

Ozark, Missouri

DOWNTOWN
REVITALIZATION &
ECONOMIC
ASSISTANCE FOR
MISSOURI

RETAIL MARKET ANALYSIS



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PGAV PLANNERS

ACKNOWLEDGMENTS



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EXECUTIVE SUMMARY

Ozark is a rapidly growing community and the county seat of Christian County, Missouri. The City is located a few miles south of Springfield, Missouri. Highway 65, which connects Springfield to Branson runs through the western portion of Ozark. The 2010 Census shows that Ozark has a population of almost 18,000 people. The City is home to several major employers including HealthMedX and Tracker Boats. Downtown Ozark is the center of government, being home to the Christian County Courthouse, City Hall, police and fire departments, public library, and various offices.

This Retail Market Analysis reveals that Downtown could see some increase in sales if Downtown businesses can absorb some unmet retail demand. However, the biggest opportunity for capturing retail sales is the development of additional retail buildings on the LCRA property and other vacant parcels. This conclusion is based on existing sales volumes, vacant floor space, and estimated leakage of retail dollars being spent outside of Downtown and the city limits. Downtown Ozark competes with other retail facilities within the City, primarily located along Highways 65 and 14; however the largest competition comes from south Springfield, which has a strong concentration of regional retail. Downtown Ozark can attract some types of retail by building on its picturesque setting, proximity to civic uses and neighborhoods, a high traffic count, good business density, and a solid stock of historic buildings.

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 limits; and the Secondary Trade Area (STA) which is a modified 15 minute drive-time from Downtown Ozark. The existing retail market, demographics, and DREAM community surveys were also documented and analyzed to help define a strategy that takes into account public preferences and strengthens the retail market in Downtown Ozark.

A review of market conditions provides an idea of the possible new and existing business potential for Downtown Ozark. The DREAM Land Use, Building, and Infrastructure Survey revealed the Downtown business potential for Downtown Ozark. Downtown contains about 466,000 usable square feet of existing first-floor commercial space that includes:

- 11,000 square feet of restaurant space (no vacant space)
- 40,000 square feet of retail space (7,700 square feet vacant)
- 168,000 square feet of office/service space (no vacant space)

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Retail Market Analysis Report for Ozark, Missouri*

- 63,000 square feet of mixed-use space (4,200 square feet vacant)

The retail/restaurant space is generating about \$3.85 million in annual sales (sales do not include auto dealers, gasoline stations, or non-store retailers). The retail space is generating about \$3.2 million or about \$99 per occupied square foot. The restaurant space is generating \$0.65 million or about \$63 per occupied square foot. Using these estimates, the 11,900 square feet of vacancy that can be used by a retail or restaurant use represents an additional \$0.75 to \$1.17 million in potential annual sales to the City.

The primary opportunity for retail development in Downtown Ozark is for the City to attract new retailers to vacant properties in the form of mixed-use development. However, other opportunities include encouraging existing businesses to expand and developing higher-quality products to increase the sales per square foot in Downtown. Additionally, the City should consider encouraging 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 many 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 Ozark in Springfield and on the internet. Such unmet retail demand presents an opportunity for Downtown Ozark to capture more retail dollars, thus improve the sales tax base for the City and creating a more vibrant Downtown environment in the process.

The following table lists the retail areas for potential growth in Downtown Ozark.

Industry Group	Opportunity ¹	Possible Retail Area (sq.ft.) Supported ²
Clothing Stores (NAICS 4481)	\$ 15,621,494	\$ 157,997
Full-Service Restaurants (NAICS 7221)	\$ 12,159,740	\$ 193,330
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$ 10,953,709	\$ 110,786
Limited-Service Eating Places (NAICS 7222)	\$ 8,927,789	\$ 141,945
Furniture & Home Furnishings Stores (NAICS 442)	\$ 6,169,903	\$ 62,403
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$ 5,169,197	\$ 52,282
Shoe Stores (NAICS 4482)	\$ 3,464,803	\$ 35,043
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$ 2,857,232	\$ 28,898
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$ 2,511,356	\$ 39,929
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$ 2,491,472	\$ 25,199
Beer, Wine, and Liquor Stores (NAICS 4453)	\$ 2,458,064	\$ 24,861
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$ 429,614	\$ 4,345
Special Food Services (NAICS 7223)	\$ 337,903	\$ 5,372
Other Miscellaneous Store Retailers (NAICS 4539)	\$ 307,155	\$ 3,107
Florists (NAICS 4531)	\$ 282,746	\$ 2,860
Book, Periodical, and Music Stores (NAICS 4512)	\$ 93,266	\$ 943
TOTAL:	\$74,235,443	889,299

The retail goods and services are classified according to the North American Industry Classification System (NAICS) in industry groups. The analysis considers the total unmet retail demand within the STA and the average retail sales per square foot (\$99) and the average restaurant sales per square foot (\$63). While the report shows that Downtown Ozark could support an estimated 889,000 square feet of retail/restaurant space, some of these types of stores may be less likely to locate in a Downtown environment due to today's retail market forces. Regardless, the number is staggering and represents a very real opportunity for Ozark to recapture at least part of these sales that are leaving the trade area.

The total demonstrated unmet demand for retail goods and services shows that over \$74 million in additional sales for Downtown Ozark could be generated if enough space was available.

Infill construction and relocation of office and service businesses to upper-floors and side streets should be pursued. The City should also pursue strategies to strengthen existing businesses and improve the quality, and likely the cost, of goods sold in Downtown to increase sales per square foot numbers.

Participants in the Ozark DREAM focus groups and respondents to the telephone and visitor surveys identified restaurant variety as a major need. This is definitely an opportunity. The Mill and the LCRA property are two great locations for a destination restaurant.

This Retail Market Analysis demonstrates that there are opportunities for Downtown Ozark to capture more retail sales in specific target areas. Opportunities exist to fill existing vacancies, as well as to create additional retail locations. The City should focus on strengthening existing businesses as well as attracting new stores. The City should also continue to work to attract developers interested in constructing multi-story, mixed-use Downtown buildings. These steps will result in an improved retail market that includes businesses to complement the broader Ozark retail market.

The Appendix of this report includes detail on the trade area's 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 Ozark businesses as they seek to improve their sales.

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INTRODUCTION

Downtown Ozark has a picturesque layout with an historic courthouse square, surrounded by mercantile, civic institutions, and office buildings. Downtown is located on bluff above the Finley River and historic mill. The street layout is a grid pattern with the brick pavers, decorative streetlights, and other streetscape elements. Third Street (Highway 14) is the primary north-south access to Downtown. However, the historic courthouse square is not easily visible from 3rd Street. An additional business area is located northwest of Downtown, across the Finley River. The DREAM Study Area includes this area, the historic courthouse square and some of the adjacent residential areas.

In order for Downtown to maintain its vibrancy and realize its potential as a retail area, it must provide opportunities for additional businesses and attract an expanded retail market. DREAM seeks to increase the retail draw of Downtown and therefore the importance of Downtown as a destination.

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. Such was the case in Ozark, with Highway 65 attracting the majority of retailers as the City grew.

Downtown Ozark is fortunate to have maintained a number of important civic and social service functions, making it a frequent destination for residents. However, these same institutions (and related uses such as title companies, bail bondsmen, and attorneys) use much of the buildings and parking spaces in Downtown. The existing retail in Downtown is primarily boutique and specialty retail, benefitting from the quaint and attractive Downtown setting.

Through the establishment of clear goals, strategies and steps for implementation, Downtown has an opportunity to build upon its positive aspects and take advantage of opportunities, such as the vacant areas just to the west of Downtown across 3rd Street. 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 Ozark. 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 Ozark DREAM Initiative activities, discussions were held, or surveys conducted residents, Downtown business owners, developers, property owners, key stakeholders, City officials and staff, and visitors. These various market segments each provide key insights into potential improvements to Downtown Ozark's retail services and opportunities for its expansion. Additionally, a thorough review of future residential demand for the trade area has been conducted in the Ozark DREAM Residential Demand Analysis. 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 Ozark. 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 2018. The analysis is meant to provide general strategic direction for developing retail in Downtown Ozark. 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 Ozark, the PTA is the Ozark city limits, and the STA includes any point within a modified 15-minute drive of Downtown. This drive-time boundary represents an acceptable catch-basin of consumers likely to make a shopping trip to Downtown Ozark, rather than to another community. A map of each area is included in Appendix A and the three areas are summarized below.

- ◆ Downtown Ozark (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 Ozark is defined as the DREAM Study Boundary.
- ◆ Primary Trade Area (PTA): This study classifies the boundary of the City of Ozark 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 modified 15-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 2010 for Downtown Ozark, the PTA, the STA, and the State of Missouri. The data was obtained from the 2010 United States Decennial Census. The Downtown Ozark DREAM Boundary does not coincide with a single census tract, therefore, the 2010 Census counts should not be relied upon as precise figures, but rather as estimates extrapolated from local census tracts and the City of Ozark. For purposes of comparison, the demographic tables in this report also use 2018 projections provided by a third-party supplier. These projections are derived from census data and general demographic trends for the State of Missouri.

Table 1, below, indicates the Ozark area has a slightly lower average household income than the State of Missouri. The median age in the Ozark trade areas is also significantly lower than State median age, with the PTA being the youngest and the STA the oldest.

TABLE 1: 2010 DEMOGRAPHIC SNAPSHOT

	Downtown Ozark	PTA	STA	State of Missouri
Population	231	17,820	53,119	5,988,927
Median Household Income	\$41,765	\$44,461	\$48,260	\$45,010
Housing Units	90	7,311	21,804	2,712,729
Owner Occupied	45	3,822	14,064	1,633,610
Renter Occupied	26	2,781	6,028	742,001
Vacant Units	19	708	1,712	337,118
Median Age	34.0	31.0	35.2	37.8
19 and Under	69	5,845	16,028	1,601,411
20-44	80	6,796	17,803	1,937,372
45 and Over	82	5,179	19,286	2,450,144

PRIMARY TRADE AREA (PTA)

The 2010 Census showed 17,820 people lived in the PTA (defined as the City limits of Ozark, as depicted in Figure 2) in 6,603 occupied housing units for an average of 2.7 persons per occupied unit. The median household income was \$44,461. The median age is 31 with about 33% of the population age 19 or younger, 38% between 20 and 44 years of age, and 29% age 45 years or more.

The population has grown rapidly over the past decade and is anticipated to continue to grow, although at a slower pace. Household income is expected to continue to grow. The table also shows growth in the number of housing units. The area’s population is aging, but is still relatively young. The populations of the oldest and youngest age cohorts are about equal.

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

Figure 2: Primary Trade Area

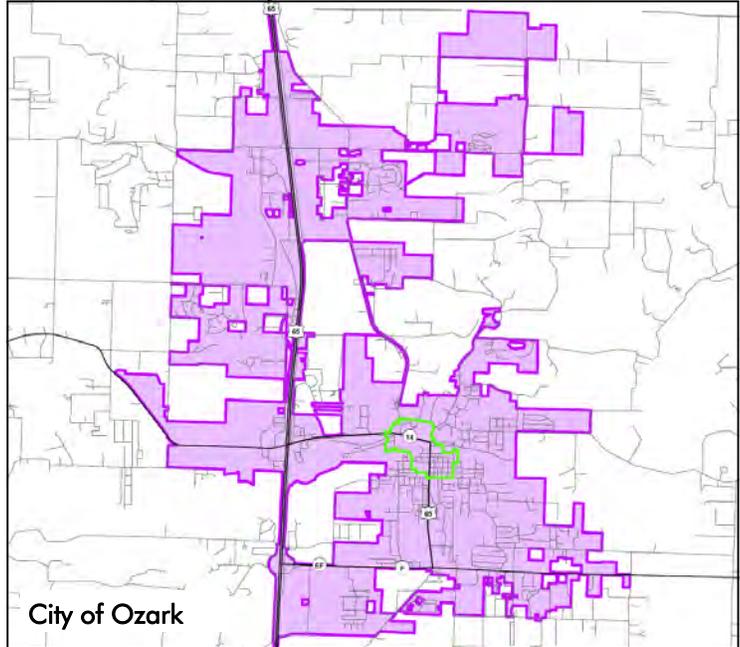


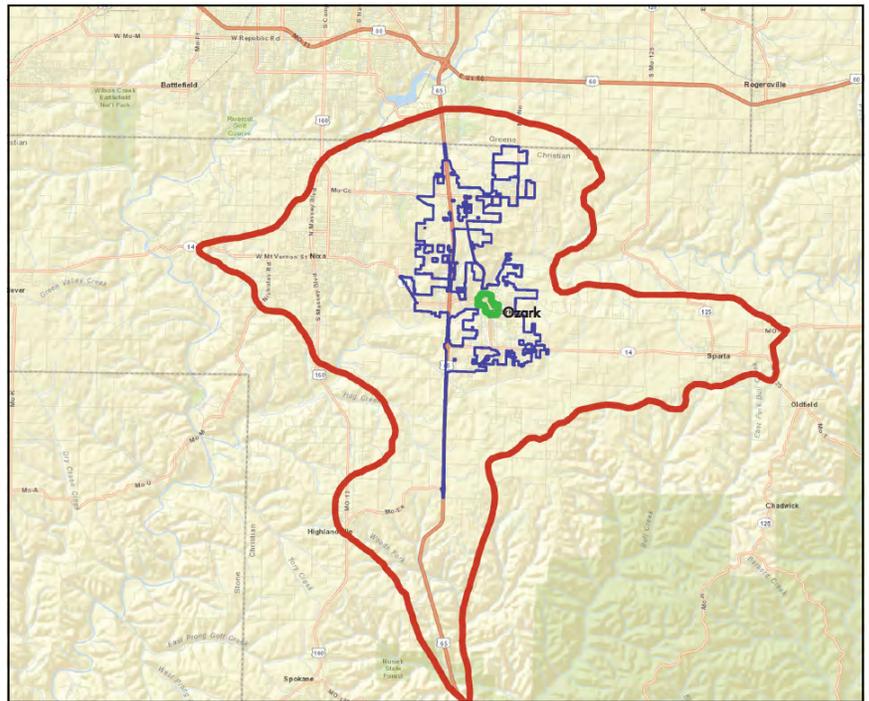
TABLE 3: PRIMARY TRADE AREA

	2000	2010	2018	% Change '00-'10	% Change '10-'18
Population	9,665	17,820	20,213	84.4%	13.4%
Median Household Income	\$34,210	\$44,461	\$52,322	30.0%	17.7%
Housing Units	3,853	7,311	8,303	89.7%	13.6%
Owner Occupied	2,271	3,822	4,668	68.3%	22.1%
Renter Occupied	1,364	2,781	2,820	103.9%	1.4%
Vacant Units	218	708	815	224.8%	15.1%
Median Age	29.8	31.0	33.7	4.0%	8.7%
19 and Under	3,043	5,845	6,233	92.1%	6.6%
20-44	4,121	6,796	7,294	64.9%	7.3%
45 and Over	2,501	5,179	6,685	107.1%	29.1%

SECONDARY TRADE AREA (STA)

Based on information from the 2010 Census, an estimated 53,119 people lived in the STA (refer to Figure 3) in 20,092 occupied housing units for an average of about 2.6 people per occupied housing unit. The median household income was \$48,260. The median age is 30 with approximately 28% of the population age 19 or younger, 34% between 20 and 44 years of age, and 36% age 45 years or more.

Figure 3: Secondary Trade Area



From 2000 to 2010 there was strong growth in the STA’s population, income, and housing units. This trend is projected to continue, although a more modest rate is likely. The median age has seen a moderate increase and is expected to continue this trend.

The following table illustrates, in further detail, current demographics and future demographic trends for the STA:

TABLE 4: SECONDARY TRADE AREA

	2000	2010	2018	% Change '00-'10	% Change '10-'18
Population	30,545	53,119	59,848	73.9%	12.7%
Median Household Income	\$38,978	\$48,260	\$55,819	23.8%	15.7%
Housing Units	12,098	21,804	24,716	80.2%	13.4%
Owner Occupied	8,338	14,064	15,797	68.7%	12.3%
Renter Occupied	3,114	6,028	6,845	93.6%	13.6%
Vacant Units	646	1,712	2,074	165.0%	21.1%
Median Age	33.5	35.2	35.9	5.1%	2.0%
19 and Under	9,253	16,028	17,584	73.2%	9.7%
20-44	11,713	17,803	19,916	52.0%	11.9%
45 and Over	9,579	19,286	22,347	101.3%	15.9%

STATE OF MISSOURI

As shown in the 2010 Census, nearly six million people lived 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 household income was \$45,010. The median age was nearly 38. About 27% of the population were 19 or younger, 32% were between the ages of 20 and 44, and 41% were age 45 years or more. Table 5, below, provides demographic information and future trends for the State of Missouri.

TABLE 5: STATE OF MISSOURI

	2000	2010	2018	% Change '00-'10	% Change '10-'18
Population	5,595,211	5,988,927	6,198,589	7.0%	3.5%
Median Household Income	\$38,005	\$45,010	\$53,001	18.4%	17.8%
Housing Units	2,442,017	2,712,729	2,712,729	11.1%	0.0%
Owner Occupied	1,543,354	1,633,610	1,678,923	5.8%	2.8%
Renter Occupied	652,018	742,001	790,779	13.8%	6.6%
Vacant Units	246,643	337,118	347,247	36.7%	3.0%
Median Age	36.1	37.8	38.9	4.7%	2.9%
19 and Under	1,594,172	1,601,411	1,571,208	0.5%	-1.9%
20-44	1,995,800	1,937,372	1,975,920	-2.9%	2.0%
45 and Over	2,005,239	2,450,144	2,651,461	22.2%	8.2%

DEMOGRAPHIC COMPARISON

Table 6 provides a demographic comparison of the 2010 estimates and shows the significant increase in population in Ozark experienced over the past decade. This increase is attributed to the rapid growth in single family homes. The STA experienced a population increase of about ten times that of the State. People are moving to Ozark from Springfield and from outside the region. Table 6 also shows that growth in household income for Downtown has outpaced that of the PTA, STA, or State. The median age of residents in Downtown Ozark declined, while the PTA did not age as much as the STA or State. The median age of Ozark and Downtown is significantly lower than the State overall.

TABLE 6: DEMOGRAPHIC COMPARISON

	Population % Change		Median HHI % Change		Median Age Change (in years)	
	00-'10	10-'18	00-'10	10-'18	00-'10	10-'18
Downtown	-16.3%	12.1%	29.5%	18.2%	-0.6	2.8
PTA	84.4%	13.4%	30.0%	17.7%	1.2	2.7
STA	73.9%	12.7%	23.8%	15.7%	1.7	0.7
State	7.0%	3.5%	18.4%	17.8%	1.7	1.1

Table 7 gives a comparison of age demographic trends. These trends show a Downtown population that decreased in all age groups. This population decrease was mainly due to the LCRA project that removed housing and is not expected to continue. The PTA and STA have shown strong growth, in all categories, but especially in the 45 and Over group. This growth is projected to regress to a more modest level, although still significantly higher than that of the State.

TABLE 7: TRADE AREA AGE COMPARISON

	19 & Under Change		20-44 Change		45 & Over Change	
	00-'10	10-'18	00-'10	10-'18	00-'10	10-'18
Downtown	-17.9%	1.4%	-20.8%	8.8%	-13.7%	24.4%
PTA	92.1%	6.6%	64.9%	7.3%	107.1%	29.1%
STA	73.2%	9.7%	52.0%	11.9%	101.3%	15.9%
State	0.5%	-1.9%	-2.9%	2.0%	22.2%	8.2%

Table 8, below, provides a comparison on housing units in the trade areas. The table shows that Downtown, as would be expected, has seen a significant decrease in housing units. The table also shows that more the PTA and STA have seen a remarkable growth in housing units. However, their has been a higher percentage growth in rental units than in owner occupied units.

TABLE 8: TRADE AREA HOUSING UNITS COMPARISON

	Housing Units Change	Owner Occupied Change	Renter Occupied Change
	00-'10	00-'10	00-'10
Downtown	-26.8%	-39.2%	-38.1%
PTA	89.7%	68.3%	103.9%
STA	80.2%	68.7%	93.6%
State	11.1%	5.8%	13.8%

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. There are a number of residents in and around Downtown Ozark, including some loft apartment dwellers. This existing residential activity and traffic is steady and provides the beginnings of a good consumer base upon which Downtown businesses can begin to draw.

PGAV PLANNERS conducted a Residential Demand Analysis from 2013 to early 2015 that projected residential demand for Ozark, with a focus on Downtown. The resulting DREAM Residential Demand Analysis, concluded that the Ozark market rate rental housing market was quite active and included hundreds of market rate units; many leased to young tenant households. The Residential Demand Analysis also concluded that there is a demand for 4,000 units for age 55+ households over the next five years. About 1,360 of these projected units are expected to be rental and 2,640 are expected to be owner-occupied. Additionally, the analysis showed demand for market rate and affordable family households, but family households with small children would likely suffer from some compatibility issues with a Downtown market. The analysis noted that Ozark is projected to continue to see population growth over the next few years. Along with other public and private improvements, this population trend provides an opportunity for the City to encourage mixed-use development with upper-floor housing options. However, the City should provide a focus on the quality of these units to ensure Downtown remains an attractive and more dynamic place.

Various housing types, such as single-family homes, apartments, and other multi-family options do exist in Ozark. Housing conditions vary, but are generally very good. The vacancy rate is extremely low overall, especially for middle to higher end units. There are some existing opportunities for upper-floor units in Downtown commercial buildings, but most owners have already converted this space for residential. There are a few vacant lots upon which new in-fill, mixed-use construction could occur and the LCRA property represents an enormous possibility for mixed use development that could include residential on upper floors and condominiums or town homes overlooking the Finley River.

A survey conducted of market rate apartments in Ozark found a rent range between \$400 to \$815 depending on the number of bedrooms, square feet, and quality. Rents for affordable units are generally between \$380 to \$490. Based on this survey, detailed market information for the STA provide by Reis Services, and interviews with area residential developers and property managers, PGAV PLANNERS estimated the following monthly rents for new construction of middle to upper end finish apartments in the PTA may be expected: Studio - \$500 to \$650; One Bedroom - \$550 to \$700; Two Bedroom - \$600 to \$700; Three Bedroom - \$700 to \$850; More than Three Bedroom - \$900 to \$1,100. At the time of the residential analysis, the median price for single family homes was about \$60,00 for a One Bedroom, \$100,000 for a Two Bedroom, \$130,000 for a Three Bedroom, \$210,000 for a Four Bedroom, and \$300,000 for Five Bedrooms or more. This range is greatly dependent on building condition, home size, and age of construction.

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 encouraging mixed use development on the LCRA site that includes second floor lofts and condominiums and townhomes, the City will create a stronger market for existing and future retail.

The City should also pursue a policy that seeks to preserve and improve its existing residential neighborhoods. The City can do this through continued code enforcement and investment in infrastructure such as the existing streetscape. Prioritizing residential neighborhoods nearby Downtown for infrastructure improvements will show the City's commitment to maintaining its historic central core. This will encourage continued reinvestment by property owners in existing properties as well as new construction. Maintaining good conditions in the Downtown residential market will provide 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 Ozark's businesses in the future. The City can work to address customers needs and implement a plan that increases Downtown's ability to provide needed services to these segments. The broad Downtown consumer categories reviewed for Ozark include:

Downtown Employees

- As shown in Table 9 on page 21, Downtown is home to about 500 employees and 100 businesses.
- This segment's impact on Downtown retail can be estimated as follows:
 $500 \times \$10 \text{ weekly} = \text{about } \$260,000 \text{ annually.}$
- Typically have a large demand for restaurants and food services at lunch and early evenings.
- Additional large demand for convenience items and shopping during work commute to and from Downtown.
- Frequent shopper reward programs and repeat business marketing efforts are effective for this user segment.

Downtown Residents

- About 231 residents live in 71 households in Downtown Ozark.
- The comprehensive buying demands of this segment can be greatly served with retailer product differentiation and improved store hours.
- Frequent shopper reward programs and repeat business marketing efforts are effective for this segment.
- This segment should provide a continuous source of loyal customers.

Ozark Residents

- This is a larger segment than Downtown Residents, with the PTA population of 17,820 shown in the 2010 census.
- This segment visits Downtown for many reasons, including conducting business with government offices, the post office, or businesses, dining, and shopping.
- 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 brand loyalty through targeted marketing and customer incentives and by providing expanded product selection for daily and weekly necessities.

Tourists - Visitors

- Visitors tend to look for unique experiences and products.
- This segment has a greater demand for entertainment options, as well as a need for convenience items that travelers may require.
- For Downtown Ozark, a large portion of this segment is related to visitors to local attractions, such as the Tea Room, Lambert's, antique stores, and Smallin Cave. A second opportunity is travelers on their way to Branson attractions.
- This segment is also very dependent upon lodging operators as an information source. Effective strategies for this segment will involve local lodging options.
- Strategies for serving this market segment may include effectively developing and marketing the Downtown brand as a unique experience worthy of a visit.

COMMUNITY SURVEYS

In order to gather information about perceptions and desires for Downtown Ozark, the DREAM Initiative conducted focus groups in the community, an online survey of residents, and a face-to-face meeting with community stakeholders. Those surveyed indicated what they liked or did not like about Downtown. Participants also gave suggestions on what should be prioritized to improve Downtown and make it more appealing. Both of the surveys and the focus group results offer an important source of

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

Focus groups were conducted to gather initial information about Downtown Ozark relative to four general groups: City Staff/LCRA; Downtown Steering Committee; residents; and business owners. Summarized comments regarding retail development included:

- The participants noted a lack of restaurants in Ozark, and specifically in Downtown. They especially desired live music/entertainment. Most noted that they go to nearby Springfield for restaurants.
- Participants also noted a desire to see outdoor seating and longer business hours in Downtown.
- Participants felt that some major issues facing Downtown included parking and navigation (wayfinding signs), concentration of service businesses and a lack of retail and restaurants, pedestrian safety / sidewalks, and rear elevations of buildings on 3rd Street.
- Participants desired a place for people to congregate and children to play, potentially with a water feature.
- The Farmer's Market and other events in Downtown and along the Finley River were noted as opportunities that draw substantial amounts of people to Downtown.
- The Mill was identified as an opportunity for redevelopment and to develop an attraction for Downtown.
- Some participants wanted to see a bakery, a butcher shop, a breakfast place, and a grocery store Downtown.

Upon completion of the Focus Groups, the DREAM Initiative conducted an online Community Survey of Ozark residents. Survey findings relevant to Downtown retail development include:

- Just over 46% of respondents answered that they visit Downtown "more than five times a month." Another 34% visit one to five times a month.
- Residents most often visit Downtown for "outdoor recreation, such as walking" (50%), "special events" (45%), "government" (43%), and "entertainment" (41%).
- A majority (78%) feel that retaining the historic character of Downtown Ozark is "very" or "somewhat" important.
- Survey respondents tended to be age 50-64 (37%) and most indicated they had lived in town for more than 20 years (51%). Respondents demonstrated a wide range of incomes, with 25% making \$100,000 to \$149,999.
- Family or casual dining was a top priority for 82% of respondents. Other

priorities followed with “fine dining” (73%), “ice cream shop” (68.5%), “art galleries & shops” (60%), “coffee / donut shop” (59%), “lodging such as a hotel, motel or bed & breakfast” (48%), All other responses were indicated by less than half of respondents as a top priority.

Information from the Community Survey will help in determining what adjustments to the Downtown Ozark 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. The priorities identified can help determine what retail mix will be successful and accepted in Downtown Ozark. 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 Ozark, and the surrounding area, have a fairly active and diverse economy that provides stability and a solid base for future economic development efforts. Table 9 illustrates the total estimated employment in 2010, for the trade areas.

TABLE 9: 2010 TOTAL EMPLOYMENT

	Downtown Ozark	PTA	STA
Employees	499	5,546	13,019
Businesses	109	1,012	3,008

The City of Ozark is a significant regional employment center, particularly in the areas of government, education, healthcare, and energy. Several of the largest Ozark employers are listed in Table 10, as provided by the Ozark Chamber of Commerce.

TABLE 10: OZARK AREA EMPLOYERS

Company Name	Industry	Employment
Ozark School District	Education	750
Wal-Mart	Retail	375
Lambert's Café	Restaurant	217
City of Ozark	Government	185
Christian County	Government	178
HealthMedX	Health Care	150
Tracker Marine	Manufacturing	101
Lowe's Home Improvement	Retail	72
Ozark Bank	Banking	52
OTC Richwood Valley Campus	Education	40

COMPARATIVE MARKET ANALYSIS

Businesses in Ozark have a sizeable employee base upon which to draw customers. The City is a regional hub for employment and business activity and Downtown is the core of that hub. In addition to numerous local businesses, there are several other attractions located Downtown that include:

- Christian County Courthouse
- Ozark City Hall
- Ozark Police and Fire Departments
- Public Library
- Tea Room

As noted, there are also several City-wide or regional attractions, including:

- Smallin Cave
- Lambert's Restaurant
- Antique stores
- Finley River Park and trails

Ozark has seen much growth and development in areas outside of Downtown; primarily along Highway 65 and Highway 14. Some of the development on the outskirts of the City has been incentivized. Improvements to Downtown to date have been funded through grant sources. However, the City of Ozark should work to ensure that Downtown benefits from incentivized development elsewhere in the City.

TENANT MIX & LAND USE

The Land Use, Building & Infrastructure Survey, conducted in 2011 and subsequently updated in 2014 for this report, gathered information on how Downtown parcels of land are being used. Table 11, on the following page, identifies a total of 197 parcels on which are located about 176 primary buildings that represent approximately 466,000 square feet of usable first-floor space. Twenty of these buildings were identified as retail and restaurant uses, representing about 51,000 square feet of space. Only about 7,700 square feet of the retail and restaurant space was vacant.

Table 11 also identifies 66 office and service buildings along with 13 mixed-use structures that represent about 230,000 square feet of space of with about 4,200 square feet of vacancy. Overall, 12,000 square feet of Downtown space is vacant and suitable for conversion to retail use. **The vacancy rates for all uses in Downtown are extremely low, essentially demonstrating that Downtown space is in high demand.**

Table 11 also indicates the overall composition of the existing occupied square footage in Downtown Ozark. Existing Downtown land-use is composed of about 15% residential, 1% industrial, 36% office/service, 23% public/institutional, 13% mixed-use, and 11% retail and restaurant. Retail and restaurant uses are critical to establishing a vibrant Downtown atmosphere. However, in Downtown Ozark, non-retail/restaurant uses account for 89% of the available space. This imbalanced situation may require the City of Ozark 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, current vacancies are very low, which may point more towards construction of new buildings that are attractive and blend well with the existing historic buildings.

TABLE 11: LAND USE TOTALS & SQUARE FOOTAGE

Land Use	Parcels	Buildings	Building Square Footage*	Vacant Square Footage	Percentage Vacant
Residential					
Single-Family	57	59	66,100	1,383	2.1%
Multi-Family	1	1	6,066	0	0.0%
Sub-Total	58	60	72,166	1,383	1.9%
Commercial					
Office / Service	53	66	167,547	0	0.0%
Retail	10	14	39,868	7,675	19.3%
Restaurant	4	6	10,577	0	0.0%
Sub-Total	67	86	217,992	7,675	3.5%
Mixed-Use	14	13	62,814	4,200	6.7%
Industrial	1	2	3,860	0	0.0%
Public / Institutional	17	15	109,520	0	0.0%
Vacant Lot	40	NA	NA	NA	NA
TOTAL	197	176	466,352	13,258	2.8%

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

* Building Square Footage is for 1st Floor.

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MARKET RESEARCH FINDINGS

RETAIL ANALYSIS

A review of market conditions provides an idea of the possible new and existing business potential for Downtown Ozark. As noted, Downtown contains about 466,000 usable square feet of existing first-floor commercial space that includes:

- 11,000 square feet of restaurant space (no vacant space)
- 40,000 square feet of retail space (7,700 square feet vacant)
- 168,000 square feet of office/service space (no vacant space)
- 63,000 square feet of mixed-use space (4,200 square feet vacant)

The retail/restaurant space is generating about \$3.85 million in annual sales (sales do not include auto dealers, gasoline stations, or non-store retailers). The retail space is generating about \$3.2 million or about \$99 per occupied square foot. The restaurant space is generating \$0.65 million or about \$63 per occupied square foot. Using these estimates, the 11,900 square feet of vacancy that can be used by a retail or restaurant use represents an additional \$0.75 to \$1.17 million in potential annual sales to the City.

Table 12, below, provides a breakdown of some of the retail establishments in Downtown Ozark, 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

TABLE 12: RETAIL ESTABLISHMENTS

	Downtown Ozark		Primary Trade Area		Secondary Trade Area	
	Businesses	Employees	Businesses	Employees	Businesses	Employees
TOTALS:	12	57	162	1,341	419	2,781
Furniture & Home Furnishings Stores	0	0	7	18	22	53
Electronics & Appliance Stores	2	3	6	14	18	45
Bldg. Materials & Garden Equipment & Supplies	0	0	7	187	22	242
Food & Beverage Stores	1	8	13	170	39	350
Health & Personal Care Stores	0	0	7	146	23	238
Clothing & Clothing Accessories Stores	0	0	4	15	19	75
Sporting Good, Hobby, Book & Music Stores	0	0	10	17	23	48
General Merchandise Stores	1	1	4	109	7	497
Miscellaneous Store Retailers	3	7	38	91	76	189
Arts, Entertainment & Recreation	1	4	18	146	58	342
Accommodation	2	17	4	16	10	35
Food Services & Drinking Places	2	17	44	412	102	667
Total Businesses (including non-retail)	109		1,012		3,008	
Total Employees (including non-retail)	499		5,546		13,019	
Total Residential Population	231		17,820		53,119	
Employee/Population	2.16		0.31		0.25	

main Downtown businesses. The retail services listed in tables 12 and 13 are organized according to the NAICS to allow for comparison of retail activity by sectors or categories. Recommendations can then be developed to address any gaps in retail service. Due to differences in allocating businesses to various categories, these tables may not match completely. The tables also are meant to provide indicative information of business types rather than a thorough listing of every Downtown business in these categories.

TABLE 13: EXISTING RETAIL

NAICS Industry Group	Store Name
Automotive	Finley River Motors
Furniture & Home Furnishings Stores	Brown Eyed Girl
Clothing Stores	Torn Boutique
Nondepository Credit Intermediation	Doc Holliday's General Store
Sporting Goods/Hobby/Musical Instrument Stores	Elephant & Castle Fine Arms Company
Florists	Wheeler Gardens & Florist Hazel's Flower and Gift Store
Office Supplies, Stationery, and Gift Stores	Signature Style Enchanted Parlor The Persimmon Tree
Used Merchandise Stores	Daisy Mae's Vintage Home Sweet Pea's Antique and Consignments Harrison House Vintage Goods The Chicken Coop Riverview Antique Center Neat Repeat's Thrift Store The Bleau Barn Custom Home Décor Spring Creek Antiques The Avant Garde'n Downtown Marketplace Weezie's Upscale Resale
Other Miscellaneous Nondurable Goods Merchant Wholesalers	Smokers Outlet LLC
Food Services & Drinking Places	Rosie Jo's Café Daylight Donuts Golden Dragon Oriental Foods Spring Creek Tea Room The Original 3rd Street Pasta & Grill 2nd Street Café Stacey's Sweets Markethouse Café Mama's Style Kitchen Ben's on the Square Iguana Roja

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, on the following page, provides annual household consumer expenditures for seven main categories and several sub-categories of retail expenditures.

TABLE 14: CONSUMER EXPENDITURES

	Downtown Ozark	Primary Trade Area	Secondary Trade Area
Median Household Income	\$41,765	\$44,461	\$48,260
Average Annual Household Expenditures for Selected Retail Sectors			
Food	\$6,135	\$6,564	\$7,125
Food at Home	\$3,805	\$3,983	\$4,330
Food Away from Home	\$2,330	\$2,581	\$2,796
Apparel and Services	\$1,091	\$1,208	\$1,305
Household Merchandise	\$1,239	\$1,379	\$1,497
Electronics	\$461	\$516	\$556
Household Goods	\$778	\$863	\$940
Household Care	\$1,909	\$2,096	\$2,322
Transportation and Travel	\$6,902	\$7,514	\$8,184
Transportation	\$5,971	\$6,420	\$6,991
Travel	\$931	\$1,093	\$1,193
Health & Personal Care	\$1,436	\$1,426	\$1,560
Health Care	\$543	\$539	\$599
Personal Care Products	\$893	\$887	\$962
Entertainment & Recreation	\$2,175	\$2,384	\$2,602
Total for Selected Sectors	\$20,885	\$22,571	\$24,595

The largest portion of expenditures are spent on transportation and travel, with food (at home and away from home) coming in second. It is important to note that most transportation expenditures (gasoline, etc.) are excluded from the retail sales calculations in this report. Table 14 also shows about 6% of total expenditures (and about 60% of all food expenditures) is spent on food away from the home. The STA has the largest income of the trade areas, and Downtown has the lowest. Downtown spends a lower amount than the PTA or STA in every category.

Table 15, on the following page, suggests Ozark’s potential purchasing power by providing the 2012 estimate of the number of households at regular income thresholds. Table 15 shows that nearly 27% of Downtown households have income of less than \$25,000 annually, while this amount drops to 24% for the PTA and 21% for the STA. This is indicative of the housing stock in Downtown. However, 20% of households make over \$75,000 annually. This amount increases to 23% for the PTA and 26% for the STA. Determining the retail sectors that have unmet demand, and that will appeal to residents of the PTA and STA, will help Downtown capture and retain locally spent retail dollars. Targeting the residents of these households with

marketing efforts is an important marketing activity to expand the Downtown retail base.

TABLE 15: HOUSEHOLD INCOME (2012 Estimated)

Income Level	Downtown Ozark	Primary Trade Area	Secondary Trade Area
Less than \$ 15,000	12	895	2,287
\$ 15,000 - \$24,999	8	755	2,169
\$ 25,000 - \$34,999	7	748	2,596
\$ 35,000 - \$49,999	18	1,494	3,790
\$ 50,000 - \$74,999	14	1,416	4,626
\$ 75,000 - \$99,999	8	855	2,542
\$ 100,000 - \$149,999	6	557	2,181
\$ 150,000 - \$199,999	1	117	462
\$ 200,000 +	0	92	381
Total	74	6,929	21,034

POTENTIAL STORE SPACE SUPPORTED

The City of Ozark has a healthy-sized trade area. However, nearly all categories of retail products are demonstrating unmet demand. This likely indicates that STA residents are shopping outside the STA or PTA for these products. This unmet demand presents an opportunity for Downtown Ozark to capture more retail dollars and expand its retail base.

Table 16, shows the retail categories that are demonstrating unmet retail demand (the difference between retail demand and actual sales) for Downtown Ozark. The Analysis considers the total unmet retail demand within the STA and the average retail sales per square foot (\$99) and the average restaurant sales per square foot (\$63). While the table shows that Downtown Ozark could support an estimated 889,000 square feet of retail/restaurant space, some of these types of stores may be less likely to locate in a Downtown environment due to today’s retail market forces. Regardless, the number is staggering and represents a very real opportunity for Ozark to recapture at least part of these sales that are leaving the trade area.

Existing retailers could capture some of the unmet demand in these specific retail categories by expanding their floor area and adding new products, or the City could encourage new development in vacant properties, in the LCRA area, and redevelopment of the Rosie Jo’s shopping center. The extremely low number of vacant spaces means that new building must be constructed to capture these dollars in the Downtown. Downtown Ozark could also encourage office and service uses to

relocate to upper-floors and side streets; reserving prime first-floor spaces for retail uses.

TABLE 16: FUTURE RETAIL GROWTH

Industry Group	Opportunity ¹	Possible Retail Area (sq.ft.) Supported ²
Clothing Stores (NAICS 4481)	\$ 15,621,494	\$ 157,997
Full-Service Restaurants (NAICS 7221)	\$ 12,159,740	\$ 193,330
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$ 10,953,709	\$ 110,786
Limited-Service Eating Places (NAICS 7222)	\$ 8,927,789	\$ 141,945
Furniture & Home Furnishings Stores (NAICS 442)	\$ 6,169,903	\$ 62,403
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$ 5,169,197	\$ 52,282
Shoe Stores (NAICS 4482)	\$ 3,464,803	\$ 35,043
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$ 2,857,232	\$ 28,898
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$ 2,511,356	\$ 39,929
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$ 2,491,472	\$ 25,199
Beer, Wine, and Liquor Stores (NAICS 4453)	\$ 2,458,064	\$ 24,861
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$ 429,614	\$ 4,345
Special Food Services (NAICS 7223)	\$ 337,903	\$ 5,372
Other Miscellaneous Store Retailers (NAICS 4539)	\$ 307,155	\$ 3,107
Florists (NAICS 4531)	\$ 282,746	\$ 2,860
Book, Periodical, and Music Stores (NAICS 4512)	\$ 93,266	\$ 943
TOTAL:	\$74,235,443	889,299

¹ Indicates unmet consumer demand within the Secondary Trade Area.

² Based on \$99 in retail sales per square foot, \$63 in restaurant sales per square foot, and existing retail building inventory and activity in Downtown Ozark.

Other conclusions that may be drawn from Table 16, include the following:

- In the focus groups and the telephone and visitor survey, respondents identified various forms of dining, primarily casual, as one of the most desired new businesses. The analysis shows a strong demand for restaurants of various types. The LCRA property, the mill property, and other locations could be opportunities for large restaurants that can serve as destinations. There may also be opportunities for existing Ozark restaurants to expand or relocate into a Downtown location, or to adjust their menus and services.
- As noted, the retail sectors of “Clothing Stores” “Jewelry, Luggage, and Leather Goods” and “Shoe Stores” are demonstrating great amounts of unmet demand. The retail gaps in these sectors are noteworthy because they may indicate an opportunity to open a specialty and boutique stores catering to the local community. Stores of this type would provide a draw and help

Ozark reclaim some lost sales taxes.

- The retail sector of “Electronics & Appliance Stores” is demonstrating significant unmet demand. It may be likely that this demand is partly being met on the internet. Some of these products could be combined with, or added to, “Furniture Store” and “Home Furnishings.” A large electronics or appliance store can be a very successful Downtown anchor. Stores of this type usually include a showroom that can decrease their sales per square foot. However, stores such as mobile phone stores, can occupy a small location and generate a sizeable amount of sales.
- Stores selling products in the categories of “Furniture”, “Office Supplies”, “Sporting Goods/Hobbies/Musical Instruments”, “Jewelry, Luggage, and Leather Goods”, “Home Furnishings”, “Other Miscellaneous Retailers”, “Shoes”, and “Specialty Food Services” are all demonstrating fair amounts of unmet retail demand and are candidates for attraction to, or expansion in, Downtown Ozark. These categories could be stand-alone stores or could be combined with similar products already discussed.
- “Beer, Wine, and Liquor” and “Books, Periodicals, and Music” are also demonstrating some unmet demand. However, these uses must be approached carefully, particularly in a Downtown. The City will need adequate zoning codes and procedures to ensure quality Downtown businesses in any retail category.
- 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, entertainment, and lodging options.

As Downtown Ozark seeks to add new retail stores, the impact on existing businesses should be considered. Adjustments to the business mix can have long-lasting ramifications. Additionally, the City should closely monitor the amount of public and institutional uses in Downtown. An imbalance of non-revenue generating land-uses can erode the Downtown tax base and lessen its relevance to the rest of the City. Finding and appropriate balance will create more of a shopping destination in Downtown Ozark.

AVAILABLE RETAIL SPACE INVENTORY

The vacant properties identified in Downtown Ozark are shown on Table 17 and on the 1st Floor Vacancy Map in Appendix D. A very few Downtown Ozark buildings have some vacancies, but there are few that are completely vacant. There are also a few vacant lots available for infill development. Much of the prime, first-floor retail space is occupied. The biggest opportunities are the LCRA property and future redevelopment of the Rosie Jo's shopping plaza. All of the current vacancies are under 2,500 square feet with the largest being 2,500 and the smallest 800. The average available existing vacant space in Downtown Ozark is about 1,700 square feet.

TABLE 17: 1ST FLOOR VACANCY

ID	Address	Available Sq.Ft.
1	907 West Jackson Street	1,400
2	900 West Jackson Street	2,350
3	301 East Jackson Street	1,400
4	103 South 3rd Street	2,000
5	500 North 3rd Street, Suite A	800
6	400 North 3rd Street	2,500
7	109 South Second Street	1,425

There are a couple of opportunities for boutique and specialty shops to occupy first floor vacant spaces; however, the unmet retail demand identified in this report will likely need additional buildings to be constructed and/or non-retail uses to move to upper floors, thus freeing up first floor space.

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DOWNTOWN OZARK RETAIL GOALS

- DEVELOP EXISTING BUSINESS SUPPORT PROGRAMS

The City, and the Chamber can help existing businesses succeed and grow, mainly through programs focused on improving business operations. These programs can build on those offered by the Chamber and 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.

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 Ozark, and a support structure with which to discuss their issues and needs. The Chamber and a future downtown organization should be involved in all strategies. Business promotions, marketing, events, and workshops should all fit within the two organizations' missions.

- CONTINUE TO IMPROVE THE QUALITY OF EXISTING RETAIL BUSINESSES

Improved retail stores and products will benefit Downtown and all markets. The Chamber should encourage merchants to focus on store aesthetics and products of interest to a variety of customers in an effort to develop strong product sales. Longer business hours, more services, and continuous improvement in customer service can increase the level of retail sales in Downtown. These are especially important for attracting customers from outside of the trade area.

- ENCOURAGE THE DEVELOPMENT OF SPACES BETTER SUITED TO RETAIL USES

Some of the available properties in Downtown Ozark are not appealing to retail uses or are located away from the main traffic areas. Additionally, there are several buildings occupied by governmental or institutional uses. This practice takes revenue generating retail properties off the market and can erode the City's tax base. The City should continue to seek infill development and rehabilitation of existing buildings. 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. Through zoning regulations, prime, ground-floor spaces around the Courthouse Square should be reserved for restaurant and retail uses as much as possible.

- **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. Along with Ozark residents, a likely source of entrepreneurs may come from those moving to the community from elsewhere. The City, and Chamber should consider entrepreneurial training programs such as Operation Jumpstart (www.operationjumpstart.biz). Informational events and meetings with local bankers and potential investors can help generate 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 Ozark's close proximity to the wide variety of products offered in Springfield, Missouri, it is critical that Downtown demonstrate a good variety of shopping, dining, and entertainment options. Downtown can broaden its retail variety by encouraging existing retailers to address categories of unmet demand as identified in Table 16 on page 26. These areas represent opportunities for local businesses to expand sales floors or add product lines. Additionally, merchants in areas that show little unmet demand, or an overabundance of supply, should consider adjusting their product lines or services.

The City and Chamber should work to make sure that existing businesses understand the Downtown market segment opportunities.

- **COLLECTIVELY MARKET DOWNTOWN RETAILERS**

A cooperative advertising campaign should be pursued on behalf of Downtown retailers. Merchants should promote their products, hours of operation, and special promotions to the various marketplace consumer segments. A "local bucks" gift certificate program could be created to support shop local efforts. Cooperative advertising for all Downtown stores, is a cost-effective strategy to convey the vibrant atmosphere of Downtown to existing visitors of regional attractions. Local newspapers and magazines, websites, radio, television ads and flyers should be used.

- CREATE DOWNTOWN EVENTS HAVING BROAD APPEAL

The City and a future downtown organization should continue to develop events to raise the visibility of Downtown as a shopping and entertainment destination. Sidewalk sales and window display contests should coincide with these events. Music and food are always attractive elements to add to any event. An event with alcohol should always include food and end earlier in the evening.

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DOWNTOWN OZARK STRATEGIES

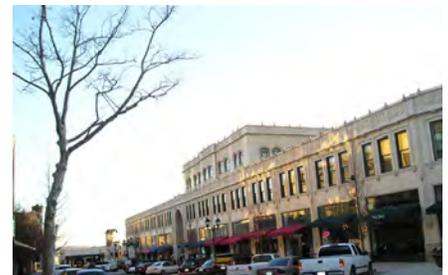
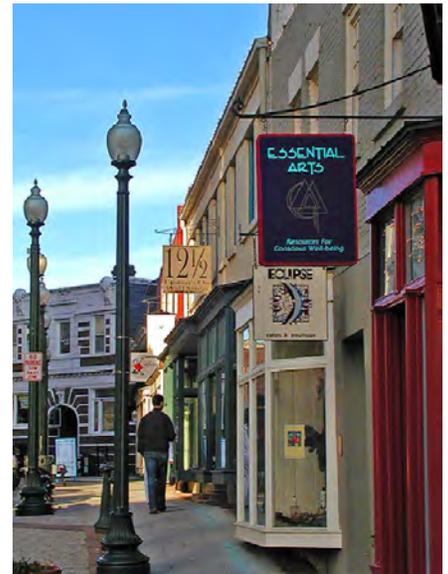
Achieving Downtown’s retail goals can be obtained by implementing several key strategies. These strategies must be realistic and based on an understanding of Downtown Ozark’s current retail market, its primary customers, and the spending potential of key customer segments identified earlier in this analysis.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

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 Ozark 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. Ozark has additional demands from the courthouse and county offices. 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 Ozark'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 Ozark. New public sector mechanisms such as a Community Improvement District (CID) may be needed to leverage funding programs or obtain other funds for streetscape, open space, and infrastructure improvements. Public sector activity should be aimed at inducing private investment in buildings and sites as part of a comprehensive physical revitalization program. The following items should be Ozark's priorities:

- The City should develop an incentive program that can be used by private property owners to improve the public facades 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.
- Encourage appropriate infill construction that adds retail space to Downtown, including development of the LCRA site. Opportunities, may arise in coming years as vacant spaces are filled. Retail uses should be the priority for ground-floor uses in all new buildings and infill construction in Downtown should generally complement 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 City should focus on improving the quality of the goods and services that are currently provided within Downtown Ozark. Although a large amount of unmet demand is filled by big box retailers, there are opportunities for local smaller retailers to take market share. Retail uses should be given priority for existing vacant spaces and new construction. The City may wish to target the retail establishments identified in Table 16 on page 29. However, any additional retail in Downtown Ozark will likely meet a target segments unmet demand.

The City and Chamber should collaborate on proactive business retention, expansion and recruitment efforts. This City-wide campaign should include existing business within Downtown and should encourage stores located elsewhere in the City that are looking to relocate or expand, to consider existing Downtown space.

The Chamber should seek to attract new retail uses and monitor commercial vacancies within Downtown Ozark. There are few existing vacant spaces. However, there are some vacant lots and some buildings that are not necessarily good retail locations. The City should work to preserve the prime Downtown spaces for retail and try to add new space through infill development.

Vacant lot and space listings should include suggestions of the type of business for which the available space is best suited. Listings should also be available online and appropriate buildings submitted to websites such as www.locationone.com. This listing should be limited to retail, restaurants, or unique services for Downtown Ozark.

The Chamber should also maintain a list of local bankers, and real estate agents to ensure potential investors have up-to-date contact information when they inquire about



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 businesses in Downtown. Involvement of property owners as part of the support system for encouraging private investment is critical.

A Business Retention, Expansion, and Recruitment campaign should also foster the existing entrepreneurial spirit within Ozark. Small businesses are the core of many local economies and generate significant job growth and revenue. Downtown locations are, by nature, more attractive and economical to a small-business startup than they are to a chain store or big box store. The City should collaborate with the Chamber to identify local entrepreneurs. Through programs such as www.operationjumpstart.biz, the City can assist business start-ups. The Chamber can promote Downtown locations and the City and Chamber can help connect aspiring business owners with financial and technical resources. The Chamber can also provide seminars to help entrepreneurs write effective business plans that financial partners will want to read, as well as to explore strategies to 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 retail success. A well developed mix of uses throughout Downtown will generate foot traffic and a solid 24-hour population. Too often the main retail strip in a downtown demonstrates an overabundance of service oriented uses. These service oriented businesses are important to the local economy, but may take up valuable sales tax revenue-generating retail space. The City should focus efforts on creating and maintaining a continuous retail loop in Downtown Ozark and expand this to the LCRA property and beyond. The ground floor spaces on these streets should be largely dedicated to retail or restaurant establishments. Pedestrian friendly loops of this type should be about one-quarter mile in length or a five to ten minute walk.



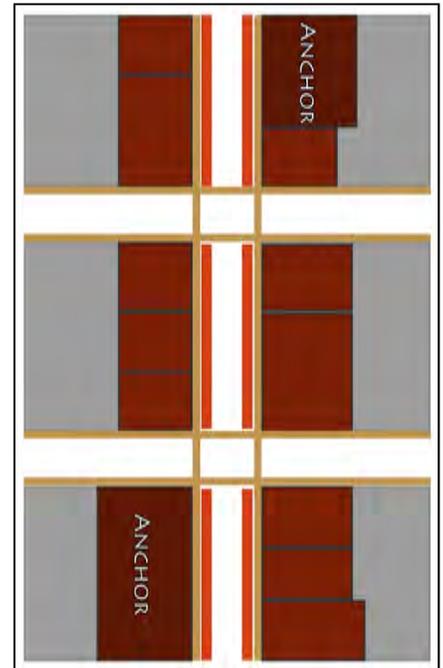
Anchors are large, well-known attractions that draw many customers. Anchors are usually retail or restaurant establishments, but they can also be a single store or establishment, collection of establishments, or an institution. Pedestrian loops should have an anchor located at the beginning and end of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

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

The Chamber and the City should monitor existing anchors and encourage the establishment of new anchors where necessary. The Chamber should also develop promotions around Downtown Ozark's anchors. The City should also consider the locations of these important retail stores when planning public construction projects.

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 Ozark has a competitive rental market that does not have enough supply currently. However, there are some buildings that could accommodate residential development through apartments, condos or lofts on the upper floors. It is critical that the City work to ensure such units are high-quality. There are also some other opportunities to develop multi-story, mixed-use infill buildings that can include upper-floor residential units. Quality will be the key in attracting residents and maintaining property values. The City should also work to keep housing standards high.



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 Ozark must convey an image and comfort level that welcomes shoppers, diners, and visitors and is built around a unique shopping experience. Downtown merchants can develop this unique experience through retail methods and improvements that include:

- Extending store business hours.
- Carry more unique or higher-end items that can't be found elsewhere.
- Offer expert, personalized, assistance and extraordinary customer service.
- Provide shopper service amenities like gift wrapping, free shipping, convenient return and exchange policies, recommendations to other Downtown shops and restaurants, and special orders.
- Use the internet and social networking to efficiently promote the store and eliminate overhead costs.
- Require employees to utilize off-street parking, reserving on-street spaces for customers. Collaborate with other store owners to extend this concept throughout Downtown Ozark.

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 or residents, 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. However, a truly outstanding merchant will understand the need to appeal across a broad customer base.

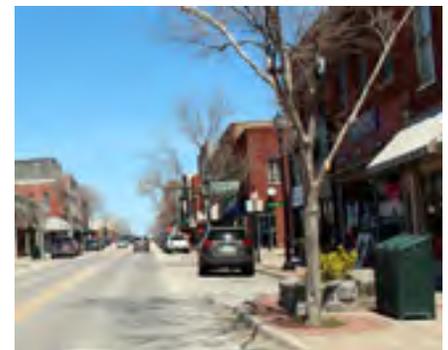
The City and Chamber can help provide a focus on marketing to help Downtown develop vibrant activity centers. Downtown business guides and restaurant profiles should be made available on-line, at welcome centers, hotels, and at shops and restaurants. During large City events, Downtown retailers should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

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 Downtown retailers should continue to build upon Downtown events, festivals, parades, concerts and other special events. These activities bring people Downtown and expose them to Downtown businesses. The marketing strategy for Downtown Ozark should provide a mix of events, advertising, and promotions that reflect different aspects of the region, history, and cultural heritage.

Cooperative advertising (e.g. newspaper ads promoting multiple businesses) can be very beneficial for Downtown businesses. Whether print or electronic media, shared ads promoting numerous businesses help build an image of Downtown as a place with multiple shopping opportunities and can make advertising more affordable for smaller businesses. Cross-promotion efforts between Downtown Ozark businesses are occurring and the Chamber should continue to encourage this practice. The long-term success of Downtown efforts will depend on the quality of marketing and promotional activities provided. A mix of businesses that



provide a variety of experiences allows Downtown to become marketable to all market segments, incomes, and lifestyles.

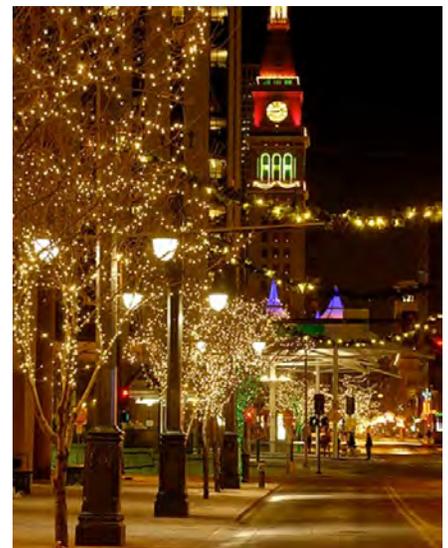
RETAIL PRESENTATION & OPERATIONS

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

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

WINDOW "HOW-TO'S"

Window displays must grab the attention of the pedestrian so they will be drawn into the store. Displays should incorporate graphic elements that highlight the stores merchandise. Window displays must also be rotated



occasionally to keep the pedestrian interested. Some techniques for window displays include:

- **Develop Themes.** Displays can follow a theme and integrate props. Themes can include store products or a specific set of related items such as sports equipment, romance items, nature, or patriotism.
- **Repetitive Objects.** Repeating objects creates a strong message. Objects do not need to be expensive to be a successful display. Simple objects such as cut out hearts, gloves. Lampshades, or balloons can create dynamic displays. Used and repurposed objects such as window frames, doors, or barrels can also be used to reinforce the display.
- **Flexible Backdrops.** Backdrops can be textured or fabric panels reflecting the products displayed, highlighting the season, or the richness of the interior that is found beyond the windows.
- **Allow for Lighting.** Lighted window displays add life to the evening streetscape. People leaving nearby businesses with later uses, such as restaurants, theaters, and drinking establishments may be compelled to visit later. However, window lighting should not impose on upper-story residents.



SIGNAGE AND BRANDING

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

INTERIORS

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

- **Feature Displays.** Once a customer has entered the shop, there should be an open area to allow them to adjust to their surroundings and make decisions. Feature displays should be visible from this entry area.
- **First Fixture.** The first fixture should be a display with a specific theme or product, well inside the entrance.
- **Music.** Music should be played that matches the store brand. This simple step will bring an empty store to life and helps to 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 customer service all work harmoniously to create a positive experience. This experience will remain with the visitor long after they leave the store and entice them to return as loyal customers.



IMPLEMENTATION

This Retail Market Analysis Report has identified a wide range of goals and strategies, based upon an analysis of the demographic and economic trends driving Downtown Ozark'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 aspects of Downtown such as organizational review, funding sources, design concepts, and marketing. Key steps for achieving the goals in this Retail Market Analysis include:

- Implement other key DREAM recommendations, such as those found in the Organizational Structure Review, 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 Ozark has little vacant space and a significant amount of unmet demand. The vacant space the City does have can likely be filled with improved 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 more high-quality retail spaces.
- The City and LCRA should court developers interested in construction that consists of multi-story, mixed-use buildings with retail uses on the first-floor. The vacant LCRA property west of Downtown should include retail uses as part of its overall development. The City should also encourage non-retail uses to relocate to side streets or upper-floors; preserving prime, first-floor locations for retailers and restaurants.
- The Chamber and City should encourage Downtown businesses to offer higher-quality goods in the categories that are demonstrating unmet retail demand. The City is losing a massive amount of retail sales to Springfield. To the extent local retailers prosper, Downtown can generate more income for the City.
- The City and Chamber should encourage the establishment of a formal downtown organization supported by a funding mechanism such as a Community Improvement District to help support existing Ozark businesses and the creation of new businesses in Downtown.
- Continue with public improvements with a focus on the safety of the pedestrian. It is important that pedestrians can easily and safely cross Downtown streets as well as 3rd Street to access future businesses in the LCRA property.
- Cooperatively and effectively market Downtown businesses and continued promotion of the Farmer's Market and other events Downtown.

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APPENDIX

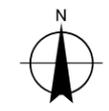
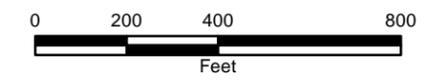
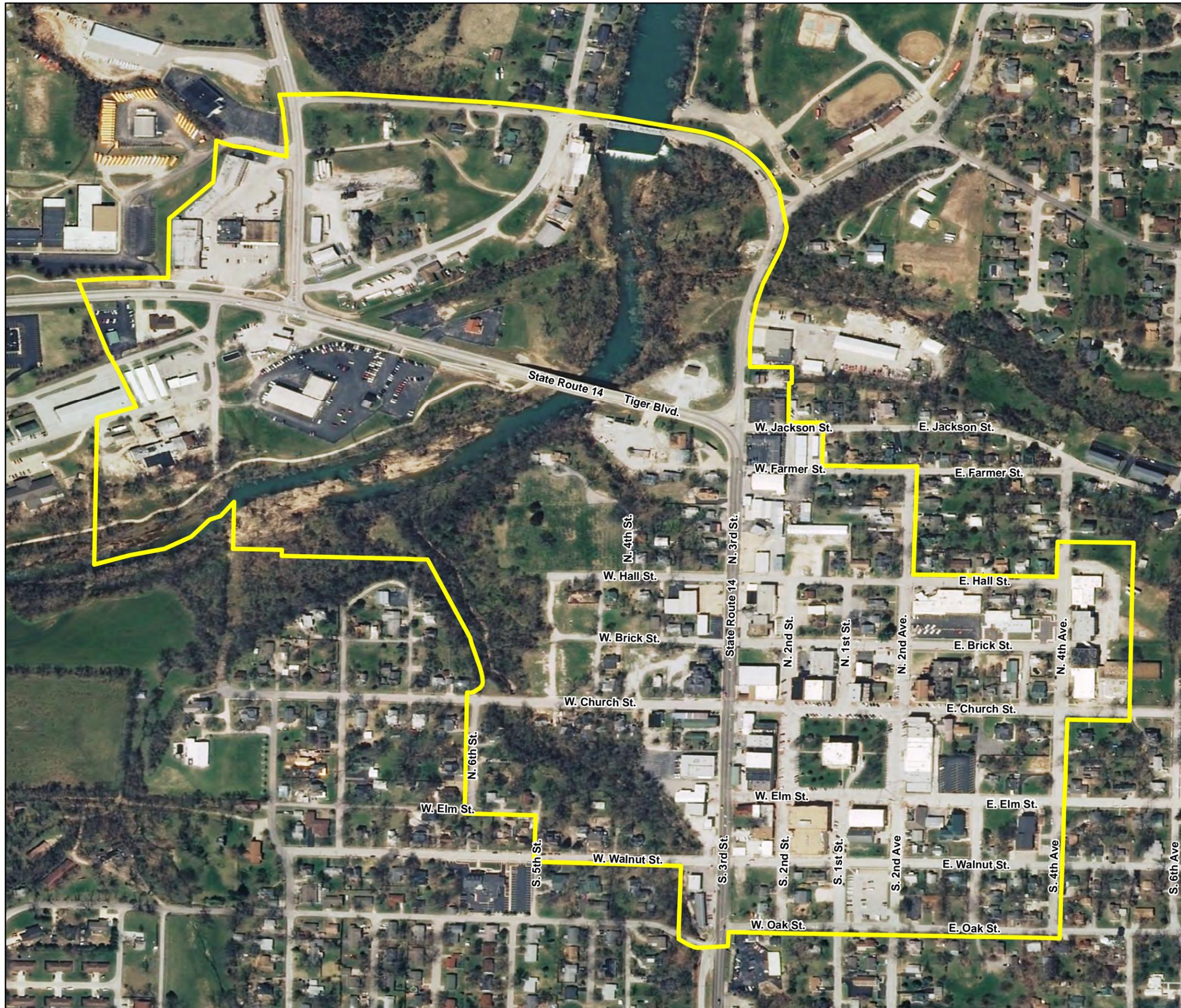


Appendix A-1 Downtown Ozark

Retail Market Analysis
City of Ozark, Missouri

Legend

 DREAM Boundary

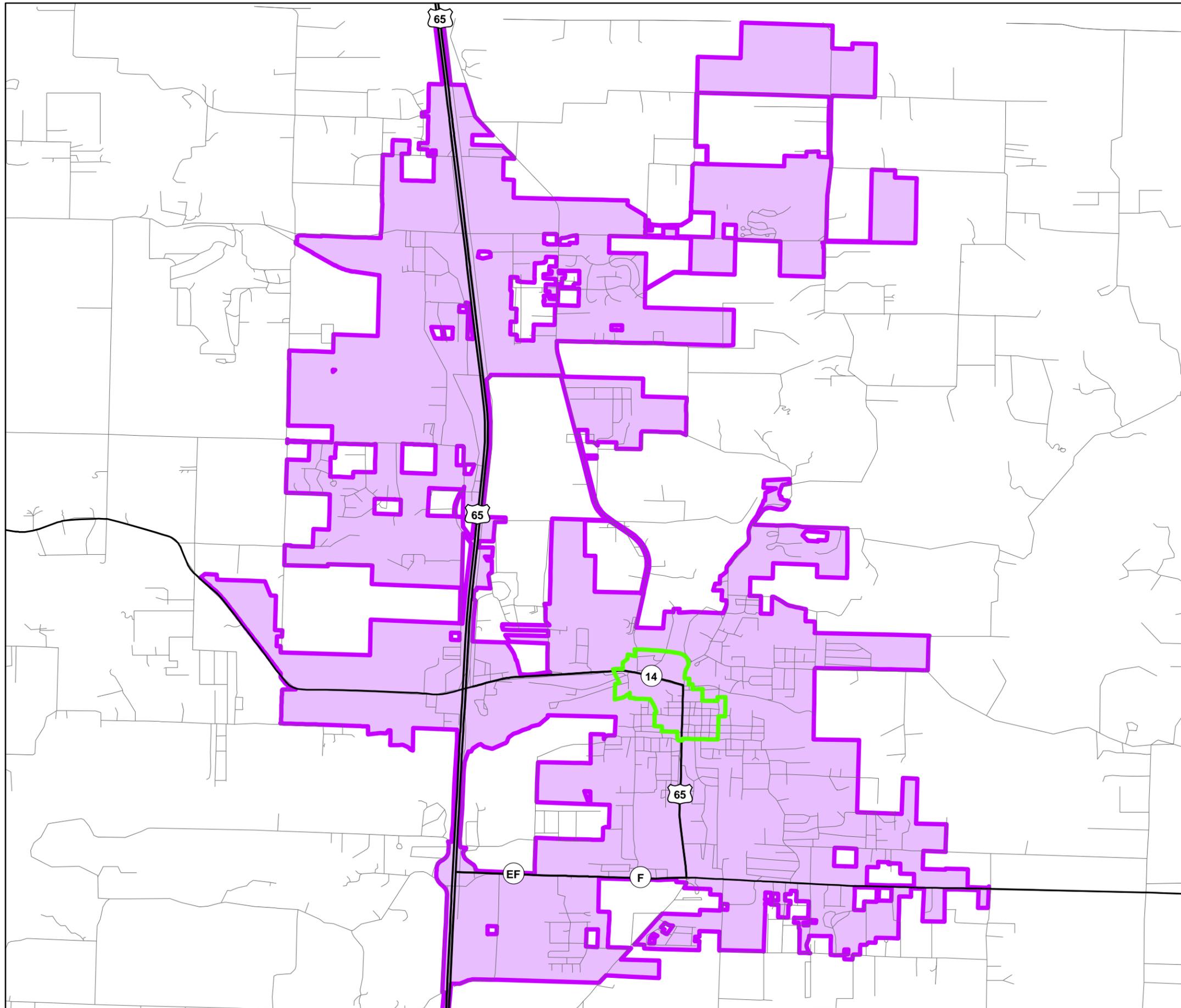


Appendix A-2 Primary Trade Area

Retail Market Analysis
City of Ozark, Missouri

Legend

-  DREAM Boundary
-  Primary Trade Area



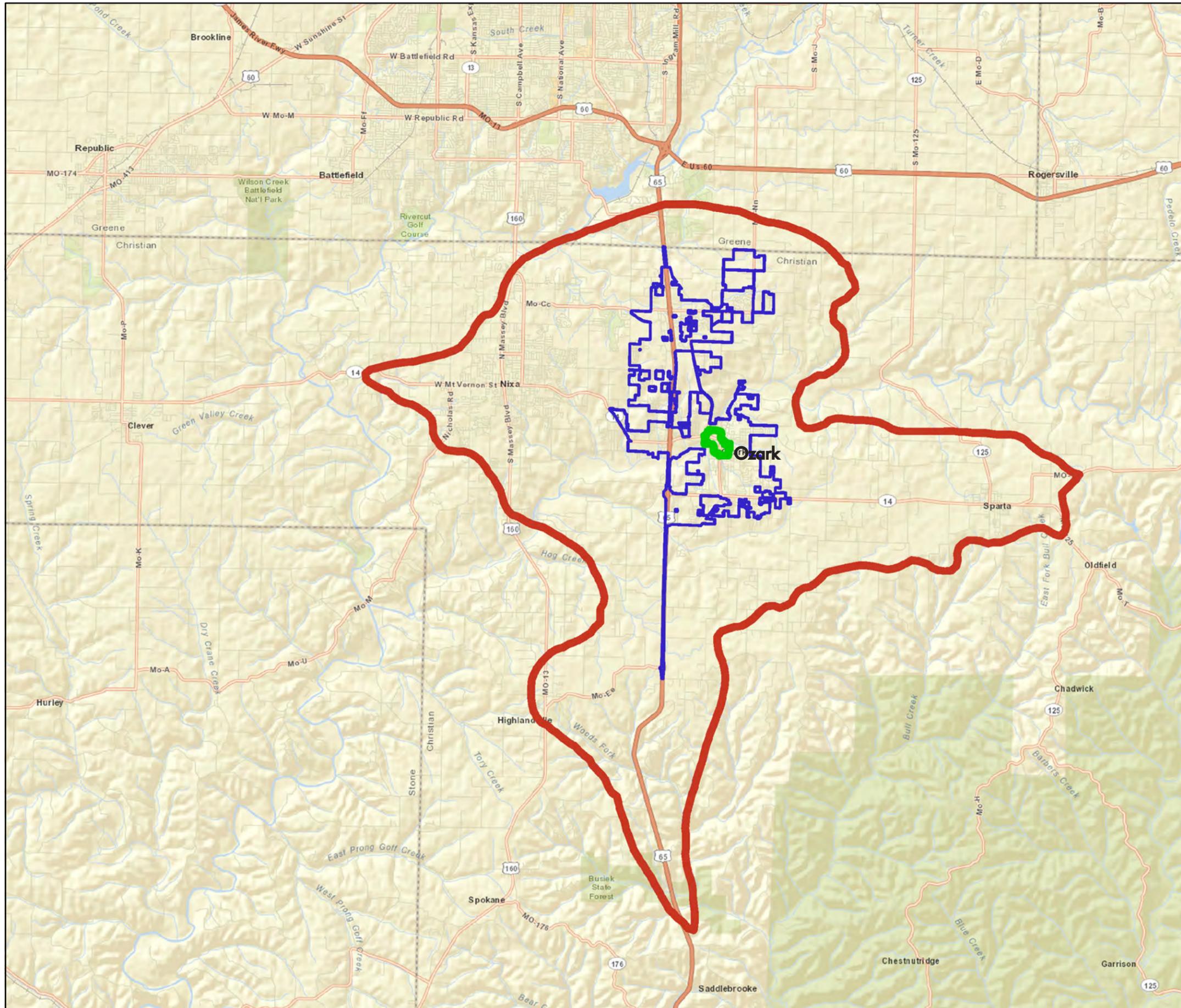
0 0.35 0.7 1.4
Miles



The bottom right corner contains a scale bar showing 0, 0.35, 0.7, and 1.4 miles. Below the scale bar is a north arrow. To the left of the north arrow is the DREAM Initiative logo, which features a stylized city skyline and the text "DREAM INITIATIVE". To the right of the north arrow is the PGAV PLANNERS logo, which features the text "PGAV PLANNERS" in a bold, sans-serif font.

Appendix A-3 Secondary Trade Area

Retail Market Analysis
City of Ozark, Missouri



Legend

-  DREAM Boundary
-  Primary Trade Area
-  Secondary Trade Area



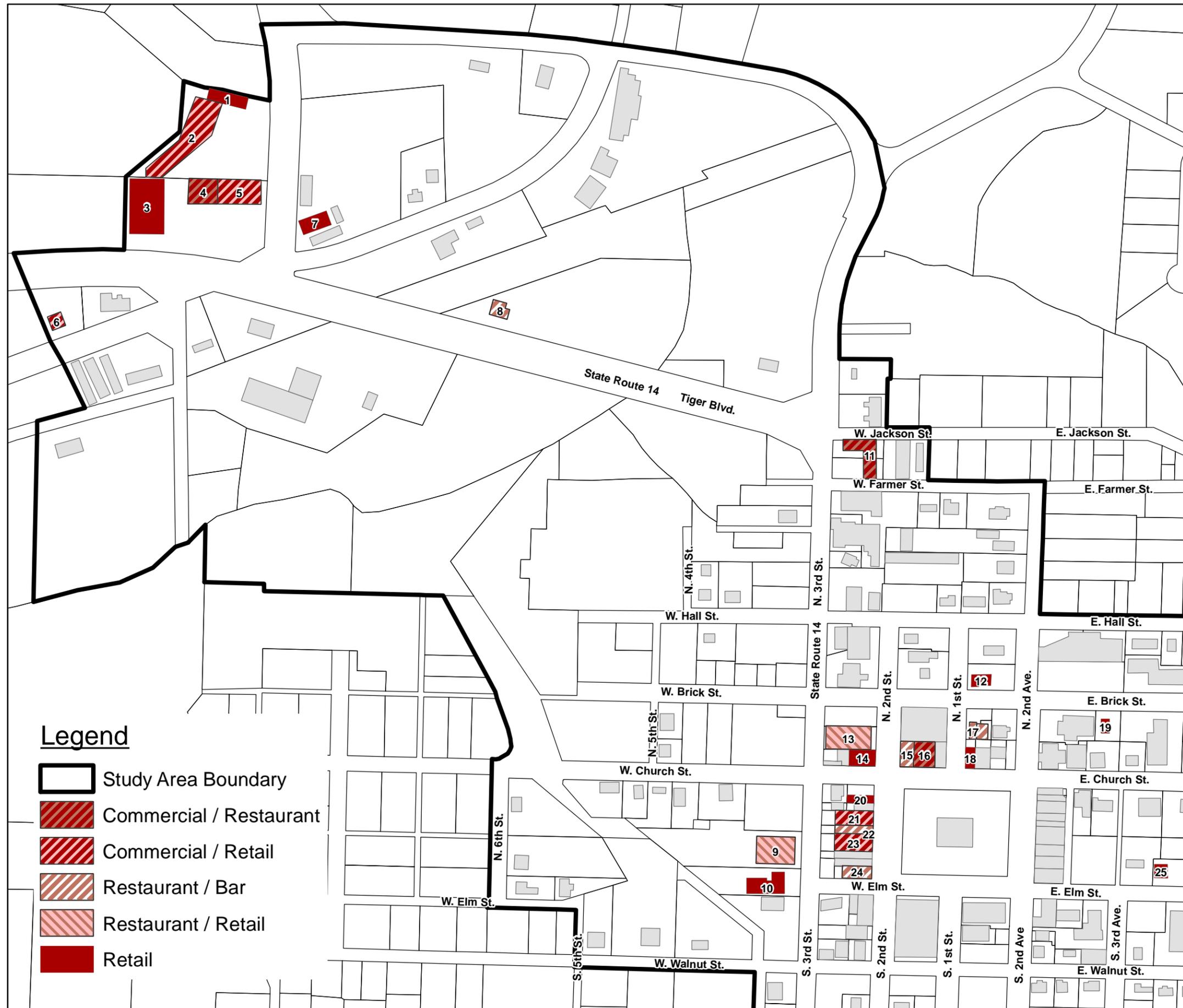
Appendix B
Downtown Ozark DREAM Study Area
Retail Demand & Sales

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	Downtown Businesses	Downtown Trade Area Capture	Downtown Pull-factor
Total Retail Trade and Food & Drink (NAICS 44-45, 722) ¹	\$351,923,051	284	\$296,475,601	\$ 55,447,450	699,277	6,625	\$113,192,054	113	\$99,726,355	\$3,848,250	7	581	2.51
Total Retail Trade (NAICS 44-45)	\$299,551,874	239	\$268,041,211	\$ 31,510,663	318,701	5,639	\$96,278,195	90	\$83,610,489	\$3,182,997	6	564	2.44
Total Food & Drink (NAICS 722)	\$52,371,177	45	\$28,434,390	\$ 23,936,787	380,576	986	\$16,913,859	23	\$16,115,866	\$665,253	1	675	2.92
Furniture & Home Furnishings Stores (NAICS 442)	\$10,494,576	20	\$4,324,673	\$ 6,169,903	62,403	198	\$3,371,662	8	\$2,173,707	\$80,571	0	408	1.77
Furniture Stores (NAICS 4421)	\$6,027,155	5	\$2,178,522	\$ 3,848,633	38,925	113	\$1,947,633	3	\$1,455,548	\$57,260	0	505	2.18
Home Furnishings Stores (NAICS 4422)	\$4,467,421	15	\$2,146,152	\$ 2,321,269	23,477	84	\$1,424,029	5	\$718,159	\$23,312	0	277	1.20
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$14,204,057	16	\$3,250,348	\$ 10,953,709	110,786	267	\$4,584,170	4	\$1,243,597	\$69,363	1	259	1.12
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$17,115,391	21	\$19,563,526	\$ (2,448,135)	(24,761)	322	\$5,396,227	6	\$11,961,050	\$19,711	0	61	0.26
Building Material and Supplies Dealers (NAICS 4441)	\$14,285,162	18	\$17,162,911	\$ (2,877,749)	(29,106)	269	\$4,506,495	5	\$11,442,849	\$12,780	0	48	0.21
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$2,830,229	3	\$2,400,615	\$ 429,614	4,345	53	\$889,732	1	\$518,201	\$6,931	0	130	0.56
Food & Beverage Stores (NAICS 445)	\$61,049,558	36	\$64,127,278	\$ (3,077,720)	(31,128)	1,149	\$19,673,421	11	\$10,299,162	\$935,670	1	814	3.52
Grocery Stores (NAICS 4451)	\$57,241,216	19	\$62,568,956	\$ (5,327,740)	(53,885)	1,078	\$18,445,789	6	\$9,721,878	\$865,488	0	803	3.48
Specialty Food Stores (NAICS 4452)	\$1,350,279	17	\$1,558,321	\$ (208,042)	(2,104)	25	\$435,373	5	\$577,284	\$70,183	1	2,761	11.95
Beer, Wine, and Liquor Stores (NAICS 4453)	\$2,458,064	0	\$0	\$ 2,458,064	24,861	46	\$792,259	0	\$0	\$0	0	0	0.00
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$39,517,980	20	\$39,533,424	\$ (15,444)	(156)	744	\$12,582,642	6	\$17,971,429	\$1,693,616	0	2,277	9.86
Clothing and Clothing Accessories Stores (NAICS 448)	\$27,613,048	17	\$6,035,278	\$ 21,577,770	218,239	520	\$8,912,736	4	\$1,846,890	\$57,407	0	110	0.48
Clothing Stores (NAICS 4481)	\$19,218,042	11	\$3,596,548	\$ 15,621,494	157,997	362	\$6,202,520	2	\$243,330	\$57,407	0	159	0.69
Shoe Stores (NAICS 4482)	\$4,218,866	2	\$754,063	\$ 3,464,803	35,043	79	\$1,363,136	1	\$487,982	\$0	0	0	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$4,176,140	4	\$1,684,668	\$ 2,491,472	25,199	79	\$1,347,080	1	\$1,115,578	\$0	0	0	0.00
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$8,310,848	26	\$3,048,385	\$ 5,262,463	53,225	156	\$2,695,122	10	\$1,380,240	\$32,830	0	210	0.91
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$7,660,874	19	\$2,491,677	\$ 5,169,197	52,282	144	\$2,483,084	7	\$1,122,115	\$18,830	0	131	0.57
Book, Periodical, and Music Stores (NAICS 4512)	\$649,974	7	\$556,708	\$ 93,266	943	12	\$212,038	3	\$258,125	\$14,000	0	1,144	4.95
General Merchandise Stores (NAICS 452)	\$108,398,959	6	\$117,234,525	\$ (8,835,566)	(89,363)	2,041	\$34,942,521	3	\$31,173,713	\$74,633	1	37	0.16
Department Stores Excluding Leased Depts. (NAICS 4521)	\$36,264,540	3	\$39,973,734	\$ (3,709,194)	(37,515)	683	\$11,701,764	1	\$30,914,453	\$0	0	0	0.00
Other General Merchandise Stores (NAICS 4529)	\$72,134,419	3	\$77,260,791	\$ (5,126,372)	(51,848)	1,358	\$23,240,757	2	\$259,260	\$74,633	1	55	0.24
Miscellaneous Store Retailers (NAICS 453)	\$12,847,456	76	\$10,923,773	\$ 1,923,683	19,456	242	\$4,119,694	38	\$5,560,701	\$219,194	3	906	3.92
Florists (NAICS 4531)	\$552,352	3	\$269,606	\$ 282,746	2,860	10	\$173,298	1	\$86,423	\$41,063	0	3,949	17.10
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$3,983,148	19	\$1,125,916	\$ 2,857,232	28,898	75	\$1,278,017	10	\$393,599	\$27,181	1	362	1.57
Used Merchandise Stores (NAICS 4533)	\$743,521	18	\$2,266,971	\$ (1,523,450)	(15,408)	14	\$239,555	12	\$1,321,703	\$133,493	1	9,537	41.29
Other Miscellaneous Store Retailers (NAICS 4539)	\$7,568,435	36	\$7,261,280	\$ 307,155	3,107	142	\$2,428,824	15	\$3,758,976	\$17,458	0	123	0.53
Food Services & Drinking Places (NAICS 722)	\$52,371,177	45	\$28,434,390	\$ 23,936,787	380,576	986	\$16,913,859	23	\$16,115,866	\$665,253	1	675	2.92
Full-Service Restaurants (NAICS 7221)	\$20,276,563	14	\$8,116,823	\$ 12,159,740	193,330	382	\$6,555,890	7	\$4,018,083	\$204,662	0	536	2.32
Limited-Service Eating Places (NAICS 7222)	\$25,155,976	20	\$16,228,187	\$ 8,927,789	141,945	474	\$8,125,713	9	\$9,365,075	\$211,361	0	446	1.93
Special Food Services (NAICS 7223)	\$2,527,486	3	\$2,189,583	\$ 337,903	5,372	48	\$817,095	2	\$1,563,672	\$77,714	0	0	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$4,411,152	8	\$1,899,796	\$ 2,511,356	39,929	83	\$1,415,161	5	\$1,169,036	\$171,516	1	2,065	8.94

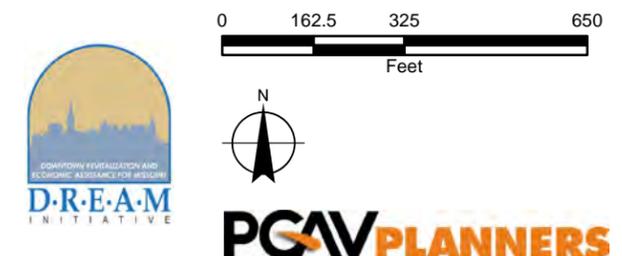
¹ Totals in these categories do not include Auto Sales, Gas Sales, or Non Store Retailers

Appendix C Retail Locations

Retail Market Analysis City of Ozark, Missouri

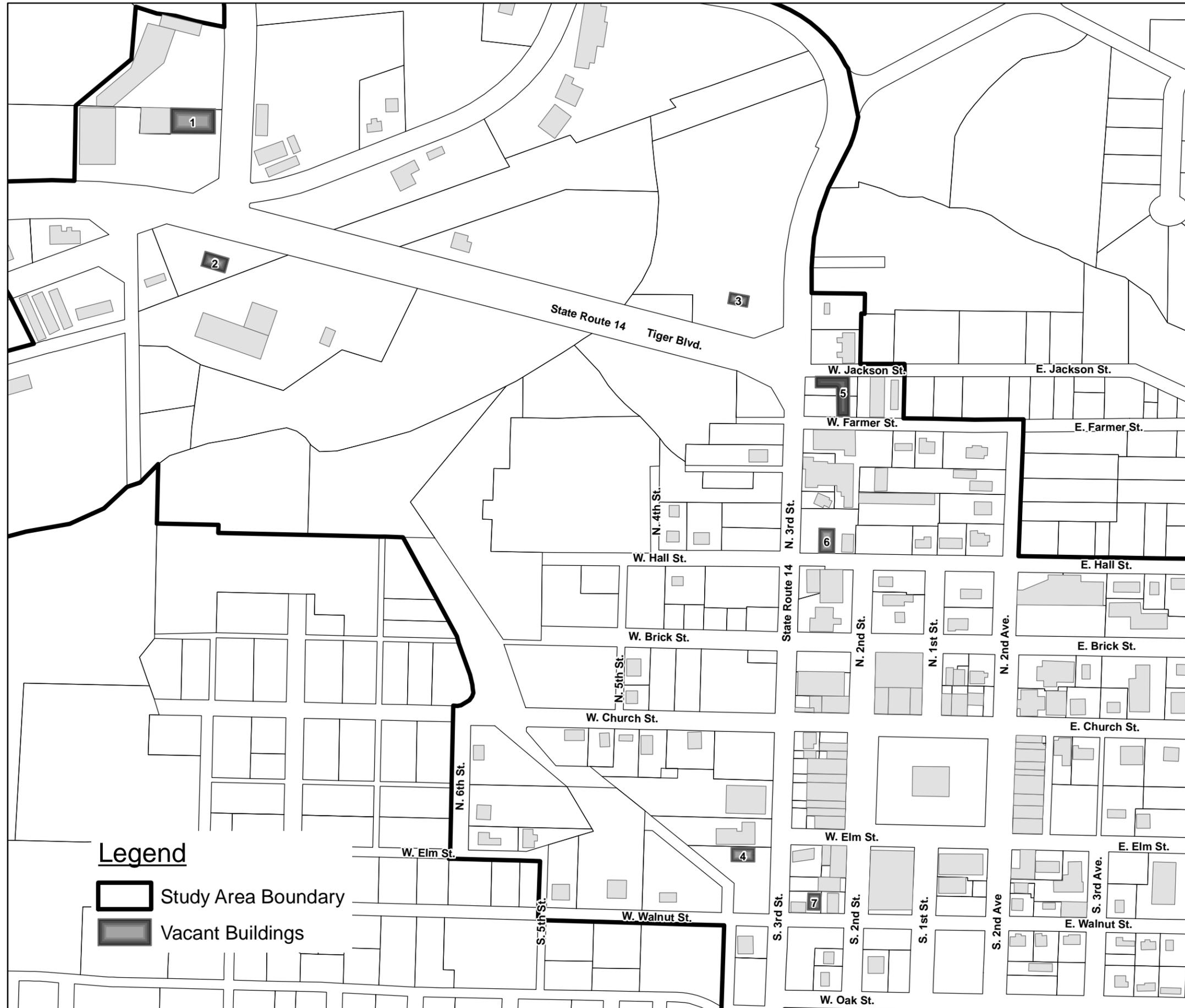


ID	Commercial Location
1	Daisy Mae's Vintage Home
2	Sweet Pea's Antiques and Consignments Harrison House Vintage Goods Doc Holliday's General Store The Chicken Coup
3	Riverview Antique Center
4	Rosie Jo's Café Neat Repeat's Thrift Store
5	Smoker's Outlet LLC Daylight Donuts The Bleau Barn Custom Home Décor
6	Finley River Motors
7	Wheeler Gardens & Florist
8	Golden Dragon Oriental Foods
9	Spring Creek Antiques Spring Creek Tea Room
10	The Avant Garden
11	The Original 3rd Street Pasta & Grill
12	Brown Eyed Girl
13	2nd Street Café
14	The Persimmon Tree
15	Weezie's Upscale Resale
16	Iguana Roja
17	Ben's on the Square
18	Mama's Style Kitchen
19	Downtown Marketplace Torn Boutique
20	Hazel's Flower & Gift Shop
21	Enchanted Parlor
22	Markthouse Café
23	Signature Style
24	Stacey's Sweets
25	Elephant & Castle Fine Arms Company



Appendix D 1st Floor Vacancies

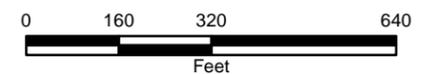
Retail Market Analysis
City of Ozark, Missouri



ID	Address	Available Sq.Ft.
1	907 West Jackson Street	1,400
2	900 West Jackson Street	2,350
3	301 East Jackson Street	1,400
4	103 South 3rd Street	2,000
5	500 North 3rd Street, Suite A	800
6	400 North 3rd Street	2,500
7	109 South Second Street	1,425

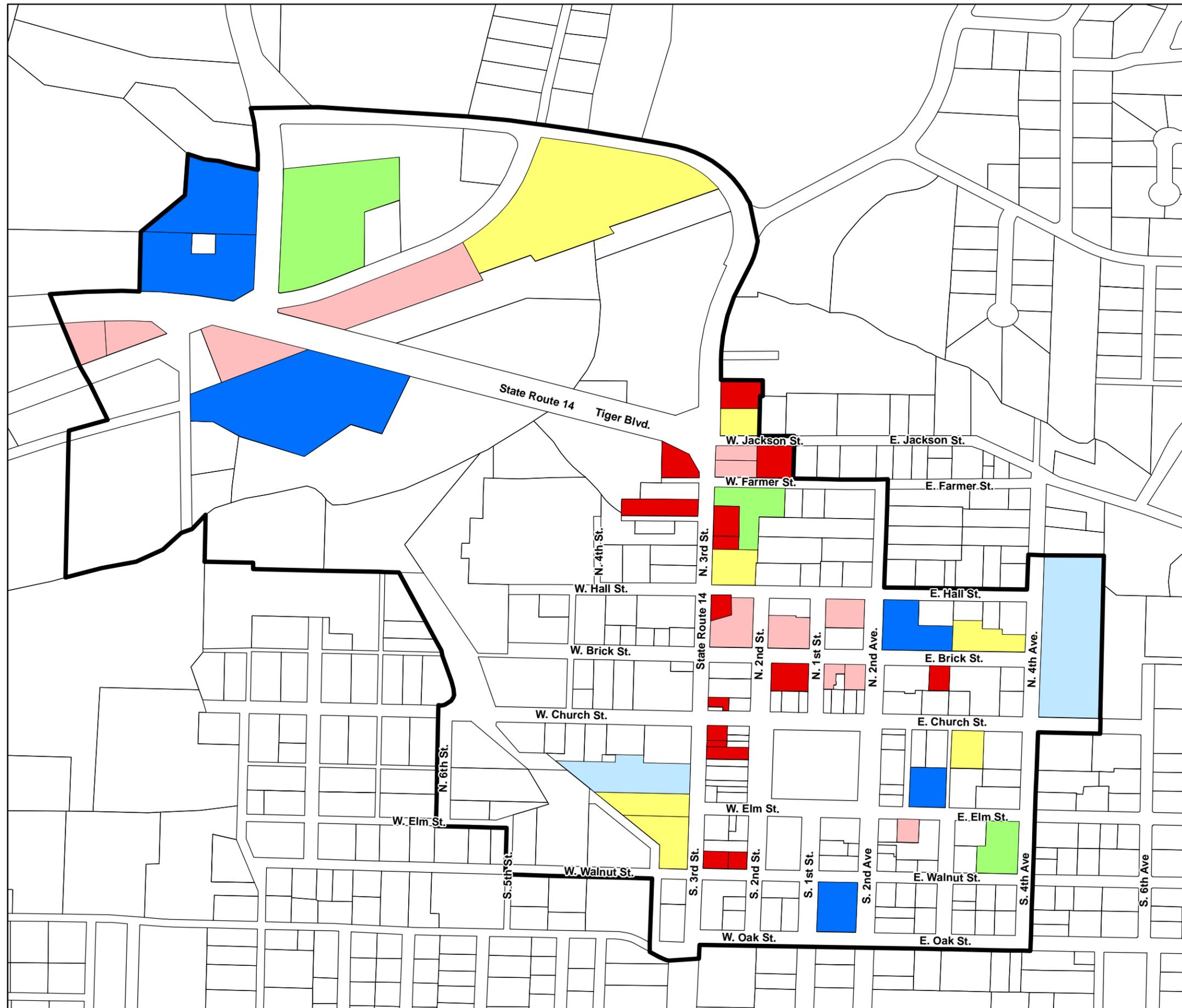
Legend

-  Study Area Boundary
-  Vacant Buildings

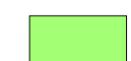


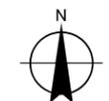
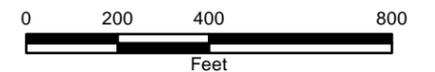
Appendix E Off Street Parking

Retail Market Analysis
City of Ozark, Missouri



Legend

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



Existing Store Checklist

Exterior

Storefront:

- Check Overall Condition, are repairs needed?

- Yes
 No
 Renovation/Remodel Preferred

Description

- Is new paint needed?

- Yes
 No

- Does the paint match the store brand/logo?

- Yes
 No

Description

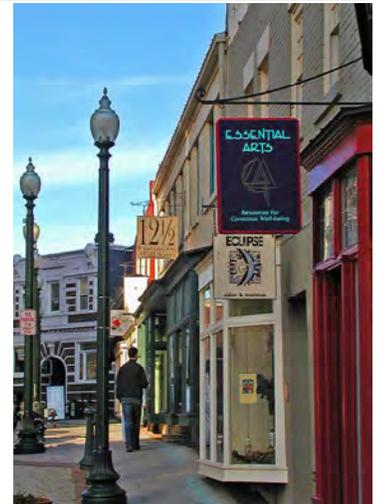
- Is the storefront generally clean?

- Yes
 No

Description

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

- Yes
 No



Existing Store Checklist

Storefront:

- Are there hazards in front of the storefront?

Yes

No

Description

- Is the sidewalk clean and level?

Yes

No

Description

Exterior Signage:

- Does signage occur at eye level (Pedestrian)?

Yes

No

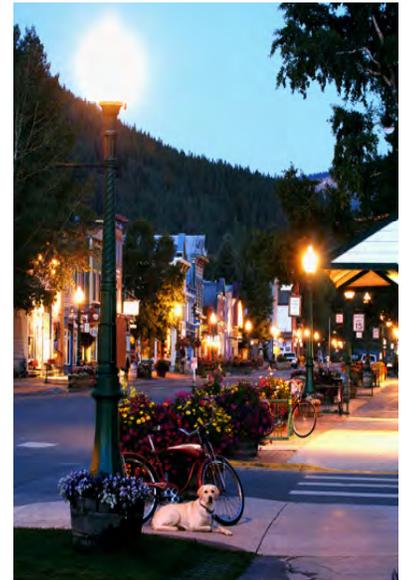
Description

- Does signage occur at car level (Driver)?

Yes

No

Description



Existing Store Checklist

Exterior Signage:

- Do wall signs obstruct the architecture?

- Yes
- No

Description

- Is signage maintained in good condition?

- Yes
- No

Description

- Does the signage complement the building and area?

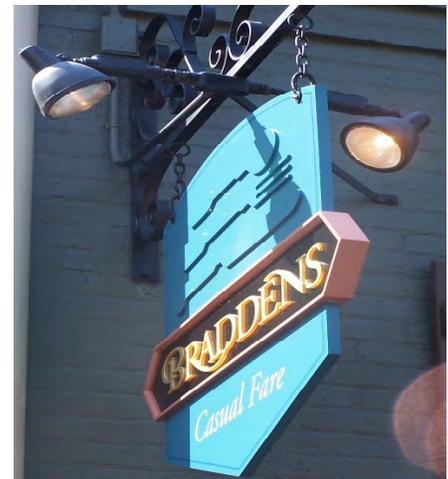
- Yes
- No

Description

- Are the exterior signs lighted (at night)?

- Yes
- No

Description



Existing Store Checklist

Display Windows:

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

Description



- Are window displays rotated every 4-6 weeks?

Yes

No

- Do the displays effectively represent the store brand?

Yes

No



- Are displays including the best/most popular products?

Yes

No

Description



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

Yes

No

Description



- Are the window displays lit at night?

Yes

No

Existing Store Checklist

Interior

Flooring:

- Is the floor worn/hazardous/slippery?
 - Yes
 - No
- Is the floor clean?
 - Yes
 - No
- Is there a 5-10' area without store fixtures at the entry?
 - Yes
 - No
- Is there a walk off area to clean shoes?
 - Yes
 - No

Description

Ceiling:

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

Description

- Is the HVAC duct work clean?
 - Yes
 - No



Existing Store Checklist

Ceiling:

- Are there any other distracting issues?

Description



Lighting:

- Is the lighting adequate to show the merchandise?
 - Yes
 - No
- Is the bulb type appropriate (fluorescent or incandescent)?
 - Yes
 - No
- Are the bulbs the same type?
 - Yes
 - No
- Does the lighting design match the rest of the interior style?
 - Yes
 - No

Description



- Are there adjustable lights to create focal points?

- Yes
- No

Description



Existing Store Checklist

Interior Colors:

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

Yes

No

Description

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

Yes

No

Description

- Are the paint colors consistent from fixture to fixture?

Yes

No

Description

Circulation:

- Does the foot traffic flow smoothly?

Yes

No

Description



Existing Store Checklist

Circulation:

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



Cash Wrap/Register:

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



Existing Store Checklist

Cash Wrap/Register:

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

- Yes
 No

- Is there fixture nearby for impulse purchases?

- Yes
 No

Description



Fixtures & Equipment:

- Does the fixture style match the brand or logo?

- Yes
 No

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

- Yes
 No

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

- Yes
 No

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

- Yes
 No

Description



Merchandising:

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

- Yes
 No

Existing Store Checklist

Merchandising:

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

Yes

No

- Does the product inventory match the internet site?

Yes

No

Description

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

Yes

No

Description

Cleanliness:

- Is the store clean?

Yes

No

Description

- Are boxes cleared and out of sight?

Yes

No

- Are the views into off limits areas blocked?

Yes

No



Existing Store Checklist

Cleanliness:

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

Yes

No

Description



Comfort:

- Is the shop a comfortable temperature?

Yes

No

- Are the entry doors easy to open and close?

Yes

No

- Are the displays and fixtures stable?

Yes

No

- Is music incorporated to make the store feel occupied?

Yes

No

- Does the music reflect the store brand?

Yes

No



Dressing Rooms:

- Is there a bench, wall hook and mirror?

Yes

No

- Are the doors secure and is privacy addressed?

Yes

No

- Are non-selected items returned to stock quickly?

Yes

No



Existing Store Checklist

Dressing Rooms:

- Are the rooms placed to discourage shoplifting?

- Yes
- No

Staff:

- Is the staff helpful and cheerful?

- Yes
- No

Description

- Is the staff educated about the merchandise?

- Yes
- No

Description

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

- Yes
- No

Description

Other Comments.

