

Jackson, Missouri

DOWNTOWN
REVITALIZATION &
ECONOMIC
ASSISTANCE FOR
MISSOURI

RETAIL MARKET ANALYSIS



APRIL 2015

PGAV PLANNERS

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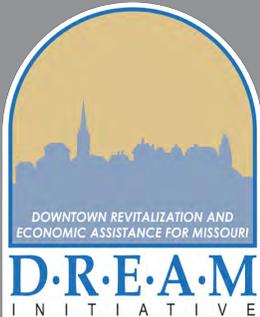
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EXECUTIVE SUMMARY

The City of Jackson is the County Seat of Cape Girardeau County, Missouri and is located just west of Interstate 55 in Southeast Missouri; about 110 miles south of St. Louis. The area around the Cape Girardeau County Courthouse is elevated and is known traditionally as Uptown, rather than Downtown, Jackson.

The City was founded in 1814 and was the first community to bear the name of President Andrew Jackson. The settlement began on elevated land between Hubble and Goose creeks. The site was selected to serve as the permanent seat of justice for the Cape Girardeau District. The City was officially laid out in 1815. In 1818 the community of 300 saw the establishment of a federal land office and the first county courthouse. Growth occurred throughout the 1800's, primarily due to agriculture. By 1884, the population of Jackson had grown to 2,100. The current courthouse was constructed in 1906. Today the City is home to nearly 14,000 people living in over 5,600 households. Uptown Jackson primarily competes for retail business with Cape Girardeau, the Internet, and other retail facilities within the City of Jackson, but located closer to the Interstate 55 corridor.

This Retail Market Analysis reveals that Uptown could see an increase in sales if Uptown businesses can absorb some unmet retail demand. These projections are based on sales volumes, vacant floor space, and estimated leakage of retail dollars being spent outside of Uptown and the city limits. This report should be considered a "snapshot" in time. The data used within this report was developed during the DREAM planning process and elements such as businesses, vacancies, and square footage was subsequently updated in the Spring of 2015.

The Retail Market Analysis was conducted by analyzing data for three areas: Uptown Jackson (Uptown) 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 modified 20 minute drive-time from Uptown. The existing retail market, demographics, and DREAM surveys were also analyzed to help define a strategy that takes into account public preferences to strengthen the retail market in Uptown Jackson.

A review of market conditions provides an idea of the possible new and existing business potential for Uptown Jackson. The DREAM Land Use, Building, and Infrastructure Survey revealed about 335,070 square feet of existing 1st-floor commercial space. **It is significant to note that about 82% of the total available space in Uptown Jackson is a non-retail/non-restaurant use.** The City should

monitor incoming Uptown uses and may wish to consider adjusting its zoning code to reduce this imbalance between retail and non-retail uses over time.

Overall, significant non-residential uses in Uptown Jackson include:

- 130,216 square feet of public/institutional space (fully occupied)
- 10,658 square feet of restaurant space (fully occupied)
- 49,022 square feet of retail space (6,975 square feet vacant)
- 85,668 square feet of office/service space (4,150 square feet vacant)
- 3,940 square feet of mixed-use space (fully occupied)

The retail/restaurant space is generating about \$4.36 million in annual sales (sales do not include auto dealers and related items, gasoline stations, or non-store retailers). **About 40% of the total Uptown sales is due to two businesses coded as "health & personal care store."** The retail component (removing any square footage for auto dealers and related items, gasoline stations, or non-store retailers) is generating \$3.47 million or about \$108.56 per occupied square foot. The restaurant component is generating about \$892,000 or about \$83.68 per occupied square foot. With these averages, the 11,125 square feet of current vacancy that could easily be used for retail or restaurant use, represents an additional \$925,000 to \$1.2 million in potential annual sales.

The primary opportunity for retail development in Uptown Jackson is for the City to attract new users of existing vacant space. However, other opportunities include developing more retail space, identifying a brand to attract regional consumers and visitors, and developing higher-quality products to increase the sales per square foot in Uptown; particularly regarding existing restaurants. There are some underutilized and/or vacant lots where the City could encourage new infill mixed-use development with retail on the ground floor. Additionally, the City should consider encouraging offices and service-oriented uses to locate, or relocate, to upper-floor spaces or along side streets. This activity will preserve prime, first-floor vacancies for retail use.

The retail analysis demonstrates that most retail sectors are not adequately served locally within the STA. This significant amount of unmet retail demand indicates that shoppers are leaving the STA to meet their retail needs beyond Jackson, primarily in Cape Girardeau, Missouri, as well as on the Internet. Such unmet retail demand presents an opportunity for Uptown Jackson 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. These regional attractions are primarily located in Cape

Girardeau and include Southeast Missouri State University (SEMO), the Mississippi Riverfront, Downtown Cape Girardeau shops, and the Isle of Capri Casino.

Table 16 on Page 27 lists the retail areas for potential growth in Uptown Jackson. The retail goods and services are classified according to the North American Industry Classification System (NAICS) in industry groups. The categories of Grocery Stores and Department Stores have been removed because those uses do not typically seek a location in a downtown environment. However, the unmet demand shown in these categories is worth noting as existing Uptown Jackson merchants may wish to add grocery items or general department store goods to their product lines.

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

- Health & Personal Care Stores: \$16.7 million
- Full-Service Restaurants: \$10.1 million
- Clothing Stores: \$8.5 million
- Limited-Service Eating Places: \$5.9 million
- Electronics & Appliance Stores: \$5.0 million
- Sporting Goods/Hobby/Musical Instrument Stores: \$3.2 million

The total demonstrated unmet demand for retail goods and services, removing Grocery and Department Stores, shows that over \$69 million dollars in additional sales for Uptown Jackson could be generated if vacant space was available. However, this amount of demand would require 690,000 square feet of space based upon the figures of \$108.56 per retail square foot and \$83.68 per restaurant square foot. This is not a likely scenario, but these figures, coupled with the already low vacancy rate in Uptown, indicate that the City of Jackson could develop new retail/restaurant space. Uptown should be considered as a location for such development.

Although infill construction and relocation of office and service businesses to upper-floors and side streets should be pursued, the City should also pursue strategies to strengthen existing businesses and improve the quality, and likely cost, of goods sold in Uptown to increase sales per square foot numbers. This is particularly important to increase the low sales per square foot of restaurant uses.

Recommendations for improving the draw of Uptown Jackson are intertwined with the overall brand of the City of Jackson. The City needs to differentiate itself within the Cape Girardeau market by identifying and reinforcing a niche market. Uptown can then attract and develop promotions to serve Jackson visitors in that market.

Another significant component that could be improved in Uptown Jackson is not a retail market aspect. There are few residents located in Uptown. The DREAM Residential Analysis indicates that there is a home ownership residential market surrounding Uptown, but the 2010 Census shows just over 1% of the population of Jackson live in Uptown. Additionally, the residential report focuses on the primary age segment that is growing in the Jackson area; residents age 55 and up. The City should encourage new development to include multi-story, mixed-use buildings with residential units for this market. By developing the Uptown residential market, all categories of retail and restaurant businesses will improve due to the proximity of potential customers.

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 Uptown Jackson businesses as they seek to improve their sales.

INTRODUCTION

Uptown Jackson, Missouri has a typical grid-pattern street layout with the primary access from Interstate 55 provided by State Highway 61 from the north, East Main Street from the east, and State Highway 25 from the south. State Highway 61 traverses Uptown along Hope, East Washington, and North High Streets and carries a significant amount of traffic through the area. There is a traditional courthouse square setting, bounded by Main, Court, Barton, and Washington Streets. However, most of the Uptown commercial core is located on the south and west sides of the square. With the exception of a historic home, new construction occupies the north and east sides of the square. Other commercial areas stretch south from the square along S. High Street, west of the square along W. Main Street, and along S. Hope Street/Highway 61 to the south of the square.

There are several governmental offices in Uptown Jackson. City Hall is located at the intersection of Main and Court Streets; across from the Courthouse. The Jackson Chamber of Commerce is located at the intersection of Main and Hope Streets. Uptown Jackson has a few large churches, schools, banks, and other uses that are located on large lots primarily used for parking. This has resulted in a very open feeling just beyond the core commercial areas. The City has recently improved a section of South High Street with streetscape features and has plans to upgrade water service in Uptown. The City is also partnering with the Missouri Department of Transportation regarding a major construction project along S. Hope Street/Highway 61 in Uptown that includes a roundabout at the Main Street and S. Hope Street/Highway 61 intersection.

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 further away from the community's commercial core. The automobile increased the mobility of the consumer, and shopping centers increasingly located in developments along major roadways. Uptown Jackson has maintained some important civic and social service functions, making it a destination for residents. In order for Uptown to realize its potential as a retail area, it must appeal to businesses and attract an expanded retail market. DREAM seeks to increase the retail draw and relevance of Uptown Jackson to the City as a whole. Through the establishment of clear goals, strategies and steps for implementation, Uptown has an opportunity to build upon its positive aspects and recent projects with sound planning strategies that seek to enhance the retail and restaurant market.

BACKGROUND & METHODOLOGY

This report provides an approach to quantify the retail demand and supply for the trade areas in order to identify potential retail services that would be successful in Uptown. Recommendations have been developed regarding strategies to encourage appropriate retail development in Uptown Jackson. 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) recommendations of retail development strategies and implementation techniques to achieve goals.

As a component of other Jackson DREAM Initiative activities, discussions were held, or surveys conducted, with residents, Uptown business owners and stakeholders, City officials and staff, high school students, and visitors. These various market segments each provide key insights into potential improvements to Uptown Jackson's retail services. Additionally, a review of future residential demand for the trade area has been conducted in the Jackson DREAM Residential Demand Analysis from November of 2014. A physical examination of the trade areas and surrounding region provides insight into traffic and pedestrian trends and helps to identify the business mix and Uptown occupancy patterns.

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

LIMITS OF STUDY

The Retail Market Analysis is intended to provide a general forecast of the amount and types of retail development that could be supported in the trade area. The assumptions and projections used in the analysis are current and supported through the year 2019. The analysis is meant to provide general strategic direction for developing retail in Uptown Jackson. This study is not intended to be the sole basis for development decisions.

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 a car dealership or specialty electronics retailer’s trade area 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: a downtown trade area, a Primary Trade Area (PTA) and a Secondary Trade Area (STA). For the purposes of this study, the downtown Trade Area is Uptown Jackson (Uptown), the PTA is the Jackson city limits, and the STA generally includes any point within a 20-minute drive of Uptown; However, the STA is modified to reflect the proximity of Jackson to the major retail shopping available in Cape Girardeau. Therefore, the STA represents an acceptable catch-basin of consumers likely to make a shopping trip to Uptown, rather than to another community. A map of each area is included in Appendix A and the three areas are summarized below.

- ◆ Uptown Jackson (Uptown): The focus of the analysis is to determine the current retail activity captured by Uptown and the amount of additional retail activity that might be supported. Uptown Jackson is defined as the DREAM Study Boundary.
- ◆ Primary Trade Area (PTA): This study classifies the boundary of the City of Jackson as the PTA. Not only does Uptown draw the majority of its shoppers from the PTA, but it is useful to show the relationship between Uptown retail activity and citywide retail activity.
- ◆ Secondary Trade Area (STA): For the STA, the study uses a modified 20-minute drive-time to Uptown. Most consumers in this area are likely to travel to the PTA to shop and may be shopping in Uptown. Retail recommendations will focus on how Uptown 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 Uptown, 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, Uptown 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 Jackson. For purposes of comparison, the demographic tables in this report use current 2014 estimates and 2019 projections as provided by a third-party supplier and based on U.S. Census data.

Table 1, below, indicates Uptown has a very small population and lower median household income than the PTA, STA, and the State of Missouri. The average people per occupied household is 2.5 to 2.6 in the PTA, STA, and State, but is estimated to drop to 1.8 for Uptown Jackson. The median age in Uptown is significantly younger than the PTA, STA, and the State of Missouri.

TABLE 1: 2014 DEMOGRAPHIC SNAPSHOT

	Uptown Jackson	PTA	STA	State of Missouri
Population	148	14,156	29,821	6,074,504
Median Household Income	\$40,220	\$44,426	\$48,836	\$45,900
Housing Units	104	6,037	12,386	2,837,856
Owner Occupied	52	3,902	8,936	1,684,203
Renter Occupied	31	1,785	2,634	788,528
Vacant Units	21	350	816	365,125
Median Age	34.0	37.6	39.8	39.0
19 and Under	43	3,878	7,880	1,564,976
20-44	57	4,587	9,152	1,972,679
45 and Over	49	5,693	12,791	2,657,493

MARKET PROFILE/DEMOGRAPHIC TRENDS

UPTOWN JACKSON (UPTOWN)

Uptown (the area within the DREAM boundary) is roughly 55 acres and consists of about 161 primary buildings on 22 city blocks (see Figure 1).

The 2010 Census showed only 143 people lived Uptown in 80 occupied housing units, for an average of about 1.8 persons per occupied unit. The median age was 32.5, with about 29% of the population being age 19 or younger, 39% between 20 and 44 years of age, and 30% age 45 years or more.

Figure 1: Uptown Jackson



The 2014 estimate for the population and number of housing units in Uptown have increased and this trend is expected to continue. The median age is expected to increase slightly and the age cohort of 20-44 years of age is estimated to be the slowest growing cohort for Uptown. The 45 and over age cohort saw a significant increase from 2010 to 2014.

The following table illustrates current demographics and future demographic trends for Uptown.

TABLE 2: UPTOWN JACKSON

	2010	2014	2019	% Change '10-'14	% Change '14-'19
Population	143	148	155	3.5%	4.7%
Housing Units	100	104	109	4.0%	4.8%
Owner Occupied	50	52	54	4.0%	3.8%
Renter Occupied	30	31	33	3.3%	6.5%
Vacant Units	20	21	23	5.0%	9.5%
Median Age	32.5	34.0	34.0	4.6%	0.0%
19 and Under	42	43	45	2.4%	4.7%
20-44	56	57	57	1.8%	0.0%
45 and Over	43	49	51	14.0%	4.1%

PRIMARY TRADE AREA (PTA)

The 2010 Census showed 13,758 people lived in the PTA (defined as the City limits of Jackson, as depicted in Figure 2) in 5,496 occupied housing units for an average of 2.5 persons per occupied unit. The median age was 37.2 with about 28% of the population age 19 or younger, 32% between 20 and 44 years of age, and 40% age 45 years or more.

Table 3 shows that the 2014 population estimate of the PTA has grown moderately and this growth trend is expected to continue. The table also shows growth in the number of housing units with the number of vacant units declining. The median age is expected to increase slightly; with the youngest cohort of 19 years and under growing the slowest.

The following table illustrates current demographics and future demographic trends for the PTA.

Figure 2: Primary Trade Area

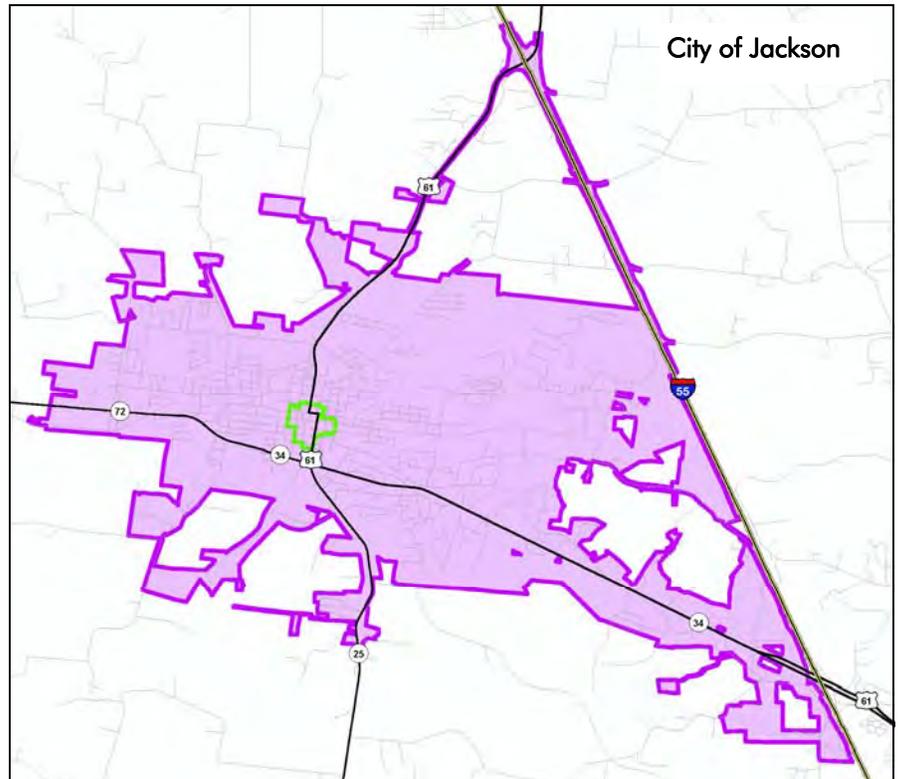


TABLE 3: PRIMARY TRADE AREA

	2010	2014	2019	% Change '10-'14	% Change '10-'19
Population	13,758	14,156	14,670	2.9%	3.6%
Housing Units	5,835	6,037	6,232	3.5%	3.2%
Owner Occupied	3,741	3,902	4,084	4.3%	4.7%
Renter Occupied	1,755	1,785	1,822	1.7%	2.1%
Vacant Units	339	350	326	3.2%	-6.9%
Median Age	37.2	37.6	37.9	1.1%	0.8%
19 and Under	3,841	3,878	4,044	1.0%	4.3%
20-44	4,424	4,587	4,654	3.7%	1.5%
45 and Over	5,493	5,693	5,970	3.6%	4.9%

SECONDARY TRADE AREA (STA)

The 2010 Census showed 28,833 people lived in the STA (refer to Figure 3) in 11,119 occupied housing units for an average of about 2.6 people per occupied housing unit. The median age was 38.9 with about 28% of the population age 19 or younger, 31% between 20 and 44 years of age, and 42% age 45 years or more.

Table 4 shows that the 2014 population estimate of the STA has grown moderately and that this growth trend is expected to continue. The table also shows growth in the number of housing units with the number of vacant units declining. The median age is expected to increase slightly. Although the youngest cohort of 19 years 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 following table illustrates current demographics and future demographic trends for the STA.

Figure 3: Secondary Trade Area

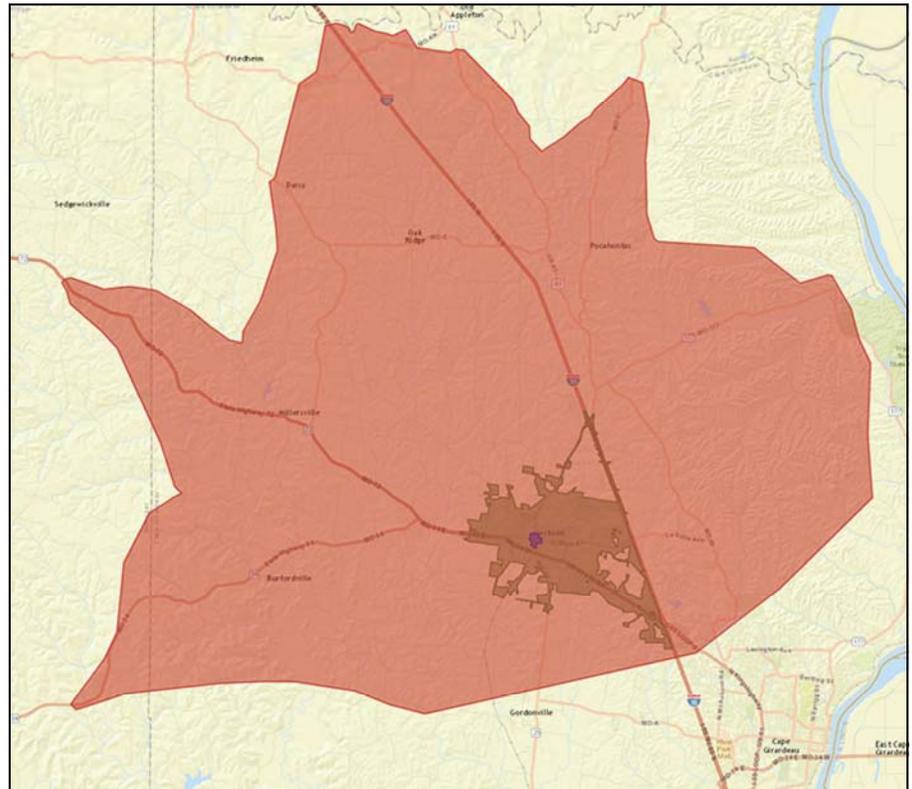


TABLE 4: SECONDARY TRADE AREA

	2010	2014	2019	% Change '10-'14	% Change '14-'19
Population	28,833	29,821	30,932	3.4%	3.7%
Housing Units	11,934	12,386	12,807	3.8%	3.4%
Owner Occupied	8,655	8,936	9,318	3.2%	4.3%
Renter Occupied	2,464	2,634	2,710	6.9%	2.9%
Vacant Units	815	816	779	0.1%	-4.5%
Median Age	38.9	39.8	40.2	2.3%	1.0%
19 and Under	7,982	7,880	8,150	-1.3%	3.4%
20-44	8,848	9,152	9,179	3.4%	0.3%
45 and Over	12,002	12,791	13,602	6.6%	6.3%

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	2014	2019	% Change '10-'14	% Change '10-'19
Population	5,988,927	6,074,504	6,195,148	1.4%	2.0%
Housing Units	2,712,729	2,772,423	2,837,856	2.2%	2.4%
Owner Occupied	1,633,610	1,649,089	1,684,203	0.9%	2.1%
Renter Occupied	742,001	770,812	788,528	3.9%	2.3%
Vacant Units	337,118	352,522	365,125	4.6%	3.6%
Median Age	37.8	38.4	39.0	1.6%	1.6%
19 and Under	1,601,411	1,554,724	1,564,976	-2.9%	0.7%
20-44	1,937,372	1,971,039	1,972,679	1.7%	0.1%
45 and Over	2,450,144	2,548,741	2,657,493	4.0%	4.3%

DEMOGRAPHIC COMPARISON

Table 6, below, provides a comparison of demographic data and shows that Uptown population growth has slightly outpaced the STA and moderately outpaced the PTA and the State. This trend is expected to continue and is a positive sign for the City of Jackson. The table also shows that the population in Uptown is aging faster than the PTA, STA, and State. However, the 2019 estimate is that the aging population in Uptown will stabilize. Overall, these trends indicate people are moving to Jackson, but not necessarily younger people.

TABLE 6: DEMOGRAPHIC COMPARISON

	Population % Change		Median Age Change (in years)	
	10-'14	14-'19	10-'14	14-'19
Uptown	3.5%	4.7%	1.5	0.0
PTA	2.9%	3.6%	0.4	0.3
STA	3.4%	3.7%	0.9	0.4
State	1.4%	2.0%	0.6	0.6

Table 7, below, gives a comparison of age demographic trends. The Uptown population, when compared with the PTA, STA, and State is expected to see growth in the youngest and oldest categories, with the 20-44 age group stagnating. The PTA shows a stronger growth across all age groups. However, the STA is expected to outpace the State rate of growth for the 45 & Over age group. The higher growth rates in the 19 & Under age cohort are likely due to the proximity of the Southeast Missouri University (SEMO) student market and the local public school system.

TABLE 7: TRADE AREA AGE COMPARISON

	19 & Under Change		20-44 Change		45 & Over Change	
	10-'14	14-'19	10-'14	14-'19	10-'14	14-'19
Uptown	2.4%	4.7%	1.8%	0.0%	14.0%	4.1%
PTA	1.0%	4.3%	3.7%	1.5%	3.6%	4.9%
STA	-1.3%	3.4%	3.4%	0.3%	6.6%	6.3%
State	-2.9%	0.7%	1.7%	0.1%	4.0%	4.3%

Table 8, below, provides a projection of the housing units in the trade areas. The table shows that Uptown is expected to outpace the PTA, STA, and State in overall housing units. However Uptown is expected to lag behind the PTA and STA on owner occupied units; favoring renter occupied development.

TABLE 8: TRADE AREA HOUSING UNITS COMPARISON

	Housing Units Change	Owner Occupied Change	Renter Occupied Change
	14-'19	14-'19	14-'19
Uptown	4.8%	3.8%	6.5%
PTA	3.2%	4.7%	2.1%
STA	3.4%	4.3%	2.9%
State	2.4%	2.1%	2.3%

HOUSING MARKET ANALYSIS SUMMARY

For Uptown to have a healthy retail district, it is important that there are residents living within walking distance of Uptown businesses. These residents provide a regular customer base for retailers and give Uptown a 24-hour population. This continuous presence provides life on the sidewalks and keeps a watchful eye on Uptown when businesses are closed. There are a number of residents in and around Uptown Jackson that provide a good consumer base upon which Uptown businesses can draw. The DREAM process conducted a Residential Demand Analysis in November of 2014 that projected residential demand for Jackson, with a focus on Uptown. The analysis concluded that Jackson would benefit from adding more residential units in and around

Uptown and that there may be demand for about 60 rental units and 40 owner-occupied units for the 55+ age segment over the next few years. This age segment is growing in the Jackson area. The analysis points to moderate population growth that is slightly outpacing the overall State of Missouri growth rate. Along with other public and private improvements, this population trend provides an opportunity for Uptown to encourage mixed-use development with upper-floor housing. Other housing types include single-family homes, apartments, and other multi-family options. However, the proximity to Cape Girardeau and the SEMO student market, has limited the demand potential for apartments and multi-family options.

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 Uptown, and creating ideal conditions for extended business hours and additional businesses. Improving the conditions in the Uptown residential market will provide increased marketability for properties, and will encourage better renters and landlords.

CONSUMER SEGMENTS

Specific 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 Uptown Jackson's businesses in the future. The City can address customer needs and implement plans that increase Uptown's ability to provide needed services to these segments. The broad Uptown consumer segments reviewed for Jackson include:

Uptown Employees

- As shown in Table 9 on page 19, Uptown is home to about 562 employees and 82 businesses.
- This segment's impact on the City's retail market can be estimated:
 $562 \times \$10 \text{ weekly} = \text{about } \$292,000 \text{ annually.}$
- This segment has a large demand for restaurants and food services.
- Also has a need for convenience items during work commute.
- This segment often responds to frequent and repeat business promotions.
- Uptown businesses should seek to develop strategies to keep and serve this market in Uptown without the need to drive to other locations.

Uptown Residents

- Only 143 residents live in 80 households in Uptown Jackson, this is a limited market segment 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.

Jackson Residents

- This is a much larger segment than Uptown Residents, with the PTA population of 13,758 shown in the 2010 census and expected to grow to 14,670 in 2019.
- Based on the Web-based Survey discussed in the next section, 33% of residents could be estimated to visit Uptown multiple times in a month.
- 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 Uptown for reasons such as, entertainment, outdoor recreation (walking), shopping, events, dining, conducting business with government offices (County and City), the post office. Other reasons likely include attending church and dropping or picking-up school-aged children.
- Residents are critical for Uptown 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 brand 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 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 segment include effectively developing and marketing the Uptown brand as a unique experience worthy of a visit.

COMMUNITY SURVEYS

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

consumer behavior. These tools help measure the community's desires and preferences for additional retail, restaurant, and entertainment variety.

Focus groups were conducted to gather initial information about Uptown Jackson relative to four general groups: Uptown Property Owners; City Residents; Area High School Students; Business Owners; and Elected and Appointed Officials. Summarized comments regarding retail development included:

- Participants indicated they tend to do everyday shopping in Jackson, primarily at Wal-Mart. However, for specialty items, participants noted they shop in Cape Girardeau.
- The participants in the City Resident's focus group knew that the sales tax was 2% higher in Cape Girardeau, but acknowledged this didn't stop them from shopping there.
- Some focus group participants indicated they shop online or sometimes travel to St. Louis, MO for a wider variety of goods.
- Participants felt Uptown was not moving in the wrong direction, but was moving too slowly in the right direction. They noted a variety of industry in town that helps keep the City stable.
- Participants felt that more dining options, particularly a breakfast restaurant, and entertainment variety for young people was needed.
- Participants felt that some major issues facing Uptown included traffic, parking, and business hours.

Upon completion of the Focus Groups, the DREAM Initiative conducted a Web-based survey, primarily of Jackson residents. Survey findings relevant to Uptown retail development include:

- Just over a third (34%) of respondents answered that they visit Uptown "more than five times a month." Another 31% visit one to five times a month and 29% indicated they visit less than once a month.
- Respondents ranked the reasons that they most often visit Uptown in the following priority:
 1. Entertainment
 2. Outdoor recreation such as walking
 3. Shopping
 4. Special events
 5. Dining
 6. Conducting Business
 7. Government / Post Office

- A majority (84%) feel that retaining the historic character of Uptown Jackson is “very” or “somewhat” important.
- A majority of respondents placed a high priority on adding family or casual dining options, a coffee / doughnut shop, and fine dining options to Uptown.
- Bars & nightclubs were ranked as the lowest priority by respondents, followed by lodging and an arcade as tied for second lowest priority.
- There was no majority consensus regarding a high priority Uptown improvement. However, “stricter code enforcement” was indicated to be a high priority by only 19% of respondents.
- Survey respondents were almost evenly split between the age groups of 35 to 49 and over 50 and most indicated they had lived in town for more than 20 years. Respondents demonstrated a wide range of incomes.

Information from the Web Survey will help in determining what adjustments to the Uptown Jackson retail mix could be effective. Strategies are formed to help Uptown develop greater appeal to nearby residents who most frequently use its businesses.

The priorities identified by the DREAM Community Survey task can help determine what retail mix may be successful and accepted in Uptown Jackson. 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: Uptown Business Priorities from Community Survey Tasks

Focus Groups		Web-based Resident Survey	
Casual/Family Dining	All 5 Groups	Casual/Family Dining	74%
Coffee Shop/Bakery	3 Groups	Coffee Shop/Bakery	67%
Specialty Shops	3 Groups	Fine Dining	54%
Antique Shop	3 Groups	Bookstore	52%
Entertainment/Events	2 Groups	Ice Cream/Soda Fountain	42%
Bookstore	1 Group	Clothing Stores	41%
Craft Store	1 Group	Art Galleries and Shops	32%
Music Store	1 Group	Convenience/Grocery	30%
Second-Run Movies	1 Group	Sporting Goods Store	30%
		Arts and Craft Store	29%
		Antique Shops	27%
		Arcade/Youth Attraction	24%
		Lodging	24%
		Bars/Nightclubs	22%

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BUSINESS MARKET

The City of Jackson, and the surrounding area, have a fairly active and diverse economy. Table 9, below, illustrates the total estimated employment in 2014, for the Jackson trade areas while Table 10 provides a listing of several of the regions largest employers. The center of employment activity in the region is obvious with about two-thirds of the businesses on this list being located in Cape Girardeau.

TABLE 9: 2014 TOTAL EMPLOYMENT

	Uptown Jackson	PTA	STA
Employees	562	5,113	9,120
Businesses	82	971	2,084

TABLE 10: JACKSON AREA EMPLOYERS

Employer	Location	Business Type	Employees
Saint Francis Healthcare Systems	Cape Girardeau	Healthcare (hospital)	2,576
SoutheastHEALTH	Cape Girardeau	Healthcare (hospital)	2,200
Procter & Gamble Paper Products	County	Manufacturing (paper)	1,300
Southeast Missouri State University	Cape Girardeau	Education	1,250
Cape Girardeau Public Schools	Cape Girardeau	Education	713
Jackson R-2 Schools	Jackson	Education	596
Isle Casino Cape Girardeau	Cape Girardeau	Casino	590
Wal-Mart Supercenter	Cape Girardeau	Retail	460
The Lutheran Home	Cape Girardeau	Healthcare (home/retirement)	394
Mondi Jackson, Inc.	Jackson	Packaging (flexible film)	375
City of Cape Girardeau	Cape Girardeau	Municipality	365
V.I.P. Industries	Cape Girardeau	Packaging (outsourcing custom)	360
Rubbermaid	Jackson	Manufacturing (plastic)	340
Drury Hotels	Cape Girardeau	Hospitality Services	329
AT&T - Missouri	Cape Girardeau	Utility Company	310
Delta Companies, Inc.	Cape Girardeau	Manufacturing (stone & rock)	300
Havco Wood Products	Cape Girardeau	Manufacturing (flooring)	280
Penzel Construction Company	Jackson	Construction	239
Wal-Mart Supercenter	Jackson	Retail	225
U.S. Postal Service	Cape Girardeau	Post Office	221
Exel, Inc.	County	Warehousing	200
Buzzi Unicem USA	Cape Girardeau	Manufacturing (cement)	194
Rhodes 101 Convenience Store	Cape Girardeau	Retail	193
American Railcar	Jackson	Manufacturing (railcar parts)	175
Wahico, D.W. Tool	County	Manufacturing (machine parts)	175
Community Counseling Center	Cape Girardeau	Charitable Organization	170
Missouri Veteran's Home	Cape Girardeau	Healthcare (nursing home)	170
Rust Communications	Cape Girardeau	Newspaper/Printing	170
Shaefer's Electrical Enclosures	Scott City	Manufacturing (electrical)	165
The Rhodes Group	Cape Girardeau	Automotive (tires)	160
JC Penney	Cape Girardeau	Retail	155

Source: Cape Girardeau and Jackson Chambers of Commerce

COMPARATIVE MARKET ANALYSIS

Although there is significant activity in Cape Girardeau, the City of Jackson is also a regional hub for employment and business activity. There are numerous local businesses and several attractions in Jackson that include:

- Cape Girardeau County Courthouse
- Cape Girardeau County Archive Center
- Cape Girardeau County Administrative Offices
- Cape Girardeau County Sheriff's Offices & Justice Center
- Jackson City Hall
- Jackson Chamber of Commerce
- Jackson Police / Fire Departments
- United States Post Office—Jackson, MO Branch
- Riverside Regional Library—Jackson Branch
- Oliver House Museum
- Jackson Municipal Pool
- Litz Park, Brookside Park, Football Park, Soccer Park, and Jackson City Park

There are also several regional attractions nearby Jackson, including:

- Southeast Missouri State University
- The Isle of Capri Casino in Cape Girardeau
- Trail of Tears State Park
- The Lewis and Clark Trail
- The St. Louis Iron Mountain Railway
- Mississippi River Access in Cape Girardeau

Jackson has seen new growth and development in areas outside of Uptown; primarily along corridors leading to Interstate 55.

TENANT MIX & LAND USE

The Land Use, Building & Infrastructure Survey, conducted in 2011 and subsequently updated in 2015 for this report, gathered information on how Uptown parcels of land are being used. Table 11, on the following page, identifies a total of 132 parcels on which are located 143 primary buildings that represent about 335,070 square feet of first-floor space. Thirty-four of these buildings were identified as retail and restaurant uses, representing about 59,680 square feet of space. About 6,975 square feet of the retail space was vacant. There were no restaurant vacancies.

Table 11 also identifies 47 office and service buildings along with 1 mixed-use structure that represent about 89,608 square feet of space with 4,150 square feet of vacancy. Overall, 11,125 square feet of Uptown space is vacant and suitable for easy conversion to retail use. The vacancy rate for retail is about 14% and is less than 5% for office and service uses.

Table 11 also indicates the overall composition of the existing occupied square footage in Uptown Jackson. The single largest land use is public / institutional with 130,216 square feet; about 39% of the total ground floor square footage. The remaining existing land-use is composed of about 26% office / service, 17% residential (with 1.5% as multi-family), 15% retail, 3% restaurant, and 1% mixed-use. Retail and restaurant uses are critical to establishing a vibrant business atmosphere. **However, in Uptown Jackson, non-retail/restaurant uses account for 82% of the available space.** This imbalanced situation may require the City of Jackson to review its zoning code and take action to preserve prime, first-floor spaces for retail and restaurant use. Additionally, the City could encourage the conversion of existing office/service spaces into retail and restaurant space.

TABLE 11: LAND USE TOTALS & SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Residential					
Single-Family	36	36	50,571	0	0.0%
Multi-Family	4	4	4,995	0	0.0%
Sub-Total	40	40	55,566	0	0.0%
Commercial					
Office / Service	29	47	85,668	4,150	4.8%
Retail	16	28	49,022	6,975	14.2%
Restaurant	3	6	10,658	0	0.0%
Sub-Total	48	81	145,348	11,125	7.7%
Mixed-Use	13	1	3,940	0	0.0%
Public / Institutional	24	21	130,216	0	0.0%
Public Parking	4	NA	NA	NA	NA
Vacant Lot	3	NA	NA	NA	NA
TOTAL	132	143	335,070	11,125	3.3%

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

* Building Square Footage is for 1st Floor.

MARKET RESEARCH FINDINGS

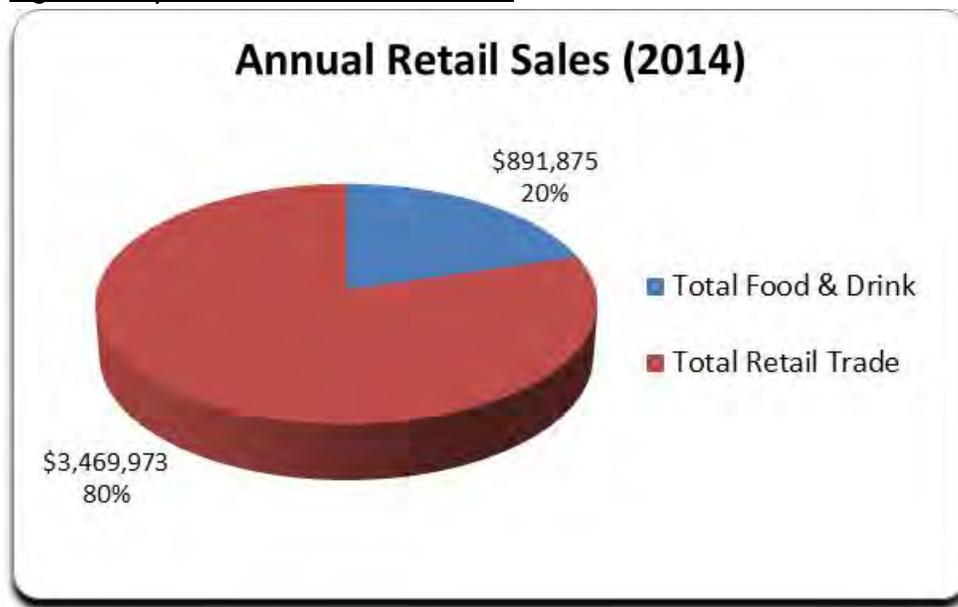
RETAIL ANALYSIS

A review of market conditions provides an idea of the possible new and existing business potential for Uptown Jackson. Uptown contains about 145,348 square feet of existing first-floor commercial space that includes:

- 10,658 square feet of restaurant space (fully occupied)
- 49,022 square feet of retail space (6,975 square feet vacant)
- 85,668 square feet of office/service space (4,150 square feet vacant)
- 3,940 square feet of mixed-use space (fully occupied)

Data show that the overall retail/restaurant space in Uptown is generating about \$4.36 million in annual sales (sales do not include auto dealers and related items, gasoline stations, or non-store retailers). **About 40% of the total Uptown sales is due to two business coded as "health & personal care store."** The retail component (removing any square footage for auto dealers and related items, gasoline stations, or non-store retailers) is generating \$3.47 million or about \$108.56 per occupied square foot. The restaurant component is generating about \$892,000 or about \$83.68 per occupied square foot. Figure 5, below demonstrates the split of Uptown Annual Sales from 2014 between retail and food & drink uses.

Figure 5: Uptown Jackson Annual Sales



Using the square foot averages noted on page 22, the 11,125 square feet of vacancy that can be easily used by a retail or restaurant use represents an additional \$925,000 to \$1.2 million in potential sales to the City.

Table 12, below, provides a breakdown of some of the retail establishments in Uptown Jackson, the PTA, and the STA that are currently productive in generating sales. Table 13, on the following page, provides a specific sampling of some of the main Uptown 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 Uptown Jackson business in these categories.

TABLE 12: RETAIL ESTABLISHMENTS

	Uptown Jackson		Primary Trade Area		Secondary Trade Area	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
TOTAL (Pedestrian-generating businesses):	17	71	127	882	212	1,134
Furniture & Home Furnishings Stores	0	0	7	28	10	34
Electronics & Appliance Stores	2	4	6	12	14	27
Bldg. Materials & Garden Equipment & Supplies	1	1	10	79	15	92
Food & Beverage Stores	1	2	12	59	19	89
Health & Personal Care Stores	2	12	12	48	15	53
Clothing & Clothing Accessories Stores	1	3	7	27	13	52
Sporting Good, Hobby, Book & Music Stores	1	2	5	9	10	15
General Merchandise Stores	1	2	5	229	5	230
Miscellaneous Store Retailers	3	8	22	77	35	93
Arts, Entertainment & Recreation	2	7	10	69	26	97
Accommodation	0	0	2	8	5	27
Food Services & Drinking Places	3	30	29	237	45	325
Total Businesses (including non-retail)	82		971		2,084	
Total Employees (including non-retail)	562		5,113		9,120	
Total Residential Population	148		14,156		29,821	
Employee/Population	3.80		0.36		0.31	

TABLE 13: EXISTING RETAIL

NAICS Industry Group	Store Name
Automotive	Fisher Auto Parts
	NAPA Auto Parts
	Woody's Auto Sales
Electronics & Appliance Stores	Gaming Grounds
	Siemer's Best Brands Plus
	Accent Security Alarms
Food & Beverage Stores	Jackson Frozen Food Lockers
Clothing Stores	Precious Memories
	SEMO Imprints
Jewelry, Luggage, and Leather Goods Store	Heritage Coins & Currency
	Curious George's
	Harold's Jewelry
Health & Personal Care Stores	Medicenter Pharmacy
	Jones Drugs
Florists	Sweetheart Florists
Sporting Goods/Hobby/Musical Instrument Stores	Jackson Audio & Music Supply
Miscellaneous Retailers	Premier Vapor
	High Street Station
	Cobblestone Corner
Office Supplies, Stationery, and Gift Stores	Print Zone
Used Merchandise Stores	Vintage Marketplace
	Amelia's Fashion Exchange
Specialty Foods	American Ice Cream
Food Services & Drinking Places	Golden Gate Chinese
	Dominos Tractors

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

	Uptown Jackson	Primary Trade Area	Secondary Trade Area
Median Household Income	\$40,220	\$44,426	\$48,836
Average Annual Household Expenditures for Selected Retail Sectors			
Food	\$5,402	\$6,968	\$7,343
Food at Home	\$3,306	\$4,286	\$4,531
Food Away from Home	\$2,096	\$2,682	\$2,812
Apparel and Services	\$974	\$1,226	\$1,269
Household Merchandise	\$1,201	\$1,778	\$1,886
Electronics	\$266	\$515	\$536
Household Goods	\$935	\$1,263	\$1,351
Household Care	\$1,580	\$2,264	\$2,492
Transportation and Travel	\$3,831	\$5,050	\$5,355
Transportation	\$2,979	\$3,912	\$4,153
Travel	\$852	\$1,138	\$1,203
Health & Personal Care	\$1,170	\$1,549	\$1,654
Health Care	\$439	\$614	\$671
Personal Care Products	\$731	\$935	\$984
Entertainment & Recreation	\$1,839	\$2,467	\$2,635
Total for Selected Sectors	\$15,998	\$21,302	\$22,635

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 differences between Uptown spending and that of the PTA and STA. Uptown has the lowest median household income and spends the least on these categories.

Table 15, on the following page, suggests Jackson’s potential purchasing power by providing the 2014 estimate of the number of households at regular income thresholds. Table 15 shows that about 30% of Uptown households have an annual income of less than \$25,000 and about 86% have an annual income of less than \$75,000. The table shows that inhabitants of the PTA and STA have slightly higher incomes with only 75% of the PTA households at an annual income of \$75,000 or less and 72% of the STA households at an annual 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 Uptown Jackson revitalization.

TABLE 15: HOUSEHOLD INCOME (2014 Estimated)

Income Level	Uptown Jackson	Primary Trade Area	Secondary Trade Area
Less than \$ 15,000	17	939	1,581
\$ 15,000 - \$24,999	8	621	1,183
\$ 25,000 - \$34,999	8	657	1,291
\$ 35,000 - \$49,999	19	893	1,835
\$ 50,000 - \$74,999	19	1,145	2,387
\$ 75,000 - \$99,999	7	648	1,443
\$ 100,000 - \$149,999	3	518	1,276
\$ 150,000 - \$199,999	1	92	288
\$ 200,000 +	1	173	284
Total	83	5,686	11,568

POTENTIAL STORE SPACE SUPPORTED

The City of Jackson has a trade area upon which Uptown businesses rely. However, the proximity of the Cape Girardeau market significantly impacts the health of the Jackson retail markets. Only General Merchandise Stores and Miscellaneous Store Retailers are currently meeting retail demand. This is an indication of the strong pull of the Cape Girardeau retail market satisfying the regional demand, as the goods are being purchased, but not within the STA. Some retail demand is also likely being met through internet purchases. However, the significant amount of retail in the region presents an opportunity for Uptown to develop strategies that will draw visitors to Uptown and capture more retail dollars for the City of Jackson.

Table 16, on page 27, shows the retail categories that are demonstrating unmet retail demand (the difference between retail demand and actual sales) for Uptown. The Analysis considers the total unmet retail demand within the STA and the average retail sales per square foot (\$108.56) and the average restaurant sales per square foot (\$83.68). While the table shows that Uptown could support an estimated 1,111,000 square feet of retail/restaurant space, this number is inflated by the grocery and department store uses, which are not likely to locate in a downtown environment due to today's retail market forces. Removing the demand shown for these uses leaves a total of about 690,000 square feet. This amount of square footage is still not likely to be met by Uptown Jackson alone as it is significantly more than current vacant space available that is easily converted to retail (11,125 square feet from Table 11 on page 21).

The significant shortage of retail space suggests that Uptown Jackson could compete with the Cape Girardeau retail market by some combination of the following:

- Fill existing Uptown vacancies with retail or restaurant uses.
- Develop added retail or restaurant square footage.
- Convert existing non-retail ground floor uses to retail or restaurant space.
 - ◊ Potential space for conversion could be the 130,216 square feet of public/institutional space; which represents 39% of total Uptown ground floor space.
- Encourage office and service uses to relocate to upper-floors and side streets to help preserving prime 1st-floor spaces for retail uses.

TABLE 16: FUTURE RETAIL GROWTH

Industry Group	Opportunity ¹	Potential Retail Area (sq.ft.) Supported ²
Grocery Stores (NAICS 4451)	\$28,773,789	265,061
Department Stores Excluding Leased Depts. (NAICS 4521)	\$16,898,314	155,665
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$16,709,422	153,925
Full-Service Restaurants (NAICS 7221)	\$10,088,867	120,563
Clothing Stores (NAICS 4481)	\$8,476,469	78,084
Limited-Service Eating Places (NAICS 7222)	\$5,933,886	70,911
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$5,025,000	46,290
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$3,221,492	29,676
Building Material and Supplies Dealers (NAICS 4441)	\$2,631,039	24,237
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$2,263,927	27,054
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$2,216,565	20,419
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$2,043,157	18,821
Furniture Stores (NAICS 4421)	\$1,990,909	18,340
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$1,926,089	17,743
Home Furnishings Stores (NAICS 4422)	\$1,775,775	16,358
Beer, Wine, and Liquor Stores (NAICS 4453)	\$1,478,009	13,615
Shoe Stores (NAICS 4482)	\$1,410,674	12,995
Special Food Services (NAICS 7223)	\$1,356,264	16,207
Specialty Food Stores (NAICS 4452)	\$266,062	2,451
Florists (NAICS 4531)	\$115,123	1,061
Book, Periodical, and Music Stores (NAICS 4512)	\$64,293	592
Used Merchandise Stores (NAICS 4533)	\$49,208	453
TOTAL:	\$114,714,333	1,110,522
ADJUSTED TOTAL:	\$69,042,230	689,796

¹ Indicates unmet consumer demand within the Secondary Trade Area.

² Based on \$108.56 in retail sales per square foot, \$83.68 in restaurant sales per square foot, and existing retail building inventory and activity in Uptown Jackson.

Table 16 provides a suggestion for prioritizing potential retail categories for attraction to Uptown locations. Existing retailers could capture some of the unmet demand in these specific retail categories by expanding their floor area and adding new products, or the City could work to attract new retailers to existing Uptown vacancies.

Other conclusions that are drawn from Table 16, include:

- The category of “Health & Personal Care Stores” includes products such as pharmaceuticals, cosmetics, perfumes, optical goods, and nutritional supplements. Some of these items may be necessities for nearby residents, but will also appeal to all City residents and visitors. Data indicate that about 40% of total Uptown sales is due to businesses in this category. The Uptown retail market needs to diversify and become less dependent upon this use.
- In the focus groups and web-based resident 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. However, a restaurant will be more successful in an area with a high visitor draw or in close proximity to a vibrant residential market. The unmet demand exists for restaurant uses, but Uptown will need to focus on attracting visitors and developing more residential units in or near Uptown.
- As noted, the retail sectors of “Department Stores” and “Grocery Stores” are demonstrating a great amount of unmet demand. However, the retail gaps in these sectors are noteworthy because they may indicate an opportunity for existing merchants to adjust their product lines to carry department store types of goods or grocery items.
- “Clothing Stores” are demonstrating a large amount of demand and could be combined with “Jewelry, Luggage, and Leather Goods”, and/or “Shoe Stores” to develop a larger store. This type of store can range from a boutique-style shop to a larger anchor store.
- 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. However, such a store might compete with the offerings of an exiting appliance store. 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.

- “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 unmet demand demonstrated in this category supports several comments from the focus group participants regarding the need for a Jackson music store.
- As noted, stores selling products in most of the other categories listed in Table 16 are all showing fair amounts of unmet demand. Uptown may not want to target “Florists”, “Book, Periodical, and Music Stores”, or “Used Merchandise Stores” as they are demonstrating small amounts of unmet retail demand. However, other categories could be stand-alone stores or could be combined with similar products as previously discussed.

AVAILABLE RETAIL SPACE INVENTORY

The vacant properties identified in Uptown Jackson are shown below on Table 17, and on the 1st Floor Vacancy Map in Appendix D. As of March 2015, there are only six Uptown Jackson vacancies. These vacancies range from 550 square feet to 3,000 square feet. The average available existing vacant space in Uptown is 1,750 Square feet.

TABLE 17: 1ST FLOOR VACANCY

ID	Address	Available Sq.Ft.
1	111 West Main Street	1,700
2	321 South High Street	3,000
3	102 South High Street	550
4	117 South Hope Street	1,650
5	107 East Adams Street	1,150
6	208 South High Street	2,500

In matching the existing vacant storefronts with the types of businesses demonstrating unmet retail demand, the City should consider the size, geographic location, condition, and proximity of the vacant space to similar Uptown businesses. The sizes of the existing vacant spaces in Uptown are quite small and this will limit the uses that could locate in these buildings. Additionally, the limited amount of overall available vacancy, while a positive economic factor, also hampers the ability of Uptown to

attract new retail stores. The City should look carefully at the amount of public/institutional space in Uptown (130,216 square feet or 39%) and consider if there are ways to convert some of this space back to retail or restaurant uses. As noted, there are also some parking lots or vacant lots that could be acquired for development of multi-story mixed use buildings.

UPTOWN JACKSON RETAIL GOALS

- DEVELOP SUPPORT PROGRAMS FOR EXISTING BUSINESSES

The Jackson Chamber of Commerce works to stimulate economic growth, business and industry expansion, and provide relevant resources and information to its membership. The Chamber currently promotes the City, recognizes existing members, provides ribbon cutting ceremonies and monthly networking events, and offers business seminars.

The Uptown Jackson Revitalization Organization (UJRO) is focused on Uptown activities and improvements. The UJRO and the Chamber should continue to work closely with each other to provide services that will help existing Uptown Jackson retailers succeed and grow. 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 Uptown's retailers have been in business for many years and could benefit from networking with other store operators, hearing fresh ideas, reviewing information regarding the changing markets of Jackson, and developing a support structure with which to discuss their common issues and needs. The UJRO should try to bring all of these services to Uptown businesses.

- ENCOURAGE THE DEVELOPMENT OF SPACES BETTER SUITED TO RETAIL USES

There are currently few existing Uptown properties that are available for retail or restaurant use. Additionally, some of the available properties in Uptown are in need of rehabilitation and there are many buildings occupied by public/institutional or office/service uses. This practice takes revenue generating retail properties off the market and can erode Uptown's tax base.

The City should seek multi-story, mixed-use infill development along with the rehabilitation of existing buildings. Improvements to the building stock, with a focus on retail development, should enhance existing conditions and improve the demand for retail space in Uptown. The City should also monitor the mix of businesses to ensure a variety of activities that will have broad retail appeal. Through zoning regulations, prime, ground-floor spaces should be reserved for restaurant and retail uses.

- DEVELOP A BRAND TO DRAW CONSUMERS AND VISITORS TO UPTOWN JACKSON

The City of Jackson struggles with differentiating itself within the regional draw of the Cape Girardeau retail market; and Uptown Jackson seeks an identity within the City of Jackson market. The City should consider the draw of the attractions in Cape Girardeau such as SEMO, The Isle of Capri Casino, the Mississippi Riverfront, and Downtown Cape and work to develop a niche brand for Jackson that will capture some of the visitors to these attractions. The DREAM marketing task will work with Uptown to help initiate this branding effort. The marketing task is occurring concurrently with this retail analysis. However, potential niches or audiences for Jackson to develop or attract might include:

- ◇ Parents/Faculty/Staff of SEMO
 - ⇒ Focus on the needs of these markets, rather than the students
- ◇ Weekend visitors to the hotel/casino
 - ⇒ Develop day trip activities and restaurants understanding that evening entertainment will occur at the casino
- ◇ Boutique items such as antique stores
 - ⇒ Approximately 6 to 10 of these stores working together can begin to develop into an attraction by themselves
 - ⇒ Other potential store categories include specialty foods, clothing, and art galleries and supplies
- ◇ Goods and services for local residents
 - ⇒ Uptown Jackson, being the County Seat of Cape Girardeau County, could focus on meeting local needs.
 - ⇒ This strategy will likely not result in a large retail base, but with the addition of categories such as construction supplies, furniture and home furnishings, and office supplies the retail base could be expanded.
 - ⇒ This market would also support restaurant uses, primarily at breakfast and lunch.

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

- MONITOR THE MIX OF EXISTING UPTOWN USES

As noted, it is important that Uptown 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 Uptown uses, the UJRO should track existing businesses to monitor available storefronts and the overall store mix.

A close relationship between the City, UJRO, and the Uptown businesses is critical as there are relatively few stores in Uptown. A regular gathering of Uptown interests, perhaps before or after Chamber meetings, could identify minor issues before they grow into major problems for Uptown. The City should continue to market vacancies and try to fill them with stores from the targeted retail list found in the analysis. The UJRO should be involved in maintaining and updating all Uptown information.

Jackson has developed commercial areas nearer to Interstate 55, outside the core of the City. The growth of these nodes and corridors have resulted in a number of fast-food type restaurants. Uptown has an opportunity to cater to diners seeking a more nostalgic, full-service atmosphere. The goal for Uptown restaurants is to complement the existing business mix to create an overall pedestrian destination that people visit for many reasons.

- IMPROVE THE QUALITY OF EXISTING RESTAURANTS AND RETAIL BUSINESSES

The sales per square foot of retail and restaurants in Uptown Jackson could be improved upon. The \$82.53 for retail square footage is somewhat low. However \$83.68 per square foot for restaurants is very low and suggests the existing Uptown restaurants are selling primarily low ticket meals. This 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 Uptown in proximity to a church.

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

- **CULTIVATE LOCAL ENTREPRENEURS**

As Uptown 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. Along with Jackson residents, a likely source of entrepreneurs may come from the families of the faculty and staff at SEMO. These families may have stable incomes that will allow a family member or two interested in starting a business.

The UJRO and Chamber should consider 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 Uptown opportunities. With some innovative new businesses, Jackson could also become known as the regional small business start-up incubator.

- **ENCOURAGE EXISTING RETAIL EXPANSION**

It is important to understand that consumers will travel greater distances for a better choice in variety. With Jackson's proximity to the wide variety of products offered in Cape Girardeau and other markets, as well as the internet, it is critical that Uptown demonstrate a good variety of entertainment, shopping, and dining options. Uptown can broaden its retail variety by encouraging existing retailers to address categories of unmet demand as identified in Table 16 on page 27. These areas represent opportunities for local businesses to expand sales floors or add product lines.

- **CONTINUE TO DEVELOP UPTOWN EVENTS**

Uptown Jackson 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 a good example of such an event. Residents and visitors attend the event, and hopefully 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 Jackson area restaurants. An event with alcohol should always include food and end earlier in the evening.

UPTOWN JACKSON STRATEGIES

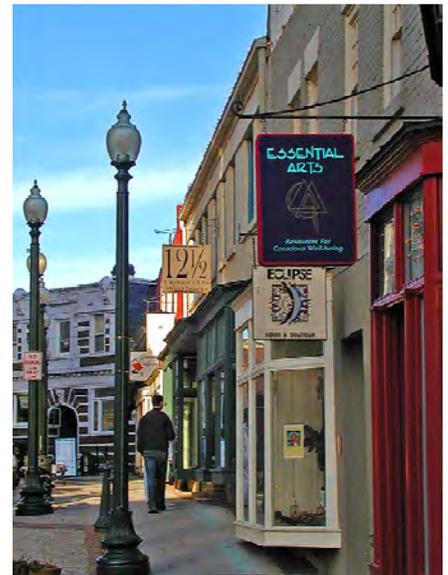
Achieving Uptown’s retail goals can be obtained by implementing several key strategies. These strategies must be realistic and based on an understanding of Uptown Jackson’s current retail market, its primary customers, and the spending potential of key customer segments identified earlier in this analysis.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

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 Uptown Jackson 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.

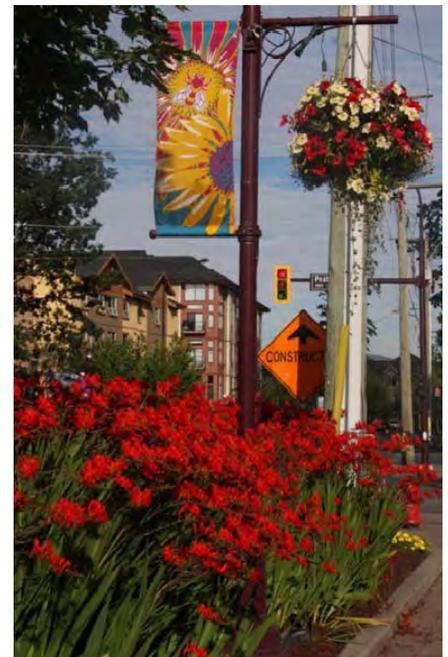
Older downtowns, by their very natures, are walkable. They evolved during a period when high density and pedestrians were commonplace. Downtowns can continue to provide an environment where walking can be enjoyable and a practical means of getting around. Great streetscapes become an integral part of 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

Uptown Jackson's historic architectural character and physical layout is the key to its draw as a unique retail environment. Protecting and improving the quality of the built environment is critical for Uptown 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 Uptown Jackson. New public sector mechanisms such as a Community Improvement District (CID) should be considered. However, the existing Uptown Jackson Revitalization Organization should have funding available to continue to provide programs or obtain 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 Uptown Jackson's priorities:

- The City must continue to encourage Uptown façade restoration. The rehabilitation and productive reuse of Uptown buildings is the cornerstone of the revitalization effort. Building façades are a public feature of Uptown Jackson 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. Uptown Jackson should seek mixed-use projects that include residential units.
- Encourage appropriate infill construction that adds retail space to Uptown. There is a significant amount of open or vacant lots used as parking. Retail uses should be the priority for 1st-floor space in all new buildings. It is critical that the City ensure that infill construction complements existing buildings.
- Support code enforcement and plan review efforts. The City's code enforcement efforts should be continued and strengthened to ensure that Uptown 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 UJRO works with the Chamber to provide economic development services for the region. However, there could be a specific focus on Uptown businesses. The UJRO should collaborate with the Chamber and City to attract new retail uses and to 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 Uptown vacancies. Vacant lot and space listings should 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 UJRO should develop a listing of target businesses to contact. This listing should be limited to retail, restaurants, or unique services for Uptown. Businesses in Cape Girardeau may be likely candidates for expansion by opening another location in the Jackson area.

The UJRO 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 Uptown. 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 Uptown. Involvement of property owners as part of the support system for encouraging private investment is critical.



A Business Retention, Expansion, and Recruitment campaign should also foster the existing entrepreneurial spirit within Jackson. Small businesses are the core of many local economies and can generate significant job growth and revenue. Uptown 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 URJO should again collaborate with the Chamber to identify local entrepreneurs. Through programs such as www.operationjumpstart.biz, Uptown leaders can assist business start-ups and help connect aspiring business owners with financial and technical resources.

LIMIT NON-RETAIL USE

The appropriate mix of retail is a key to Uptown Jackson'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. 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 along High and Main Streets in Uptown Jackson. While there are smaller pockets of retail and more vehicular-oriented retail along S. Hope Street, pedestrians will want to shop in Uptown. 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 Uptown businesses.

Anchors are large, well-known attractions that draw many customers. Anchors are usually retail stores or restaurants, but they can also be a collection of establishments or an institution. Anchors include the following types of retail uses:

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



The UJRO should maintain a close relationship with existing anchors, such as Tractor’s Restaurant. New anchors should be encouraged where possible. The UJRO and Chamber should develop promotions around Uptown anchors. The City should consider the locations of these important retail stores when planning public construction projects so as not to disrupt business any more than necessary.

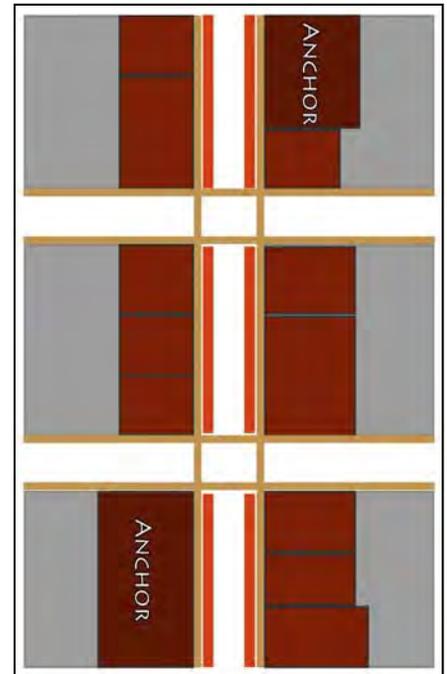
PROMOTE USE OF UPPER FLOOR SPACE

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 Uptown retail market by creating additional demand for products and services. Uptown residents also ensure that an area has activity, even when businesses close. Uptown Jackson has a stable ownership market surrounding Uptown, but few residents live in Uptown. There are some buildings that could accommodate residential development through apartments, condominiums, or lofts on the upper floors. 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 Uptown 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. Uptown Jackson must convey a comfort level that welcomes shoppers, diners, and visitors in the context of its unique experience. Merchants can develop this unique experience through retail methods and 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 Uptown 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 Uptown Jackson.

ATTRACTING CUSTOMERS

Attracting customers is an integral component of retail success. Uptown Jackson 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 Uptown 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.

The UJRO can help provide a focus on marketing to help Uptown develop vibrant activity centers. Uptown business guides and restaurant profiles should be made available on-line, at welcome centers, hotels, at the casino in Cape Girardeau, and at shops and restaurants. During City and regional events, retailers should coordinate their hours and promotions to help serve the increased numbers of visitors.

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 Uptown Jackson. The UJRO, City, and Chamber should continue to build upon Uptown as a venue for events, festivals, parades, and concerts. These



activities bring people Uptown and expose them to Uptown businesses. The marketing strategy for Uptown Jackson should provide a mix of events, advertising, and promotions that reflect different aspects of the region, history, and cultural heritage. Eventually, the UJRO should determine ways to collectively promote and advertise Uptown businesses on a consistent basis.

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.

The UJRO should work with property owners of vacant spaces to provide displays or advertising for Uptown events to prevent the vacant feeling.



WINDOW “HOW-TO’S”

Window displays must grab the attention of the pedestrian so they will be drawn into the store. Displays should incorporate graphic elements that highlight the stores merchandise. Window displays must also be rotated occasionally to keep the pedestrian 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 uses, such as restaurants, theaters, and drinking establishments may be compelled to visit later. However, window lighting should not impose on upper-story residents.

SIGNAGE AND BRANDING

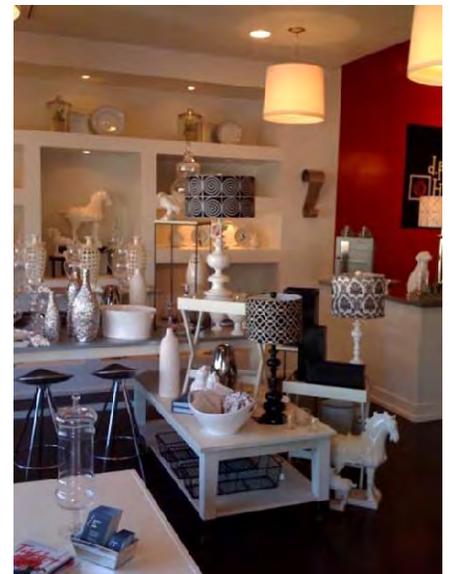
Business owners must decide upon their brand to help define their store and how they hope to be perceived. This decision will determine the store logo, signage, design, colors, and font types; all of which should coordinate and support the brand. Logos should be used consistently on merchandise, business cards, and advertisements. Shopping bags with logos are walking advertisements that reinforce the 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 Uptown. 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 Uptown Jackson's retail market. The implementation of these goals and strategies will be included in the Jackson DREAM Uptown 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 Marketing task, 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, Uptown Jackson is lacking in residential, retail, and restaurant uses. However, there are few vacancies and a significant amount of unmet demand. The existing vacant space will likely be easily filled if the City focuses on improving building conditions.
- A potentially bigger impact than filling existing vacant space may be obtained by attracting infill development to underutilized or vacant lots. This development should include multi story, mixed-use buildings to increase the retail and residential markets in Uptown Jackson.
- On the heels of residential development, should come an increase to the already high demand for restaurant uses.
- 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 also monitor the amount of public/institutional space and consider zoning actions to adjust these uses over time.
- The UJRO should encourage Uptown businesses to offer higher-quality goods. The current retail sales per square foot amount is fairly low and the restaurant sales amount is very low. Uptown can generate more income for the City if the overall quality of goods sold can be improved.
- Uptown may wish to consider a funding mechanism such as a Community Improvement District (CID) to fund UJRO activities and provide a stable funding source focused on Uptown improvements and programs.
- Expand the existing streetscape design on High Street to other Uptown streets while maintaining a focus on the safety of the pedestrian. It is important that pedestrians can easily and safely navigate Uptown.
- The City should also consider the impact that the existing large parking lots, primarily related to institutional uses, have on Uptown pedestrian activity. These lots may provide open views, but also offer little to the pedestrian and may not be truly needed.

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APPENDIX

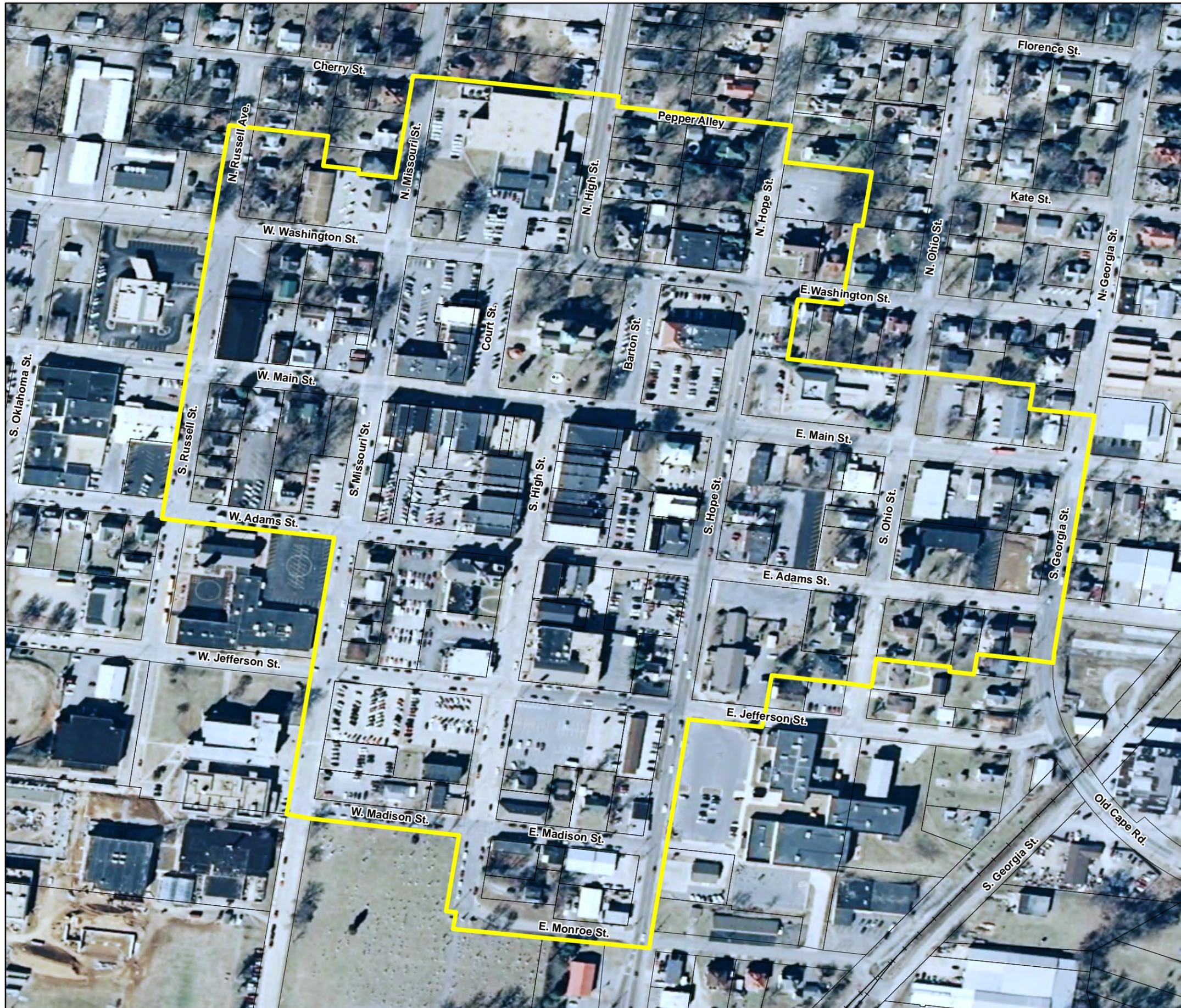


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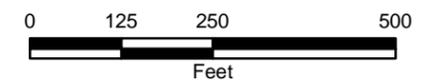
Appendix A-1 Uptown Jackson

Retail Market Analysis
City of Jackson, Missouri



Legend

 DREAM Boundary

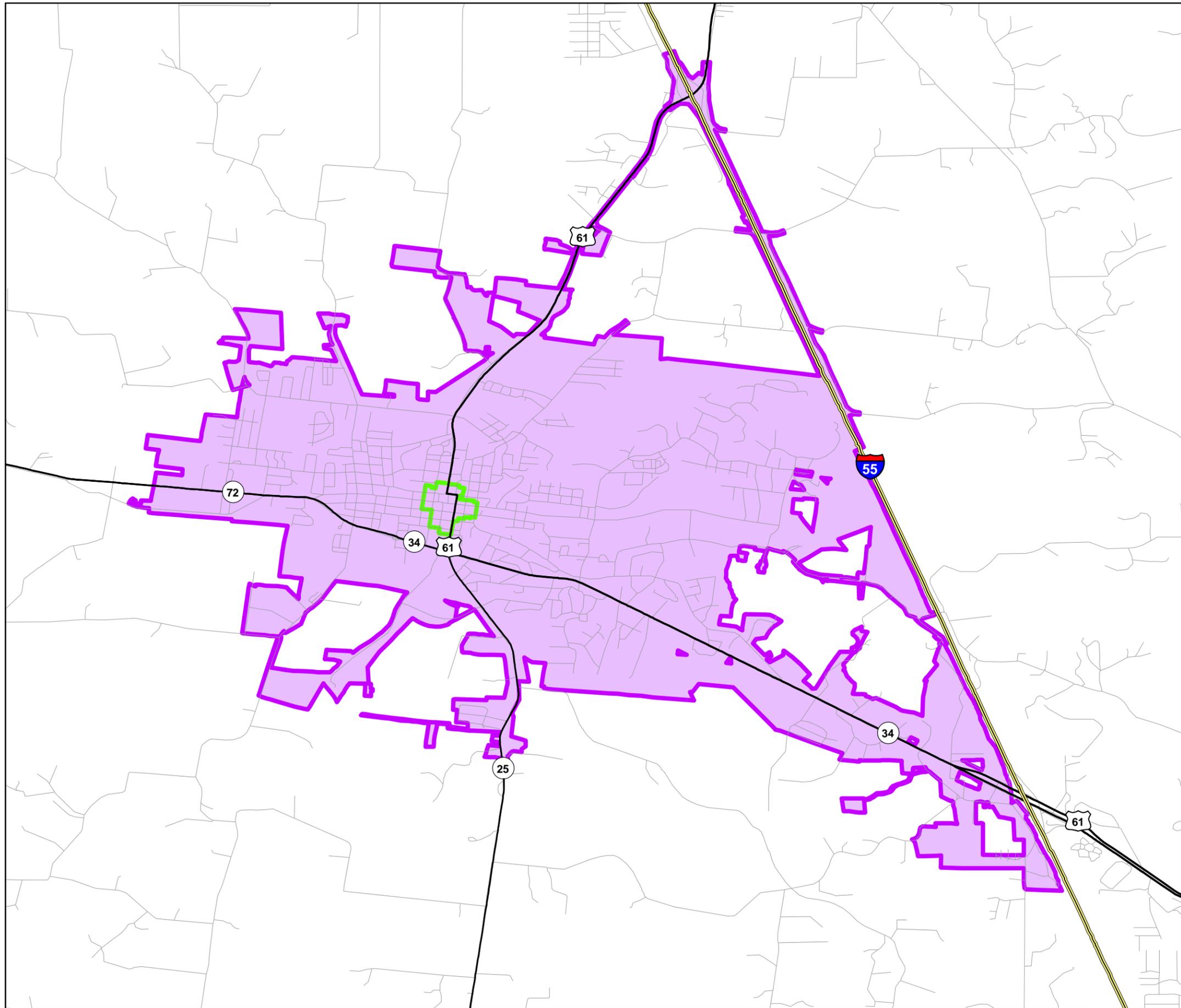


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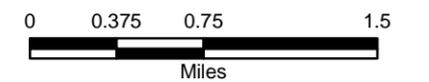
Appendix A-2 Primary Trade Area

Retail Market Analysis
City of Jackson, Missouri



Legend

-  DREAM Boundary
-  Primary Trade Area

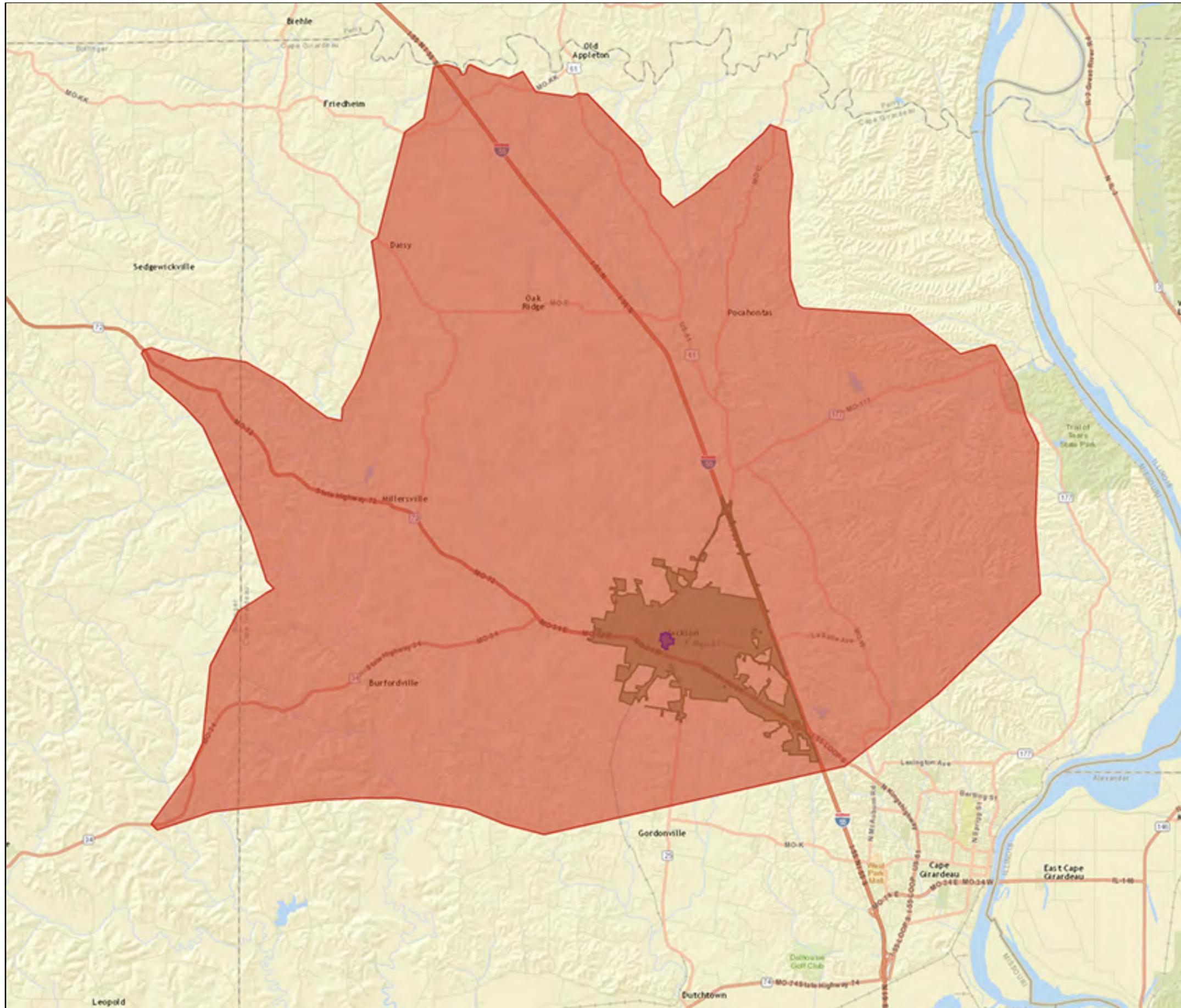


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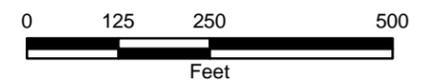
Appendix A-3 Secondary Trade Area

Retail Market Analysis
City of Jackson, Missouri



Legend

-  DREAM Boundary
-  Primary Trade Area
-  Secondary Trade Area



March 2015



Appendix B

Uptown Jackson DREAM Study Area
Retail Demand & Sales

Industry Group	Secondary Trade Area Demand	STA Businesses	STA Total Retail Sales	STA Gap	Potential Square Footage	STA Per Capita Demand	City Retail Demand	City Businesses	City Total Retail Sales	Uptown Total Retail Sales	Uptown Businesses	Uptown Trade Area Capture	Uptown Pull-factor
Total Retail Trade and Food & Drink (NAICS 44-45, 722) ¹	\$204,228,317	158	\$114,589,581	\$ 89,638,736	1,082,901	6,848	\$94,762,095	101	\$94,586,973	\$4,361,848	12	637	4.30
Total Retail Trade (NAICS 44-45)	\$172,910,094	133	\$102,914,303	\$ 69,995,791	848,166	5,798	\$80,059,014	82	\$85,427,259	\$3,469,973	9	598	4.04
Total Food & Drink (NAICS 722)	\$31,318,223	26	\$11,675,278	\$ 19,642,945	234,735	1,050	\$14,703,081	19	\$9,159,714	\$891,875	3	849	5.74
Furniture & Home Furnishings Stores (NAICS 442)	\$6,080,957	8	\$2,314,272	\$ 3,766,685	45,642	204	\$2,842,477	5	\$1,732,628	\$0	0	0	0.00
Furniture Stores (NAICS 4421)	\$3,421,196	4	\$1,430,287	\$ 1,990,909	24,125	115	\$1,616,543	2	\$1,149,462	\$0	0	0	0.00
Home Furnishings Stores (NAICS 4422)	\$2,659,761	5	\$883,986	\$ 1,775,775	21,518	89	\$1,225,934	3	\$583,166	\$0	0	0	0.00
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$7,840,501	12	\$2,815,501	\$ 5,025,000	60,890	263	\$3,673,250	5	\$2,027,121	\$161,011	1	612	4.14
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$10,288,326	15	\$5,614,130	\$ 4,674,196	56,639	345	\$4,658,733	10	\$4,562,509	\$0	0	0	0.00
Building Material and Supplies Dealers (NAICS 4441)	\$8,245,169	15	\$5,614,130	\$ 2,631,039	31,881	276	\$3,783,880	10	\$4,562,509	\$0	0	0	0.00
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$2,043,157	0	\$0	\$ 2,043,157	24,758	69	\$874,853	0	\$0	\$0	0	0	0.00
Food & Beverage Stores (NAICS 445)	\$37,081,967	18	\$6,594,500	\$ 30,487,467	369,428	1,243	\$17,186,016	11	\$4,222,001	\$165,424	1	133	0.90
Grocery Stores (NAICS 4451)	\$34,816,193	13	\$6,042,404	\$ 28,773,789	348,663	1,168	\$16,127,465	8	\$3,812,311	\$165,424	1	142	0.96
Specialty Food Stores (NAICS 4452)	\$787,765	5	\$521,703	\$ 266,062	3,224	26	\$365,155	3	\$409,690	\$0	0	0	0.00
Beer, Wine, and Liquor Stores (NAICS 4453)	\$1,478,009	0	\$0	\$ 1,478,009	17,910	50	\$693,396	0	\$0	\$0	0	0	0.00
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$23,522,215	15	\$6,812,793	\$ 16,709,422	202,475	789	\$10,736,519	12	\$6,278,989	\$1,846,923	2	2,341	15.82
Clothing and Clothing Accessories Stores (NAICS 448)	\$15,765,770	13	\$3,952,538	\$ 11,813,232	143,145	529	\$7,447,978	7	\$1,817,855	\$243,300	1	460	3.11
Clothing Stores (NAICS 4481)	\$11,046,129	9	\$2,569,660	\$ 8,476,469	102,713	370	\$5,207,885	5	\$762,883	\$126,818	1	342	2.31
Shoe Stores (NAICS 4482)	\$2,321,866	2	\$911,192	\$ 1,410,674	17,094	78	\$1,091,607	1	\$741,500	\$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$2,397,775	3	\$471,686	\$ 1,926,089	23,339	80	\$1,148,486	1	\$313,472	\$0	0	0	0.00
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$4,532,850	11	\$1,247,065	\$ 3,285,785	39,815	152	\$2,103,253	5	\$422,865	\$0	0	0	0.00
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$4,201,524	9	\$980,032	\$ 3,221,492	39,036	141	\$1,946,165	4	\$355,420	\$0	0	0	0.00
Book, Periodical, and Music Stores (NAICS 4512)	\$331,326	2	\$267,033	\$ 64,293	779	11	\$157,088	1	\$67,445	\$0	0	0	0.00
General Merchandise Stores (NAICS 452)	\$58,942,243	5	\$65,671,845	\$ (6,729,602)	(81,545)	1,977	\$27,357,750	5	\$57,336,619	\$0	0	0	0.00
Department Stores Excluding Leased Depts. (NAICS 4521)	\$20,152,797	3	\$3,254,483	\$ 16,898,314	204,763	676	\$9,422,002	3	\$3,074,780	\$0	0	0	0.00
Other General Merchandise Stores (NAICS 4529)	\$38,789,446	2	\$62,417,362	\$ (23,627,916)	(286,309)	1,301	\$17,935,748	2	\$54,261,839	\$0	0	0	0.00
Miscellaneous Store Retailers (NAICS 453)	\$8,855,264	35	\$7,891,658	\$ 963,606	11,676	297	\$4,053,038	22	\$7,026,672	\$168,441	3	567	3.83
Florists (NAICS 4531)	\$343,543	2	\$228,420	\$ 115,123	1,395	12	\$149,533	2	\$218,996	\$0	0	0	0.00
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$2,637,316	10	\$420,751	\$ 2,216,565	26,859	88	\$1,227,298	6	\$253,040	\$68,046	1	769	5.20
Used Merchandise Stores (NAICS 4533)	\$517,714	7	\$468,506	\$ 49,208	596	17	\$242,720	2	\$269,440	\$0	0	0	0.00
Other Miscellaneous Store Retailers (NAICS 4539)	\$5,356,692	16	\$6,773,980	\$ (1,417,288)	(17,174)	180	\$2,433,487	12	\$6,285,196	\$64,883	1	361	2.44
Food Services & Drinking Places (NAICS 722)	\$31,318,223	26	\$11,675,278	\$ 19,642,945	234,735	1,050	\$14,703,081	19	\$9,159,714	\$891,875	3	849	5.74
Full-Service Restaurants (NAICS 7221)	\$11,665,909	6	\$1,577,042	\$ 10,088,867	120,563	391	\$5,477,218	4	\$1,012,191	\$302,981	1	774	5.23
Limited-Service Eating Places (NAICS 7222)	\$15,422,187	15	\$9,488,301	\$ 5,933,886	70,911	517	\$7,238,468	11	\$7,615,306	\$432,282	1	836	5.65
Special Food Services (NAICS 7223)	\$1,428,155	1	\$71,891	\$ 1,356,264	16,207	48	\$659,324	0	\$0	\$0	0	0	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$2,801,971	4	\$538,044	\$ 2,263,927	27,054	94	\$1,328,071	4	\$532,217	\$156,612	1	1,667	11.26

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

Appendix C Retail Locations

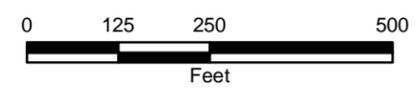
Retail Market Analysis City of Jackson, Missouri



Legend

-  DREAM Boundary
-  Restaurant / Bar
-  Retail
-  Commercial / Retail

ID	Commercial Location
1	Golden Gate Chinese
2	Medicenter Pharmacy
3	SEMO Imprints
4	Jones Drugs
5	Harold's Jewelry
6	Gaming Grounds
7	Jackson Audio & Music Supply
8	Heritage Coins & Currency
9	Curious George's
10	Best Brands Plus
11	Sweetheart Florists
12	Print Zone
13	Lloyd's of Jackson
14	Vintage Marketplace
15	High Street Station
16	Amelia's Fashion Exchange
17-18	Tractors
19	Precious Memories
20	Cobblestone Corner
21	Accent Security Alarms
22	American Ice Cream
23	Premier Vapor
24	Jackson Frozen Food Lockers
25	NAPA Auto Parts
26	Woody's Auto Sales
27	Fisher Auto Parts
28	Domino's



March 2015

Appendix D 1st Floor Vacancies

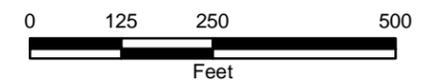
Retail Market Analysis
City of Jackson, Missouri



Legend

-  DREAM Boundary
-  Vacant Building

ID	Address	Available Sq.Ft.
1	111 West Main Street	1,700
2	321 South High Street	3,000
3	102 South High Street	550
4	117 South Hope Street	1,650
5	107 East Adams Street	1,150
6	208 South High Street	2,500

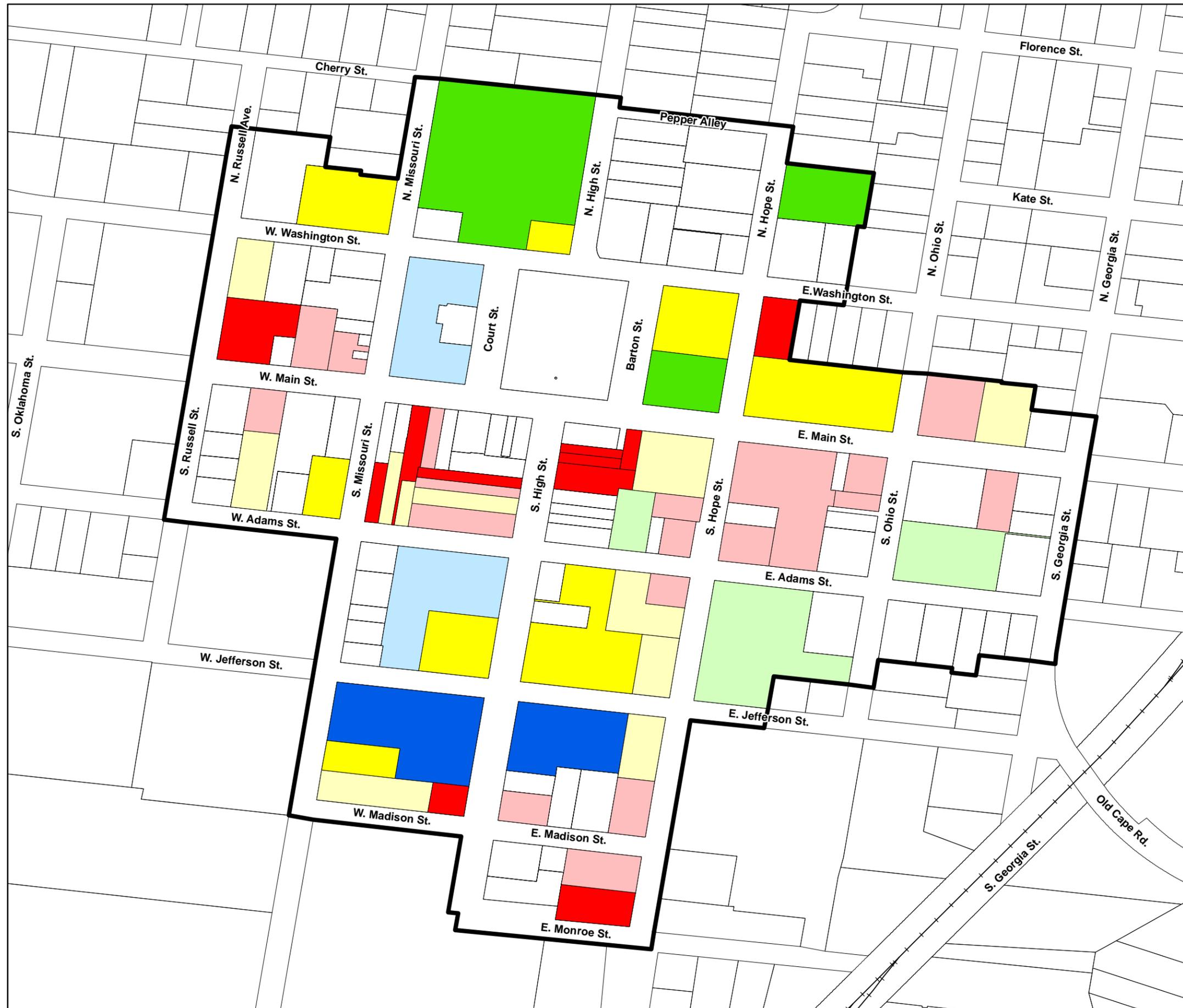


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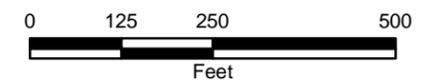
Appendix E Off Street Parking

Retail Market Analysis
City of Jackson, Missouri



Legend

-  DREAM Boundary
-  1-5 Parking Spaces
-  6-10 Parking Spaces
-  11-20 Parking Spaces
-  21-30 Parking Spaces
-  31-40 Parking Spaces
-  41-50 Parking Spaces
-  51-60 Parking Spaces
-  100 or more Parking Spaces



March 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

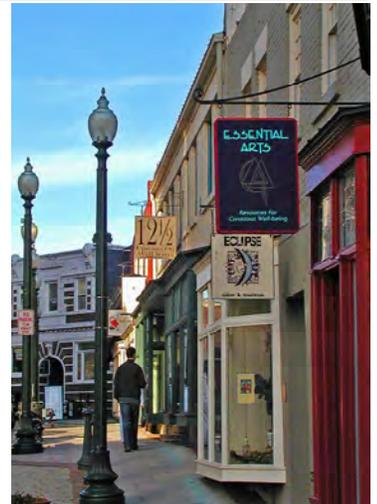
- Is the storefront generally clean?

- 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

- Is the sidewalk clean and level?

Yes

No

Description

Exterior Signage:

- Does signage occur at eye level (Pedestrian)?

Yes

No

Description

- Does signage occur at car level (Driver)?

Yes

No

Description



Existing Store Checklist

Exterior Signage:

- Do wall signs obstruct the architecture?

Yes

No

Description

- Is signage maintained in good condition?

Yes

No

Description

- Does the signage complement the building and area?

Yes

No

Description

- Are the exterior signs lighted (at night)?

Yes

No

Description



Existing Store Checklist

Display Windows:

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

Description



- Are window displays rotated every 4-6 weeks?

- Yes
 No

- Do the displays effectively represent the store brand?

- Yes
 No



- Are displays including the best/most popular products?

- Yes
 No

Description



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

- Yes
 No

Description



- Are the window displays lit at night?

- Yes
 No

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

Ceiling:

- Is the finish in good condition (stained/missing tiles/peeling paint)?
 - Yes
 - No

Description

- 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

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

Yes

No

Description

- Are the paint colors consistent from fixture to fixture?

Yes

No

Description

Circulation:

- Does the foot traffic flow smoothly?

Yes

No

Description



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
-
-
-
-



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



Fixtures & Equipment:

- Does the fixture style match the brand or logo?

Yes

No

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

Yes

No

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

Yes

No

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

Yes

No

Description



Merchandising:

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

Yes

No

Existing Store Checklist

Merchandising:

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

Yes

No

- Does the product inventory match the internet site?

Yes

No

Description

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

Yes

No

Description

Cleanliness:

- Is the store clean?

Yes

No

Description

- Are boxes cleared and out of sight?

Yes

No

- Are the views into off limits areas blocked?

Yes

No



Existing Store Checklist

Cleanliness:

- Are the signs and product pricing professional, consistent in type and not hand made?

Yes

No

Description



Comfort:

- Is the shop a comfortable temperature?

Yes

No

- Are the entry doors easy to open and close?

Yes

No

- Are the displays and fixtures stable?

Yes

No

- Is music incorporated to make the store feel occupied?

Yes

No

- Does the music reflect the store brand?

Yes

No



Dressing Rooms:

- Is there a bench, wall hook and mirror?

Yes

No

- Are the doors secure and is privacy addressed?

Yes

No

- Are non-selected items returned to stock quickly?

Yes

No



Existing Store Checklist

Dressing Rooms:

- Are the rooms placed to discourage shoplifting?

- Yes
- No

Staff:

- Is the staff helpful and cheerful?

- Yes
- No

Description

- Is the staff educated about the merchandise?

- Yes
- No

Description

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

- Yes
- No

Description

Other Comments.

