



Greater NE Fillmore Market Area Profile, June, 2009

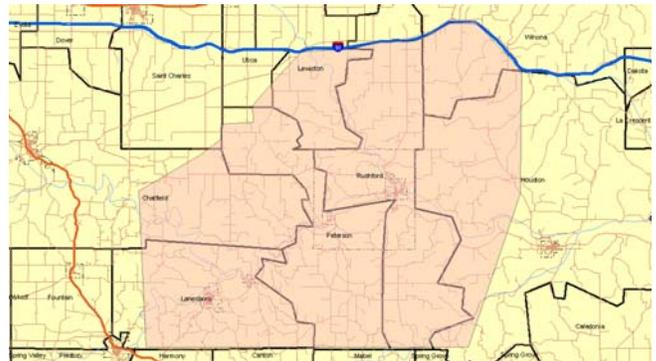
Results based on an analysis from multiple datasources, compiled using Business Analyst from ESRI (www.esri.com).

See *Data and Methodology* for more details.

How large is the local retail market ?

6,710 people living in 2,710 households. Household spending on retail goods and services is estimated at \$58 million.

The *local* market area for this analysis encompasses most of the Rushford-Peterson school district along with a portions of surrounding zip codes (see figure to right).



What do we know about households in the Greater NE Fillmore trade area?

Median Household Income	\$47,660	Median Net Worth	\$69,303
Median Disposable Income	\$37,118	Median Age	43.7
Households with related children	31.5%	Households with persons 65+	31.3%

What do we know about housing in the Greater NE Fillmore trade area ?

Total Housing Units (2008)	3,148	Renter Occupied Units	554 or 17.6% of total
Median Home Value	\$130,896	Seasonal Housing Units	134 or 4.3%

What types of customers live in the Greater NE Fillmore trade area ?

	<i>Prairie Living</i>	<i>Midlife Junction</i>	<i>Heartland Communities</i>
Number	1,037	724	567
Percent of Households	38%	26%	21%

Demographics

Household type	Married couple families	Mixed	Mixed
Median Household Income	\$43,065	\$49,031	\$35,544
Median Home Value	\$106,220	\$146,293	\$82,080

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Greater NE Fillmore 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:

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Funding provided by the Rushford Area Foundation.

A special thank you to the participating cities of Rushford, Rushford Village, and Peterson

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	NE Fillmore Trade Area	Minnesota
2008 Total Population	6,710	5,357,700
2013 Total Population	6,826	5,636,868
2008-2013 Annual Rate	0.00%	1.00%
2008 Households	2,760	2,099,737
2008 Average Household Size	2.36	2.48
2013 Households	2,835	2,218,134
2013 Average Household Size	2.34	2.48
2008-2013 Annual Rate	1.00%	1.00%

Income:



Median Household Income

2000	\$37,745	\$47,143
2008	\$47,660	\$62,757
2013	\$55,186	\$73,083

Per Capita Income

2000	\$17,295	\$23,199
2008	\$22,217	\$31,884
2013	\$25,076	\$38,864

2008 Household by Income

Household Income Base	2,759	2,099,736
<15,000	12.1%	7.8%
\$15,000 - \$24,999	11.3%	8.1%
\$25,000 - \$34,999	12.0%	8.8%
\$35,000 - \$49,999	17.0%	13.5%
\$50,000 - \$74,999	27.0%	22.1%
\$75,000 - \$99,999	12.5%	14.3%
\$100,000 - \$149,999	5.7%	16.6%
\$150,000 - \$199,999	1.6%	4.2%
\$200,000+	0.8%	4.5%

Average Household Income	\$53,910	\$80,432
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2013 Household by Income

Household Income Base	2,836	2,218,133
<15,000	10.2%	6.3%
\$15,000 - \$24,999	10.1%	6.6%
\$25,000 - \$34,999	9.4%	6.3%
\$35,000 - \$49,999	14.4%	10.4%
\$50,000 - \$74,999	31.5%	22.0%
\$75,000 - \$99,999	12.7%	15.6%
\$100,000 - \$149,999	9.0%	21.2%
\$150,000 - \$199,999	1.5%	5.5%
\$200,000+	1.0%	6.0%

Average Household Income	\$60,263	\$97,774
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2008 Households by Disposable Income

Total Households	2,760	2,099,736
<\$15,000	15.0%	9.8%
\$15,000 - \$34,999	14.7%	10.7%
\$35,000 - \$49,999	21.9%	17.7%
\$50,000 - \$74,999	23.8%	23.9%
\$75,000 - \$99,999	4.5%	11.7%
\$100,000 - \$149,999	3.4%	9.5%
\$150,000 - \$199,999	0.3%	2.1%
\$200,000 +	0.5%	2.4%

Average Disposable Income	\$43,486	\$63,250
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Median Disposable Income	\$37,118	\$49,570
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2008 Households by Net Worth

	NE Fillmore Trade Area	Minnesota
Total Households	2,760	2,099,736
<\$15,000	26.0%	19.9%
\$15,000 - \$34,999	10.6%	7.6%
\$35,000 - \$49,999	6.7%	4.7%
\$50,000 - \$74,999	8.3%	6.3%
\$75,000 - \$99,999	6.7%	5.0%
\$100,000 - \$149,999	11.4%	9.9%
\$150,000 - \$249,999	11.6%	12.3%
\$250,000 - \$499,999	10.0%	16.0%
\$500,000-\$999,999	6.0%	10.8%
\$1,000,000+	2.77%	7.54%
2008 Average Net Worth	\$248,906	\$493,460
2008 Median Net Worth	\$69,303	\$129,686

Housing:



2008 Housing Units

Owner Occupied Housing Units	70.0%	67.0%
Renter Occupied Housing Units	17.6%	23.2%
Vacant Housing Units	11.5%	9.7%

2013 Housing Units

Owner Occupied Housing Units	68.7%	66.0%
Renter Occupied Housing Units	17.5%	23.5%
Vacant Housing Units	13.0%	10.5%

Median Home Value

2000	\$85,136	\$118,064
2008	\$130,896	\$187,003
2013	\$134,675	\$196,336

2008 Owner Occupied HUs by Value

Total Housing Units	2,206	1,559,119
<50,000	8.2%	5.6%
\$50,000 - \$99,999	23.1%	10.6%
\$100,000 - \$149,999	29.7%	18.8%
\$150,000 - \$199,999	15.7%	20.7%
\$200,000 - \$299,999	13.0%	26.5%
\$300,000 - \$499,999	7.2%	13.1%
\$500,000 - \$999,999	2.7%	3.9%
\$1,000,000 +	0.5%	0.9%
Average Home Value	\$166,592	\$219,229
Median Home Value	\$130,896	\$187,003

2000 Housing Units by Units in Structure

Total Housing Units	2,825	2,065,946
1, Detached	80.9%	67.8%
1, Attached	1.6%	5.2%
2	2.9%	3.0%
3 or 4	2.3%	2.3%
5 to 9	2.2%	2.4%
10 to 19	2.4%	3.8%
20 +	1.0%	10.7%
Mobile Home	6.5%	4.5%
Other	0.0%	0.0%

2000 Housing Units by Year Structure Built	NE Fillmore Trade Area	Minnesota
Total Housing Units	2,823	2,065,946
1999 to March 2000	2.8%	2.3%
1995 to 1998	5.8%	6.6%
1990 to 1994	5.0%	7.0%
1980 to 1989	8.0%	14.0%
1970 to 1979	14.9%	18.2%
1969 or Earlier	63.6%	51.2%
Median Year Structure Built	1950	1969

Population Demographics:



Median Age	NE Fillmore Trade Area	Minnesota
2000	40.7	35.4
2008	43.7	36.9
2013	45.2	37.6

2008 Population by Age	NE Fillmore Trade Area	Minnesota
Total Population	6,708	5,357,700
0 - 4	5.7%	6.8%
5 - 9	5.7%	6.5%
10 - 14	6.0%	6.7%
15 - 24	11.7%	14.1%
25 - 34	10.6%	13.1%
35 - 44	12.0%	14.4%
45 - 54	15.8%	15.2%
55 - 64	13.1%	10.9%
65 - 74	8.4%	6.0%
75 - 84	6.9%	4.1%
85 +	4.2%	2.1%
18 +	78.5%	75.8%

2008 Population by Race/Ethnicity	NE Fillmore Trade Area	Minnesota
Total Population	6,710	5,357,700
White Alone	98.6%	87.2%
Black Alone	0.2%	4.2%
American Indian Alone	0.1%	1.1%
Asian or Pacific Islander Alone	0.3%	3.8%
Some Other Race Alone	0.3%	1.8%
Two or More Races	0.4%	2.0%
Hispanic Origin	0.6%	3.9%
Diversity Index	3.9	29.4

2008 Population 25+ by Educational Attainment	NE Fillmore Trade Area	Minnesota
Total Population	4,759	3,526,447
Less Than 9th Grade	7.7%	3.8%
9th to 12th Grade, No Diploma	7.2%	5.8%
High School Graduate	36.4%	28.8%
Some College, No Degree	19.9%	22.6%
Associate Degree	8.9%	9.0%
Bachelor's Degree	13.8%	20.6%
Master's/Prof/Doctorate Degree	6.1%	9.4%

2008 Population 15+ by Marital Status	NE Fillmore Trade Area	Minnesota
Total Population	5,546	4,284,069
Never Married	22.4%	28.7%
Married, Not Separated	62.2%	56.9%
Married, Separated	15.5%	14.4%
Widowed	8.4%	5.2%
Divorced	7.1%	9.2%

Household Demographics:



2000 Households by Type

	<i>NE Fillmore Trade Area</i>	<i>Minnesota</i>
Total	2,533	1,895,127
Family Households	69.6%	66.2%
Married-couple Family	60.6%	53.7%
With Related Children	25.6%	25.8%
Other Family (No Spouse)	9.0%	12.5%
With Related Children	5.9%	8.5%
Nonfamily Households	30.5%	33.8%
Householder Living Alone	26.6%	26.9%
Householder Not Living Alone	3.9%	6.9%

2000 Households by Size

	<i>NE Fillmore Trade Area</i>	<i>Minnesota</i>
Total	2,534	1,895,127
1 Person Household	26.6%	26.9%
2 Person Household	37.3%	33.9%
3 Person Household	13.5%	15.0%
4 Person Household	13.3%	14.4%
5 Person Household	6.6%	6.5%
6 Person Household	1.8%	2.1%
7 + Person Household	0.9%	1.2%
Households with Related Children	31.5%	34.3%
Households with Persons 65+	31.3%	21.3%

2000 Households by Year Householder Moved In

	<i>NE Fillmore Trade Area</i>	<i>Minnesota</i>
Total	2,534	1,895,127
Moved in 1999 to March 2000	12.9%	17.6%
Moved in 1995 to 1998	23.8%	28.4%
Moved in 1990 to 1994	15.8%	17.4%
Moved in 1980 to 1989	17.8%	16.6%
Moved in 1970 to 1979	13.5%	10.0%
Moved in 1969 or Earlier	16.2%	10.0%
Median Year Householder Moved In	1991	1994

2000 Households by Vehicles Available

	<i>NE Fillmore Trade Area</i>	<i>Minnesota</i>
Total	2,535	1,895,127
None	6.0%	7.7%
1	27.3%	31.2%
2	42.7%	42.2%
3	17.4%	13.7%
4	5.2%	3.8%
5+	1.3%	1.5%
Average Number of Vehicles Available	1.9	1.8

Employment:



2008 Employed Population 16+ by Industry	NE Fillmore Trade Area	Minnesota
Total		
Agriculture/Mining	3,307 8.3%	2,752,132 1.9%
Construction	7.9%	6.4%
Manufacturing	16.6%	13.4%
Wholesale Trade	2.9%	3.5%
Retail Trade	9.3%	11.1%
Transportation/Utilities	5.0%	4.8%
Information	2.0%	2.1%
Finance/Insurance/Real Estate	2.7%	8.0%
Services	42.6%	45.8%
Public Administration	2.8%	3.0%
2008 Employed Population 16+ by Occupation		
Total	3,308	2,752,132
White Collar	54.1%	62.5%
Management/Business/Financial	17.6%	15.5%
Professional	18.5%	22.4%
Sales	7.3%	11.3%
Administrative Support	10.6%	13.3%
Services	15.2%	15.8%
Blue Collar	30.7%	21.7%
Farming/Forestry/Fishing	2.2%	0.5%
Construction/Extraction	6.9%	5.0%
Installation/Maintenance/Repair	3.7%	3.5%
Production	11.5%	7.2%
Transportation/Material Moving	6.4%	5.6%
2000 Workers 16+ by Means of Transportation to Work		
Total	3,262	2,541,611
Drove Alone - Car, Truck, or Van	69.7%	77.6%
Carpooled - Car, Truck, or Van	13.5%	10.4%
Public Transportation	0.6%	3.2%
Walked	5.1%	3.3%
Other Means	0.6%	0.9%
Worked at Home	10.4%	4.6%
2000 Workers 16+ by Travel Time to Work		
Total	3,262	2,541,611
Did not Work at Home	89.6%	95.4%
Less than 5 minutes	9.0%	4.4%
5 to 9 minutes	17.4%	13.3%
10 to 19 minutes	20.4%	31.0%
20 to 24 minutes	7.9%	14.4%
25 to 34 minutes	17.0%	17.3%
35 to 44 minutes	4.4%	5.4%
45 to 59 minutes	6.9%	5.3%
60 to 89 minutes	3.9%	2.7%
90 or more minutes	2.7%	1.5%
Worked at Home	10.4%	4.6%
Average Travel Time to Work (in min)	23.8	21.9

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Forecasts for 2008 and 2013 from ESRI (www.esri.com).



Lifestyle Profile Summary

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).

Top Segments:	Number	Percent	Index
37 Prairie Living	1,037	37.6%	3,720
33 Midlife Junction	724	26.2%	1,049
50 Heartland Communities	567	20.5%	942

37 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 41.3 years. Homeownership is at 80 percent; the median home value is \$106,220. Although single-family dwellings are characteristic of these communities, 11 percent of the households live in mobile homes. More than a third 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.

33 Midlife Junction

Midlife Junction communities are found in suburbs across the country. Residents are phasing out of their child-rearing years. Approximately half of the households are composed of married-couple families; 31 percent are singles who live alone. The median age is 41.2 years; the median household income is \$49,031. One-third of the households receive Social Security benefits. Nearly two-thirds of the households are single-family structures; most of the remaining dwellings are apartments in multiunit buildings. These residents live quiet, settled lives. They spend their money prudently and do not succumb to fads. They prefer to shop by mail or phone from catalogs such as J.C. Penney, L.L. Bean, and Lands' End. They enjoy yoga, attending country music concerts and auto races, refinishing furniture, and reading romance novels.

50 Heartland Communities

Heartland Communities neighborhoods are preferred by approximately six million people. These neighborhoods can be found primarily in small towns in the Midwest and South. More than 75 percent of the households are single-family dwellings with a median home value of \$82,080. Most homes are older, built before 1960. The median age is 42.0 years; nearly one-third of the householders are aged 65 years or older. The distinctly country lifestyle of these residents is reflected in their interest in hunting, fishing, woodworking, playing bingo, and listening to country music. In addition to working on home improvement projects, they are avid gardeners and read gardening magazines. They participate in civic activities and take an interest in local politics. Residents order items from catalogs, QVC, and Avon sales representatives.

Source: ESRI, 2008 Estimates and Projections

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

Tapestry LifeMode Groups

2008 Households

	Number	Percent	Index
Total	2,760	100.0%	
L1. High Society	0	0.0%	0
01 Top Rung	0	0.0%	0
02 Suburban Splendor	0	0.0%	0
03 Connoisseurs	0	0.0%	0
04 Boomburbs	0	0.0%	0
05 Wealthy Seaboard Suburbs	0	0.0%	0
06 Sophisticated Squires	0	0.0%	0
07 Exurbanites	0	0.0%	0
L2. Upscale Avenues	233	8.4%	61
09 Urban Chic	0	0.0%	0
10 Pleasant-Ville	0	0.0%	0
11 Pacific Heights	0	0.0%	0
13 In Style	77	2.8%	112
16 Enterprising Professionals	0	0.0%	0
17 Green Acres	156	5.7%	181
18 Cozy and Comfortable	0	0.0%	0
L3. Metropolis	0	0.0%	0
20 City Lights	0	0.0%	0
22 Metropolitans	0	0.0%	0
45 City Strivers	0	0.0%	0
51 Metro City Edge	0	0.0%	0
54 Urban Rows	0	0.0%	0
62 Modest Income Homes	0	0.0%	0
L4. Solo Acts	0	0.0%	0
08 Laptops and Lattes	0	0.0%	0
23 Trendsetters	0	0.0%	0
27 Metro Renters	0	0.0%	0
36 Old and Newcomers	0	0.0%	0
39 Young and Restless	0	0.0%	0
L5. Senior Styles	567	20.5%	165
14 Prosperous Empty Nesters	0	0.0%	0
15 Silver and Gold	0	0.0%	0
29 Rustbelt Retirees	0	0.0%	0
30 Retirement Communities	0	0.0%	0
43 The Elders	0	0.0%	0
49 Senior Sun Seekers	0	0.0%	0
50 Heartland Communities	567	20.5%	942
57 Simple Living	0	0.0%	0
65 Social Security Set	0	0.0%	0

Source: ESRI, 2008 Estimates and Projections

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 in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

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

Tapestry LifeMode Groups

2008 Households

	Number	Percent	Index
Total	2,760	100.0%	
L6. Scholars & Patriots	0	0.0%	0
40 Military Proximity	0	0.0%	0
55 College Towns	0	0.0%	0
63 Dorms to Diplomas	0	0.0%	0
L7. High Hopes	0	0.0%	0
28 Aspiring Young Families	0	0.0%	0
48 Great Expectations	0	0.0%	0
L8. Global Roots	0	0.0%	0
35 International Marketplace	0	0.0%	0
38 Industrious Urban Fringe	0	0.0%	0
44 Urban Melting Pot	0	0.0%	0
47 Las Casas	0	0.0%	0
52 Inner City Tenants	0	0.0%	0
58 NeWest Residents	0	0.0%	0
60 City Dimensions	0	0.0%	0
61 High Rise Renters	0	0.0%	0
L9. Family Portrait	0	0.0%	0
12 Up and Coming Families	0	0.0%	0
19 Milk and Cookies	0	0.0%	0
21 Urban Villages	0	0.0%	0
59 Southwestern Families	0	0.0%	0
64 City Commons	0	0.0%	0
L10. Traditional Living	724	26.2%	297
24 Main Street, USA	0	0.0%	0
32 Rustbelt Traditions	0	0.0%	0
33 Midlife Junction	724	26.2%	1,049
34 Family Foundations	0	0.0%	0
L11. Factories & Farms	1,159	42.0%	441
25 Salt of the Earth	122	4.4%	160
37 Prairie Living	1,037	37.6%	3,720
42 Southern Satellites	0	0.0%	0
53 Home Town	0	0.0%	0
56 Rural Bypasses	0	0.0%	0
L12. American Quilt	77	2.8%	30
26 Midland Crowd	77	2.8%	76
31 Rural Resort Dwellers	0	0.0%	0
41 Crossroads	0	0.0%	0
46 Rooted Rural	0	0.0%	0
66 Unclassified	0	0.0%	0

Source: ESRI, 2008 Estimates and Projections

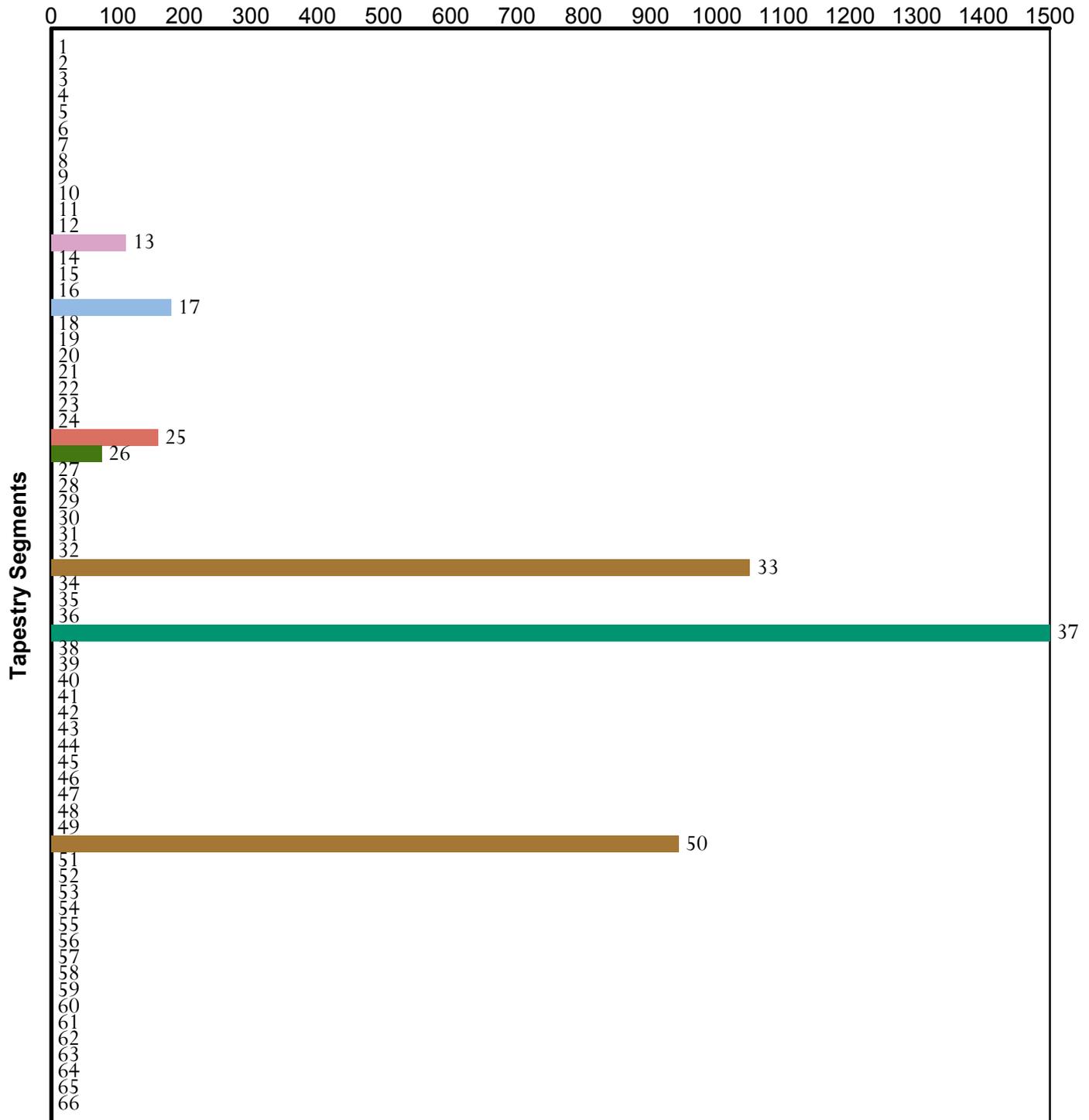
Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households in the area, by Tapestry segment, to the percent of households or population in the United States, by segment.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



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

Tapestry Index by Households

Index



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 population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Market Potential Summary

Based on the mix of customer demographics and lifestyles, we have knowledge of their media, leisure, and travel habits from national marketing data. Below are some highlights of this information, although full information on media, leisure, and travel habits is compiled in Appendices 2-4.

Media: How to reach your customers

A. Magazine Readership

<i>Product/consumer behavior:</i>	<i>Expected # of Housholds</i>	<i>Expected % of Households</i>	<i>MPI</i>
Light magazine reader	652	24%	116
Light-medium magazine reader	672	24%	122
Medium magazine reader	588	21%	107
Medium-heavy magazine reader	458	17%	83
Heavy magazine reader	389	14%	71
Read fishing/hunting magazines	516	19%	143
Read gardening magazines	148	5%	113
Read motorcycle magazines	110	4%	109

B. Newspaper Readership

Light newspaper reader	569	21%	100
Light-medium newspaper reader	520	19%	93
Medium newspaper reader	548	20%	99
Medium-heavy newspaper reader	565	20%	105
Heavy newspaper reader	558	20%	103
Read any daily newspaper	1425	52%	108
Read newspaper: classified section	1132	41%	117
Read newspaper: comics section	941	34%	115
Read newspaper: editorial page section	1068	39%	124

C. Radio Listenership

Light radio listener	664	24%	119
Light-medium radio listener	520	19%	95
Medium radio listener	527	19%	96
Medium-heavy radio listener	480	17%	87
Heavy radio listener	568	21%	103
Radio format listen to: country	1034	37%	177

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the household in the specified trade area to exhibit certain consumer behavior purchasing patterns compared to the US average. An MPI of 100 represents the US average.

Travel: *What travel products do your customers use?*

<i>Product/consumer behavior:</i>	<i>Expected # of Housholds</i>	<i>Expected % of Households</i>	<i>MPI</i>
Stayed 1+ nights at hotel/motel in last 12 months	1202	44%	100
Hotel/motel stayed in/12 mo: Comfort Inn	226	8%	143
Hotel/motel stayed in/12 mo: Days Inn	162	6%	115
Hotel/motel stayed in/12 mo: Econo Lodge	74	3%	126
Hotel/motel stayed in/12 mo: Super 8	156	6%	174
Domestic travel in last 12 months	1466	53%	97
Spent on domestic vacations last 12 mo: <\$1000	443	16%	111
Visited on domestic trip last 12 mo: North Central	539	20%	134

Leisure: *What types of activities do your customers engage in?*

Did woodworking in last 12 months	179	6%	114
Member of charitable organization	198	7%	125
Member of church board	224	8%	178
Member of veterans club	164	6%	168
Danced/went dancing in last 12 months	338	12%	101
Dined out in last 12 months	1436	52%	104
Dine out < once a month	138	5%	109
Dine out once a month	151	5%	88
Dine out 2-3 times a month	391	14%	120
Dine out once a week	323	12%	99
Attended country music performance in last 12 mo	175	6%	128
Played bingo in last 12 months	150	5%	127
Did birdwatching in last 12 months	185	7%	139
Participated in hunting with rifle	219	8%	149
Participated in hunting with shotgun	257	9%	205
Participated in horseback riding	103	4%	118
Participated in target shooting	119	4%	138
Participated in volleyball	156	6%	145
Participated in fishing (fresh water)	493	18%	128

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the household in the specified trade area to exhibit certain consumer behavior purchasing patterns compared to the US average. An MPI of 100 represents the US average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households. Please see Appendix 1 for more detail on data and methodology. .

Recommendations: Business Opportunities

Introduction:

In April, 2009 a retail study group consisting of local retailers and business leaders met and looked over the initial findings of the report and the Retail Gap Analysis in particular. Based on this information and their local knowledge of the market, the retail study group came up with a few preliminary recommendations for retail business opportunities:

1. Home Appliance/Home Furnishing
2. Used Merchandise Store
3. General Rental
4. Limited Service Eating
5. Automotive Body Work
6. Pet Grooming
7. Sporting Goods Store

Results of the Market Area Profile were presented on May 27, 2009 at a community workshop. Attendees (n=20) choose their top three store formats from the preliminary recommendations using anonymous voting. The voting prioritized store formats to identify those of greatest need and possibility of success:

- Used Merchandise Store
- Home Appliance/Home Furnishing
- General Rental
- Pet Grooming

Table 1: Result of voting on preliminary recommendations

Please rank your top three	Responses	
Home Appliance/Furnishings	12	20.34%
Used Merchandise Store	15	25.42%
General Rental	10	16.95%
Limited Service Eating	6	10.17%
Pet Grooming	9	15.25%
Sporting Goods Store	7	11.86%
Totals	59	100%

*These are only recommendations to identify business opportunities in the local market. Any entrepreneur should engage in business planning to vet these recommendations before pursuing a business launch.

Retail Gap Analysis: Greater NE Fillmore

This report estimates the potential number of businesses across 73 store categories based on the spending of the area residents (demand) compared to the number of stores in the trade area (supply). Those categories where demand is greater than supply are opportunities for businesses development. Demand estimates are calculated from US Economic Census data and supply listings are from InfoUSA, which compiles a national database of businesses (see Appendix 1 for more details).

NAICS	Name	MN Sales Per Capita	Average Sales per MN Store	Potential Sales in Trade Area	No. of Stores (Demand)	No. of Stores (Supply)*	Potential Stores (Demand - Supply)
Vehicle, Furniture, and Building Materials							
44111	New car dealers	\$ 2,596	\$23,849,936	\$ 17,421,304	0.7	0	0.7
44112	Used car dealers **	\$ 185	\$ 660,285	\$ 1,239,861	1.9	2	-0.1
44121	Recreational vehicle dealers **	\$ 68	\$ 2,031,511	\$ 458,386	0.2	0	0.2
44122	Motorcycle, boat, & other motor vehicles**	\$ 211	\$ 1,425,017	\$ 1,418,763	1.0	2	-1.0
4413	Automotive parts, accessories, & tire stores	\$ 243	\$ 827,757	\$ 1,630,311	2.0	2	0.0
4421	Furniture stores	\$ 213	\$ 1,749,541	\$ 1,429,621	0.8	0	0.8
4422	Home furnishings stores	\$ 191	\$ 861,742	\$ 1,283,095	1.5	0	1.5
44311	Appliance, television, & other electronics stores	\$ 353	\$ 2,165,660	\$ 2,365,974	1.1	0	1.1
44312	Computer & software stores	\$ 67	\$ 1,042,462	\$ 446,517	0.4	0	0.4
44313	Camera & photographic supplies stores	\$ 19	\$ 1,025,277	\$ 128,087	0.1	0	0.1
44411	Home centers	\$ 421	\$14,860,573	\$ 2,822,673	0.2	0	0.2
44412	Paint & wallpaper stores	\$ 34	\$ 1,087,977	\$ 228,845	0.2	0	0.2
44413	Hardware stores	\$ 114	\$ 1,078,077	\$ 765,498	0.7	2	-1.3
44419	Specialized building material dealers	\$ 489	\$ 2,218,778	\$ 3,283,862	1.5	1	0.5
4442	Lawn & garden equipment & supplies stores	\$ 289	\$ 2,004,603	\$ 1,939,585	1.0	2	-1.0
Food, Health, and General Merchandise							
4451	Grocery stores	\$ 1,633	\$ 5,470,174	\$ 10,955,095	2.0	3	-1.0
4452	Specialty food stores**	\$ 44	\$ 250,253	\$ 297,965	1.2	4	-2.8
4453	Beer, wine, & liquor stores	\$ 224	\$ 1,097,532	\$ 1,504,058	1.4	3	-1.6
44611	Pharmacies & drug stores	\$ 493	\$ 4,007,090	\$ 3,310,114	0.8	1	-0.2
44612	Cosmetics, beauty supplies, perfume stores**	\$ 19	\$ 77,361	\$ 129,486	1.7	1	0.7
44613	Optical goods stores	\$ 31	\$ 505,027	\$ 204,730	0.4	0	0.4
44619	Other health care (vitamin, medical equip)**	\$ 43	\$ 230,709	\$ 288,812	1.3	0	1.3
4471	Gasoline stations	\$ 1,213	\$ 2,328,291	\$ 8,138,484	3.5	3	0.5
452	General merchandise stores	\$ 1,888	\$ 9,367,753	\$ 12,670,380	1.4	2	-0.6
Clothing							
44811	Men's clothing stores	\$ 22	\$ 710,286	\$ 144,875	0.2	0	0.2
44812	Women's clothing stores	\$ 104	\$ 781,287	\$ 695,192	0.9	1	-0.1
44813	Children's & infants' clothing stores	\$ 22	\$ 802,958	\$ 145,352	0.2	0	0.2
44814	Family clothing stores	\$ 217	\$ 2,141,328	\$ 1,454,954	0.7	0	0.7
44815	Clothing accessories stores**	\$ 9	\$ 166,937	\$ 62,566	0.4	0	0.4
44819	Specialized clothing stores (dress, etc)**	\$ 30	\$ 314,183	\$ 202,262	0.6	0	0.6
44821	Shoe stores	\$ 66	\$ 736,215	\$ 441,105	0.6	0	0.6
44831	Jewelry stores	\$ 84	\$ 562,839	\$ 561,087	1.0	2	-1.0
44832	Luggage & leather goods stores	\$ 4	\$ 449,951	\$ 24,091	0.1	0	0.1
Leisure Goods							
45111	Sporting goods stores	\$ 177	\$ 880,427	\$ 1,188,579	1.4	1	0.4
45112	Hobby, toy, & game stores**	\$ 55	\$ 527,447	\$ 367,122	0.7	0	0.7
45113	Sewing, needlework, & piece goods stores**	\$ 28	\$ 253,456	\$ 187,077	0.7	0	0.7
45114	Musical instrument & supplies stores**	\$ 26	\$ 603,096	\$ 172,985	0.3	0	0.3
45121	Traveler accommodation	\$ 56	\$ 414,203	\$ 374,368	0.9	1	-0.1
45122	Tape, compact disc, & record stores	\$ 19	\$ 560,296	\$ 127,853	0.2	0	0.2

NAICS	Name	MN Sales Per Capita	Sales per Ave. MN Store	Potential Sales in Trade Area	No. of Stores (Demand)	No. of Stores (Supply)*	Potential Stores (Demand Supply)
Miscellaneous Retail							
4531	Florists	\$ 41	\$ 253,814	\$ 277,615	1.1	2	-0.9
45321	Office supplies & stationery stores	\$ 62	\$ 1,413,141	\$ 417,939	0.3	0	0.3
45322	Gift, novelty, & souvenir stores**	\$ 84	\$ 218,920	\$ 561,225	2.6	6	-3.4
4533	Used merchandise stores	\$ 36	\$ 120,809	\$ 241,790	2.0	1	1.0
45391	Pet & pet supplies stores	\$ 36	\$ 629,999	\$ 240,935	0.4	0	0.4
45392	Art dealers**	\$ 11	\$ 134,523	\$ 74,941	0.6	2	-1.4
45393	Manufactured (mobile) home dealers	\$ 39	\$ 2,113,960	\$ 261,401	0.1	0	0.1
51213	Motion picture & video exhibition**	\$ 41	\$ 508,869	\$ 277,644	0.5	0	0.5
54192	Photographic services	\$ 75	\$ 721,509	\$ 504,955	0.7	3	-2.3
Rental							
5321	Automotive equipment rental & leasing	\$ 185	\$ 5,065,240	\$ 1,239,767	0.2	0	0.2
53222	Formal wear & costume rental**	\$ 4	\$ 271,278	\$ 30,087	0.1	0	0.1
53223	Video tape & disc rental	\$ 31	\$ 415,012	\$ 205,273	0.5	0	0.5
5323	General rental centers**	\$ 20	\$ 49,757	\$ 137,263	2.8	0	2.8
Amusement and Recreation							
7131	Amusement parks & arcades**	\$ 27	\$ 51,030	\$ 178,242	3.5	0	3.5
7139	Other amusement (bowling, golf, fitness)	\$ 230	\$ 508,628	\$ 1,542,528	3.0	7	-4.0
Accommodation and Food Services							
7211	Traveler accommodation	\$ 460	\$ 1,673,589	\$ 3,085,006	1.8	26	-24.2
7212	RV parks & recreational camps**	\$ 25	\$ 218,442	\$ 165,967	0.8	3	-2.2
7221	Full-service restaurants	\$ 597	\$ 829,891	\$ 4,007,465	4.8	15	-10.2
7222	Limited-service eating places	\$ 491	\$ 499,216	\$ 3,292,075	6.6	0	6.6
7224	Drinking places (alcoholic beverages)	\$ 78	\$ 321,765	\$ 522,162	1.6	1	0.6
Auto and Equipment Services							
81111	Automotive mechanical & electrical repair**	\$ 203	\$ 242,487	\$ 1,363,218	5.6	5	0.6
81112	Automotive body, paint, interior, & glass**	\$ 153	\$ 308,050	\$ 1,027,694	3.3	2	1.3
81119	Other automotive repair & maintenance**	\$ 47	\$ 189,052	\$ 317,641	1.7	1	0.7
81141	Home/garden equipment & appliance repair**	\$ 14	\$ 90,125	\$ 93,061	1.0	1	0.0
81142	Reupholstery & furniture repair**	\$ 8	\$ 66,137	\$ 56,151	0.8	2	-1.2
81143	Footwear & leather goods repair**	\$ 1	\$ 65,556	\$ 7,438	0.1	0	0.1
81149	Personal goods repair (watch, boat, garment) **	\$ 32	\$ 36,396	\$ 215,236	5.9	0	5.9
Personal Services							
812111	Barber shops**	\$ 6	\$ 27,235	\$ 43,503	1.6	1	0.6
812112	Beauty salons**	\$ 118	\$ 74,988	\$ 791,902	10.6	9	1.6
812113	Nail salons**	\$ 9	\$ 43,930	\$ 60,986	1.4	0	1.4
81219	Other personal care services**	\$ 22	\$ 51,882	\$ 149,935	2.9	4	-1.1
81231	Coin-operated laundries & drycleaners**	\$ 8	\$ 122,184	\$ 56,541	0.5	0	0.5
81232	Drycleaning & laundry (except coin-operated)	\$ 23	\$ 297,567	\$ 155,907	0.5	0	0.5
81291	Pet care (except veterinary) services**	\$ 9	\$ 40,375	\$ 60,889	1.5	1	0.5
81292	Photofinishing**	\$ 22	\$ 291,245	\$ 145,169	0.5	0	0.5

* Existing store records are from a national business database from InfoUSA and compiled from public sources including the Yellow Pages and annual reports. Care should be taken to investigate actual local conditions, including the number of operating businesses in any NAICS category.

** Denotes a store category with a high level of non-employers (over 40% of all MN businesses)

Appendix I: Data and Methodology

Tapestry Segmentation Profile:

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, Travel and Leisure Market Potential:

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.

Market Potential 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 Gap Analysis:

The retail gap analysis is a basic comparison of the demand for retail goods and services in an area and the supply of retail goods and services in the same area. Store categories where demand is greater than supply hold opportunity for business development and possible investigation.

Demand Data and Methodology:

Demand is calculated from 2002 US Economic Census data updated for inflation. The US Economic Census is a federally-mandated census of businesses, which surveys all medium, large, and multi-establishment firms as well as compiles data on small firms and select industries from other federal administration records.

Of particular note are the gross sales estimates per stores category (NAICS code), which we use to calculate demand. Only Minnesota data were used to represent local consumption patterns and calculate per capita spending. For each Market Area Profile, the population of the target trade area is multiplied by per capita spending across all store categories, giving an estimate of gross sales demand. To best illustrate a store gap, total sales are converted into store equivalents using the average sales per store in each category.

Supply Data and Methodology:

Supply data is from InfoUSA, a national private business data compiler. The company collects information on over 12 million private and public US companies from various public data sources, including yellow pages, annual reports, and others business directories. For each Market Area Profile, business listings in the target area are sorted according to store category (NAICS code) and matched with the demand estimate in the same category for comparison.



Market Potential: Media

NE Fillmore

Total 2008 Households: 2,760

Product/Consumer Behavior	<i>Expected Number of Households</i>	<i>Expected Percent of Households</i>	<i>MPI</i>
Light viewer of daytime TV	309	11%	112
Medium viewer of daytime TV	262	9%	94
Heavy viewer of daytime TV	243	9%	87
Light viewer of primetime TV	590	21%	107
Light-medium viewer of primetime TV	524	19%	95
Medium viewer of primetime TV	526	19%	95
HH watched 15+ hours of cable TV last week	1446	52%	96
Watched 1-9 hours of cable TV last week	2003	73%	98
Watched 10-20 hours of cable TV last week	634	23%	116
Watched 21+ hours of cable TV last week	159	6%	128
Watched last week: A&E Television Network	540	20%	94
Watched last week: ABC Family Channel	606	22%	111
HH has cable TV available in neighborhood	2089	76%	83
HH subscribes to cable TV	1537	56%	88
HH subscribes to digital cable TV	360	13%	102
HH has pay TV	657	24%	79
HH has satellite dish	662	24%	150
HH watched cable TV last week	2022	73%	99
Medium-heavy viewer of primetime TV	564	20%	102
Heavy viewer of primetime TV	557	20%	101
Light magazine reader	652	24%	116
Light-medium magazine reader	672	24%	122
Medium magazine reader	588	21%	107
Medium-heavy magazine reader	458	17%	83
Heavy magazine reader	389	14%	71
Read airline magazines	93	3%	62
Read automotive magazines	334	12%	89
Read baby magazines	129	5%	87
Read boating magazines	63	2%	79
Read bridal magazines	96	3%	77
Read business/finance magazines	334	12%	70
Read computer magazines	135	5%	71

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the household in the specified trade area to exhibit certain consumer behavior purchasing patterns compared to the US average. An MPI of

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally

<i>Product/Consumer Behavior</i>	<i>Expected Number of Households</i>	<i>Expected Percent of Households</i>	<i>MPI</i>
Read Epicurean magazines	86	3%	61
Read fishing/hunting magazines	516	19%	143
Read gardening magazines	148	5%	113
Read general editorial magazines	1205	44%	91
Read health magazines	333	12%	95
Read home service magazines	1043	38%	108
Read motorcycle magazines	110	4%	109
Read music magazines	308	11%	90
Read news - weekly magazines	876	32%	74
Read parenthood magazines	319	12%	80
Read science/technology magazines	144	5%	77
Read sports magazines	302	11%	72
Read travel magazines	178	6%	70
Read women's fashion magazines	98	4%	56
Light newspaper reader	569	21%	100
Light-medium newspaper reader	520	19%	93
Medium newspaper reader	548	20%	99
Medium-heavy newspaper reader	565	20%	105
Heavy newspaper reader	558	20%	103
Read any daily newspaper	1425	52%	108
Read one daily newspaper	1113	40%	106
Read two or more daily newspapers	312	11%	113
Read any Sunday newspaper	1585	57%	98
Read one Sunday newspaper	1326	48%	96
Read two or more Sunday newspapers	259	9%	111
Read newspaper: business/finance section	719	26%	88
Read newspaper: classified section	1132	41%	117
Read newspaper: comics section	941	34%	115
Read newspaper: editorial page section	1068	39%	124
Read newspaper: fashion section	389	14%	97
Read newspaper: food/cooking section	674	24%	96
Read newspaper: general news section	1719	62%	106
Read newspaper: home/furnishings/gardening section	561	20%	99
Read newspaper: movie listings/reviews section	586	21%	81
Read newspaper: science & technology section	386	14%	81
Read newspaper: sports section	1004	36%	107
Read newspaper: travel section	413	15%	78
Read newspaper: TV/radio listings section	687	25%	102
Light radio listener	664	24%	119
Light-medium radio listener	520	19%	95
Medium radio listener	527	19%	96
Medium-heavy radio listener	480	17%	87
Heavy radio listener	568	21%	103
Radio format listen to: adult contemporary	456	17%	92
Radio format listen to: all news	54	2%	35

<i>Product/Consumer Behavior</i>	<i>Expected Number of Households</i>	<i>Expected Percent of Households</i>	<i>MPI</i>
Radio format listen to: all talk	61	2%	55
Radio format listen to: alternative	153	6%	57
Radio format listen to: classic hits	87	3%	70
Radio format listen to: classic rock	272	10%	92
Radio format listen to: classical	61	2%	56
Radio format listen to: contemporary hit radio	379	14%	73
Radio format listen to: country	1034	37%	177
Radio format listen to: Hispanic	77	3%	49
Radio format listen to: jazz	53	2%	43
Radio format listen to: news/talk	267	10%	84
Radio format listen to: oldies	327	12%	104
Radio format listen to: public	59	2%	72
Radio format listen to: religious	190	7%	128
Radio format listen to: rock	229	8%	73
Radio format listen to: soft adult contemporary	111	4%	61
Radio format listen to: sports	83	3%	70
Radio format listen to: urban	162	6%	47
Radio format listen to: variety/other	189	7%	81
Radio listening: auto racing (NASCAR)	220	8%	130
Radio listening: baseball playoffs/World Series	241	9%	99
Radio listening: baseball (regular season)	284	10%	102
Radio listening: basketball (college)	216	8%	136
Radio listening: basketball (pro)	150	5%	93
Radio listening: football (college)	333	12%	140
Radio listening: football-Monday night (pro)	212	8%	122
Radio listening: football-weekend (pro)	284	10%	111
Radio listening: golf	88	3%	121
Radio listening: ice hockey	73	3%	75
Radio listening: NFL playoffs/Superbowl	188	7%	109
Listen to Radio: 6:00 am - 10:00 am weekday	1442	52%	97
Listen to Radio: 10:00 am - 3:00 pm weekday	1049	38%	99
Listen to Radio: 3:00 pm - 7:00 pm weekday	1093	40%	88
Listen to Radio: 7:00 pm - midnight weekday	378	14%	86
Listen to Radio: midnight - 6:00 am weekday	125	5%	85
Listen to Radio: 6:00 am - 10:00 am weekend	930	34%	106
Listen to Radio: 10:00 am - 3:00 pm weekend	1022	37%	87
Listen to Radio: 3:00 pm - 7:00 pm weekend	810	29%	88
Listen to Radio: 7:00 pm - midnight weekend	356	13%	78
Listen to Radio: midnight - 6:00 am weekend	118	4%	92

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the household in the specified trade area to exhibit certain consumer behavior purchasing patterns compared to the US average. An MPI of

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally



Market Potential: Travel

NE Fillmore

Total 2008 Households: 2,760

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Member of 1 frequent flyer program	154	6%	62
Member of 2 frequent flyer programs	70	3%	51
Member of 3+ frequent flyer programs	41	1%	42
Stayed 1+ nights at hotel/motel in last 12 months	1202	44%	100
Hotel/motel stayed in/12 mo: Best Western	236	9%	112
Hotel/motel stayed in/12 mo: Comfort Inn	226	8%	143
Hotel/motel stayed in/12 mo: Courtyard	48	2%	70
Hotel/motel stayed in/12 mo: Days Inn	162	6%	115
Hotel/motel stayed in/12 mo: Econo Lodge	74	3%	126
Hotel/motel stayed in/12 mo: Embassy Suites	58	2%	83
Hotel/motel stayed in/12 mo: Fairfield Inn	67	2%	106
Hotel/motel stayed in/12 mo: Hampton Inn	121	4%	110
Hotel/motel stayed in/12 mo: Hilton	71	3%	72
Hotel/motel stayed in/12 mo: Holiday Inn	202	7%	115
Hotel/motel stayed in/12 mo: Holiday Inn Express	108	4%	111
Hotel/motel stayed in/12 mo: Marriott	99	4%	72
Hotel/motel stayed in/12 mo: Motel 6	61	2%	88
Hotel/motel stayed in/12 mo: Ramada Inn	86	3%	111
Hotel/motel stayed in/12 mo: Super 8	156	6%	174
Domestic travel in last 12 months	1466	53%	97
Spent on domestic vacations last 12 mo: <\$1000	443	16%	111
Spent on domestic vacations last 12 mo: \$1000-1499	188	7%	91
Spent on domestic vacations last 12 mo: \$1500-1999	89	3%	78
Spent on domestic vacations last 12 mo: \$2000-2999	87	3%	84
Spent on domestic vacations last 12 mo: \$3000+	82	3%	75
Domestic travel for business in last 12 months	202	7%	86
Domestic travel for personal reasons in last 12 mo	439	16%	100
Domestic travel for vacation/honeymoon last 12 mo	989	36%	97
Took 3+ domestic trips by plane in last 12 months	115	4%	54
Took 3+ domestic business trips by plane/12 months	40	1%	50
Took 3+ domestic non-business trips by plane/12 mo	58	2%	49
Airline used for domestic trip/12 mo: American	90	3%	75

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the household in the specified trade area to exhibit certain consumer behavior purchasing patterns compared to the US average. An MPI of

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally

<i>Product/Consumer Behavior</i>	<i>Expected Number of Households</i>	<i>Expected Percent of Households</i>	<i>MPI</i>
Airline used for domestic trip/12 mo: Continental	32	1%	41
Airline used for domestic trip/12 mo: Delta	83	3%	66
Airline used for domestic trip/12 mo: Northwest	71	3%	86
Airline used for domestic trip/12 mo: Southwest	91	3%	70
Airline used for domestic trip/12 mo: United	68	2%	66
Airline used for domestic trip/12 mo: US Airways	67	2%	77
Rented car on domestic trip in last 12 months	110	4%	73
Visited on domestic trip last 12 mo: Northeast	263	10%	78
Visited on domestic trip last 12 mo: South	780	28%	96
Visited on domestic trip last 12 mo: North Central	539	20%	134
Visited on domestic trip last 12 mo: West	405	15%	80
Went backpacking/hiking on domestic vacation/12 mo	72	3%	84
Went to beach on domestic vacation in last 12 mo	250	9%	80
Played golf on domestic vacation in last 12 months	54	2%	75
Visited National Park on domestic vacation/12 mo	169	6%	100
Foreign travel in last 3 years	485	18%	73
Spent on foreign vacations last 12 mo: <\$1000	97	3%	66
Spent on foreign vacations last 12 mo: \$1000-2999	96	3%	87
Spent on foreign vacations last 12 mo: \$3000+	63	2%	60
Foreign travel for personal reasons in last 3 yrs	78	3%	65
Foreign travel for vacation/honeymoon last 3 yrs	362	13%	73
Took foreign trip w/all-inclusive travel pkg/3 yrs	213	8%	92
Took foreign trip by cruise ship in last 3 yrs	94	3%	76
Took 3+ foreign trips by plane in last 3 yrs	56	2%	49
Took 3+ foreign vacation trips by plane last 3 yrs	43	2%	49
Airline used for foreign trip/3 yrs: American	91	3%	72
Airline used for foreign trip/3 yrs: British Air	29	1%	65
Airline used for foreign trip/3 yrs: Continental	30	1%	52
Airline used for foreign trip/3 yrs: Delta	75	3%	79
Airline used for foreign trip/3 yrs: Northwest	75	3%	129
Airline used for foreign trip/3 yrs: United	55	2%	58
Visited on foreign trip last 3 yrs: Canada	94	3%	80
Visited on foreign trip last 3 yrs: France	36	1%	46
Visited on foreign trip last 3 yrs: Germany	40	1%	65
Visited on foreign trip last 3 yrs: Hawaii	50	2%	71
Visited on foreign trip last 3 yrs: Italy	33	1%	49
Visited on foreign trip last 3 yrs: Mexico	132	5%	80
Visited on foreign trip last 3 yrs: United Kingdom	47	2%	58
Bought travelers checks in last 12 months	206	7%	104
Took cruise of more than one day in last 3 years	164	6%	77
Member of any frequent flyer program	230	8%	48

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the household in the specified trade area to exhibit certain consumer behavior purchasing patterns compared to the US average. An MPI of

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally



Market Potential: Leisure

NE Fillmore

Total 2008 Households: 2,760

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Cooked for fun in last 12 months	398	14%	89
Did crossword puzzle in last 12 months	441	16%	104
Flew a kite in last 12 months	109	4%	106
Did furniture refinishing in last 12 months	125	5%	101
Did indoor gardening/plant care in last 12 months	497	18%	104
Bought lottery ticket in last 12 months	927	34%	89
Bought lottery ticket in last 12 mo: Daily Drawing	99	4%	69
Bought lottery ticket in last 12 mo: Instant Game	434	16%	94
Bought lottery ticket in last 12 mo: Lotto Drawing	645	23%	92
Played lottery: <2 times in last 30 days	302	11%	87
Played lottery: 2-5 times in last 30 days	289	10%	83
Played lottery: 6+ times in last 30 days	336	12%	98
Played musical instrument in last 12 months	184	7%	87
Did painting/drawing in last 12 months	201	7%	101
Did photography in last 12 months	310	11%	91
Read book in last 12 months	1085	39%	99
Surfed the Internet in last 12 months	659	24%	88
Played video game in last 12 months	324	12%	89
Did woodworking in last 12 months	179	6%	114
Member of business club	70	3%	98
Member of charitable organization	198	7%	125
Member of church board	224	8%	178
Member of fraternal order	135	5%	108
Member of religious club	277	10%	128
Member of school or college board	44	2%	82
Member of union	137	5%	90
Member of veterans club	164	6%	168
Attended adult education course in last 12 months	137	5%	75
Attended auto show in last 12 months	200	7%	89
Went to bar/night club in last 12 months	554	20%	96
Went to beach in last 12 months	513	19%	75
Attended dance performance in last 12 months	79	3%	74
Danced/went dancing in last 12 months	338	12%	101
Dined out in last 12 months	1436	52%	104
Dine out < once a month	138	5%	109
Dine out once a month	151	5%	88
Dine out 2-3 times a month	391	14%	120
Dine out once a week	323	12%	99
Dine out 2+ times per week	290	11%	99

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the household in the specified trade area to exhibit certain consumer behavior purchasing patterns compared to the US average. An MPI of 100 represents the US average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Gambled at casino in last 12 months	431	16%	85
Gambled at casino 6+ times in last 12 months	54	2%	79
Gambled in Atlantic City in last 12 months	48	2%	49
Gambled in Las Vegas in last 12 months	98	4%	61
Attended horse races in last 12 months	47	2%	62
Attended movies in last 6 months	1445	52%	86
Attended movies in last 90 days: < once a month	775	28%	94
Attended movies in last 90 days: once a month	258	9%	86
Attended movies in last 90 days: 2-3 times a month	140	5%	61
Attended movies in last 90 days: once/week or more	53	2%	57
Prefer to see movie after second week of release	638	23%	86
Went to museum in last 12 months	257	9%	67
Attended music performance in last 12 months	560	20%	85
Attended country music performance in last 12 mo	175	6%	128
Attended rock music performance in last 12 months	196	7%	71
Went to live theater in last 12 months	334	12%	82
Visited a theme park in last 12 months	485	18%	72
Visited Disneyland (CA) in last 12 months	48	2%	52
Visited Disney World (FL)/12 mo: Animal Kingdom	61	2%	78
Visited Disney World (FL)/12 mo: Epcot Center	64	2%	73
Visited Disney World (FL)/12 mo: Magic Kingdom	80	3%	77
Visited Disney World (FL)/12 mo: MGM Studios	56	2%	72
Visited any Sea World in last 12 months	71	3%	75
Visited any Six Flags in last 12 months	121	4%	63
Visited Universal Studios (FL) in last 12 months	51	2%	70
Went to zoo in last 12 months	237	9%	72
Played backgammon in last 12 months	45	2%	65
Played billiards/pool in last 12 months	190	7%	77
Played bingo in last 12 months	150	5%	127
Did birdwatching in last 12 months	185	7%	139
Played board game in last 12 months	411	15%	88
Played cards in last 12 months	674	24%	114
Played chess in last 12 months	87	3%	73
Participated in hunting with rifle	219	8%	149
Participated in hunting with shotgun	257	9%	205
Participated in ice skating	68	2%	85
Play golf once a month	43	2%	105
Play golf 2-3 times a month	38	1%	85
Participated in horseback riding	103	4%	118
Participated in jogging/running	221	8%	80
Participated in motorcycling	91	3%	108
Participated in roller blading	69	2%	78
Participated in roller skating	59	2%	94
Participated in snorkeling	42	2%	66

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Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Participated in soccer	50	2%	57
Participated in softball	140	5%	108
Participated in swimming	435	16%	86
Participated in target shooting	119	4%	138
Participated in tennis	73	3%	62
Participated in volleyball	156	6%	145
Participated in walking for exercise	944	34%	105
Participated in water skiing	59	2%	112
Participated in weight lifting	211	8%	72
Participated in yoga	79	3%	74
Spent on high end sports/rec equip/12 mo: <\$100	70	3%	96
Spent on high end sports/rec equip/12 mo: \$100-249	69	2%	102
Spent on high end sports/rec equip/12 mo: \$250+	85	3%	93
Attend sports event: auto racing (NASCAR)	141	5%	110
Attend sports event: auto racing (not NASCAR)	111	4%	102
Attend sports event: baseball game	280	10%	78
Attend sports event: basketball game (college)	138	5%	95
Attend sports event: basketball game (pro)	119	4%	72
Attend sports event: football game (college)	207	8%	105
Attend sports event: football-Mon night game (pro)	79	3%	102
Attend sports event: football-weekend game (pro)	114	4%	71
Attend sports event: golf tournament	76	3%	88
Attend sports event: ice hockey game	100	4%	76
Attend sports event: soccer game	77	3%	81
Participated in aerobics	191	7%	74
Participated in archery	77	3%	133
Participated in auto racing	60	2%	100
Participated in backpacking/hiking	181	7%	84
Participated in baseball	125	5%	83
Participated in basketball	238	9%	91
Participated in bicycling (mountain)	78	3%	69
Participated in bicycling (road)	244	9%	91
Participated in boating (power)	208	8%	114
Participated in bowling	289	10%	92
Participated in canoeing/kayaking	110	4%	88
Participated in downhill skiing	84	3%	80
Participated in fishing (fresh water)	493	18%	128
Participated in fishing (salt water)	112	4%	81
Participated in football	116	4%	84
Participated in Frisbee	109	4%	86
Participated in golf	304	11%	94
Play golf < once a month	88	3%	74

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the household in the specified trade area to exhibit certain consumer behavior purchasing patterns compared to the US average. An MPI of 100 represents the US average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediamark Research Inc. in a nationally representative survey of US households.