

## At A Glance:



# Pelican Rapids Market Area Profile, May 2008

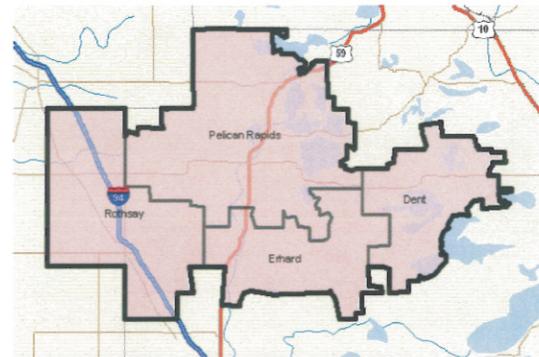
Results based on an analysis from multiple datasources, compiled using Business Analyst from ESRI ([www.esri.com](http://www.esri.com)).

See Appendix 1 :Data and Methodology for more details.

### How large is the local retail market ?

9,315 people living in 3,692 households, whose retail goods and services purchases account for \$78 Million.

The *local* market area for this analysis includes the zip codes of Pelican Rapids (56572), Erhard (56534), Dent (56528), and Rothsay (56579).



### What do we know about households in the Pelican Rapids trade area?

Median Household Income	\$43,029	Median Net Worth	\$96,373
Median Disposable Income	\$34,147	Median Age	43.5
Households with related children	32.3%	Households with persons 65+	30.0%

### What do we know about housing in the Pelican Rapids trade area ?

Seasonal Housing Units	3,035 or 42% of total	Renter Occupied Units	546 or 7.6% of total
Median home value	\$144,739		

### What types of customers live in the Pelican Rapids trade area ?

	Rural Resort Dwellers	Prairie Living	Simple Living
Number of Households	1,443	1,134	552
Percent of Households	41.1%	32.3%	15.7%

### Demographics

Median Age	46.0 years	40.5 years	40.1 years
Median Household Income	\$45,600	\$41,400	\$27,516
Median Home Value	\$207,203	\$96,300	\$106,474

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# Pelican Rapids Market Area Profile

## *Introduction:*

The University of Minnesota Extension created the Market Area Profile (MAP) program to assist Minnesota communities to develop their retail and service sectors. The authors intend existing businesses, potential businesses, and economic development organizations to use the information in this report to better serve their market and develop individual business and main street strategies.

University of Minnesota Extension staff created the report through sound secondary data and analysis compiled chiefly through Business Analyst, a GIS software program from ESRI.

## *Report:*

Created: May, 2008 by Ryan Pesch and John Bennett, Extension Educators, University of Minnesota Extension

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## Pull Factors

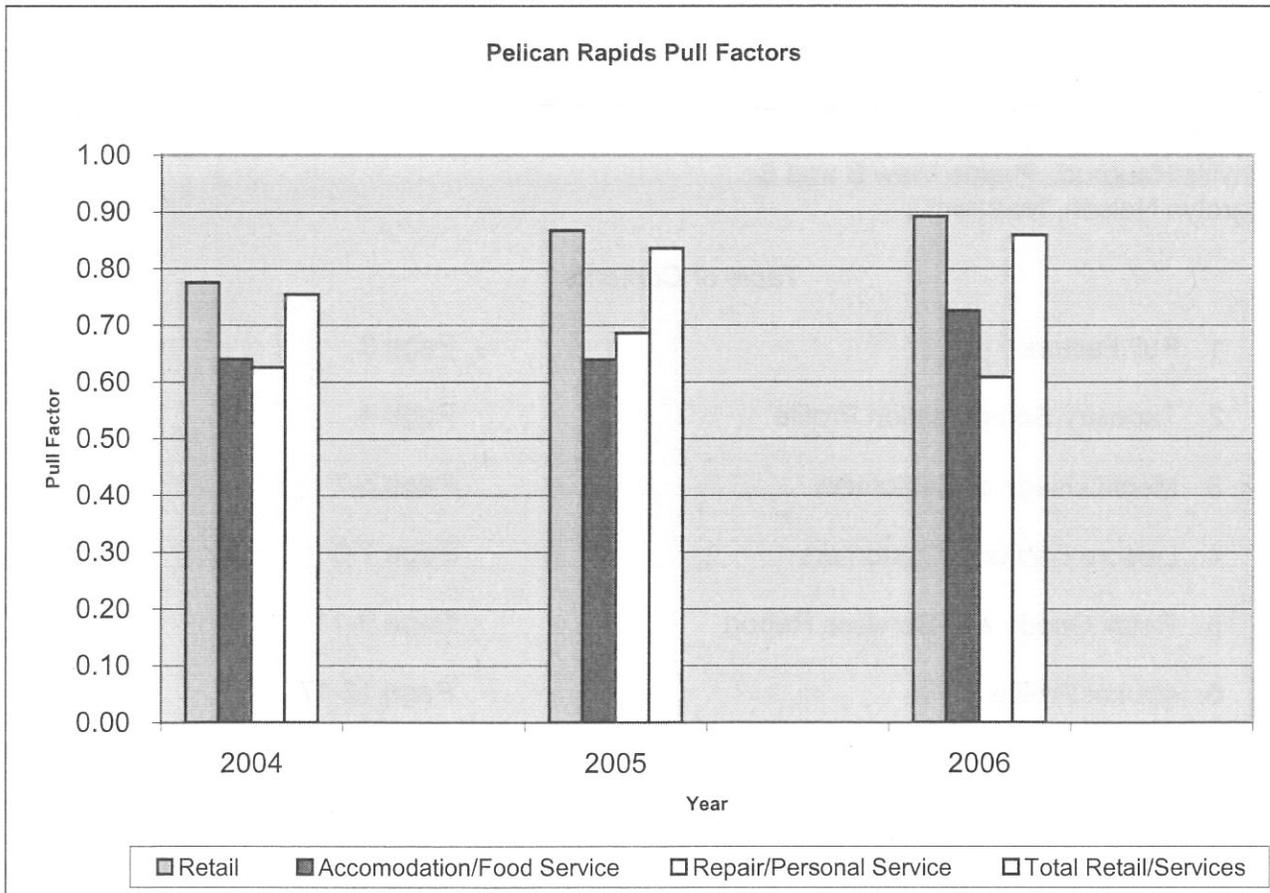
Created from 2004, 2005, and 2006 sales tax data reported by businesses in Pelican Rapids, MN Department of Revenue, and based on the population of the Pelican Rapids of 2,424; 2,409; and 2,416 respectively.  
(See Appendix 1 for more details).

### Data from MN Revenue for Pelican

NAICS	2004		2005		2006	
	Gross Sales	Number	Gross Sales	Number	Gross Sales	Number
Retail (44+45)	\$ 25,000,853	42	\$ 29,293,464	44	\$ 30,425,596	40
Accomodation/Food (72)	\$ 2,297,986	13	\$ 2,432,875	13	\$ 2,888,426	15
Repair/Personal Services (81)	\$ 1,237,932	8	\$ 3,432,244	9	\$ 3,078,712	10
Total Retail/Services	\$ 1,237,932	17	\$ 1,432,485	16	\$ 1,387,488	13
<b>Total Retail</b>	<b>\$ 28,536,771</b>	<b>72</b>	<b>\$ 33,158,824</b>	<b>73</b>	<b>\$ 34,701,510</b>	<b>68</b>
<b>All Categories</b>	<b>\$ 75,639,434</b>	<b>116</b>	<b>\$ 82,771,677</b>	<b>115</b>	<b>\$ 79,258,327</b>	<b>100</b>

### Pull Factors

NAICS	Pull Factor	Pull Factor	Pull Factor
	2004	2005	2006
Retail (44+45)	0.78	0.87	0.89
Accomodation/Food (72)	0.64	0.64	0.73
Repair/Personal Services (81)	0.63	0.69	0.61
Total Retail/Services	0.75	0.84	0.86





# Tapestry Segmentation Profile

Community Tapestry classifies US neighborhoods into 65 market segments grouped together according to a detailed national profile. Data sources include Census 2000, Axiom's InfoBase consumer database, and Mediamark Research's Doublebase national customer survey (see appendix 1 for more details).

	Number	Percent
<b>Total</b>	3,692	100.0%
31 Rural Resort Dwellers	1,443	41.1%
37 Prairie Living	1,134	32.3%
57 Simple Living	552	15.7%
25 Salt of the Earth	379	10.8%
17 Green Acres	184	5.0%

### 3. Rural Resort Dwellers

Favoring milder climates and pastoral settings, Rural Resort Dwellers live in rural nonfarm areas. These small, growing communities mainly consist of single-family and mobile homes, with a significant inventory of seasonal housing. This somewhat older market has a median age of 46.0 years. Most households consist of married couples with no children living at home or singles who live alone. A higher than average proportion of residents are self-employed and work from home. The median household income is \$45,600. Modest living and simple consumer tastes describe this market. The rural setting calls for more riding lawn mowers and satellite dishes. Lawn maintenance and gardening is a priority, and households own a plethora of tools and equipment. Many households own or lease a truck. Residents enjoy boating, hunting, fishing, snorkeling, canoeing, and listening to country music.

### 7. Prairie Living

Agriculture plays an important part of the Prairie Living economy; small, family-owned farms dominate this stable market, located mainly in the Midwest. Two-thirds of the households are married-couple families; the median age is 40.5 years. Homeownership is at 81 percent; the median home value is \$96,300. Although single-family dwellings are characteristic of these communities, 11 percent of the households live in mobile homes. Approximately 36 percent of the housing units were built before 1940. These residents are big country music fans, and enjoy hunting, fishing, target shooting, and horseback riding. They work on their vegetable gardens, vehicles, and home projects. Many are members of church boards or civic clubs, and get involved in civic issues. Because cable TV can be unavailable in these rural areas, many households have a satellite dish. Families with pet cats or dogs are common.

### 8. Simple Living

Simple Living neighborhoods are found throughout the U.S., in urban outskirts or suburban areas. Half of the households are singles who live alone or share housing, and 32 percent consist of married-couple families. The median age is 40.1 years. Approximately one-third of householders are aged 65 years or older; 19 percent are aged 75 years or older. Housing is a mix of single-family dwellings and multiunit buildings of varying stories. Some seniors live in congregate housing (assisted living). Fifty-five percent of households are occupied by renters. Approximately 40 percent of households receive Social Security benefits. Younger residents enjoy going out dancing, while seniors prefer going to bingo night. To stay fit, residents play softball and volleyball. Many households do not own a PC, cell phone, or DVD player. Residents watch a lot of TV, especially sitcoms and science fiction shows.

### 25. Salt of the Earth

A rural or small town lifestyle best describes the Salt of the Earth market. The median age is 40.4 years. Labor force participation is higher than the U.S. level and unemployment is lower. Above average numbers of employed residents work in the manufacturing, construction, mining, and agricultural industries. The median household income is \$48,800. Households are dominated by married-couple families who live in single-family dwellings, with homeownership at 86 percent. 28 percent of the households own three or more vehicles. Most homes own a truck; many own a motorcycle. Residents are settled, hardworking, and self-reliant, taking on small home projects, as well as vehicle maintenance. Families often own two or more pets, usually dogs or cats. Residents enjoy fishing, hunting, target shooting, attending country music concerts and auto races, and flying kites.

### 17. Green Acres

A "little bit country", Green Acres residents live in pastoral settings of developing suburban fringe areas, mainly in the Midwest and South. The median age is 39.9 years. Married couples with and without children comprise most of the households, live in single-family dwellings. This upscale market has a median household income of \$62,300 and a median home value of \$179,700. These do-it-yourselfers maintain and remodel their homes, painting, installing carpet, or adding a deck, and own all the necessary tools to accomplish these tasks. They also take care of their lawn and gardens, again with the right tools. Vehicles of choice are motorcycles and full-size pickup trucks. For exercise, residents ride their bikes and go water skiing, canoeing, and kayaking. Other activities include birdwatching, power boating, target shooting, hunting, and attending auto races.



# Tapestry Segmentation Area Profile: Media

## How do you reach your customers?

Based on a national study of the adult population called *The Survey of the American Consumer*, by Mediamark Research. Conducted since 1979, 25,000 households are added each year to the sample.

### 2006 Households

	31 Rural Resort Dwellers 1,443	37 Prairie Living 1,134	57 Simple Living 552	Total Households 3,692	Total Percentage
<b>Totals</b>					
<b>Television</b>					
Light viewer of daytime TV	10%	12%	11%	404	11%
Medium viewer of daytime TV	9%	9%	11%	348	9%
Heavy viewer of daytime TV	7%	7%	11%	294	8%
Light viewer of primetime TV	27%	25%	15%	860	23%
Light-medium viewer of primetime TV	16%	19%	18%	674	18%
Medium viewer of primetime TV	16%	18%	19%	670	18%
HH watched 15+ hours of cable TV last week	53%	43%	59%	1881	51%
Watched 1-9 hours of cable TV last week	75%	62%	79%	2635	71%
Watched 10-20 hours of cable TV last week	23%	21%	28%	840	23%
Watched 21+ hours of cable TV last week	4%	6%	7%	184	5%
HH has cable TV available in neighborhood	63%	56%	98%	2502	68%
HH subscribes to cable TV	43%	37%	73%	1711	46%
HH subscribes to digital cable TV	7%	14%	9%	362	10%
HH has pay TV	29%	20%	24%	930	25%
HH has satellite dish	36%	36%	10%	1143	31%
HH watched cable TV last week	74%	65%	79%	2655	72%
<b>Magazine</b>					
Light magazine reader	25%	28%	27%	932	25%
Light-medium magazine reader	20%	27%	19%	833	23%
Medium magazine reader	19%	22%	17%	748	20%
Medium-heavy magazine reader	15%	12%	20%	582	16%
Heavy magazine reader	22%	10%	17%	613	17%
Read airline magazines	5%	3%	4%	138	4%
Read automotive magazines	13%	12%	14%	491	13%
Read baby magazines	5%	5%	4%	178	5%
Read boating magazines	6%	2%	3%	146	4%
Read bridal magazines	3%	4%	7%	141	4%
Read business/finance magazines	13%	9%	15%	449	12%
Read computer magazines	4%	5%	7%	187	5%
Read Epicurean magazines	5%	2%	2%	130	4%
Read fishing/hunting magazines	20%	21%	12%	706	19%
Read gardening magazines	8%	5%	4%	220	6%
Read general editorial magazines	49%	40%	44%	1668	45%
Read health magazines	14%	10%	10%	436	12%
Read home service magazines	41%	37%	32%	1422	39%
Read motorcycle magazines	4%	4%	5%	155	4%
Read music magazines	9%	11%	12%	374	10%
Read news - weekly magazines	39%	23%	37%	1234	33%
Read parenthood magazines	12%	10%	12%	428	12%
Read science/technology magazines	7%	5%	5%	207	6%
Read sports magazines	12%	7%	13%	381	10%
Read travel magazines	14%	5%	8%	340	9%
Read women`s fashion magazines	3%	3%	7%	135	4%

	31 Rural Resort Dwellers	37 Prairie Living	57 Simple Living	Total Households	Total Percentage
<b>Totals</b>	1,443	1,134	552	3692	
<b>Newspaper</b>					
Light newspaper reader	28%	25%	18%	906	25%
Light-medium newspaper reader	22%	19%	22%	767	21%
Medium newspaper reader	14%	18%	19%	625	17%
Medium-heavy newspaper reader	18%	20%	21%	722	20%
Heavy newspaper reader	18%	18%	20%	691	19%
Read any daily newspaper	44%	48%	51%	1736	47%
Read one daily newspaper	36%	37%	42%	1394	38%
Read two or more daily newspapers	8%	11%	9%	342	9%
Read any Sunday newspaper	53%	55%	61%	2061	56%
Read one Sunday newspaper	44%	47%	54%	1740	47%
Read two or more Sunday newspapers	9%	9%	7%	315	9%
Read newspaper: business/finance section	34%	24%	24%	1055	29%
Read newspaper: classified section	35%	40%	41%	1428	39%
Read newspaper: comics section	35%	34%	29%	1238	34%
Read newspaper: editorial page section	39%	40%	31%	1382	37%
Read newspaper: fashion section	13%	13%	12%	465	13%
Read newspaper: food/cooking section	29%	20%	25%	941	25%
Read newspaper: general news section	60%	61%	60%	2256	61%
Read newspaper: home/furnishings/gardening	24%	19%	18%	792	21%
Read newspaper: movie listings/reviews section	20%	17%	21%	739	20%
Read newspaper: science & technology section	23%	12%	15%	641	17%
Read newspaper: sports section	37%	38%	32%	1340	36%
Read newspaper: travel section	22%	12%	13%	635	17%
Read newspaper: TV/radio listings section	27%	21%	22%	902	24%
<b>Radio</b>					
Light radio listener	25%	25%	23%	873	24%
Light-medium radio listener	21%	17%	18%	711	19%
Medium radio listener	19%	23%	16%	729	20%
Medium-heavy radio listener	19%	17%	23%	690	19%
Heavy radio listener	17%	19%	21%	709	19%
Radio format listen to: adult contemporary	24%	15%	17%	712	19%
Radio format listen to: all news	2%	1%	2%	61	2%
Radio format listen to: all talk	2%	2%	3%	73	2%
Radio format listen to: alternative	4%	5%	7%	192	5%
Radio format listen to: classic hits	3%	3%	3%	124	3%
Radio format listen to: classic rock	11%	8%	9%	370	10%
Radio format listen to: classical	4%	1%	3%	100	3%
Radio format listen to: contemporary hit radio	10%	12%	19%	475	13%
Radio format listen to: country	33%	49%	25%	1358	37%
Radio format listen to: Hispanic	2%	5%	7%	129	3%
Radio format listen to: jazz	1%	1%	3%	52	1%
Radio format listen to: news/talk	10%	9%	8%	364	10%
Radio format listen to: oldies	11%	10%	9%	381	10%
Radio format listen to: public	5%	1%	2%	102	3%
Radio format listen to: religious	3%	7%	6%	182	5%
Radio format listen to: rock	11%	5%	11%	346	9%
Radio format listen to: soft adult contemporary	4%	3%	5%	144	4%
Radio format listen to: sports	2%	3%	2%	82	2%
Radio format listen to: urban	5%	7%	7%	225	6%
Radio format listen to: variety/other	9%	10%	9%	315	9%
Radio listening: auto racing (NASCAR)	8%	8%	5%	276	7%
Radio listening: baseball playoffs/World Series	9%	9%	7%	321	9%
Radio listening: baseball (regular season)	11%	13%	9%	410	11%
Radio listening: basketball (college)	5%	10%	5%	251	7%
Radio listening: basketball (pro)	4%	7%	5%	179	5%
Radio listening: football (college)	7%	14%	8%	355	10%

	31 Rural Resort Dwellers	37 Prairie Living	57 Simple Living	Total Households	Total Percentage
<b>Totals</b>	<b>1,443</b>	<b>1,134</b>	<b>552</b>	<b>3692</b>	
Radio listening: football-Monday night (pro)	4%	8%	5%	220	6%
Radio listening: football-weekend (pro)	9%	10%	10%	357	10%
Radio listening: golf	2%	3%	3%	98	3%
Radio listening: ice hockey	2%	2%	3%	93	3%
Radio listening: NFL playoffs/Superbowl	5%	7%	5%	214	6%
Listen to Radio: 6:00 am - 10:00 am weekday	48%	55%	52%	1938	53%
Listen to Radio: 10:00 am - 3:00 pm weekday	34%	36%	35%	1330	36%
Listen to Radio: 3:00 pm - 7:00 pm weekday	38%	39%	45%	1512	41%
Listen to Radio: 7:00 pm - midnight weekday	15%	13%	15%	539	15%
Listen to Radio: midnight - 6:00 am weekday	8%	4%	6%	220	6%
Listen to Radio: 6:00 am - 10:00 am weekend	36%	38%	31%	1325	36%
Listen to Radio: 10:00 am - 3:00 pm weekend	38%	30%	41%	1350	37%
Listen to Radio: 3:00 pm - 7:00 pm weekend	29%	28%	33%	1092	30%
Listen to Radio: 7:00 pm - midnight weekend	11%	10%	23%	487	13%
Listen to Radio: midnight - 6:00 am weekend	5%	5%	6%	191	5%



## Tapestry Segmentation Area Profile: Leisure

*What activities are your customers involved in?*

Based on a national study of the adult population called *The Survey of the American Consumer*, by Mediamark Research. Conducted since 1979, 25,000 households are added each year to the sample.

	2006 Households				
	31 Rural Resort Dwellers	37 Prairie Living	57 Simple Living	Total Households	Total Percentage
<b>Totals</b>	<b>1,443</b>	<b>1,134</b>	<b>552</b>	<b>3,692</b>	
<b>Hobbies</b>					
Cooked for fun in last 12 months	19%	13%	16%	585	16%
Did crossword puzzle in last 12 months	14%	14%	12%	530	14%
Flew a kite in last 12 months	3%	4%	4%	144	4%
Did furniture refinishing in last 12 months	4%	4%	2%	145	4%
Did indoor gardening/plant care in last 12 months	23%	17%	17%	737	20%
Played musical instrument in last 12 months	6%	5%	8%	230	6%
Did painting/drawing in last 12 months	9%	7%	6%	275	7%
Did photography in last 12 months	14%	11%	15%	478	13%
Read book in last 12 months	50%	37%	38%	1578	43%
Surfed the Internet in last 12 months	23%	20%	20%	824	22%
Played video game in last 12 months	10%	11%	10%	407	11%
Did woodworking in last 12 months	9%	5%	6%	284	8%

	31 Rural Resort Dwellers	37 Prairie Living	57 Simple Living	Total Households	Total Percentage
<b>Totals</b>	<b>1,443</b>	<b>1,134</b>	<b>552</b>	<b>3692</b>	
<b>Entertainment</b>					
Attended adult education course in last 12 months	9%	3%	7%	242	7%
Attended auto show in last 12 months	8%	5%	6%	262	7%
Went to bar/night club in last 12 months	21%	19%	24%	782	21%
Went to beach in last 12 months	22%	12%	19%	686	19%
Attended dance performance in last 12 months	3%	2%	3%	93	3%
Danced/went dancing in last 12 months	10%	15%	15%	437	12%
Dined out in last 12 months	60%	50%	46%	2002	54%
Dine out < once a month	6%	7%	4%	205	6%
Dine out once a month	6%	4%	4%	197	5%
Dine out 2-3 times a month	17%	16%	10%	552	15%
Dine out once a week	17%	7%	10%	446	12%
Dine out 2+ times per week	12%	12%	12%	431	12%
Attended movies in last 6 months	50%	47%	54%	1861	50%
Attended movies in last 90 days: < once a month	27%	25%	24%	973	26%
Attended movies in last 90 days: once a month	7%	8%	10%	292	8%
Attended movies in last 90 days: 2-3 times a month	6%	4%	8%	218	6%
Attended movies in last 90 days: once/week or more	2%	2%	2%	78	2%
Prefer to see movie after second week of release	22%	20%	22%	793	21%
Went to museum in last 12 months	14%	7%	7%	392	11%
Attended music performance in last 12 months	20%	15%	26%	731	20%
Attended country music performance in last 12 mo	7%	6%	6%	232	6%
Attended rock music performance in last 12 months	7%	6%	10%	262	7%
Went to live theater in last 12 months	14%	12%	10%	457	12%
Visited a theme park in last 12 months	13%	12%	19%	560	15%
Went to zoo in last 12 months	8%	6%	9%	295	8%
Played backgammon in last 12 months	1%	2%	2%	64	2%
Played billiards/pool in last 12 months	8%	7%	9%	289	8%
Played bingo in last 12 months	5%	5%	8%	196	5%
Did birdwatching in last 12 months	12%	7%	6%	313	8%
Played board game in last 12 months	15%	13%	12%	537	15%
Played cards in last 12 months	20%	26%	20%	824	22%
Played chess in last 12 months	5%	4%	4%	153	4%
<b>Membership</b>					
Member of business club	4%	3%	2%	112	3%
Member of charitable organization	6%	10%	5%	267	7%
Member of church board	6%	11%	3%	252	7%
Member of fraternal order	7%	4%	5%	210	6%
Member of religious club	7%	11%	8%	319	9%
Member of school or college board	1%	1%	4%	61	2%
Member of union	5%	4%	7%	199	5%
Member of veterans club	6%	6%	5%	206	6%
<b>Gambling</b>					
Gambled at casino in last 12 months	19%	13%	17%	603	16%
Gambled at casino 6+ times in last 12 months	2%	1%	3%	70	2%
Gambled in Atlantic City in last 12 months	1%	1%	3%	63	2%
Gambled in Las Vegas in last 12 months	4%	3%	3%	122	3%
Attended horse races in last 12 months	2%	1%	3%	73	2%
Bought lottery ticket in last 12 months	37%	32%	42%	1329	36%
Bought lottery ticket in last 12 mo: Daily Drawing	6%	3%	7%	171	5%
Bought lottery ticket in last 12 mo: Instant Game	18%	13%	19%	620	17%
Bought lottery ticket in last 12 mo: Lotto Drawing	25%	24%	27%	919	25%
Played lottery: <2 times in last 30 days	8%	10%	9%	339	9%
Played lottery: 2-5 times in last 30 days	11%	8%	17%	429	12%
Played lottery: 6+ times in last 30 days	18%	13%	16%	567	15%



## Retail Goods and Services Expenditures

Expenditure data are derived from the national 2001, 2002, and 2003 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2006 and 2011 (See appendix 1 for more details).

Summary	2006	2011
Population	9,315	9,428
Households	3,692	3,760
Families	2,623	2,621

### Expenditures Summary

Total Retail and Service Expenditures for all households	\$77,661,749
Average Retail and Service Expenditures per Household	\$21,035.14

	Spending Potential Index	Average Local Household Expenditures	Average National Household Expenditures	Total Local Expenditures
<b>Apparel and Services</b>	49	\$1,338.11	\$2,722.18	\$4,940,305
Men's	53	\$271.31	\$515.49	\$1,001,676
Women's	46	\$427.38	\$929.74	\$1,577,879
Children's	62	\$277.65	\$444.68	\$1,025,086
Footwear	28	\$141.95	\$498.14	\$524,097
Watches & Jewelry	58	\$108.63	\$186.90	\$401,048
Apparel Products and Services	76	\$111.19	\$147.23	\$410,519
<b>Computer</b>				
Computers and Hardware for Home Use	68	\$153.44	\$225.72	\$566,503
Software and Accessories for Home Use	65	\$20.49	\$31.49	\$75,637
<b>Entertainment &amp; Recreation</b>	78	\$2,585.89	\$3,306.13	\$9,547,093
<b>Fees and Admissions</b>	59	\$357.86	\$608.90	\$1,321,236
Membership Fees for Clubs	62	\$101.49	\$163.58	\$374,705
Fees for Participant Sports, excl. Trips	62	\$70.50	\$113.53	\$260,268
Admission to Movie/Theatre/Opera/Ballet	56	\$83.11	\$147.66	\$306,835
Admission to Sporting Events, excl. Trips	60	\$34.24	\$57.16	\$126,417
Fees for Recreational Lessons	54	\$68.53	\$126.97	\$253,011
<b>TV/Video/Sound Equipment</b>	73	\$799.38	\$1,091.90	\$2,951,329
Community Antenna or Cable Television	79	\$473.86	\$599.87	\$1,749,484
Color Televisions	65	\$82.25	\$126.40	\$303,663
VCRs, Video Cameras, and DVD Players	71	\$28.53	\$40.10	\$105,344
Video Cassettes and DVDs	73	\$38.04	\$51.83	\$140,428
Video Game Hardware and Software	67	\$23.77	\$35.69	\$87,771
Satellite Dishes	91	\$2.01	\$2.20	\$7,411
Rental of Video Cassettes and DVDs	66	\$40.57	\$61.85	\$149,769
Sound Equipment	63	\$106.54	\$167.99	\$393,364
Rental and Repair of TV/Sound Equipment	64	\$3.82	\$5.97	\$14,095
Pets	102	\$422.56	\$414.82	\$1,560,101
Toys and Games	77	\$150.44	\$195.86	\$555,424
Recreational Vehicles and Fees	112	\$456.31	\$408.92	\$1,684,711
Sports/Recreation/Exercise Equipment	63	\$142.88	\$225.65	\$527,519
Photo Equipment and Supplies	71	\$100.21	\$141.40	\$369,986
Reading	71	\$156.23	\$218.68	\$576,787
<b>Food</b>	77	\$6,368.52	\$8,257.12	\$23,512,562
<b>Food at Home</b>	81	\$3,964.37	\$4,920.42	\$14,636,456
Bakery and Cereal Products	80	\$578.59	\$722.65	\$2,136,138
Meats, Poultry, Fish, and Eggs	82	\$1,067.06	\$1,294.30	\$3,939,583
Dairy Products	81	\$434.67	\$534.26	\$1,604,815
Fruits and Vegetables	76	\$653.16	\$856.87	\$2,411,454
Snacks and Other Food at Home	81	\$1,230.90	\$1,512.34	\$4,544,466
<b>Food Away from Home</b>	72	\$2,404.15	\$3,336.70	\$8,876,106
Alcoholic Beverages	67	\$384.16	\$574.71	\$1,418,397
Nonalcoholic Beverages at Home	84	\$355.51	\$421.36	\$1,312,544



# Retail Goods and Services Expenditures

	Spending Potential Index	Average Local Household Expenditures	Average National Household Expenditures	Total Local Expenditures
<b>Financial</b>				
Investments	42	\$1,977.35	\$4,673.66	\$7,300,364
Vehicle Loans	91	\$5,413.93	\$5,951.68	\$19,988,214
<b>Health</b>				
Nonprescription Drugs	86	\$97.84	\$113.82	\$361,237
Prescription Drugs	102	\$580.84	\$568.52	\$2,144,459
Eyeglasses and Contact Lenses	82	\$70.31	\$85.88	\$259,593
<b>Home</b>				
Mortgage Payment and Basics	67	\$5,460.26	\$8,177.29	\$20,159,289
Maintenance and Remodeling Services	71	\$1,268.39	\$1,783.84	\$4,682,883
Maintenance and Remodeling Materials	92	\$333.86	\$363.85	\$1,232,596
Utilities, Fuel, and Public Services	81	\$3,428.94	\$4,231.61	\$12,659,658
<b>Household Furnishings and Equipment</b>				
Household Textiles	69	\$91.40	\$132.94	\$337,447
Furniture	69	\$427.83	\$619.14	\$1,579,563
Floor Coverings	57	\$47.70	\$84.24	\$176,124
Major Appliances	83	\$236.01	\$284.51	\$871,343
Housewares	64	\$65.53	\$102.73	\$241,927
Small Appliances	80	\$29.77	\$37.25	\$109,908
Luggage	56	\$5.71	\$10.24	\$21,099
Telephones and Accessories	27	\$15.23	\$55.88	\$56,246
<b>Household Operations</b>				
Child Care	52	\$216.27	\$415.32	\$798,480
Lawn and Garden	99	\$429.77	\$434.16	\$1,586,727
Moving/Storage/Freight Express	59	\$30.72	\$52.18	\$113,424
Housekeeping Supplies	82	\$614.29	\$753.22	\$2,267,971
<b>Insurance</b>				
Owners and Renters Insurance	86	\$379.40	\$441.62	\$1,400,760
Vehicle Insurance	80	\$1,104.43	\$1,375.70	\$4,077,542
Life/Other Insurance	86	\$559.19	\$647.79	\$2,064,533
Health Insurance	93	\$1,673.07	\$1,802.54	\$6,176,959
Personal Care Products	75	\$338.63	\$450.58	\$1,742,370
School Books and Supplies	67	\$78.23	\$117.15	\$288,842
Smoking Products	95	\$471.93	\$496.44	\$1,742,370
<b>Transportation</b>				
Vehicle Purchases (Net Outlay)	90	\$5,309.37	\$5,867.22	\$19,602,212
Gasoline and Motor Oil	90	\$1,661.75	\$1,853.08	\$6,135,183
Vehicle Maintenance and Repairs	78	\$838.50	\$1,071.93	\$3,095,726
<b>Travel</b>				
Airline Fares	61	\$239.62	\$393.35	\$884,675
Lodging on Trips	72	\$287.84	\$397.26	\$1,062,710
Auto/Truck/Van Rental in Trips	60	\$27.38	\$45.29	\$101,105
Food and Drink on Trips	74	\$338.06	\$458.33	\$1,248,121

# Retail Goods and Services Expenditures

**Data Note:** The **Spending Potential Index (SPI)** is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

**Source:** Expenditure data are derived from the 2001, 2002, and 2003 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2006 and 2011.

## Definitions:

**Apparel Products and Services** includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.

**Membership Fees for Clubs** includes membership fees for social, recreational, and civic clubs.

**Sound Equipment** includes sound components and systems, CDs, tapes, records, needles, tape recorders, radios, musical instruments and accessories, and rental and repair of musical instruments.

**Recreational Vehicles & Fees** includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.

**Sports/Recreation/Exercise Equipment** includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.

**Photo Equipment and Supplies** includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.

**Reading** includes newspapers, newspaper subscriptions, magazines, magazine subscriptions, and books.

**Snacks and Other Food at Home** includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.

**Mortgage Payment and Basics** includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.

**Maintenance and Remodeling Materials** includes equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for patio/fence/brick work, landscaping materials, insulation materials, and materials to finish a basement, for owned homes.

**Household Textiles** includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.

**Major Appliances** includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.

**Housewares** includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.

**Lawn and Garden** includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.

**Housekeeping Supplies** includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrapping supplies, postage, and delivery services.

**Personal Care Products** includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, and personal care appliances.

**School Books and Supplies** includes books and supplies for college, elementary school, high school, and preschool.

**Vehicle Purchases (Net Outlay)** includes net outlay for new and used cars, trucks, vans, motorcycles, and motor scooters.

All data derives from the 2000 census from the US Census Bureau, a division of the US Department of Commerce.



2006 Total Population	9,315
2011 Total Population	9,428
2006-2011 Annual Rate	0.24%

2006 Households	3,692
2006 Average Household Size	2.49
2011 Households	3,760
2011 Average Household Size	2.48
2006-2011 Annual Rate	0.37%



<b>2006 Housing Units</b>	7,179
Owner Occupied Housing Units	43.8%
Renter Occupied Housing Units	7.6%
Vacant Housing Units	48.6%

<b>2011 Housing Units</b>	7,604
Owner Occupied Housing Units	42.0%
Renter Occupied Housing Units	7.5%
Vacant Housing Units	50.6%

#### 2000 Housing Units by Units in Structure

Total	6,602
1, Detached	76.8%
1, Attached	0.7%
2	1.2%
3 or 4	0.8%
5 to 9	1.2%
10 to 19	0.8%
20 +	1.7%
Mobile Home	14.9%
Other	1.9%



#### Median Household Income

2000	\$36,068
2006	\$43,029
2011	\$49,185

#### Median Home Value

2000	\$85,634
2006	\$144,735
2011	\$166,088

#### Per Capita Income

2000	\$17,458
2006	\$20,919
2011	\$24,861

#### Median Age

2000	40.7
2006	43.5
2011	45.7

**Data Note:** Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15

**Source:** U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2006 and

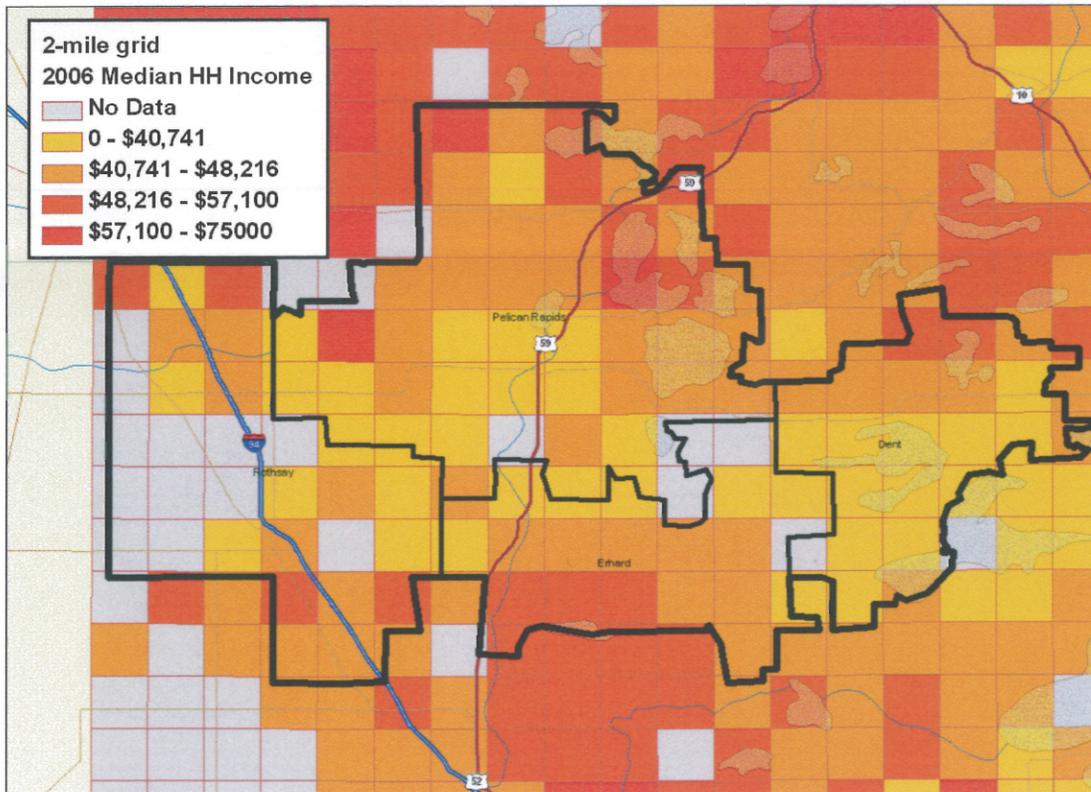


**2006 Household by Income**

Household Income Base	3,692
<15,000	14.4%
\$15,000 - \$24,999	12.1%
\$25,000 - \$34,999	13.6%
\$35,000 - \$49,999	18.3%
\$50,000 - \$74,999	22.6%
\$75,000 - \$99,999	9.8%
\$100,000 - \$149,999	6.8%
\$150,000 - \$199,999	1.2%
\$200,000+	1.2%
Average Household Income	\$52,414

**2011 Household by Income**

Household Income Base	3,760
<15,000	12.0%
\$15,000 - \$24,999	11.1%
\$25,000 - \$34,999	11.7%
\$35,000 - \$49,999	16.1%
\$50,000 - \$74,999	23.9%
\$75,000 - \$99,999	10.7%
\$100,000 - \$149,999	10.1%
\$150,000 - \$199,999	2.6%
\$200,000+	1.8%
Average Household Income	\$61,945



**Data Note:** Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied HUs exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

**Households by Net Worth**

< \$15,000	972
\$15,000-\$34,999	288
\$35,000-49,999	171
\$50,000-\$74,999	237
\$75,000-\$99,999	203
\$100,000-\$149,999	321
\$150,000-\$199,999	439
\$250,000-\$499,999	570
\$500,000+	491
Median Net Worth	\$96,373

**Households by Disposable Income**

< \$15,000	656
\$15,000-\$24,999	610
\$25,000-\$34,999	619
\$35,000-\$49,999	811
\$50,000-\$74,999	669
\$75,000-\$99,999	186
\$100,000-\$149,999	100
\$150,000-\$199,999	21
\$200,000+	20
Median Disposable Income	\$34,147



**2006 Population by Age**

Total	9,315
0 - 4	6.2%
5 - 9	5.6%
10 - 14	6.0%
25 - 34	8.7%
35 - 44	12.2%
45 - 54	16.9%
55 - 64	12.8%
65 - 74	9.7%
75 - 84	5.7%
85 +	2.7%
18 +	77.9%

**2011 Population by Age**

Total	9,428
0 - 4	5.9%
5 - 9	5.8%
10 - 14	6.2%
15 - 24	10.4%
25 - 34	10.5%
35 - 44	10.1%
45 - 54	16.7%
55 - 64	15.5%
65 - 74	9.6%
75 - 84	6.3%
85 +	3.0%
18 +	78.7%

**2006 Population by Race/Ethnicity**

Total	9,315
White Alone	90.2%
Black Alone	0.3%
American Indian Alone	0.8%
Asian or Pacific Islander Alone	1.3%
Some Other Race Alone	5.8%
Two or More Races	1.6%
Hispanic Origin	8.6%
Diversity Index	31.4

**2011 Population by Race/Ethnicity**

Total	9,428
White Alone	88.4%
Black Alone	0.4%
American Indian Alone	0.8%
Asian or Pacific Islander Alone	1.5%
Some Other Race Alone	7.1%
Two or More Races	1.8%
Hispanic Origin	10.4%
Diversity Index	36.5

**2000 Population 25+ by Educational Attainment**

Total	6,335
Less Than 9th Grade	10.9%
9th to 12th Grade, No Diploma	9.6%
High School Graduate	32.6%
Some College, No Degree	21.5%
Associate Degree	7.4%
Bachelor's Degree	12.3%
Master's/Prof/Doctorate Degree	5.7%



**2000 Population 16+ by Employment Status**

Total	7,205
In Labor Force	61.0%
Civilian Employed	57.5%
Civilian Unemployed	3.4%
In Armed Forces	0.1%
Not In Labor Force	39.0%

**2006 Civilian Population 16+ in Labor Force**

Civilian Employed	94.3%
Civilian Unemployed	5.7%



**2006 Employed Population 16+ by Industry**

Total	4,358
Agriculture/Mining	7.1%
Construction	7.8%
Manufacturing	15.4%
Wholesale Trade	3.1%
Retail Trade	12.7%
Transportation/Utilities	5.4%
Information	1.5%
Finance/Insurance/Real Estate	3.9%
Services	39.5%
Public Administration	3.4%

**2006 Employed Population 16+ by Occupation**

Total	4,358
White Collar	51.8%
Professional	18.1%
Sales	10.3%
Administrative Support	9.9%
Services	15.7%
Farming/Forestry/Fishing	2.2%
Construction/Extraction	7.2%
Installation/Maint/Repair	5.0%
Production	9.9%
Transportation/Material Moving	8.1%



**2000 Workers 16+ by Travel Time to Work**

Total	4,107
Did not Work at Home	92.4%
Less than 5 minutes	8.6%
5 to 9 minutes	15.8%
10 to 19 minutes	26.1%
20 to 24 minutes	9.0%
25 to 34 minutes	14.8%
35 to 44 minutes	4.5%
45 to 59 minutes	7.3%
60 to 89 minutes	4.5%
90 or more minutes	1.8%
Worked at Home	7.6%
Average Travel Time to Work (in min)	22.6

**2000 Households by Vehicles**

Total	3,628
None	5.0%
1	27.0%
2	41.7%
3	18.6%
4	5.1%
5+	2.6%
Average Number of Vehicles Available	2.0

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2006 and 2011.



**2000 Households by Type**

Total	3,630
Family Households	72.6%
Married-couple Family	63.4%
With Related Children	26.3%
Other Family (No Spouse)	9.3%
With Related Children	6.0%
Nonfamily Households	27.3%
Householder Living Alone	24.0%
Householder Not Living Alone	3.3%
Households with Related Children	32.3%
Households with Persons 65+	30.0%

**2000 Population 15+ by Sex and Marital Status**

Total	7,388
Females	49.1%
Never Married	7.4%
Married, Not Separated	32.5%
Married, Separated	0.4%
Widowed	5.9%
Divorced	2.9%
Males	50.9%
Never Married	12.5%
Married, Not Separated	33.0%
Married, Separated	0.3%
Widowed	1.4%
Divorced	3.6%

**2000 Households by Size**

Total	3,628
1 Person Household	24.0%
2 Person Household	39.1%
3 Person Household	12.8%
4 Person Household	12.7%
5 Person Household	7.7%
6 Person Household	2.3%
7 + Person Household	1.5%

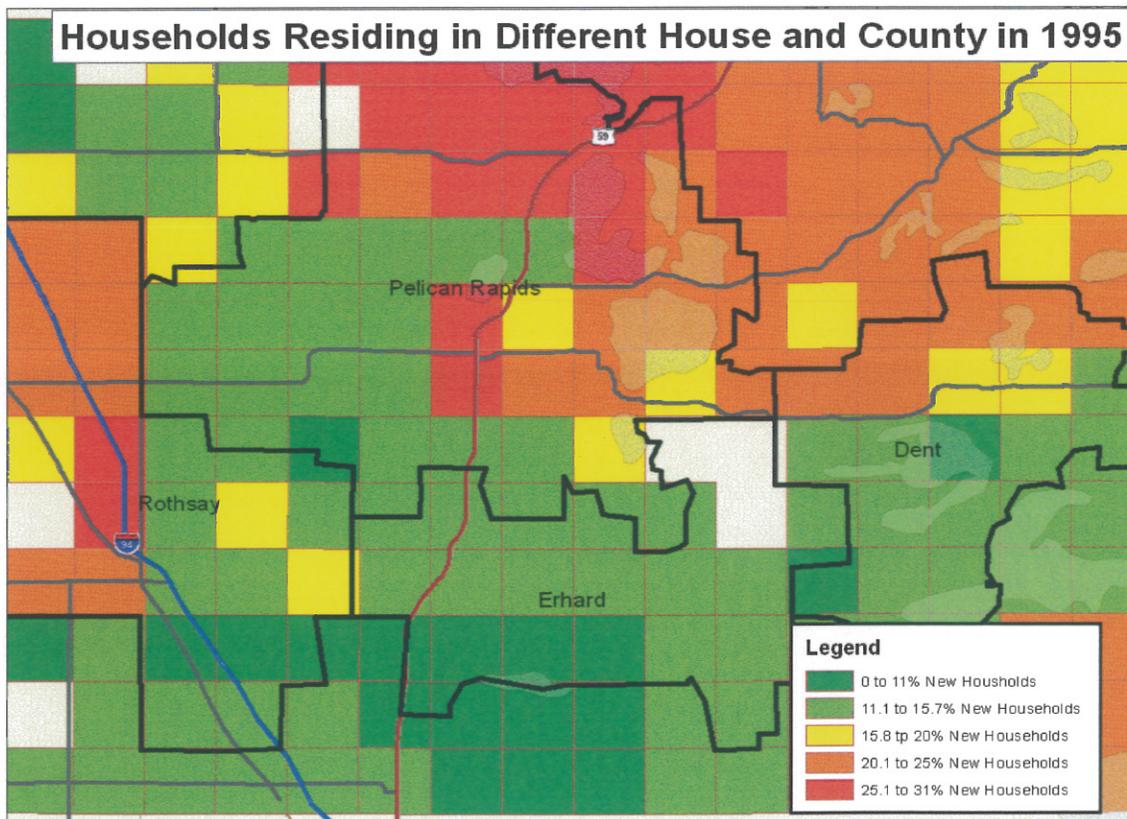
**2000 Households by Year Householder Moved In**

Total	3,630
Moved in 1999 to March 2000	13.1%
Moved in 1995 to 1998	24.9%
Moved in 1990 to 1994	20.0%
Moved in 1980 to 1989	19.4%
Moved in 1970 to 1979	11.6%
Moved in 1969 or Earlier	11.0%
Median Year Householder Moved In	1992

**2000 Housing Units by Year Structure Built**

Total	6,631
1999 to March 2000	1.7%
1995 to 1998	6.8%
1990 to 1994	6.3%
1980 to 1989	13.7%
1969 or Earlier	
1970 to 1979	
Median Year Structure Built	1968

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2006 and 2011.



## Retail Market Potential

Based on sales figures reported by Minnesota businesses to the 2002 Economic Census and 2005 non-employer sample and updated for inflation by CPI, US Department of Commerce (see Appendix 1 for more details).

NAICS	Industry	MN Sales Per Capita	Pelican Trade Area Market Potential	Sales per Average MN Establishment	Potential Number of Establishments
<b>Vehicle, Furniture, and Building Materials</b>					
44111	New car dealers	2,629.56	\$ 24,494,365	\$ 23,852,467	1.03
44112	Used car dealers	187.99	\$ 1,751,109	\$ 620,769	2.82
44121	Recreational vehicle dealers	69.24	\$ 645,000	\$ 2,044,886	0.32
44122	Motorcycle, boat, & other motor vehicle dealers	214.51	\$ 1,998,157	\$ 1,316,340	1.52
4413	Automotive parts, accessories, & tire stores	246.01	\$ 2,291,570	\$ 837,916	2.73
4421	Furniture stores	215.61	\$ 2,008,368	\$ 1,828,119	1.10
4422	Home furnishings stores	193.94	\$ 1,806,509	\$ 840,703	2.15
44311	Appliance, television, & other electronics stores	357.06	\$ 3,326,055	\$ 2,145,532	1.55
44312	Computer & software stores	67.89	\$ 632,360	\$ 1,025,718	0.62
44313	Camera & photographic supplies stores	19.26	\$ 179,441	\$ 1,100,276	0.16
44411	Home centers	426.18	\$ 3,969,849	\$ 15,936,060	0.25
44412	Paint & wallpaper stores	34.53	\$ 321,662	\$ 1,055,778	0.30
44413	Hardware stores	115.30	\$ 1,074,002	\$ 1,079,777	0.99
44419	Other building material dealers	495.59	\$ 4,616,377	\$ 2,184,788	2.11
4442	Lawn & garden equipment & supplies stores	292.79	\$ 2,727,299	\$ 1,999,723	1.36
<b>Food, Health, and Clothing</b>					
44511	Supermarkets & other grocery (except convenience) stores	1,609.98	\$ 14,996,983	\$ 8,504,143	1.76
44512	Convenience stores	34.98	\$ 325,813	\$ 736,025	0.44
4452	Specialty food stores	44.85	\$ 417,768	\$ 250,924	1.66
4453	Beer, wine, & liquor stores	227.12	\$ 2,115,593	\$ 1,105,306	1.91
44611	Pharmacies & drug stores	499.39	\$ 4,651,861	\$ 4,036,802	1.15
44612	Cosmetics, beauty supplies, & perfume stores	19.66	\$ 183,097	\$ 81,407	2.25
44613	Optical goods stores	30.97	\$ 288,474	\$ 501,445	0.58
44619	Other health & personal care stores	43.97	\$ 409,588	\$ 252,534	1.62
44719	Other gasoline stations	198.82	\$ 1,852,024	\$ 1,960,911	0.94
44711	Gasoline stations with convenience stores	1,025.57	\$ 9,553,193	\$ 2,565,221	3.72
4481	Clothing stores	408.22	\$ 3,802,556	\$ 917,719	4.14
4482	Shoe stores	66.47	\$ 619,124	\$ 733,464	0.84
44831	Jewelry stores	84.90	\$ 790,861	\$ 586,819	1.35
44832	Luggage & leather goods stores	3.61	\$ 33,618	\$ 457,518	0.07
<b>Leisure Goods</b>					
45111	Sporting goods stores	179.92	\$ 1,675,969	\$ 859,526	1.95
45112	Hobby, toy, & game stores	55.35	\$ 515,584	\$ 487,606	1.06
45113	Sewing, needlework, & piece goods stores	28.18	\$ 262,492	\$ 251,660	1.04
45114	Musical instrument & supplies stores	26.09	\$ 243,008	\$ 627,752	0.39
45121	Book stores & news dealers	56.60	\$ 527,189	\$ 395,380	1.33
45122	Prerecorded tape, compact disc, & record stores	19.31	\$ 179,871	\$ 560,700	0.32
452111	Department stores (expt discount dept stores)	328.25	\$ 3,057,610	\$ 27,080,910	0.11
452112	Discount department stores	956.74	\$ 8,912,040	\$ 31,275,319	0.28
4529	Other general merchandise stores	623.74	\$ 5,810,166	\$ 8,645,279	0.67
<b>Miscellaneous and Nonstore Retail</b>					
4531	Florists	41.77	\$ 389,077	\$ 250,692	1.55
45321	Office supplies & stationery stores	63.40	\$ 590,569	\$ 1,339,545	0.44
45322	Gift, novelty, & souvenir stores	85.38	\$ 795,356	\$ 208,551	3.81
4533	Used merchandise stores	36.82	\$ 342,986	\$ 120,669	2.84
45391	Pet & pet supplies stores	36.45	\$ 339,499	\$ 601,380	0.56
45392	Art dealers	11.81	\$ 110,049	\$ 158,262	0.70
45393	Manufactured (mobile) home dealers	39.68	\$ 369,640	\$ 2,148,471	0.17
45399	All other miscellaneous store retailers	67.88	\$ 632,284	\$ 131,252	4.82
4541	Electronic shopping & mail-order houses	646.01	\$ 6,017,581	\$ 1,931,941	3.11

## Retail Market Potential

NAICS	Industry	MN Sales Per Capita	Pelican Trade Area Market Potential	Sales per Average MN Establishment	Market Potential by Establishment
4542	Vending machine operators	44.19	\$ 411,605	\$ 302,594	1.36
4543	Direct selling establishments	339.81	\$ 3,165,365	\$ 80,163	39.49
<b>Rental</b>					
51213	Motion picture & video exhibition (movie theaters)	38.81	\$ 361,538	\$ 1,528,277	0.24
5321	Automotive equipment rental & leasing	190.18	\$ 1,771,509	\$ 2,094,224	0.85
53221	Consumer electronics & appliances rental	1.32	\$ 12,303	\$ 190,688	0.06
53222	Formal wear & costume rental	4.37	\$ 40,686	\$ 445,139	0.09
53223	Video tape & disc rental	29.38	\$ 273,715	\$ 420,740	0.65
5323	General rental centers	13.90	\$ 129,501	\$ 374,401	0.35
<b>Technical and other Services</b>					
54192	Photographic services	83.64	\$ 779,109	\$ 193,558	4.03
56151	Travel agencies	52.78	\$ 491,682	\$ 564,508	0.87
56172	Janitorial services	112.23	\$ 1,045,449	\$ 82,603	12.66
56173	Landscaping services	145.43	\$ 1,354,707	\$ 173,811	7.79
56174	Carpet & upholstery cleaning services	10.56	\$ 98,334	\$ 113,131	0.87
<b>Amusement and Recreation</b>					
7131	Amusement parks & arcades	2.44	\$ 22,696	\$ 98,171	0.23
7139	Other amusement & recreation services (golf, bowling, fitness)	233.69	\$ 2,176,820	\$ 288,717	7.54
<b>Accommodation and Food Services</b>					
7211	Traveler accommodation	475.51	\$ 4,429,364	\$ 1,266,145	3.50
7212	RV (recreational vehicle) parks & recreational camps	22.20	\$ 206,753	\$ 174,795	1.18
7221	Full-service restaurants	609.03	\$ 5,673,118	\$ 836,109	6.79
7222	Limited-service eating places	491.92	\$ 4,582,220	\$ 646,638	7.09
7224	Drinking places (alcoholic beverages)	78.59	\$ 732,044	\$ 316,152	2.32
<b>Auto and Equipment Services</b>					
81111	Automotive mechanical & electrical repair & maintenance	36.33	\$ 338,431	\$ 43,055	7.86
81112	Automotive body, paint, interior, & glass repair	24.85	\$ 231,484	\$ 49,621	4.67
81119	Other automotive repair & maintenance (car wash/oil change)	48.15	\$ 448,553	\$ 192,084	2.34
8112	Electronic & precision equipment repair & maintenance	10.10	\$ 94,103	\$ 54,188	1.74
81141	Home & garden equipment & appliance repair	4.74	\$ 44,164	\$ 30,386	1.45
81142	Reupholstery & furniture repair	3.16	\$ 29,451	\$ 23,476	1.25
81143	Footwear & leather goods repair	0.42	\$ 3,958	\$ 24,008	0.16
81149	Other personal repair (watch, boat, garment, other)	32.73	\$ 304,917	\$ 36,169	8.43
<b>Personal Services</b>					
812111	Barber shops	6.21	\$ 57,865	\$ 25,443	2.27
812112	Beauty salons	40.60	\$ 378,152	\$ 26,375	14.34
812113	Nail salons	3.52	\$ 32,798	\$ 20,448	1.60
81219	Other personal care services	6.80	\$ 63,311	\$ 16,608	3.81
8122	Death care services	8.54	\$ 79,515	\$ 65,633	1.21
81231	Coin-operated laundries & drycleaners	1.96	\$ 18,293	\$ 26,861	0.68
81232	Drycleaning & laundry services (except coin-operated)	4.36	\$ 40,618	\$ 52,464	0.77
81291	Pet care (except veterinary) services	4.49	\$ 41,809	\$ 19,871	2.10
81292	Photofinishing	3.12	\$ 29,109	\$ 38,857	0.75

## Appendix I: Data and Methodology (Organized by Report Section)

### *Tapestry Segmentation Profile Section:*

Segmentation systems operate on the theory that people with similar tastes, lifestyles, and behaviors seek others with the same tastes—"like seeks like." These behaviors can be measured, predicted, and targeted. ESRI's segmentation system, Community™ Tapestry™, combines the "who" of lifestyle demography with the "where" of local neighborhood geography to create a model of various lifestyle classifications or segments of actual neighborhoods with addresses—distinct behavioral market segments.

### *Segmentation Methodology:*

Based on the foundation of proven segmentation methodology introduced more than 30 years ago, the Community Tapestry system classifies U.S. neighborhoods into 65 market segments. Neighborhoods with the most similar characteristics are grouped together while neighborhoods showing divergent characteristics are separated.

Each neighborhood is analyzed and sorted by more than 60 attributes including income, employment, home value, housing type, education, household composition, age, and other key determinants of consumer behavior. U.S. consumer markets are multidimensional and diverse. Using a large array of attributes captures this diversity with the most powerful data available.

Data sources such as Census 2000 data, ESRI's proprietary demographic updates, Acxiom's InfoBase consumer database, Mediamark Research Inc.'s Doublebase 2004 national consumer survey, and other sources are used to capture the subtlety and vibrancy of the U.S. marketplace.

Source: Community Tapestry Handbook, May 2006. Available at <http://www.esri.com>

### *Media and Leisure Data:*

These habits are derived from an ongoing, comprehensive study of the adult population of the United States called *The Survey of the American Consumer*. The survey is conducted by Mediamark Research, a national marketing firm. Conducted continuously since 1979, Mediamark surveys the demographics, product usage, and media exposure of all persons aged 18 and over in the contiguous 48 states.

### *Media and Leisure Methodology:*

One adult per household is selected to participate in the survey. Each listed household is predesignated with the sex of the prospective respondent. If the household does not have any adult member of the predesignated sex, then the available respondent is selected. This is done in such a way that men and women constitute, in effect, separate samples of randomly selected individuals.

The completed Mediamark sample consists of over 25,000 respondents. Each year the sample is completely redrawn, with 13,000 new respondents entering the survey every six months. 2,400 new clusters are selected yearly from a continuously updated master list.

Resulting data is weighted to reflect the probabilities of selection inherent in the sample design and then balanced so that major study demographics match the most recent independent estimates. Weighting and subsequent balancing are accomplished within the male and female portions of the sample. The samples are then balanced on a set of population parameters.

For more information, see <http://www.mediamark.com> and follow *The Survey of the American Consumer*.

#### ***Retail Goods and Services Section:***

To estimate consumer spending patterns, the (2001-2003) Consumer Expenditure Surveys (CEX) from the Bureau of Labor Statistics (BLS) were combined with ESRI Community™ Tapestry™ segmentation. A conditional probability model links spending by the consumers surveyed to all households with similar socioeconomic characteristics. Spending patterns are developed by Tapestry markets and updated to 2005 by adjusting to current levels of income. Expenditures represent 2005 annual averages and totals.

#### ***More about the Consumer Expenditure Survey (CEX):***

These continuing surveys include a Diary Survey for daily purchases and an Interview Survey for general purchases. The Diary Survey represents record-keeping by consumer units (CU) for two consecutive weeklong periods. This component of the CEX collects data on small, daily purchases that could be overlooked by the quarterly Interview Survey. The Interview Survey collects expenditure data from consumers in five interviews conducted every three months. The data from both surveys is integrated to provide a comprehensive database on all consumer expenditures. To compensate for the relatively small CEX survey bases and the variability of single-year data, expenditures are combined from the 2001-2003 surveys. The combined years account for 45,000 independent households nationwide.

#### ***Market Profile Section:***

All data derives from the 2000 census from the US Census Bureau, a division of the US Department of Commerce. ESRI demographers created all projections and updates to 2006.

#### ***Market Potential Section:***

Market potential is an estimate of the full spending of all residents, not the actual spending of residents in a community. These estimates are given for a range of retail and service categories and compared to the average sales per establishment to help identify a “gap” or business opportunity in the community. Those categories where the market potential is greater than the average sales per establishment are opportunities for new business development, although these measurements are based on broad industry averages and do not substitute for individual business planning.

### *Definition of Terms*

#### **Sales Per Capita**

Based on the US Economic Census, per capita (or “per person”) sales are calculated by dividing Minnesota total sales in a category by Minnesota total population.

#### **Average Sales per Establishment**

Based on the US Economic Census, average sales per establishment are calculated by dividing Minnesota total sales in a category by Minnesota total number of establishment in the same category.

#### **Market Potential**

Market Potential is calculated by multiplying per capita (or per person) spending in Minnesota times the number of residents in the local community.

#### **Market Potential by Establishment**

Based on the US Economic Census, market potential by establishment is calculated by dividing market potential by average sales per establishment. This gives an indication of how many stores the local market could support. Anytime this measure is over one is an indication that a store in that category may be an opportunity for business development in the community. Certainly the number of businesses currently operating in the community need to be taken into consideration when measuring the support for any additional businesses.

#### **US Economic Census**

Conducted every 5 years by the US Census Bureau, the Economic Census collects business information from most every business with employees across all geographies and industries in the United States as well as a sample of small businesses (those without employees and with less than 4 employees).

#### **Pull Factor**

The pull factor was developed by Dr. Ken Stone, an economist from Iowa State University Extension Service to provide a precise measure of sales activity in a locality. It is derived by dividing the per capita current dollar sales of a city or county by the per capita sales for the state. For example, if a city's per capita sales are \$20,000 per year and the state per capita sales are \$10,000 per year, the pull factor is 2.0 ( $\$20,000 \div \$10,000$ ). The interpretation is that the city is selling to 200 percent of the city population.

# 31 Rural Resort Dwellers

Segment Code.....31  
Segment Name..... *Rural Resort Dwellers*  
LifeMode Group ..... LT2 *American Quilt*  
Urbanization Group..... U10 *Rural I*



## Demographic

Preferring milder climates and pastoral settings, *Rural Resort Dwellers* residents live in rural nonfarm areas throughout the United States. The chief household type (39 percent of households) for this segment is a married couple with no children living at home. Other significant household types include singles who live alone (24 percent) and married couples with children (21 percent). This somewhat older segment has a median age of 46 years. Thirty-five percent of the population and half of the householders are aged 55 years or older. There is little diversity in these communities: most residents are white.

## Socioeconomic

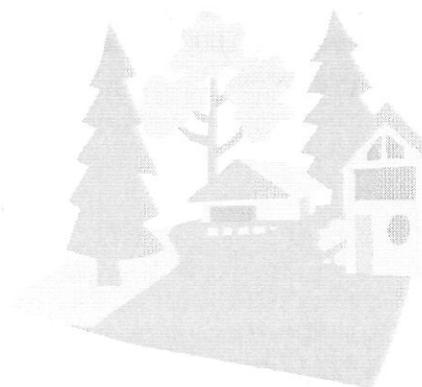
Although retirement officially looms for many *Rural Resort Dwellers* residents, most of them still work. The median household income is \$45,600, slightly below the U.S. level. Six percent of all who are employed work at home, twice that of the U.S. percentage. Because of the higher-than-average presence of residents aged 65 or older, receipt of retirement income and Social Security benefits is common for these households. More than two-fifths of households collect investment income; approximately one-fifth earn self-employment income. More than half of the population aged 25 years and older hold a bachelor's or graduate degree or have attended college, comparable to the U.S. level. The median net worth is \$99,700, slightly below the U.S. median.

## Residential

Although these low-density communities are small, households are growing at 1.7 percent annually. Typical of areas with rustic appeal, the household inventory features single-family structures (78 percent) and mobile homes (15 percent). Homeownership is at 83 percent, and the median home value is \$181,600. A significant inventory of seasonal housing exists in these communities; the *Rural Resort Dwellers* market has the highest percentage of seasonal housing of all the Community Tapestry segments, 18 times higher than the national level.

## Preferences

Modest living and simple consumer tastes describe *Rural Resort Dwellers* residents. Gardening tools and equipment are an integral part of maintaining their properties. They often work on home remodeling and improvement projects. Their simple lifestyle also includes baking and preparing home-cooked meals. Many households have pets, particularly dogs. The rural setting means higher-than-average numbers of riding lawn mowers and satellite dishes. Many households also own multiple vehicles including a truck. *Rural Resort Dwellers* residents actively participate in local civic issues. They enjoy boating, hunting, fishing, snorkeling, and canoeing. They listen to country music on the radio. The older population focuses on age-related issues such as general health care, prescription medications, and financial and retirement-related matters. Many *Rural Resort Dwellers* residents actively manage or plan their investments and retirement savings. IRA accounts are more popular than 401(k) plans with this high proportion of self-employed residents.



# 37 Prairie Living

Segment Code.....37  
Segment Name.....*Prairie Living*  
LifeMode Group.....L11 *Factories and Farms*  
Urbanization Group.....U11 *Rural II*



## Demographic

Small, family-owned farms in the Midwest dominate this stable market. Two-thirds of these households are composed of married couples, with and without children. These residents are slightly older, with a median age of 40.5 years. These communities have little ethnic diversity; 93 percent of *Prairie Living* residents are white.

## Socioeconomic

The 67 percent labor force participation rate is high; the 4 percent unemployment rate is low. One in four residents who work is self-employed. Agricultural jobs are an important part of the *Prairie Living* economy, although 40 percent of employed residents work in white-collar jobs. Thirty-one percent of households receive Social Security benefits; 43 percent receive investment income. The median household income is \$41,000; the median net worth is \$79,600. Overall, 82 percent of residents aged 25 years and older have graduated from high school. Twenty-nine percent have attended college.

## Residential

*Prairie Living* neighborhoods are primarily located in the Midwest, with much smaller concentrations in the West and South. States with the highest household concentrations are Iowa, Nebraska, Minnesota, and Kansas. Homeownership is at 81 percent and the median home value is \$96,300. Single-family dwellings are characteristic of these farm communities. Notably, 11 percent of housing units are mobile homes, slightly higher than the U.S. percentage. Approximately 36 percent of the housing units in this segment were built before 1940. Due to the long-term decline in agricultural employment and the loss of family farms, household growth in *Prairie Living* neighborhoods is nil. The rural setting renders multiple vehicles a necessity. Approximately three-fourths of households have two or more vehicles; one-third have three or more.

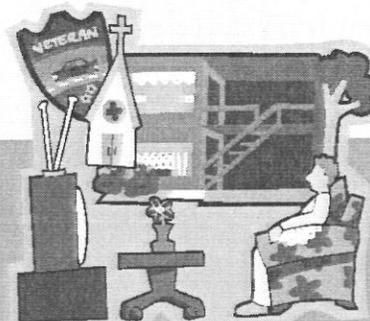
## Preferences

Their purchases reflect their rural lifestyle; *Prairie Living* residents buy work boots and hunting clothes. They own separate freezers, coal and wood stoves, and pressure cookers. To fill those freezers, *Prairie Living* residents plant vegetable gardens, in addition to crops, and hunt or fish. To take care of their possessions, *Prairie Living* households own riding lawn mowers, gardening equipment, and vehicle and home repair tools. They service their own vehicles and tackle home improvement projects such as kitchen remodeling. They own pets, particularly dogs. Because cable television is not available in many rural neighborhoods, satellite dishes are frequently used. *Prairie Living* residents are loyal country music fans and tune in to radio and television for their favorite music. They enjoy hunting and fishing. They tend to be political conservatives. They prefer domestic vehicles, especially trucks. Civic-minded *Prairie Living* residents serve on church boards, address public meetings, volunteer for charitable organizations, and help with fund-raising. *Prairie Living* households shop for bargains. Wal-Mart is, by far, their favorite department store, followed by Kmart and J.C. Penney. They often rely on a Wal-Mart Supercenter for their extra grocery shopping.



# 57 Simple Living

Segment Code..... 57  
Segment Name..... *Simple Living*  
LifeMode Group..... 15 *Senior Styles*  
Urbanization Group..... U6 *Urban Outskirts II*



## Demographic

With a median age of 40.1 years, this market is slightly older than the U.S. median. Approximately one-third of *Simple Living* residents are aged 65 years or older; 19 percent are aged 75 or older. Half of the householders are singles who live alone or share housing; 32 percent are married-couple families. Young families with children and ethnic cultures are in the minority; most residents are white.

## Socioeconomic

The median household income for this market is a modest \$26,700. Nearly 40 percent of households collect Social Security benefits, 8 percent receive Supplemental Security Income, and 6 percent receive public assistance. Over the years, residents have built equity in their homes and saved their hard-earned dollars to achieve their median net worth of \$58,100. Most residents who are employed work in the health care, retail trade, manufacturing, educational services, and accommodation/food services industry sectors. Overall, 71 percent of residents aged 25 years and older have graduated from high school. Only 12 percent hold a bachelor's or graduate degree.

## Residential

*Simple Living* neighborhoods are found in the urban outskirts or suburban areas throughout the United States. Housing is older; approximately 62 percent of the housing units were built before 1970. More than half of the households rent. Forty-two percent of housing is single-family dwellings and 47 percent is in multiunit buildings of varying stories. Some seniors live in congregate housing (assisted living). The median home value for owner-occupied dwellings is \$97,100. Twenty-two percent of households do not own a vehicle; 45 percent own only one vehicle. Workers benefit from an average commute time to work of 20.4 minutes.

## Preferences

The lifestyle of *Simple Living* residents is represented by both the young and the old, who enjoy hunting, fishing, and team sports such as softball and volleyball. Younger residents enjoy dancing and nightclubs; the seniors participate in bingo nights and pursue hobbies such as photography, bird-watching, and woodworking. Community activities are also important; they serve on church or school boards and join veterans' clubs. Typical of a retirement lifestyle, they enjoy walking, swimming, and playing golf to stay fit.

*Simple Living* households spend wisely on a restricted budget. They buy the essentials at discount stores and occasionally treat themselves to dinner out and a movie. Cable or satellite TV is a must for these frequent viewers of family programs and game shows. Most households own VCRs and CD players; however, owning personal computers, cellular phones, and DVD players is not important to them.

