

At A Glance:

McGregor Market Area Profile, June 2009

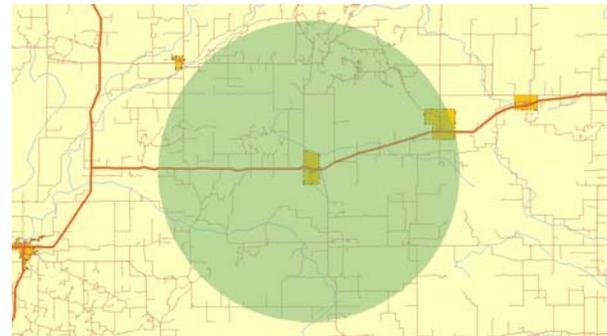


Results based on an analysis from multiple datasources, compiled using Business Analyst from ESRI (www.esri.com) and informed by a local retail study group.

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

How large is the local retail market ?

The extent for this profile includes the City of McGregor and the 10 miles radius around the city. This consists of 3,302 people living in 1,504 households, whose retail goods and services purchases are estimated at \$29 Million.



The *seasonal* retail market includes another 1,932 households whose potential purchases in the area are estimated at \$34 Million.

What do we know about households in the McGregor trade area?

Median Household Income	\$38,318	Median Net Worth	\$56,448
Median Disposable Income	\$30,567	Median Age	50.4
Households with related children	23.1%	Households with persons 65+	36.4%

What do we know about housing in the McGregor trade area ?

Seasonal Housing Units	1,932 or 50% of total	Renter Occupied Units	186 or 4.8% of total
Median home value	\$131,818		

What types of customers live in the McGregor trade area ?

	<i>Rural Resort Dwellers</i>	<i>Senior Sun Seekers</i>	<i>Rooted Rural</i>
Number of HHs	635	476	392
Percent of Households	42.2%	31.6%	26.1%

Demographics

Median Age	47.1 years	52.5 years	42.2 years
Median Household Income	\$47,908	\$39,000	\$38,050
Median Home Value	\$209,920	\$129,600	\$101,198

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

McGregor Trade Area

	<i>Mcgregor</i>	<i>Minnesota</i>
2008 Total Population	3,302	5,357,700
2013 Total Population	3,511	5,636,868
2008-2013 Annual Rate	1.00%	1.00%
2008 Households	1,504	2,099,737
2008 Average Household Size	2.20	2.48
2013 Households	1,615	2,218,134
2013 Average Household Size	2.17	2.48
2008-2013 Annual Rate	1.00%	1.00%
Income:		
		
Median Household Income		
2000	\$29,023	\$47,143
2008	\$38,318	\$62,757
2013	\$43,959	\$73,083
Per Capita Income		
2000	\$17,126	\$23,199
2008	\$22,129	\$31,884
2013	\$25,059	\$38,864
2008 Household by Income		
Household Income Base	1,504	2,099,736
<15,000	15.6%	7.8%
\$15,000 - \$24,999	15.3%	8.1%
\$25,000 - \$34,999	14.8%	8.8%
\$35,000 - \$49,999	17.8%	13.5%
\$50,000 - \$74,999	20.1%	22.1%
\$75,000 - \$99,999	9.8%	14.3%
\$100,000 - \$149,999	3.9%	16.6%
\$150,000 - \$199,999	1.3%	4.2%
\$200,000+	1.3%	4.5%
Average Household Income	\$48,836	\$80,432
2013 Household by Income		
Household Income Base	1,614	2,218,133
<15,000	13.6%	6.3%
\$15,000 - \$24,999	12.8%	6.6%
\$25,000 - \$34,999	12.8%	6.3%
\$35,000 - \$49,999	17.2%	10.4%
\$50,000 - \$74,999	23.7%	22.0%
\$75,000 - \$99,999	10.8%	15.6%
\$100,000 - \$149,999	6.3%	21.2%
\$150,000 - \$199,999	1.3%	5.5%
\$200,000+	2.0%	6.0%
Average Household Income	\$54,777	\$97,774
2008 Households by Disposable Income		
Total Households	1,504	2,099,736
<\$15,000	19.6%	9.8%
\$15,000 - \$34,999	19.1%	10.7%
\$35,000 - \$49,999	18.3%	17.7%
\$50,000 - \$74,999	17.8%	23.9%
\$75,000 - \$99,999	3.6%	11.7%
\$100,000 - \$149,999	2.6%	9.5%
\$150,000 - \$199,000	0.6%	2.1%
\$200,000 +	0.8%	2.4%
Average Disposable Income	\$39,662	\$63,250
Median Disposable Income	\$30,567	\$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).

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

	<i>Mcgregor</i>	McGregor Trade Area Minnesota
2008 Households by Net Worth		
Total Households	1,504	2,099,736
<\$15,000	29.2%	19.9%
\$15,000 - \$34,999	11.7%	7.6%
\$35,000 - \$49,999	6.5%	4.7%
\$50,000 - \$74,999	8.2%	6.3%
\$75,000 - \$99,999	6.4%	5.0%
\$100,000 - \$149,999	8.3%	9.9%
\$150,000 - \$249,999	8.7%	12.3%
\$250,000 - \$499,999	8.7%	16.0%
\$500,000-\$999,999	5.7%	10.8%
\$1,000,000+	6.58%	7.54%
2008 Average Net Worth	\$384,941	\$493,460
2008 Median Net Worth	\$56,448	\$129,686

Housing:



2008 Housing Units		
Owner Occupied Housing Units	34.0%	67.0%
Renter Occupied Housing Units	4.8%	23.2%
Vacant Housing Units	59.7%	9.7%

2013 Housing Units		
Owner Occupied Housing Units	34.3%	66.0%
Renter Occupied Housing Units	4.8%	23.5%
Vacant Housing Units	59.4%	10.5%

Median Home Value		
2000	\$82,263	\$118,064
2008	\$131,818	\$187,003
2013	\$136,759	\$196,336

2008 Owner Occupied HUs by Value		
Total Housing Units	1,319	1,559,119
<50,000	11.5%	5.6%
\$50,000 - \$99,999	24.6%	10.6%
\$100,000 - \$149,999	21.8%	18.8%
\$150,000 - \$199,999	16.0%	20.7%
\$200,000 - \$299,999	14.9%	26.5%
\$300,000 - \$499,999	9.2%	13.1%
\$500,000 - \$999,999	1.5%	3.9%
\$1,000,000 +	0.5%	0.9%
Average Home Value	\$164,125	\$219,229
Median Home Value	\$131,818	\$187,003

2000 Housing Units by Units in Structure		
Total Housing Units	3,412	2,065,946
1, Detached	74.8%	67.8%
1, Attached	0.6%	5.2%
2	0.2%	3.0%
3 or 4	0.1%	2.3%
5 to 9	0.0%	2.4%
10 to 19	0.1%	3.8%
20 +	0.6%	10.7%
Mobile Home	18.3%	4.5%
Other	5.0%	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).

McGregor Trade Area

	<i>Mcgregor</i>	<i>Minnesota</i>
2000 Housing Units by Year Structure Built		
Total Housing Units	3,412	2,065,946
1999 to March 2000	3.1%	2.3%
1995 to 1998	7.7%	6.6%
1990 to 1994	7.0%	7.0%
1980 to 1989	11.0%	14.0%
1970 to 1979	20.8%	18.2%
1969 or Earlier	50.5%	51.2%
Median Year Structure Built	1970	1969

Population Demographics:



Median Age		
2000	47.1	35.4
2008	50.4	36.9
2013	52.6	37.6

2008 Population by Age		
Total Population	3,301	5,357,700
0 - 4	4.1%	6.8%
5 - 9	4.2%	6.5%
10 - 14	4.7%	6.7%
15 - 24	10.3%	14.1%
25 - 34	8.3%	13.1%
35 - 44	10.1%	14.4%
45 - 54	16.0%	15.2%
55 - 64	18.4%	10.9%
65 - 74	14.4%	6.0%
75 - 84	7.5%	4.1%
85 +	2.2%	2.1%
18 +	83.6%	75.8%

2008 Population by Race/Ethnicity		
Total Population	3,302	5,357,700
White Alone	92.7%	87.2%
Black Alone	0.4%	4.2%
American Indian Alone	5.5%	1.1%
Asian or Pacific Islander Alone	0.3%	3.8%
Some Other Race Alone	0.1%	1.8%
Two or More Races	1.0%	2.0%
Hispanic Origin	0.6%	3.9%
Diversity Index	14.8	29.4

2008 Population 25+ by Educational Attainment		
Total Population	2,533	3,526,447
Less Than 9th Grade	5.6%	3.8%
9th to 12th Grade, No Diploma	12.9%	5.8%
High School Graduate	40.6%	28.8%
Some College, No Degree	22.7%	22.6%
Associate Degree	6.7%	9.0%
Bachelor's Degree	7.5%	20.6%
Master's/Prof/Doctorate Degree	4.0%	9.4%

2008 Population 15+ by Marital Status		
Total Population	2,875	4,284,069
Never Married	18.5%	28.7%
Married, Not Separated	62.8%	56.9%
Married, Separated	18.8%	14.4%
Widowed	7.6%	5.2%
Divorced	11.2%	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).

Household Demographics:

Mcgregor

McGregor Trade Area Minnesota



2000 Households by Type

Total	1,311	1,895,127
Family Households	66.7%	66.2%
Married-couple Family	56.1%	53.7%
With Related Children	16.2%	25.8%
Other Family (No Spouse)	10.6%	12.5%
With Related Children	6.9%	8.5%
Nonfamily Households	33.3%	33.8%
Householder Living Alone	29.0%	26.9%
Householder Not Living Alone	4.3%	6.9%

2000 Households by Size

Total	1,312	1,895,127
1 Person Household	28.9%	26.9%
2 Person Household	43.3%	33.9%
3 Person Household	11.9%	15.0%
4 Person Household	8.7%	14.4%
5 Person Household	4.3%	6.5%
6 Person Household	1.8%	2.1%
7 + Person Household	1.1%	1.2%
Households with Related Children	23.1%	34.3%
Households with Persons 65+	36.4%	21.3%

2000 Households by Year Householder Moved In

Total	1,311	1,895,127
Moved in 1999 to March 2000	12.5%	17.6%
Moved in 1995 to 1998	23.5%	28.4%
Moved in 1990 to 1994	19.7%	17.4%
Moved in 1980 to 1989	21.7%	16.6%
Moved in 1970 to 1979	12.1%	10.0%
Moved in 1969 or Earlier	10.6%	10.0%
Median Year Householder Moved In	1991	1994

2000 Households by Vehicles Available

Total	1,312	1,895,127
None	5.2%	7.7%
1	31.9%	31.2%
2	41.2%	42.2%
3	16.2%	13.7%
4	3.8%	3.8%
5+	1.7%	1.5%
Average Number of Vehicles Available	1.9	1.8

McGregor Trade Area

Employment:



2008 Employed Population 16+ by Industry

	<i>Mcgregor</i>	<i>Minnesota</i>
Total		
Agriculture/Mining	1,380	2,752,132
Construction	10.1%	6.4%
Manufacturing	11.7%	13.4%
Wholesale Trade	2.2%	3.5%
Retail Trade	7.9%	11.1%
Transportation/Utilities	5.0%	4.8%
Information	1.3%	2.1%
Finance/Insurance/Real Estate	4.9%	8.0%
Services	47.0%	45.8%
Public Administration	4.5%	3.0%

2008 Employed Population 16+ by Occupation

Total	1,381	2,752,132
White Collar	48.5%	62.5%
Management/Business/Financial	12.4%	15.5%
Professional	16.8%	22.4%
Sales	8.5%	11.3%
Administrative Support	10.9%	13.3%
Services	23.1%	15.8%
Blue Collar	28.4%	21.7%
Farming/Forestry/Fishing	1.5%	0.5%
Construction/Extraction	8.8%	5.0%
Installation/Maintenance/Repair	3.0%	3.5%
Production	7.7%	7.2%
Transportation/Material Moving	7.3%	5.6%

2000 Workers 16+ by Means of Transportation to Work

Total	1,171	2,541,611
Drove Alone - Car, Truck, or Van	70.1%	77.6%
Carpooled - Car, Truck, or Van	13.0%	10.4%
Public Transportation	0.8%	3.2%
Walked	4.4%	3.3%
Other Means	1.5%	0.9%
Worked at Home	10.2%	4.6%

2000 Workers 16+ by Travel Time to Work

Total	1,169	2,541,611
Did not Work at Home	89.8%	95.4%
Less than 5 minutes	6.4%	4.4%
5 to 9 minutes	11.5%	13.3%
10 to 19 minutes	26.3%	31.0%
20 to 24 minutes	10.9%	14.4%
25 to 34 minutes	15.1%	17.3%
35 to 44 minutes	5.6%	5.4%
45 to 59 minutes	5.2%	5.3%
60 to 89 minutes	5.2%	2.7%
90 or more minutes	3.7%	1.5%
Worked at Home	10.2%	4.6%
Average Travel Time to Work (in min)	25.7	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).



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	635	42.2%	2,622
49 Senior Sun Seekers	476	31.6%	2,660
46 Rooted Rural	392	26.1%	1,068

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.

49 Senior Sun Seekers

The Senior Sun Seekers market is one of the faster growing markets, located mainly in the South and West, especially in Florida. Escaping from cold winter climates, many residents have permanently relocated to warmer areas; others are "snowbirds" who move south for the winter. Most residents are retired or are anticipating retirement. The median age is 52.5 years; 63 percent of the householders are aged 55 years or older. Most households are single-family dwellings or mobile homes with a median value of \$129,580. There is a high proportion of seasonal housing. Many residents are members of veterans' clubs or fraternal orders. They own high-paying insurance policies and consult with financial advisors. Leisure activities include dining out, reading (especially boating magazines), watching TV, fishing, playing backgammon and bingo, working crossword puzzles, and gambling at casinos.

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

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

Tapestry LifeMode Groups

2008 Households

	Number	Percent	Index
Total	1,504	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	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
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	477	31.7%	254
14 Prosperous Empty Nesters	0	0.0%	0
15 Silver and Gold	1	0.1%	7
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	476	31.6%	2,660
50 Heartland Communities	0	0.0%	0
57 Simple Living	0	0.0%	0
65 Social Security Set	0	0.0%	0

Source: ESRI, 2008 Estimates and Projections

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

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

Tapestry LifeMode Groups

2008 Households

	Number	Percent	Index
Total	1,504	100.0%	
L6. Scholars & Patriots	0	0.0%	0
40 Military Proximity	0	0.0%	0
55 College Towns	0	0.0%	0
63 Dorms to Diplomas	0	0.0%	0
L7. High Hopes	0	0.0%	0
28 Aspiring Young Families	0	0.0%	0
48 Great Expectations	0	0.0%	0
L8. Global Roots	0	0.0%	0
35 International Marketplace	0	0.0%	0
38 Industrious Urban Fringe	0	0.0%	0
44 Urban Melting Pot	0	0.0%	0
47 Las Casas	0	0.0%	0
52 Inner City Tenants	0	0.0%	0
58 NeWest Residents	0	0.0%	0
60 City Dimensions	0	0.0%	0
61 High Rise Renters	0	0.0%	0
L9. Family Portrait	0	0.0%	0
12 Up and Coming Families	0	0.0%	0
19 Milk and Cookies	0	0.0%	0
21 Urban Villages	0	0.0%	0
59 Southwestern Families	0	0.0%	0
64 City Commons	0	0.0%	0
L10. Traditional Living	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
L11. Factories & Farms	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
L12. American Quilt	1,027	68.3%	742
26 Midland Crowd	0	0.0%	0
31 Rural Resort Dwellers	635	42.2%	2,622
41 Crossroads	0	0.0%	0
46 Rooted Rural	392	26.1%	1,068
66 Unclassified	0	0.0%	0

Source: ESRI, 2008 Estimates and Projections

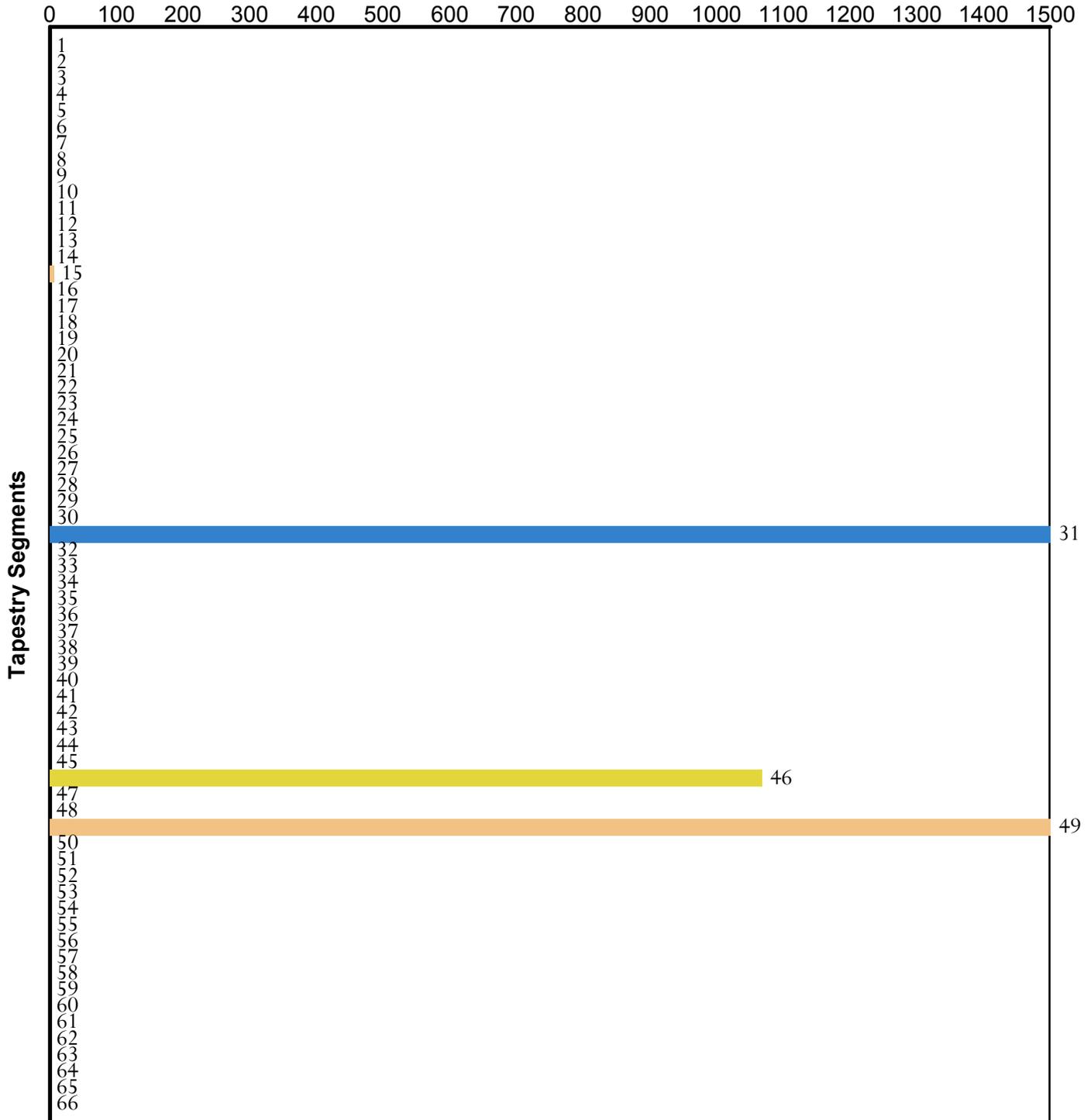
Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. 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 Households</i>	<i>Expected % of Households</i>	<i>MPI</i>
Light magazine reader	362	24%	118
Light-medium magazine reader	341	23%	113
Medium magazine reader	311	21%	104
Medium-heavy magazine reader	217	14%	72
Heavy magazine reader	273	18%	91
Read boating magazines	80	5%	184
Read fishing/hunting magazines	289	19%	147
Read gardening magazines	98	7%	137
Read home service magazines	584	39%	111

B. Newspaper Readership

Light newspaper reader	379	25%	122
Light-medium newspaper reader	287	19%	94
Medium newspaper reader	274	18%	91
Medium-heavy newspaper reader	313	21%	106
Heavy newspaper reader	250	17%	85
Read any daily newspaper	686	46%	95
Read any Sunday newspaper	817	54%	93
Read newspaper: editorial page section	567	38%	121
Read newspaper: general news section	936	62%	106

C. Radio Listenership

Light radio listener	406	27%	134
Light-medium radio listener	283	19%	95
Medium radio listener	270	18%	90
Medium-heavy radio listener	269	18%	89
Heavy radio listener	276	18%	92
Radio format listen to: country	458	30%	144
Radio format listen to: public	49	3%	110
Radio format listen to: adult contemporary	258	17%	95

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	659	44%	101
Hotel/motel stayed in/12 mo: Best Western	126	8%	110
Hotel/motel stayed in/12 mo: Comfort Inn	106	7%	124
Hotel/motel stayed in/12 mo: Courtyard	42	3%	111
Hotel/motel stayed in/12 mo: Days Inn	106	7%	138
Hotel/motel stayed in/12 mo: Econo Lodge	53	4%	166
Domestic travel in last 12 months	842	56%	103
Spent on domestic vacations last 12 mo: <\$1000	232	15%	107
Spent on domestic vacations last 12 mo: \$1000-1499	100	7%	89
Spent on domestic vacations last 12 mo: \$1500-1999	64	4%	103
Spent on domestic vacations last 12 mo: \$2000-2999	44	3%	77
Spent on domestic vacations last 12 mo: \$3000+	54	4%	91
Domestic travel for business in last 12 months	97	6%	76
Domestic travel for personal reasons in last 12 mo	280	19%	117
Domestic travel for vacation/honeymoon last 12 mo	550	37%	99

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

Cooked for fun in last 12 months	247	16%	101
Did indoor gardening/plant care in last 12 months	317	21%	122
Bought lottery ticket in last 12 months	577	38%	102
Did painting/drawing in last 12 months	111	7%	103
Did photography in last 12 months	198	13%	107
Read book in last 12 months	668	44%	111
Did woodworking in last 12 months	125	8%	146
Went to bar/night club in last 12 months	243	16%	77
Went to beach in last 12 months	318	21%	85
Dined out in last 12 months	801	53%	107
Dine out < once a month	69	5%	100
Dine out once a month	80	5%	87
Dine out 2-3 times a month	207	14%	117
Dine out once a week	200	13%	113
Dine out 2+ times per week	171	11%	107

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 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.

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. Fleet supply store
2. Limited-service restaurant
3. Beauty shop
4. Pet supply
5. Computer service
6. Recreational rental
7. Grocery/restaurant
8. Hardware store

*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: McGregor

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

NAICS	Name	MN Sales Per Capita	Average Sales per MN Store	Potential Sales in Trade Area	No. of Stores (Demand)	No. of Stores (Supply)*	Potential Stores (Demand - Supply)
Vehicle, Furniture, and Building Materials							
44111	New car dealers	\$ 2,596	\$23,849,936	\$ 8,573,047	0.4	0	0.4
44112	Used car dealers **	\$ 185	\$ 660,285	\$ 610,137	0.9	0	0.9
44121	Recreational vehicle dealers **	\$ 68	\$ 2,031,511	\$ 225,572	0.1	0	0.1
44122	Motorcycle, boat, & other motor vehicles**	\$ 211	\$ 1,425,017	\$ 698,175	0.5	1	-0.5
4413	Automotive parts, accessories, & tire stores	\$ 243	\$ 827,757	\$ 802,278	1.0	1	0.0
4421	Furniture stores	\$ 213	\$ 1,749,541	\$ 703,519	0.4	0	0.4
4422	Home furnishings stores	\$ 191	\$ 861,742	\$ 631,413	0.7	2	-1.3
44311	Appliance, television, & other electronics stores	\$ 353	\$ 2,165,660	\$ 1,164,299	0.5	1	-0.5
44312	Computer & software stores	\$ 67	\$ 1,042,462	\$ 219,732	0.2	0	0.2
44313	Camera & photographic supplies stores	\$ 19	\$ 1,025,277	\$ 63,032	0.1	0	0.1
44411	Home centers	\$ 421	\$14,860,573	\$ 1,389,041	0.1	1	-0.9
44412	Paint & wallpaper stores	\$ 34	\$ 1,087,977	\$ 112,615	0.1	0	0.1
44413	Hardware stores	\$ 114	\$ 1,078,077	\$ 376,702	0.3	0	0.3
44419	Specialized building material dealers	\$ 489	\$ 2,218,778	\$ 1,615,993	0.7	1	-0.3
4442	Lawn & garden equipment & supplies stores	\$ 289	\$ 2,004,603	\$ 954,473	0.5	2	-1.5
Food, Health, and General Merchandise							
4451	Grocery stores	\$ 1,633	\$ 5,470,174	\$ 5,391,017	1.0	2	-1.0
4452	Specialty food stores**	\$ 44	\$ 250,253	\$ 146,629	0.6	0	0.6
4453	Beer, wine, & liquor stores	\$ 224	\$ 1,097,532	\$ 740,149	0.7	1	-0.3
44611	Pharmacies & drug stores	\$ 493	\$ 4,007,090	\$ 1,628,912	0.4	1	-0.6
44612	Cosmetics, beauty supplies, perfume stores**	\$ 19	\$ 77,361	\$ 63,720	0.8	0	0.8
44613	Optical goods stores	\$ 31	\$ 505,027	\$ 100,748	0.2	0	0.2
44619	Other health care (vitamin, medical equip)**	\$ 43	\$ 230,709	\$ 142,125	0.6	0	0.6
4471	Gasoline stations	\$ 1,213	\$ 2,328,291	\$ 4,004,959	1.7	3	-1.3
452	General merchandise stores	\$ 1,888	\$ 9,367,753	\$ 6,235,111	0.7	1	-0.3
Clothing							
44811	Men's clothing stores	\$ 22	\$ 710,286	\$ 71,293	0.1	0	0.1
44812	Women's clothing stores	\$ 104	\$ 781,287	\$ 342,105	0.4	0	0.4
44813	Children's & infants' clothing stores	\$ 22	\$ 802,958	\$ 71,528	0.1	0	0.1
44814	Family clothing stores	\$ 217	\$ 2,141,328	\$ 715,985	0.3	0	0.3
44815	Clothing accessories stores**	\$ 9	\$ 166,937	\$ 30,789	0.2	0	0.2
44819	Specialized clothing stores (dress, etc)**	\$ 30	\$ 314,183	\$ 99,533	0.3	0	0.3
44821	Shoe stores	\$ 66	\$ 736,215	\$ 217,068	0.3	0	0.3
44831	Jewelry stores	\$ 84	\$ 562,839	\$ 276,111	0.5	0	0.5
44832	Luggage & leather goods stores	\$ 4	\$ 449,951	\$ 11,855	0.0	0	0.0
Leisure Goods							
45111	Sporting goods stores	\$ 177	\$ 880,427	\$ 584,901	0.7	1	-0.3
45112	Hobby, toy, & game stores**	\$ 55	\$ 527,447	\$ 180,661	0.3	0	0.3
45113	Sewing, needlework, & piece goods stores**	\$ 28	\$ 253,456	\$ 92,061	0.4	1	-0.6
45114	Musical instrument & supplies stores**	\$ 26	\$ 603,096	\$ 85,126	0.1	0	0.1
45121	Traveler accommodation	\$ 56	\$ 414,203	\$ 184,227	0.4	1	-0.6
45122	Tape, compact disc, & record stores	\$ 19	\$ 560,296	\$ 62,916	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)
Miscellaneous Retail							
4531	Florists	\$ 41	\$ 253,814	\$ 136,615	0.5	1	-0.5
45321	Office supplies & stationery stores	\$ 62	\$ 1,413,141	\$ 205,668	0.1	0	0.1
45322	Gift, novelty, & souvenir stores**	\$ 84	\$ 218,920	\$ 276,180	1.3	3	-1.7
4533	Used merchandise stores	\$ 36	\$ 120,809	\$ 118,985	1.0	0	1.0
45391	Pet & pet supplies stores	\$ 36	\$ 629,999	\$ 118,564	0.2	0	0.2
45392	Art dealers**	\$ 11	\$ 134,523	\$ 36,878	0.3	0	0.3
45393	Manufactured (mobile) home dealers	\$ 39	\$ 2,113,960	\$ 128,636	0.1	0	0.1
51213	Motion picture & video exhibition**	\$ 41	\$ 508,869	\$ 136,629	0.3	0	0.3
54192	Photographic services	\$ 75	\$ 721,509	\$ 248,489	0.3	0	0.3
Rental							
5321	Automotive equipment rental & leasing	\$ 185	\$ 5,065,240	\$ 610,091	0.1	1	-0.9
53222	Formal wear & costume rental**	\$ 4	\$ 271,278	\$ 14,806	0.1	0	0.1
53223	Video tape & disc rental	\$ 31	\$ 415,012	\$ 101,015	0.2	0	0.2
5323	General rental centers**	\$ 20	\$ 49,757	\$ 67,547	1.4	0	1.4
Amusement and Recreation							
7131	Amusement parks & arcades**	\$ 27	\$ 51,030	\$ 87,713	1.7	0	1.7
7139	Other amusement (bowling, golf, fitness)	\$ 230	\$ 508,628	\$ 759,080	1.5	4	-2.5
Accommodation and Food Services							
7211	Traveler accommodation	\$ 460	\$ 1,673,589	\$ 1,518,136	0.9	5	-4.1
7212	RV parks & recreational camps**	\$ 25	\$ 218,442	\$ 81,672	0.4	4	-3.6
7221	Full-service restaurants	\$ 597	\$ 829,891	\$ 1,972,079	2.4	10	-7.6
7222	Limited-service eating places	\$ 491	\$ 499,216	\$ 1,620,035	3.2	1	2.2
7224	Drinking places (alcoholic beverages)	\$ 78	\$ 321,765	\$ 256,957	0.8	4	-3.2
Auto and Equipment Services							
81111	Automotive mechanical & electrical repair**	\$ 203	\$ 242,487	\$ 670,842	2.8	2	0.8
81112	Automotive body, paint, interior, & glass**	\$ 153	\$ 308,050	\$ 505,730	1.6	1	0.6
81119	Other automotive repair & maintenance**	\$ 47	\$ 189,052	\$ 156,312	0.8	0	0.8
81141	Home/garden equipment & appliance repair**	\$ 14	\$ 90,125	\$ 45,795	0.5	0	0.5
81142	Reupholstery & furniture repair**	\$ 8	\$ 66,137	\$ 27,632	0.4	0	0.4
81143	Footwear & leather goods repair**	\$ 1	\$ 65,556	\$ 3,660	0.1	0	0.1
81149	Personal goods repair (watch, boat, garment) **	\$ 32	\$ 36,396	\$ 105,918	2.9	1	1.9
Personal Services							
812111	Barber shops**	\$ 6	\$ 27,235	\$ 21,408	0.8	1	-0.2
812112	Beauty salons**	\$ 118	\$ 74,988	\$ 389,696	5.2	3	2.2
812113	Nail salons**	\$ 9	\$ 43,930	\$ 30,011	0.7	0	0.7
81219	Other personal care services**	\$ 22	\$ 51,882	\$ 73,783	1.4	0	1.4
81231	Coin-operated laundries & drycleaners**	\$ 8	\$ 122,184	\$ 27,824	0.2	0	0.2
81232	Drycleaning & laundry (except coin-operated)	\$ 23	\$ 297,567	\$ 76,722	0.3	0	0.3
81291	Pet care (except veterinary) services**	\$ 9	\$ 40,375	\$ 29,964	0.7	0	0.7
81292	Photofinishing**	\$ 22	\$ 291,245	\$ 71,438	0.2	0	0.2

* 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

McGregor

Total 2008 Households: 1,504

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Light viewer of daytime TV	172	11%	114
Medium viewer of daytime TV	162	11%	107
Heavy viewer of daytime TV	148	10%	97
Light viewer of primetime TV	337	22%	112
Light-medium viewer of primetime TV	263	17%	87
Medium viewer of primetime TV	256	17%	85
HH watched 15+ hours of cable TV last week	841	56%	102
Watched 1-9 hours of cable TV last week	1132	75%	101
Watched 10-20 hours of cable TV last week	364	24%	123
Watched 21+ hours of cable TV last week	91	6%	134
HH has cable TV available in neighborhood	1050	70%	76
HH subscribes to cable TV	682	45%	72
HH subscribes to digital cable TV	106	7%	55
HH has pay TV	365	24%	81
HH has satellite dish	520	35%	216
HH watched cable TV last week	1127	75%	101
Medium-heavy viewer of primetime TV	269	18%	89
Heavy viewer of primetime TV	379	25%	126
Light magazine reader	362	24%	118
Light-medium magazine reader	341	23%	113
Medium magazine reader	311	21%	104
Medium-heavy magazine reader	217	14%	72
Heavy magazine reader	273	18%	91
Read airline magazines	51	3%	63
Read automotive magazines	196	13%	96
Read baby magazines	64	4%	80
Read boating magazines	80	5%	184
Read bridal magazines	46	3%	67
Read business/finance magazines	174	12%	67
Read computer magazines	63	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

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	64	4%	83
Read fishing/hunting magazines	289	19%	147
Read gardening magazines	98	7%	137
Read general editorial magazines	715	48%	99
Read health magazines	177	12%	92
Read home service magazines	584	39%	111
Read motorcycle magazines	49	3%	89
Read music magazines	120	8%	65
Read news - weekly magazines	545	36%	85
Read parenthood magazines	144	10%	66
Read science/technology magazines	94	6%	92
Read sports magazines	181	12%	79
Read travel magazines	136	9%	98
Read women's fashion magazines	60	4%	62
Light newspaper reader	379	25%	122
Light-medium newspaper reader	287	19%	94
Medium newspaper reader	274	18%	91
Medium-heavy newspaper reader	313	21%	106
Heavy newspaper reader	250	17%	85
Read any daily newspaper	686	46%	95
Read one daily newspaper	575	38%	100
Read two or more daily newspapers	111	7%	74
Read any Sunday newspaper	817	54%	93
Read one Sunday newspaper	712	47%	94
Read two or more Sunday newspapers	105	7%	83
Read newspaper: business/finance section	438	29%	98
Read newspaper: classified section	539	36%	102
Read newspaper: comics section	552	37%	124
Read newspaper: editorial page section	567	38%	121
Read newspaper: fashion section	197	13%	90
Read newspaper: food/cooking section	426	28%	111
Read newspaper: general news section	936	62%	106
Read newspaper: home/furnishings/gardening section	326	22%	105
Read newspaper: movie listings/reviews section	323	21%	82
Read newspaper: science & technology section	268	18%	103
Read newspaper: sports section	530	35%	103
Read newspaper: travel section	287	19%	99
Read newspaper: TV/radio listings section	400	27%	109
Light radio listener	406	27%	134
Light-medium radio listener	283	19%	95
Medium radio listener	270	18%	90
Medium-heavy radio listener	269	18%	89
Heavy radio listener	276	18%	92
Radio format listen to: adult contemporary	258	17%	95
Radio format listen to: all news	31	2%	36

<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	33	2%	55
Radio format listen to: alternative	69	5%	47
Radio format listen to: classic hits	43	3%	64
Radio format listen to: classic rock	152	10%	94
Radio format listen to: classical	49	3%	84
Radio format listen to: contemporary hit radio	162	11%	57
Radio format listen to: country	458	30%	144
Radio format listen to: Hispanic	31	2%	37
Radio format listen to: jazz	37	2%	55
Radio format listen to: news/talk	122	8%	71
Radio format listen to: oldies	139	9%	81
Radio format listen to: public	49	3%	110
Radio format listen to: religious	48	3%	59
Radio format listen to: rock	143	10%	84
Radio format listen to: soft adult contemporary	56	4%	57
Radio format listen to: sports	38	3%	59
Radio format listen to: urban	71	5%	38
Radio format listen to: variety/other	99	7%	77
Radio listening: auto racing (NASCAR)	109	7%	119
Radio listening: baseball playoffs/World Series	115	8%	87
Radio listening: baseball (regular season)	133	9%	88
Radio listening: basketball (college)	72	5%	83
Radio listening: basketball (pro)	58	4%	65
Radio listening: football (college)	106	7%	82
Radio listening: football-Monday night (pro)	67	4%	71
Radio listening: football-weekend (pro)	116	8%	83
Radio listening: golf	41	3%	104
Radio listening: ice hockey	39	3%	74
Radio listening: NFL playoffs/Superbowl	70	5%	74
Listen to Radio: 6:00 am - 10:00 am weekday	689	46%	85
Listen to Radio: 10:00 am - 3:00 pm weekday	540	36%	94
Listen to Radio: 3:00 pm - 7:00 pm weekday	552	37%	81
Listen to Radio: 7:00 pm - midnight weekday	216	14%	90
Listen to Radio: midnight - 6:00 am weekday	77	5%	96
Listen to Radio: 6:00 am - 10:00 am weekend	502	33%	105
Listen to Radio: 10:00 am - 3:00 pm weekend	551	37%	86
Listen to Radio: 3:00 pm - 7:00 pm weekend	430	29%	86
Listen to Radio: 7:00 pm - midnight weekend	214	14%	86
Listen to Radio: midnight - 6:00 am weekend	67	4%	96

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

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



Market Potential: Travel

McGregor

Total 2008 Households: 1,504

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Member of 1 frequent flyer program	109	7%	81
Member of 2 frequent flyer programs	52	3%	70
Member of 3+ frequent flyer programs	29	2%	55
Stayed 1+ nights at hotel/motel in last 12 months	659	44%	101
Hotel/motel stayed in/12 mo: Best Western	126	8%	110
Hotel/motel stayed in/12 mo: Comfort Inn	106	7%	124
Hotel/motel stayed in/12 mo: Courtyard	42	3%	111
Hotel/motel stayed in/12 mo: Days Inn	106	7%	138
Hotel/motel stayed in/12 mo: Econo Lodge	53	4%	166
Hotel/motel stayed in/12 mo: Embassy Suites	32	2%	85
Hotel/motel stayed in/12 mo: Fairfield Inn	41	3%	119
Hotel/motel stayed in/12 mo: Hampton Inn	64	4%	106
Hotel/motel stayed in/12 mo: Hilton	32	2%	60
Hotel/motel stayed in/12 mo: Holiday Inn	87	6%	90
Hotel/motel stayed in/12 mo: Holiday Inn Express	54	4%	103
Hotel/motel stayed in/12 mo: Marriott	60	4%	80
Hotel/motel stayed in/12 mo: Motel 6	59	4%	154
Hotel/motel stayed in/12 mo: Ramada Inn	41	3%	97
Hotel/motel stayed in/12 mo: Super 8	78	5%	159
Domestic travel in last 12 months	842	56%	103
Spent on domestic vacations last 12 mo: <\$1000	232	15%	107
Spent on domestic vacations last 12 mo: \$1000-1499	100	7%	89
Spent on domestic vacations last 12 mo: \$1500-1999	64	4%	103
Spent on domestic vacations last 12 mo: \$2000-2999	44	3%	77
Spent on domestic vacations last 12 mo: \$3000+	54	4%	91
Domestic travel for business in last 12 months	97	6%	76
Domestic travel for personal reasons in last 12 mo	280	19%	117
Domestic travel for vacation/honeymoon last 12 mo	550	37%	99
Took 3+ domestic trips by plane in last 12 months	70	5%	61
Took 3+ domestic business trips by plane/12 months	34	2%	81
Took 3+ domestic non-business trips by plane/12 mo	39	3%	60
Airline used for domestic trip/12 mo: American	49	3%	75

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

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

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Airline used for domestic trip/12 mo: Continental	26	2%	61
Airline used for domestic trip/12 mo: Delta	55	4%	80
Airline used for domestic trip/12 mo: Northwest	29	2%	65
Airline used for domestic trip/12 mo: Southwest	58	4%	80
Airline used for domestic trip/12 mo: United	35	2%	63
Airline used for domestic trip/12 mo: US Airways	41	3%	87
Rented car on domestic trip in last 12 months	51	3%	61
Visited on domestic trip last 12 mo: Northeast	173	11%	94
Visited on domestic trip last 12 mo: South	423	28%	96
Visited on domestic trip last 12 mo: North Central	220	15%	101
Visited on domestic trip last 12 mo: West	282	19%	103
Went backpacking/hiking on domestic vacation/12 mo	41	3%	88
Went to beach on domestic vacation in last 12 mo	123	8%	72
Played golf on domestic vacation in last 12 months	35	2%	88
Visited National Park on domestic vacation/12 mo	99	7%	108
Foreign travel in last 3 years	256	17%	71
Spent on foreign vacations last 12 mo: <\$1000	68	5%	85
Spent on foreign vacations last 12 mo: \$1000-2999	47	3%	78
Spent on foreign vacations last 12 mo: \$3000+	39	3%	68
Foreign travel for personal reasons in last 3 yrs	43	3%	66
Foreign travel for vacation/honeymoon last 3 yrs	198	13%	74
Took foreign trip w/all-inclusive travel pkg/3 yrs	89	6%	71
Took foreign trip by cruise ship in last 3 yrs	59	4%	88
Took 3+ foreign trips by plane in last 3 yrs	39	3%	62
Took 3+ foreign vacation trips by plane last 3 yrs	34	2%	72
Airline used for foreign trip/3 yrs: American	48	3%	70
Airline used for foreign trip/3 yrs: British Air	15	1%	60
Airline used for foreign trip/3 yrs: Continental	24	2%	76
Airline used for foreign trip/3 yrs: Delta	46	3%	90
Airline used for foreign trip/3 yrs: Northwest	29	2%	90
Airline used for foreign trip/3 yrs: United	31	2%	60
Visited on foreign trip last 3 yrs: Canada	67	4%	106
Visited on foreign trip last 3 yrs: France	27	2%	64
Visited on foreign trip last 3 yrs: Germany	28	2%	83
Visited on foreign trip last 3 yrs: Hawaii	46	3%	119
Visited on foreign trip last 3 yrs: Italy	23	2%	61
Visited on foreign trip last 3 yrs: Mexico	60	4%	67
Visited on foreign trip last 3 yrs: United Kingdom	28	2%	62
Bought travelers checks in last 12 months	79	5%	73
Took cruise of more than one day in last 3 years	91	6%	77
Member of any frequent flyer program	187	12%	72

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

McGregor

Total 2008 Households: 1,504

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Cooked for fun in last 12 months	247	16%	101
Did crossword puzzle in last 12 months	264	18%	114
Flew a kite in last 12 months	58	4%	104
Did furniture refinishing in last 12 months	69	5%	101
Did indoor gardening/plant care in last 12 months	317	21%	122
Bought lottery ticket in last 12 months	577	38%	102
Bought lottery ticket in last 12 mo: Daily Drawing	66	4%	84
Bought lottery ticket in last 12 mo: Instant Game	275	18%	109
Bought lottery ticket in last 12 mo: Lotto Drawing	392	26%	103
Played lottery: <2 times in last 30 days	132	9%	70
Played lottery: 2-5 times in last 30 days	196	13%	104
Played lottery: 6+ times in last 30 days	249	17%	134
Played musical instrument in last 12 months	86	6%	75
Did painting/drawing in last 12 months	111	7%	103
Did photography in last 12 months	198	13%	107
Read book in last 12 months	668	44%	111
Surfed the Internet in last 12 months	315	21%	78
Played video game in last 12 months	182	12%	91
Did woodworking in last 12 months	125	8%	146
Member of business club	43	3%	111
Member of charitable organization	87	6%	101
Member of church board	80	5%	117
Member of fraternal order	104	7%	153
Member of religious club	114	8%	97
Member of school or college board	19	1%	65
Member of union	78	5%	94
Member of veterans club	94	6%	178
Attended adult education course in last 12 months	98	7%	98
Attended auto show in last 12 months	141	9%	115
Went to bar/night club in last 12 months	243	16%	77
Went to beach in last 12 months	318	21%	85
Attended dance performance in last 12 months	45	3%	78
Danced/went dancing in last 12 months	147	10%	80
Dined out in last 12 months	801	53%	107
Dine out < once a month	69	5%	100
Dine out once a month	80	5%	87
Dine out 2-3 times a month	207	14%	117
Dine out once a week	200	13%	113
Dine out 2+ times per week	171	11%	107

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

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

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Gambled at casino in last 12 months	269	18%	97
Gambled at casino 6+ times in last 12 months	38	3%	103
Gambled in Atlantic City in last 12 months	30	2%	57
Gambled in Las Vegas in last 12 months	60	4%	69
Attended horse races in last 12 months	39	3%	95
Attended movies in last 6 months	745	50%	81
Attended movies in last 90 days: < once a month	401	27%	89
Attended movies in last 90 days: once a month	110	7%	67
Attended movies in last 90 days: 2-3 times a month	90	6%	72
Attended movies in last 90 days: once/week or more	32	2%	64
Prefer to see movie after second week of release	310	21%	77
Went to museum in last 12 months	178	12%	85
Attended music performance in last 12 months	297	20%	82
Attended country music performance in last 12 mo	100	7%	135
Attended rock music performance in last 12 months	95	6%	63
Went to live theater in last 12 months	193	13%	86
Visited a theme park in last 12 months	264	18%	72
Visited Disneyland (CA) in last 12 months	29	2%	57
Visited Disney World (FL)/12 mo: Animal Kingdom	38	3%	89
Visited Disney World (FL)/12 mo: Epcot Center	42	3%	88
Visited Disney World (FL)/12 mo: Magic Kingdom	53	4%	94
Visited Disney World (FL)/12 mo: MGM Studios	30	2%	71
Visited any Sea World in last 12 months	53	4%	104
Visited any Six Flags in last 12 months	61	4%	59
Visited Universal Studios (FL) in last 12 months	38	3%	97
Went to zoo in last 12 months	108	7%	60
Played backgammon in last 12 months	37	2%	99
Played billiards/pool in last 12 months	113	7%	84
Played bingo in last 12 months	78	5%	121
Did birdwatching in last 12 months	128	9%	177
Played board game in last 12 months	209	14%	82
Played cards in last 12 months	329	22%	102
Played chess in last 12 months	59	4%	91
Participated in hunting with rifle	155	10%	193
Participated in hunting with shotgun	117	8%	172
Participated in ice skating	29	2%	66
Play golf once a month	15	1%	65
Play golf 2-3 times a month	25	2%	102
Participated in horseback riding	54	4%	114
Participated in jogging/running	72	5%	48
Participated in motorcycling	56	4%	121
Participated in roller blading	30	2%	61
Participated in roller skating	32	2%	92
Participated in snorkeling	22	1%	63

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

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

Product/Consumer Behavior	Expected Number of Households	Expected Percent of Households	MPI
Participated in soccer	35	2%	73
Participated in softball	57	4%	80
Participated in swimming	280	19%	102
Participated in target shooting	79	5%	167
Participated in tennis	38	3%	60
Participated in volleyball	59	4%	100
Participated in walking for exercise	532	35%	109
Participated in water skiing	25	2%	85
Participated in weight lifting	101	7%	62
Participated in yoga	31	2%	53
Spent on high end sports/rec equip/12 mo: <\$100	48	3%	120
Spent on high end sports/rec equip/12 mo: \$100-249	33	2%	90
Spent on high end sports/rec equip/12 mo: \$250+	44	3%	89
Attend sports event: auto racing (NASCAR)	77	5%	109
Attend sports event: auto racing (not NASCAR)	54	4%	92
Attend sports event: baseball game	123	8%	63
Attend sports event: basketball game (college)	67	4%	84
Attend sports event: basketball game (pro)	46	3%	51
Attend sports event: football game (college)	86	6%	80
Attend sports event: football-Mon night game (pro)	29	2%	69
Attend sports event: football-weekend game (pro)	48	3%	55
Attend sports event: golf tournament	35	2%	73
Attend sports event: ice hockey game	46	3%	64
Attend sports event: soccer game	34	2%	65
Participated in aerobics	93	6%	66
Participated in archery	47	3%	149
Participated in auto racing	38	3%	116
Participated in backpacking/hiking	132	9%	112
Participated in baseball	49	3%	60
Participated in basketball	98	7%	69
Participated in bicycling (mountain)	70	5%	113
Participated in bicycling (road)	126	8%	86
Participated in boating (power)	162	11%	163
Participated in bowling	113	8%	66
Participated in canoeing/kayaking	101	7%	150
Participated in downhill skiing	46	3%	81
Participated in fishing (fresh water)	306	20%	146
Participated in fishing (salt water)	119	8%	158
Participated in football	49	3%	66
Participated in Frisbee	52	3%	75
Participated in golf	140	9%	80
Play golf < once a month	53	3%	81

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.