



Hawley Market Area Profile, May, 2011

This report profiles the customer base of the Hawley trade area and analyzes the potential for retail and some service opportunities.

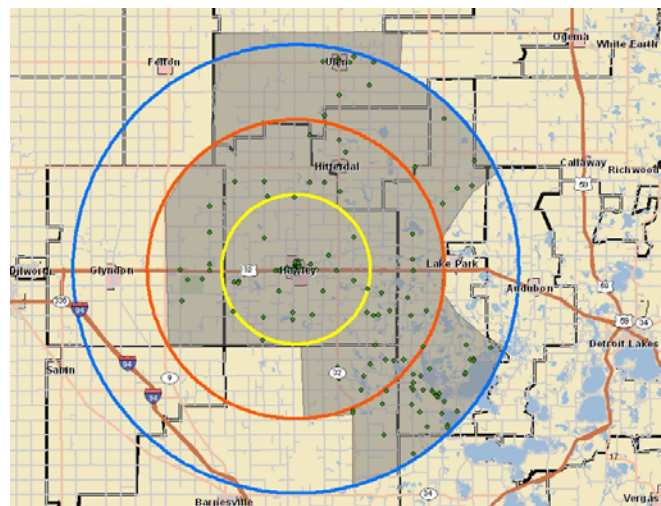
Results based on an analysis from multiple datasources, compiled using Business Analyst from ESRI (www.esri.com).

See Appendix 1 : *Data and Methodology* for more details.

How large is the local retail market ?

The local market is made up of local residents. 7,681 people live in 3,030 households, whose estimated *potential* retail purchases account for \$62 Million.

The Hawley EDA board choose an area generally 10 miles around Hawley but also reaching to Ulen to the north and into lakes country to the southeast as a reasonable trade area for this analysis (see figure to right).



What do we know about households in the trade area?

Median Household Income	\$50,024	Average Household Size	2.47
		Median Age	43.9

What do we know about housing in the trade area ?

Median home value	\$133,862	Renter Occupied Units	10% of total
-------------------	-----------	-----------------------	--------------

Hawley 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, 2011 by Ryan Pesch, Extension Educator, University of Minnesota Extension.

Sponsor: Hawley Economic Development Authority

A special thank you to all members of the local retail study group for their input and direction given to the project.

Table of Contents

1. Market Profile	Page 2-7
2. Lifestyle Profile	Page 8-13
3. Media and Internet Marketing Profile	Page 14-20
4. Retail Gap Analysis	Page 21-25
5. Special Gap Analysis on Trades/Others	Page 26
6. Appendix 1: Data and Methodology	Page 27-28

	Hawley Trade Area	Minnesota (27)
Population Summary		
2000 Total Population	7,266	4,919,479
2000 Group Quarters	118	135,883
2010 Total Population	7,681	5,334,772
2015 Total Population	7,933	5,461,840
2010-2015 Annual Rate	0.65%	0.47%
Household Summary		
2000 Households	2,762	1,895,127
2000 Average Household Size	2.59	2.52
2010 Households	3,030	2,092,019
2010 Average Household Size	2.50	2.48
2015 Households	3,167	2,150,988
2015 Average Household Size	2.47	2.47
2010-2015 Annual Rate	0.89%	0.56%
2000 Families	2,076	1,255,141
2000 Average Family Size	3.02	3.09
2010 Families	2,194	1,344,483
2010 Average Family Size	2.96	3.06
2015 Families	2,266	1,369,275
2015 Average Family Size	2.94	3.06
2010-2015 Annual Rate	0.65%	0.37%
Housing Unit Summary		
2000 Housing Units	3,683	2,065,946
Owner Occupied Housing Units	64.3%	68.4%
Renter Occupied Housing Units	10.5%	23.3%
Vacant Housing Units	25.2%	8.3%
2010 Housing Units	4,389	2,363,660
Owner Occupied Housing Units	58.6%	65.5%
Renter Occupied Housing Units	10.4%	23.0%
Vacant Housing Units	31.0%	11.5%
2015 Housing Units	4,667	2,469,289
Owner Occupied Housing Units	57.0%	64.6%
Renter Occupied Housing Units	10.9%	22.5%
Vacant Housing Units	32.1%	12.9%
Median Household Income		
2000	\$41,656	\$47,143
2010	\$50,024	\$62,263
2015	\$55,868	\$71,050
Median Home Value		
2000	\$86,528	\$118,064
2010	\$133,862	\$163,064
2015	\$162,541	\$188,222
Per Capita Income		
2000	\$18,325	\$23,198
2010	\$22,461	\$30,224
2015	\$25,883	\$35,001
Median Age		
2000	40.2	35.4
2010	43.9	37.0
2015	44.8	37.2

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 years and over divided by the total population. Detail may not sum to totals due to rounding.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

	Hawley Trade Area	Minnesota (27)
2000 Households by Income		
Household Income Base	2,743	1,896,209
<\$15,000	13.5%	12.1%
\$15,000 - \$24,999	14.4%	11.4%
\$25,000 - \$34,999	13.4%	12.4%
\$35,000 - \$49,999	19.5%	17.0%
\$50,000 - \$74,999	23.7%	22.4%
\$75,000 - \$99,999	8.9%	12.1%
\$100,000 - \$149,999	4.9%	8.3%
\$150,000 - \$199,999	0.9%	2.1%
\$200,000+	0.8%	2.2%
Average Household Income	\$47,939	\$59,348
2010 Households by Income		
Household Income Base	3,030	2,092,018
<\$15,000	9.9%	7.8%
\$15,000 - \$24,999	10.6%	8.1%
\$25,000 - \$34,999	10.1%	8.2%
\$35,000 - \$49,999	19.4%	14.1%
\$50,000 - \$74,999	26.5%	22.9%
\$75,000 - \$99,999	15.1%	16.3%
\$100,000 - \$149,999	6.1%	15.0%
\$150,000 - \$199,999	1.5%	4.0%
\$200,000+	0.9%	3.5%
Average Household Income	\$56,266	\$76,097
2015 Households by Income		
Household Income Base	3,168	2,150,987
<\$15,000	9.2%	6.8%
\$15,000 - \$24,999	8.3%	6.0%
\$25,000 - \$34,999	8.6%	6.6%
\$35,000 - \$49,999	15.6%	10.5%
\$50,000 - \$74,999	27.2%	22.8%
\$75,000 - \$99,999	17.0%	15.9%
\$100,000 - \$149,999	10.0%	20.5%
\$150,000 - \$199,999	2.5%	6.0%
\$200,000+	1.5%	4.9%
Average Household Income	\$64,082	\$87,797
2000 Owner Occupied Housing Units by Value		
Total	2,367	1,412,724
<\$50,000	21.0%	11.1%
\$50,000 - \$99,999	38.7%	27.6%
\$100,000 - \$149,999	22.1%	30.3%
\$150,000 - \$199,999	10.0%	15.5%
\$200,000 - \$299,999	6.0%	10.1%
\$300,000 - \$499,999	1.1%	4.0%
\$500,000 - \$999,999	0.8%	1.0%
\$1,000,000 +	0.2%	0.2%
Average Home Value	\$106,226	\$139,230
2000 Specified Renter Occupied Housing Units by Contract Rent		
Total	337	471,466
With Cash Rent	86.9%	96.3%
No Cash Rent	13.1%	3.7%
Median Rent	\$337	\$521
Average Rent	\$372	\$539

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 Housing Units exclude houses on 10+ acres. Average Rent excludes units paying no cash.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.



	Hawley Trade Area	Minnesota (27)
2000 Population by Age		
Total	7,268	4,919,479
0 - 4	5.7%	6.7%
5 - 9	6.9%	7.2%
10 - 14	8.4%	7.6%
15 - 24	11.4%	14.2%
25 - 34	10.0%	13.7%
35 - 44	15.7%	16.8%
45 - 54	14.8%	13.5%
55 - 64	10.6%	8.2%
65 - 74	8.6%	6.0%
75 - 84	5.6%	4.3%
85 +	2.4%	1.7%
18 +	73.8%	73.8%
2010 Population by Age		
Total	7,679	5,334,772
0 - 4	5.7%	6.8%
5 - 9	6.1%	6.7%
10 - 14	6.3%	6.7%
15 - 24	11.7%	13.8%
25 - 34	10.2%	13.3%
35 - 44	11.5%	13.8%
45 - 54	16.2%	15.1%
55 - 64	14.9%	11.4%
65 - 74	9.0%	6.3%
75 - 84	5.7%	4.0%
85 +	2.9%	2.1%
18 +	77.8%	75.7%
2015 Population by Age		
Total	7,934	5,461,840
0 - 4	5.5%	6.7%
5 - 9	5.9%	6.7%
10 - 14	6.5%	6.9%
15 - 24	10.7%	13.1%
25 - 34	11.6%	13.6%
35 - 44	10.0%	13.2%
45 - 54	13.9%	13.6%
55 - 64	16.3%	12.3%
65 - 74	11.1%	7.7%
75 - 84	5.6%	3.9%
85 +	2.9%	2.1%
18 +	78.3%	75.8%
2000 Population by Sex		
Males	51.7%	49.5%
Females	48.3%	50.5%
2010 Population by Sex		
Males	51.1%	49.6%
Females	48.9%	50.4%
2015 Population by Sex		
Males	50.9%	49.6%
Females	49.1%	50.4%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

	Hawley Trade Area	Minnesota (27)
2000 Population by Race/Ethnicity		
Total	7,266	4,919,479
White Alone	98.7%	89.4%
Black Alone	0.1%	3.5%
American Indian Alone	0.4%	1.1%
Asian or Pacific Islander Alone	0.2%	2.9%
Some Other Race Alone	0.1%	1.3%
Two or More Races	0.5%	1.7%
Hispanic Origin	0.6%	2.9%
Diversity Index	3.8	24.3
2010 Population by Race/Ethnicity		
Total	7,680	5,334,772
White Alone	98.2%	86.5%
Black Alone	0.2%	4.5%
American Indian Alone	0.5%	1.2%
Asian or Pacific Islander Alone	0.3%	3.6%
Some Other Race Alone	0.2%	2.0%
Two or More Races	0.7%	2.1%
Hispanic Origin	1.0%	4.5%
Diversity Index	5.3	31.2
2015 Population by Race/Ethnicity		
Total	7,933	5,461,840
White Alone	98.1%	85.3%
Black Alone	0.2%	5.0%
American Indian Alone	0.5%	1.3%
Asian or Pacific Islander Alone	0.3%	3.9%
Some Other Race Alone	0.2%	2.2%
Two or More Races	0.8%	2.4%
Hispanic Origin	1.1%	5.2%
Diversity Index	6.0	34.1
2000 Population 3+ by School Enrollment		
Total	7,024	4,725,959
Enrolled in Nursery/Preschool	1.3%	1.9%
Enrolled in Kindergarten	1.8%	1.5%
Enrolled in Grade 1-8	12.8%	12.6%
Enrolled in Grade 9-12	7.3%	6.5%
Enrolled in College	2.0%	5.2%
Enrolled in Grad/Prof School	0.3%	1.1%
Not Enrolled in School	74.5%	71.2%
2010 Population 25+ by Educational Attainment		
Total	5,397	3,521,425
Less Than 9th Grade	5.4%	3.5%
9th to 12th Grade, No Diploma	5.3%	4.9%
High School Graduate	33.3%	27.4%
Some College, No Degree	21.0%	21.9%
Associate Degree	12.0%	10.4%
Bachelor's Degree	17.7%	21.6%
Graduate/Professional Degree	5.3%	10.2%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

	Hawley Trade Area	Minnesota (27)
2010 Population 15+ by Marital Status		
Total	6,296	4,256,886
Never Married	23.6%	30.1%
Married	61.6%	54.7%
Widowed	6.7%	5.3%
Divorced	8.2%	9.9%
2000 Population 16+ by Employment Status		
Total	5,579	3,781,756
In Labor Force	64.7%	71.2%
Civilian Employed	61.4%	68.2%
Civilian Unemployed	3.3%	2.9%
In Armed Forces	0.1%	0.1%
Not In Labor Force	35.3%	28.8%
2010 Civilian Population 16+ in Labor Force		
Civilian Employed	93.9%	92.2%
Civilian Unemployed	6.1%	7.8%
2015 Civilian Population 16+ in Labor Force		
Civilian Employed	95.1%	93.8%
Civilian Unemployed	4.9%	6.2%
2000 Females 16+ by Employment Status and Age of Children		
Total	2,737	1,931,097
Own Children < 6 Only	6.2%	7.6%
Employed/in Armed Forces	4.2%	5.4%
Unemployed	0.3%	0.2%
Not in Labor Force	1.7%	2.0%
Own Children <6 and 6-17 Only	6.5%	6.3%
Employed/in Armed Forces	4.7%	4.3%
Unemployed	0.0%	0.2%
Not in Labor Force	1.8%	1.9%
Own Children 6-17 Only	19.7%	17.9%
Employed/in Armed Forces	16.8%	14.8%
Unemployed	0.2%	0.3%
Not in Labor Force	2.7%	2.7%
No Own Children < 18	67.6%	68.2%
Employed/in Armed Forces	32.7%	39.2%
Unemployed	1.1%	1.6%
Not in Labor Force	33.7%	27.4%
2010 Employed Population 16+ by Industry		
Total	3,967	2,677,088
Agriculture/Mining	7.2%	2.1%
Construction	6.4%	4.7%
Manufacturing	8.1%	12.5%
Wholesale Trade	5.3%	3.6%
Retail Trade	10.4%	10.8%
Transportation/Utilities	5.2%	4.7%
Information	1.6%	2.1%
Finance/Insurance/Real Estate	7.7%	8.1%
Services	45.0%	48.1%
Public Administration	3.2%	3.2%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

	Hawley Trade Area	Minnesota (27)
2010 Employed Population 16+ by Occupation		
Total	3,968	2,677,088
White Collar	57.9%	64.0%
Management/Business/Financial	15.3%	15.7%
Professional	20.6%	23.9%
Sales	10.0%	11.1%
Administrative Support	12.0%	13.3%
Services	17.1%	16.3%
Blue Collar	25.0%	19.7%
Farming/Forestry/Fishing	1.7%	0.7%
Construction/Extraction	5.4%	3.8%
Installation/Maintenance/Repair	5.5%	3.3%
Production	5.2%	6.6%
Transportation/Material Moving	7.1%	5.4%
2000 Workers 16+ by Means of Transportation to Work		
Total	3,368	2,541,611
Drove Alone - Car, Truck, or Van	75.5%	77.6%
Carpooled - Car, Truck, or Van	14.0%	10.4%
Public Transportation	0.4%	3.2%
Walked	2.0%	3.3%
Other Means	0.4%	0.9%
Worked at Home	7.7%	4.6%
2000 Workers 16+ by Travel Time to Work		
Total	3,367	2,541,611
Did not Work at Home	92.3%	95.4%
Less than 5 minutes	6.7%	4.4%
5 to 9 minutes	9.7%	13.3%
10 to 19 minutes	14.3%	31.0%
20 to 24 minutes	10.3%	14.4%
25 to 34 minutes	20.7%	17.3%
35 to 44 minutes	12.6%	5.4%
45 to 59 minutes	13.7%	5.3%
60 to 89 minutes	3.0%	2.7%
90 or more minutes	1.4%	1.5%
Worked at Home	7.7%	4.6%
Average Travel Time to Work (in min)	27.6	21.9
2000 Households by Vehicles Available		
Total	2,762	1,895,127
None	3.8%	7.7%
1	22.8%	31.2%
2	44.1%	42.2%
3	19.9%	13.7%
4	6.1%	3.8%
5+	3.3%	1.5%
Average Number of Vehicles Available	2.1	1.8

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.



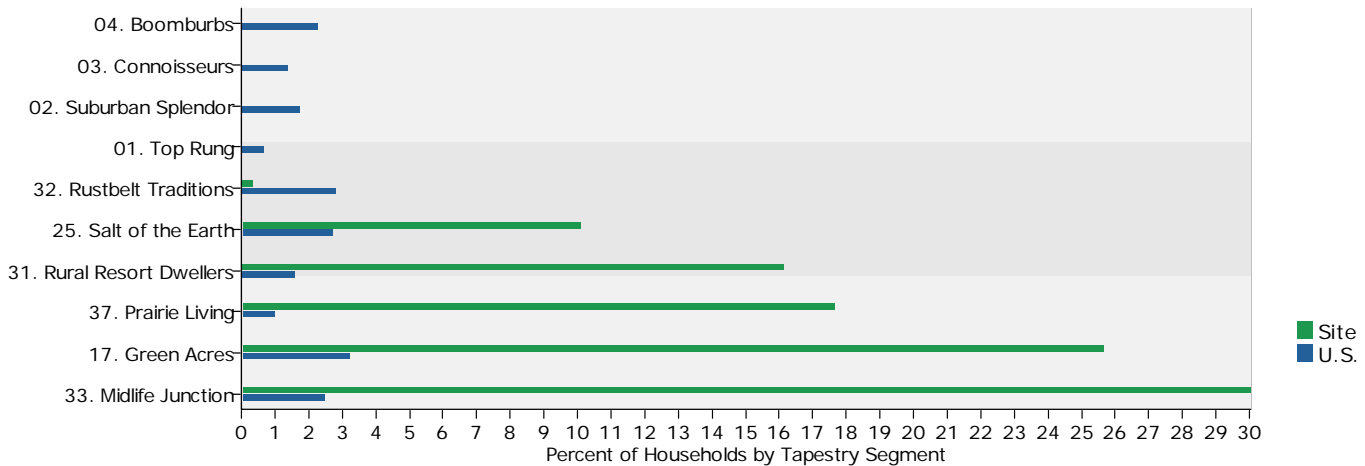
Hawley Trade Area

Top Twenty Tapestry

(Tapestry descriptions can be found at: <http://www.esri.com/library/whitepapers/pdfs/community->

Rank	Tapestry Segment	Households		U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	33. Midlife Junction	30.0%	30.0%	2.5%	2.5%	1215
2	17. Green Acres	25.7%	55.7%	3.2%	5.7%	797
3	37. Prairie Living	17.7%	73.4%	1.0%	6.7%	1776
4	31. Rural Resort Dwellers	16.2%	89.5%	1.6%	8.3%	998
5	25. Salt of the Earth	10.1%	99.6%	2.7%	11.0%	369
Subtotal		99.6%		11.0%		
6	32. Rustbelt Traditions	0.4%	100.0%	2.8%	13.9%	13
7	01. Top Rung	0.0%	100.0%	0.7%	14.5%	0
8	02. Suburban Splendor	0.0%	100.0%	1.7%	16.3%	0
9	03. Connoisseurs	0.0%	100.0%	1.4%	17.7%	0
10	04. Boomburbs	0.0%	100.0%	2.3%	20.0%	0
Subtotal		0.4%		8.9%		
11	05. Wealthy Seaboard Suburbs	0.0%	100.0%	1.4%	21.3%	0
12	06. Sophisticated Squires	0.0%	100.0%	2.7%	24.1%	0
13	07. Exurbanites	0.0%	100.0%	2.5%	26.6%	0
14	08. Laptops and Lattes	0.0%	100.0%	1.0%	27.6%	0
15	09. Urban Chic	0.0%	100.0%	1.3%	28.9%	0
Subtotal		0.0%		9.0%		
16	10. Pleasant-Ville	0.0%	100.0%	1.7%	30.6%	0
17	11. Pacific Heights	0.0%	100.0%	0.6%	31.3%	0
18	12. Up and Coming Families	0.0%	100.0%	3.5%	34.8%	0
19	13. In Style	0.0%	100.0%	2.5%	37.2%	0
20	14. Prosperous Empty Nesters	0.0%	100.0%	1.8%	39.1%	0
Subtotal		0.0%		10.1%		
Total		100.0%		39.1%		256

Top Ten Tapestry Segments Site vs. U.S.



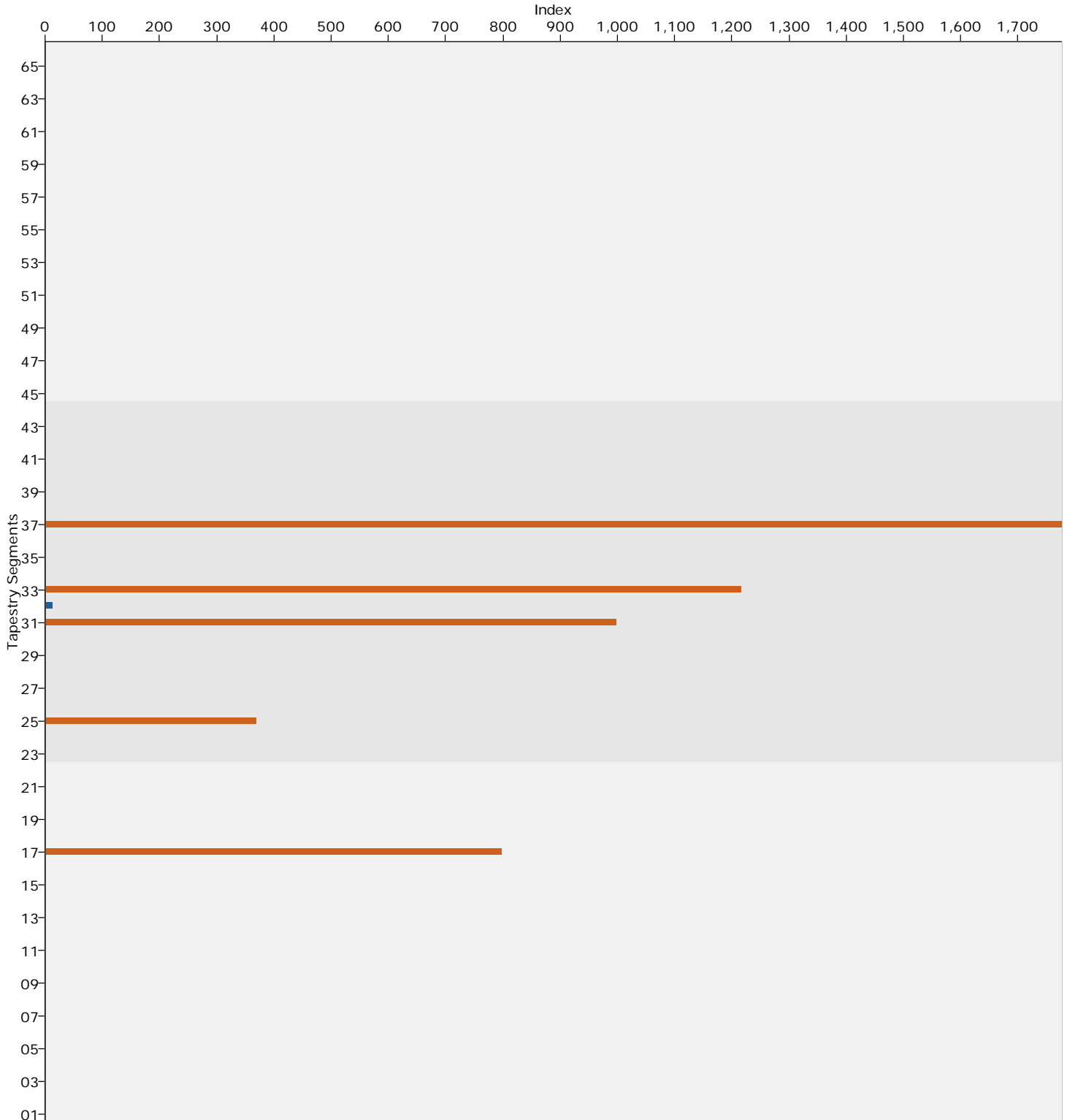
Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States,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

Source: Esri



Hawley Trade Area

Tapestry Indexes by Households



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.

Source: Esri



Hawley Trade Area

Tapestry LifeMode Groups	2010 Households		Index
	Number	Percent	
Total:	3,030	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	778	25.7%	185
09 Urban Chic	0	0.0%	0
10 Pleasant-Ville	0	0.0%	0
11 Pacific Heights	0	0.0%	0
13 In Style	0	0.0%	0
16 Enterprising Professionals	0	0.0%	0
17 Green Acres	778	25.7%	797
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	0	0.0%	0
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	0	0.0%	0
57 Simple Living	0	0.0%	0
65 Social Security Set	0	0.0%	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

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.

Source: Esri

Tapestry Segmentation Area Profile

Prepared By Business Analyst Desktop

Hawley Trade Area

Tapestry LifeMode Groups	2010 Households		Index
	Number	Percent	
Total:	3,030	100.0%	
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	921	30.4%	349
24 Main Street, USA	0	0.0%	0
32 Rustbelt Traditions	11	0.4%	13
33 Midlife Junction	910	30.0%	1216
34 Family Foundations	0	0.0%	0
L11. Factories & Farms	841	27.8%	296
25 Salt of the Earth	306	10.1%	369
37 Prairie Living	535	17.7%	1776
42 Southern Satellites	0	0.0%	0
53 Home Town	0	0.0%	0
56 Rural Bypasses	0	0.0%	0
L12. American Quilt	490	16.2%	173
26 Midland Crowd	0	0.0%	0
31 Rural Resort Dwellers	490	16.2%	998
41 Crossroads	0	0.0%	0
46 Rooted Rural	0	0.0%	0
66 Unclassified	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or 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.

Source: Esri

33 Midlife Junction

Demographic

The median age for residents in these neighborhoods is 41.8 years; nearly 20 percent are aged 65 years or older. Households are a mix of family types and singles who live alone or share housing. Nearly half are married-couple families; 31 percent are singles. Most of these residents are white.

Socioeconomic

Most are still working; although at 61 percent, the labor force participation rate is slightly below average. A third of the households receive Social Security. The median household income of \$48,161 is slightly below the US median; the median net worth is \$80,220. Educational attainment levels are comparable to the US levels.

Residential

Although scattered in suburbs across the country, these neighborhoods are found more frequently in the South and Midwest. Sixty-five percent of residents own their homes, close to the US rate. Nearly two-thirds of the housing is single family; the remainder are primarily apartments in multiunit buildings. The median home value of \$131,464 is lower than the US median of \$157,913.

Preferences

Midlife Junction residents live quiet, settled lives as they move from child-rearing into retirement. To finance their retirement, they own certificates of deposit, savings bonds, and IRAs. They're careful spenders, always looking for bargains, and not swayed by fads.

On weekends, they eat fast food or go to family restaurants such as Friendly's or Perkins. They drive standard-sized domestic cars and shop by mail or phone from the L.L. Bean and JCPenney catalogs. They communicate with friends and family by e-mail. They go fishing, take walks, work crossword puzzles, play board games, do woodworking, and read science fiction or romance novels. They watch TV network shows and news programs.

17 Green Acres

Demographic

Seventy-one percent of the households in *Green Acres* neighborhoods are married couples with and without children. Many families are blue-collar Baby Boomers, many with children aged 6–17 years. With more than 10 million people, *Green Acres* represents Tapestry Segmentation's third largest segment, currently more than 3 percent of the US population and growing by 1.92 percent annually. The median age is 41 years. This segment is not ethnically diverse; 92 percent of the residents are white.

Socioeconomic

Educated and hard-working, more than one-fourth of *Green Acres* residents hold a bachelor's or graduate degree; more than half have attended college. Labor force participation is 67.5 percent, with higher employment concentrations in the manufacturing, construction, health care, and retail trade industry sectors. Occupation distributions are similar to those of the United States. Seventeen percent of the households earn income from self-employment ventures. The median household income is \$63,430; the median net worth is \$174,417.

Residential

Although *Green Acres* neighborhoods are located throughout the country, they are found primarily in the Midwest and South, with the highest concentrations in Michigan, Ohio, and Pennsylvania. A "little bit country," these residents live in pastoral settings of developing suburban fringe areas. Home ownership is at 86 percent, and median home value is \$179,073. Typical of rural residents, *Green Acres* households own multiple vehicles; 78 percent own two or more vehicles.

Preferences

Country living describes the lifestyle of *Green Acres* residents. Pet dogs or cats are considered part of the family. These do-it-yourselfers maintain and remodel their homes; projects include roofing and installing carpet or insulation. They own all the necessary power tools, including routers, welders, sanders, and various saws, to finish their projects. Residents also have the right tools to maintain their lawns, flower gardens, and vegetable gardens. They own riding lawn mowers, garden tillers, tractors, and even separate home freezers for the harvest. Continuing the do-it-yourself mode, it is not surprising that *Green Acres* is the top market for owning a sewing machine. A favorite pastime is using their ice cream maker to produce homemade ice cream. They prefer motorcycles and full-size pickup trucks.

For exercise, *Green Acres* residents ride their mountain bikes and go fishing, canoeing, and kayaking. They also ride horseback and go power boating, bird watching, target shooting, hunting, motorcycling, and bowling. They listen to auto racing and country music on the radio and read fishing and hunting magazines. Many own satellite dishes so they can watch news programs, the Speed Channel, and auto racing on TV. A favorite channel is Country Music Television.

37 Prairie Living

Demographic

Small, family-owned farms in the Midwest dominate this stable market. Two-thirds of these households are composed of married couples with or without children. These residents are slightly older, with a median age of 41.6 years. There is little diversity here; 9 in 10 of these residents are white.

Socioeconomic

More than 67 percent of the residents are in the labor force; the unemployment rate is low. One in four residents who work are self-employed. Even though agricultural jobs are important to the local economy, 40 percent of the residents work in white-collar jobs. Thirty-one percent of the households receive Social Security benefits; 43 percent collect income from their investments. The median household income is \$42,830; the median net worth is \$79,313. Eighty-four percent of the residents aged 25 years and older have graduated from high school; the number of those who hold a bachelor's or graduate degree is below the US level.

Residential

Most of these Midwestern neighborhoods are centered in Iowa, Nebraska, Minnesota, and Kansas. Smaller groups are concentrated in the West and South. Seventy-nine percent own their homes; the median home value is \$103,090. Most housing is single-family; however, 11 percent are mobile homes, slightly higher than the US average. Thirty-six percent of the housing was built before 1940. Multiple vehicles are necessary to cover these rural areas. Approximately three-quarters of the households own 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 can with pressure cookers and fill their separate freezers with produce from their vegetable gardens. They own riding mowers, gardening equipment, and tools to service their vehicles and make home repairs. They will tackle home improvement projects such as kitchen remodeling. They're pet owners.

Many own satellite dishes because cable TV is not available in many rural neighborhoods. *Prairie Living* residents are loyal country music fans and tune in to radio and television for their favorite music. They enjoy hunting, fishing, horseback riding, target shooting, and riding around on their all-terrain vehicles. They tend to be political conservatives. They prefer domestic vehicles, especially trucks. Civic-minded *Prairie Living* residents serve on church boards, speak at public meetings, volunteer for charitable organizations, and help with fund-raising. *Prairie Living* households shop for bargains. Wal-Mart is, by far, their favorite retailer, followed by Kmart and JCPenney. They often rely on a Wal-Mart Supercenter for extra grocery shopping.

Media and Internet Marketing Profile

Based on the mix of customer demographics and lifestyles in your trade area, we have knowledge of their media and internet habits from national marketing data. Below are some highlights of this information, although full information is compiled in the following pages.

	Number of adults	Percent of adults
<i>Newspaper Readership</i>		
Light newspaper reader	1251	21%
Light-medium newspaper reader	1163	19%
Medium newspaper reader	1150	19%
Medium-heavy newspaper reader	1414	24%
Heavy newspaper reader	1230	21%
Read any daily newspaper	2865	48%
Read one daily newspaper	2324	39%
Read two or more daily newspapers	543	9%
Read any Sunday newspaper	3280	55%
<i>Radio Listenership</i>		
Light radio listener	1372	23%
Light-medium radio listener	1206	20%
Medium radio listener	1159	19%
Medium-heavy radio listener	1184	20%
Heavy radio listener	1290	22%
<i>Internet Habits</i>		
Have Access to Internet	5217	87%
Used Internet in last month	4130	69%
Used email in past month	3532	59%
Made purchase online, personal	1648	28%
Made purchase online,business	536	9%
Made travel plans in past month	868	15%
Obtained latest news in past month	1903	32%

Source: These data area 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.

Market Potential: Internet

Hawley Trade Area

Total 2008 Adults: 5,979

Product/Consumer Behavior:	Expected Number of Adults	Expected Percent of Adults	Expected Percent in MN
Internet Access:			
Have Access to Internet	5217	87.3%	86.5%
Have access to Internet,at home	4088	68.4%	71.9%
Have access to Internet,at work	2276	38.1%	41.9%
Have access to Internet,at schl/library	1541	25.8%	26.5%
Used Internet/mo,not hm/wrk/schl/lib	1244	20.8%	20.3%
Use Internet less than once/wk	348	5.8%	3.9%
Use Internet 1-2 times per week	401	6.7%	5.8%
Use Internet 3-6 times per week	535	8.9%	8.6%
Use Internet daily	708	11.8%	11.3%
Use Internet 2-4 times per day	1051	17.6%	18.6%
Use Internet 5 or more times/day	1088	18.2%	24.4%
Used Internet in last month,any	4130	69.1%	72.5%
Used Internet/mo,at home	3525	59.0%	63.7%
Used Internet/mo,at work	1838	30.7%	35.8%
Used Internet/mo,at school/library	315	5.3%	7.4%
Used Internet/mo,not hm/wrk/schl/lib	522	8.7%	9.0%
Internet Activities in past month:			
Used email	3532	59.1%	64.5%
Used Instant Messenger	1163	19.5%	24.9%
Paid bills online	1381	23.1%	31.6%
Visited online blog	311	5.2%	8.3%
Wrote online blog	112	1.9%	3.3%
Visited chat room	187	3.1%	4.1%
Looked for employment	550	9.2%	11.0%
Played games online	1015	17.0%	19.1%
Made trade or tracked investments	488	8.2%	11.0%
Downloaded music	731	12.2%	16.4%
Made phone call	96	1.6%	2.7%
Made purchase, personal	1648	27.6%	32.0%
Made purchase,business	536	9.0%	10.0%
Made travel plans	868	14.5%	18.3%
Watched online video	654	10.9%	15.0%

Source: These data area 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.



Market Potential: Internet

Hawley Trade Area

Total 2008 Adults: 5,979

Product/Consumer Behavior:	<i>Expected Number of Adults</i>	<i>Expected Percent of Adults</i>	<i>Expected Percent in MN</i>
Information obtained online in past month:			
New/used car info	523	8.7%	9.6%
Financial info	1108	18.5%	24.2%
Obtained medical info	921	15.4%	16.6%
Obtained latest news	1903	31.8%	38.4%
Obtained real estate info	520	8.7%	11.3%
Obtained sports news/info	1056	17.7%	23.0%
Ordered on Internet in last year:			
Anything	2057	34.4%	37.2%
airline ticket	829	13.9%	17.9%
CD/tape	239	4.0%	5.1%
clothing	793	13.3%	14.7%
computer	180	3.0%	3.6%
computer accessories	214	3.6%	4.4%
DVD	358	6.0%	7.1%
flowers	162	2.7%	4.7%
software	326	5.5%	6.0%
tickets	392	6.6%	9.3%
toy	262	4.4%	4.9%
E-commerce purchases in last year			
Purchased item at Amazon.com	681	11.4%	13.4%
Purchased item at barnes&noble.com	170	2.8%	3.4%
Purchased item at bestbuy.com	120	2.0%	2.5%
Purchased item at ebay.com	543	9.1%	9.7%
Purchased item at walmart.com	247	4.1%	3.5%
Spent <\$200 online	711	11.9%	11.4%
Spent \$200-499 online	502	8.4%	8.7%
Spent \$500+	749	12.5%	15.3%

Source: These data area 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.



Market Potential: Media Read

Hawley Trade Area

Total 2008 Adults: 5,979

Product/Consumer Behavior:	Expected Number of Adults	Expected Percent of Adults	Expected Percent in MN
Newspaper readership:			
Light newspaper reader	1251	20.9%	18.6%
Light-medium newspaper reader	1163	19.5%	19.5%
Medium newspaper reader	1150	19.2%	19.9%
Medium-heavy newspaper reader	1414	23.6%	20.6%
Heavy newspaper reader	1230	20.6%	20.4%
Read any daily newspaper	2865	47.9%	44.5%
Read one daily newspaper	2324	38.9%	36.0%
Read two or more daily newspapers	543	9.1%	8.6%
Read any Sunday newspaper	3280	54.9%	54.0%
Newspaper content:			
Read newspaper: advertisements	1268	21.2%	21.7%
Read newspaper: business/finance section	1522	25.5%	26.4%
Read newspaper: circulars/inserts/fliers	1011	16.9%	16.8%
Read newspaper: classified section	2158	36.1%	27.8%
Read newspaper: comics	1797	30.1%	25.7%
Read newspaper: editorial page	1861	31.1%	25.0%
Read newspaper: entertainment/lifestyle section	1740	29.1%	29.6%
Read newspaper: fashion section	708	11.8%	12.4%
Read newspaper: food/cooking section	1625	27.2%	24.5%
Read newspaper: main news/front page	3970	66.4%	60.6%
Read newspaper: health section	999	16.7%	17.7%
Read newspaper: home/furnishings/gardening section	1113	18.6%	17.0%
Read newspaper: international/national news	1121	18.7%	17.8%
Read newspaper: local news section	3846	64.3%	57.3%
Read newspaper: movie listings/reviews section	1268	21.2%	21.7%
Read newspaper: science & technology section	1011	16.9%	16.8%
Read newspaper: sports section	2269	37.9%	36.2%
Read newspaper: travel section	999	16.7%	17.7%
Read newspaper: TV listings section	1121	18.7%	17.8%

Source: These data area 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.



Market Potential: Media Read

Hawley Trade Area

Total 2008 Adults: 5,979

Product/Consumer Behavior:	<i>Expected Number of Adults</i>	<i>Expected Percent of Adults</i>	<i>Expected Percent in MN</i>
Magazine readership:			
Light magazine reader	1267	21.2%	17.9%
Light-medium magazine reader	1497	25.0%	20.6%
Medium magazine reader	1327	22.2%	20.5%
Medium-heavy magazine reader	1186	19.8%	20.2%
Heavy magazine reader	936	15.7%	19.8%
Magazine format:			
Read airline magazines	221	3.7%	6.2%
Read automotive magazines	774	12.9%	12.3%
Read baby magazines	242	4.0%	4.1%
Read boating magazines	120	2.0%	2.2%
Read bridal magazines	244	4.1%	4.2%
Read business/finance magazines	905	15.1%	18.7%
Read computer magazines	168	2.8%	4.2%
Read Epicurean magazines	435	7.3%	8.7%
Read fishing/hunting magazines	1171	19.6%	12.9%
Read general editorial magazines	2538	42.4%	42.1%
Read health magazines	869	14.5%	15.3%
Read home service magazines	2250	37.6%	34.6%
Read motorcycle magazines	196	3.3%	3.4%
Read music magazines	824	13.8%	9.5%
Read news and entertainment weekly	2132	35.7%	41.3%
Read parenthood magazines	682	11.4%	12.2%
Read science/technology magazines	318	5.3%	6.3%
Read sports magazines	756	12.6%	16.0%
Read travel magazines	421	7.0%	8.8%
Read women's fashion magazines	255	4.3%	6.0%

Source: These data area 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.



Market Potential: Media Listen

Hawley Trade Area

Total 2008 Adults: 5,979

Product/Consumer Behavior:	Expected Number of Adults	Expected Percent of Adults	Expected Percent in MN
Radio access:			
Light radio listener	1372	22.9%	19.1%
Light-medium radio listener	1206	20.2%	20.1%
Medium radio listener	1159	19.4%	20.6%
Medium-heavy radio listener	1184	19.8%	19.8%
Heavy radio listener	1290	21.6%	19.6%
Radio format listened to:			
adult contemporary	1032	17.3%	19.2%
all news	73	1.2%	4.2%
all talk	140	2.3%	3.9%
alternative	359	6.0%	8.2%
classic hits	320	5.4%	4.9%
classic rock	752	12.6%	11.1%
classical	157	2.6%	3.2%
contemporary hit radio	851	14.2%	16.8%
country	2284	38.2%	24.6%
gospel	147	2.5%	2.3%
Hispanic	88	1.5%	3.7%
jazz	120	2.0%	3.9%
news/talk	833	13.9%	13.2%
oldies	513	8.6%	8.4%
public	222	3.7%	3.9%
religious	402	6.7%	6.8%
rock	627	10.5%	11.8%
soft adult contemporary	239	4.0%	5.2%
sports	170	2.8%	5.1%
urban	341	5.7%	11.1%
variety/other	443	7.4%	9.5%

Source: These data area 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.



Market Potential: Media Listen

Hawley Trade Area

Total 2008 Adults: 5,979

Product/Consumer Behavior:	<i>Expected Number of Adults</i>	<i>Expected Percent of Adults</i>	<i>Expected Percent in MN</i>
Radio programming listed to:			
auto racing	515	8.6%	7.0%
baseball playoffs/World Series	639	10.7%	11.5%
basketball (college)	402	6.7%	7.2%
basketball (pro)	308	5.2%	6.4%
football (college)	738	12.3%	12.3%
football-Monday night (pro)	459	7.7%	8.4%
football-weekend (pro)	741	12.4%	12.9%
golf	176	2.9%	2.9%
ice hockey	194	3.2%	3.7%
NFL playoffs/Superbowl	460	7.7%	0.0%
Listen to radio:			
6:00 am - 10:00 am weekday	3219	53.8%	53.2%
10:00 am - 3:00 pm weekday	2376	39.7%	37.4%
3:00 pm - 7:00 pm weekday	2728	45.6%	46.1%
7:00 pm - midnight weekday	864	14.5%	15.5%
midnight - 6:00 am weekday	308	5.2%	5.3%
6:00 am - 10:00 am weekend	1999	33.4%	31.7%
10:00 am - 3:00 pm weekend	2504	41.9%	42.9%
3:00 pm - 7:00 pm weekend	1887	31.6%	33.2%
7:00 pm - midnight weekend	921	15.4%	16.3%
midnight - 6:00 am weekend	287	4.8%	4.5%

Source: These data area 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.

Recommendations: Business Opportunities

Based on the retail gap analysis alone these are the top store formats which may be good opportunities for business start up or expansion in the Hawley trade area:

- Child day care
- Finishing contractors
- Residential building construction
- Personal goods repair (watch, boat, garment)
- Limited-service eating places
- Special foods (caterers, etc.)
- Beauty salons
- All other miscellaneous store retailers
- Cosmetics, beauty supplies, perfume stores
- Nail salons
- Furniture stores
- Hardware stores
- General merchandise stores

Introduction:

In late April, 2011 a retail study group consisting of the Hawley EDA 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. Hotel or motel
2. Hardware
3. Clothing
4. Dance/Events Center

*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: Hawley Trade Area

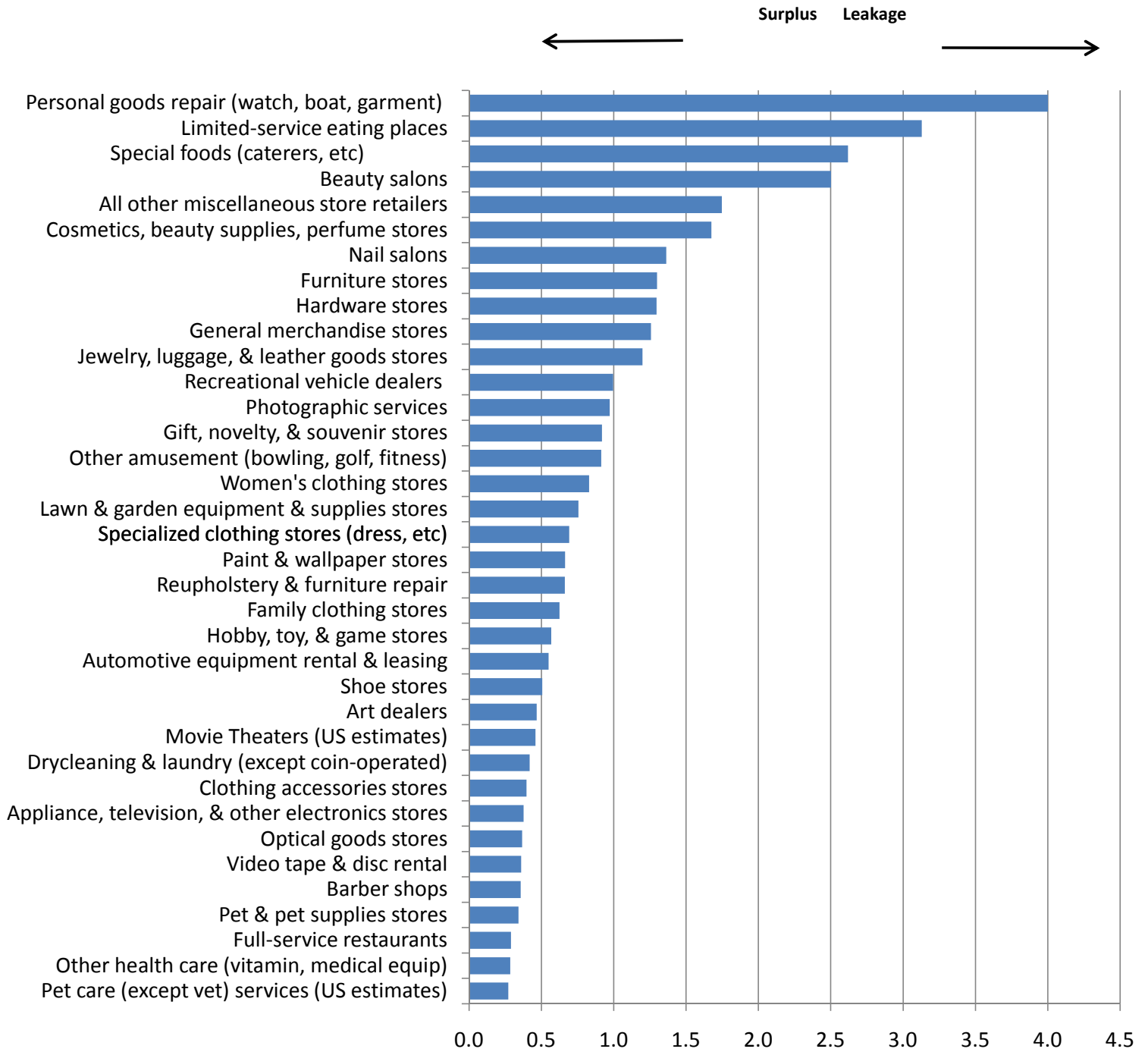
This report estimates the potential number of businesses across store categories based on the spending of the area residents (demand) compared to the number of stores in the trade area (supply). Those categories where demand is greater than supply are opportunities for businesses development. Demand estimates are calculated from US Economic Census data and supply listings are from a national database of businesses, revised by local community members for accuracy (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)
81149	Personal goods repair (watch, boat, garment)	\$ 28	\$ 31,974	\$ 159,886	5.0	1	4.0
7222	Limited-service eating places	\$ 544	\$ 606,011	\$ 3,107,926	5.1	2	3.1
7223	Special foods (caterers, mobile food)	\$ 162	\$ 353,894	\$ 927,231	2.6	0	2.6
812112	Beauty salons	\$ 124	\$ 74,629	\$ 709,143	9.5	7	2.5
45399	All other miscellaneous store retailers	\$ 62	\$ 128,687	\$ 353,505	2.7	1	1.7
44612	Cosmetics, beauty supplies, perfume stores	\$ 28	\$ 96,585	\$ 161,726	1.7	0	1.7
812113	Nail salons	\$ 10	\$ 40,504	\$ 55,214	1.4	0	1.4
4421	Furniture stores	\$ 205	\$ 1,629,971	\$ 1,170,197	1.3	0	1.3
44413	Hardware stores	\$ 118	\$ 1,013,346	\$ 673,657	1.3	0	1.3
452	General merchandise stores	\$ 2,011	\$ 9,124,699	\$ 11,478,824	1.3	0	1.3
4483	Jewelry, luggage, & leather goods stores	\$ 86	\$ 408,225	\$ 489,639	1.2	0	1.2
44121	Recreational vehicle dealers	\$ 64	\$ 1,753,870	\$ 367,093	1.0	0	1.0
54192	Photographic services	\$ 165	\$ 317,454	\$ 943,670	3.0	2	1.0
45322	Gift, novelty, & souvenir stores	\$ 60	\$ 178,090	\$ 341,655	1.9	1	0.9
7139	Other amusement (bowling, golf, fitness)	\$ 236	\$ 273,998	\$ 1,346,362	4.9	4	0.9
44812	Women's clothing stores	\$ 103	\$ 705,752	\$ 585,510	0.8	0	0.8
4442	Lawn & garden equipment & supplies stores	\$ 250	\$ 1,799,153	\$ 1,424,334	1.8	1	0.8
44819	Specialized clothing stores (dress, etc)	\$ 39	\$ 321,506	\$ 222,449	0.7	0	0.7
44412	Paint & wallpaper stores	\$ 32	\$ 1,024,355	\$ 184,408	0.7	0	0.7
81142	Reupholstery & furniture repair	\$ 6	\$ 50,262	\$ 33,250	0.7	0	0.7
44814	Family clothing stores	\$ 208	\$ 1,898,733	\$ 1,188,121	0.6	0	0.6
45112	Hobby, toy, & game stores	\$ 45	\$ 447,948	\$ 254,554	0.6	0	0.6
5321	Automotive equipment rental & leasing	\$ 161	\$ 1,666,262	\$ 916,162	0.5	0	0.5
44821	Shoe stores	\$ 69	\$ 774,015	\$ 392,001	0.5	0	0.5
45392	Art dealers	\$ 10	\$ 121,938	\$ 57,127	0.5	0	0.5
51213	Movie Theaters (US estimates)	\$ 41	\$ 508,869	\$ 234,034	0.5	0	0.5
81232	Drycleaning & laundry (except coin-operated)	\$ 20	\$ 274,352	\$ 114,846	0.4	0	0.4
44815	Clothing accessories stores	\$ 13	\$ 190,332	\$ 75,753	0.4	0	0.4
44311	Appliance, television, & other electronics stores	\$ 318	\$ 1,662,069	\$ 1,816,898	0.4	0	0.4
44613	Optical goods stores	\$ 33	\$ 507,314	\$ 185,958	0.4	0	0.4
53223	Video tape & disc rental	\$ 24	\$ 383,174	\$ 138,376	0.4	0	0.4
812111	Barber shops	\$ 6	\$ 25,581	\$ 34,705	1.4	1	0.4

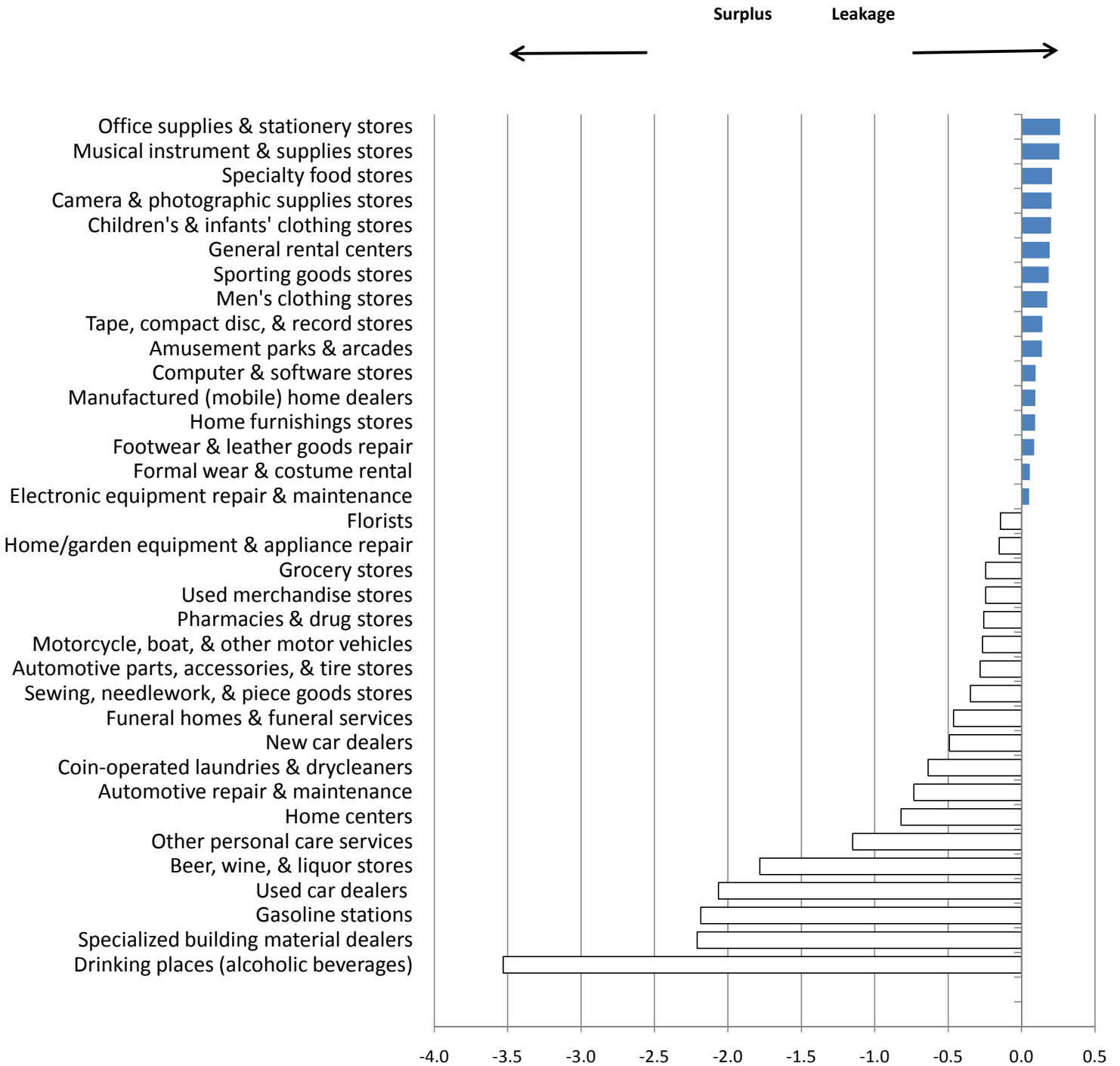
NAICS	Name	MN			No. of Stores (Demand)	No. of Stores (Supply)*	Potential Stores (Demand - Supply)
		Sales Per Capita	Sales per Ave. MN Store	Potential Sales in Trade Area			
45391	Pet & pet supplies stores	\$ 38	\$ 631,763	\$ 216,502	0.3	0	0.3
7221	Full-service restaurants	\$ 612	\$ 814,588	\$ 3,494,743	4.3	4	0.3
44619	Other health care (vitamin, medical equip)	\$ 50	\$ 223,721	\$ 287,505	1.3	1	0.3
81291	Pet care (except vet) services (US estimates)	\$ 9	\$ 40,375	\$ 51,373	1.3	1	0.3
45321	Office supplies & stationery stores	\$ 58	\$ 1,253,050	\$ 328,855	0.3	0	0.3
45114	Musical instrument & supplies stores	\$ 23	\$ 506,975	\$ 130,303	0.3	0	0.3
4452	Specialty food stores	\$ 50	\$ 237,854	\$ 287,096	1.2	1	0.2
44313	Camera & photographic supplies stores	\$ 14	\$ 828,398	\$ 79,057	0.2	0	0.2
44813	Children's & infants' clothing stores	\$ 38	\$ 1,081,575	\$ 218,168	0.2	0	0.2
5323	General rental centers	\$ 13	\$ 376,722	\$ 71,904	0.2	0	0.2
45111	Sporting goods stores	\$ 195	\$ 937,906	\$ 1,110,715	1.2	1	0.2
44811	Men's clothing stores	\$ 21	\$ 674,391	\$ 117,749	0.2	0	0.2
45122	Tape, compact disc, & record stores	\$ 7	\$ 262,359	\$ 37,272	0.1	0	0.1
7131	Amusement parks & arcades	\$ 12	\$ 499,539	\$ 69,343	0.1	0	0.1
44312	Computer & software stores	\$ 63	\$ 950,793	\$ 358,828	0.1	0	0.1
45393	Manufactured (mobile) home dealers	\$ 22	\$ 1,356,103	\$ 127,948	0.1	0	0.1
4422	Home furnishings stores	\$ 170	\$ 745,495	\$ 968,551	1.1	1	0.1
81143	Footwear & leather goods repair	\$ 1	\$ 55,113	\$ 4,781	0.1	0	0.1
53222	Formal wear & costume rental	\$ 4	\$ 421,423	\$ 23,765	0.1	0	0.1
8112	Electronic equipment repair & maintenance	\$ 53	\$ 289,608	\$ 304,337	1.1	1	0.1
4531	Florists	\$ 31	\$ 208,638	\$ 178,521	0.9	1	-0.1
81141	Home/garden equipment & appliance repair	\$ 11	\$ 71,921	\$ 60,993	0.8	1	-0.2
4451	Grocery stores	\$ 1,345	\$ 4,373,159	\$ 7,678,264	1.8	2	-0.2
4533	Used merchandise stores	\$ 36	\$ 118,273	\$ 207,660	1.8	2	-0.2
44611	Pharmacies & drug stores	\$ 551	\$ 4,236,414	\$ 3,142,500	0.7	1	-0.3
44122	Motorcycle, boat, & other motor vehicles	\$ 224	\$ 1,280,371	\$ 1,276,063	1.7	2	-0.3
4413	Automotive parts, accessories, & tire stores	\$ 239	\$ 786,193	\$ 1,363,323	0.7	1	-0.3
45113	Sewing, needlework, & piece goods stores	\$ 24	\$ 214,228	\$ 139,628	0.7	1	-0.3
81221	Funeral homes & funeral services	\$ 46	\$ 493,129	\$ 264,720	0.5	1	-0.5
44111	New car dealers	\$ 1,942	\$21,797,759	\$ 11,086,783	0.5	1	-0.5
81231	Coin-operated laundries & drycleaners	\$ 8	\$ 128,336	\$ 46,764	0.4	1	-0.6
8111	Automotive repair & maintenance	\$ 383	\$ 235,711	\$ 2,184,051	9.3	10	-0.7
44411	Home centers	\$ 460	\$12,891,101	\$ 2,628,262	0.2	1	-0.8
81219	Other personal care services	\$ 25	\$ 50,062	\$ 142,676	2.9	4	-1.1
4453	Beer, wine, & liquor stores	\$ 225	\$ 1,053,080	\$ 1,282,514	1.2	3	-1.8
44112	Used car dealers	\$ 201	\$ 593,182	\$ 1,148,278	1.9	4	-2.1
4471	Gasoline stations	\$ 1,877	\$ 3,805,352	\$ 10,713,230	2.8	5	-2.2
44419	Specialized building material dealers	\$ 414	\$ 1,821,410	\$ 2,360,459	0.8	3	-2.2
7224	Drinking places (alcoholic beverages)	\$ 85	\$ 330,782	\$ 486,433	1.5	5	-3.5

* 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.

Retail Gap Estimates by Store Format



Retail Gap Estimates by Store Format



Retail Gap Analysis Supplement on Trades/Others: Hawley

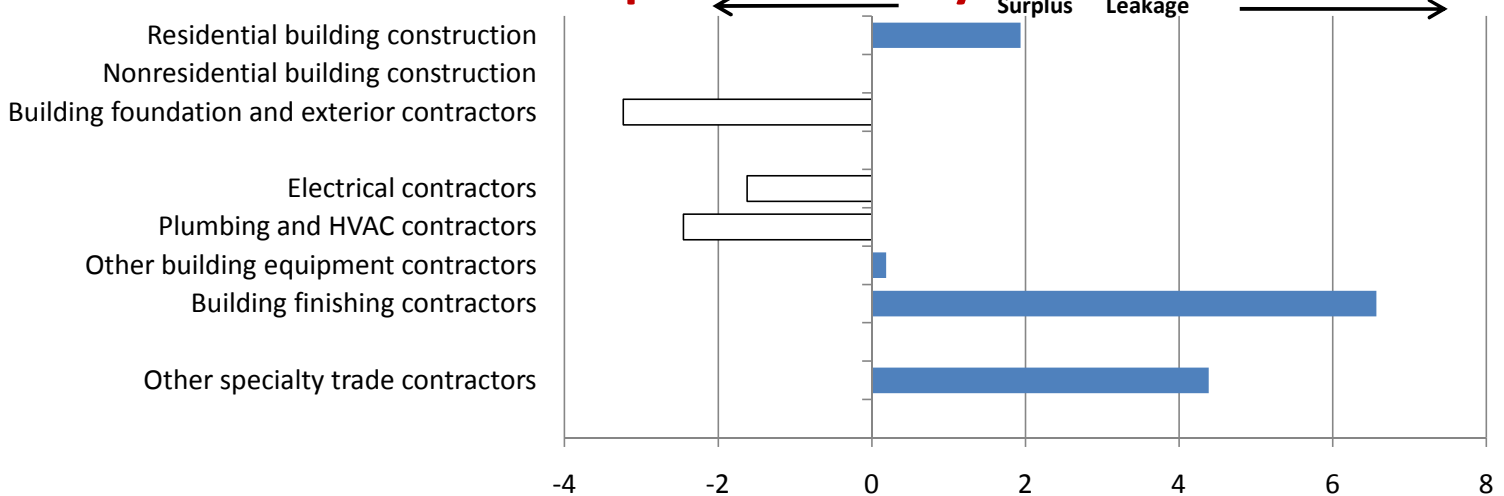
This report estimates the potential number of businesses across store categories based on the spending of the area residents (demand) compared to the number of stores in the trade area (supply). Those categories where demand is greater than supply are opportunities for business development. Demand estimates are calculated from US Economic Census data and supply listings are from a national database of businesses, revised by local community members for accuracy (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							
2361	Residential building construction	\$ 1,242	\$ 419,441	\$ 3,201,874	7.6	2	5.6
2381	Building foundation and exterior contractors <i>Framing, Siding, Glass, Masonry</i>	\$ 667	\$ 381,066	\$ 1,719,686	4.5	2	2.5
23821	Electrical contractors	\$ 545	\$ 943,884	\$ 1,405,796	1.7	4	-2.3
23822	Plumbing and HVAC contractors	\$ 686	\$ 1,030,667	\$ 1,768,531	0.2	1	-0.8
23829	Other building equipment contractors <i>Boilers, Garage Doors, Ducts, Specialized Install</i>	\$ 144	\$ 1,580,648	\$ 370,637	0.0	0	0.0
2383	Finishing contractors <i>Drywall, Painting, Flooring, Tile, Finishing Carpentry</i>	\$ 542	\$ 160,714	\$ 1,398,093	8.7	4	4.7
2389	Other specialty trade contractors <i>Site preparation, Septics, Turf, Asphaltting, Fence</i>	\$ 485	\$ 209,377	\$ 1,249,861	6.0	6	0.0
6244	Child day care services	\$ 163	\$ 39,336	\$ 419,968	10.7	3	7.7
52421	Insurance agencies and brokerages	\$ 495	\$ 287,489	\$ 1,275,540	4.4	5	-0.6
54121	Accounting, tax preparation, bookkeeping, and pay	\$ 402	\$ 271,228	\$ 1,037,658	3.8	4	-0.2
7211	Traveler accommodation	\$ 600	\$ 1,601,508	\$ 1,548,261	1.0	3	-2.0

* 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)

Retail Gap Estimates by Store Format



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 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 2007 US Economic Census data. 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 like tax 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.