Strafford, Missouri

DOWNTOWN
REVITALIZATION &
ECONOMIC
ASSISTANCE FOR
MISSOURI

RETAIL MARKET ANALYSIS

OCTOBER 2012

DOWNTOWN REVITALIZATION AND ECONOMIC ASSISTANCE FOR MISSOURI
D·R·E·A·M INITIATIVE

PGAV PLANNERS

ACKNOWLEDGMENTS

CITY OF STRAFFORD, MISSOURI

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D·R·E·A·M INITIATIVE

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EXECUTIVE SUMMARY

Strafford is a friendly bedroom community located on historic Route 66 five miles east of Springfield, Missouri with a good K-12 education system and family outdoor recreation. While Strafford residents are proud of their hometown for its history and quiet sense of community, they find Downtown Strafford challenged with a lack of retail and dining opportunities. A large part of this challenge comes from the strong regional pull of the retail market in nearby Springfield. Residents from communities around the area, including Strafford, regularly travel to Springfield to dine in its restaurants and shop at its big box stores, mall, and other shopping options. What has resulted is a Downtown lacking retail and dining options in Springfield's long shadow.

The intent of this Retail Market Analysis is to be a first step toward revitalizing Downtown Strafford's retail market. Analysis of the existing retail market, demographic trends of Strafford trade areas, and surveys gathering public input were utilized in defining a strategy. A review of the DREAM Land Use, Building, and Infrastructure Survey (see Table 9 on page 15) reveals Downtown Strafford has 14,654 square feet of existing usable first-floor space:

- 2,410 square feet of restaurant space (1,000 square feet vacant)
- 12,244 square feet of retail space (3,000 square feet vacant)

The 10,700 square feet of occupied retail/restaurant space is generating $1.5 million in sales annually (sales do not include auto dealers, gasoline stations or non-store retailers). The retail component of this space is generating sales of $150 per square foot. Restaurant sales average $350 per square foot. However, this is extremely high given the very few eating and drinking establishments within the DREAM Study Area, so a $250 sales per square foot average will be used in this report. Using these averages, the 4,000 square feet of retail/restaurant vacancy represents between $600,000 and $1 million in potential additional annual sales to Strafford.

The primary opportunity for increasing these potential retail sales in Downtown Strafford rests in leveraging its location just outside of Springfield and its connection to historic Route 66 that runs through the heart of the community. Strengthening and promoting the City's connection to historic Route 66 can help drive traffic and intimately tie the Downtown Strafford experience with the iconic roadway of American car culture. As Strafford's own residents drive to Springfield to shop, so do other nearby communities east of Springfield. The analysis of the unmet retail demand Strafford's Secondary Trade Area (STA) reveals retail sectors that may be tapped for new boutique retail. The intent is to focus Strafford's retail attraction effort toward these retail sector opportunities in the hope of capturing shoppers from this area.

Table 14 on page 19 in the report lists the retail areas for potential growth in Downtown Strafford. The retail goods and services are classified according to the North American Industry Classification System (NAICS) in industry groups. The top ten retail sectors in the Secondary Trade Area with market opportunity, expressed in dollars, are shown below:

- Limited-Service Eating Places (NAICS 7222) $6,098,081
- Electronics & Appliance Stores (NAICS 443/NAICS 4431) $3,308,046
- Full-Service Restaurants (NAICS 7221) $3,001,254
- Clothing Stores (NAICS 4481) $2,376,979
- Furniture & Home Furnishings Stores (NAICS 442) $2,243,886
- Other Miscellaneous Store Retailers (NAICS 4539) $743,131
- Special Food Services (NAICS 7223) $739,559
- Health & Personal Care Stores (NAICS 446/NAICS 4461) $736,897
- Drinking Places - Alcoholic Beverages (NAICS 7224) $444,005
- Office Supplies, Stationery, and Gift Stores (NAICS 4532) $391,430

The total unmet demand in the STA represents $21 million dollars in potential additional sales for Strafford and translates to just over 132,000 square feet of retail space. While this market opportunity is not likely to be attained, it does illustrate the amount of demand that exists, a portion of which Downtown Strafford could capture.

BACKGROUND & METHODOLOGY

This report analyzes market conditions in and around Downtown Strafford in order to identify appropriate retail sectors for Downtown stakeholders to target for expansion and attraction. The report generally consist of four components;

1) a review of current and anticipated trends in trade area demographics;
2) an analysis of existing trade area business mix;
3) identification of potential retail sectors to target; and
4) recommendations of retail development strategies and implementation to achieve goals.

As a component of other DREAM Initiative activities, surveys were conducted of business owners, City staff, residents and visitors which provide key insights into desired Downtown Strafford improvements and retail services. Additionally, a thorough review of future residential demand for the trade area has been conducted in the *Residential Demand Analysis*. A physical examination of the trade area and surrounding region provides insight into the traffic and pedestrian patterns, as well as identify the business mix and Downtown occupancy.

The retail demand, or spending power of the trade area, is compared to the retail supply, or the retail sales of the area, in order to quantify potential unmet demand in Downtown Strafford. Retail categories with unmet demand are evaluated against the community survey results and economic and physical conditions of Downtown in order to develop a retail strategy.

<u>LIMITS OF STUDY</u>

The Retail Market Analysis is intended to provide a general forecast of the amount and types of retail development that could be supported in the trade area. The assumptions and projections used in the analysis are current and supported through the year 2016. Unforeseen 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 no longer applicable. The analysis is meant to provide general strategic direction for developing retail in Downtown Strafford. This study is not intended to be the sole basis for development decisions.

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TRADE AREA PROFILE

TRADE AREA DEFINITIONS

For the individual business location, a "trade area" refers to the geographic area from which a majority of its customers originate. For the Strafford Retail Market Analysis, the three trade areas used are established to create distinct geographic units for three areas of analysis:

- Comparison of demographic trends (e.g., population growth)
- Retail market conditions (e.g., existing retail)
- Identification of retail sectors likely to succeed in Downtown Strafford

The trade areas are discussed in further detail below. A map of each trade area is included in Appendix A.

- The Downtown Area (DTA), is Downtown Strafford as defined by the DREAM Study Area, covering 39 acres and consists of approximately 72 buildings on 10 city blocks. The DTA is analyzed for its current retail market conditions and demographic trends. This analysis is utilized in making retail development recommendations for Downtown Strafford.
- The Primary Trade Area (PTA) covers the geographic area within the boundary of the City of Strafford. The PTA is used to illustrate its demographic trends and retail market relationship with Downtown since a majority of consumers of Downtown retail typically come from within the City.
- The Secondary Trade Area (STA) covers the geographic area within a 25-minute drive time from Strafford. The STA has been modified in the Retail Market Analysis to exclude the following areas: Springfield immediately west of Strafford, north toward Fair Grove, and south toward Rogersville. These areas were excluded due to the comparatively stronger retail pull of the Springfield market. The STA is used in measuring the sectors of unmet retail demand that may be reasonably served by new retail in Downtown Strafford

TRADE AREA DEMOGRAPHIC SNAPSHOT

The analysis of demographic trends within the trade areas means little without comparison both to each other and to an established baseline. This comparison brings context to the demographic trends of each trade area. The baseline we use in this analysis is demographic data for the State of Missouri.

The following table highlights the 2010-2011 demographic data for all three trade areas and the State of Missouri. The data was obtained using the 2010 U.S. Decennial Census and a 2011 update from a third party supplier. The values in the demographic tables to follow should be read as estimates extrapolated from local census tracts and information supplied by the City of Strafford.

TABLE 1: 2010-2011 DEMOGRAPHIC SNAPSHOT

	Downtown Strafford	Primary Trade Area	Secondary Trade Area	State of Missouri
Population	47	2,358	23,754	5,988,927
Average Household Income	$52,088	$51,780	$49,256	$59,252
Housing Units	23	922	10,064	2,712,729
Owner Occupied	65%	62%	67%	60%
Renter Occupied	26%	32%	23%	27%
Vacant Units	9%	6%	9%	12%
Median Age	37.5	34.1	40.0	37.8
19 and Under	30%	31%	28%	27%
20-44	30%	33%	29%	32%
45 and Over	40%	35%	43%	41%

Noteworthy details from Table 1:

- The average household income in the STA is slightly lower than the DTA and PTA and $10,000 lower than the average for the State of Missouri. This may pose a challenge because consumers in this area may have slightly less disposable income.
- The STA has the highest proportion of owner-occupied housing units; seven points higher than the State of Missouri. This is a positive fundamental demographic for the retail market.
- The median age of the STA is the highest of all three trade areas and three years older than the median age for the State. This may have a slight impact on the kind of retail appropriate to serve these consumers.

MARKET PROFILE & DEMOGRAPHIC TRENDS

DOWNTOWN STRAFFORD (DTA)

Figure 1: DTA: Downtown Strafford

In 2010, 47 people lived Downtown in 21 occupied housing units for an average of 2.3 persons per occupied unit. The average household income was $52,088. The median age of Downtown residents was 37.5 with 30% of the population being age 19 or younger, 30% between 20 and 44 years of age, and 40% age 45 years or older.

Table 2, below, illustrates current and anticipated demographic trends for the DTA. The population in the DTA has dramatically decreased by 24% over the past decade. However, this number is expected to stabilize. The number of housing units decreased by 34% and is expected to continue to decrease albeit at a slower rate. The median age of the DTA has increased 7% and is expected to continue to increase in the next few years. This may indicate a challenge to retain younger residents. Average household income in the DTA has increased 19% and is expected to keep this pace in the near future.

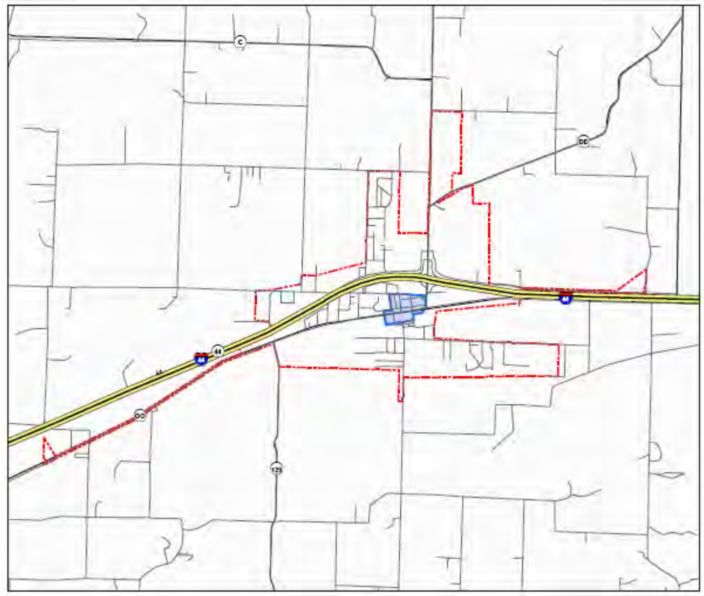
The fundamental demographics of population and number of housing units in the DTA have been trending in a negative direction. However, the DTA average household income is increasing which is a positive. Due to the DTA's small size, a prospective retailer will more likely consider the PTA's demographics which are covered in the following section.

TABLE 2: DOWNTOWN STRAFFORD

	2000	2010	2016	% Change '00-'10	% Change '10-'16
Population	62	47	49	-24.2%	4.3%
Average Household Income	$43,700	$52,088	$62,333	19.2%	19.7%
Housing Units	35	23	18	-34.3%	-20.6%
Owner Occupied	23	15	12	-34.8%	-20.9%
Renter Occupied	9	6	5	-33.3%	-20.0%
Vacant Units	2	2	2	0.0%	0.0%
Median Age	35.0	37.5	39.2	7.1%	4.5%
19 and Under	17	14	13	-17.6%	-7.1%
20-44	21	14	14	-33.1%	0.0%
45 and Over	25	19	20	-25.3%	5.3%

PRIMARY TRADE AREA (PTA)

Figure 2: PTA : City of Strafford



In 2010, 2,358 people lived in the PTA in 867 occupied housing units for an average of 2.7 persons per occupied unit. The average household income was $51,780. The median age was 34. About 32% of the population was 19 or younger; 33% of the population was between 20 and 44 years of age; and 35% of the population was 45 years of age or older.

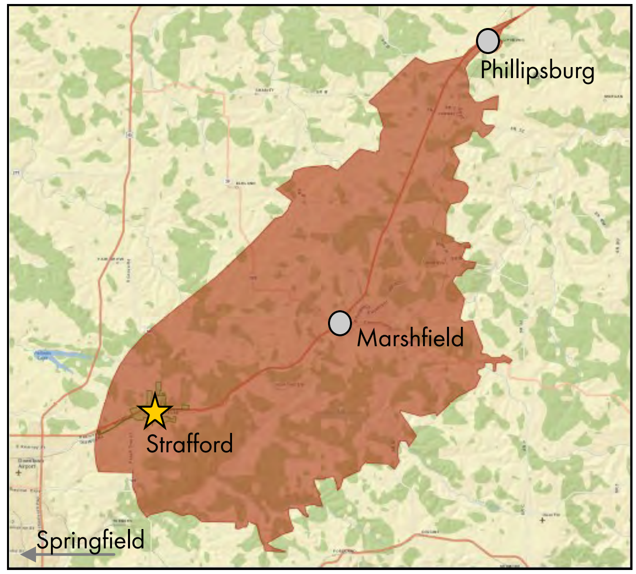
Table 3, below, illustrates current and anticipated demographic trends for the PTA. The population of the PTA has grown over the past decade by 27% but is anticipated to slow its growth rate down to 5%. Average household income has increased 32% in the past decade and is expected to continue to increase but at half the previous rate. Housing units have increased 28% and are expected to continue to increase at 16%. The median age of residents in the PTA has increased 6% and will continue to do so largely due to an anticipated loss of residents younger than 44 years old and a sharp increase in those 45 years and older. Compared to 2000, the number of residents aged 45 and older is expected to double from 567 to 1,027. Meanwhile, residents aged 20 to 44 will contract from 756 to 743. This may indicate that while Strafford is a bedroom community with increasing population and income, it is increasingly challenged by the loss of younger residents.

TABLE 3: PRIMARY TRADE AREA

	2000	2010	2016	% Change '00-'10	% Change '10-'16
Population	1,845	2,358	2,480	27.8%	5.2%
Average Household Income	$38,986	$51,780	$59,258	32.8%	14.4%
Housing Units	720	922	1,077	28.1%	16.8%
Owner Occupied	480	575	643	19.8%	11.9%
Renter Occupied	203	292	369	43.8%	26.3%
Vacant Units	37	55	71	48.6%	29.2%
Median Age	31.9	34.1	37.9	6.9%	11.1%
19 and Under	572	742	709	29.7%	-4.4%
20-44	756	786	743	4.0%	-5.5%
45 and Over	567	830	1,027	46.4%	23.7%

SECONDARY TRADE AREA

Figure 3: STA: Secondary Trade Area



Due to Strafford's proximity to Springfield with a stronger retail market, using a conventional 25-minute drive time to establish a trade area for Downtown Strafford is problematic. Therefore, this report considers a Secondary Trade Area with boundaries that encompass an area east of Springfield extending eastward along I-44 to include Strafford, Marshfield, and Phillipsburg to the northeast. This area is composed to identify retail sectors with unmet demand that Downtown Strafford may reasonably serve.

Since 2000, the population of the STA has experienced 14% growth in the last decade but is expected to slow its growth in the next few years to less than half that rate. The average household income has risen from $42,000 to $49,000 and is anticipated to grow to $56,000 in 2016. Total housing units have seen strong growth through 2010 and is expected to continue at a 10% growth rate. Owner-occupied housing units will increase by 8% in the next few years. The median age of residents in the STA has grown steadily with the largest surge seen among residents aged 45 and older. A growing population and growing average household income, albeit lower compared to Strafford and State average incomes, are two positive demographic trends in the STA. The growth rate of vacant housing units is a concern as it is anticipated to continue to outpace growth in both renter– and owner-occupied housing.

TABLE 4: SECONDARY TRADE AREA

	2000	2010	2016	% Change '00-'10	% Change '10-'16
Population	20,785	23,754	25,009	14.3%	5.3%
Average Household Income	$42,059	$49,256	$56,033	17.1%	13.8%
Housing Units	8,540	10,064	11,142	17.8%	10.7%
Owner Occupied	6,027	6,787	7,301	12.6%	7.6%
Renter Occupied	1,888	2,340	2,676	23.9%	14.4%
Vacant Units	632	937	1,208	48.3%	29.0%
Median Age	36.1	40.0	42.6	10.8%	6.5%
19 and Under	6,174	6,716	6,812	8.8%	1.4%
20-44	7,138	6,786	6,950	-4.9%	2.4%
45 and Over	7,474	10,252	11,246	37.2%	9.7%

STATE OF MISSOURI

Table 5, below, illustrates demographic trends for the State of Missouri. As of 2010, nearly six million people lived in the State of Missouri in 2.3 million occupied housing units. The average household income was $59,252. The median age was 38. About 27% of the population was age 19 or younger; 32% was between the ages of 20 and 44; and 41% was age 45 years or more.

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 illustrate the rates of change of demographic information for the trade areas and the State of Missouri. Over the past ten years, the DTA lost population while the PTA and STA gained residents. The PTA and STA populations grew at a much higher rate than the State. Average household income in the PTA saw the highest growth. The median ages in the DTA, PTA, and STA have grown older at a higher rate than the State. Together, all three trade areas show anticipated growth rates in population and average household income that are better than the State. This marks a relatively stable retail market. The slightly higher aging of residents in the trade areas compared to the State is not a negative trend but may influence the kind of retail appropriate to serve this market.

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
DTA	-24.2%	4.3%	19.2%	19.7%	+2.5	+1.7
PTA	27.8%	5.2%	32.8%	14.4%	+2.2	+3.8
STA	14.3%	5.3%	17.1%	13.8%	+3.9	+2.6
State	7.0%	2.8%	18.6%	12.1%	+1.7	+0.6

Table 7 details the changes in age groups in each trade area. The DTA showed a loss across all age groups but especially amongst those in their earliest working years, ages 20 to 44. This movement of residents out of the DTA is anticipated to lessen and stabilize in the coming years. The PTA and STA had their largest gains in the 45 and older age group and will continue to see growth amongst these residents at a much higher rate than the State. This may indicate that consumers in their peak working years as well as retirees are finding Strafford and the area immediately east of Springfield an attractive place to live. This demographic trend is worth considering when forming retail development recommendations for Downtown Strafford.

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
DTA	-17.6%	-7.1%	-33.1%	0.0%	-25.3%	5.3%
PTA	29.7%	-4.4%	4.0%	-5.5%	46.4%	23.7%
STA	8.8%	-7.1%	-4.9%	2.4%	37.2%	9.7%
State	0.5%	0.0%	-2.9%	0.8%	22.2%	6.3%

Table 8 depicts growth trends in housing units by tenure in each trade area. Together, housing units in the PTA and STA are growing at twice the rate of the State. Housing units in the DTA have fallen by 34% and are expected to decrease by 20% in the near future. The STA is anticipated to grow its number of owner-occupied housing units by 7%. The PTA expects renter-occupied housing units to increase by 26%. The high anticipated growth rate of owner-occupied housing units in both the PTA and STA, compared to the State, are a positive trend for the retail market in and around Strafford. A more in-depth analysis of the housing market in the DTA follows in the next section.

TABLE 8: DEMOGRAPHIC HOUSING UNITS COMPARISON

	Housing Units Change		Owner Occupied Change		Renter Occupied Change	
	00-'10	10-'16	00-'10	10-'16	00-'10	10-'16
DTA	-34.3%	-20.6%	-34.8%	-20.9%	-33.3%	-20.0%
PTA	28.1%	10.7%	19.8%	11.9%	43.8%	26.3%
STA	17.8%	10.7%	12.6%	7.6%	23.9%	14.4%
State	11.1%	6.7%	5.9%	3.6%	13.7%	8.2%

HOUSING MARKET ANALYSIS SUMMARY

The Missouri Housing Development Commission (MHDC) conducted a Residential Demand Analysis in July 2010 that projected residential demand for Strafford, with a focus on Downtown. The Residential Demand Analysis concluded the market could absorb 33 additional market-rate rental units and 16 affordable senior housing units for a total of 49 rental units. The report also noted that there could be some future household demand for homes in the $100-$200,000 range and affordable family rental units. Projected demand for all housing options for Downtown Strafford totaled 81 households.

The benefits of increasing residential units in Downtown Strafford include:

- Utilizing vacant or underutilized land and buildings
- Increasing consumer traffic and density
- Increasing the local tax base, and
- Creating ideal conditions for extended business hours and additional businesses.

Although the preceding demographic trends indicate a continuing contraction in the number of housing units in Downtown Strafford, this does not mean that the City should not encourage residential uses. The City should pursue a policy of encouraging mixed-use buildings that would allow not only residential growth, but commercial and retail growth as well. These two land uses create a synergistic effect resulting in a more vibrant living space and active shopping experience. The preceding demographic trends show there may be a growing demand for senior affordable housing units. As the housing market moves toward recovery, the City should promote the conversion of upper floors of existing commercial buildings to residential uses to serve this growing demand.

CONSUMER SEGMENTS

Consumers do not have uniform needs and desires when it comes to their retail purchases. To form more effective retail development strategies tailored to their primary consumers, a city should consider its consumers according to their unique circumstances. Once these segments are identified, the City can work toward a plan that increases Downtown's ability to provide services to these major consumer segments. According to the research conducted for this report, there are four broad categories of consumers Downtown Strafford serves:

Downtown Employees

- Downtown is home to 208 employees at 23 businesses.
- This segment has a demand for restaurants at lunch and early evenings.
- Additional demand for convenience items and shopping after work hours.
- Frequent customer reward programs and repeat business marketing efforts can be effective when targeting this segment.

Strafford Residents

- There are 2,358 residents citywide (PTA) according to the 2010 Census.
- They visit Downtown for shopping or business.
- Their presence increases foot traffic and creates a more active environment.
- Effective strategies for this segment are to inspire brand loyalty through targeted marketing efforts tied with events in the community calendar such as 'back-to-school' and customer incentives
- Retirees, both in and around Strafford, are a growing segment with specific consumer needs around health, medical devices, leisure and entertainment, and seek value when making purchases given fixed household incomes

Travelers

- Over 35,740 travelers drive through Strafford on I-44 every day according to Missouri Department of Transportation
- Beyond refueling, travelers have a demand for dining and convenience items
- Traveling families also welcome visitor destinations for rest, entertainment, and are attracted to novelty items

FOCUS GROUP SURVEY

To gather community perceptions and desires for Downtown Strafford, the DREAM Initiative conducted a focus group survey in the community. Survey respondents shared what they liked or did not like about Downtown Strafford and whether the area was headed in the right or wrong direction. They also suggested what should be prioritized to improve Downtown and make it more attractive.

Focus group surveys included the following types of respondents: school board and administrators, elected officials, business owners, City staff, City residents, and high school students. Survey findings are summarized below:

- Strafford is a "bedroom community" to Springfield, Missouri, which makes it a great place to raise a family because the community itself is so small, but the residents have such easy access to the diverse shopping and entertainment options in Springfield.
- Residents shop at the grocery store and gas stations in Strafford, but for everything else, they go to Springfield, for Wal-Mart, the mall, and a variety of shopping options.
- Restaurants in Strafford include mostly fast food and a few independently-owned options: Taco Bell, Subway, McDonald's, a truck stop, pizza places, and Joe's Diner.
- Residents regularly travel to Springfield, to dine with their families and friends because Strafford simply does not have enough dining options and because Strafford's restaurants are unable to get by-the-glass liquor licenses.
- The community would welcome a wider variety of restaurants including a Chinese restaurant, a Mexican restaurant, a higher-end bar, a coffee shop, any restaurant with outdoor seating, and restaurants with a by-the-glass liquor license.
- For recreation and entertainment,...most people travel to Springfield, for movie theaters, shopping, restaurants, bowling alleys, and other entertainment options there.
- The participants had some major concerns about user-friendliness, including parking, lighting, signage, sidewalks, pedestrian safety, and Downtown Strafford's reputation as a "speed trap."
- For retail, they suggested clothing, Route 66 souvenir shops, antique stores, and any other independent shop that a business owner might be interested in opening.
- For entertainment, the focus groups suggested live music, a bowling alley, a small movie theater, a live theater, a farmer's market, and any option for teenagers.
- Downtown's purpose should be to offer a unique experience to customers, particularly visitors within commuting range and visitors tracing Route 66.

Implications of the preceding survey data include:

- *Focus on Small Business.* Some of the chain or big-box retail and restaurant business desired by the focus groups may not be an ideal fit for Downtown Strafford due to physical constraints such as smaller parcel size or reduced sight lines to the I-44. The focus should be kept on attracting independent retailers and operations within Downtown Strafford. Efforts aimed at larger retail should be focused on areas in Strafford with larger assemblages of land and closer proximity or line of sight to the highway.
- *Regional Appeal.* Boutique retail, locally owned restaurants, and independent entertainment venues that decide to operate in Downtown Strafford should endeavor to appeal to a customer base beyond the City's limits to include visitors from within the STA. These businesses may not be sustained only by the residents within the PTA. They will have to fill voids in and compete with the stronger Springfield market.
- *Sell An Experience.* A unique experience should be a prominent feature of new retail in Downtown Strafford that hopes to draw customers from outside the City and keep them coming back. Whether it be excellent and knowledgeable customer service, appealing store environment, or themed retail such as one inspired by the history of Route 66, all are possible planks that individually or in tandem will differentiate local retail from the many store options in the much larger market of nearby Springfield.

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MARKET RESEARCH FINDINGS

LAND USE MIX & VACANCY

The following is a discussion of the land use mix and level of vacancy of first-floor space in Downtown Strafford. Table 9 assembles information from the DREAM Land Use, Building & Infrastructure Survey; conducted in 2009 and subsequently updated with assistance from City staff. Downtown Strafford has 71 parcels on which 63 primary buildings are located with 127,000 square feet of first-floor space. Eight of these buildings are identified as retail or restaurant and represent 14,654 square feet of first-floor space, of which, 4,000 square feet is vacant. The average vacancy rate for retail and restaurant space is 27%. This is quite high and presents an immediate challenge to the perception of Downtown Strafford as a destination and its revitalization.

Retail and restaurant uses are critical in creating a vibrant Downtown atmosphere. In Downtown Strafford, the first-floor use is composed of 39% office and service, 24% residential, 23% public and institutional, 12% retail and restaurant, 5% mixed-use, and 3% industrial. Non-retail uses account for 94% of first-floor space. This imbalance may require the City of Strafford to take aggressive measures such as adjusting zoning codes to preserve prime, first-floor spaces for retail and restaurants as demand for these uses is being built.

TABLE 9: LAND USE TOTALS & SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Residential					
Single-Family	19	23	26,273	700	2.7%
Multi-Family	2	2	3,914	0	0.0%
Sub-Total	**21**	**25**	**30,187**	**700**	**2.3%**
Commercial					
Office / Service	18	23	49,687	3,650	7.3%
Retail	6	6	12,244	3,000	24.5%
Restaurant	2	2	2,410	1,000	41.5%
Sub-Total	**26**	**31**	**64,341**	**7,650**	**11.9%**
Industrial	3	3	3,557	0	0.0%
Mixed-Use	1	0	0	0	
Public / Institutional	10	7	28,507	0	0.0%
Parking Lot	1	NA	NA	NA	NA
Vacant Lot	9	NA	NA	NA	NA
TOTAL	**71**	**63**	**126,592**	**8,350**	**6.6%**

* Building Square Footage assumes that 80% of the building footprint is usable.
* Building Square Footage is for 1st Floor.

RETAIL ANALYSIS

This section will briefly review the current retail sectors present in each trade area, select Downtown retail establishments, and the average annual household consumer expenditure by category in each trade area. First, will be an estimate of projected sales for the existing 4,000 square feet of vacant retail and restaurant space in Downtown Strafford.

Current sales per square foot of occupied retail and restaurant space can be used to help estimate potential sales performance of vacant first-floor space when it becomes occupied. The retail and restaurant space is generating $1.5 million in annual sales (sales do not include auto dealers, gasoline stations or non-store retailers). The retail component of this space is generating $150 per square foot and the restaurant portion $350 per square foot. However, this number is quite high so in the report we use a rate of $250 per square foot for restaurant space. Using these averages, the 4,000 square feet of retail/restaurant vacancy represents an additional $600,000 to $1 million in potential annual sales.

Table 10, below, lists existing retail sectors within the three trade areas. They are ordered by decreasing number of establishments. For example, food services and drinking places top the list with 38 businesses employing 520 people across all three trade areas. In contrast, furniture/home furnishings are the least represented. This sector has 7 businesses employing 16 people across all three trade areas.

TABLE 10: RETAIL ESTABLISHMENTS

Retail (Pedestrian-Generating Businesses) Trade Summary	Downtown Strafford		Primary Trade Area		Secondary Trade Area	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
Food Services & Drinking Places	1	6	6	67	31	447
Food & Beverage Stores	0	3	5	34	23	263
Miscellaneous Store Retailers	0	0	1	1	16	30
Arts, Entertainment & Recreation	0	2	0	0	16	134
Sporting Good, Hobby, Book & Music Stores	1	0	1	0	14	26
Accommodation	0	0	2	4	13	60
Bldg. Materials & Garden Equipment & Supplies	0	3	1	14	13	90
Health & Personal Care Stores	1	2	1	8	11	55
Clothing & Clothing Accessories Stores	0	0	1	1	8	18
General Merchandise Stores	0	0	1	0	8	155
Electronics & Appliance Stores	0	0	1	0	7	8
Furniture & Home Furnishings Stores	0	0	1	3	6	13
TOTALS:	*3*	*16*	*21*	*132*	*166*	*1,299*
Total Businesses (including non-retail)	23		124		941	
Total Employees (including non-retail)	208		1,056		6,249	
Total Residential Population	47		2,358		23,754	
Employee/Population	4.43		0.45		0.26	

Table 11, below, lists some major Downtown retail businesses. The retail services listed in Tables 12 and 13 are organized according to NAICS code to allow comparison of retail activity by sectors. Recommendations can then be made for retail sectors to address any gaps in retail service. The tables indicate Downtown Strafford has very few retail businesses. This supports the high 27% vacancy rate in retail/restaurant space and the 94% non-retail use mix discussed previously.

TABLE 11: EXISTING RETAIL

NAICS Industry Group	Store Name
Health & Personal Care Stores	Family Pharmacy
Sporting Goods & Hobby Stores	Route 66 Sports
Food Services & Drinking Places	Joe's Diner

Estimating average household spending per retail sector provides insight into the demand for particular retail services within a given trade area. Table 12, below, lists annual household consumer expenditures for seven main categories and several sub-categories of retail expenditures.
The largest portion of expenditures are spent on food (groceries and restaurants), transportation, and entertainment and recreation. Residents in the trade areas spend approximately 40% of food expenditures at restaurants. This, in conjunction with the desire for more dining establishments expressed in the focus groups surveys, is worth considering in prioritizing future businesses in Downtown Strafford.

TABLE 12: CONSUMER EXPENDITURES

	Downtown Strafford	Primary Trade Area	Secondary Trade Area
Average Household Income	$52,088	$51,780	$49,256
Average Annual Household Expenditures for Selected Retail Sectors			
Food	**$6,207**	**$6,307**	**$5,849**
Food at Home	$3,584	$3,642	$3,443
Food Away from Home	$2,623	$2,665	$2,406
Apparel and Services	**$1,320**	**$1,341**	**$1,208**
Household Merchandise	**$1,341**	**$1,363**	**$1,230**
Electronics	$326	$331	$292
Household Goods	$1,015	$1,032	$938
Household Care	**$322**	**$328**	**$314**
Transportation	**$3,300**	**$3,354**	**$3,154**
Health & Personal Care	**$921**	**$936**	**$905**
Health Care	$589	$599	$602
Personal Care Products	$332	$337	$304
Entertainment & Recreation	**$3,281**	**$3,334**	**$3,110**
Total for selected sectors	**$16,693**	**$16,963**	**$15,771**

Table 13 measures the number of households at regular income thresholds within each trade area. This can provide insight into the kind of retail to offer and where to focus marketing efforts. The STA has over 3,000 households with income over $50,000. Determining the retail sectors that have unmet demand in the STA will help Downtown focus on serving those voids with new businesses. Targeting the residents of these households with marketing efforts will be an important component in expanding the Downtown retail base.

TABLE 13: HOUSEHOLD INCOME

Income Level	Downtown Strafford	Primary Trade Area	Secondary Trade Area
Less than $ 15,000	2	90	1,521
$ 15,000 - $24,999	3	108	1,188
$ 25,000 - $34,999	3	137	1,486
$ 35,000 - $49,999	5	202	1,609
$ 50,000 - $74,999	5	192	1,761
$ 75,000 - $99,999	2	71	828
$ 100,000 - $149,999	1	55	559
$ 150,000 - $199,999	0	9	125
$ 200,000 +	0	11	110
Total	21	875	9,187

POTENTIAL STORE SPACE SUPPORTED

This section analyzes the retail sectors with unmet demand (the difference between retail demand and actual sales) in the STA. This demand and lack of local supply is prompting shoppers to leave the STA and pass through the Strafford area for Springfield, Missouri. This presents an opportunity for Downtown Strafford to capture more retail dollars.

Table 14, on the following page, lists retail categories in order of greatest opportunity by dollar amount. Each sector's opportunity amount is divided by the average retail sales per square foot ($150) and the average restaurant sales per square foot ($250). This indicates Downtown Strafford could support 132,000 square feet of retail/restaurant space. Existing retailers could capture this unmet demand by expanding floor area and adding new products or new retailers could enter the marketplace.

Meeting all of the retail demand could generate over $20 million dollars in additional sales for Strafford. However, it is unlikely that 132,000 square feet of retail space can be readily developed and that the full $20 million demand will be captured. The information in the table does provide a list of retail sectors from which Strafford may prioritize its Downtown business expansion and attraction effort.

TABLE 14: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.) Supported[2]
Limited-Service Eating Places (NAICS 7222)	$6,098,081	24,392
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$3,308,046	28,135
Full-Service Restaurants (NAICS 7221)	$3,001,254	12,005
Clothing Stores (NAICS 4481)	$2,376,979	20,217
Furniture & Home Furnishings Stores (NAICS 442)	$2,243,886	19,085
Other Miscellaneous Store Retailers (NAICS 4539)	$743,131	6,320
Special Food Services (NAICS 7223)	$739,559	2,958
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$736,897	6,267
Drinking Places - Alcoholic Beverages (NAICS 7224)	$444,005	1,776
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$391,430	3,329
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$285,264	2,426
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$280,929	2,389
Shoe Stores (NAICS 4482)	$182,087	1,549
Florists (NAICS 4531)	$88,748	755
TOTAL	**$ 20,920,296**	**131,604**

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

[2] Based on $150 in retail sales per square foot, $250 in restaurant sales per square foot, and existing retail building inventory and activity in Downtown Strafford.

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

- Limited-service eating places like fast casual concepts such as Panera, full-service restaurants with table service, and special food services such as catering for special events.
- Clothing stores and other miscellaneous store retailers, such as specialty swimming pool supply, pet care items, or art supplies.
- Furniture and Home Furnishings.

The high placement of these sectors corresponds to the focus groups' desire for eating establishments and independent, specialty stores. New businesses may consider the growing market of retirees when merchandising retail locations. Stores in the Health and Personal Care sector may be particularly impacted by this demographic trend. Other retailers stand to increase their competitive advantage by focusing on the specific products and service needs of senior households.

Although they are not listed in Table 14, automotive parts and accessories stores (NAICS 441310) can be included in the retail development of Downtown Strafford. This is consistent with the celebration of Route 66 and Strafford's place in American automotive transportation history. Preference may be given to operators in the niche market of supplying parts and accessories to classic car enthusiasts. New businesses primarily involved in automobile maintenance and repair may not be appropriate for Downtown particularly if the garage and repair work is visible from the street.

AVAILABLE RETAIL SPACE INVENTORY

With the review of opportunity retail sectors in the previous section, the following makes recommendations on what potential retail may be appropriate for the available retail space inventory. The vacant properties identified in Downtown Strafford are shown on Table 15 below and on the First Floor Vacancy Map in Appendix D. The table also lists the retail suggestions for each vacant space that might work for Downtown Strafford. This proposed mix of business represents just one conceptual way that existing space in Downtown Strafford may be occupied. This space does not account for the possible retail area supported that would be absorbed by the expansion of existing retailers in Downtown.

TABLE 15: 1ST FLOOR VACANCY

Address	Available Sq.Ft.	Potential Retail
201 W. Old Route 66	1,450	Clothing Store
100 E. Pine Street	3,000	Specialty Store
201 E. Old Route 66	1,300	Full-Service Restaurant
101 E. Pine Street	1,000	Electronics & Appliance Store
214 E. Chestnut	600	Specialty Store
118 E. Pine Street	300	Specialty Store
Total	7,650	

Vacant lots in Downtown Strafford should be considered along with first-floor vacant space when planning retail development opportunities. The map below shows vacant lots and one parking lot that present infill development opportunities within Downtown Strafford.

Figure 4: Vacant and Parking Lots

DOWNTOWN STRAFFORD RETAIL GOALS

The primary opportunities for retail development in Downtown Strafford are to capitalize on both the traffic en route to nearby Springfield and the City's location on historic Route 66. Ongoing strategy should focus on capturing retail sectors with unmet demand within the STA, as described previously in the report.

- ENCOURAGE FORMATION OF ROUTE 66 EXPERIENCE

  More than 44,000 vehicles travel through Strafford on I-44 every day according to a third-party data supplier. Establishing a visitor destination to celebrate the 'Mother Road' of the United States could draw travelers into Downtown Strafford. Good traffic volume into a city is a requirement for retailers and the creation of a Route 66 experience in Strafford is one concept to help drive this traffic.

- ENCOURAGE RETAIL USES THAT CAPTURE UNMET RETAIL DEMAND EAST OF SPRINGFIELD

  Downtown Strafford is challenged by its close proximity to a strong retail market in Springfield. Residents from Strafford and surrounding communities are all drawn to Springfield for almost all of their shopping and dining needs. Despite its retail power, the Springfield market has voids in its ability to meet demand in several retail sectors. The Action DREAM Committee can use this information to focus its business expansion and attraction efforts within these sectors.

- ESTABLISH AN IMPROVED AESTHETIC FOR DOWNTOWN

  Throughout the public outreach component for the DREAM Initiative, the community 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. Examples include improved building façades, parking standards, and an overall parking plan. These are first steps toward creating a more attractive Downtown shopping destination.

- NEW DEVELOPMENT
  As retail market demand is built up, the Action DREAM Committee, in cooperation with the City, should incorporate vacant lots with first-floor vacant space into their marketing of development opportunities in Downtown Strafford.

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DOWNTOWN STRAFFORD STRATEGIES

Downtown's retail goals can be achieved by implementing several key strategies. These strategies must be realistic and based on an understanding of Downtown Strafford'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 Strafford.

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 Strafford 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;

- 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.

Downtown Environment & Appearance

Downtown Strafford'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 Strafford. 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 Strafford'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. Further, 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 Strafford. 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 28.

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 Strafford. 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 of this type should be about 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:

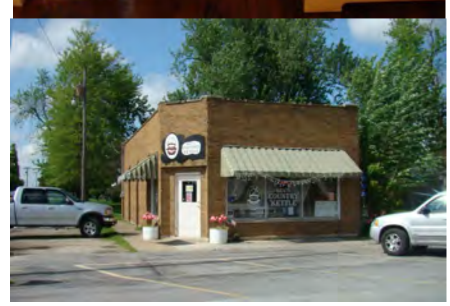
- Movie Theatres
- Farmer's Markets
- Grocery Stores
- Furniture Stores

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 Strafford 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. 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 Strafford 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, and special orders.
- 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.

ATTRACTING CUSTOMERS

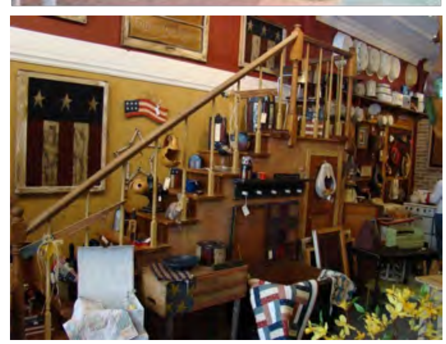
Attracting customers is an integral component of retail success. Downtown has established a pool of existing customers and needs to continue to reach-out to new customers. Businesses should use existing customers as a source of referrals, creating a base of repeat customers. To maintain customers and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

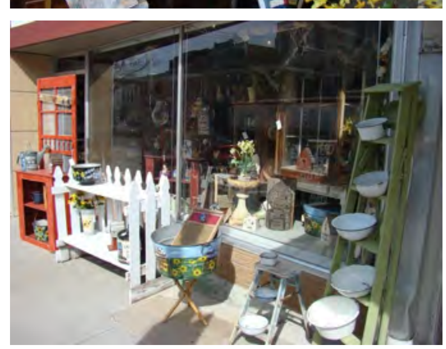
- Expert friendly customer assistance
- Unique merchandise
- Interesting environment not found elsewhere

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 Strafford, 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 on-line, 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. 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 attractions, businesses, and events is a major dimension of downtown 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 Strafford. 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 about Downtown's business establishments should be distributed to residents and visitors, and placed in existing retail establishments and new stores. 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 Strafford, especially those businesses that might draw customers or visitors from a wider geographic area.

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, they help keep pedestrians moving and their appearance encourages pedestrians to cross the street. 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.

Please refer to the Existring Store Checklist in Appendix F for a useful worksheet to examine and improve retail store presentation and operations.

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 have been created they should be lighted. When lighted they add life to the evening streetscape and act as a 24 hour billboard. People leaving nearby businesses with later uses, 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.

Signage and Branding

When establishing business goals, owners must decide on their brand or define the store and how they hope to be perceived by customers. These decisions will determine the store logos, signage, and interior design. Colors and font type used 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.

- 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 has identified a wide range of goals and strategies, based upon an analysis of the demographic and economic trends driving Strafford's retail market. The implementation of these goals and strategies will be included in the DREAM Downtown Strategic Plan.

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

- **Implement other Key DREAM Recommendations**
  - such as those found in the Organizational Structure Review, CID Marketing Plan, Building and Streetscape Design Guidelines, and Financial Assistance Review. The recommendations found in these reports are critical for Downtown Strafford to fully capitalize on the surrounding retail market.
- **Encourage Formation of Route 66 Experience**
  1. Action DREAM Committee initiates the recommendations found in the CID Marketing Plan to establish the Downtown Strafford Community Improvement District (DSCID)
  2. Action DREAM Committee, DSCID, and the City initiate the Strafford Station Signature Project in the Building and Streetscape Design Guidelines
  3. Action DREAM Committee and DSCID, in cooperation with the Strafford Area Chamber of Commerce, integrate Route 66 Days annual event into programming and marketing of Strafford Station
  4. Action DREAM Committee, DSCID, Strafford Area Chamber of Commerce, and City implement targeted marketing campaign in the Missouri communities of Springfield, Joplin, Lebanon, Rolla celebrating Route 66, Route 66 Days, and Strafford Station.
  5. Regularly measure visitor traffic through Strafford Station, Downtown Strafford, and during the Route 66 Days festival event.
     - Include visitor traffic numbers in business attraction content for Downtown Strafford
- **Encourage Retail Uses That Capture Unmet Retail Demand East of Springfield**

  The Action DREAM Committee, DSCID, and Strafford Area Chamber of Commerce are responsible for cooperating on the following tasks:

  1. Refer to the retail sectors with unmet retail demand in Table 14 on page 20
  2. Identify existing businesses currently operating within any of the retail sectors above
  3. If the business shows demonstrated growth, consider approaching business

owner regarding expansion or relocation to larger space in Downtown Strafford.

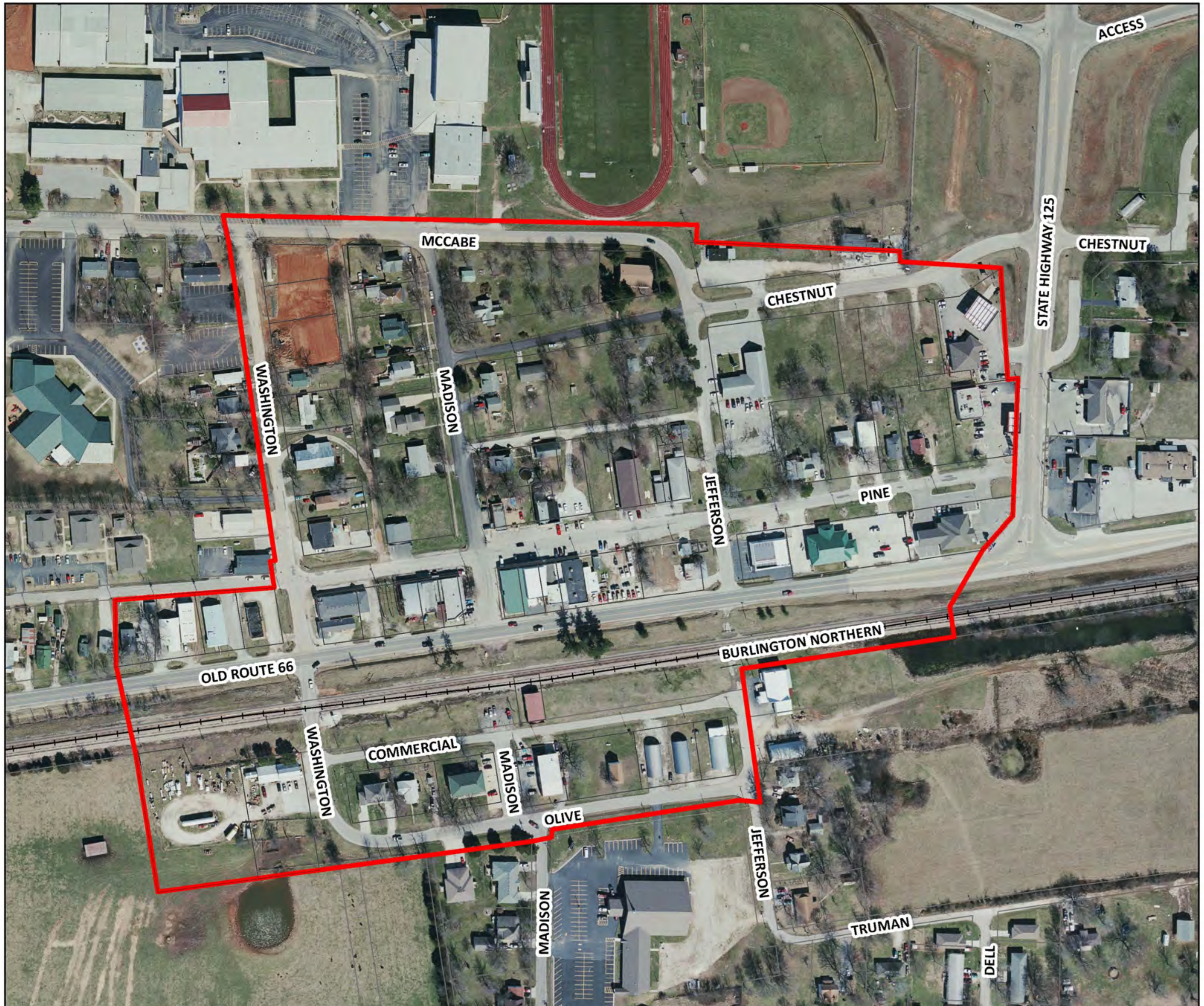
3. Establish relationships with local industry associations that represent each of the above sectors to network more effectively.
    - E.g., the Springfield/Branson Chapter of the Missouri Restaurant Association to network with dining establishments
4. Identify and recruit entrepreneurs operating within targeted retail sectors. Consider mining local school and college alumni or the Missouri State University Small Business Technology Development Center in Springfield to make contact with entrepreneurs.
5. Establish relationships with retail businesses in nearby communities to identify new location opportunities early.
6. Measure new business openings, available properties, infill development properties and readjust business expansion and attraction efforts as necessary.

- **Establish An Improved Aesthetic for Downtown**

The Action DREAM Committee, DSCID, and City are responsible for the following task:

1. Implement wayfinding principles in new signage directing traffic from highway 125 and Old Route 66 into Downtown Strafford
2. Implement rehabilitation, new construction, and streetscape guidelines in the Building and Streetscape Design Guidelines

APPENDIX



Appendix A-1
Downtown Strafford

Retail Market Analysis
City of Strafford, Missouri

Legend

DREAM Boundary

0 100 200 400
Feet

N

March 2012

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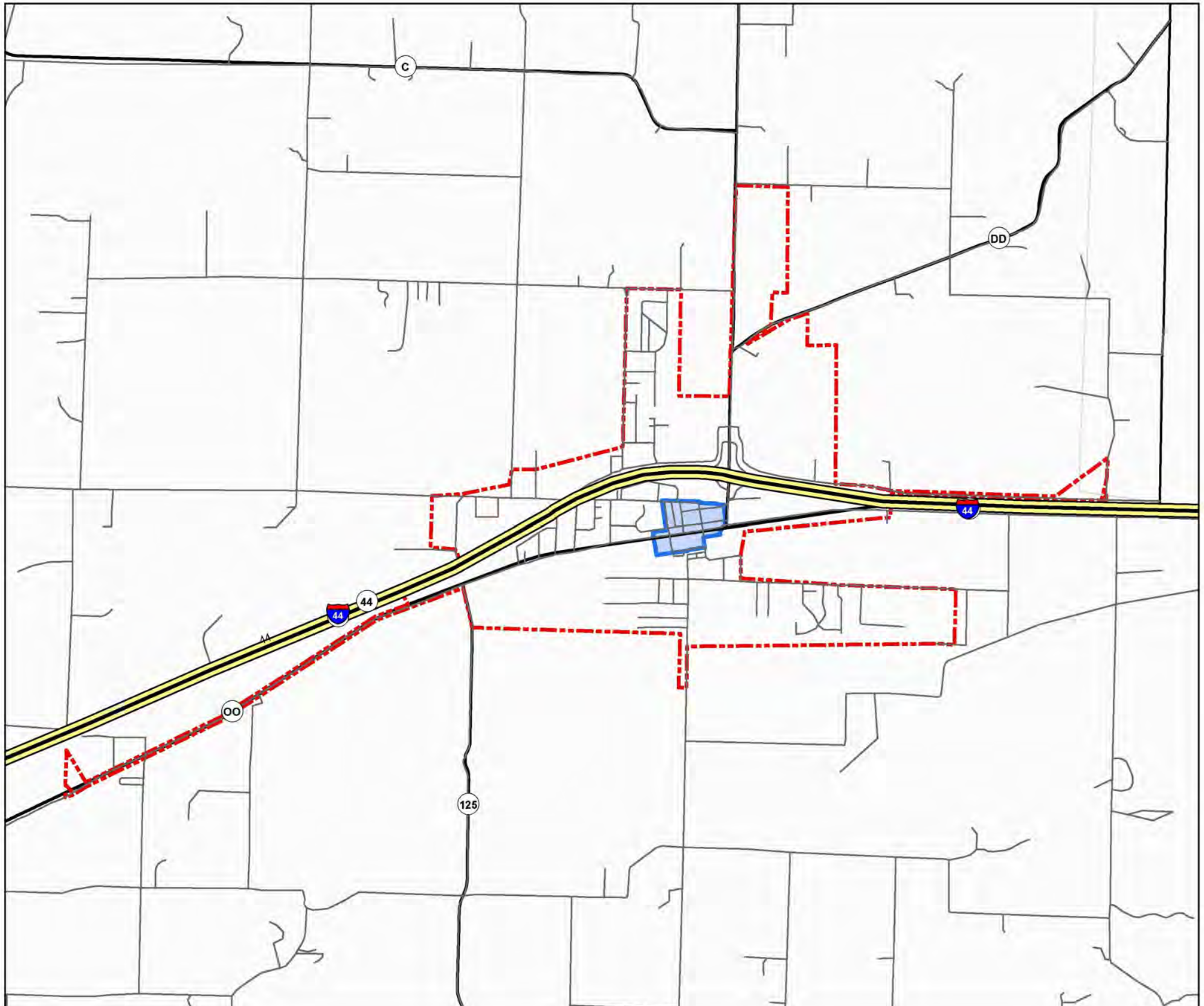
Appendix A-2
Primary Trade Area

Retail Market Analysis
City of Strafford, Missouri



Legend

DREAM Boundary
Primary Trade Area

0 1,200 2,400 4,800
Feet

N

March 2012

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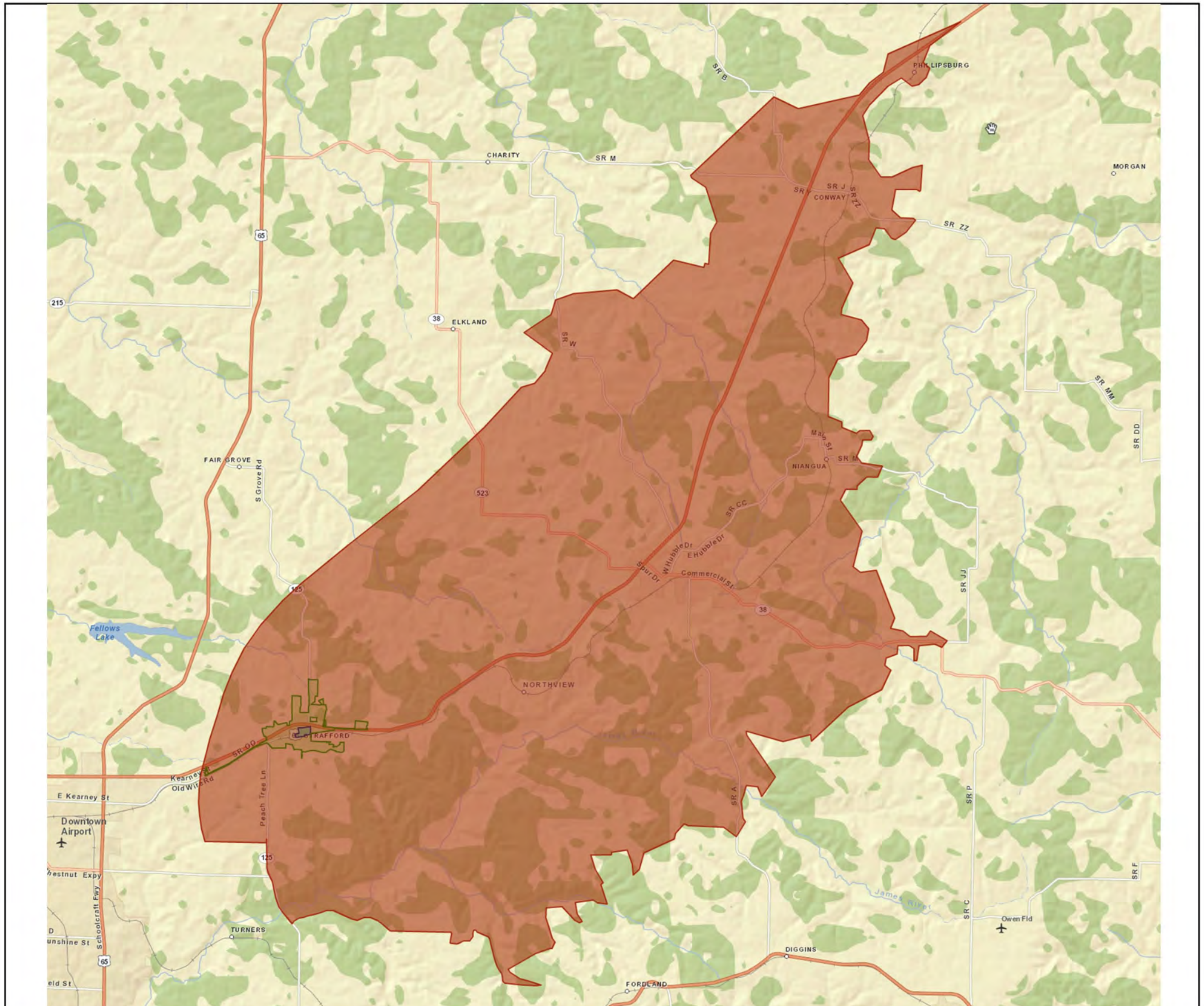

Appendix A-3
Secondary Trade Area

Retail Market Analysis
City of Strafford, Missouri

Legend

Secondary Trade Area

March 2012

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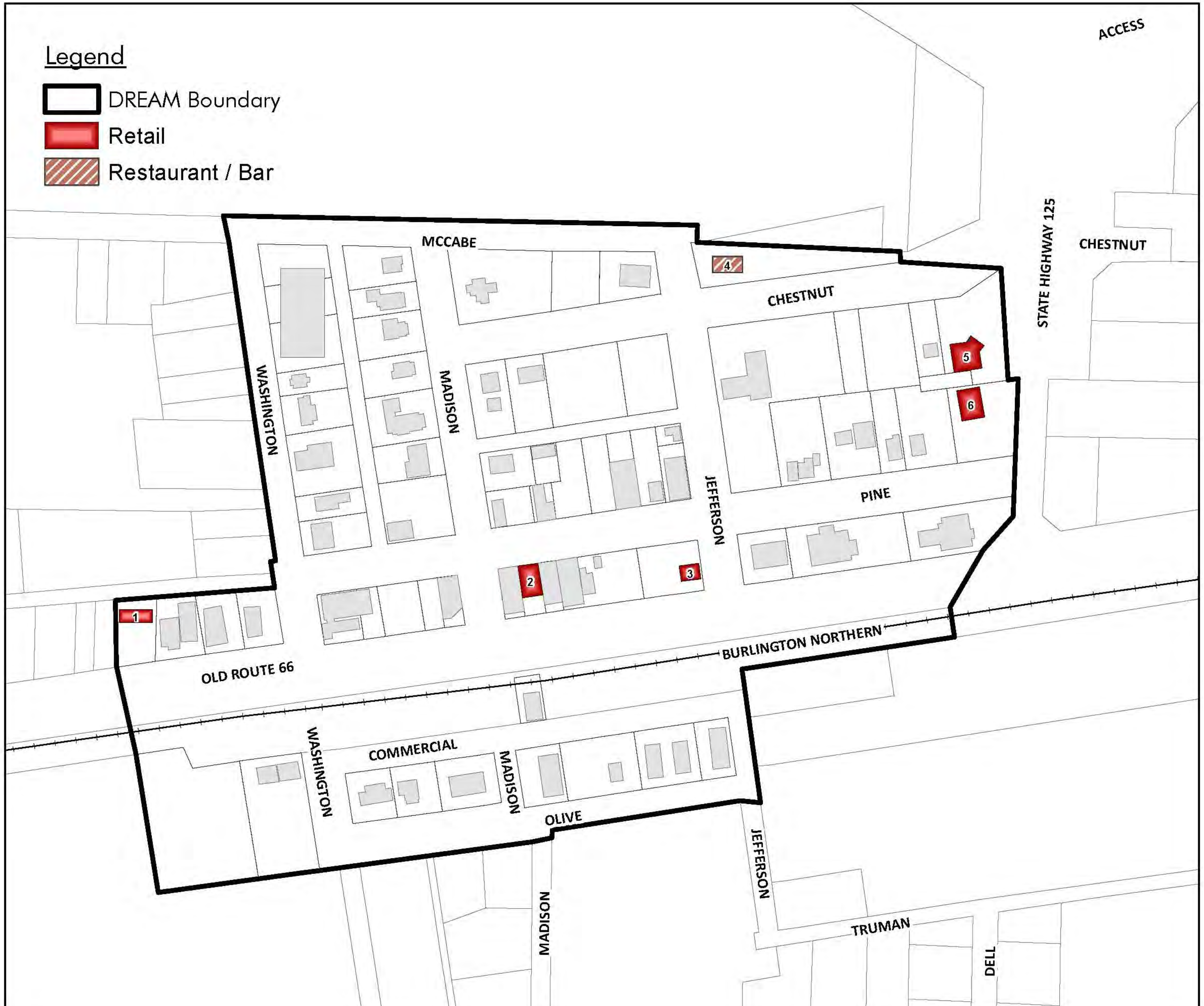
Appendix B

Downtown Strafford 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]	**$116,940,533**	**136**	**$105,330,267**	**$ 11,610,266**	**52,421**	**4,923**	**$11,816,617**	**19**	**$13,417,004**	**$1,584,054**	**4**	**322**	**6.85**
Total Retail Trade (NAICS 44-45)	**$90,614,456**	**104**	**$89,287,089**	**$ 1,327,367**	**11,289**	**3,815**	**$9,004,099**	**12**	**$9,781,619**	**$1,086,873**	**2**	**285**	**6.06**
Total Food & Drink (NAICS 722)	**$26,326,077**	**32**	**$16,043,178**	**$ 10,282,899**	**41,132**	**1,108**	**$2,812,518**	**7**	**$3,635,385**	**$497,181**	**1**	**449**	**9.54**
Furniture & Home Furnishings Stores (NAICS 442)	$3,279,928	5	$1,036,042	$ 2,243,886	19,085	138	$420,022	1	$233,105	$21,000	0	152	3.24
Furniture Stores (NAICS 4421)	$2,098,727	2	$358,856	$ 1,739,871	14,798	88	$273,903	0	$0	$0	0	0	0.00
Home Furnishings Stores (NAICS 4422)	$1,181,201	3	$677,186	$ 504,015	4,287	50	$146,119	1	$233,105	$21,000	0	422	8.99
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$4,372,244	7	$1,064,198	$ 3,308,046	28,135	184	$499,197	1	$225,916	$47,601	0	259	5.50
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$6,018,066	14	$3,496,246	$ 2,521,820	21,448	253	$626,955	1	$480,293	$101,199	0	399	8.50
Building Material and Supplies Dealers (NAICS 4441)	$5,394,052	10	$2,769,756	$ 2,624,296	22,320	227	$555,493	1	$480,293	$101,199	0	446	9.48
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$624,014	4	$726,490	$ (102,476)	(872)	26	$71,462	0	$0	$0	0	0	0.00
Food & Beverage Stores (NAICS 445)	$19,547,880	20	$27,587,634	$ (8,039,754)	(68,379)	823	$1,861,777	5	$5,039,440	$454,003	0	552	11.74
Grocery Stores (NAICS 4451)	$19,022,008	15	$27,144,979	$ (8,122,971)	(69,087)	801	$1,759,441	4	$4,868,594	$438,612	0	548	11.65
Specialty Food Stores (NAICS 4452)	$127,404	4	$233,189	$ (105,785)	(900)	5	$13,730	0	$0	$0	0	0	0.00
Beer, Wine, and Liquor Stores (NAICS 4453)	$398,468	1	$209,466	$ 189,002	1,607	17	$88,606	1	$170,846	$15,392	0	918	19.52
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$5,411,516	11	$4,674,619	$ 736,897	6,267	228	$742,294	1	$743,427	$156,642	0	688	14.63
Clothing and Clothing Accessories Stores (NAICS 448)	$3,784,746	8	$944,751	$ 2,839,995	24,155	159	$609,000	1	$59,579	$12,553	0	79	1.68
Clothing Stores (NAICS 4481)	$3,263,790	7	$886,811	$ 2,376,979	20,217	137	$485,612	1	$59,579	$12,553	0	91	1.94
Shoe Stores (NAICS 4482)	$233,329	1	$51,242	$ 182,087	1,549	10	$48,491	0	$0	$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$287,627	0	$6,698	$ 280,929	2,389	12	$74,897	0	$0	$0	0	0	0.00
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$1,488,162	14	$803,337	$ 684,825	5,825	63	$409,456	1	$195,811	$41,258	0	659	14.01
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$961,481	13	$676,217	$ 285,264	2,426	40	$273,140	1	$195,811	$41,258	0	1,019	21.69
Book, Periodical, and Music Stores (NAICS 4512)	$526,681	1	$127,120	$ 399,561	3,398	22	$136,316	0	$0	$0	0	0	0.00
General Merchandise Stores (NAICS 452)	$43,979,004	9	$48,342,846	$ (4,363,842)	(37,115)	1,851	$3,547,269	1	$2,804,048	$252,617	0	136	2.90
Department Stores Excluding Leased Depts. (NAICS 4521)	$11,015,413	1	$7,469,756	$ 3,545,657	30,156	464	$1,308,734	0	$0	$0	0	0	0.00
Other General Merchandise Stores (NAICS 4529)	$32,963,591	8	$40,873,090	$ (7,909,499)	(67,271)	1,388	$2,238,535	1	$2,804,048	$252,617	0	182	3.87
Miscellaneous Store Retailers (NAICS 453)	$2,732,909	16	$1,337,416	$ 1,395,493	11,869	115	$288,129	0	$0	$0	0	0	0.00
Florists (NAICS 4531)	$240,533	2	$151,785	$ 88,748	755	10	$41,503	0	$0	$0	0	0	0.00
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$1,265,535	4	$874,105	$ 391,430	3,329	53	$102,731	0	$0	$0	0	0	0.00
Used Merchandise Stores (NAICS 4533)	$368,237	8	$196,052	$ 172,185	1,464	16	$17,600	0	$0	$0	0	0	0.00
Other Miscellaneous Store Retailers (NAICS 4539)	$858,605	1	$115,474	$ 743,131	6,320	36	$126,295	0	$0	$0	0	0	0.00
Food Services & Drinking Places (NAICS 722)	$26,326,077	32	$16,043,178	$ 10,282,899	41,132	1,108	$2,812,518	7	$3,635,385	$497,181	1	449	9.54
Full-Service Restaurants (NAICS 7221)	$9,079,219	18	$6,077,965	$ 3,001,254	12,005	382	$945,402	4	$1,026,523	$164,708	1	431	9.17
Limited-Service Eating Places (NAICS 7222)	$15,967,590	13	$9,869,509	$ 6,098,081	24,392	672	$1,494,985	3	$2,608,862	$332,474	0	495	10.52
Special Food Services (NAICS 7223)	$835,263	1	$95,704	$ 739,559	2,958	35	$272,840	0	$0	$0	0	0	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	$444,005	0	$0	$ 444,005	1,776	19	$99,291	0	$0	$0	0	0	0.00

Appendix C-1
Retail Locations

Retail Market Analysis
City of Strafford, Missouri



ID	Retail Location
1	Route 66 Sports
2	Family Pharmacy
3	Cars'R'Us
4	Joe's Diner
5	Conoco
6	Kum&Go

0 100 200 400
Feet

N

March 2012

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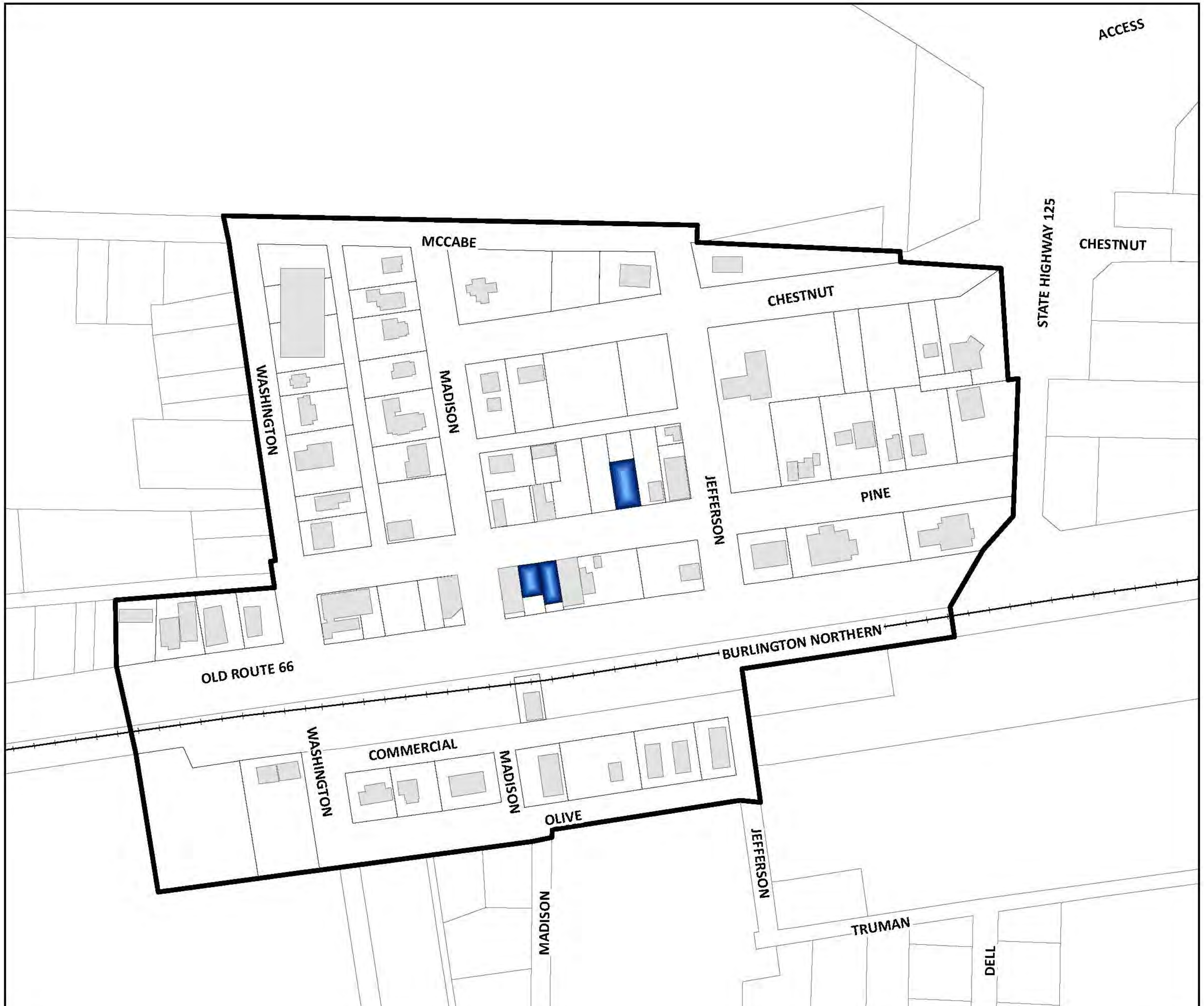
Appendix C-2
Multi-Story Buildings

Retail Market Analysis
City of Strafford, Missouri



Legend

DREAM Boundary

Multi-Story Buildings

0 100 200 400
Feet

N

March 2012

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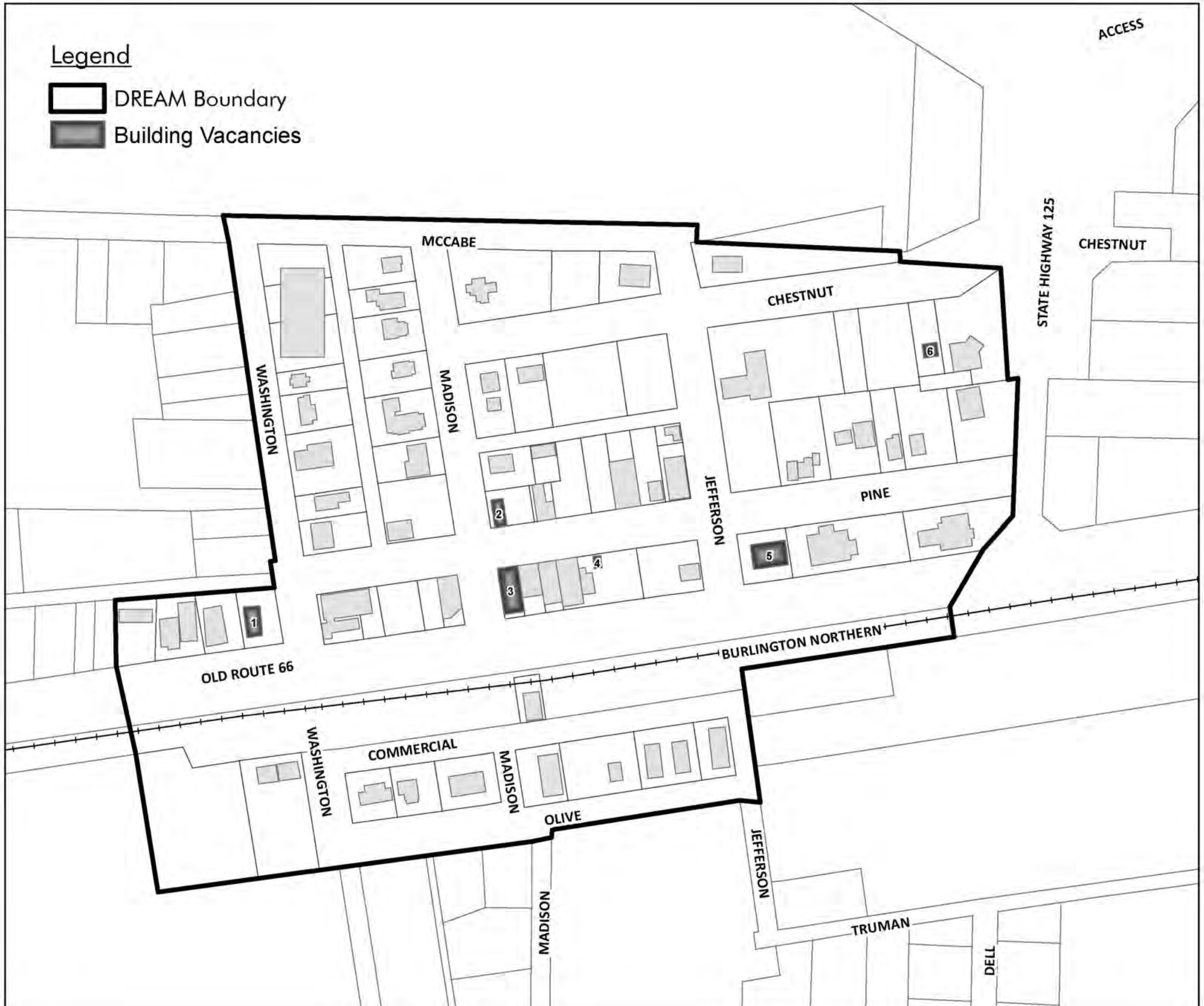
Appendix D
1st Floor Vacancies

Retail Market Analysis
City of Strafford, Missouri



ID	Address	Available Sq.Ft.
1	201 W. Old Route 66	1,450
2	101 E. Pine Street	1,000
3	100 E. Pine Street	3,000
4	118 E. Pine Street	300
5	201 E. Old Route 66	1,300
6	214 E. Chestnut	600

0 100 200 400
Feet

N

March 2012

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Appendix E
Off Street Parking

Retail Market Analysis
City of Strafford, Missouri

Legend
DREAM Boundary
1-5
6-10
11-20
21-30

0 100 200 400
Feet

N

March 2012

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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

- Is the sidewalk clean and level?

  ☐ Yes

  ☐ No

  Description

Exterior Signage:

- Does signage occur at eye level (Pedestrian)?

  ☐ Yes

  ☐ No

  Description

- Does signage occur at car level (Driver)?

  ☐ Yes

  ☐ No

  Description

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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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Existing Store Checklist

Display Windows:

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

  Description

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- 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

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

  ☐ Yes

  ☐ No

  Description

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- Are the window displays lit at night?

  ☐ Yes

  ☐ No

DOWNTOWN REVITALIZATION AND ECONOMIC ASSISTANCE FOR MISSOURI
D·R·E·A·M 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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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

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

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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

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  ____

Merchandising:

- Are the products restocked or re-arranged consistently to make the store feel full?
  - ☐ Yes
  - ☐ No

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

  ____

  ____

  ____

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- 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

  ____
  ____
  ____
  ____

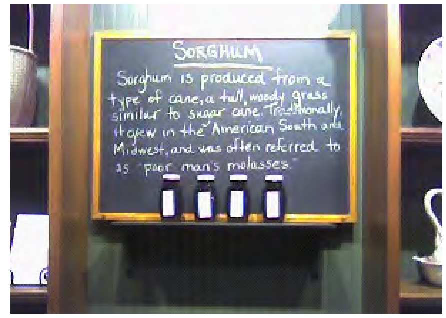
Comfort:

- 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

Existing Store Checklist



Dressing Rooms:

- Are the rooms placed to discourage shoplifting?
  - ☐ Yes
  - ☐ No

Staff:

- Is the staff helpful and cheerful?
  - ☐ Yes
  - ☐ No

  Description

- Is the staff educated about the merchandise?
  - ☐ Yes
  - ☐ No

  Description

- Does the staff suggest other downtown shops to the customers?
  - ☐ Yes
  - ☐ No

  Description

Other Comments.

D·R·E·A·M INITIATIVE