

## At A Glance:



# Hill City Market Area Profile, June 2009

Results based on an analysis from multiple datasources, compiled using Business Analyst from ESRI ([www.esri.com](http://www.esri.com)) and informed by a local retail study group.

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

### *How large is the local retail market ?*

1,715 people living in 703 households, whose retail goods and services purchases account for \$16.5 Million.

The *seasonal* retail market includes another 259 households whose potential purchases in the area are estimated at \$4.5 Million.



### *What do we know about households in the Hill City trade area?*

Median Household Income	\$39,934	Median Net Worth	\$54,617
Median Disposable Income	\$31,254	Median Age	46.6
Households with related children	28.6%	Households with persons 65+	30.9%

### *What do we know about housing in the Hill City trade area ?*

Seasonal Housing Units	500 or 45% of total	Renter Occupied Units	70 or 6.4% of total
Median home value	\$120,513		

### *What types of customers live in the Hill City trade area ?*

	<i>Rural Resort Dwellers</i>	<i>Heartland Communities</i>	<i>Rooted Rural</i>
Number of HH	336	187	180
Percent of Households	47.8%	26.6%	25.6%
<b><u>Demographics</u></b>			
Median Age	47.1 years	42.0 years	42.2 years
Median Household Income	\$47,908	\$35,544	\$38,050
Median Home Value	\$209,920	\$82,080	\$101,198

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# Hill City 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: June, 2009 by Ryan Pesch and John Bennett, Extension Educators, University of Minnesota Extension.

Sponsor: Aitkin County

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	<b>Hill City</b>	<b>Minnesota</b>
2008 Total Population	1,715	5,357,700
2013 Total Population	1,784	5,636,868
2008-2013 Annual Rate	1.00%	1.00%
2008 Households	703	2,099,737
2008 Average Household Size	2.44	2.48
2013 Households	737	2,218,134
2013 Average Household Size	2.42	2.48
2008-2013 Annual Rate	1.00%	1.00%

### Income:



#### Median Household Income

2000	\$31,567	\$47,143
2008	\$39,934	\$62,757
2013	\$45,227	\$73,083

#### Per Capita Income

2000	\$15,802	\$23,199
2008	\$20,349	\$31,884
2013	\$22,519	\$38,864

#### 2008 Household by Income

Household Income Base	701	2,099,736
<15,000	14.1%	7.8%
\$15,000 - \$24,999	15.7%	8.1%
\$25,000 - \$34,999	14.1%	8.8%
\$35,000 - \$49,999	19.3%	13.5%
\$50,000 - \$74,999	22.7%	22.1%
\$75,000 - \$99,999	7.0%	14.3%
\$100,000 - \$149,999	4.4%	16.6%
\$150,000 - \$199,999	1.4%	4.2%
\$200,000+	1.3%	4.5%
Average Household Income	\$48,573	\$80,432

#### 2013 Household by Income

Household Income Base	737	2,218,133
<15,000	12.3%	6.3%
\$15,000 - \$24,999	13.8%	6.6%
\$25,000 - \$34,999	12.5%	6.3%
\$35,000 - \$49,999	17.6%	10.4%
\$50,000 - \$74,999	26.2%	22.0%
\$75,000 - \$99,999	9.5%	15.6%
\$100,000 - \$149,999	5.4%	21.2%
\$150,000 - \$199,999	1.2%	5.5%
\$200,000+	1.0%	6.0%
Average Household Income	\$53,181	\$97,774

#### 2008 Households by Disposable Income

Total Households	703	2,099,736
<\$15,000	18.3%	9.8%
\$15,000 - \$34,999	19.1%	10.7%
\$35,000 - \$49,999	20.1%	17.7%
\$50,000 - \$74,999	16.8%	23.9%
\$75,000 - \$99,999	3.4%	11.7%
\$100,000 - \$149,999	2.9%	9.5%
\$150,000 - \$199,999	0.5%	2.1%
\$200,000 +	0.7%	2.4%
Average Disposable Income	\$39,828	\$63,250
Median Disposable Income	\$31,254	\$49,570

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

	<i>Hill City</i>	<i>Minnesota</i>
<b>2008 Households by Net Worth</b>		
Total Households	703	2,099,736
<\$15,000	31.5%	19.9%
\$15,000 - \$34,999	11.1%	7.6%
\$35,000 - \$49,999	5.5%	4.7%
\$50,000 - \$74,999	8.5%	6.3%
\$75,000 - \$99,999	7.6%	5.0%
\$100,000 - \$149,999	10.2%	9.9%
\$150,000 - \$249,999	8.4%	12.3%
\$250,000 - \$499,999	5.9%	16.0%
\$500,000-\$999,999	8.5%	10.8%
\$1,000,000+	2.66%	7.54%
2008 Average Net Worth	\$243,369	\$493,460
2008 Median Net Worth	\$54,617	\$129,686

### Housing:



	<i>Hill City</i>	<i>Minnesota</i>
<b>2008 Housing Units</b>		
Owner Occupied Housing Units	52.7%	67.0%
Renter Occupied Housing Units	6.2%	23.2%
Vacant Housing Units	52.1%	9.7%

<b>2013 Housing Units</b>		
Owner Occupied Housing Units	52.6%	66.0%
Renter Occupied Housing Units	6.4%	23.5%
Vacant Housing Units	52.1%	10.5%

	<i>Hill City</i>	<i>Minnesota</i>
<b>Median Home Value</b>		
2000	\$74,239	\$118,064
2008	\$120,513	\$187,003
2013	\$125,507	\$196,336

	<i>Hill City</i>	<i>Minnesota</i>
<b>2008 Owner Occupied HUs by Value</b>		
Total Housing Units	629	1,559,119
<50,000	15.1%	5.6%
\$50,000 - \$99,999	24.7%	10.6%
\$100,000 - \$149,999	25.2%	18.8%
\$150,000 - \$199,999	14.5%	20.7%
\$200,000 - \$299,999	12.4%	26.5%
\$300,000 - \$499,999	6.4%	13.1%
\$500,000 - \$999,999	1.3%	3.9%
\$1,000,000 +	0.4%	0.9%
Average Home Value	\$145,816	\$219,229
Median Home Value	\$120,513	\$187,003

	<i>Hill City</i>	<i>Minnesota</i>
<b>2000 Housing Units by Units in Structure</b>		
Total Housing Units	1,101	2,065,946
1, Detached	70.3%	67.8%
1, Attached	0.5%	5.2%
2	0.2%	3.0%
3 or 4	0.2%	2.3%
5 to 9	2.4%	2.4%
10 to 19	5.4%	3.8%
20 +	0.7%	10.7%
Mobile Home	18.3%	4.5%
Other	2.0%	0.0%

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

	<i>Hill City</i>	<i>Minnesota</i>
<b>2000 Housing Units by Year Structure Built</b>		
Total Housing Units	1,100	2,065,946
1999 to March 2000	2.7%	2.3%
1995 to 1998	11.9%	6.6%
1990 to 1994	10.0%	7.0%
1980 to 1989	12.0%	14.0%
1970 to 1979	25.5%	18.2%
1969 or Earlier	37.6%	51.2%
Median Year Structure Built	1975	1969

### Population Demographics:



<b>Median Age</b>	<i>Hill City</i>	<i>Minnesota</i>
2000	42.5	35.4
2008	46.6	36.9
2013	48.8	37.6

<b>2008 Population by Age</b>		
Total Population	1,714	5,357,700
0 - 4	5.0%	6.8%
5 - 9	4.9%	6.5%
10 - 14	5.4%	6.7%
15 - 24	10.8%	14.1%
25 - 34	9.8%	13.1%
35 - 44	11.6%	14.4%
45 - 54	17.2%	15.2%
55 - 64	15.1%	10.9%
65 - 74	12.3%	6.0%
75 - 84	6.2%	4.1%
85 +	1.8%	2.1%
18 +	81.2%	75.8%

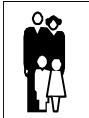
<b>2008 Population by Race/Ethnicity</b>		
Total Population	1,715	5,357,700
White Alone	97.4%	87.2%
Black Alone	0.4%	4.2%
American Indian Alone	0.9%	1.1%
Asian or Pacific Islander Alone	0.1%	3.8%
Some Other Race Alone	0.0%	1.8%
Two or More Races	1.2%	2.0%
Hispanic Origin	1.1%	3.9%
Diversity Index	7.1	29.4

<b>2008 Population 25+ by Educational Attainment</b>		
Total Population	1,269	3,526,447
Less Than 9th Grade	5.9%	3.8%
9th to 12th Grade, No Diploma	9.6%	5.8%
High School Graduate	40.5%	28.8%
Some College, No Degree	25.1%	22.6%
Associate Degree	7.6%	9.0%
Bachelor's Degree	7.2%	20.6%
Master's/Prof/Doctorate Degree	4.0%	9.4%

<b>2008 Population 15+ by Marital Status</b>		
Total Population	1,453	4,284,069
Never Married	21.3%	28.7%
Married, Not Separated	61.5%	56.9%
Married, Separated	17.2%	14.4%
Widowed	6.3%	5.2%
Divorced	10.8%	9.2%

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

### Household Demographics:



#### 2000 Households by Type

	<i>Hill City</i>	<i>Minnesota</i>
Total	647	1,895,127
Family Households	70.6%	66.2%
Married-couple Family	59.8%	53.7%
With Related Children	21.0%	25.8%
Other Family (No Spouse)	10.8%	12.5%
With Related Children	7.6%	8.5%
Nonfamily Households	29.5%	33.8%
Householder Living Alone	24.6%	26.9%
Householder Not Living Alone	4.8%	6.9%

#### 2000 Households by Size

	<i>Hill City</i>	<i>Minnesota</i>
Total	647	1,895,127
1 Person Household	24.6%	26.9%
2 Person Household	41.1%	33.9%
3 Person Household	14.1%	15.0%
4 Person Household	11.1%	14.4%
5 Person Household	5.7%	6.5%
6 Person Household	1.7%	2.1%
7 + Person Household	1.7%	1.2%
Households with Related Children	28.6%	34.3%
Households with Persons 65+	30.9%	21.3%

#### 2000 Households by Year Householder Moved In

	<i>Hill City</i>	<i>Minnesota</i>
Total	647	1,895,127
Moved in 1999 to March 2000	17.8%	17.6%
Moved in 1995 to 1998	27.7%	28.4%
Moved in 1990 to 1994	18.2%	17.4%
Moved in 1980 to 1989	19.2%	16.6%
Moved in 1970 to 1979	10.0%	10.0%
Moved in 1969 or Earlier	7.1%	10.0%
Median Year Householder Moved In	1994	1994

#### 2000 Households by Vehicles Available

	<i>Hill City</i>	<i>Minnesota</i>
Total	646	1,895,127
None	6.2%	7.7%
1	28.8%	31.2%
2	44.5%	42.2%
3	15.7%	13.7%
4	3.5%	3.8%
5+	1.5%	1.5%
Average Number of Vehicles Available	1.9	1.8

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

### Employment:



	<i>Hill City</i>	<i>Minnesota</i>
<b>2008 Employed Population 16+ by Industry</b>		
Total		
Agriculture/Mining	745 4.3%	2,752,132 1.9%
Construction	11.4%	6.4%
Manufacturing	14.5%	13.4%
Wholesale Trade	3.0%	3.5%
Retail Trade	10.1%	11.1%
Transportation/Utilities	6.6%	4.8%
Information	0.8%	2.1%
Finance/Insurance/Real Estate	4.6%	8.0%
Services	39.6%	45.8%
Public Administration	5.2%	3.0%
<b>2008 Employed Population 16+ by Occupation</b>		
Total	745	2,752,132
White Collar	47.4%	62.5%
Management/Business/Financial	12.2%	15.5%
Professional	12.8%	22.4%
Sales	8.7%	11.3%
Administrative Support	13.7%	13.3%
Services	19.3%	15.8%
Blue Collar	33.3%	21.7%
Farming/Forestry/Fishing	1.9%	0.5%
Construction/Extraction	8.3%	5.0%
Installation/Maintenance/Repair	3.6%	3.5%
Production	10.1%	7.2%
Transportation/Material Moving	9.4%	5.6%
<b>2000 Workers 16+ by Means of Transportation to Work</b>		
Total	666	2,541,611
Drove Alone - Car, Truck, or Van	74.0%	77.6%
Carpooled - Car, Truck, or Van	13.8%	10.4%
Public Transportation	0.5%	3.2%
Walked	4.7%	3.3%
Other Means	1.8%	0.9%
Worked at Home	5.3%	4.6%
<b>2000 Workers 16+ by Travel Time to Work</b>		
Total	664	2,541,611
Did not Work at Home	94.7%	95.4%
Less than 5 minutes	6.2%	4.4%
5 to 9 minutes	12.0%	13.3%
10 to 19 minutes	16.9%	31.0%
20 to 24 minutes	13.6%	14.4%
25 to 34 minutes	24.5%	17.3%
35 to 44 minutes	5.3%	5.4%
45 to 59 minutes	9.5%	5.3%
60 to 89 minutes	3.3%	2.7%
90 or more minutes	3.5%	1.5%
Worked at Home	5.3%	4.6%
Average Travel Time to Work (in min)	26.7	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](http://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 of Households	Percent	Index
31 Rural Resort Dwellers	336	47.8%	2,969
50 Heartland Communities	187	26.6%	1,220
46 Rooted Rural	180	25.6%	1,049

## 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.

## 31 Rural Resort Dwellers

Favoring milder climates and pastoral settings, Rural Resort Dwellers residents live in rural, nonfarm areas. These small, growing communities mainly consist of single-family and mobile homes, with a significant inventory of seasonal housing. This somewhat older market has a median age of 47.1 years. Most households consist of married couples with no children living at home or singles who live alone. A higher-than-average proportion of residents are self employed and work from home. The median household income is \$47,908. Modest living and simple consumer tastes describe this market. The rural setting calls for more riding lawn mowers and satellite dishes. Lawn maintenance and gardening is a priority, and households own a plethora of tools and equipment. Many households own or lease a truck. Residents enjoy boating, hunting, fishing, snorkeling, canoeing, and listening to country music.

## 46 Rooted Rural

Rooted Rural neighborhoods are located in rural areas throughout the country; however, more than three-fifths of the households are located in the South. Households are dominated by married-couple families. One-third of the households receive Social Security benefits. The median age is 42.2 years. Housing is predominantly single-family dwellings, with a strong presence of mobile homes and some seasonal housing. The median home value is \$101,198. Stable and settled, residents tend to move infrequently. They are do-it-yourselfers, constantly working on their homes, gardens, and vehicles. Many families have pets. Residents enjoy hunting, fishing, target shooting, boating, attending country music concerts, and listening to country music on the radio. Many households have a satellite dish; favorite stations include Outdoor Life Network and CMT.

Source: ESRI, 2008 Estimates and Projections



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## Tapestry LifeMode Groups

## 2008 Households

	Number	Percent	Index
<b>Total</b>	703	100.0%	
<b>L1. High Society</b>	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
<b>L2. Upscale Avenues</b>	0	0.0%	0
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	0	0.0%	0
18 Cozy and Comfortable	0	0.0%	0
<b>L3. Metropolis</b>	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
<b>L4. Solo Acts</b>	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
<b>L5. Senior Styles</b>	187	26.6%	213
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	187	26.6%	1,220
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 Mediarmk Research's Doublebase customer survey (see Appendix 1 for details)

## Tapestry LifeMode Groups

## 2008 Households

	Number	Percent	Index
<b>Total</b>	703	100.0%	
<b>L6. Scholars &amp; Patriots</b>	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
<b>L7. High Hopes</b>	0	0.0%	0
28 Aspiring Young Families	0	0.0%	0
48 Great Expectations	0	0.0%	0
<b>L8. Global Roots</b>	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
<b>L9. Family Portrait</b>	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
<b>L10. Traditional Living</b>	0	0.0%	0
24 Main Street, USA	0	0.0%	0
32 Rustbelt Traditions	0	0.0%	0
33 Midlife Junction	0	0.0%	0
34 Family Foundations	0	0.0%	0
<b>L11. Factories &amp; Farms</b>	0	0.0%	0
25 Salt of the Earth	0	0.0%	0
37 Prairie Living	0	0.0%	0
42 Southern Satellites	0	0.0%	0
53 Home Town	0	0.0%	0
56 Rural Bypasses	0	0.0%	0
<b>L12. American Quilt</b>	516	73.4%	797
26 Midland Crowd	0	0.0%	0
31 Rural Resort Dwellers	336	47.8%	2,969
41 Crossroads	0	0.0%	0
46 Rooted Rural	180	25.6%	1,049
66 Unclassified	0	0.0%	0

**Source:** ESRI, 2008 Estimates and Projections

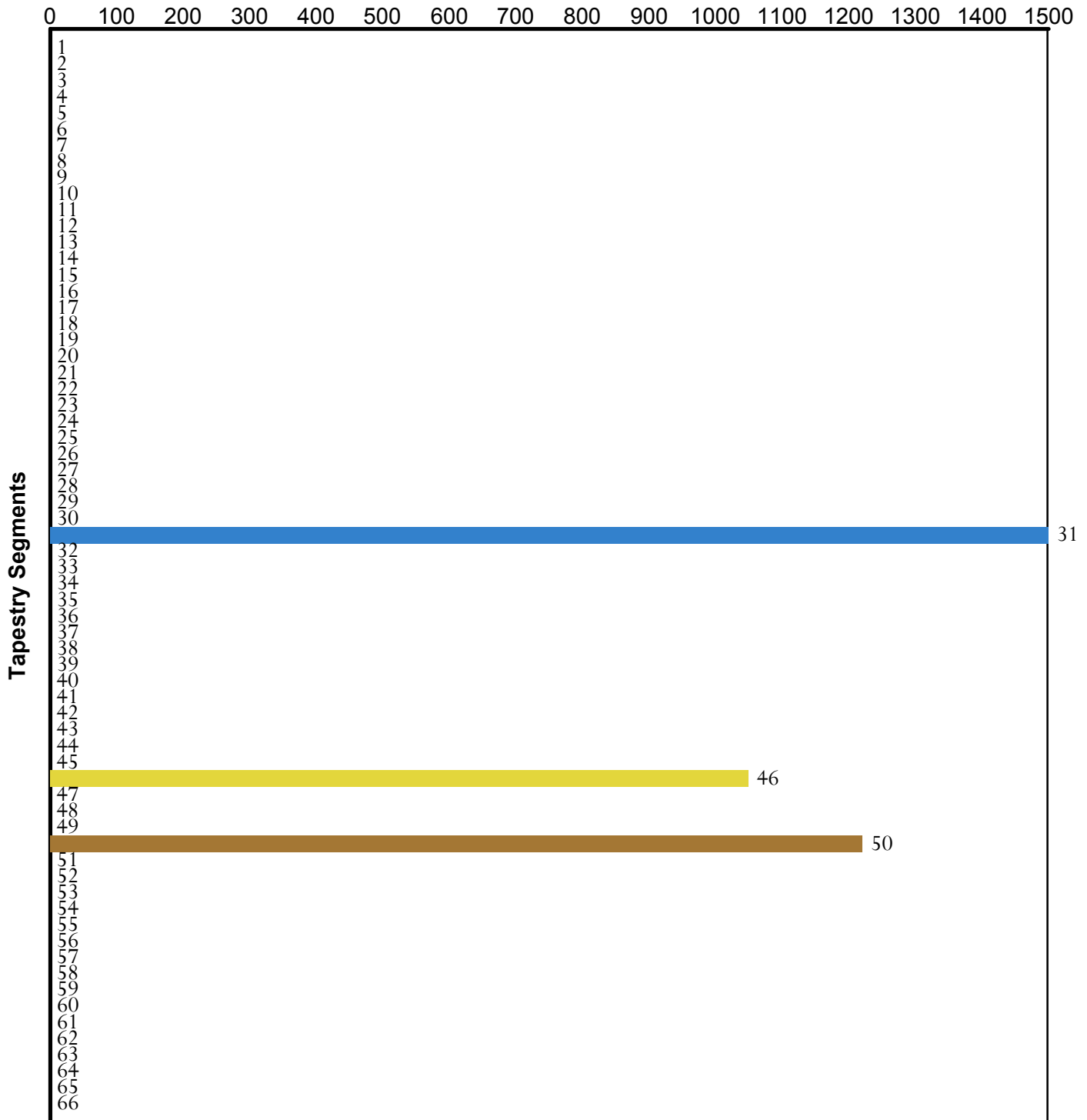
**Data Note:** This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households in the area, by Tapestry segment, to the percent of households or population in the United States, by 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	167	24%	117
Light-medium magazine reader	154	22%	109
Medium magazine reader	142	20%	102
Medium-heavy magazine reader	108	15%	77
Heavy magazine reader	132	19%	94
Read boating magazines	29	4%	143
Read fishing/hunting magazines	155	22%	169
Read gardening magazines	55	8%	164

### B. Newspaper Readership

Light newspaper reader	180	26%	124
Light-medium newspaper reader	132	19%	93
Medium newspaper reader	135	19%	96
Medium-heavy newspaper reader	127	18%	92
Heavy newspaper reader	129	18%	93
Read any daily newspaper	325	46%	96
Read any Sunday newspaper	349	50%	85
Read newspaper: editorial page section	261	37%	119
Read newspaper: food/cooking section	190	27%	106

### C. Radio Listenership

Light radio listener	179	25%	127
Light-medium radio listener	133	19%	95
Medium radio listener	121	17%	86
Medium-heavy radio listener	123	17%	87
Heavy radio listener	148	21%	105
Radio format listen to: adult contemporary	145	21%	115
Radio format listen to: country	254	36%	171
Radio format listen to: public	24	3%	115

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	294	42%	96
Hotel/motel stayed in/12 mo: Days Inn	51	7%	143
Hotel/motel stayed in/12 mo: Econo Lodge	24	3%	158
Hotel/motel stayed in/12 mo: Motel 6	21	3%	119
Hotel/motel stayed in/12 mo: Super 8	39	6%	171
Spent on domestic vacations last 12 mo: <\$1000	109	16%	108
Spent on domestic vacations last 12 mo: \$1000-1499	45	6%	86
Spent on domestic vacations last 12 mo: \$1500-1999	29	4%	98
Spent on domestic vacations last 12 mo: \$2000-2999	18	3%	66
Spent on domestic vacations last 12 mo: \$3000+	21	3%	75
Domestic travel for business in last 12 months	52	7%	87
Domestic travel for personal reasons in last 12 mo	118	17%	106
Domestic travel for vacation/honeymoon last 12 mo	249	35%	96

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

Did indoor gardening/plant care in last 12 months	147	21%	121
Bought lottery ticket in last 12 months	248	35%	94
Read book in last 12 months	294	42%	105
Did woodworking in last 12 months	63	9%	157
Dined out in last 12 months	369	53%	105
Dine out < once a month	33	5%	104
Dine out once a month	39	6%	89
Dine out 2-3 times a month	95	14%	115
Dine out once a week	96	14%	116
Dine out 2+ times per week	72	10%	97
Attended movies in last 6 months	331	47%	77
Played bingo in last 12 months	38	5%	125
Did birdwatching in last 12 months	66	9%	197
Participated in hunting with rifle	87	12%	231
Participated in hunting with shotgun	64	9%	201
Participated in fishing (fresh water)	157	22%	159

Please see Appendix 1 for more detail.

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.

# Preliminary Recommendations: Business Opportunities

## *Introduction:*

In May, 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. Rental shop
2. General merchandise
3. Hardware
4. Tourism-related businesses
5. Amusement-related businesses

\*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: Hill City

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)
<b>Vehicle, Furniture, and Building Materials</b>							
44111	New car dealers	\$ 2,596	\$23,849,936	\$ 4,452,688	0.2	0	0.2
44112	Used car dealers **	\$ 185	\$ 660,285	\$ 316,894	0.5	0	0.5
44121	Recreational vehicle dealers **	\$ 68	\$ 2,031,511	\$ 117,158	0.1	0	0.1
44122	Motorcycle, boat, & other motor vehicles**	\$ 211	\$ 1,425,017	\$ 362,620	0.3	2	-1.7
4413	Automotive parts, accessories, & tire stores	\$ 243	\$ 827,757	\$ 416,689	0.5	0	0.5
4421	Furniture stores	\$ 213	\$ 1,749,541	\$ 365,395	0.2	0	0.2
4422	Home furnishings stores	\$ 191	\$ 861,742	\$ 327,945	0.4	0	0.4
44311	Appliance, television, & other electronics stores	\$ 353	\$ 2,165,660	\$ 604,716	0.3	0	0.3
44312	Computer & software stores	\$ 67	\$ 1,042,462	\$ 114,125	0.1	0	0.1
44313	Camera & photographic supplies stores	\$ 19	\$ 1,025,277	\$ 32,738	0.0	0	0.0
44411	Home centers	\$ 421	\$14,860,573	\$ 721,443	0.0	0	0.0
44412	Paint & wallpaper stores	\$ 34	\$ 1,087,977	\$ 58,490	0.1	0	0.1
44413	Hardware stores	\$ 114	\$ 1,078,077	\$ 195,653	0.2	0	0.2
44419	Specialized building material dealers	\$ 489	\$ 2,218,778	\$ 839,318	0.4	0	0.4
4442	Lawn & garden equipment & supplies stores	\$ 289	\$ 2,004,603	\$ 495,736	0.2	0	0.2
<b>Food, Health, and General Merchandise</b>							
4451	Grocery stores	\$ 1,633	\$ 5,470,174	\$ 2,799,998	0.5	0	0.5
4452	Specialty food stores**	\$ 44	\$ 250,253	\$ 76,156	0.3	0	0.3
4453	Beer, wine, & liquor stores	\$ 224	\$ 1,097,532	\$ 384,420	0.4	1	-0.6
44611	Pharmacies & drug stores	\$ 493	\$ 4,007,090	\$ 846,028	0.2	0	0.2
44612	Cosmetics, beauty supplies, perfume stores**	\$ 19	\$ 77,361	\$ 33,095	0.4	0	0.4
44613	Optical goods stores	\$ 31	\$ 505,027	\$ 52,327	0.1	0	0.1
44619	Other health care (vitamin, medical equip)**	\$ 43	\$ 230,709	\$ 73,817	0.3	0	0.3
4471	Gasoline stations	\$ 1,213	\$ 2,328,291	\$ 2,080,104	0.9	2	-1.1
452	General merchandise stores	\$ 1,888	\$ 9,367,753	\$ 3,238,405	0.3	0	0.3
<b>Clothing</b>							
44811	Men's clothing stores	\$ 22	\$ 710,286	\$ 37,028	0.1	0	0.1
44812	Women's clothing stores	\$ 104	\$ 781,287	\$ 177,683	0.2	0	0.2
44813	Children's & infants' clothing stores	\$ 22	\$ 802,958	\$ 37,150	0.0	0	0.0
44814	Family clothing stores	\$ 217	\$ 2,141,328	\$ 371,870	0.2	0	0.2
44815	Clothing accessories stores**	\$ 9	\$ 166,937	\$ 15,991	0.1	0	0.1
44819	Specialized clothing stores (dress, etc)**	\$ 30	\$ 314,183	\$ 51,696	0.2	0	0.2
44821	Shoe stores	\$ 66	\$ 736,215	\$ 112,741	0.2	0	0.2
44831	Jewelry stores	\$ 84	\$ 562,839	\$ 143,407	0.3	0	0.3
44832	Luggage & leather goods stores	\$ 4	\$ 449,951	\$ 6,157	0.0	0	0.0
<b>Leisure Goods</b>							
45111	Sporting goods stores	\$ 177	\$ 880,427	\$ 303,787	0.3	0	0.3
45112	Hobby, toy, & game stores**	\$ 55	\$ 527,447	\$ 93,832	0.2	0	0.2
45113	Sewing, needlework, & piece goods stores**	\$ 28	\$ 253,456	\$ 47,815	0.2	0	0.2
45114	Musical instrument & supplies stores**	\$ 26	\$ 603,096	\$ 44,213	0.1	0	0.1
45121	Traveler accommodation	\$ 56	\$ 414,203	\$ 95,684	0.2	0	0.2
45122	Tape, compact disc, & record stores	\$ 19	\$ 560,296	\$ 32,678	0.1	0	0.1

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)
<b>Miscellaneous Retail</b>							
4531	Florists	\$ 41	\$ 253,814	\$ 70,955	0.3	0	0.3
45321	Office supplies & stationery stores	\$ 62	\$ 1,413,141	\$ 106,820	0.1	0	0.1
45322	Gift, novelty, & souvenir stores**	\$ 84	\$ 218,920	\$ 143,443	0.7	1	-0.3
4533	Used merchandise stores	\$ 36	\$ 120,809	\$ 61,799	0.5	0	0.5
45391	Pet & pet supplies stores	\$ 36	\$ 629,999	\$ 61,580	0.1	0	0.1
45392	Art dealers**	\$ 11	\$ 134,523	\$ 19,154	0.1	0	0.1
45393	Manufactured (mobile) home dealers	\$ 39	\$ 2,113,960	\$ 66,811	0.0	0	0.0
51213	Motion picture & video exhibition**	\$ 41	\$ 508,869	\$ 70,963	0.1	0	0.1
54192	Photographic services	\$ 75	\$ 721,509	\$ 129,061	0.2	0	0.2
<b>Rental</b>							
5321	Automotive equipment rental & leasing	\$ 185	\$ 5,065,240	\$ 316,870	0.1	0	0.1
53222	Formal wear & costume rental**	\$ 4	\$ 271,278	\$ 7,690	0.0	0	0.0
53223	Video tape & disc rental	\$ 31	\$ 415,012	\$ 52,465	0.1	1	-0.9
5323	General rental centers**	\$ 20	\$ 49,757	\$ 35,083	0.7	0	0.7
<b>Amusement and Recreation</b>							
7131	Amusement parks & arcades**	\$ 27	\$ 51,030	\$ 45,557	0.9	0	0.9
7139	Other amusement (bowling, golf, fitness)	\$ 230	\$ 508,628	\$ 394,253	0.8	1	-0.2
<b>Accommodation and Food Services</b>							
7211	Traveler accommodation	\$ 460	\$ 1,673,589	\$ 788,493	0.5	4	-3.5
7212	RV parks & recreational camps**	\$ 25	\$ 218,442	\$ 42,419	0.2	0	0.2
7221	Full-service restaurants	\$ 597	\$ 829,891	\$ 1,024,263	1.2	1	0.2
7222	Limited-service eating places	\$ 491	\$ 499,216	\$ 841,417	1.7	0	1.7
7224	Drinking places (alcoholic beverages)	\$ 78	\$ 321,765	\$ 133,459	0.4	1	-0.6
<b>Auto and Equipment Services</b>							
81111	Automotive mechanical & electrical repair**	\$ 203	\$ 242,487	\$ 348,423	1.4	0	1.4
81112	Automotive body, paint, interior, & glass**	\$ 153	\$ 308,050	\$ 262,667	0.9	1	-0.1
81119	Other automotive repair & maintenance**	\$ 47	\$ 189,052	\$ 81,185	0.4	0	0.4
81141	Home/garden equipment & appliance repair**	\$ 14	\$ 90,125	\$ 23,785	0.3	0	0.3
81142	Reupholstery & furniture repair**	\$ 8	\$ 66,137	\$ 14,352	0.2	0	0.2
81143	Footwear & leather goods repair**	\$ 1	\$ 65,556	\$ 1,901	0.0	0	0.0
81149	Personal goods repair (watch, boat, garment) **	\$ 32	\$ 36,396	\$ 55,012	1.5	0	1.5
<b>Personal Services</b>							
812111	Barber shops**	\$ 6	\$ 27,235	\$ 11,119	0.4	0	0.4
812112	Beauty salons**	\$ 118	\$ 74,988	\$ 202,401	2.7	0	2.7
812113	Nail salons**	\$ 9	\$ 43,930	\$ 15,587	0.4	0	0.4
81219	Other personal care services**	\$ 22	\$ 51,882	\$ 38,322	0.7	0	0.7
81231	Coin-operated laundries & drycleaners**	\$ 8	\$ 122,184	\$ 14,451	0.1	0	0.1
81232	Drycleaning & laundry (except coin-operated)	\$ 23	\$ 297,567	\$ 39,848	0.1	0	0.1
81291	Pet care (except veterinary) services**	\$ 9	\$ 40,375	\$ 15,563	0.4	0	0.4
81292	Photofinishing**	\$ 22	\$ 291,245	\$ 37,104	0.1	0	0.1

\* 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

Hill City

Total 2008 Households: 703

Product/Consumer Behavior	<i>Expected Number of Households</i>	<i>Expected Percent of Households</i>	<i>MPI</i>
Light viewer of daytime TV	72	10%	102
Medium viewer of daytime TV	71	10%	100
Heavy viewer of daytime TV	65	9%	91
Light viewer of primetime TV	162	23%	115
Light-medium viewer of primetime TV	128	18%	91
Medium viewer of primetime TV	123	17%	87
HH watched 15+ hours of cable TV last week	391	56%	102
Watched 1-9 hours of cable TV last week	531	76%	102
Watched 10-20 hours of cable TV last week	181	26%	130
Watched 21+ hours of cable TV last week	38	5%	119
Watched last week: A&E Television Network	150	21%	102
Watched last week: ABC Family Channel	154	22%	110
HH has cable TV available in neighborhood	460	65%	71
HH subscribes to cable TV	324	46%	73
HH subscribes to digital cable TV	49	7%	55
HH has pay TV	186	26%	88
HH has satellite dish	239	34%	212
HH watched cable TV last week	530	75%	102
Medium-heavy viewer of primetime TV	128	18%	91
Heavy viewer of primetime TV	162	23%	115
Light magazine reader	167	24%	117
Light-medium magazine reader	154	22%	109
Medium magazine reader	142	20%	102
Medium-heavy magazine reader	108	15%	77
Heavy magazine reader	132	19%	94
Read airline magazines	28	4%	74
Read automotive magazines	94	13%	98
Read baby magazines	34	5%	89
Read boating magazines	29	4%	143
Read bridal magazines	19	3%	60
Read business/finance magazines	78	11%	64
Read computer magazines	27	4%	56

**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	26	4%	72
Read fishing/hunting magazines	155	22%	169
Read gardening magazines	55	8%	164
Read general editorial magazines	332	47%	98
Read health magazines	87	12%	97
Read home service magazines	276	39%	113
Read motorcycle magazines	25	4%	97
Read music magazines	77	11%	89
Read news - weekly magazines	249	35%	83
Read parenthood magazines	87	12%	86
Read science/technology magazines	39	6%	83
Read sports magazines	78	11%	72
Read travel magazines	63	9%	98
Read women's fashion magazines	20	3%	44
Light newspaper reader	180	26%	124
Light-medium newspaper reader	132	19%	93
Medium newspaper reader	135	19%	96
Medium-heavy newspaper reader	127	18%	92
Heavy newspaper reader	129	18%	93
Read any daily newspaper	325	46%	96
Read one daily newspaper	263	37%	98
Read two or more daily newspapers	62	9%	89
Read any Sunday newspaper	349	50%	85
Read one Sunday newspaper	293	42%	83
Read two or more Sunday newspapers	55	8%	94
Read newspaper: business/finance section	188	27%	90
Read newspaper: classified section	277	39%	112
Read newspaper: comics section	242	34%	116
Read newspaper: editorial page section	261	37%	119
Read newspaper: fashion section	89	13%	87
Read newspaper: food/cooking section	190	27%	106
Read newspaper: general news section	422	60%	102
Read newspaper: home/furnishings/gardening section	146	21%	101
Read newspaper: movie listings/reviews section	134	19%	73
Read newspaper: science & technology section	121	17%	99
Read newspaper: sports section	240	34%	100
Read newspaper: travel section	115	16%	85
Read newspaper: TV/radio listings section	165	23%	96
Light radio listener	179	25%	127
Light-medium radio listener	133	19%	95
Medium radio listener	121	17%	86
Medium-heavy radio listener	123	17%	87
Heavy radio listener	148	21%	105
Radio format listen to: adult contemporary	145	21%	115
Radio format listen to: all news	15	2%	38

<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	15	2%	54
Radio format listen to: alternative	27	4%	40
Radio format listen to: classic hits	21	3%	66
Radio format listen to: classic rock	71	10%	94
Radio format listen to: classical	24	3%	85
Radio format listen to: contemporary hit radio	72	10%	55
Radio format listen to: country	254	36%	171
Radio format listen to: Hispanic	14	2%	34
Radio format listen to: jazz	12	2%	39
Radio format listen to: news/talk	54	8%	67
Radio format listen to: oldies	78	11%	96
Radio format listen to: public	24	3%	115
Radio format listen to: religious	27	4%	71
Radio format listen to: rock	69	10%	86
Radio format listen to: soft adult contemporary	19	3%	41
Radio format listen to: sports	15	2%	51
Radio format listen to: urban	27	4%	31
Radio format listen to: variety/other	40	6%	67
Radio listening: auto racing (NASCAR)	57	8%	132
Radio listening: baseball playoffs/World Series	56	8%	90
Radio listening: baseball (regular season)	64	9%	91
Radio listening: basketball (college)	38	5%	95
Radio listening: basketball (pro)	27	4%	66
Radio listening: football (college)	58	8%	96
Radio listening: football-Monday night (pro)	39	6%	88
Radio listening: football-weekend (pro)	63	9%	97
Radio listening: golf	20	3%	109
Radio listening: ice hockey	16	2%	67
Radio listening: NFL playoffs/Superbowl	40	6%	90
Listen to Radio: 6:00 am - 10:00 am weekday	325	46%	86
Listen to Radio: 10:00 am - 3:00 pm weekday	258	37%	96
Listen to Radio: 3:00 pm - 7:00 pm weekday	265	38%	84
Listen to Radio: 7:00 pm - midnight weekday	99	14%	89
Listen to Radio: midnight - 6:00 am weekday	44	6%	117
Listen to Radio: 6:00 am - 10:00 am weekend	247	35%	111
Listen to Radio: 10:00 am - 3:00 pm weekend	274	39%	92
Listen to Radio: 3:00 pm - 7:00 pm weekend	211	30%	90
Listen to Radio: 7:00 pm - midnight weekend	98	14%	84
Listen to Radio: midnight - 6:00 am weekend	32	5%	98

**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

Hill City

Total 2008 Households: 703

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Cooked for fun in last 12 months	63	9%	97
Did crossword puzzle in last 12 months	42	6%	100
Flew a kite in last 12 months	113	16%	104
Did furniture refinishing in last 12 months	21	3%	101
Did indoor gardening/plant care in last 12 months	38	5%	121
Bought lottery ticket in last 12 months	135	19%	94
Bought lottery ticket in last 12 mo: Daily Drawing	150	21%	105
Bought lottery ticket in last 12 mo: Instant Game	110	16%	110
Bought lottery ticket in last 12 mo: Lotto Drawing	25	4%	89
Played lottery: <2 times in last 30 days	9	1%	74
Played lottery: 2-5 times in last 30 days	144	20%	86
Played lottery: 6+ times in last 30 days	144	21%	121
Played musical instrument in last 12 months	91	13%	82
Did painting/drawing in last 12 months	44	6%	112
Did photography in last 12 months	75	11%	95
Read book in last 12 months	78	11%	105
Surfed the Internet in last 12 months	63	9%	76
Played video game in last 12 months	19	3%	87
Did woodworking in last 12 months	167	24%	157
Member of business club	111	16%	115
Member of charitable organization	41	6%	103
Member of church board	37	5%	121
Member of fraternal order	115	16%	141
Member of religious club	29	4%	107
Member of school or college board	7	1%	63
Member of union	83	12%	93
Member of veterans club	379	54%	176
Attended adult education course in last 12 months	130	19%	98
Attended auto show in last 12 months	99	14%	103
Went to bar/night club in last 12 months	163	23%	92
Went to beach in last 12 months	36	5%	79
Attended dance performance in last 12 months	53	8%	74
Danced/went dancing in last 12 months	54	8%	83
Dined out in last 12 months	83	12%	105
Dine out < once a month	65	9%	104
Dine out once a month	162	23%	89
Dine out 2-3 times a month	96	14%	115
Dine out once a week	271	39%	116
Dine out 2+ times per week	27	4%	97

**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.

<b>Product/Consumer Behavior</b>	<b>Expected Number of Households</b>	<b>Expected Percent of Households</b>	<b>MPI</b>
Gambled at casino in last 12 months	162	23%	92
Gambled at casino 6+ times in last 12 months	72	10%	73
Gambled in Atlantic City in last 12 months	15	2%	42
Gambled in Las Vegas in last 12 months	43	6%	61
Attended horse races in last 12 months	47	7%	67
Attended movies in last 6 months	55	8%	77
Attended movies in last 90 days: < once a month	121	17%	86
Attended movies in last 90 days: once a month	87	12%	62
Attended movies in last 90 days: 2-3 times a month	88	13%	63
Attended movies in last 90 days: once/week or more	238	34%	62
Prefer to see movie after second week of release	399	57%	76
Went to museum in last 12 months	105	15%	76
Attended music performance in last 12 months	26	4%	82
Attended country music performance in last 12 mo	226	32%	155
Attended rock music performance in last 12 months	81	12%	58
Went to live theater in last 12 months	454	65%	71
Visited a theme park in last 12 months	281	40%	63
Visited Disneyland (CA) in last 12 months	36	5%	40
Visited Disney World (FL)/12 mo: Animal Kingdom	176	25%	84
Visited Disney World (FL)/12 mo: Epcot Center	84	12%	74
Visited Disney World (FL)/12 mo: Magic Kingdom	448	64%	86
Visited Disney World (FL)/12 mo: MGM Studios	66	9%	60
Visited any Sea World in last 12 months	170	24%	106
Visited any Six Flags in last 12 months	15	2%	60
Visited Universal Studios (FL) in last 12 months	57	8%	93
Went to zoo in last 12 months	94	13%	68
Played backgammon in last 12 months	183	26%	74
Played billiards/pool in last 12 months	85	12%	77
Played bingo in last 12 months	102	14%	125
Did birdwatching in last 12 months	488	69%	197
Played board game in last 12 months	36	5%	81
Played cards in last 12 months	96	14%	97
Played chess in last 12 months	88	12%	89
Participated in hunting with rifle	408	58%	231
Participated in hunting with shotgun	67	9%	201
Participated in ice skating	66	9%	66
Play golf once a month	34	5%	61
Play golf 2-3 times a month	91	13%	102
Participated in horseback riding	181	26%	107
Participated in jogging/running	75	11%	53
Participated in motorcycling	178	25%	127
Participated in roller blading	11	2%	61
Participated in roller skating	51	7%	97
Participated in snorkeling	28	4%	61

**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.

<b>Product/Consumer Behavior</b>	<b>Expected Number of Households</b>	<b>Expected Percent of Households</b>	<b>MPI</b>
Participated in soccer	11	2%	66
Participated in softball	38	5%	79
Participated in swimming	42	6%	98
Participated in target shooting	49	7%	179
Participated in tennis	16	2%	55
Participated in volleyball	23	3%	108
Participated in walking for exercise	38	5%	102
Participated in water skiing	33	5%	102
Participated in weight lifting	13	2%	63
Participated in yoga	6	1%	52
Spent on high end sports/rec equip/12 mo: <\$100	34	5%	119
Spent on high end sports/rec equip/12 mo: \$100-249	25	4%	88
Spent on high end sports/rec equip/12 mo: \$250+	20	3%	78
Attend sports event: auto racing (NASCAR)	81	12%	106
Attend sports event: auto racing (not NASCAR)	42	6%	96
Attend sports event: baseball game	25	4%	59
Attend sports event: basketball game (college)	35	5%	76
Attend sports event: basketball game (pro)	15	2%	42
Attend sports event: football game (college)	16	2%	78
Attend sports event: football-Mon night game (pro)	50	7%	59
Attend sports event: football-weekend game (pro)	54	8%	50
Attend sports event: golf tournament	46	7%	72
Attend sports event: ice hockey game	19	3%	52
Attend sports event: soccer game	49	7%	57
Participated in aerobics	93	13%	67
Participated in archery	35	5%	164
Participated in auto racing	19	3%	118
Participated in backpacking/hiking	84	12%	122
Participated in baseball	27	4%	52
Participated in basketball	32	5%	71
Participated in bicycling (mountain)	49	7%	99
Participated in bicycling (road)	37	5%	84
Participated in boating (power)	148	21%	153
Participated in bowling	59	8%	77
Participated in canoeing/kayaking	58	8%	156
Participated in downhill skiing	26	4%	77
Participated in fishing (fresh water)	25	4%	159
Participated in fishing (salt water)	56	8%	146
Participated in football	10	1%	63
Participated in Frisbee	19	3%	74
Participated in golf	37	5%	69
Play golf < once a month	44	6%	68

**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.

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# Market Potential: Travel

Hill City

Total 2008 Households: 703

Product/Consumer Behavior	<i>Expected Number of Households</i>	<i>Expected Percent of Households</i>	<i>MPI</i>
Member of 1 frequent flyer program	43	6%	69
Member of 2 frequent flyer programs	26	4%	75
Member of 3+ frequent flyer programs	14	2%	55
Stayed 1+ nights at hotel/motel in last 12 months	294	42%	96
Hotel/motel stayed in/12 mo: Best Western	63	9%	117
Hotel/motel stayed in/12 mo: Comfort Inn	49	7%	123
Hotel/motel stayed in/12 mo: Courtyard	21	3%	116
Hotel/motel stayed in/12 mo: Days Inn	51	7%	143
Hotel/motel stayed in/12 mo: Econo Lodge	24	3%	158
Hotel/motel stayed in/12 mo: Embassy Suites	12	2%	65
Hotel/motel stayed in/12 mo: Fairfield Inn	20	3%	123
Hotel/motel stayed in/12 mo: Hampton Inn	29	4%	105
Hotel/motel stayed in/12 mo: Hilton	15	2%	60
Hotel/motel stayed in/12 mo: Holiday Inn	37	5%	83
Hotel/motel stayed in/12 mo: Holiday Inn Express	26	4%	107
Hotel/motel stayed in/12 mo: Marriott	25	4%	71
Hotel/motel stayed in/12 mo: Motel 6	21	3%	119
Hotel/motel stayed in/12 mo: Ramada Inn	16	2%	81
Hotel/motel stayed in/12 mo: Super 8	39	6%	171
Domestic travel in last 12 months	380	54%	99
Spent on domestic vacations last 12 mo: <\$1000	109	16%	108
Spent on domestic vacations last 12 mo: \$1000-1499	45	6%	86
Spent on domestic vacations last 12 mo: \$1500-1999	29	4%	98
Spent on domestic vacations last 12 mo: \$2000-2999	18	3%	66
Spent on domestic vacations last 12 mo: \$3000+	21	3%	75
Domestic travel for business in last 12 months	52	7%	87
Domestic travel for personal reasons in last 12 mo	118	17%	106
Domestic travel for vacation/honeymoon last 12 mo	249	35%	96
Took 3+ domestic trips by plane in last 12 months	37	5%	69
Took 3+ domestic business trips by plane/12 months	17	2%	83
Took 3+ domestic non-business trips by plane/12 mo	21	3%	71
Airline used for domestic trip/12 mo: American	22	3%	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

<b>Product/Consumer Behavior</b>	<b>Expected Number of Households</b>	<b>Expected Percent of Households</b>	<b>MPI</b>
Airline used for domestic trip/12 mo: Continental	9	1%	48
Airline used for domestic trip/12 mo: Delta	28	4%	89
Airline used for domestic trip/12 mo: Northwest	11	2%	54
Airline used for domestic trip/12 mo: Southwest	27	4%	81
Airline used for domestic trip/12 mo: United	16	2%	63
Airline used for domestic trip/12 mo: US Airways	19	3%	87
Rented car on domestic trip in last 12 months	21	3%	55
Visited on domestic trip last 12 mo: Northeast	85	12%	99
Visited on domestic trip last 12 mo: South	194	28%	94
Visited on domestic trip last 12 mo: North Central	114	16%	112
Visited on domestic trip last 12 mo: West	110	16%	86
Went backpacking/hiking on domestic vacation/12 mo	18	3%	84
Went to beach on domestic vacation in last 12 mo	56	8%	70
Played golf on domestic vacation in last 12 months	16	2%	84
Visited National Park on domestic vacation/12 mo	38	5%	87
Foreign travel in last 3 years	106	15%	63
Spent on foreign vacations last 12 mo: <\$1000	28	4%	77
Spent on foreign vacations last 12 mo: \$1000-2999	19	3%	70
Spent on foreign vacations last 12 mo: \$3000+	19	3%	71
Foreign travel for personal reasons in last 3 yrs	20	3%	66
Foreign travel for vacation/honeymoon last 3 yrs	81	12%	65
Took foreign trip w/all-inclusive travel pkg/3 yrs	33	5%	56
Took foreign trip by cruise ship in last 3 yrs	20	3%	64
Took 3+ foreign trips by plane in last 3 yrs	17	2%	59
Took 3+ foreign vacation trips by plane last 3 yrs	13	2%	60
Airline used for foreign trip/3 yrs: American	21	3%	65
Airline used for foreign trip/3 yrs: British Air	7	1%	58
Airline used for foreign trip/3 yrs: Continental	11	2%	78
Airline used for foreign trip/3 yrs: Delta	22	3%	91
Airline used for foreign trip/3 yrs: Northwest	13	2%	88
Airline used for foreign trip/3 yrs: United	11	2%	47
Visited on foreign trip last 3 yrs: Canada	29	4%	96
Visited on foreign trip last 3 yrs: France	13	2%	65
Visited on foreign trip last 3 yrs: Germany	13	2%	84
Visited on foreign trip last 3 yrs: Hawaii	17	2%	96
Visited on foreign trip last 3 yrs: Italy	11	2%	61
Visited on foreign trip last 3 yrs: Mexico	25	4%	59
Visited on foreign trip last 3 yrs: United Kingdom	12	2%	60
Bought travelers checks in last 12 months	38	5%	74
Took cruise of more than one day in last 3 years	29	4%	52
Member of any frequent flyer program	73	10%	60

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