

Marshall Retail Trade Overview

Total Taxable and Gross Retail Sales

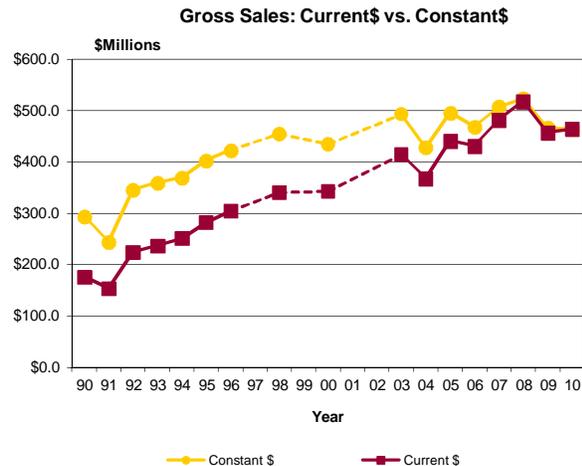
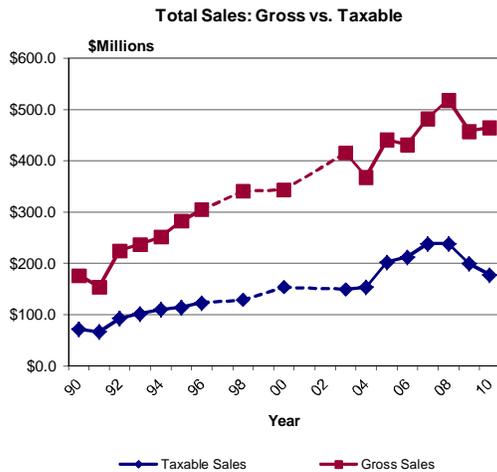
The table below presents gross and taxable retail and services sales for Marshall from 1990 through 2010. Without inflation adjustments, taxable sales in Marshall increased 19 percent from 2003 to 2010, while the number of firms fell 2.2 percent. Statewide, taxable sales increased 6.1 percent over the same time period and the number of firms rose 8.2 percent. The per capita sales and pull factor data in this table are based on taxable sales, the more verified sales measure.

The table also presents sales data in constant 2010 dollars. These figures have been adjusted for inflation to reflect their value in 2010. For example, in 1990, taxable sales in Marshall totaled \$71.91 million, an amount worth \$119.85 million in 2010 dollars. In constant dollars, gross sales fell 5.8 percent between 2003 and 2010. Constant dollar taxable sales decreased 0 percent over the same time period.

| Year | Estimated Population | Current Dollars | | Constant 2010 Dollars | | Number of Firms | Per Capita Sales | Pull Factor |
|------------------------|----------------------|---------------------------|----------------------------|---------------------------|----------------------------|-----------------|------------------|-------------|
| | | Gross Sales* (\$millions) | Taxable Sales (\$millions) | Gross Sales* (\$millions) | Taxable Sales (\$millions) | | | |
| 1990 | 12,061 | \$176.49 | \$71.91 | \$294.15 | \$119.85 | 385 | \$5,962 | 1.36 |
| 1991 | 12,041 | \$154.34 | \$66.85 | \$244.99 | \$106.11 | 378 | \$5,552 | 1.27 |
| 1992 | 12,007 | \$225.04 | \$93.29 | \$346.21 | \$143.52 | 397 | \$7,769 | 1.61 |
| 1993 | 12,173 | \$237.53 | \$102.15 | \$359.89 | \$154.77 | 400 | \$8,391 | 1.66 |
| 1994 | 12,391 | \$251.64 | \$110.29 | \$370.06 | \$162.20 | 398 | \$8,901 | 1.63 |
| 1995 | 12,346 | \$282.74 | \$115.05 | \$403.92 | \$164.36 | 386 | \$9,319 | 1.63 |
| 1996 | 12,160 | \$304.97 | \$123.19 | \$423.56 | \$171.10 | 394 | \$10,131 | 1.51 |
| 1997 | 12,179 | NA | NA | NA | NA | NA | \$0 | NA |
| 1998 | 12,253 | \$340.89 | \$128.83 | \$454.52 | \$171.77 | 411 | \$10,514 | 1.51 |
| 1999 | 12,218 | NA | NA | NA | NA | NA | \$0 | NA |
| 2000 | 12,735 | \$343.33 | \$153.72 | \$434.59 | \$194.58 | 389 | \$12,071 | 1.59 |
| 2001 | 12,763 | NA | NA | NA | NA | NA | \$0 | NA |
| 2002 | 12,558 | NA | NA | NA | NA | NA | \$0 | NA |
| 2003 | 12,545 | \$414.72 | \$149.45 | \$493.72 | \$177.91 | 368 | \$11,913 | 1.33 |
| 2004 | 12,409 | \$368.96 | \$153.96 | \$429.02 | \$179.02 | 359 | \$12,407 | 1.34 |
| 2005 | 12,432 | \$441.75 | \$202.82 | \$496.35 | \$227.89 | 359 | \$16,314 | 1.71 |
| 2006 | 12,464 | \$431.78 | \$212.88 | \$469.33 | \$231.39 | 342 | \$17,080 | 1.78 |
| 2007 | 12,569 | \$483.02 | \$238.69 | \$508.44 | \$251.25 | 348 | \$18,991 | 1.95 |
| 2008 | 12,728 | \$519.11 | \$238.57 | \$524.35 | \$240.98 | 378 | \$18,744 | 1.96 |
| 2009 | 12,754 | \$458.26 | \$199.63 | \$467.61 | \$203.71 | 356 | \$15,653 | 1.75 |
| 2010 | 13,680 | \$464.85 | \$177.83 | \$464.85 | \$177.83 | 360 | \$13,000 | 1.44 |
| 7 yr Change '03 to '10 | | | | | | | | |
| | 9.0% | 12.1% | 19.0% | -5.8% | 0.0% | -2.2% | 9.1% | 7.9% |
| 3 yr Change '07 to '10 | | | | | | | | |
| | 8.8% | -3.8% | -25.5% | -8.6% | -29.2% | 3.4% | -31.5% | -26.2% |

*Gross sales figures are self-reported by firms and not audited by the Dept. of Revenue for accuracy.

Marshall: Total Retail Sales

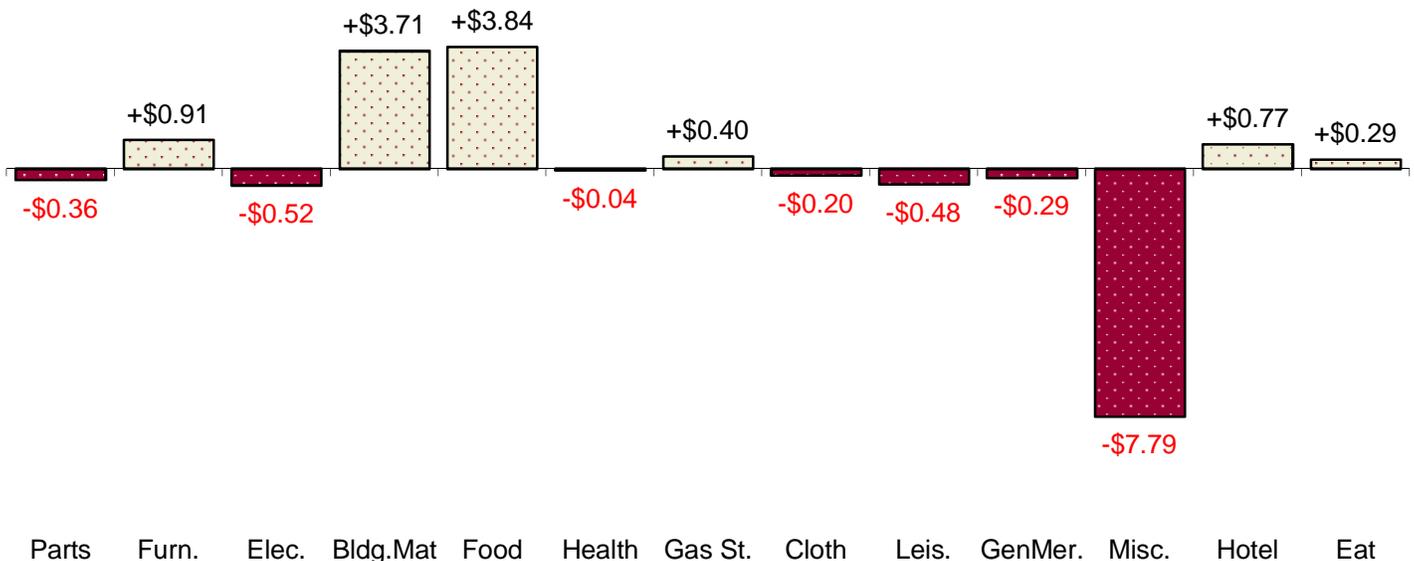


Marshall Components of Change, 2007 to 2010

| Category | Taxable Sales 2007 | Taxable Sales 2010 | Dollar Change | Percent Change |
|--|-----------------------|-----------------------|----------------------|-------------------|
| Vehicles & Parts | \$9,056,594 | \$8,698,938 | -\$357,656 | -3.95% |
| Furniture Stores | \$4,789,951 | \$5,695,220 | +\$905,269 | +18.90% |
| Electronics | \$3,392,264 | \$2,874,197 | -\$518,067 | -15.27% |
| Building Materials | \$22,062,746 | \$25,770,031 | +\$3,707,285 | +16.80% |
| Food, Groceries | \$12,226,638 | \$16,066,273 | +\$3,839,635 | +31.40% |
| Health, Personal Stores | \$492,764 | \$450,720 | -\$42,044 | -8.53% |
| Gasoline Stations | \$2,311,322 | \$2,706,801 | +\$395,479 | +17.11% |
| Apparel | \$1,862,084 | \$1,659,097 | -\$202,987 | -10.90% |
| Leisure Goods | \$3,409,743 | \$2,927,515 | -\$482,228 | -14.14% |
| General Merchandise Stores | \$45,127,657 | \$44,834,515 | -\$293,142 | -0.65% |
| Miscellaneous Retail | \$9,216,985 | \$1,423,915 | -\$7,793,070 | -84.55% |
| Accommodations | \$4,749,027 | \$5,517,059 | +\$768,032 | +16.17% |
| Eating & Drinking | +\$24,096,693 | +\$24,386,783 | +\$290,090 | +1.20% |
| Total Retail and Services Sales | \$238,691,733 | \$177,833,250 | -\$60,858,483 | -25.50% |

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 to 2010



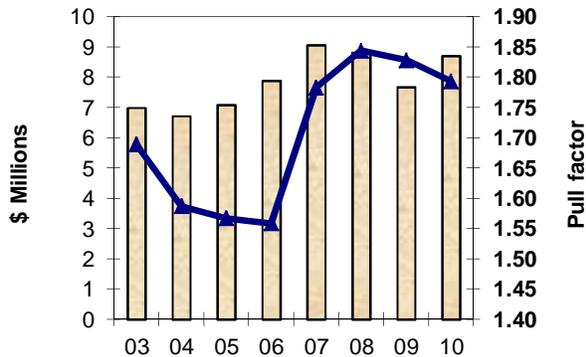
Recent Trends By Merchandise Category

Marshall

This page looks at several merchandise categories to chart the five-year trend in taxable sales and pull factor.



Vehicles & Parts

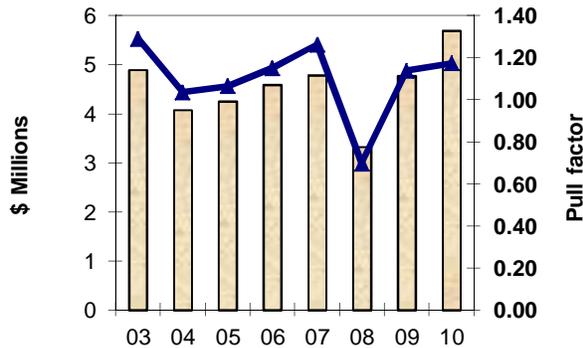


4.4% of Marshall's taxable sales in 2010

Sales per capita are \$636

Stores in the Motor Vehicle and Parts Dealers subsector retail motor vehicles and parts from fixed point-of-sale locations. This can include automobiles, campers, RV's, boats, out-board motors, sailboats, snowmobiles, motorcycles, and all terrain vehicles.

Furniture

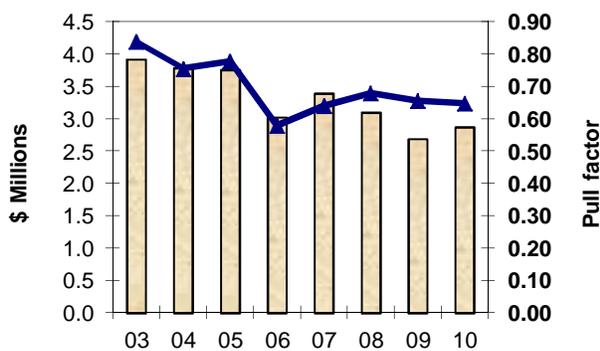


2.9% of Marshall's taxable sales in 2010

Sales per capita are \$416

Stores in the Furniture and Home Furnishings subsector retail new furniture and home furnishings from fixed point-of-sale locations. This can include bed stores, office furniture, carpet stores, window treatments, lamps, framing shops, linens, and kitchenware.

Electronics



1.4% of Marshall's taxable sales in 2010

Sales per capita are \$210

Stores in the Electronics and Appliance subsector retail new electronics and appliances from point-of-sale locations. This can include household appliances, sewing machines, vacuum cleaners, computers, cameras, telephones, cell phones, televisions, and radios.

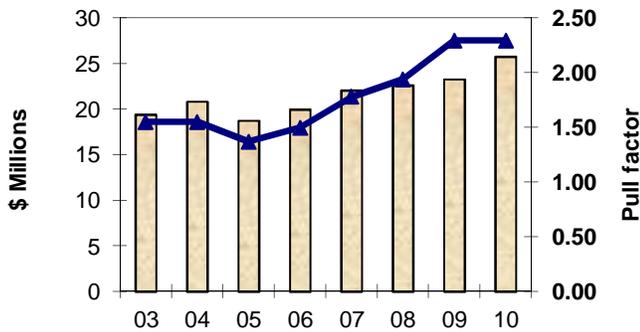
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Building Materials

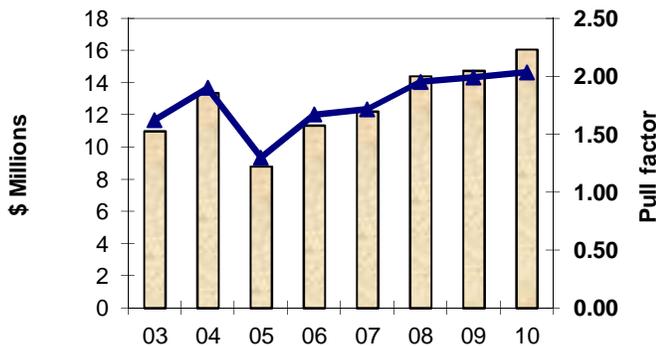


12.9% of Marshall's taxable sales in 2010

Sales per capita are \$1884

Stores in the Building Material and Garden Equipment and Supplies Dealers subsector retail new building material and garden equipment and supplies. This includes home improvement centers and stores that sell paint, wallpaper, ceramic tile, fencing, windows, roofing, siding, hardware, and plumbing.

Groceries & Beverage Stores

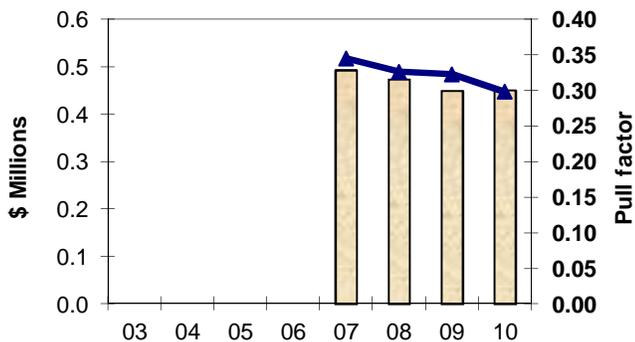


8.0% of Marshall's taxable sales in 2010

Sales per capita are \$1174

Stores in the Food and Beverage Stores subsector usually retail food and beverages merchandise from fixed point-of-sale locations. This can include grocery stores, liquor stores, bakeries, candy shops, butcher stores, meat markets, and produce markets.

Health, Pharmacy, Optical



0.2% of Marshall's taxable sales in 2010

Sales per capita are \$33

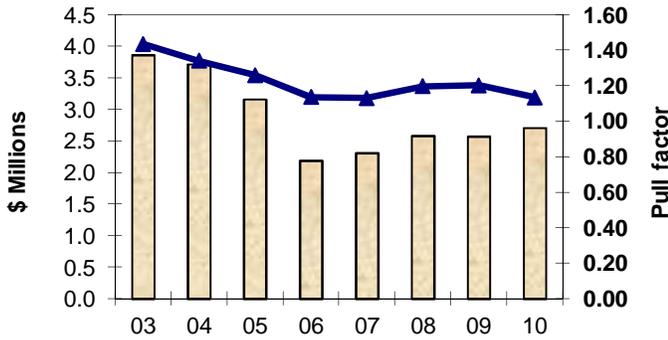
Stores in the Health and Personal Care Stores subsector retail health and personal care merchandise from fixed point-of-sale locations. This includes drug stores, health supplement stores, hearing aid stores, optical goods stores, cosmetic stores, medical supply stores,

Recent Trends By Merchandise Category

Marshall



Gas/Convenience Stores



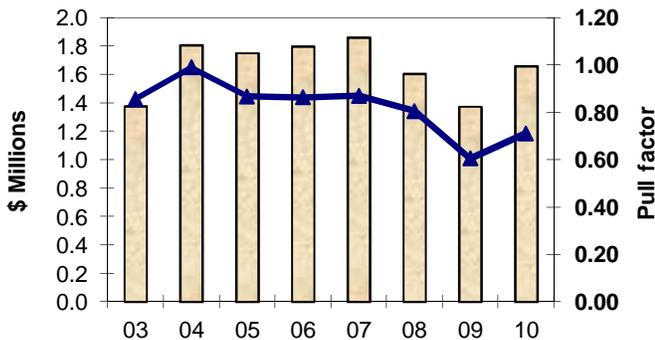
This page looks at several merchandise categories to chart the five-year trend in taxable sales and pull factor.

1.4% of Marshall's taxable sales in 2010

Sales per capita are \$198

Stores in the Gasoline Stations subsector group establishments retailing automotive fuels (e.g., gasoline, diesel fuel, gasohol) and automotive oils and retailing these products in combination with convenience store items. This includes truck stops, C stores, marine service stations, and ordinary gas stations that sell automotive supplies.

Clothing & Accessories

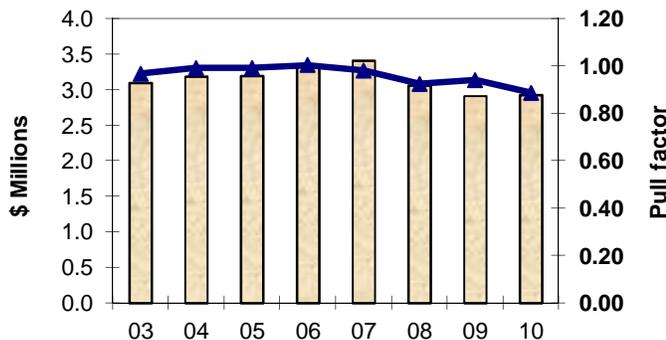


0.8% of Marshall's taxable sales in 2010

Sales per capita are \$121

Stores in the Clothing and Clothing Accessories Stores subsector retailing new clothing and clothing accessories. Besides clothing stores it includes shops that sell jewelry, shoes, luggage, handbags, wigs, ties, bridal gowns, furs, uniforms, T-shirts, baby clothing, swimsuits, and lingerie.

Sporting Goods/Hobbies



1.5% of Marshall's taxable sales in 2010

Sales per capita are \$214

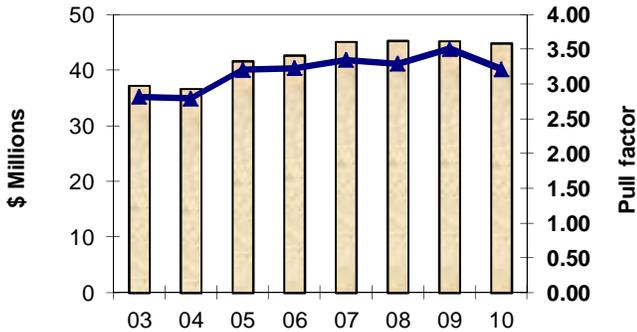
Stores in the Sporting Goods, Hobby, Book, and Music Stores subsector are engaged in retailing and providing expertise on use of sporting equipment or other specific leisure activities, such as needlework and musical instruments. Newstands also fit in this subsector.

Recent Trends By Merchandise Category

Marshall



General Merchandise Stores



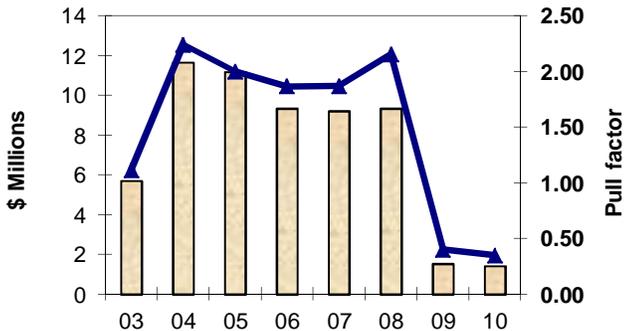
This page looks at several merchandise categories to chart the five-year trend in taxable sales and pull factor.

22.5% of Marshall's taxable sales in 2010

Sales per capita are \$3277

Stores in the General Merchandise subsector retail new general merchandise and are unique in that they have the equipment and staff capable of retailing a large variety of goods from a single location. This includes department stores, superstores, dollar stores, and variety stores.

Miscellaneous & Previously Unreported

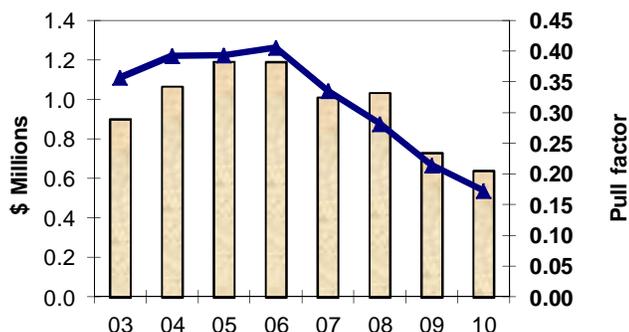


0.7% of Marshall's taxable sales in 2010

Sales per capita are \$104

Establishments such as florists, used merchandise stores, and pet and pet supply stores as well as other store retailers. **Also, if a community had fewer than 4 stores in a previous sector, it was included in this category. This may cause unrealistically high Pull Factors.**

Non-Store Retail



0.4% of Marshall's taxable sales in 2010

Sales per capita are \$47

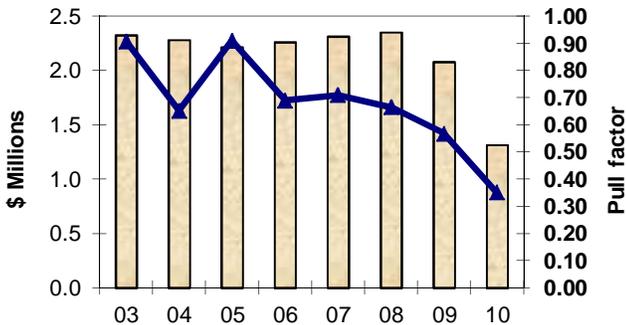
Mail-order houses, vending machine operators, home delivery sales, door-to-door sales, party plan sales, electronic shopping, and sales through portable stands (except food). Establishments engage in direct sale (nonstore) of products, such as home heating oil dealers and newspaper delivery are included in this subsector.

Recent Trends By Merchandise Category

Marshall



Amusement

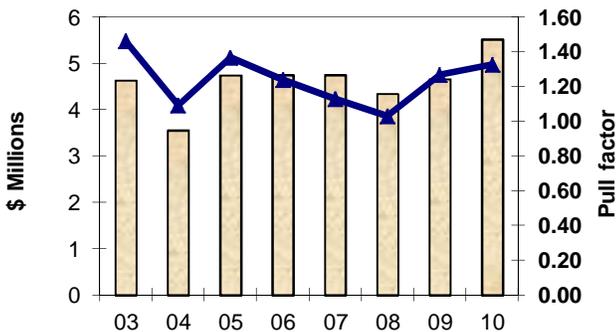


0.7% of Marshall's taxable sales in 2010

Pull Factor 1.00 is \$274 sales per capita

Establishments include casinos, bowling lanes, water parks, amusement parks, arcades, bingo halls, golf courses, ski slopes, marinas, dance or fitness centers, recreational clubs, ice rinks, swimming pools, roller rinks, and the like.

Accommodations

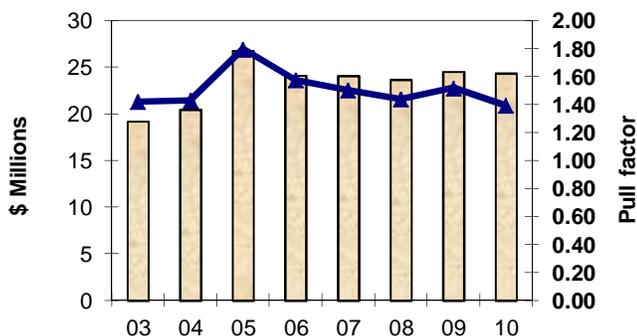


2.8% of Marshall's taxable sales in 2010

Sales per capita are \$341

These businesses provide provide lodging or short-term accommodations for travelers, vacationers, and others. Included are hotels, motels, lodges, bed & breakfasts, campgrounds, fraternities, boarding houses, and dormitories.

Eating & Drinking



12.2% of Marshall's taxable sales in 2010

Sales per capita are \$1795

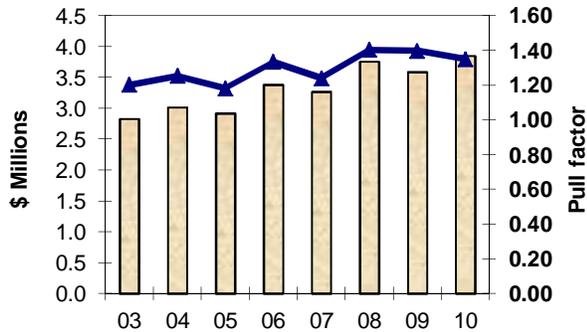
These businesses sell food at full-service or limited-service establishments. It includes cafeterias, bagel shops, ice cream parlors, snack bars, food service contractors, caterers, lunch wagons, and street vendors. It also includes bars, taverns, and nightclubs.

Recent Trends By Merchandise Category

Marshall



Repair Businesses



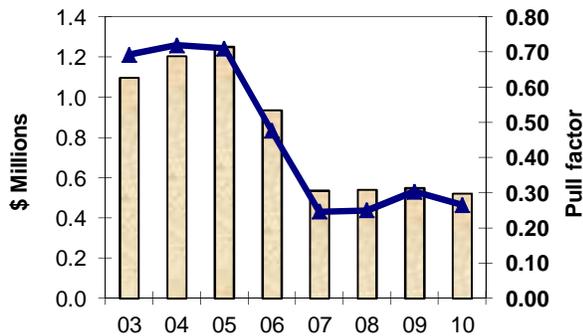
This page looks at several categories to chart the five-year trend in taxable sales and pull factor.

1.9% of Marshall's taxable sales in 2010

Pull Factor 1.00 is \$209 sales per capita

*The Repair and Maintenance subsector restore machinery, equipment, and other products to working order. It does **not** include plumbers & electricitians. It does include repairs to autos, cameras, radio, television, computers, copiers, appliances, lawn mowers, specialized equipment, small engines, furnitures, shoes, guns, etc.*

Personal Service Providers



0.3% of Marshall's taxable sales in 2010

Pull Factor 1.00 is \$144 sales per capita

Services performed include: personal care services; barber shops & beauty parlors; death care services; laundry and drycleaning services; and a wide range of other personal services, such as pet care (except veterinary) services, photofinishing services, temporary parking services, and dating services.

Historical Trends By Merchandise Category Marshall

The following tables and charts depict pull factors in Marshall from 1990 to 2000* by merchandise category. Pull factors are a measure of trade area size that provide a useful measure of changes over time because they account for changes in population and state-wide industry trends.

Category Descriptions

Building Materials: Includes retail establishments primarily engaged in selling lumber and other building materials; paint, glass, and wallpaper; hardware; nursery stock; and lawn and garden supplies.

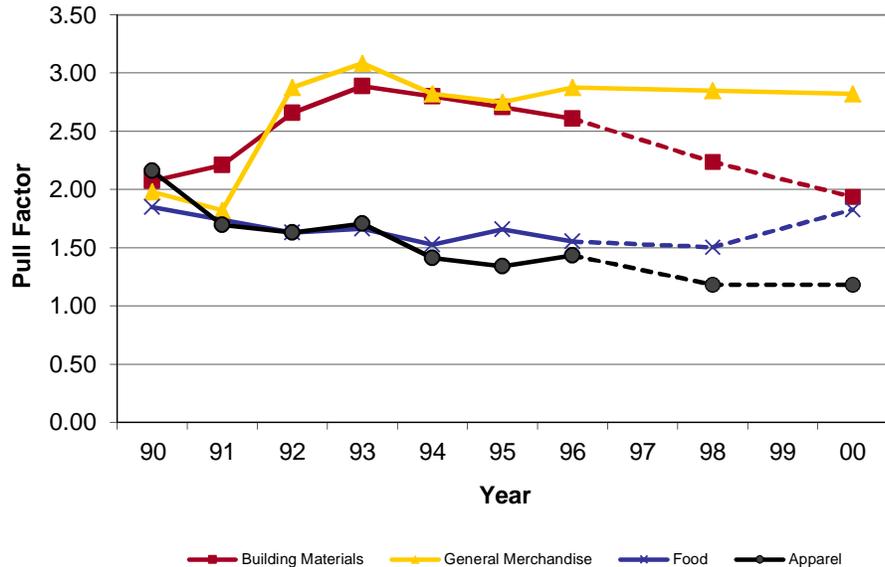
General Merchandise: Includes retail stores which sell a number of lines of merchandise, such as dry goods, apparel and accessories, furniture and home furnishings, small wares, hardware, and food. The stores included in this group are known as department stores, variety stores, general merchandise stores, catalog showrooms, warehouse clubs, and general stores.

Food: This group is comprised of retail stores primarily engaged in selling food for home preparation and consumption.

Apparel: Retail stores primarily engaged in selling clothing of all kinds and related articles for personal wear and adornment. Not included are establishments which meet the criteria for Department Stores even though most of their receipts are from the sale of apparel and apparel accessories.

*Due to a change in how firms are categorized beginning with fiscal year 2003, only data through fiscal year 2000 are presented in this section.

Pull Factors by Merchandise Category (1 of 3)



**Pull Factors by Merchandise Category
Marshall, 1990-2000**

| Year | Building Materials | General Merchandise | Food | Apparel |
|------|--------------------|---------------------|------|---------|
| 1990 | 2.07 | 1.98 | 1.85 | 2.16 |
| 1991 | 2.21 | 1.82 | NA | 1.69 |
| 1992 | 2.66 | 2.88 | 1.63 | 1.63 |
| 1993 | 2.89 | 3.08 | 1.66 | 1.70 |
| 1994 | 2.80 | 2.82 | 1.53 | 1.41 |
| 1995 | 2.71 | 2.75 | 1.66 | 1.34 |
| 1996 | 2.61 | 2.87 | 1.56 | 1.43 |
| 1997 | NA | NA | NA | NA |
| 1998 | 2.24 | 2.85 | 1.50 | 1.18 |
| 1999 | NA | NA | NA | NA |
| 2000 | 1.93 | 2.82 | 1.82 | 1.18 |

% Change, '90 to '00 -6.80% 42.49% -1.17% -45.17%

% Change, '98 to '00 -13.53% -0.93% 21.28% 0.06%

These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide, all cities are compared on the same basis.

Historical Trends By Merchandise Category Marshall

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Category Descriptions

Furniture: This group includes retail stores selling goods used for furnishing the home such as furniture, floor coverings, draperies, glass and chinaware, domestic stoves, refrigerators, and other household electric and gas appliances.

Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

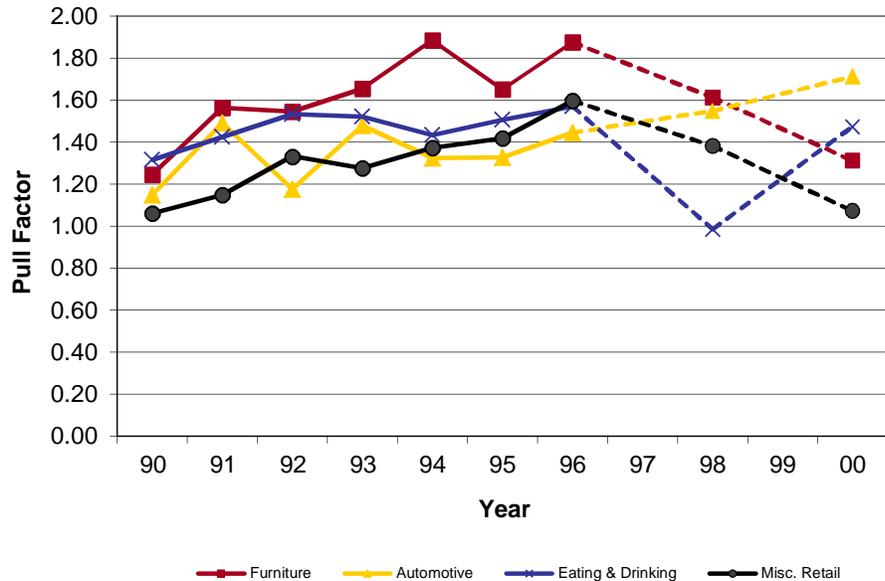
Eating & Drinking: This major group includes retail establishments engaged in selling prepared food and drinks for consumption on the premises. Also included are caterers which serve prepared food other than at the place of business and lunch counters and refreshment stands selling prepared foods and drinks for immediate consumption.

Miscellaneous Retail: This category includes retail establishments not elsewhere classified. These establishments fall into the following categories: liquor stores; used merchandise stores; miscellaneous shopping goods stores; nonstore retailers, fuel dealers, florists, cigar stores and stands, news dealers and newsstands, and miscellaneous retail stores not elsewhere classified.

*Due to a change in how firms are categorized beginning with fiscal year 2003, only data through fiscal year 2000 are presented in this section.

12/2/2012

Pull Factors by Merchandise Category (2 of 3)



Pull Factors by Merchandise Category Marshall, 1990-2000

| Year | Furniture | Automotive | Eating & Drinking | Misc. Retail |
|----------------------|-----------|------------|-------------------|--------------|
| 1990 | 1.25 | 1.15 | 1.32 | 1.06 |
| 1991 | 1.57 | 1.49 | 1.42 | 1.15 |
| 1992 | 1.55 | 1.18 | 1.54 | 1.33 |
| 1993 | 1.66 | 1.48 | 1.52 | 1.28 |
| 1994 | 1.89 | 1.32 | 1.44 | 1.37 |
| 1995 | 1.65 | 1.33 | 1.51 | 1.42 |
| 1996 | 1.88 | 1.45 | 1.57 | 1.60 |
| 1997 | NA | NA | NA | NA |
| 1998 | 1.61 | 1.55 | 0.99 | 1.38 |
| 1999 | NA | NA | NA | NA |
| 2000 | 1.31 | 1.71 | 1.47 | 1.07 |
| % Change, '90 to '00 | 5.22% | 48.93% | 12.05% | 1.32% |
| % Change, '98 to '00 | -18.61% | 10.67% | 49.67% | -22.24% |

These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide, all cities are compared on the same basis.

Historical Trends By Merchandise Category Marshall

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Category Descriptions

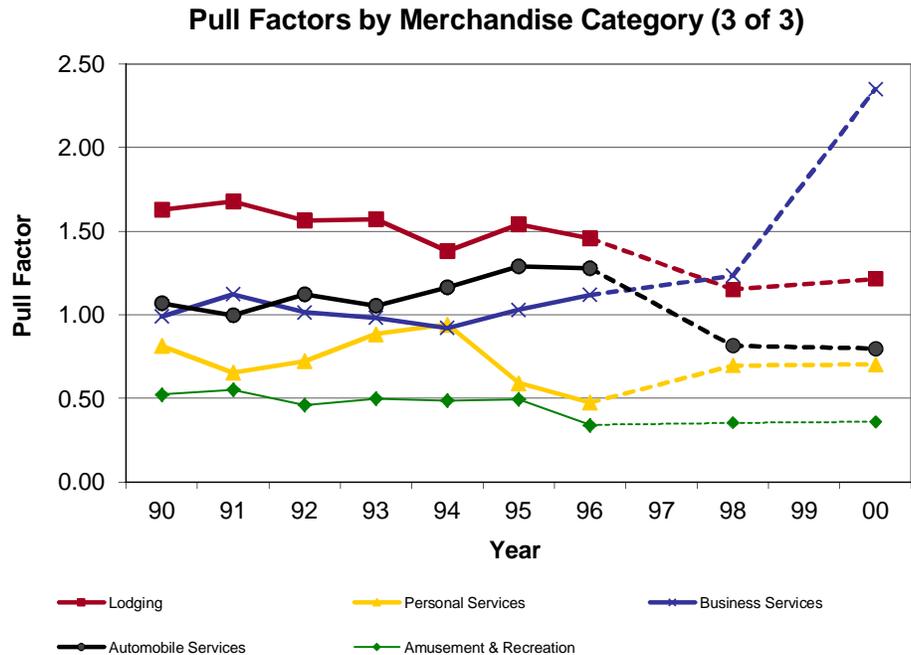
Lodging: Includes establishments engaged in providing lodging, or lodging and meals, and camping facilities.

Personal Services: includes establishments primarily engaged in providing services generally to individuals, such as barber and beauty shops, drycleaning plants, laundries, and photographic studios.

Business Services: Includes establishments primarily engaged in providing services, not elsewhere classified, to business establishments on a contract or fee basis.

Automobile Services: Includes establishments primarily engaged in automotive repair, rental, leasing, parking, and other services.

Amusement and Recreation: This group includes establishments primarily engaged in providing amusement, recreation, or entertainment services that are not elsewhere classified.



**Pull Factors by Merchandise Category
Marshall, 1990-2000**

| Year | Lodging | Personal Services | Business Services | Automobile Services | Amusement & Recreation |
|----------------------|---------|-------------------|-------------------|---------------------|------------------------|
| 1990 | 1.63 | 0.81 | 0.99 | 1.07 | 0.52 |
| 1991 | 1.68 | 0.65 | 1.12 | 1.00 | 0.55 |
| 1992 | 1.56 | 0.72 | 1.01 | 1.12 | 0.46 |
| 1993 | 1.57 | 0.88 | 0.98 | 1.05 | 0.50 |
| 1994 | 1.38 | 0.94 | 0.92 | 1.16 | 0.49 |
| 1995 | 1.54 | 0.59 | 1.03 | 1.29 | 0.49 |
| 1996 | 1.46 | 0.47 | 1.12 | 1.28 | 0.34 |
| 1997 | NA | NA | NA | NA | NA |
| 1998 | 1.15 | 0.70 | 1.23 | 0.81 | 0.35 |
| 1999 | NA | NA | NA | NA | NA |
| 2000 | 1.21 | 0.70 | 2.35 | 0.80 | 0.36 |
| % Change, '90 to '00 | -25.41% | -13.68% | 137.38% | -25.48% | -31.16% |
| % Change, '98 to '00 | 5.53% | 0.73% | 90.61% | -2.23% | 1.61% |

*Due to a change in how firms are categorized beginning with fiscal year 2003, only data through fiscal year 2000 are presented in this section.

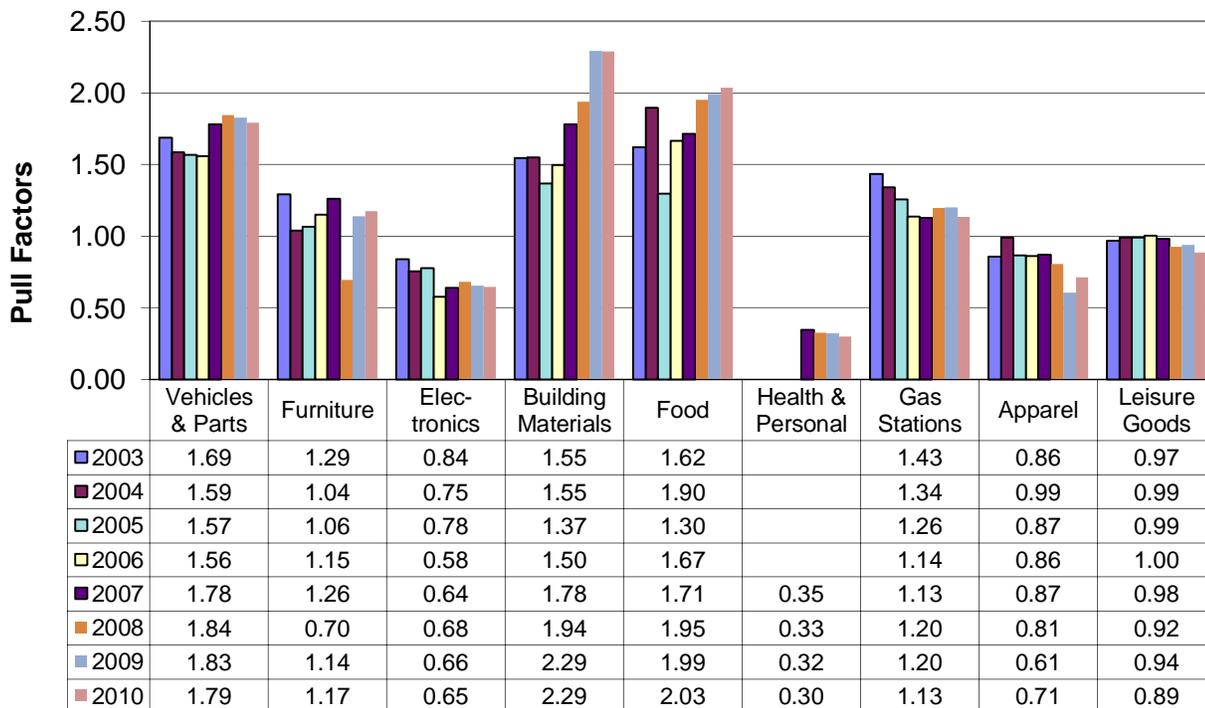
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The following tables and charts depict pull factors in Marshall from 2003 to 2010* by merchandise category. Pull factors are a measure of trade area size that provide a useful measure of changes over time because they account for changes in population and state-wide industry trends.

Pull Factor by NAICS Merchandise Category (1 of 2)



NAICS Category Descriptions

Motor Vehicles & Parts: Establishments that sell new & used autos, boats, motorcycles, golf carts, RV's, campers, trailers, tires, and parts.

Furniture: Stores that sell furniture, beds, carpeting, window coverings, lamps, china, kitchenware, & woodburning stoves.

Electronics: Establishments primarily engaged in retailing household-type appliances, sewing machines, cameras, computers, and other electronic goods.

Building Materials: Establishments that sell lumber, hardware, paint, wallpaper, tile, hardwood floors, roofing, fencing, ceiling fans, lawn equipment, garden centers, and feed stores.

Food: Grocery stores, deli's, bakery, & butcher shops that sell food to be prepared at home. Liquor stores.

Health & Personal: Pharmacies, food supplements, vision supplies, cosmetics, & hearing aid stores.

Gas Stations: Retailers that sell fuel along with convenience store items.

Apparel: New clothing and accessories, jewelry, shoes, bridal shops, clock shops, and luggage stores.

Leisure Goods: Sporting goods, books, music, hobby stores, fabric shops, and toy stores.

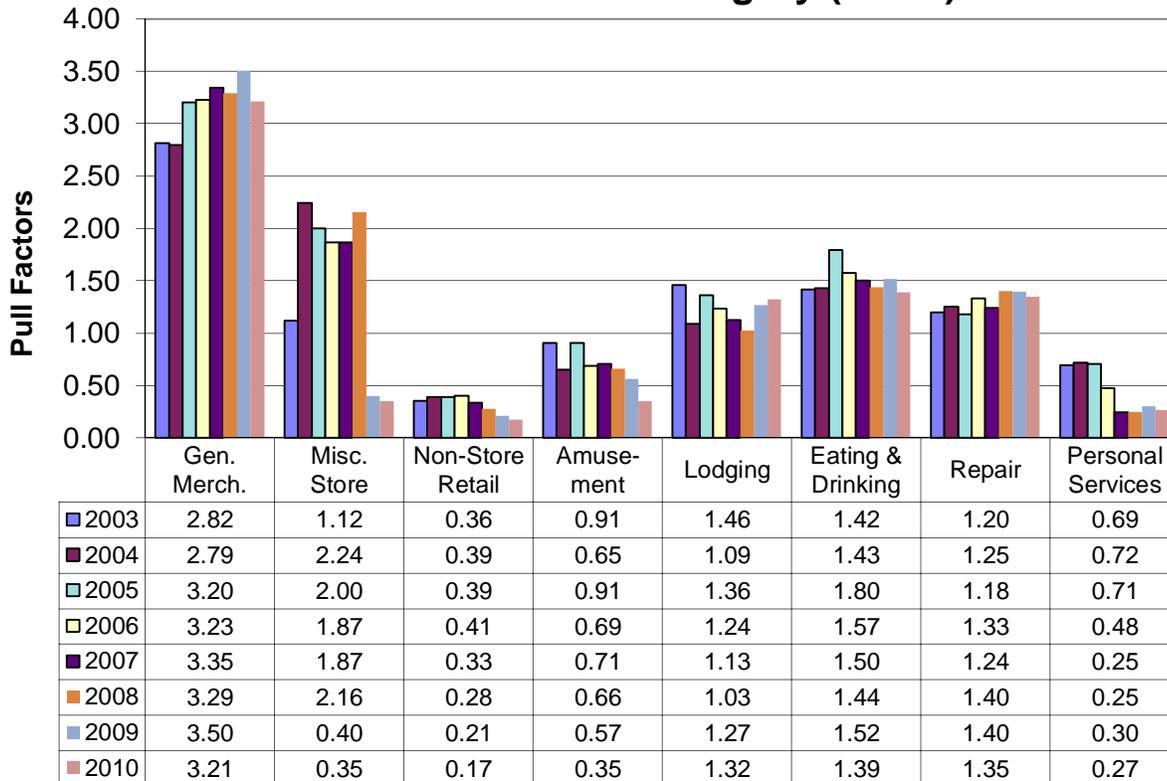
*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Recent Trends By Merchandise Category

Marshall

The following tables and charts depict pull factors in Marshall from 2003 to 2010* by merchandise category. Pull factors are a measure of trade area size that provide a useful measure of changes over time because they account for changes in population and state-wide industry trends.

**Pull Factor by NAICS
Merchandise Category (2 of 2)**



NAICS Category Descriptions

General Merchandise: Establishments that sell a mixed line of goods. Examples are department stores, supercenters, and dollar stores.

Miscellaneous Store Retailers: Stores not covered in other categories such as florists, office supplies, pets, antiques, tobacco, art, used merchandise, and trophies. (see Suppressed Data in Cautions section)

Non-Store Retail: Retailers that do not use stores. This includes mail order, internet selling, bazaars, vending machines, fuel oil dealers, firewood dealers, door-to-door sales, and produce stands.

Amusement: Establishments such as golf courses, bowling lanes, marinas, amusement parks, water parks, shooting ranges, pool halls, horseback riding, ballrooms, health club facilities, ski hills, and casinos.

Lodging: Seasonal resorts, hotels, boarding houses, bed & breakfast, campgrounds, RV parks.

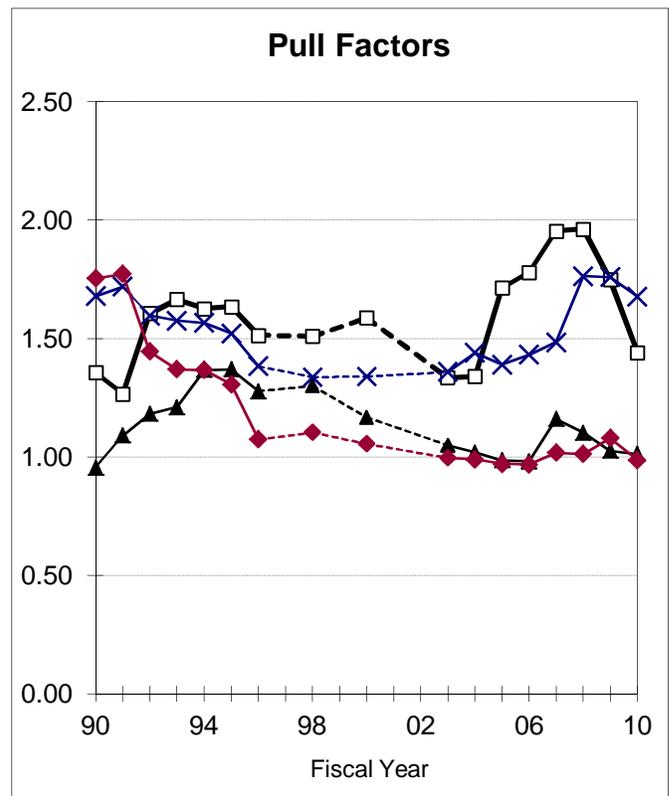
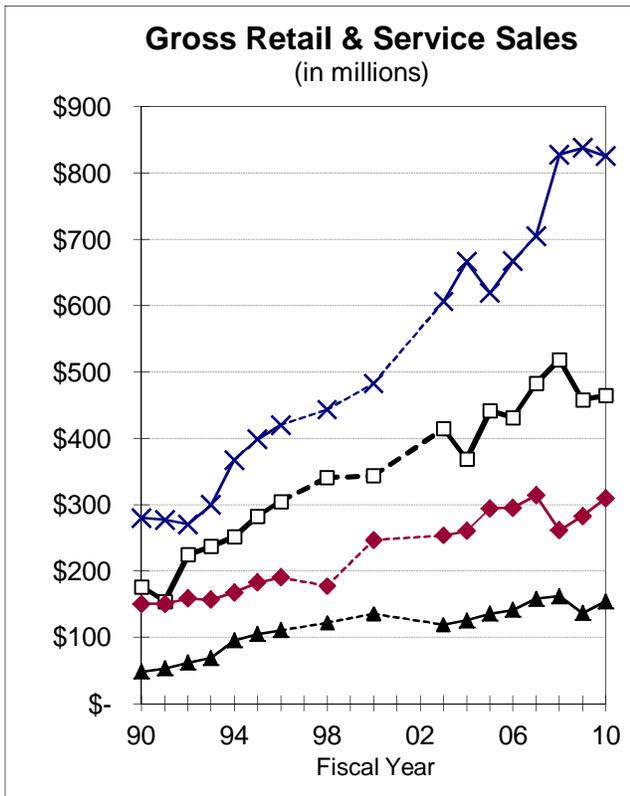
Eating & Drinking: Restaurants, donut shops, coffee house, cafeteria, caterers, taverns, and nightclubs,

Repair: Businesses that return items to working order. Examples: cars, lawnmowers, small engines, knives, shoes, computers, furniture, and appliances.

Personal Services: Barbers, beauty salons, tanning facilities, funeral homes, laundromats, dry cleaners, pet groomers, kennels, and photo finishing.

*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Comparison with Competing Centers Marshall



□ Marshall
× Willmar

▲ Redwood Falls
◆ Worthington

Information about competing trade centers can provide a useful means of comparison when assessing a community's retail trade sector. Comparison towns were selected based on geographic proximity, relative size and availability of data. Some caution is warranted in the interpretation of these comparisons however, since retail sales data is provided for only a limited number of towns and cities.

Comparison with Competing Trade Centers, 2010

| Town | Population | Gross Sales (\$millions) | Taxable Sales (\$millions) | Number of Firms | Per Capita Taxable Sales | Pull Factor (Taxable Sales) |
|---------------|------------|--------------------------|----------------------------|-----------------|--------------------------|-----------------------------|
| Marshall | 13,680 | \$464.85 | \$177.83 | 360 | \$13,000 | 1.44 |
| Redwood Falls | 5,254 | \$154.51 | \$47.98 | 155 | \$9,132 | 1.01 |
| Willmar | 19,610 | \$825.21 | \$296.77 | 503 | \$15,134 | 1.68 |
| Worthington | 12,764 | \$309.98 | \$113.63 | 296 | \$8,903 | 0.99 |

Trade Area Analysis of Retail Sales

Marshall

The following tables provide information on retail sales by merchandise category. "Expected sales" is a standard to which actual performance is compared. In calculating expected sales, population, income, and typical "pulling power" characteristics are taken into account. Expected sales can be used as a guideline or "par value" in analyzing retail strength.

Deviations from these norms can be analyzed to first judge whether they should be considered relevant. If the differences appear to be significant (whether in dollar amounts or relatively with percentages), additional consideration is merited. Categories with undesirable performance may be further examined for potential corrective action. It is also important to determine whether or not the situation is relatively uncontrollable due to external or extenuating circumstances. In cases of favorable differences from expectations, the positive aspects should be identified and built upon.

Trade Area Analysis by Merchandise Category, 2010

| Merchandise Group | <u>Variance Between Actual & Expected</u> | | | | Trade Area Pop. Gain or Loss | Number of Firms | Percent of Total Sales |
|---|---|---------------------------------|--------------------------|---------------------|------------------------------------|--------------------|------------------------------|
| | Expected Sales (\$millions) | Actual Sales (\$millions) | In Dollars (millions) | As % of Expected | | | |
| Vehicles & Parts | \$8.49 | \$8.70 | +\$0.21 | +2.5% | 341 | 11 | 4.4% |
| Furniture Stores | \$2.43 | \$5.70 | +\$3.26 | +134.3% | 18,374 | 10 | 2.9% |
| Electronics | \$2.98 | \$2.87 | -\$0.11 | -3.6% | -492 | 7 | 1.4% |
| Building Materials | \$15.59 | \$25.77 | +\$10.18 | +65.3% | 8,934 | 11 | 12.9% |
| Food, Groceries | \$8.08 | \$16.07 | +\$7.99 | +99.0% | 13,538 | 13 | 8.0% |
| Health, Personal Stores | \$2.03 | \$0.45 | -\$1.58 | -77.8% | -10,641 | 8 | 0.2% |
| Gasoline Stations | \$2.79 | \$2.71 | -\$0.09 | -3.1% | -423 | 7 | 1.4% |
| Apparel | \$0.88 | \$1.66 | +\$0.78 | +88.4% | 12,095 | 11 | 0.8% |
| Leisure Goods | \$1.38 | \$2.93 | +\$1.55 | +112.7% | 15,419 | 16 | 1.5% |
| General Merchandise Stores | \$40.43 | \$44.83 | +\$4.40 | +10.9% | 1,489 | 7 | 22.5% |
| Miscellaneous Retail | \$10.38 | \$1.42 | -\$8.96 | -86.3% | -11,804 | 33 | 0.7% |
| Amusement & Recreation | \$2.35 | \$1.31 | -\$1.04 | -44.1% | -6,035 | 5 | 0.7% |
| Accommodations | \$5.13 | \$5.52 | +\$0.39 | +7.6% | 1,035 | 10 | 2.8% |
| Eating & Drinking Places | \$14.93 | \$24.39 | +\$9.46 | +63.4% | 8,667 | 34 | 12.2% |
| Repair, Maintenance | \$2.73 | \$3.85 | +\$1.12 | +41.0% | 5,606 | 28 | 1.9% |
| Personal Services, Laundry | \$0.60 | \$0.52 | -\$0.08 | -12.8% | -1,746 | 42 | 0.3% |
| Total Taxable Retail & Service | \$93.07 | \$199.63 | +\$106.56 | +114.5% | 15,663 | 360 | 100.0% |

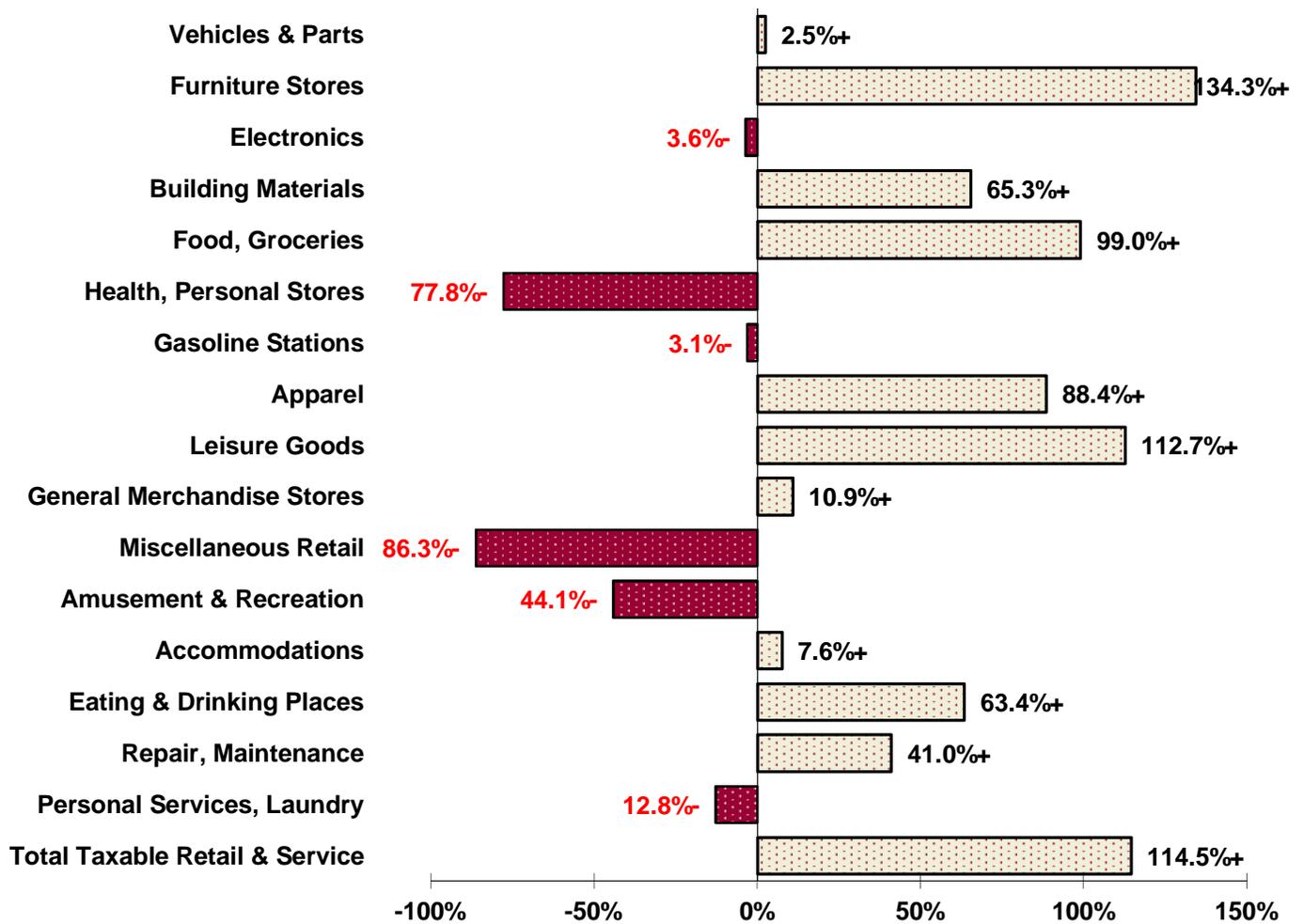
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of Marshall Retail Trade

The chart below depicts the percentage amount Marshall's actual sales were above or below expected sales in 2010 by merchandise group. Of the 16 merchandise categories with reported data, sales in 10 of the categories were above what would be expected based on the performance in similar-sized Minnesota towns. The strongest merchandise group by this standard is the Furniture Stores category, which has a 134.3 percent surplus. Overall, Marshall had a retail sales surplus of 114.5 percent in 2010.

It is important to note that variations in a town's relative retail performance may occur for a variety of reasons, some of which are beyond the control of local policy. Proximity to larger population centers, management, marketing, and transportation patterns are just a few factors that can cause the retail sales of a particular city to deviate substantially from expected sales. It is important that decision-makers consider these influences when constructing policies, plans, or projects.

Percentage Above or Below Expected Sales, 2010



Comparison of Pull Factors by Merchandise Category

2010 Index of "Pulling Power" Towns with Populations between 10,200 & 15,400 (Range: Population of Marshall +/- ~ 20%.) (25 Cities)

Pull Factors

| Town | Population | Vehicles, Parts | Furniture Stores | Elec- tronics | Building Materials | Food | Health, Personal | Gasoline Stations | Apparel | Leisure Goods | General Merch. | Misc. | Amuse- ment | Lodging | Eating & Drinking | Repair, Maint. | Personal Services | Taxable \$ Pull Factor |
|------------------------------|------------|--------------------|---------------------|------------------|-----------------------|-------------|---------------------|----------------------|-------------|------------------|-------------------|-------------|----------------|-------------|----------------------|-------------------|----------------------|------------------------------|
| Town name | | | | | | | | | | | | | | | | | | |
| Ham Lake | 15,296 | 3.06 | 0.07 | | 0.33 | 0.60 | | 0.89 | | 0.03 | | 0.42 | 1.30 | | 0.68 | 1.74 | 0.22 | 0.45 |
| Hutchinson | 14,178 | 0.77 | 0.60 | 3.35 | 3.42 | 1.57 | 0.81 | 1.54 | 0.29 | 0.39 | 3.38 | 0.71 | 0.83 | | 1.16 | 0.71 | 0.44 | 1.34 |
| Robbinsdale | 13,953 | | | | 0.19 | 0.67 | 2.69 | 0.38 | 0.32 | 1.07 | | 0.88 | | | 0.56 | 0.44 | 0.48 | 0.63 |
| Marshall | 13,680 | 1.79 | 1.87 | 0.65 | 2.29 | 2.03 | 0.30 | 1.13 | 0.71 | 0.89 | 3.21 | 0.35 | 0.35 | 1.32 | 1.39 | 1.35 | 0.27 | 1.44 |
| Brainerd | 13,590 | 1.54 | 0.32 | 0.51 | 0.39 | 1.57 | 3.13 | 1.92 | 0.85 | 1.77 | 0.42 | 1.48 | 0.35 | 0.85 | 1.57 | 0.64 | 0.90 | 0.87 |
| Otsego | 13,571 | | | | | | | | | | | 7.18 | | | 0.50 | 0.48 | 0.12 | 0.35 |
| New Ulm | 13,522 | 0.99 | 2.50 | 0.34 | 1.83 | 2.09 | | 0.61 | 0.31 | 0.66 | 2.40 | 0.90 | 0.49 | 0.94 | 1.01 | 1.06 | 0.36 | 1.12 |
| Bemidji | 13,431 | 2.62 | 1.75 | 1.21 | 3.99 | 1.71 | 2.71 | 2.84 | 1.69 | 2.14 | 3.06 | 3.91 | 0.83 | 2.26 | 2.35 | 3.23 | 0.54 | 2.09 |
| North Mankato | 13,394 | 0.90 | | | 0.88 | 0.76 | | | 0.21 | 0.02 | | 1.59 | 0.98 | | 0.37 | 1.06 | 0.30 | 0.38 |
| Hugo | 13,332 | 0.00 | 0.01 | | 0.19 | 0.72 | | | | | | 0.85 | | | 0.27 | 0.61 | 0.33 | 0.18 |
| Fergus Falls | 13,138 | 7.55 | 1.12 | 0.31 | 2.12 | 1.46 | 0.80 | 1.33 | 0.52 | 0.25 | 4.64 | 1.05 | 0.35 | 1.27 | 1.22 | 1.01 | 0.45 | 1.54 |
| Sauk Rapids | 12,773 | 1.61 | | | | | | 0.80 | 0.14 | | | 4.33 | 0.14 | | 0.58 | 0.53 | 0.19 | 0.36 |
| Worthington | 12,764 | 1.87 | 1.49 | 1.01 | 0.87 | 0.70 | 1.38 | 1.82 | 0.62 | 0.21 | 2.76 | 0.24 | 0.51 | 1.22 | 0.90 | 2.76 | 0.28 | 0.99 |
| Monticello | 12,759 | 1.98 | 0.22 | | 2.14 | 0.81 | 0.41 | | | 0.03 | | 16.57 | 1.06 | 0.51 | 1.63 | 1.23 | 0.22 | 1.22 |
| Vadnais Heights | 12,302 | 5.38 | 0.34 | | | 1.27 | | 0.72 | 0.06 | 0.37 | | 20.43 | 0.39 | | 1.19 | 1.35 | 0.35 | 1.35 |
| Mounds View | 12,155 | | | 0.85 | | 0.64 | | 1.07 | | 0.17 | | 1.15 | 0.07 | | 0.82 | 0.62 | 0.22 | 0.31 |
| Cloquet | 12,124 | 0.68 | 0.12 | 0.11 | 1.44 | 1.29 | | 1.03 | 0.19 | 0.14 | | 12.12 | 1.35 | 0.45 | 1.30 | 0.94 | 0.44 | 0.96 |
| East Bethel | 11,626 | 0.77 | | | 0.03 | 0.46 | | 1.24 | | | | 0.08 | 0.29 | | 0.31 | 1.14 | 0.03 | 0.20 |
| North St Paul | 11,460 | | 0.36 | | | | | 1.22 | | 0.06 | | 8.78 | | | 0.47 | 0.82 | 0.11 | 0.42 |
| St Peter | 11,196 | | | | 0.44 | 1.10 | | 1.12 | 0.18 | | | 1.75 | | | 0.79 | 0.60 | 0.02 | 0.36 |
| Unadjusted Average: * | | 2.10 | 0.87 | 0.93 | 1.44 | 1.15 | 1.53 | 1.24 | 0.49 | 0.58 | 2.84 | 4.12 | 0.62 | 1.10 | 0.99 | 1.16 | 0.34 | 0.88 |

* Raw averages; not adjusted for special circumstances. For example, in cities with a college student population that is large relative to overall population, these pull factors may understate the relative strength of the retail sector. While college students are counted as part of the city population, in general they spend less than other city residents in many retail categories. Most Pull Factor outliers were eliminated for calculating typical pull factors used in the expected sales formula.

Comparison of Pull Factors by Merchandise Category

2010 Index of "Pulling Power" Towns with Populations between 10,200 & 15,400 (Range: Population of Marshall +/- ~ 20%.) (25 Cities)

Rankings

| Town | Population | Vehicles, Parts | Furniture Stores | Elec- tronics | Building Materials | Food | Health, Personal | Gasoline Stations | Apparel | Leisure Goods | General Merch. | Misc. | Amuse- ment | Lodging | Eating & Drinking | Repair, Maint. | Personal Services | Taxable \$ Pull Factor |
|-----------------|------------|--------------------|---------------------|------------------|-----------------------|------|---------------------|----------------------|---------|------------------|-------------------|-------|----------------|---------|----------------------|-------------------|----------------------|------------------------------|
| Town name | | | | | | | | | | | | | | | | | | |
| Ham Lake | # 1 | # 3 | # 12 | | # 12 | # 16 | | # 12 | | # 14 | | # 17 | # 2 | | # 13 | # 3 | # 15 | # 12 |
| Hutchinson | # 2 | # 13 | # 6 | # 1 | # 2 | # 4 | # 5 | # 4 | # 8 | # 6 | # 2 | # 16 | # 5 | | # 8 | # 13 | # 5 | # 5 |
| Robbinsdale | # 3 | | | | # 13 | # 14 | # 3 | # 16 | # 6 | # 3 | | # 14 | | | # 15 | # 20 | # 3 | # 11 |
| Marshall | # 4 | # 7 | # 2 | # 5 | # 3 | # 2 | # 8 | # 8 | # 3 | # 4 | # 3 | # 18 | # 11 | # 2 | # 4 | # 5 | # 12 | # 3 |
| Brainerd | # 5 | # 9 | # 9 | # 6 | # 11 | # 5 | # 1 | # 2 | # 2 | # 2 | # 7 | # 10 | # 12 | # 6 | # 3 | # 14 | # 1 | # 10 |
| Otsego | # 6 | | | | | | | | | | | # 5 | | | # 16 | # 19 | # 17 | # 17 |
| New Ulm | # 7 | # 10 | # 1 | # 7 | # 6 | # 1 | | # 15 | # 7 | # 5 | # 6 | # 13 | # 8 | # 5 | # 9 | # 9 | # 7 | # 7 |
| Bemidji | # 8 | # 4 | # 3 | # 2 | # 1 | # 3 | # 2 | # 1 | # 1 | # 1 | # 4 | # 7 | # 6 | # 1 | # 1 | # 1 | # 2 | # 1 |
| North Mankato | # 9 | # 11 | | | # 8 | # 11 | | | # 9 | # 15 | | # 9 | # 4 | | # 18 | # 8 | # 10 | # 14 |
| Hugo | # 10 | # 15 | # 13 | | # 14 | # 12 | | | | | | # 15 | | | # 20 | # 16 | # 9 | # 20 |
| Fergus Falls | # 11 | # 1 | # 5 | # 8 | # 5 | # 6 | # 6 | # 5 | # 5 | # 8 | # 1 | # 12 | # 10 | # 3 | # 6 | # 10 | # 4 | # 2 |
| Sauk Rapids | # 12 | # 8 | | | | | | # 13 | # 12 | | | # 6 | # 14 | | # 14 | # 18 | # 16 | # 15 |
| Worthington | # 13 | # 6 | # 4 | # 3 | # 9 | # 13 | # 4 | # 3 | # 4 | # 9 | # 5 | # 19 | # 7 | # 4 | # 10 | # 2 | # 11 | # 8 |
| Monticello | # 14 | # 5 | # 10 | | # 4 | # 10 | # 7 | | | # 13 | | # 2 | # 3 | # 7 | # 2 | # 6 | # 14 | # 6 |
| Vadnais Heights | # 15 | # 2 | # 8 | | | # 8 | | # 14 | # 13 | # 7 | | # 1 | # 9 | | # 7 | # 4 | # 8 | # 4 |
| Mounds View | # 16 | | | # 4 | | # 15 | | # 10 | | # 10 | | # 11 | # 15 | | # 11 | # 15 | # 13 | # 18 |
| Cloquet | # 17 | # 14 | # 11 | # 9 | # 7 | # 7 | | # 11 | # 10 | # 11 | | # 3 | # 1 | # 8 | # 5 | # 11 | # 6 | # 9 |
| East Bethel | # 18 | # 12 | | | # 15 | # 17 | | # 6 | | # 6 | | # 20 | # 13 | | # 19 | # 7 | # 19 | # 19 |
| North St Paul | # 19 | | # 7 | | | | | # 7 | | # 12 | | # 4 | | | # 17 | # 12 | # 18 | # 13 |
| St Peter | # 20 | | | | # 10 | # 9 | | # 9 | # 11 | | | # 8 | | | # 12 | # 17 | # 20 | # 16 |

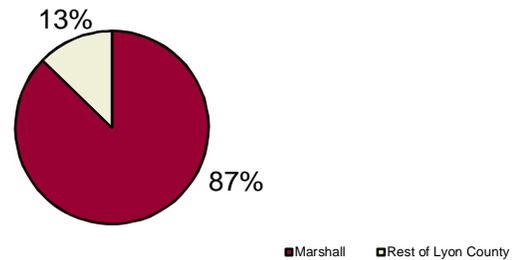
Above are all communities in the population range listed in the title with data available by merchandise category. Adjustments for special circumstances may be necessary for accurate comparisons.

Marshall & Lyon County Comparison, 2010

It is important to review the retail performance for the whole county and not just the city in isolation. For example, it is common for county seat towns to have above-average retail performance, while the county overall has a leakage of sales. This is usually because the county seat city doesn't have the critical mass of retail to attract the purchases of everyone in the county. By analyzing county data, city business people can develop strategies to recapture some of the sales being lost to other cities. For counties that have a local option sales tax, the analysis of county sales is extremely important, since lost sales are lost tax dollars. A thorough analysis of county sales can help county officials develop more meaningful economic development plans aimed at recapturing the lost sales.

The table below shows retail sales and number of firms by merchandise category for Marshall and Lyon County in 2010. Marshall accounted for 55 percent of the county's firms and 87 percent of the county's sales.

Share of County Sales



Sales by Merchandise Category, Marshall & Lyon County, 2010

| Merchandise Category | Marshall | | Lyon County | | City's Share of County Total | |
|---------------------------|----------------------------|-----------------|----------------------------|-----------------|------------------------------|--------------|
| | Taxable Sales (\$millions) | Number of Firms | Taxable Sales (\$millions) | Number of Firms | Sales | Firms |
| Vehicles & Parts | \$8.70 | 11 | \$9.24 | 18 | 94.2% | 61.1% |
| Furniture Stores | \$5.70 | 10 | \$5.95 | 15 | 95.8% | 66.7% |
| Electronics | \$2.87 | 7 | \$3.54 | 11 | 81.1% | 63.6% |
| Building Materials | \$25.77 | 11 | \$29.83 | 18 | 86.4% | 61.1% |
| Food, Groceries | \$16.07 | 13 | \$18.60 | 25 | 86.4% | 52.0% |
| Health, Personal Stores | \$0.45 | 8 | \$0.50 | 9 | 90.5% | 88.9% |
| Gasoline Stations | \$2.71 | 7 | \$5.54 | 13 | 48.9% | 53.8% |
| Apparel | \$1.66 | 11 | \$1.66 | 15 | 99.6% | 73.3% |
| Leisure Goods | \$2.93 | 16 | \$3.04 | 20 | 96.4% | 80.0% |
| General Merchandise | \$44.83 | 7 | \$45.55 | 11 | 98.4% | 63.6% |
| Miscellaneous Retail | \$1.42 | 43 | \$1.86 | 62 | 76.7% | 69.4% |
| Non-Store Retailers | \$0.64 | 14 | \$0.69 | 22 | 92.2% | 63.6% |
| Amusement & Recreation | \$1.31 | 5 | \$1.88 | 15 | 70.0% | 33.3% |
| Accommodations | \$5.52 | 10 | \$5.62 | 12 | 98.2% | 83.3% |
| Eating & Drinking Places | \$24.39 | 34 | \$30.89 | 60 | 78.9% | 56.7% |
| Repair, Maintenance | \$3.85 | 28 | \$8.02 | 81 | 48.0% | 34.6% |
| Personal Service, Laundry | \$0.52 | 42 | \$0.69 | 67 | 75.2% | 62.7% |
| Total Sales* | \$177.83 | 360 | \$203.80 | 658 | 87.3% | 54.7% |

Lyon County Retail Trade Overview

Total Taxable and Gross Retail Sales

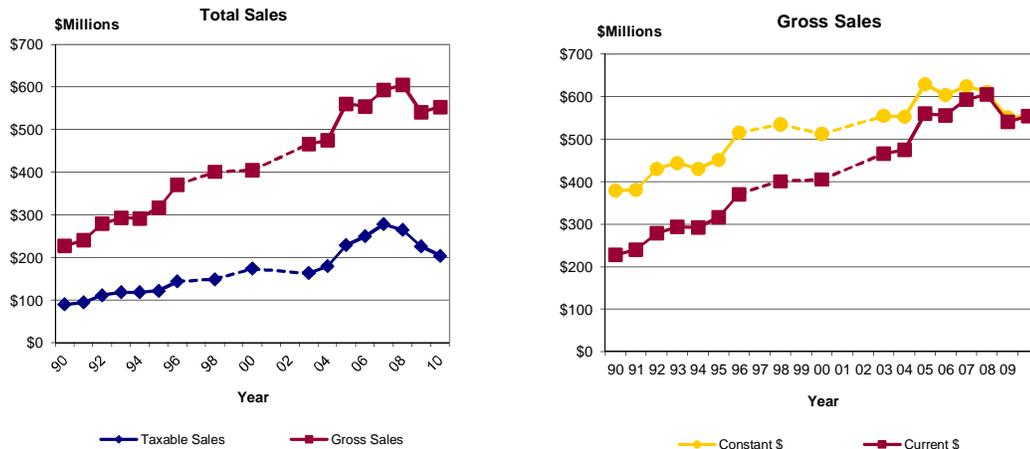
The table below presents gross and taxable retail and services sales for Lyon County from 1990 through 2010. Taxable sales in Lyon County increased 25.1 percent from 2003 to 2010, while the number of firms fell 1.6 percent. Statewide, taxable sales increased 6.1 percent over the same time period and the number of firms rose 8.2 percent. The per capita sales and pull factor data in this table are based on taxable sales, the more verified sales measure.

The table also presents sales data in constant 2010 dollars. These figures have been adjusted for inflation to reflect their value 2010. For example, in 1990, taxable sales in Lyon County totaled \$89.57 million, an amount worth \$149.29 million in 2010 dollars. In constant dollars, gross sales fell 0.2 percent between 2003 and 2010. Constant dollar taxable sales increased 5.1 percent over the same time period.

| Year | Estimated Population | Current Dollars | | Constant 2010 Dollars | | Number of Firms | Per Capita Sales | Pull Factor |
|------------------------|----------------------|---------------------------|----------------------------|---------------------------|----------------------------|-----------------|------------------|-------------|
| | | Gross Sales* (\$millions) | Taxable Sales (\$millions) | Gross Sales* (\$millions) | Taxable Sales (\$millions) | | | |
| 1990 | 24,789 | \$227.51 | \$89.57 | \$379.18 | \$149.29 | 681 | \$3,613 | 0.82 |
| 1991 | 24,663 | \$239.88 | \$94.24 | \$380.76 | \$149.58 | 680 | \$3,821 | 0.87 |
| 1992 | 24,641 | \$279.03 | \$111.20 | \$429.27 | \$171.07 | 716 | \$4,513 | 0.93 |
| 1993 | 24,765 | \$293.11 | \$118.09 | \$444.11 | \$178.92 | 707 | \$4,768 | 0.95 |
| 1994 | 24,960 | \$291.98 | \$117.50 | \$429.38 | \$172.80 | 669 | \$4,708 | 0.86 |
| 1995 | 24,925 | \$316.07 | \$121.49 | \$451.53 | \$173.56 | 647 | \$4,874 | 0.85 |
| 1996 | 24,605 | \$370.77 | \$143.25 | \$514.95 | \$198.96 | 701 | \$5,822 | 0.87 |
| 1997 | 24,444 | NA | NA | NA | NA | NA | NA | NA |
| 1998 | 24,398 | \$400.71 | \$148.41 | \$534.28 | \$197.88 | 694 | \$6,083 | 0.87 |
| 1999 | 24,256 | NA | NA | NA | NA | NA | NA | NA |
| 2000 | 25,425 | \$404.62 | \$173.67 | \$512.18 | \$219.83 | 654 | \$6,831 | 0.90 |
| 2001 | 25,407 | NA | NA | NA | NA | NA | NA | NA |
| 2002 | 25,118 | NA | NA | NA | NA | NA | NA | NA |
| 2003 | 24,819 | \$465.78 | \$162.96 | \$554.50 | \$194.00 | 669 | \$6,566 | 0.74 |
| 2004 | 24,703 | \$475.05 | \$179.47 | \$552.38 | \$208.68 | 667 | \$7,265 | 0.78 |
| 2005 | 24,472 | \$560.11 | \$228.37 | \$629.33 | \$256.60 | 677 | \$9,332 | 0.98 |
| 2006 | 24,640 | \$555.07 | \$249.04 | \$603.34 | \$270.70 | 670 | \$10,107 | 1.05 |
| 2007 | 24,695 | \$592.75 | \$278.20 | \$623.95 | \$292.84 | 671 | \$11,265 | 1.16 |
| 2008 | 24,844 | \$605.17 | \$264.53 | \$611.28 | \$267.20 | 665 | \$10,647 | 1.11 |
| 2009 | 25,074 | \$540.50 | \$224.89 | \$551.53 | \$229.48 | 650 | \$8,969 | 1.00 |
| 2010 | 25,865 | \$553.65 | \$203.80 | \$553.65 | \$203.80 | 658 | \$7,879 | 0.87 |
| 7 yr Change '03 to '10 | 4.2% | 18.9% | 25.1% | -0.2% | 5.1% | -1.6% | 20.0% | 18.7% |
| 3 yr Change '07 to '10 | 4.7% | -6.6% | -26.7% | -11.3% | -30.4% | -1.9% | -30.1% | -24.6% |

*Gross sales figures are self-reported by firms and not audited by the Dept. of Revenue for accuracy.

Lyon County: Total Retail Sales

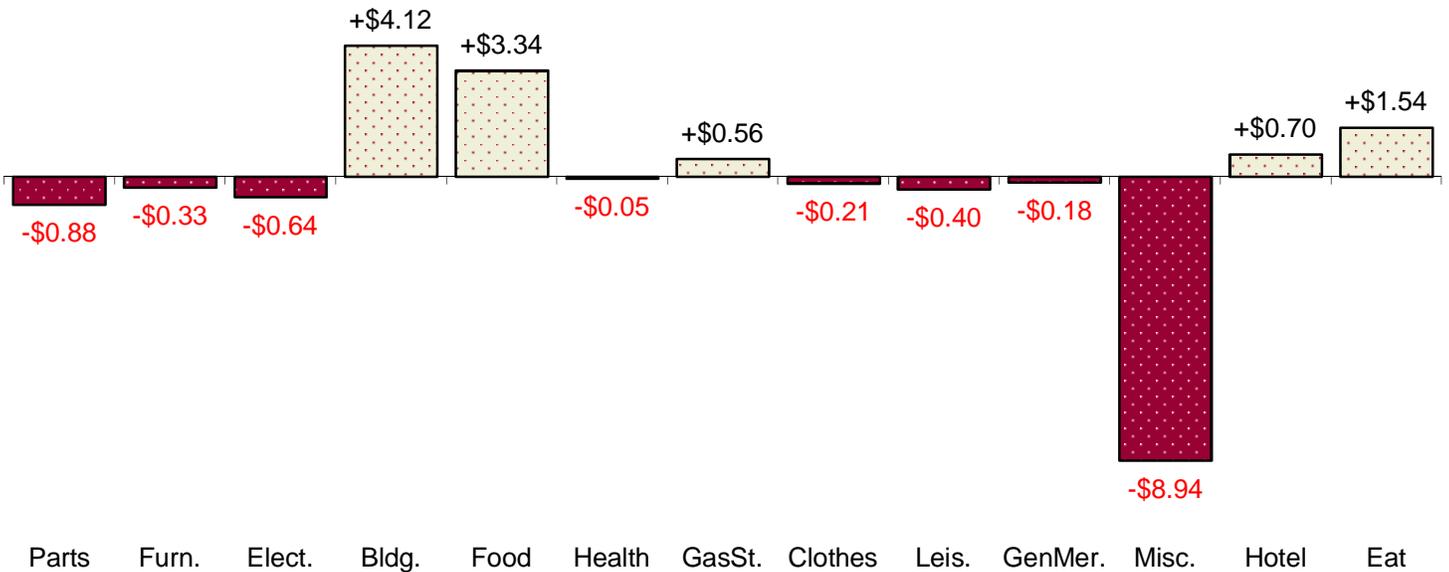


Lyon County Components of Change, 2007 to 2010

| Category | Taxable Sales 2007 | Taxable Sales 2010 | Dollar Change | Percent Change |
|--|-----------------------|-----------------------|----------------------|-------------------|
| Vehicles & Parts | \$10,114,982 | \$9,237,619 | -\$877,363 | -8.67% |
| Furniture Stores | \$6,278,558 | \$5,945,852 | -\$332,706 | -5.30% |
| Electronics | \$4,188,506 | \$3,544,935 | -\$643,571 | -15.37% |
| Building Materials | \$25,710,609 | \$29,834,143 | +\$4,123,534 | +16.04% |
| Food, Groceries | \$15,260,184 | \$18,601,237 | +\$3,341,053 | +21.89% |
| Health, Personal Stores | \$550,076 | \$497,860 | -\$52,216 | -9.49% |
| Gasoline Stations | \$4,974,367 | \$5,537,511 | +\$563,144 | +11.32% |
| Apparel | \$1,871,757 | \$1,664,928 | -\$206,829 | -11.05% |
| Leisure Goods | \$3,439,484 | \$3,038,171 | -\$401,313 | -11.67% |
| General Merchandise Stores | \$45,724,766 | \$45,547,433 | -\$177,333 | -0.39% |
| Miscellaneous Retail | \$10,794,032 | \$1,857,370 | -\$8,936,662 | -82.79% |
| Accommodations | \$4,916,106 | \$5,617,291 | +\$701,185 | +14.26% |
| Eating & Drinking Places | \$29,351,996 | \$30,890,972 | +\$1,538,976 | +5.24% |
| Total Retail and Services Sales | \$278,196,507 | \$203,799,981 | -\$74,396,526 | -26.74% |

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 - 2010



Pull Factors By Merchandise Category Lyon County

The following tables and charts depict pull factors in Lyon County from 1990 to 2000* by merchandise category. Pull factors are a measure of trade area size that provide a useful measure of changes over time because they account for changes in population and state-wide industry trends.

Category Descriptions

Building Materials: Includes retail establishments primarily engaged in selling lumber and other building materials; paint, glass, and wallpaper; hardware; nursery stock; and lawn and garden supplies.

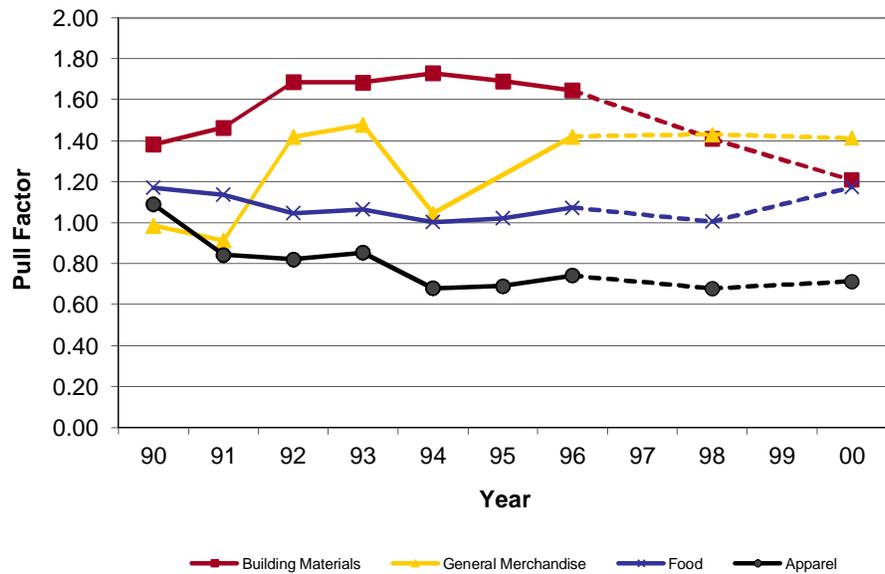
General Merchandise: Includes retail stores which sell a number of lines of merchandise, such as dry goods, apparel and accessories, furniture and home furnishings, small wares, hardware, and food. The stores included in this group are known as department stores, variety stores, general merchandise stores, catalog showrooms, warehouse clubs, and general stores.

Food: This group is comprised of retail stores primarily engaged in selling food for home preparation and consumption.

Apparel: Retail stores primarily engaged in selling clothing of all kinds and related articles for personal wear and adornment. Not included are establishments which meet the criteria for Department Stores even though most of their receipts are from the sale of apparel and apparel accessories.

*Due to a change in how firms are categorized beginning with fiscal year 2003, only data through fiscal year 2000 are presented in this section.

Pull Factors by Merchandise Category (1 of 3)



**Pull Factors by Merchandise Category
Lyon County, 1990-2000**

| Year | Building Materials | General Merchandise | Food | Apparel |
|-----------------------------|--------------------|---------------------|--------|---------|
| 1990 | 1.38 | 0.99 | 1.17 | 1.09 |
| 1991 | 1.46 | 0.91 | 1.14 | 0.84 |
| 1992 | 1.69 | 1.42 | 1.05 | 0.82 |
| 1993 | 1.68 | 1.48 | 1.06 | 0.85 |
| 1994 | 1.73 | 1.04 | 1.00 | 0.68 |
| 1995 | 1.69 | NA | 1.02 | 0.69 |
| 1996 | 1.64 | 1.42 | 1.07 | 0.74 |
| 1997 | NA | NA | NA | NA |
| 1998 | 1.41 | 1.43 | 1.01 | 0.68 |
| 1999 | NA | NA | NA | NA |
| 2000 | 1.21 | 1.41 | 1.17 | 0.71 |
| % Change, '90 to '00 | | | | |
| | -12.50% | 43.42% | 0.33% | -34.60% |
| % Change, '98 to '00 | | | | |
| | -14.28% | -1.12% | 16.75% | 5.10% |

These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide, all cities are compared on the same basis.

Pull Factors By Merchandise Category

Lyon County

The following tables and charts depict pull factors in Lyon County from 1990 to 2000* by merchandise category. Pull factors are a measure of trade area size that provide a useful measure of changes over time because they account for changes in population and state-wide industry trends.

Category Descriptions

Furniture: This group includes retail stores selling goods used for furnishing the home such as furniture, floor coverings, draperies, glass and chinaware, domestic stoves, refrigerators, and other household electric and gas appliances.

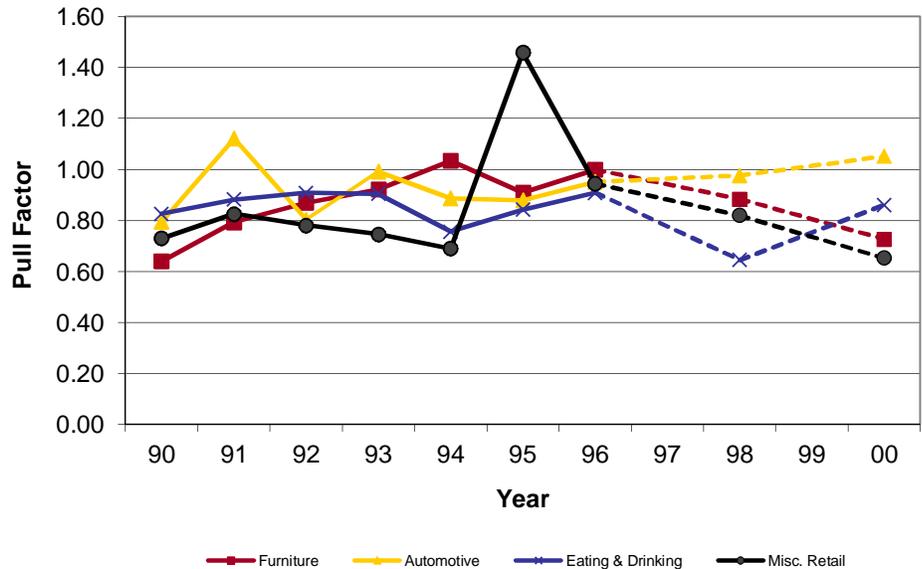
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

Eating & Drinking: This major group includes retail establishments engaged in selling prepared food and drinks for consumption on the premises. Also included are caterers which serve prepared food other than at the place of business and lunch counters and refreshment stands selling prepared foods and drinks for immediate consumption.

Miscellaneous Retail: This category includes retail establishments not elsewhere classified. These establishments fall into the following categories: liquor stores; used merchandise stores; miscellaneous shopping goods stores; nonstore retailers, fuel dealers, florists, cigar stores and stands, news dealers and newsstands, and miscellaneous retail stores not elsewhere classified.

*Due to a change in how firms are categorized beginning with fiscal year 2003, only data through fiscal year 2000 are presented in this section.

Pull Factors by Merchandise Category (2 of 3)



**Pull Factors by Merchandise Category
Lyon County, 1990-2000**

| Year | Furniture | Automotive | Eating & Drinking | Misc. Retail |
|------|-----------|------------|-------------------|--------------|
| 1990 | 0.64 | 0.79 | 0.83 | 0.73 |
| 1991 | 0.79 | 1.12 | 0.88 | 0.83 |
| 1992 | 0.87 | 0.80 | 0.91 | 0.78 |
| 1993 | 0.92 | 0.99 | 0.90 | 0.75 |
| 1994 | 1.03 | 0.89 | 0.76 | 0.69 |
| 1995 | 0.91 | 0.88 | 0.84 | 1.46 |
| 1996 | 1.00 | 0.95 | 0.91 | 0.94 |
| 1997 | NA | NA | NA | NA |
| 1998 | 0.88 | 0.98 | 0.65 | 0.82 |
| 1999 | NA | NA | NA | NA |
| 2000 | 0.73 | 1.05 | 0.86 | 0.65 |

% Change, '90 to '00 Furniture: 13.58% Automotive: 32.47% Eating & Drinking: 4.22% Misc. Retail: -10.50%

% Change, '98 to '00 Furniture: -17.75% Automotive: 7.74% Eating & Drinking: 33.40% Misc. Retail: -20.40%

These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide, all cities are compared on the same basis.

Pull Factors By Merchandise Category Lyon County

The following tables and charts depict pull factors in Lyon County from 1990 to 2000* by merchandise category. Pull factors are a measure of trade area size that provide a useful measure of changes over time because they account for changes in population and state-wide industry trends.

Category Descriptions

Lodging: Includes establishments engaged in providing lodging, or lodging and meals, and camping facilities.

Personal Services: includes establishments primarily engaged in providing services generally to individuals, such as barber and beauty shops, drycleaning plants, laundries, and photographic studios.

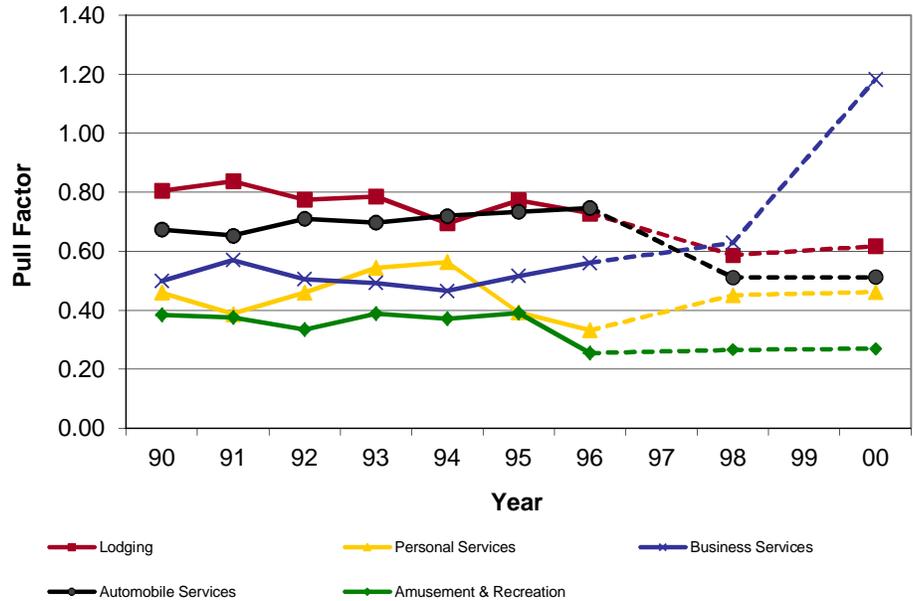
Business Services: Includes establishments primarily engaged in providing services, not elsewhere classified, to business establishments on a contract or fee basis.

Automobile Services: Includes establishments primarily engaged in furnishing automotive repair, rental, leasing, parking, and other services.

Amusement and Recreation: This group includes establishments primarily engaged in providing amusement, recreation, or entertainment services, not elsewhere classified.

*Due to a change in how firms are categorized beginning with fiscal year 2003, only data through fiscal year 2000 are presented in this section.

Pull Factors by Merchandise Category (3 of 3)



**Pull Factors by Merchandise Category
Lyon County, 1990-2000**

| Year | Lodging | Personal Services | Business Services | Automobile Services | Amusement & Recreation |
|----------------------|---------|-------------------|-------------------|---------------------|------------------------|
| 1990 | 0.80 | 0.46 | 0.50 | 0.67 | 0.38 |
| 1991 | 0.84 | 0.39 | 0.57 | 0.65 | 0.38 |
| 1992 | 0.77 | 0.46 | 0.51 | 0.71 | 0.34 |
| 1993 | 0.79 | 0.54 | 0.49 | 0.70 | 0.39 |
| 1994 | 0.70 | 0.56 | 0.47 | 0.72 | 0.37 |
| 1995 | 0.77 | 0.39 | 0.52 | 0.73 | 0.39 |
| 1996 | 0.73 | 0.33 | 0.56 | 0.75 | 0.26 |
| 1997 | NA | NA | NA | NA | NA |
| 1998 | 0.59 | 0.45 | 0.63 | 0.51 | 0.27 |
| 1999 | NA | NA | NA | NA | NA |
| 2000 | 0.62 | 0.46 | 1.18 | 0.51 | 0.27 |
| <hr/> | | | | | |
| % Change, '90 to '00 | -23.31% | 0.32% | 136.77% | -23.93% | -29.88% |
| % Change, '98 to '00 | 5.32% | 2.41% | 88.20% | 0.19% | 1.14% |

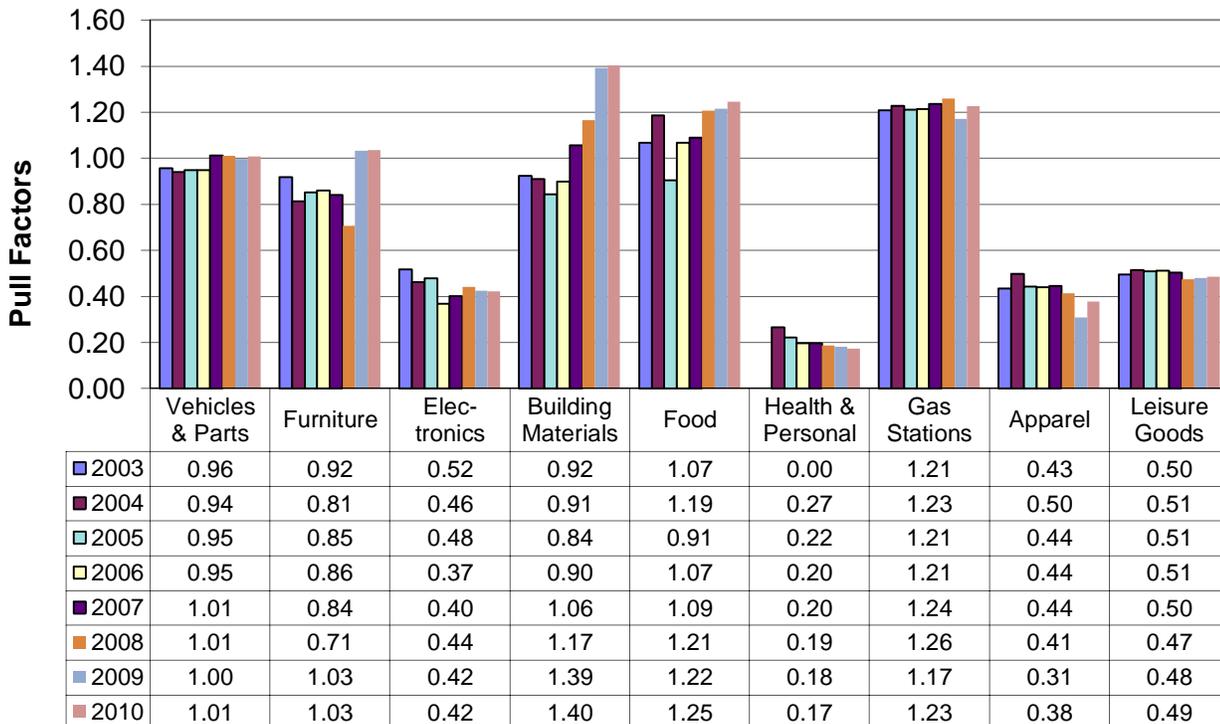
These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide, all cities are compared on the same basis.

Pull Factors By Merchandise Category

Lyon County

The following tables and charts depict pull factors in Lyon County from 2003 to 2010* by merchandise category. Pull factors are a measure of trade area size that provide a useful measure of changes over time because they account for changes in population and state-wide industry trends.

Pull Factor by NAICS Merchandise Category (1 of 2)



NAICS Category Descriptions

Motor Vehicles & Parts: Establishments that sell new & used autos, boats, motorcycles, golf carts, RV's, campers, trailers, tires, and parts.

Furniture: Stores that sell furniture, beds, carpeting, window coverings, lamps, china, kitchenware, & woodburning stoves.

Electronics: Establishments primarily engaged in retailing household-type appliances, sewing machines, cameras, computers, and other electronic goods.

Building Materials: Establishments that sell lumber, hardware, paint, wallpaper, tile, hardwood floors, roofing, fencing, ceiling fans, lawn equipment, garden centers, and feed stores.

Food: Grocery stores, deli's, bakery, & butcher shops that sell food to be prepared at home. Liquor stores.

Health & Personal: Pharmacies, food supplements, vision supplies, cosmetics, & hearing aid stores.

Gas Stations: Retailers that sell fuel along with convenience store items.

Apparel: New clothing and accessories, jewelry, shoes, bridal shops, clock shops, and luggage stores.

Leisure Goods: Sporting goods, books, music, hobby stores, fabric shops, and toy stores.

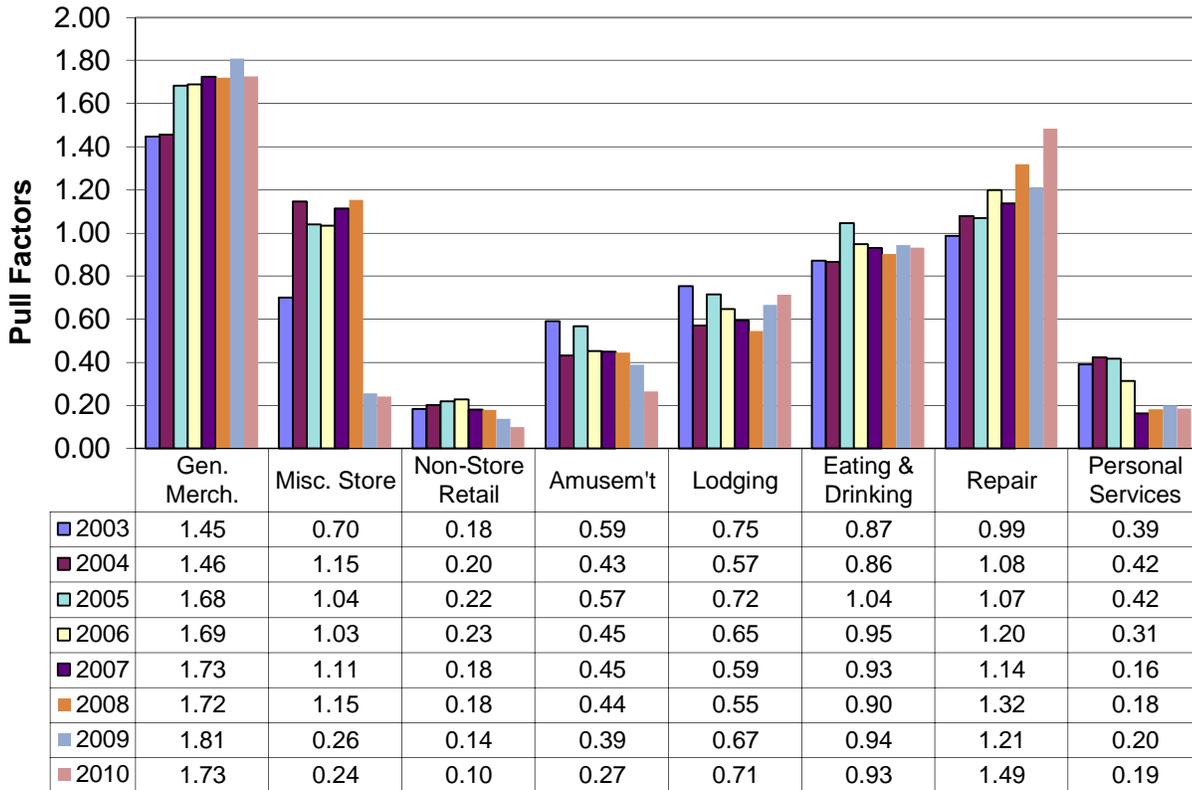
*Caution should be used when comparing pull factors before 2003 to those in later years due to the switch from SIC to NAICS.

Recent Trends By Merchandise Category

Lyon County

The following tables and charts depict pull factors in Lyon County from 2003 to 2010* by merchandise category. Pull factors are a measure of trade area size that provide a useful measure of changes over time because they account for changes in population and state-wide industry trends.

Pull Factor by NAICS Merchandise Category (2 of 2)



NAICS Category Descriptions

General Merchandise: Establishments that sell a mixed line of goods. Examples are department stores, supercenters, and dollar stores.

Miscellaneous Store Retailers: Stores not covered in other categories such as florists, office supplies, pets, antiques, tobacco, art, used merchandise, and trophies.

Non-Store Retail: Retailers that do not use stores. This includes mail order, internet selling, bazaars, vending machines, fuel oil dealers, firewood dealers, door-to-door sales, and produce stands.

Amusement: Establishments such as golf courses, bowling lanes, marinas, amusement parks, water parks, shooting ranges, pool halls, horseback riding, ballrooms, health club facilities, ski hills, and casinos.

Lodging: Seasonal resorts, hotels, boarding houses, bed & breakfast, campgrounds, RV parks.

Eating & Drinking: Restaurants, donut shops, coffee house, cafeteria, caterers, taverns, and nightclubs.

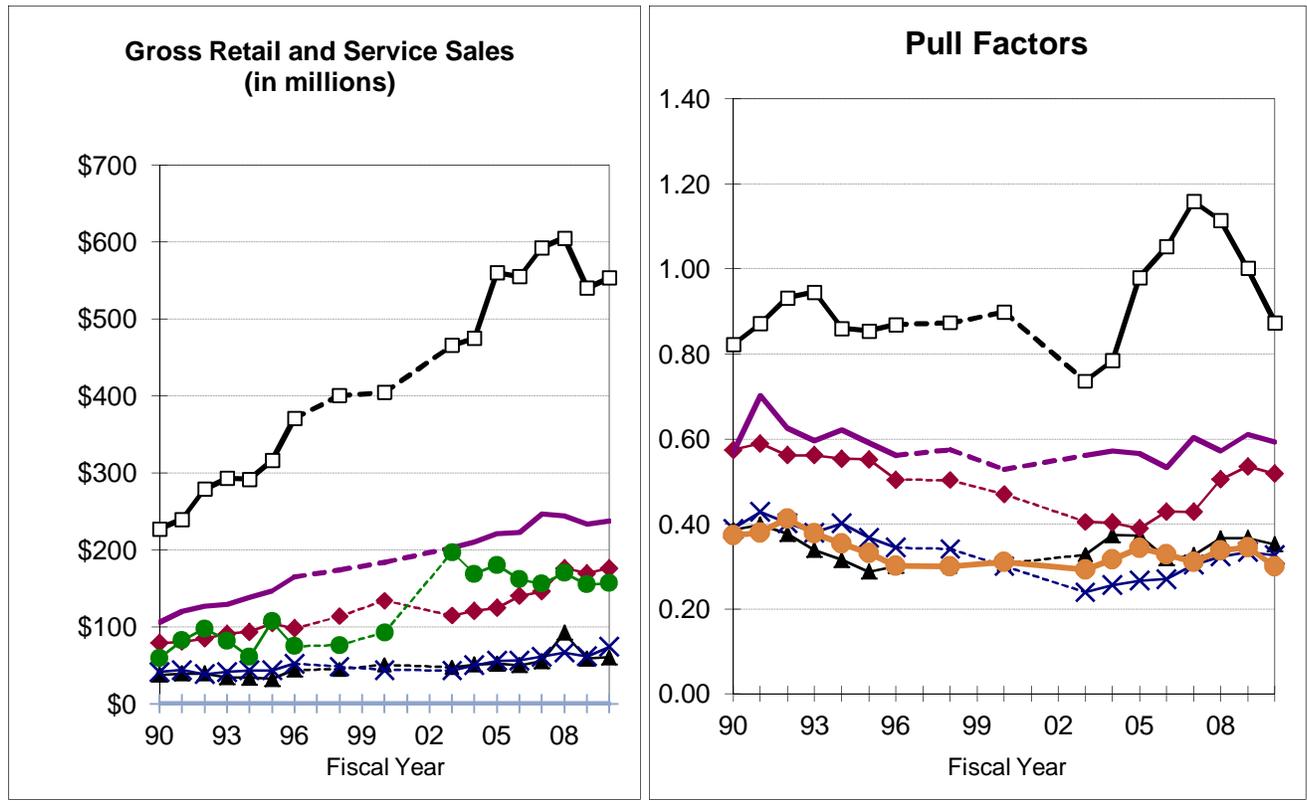
Repair: Businesses that return equipment to working order. Examples: cars, lawnmowers, small engines, knives, shoes, computers, furniture, and appliances.

Personal Services: Barbers, beauty salons, tanning facilities, funeral homes, laundromats, dry cleaners, pet groomers, kennels, and photo finishing.

*Caution should be used when comparing pull factors before 2003 to those in later years due to the switch from SIC to NAICS.

Comparison with Neighboring Counties

Lyon County



- Lyon County
- ▲ Lincoln County
- ✱ Murray County
- ◆ Pipestone County
- Redwood County
- Yellow Medicine County

Comparison with Neighboring Counties, 2010

| Town | Population | Gross Sales (\$millions) | Taxable Sales (\$millions) | Number of Firms | Per Capita Taxable Sales | Pull Factor (Taxable Sales) |
|------------------------|------------|--------------------------|----------------------------|-----------------|--------------------------|-----------------------------|
| Lyon County | 25,865 | \$553.65 | \$203.80 | 658 | \$7,879 | 0.87 |
| Lincoln County | 5,892 | \$60.30 | \$18.71 | 169 | \$3,175 | 0.35 |
| Murray County | 8,698 | \$73.90 | \$25.63 | 244 | \$2,946 | 0.33 |
| Pipestone County | 9,578 | \$175.94 | \$44.77 | 264 | \$4,674 | 0.52 |
| Redwood County | 16,058 | \$237.43 | \$85.77 | 427 | \$5,341 | 0.59 |
| Yellow Medicine County | 10,425 | \$156.71 | \$28.27 | 284 | \$2,711 | 0.30 |

Trade Area Analysis of Retail Sales

Lyon County

The following tables provide information on retail sales by merchandise category. "Potential sales" is a standard to which actual performance is compared. In calculating potential sales, population and income characteristics are taken into account. Potential sales can be used as a guideline or "par value" in analyzing retail strength.

Deviations from these norms can be analyzed to first judge whether they should be considered relevant. If the differences appear to be significant (whether in dollar amounts or relatively with percentages), additional consideration is merited. Categories with undesirable performance may be further examined for potential corrective action. It is also important to determine whether or not the situation is relatively uncontrollable due to external or extenuating circumstances. In cases of favorable differences from expectations, the positive aspects should be identified and built upon.

Trade Area Analysis by Merchandise Category, 2010

| Merchandise Group | Potential Sales (\$millions) | Actual Sales (\$millions) | Variance Between Actual & Potential | | Trade Area Pop. Gain or Loss | Number of Firms | Percent of Total Sales |
|---|------------------------------|---------------------------|-------------------------------------|------------------|------------------------------|-----------------|------------------------|
| | | | In Dollars (millions) | As % of Expected | | | |
| Vehicles & Parts | \$7.93 | \$9.24 | +\$1.30 | +16.4% | 4,247 | 18 | 4.5% |
| Furniture Stores | \$4.97 | \$5.95 | +\$0.98 | +19.6% | 5,076 | 15 | 2.9% |
| Electronics | \$7.26 | \$3.54 | -\$3.72 | -51.2% | -13,236 | 11 | 1.7% |
| Building Materials | \$18.39 | \$29.83 | +\$11.45 | +62.2% | 16,100 | 18 | 14.6% |
| Food, Groceries | \$12.92 | \$18.60 | +\$5.69 | +44.0% | 11,387 | 25 | 9.1% |
| Health, Personal Stores | \$2.47 | \$0.50 | -\$1.98 | -79.9% | -20,660 | 9 | 0.2% |
| Gasoline Stations | \$3.91 | \$5.54 | +\$1.63 | +41.7% | 10,792 | 13 | 2.7% |
| Apparel | \$3.82 | \$1.66 | -\$2.15 | -56.4% | -14,581 | 15 | 0.8% |
| Leisure Goods | \$5.40 | \$3.04 | -\$2.36 | -43.8% | -11,320 | 20 | 1.5% |
| General Merchandise Stores | \$22.83 | \$45.55 | +\$22.71 | +99.5% | 25,727 | 11 | 22.3% |
| Miscellaneous Retail | \$6.64 | \$1.86 | -\$4.78 | -72.0% | -18,628 | 62 | 0.9% |
| Amusement & Recreation | \$6.13 | \$1.88 | -\$4.25 | -69.4% | -17,939 | 15 | 0.9% |
| Accommodations | \$6.81 | \$5.62 | -\$1.19 | -17.5% | -4,531 | 12 | 2.8% |
| Eating & Drinking Places | \$28.66 | \$30.89 | +\$2.23 | +7.8% | 2,017 | 60 | 15.2% |
| Repair, Maintenance | \$4.67 | \$8.02 | +\$3.35 | +71.7% | 18,544 | 81 | 3.9% |
| Personal Services, Laundry | \$3.21 | \$0.69 | -\$2.52 | -78.4% | -20,272 | 67 | 0.3% |
| Total Taxable Retail & Service | \$201.82 | \$203.80 | +\$1.98 | +1.0% | 253 | 658 | 100.0% |

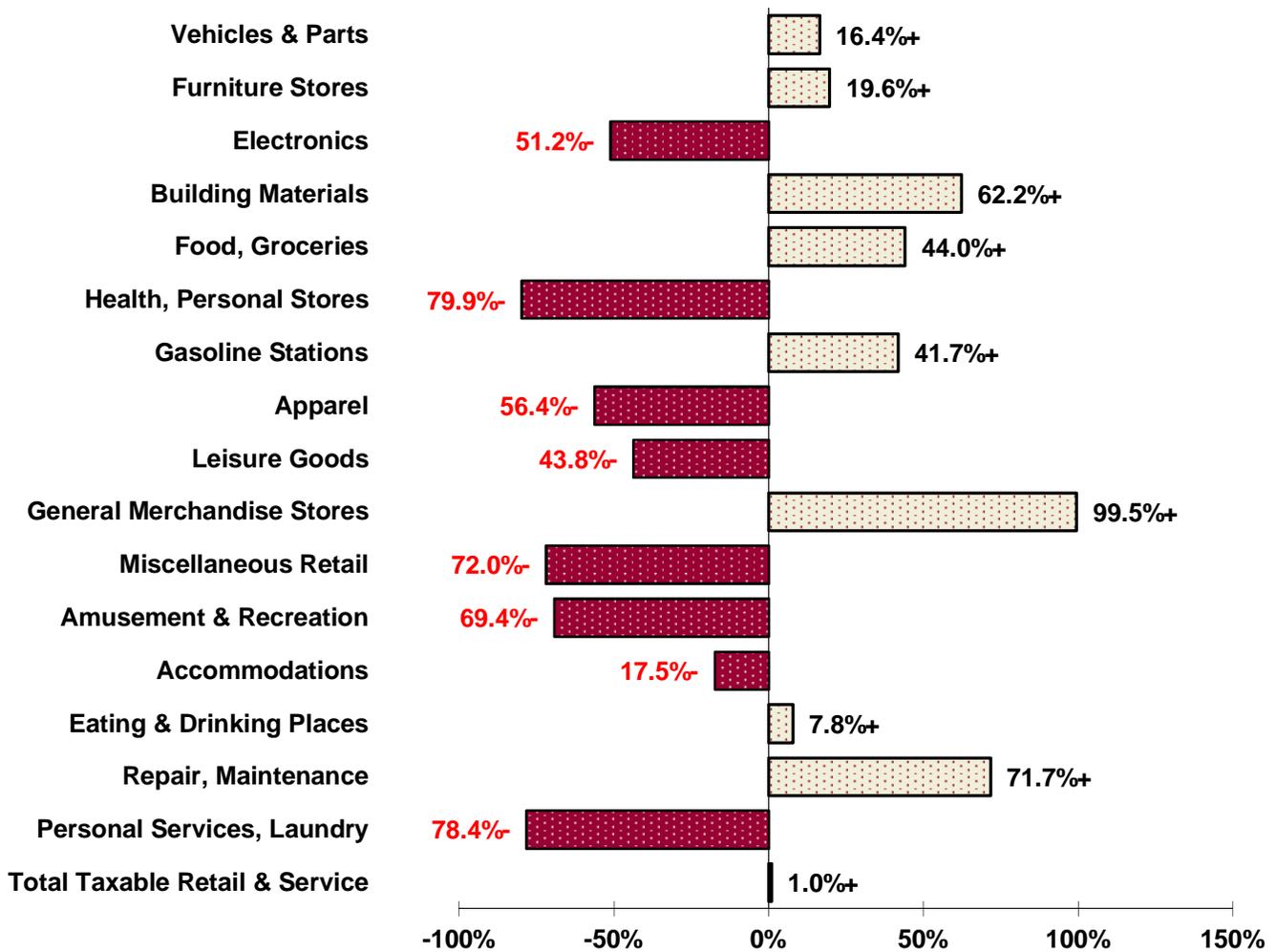
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of Lyon County Retail Trade

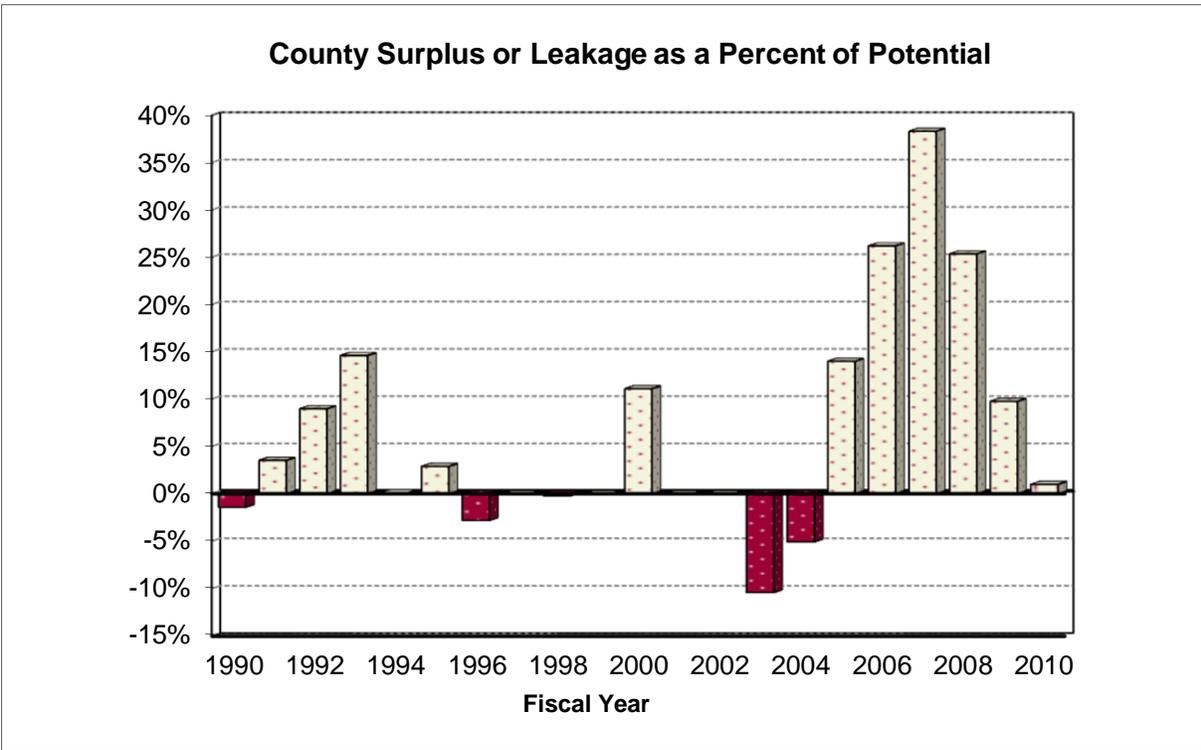
The chart below depicts the percentage amount Lyon County's actual sales were above or below potential sales in 2010 by merchandise group. Of the 16 merchandise categories with reported data, sales in 8 of the categories were above what would be expected based on the county's population and income characteristics as well as statewide spending patterns. The strongest merchandise group by this standard is the General Merchandise Stores category, which has a 99.5 percent surplus. Overall, Lyon County had a retail sales surplus of 1 percent.

It is important to note that variations in a county's relative retail performance may occur for a variety of reasons, some of which are beyond the control of local policy. Proximity to larger population centers and transportation patterns, as well as the individual retailer's management and marketing, can cause the retail sales of a particular county to deviate substantially from potential sales. It is important that decision-makers consider these influences when constructing policies, plans, or projects.

Percentage Above or Below Potential Sales, 2010



Lyon County Retail Trade Surplus or Leakage



| Fiscal Year | Population Estimate | Index of Income | Potential Sales (in millions) | Actual Sales (in millions) | Surplus or Leakage (in millions) | Surplus or Leakage as % of Potential | Trade Area Population Gain or Loss |
|-------------|---------------------|-----------------|-------------------------------|----------------------------|----------------------------------|--------------------------------------|------------------------------------|
| 1990 | 24,789 | 0.83 | \$90.9 | \$89.6 | -\$1.3 | -1.4% | -352 |
| 1991 | 24,663 | 0.84 | \$91.0 | \$94.2 | \$3.2 | +3.5% | +866 |
| 1992 | 24,641 | 0.86 | \$102.0 | \$111.2 | \$9.2 | +9.0% | +2,210 |
| 1993 | 24,765 | 0.83 | \$103.0 | \$118.1 | \$15.0 | +14.6% | +3,614 |
| 1994 | 24,960 | 0.86 | \$117.4 | \$117.5 | \$0.1 | +0.1% | +25 |
| 1995 | 24,925 | 0.83 | \$118.1 | \$121.5 | \$3.4 | +2.9% | +717 |
| 1996 | 24,605 | 0.89 | \$147.4 | \$143.3 | -\$4.1 | -2.8% | -691 |
| 1997 | 24,444 | 0.86 | NA | NA | NA | NA | NA |
| 1998 | 24,398 | 0.88 | \$148.7 | \$148.4 | -\$0.3 | -0.2% | -55 |
| 1999 | 24,256 | 0.87 | NA | NA | NA | NA | NA |
| 2000 | 25,425 | 0.81 | \$156.3 | \$173.7 | \$17.3 | +11.1% | +2,817 |
| 2001 | 25,407 | 0.82 | NA | NA | NA | NA | NA |
| 2002 | 25,118 | 0.83 | NA | NA | NA | NA | NA |
| 2003 | 24,819 | 0.82 | \$181.9 | \$163.0 | -\$18.9 | -10.4% | -2,583 |
| 2004 | 24,703 | 0.83 | \$189.0 | \$179.5 | -\$9.6 | -5.1% | -1,251 |
| 2005 | 24,472 | 0.86 | \$200.4 | \$228.4 | \$28.0 | +14.0% | +3,421 |
| 2006 | 24,640 | 0.83 | \$197.4 | \$249.0 | \$51.7 | +26.2% | +6,453 |
| 2007 | 24,695 | 0.84 | \$201.2 | \$278.2 | \$77.0 | +38.3% | +9,459 |
| 2008 | 24,844 | 0.89 | \$211.1 | \$264.5 | \$53.5 | +25.3% | +6,295 |
| 2009 | 25,074 | 0.91 | \$204.9 | \$224.9 | \$20.0 | +9.8% | +2,446 |
| 2010 | 25,865 | 0.86 | \$201.8 | \$203.8 | \$2.0 | +1.0% | +253 |

State of Minnesota Per Capita Taxable Retail Sales & Threshold Levels for Selected Goods and Services 2010

Threshold level refers to the number of people per business, which can be used as a general guide for determining the "critical mass" necessary to support a business. These are broad averages for the state as a whole and do not reflect differences in income, tourism, agglomeration, establishment, etc. Further, the business counts are based on the number of sales tax returns filed and are converted to "full-time equivalents." Multiplying people per business by sales per capita yields average sales per firm. In addition to state averages, averages for the non-metropolitan regions were calculated by excluding the seven county Minneapolis-St. Paul metropolitan region.

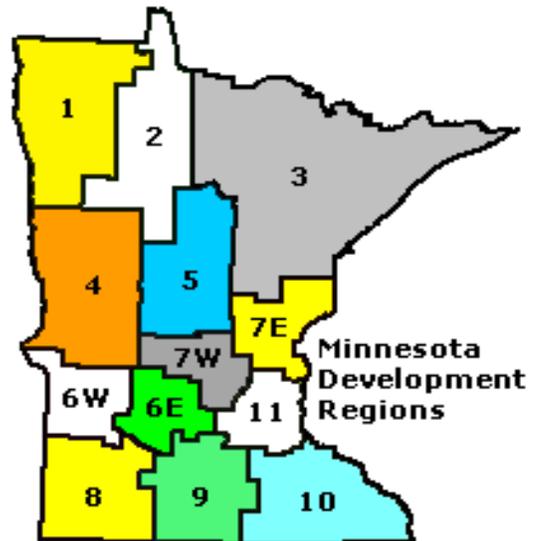
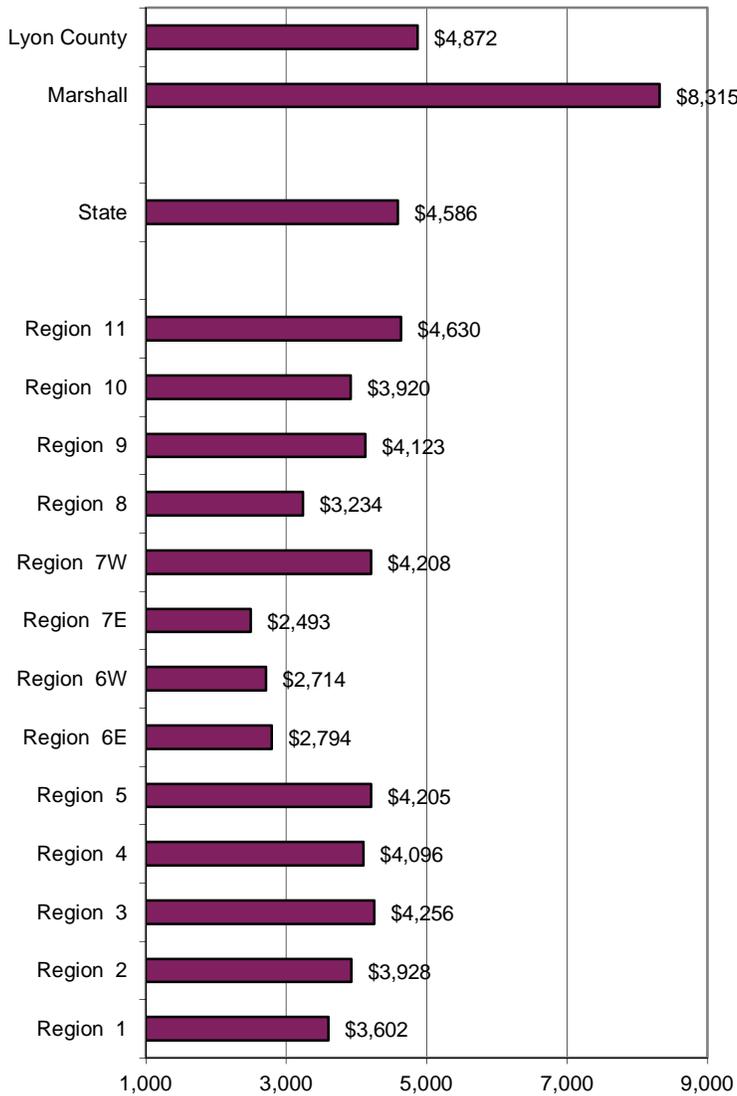
| Business Activity / Store Type | People Per Business | | Sales Per Capita | | |
|--|---------------------|-----------|------------------|------------|------------|
| | State | Non-Metro | State | Non-Metro | Marshall |
| RETAIL TRADE | | | | | |
| 441 Vehicles, Parts | 1,791 | 1,404 | \$354.67 | \$343.35 | \$635.89 |
| 442 Furniture Stores | 2,359 | 2,719 | \$222.17 | \$155.34 | \$416.32 |
| 443 Electronics | 2,949 | 3,879 | \$324.51 | \$138.07 | \$210.10 |
| 444 Building Materials | 2,146 | 1,636 | \$821.91 | \$864.05 | \$1,883.77 |
| 445 Food and Beverage Stores | 1,478 | 1,324 | \$577.29 | \$489.86 | \$1,174.44 |
| 446 Health, Personal Stores | 3,050 | 3,585 | \$110.59 | \$62.66 | \$32.95 |
| 447 Gasoline Stations | 2,357 | 1,857 | \$174.64 | \$205.85 | \$197.87 |
| 448 Clothing & Accessory Stores | 1,361 | 1,759 | \$170.58 | \$81.05 | \$121.28 |
| 451 Leisure Goods | 1,211 | 1,164 | \$241.49 | \$159.78 | \$214.00 |
| 452 General Merchandise | 4,650 | 3,704 | \$1,020.65 | \$1,050.20 | \$3,277.38 |
| 453 Miscellaneous Merchandise | 364 | 347 | \$296.71 | \$225.82 | \$104.09 |
| 454 Non-store Retail | 772 | 880 | \$270.53 | \$74.26 | \$46.83 |
| Retail Total | | | \$4,585.73 | \$3,850.29 | \$8,314.90 |
| INFORMATION | | | | | |
| 511 Publishing Industry | 6,782 | 19,964 | \$25.80 | \$0.81 | |
| 512 Movie & Recording Industry | 12,466 | 50,113 | \$30.16 | \$9.12 | |
| 515 Broadcasting | 33,826 | 98,222 | \$101.39 | \$3.20 | |
| 516 Info -Internet Publ/Brcst | 115,449 | NA | \$0.13 | NA | |
| 517 Telecommunications | 5,954 | 11,806 | \$761.02 | \$246.80 | |
| 518 Internet Service | 7,275 | 35,588 | \$74.49 | \$1.19 | |
| 519 Other Information Services | 3,485 | 5,073 | \$158.59 | \$34.22 | |
| FINANCE AND INSURANCE | | | | | |
| 522 Credit Intermediation | 6,548 | 7,870 | \$27.72 | \$4.95 | |
| 523 Securities, Commodities | 21,074 | 116,931 | \$2.93 | \$0.23 | |
| 524 Insurance Carriers | 9,709 | 28,889 | \$2.13 | \$0.38 | |
| 525 Funds, Trusts | 118,015 | NA | \$4.21 | NA | |
| REAL ESTATE AND RENTAL AND LEASING | | | | | |
| 531 Real Estate | 2,874 | 4,713 | \$31.24 | \$18.90 | |
| 532 Rental, Leasing Services | 2,637 | 3,738 | \$240.34 | \$55.14 | |
| 533 Lessors Nonfinancial Assets | 379,333 | NA | \$0.36 | NA | |
| PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES | | | | | |
| 541 Prof, Scientific, Technical Services | 438 | 759 | \$231.93 | \$69.21 | |
| 551 Mgmt Of Companies | 22,990 | 144,444 | \$28.32 | \$0.48 | |
| ADMINISTRATIVE & SUPPORT; WASTE MGMT & REMEDIATION SVCS | | | | | |
| 561 Admin, Support Services | 507 | 589 | \$16.89 | \$115.63 | |
| 562 Waste Mgmt, Remediation | 11,934 | 12,856 | \$14.02 | \$0.80 | |
| EDUCATIONAL SVCS; HEALTH & SOCIAL ASSISTANCE | | | | | |
| 611 Educational Services | 4,208 | 5,645 | \$16.89 | \$14.21 | |
| 621 Health -Ambulatory Care | 1,169 | 1,477 | \$14.02 | \$9.19 | |
| 622 Health -Hospitals | 38,483 | 144,444 | \$13.46 | \$8.03 | |
| 623 Health -Nursing,Home Care | 13,310 | 14,704 | \$1.70 | \$1.42 | |
| 624 Health -Social Assistance | 14,238 | 27,590 | \$2.49 | \$2.10 | |
| ARTS, ENTERTAINMENT & RECREATION | | | | | |
| 711 Performing Art, Spectator Sports | 2,628 | 3,980 | \$59.10 | \$8.35 | |
| 712 Museums, Historical Sites | 31,239 | 79,211 | \$4.85 | \$0.49 | |
| 713 Amusement, Gambling, Recr | 2,245 | 1,896 | \$273.86 | \$131.70 | |
| ACCOMMODATION & FOOD SERVICES | | | | | |
| 721 Accommodation | 2,080 | 1,173 | \$304.41 | \$288.52 | \$340.78 |
| 722 Food Services, Drinking Places | 465 | 451 | \$1,280.87 | \$954.35 | \$1,794.56 |
| OTHER SERVICES | | | | | |
| 811 Repair, Maintenance | 576 | 430 | \$208.66 | \$211.66 | |
| 812 Personal, Laundry Service | 602 | 528 | \$143.61 | \$49.56 | |
| TOTAL RETAIL AND SERVICES | | | \$9,021.11 | \$6,190.40 | |

Compare the Community to the Region

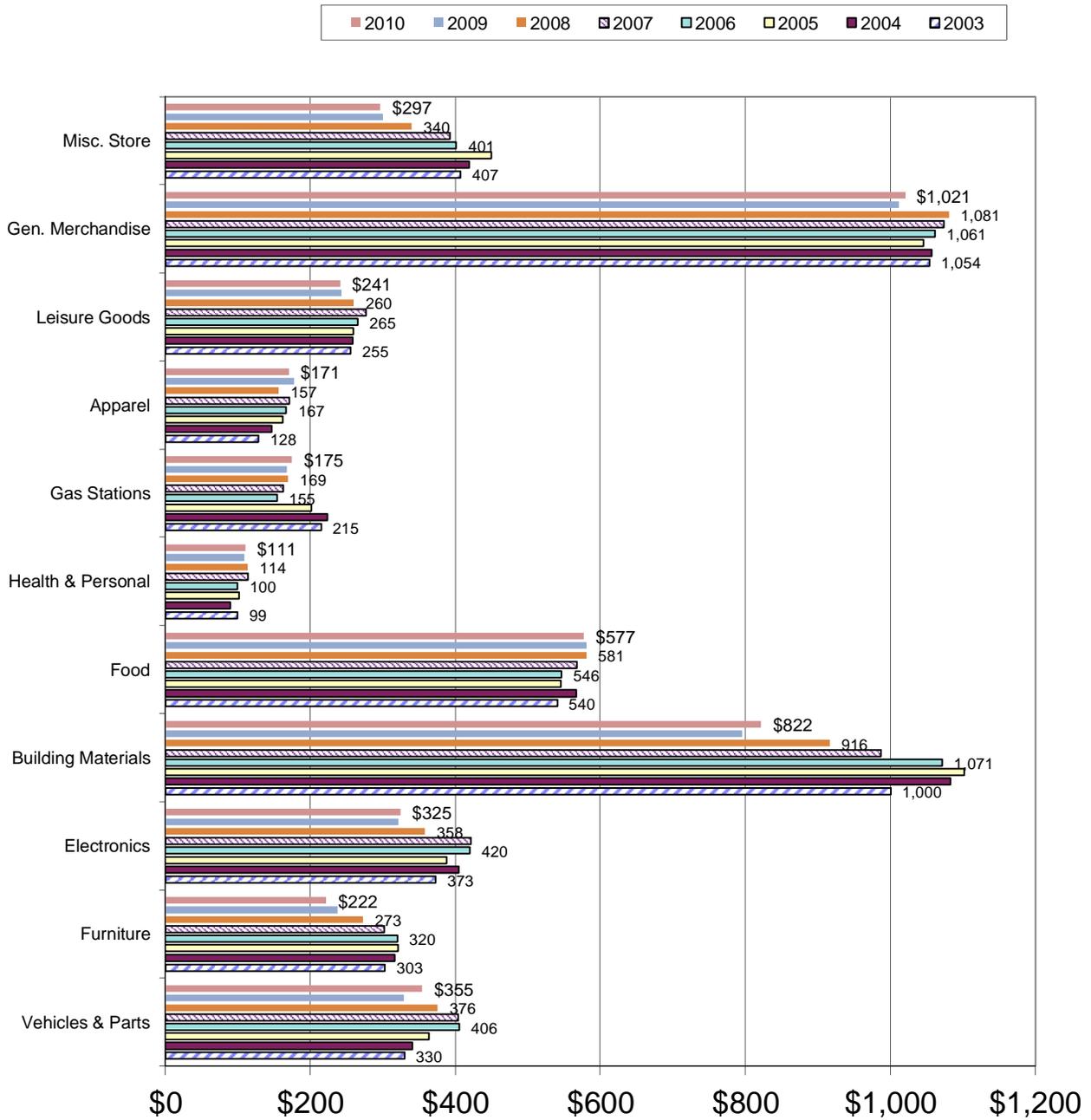
Marshall and Lyon County

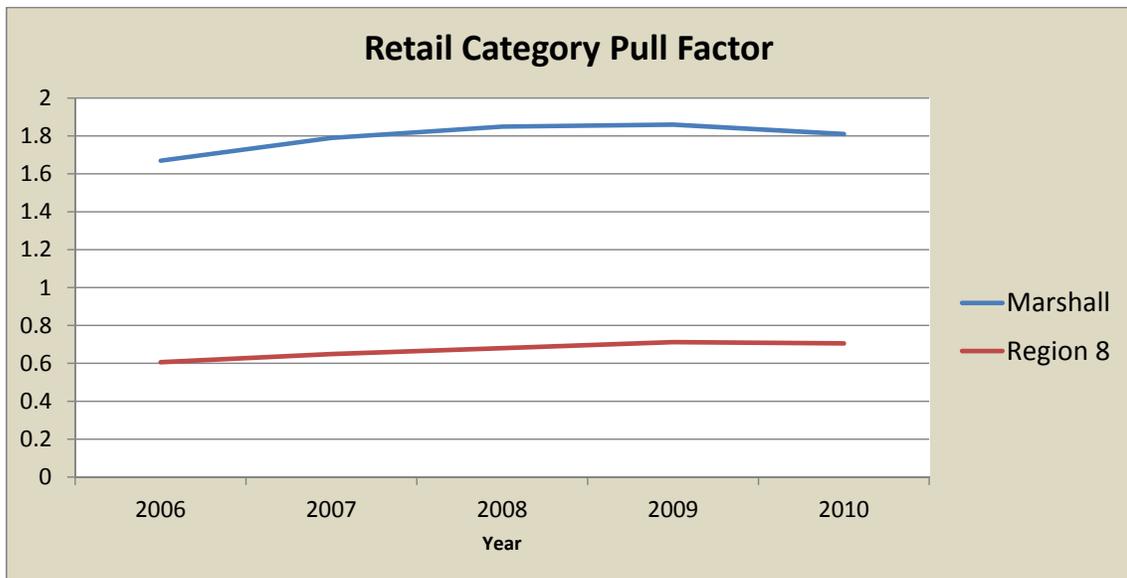
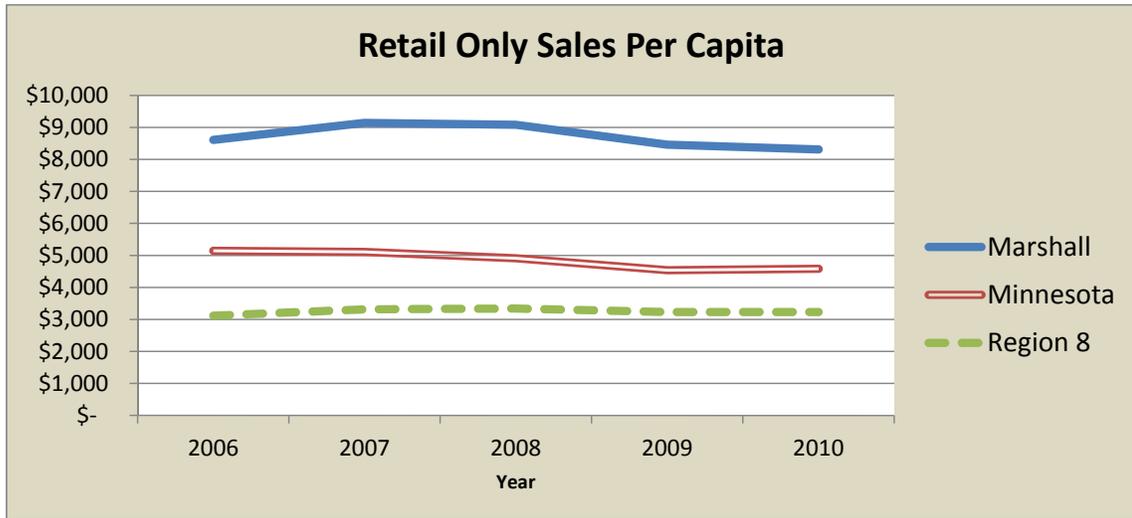
On other pages of this report we compared communities using a combination of retail sectors and service sectors. The information on this page only includes businesses in Retail Trade and does not include service sectors. The retail trade sectors include the following: building materials, motor vehicles & parts, apparel, food stores, electronics, convenience stores, leisure goods, health stores, furniture, general merchandise, non-store retail, and miscellaneous stores.

2010 Retail Sales per capita



Minnesota Taxable Sales per Capita Trend





Retail Sales Per Capita

| | 2006 | 2007 | 2008 | 2009 | 2010 |
|-----------|----------|----------|----------|----------|----------|
| Marshall | \$ 8,612 | \$ 9,146 | \$ 9,086 | \$ 8,466 | \$ 8,315 |
| Minnesota | \$ 5,148 | \$ 5,111 | \$ 4,913 | \$ 4,542 | \$ 4,586 |
| Region 8 | \$ 3,120 | \$ 3,319 | \$ 3,340 | \$ 3,232 | \$ 3,234 |

Retail Only Pull Factor

| | 2006 | 2007 | 2008 | 2009 | 2010 |
|----------|------|------|------|------|------|
| Marshall | 1.67 | 1.79 | 1.85 | 1.86 | 1.81 |
| Region 8 | 0.61 | 0.65 | 0.68 | 0.71 | 0.71 |