

Local Traffic Analysis

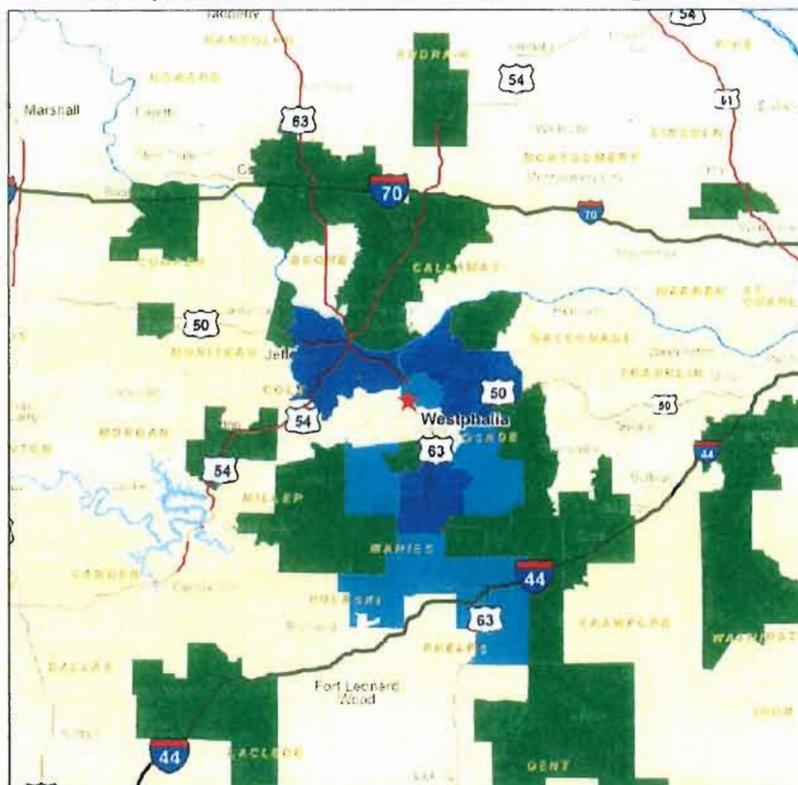
In Westphalia, data was collected from the several businesses. The two zip codes with the highest concentrations of customers account for 45% of Westphalia's entire customer base and are located in or adjacent to the town. 15 out of the total 452 customers that visited one of the locations were either foot traffic, had out-of-state plates, or their vehicle's plates did not return a residential zip code. Distributions on the map seem to support local residents and commuters as Westphalia's main customer base.

In Freeburg, the two highest zip codes are located in or adjacent to Freeburg and account for 64% of the town's entire customer base. 14 of the total 295 Freeburg customers were either foot traffic, had out-of-state plates, or their vehicle's plates did not return a residential zip code. These map distributions seem to favor mainly local residents as Freeburg's customer base, but commuters cannot be discounted.

In Vienna, 54% of Vienna's customer base resides in zip codes in or adjacent to the town. 30 of the total 875 customers were either foot traffic, had out of- state plates, or their vehicle's plates did not return a residential zip code. The widespread distribution of customers in Vienna's map suggests a fair amount of Lake of the Ozarks traffic. However, higher concentrations of customers in the map imply that Vienna's main customer base is local residents and commuters.

The following maps contain customer percentages based only on the license plate data that was collected. These statistics do not include every existing customer for these businesses.

Westphalia Customers, July 20 - August 16



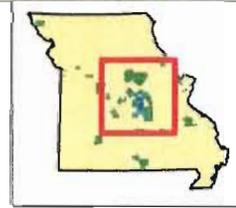
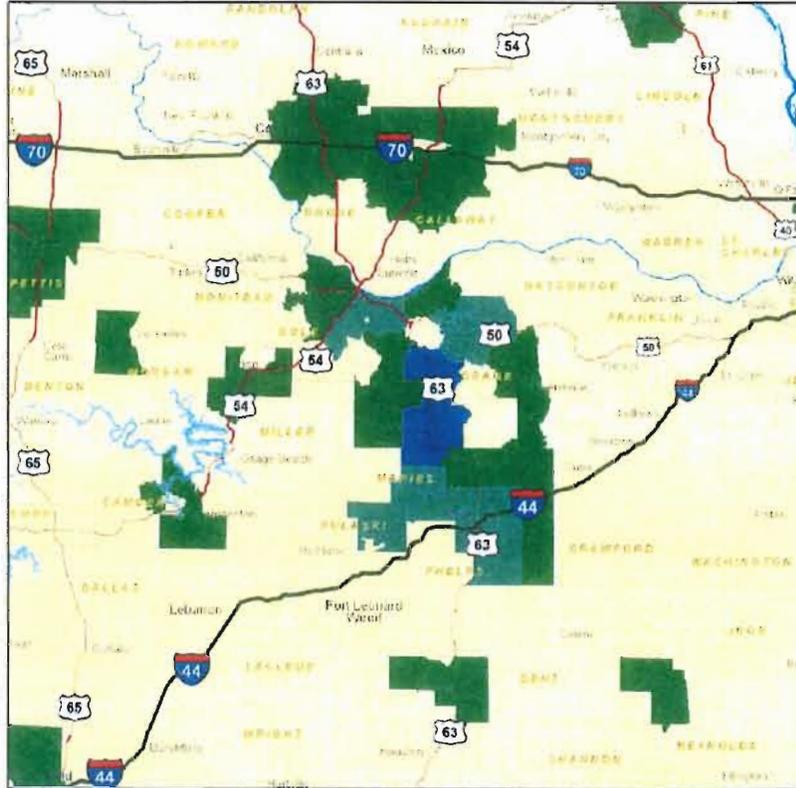
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Missouri Department of Transportation
2015-2016 Strategic Plan



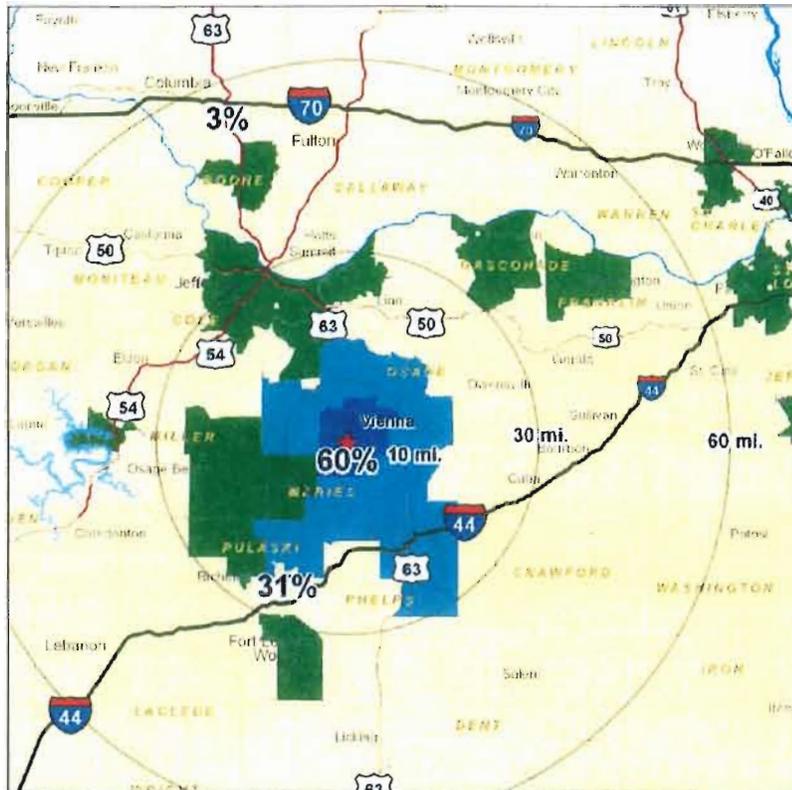
Freeburg Customers, July 20 - August 15



Missouri Department of Transportation
in partnership with Missouri Department of Environmental Conservation



Vienna Retail Customers, August 4 - August 15



Legend

★ Vienna
 Dollar General, Napa, Oak Harvest, and Americana Antiques
 Customers by Zipcode



* 2 customers were too far traffic and 1 had out-of-state plates



- 91% of Vienna's retail customer base is within 30 miles of the town, with only 3% located from 30 to 60 miles away.

Summary Review of Relevant Economic Studies

Poplar Bluff

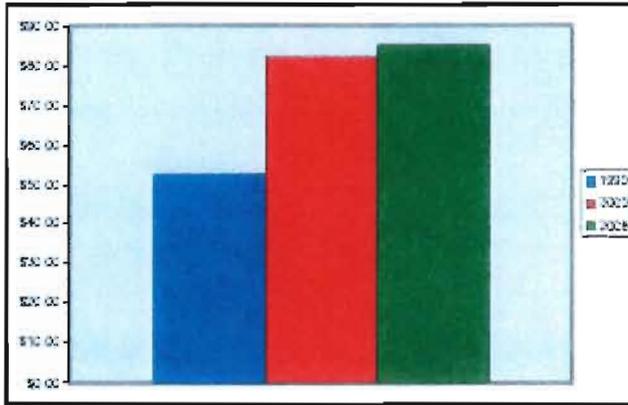
US Hwy 67 was relocated to bypass Poplar Bluff in June of 2001. The Missouri Department of Economic Development was tasked with evaluating the business development of the city following its bypass. Poplar Bluff is the county seat for Butler County, as well as the work destination for 32% of the employees of Butler and its five surrounding counties. In addition to this, the city is located at a major crossroad between US Hwy 60, which runs east-west from I-55 to Springfield, and US Hwy 67, which runs north to St. Louis and south to Arkansas. From the relocation's completion in June of 2001 to June of 2006, Poplar Bluff did not experience any profound reactions to the bypass. Businesses opened and closed primarily in the already-established business district. Despite the new route, Poplar Bluff still profited from an increase in taxable sales over the course of the years. When the Department of Economic Development made a site visit to Poplar Bluff in May of 2007, the circumstances had changed. Not only was there more real estate offerings beginning to be offered nearer the new route, but new businesses were also being opened closer to it. Under favorable conditions, a town will grow and expand. Naturally, one of the directions of this expansion would bring the town closer to the bypass.

Although Poplar Bluff is larger than Westphalia, Freeburg, Vienna, and Vichy, some of the same results might be expected for these towns from relocating US Hwy 63. The towns along Highway 63 have experienced increases in taxable sales and population, which gradually leads to expansion and growth.

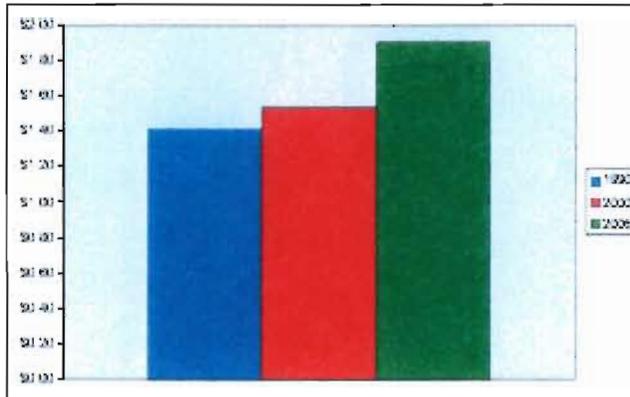
Eldon, New Bloomfield, and Urich were communities bypassed many years ago. A short review of their statistics shows that their economies are still thriving despite the relocations of the highways around them. Each town maintains a positive growth change in population and consistently increases the amount of taxable sales earned each year. Over the years, Eldon has

expanded farther and faster than the other two communities, but that can be attributed to it's proximity to the Lake of the Ozarks.

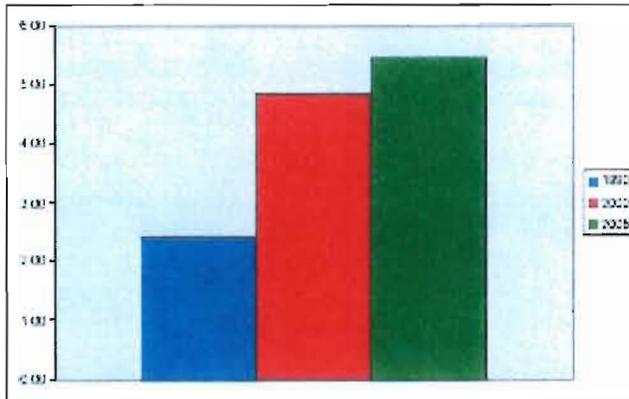
Eldon Taxable Sales (\$ Millions)



New Bloomfield Taxable Sales (\$ Millions)



Urich Taxable Sales (\$ Millions)



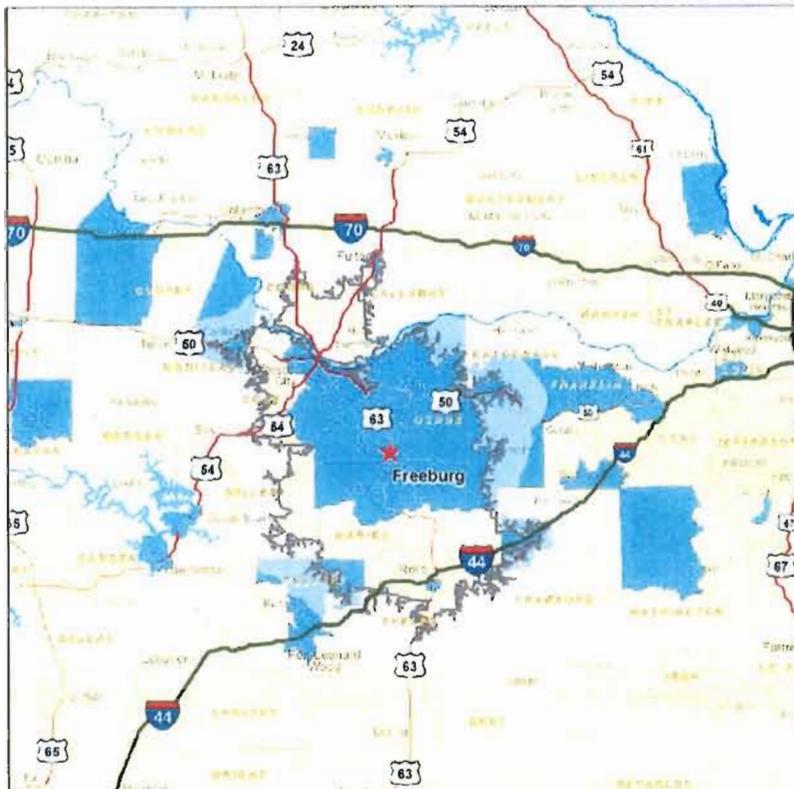
Other Studies

Many studies have been published from areas around the nation on the effects of relief routes and relocations on small and medium size communities. A summary of the results reveal several contributing factors to the economic growth in a community following route relocation. Increased traffic flow, short distance from the interchange (typically within 10 miles), growing community population, nearness to major urban centers, prior economic development, and nearness to the next interchange are all important attributes correlating with economic growth.

Economic Opportunities and Concerns

At first glance, the relocation may be a concern for all local businesses because it may allow potential customers to bypass their stores. However, the study done by the Missouri Department of Transportation previously discussed shows that the majority of customers are local residents. In addition to this, a safer highway with faster average speeds will likely draw new businesses to these communities. The following maps show an hour's worth of driving for each community, the areas that residents are currently commuting to, and an assumption on how far they may be able to travel in an hour after completion of the new highway. This area, displayed in gray, will open new employment opportunities for local residents.

US 63 Relocation Study - Freeburg

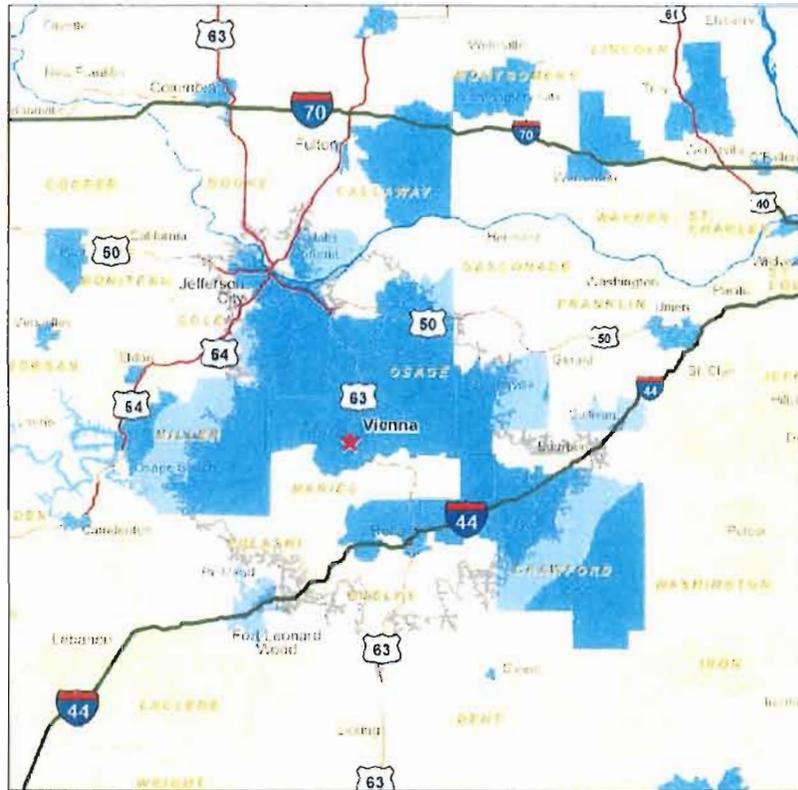


Legend

- ★ Freeburg
- 1 Hour Travel Distance
- Commuters from Freeburg
- -Travel Distance After US 63 Relocation*

*Assuming an approximate increase in average speed of 5 mph after highway is finished

US 63 Relocation Study - Vienna



Legend

- ★ Vienna
- 1 Hour Travel Distance
- Commuters from Vienna
- Travel Distance After US 63 Relocation*

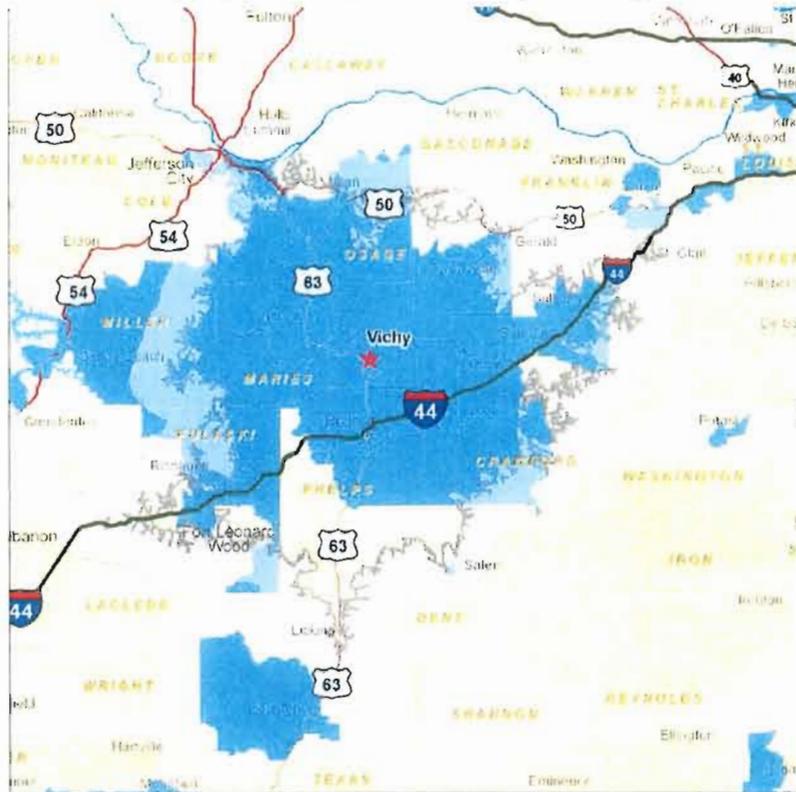
*Assuming an approximate increase in average speed of 5 mph after highway is finished



2010-2011 Missouri Economic Outlook
 Missouri Department of Transportation



US 63 Relocation Study - Vichy



Legend

- ★ Vichy
- 1 Hour Travel Distance
- Commuters from Vichy
- Travel Distance After US 63 Relocation

*Assuming an approximate increase in average speed of 5 mph after highway is finished

Route Relocations and Communities



Expectations and Strategies for Growth

Knowing what to expect prior to route relocations is essential to the community and policymakers in terms of strategy development. Based on an evaluation of the communities below, the following are potential community concerns, benefits, and applied strategies.

Business and Community Benefits

- Increase in Safety
- Reduction in Travel Times/Cost
- Elimination of Truck Traffic Through City
- Noise Reduction
- Continued Community and Economic Development
- Increase in Population
- Increase in Market Area
- Reduction in Shipping Costs

Common Route Relocation Concerns

- Impact to Downtown Businesses
- Access Roads to the City
- Property Division Along New Route
- Decreased Business Exposure
- City Infrastructure Expansion to New Route
- Ability to Relocate to New Route
- Distance from the New Route to the City

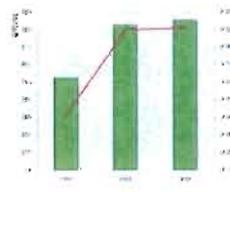
Community Strategies

- Participation in Highway Planning
- Signage Along Route for City Businesses
- Advertising Campaigns for Businesses
- Marketing Campaigns for City Tourism
- Business Recruitment
- Commercial Zoning Near New Route
- Tax Incentives

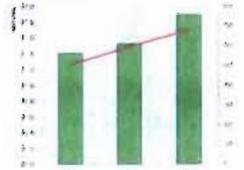
Population and Taxable Sales Growth for Missouri Communities with Route Relocations

Each of these communities has experienced a route relocation. A review of community statistics shows that their economies are thriving with the relocations of the highways around them. Each community maintains positive growth in population and consistently increases the amount of taxable sales earned each year.

Eldon Taxable Sales & Population



New Bloomfield Taxable Sales & Population



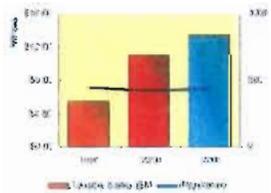
Urish Taxable Sales & Population



Note: Taxable sales data not available prior to 1990.

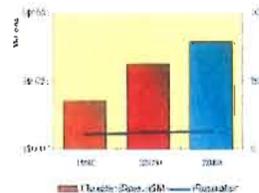
Population and Taxable Sales Growth for Communities in the Route 63 Study Area

Freeburg Taxable Sales & Population



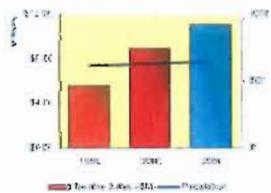
Tax Rates: State - 4.225, Osage Co. - 5.225, Freeburg - 6.725

Viduy Taxable Sales & Population



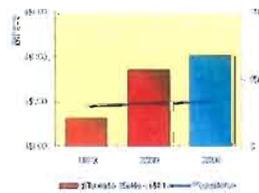
Tax Rates: State - 4.225, Maries Co. - 5.725, Viduy - 5.725

Vienna Taxable Sales & Population



Tax Rates: State - 4.225, Maries Co. - 5.725, Vienna - 7.725

Westphalia Taxable Sales & Population



Tax Rates: State - 4.225, Osage Co. - 5.225, Westphalia - 6.225

Summary

Vienna

The relocation of Hwy 63 is expected to be no more than a mile away from where it currently exists. Drive times will improve access to the cities of Rolla, Linn, and Jefferson City. Access to Interstate 44 and Highways 50 and 54 will also be improved. An hour drive time distance would expand to include Fort Leonard Wood, Sullivan, and nearly reach the boundary of Fulton. While 29.2% of Vienna's residents work in Vienna, a majority of residents commute to the surrounding cities for work. Over 15% of the Vienna residents are employed by federal, state, or local government entities. The supply of these jobs in Vienna is lower than what exists, so it is most likely that those residents are commuting to cities such as Jefferson City and Fort Leonard Wood where the concentration of this type of employment is higher. Commuting pattern data does indeed show some individuals do work in those areas. Although nearly 70% of Vienna residents leave the city to work elsewhere, it should be noted that the day population, in terms of workers, changes very little. Commuters outside the Vienna area also travel to Vienna for work. The predominant employing industries are involved in manufacturing, wholesale, healthcare, and education. Shortening the drive time between area cities will make it more attractive for residents to continue to live in Vienna and will make it easier for others to visit and work in Vienna. Current economic activity is primarily regional with regard to customer base. Vienna area residents make up 60% of overall retail customers, 50% of overall healthcare patients, and 30% of all lodging and food services customers. The customer base within a 30-mile radius accounts for 91% of retail, 75% of healthcare, and 68% of lodging and food service customers. With access roads being less than a mile from Vienna from the Hwy 63 interchange, the current local market can continue to be served as drive times to the city will increase by less than a minute. Road improvements however will lessen the drive time on Hwy 63, which in most cases will offset any increase caused by the relocation away from the city of Vienna. Based on previous relocation studies, Vienna exhibits all the characteristics that can

contribute to further economic growth in a community following relocation. Traffic flows are expected to increase to over 9800 vehicles by 2035. The roadway will offer access to the city and be a short distance away from local businesses. The community population is expected to continue to increase over the next 5 years by .41%. Current regional tourism is also strong with regard to community picnics and weekly cattle auctions. All of these factors are positive aspects for this community. Certain strategies can encourage growth in the community and keep existing businesses from relocating. Vienna could benefit from signage along the new Hwy 63, marketing campaigns for tourism and local businesses, recruitment of new firms due to improved drive times to the interstate and metro areas. Other opportunities may include the conversion of farmland near the roadway to commercial real estate or promoting residential development in the area.

Westphalia

The relocation of Hwy 63 is expected to be no more than a mile away from where it currently exists. Drive times will improve access to the cities of Linn, Columbia, Fulton, and Jefferson City. Access to Interstates 44 and 70 and Highways 50 and 54 will also be improved. An hour drive time distance would expand to include Rolla, North Columbia, Gerald, Hermann, and nearly extend to the Lake of the Ozarks. While 13.4% of Westphalia's residents work in Westphalia, a majority of residents commute to the surrounding cities for work. Over 17% of the Westphalia residents are employed by federal, state, or local government entities. The supply of these jobs in Westphalia is very much lower than what exists, so it is most likely that those residents are commuting to cities such as Jefferson City and Columbia where the concentration of this type of employment is higher. Commuting pattern data does show some individuals do work in those areas. Other area of commuting concentration include northeast Boone County, Licking, Mexico, Union, and as far out as Potosi, Troy, and Kirkwood. The worker day population of Westphalia falls to 69.3% of the total residential worker population. Commuters

outside the Westphalia area also travel to Westphalia for work. The predominant employing industries are involved in education, healthcare and social assistance, and manufacturing. Shortening the drive time between area cities will make it more attractive for residents to continue to live in Westphalia and will make it easier for others to visit and work in Westphalia. Current economic activity is primarily regional with regard to customer base. Westphalia area residents make up 70% of overall retail customers, 62% of gas station customers, 55% of dental care, and 79% of banking customers. The customer base within a 30 mile radius accounts for 84% retail, 80% gas station, 94% dental care, and 89% banking. With access roads being less than a mile from Westphalia from Hwy 63 and close to five miles from Hwy 50, the current local market can continue to be served as drive times to the city will increase by less than a minute. Road improvements however will lessen the drive time on Hwy 63, which in most cases will offset any increase caused by the relocation away from the city of Westphalia. Based on previous relocation studies, Westphalia exhibits all the characteristics that can contribute to further economic growth in a community following relocation. Traffic flows are expected to increase to nearly 11,900 vehicles by 2035. The interchange will offer access to the city and be a short distance away from local businesses. The community population is expected to continue to increase over the next 5 years by 76%. Drive times will be shorter for major highways and Jefferson City will be less than 15 minutes away. Current regional tourism is also strong with regard to community picnics and tractor pulls. Also, amenities such as the soccer fields can be a draw for several local areas. All of these factors are positive aspects for this community. Certain strategies can encourage growth in the community and keep existing businesses from relocating. Westphalia could benefit from signage along the new Hwy 63, marketing campaigns for tourism and local businesses, recruitment of new firms due to improved drive times to the interstates, highways, and metro areas; particularly Jefferson City. As Jefferson City grows to the east, opportunities may exist for Westphalia to increase its tax base. Ashland, which is roughly the same distance from Jefferson City, is a good example of a town that has seen

tremendous growth from close proximity to an urban area. Ashland differs from Westphalia, in that it neighbors two larger cities, however, similar strategies of commercial zoning and residential development could be successfully utilized

Freeburg

The relocation of Hwy 63 is expected to be no more than a mile away from where it currently exists. Drive times will improve access to the cities of Linn, Rolla, and Jefferson City. Access to Interstate 44 and Highways 50 and 54 will also be improved. An hour drive time distance would expand to include Fulton, California, Ashland, Bourbon, and nearly extend to Fort Leonard Wood. While 18.2% of Freeburg's residents work in Freeburg, a majority of residents commute to the surrounding cities for work. Nearly 15% of the Freeburg residents are employed by federal, state, or local government entities. The supply of these jobs in Freeburg is limited compared with what exists, so it is most likely that those residents are commuting to cities such as Jefferson City and Fort Leonard Wood where the concentration of this type of employment is higher. Commuting pattern data does show many individuals do work in those areas.

Commuters are also traveling outside of Freeburg to jobs involving education and health care.

Other area of commuting concentration include Washington, Owensville, Fulton, and as far out as Kirkwood. The working day population of Freeburg increases to nearly double the size of the total residential working population. Commuters outside the Freeburg area make up a substantial portion of employment in Freeburg. The predominant employing industries are involved in manufacturing, retail, and wholesale. Shortening the drive time between area cities will make it more attractive for residents to continue to live in Freeburg and will make it easier for others to visit and work in Freeburg. Current economic activity is primarily regional with regard to customer base. Freeburg and Vienna area residents make up 74% of overall retail customers, 49% of gas station customers, 69% of manufacturing traffic, and 100% of banking customers. The customer base within a 30 mile radius accounts for 88% retail, 69% gas station,

96% manufacturing traffic, and 100% banking. With access roads being less than a mile to Freeburg from highway 63, the current local market can continue to be served as drive times to the city will increase by less than a minute. Road improvements however will lessen the drive time on Hwy 63, which in most cases will offset any increase caused by the relocation away from the city of Freeburg. Based on previous relocation studies, Freeburg exhibits all the characteristics that can contribute to further economic growth in a community following relocation. Traffic flows are expected to increase to over 7,800 vehicles by 2035. The new roadway will offer access to the city and be a short distance away from local businesses. The community population is expected to continue to increase over the next 5 years by .89%. Drive times will be shorter for major highway interchanges, Jefferson City, and Rolla. Current regional tourism is also strong with regard to the community Labor Day picnic and nearby river float trips. All of these factors are positive aspects for this community. Certain strategies can encourage growth in the community and keep existing businesses from relocating. Freeburg could benefit from signage along the new Hwy 63, marketing campaigns for tourism and local businesses, recruitment of new firms due to improved drive times to the interstate, highways, and metro areas. Freeburg's doubling daytime population is unique to this region. Strategies of commercial zoning and residential development could be successfully utilized in Freeburg to attract and convert more of the daytime working population into residential population.

Vichy

The relocation of Hwy 63 is expected to be at most 1.5 miles away from where it currently exists. Drive times will improve access to the cities of Rolla, Licking, Sullivan, and Fort Leonard Wood. Access to Interstate 44 and Highways 50 will also be improved. An hour drive time distance would expand to include Linn, Jefferson City, Lebanon, Salem, Union, and nearly extend to St. Charles County. Only 1.7% of Vichy's residents work in Vichy, so nearly all of the residents commute to the surrounding cities for work. Commuters are traveling outside of Vichy to jobs involving manufacturing, retail, education, and health care. Areas of commuting

concentration are spread mainly throughout the local region including cities of Linn, Vienna, Rolla, Fort Leonard Wood, Jefferson City, Owensville, Salem, Potosi, Piedmont, and Pacific. The working day population of Vichy decreases to 12.9% of the total residential working population. Commuters outside the Vichy area make up a substantial portion of employment in Vichy. The predominant employing industries are involved in transportation, warehousing, and construction. Shortening the drive time between area cities will make it more attractive for residents to continue to live in Vichy and will make it easier for others to visit and work in Vichy. With access roads being less than a mile and a half from Vichy from, the current local market can continue to be served as drive times to the city will increase by less than two minutes. Road improvements however will lessen the drive time on Hwy 63, which in most cases will offset any increase caused by the relocation away from the Vichy community. Based on previous relocation studies, Vichy exhibits all the characteristics that can contribute to further economic growth in a community following relocation. Traffic flows are expected to increase to over 9,400 vehicles by 2035. The interchange will offer access to the city and be a short distance away from local businesses. The community population is the fastest growing in the area and is expected to increase over the next 5 years by 1.03%. Drive times will be shorter for major highways and cities such as Rolla and Fort Leonard Wood. The local airport can also play a role in future economic growth. All of these factors are positive aspects for this community. Certain strategies can encourage growth in the community and keep existing businesses from relocating. Vichy could benefit from signage along the new Hwy 63, marketing campaigns for local businesses, and recruitment of new firms due to improved drive times to the interstate, highways, and metro areas.

1 Missouri Dept. of Transportation, comments from Public Meetings held over the past year.

2 All GIS maps created with ESRI's ArcGIS software suite and ESRI's Business Analyst ArcGIS Extension.

3 <http://www.ruralmissouri.org/03pages/03febWestphalia.html>

4 2002 Census of Agriculture, United States Department of Agriculture, National Agricultural Statistics Service at [http://www.nass.usda.gov/Data and Statistics/index.asp](http://www.nass.usda.gov/Data_and_Statistics/index.asp)

5 2007 Reference USA Database of Businesses, InfoUSA at <http://www.referenceusa.com>

6 Local Employment Dynamics data, US Census.

7 Data queried from <http://www.dorx.mo.gov/publicreports/>.

8 <http://www.osagecountymo.com/freeburg.htm>

9 <http://www.viennamo.com/>

10 Data collected by Missouri Dept. of Transportation and identified by Missouri Dept. of Revenue then sent to Dept. of Economic Development for analysis.

11 Summary of study done by Missouri Dept. of Economic Development in May of 2007 covering a business analysis of the US Hwy 67 relocation.

12 Handy, S.L., Kubly, S., Jarett, J. and Srinivasan, S. "Economic Effects of Highway Relief Routes on Small and Medium-Size Communities." Center for Transportation Research-The University of Texas at Austin, April 2000.

13 "Effects of Highway Bypasses on Rural Communities and Small Urban Areas," Research Results Digest, NCHRP, 1996.

14 Leong, D. and Weisbrod, G. "Summary of Highway Bypass Studies," Economic Development Research Group, December 2000.