Webb City, Missouri

DOWNTOWN
REVITALIZATION &
ECONOMIC
ASSISTANCE FOR
MISSOURI

RETAIL MARKET ANALYSIS

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

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PGAV PLANNERS

ACKNOWLEDGMENTS

Webb City

We Love It Here!

Downtown Revitalization and Economic Assistance for Missouri (DREAM) Program Sponsors:

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Downtown Revitalization and Economic Assistance for Missouri
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Executive Summary

Webb City is located in southwest Missouri in Jasper County. The City is about six miles to the northeast of Joplin, Missouri and five miles east of the Kansas State Line. Webb City is part of the Joplin, Missouri Metropolitan Statistical Area. The state highways of Business 71 and 171 intersect in town and Webb City is just northwest of State Highway 249. Main Street is also State Highway D and intersects in Downtown with Broadway or Highway HH. Interstate 44 is about seven miles to the south.

Webb City was platted by John C. Webb in 1875 and incorporated in 1876 with a population of 700. Webb had discovered lead on his property in 1873 and by 1876 had leased the land to Center Creek Mining Company. By the 1890's, over 700 lead and zinc mines were located within Webb City and nearby Carterville. The St. Louis and San Francisco Railroad was built in 1879 and the Missouri Pacific line built in 1881. By 1900 the population had grown to 9,200 and remained a mining hub through World War I. As mining started to decline, Webb City turned to industrial and agricultural production in an attempt to diversify its economy. In the 1930's and during World War II, the area manufactured explosives. As of the 2010 Census, Webb City has grown to about 11,000 people living in about 4,200 households.

Downtown was, and is, integral to Webb City's growth and serves as a commercial and civic hub. Similar to many towns, Downtown provides the local community with a place to go for trade, religious services, education, and socializing. The City has recently obtained listing on the National Register of Historic Places for Downtown and has a number of properties that are examples of Webb City's historic prosperity and existing architectural assets. Some building alterations have compromised the architectural integrity of the historic area by application of inappropriate materials, window coverings, and awnings. Interspersed among the historic properties, are several buildings that had been developed to serve the motoring visitors along Route 66. These properties have a unique style that does not necessarily detract from the overall historic fabric of Downtown.

This Retail Market Analysis reveals that Downtown could see an increase in sales if Downtown businesses can absorb some unmet retail demand. These projections are based on existing sales volumes, vacant floor space, and estimated leakage of retail dollars being spent outside of Downtown and the city limits. Downtown Webb City competes for retail business with the Internet, other commercial areas within Webb City, and Joplin, Missouri.

This Retail Market Analysis was conducted by analyzing data for three areas: Downtown Webb City (Downtown) which is the DREAM study area; the Primary Trade Area (PTA) which is the city limits; and the Secondary Trade Area (STA) which is a custom-defined area that represents an acceptable catch-basin of consumers likely to choose Downtown over another community for a shopping trip. The existing retail market, demographics, and DREAM Community Surveys were also analyzed to help define a strategy that takes into account public preferences for Downtown.

A review of market conditions provides an idea of the possible new and existing business potential for Downtown Webb City. The DREAM Land Use and Building Infrastructure Survey revealed about 220,914 square feet of existing first-floor commercial space. **It is significant to note that about 87% of the total available space in Downtown Webb City is a non-retail/non-restaurant use.** The City should monitor incoming Downtown uses and consider adjusting its zoning code to reduce this imbalance between retail and non-retail uses. Overall, significant non-residential uses in Downtown Webb City include:

- 10,423 square feet of restaurant space (4,600 square feet vacant)
- 66,134 square feet of retail space (31,750 square feet vacant)
- 136,122 square feet of office/service space (15,350 square feet vacant)
- 8,235 square feet of mixed-use space (1,050 square feet vacant)

The retail/restaurant space in Downtown is generating only $928,000 in annual sales (sales do not include auto dealers and related items, grocery stores, gasoline stations, or non-store retailers). The retail component (removing any square footage for auto dealers and related items, grocery stores, gasoline stations, or non-store retailers) is generating $608,000 or about $17.69 per occupied square foot. The restaurant component is generating about $319,000 or about $54.86 per occupied square foot. While the retail sales per-square-foot average is very low, the restaurant sales average is within the ranges found in Missouri DREAM communities. For retail locations, a more likely, but still conservative sales estimate of $50 per square foot can be used. Using $50 per square foot as an average, the 52,750 square feet of space that can be easily used by a retail or restaurant use represents about $2.6 million in potential additional sales to the City.

Opportunities for retail development in Downtown Webb City include focusing on attracting new users of vacant spaces, identifying a brand to attract more regional consumers and visitors, and developing higher-quality products to increase the sales per square foot in Downtown.

The retail analysis demonstrates that several retail sectors are not adequately served locally within the STA. A significant amount of unmet retail demand indicates that shoppers are leaving the Downtown and PTA to meet their retail needs beyond Webb City, primarily in Joplin, Missouri, as well as on the Internet. Unmet retail demand presents an opportunity for Downtown Webb City to capture more retail dollars by becoming a niche market that can attract some of the existing visitors of the other attractions in the region.

Table 16 on Page 27 lists the retail areas for potential growth in Downtown Webb City. The retail goods and services are classified according to the North American Industry Classification System (NAICS) in industry groups. Automobile-related retail and big-box stores in the categories of grocery and department stores are not considered because these uses typically do not locate in a downtown environment due to market forces. The unmet demand in the category of Department Stores is worth noting as existing Downtown Webb City merchants may wish to add general department store goods to their product lines.

Significant opportunities for Downtown to meet unmet demand are shown in dollars of additional sales for the City and include:

- Electronics & Appliance Stores: $5.5 million
- Full-Service Restaurants: $4.0 million
- Building Material and Supplies Dealers: $3.1 million
- Sporting Goods/Hobby/Musical Instrument Stores: $2.9 million
- Home Furnishings Stores: $2.0 million
- Jewelry, Luggage, and Leather Goods Stores: $1.9 million
- Shoe Stores: $1.9 million
- Office Supplies, Stationary, and Gift Stores: $1.8 million
- Drinking Places - Alcoholic Beverages: $1.6 million

The total demonstrated unmet demand for retail goods and services, removing Department Stores, shows that over $26 million dollars in additional sales for Downtown Webb City could be generated if vacant space was available. However, this amount of demand would require nearly 525,000 square feet of space based upon the average of $50 per square foot. This is not a likely scenario, but these figures indicate that Downtown should be able to satisfy more retail demand.

Although relocation of office and service businesses to upper-floors and side streets could be pursued, the City should primarily focus on strategies to strengthen existing businesses and attract new businesses to fill existing vacancies.

Recommendations for improving the draw of Downtown Webb City are intertwined with the overall brand of the City and Route 66. The City needs to differentiate itself within the Joplin market by identifying, reinforcing, and promoting a niche market that will attract visitors. Additionally, wayfinding signage, primarily along State Highway 249 will assist visitors to the City, as well as to Downtown attractions.

The Appendix of this report includes maps of the trade areas studied (Appendix A), a detailed table showing unmet retail demand in various retail categories (Appendix B), information on existing retail and multi-story building locations (Appendix C), a map of buildings with 1st floor vacancies (Appendix D), a map showing adequate off street parking locations (Appendix E), and information regarding effective techniques for retail stores (Appendix F). These tools may be invaluable to Downtown Webb City businesses as they seek to improve their sales.

INTRODUCTION

Downtown Webb City, Missouri has a typical grid street layout with a commercial core that stretches along Main Street/Highway D, the primary north/south corridor, from Highway 71 north. Broadway Street/Highway HH provides the primary east/west traffic artery and is the north/south dividing street. Webb City is not the County Seat of Jasper County, so there is no typical courthouse square setting. Downtown is linear with the commercial core of businesses being dispersed along Main Street and with no main orientation or meeting point. The DREAM Study Area also includes the 144-acre King Jack Park located south of Highway 71 at South Main Street. The City has constructed a historically sensitive streetscape project along Main Street, primarily from 1st Street to Austin Street. This streetscape is very positive and includes lighting, pavers, trash receptacles, decorative street signs, street trees, and banners.

In 1926, U.S. Route 66 was established from Chicago, Illinois to Santa Monica, California. This famous highway was located along what is now Interstate 44 and helped give rise to the nomadic automobile subculture. Communities near Route 66, such as Webb City, developed an early automobile-centric architecture and other visitor-oriented amenities that were loosely regulated and often oversized, flashy, or otherwise unique. The "Mother Road" as described by John Steinbeck, encapsulated a feeling of freedom to travel or wanderlust. Many also dubbed it "The Main Street of American" because it connected a great number of people throughout the country. The Highway's influence came to mean a uniqueness of commercial building architecture, but also a uniqueness in terms of land-use and signage. Architecture styles attributed to the era include Art Deco, Modern, Roadside, Novelty, and Googie. Land uses were often combined and catered to automobile convenience or parking. Signage was designed for maximum attention or repetition.

City Hall is located at 200 S. Main Street, the Webb City Police Department at 211 W. Broadway Street, and the Chamber/Rt. 66 Center at 112 W. Broadway Street; all within the DREAM Study Area boundary. Other activity centers around Webb City and in the region include the Webb City public library, U.S. Post Office, public schools, the Webb City branch of Crowder Community College, and various parks (Aylor, Hall Street, Hatten, King Jack, Memorial, and Sunset Creek).

Modern development trends have often diminished the function of the typical American downtown. As consumers favored the use of the automobile, commercial development sought larger parcels of affordable undeveloped land usually located outside of the city's commercial core. The automobile increased the mobility of the consumer, and shopping centers increasingly located in developments along major roadways. As noted, Route 66 traveled through Downtown Webb City along Broadway Street. The phenomenon of Route 66 left Downtown Webb City with many important civic and social functions, architecture, and history. Route 66 has also made Downtown Webb City a destination for visitors. However, Downtown must appeal to businesses and attract an expanded retail market to compete with larger retail centers in the region.

BACKGROUND & METHODOLOGY

This report quantifies the retail demand and supply for the trade areas to identify potential retail services that might be successful in Downtown. Recommendations have been developed regarding strategies to encourage potentially successful retail development in Downtown Webb City. The report uses concepts common in other DREAM Initiative analyses and 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) retail development recommendations and strategies.

During the DREAM Community Survey tasks, information was gathered from City residents, Officials, Chamber members, businesses and other stakeholders. These market segments each provide insights into potential improvements to Downtown Webb City. Additionally, a review of future residential demand for the area has been conducted by the Missouri Housing Development Commission in 2015. A physical examination of the City provides insight into traffic and pedestrian trends and helps to identify Downtown business mix and occupancy patterns. The retail demand, or spending power of the trade area, is compared to the retail supply, or retail sales of the area, to quantify potential unmet demand in Downtown. Retail categories with unmet demand are compared with community input and other economic and physical conditions in order to develop retail strategies for Downtown.

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 2019. The analysis is meant to provide general strategic direction for developing retail in Downtown Webb City. This study is not intended to be the sole basis for development decisions.

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TRADE AREA PROFILE

The "trade area" refers to the geographic area from which a majority of customers for a given business originate. Different retail business categories can have different trade areas. The trade area for a convenience store or hair salon might be quite small, whereas the retail trade area for a car dealership or specialty electronics retailer would be much larger. To determine the trade area of a shopping center or an entire retail district, an average of the individual business trade areas must be used to balance the variations. The concept of trade areas is an important part of evaluating the performance of a retail district and determining the potential of expanding retail activity within a geographic area.

TRADE AREA DEFINITIONS

The retail market analysis evaluates three different geographic trade areas, summarized below: a downtown trade area (Downtown), a Primary Trade Area (PTA) and a Secondary Trade Area (STA). The Downtown Trade Area is the defined DREAM Study Area in Downtown Webb City, the PTA is the City corporate limit, and the STA is a custom-defined area that represents an acceptable catch-basin of consumers likely to choose Downtown over another community for a shopping trip. A map of each area is included in Appendix A and the areas are summarized below.

- Downtown Webb City (Downtown): The focus of this analysis is to determine the current retail activity captured by Downtown Webb City and the amount of additional retail activity that might be supported. Downtown is defined as the DREAM Study Boundary.

- Primary Trade Area (PTA): The boundary of Webb City is defined as the PTA. It is from this area that Downtown draws the majority of its shoppers. It is also useful to show the relationship between Downtown and citywide retail activity.

- Secondary Trade Area (STA): For the STA, the study considers the drive-time from the surrounding area to Downtown, but is heavily adjusted to reflect the proximity of Webb City to the retail markets in the surrounding larger communities, including Joplin. The resulting STA is primarily to the north of Webb City and represents an area from which most consumers are likely to travel to the PTA, or through it, to shop for products. Retail recommendations will focus on how Downtown can capture more of these consumers.

The Trade Areas generally ignore municipal, county, and state boundaries. The vast majority of consumers will typically shop at the location most convenient, regardless of factors such as jurisdiction and sales tax rate.

TRADE AREA DEMOGRAPHIC SNAPSHOT

In order to understand the trade areas that are the focus of this study it is important to understand their demographic composition. When evaluating the demographics of a particular place, it is helpful to use a baseline with which to compare the data. An appropriate baseline for comparison of DREAM communities is data for the State of Missouri. Using the State of Missouri as a baseline provides an indication of positive or negative performance.

The following table highlights the estimated demographic snapshots for 2014 for Downtown, the PTA, the STA, and the State of Missouri. Some information in this analysis will be compared to information from the 2010 United States Decennial Census. However, Downtown and the STA do not coincide with whole census tracts or Census identified areas. Data for these geographies should not be relied upon as precise figures, but rather as estimates extrapolated from local census tracts and the City of Webb City. For purposes of comparison, the demographic tables in this report use current 2015 estimates and 2020 projections as provided by a third-party demographic data supplier and based on U.S. Census data.

Table 1, below, indicates Downtown has a small population with a lower median household income than the PTA, STA, and the State of Missouri. The average number of person per occupied household ranges from 2.5 to 2.7 in the PTA, STA, and State, but is estimated to drop to 2.0 for Downtown Webb City. The median age in Downtown is significantly younger than the PTA, STA, and the State of Missouri.

TABLE 1: 2015 DEMOGRAPHIC SNAPSHOT

	Downtown Webb City	PTA	STA	State of Missouri
Population	398	12,119	30,249	6,092,320
Median Household Income	$34,249	$35,622	$40,177	$47,398
Housing Units	227	4,995	11,953	2,782,240
Owner Occupied	100	2,742	7,716	1,651,597
Renter Occupied	101	1,936	3,609	777,052
Vacant Units	26	317	628	353,591
Median Age	31.9	33.2	34.4	38.6
19 and Under	117	3,568	8,829	1,544,446
20-44	152	4,330	10,387	1,973,235
45 and Over	129	4,222	11,034	2,574,639

MARKET PROFILE/DEMOGRAPHIC TRENDS

DOWNTOWN WEBB CITY (DOWNTOWN)

Figure 1: Downtown Webb City

Downtown (the area within the DREAM boundary) is roughly 149 acres and consists of about 203 primary buildings on 31 city blocks (see Figure 1), not including King Jack Park.

The 2010 Census showed 374 people lived Downtown in 188 occupied housing units, for an average of about 2 persons per occupied unit. The median age was 31.4, with about 31% of the population being age 19 or younger, 37% between 20 and 44 years of age, and 32% age 45 years or more.

The 2015 estimate for the population and number of housing units in Downtown have both increased slightly. These trends are expected to continue at a slightly increased rate. The median age is expected to increase. The age cohort of 20-44 years of age is estimated to be the slowest growing cohort for Downtown, with the 45 and over age cohort projected to see the greatest increase to 2020.

The table at right illustrates current demographics and future demographic trends for Downtown.

TABLE 2: DOWNTOWN WEBB CITY

	2010	2015	2020	% Change '10-'15	% Change '15-'20
Population	374	398	431	6.4%	8.3%
Housing Units	217	227	244	4.6%	7.5%
Owner Occupied	95	100	107	5.3%	7.0%
Renter Occupied	93	101	110	8.6%	8.9%
Vacant Units	29	26	27	-10.3%	3.8%
Median Age	31.4	31.9	33.1	1.6%	3.8%
19 and Under	116	117	124	0.9%	6.0%
20-44	140	152	158	8.6%	3.9%
45 and Over	118	129	148	9.3%	14.7%

PRIMARY TRADE AREA (PTA)

The 2010 Census showed 10,996 people lived in the PTA (defined as the City limits of Webb City, as depicted in Figure 2) in 4,230 occupied housing units for an average of 2.6 persons per occupied unit. The median age was 32.1 with about 31% of the population age 19 or younger, 36% between 20 and 44 years of age, and 33% age 45 years or more.

Table 3, below, shows that the 2015 population estimate of the PTA has grown moderately and this growth trend is expected to continue. The table also shows growth in the total number of housing units with the number of vacant units declining significantly from 2010 to 2015; likely due to the Joplin tornado in 2011. The median age is expected to increase slightly. The age cohort of 20-44 years of age is estimated to be the slowest growing cohort for the PTA with the 45 and over age cohort projected to see the greatest increase to 2020.

Figure 2: Primary Trade Area

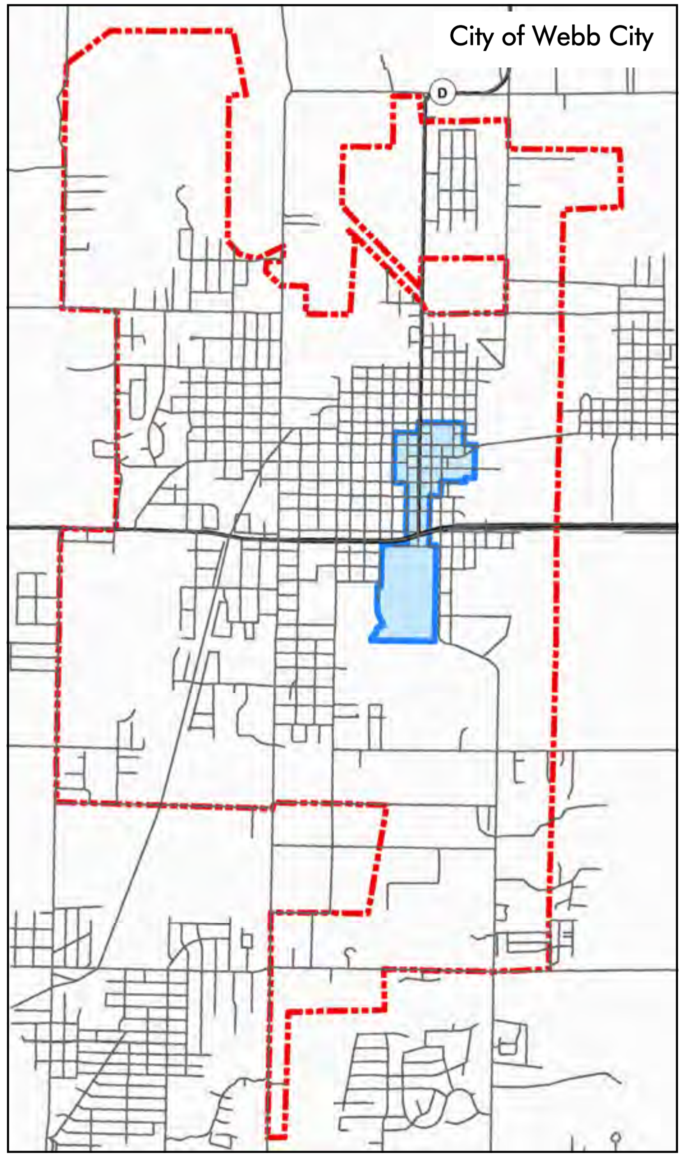

TABLE 3: PRIMARY TRADE AREA

	2010	2015	2020	% Change '10-'15	% Change '15-'20
Population	10,996	12,119	13,325	10.2%	10.0%
Housing Units	4,730	4,995	5,496	5.6%	10.0%
Owner Occupied	2,535	2,742	3,033	8.2%	10.6%
Renter Occupied	1,695	1,936	2,123	14.2%	9.7%
Vacant Units	500	317	340	-36.6%	7.3%
Median Age	32.1	33.2	34.2	3.4%	3.0%
19 and Under	3,426	3,568	3,885	4.1%	8.9%
20-44	3,901	4,330	4,658	11.0%	7.6%
45 and Over	3,669	4,222	4,781	15.1%	13.2%

Secondary Trade Area (STA)

The 2010 Census showed 27,661 people lived in the STA (refer to Figure 3) in 10,311 occupied housing units for an average of about 2.7 people per occupied housing unit. The median age was 33.5 with about 30% of the population age 19 or younger, 34% between 20 and 44 years of age, and 36% age 45 years or more.

Figure 3: Secondary Trade Area

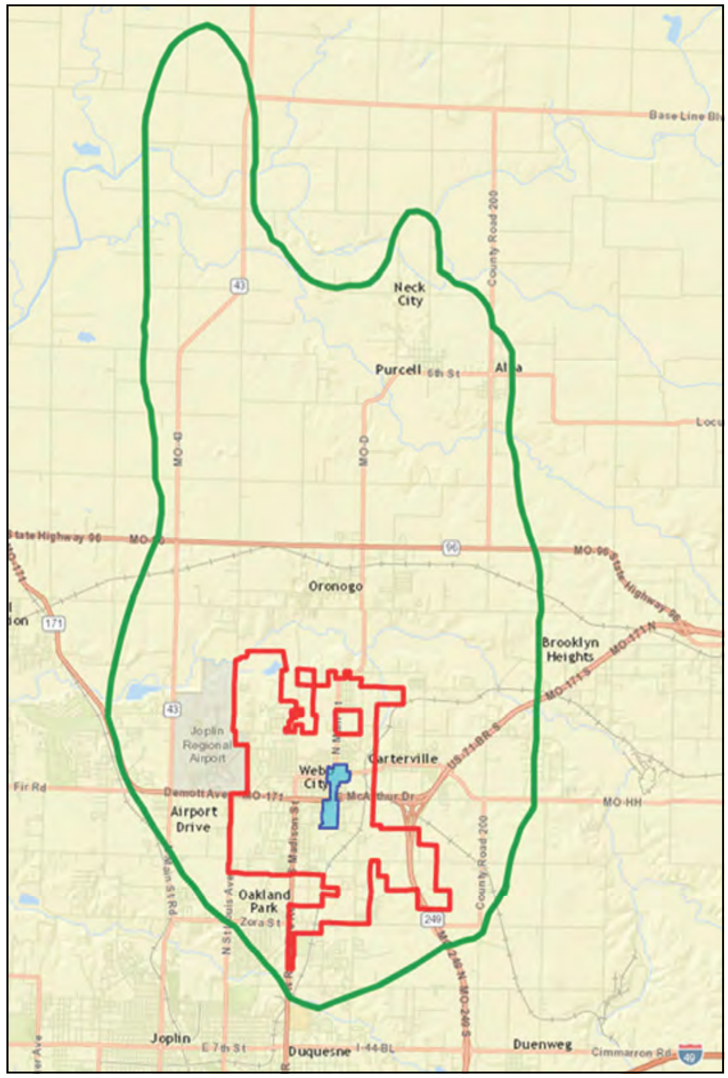

Table 4 shows that the 2015 population estimate of the STA has grown moderately and that this growth trend is expected to continue. The table also shows growth in the total number of housing units with the number of vacant units declining significantly from 2010 to 2015; again likely due to the Joplin tornado in 2011. The median age is expected to increase slightly. Although the youngest age cohort of 19 and under has historically demonstrated the slowest growth, the age cohort of 20-44 years of age is projected to be the slowest growing cohort for the STA moving forward.

The table at right illustrates current demographics and future demographic trends for the STA.

TABLE 4: SECONDARY TRADE AREA

	2010	2015	2020	% Change '10-'15	% Change '15-'20
Population	27,661	30,249	33,065	9.4%	9.3%
Housing Units	11,307	11,953	13,082	5.7%	9.4%
Owner Occupied	7,103	7,716	8,421	8.6%	9.1%
Renter Occupied	3,208	3,609	3,982	12.5%	10.3%
Vacant Units	996	628	679	-36.9%	8.1%
Median Age	33.5	34.4	35.1	2.7%	2.0%
19 and Under	8,400	8,829	9,665	5.1%	9.5%
20-44	9,438	10,387	11,053	10.1%	6.4%
45 and Over	9,822	11,034	12,351	12.3%	11.9%

STATE OF MISSOURI

As shown in the 2010 Census, nearly six million people live in the State of Missouri in approximately 2.4 million occupied housing units for an average of 2.5 people per occupied unit. The median age is nearly 38. About 27% of the population are 19 or younger, 32% are between the ages of 20 and 44, and 41% are age 45 years or more. Table 5, below, provides demographic information and future trends for the State of Missouri.

TABLE 5: STATE OF MISSOURI

	2010	2015	2020	% Change '10-'15	% Change '15-'20
Population	5,988,927	6,092,320	6,221,540	1.7%	2.1%
Housing Units	2,712,729	2,782,240	2,848,089	2.6%	2.4%
Owner Occupied	1,633,610	1,651,597	1,688,070	1.1%	2.2%
Renter Occupied	742,001	777,052	796,537	4.7%	2.5%
Vacant Units	337,118	353,591	363,482	4.9%	2.8%
Median Age	37.8	38.6	39.3	2.1%	1.8%
19 and Under	1,601,411	1,544,446	1,559,206	-3.6%	1.0%
20-44	1,937,372	1,973,235	1,978,777	1.9%	0.3%
45 and Over	2,450,144	2,574,639	2,683,557	5.1%	4.2%

DEMOGRAPHIC COMPARISON

Table 6, below, provides a comparison of demographic data and shows that Downtown population growth has outpaced the State, but has lagged behind the PTA and STA. This trend is expected to continue with the Downtown population change increasing at a rate closer to the PTA and STA. The table also shows that the population in Downtown has been aging the slowest of the PTA, STA, and State. However, the 2020 estimate is that the Downtown population will age slightly faster than the PTA, STA, and State. Overall, these trends indicate a positive population growth rate that has been outpacing the State and should continue to do so.

TABLE 6: DEMOGRAPHIC COMPARISON

	Population % Change		Median Age Change (in years)	
	'10-'15	'15-'20	'10-'15	'15-'20
Downtown	6.4%	8.3%	0.5	1.2
PTA	10.2%	10.0%	1.1	1.0
STA	9.4%	9.3%	0.9	0.7
State	1.7%	2.1%	0.8	0.7

Table 7, below, gives a comparison of age demographic trends in terms of percentage of increase or decrease. The Downtown population is primarily expected to see growth in the youngest and oldest age categories, with the 20-44 age group lagging the PTA and STA. All age cohorts are expected to show growth that outpaces the State. Downtown shows the strongest growth in the 45 & Over category. The PTA shows the strongest growth trend in the 19 & Under Category and the STA shows the strongest growth in the 20-44 category. This situation may be an indicator that Webb City, especially Downtown, is appealing to those residents of the area that are approaching retirement age.

TABLE 7: TRADE AREA AGE COMPARISON

	19 & Under Change		20-44 Change		45 & Over Change	
	'10-'15	'15-'20	'10-'15	'15-'20	'10-'15	'15-'20
Downtown	0.9%	6.0%	8.6%	3.9%	9.3%	14.7%
PTA	4.1%	8.9%	11.0%	7.6%	15.1%	13.2%
STA	5.1%	9.5%	10.1%	6.4%	12.3%	11.9%
State	-3.6%	1.0%	1.9%	0.3%	5.1%	4.2%

Table 8, below, provides a projection of the housing units in the trade areas. The table shows that Downtown is expected to outpace the State and lag behind the PTA and STA in all housing unit categories.

TABLE 8: TRADE AREA HOUSING UNITS COMPARISON

	Housing Units Change	Owner Occupied Change	Renter Occupied Change	Vacant Unit Change
	'15-'20	'15-'20	'15-'20	'15-'20
Downtown	7.5%	7.0%	8.9%	3.8%
PTA	10.0%	10.6%	9.7%	6.8%
STA	9.4%	9.1%	10.3%	7.5%
State	2.4%	2.2%	2.5%	2.7%

HOUSING MARKET ANALYSIS SUMMARY

For Downtown to have a healthy retail district, it is important that there are residents living within walking distance of Downtown businesses. These residents provide a regular customer base for retailers and give Downtown a 24-hour population. This continuous presence provides life on the sidewalks and keeps a watchful eye on Downtown when businesses are closed. The Missouri Housing and Development Commission, through the DREAM process, conducted a Residential Demand Analysis in 2015 that projected residential demand for Webb City, with a focus on Downtown.

The analysis concluded that Webb City would benefit from adding more residential units in and around Downtown and that there may be demand for additional housing units over the next few years. The 55+ age segment is growing in the Webb City area and the residential analysis points to population growth that is outpacing the overall State of Missouri growth rate. Along with other public and private improvements, this population trend provides an opportunity for Downtown to encourage mixed-use development with upper-floor housing.

The benefits of increasing residential units in the core of the City are many and include: using vacant upper-floor space, placing underutilized land and buildings into productive use, increasing consumer activity, bolstering the local tax base, increasing population density in Downtown, and creating ideal conditions for extended business hours and additional businesses.

CONSUMER SEGMENTS

Specific retail strategies will meet the needs of specific consumers. This analysis seeks to identify major consumer segments that are patrons of typical downtown businesses and which consumer segments are likely to patronize Downtown Webb City's businesses in the future. The City can address customer needs and implement plans that increase Downtown's ability to provide needed services to these segments. The broad consumer segments reviewed for Webb City include:

Downtown Employees

- As shown in Table 9 on page 19, Downtown is home to about 814 employees and 73 businesses.
- This segment's impact on the City's retail market can be estimated:
  814 x $10 weekly = about $420,000 annually.
- This segment has a large demand for restaurants and food services, as well as convenience items during work commutes.
- This segment often responds to frequent and repeat business promotions.
- Downtown businesses should seek to develop strategies to keep and serve this market in Downtown without the need to drive to other locations.

Downtown Residents

- In 2015, 398 residents are estimated to be living in 201 occupied households in Downtown Webb City. This is a small market at this time.
- The comprehensive buying demands of this segment can be greatly served with retailer product differentiation and improved store hours.
- This segment often responds to frequent and repeat business promotions.

Webb City Residents

- This is a much larger segment than Downtown Residents, with the PTA population of 12,119 estimated for 2015 and expected to grow to 13,325 by the year 2020.
- The comprehensive buying demands of this segment can be greatly served with retailer product differentiation and improved store hours.
- This segment often responds to frequent and repeat business promotions.
- This segment visits Downtown for reasons such as, entertainment, outdoor recreation (walking), shopping, events, dining, conducting business with City offices, and the U. S. post office. Other reasons likely include attending church or trips to drop-off or pick-up school-aged children from school and other activities.
- Residents are critical for Downtown merchants as they are most likely to have higher rates of impulse spending and a need for purchasing daily necessities due to high frequency of visits.
- Effective strategies for this segment can be to inspire store loyalty through targeted marketing and customer incentives and by providing expanded product selection for daily and weekly necessities.

Tourists - Visitors

- Visitors tend to look for unique experiences and products.
- This segment has a unique composition in Webb City due to the draw of Route 66 and may include a high percentage of international visitors.
- This segment has a greater demand for entertainment options, as well as a need for convenience items that travelers may require.
- This segment is often dependent upon lodging operators as an information source. Effective strategies will include local lodging options.
- Strategies for serving this market include effectively developing and marketing the Downtown brand as a unique experience worthy of a visit.

COMMUNITY SURVEYS

In order to gather information about perceptions and desires for Downtown Webb City, the DREAM Initiative conducted focus groups and a telephone survey. Those surveyed indicated what they liked or did not like about Downtown and what businesses should be added to the present business mix. Participants also gave suggestions on what should be prioritized to improve Downtown and make it more appealing. Both the focus group and the survey results offer an important source of data about local consumer behavior.

Focus groups were conducted to gather initial information about Downtown Webb City relative to four general groups: Mayor and City Council; Longtime Residents; Chamber of Commerce Members; and The Downtown Advisory Group. Summarized Focus Group comments regarding retail development included:

- Participants indicated they try to do everyday shopping in Webb City, primarily at Wal-Mart. However, for specialty items, construction materials, and sometimes clothing, most participants noted they shop in the Joplin, Missouri Area.
- Some focus group participants indicated they shop online or sometimes travel to Kansas City, Missouri; Tulsa, Oklahoma; or Rogers, Arkansas for a wider variety of goods or specialty items.
- Participants felt Downtown was not moving in the wrong direction, but was perhaps stagnate.
- Most participants felt that Webb City should continue to promote historic Rt. 66 through town, but noted that signage is needed to help these travelers understand the route alignment.
- Participants felt that parking currently was not an issue; noting issues may arise during peak time and hit movie showings at the Downtown Route 66 theatre. However, they felt that with more business activity and less vacancies, Downtown would have parking issues.
- A similar sentiment was expressed regarding business hours; currently, there are few retailers or restaurants that need to be open into the evening.
- Participants generally felt that more dining options and specialty stores were needed in the Downtown business mix.
- Participants felt that major issues facing Downtown included lack of wayfinding and vacancies.

Upon completion of the Focus Groups, the DREAM Initiative conducted a Community Telephone Survey of Webb City residents. Survey findings relevant to Downtown retail development include:

- About 80% of respondents answered that they visited Downtown at least once a month.
- The only reason indicated for often visiting Downtown by a majority of respondents was "Government/Post Office" (62%). All other reasons were indicated by less than half of respondents.
- A majority (89%) feel that retaining the historic character of Downtown Webb City is "very" or "somewhat" important.
- A majority of respondents placed a high priority on adding family or

casual dining options (73%), clothing stores (54%), and/or fine dining (53%) to Downtown. Bars & nightclubs were ranked as the lowest priority.

- Majorities of respondents indicated they would like to see improvements to building façades (67%), pedestrian friendliness (56%), and the cleanliness of streets and sidewalks (53%) as high priority improvements.
- Respondents tended to be age 50 or older and most indicated they had lived in town for more than 10 years. Respondents demonstrated a wide range of incomes, but most were under $50,000 annually.

The priorities identified by the DREAM Community Survey tasks can help determine what retail mix may be successful and accepted in Downtown Webb City. An effective strategy will capitalize upon the existing consumer base, while attempting to attract additional consumers and new retail businesses. Figure 4, below, identifies the priorities for new businesses as indicated by the results of this task.

Figure 4: Downtown Business Priorities from Community Survey Tasks

Focus Groups		Community Phone Survey	
Casual/Family Dining	All Groups	Casual/Family Dining	73%
Convenience Store/Grocery	All Groups	Clothing Stores	54%
Clothing	3 Groups	Fine Dining	53%
Shoes	3 Groups	Bakery	49%
Specialty Shops	3 Groups	Convenience Store/Grocery	49%
Bakery/Coffee Shop	3 Groups	Ice Cream/Soda Fountain	47%
Art Galleries and Shops	2 Groups	Coffee Shop	46%
Bookstore	2 Groups	Bookstore	45%
Construction Supplies	2 Groups	Arcade/Youth Attraction	45%
Jewelry	2 Groups	Lodging	42%
Lodging	2 Groups	Art Galleries and Shops	35%
Day Spa	1 Group	Arts and Crafts Stores	33%
Furniture Store	1 Group	Antique Shops	28%
Gift Shop	1 Group	Bars/Nightclubs	10%
Live Theatre	1 Group		
Quilt Shop	1 Group		

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BUSINESS MARKET

Webb City, and the surrounding area, have a fairly active and diverse economy. Table 9, below, illustrates the total estimated employment in 2015, for the Webb City trade areas while Table 10 provides a listing of several of the region's largest employers. The center of employment activity in the region is obvious, with over two-thirds of the businesses on this list, and over 80% of the jobs indicated, being located in Joplin, Missouri.

TABLE 9: 2015 TOTAL EMPLOYMENT

	Downtown Webb City	PTA	STA
Employees	814	4,454	9,021
Businesses	73	458	884

TABLE 10: WEBB CITY AREA LARGE EMPLOYERS (200+ employees)

Employer	Business Type	Location	Employees
Con-Way Truckload Inc.	General Freight	Joplin	3,050
Mercy Health of Joplin	Healthcare	Joplin	1,310
Tri-State Motor Transit	General Freight	Joplin	1,135
Mercy Hospital Springfield	Healthcare	Joplin	1,000
ABM Janitorial Services	Janitorial Services	Joplin	702
Leggett & Platt, Inc.	Manufacturing - rubber products	Carthage	650
Aegis Communications	Telemarketing	Joplin	480
Eaglepicher Technologies	Manufacturing - batteries	Joplin	450
Cardinal Scale Manufacturing Company	Manufacturing - scales	Webb City	450
Wal-Mart	Department Store	Joplin	400
Jasoner Products	Wholesale Grocery	Joplin	399
Ducommun Labarage Tech	Manufacturing - navigation instruments	Joplin	350
Wal-Mart	Department Store	Webb City	300
McCune-Brooks Regional Hospital	Healthcare	Carthage	290
Able Mfg & Assembly	Specialty Trade Contractor	Joplin	267
Steadley Company	Manufacturing - springs	Carthage	250
Rock-Tenn Company	Milling - paperboard	Joplin	250
City of Joplin	Legislative Body	Joplin	223
D & D Sexton, Inc.	General Freight	Carthage	218
Wal-Mart	Department Store	Carthage	210
Tamko Building Products	Manufacturing - asphalt shingle & coating	Joplin	200
Systems & Services Tech, Inc.	Data Processing, Hosting, & Related	Joplin	200

Source: Joplin Regional Partnership

COMPARATIVE MARKET ANALYSIS

Downtown Webb City is located within the Joplin metropolitan area. Numerous Joplin businesses serve the regional retail market. Other attractions and events are provided to bring visitors and shoppers to Webb City and to Downtown. The Webb City Chamber of Commerce hosts events including Springtime on Broadway and Route 66 Cruise Nights, along with seasonal events. The City provides about 149 acres of parkland in 5 parks; with King Jack Park along Highway 171 representing 144 acres of that parkland. King Jack Park provides a number of attractions and events including:

- The Mining Days Event Center
- Outdoor Amphitheater
- The Praying Hands Monument
- The Webb City Farmer's Market
- The Kneeling Miner Statue
- The Georgia City Bridge
- Fishing lakes and trails

TENANT MIX & LAND USE

The Land Use, Building & Infrastructure Survey, conducted in 2009 and subsequently updated in 2015 for this report, gathered information on how Downtown parcels of land are being used. Table 11, on the following page, identifies a total of 213 parcels on which are located 187 primary buildings that represent about 639,399 square feet of first-floor space. Thirty-six of these buildings were identified as retail and restaurant uses, representing about 76,557 square feet of space. About 31,750 square feet of retail space was vacant and about 4,600 square feet of restaurant space was vacant.

Table 11 identifies 44 office and service buildings along with 2 mixed-use structures that represent about 144,357 square feet of space with 16,400 square feet of vacancy. Overall, 97,100 square feet of Downtown space is vacant. However, several of these vacancies are located in industrial buildings. Some of these industrial spaces may be suitable for conversion into mixed-use properties with retail uses on the first-floor. The overall amount of vacant space that is suitable for easy conversion to retail use is about 52,750 square feet with three industrial locations that could provide another 38,400 square feet.

The vacancy rate is about 48% for retail space, 44% for restaurant space, 11% for office and service uses, 13% for mixed-use space and 15% for industrial space. These are high vacancy rates and point to serious issues for Downtown Webb City.

TABLE 11: LAND USE TOTALS & SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Residential					
Single-Family	47	55	63,024	0	0.0%
Multi-Family	6	10	26,450	0	0.0%
Sub-Total	**53**	**65**	**89,474**	**0**	**0.0%**
Commercial					
Office / Service	36	44	136,122	15,350	11.3%
Retail	26	30	66,134	31,750	48.0%
Restaurant	5	6	10,423	4,600	44.1%
Sub-Total	**67**	**80**	**212,679**	**51,700**	**24.3%**
Mixed-Use	6	2	8,235	1,050	12.8%
Industrial	44	31	298,567	44,350	14.9%
Public / Institutional	10	9	30,444	0	0.0%
Public Parking	12	NA	NA	NA	NA
Park / Recreation	4	NA	NA	NA	NA
Vacant Lot	17	NA	NA	NA	NA
TOTAL	**213**	**187**	**639,399**	**97,100**	**15.2%**

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

Table 11 also indicates the overall composition of the existing occupied square footage in Downtown Webb City. The single largest land use in Downtown by acreage is recreational due to King Jack Park. The single largest land use by building square footage is industrial with 298,567 square feet (about 47% of total first-floor square footage); primarily due to the Cardinal Scale and Webb Corp locations in the northeast corner of Downtown. The remaining land-uses are composed of about 21% office / service, 14% residential (4% of the total as multi-family), 10% retail, 5% public / institutional, 2% restaurant, and 1% mixed-use.

Retail and restaurant uses are critical to establishing a vibrant business atmosphere. However, in Downtown Webb City, uses other than retail or restaurant uses account for about 87% of the available space. This imbalanced situation may require the City of Webb City to review its zoning code and take aggressive action to preserve prime, first-floor spaces for retail and restaurant use. Additionally, the City could encourage the conversion of existing office/service spaces, and some of the industrial spaces, into retail, restaurant, or mixed-use space. The City should also carefully consider future expansions of existing industrial uses.

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MARKET RESEARCH FINDINGS

RETAIL ANALYSIS

A review of market conditions provides an idea of the possible new and existing business potential for Downtown Webb City. Downtown contains about 220,914 square feet of existing first-floor commercial space that includes:

- 10,423 square feet of restaurant space (4,600 square feet vacant)
- 66,134 square feet of retail space (31,750 square feet vacant)
- 136,122 square feet of office/service space (15,350 square feet vacant)
- 8,235 square feet of mixed-use space (1,050 square feet vacant)

Data shows that the overall retail/restaurant space in Downtown is generating only about $928,000 in annual sales (sales do not include auto dealers and related items, grocery stores, gasoline stations, or non-store retailers). The retail component (removing any square footage for auto dealers and related items, grocery stores, gasoline stations, or non-store retailers) is generating $608,000 or about $17.69 per occupied square foot. The restaurant component is generating about $319,000 or about $54.86 per occupied square foot. While the retail sales per-square-foot average is very low, the restaurant sales average is within the ranges found in Missouri DREAM communities. For retail locations, a more likely, but still conservative sales estimate of $50 per square foot can be used. Using $50 per square foot as an average, the 52,750 square feet of space that can be easily used by a retail or restaurant use represents about an additional $2.6 million in potential sales to the City. This amount of potential sales could increase significantly if the three industrial spaces noted could be converted to retail, restaurant, or mixed-use space.

Figure 5, at right, demonstrates the split of Downtown Annual Sales from 2015 between retail and food & drink uses.

Figure 5: Downtown Webb City Annual Sales

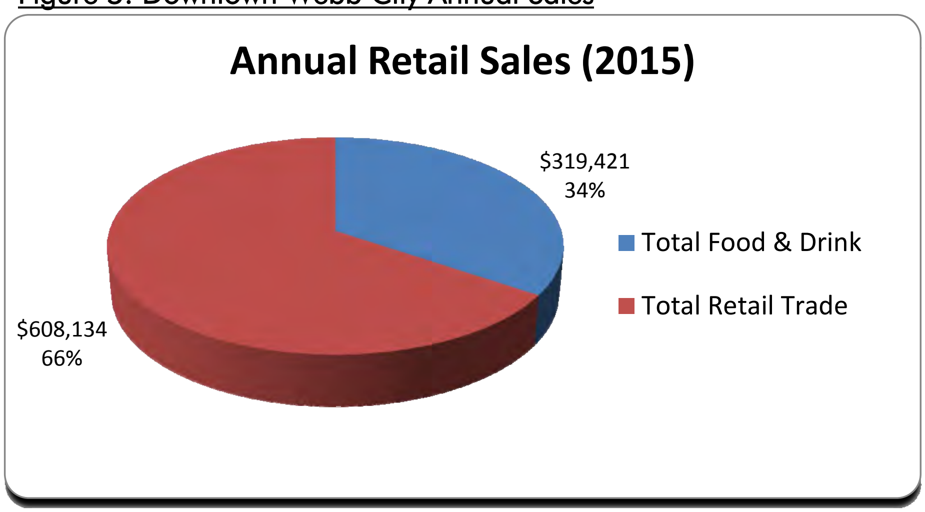


Table 12, below, provides a breakdown of some of the retail establishments in Downtown Webb City, the PTA, and the STA that are currently productive in generating sales. Table 13, also below, provides a specific sampling of some of the main Downtown businesses. Additionally, existing retail spaces are shown in the map found in Appendix C. The retail services listed in tables 12 and 13 are organized according to the NAICS to allow for comparison of retail activity by sectors or categories. Recommendations can then be developed to address any gaps in retail service. Due to differences in allocating businesses to various categories, these tables may not match completely. The tables also are meant to provide indicative information of business types rather than a thorough listing of every Downtown Webb City business in these categories.

TABLE 12: RETAIL ESTABLISHMENTS

	Downtown Webb City		Primary Trade Area		Secondary Trade Area	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
TOTAL (Pedestrian-generating businesses):	12	60	101	1,380	175	2,132
Furniture & Home Furnishings Stores	1	3	2	8	3	12
Electronics & Appliance Stores	0	0	1	3	7	51
Bldg. Materials & Garden Equipment & Supplies	1	2	5	55	12	202
Food & Beverage Stores	1	9	13	121	23	178
Health & Personal Care Stores	0	1	9	97	11	102
Clothing & Clothing Accessories Stores	1	1	2	5	4	16
Sporting Good, Hobby, Book & Music Stores	1	1	4	10	8	22
General Merchandise Stores	0	1	4	377	6	391
Miscellaneous Store Retailers	2	5	11	32	21	63
Arts, Entertainment & Recreation	1	5	9	56	14	70
Accommodation	0	0	2	2	6	118
Food Services & Drinking Places	4	32	39	614	60	907
Total Businesses (including non-retail)	73		458		884	
Total Employees (including non-retail)	814		4,454		9,021	
Total Residential Population	398		12,119		30,249	
Employees/Population	2.05		0.37		0.30	

TABLE 13: EXISTING RETAIL

NAICS Industry Group	Store Name
Automotive	Vans Vans & More Take A Break Casey's General Store
Furniture & Home Furnishings Stores	Art Gallery American Furniture Classics
Electronics & Appliance Stores	PC ER
Clothing Stores	Embassy Logowear Cool School Shoppe
Sporting Goods/Hobby/Musical Instrument Stores	Outdoor Addicts Outfitters
Health & Personal Care Stores	Bruner Pharmacy
Miscellaneous Retailers	Claw Paws Pet Salon
Motion Picture Theaters	Route 66 Movie Theater
Beer, Wine, and Liquor Stores	Cigs & Suds
Used Merchandise Stores	Trader's Gun & Pawn Military Collectors Services The Hand Up Store Beaver's Dam
Food Services & Drinking Places	Longhorn Bar Norma's Kitchen Thai Spice

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

TABLE 14: CONSUMER EXPENDITURES

	Downtown Webb City	Primary Trade Area	Secondary Trade Area
Median Household Income	$34,249	$35,622	$40,177
Average Annual Household Expenditures for Selected Retail Sectors			
Food	**$4,734**	**$5,330**	**$6,064**
Food at Home	$2,965	$3,323	$3,754
Food Away from Home	$1,769	$2,006	$2,309
Apparel and Services	**$1,259**	**$1,407**	**$1,615**
Household Merchandise	**$1,168**	**$1,345**	**$1,543**
Electronics	$350	$393	$450
Household Goods	$818	$951	$1,093
Household Care	**$1,384**	**$1,677**	**$1,932**
Transportation and Travel	**$3,360**	**$3,824**	**$4,369**
Transportation	$2,660	$2,996	$3,403
Travel	$700	$828	$966
Health & Personal Care	**$1,077**	**$1,209**	**$1,361**
Health Care	$411	$478	$539
Personal Care Products	$666	$731	$822
Entertainment & Recreation	**$1,580**	**$1,826**	**$2,084**
Total for Selected Sectors	**$14,563**	**$16,618**	**$18,967**

The largest portion of expenditures are spent on food (at home and away from home), followed by transportation and travel expenditures. Table 14 also shows very slight percentage differences in these expenditure categories between Downtown the PTA and STA. Downtown has the lowest median household income and spends the least on these categories.

Table 15, on the following page, suggests the City's potential purchasing power by providing the 2015 estimate of the number of households at regular income level cohorts. The table shows that about half of Downtown households have an annual income of less than $35,000 and almost 90% have an annual income of less than $75,000. Inhabitants of the PTA and STA have slightly higher annual incomes with 84% of the PTA households with an income of 75,000 or less and 79% of the STA households with an income of $75,000 or less. Determining the retail sectors that have unmet demand, and that will appeal to the higher-income residents found in the PTA and STA, is a critical step for Downtown Webb City revitalization.

TABLE 15: HOUSEHOLD INCOME (2015 Estimated)

Income Level	Downtown Webb City	Primary Trade Area	Secondary Trade Area
Less than $ 15,000	55	994	1,952
$ 15,000 - $24,999	21	607	1,350
$ 25,000 - $34,999	26	689	1,492
$ 35,000 - $49,999	41	826	2,014
$ 50,000 - $74,999	36	804	2,109
$ 75,000 - $99,999	9	397	1,225
$ 100,000 - $149,999	10	270	819
$ 150,000 - $199,999	1	37	179
$ 200,000 +	2	55	184
Total	201	4,679	11,324

POTENTIAL STORE SPACE SUPPORTED

The proximity of the Joplin retail market impacts the retail activity in the Webb City retail markets. The pull of the Joplin market results in a number of categories where retail demand is being easily met. There are also a number of categories demonstrating unmet demand. Some retail demand is also likely being met through internet purchases. However, the significant amount of retail in the region presents an opportunity to draw visitors to Downtown and capture more retail activity.

Table 16, on page 26, shows the retail categories that are demonstrating unmet retail demand (the difference between retail demand and actual sales) for Downtown. The Analysis considers the total unmet retail demand within the STA and the estimated average retail and restaurant sales per square foot of $50.00. While the table shows that Downtown could support an estimated 740,000 square feet of retail/restaurant space, this number is inflated by the department store use, which is not likely to locate in a downtown environment due to today's retail market forces. Removing the demand shown for this use leaves a total of about 525,000 square feet. Downtown Webb City has a significant amount of vacant first-floor space that can be easily used by a retail or restaurant use (52,750 square feet from Table 11 on page 21). Even including the three vacant industrial locations that could provide another 38,400 square feet of retail, restaurant, or mixed-use space the total amount of potential retail square footage for the unmet demand being demonstrated is almost six times the amount of vacancy available and is not likely to be met by Downtown Webb City alone.

The shortage of retail space relative to the unmet demand being demonstrated suggests that significant amounts of residents are leaving Downtown and the PTA to shop. Downtown could seize this opportunity to better compete with the Joplin retail market. **With the high amount of vacant space available, the initial objective for Downtown Webb City should be to fill the existing vacancies with retail or restaurant uses.** Secondary goals, once most vacancies are addressed, may include converting existing non-retail ground-floor uses to retail or restaurant space or encouraging office and service uses to relocate to upper-floors and side streets. However, at this time, existing vacancies should be the top priority.

TABLE 16: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Potential Retail Area (sq.ft.) Supported[2]
~~Department Stores Excluding Leased Depts. (NAICS 4521)~~	~~$ 10,734,233~~	~~214,685~~
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$ 5,467,337	109,347
Full-Service Restaurants (NAICS 7221)	$ 4,032,854	80,657
Building Material and Supplies Dealers (NAICS 4441)	$ 3,147,438	62,949
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$ 2,856,699	57,134
Home Furnishings Stores (NAICS 4422)	$ 2,038,973	40,779
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$ 1,895,060	37,901
Shoe Stores (NAICS 4482)	$ 1,877,903	37,558
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$ 1,824,162	36,483
Drinking Places - Alcoholic Beverages (NAICS 7224)	$ 1,636,191	32,724
Special Food Services (NAICS 7223)	$ 727,364	14,547
Other Miscellaneous Store Retailers (NAICS 4539)	$ 523,517	10,470
Florists (NAICS 4531)	$ 184,549	3,691
Specialty Food Stores (NAICS 4452)	$ 30,218	604
TOTAL:	**$36,976,498**	**739,530**
ADJUSTED TOTAL:	**$26,242,265**	**524,845**

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

[2] Based on an estimated $50.00 in retail and restaurant sales per square foot and existing retail building inventory and activity in Downtown Webb City.

Table 16 provides a suggestion for prioritizing potential retail stores for attraction to Downtown locations. While unmet demand in some categories is too small to support a store, existing retailers could capture some of the demand in these specific retail groups by expanding their floor area and adding new products. However, Downtown should continue to collaborate with the City and Chamber to attract new retailers to the existing Downtown vacancies. Other conclusions that are drawn from Table 16, include:

- As noted, the retail sector of "Department Stores" is demonstrating a great amount of unmet demand. Due to today's market forces, a department store is not likely to locate in a Downtown environment; therefore this unmet demand is removed from this analysis. However, the retail gap in this sector is noteworthy because it may indicate an opportunity for existing merchants to adjust their product lines to carry department store types of goods.

- The retail sector of "Electronics & Appliance Stores" is demonstrating significant unmet demand. This is a product category for which many consumers shop on the internet. Some of these products could be combined with "Home Furnishings" to develop a larger store. A large electronics or appliance store can also be a Downtown anchor. Stores of this type usually include a showroom that can decrease their sales per square foot. Although stores such as mobile phone stores can occupy a small location and generate a sizeable amount of sales.

- In the focus groups and community telephone survey, respondents identified various forms of dining, primarily casual, as one of the most desired new businesses. The Retail Market Analysis supports that there is existing unmet demand for more full-service restaurants as well as other food services, drinking places, and specialty food stores. However, a restaurant will be more successful in an area with a high visitor draw or in close proximity to a vibrant residential market. Unmet demand exists for restaurant uses, but Downtown will need to focus on attracting unique shops and developing more residential units in or near Downtown to help support the restaurant trade.

- "Building materials and Supplies Dealers", while demonstrating just over $3.1 million in unmet retail demand, are not generally viewed as a tourism shopping retailer. There are several large retailers of this type that exist within the region. 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 still consider smaller versions of these stores for locations along side streets or in larger, warehouse -type, buildings that are unappealing to retail users.

- "Sporting Goods/Hobby/Musical Instrument Stores" are demonstrating significant unmet retail demand. This type of store can have a broad range of characteristics and may include non-retail services. A sporting goods store can be a good candidate to fill buildings that were built as an industrial use.

- The focus group participants and telephone survey respondents indicated that clothing was an item for which they would like to see more variety of in the community. However, the clothing category is demonstrating unmet demand specifically in "Shoe Stores." Additionally, this category could be combined with "Jewelry, Luggage, and Leather Goods", which is also demonstrating significant unmet demand, to develop a larger store. This type of store can range from a boutique-style shop to a larger anchor store.

- "Office Supplies, Stationary, and Gift Stores" could be combined with another store such as a computer store, to develop a larger store. Unless the store provides a focus on gifts, many office products will not appeal to visitors, but will serve existing businesses and residents.

- "Drinking Places - Alcoholic Beverages" represent an opportunity to address some unmet demand. However, the nature of businesses in this category can be problematic. City leaders should understand there is unmet demand for Downtown to fill, but may wish to adjust zoning or liquor codes to ensure that a minimum percentage of sales at such a business is food-related. Additionally, the City should make certain that restaurants are able to serve alcoholic drinks with a meal, resulting in a higher sales ticket. These types of businesses could locate in existing buildings and should be well regulated and policed to address any negative impacts on Downtown.

- Stores selling products in the categories of "Special Food Services", "Other Miscellaneous Store Retailers", "Florists", and "Specialty Food Stores" are all showing smaller amounts of unmet demand. Downtown leaders may not want to prioritize these businesses for attraction.

- Existing stores that sell miscellaneous products in a format such as a specialty shop can help satisfy some of the unmet demand by adding square footage or adjusting product lines. Developing a critical mass of these types of shops will encourage greater pedestrian activity and will complement existing attractions, dining, and entertainment options.

AVAILABLE RETAIL SPACE INVENTORY

The vacant properties identified in Downtown Webb City are shown below on Table 17, and on the 1st Floor Vacancy Map in Appendix D. As of May 2015, there are 26 vacancies including the three industrial properties previously noted. There are a couple of other industrial vacancies that are not suitable for conversion that are not included as opportunities for this analysis. On Table 17, in some cases, there are multiple vacant buildings on the same lot at a single address. The overall total vacant space depicted on the table and map is 91,150 square feet. These vacancies range from 450 square feet to 14,400 square feet. The average available existing vacant space in Downtown is about 3,500 Square feet. There are some opportunities where storefronts are adjacent and may be able to be combined to develop a larger store.

TABLE 17: POTENTIAL NEW RETAIL

ID	Address	Available Sq.Ft.	Potential Retail
1	221 W. Daugherty Street	850	Florist
2	221 W. Daugherty Street	450	Florist
3	217 W. Daugherty Street A	500	Phone store / Small elctronics
4	217 W. Daugherty Street B	600	Home Furnishings
5	113-115 W. Daugherty Street	3,500	Restaurant
6	111 W. Daugherty Street	2,300	Jewelry Store
7	216 N. Main Street	3,550	Restaurant
8	208-210 N. Main Street	3,600	Music Store
9	112 N. Main Street	2,000	Boutique (gifts, jewelry, shoes, leather goods)
10	4 S. Main Street	3,600	Restaurant
11	10 S. Main Street	750	Boutique (gifts, jewelry, shoes, leather goods)
12	10 1/2 S. Main Street	1,450	Restaurant combine with #13
13	12 S. Main Street	1,600	Restaurant combine with #12
14	18 S. Main Street	2,000	Office Supplies
15	20-22 S. Main Street	3,700	Jewelry Store
16	34 S. Main Street	4,000	Boutique (gifts, jewelry, shoes, leather goods)
17	110 W. First Street (Industrial)	12,000	Sporting Good / Hobby Store
18	110 W. First Street (Industrial)	12,000	Bldg. Materials / Home Furnishings
19	103 N. Main Street	1,050	Office Supplies
20	201 N. Main Street	1,750	Restaurant
21	124 East Broadway (Industrial)	14,400	Micro Brewery
22	25 S. Main Street	3,300	Applicance Store combine with #23
23	27-29 S. Main Street	4,250	Applicance Store combine with #22
24	101 S. Main Street	3,550	Restaurant
25	101 S. Main Street	2,300	Home Furnishings
26	202 E. Daugherty Street	2,100	Computer Store
	TOTAL:	91,150	

In matching the existing vacant storefronts with the types of businesses demonstrating unmet retail demand, the City should consider the size, condition, location (especially if located along Main Street or Rt. 66), and proximity of the vacancy to similar businesses. Table 17 also lists the retail suggestions for each vacant space that might work for Downtown Webb City. These are suggestions to develop a healthy retail mix and are not the only solution to filling Downtown's current vacancies.

Downtown Webb City Retail Goals

- **Develop Support Programs for Existing Businesses**

  The Webb City Chamber of Commerce works to stimulate economic growth, business and industry expansion, and provide relevant resources and information to its membership. The Chamber should coordinate with the City to recognize outstanding businesses, provide ribbon cutting ceremonies for new stores, develop business seminars, and continue to provide monthly networking events and Chamber member recognition. Existing workshops and seminars should be expanded to inform retail business owners about product differentiation, marketing, customer service, retail trends, product presentation, window displays, and the importance of hours and days of operation, and how service and quality of product differentiate them from big box or franchise stores.

  Some of Downtown's retailers have been in business for many years and could benefit from networking with other store operators, hearing fresh ideas, reviewing information regarding changing retail markets, and developing a support structure with which to discuss their common issues and needs.

- **Encourage innovative adaptive reuse of industrial spaces**

  There are currently three vacant industrial buildings that could offer an innovative developer an opportunity to put these properties into productive use. These buildings are indicated by identification numbers #17, #18, and #21 as found Table 17 on page 29 and on the 1st Floor Vacancy Map in Appendix D. Uses currently proposed are for stores that can require large amounts of space such as building materials & supply stores, home furnishing stores, sporting goods stores, and hobby stores.

  Additionally, one of the locations (#21) is located at 124 E. Broadway Street; which is Route 66. This building could be developed as a restaurant/bar with outdoor seating that fronts on Route 66 and would therefore generate significant activity and excitement for visitors through town. The suggestion for this location provided in this analysis is for a microbrewery to take advantage of the craft beer -themed restaurant phenomena.

  Other uses for these properties could include residential on upper floors, but first floor uses should be retail activity generators.

- CONTINUE AND IMPROVE DOWNTOWN MARKETING EFFORTS

Downtown Webb City needs to differentiate itself from the other communities within the Joplin retail market. The City has promoted the Route 66 connection and should continue to do so. The DREAM Building and Streetscape Concepts report from May 2014 notes a number signs and buildings evidencing Route 66-style architecture, along with several ghost signs that could be repainted. These elements can be unified into a unique design theme that sets Webb City, and Downtown, apart from surrounding communities.

A marketing effort should complement the Route 66 design theme. While, the DREAM marketing task is occurring concurrently with this retail analysis, visitor niches that Webb City should develop include:

- ◊ Route 66 aficionados:
  - ⇒ This is a specialty market that may have significant income potential for their hobby and travel expenditures
  - ⇒ Focus on the needs of this market
  - ⇒ Identify strategies to reach this market during the trip-planning stage to maximize length of visits
- ◊ Weekend visitors
  - ⇒ Develop day trip activities and restaurants for regional residents
  - ⇒ It is critical that Downtown attract more retail/restaurant uses to fill existing vacancies
- ◊ Visitors seeking boutique stores
  - ⇒ Approximately 6 to 10 of these stores working together can begin to develop into an attraction by themselves
  - ⇒ Potential store categories include nostalgia, antiques, specialty foods, and art galleries
- ◊ Goods and services for local residents
  - ⇒ Downtown Webb City could focus on meeting local needs
  - ⇒ This strategy will likely not result in a large impact, but the addition of categories such as office supplies, home furnishings, and building materials should expand the Downtown retail base

Downtown Webb City could focus on a single niche from the above or work to attract businesses that would serve a combination of markets. The Chamber should also maintain close ties with existing stores and work to develop a niche strategy that builds upon categories already found in Downtown.

- MONITOR THE MIX OF EXISTING DOWNTOWN USES

  It is important that Downtown try to develop more retail space and potentially more residents. New buildings could be added on open lots or existing non-retail, non-residential uses could be converted. Regardless of the City's strategy to address the mix of Downtown uses, the City should track existing businesses to monitor available storefronts and the overall store mix.

  As noted, non-retail/restaurant uses account for about 87% of the available space. The City should review its comprehensive plan and zoning code to monitor and improve this imbalanced situation. Actions could include restricting future industrial use and expansion in Downtown, and encouraging this use elsewhere in the City. Additionally, the City could encourage the conversion of existing office/service spaces, and the previously mentioned three industrial spaces, into retail, restaurant, or mixed-use space.

  A close relationship between the City, Chamber, and the Downtown businesses is critical. A regular gathering of Downtown interests, perhaps before or after Chamber meetings, could identify minor issues before they grow into major problems for Downtown. The City should continue to market vacancies and try to fill them with stores from the targeted retail list found in the analysis.

- IMPROVE THE QUALITY OF EXISTING RESTAURANTS AND RETAIL BUSINESSES

  The sales per square foot of retail and restaurants in Downtown Webb City could be improved upon. This analysis assumes a sales per square foot of $50 for retail space. However, the actual demonstrated amount is $17.69 per square foot for retail sales and $54.86 per square foot for restaurant sales. These are extremely low sales number and suggests that the existing Downtown retailers and restaurants are selling primarily low quality products and low ticket meals.

  The restaurant situation may be due to local alcohol sales restrictions. The City should review local and State liquor regulations to allow for flexibility of restaurants to serve alcohol, particularly where a restaurant is located in Downtown in proximity to a church.

  Improved retail stores and products will benefit Downtown restaurants. However, the City and Chamber should also encourage merchants to focus on store aesthetics, customer service, and product lines of broad interest to develop stronger retail sales.

- CONTINUE TO DEVELOP DOWNTOWN EVENTS

  Downtown Webb City has developed some events and should continue to use events to raise its visibility as a shopping and entertainment destination. The existing Farmer's Market is very well-known and a good example of a high profile event. Residents and visitors attend the event, and hopefully take a trip through Downtown and see a store they would like to patronize; either that day or at a later time. Events could include live music, sidewalk and window sales, and food tastings from Webb City area restaurants. An event with alcohol should always include food and end earlier in the evening.

- CULTIVATE LOCAL ENTREPRENEURS

  As Downtown works to keep first-floor locations occupied with retail stores, efforts should also be made to identify and cultivate new retailers from within the community. A likely source of entrepreneurs may come from the families of residents that work in Joplin. These family members may be able to rely on the stable income of the commuter to pursue a start-up business.

  As the Downtown organization develops, the group should coordinate with the Chamber to develop entrepreneurial training programs such as Operation Jumpstart (www.operationjumpstart.biz). Informational events and meetings with local bankers and potential investors can also help expose potential new start-ups to Downtown opportunities.

- ENCOURAGE EXISTING RETAIL EXPANSION

  It is important to understand that consumers will travel greater distances for a better choice in variety. With Webb City's proximity to the wide variety of products offered in Joplin and other surrounding markets, as well as the internet, it is critical that Downtown demonstrate a good variety of entertainment, shopping, and dining options. Downtown can broaden its retail variety by encouraging existing retailers to address categories of unmet demand as identified in Table 16 on page 26. These areas represent opportunities for local businesses to expand sales floors or add product lines.

DOWNTOWN WEBB CITY STRATEGIES

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

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

GREAT STREETS EQUAL GREAT PLACES

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 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. A 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.

A downtown should have mixed land uses and extensive pedestrian amenities. Downtowns should have people of all ages moving throughout the district and should have unique identifiable areas such as outdoor seating, water features, and public art. Elements that create great streetscapes that are comfortable and safe and still provide a high quality pedestrian environment, 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 the local heritage and brand.
- Seamless streetscapes with lighting, banners, planters, 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 cafes, benches, and street trees.
- High-quality amenities such as public art and other public amenities such as restrooms.
- Safety elements for pedestrians such as lighting, crosswalks, accessible ramps, bike racks, and landscape 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 dedicated bicycle lanes.
- Continuous on street parking and enforced vehicular speed regulations.
- Streetscape element maintenance as a top priority.

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; and 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 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 user needs and should not only provide parking spaces, but be aesthetically pleasing and safe for pedestrians. Planting buffers at the edges of parking lots can help screen the parking and provide some shade. Landscaped islands should be included throughout the lot to improve aesthetics and minimize storm water run-off. A clear and well lit pathway should be provided for pedestrians as well as identifying signage.

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 a downtown. Rather, where possible, they should park in the rear of their establishments or at parking lots designated for employee parking.

Public Spaces and Plazas

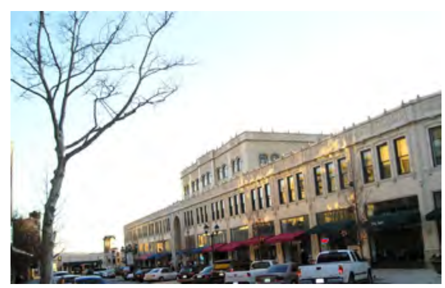
Public spaces and plazas are important components to successful downtown destinations. Many public areas suffer from lack of funding, maintenance, and planning. Public space revitalization, similar to properly maintained facades and streetscapes, have a direct impact on a downtown's economic, environmental, social, and cultural image. Public spaces and plazas 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. Public spaces and plazas should:

- Be easily accessible and visible from the street.
- Preserve and maintain trees and landscaping that provide shade, color, and natural edges.
- Be a flexible, pedestrian-friendly area that can serve multiple purposes and accommodate activity space for special events.
- Incorporate adjustable seating that complements traditional park benches.
- Be a top priority where the City enforces cleanliness and maintenance standards.
- Contain regulatory park signage and be policed by appropriate City staff.
- Always be safe.

Environment & Appearance

Downtown Webb City's historic character and architecture layout is the key to its draw as a unique retail environment. Protecting and improving the quality of the built environment is critical for Downtown revitalization success.

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 Webb City. New public sector mechanisms such as a Community Improvement District (CID) should be considered to develop 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 Downtown Webb City's priorities:



- The City must continue to encourage Downtown façade restoration. The rehabilitation and productive reuse of Downtown buildings is the cornerstone of the revitalization effort. Building façades are a public feature of Downtown Webb City that the City should work to maintain and improve. The City should develop an incentive program that can be used by private property owners to improve the public façades of their buildings. Incentive programs should also recognize the need for improvement to the side and rear of buildings, some of which have attractive faces and entryways. Building incentives can be granted with conditions, providing an opportunity to ensure high-quality improvements. Downtown Webb City should seek mixed-use projects that include residential units.

- Continue to leverage the Route 66 brand and architecture to improve the visitor's experience in Downtown. The existing Route 66 buildings and signage complement the older original Downtown buildings and should be enhanced. Any infill construction should be sensitive to both of these existing distinct building styles.

- 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.

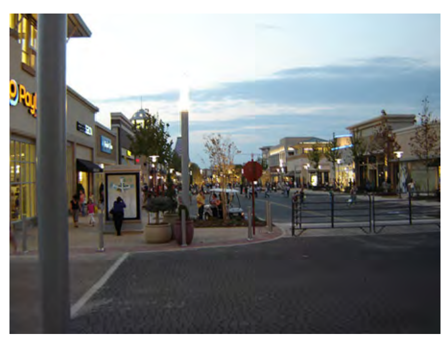
BUSINESS RETENTION, EXPANSION, & RECRUITMENT

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 collaboration of the City and Chamber currently works to provide economic development services for the City. However, there is no specific focus provided on Downtown Webb City. When the Downtown organization develops, it should seek to attract new retail uses and encourage existing merchants to focus on improving the quality of the goods and services that are currently provided. The collaboration of these groups to provide economic development services should also monitor Downtown vacancies. A vacant lot and space listing should be developed and include suggestions of the type of business for which the available space is best suited. Listings should also be available online and appropriate buildings submitted to websites such as www.locationone.com. The Downtown group should develop a listing of target businesses to contact. This listing should be limited to retail, restaurants, or unique services for Downtown. Businesses in Joplin may be likely candidates for expansion by opening another location in Downtown Webb City.

The Downtown group should also maintain a list of local bankers and real estate agents to ensure potential investors have up-to-date contact information when they inquire about property. Other information should include descriptions of available incentives (e.g. grants, forgivable loans), profiles of successful projects implemented by public/private partnerships, and testimonials from successful businesses in Downtown. Involvement of property owners as part of the support system for encouraging private investment is critical.

A Business Retention, Expansion, and Recruitment campaign should foster the local existing entrepreneurial spirit. Small businesses are the core of local economies and can generate significant job growth and revenue. Downtown locations are, by nature, less costly to a small-business startup than a newer location. Additionally, a chain store or big box store is typically not interested in the smaller confines of a downtown location. The Downtown group and the Chamber should work to identify local entrepreneurs. Through programs such as www.operationjumpstart.biz, Downtown leaders can assist business start-ups and help connect aspiring business owners with financial and technical resources.

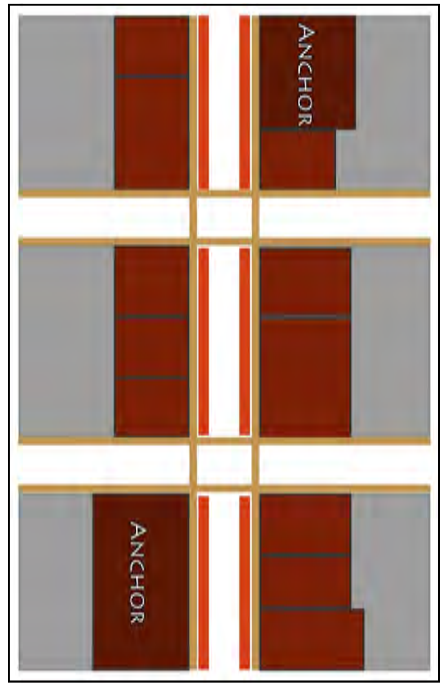


Limit Non-Retail Use

An appropriate mix of retail is key to Downtown Webb City's success. A well developed mix of uses will generate pedestrian traffic. Too often the main retail strip in a downtown demonstrates an overabundance of service-oriented uses. These service-oriented businesses are important to the local economy, but may take up valuable sales tax revenue-generating retail space. The City should focus on creating and maintaining continuous retail locations, primarily along Main and Broadway Streets in Downtown. While there are smaller pockets of retail elsewhere in Downtown, pedestrians will want to shop along easily walked streets. Pedestrian-friendly loops should be developed that encourage a walk of about one-quarter mile in length or a five to ten minute stroll past Downtown businesses. Anchors are large, well-known attractions that draw many customers. Anchors are usually retail stores or restaurants, but they can also be an institution or a collection of establishments. Anchors include the following uses:

- Movie Theatres
- Farmer's Markets
- Grocery Stores
- (And to a smaller extent) Local Unique Restaurants

The City and Chamber should maintain close relationships with existing anchors. New anchors should be encouraged where possible and promotions should be developed to showcase them. The City should consider the locations of anchors when planning public construction projects so as not to disrupt business any more than necessary.



Promote use of Upper Floor Space

A strong residential presence is a key component to a prosperous downtown. Residents in a downtown enjoy close proximity to entertainment venues, restaurants, and shopping. These residents have the ability to expand the Downtown retail market by creating additional demand for products and services. Downtown residents also ensure that an area has activity, even when businesses close.

Webb City has a stable ownership market surrounding Downtown. There are several buildings that could accommodate residential development through apartments, condominiums, or lofts on the upper floors. There are some large buildings that could be converted to residential use without damaging the historic integrity of the building. It is critical that the City work to ensure that new rental units are high-quality. Quality will be the key in attracting residents and maintaining Downtown Webb City property values.

Enhancing the Purchasing Experience

Unique shops thrive when they can work together to create a critical mass of stores that draw customers. Consumers want an environment that is safe, clean, friendly, and offers plenty of variety. The consumer chooses the downtown shop over the shop off of the highway for the experience, not for the efficiency of buying everyday items.

Downtown Webb City must convey a comfort level that welcomes shoppers, diners, and visitors in the context of its unique experience. Merchants can add to the Downtown unique experience through retail improvements that include:

- Extending store business hours.
- Carrying more unique or higher-end items that can't

be found elsewhere along with expert, personalized, assistance and extraordinary customer service.

- Providing shopper service amenities like gift wrapping, free shipping, convenient return and exchange policies, recommendations to other Downtown shops and restaurants, and special orders.
- Making use of the internet and social networking to efficiently promote the store.
- Requiring employees to utilize off-street parking, reserving on-street spaces for customers. Collaborate with other store owners to extend this concept throughout Downtown Webb City.

Attracting Customers

Attracting customers is an integral component of retail success. Downtown Webb City has an overall established pool of customers and needs to continuously reach-out to new customers to maintain and expand this base. Businesses should use existing shoppers as a source of referrals to develop repeat customers. By creating special promotions that target specific Downtown segments such as employees, a merchant can build loyalty among that segment. Cultivating a customer base in this manner will help a retailer develop a stable source of business.

Marketing

The promotion of attractions, businesses, and events is a major component of retail development. These promotions should be spearheaded by local organizations that recognize the necessity of reacquainting long-time residents, and introducing newer residents and visitors, to Downtown Webb City. As noted, Downtown should continue to build upon the Route 66 brand and increase its viability as a venue for events, festivals, parades, and concerts. These activities bring people Downtown and expose them to Downtown businesses. The marketing strategy for Downtown Webb City should provide a mix of events, advertising, and promotions that reflect different aspects of the region, history, and cultural heritage.

RETAIL PRESENTATION & OPERATIONS

The appearance of a retail store is essential to its success. A store's appearance begins at the sidewalk and includes the storefront, entrance, and windows. Stores must appear interesting and inviting at the sidewalk. Simple additions of planters or window boxes that flank the entrance to the store add color and life to the street. Pedestrians may be stopped by a plant, bench, or sign attracting them to the store window. 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 store entrance should be recessed from the sidewalk to emphasize the entry, provide shelter, and remove the open door from the pedestrian path. The entrance should be ADA compliant. The door should provide a view into the building as well as a sense of openness. Rear entrances may also provide opportunities to welcome a customer and should be as inviting and appealing as the main entry. Shoppers learn everything about a store from the storefront windows. Display windows act as the store's billboard. A positive tone should be set by the windows. Great window displays will help lure customers into the store. Corner storefronts are significant opportunities to beckon pedestrians to cross the street and walk past an entirely new block of stores. When display windows are vacant, they project an unsafe image that discourages pedestrians.

WINDOW "HOW-TO'S"

Window displays should grab the attention of the pedestrian to draw them into the store and should include graphic elements that highlight the stores merchandise. Window displays must be rotated occasionally to keep pedestrians interested. Some techniques for window displays include:

- Develop Themes. Displays can follow a theme and integrate props. Themes can include store products or a specific set of related items such as sports equipment, romance items, nature, or patriotism.

- Repetitive Objects. Repeating objects creates a strong message. Objects do not need to be expensive to be a successful display. Simple objects such as cut out hearts, gloves. Lampshades, or balloons can create dynamic displays. Used and repurposed objects such as window frames, doors, or barrels can also be used to reinforce the display.
- Flexible Backdrops. Backdrops 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.
- Allow for Lighting. Lighted window displays add life to the evening streetscape. People leaving nearby businesses with later hours, such as restaurants, theaters, and drinking establishments may be compelled to visit later. However, window lighting should not impose on upper-story residents or create glare on the sidewalks or streets.

Signage and Branding

Business owners must decide upon their brand to help define their store and how they hope to be perceived. This decision will determine the store logo, signage, design, colors, and font types; all of which should coordinate and support the brand. Logos should be used consistently on merchandise, business cards, and advertisements. Bags with logos are walking advertisements that reinforce the store brand.

Interiors

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

- Feature Displays. Once a customer has entered the shop, there should be an open area to allow them to adjust to their surroundings and make decisions. Feature displays should be visible from this area.
- First Fixture. The first fixture should be a display with a specific theme or product, well inside the entrance.

- Music. Music that matches the store brand should be playing. This simple step will bring an empty store to life and helps make customers feel at ease.

- Secondary Displays. These displays encourage customer movement around the store. This is accomplished by placing a variety of minor product 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. The back wall should be interesting and visible from the front of the store. This can be as easy as using paint or unusual fixtures. Place sale or clearance merchandise in the back to encourage customers to walk past other items.

- 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

This Retail Market Analysis Report has identified a range of goals and strategies, based upon an analysis of the demographic and economic trends driving Downtown Webb City's retail market. The implementation of these goals and strategies will be included in the DREAM Downtown Strategic Plan and will include integration with other tasks such as funding sources, marketing assistance, and design concepts. Key steps for achieving the goals in this Retail Market Analysis include:

- Implement other key DREAM recommendations, such as those found in the Building and Streetscape Design Concepts and Financial Assistance Review. The recommendations found in these reports are critical to lay the foundation for the retail recommendations in this analysis.
- As of the writing of this report, Downtown Webb City has a number of vacancies and a significant amount of unmet demand. Owners of the existing vacant spaces will need to be competitive and may need to improve building conditions to fill their spaces. The Chamber should focus on raising the visibility of Webb City within the region.
- A potentially large impact could be obtained if the City can identify an innovative developer to redevelop the three industrial properties noted into retail, restaurant, or mixed-use space with upper-floor housing units. These projects will increase the commercial and residential markets in Downtown Webb City and generate significant activity.
- On the heels of residential development, should come an increase to the already high demand for restaurant uses.
- As vacant space decreases, the City should encourage non-retail uses to relocate to side streets or upper-floors; preserving prime, 1st-floor locations for retail and restaurant uses.
- The City should monitor the ratio of industrial space to commercial space and consider zoning actions to adjust these uses over time.
- The Chamber should encourage Downtown businesses to offer higher-quality goods. The current retail and restaurant sales-per-square foot amount is very low. Downtown can generate more income for the City if the overall quality of goods and meal tickets can be improved.
- Downtown should consider a funding mechanism such as a Community Improvement District (CID) to fund a Downtown organization and provide a stable funding source for Downtown improvements and programs.

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APPENDIX

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Appendix A-1
Downtown Webb City

Retail Market Analysis
City of Webb City, Missouri

Legend

DREAM Boundary

0 300 600 1,200
Feet

N

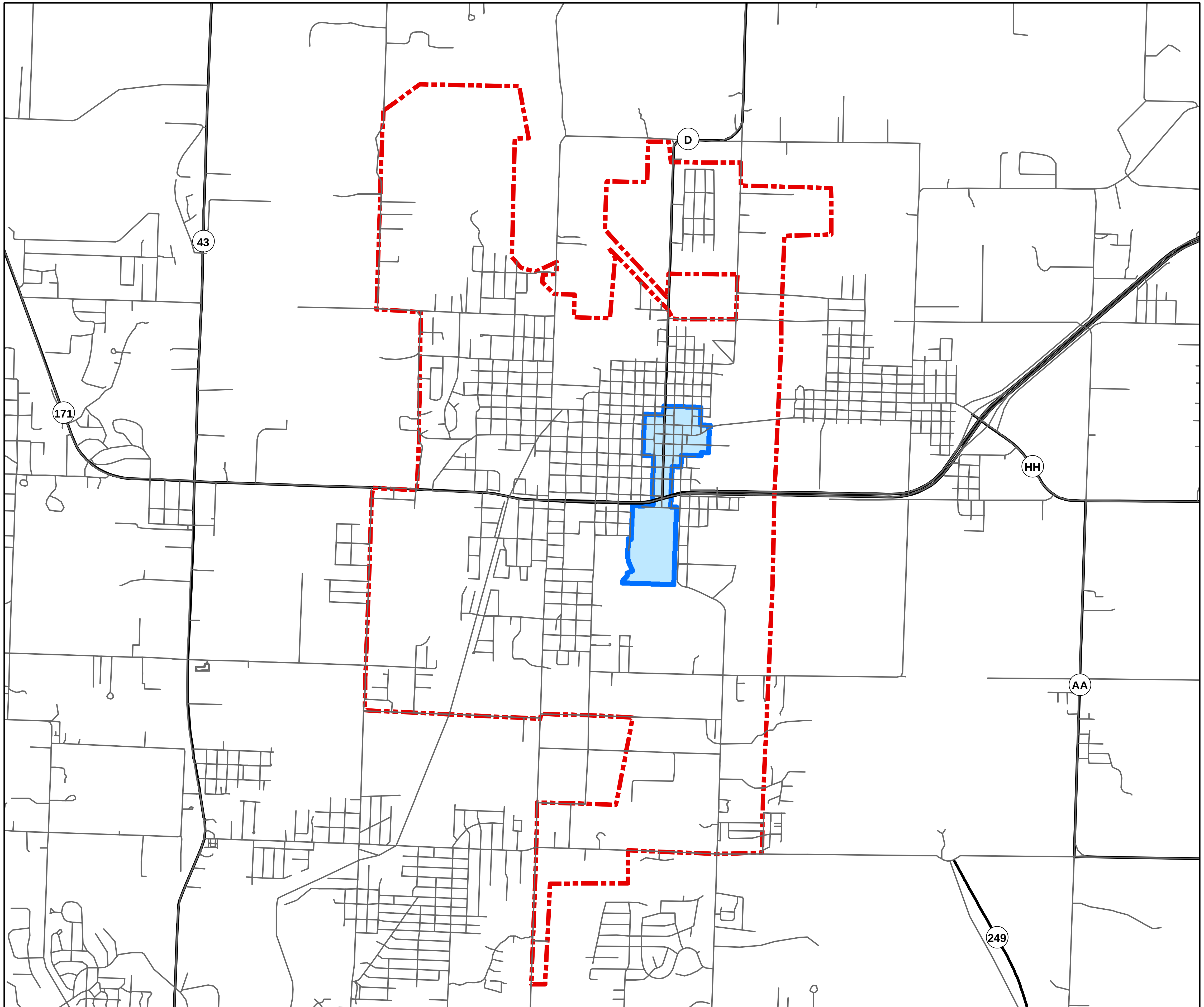
May 2015

D·R·E·A·M INITIATIVE

PGAV PLANNERS

Appendix A-2
Primary Trade Area

Retail Market Analysis
City of Webb City, Missouri



Legend

DREAM Boundary
Primary Trade Area

0 1,500 3,000 6,000
Feet

N

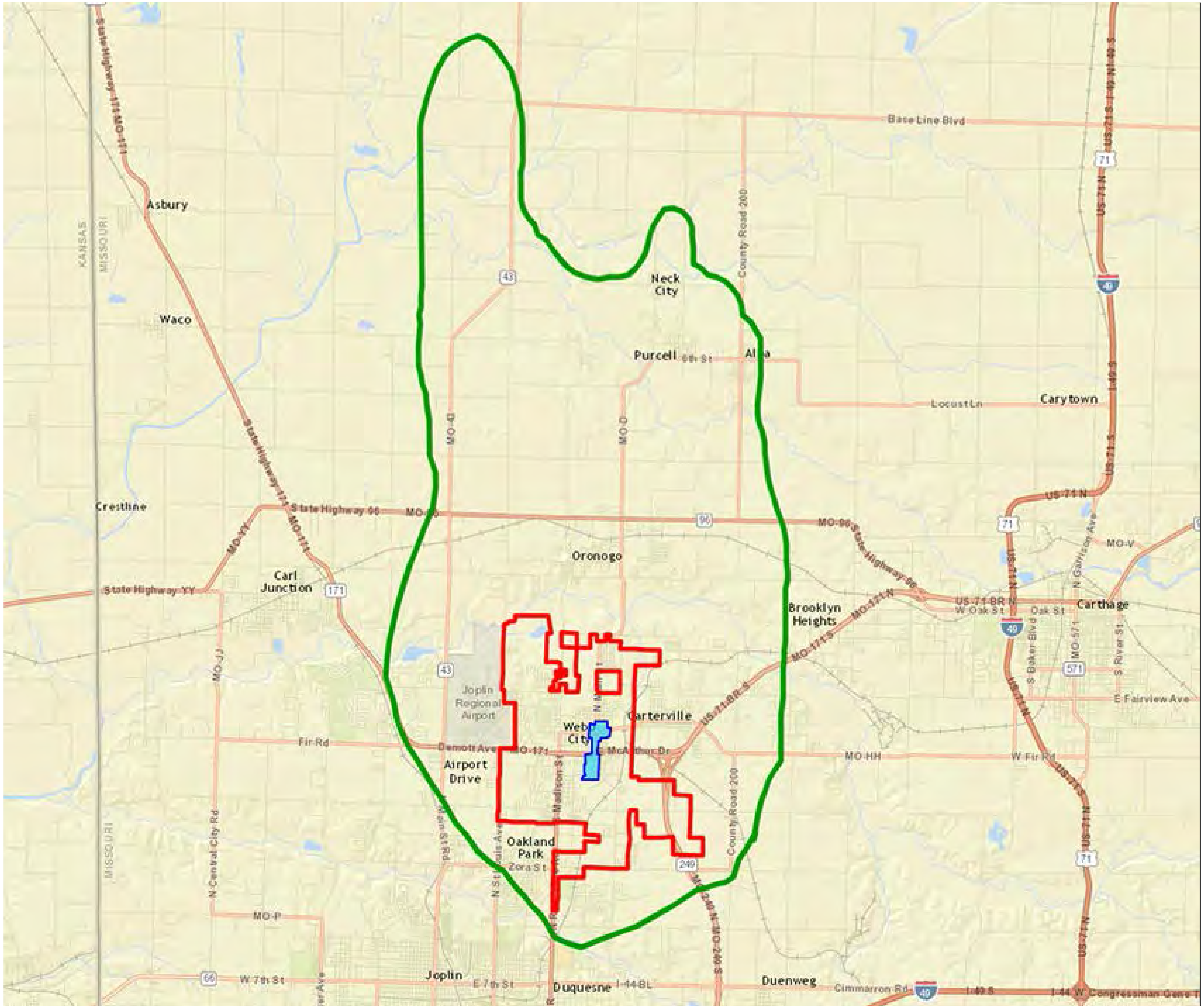
May 2015

D·R·E·A·M
INITIATIVE

PGAV PLANNERS

Appendix A-3
Secondary Trade Area

Retail Market Analysis
City of Webb City, Missouri



Legend

- DREAM Boundary
- Primary Trade Area
- Secondary Trade Area

May 2015

D·R·E·A·M INITIATIVE

PGAV PLANNERS

Appendix B

Downtown Webb City DREAM Study Area
Retail Demand & Sales [1]

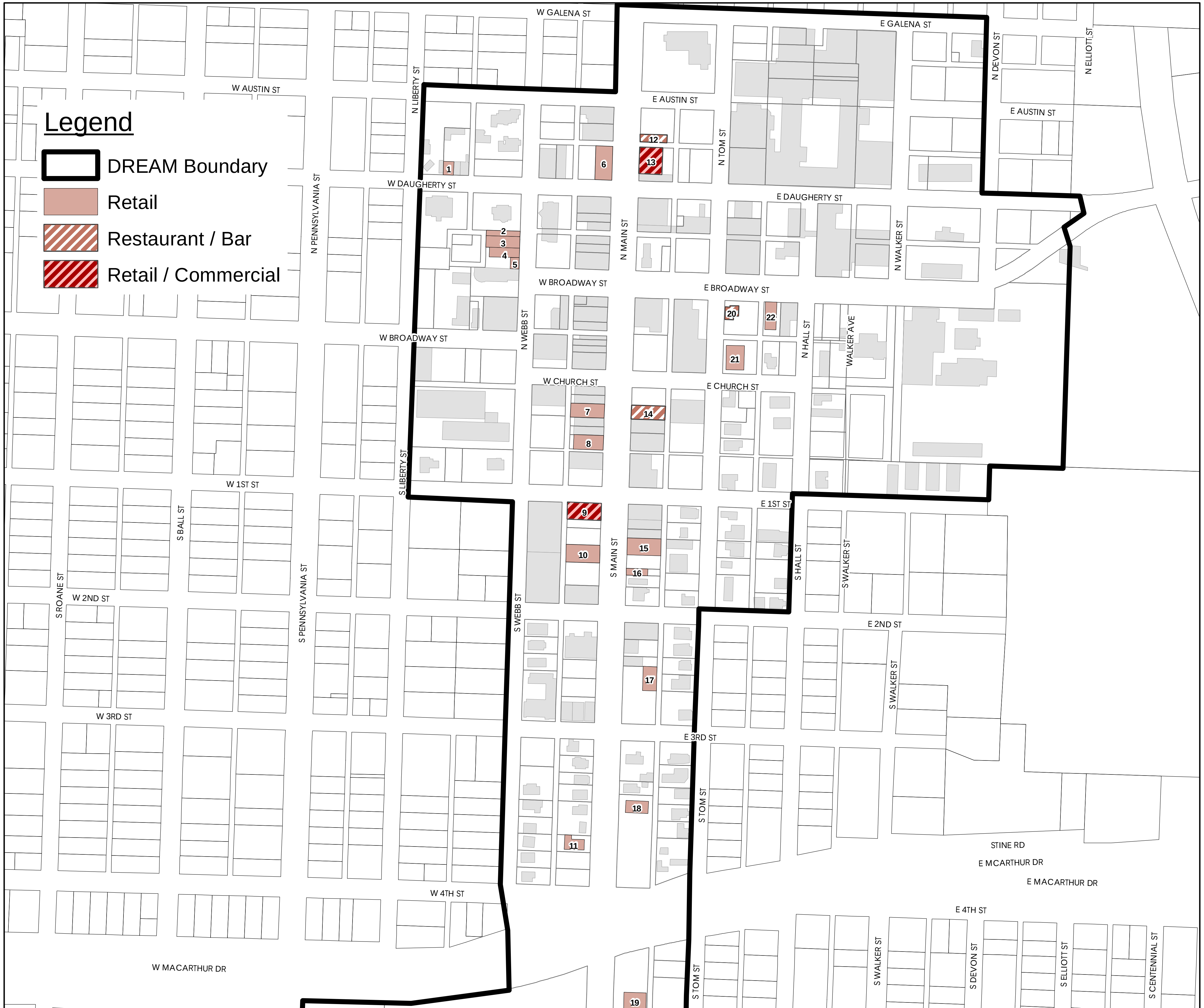
Industry Group	Secondary Trade Area Demand	STA Businesses	STA Total Retail Sales	STA Gap	Potential Square Footage	STA Per Capita Demand	City Retail Demand	City Businesses	City Total Retail Sales	Downtown Total Retail Sales [2]	Downtown Businesses [2]	Downtown Trade Area Capture	Downtown Pull-factor
Total Retail Trade and Food & Drink (NAICS 44-45, 722) [2]	**$134,118,815**	**125**	**$165,722,195**	**$ (31,603,380)**	**(842,730)**	**4,434**	**$48,571,801**	**72**	**$138,359,836**	**$927,555**	**7**	**209**	**0.53**
Total Retail Trade (NAICS 44-45)	**$109,231,933**	**93**	**$153,663,702**	**$ (44,431,769)**	**(888,635)**	**3,611**	**$39,629,524**	**46**	**$119,630,252**	**$608,134**	**5**	**168**	**0.42**
Total Food & Drink (NAICS 722)	**$24,886,882**	**31**	**$22,591,627**	**$ 2,295,255**	**45,905**	**823**	**$8,942,277**	**26**	**$18,729,584**	**$319,421**	**-1**	**388**	**0.98**
Furniture & Home Furnishings Stores (NAICS 442)	$4,816,441	7	$3,141,653	$ 1,674,788	33,496	159	$1,738,197	2	$1,420,052	$0	0	0	0.00
Furniture Stores (NAICS 4421)	$2,737,691	6	$3,101,875	$ (364,184)	(7,284)	91	$985,720	2	$1,420,052	$0	0	0	0.00
Home Furnishings Stores (NAICS 4422)	$2,078,750	1	$39,777	$ 2,038,973	40,779	69	$752,477	0	$0	$0	0	0	0.00
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$6,243,352	5	$776,015	$ 5,467,337	109,347	206	$2,253,139	4	$349,429	$0	0	0	0.00
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$7,777,423	8	$6,034,337	$ 1,743,086	34,862	257	$2,760,923	4	$1,352,781	$42,004	1	163	0.41
Building Material and Supplies Dealers (NAICS 4441)	$6,265,550	6	$3,118,112	$ 3,147,438	62,949	207	$2,204,072	4	$1,352,781	$42,004	1	203	0.51
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$1,511,874	2	$2,916,226	$ (1,404,352)	(28,087)	50	$556,851	0	$0	$0	0	0	0.00
Specialty Food Stores (NAICS 4452)	$630,795	6	$600,577	$ 30,218	604	21	$231,224	5	$510,243	$0	0	0	0.00
Beer, Wine, and Liquor Stores (NAICS 4453)	$1,174,761	3	$2,139,375	$ (964,614)	(19,292)	39	$421,142	3	$2,079,729	$0	0	0	0.00
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$18,392,283	8	$27,566,375	$ (9,174,092)	(183,482)	608	$6,676,221	7	$22,672,546	$91,237	1	150	0.38
Clothing and Clothing Accessories Stores (NAICS 448)	$12,678,200	6	$26,966,657	$ (14,288,457)	(285,769)	419	$4,595,250	2	$25,900,940	$0	0	0	0.00
Clothing Stores (NAICS 4481)	$8,905,238	6	$26,966,657	$ (18,061,419)	(361,228)	294	$3,243,397	2	$25,900,940	$0	0	0	0.00
Shoe Stores (NAICS 4482)	$1,877,903	0	$0	$ 1,877,903	37,558	62	$686,863	0	$0	$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$1,895,060	0	$0	$ 1,895,060	37,901	63	$664,990	0	$0	$0	0	0	0.00
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$3,595,801	8	$743,623	$ 2,852,178	57,044	119	$1,310,205	1	$116,055	$0	0	0	0.00
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$3,324,501	5	$467,802	$ 2,856,699	57,134	110	$1,210,884	1	$116,055	$0	0	0	0.00
Book, Periodical, and Music Stores (NAICS 4512)	$271,300	3	$275,821	$ (4,521)	(90)	9	$99,321	0	$0	$0	0	0	0.00
General Merchandise Stores (NAICS 452)	$46,986,721	9	$70,036,003	$ (23,049,282)	(460,986)	1,553	$17,125,928	5	$64,093,467	$0	0	0	0.00
Department Stores Excluding Leased Depts. (NAICS 4521)	$16,064,781	5	$5,330,548	$ 10,734,233	214,685	531	$5,819,326	2	$1,377,387	$0	0	0	0.00
Other General Merchandise Stores (NAICS 4529)	$30,921,940	4	$64,705,455	$ (33,783,515)	(675,670)	1,022	$11,306,602	3	$62,716,080	$0	0	0	0.00
Miscellaneous Store Retailers (NAICS 453)	$6,936,155	32	$5,125,954	$ 1,810,201	36,204	229	$2,517,295	13	$1,135,010	$248,841	4	1,085	2.73
Florists (NAICS 4531)	$255,841	1	$71,292	$ 184,549	3,691	8	$92,954	0	$0	$0	0	0	0.00
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$2,061,793	5	$237,631	$ 1,824,162	36,483	68	$735,777	2	$118,609	$50,767	1	745	1.87
Used Merchandise Stores (NAICS 4533)	$413,024	8	$1,135,052	$ (722,028)	(14,441)	14	$149,446	4	$295,466	$108,772	2	7,966	20.02
Other Miscellaneous Store Retailers (NAICS 4539)	$4,205,497	18	$3,681,980	$ 523,517	10,470	139	$1,539,118	7	$720,935	$89,303	2	642	1.61
Food Services & Drinking Places (NAICS 722)	$24,886,882	31	$22,591,627	$ 2,295,255	45,905	823	$8,942,277	26	$18,729,584	$319,421	2	388	0.98
Full-Service Restaurants (NAICS 7221)	$9,279,268	8	$5,246,414	$ 4,032,854	80,657	307	$3,333,783	6	$3,122,160	$0	0	0	0.00
Limited-Service Eating Places (NAICS 7222)	$12,230,826	19	$16,331,979	$ (4,101,153)	(82,023)	404	$4,379,454	17	$14,996,128	$102,929	1	255	0.64
Special Food Services (NAICS 7223)	$1,123,123	1	$395,759	$ 727,364	14,547	37	$413,297	0	$0	$0	0	0	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	$2,253,666	3	$617,475	$ 1,636,191	32,724	75	$815,743	3	$611,296	$216,493	1	2,906	7.30

[1] Sales data is provided as an estimate from ESRI Business Analyst Online and is not actual sales reported to the State or City

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

Appendix C-1
Retail Locations

Retail Market Analysis
City of Webb City, Missouri



ID	Commercial Location
1	Military Collectors Services
2	Art Gallery
3-5	American Furniture Classics
6	Bruner Pharmacy
7	Route 66 Movie Theater
8	Outdoor Addicts Outfitters
9	Cool School Shoppe
10	Trader's Gun & Pawn
11	Vans Vans and More
12	Thai Spice
13	The Hand Up Store
14	Norma's Kitchen
15	PC ER
16	Claw Paws Pet Spa
17	Cigs & Suds
18	Casey's General Store
19	Take A Break
20	Longhorn Bar
21	Embasy Logowear & Promotional Products
22	Beaver Dam

0 150 300 600
Feet

N

May 2015

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PGAV PLANNERS

Appendix D
Building Vacancies

Retail Market Analysis
City of Webb City, Missouri

ID	Address	Available Sq.Ft.
1	221 W. Daugherty Street	850
2	221 W. Daugherty Street	450
3	217 W. Daugherty Street A	500
4	217 W. Daugherty Street B	600
5	113-115 W. Daugherty Street	3,500
6	111 W. Daugherty Street	2,300
7	216 N. Main Street	3,550
8	208-210 N. Main Street	3,600
9	112 N. Main Street	2,000
10	4 S. Main Street	3,600
11	10 S. Main Street	750
12	10 1/2 S. Main Street	1,450
13	12 S. Main Street	1,600
14	18 S. Main Street	2,000
15	20-22 S. Main Street	3,700
16	34 S. Main Street	4,000
17	110 W. First Street (Industrial)	12,000
18	110 W. First Street (Industrial)	12,000
19	103 N. Main Street	1,050
20	201 N. Main Street	1,750
21	124 East Broadway (Industrial)	14,400
22	25 S. Main Street	3,300
23	27-29 S. Main Street	4,250
24	101 S. Main Street	3,550
25	101 S. Main Street	2,300
26	202 E. Daugherty Street	2,100

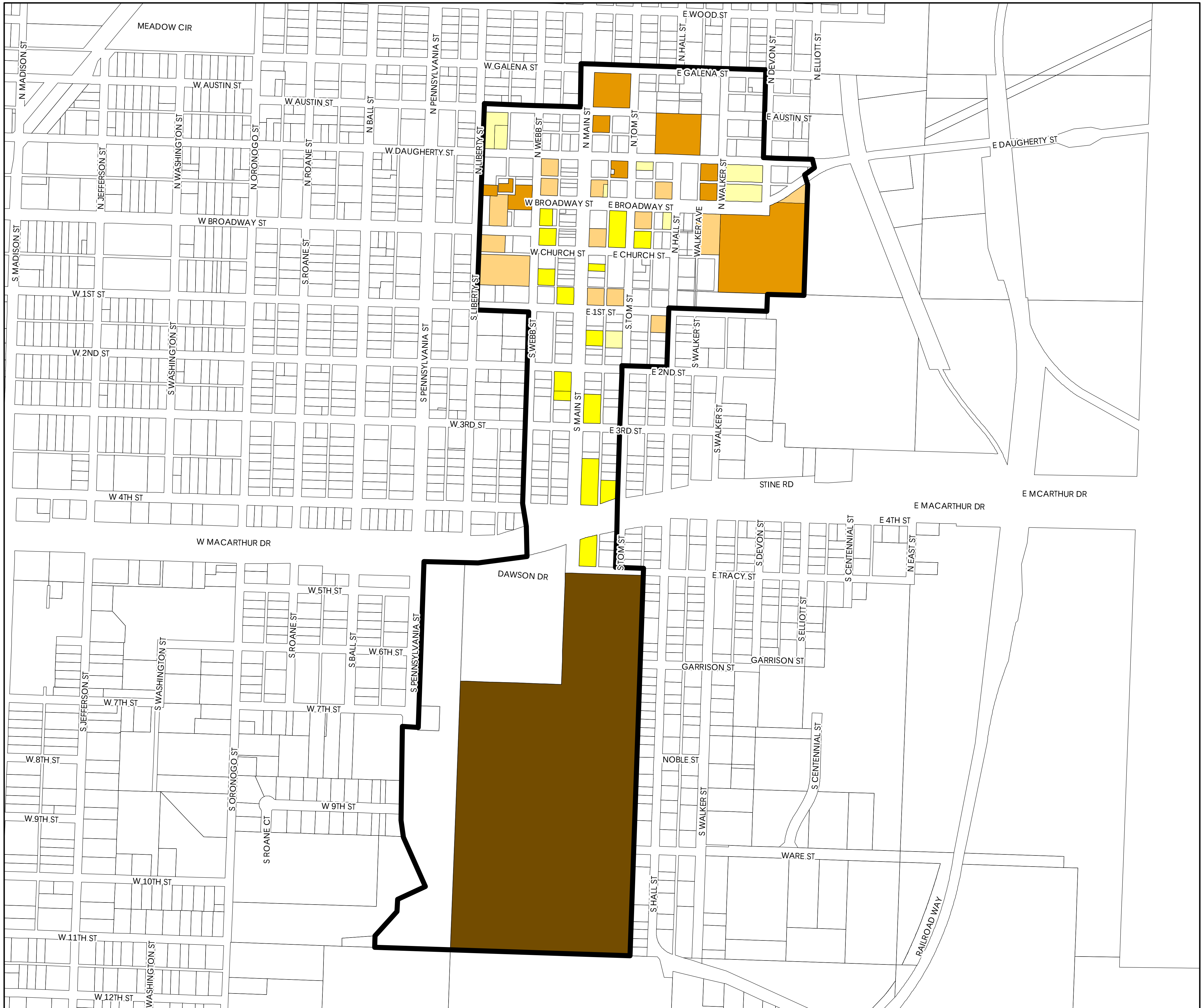
0 100 200 400
Feet

N

May 2015

D·R·E·A·M INITIATIVE

PGAV PLANNERS



Appendix E
Off Street Parking

Retail Market Analysis
City of Webb City, Missouri

Legend

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

0 300 600 1,200
Feet

N

May 2015

Existing Store Checklist

Exterior

Storefront:

- Check Overall Condition, are repairs needed?

☐ Yes

☐ No

☐ Renovation/Remodel Preferred

Description

- Is new paint needed?

☐ Yes

☐ No

- Does the paint match the store brand/logo?

☐ Yes

☐ No

Description

- Is the storefront generally clean?

☐ Yes

☐ No

Description

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

☐ Yes

☐ No

Existing Store Checklist

Storefront:

- Are there hazards in front of the storefront?

☐ Yes

☐ No

Description

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- Is the sidewalk clean and level?

☐ Yes

☐ No

Description

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Exterior Signage:

- Does signage occur at eye level (Pedestrian)?

☐ Yes

☐ No

Description

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- Does signage occur at car level (Driver)?

☐ Yes

☐ No

Description

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Existing Store Checklist

Exterior Signage:

- Do wall signs obstruct the architecture?

☐ Yes
☐ No
Description

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- Is signage maintained in good condition?

☐ Yes
☐ No
Description

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- Does the signage complement the building and area?

☐ Yes
☐ No
Description

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- Are the exterior signs lighted (at night)?

☐ Yes
☐ No
Description

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Existing Store Checklist

Display Windows:

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

Description

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- Are window displays rotated every 4-6 weeks?

☐ Yes

☐ No

- Do the displays effectively represent the store brand?

☐ Yes

☐ No

- Are displays including the best/most poplar products?

☐ Yes

☐ No

Description

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

☐ Yes

☐ No

Description

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- Are the window displays lit at night?

☐ Yes

☐ No

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Existing Store Checklist

Interior

Flooring:

- Is the floor worn/hazardous/slippery?

☐ Yes
☐ No

- Is the floor clean?

☐ Yes
☐ No

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

☐ Yes
☐ No

- Is there a walk off area to clean shoes?

☐ Yes
☐ No

Description

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Ceiling:

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

☐ Yes
☐ No

Description

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- Is the HVAC duct work clean?

☐ Yes
☐ No

Existing Store Checklist

Ceiling:

- Are there any other distracting issues?

Description

Lighting:

- Is the lighting adequate to show the merchandise?

☐ Yes

☐ No

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

☐ Yes

☐ No

- Are the bulbs the same type?

☐ Yes

☐ No

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

☐ Yes

☐ No

Description

- Are there adjustable lights to create focal points?

☐ Yes

☐ No

Description

Existing Store Checklist

Interior Colors:

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

☐ Yes

☐ No

Description

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

☐ Yes

☐ No

Description

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- Are the paint colors consistent from fixture to fixture?

☐ Yes

☐ No

Description

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Circulation:

- Does the foot traffic flow smoothly?

☐ Yes

☐ No

Description

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Existing Store Checklist

Circulation:

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

  Description

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Cash Wrap/Register:

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

Existing Store Checklist

Cash Wrap/Register:

- Are the views of the shop and exits open enough for security?
  - ☐ Yes
  - ☐ No
- Is there fixture nearby for impulse purchases?
  - ☐ Yes
  - ☐ No

  Description

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Fixtures & Equipment:

- Does the fixture style match the brand or logo?
  - ☐ Yes
  - ☐ No
- Is there a range of heights and sizes to keep the eye moving?
  - ☐ Yes
  - ☐ No
- Is the un-shoppable high area (72") used for display?
  - ☐ Yes
  - ☐ No
- Is the un-shoppable low area (18") un-stocked and/or used for storage?
  - ☐ Yes
  - ☐ No

  Description

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Merchandising:

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

Existing Store Checklist

Merchandising:

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

  ☐ Yes

  ☐ No

- Does the product inventory match the internet site?

  ☐ Yes

  ☐ No

  Description

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

  ☐ Yes

  ☐ No

  Description

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Cleanliness:

- Is the store clean?

  ☐ Yes

  ☐ No

  Description

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- Are boxes cleared and out of sight?

  ☐ Yes

  ☐ No

- Are the views into off limits areas blocked?

  ☐ Yes

  ☐ No

Existing Store Checklist

Cleanliness:

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

  Description

Comfort:

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

Dressing Rooms:

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

Existing Store Checklist

Dressing Rooms:

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

Staff:

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

  Description

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

  Description

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

  Description

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Other Comments.

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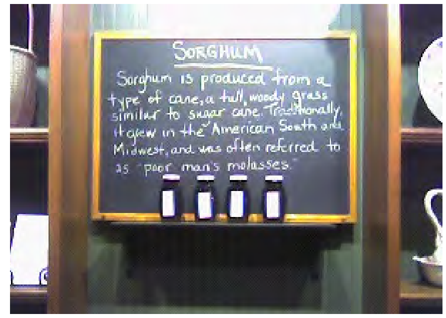

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