DOWNTOWN JEFFERSON

JEFFERSON, IOWA

MARKET STUDY AND STRATEGIES
2015

JEFFERSON
MATTERS:
MAIN STREET

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This report was created by Jefferson Matters: Main Street with technical assistance provided by DPN, under contract by the Iowa Economic Development Authority (IEDA).

PUTTING A PLAN ON THE FUTURE

The economic landscape of traditional downtown and neighborhood commercial districts continues to change and evolve. Expanding retail competition, life-altering technologies, and shifting lifestyle trends will continue to affect business opportunities and the ways in which people interact within the traditional downtown environment.

The key to improving the economic performance of the Jefferson downtown business district ultimately lies in the development and implementation of market-driven business development and marketing strategies that capitalize on our community's assets and emerging opportunities.

Jefferson Matters: Main Street spearheaded the downtown market analysis process to promote an in-depth understanding of local and regional market conditions and trends impacting the downtown district's current economic performance and opportunities for the future. Information and direction gained throughout the market analysis process will provide a sound basis for local decision-making processes and strategies aimed at enhancing the Jefferson downtown business district.

Jefferson was one of seven Main Street Iowa communities selected to receive 2015 market analysis training and technical assistance. The self-help process is engaging local leaders, business persons, residents and stakeholders. Key steps in the process include:

- Site visits and work sessions with the Main Street Iowa and Downtown Professionals Network team.
- The collection and review of background information.
- The analysis and summary of trade area demographic and economic data provided by Main Street Iowa.
- The performance of consumer and business surveys.

An extensive amount of information and data was compiled and analyzed throughout the course of the market analysis process. This report has been prepared to highlight key information and findings that could be particularly relevant to our community's ongoing downtown enhancement efforts.

For more information contact:

JEFFERSON MATTERS: MAIN STREET

Jefferson Matters: Main Street
110 W. Lincoln Way
Jefferson, IA 50129
515.386.3585
director@jeffersonmatters.org

IOWA economic development

This market study report was completed with assistance from Iowa Economic Development Authority (IEDA) and Main Street Iowa. United States Department of Agriculture Rural Community Development Initiative funding and Community Development Block Grant funding were procured by IEDA to underwrite market analysis training and technical assistance furnished to select Main Street Iowa communities in 2015.

The mission of the IEDA is to engender and promote economic development policies and practices which stimulate and sustain Iowa's economic growth and climate that integrate efforts across public and private sectors. The IEDA conducts training and provides technical assistance to designated Main Street programs, including market analysis. These services include capacity building on understanding the regional marketplace and how to develop and proceed locally with an implementation plan.

Downtown Professionals Network, a planning and research firm, was hired by IEDA and worked with Main Street Iowa to provide training, technical assistance and support to local Main Street organization leaders and volunteers.

MAIN STREET IOWA

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Limitations and Disclaimers

Retail market analyses, their components (such as retail sales gap analyses) and derivative business development plans provide important guidance on how a commercial area should, theoretically, be able to perform and on the sales levels businesses should be able to achieve. However, a number of factors affect the actual performance of businesses and commercial areas, including the skills of the business operator, level of business capitalization, the quality of the physical environment, changes in overall economic conditions, the effectiveness of business and district marketing programs, and many other factors. The information in this document is intended to provide a foundation of information for making business development decisions, but it does not and cannot ensure business success.

As is true of all demographic, economic and market studies, our analysis' reliability is limited to the reliability and quality of the data available. Our research assumes that all data made available by and procured from federal, state, county, city, primary and third party sources is accurate and reliable.

Because market conditions change rapidly and sometimes without warning, the information and opinions expressed here represent a snapshot in time and cannot predict or gauge future changes or results.

COMMUNITY PROFILE I JEFFERSON, IOWA

Jefferson is part of a national phenomenon of people returning to the towns or neighborhood of their origins, or places similar. We have become home to a populace that wants quality-of life amenities within an authentic community. Those that have gone away and come back bring with them the latest trends and expectations. Jefferson has many more of these exciting returnees than most communities our size. Because of the presence of a long-time resident's privately held telecommunication company, we are within easy and constant reach of the wider world of Iowa, the nation and the world via state of the art equipment.

We have a forward thinking Mayor and City Council, and the County Supervisors encourage citizen participation. Both the council and the supervisors are active participants in regional economic development through Midwest Partnership, Mississippi Missouri Divide Resource Conservation and Development and Region XII Council of Governments.

As the county seat and at the heart of a major farming community, we consider ourselves a prosperous and vigorous area. We have two large grain cooperatives, a large implement dealer, and expert agronomists and agricultural professionals. We tap into the sustainable agricultural movements with a thriving Farmers Market and Greene County GROWS, a local foods working group.

Jefferson's downtown district has experienced a transformation in the past five years with the completion of streetscape, landscape, lighting and an alley renovation. Several buildings in the downtown have undergone major renovation inside and out. A new public garden has been planted with a nod to Thomas Jefferson, the namesake of our community. Along with a professional live theatre, an updated movie theatre, a live music venue, and an upgrade to a bowling alley, the downtown area is becoming a vital, interesting and unique destination that serves as a social and commercial center for the area. Though not located specifically in our district, the construction of a long anticipated downtown Hy-Vee grocery store has been completed, and Iowa's newest Wild Rose Casino is being built that will also have a new three-story hotel. All of these things combine to position Jefferson into a destination city.

Many of the buildings located in the Main Street district are contributing buildings in the National Historic District. Several have upper-story living possibilities. The Main Street district serves as the hub for the city and county governmental services with city hall located just off the district to the north. The county courthouse is on the list of National Historic Places and sits predominately in the middle of the square. The iconic 168' tall Mahanay Carillon Tower is located next to the courthouse on the square and is accessible to the public. The historic Lincoln Highway runs directly through the Main Street district.

The district is flanked by the middle school; U.S. post office; Carnegie Library; recreation center; a telephone museum; Greene County History Museum; several outdoor public sculptures; the new grocery store; the Raccoon River Valley Recreational Trail and historic train depot.

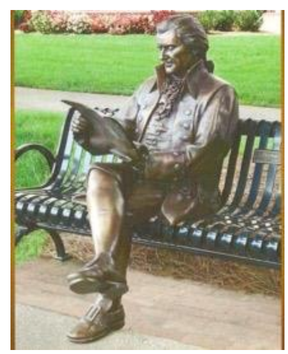
The heart of our community is found in our downtown square. From the observation deck of the iconic Mahanay Bell Tower you can see all of Jefferson, its Main Street District and out to the beautiful prairie of Greene County. Jefferson Matters: Main Street's program continues to be instrumental in our downtown revitalization efforts.

Working collaboratively with the city, the chamber of commerce, the county development corporation, and the county board of supervisors, downtown revitalization from alley renovations to hanging baskets, to historic plaques that celebrate our residents and places, to façade improvements are being completed. All of these things are celebrating our community and what can be found here. Along with the goal of filling empty buildings, business recruitment and façade improvements the Main Street program is becoming an essential economic development tool.

By enlisting other community volunteers, Jefferson Matters: Main Street is everyone involving everyone to insure Jefferson becomes the best it can be.

— **Craig Berry, Mayor**

Development Patterns



The downtown district will soon be enhanced by the addition of way-finding signs to provide visitors with easy access to the downtown area. Signs posted as drivers approach the Main Street district will encourage newcomers and visitors to explore. This will be especially valuable as the community sits just south of Highway 30 where the Wild Rose Casino is located. Signage from the bike path to the east of the downtown will also be vital for people to know what is located in our community and how to find it. There is an ongoing discussion between the City and Chamber of Commerce for an expanded Welcome Center that would provide restrooms, bus parking and information about the town.

Dedicated bike lanes on the street leading to the downtown off the bike path and bike racks found in various locations around the square are provided. Parking exists throughout the Main Street district which is free to the public at all hours of everyday.

An alley renovation has been completed with new gardens, new seating, new lighting and unique public art and original poetry. There are now plans to continue the alley renovations to the other alleys that are found on each side of the square.

Aesthetics and Appearances

New benches, hanging flower pots, public artworks and new lamp posts are all found in the Main Street district along with handsome historical plaques placed throughout the downtown area.

The buildings in the downtown area range in age from early 19th century structures to contemporary buildings. Great examples of Art Deco style, Arts-and-Crafts style, Italianate style, Queen Anne style, and Gothic Revival style are evident.

Three buildings in the district have gone through façade renovations and are examples of historic restoration. A number of buildings located in the district have been “renovated” in the past and reflect various styles of “remodeling” or a “contemporary” look.

Residential areas surrounding the downtown district are generally of the same era as the downtown structures. For the most part, they are well maintained. Several historic homes in this area are in the process of rehabilitation. The district is active up to 15 hours each day. It is considered to be a safe place, being named one of the safest communities in the state of Iowa in 2014.

Signage within the district is being planned and also will be enhanced with decorative directional signs posted prominently on the main thoroughfare. Signage to the district on the highways entering town will be well-placed to direct visitors to locate the downtown historic district.

Business Mix and Climate

The downtown district is fortunate to have an established mix of businesses ranging from retail, personal services, business services to office environments, and dining plus entertainment establishments to cultural activity centers.

The business profile of downtown is as follows:

* Retail – The retail segment of Main Street is comprised of small, independent, locally owned businesses. Ownership is local with some chain-affiliated businesses present. Many have been on the square for more than two decades.
* Apparel and Accessories – There are seven stores which carry a limited variety of clothing options. A ladies apparel store is new to the district and also carries a small selection of shoes for women. Varying price points are found in the district for clothing options from new, higher-end merchandise to a thrift store.
* Home Furnishings – Five stores, including an appliance store, a resale/used store for small items and a store that is offering custom built furniture in the period of 1875 are available.
* Gifts & Décor – Four stores feature a broad range of price points for gifts and home décor, each with their own niche.
* Automotive – There are two businesses that offer sales and service for cars and small motors. There are no car dealerships located in the district.
* Hobby/Sport Store – There is one bike shop offering service for all ability riders. There is one business that is focusing on the youth of the community by offering sports training. There is one shop dedicated to quilting supplies. One store has limited craft supplies.
* Jewelry – One jewelry store has high-end gemstones and also offers jewelry repair and engraving services.
* Florist –One florist is located in the district offering FTD and delivery services.
* Restaurants/Bars – There are twelve businesses in the district that offer food ranging from coffee, bakery items, sit-down breakfast, lunch and dinners, sports bars, carry out services and convenience stores. Food options range from Chinese and pizza to pub fare. There is one privately operated liquor store. There is one seasonally operated ice cream shop. There is no business-class restaurant.
* Personal Services – Nineteen separate businesses focus on providing personal care and range from salon services, to fitness services, optometrists, chiropractic services, elder services and service organization lodges. The public library is located in the district as well as the local radio and the local newspaper office. There are three banks in the district and a funeral home, four separate law firms and several investment and tax consultants are available.

"Having my shop on the historic Bell Tower square for 27 years, I've seen many changes. To reach our goals we need to find ways to attract more of our local community to shop in town along with recruiting businesses to create a new and vibrant shopping destination."

— **Jean Feldmann, Owner**
The Printers Box

- Business Services – There is one large communication business in the district offering cable and phone services to the area. There is also a computer store and small electronic store in the district. There is a painter, printing service, real estate services, education service, insurance, counseling services, print news and radio service.
- Culture & Arts – History Boy Theatre, Sierra Community Theatre and Prairie Blue offer live entertainment and movies to the district. The Greene County Historical Museum brings history to the community with programs throughout the year.
- Community Services – Located in the district are County Courthouse and offices, City offices, and Greene County Abstract. Cultural and civic organizations also make up the district with the Chamber of Commerce, Greene County Development Corporation, VFW Lodge, Area Education Agency, Elks and Does Lodge, and Masonic Hall
- Entertainment – Entertainment venues exist varying from live theatre, bowling, movies and classes offered through the Community Recreation Center and classes offered by a master furniture builder. There are periodic painting classes are offered by a local artist.

The varied businesses create activity during most days around the square. A typical day sees multiple phases of activity that blend together to create the character of the district:

- Early Morning – Early risers take advantage of the two coffee shops, donut shop and full-service breakfast being served at a restaurant beginning at 5 a.m. Runners and walkers are taking advantage of the Rec Center and office workers and retail shop owners are arriving to get a jump on their day.
- Mid-Morning – Retailers open shops; service businesses have full offices and are well into their day.
- Lunchtime – The lunchtime crowd arrives from inside and outside the district. Several locations cater to the lunchtime crowd with much success.
- Afternoon – Shoppers are checking out the variety of shops, hair is getting cut, taxes are being prepared, and errands are completed.
- Late Afternoon - School is out and the coffee shops and bakery are seeing an uptick in their businesses as well as the ice cream shop in the warmer months. The library is a hub of activity as well as the recreation center and fitness business that has just opened their doors for the youth of the community. The Farmers Market is setting up in the summer on the courthouse grounds.
- Early Evening – Workers heading home take advantage of a few happy hours while early diners are deciding which restaurant to eat supper. In the summer, adults are eating a meal served by a local church or nonprofit during the Famers Market on the courthouse grounds.

* Mid-Evening – The theatre has opened up for the latest Hollywood movie; bowlers are coming in for either open bowling or league bowling. And on some evenings, the crowds are gathering for a live theatre or music event. Inspiring artists are headed to a painting class.
* Late Evening – The crowds accumulate at the bars concentrating their focus perhaps on a sporting event, a live band or performer or live theatre production.
* Late, Late Night – Some drinking establishments pour until 2 a.m. when the streets rollup for a few hours and the cycle begins again.

Four buildings have been acquired within the last five years by people who have a vested interest in seeing the district improve and believe in the downtown concept. These owners have rehabilitated their properties to attract business and walk-in sales but also honor the building's past. One of these business owners has rehabilitated their upper-story living space and rents the space out to a young professional. One of the owners lives above their store in an apartment that needed no rehabilitation, one houses a tax accountant in the upper story and the last of the four are in the process of rehabilitating the upper-story. There are also some upper-story units that have been occupied in other buildings for several years.

In the spring of 2015 Jefferson Matters: Main Street collaborated with Greene County Development on a successful two-day "Empty Building Tour." Six buildings on the square were open for tours by potential developers and business owners as well as interested members of the public. The tour created awareness of possibilities and opened conversations about restoration by the City, investors and the public. As a result the City has purchased one of the properties and restoration has begun. Subsequent tours are in the planning stage.

Competitive Analysis

The Jefferson Main Street District while unique in many ways is still a small town dealing with many outside pulls for shoppers to leave the district.

Within Jefferson:

* The Main Street's square remains a hub of retail activity.
* The "feeling" of the past is present in the shops and square.
* It is becoming a destination for ladies' day trips and bus tours with a tearoom, unique coffee shops, quilt shop, History Boy Theater and RVP~1875, a period furniture shop that gives tours. In the summer, one can stroll through lovely Thomas Jefferson Garden located in the district.
* The Bell Tower is located on the square with extended hours.
* An active art group is bringing public art and alley renovation to the square utilizing playful design.
* Jefferson is the county seat for a county of 10,000.

* The Recreation Center draws many people throughout the county. During the school year, it draws people from a variety of counties for sporting events after school and on weekends.
* A new Hy-Vee grocery store located only a block off the city square draws people from throughout the county.
* A new McFarland Medical Clinic located only a block off the city square draws people from throughout the county.
* An active Farmers Market is growing every year in popularity.
* Several well–attended festivals happen in the downtown area using the courthouse square and the surrounding blocks.
* Greene County Medical Center completed a $20 million addition to their facilities in conjunction with Unity Point.
* Wild Rose Jefferson resort complex with Cobblestone Hotel & Suites is located on Jefferson's north side.

Outside of Jefferson:

* Jefferson is only 25 miles in either direction from communities that have a Wal-Mart and 40 miles from a community that has an indoor shopping mall and a university that many have allegiance to on game days.
* Deal's Apple Orchard draws thousands to the area throughout the spring, summer and fall. John 15 Vineyard attracts many.
* Several manufacturing facilities such as Scranton Manufacturing, American Athletic, Inc./Spalding, Power Lift, Bauer Built Mfg. & John Deere throughout the county have expanded.

There are many positive actions that have been taken in the last two decades to position downtown Jefferson as a vital, growing, desirable place to be. Assets and features to be capitalized upon include:

* Keeping the unique character of the district through the establishment of locally owned businesses with unique origins.
* Developing public art for art enthusiasts to enjoy both from the community and for those across the Midwest to visit.
* Developing a partnership with Grow Greene County and Greene County Development Corporation and Wild Rose Jefferson Casino & Resort to encourage and support the downtown area.
* Involving industry partners more in the downtown district will have immediate and ongoing benefits as they encourage and support employees to visit as well as enhancing their recruitment efforts.
* Continuing high levels of cooperation between the city and county officials will be required in order to accomplish positive growth and change both in industry and small business.
* Continued, conscious planning of events and activities that center the city's population in the downtown will maintain connection and ongoing support of improvement programs.

"We have the best of worlds, living and working in downtown Jefferson. We live above our shop and are in walking distance to other local businesses if we need something quickly. There is no excess cost of housing since our shop is just downstairs! We can see the square at all hours of the day and night and feel right in the mix. We are happy to be a part of a larger community when there are festivals and events right outside our door!"

— **Ora Stevens & Nhan Nguyen**
Residents and Co-Business Owners
Jefferson, Iowa

Strategies that build upon the downtown's strengths are aimed at mitigating weaknesses and threats which include:

* Being by-passed in the retail sphere by technology. Main Street businesses must be tech-savvy in their marketing and advertising and embrace social media. They cannot be stuck in dated methods, but must adapt to their customers' habits while retaining the best of the brick and mortar.
* Re-thinking the age of the customers available in the community and their lifestyles (i.e. when they shop) has to be addressed by all of the retailers in the district.

The continuing improvement of the historic character of the downtown could augment the district's importance in the area as a "place to be." With the addition of a casino out on Highway 30 the stress of further improvement of facades and total building renovations will need to be at the forefront of both Main Street and the City of Jefferson.

* The development of the other three alleys located around the square will need to be carried forward, making those spaces functional as well as a third place for people to explore unique public art.
* Great signage is a must for the community beginning on the highway. Again due to the Wild Rose Casino being located on Highway 30, it will become imperative to install these signs to direct people to the downtown, the heart of the community, to experience what we have in the Main Street district. As traffic on the bike trail is expected to dramatically increase, signage from the bike trail to the center of the square will become vitally important.
* The mini-grant program for help to businesses provided by the local Main Street needs to continue; however, that alone will not be enough to change the facades of the buildings. Many of the district's buildings are at a tipping point and the city and Main Street will need to work together on the Community Development Block Grant. It will help give the downtown area a fresh, clean look, while preserving and restoring the unique character of each of the historic buildings participating in the project. A snowball effect of restoration and "reawakening" of the downtown by having the empty building tour is hoped for.
* A plan for maintaining cleanliness on the streets is an ongoing issue, particularly the large amount of refuse created by the indoor smoking ban. In wintertime, the city has effective snow removal strategies keeping our downtown safe. The small gardens found in the alleys will need upkeep as well as the hanging baskets to keep the city looking fresh and up to date.
* Parking is not an issue for cars but as bike traffic changes due to increased popularity of the Raccoon River Valley Trail car/bike traffic will become a problem. Clearly marked bike lanes from the trail through the residential street leading to the Main Street district will be necessary not only for the safety of the bikers but for all people that are navigating the streets in the downtown area. Sufficient bike racks, benches and tables will need to be installed if we want to entice people off the bike trail to explore our Main Street district.
* Remaining competitive, if not by price then by service and convenience, and stressing the positives the merchants are bringing to the shopping experience in a small community will make it not "that place to drive away from" but rather "that place to be."

Downtown Jefferson Market Snapshot

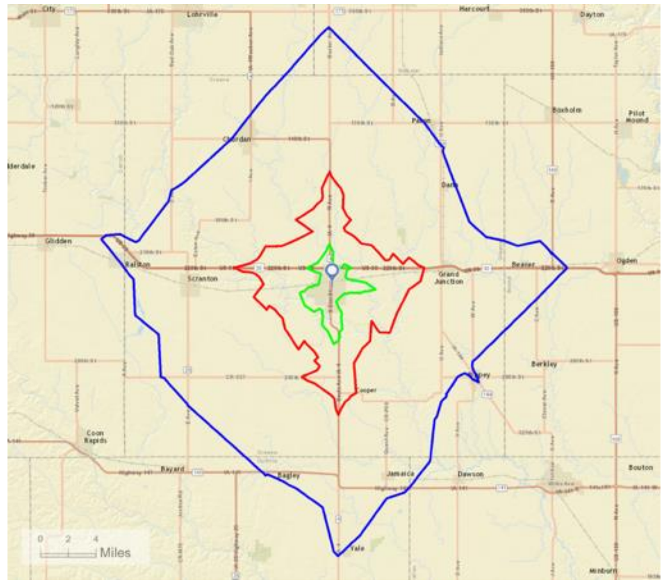
Demographic Snapshot

The demographic snapshot compiled for the Downtown Jefferson Drive Time Markets benchmarks and tracks changes in the marketplace. Analysis and comparison of data for the three drive time areas reveal:

- ► Trends and projections for the population and households within the drive time geographies anticipate five-year decreases in population of about 2 percent; and five-year decreases in households of 1.4% to 1.7%. At the state level, population and number of households are expected to grow at five-year rates of 2.8% and 3.1%, respectively.
- ► Consistent with the "Greying of America" phenomenon, average household size is anticipated to decrease slightly across the drive time areas and median age is expected to increase by 1.2 to 1.4 years in the various drive time areas through 2019. Median age for the Iowa population in 2014 is estimated at 38.5 years and is expected to reach 38.9 years by 2019.
- ► The concentration of renter-occupied housing units is consistent across the drive time areas – estimated at about 22% to 23% in 2014. About 13% of all study area housing units in the drive times are classified as vacant in 2014 and a small increase in vacant units is expected through 2019. State figures for 2014 assigned a vacant status to 8.9% of all housing units, and the figure is expected to rise to 9.0% by 2019.
- ► Overall, median, average and per capita income figures for the drive times are lower than those estimated for the state. Median household income, highest in the twenty-minute drive time area, is expected to increase across the drive time geographies by about 14% to 21% through 2019, with the highest rate of growth expected to occur in the five-minute drive time. Projected five-year growth rates for income in the drive time areas generally compare favorably and, in many cases, even exceed growth rates predicted for the state.

Iowa Income	2014	2019	+ %
Median HH	$52.4K	$61.3K	16.9%
Average HH	$65.7K	$76.7K	16.8%
Per Capita	$26.7K	$31.3K	17.1%

Note: The complete Downtown Jefferson Market Snapshot is available as a supplemental document to this report.



Downtown Jefferson Drive Time Market

Fast Facts

Population	**5 Min**	**10 Min**	**20 Min**
2000 Census	4,711	5,190	10,134
2010 Census	4,355	4,781	9,237
2014 Estimate	4,250	4,666	9,055
2019 Projection	4,155	4,562	8,872
Change 2014—2019	-2.2%	-2.2%	-2.0%
Households	**5 Min**	**10 Min**	**20 Min**
2000 Census	1,966	2,142	4,151
2010 Census	1,910	2,081	3,969
2014 Estimate	1,874	2,043	3,913
2019 Projection	1,844	2,009	3,857
Change 2014—2019	-1.6%	-1.7%	-1.4%
Median HH Income	**5 Min**	**10 Min**	**20 Min**
2014 Estimate	$46,511	$46,771	$49,882
2019 Projection	$56,346	$56,525	$57,074
Change 2014—2019	21.1%	20.9%	14.4%

Source: Esri

Lifestyle Profile

The Esri Community Tapestry consumer segmentation system adds color to the “black& white” demographic description of residents and households within drive time areas.

The Tapestry Household Distribution Report identifies prevalent segments and describes the population’s likes, dislikes, lifestyles and purchase behaviors for households within the defined geographies. The information can be particularly helpful for assessing opportunities for business growth and for designing marketing strategies and messages to reach targeted consumer segments.

The following tables show concentrations of Tapestry household segments found within the Downtown Jefferson 5, 10 and 20-minute drive time areas.

5 Minute Drive Time Households	Count	Pct.
Midlife Constants	1,374	73.3%
Prairie Living	500	26.7%
Count/Pct. of 5 Minute Drive Time	**1,874**	**100.0%**

10 Minute Drive Time Households	Count	Pct.
Midlife Constants	1,398	68.4%
Prairie Living	644	31.5%
Heartland Communities	1	0.1%
Count/Pct. of 10 Minute Drive Time	**2,043**	**100.0%**

20 Minute Drive Time Households	Count	Pct.
Prairie Living	1,902	48.6%
Midlife Constants	1,398	35.7%
Heartland Communities	1,107	14.8%
Green Acres	581	0.8%
Count/Pct. of 20 Minute Drive Time	**4,988**	**100.0%**

Information on Esri Tapestry methodology along with descriptions for prevalent Downtown Jefferson Drive Time Market Tapestry segments is available in the complete Downtown Jefferson Market Snapshot—a supplemental document to this report; and at the Esri website at: http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm.

Top Consumer Lifestyle Segments | Esri 2014

Midlife Constants (#1 in 5- and 10-Minute Drive Times)

Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

Market Profile

- Prefer practical vehicles like SUVs and trucks (domestic, of course).
- Sociable, church-going residents belonging to fraternal orders, veterans’ clubs and charitable organizations and do volunteer work and fund-raising.
- Contribute to arts/cultural, educational, political, and social services organizations.
- DIY homebodies that spend on home improvement and gardening.
- Media preferences: country or Christian channels.
- Leisure activities include scrapbooking, movies at home, reading, fishing, and golf.

Prairie Living (#1 in 20-Minute Drive Time)

Prairie Living is Tapestry Segmentation’s most rural market, comprising about 1 percent of households, located mainly in the Midwest, with a predominance of self-employed farmers. These agricultural communities are not diverse, dominated by married-couple families that own single-family dwellings and many vehicles. Median household income is similar to the US, and labor force participation is slightly higher. Faith is important to this hardworking market. When they find time to relax, they favor outdoor activities.

Market Profile

- Many own a truck, riding lawn mower, and ATV/UTV and have a satellite dish.
- They purchased plants and seeds in the past year for their vegetable garden, where their tiller comes in handy.
- They favor banking in person, have noninterest checking accounts, invest in CDs (more than 6 months), and have term/whole life insurance.
- They are pet owners.
- Leisure activities include fishing, hunting, boating, camping, and attending country music concerts.
- Residents prefer to listen to faith and inspirational, as well as country music on the radio.
- They read home service, fishing/hunting, and automotive magazines.
- They contribute to religious organizations and belong to religious clubs.
- Walmart is a favorite shopping stop; Subway is a favorite eating spot.

Retail Performance

Esri's Retail MarketPlace data provides a direct comparison between retail sales and consumer spending by industry. To capture a snapshot of an area's retail market place, the leakage and surplus factor summarizes the relationship between supply (retail sales by businesses) and demand (consumer spending by household). Deviations from potential sales may reveal areas of opportunity in the trade area's retail sectors, keeping in mind any extenuating circumstances that may be driving the results.

All estimates of actual sales (supply) reflect current dollars derived from receipts of businesses primarily engaged in selling merchandise. Potential sales (demand) is estimated by using Esri's consumer spending data which provides estimated expenditures for more than 700 products and services that are consumed by U.S. households. The estimate of a trade area's demand is based upon estimated expenditures by households within the trade area.

Leakage within a specified trade area represents a condition where supply is less than demand. Retailers outside of the trade area are fulfilling demand for retail products. Surplus within a specified trade area represents a condition where supply exceeds demand. Thus retailers are attracting customers that reside outside the trade area.

Sales Surplus and Leakage Estimates

Total Retail Trade and Food & Drink demand versus sales estimates for the drive times show sales leakage at all drive time geography levels, ranging from about $3.0 million for the ten-minute drive time to nearly $32.5 million for the twenty-minute drive time area.

Sales Surplus & Leakage ($MM)	5 Minutes	10 Minutes	20 Minutes
	Surplus/ (Leakage)	Surplus/ (Leakage)	Surplus/ (Leakage)
Total Retail Trade and Food & Drink (NAICS 44 – 45, 722)	($8.5)	($3.0)	($32.5)
Total Retail Trade (NAICS 44 – 45)	($7.4)	($1.8)	($28.1)
Total Food & Drink (NAICS 722)	($1.1)	($1.2)	($4.4)

Drive time estimates and patterns for Retail Trade are consistent with overall figures, with sales leakage ranging from about $1.8 million in the ten-minute drive time to more than $28 million in the twenty-minute drive time area. Notably, Retail Trade leakage figures reported in the drive times are largely influenced by substantial leakage occurring in the Gasoline Stations and General Merchandise categories.

Estimates for Food & Drink sector sales in comparison to projected demand are consistent with overall retail patterns, with sales leakage of about $1.1 to $4.4 million reported at the five- and twenty-minute drive time levels, respectively.

Retail Sales

Drive Time Market ($MM)		
5 Min	10 Min	20 Min
$40.7	$51.0	$74.6

Source: Esri Retail MarketPlace Report 2014

Totals shown for all North American Industrial Classification System (NAICS) Retail categories (NAICS 441—454) and Foodservice and Drinking Places (NAICS 722).

Retail Pull

Categories and subcategories with some of the highest and lowest pull factors—an indication of relative strength or possible opportunities in the market—include:

Category/Subcategory	Factor*
▲ Beer, Wine & Liquor Stores	58.8
▲ Other Motor Vehicle Dealers	58.6
▲ Electronics & Appliance Stores	49.1
▲ Auto Parts, Accessories & Tire Stores	66.8
▲ Used Merchandise Stores	49.8
▲ Florists	41.6
▲ Health & Personal Care Stores	41.3
▲ Specialty Food Stores	32.3
▲ Lawn & Garden Equip & Supply	28.3
▲ Full-Service Restaurants	11.2
▼ Shoe Stores	(100.0)
▼ Book, Periodical & Music Stores	(100.0)
▼ Special Food Services	(100.0)
▼ Drinking Places - Alcoholic Beverages	(100.0)
▼ Other General Merchandise Stores	(93.6)
▼ Other Miscellaneous Store Retailers	(64.0)
▼ Clothing Stores	(61.1)
▼ Office Supplies, Stationery & Gifts	(52.5)
▼ Furniture Stores	(43.2)
▼ Home Furnishings Stores	(37.8)

* Factor shown for five minute drive time area

Source: Esri

The factor is a measure of the relationship between supply and demand that ranges from +100 (total surplus) to -100 (total leakage). A positive value represents a surplus of retail sales (often indicative of a market where customers are drawn in from outside the trade area).

COMMUNITY INSIGHTS

Findings based on Spring 2015 surveys of Jefferson business owners and operators and their customers will be used by Jefferson Matters: Main Street to produce strategies to help improve the town's social and economic well-being by capitalizing on the unique identity, assets and character of Jefferson's historic business district, which is anchored by the nearly 100-year-old Greene County Courthouse at its center.

The surveys' results combine answers obtained by the intercept method (handwritten responses) and by online responses. The total customer sample numbered 376, an excellent number from which to derive meaningful data. The sample comprised 103 intercept and 273 online responses. Eighty-three business persons returned surveys; 140 surveys were distributed. In both surveys, not all questions were answered.

- Female consumers comprised 73 percent of the total (354) respondents; 27 percent were male.
- Consumer respondents 24 years of age or younger answered questions online only, for a total of about 16 percent of the total sample.

Traffic Generators and Visit Frequency

Overall visit rates indicated by consumer intercept survey respondents show that more than 85% visit the downtown on a daily or weekly basis to do errands or for office and service-related purposes. The results demonstrate the impacts and captive nature of the local market.

Consumer intercept survey results show visitor frequency for those shopping in the downtown area on a daily or weekly basis, measured at more than 69%, illustrates strong loyalty in the local marketplace. Respondents also visit the downtown area for eating, drinking and entertainment with high frequency, with 58% attracted to the downtown area for those purposes on a daily or weekly basis.

Marketing strategies designed to increase and maintain visit frequency across the various business sectors should serve to heighten awareness for the full range of products and services available, while cross-marketing and promotion strategies should consider opportunities to intercept visitors, and for the delivery or placement of messages such as posters, banners, brochures, etc. at both retail and non-retail high-traffic generating businesses and attractions.

Table 1

Question

How far is your residence located from Downtown Jefferson?

Consumer Intercept Responses	Percent
In downtown or within 2 miles	66.0%
2 to 5 miles	19.4%
5 to 10 miles	7.8%
More than 10 miles	6.8%

Source: 2015 Downtown Jefferson Consumer Intercept Survey.

Table 2

Question

How often do you visit Downtown Jefferson…

Frequency - Weekly	Percent
To do errands or for office and service-related purposes??	85.3%
For eating, drinking and/or entertainment?	57.5%
To shop?	68.7%

Source: 2015 Downtown Jefferson Consumer Intercept Survey.

Media Preferences and Effectiveness

Consumer rankings of media preferences demonstrate the exceptionally strong presence of the local print publication and the growing influence of the Internet and social media applications as a resource for news, for researching products and services, and for communicating with clients.

The Internet can be a particularly valuable resource for businesses because it provides the potential for businesses to expand their trade area well beyond local or regional geographies. Businesses with collectible, specialty, and custom merchandise lines, in particular, can use the Internet, and sites such as Amazon, eBay and Etsy, to market to the entire United States or even globally. Even traditional retailers and businesses carrying “staple” products are reaping benefits as, more and more, consumers use the Internet to “shop and compare” products and services, and then use it – in much the same way previous generations of consumers used the Yellow Pages – as a resource to find a local outlet or vendor where they can make their purchase.

Downtown Jefferson’s promotion and collaborative marketing efforts should continue to consider how the Internet and various social media applications might be most effectively used to communicate with consumers and to further downtown promotional goals. The growing popularity of Facebook, Twitter and other social media applications is evident in consumer survey results that show 46% of all respondents selected Social Media and 29% selected Internet Websites as one of their top two sources for news and information.

The Downtown Jefferson branding system should continue to be developed and consistently deployed across a variety of medium—including Internet-based sites and applications—to enhance further awareness and to create business connections to the Downtown Jefferson brand. Businesses should be encouraged to “plug in” to the Jefferson Matters: Main Street website and social media sites which serve as portals, and to apply branding elements and extensions in their own electronic and print media applications to reinforce connections with the brand—and build brand equity.

Strategies and applications designed to use the Jefferson Matters: Main Street and Greene County Chamber and Development Facebook pages as portal sites, to feature and easily share postings highlighting new and unique products, local personalities, special offers, events and other features which reinforce the Downtown Jefferson brand should continue. Facebook advertising applications should continue to be employed and experimented with to build traffic to these sites, and businesses should be encouraged to maintain fresh content and to share links and posts to leverage traffic generated at the Downtown Jefferson portal pages and the pages of other downtown area businesses.

Businesses should also be encouraged to experiment with other social media applications, where appropriate. For example, thirty percent or more of consumers surveyed indicated they regularly use Pinterest and/or YouTube on a regular basis, yet only 7% of businesses surveyed currently have a presence on at least one of these platforms.

Table 3

Question | Consumer Survey

Of the following, which two (2) media and information sources do you most rely on for Jefferson area news and information?

Top Consumer Survey Responses	
Newspaper	64.7%
Social Media (Facebook, Twitter, etc.)	45.8%
Internet Website(s)	28.6%
Radio	17.8%
Television	14.6%

Source: 2015 Downtown Jefferson Consumer Surveys.

Table 4

Question

Which of the following social media networks or online applications do you regularly use?

Top Consumer Survey Responses	
Facebook	84.3%
Pinterest	40.4%
YouTube	29.9%
Instagram	20.9%
eBay	16.2%
Etsy	8.0%

Source: 2015 Downtown Jefferson Consumer Survey.

Opportunities Ahead?

Surveys were among a number of tools used to help identify and gauge the potential for possible business expansion and recruitment prospects in downtown Jefferson. The information is helpful in assessing business opportunities and in identifying possible gaps in the downtown business mix. Consumer survey responses could provide additional insight and help to gauge how the trade area might respond to various types of new and expanded businesses.

Suggestions revolving around Clothing and Clothing Accessories and Eating & Drinking Places were popular with consumer survey participants and could lend support for new and expanded clothing selections, restaurants and varied retail in downtown Jefferson.

Other business types and attractions frequently identified as candidates for expansion or recruitment in consumer survey responses included entries in the Sporting Goods, Hobby, Books & Music and Recreation/Entertainment categories.

Products frequently purchased online by consumer survey participants could also provide queues for the potential expansion of merchandise lines and complementary product lines for new and existing Downtown Jefferson businesses.

Table 5

Question

What type(s) of products have you purchased on the Internet within the last three months?

Products	Count	Percent
Women's Clothing	150	40.9%
Gifts	138	37.6%
Books	128	34.9%
Electronics	115	31.3%
Home Furnishings	85	23.2%
Hobbies, Crafts	81	22.1%
Sporting Goods	77	21.0%
Beauty Supplies	77	21.0%
Children's Clothing	76	20.7%
Specialty Foods	44	12.0%
Other	38	10.4%
Jewelry	34	9.3%
Flowers	22	7.9%

Source: 2015 Downtown Jefferson Consumer Surveys.

Table 6

Opportunities?

What types of new businesses or attractions would make you visit downtown more often.

Top Responses—Categorized	
Clothes , Clothing Accessories	28.9%
Food Service/Drinking Places	19.6%
Misc. Store Retail (flowers gifts etc.)	10.3%
Sporting Goods, Hobby, Books	13.4%
Recreation & Entertainment	7.8%
General Merchandise Store	7.1%
Office & Service (salons/spas)	4.3%
Electronics/Appliances	1.5%
Furniture & Home Furnishings	1.5%
Bldg. Material/Garden Equip	1.1%
Retail/General Uncategorized	1.1%

Source: 2015 Downtown Jefferson Consumer Surveys.

Table 7

Question

Do you transact sales on your website or through another website (i.e. eBay, Etsy, etc.)?

Business Survey Responses	Percent
Yes	7.3%
No	92.7%

Source: 2015 Downtown Jefferson Business Survey.

Leveraging Assets

Consumer survey participants gave Downtown Jefferson high marks for a variety of identifiable—and marketable—qualities and traits which provide a solid foundation for images and messages to be reinforced as part of a downtown branding strategy and system.

Table 8

Question

How does Downtown Jefferson compare to other places you frequently shop and do business in terms of:

Consumers Rating	A. Stronger	B. Equal	A + B
Customer service	30.0%	51.1%	81.1%
Cleanliness	22.0%	62.6%	84.6%
Quality of festivals	14.0%	30.2%	44.2%
Attractiveness	13.4%	50.8%	64.2%
Quality of dining	11.1%	50.5%	61.6%
Quality of products and services	8.9%	54.0%	62.9%
Variety of dining	8.6%	25.4%	34.0%
Variety and selection of shopping	1.9%	9.1%	11.0%

Source: 2015 Downtown Jefferson Consumer Surveys.

Downtown Jefferson marketing and branding strategies should emphasize images and messages which capitalize on "known" qualities of customer service and cleanliness of our community to deliver a powerful statement and resonating impressions. Leveraging assets already identified as strengths in the marketplace provides opportunities to make natural connections with consumers, and enhances the ability for the Downtown Jefferson brand to readily gain traction through repeated and consistent applications and extensions.

A Work in Progress

Consumer and business survey participants place a high priority on business expansion and recruitment efforts—including proposals for creating incentives for new and expanding businesses in the downtown area. The ranking of other possible efforts was highly consistent among the consumer and business survey groups, though consumers were more likely to place a high priority designation on possible enhancement efforts – including efforts to restore and preserve the downtown's historic character, to improve the streetscape, to develop housing in the downtown area, and to stage additional festivals and events.

The ranking of priorities provides direction for new and ongoing downtown enhancement initiatives. In some cases, a divergence in the opinions of consumers and businesses regarding possible enhancement efforts could suggest a need to share information and perspectives with businesses as a means of more closely aligning with, or responding to, the market.

Table 9

Question

Would you place a high, moderate or low priority on possible Downtown Jefferson enhancement efforts to:

Consumers (C) and Businesses (B) Rating as a "High Priority"

Enhancement Efforts	(C)	(B)
Create incentives for new and expanding downtown businesses	67.9% (1)	59.5% (1)
Restore and preserve the downtown's historic character	43.5% (2)	27.8% (2)
Improve and/or create more housing in the downtown area	30.6% (3)	22.5% (3)
Improve the downtown's streets, sidewalks, lighting, furnishings, green spaces, trails, etc.	30.5% (4)	15.6% (5)
Stage additional festival and special events in the downtown area	30.5% (4)	17.7% (4)

Source: 2015 Downtown Jefferson Consumer and Business Surveys.

First Things

Input regarding priorities for the downtown district generally aligns with suggestions offered by consumer and business survey respondents when asked, "What is the first thing you would do to improve Downtown Jefferson?" Economic restructuring initiatives, dominated by business recruitment, business enhancement and efforts to diversify the business mix, ranked highly, followed closely by design-oriented subjects and topics.

Table 10

Question

What is the first thing you would do to improve Downtown Jefferson?

Categorized Topics	Consumers	Businesses
Recruit Businesses; Diversity Mix	45.1%	35.8%
Buildings and Appearances	26.3%	20.9%
Streetscape and Public Spaces	5.7%	6.0%
Programs and Programming	4.7%	4.5%
Public Relations	3.4%	6.0%
General Maintenance	3.0%	6.0%
Festivals/Events	2.4%	7.5%
Business Operations & Practices	1.7%	3.0%
Cohesive Designs and Links	1.3%	6.0%
Housing	1.3%	0.0%

Source: 2015 Downtown Jefferson Consumer and Business Surveys. Most frequent categorized responses shown.

Consumer-related concerns and suggestions were cited more frequently than by business survey participants. With specific regard to the history and historic character of buildings found in the downtown area, the findings could suggest that environment, character and the feel of Downtown Jefferson are important.

Businesses offered suggestions in the recruitment of businesses with a diverse mix with high frequency. Improvements in buildings and building facades were also noted with higher frequency.

What is the first thing you would do to improve Downtown Jefferson?

Consumers and Businesses showed similarities in their desire of the recruitment of businesses, diversity in the mix, and the historic buildings and their appearance.

Most Loved

Consumers and businesses surveyed overwhelmingly identified features associated with the downtown's environment, character and feel as the things they love most or would never change, showing a great affection for the small town atmosphere and friendly nature of downtown. The findings can lend direction for marketing and branding strategies which connect with the downtown's tangible and intangible features most loved by both consumers and businesses, and help to distinguish Downtown Jefferson in the regional marketplace.

Table 11

Question

What is the one thing that you love most, or that you would never change, about Downtown Jefferson?

Categorized Responses	Consumers	Businesses
Special Features and Attractions	27.2%	14.8
History and Historic Characters/Bldgs.	23.9%	29.5
Environment; Character and Feel	21.0%	24.6
Business(es); Business Mix	12.7%	4.9
General Appearances, Décor and "Look"	6.5%	16.4

Source: 2015 Downtown Jefferson Consumer and Business Surveys. Most frequent categorized responses shown.

Consumers and businesses show a great affection for the Mahanay Bell Tower, the National Historic Greene County Courthouse, intact four-side square, and friendliness of the people. Consumers love the small town feel of the square and the green space around the courthouse.

Features identified as most loved can lend direction for marketing and branding strategies which connect with the downtown's tangible and intangible features, and help to distinguish Downtown Jefferson in the regional marketplace.

Business Tenure and Climate

Fifty-four percent of Jefferson area business survey participants indicated their business has been located in Jefferson for more than twenty years. The figure could be viewed as an indicator of stability in the business mix, and it may also suggest the need for a certain level of succession planning given that 44 businesses indicated they have been located in Jefferson for 21 or more years.

The downtown business climate also appears to be conducive to business start-up and entrepreneurial activity, as evidenced by 26% of the business survey sample indicating they have been located in Jefferson for ten years or less.

Customer Base

More than 88% of businesses surveyed identified Local/Regional residents as their primary customer base. The findings are consistent with the overall consumer survey sample showing that 93% of all respondents live within ten miles of Downtown Jefferson. The findings are also consistent with a market that tends to be loyal to local brands and businesses, and that values customer service, reputation and price of goods and services.

Table 12

Question

Which of the following best describes your primary customer base?

Responses	
Local/Regional Residents	88.0%
Downtown Area Employees	0.0%
Visitors and Tourists	3.6%
Other	8.4%

Source: 2015 Downtown Jefferson Business Survey.

Connections

A majority of Jefferson businesses appear to recognize the value and importance of the Internet and social media trends. More than 63% of business survey participants have an Internet website and six businesses (7%) indicated they engage in sales over the Internet. Fifty percent of businesses indicated their business has a Facebook page.

Given the relatively high Internet presence of downtown businesses, and high levels of interest in marketing topics and potential programs, Internet and social media applications could be an obvious—and important—component of Downtown Jefferson collaborative marketing programs and campaigns.

Table 13

Question

How long has your business been located in Downtown Jefferson?

Responses	
Less than 1 year	2.5%
1 to 4 years	10.0%
5 to 9 years	13.8%
10 to 20 years	20.0%
21+ years	53.8%

Source: 2015 Downtown Jefferson Business Survey.

Table 14

Question

Which of the following best describes the main reason for customers to do business with you?

Responses	
Reputation	34.9%
Customer Service	25.3%
Price of goods and services	12.1%
Other	12.0%
Selection & Variety	10.8%
Convenience	4.3%

Source: 2015 Downtown Jefferson Business Survey.

Table 15

Question

Would you consider participating in a collaborative marketing campaign for Downtown Jefferson?

Responses	
Yes	20.5%
Maybe	56.4%
No	23.1%

Source: 2015 Downtown Jefferson Business Survey.

Changes Ahead?

More than 25% of business survey respondents indicated the likelihood for their business to expand within the next one or two years as being moderate, high or very high. Other business survey results provide insight on the nature of potential changes that could occur within the downtown area and the business mix based on affirmative responses to a list of possible modifications.

Table 16

Question

In the next year or two, do you plan to change or modify your business in any of the following ways?

Responses	
Increase marketing	40.6%
Start and/or complete building improvements	32.8%
Expand services and product line	26.6%
Increase number of employees	26.6%
Expand hours of operation	15.6%

Source: 2015 Downtown Jefferson Business Survey. Most frequent responses shown.

The nature of changes being considered by downtown businesses, along with interest expressed in possible business assistance and training programs, suggests that the timing could be opportune for Jefferson Main Street to introduce or escalate efforts to:

- Facilitate collaborative marketing programs, possibly including a social media-based "meet your neighbor" campaign that focuses on the downtown's personalities and/or a cooperative advertising program designed to extend and reinforce the Downtown Jefferson brand.
- Share market study data and findings regarding product lines showing potential for expansion.
- Explore interest in, and identify resources for, marketing and clientele development for small businesses, business succession planning, and employee management topics.
- Work with the Main Street Design Committee, the Main Street Iowa Design Specialists, City of Jefferson and other partners to:
    - Promote Main Street Iowa design assistance and technical training services.
    - Develop, review or fine tune design guidelines.
    - Explore and pursue opportunities for financial and technical assistance to promote high quality building and business improvements, and to catalyze business expansion opportunities.

Table 17

Question

Of the following business seminar topics, which two would be of most interest and/or most useful to you?

Responses	
Social Media for Small Businesses	50.0%
Marketing for Small Businesses	41.2%
Finding and Keeping Customers	20.6%
Finding and Keeping Employees	16.2%
Business Succession Planning	16.2%
Ecommerce for Small Businesses	10.3%
Employee Benefits	5.9%
Other	5.9%

Source: 2015 Downtown Jefferson Business Survey.

Table 18

Question

Would you be inclined to use any of the following Building Assistance programs and incentives?

Responses	
Free/low-cost building improvement design services	45.8%
Low-interest building improvement loans	43.8%
Assistance to sell your building and/or business	20.8%

Source: 2015 Downtown Jefferson Business Survey.

Benchmarks

Certain data collected and compiled as part of the business survey provides valuable insights on Downtown Jefferson today and can be used to benchmark, track and measure changes and progress stemming from Jefferson downtown enhancement and economic development initiatives. The information can also be valuable to prospective businesses, investors, developers and entrepreneurs as they consider opportunities in Downtown Jefferson.

Downtown Sales and Revenues Trends

Survey results show more than fifty percent of downtown business survey respondents reported an increase in gross sales or revenues in 2014 as compared to 2013, and 28% reported gross sales or revenues stayed about the same.

Table 19

Question

Which of the following describes the change in your business' gross sales or revenues in 2014 as compared to 2013? (If unsure, use your best estimate)

Responses	
Increased by 1% to 5%	26.1%
Increased by 6% to 10%	27.5%
Increased by 11% to 15%	4.3%
Increased by 16% to 20%	1.4%
Increased by more than 20%	4.3%
Decreased by 1% to 5%	1.4%
Decreased by 6% to 10%	4.3%
Decreased by 11% to 15%	0.0%
Decreased by 16% to 20%	0.0%
Decreased by more than 20%	2.9%
Stayed about the same	27.5%

Source: 2015 Downtown Jefferson Business Survey.

Business survey participants expect the positive trends in sales and revenues reported by business survey participants for 2013 to 2014 to continue in 2015. All told, 64% of business survey respondents indicated they expect gross sales or revenues to increase in 2015 as compared to 2014, with most (54%) anticipating increases within a range of 1% to 10%. Only 8.6% of business survey respondents expect gross sales or revenues to decline in 2015, while 27.5% anticipate sales or revenue figures will stay about the same.

Table 20

Question

Do you rent or own your business location?

Responses	
Rent	31.7%
Own	68.3%

Source: 2015 Downtown Jefferson Business Survey.

OPPORTUNITIES

With the presence of Wild Rose Jefferson Casino and Resort and Cobblestone Hotel and Suites on U.S. Highway 30, Jefferson will have an increase of visitors. Visitors will come for a weekend get-away, musical events, corporate meetings, and social and family gatherings.

Jefferson is the northern trailhead for the Raccoon Valley Recreation Trail. In recent years, there has been a continuing increase of bicyclists pedaling into town from the Des Moines area for day trips or weekends. Jefferson is a bike-friendly destination.

The historic Lincoln Highway runs through the middle of town. The famed route is used by touring antique car clubs and by Baby Boomers exploring the treasures of small Iowa towns. They are welcome in Jefferson.

Opportunities abound to create a place where visitors will have a pleasant stay and will return. Jefferson has become a destination and has potential for tourism growth.

Ongoing restoration and preservation of the historic nature of the buildings in the Greene County Courthouse district is essential. Continued collaboration between Jefferson Matters: Main Street, city and county government and the building owners is needed. By finding incentives for building owners to restore the original architecture of the storefronts, Jefferson will retain its historic charm.

Additional ongoing improvements needed include way-finding signage in the downtown district, comprehensive branding, alley rehabs, green space plantings, and creative place-making of rest areas.

Jefferson has a vibrant artistic and creative community which boasts live theater, arts and dance studios, quilting and painting workshops, art and antiques stores, tea room, and coffee houses.

Jefferson Matters: Main Street's Tower View Team has helped create the first rooftop art in the downtown area. The installation can be viewed from the top of the Mahanay Bell Tower. Several agricultural-inspired murals can be found on the external building walls in the district. The downtown hosts a number of public art sculptures.

By expanding on these unique elements, indigenous to Jefferson, a space will be created that visitors will feel inspired to explore and create a memory.

Jefferson Public Library, Jefferson, IA/USA, 1973 David Williamson, Sculptor & Poet

Table 21 **Opportunities?** **Please list one or two specific types of businesses or attractions that might make you visit Downtown Jefferson more often.**	
Top Responses—Categorized	
Clothing and Clothing accessories	28.9%
Restaurants - All	19.6%
Sporting Goods	13.4%
Misc. Store Retail (gifts/used/pets/art galleries)	10.3%
Recreation & Entertainment	7.8%
General Merchandise Store (Dime and Dollar stores)	7.1%
Offices/Services	4.3%
Electronic & Appliance Store	1.5%
Source: 2015 Downtown Jefferson Consumer Surveys	

Opportunities

Retail

There is a great opportunity for expansion of the current retail offerings. Eighty-seven percent of consumer survey participants rated the variety and selection of goods in Jefferson weaker than those they find in other retail settings.

There is a consumer demand for more stores. Specific types of businesses noted on the survey:

- Clothing and clothing accessories (shoe store, younger women's clothing, men's clothing and children's clothing)
- Sporting goods (golf, tennis, workout equipment, sports apparel, bicycle parts and repair)
- Miscellaneous retail (gifts, pet supplies, repurposed clothing and goods, books, greeting cards, stationery)
- General merchandise (dime / dollar store)
- Higher-end antique stores

Businesses featuring unique local crafts, art and antiques would capture the interest of visitors coming from the bike trail, the casino/convention center and Lincoln Highway travelers, as well as local traffic to downtown.

Business survey participants indicated they would be interested in Building Assistance programs and Incentives. Since Jefferson is a Main Street Community, we have access to Main Street Iowa programs and resources, including design services and technical assistance for downtown property and business owners. Collaboration with local lending institutions, Jefferson Matters: Main Street, City of Jefferson and Greene County Development Corporation will also be important to moving forward.

Seminars on Social Media for Small Businesses and Marketing for Small Business were also of high interest. Jefferson Matters: Main Street Committees are finding resources to provide these programs to interested retailers. Web-based marketing opportunities need to be explored by the business community.

Food and Beverage Services

Twenty percent of consumer survey respondents identified restaurants and drinking (alcohol) establishments as businesses or attractions that might make them visit the downtown more frequently, making it the second ranked category. An increased variety and quality of dining establishments is desired by the market and could signal opportunities for existing restaurants and new entrepreneurs. A craft brewery, a wine bar and a business-class restaurant would be welcome.

Food and drink is the primary destination for travelers arriving on the bike trail and the Lincoln Highway. More dining experiences with a local flavor would be a great opportunity to keep visitors returning to downtown Jefferson.

Offices and Services

All county offices are located in the Courthouse and the City offices are a block north of the square. Within the district are five law firms, three banks, a funeral home and several accounting firms, tax and investment firms and real estate and investment businesses. Personal services include two hair salons, a barber shop, two chiropractic and two optometric offices. Four service organizations also have offices in the district. Respondents to the business survey included retailers, 18.1 percent; professional services, 19.3 percent; and personal services providers, 18.1 percent.

Seventy-three percent of consumer survey participants indicated they visited the downtown at least twice a week, demonstrating the important role these uses play in generating consistent traffic to the downtown area.

Table 22

Question

How often do you visit Downtown Jefferson for office and service-related purposes?

(Examples: library, city hall, salon/barbershop, dentist, doctor, chiropractor, attorney, accountant, dry cleaning, auto repair, etc.)

Top Responses—Categorized	
1 or 2 times a week	45.1%
Daily	28.0%
Once or twice a month	17.9%
Seldom or never	5.1%
A few times a year	4.0%

Source: 2015 Downtown Jefferson Consumer Survey.

OPPORTUNITIES

Housing

Consumer online survey responses provide a preliminary indication of interest in downtown housing and various housing options. Living in Downtown Jefferson appears to be particularly attractive to a younger demographic, with 36 percent of those survey participants expressing interest falling within the 24 years or younger age group.

Table 23
Potential Downtown Housing Market | Demographic Profile
For Consumer Survey participants indicating interest in downtown housing.

Age	Percent
24 or younger	36.3%
25 to 34	10.0%
35 to 44	18.8%
45 to 54	11.3%
55 to 64	12.5%
65 or older	11.3%

Household Size	Percent
1	3.7%
2	35.8%
3	14.8%
4	24.7%
5 or more	21.0%

Household Income	Percent
Less than $35,000	31.5%
$35,000 to $49,999	18.6%
$50,000 to $74,999	15.7%
$75,000 to $99,999	15.7%
$100,000 to $149,999	8.6%
$150,000 and greater	10.0%

Source: 2015 Downtown Jefferson Consumer Online Survey. Participants indicating "Yes" or "Maybe" when asked, "Would you consider living in Downtown Jefferson?"

More than two-thirds of those indicating they would consider living in the downtown with a “yes” or “maybe” response would prefer to own housing in Downtown Jefferson. Loft and Townhouse style housing options were most favored by survey participants expressing interest, followed by Condo and Apartment styles.

Table 24
Q: Would you consider living in Downtown Jefferson?

Responses	
Yes	11.2%
Maybe	20.1%
No	57.1%
I live downtown	11.6%

Table 25
Q: Would you prefer to own or rent housing in Downtown Jefferson?

Responses	
Own	67.9%
Rent	32.1%

Table 26
Q: What kind of housing in Downtown Jefferson would you look for or consider?

Responses	
Loft	44.2%
Townhouse	44.2%
Condo	27.3%
Apartment	27.3%
Senior Housing	14.3%

Source: 2015 Downtown Jefferson Consumer Online Survey.

FIRST STEPS IMPLEMENTATION STRATEGY

The Downtown Jefferson Market Study provides a snapshot of the downtown area today and explores opportunities for the future. The time frame for planning and implementing projects based on findings and opportunities identified as part of this study could extend up to ten years – or even more.

Because commercial business district redevelopment occurs within a dynamic environment, no set of specific implementation steps can remain valid for such a long time. Even in the short term, changing economic, social, political and cultural conditions may dictate a different sequence of events. Some projects might be implemented earlier if the right set of opportunities present themselves, or the community may determine that a project should be tabled as new opportunities emerge and others take priority. Because of these limitations, an implementation strategy can only be a general guide for implementing key aspects of the study.

The First Steps Implementation Strategy summarizes and prioritizes projects and activities that, undertaken as part of a comprehensive and incremental approach, will advance long-term goals for downtown Jefferson. Key market study findings and implications are summarized and potential Action Steps are organized in the areas of Business Improvement, Promotion, Design and Organization – a format consistent with the Jefferson's Main Street organization structure and its 4-point approach. By the very nature of the market study, implementation strategy actions are primarily focused in the areas of economic restructuring and promotion.

The list of potential projects and actions contained in this summary report is neither exhaustive nor exclusive. The projects and actions proposed for implementation area considered a "starting point" for the development of a more comprehensive strategy that is the product of market analysis findings, local knowledge, and the ongoing work of Jefferson Matters: Main Street staff and volunteers, partners, local business persons, community leaders and residents working together.

Priority Action Steps – Organization

Action	Description	Priority Level
1	Continue to encourage participation in downtown Jefferson planning processes and use information and direction gained from the market study to refine policies, strategies and concepts, and to fine tune and prioritize organization operations and advocacy efforts.	0
2	Work with Jefferson Matters: Main Street committees to disseminate the findings – and proposed projects – related to this study, to identify project funding needs, and to pursue funding sources and implement projects adopted as a result of this study.	0
3	Work with committees to review volunteer requirements, identify potential sources for volunteers, and assist the committees in the recruitment and training of volunteers necessary to implement projects adopted as a result of this study.	0
4	Work to involve residents, business persons, elected officials, community leaders and other community organizations in all phases of downtown planning, implementation and management.	0
5	Maintain an aggressive, ongoing public relations program to publicize plans, projects and results stemming from the market study, the strategy plan, and the annual work plan.	0

Priority Level Key:

0 = Immediate and/or Ongoing 1 = Within 1 Year 2 = Within 2 Years 3 = Within 3 Years

First Steps Implementation Strategy

Priority Action Steps – Business Improvement

Action	Description	Priority Level
1	Distribute the full market analysis and/or four-page summary version of the market study to existing downtown business and property owners, and to potential business prospects and investors.	0
2	Update and maintain a downtown property and business inventory; maintain a current list of available properties and businesses and distribute the list to area realtors and brokers as changes occur.	0
3	Using information compiled as part of this market study, collect, maintain and track information on downtown real estate, market conditions and trends; and repeat the business survey on an annual or bi-annual basis and track economic trends in the Main Street district.	0
4	Work in partnership with the City and other community & economic development organizations on an ongoing basis to assess land use plans and to promote and pursue appropriate redevelopment opportunities; consider opportunities for, and the appropriateness of, higher-density mixed-use development and other housing styles as a means of growing the area's residential market and population.	0
5	Devise and update a business clustering strategy which is compatible with resulting land use plans and strategies, which serves to build on existing and evolving niches, and which provides guidance for the preferred placement of business types and uses targeted for expansion and recruitment.	0
6	Augment market study data and information with traffic and/or pedestrian counts, collected at various locations and times throughout the year, to benchmark and track activity in the downtown; and re-administer the consumer intercept survey, possibly using a condensed version of the questionnaire and conducted semi-annually and/or during select events, to track downtown tourism trends and perspectives of various downtown audiences.	0
7	Devise fact sheets or similar written materials that can be readily updated to describe and promote available business programs and incentives, such as façade design assistance, façade improvement loans and grants, management consultations, and property and client referrals.	1
8	Organize and maintain a programmed Business Visitation Program as part of an ongoing business assistance program that engages downtown businesses, promotes available resources, facilitates the delivery of business assistance resources, and helps to identify business expansion candidates.	1
9	Continue to develop business promotional materials and to enhance the website as a tool for passive and active recruitment of targeted business prospects.	1
10	Identify and assist businesses that may be candidates for expansion based on product lines identified in the market study and interest discovered through the Business Visitation Program.	1
11	Identify and actively recruit specific business types and prospects based on business types identified in the market study and the availability of appropriate spaces.	2
12	Conduct field trips to communities and commercial businesses districts displaying similar characteristics and market demographics to examine the business mix and make contact with potential business expansion candidates.	2
13	Facilitate cooperative advertising and marketing efforts that involve property owners and agents to market available space and potential infill and redevelopment opportunities.	3
14	Identify and assist businesses in succession planning by using resources and facilitating access to assistance available through Main Street Iowa and other local, regional and state resources.	3

Priority Level Key:

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FIRST STEPS IMPLEMENTATION STRATEGY

Priority Action Steps – Promotion

Action	Description	Priority Level
1	Study promotion and marketing-related information and findings resulting from the market study and assess events and marketing activities for consistency and effectiveness. Incorporate "buzz words" in marketing headlines and messages and use images that capitalize on those features most liked and identifiable with the downtown district.	0
2	Continue to work closely with local, regional and state tourism organizations to promote the downtown as a visitor attraction; and track tourism-related activity and trends.	0
3	Review the existing events calendar. Work and support efforts to enhance and maintain existing downtown festivals and events and to introduce new events and activities – or new event components – which are consistent with downtown marketing strategies.	0
4	Continue to "freshen" and maintain feature content for the website and to share links and content with other community and visitor-oriented websites and social media applications.	0
5	Build on the downtown's National Historic District designation, through business community cooperative advertising, cross-marketing, and internet marketing efforts, in an ongoing effort to enhance awareness of the downtown district as a destination for culture and entertainment.	0
6	Create/update and distribute print and online general and targeted business guides (i.e., Shopping & Dining Guide, Entertainment & Sights, etc.), to capitalize on existing and evolving business clusters and to enhance awareness of available products and services.	1
7	Support, promote and facilitate downtown district cooperative advertising, cross-marketing, and Internet and social media marketing efforts.	1

Priority Action Steps – Design

Action	Description	Priority Level
1	Work with the City to ensure adequate and proper maintenance of the downtown's streetscape, furnishings and public spaces; use input and direction from survey results to address potential maintenance needs and problem properties.	0
2	Continue efforts to incorporate pedestrian-oriented and intermodal transportation features in the design and implementation of future downtown area improvements.	0
3	Address parking issues in an attempt to best meet the needs of the downtown's many users (customers, residents, visitors, employees, etc.); focus first on the management of the existing parking supply (i.e., time limits, signage, shared parking opportunities, etc.).	0
4	Maintain ongoing historic preservation education efforts designed to enhance the community's awareness of, and appreciation for, the preservation of downtown historic architecture and resources. Share results of surveys as a step toward aligning viewpoints and values related to the historic and cultural features of the downtown area.	0
5	Assemble, package and promote available incentives and downtown building improvement assistance programs. Continue to promote assistance available from and through Main Street Iowa, especially design assistance available to owners contemplating changes and improvements to downtown buildings.	0

Priority Level Key:

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CONCLUSION

For Jefferson Matters: Main Street and the entire community of Jefferson, the completion of this market study is not an end but rather the beginning of a new phase in the community's downtown revitalization and enhancement initiative. Currently, the Main Street Mini-Grant program in downtown Jefferson is helping to fund façade painting and window replacement for downtown properties and businesses. The City of Jefferson is interested in taking this to the next level with pursuing a Community Development Block Grant for the downtown district.

This summary report serves to highlight only a small sample of the knowledge and direction that can be synthesized from analysis of data collected during the market analysis process. Similarly, the implementation strategy outlined in the document is only a starting point for a more comprehensive slate of projects that is likely to emerge as local leaders and stakeholders work together and continue to study the market.

As Jefferson Matters: Main Street moves forward, we will continue to involve partners, community leaders, business persons and residents in efforts to analyze and interpret the information collected through the market analysis process in order to develop a complete understanding of the findings and results – and the implications for downtown. The ensuing process will "dig deep" into the results and their meanings and incorporate local knowledge into the analysis and interpretation of the study's findings. Such a process will serve to aid in the development and implementation of strategies that are both market-driven and intrinsic to our community's goals and aspirations for downtown Jefferson.

Indeed, the detailed market analysis process orchestrated to date may be, in and of itself, one of the most important "results" to emerge. While the process has served to help identify present-day priorities, existing and looming challenges, and immediate and emerging opportunities, it cannot, and does not pretend to anticipate tomorrow's priorities, next year's unexpected challenges, or exciting and unanticipated opportunities still over the horizon.

Now, and in the future, Jefferson Matters: Main Street and the entire community will be able to use these results for the betterment of Jefferson. It will serve as a useful and flexible tool for business recruitment and retention, as well as remain a "living and breathing" document. It will be able to change along with the times and trends of the community, and remain very useful in aiding Jefferson Matters: Main Street's enhancement of the downtown area.