Macon, Missouri

Downtown
Revitalization &
Economic
Assistance for
Missouri

Retail Market Analysis

November 2012

DOWNTOWN REVITALIZATION AND ECONOMIC ASSISTANCE FOR MISSOURI
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EXECUTIVE SUMMARY

Downtown Macon is physically remarkable with compact blocks that easily define it as the historic core of the City. Home to a professional theatre renowned throughout Northern Missouri, Downtown Macon also hosts professional services that mingle with a mix of businesses, including crafts, apparel, floral, casual dining, home furnishings, and a winery. Buildings from the earlier part of the last century are nestled together, some with significant alterations, while others, like the State Exchange Bank Building and Maples Theatre, stand proudly restored. With its fledgling business activity and the cultural and historical value of its physical assets, Downtown Macon is poised to reinvigorate itself as a distinct center for entertainment, café culture, and boutique retail activity.

This Retail Market Analysis proposes that Macon could see an increase in sales if efforts are made to retain and help expand existing retail business, increase foot traffic in Downtown Macon through promotions, marketing, and expansion of special events, as well as actively seeking to match targeted businesses to vacant storefronts. These projections are based on existing sales volumes, vacant ground floor space and estimated leakage of dollars in certain retail sectors being spent outside of Downtown and the City limits.

The Retail Market Analysis considers data from three geographic areas: The Downtown Trade Area (DTA) which is the DREAM study area; Primary Trade Area (PTA) which is the city limits; and the Secondary Trade Area (STA) which is a modified 25-minute drive-time from Downtown Macon. The existing retail market, demographics, and community surveys were also documented and analyzed to help shape recommendations that are partly guided by public preferences for new businesses and seek to strengthen and expand the retail market in Downtown Macon.

The DREAM Land Use, Building, and Infrastructure Survey revealed that Downtown Macon has 356,000 square feet of usable first-floor commercial space. Following is a breakdown of the space by current use:

- 22,600 square feet of restaurant space (9,600 square feet vacant)
- 90,000 square feet of retail space (35,400 square feet vacant)
- 243,000 square feet of office/service space (60,500 square feet vacant)

The 68,000 square feet of occupied retail and restaurant space is generating about $7.5 million in sales annually (sales do not include auto dealers, gasoline stations or non-store retail sales). The retail component is averaging sales of $125 per square foot. Restaurant sales average $46 per square foot. Using these, the 105,500 square feet of commercial vacant space noted above represents between $4.8 and $13.1 million in potential additional annual sales to the Downtown Trade Area.

The primary strategy for retail development in Downtown Macon is to first increase the foot traffic through its streets by expanding on the positive influx of visitors to the Maples Repertory Theatre and special events like Fork and Cork. The Macon Downtown Association can also work toward improving the infrastructure and aesthetic public space in Downtown Macon. With regards to attracting new retail business, a portion of this report matches vacant space Downtown to retail sectors with unmet demand in Macon's Secondary Trade Area.

Taken from Table 14 on page 23 in the report, the list below provides a few targeted suggestions for possible retail. The retail goods and services are classified by industry group according to the North American Industry Classification System (NAICS). The following retail sectors have the highest opportunity (expressed in rounded dollars of additional sales) for the STA:

- Electronics & Appliance Stores: $1,600,000
- Clothing Stores: $800,000
- Furniture and Home Furnishings Stores: $500,000
- Health & Personal Care Stores: $400,000
- Sporting Goods/Hobby/Music Instrument Stores: $300,000
- Jewelry, Luggage, and Leather Goods Stores: $200,000

The total unmet demand, including categories not listed above, could generate over $4 million dollars in additional sales for Macon and represents the potential to support 34,000 square feet of retail space. This is approximately one-third of the 105,500 square feet of commercial vacant space in Downtown Macon.

INTRODUCTION

In many communities, modern development trends have diminished the dominance of the typical American downtown in every day life and Downtown Macon is no exception. As consumers began to favor the use of the automobile, commercial development sought larger parcels of affordable, undeveloped land further from the community's historic core. In Macon, newer retailers began to locate out along Highway 63 rather than Downtown. Downtown Macon has a strong foundation of historical buildings, albeit many with significant alterations and deferred maintenance. There is high vacancy in first-floor storefronts that is an impediment to the fledgling community becoming an arts, events, and retail destination.

Stakeholders face multiple revitalization challenges with regards to retail in Downtown Macon. Some of these challenges include increasing visitors' exposure to Downtown Macon businesses, growing singular successful Downtown businesses into unique districts with regional appeal, infrastructure improvements, restoring the charm of historic building facades, and uncovering a new unifying Downtown aesthetic that pleases pedestrians and truly frames public space as a valued amenity. These challenges are daunting to those who have undertaken the important work of revitalizing Macon's Downtown. With this report and the previous components of the DREAM Initiative already completed in Macon, the Mainstreet Macon Downtown Association (MMDA) and its partners will have a clearer game plan in hand to guide their revitalization efforts.

This report assembles the physical conditions, demographic changes, public input, and retail market analyses within the Macon trade areas. From analysis of this data, the MMDA and other Downtown Macon stakeholders should coordinate their efforts along four overarching goals:

- Expand Downtown Events to Increase Downtown Foot Traffic
- Increase Business Retention & Expansion
- Use Targeted Retail Uses and Mix to Encourage Formation of Districts
- Establish an Improved Aesthetic for Downtown

Further recommendations on implementation and strategies toward achieving these goals are also compiled in the final sections of the report. The purpose of this document is to become a reference tool for the MMDA and its partners as they revitalize Downtown Macon, storefront by storefront, into a vibrant retail destination.

BACKGROUND & METHODOLOGY

A comprehensive approach is taken to identify potential retail services that would be successful in Downtown Macon. It also makes recommendations on appropriate retail development strategies. The report consists generally of four parts;

1) a review of the trade area demographics and trends;
2) an analysis of the trade area business mix and site characteristics;
3) identification of potential retail sectors to target; and
4) recommendations of retail development strategies and implementation techniques to achieve goals.

After the Macon trade areas are defined, the retail demand, or spending power of each trade area, is compared to its retail sales in order to quantify unmet retail demand that may potentially be served in Downtown Macon. The retail categories with unmet demand are evaluated against the priorities and preferences found in public input from community surveys, focus groups, and visitor surveys. As a component of other DREAM Initiative activities, the surveys were conducted of business owners, City staff, residents and visitors which provide key insights into desired Downtown Macon improvements and retail services. Further refinement of this input is made by considering the economic and physical conditions present Downtown. The resulting retail development strategies and other implementation recommendations are then formed around the aim of fully serving these targeted retail sectors.

LIMITS OF STUDY

The Retail Market Analysis is intended to provide a general forecast of the amount and types of retail development that could be supported Downtown. The assumptions and projections used in the analysis are current and supported through the year 2016. Unexpected changes in physical conditions, local organizational structures, demographic movement, and the local and national economy may materially change the accuracy and in some cases may render the recommendations in this report to be invalid. The analysis is meant to provide general strategic direction for developing retail in Downtown Macon. This study is not intended to be the sole basis for development decisions.

TRADE AREA PROFILE

The term "trade area" refers to the geographic area from which a majority of customers for a given business originate. Different retail business categories can have trade areas that differ in size. For example, the trade area for a convenience store or hair salon might be quite small, whereas a car dealership or specialty electronics retailer's trade area would be much larger. The concept of trade areas is an important part of evaluating the performance of a retail district and determining the potential of expanding retail activity within a geographic area.

TRADE AREA DEFINITIONS

Retail market analysis often evaluates three different geographic trade areas: a Downtown Trade Area (DTA), Primary Trade Area (PTA) and a Secondary Trade Area (STA). A map of each area is included in Appendix A. The three areas of analysis are summarized below.

- Downtown Macon (DTA): The focus of this area of analysis is to determine the current level of retail activity captured by Downtown Macon and the amount of additional retail activity that could be captured by Downtown. Downtown Macon is defined as the DREAM Study Boundary.

- Primary Trade Area (PTA): This trade area is classified as the boundary of the City of Macon. It is useful to show the relationship between Downtown and citywide retail activity.

- Secondary Trade Area (STA): This trade area utilizes a modified 25-minute drive-time "catch-basin" around Downtown. The 25-minute drive boundary is an acceptable catch-basin of consumers likely to make a shopping trip to Downtown. Most sales in the DTA will come from the STA. It has been modified to accommodate for retail competition from Moberly, MO to the south.

It is important to note that the STA ignores municipal, county, and state boundaries. The vast majority of consumers will typically shop at a location most convenient for them to travel to, regardless of jurisdiction.

TRADE AREA DEMOGRAPHIC SNAPSHOT

To better characterize and understand the demographic composition of each trade area, a baseline will be used. An appropriate baseline for comparison of DREAM communities is demographic data for the State of Missouri.

The table below is a snapshot from 2010 of the demographics for Downtown Macon, the PTA, STA, and the State of Missouri. The data was obtained from the 2010 US Decennial Census. The amounts are estimates extrapolated from local census tracts and City of Macon information. For comparison, the tables in this report include 2016 projections from a third-party supplier. These are derived from census data and general demographic trends for the State of Missouri.

TABLE 1: 2010 DEMOGRAPHIC SNAPSHOT

	Downtown Macon	Primary Trade Area	Secondary Trade Area	State of Missouri
Population	425	5,471	15,632	5,988,927
Average Household Income	$43,140	$46,240	$45,821	$59,252
Housing Units	236	2,727	7,730	2,712,729
Owner Occupied	102	1,481	4,787	1,633,610
Renter Occupied	89	888	1,720	742,001
Vacant Units	45	358	1,223	337,118
Median Age	33.8	42.8	42.8	38
19 and Under	126	1,392	4,090	1,601,411
20-44	140	1,468	4,150	1,937,372
45 and Over	160	2,611	7,390	2,450,144

The following review of demographics in the Macon trade areas helps inform the kinds and amount of retail that is supportable in Downtown Macon. For example, a marked increase in the adult population aged 45 years and older in the trade areas may influence the support of certain kinds of retail business versus an increase in children aged 19 years and younger. The demographic trends discussed in the report, together with the retail demand analysis, provides support to recommendations in matching certain retail categories with Downtown vacancies.

MARKET PROFILE/DEMOGRAPHIC TRENDS

DOWNTOWN MACON (DTA)

Downtown (defined as the area within Macon's DREAM boundary) is roughly 89 acres and consists of approximately 255 buildings on 32 city blocks (see Figure 1).

In 2010, approximately 425 people lived Downtown in 191 occupied housing units for an average of 2.2 persons per occupied unit. The average household income was $43,140. The median age was 33.8 with 29.6% of the population being age 19 or younger, 32.9% between 20 and 44 years of age, and 37.6% age 45 years or more.

Figure 1: Downtown Macon

The population in Downtown has decreased over the past decade with a decline in the number of housing units. The following table illustrates current and anticipated demographic trends for the DTA:

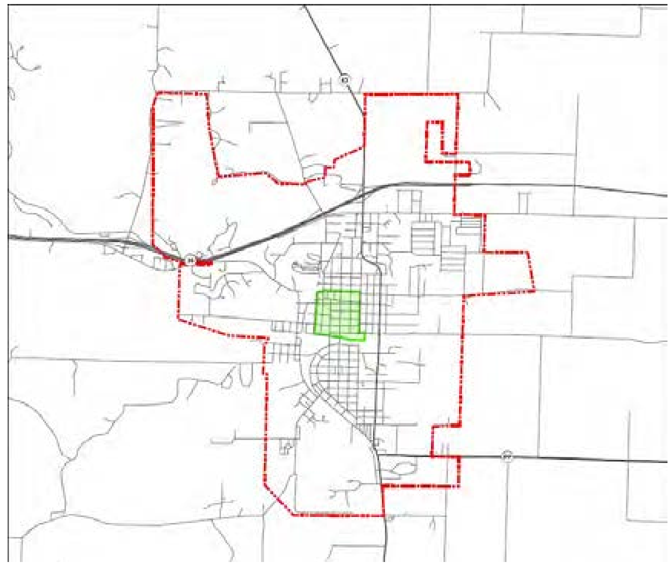
TABLE 2: DOWNTOWN MACON

	2000	2010	2016	% Change '00-'10	% Change '10-'16
Population	439	425	378	-3.2%	-11.1%
Average Household Income	$33,171	$43,140	$47,553	30.1%	10.2%
Housing Units	288	236	210	-18.1%	-10.8%
Owner Occupied	126	102	90	-19.0%	-11.4%
Renter Occupied	89	89	89	0.0%	0.0%
Vacant Units	49	45	43	-8.2%	-4.9%
Median Age	35.5	33.8	34.8	-4.8%	3.0%
19 and Under	128	126	106	-1.6%	-15.9%
20-44	129	140	123	8.4%	-12.1%
45 and Over	172	160	149	-6.9%	-6.9%

PRIMARY TRADE AREA (PTA)

As of 2010, 5,471 people lived in the PTA (defined as the City limits of Macon, see Figure 2) in 2,369 occupied housing units for an average of 2.3 persons per occupied unit. The average household income was $46,240. The median age was 42.8. About 25% of the population are 19 or younger; 27% of the population are between 20 and 44 years of age; and 48% of the population are 45 years of age or more.

Figure 2: Primary Trade Area



City of Macon

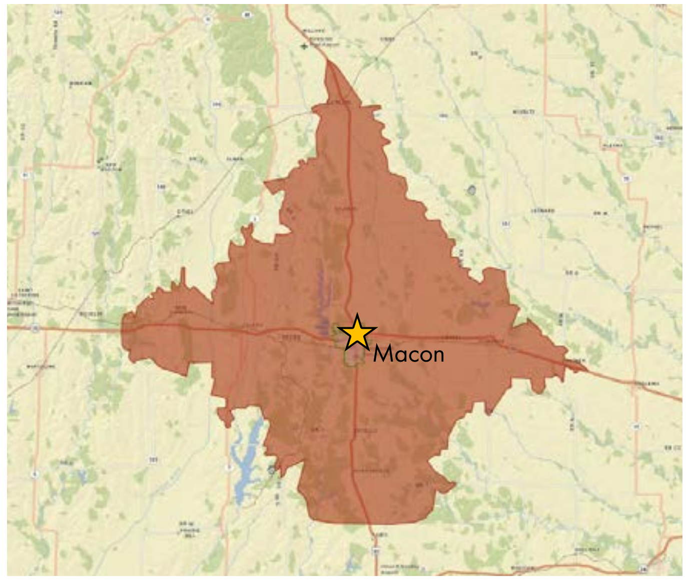
From 2000 to 2010, the population of the PTA has decreased by 1.2% and is anticipated to decrease over the next few years. During the same time, average household income has increased 27%. The number of vacant and renter occupied housing units has increased. This demographic shift may influence the retail and service needs of the City in the near future. The following table illustrates current and anticipated demographic trends for the PTA:

TABLE 3: PRIMARY TRADE AREA

	2000	2010	2016	% Change '00-'10	% Change '10-'16
Population	5,538	5,471	5,235	-1.2%	-4.3%
Average Household Income	$36,400	$46,240	$51,038	27.0%	10.4%
Housing Units	2,723	2,727	2,729	0.1%	0.1%
Owner Occupied	1,636	1,481	1,397	-9.5%	-5.7%
Renter Occupied	798	888	948	11.3%	6.8%
Vacant Units	289	358	409	23.9%	14.3%
Median Age	41.8	42.8	44.1	2.4%	3.0%
19 and Under	1,407	1,392	1,286	-1.1%	-7.6%
20-44	1,474	1,468	1,377	-0.4%	-6.2%
45 and Over	2,519	2,611	2,570	3.7%	-1.6%

SECONDARY TRADE AREA (STA)

Figure 3: Secondary Trade Area



In 2010, an estimated 15,632 people lived in the STA (refer to Figure 3) in 6,507 occupied housing units for an average of about 2.4 persons per occupied unit. Average household income was $45,821. The median age was 42.8 with approximately 26.1% of the population age 19 or younger, 26.5% between 20 and 44 years of age, and 47.2% age 45 years or more.

From 2000 to 2010 there was a 2.3% decrease in population. While the total number of housing units has increased over the same time period, most of that growth has since become vacant or renter occupied. Average household income in the STA has seen a 19.9% increase over this ten-year period. At the same time, the median age has increased from 40.2 to 42.8 and is anticipated to continue increase at the same rate. This slight aging of the STA population is similar to the demographic change seen in the PTA. It may reflect more mature households in the prime of their work lives as well as an increase in those approaching retirement. The following table illustrates current and anticipated demographic trends for the STA:

TABLE 4: SECONDARY TRADE AREA

	2000	2010	2016	% Change '00-'10	% Change '10-'16
Population	16,007	15,632	15,214	-2.3%	-2.7%
Average Household Income	$38,206	$45,821	$50,196	19.9%	9.5%
Housing Units	7,587	7,730	7,817	1.9%	1.1%
Owner Occupied	5,003	4,787	4,663	-4.3%	-2.6%
Renter Occupied	1,600	1,720	1,797	7.5%	4.5%
Vacant Units	1,047	1,223	1,346	16.8%	10.1%
Median Age	40.2	42.8	44	6.5%	3.9%
19 and Under	4,299	4,090	3,826	-4.9%	-6.5%
20-44	4,844	4,150	3,917	-14.3%	-5.6%
45 and Over	6,865	7,390	7,471	7.7%	1.1%

STATE OF MISSOURI

The changes in demographics of the previous DTA, PTA, and STA are compared against those of the State. In 2010, nearly six million people live in Missouri in approximately 2.3 million housing units with an average of 2.5 persons per housing unit. The average household income has risen by 18%. The median age was 37.8. About 26.7% of the population are age 19 or younger; 32.3% are between the ages of 20 and 44; and 40.9% are age 45 years or more. Table 5 illustrates current and anticipated demographic trends for the State of Missouri.

TABLE 5: STATE OF MISSOURI

	2000	2010	2016	% Change '00-'10	% Change '10-'16
Population	5,595,211	5,988,927	6,158,099	7.0%	2.8%
Average Household Income	$49,956	$59,252	$66,429	18.6%	12.1%
Housing Units	2,442,017	2,712,729	2,893,162	11.1%	6.7%
Owner Occupied	1,542,149	1,633,610	1,691,741	5.9%	3.6%
Renter Occupied	652,445	742,001	803,110	13.7%	8.2%
Vacant Units	247,423	337,118	410,445	36.3%	21.8%
Median Age	36.1	37.8	38.4	4.7%	1.6%
19 and Under	1,594,172	1,601,411	1,601,424	0.5%	0.0%
20-44	1,995,800	1,937,372	1,952,597	-2.9%	0.8%
45 and Over	2,005,239	2,450,144	2,604,078	22.2%	6.3%

DEMOGRAPHIC COMPARISON

Tables 6, 7, and 8 compare the rates of demographic change for the trade areas and the State of Missouri. The population comparison shows that the Macon area, including the STA, has experienced population loss over the past decade, while the State has experienced an increase. All three trade areas experienced growth in average household income. They outperformed the State with the DTA having the highest growth.

TABLE 6: DEMOGRAPHIC COMPARISON

	Population % Change		Average HHI % Change		Median Age Change (in years)	
	00-'10	10-'16	00-'10	10-'16	00-'10	10-'16
Downtown	-3.2%	-11.1%	30.1%	10.2%	-1.7	1.0
PTA	-1.2%	-4.3%	27.0%	10.4%	1.0	1.3
STA	-2.3%	-2.7%	19.9%	9.5%	2.6	1.7
State	7.0%	2.8%	18.6%	12.1%	1.7	0.6

TABLE 7: DEMOGRAPHIC AGE COMPARISON

	19 & Under Change		20-44 Change		45 & Over Change	
	00-'10	10-'16	00-'10	10-'16	00-'10	10-'16
Downtown	-1.6%	-15.9%	8.4%	-12.1%	-6.9%	-6.9%
PTA	-1.1%	-7.6%	-0.4%	-6.2%	3.7%	-1.6%
STA	-4.9%	-6.5%	-14.3%	-5.6%	7.7%	1.1%
State	0.5%	0.0%	-2.9%	0.8%	22.2%	6.3%

The median age of the population in both the PTA and STA is expected to increase at a rate that exceeds that of the State of Missouri. After trending slightly younger over the past ten years, the median age of the Downtown population is anticipated to age slightly in the next few years. The income growth in Downtown and the PTA indicates those areas are maintaining their retail viability; however, the decrease in housing units in Downtown Macon may pose a challenge to new retail.

TABLE 8: DEMOGRAPHIC HOUSING UNITS COMPARISON

	Housing Units Change	Owner Occupied Change	Renter Occupied Change
	00-'10	00-'10	00-'10
Downtown	-18.1%	-19.0%	0.0%
PTA	0.1%	-9.5%	11.3%
STA	1.9%	-4.3%	7.5%
State	11.1%	5.9%	13.7%

Table 7 is a comparison of past and anticipated trends in the number of people in the three major age groups. Looking ahead, these show a declining population across all age groups in all three trade areas except for residents 45 and older within the STA where there is an expected 1.1% increase. These trends can influence what products retailers might consider offering in Macon over the next few years.

Table 8 shows the past trend in housing units by type in each trade area. The highest growth in the last ten years has been in renter-occupied units within the PTA. The growth is just shy of the State's 13.7% growth in rental units. This trend is likely a product of the continued depressed housing market and is anticipated to improve as the economy slowly recovers.

HOUSING MARKET ANALYSIS SUMMARY

"Downtown would benefit from an increase in the number of residential units in the area. The more households that live Downtown the more consumers there would be in the market to help support existing Downtown businesses. An increase in the area population could also help to induce new businesses to move to Downtown."
- from the Residential Demand Analysis, January 2011

A few of the benefits of increasing residential units Downtown are:

- utilizing vacant upper floor space and underutilized land and buildings
- increasing consumer traffic and density
- increasing the local tax base
- creating ideal conditions for extended business hours
- addition of new businesses.

To gauge any unmet demand for Downtown housing, the Missouri Housing Development Commission (MHDC) conducted a Residential Demand Analysis in December 2010 with a focus on Downtown. The analysis concluded the Downtown market could absorb 19 additional market-rate rental units and 16 affordable senior housing units for a total of 35 rental units.

The Downtown housing market appears to have good demand as evidenced by good occupancy rates. The City should pursue a policy of encouraging mixed-use buildings that would allow residential and commercial growth. These two land uses are synergistic resulting in a more vibrant community and livelier shopping experience. As the housing market moves towards a recovery, the City should utilize its resources to promote the planning for conversion of some upper floors of existing commercial buildings into residential uses where appropriate.

There are currently a significant number of buildings with vacant space on upper floors. While some of this space could be encouraged for office and service, some should be used for residential. Converting this vacant space to residential units would work toward meeting the 35 unit demand for rental apartments as estimated by the Residential Demand Analysis. Target markets for rental or for-sale units could include young adults, households without children, households with teenaged children, empty-nesters, and seniors.


CONSUMER SEGMENTS

To maximize both sales and brand loyalty from consumers, communities and retailers should understand the unique desires and needs of various consumer groups. Once these are identified, Downtown retail can better serve these segments. According to the report's research, there are four broad categories of consumers Downtown Macon serves:

Downtown Employees

- Downtown is home to over 600 employees over 100 businesses.
- This equates to a potentially large annual economic impact:
    - 617 x $15 weekly would equal nearly $500,000 a year spent by Downtown employees.
- This segment demands quick food service at lunch and early evenings.
- Additional demand for convenience items and after hours shopping.
- Frequent customer reward programs can be effective when targeting this segment.
- Special 'lunch hour only' promotional events may also be successful among retailers

Downtown Residents

- There are an estimated 425 residents Downtown.
- Like Downtown employees, frequent customer reward programs can be effective.
- As the median age in Macon increases slightly, retailers should explore product lines that appeal to households with slightly higher incomes who may have no children at home.

Macon Residents

- Macon has a total population of 5,471 citywide (PTA) according to the 2010 Census.
- Effective strategies for this segment inspire brand loyalty through targeted marketing timed with community calendar events (e.g., back-to-school, July 4th, etc.) and local taste preferences and pricing (e.g., traditional, conservative styles at value pricing versus contemporary styled items at higher price points)
- Unique product offerings that fill a void at local 'big box' retailers
- Offering 'experience' in the form of excellent, knowledgeable customer service or appealing in-store environment or presentation

Downtown Visitors

- This segment represents a non-resident customer base that is shopping, dining, or conducting business in Downtown Macon.
- A full special events calendar can drive traffic nearly year-round and maximize the number of visitors spending time and money Downtown
- Extended hours and special promotional events can get visitors to linger Downtown and spend money (e.g., extended hours on 'First Fridays' or timed with theater dates)

COMMUNITY SURVEYS

After describing the typical needs and desires of consumer segments, the community's perceptions and desires for Downtown Macon are considered. This further refines the potential types of retail, restaurant, and entertainment offerings that may be successful. The DREAM Initiative conducted focus groups community stakeholders, a telephone survey of residents, and a visitor survey. Results of the surveys indicated a strong preference for the following businesses:

- Boutique and Specialty Stores
- Increased Dining Options – Family Restaurants, Fine Dining, Sports Bar and Grill
- Women's Clothing Stores
- Venue for live music
- Ice Cream and Coffee Shops
- Bookstore

Key points from the surveys relevant to retail development are summarized below.

Focus Groups

Focus groups were conducted to gather initial information about Downtown Macon relative to four groups: Downtown stakeholders, elected officials, long-time residents and newer residents. Some statements from participants regarding retail development include:

Perceptions

- *Shopping*. Residents shop at Wal-Mart, the grocery stores, and a few Downtown stores in Macon; however, residents do much of their shopping at the mall in Columbia, Missouri or online.
- *Wal-Mart*. While residents of smaller communities very near Macon do come to the Macon Wal-Mart, most nearby communities are also near towns such as Kirksville or Moberly that have Wal-Mart Supercenters, and those residents do not shop in Macon.
- *Dining*. Participants felt that there is not enough variety for dining in Macon and drive to Columbia to dine out for special occasions or for variety.
- *Entertainment*. Many residents travel to Columbia for entertainment, especially nighttime entertainment and fine dining.
- *Infrastructure*. Downtown would be more attractive to new business if the City focused on improving streets, sidewalks, infrastructure, and the aesthetics of Downtown.
- *Business Hours*. Business hours are inconvenient especially during weekday evenings and Saturday afternoons; longer business hours might deter residents from going to Columbia and encourage them to stay in Macon, especially for dining and entertainment.
- *Parking*. Many people perceive a parking problem (though there are parking lots available), because they often have to walk a block or two from their parking spot to a store—suggestions to remedy this included angled parking, filling more storefronts to make

the walk from the parking lot more pleasant and interesting, and improving the sidewalks to make the walk safer and more appealing.

Priorities

- *Small Business.* Participants suggested focusing on independently owned specialty-type shops and restaurants rather than larger chains.
- *Specialty Stores.* Participants suggested more men's, women's, and children's clothing stores, more shoe stores, and a bookstore, a small grocery store, and any other kind of specialty shop.
- *Dining.* Participants suggested additional restaurants, including fine dining, a wine lounge or beer garden, a coffee shop, a tea shop, a deli, a higher-end bar and grill, and a variety of casual dining options, all with later business hours and possibly outdoor seating.
- *Arts and Entertainment.* Arts and entertainment would be a good focus for Downtown because Macon already has a strong performing arts tradition and also has a number of local artisans and musicians.
- *Downtown Macon Experience.* Downtown's purpose is not to compete with Wal-Mart and other large chains, nor is it to compete with the larger malls in Columbia; it is to offer a unique and "quaint" experience to customers. To this end, small businesses should be encouraged, and the City should find and offer incentives to building owners.

Telephone Survey

The DREAM Initiative also conducted a community phone survey to verify perceptions of Downtown and determine community desires for Downtown. Findings relevant to retail development are listed as follows:

- 61% of respondents answered that "improving building facades" should be a high priority for Downtown Macon and 55% placed a high priority on "keeping streets and sidewalks cleaner."
- Residents most often visit Downtown to visit government/ post office (73%), conduct business (51%), shop (51%), attend special events (44%), dine (42%), attend church (43%), find entertainment (32%), various outdoor recreation (30%)
- Four types of businesses were viewed as a "very high" or "high" priority to a majority of respondents:
    - Family or casual dining (71%)
    - Clothing stores (63%)
    - Fine Dining (56%)
    - Shoe stores (53%)
- Five other improvements considered a priority to less than half of respondents:
    - Making the area more pedestrian-friendly (49%)
    - Improving lighting (45%)

  - Moving utilities underground (41%)
  - Adding green space and landscaping (38%)
  - Adding new parking spaces or lots (37%)

Visitor Survey
Using local volunteers, the DREAM Initiative also conducted a Visitor Survey of those shopping, eating, or lodging in Macon. Visitors were asked which kinds of entertainment options or businesses they would like to see Downtown.

- Visitors planned on the following six activities during their visit to Downtown Macon:
  - Shopping (73%)
  - Dining (51%)
  - Special event (51%)
  - Nightlife/Entertainment (41%)
  - Government/Post Office (29%)
  - Conducting Business (26%)
- Navigating Downtown.
  - 87% said that parking is very or somewhat convenient
  - 78% indicated it is very easy to find their way around Downtown
  - 71% indicated Downtown business hours are "very" or "somewhat" convenient.
- Recreation or entertainment that would make them more likely to visit Downtown Macon:
  - Family restaurants (36%)
  - Bands/live concerts/music (29%)
  - Fine dining (25%)
- Businesses that would make them more likely to visit Downtown Macon:
  - More shops in general (39%)
  - Coffee shop (24%)
  - Women's clothing (21%)
- 35% said they were staying overnight in Macon.
- Excluding lodging, visitors were likely to spend the following amounts in Downtown Macon during their visit:
  - 37% said they would spend between $50 and $99.
  - 16% said they would spend between $100 and $199.
  - 5% said they would spend over $200.

Figure 4, below, identifies the highest business priorities indicated by the Focus Groups, Community Telephone Survey, and Visitor Survey.

DOWNTOWN BUSINESS PREFERENCES

Focus Groups		Community Survey		Visitor Survey	
Coffee/Tea Shop	Most Groups	Family or Casual Dining	71%	More Shops in General	39%
Fine Dining	Most Groups	Clothing Stores	63%	Coffee Shop	24%
Casual Dining	Some Groups	Fine Dining	56%	Women's Clothing	21%
Clothing Stores	Some Groups	Shoe Store	53%	Ice Cream Shop	18%
Grocery	Some Groups	Ice Cream Shop	45%	Bookstore	17%
Shoe Stores	Some Groups	Arcade/Youth Activities	45%	Shoe Store	13%
Specialty/Boutique	Some Groups	Convenience/Grocery Store	44%	Antique Shop	11%
Bookstores	One Group	Coffee Shop	42%	Specialty/Upscale	11%
Deli	One Group	Art Gallery	31%	Art Galleries/Shops	10%
Hardware Stores	One Group	Lodging/Bed & Breakfast	30%	Convenience/Grocery	5%
Wine/Beer Garden	One Group	Antique Shops	27%	Men's Clothing	4%
		Bars/Nightclubs	13%	Lodging	4%

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MARKET RESEARCH FINDINGS

The following analyses provide supporting data for the recommended match of vacant commercial spaces in Downtown Macon with potential retail sectors based on unmet demand. The following steps are covered:

- Review of existing first-floor land use and vacancy
- Review of existing retail establishments by category
- Review of select household consumer expenditures by retail category
- Identification of retail categories with unmet demand or 'retail opportunity'
- Calculation of potential retail square footage supported by retail opportunity
- Allocation of vacant first-floor space with potential retail by category

LAND USE MIX & VACANCY

Table 9 organizes information on Downtown land use collected during the DREAM Land Use, Building & Infrastructure Survey task conducted in 2009 and subsequently updated with assistance from City staff. Downtown has a total of 272 parcels on which 255 primary buildings are located with 667,153 square feet of first-floor space. Forty-two buildings have retail or restaurant uses on the first-floor covering 113,000 square feet. Approximately 45,000 (40%) square feet of the retail and restaurant space is vacant.

TABLE 9: LAND USE TOTALS & FIRST-FLOOR SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Residential					
Single-Family	126	126	168,010	10,283	6.1%
Multi-Family	9	10	19,439	2,436	12.5%
Sub-Total	**135**	**136**	**187,449**	**12,719**	**6.8%**
Commercial					
Office / Service	53	54	243,173	60,500	24.9%
Retail	31	33	90,061	35,350	39.3%
Restaurant	8	9	22,645	9,610	42.4%
Mixed-Use	0	0	0	0	0.0%
Sub-Total	**92**	**96**	**355,879**	**105,460**	**29.6%**
Public / Institutional	15	23	123,825	4,726	3.8%
Recreation	2	0	NA	NA	NA
Parking Lot	15	NA	NA	NA	NA
Vacant Lot	11	NA	NA	NA	NA
TOTAL	**270**	**255**	**667,153**	**122,905**	**18.4%**

* Building Square Footage assumes that 80% of the building footprint is usable.

* Building Square Footage is for the 1st Floor only.

There are 54 office and service buildings with 243,173 square feet of first-floor office and service space. Approximately, 60,500 (25%) square feet of the office and service space is vacant and may be suitable for conversion to retail or restaurant.

Table 9 also indicates the first-floor space in Downtown Macon is composed of 28% residential, 36% office or service,18% public or institutional, and 16% retail or restaurant. First-floor retail and restaurant uses are critical to a vibrant Downtown atmosphere. However, in Downtown Macon, non-retail uses account for 82% of the first-floor space. This imbalance may require the City of Macon to take aggressive measures such as adjusting zoning codes to preserve prime, first-floor spaces for retail and restaurant use and encouraging the conversion of existing office and service spaces toward retail and restaurant use.

RETAIL ANALYSIS

Analyzing current sales per square foot of retail and restaurant space can help indicate potential sales performance of vacant first-floor space. The retail and restaurant space is generating about $7.5 million in annual sales (sales do not include auto dealers, gasoline stations or non-store retailers). The retail component is generating $125 per square foot annually and the restaurant portion about $46 per square foot. Using these averages, the105,460 square feet of vacancy that could be used by, or converted into, retail represents $5 to $13 Million in potential annual sales.

Table 10, below, breaks down some of the retail establishments in Downtown Macon, the PTA, and the STA.

TABLE 10: RETAIL ESTABLISHMENTS

Retail (Pedestrian-Generating Businesses) Trade Summary	Downtown Macon		Primary Trade Area		Secondary Trade Area	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
Food Services & Drinking Places	3	29	22	274	38	417
Miscellaneous Store Retailers	3	6	11	21	18	35
Food & Beverage Stores	0	0	8	102	18	239
Accommodation	1	6	6	48	12	75
Bldg. Materials & Garden Equipment & Supplies	2	18	7	44	10	51
Arts, Entertainment & Recreation	1	6	6	27	12	39
Furniture & Home Furnishings Stores	3	6	7	17	9	19
General Merchandise Stores	2	10	6	125	7	125
Health & Personal Care Stores	1	9	4	135	7	156
Sporting Good, Hobby, Book & Music Stores	0	1	4	20	7	23
Electronics & Appliance Stores	1	3	5	12	5	12
Clothing & Clothing Accessories Stores	2	7	3	11	3	11
TOTALS:	*19*	*101*	*89*	*836*	*146*	*1,202*
Total Businesses (including non-retail)	99		401		785	
Total Employees (including non-retail)	617		3,833		6,182	
Total Residential Population	425		5,471		15,632	
Employee/Population	1.45		0.70		0.40	

According to Table 10, Food Services and Drinking Establishments (restaurants and bars) have the highest number of businesses in all three trade areas with 63 total. Clothing stores are the least represented with only 8 businesses. Downtown Macon is an employment center with respect to the ratio of employees to residents (1.45). Generally speaking, employees are drawn toward the DTA from the PTA and STA.

Table 11, below, provides a select listing of major Downtown businesses. The retail services in both Tables 10 and 11 are organized by NAICS code to allow comparison of retail activity by sectors. Due to differences in allocating businesses to various categories, these tables may not match completely. With regards to dining away from home, the tables indicate Downtown Macon primarily has casual eating and drinking establishments. Retail is dominated by resale, furniture/home furnishings, and other miscellaneous categories.

TABLE 11: EXISTING RETAIL

NAICS Industry Group	Store Name
Sporting Goods & Hobby Stores	Ben Franklin
Health & Personal Care Stores	Miller's Rexall Drug
Clothing & Clothing Accessories Stores	The Junction Shop
Jewelry, Luggage, & Leather Goods Stores	Frank's Jewelry
	Sim's Jewelry
Furniture & Home Furnishings Stores	Helton Appliance
	Macon Frames
	Barry's Carpet
Miscellaneous Store Retailers	Lou Lou's
	Long Branch Embroidery
	Sherry's Flowers
	JP's Corner Market
Used Merchandise Stores	Used Thrift Store
	Red Door
	N&B Auction Services
	West Mercantile Fine Books & Antiques
Food Services & Drinking Places	Apple Basket Café
	Ole Beaumont
	BoJangles
	Wooden Nickel
	West Winery
	Downtown Eatery

HOUSEHOLD CONSUMER EXPENDITURE

Estimating average household spending per retail sector provides insight into the potential demand for particular retail services within a given trade area. Table 12 lists annual household consumer expenditures for seven main categories and several sub-categories.

The PTA has the highest average household income. This number drops slightly moving out to the STA. Downtown has the lowest average household income among all three trade areas. The largest portion of expenditures are spent on food (at home and away from home), transportation, and entertainment and recreation. Residents in the trade areas spend approximately 40% of food expenditures on food away from home. Retail expenditures were nearly the same across all three trade areas.

TABLE 12: CONSUMER EXPENDITURES

	Downtown Macon	Primary Trade Area	Secondary Trade Area
Average Household Income	$43,140	$46,240	$45,821
Average Annual Household Expenditures for Selected Retail Sectors			
Food	**$4,927**	**$4,974**	**$5,077**
Food at Home	$2,930	$2,975	$3,055
Food Away from Home	$1,997	$1,999	$2,023
Apparel and Services	**$1,014**	**$1,002**	**$1,004**
Household Merchandise	**$1,002**	**$1,025**	**$1,045**
Electronics	$241	$239	$239
Household Goods	$760	$786	$806
Household Care	**$1,239**	**$1,338**	**$1,369**
Transportation	**$2,586**	**$2,686**	**$2,806**
Health & Personal Care	**$757**	**$803**	**$842**
Health Care	$507	$548	$583
Personal Care Products	$250	$255	$259
Entertainment & Recreation	**$2,569**	**$2,648**	**$2,732**
Total for selected sectors	**$14,094**	**$14,476**	**$14,875**

Table 13 shows the number of households at regular income ranges in each trade area. Almost sixty Downtown Macon households have incomes above $50,000. The PTA and STA, together, have about 3,000 households in these higher income ranges. These higher income households have potentially more disposable income compared to the average Macon household with an income of $45,000. Targeting the residents of these households and measuring their tastes and preferences in retail goods and services should be considered as part of overall marketing efforts to expand the Downtown retail base.

TABLE 13: HOUSEHOLD INCOME

Income Level	Downtown Macon	Primary Trade Area	Secondary Trade Area
Less than $ 15,000	39	461	1,143
$ 15,000 - $24,999	32	384	1,023
$ 25,000 - $34,999	27	323	913
$ 35,000 - $49,999	29	372	1,202
$ 50,000 - $74,999	28	386	1,179
$ 75,000 - $99,999	15	216	547
$ 100,000 - $149,999	12	154	349
$ 150,000 - $199,999	1	17	50
$ 200,000 +	1	22	53
Total	184	2,335	6,459

POTENTIAL STORE SPACE SUPPORTED

In Table 14 below, the unmet demand (the difference between retail demand and actual sales) is listed for the retail categories demonstrating the greatest opportunity. The analysis considers the total unmet retail demand within the STA and the average retail sales per square foot ($125) and the average restaurant sales per square foot ($46). This information indicates that Downtown Macon could support an estimated 34,000 square feet of retail/restaurant space. Existing retailers demonstrating significant growth could capture this unmet demand by expanding floor area and adding new products or new retailers could enter the marketplace.

As Table 14 also shows, meeting all of the unmet retail demand could generate over $4 million dollars in additional sales for Macon. While it is uncertain Macon will realize the full $4 million potential demand, this situation indicates the City should consider strategies to grow and attract retail and restaurant businesses into the vacant locations in Downtown Macon.

TABLE 14: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.)
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$1,598,988	12,000
Clothing Stores (NAICS 4481)	$ 805,078	6,000
Furniture & Home Furnishings Stores (NAICS 442)	$ 488,164	3,000
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$ 398,983	3,000
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$ 331,351	3,000
Other Miscellaneous Store Retailers (NAICS 4539)	$ 234,560	1,000
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$ 179,634	1,000
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$ 143,670	1,000
Shoe Stores (NAICS 4482)	$ 45,102	300
Specialty Food Stores (NAICS 4452)	$ 41,679	300
TOTAL	**$ 4,267,209**	**30,600**

[1] Indicates unmet consumer demand within the Secondary Trade Area.

[2] Based on $125 in retail sales per square foot, $46 in restaurant sales per square foot, and existing retail building inventory and activity in Downtown Macon.

The key retail sectors from Table 14 that demonstrate high-growth potential for Downtown, include:

- *Electronics and Appliance Stores*

  These stores sell new household appliances such as refrigerators, dishwashers, microwave ovens, washing machines, coffeemakers, or irons. They may also service these appliances. Operators in this sector should take care to identify and fill voids in the appliance offerings at big box retail stores and any area competitors. Storefronts along North Rollins may be appropriate for these retailers as they may join Helton Appliance in creating a complementary retail cluster.

- *Clothing Stores–*

These stores retail new clothing and clothing accessories. Again, the most appropriate and successful clothing retail in Downtown Macon will not try to compete with big box retail offerings. It is in this retail space, particularly as specialty shops or boutiques, that the operators be very knowledgeable of their core customer's desired entry price and taste and preferences. For instance, given the growing number of adults in the prime of their work lives or entering retirement in the Macon area and their relative higher incomes and increased free time without children in the home, one possible retail operation worth exploring may be women's casual clothing, resort wear, and accessories. The operator should offer a distinct shopping experience for the visitor in both product selection and in-store design.

Storefronts along the 100 block of Vine between Rubey and N. Rollins may be appropriate as they are anchored by the Maples Theatre and Ben Franklin at each end with the West Winery nestled in the middle of the block. In the evening, theatre-goers may shop a clothing store before or after a show with a stop at the Winery. During the day, arts and crafts shoppers at Ben Franklin may likewise be tempted to stop in at a clothing boutique. The co-location of these businesses frequented by a common core customer has the power to create synergy.

- *Furniture & Home Furnishings–*

These stores sell new furniture for the home, floor coverings, and window treatments. They may also provide repair or installation services for their retail goods. Individual operators in this sector should look to compete on several factors. Specialization, for instance, provides both deeper product knowledge and a wider breadth of product offerings to customers. This effectively carves out a competitive niche for the store in contrast to the more generic offerings found in a big box aisle. Service should be enthusiastic, deeply knowledgeable, and personalized. Staff with specific knowledge in your product drives customer loyalty. Finally, design is the major differentiating factor in a retail setting. This may extend to the operator's ability to show how their furniture may contribute to a finished 'look'. It may be illustrating a certain style or fashion trend in home furnishings by curating a selection of home furnishings together in the store. Any one or all of these factors, when properly addressed, can push an operator's store to the top of the list for local consumers over the local big box store.

Storefronts along the 100 block of Vine and northbound along the 100 and 200 blocks of North Rollins may be appropriate spaces for retail businesses in this sector with their close proximity to existing stores selling floor coverings and framing services.

- *Health & Personal Care Stores–*

These stores may sell any of the following:

  - Prescription or non-prescription medications
  - Vitamins or nutritional supplements
  - Cosmetics, grooming supplies, and toiletries
  - Prescription eyeglasses or contact lenses
  - Hearing or medical devices

Storefronts on the three blocks bounded by Vine St., N. Rollins St., Daugherty St., and N. Rubey St. may be appropriate for these stores in order to create synergy among existing medical offices and Miller's Rexall Drug.

- *Sporting Goods/Hobby/Musical Instrument Stores–*

These stores may specialize in selling any of the following:

  - Specialty sports and fitness equipment, bicycles, camping gear, sports footwear and accessories
  - New toys, games, hobby and craft supplies
  - Fabric and sewing supplies
  - New musical instruments, sheet music, musical instrument repair, musical instruction

Storefronts in proximity to the Ben Franklin, along the 100 block of North Rollins, are an appropriate choice given the traffic that is driven to this Downtown Macon anchor.

New retail additions to Downtown should balance the need for boutique and specialty stores with anchors elsewhere in the City (i.e. hardware store, sporting goods store, furniture store, electronics store, pharmacy, large restaurants, etc.).

DOWNTOWN MACON RETAIL GOALS

- EXPAND DOWNTOWN EVENTS TO INCREASE DOWNTOWN FOOT TRAFFIC

  Downtown Macon stakeholders should coordinate on strengthening the impact of existing events that increase both the number of visitors and how much time they spend lingering in Downtown Macon. Nights that the Maples Repertory Theatre has a show and the Fork and Cork Festival are two examples of existing events where this effort could begin. Stakeholders should take the captive audiences that are coming Downtown for these events and encourage them to linger before and after the event by creating and marketing ancillary activities. Create events such as sidewalk sales, monthly evening shopping nights, storefront display contests, etc. that are focused on visitors coming early and leaving late to shop Downtown. In the future, consideration should be given to expanding the calendar of events throughout the year.

- INCREASE BUSINESS RETENTION & EXPANSION

  The Mainstreet Macon Downtown Association, City, and Chamber should coordinate to maintain active relationships with existing retail stores to identify and intervene when a retail business requests help on a challenging issue. Likewise, businesses who are exhibiting considerable growth should be approached regarding expansion or relocation within Downtown Macon. An inventory of available space for lease or buildings for sale should be maintained and marketed. Educational programming should be created to help business owners learn and share their innovative ways to improve their operations, product selection, inventory management, sidewalk presence, in-store design.

- USE TARGETED RETAIL USES AND MIX TO ENCOURAGE FORMATION OF DISTRICTS

  Using the analysis of trade area demographics and retail market trends, Downtown Macon stakeholders should encourage targeted retail uses and appropriate pedestrian generating activities on the ground floor of all mixed-use and commercial buildings with a long-term focus on creating synergy and the formation of districts. A list of targeted retail uses should be developed based on Table 14 and the public input from the Focus Groups, Community Survey, and Visitor Survey. Business attraction activities should focus on drawing a mix of retail uses that complement each other by filling voids within a retail sector. For example, formal wear rental, wedding planning services, jewelry, bakery, bridal boutique are complementary. When they are co-located, they create synergy. It is important to track existing Downtown businesses to monitor available storefronts and track the overall store mix in Downtown. The City should continue to market vacancies and try to fill them with stores from the targeted retail list. The retail and vacancy maps should be consistently updated. The goal is to work towards the recommended store mix to create a vibrant retail destination.

- ESTABLISH AN IMPROVED AESTHETIC FOR DOWNTOWN

  Throughout the public outreach component for the DREAM Initiative, the community and visitors alike expressed a strong desire for Downtown to have improved aesthetics. A more beautiful Downtown creates a more attractive location for dining, shopping, and entrepreneurial investment. The highest priorities across all public input groups were, in order of importance, improved infrastructure, renovation of historic buildings, and landscaping on sidewalks and public spaces. The Building and Streetscape Design Guidelines developed through the DREAM Initiative should be used as a reference tool for establishing an improved, unified aesthetic for Downtown Macon.

DOWNTOWN MACON STRATEGIES

Achieving Downtown's retail goals can be obtained by implementing several key strategies. These strategies must be realistic and based on an understanding of Downtown Macon's current retail market, its primary customers, and the spending potential of key customer segments identified earlier in this analysis. Implementing these strategies will work in concert with other objectives identified through the DREAM Initiative to create a vibrant Downtown Macon.

Re-energizing downtown retail can be a difficult, lengthy and complicated process. Traditional downtowns have changed dramatically in the past decades due to changes in lifestyles, consumer spending patterns, merchandising, and heightened competition for retail and restaurant spending. To achieve long-term success Downtown Macon stakeholders must understand these changes and be willing to embrace new approaches to retail development.

GREAT STREETS EQUAL GREAT DOWNTOWNS

Great neighborhoods and downtowns succeed because of the places and features within them. These small places define a downtown and reveal the richness and depth of its social life. The best downtowns emerge when communities are guided first and foremost by a vision of what they want to see in their downtown. Every neighborhood has the capacity to evolve into a great downtown and destination. This happens when local people feel a sense of ownership, which extends beyond property lines to include private and public partnerships. These partnerships and public involvement have the ability to lift a place from a collection of buildings and spaces to a true community.

Older downtowns, by their very natures, are walkable. They evolved during a period when high density and pedestrians were commonplace. Downtowns can continue to provide an environment where walking can be enjoyable and a practical means of getting around. Great streetscapes become an integral part of the community and provide the means for significant pedestrian presence, which is necessary for a successful retail environment. Downtown should maintain a pedestrian-oriented focus that is conducive to walking between destinations, stores and restaurants. Pedestrian-oriented environments include sidewalks, buffers, street trees, benches, fountains, wayfinding, lighting, public art, and buildings that are interesting and well maintained.

Downtowns should have mixed land uses and extensive pedestrian amenities. Downtowns should have people of all ages moving throughout the district and should have unique identifiable areas such as outdoor seating, water features, and public art. To create great streetscapes that are comfortable and safe and still provide a high quality pedestrian environment, streetscapes should include:

- sidewalks that are continuous and wide enough to include pedestrian-friendly streetscape elements;
- short crosswalk distances that provide safe walking environments;
- symbols that are related to downtown's heritage;
- seamless streetscapes with lighting and banners, planters and street trees, benches and other site furnishings;
- seasonal lighting that helps to create a festive and inviting environment;
- borders that offer variety and stimulate interest in adjacent areas through the use of flower beds, sidewalk seating and cafes, benches and street trees;
- High-quality amenities such as public art, streetscape elements and public amenities such as restrooms;
- safety for pedestrians with lighting, crosswalks, accessible ramps, bike racks, landscape and buffers.
- User-friendly and appealing streetscape features and appropriate directional signage;
- Transit-friendly and convenient integration of cyclists, public transportation, trolleys and automobiles;
- Bicycle-friendly areas with bicycle racks that coordinate with

other site furnishings; directional and regulatory signage that identifies bike routes; wayfinding signage; and, where feasible, dedicated bicycle lanes; and

- continuous on-street parking and enforced slower vehicular speeds

PARKING

There are special issues associated with parking in downtown areas where large numbers of people converge to work, shop, and visit. The lack of parking is frequently cited as a reason for the declining vitality of some downtown businesses. It is important to recognize that parking is intended to serve user needs. In that regard it should be visible, convenient and accessible.

Providing continuous on street parking is a key component in supporting businesses in downtowns, especially central business districts. On-street parking is an efficient means for allowing multiple users to reach several destinations. On-street parking provides a variety of benefits that include among others calming and slowing traffic while providing a buffer for pedestrian traffic. Adequate parking must be available to support businesses and residents. Parking lots are key elements in meeting these needs and should not only provide parking spaces, but be aesthetically pleasing and safe. Planting buffers should be provided at the edges of parking lots to screen the parking. Landscaped islands should be included throughout the lot to improve aesthetics and minimize storm water run-off. A clear and well lit pedestrian pathway and signage that identifies public parking should also be provided.

Establishing parking zones can help ensure there is plentiful customer parking. This can be accomplished by signage that designates parking for customers. Employees and employers should not park in front of the retail establishments in Downtown. Rather, where possible, they should park in the rear of their establishments or at parking lots designated for employee parking.

PUBLIC SPACES

Public spaces are another component to successful downtown destinations. Many public areas suffer from lack of funding, maintenance and planning. Public space revitalization, similar to properly maintained facades and streetscapes, have a direct impact on downtown's economic, environmental, social, and cultural image. Public spaces offer a fundamental amenity to complement businesses and residents and provide a gathering area, meeting place or a place for citizens and visitors to relax. Downtown public spaces should:

- Be easily accessible and visible from the street.
- Preserve and maintain trees and landscaping that provide shade color and natural edges.
- Create a pedestrian-friendly amenity area and activity space for special events. Public spaces should be flexible to accommodate a variety of multi-purpose events.
- Introduce flexible, moveable seating to complement traditional park benches.
- Enforce cleanliness and maintenance standards.
- Provide regulatory park signage and the authority to enforce regulations.
- Be safe.

DOWNTOWN ENVIRONMENT & APPEARANCE

Downtown Macon's historic architectural character and physical layout is the key to its draw as a unique retail environment. Protecting and improving the quality of the built environment must be a major component of the retail development strategy and revitalization plans.

The public and private sectors must continue their partnership to preserve and enhance an environment in which retail can thrive. This will require various means of creative cooperation amongst City staff, and private business and property owners to maximize the impact in

Downtown Macon. New public sector mechanisms such as a Community Improvement District (CID) or Tax Increment Finance District (TIF) may be needed to leverage funding programs or other funds for streetscape, open space and infrastructure improvements. Public sector activity should be aimed at inducing private investment in buildings and sites as part of a comprehensive physical revitalization program. The following items should be Macon's priorities:

- Continued façade restoration and rehabilitation. The City must work to encourage rehabilitation of Downtown buildings.

- Incentive programs should also recognize the need for improvement to the side and rear of buildings, some of which have attractive façades. One advantage of building renovation incentives is that they can be granted with conditions, providing an opportunity to ensure improvements are implemented on the entire building and lot.

- Encourage redevelopment and new construction that adds retail space. Redevelopment opportunities, may arise in coming years as vacant spaces are filled and demand for additional retail and restaurant space grows. As a matter of zoning policy, retail or restaurant uses should be the priority for ground-floor uses in all new buildings. Furthermore, new buildings should generally respect the traditional scale and appearance of existing Downtown buildings.

- Support code enforcement and plan review efforts. The City's code enforcement efforts should be continued and strengthened to ensure that Downtown buildings and sites are properly maintained.

BUSINESS RETENTION, EXPANSION & RECRUITMENT

A formal business retention, expansion and recruitment program is among the most cost-effective initiatives that a community can undertake and implement. Programs designed to assist businesses with expansion, relocation and building improvements can stimulate increased levels of private investment. Efforts should be made to familiarize businesses with local, regional, and state regulations and guidelines, as well as, business assistance and resources.

The City should focus on maintaining goods and services that are currently provided within Downtown Macon. Downtown will also need to attract additional retailers to create a vibrant retail destination. Retail and restaurant locations should be given priority for existing vacant spaces and new construction. The targeted retail establishments were identified in Table 14 on page 23.

A proactive business retention, expansion and recruitment campaign, should be driven by the City and Chamber of Commerce. This campaign should also include existing business within Downtown. The retail recruitment team should encourage specific retail types especially those that are looking to relocate, expand, businesses interested in an additional site and attracting new businesses.

The retail campaign should also take into consideration the needs of the residents and visitors. In addition to identifying new retail uses the campaign should monitor and track all commercial vacancies within Downtown Macon. The campaign should also market itself to the community, surrounding regions and potential businesses. Tools that should be used by the recruitment team include:

- An available Building List that includes an exterior photo, space dimensions, rental rates, contact information, and building amenities. Listings should also suggest the type of business for which the available space is best suited.

- A listing of target businesses to contact. The targets should be limited to retail, restaurants or unique services that would drive traffic and complement the existing business mix.

- A list of local bankers, and real estate agents should also be developed to ensure potential investors have up-to-date information about Downtown.

- A description of any available incentives (e.g. grants, forgivable loans) for tenant improvements, business assistance programs, and rent subsidies.

- Profiles of successful projects implemented by public/private partnerships and testimonials from successful businesses in Downtown.

- Involvement of property owners as part of the solution and development of a strategy that incentivizes the right mix of retail products and amenities.

- Filling vacant storefront windows with paintings, sculpture, or other works of art by local artists.

This campaign should also foster the existing entrepreneurial spirit that exists within the community. Small businesses are the core of the local economy, generating jobs and revenue for the community. Many aspiring business owners are not connected with financial resources, therefore providing technical support and loan opportunities can make a difference whether a business succeeds or fails. This can be accomplished through business plan review and funding opportunities as well as creating a seminar program for local entrepreneurs. Surveying the local businesses to see what topic would best serve the community is another activity that is frequently a benefit for local entrepreneurs. The City should work with local organizations to connect business owners with existing incentives. Some strategies to help Downtown businesses compete with big box stores include:

- Look for voids in the mass merchandisers inventory
- Adjust merchandise selection to sell different brands
- Consider upscale merchandise
- Sell singles instead of multi-pack merchandise
- Focus advertising on competitive advantages
- Emphasize expert technical advice and personalized service

Retail Location & Mix

Location and the appropriate mix of retail is a key to retail success. A well-developed mix of uses throughout Downtown will generate foot traffic and a solid 24-hour population.

Too often the main retail strip in downtowns include uses that are mostly service-oriented. These service-oriented businesses take up valuable sales-generating retail space. Downtown should focus its efforts on creating a continuous retail loop with ground floor space largely dedicated to retail establishments. Pedestrian-friendly loops should be one-quarter mile in length or a five-minute walk.

Anchors are large, well-know attractions that usually draw customers. Usually anchors refer to retail establishments that attract customers, but can also be a single store or establishment, collection of establishments, or a institution. Retail loops should have an anchor located at the beginning and end of the street. Anchors generally include the following types of retail uses:

- Movie Theatres
- Farmer's Markets
- Grocery Stores
- Furniture Stores

To draw customers to Downtown, anchors should be identified, improved and promoted. Developing an anchor has the potential to serve as a year-round draw bringing in large numbers of visitors to Downtown.

When making adjustments to the Downtown retail mix, service and entertainment businesses should be considered. Retail includes shopping and dining attractions. A wide range of shopping should be developed; for example, stores providing products that range from upscale clothing to kitchen gadgets. A wide selection of eating establishments should also be sought; for example, stores from independent coffee shops to full service restaurants. Service uses are also an integral part of successful downtowns, which include medical, legal services and healthcare. Entertainment venues also help to create a successful retail mix. Live music, street festivals, movie theatres and art galleries are included in this category. Creating a variety of retail stores will help Macon become a shopping and entertainment destination.

Promote use of Upper Floor Space

Strong residential presence is a key component to a prosperous downtown. Downtown residents enjoy close proximity to entertainment venues, restaurants, and shopping. These residents have the ability to expand the market by creating additional demand for products and services. Downtown residents also ensure that an area has activity, even when businesses close. There is clear potential to increase residential development through apartments, condos or lofts on the upper floors throughout Downtown. While most upper floor spaces are currently vacant, the City should promote these areas for residential and office space. The City should also provide information regarding projects in other communities who have been successful in enhancing the Downtown residential base.

ENHANCING THE PURCHASING EXPERIENCE

Unique shops thrive when they can work together to create a critical mass. Consumers want a downtown that is safe, clean, and friendly with plenty of variety. The consumer is going to the local shop for the experience of the shop, not the efficiency of buying everyday items.

To effectively compete with local strip commercial centers and big box retailers, Downtown Macon must continue to convey an image and comfort level that welcomes shoppers, diners and casual visitors as well as creating a unique shopping experience. Some ways that unique local shops can capitalize on their strengths include:

- Extend store business hours.
- Carry the unique or higher-end items that can't be found elsewhere.
- Attract dissatisfied customers from the larger retailers.
- Offer expert, personalized assistance and extraordinary customer service.
- Consider shopping amenities like gift wrapping, free shipping, convenient return and exchange policies, recommendations to other area shops and restaurants, and special orders.
- Work smarter by using technology and eliminating wasteful overhead.
- Think like first-time customers walking into a store, ask, "What can I improve?"
- Individual retailers should implement a parking plan that

requires employees to park away from the storefront, freeing up the most convenient on-street parking for customers.

- Use the Retail Store Checklist in Appendix F to help examine the in-store experience

Attracting Customers

Attracting customers is an integral component of retail success. Downtown has established a pool of existing customers and needs to continue to reach-out to new customers. Businesses should use existing customers as a source of referrals, creating a base of repeat customers. To maintain customers and attract new customers, retailers need to provide a unique experience. This can largely be accomplished by providing:

- Friendly customer assistance
- Unique merchandise
- Interesting environment not found elsewhere

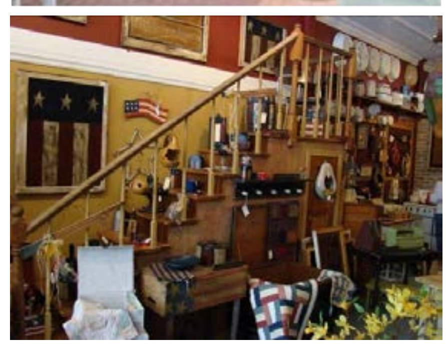
Creating special promotions targeting Downtown employees and residents is an easy way to reward repeat customers while bringing them back Downtown for longer visits on evenings and weekends. While some visitors stop and shop in Downtown Macon, not all visitors do. Increasing the capture rate of visitors is integral to the success of Downtown. This can be accomplished by a focus on marketing, signage, wayfinding and a sense of activity. Downtown business guides and retailer/restaurant profiles should be made available online, at welcome centers, hotels and other shops and restaurants.

Another strategy to increase customer traffic is to extend business hours. Small merchants can find it difficult to stay open into evening hours, but having a critical mass of businesses open for shopping can transform a Downtown into a vibrant, active area. In the retail industry, seventy percent (70%) of all sales tend to occur after 5:30 p.m. and on weekends. Adjusting store hours to respond to changing consumer trends, can help boost sales and create a new experience. Increasing the variety of dining options will provide a broader customer market, usually in the evening hours. One option that many communities have adopted is a weekly or monthly event oriented around shopping, by identifying one coordinated evening a week during which retailers and restaurants stay open late and offer specials (e.g. Thursdays till 8:00 PM or Fridays till 9:00 PM).

Event scheduling can also be extended to perhaps a first Friday or second Saturday; times when area businesses will be more likely to attract regional customers. During these events retailers should coordinate their hours. These are perfect opportunities to provide live music and sidewalk sales. These types of activities will create a festive and exciting atmosphere focused around Downtown. It is important to make the public aware of these special events through all types of marketing.

MARKETING

The promotion of Downtown's attractions, businesses, and events is a major dimension of development. These promotions are generally spearheaded by downtown organizations who recognize the necessity of reacquainting long-time residents and introducing newer residents and visitors to Downtown. Staging Downtown events, festivals, parades, concerts and other special events, will bring more people Downtown and expose them to what Downtown has to offer. The marketing and promotions strategy for Downtown should provide a mix of events and promotions that reflect different aspects of the region, including history, nearby natural amenities, cultural heritage and the quality of goods and services.



The City should continue to utilize brochures that highlight the positive features of locating retail business in Downtown Macon. Brochures that specifically highlight and illustrate the benefits of locating in Downtown should be developed. These brochures should include demographics, retail opportunities and recommended uses targeted at specific locations within Downtown.

It is important that existing shoppers and visitors become aware of existing stores, restaurants and new businesses located in Downtown. A Downtown Directory of business establishments should be distributed to residents and visitors, and placed in existing retail establishments. These brochures should be available at all Downtown establishments, visitor information centers and nearby hotels.

Overall marketing should be increased for Downtown and its retailers. These promotional activities should target residents, the secondary trade area and the overall region. Making the public aware of the wide range of activities and destination is the first step in marketing Downtown. Local store and restaurant owners and employees should refer their customers to visit other shops Downtown. This can also be accomplished by locating current downtown directories at check-out and waiting areas.

Shared advertising (e.g. newspaper ads promoting multiple businesses) can be beneficial for Downtown businesses for several reasons. Whether print or electronic media, shared ads promoting numerous businesses help build an image of Downtown as a place with multiple shopping opportunities. It can also make advertising more affordable and allow smaller businesses to use advertising media they might not otherwise use. Downtown cross-promotion efforts could be expanded to include businesses located elsewhere in Macon, especially those businesses that might draw customers or visitors from a wider geographic area.

Collectively advertising Downtown businesses and their promotions and events should be consistently updated on social media. Channels such as Facebook and Twitter are major components of today's new 'public square' where information is quickly and widely shared. This is particularly relevant to younger generations.

The long-term success of Downtown redevelopment efforts will depend in part on the quality of marketing and promotional activities, as well as the ability of the Downtown leadership to appeal to specific customer segments identified earlier in this document. Creating a mix of businesses that provide for a variety of experiences allows Downtown to become marketable to residents and visitors of many incomes and lifestyles.

Retail Presentation & Operations

The appearance of a retail store is essential to the success of that business. A store's appearance begins at the sidewalk and continues to the storefront, entrances and windows. Stores must appear interesting and inviting at the sidewalk.

Simple additions of planters that flank the doorway or window boxes, add color and life to the street. Pedestrians may be stopped by a plant, bench or signage, attracting them to the window display. Grabbing the attention of the customer is the first step in bringing them into the shop. Keep the appearance of the sidewalk and storefront neat and clean. The store should also be clearly identified with signage and be as inviting as possible.

The overall appearance of the storefront is also critical. The entrance door should be recessed from the sidewalk to emphasize the entry, provide shelter and remove the open door from the path of pedestrians on the sidewalk. The entrance should also be ADA compliant. The door should provide a view into the building as well as a sense of openness. The front entrance is not the only opportunity, rear entrances may also provide viable entrances to retail and restaurant establishments. Rear entrances should be as inviting and appealing as the main entry.

After evaluating the curb appeal and storefront of each business the window displays must be considered. Shoppers learn everything about a store at the window. They act as a store's billboard that announces the brand and character of the product within. A positive tone should be set by the windows. Great window displays will help lure customers into the store. If a pedestrian stops in front of a store window, they are one step closer to entering the shop.

Corner storefronts are significant. When these windows are vacant they discourage pedestrians from crossing to the next corner. If there are vacant corner storefronts The City should encourage rotating displays from other stores, or inserting information on upcoming festivals and local artwork.

Window "How-To's"

Window displays must grab the attention of the pedestrian so they will be drawn in. The following points describe possible alternatives for window displays:

- Develop Themes. Window displays should establish a theme and integrate props. They can follow the general items in the store or a specific set of items such as sports, children's stories, romance, nature, patriotism, or storytelling.

- Simple Repetitive Objects. Repeating objects creates a strong message. They do not need to be expensive to be successful. Simple objects such as cut out hearts, gloves. Lampshades, balloons or handwritten notes can create dynamic and rhythmic displays.

- Found Objects. These objects can be window frames or wine barrels to reinforce the window statement.

- Flexible Backdrops. They can be textured or fabric panels reflecting the products displayed, highlighting the season or the richness of the interior that is found beyond the windows.

- Window Graphics. Graphic statements can define a function or add interest to the merchandise.

- Night Lighting. Once window displays are lighted they add life to the evening streetscape and act as a 24-hour billboard. People leaving nearby businesses, such as restaurants, theaters and drinking establishments will be compelled to visit later. However, window lighting should not impose on upper-story residents

- Change Window Displays. Displays should be rotated every four to six weeks.

- Reference the Retail Store Checklist in Appendix F to examine window appearance

SIGNAGE AND BRANDING

Business owners must decide on their brand and how they hope to be perceived by customers. These decisions determine the store logos, signage, and interior design. Colors and font type should reflect the brand and merchandise. Brand logos should be used consistently on merchandise, hang tags, business cards and printed advertisements. Shopping bags are walking advertisements that reinforce your style and should always include your shop logo.

Interiors

Retail establishments should have flexible features so the store can reinvent itself when necessary. Interior layouts have several common components:

- *Feature Displays*. Once a customer has entered the interior of the shop, there should be an open area to adjust to their surroundings and make decisions.

- *First Fixture*. The first fixture should be well inside the entrance and is often a feature display which tells a story about a specific theme or product. These displays can be seasonal or a specialty product line.

- *Music*. Music should be played that matches the store image. This simple step will bring an empty store to life.

- *Secondary Displays*. These displays keep the customer moving, and successful displays encourages movement. This is accomplished by placing a variety of minor merchandise groups throughout the space. The height and shape of these displays should vary and interrupt long runs of repeating products on walls.

- *Floor Space*. The area 18" from the floor is not "shop-able" and is best used for storage. (*See image to the right.)*

- *Make the Back Wall Visible*. Making the back wall visible and interesting all the way from the front of the store to draw customers back. This can be as easy as using paint or unusual fixtures. Place sale or clearance merchandise in the back to make customers walk past other items to get to there.

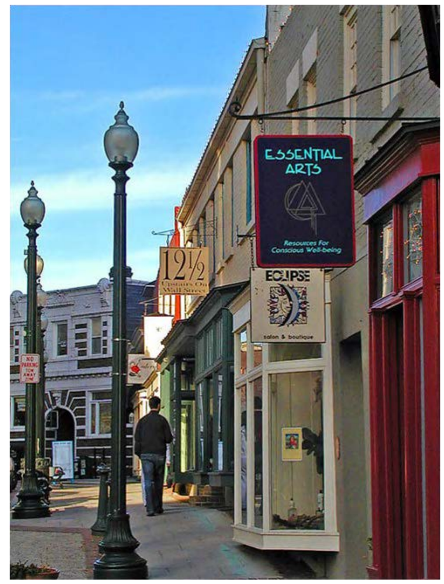
- *Grouping Merchandise*. Techniques for grouping the merchandise can help shoppers make their decisions faster and therefore buy more merchandise while they are in the store. Some methods include:
  ⇒ By Color. Group all red items together, blue items

together, etc. This is often used for seasonal items.

⇒ Product Combination. These items provide opportunities for customers to purchase combined products with a similar theme. Group clothing with coordinating accessories or "Staff Favorites."

⇒ Fabrication Type. All glass should be kept with the glass, wood with wood, pewter with pewter and pottery with pottery.

⇒ Impulse Items. These are often located by the register and are generally offered as inexpensive add-ons to the primary purchase.



Give customers the opportunity to learn about merchandise, provide customers information about special products and offer samples. All retailers should keep counters clean and clutter free. Showcases and display cases should be well-lit.

A downtown map and business directory should be located at each register. This will encourage shoppers to visit neighboring stores and help visitors navigate downtown. The store should be viewed from the customers viewpoint and these following concepts should be kept in mind.

- Signage should reflect the brand.
- Entrance and windows must be appealing.
- Merchandise must be useful or unique.
- Focal points and product placement must be able to keep their interest.

The combined attention a store's image receives from the street, its signage, storefront, window displays, entrances and interior, and to customer service all work harmoniously to create a positive experience. This experience will remain with the visitor long after they leave the store and entice them to return as loyal customers.

IMPLEMENTATION

This Retail Market Analysis Report has identified a wide range of goals and strategies, based upon an analysis of the demographic and economic trends driving Macon's retail market. The implementation of these goals and strategies will be included in the DREAM Downtown Strategic Plan and will include integration with other aspects of Downtown such as funding sources, design concepts, and marketing.

Key steps for achieving the goals in this Retail Market Analysis include:

- **Implement other Key DREAM Recommendations**
  - The recommendations found in the Organizational Structure Review, Destination Assessment, Building Design Concepts, and Financial Assistance Review are critical for Downtown to fully capitalize on the surrounding retail market.

- **Expand Downtown Events to Increase Downtown Foot Traffic**
  1. Assess calendar of current events including Maples Theatre shows that have a regional draw.
  2. Brainstorm marketing and promotional initiatives to increase visitor attendance where possible.
  3. Brainstorm ancillary programming surrounding events to increase the 'staying power' of events for visitors. Extended business hours, cross-promotions, and other tactics to incent the visitor to lengthen their stay in Downtown Macon.
  4. With available resources, consider innovative new events to expand the calendar of events to drive more traffic.
  5. Measure attendance of events and increased traffic. Reassess and adjust initiatives as needed.

- **Increase Business Retention & Expansion**
  1. Compile a contact sheet of current business owners, property owners, and real estate brokers.
  2. Consider creating a call program to keep lines of communication open and active with all businesses and property owners.
  3. Assemble incentives, programs, available space , and other resources for businesses who may need assistance with store improvements, expansions, relocations, lease renewals, or improving operations.
  4. Keep measurements of businesses assisted, vacancies filled, leases renewed. Benchmark performance year to year and reassess program as needed.

- **Use Targeted Retail Uses and Mix to Encourage Formation of Retail Districts**
    1. Reference the high growth retail sectors in Table 14 on page 23 and the public preferences for new businesses on page 17.
    2. Review the suggested Downtown areas on pages 23 through 25 that may be appropriate for each high growth retail sector.
    3. Be prepared to encourage and seek retail operators within each high growth retail sector and steer them toward locating their business in the appropriate area in Downtown Macon.
    4. Consider any of the following with new business locations:
        - Does the new business complement the services or products of existing businesses? (e.g., formal wear, floral, jewelry, bridal boutique, bakery)
        - Does the new business extend activity beyond normal business hours in the area? (e.g., restaurants with lunch and dinner hours, bars, music venues, coffee shops, diners)
        - Does the business contribute toward the creation of a distinct retail district? (e.g., Arts/Design—florist, arts and crafts, specialty clothing boutique, frame shop, designer home furniture and furnishings, art gallery OR Entertainment—theatre, bar, nightclub, fine dining restaurant, comedy club, music venue)
    5. Be flexible and encourage neighborhood-serving retail and services that may not fit a district identity. Downtown residents don't care where dry cleaners, coffee shops, or pizza parlors are as long as they are conveniently located!

- **Establish an Improved Aesthetic for Downtown**
    1. Explore and establish the creation of a Community Improvement District as per the recommendation of the Organizational Structure Review. The revenue from a CID can be utilized for a host of benefits for Downtown Macon including public improvements to sidewalks.
    2. As identified through the Community Survey, coordinate with the City to improve infrastructure: repair broken sidewalks, improve wayfinding signage, bury utility lines.
    3. Use proactive community input events like the Better Block project to reimagine areas of Downtown challenged with deferred maintenance or significant alterations. (http://betterblock.org/)
    4. Reference Building and Streetscape Design Guidelines to help inform restoration of historic building facades and landscaping improvements.

APPENDIX

Appendix A-1
Downtown Macon

Retail Market Analysis
City of Macon, Missouri

Legend

DREAM Boundary

0 125 250 500
Feet

N

March 2012

D·R·E·A·M INITIATIVE

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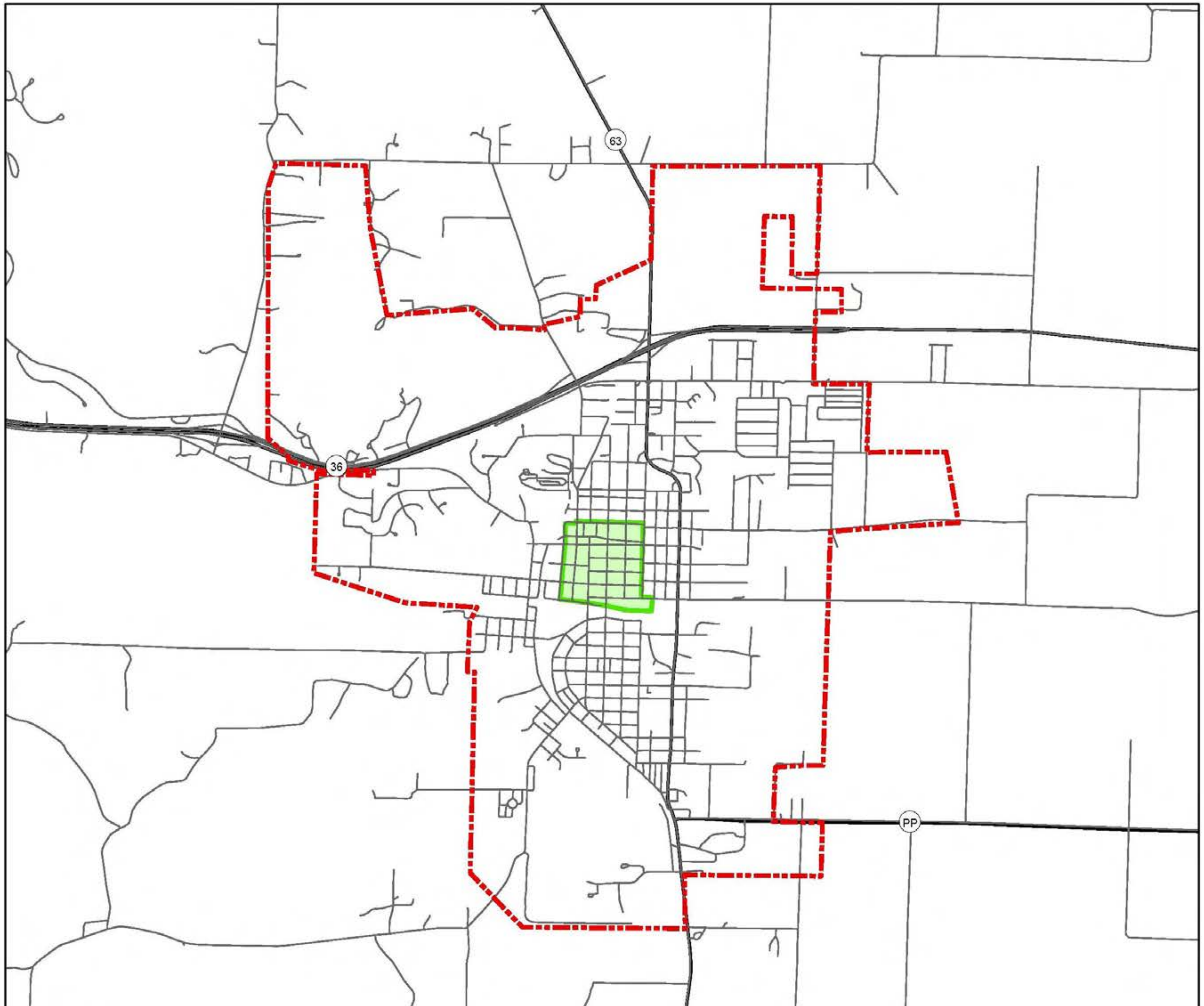
Appendix A-2
Primary Trade Area

Retail Market Analysis
City of Macon, Missouri



Legend

Primary Trade Area
DREAM Boundary

0 1,200 2,400 4,800
Feet

N

March 2012

D·R·E·A·M
INITIATIVE

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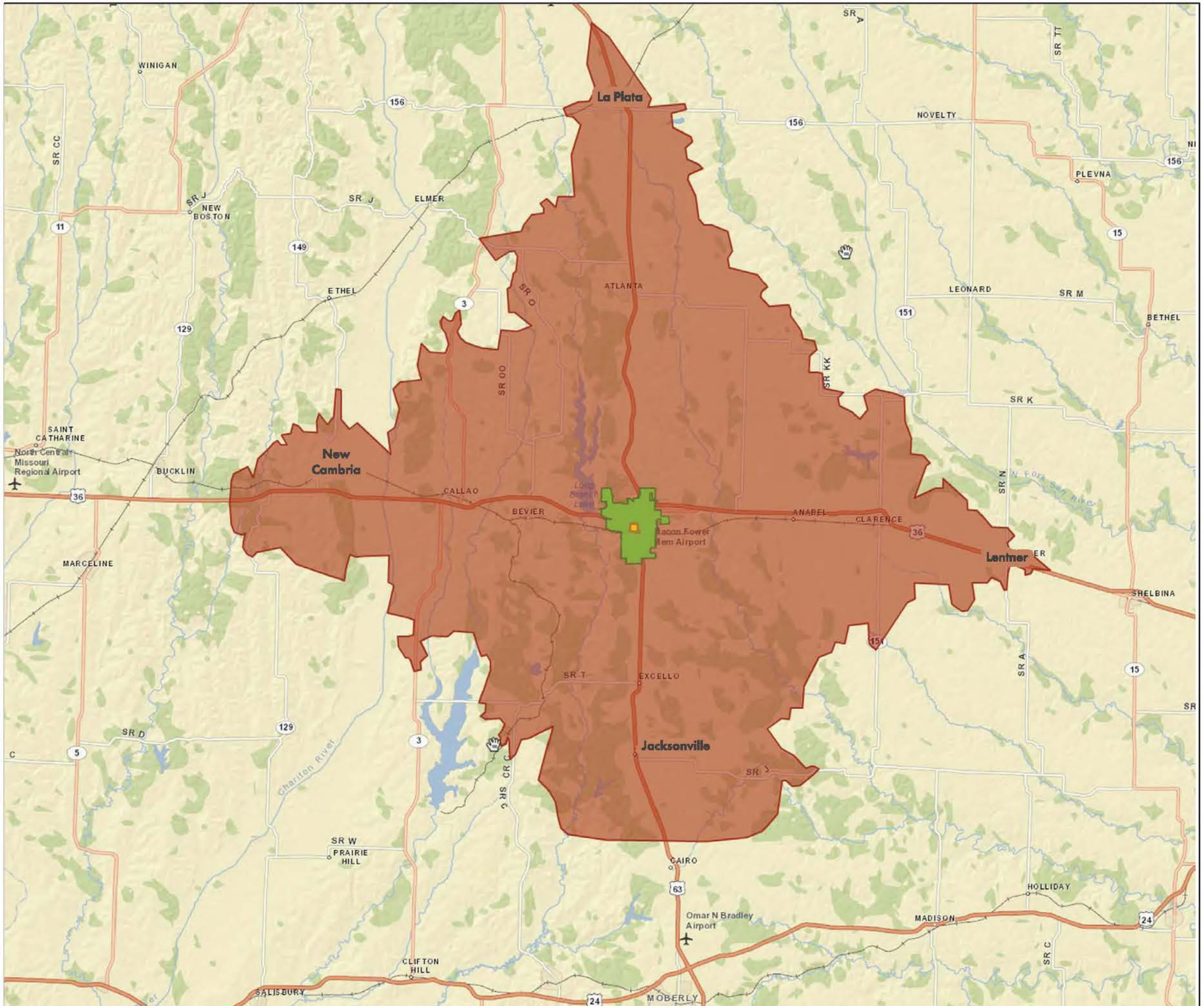
Appendix A-3
Secondary Trade Area

Retail Market Analysis
City of Macon, Missouri



Legend

- DREAM Boundary
- Primary Trade Area
- Secondary Trade Area

D·R·E·A·M INITIATIVE

October 2012

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Appendix B

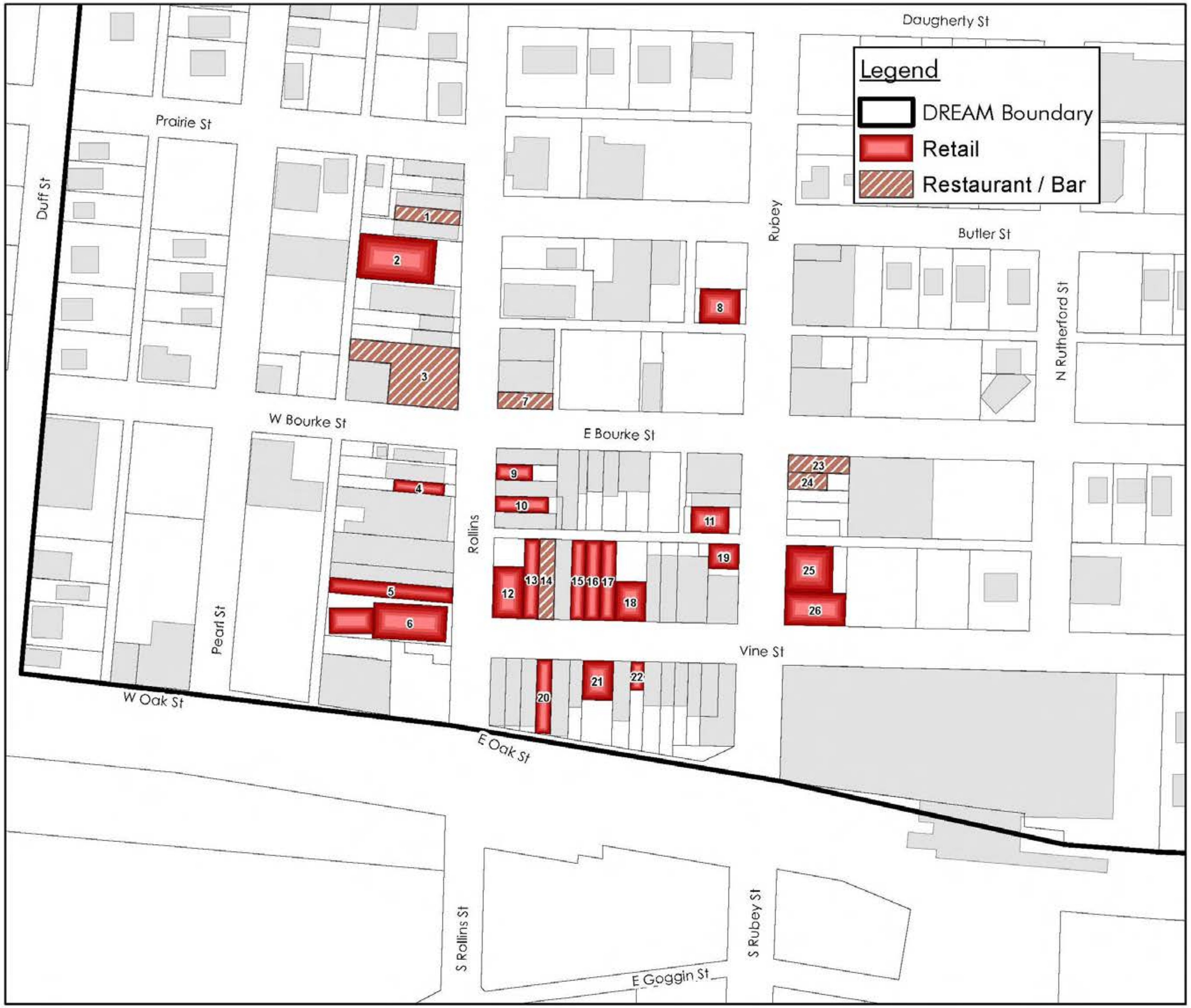
Downtown Macon DREAM Study Area
Retail Demand & Sales

Industry Group	Secondary Trade Area Demand	STA Businesses	STA Total Retail Sales	STA Gap	Potential Square Footage	STA Per Capita Demand	City Retail Demand	City Businesses	City Total Retail Sales	Downtown Total Retail Sales[2]	Downtown Businesses[2]	Downtown Trade Area Capture	Downtown Pull-factor
Total Retail Trade and Food & Drink (NAICS 44-45, 722)[1]	**$67,787,215**	**122**	**$59,416,785**	**$ 8,370,430**	**174,066**	**4,336**	**$24,332,078**	**75**	**$43,481,265**	**$7,449,734**	**19**	**1,718**	**4.04**
Total Retail Trade (NAICS 44-45)	**$52,982,906**	**81**	**$52,301,286**	**$ 681,620**	**5,440**	**3,389**	**$18,925,722**	**51**	**$39,272,338**	**$6,855,381**	**14**	**2,023**	**4.76**
Total Food & Drink (NAICS 722)	**$14,804,308**	**41**	**$7,115,499**	**$ 7,688,809**	**168,626**	**947**	**$5,406,356**	**24**	**$4,208,927**	**$594,353**	**3**	**628**	**1.48**
Furniture & Home Furnishings Stores (NAICS 442)	$2,216,803	7	$1,728,639	$ 488,164	3,896	142	$793,492	7	$1,664,876	$678,813	3	4,787	11.26
Furniture Stores (NAICS 4421)	$1,555,947	5	$1,260,343	$ 295,604	2,359	100	$535,549	5	$1,260,343	$626,116	2	6,290	14.80
Home Furnishings Stores (NAICS 4422)	$660,856	2	$468,296	$ 192,560	1,537	42	$257,943	2	$404,533	$52,698	1	1,247	2.93
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$2,204,059	5	$605,071	$ 1,598,988	12,761	141	$763,495	5	$605,071	$162,270	1	1,151	2.71
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$3,632,442	11	$1,730,550	$ 1,901,892	15,179	232	$1,236,091	7	$1,306,040	$505,123	2	2,174	5.11
Building Material and Supplies Dealers (NAICS 4441)	$3,193,783	9	$1,383,457	$ 1,810,326	14,448	204	$1,095,144	6	$1,118,031	$505,123	2	2,472	5.82
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$438,659	2	$347,093	$ 91,566	731	28	$140,947	1	$188,009	$0	0	0	0.00
Food & Beverage Stores (NAICS 445)	$19,700,465	15	$23,477,428	$ (3,776,963)	(30,143)	1,260	$7,117,260	6	$14,120,657	$25,269	0	20	0.05
Grocery Stores (NAICS 4451)	$19,287,742	13	$23,106,254	$ (3,818,512)	(30,475)	1,234	$6,965,124	5	$14,046,534	$0	0	0	0.00
Specialty Food Stores (NAICS 4452)	$338,730	1	$297,051	$ 41,679	333	22	$123,590	0	$0	$0	0	0	0.00
Beer, Wine, and Liquor Stores (NAICS 4453)	$73,993	1	$74,123	$ (130)	(1)	5	$28,546	1	$74,123	$25,269	0	5,338	12.56
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$3,559,161	6	$3,160,178	$ 398,983	3,184	228	$1,187,563	3	$1,719,381	$716,106	1	3,145	7.40
Clothing and Clothing Accessories Stores (NAICS 448)	$1,634,156	4	$604,342	$ 1,029,814	8,219	105	$617,560	4	$604,342	$375,001	2	3,587	8.44
Clothing Stores (NAICS 4481)	$1,306,144	3	$501,066	$ 805,078	6,425	84	$496,911	3	$501,066	$294,279	1	3,522	8.29
Shoe Stores (NAICS 4482)	$45,102	0	$0	$ 45,102	360	3	$10,457	0	$0	$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$282,910	1	$103,276	$ 179,634	1,434	18	$110,192	1	$103,276	$80,722	1	4,460	10.49
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$1,367,482	7	$675,909	$ 691,573	5,519	87	$464,259	3	$365,953	$18,713	0	214	0.50
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$799,952	6	$468,601	$ 331,351	2,644	51	$280,841	3	$365,953	$18,713	0	366	0.86
Book, Periodical, and Music Stores (NAICS 4512)	$567,529	1	$207,307	$ 360,222	2,875	36	$183,418	0	$0	$0	0	0	0.00
General Merchandise Stores (NAICS 452)	$17,371,762	7	$19,302,012	$ (1,930,250)	(15,405)	1,111	$6,281,593	6	$18,328,788	$4,214,189	2	3,792	8.92
Department Stores Excluding Leased Depts. (NAICS 4521)	$9,662,605	3	$9,083,009	$ 579,596	4,626	618	$3,496,548	3	$9,083,018	$84,855	1	137	0.32
Other General Merchandise Stores (NAICS 4529)	$7,709,157	4	$10,219,003	$ (2,509,846)	(20,030)	493	$2,785,045	3	$9,245,770	$4,129,334	1	8,373	19.70
Miscellaneous Store Retailers (NAICS 453)	$1,296,578	18	$1,017,157	$ 279,421	2,230	83	$464,409	10	$557,230	$159,896	3	1,928	4.54
Florists (NAICS 4531)	$296,939	5	$377,523	$ (80,584)	(643)	19	$100,301	3	$271,642	$68,841	1	3,624	8.53
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$245,771	1	$102,101	$ 143,670	1,147	16	$83,170	0	$0	$0	0	0	0.00
Used Merchandise Stores (NAICS 4533)	$113,778	7	$132,003	$ (18,225)	(145)	7	$44,296	3	$49,205	$14,901	1	2,047	4.82
Other Miscellaneous Store Retailers (NAICS 4539)	$640,090	5	$405,530	$ 234,560	1,872	41	$236,642	4	$236,383	$76,155	1	1,860	4.38
Food Services & Drinking Places (NAICS 722)	$14,804,308	41	$7,115,499	$ 7,688,809	168,626	947	$5,406,356	24	$4,208,927	$594,353	4	628	1.48
Full-Service Restaurants (NAICS 7221)	$6,076,606	24	$2,879,940	$ 3,196,666	70,107	389	$2,077,799	10	$1,426,657	$140,907	1	362	0.85
Limited-Service Eating Places (NAICS 7222)	$4,654,246	8	$2,162,092	$ 2,492,154	54,656	298	$1,695,806	8	$2,162,092	$284,204	1	955	2.25
Special Food Services (NAICS 7223)	$3,359,451	3	$1,373,619	$ 1,985,832	43,552	215	$1,348,911	2	$190,194	$21,227	0	0	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	$714,006	6	$699,848	$ 14,158	311	46	$283,840	4	$429,984	$148,014	2	3,241	7.62

[1] Totals in these categories do not include Auto Sales, Gas Sales, or Non Store Retailers

Appendix C
Retail Locations

Retail Market Analysis
City of Macon, Missouri



ID	Retail Location
1	Apple Basket Café
2	Helton Appliance
3	Ole Beaumont
4	Frank's Jewelry
5	Ben Franklin
6	Ben Franklin
7	Wooden Nickel
8	N&B Auction Service
9	Long Branch Embroidery
10	Sherry's Flowers
11	Lou Lou's
12	JP's Corner Market
13	West Mercantile Fine Books & Antiques
14	West Winery
15	Sim's Jewelry
16	Barry's Carpet
17	Miller's Recall Drug
18	Barry's Carpet
19	Used Thrift Store
20	Macon Frames
21	The Junction Shop
22	Red Door
23	Bojangles
24	Downtown Eatery
25	Maples Theatre
26	Maples Theatre

0 75 150 300
Feet

N

October 2012

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Appendix D
1st Floor Vacancies

Retail Market Analysis
City of Macon, Missouri

ID	Address	Available Sq.Ft.
1	203 Oak Street	1,100
2	217 N. Rollins Street	1,650
3	215 N. Rollins Street	1,700
4	211 N. Rollins Street	4,000
5	203 N. Rollins Street	4,600
6	117 N. Rollins Street	1,700
7	113 N. Rollins Street	8,300
8	103 Oak Street	6,650
9	106 Butler Street	9,200
10	105 E. Bourke Street	1,600
11	120 N. Rollins Street	1,700
12	116 N. Rollins Street	1,800
13	112 N. Rollins Street	1,750
14	104 E. Bourke Street	3,050
15	108 E. Bourke Street	1,160
16	110 E. Bourke Street	1,250
17	111 N. Rubey Street	4,000
18	113-115 N. Rubey Street	1,200
19	109 N. Rubey Street	900
20	109 Vine Street	2,400
21	121 Vine Street	1,700
22	123 Vine Street	2,000
23	131 Vine Street	2,650
24	104 Vine Street	1,900
25	106 Vine Street	1,900
26	110 Vine Street	2,400
27	118 Vine Street	1,900
28	122 Vine Street	1,400
29	124 Vine Street	1,050
30	126 Vine Street	1,050
31	130 Vine Street	1,650
32	132 Vine Street	3,500
33	218 N. Rubey Street	1,250
34	218 N. Rubey Street	1,900
35	212 N. Rubey Street	7,500
36	210 N. Rubey Street	1,700
37	202 N. Rubey Street	5,250
38	211 E. Bourke Street	1,950

0 65 130 260
Feet

N

October 2012

D·R·E·A·M
INITIATIVE

PGAV PLANNERS

Appendix E
Parking Inventory
Number of Spaces

Retail Market Analysis
City of Macon, Missouri

Legend

- DREAM Boundary
- 11-20
- 21-30
- 31-40
- 41-50

0 125 250 500
Feet

N

October 2012

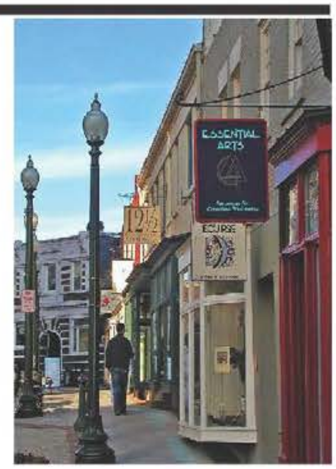
D·R·E·A·M

PGAV PLANNERS

Existing Store Checklist

Exterior

Storefront:



- Check Overall Condition, are repairs needed?

☐ Yes

☐ No

☐ Renovation/Remodel Preferred

Description

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- Is new paint needed?

☐ Yes

☐ No

- Does the paint match the store brand/logo?

☐ Yes

☐ No

Description

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- Is the storefront generally clean?

☐ Yes

☐ No

Description

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- Are planters or window boxes placed to frame the entry?

☐ Yes

☐ No

Existing Store Checklist

Storefront:

- Are there hazards in front of the storefront?

☐ Yes

☐ No

Description

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- Is the sidewalk clean and level?

☐ Yes

☐ No

Description

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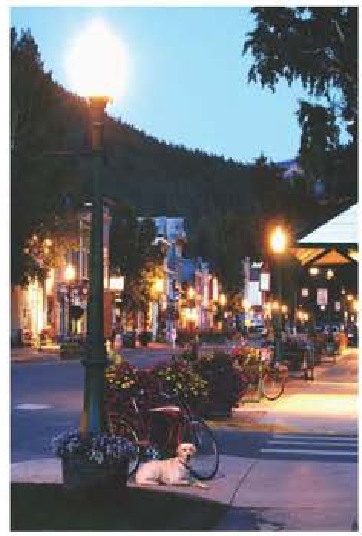

Exterior Signage:

- Does signage occur at eye level (Pedestrian)?

☐ Yes

☐ No

Description

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- Does signage occur at car level (Driver)?

☐ Yes

☐ No

Description

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INITIATIVE

Existing Store Checklist

Exterior Signage:

- Do wall signs obstruct the architecture?

☐ Yes
☐ No
Description

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- Is signage maintained in good condition?

☐ Yes
☐ No
Description

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- Does the signage complement the building and area?

☐ Yes
☐ No
Description

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- Are the exterior signs lighted (at night)?

☐ Yes
☐ No
Description

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INITIATIVE

Existing Store Checklist

Display Windows:

- What is the condition of props and goods? Are they faded?

Description

- Are window displays rotated every 4-6 weeks?

☐ Yes

☐ No

- Do the displays effectively represent the store brand?

☐ Yes

☐ No

- Are displays including the best/most poplar products?

☐ Yes

☐ No

Description

- If it's a corner shop window, do the window displays encourage the pedestrian to cross the street to your block?

☐ Yes

☐ No

Description

- Are the window displays lit at night?

☐ Yes

☐ No

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INITIATIVE

Existing Store Checklist

Interior

Flooring:

- Is the floor worn/hazardous/slippery?

  ☐ Yes

  ☐ No

- Is the floor clean?

  ☐ Yes

  ☐ No

- Is there a 5-10' area without store fixtures at the entry?

  ☐ Yes

  ☐ No

- Is there a walk off area to clean shoes?

  ☐ Yes

  ☐ No

  Description

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Ceiling:

- Is the finish in good condition (stained/missing tiles/peeling paint)?

  ☐ Yes

  ☐ No

  Description

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- Is the HVAC duct work clean?

  ☐ Yes

  ☐ No

Existing Store Checklist

Ceiling:

- Are there any other distracting issues?

Description

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Lighting:

- Is the lighting adequate to show the merchandise?
  - ☐ Yes
  - ☐ No
- Is the bulb type appropriate (fluorescent or incandescent)?
  - ☐ Yes
  - ☐ No
- Are the bulbs the same type?
  - ☐ Yes
  - ☐ No
- Does the lighting design match the rest of the interior style?
  - ☐ Yes
  - ☐ No

Description

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- Are there adjustable lights to create focal points?
  - ☐ Yes
  - ☐ No

Description

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D·R·E·A·M INITIATIVE

Existing Store Checklist

Interior Colors:

- Are the interior finishes (painting, wall coverings, paneling, etc.) in good condition?

  ☐ Yes

  ☐ No

  Description

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- Are the paint and finish colors consistent with the brand/ logo?

  ☐ Yes

  ☐ No

  Description

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- Are the paint colors consistent from fixture to fixture?

  ☐ Yes

  ☐ No

  Description

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Circulation:

- Does the foot traffic flow smoothly?

  ☐ Yes

  ☐ No

  Description

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Existing Store Checklist

Circulation:

- Is the intended path clear to customers?
  - ☐ Yes
  - ☐ No
- Are off-limit areas clear to the customer?
  - ☐ Yes
  - ☐ No
- Are there slow pockets of merchandise that receive little attention?
  - ☐ Yes
  - ☐ No

  Description

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Cash Wrap/Register:

- Is the cash wrap area in good condition?
  - ☐ Yes
  - ☐ No
- If there's a showcase, is the lighting adequate?
  - ☐ Yes
  - ☐ No
- Is it easy for customers to locate where to cash out?
  - ☐ Yes
  - ☐ No
- Is the floor area clear to assure ease in purchasing?
  - ☐ Yes
  - ☐ No
- Is the counter top clutter-free?
  - ☐ Yes
  - ☐ No
- Is the location appropriate (it should not occupy prime real estate)?
  - ☐ Yes
  - ☐ No

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INITIATIVE

Existing Store Checklist

Cash Wrap/Register:

- Are the views of the shop and exits open enough for security?

  ☐ Yes

  ☐ No

- Is there fixture nearby for impulse purchases?

  ☐ Yes

  ☐ No

  Description

Fixtures & Equipment:

- Does the fixture style match the brand or logo?

  ☐ Yes

  ☐ No

- Is there a range of heights and sizes to keep the eye moving?

  ☐ Yes

  ☐ No

- Is the un-shoppable high area (72") used for display?

  ☐ Yes

  ☐ No

- Is the un-shoppable low area (18") un-stocked and/or used for storage?

  ☐ Yes

  ☐ No

  Description

Merchandising:

- Are the products restocked or re-arranged consistently to make the store feel full?

  ☐ Yes

  ☐ No

D·R·E·A·M INITIATIVE

Existing Store Checklist

Merchandising:

- Are the displays group by color, material or product brand?

  ☐ Yes

  ☐ No

- Does the product inventory match the internet site?

  ☐ Yes

  ☐ No

  Description

- Is there a feature fixture near the entry that tells the story of the store's overall brand and product style?

  ☐ Yes

  ☐ No

  Description

Cleanliness:

- Is the store clean?

  ☐ Yes

  ☐ No

  Description

- Are boxes cleared and out of sight?

  ☐ Yes

  ☐ No

- Are the views into off limits areas blocked?

  ☐ Yes

  ☐ No

D·R·E·A·M
INITIATIVE

Existing Store Checklist

Cleanliness:

- Are the signs and product pricing professional, consistent in type and not hand made?
  - ☐ Yes
  - ☐ No

  Description

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Comfort:

- Is the shop a comfortable temperature?
  - ☐ Yes
  - ☐ No
- Are the entry doors easy to open and close?
  - ☐ Yes
  - ☐ No
- Are the displays and fixtures stable?
  - ☐ Yes
  - ☐ No
- Is music incorporated to make the store feel occupied?
  - ☐ Yes
  - ☐ No
- Does the music reflect the store brand?
  - ☐ Yes
  - ☐ No

Dressing Rooms:

- Is there a bench, wall hook and mirror?
  - ☐ Yes
  - ☐ No
- Are the doors secure and is privacy addressed?
  - ☐ Yes
  - ☐ No
- Are non-selected items returned to stock quickly?
  - ☐ Yes
  - ☐ No

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Existing Store Checklist

Dressing Rooms:

- Are the rooms placed to discourage shoplifting?

☐ Yes

☐ No

Staff:

- Is the staff helpful and cheerful?

☐ Yes

☐ No

Description

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- Is the staff educated about the merchandise?

☐ Yes

☐ No

Description

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- Does the staff suggest other downtown shops to the customers?

☐ Yes

☐ No

Description

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Other Comments.

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