Brookfield, Missouri

Downtown
Revitalization &
Economic
Assistance for
Missouri

Retail Market Analysis

August 2014

PGAV PLANNERS

ACKNOWLEDGMENTS

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EXECUTIVE SUMMARY

This Retail Market Analysis reveals that Downtown could see a significant increase in sales if targeted businesses are added to the retail market. These projections are based on existing sales volumes, vacant floor space and estimated leakage of retail dollars being spent outside of the Downtown and city limits. Downtown Brookfield currently sees a significant portion of its retail dollars leaving the area and being spent in Chillicothe and Columbia, Missouri, with online retailers, and at other locations further away such as St. Louis and Kansas City, Missouri. With the DREAM Initiative, Downtown Brookfield has an opportunity to begin to reverse this trend and continue the revitalization process for Downtown.

The Retail Market Analysis was conducted by analyzing data for three areas: The Downtown Trade Area (DTA) which is the DREAM study area; Primary Trade Area (PTA) which is the city limits; and the Secondary Trade Area (STA) which is a modified 25 minute drive time from Downtown Brookfield (Map exhibit is Figure 3 in the Appendix). The modification of the STA stops at the Linn County line and is intended to represent the limit where a customer would choose the Chillicothe retail market over the Brookfield market. The existing retail market, demographics, and surveys were also documented and analyzed to help define a strategy that takes into account public preferences and strengthens the retail market in Downtown Brookfield.

A review of existing market conditions provides an idea of the possible new and existing business potential for Downtown Brookfield. The DREAM Land Use, Building, and Infrastructure Survey revealed that Downtown Brookfield consists of about 433,200 square feet of existing first-floor commercial space that includes:

- 8,000 square feet of restaurant space (1,800 square feet vacant)
- 101,300 square feet of retail space (34,400 square feet vacant)
- 119,600 square feet of office/service space (2,000 square feet vacant)
- 19,700 square feet of mixed-use space (3,500 square feet vacant)
- 68,200 square feet of Public/Institutional space

The 73,000 square feet of retail/restaurant space is generating about $3.3 million in annual sales (sales do not include auto dealers, gasoline stations or non-store retailers). The retail component of this space is generating about $40 per square foot annually. Although the restaurant portion is generating about $345 per square foot annually, this is an unusually high amount and is skewed by the inclusion of a high-volume, fast-food restaurant. A more appropriate estimate for Downtown restaurant sales is $100 per square foot annually. Using these averages, the 41,700 square feet of vacancy that can be used by retail represents an additional $1.6 to $4.1 million in potential annual sales to the City, depending on the business mix.

The primary opportunity for retail development in Downtown Brookfield is to capitalize on existing residents and visitors and nurture a new and growing visitor base. The lead Downtown group, the Brookfield Main Connection ("BMC"), should encourage temporary retail activity within vacant storefronts until new tenants have been secured. Downtown should also work to attract targeted visitors, especially those traveling the Highway 36 "Way of American Genius." Additionally, the City should consider encouraging service-oriented uses to locate in upper-floor spaces or along side streets, reserving prime, ground-floor spaces along Main Street for retail.

While some stores draw customers from outside of the Primary Trade Area, there are many retail subsectors that are not adequately served within the Secondary Trade Area. This demand and lack of local supply is prompting shoppers to leave the STA to meet their retail needs beyond the Brookfield area in Chillicothe and Columbia, Missouri as well as online. Such unmet retail demand presents an opportunity for Downtown Brookfield to capture more retail dollars.

Table 16 on page 25, lists the retail subsectors for potential growth in Downtown Brookfield. The retail goods and services are classified according to the North American Industry Classification System (NAICS) in industry subsectors. The highest unmet retail demand (expressed in dollars as an amount of additional sales) for the STA lies in the following select retail subsectors:

- Grocery Stores: $4.2 million
- Electronics & Appliance Stores: $1 million
- Full-Service Restaurants: $955,000
- Building Material and Supplies Dealers: $917,000
- Health & Personal Care Stores: $803,000

Satisfying all of the unmet demand being demonstrated could generate almost $10 million dollars in additional sales for Brookfield and represents an addition of about 228,000 square feet of retail space. However, these amounts are not likely to be obtained in Downtown alone. As noted, only 41,700 square feet of space that is suitable for retail or restaurant locations is currently vacant and available. The amount of unmet retail demand illustrates the potential that exists for retail growth in the City of Brookfield, a portion of which Downtown Brookfield could capture.

INTRODUCTION

Downtown Brookfield is the geographic and civic center of the community. The Burlington Northern railroad, which serves Chicago and Kansas City, crosses the center of Downtown at Main Street. Downtown currently attracts a sizable contingent of employees, patrons, and visitors on any given week. Despite this potential customer base for its businesses, Downtown has not fully renewed its potential as a vibrant and successful retail district. To achieve this end, it must attract retail tenants in a strategic fashion, consisting of a variety of shopping, dining, and entertainment opportunities that create synergy and a memorable destination for visitors. As part of its overarching goal of downtown revitalization, the DREAM Initiative provides this analysis and recommendations as a first step towards creating a successful retail environment in Downtown Brookfield.

Modern development trends have diminished the function of the typical American downtown in every day life. As consumers began to favor the use of the automobile, commercial development sought larger parcels of affordable undeveloped land further from the community's historic core. The automobile increased the mobility of the consumer, and increasingly shopping centers with major retailers located in more scattered developments along major roadways. As in most communities, Brookfield's retailers began to locate out along Highway 36, rather than Downtown. Major employers and institutions such as Stanbury Uniforms, Brookfield High School, Walmart, and Brookfield Fabricating also located along these corridors, rather than in Brookfield's core. This dispersion of major employers and retail shop owners away from historic downtowns is accelerated by the increasing popularity of online retail shopping. Online shopping diverts retail demand that would normally have gone to brick and mortar stores.

Downtown Brookfield is fortunate to have maintained its historic architecture and façades. A number of important civic and social service functions are still located Downtown, making it a frequent destination for residents. This status was confirmed through a community telephone survey. Through the establishment of clear goals, strategies and steps for implementation, Downtown has an opportunity to reinvent itself as a retail destination for the area.

BACKGROUND & METHODOLOGY

This report takes a comprehensive approach to quantify the retail demand and supply for the Trade Areas in and around Downtown Brookfield order to identify potential retail services that would be successful. It also recommends appropriate strategies for encouraging Downtown Brookfield retail development. The report consists generally of four parts;

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

As a component from the previous public outreach activities of the DREAM Initiative, surveys were conducted of business owners, City staff, residents and visitors which provide key insights into desirable Downtown Brookfield 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 retail sales of the area, in order to quantify potential unmet demand in Downtown Brookfield. 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.

LIMITS OF STUDY

The Retail Market Analysis is intended to provide a general forecast of the amount and types of retail development that could be supported in the trade area. The assumptions and projections used in the analysis are current and supported through the year 2017. The analysis is meant to provide general strategic direction for developing retail in Downtown Brookfield. This study is not intended to be the sole basis for development decisions.

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 Brookfield 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 Brookfield

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

- Downtown Trade Area (DTA) is Downtown Brookfield as defined by the DREAM Study Area, covering 75 acres and consists of approximately 163 buildings on 20 city blocks. The DTA is analyzed for its current retail market conditions, demographic trends, and anticipated sectors of retail growth. This analysis is utilized in making retail development recommendations for Downtown Brookfield.

- Primary Trade Area (PTA) covers the geographic area within the boundary of the City of Brookfield. 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.

- Secondary Trade Area (STA) covers the geographic area within a 25-minute drive time from Brookfield. The STA has been modified in the Retail Market Analysis to exclude the area near Chillicothe due to the comparatively stronger retail pull for nearby residents. The STA is used in measuring the sectors of unmet retail demand that may be reasonably served by new retail in Downtown Brookfield.

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

TRADE AREA DEMOGRAPHIC SNAPSHOT

To give context to the demographics of each trade area, a baseline is used for comparison. An appropriate baseline for DREAM communities is demographic data for the State of Missouri.

The table below is a snapshot from 2010 of the demographics for Downtown Brookfield, the PTA, STA, and the State of Missouri. The data was obtained from the 2010 United State Decennial Census. The amounts are estimates extrapolated from local census tracts and City of Brookfield information. For comparison, the tables in this report include 2017 projections from a third-party supplier. These are derived from census data and general demographic trends for the State of Missouri.

TABLE 1: 2010 DEMOGRAPHIC SNAPSHOT

	Downtown Brookfield	PTA	STA	State of Missouri
Population	125	4,542	14,361	5,988,927
Average Household Income	$44,714	$39,232	$43,680	$59,157
Housing Units	81	2,280	7,460	2,712,729
Owner Occupied	47%	54%	61%	60%
Renter Occupied	22%	29%	19%	27%
Vacant Units	31%	17%	20%	12%
Median Age	38.2	40.7	43	37.8
19 and Under	30%	28%	27%	27%
20-44	26%	27%	26%	32%
45 and Over	43%	45%	48%	41%

Table 1 indicates that, compared to the State in 2010, the Brookfield area (including Downtown, PTA, and STA) had the following:

- A lower average household income
- A population with an older median age
- A significantly higher housing vacancy rate

This snapshot provides a broad characterization of the demographic composition of the Brookfield area. More detailed analyses of the trade areas are discussed on the following pages.

MARKET PROFILE/DEMOGRAPHIC TRENDS

DOWNTOWN BROOKFIELD (DTA)

Figure 1: Downtown Brookfield

Downtown (defined as the area within Brookfield's DREAM boundary) is roughly 75 acres in size and consists of approximately 163 buildings on 20 city blocks (see Figure 1).

The 2010 Census shows 124 people lived Downtown in 56 occupied housing units for an average of 2.2 persons per occupied unit. The average household income was $44,714. The median age was 38.2 with about 30% of the population being age 19 or younger, 26% between 20 and 44 years of age, and 43% age 45 years or more.

From 2000 to 2010, population (+18%), average household income (+21%), and number of housing units (+15%) all increased. However, so did vacant housing units (+108%). Additionally, the population aged 45 and older increased by a higher rate (+31%) than younger residents, who remained at relatively the same level.

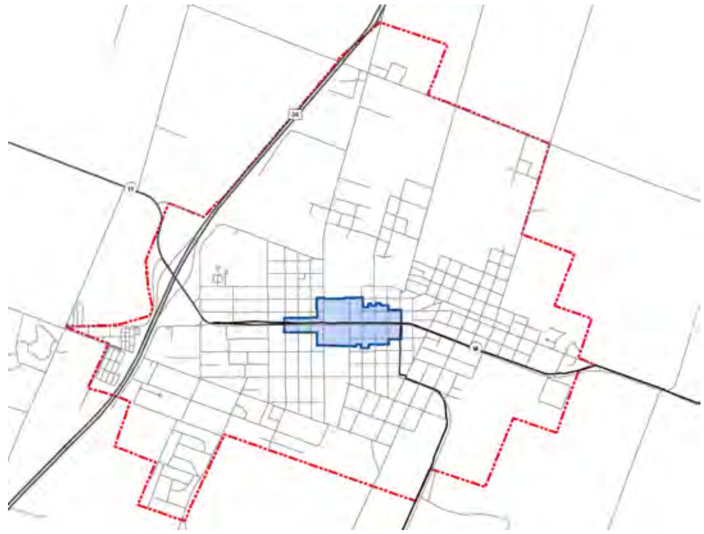
Table 2, below, illustrates current and anticipated demographic trends for the DTA:

TABLE 2: DOWNTOWN BROOKFIELD

	2000	2010	2017	% Change '00-'10	% Change '10-'17
Population	105	124	114	18.1%	-8.1%
Average Household Income	$36,683	$44,714	$48,110	21.9%	7.6%
Housing Units	70	81	78	15.7%	-3.7%
Owner Occupied	41	38	35	-7.3%	-7.9%
Renter Occupied	17	18	16	5.9%	-11.1%
Vacant Units	12	25	27	108.3%	8.0%
Median Age	38.2	38.2	39.6	0.0%	3.7%
19 and Under	32	38	32	18.8%	-15.8%
20-44	34	33	30	-2.9%	-9.1%
45 and Over	41	54	51	31.7%	-5.6%

PRIMARY TRADE AREA (PTA)

Figure 2: Primary Trade Area



City of Brookfield

The 2010 Census shows 4,542 people lived in the PTA (defined as the City limits of Brookfield, as depicted in Figure 2) in 1,892 occupied housing units for an average of 2.4 persons per occupied unit. The average household income was $39,232. The median age was 40.7. About 28% of the population were 19 or younger; 27% of the population between 20 and 44 years of age; and 45% of the population 45 years of age or more.

From 2000 to 2010, the population (-4%) and number of housing units (-4%) in the PTA decreased. A moderate increase in average household income (+19%) is indicated, but this is likely lower than the rate of inflation over this period. Owner-occupied units fell (-16%) with a rise in rented (+12%) and vacant units (+15%).

Table 3, below, illustrates current and anticipated demographic trends for the PTA:

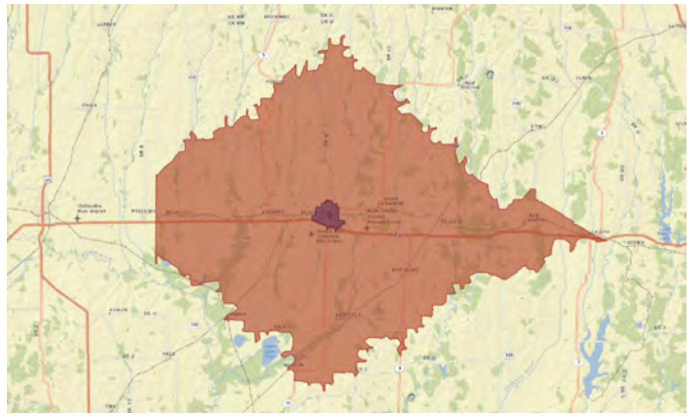
TABLE 3: PRIMARY TRADE AREA

	2000	2010	2017	% Change '00-'10	% Change '10-'17
Population	4,769	4,542	4,481	-4.8%	-1.3%
Average Household Income	$32,855	$39,232	$43,032	19.4%	9.7%
Housing Units	2,394	2,280	2,264	-4.8%	-0.7%
Owner Occupied	1,469	1,231	1,225	-16.2%	-0.5%
Renter Occupied	589	661	628	12.2%	-5.0%
Vacant Units	336	388	411	15.5%	5.9%
Median Age	41.7	40.7	42.8	-2.4%	5.2%
19 and Under	1,269	1,259	1,180	-0.8%	-6.3%
20-44	1,323	1,217	1,155	-8.0%	-5.1%
45 and Over	2,177	2,066	2,148	-5.1%	4.0%

SECONDARY TRADE AREA (STA)

The 2010 Census shows 14,361 people lived in the STA (refer to Figure 3) in 5,978 occupied housing units for an average of about 2.4 persons per occupied unit. Average household income was $43,680. The median age was 43 with approximately 26% of the population age 19 or younger, 26% between 20 and 44 years of age, and 48% age 45 years or more.

Figure 3: Secondary Trade Area



From 2000 to 2010, there was little movement in population. A moderate increase in average household income (+20%) is indicated, but again this is likely lower than the rate of inflation. The most notable change is the drastic increase in vacant housing units (+50%). The median age in the STA is anticipated to trend older which is supported by the decreasing numbers of residents aged 44 years old and younger (-7%) and the increasing number of those 45 and older (+9%).

Table 4, below, illustrates current and anticipated demographic trends for the STA:

TABLE 4: SECONDARY TRADE AREA

	2000	2010	2017	% Change '00-'10	% Change '10-'17
Population	14,343	14,361	13,988	0.1%	-2.6%
Average Household Income	$36,390	$43,680	$47,166	20.0%	8.0%
Housing Units	6,910	7,460	7,404	8.0%	-0.8%
Owner Occupied	4,579	4,529	4,389	-1.1%	-3.1%
Renter Occupied	1,344	1,449	1,433	7.8%	-1.1%
Vacant Units	987	1,482	1,582	50.2%	6.7%
Median Age	40.6	43.0	44.9	5.9%	4.4%
19 and Under	3,963	3,812	3,552	-3.8%	-6.8%
20-44	4,103	3,687	3,454	-10.1%	-6.3%
45 and Over	6,276	6,862	6,982	9.3%	1.7%

STATE OF MISSOURI

As of 2010, nearly six million people lived in the State of Missouri in approximately 2.7 million housing units. The average household income was $59,157. The median age was 37. About 27% of the population were age 19 or younger; 32% between the ages of 20 and 44; and 41% age 45 years or more. Table 5 illustrates demographic information and future trends for the State of Missouri.

TABLE 5: STATE OF MISSOURI

	2000	2010	2017	% Change '00-'10	% Change '10-'17
Population	5,595,211	5,988,927	6,205,424	7.0%	3.6%
Average Household Income	$49,956	$59,157	$66,137	18.4%	11.8%
Housing Units	2,442,017	2,712,729	2,712,729	11.1%	0.0%
Owner Occupied	1,543,354	1,633,610	1,690,931	5.8%	3.5%
Renter Occupied	652,018	742,001	803,442	13.8%	8.3%
Vacant Units	246,643	337,118	411,316	36.7%	22.0%
Median Age	36.1	37.8	38.6	4.7%	2.1%
19 and Under	1,594,172	1,601,411	1,605,234	0.5%	0.2%
20-44	1,995,800	1,937,372	1,956,613	-2.9%	1.0%
45 and Over	2,005,239	2,450,144	2,643,577	22.2%	7.9%

DEMOGRAPHIC COMPARISON

Tables 6, 7, and 8 on the following pages compare demographic changes for the trade areas and the State of Missouri.

Table 6 shows changes in population, average household income, and median age.

Table 7 gives a further comparison of age demographic trends. These trends depict a growing population over the age of 45, with a declining younger population. The aging trends are stronger for the Trade Areas compared with the State. These trends have an impact on what products retailers should offer over the next few years.

Table 8 depicts, with the previously noted exception of Downtown, the Trade Areas have seen an increase in housing units over the past decade. More occupied housing units have been renter occupied rather than owner occupied. This trend is likely a product of the continued depressed housing market and is anticipated to continue as the economy slowly recovers and as the Trade Areas have a need for more senior housing.

In Table 6, population movement into Downtown Brookfield grew from 2000 to 2010 at a rate more than twice that of the State. In contrast, the PTA saw a modest loss of population and the STA stayed relatively stable. Looking forward to 2017, all three trade areas are anticipating varying levels of population loss.

TABLE 6: DEMOGRAPHIC COMPARISON

	Population % Change		Average HHI % Change		Median Age Change (in years)	
	00-'10	10-'17	00-'10	10-'17	00-'10	10-'17
Downtown	18.1%	-8.1%	21.9%	7.6%	0.0	1.4
PTA	-4.8%	-1.3%	19.4%	9.7%	-1.0	2.1
STA	0.1%	-2.6%	20.0%	8.0%	2.4	1.9
State	7.0%	3.6%	18.4%	11.8%	1.7	0.8

Average household incomes grew at similar rates across all three trade areas in the last decade narrowly outperforming the State. Moving into 2017, average household income growth is anticipated to be nearly half its previous rate with the exception of Downtown which is anticipated to stay the same. As previously noted, these income increases did not keep up with the rate of inflation (27%) from 2000 to 2010.

Median age of residents in Downtown Brookfield remained stable over the past decade while the PTA grew slightly younger and the STA aged by 2.4 years. Looking to 2017, the trade areas are anticipated to increase their median age at a higher rate than the State.

TABLE 7: TRADE AREA AGE COMPARISON

	19 & Under Change		20-44 Change		45 & Over Change	
	00-'10	10-'17	00-'10	10-'17	00-'10	10-'17
Downtown	18.8%	-15.8%	-2.9%	-9.1%	31.7%	-5.6%
PTA	-0.8%	-6.3%	-8.0%	-5.1%	-5.1%	4.0%
STA	-3.8%	-6.8%	-10.1%	-6.3%	9.3%	1.7%
State	0.5%	0.2%	-2.9%	1.0%	22.2%	7.9%

In Table 7, the number of residents in Downtown Brookfield aged 19 and younger grew at a very high rate while the PTA and STA had a slight loss. Looking forward, it is anticipated Downtown Brookfield will lose almost all its gains in this age group moving into 2017 and the losses in the PTA and STA will accelerate as well. These local trends are reflected in the reduced growth of this same age group statewide.

Residents aged 20 to 44 years old reduced their numbers in every trade area and the State. This reduction is anticipated to continue except for the State which is anticipated to see a slight gain.

The number of residents aged 45 and older have grown in Downtown Brookfield, the STA, and the State over the last ten years. In contrast, the PTA lost some of its residents in this age group. Looking to 2017, it is anticipated that this age cohort will shift out from Downtown Brookfield into the PTA and to a slightly lesser degree, the STA.

TABLE 8: TRADE AREA HOUSING UNITS COMPARISON

	Housing Units Change	Owner Occupied Change	Renter Occupied Change
	00-'10	00-'10	00-'10
Downtown	15.7%	-7.3%	5.9%
PTA	-4.8%	-16.2%	12.2%
STA	8.0%	-1.1%	7.8%
State	11.1%	5.8%	13.8%

Table 8 shows an increase in the number of housing units in Downtown Brookfield and the STA, with a modest loss in the PTA. The number of owner-occupied units dropped in the trade areas, although the State saw net growth in owner-occupied homes. In contrast, renter-occupied units saw an increase in all three trade areas and in the State overall. Although the total number of housing units has increased in Downtown Brookfield during the last decade, many of those units are now vacant or have been converted to rental units. As the national housing market recovers, Downtown Brookfield must work to market and fill these vacant housing units.

HOUSING MARKET ANALYSIS SUMMARY

For Downtown to have a healthy retail district, it is important that residents live within walking distance of its businesses to provide a regular customer base, activity on Downtown sidewalks, and watchful eyes when businesses are closed.

The Missouri Housing Development Commission (MHDC) conducted a Residential Demand Analysis in September 2012 that projected residential demand for Brookfield, with a focus on Downtown. The Residential Demand Analysis concluded the market could absorb 14 additional market rate rental units, 9 affordable senior housing units, and 34 affordable family rental housing for a total of 57 rental units. The report also noted that there was some demand for new housing construction, especially once the housing market begins to improve. The analysis noted that Brookfield is projected to see a gradual population growth over the next few years. This trend, along with the continued improvements to the Downtown area may provide an opportunity to see some conversion of upper floor spaces to residential units once the housing market improves.

Benefits to improving the Downtown housing market include: utilizing vacant upper-floor space and 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. The Downtown housing market appears to have a good demand as evidenced by high occupancy rates and investment activity.

There are currently a significant number of buildings with vacant space on the second or third floors. While some of this space could be encouraged for office and service, some should be used for residential conversions. Converting this vacant space to residential units could work toward meeting the 57 unit demand for rental apartments as estimated by the Residential Demand Analysis.

In addition to new residential development, Downtown Brookfield should preserve and improve its existing residential neighborhoods. Through continued code enforcement and investment in infrastructure such as streets, sidewalks, street trees, and streetlights, the City can help improve its neighborhoods. Prioritizing improvements near Downtown will demonstrate the City's commitment to maintaining its historic areas and will encourage continued reinvestment by existing property owners and potential new investors. Strengthening and expanding the existing residential market in and around Downtown will provide immediate results to retailers by increasing the nearby consumer base.

CONSUMER SEGMENTS

The first step in analyzing how to increase the retail market in Downtown is to identify which consumer segments are currently patronizing Downtown businesses and which consumer segments are likely to patronize Downtown businesses in the future. Once these segments are identified, Downtown Brookfield can identify their needs and work toward servicing these segments. According to the research for this report, there are four broad categories of consumers Downtown Brookfield serves:

Downtown Employees

- Downtown is home to over 530 employees working at 95 businesses.
- This equates to a potential annual economic impact of:
    - 530 x $15 weekly would = nearly $413,400 a year spent by Downtown employees.
- Demand for restaurants and food services at lunch and early evenings.
- Additional demand for convenience items and after hours shopping.
- Frequent customer reward programs and repeat business marketing efforts can be effective when targeting this segment.

Downtown Residents

- There are an estimated 124 residents Downtown.
- Buying demands of this segment can be greatly served with retailer product differentiation and improved store hours.
- This segment looks to buy convenience items and basic necessities.
- As is the case with the Downtown employees, frequent customer reward programs and repeat business marketing efforts are likely to be effective in targeting this segment.

Brookfield Residents

- This segment represents larger potential customer base than the Downtown resident segment, with a total population of 8,319 citywide (PTA) according to the 2010 Census.
- They visit Downtown for a variety of reasons including conducting business, shopping, and dining.
- Although shopping and dining may not be the primary reason for Brookfield residents to visit Downtown, their presence increases foot traffic and creates a more active environment.
- Effective strategies for this segment are to inspire brand loyalty through targeted marketing and customer incentives and by providing expanded product selection for daily and weekly necessities.

Tourists - Visitors

- Brookfield attracts visitors to its Balloon Derby and during the hunting season. Visitors look for unique experiences and products that they cannot find back home.
- They desire a variety of entertainment and dining options.
- This segment often needs convenience items.
- Strategies for serving this market segment include improved way-finding to Downtown and effectively developing and marketing the "Downtown Brookfield brand" as a unique experience worthy of a visit.
- Downtown and its retailers have an opportunity to increase their sales through building on existing successful attractions and events.

COMMUNITY SURVEY

In order to gather information about perceptions and desires for Downtown Brookfield, the DREAM Initiative conducted a telephone survey of residents. Those surveyed detailed what they liked or did not like about Downtown and whether the area was headed in the right or wrong direction. They also gave suggestions on what businesses and improvements should be prioritized to improve Downtown and make it more appealing. The full findings and results of the survey may be found in the *Community Telephone Survey Report*. Findings include:

- Respondents placed the highest priority on "revitalizing the Brookfield Downtown area" as an improvement.
- Nearly 90% of respondents indicated they visited Downtown at least once a month and most indicated they visit for Government offices or the Post Office.
- Older respondents (50 or older) were more interested in family and casual dining style, while younger respondents (ages 18 to 34) were more likely to be interested in fine dining.
- The majority of respondents placed the highest priority on adding dining options to Downtown.
- Although when asked to pick one business respondents would most want to see in Downtown, 18 to 34 year olds chose "arcade or other attraction aimed at teenagers," while older respondents were more likely to answer "family or casual style dining."
- Respondents who had lived in Brookfield for more than 20 years tended to be more interested in "family and casual dining style dining."

Figure 4, below, shows the only high priority business type indicated by at least 50% of the Community Telephone Survey respondents was Family and Casual-Style Dining, with other options showing a lesser priority. Providing a focus on improving dining options can be important for other businesses. Demand for full-service and limited service restaurants is indicted in the Market Research section of this report, in Table 16 on page 25.

Figure 4: Downtown Business Preferences
Community Telephone Survey

Casual/Family Dining	50%
Fine Dining	38%
Clothing Stores	33%
Arcade/Youth Attraction	29%
Sporting Goods Store	21%
Coffee/Donut Shop	19%
Ice Cream Shop	17%
Lodging	15%
Arts and Crafts Store	12%
Art Galleries and Shops	11%
Antique Stores	8%
Bar/Nightclub	5%

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BUSINESS MARKET

The City of Brookfield, and surrounding area, have a diverse local economy providing stability and a solid base for future economic development. Economic development efforts should continue to be an important part of Brookfield's growth strategy. Table 9 illustrates the total estimated employment in 2010 for the Trade Areas.

TABLE 9: 2010 TOTAL EMPLOYMENT

	Downtown Brookfield	PTA	STA
Employees	530	1,997	4,535
Businesses	95	240	638

Downtown remains an employment center, particularly in the areas of manufacturing and medical services. The largest single employer is Stanbury Uniforms Inc. The City is also home to a few manufacturers that create a significant amount of jobs. The largest employers in Brookfield are listed in Table 10 below.

TABLE 10: Brookfield Employers

Company Name	Industry	Employment
Stanbury Uniforms Inc	Manufacturing	250
Pershing Memorial Hospital	Medical	175
Brookfield Fabricating Corp	Manufacturing	140
Life Care Center of Brookfield	Medical	119
Brookfield Elementary School	Education	75
Mc Larney Manor	Medical	75
Mc Donald's	Restaurant	47

COMPARATIVE MARKET ANALYSIS

The employment base in the Brookfield trade areas primarily consist of four sectors:

- Healthcare and Social Assistance
- Public Administration
- Wholesale Trade
- Manufacturing

Brookfield's Downtown is a core business center and generates a significant amount of activity from local government offices and regional employers in manufacturing and medical fields. There is also activity generated from limited shopping and dining options, and special events. Downtown Brookfield is faced with a unique challenge to strategically refill its storefronts in the face of modern big-box development and the nearly ubiquitous preference of retailers to have highway visibility. For instance, one new restaurant, the new Brickhouse Bar & Grill, and a movie theater, the Reeltime Cinema, are both located south of Downtown Brookfield and visible from Highway 36. Two major traffic drivers, the Wal-Mart Supercenter and Orscheln's Farm and Home are located adjacent to Highway 36 as well. Green Hills Pharmacy's departure from Main Street to a location closer to Highway 36 further underscores the challenge posed by auto-centric development to Downtown Brookfield's revitalization.

Beyond the City's retail offerings, those in the STA are apt to shop online or in nearby Chillicothe, Columbia, or farther away in St. Louis or Kansas City. If the Brookfield Main Connection takes up the task of marketing available Downtown space and nurturing and attracting potential retail tenants to vacant storefronts, it must do so in a strategic way that considers the above realities regarding local consumers' shopping behavior.

TENANT MIX & LAND USE

Table 11, on the following page, shows information collected during the DREAM Land Use, Building & Infrastructure Survey task; conducted in 2010 and subsequently updated with assistance from City staff and the Brookfield Area Growth Partnership (BAGP). Table 11 identifies a total of 171 parcels on which 162 primary buildings are located that represent approximately 433,200 square feet of first-floor space. Thirty-eight of these buildings were identified as retail or restaurant uses representing 109,200 square feet of space. About 36,000 square feet of the retail and restaurant space was vacant (16.7%).

Fifty-two office and service buildings and seven mixed-use structures represent about 139,300 square feet of space with almost 5,600 square feet of vacancy (19%). A relatively high percentage (16%) of overall commercial space was vacant with an even higher percentage (34%) of retail space vacancy. This situation indicates that Downtown has difficulty attracting retailers to fill available spaces and may be due to a number of factors such as a lack of retail customers, inferior spaces, or poor business owner investment interest. Table 11 also indicates the overall square footage of first-floor space in Downtown Brookfield is composed of 11% residential, 15% industrial, 27% office/service, 15% public/institutional, 4% mixed-use, and 25% retail and restaurant. Retail and restaurant uses are critical to establishing a vibrant Downtown atmosphere. However, in Downtown Brookfield, non-retail uses account for 75% of the available space. The BMC should continue to market and encourage existing Downtown businesses. However, the City of Brookfield may need to develop financial incentives for building rehabilitations and business start-ups to help attract new businesses to Downtown. Other measures such as adjusting zoning codes to preserve prime, first-floor spaces for retail/restaurant use or encouraging the conversion of office/service spaces into retail/restaurant uses should be considered carefully for their impact on the Downtown market.

TABLE 11: LAND USE TOTALS & SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Residential					
Single-Family	21	20	28,734	2,668	9.3%
Multi-Family	7	7	19,307	807	4.2%
Sub-Total	**28**	**27**	**48,041**	**3,475**	**7.2%**
Commercial					
Office / Service	54	52	119,564	2,070	1.7%
Retail	32	33	101,322	34,400	34.0%
Restaurant	5	5	7,895	1,750	22.2%
Sub-Total	**91**	**90**	**228,781**	**38,220**	**16.7%**
Mixed-Use	6	7	19,693	3,500	17.8%
Industrial	13	21	68,484	5,900	8.6%
Public / Institutional	15	17	68,208	0	0.0%
Recreation	4	NA	NA	NA	NA
Parking Lot	4	NA	NA	NA	NA
Vacant Lot	10	NA	NA	NA	NA
TOTAL	**171**	**162**	**433,207**	**51,095**	**11.8%**

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

* Building Square Footage is for 1st Floor.

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MARKET RESEARCH FINDINGS

RETAIL ANALYSIS

A review of existing market conditions provides an idea of the possible new and existing business potential for Downtown Brookfield. As noted, Downtown contains 433,200 square feet of existing first-floor space that includes:

- 8,000 square feet of restaurant space (1,800 square feet vacant)
- 101,300 square feet of retail space (34,400 square feet vacant)
- 119,600 square feet of office/service space (2,000 square feet vacant)
- 19,700 square feet of mixed-use space (3,500 square feet vacant)
- 68,200 square feet of Public/Institutional space

The retail/restaurant space is generating about $4.8 million in annual sales (sales do not include auto dealers, gasoline stations or non-store retailers). The retail component of this space is generating about $40 per square foot annually. Although the restaurant portion is generating about $345 per square foot annually, this is an unusually high amount and is skewed by the inclusion of a high-volume, fast-food restaurant. A more appropriate estimate for Downtown restaurant sales is $100 per square foot annually. Using these averages, the 41,700 square feet of vacancy that can be used by retail represents an additional $1.6 to $4.1 million in potential annual sales to the City, depending on the business mix.

Table 12, below, provides a breakdown of some of the existing retail establishments in Downtown Brookfield, PTA, and STA.

TABLE 12: RETAIL ESTABLISHMENTS

	Downtown Brookfield		Primary Trade Area		Secondary Trade Area	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
Retail (Pedestrian-Generating Businesses) Trade Summary	12	0	33	153	78	530
TOTALS:	17	90	46	326	100	808
Furniture & Home Furnishings Stores	0	0	1	1	1	1
Electronics & Appliance Stores	2	5	2	6	2	6
Bldg. Materials & Garden Equipment & Supplies	1	6	7	32	15	63
Food & Beverage Stores	1	7	4	37	9	85
Health & Personal Care Stores	0	0	1	10	3	21
Clothing & Clothing Accessories Stores	2	4	3	5	4	7
Sporting Good, Hobby, Book & Music Stores	0	1	1	3	5	14
General Merchandise Stores	0	1	1	5	3	211
Miscellaneous Store Retailers	3	6	5	12	14	40
Arts, Entertainment & Recreation	2	13	3	25	11	66
Accommodation	2	10	4	10	6	21
Food Services & Drinking Places	4	37	14	180	27	273
Total Businesses (including non-retail)	94		240		638	
Total Employees (including non-retail)	522		1,997		4,535	
Total Residential Population	124		4,542		14,361	
Employee/Population	4.21		0.44		0.32	

Table 13, below, lists major businesses in Downtown Brookfield. The retail services listed in Tables 12 and 13 are organized according to the NAICS to allow for comparison of retail activity by sectors. Recommendations can then be developed for specific retail uses and establishments to target in attraction efforts. Due to differences in allocating businesses to various categories, these tables may not match completely. The tables indicate Downtown Brookfield is a significant destination for restaurants and drinking establishments as well as individual retailers in other sectors. This is an asset that Downtown Brookfield should continue to develop and advertise while at the same time working to nurture a wider array of retail businesses.

TABLE 13: EXISTING RETAIL

NAICS Industry Group	Store Name
Automotive	Linn County Machine & Supply O'Reilly Auto Parts
Electronics & Appliance Stores	Beigel's Chariton Valley Wireless
Building Materials, Garden Equip. & Supply	Hometown Hardware Quinn Lumber
Furniture & Home Furnishings Stores	Cabin Creek Candles and Rustic Decor Keep it Simple Willow Creek Rustic Furniture
Arts, Entertainment and Recreation	Brookfield Bowl
General Merchandise Stores	Sears
Health & Personal Care Stores	Hearing Aids
Book, Periodical, and Music Stores	Elliot Music
Clothing	Tooey's Clothing
Florists	Kelley's Printing & Petals
Office Supplies, Stationery, and Gift Stores	NCM Graphics
Other Miscellaneous Store Retailers	7th Heaven
Used Merchandise Stores	The Time Warp
Food Services & Drinking Places	Top Hat Saloon Helm Street Inn Tastee Treat A Step Back in Time Pigskin BBQ & Pub

The spending habits of consumers in the trade areas help form the basis for the determination of retail demand. Estimating average annual household spending per retail sector provides insight into the demand for particular retail services within a given trade area. Table 14, on the following page, provides annual household consumer expenditures for seven main categories and several sub-categories of retail expenditures.

TABLE 14: CONSUMER EXPENDITURES

	Downtown Brookfield	Primary Trade Area	Secondary Trade Area
Average Household Income	$44,714	$39,232	$43,680
Average Annual Household Expenditures for Selected Retail Sectors			
Food	**$5,028**	**$4,843**	**$5,143**
Food at Home	$2,920	$2,881	$3,100
Food Away from Home	$2,108	$1,962	$2,043
Apparel and Services	**$1,076**	**$995**	**$1,015**
Household Merchandise	**$1,062**	**$994**	**$1,057**
Electronics	$261	$235	$242
Household Goods	$801	$759	$816
Household Care	**$238**	**$239**	**$295**
Transportation	**$2,554**	**$2,544**	**$2,824**
Health & Personal Care	**$736**	**$758**	**$854**
Health Care	$479	$512	$592
Personal Care Products	$257	$246	$261
Entertainment & Recreation	**$2,632**	**$2,540**	**$2,769**
Total for selected sectors	**$13,325**	**$12,912**	**$13,957**

Table 14 shows the largest portion of expenditures are spent on food (at home and away from home), entertainment and recreation, and transportation. Residents in the trade areas spend approximately 40% of food expenditures on food away from home. Downtown Brookfield has the largest average household income of the trade areas, with the STA just slightly lower. Across all the listed retail sectors, annual average expenditures are substantially similar. Given that the STA average household income is nearly four thousand dollars more than that of Brookfield residents outside Downtown, the best opportunity for retail sales growth in Downtown Brookfield will come from encouraging consumers from the STA as well as traveling parties from outside the area.

Table 15, on the following page, shows the number of households at regular income thresholds. The PTA and STA have a much larger number of households with higher income levels and consequently more potential disposable income. Determining the retail sectors that both have unmet demand and appeal to residents of the PTA and STA will help Downtown focus their retail expansion and attraction efforts and hopefully capture more locally spent retail dollars. Targeting the residents of these households with marketing efforts will be an important component in expanding the Downtown retail base.

TABLE 15: HOUSEHOLD INCOME

Income Level	Downtown Brookfield	Primary Trade Area	Secondary Trade Area
Less than $ 15,000	9	392	1,077
$ 15,000 - $24,999	8	377	1,074
$ 25,000 - $34,999	7	298	855
$ 35,000 - $49,999	8	318	1,037
$ 50,000 - $74,999	16	323	1,109
$ 75,000 - $99,999	4	84	461
$ 100,000 - $149,999	1	90	260
$ 150,000 - $199,999	0	2	49
$ 200,000 +	0	7	37
Total	53	1,891	5,959

POTENTIAL STORE SPACE SUPPORTED

The primary opportunity for retail development in Downtown Brookfield is to capitalize on residents in the STA and traveling parties on Highway 36. To reach both of these markets, the BMC should use the Marketing Toolkit produced through the DREAM Initiative. Additionally, the City should consider encouraging service-oriented uses to locate in upper-floor spaces or along side streets, reserving prime, ground-floor spaces along Main Street for retail. While some stores within a number of retail sectors draw customers from outside the PTA, there are several sectors that are not adequately served within the STA. This demand and lack of local supply is prompting shoppers to leave the STA to meet their retail needs beyond the Brookfield area as well as online. Such unmet retail demand presents an opportunity for Downtown Brookfield to capture more retail dollars.

On the following page, Table 16 shows the unmet demand (the difference between retail demand and actual sales) for retail categories in order of descending opportunity. Using the total unmet retail demand within the STA, the average retail sales per square foot ($40), and the average restaurant sales per square foot ($100) an estimated 228,000 additional square feet of retail/restaurant space could be developed in the STA. Meeting all of this unmet retail demand in the City could generate nearly $10 million dollars in additional sales. Locating the additional 228,000 square feet of retail/restaurant space in Downtown Brookfield is unlikely as the existing available space that is usable by retail or restaurant uses is 41,700 square feet. However, this amount of unmet retail demand does demonstrate an opportunity for retail growth in the City of Brookfield, with Downtown filling its vacancies and capturing a portion of this new retail.

TABLE 16: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Possible Retail Area (sq.ft.) Supported[2]
Grocery Stores (NAICS 4451)	$ 4,158,203	102,950
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$ 1,021,569	25,292
Full-Service Restaurants (NAICS 7221)	$ 954,565	9,588
Building Material and Supplies Dealers (NAICS 4441)	$ 917,061	22,705
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$ 802,663	19,873
Specialty Food Stores (NAICS 4452)	$ 530,738	13,140
Furniture Stores (NAICS 4421)	$ 321,064	7,949
Other Miscellaneous Store Retailers (NAICS 4539)	$ 211,690	5,241
Clothing Stores (NAICS 4481)	$ 191,741	4,747
Home Furnishings Stores (NAICS 4422)	$ 147,887	3,661
Special Food Services (NAICS 7223)	$ 132,698	1,333
Beer, Wine, and Liquor Stores (NAICS 4453)	$ 131,562	3,257
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$ 121,039	2,997
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$ 86,116	2,132
Used Merchandise Stores (NAICS 4533)	$ 60,952	1,509
Shoe Stores (NAICS 4482)	$ 44,674	1,106
Limited-Service Eating Places (NAICS 7222)	$ 42,420	426
Drinking Places - Alcoholic Beverages (NAICS 7224)	$ 14,708	148
TOTAL	**$ 9,891,350**	**228,055**

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

[2] Based on $40 in retail sales per square foot, $100 in restaurant sales per square foot, and existing retail building inventory and activity in Downtown Brookfield.

Not all of the unmet demand shown in Table 16 is sufficient to support a store in Downtown Brookfield. Due to market forces, consumer trends, or space requirements some of the amounts being demonstrated may need to be met by existing retailers. Key sectors from Table 16 demonstrating high-growth potential for Downtown, include:

- *Grocery Stores.* This sector is comprised of supermarkets and grocery stores that retail general lines of food. It may also include delicatessens or other stores which sell grocery items and meats. For example, one possibility for Downtown Brookfield would be to explore the appetite of producers of quality local foodstuffs such as the local Mennonite community in establishing a brick-and-mortar presence on Main Street.

- *Electronics & Appliance Stores.* These products could be combined with, or added to, furniture stores. An electronics or appliance store can be a successful Downtown anchor. Stores of this type may include a showroom that can decrease their sales per square foot. However, stores such as mobile phone stores can occupy a small location, but also generate sizeable sales.

- *Full-Service Restaurants.* This sector is comprised of eating establishments where the patrons are served and eat while seated. Important to note is a key point from the Telephone Survey conducted for Downtown Brookfield that indicated respondents listed dining options as the highest priority. The success of the nearby Brickhouse Bar & Grill should indicate the pent-up demand for full-service restaurants in the area.

- *Building Materials and Supply Stores.* While demonstrating significant unmet retail demand, these stores are not generally viewed as tourism shopping destinations. Additionally, Downtown locations are typically not suitable for stores that carry these types of products. However, due to the sizable amount of sales that could be captured, Downtown should consider smaller versions of these stores specializing in hardware or home repair items that do not require the floor space of lumber or other building materials.

- *Health & Personal Care Stores.* This sector is comprised of pharmacies, cosmetics, beauty supplies, optical goods, or health supplements. After surveying the market, including the nearby stores of Wal-Mart, Green Hills Pharmacy and others in Chillicothe and Columbia, potential store operators may be able to find a niche in this sector.

- *Specialty Food Stores.* This sector is comprised of retailers selling miscellaneous specialty foods. Example establishments may be stores specializing in spices, coffee, tea, dairy, ice cream, and other gourmet food items. Some demand for this type of store is being demonstrated and market studies of existing offerings in Brookfield, Chillicothe, and Columbia indicate there may be interest in such gourmet food items. However, potential store concepts should be tested before new stand-alone stores are introduced to the Downtown Market. Potential methods to test these products include a "pop-up" store format or adjustment of product lines at existing stores.

Potential store concepts should not be limited to these individual sectors. Through thoughtful curating, it may be possible to design a store concept that combines several retail goods from several sectors using a presentation that is appealing to its target customer. For example, a boutique that offers a selection of spices, teas, coffee, specialty kitchen utensils, cookware, home furnishings and decor, candles, stationary, gourmet pet treats, craft supplies, and wall art draws from across the above sectors but could be presented in such a way, and at the right price point, to be attractive to STA residents and tourists.

DOWNTOWN BROOKFIELD RETAIL GOALS

- IDENTIFY LOCAL CHAMPION OF DOWNTOWN RETAIL DEVELOPMENT

  It will be important to establish who will fulfill the leadership role in retail development for Downtown Brookfield. Depending on its reactivation, first consideration may be given to BMC or perhaps the BAGP in the interim. Whoever the lead entity will be, their primary role will be to utilize this assessment of the retail market in Downtown Brookfield and consider implementation of the recommendations contained in this document as well as the templates and best practices provided in the separate Marketing Toolkit.

- ENCOURAGE TARGETED RETAIL USES AND MIX

  The BMC should develop a list of targeted retail uses based on the sectors highlighted in Table 16 on page 25 of this analysis and as identified by respondents in the DREAM Community Telephone Survey. The dual focus of retail business attraction activities should be to fill vacancies and put in place the appropriate mix of retail uses. The appropriate mix is partially determined by the opportunity to grow Downtown Brookfield's existing cluster of eating and drinking establishments, understanding the opportunities presented by niche markets that are not satisfied by local retailers and others further away in Chillicothe or Columbia, and by marketing Downtown Brookfield to traveling families along Highway 36.

- INCREASE BUSINESS RETENTION & EXPANSION

  As the BMC works toward attracting targeted retail uses as described above, BAGP and the Chamber should also collaborate to retain and grow existing retail businesses. Regular conversations should be maintained with property and business owners in order to anticipate impending lease renewals, vacancies, business operations challenges, and hopefully business expansion needs.

- SUPPORT EXISTING BUSINESSES THROUGH CONTINUING EDUCATION

  The BMC, possibly in cooperation with BAGP and the Chamber, should consider the creation of a merchant education program to address issues of promotions, customer service, business and building maintenance, retail opportunities, and trends. General business issues such as marketing, store hours, and store display and design should be covered as well as opportunities for more detailed assistance. Clusters of similar businesses, such as restaurants, should be brought together to present specific topics.

- INCREASE MARKETING & COLLECTIVELY MARKET DOWNTOWN RETAILERS

  Since much of the potential growth projected in this analysis hinges on sales generated from residents in the STA and tourists, stakeholders in Downtown Brookfield should consider promotional efforts that target local residents, those within the 25-minute drive time market area, and those traveling along Highway 36. Using funds generated by the establishment of a Community Improvement District (CID) or other funding source, a cooperative advertising campaign should be pursued on behalf of Downtown retailers.

- DEVELOP A DOWNTOWN DIRECTORY

  Develop a brochure detailing the Downtown retailers and restaurants including the type of merchandise and eateries, contact information, locations, and hours of stores. This effort should work in cooperation with lodging and visitor activity centers along Highway 36.

- USE DOWNTOWN EVENTS TO INCREASE DOWNTOWN CUSTOMER BASE

  Create events such as sidewalk sales, monthly evening shopping nights, storefront display contests, etc. that are focused on shopping in Downtown. Shopping oriented events help to promote Downtown Brookfield as a retail shopping destination experience.

- IMPROVE THE CONNECTION BETWEEN HIGHWAY 36 AND MAIN STREET

  Brookfield is located at the midpoint between St. Joseph and Hannibal, MO along The Way of American Genius, Highway 36. The Highway's Heritage Alliance, in cooperation with MODOT, has the organizational structure to market communities along the way. This presents a compelling opportunity for Brookfield to grow and market its own amenities to travelers along Highway 36. It is important that visitors to these attractions feel connected and invited to discover Brookfield and, in turn, Main Street. There are opportunities to improve wayfinding signage, the overall continuity of Main Street, and promotional efforts through established Highway 36 Heritage Alliance networks.

- 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. The Twin Parks Revitalization project is a positive first step toward improving the rest of Downtown Brookfield.

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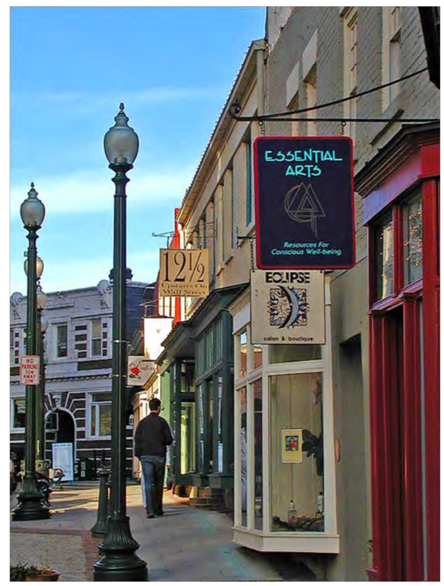
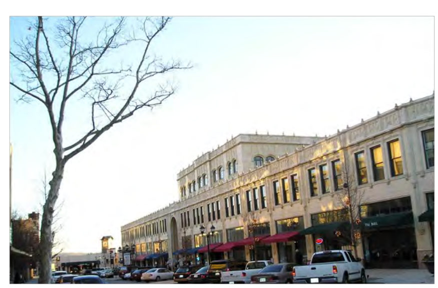
Downtown Brookfield Strategies

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 provide a mix of 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; and
- streetscape maintenance.

PUBLIC SPACES

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

- Be easily accessible and visible from the street

- Preserve and maintain trees and landscaping that provide shade color and natural edges.
- Create a pedestrian-friendly amenity area and activity space for special events. Public spaces should be flexible to accommodate a variety of multi-purpose events.

- Introduce flexible, moveable seating to complement traditional park benches.
- Enforce cleanliness and maintenance standards.
- Provide regulatory park signage and the authority to enforce regulations.
- Be safe.

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.

Downtown Environment & Appearance

Downtown Brookfield'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 Brookfield. 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 Brookfield'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.

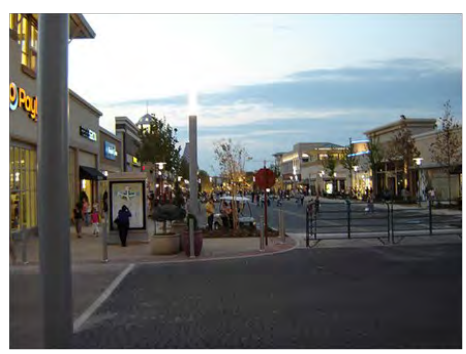
- Support code enforcement and plan review efforts. The City's code enforcement efforts should be continued and strengthened to ensure that Downtown buildings and sites are properly maintained.

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 Brookfield. 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 16 on page 25.

A proactive business retention, expansion and recruitment campaign, should be driven developed by the BMC and BAGP, but include 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 Brookfield. 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.

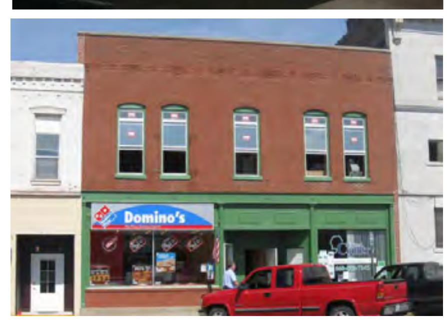
When making adjustments to the Downtown retail mix, service and entertainment businesses should be considered. Retail includes shopping and dining attractions. A wide range of shopping should be developed; for example, stores providing products that range from upscale clothing to kitchen gadgets. A wide 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 Brookfield become a shopping and entertainment destination.

Promote Use of Upper Floor Space

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

Enhancing the Purchasing Experience

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



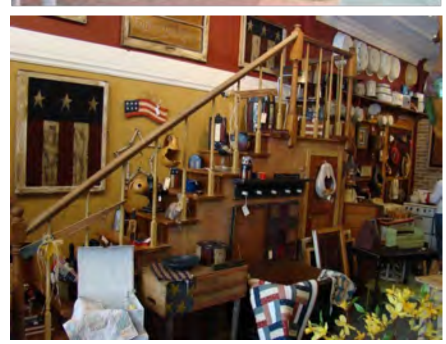
To effectively compete with local strip commercial centers and big box retailers, Downtown Brookfield must continue to convey an image and comfort level that welcomes shoppers, diners and casual visitors as well as creating a unique shopping experience. Some ways that unique local shops can capitalize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

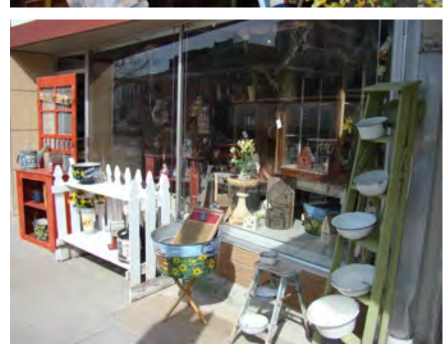
- Extend store business hours.
- Carry the unique or higher-end items that can't be found elsewhere.
- Attract dissatisfied customers from the larger retailers.
- Offer expert, personalized assistance and extraordinary customer service.
- Consider shopping amenities like gift wrapping, free shipping,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

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 Brookfield, 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.

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 Brookfield, 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. Ideally, 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.

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.

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IMPLEMENTATION

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

- Implementation of other key DREAM recommendations, such as those found in the Organizational Structure Review, Building Design Concepts, and Financial Assistance Review are critical for Downtown to fully capitalize on the surrounding retail market reviewed in this analysis.

- The BMC should collaborate with BAGP and the Chamber to develop activities that will focus on providing support to existing Downtown retailers, including:

  —Provide a focus on business retention by working to understand operational challenges, impending lease renewals or vacancies, appetite for expansion or relocation within or outside the community. The spate of relatively recent vacancies on Main Street make this recommendation particularly relevant.

  —Develop support activities for business retention. For example, impending lease renewals should be followed up with a conversation as to the tenants future plans. In the case of impending vacancies, efforts should be put in place to market the space and plan to mitigate the vacancy through the use of 'pop-up stores' or other means as described in the Marketing Toolkit.

- The BMC, in cooperation with the City, BAGP, Chamber, and Heritage Alliance, should work on increasing Brookfield's visibility on the Highway 36 "Way of American Genius." Aspects of this goal include:

  —Upgrading the quality and quantity of content covering Downtown Brookfield that is available on the Heritage Alliance website.

  —Develop reciprocal marketing arrangements with other Highway 36 communities. Additionally, Downtown Brookfield stakeholders should work to increase the value, appeal, visibility, and number of its community events beginning with the Balloon Derby, hunting season, the Bell Game and expanding into newer events especially during the high travel and festival months: May through October.

- The City should consider methods to move non-retail office uses to upper-floors and side streets. Through zoning and other codes, the City can preserve prime ground-floor spaces for retail and restaurant uses.

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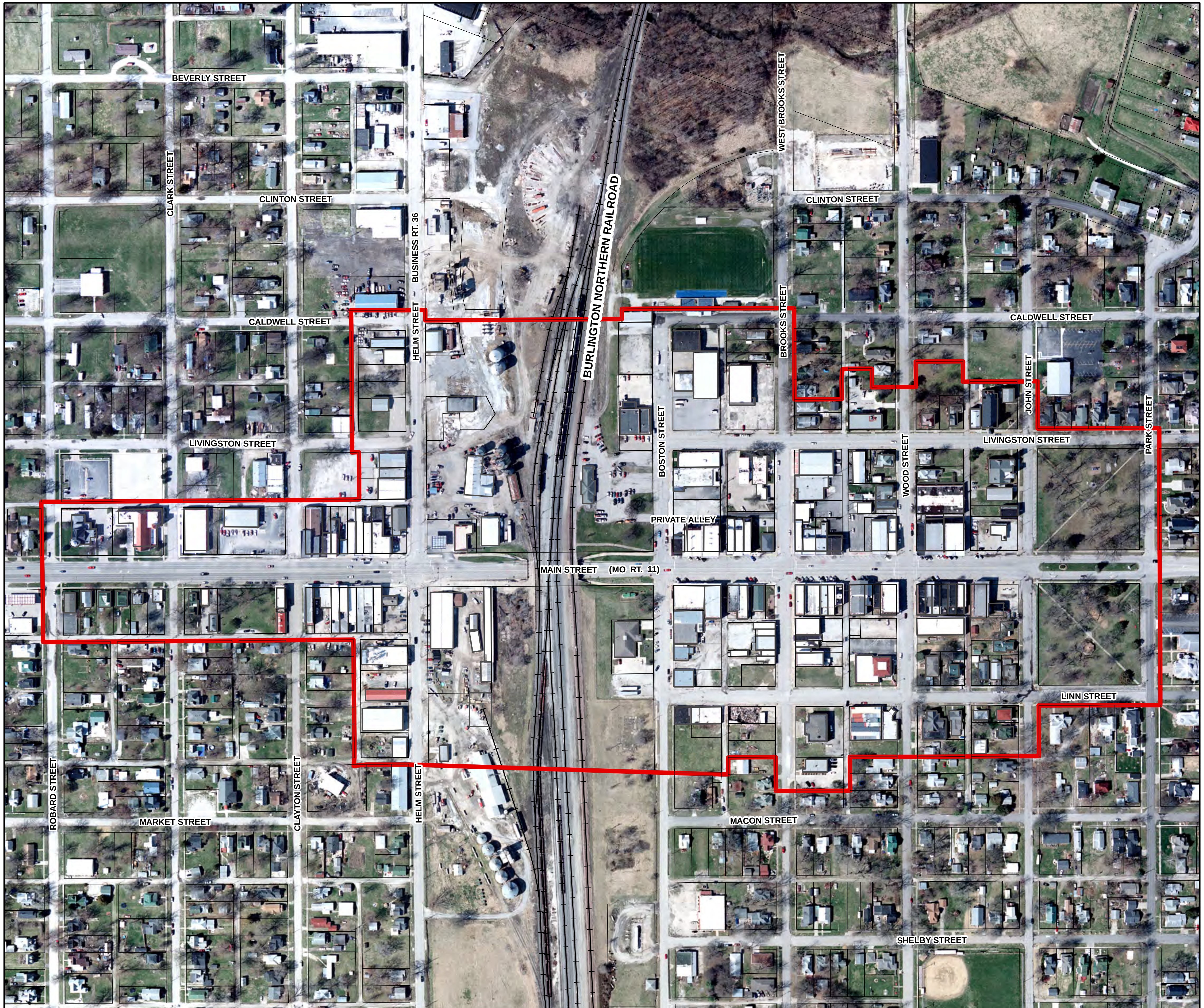
APPENDIX

Appendix A-1
Downtown Brookfield

Retail Market Analysis
City of Brookfield, Missouri



Legend

DREAM Boundary

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Feet

May 2013

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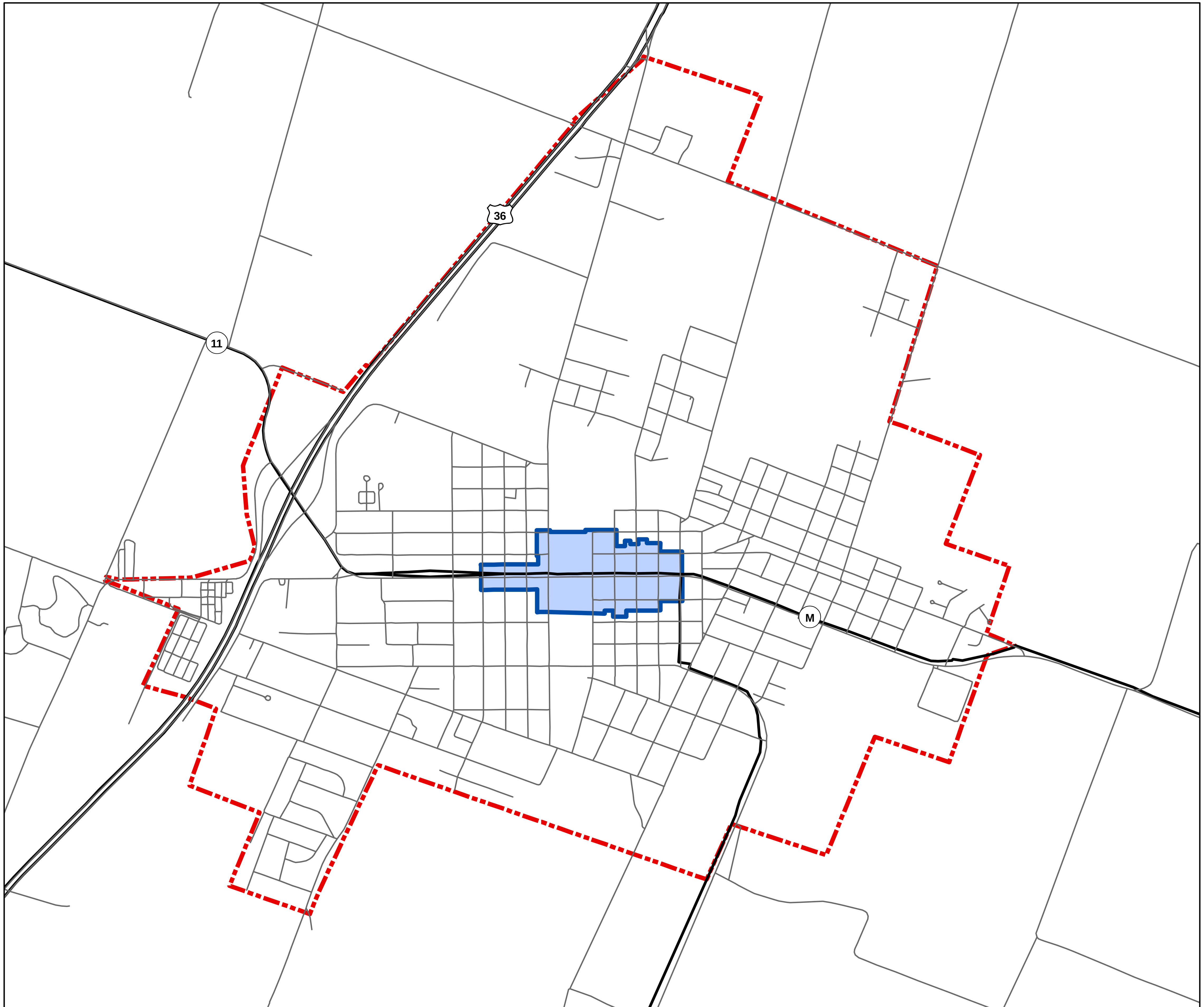
Appendix A-2
Primary Trade Area

Retail Market Analysis
City of Brookfield, Missouri



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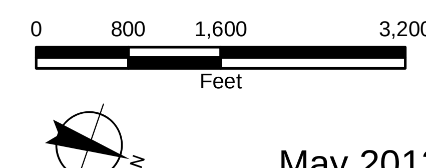
DREAM Boundary

Primary Trade Area



May 2013

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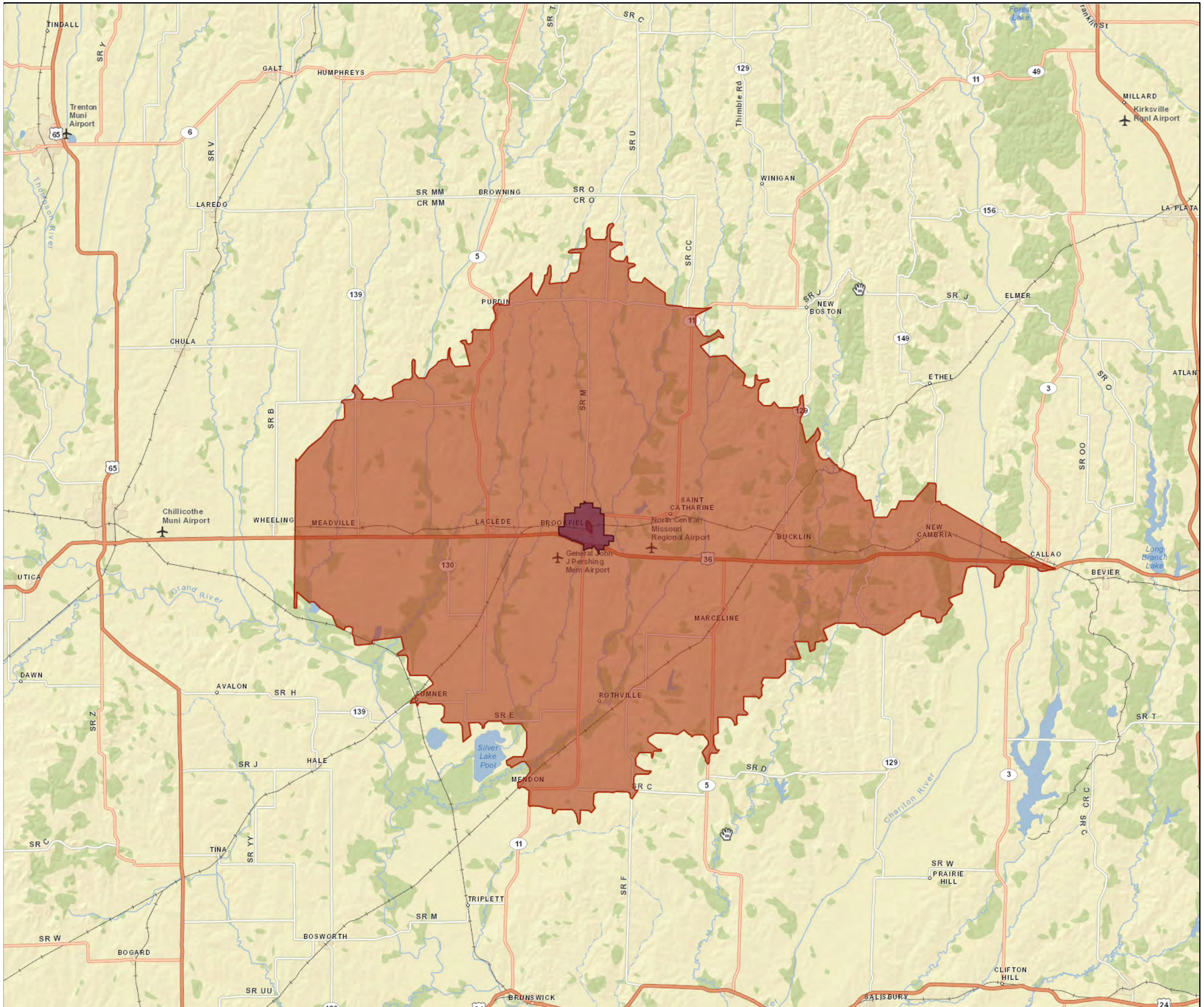
Appendix A-3
Secondary Trade Area

Retail Market Analysis
City of Brookfield, Missouri



Legend

Secondary Trade Area

May 2013

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Appendix B

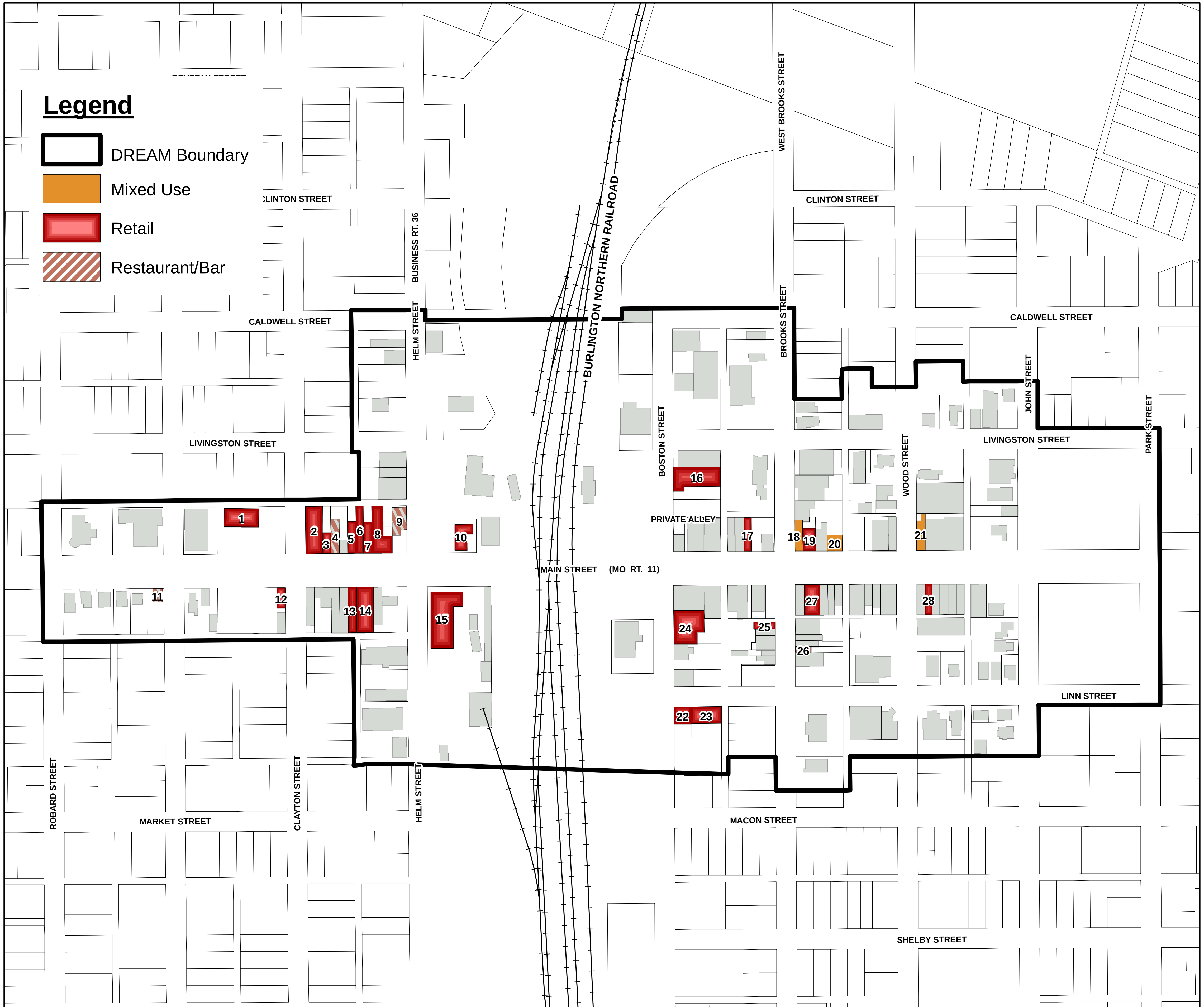
Downtown Brookfield DREAM Study Area
Retail Demand & Sales

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]	**$53,445,013**	**94**	**$48,426,733**	**$ 5,018,280**	**99,225**	**3,722**	**$17,690,822**	**44**	**$17,083,382**	**$4,825,394**	**20**	**1,297**	**10.46**
Total Retail Trade (NAICS 44-45)	**$42,072,577**	**64**	**$38,198,688**	**$ 3,873,889**	**95,911**	**2,930**	**$13,782,834**	**29**	**$10,002,573**	**$2,703,005**	**15**	**923**	**7.44**
Total Food & Drink (NAICS 722)	**$11,372,436**	**31**	**$10,228,045**	**$ 1,144,391**	**3,313**	**792**	**$3,907,988**	**15**	**$7,080,809**	**$2,122,389**	**4**	**2,680**	**21.61**
Furniture & Home Furnishings Stores (NAICS 442)	$916,609	2	$447,658	$ 468,951	11,610	64	$248,369	2	$387,559	$141,306	1	2,214	17.85
Furniture Stores (NAICS 4421)	$624,229	1	$303,165	$ 321,064	7,949	43	$187,285	1	$243,066	$25,145	0	578	4.67
Home Furnishings Stores (NAICS 4422)	$292,380	1	$144,493	$ 147,887	3,661	20	$61,084	1	$144,493	$116,161	1	5,706	46.01
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$1,409,536	3	$387,967	$ 1,021,569	25,292	98	$409,826	2	$305,390	$245,510	2	2,501	20.17
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$3,380,569	18	$2,690,380	$ 690,189	17,088	235	$1,071,826	9	$1,488,501	$365,885	4	1,554	12.53
Building Material and Supplies Dealers (NAICS 4441)	$2,879,465	14	$1,962,404	$ 917,061	22,705	201	$926,045	8	$1,236,673	$339,834	4	1,695	13.67
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$501,104	4	$727,976	$ (226,872)	(5,617)	35	$145,781	1	$251,828	$26,051	0	747	6.02
Food & Beverage Stores (NAICS 445)	$11,915,414	7	$7,094,910	$ 4,820,504	119,348	830	$3,618,293	4	$4,866,329	$1,413,238	1	1,703	13.74
Grocery Stores (NAICS 4451)	$11,253,113	7	$7,094,910	$ 4,158,203	102,950	784	$3,422,417	4	$4,866,329	$1,413,238	1	1,804	14.54
Specialty Food Stores (NAICS 4452)	$530,738	0	$0	$ 530,738	13,140	37	$186,747	0	$0	$0	0	0	0.00
Beer, Wine, and Liquor Stores (NAICS 4453)	$131,562	0	$0	$ 131,562	3,257	9	$9,129	0	$0	$0	0	0	0.00
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$1,640,125	1	$837,462	$ 802,663	19,873	114	$560,941	1	$837,462	$673,254	1	5,895	47.54
Clothing and Clothing Accessories Stores (NAICS 448)	$704,939	4	$382,408	$ 322,531	7,985	49	$198,870	3	$271,742	$218,459	2	4,450	35.89
Clothing Stores (NAICS 4481)	$352,817	2	$161,076	$ 191,741	4,747	25	$88,760	2	$161,076	$129,493	2	5,271	42.51
Shoe Stores (NAICS 4482)	$44,674	0	$0	$ 44,674	1,106	3	$4,454	0	$0	$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$307,448	2	$221,332	$ 86,116	2,132	21	$105,656	1	$110,666	$88,967	1	4,156	33.51
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$485,689	6	$430,796	$ 54,893	1,359	34	$145,669	2	$110,251	$72,704	1	2,150	17.34
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$238,172	4	$117,133	$ 121,039	2,997	17	$54,274	1	$22,741	$2,353	0	142	1.14
Book, Periodical, and Music Stores (NAICS 4512)	$247,517	2	$313,664	$ (66,147)	(1,638)	17	$91,395	1	$87,510	$70,351	1	4,082	32.92
General Merchandise Stores (NAICS 452)	$19,924,390	4	$24,359,388	$ (4,434,998)	(109,803)	1,387	$7,001,237	1	$1,303,602	$0	0	0	0.00
Department Stores Excluding Leased Depts. (NAICS 4521)	$13,358,284	1	$17,691,599	$ (4,333,315)	(107,286)	930	$4,860,262	0	$0	$0	0	0	0.00
Other General Merchandise Stores (NAICS 4529)	$6,566,106	3	$6,667,789	$ (101,683)	(2,518)	457	$2,140,975	1	$1,303,602	$0	0	0	0.00
Miscellaneous Store Retailers (NAICS 453)	$1,695,306	18	$1,567,718	$ 127,588	3,159	118	$527,803	5	$431,737	$245,903	4	2,083	16.80
Florists (NAICS 4531)	$302,698	6	$403,034	$ (100,336)	(2,484)	21	$96,393	2	$212,712	$126,003	2	5,978	48.21
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$666,430	5	$711,150	$ (44,720)	(1,107)	46	$221,091	1	$54,704	$43,978	1	948	7.64
Used Merchandise Stores (NAICS 4533)	$187,797	4	$126,845	$ 60,952	1,509	13	$64,333	0	$0	$0	0	0	0.00
Other Miscellaneous Store Retailers (NAICS 4539)	$538,380	3	$326,690	$ 211,690	5,241	37	$145,986	2	$164,321	$75,923	1	2,025	16.33
Food Services & Drinking Places (NAICS 722)	$11,372,436	31	$10,228,045	$ 1,144,391	3,313	792	$3,907,988	15	$7,080,809	$2,122,389	4	2,680	21.61
Full-Service Restaurants (NAICS 7221)	$5,510,541	21	$4,555,976	$ 954,565	2,764	384	$1,786,549	11	$2,869,437	$495,692	2	1,292	10.42
Limited-Service Eating Places (NAICS 7222)	$5,277,497	5	$5,235,077	$ 42,420	123	367	$1,972,585	3	$4,066,926	$1,510,574	1	4,111	33.15
Special Food Services (NAICS 7223)	$132,698	0	$0	$ 132,698	384	9	$1,857	0	$0	$0	0	0	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	$451,700	5	$436,992	$ 14,708	43	31	$146,997	1	$144,446	$116,123	1	3,692	29.77

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

Appendix C
Retail Locations

Retail Market Analysis
City of Brookfield, Missouri



ID	Retail Location
1	O'Reilly Auto Parts
2	Linn County Machine & Supply
3	Cabin Creek Candles and Rustic Décor
4	Top Hat Saloon
5-6	Hometown Hardware
7-8	The Time Warp
9	Helm Street Inn
10	7th Heaven
11	Tastee Treat
12	A Step Back In Time
13	Keep it Simple
14	Beigel's
15	Quinn Lumber
16	Brookfield Bowl
17	Wild Rose
18	Hearing Aids/Chariton Valley Wireless
19	NCM Graphics
20	Elliot Music
21	The Berry Patch
22-23	Willow Creek Rustic Furniture
24	Sears
25	Kelley's Printing & Petals
26	Pigskin BBQ & Pub
27	Green Hills Rx Health Mart
28	Tooey's Clothing

0 150 300 600
Feet

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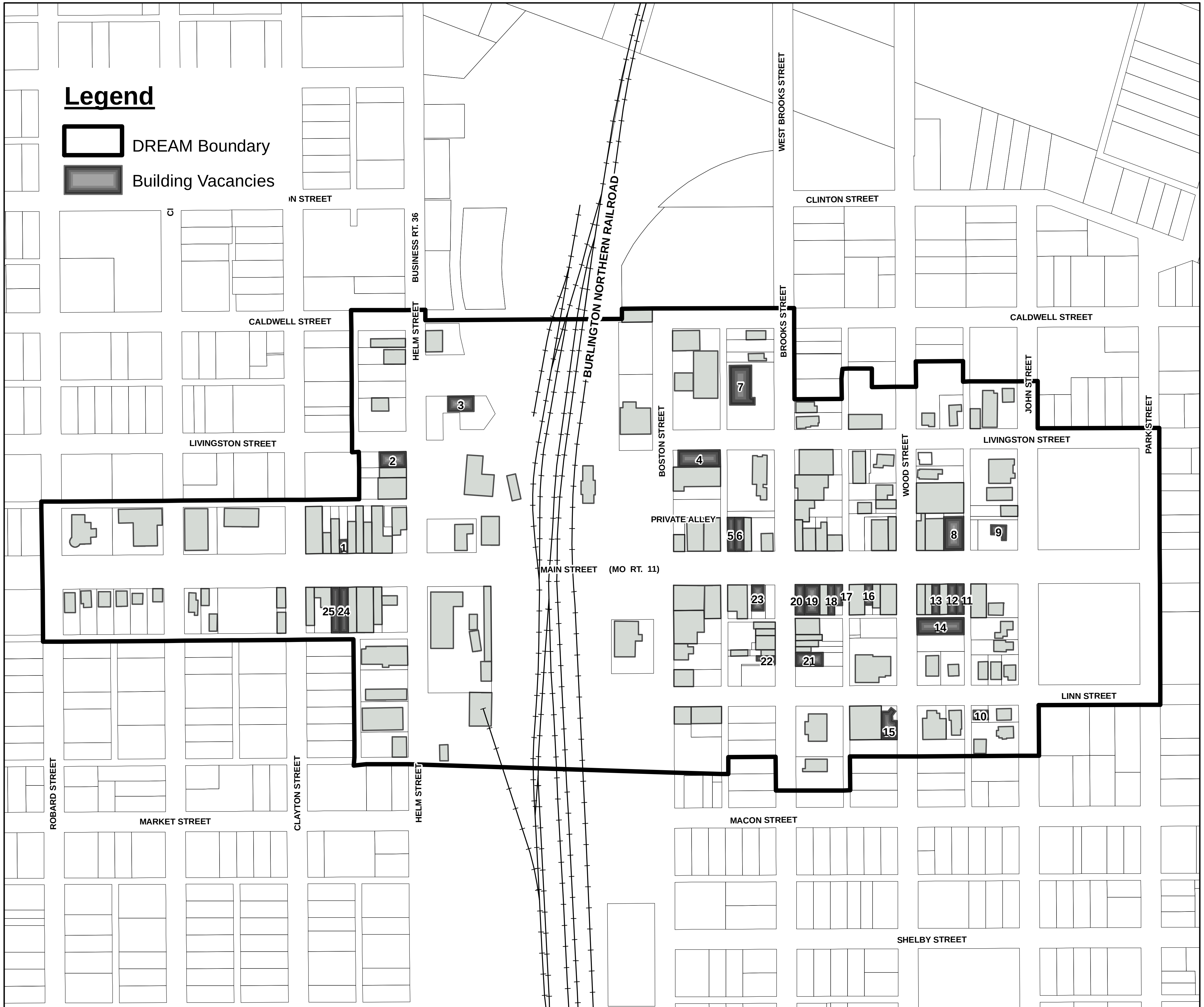
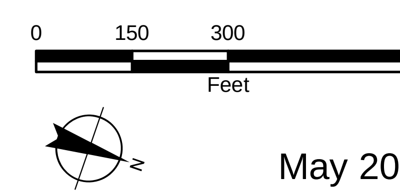
Appendix D
1st Floor Vacancies

Retail Market Analysis
City of Brookfield, Missouri



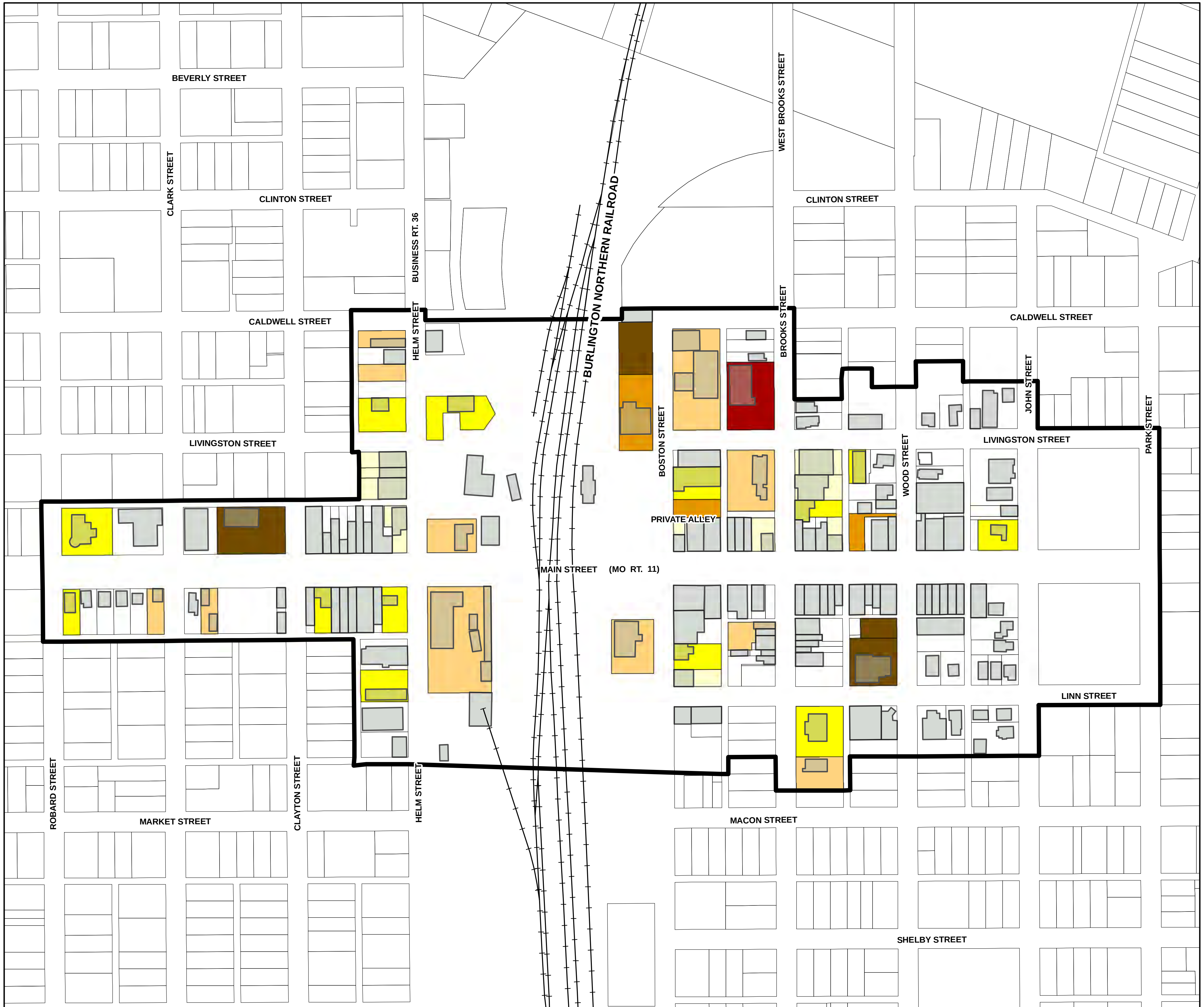
ID	Address	Available Sq.Ft.
1	116 S. Main St.	800
2	121 W. Helm St.	3,000
3	214 W. Helm St.	2,900
4	126 W. Boston St.	5,000
5	113 N. Main St.	1,750
6	115 N. Main St.	2,100
7	101 Livingston Street	6,350
8	309 N. Main Street	3,500
9	323 N. Main Street	1,300
10	314 Linn St.	1,000
11	312 N. Main St.	1,650
12	310 N. Main St.	1,800
13	306 N. Main St.	1,650
14	101 E. Wood St.	5,600
15	218 Linn St.	3,000
16	218 N. Main St.	1,100
17	214 N. Main St.	1,200
18	212 N. Main St.	1,400
19	206 N. Main St.	3,300
20	202 N. Main St.	1,900
21	121 E. Brook St.	1,300
22	120 E. Brook St.	950
23	122 N. Main St.	2,300
24	115 S. Main St.	2,700
25	117 S. Main St.	2,700



May 2013

Appendix E
Off Street Parking

Retail Market Analysis
City of Brookfield, Missouri



Legend

- DREAM Boundary
- 1-5 Spaces
- 6-10 Spaces
- 11-20 Spaces
- 21-30 Spaces
- 31-40 Spaces
- 41-50 Spaces

0 150 300 600
Feet

May 2013

D·R·E·A·M INITIATIVE

PGAV PLANNERS

Existing Store Checklist

Exterior

Storefront:

- Check overall condition. Are repairs needed?

☐ **Yes**

☐ **No**

☐ **Renovation/ Remodel Preferred**

Description

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- Is new paint needed?

☐ **Yes**

☐ **No**

- Does the paint match the store brand and 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**

Description

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D·R·E·A·M INITIATIVE

Existing Store Checklist

Storefront:

- Are there hazards in front of the storefront?

☐ Yes

☐ No

Description

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- Is the sidewalk clean and level?

☐ Yes

☐ No

Description

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Exterior Signage:

- Does signage occur at eye level (for the Pedestrian)?

☐ Yes

☐ No

Description

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- Does signage occur at car level (for the Driver)?

☐ Yes

☐ No

Description

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D·R·E·A·M
INITIATIVE

Existing Store Checklist

Exterior Signage:

- Do wall signs obstruct the architecture?

☐ Yes
☐ No

Description

- Is the signage maintained in good condition?

☐ Yes
☐ No

Description

- Does the signage complement the building and area?

☐ Yes
☐ No

Description

- Are the exterior signs lighted (at night)?

☐ Yes
☐ No

Description

D·R·E·A·M INITIATIVE

Existing Store Checklist

Display Windows:

- What is the condition of the 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**

- Do displays include the best or most popular products?

☐ **Yes**

☐ **No**

Display Description

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- If it is 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**

D·R·E·A·M INITIATIVE

Existing Store Checklist

Interior

Flooring:

- Is the floor worn, hazardous, or 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**

Flooring Description

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Ceiling:

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

☐ **Yes**
☐ **No**

Description

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- Are the HVAC vents clean?

☐ **Yes**
☐ **No**

Existing Store Checklist

Ceiling:

- Are there any distracting issues?

☐ Yes

☐ No

Description

Lighting:

- Is the lighting adequate to show the merchandise?

☐ Yes

☐ No

- Is the bulb type appropriate (fluorescent/incandescent)?

☐ Yes

☐ No

- Are the bulbs the same type?

☐ Yes

☐ No

- Does the lighting design match the rest of the interior style?

☐ Yes

☐ No

Lighting Description

- Are there adjustable lights to create focal points?

☐ Yes

☐ No

Description

D·R·E·A·M
INITIATIVE

Existing Store Checklist

Interior Colors:

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

☐ **Yes**

☐ **No**

Description

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- Are the paint and finish colors consistent with the store brand and 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 customers?
  - ☐ **Yes**
  - ☐ **No**
- Are there slow pockets of merchandise that receive little attention?
  - ☐ **Yes**
  - ☐ **No**

Customer Flow Description

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Cash Wrap/Register:

- Is the cash wrap area in good condition?
  - ☐ **Yes**
  - ☐ **No**
- If there is 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 of purchasing?
  - ☐ **Yes**
  - ☐ **No**
- Is the counter top clutter-free?
  - ☐ **Yes**
  - ☐ **No**
- Is the location appropriate? (It should not occupy prime real estate)
  - ☐ **Yes**
  - ☐ **No**

D·R·E·A·M

Existing Store Checklist

Cash Wrap/Register:

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

  ☐ Yes

  ☐ No

- Is there a fixture nearby for impulse purchases?

  ☐ Yes

  ☐ No

  Description

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Fixtures & Equipment:

- Does the fixture style match the store 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 displays grouped 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 brand and product style?

  ☐ **Yes**

  ☐ **No**

  Description

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Cleanliness:

- Is the store clean and free of dust?

  ☐ **Yes**

  ☐ **No**

  Description

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- Are boxes cleared and out of sight?

  ☐ **Yes**

  ☐ **No**

- Are the views into off-limit areas blocked?

  ☐ **Yes**

  ☐ **No**

Existing Store Checklist

Cleanliness:

- Are product signs and price-tags professional, consistent in type, and not hand-made?

☐ Yes

☐ No

Description

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Comfort:

- Is the shop a comfortable temperature?

☐ Yes

☐ No

- Are entry doors easy to open and close?

☐ Yes

☐ No

- Are 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

D·R·E·A·M

INITIATIVE

Existing Store Checklist

Dressing Rooms:

- Are the dressing rooms clean?
  - ☐ Yes
  - ☐ No
- 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: