



2017

**EASTERN OZARKS
RURAL ARTISAN INNOVATION
FEASIBILITY STUDY**



**SOUTHEAST MISSOURI
STATE UNIVERSITY · 1873**

Economic and Business Engagement Center



Prepared For
Ozark Vitality

Prepared By
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Engagement Center Mission

To foster business, community, and workforce development and facilitate the process of innovation to enhance the regional economy and support the transfer of institutional knowledge and resources derived from within the University to the external environment to create new, high-value jobs, positive economic and social benefits, and advance entrepreneurship.

History

In 2003, the Innovation Center and closely allied nonprofit organization Missouri Research Corporation were launched to support Southeast Missouri State University's strategic priority to advance the region's economic appeal and strength by accelerating local and regional economic growth and development. Over the next several years, those entities' efforts included offering business development services, business incubator space, entrepreneurial training, access to capital, research, technical assistance, and more. In 2006, the entities partnered with the Kauffman Foundation and the Delta Regional Authority to offer trainings for aspiring and early-stage entrepreneurs in Missouri, Kentucky, and Tennessee. By 2011, there had been over 600 participants trained through the program resulting in 281 new businesses. The Kauffman Foundation then joined with the nonprofit to continue the development and distribution of the program nationwide to over 150 affiliate organizations. In 2013, the U.S. Department of Commerce awarded Southeast the designation of an Economic Development Administration (EDA) University Center, and the nonprofit was renamed the Missouri Innovation Corporation (MIC) to reflect its development into more entrepreneurial and economic development activity. With this rapid growth of both outreach and student-focused efforts, there was a separation to better serve each group resulting in the now Economic and Business Engagement Center primarily serving the external community.

Dedication

In the midst of this feasibility study, a natural disaster struck the eastern Ozarks. Heavy rains during the last week in April and first week of May 2017 caused many eastern Ozark rivers to reach record highs leading to massive flooding. Damage was extensive in the region, but was particularly severe in Pocahontas, Arkansas (Black River), Doniphan and Van Buren, Missouri (Current River), Thomasville, Missouri (Eleven Point River) and Eminence, Missouri (Jacks Fork River). Flood recovery continues in the region as this report is being finalized, and for many people, the end is still not in sight. We dedicate this study to those affected by the flooding and to the community spirit that was displayed as neighbor helped neighbor to cope with the crisis.

Appreciation

Special thanks to project partners, Dr. Van Ayers and Cammie Younger from University of Missouri Extension, for coordinating the community workshops and collecting data for this study. Also, a huge thank you to the team at Ozark Vitality, Tami Hale, Rickie Maples, Alice Shelton, and Graycen Colbert-Bigger, for your leadership and support.

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Executive Summary

Ozark Vitality, a non-profit community organization seeking to spur economic revitalization in the Ozarks, has proposed creating an Artisan Innovation Hub to support the artisans in a six-county region of southeast Missouri and northeast Arkansas. The goal of the Hub is to expand artisan production, marketing and sales in order to increase incomes and regional vitality. The market for handmade arts and crafts is expanding. There is an opportunity for skilled artisans to sell their arts and crafts and enhance their income. However, often artisans need support with production and marketing in order to be successful in selling their creative work. This is the role the Artisan Innovation Hub would fill, if deemed feasible.

Study Goals

This study is intended to determine the feasibility of the project and suggest potential design elements of the innovation hub.

Key Questions to Consider:

- How can the project meet the needs of artisans?
- Is there sufficient market demand for Ozark arts and crafts, and adequate supply?
- How should the artisan hub be designed and implemented for sustainability?
- Is the project financially feasible?

To address these questions, information was gathered from a variety of sources including participation at six regional workshops with artisans and supporters of the arts, input from artisans and community stakeholders through a survey and personal interviews; a review of secondary data on the economy, retail sales, and lifestyle segments of the region, a survey of tourists who visit the many scenic rivers in the region; numerous meetings with project staff from Ozark Vitality; participation at a Creative Place-making Seminar offered by the Delta Regional Authority (DRA) in Paducah, KY; and case study visits to Paducah, KY, Helena, AR and Rushville, IL.

Major Findings

- In researching the current artistic assets of the region, important resources were discovered, including makerspaces for blacksmithing and heritage wood-working and venues for learning new artistic skills. As the project progresses, these organizations can be linked as part of the artisan hub network.

- The major need expressed by artisans is assistance with sales and marketing. This should be the a major of the Artisan Innovation Hub. Many artisans are also interested in technical assistance with their business; this could be provided in conjunction with the marketing and sales assistance, and through local support services such as the Small Business and Technology Development Centers (SBTDC).
- Nearly all artisans have the necessary physical space for their work and most have necessary equipment and supplies. Shared makerspaces may not be the initial focus of the Hub, but could play an important role in later phases of the project.
- The external demand for Ozark artisan products is significant. For example, recreational users of the scenic rivers in the region were identified as a potential market. This group has above-average incomes, loyalty to the Ozarks, fondness for Ozark communities, and an interest in arts and crafts.
- Although the supply of arts and crafts is more difficult to measure, the diversity of products and potential for increased production seems adequate considering the high interest level among artisans in the project. The only caveat is that a significant percentage of artisans interviewed view their creative work as a leisure activity and do not want to become full-time producers of their art.
- Several opportunities for developing the project were identified during the study. The first opportunity involves the expansion of training and technical assistance and linking the artistic resources of the region together into a network. There will be various entry points into the system and coordination of support functions. As a part of this network development, virtual connectivity should be a priority.
- The second opportunity for the project should focus on the development of an online e-commerce platform devoted to the sale of Ozark handmade arts and crafts, along with training for artisans in business, entrepreneurship, and crafts. In conjunction with the e-commerce platform, the creation of a mobile art gallery to travel through the region and beyond as a demonstration project to showcase Ozark creative work and as a marketing tool for the e-commerce platform is a project worth consideration.
- The third opportunity would involve creation of new specialized makerspaces and possibly new physical retail outlets. For example, one location might specialize in fiber arts while another may focus on metal working. Furthermore, the creation of an Ozarks Art and Craft Trail would link communities together so that tourists could travel the trail and enjoy different art experiences at each stop.
- The project will have a positive economic impact on the region's economy. Projections estimate the impact will be the equivalent of adding 20 jobs to the region and increase sales in the independent artists industry cluster by nearly \$200,000. This is a conservative estimate of the economic impact. As the hub helps market festivals and other events, it will draw more visitors to the region and have an even greater impact on the local economy.
- Financial projections for the first five years of the project suggest it is financially feasible, but only with a significant grant to cover start-up costs and bolster cash flow. By year five, estimates suggest that nearly 75% of expenses would be covered by earned income. By year six, the Ozark Artisan Innovation Hub will not need to rely on grants to sustain itself, based on the projections. An important challenge that will affect its financial sustainability is the logistics of shipping products from a six-county region to the customer. It is recommended that the Ozark Artisan

Innovation Hub be organized as a non-profit entity so it can attract grants and donations for financial support.

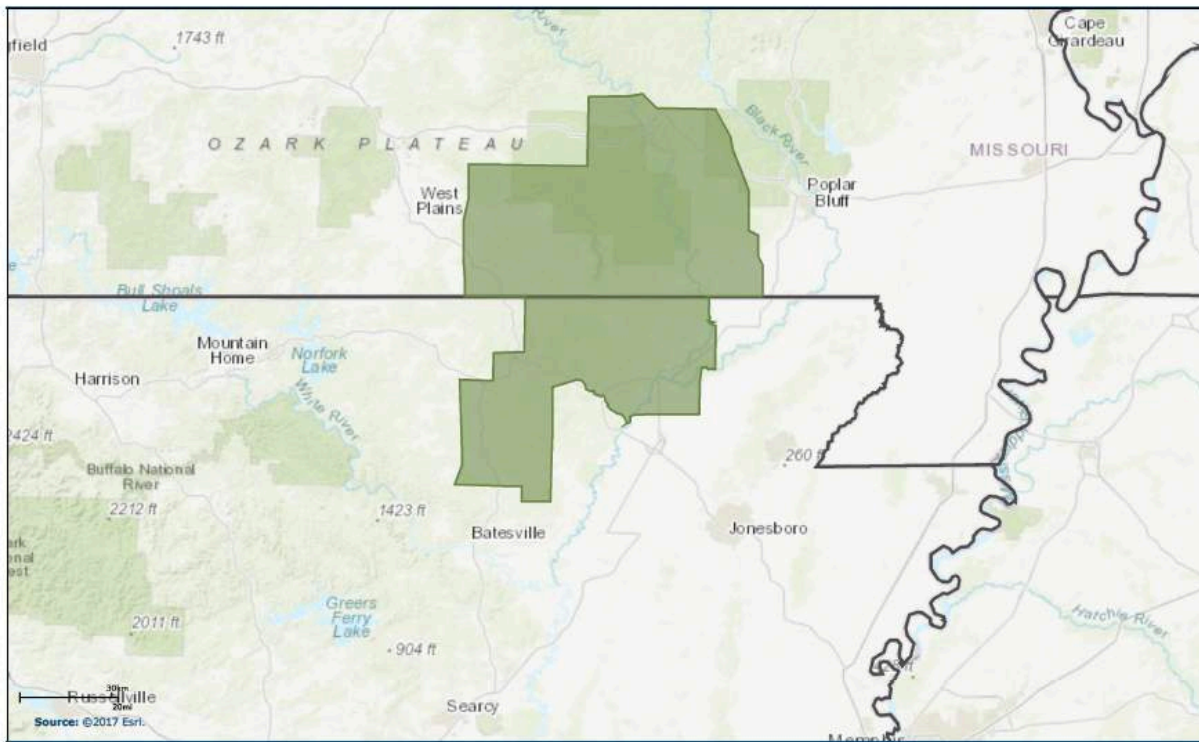
In summary, the Ozark Artisan Innovation Hub is a visionary project for capitalizing on a hidden resource in the Ozarks: the creative skills of its people. The Hub will help artisans and their families become more self-sufficient. It will have beneficial effects for others in the region due to increased tourism and influx of dollars from outside the region to purchase arts and crafts. Financially, the hub will require significant grant and sponsorship support for the first five years as it moves to sustainability from earned income.

Section 1: Introduction and Project Background

Ozark Vitality is a non-profit, community-based organization "building partnerships to create a better place to live, work and play in the Ozarks" (Ozark Vitality web site). It is a resource for community and economic development in the region under the leadership of President/CEO Tami Hale. A key project initiated by Ozark Vitality is the development of an Artisan Innovation Hub to be located in the eastern Ozarks. The Artisan Innovation Hub is a project to promote the creation and sales of handmade artisan products in the eastern Ozarks, a six-county region in southeast Missouri and northeast Arkansas in which all the counties have been classified as distressed by the Delta Regional Authority's FY2017 Distressed Counties and Parishes (www.dra.gov).

This is a region with high levels of poverty and low incomes, yet with beautiful scenic rivers and natural resources that are attractive to residents and tourists alike. Furthermore, the region has a long-standing tradition of skilled artists and craftspeople. The Innovation Hub intends to utilize this unique asset in expanding income in the region through increased sales of artisan products. The Ozark region evaluated consists of four Missouri Counties, Carter, Oregon, Ripley, Shannon and two Arkansas counties, Sharp and Randolph.

Figure 1: Regional Focus Area Map



Feasibility Study Scope and Approach

Specifically, Ozark Vitality and its partners are considering three possible areas of support for artisans:

- 1 Shared makerspaces; a makerspace is a creative, collaborative space where people can gather to create, invent, and learn. In this case, the makerspace would contain tools, equipment, and supplies for members to create arts and crafts. In addition, there would be workshops and training opportunities so that artisans could enhance their skills. The makerspaces also facilitate networking among artisans that may lead to cooperative projects, new skill development, and/or enhanced marketing opportunities.
- 2 Sales and marketing; the Artisan Innovation Hub might include physical storefronts, presence at art and culture festivals, and/or an online platform to sell Ozark-made arts and crafts. Intensive marketing of the Ozark brand or "Made in Rural America" brand might expand the demand for handmade products to a national, or even international marketplace.
- 3 Business support; regional artisans would likely benefit from attention to the business aspect of their work. Counseling from small business experts could help them to improve aspects of their business, such as finance, production, or marketing. There is also the possibility of physical space in the Hub devoted to artisans where they could share office space and/or studio space, equipment, and possibly accounting, legal, and marketing services. Business advising would be readily available in the space.

This vision of support services for artisans covering a six-county region across two states is an audacious one. Nearly all artisan hubs, makerspaces, or business incubators are established to serve one community or small region. Clearly there are special challenges and benefits to expanding the scope to a six-county region. For example, though there will be strength in banding together in marketing the Ozarks, the logistics of shipping the craft products are complex. Furthermore, the potential investment in providing these regional services will be significant. For that reason, Ozark Vitality and its partners decided it would be prudent to undertake an initial project to build support for the Artisan Innovation Hub and to research market demand and artisan needs. The project Ozark Artisan Innovation Hub Feasibility & Design was created and received financial support from the Delta Regional Authority.

The Economic and Business Engagement Center at Southeast Missouri State University has lead responsibility for Phase 3 of the project. The task as defined in the grant proposal (Ozark Vitality) is to "conduct a thorough feasibility study of a regional artisan innovation hub to include:

1) estimate of the potential demand by artists and craftspeople and their needs, 2) assessment of economic impact in the region, 3) market analysis, including export market potential, 4) recommended services and design of the incubator, and 5) financial analysis of the incubator including detailed budget and cash flow analysis."

The sub-contract from Ozark Vitality to the Economic and Business Engagement Center provided more details on the tasks to be performed, as listed:

- Research case studies of similar projects in a similar geographic and demographic market.
- Determine potential demand of regional artists and craftspeople and their needs through primary research including survey development, one-on-one interviews, and focus group sessions as needed.
- Support Ozark Vitality in engaging a regional steering committee of community development leaders and participate in regional workshops to evaluate findings and outcomes.
- Perform secondary data collection, including demographic analysis to identify changes and trends in the region's population and economy as it relates to artisans, craftspeople, and all related fields.
- Perform market analysis including export market potential and identifying the retail market potential in Carter, Ripley, Oregon, and Shannon counties of Missouri and the Arkansas counties of Sharp and Randolph.
- Examine the potential market for artisan products among tourists on the Current River, Jacks Fork, Eleven Point, Spring River and related waterways.
- Perform financial analysis of the Artisan Innovation Hub including budget and projected cash flow forecasting. Perform site analysis of potential sites.
- Key outcomes of primary and secondary data analysis will be summarized, along with an outline of service recommendations for which the region should invest based on the Delta Regional Authority's Small Business and Entrepreneurship Policy Framework.
- Provide key findings and recommendation of the feasibility of a heritage artisan facility/project.

In order to accomplish these tasks, information was gathered from many sources including primary data, secondary data, and observations by participating in workshops and other project activities.

Information Sources

Workshop Participation

March 21, 2017 - Pocahontas, AR

March 23, 2017 – Thayer, MO

March 30, 2017 – Doniphan, MO

April 6, 2017 – Hardy, AR

April 11, 2017 – Van Buren, MO

July 18, 2017 – Eminence, MO

Artisan and Community Stakeholder Surveys

Survey of artisans and community stakeholders during the six workshops and at other events to determine artisan demand and needs

Steering Committee

Ozark Vitality, University of Missouri Extension, Southeast Missouri State University, with support from Ozark Foothills Regional Planning Commission participated in six steering committee meetings to discuss data and findings

Secondary Data

ESRI, EMSI, and Census data was collected and used to profile the economy of the region and to assess local demand for artisan products

Trainings/Seminars

Participation in the Creative Placemaking workshop provided by the Delta Regional Authority and held in Paducah, KY on June 26-27, 2017

Tourist Survey

Tourists who frequent the rivers of the region were surveyed to determine their interest and purchasing patterns for arts and crafts

Personal Interviews

Selected artisans were personally interviewed to gain a better understanding of their products, goals, and support needs

Regional Socio-Economic Profile and Population Trends

A glimpse into the social and economic conditions within the region make it clear that new income sources are needed. The goal of the Artisan Innovation Hub is to expand the flow of income into the region. As Tables 1 and 2 indicate, the eastern Ozarks region consisting of four counties in Missouri and two in Arkansas has income lagging the overall state of Missouri by more than \$8,000 per person. Furthermore, the poverty rate of nearly 24% indicates that more than one out of every five people in the region is living in poverty. Although not shown in a table, 2014 data from communitycommons.org also reveal that the percent of income from transfer payments averages at 39.5%, and labor earnings comprise no more than 60% of total income in any of the target counties. A rapidly increasing share of total income is from transfer payments, especially Social Security, Medicare, and Medicaid. This is in part due to the presence of older, retired persons, but also suggests that there is a need for more jobs and income from earned labor.

Table 1: 2016 Per Capita Income Source: ESRI	
	Per Capita Income
Eastern Ozarks Region	\$18,384
Missouri	\$26,572

Table 2: Economic Perspective Source: FRED.stlouisfed.org 2013-2015	
	Poverty Rate (3-year average)
Eastern Ozarks Region	23.9%
Missouri	15.4%

On a more positive note, population has increased in the eastern Ozarks region since 2000 (Table 3). By comparison, most rural regions have lost population over this time period. The population increase is due to in-migration; people are moving into the region at a much faster pace than Missouri as a whole. The increase in population is partly due to retired people relocating to scenic surroundings. As Table 4 indicates, the population in the region includes a higher percentage of senior citizens (age 65 and over) than in the state of Missouri as a whole.

Table 3: Population Trends (2000 Census and 2017 BAO ESRI estimate) Source: Business Analyst Online, ESRI, 2017, and statsamerica, 2000-2012					
	2000	2016	Change	Percent Change	Average Annual Net Internal Migration Rate (per 10,000 residents)
Eastern Ozarks Region	73,432	74,920	1,488	2.02%	10.1
Missouri	5,595,211	6,092,320	497,109	8.9%	1.8

Table 4: 2016 Population Age Dynamics Source: Business Analyst Online, ESRI, 2017							
	0 to 14	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
Eastern Ozarks Region	17.5%	11.3%	10.7%	10.7%	13.0%	14.8%	22.1%
Missouri	19.0%	13.5%	13.2%	12.1%	13.4%	13.2%	15.6%

The fact that people are moving into the region suggests that it is a desirable place for people to live. The challenge is to provide livelihoods for these people. While Social Security and medical benefits may secure the lifestyle of many seniors, younger people need to be able to earn a decent living. While selling crafts alone is not likely to be sufficient to earn a living income, it can be an important supplement to other sources of income.

An important human resource for the region is the presence of many highly-skilled and creative artisans. In the six workshops held in the region, more than 70 artisans participated as well as 30 community residents in support of their artistic neighbors. This is only the tip of the iceberg as conversations with artisans suggest that there are many other craftspeople that did not attend these workshops, yet may want to participate in this initiative as it progresses.

Report Overview

The remainder of this report explains the feasibility study findings. Section 2 presents case studies of three arts-based projects in Paducah, KY; Helena, AR; and Rushville, IL. Section three provides a listing of existing artistic assets found in the region. The critical needs of artisans are addressed in Section 4 and the market demand from external customers for handmade Ozark arts and crafts in Section 5. Section 6 recommends an approach to facilitate international exporting of Ozark arts and crafts and the support of community members is considered in Section 7.

Section 8 develops recommendations for the design and implementation of the Artisan Innovation Hub, while financial projections are presented in Section 9. Section 10 estimates the economic impact that this project would have on the regional economy. Finally, we apply the Delta Regional Authority's Small Business and Entrepreneurship Policy Framework to the project to clearly identify how this project supports artisan entrepreneurs in Section 11, and finish with a summary and conclusion in Section 12.

Section 2: Case Studies

There is a national movement toward creative placemaking, the use of the arts, culture, and creativity to improve the quality of life in a community. Three communities that are using arts to drive community improvement were examined. Southeast Missouri State University staff visited the two sites, Paducah, KY, and Rushville, IL, and Ozark Vitality staff visited the community of Helena, AR. The case studies provide valuable insights into programming options, start-up financing, sustaining operations, community involvement, and partnership development.

[Paducah, Kentucky \(population 25,000\)](#)

Contact: www.paducah.travel

Programming and Cultural Assets

- Art a'la Cart: there is a triangular park in the downtown and several artists in the park were making art on their mobile carts and talking with visitors. In order to participate, artists are required to be creating art, not merely selling it. One artist explained that he sees himself as an ambassador for the downtown, advising visitors on what to see, where to eat, and answering their questions.
- The Coca-Cola building is an art Deco building constructed in 1939 and beautifully renovated. A premier hang-out location in Paducah with a coffee shop, pizzeria, ice cream store, cooperative selling local art, classes in art and video, community space, and more.
- The annual Quilt Show has more than 30,000 visitors and an economic impact estimated at \$30 million each year.

- The Paducah School of Art and Design is another beautiful renovation of a historic building (former factory) . Courses in many art forms are offered. There is partnership between the West Kentucky Community and Technical College and the City of Paducah.
- An Arts Walk is offered the third Thursday of each month; galleries are open with artists present to show and discuss their work.
- Meet the Artists is an even larger event on the third Thursday of June in which 50 or more artists set up exhibits and demonstrations at and around city hall.
- Paducah was recognized as a UNESCO Creative City of Crafts and Folk Art, one of the few American cities to receive this designation. In September 2017, Paducah hosted a Creative Cities conference with participants from UNESCO Creative Cities all over the world.
- A makerspace for the school is being developed. The school received a \$3-4 million grant for the Paducah Innovation Hub to design and implement a workforce development program that prepares students for high-tech careers in healthcare, IT, cybersecurity, engineering technology, and logistics. They will soon open a makerspace as the focal point of the project.

Keys to Success

- The effort in Paducah had wide community support. Rosemarie Steele, president of the Paducah Arts Alliance and others from the 1987 Paducah Leadership class got the ball rolling. They envisioned what the downtown could look like in 20 years with arts and culture at the forefront. They launched several historic preservation projects in the downtown with state support, including plans for the National Quilting Museum.
- The leadership was very intentional about its marketing. They hired a consulting firm to help them do an inventory of Paducah assets. They identified their audiences (primarily in Chicago and St. Louis) and developed their branding based on their assets. Rosemarie was director of the Convention and Visitors Bureau (CVB) at that time and very instrumental in the process.
- The organizations in Paducah work well together. For example, an agreement was made that the CVB would market to tourists (outside the community) while Main Street would market to local residents. Close working relationships also were demonstrated during the visit.
- The Arts Relocation program garnered national media attention spurring other efforts. Under the program, artists could purchase properties in Lower Town inexpensively and take advantage of innovative financing programs through the Paducah Bank for renovation. Rosemarie said that it was easy to get artists to come because the community was already arts-friendly and they wanted to be part of an enclave of artists.
- The arts in Paducah focus on folk and heritage arts, but Rosemarie believes that folk art influences modern art. For example, some quilters are now making very abstract quilts, almost like an abstract painting on fiber. Paducah also has demonstrations by artists and hands-on experiences for visitors. Now, visitors want the experience, not just a purchase of art. They want a story to tell as they display their newly purchased artwork.
- Local philanthropy has also been important. For example, Luther Carson, who founded the Coca Cola bottling company in Paducah, funded the construction of a state-of-the-art performing arts center, The Carson Center is where Paducah Symphony Orchestra and many touring artists perform there.

- The city through Melinda Winchester, Downtown Development Specialist, is aggressive in assisting downtown business owners who want to preserve and renovate their buildings. The city helps the owners apply for historic tax credits and assists with tax- incremental finance (TIF) fund

THRIVE in Helena, AR (population 6,300)

Contact: info@thrivecenter.org

The THRIVE concept developed in 2007 offering affordable strategic planning and marketing services to local small businesses and non-profits. Small business incubator business planning classes and one- on-one consulting, branding and design services are offered. Monthly downtown celebrations provide a marketplace for local merchants, artisans, and musicians leveraging the cultural assets of the region towards downtown investments and rejuvenation of community pride.

Mission/Focus Areas

- Lowering barriers to success for individuals and organizations by increasing business knowledge and skills, providing marketing materials and providing strategic resources
- Fostering innovation through education of principles and design and providing space in which residents can gather to generate innovative solutions
- Increase quality of life and place by identifying and facilitating development of new initiatives and increasing services and experiences
- THRIVE designs opportunity in impoverished regions of rural America to increase economic mobility and decrease the rural brain drain.
- Building community through leadership and engagement opportunities along with interaction between residents

The Facility

- Design Studio
- Gallery
- THRIVE centers
 - Entrepreneur offices
 - Local artist studios
 - Woodshop/metal shop

Support Provided to Artisans

- Place for artists to connect, e.g., open community workshops, open write night
- Designer-In-Residence Program
- Collaborative product design in shared makerspace
- Opportunity to exhibit art

Governance Model

- 501(c)3 Non-profit design organization
- Partner with community to create quality-of-life boosting projects that are partially funded by an in-house graphic design firm

- Have supportive board of diverse artist educators and community leaders

Ongoing Revenue Streams

- Partially grant funded
- Donations from community members and foundations can be made from \$50,000 to \$1
- Partially funded through in-house graphic design firm

The HUB Arts and Cultural Center, Rushville, IL (pop 2,000)

Contact: www.thehubart.com, <https://www.facebook.com/thehubart/>

The HUB Arts and Cultural Center has a mission to create and maintain a connection between the arts, rural culture, and local communities through exhibitions and educational experiences. The idea of the Hub started in October 2015 and the start-up has already made significant progress.

Mission/Focus Areas

- Education and Culture: Have programs/workshops for kids, teenagers, Man Made (handcrafted, primarily for men), Cocktails and Color (wine and painting event). summer camp for K-8, workshops teach painting, leather-tooling, jewelry-making, and other arts
- Sales of locally made art - There is a small retail space in their new building

How They Got Started

- Conducted a needs assessment in Fall 2015, obtained non-profit 501(c) (3) status in spring 2016, started programming in spring and summer 2016
- Received anonymous gift of \$120,000 to purchase building in downtown Rushville in September 2016
- Received grant from local foundation (Tracy Foundation) to cover operating expenses for the first year and expect to further develop that relationship

The Facility

- 3,500 sq. ft. total with gallery space, small retail space, workshop areas, and reading area with fireplace.
- Not providing maker or studio space as they believe artists do not need or will not pay for such space

Support Provided to Artisans

- Place for artists to connect, e.g., open studio nights, open write night
- Retail space although not the focus
- Opportunity to lead workshops and to participate in workshops
- Opportunity to exhibit art

Governance Model

- Operated by local 501(c)(3) non-profit
- Local art teacher, Erin Eveland, became the new Director in May 2017
- Have supportive board of diverse artists and appreciators

Ongoing Revenue Streams

- Grant for operating funds – does not include Director salary
- Potential for expanded support from local foundation
- Fund-raising is expected to intensify when Ms. Eveland starts
- Friends of the Hub – Artists and others can become friends, receive discount on workshops, and other benefits

Case Study Common Themes

Although these communities vary widely in their approaches, a few themes emerge that are common to all:

1. First, it is crucial to build strong community support and collaboration with local groups. These arts-focused organizations rely on contributions from local residents, businesses, and government and are intentional about building trust and good relationships with local residents. For example, Paducah and Rushville each received sizeable donations from local residents who wanted to support the mission of arts-focused community development.
2. Second, several revenue streams are necessary to start and maintain the arts projects. For example, THRIVE has a creative source of fee-based revenue by providing design and marketing services to local businesses at an affordable cost.
3. Third, marketing should be of high quality and focus on the uniqueness of the community. For example, Paducah hired a professional marketing firm to identify cultural assets as a basis for their marketing campaign.

Section 3: Mapping of Artistic Assets in the Eastern Ozarks

Over the years, many arts and crafts-related organizations and businesses have taken root in the region. These organizations offer opportunities for artisans to learn more about their craft and to network with other artisans. When considering a regional system of support for artisans, it is important to acknowledge the existing organizations that facilitate the creation and sales of art in the region. As Table 5 indicates, these include blacksmithing shops, pottery classes, a makerspace for heritage wood-working (without electricity), a dance and music studio for youth, community theatres, art galleries, and open studios. Our listing may be incomplete, but is suggestive of the active art and craft scene in the region.

Table 5 – Mapping of Cultural Assets (Arkansas)

Asset Name	Location
<p>Arkansas State – The Garage Although designed for many types of entrepreneurs, the Garage, located just outside the region in downtown Jonesboro, is a valuable resource for artisans. The Garage is a maker’s space/co-work space. With accommodations such as 3D printers, virtual desktops, ample workspace, meeting/conference rooms and a coffee bar, The Garage can be an asset to entrepreneurs and innovators of all sizes.</p>	Downtown Jonesboro Craighead County, AR
<p>Downtown Playhouse The Downtown Playhouse offer a series of full- scale stage productions by the resident acting troupe, Second Act Productions. It also offers a concert series and a Lecture series which are sprinkled throughout the year.</p>	Downtown Pocahontas Randolph County, AR
<p>Arcs & Sparks – Blacksmith Arcs & Sparks is a metal fabrication and metal design company in Pocahontas. Arcs & Sparks also trains new artists in the use of sophisticated equipment under the tutelage of metal artist Wendell Hogan.</p>	Pocahontas Randolph County, AR
<p>Marilyn's Clogging Co. Marilyn's Clogging offers a rich array of music and dance programs for youth, including ballet, jazz dance, and clogging; music lessons for violin, guitar, and drums; and taekwondo.</p>	Downtown Pocahontas Randolph County, AR
<p>Spring River Art Guild Spring River Art Guild is a regional gallery staffed by volunteers. The artists, over 20 currently are from Northeast Arkansas and Southeast Missouri representing eclectic mix of mediums, styles, and personalities. Many of those represented by the Guild are award-winning artists. It also offers workshop for artisans.</p>	Downtown Hardy Sharp County, AR

Table 5 – Mapping of Cultural Assets (Missouri)

<p>Heritage Homestead and Tom Kennon Blacksmith Shop The Tom Kennon Blacksmith Shop is part of the Heritage Homestead, one block south of the Courthouse in downtown Doniphan. By visiting the homestead, the general public learns about the history of blacksmithing. Classes are offered in the spring and fall to teach the art of blacksmithing to those interested in learning the craft.</p>	Doniphan Ripley County, MO
<p>Alley Spring and Mill This National Park Service site, located six miles west of Eminence, hosts various arts and cultural events such as evening folklore activities, Ozark heritage demonstrations, food, dancing, bluegrass, and folk music.</p>	Shannon County, MO
<p>Echo Bluff State Park This one-year old state park between Eminence and Salem, MO represents a state and federal investment of over \$60 million and supports local artisans by offering local crafts in their general store, the Sinkin' Creek Mercantile. The park's restaurant, the Creekside Grill features local foods and Missouri wines and microbrews.</p>	Shannon County, MO

<p>National Park Service Heritage Shop and Woodworking Makerspace The makerspace is supported by the National Park Service with volunteer teachers and mentors, including archaeologist and state recognized folklorist Dr. James Price, to those interested in learning the craft of heritage woodworking (without electric tools). The goal is to keep this skilled craft alive in the Ozarks.</p>	<p>Van Buren Carter County, MO</p>
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During the course of this study Cherokee Village, AR in Sharp County received a Delta Regional Authority creative peacemaking grant of \$20,000 to develop the Spring River Innovation Hub. Plans for the Hub include a space for high-speed internet access, business and marketing consultations for perspective entrepreneurs, and other services related to starting and managing a business. The Hub received private donations in the amount of \$12,000 towards the construction refit of the space, and additional matching funds of \$20,000 was required to receive the grant. Several projects are currently being implemented in Cherokee Village including bimonthly "Pop Up Shops" in the town square, and a rebranding regional tourism effort entitled "Spring River Country".

In creating the Artisan Innovation Hub, an important consideration should be how to create an effective support network that includes these existing organizations. The goal is not to replace any of the above groups, but rather to supplement them and to link them in a way that creates synergy. Ideally, artisans in the future should be able to plug into the network through any of these organizations. Each organization would be able to refer artisans to the resource that can most effectively meet their needs.

Section 4: Findings of the Artisan Survey

More than 70 artisans participated in the series of six workshops held in the region. A key goal of the workshop was to identify the needs of artisans and gauge their interest in participating in an Artisan Innovation Hub. A survey was used to record their views and personal interviews were conducted with others so they could elaborate on their current art and craft work and identify in more detail what assistance would be helpful to them.

The categories identified most often by artisans were 1) Drawing, Painting, and Visual Arts with 20 artisans and 2) Fiber Arts with 24 artisans. However, there is a wide range of crafts and arts produced suggesting that the sales and marketing of Ozark handmade items would be

able to offer a wide assortment of items. Among the more unusual crafts was a fabric artisan who spins and weaves clothes growing her own plants to use for natural dyes. There are also several blacksmiths and makers of violins and other stringed instruments (luthiers).

As Figure 2 indicates, there is a wide variation in the crafts represented at the workshops. Furthermore, many artisans created multiple types of crafts (for example, fiber and visual art). An initial question on the survey distributed during the workshops inquired as to which arts and crafts the artisan was creating. The word cloud in Figure 3 on the following page identifies each artisan participant's response to that question.

The survey results paint a portrait of the artisans in the region who demonstrated an interest in the project. They are primarily female (two-thirds) and relatively well educated (25% have graduate degrees). The age distribution is shown in Appendix B. They are the boomer generation (more than 60% are aged 55 and above). An important concern for

many artisans at the workshops was how to pass along their skills to the next generation. Artisans want these traditional Ozark craft skills that had been passed to them by their parents and grandparents to survive and continue to produce unique art in the future.

Few artisans make a living solely from their art or craft. In fact, earnings from creative work

were reported as being low. Sixty percent of artisans earn less than 10% of total income from their creative work. However, a modest boost in income for many artisans would enable them to live more comfortable lives and provide better opportunities for their families.

Furthermore, the regional effect of such an increase would be substantial as demonstrated in the Economic Impact section (Section 10) of this report.

Artisans were asked about their experience in selling their creative work. There was a mixed view on this issue with approximately 40% reporting that it is difficult to sell their work and nearly the same percentage reporting that it is easy.

Figure 2: Crafts Produced by Surveyed Artisans

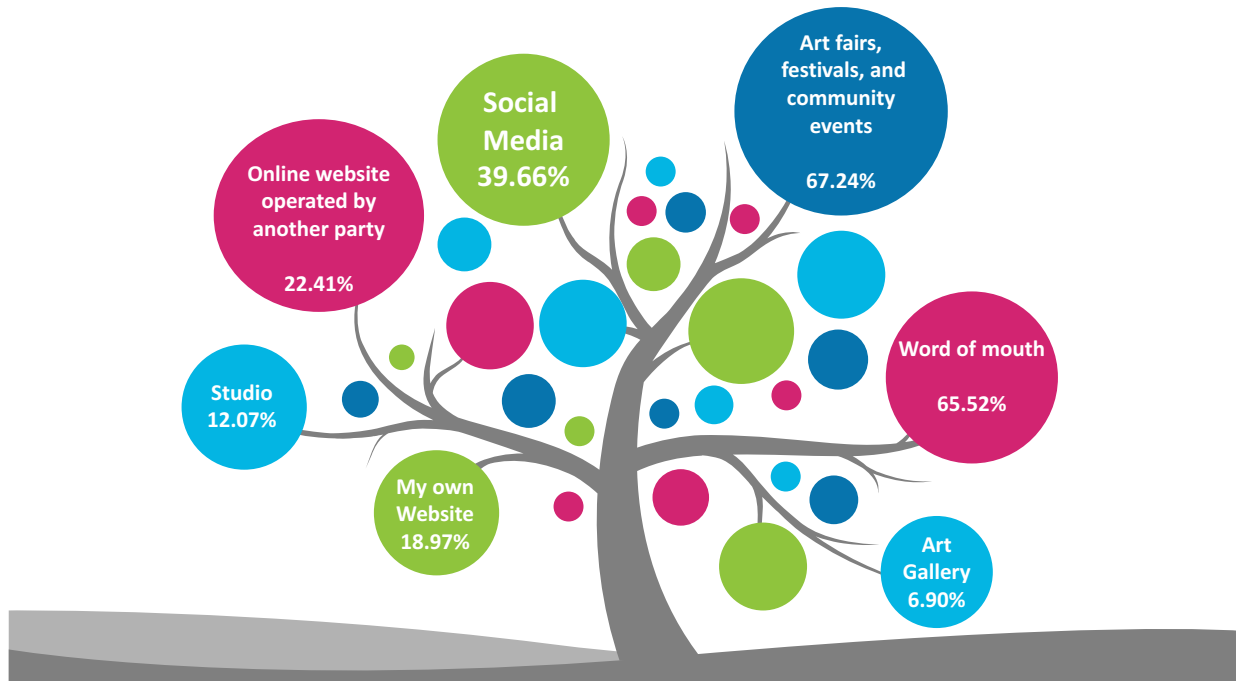
<p><u>Craft Food, beverage or household items:</u> Some artisans produce practical, everyday items such as such as food and household items</p>	<p><u>Wood products</u> Many artisans produce wood products musical instruments, canoes, and statues</p>
<p><u>Clay pottery, glass or metalwork</u> Several artisans produce crafts in the form of clay, of glass and metal</p>	<p><u>Fiber or fabric item</u> Most artisans noted a craft in the form fiber or fabric</p>
<p><u>Drawing, painting, or mixed media</u> The next popular handmade item was in the form of a drawing, painting, or other visual art</p>	

Figure 3: Artisan Survey “Other” Craft Items



Figure 4 identifies the places where artisans report marketing their creative work. The most common marketing approaches are word of mouth and art fairs, festivals, and community events. In fact, these approaches are used by approximately two-thirds of respondents. There is less use of online platforms to sell their arts and crafts. Slightly more than 20% report utilizing on online website operated by another party, such as Etsy. Somewhat surprisingly, 11 artisans, nearly 20%, report having their own website. It is unclear whether the websites are generating the traffic that the artisans expected.

Figure 4: Marketing Locations



Many artisans expressed their interest in selling online, while admitting they do not have the technical expertise to do so. This desire for online marketing is also indicated by the high percentage, nearly 40%, who report using social media to market their products. Most use Facebook since it is simple to set up, while actual sales platforms are uncommon. Providing an effective online sales and marketing presence with a distinctive Ozark brand would be a valuable contribution by the Artisan Innovation Hub.

One aspect of support the Artisan Innovation Hub is considering is a shared makerspace. However, the survey results do not support this portion of the project, at least initially. Almost all artisans report that they have the physical space to do their creative work. Most (70%) report that they have access to tools and supplies, while 30% say that they have “some things, but not all.”

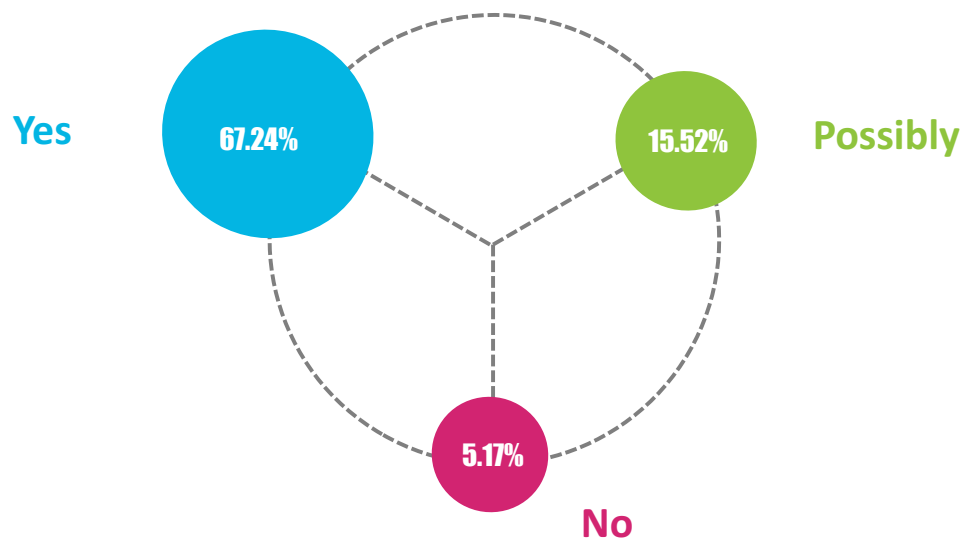
The primary service that artisans want is help with marketing and sales. They are also very interested in receiving technical assistance for their business. Artisans participating in the hub would benefit from basic business planning, the creation of financial projects, marketing plans, and establishing a legal structure. This technical assistance could be provided through a variety of sources. One such source could be through the local Small Business and Technology Development Center (SBTDC). SBTDC services are provided through business counselors located at both Southeast Missouri State University and the University of Missouri Extension.

- Forty five percent (45%) of artisans are willing to pay a monthly fee to join the Artisan hub and 45% would consider it.
- The dominant share of artisans (70%) will pay \$20 or less each month.

- Those who are willing to sell their products through the hub, the largest share (40%) would be willing to pay a commission of 10-20%.

Two-thirds of artisans want to increase their income. This is an important finding in regards to the supply of artisan products. For the Artisan Innovation Hub to succeed, there must be an on-going flow of product. The excitement among the participating artisans was palpable at the workshops. Several reported that they never realized that there could be support for them and were very excited at the prospect. This bodes well for a sales and marketing focus of the Artisan Innovation Hub.

Figure 5: Interest in Increasing Income



However, even among those wanting to increase their sales, the personal interviews and artisan workshops revealed that many were not interested in making their creative work into a full-time job. The Artisan Innovation Hub must consider that many artisans are not prepared or wanting to significantly expand their production.

On the positive side, there are many artisans who did not participate in the workshops. One artisan at the workshop mentioned that she knew 5-10 more artisans who would likely be interested in expanded sales and marketing, but they did not attend. There likely will be more interest and expansion of artisans once the initial sales and marketing campaign proves its value. This also reflects the culture of the region where the show-me attitude prevails.

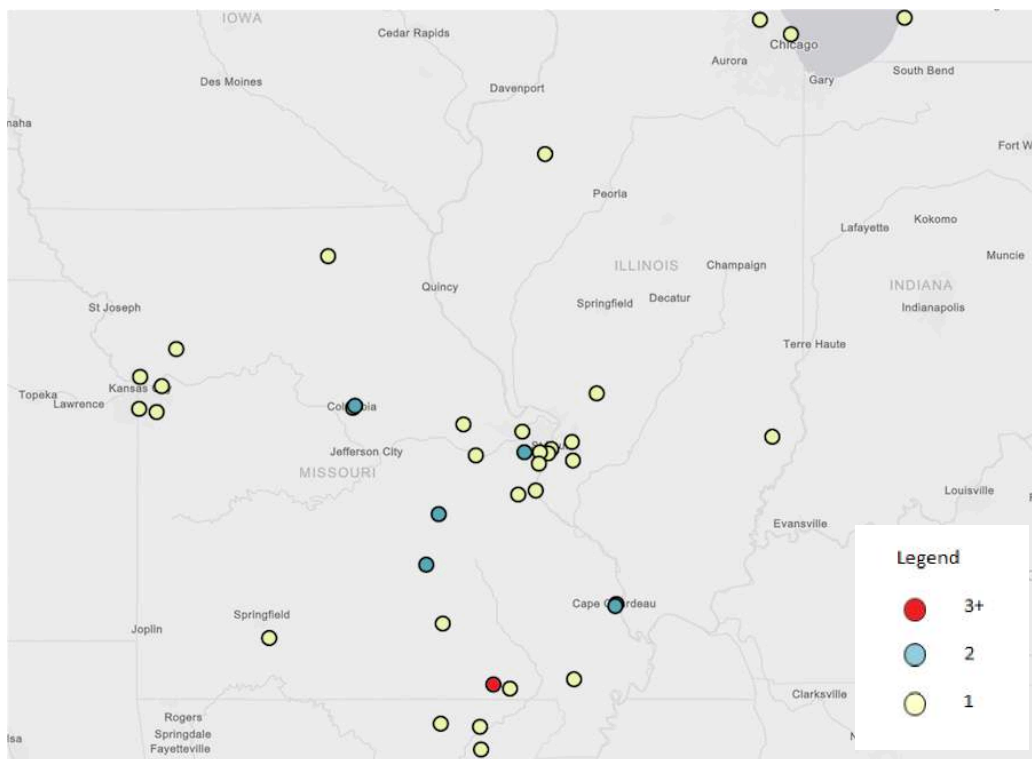
Section 5: Market Demand for Handmade Arts and Crafts

An important question for the financial viability of the Artisan Innovation Hub is whether there is sufficient demand for the art and crafts created. Initially at least, the prime market would be those who visit the area and have an affinity for the Ozark brand. To explore that question, we surveyed a group that is important to the Ozark economy, those who canoe, kayak, or raft the rivers in the region.

The population source was membership in the Facebook group entitled Current River, Jacks Fork & Eleven Point Rivers. To give an indication of the interest in recreation on the rivers of the eastern Ozarks, this Facebook group has more than 37,500 members as of September 20, 2017. Two posts were placed on the page inviting members to complete the questionnaire see Appendix B. For ease of reference, this group is referenced as River Enthusiasts throughout this study.

A total of 45 responses to the survey was received from River Enthusiasts. Figure 6 shows the location of those responding to the survey. It is clear that most respondents live outside of the region. In fact, there are heavy concentrations of respondents from St. Louis and Kansas City. It is expected that the demographics of the River Enthusiasts would be different from those who live in the eastern Ozark region, and the survey results confirm this.

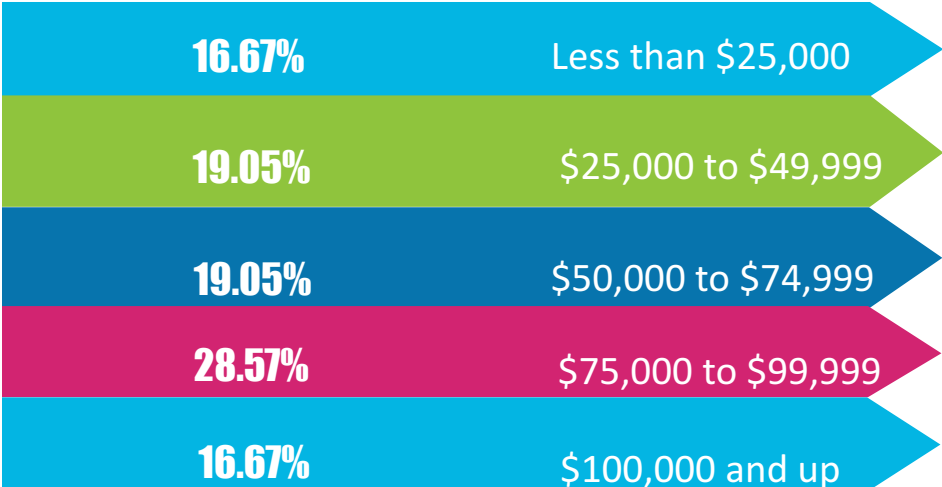
Figure 6: River Enthusiasts Home Locations



The demographics from the survey show that the River Enthusiasts are generally younger and wealthier than those residing in the region. The median age in the survey sample was in the range of 45 to 54 with a significant number of respondents in their 30s.

The River Enthusiasts, as a whole, have incomes that are solidly middle class. As Figure 7 indicates, more than 45% have annual household incomes greater than \$75,000. This suggests that this group has the financial capacity to purchase handmade goods from the eastern Ozarks.

Figure 7: What is your approximate annual household income?



When asked about their most recent purchase of arts or crafts, 60% indicated the purchase was a gift for themselves or others, while approximately 30% indicated that they purchased tools or supplies to make crafts themselves. It is interesting that nearly one-third of the River Enthusiasts are actively making crafts themselves. This general interest in arts and crafts suggest they are likely to be interested in purchasing unique items that have been made in the Ozarks.

On their most recent purchase of art or crafts, the median expenditure was in the range of \$21-\$40. This is in the range of the average purchase on the online platform Etsy where the average purchase is approximately \$25 (“Starting an Etsy Shop”). The findings suggest here is a more limited market for more expensive items with 25% spending more than \$40 and 11% spending more than \$75.

The River Enthusiasts are also active online shoppers. Approximately 37% report that they purchased their last craft item online. Gift shops, retail stores, and craft festivals are other popular places to make a craft purchase.

Figure 8: Where did you purchase your most recent arts or craft item?



Food items are the most frequently purchased by the River Enthusiasts at 46% while arts and prints and clothing are purchased by 35%. As Table 6 shows, there are many items that appeal to the River Enthusiasts, so it is likely they will purchase a broad array of handmade goods.

Table 6: Ozark Vitality Artisan Hub Feasibility Study – Survey	
What types of arts and crafts items do you purchase most frequently?	
Answer Choices	Responses
Arts and prints	34.88%
Clothing	34.88%
Fiber items, such as quilts	9.30%
Food	46.51%
Housewares	20.93%
Jewelry	37.21%
Paper goods	9.30%
Supplies and patterns	16.28%
Toys, dolls, and miniatures	11.63%
Vintage	18.60%
Other, please specify	9.30%

In fact, 40% of the River Enthusiasts have purchased handmade items from the Ozarks. Table 6 shows items they have purchased. While many are inexpensive, comparable to the average Etsy purchase of \$25, there are some that are costlier, including a quilt, furniture, handmade canoe paddle, and home décor items. This suggests that there may be several price tiers at which products could be marketed and sold by the Artisan Innovation Hub.

Figure 9: Items Recently Purchased in the Ozarks



Finally, the River Enthusiasts are frequent visitors to the Ozark region. Nearly 60% report that they visit multiple times most years. This suggests this tourist group is a critical market segment for sales from the Artisan Innovation Hub. It is likely that word of mouth from this group would bring additional sales from nearby cities, especially St. Louis and Kansas City.

Table 7: Ozark Vitality Artisan Hub Feasibility Study – Survey	
How often do you visit Eastern Ozark rivers, such as the Current River?	
Answer Choices	Responses
Not at all	0.00%
Visited once or twice in total	4.65%
Once every year	23.26%
Multiple times most years	58.14%
I live near these beautiful rivers	13.95%

Another consideration in evaluating the market demand for artisan products is by a review of the retail market trends of locals. According to ESRI tapestry segmentation data, 46% of residents in the six-county region are considered rooted rural (ESRI, 2017). The rooted rural designation means that residents have certain traditional and cultural values that provide a good consumer market for heritage artisan products. When shopping, people in this category are interested in American-made, and one could reasonably assume, Ozark-made. Heritage and history are important to rooted rural residents, and this is shown through the support of the project identified by community members that completed the surveys at regional workshops.

Section 6: Exporting Ozark Arts and Crafts

Export Policy Considerations

The Ozark Artisan Innovation Hub seeks to help local artisans and craftspeople earn a better living through the creation of shared makerspaces and marketing and distribution assistance of Ozark artisan products. Expanding sales of Ozark artisan products to markets outside of the United States is a possible next step in assisting artisans achieve revenue growth. The Ozark Artisan Innovation Hub is exploring international market opportunities and developing business relationships with distributors located outside of the United States to meet the goal of expanding sales in global markets. The Innovation Hub would need to closely adhere to the applicable export laws, rules and regulations of both the U.S. government and the country where business is being transacted.

Part I: Concept Summary

The mission of the Innovation Hub is to assist artisans create a better place to live, work and play in the Ozarks. A resource for artisans, craftspeople and tourists, the Innovation Hub focuses on rural communities in the eastern Ozarks of Missouri and Arkansas.

The Innovation Hub will help create sustainable economic growth for artisans in small communities through regional collaboration and partnering with neighboring communities to create an environment where heritage art is preserved, appreciated, and enjoyed by consumers interested in the eastern Ozarks. The key project focus is on creative place-making: using the power of art, culture and creativity to ignite positive change and spur economic growth.

Products

Key artisan products available to market on a global scale include:

Drawings, paintings, or mixed media – Many artisans from the eastern Ozarks identify themselves as visual artists focused on drawings or paintings. Primary forms of this type of art include:

- Chalk
- Charcoal
- Pastel
- Pen/Ink
- Pencil
- Acrylic paints
- Oil paints

Fiber or fabric – Fiber and fabric encompass the use of textiles to create art. Common mediums for this type of art include:

- Natural fibers
- Synthetic fibers
- Quilting
- Embroidery
- Weaving
- Spinning
- Knitting/Crochet
- Macrame
- Leather Crafts

Clay, pottery, or glass – Artisans in this category use polymers, pottery or ceramic clays, wax, glass, other hardening agent. Typical art products in this class include:

- Clay-based sculptures
- Ceramics
- Pottery bowls and other dishware
- Ornaments
- Jewelry
- Blown glass products

Wood products – Due to the large forest and woods products industry cluster in the region, wood crafts are plentiful in the eastern Ozarks. The primary wood art products include:

- Stringed instruments
- Canoes/Boats/Paddles
- Signs
- Figurines

Craft food, beverage, or household items – While exporting craft foods presents a different challenge and additional regulatory consideration, some of the household items in this category could be easily transported to international markets. Some products in this category include:

- Boxes
- Furniture

Metalworks/Blacksmithing – Metal craft and blacksmithing require a highly technical skilled artisan to produce the craft. While not as plentiful as other arts, learning the skill or trade is still

popular in the region as evidenced by local classes offered in several different communities. Some of the products created by metal or blacksmiths include:

- Signs
- Sculptures
- Jewelry
- Tools
- Knives/Weaponry

- Jams/Jellies
- Salsas
- Artisan Cheeses
- Wine/Craft Beer/Spirits
- Soaps/Lotions
- Dried fruits
- Local Meats

Target Customers

Target customers for international exporting of the Ozark Artisan Innovation Hub member artisan products are retailers of souvenirs and keepsakes in other countries for gift-giving or special occasions. An opportunity for the Hub to assist its member artisans with reaching broader markets and potential customers is to attend trade shows focused on souvenirs and small gifts for retail stores.

One such example is to attend the International Gift Exposition in the Smokies (IGES) was founded in 2001 as an annual gift show in the beautiful Smoky Mountains of Pigeon Forge and Sevierville, TN. The exposition is held in late Fall and draws buyers from specialty stores across the U.S., the Caribbean, and Canada. The show features more than 1,200 booths of specialty items for souvenirs, coastal gifts, children's toys & plush, resort apparel and Made in the USA collectibles & keepsakes for buyers of retail stores.

Another opportunity to reach the international market is to connect with the Missouri Department of Economic Development's International Trade & Investment Office. MO DED has staff posted at various

locations across the globe to assist Missouri businesses with exportation of their products. A program of the International Trade & Investment Office is the Show-Me State Approved program. Products receiving this designation indicate the product is top notch quality and primed for the global market. Working with the State of Missouri to gain this designation for products of the Ozark Innovation Hub is suggested so that products have a better chance of being picked up by distributors of souvenir and gift giving products.

The State of Arkansas has a similar department, the Arkansas Economic Development Commission's International Business division. Contact with the Arkansas office to determine their available support should be explored.

Operations

Ozark Artisan Innovation Hub could consist of the team of Ozark Vitality, volunteers interested in preserving heritage art in the eastern Ozarks, and member artisans. Art could be produced by member artisans and distributed through one of the methods described in the "Sales Process" section of this plan.

Key functions of the Innovation Hub may include:

- Sales, Marketing & Customer Service
- Community Outreach/Education
- Product Acquisition and Merchandising

Online order processing and a team of dedicated staff and volunteers would need to ensure customer orders receive quality packaging and timely shipment. Product would be shipped to customers according to their specifications using standard freight services.

Sales Process

Ozark Artisan Innovation Hub could assist artisans in the eastern Ozarks of Missouri with pricing, marketing, sales and distribution services to help them reach untapped markets on a global scale. The following sales channels are recommended to provide global sales support:

- Trade shows – see "Target Customers" section of the export plan. Reaching retailers in the wholesale market could be achieved by attending various trade shows such as the International Gift Exposition in the Smokies (IEGS). Another exposition opportunity that would reach a larger international market is the ASD Market Week show in Las Vegas, NV. Over 90 countries and 45,000 buyers are represented at ASD. Both the IEGS and ASD trade shows are within the Emerald Expositions umbrella, the largest operator of B2B trade shows in the U.S.
- Online e-commerce site – managed by the Ozark Artisan Innovation Hub, an e-commerce site could be established to assist not only local buyers with purchasing heritage crafts, but also international buyers who have potentially visited the eastern Ozarks and would like memorabilia from the area or those interested in the Ozarks. Targeted social media promotion of arts and the e-commerce site is one way to increase brand awareness and interest. Customization of arts and crafts products, a "made to order" concept could also be promoted to contribute to the uniqueness of the Ozarks art brand.

- Using an existing online platform, such as Etsy, would be another sales channel for distributing to international markets. Etsy is a familiar name with many craft buyers and would be a good opportunity to capitalize on a platform that is established with a solid following. An Ozark Artisan Innovation Hub “store” could be established on Etsy with sales managed by the Hub’s sales staff.

Industry Structure, Competition and Demand

Demand for international exports of heritage artisan products continues to increase with the movement of young adults interested in a simpler and minimalistic lifestyle. According to a survey from Harris Poll and Eventbrite, 78% of millennials would rather spend money on experiences versus materialistic products. It is reasonable to assume tourism to the eastern Ozarks will increase, contributing to demand for heritage art products. Also, the young adult age group will be more likely to purchase cultural art products over meaningless gifts and souvenirs based upon spending habits in this age group. Organizations and e-commerce sites that could be considered competitors include:

- Etsy, Ebay, and other mainstream e-commerce sites
- Novica
- Southern Highland
- Black Belt Treasures

Ozark Artisan Innovation Hub could differentiate itself from competition based upon:

- **Ozarks Branding** – Tourists and others with interest in the Ozark Mountain Region of Missouri and Arkansas would be interested in items “Made in the Ozarks”.
- **Artisan Biographies** – Information on the artists who produce the products would provide a personal touch to a branded e-commerce site that other mainstream sites do not offer.
- **Technology Support** – Local artisans would benefit from having access to direct support in photographing their art, posting their listings, and other technology-related assistance. In addition, customers would have access to live assistance should they experience problems purchasing items.
- **Unique and Exclusive Product Lines** – Art curated by a local team who live in the Ozarks and have access to the local artists.
- **Professional/Polished** – An e-commerce site branded as the Ozark Artisan Innovation Hub, professionally managed by an on-site team and user-friendly to ensure a topnotch customer service experience.
- **Timeliness of Deliveries** – The Innovation Hub team should have control of and ensure timely delivery of any product ordered.

[Part II: International Market Expansion](#)

The Ozark Artisan Innovation Hub recognizes that large consumer populations exist outside of the United States. Several emerging market trends provide incentive for the company to pursue international market expansion.

Key trends include:

- **Growth of the new emerging middle class** - the growing ranks of the middle class in up-and-coming parts of the world mean that the old rules of the global economy no longer apply. To grow the business internationally in the future, there may be an opportunity to reach out and attract these new customers.
- **Increasing demand for quality over price** – young professionals, who have an increasing interest in culture and the arts, are more concerned about quality over price.
- **Growth rates in emerging economies are outpacing that of developed economies** - 2102 Growth Rates: Emerging Economies: 5.75%; Developed Economies: 1.5%.

Target Market Identification and Evaluation

A two-phase approach for entry into the international marketplace is suggested, focused on the seven countries with highest market potential for heritage art products. Those countries include:

- Mexico
- Canada
- China
- Republic of Korea
- Japan

Illustrative Phased Approach

Phase One could involve a direct export strategy to Mexico and Canada. In-country identification of distribution/representation partners will begin in the first quarter of 2018. Resources available to assist with market entry include MO Department of Economic Development Office of International Trade & Investment, MO Department of Agriculture and MO Small Business & Technology Development Centers.

Phase Two could include further research of potential product offerings in Southeast Asia and development of country-specific market entry strategies, and could begin in tandem with Phase I. In addition to the resources utilized in Phase I, Ozark Artisan Innovation Hub could utilize the U.S. Department of Commerce as appropriate.

Product Selection

Ozark Artisan Innovation Hub should select a collection of specialty products in each product category to initially test demand in the international marketplace.

Pricing & Terms

Payment terms and conditions should be negotiated with each individual international distributor/customer and will be set based upon analysis of customer, market and transaction risks.

Internal Organization and Procedures

The Ozark Artisan Innovation Hub should ensure that the appropriate export policies and procedures are in place as requirements are identified.

Marketing Efforts

To generate international sales leads and inquiries, Ozark Artisan Innovation Hub should reach out to international sales partners through:

- Missouri and Arkansas Trade Offices
- Tradeshow participation
- E-commerce and other online sites

Ozark Artisan Innovation Hub should take full advantage of funding available through the Missouri Department of Economic Development's MO STEP UP Program and the USDA's Branded Program.

Section 7: Stakeholder Support of the Project

During the feasibility study, preliminary evidence of the extent to which community members and leaders in the region support the concept of an Artisan Innovation Hub was gathered. First, at each of the six workshops, one or more local government officials participated including city officials, county commissioners, and staff from U.S. Congressman Jason Smith's office. This suggests that the public sector has an interest in the success of the Artisan Innovation Hub.

Second, participants of the workshops who were not artisans but community members were asked to complete a brief survey. Responses were received from 30 community members representing a range of interests including the public sector, the local chamber of commerce, private businesses, and civic groups.

The community stakeholders are strongly in support of a hub, with all agreeing that it would improve sales of locally-made goods. A remarkable 85% reported that they believed the Artisan Innovation Hub was worth the investment. All of them indicated that they are willing to shop at the hub.

Table 8 shows the active roles that community members are willing to take with the Artisan Innovation Hub. About 40% of the community stakeholders indicated interest in becoming members, supporters, and friends of the hub. 75% reported that they would refer artisans to the hub. It seems likely that Ozark Vitality can build community support for the project because of the need for economic revitalization in the region and due to the enthusiasm of artisans and other community stakeholders.

Table 8: Ozark Vitality Artisan Hub Feasibility Study – Survey

Please indicate your potential level of participation in the Artisan Hub (check all that apply).		
Answer Choices	Responses	
I am interested in becoming a member in the Artisan Hub	19.23%	5
I am very likely to use services at the Artisan Hub, but not become a member	30.77%	8
I am somewhat likely to use services at the Artisan Hub, but not become a member	3.85%	1
I am a service provider (willing to provide business, financial, legal services, etc.) that is interested in providing my services to tenants of the Artisan Hub	19.23%	5
I am willing to refer artisans to the Hub	65.38%	17
I would not use the Artisan Hub	0.00%	0
I am willing to become a sponsor or friend of the Artisan Hub	38.46%	10
I am only interested in shopping at the Artisan Hub for locally made goods	34.62%	9
If you are a service provider interested in providing services, please specify services you are willing to provide below	0.00%	0

Section 8: Recommended Project Design and Implementation

The vision of the Ozark Artisan Innovation Hub, as articulated by Ozark Vitality, is to provide support services for artisans across six counties in southern Missouri and northern Arkansas. The support services include assistance with production (e.g., art and crafts training, makerspaces), assistance with marketing and sales (e.g., ecommerce platform, mobile art gallery, physical retail sites), and assistance with business functions (business counseling and training opportunities).

In their vision, there could be makerspaces, training workshops, and retail outlets located across the six counties. One county might specialize in fiber arts and have a makerspace with associated training in fiber arts. Another might specialize in local food products. There could be an Ozark Arts and Crafts trail that visitors could follow from one community to another to experience the variety of creative work done in the region. Along the trail, there might be a makerspace to experience rudimentary fiber work in one community and a demonstration of blacksmithing in another. The network will be “artisan-friendly” so that an individual artisan could visit any of the interconnected facilities and be advised as where he could find the services that fit his particular needs in bolstering his craft.

Opportunity Summary

The vision as sketched above is very creative and innovative. It would have a profound economic effect on the region and likely bring unforeseen favorable spin-off effects. The vision is also very complex because it spans a wide geographic area with potentially hundreds of participating artisans. This study identifies three opportunities that if implemented, would enable Ozark Vitality to realize their vision.

Opportunity One | Coordinated Regional Network of Support Services

Build connections among the various artist assets as listed in Mapping of Artistic Assets section of this report, including Arkansas State University – The Garage in Jonesboro; Alley Spring and Mill near Eminence, MO, Black River Beads & Pottery; Downtown Playhouse in Pocaahontas; Echo Bluff State Park; Arcs & Sparks; Arts Center of North Arkansas; National Park Service Heritage Shop and Woodworking Makerspace; Hardy Art Gallery; Marilyn’s Clogging Company; Heritage Homestead and Tom Kennon Blacksmith Shop; and Spring River Art Guild.

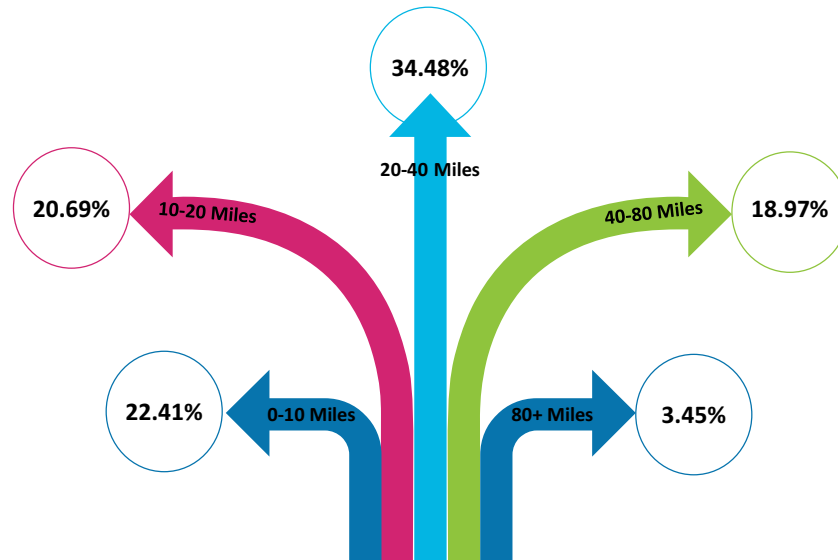
Building the network will enable artisans throughout the six-county region to obtain the assistance that they need in an “artisan-friendly” system. Many support services currently exist on the business side of developing an artisan entrepreneurial venture. The Small Business and Technology Development Centers (SBTDC) should be utilized to provide support with these services. Notably, the SBTDC in West Plains, MO located just to the west of the project area, provides a regular Craft Entrepreneurship training series. Information on the series can be located at https://missouribusiness.net/event/?program=BDP&event_id=306531.

Opportunity Two | E-commerce Platform for Sales and Marketing

Establish an e-commerce site for sales and marketing of Ozark arts and crafts. The platform should distinguish itself from other sales sites by effectively branding the Ozark name, enabling customers to feel personally connected to the artisans, carefully developing a sense of exclusivity for more expensive products, and utilizing a mobile art gallery to demonstrate the uniqueness of the arts and crafts. Along with the sales emphasis, there should be training and business counseling opportunities for artisans.

It is important to note the development of this opportunity would be greatly enhanced by the expansion of virtual connectivity options in the region. This very rural region lacks adequate digital infrastructure in a majority of the area. Lack of adequate broadband and virtual connectivity translates to a lack of awareness and cross-community participation with existing resources. Some perceived gaps in artisan support services could be met with existing resources if digital knowledge sharing could be improved. At least one location in each county should have adequate access to enable successful implementation of this project. The need for virtual connectivity is supported by the data that shows 43% of artisans are unwilling to drive more than 20 miles for amenities and support.

Figure 10: Distance Artisans are willing to travel for assistance



Opportunity Three | Expansion of Specialized Makerspaces, Training Venues, and Physical Retail Locations

As sales expand, it will be feasible to add specialized makerspaces such as in fiber arts, to boost training of artisans and encourage passing down the skills to the next generation. Furthermore, more workshops and other events will be made available to artisans and there may be sufficient demand to merit additional physical retail spaces to sell the handmade products. The Ozark Art and Crafts Trail could be established as part of this opportunity, offering tourists the opportunity to travel from one community to another learning and experiencing Ozark craft-making.

Opportunity Design: E-commerce Platform

In the remainder of this section, the focus is on the e-commerce platform opportunity.

Marketing Considerations for the E-commerce Platform

Here are considerations for effective marketing and sales from the e-commerce platform:

- The President of Ozark Vitality Tami Hale has a corporate marketing background with more than two decades of experience. This will be very useful in establishing a distinct identity for the Ozark arts and crafts.
- Effective branding of the Ozark name including logo design, marketing messages, digital marketing, and social media will be necessary to separate this site from many competitors in online craft sales.
- Encourage the customer to forge a personal connection to the artisan. Biographical stories, photos, and videos can make the artisan come alive for the customer.

- Pricing to meet external customer demand. There is evidence that many Ozark arts and craft items are priced low in order to sell to local residents. It may be possible to raise prices for items that are in demand by external, wealthier customers.
- Weaving the story of social good done through the project, specifically preserving the heritage of Ozark art forms and providing income to artisans. Many people, especially millennials, value “doing good” when choosing which item to purchase.
- Converting scarcity into a marketing advantage. Based on artisan surveys and interviews, there may be times when some products are in short supply. One possibility, especially for the more unique and expensive craft items such as large wood sculptures, is to convince the customer that this is a very exclusive product. People are often attracted to items that are rare and difficult to obtain and those that are uniquely customized for them. For example, a sculptor might only make four or five sculptures each year. Customers might be presented with photos, videos, and testimonials of the artisan’s sculptures on the website. They could be encouraged to reserve a sculpture with a design that they choose to be created within the next year. This may make the item even more desirable in the customers’ eyes. It will also reduce pressure in rapidly shipping the product since it is so exclusive and is being made to order.
- Pricing of the product is a consideration. The results from the River Enthusiasts survey suggest there are several tiers, or price points, at which customers purchase crafts. The first level at approximately \$25, the average price paid on Etsy, is for souvenir, novelty, and quick gift items. A second middle tier with an average price of \$70 is for home décor, fiber art, clothing, and similar items. Finally, the most unique and skillfully made items including fine arts comprise the third tier with an average price of approximately \$120. The financial projections indicate it will be essential to capture a sizeable number of sales in the middle to highest category for the e-commerce site to be financially viable.
- Marketing to visitors. As the River Enthusiast survey suggests, those visiting the region from larger cities are an attractive market for the handmade items. The visitors tend to be younger, have higher incomes, feel a fondness for the Ozarks, and have an interest in arts and crafts.

Packing and Shipping to Customers

An important issue that will need to be resolved for the e-commerce sales is the shipping of items from a hundred or more artisans scattered across six very rural counties with poor transportation and distribution systems. Among the options:

- The artisan holds his/her arts item until the item is sold. Then either the artisan packs and ships the item or staff from the ecommerce site travels to the artisan’s studio and ships the item. This method will reduce the inventory cost to the hub. However, relying on the artisan for shipment may be a burden on the artisan and risks that items will not be packaged appropriately. If items arrive broken, there are adverse consequences for the business. If staff from the hub travel to every artisan site when an item is sold, the cost in travel and time will be prohibitive.
- The hub could purchase all items for sale and keep them in a warehouse. Then inventory costs would be significant for the hub and it might be difficult to predict which items sell quickly and need to be kept on hand. However, the packing and shipping could be routinized.

- A small inventory of fast-selling items could be maintained in a warehouse. Artisans who create more expensive, larger, unique items could hold those items until the sale with the idea that customers will not expect immediate delivery.

There are many variants to these basic options. The point is that there will need to be a good solution to packing and shipping items to customers for the e-commerce site to succeed. Figuring out how best to accomplish this will be a priority for this opportunity.

Additional Design Considerations

- Relationships with artisans. Relationships established with artisans will determine their participation and cooperation. Hub staff will need to dedicate significant time to building relationships and explaining the system to prospective artist participants. While many artisans will be relieved to have assistance with sales and marketing, they must feel that the system is treating them fairly and respectfully.
- Although training is not the priority in the development of the e-commerce platform, it will add to the credibility and profile of the hub. Close relationships with artisans will make it easier to identify their training needs and design appropriate workshops. In turn, as artisans learn new skills in art and business, they will provide more product for the e-commerce site. One possibility is to hold training workshops at community colleges, community centers, and other viable training locations in the region. This reduces the need for ownership or rental of space and engages the local community in an important outreach effort. This is even more appropriate if the community college has an arts program.

Mobile Art Gallery

As suggested by the Ozark Vitality team, a mobile art gallery could complement the e-commerce site. The gallery could travel around the project area, and beyond, displaying an assortment of handmade Ozark arts and crafts. The gallery could serve a valuable marketing purpose and could also sell products directly in order to help cover operating expenses.

Here are several photos, provided by Ozark Vitality, to give a visual sense of the mobile art gallery. This vehicle is from Krewe, which makes handmade eyewear in New Orleans. Its design is reminiscent of a New Orleans shotgun house. The Artisan Innovation Hub could be designed as a small barn or cabin to fit into the landscape.



The estimated cost of the mobile gallery is \$30,000 based on estimates from tiny house manufacturers. A bulk of the money would go towards fixtures and appropriate counter space. There may be no need for a kitchen or bathroom. Solar panels could be used as a power source, to give the gallery off-grid capabilities for remote areas. The concept of the mobile art gallery fits nicely into the marketing and sales goals of the Coordinated Regional Network of Support Services opportunity, thus would be a nice addition to the project if funding allows. The mobile art gallery should be a non-profit venture with the capital cost covered by donations or a grant. Operating costs could be defrayed by earning commissions on art and craft sales.



Section 9: Financial Analysis

In this section, an estimated budget is presented. This budget covers the first two opportunities: Coordinated Regional Network and E-Commerce Platform over the first five years of operation. In the first opportunity, various support services already existing in the region, such as blacksmith makerspaces and heritage wood-working space, will be integrated into the network. The third opportunity: Expansion of Specialized Makerspaces, Training Venues, and Physical Retail Locations involves adding additional elements to the hub that are currently unknown, e.g. the exact number of stores and makerspaces, the type of stores and makerspaces, and their location. Furthermore, the potential makeup of the Ozark Art and Crafts Trail is not defined at this time. Therefore, the third opportunity is not included in the budget estimates.

It is recommended that the Artisan Innovation Hub have several revenue streams. The largest revenue stream will be sales of Ozark handmade goods. Revenue can also be obtained by selling t-shirts and other souvenir items to tourists. Supplemental revenue can be sought from state and federal grants, training fees for participants, sponsorships from businesses and civic organizations, donations from individuals, and funds from regional foundations and local governments. Funds from grants, donations, and foundations assume the enterprise is organized as a non-profit organization. At the end of this section, there is a brief discussion of the alternative forms of business organization that should be considered for the Artisan Innovation Hub.

Revenue – Grants

It is recommended that the Artisan Innovation Hub pursue initial funding from the United States Department of Agriculture – Rural Development and/or the Economic Development Administration. This innovative project may appeal to these agencies because the Artisan Innovation Hub will raise incomes in a large rural region in the Ozarks suffering from persistent poverty. Furthermore, it may become a model for other rural regions to follow. The Rural Business Development grant program of USDA-RD might be especially appropriate to this project. A grant could defray start-up costs for the e-commerce platform, including the design of the website and sales platform. In the estimated budget, the assumption is the project could receive a \$150,000 grant over the first five years. The funds will phase down each year, from \$50,000 in the first year, to \$40,000 in the second year, and so forth, reaching \$10,000 in the fifth year. As the grant phases out, earned revenues for the project will increase as the project becomes more sustainable.

This assumption is substantiated using a study out of the Springfield, MO area entitled *Nonprofit Impact Study 2014* completed by The Center for Nonprofit Communication at Drury University. The study concludes average earnings by non-profits in the Springfield area is \$150,000 or less, including those non-profits in the arts, culture, and humanities sector. By year 5 of this project, \$150,000 in annual earnings is projected as identified in Opportunity 1 and 2 Project Budget beginning on page 43.

Revenue – Sales of Artisan Goods

Sales on the e-commerce platform will be critical to the financial sustainability of the overall project. In the estimated budget, the assumption is that artisans are paid at a wholesale rate of 60% of the final purchase price. However, it is anticipated that sales prices can be increased significantly (compared to current level) for many artisans. Currently, most items are priced to sell locally, while the e-commerce platform will make the items accessible to wealthier customers living outside the region.

To estimate sales projections of the e-commerce platform, several industries were researched extensively. The challenge is that there is not an SIC or NAICS industry category for “online sales of arts and crafts.” The industry code that is most applicable is 453220, which is for Gift, Novelty, & Souvenir Stores. However, even then some craft-selling enterprises seem to be classified elsewhere, as for example, Southern Highlands Craft Guild which is classified as 561920 for Convention & Trade Show Organizers.

Despite these limitations, indicators of the potential sales for the online e-commerce platform were located as summarized in Table 9. First, the sales of an individual store selling arts and crafts was approximately \$122,000 in 2015. This is a store with both a physical location and an online presence, although the store sales are significantly more than the online sales. Second, a study in North Carolina reported that arts and crafts stores in that state had median annual sales of approximately \$160,000 (Stoddard, Dave, and Evans, p. 8). These are almost entirely physical stores without an online sales presence. Third, to get a sense of the sales of a typical gift shop that sells crafts, the data was sorted by industry code 453220, which revealed that median sales of 145 stores in this category were \$84,000. Finally, gift stores that sold online were identified and median sales of 33 stores was nearly the same, \$84,500.

Table 9: Industry Sales Data	
1) Sales of Individual Store selling arts and craft items	\$122,000
2) Median Sales of Arts and Crafts Stores in North Carolina Study	\$160,000
3) Sales of Gift Shops (Industry code 453220, Gift, Novelty, and Souvenir Stores) that Sell Crafts (n=145)	\$84,000
4) Median sales of Online Gift Stores (n=33)	\$84,500

Sources: 1), 2), and 3) LexisNexis Company Dossier database with calculations by the authors.

Although these sales figures seem relatively modest, they represent primarily physical stores that are family owned and operated. However, they suggest that increasing sales to a high level will take some time. While these are primarily physical stores, the e-commerce platform should be able to meet or exceed this level over time. Sales from other e-commerce platforms that sell regional craft items, such as Black Belt Treasures in Alabama and Southern Highlands Craft Guild in Appalachia were examined. Review of their financial reports indicated a wide variation in annual sales ranging from approximately \$125,000 to more than \$1 million (GuideStar).

One example of the sales potential for a regional craft outlet is the Southern Highlands Craft Guild. The Guild now represents more than 900 craftspeople in 293 counties of nine southeastern states. The Guild operates the Blue Ridge Parkway's Folk Art Center (in cooperation with the National Park Service), several retail shops, an online e-commerce platform, and many craft fairs. The Guild had sales of nearly \$3.5 million in 2015 from its various enterprises (GuideStar).

As the enterprise is organized in its first year, it is expected that sales from the e-commerce hub will start at a low level. Sales will rise sharply in Year Two as more artisans come on board and the marketing and sales platform becomes effective. From Year Two forward, a growth rate of 25% per year is anticipated as more artists participate and the Ozarks brand becomes more firmly established.

Revenue – Sales of Souvenir Items

Although not the focus of the hub, another potential revenue source is the sale of souvenir items, especially t-shirts. With the large number of tourists that recreate on the rivers of the region, there is a ready market for t-shirts to commemorate the trip. The t-shirts could be sold through existing merchants, restaurants, and tourist destinations. It is estimated that 1,000 will be sold in Year 1, with sales gradually increasing over time. Each t-shirt is estimated to earn a \$5 profit to the hub and \$5 to the sales location.

Revenue – Training fees

Participants in training workshops and courses, both in craft-making and business operations, will pay a nominal fee, estimated at \$10 per person. In Phase 2 of the project, more artisans will be engaged in training workshops as the network of artist assets is coordinated. Many artisans are interested in serving as instructors in craft workshops in which they can pass on their knowledge of traditional techniques to the next generation.

Revenue –Local Sponsorships, Donations, and Foundations

Sponsorships from local business and civic organizations will be valuable. Perhaps sponsors would be willing to pay the cost of certain events or support the artisans of a particular community. Furthermore, the hub might follow the lead of the Southern Highlands Craft Guild that holds a major biennial arts and crafts festival that serves as a rallying point to raise funds for the organization. If the hub offers such a festival, the event might become a major draw and attract additional sponsorships and donations. Another effect of the festival would likely be to increase interest in Ozark arts and crafts, thereby spurring sales on the e-commerce platform. Finally, there may be interest in financial support among local or regional foundations, such as the Community Foundation of the Ozarks, with a mission to assist the social and economic vitality of the Ozarks.

Expenses - Personnel

Personnel will be the largest ongoing expense for the Artisan Innovation Hub. The Director is a full-time position that is responsible for the overall management of the hub. Duties include marketing, artisan relations, fundraising, and financial management. The Sales/Customer Service is a half-time position responsible for shipping and distribution of product. Depending on how the logistics are managed, these funds could be divided among several regional representatives who assist with shipping. Having high-quality photos and other digital content will be important for sales, so a contractor should be hired for photo and video services.

Expenses - Cost of Goods Sold

This represents payments to artisans for their crafts and is calculated at 60% of the final sales price.

Other Expenses

Travel costs will be incurred in meeting with artisans, managing shipments, attending craft fairs, etc. Marketing costs will be minimal due to the use of social media and digital marketing, but promotional materials and digital ads will be utilized. An allowance is also made for office-related expenses. However, the budget assumes that current office space can be used for the hub and that no inventory space will be required. This, of course, may change depending on how the handmade sales are shipped.

Budget Overview

In the estimated budget, the initial grant provides financial support so the start-up can be successfully launched. By Year 5, the Artisan Innovation Hub is nearly at a break-even point without the grant support. Although Year 6 is not shown, by that time the hub would be turning a slight profit and would be on the way to financial sustainability. This is also indicated by the share of expenses that are paid from earned income, a ratio that increases from 24% in Year 1 to 72% in Year 5. This shows that the earnings from the sales of products are covering nearly 75% of costs by Year 5 lessening the need for sponsors, donations, and grant funding.

Form of Business Organization

The Artisan Innovation Hub could be organized as a for-profit business, a non-profit organization, or a producer cooperative. For that matter, different functions within the hub could be organized differently. For example, the e-commerce platform could be a for-profit business while the training and community-building functions are organized as a non-profit.

As the analysis indicates, a private business would require a significant initial investment. It is not clear that the e-commerce platform would be profitable for a number of years. Also, a private business may not find it profitable to perform some functions of the hub, such as training and/or designing an Ozark Arts and Crafts Trail. Yet these functions would accrue important social effects, such as more economically viable communities and greater solidarity.

It is recommended that the hub be organized as a non-profit, likely as a 501(c)(3) corporation. This enables the hub to receive grants from state and federal government and from foundations. It also allows for tax-deductible donations from individuals and businesses. As the financial analysis shows, grants and sponsorships are an important piece of the finances and furthermore create more local support and ownership of the project.

A third option, the formation of a producer cooperative, might be a possibility. The defining characteristic of a cooperative is that it is a business owned and operated by the people who use its services. A craft cooperative would be owned by artisans and used to purchase supplies and to market arts and crafts. Additional features that characterize co-ops are: service at cost, benefits proportional to use, democratic control, and limited return on equity (University of Wisconsin Cooperative Center). An

advantage of a producer cooperative is that artisans/owners would commit in advance as to how many art or craft items they would produce in a given year. This would make the supply more predictable.

The Illinois Cooperative Development Center (<http://www.value-added.org/cooperatives/>) serves the region and would be a good contact for more details on this business form.

Annual Sales Forecast

Year 1	Number sold	Unit price	Revenue
Tier One Items	400	\$30	\$12,000
Tier Two Items	80	\$75	\$6,000
Tier Three Items	40	\$120	\$4,800
Total Revenue			\$22,800
Year 2	Number Sold	Unit Price	Revenue
Tier One Items	800	\$30	\$24,000
Tier Two Items	160	\$75	\$12,000
Tier Three Items	80	\$120	\$9,600
Total Revenue			\$45,600
Year 3	Number Sold	Unit Price	Revenue
Tier One Items	1000	\$30	\$30,000
Tier Two Items	200	\$75	\$15,000
Tier Three Items	100	\$120	\$12,000
Total Revenue			\$57,000
Year 4	Number Sold	Unit Price	Revenue
Tier One Items	1250	\$30	\$37,500
Tier Two Items	250	\$75	\$18,750
Tier Three Items	125	\$120	\$15,000
Total Revenue			\$71,250
Year 5	Number Sold	Unit Price	Revenue

Tier One Items	1563	\$30	\$46,890
Tier Two Items	313	\$75	\$23,475
Tier Three Items	156	\$120	\$18,720
Total Revenue			\$89,085
*Based on 25% sales growth beginning in Year 3			

Opportunity 1 and 2 Project Budget

	Year One	Year Two	Year Three	Year Four	Year Five
Revenue					
Fundraising, including Grants	\$50,000	\$40,000	\$30,000	\$60,000	\$60,000
Training fees@\$10/ person	\$1,000	\$1,000	\$1,000	\$6,000	\$6,000
Sales of handmade goods	\$22,800	\$45,000	\$57,000	\$71,250	\$89,085
Sales of souvenirs	\$5,000	\$7,000	\$9,000	\$11,000	\$11,000
Donations/ sponsorships	\$15,000	\$20,000	\$20,000	\$30,000	\$40,000
Total Revenue	\$93,800	\$113,000	\$122,000	\$138,250	\$156,085
Expenses					
Start-up costs, website design, legal	\$20,000				
Personnel					
Director, full-time, \$50,000+20% benefits	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000
Sales/Customer Service, half time	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000
Operating					

Photographer videographer contractual	\$4,000	\$4,000	\$6,000	\$7,000	\$8,000
Travel	\$3,000	\$3,000	\$4,000	\$4,000	\$4,000
Marketing	\$8,000	\$8,000	\$8,000	\$8,000	\$8,000
Office supplies, computers	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Web technical support		\$2,000	\$2,000	\$2,000	\$2,000
Cost of goods sold (payments to artisans)	\$13,680	\$27,000	\$34,200	\$42,750	\$53,451
Total Expenses	\$126,680	\$120,000	\$130,200	\$139,750	\$151,451
Net income	-\$32,880	-\$7,000	-\$8,200	-\$6,500	\$4,634

Notes: Tier 2 sales are 20% of tier One sales, tier 3 sales are 10% of tier one sales based on survey data from River Enthusiasts.

Section 10: Economic Impact

Impact Scenario

Independent Artists, Writers, and Performers in 6
Counties

Emsi Q3
2017 Data
Set October

Parameters

Regions

Code	Description
5121	Randolph County, AR
5135	Sharp County, AR
29035	Carter County, MO
29149	Oregon County, MO
29181	Ripley County, MO
29203	Shannon County, MO

Industry Scenario

Code	Description	Change Type	Change Value
711510	Independent Artists, Writers, and Performers	Sales	\$285,735.00

Input-Output Year

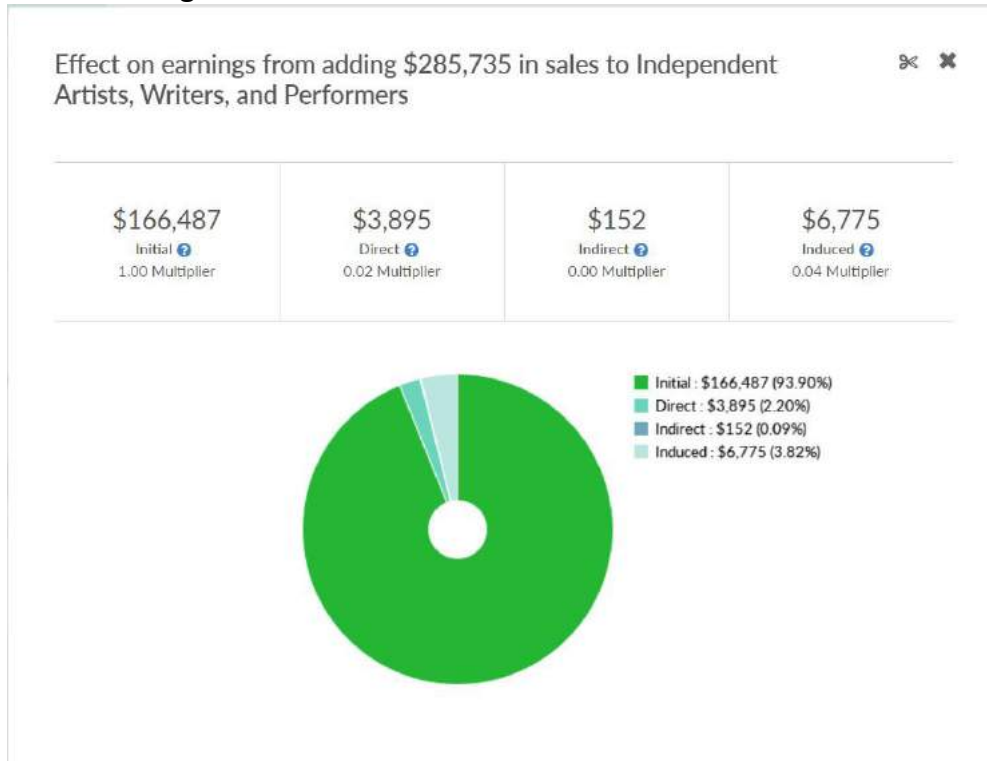
2016

Changes to Independent Artists, Writers, and Performers

\$177,308	20	\$3,498
Change in Earnings	Change in Jobs	Change in Taxes on Production and Imports (TPI)
1.06 Multiplier	1.03 Multiplier	

Based upon an addition of \$285,735 in sales in the Independent Artists, Writers, and Performers industry, the economic model from EMSI suggests a \$177,308 total change in earnings (1.06 multiplier) in the industry, equivalent to the addition of 20 jobs in the region. The change in earnings is identified by an initial \$166,487 injection into the industry, with a direct effect of \$3,895, and indirect effect of \$152, and an induced effect of \$6,775.

Figure 12: Effect on Earnings











Scenario Results - Industry

NAICS	Industry	Change in Jobs
71	Arts, Entertainment, and Recreation	19

Scenario Results - Occupation

SOC	Occupation	Change in Jobs
13-0000	Business and Financial Operations Occupations	1
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	18

Scenario Results - Demographics

Demographics	Change in Jobs
Female 14-18	0
Male 14-18	0
Female 19-21	0
Male 19-21	0
Female 22-24	0
Male 22-24	0
Female 25-34	2 
Male 25-34	2 
Female 35-44	2 
Male 35-44	3 
Female 45-54	0
Male 45-54	3 
Female 55-64	1 
Male 55-64	5 
Female 65-99	0
Male 65-99	1 

Section 11: Small Business Policy Framework

The Small Business and Entrepreneurship Policy Framework (Stapleton, 2012) is a strategic development tool created by the Delta Regional Authority as a roadmap for creating and fostering entrepreneurial ecosystems in local communities. The five key drivers of the framework are: (1) Developing a Pipeline of Educated and Skilled Entrepreneurs; (2) Cultivating Innovation and Technology Exchange; (3) Improving Access to Capital; (4) Promoting Awareness and Building Networks; and (5) Optimizing the Regulatory Environment.

Using the framework as a strategic roadmap helps keep the focus on relevant issues facing today's entrepreneurial ecosystems. The long-term goals are to help spur job growth through entrepreneurial activity, foster an innovative business environment, and create long-term regional competitive

strengths. The Ozark Artisan Innovation Hub project applies this framework to support artisan entrepreneurs and in turn is creating an ecosystem that will enable artists to grow and thrive.

Developing Educated and Skilled Entrepreneurs

A high level of focus on providing education and training for potential and existing entrepreneurs has been a proven way to advance the entrepreneurial ecosystem. The educational component should exist on all levels of formal and informal education, from the elementary school classroom, to college majors and minors, to publicly available support programs, to local networking groups. Providing resources for individuals to learn and apply the knowledge and skills necessary to succeed as an entrepreneur is a key component of creating an entrepreneurial ecosystem that can create new jobs, attract new industries, and spur economic growth.

The Ozark Artisan Innovation Hub project will support this driver by providing education and training to the artisan entrepreneurs. The recommendation to offer small business counseling through the Small Business and Technology Development Center (SBTDC) and the art-focused training through local artisans will create opportunities to develop a pipeline of artisan entrepreneurs in the region. Of the 2,815 small businesses in the six-county region, 469 are self-employed (National Establishment Time Series, 2015). With nearly 17% of small businesses and \$535M (National Establishment Time Series, 2015) in sales from those businesses directed to the region currently, it is easy to see how developing a continual pipeline of entrepreneurs is important to the eastern Ozarks.

Cultivating Technology Exchange and Innovation

To help foster an innovative economy a region must understand and invest in technological advances and opportunities. This can happen through collaboration among educational institutions, companies, public policy makers, and entrepreneurs. This exchange of new knowledge and ideas is a key factor in creating the optimal circumstances for economic growth among small and medium sized establishments. The entrepreneurial ecosystem benefits in many ways from a high level of technology exchange and innovation, among which is the ability to attract and grow new competitive industries that will meet future market demands.

The rural region that is the focus of this project has an opportunity to draw upon the regional asset of heritage art, also the predominant industry clusters of agriculture and forest and wood projects, and advance the economy through art innovation. It is recommended that an art makerspace where artisans can share equipment and the potential exists for the creation of new products is considered for development in opportunity three. A physical location where the exchange of ideas and access to technologies that may not otherwise exist in rural communities will help foster innovation.

Although there are gaps in artisan resources and needs for investment in a physical makerspace, the overwhelming and immediate need appears to be virtual connectivity and basic digital infrastructure. Lack of adequate broadband and virtual connectivity translates to a lack of awareness and cross-community participation with existing resources. Some of those perceived gaps could potentially be met with existing resources if there were a way to increase the level of knowledge sharing that can occur with virtual connectivity. Therefore, another recommendation for cultivating technology exchange and

innovation is through the development of at least one location within each community where community members could gather with strong enough broadband to participate in virtual events. This could include video conferencing capabilities that will allow groups of people to gather locally to connect live/face-to-face with other groups in other communities.

In addition to the virtual connections that could be established, artisans could possibly sell products in each other's stores and/or participate in each other's festivals if they are aware of such events. Building a virtual network connecting public/community spaces in the six counties would ensure artisans had at least one location where they could go, in their own community, for strong broadband connectivity. Leveraging technology as a group via shared resources may make it less intimidating for the many low-tech artisans in the region who are afraid of technology but realize it is important for them to promote their work online. Retro-fitting existing community spaces with broadband and limited/temporary workspace can begin to measure demand for more permanent business incubators and help determine where they should be located for maximum impact.

Access to Capital

A region's ability to provide the needed funding for new ventures, as well as growing companies, is essential to a healthy entrepreneurial ecosystem. Access to traditional bank financing is just one way to help entrepreneurs develop and grow. Attracting investors, whether they are angel investors, venture capitalists, or larger companies looking for new ideas, is also an important factor in ensuring the right type of funding can be accessed by entrepreneurs. Additionally, rural regions can benefit greatly from establishing gap financing tools such as revolving loan funds.

One strategy for assisting artisans with initial capital they need to invest in equipment or materials is through the creation of a forgivable loan or grant program. Sponsors or community supporters of the project would be one avenue to seek out for this type of funding.

Promoting Awareness and Building Networks

Promoting an entrepreneurial culture where entrepreneurs are valued and the community is willing to support local establishments is another key aspect of a successful entrepreneurial ecosystem. This may be achieved through developing local networking opportunities, creating mentorship programs, informing the public about the social and economic impact of entrepreneurship, and engaging entrepreneurs to address the region's greatest opportunities.

Creating a project such as the Ozark Artisan Innovation Hub is the exact definition of promoting awareness and building networks. The very nature of the Hub will allow artisans to network with and learn from each other; and engage a sector of entrepreneurs that are important to the regional economy. It is recommended that opportunity three of this project should include the creation of an Ozark Arts and Crafts Trail. This is another opportunity to build networks and promote awareness of the region's major cultural asset.

If the development of virtual technology networks are created as recommended, additional personal connections and relationships can be built across communities which is important for a regional project.

Artisans can learn about and collaborate with each other on regional events and maintain easy access to like-minded creatives for idea sharing and lead generation opportunities.

Optimizing the Regulatory Environment

Helping entrepreneurs navigate and succeed within legal boundaries is the final key driver of a strong entrepreneurial ecosystem. This means that entrepreneurs should have easy access to information and help with understanding regulations and policies that affect their businesses. It also means that public officials should investigate the potential barriers that exist for entrepreneurs to thrive. A dialogue must be cultivated where both entrepreneurs and policy makers can meet and understand each other's needs and wants.

While this research didn't reveal regulatory issues that may prevent the project from moving forward, it is always a good idea for governmental agencies to be aware of regulations that may have a negative effect on rural entrepreneurs. From business licensing to zoning regulations, ensuring that entrepreneurs are supported from the governmental level is one key to the start of a successful small business.

Section 12: Summary and Conclusion

"In order to carry a positive action, we must develop here a positive vision." ~ Dalai Lama

The Ozark Artisan Innovation Hub is a visionary project for the economic revitalization of the eastern Ozarks. It is an excellent example of asset-based community development, that is, tapping into the assets of the community to spur its growth and development. In the case of the hub, the main asset being utilized is the creative skills of artisans that are often overlooked and invisible.

In this feasibility study, information was gathered from many sources to examine whether the vision could become a reality. The authors of this study directly participated in six regional workshops with artisans, surveyed and interviewed more than 80 artisans; analyzed secondary data on the regional economy and related industries, surveyed tourists who recreate on the scenic rivers in the region, participated in many meetings with project staff from Ozark Vitality, and partners from the University of Missouri Extension; and conducted case study visits to other communities with similar arts-based projects.

We discovered that the region already has many important artistic assets in place, such as makerspaces for blacksmithing and heritage wood-working venues for training in arts. The region has a rich treasure trove of artisans making a diverse collection of arts and crafts ranging from specialty foods to naturally dyed clothing. Interactions with artisans during the project suggest that their primary need is assistance with marketing and sales of their crafts. Many artisans would also like help with their business operations. The external demand for Ozark artisan products is significant. For example, recreational users of the scenic rivers in the region were identified as a potential market. This group has above-

average incomes, loyalty to the Ozarks, fondness for the Ozark brand, and interest in arts and crafts. They are already purchasing crafts from the region, although on a limited basis. Although more difficult to measure, the supply of arts and crafts seems adequate considering the high interest level among artisans in the project. The only caveat is that a significant percentage of artisans view their creative work as a leisure activity and do not want to become full-time producers.

Based on these findings, it is recommended that the Ozark Artisan Innovation Hub pursue three opportunities:

Opportunity One | Coordinated Regional Network of Support Services

Build connections among the various artist assets as listed in Section 3 of this report, including Arkansas State University – The Garage in Jonesboro, Alley Spring and Mill near Eminence, MO, Black River Beads & Pottery, Downtown Playhouse in Pocahontas, Echo Bluff State Park, Arcs & Sparks, Arts Center of North Arkansas, National Park Service Heritage Shop and Woodworking Makerspace, Hardy Art Gallery, Marilyn’s Clogging Company, Heritage Homestead and Tom Kennon Blacksmith Shop, and Spring River Art Guild. Building the network will enable artisans throughout the six-county region to obtain the assistance that they need in an “artisan-friendly” system.

This opportunity should also explore the expansion of virtual connectivity so that all counties can increase their knowledge sharing possibilities. At least one community in each county should have the digital infrastructure in place to allow for virtual connections amongst artisans and support services.

Opportunity Two | E-commerce Platform for Sales and Marketing

Establish an e-commerce site for sales and marketing of Ozark art and crafts. The platform should distinguish itself from other sales sites by effectively branding the Ozark name, enabling customers to feel personally connected to the artisans, carefully developing a sense of exclusivity for more expensive products, and utilizing a mobile art gallery to demonstrate the uniqueness of the arts and crafts. Along with the sales emphasis, there should be training and business counseling opportunities for artisans.

Opportunity Three | Expansion of Specialized Makerspaces, Training Venues, and Physical Retail Locations

As sales expand, it will be feasible to add specialized makerspaces, such as in fiber arts, to boost training of artisans and encourage passing down the skills to the next generation. Furthermore, more workshops and other events will be made available to artisans and there may be sufficient demand to merit additional physical retail spaces to sell the handmade products. As part of this opportunity, an Ozark Art and Crafts Trail could be developed, offer tourists the opportunity to travel from one community to another learning and experiencing Ozark craft-making.

The analysis reveals the project will have a positive economic impact of 20 jobs and approximately \$177,000 in earnings. These are conservative estimates as it is expected that festivals and other hub activities will attract more visitors and income to the region further expanding the impact on the regional economy.

The financial projections through five years indicate the hub will require significant grant and sponsor support to enable its growth. However, by Year 6, the hub is projected to be financially sustainable without grant support. Key issues for success of the e-commerce platform will be: 1) developing an efficient and cost-effective system of packing and shipping, 2) establishing a unique market brand, and 3) building strong community support to facilitate sponsorships and donations.

In conclusion, the Ozark Artisan Innovation Hub is a vision worth pursuing. It will require strong leadership, marketing skills, business acumen, external grant support, and community support to succeed. Based on our experience working with Ozark Vitality and participating in community meetings and workshops with them during this project, we believe they have the collaborative approach and community support to make their vision a success.

Appendix

Appendix A – Economic Impact

Input-Output Data

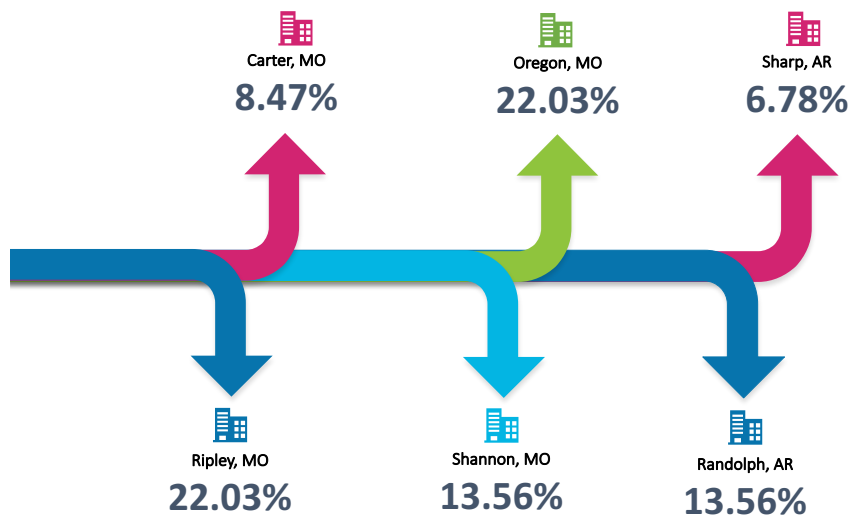
The input-output model in this report is EMSI’s gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several EMSI in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

State Data Sources

This report uses state data from the following agencies: Arkansas Department of Workforce Services; Missouri Department of Economic Development

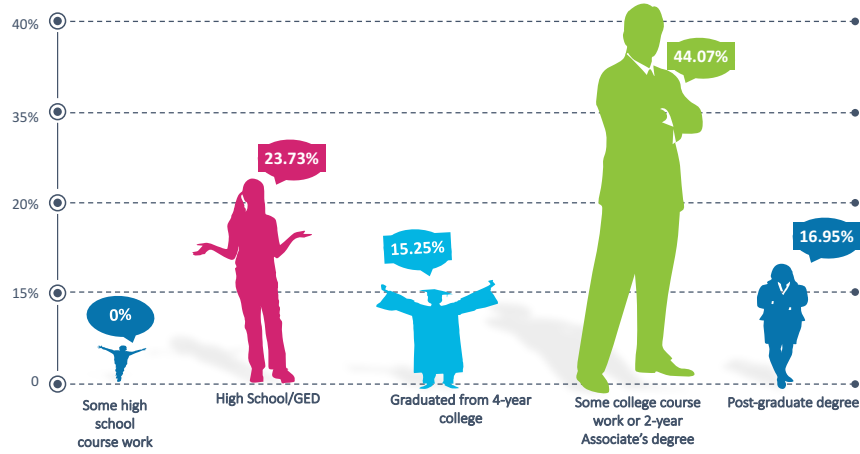
Appendix B - Artisan Survey Results

Q1
Select the county in which you live.



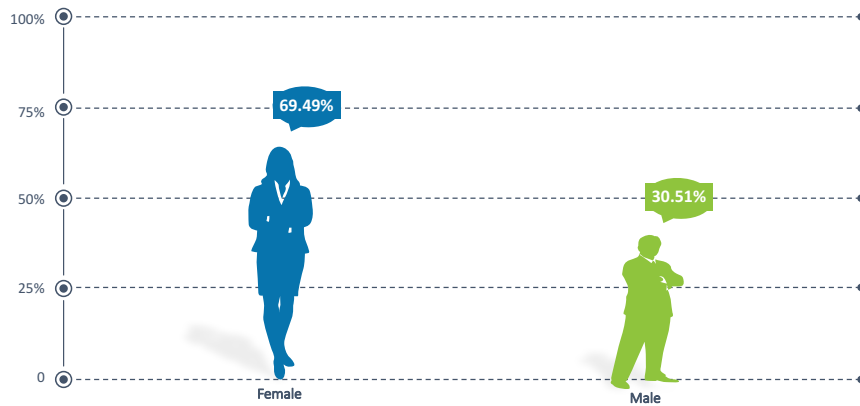
Q3

What is the highest level of education that you have completed?

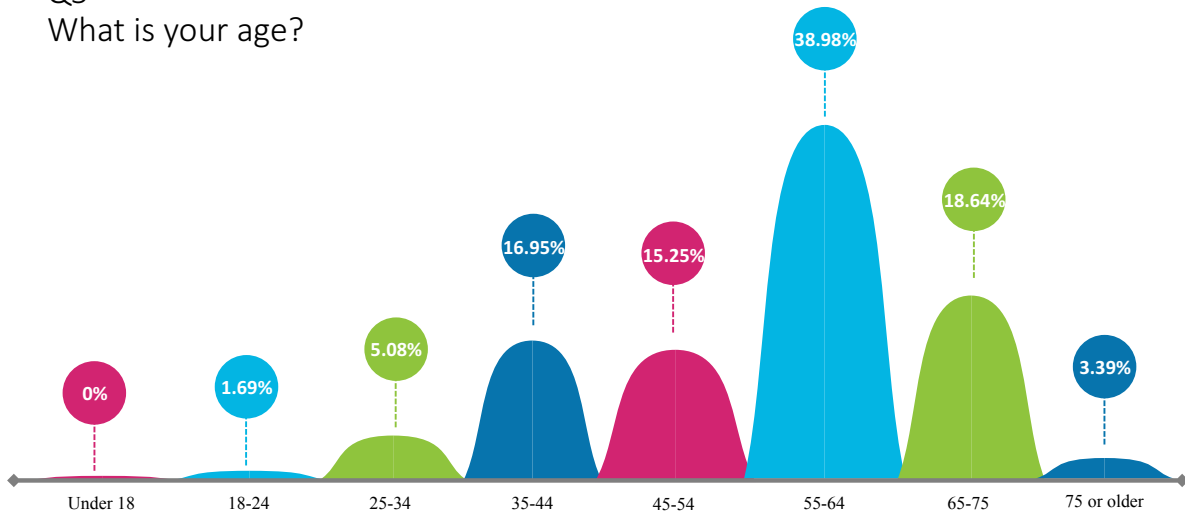


Q4

What is your gender?

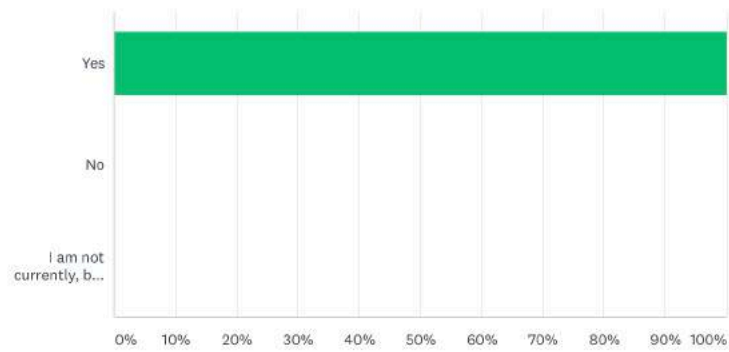


Q5
What is your age?



Q6
Do you currently or have you ever personally crafted items to sell?

Answered: 59 Skipped: 0

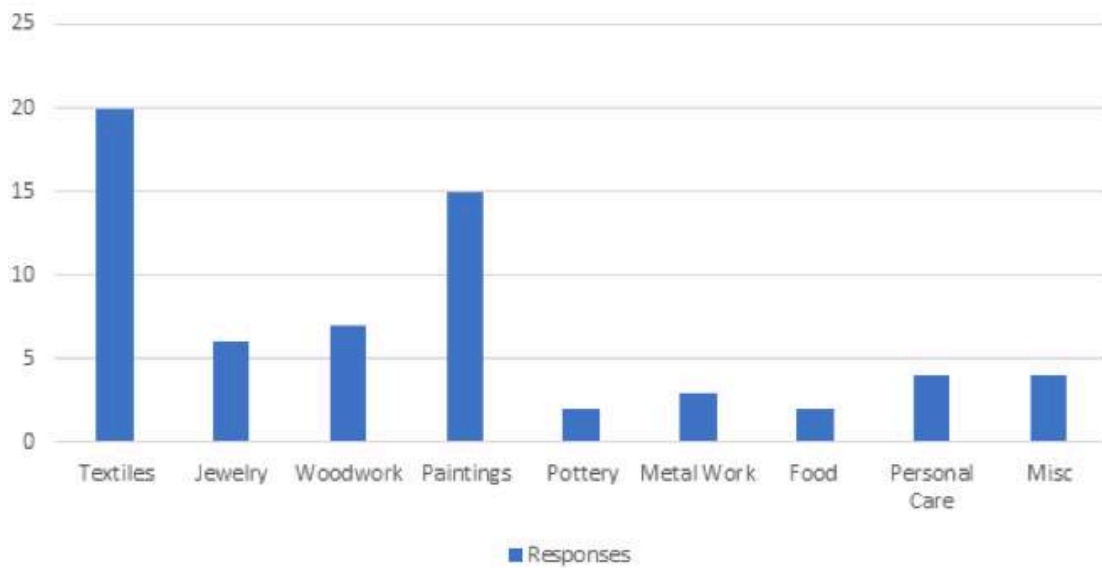


Q7

Please provide your contact information if you would like to hear the results of this research project.

Q8

What type of art/crafts do you make? (Examples: paintings, leather goods, jewelry, quilts)

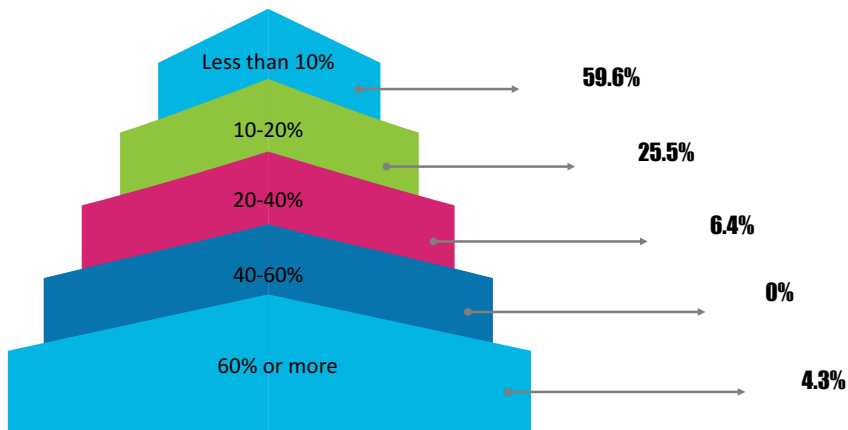


Q8 Actual Responses

1. Mixed media art, printmaking, grapevine basket weaving jewelry
2. Myself-painting my husband-sculpture together-upcycled craft
3. Preserve memories and help people visually express their work in a way that appeals to customer base new, old
4. Paintings
5. Fabric crafts
6. Fiber arts, spinning, weaving, knitted and woven items
7. Wood working build mandolin
8. Metal objects
9. Health and beauty, silver jewelry, rings, essential oils hydro oils
10. Wood carving and some furniture
11. Soap making, broom making
12. Jewelry and wire trees/and sun catchers
13. Pottery, jewelry
14. Giclee prints
15. Sewing, woodworking
16. Quilts, potholders, baby items
17. Silver jewelry
18. Cnc metal work
19. Jewelry
20. Wood working – wood turning
21. Knitting-lace shawls, socks, dolls, gloves, slippers, etc
22. Silver jewelry
23. Wood/metal (blacksmithing pending)
24. Handmade pottery and fine art clay works
25. I own a gallery in VanBuren and represent many local artist River Spirit Gallery & Crafts
26. Drawing, painting, wood burning, air brushing
27. I make scented candles, bar soap, hand soap, hand lotion and lotion bars, also wood burning art
28. Paintings, illustrations, and handicrafts
29. Violin and mandolin maker-luthier
30. Paintings, aprons, purses
31. Clothing, children's pageants
32. Crochet, paper crafts, jewelry
33. Greenery arrangements, oil paintings, sewings
34. Goat milk soap
35. Small art quilts, art purses
36. Drawing living plants
37. Jewelry, stained glass, woodwork, quilting, potter
38. Old time folk music weaving, spinning, dyeing
39. Wood, bonnets, clothes, fabric items
40. Spinning/weaving/natural dyeing
41. Hand spun yarn
42. Market grass fed meat (not actually a craft) and wooden crates
43. Soaps, spa products, farmer's market produce
44. Paintings on antique windows and other glass surfaces, diffuser necklaces
45. Fabric
46. Oil paintings, acrylic and epoxy paintings, glazed and painted stoneware's, paper mache, sculpture, charcoal drawings, furniture restoring and painting, printmaking
47. 3-D printing, robotics, HAM Radio
48. web design
49. music/dance
50. the list is endless – round tuits
51. paintings, drawings, wood working
52. fiber arts and weaving, paintings quilts, jewelry, beads, stained glass basket and more
53. drawings & paintings
54. benches, signs, gates, fences, all steel
55. pottery and sculpture. I have been awarded state of Wisconsin-many awards in local and regional exhibits. Former coordinator for WRAP-Wisconsin Regional Arts Program.
56. Oil paintings and photography
57. Blacksmithing-hand forged items; blade smith-knives
58. Spinning, weaving, sock making, soap lotions, quilting, stainless, artisan baking
59. Fabric items, painted items, wood items, misc decorative items
60. Crocheting
61. Aprons, handbags, totes
62. Painted wood signs and workshop instruction

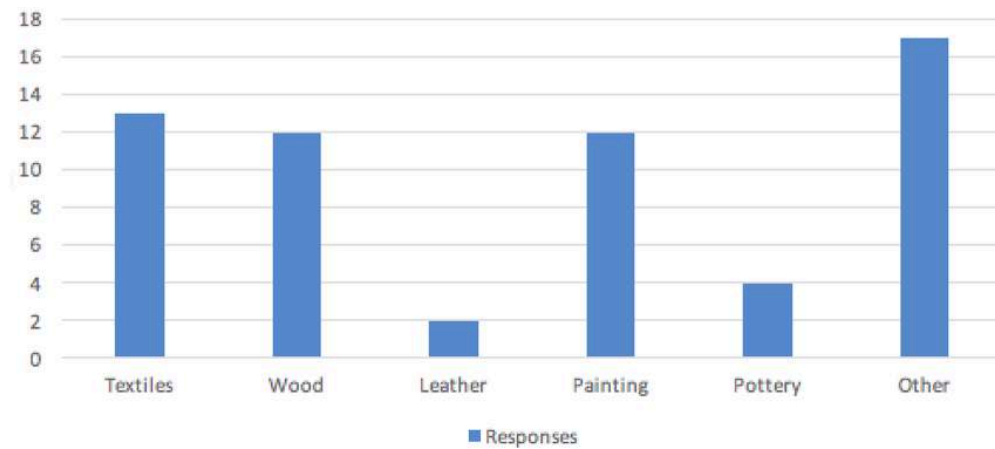
Q9

What percentage of your household income comes from your art or creative work?



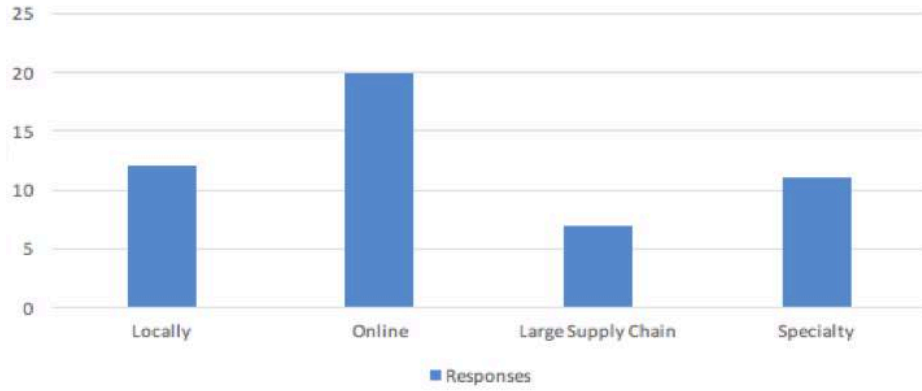
Q10

What resources (for example: wood leather, clay, etc.) do you currently purchase or use for your art/craft?



Q11

Where do you purchase the resources you currently use for your art/craft?
(Examples: Amazon, ACE Business, etc.)



Q11 Actual Responses

1. Dick blick, eBay, amazon
2. Local hardware, dick blick
3. Walmart
4. Hobby lobby, amazon, dick blick
5. Online and area fabric shops
6. Locally/internet
7. Old standard tone wood, fulton, mo
8. Metal supply co
9. Local stores, internet
10. Hardware tool companies
11. Walmart-lard or some people give us lard broom
corn-medico, hemp yarn Walmart
12. Internet
13. Online
14. Amazon
15. Craft stores
16. Local stores, online, business
17. Jewelers supply companies
18. Steel yard
19. Amazon, hobby lobby, etsy
20. Collect it, re-use, retail lumber stores
21. EBay, or specialty online stores
22. Hobby lobby, hancock fabrics, Joanne's crafts
23. Local fabric store, amazon
24. Amazon, ebay, yarn.com
25. Online
26. Amazon
27. Michaels
28. Yarn barn in Lawrence, KS
29. Local businesses
30. Other farmers, vendors and websites
31. From the internet and art fiber festivals
32. Local hardware/lumber stores
33. Amazon, Aztec candle supplies, wholesale supplies
plus
34. Ebay or sales online
35. Thayer fabric, Batesville, fabric.com JoAnns
36. Hobby Lobby and online sources
37. One line
38. Different suppliers, amazon, eBay, etc.
39. Lowes, Home Depot, Local Hardware
40. Local suppliers
41. Fire Mt., Earth Guild. Everywhere but here!
42. Hobby lobby, Walmart & online
43. Mostly steel and parts
44. Springfield
45. BEH phot- Dick Blick
46. Blacksmith and knife making suppliers (mostly
47. Unfortunately, must be done online for most
supplies
48. Local stores
49. Wal mart
50. Sewing center in west plains, mo
51. Local hardware store- covers in Thayer also items
through local Walmart and online through amazon
and various suppliers

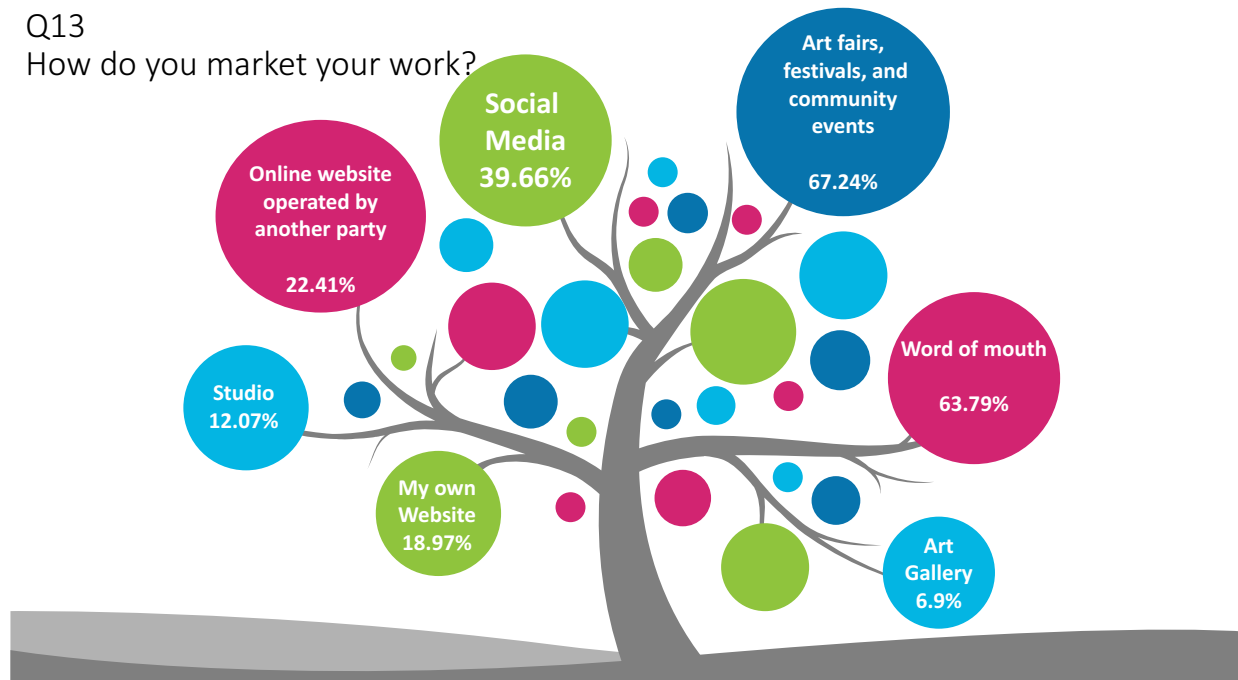
Q12

How was/is your experience with selling your products?



Q13

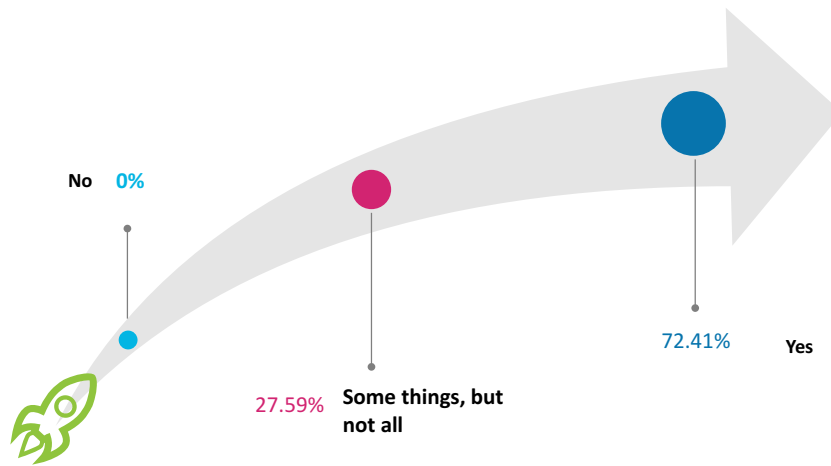
How do you market your work?



*note: percentages are based on response rate and multiple answer options

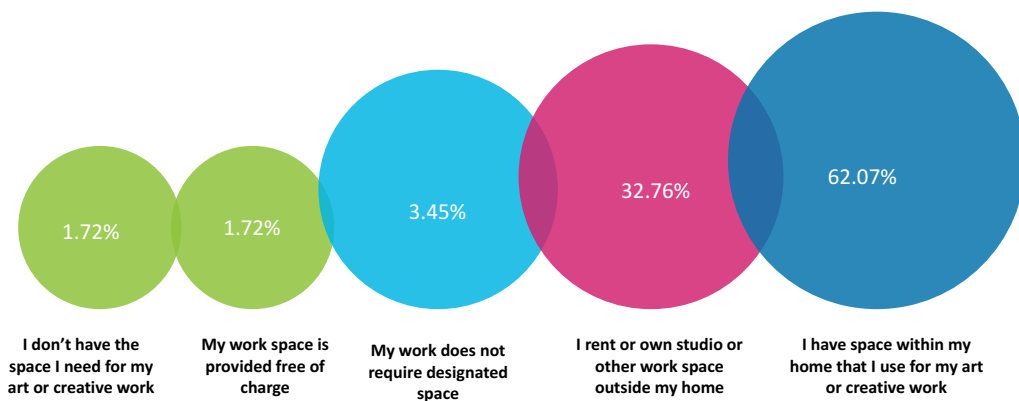
Q14

Do you have access to the tools and supplies that you need to make your art/craft or perform your creative work?



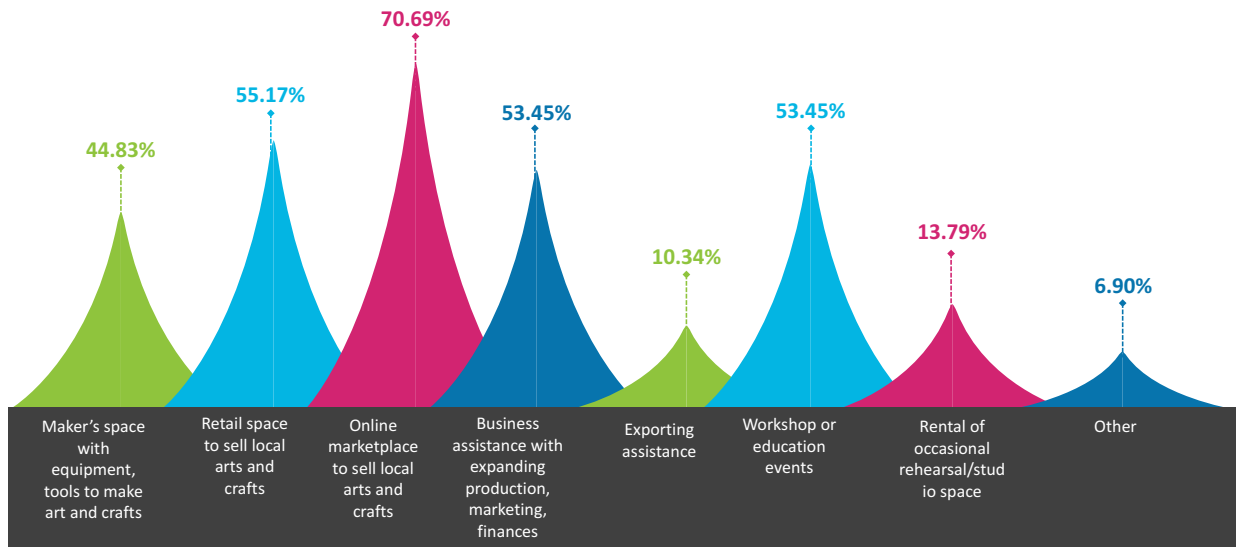
Q15

Which best describes your current work space situation?



Q16

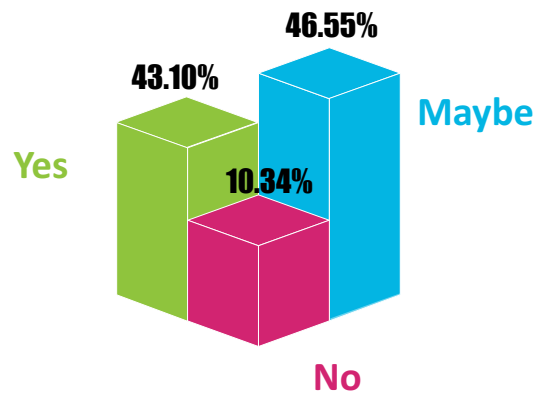
Select all of the below amenities you would use if available at the Artisan hub



*note: percentages are based on response rate and multiple answer options

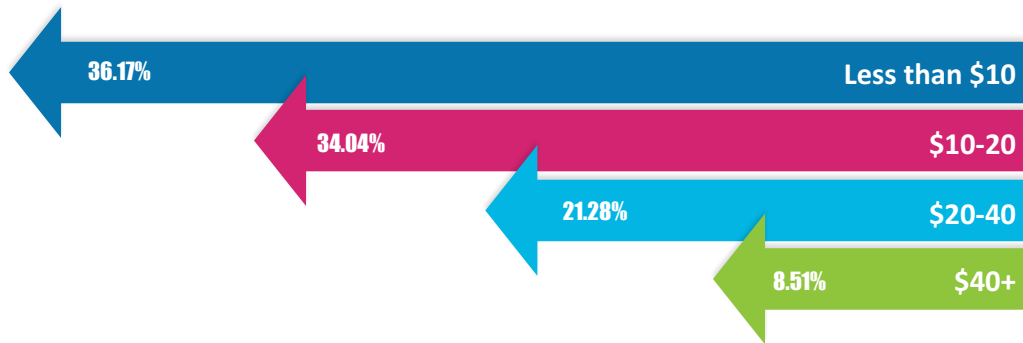
Q17

If the proper work space and equipment is available at an Artisan Hub, would you be willing to pay a monthly fee to be a member and have access?



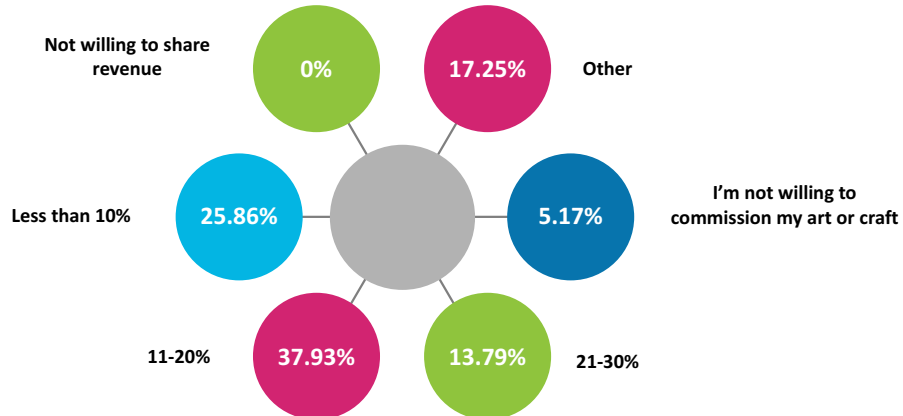
Q18

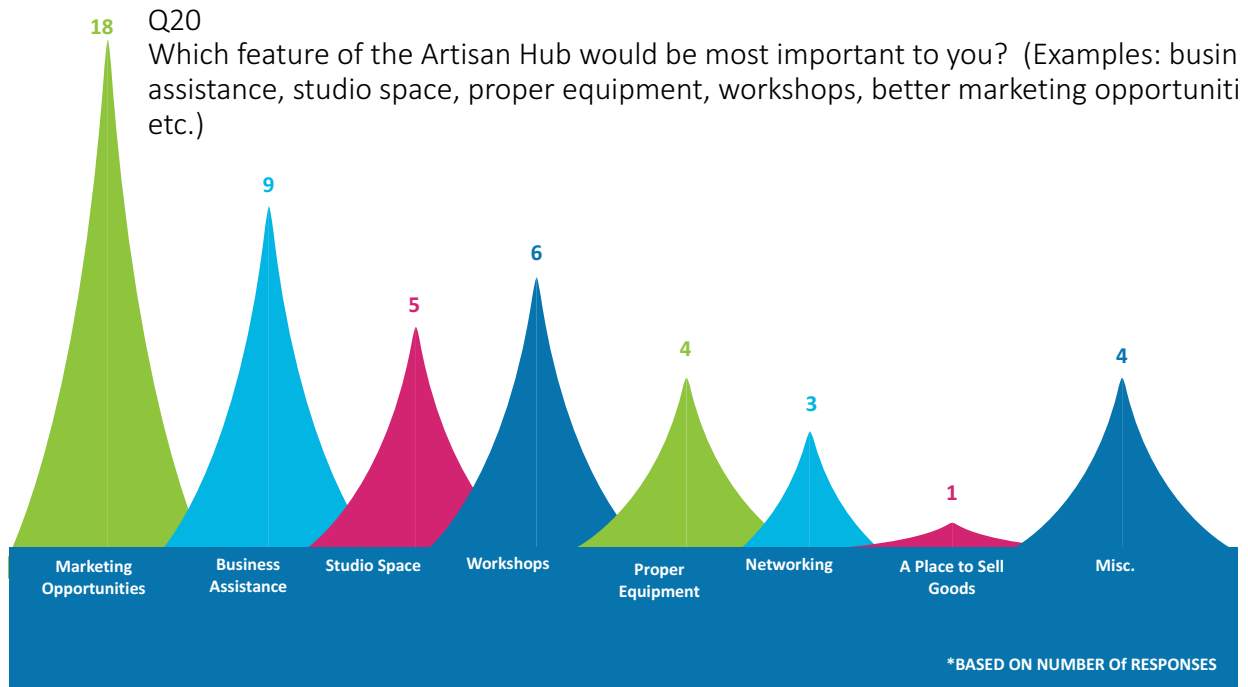
If yes, or possibly, how much would you be willing to pay each month?



Q19

If you are willing to commission your art or craft at the Artisan Hub, what percent of revenue would you be willing to pay as a sales fee?



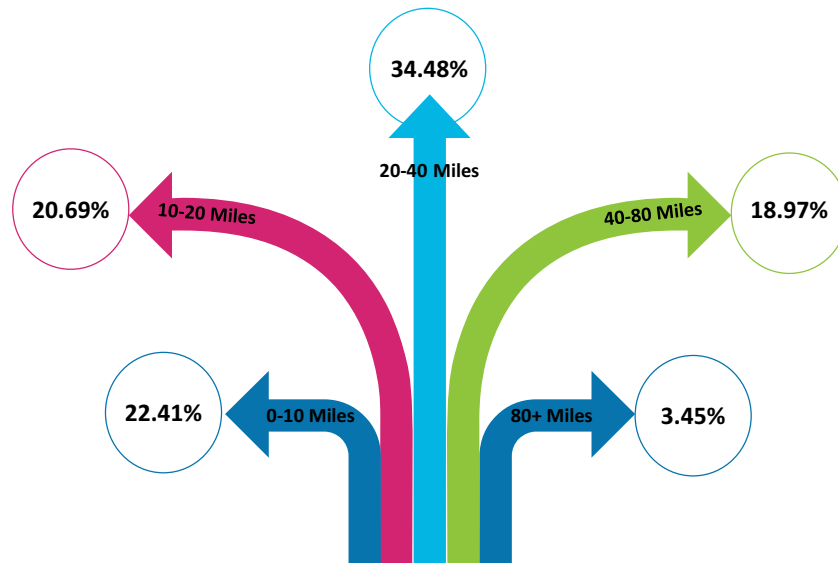


Q20 Actual Responses

1. All listed
2. Business assistance better marketing opportunities
3. Proper equipment, workshops
4. Marketing opportunities
5. Marketing opportunities
6. Better marketing
7. Marketing bringing interest back in original art work
8. Workshop, marketing
9. Marketing
10. Brainstorming ideas
11. Better marketing opportunities
12. Marketing
13. Website
14. Better marketing
15. Education workshops on new techniques
16. Better marketing opportunities
17. To help with connecting with other artist
18. Business assistance
19. Studio space
20. Business assistance, better marketing
21. Business assistance/marketing help
22. I think all at some point all will be important
23. Business assistance, better marketing
24. I attended workshops with materials vendors annually
25. Marketing
26. Marketing
27. Better marketing opportunities
28. Business assistance, better marketing opportunities, bar code co/op or subsidies
29. Better marketing
30. Studio space, proper equipment, marketing opportunities
31. Networking
32. Business assistance, grant info., marketing
33. All of the above
34. Business assistance and marketing
35. Studio space, workshops, and better marketing opportunities to meet people of the same interest
36. Business assistance, better marketing opportunities
37. Workshops
38. Better marketing opportunities
39. Place to sell also online sales
40. Maker space with access to tools and equipment that I otherwise wouldn't have access to

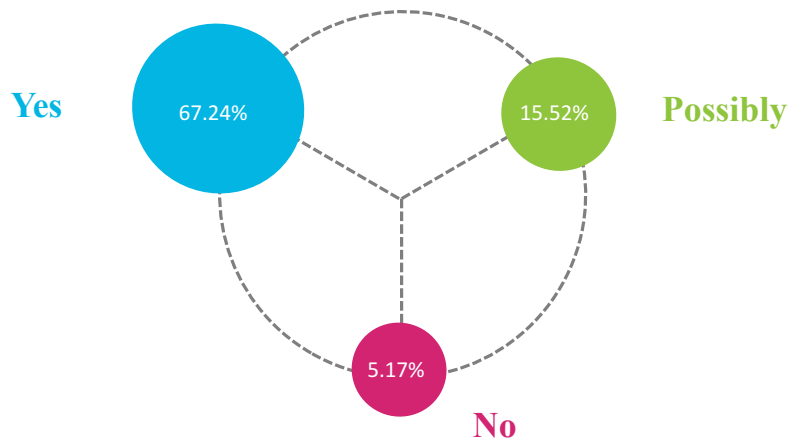
Q21

How far would you be willing to travel to utilize desired amenities offered at the Artisan Hub?

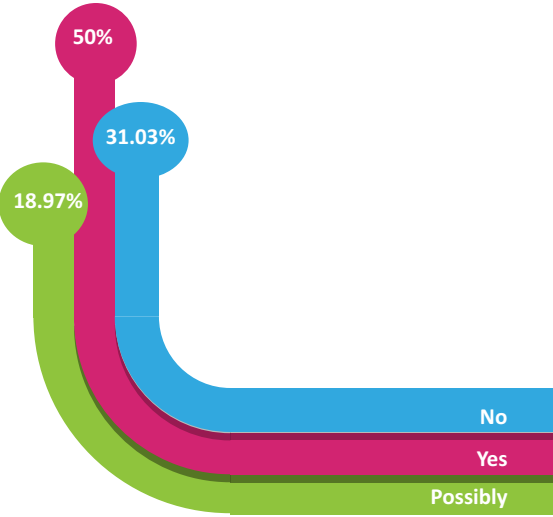


Q22

Are you interested in increasing your income from art/creative work?



Q23
Would you be interested in meeting with a business consultant at your local Small Business Development Center to investigate how to make more profit from your art/creative work?



Appendix C - River Enthusiast Survey Results

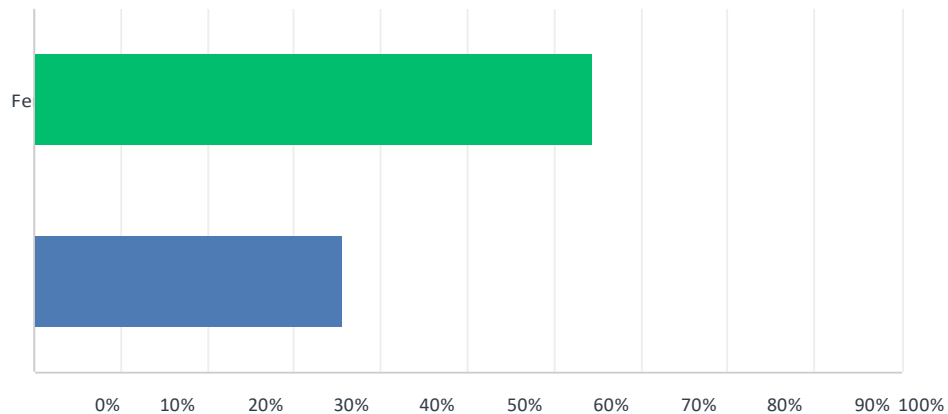
Q1 In what ZIP code is your home located? (enter 5-digit ZIP code; for example, 00544 or 94305)

Answered: 45 Skipped: 0

#	RESPONSES	DATE
1	63021	8/13/2017 2:25 AM
2	72482	8/9/2017 6:35 AM
3	63822	8/8/2017 7:31 AM
4	64058	8/7/2017 7:42 PM
5	65453	8/7/2017 6:55 PM
6	72476	8/7/2017 5:57 PM
7	64062	8/7/2017 5:37 PM
8	63935	7/26/2017 9:13 PM
9	63703	7/21/2017 9:17 PM
10	65466	7/21/2017 12:00 AM
11	65560	7/19/2017 3:37 PM
12	64118	7/19/2017 12:32 PM
13	63935	7/19/2017 8:08 AM
14	63383	7/19/2017 7:08 AM
15	63111	7/19/2017 4:08 AM
16	62234	7/19/2017 2:56 AM
17	63303	7/18/2017 10:40 PM
18	63703	7/18/2017 10:22 PM
19	72455	7/18/2017 9:32 PM
20	63501	7/18/2017 8:56 PM
21	65453	7/18/2017 8:40 PM
22	63935	7/18/2017 7:00 PM
23	65560	7/18/2017 6:59 PM
24	63129	7/18/2017 6:40 PM
25	63050	7/18/2017 6:19 PM
26	61488	7/18/2017 5:53 PM
27	65202	7/18/2017 5:06 PM
28	63048	7/18/2017 3:16 PM
29	63119	7/18/2017 3:08 PM
30	64081	7/18/2017 2:09 PM
31	63021	7/18/2017 2:07 PM
32	65202	7/18/2017 1:21 PM
33	63955	7/18/2017 1:10 PM
34	63090	7/18/2017 12:38 PM
35	65721	7/18/2017 12:03 PM
36	65201	7/18/2017 11:58 AM
37	63104	7/18/2017 11:27 AM
38	49022	7/18/2017 11:07 AM
39	62220	7/18/2017 10:39 AM
40	60006	7/18/2017 10:34 AM
41	63701	7/18/2017 10:25 AM
42	60640	7/18/2017 10:19 AM
43	62069	7/18/2017 9:56 AM
44	64114	7/18/2017 9:53 AM
45	62466	7/18/2017 9:52 AM

Q2 What is your gender?

Answered: 45 Skipped: 0



ANSWER CHOICES

RESPONSES

Prepared for Ozark Vitality

Female	64.44%	29
Male	35.56%	16
TOTAL		45

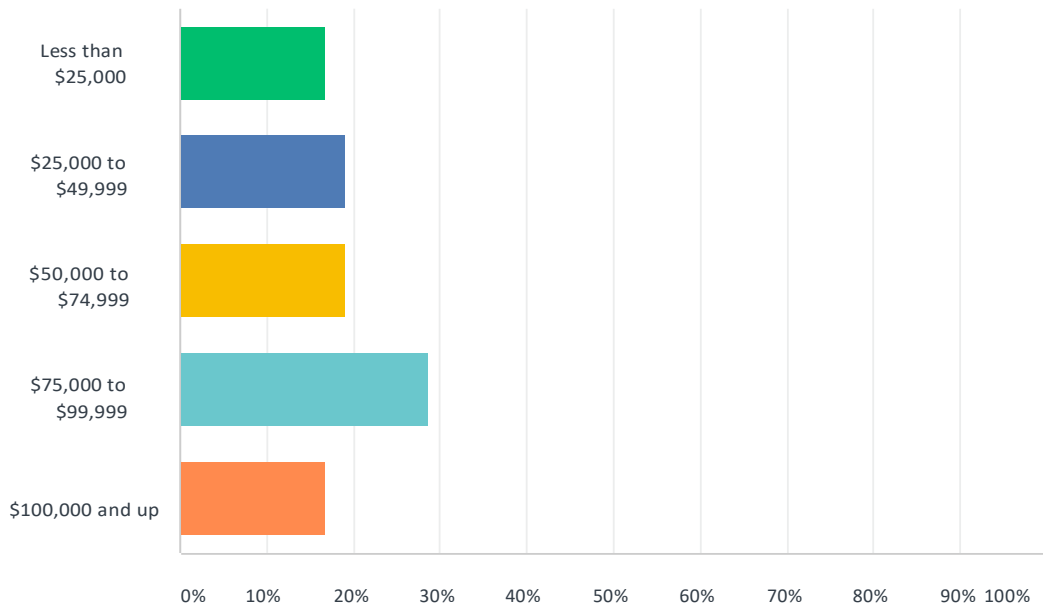
Q3 What is your age?

Answered: 45 Skipped: 0

ANSWER CHOICES	RESPONSES	
Under 18	0.00%	0
18 – 24	4.44%	2
25 – 34	6.67%	3
35 – 44	17.78%	8
45 – 54	31.11%	14
55 – 64	33.33%	15
65 – 74	6.67%	3
75 or older	0.00%	0
TOTAL		45

Q4 What is your approximate annual household income

Answered: 42 Skipped: 3

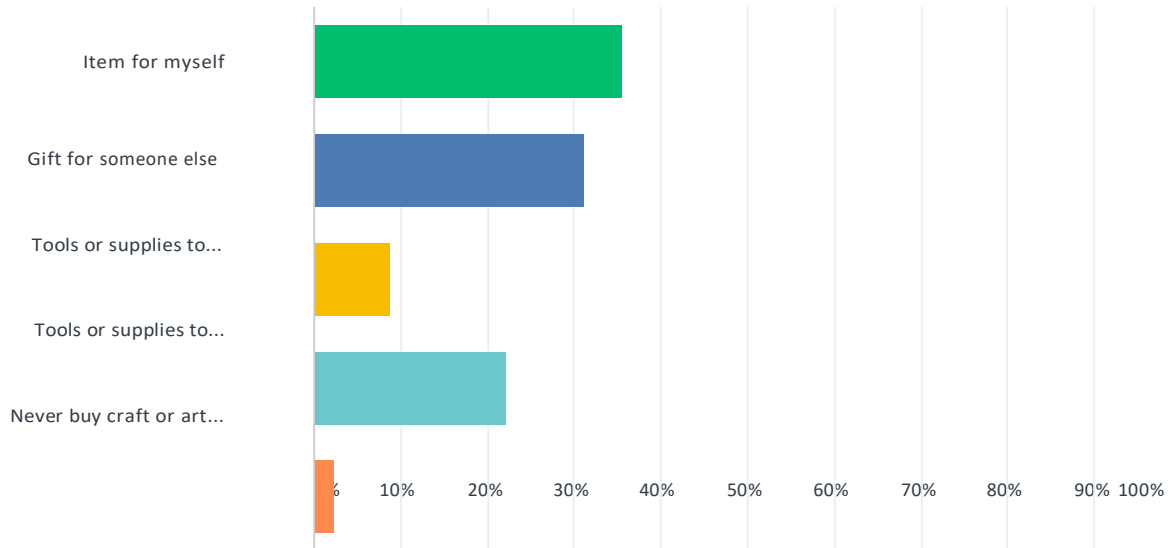


ANSWER CHOICES	RESPONSES	
Less than \$25,000	16.67%	7
\$25,000 to \$49,999	19.05%	8

\$50,000 to \$74,999	19.05%	8
\$75,000 to \$99,999	28.57%	12
\$100,000 and up	16.67%	7
TOTAL		42

Q5 What was your most recent purchase of crafts or arts from storefront, online or wherever?

Answered: 45 Skipped: 0



ANSWER CHOICES	RESPONSES
Item for myself	35.56% 16
Gift for someone else	31.11% 14
Tools or supplies to make something for myself	8.89% 4
Tools or supplies to make something for someone else	22.22% 10
Never buy craft or arts item	2.22% 1
TOTAL	45

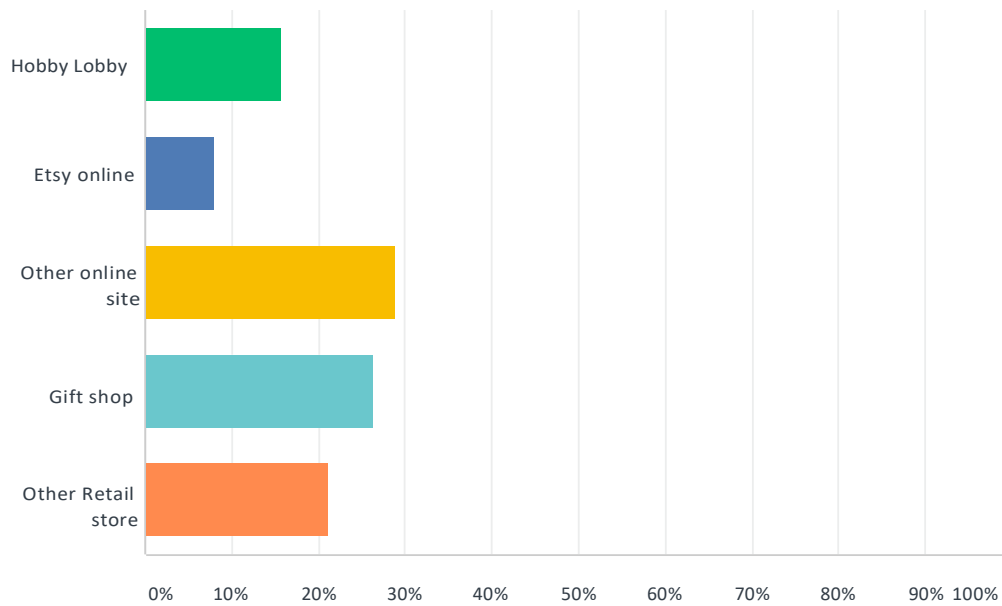
Q6 How much did you spend on your most recent purchase?

Answered: 44 Skipped: 1

ANSWER CHOICES	RESPONSES
Less than \$10	4.55% 2
\$11-\$20	29.55% 13
\$21-\$40	40.91% 18
\$41-\$75	13.64% 6
More than \$75	11.36% 5

Q7 Where did you purchase your most recent arts or craft item?

Answered: 38 Skipped: 7

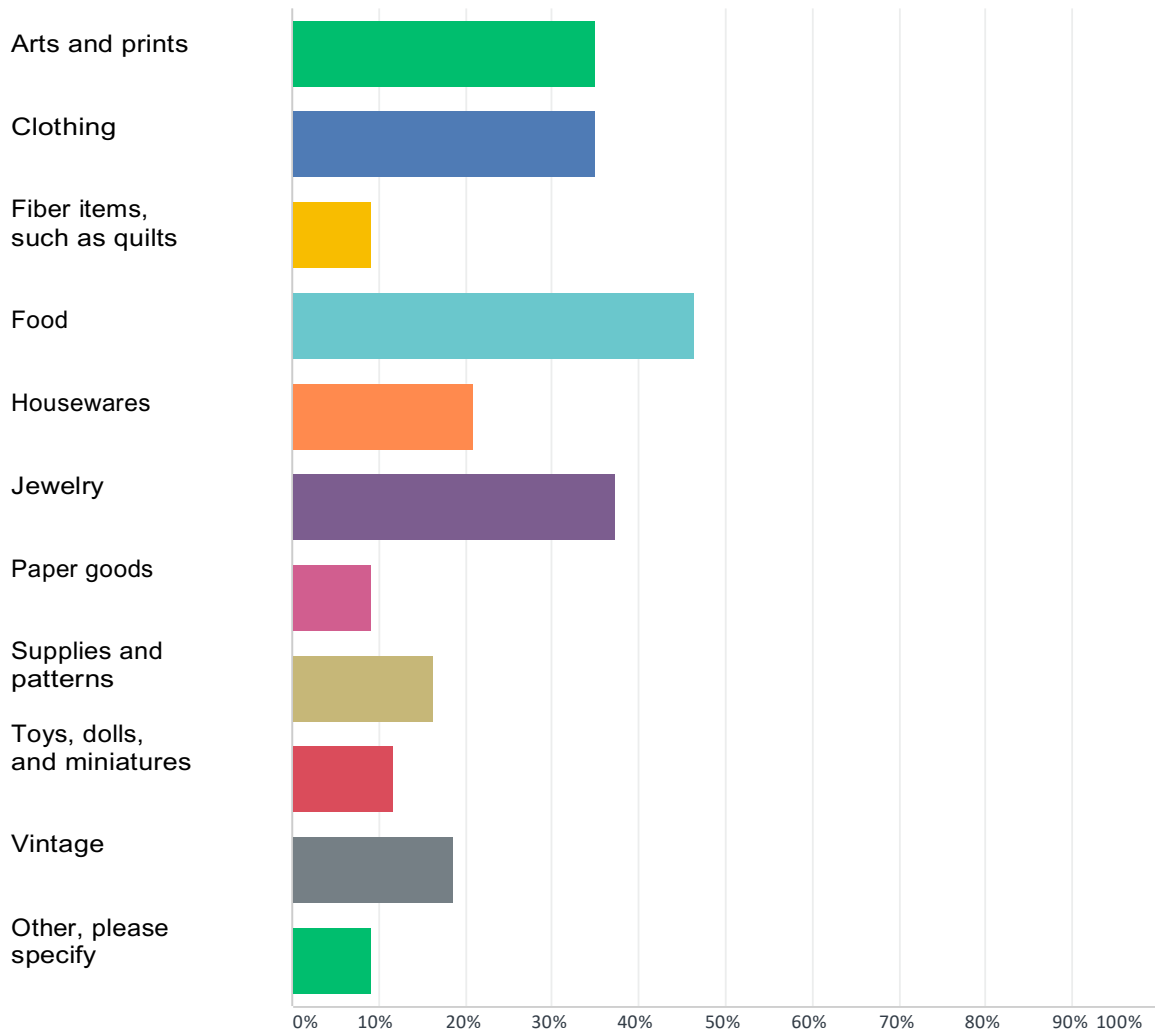


ANSWER CHOICES	RESPONSE S	
Hobby Lobby	15.79%	6
Etsy online	7.89%	3
Other online site	28.95%	11
Gift shop	26.32%	10
Other Retail store	21.05%	8
TOTAL		38

#	OTHER (PLEASE SPECIFY)	DATE
1	Tandy leather	8/7/2017 5:57 PM
2	Small business	8/7/2017 5:37 PM
3	Tailgate	7/19/2017 8:08 AM
4	Ozark Folkways	7/19/2017 4:08 AM
5	Heritage Festival, vendor	7/18/2017 8:40 PM
6	eBay.com	7/18/2017 7:00 PM
7	Craft show	7/18/2017 3:16 PM
8	British online site	7/18/2017 3:08 PM
9	Michaels	7/18/2017 2:09 PM
10	Pencils and sketch book	7/18/2017 1:21 PM
11	Amazon	7/18/2017 12:03 PM
12	Art festival	7/18/2017 11:58 AM
13	Craft Show	7/18/2017 10:25 AM

Q8 What types of arts and crafts items do you purchase most frequently? Select no more than three.

Answered: 43 Skipped: 2



ANSWER CHOICES	RESPONSES	
Arts and prints	34.88%	15
Clothing	34.88%	15
Fiber items, such as quilts	9.30%	4
Food	46.51%	20
Housewares	20.93%	9
Jewelry	37.21%	16
Paper goods	9.30%	4
Supplies and patterns	16.28%	7
Toys, dolls, and miniatures	11.63%	5

Vintage	18.60%	8
Other, please specify	9.30%	4

#	OTHER (PLEASE SPECIFY)	DATE
1	Steel, leather, wood. I'm a knifemaker zee	8/7/2017 5:57 PM
2	Cross stitching supplies and kits	7/18/2017 7:00 PM
3	Scrapbooking	7/18/2017 6:40 PM
4	Camping and canoeing supplies	7/18/2017 3:08 PM
5	eclectic	7/18/2017 10:34 AM
6	Pottery	7/18/2017 10:25 AM

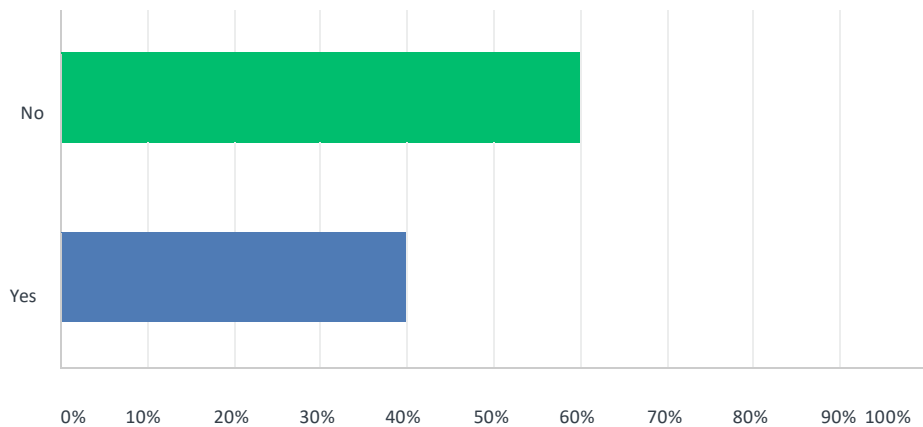
Q9 How often do you visit Eastern Ozark rivers, such as the Current River?

Answered: 43 Skipped: 2

ANSWER CHOICES	RESPONSES
Not at all	0.00% 0
Visited once or twice in total	4.65% 2
Once every year	23.26% 10
Multiple times most years	58.14% 25
I live near these beautiful rivers.	13.95% 6
TOTAL	43

Q10 Have you purchased locally-made crafts or art from the Eastern Ozarks? If so, please indicate what you purchased.

Answered: 45 Skipped: 0

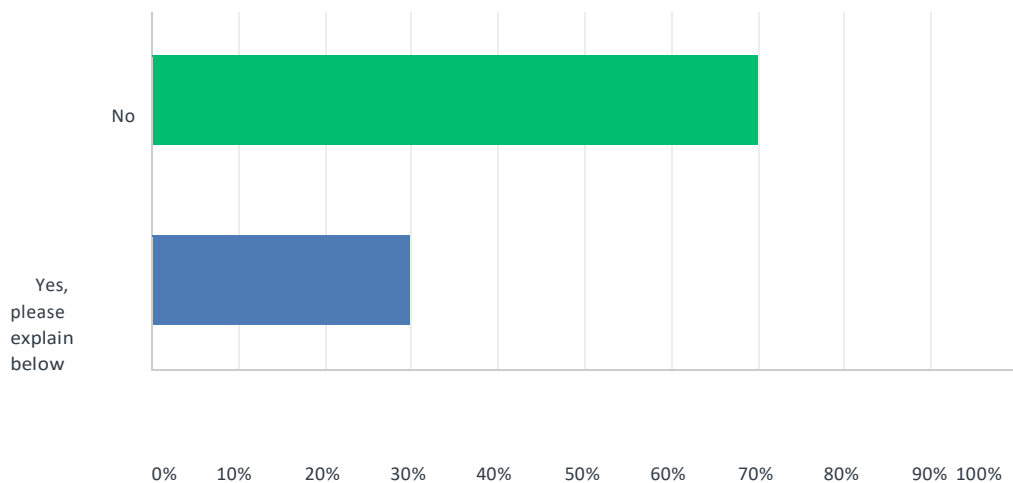


ANSWER CHOICES	RESPO NSES
No	60.00% 27
Yes	40.00% 18
TOTAL	45

#	IF YES, WHAT DID YOU PURCHASE? (PLEASE SPECIFY)	DATE
1	Stone candle holder	8/13/2017 2:25 AM
2	Wooden key chain with friend's name.	8/9/2017 6:35 AM
3	Pottery, knives, quilt, furniture	8/7/2017 6:55 PM
4	Food	7/26/2017 9:13 PM
5	Home decor items	7/21/2017 12:00 AM
6	Locker Hook Trivet	7/19/2017 3:37 PM
7	wood bowls	7/19/2017 8:08 AM
8	Jewelry	7/18/2017 8:56 PM
9	Woolen items	7/18/2017 8:40 PM
1	Tie dye tshirts	7/18/2017 5:06 PM
1	A hand-made canoe paddle with the Eleven Point River etched onto the blade	7/18/2017 3:08 PM
1	Repurposed shelf, Christmas ornaments	7/18/2017 2:09 PM
1	Different products at the Farmers Market in Doniphan	7/18/2017 1:10 PM
1	Blackberry jelly	7/18/2017 12:38 PM
1	Sun hat, T shirts or sweatshirts	7/18/2017 11:07 AM
1	A small pottery dish	7/18/2017 10:39 AM

Q11 Do you have any thoughts or comments you'd like to share about the development of an artisan innovation hub in the Eastern Ozarks?

Answered: 44 Skipped: 1



ANSWER CHOICES	RESPONSES	
No	70.45%	31
Yes, please explain below	29.55%	13
TOTAL		44

#	THOUGHTS?	DATE
1	Why a non-profit? Try to make some money at this.	8/13/2017 2:25 AM
2	We need a fiber artist's guild in this area.	8/9/2017 6:35 AM
3	I love shopping for local artistic items that I can offer as thank- you gifts for the folks that watch our pets.	8/7/2017 5:37 PM
4	The head-waters/upper Current River area could really benefit from this sort of thing; not just the Middle and Lower Current River Areas.	7/19/2017 3:37 PM
5	Not enough traffic for retail alone; need an online sales portal as well.	7/19/2017 8:08 AM
6	Include the Eminence area. Visit successful venues like Taos, New Mexico, and notice how every restaurant is an art gallery with works for sale on the walls. Think big. The possibilities are there.	7/19/2017 2:56 AM
7	I think this would be a fantastic thing to add to our community!	7/18/2017 7:00 PM
8	Think it is a great idea!	7/18/2017 5:06 PM
9	Spend most of our visits in Eminence area, would be nice to have artisans hub closer than Doniphan.	7/18/2017 2:09 PM
10	I would hope to see diversified items in order to reach a multitude of folks from different backgrounds. Not just the same ole T shirts and half wittled redneck looking stuff from days gone by. Our culture is so mixed and age groups are into so many different things but they are looking for quality, not hillbilly garbage you can still get at some of the junk stores around	7/18/2017 1:10 PM
11	Like many travelers, I like to purchase a Christmas ornament but have yet to find one in Eminence. I did find one at Echo Bluff but it wasn't anything special like a Ozark craftsman would make. I would also purchase books about local history, etc.	7/18/2017 12:38 PM
12	I love the idea and encourage you to collaborate with CAAW out of piedmont/Wayne county	7/18/2017 11:58 AM
13	Having an online marketplace for eastern Ozarks sellers would be a good place to get people to see more of the artisans work. If I visit Eminence MO, I may only see a storefront or shop with one or two persons work. If I had a way to look at that work later, not only could i see the work of the person I met in person, but also other artisans from the area.	7/18/2017 9:53 AM

Appendix D - National Establishment Time Series

CARTER COUNTY, MO												
Source: youreconomy.org												
	Establishment				Jobs				Sales			
	2004 BUSINESSES	% OF TOTAL	2015 BUSINESSES	% OF TOTAL	2004 JOBS	% OF TOTAL	2015 JOBS	% OF TOTAL	2004 SALES	% OF TOTAL	2015 SALES	% OF TOTAL
ALL	337	100	290	100	2,282	100	2,013	100	\$286M	100	\$468.5M	100
Self Employed	64	19	35	12.1	64	2.8	35	1.7	\$7.1M	2.5	\$95.8M	20.5
2-9 Employees	215	63.8	203	70	777	34	750	36.6	\$117.5M	41.1	\$143.1M	30.6
10-99 Employees	57	16.9	51	17.6	1,341	58.8	1,166	56.7	\$161.4M	56.4	\$229.5M	49
100-499 Employees	1	0.3	1	0.3	100	4.4	50	5	\$0	0	\$0	0
500+ Employees	0	0	0	0	0	0	0	0	\$0	0	\$0	0
RESIDENT	215	63.8	201	69.3	1,649	72.3	1,424	70.7	\$245.3M	85.8	\$454M	96.9
NON RESIDENT	21	6.2	15	5.2	143	6.3	118	5.9	\$39.4M	13.8	\$14.5M	3.1
NONCOM MERCIAL	101	30	74	25.5	490	21.5	471	23.4	\$1.2M	0.4	\$0	0

OREGON COUNTY, MO												
Source: youreconomy.org												
	Establishment				Jobs				Sales			
	2004 BUSINESSES	% OF TOTAL	2015 BUSINESSES	% OF TOTAL	2004 JOBS	% OF TOTAL	2015 JOBS	% OF TOTAL	2004 SALES	% OF TOTAL	2015 SALES	% OF TOTAL
ALL	440	100	453	100	2,961	100	3,577	100	\$478.1M	100	\$674.7M	100
Self Employed	103	23.4	89	19.6	103	3.5	89	2.5	\$11.8M	2.5	\$14.8M	2.2
2-9 Employees	278	63.2	289	63.8	1,001	33.8	1,078	28.8	\$171.7M	35.9	\$190.6M	28.2
10-99 Employees	58	13.2	71	15.7	1,732	58.5	1,746	49.5	\$294.6M	61.6	\$376.8M	55.8
100-499 Employees	1	0.2	4	0.9	125	4.2	635	19.3	\$0	0	\$92.6M	13.7
500+ Employees	0	0.2	0	0.9	0	0	0	0	\$0	0	\$0	0
RESIDENT	318	72.3	321	70.9	2,187	73.9	2,464	68.9	\$398.6M	83.4	\$528.1M	78.3
NON RESIDENT	36	8.2	42	9.3	430	14.5	724	20.2	\$79.4M	16.6	\$146.6M	21.7
NONCOM MERCIAL	86	19.5	90	19.9	344	11.6	389	10.9	\$168M	0	\$0	0

SHANNON COUNTY, MO												
Source: youreconomy.org												
	Establishment				Jobs				Sales			
	2004 BUSINESSES	% OF TOTAL	2015 BUSINESSES	% OF TOTAL	2004 JOBS	% OF TOTAL	2015 JOBS	% OF TOTAL	2004 SALES	% OF TOTAL	2015 SALES	% OF TOTAL

ALL	324	100	325	100	2,156	100	2,198	100	\$295.2M	100	\$746.1M	100
Self Employed	92	28.4	60	18.5	92	4.3	60	2.7	\$13.1M	4.4	\$264.1M	35.4
2-9 Employees	188	58	213	65.5	701	32.5	728	34.3	\$124.1M	42	\$187.9M	25.2
10-99 Employees	42	13	50	15.4	1,068	49.5	1,078	49.5	\$119.6M	40.5	\$253.1M	33.9
100-499 Employees	2	0.6	2	0.6	295	13.7	295	13.4	\$38.4M	13	\$40.9M	5.5
500+ Employees	0	0	0	0	0	0	0	0	\$0	0	\$0	0
RESIDENT	243	75	244	75.1	1,607	74.5	1,595	72.6	\$215.9M	73.1	\$614.4M	82.4
NON RESIDENT	15	4.6	17	5.2	116	5.4	300	13.6	\$79.3M	26.9	\$131.7M	17.6
NONCOMMERICAL	66	20.4	64	19.7	433	20.1	303	13.8	\$0	0	\$0	0

RIPLEY COUNTY, MO												
Source: youreconomy.org												
	Establishment				Jobs				Sales			
	2004 BUSINESS ES	% OF TOTAL	2015 BUSINESS ES	% OF TOTAL	2004 JOBS	% OF TOTAL	2015 JOBS	% OF TOTAL	2004 SALES	% OF TOTAL	2015 SALES	% OF TOTAL
ALL	567	100	544	100	3,697	100	3,594	100	\$481.9M	100	\$817M	100
Self Employed	148	26.1	104	19.1	148	4	104	2.9	\$24.8M	5.2	\$19.4M	2.4
2-9 Employees	338	59.6	365	67.1	1,174	31.8	1,254	35.1	\$208.4M	43.3	\$247.4M	30.3
10-99 Employees	76	13.4	71	13.1	1,735	46.9	1,743	47.8	\$167.5M	34.8	\$185.7M	22.7
100-499 Employees	5	0.9	4	0.7	640	17.3	460	14.2	\$81.2M	16.8	\$364.6M	44.6
500+ Employees	0	0	0	0	0	0	0	0	\$0	0	\$0	0
RESIDENT	418	73.7	408	75	2,728	73.8	2,558	71.2	\$439.4M	91.2	\$470.2M	57.5
NON RESIDENT	36	6.3	40	7.4	376	10.2	626	17.4	\$41.6M	8.6	\$346.9M	42.5
NONCOMMERICAL	113	19.9	96	17.6	593	16	410	11.4	\$890M	0.2	\$0	0

SHARP COUNTY, AR												
Source: youreconomy.org												
	Establishment				Jobs				Sales			
	2004 BUSINESSES	% OF TOTAL	2015 BUSINESSES	% OF TOTAL	2014 JOBS	% OF TOTAL	2015 JOBS	% OF TOTAL	2004 SALES	% OF TOTAL	2015 SALES	% OF TOTAL
ALL	935	100	1015	100	5,670	100	6,033	100	\$807.1M	100	\$1B	100
Self Employed	206	22	189	18.6	206	3.6	189	3.1	\$30.6M	3.8	\$138M	12.2
2-9 Employees	621	66.4	703	69.3	2,207	38.9	2,366	41.9	\$361.7M	44.8	\$474.1M	41.8

10-99 Employees	102	10.9	120	11.8	2,354	41.5	2,554	45.7	\$352.5M	43.7	\$465.1M	41
100-499 Employees	6	0.6	3	0.3	903	15.9	734	9.3	\$62.3M	7.7	\$56M	4.9
500+ Employees	0	0	0	0	0	0	0	0	\$0	0	\$0	0
RESIDENT	717	76.7	761	75	3,894	68.7	3,910	65	\$669.8M	83	\$892.9M	78.8
NON RESIDENT	76	8.1	101	10	949	16.7	1,109	18.4	\$137.3M	17	\$237.9M	21
NONCOMMERICAL	142	15.2	153	15.1	827	14.6	1,014	16.8	\$0	0	\$2.4M	0.2

RANDOLPH COUNTY, AR Source: youreconomy.org												
	Establishment				Jobs				Sales			
	2004 BUSINESSES	% OF TOTAL	2015 BUSINESSES	% OF TOTAL	2014 JOBS	% OF TOTAL	2015 JOBS	% OF TOTAL	2004 SALES	% OF TOTAL	2015 SALES	% OF TOTAL
ALL	627	100	732	100	5,681	100	6,216	100	\$877.3M	100	\$1.3B	100
Self Employed	125	19.9	96	13.1	125	2.2	96	1.5	\$23.3M	2.7	\$22.5M	1.7
2-9 Employees	403	64.3	518	70.8	1,501	26.4	1,709	30.8	\$337.3M	38.5	\$546.6M	42.5
10-99 Employees	92	14.7	112	15.3	2,435	42.9	2,638	45.7	\$282M	32.1	\$550.8M	42.8
100-499 Employees	5	0.8	5	0.7	620	10.9	740	13.9	\$122.1M	13.9	\$81.2M	6.3
500+ Employees	2	0.3	1	0.1	1,000	17.6	750	8	\$112.5M	12.8	\$86.6M	6.7
RESIDENT	454	72.4	529	72.3	3,744	65.9	3,635	58.5	\$707.1M	80.6	\$810.9M	63
NON RESIDENT	62	9.9	78	10.7	1,256	22.1	1,752	28.2	\$144.9M	16.5	\$476.6M	37
NONCOMMERICAL	111	17.7	125	17.1	681	12	829	13.3	\$25.2M	2.9	\$184M	0



Tapestry Segmentation Area Profile

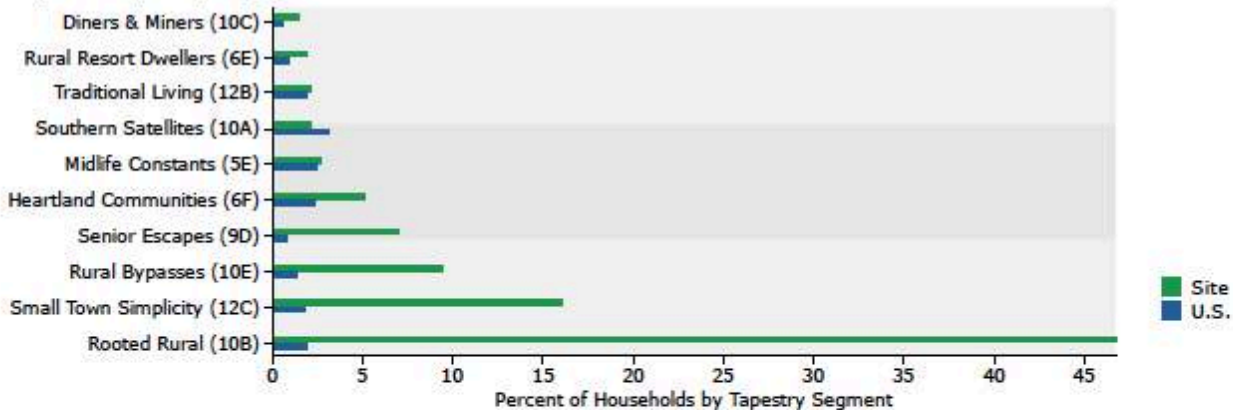
6 Counties 3
 Carter County, MO (29035) et al.
 Geography: County

Prepared by ESRI and MIC

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2016 Households		2016 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Rooted Rural (10B)	46.8%	46.8%	2.0%	2.0%	2331
2	Small Town Simplicity (12C)	16.2%	63.0%	1.9%	3.9%	852
3	Rural Bypasses (10E)	9.5%	72.5%	1.4%	5.3%	694
4	Senior Escapes (9D)	7.1%	79.6%	0.9%	6.2%	777
5	Heartland Communities (6F)	5.3%	84.9%	2.4%	8.6%	223
Subtotal		84.9%		8.6%		
6	Midlife Constants (5E)	2.8%	87.7%	2.5%	11.1%	110
7	Southern Satellites (10A)	2.2%	89.9%	3.2%	14.3%	70
8	Traditional Living (12B)	2.2%	92.1%	2.0%	16.3%	112
9	Rural Resort Dwellers (6E)	2.0%	94.1%	1.0%	17.3%	198
10	Diners & Miners (10C)	1.5%	95.6%	0.7%	18.0%	224
Subtotal		10.7%		9.4%		
11	The Elders (9C)	1.4%	97.0%	0.7%	18.7%	192
12	The Great Outdoors (6C)	1.1%	98.1%	1.6%	20.3%	71
13	Silver & Gold (9A)	1.0%	99.1%	0.8%	21.1%	134
14	Hardscrabble Road (8G)	0.9%	100.0%	1.2%	22.3%	72
Subtotal		4.4%		4.3%		
Total		100.0%		22.1%		452

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

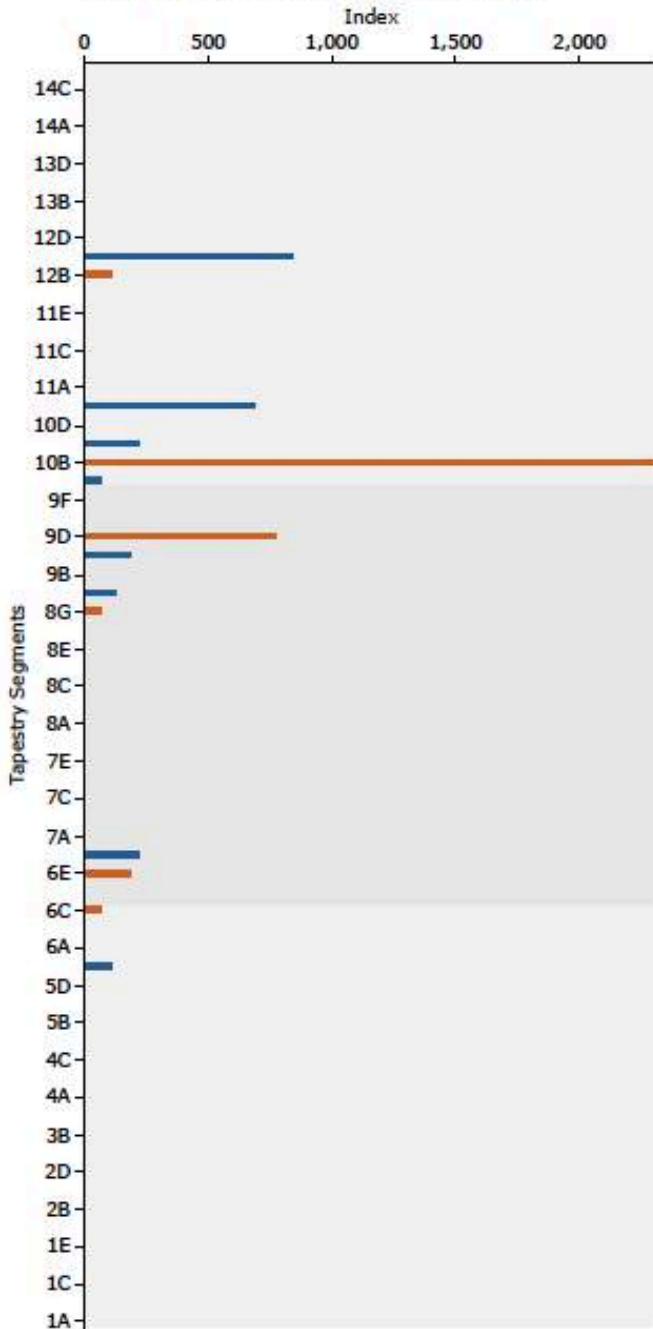
Source: Esri

Tapestry Segmentation Area Profile

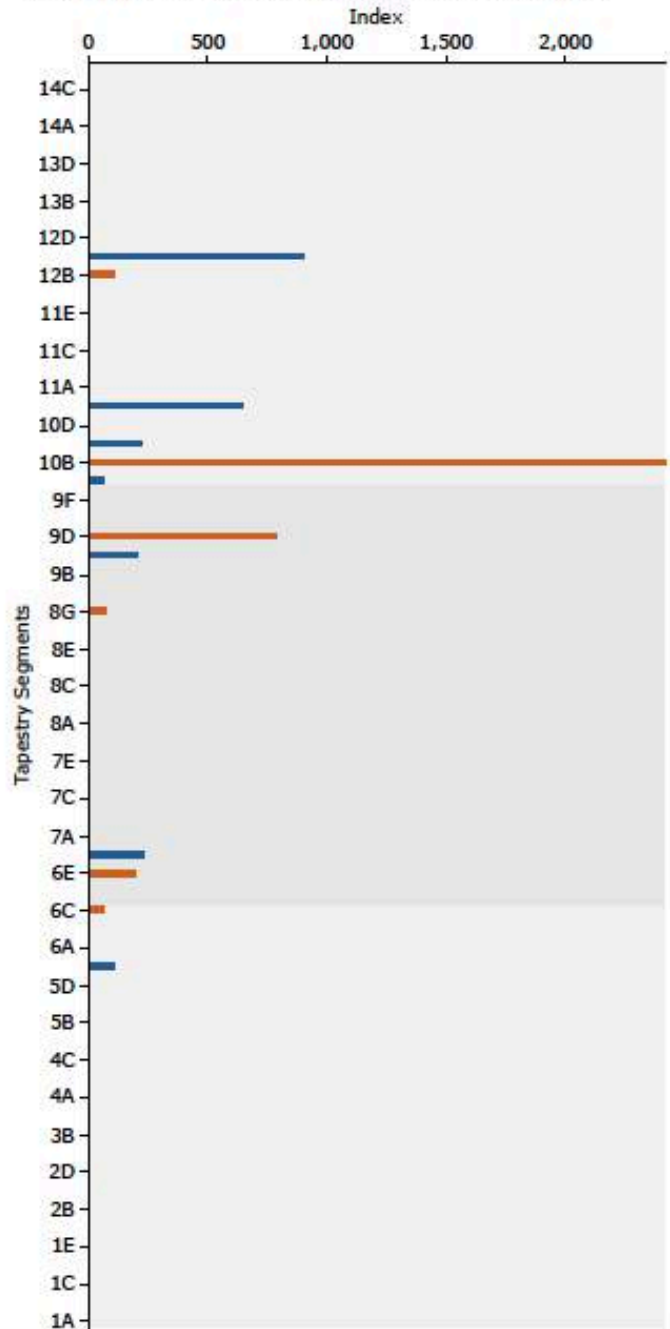
6 Counties 3
 Carter County, MO (29035) et al.
 Geography: County

Prepared by ESRI and MIC

2016 Tapestry Indexes by Households



2016 Tapestry Indexes by Total Population 18+



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

Tapestry Segmentation Area Profile

6 Counties 3
Carter County, MO (29035) et al.
Geography: County

Prepared by ESRI and MIC

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	31,255	100.0%		60,114	100.0%	
1. Affluent Estates	0	0.0%	0	0	0.0%	0
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	0	0.0%	0	0	0.0%	0
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
2. Upscale Avenues	0	0.0%	0	0	0.0%	0
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	0	0.0%	0	0	0.0%	0
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
3. Uptown Individuals	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	0	0.0%	0	0	0.0%	0
Soccer Moms (4A)	0	0.0%	0	0	0.0%	0
Home Improvement (4B)	0	0.0%	0	0	0.0%	0
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	869	2.8%	24	1,664	2.8%	25
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
In Style (5B)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	869	2.8%	110	1,664	2.8%	116
6. Cozy Country Living	2,619	8.4%	69	4,978	8.3%	69
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	346	1.1%	71	661	1.1%	72
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	630	2.0%	198	1,151	1.9%	203
Heartland Communities (6F)	1,643	5.3%	223	3,166	5.3%	240
7. Ethnic Enclaves	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The Index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

April 03, 2017

Tapestry Segmentation Area Profile

6 Counties 3
Carter County, MO (29035) et al.
Geography: County

Prepared by ESRI and MIC

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	31,255	100.0%		60,114	100.0%	
8. Middle Ground	278	0.9%	8	597	1.0%	10
City Lights (8A)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Handscrabble Road (8G)	278	0.9%	72	597	1.0%	84
9. Senior Styles	2,963	9.5%	165	5,344	8.9%	178
Silver & Gold (9A)	317	1.0%	134	558	0.9%	135
Golden Years (9B)	0	0.0%	0	0	0.0%	0
The Elders (9C)	437	1.4%	192	765	1.3%	216
Senior Escapes (9D)	2,209	7.1%	777	4,021	6.7%	790
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	18,773	60.1%	719	36,853	61.3%	727
Southern Satellites (10A)	688	2.2%	70	1,394	2.3%	73
Rooted Rural (10B)	14,639	46.8%	2,331	28,943	48.1%	2,423
Diners & Miners (10C)	473	1.5%	224	940	2.0%	234
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	2,973	9.5%	694	5,576	9.3%	652
11. Midtown Singles	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	5,753	18.4%	294	10,678	17.8%	300
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	688	2.2%	112	1,264	2.1%	115
Small Town Simplicity (12C)	5,065	16.2%	852	9,414	15.7%	912
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri

April 03, 2017

Tapestry Segmentation Area Profile

6 Counties 3
Carter County, MO (29035) et al.
Geography: County

Prepared by ESRI and MIC

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	31,255	100.0%		60,114	100.0%	
1. Principal Urban Center	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	0	0.0%	0	0	0.0%	0
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	966	3.1%	17	1,861	3.1%	18
In Style (5B)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	278	0.9%	72	597	1.0%	84
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	688	2.2%	112	1,264	2.1%	115
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri

April 03, 2017

Tapestry Segmentation Area Profile

6 Counties 3
Carter County, MO (29035) et al.
Geography: County

Prepared by ESRI and MIC

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	31,255	100.0%		60,114	100.0%	
4. Suburban Periphery	1,623	5.2%	16	2,987	5.0%	15
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	0	0.0%	0	0	0.0%	0
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
Soccer Moms (4A)	0	0.0%	0	0	0.0%	0
Home Improvement (4B)	0	0.0%	0	0	0.0%	0
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	869	2.8%	110	1,664	2.8%	116
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	317	1.0%	134	558	0.9%	135
Golden Years (9B)	0	0.0%	0	0	0.0%	0
The Elders (9C)	437	1.4%	192	765	1.3%	216
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	8,917	28.5%	304	16,601	27.6%	305
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	1,643	5.3%	223	3,166	5.3%	240
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	2,209	7.1%	777	4,021	6.7%	790
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	5,065	16.2%	852	9,414	15.7%	912
6. Rural	19,749	63.2%	372	38,665	64.3%	378
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	346	1.1%	71	661	1.1%	72
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	630	2.0%	198	1,151	1.9%	203
Southern Satellites (10A)	688	2.2%	70	1,394	2.3%	73
Rooted Rural (10B)	14,639	46.8%	2,331	28,943	48.1%	2,423
Diners & Miners (10C)	473	1.5%	224	940	2%	234
Rural Bypasses (10E)	2,973	9.5%	694	5,576	9.3%	652
Unclassified (15)	0	0.0%	0	0	0.0%	0

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April 03, 2017

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