Cassville, Missouri

DOWNTOWN
REVITALIZATION &
ECONOMIC
ASSISTANCE FOR
MISSOURI

RETAIL MARKET ANALYSIS

AUGUST 2015

PGAV PLANNERS

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

ACKNOWLEDGMENTS

CASSVILLE

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Downtown Revitalization and Economic Assistance for Missouri
D·R·E·A·M Initiative

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EXECUTIVE SUMMARY

Cassville is the County Seat of Barry County, and is located approximately 30 miles south of Interstate 44 in Southwest Missouri. The City was named after prominent Michigan politician Lewis Cass. Barry County was formed in 1835 and once consisted of the entire southwest corner of Missouri. The County gradually became smaller as other counties were carved out of Barry County's territory. This moved the county seat several times until 1844 when the County Seat was moved to Cassville. Cassville's Main Street was once known as the "Wire Road"; a trail that connected with what is now Interstate 44 to the north that followed the telegraph line in 1859. During the 2010 U.S. Census, Cassville had a population of 3,266. However, 2014 estimates provided from ESRI Business Analyst and based on the 2010 Census put the City's population at 3,072 people living in 1,192 occupied housing units.

This Retail Market Analysis reveals that Downtown could see an increase in sales if Downtown businesses can absorb some unmet retail demand. These projections are based on existing sales volumes, vacant floor space, and estimated leakage of retail dollars being spent outside of Downtown and the City limits. Downtown Cassville competes primarily with the internet and other retail facilities within the City.

The Retail Market Analysis was conducted by analyzing data for three areas: The Downtown Trade Area (DTA) which is the DREAM study area; the Primary Trade Area (PTA) which is the City limit; and the Secondary Trade Area (STA) which is a 30 minute drive-time from Downtown Cassville. The existing retail market, demographics, and DREAM community input were also documented and analyzed to help define a strategy that takes into account public preferences to strengthen the retail market in Downtown Cassville.

A review of market conditions provides an idea of the possible new and existing business potential for Downtown Cassville. The DREAM Land Use, Building, and Infrastructure Survey revealed about 318,100 Square feet of existing first-floor commercial space that includes:

- 21,500 square feet of restaurant space (6,200 square feet vacant)
- 97,900 square feet of retail space (5,500 square feet vacant)
- 164,400 square feet of office/service space (15,500 square feet vacant)
- 34,300 square feet of mixed-use space (2,650 square feet vacant)
- Additionally, there is 7,400 square feet of vacant industrial space that could be adapted for a retail use.

Data from ESRI Business Analyst show that the overall retail/restaurant space is generating about $14.7 million in annual sales (sales do not include auto dealers, gasoline stations, or non-store retailers and grocery stores; which are not likely to locate in a Downtown environment). The retail component is generating $14.1 million or about $152.03 per occupied square foot. The restaurant component is only generating $632,000 or about $41.46 per square foot. While the restaurant sales per square foot is somewhat low, it is comparable to other rural Midwest communities. Using the above sales-per-square foot averages, the 29,850 square feet of vacancy that can be easily used by a retail or restaurant use represents an additional $1.2 million to $4.5 million in potential sales.

The primary opportunity for retail development in Downtown Cassville is for the City to attract new users of existing vacant space. However, other opportunities include encouraging existing businesses to expand their product lines to meet demonstrated unmet demand. There is a large amount of unmet demand shown for full-service restaurants. However, this may be due to the low restaurant sales per square foot.

There are some vacant spaces where the City could encourage new infill mixed-use development with retail on the 1st-floor. The City could 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 several retail sectors are not adequately served locally within the STA. This demand and lack of local supply is prompting shoppers to leave the STA to meet their retail needs beyond the Cassville area in places such as Joplin or Springfield, Missouri or Rodgers, Arkansas, as well as on the internet. Such unmet retail demand presents an opportunity for Downtown Cassville to capture more retail dollars.

Table 16 on Page 28 lists the retail areas for potential growth in Downtown Cassville. The retail goods and services are classified according to the North American Industry Classification System (NAICS) in industry groups. Categories such as Department Stores can demonstrate significant unmet retail demand; and this is the case in Cassville. However, due to today's market forces, it is unlikely that a department store would open in a downtown location. However, this unmet demand is worth noting as existing Downtown Cassville merchants may wish to add general department store goods to their existing product lines.

The primary opportunities for addressing unmet retail demand are shown below. These opportunities are shown in dollars as an amount of additional sales for the City, and include:

- Clothing Stores: $2.2 million
- Health & Personal Care Stores: $1.6 million
- Full-Service Restaurants: $1.5 million
- Office Supplies, Stationary, and Gift Stores: $750,000
- Sporting Goods/Hobby/Musical Instrument Stores: $710,000
- Special Food Services (catering, etc.): $370,000
- Drinking Places - Alcoholic Beverages: $340,000

The total demonstrated unmet demand for retail goods and services from Table 16 on page 28, removing Department Stores, shows that about $12.7 million dollars in additional sales for Downtown Cassville could be generated if vacant space was available. However, this amount of demand would require 121,500 square feet of space based upon the figures of $152.03 per retail square foot and $41.46 per restaurant square foot.

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

Another significant component that is missing in Downtown Cassville is not a retail market aspect. There are few residents located in Downtown. There is an ownership market surrounding Downtown, but few rental units exist in Downtown. The City should work to address this by encouraging upper-floor use and seeking developers of larger residential projects. By developing the residential market, all categories of retail and restaurant businesses will improve.

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

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Introduction

Downtown Cassville has a typical grid-pattern street layout with Main Street/Missouri Highway 37 providing the primary access. There is a traditional courthouse square setting, bounded by Main, West, and West 7th & 8th Streets. Most of the Downtown commercial retail is clustered around the square. However, other retail clusters exist to the south along Main Street in an area that is more vehicular in nature. The most prominent, and heavily traveled, intersection is located at Main Street/Business Route 37, and Highways 76, 112, and 248. The intersections of Main Street/Business 37 with 7th & 8th Streets are important to the Courthouse Square as they afford a view of the Downtown stores. Downtown is bound on the southeast by Flat Creek.

Along with the Courthouse, the Barry County Jail and Sherriff's Office is located a block east of Main Street on East Street. City Hall is located at the intersection of Main and West 3rd Streets and includes the Police Department. The Cassville Chamber of Commerce is located at the intersection of Main and West 6th Streets. Main Street/Business 37 is heavily traveled. The area near the Courthouse provides a more traditional Downtown feeling, while the area near the intersection of Main/ Highway 37, and Highways 76, 112, and 248 is more vehicular oriented. This results in a very open feeling just south of the core commercial area.

In order for Downtown to realize its potential as a retail area, it must appeal to businesses and attract an expanded retail market. DREAM seeks to increase the draw of Downtown and therefore the relevance of Downtown to the City as a whole.

In many instances, modern development trends have diminished the function of the typical American downtown. As consumers began to favor the use of the automobile, commercial development sought larger parcels of affordable undeveloped land further from the community's historic core. The automobile increased the mobility of the consumer, and increasingly shopping centers with major retailers located in more scattered developments along major roadways. Downtown Cassville has maintained a number of important civic and social service functions as the seat of local government, making it a frequent destination for residents.

Through the establishment of goals, strategies, and implementation steps, Downtown has an opportunity to build upon its positive aspects to drive upcoming potential projects, such as the Main Street improvements and 10th Street Park, forward. Sound planning strategies that seek to enhance the retail and restaurant market will help Downtown expand its role as a significant retail destination for the region.

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BACKGROUND & METHODOLOGY

This report takes a comprehensive approach to quantify the retail demand and supply for the trade areas in order to identify potential retail services that would be successful in Downtown. Recommendations have been developed regarding strategies to encourage appropriate retail development in Downtown Cassville. 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 Cassville DREAM Initiative activities, discussions were held with residents, business owners, and City staff. These various market segments each provide key insights into potential improvements to Downtown Cassville's retail services. Additionally, a thorough review of future residential demand for the trade area has been conducted in the Cassville DREAM Residential Demand Analysis from April of 2015. 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 Downtown 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 Downtown Cassville. Retail categories with unmet demand are evaluated against the community survey results and other economic and physical conditions of Downtown in order to develop a retail strategy.

LIMITS OF STUDY

The Retail Market Analysis is intended to provide a general forecast of the amount and types of retail development that could be supported in the trade area. The assumptions and projections used in the analysis are current and supported through the year 2020. The analysis is meant to provide general strategic direction for developing retail in Downtown Cassville. This study is not intended to be the sole basis for development decisions.

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TRADE AREA PROFILE

The "trade area" refers to the geographic area from which a majority of customers for a given business originate. Different retail business categories can have different trade areas. The trade area for a convenience store or hair salon might be quite small, whereas 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 (DTA), Primary Trade Area (PTA) and a Secondary Trade Area (STA). For the purposes of this study, the DTA is Downtown Cassville, the PTA is the Cassville City limit, and the STA includes any point within a 30-minute drive of Downtown. This drive-time boundary represents an acceptable catch-basin of consumers likely to make a shopping trip to Downtown Cassville, rather than to another community. A map of each area is included in Appendix A and the three areas are summarized below.

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

- Primary Trade Area (PTA): This study classifies the boundary of the City of Cassville as the PTA. Not only does the DTA draw the majority of its shoppers from the PTA, but it is useful to show the relationship between Downtown retail activity and citywide retail activity.

- Secondary Trade Area (STA): For the STA, the study uses a 30-minute drive-time around Downtown. Most consumers in this area are likely to travel to the PTA to shop and may be shopping in the DTA. Retail recommendations will focus on how the DTA can capture more of these consumers.

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

TRADE AREA DEMOGRAPHIC SNAPSHOT

In order to understand the trade areas that are the focus of this study it is important to understand their demographic composition.

When evaluating the demographics of a particular place, it is helpful to use a baseline with which to compare the data. An appropriate baseline for comparison of DREAM communities is data for the State of Missouri. Using the State of Missouri as a baseline provides an indication of positive or negative performance.

The following table highlights the estimated demographic snapshots for 2014 for Downtown Cassville, the PTA, the STA, and the State of Missouri. Some information in this analysis will be compared to information from the 2010 United States Decennial Census. However, Downtown and the STA do not coincide with whole census tracts. Data for these custom geographies should not be relied upon as precise figures, but rather as estimates extrapolated from local census tracts and the City of Cassville. For purposes of comparison, the demographic tables in this report use current 2014 estimates and 2019 projections as provided by a third-party demographic data supplier and based on U.S. Census data.

Table 1, below, indicates the Cassville area has a very small population with a slightly higher average household income than the PTA and STA; but a lower income than the State of Missouri. The median age in the Cassville trade areas is slightly older than the State median age, with Downtown Cassville being the oldest.

TABLE 1: 2014 DEMOGRAPHIC SNAPSHOT

	Downtown Cassville	PTA	STA	State of Missouri
Population	102	3,072	11,588	6,074,504
Median Household Income	$37,990	$31,418	$35,213	$45,900
Housing Units	23	1,406	5,127	2,772,423
Owner Occupied	13	801	3,163	1,649,089
Renter Occupied	6	391	1,264	770,812
Vacant Units	5	214	701	352,522
Median Age	41.4	40.3	39.4	38.4
19 and Under	24	777	3,130	1,554,724
20-44	31	933	3,452	1,971,039
45 and Over	45	1,363	5,008	2,548,741

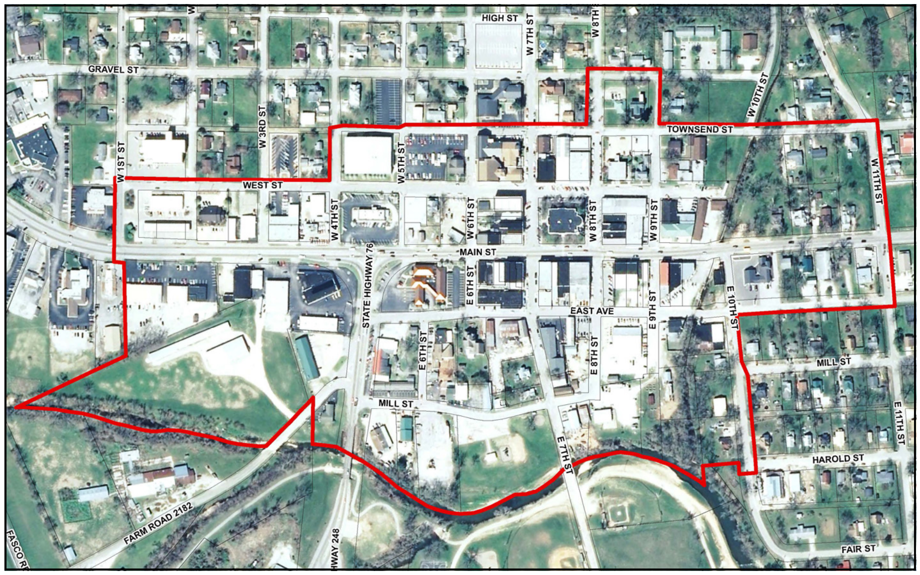
MARKET PROFILE/DEMOGRAPHIC TRENDS

DOWNTOWN CASSVILLE (DTA)

The DTA for Cassville (the area within the DREAM boundary) is roughly 66 acres and consists of about 32 city blocks (see Figure 1).

The 2010 Census showed 109 people lived Downtown in 20 occupied housing units. The median age was 40.4, with about 26% of the population being age 19 or younger, 30% between 20 and 44 years of age, and 44% age 45 years or more.

Figure 1: Downtown Cassville



The 2014 estimate for the population has decreased slightly with the number of housing units remaining the same. This trend is not expected to change unless the City can make a significant amount of housing units available; perhaps through development of a large mixed-use project. The number of vacant units may continue to increase.

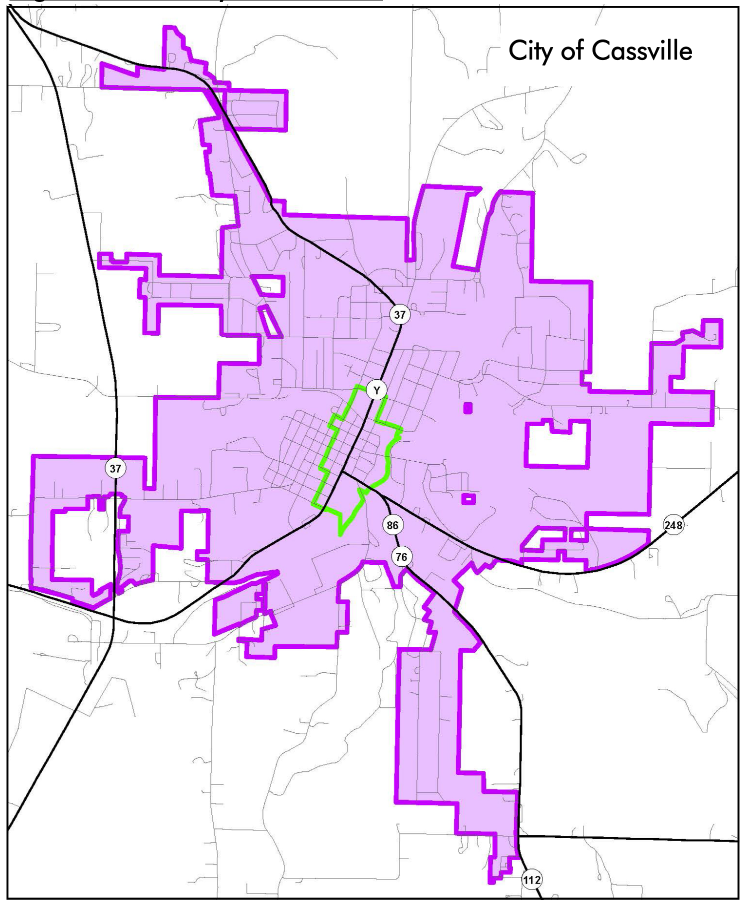
The following table illustrates current demographics and future demographic trends for the DTA.

TABLE 2: DOWNTOWN CASSVILLE

	2010	2014	2019	% Change '10-'14	% Change '14-'19
Population	109	102	96	-6.4%	-5.9%
Housing Units	23	23	23	0.0%	0.0%
Owner Occupied	14	13	12	-7.1%	-7.7%
Renter Occupied	6	6	5	0.0%	-16.7%
Vacant Units	3	5	6	66.7%	20.0%
Median Age	40.4	41.4	42.9	2.5%	3.6%
19 and Under	28	24	22	-14.3%	-8.3%
20-44	33	31	29	-6.1%	-6.5%
45 and Over	48	45	46	-6.3%	2.2%

PRIMARY TRADE AREA (PTA)

Figure 2: Primary Trade Area



The 2010 Census showed 3,266 people lived in the PTA (defined as the City limits of Cassville, as depicted in Figure 2) in 1,275 occupied housing units for an average of 2.6 persons per occupied unit. The median age was 40.5 with about 27% of the population age 19 or younger, 28% between 20 and 44 years of age, and 45% age 45 years or more.

Table 3 shows that the 2014 population estimate has declined since the 2010 Census. The number of housing units has remained approximately the same and this is expected to continue; with the number of vacant units increasing. The table also shows the median age is expected to increase slightly with the number of persons declining in all age cohorts by 2019.

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

TABLE 3: PRIMARY TRADE AREA

	2010	2014	2019	% Change '10-'14	% Change '14-'19
Population	3,266	3,072	2,928	-5.9%	-4.7%
Housing Units	1,402	1,406	1,410	0.3%	0.3%
Owner Occupied	851	801	769	-5.9%	-4.0%
Renter Occupied	424	391	363	-7.8%	-7.2%
Vacant Units	127	214	278	68.5%	29.9%
Median Age	40.5	40.3	40.9	-0.5%	1.5%
19 and Under	883	777	733	-12.0%	-5.7%
20-44	923	933	862	1.1%	-7.6%
45 and Over	1,460	1,363	1,331	-6.6%	-2.3%

SECONDARY TRADE AREA (STA)

The 2010 Census showed an estimated 11,664 people lived in the STA (refer to Figure 3) in 4,475 occupied housing units for an average of about 2.6 people per occupied housing unit. The median age was 38.9 with about 29% of the population age 19 or younger, 29% between 20 and 44 years of age, and 42% age 45 years or more.

Figure 3: Secondary Trade Area

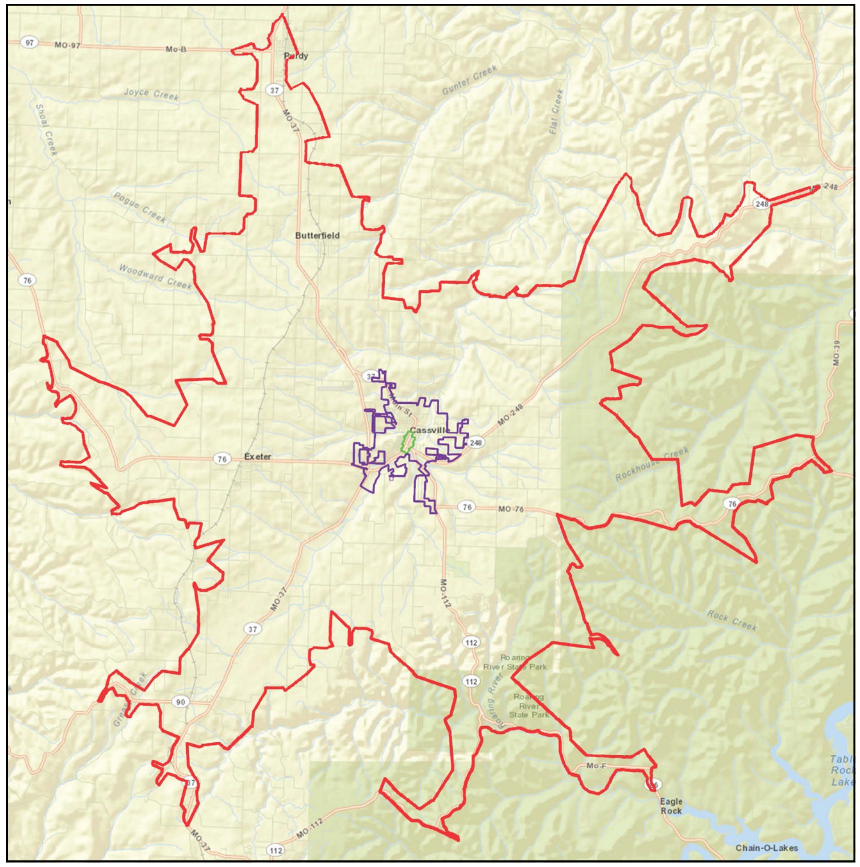


Table 4 shows that the 2014 population estimate is declining slightly and that trend is expected to continue. However, the table shows moderate growth in the number of housing units along with an increasing number of vacant units. The median age is expected to climb slightly, along with an increase in the 45 and over age cohort.

The following table illustrates current demographics and future demographic trends for the STA:

TABLE 4: SECONDARY TRADE AREA

	2010	2014	2019	% Change '10-'14	% Change '14-'19
Population	11,664	11,588	11,500	-0.7%	-0.8%
Housing Units	5,047	5,127	5,202	1.6%	1.5%
Owner Occupied	3,208	3,163	3,140	-1.4%	-0.7%
Renter Occupied	1,267	1,264	1,246	-0.2%	-1.4%
Vacant Units	572	701	816	22.6%	16.4%
Median Age	38.9	39.4	39.9	1.3%	1.3%
19 and Under	3,378	3,130	3,027	-7.3%	-3.3%
20-44	3,336	3,452	3,399	3.5%	-1.5%
45 and Over	4,950	5,008	5,075	1.2%	1.3%

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 '14-'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 a decrease in the population across all of the Cassville trade areas. The median age of Downtown is outpacing the aging of the State of Missouri, with the PTA and STA experiencing age increases about the same as the State. Overall, these trends point to a shrinking, and aging population. Cassville leaders need to take action to attract residents to the City and reverse these regional trends.

TABLE 6: DEMOGRAPHIC COMPARISON

	Population % Change		Median Age Change (in years)	
	'10-'14	'14-'19	'10-'14	'14-'19
Downtown	-6.4%	-5.9%	1.0	1.5
PTA	-5.9%	-4.7%	-0.2	0.6
STA	-0.7%	-0.8%	0.5	0.5
State	1.4%	2.0%	0.6	0.6

Table 7, below, gives a comparison of age demographic trends in terms of the percentage of increase or decrease. The Downtown population is only expected to see growth in the 45 & Over age cohort and that growth is expected to still lag behind the State. The PTA is projected to lose population at a greater rate than the State in all age cohorts, but is expected to fare slightly better than Downtown in the 19 & Under cohort. The STA again lags the State, but is projected to lose less population by percentage than Downtown and the PTA in the younger cohorts, with a slight gain in the 45 & Over group; although not as much of a gain as Downtown.

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
Downtown	-14.3%	-8.3%	-6.1%	-6.5%	-6.3%	2.2%
PTA	-12.0%	-5.7%	1.1%	-7.6%	-6.6%	-2.3%
STA	-7.3%	-3.3%	3.5%	-1.5%	1.2%	1.3%
State	-2.9%	0.7%	1.7%	0.1%	4.0%	4.3%

Table 8, below, provides a comparison of housing units in the trade areas. Although the table shows that Downtown has seen no increase in the overall number of units, the sample size is very small for Downtown. The PTA and STA have seen little growth in the overall number of housing units. The number of vacant housing units is growing significantly faster than the State average. This is indicative of people moving away from the Cassville market areas.

TABLE 8: TRADE AREA HOUSING UNITS COMPARISON

	Housing Units Change	Owner Occupied Change	Renter Occupied Change	Vacant Unit Change
	'14-'19	'14-'19	'14-'19	'14-'19
Downtown	0.0%	-7.7%	-16.7%	20.0%
PTA	0.3%	-4.0%	-7.2%	23.0%
STA	1.5%	-0.7%	-1.4%	14.1%
State	2.4%	2.1%	2.3%	3.5%

HOUSING MARKET ANALYSIS SUMMARY

For Downtown to have a healthy retail district, it is important that there are residents living within walking distance of Downtown businesses. These residents provide a regular customer base for retailers and give Downtown a 24-hour population. This continuous presence provides life on the sidewalks and keeps a watchful eye on Downtown when businesses are closed.

The DREAM process conducted a Residential Market Analysis in March of 2015 that projected residential demand for Cassville, with a focus on Downtown. The analysis concluded that Cassville is demonstrating very little housing demand at this time. The City, and Downtown could benefit from developing or adjusting existing units that appeal to residents age 55 and over. Other housing initiatives should center on improving housing conditions, developing positive relationships and networks with local housing developers, and addressing Cassville's economic challenges to help increase the City's visibility and overall activity.

The benefits of increasing Downtown residential units 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 the core of the City, and creating ideal conditions for extended business hours and additional businesses. Through continued code enforcement and investment in infrastructure, the City can improve and preserve the neighborhoods surrounding Downtown. This will encourage continued reinvestment by existing private property owners and will attract new construction. Improving the conditions in the Downtown 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 Downtown Cassville's businesses in the future. The City can address customer needs and implement a plan that increases Downtown's ability to provide needed services to these segments. The broad Downtown consumer segments reviewed for Cassville include:

Downtown Employees

- As shown in table 9 on page 19, Downtown is home to about 515 employees and 85 businesses.
- This segment's impact on Downtown retail can be estimated as follows:
  515 x $10 weekly = about $265,000 annually.
- This segment has a large demand for restaurants and food services.
- Additionally has need for convenience items during work commute.
- This segment often responds to frequent and repeat business promotions.
- Downtown businesses should seek to develop strategies to keep and serve this market in Downtown without the need to drive to other locations.

Downtown Residents

- Only 109 residents, as shown in the 2010 Census, live in about 20 households in Downtown Cassville; this is an extremely 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.

Cassville Residents

- This is a larger segment than Downtown Residents, with the PTA population of 3,266 shown in the 2010 census. However, this segment is currently estimated at 3,072 for 2014 and is projected to decline to 2,928 by 2019; making this a shrinking market for Downtown businesses.
- 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.
- Downtown residents are critical for Downtown merchants as they are most likely to have higher rates of impulse spending and a need for purchasing daily necessities due to high frequency of visits.
- Effective strategies for this segment can be to inspire store loyalty through targeted marketing and customer incentives and by providing expanded product selection for daily and weekly necessities.

Tourists - Visitors

- Visitors tend to look for unique experiences and products.
- This segment has a 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 also include effectively developing and marketing the Downtown brand as a unique experience worthy of a visit.

COMMUNITY INPUT

The DREAM Initiative worked with the Cassville Main Street Association (CMS) to gather information about residents' perceptions and desires for Downtown. Focus groups were conducted and supplemented with ongoing interviews with Downtown stakeholders. Participants in the focus groups indicated what they liked or did not like about Downtown and gave suggestions on what should be prioritized to make Downtown more appealing. The focus groups convened included two groups of Business Owners and City Residents, and a group that consisted of City Staff.

Summarized comments regarding retail development included:

- Participants characterized Downtown Cassville as "tired", "dull", and "uninteresting" and felt that a cohesive design theme and improved building façades were important enhancements for Downtown to succeed.
- Participants indicated they tend to do everyday shopping in Cassville, although not necessarily Downtown.
- Some participants indicated they shop online or travel to Joplin or Springfield, Missouri or Rodgers, Arkansas for greater variety. They also noted that lack of shopping variety and Downtown business hours are reasons they do not shop Downtown.
- Participants felt that Downtown has been stagnate. The groups expressed optimism about the City, but also noted on numerous occasions that there are few good paying jobs in the region, little residential growth, and no visitor draw beyond the natural beauty of the area.
- Participants listed a number of dining options and stores selling sporting goods, art and craft supplies, art galleries, baked goods, agricultural goods, hardware items, and shoes as types of retail businesses they would like to see locate Downtown.
- Participants felt that some major issues facing Downtown included parking, wayfinding and navigation, and business hours.

Information from the Focus Groups will help in determining what adjustments to the Downtown Cassville retail mix could be effective. Strategies are formed to help Downtown develop greater appeal to nearby residents who most frequently use it and have the greatest potential for spending their disposable income. An effective strategy will capitalize upon the existing consumer base, while attempting to attract additional consumers and new retail businesses.

Business Market

The City of Cassville has a limited economy at this time. Table 9, below, illustrates the total estimated employment in 2014, for the Cassville trade areas, while Table 10 provides a listing of several of Cassville's largest employers.

TABLE 9: 2014 TOTAL EMPLOYMENT

	Downtown Cassville	PTA	STA
Employees	515	2,538	4,340
Businesses	85	365	737

Source: ESRI Business Analyst

TABLE 10: CASSVILLE AREA EMPLOYERS

Employer	Business Type	Employees
George's Poultry	Processing Plant	1,000
Fasco / Regal Beloit	Manufacturing - Electric Motors	330
Justin Boot	Manufacturing - Boots	280
Cassville R-IV Schools	Education	250
Mercy Healthcare, Cassville	Healthcare	130
MARCK Recycling	Corporate Office - Recycling	130
Arning Companies	Manufacturing - Awnings / Canopies	90
Hutchens Construction	Construction / Asphalt	89
Able 2	Manufacturing - Lights and Sirens	87
Barry County	Government	80
City of Cassville	Government	28

Source: Cassville Chamber of Commerce

COMPARATIVE MARKET ANALYSIS

Businesses in Downtown Cassville draw customer from the local employee base. The City is the Barry County Seat and serves as a hub for employment and business activity. Along with a number of local businesses and churches, there are several public uses in the Cassville region that attract customers, including:

- Barry County Courthouse
- Cassville City Hall and Police Department
- Barry County Jail and Sherriff's Office
- Cassville Chamber of Commerce

Additionally, there are a number of institutional and recreational uses that also bring visitors to the area, including:

- Barry County Museum
- City Park
- Cassville Greenways
- Cassville Branch of the Barry-Lawrence Regional Library
- Crowder Community College
- Roaring River State Park
- Cassville Aquatic Center
- Mark Twain National Forest

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 Downtown parcels of land are being used. Table 11, on the following page, identifies a total of 111 parcels on which are located about 132 primary buildings that represent approximately 469,200 square feet of first-floor space. Thirty-six of these buildings were identified as retail and restaurant uses, representing about 119,400 square feet of space. About 11,700 square feet of the retail and restaurant space was vacant. Table 11 also identifies 50 office and service buildings along with 5 mixed-use structures that represent about 198,700 square feet of space with about 18,150 square feet of vacancy. Overall, 29,850 square feet of Downtown space is vacant and suitable for easy conversion to retail use; with another 7,400 square feet of industrial vacancy that might be able to be converted to retail use. As noted, there are few residents and residential units.

Table 11 also indicates the overall composition of the existing occupied square footage in Downtown Cassville. Existing Downtown land-use is composed primarily of office/ service space (35%), followed by retail space (22%), public/institutional space (22%), industrial space (7%), mixed-use space (7%), restaurant space (4%), and residential spaces (4%). Retail and restaurant uses are critical to establishing a vibrant Downtown atmosphere. However, in Downtown Cassville, non-retail/restaurant uses account for 68% to 75% of the available space, depending on the uses comprising the mixed-use category. This imbalanced situation may require the City of Cassville to review its zoning code and take aggressive action to preserve prime, first-floor spaces for retail and restaurant use.

Additionally, the City could encourage the conversion of existing office/service spaces into retail and restaurant space. However, the total commercial vacancy of 29,850 square feet that could be used by retail and/or restaurant uses provides the immediate opportunity to attract new tax-generating uses to Downtown. Furthermore, the City should consider focusing on developing residential units and restaurant space; two vibrant, complementary uses that are nearly non-existent in Downtown Cassville.

TABLE 11: LAND USE TOTALS & SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Residential					
Single-Family	10	9	15,259	0	0.0%
Multi-Family	1	2	2,441	0	0.0%
Sub-Total	**11**	**11**	**17,700**	**0**	**0.0%**
Commercial					
Office / Service	35	50	164,418	15,500	9.4%
Retail	23	30	97,936	5,500	5.6%
Restaurant	5	6	21,449	6,200	28.9%
Sub-Total	**63**	**86**	**283,803**	**27,200**	**9.6%**
Mixed-Use	7	5	34,251	2,650	7.7%
Industrial	13	15	37,436	7,400	19.8%
Public / Institutional	10	15	95,975	0	0.0%
Park / Recreation	2	NA	NA	NA	NA
Vacant Lot	7	NA	NA	NA	NA
TOTAL	**111**	**132**	**469,165**	**37,250**	**7.9%**

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

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MARKET RESEARCH FINDINGS

RETAIL ANALYSIS

A review of market conditions provides an idea of the possible new and existing business potential for Downtown Cassville. As noted, Downtown contains about 318,100 Square feet of existing first-floor non-residential space that includes:

- 21,500 square feet of restaurant space (6,200 square feet vacant)
- 97,900 square feet of retail space (5,500 square feet vacant)
- 164,400 square feet of office/service space (15,500 square feet vacant)
- 34,300 square feet of mixed-use space (2,650 square feet vacant)
- Additionally, there is 7,400 square feet of vacant industrial space that could be adapted for a retail use.

Data shows that the overall retail/restaurant space is generating about $14.7 million in annual sales (sales do not include auto dealers, gasoline stations, or non-store retailers and grocery stores; which are not likely to locate in a Downtown environment). The retail component is generating $14.1 million or about $152.03 per occupied square foot. The restaurant component is only generating $632,000 or about $41.46 per square foot. While the restaurant sales per square foot is somewhat low, it is comparable to other rural Midwest communities. Using the above sales per square foot averages, the 29,850 square feet of vacancy that can be easily used by a retail or restaurant use represents an additional $1.2 million to $4.5 million in potential sales.

Figure 4: Downtown Cassville Annual Sales

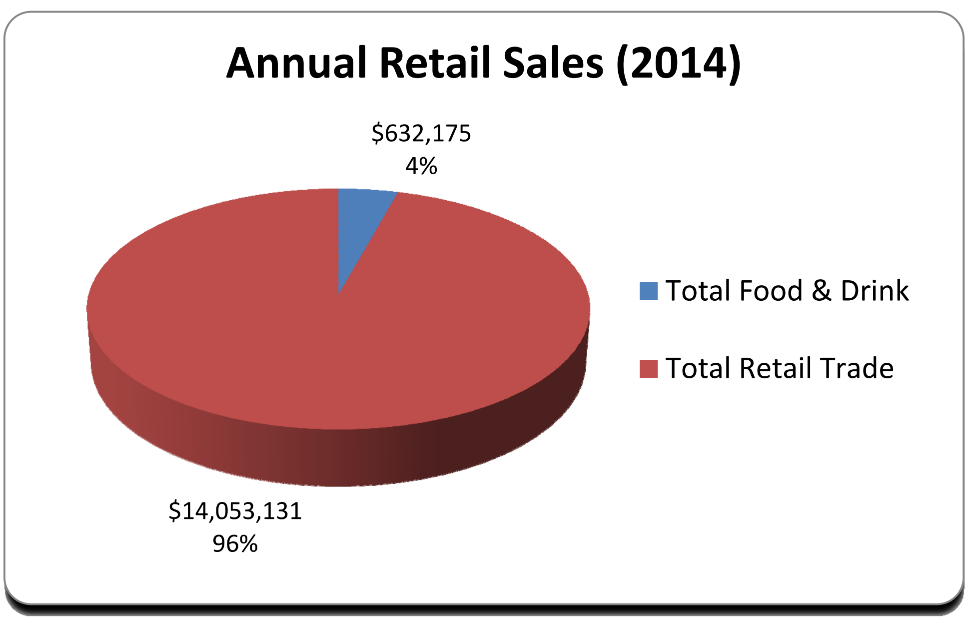

Table 12, below, provides a breakdown of some of the retail establishments in Downtown Cassville, the PTA, and the STA that are currently productive in generating sales. Table 13, on the following page, provides a specific sampling of some of the main Downtown businesses. The retail services listed in tables 12 and 13 are organized according to the North American Industry Classification System (NAICS) to allow for comparison of retail activity by sectors or categories. Recommendations can then be developed to address any gaps in retail service. Due to differences in allocating businesses to various categories, these tables may not match completely. The tables also are meant to provide indicative information of business types rather than a thorough listing of every Downtown business in these categories.

TABLE 12: RETAIL ESTABLISHMENTS

	Downtown Cassville		Primary Trade Area		Secondary Trade Area	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
TOTAL (Pedestrian-generating businesses):	16	109	81	923	126	1,061
Furniture & Home Furnishings Stores	1	4	5	15	7	20
Electronics & Appliance Stores	1	5	6	19	6	19
Bldg. Materials & Garden Equipment & Supplies	1	4	3	256	6	271
Food & Beverage Stores	1	20	6	66	11	81
Health & Personal Care Stores	1	7	6	30	6	30
Clothing & Clothing Accessories Stores	1	3	3	11	5	14
Sporting Good, Hobby, Book & Music Stores	0	1	2	5	5	10
General Merchandise Stores	1	40	3	321	3	315
Miscellaneous Store Retailers	3	6	16	37	26	61
Arts, Entertainment & Recreation	2	2	8	10	17	33
Accommodation	0	0	1	11	8	32
Food Services & Drinking Places	4	17	22	142	26	175
Total Businesses (including non-retail)	85		365		737	
Total Employees (including non-retail)	515		2,538		4,340	
Total Residential Population	102		3,072		11,588	
Employees/Population	5.05		0.83		0.37	

Source: ESRI Business Analyst

TABLE 13: EXISTING RETAIL

NAICS Industry Group	Store Name
Automotive	Fasttrip
	Jump Stop
Furniture & Home Furnishings Stores	Packwood Furniture
	Unique Cross Grains
	Westco Home Furnishings
Electronics & Appliance Stores	ALTEK
	Bob's Discount Appliance
	The Computer Shop
	Russel Cellular
Jewelry, Luggage, and Leather Goods Stores	Tomblin's Jewelry & Gifts
Clothing Stores	Pink Zebra Boutique
	Diva's Bling
	Gussied Up Boutique
	Destiny's Clothing
Bldg Materials, Garden Equip. & Supply Stores	Le Comptes Building Supply
Health & Personal Care Stores	Sater Pharmacy
	Whitley's Pharmacy
General Merchandise Stores	Dollar General
Miscellaneous Retailers	Video Mart
	Papa Vapors
Florists	Designs by Debbie
Office Supplies, Stationery, and Gift Stores	Copy Cat
	Forever Yours Embroidery & Gifts
	Whitley's Gifts & More
Used Merchandise Stores	NU-2-U
	Granny's Olde Home Place
Food Services & Drinking Places	BBQ Station
	China Express
	Cro-se Café
	Sunrise Family Restaurant

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

TABLE 14: CONSUMER EXPENDITURES

	Downtown Cassville	Primary Trade Area	Secondary Trade Area
Median Household Income	$37,990	$31,418	$35,213
Average Annual Household Expenditures for Selected Retail Sectors			
Food	**$5,717**	**$5,200**	**$5,454**
Food at Home	$3,575	$3,292	$3,446
Food Away from Home	$2,142	$1,908	$2,007
Apparel and Services	**$974**	**$845**	**$869**
Household Merchandise	**$1,319**	**$1,297**	**$1,342**
Electronics	$263	$354	$364
Household Goods	$1,055	$943	$978
Household Care	**$1,974**	**$1,781**	**$1,819**
Transportation and Travel	**$4,166**	**$3,782**	**$3,988**
Transportation	$3,250	$3,007	$3,210
Travel	$916	$775	$779
Health & Personal Care	**$1,335**	**$1,259**	**$1,333**
Health Care	$554	$516	$537
Personal Care Products	$781	$743	$796
Entertainment & Recreation	**$2,076**	**$1,891**	**$1,953**
Total for Selected Sectors	**$17,560**	**$16,055**	**$16,759**

Source: ESRI Business Analyst

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 that Downtown spends slightly more on food away from home, apparel, household care, household goods, and travel than the PTA and STA do. Downtown spends slightly less on food at home, electronics, transportation, and personal care products than the PTA and STA do. However, none of these variances is significant. Downtown is demonstrating the highest household income and spends the highest overall total for these expenditures.

Table 15, on the following page, suggests Cassville's potential purchasing power by providing the 2014 estimate of the number of households at regular income thresholds. Table 15 shows a wide range of income levels for the small sample size of Downtown households. Most of the households in the PTA and STA are demonstrating household incomes of less than $35,000 annually.

Determining the retail sectors that have unmet demand, and that will appeal to the higher-income residents found in the PTA and STA, is a critical step for Downtown Cassville revitalization.

TABLE 15: HOUSEHOLD INCOME (2014 Estimated)

Income Level	Downtown Cassville	Primary Trade Area	Secondary Trade Area
Less than $ 15,000	3	270	779
$ 15,000 - $24,999	3	177	727
$ 25,000 - $34,999	3	210	691
$ 35,000 - $49,999	2	165	749
$ 50,000 - $74,999	4	194	833
$ 75,000 - $99,999	2	99	377
$ 100,000 - $149,999	1	46	156
$ 150,000 - $199,999	1	24	86
$ 200,000 +	0	9	27
Total	19	1,194	4,425

Source: ESRI Business Analyst

POTENTIAL STORE SPACE SUPPORTED

Downtown businesses draw upon the City of Cassville's trade area. Although many consumers are getting their retail needs met within the STA, there are some categories of retail products that are demonstrating unmet demand. This may indicate that residents are shopping outside the STA or PTA for these products in nearby markets such as Joplin or Springfield, Missouri or Rodgers, Arkansas. Some retail demand is also likely being met through internet purchases. The categories demonstrating unmet retail demand present an opportunity for existing or new merchants to locate Downtown and capture sales being made outside of the PTA or STA.

Table 16, on page 28, shows the retail categories that are demonstrating unmet retail demand (the difference between retail demand and actual sales) for Downtown Cassville. The Analysis considers the total unmet retail demand within the STA and the average retail sales per square foot ($152.03) and the average restaurant sales per square foot ($41.46). While the table indicates that Downtown could support an estimated 121,500 square feet of retail/restaurant space, this number is inflated by the department store use, which is not likely to locate in a downtown environment due to today's retail market forces. Removing the demand shown for this use leaves a total of about 94,900 square feet. This amount of square footage is still not likely to be met completely by Downtown Cassville alone.

While unmet demand in some categories is too small to support a store, existing retailers could also capture some of the unmet demand in these categories by expanding their floor area and adding new products, or the City could work to attract new retailers to existing Downtown vacancies.

TABLE 16: FUTURE RETAIL GROWTH

Industry Group	Opportunity[1]	Potential Retail Area (sq.ft.) Supported[2]
~~Department Stores Excluding Leased Depts. (NAICS 4521)~~	~~$ 4,043,268~~	~~26,595~~
Clothing Stores (NAICS 4481)	$ 2,188,037	14,392
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$ 1,555,904	10,234
Full-Service Restaurants (NAICS 7221)	$ 1,455,134	35,100
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$ 746,225	4,908
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$ 711,427	4,679
Shoe Stores (NAICS 4482)	$ 642,221	4,224
Special Food Services (NAICS 7223)	$ 369,928	8,923
Drinking Places - Alcoholic Beverages (NAICS 7224)	$ 339,897	8,199
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$ 226,516	1,490
Specialty Food Stores (NAICS 4452)	$ 179,133	1,178
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$ 152,066	1,000
Book, Periodical, and Music Stores (NAICS 4512)	$ 86,492	569
TOTAL:	**$12,696,248**	**121,493**
ADJUSTED TOTAL:	**$8,652,980**	**94,898**

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

[2] Based on $152.03 in retail sales per square foot, $41.46 in restaurant sales per square foot, and existing retail building inventory and activity in Downtown Cassville.

Table 16 also shows that there is more possible retail space needed (94,900 square feet) than there is current vacant space available that is easily converted to retail (29,850 square feet from Table 11 on page 21). Including the vacant industrial space (7,400 square feet) that could be converted by an innovative developer for certain retail uses increases the total available vacancy to 37,250 square feet; still not enough to meet potential unmet demand. This shortage of retail space suggests that Downtown Cassville could develop added retail locations and that existing merchants could absorb some of this demand. Additionally, the City could encourage office and service uses to relocate to upper-floors and side streets; reserving prime 1st-floor spaces for retail uses.

Other conclusions that are drawn from Table 16, include:

- In the focus groups, participants identified various forms of dining, primarily casual, as one of the most desired new businesses. The sales data provided in this retail analysis supports that there is existing unmet demand for full-service restaurants and other food services. However, the very low existing restaurant sales per square foot may be an indicator that the area's household income will not support a higher restaurant sales number. The City and CMS should consider ways to strengthen sales and service at existing restaurants. Additionally, a restaurant will be more successful in close proximity to a vibrant residential market. If more residential units can be developed in, or near, Downtown, the potential sales opportunities for restaurants will increase.

- As noted, the retail sector of “Department Stores” is demonstrating unmet demand. The retail gap in this sector is noteworthy because it may indicate an opportunity for existing merchants to adjust their product lines to carry department store types of goods.

- “Clothing Stores” are demonstrating a large amount of unmet 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 store to a larger anchor store.

- 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. The unmet demand in this category may suggest that existing pharmacies are not providing all of the products they could. Smaller stores of this type can occupy existing locations, while a larger store has the potential to become a Downtown anchor.

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

- The retail sector of “Sporting Good/Hobby/Musical Instrument Stores” is demonstrating unmet demand. This is a category with products, particular certain types of sporting goods, that may easily fit into the existing vacant industrial spaces. These types of stores may need larger showrooms and higher ceilings than other retail stores.

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

- Stores selling products in the categories of "Specialty Food Stores", "Electronics & Appliances", and "Books, Periodicals, and Music Stores" are all demonstrating little unmet retail demand. While there may be opportunities for existing merchants to expand into these categories, new stores may find sales flat.

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

AVAILABLE RETAIL SPACE INVENTORY

The vacant properties identified in Downtown Cassville are shown on the following page on Table 17, and on the 1st Floor Vacancy Map in Appendix D. Some Downtown Cassville buildings have vacancies. Most of the current vacancies are under 3,000 square feet with the largest being 8,500 and the smallest 1,000. The average available existing vacant space in Downtown Cassville is 3,100 square feet.

In matching the vacant storefronts with the types of businesses demonstrating unmet retail demand, this report considers the size, geographic location, condition, and proximity of the vacancy to similar businesses. Table 17 also lists the retail suggestions for each vacant space that might work for Downtown Cassville. These are suggestions and are not the only solution to filling Downtown vacancies.

TABLE 17: POTENTIAL NEW RETAIL

ID	Address	Available Sq.Ft.	Potential Retail
1	308 Main Street	1,500	Jewelry, Luggage, Leather Goods
2	107 Main Street	1,900	Shoe Store
3	313 Main Street	2,650	Office Supplies
4	100 East 7th Street	1,000	Bakery
5	102 East 7th Street	8,500	Restaurant / Microbrewery
6	501 Mill Street	4,000	Restaurant
7	101 East 7th Steet	2,600	Clothing Boutique
8	809 Main Street	3,900	Restaurant
9	911 Main Street	1,600	Clothing Boutique
10	1 East 9th Street	2,200	Bar & Grill
11	907 East Avenue - Industrial	3,700	Sporting Goods Store
12	907 East Avenue - Industrial	3,700	Sporting Goods Store
	TOTAL:	37,250	

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Downtown Cassville Retail Goals

- Encourage Downtown housing

  The City of Cassville has a fairly stable economy. However, Barry County is only experiencing slight residential growth and none of that is projected in Cassville or Downtown. There are few existing residents and residential units in Downtown Cassville. Downtown residents provide a consumer market for Downtown businesses, a 24/7 population to increase safety, and a vibrant atmosphere for the area overall.

  The typical downtown revitalization housing cycle begins with high-quality rental units that appeal to higher-income residents and eventually transition into ownership. There are some existing buildings where rental units could be developed on upper-floors, but it is critical that the City insist on larger, high-quality, loft-type apartments. Additionally, there are some vacant lots and buildings that could be adapted for residential use.

- Develop existing business support programs

  The Cassville Main Street Association (CMS) should collaborate with the City and Chamber to strengthen the City's economic base through retention, expansion, attraction, and development of primary jobs and capital investments. While the City and Chamber will have a broader focus, CMS should work to promote existing businesses and host Downtown events. These groups should coordinate efforts to provide services that will help existing Cassville retailers succeed and grow. Programs focused on improving business operations could take the form of seminars that seek to educate and inform retail business owners about product differentiation, product presentation, window displays, and importance of hours and days of operation, and how service and quality of product differentiate them from big box or franchise stores. Additionally, seminars addressing marketing, customer service, business and building maintenance, and retail opportunities and trends should also be included. Existing store owners could adjust their products and services to meet some of the unmet demand being demonstrated.

  Some of Downtown's retailers have been in business for many years and could benefit from networking with other operators, fresh ideas, information regarding the changing markets of Cassville, and a support structure with which to discuss their issues and needs. CMS should be involved in all strategies as the lead Downtown organization.

- ENCOURAGE TARGETED USES TO ADJUST THE BUSINESS MIX

  Downtown stakeholders should encourage targeted retail uses and appropriate pedestrian generating activities on the ground floor of all mixed-use and commercial buildings. The City should develop a list of targeted retail uses based on Table 16. The focus of business attraction activities should be in drawing the appropriate mix of retail uses that might be successful. Integrating this program with specific marketing and promotion strategies could allow the City to fill the existing vacant 1st-floor space and generate excitement with residents and customers. It is important to monitor existing Downtown businesses and available storefronts to track the overall store mix in Downtown. The City should continue to work with CMS and the Chamber to market vacancies and try to fill them with stores from the targeted retail list. CMS should also develop and maintain information about Downtown vacancies. Downtown has an opportunity to cater to shoppers and diners seeking a more nostalgic atmosphere than what they can find on the outskirts of town.

- IMPROVE THE QUALITY OF SALES IN EXISTING RESTAURANTS

  The sales per square foot of restaurants in Downtown Cassville could be improved. The $41.46 per square foot for restaurant sales being demonstrated is very low and suggests the existing Downtown restaurants are selling primarily low ticket meals. This situation may be in part due to local alcohol sales restrictions. Full-service Downtown restaurants must be able to serve alcohol with meals. The goal for Downtown restaurants is to complement the retail store mix to create an overall pedestrian destination that people visit for many reasons. Improved retail stores and products will benefit Downtown and all markets. The collaboration of the City, CMS, and Chamber should encourage Downtown restaurants to focus on aesthetics and higher-quality services to attract a variety of customers in an effort to develop stronger sales.

- ENCOURAGE THE DEVELOPMENT OF SPACES BETTER SUITED TO RETAIL USES

  Some of the available properties in Downtown Cassville are not appealing to retail uses or are located away from the main traffic areas. Additionally, there are several buildings occupied by institutional uses or service/office businesses. This practice takes revenue generating retail properties off the market and can erode the City's tax base. This condition, when combined with a low sale-per-square foot, such as restaurants as discussed in the previous goal, severely hampers the ability of Downtown to generate taxable income.

Improvements to the building stock, with a focus on retail development, should enhance conditions and improve property values in Downtown. The City should also monitor the mix of businesses in Downtown to ensure a variety of activities, that will have broad appeal.

- CULTIVATE LOCAL ENTREPRENEURS

  As Downtown works to keep first-floor locations occupied with retail stores, efforts should also be made to identify and cultivate new retailers from within the community. CMS and the 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.

- ENCOURAGE EXISTING RETAIL EXPANSION

  It is important to understand that consumers will travel greater distances for a better choice in variety. With Cassville's proximity to the wide variety of products offered in Joplin or Springfield, Missouri or Rodgers, Arkansas, as well as on the Internet, it is critical that Downtown demonstrate a good variety of entertainment, shopping, and dining options. Downtown can broaden its retail variety by encouraging existing retailers to address categories of unmet demand as identified in Table 16 on page 28. These areas represent opportunities for local businesses to expand sales floors or add product lines.

- CREATE DOWNTOWN EVENTS

  Downtown Cassville should develop events to raise its visibility as a shopping and entertainment destination. The existing Farmer's Market is a good example of such an event and has proved successful. 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 Cassville area restaurants. An event with alcohol should always include food and end earlier in the evening.

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Downtown Cassville Strategies

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

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

Great Streets Equal Great Downtowns

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

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

Downtowns should have mixed land uses and extensive pedestrian amenities. Downtowns should have people of all ages moving throughout the district and should have unique identifiable areas such as outdoor seating, water features, and public art. 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 downtown's 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 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

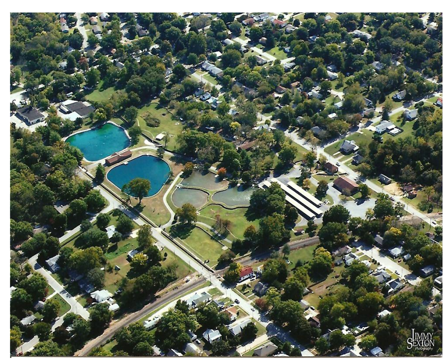
Public spaces and plazas are important components to successful downtown destinations. Many public areas suffer from lack of funding, maintenance, and planning. Public space revitalization, similar to properly maintained facades and streetscapes, have a direct impact on a downtown's economic, environmental,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

Downtown Environment & Appearance

Downtown Cassville'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 Downtown revitalization.

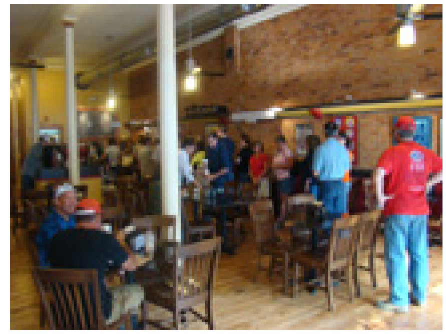
The public and private sectors must continue their partnership to preserve and enhance an environment in which retail can thrive. This will require various means of creative cooperation amongst City staff, and private business and property owners to maximize the impact in Downtown Cassville. New public sector mechanisms such as a Community Improvement District (CID) should be considered. Public improvements should be aimed at inducing private investment in buildings and sites as part of a comprehensive physical revitalization program. The following items should be Cassville's priorities:



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

Business Retention, Expansion, & Recruitment

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



The Cassville Main Street Association (CMS) should work with the City and Chamber to develop an economic development program focused on Downtown Cassville. Such a program would help to attract new retail uses and encourage existing merchants to improve the quality of their goods and services.

The collaboration of the above groups to provide economic development services should also monitor Downtown vacancies. A vacant lot and space inventory listing should be developed and include suggestions of the type of business for which an available space is best suited. Listings should also be available online and appropriate buildings submitted to websites such as www.locationone.com. The Chamber and CMS could also develop a listing of target businesses to contact. This listing should be limited to retail, restaurants, or unique services for Downtown. Incoming businesses and investors will also find an up-to-date list of local bankers and real estate agents very helpful when they inquire about Downtown. 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 Downtown businesses. 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 Cassville. Small businesses are the core of many local economies and can generate significant job growth and revenue. Downtown locations are, by nature, less costly to a small-business startup than a newer location. Additionally, a chain store or big box store is typically not interested in the smaller confines of a downtown location.

CMS should again collaborate with the City and Chamber to identify local entrepreneurs. Through programs such as www.operationjumpstart.biz, Downtown leaders can assist business start-ups and help connect aspiring business owners with financial and technical resources. The Chamber and CMS can also provide seminars to help entrepreneurs write effective business plans that financial partners will want to read and help existing small businesses compete with big box stores and internet sales.

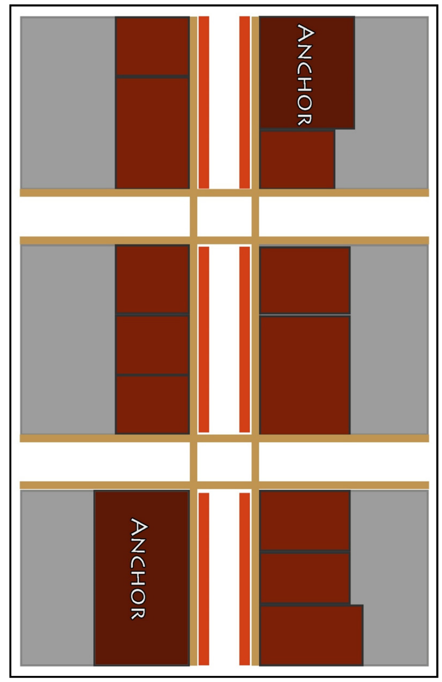
Limit Non-Retail Use

The appropriate mix of retail is a key to Downtown Cassville's success. A well developed mix of uses will generate pedestrian traffic. Too often the main retail strip in a downtown demonstrates an overabundance of service-oriented uses. These businesses are important to the local economy, but may take up valuable sales tax revenue-generating retail space. Some DREAM focus group participants suggested Downtown should focus on service businesses. While such a strategy could be effective as a section of a downtown in a larger community, Downtown Cassville must preserve its 1-st floor space for retail, tax revenue generating uses.

The City should focus efforts on creating and maintaining a continuous retail loop around the courthouse square in Downtown Cassville. As noted, the 1st-floor spaces on all of the streets around the square should be reserved for retail or restaurant establishments. Pedestrian loops can extend from the square to encourage a walk of about one-quarter mile in length or a five to ten minute stroll along Main Street. However, it is important to note the vehicular nature of Main Street may conflict with these pedestrian loops.

Anchors are large, well-known attractions that draw many customers. Anchors are usually retail or restaurant establishments, but they can also be a single store or establishment, collection of establishments, or an institution. Pedestrian loops should have an anchor located at the beginning and end of the route. Anchors generally include the following types of retail uses:

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



CMS should monitor existing anchors, encourage new anchors where necessary, and work with the Chamber to develop promotions centered around Downtown Cassville's anchors. The City should also consider the locations of anchors when planning public infrastructure projects so as not to disrupt business any more than necessary.

Promote Use of Upper Floor Space

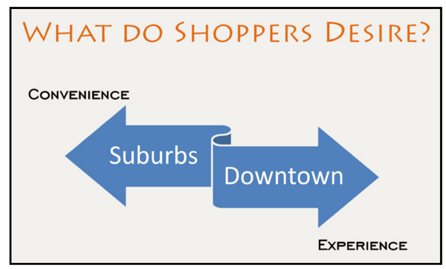
A strong residential presence is a key component to a prosperous downtown. Downtown residents enjoy close proximity to entertainment venues, restaurants, and shopping. These residents have the ability to expand the market by creating additional demand for products and services. Downtown residents also ensure that an area has activity, even when businesses close. Downtown Cassville has very few residents and the region is currently stagnating regarding residential growth. There are some buildings that could accommodate residential development through apartments, condos or lofts on the upper floors. However, it is critical that the City work to develop amenities that will lead to greater housing demand. Quality will be the key in attracting residents and maintaining 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 a downtown that is safe, clean, friendly, and offers plenty of variety. The consumer chooses the downtown shop for the experience, not for the efficiency of buying everyday items.

Downtown must convey a comfort level that welcomes shoppers, diners, and visitors in the context of a 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 Downtown shops and restaurants, and special orders.
- Making use of the internet and social networking to efficiently promote the store.
- Requiring employees to utilize off-street parking, reserving on-street spaces for customers. Collaborate with other store owners to extend this concept throughout Downtown Cassville.



Attracting Customers

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

Marketing

The promotion of attractions, businesses, and events is a major component of downtown retail development. These promotions are generally spearheaded by downtown organizations who recognize the necessity of reacquainting long-time residents, and introducing newer residents and visitors, to a downtown.

The Chamber and CMS should work to bolster Downtown events, festivals, parades, concerts, and other special events. These activities bring people Downtown and help raise the visibility of Cassville overall. The marketing strategy for Downtown Cassville should provide a mix of events, advertising, and promotions that reflect different aspects of the region, history, and cultural heritage.

RETAIL PRESENTATION & OPERATIONS

The appearance of a retail store is essential to its success. A store's appearance begins at the sidewalk and includes the storefront, entrance, and windows. Stores must appear interesting and inviting at the sidewalk. Simple additions of planters or window boxes that flank the entrance to the store add color and life to the street. Pedestrians may be stopped by a plant, bench, or sign attracting them to the store window. Keep the appearance of the sidewalk and storefront neat and clean. The store should also be clearly identified with signage and be as inviting as possible.

The store entrance should be recessed from the sidewalk to emphasize the entry, provide shelter, and remove the open door from the pedestrian path. The entrance should be ADA compliant. The door should provide a view into the building as well as a sense of openness. Rear entrances may also provide opportunities to welcome a customer and should be as inviting and appealing as the main entry. Shoppers learn everything about a store from the storefront windows. Display windows act as the store's billboard. A positive tone should be set by the windows. Great window displays will help lure customers into the store. Corner storefronts are significant opportunities to beckon pedestrians to cross the street and walk past an entirely new block of stores.
When display windows are vacant, they project an unsafe image that discourages pedestrians. CMS should work with property owners of vacant spaces to provide displays or advertising for Downtown events to prevent the vacant feel.

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 having later hours, such as restaurants, theaters, and drinking establishments, may be compelled to visit later. However, window lighting should not impose on upper-story residents or create glare on the sidewalks or streets.

SIGNAGE AND BRANDING

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

business cards, and advertisements. Shopping bags with logos are walking advertisements that reinforce the brand of the store.

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. Making the back wall visible and interesting all the way from the front of the store helps to draw customers. This can be as easy as using paint or unusual fixtures. Place sale or clearance merchandise in the back to encourage customers to walk past other items.

- Grouping Merchandise. Techniques for grouping the merchandise can help shoppers make their decisions faster and therefore buy more merchandise while they are in the store. Some methods include:

- ⇒ By Color. Group all red items together, blue items together, etc. This is often used for seasonal items.
- ⇒ Product Combination. These items provide opportunities for customers to purchase combined products with a similar theme. Group clothing with coordinating accessories or "Staff Favorites."

- ⇒ Fabrication Type. All glass should be kept with the glass, wood with wood, pewter with pewter and pottery with pottery.
- ⇒ Impulse Items. These are often located by the register and are generally offered as inexpensive add-ons to the primary purchase.

Give customers the opportunity to learn about merchandise, provide customers information about special products and offer samples. All retailers should keep counters clean and clutter free. Showcases and display cases should be well-lit. A downtown map and business directory should be located at each register. This will encourage shoppers to visit neighboring stores and help visitors navigate downtown. The store should be viewed from the customers viewpoint and these following concepts should be kept in mind.

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

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

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IMPLEMENTATION

This Retail Market Analysis Report has identified a wide range of goals and strategies, based upon an analysis of the demographic and economic trends driving Downtown Cassville's retail market. The implementation of these goals and strategies will be included in the DREAM Downtown Strategic Plan and will include integration with other tasks such as funding sources, residential analysis, 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 Residential Demand Analysis, Building and Streetscape Design Concepts, and Financial Assistance Review. The recommendations found in these reports are critical to lay the foundation for the retail recommendations in this analysis.
- As of the writing of this report, Downtown Cassville is lacking in residential and restaurant uses. There is a fair amount of vacant space 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 vacant lots or redevelopment of underutilized buildings to develop high-quality residential spaces.
- On the heels of residential development, should come an increase to the already high demand for restaurant uses. Downtown should court developers interested in construction that consists of multi-story, mixed-use buildings with restaurant uses on the first-floor.
- The City should also encourage non-retail uses to relocate to side streets or upper-floors; preserving prime, 1st-floor locations for retailers and restaurants.
- CMS should encourage Downtown restaurants to develop higher-quality menus. The current restaurant sales per square foot is very low. If the overall quality of Downtown restaurants can be improved, Downtown can generate more income for the City. Focus group participants have noted that restrictions on liquor sales may be hurting Downtown restaurants.
- The City should continue and expand Downtown public improvements that focus on the safety of the pedestrian.
- CMS should support City of Cassville activities, events, and promotions that raise the visibility of the City overall. These efforts are necessary to attract more economic activity and residents, which CMS can then encourage Downtown businesses to capture.

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APPENDIX

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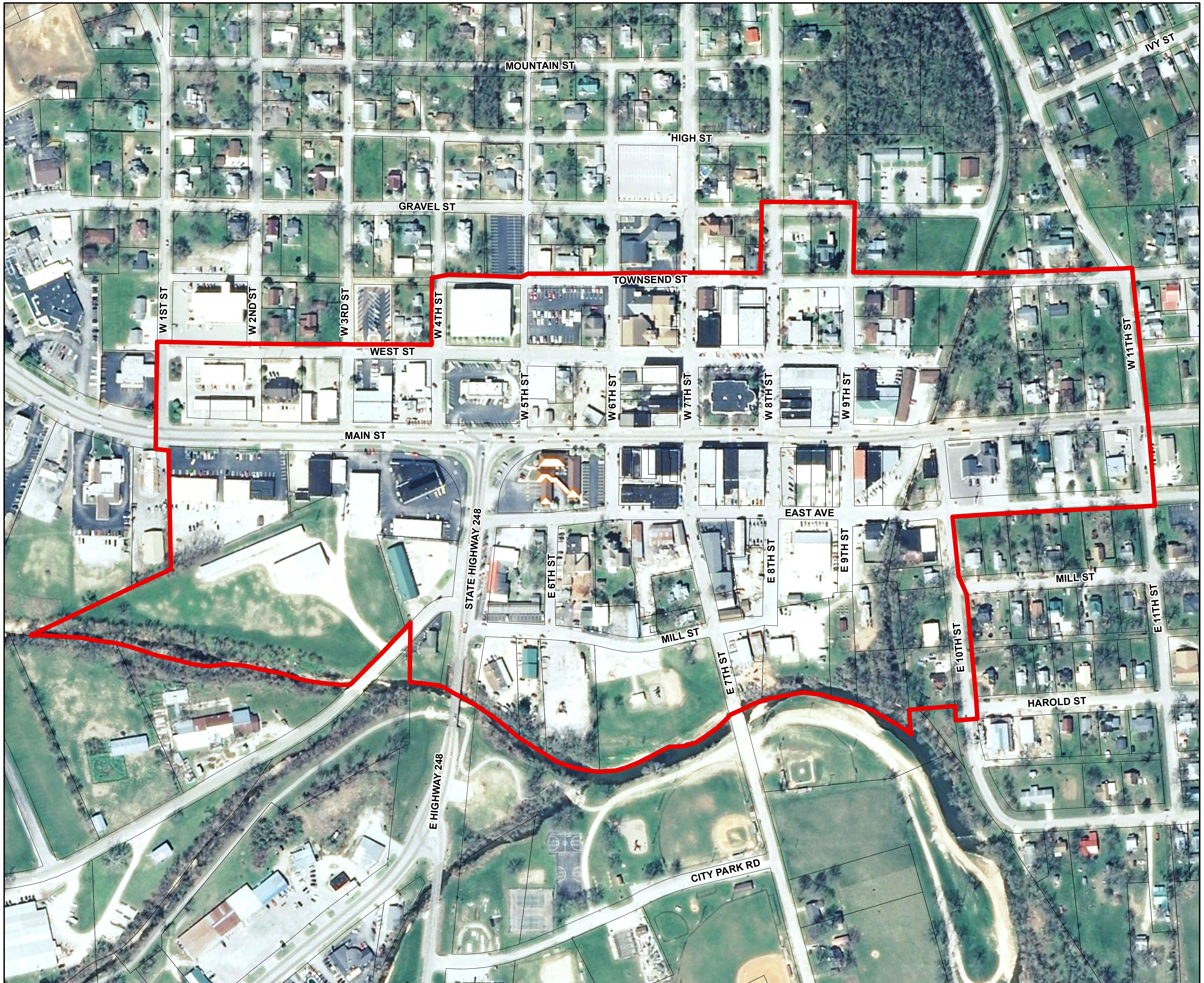
Appendix A-1
Downtown Cassville

Retail Market Analysis
City of Cassville, Missouri



Legend

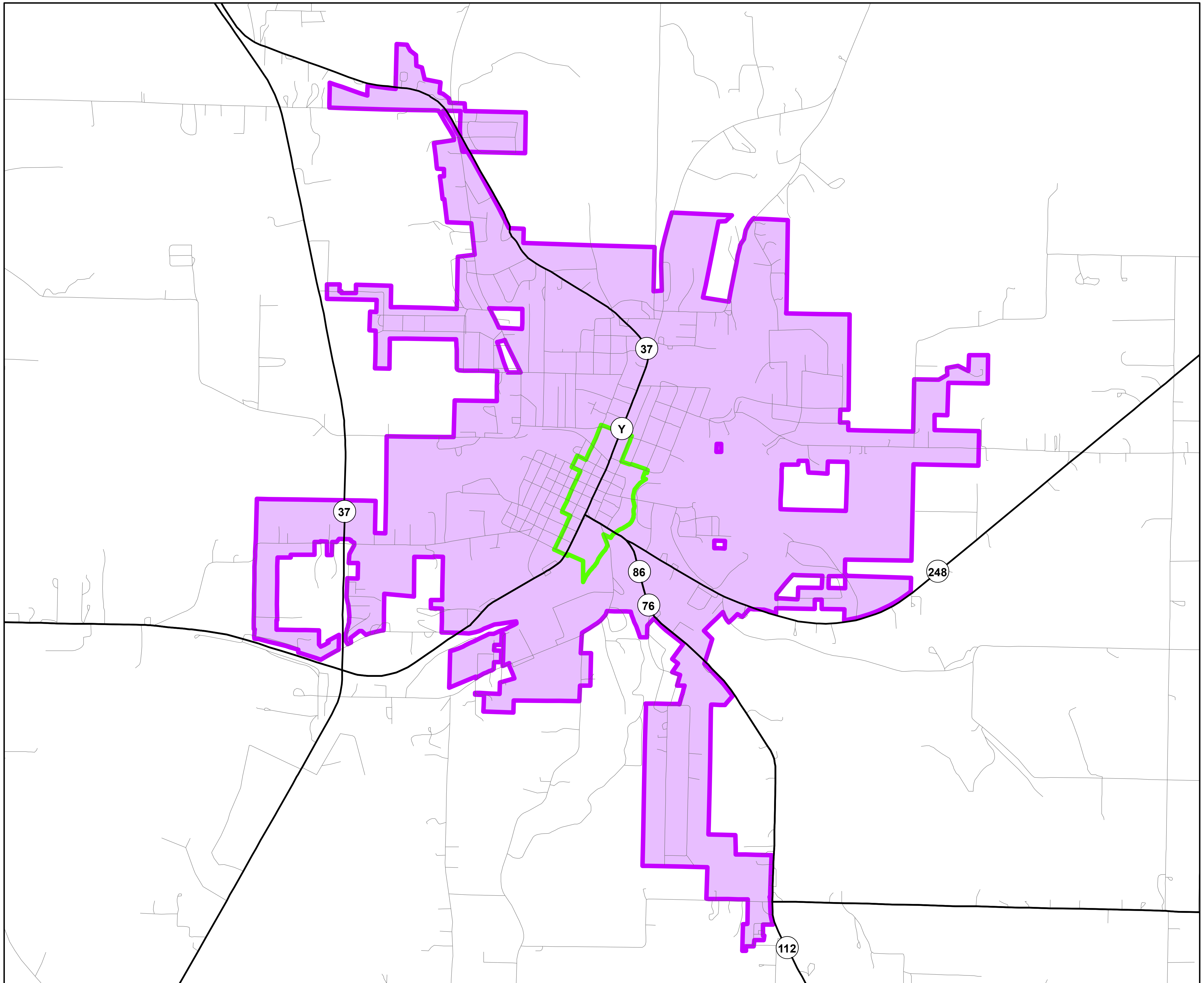
DREAM Boundary

0 140 280 560
Feet

May 2015

Appendix A-2
Primary Trade Area

Retail Market Analysis
City of Cassville, Missouri



Legend

DREAM Boundary

Primary Trade Area

0 1,000 2,000 4,000
Feet

N

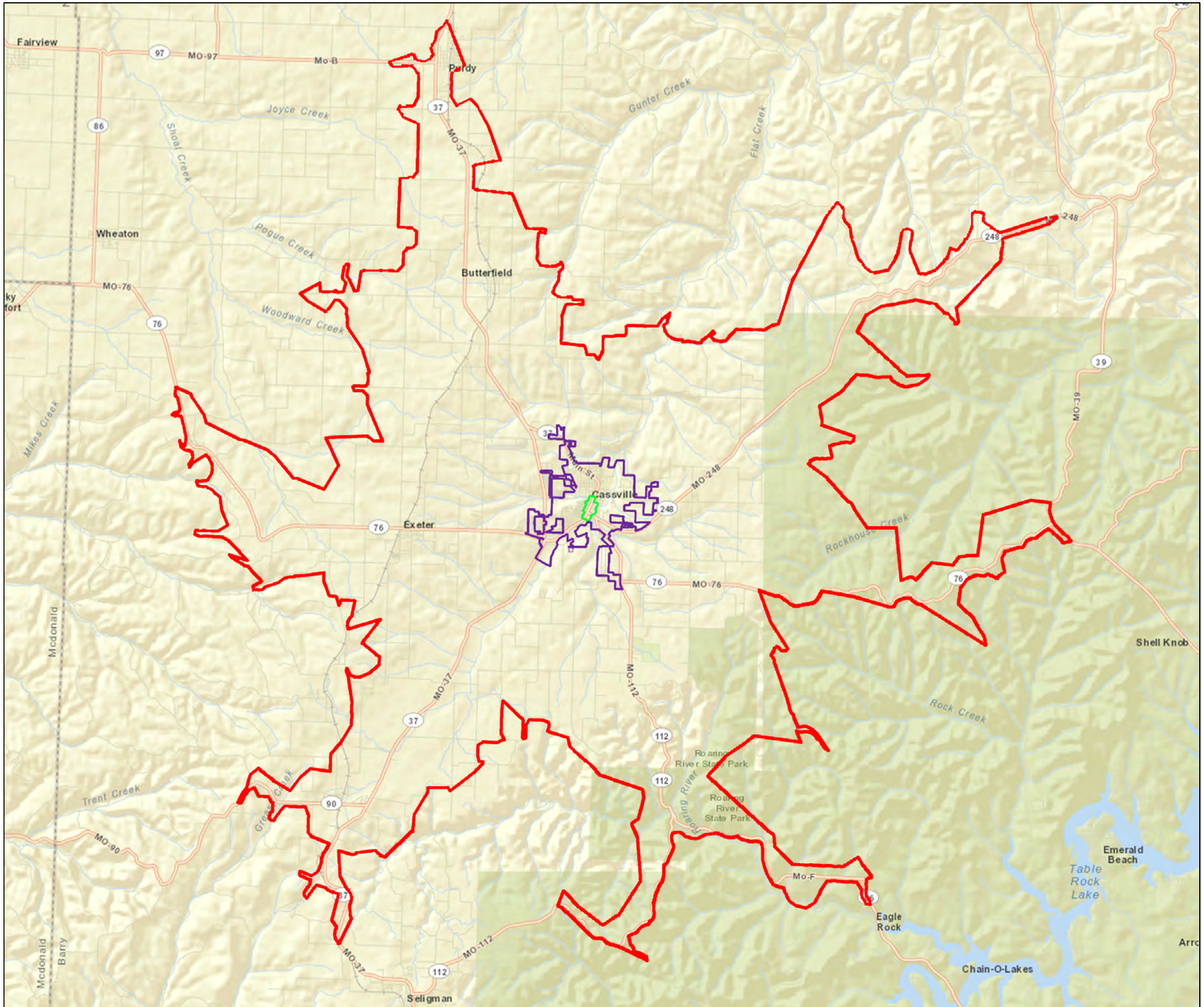
May 2015

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

PGAV PLANNERS

Appendix A-3
Secondary Trade Area

Retail Market Analysis
City of Cassville, Missouri



Legend

- DREAM Boundary
- Primary Trade Area
- Secondary Trade Area

0 0.35 0.7 1.4
Miles

May 2015

D·R·E·A·M INITIATIVE

PGAV PLANNERS

Appendix B

Downtown Cassville DREAM Study Area
Retail Demand & Sales

Industry Group	Secondary Trade Area Demand	STA Businesses	STA Total Retail Sales	STA Gap	Potential Square Footage	STA Per Capita Demand	City Retail Demand	City Businesses	City Total Retail Sales	Downtown Total Retail Sales [2]	Downtown Businesses [2]	Downtown Trade Area Capture	Downtown Pull-factor
Total Retail Trade and Food & Drink (NAICS 44-45, 722) [1]	**$47,895,157**	**82**	**$100,088,900**	**$ (52,193,743)**	**92,040**	**4,133**	**$12,343,994**	**56**	**$80,175,618**	**$14,685,306**	**13**	**3,553**	**34.83**
Total Retail Trade (NAICS 44-45)	**$39,501,246**	**68**	**$32,276,822**	**$ 7,224,424**	**47,519**	**3,409**	**$10,171,623**	**45**	**$74,983,329**	**$14,053,131**	**11**	**4,123**	**40.42**
Total Food & Drink (NAICS 722)	**$8,393,912**	**14**	**$6,548,231**	**$ 1,845,681**	**44,521**	**724**	**$2,172,371**	**11**	**$5,192,289**	**$632,175**	**2**	**873**	**8.56**
Furniture & Home Furnishings Stores (NAICS 442)	$1,604,879	7	$2,522,307	$ (917,428)	(6,034)	138	$419,796	5	$2,243,672	$541,167	1	3,907	38.31
Furniture Stores (NAICS 4421)	$917,246	3	$1,755,659	$ (838,413)	(5,515)	79	$235,215	2	$1,581,992	$344,105	1	4,347	42.62
Home Furnishings Stores (NAICS 4422)	$687,633	4	$766,648	$ (79,015)	(520)	59	$184,581	3	$661,680	$197,062	1	3,321	32.56
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$2,109,908	6	$1,957,842	$ 152,066	1,000	182	$550,680	6	$1,834,485	$573,786	1	3,151	30.90
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$2,954,629	6	$8,184,045	$ (5,229,416)	(34,397)	255	$772,795	3	$4,706,588	$317,849	1	1,247	12.22
Building Material and Supplies Dealers (NAICS 4441)	$2,324,082	5	$6,666,547	$ (4,342,465)	(28,563)	201	$605,964	3	$4,706,588	$317,849	1	1,585	15.54
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$630,547	1	$1,517,498	$ (886,951)	(5,834)	54	$166,831	0	$0	$0	0	0	0.00
Specialty Food Stores (NAICS 4452)	$229,670	1	$50,537	$ 179,133	1,178	20	$58,910	0	$0	$0	0	0	0.00
Beer, Wine, and Liquor Stores (NAICS 4453)	$405,137	4	$1,854,713	$ (1,449,576)	(9,535)	35	$104,368	2	$917,074	$0	0	0	0.00
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$7,059,089	6	$5,503,185	$ 1,555,904	10,234	609	$1,801,808	6	$5,070,687	$1,461,801	1	2,400	23.53
Clothing and Clothing Accessories Stores (NAICS 448)	$4,141,161	5	$1,084,386	$ 3,056,775	20,106	357	$1,087,314	3	$719,516	$222,647	1	623	6.11
Clothing Stores (NAICS 4481)	$2,902,008	4	$713,971	$ 2,188,037	14,392	250	$763,601	2	$370,267	$0	0	0	0.00
Shoe Stores (NAICS 4482)	$642,221	0	$0	$ 642,221	4,224	55	$167,102	0	$0	$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$596,932	1	$370,416	$ 226,516	1,490	52	$156,611	1	$349,249	$0	0	0	0.00
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$1,279,562	4	$481,643	$ 797,919	5,248	110	$335,255	1	$300,425	$0	0	0	0.00
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$1,193,070	4	$481,643	$ 711,427	4,679	103	$312,231	1	$300,425	$0	0	0	0.00
Book, Periodical, and Music Stores (NAICS 4512)	$86,492	0	$0	$ 86,492	569	7	$23,024	0	$0	$0	0	0	0.00
General Merchandise Stores (NAICS 452)	$17,008,553	3	$61,390,430	$ (44,381,877)	(291,927)	1,468	$4,357,013	3	$50,742,044	$518,023	1	353	3.46
Department Stores Excluding Leased Depts. (NAICS 4521)	$5,597,332	2	$1,554,064	$ 4,043,268	26,595	483	$1,440,105	2	$1,465,262	$518,023	1	1,072	10.51
Other General Merchandise Stores (NAICS 4529)	$11,411,221	1	$59,836,366	$ (48,425,145)	(318,522)	985	$2,916,908	1	$49,276,782	$0	0	0	0.00
Miscellaneous Store Retailers (NAICS 453)	$2,708,656	26	$10,511,579	$ (7,802,923)	(51,325)	234	$683,684	16	$8,448,838	$2,005,809	3	8,581	84.13
Florists (NAICS 4531)	$93,273	3	$218,156	$ (124,883)	(821)	8	$25,263	2	$100,060	$0	0	0	0.00
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$746,225	0	$0	$ 746,225	4,908	64	$190,549	0	$0	$0	0	0	0.00
Used Merchandise Stores (NAICS 4533)	$139,617	6	$707,170	$ (567,553)	(3,733)	12	$36,624	4	$391,067	$84,712	1	7,031	68.93
Other Miscellaneous Store Retailers (NAICS 4539)	$1,729,541	16	$9,585,782	$ (7,856,241)	(51,675)	149	$431,248	10	$7,957,711	$1,910,201	2	12,798	125.47
Food Services & Drinking Places (NAICS 722)	$8,393,912	14	$6,548,231	$ 1,845,681	44,521	724	$2,172,371	11	$5,192,289	$632,175	2	873	8.56
Full-Service Restaurants (NAICS 7221)	$3,149,507	6	$1,694,373	$ 1,455,134	35,100	272	$813,127	4	$646,902	$110,591	1	407	3.99
Limited-Service Eating Places (NAICS 7222)	$4,223,795	6	$4,543,073	$ (319,278)	(7,701)	364	$1,081,621	5	$4,252,362	$0	0	0	0.00
Special Food Services (NAICS 7223)	$369,928	0	$0	$ 369,928	8,923	32	$98,734	0	$0	$0	0	0	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	$650,682	2	$310,785	$ 339,897	8,199	56	$178,889	2	$293,025	$103,595	1	1,845	18.09

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

Appendix C
Retail Locations

Retail Market Analysis
City of Cassville, Missouri

ID	Commercial Location
1	Fasttrip
2-4	Packwood Furniture
5	Sunrise Family Restaurant
6	China Express
7-8	NU-2-U
9	The Computer Shop
10	Westco Home Furnishings
11-12	Whitley's Gifts & More
13	Whitley's Pharmacy
14	Tomblin's Jewelry & Gifts
15	Westco Home Furnishings
16	Westco Home Furnishings
17	BBQ Station
18-19	Bob's Discount Appliance
20	Pink Zebra Boutique
21	Papa Vapors
22	Dollar General
23	Granny's The Olde Home Place
24	Russel Cellular
25	Video Mart
26	Designs by Debbie
27	Diva's Bling
28	Forever Yours Embroidery & Gifts
29	Gussied up Boutique
30	Sater Pharmacy
31	Destiny's Clothing
32	Le Comptes Building Supply
33	Unique Cross Grains
34	ALTEK
35	Copy Cat
36	Cro-se Café
37	Jump Stop

0 125 250 500
Feet

May 2015

D·R·E·A·M INITIATIVE

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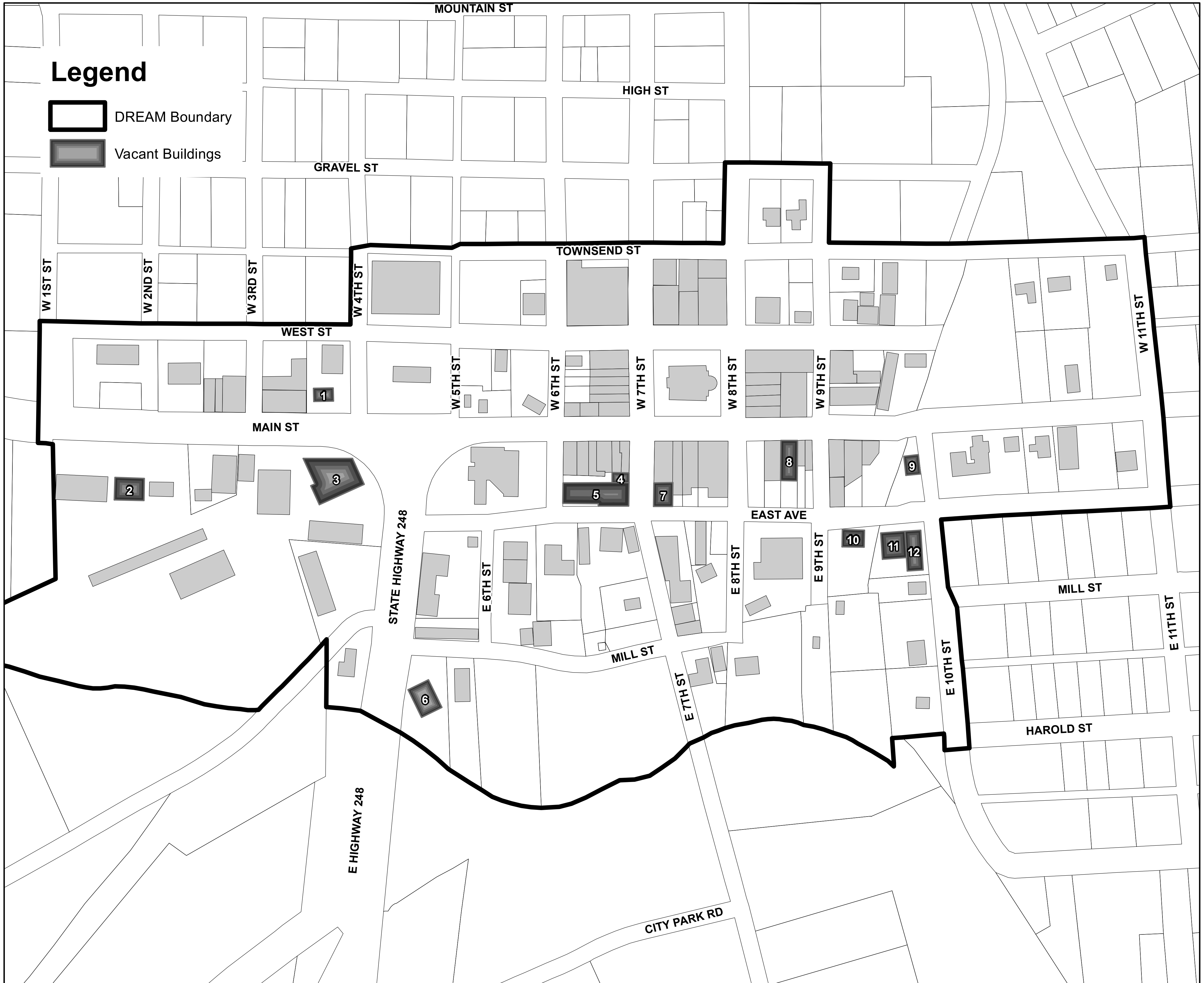
Appendix D
1st Floor Vacancies

Retail Market Analysis
City of Cassville, Missouri



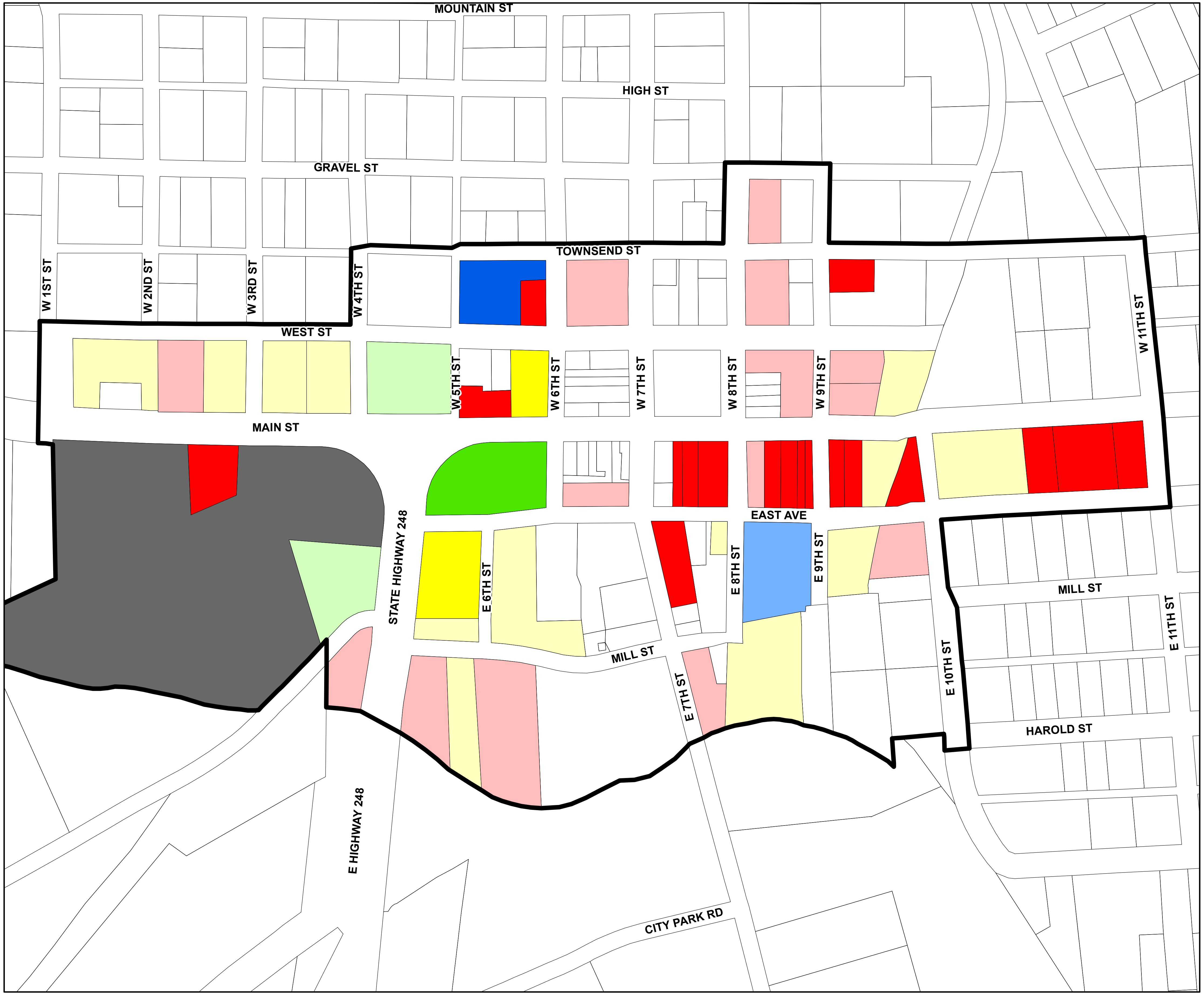
ID	Address	Available Sq.Ft.
1	308 Main Street	1,500
2	107 Main Street	1,900
3	313 Main Street	2,650
4	100 East 7th Street	1,000
5	102 East 7th Street	8,500
6	501 Mill Street	4,000
7	101 East 7th Steet	2,600
8	809 Main Street	3,900
9	911 Main Street	1,600
10	1 East 9th Street	2,200
11	907 East Avenue - Industrial	3,700
12	907 East Avenue - Industrial	3,700

0 125 250 500
Feet

May 2015

Appendix E
Off Street Parking

Retail Market Analysis
City of Cassville, Missouri



Legend

- DREAM Boundary
- 1-5 Spaces
- 6-10 Spaces
- 11-20 Spaces
- 21-30 Spaces
- 31-40 Spaces
- 41-50 Spaces
- 61-70 Spaces
- 71-80 Spaces
- 100 or More Spaces

0 125 250 500
Feet

May 2015

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

PGAV PLANNERS

Existing Store Checklist

Exterior

Storefront:

- Check Overall Condition, are repairs needed?

☐ Yes

☐ No

☐ Renovation/Remodel Preferred

Description

- 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

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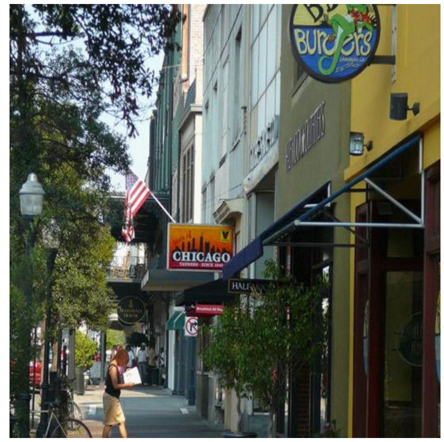

- Is signage maintained in good condition?

☐ Yes

☐ No

Description

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- Does the signage complement the building and area?

☐ Yes

☐ No

Description

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- Are the exterior signs lighted (at night)?

☐ Yes

☐ No

Description

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Existing Store Checklist

Display Windows:

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

Description

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- Are window displays rotated every 4-6 weeks?

☐ Yes

☐ No

- Do the displays effectively represent the store brand?

☐ Yes

☐ No

- Are displays including the best/most poplar products?

☐ Yes

☐ No

Description

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

☐ Yes

☐ No

Description

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- Are the window displays lit at night?

☐ Yes

☐ No

Existing Store Checklist

Interior

Flooring:

- Is the floor worn/hazardous/slippery?

☐ Yes

☐ No

- Is the floor clean?

☐ Yes

☐ No

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

☐ Yes

☐ No

- Is there a walk off area to clean shoes?

☐ Yes

☐ No

Description

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Ceiling:

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

☐ Yes

☐ No

Description

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- Is the HVAC duct work clean?

☐ Yes

☐ No

Existing Store Checklist

Ceiling:

- Are there any other distracting issues?

Description

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Lighting:

- Is the lighting adequate to show the merchandise?

☐ Yes

☐ No

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

☐ Yes

☐ No

- Are the bulbs the same type?

☐ Yes

☐ No

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

☐ Yes

☐ No

Description

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- Are there adjustable lights to create focal points?

☐ Yes

☐ No

Description

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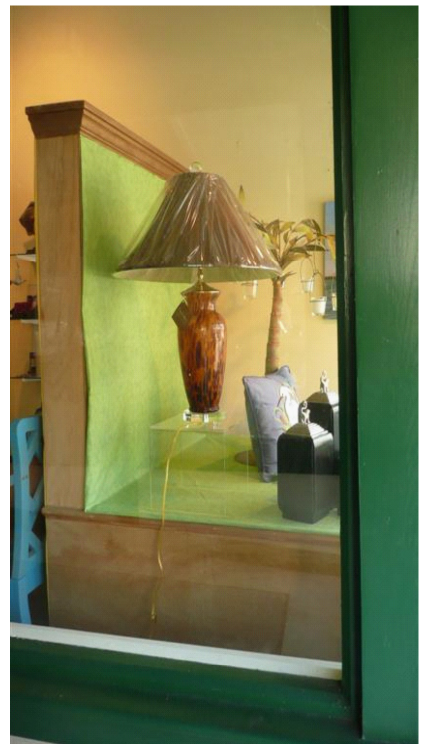
Existing Store Checklist



Interior Colors:

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

☐ Yes

☐ No

Description

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

☐ Yes

☐ No

Description

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- Are the paint colors consistent from fixture to fixture?

☐ Yes

☐ No

Description

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Circulation:

- Does the foot traffic flow smoothly?

☐ Yes

☐ No

Description

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Existing Store Checklist

Circulation:

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

  Description

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Cash Wrap/Register:

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

Existing Store Checklist

Cash Wrap/Register:

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

☐ Yes

☐ No

- Is there fixture nearby for impulse purchases?

☐ Yes

☐ No

Description

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Fixtures & Equipment:

- Does the fixture style match the brand or logo?

☐ Yes

☐ No

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

☐ Yes

☐ No

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

☐ Yes

☐ No

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

☐ Yes

☐ No

Description

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Merchandising:

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

☐ Yes

☐ No

Existing Store Checklist

Merchandising:

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

☐ Yes

☐ No

- Does the product inventory match the internet site?

☐ Yes

☐ No

Description

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

☐ Yes

☐ No

Description

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Cleanliness:

- Is the store clean?

☐ Yes

☐ No

Description

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- Are boxes cleared and out of sight?

☐ Yes

☐ No

- Are the views into off limits areas blocked?

☐ Yes

☐ No

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

Existing Store Checklist

Cleanliness:

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

  ☐ Yes

  ☐ No

  Description

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Comfort:

- Is the shop a comfortable temperature?

  ☐ Yes

  ☐ No

- Are the entry doors easy to open and close?

  ☐ Yes

  ☐ No

- Are the displays and fixtures stable?

  ☐ Yes

  ☐ No

- Is music incorporated to make the store feel occupied?

  ☐ Yes

  ☐ No

- Does the music reflect the store brand?

  ☐ Yes

  ☐ No

Dressing Rooms:

- Is there a bench, wall hook and mirror?

  ☐ Yes

  ☐ No

- Are the doors secure and is privacy addressed?

  ☐ Yes

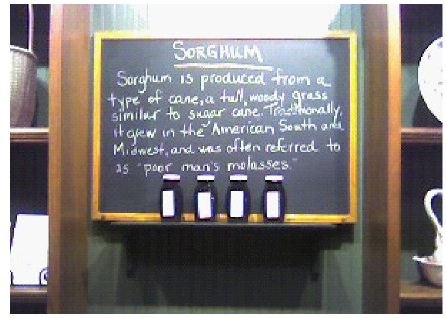
  ☐ No

- Are non-selected items returned to stock quickly?

  ☐ Yes

  ☐ No

Existing Store Checklist



Dressing Rooms:

- Are the rooms placed to discourage shoplifting?

  ☐ Yes

  ☐ No

Staff:

- Is the staff helpful and cheerful?

  ☐ Yes

  ☐ No

  Description

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- Is the staff educated about the merchandise?

  ☐ Yes

  ☐ No

  Description

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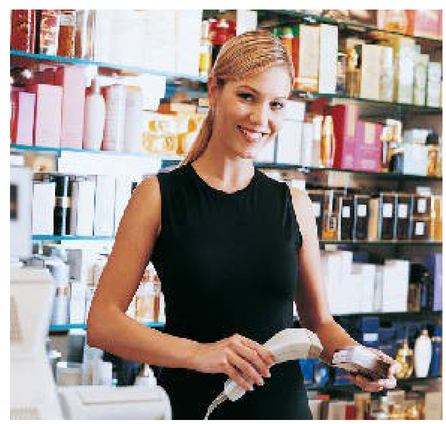

- Does the staff suggest other downtown shops to the customers?

  ☐ Yes

  ☐ No

  Description

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Other Comments.

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