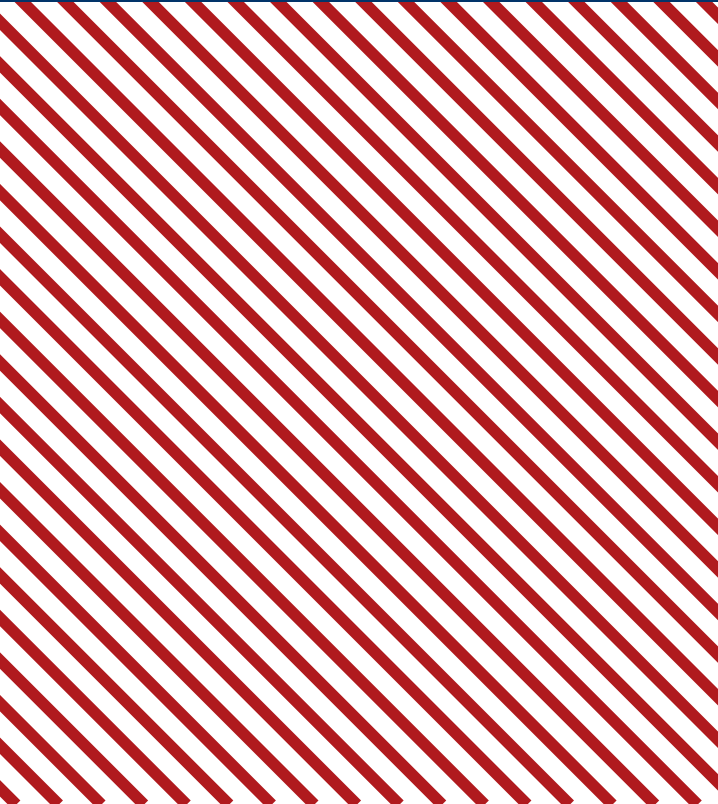




Ozark Distribution Market Study

October 25, 2021



Submitted to:
**City of Ozark, SMCOG
& Show Me Christian County**





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INTRODUCTION

This study is based on an industry cluster and occupational analysis for the City of Ozark, Missouri to inform feasibility of attracting and growing business operations in distribution sectors. The industry clusters were analyzed to determine which sectors have the highest potential for growth in the City of Ozark, Christian County, and a surrounding 50-mile region.

Stakeholder interviews, previous economic studies, and local plans were consulted to supplement the analysis of industry sector trends. Data sets from Emsi Economic Modeling Specialists, the Bureau of Labor Statistics, and the Bureau of Economic Analysis were reviewed as well to gain a comprehensive view of the city, county, and region. Ultimately, the analysis highlights distribution industry clusters that may be best targeted for growth through attraction and retention strategies. While this report identifies economic strengths that could promote success of specific industry sectors, it also recognizes local needs that must be accounted for to promote new development

EXISTING CONDITIONS

Background on Ozark

Ozark, Missouri was named the County seat of Christian County in 1890. It is in the Ozark region which is known for its abundance of natural resources that include sparkling springs, lakes, and caves. As of 2020 the city's population has increased 9.1% since 2015. This was an increase of more than 2,873 people. The population is expected to increase by another 7.9% between 2020 and 2025. The average earnings per job in Ozark is \$42.4K. This is \$31.7K below the national average earnings of \$74.2K per job.

Christian County is in the southwestern part of Missouri. The County is located within the Springfield MSA. With the growth of the Springfield MSA, Christian County became one of the faster growing counties in Missouri. From April 2010 to July 2019, the population of the county grew by 14.4%. It is expected to see an additional population increase of 7.4% between 2020 and 2025. Job growth for the county has also been steady. Over the last 5 years total, regional employment grew by 838. It is expected to grow by 2,021 jobs over the next 5 years.

The surrounding 50-mile radius includes all or a portion of 14 counties in Missouri and Arkansas (Greene, Barry, Douglas, Christian, Dade, Dallas, Lawrence, Ozark, Polk, Stone, Taney, Webster, Wright and Boone County, AR). The 50-mile radius includes a population 723,727 (2020)

that showed population growth of 23,235 over the last 5 years. Total regional employment is at 315,050 and is expected to grow by 15,788 jobs over the next 5 years. Regional average earnings per job is \$51.8K, which is \$22.4K below the national average earnings of \$74.2K per job.

Among the assets of the city is Highway 65. This highway runs through the city and gives travelers immediate access to Springfield and Branson. With their proximity to Springfield, the City of Ozark is often referred to as a "bedroom" community. As a result of the growth coming down from Springfield, the northern portion of the city has seen growth, while the southern portion has been slow-moving. With the available land in the southern portion, strategic plans for expanding infrastructure may be the catalyst needed to attract industries. Developing additional interchanges along Highway 65 to gain access to developable land is another strategy that may also spur further development in the city.

With the continuous increase in population, the city has positive and negative impacts from rapid growth. The city will have to navigate the process of keeping their small-town charm while still handling issues like traffic and controlled residential development. Past investments in roadways, downtown streetscapes, and an emphasis on smart growth have allowed the city to still offer their citizens a high quality of life.

DOCUMENT REVIEW

A key component of the methodology to inform the market analysis, the project team conducted a document review by examining various historical planning documents of the Christian County Region, including the City of Ozark. The review and analysis of various plans helped inform the project team of previous and existing economic development related strategies, goals, objectives, and initiatives. This analysis was performed to ensure the project team did not replicate or duplicate existing economic development objectives. Thus, this analysis will position the project team to build upon existing strategies and earlier analysis and develop a contemporary study with appropriate strategies and action steps. These strategies and action steps will be designed to meet the needs of the City of Ozark today and in the future, specifically if they choose to focus efforts on building a competitive distribution industry cluster.

The following plans were reviewed:

- City of Ozark Strategic Plan, 2016
- Christian County Step Up, 2020
- Show Me Christian County, Feasibility Analysis and Finding Report, 2019
- Redevelopment Plan for the Finley River Redevelopment Area, Ozark Missouri, 2018
- Show Me Christian County, Action Plan for Economic Development, 2019
- Show Me Christian County, Strategic Plan, 2019
- Downtown Revitalization and Economic Assistance for Missouri, Residential Market Analysis, 2015
- Downtown Revitalization and Economic Assistance for Missouri, Retail Market Analysis, 2015
- Christian County Strategic Plan and Assessment, 2013

Key Findings from the Document Review include:

- Several plans articulated a desire to ensure Christian County communities, including Ozark, have the resources needed to support business expansion, formation, and attraction.
- Several plans outlined goals to foster a business and development-friendly regulatory environment and placed a premium on infrastructure improvements across the region.
- Several plans recognized accessibility as a strength, while others recognized that a lack of east-west connections and a tenuous source of funding dedicated to transportation improvements were potential obstacles or challenges in the region.
- Several plans recognized the importance of shovel-ready development sites; the need to better utilize creative public financing strategies; and the need to review, evaluate and potentially redesign development processes across the region.
- All plans recognized the importance of enhancing the quality of life in the region to attract and retain residents.

ONSITE

TPMA completed an on-site visit to Ozark and met with approximately 15 business and community leaders to better understand economic conditions in the city, region, and county. Interviews focused on understanding strengths, weaknesses, opportunities, and threats related to economic development in Ozark and potential to grow the city's base of development businesses. A windshield tour was also completed during the on-site. This allowed TPMA to better understand potential development sites, development patterns, recently completed projects, and relationships between regional communities. Key findings from the document review and on-site visit are included in the following SWOT section.

SWOT

Strengths

The quality of life that Ozark offers to residents and visitors is a significant community strength. This is primarily driven by the city's quality housing, public school system, high educational attainment of residents, unique charm, and proximity to Springfield and Branson. The city has also been proactive at making infrastructure and roadway improvements to meet the needs of residents and businesses. The city has logistical assets, such as Highway 65, which bisects the community. Currently, there are three exits along Highway 65 that have strong potential for development. Key strength themes are identified below:

- Quality of Life – Small town charm/proximity to Springfield and Branson
- Public Schools – Talent/Educated population
- Public investments in roads, trails, and placemaking
- Private investment in placemaking
- Highway 65 and 3 interchanges – Visibility
- Strong commercial retail development in south Ozark
- Committed community leadership
- Quality single family homes
- Commute into Ozark from Springfield is much shorter than the commute into Springfield from Ozark
- City owns its water utility

Weaknesses

Weaknesses identified through this study related to challenges caused by regional growth, lack of shovel-ready sites, and lack of quality hotels. The city has experienced tremendous growth and development of single-family homes. This challenges the city's ability to collect tax revenue as the property taxes derived from these homes go completely to the school system. For this reason, there is a need to emphasize development of businesses that pay sales tax to ensure the city can collect revenue to appropriately provide services. Another weakness noted was red tape that some developers have gone through when working with the city. There are likely opportunities to streamline the entitlement process for city government as this was one of the biggest challenges note by developers. In some instances, developers had trouble navigating various meetings with sperate entities including special road districts. Developers also noted miscommunication about what the city would pay for and what developers are expected to pay for in terms of utilities and infrastructure improvements. The cost of these connections and responsibility of developers to pay these fees has ended some deals. Challenges with revenue collection also make it difficult for the city to proactively improve sites. This lack of shovel-ready properties could make economic development efforts more challenging. Another weakness is that Ozark doesn't have enough hotels to support local tourism. Key weakness related themes are identified below:

- Developers have challenges with entitlement process and negotiating infrastructure incentives
- Ability to collect taxes/lack of community understanding
- Lack of suitable hotels
- Over-reliance on rooftops
- City described as reactive rather than proactive
- Electrical utility is privately owned and charges high rates
- Lack of shovel-ready sites
- Greenspace exists but difficult to get site control/topography

Opportunities

Ozark has a variety of opportunities to drive economic development and quality of place development. Stakeholders noted that in addition to distribution industries, the city could attract amateur sports facilities and related businesses. New unique assets such as Finley Farms and the Ozark Mill have also been developed in the city and will draw more visitors to the region while enhancing quality of place. Continuing to support and grow developments that promote and grow the local tourism economy is an opportunity. Highway 65 is an opportunity for the city to leverage for new economic development too. Key opportunity themes are listed below:

- Tourism/Entertainment
- Amateur Sports
- Regional in-migration from other parts of US
- Traffic on Highway 65 between Springfield/Branson
- Morris Family engagement
- Development near Highlandville interchange based on future growth

Threats

Threats identified were tied to the potential expiration of the transportation sales tax and reliance on sales tax in general. A lack of outside corporate investment may be another threat to regional success and there is a need to show investment from outside the region. This will help demonstrate that Ozark is a strong community to do business for local, regional, and national brands. Regional competition for distribution business attraction is another threat to the region. Republic has the most momentum when it comes to distribution development as it recently completed a deal with Amazon and attracted Convey of Hope. Republic also has geographic advantages including its location near major highways and availability of shovel ready sites. The following key themes related to threats are identified below:

- Potential expiration of transportation sales tax
- Competition from other regional communities
- Distribution concentrated in Republic
- Cooperation between schools and local government
- Reliance on sales tax collection
- Increased housing prices/lack of housing diversity
- Unchecked growth

INDUSTRY SECTOR ANALYSIS

Introduction

An industry sector analysis highlights some of the industries identified as having potential within the region. Factors like growth, jobs, wages, and concentration have been used to measure the potential for industries of focus. The following industry sector analysis has been conducted for three geographic scopes. The first analysis focuses on the Ozark ZIP code, 65721; this narrow focus provides a close look at trends or opportunities unique to the City of Ozark. The second analysis includes the entirety of Christian County and adds data for industries which might fall outside of the 65721 ZIP code. The final analysis has been conducted for a region defined by a 50-mile radius from Ozark. This scope provides a more regional assessment of industry trends and includes larger cities, like Springfield. Each analysis provides a distinctive look at industry potential in and around Ozark, and highlights opportunities to be capitalized upon in the area.

Within each geographic scope, two levels of analyses were performed, one of which focused exclusively on distribution industries, and another which included all industries, distribution-related or not. After an analysis was performed to include data for all industries, criteria restrictions were implemented to isolate distribution industries. For this second analysis, only a limited number of industries, as classified by 6-digit North American Industry Classification System codes, or NAICS codes, were included. All NAICS codes starting with 48 and 49 were included, which classify industries that relate to transportation or warehousing. In addition, industries in the Harvard Distribution and E-Commerce Group were included, which comprise construction, professional, and machinery equipment wholesaling industries, among others.

To evaluate industry potential, we measured the relative concentration and competitiveness for each industry. Location quotient measures the concentration of any given industry within the defined region as it relates to other, similar regions throughout the country. For example, if an industry in Christian County's location quotient is '5', that means that the industry is five times as concentrated in Christian County as it is in other counties throughout the United States.

Competitive effect specifies how much of the job change for a given industry within the region is the result of some unique competitive advantage. To calculate the competitive effect, actual job growth in the last five years (2016-2020) is compared to expected job growth within the same period. Expected job growth is estimated using industry mix effect, which is the number of jobs expected to be added (or lost) within the industry in the defined region, as well as the national growth effect, which is the number of jobs an industry is expected to gain or lose according to national industry trends. The competitive effect, then, is the net difference between the expected job change and the actual job change.

Ozark ZIP Code (65721)

HIGHLY CONCENTRATED INDUSTRIES (ALL INDUSTRIES)

The Small Arms Ammunition Manufacturing industry is the most highly concentrated industry within the 65721 ZIP code; the concentration of this industry is nearly 143 times what you would expect its concentration to be in other, similar regions throughout the country. The second most highly concentrated industry in the region is the Travel Trailer and Camping Manufacturing industry; Tracker Marine is located within the city and is likely responsible for the industry's high ranking by this concentration metric. Despite the fact that this industry has a lower location quotient than the Small Arms Ammunition Manufacturing industry, it actually employs more workers; the first and second most highly concentrated industries employed 90 and 172 workers in 2020, respectively. Many of the following industries that have a high location quotient do not employ a significant number of workers; these numbers are low because of the restricted scope of the analysis, and their relatively high concentration at the ZIP code level is still an indication of economic potential.

NAICS	Industry	Location Quotient	2020 Jobs
332992	Small Arms Ammunition Manufacturing	142.99	90
336214	Travel Trailer and Camper Manufacturing	67.16	172
337125	Household Furniture (except Wood and Metal) Manufacturing	55.24	17
711190	Other Performing Arts Companies	37.90	15
488999	All Other Support Activities for Transportation	31.01	24
423140	Motor Vehicle Parts (Used) Merchant Wholesalers	29.49	39
332114	Custom Roll Forming	17.35	<10
315240	Women's, Girls', and Infants' Cut and Sew Apparel Manufacturing	16.40	17
321920	Wood Container and Pallet Manufacturing	15.49	59
425110	Business to Business Electronic Markets	15.43	28

Figure 2: Location Quotient and Jobs in Ozark

HIGHLY CONCENTRATED DISTRIBUTION INDUSTRIES

After organizing all industries within the 65721 ZIP code by location quotient, the parameters of the analysis were restricted to include only the distribution industries as defined in the introduction to this section. Two of these distribution-related industries appeared in the previous graph and are very highly concentrated within the focus area even when compared to all other industries. The most highly concentrated distribution industry is the All Other Support Activities for Transportation industry, which is 31 times more concentrated in the 65721 ZIP code than in other similar areas throughout the country. This industry could include businesses like natural gas plants, produce storage or cooling facilities, stockyards, or related businesses. Business to Business Electronic Markets is also a very highly concentrated industry which includes any business which facilitates online transactions between businesses. Many of the other most highly concentrated industries in this focus area are equipment wholesalers. While some of the industries don't employ many workers, they are still important for the study; few industries will provide a substantial number of jobs within such a restricted geographic scope. These industries' high concentration indicates an opportunity to provide a good or service that is not easily accessible elsewhere; therefore, industries with a high location quotient have a greater potential for attracting income from outside of the region.

Distribution Industry Concentration - 65721 ZIP Code

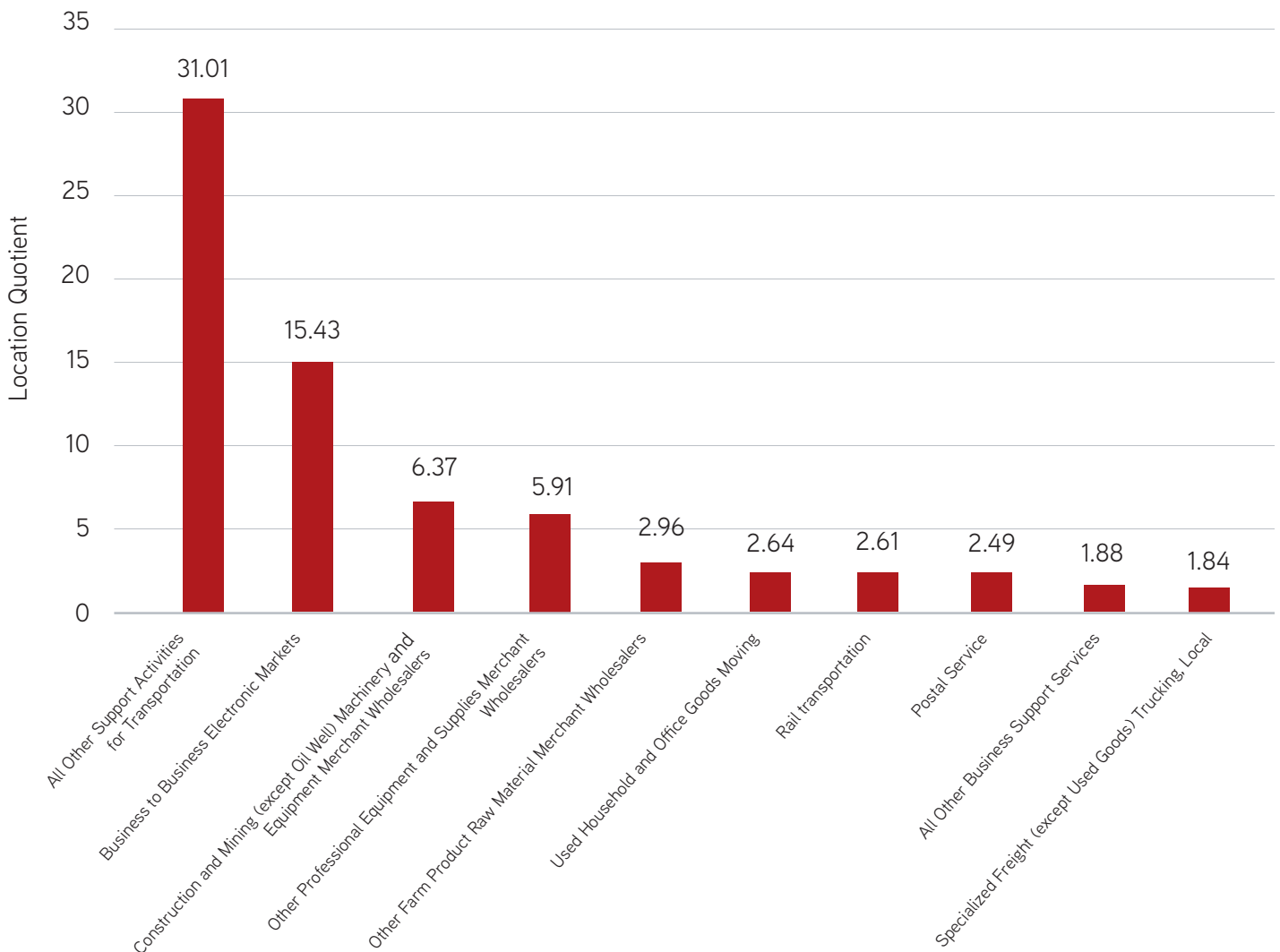


Figure 3: Distribution Industry Concentration in Ozark

NAICS	Industry	Location Quotient	2020 Jobs
488999	All Other Support Activities for Transportation	31.01	24
425110	Business to Business Electronic Markets	15.43	28
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	6.37	35
423490	Other Professional Equipment and Supplies Merchant Wholesalers	5.91	12
424590	Other Farm Product Raw Material Merchant Wholesalers	2.96	9
484210	Used Household and Office Goods Moving	2.64	15
482110	Rail transportation	2.61	33
491110	Postal Service	2.49	9
561499	All Other Business Support Services	1.88	9
484220	Specialized Freight (except Used Goods) Trucking, Local	1.84	25

Figure 4: Distribution Industry Location Quotient and Jobs in Ozark

MOST COMPETITIVE INDUSTRIES (ALL INDUSTRIES)

After ranking local industries by their relative concentration, the most competitive industries within the 65721 ZIP code focus area were identified. Within such a small geographic scope, the “Industry Mix Effect” and “National Growth Effect” estimates, both of which measure the expected job change for an industry within the region, are often small numbers, or even ‘0’. This could be due to the fact that the focus area is so small; at a such a local level, even growing industries won’t be predicted to generate massive increases in jobs. This might also be a characteristic of the industry itself; if the industry is small, the fluctuation in jobs provided will not be as pronounced as in other, larger industries.

The most competitive industry in the focus area is the Travel Trailer and Manufacturing industry, which was also identified as being highly concentrated within the area. This indicates that the industry is relatively unique to the region and is also growing; in the last five years, this industry saw an increase in 166 jobs. This makes the industry very competitive and one which is a significant driver of economic activity within the focus area. The second most competitive industry is Full-Service Restaurants, and the third is Limited-Service Restaurants. These industries were predicted to shrink in the last five years, but they grew within the focus area. This indicates that the City of Ozark is well-suited to support quality-of-place industries even if they are less competitive throughout the rest of the country.

NAICS	Industry	Industry Mix Effect	National Growth Effect	Expected Change	Competitive Effect	2020 Jobs
336214	Travel Trailer and Camper Manufacturing	0	(0)	0	166	172
722511	Full-Service Restaurants	(114)	(7)	(121)	156	535
722513	Limited-Service Restaurants	(5)	(6)	(11)	75	466
441110	New Car Dealers	(4)	(1)	(5)	59	133
813110	Religious Organizations	2	(7)	(5)	58	521
561621	Security Systems Services (except Locksmiths)	1	(0)	1	44	63
903611	Elementary and Secondary Schools (Local Government)	(16)	(13)	(29)	43	904
903612	Colleges, Universities, and Professional Schools (Local Government)	(0)	(0)	(0)	34	34
331110	Iron and Steel Mills and Ferroalloy Manufacturing	0	(0)	(0)	32	34
621610	Home Health Care Services	8	(1)	7	31	114

Figure 5: Most Competitive Industries in Ozark

MOST COMPETITIVE DISTRIBUTION INDUSTRIES

The final analysis conducted for the 65721 ZIP code was a competitive effect analysis for the distribution industries within the focus area. As was the case with the previous analysis conducted for all industries, many of the distribution industries that have been identified as competitive are the same industries that were previously noted to be highly concentrated within Ozark. Construction and Mining Machinery Equipment Merchant Wholesalers and Other Professional Equipment and Supplies Merchant Wholesalers are the two most competitive industries in the region; they added 29 and 11 jobs, respectively, to the focus area in the last five years.

NAICS	Industry	Industry Mix Effect	National Growth Effect	Expected Change	Competitive Effect	2020 Jobs
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	0	(0)	0	29	35
423490	Other Professional Equipment and Supplies Merchant Wholesalers	0	(0)	0	11	12
484220	Specialized Freight (except Used Goods) Trucking, Local	1	(0)	0	7	25
484121	General Freight Trucking, Long-Distance, Truckload	1	(0)	0	7	25
425120	Wholesale Trade Agents and Brokers	(3)	(0)	(3)	6	10
424210	Drugs and Druggists' Sundries Merchant Wholesalers	1	(0)	0	6	9
423420	Office Equipment Merchant Wholesalers	(0)	(0)	(0)	2	9
423830	Industrial Machinery and Equipment Merchant Wholesalers	0	(0)	0	2	9
423840	Industrial Supplies Merchant Wholesalers	0	(0)	0	1	9
561499	All Other Business Support Services	(1)	(0)	(1)	1	9

Figure 6: Most Competitive Distribution Industries in Ozark

AREA THEMES

There are many industries within the 65721 ZIP codes that are noteworthy and indicate potential for economic growth within the area. At the local level, equipment wholesaler industries are the most highly concentrated and competitive industries, with those related to construction, mining, and professional equipment being the most prominent. To a lesser degree, some transportation-related industries are rising to the top of both lists; Local Specialized Freight Trucking, for example, scores highly on both charts. A focus on these distribution industries could allow Ozark to capitalize on economic trends and opportunities that are unique to the focus area, which could result in an increase in local jobs and revenues.

Some quality-of-place industries stand out as well. Full- and limited-service restaurants are very competitive within the region but not highly concentrated; this indicates potential for growth and an opportunity for local development. Other industry specializations that are common and somewhat unique to the area, such as travel trailer, camper manufacturing, and ammunition manufacturing, can be supported as steady contributors to local economic activity.

At the next level of analysis, a broader view of the county-wide economic conditions will help inform decisions regarding the attraction or support of industries that are important for the entirety of Christian County.



Christian County

HIGHLY CONCENTRATED INDUSTRIES (ALL INDUSTRIES)

At the county level, the Small Arms Ammunition Manufacturing industry is still the most highly concentrated. However, its location quotient is much lower, and the same number of jobs are provided at the county level as were provided at the ZIP code level; none are located throughout the rest of Christian County. The next three most highly concentrated industries are manufacturing industries. Plastics Packaging Film and Sheet Manufacturing is 36 times as concentrated in Christian County than in other counties throughout the country. Travel Trailer and Camper Manufacturing and Household Furniture Manufacturing are 29 and 23 times as concentrated, respectively. The Plastics Packaging Film and Sheet and Travel Trailer and Camper Manufacturing industries employ the most workers of all the most concentrated industries in the county. Collectively, the two employ more than 180 workers. In addition to providing many local jobs, each of these is important for attracting business from outside of the county; all of these industries supply goods or services that are not as easily accessible in other counties, which makes their location in Christian County advantageous.

Industry Concentration - Christian County

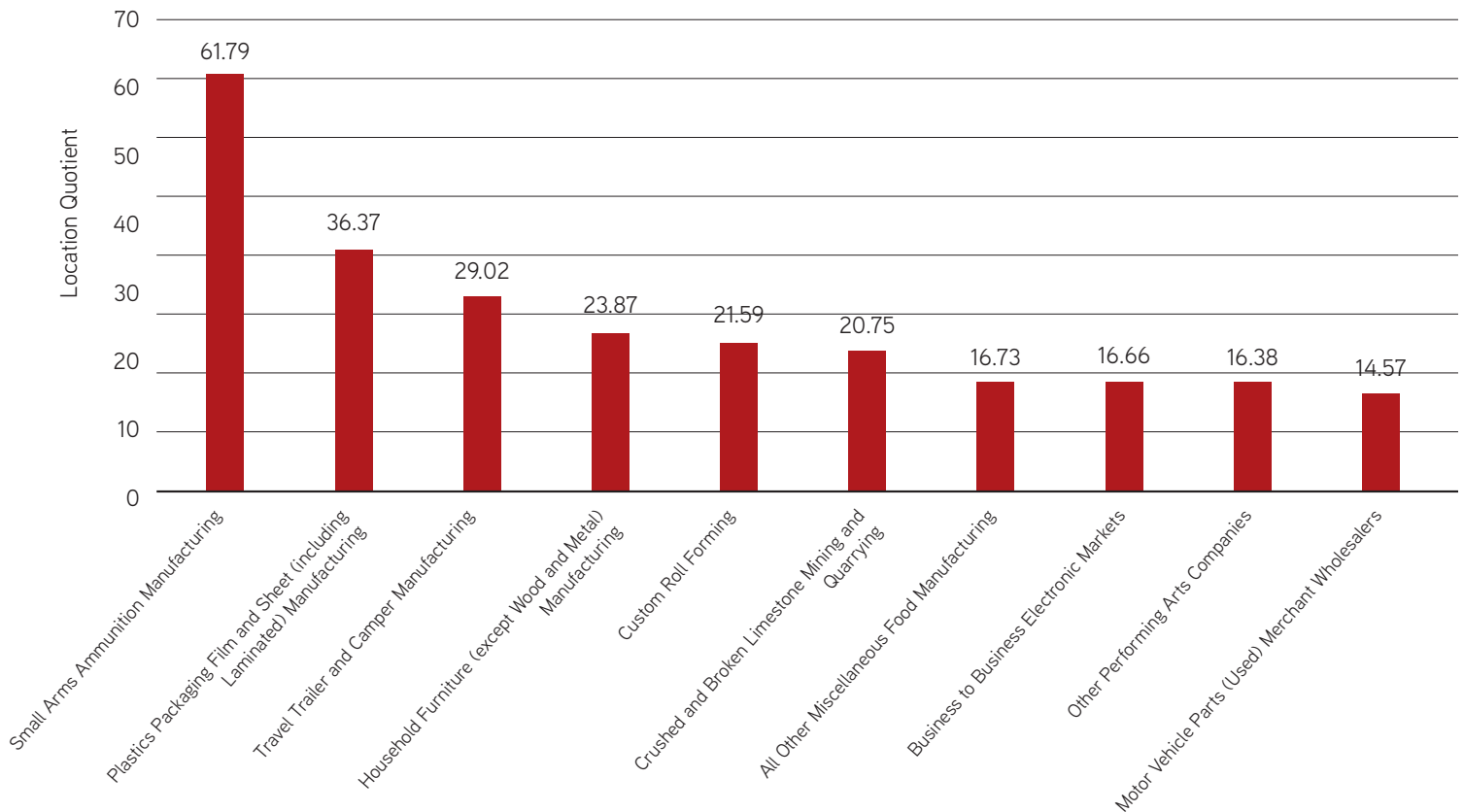


Figure 7: Industry Concentration in Christian County

NAICS	Industry	Location Quotient	2020 Jobs
332992	Small Arms Ammunition Manufacturing	61.79	90
326112	Plastics Packaging Film and Sheet (including Laminated) Manufacturing	36.37	109
336214	Travel Trailer and Camper Manufacturing	29.02	172
337125	Household Furniture (except Wood and Metal) Manufacturing	23.87	17
332114	Custom Roll Forming	21.59	19
212312	Crushed and Broken Limestone Mining and Quarrying	20.75	64
311999	All Other Miscellaneous Food Manufacturing	16.73	84
425110	Business to Business Electronic Markets	16.66	70
711190	Other Performing Arts Companies	16.38	15
423140	Motor Vehicle Parts (Used) Merchant Wholesalers	14.57	44

Figure 8: Location Quotient and Jobs in Christian County

HIGHLY CONCENTRATED DISTRIBUTION INDUSTRIES

After restricting the analysis to include only distribution industries, many familiar industries appear on the graph. The top two most highly concentrated industries – Business to Business Electronic Markets and All Other Support Activities for Transportation – were also at the top of the list for the ZIP code analysis. In looking at the number of jobs provided by each, it should be noted that the All Other Support Activities for Transportation industry saw no change at the county level, which means that all of the employers within the county are in the 65721 ZIP code. Business to Business Electronic Markets, though, provide many more jobs (70, in total) at the county level. Many of the same wholesaler industries still have the highest location quotients at the county level. There are also two transportation industries that are important in this selection, as they employ the most workers: Long Distance Specialized Freight Trucking and Rail Transportation employ 100 and 103 workers, respectively.

Distribution Industry Concentration - Christian County

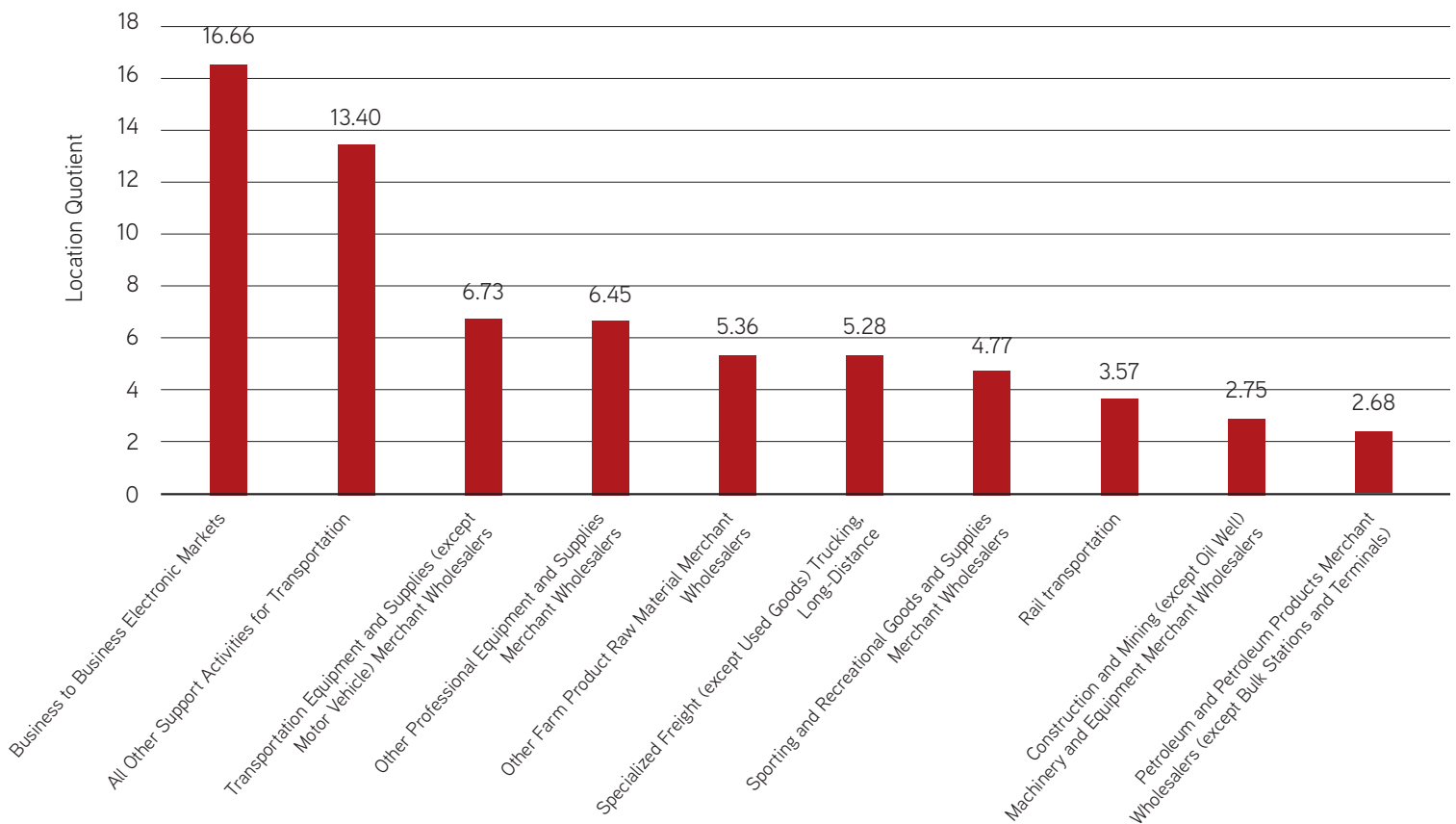


Figure 9: Distribution Industry Concentration in Christian County

NAICS	Industry	Location Quotient	2020 Jobs
425110	Business to Business Electronic Markets	16.66	70
488999	All Other Support Activities for Transportation	13.40	24
423860	Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers	6.73	31
423490	Other Professional Equipment and Supplies Merchant Wholesalers	6.45	29
424590	Other Farm Product Raw Material Merchant Wholesalers	5.36	9
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	5.28	100
423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers	4.77	37
482110	Rail transportation	3.57	103
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	2.75	35
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)	2.68	24

Figure 10: Distribution Industry Location Quotient and Jobs in Christian County

MOST COMPETITIVE INDUSTRIES (ALL INDUSTRIES)

The most competitive industries in the region resemble those which were most competitive at the ZIP code level. The Travel Trailer and Camper Manufacturing industry is still competitive but saw no additional growth at the county level than it saw within the 65721 ZIP code; all of the industry's growth is attributed to businesses within that ZIP code. The Full- and Limited-Service Restaurant industries still have some of the highest competitive effects at the county level. The Full-Service Restaurant Industry was expected to lose 211 jobs between 2016 and 2020; in reality, it added 61 jobs, which is 272 more than were expected to be added. Similarly, the Limited-Service Restaurant Industry was expected to lose 24 jobs. It added 135 jobs in the last 5 years, or 159 more than were expected to be added.

NAICS	Industry	Industry Mix Effect	National Growth Effect	Expected Change	Competitive Effect	2020 Jobs
722511	Full-Service Restaurants	(198)	(13)	(211)	272	930
336214	Travel Trailer and Camper Manufacturing	0	(0)	0	166	172
722513	Limited-Service Restaurants	(11)	(13)	(24)	159	992
903611	Elementary and Secondary Schools (Local Government)	(39)	(31)	(70)	101	2,145
238220	Plumbing, Heating, and Air-Conditioning Contractors	35	(5)	30	93	435
813110	Religious Organizations	3	(9)	(6)	81	722
903612	Colleges, Universities, and Professional Schools (Local Government)	(0)	(0)	(0)	80	80
561730	Landscaping Services	14	(4)	10	72	351
441110	New Car Dealers	(5)	(1)	(6)	69	158
238990	All Other Specialty Trade Contractors	9	(2)	7	57	227

Figure 11: Most Competitive Industries in Christian County

MOST COMPETITIVE DISTRIBUTION INDUSTRIES

At the county level, the most competitive distribution industries are a mix of trucking and wholesaler industries. A more substantial number of jobs is provided by these industries at the county level. Collectively, these top ten most competitive industries provide 355 jobs. While the expected change for many of the industries is still small, their growth over the last five years was not; Construction and Mining Machinery and Equipment Merchant Wholesalers industry, for example, didn't expect to see any growth, but added 29 jobs.

NAICS	Industry	Industry Mix Effect	National Growth Effect	Expected Change	Competitive Effect	2020 Jobs
484121	General Freight Trucking, Long-Distance, Truckload	3	(1)	2	34	131
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	0	(0)	0	29	35
423490	Other Professional Equipment and Supplies Merchant Wholesalers	0	(0)	0	29	29
424210	Drugs and Druggists' Sundries Merchant Wholesalers	2	(0)	2	27	41
425120	Wholesale Trade Agents and Brokers	(8)	(0)	(8)	15	25
424990	Other Miscellaneous Nondurable Goods Merchant Wholesalers	(0)	(0)	(0)	13	17
484220	Specialized Freight (except Used Goods) Trucking, Local	1	(0)	1	13	46
423840	Industrial Supplies Merchant Wholesalers	0	(0)	0	10	9
423420	Office Equipment Merchant Wholesalers	(0)	(0)	(0)	4	9
484122	General Freight Trucking, Long-Distance, Less Than Truckload	0	(0)	0	4	13

Figure 12: Most Competitive Distribution Industries in Christian County

AREA THEMES

Different industry trends start to emerge at the county level than those which were observed at the ZIP code level. Manufacturing industries are some of the most highly concentrated in the county, as are equipment wholesalers of the distribution industries. There is much variety in the types of products handled by the wholesaling industries; for example, construction equipment, professional equipment, and druggist's sundries wholesalers are all highly ranked. The variability in product indicates that the county is suitable for wholesalers generally, and not necessarily for any particular product or service industry.

The transportation industries highlighted in this analysis provide the most jobs; their growth becomes more pronounced the broader the focus area becomes, which indicates their importance for the regional economy. Many of the wholesaler and transportation industries that are highly concentrated are also very competitive, which means they saw significant job growth (compared to the projected growth) in the last five years. These growing, concentrated industries are opportunities to use advantages of the county to capitalize on larger-scale economic trends.

The Business-to-Business Electronic Markets industry is still an opportunity at the county level due to its high concentration within Christian County. Quality-of-place industries like full- and limited-service industries continue to grow and lead the county as some of the most competitive industries.



50-mile Radius

HIGHLY CONCENTRATED INDUSTRIES (ALL INDUSTRIES)

The third and final scope of analysis is the broadest; this focus area is defined as the region within a 50-mile radius from Ozark. At this level of analysis, regional trends and opportunities begin to emerge. Moreover, Springfield is added to the analysis, which brings with it a multitude of industries that weren't present in the more focused analyses.

The most highly concentrated industry within this focus area is the Electronic Connector Manufacturing industry, which employs more than 900 workers. Its substantial job supply and high relative concentration make it a promising industry in the region; the second most highly concentrated industry (Women's Handbag and Purse Manufacturing), however, only employs 39 workers. It is highly concentrated but not a significant contributor to job growth at this large of a geographic scale. Manufacturing industries are clearly the defining industries of the region; eight of the ten industries presented in the graph below are related to manufacturing. Together, they employ nearly 7,500 workers.

Industry Concentration - 50 mi. Radius

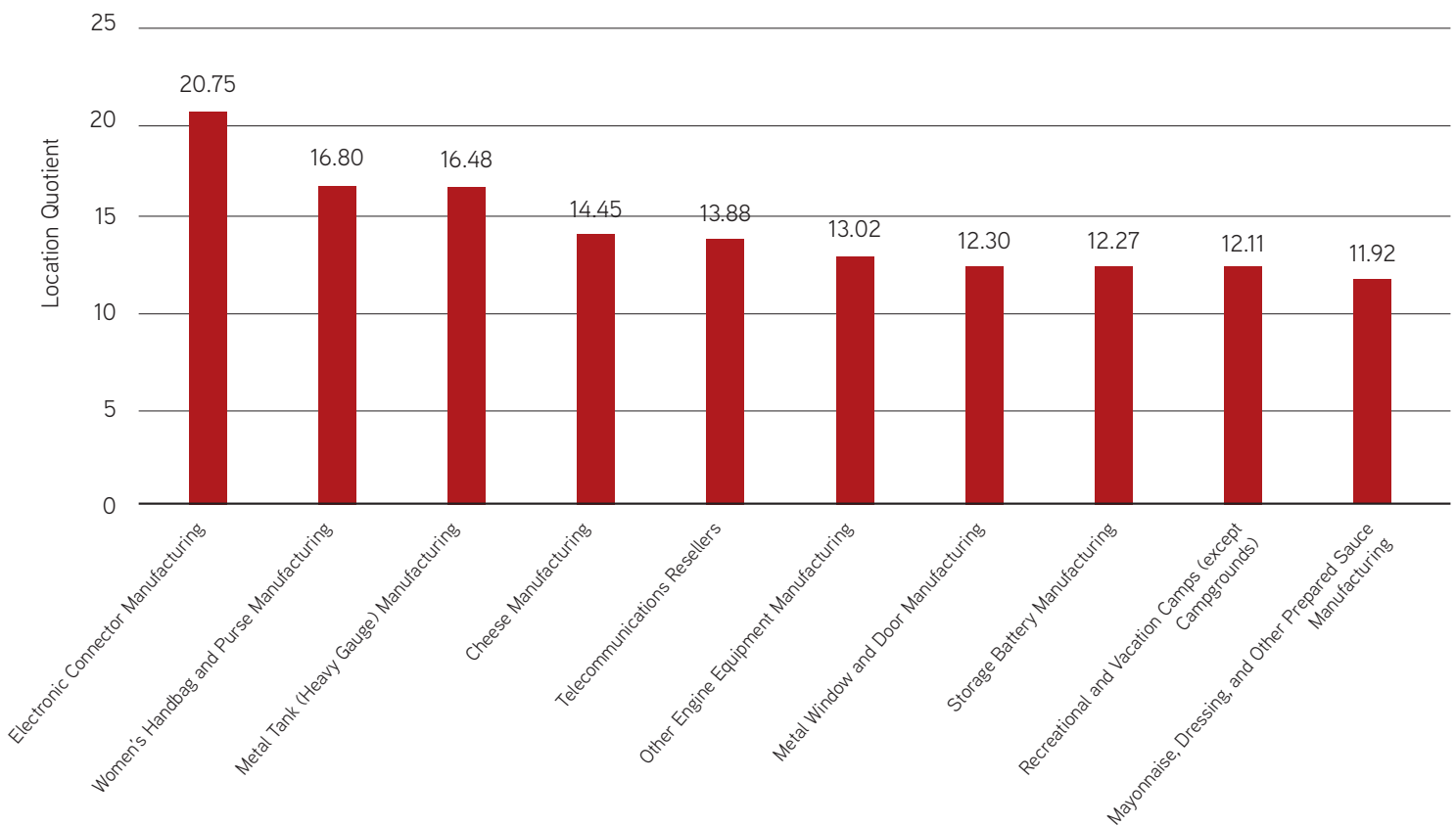


Figure 13: Industry Concentration in the 50 mi. Region

NAICS	Industry	Location Quotient	2020 Jobs
334417	Electronic Connector Manufacturing	20.75	903
316992	Women's Handbag and Purse Manufacturing	16.80	39
332420	Metal Tank (Heavy Gauge) Manufacturing	16.48	1,159
311513	Cheese Manufacturing	14.45	1,622
517911	Telecommunications Resellers	13.88	1,375
333618	Other Engine Equipment Manufacturing	13.02	1,141
332321	Metal Window and Door Manufacturing	12.30	1,564
335911	Storage Battery Manufacturing	12.27	645
721214	Recreational and Vacation Camps (except Campgrounds)	12.11	582
311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	11.92	448

Figure 14: Location Quotient and Jobs in the 50 mi. Region

HIGHLY CONCENTRATED DISTRIBUTION INDUSTRIES

Some of the distribution industries that are highly concentrated in this focus area have been present in the last two analyses, but some are new. The most highly concentrated industry – All Other Pipeline Transportation – is a bit of an anomaly; it is very highly concentrated but only employs 13 workers. Thus, it is not necessarily a significant driver of economic activity in the region.

A new trend starts to emerge at this level of analysis that was not present in the others; transportation industries, and more specifically trucking industries, appear to be more concentrated within the region (relative to other industries). The Long Distance, Truckload General Freight Trucking, Long Distance Specialized Freight Trucking, and Long Distance Less-Than-Truckload General Freight Trucking industries are all at least twice as concentrated within the region than in other, similar regions. Moreover, they employ many workers; collectively, the three trucking industries provide more than 8,800 jobs.

One industry has appeared as a highly concentrated industry at every level of analysis: Business to Business Electronic Markets. At the regional level, this industry employs nearly 200 workers. Its appearance at every level of analysis could indicate a unique opportunity for Ozark to capitalize on a strong local industry that contributes to larger, regional trends.

Distribution Industry Concentration - 50 mi. Radius

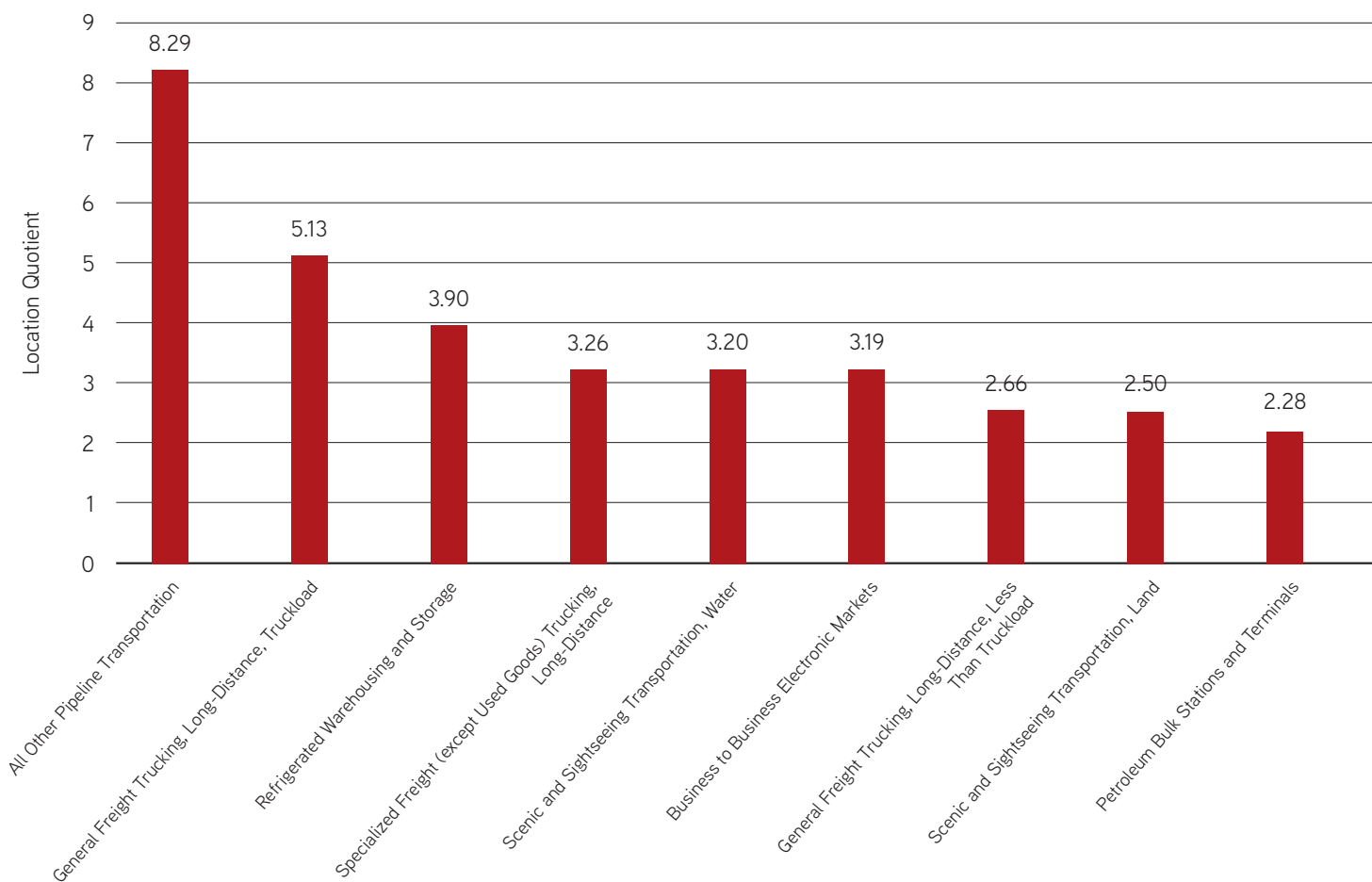


Figure 15: Distribution Industry Concentration in the 50 mi. Radius

NAICS	Industry	Location Quotient	2020 Jobs
486990	All Other Pipeline Transportation	8.29	13
484121	General Freight Trucking, Long-Distance, Truckload	5.13	6,472
493120	Refrigerated Warehousing and Storage	3.90	521
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	3.26	901
487210	Scenic and Sightseeing Transportation, Water	3.20	86
425110	Business to Business Electronic Markets	3.19	197
484122	General Freight Trucking, Long-Distance, Less Than Truckload	2.66	1,441
487110	Scenic and Sightseeing Transportation, Land	2.50	41
424710	Petroleum Bulk Stations and Terminals	2.28	158
424940	Tobacco and Tobacco Product Merchant Wholesalers	1.89	93

Figure 16: Distribution Location Quotient and Jobs in the 50 mi. Radius

MOST COMPETITIVE INDUSTRIES (ALL INDUSTRIES)

The Full-Service Restaurants industry is at the top of the regional competitiveness rankings; however, the industry lost jobs in the last five years. The industry was expected to lose 2,484 jobs, but only 1,560 jobs were lost in the region between 2016 and 2020. Thus, the industry is shrinking at the regional level, albeit at a slower pace than was expected. The Motor Vehicle Supplies and New Parts Merchant Wholesalers industry is highly competitive and is the only wholesaler industry with a highly ranked competitive effect at the regional level. The industry provides 1,938 jobs.

The only distribution-related industry which is ranked highly amongst all other industries is the Long-Distance Truckload General Freight Trucking industry, which added nearly 900 more jobs than expected in the last five years. In total, the industry provides nearly 6,500 jobs within the region.

NAICS	Industry	Industry Mix Effect	National Growth Effect	Expected Change	Competitive Effect	2020 Jobs
722511	Full-Service Restaurants	(2,676)	(172)	(2,848)	1,288	10,187
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	8	(12)	(3)	1,144	1,938
522390	Other Activities Related to Credit Intermediation	(2)	(1)	(2)	1,043	1,088
484121	General Freight Trucking, Long-Distance, Truckload	173	(80)	92	897	6,472
622110	General Medical and Surgical Hospitals	481	(232)	249	752	16,790
903611	Elementary and Secondary Schools (Local Government)	(297)	(237)	(534)	550	16,205
561720	Janitorial Services	12	(26)	(14)	528	2,291
452311	Warehouse Clubs and Supercenters	6	(99)	(93)	487	7,144
721110	Hotels (except Casino Hotels) and Motels	(1,499)	(81)	(1,580)	477	4,454
444110	Home Centers	191	(23)	168	448	2,174

Figure 17: Industry Competitiveness in the 50 mi. Radius

MOST COMPETITIVE DISTRIBUTION INDUSTRIES

The Long-Distance Truckload General Freight Trucking industry is the most competitive distribution industry in the region, and its inclusion at the top of the rankings of all industries for competitive effect indicates its promise as a growing industry. Of the distribution industries, transportation and trucking are the most competitive at the regional level. Local and long-distance general freight trucking businesses employ more than 7,000 workers in the region, and they collectively added nearly 1,100 jobs in the last five years. Two transportation industries (Scheduled Passenger Air Transportation and All Other Transit and Ground Passenger Transportation) are highly competitive as well; together, they added 160 jobs in the last five years.

NAICS	Industry	Industry Mix Effect	National Growth Effect	Expected Change	Competitive Effect	2020 Jobs
484121	General Freight Trucking, Long-Distance, Truckload	173	(80)	92	897	6,472
484110	General Freight Trucking, Local	26	(5)	21	195	573
425110	Business to Business Electronic Markets	(13)	(2)	(14)	97	197
481111	Scheduled Passenger Air Transportation	(1)	(1)	(2)	92	140
424470	Meat and Meat Product Merchant Wholesalers	1	(0)	1	73	105
485999	All Other Transit and Ground Passenger Transportation	(1)	(0)	(1)	71	74
423830	Industrial Machinery and Equipment Merchant Wholesalers	27	(7)	19	66	591
492110	Couriers and Express Delivery Services	370	(12)	358	62	1,250
532412	Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing	14	(1)	13	51	142
493120	Refrigerated Warehousing and Storage	71	(6)	65	46	521

Figure 18: Distribution Industry Competitiveness in the 50 mi. Radius

AREA THEMES

At the regional level, new trends start to emerge. Manufacturing industries are some of the most highly concentrated but not necessarily the most competitive industries. Their high concentration and minimal growth could indicate limited potential for those industries in the future. Many of the quality-of-place industries, like those that include restaurants, are competitive within the region but shrinking. At more local levels, those industries are both competitive and growing. Distribution industries provide a large number of jobs, and many transportation and trucking industries are both highly concentrated and growing.

Trends identified at this scope of analysis are regional and might not necessarily align with Ozark or Christian County's local trends. In fact, local opportunities might justify actions which contradict regional trends. If, for example, some unique advantage of Ozark or Christian County makes investing in restaurants profitable, it could make sense to disregard the regional data which support movement away from those quality-of-place industries; locally, the data all indicate that those industries could be profitable, worthwhile investments. However, there could also exist the potential to support local industries or businesses locally that contribute to or align with larger, regional economic trends. The Business to Business Electronic Markets industry, for example, is strong within Ozark and aligns with larger, regional growth trends. Ultimately, an understanding of local, semi-local and regional economic trends collectively is important for the development of a robust economic plan.



Targeted Industry Analysis

Finally, an industry cluster analysis was conducted that combines industry data from the local, regional, and national levels to rank the area's top subclusters. Local data included information from within the 65721 ZIP code, regional data included information for all counties within the Southwest Missouri Council of Governments (SMCOG) region, and national data included information for the rest of the country.

In order to rank the area's top subclusters, factors like growth, annual earnings, concentration, and imports were measured; the objective of the Targeted Industry Analysis is to provide a 'bigger picture' look at all of the industry clusters in the area, and to combine data from different geographic scopes, as well as data which measure different indicators of opportunity, into a single, cohesive analysis. The top twelve subclusters as ranked by the Targeted Industry Analysis model are listed in the graphic below (see appendix for a list of all industries within each subcluster).

The Hospital subcluster understandably scored highly in this analysis, as the data are recent enough to account for the effects of the COVID-19 pandemic. The second most highly ranked subcluster is the Trailers and Motor Homes subcluster, which aligns with the previous analyses; the industries within this subcluster are growing, highly concentrated, and competitive. Ammunition-related industries were also noteworthy in the analyses conducted at the local level, and the Ammunition subcluster reappears in this analysis.

In addition, many manufacturing subclusters are ranked highly, including Metal Product, Iron and Steel Mills and Forging, and Personal Care and Cleaning products. The Industrial Products and Services Wholesaling industry is also at the top of the list; many wholesaling industries were demonstrated to be highly concentrated and competitive in the analyses conducted for each of the focus areas above, which indicates opportunity for further growth.

Two of the e-commerce related industries are ranked highly; Electronic and Catalog Shopping and Computer Services subclusters are growing and competitive and could be opportunities for investment in the ever-changing technology industries. This, too, is consistent with many of the findings above; the Business to Business Electronic Markets industry appeared in the analyses for every focus area above. Finally, the Performing Artist subcluster is another quality-of-place subcluster with potential, many of which were noted as having potential in previous analyses.



Hospitals



Trailers and Motor Homes



Business Support Services



Ammunition



Metal Products



Iron and Steel Mills and Forging



Personal Care and Cleaning Products



Industrial Repair Services



Industrial Products and Services Wholesaling



Electronic and Catalog Shopping



Performing Artists



Computer Services

Figure 19: Possible Target Industries

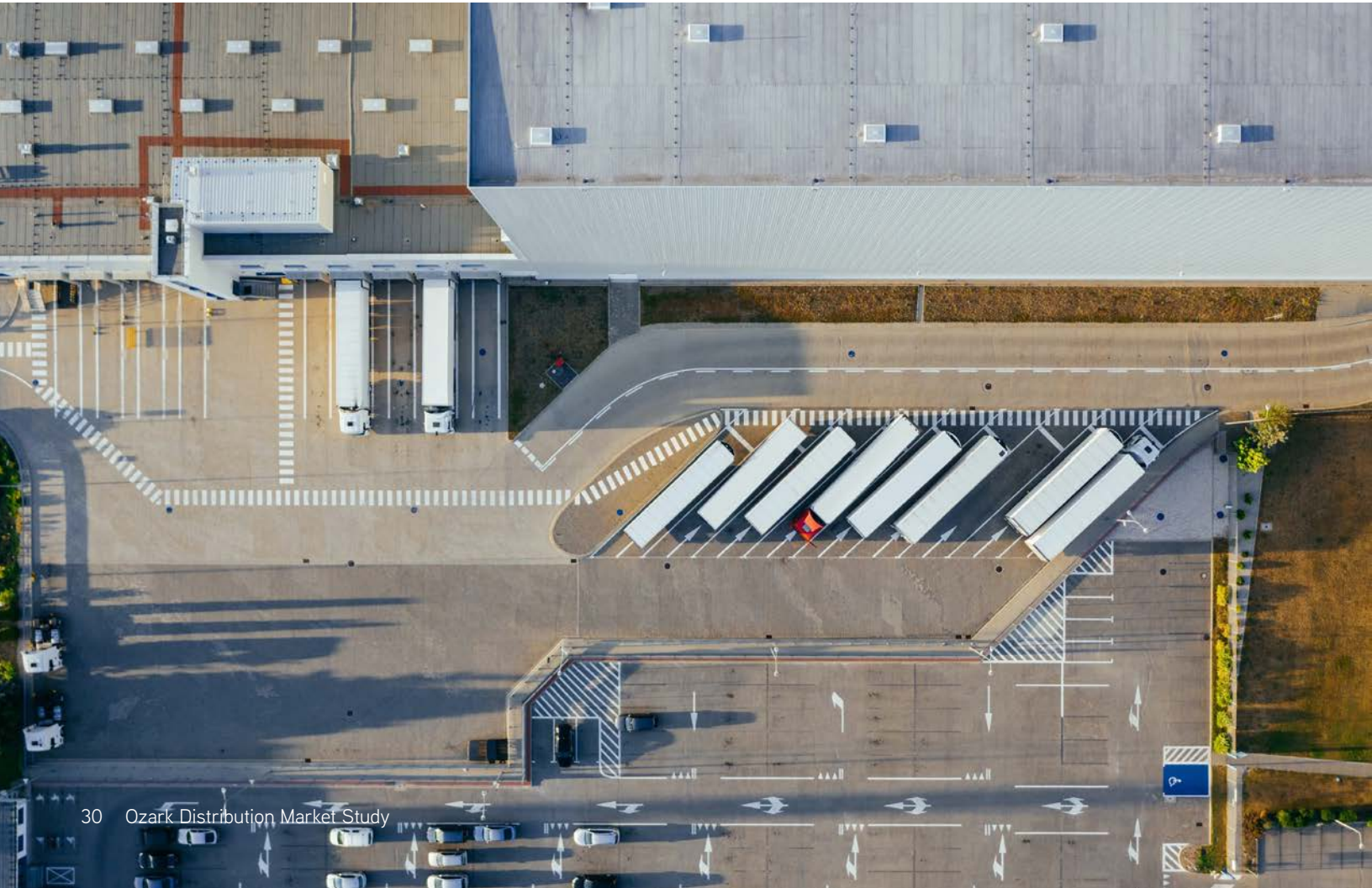
KEY FINDINGS

Distribution Industry Potential

In order to understand the opportunities that have the greatest potential for economic development, it is important to explore the unique characteristics of the region. The SWOT and data analyses together helped to identify defining qualities of Ozark and the surrounding area, and knowledge of these qualities can inform a decision to focus on attracting one particular industry over another. Ozark's proximity to larger cities, transportation infrastructure, and development resources make it well-suited to capitalize on promising economic trends.

The findings of the data analyses above indicate great potential for distribution industries in Ozark, Christian County, and the greater southwest Missouri region. More specifically, trucking, general transportation, and equipment wholesaling industries are growing, competitive industries in which further investment could be profitable. Many of these industries are highly concentrated within the area, which makes surrounding economies dependent upon Ozark's provision of the goods and services. They are not as easily accessible elsewhere. Moreover, many distribution industries within the Ozark region have demonstrated to be competitive when compared to similar industries or regions throughout the rest of the country.

Ozark's region is uniquely positioned to capitalize on the larger-scale distribution trends. A strong economic plan leverages regional advantages wherever possible, and the analyses presented in this report indicate that Ozark is uniquely well-positioned to make growing, competitive distribution industries a more central part of the local economy.



Industries for Higher Educational Attainment Population

Ozark has a large population of highly educated residents. This stood out as a significant opportunity to capitalize on. While the city, county, and region offer economic conditions and competitive advantages for distribution industries, occupations in these industries tend to offer lower to moderate wages and typically require lower educational attainment. A significant opportunity may be looking to attract businesses to Ozark that require higher education attainment to build on this local strength. This is demonstrated in the figure below.

Educational Attainment (2021)

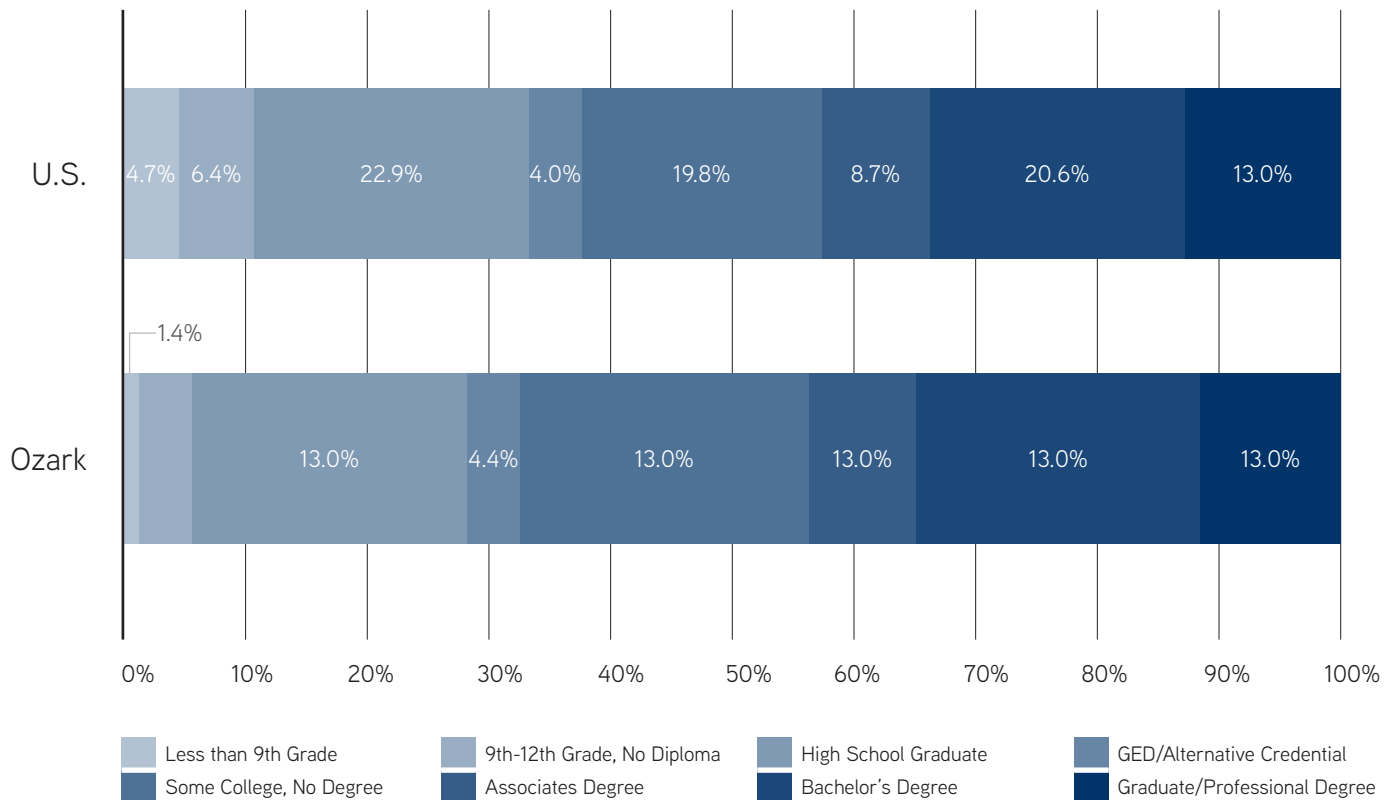


Figure 20: Educational Attainment

Currently, many city residents commute out of Ozark and into Springfield for work because Ozark tends to be a bedroom community. Ozark has an abundance of higher-end homes that are attractive for educated professionals and executives, but most of these individuals work in Springfield. Conversely, qualitative interviews suggest that many of those working in distribution industries commute into Ozark from Springfield or the surrounding rural areas. Businesses in advanced manufacturing, medical, technology and scientific sectors may see advantages of Ozark due to its higher levels of educational attainment. Having more opportunities for Ozark residents to work in the same city that they live in could enhance quality of life and increase tax revenues, as more people would work and spend money within the city during the day.

Quality of Place Opportunities

Ozark offers a unique quality of life and community character. The city is continuing to improve its charm through a downtown streetscape project. Private developers are also helping to enhance Ozark's quality of place. Finley Farms and the Ozark Mill are an example of a private project that has already enhanced quality of place and will continue to grow as an attraction. The city has also experienced strong commercial development along with its residential development and population boom. These trends combined with large volume of traffic traveling on Highway 65 especially between Springfield and Branson create an opportunity for Ozark to build on quality of place and develop additional infrastructure to drive tourism.

While the city has a growing number of attractions that draw residents and visitors, there is not an adequate supply of quality hotels. Currently Airbnb is the most viable lodging option for visitors. In order to increase the number of visitors the city can attract, it should explore the feasibility of developing quality hotels. Additional hotels would allow more visitors to stay in the city and increase the amount of spending at local businesses.

Utility/Infrastructure Constraints

The City of Ozark has a large amount of developable land that could support economic development; however, many of these potential sites are not shovel-ready. One of the larger impediments identified during this study is a lack of utilities connections to sites. Businesses and developers usually select sites that allow for the quickest time to market and have infrastructure in place to expedite construction.

Developers and stakeholders noted challenges caused by the lack of shovel ready sites. In some cases, developers or projects who have been required to finance site improvements, such as utilities connections and roadways. Shouldering the cost of these improvements can make it challenging for developments to pencil out and be economically feasible. For this reason, some developers and businesses have selected Ozark's competitors for the location of economic development projects.

One such example is Convoy of Hope, which initially purchased property in Ozark but decided to develop a distribution center in Republic, MO because the cost of privately financing utilities and infrastructure improvements in Ozark was not financially feasible for the project. The lack of shovel-ready sites with utilities and transportation access has caused lost economic development opportunities for Ozark. The city may continue to miss out on development opportunities if this is not addressed. It is important to note that without infrastructure and roadway connection economic development projects will be more challenging to attract to the city, no matter local and regional economic trends and industry sector strengths.

Taxation and Residential Engagement

One of the greatest threats Ozark faces is city's ability to generate revenue. The city generates most revenue through local sales tax which is limited as this is typically collected from sales of local commercial businesses. It has been challenging for the city to generate revenue at a rate that keeps pace with residential and population growth. While residential development increases property tax, this tax is administered by Christian County and revenue is mostly provided to the public school system. For this reason, development of single-family homes makes service provision more challenging, as residents living in new homes and subdivisions require additional city services, but the city is not able to collect additional property tax revenue to keep pace with this growth.

To generate revenue needed to finance infrastructure, utilities improvements, and additional public services, the city needs to maintain and develop new methods to generate tax revenues. One tax method the city has attempted to implement is an online sales use tax. Currently, no taxes are collected on online purchases in Ozark. However, other regional cities and competitors, such as Nixa, MO, have been able to pass this tax. This puts Ozark at a disadvantage when it comes to economic development, as it does not have access to the same revenue generating resources to fund infrastructure and utilities improvements that other regional communities do. The city attempted to pass an online use sales tax, but it was not approved by voters the last time it was placed on the ballot.

In general, there is an anti-tax sentiment among Ozark residents. The city is working to provide education opportunities to residents on the importance of additional revenue channels like an online use sales tax. Education opportunities also exist around the transportation sales tax. The transportation sales tax allows the city to collect an additional 3/8 cent sales tax to support transportation infrastructure upgrades. This was implemented in 2017 and is up for vote again in April 2022. It is critical for the city's Road improvement projects that this tax renewal is passed. The city should continue to engage in resident education on the importance of local taxes to ensure existing revenue streams are maintained and new ones can be accessed.



RECOMMENDATIONS & CONCLUSIONS

Summary recommendations for the City of Ozark were informed by a methodology that included quantitative data analysis, historical document review, an on-site visit, and one-one-one and group interviews with key city leaders across the civic, business, and resident community. These recommendations are based on the following conclusions:

1. Ozark must do everything in the city's power to keep up with growth. This should be a primary focus for elected officials. The renewal of the transportation sales tax must occur to ensure city government can keep pace with growth and elected officials should do everything in their power to ensure this is passed.
2. Ozark should ensure utilities are sufficient to support growth, and broadband is of significant importance. Businesses need to have reliable internet to support operations and reliable broadband coverage throughout the city will greatly help business retention and attraction efforts.
3. Ozark needs to prioritize hospitality infrastructure especially hotels as this will promote tourism growth and drive increased sales tax revenues. Focusing on quality of place should be a pillar of the city's economic development strategy.
4. Placing emphasis on these priority areas, will breed a variety of additional economic development opportunities including the ability to attract distribution and e-commerce businesses.

To address these conclusions and leverage existing assets and fill gaps and deficiencies, five key strategic themes have been identified. These strategic themes should be considered key components to any decision-making process that intentionally seeks to position the City of Ozark as a Warehouse and Distribution Hub. Each of the strategic themes will be outlined in more detail below. The strategic themes include:

1. Resident Engagement and Taxation
2. Development Process Improvements
3. Critical Infrastructure Improvements and Site Preparedness
4. Structural Changes and Public Funding
5. Quality of Place and Tourism

Resident Engagement and Taxation

A significant challenge for the city is the ability to generate revenue because it relies heavily on sales tax. Ozark needs to pass additional taxes in order to fund improvements to promote development. In order to do this, city officials should engage residents on the necessity of taxes to fund in-demand improvements from businesses and residents. City leaders should develop long-term strategies to consistently seek and garner purposeful engagement with city residents. Consistent engagement, education, and communication will allow city stakeholders to implement strategic initiatives that are supported by residents in the city. An immediate priority for the city should be ensuring the Transportation Sales Tax remains in place. This will require significant resident engagement.

In 2017 the voters of Ozark passed the city's first ever Transportation Sales Tax (TST). An unprecedented commitment from residents to support transportation improvements, the 3/8 cents transportation tax has generated over \$2.3 million in funding to support dozens of critical transportation improvements across the city. The TST is set to expire, and it is essential that city hall demonstrates its commitment to transportation improvements by extending the tax another 5 years. While it is never easy to garner support for a tax increase, it is imperative that city leaders and other vested stakeholders develop and communicate a compelling case for the program's expansion. This will require both a coordinated and intentional marketing strategy and a grassroots effort to educate the residents of Ozark how continued improvement to transportation arteries will enhance the economic potential of the city and the region.

A second recommendation is for the city to pursue an online sales tax. Currently, the city does not receive sales tax revenue from online sales transactions. If the city pursues distribution and e-commerce industries, additional stresses on Ozark's revenue stream could be created due to existing taxing structures. Other regional communities like Republic and Nixa have passed online sales tax that give them additional revenues to finance infrastructure improvements. The city should engage residents on benefits of an ecommerce sales tax through a variety of methods including public forums, townhalls, as well as online and social media postings. It is recommended that the City focus on public engagement for an e-commerce sales tax after the voting on the transportation sales tax is completed, as it is critical to Ozark's ability to collect revenue.

Development Process Improvements

Ozark should consider improvements to its development process in order for the City to attract new development and support economic development projects. This includes streamlining the permitting process and creating efficiencies between government departments and special road districts. To support structural changes to the development process, the city should evaluate, assess, and redesign current development processes and policies to accommodate private developers eager to develop property suitable for targeted companies in the distribution and warehousing industry.

Redundancies and inefficiencies in the city's development process can be addressed through redesign, consolidation, and technological advancements to better accommodate private developers. Efforts to eliminate perceived 'red-tape' should be the cultural foundation of city actors looking to facilitate an environment that encourages and enables commercial and industrial real estate development. Change agents should consider ways officials and city staff can enhance customer service to better serve the needs of the private development and business community. Intentional engagement with private developers and two-way communication is a necessity to understand current pinch-points in the development process. Efforts

should be made to accommodate developers while maintaining the integrity of the of the main objectives of current processes including safety and environmentally sustainable development.

Critical Infrastructure Improvements and Site Preparedness

The most urgent need for Ozark is to continue to address needed infrastructure improvements. The city should explore creative options to help finance site preparedness to address lack of shovel-ready sites. No matter a region's target industry strategy, current and suitable infrastructure is a critical component to transformative economic development. City leaders should work with state and federal partners to identify, apply, advocate, and procure public funds to address infrastructure deficiencies and gaps in office, commercial, industrial, and warehouse supply at strategic sites across the city. Notably, the city should focus on the need for improved broadband coverage across the city. With unprecedented funding from the federal government available and expected to continue in the future, the city should take advantage of the unique opportunity to ensure that state-of-the-art broadband is accessible and affordable to commercial users. Further, City leaders should consider in-roads that can be made to gain greater control of local infrastructure assets, including broadband and electric utilities. Improving critical infrastructure will catalyze site development from the private sector across the city, which is a demonstrated need.

Structural Changes and Public Funding

To unlock public funding, the city needs to address several structural issues. First, the city should study and evaluate its current city structure. One strategy that should be studied is the transition to a charter government. In local government, a charter is a document by which the state grants certain rights, powers, privileges, or functions to some local government organization; in other words, a charter would increase the local control of the council. The processes, laws, or statutes mandated by the council could differ substantially from those observed at the state level if they

do not contradict the state legislation. Once drafted, the charter would require the approval of voters to become operational. Other communities like Nixa, Republic, and Springfield have all been successful in implementing charter governments.

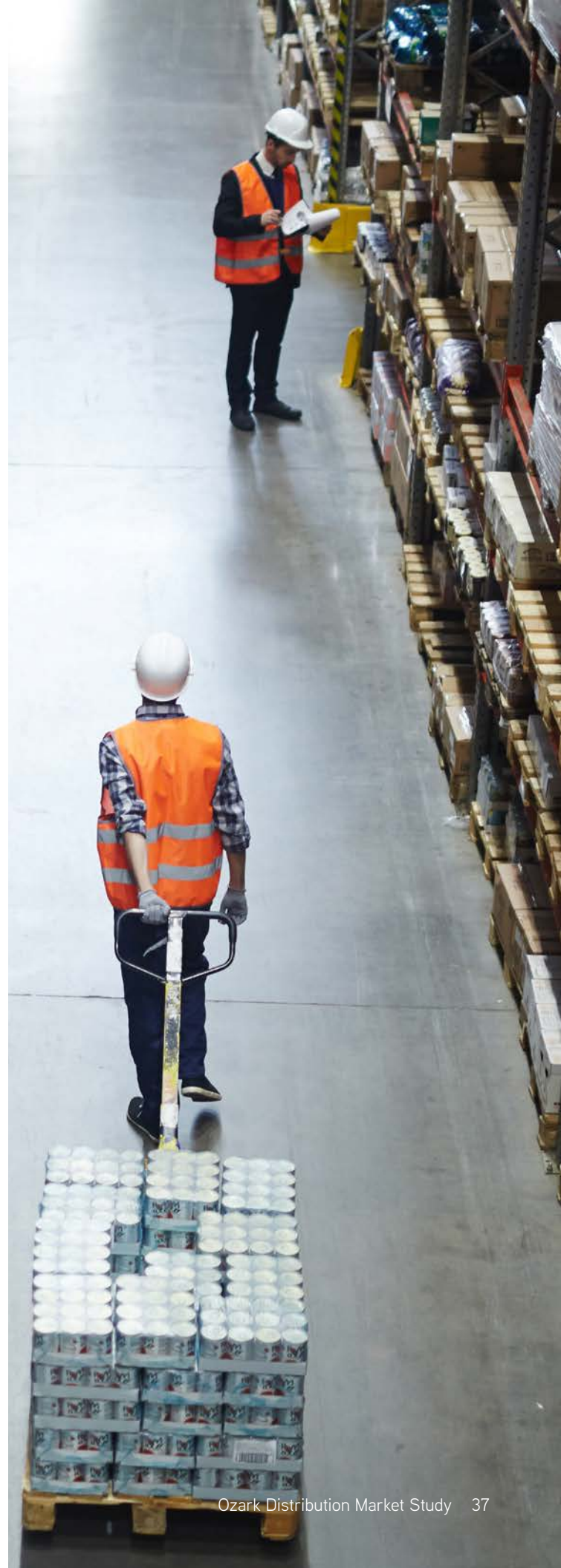
A charter makes local government operations more efficient since it allows for many legal processes to be carried out at the local level. Permitting processes, for example, could be expedited under a charter government. City leaders should explore the feasibility of transitioning to a charter government and aim to understand the efficiencies which might be created in doing so. Further, the city should consider reactivating the Industrial Development Authority and other public authorities required to catalyze economic development. These entities may already be in place, but current charters and governance structures will need to be evaluated before being reactivated. The public structures should aim to compliment and collaborate with current economic development organizations across the region. Additive or complimentary functionalities could include site acquisition, remediation, and deploying a mix of financing facilities and development incentives to accelerate private sector development.

The IDA would be able to issue tax-exempt incentives to businesses by acting as a conduit for tax free low interest rate bond financing. This could include incentives provided to developers for the construction, improvement, rehabilitation revitalization and financing of industrial, specialized, commercial, manufacturing enterprises. Financing can be offered at favorable rates with long repayment terms. Incentives could be applied to acquisition, development of utility infrastructure, construction of new facilities, additions or renovations to existing structures, and equipment purchases. The IDA could be a tool that helps developers access funding to finance projects that would otherwise be difficult to pencil out. In addition to the IDA, the city should also allocate resources to build capacity to structure private-public-partnership structures to leverage potential private investment with available public financing tools and look at other tools such as Tax Increment Financing (TIF).

Ozark does not have Enterprise Zones or Opportunity Zones which could be leveraged by developers and businesses for additional incentives. However, it could leverage TIF financing to help support additional economic development projects. TIFs allow communities to collect a portion or increment of local property and sales taxes to assist funding the redevelopment of certain designated areas. Areas eligible for Local TIF must contain property classified as a "Blighted", "Conservation" or an "Economic Development" area, or any combination thereof, as defined by Missouri Statutes. An economic development area must be located within the city limits of Ozark, is not considered a blighted area, or a conservation area, and is an area that the city finds that redevelopment will:

1. discourage commerce, industry, or manufactures from moving their operations to another state;
2. result in increased employment in the municipality;
3. or result in preservation or enhancement of the tax base of the municipality

Based on these criteria, Ozark could identify an Economic Development area to promote creation of a TIF. Along with designating this area, the city would establish a TIF commission, a redevelopment plan for the proposed area, and hold a public meeting and make a recommendation on the redevelopment plan. A TIF would help address many financing challenges in specific areas and would complement the incentives offered by and IDA.



Quality of Place and Tourism

Ozark offers a unique quality of place that is gaining appeal. It includes a small town charm, quality housing, strong public schools, and access to urban amenities. The city should focus on this momentum to enhance quality of place to attract new residents and visitors.

Companies and their employees are often focused on one key variable: Do I want to live here? The City of Ozark should recognize and build upon its impressive quality of life. With proximity to Springfield and Branson, Ozark offers a small-town charm desirable to a cross-section of professionals. Current private investment in placemaking efforts should continue to be supported and complimented with smart and strategic investment in quality of place initiatives. Quality public education, housing, and natural assets should be nourished and marketed to a set of potential new residents in the community. Recreation and tourism-related industries and assets should be strengthened with purposeful investment and care. Opportunities to facilitate increasing retail growth should be at the forefront of a city strategy, with a particular focus on a strategy to build athletic and sporting amenities and available hotel amenities at a diversity of price points.

Ozark lacks infrastructure to support tourism. The most glaring need is for quality hotels. It is recommended that the city pursue a hospitality feasibility study to understand the size and type of hotels that could be developed in Ozark. This study could then be taken to developers to demonstrate development potential and project viability. It is important to emphasize that the City will not be able to fully leverage its tourism potential without additional hotel capacity. Development of additional hotel infrastructure will allow visitors to stay in Ozark for longer periods of time and enjoy the quality of life the community offers. Hotels could also help develop the amateur sports industry.

Amateur sports may be an opportunity for the City of Ozark focus economic development efforts. Amateur sports can draw visitors from throughout the United States to Ozark who will support local commercial businesses. Ozark also has a significant amount of land and existing sports amenities, such as US Baseball Park, that could be promote additional sports related development. The city should continue to explore feasibility of amateur sports related development, but it needs to ensure supporting infrastructure like hotels is developed as well.

Ozark residents have above average educational attainment compared to state and national averages. The current job market is very competitive as businesses are stretched to find talent and people. As a desirable place to live with quality schools, Ozark has been able to attract residents and talent. The city should leverage these trends and focus economic development efforts on businesses and sectors that rely on educated talent. This includes advanced manufacturing, technology, research and development, medical, and professional services related businesses. To accomplish this, Ozark should ensure it is a welcoming place for both businesses and residents to promote the achievements of existing residents, and ensure it has shovel-ready sites available and ready for prospective businesses.

APPENDIX

Industry Cluster	Industries
Hospitals	<ul style="list-style-type: none"> • General Medical and Surgical Hospitals • Psychiatric and Substance Abuse Hospitals • Specialty (except Psychiatric and Substance Abuse) Hospitals • Hospitals (State Government) • Hospitals (Local Government)
Trailers and Motor Homes	<ul style="list-style-type: none"> • Truck Trailer Manufacturing • Motor Home Manufacturing • Travel Trailer and Camper Manufacturing
Business Support Services	<ul style="list-style-type: none"> • Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) • All Other Legal Services • Payroll Services • Translation and Interpretation Services • All Other Professional, Scientific, and Technical Services • Facilities Support Services • Professional Employer Organizations • Telephone Answering Services • Telemarketing Bureaus • Convention and Trade Show Organizers
Ammunition	<ul style="list-style-type: none"> • Small Arms Ammunition Manufacturing • Ammunition (except Small Arms) Manufacturing • Small Arms Manufacturing • Other Ordnance and Accessories Manufacturing

Industry Cluster	Industries
Metal Products	<ul style="list-style-type: none"> • Iron and Steel Pipe and Tube Manufacturing from Purchased Steel • Crown and Closure Manufacturing • Metal Stamping • Powder Metallurgy Part Manufacturing • Metal Crown, Closure, and Other Metal Stamping (except Automotive) • Cutlery and Flatware (except Precious) Manufacturing • Hand and Edge Tool Manufacturing • Saw Blade and Handsaw Manufacturing • Kitchen Utensil, Pot, and Pan Manufacturing • Metal Kitchen Cookware, Utensil, Cutlery, and Flatware (except Precious) Manufacturing • Saw Blade and Handtool Manufacturing • Metal Window and Door Manufacturing • Ornamental and Architectural Metal Work Manufacturing • Hardware Manufacturing • Industrial Pattern Manufacturing • Enameled Iron and Metal Sanitary Ware Manufacturing • All Other Miscellaneous Fabricated Metal Product Manufacturing
Iron and Steel Mills and Forging	<ul style="list-style-type: none"> • Iron and Steel Mills and Ferroalloy Manufacturing • Iron and Steel Mills • Electrometallurgical Ferroalloy Product Manufacturing • Iron and Steel Forging
Personal Care and Cleaning Products	<ul style="list-style-type: none"> • Soap and Other Detergent Manufacturing • Polish and Other Sanitation Good Manufacturing • Surface Active Agent Manufacturing • Toilet Preparation Manufacturing
Industrial Repair Services	<ul style="list-style-type: none"> • Other Electronic and Precision Equipment Repair and Maintenance

Industry Cluster**Industries**

Industrial Products and Services
Wholesaling

- Recyclable Material Wholesalers
- Other Miscellaneous Durable Goods Wholesalers
- Recyclable Material Merchant Wholesalers
- Other Miscellaneous Durable Goods Merchant Wholesalers

Electronic and Catalog Shopping

- Business to Business Electronic Markets
- Electronic Shopping & Mail-Order Houses-Rtl
- Electronic Shopping and Mail-Order Houses
- Electronic Shopping
- Electronic Auctions
- Mail-Order Houses

Performing Artists

- Theater Companies and Dinner Theaters
- Dance Companies
- Musical Groups and Artists
- Other Performing Arts Companies
- Independent Artists, Writers, and Performers

Computer Services

- Data Processing Services
- Data Processing, Hosting, and Related Services
- Custom Computer Programming Services
- Computer Systems Design Services
- Computer Facilities Management Services
- Other Computer Related Services



THOMAS P. MILLER & ASSOCIATES