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2010 Retail Trade Analysis Oakdale & Washington County

A TOOL USED TO MEASURE THE ECONOMIC HEALTH OF THE LOCAL RETAIL ECONOMY

Authored by Bruce W. Schwartau



PROGRAM SPONSORS: THE CITY OF OAKDALE

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June 15, 2012

Authored by Bruce W. Schwartau

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TABLE OF CONTENTS

<u>Community</u>	<u>Page</u>
Oakdale & Washington County	7
Woodbury	34
Maplewood	47
North St. Paul	60
White Bear Lake	73
Lake Elmo	86
Stillwater	99



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The University of Minnesota Extension has developed this retail trade analysis program to assist in the economic development of Minnesota towns and cities. These reports are available for all Minnesota counties, for most cities above 5,000 population and for a few cities smaller than 5,000 population. The retail sector of each jurisdiction can be evaluated by comparing its trends to those of other similar jurisdictions. Business people and economic development officials can use measures such as pull factors and leakages to determine the need and feasibility of new retail businesses.

DATA SOURCES

Most of the data in the analysis are based on annual reports of Minnesota retail and use tax, published by the Minnesota Department of Revenue. The Department of Revenue published an annual report of sales and use tax by jurisdiction until 1996, at which time the reports were released biennially due to budget constraints. This analysis uses the available reports from 1990-1996, 1998, 2000, and 2003 through 2010. The reports interpolate data for the years in which data are not available. (See

http://taxes.state.mn.us/legal_policy/pages/research_reports_sales_use_statistics_main.aspx) The income data in this report are obtained from reports by Bureau of Economic Analysis (BEA). (See <http://www.bea.gov/regional/reis>) Population data are derived from the U.S. Census. (See <http://www.census.gov/popest/>)

Sales and use tax permit holders file returns and remit taxes on a monthly, quarterly or annual basis. Large businesses such as discount department stores whose tax is more than \$500 per month are required to file on a monthly basis, while medium-sized businesses whose sales tax collections are less than \$500 per month, are required to file on a quarterly basis and small businesses with sales tax collections less than \$100 per month would most likely file on an annual basis.

DEFINITION OF TERMS

Gross Sales

Gross sales include taxable sales and exempt sales for businesses holding sales and use tax permits. This is the most inclusive indicator of business activity for the reporting jurisdictions but it can be misleading when used in comparisons. At times commodity items (like gasoline) that are not taxable can have large price variations, creating huge swings in gross sales.

Taxable Sales

Taxable sales are the amount of sales subject to sales tax. Taxable sales exclude exempt items, items sold for resale, items sold for exempt purposes and items sold to exempt organizations. For more information on what is taxed in Minnesota, see "Minnesota Sales and Use Tax Instruction Booklet" available on the web at http://www.taxes.state.mn.us/sales/Documents/sales_tax_booklet.pdf)

Current and Constant Dollar Sales

Current dollar (or "nominal dollar") sales are sales as reported by the state. No adjustment has been made for price inflation. In general this measure of sales is not satisfactory for comparisons over long periods of time since it does not account for changes in population, inflation, or the state's economy. Constant dollar (or "real dollar") sales reflect changes in price inflation by adjusting current dollar sales with the Consumer Price Index (CPI). Constant dollar sales indicate the real sales

level with respect to a base year. This is a more realistic method of evaluating sales over time than current dollar comparisons, but still does not take into consideration changes in population or changes in the state's economy.

Number of Businesses

The number of sales and use tax permit holders who filed one or more tax returns for the year are reported as the number of businesses.

Reporting Period

The reporting periods though 2005 in this report are calendar years. For example, the sales reported for the year 2000 are for the period, January 1, 2000 to December 31, 2000. The Sales and Use Tax Statistics report for 2006 and beyond uses a slightly different methodology than in previous years. Rather than basing the report on the year in which sales were made (as was true in earlier reports), the 2006 report is based on when returns were processed. To best approximate the economic activity for calendar year 2010, this report includes all returns processed from February 2010 through January 2011. Returns are included in the report regardless of the date of sale.

Per Capita Sales

Per capita (or “per person”) sales are calculated by dividing current dollar sales by the population estimate. In areas where population is subject to substantial change, this is a more satisfactory measure of sales activity than sales alone. However, it still does not reflect changes in the state economy.

Number of Businesses

The number of sales and use tax permit holders who filed one or more tax returns for the year are reported as the number of businesses.

Pull Factor

The pull factor was developed by Dr. Ken Stone, an economist from Iowa State University Extension Service, to provide a precise measure of sales activity in a locality. It is derived by dividing the per capita current dollar sales of a city or county by the per capita sales for the state. For example, if a city's per capita sales are \$20,000 per year and the state per capita sales are \$10,000 per year, the pull factor is 2.0 ($\$20,000 \div \$10,000$). The interpretation is that the city is selling to 200 percent of the city population.

Pull factors are good measures of sales activity because they reflect changes in population, inflation, and the state economy. Pull factors are available through the University of Minnesota Extension for total taxable sales for all cities with reported sales (generally, cities with a population of 5,000 or more) since 1990. The pull factors listed in this report are not adjusted for differing income levels in different communities; they are simply the ratio of local per person sales to the state average. Income levels are accounted for in the expected sales and potential sales formulas, described below.

Typical Pull Factor

The typical pull factor is a pull factor that represents the “norm” for cities within a population group. It is an average for cities within a population group excluding some of the outliers in the group.

Personal Income

Personal income is defined as the income received by, or on behalf of, all the residents of the county (state) from all sources. Personal income is the estimated sum of wage and salary earnings, supplements to wages and salaries (e.g., contributions to retirement funds, health plans, life insurance policies), proprietors' income, rental income, personal dividend income, personal interest income, and personal current transfer receipts to persons (e.g. receipts of Social Security, disability, worker's compensation, Medicare/Medicaid, food stamps, etc.) less contributions for government social insurance (e.g. Social Security, Medicare). Source is the American Community Survey. www.census.gov/acs

Index of Income

This index provides a relative measure of income, calculated by dividing local per capita income by state per capita income. The base is 1.00. For example, an index of income of 1.20 indicates that per capita income in the area is 20 percent above the state average.

Expected Sales

Expected sales are a retail performance benchmark. It is an estimate of the sales level a town would achieve if it were performing on par with Minnesota towns of a similar size. In addition to population and income variables, expected sales incorporate the typical strength of comparable communities via the typical pull factor. Expected sales are the product of city population, state per capita sales, the index of income and the typical pull factor. For example, if a city has a population of 5,000, the state per capita sales are \$9,000, the typical pull factor is 1.30, and the index of income is 1.03, expected sales are approximately \$60 million per year ($5,000 \times \$9,000 \times 1.30 \times 1.03$). This provides a means of comparing what is expected for a city of a certain size to what is actually happening.

Potential Sales

Potential sales are an estimate of the amount of money that is spent on retail goods and services by residents of a county. It is the product of county population, state per capita sales and the index of income. The potential sales concept for counties is similar to the expected sales calculations for cities. However, potential sales do not utilize a measure of average pulling power (like the typical pull factor that is used in the expected sales equation). Since a county is a relatively large region within which retail business takes place, counties are compared without adjustments for trade area size.

Variance between Actual and Expected Sales (Surplus or Leakage)

The variance between actual and expected sales is how much retail sales differ from the "norm" (i.e., the amount above or below the standard established by the expected sales formula). When actual sales exceed expected sales, we say the city has a "surplus" of retail sales. When actual sales fall short of expected sales, we say the city has a retail sales "leakage". The set of similarly-sized cities in Minnesota is the "peer group" to which the comparison is being made. Discrepancies between expected and actual sales occur for a variety of reasons.

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Trade Area Population Gain or Loss

The trade area population gain or loss translates the percentage amount of surplus or leakage of retail sales into an estimate of the number of customers gained or lost in the trade area. It is calculated by multiplying the percent surplus or leakage by the population estimate for the city or county. For example, if a city with 10,000 residents had a retail sales surplus of 20%, the trade area population gain would be 2,000. Adding this number to the city's population gives an estimate of the population size of the city's trade area.

CAUTIONS

Gross Sales

Gross sales are a comprehensive measure of business activity, but readers should be aware that the numbers in this report are self-reported by holders of sales and use tax reports. Furthermore, the gross sales are not audited by the State of Minnesota. It is believed that the gross sales figures are generally reliable, but there is the possibility of distortions, especially in smaller cities where misreporting may have occurred.

Misclassification

Holders of sales and use tax permits select the North American Industry Classification System (NAICS) category that best fits their business. Regardless of who makes this classification, errors are occasionally made. Also, sometimes a business will start out as one type of business, but may evolve over time to a considerably different type of business. Misclassifications can distort sales among business categories, especially in smaller cities. For example, a furniture store that is classified as a general merchandise store, will under-report the sales in the furniture store category and over-report the sales in the general merchandise category.

Suppressed Data

The sales data for merchandise categories that have less than four reporting firms are not reported. This is a measure taken by most states to protect the confidentiality of sales tax permit holders. The sales for suppressed categories are placed into the miscellaneous category and are included in total sales.

Consolidated Reporting

Vendors doing business at more than one location in Minnesota have the option of filing a separate return for each location or filing one consolidated return for all locations. The consolidated return shows, for each business establishment, the sales made, tax due and location by city and county. Data for the establishments of consolidated filers are combined with data for single-location filers to produce the figures in this report. Occasionally consolidated reports may not be properly deconstructed and all the sales for a company may be reported for one town or city. Whenever misreporting is discovered, contacts are made with the Minnesota Revenue Department to clarify the situation.

Changes between 2000 and 2003

For fiscal year 2003, the Minnesota Department of Revenue implemented two major changes to improve their reporting of sales and use tax data. First, they adopted a geo-coding system, which accurately identifies the location of all business reporting sales and use tax to the state rather than relying on the businesses' postal addresses. One effect of this change is a movement of sales between neighboring cities (and in some cases, counties) in the year 2003. Thus, in several of the suburbs of Minneapolis and St. Paul and in cities such as Hermantown, which is adjacent to Duluth, the data show large increases in retail sales between 2000 and 2003, a substantial portion of which is due to the re-coding of business location and not to actual growth in sales.

The second change implemented by the Department of Revenue in 2003 was a shift from the Standard Industrial Classification system (SIC codes) to the North American Industry Classification System (NAICS codes). This switch does affect the comparability of the data series prior to 2000 with that of 2003 (and beyond), especially for merchandise categories. Overall retail and services sales are highly comparable over time. In many cases, the merchandise categories for the data prior to 2003 are very closely related to the new categories. For example, approximately 97% of the 2003 statewide sales in the general merchandise category were accounted for by firms also classified as general merchandise under the SIC system. In other cases, the correspondence is less straightforward. For example, only 56% of 2003 statewide sales in the Food and Beverage store category were accounted for by firms classified as Food Stores under the older classification system; 41% of 2003 Food store sales were accounted for by firms previously categorized as Miscellaneous Retail.

The NAICS system does provide greater detail and introduces some new sectors, such as Retail Electronics. Over time, these changes will improve the information available for retail trade analysis. For additional information, please see http://taxes.state.mn.us/legal_policy/pages/other_supporting_content_salesuse_%202003_statistics_introduction.aspx

Oakdale Retail Trade Overview

Total Taxable and Gross Retail Sales

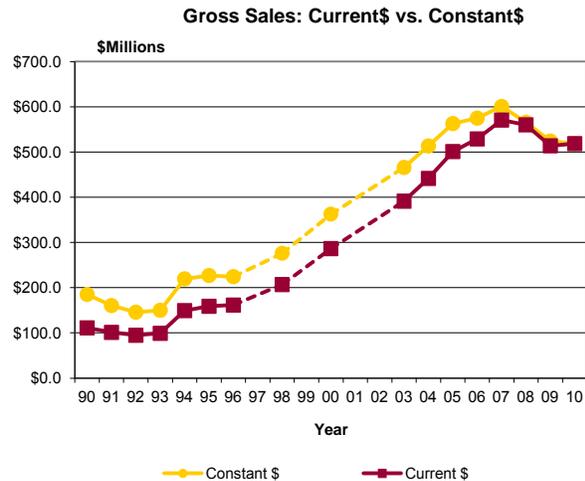
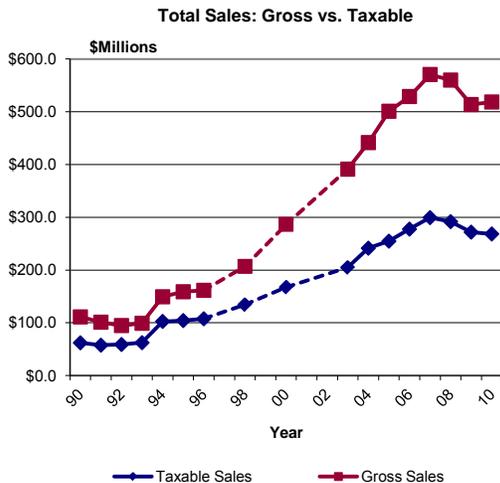
The table below presents gross and taxable retail and services sales for Oakdale from 1990 through 2010. Without inflation adjustments, taxable sales in Oakdale increased 31 percent from 2003 to 2010, while the number of firms rose 12.6 percent. Statewide, taxable sales increased 6.1 percent over the 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 in 2010. For example, in 1990, taxable sales in Oakdale totaled \$62.03 million, an amount worth \$103.39 million in 2010 dollars. In constant dollars, gross sales grew 11.3 percent between 2003 and 2010. Constant dollar taxable sales increased 10 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	18,669	\$111.12	\$62.03	\$185.20	\$103.39	200	\$3,323	0.76
1991	20,128	\$101.11	\$57.53	\$160.49	\$91.32	211	\$2,858	0.65
1992	21,372	\$94.75	\$58.85	\$145.76	\$90.54	191	\$2,754	0.57
1993	22,985	\$99.04	\$62.27	\$150.07	\$94.35	195	\$2,709	0.54
1994	24,354	\$149.28	\$102.59	\$219.53	\$150.87	231	\$4,212	0.77
1995	25,189	\$158.84	\$104.18	\$226.91	\$148.83	235	\$4,136	0.73
1996	25,910	\$161.51	\$107.59	\$224.32	\$149.44	261	\$4,153	0.62
1997	26,432	NA	NA	NA	NA	NA	\$0	NA
1998	26,937	\$206.95	\$134.45	\$275.93	\$179.26	276	\$4,991	0.72
1999	27,263	NA	NA	NA	NA	NA	\$0	NA
2000	26,653	\$286.37	\$167.71	\$362.49	\$212.29	277	\$6,292	0.83
2001	27,021	NA	NA	NA	NA	NA	\$0	NA
2002	27,587	NA	NA	NA	NA	NA	\$0	NA
2003	27,673	\$391.26	\$204.89	\$465.79	\$243.91	349	\$7,404	0.83
2004	27,571	\$441.56	\$241.42	\$513.45	\$280.72	362	\$8,756	0.95
2005	27,355	\$500.99	\$254.73	\$562.91	\$286.21	399	\$9,312	0.98
2006	27,206	\$528.93	\$277.59	\$574.92	\$301.73	387	\$10,203	1.06
2007	27,119	\$570.66	\$299.36	\$600.69	\$315.11	399	\$11,039	1.14
2008	27,181	\$560.06	\$291.77	\$565.72	\$294.72	392	\$10,734	1.12
2009	27,299	\$513.71	\$271.85	\$524.19	\$277.39	399	\$9,958	1.11
2010	27,378	\$518.53	\$268.39	\$518.53	\$268.39	393	\$9,803	1.09
7 yr Change '03 to '10	-1.1%	32.5%	31.0%	11.3%	10.0%	12.6%	32.4%	31.0%
3 yr Change '07 to '10	1.0%	-9.1%	-10.3%	-13.7%	-14.8%	-1.5%	-11.2%	-4.3%

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

Oakdale: Total Retail Sales

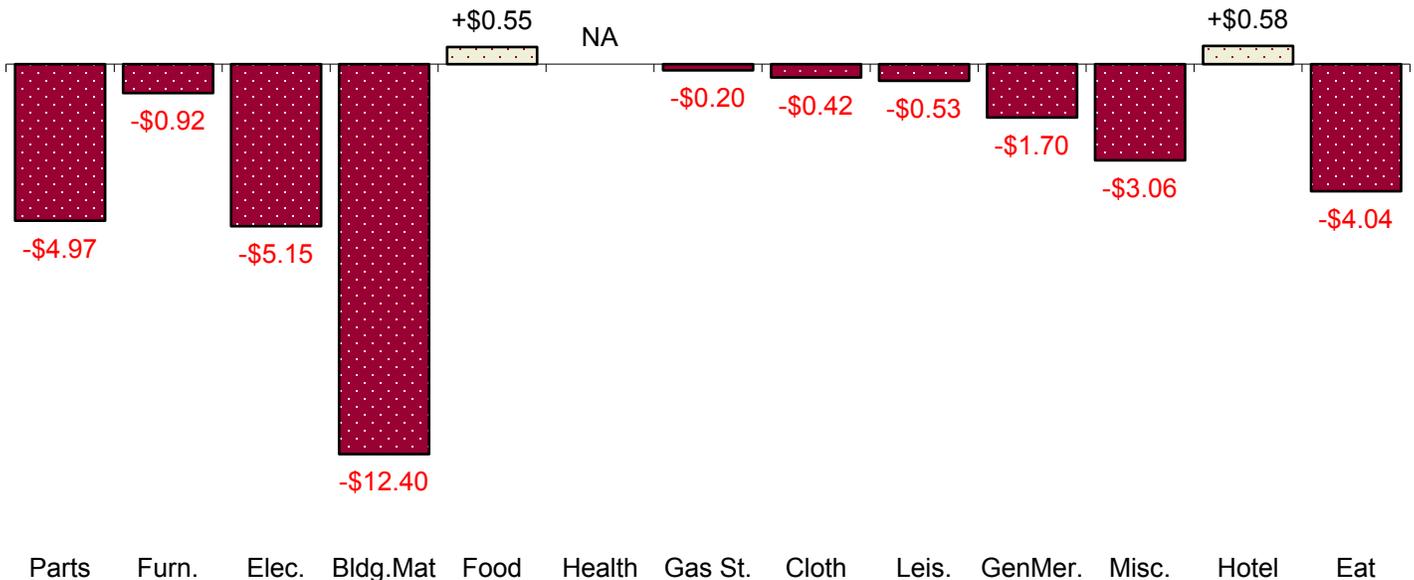


Oakdale Components of Change, 2007 to 2010

Category	Taxable Sales 2007	Taxable Sales 2010	Dollar Change	Percent Change
Vehicles & Parts	\$13,166,858	\$8,192,014	-\$4,974,844	-37.78%
Furniture Stores	\$7,747,667	\$6,830,149	-\$917,518	-11.84%
Electronics	\$49,048,508	\$43,897,597	-\$5,150,911	-10.50%
Building Materials	\$67,096,423	\$54,700,785	-\$12,395,638	-18.47%
Food, Groceries	\$11,317,875	\$11,863,501	+\$545,626	+4.82%
Health, Personal Stores	NA	\$2,534,690	NA	NA
Gasoline Stations	\$3,479,955	\$3,284,705	-\$195,250	-5.61%
Apparel	\$825,335	\$402,876	-\$422,459	-51.19%
Leisure Goods	\$8,128,607	\$7,600,790	-\$527,817	-6.49%
General Merchandise Stores	\$57,692,746	\$55,997,734	-\$1,695,012	-2.94%
Miscellaneous Retail	\$4,635,167	\$1,579,145	-\$3,056,022	-65.93%
Accommodations	\$5,966,486	\$6,546,732	+\$580,246	+9.73%
Eating & Drinking	+\$33,226,266	+\$29,187,368	-\$4,038,898	-12.16%
Total Retail and Services Sales	\$299,356,836	\$268,387,887	-\$30,968,949	-10.35%

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 to 2010



Historical Trends By Merchandise Category Oakdale

The following tables and charts depict pull factors in Oakdale 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.

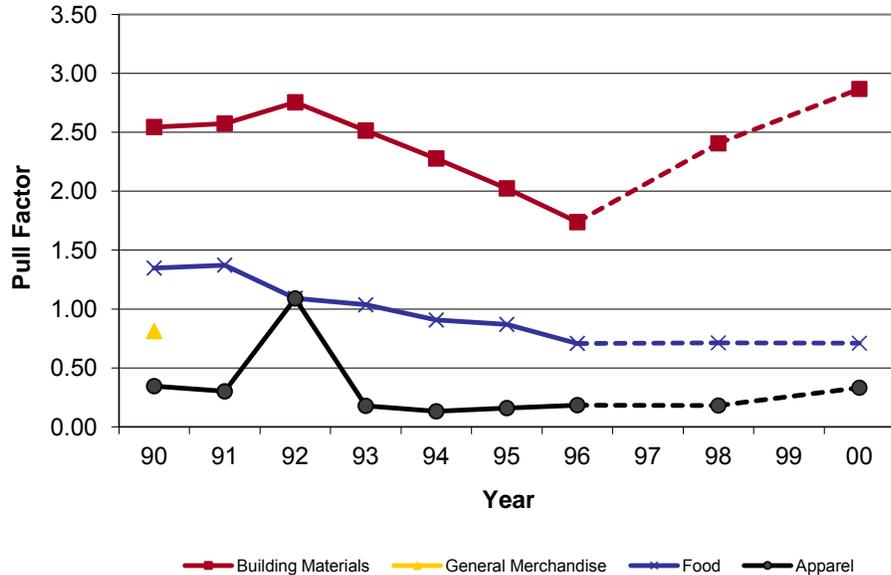
General Merchandise: Includes retail stores which sell a number of lines of merchandise, such as dry goods, apparel and accessories, furniture and home furnishings, small wares, hardware, and food. The stores included in this group are known as department stores, variety stores, general merchandise stores, 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
Oakdale, 1990-2000

Year	Building Materials	General Merchandise	Food	Apparel
1990	2.54	0.81	1.35	0.35
1991	2.57	NA	1.37	0.30
1992	2.75	NA	1.09	1.09
1993	2.51	NA	1.04	0.18
1994	2.28	NA	0.91	0.13
1995	2.02	NA	0.87	0.16
1996	1.74	NA	0.71	0.18
1997	NA	NA	NA	NA
1998	2.41	NA	0.71	0.18
1999	NA	NA	NA	NA
2000	2.87	NA	0.71	0.33

% Change, '90 to '00 12.69% NA -47.27% -3.71%

% Change, '98 to '00 19.15% NA -0.32% 82.72%

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 Oakdale

The following tables and charts depict pull factors in Oakdale 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.

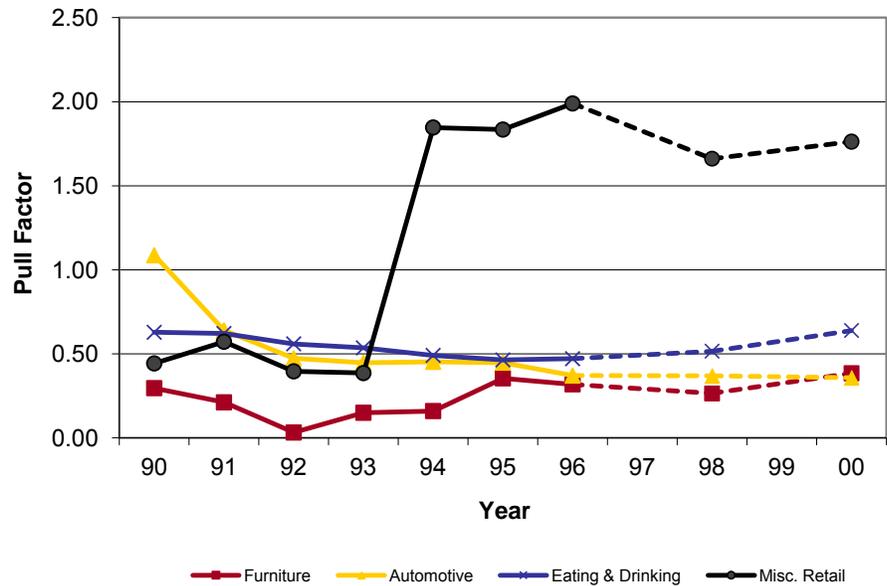
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

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 Oakdale, 1990-2000

Year	Furniture	Automotive	Eating & Drinking	Misc. Retail
1990	0.30	1.09	0.63	0.44
1991	0.21	0.64	0.62	0.57
1992	0.03	0.47	0.56	0.40
1993	0.15	0.45	0.54	0.39
1994	0.16	0.45	0.49	1.85
1995	0.35	0.45	0.46	1.83
1996	0.32	0.37	0.47	1.99
1997	NA	NA	NA	NA
1998	0.27	0.37	0.52	1.66
1999	NA	NA	NA	NA
2000	0.38	0.36	0.64	1.76

% Change, '90 to '00 29.66% -67.07% 1.70% 297.31%

% Change, '98 to '00 45.02% -3.16% 23.79% 6.08%

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 Oakdale

The following tables and charts depict pull factors in Oakdale 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.

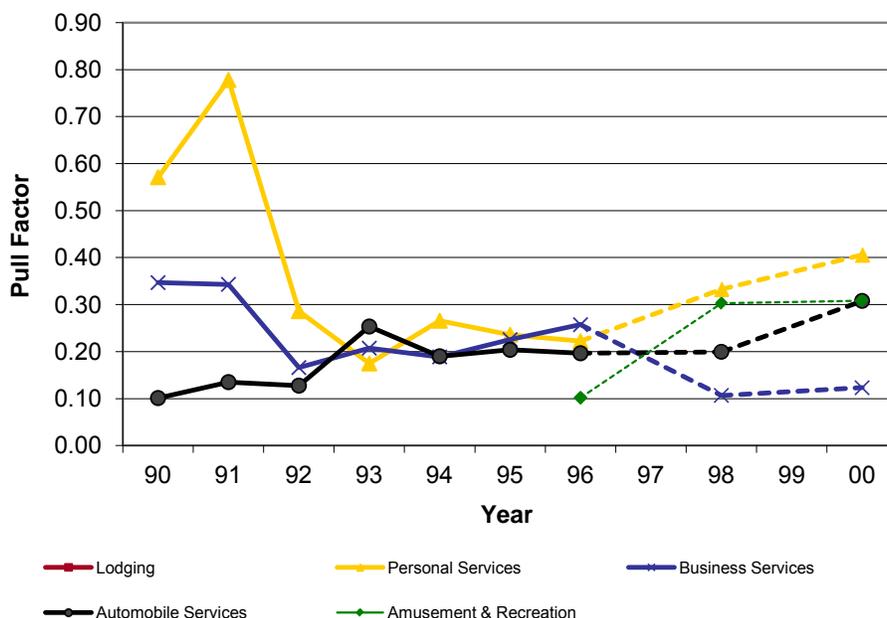
Business Services: Includes establishments primarily engaged in providing services, not elsewhere classified, to business establishments on a contract or fee basis.

Automobile Services: Includes establishments primarily engaged in 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.

*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 Oakdale, 1990-2000

Year	Lodging	Personal Services	Business Services	Automobile Services	Amusement & Recreation
1990	NA	0.57	0.35	0.10	NA
1991	NA	0.78	0.34	0.13	NA
1992	NA	0.29	0.17	0.13	NA
1993	NA	0.17	0.21	0.25	NA
1994	NA	0.27	0.19	0.19	NA
1995	NA	0.24	0.23	0.20	NA
1996	NA	0.22	0.26	0.20	0.10
1997	NA	NA	NA	NA	NA
1998	NA	0.33	0.11	0.20	0.30
1999	NA	NA	NA	NA	NA
2000	NA	0.41	0.12	0.31	0.31
<hr/>					
% Change, '90 to '00	NA	-29.01%	-64.47%	204.18%	NA
% Change, '98 to '00	NA	22.02%	15.61%	54.35%	1.81%

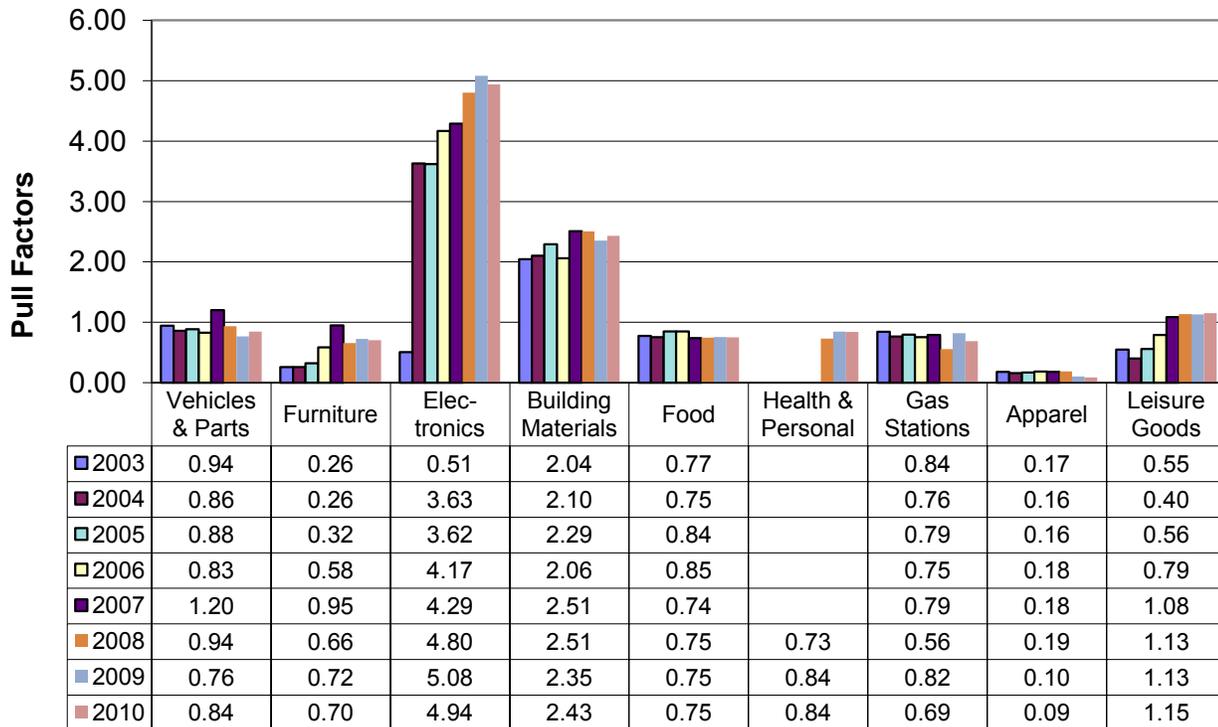
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Recent Trends By Merchandise Category

Oakdale

The following tables and charts depict pull factors in Oakdale 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.

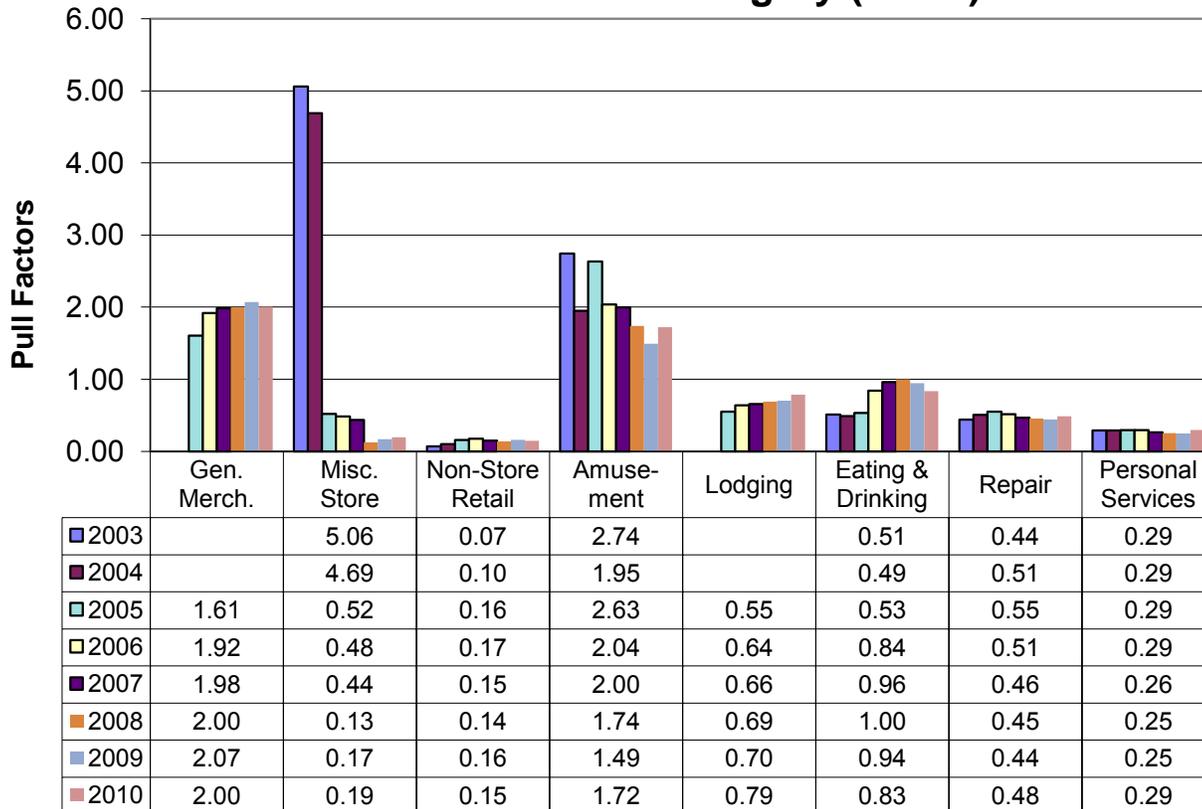
*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Recent Trends By Merchandise Category

Oakdale

The following tables and charts depict pull factors in Oakdale 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.

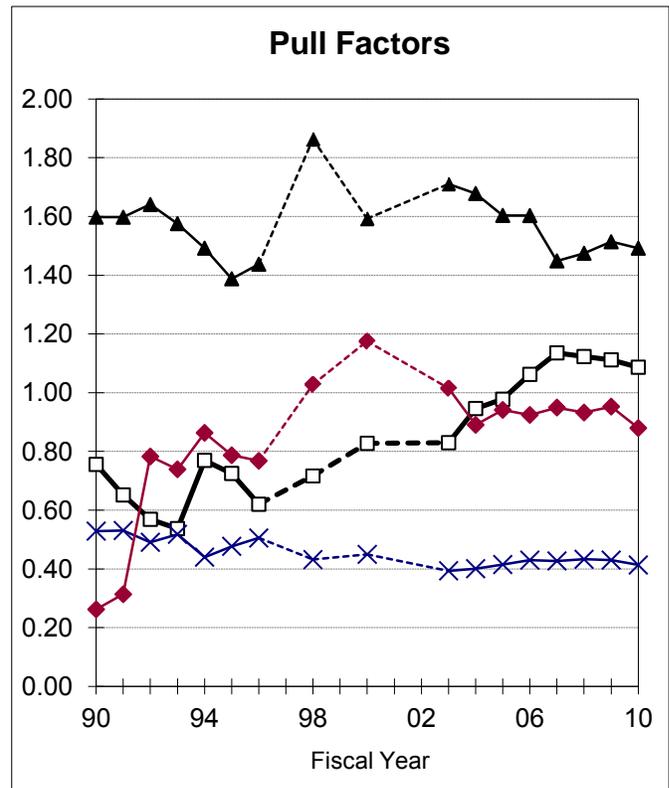
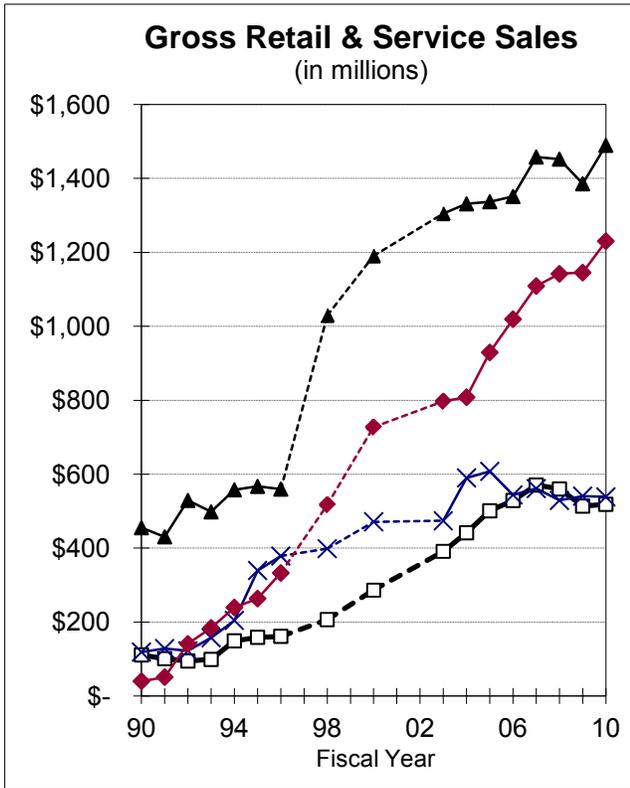
Eating & Drinking: Restaurants, donut shops, coffee house, cafeteria, caterers, taverns, and nightclubs,

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 Oakdale



Oakdale
 South St. Paul
 Maplewood
 Woodbury

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)
Oakdale	27,378	\$518.53	\$268.39	393	\$9,803	1.09
Maplewood	38,018	\$1,489.38	\$511.71	889	\$13,460	1.49
South St. Paul	20,160	\$538.68	\$75.19	256	\$3,730	0.41
Woodbury	61,961	\$1,230.32	\$491.69	1,037	\$7,935	0.88

Trade Area Analysis of Retail Sales

Oakdale

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	\$9.32	\$8.19	-\$1.13	-12.1%	-3,311	11	3.0%
Furniture Stores	\$4.05	\$6.83	+\$2.78	+68.6%	18,782	6	2.5%
Electronics	\$3.29	\$43.90	+\$40.61	+1234.4%	337,951	8	16.1%
Building Materials	\$25.81	\$54.70	+\$28.89	+111.9%	30,644	9	20.1%
Food, Groceries	\$17.35	\$11.86	-\$5.49	-31.6%	-8,663	11	4.4%
Health, Personal Stores	\$3.10	\$2.53	-\$0.56	-18.1%	-4,958	7	0.9%
Gasoline Stations	\$5.07	\$3.28	-\$1.78	-35.2%	-9,633	7	1.2%
Apparel	\$1.35	\$0.40	-\$0.94	-70.1%	-19,180	12	0.1%
Leisure Goods	\$2.39	\$7.60	+\$5.21	+217.7%	59,612	18	2.8%
General Merchandise Stores	\$58.39	\$56.00	-\$2.39	-4.1%	-1,120	6	20.6%
Miscellaneous Retail	\$14.50	\$1.58	-\$12.92	-89.1%	-24,395	37	0.6%
Amusement & Recreation	\$4.45	\$12.92	+\$8.47	+190.6%	52,175	11	4.8%
Accommodations	\$7.63	\$6.55	-\$1.08	-14.2%	-3,881	5	2.4%
Eating & Drinking Places	\$32.94	\$29.19	-\$3.75	-11.4%	-3,119	36	10.7%
Repair, Maintenance	\$4.63	\$2.76	-\$1.87	-40.3%	-11,042	26	1.0%
Personal Services, Laundry	\$2.13	\$1.16	-\$0.97	-45.7%	-12,510	31	0.4%
Total Taxable Retail & Service	\$187.18	\$271.85	+\$84.67	+45.2%	12,385	393	100.0%

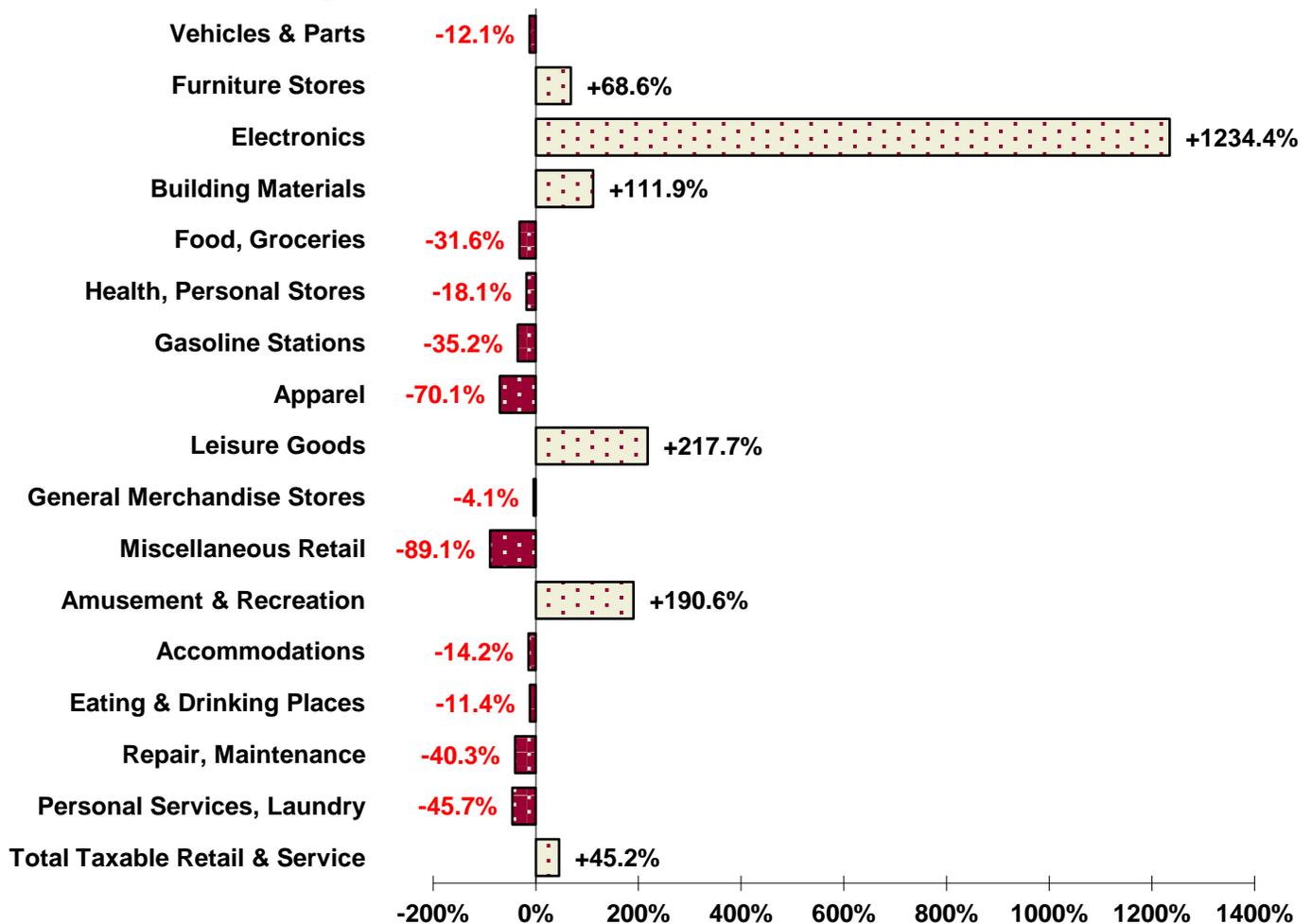
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of Oakdale Retail Trade

The chart below depicts the percentage amount Oakdale's actual sales were above or below expected sales in 2010 by merchandise group. Of the 16 merchandise categories with reported data, sales in 5 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 Electronics category, which has a 1234.4 percent surplus. Overall, Oakdale had a retail sales surplus of 45.2 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 21,800 & 32,800 (Range: Population of Oakdale +/- ~ 20%.) (20 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																		
Andover	30,598	0.17				0.82	0.72	0.49	0.02	0.35		2.55	0.18		0.34	0.69	0.26	0.26
Brooklyn Center	30,104	1.71	0.47	1.49		0.81	0.93	1.10	5.19	0.46	0.93	1.47	0.20	1.38	0.81	0.49	0.15	0.70
Winona	27,592	1.02	0.40	0.56	1.58	1.03	0.78	1.81	0.15	0.42	2.66	0.44	0.26	0.95	1.55	0.96	0.34	1.03
Oakdale	27,378	0.84	1.12	4.94	2.43	0.75	0.84	0.69	0.09	1.15	2.00	0.19	1.72	0.79	0.83	0.48	0.29	1.09
Fridley	27,208	2.00	2.18		2.70	0.66	0.88	1.15	0.02	0.15	2.81	1.63			1.02	1.62	4.92	1.24
Savage	26,911	0.61	0.37	0.08	0.25	1.15	0.20	1.11	0.03	0.50		4.21	0.86		1.07	0.94	0.74	0.58
Owatonna	25,599	1.32	0.38	0.10	1.12	1.36	0.88	1.21	0.91	5.92	2.28	0.71	0.65	0.98	1.10	1.00	0.60	1.05
Shoreview	25,043		0.07	1.17		0.61	0.05	0.93	0.07	0.04		4.76			0.46	1.11	0.23	0.53
Austin	24,718	0.79	0.27	0.24	0.36	1.29	1.18	0.75	0.20	0.20	1.34	0.67	0.37	0.81	0.86	0.72	0.49	0.60
White Bear Lake	23,797	1.21	1.63	0.15	0.23	0.98	3.42	1.91	0.70	0.68	1.54	0.44	1.07		1.89	0.81	0.78	0.91
Chaska	23,770	0.68			1.33	1.00	1.00	0.88	0.89	0.04		0.67	0.46	1.13	0.63	0.47	0.58	0.53
Ramsey	23,668	0.79	2.23			0.72	0.02	1.13	0.00	0.24		0.42	0.22		0.34	0.30	0.58	0.32
Faribault	23,352	0.95	0.39	0.22	0.42	1.27	0.92	0.79	0.53	0.15	1.45	0.26	0.39	0.46	0.88	0.40	0.35	0.70
Champlin	23,089	0.27	0.00	0.07	0.05	0.85	0.92	1.03	0.06	0.07		4.67	0.56		0.88	0.29	0.50	0.44
Elk River	22,974	1.69	0.63	0.16	2.82	1.24	1.22	1.17	0.34	0.56	2.09	1.74	0.42	0.14	0.97	1.45	0.66	1.04
Chanhassen	22,952	0.44	0.33	0.16	2.17	1.75	1.23	0.94	0.03	0.20		8.52	1.87	0.79	1.23	1.59	1.31	1.08
Prior Lake	22,796	0.57	0.03	0.01	0.14	0.94	1.64	0.82	0.15	0.02		0.61	0.74	2.18	0.57	0.44	0.50	0.40
Hastings	22,172	0.63	0.10	0.18	0.80	0.95	1.37	1.13	0.36	0.01	1.97	0.37	0.33	0.27	0.91	0.73	0.37	0.65
Crystal	22,151	0.81	0.78	0.14		1.33	1.08	0.74	0.58	1.15		5.15	0.07		0.90	0.65	0.61	0.56
Rosemount	21,874	0.64		0.02	0.15	0.99	0.85	0.61	0.01	0.09		0.83	0.26		0.68	0.55	0.30	0.32
Unadjusted Average: *		0.92	0.66	0.68	1.17	1.01	1.01	1.06	0.54	0.62	1.91	1.91	0.64	0.90	0.91	0.81	0.76	0.73

* 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 21,800 & 32,800 (Range: Population of Oakdale +/- ~ 20%.) (20 Cities)

Rankings

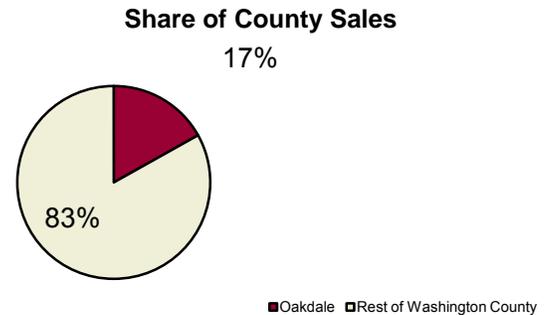
Town	Population	Vehicles, Parts	Furniture Stores	Elec- tronics	Building Materials	Food	Health, Personal	Gasoline Stations	Apparel	Leisure Goods	General Merch.	Misc.	Amuse- ment	Lodging	Eating & Drinking	Repair, Maint.	Personal Services	Taxable \$ Pull Factor
Town name																		
Andover	# 1	# 19				# 15	# 17	# 20	# 17	# 9		# 6	# 17		# 20	# 11	# 18	# 20
Brooklyn Center	# 2	# 2	# 7	# 2		# 16	# 9	# 9	# 1	# 7	# 10	# 9	# 16	# 2	# 14	# 14	# 20	# 9
Winona	# 3	# 6	# 8	# 4	# 5	# 8	# 16	# 2	# 11	# 8	# 2	# 15	# 14	# 5	# 2	# 6	# 15	# 6
Oakdale	# 4	# 8	# 4	# 1	# 3	# 17	# 15	# 18	# 12	# 2	# 5	# 20	# 2	# 8	# 13	# 15	# 17	# 2
Fridley	# 5	# 1	# 2		# 2	# 19	# 13	# 5	# 18	# 14	# 1	# 8			# 6	# 1	# 1	# 1
Savage	# 6	# 15	# 11	# 13	# 11	# 7	# 18	# 8	# 15	# 6		# 5	# 4		# 5	# 7	# 4	# 12
Owatonna	# 7	# 4	# 10	# 12	# 7	# 2	# 12	# 3	# 2	# 1	# 3	# 11	# 6	# 4	# 4	# 5	# 7	# 4
Shoreview	# 8		# 15	# 3		# 20	# 19	# 12	# 13	# 18		# 3			# 18	# 4	# 19	# 14
Austin	# 9	# 11	# 13	# 5	# 10	# 4	# 6	# 16	# 9	# 12	# 9	# 12	# 11	# 6	# 12	# 10	# 12	# 11
White Bear Lake	# 10	# 5	# 3	# 10	# 12	# 11	# 1	# 1	# 4	# 4	# 7	# 16	# 3		# 1	# 8	# 3	# 7
Chaska	# 11	# 12			# 6	# 9	# 8	# 13	# 3	# 17		# 13	# 8	# 3	# 16	# 16	# 9	# 15
Ramsey	# 12	# 10	# 1			# 18	# 20	# 6	# 20	# 10		# 17	# 15		# 19	# 19	# 8	# 18
Faribault	# 13	# 7	# 9	# 6	# 9	# 5	# 11	# 15	# 6	# 13	# 8	# 19	# 10	# 9	# 10	# 18	# 14	# 8
Champlin	# 14	# 18	# 17	# 14	# 15	# 14	# 10	# 10	# 14	# 16		# 4	# 7		# 11	# 20	# 11	# 16
Elk River	# 15	# 3	# 6	# 9	# 1	# 6	# 5	# 4	# 8	# 5	# 4	# 7	# 9	# 11	# 7	# 3	# 5	# 5
Chanhassen	# 16	# 17	# 12	# 8	# 4	# 1	# 4	# 11	# 16	# 11		# 1	# 1	# 7	# 3	# 2	# 2	# 3
Prior Lake	# 17	# 16	# 16	# 16	# 14	# 13	# 2	# 14	# 10	# 19		# 14	# 5	# 1	# 17	# 17	# 10	# 17
Hastings	# 18	# 14	# 14	# 7	# 8	# 12	# 3	# 7	# 7	# 20	# 6	# 18	# 12	# 10	# 8	# 9	# 13	# 10
Crystal	# 19	# 9	# 5	# 11		# 3	# 7	# 17	# 5	# 3		# 2	# 18		# 9	# 12	# 6	# 13
Rosemount	# 20	# 13		# 15	# 13	# 10	# 14	# 19	# 19	# 15		# 10	# 13		# 15	# 13	# 16	# 19

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.

Oakdale & Washington 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 Oakdale and Washington County in 2010. Oakdale accounted for 9 percent of the county's firms and 17 percent of the county's sales.



Sales by Merchandise Category, Oakdale & Washington County, 2010

Merchandise Category	Oakdale		Washington County		City's Share of County Total	
	Taxable Sales (\$millions)	Number of Firms	Taxable Sales (\$millions)	Number of Firms	Sales	Firms
Vehicles & Parts	\$8.19	11	\$55.48	87	14.8%	12.6%
Furniture Stores	\$6.83	6	\$55.40	99	12.3%	6.1%
Electronics	\$43.90	8	\$61.48	51	71.4%	15.7%
Building Materials	\$54.70	9	\$243.11	62	22.5%	14.5%
Food, Groceries	\$11.86	11	\$137.05	123	8.7%	8.9%
Health, Personal Stores	\$2.53	7	\$26.82	58	9.5%	12.1%
Gasoline Stations	\$3.28	7	\$31.99	62	10.3%	11.3%
Apparel	\$0.40	12	\$40.23	158	1.0%	7.6%
Leisure Goods	\$7.60	18	\$64.53	160	11.8%	11.3%
General Merchandise	\$56.00	6	\$272.20	30	20.6%	20.0%
Miscellaneous Retail	\$1.58	39	\$69.34	497	2.3%	7.8%
Non-Store Retailers	\$1.09	27	\$6.02	227	18.2%	11.9%
Amusement & Recreation	\$12.92	11	\$63.73	103	20.3%	10.7%
Accommodations	\$6.55	5	\$25.18	48	26.0%	10.4%
Eating & Drinking Places	\$29.19	36	\$264.39	396	11.0%	9.1%
Repair, Maintenance	\$2.76	26	\$31.28	246	8.8%	10.6%
Personal Service, Laundry	\$1.16	31	\$23.50	313	4.9%	9.9%
Total Sales*	\$268.39	393	\$1,590.71	4,338	16.9%	9.1%

Washington County Retail Trade Overview

Total Taxable and Gross Retail Sales

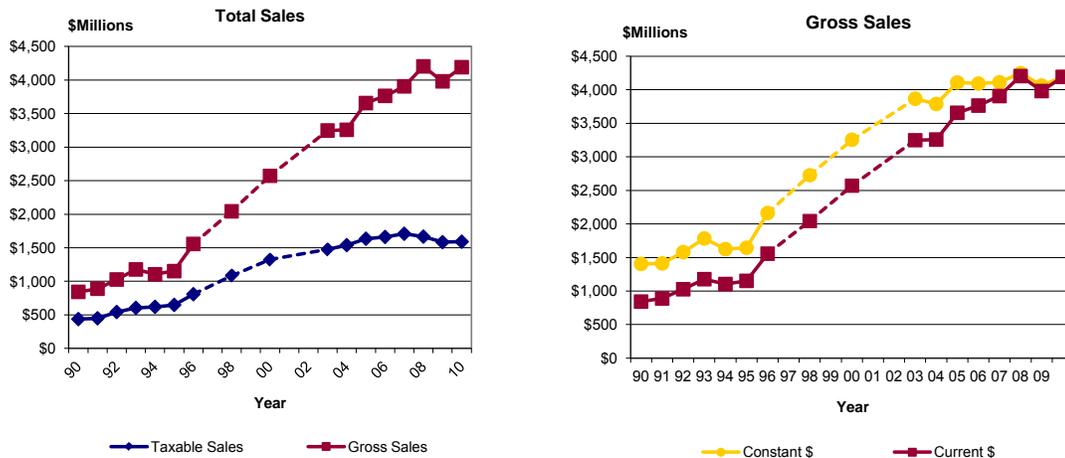
The table below presents gross and taxable retail and services sales for Washington County from 1990 through 2010. Taxable sales in Washington County increased 7.9 percent from 2003 to 2010, while the number of firms rose 14.2 percent. Statewide, taxable sales increased 6.1 percent over the same time 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 2010. For example, in 1990, taxable sales in Washington County totaled \$436.78 million, an amount worth \$727.97 million in 2010 dollars. In constant dollars, gross sales grew 8.4 percent between 2003 and 2010. Constant dollar taxable sales decreased 9.4 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	145,860	\$842.66	\$436.78	\$1,404.43	\$727.97	2,508	\$2,995	0.68
1991	152,849	\$889.50	\$449.01	\$1,411.90	\$712.71	2,571	\$2,938	0.67
1992	159,337	\$1,026.90	\$542.82	\$1,579.85	\$835.11	2,787	\$3,407	0.70
1993	168,130	\$1,176.84	\$604.35	\$1,783.10	\$915.69	2,887	\$3,595	0.71
1994	175,785	\$1,104.58	\$619.40	\$1,624.38	\$910.89	2,935	\$3,524	0.64
1995	181,602	\$1,151.62	\$648.37	\$1,645.17	\$926.24	2,937	\$3,570	0.63
1996	186,934	\$1,556.70	\$807.74	\$2,162.08	\$1,121.86	3,318	\$4,321	0.65
1997	191,915	NA	NA	NA	NA	NA	NA	NA
1998	196,675	\$2,043.59	\$1,084.69	\$2,724.78	\$1,446.26	3,554	\$5,515	0.79
1999	202,606	NA	NA	NA	NA	NA	NA	NA
2000	201,130	\$2,570.58	\$1,322.27	\$3,253.90	\$1,673.76	3,538	\$6,574	0.86
2001	207,191	NA	NA	NA	NA	NA	NA	NA
2002	210,270	NA	NA	NA	NA	NA	NA	NA
2003	213,564	\$3,246.88	\$1,474.48	\$3,865.33	\$1,755.34	3,800	\$6,904	0.77
2004	216,660	\$3,257.72	\$1,539.54	\$3,788.04	\$1,790.17	3,977	\$7,106	0.77
2005	220,426	\$3,656.27	\$1,634.52	\$4,108.16	\$1,836.54	4,165	\$7,415	0.78
2006	225,000	\$3,763.58	\$1,661.06	\$4,090.85	\$1,805.50	4,142	\$7,382	0.77
2007	226,475	\$3,905.56	\$1,708.46	\$4,111.12	\$1,798.38	4,216	\$7,544	0.78
2008	229,173	\$4,203.13	\$1,665.69	\$4,245.58	\$1,682.52	4,297	\$7,268	0.76
2009	231,958	\$3,980.08	\$1,583.91	\$4,061.31	\$1,616.23	4,343	\$6,828	0.76
2010	238,844	\$4,190.81	\$1,590.71	\$4,190.81	\$1,590.71	4,338	\$6,660	0.74
7 yr Change '03 to '10	11.8%	29.1%	7.9%	8.4%	-9.4%	14.2%	-3.5%	-4.6%
3 yr Change '07 to '10	5.5%	7.3%	-6.9%	1.9%	-11.5%	2.9%	-11.7%	-4.9%

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

Washington County: Total Retail Sales

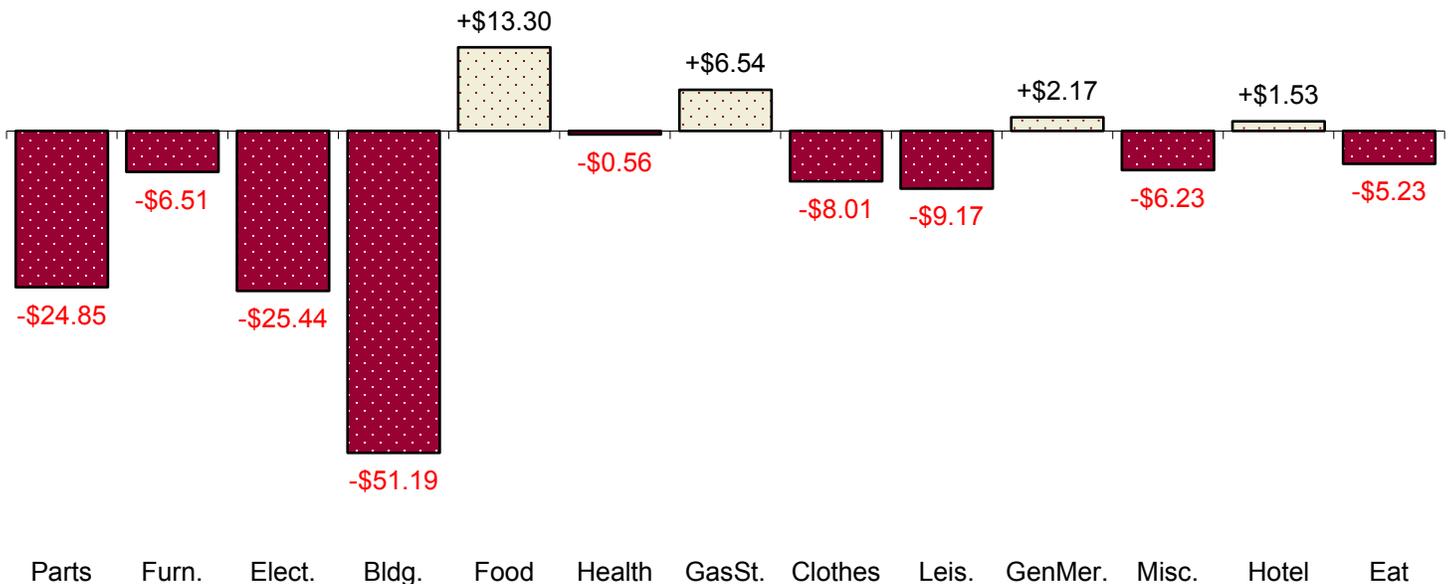


Washington County Components of Change, 2007 to 2010

Category	Taxable Sales 2007	Taxable Sales 2010	Dollar Change	Percent Change
Vehicles & Parts	\$80,323,577	\$55,477,100	-\$24,846,477	-30.93%
Furniture Stores	\$61,912,186	\$55,401,533	-\$6,510,653	-10.52%
Electronics	\$86,916,539	\$61,480,351	-\$25,436,188	-29.27%
Building Materials	\$294,292,478	\$243,105,947	-\$51,186,531	-17.39%
Food, Groceries	\$123,748,450	\$137,048,446	+\$13,299,996	+10.75%
Health, Personal Stores	\$27,378,400	\$26,818,800	-\$559,600	-2.04%
Gasoline Stations	\$25,447,422	\$31,987,954	+\$6,540,532	+25.70%
Apparel	\$48,243,500	\$40,234,054	-\$8,009,446	-16.60%
Leisure Goods	\$73,699,293	\$64,526,308	-\$9,172,985	-12.45%
General Merchandise Stores	\$270,027,087	\$272,199,244	+\$2,172,157	+0.80%
Miscellaneous Retail	\$75,568,021	\$69,342,814	-\$6,225,207	-8.24%
Accommodations	\$23,655,022	\$25,184,191	+\$1,529,169	+6.46%
Eating & Drinking Places	\$269,617,557	\$264,389,551	-\$5,228,006	-1.94%
Total Retail and Services Sales	\$1,708,462,927	\$1,590,705,989	-\$117,756,938	-6.89%

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 - 2010



Pull Factors By Merchandise Category Washington County

The following tables and charts depict pull factors in Washington 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.

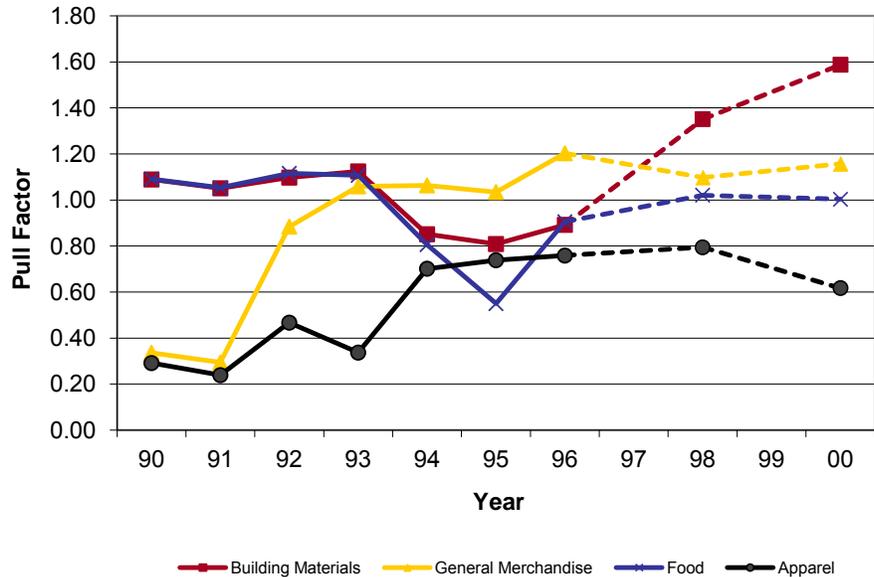
General Merchandise: Includes retail stores which sell a number of lines of merchandise, such as dry goods, apparel and accessories, furniture and home furnishings, small wares, hardware, and food. The stores included in this group are known as department stores, variety stores, general merchandise stores, 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
Washington County, 1990-2000**

Year	Building Materials	General Merchandise	Food	Apparel
1990	1.09	0.34	1.09	0.29
1991	1.05	0.29	1.05	0.24
1992	1.10	0.88	1.12	0.47
1993	1.12	1.06	1.11	0.34
1994	0.85	1.06	0.81	0.70
1995	0.81	1.03	0.55	0.74
1996	0.89	1.20	0.91	0.76
1997	NA	NA	NA	NA
1998	1.35	1.10	1.02	0.79
1999	NA	NA	NA	NA
2000	1.59	1.16	1.00	0.62

% Change, '90 to '00	45.81%	243.96%	-8.01%	111.85%
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% Change, '98 to '00	17.55%	5.47%	-1.71%	-22.42%
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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 Washington County

The following tables and charts depict pull factors in Washington 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.

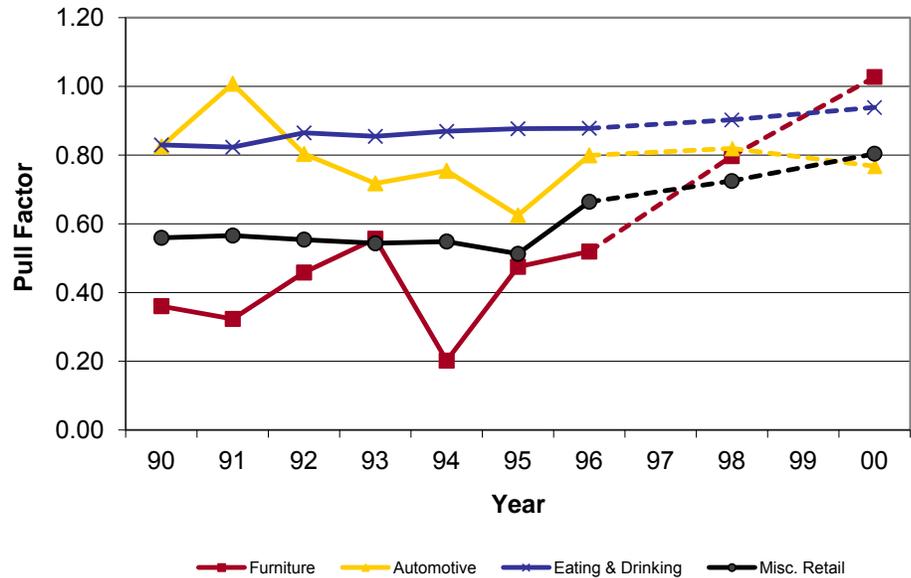
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

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
Washington County, 1990-2000**

Year	Furniture	Automotive	Eating & Drinking	Misc. Retail
1990	0.36	0.83	0.83	0.56
1991	0.32	1.01	0.82	0.57
1992	0.46	0.80	0.86	0.55
1993	0.56	0.72	0.85	0.54
1994	0.20	0.75	0.87	0.55
1995	0.48	0.62	0.88	0.51
1996	0.52	0.80	0.88	0.66
1997	NA	NA	NA	NA
1998	0.80	0.82	0.90	0.72
1999	NA	NA	NA	NA
2000	1.03	0.77	0.94	0.80

% Change, '90 to '00	184.82%	-6.93%	13.17%	43.71%
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% Change, '98 to '00	28.84%	-6.25%	4.00%	10.93%
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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 Washington County

The following tables and charts depict pull factors in Washington 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.

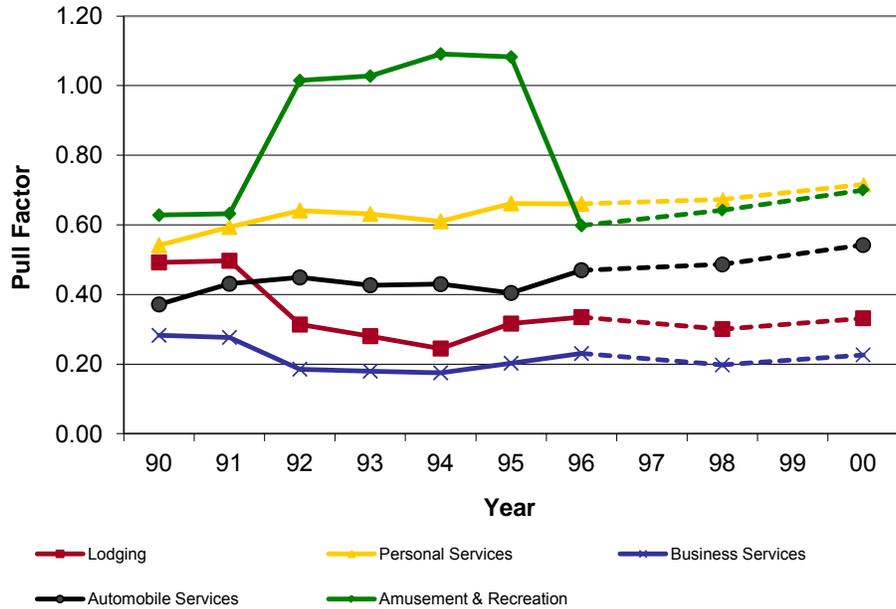
Business Services: Includes establishments primarily engaged in providing services, not elsewhere classified, to business establishments on a contract or fee basis.

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
Washington County, 1990-2000**

Year	Lodging	Personal Services	Business Services	Automobile Services	Amusement & Recreation
1990	0.49	0.54	0.28	0.37	0.63
1991	0.50	0.59	0.28	0.43	0.63
1992	0.31	0.64	0.19	0.45	1.01
1993	0.28	0.63	0.18	0.43	1.03
1994	0.24	0.61	0.17	0.43	1.09
1995	0.32	0.66	0.20	0.40	1.08
1996	0.33	0.66	0.23	0.47	0.60
1997	NA	NA	NA	NA	NA
1998	0.30	0.67	0.20	0.49	0.64
1999	NA	NA	NA	NA	NA
2000	0.33	0.72	0.23	0.54	0.70
% Change, '90 to '00	-32.62%	32.19%	-19.89%	45.98%	11.42%
% Change, '98 to '00	10.41%	6.28%	14.53%	11.49%	8.96%

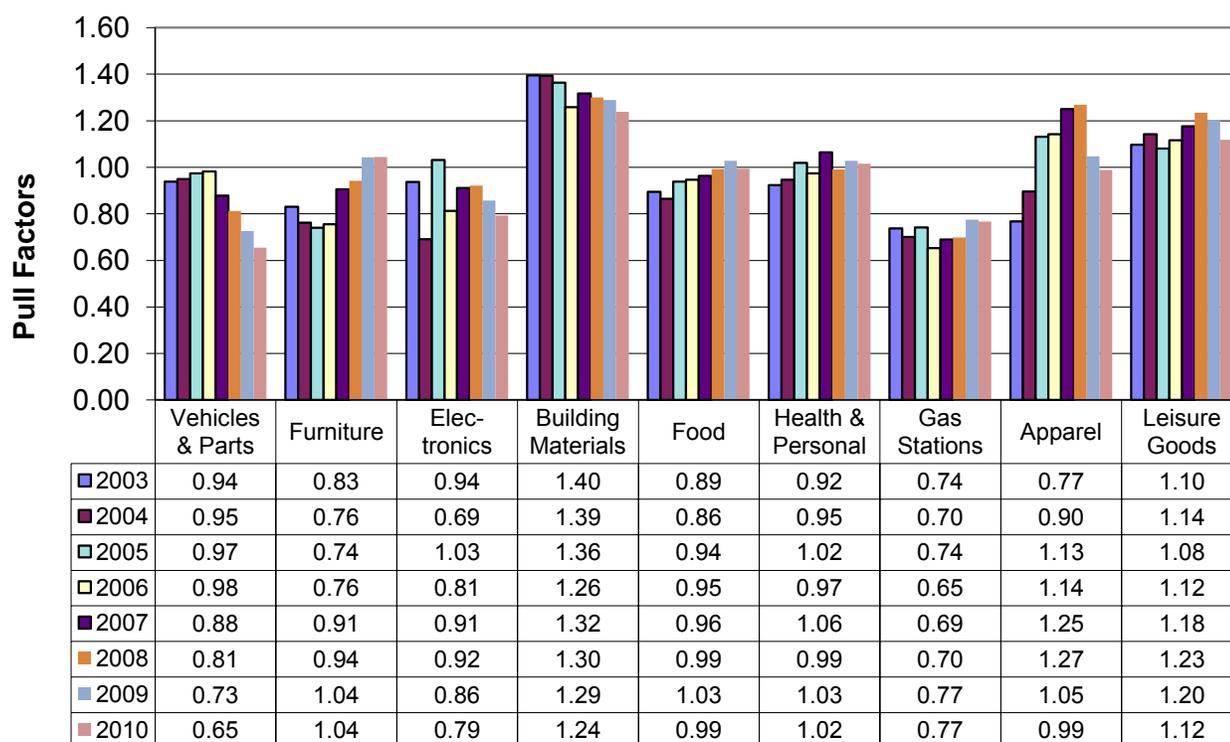
These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide,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

Pull Factors By Merchandise Category

Washington County

The following tables and charts depict pull factors in Washington 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.

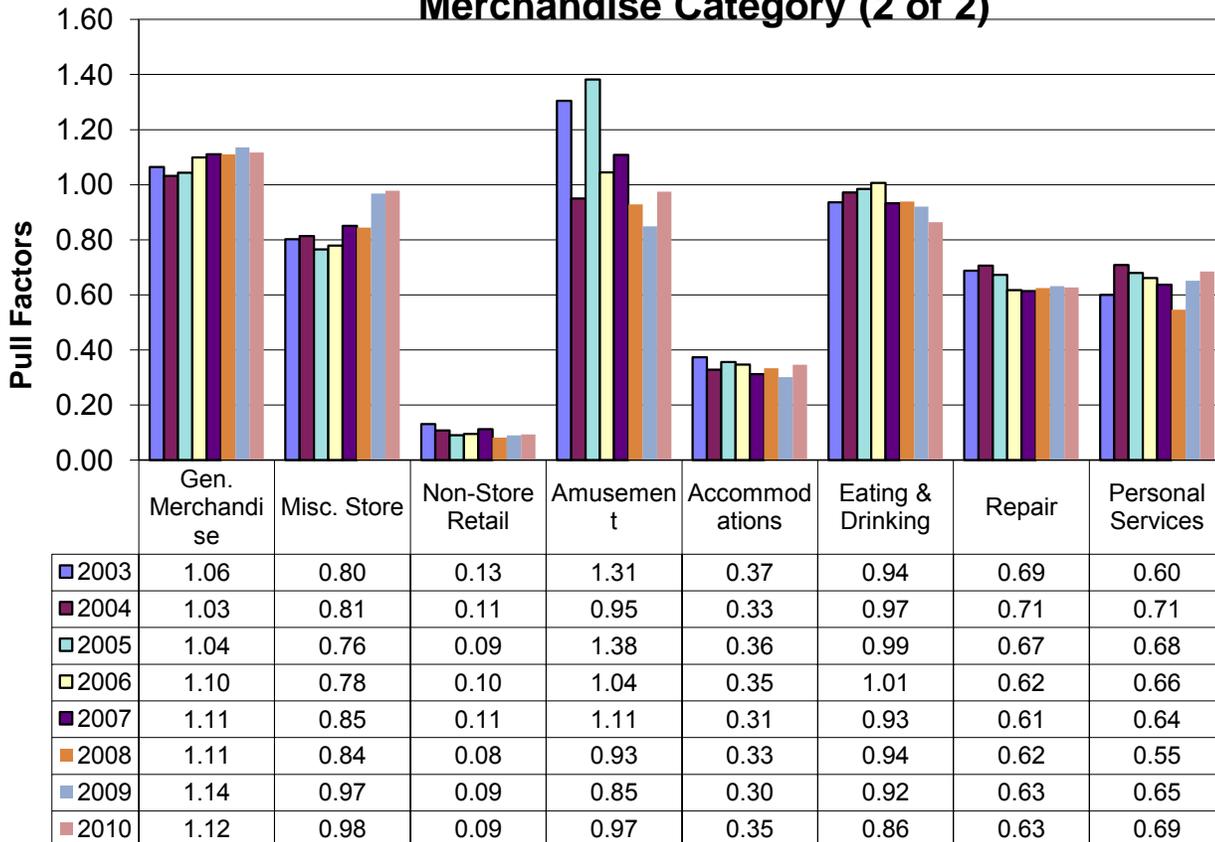
*Caution should be used when comparing pull factors before 2003 to those in later years due to the switch from SIC to NAICS.

Recent Trends By Merchandise Category

Washington County

The following tables and charts depict pull factors in Washington 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,

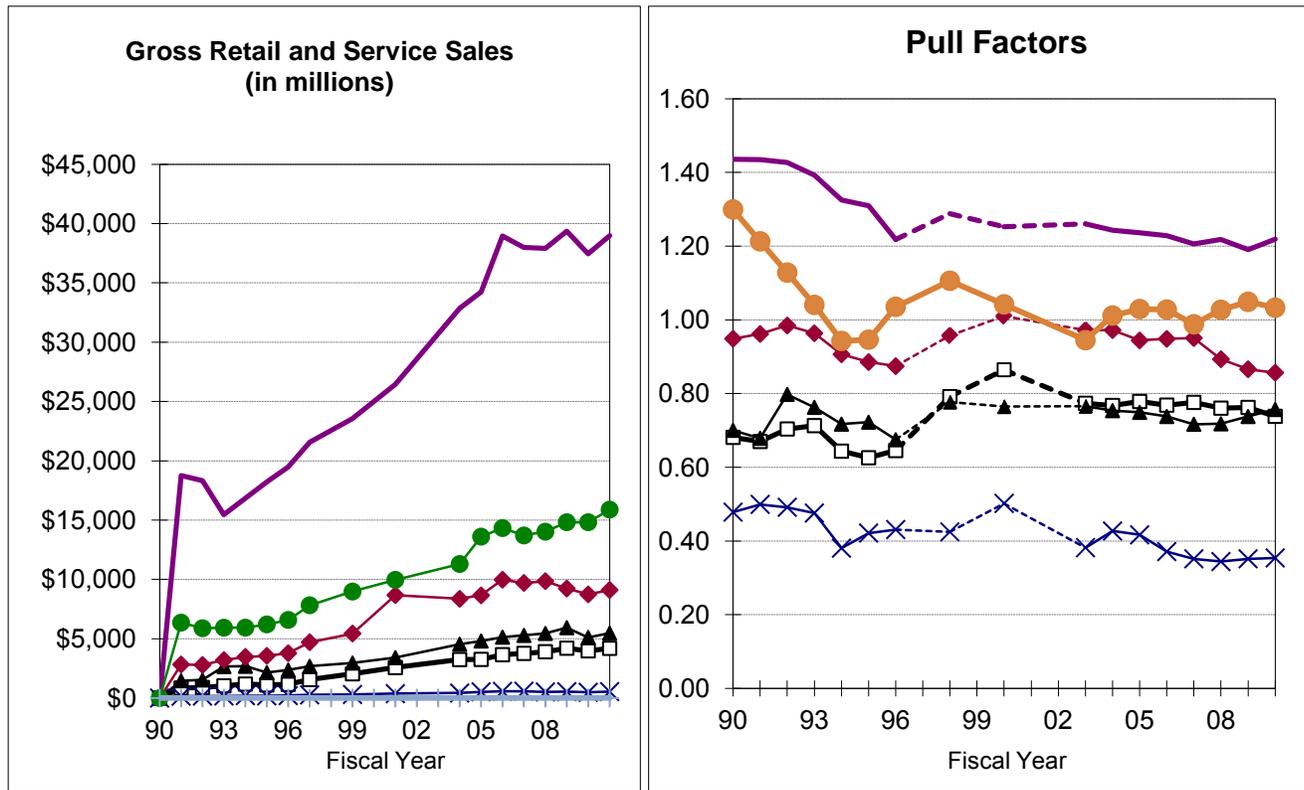
Repair: Businesses that return equipment to working order. Examples: cars, lawnmowers, small engines, knives, shoes, computers, furniture, and appliances.

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

Washington County



- Washington County
- × Chisago County
- Hennepin County
- ▲ Anoka County
- ◆ Dakota County
- Ramsey 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)
Washington County	238,844	\$4,190.81	\$1,590.71	4,338	\$6,660	0.74
Anoka County	331,302	\$5,469.80	\$2,262.18	5,731	\$6,828	0.76
Chisago County	53,925	\$542.53	\$172.21	1,065	\$3,194	0.35
Dakota County	399,100	\$9,110.74	\$3,084.19	7,340	\$7,728	0.86
Hennepin County	1,154,623	\$38,990.10	\$12,696.99	27,505	\$10,997	1.22
Ramsey County	509,320	\$15,885.95	\$4,746.25	9,925	\$9,319	1.03

Trade Area Analysis of Retail Sales

Washington 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	\$91.59	\$55.48	-\$36.12	-39.4%	-94,178	87	3.5%
Furniture Stores	\$57.37	\$55.40	-\$1.97	-3.4%	-8,212	99	3.5%
Electronics	\$83.80	\$61.48	-\$22.32	-26.6%	-63,623	51	3.9%
Building Materials	\$212.26	\$243.11	+\$30.85	+14.5%	34,712	62	15.3%
Food, Groceries	\$149.08	\$137.05	-\$12.04	-8.1%	-19,281	123	8.7%
Health, Personal Stores	\$28.56	\$26.82	-\$1.74	-6.1%	-14,558	58	1.7%
Gasoline Stations	\$45.10	\$31.99	-\$13.11	-29.1%	-69,446	62	2.0%
Apparel	\$44.05	\$40.23	-\$3.82	-8.7%	-20,702	158	2.5%
Leisure Goods	\$62.36	\$64.53	+\$2.16	+3.5%	8,278	160	4.1%
General Merchandise Stores	\$263.58	\$272.20	+\$8.62	+3.3%	7,808	30	17.2%
Miscellaneous Retail	\$76.63	\$69.34	-\$7.28	-9.5%	-22,700	497	4.4%
Amusement & Recreation	\$70.72	\$63.73	-\$6.99	-9.9%	-23,613	103	4.0%
Accommodations	\$78.61	\$25.18	-\$53.43	-68.0%	-162,329	48	1.6%
Eating & Drinking Places	\$330.78	\$264.39	-\$66.39	-20.1%	-47,940	396	16.7%
Repair, Maintenance	\$53.89	\$31.28	-\$22.60	-41.9%	-100,180	246	2.0%
Personal Services, Laundry	\$37.09	\$23.50	-\$13.59	-36.6%	-87,527	313	1.5%
Total Taxable Retail & Service	\$2,329.70	\$1,583.91	-\$745.79	-32.0%	-76,459	4,338	100.0%

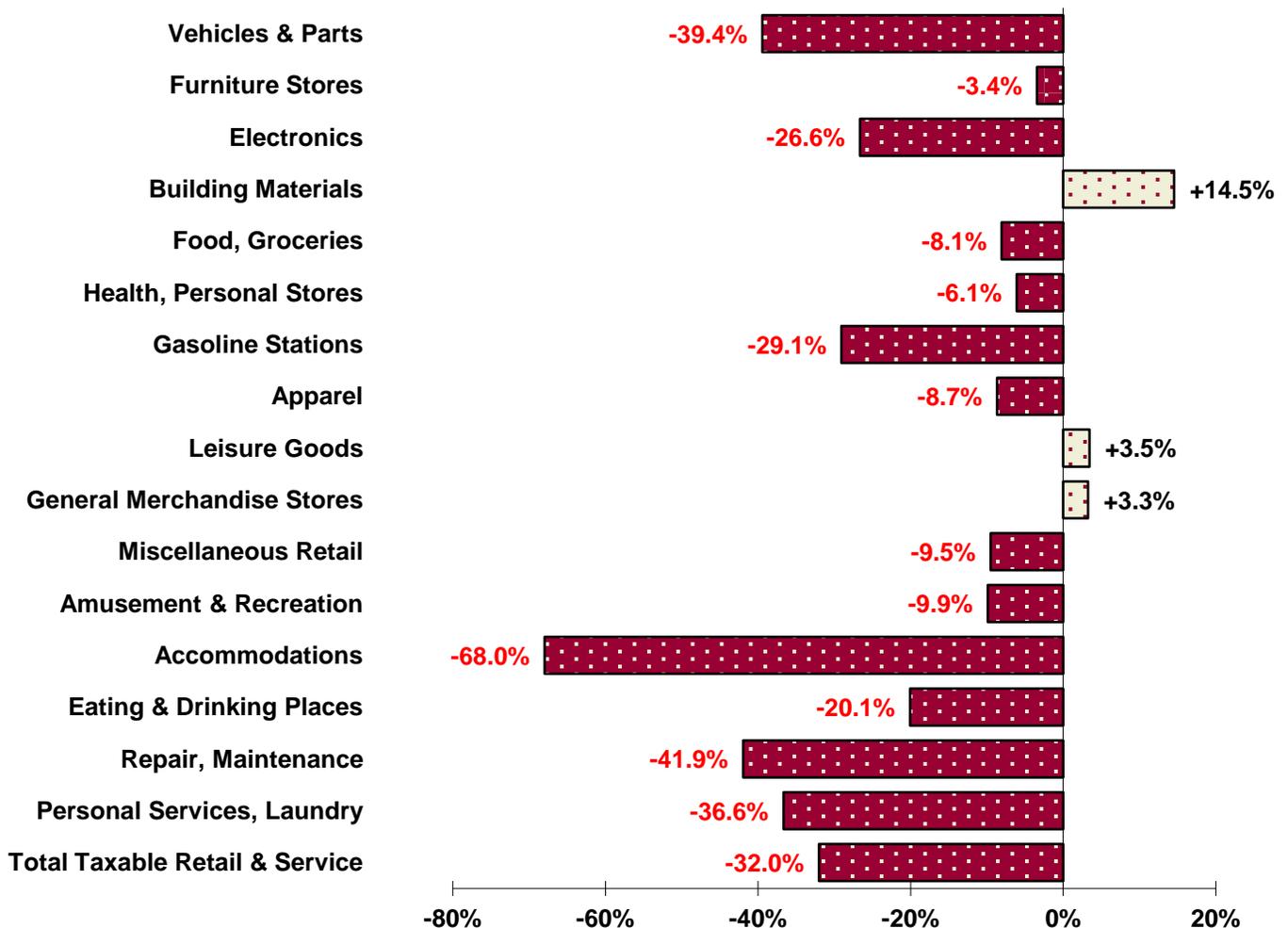
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of Washington County Retail Trade

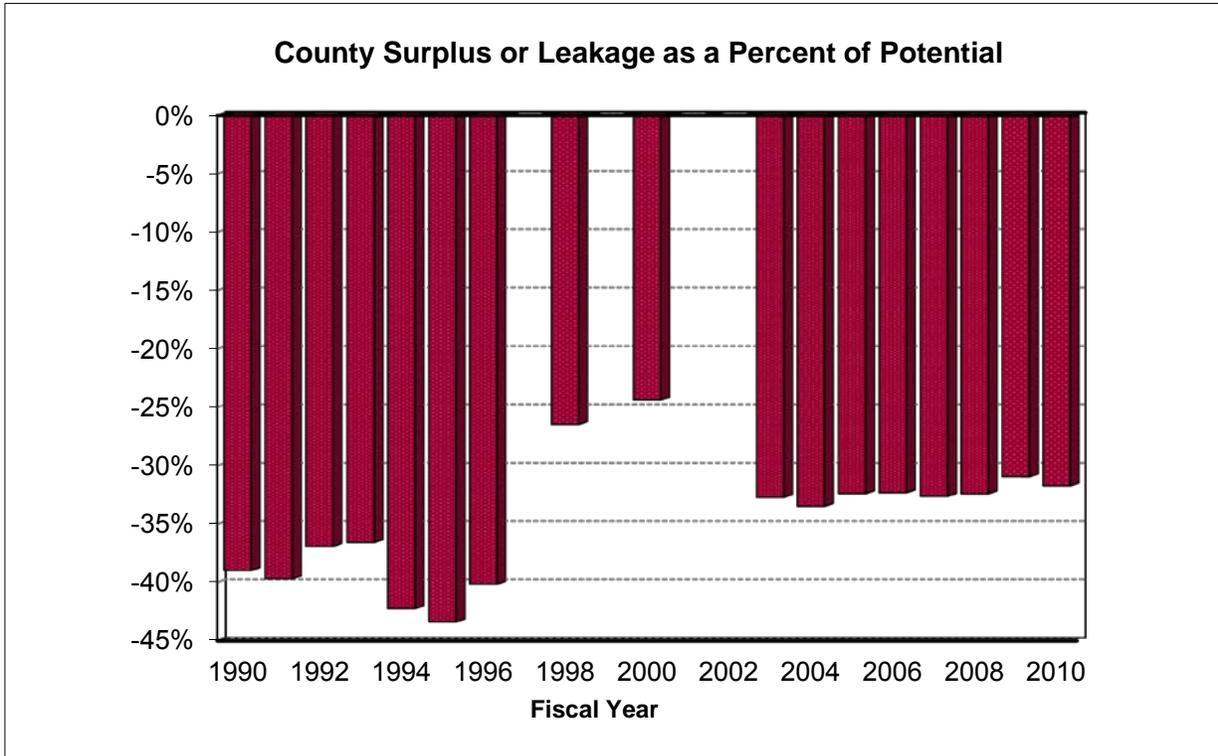
The chart below depicts the percentage amount Washington County's actual sales were above or below potential sales in 2010 by merchandise group. Of the 16 merchandise categories with reported data, sales in 3 of the categories were above what would be expected based on the county's population and income characteristics as well as statewide spending patterns. The strongest merchandise group by this standard is the Building Materials category, which has a 14.5 percent surplus. Overall, Washington County had a retail sales leakage of 32 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



Washington 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	145,860	1.12	\$715.8	\$436.8	-\$279.0	-39.0%	-56,856
1991	152,849	1.11	\$744.7	\$449.0	-\$295.7	-39.7%	-60,688
1992	159,337	1.12	\$860.3	\$542.8	-\$317.5	-36.9%	-58,801
1993	168,130	1.12	\$952.9	\$604.4	-\$348.6	-36.6%	-61,501
1994	175,785	1.11	\$1,072.5	\$619.4	-\$453.1	-42.2%	-74,265
1995	181,602	1.11	\$1,145.3	\$648.4	-\$496.9	-43.4%	-78,791
1996	186,934	1.08	\$1,349.4	\$807.7	-\$541.7	-40.1%	-75,040
1997	191,915	1.08	NA	NA	NA	NA	NA
1998	196,675	1.08	\$1,475.2	\$1,084.7	-\$390.5	-26.5%	-52,065
1999	202,606	1.08	NA	NA	NA	NA	NA
2000	201,130	1.14	\$1,748.5	\$1,322.3	-\$426.2	-24.4%	-49,030
2001	207,191	1.14	NA	NA	NA	NA	NA
2002	210,270	1.14	NA	NA	NA	NA	NA
2003	213,564	1.15	\$2,191.4	\$1,474.5	-\$716.9	-32.7%	-69,870
2004	216,660	1.15	\$2,314.8	\$1,539.5	-\$775.3	-33.5%	-72,562
2005	220,426	1.15	\$2,417.7	\$1,634.5	-\$783.2	-32.4%	-71,405
2006	225,000	1.14	\$2,454.2	\$1,661.1	-\$793.2	-32.3%	-72,717
2007	226,475	1.15	\$2,535.9	\$1,708.5	-\$827.4	-32.6%	-73,894
2008	229,173	1.13	\$2,464.4	\$1,665.7	-\$798.7	-32.4%	-74,275
2009	231,958	1.10	\$2,293.7	\$1,583.9	-\$709.8	-30.9%	-71,779
2010	238,844	1.08	\$2,329.7	\$1,590.7	-\$739.0	-31.7%	-75,762

**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.

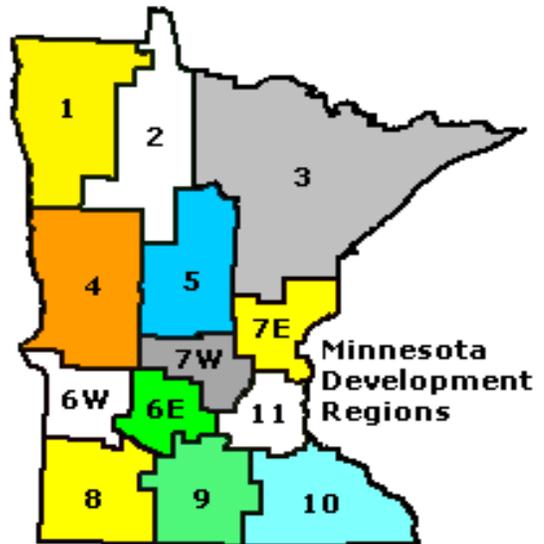
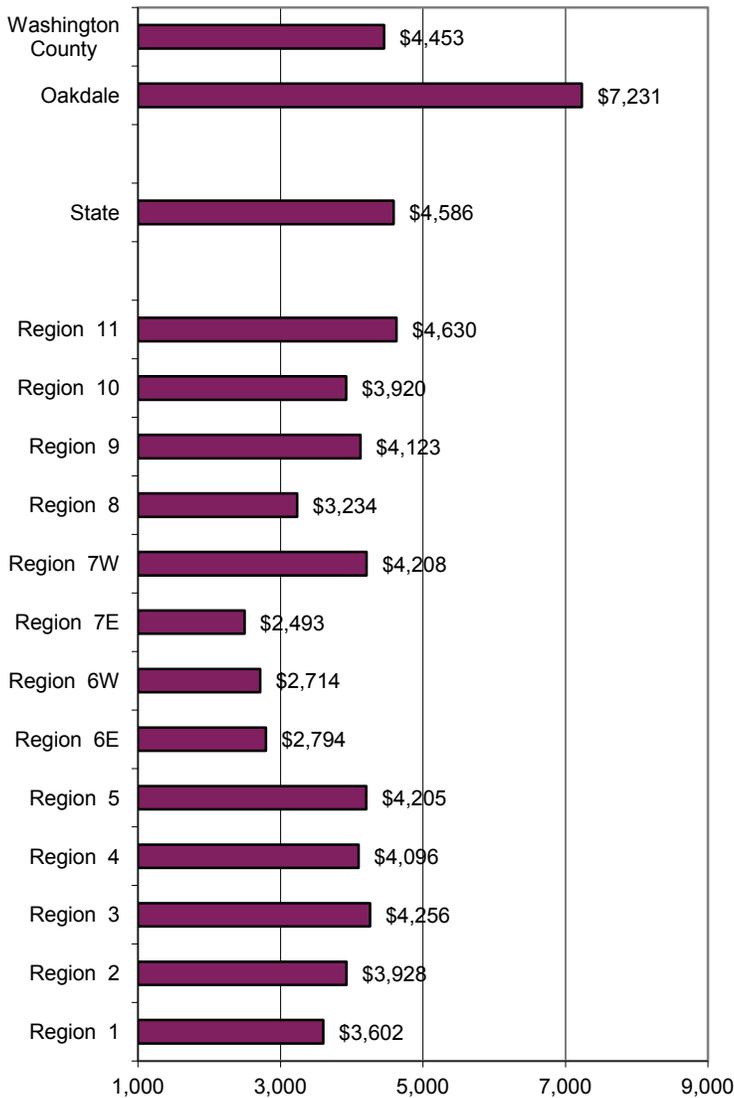
<i>Business Activity / Store Type</i>	<i>People Per Business</i>		<i>Sales Per Capita</i>		
	State	Non-Metro	State	Non-Metro	Oakdale
RETAIL TRADE					
441 Vehicles, Parts	1,791	1,404	\$354.67	\$343.35	\$300.08
442 Furniture Stores	2,359	2,719	\$222.17	\$155.34	\$250.20
443 Electronics	2,949	3,879	\$324.51	\$138.07	\$1,608.03
444 Building Materials	2,146	1,636	\$821.91	\$864.05	\$2,003.77
445 Food and Beverage Stores	1,478	1,324	\$577.29	\$489.86	\$434.58
446 Health, Personal Stores	3,050	3,585	\$110.59	\$62.66	\$92.85
447 Gasoline Stations	2,357	1,857	\$174.64	\$205.85	\$120.32
448 Clothing & Accessory Stores	1,361	1,759	\$170.58	\$81.05	\$14.76
451 Leisure Goods	1,211	1,164	\$241.49	\$159.78	\$278.43
452 General Merchandise	4,650	3,704	\$1,020.65	\$1,050.20	\$2,051.27
453 Miscellaneous Merchandise	364	347	\$296.71	\$225.82	\$57.85
454 Non-store Retail	772	880	\$270.53	\$74.26	\$40.10
Retail Total			\$4,585.73	\$3,850.29	\$7,252.23
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	\$201.96
722 Food Services, Drinking Places	465	451	\$1,280.87	\$954.35	\$1,197.95
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

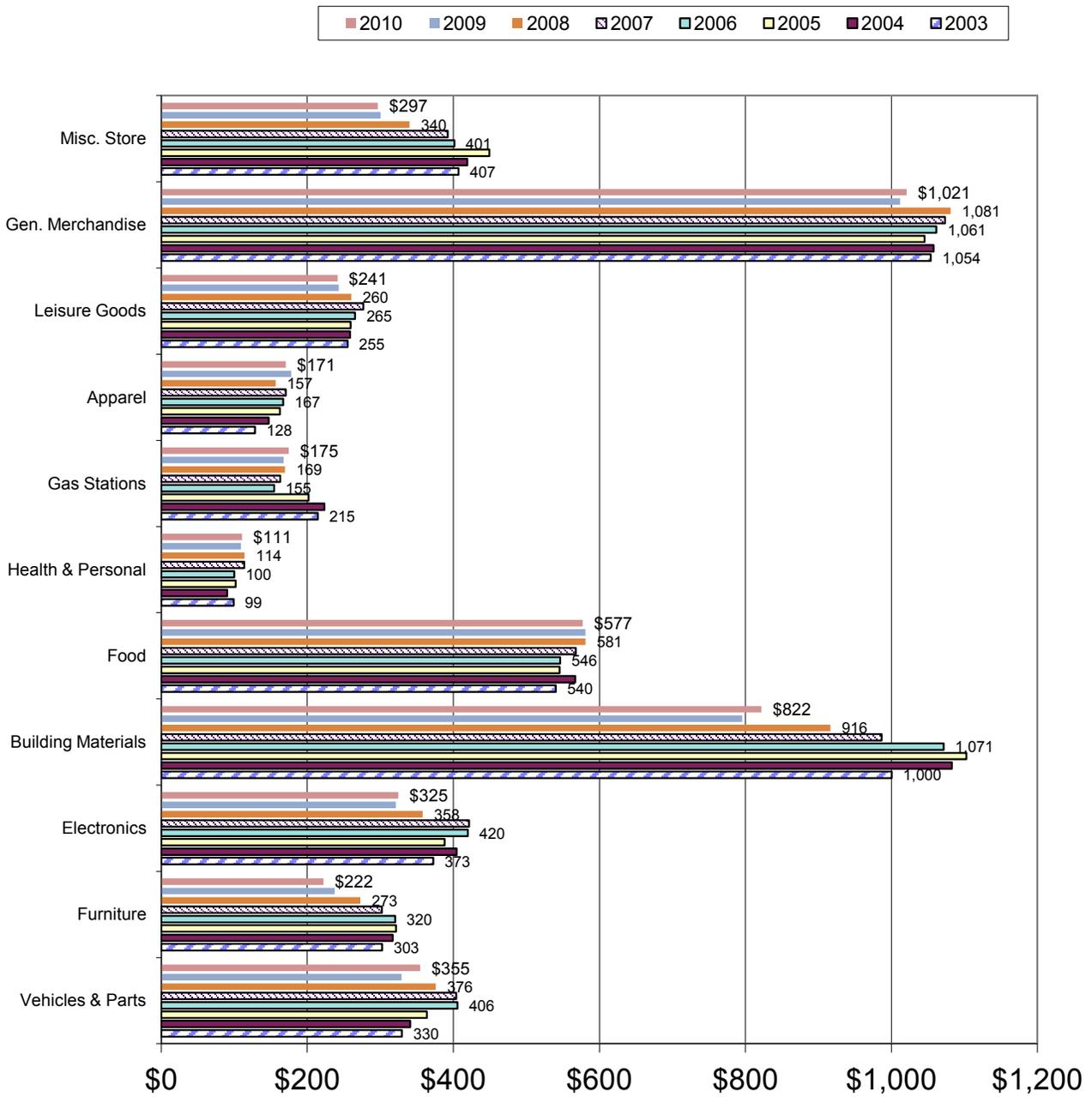
Oakdale and Washington County

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



Woodbury Retail Trade Overview

Total Taxable and Gross Retail Sales

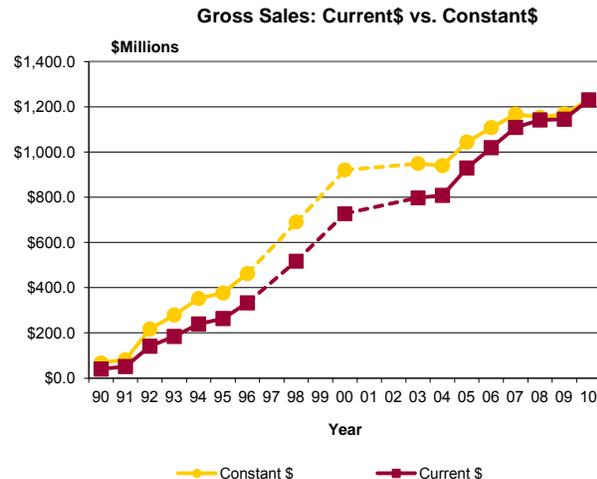
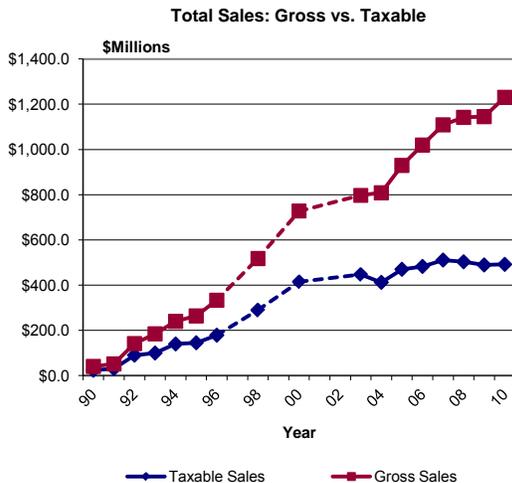
The table below presents gross and taxable retail and services sales for Woodbury from 1990 through 2010. Without inflation adjustments, taxable sales in Woodbury increased 9.8 percent from 2003 to 2010, while the number of firms rose 28.2 percent. Statewide, taxable sales increased 6.1 percent over 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 Woodbury totaled \$23.23 million, an amount worth \$38.71 million in 2010 dollars. In constant dollars, gross sales grew 29.6 percent between 2003 and 2010. Constant dollar taxable sales decreased 7.7 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	20,138	\$40.18	\$23.23	\$66.96	\$38.71	210	\$1,153	0.26
1991	22,004	\$51.31	\$30.26	\$81.45	\$48.04	235	\$1,375	0.31
1992	23,755	\$141.18	\$90.00	\$217.19	\$138.46	346	\$3,789	0.78
1993	26,729	\$184.36	\$99.60	\$279.34	\$150.91	361	\$3,726	0.74
1994	29,538	\$239.49	\$139.60	\$352.19	\$205.29	404	\$4,726	0.86
1995	32,283	\$263.56	\$144.94	\$376.52	\$207.05	413	\$4,490	0.79
1996	34,721	\$332.90	\$178.51	\$462.36	\$247.94	504	\$5,141	0.77
1997	37,266	NA	NA	NA	NA	NA	\$0	NA
1998	40,356	\$517.29	\$288.86	\$689.72	\$385.15	620	\$7,158	1.03
1999	44,460	NA	NA	NA	NA	NA	\$0	NA
2000	46,463	\$727.40	\$415.31	\$920.76	\$525.71	672	\$8,939	1.18
2001	48,681	NA	NA	NA	NA	NA	\$0	NA
2002	49,201	NA	NA	NA	NA	NA	\$0	NA
2003	49,415	\$797.25	\$447.67	\$949.11	\$532.94	809	\$9,059	1.02
2004	50,020	\$808.23	\$412.25	\$939.80	\$479.36	841	\$8,242	0.89
2005	52,420	\$929.28	\$470.02	\$1,044.13	\$528.11	903	\$8,966	0.94
2006	54,365	\$1,019.25	\$482.61	\$1,107.88	\$524.57	929	\$8,877	0.92
2007	55,354	\$1,108.78	\$510.87	\$1,167.14	\$537.76	955	\$9,229	0.95
2008	56,442	\$1,141.91	\$503.04	\$1,153.44	\$508.12	999	\$8,912	0.93
2009	57,335	\$1,145.19	\$489.18	\$1,168.56	\$499.17	1,043	\$8,532	0.95
2010	61,961	\$1,230.32	\$491.69	\$1,230.32	\$491.69	1,037	\$7,935	0.88
7 yr Change								
'03 to '10	25.4%	54.3%	9.8%	29.6%	-7.7%	28.2%	-12.4%	-13.4%
3 yr Change								
'07 to '10	11.9%	11.0%	-3.8%	5.4%	-8.6%	8.6%	-14.0%	-7.3%

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

Woodbury: Total Retail Sales



Woodbury Components of Change, 2007 to 2010

Category	Taxable Sales 2007	Taxable Sales 2010	Dollar Change	Percent Change
Vehicles & Parts	\$4,326,050	\$5,285,025	+\$958,975	+22.17%
Furniture Stores	\$45,417,645	\$45,760,461	+\$342,816	+0.75%
Electronics	\$32,574,142	\$14,660,352	-\$17,913,790	-54.99%
Building Materials	\$38,168,869	\$32,366,162	-\$5,802,707	-15.20%
Food, Groceries	\$33,701,668	\$47,455,639	+\$13,753,971	+40.81%
Health, Personal Stores	\$10,589,642	\$12,008,459	+\$1,418,817	+13.40%
Gasoline Stations	\$4,048,480	\$5,046,144	+\$997,664	+24.64%
Apparel	\$28,419,690	\$27,525,419	-\$894,271	-3.15%
Leisure Goods	\$55,225,245	\$46,996,870	-\$8,228,375	-14.90%
General Merchandise Stores	\$77,851,412	\$74,450,105	-\$3,401,307	-4.37%
Miscellaneous Retail	\$30,773,057	\$28,567,506	-\$2,205,551	-7.17%
Accommodations	\$5,821,840	\$6,282,797	+\$460,957	+7.92%
Eating & Drinking	+\$93,460,492	+\$86,508,972	-\$6,951,520	-7.44%
Total Retail and Services Sales	\$510,871,442	\$491,687,758	-\$19,183,684	-3.76%

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 to 2010



Historical Trends By Merchandise Category Woodbury

The following tables and charts depict pull factors in Woodbury 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

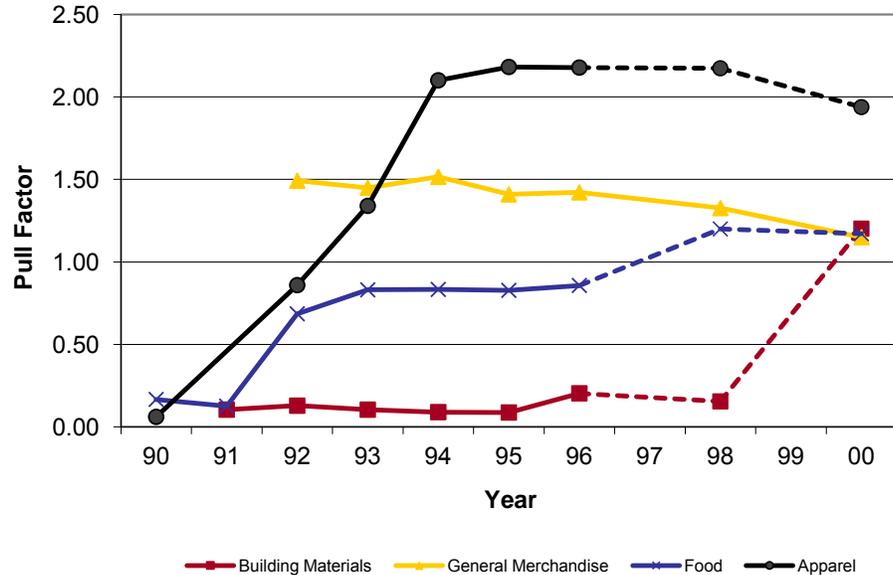
Building Materials: Includes retail establishments primarily engaged in selling lumber and other building materials; paint, glass, and wallpaper; hardware; nursery stock; and lawn and garden supplies.

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.

Pull Factors by Merchandise Category (1 of 3)



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

Year	Building Materials	General Merchandise	Food	Apparel
1990	NA	NA	0.17	0.06
1991	0.10	NA	0.13	NA
1992	0.13	1.49	0.69	0.86
1993	0.10	1.45	0.83	1.34
1994	0.09	1.52	0.83	2.10
1995	0.09	1.41	0.83	2.18
1996	0.20	1.42	0.86	2.18
1997	NA	NA	NA	NA
1998	0.15	1.33	1.20	2.17
1999	NA	NA	NA	NA
2000	1.20	1.15	1.17	1.94

% Change, '90 to '00

Building Materials	NA	NA	604.17%	3099.63%
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% Change, '98 to '00

Building Materials	677.02%	-13.30%	-2.41%	-10.85%
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*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.

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 Woodbury

The following tables and charts depict pull factors in Woodbury 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.

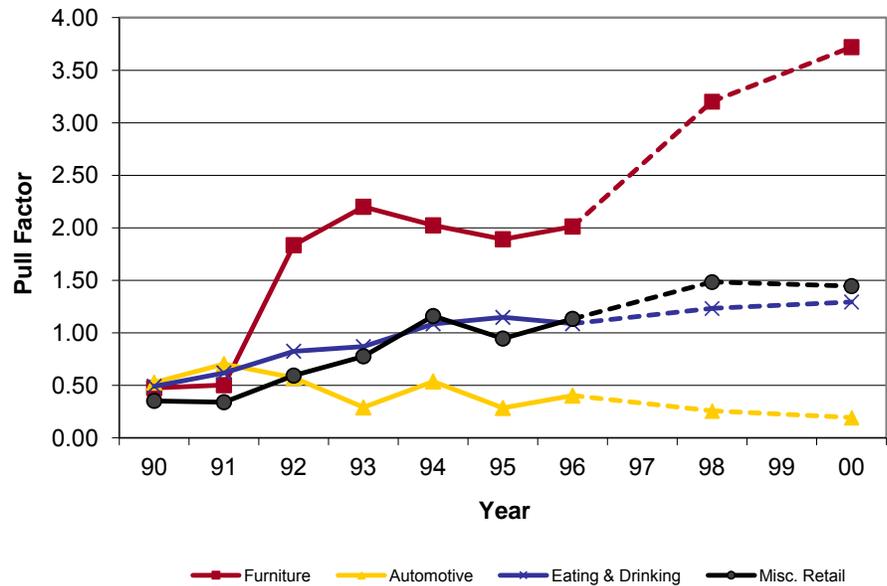
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

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
Woodbury, 1990-2000**

Year	Furniture	Automotive	Eating & Drinking	Misc. Retail
1990	0.48	0.53	0.49	0.35
1991	0.50	0.70	0.62	0.34
1992	1.83	0.57	0.83	0.59
1993	2.20	0.29	0.87	0.78
1994	2.02	0.54	1.09	1.16
1995	1.89	0.29	1.15	0.95
1996	2.01	0.40	1.09	1.13
1997	NA	NA	NA	NA
1998	3.20	0.26	1.23	1.48
1999	NA	NA	NA	NA
2000	3.72	0.19	1.29	1.45

% Change, '90 to '00 682.28% -63.20% 162.72% 308.91%

% Change, '98 to '00 16.24% -24.92% 5.01% -2.56%

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 Woodbury

The following tables and charts depict pull factors in Woodbury 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.

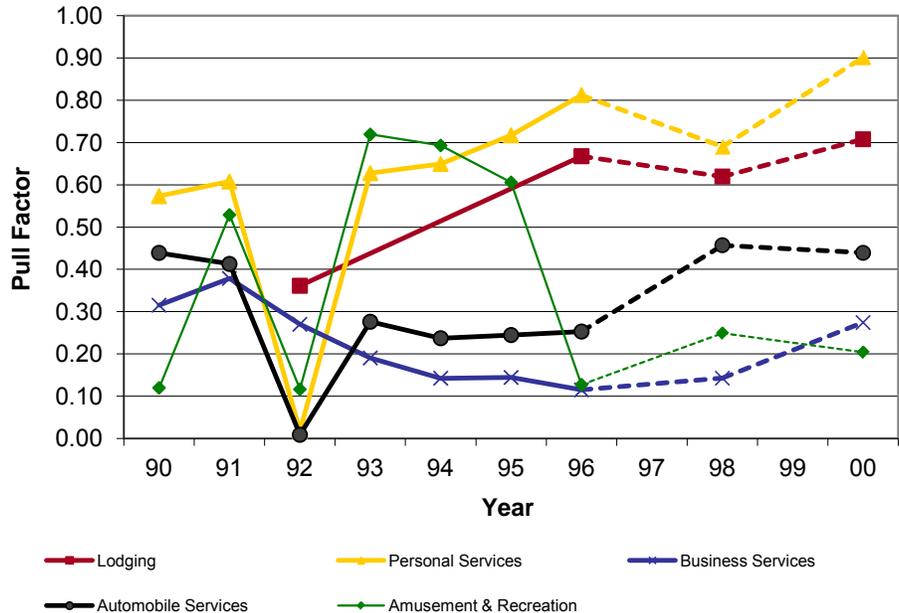
Personal Services: includes establishments primarily engaged in providing services generally to individuals, such as barber and beauty shops, drycleaning plants, laundries, and photographic studios.

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 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 (3 of 3)



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

Year	Lodging	Personal Services	Business Services	Automobile Services	Amusement & Recreation
1990	NA	0.57	0.32	0.44	0.12
1991	NA	0.61	0.38	0.41	0.53
1992	0.36	0.02	0.27	0.01	0.12
1993	NA	0.63	0.19	0.28	0.72
1994	NA	0.65	0.14	0.24	0.69
1995	NA	0.72	0.14	0.24	0.61
1996	0.67	0.81	0.12	0.25	0.13
1997	NA	NA	NA	NA	NA
1998	0.62	0.69	0.14	0.46	0.25
1999	NA	NA	NA	NA	NA
2000	0.71	0.90	0.27	0.44	0.20
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% Change, '90 to '00	NA	57.32%	-12.96%	0.10%	69.89%
% Change, '98 to '00	14.26%	30.74%	92.17%	-3.83%	-18.25%

*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.

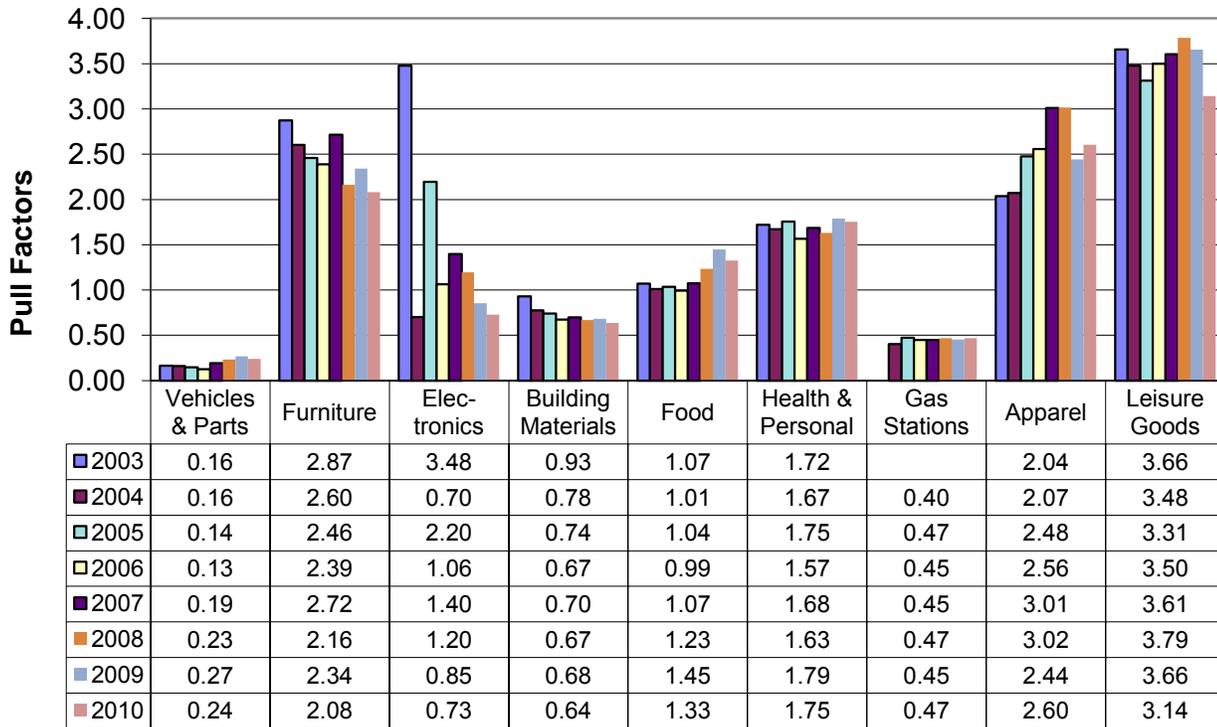
These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide,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

Recent Trends By Merchandise Category

Woodbury

The following tables and charts depict pull factors in Woodbury 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.

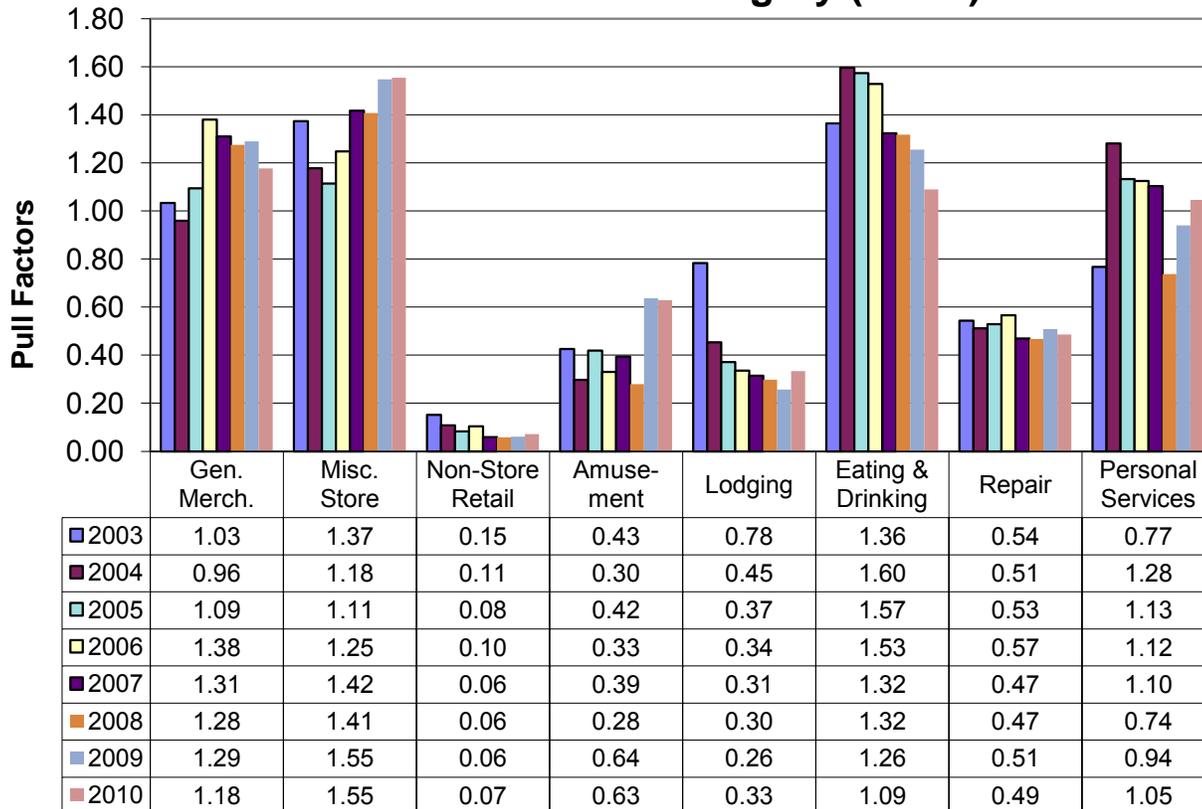
*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Recent Trends By Merchandise Category

Woodbury

The following tables and charts depict pull factors in Woodbury 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.

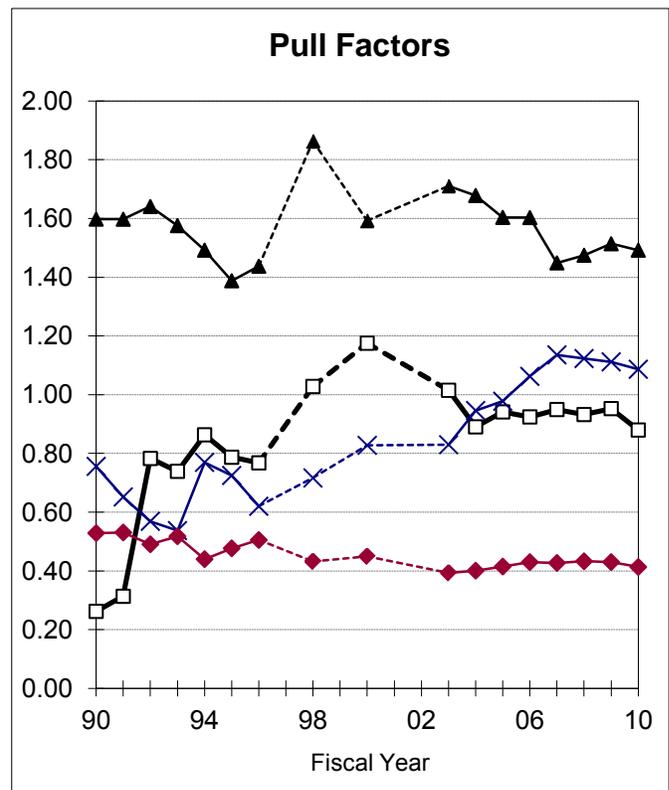
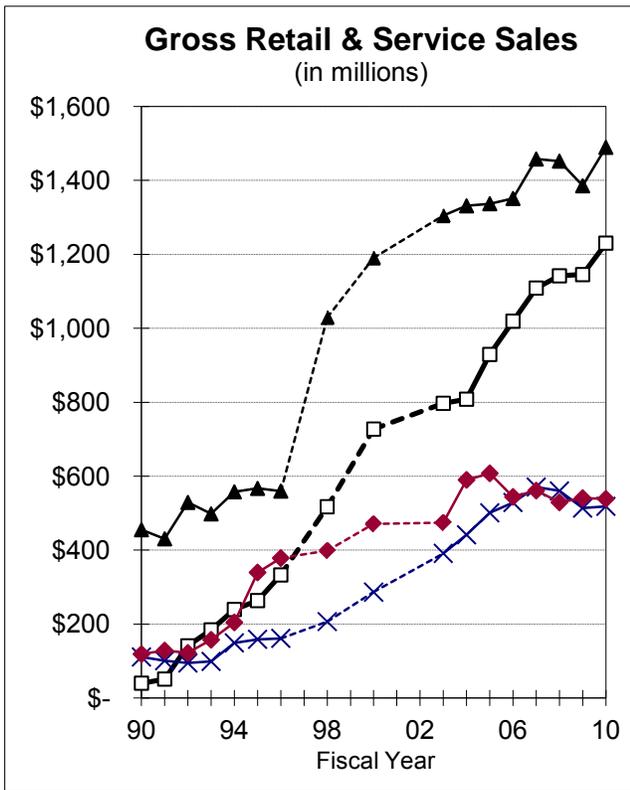
Eating & Drinking: Restaurants, donut shops, coffee house, cafeteria, caterers, taverns, and nightclubs,

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 Woodbury



□ Woodbury
× Oakdale

▲ Maplewood
◆ South St. Paul

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)
Woodbury	61,961	\$1,230.32	\$491.69	1,037	\$7,935	0.88
Maplewood	38,018	\$1,489.38	\$511.71	889	\$13,460	1.49
Oakdale	27,378	\$518.53	\$268.39	393	\$9,803	1.09
South St. Paul	20,160	\$538.68	\$75.19	256	\$3,730	0.41

Trade Area Analysis of Retail Sales

Woodbury

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	\$22.48	\$5.29	-\$17.19	-76.5%	-47,391	9	1.1%
Furniture Stores	\$24.55	\$45.76	+\$21.21	+86.4%	53,529	28	9.4%
Electronics	\$33.99	\$14.66	-\$19.33	-56.9%	-35,238	13	3.0%
Building Materials	\$63.28	\$32.37	-\$30.91	-48.9%	-30,269	8	6.6%
Food, Groceries	\$48.12	\$47.46	-\$0.67	-1.4%	-858	30	9.7%
Health, Personal Stores	\$11.13	\$12.01	+\$0.88	+7.9%	4,902	26	2.5%
Gasoline Stations	\$9.65	\$5.05	-\$4.61	-47.7%	-29,574	9	1.0%
Apparel	\$20.12	\$27.53	+\$7.40	+36.8%	22,785	81	5.6%
Leisure Goods	\$29.22	\$47.00	+\$17.78	+60.9%	37,711	56	9.6%
General Merchandise Stores	\$90.86	\$74.45	-\$16.41	-18.1%	-11,192	7	15.2%
Miscellaneous Retail	\$28.93	\$28.57	-\$0.37	-1.3%	-782	92	5.8%
Amusement & Recreation	\$14.06	\$10.67	-\$3.38	-24.1%	-14,909	24	2.2%
Accommodations	\$25.22	\$6.28	-\$18.94	-75.1%	-46,525	9	1.3%
Eating & Drinking Places	\$112.19	\$86.51	-\$25.68	-22.9%	-14,181	105	17.7%
Repair, Maintenance	\$12.97	\$6.27	-\$6.70	-51.6%	-31,992	34	1.3%
Personal Services, Laundry	\$11.28	\$9.30	-\$1.98	-17.5%	-10,850	79	1.9%
Total Taxable Retail & Service	\$649.97	\$489.18	-\$160.78	-24.7%	-15,327	1,037	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 Woodbury Retail Trade

The chart below depicts the percentage amount Woodbury's actual sales were above or below expected sales in 2010 by merchandise group. Of the 16 merchandise categories with reported data, sales in 4 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 86.4 percent surplus. Overall, Woodbury had a retail sales leakage of 24.7 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 50,000 & 400,000

(16 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																		
Minneapolis	382,578	0.36	0.71	0.34	0.57	1.00	0.85	0.51	0.61	0.72	0.31	0.93	0.47	2.56	1.92	0.63	2.41	0.92
St Paul	285,068	0.35	0.42	1.51	0.62	0.99	0.94	0.63	0.52	0.39	0.43	0.83	0.35	0.86	1.07	0.69	2.30	0.84
Rochester	106,769	1.45	1.79	1.60	1.57	1.27	1.07	0.91	1.66	2.17	2.34	1.67	0.61	2.90	1.48	0.96	0.90	1.28
Duluth	86,265	1.15	0.70	1.70	0.96	1.20	1.96	1.08	1.84	1.82	0.97	1.51	0.99	2.77	1.43	0.74	0.95	1.10
Bloomington	82,893	2.91	2.93	3.61	0.82	1.67	4.12	1.35	5.84	3.79	1.60	3.20	0.71	7.79	2.13	1.87	1.45	3.08
Brooklyn Park	75,781	1.03	0.21	0.14	1.83	0.93	0.89	0.58	1.15	0.39	1.20	0.42	0.25	0.47	0.50	0.76	0.45	0.64
Plymouth	70,576	0.60	4.42	0.15	2.28	1.30	1.43	1.02	0.37	0.54		4.90	0.89	0.88	0.98	0.49	2.79	1.04
St Cloud	65,842	1.21	1.83	2.35	0.63	0.92	1.32	0.95	1.97	2.69	1.53	1.14	0.36	1.17	1.27	1.05	0.73	1.05
Eagan	64,206	0.57	1.20	1.91	0.54	1.18	1.23	1.22	1.90	0.86	1.28	1.36	0.85	1.26	1.38	0.99	1.35	0.93
Woodbury	61,961	0.24	3.32	0.73	0.64	1.33	1.75	0.47	2.60	3.14	1.18	1.55	0.63	0.33	1.09	0.49	1.05	0.88
Maple Grove	61,567	0.19	1.69	2.46	1.40	2.13	1.70	0.48	2.61	3.12	1.47	1.56	0.78	0.62	1.52	0.66	0.89	1.22
Coon Rapids	61,476	0.96	2.60	1.49	1.55	2.33	2.14	0.74	1.47	1.88	1.62	1.34	0.89	0.37	1.17	0.97	0.39	1.08
Eden Prairie	60,797	0.77	0.94	2.69	0.97	0.95	1.59	0.69	1.64	1.96	1.28	2.45	1.97	1.19	1.64	1.37	1.44	1.42
Burnsville	60,306	2.59	2.22	1.60	1.61	1.06	2.32	0.85	4.29	2.70	1.03	1.46	0.88	0.56	1.31	1.10	0.70	1.35
Blaine	57,186	1.04	0.28	2.23	2.12	1.18	1.65	0.80	1.82	2.37	2.25	0.78	1.14		1.17	1.42	1.26	1.13
Lakeville	55,954	0.82	2.26	0.96	0.66	1.09	0.80	0.99	0.29	0.70	1.28	0.40	1.10	0.23	0.73	1.06	0.39	0.69
Unadjusted Average: *		1.01	1.72	1.59	1.17	1.28	1.61	0.83	1.91	1.83	1.32	1.59	0.80	1.60	1.30	0.95	1.22	1.17

* 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 50,000 & 400,000

(16 Cities)

Rankings

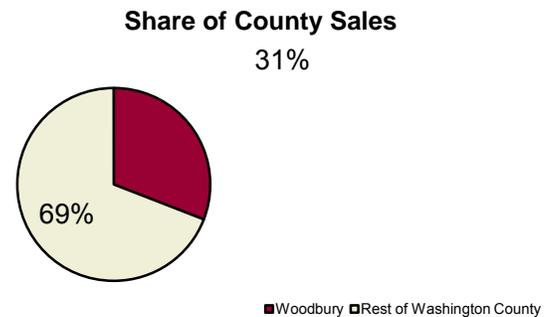
Town	Population	Vehicles, Parts	Furniture Stores	Elec- tronics	Building Materials	Food	Health, Personal	Gasoline Stations	Apparel	Leisure Goods	General Merch.	Misc.	Amuse- ment	Lodging	Eating & Drinking	Repair, Maint.	Personal Services	Taxable \$ Pull Factor
Town name																		
Minneapolis	# 1	# 13	# 12	# 14	# 15	# 12	# 15	# 14	# 13	# 12	# 15	# 12	# 13	# 4	# 2	# 14	# 2	# 12
St Paul	# 2	# 14	# 14	# 10	# 14	# 13	# 13	# 12	# 14	# 15	# 14	# 13	# 15	# 9	# 13	# 12	# 3	# 14
Rochester	# 3	# 3	# 8	# 8	# 5	# 6	# 12	# 7	# 9	# 7	# 1	# 4	# 12	# 2	# 5	# 9	# 10	# 4
Duluth	# 4	# 5	# 13	# 7	# 9	# 7	# 4	# 3	# 7	# 10	# 13	# 7	# 4	# 3	# 6	# 11	# 9	# 7
Bloomington	# 5	# 1	# 3	# 1	# 10	# 3	# 1	# 1	# 1	# 1	# 4	# 2	# 10	# 1	# 1	# 1	# 4	# 1
Brooklyn Park	# 6	# 7	# 16	# 16	# 3	# 15	# 14	# 13	# 12	# 16	# 10	# 15	# 16	# 12	# 16	# 10	# 14	# 16
Plymouth	# 7	# 11	# 1	# 15	# 1	# 5	# 9	# 4	# 15	# 14		# 1	# 5	# 8	# 14	# 15	# 1	# 10
St Cloud	# 8	# 4	# 7	# 4	# 13	# 16	# 10	# 6	# 5	# 5	# 5	# 11	# 14	# 7	# 9	# 6	# 12	# 9
Eagan	# 9	# 12	# 10	# 6	# 16	# 8	# 11	# 2	# 6	# 11	# 9	# 9	# 8	# 5	# 7	# 7	# 6	# 11
Woodbury	# 10	# 15	# 2	# 13	# 12	# 4	# 5	# 16	# 4	# 2	# 11	# 6	# 11	# 14	# 12	# 16	# 8	# 13
Maple Grove	# 11	# 16	# 9	# 3	# 7	# 2	# 6	# 15	# 3	# 3	# 6	# 5	# 9	# 10	# 4	# 13	# 11	# 5
Coon Rapids	# 12	# 8	# 4	# 11	# 6	# 1	# 3	# 10	# 11	# 9	# 3	# 10	# 6	# 13	# 10	# 8	# 15	# 8
Eden Prairie	# 13	# 10	# 11	# 2	# 8	# 14	# 8	# 11	# 10	# 8	# 7	# 3	# 1	# 6	# 3	# 3	# 5	# 2
Burnsville	# 14	# 2	# 6	# 9	# 4	# 11	# 2	# 8	# 2	# 4	# 12	# 8	# 7	# 11	# 8	# 4	# 13	# 3
Blaine	# 15	# 6	# 15	# 5	# 2	# 9	# 7	# 9	# 8	# 6	# 2	# 14	# 2		# 11	# 2	# 7	# 6
Lakeville	# 16	# 9	# 5	# 12	# 11	# 10	# 16	# 5	# 16	# 13	# 8	# 16	# 3	# 15	# 15	# 5	# 16	# 15

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.

Woodbury & Washington 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 Woodbury and Washington County in 2010. Woodbury accounted for 24 percent of the county's firms and 31 percent of the county's sales.



Sales by Merchandise Category, Woodbury & Washington County, 2010

Merchandise Category	Woodbury		Washington County		City's Share of County Total	
	Taxable Sales (\$millions)	Number of Firms	Taxable Sales (\$millions)	Number of Firms	Sales	Firms
Vehicles & Parts	\$5.29	9	\$55.48	87	9.5%	10.3%
Furniture Stores	\$45.76	28	\$55.40	99	82.6%	28.3%
Electronics	\$14.66	13	\$61.48	51	23.8%	25.5%
Building Materials	\$32.37	8	\$243.11	62	13.3%	12.9%
Food, Groceries	\$47.46	30	\$137.05	123	34.6%	24.4%
Health, Personal Stores	\$12.01	26	\$26.82	58	44.8%	44.8%
Gasoline Stations	\$5.05	9	\$31.99	62	15.8%	14.5%
Apparel	\$27.53	81	\$40.23	158	68.4%	51.3%
Leisure Goods	\$47.00	56	\$64.53	160	72.8%	35.0%
General Merchandise	\$74.45	7	\$272.20	30	27.4%	23.3%
Miscellaneous Retail	\$28.57	104	\$69.34	497	41.2%	20.9%
Non-Store Retailers	\$1.20	40	\$6.02	227	19.9%	17.6%
Amusement & Recreation	\$10.67	24	\$63.73	103	16.7%	23.3%
Accommodations	\$6.28	9	\$25.18	48	24.9%	18.8%
Eating & Drinking Places	\$86.51	105	\$264.39	396	32.7%	26.5%
Repair, Maintenance	\$6.27	34	\$31.28	246	20.1%	13.8%
Personal Service, Laundry	\$9.30	79	\$23.50	313	39.6%	25.2%
Total Sales*	\$491.69	1,037	\$1,590.71	4,338	30.9%	23.9%

Maplewood Retail Trade Overview

Total Taxable and Gross Retail Sales

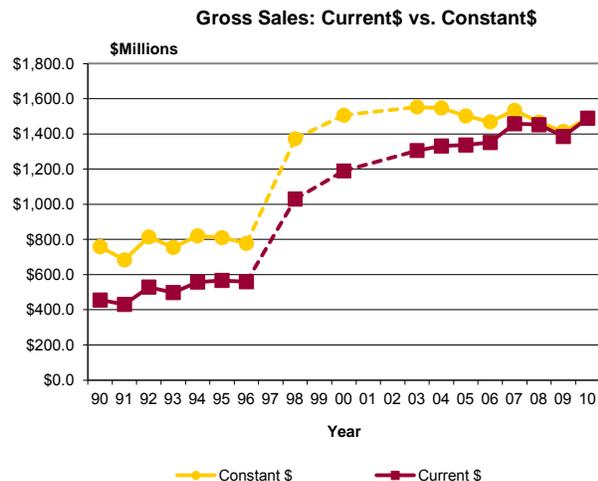
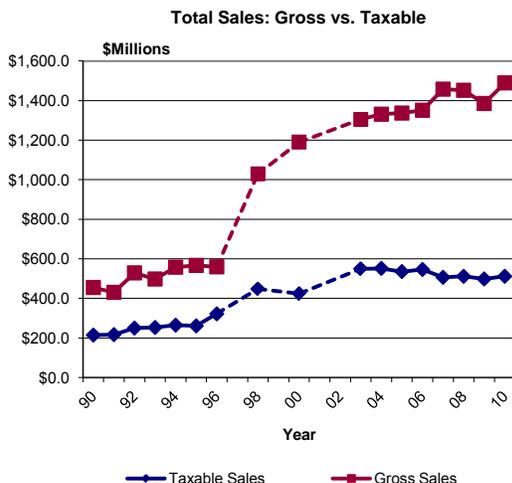
The table below presents gross and taxable retail and services sales for Maplewood from 1990 through 2010. Without inflation adjustments, taxable sales in Maplewood declined 6.8 percent from 2003 to 2010, while the number of firms rose 7.6 percent. Statewide, taxable sales increased 6.1 percent over 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 in 2010. For example, in 1990, taxable sales in Maplewood totaled \$214.71 million, an amount worth \$357.85 million in 2010 dollars. In constant dollars, gross sales fell 4.1 percent between 2003 and 2010. Constant dollar taxable sales decreased 21.7 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	30,570	\$455.21	\$214.71	\$758.69	\$357.85	525	\$7,024	1.60
1991	30,994	\$430.60	\$217.07	\$683.49	\$344.56	538	\$7,004	1.60
1992	31,492	\$529.05	\$250.03	\$813.93	\$384.66	559	\$7,939	1.64
1993	31,852	\$498.04	\$252.99	\$754.60	\$383.32	577	\$7,943	1.58
1994	32,429	\$557.79	\$264.86	\$820.28	\$389.51	581	\$8,167	1.49
1995	32,975	\$566.96	\$261.06	\$809.94	\$372.94	560	\$7,917	1.39
1996	33,447	\$559.62	\$321.90	\$777.25	\$447.08	570	\$9,624	1.44
1997	34,078	NA	NA	NA	NA	NA	\$0	NA
1998	34,560	\$1,029.51	\$448.51	\$1,372.68	\$598.01	587	\$12,978	1.86
1999	34,920	NA	NA	NA	NA	NA	\$0	NA
2000	34,947	\$1,190.24	\$423.20	\$1,506.63	\$535.70	590	\$12,110	1.59
2001	35,651	NA	NA	NA	NA	NA	\$0	NA
2002	35,993	NA	NA	NA	NA	NA	\$0	NA
2003	35,945	\$1,304.71	\$548.77	\$1,553.23	\$653.30	826	\$15,267	1.71
2004	35,528	\$1,331.16	\$551.85	\$1,547.86	\$641.68	826	\$15,533	1.68
2005	35,074	\$1,336.92	\$535.70	\$1,502.16	\$601.91	839	\$15,274	1.60
2006	35,484	\$1,351.11	\$546.30	\$1,468.60	\$593.81	843	\$15,396	1.60
2007	35,971	\$1,457.76	\$506.56	\$1,534.48	\$533.22	887	\$14,082	1.45
2008	36,303	\$1,452.09	\$511.71	\$1,466.75	\$516.88	871	\$14,096	1.47
2009	36,762	\$1,385.38	\$498.44	\$1,413.65	\$508.61	877	\$13,558	1.51
2010	38,018	\$1,489.38	\$511.71	\$1,489.38	\$511.71	889	\$13,460	1.49
7 yr Change '03 to '10	5.8%	14.2%	-6.8%	-4.1%	-21.7%	7.6%	-11.8%	-12.8%
3 yr Change '07 to '10	5.7%	2.2%	1.0%	-2.9%	-4.0%	0.2%	-4.4%	3.0%

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

Maplewood: Total Retail Sales

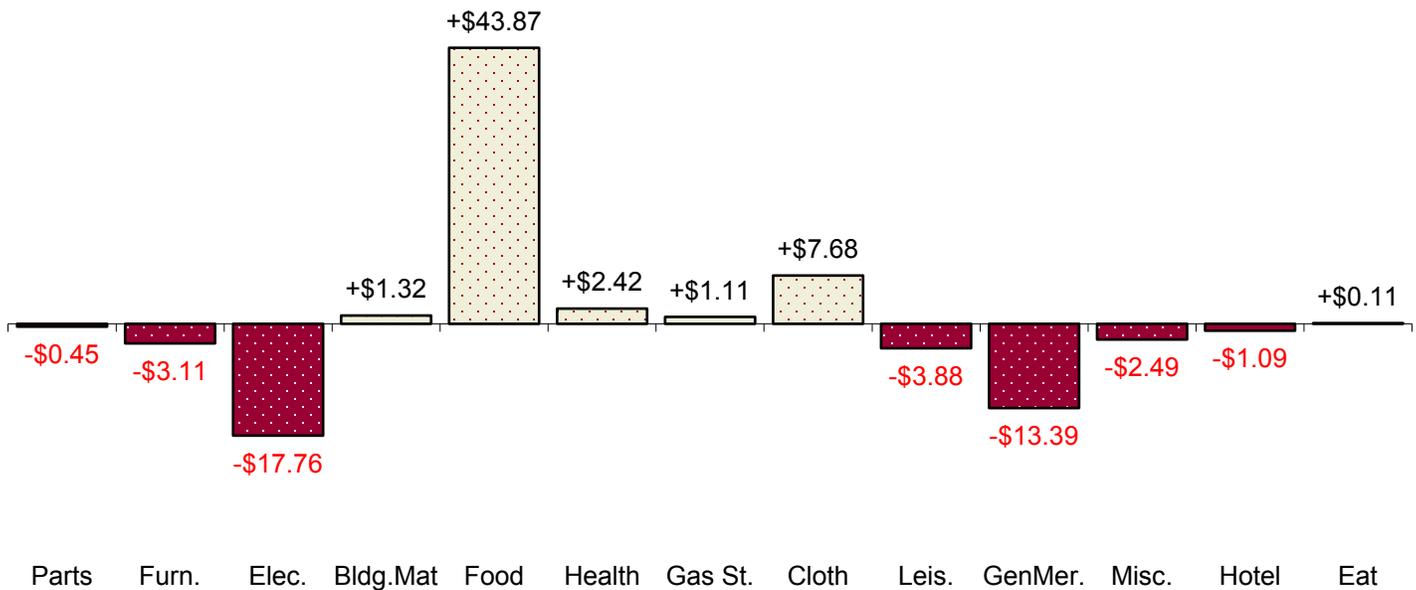


Maplewood Components of Change, 2007 to 2010

Category	Taxable Sales 2007	Taxable Sales 2010	Dollar Change	Percent Change
Vehicles & Parts	\$43,748,936	\$43,302,794	-\$446,142	-1.02%
Furniture Stores	\$13,966,027	\$10,857,323	-\$3,108,704	-22.26%
Electronics	\$64,102,147	\$46,338,952	-\$17,763,195	-27.71%
Building Materials	\$75,764,499	\$77,085,243	+\$1,320,744	+1.74%
Food, Groceries	\$26,504,879	\$70,379,735	+\$43,874,856	+165.54%
Health, Personal Stores	\$8,677,570	\$11,101,469	+\$2,423,899	+27.93%
Gasoline Stations	\$5,142,894	\$6,248,327	+\$1,105,433	+21.49%
Apparel	\$30,724,942	\$38,404,656	+\$7,679,714	+25.00%
Leisure Goods	\$33,752,441	\$29,871,457	-\$3,880,984	-11.50%
General Merchandise Stores	\$32,217,618	\$18,830,518	-\$13,387,100	-41.55%
Miscellaneous Retail	\$27,740,367	\$25,246,050	-\$2,494,317	-8.99%
Accommodations	\$2,307,818	\$1,217,908	-\$1,089,910	-47.23%
Eating & Drinking	+\$76,232,495	+\$76,345,872	+\$113,377	+0.15%
Total Retail and Services Sales	\$506,557,391	\$511,706,736	+\$5,149,345	+1.02%

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 to 2010



Historical Trends By Merchandise Category Maplewood

The following tables and charts depict pull factors in Maplewood 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

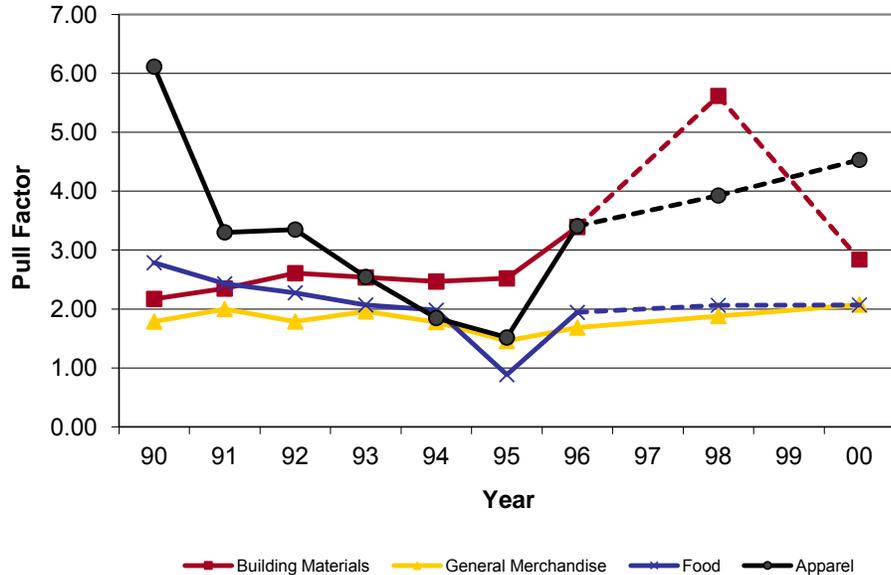
Building Materials: Includes retail establishments primarily engaged in selling lumber and other building materials; paint, glass, and wallpaper; hardware; nursery stock; and lawn and garden supplies.

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.

Pull Factors by Merchandise Category (1 of 3)



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

Year	Building Materials	General Merchandise	Food	Apparel
1990	2.17	1.79	2.79	6.11
1991	2.35	2.00	2.43	3.30
1992	2.61	1.79	2.28	3.35
1993	2.54	1.96	2.07	2.54
1994	2.47	1.78	1.98	1.85
1995	2.52	1.46	0.88	1.52
1996	3.39	1.69	1.94	3.41
1997	NA	NA	NA	NA
1998	5.61	1.88	2.06	3.93
1999	NA	NA	NA	NA
2000	2.84	2.08	2.07	4.53

% Change, '90 to '00 30.79% 16.17% -25.70% -25.92%

% Change, '98 to '00 -49.44% 10.33% 0.33% 15.37%

*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.

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 Maplewood

The following tables and charts depict pull factors in Maplewood 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.

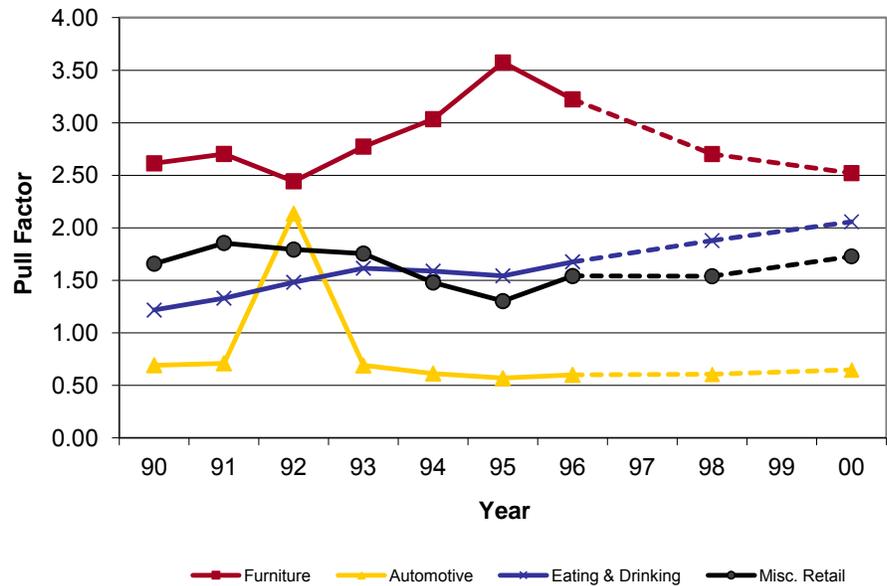
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

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
Maplewood, 1990-2000**

Year	Furniture	Automotive	Eating & Drinking	Misc. Retail
1990	2.61	0.69	1.22	1.66
1991	2.70	0.71	1.33	1.86
1992	2.44	2.14	1.48	1.79
1993	2.77	0.69	1.62	1.75
1994	3.03	0.61	1.59	1.48
1995	3.57	0.57	1.54	1.30
1996	3.22	0.60	1.68	1.54
1997	NA	NA	NA	NA
1998	2.70	0.61	1.88	1.54
1999	NA	NA	NA	NA
2000	2.52	0.65	2.06	1.73
% Change, '90 to '00	-3.58%	-6.33%	69.04%	4.18%
% Change, '98 to '00	-6.76%	6.65%	9.56%	12.26%

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 Maplewood

The following tables and charts depict pull factors in Maplewood 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.

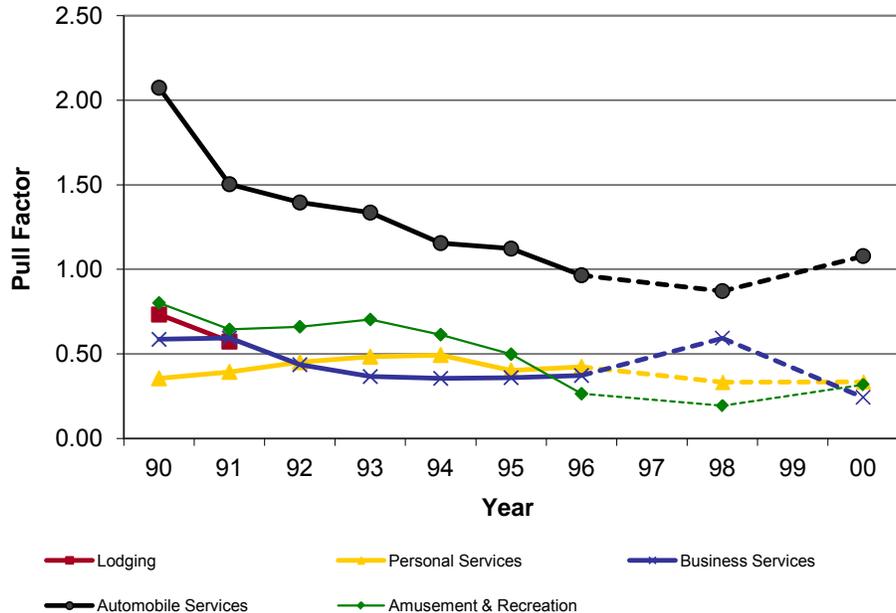
Business Services: Includes establishments primarily engaged in providing services, not elsewhere classified, to business establishments on a contract or fee basis.

Automobile Services: Includes establishments primarily engaged in 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.

*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
Maplewood, 1990-2000**

Year	Lodging	Personal Services	Business Services	Automobile Services	Amusement & Recreation
1990	0.73	0.36	0.59	2.07	0.80
1991	0.57	0.39	0.59	1.50	0.65
1992	NA	0.45	0.44	1.40	0.66
1993	NA	0.48	0.37	1.34	0.70
1994	NA	0.49	0.36	1.16	0.61
1995	NA	0.40	0.36	1.12	0.50
1996	NA	0.42	0.37	0.97	0.27
1997	NA	NA	NA	NA	NA
1998	NA	0.33	0.59	0.87	0.19
1999	NA	NA	NA	NA	NA
2000	NA	0.34	0.24	1.08	0.32
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% Change, '90 to '00	NA	-5.79%	-58.53%	-48.01%	-60.36%
% Change, '98 to '00	NA	0.81%	-59.05%	23.64%	63.94%

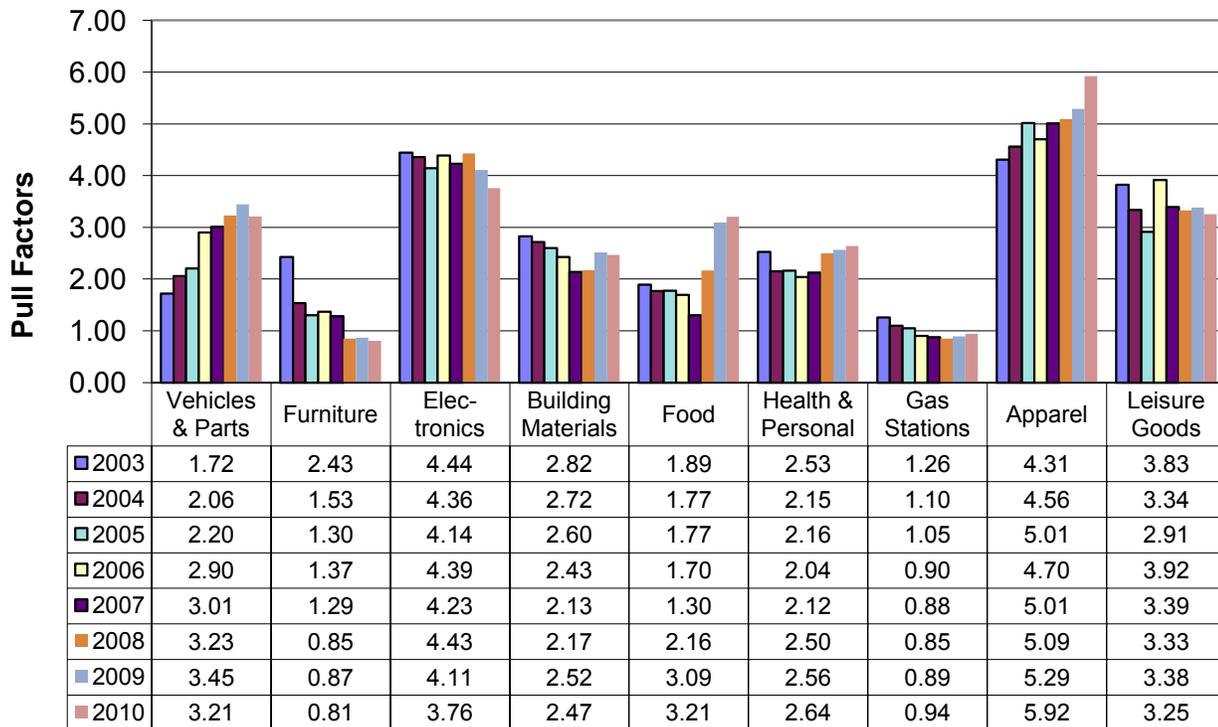
These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide,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

Recent Trends By Merchandise Category

Maplewood

The following tables and charts depict pull factors in Maplewood 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.

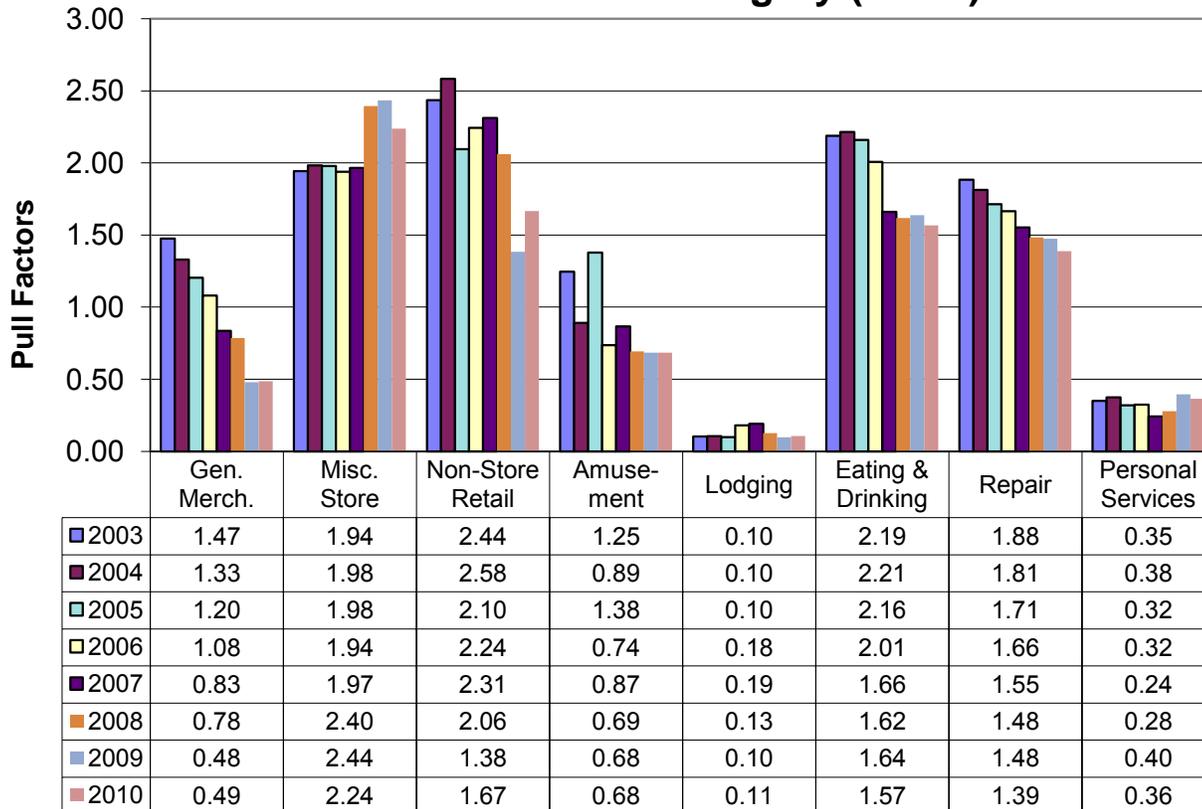
*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Recent Trends By Merchandise Category

Maplewood

The following tables and charts depict pull factors in Maplewood 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.

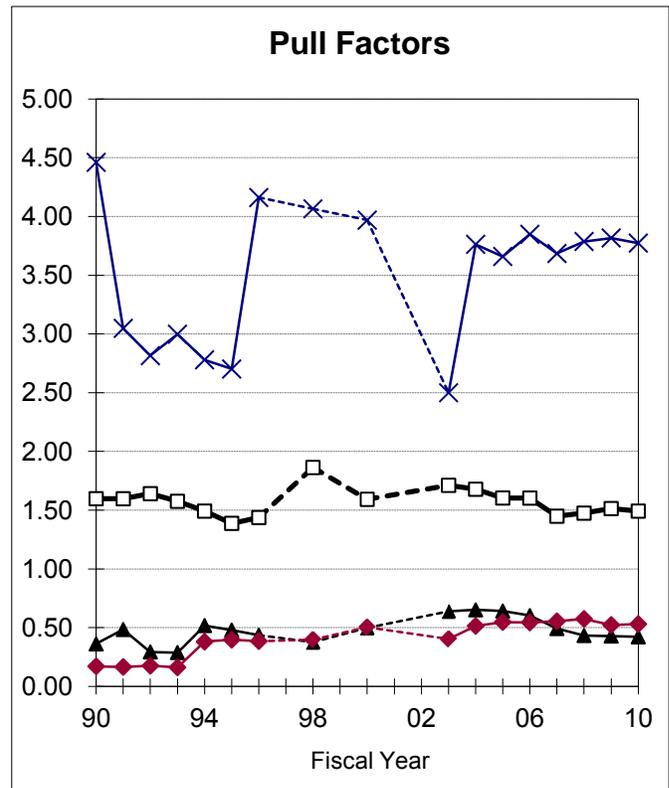
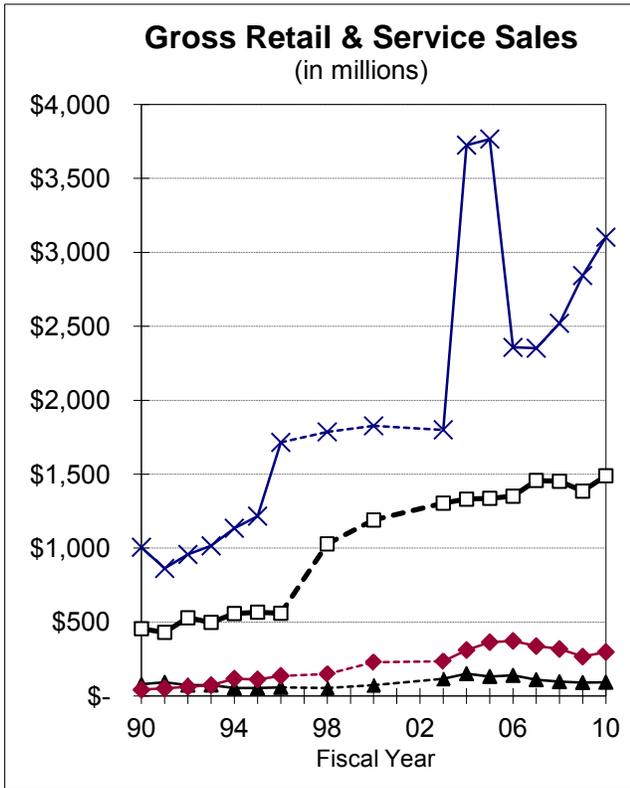
Eating & Drinking: Restaurants, donut shops, coffee house, cafeteria, caterers, taverns, and nightclubs,

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 Maplewood



Maplewood
 Roseville

North St. Paul
 Shoreview

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)
Maplewood	38,018	\$1,489.38	\$511.71	889	\$13,460	1.49
North St. Paul	11,460	\$93.57	\$43.59	160	\$3,804	0.42
Roseville	33,660	\$3,102.59	\$1,145.75	1,033	\$34,039	3.77
Shoreview	25,043	\$297.83	\$119.95	397	\$4,790	0.53

Trade Area Analysis of Retail Sales

Maplewood

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	\$15.66	\$43.30	+\$27.64	+176.5%	67,115	26	8.7%
Furniture Stores	\$8.27	\$10.86	+\$2.59	+31.3%	11,889	15	2.2%
Electronics	\$20.01	\$46.34	+\$26.33	+131.6%	50,018	21	9.3%
Building Materials	\$42.77	\$77.09	+\$34.32	+80.2%	30,502	12	15.5%
Food, Groceries	\$25.66	\$70.38	+\$44.72	+174.3%	66,274	36	14.1%
Health, Personal Stores	\$5.44	\$11.10	+\$5.67	+104.2%	39,630	25	2.2%
Gasoline Stations	\$6.72	\$6.25	-\$0.48	-7.1%	-2,691	16	1.3%
Apparel	\$7.01	\$38.40	+\$31.40	+448.0%	170,324	69	7.7%
Leisure Goods	\$9.17	\$29.87	+\$20.70	+225.8%	85,850	34	6.0%
General Merchandise Stores	\$74.52	\$18.83	-\$55.69	-74.7%	-28,411	9	3.8%
Miscellaneous Retail	\$23.09	\$25.25	+\$2.16	+9.3%	3,555	76	5.1%
Amusement & Recreation	\$7.79	\$7.12	-\$0.67	-8.6%	-3,276	20	1.4%
Accommodations	\$11.50	\$1.22	-\$10.28	-89.4%	-33,992	4	0.2%
Eating & Drinking Places	\$53.40	\$76.35	+\$22.95	+43.0%	16,340	95	15.3%
Repair, Maintenance	\$7.55	\$11.01	+\$3.46	+45.8%	17,412	56	2.2%
Personal Services, Laundry	\$3.78	\$1.98	-\$1.79	-47.5%	-18,042	46	0.4%
Total Taxable Retail & Service	\$332.65	\$498.44	+\$165.78	+49.8%	18,947	889	100.0%

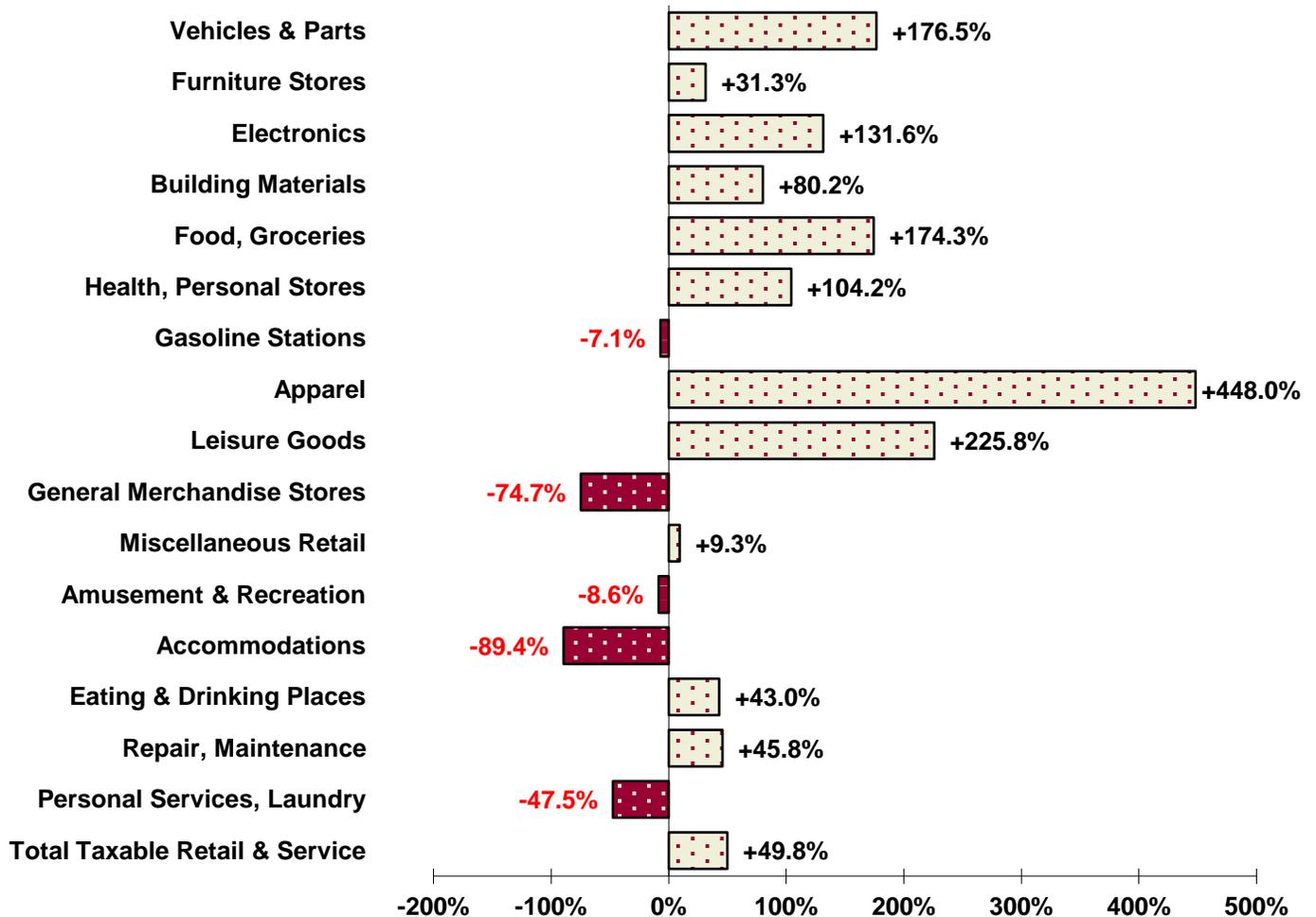
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of Maplewood Retail Trade

The chart below depicts the percentage amount Maplewood's actual sales were above or below expected sales in 2010 by merchandise group. Of the 16 merchandise categories with reported data, sales in 11 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 Apparel category, which has a 448 percent surplus. Overall, Maplewood had a retail sales surplus of 49.8 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 22,000 & 51,500 (Range: Population of Maplewood +/- ~ 40%.) (31 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																		
Minnetonka	49,734	2.39	1.70	4.61	0.41	1.46	2.39	0.70	6.06	4.39	1.81	2.56	0.77	1.96	1.53	0.77	7.69	1.65
Apple Valley	49,084	1.13	0.82	2.35	1.89	0.94	1.17	0.65	1.25	1.27	2.49	2.02	0.29	0.18	1.05	1.30	1.47	1.09
Edina	47,941	0.57	7.02	3.20	0.45	1.36	3.96	0.44	7.83	3.11	1.54	1.73	1.50	1.13	2.16	0.81	3.09	1.79
St Louis Park	45,250	1.21	1.84	3.69	1.43	3.96	0.93	0.59	3.59	1.39	1.05	2.27	1.69	1.71	1.37	0.90	1.23	1.49
Mankato	39,309	2.59	1.89	2.28	2.70	1.77	1.88	1.11	1.93	3.20	3.37	2.31	0.60	1.17	1.98	1.57	0.89	2.26
Moorhead	38,065	0.57	0.87	0.03	1.23	0.86	1.41	0.93	0.31	0.46	0.73	0.72	0.47	0.50	0.74	0.81	0.26	0.56
Maplewood	38,018	3.21	1.29	3.76	2.47	3.21	2.64	0.94	5.92	3.25	0.49	2.24	0.68	0.11	1.57	1.39	0.36	1.49
Shakopee	37,076	1.47	2.05	1.48	1.49	0.82	0.92	1.19	0.78	0.57	2.43	0.83	3.90	0.48	0.99	0.88	0.45	1.10
Richfield	35,228	1.09	0.55	5.96	1.72	1.05	1.00	0.66	0.43	3.62	1.17	2.30	0.23	1.08	1.10	0.93	0.84	1.22
Cottage Grove	34,589	0.75	0.00		1.16	1.04	0.91	0.72	0.69	0.00		2.41	0.23		0.50	0.51	0.24	0.43
Inver Grove Heigl	33,880	1.94	0.44	2.25	1.64	0.81	1.29	2.84	0.00	0.03		6.59	0.87		0.65	1.38	0.32	0.87
Roseville	33,660	1.66	5.70	8.46	0.82	1.41	4.86	1.17	9.51	7.55	1.92	3.37	51.90	1.98	2.82	1.78	1.32	3.77
Andover	30,598	0.17				0.82	0.72	0.49	0.02	0.35		2.55	0.18		0.34	0.69	0.26	0.26
Brooklyn Center	30,104	1.71	0.47	1.49		0.81	0.93	1.10	5.19	0.46	0.93	1.47	0.20	1.38	0.81	0.49	0.15	0.70
Winona	27,592	1.02	0.40	0.56	1.58	1.03	0.78	1.81	0.15	0.42	2.66	0.44	0.26	0.95	1.55	0.96	0.34	1.03
Oakdale	27,378	0.84	1.12	4.94	2.43	0.75	0.84	0.69	0.09	1.15	2.00	0.19	1.72	0.79	0.83	0.48	0.29	1.09
Fridley	27,208	2.00	2.18		2.70	0.66	0.88	1.15	0.02	0.15	2.81	1.63			1.02	1.62	4.92	1.24
Savage	26,911	0.61	0.37	0.08	0.25	1.15	0.20	1.11	0.03	0.50		4.21	0.86		1.07	0.94	0.74	0.58
Owatonna	25,599	1.32	0.38	0.10	1.12	1.36	0.88	1.21	0.91	5.92	2.28	0.71	0.65	0.98	1.10	1.00	0.60	1.05
Shoreview	25,043		0.07	1.17		0.61	0.05	0.93	0.07	0.04		4.76			0.46	1.11	0.23	0.53
Unadjusted Average: *		1.39	1.69	3.01	1.52	1.33	1.54	1.02	2.43	1.77	1.81	2.21	3.90	1.03	1.23	1.01	1.38	1.26

* 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 22,000 & 51,500 (Range: Population of Maplewood +/- ~ 40%.) (31 Cities)

Rankings

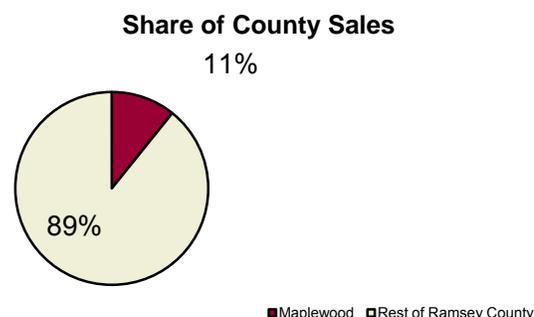
Town	Population	Vehicles, Parts	Furniture Stores	Elec- tronics	Building Materials	Food	Health, Personal	Gasoline Stations	Apparel	Leisure Goods	General Merch.	Misc.	Amuse- ment	Lodging	Eating & Drinking	Repair, Maint.	Personal Services	Taxable \$ Pull Factor
Town name																		
Minnetonka	# 1	# 3	# 7	# 4	# 16	# 4	# 4	# 14	# 3	# 3	# 9	# 5	# 8	# 2	# 6	# 16	# 1	# 4
Apple Valley	# 2	# 11	# 11	# 8	# 5	# 12	# 8	# 17	# 8	# 9	# 4	# 12	# 13	# 13	# 11	# 6	# 4	# 11
Edina	# 3	# 18	# 1	# 7	# 15	# 7	# 2	# 20	# 2	# 7	# 10	# 13	# 5	# 6	# 2	# 14	# 3	# 3
St Louis Park	# 4	# 10	# 6	# 6	# 10	# 1	# 10	# 18	# 6	# 8	# 12	# 10	# 4	# 3	# 7	# 12	# 6	# 5
Mankato	# 5	# 2	# 5	# 9	# 2	# 3	# 5	# 7	# 7	# 6	# 1	# 8	# 11	# 5	# 3	# 3	# 7	# 2
Moorhead	# 6	# 17	# 10	# 17	# 11	# 13	# 6	# 12	# 13	# 13	# 14	# 17	# 12	# 11	# 16	# 15	# 17	# 17
Maplewood	# 7	# 1	# 8	# 5	# 3	# 2	# 3	# 10	# 4	# 5	# 15	# 11	# 9	# 14	# 4	# 4	# 12	# 6
Shakopee	# 8	# 8	# 4	# 12	# 9	# 15	# 12	# 4	# 10	# 11	# 5	# 16	# 2	# 12	# 13	# 13	# 11	# 9
Richfield	# 9	# 12	# 12	# 2	# 6	# 9	# 9	# 16	# 12	# 4	# 11	# 9	# 15	# 7	# 8	# 11	# 8	# 8
Cottage Grove	# 10	# 15	# 19		# 12	# 10	# 13	# 13	# 11	# 20		# 7	# 16		# 18	# 18	# 18	# 19
Inver Grove Heigl	# 11	# 5	# 14	# 10	# 7	# 16	# 7	# 1	# 20	# 19		# 1	# 6		# 17	# 5	# 14	# 14
Roseville	# 12	# 7	# 2	# 1	# 14	# 5	# 1	# 5	# 1	# 1	# 8	# 4	# 1	# 1	# 1	# 1	# 5	# 1
Andover	# 13	# 19				# 14	# 18	# 19	# 18	# 16		# 6	# 18		# 20	# 17	# 16	# 20
Brooklyn Center	# 14	# 6	# 13	# 11		# 17	# 11	# 9	# 5	# 14	# 13	# 15	# 17	# 4	# 15	# 19	# 20	# 15
Winona	# 15	# 13	# 15	# 14	# 8	# 11	# 17	# 2	# 14	# 15	# 3	# 19	# 14	# 9	# 5	# 9	# 13	# 13
Oakdale	# 16	# 14	# 9	# 3	# 4	# 18	# 16	# 15	# 15	# 10	# 7	# 20	# 3	# 10	# 14	# 20	# 15	# 10
Fridley	# 17	# 4	# 3		# 1	# 19	# 15	# 6	# 19	# 17	# 2	# 14			# 12	# 2	# 2	# 7
Savage	# 18	# 16	# 17	# 16	# 17	# 8	# 19	# 8	# 17	# 12		# 3	# 7		# 10	# 10	# 9	# 16
Owatonna	# 19	# 9	# 16	# 15	# 13	# 6	# 14	# 3	# 9	# 2	# 6	# 18	# 10	# 8	# 9	# 8	# 10	# 12
Shoreview	# 20		# 18	# 13		# 20	# 20	# 11	# 16	# 18		# 2			# 19	# 7	# 19	# 18

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.

Maplewood & Ramsey 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 Maplewood and Ramsey County in 2010. Maplewood accounted for 9 percent of the county's firms and 11 percent of the county's sales.



Sales by Merchandise Category, Maplewood & Ramsey County, 2010

Merchandise Category	Maplewood		Ramsey County		City's Share of County Total	
	Taxable Sales (\$millions)	Number of Firms	Taxable Sales (\$millions)	Number of Firms	Sales	Firms
Vehicles & Parts	\$43.30	26	\$158.83	146	27.3%	17.8%
Furniture Stores	\$10.86	15	\$115.01	169	9.4%	8.9%
Electronics	\$46.34	21	\$307.72	126	15.1%	16.7%
Building Materials	\$77.09	12	\$270.95	94	28.4%	12.8%
Food, Groceries	\$70.38	36	\$329.82	388	21.3%	9.3%
Health, Personal Stores	\$11.10	25	\$75.02	177	14.8%	14.1%
Gasoline Stations	\$6.25	16	\$70.38	172	8.9%	9.3%
Apparel	\$38.40	69	\$122.60	376	31.3%	18.4%
Leisure Goods	\$29.87	34	\$139.96	334	21.3%	10.2%
General Merchandise	\$18.83	9	\$383.32	68	4.9%	13.2%
Miscellaneous Retail	\$25.25	91	\$163.28	1008	15.5%	9.0%
Non-Store Retailers	\$17.14	55	\$45.15	468	38.0%	11.8%
Amusement & Recreation	\$7.12	20	\$536.50	146	1.3%	13.7%
Accommodations	\$1.22	4	\$115.08	47	1.1%	8.5%
Eating & Drinking Places	\$76.35	95	\$777.37	1145	9.8%	8.3%
Repair, Maintenance	\$11.01	56	\$95.94	530	11.5%	10.6%
Personal Service, Laundry	\$1.98	46	\$114.03	671	1.7%	6.9%
Total Sales*	\$511.71	889	\$4,746.25	9,925	10.8%	9.0%

North St. Paul Retail Trade Overview

Total Taxable and Gross Retail Sales

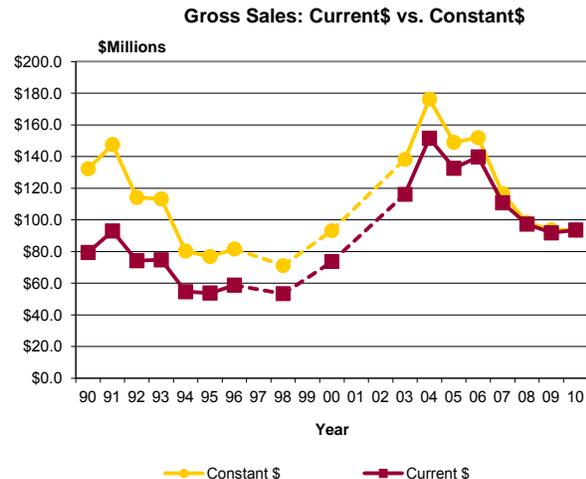
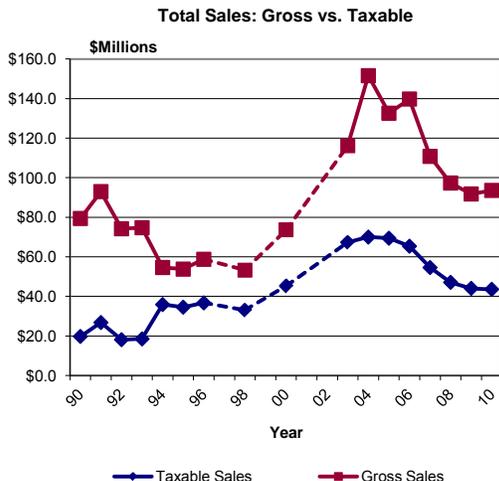
The table below presents gross and taxable retail and services sales for North St. Paul from 1990 through 2010. Without inflation adjustments, taxable sales in North St. Paul declined 35.3 percent from 2003 to 2010, while the number of firms fell 10.6 percent. Statewide, taxable sales increased 6.1 percent 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 in 2010. For example, in 1990, taxable sales in North St. Paul totaled \$19.75 million, an amount worth \$32.92 million in 2010 dollars. In constant dollars, gross sales fell 32.3 percent between 2003 and 2010. Constant dollar taxable sales decreased 45.7 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	12,424	\$79.39	\$19.75	\$132.31	\$32.92	197	\$1,590	0.36
1991	12,608	\$92.97	\$26.79	\$147.58	\$42.53	205	\$2,125	0.48
1992	12,747	\$74.20	\$18.12	\$114.16	\$27.88	191	\$1,421	0.29
1993	12,731	\$74.73	\$18.52	\$113.23	\$28.05	184	\$1,454	0.29
1994	12,656	\$54.61	\$35.89	\$80.30	\$52.78	61	\$2,836	0.52
1995	12,618	\$53.78	\$34.55	\$76.83	\$49.35	74	\$2,738	0.48
1996	12,571	\$58.75	\$36.71	\$81.60	\$50.99	88	\$2,920	0.44
1997	12,588	NA	NA	NA	NA	NA	\$0	NA
1998	12,598	\$53.32	\$33.08	\$71.10	\$44.10	91	\$2,625	0.38
1999	12,599	NA	NA	NA	NA	NA	\$0	NA
2000	11,929	\$73.67	\$45.24	\$93.25	\$57.26	98	\$3,792	0.50
2001	11,936	NA	NA	NA	NA	NA	\$0	NA
2002	11,828	NA	NA	NA	NA	NA	\$0	NA
2003	11,839	\$116.13	\$67.40	\$138.25	\$80.23	179	\$5,693	0.64
2004	11,600	\$151.56	\$69.99	\$176.24	\$81.38	179	\$6,034	0.65
2005	11,351	\$132.59	\$69.41	\$148.98	\$77.99	184	\$6,115	0.64
2006	11,293	\$139.77	\$65.38	\$151.92	\$71.06	181	\$5,789	0.60
2007	11,397	\$110.79	\$54.59	\$116.62	\$57.46	186	\$4,790	0.49
2008	11,372	\$97.32	\$47.12	\$98.30	\$47.59	161	\$4,143	0.43
2009	11,473	\$91.78	\$44.07	\$93.65	\$44.97	159	\$3,842	0.43
2010	11,460	\$93.57	\$43.59	\$93.57	\$43.59	160	\$3,804	0.42
7 yr Change '03 to '10								
	-3.2%	-19.4%	-35.3%	-32.3%	-45.7%	-10.6%	-33.2%	-33.9%
3 yr Change '07 to '10								
	0.6%	-15.5%	-20.2%	-19.8%	-24.1%	-14.0%	-20.6%	-14.4%

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

North St. Paul: Total Retail Sales

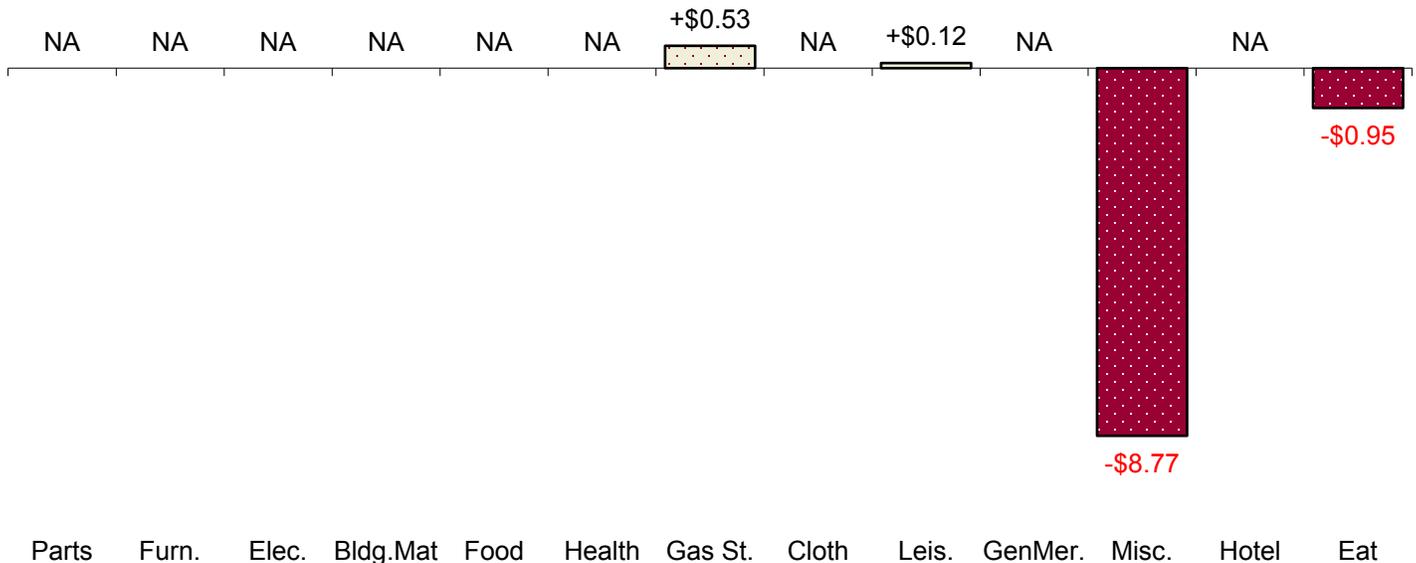


North St. Paul Components of Change, 2007 to 2010

Category	Taxable Sales 2007	Taxable Sales 2010	Dollar Change	Percent Change
Vehicles & Parts	NA	NA	NA	NA
Furniture Stores	NA	\$923,568	NA	NA
Electronics	NA	NA	NA	NA
Building Materials	NA	NA	NA	NA
Food, Groceries	\$2,159,780	NA	NA	NA
Health, Personal Stores	NA	NA	NA	NA
Gasoline Stations	\$1,913,931	\$2,446,974	+\$533,043	+27.85%
Apparel	NA	NA	NA	NA
Leisure Goods	\$33,560	\$155,493	+\$121,933	+363.33%
General Merchandise Stores	NA	NA	NA	NA
Miscellaneous Retail	\$38,603,792	\$29,838,552	-\$8,765,240	-22.71%
Accommodations	NA	NA	NA	NA
Eating & Drinking	+\$7,849,122	+\$6,900,526	-\$948,596	-12.09%
Total Retail and Services Sales	\$54,590,929	\$43,588,783	-\$11,002,146	-20.15%

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 to 2010



Historical Trends By Merchandise Category North St. Paul

The following tables and charts depict pull factors in North St. Paul 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.

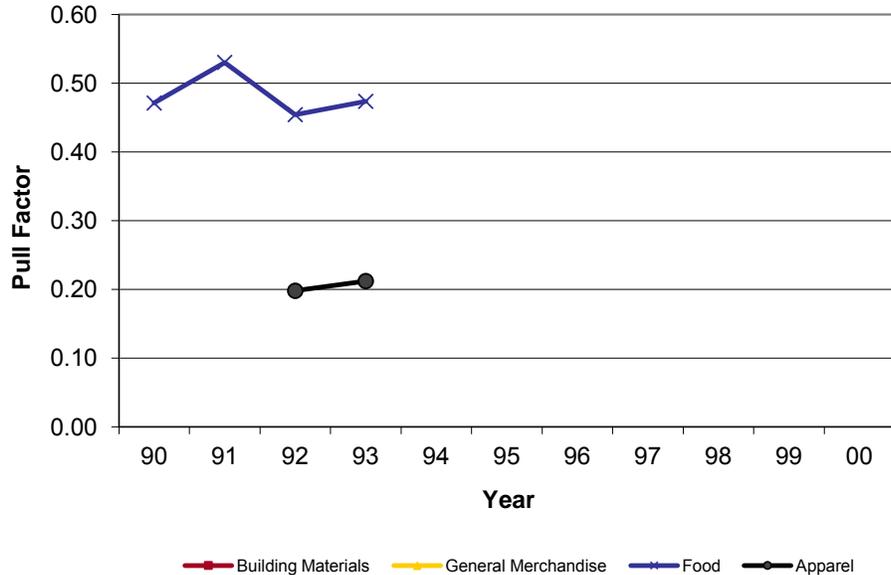
General Merchandise: Includes retail stores which sell a number of lines of merchandise, such as dry goods, apparel and accessories, furniture and home furnishings, small wares, hardware, and food. The stores included in this group are known as department stores, variety stores, general merchandise stores, 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
North St. Paul, 1990-2000

Year	Building Materials	General Merchandise	Food	Apparel
1990	NA	NA	0.47	NA
1991	NA	NA	0.53	NA
1992	NA	NA	0.45	0.20
1993	NA	NA	0.47	0.21
1994	NA	NA	NA	NA
1995	NA	NA	NA	NA
1996	NA	NA	NA	NA
1997	NA	NA	NA	NA
1998	NA	NA	NA	NA
1999	NA	NA	NA	NA
2000	NA	NA	NA	NA

% Change, '90 to '00

Building Materials	NA	NA	NA	NA
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% Change, '98 to '00

Building Materials	NA	NA	NA	NA
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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 North St. Paul

The following tables and charts depict pull factors in North St. Paul 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.

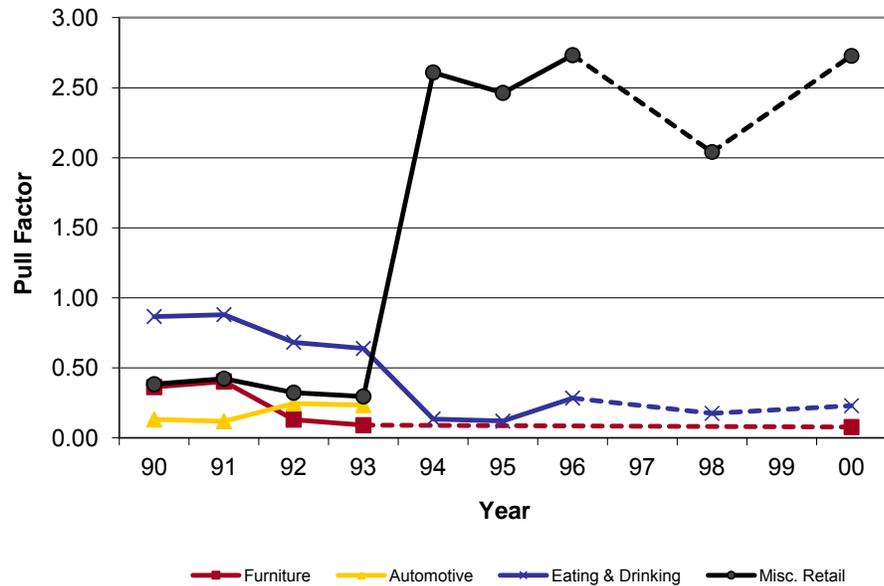
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

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 North St. Paul, 1990-2000

Year	Furniture	Automotive	Eating & Drinking	Misc. Retail
1990	0.36	0.13	0.87	0.38
1991	0.40	0.12	0.88	0.42
1992	0.13	0.25	0.68	0.32
1993	0.09	0.23	0.64	0.30
1994	NA	NA	0.14	2.61
1995	NA	NA	0.12	2.46
1996	NA	NA	0.29	2.73
1997	NA	NA	NA	NA
1998	NA	NA	0.18	2.04
1999	NA	NA	NA	NA
2000	0.08	NA	0.23	2.73

% Change, '90 to '00 -78.46% NA -73.40% 610.74%

% Change, '98 to '00 NA NA 31.36% 33.64%

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 North St. Paul

The following tables and charts depict pull factors in North St. Paul 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.

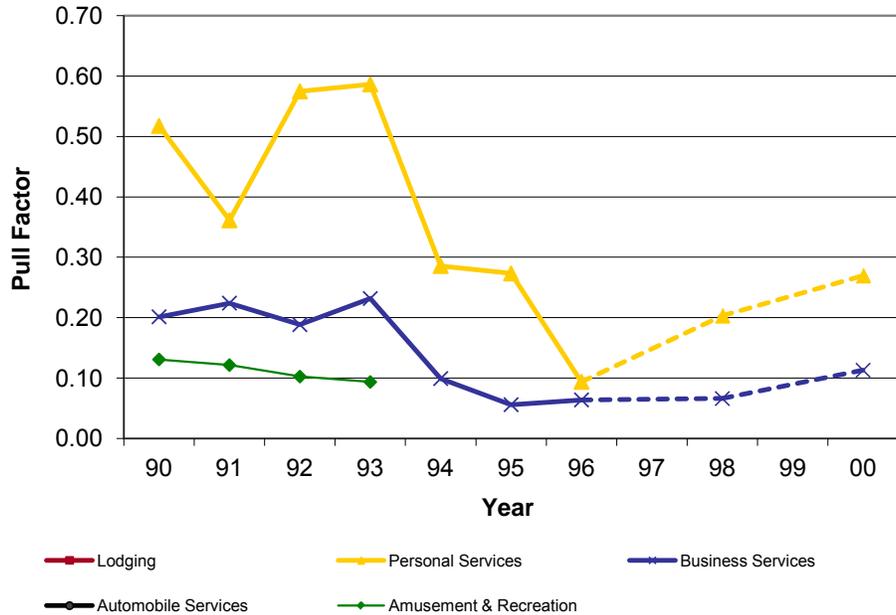
Business Services: Includes establishments primarily engaged in providing services, not elsewhere classified, to business establishments on a contract or fee basis.

Automobile Services: Includes establishments primarily engaged in 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.

*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
North St. Paul, 1990-2000**

Year	Lodging	Personal Services	Business Services	Automobile Services	Amusement & Recreation
1990	NA	0.52	0.20	NA	0.13
1991	NA	0.36	0.22	NA	0.12
1992	NA	0.57	0.19	NA	0.10
1993	NA	0.59	0.23	NA	0.09
1994	NA	0.29	0.10	NA	NA
1995	NA	0.27	0.06	NA	NA
1996	NA	0.09	0.06	NA	NA
1997	NA	NA	NA	NA	NA
1998	NA	0.20	0.07	NA	NA
1999	NA	NA	NA	NA	NA
2000	NA	0.27	0.11	NA	NA
<hr/>					
% Change, '90 to '00	NA	-47.88%	-43.82%	NA	NA
% Change, '98 to '00	NA	32.73%	70.63%	NA	NA

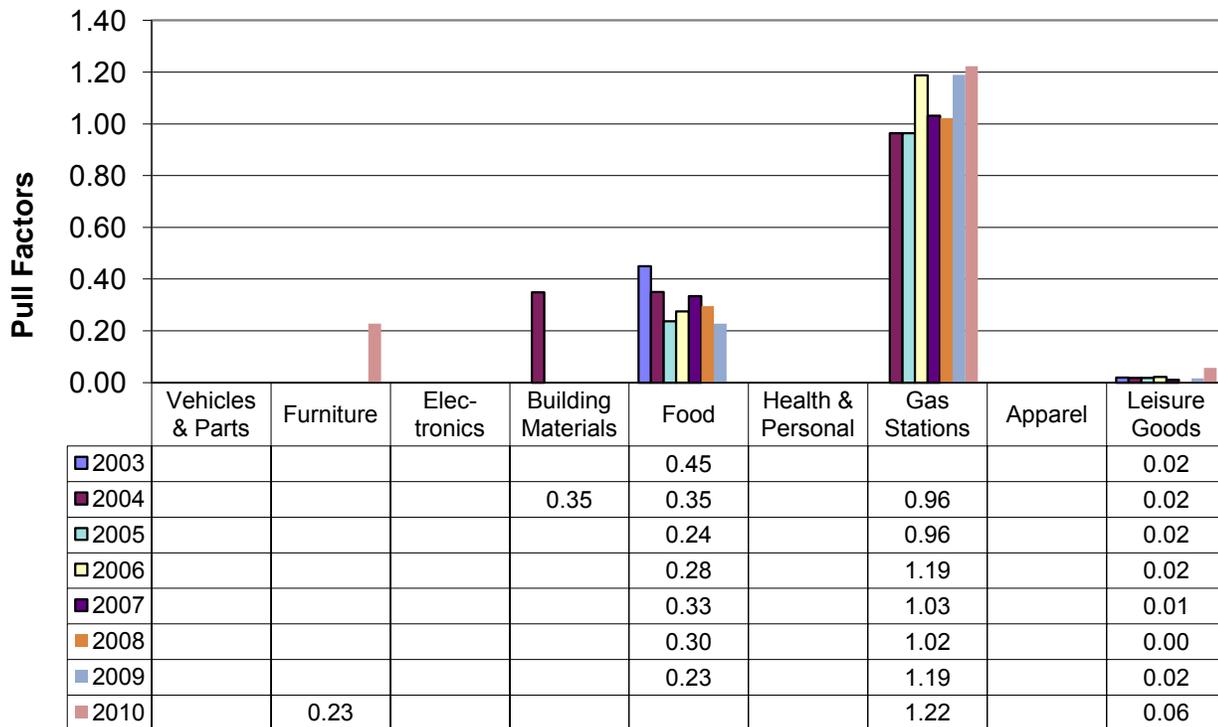
These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide,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

Recent Trends By Merchandise Category

North St. Paul

The following tables and charts depict pull factors in North St. Paul 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.

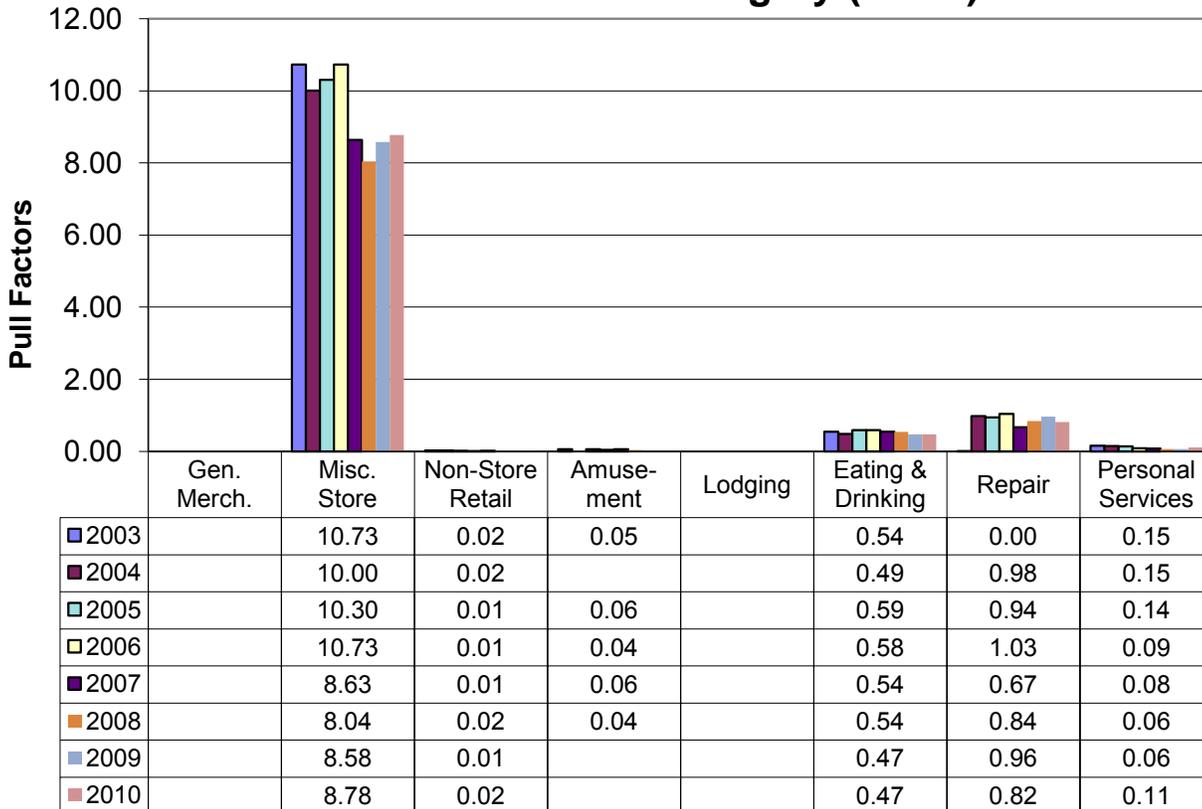
*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Recent Trends By Merchandise Category

North St. Paul

The following tables and charts depict pull factors in North St. Paul 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.

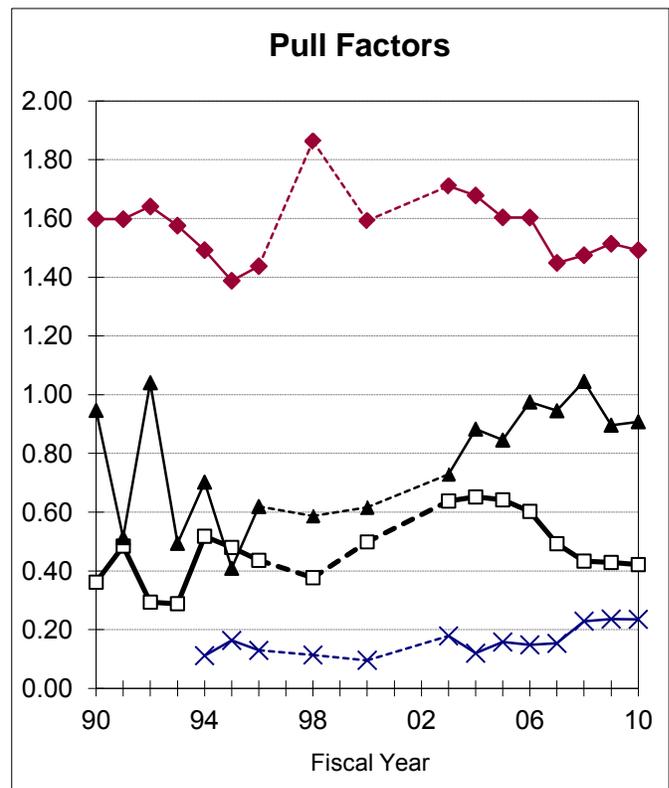
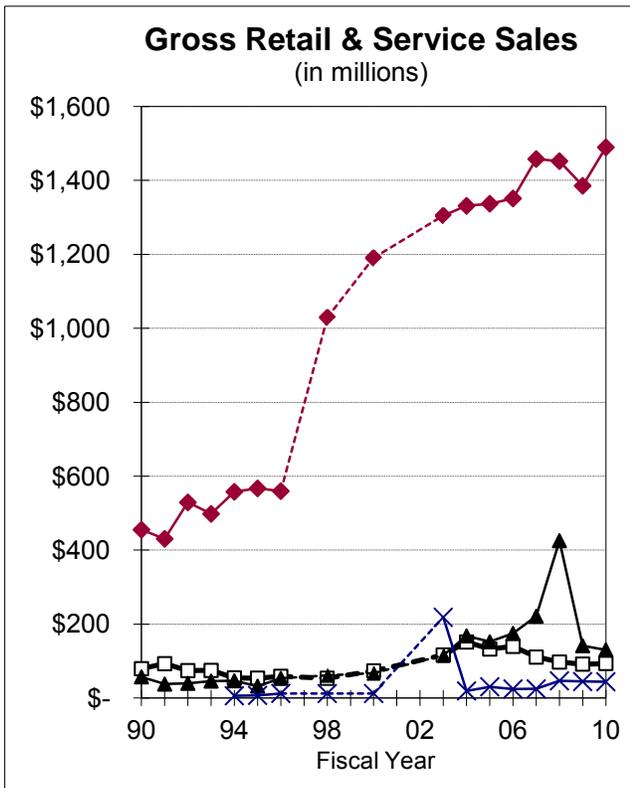
Eating & Drinking: Restaurants, donut shops, coffee house, cafeteria, caterers, taverns, and nightclubs,

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 North St. Paul



□ North St. Paul
× Mahtomedi

▲ Little Canada
◆ Maplewood

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)
North St. Paul	11,460	\$93.57	\$43.59	160	\$3,804	0.42
Little Canada	9,773	\$130.51	\$80.04	193	\$8,190	0.91
Mahtomedi	7,676	\$44.08	\$16.28	119	\$2,121	0.24
Maplewood	38,018	\$1,489.38	\$511.71	889	\$13,460	1.49

Trade Area Analysis of Retail Sales

North St. Paul

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	\$7.76	NA	NA	NA	NA	NA	NA
Furniture Stores	\$4.49	\$0.92	-\$3.57	-79.4%	-9,105	4	2.1%
Electronics	\$2.39	NA	NA	NA	NA	NA	NA
Building Materials	\$17.78	NA	NA	NA	NA	NA	NA
Food, Groceries	\$8.11	NA	NA	NA	NA	NA	NA
Health, Personal Stores	\$2.04	NA	NA	NA	NA	NA	NA
Gasoline Stations	\$3.07	\$2.45	-\$0.62	-20.2%	-2,314	5	5.6%
Apparel	\$1.08	NA	NA	NA	NA	NA	NA
Leisure Goods	\$1.71	\$0.16	-\$1.56	-90.9%	-10,420	7	0.4%
General Merchandise Stores	\$41.84	NA	NA	NA	NA	NA	NA
Miscellaneous Retail	\$15.13	\$29.84	+\$14.71	+97.2%	11,139	34	67.7%
Amusement & Recreation	\$2.05	NA	NA	NA	NA	NA	NA
Accommodations	\$5.25	NA	NA	NA	NA	NA	NA
Eating & Drinking Places	\$15.43	\$6.90	-\$8.53	-55.3%	-6,335	21	15.7%
Repair, Maintenance	\$2.94	\$1.95	-\$0.99	-33.6%	-3,849	17	4.4%
Personal Services, Laundry	\$0.70	\$0.18	-\$0.53	-74.8%	-8,576	13	0.4%
Total Taxable Retail & Service	\$95.93	\$44.07	-\$51.86	-54.1%	-6,195	160	100.0%

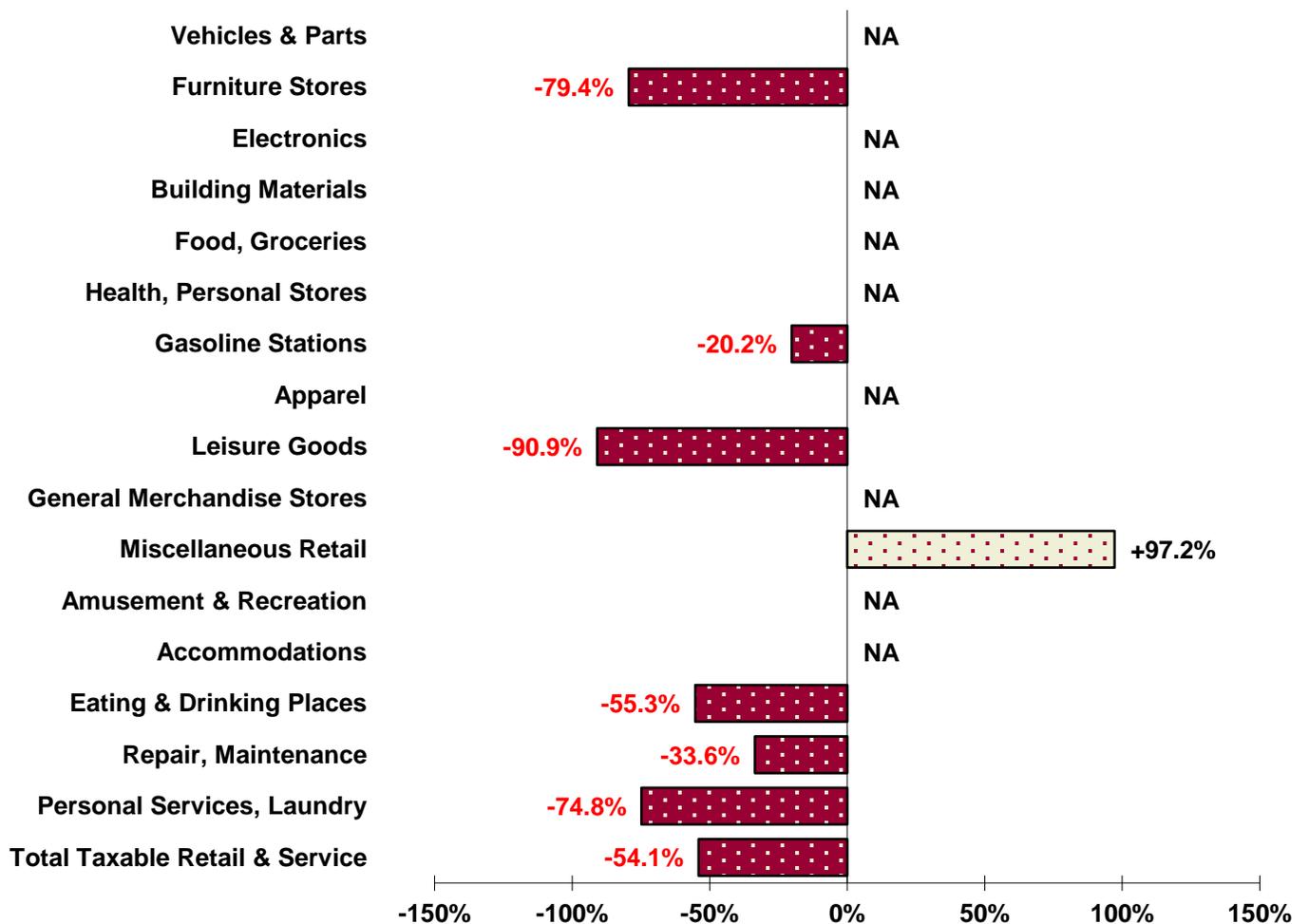
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of North St. Paul Retail Trade

The chart below depicts the percentage amount North St. Paul's actual sales were above or below expected sales in 2010 by merchandise group. Of the 7 merchandise categories with reported data, sales in 1 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 Miscellaneous Retail category, which has a 97.2 percent surplus. Overall, North St. Paul had a retail sales leakage of 54.1 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 9,100 & 13,800 (Range: Population of North St. Paul +/- ~ 20%.) (28 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																		
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
Mendota Heights	11,071		0.46	0.07		0.27	0.14	1.09	0.08	0.33		0.29	2.41	1.69	0.71	1.05	1.91	0.47
Alexandria	11,070	3.07	2.88	2.28	5.08	1.97	2.38	2.27	0.92	1.49	6.43	3.08	1.89	2.53	1.98	3.07	1.85	2.45
Grand Rapids	10,869	4.11	1.68	0.31	4.59	2.21	1.52	4.83	0.83	0.92	5.14	1.05	0.16	2.33	1.77	1.62	0.52	2.06
Unadjusted Average: *		2.13	0.88	0.56	1.38	1.12	1.27	1.28	0.46	0.54	2.75	4.61	0.68	1.17	0.97	1.14	0.39	0.81

* 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 9,100 & 13,800 (Range: Population of North St. Paul +/- ~ 20%.) (28 Cities)

Rankings

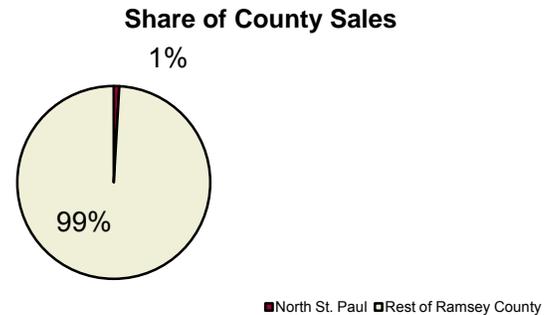
Town	Population	Vehicles, Parts	Furniture Stores	Elec- tronics	Building Materials	Food	Health, Personal	Gasoline Stations	Apparel	Leisure Goods	General Merch.	Misc.	Amuse- ment	Lodging	Eating & Drinking	Repair, Maint.	Personal Services	Taxable \$ Pull Factor
Town name																		
Marshall	# 1	#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

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.

North St. Paul & Ramsey 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 North St. Paul and Ramsey County in 2010. North St. Paul accounted for 2 percent of the county's firms and 1 percent of the county's sales.



Sales by Merchandise Category, North St. Paul & Ramsey County, 2010

Merchandise Category	North St. Paul		Ramsey County		City's Share of County Total	
	Taxable Sales (\$millions)	Number of Firms	Taxable Sales (\$millions)	Number of Firms	Sales	Firms
Vehicles & Parts	NA	NA	\$158.83	146	NA	NA
Furniture Stores	\$0.92	4	\$115.01	169	0.8%	2.4%
Electronics	NA	NA	\$307.72	126	NA	NA
Building Materials	NA	NA	\$270.95	94	NA	NA
Food, Groceries	NA	NA	\$329.82	388	NA	NA
Health, Personal Stores	NA	NA	\$75.02	177	NA	NA
Gasoline Stations	\$2.45	5	\$70.38	172	3.5%	2.9%
Apparel	NA	NA	\$122.60	376	NA	NA
Leisure Goods	\$0.16	7	\$139.96	334	0.1%	2.1%
General Merchandise	NA	NA	\$383.32	68	NA	NA
Miscellaneous Retail	\$29.84	41	\$163.28	1008	18.3%	4.1%
Non-Store Retailers	\$0.06	8	\$45.15	468	0.1%	1.7%
Amusement & Recreation	NA	NA	\$536.50	146	NA	NA
Accommodations	NA	NA	\$115.08	47	NA	NA
Eating & Drinking Places	\$6.90	21	\$777.37	1145	0.9%	1.8%
Repair, Maintenance	\$1.95	17	\$95.94	530	2.0%	3.2%
Personal Service, Laundry	\$0.18	13	\$114.03	671	0.2%	1.9%
Total Sales*	\$43.59	160	\$4,746.25	9,925	0.9%	1.6%

White Bear Lake Retail Trade Overview

Total Taxable and Gross Retail Sales

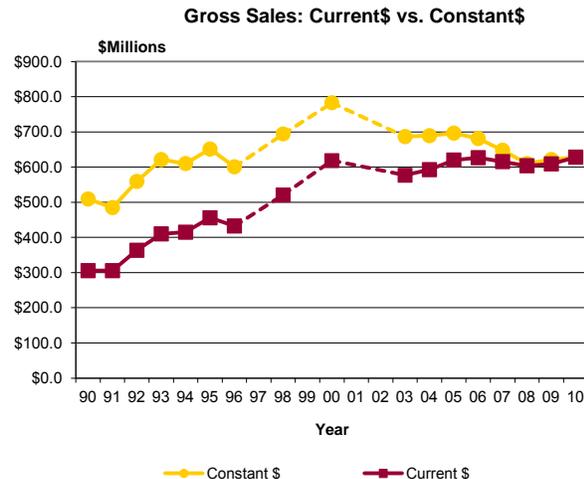
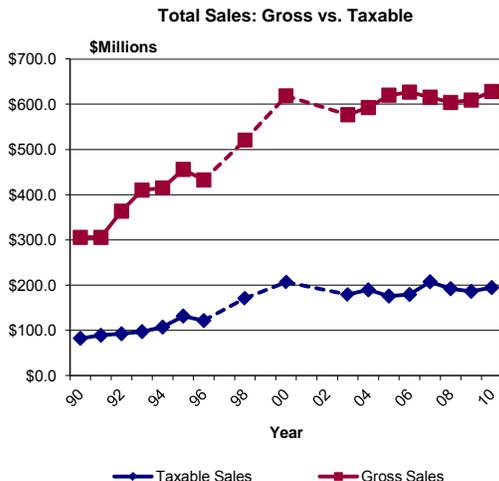
The table below presents gross and taxable retail and services sales for White Bear Lake from 1990 through 2010. Without inflation adjustments, taxable sales in White Bear Lake increased 8.5 percent from 2003 to 2010, while the number of firms rose 8.6 percent. Statewide, taxable sales increased 6.1 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

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 White Bear Lake totaled \$82.29 million, an amount worth \$137.14 million in 2010 dollars. In constant dollars, gross sales fell 8.5 percent between 2003 and 2010. Constant dollar taxable sales decreased 8.9 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	24,560	\$305.56	\$82.29	\$509.27	\$137.14	569	\$3,350	0.76
1991	24,887	\$305.52	\$89.09	\$484.96	\$141.41	616	\$3,580	0.82
1992	25,045	\$363.50	\$92.45	\$559.24	\$142.23	578	\$3,691	0.76
1993	25,142	\$410.10	\$97.12	\$621.36	\$147.15	580	\$3,863	0.77
1994	25,524	\$414.84	\$107.19	\$610.05	\$157.63	604	\$4,200	0.77
1995	25,696	\$455.87	\$131.58	\$651.25	\$187.97	592	\$5,121	0.90
1996	25,729	\$432.60	\$121.48	\$600.83	\$168.73	682	\$4,722	0.71
1997	25,977	NA	NA	NA	NA	NA	\$0	NA
1998	26,208	\$520.67	\$171.04	\$694.23	\$228.05	666	\$6,526	0.94
1999	26,362	NA	NA	NA	NA	NA	\$0	NA
2000	24,325	\$618.52	\$206.49	\$782.93	\$261.39	615	\$8,489	1.12
2001	24,463	NA	NA	NA	NA	NA	\$0	NA
2002	24,445	NA	NA	NA	NA	NA	\$0	NA
2003	24,388	\$576.78	\$179.39	\$686.65	\$213.56	500	\$7,356	0.82
2004	24,051	\$592.74	\$189.51	\$689.23	\$220.36	513	\$7,880	0.85
2005	23,725	\$620.00	\$175.83	\$696.63	\$197.56	540	\$7,411	0.78
2006	23,586	\$626.74	\$179.29	\$681.24	\$194.88	526	\$7,601	0.79
2007	24,127	\$615.58	\$207.47	\$647.98	\$218.39	546	\$8,599	0.88
2008	24,213	\$603.88	\$192.05	\$609.98	\$193.99	535	\$7,932	0.83
2009	24,360	\$609.14	\$186.21	\$621.57	\$190.01	545	\$7,644	0.85
2010	23,797	\$628.22	\$194.56	\$628.22	\$194.56	543	\$8,176	0.91
7 yr Change '03 to '10								
	-2.4%	8.9%	8.5%	-8.5%	-8.9%	8.6%	11.1%	9.9%
3 yr Change '07 to '10								
	-1.4%	2.1%	-6.2%	-3.0%	-10.9%	-0.5%	-4.9%	2.5%

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

White Bear Lake: Total Retail Sales

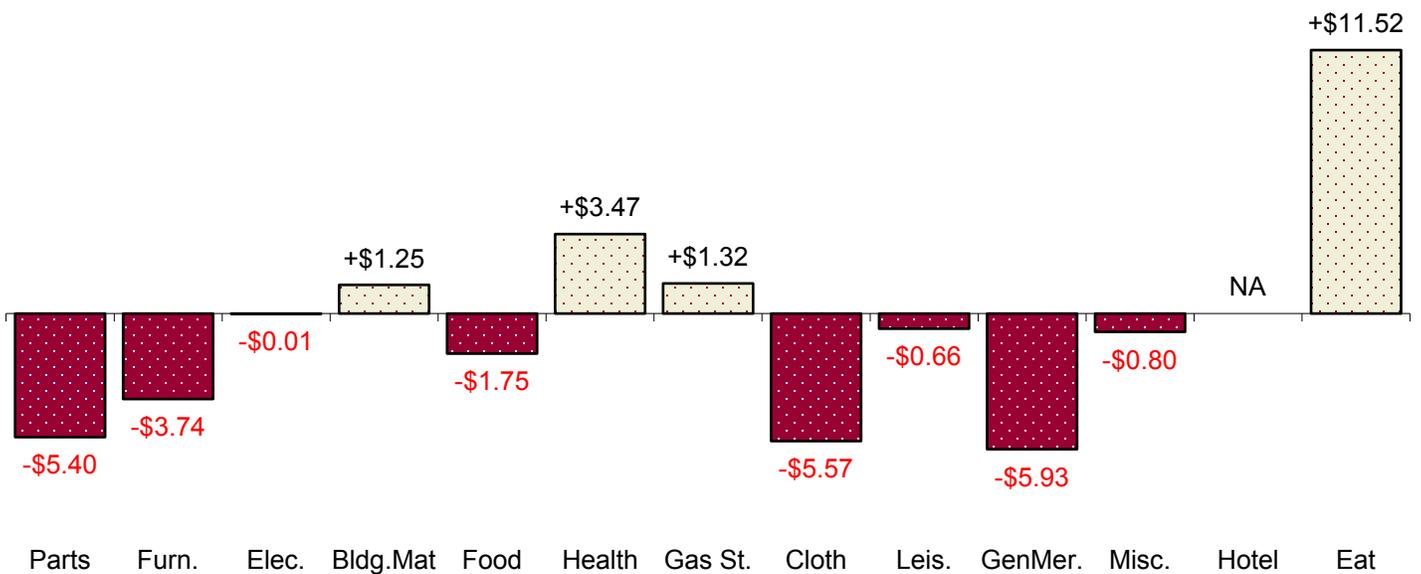


White Bear Lake Components of Change, 2007 to 2010

Category	Taxable Sales 2007	Taxable Sales 2010	Dollar Change	Percent Change
Vehicles & Parts	\$15,610,839	\$10,210,034	-\$5,400,805	-34.60%
Furniture Stores	\$12,332,687	\$8,597,011	-\$3,735,676	-30.29%
Electronics	\$1,201,127	\$1,190,491	-\$10,636	-0.89%
Building Materials	\$3,216,343	\$4,470,512	+\$1,254,169	+38.99%
Food, Groceries	\$15,151,575	\$13,401,002	-\$1,750,573	-11.55%
Health, Personal Stores	\$5,529,532	\$9,003,884	+\$3,474,352	+62.83%
Gasoline Stations	\$6,608,161	\$7,924,974	+\$1,316,813	+19.93%
Apparel	\$8,408,495	\$2,833,999	-\$5,574,496	-66.30%
Leisure Goods	\$4,565,871	\$3,904,595	-\$661,276	-14.48%
General Merchandise Stores	\$43,295,632	\$37,364,293	-\$5,931,339	-13.70%
Miscellaneous Retail	\$3,885,854	\$3,086,147	-\$799,707	-20.58%
Accommodations	NA	NA	NA	NA
Eating & Drinking	+\$46,088,320	+\$57,605,249	+\$11,516,929	+24.99%
Total Retail and Services Sales	\$207,470,498	\$194,558,638	-\$12,911,860	-6.22%

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 to 2010



Historical Trends By Merchandise Category

White Bear Lake

The following tables and charts depict pull factors in White Bear Lake 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.

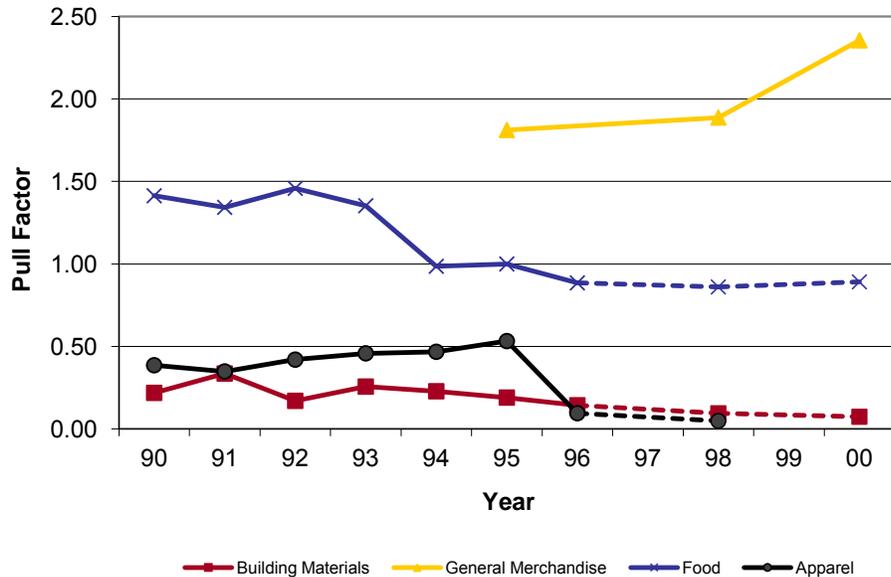
General Merchandise: Includes retail stores which sell a number of lines of merchandise, such as dry goods, apparel and accessories, furniture and home furnishings, small wares, hardware, and food. The stores included in this group are known as department stores, variety stores, general merchandise stores, 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
White Bear Lake, 1990-2000

Year	Building Materials	General Merchandise	Food	Apparel
1990	0.22	NA	1.41	0.39
1991	0.34	NA	1.34	0.35
1992	0.17	NA	1.46	0.42
1993	0.26	NA	1.35	0.46
1994	0.23	NA	0.99	0.47
1995	0.19	1.81	1.00	0.53
1996	0.14	NA	0.88	0.09
1997	NA	NA	NA	NA
1998	0.10	1.89	0.86	0.05
1999	NA	NA	NA	NA
2000	0.07	2.36	0.89	NA

% Change, '90 to '00: Building Materials -65.99%, General Merchandise NA, Food -36.87%, Apparel NA

% Change, '98 to '00: Building Materials -22.24%, General Merchandise 24.80%, Food 3.64%, Apparel NA

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 White Bear Lake

The following tables and charts depict pull factors in White Bear Lake 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.

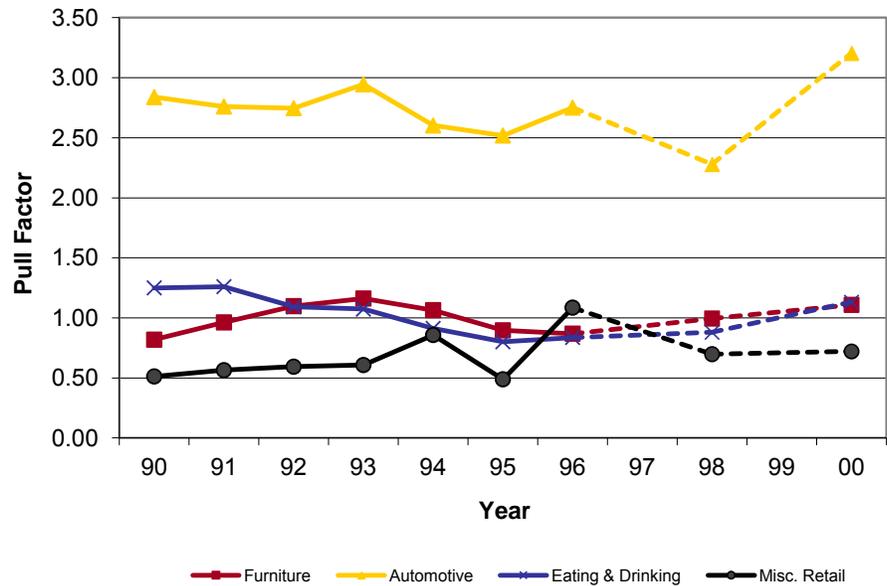
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

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 White Bear Lake, 1990-2000

Year	Furniture	Automotive	Eating & Drinking	Misc. Retail
1990	0.82	2.84	1.25	0.51
1991	0.96	2.76	1.26	0.56
1992	1.10	2.75	1.09	0.59
1993	1.16	2.95	1.07	0.61
1994	1.06	2.60	0.91	0.86
1995	0.90	2.52	0.80	0.49
1996	0.87	2.75	0.84	1.09
1997	NA	NA	NA	NA
1998	0.99	2.28	0.88	0.70
1999	NA	NA	NA	NA
2000	1.11	3.21	1.13	0.72

% Change, '90 to '00 35.34% 12.92% -9.51% 40.65%

% Change, '98 to '00 11.45% 40.54% 28.58% 3.41%

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 White Bear Lake

The following tables and charts depict pull factors in White Bear Lake 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.

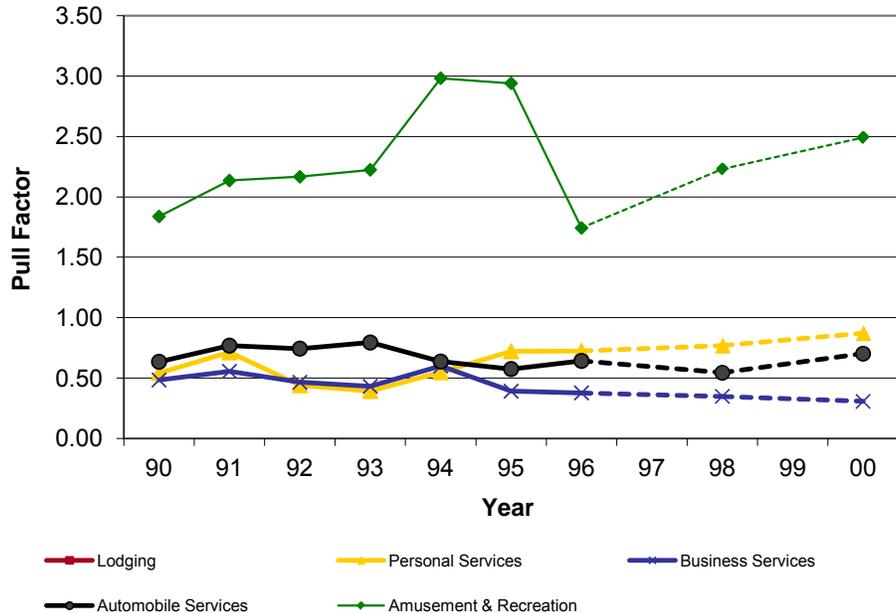
Personal Services: includes establishments primarily engaged in providing services generally to individuals, such as barber and beauty shops, drycleaning plants, laundries, and photographic studios.

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 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 (3 of 3)



Pull Factors by Merchandise Category White Bear Lake, 1990-2000

Year	Lodging	Personal Services	Business Services	Automobile Services	Amusement & Recreation
1990	NA	0.54	0.48	0.64	1.84
1991	NA	0.71	0.56	0.77	2.14
1992	NA	0.44	0.47	0.74	2.17
1993	NA	0.39	0.43	0.79	2.22
1994	NA	0.55	0.60	0.64	2.98
1995	NA	0.72	0.39	0.58	2.94
1996	NA	0.73	0.38	0.64	1.74
1997	NA	NA	NA	NA	NA
1998	NA	0.77	0.35	0.54	2.23
1999	NA	NA	NA	NA	NA
2000	NA	0.87	0.31	0.70	2.49
<hr/>					
% Change, '90 to '00	NA	60.44%	-36.42%	10.63%	35.53%
% Change, '98 to '00	NA	13.12%	-11.83%	29.07%	11.62%

*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.

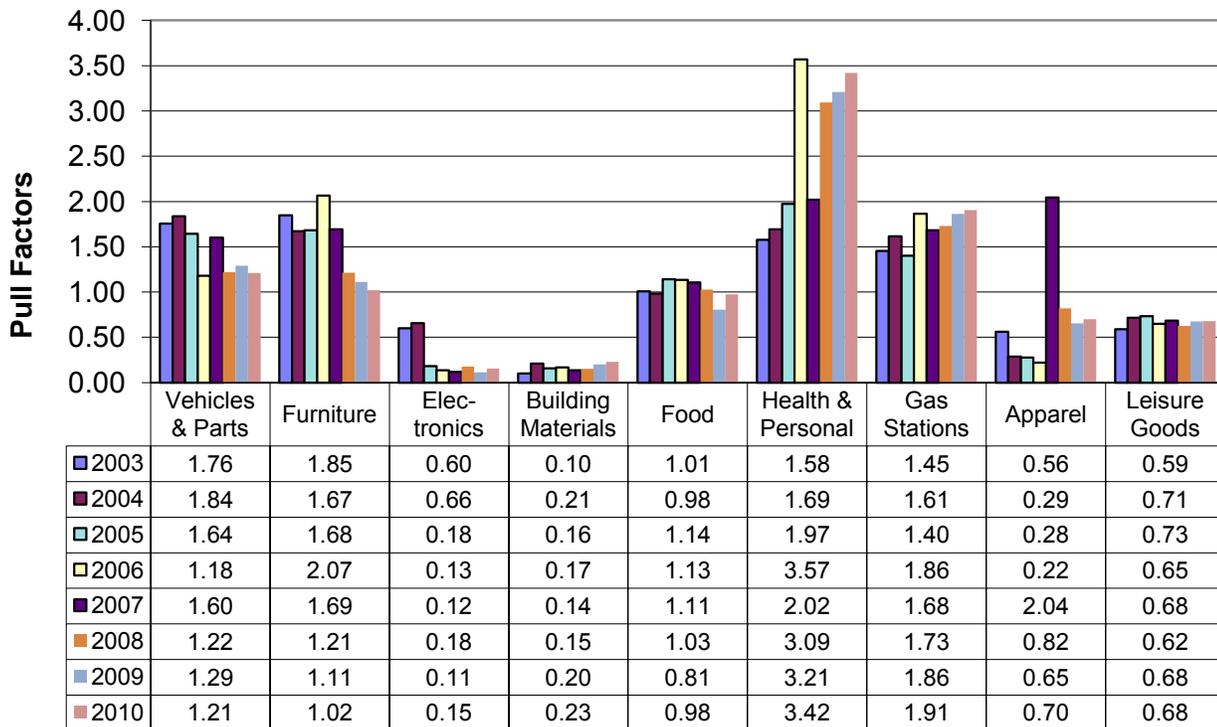
These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide,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

Recent Trends By Merchandise Category

White Bear Lake

The following tables and charts depict pull factors in White Bear Lake 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.

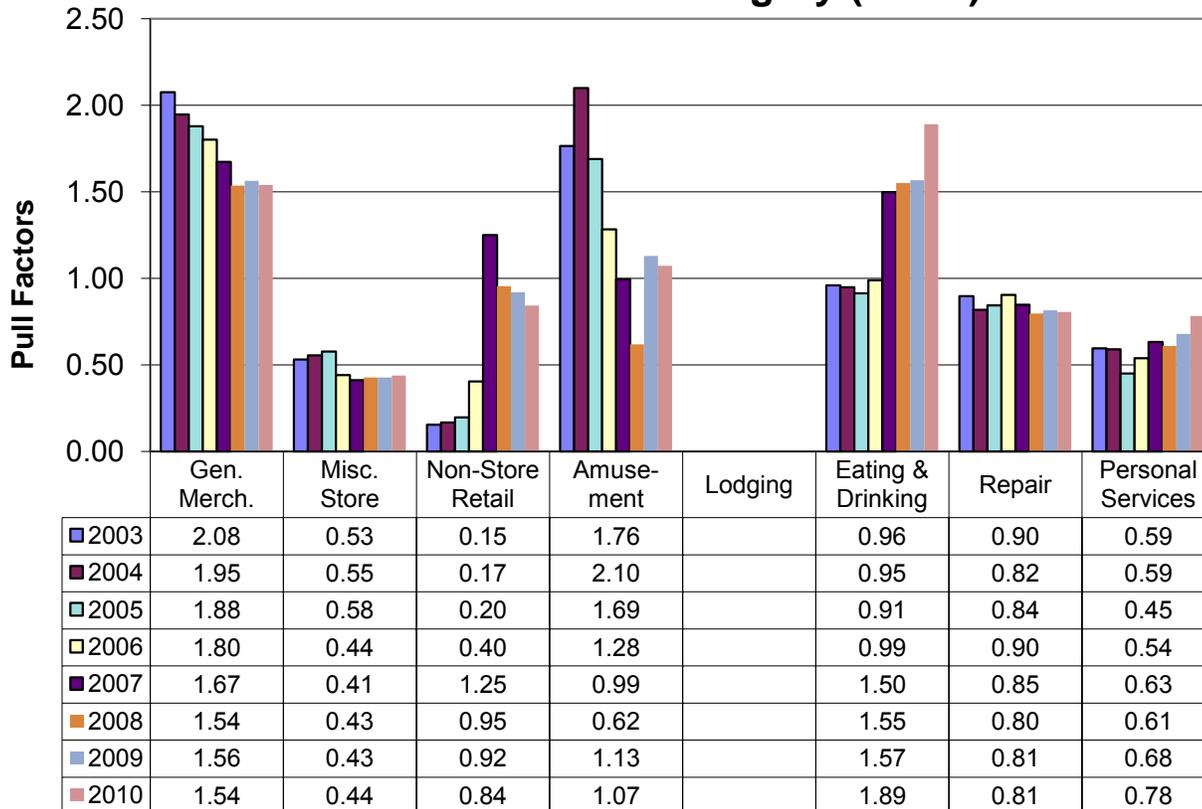
*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Recent Trends By Merchandise Category

White Bear Lake

The following tables and charts depict pull factors in White Bear Lake 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,

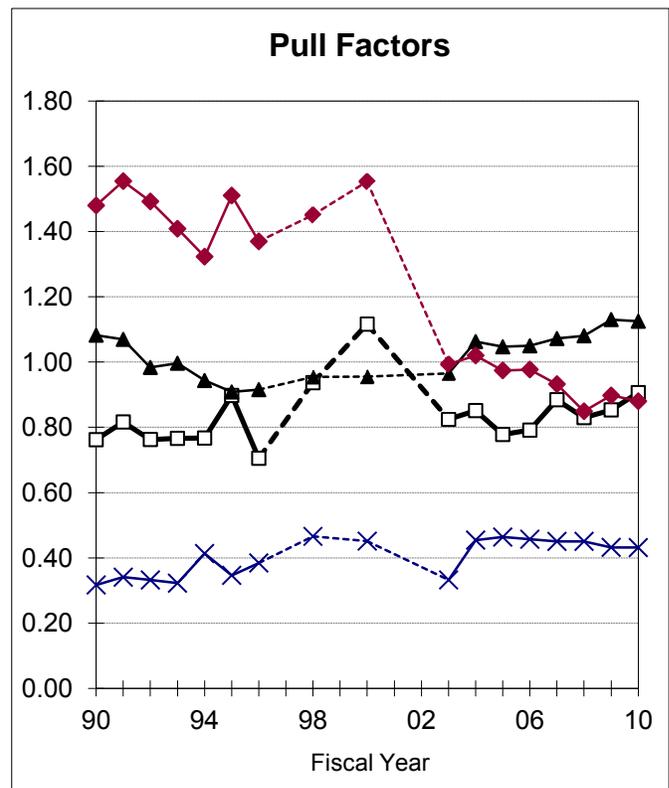
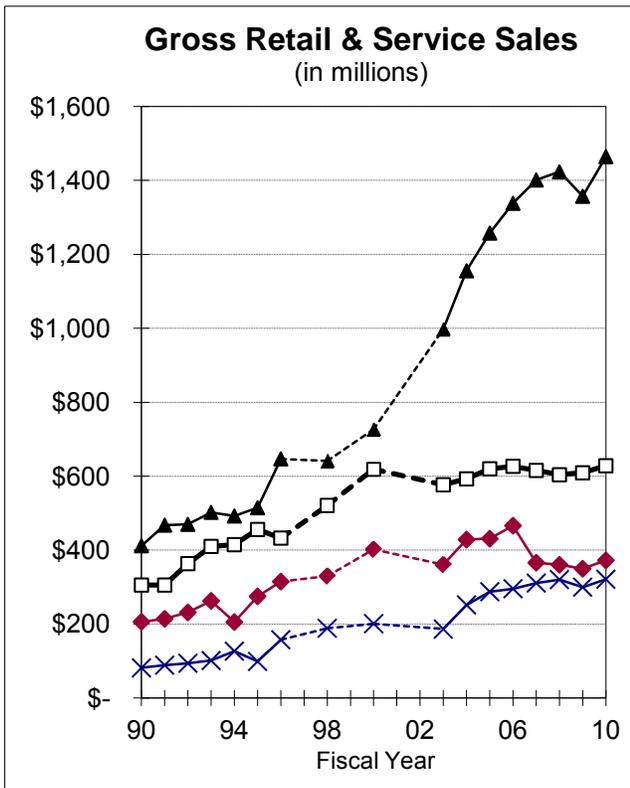
Repair: Businesses that return items to working order. Examples: cars, lawnmowers, small engines, knives, shoes, computers, furniture, and appliances.

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

White Bear Lake



White Bear Lake
 Cottage Grove
 Blaine
 Stillwater

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)
White Bear Lake	23,797	\$628.22	\$194.56	543	\$8,176	0.91
Blaine	57,186	\$1,464.29	\$580.38	1,078	\$10,149	1.13
Cottage Grove	34,589	\$321.37	\$134.66	355	\$3,893	0.43
Stillwater	18,225	\$372.43	\$144.69	506	\$7,939	0.88

Trade Area Analysis of Retail Sales

White Bear Lake

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	\$9.12	\$10.21	+\$1.09	+11.9%	2,837	8	5.5%
Furniture Stores	\$3.89	\$8.60	+\$4.71	+121.3%	28,859	7	4.6%
Electronics	\$4.14	\$1.19	-\$2.95	-71.3%	-16,957	5	0.6%
Building Materials	\$25.00	\$4.47	-\$20.53	-82.1%	-19,541	5	2.4%
Food, Groceries	\$14.24	\$13.40	-\$0.84	-5.9%	-1,400	16	7.2%
Health, Personal Stores	\$2.81	\$9.00	+\$6.19	+220.1%	52,375	11	4.8%
Gasoline Stations	\$4.75	\$7.92	+\$3.18	+66.9%	15,923	14	4.3%
Apparel	\$1.31	\$2.83	+\$1.52	+116.3%	27,681	16	1.5%
Leisure Goods	\$2.13	\$3.90	+\$1.77	+83.3%	19,824	19	2.1%
General Merchandise Stores	\$55.24	\$37.36	-\$17.87	-32.4%	-7,700	7	20.1%
Miscellaneous Retail	\$12.79	\$3.09	-\$9.70	-75.9%	-18,054	55	1.7%
Amusement & Recreation	\$3.96	\$6.98	+\$3.03	+76.5%	18,198	12	3.8%
Accommodations	\$6.47	NA	NA	NA	NA	NA	NA
Eating & Drinking Places	\$28.82	\$57.61	+\$28.78	+99.9%	23,766	62	30.9%
Repair, Maintenance	\$4.87	\$4.00	-\$0.87	-17.8%	-4,243	32	2.1%
Personal Services, Laundry	\$2.08	\$2.67	+\$0.59	+28.5%	6,790	49	1.4%
Total Taxable Retail & Service	\$158.61	\$186.21	+\$27.60	+17.4%	4,141	543	100.0%

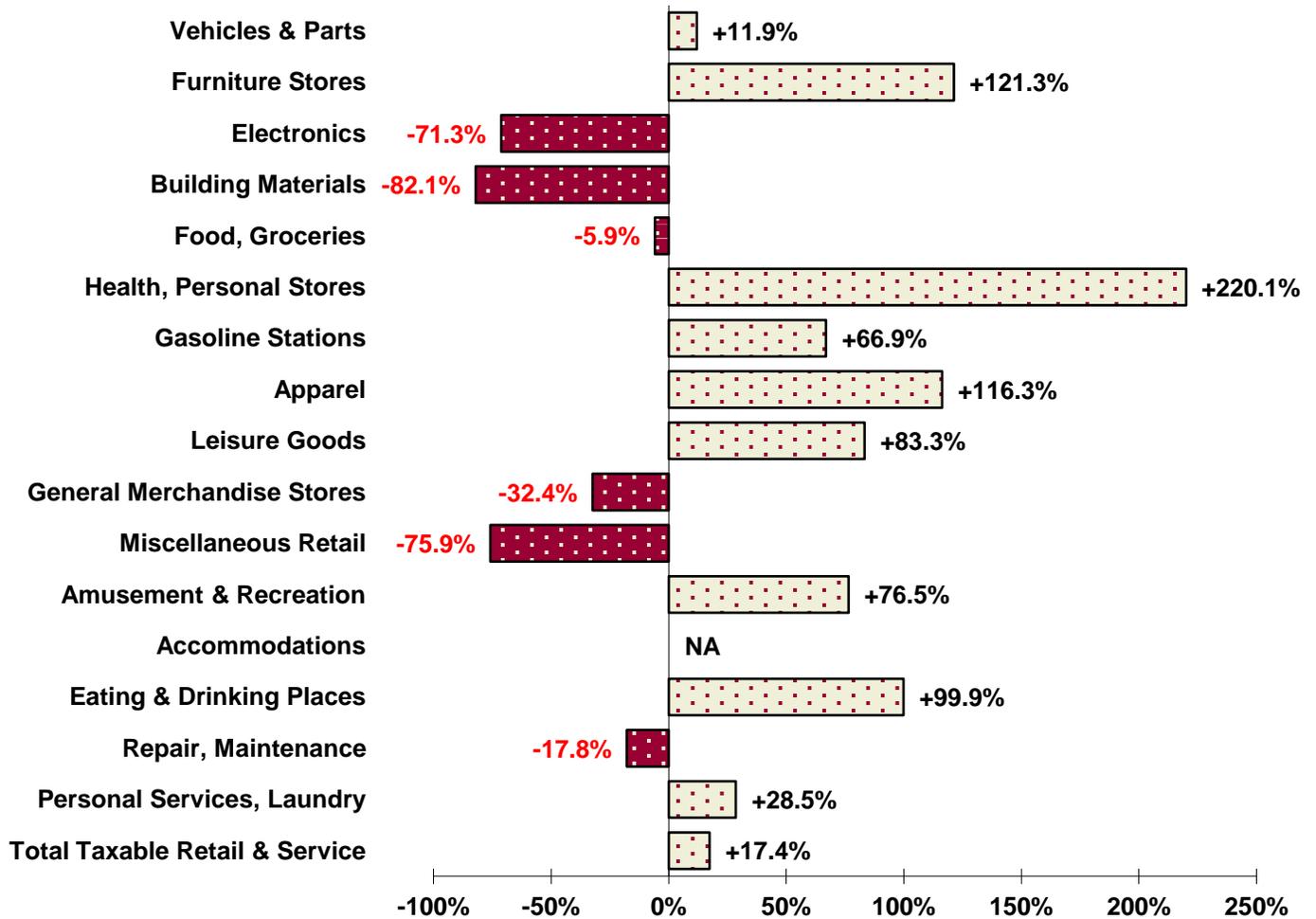
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of White Bear Lake Retail Trade

The chart below depicts the percentage amount White Bear Lake's actual sales were above or below expected sales in 2010 by merchandise group. Of the 15 merchandise categories with reported data, sales in 9 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 Health, Personal Stores category, which has a 220.1 percent surplus. Overall, White Bear Lake had a retail sales surplus of 17.4 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 19,400 & 29,300 (Range: Population of White Bear Lake +/- ~ 20%.) (28 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																		
Winona	27,592	1.02	0.40	0.56	1.58	1.03	0.78	1.81	0.15	0.42	2.66	0.44	0.26	0.95	1.55	0.96	0.34	1.03
Oakdale	27,378	0.84	1.12	4.94	2.43	0.75	0.84	0.69	0.09	1.15	2.00	0.19	1.72	0.79	0.83	0.48	0.29	1.09
Fridley	27,208	2.00	2.18		2.70	0.66	0.88	1.15	0.02	0.15	2.81	1.63			1.02	1.62	4.92	1.24
Savage	26,911	0.61	0.37	0.08	0.25	1.15	0.20	1.11	0.03	0.50		4.21	0.86		1.07	0.94	0.74	0.58
Owatonna	25,599	1.32	0.38	0.10	1.12	1.36	0.88	1.21	0.91	5.92	2.28	0.71	0.65	0.98	1.10	1.00	0.60	1.05
Shoreview	25,043		0.07	1.17		0.61	0.05	0.93	0.07	0.04		4.76			0.46	1.11	0.23	0.53
Austin	24,718	0.79	0.27	0.24	0.36	1.29	1.18	0.75	0.20	0.20	1.34	0.67	0.37	0.81	0.86	0.72	0.49	0.60
White Bear Lake	23,797	1.21	1.63	0.15	0.23	0.98	3.42	1.91	0.70	0.68	1.54	0.44	1.07		1.89	0.81	0.78	0.91
Chaska	23,770	0.68			1.33	1.00	1.00	0.88	0.89	0.04		0.67	0.46	1.13	0.63	0.47	0.58	0.53
Ramsey	23,668	0.79	2.23			0.72	0.02	1.13	0.00	0.24		0.42	0.22		0.34	0.30	0.58	0.32
Faribault	23,352	0.95	0.39	0.22	0.42	1.27	0.92	0.79	0.53	0.15	1.45	0.26	0.39	0.46	0.88	0.40	0.35	0.70
Champlin	23,089	0.27	0.00	0.07	0.05	0.85	0.92	1.03	0.06	0.07		4.67	0.56		0.88	0.29	0.50	0.44
Elk River	22,974	1.69	0.63	0.16	2.82	1.24	1.22	1.17	0.34	0.56	2.09	1.74	0.42	0.14	0.97	1.45	0.66	1.04
Chanhassen	22,952	0.44	0.33	0.16	2.17	1.75	1.23	0.94	0.03	0.20		8.52	1.87	0.79	1.23	1.59	1.31	1.08
Prior Lake	22,796	0.57	0.03	0.01	0.14	0.94	1.64	0.82	0.15	0.02		0.61	0.74	2.18	0.57	0.44	0.50	0.40
Hastings	22,172	0.63	0.10	0.18	0.80	0.95	1.37	1.13	0.36	0.01	1.97	0.37	0.33	0.27	0.91	0.73	0.37	0.65
Crystal	22,151	0.81	0.78	0.14		1.33	1.08	0.74	0.58	1.15		5.15	0.07		0.90	0.65	0.61	0.56
Rosemount	21,874	0.64		0.02	0.15	0.99	0.85	0.61	0.01	0.09		0.83	0.26		0.68	0.55	0.30	0.32
New Brighton	21,456	0.34	0.49			0.58	0.12	0.98	0.13	0.05		1.04	0.46		0.62	0.74	0.27	0.27
Farmington	21,086				1.63	0.54		0.96	0.19	0.01			0.32	0.25	0.33	0.43	0.64	0.32
Unadjusted Average: *		0.90	0.68	0.55	1.10	1.05	1.03	1.04	0.28	0.64	2.02	2.02	0.64	0.85	0.93	0.81	0.79	0.73

* 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 19,400 & 29,300 (Range: Population of White Bear Lake +/- ~ 20%.) (28 Cities)

Rankings

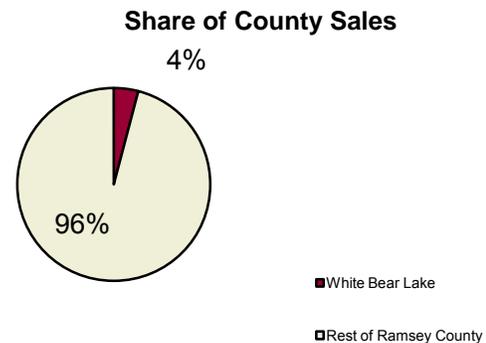
Town	Population	Vehicles, Parts	Furniture Stores	Elec- tronics	Building Materials	Food	Health, Personal	Gasoline Stations	Apparel	Leisure Goods	General Merch.	Misc.	Amuse- ment	Lodging	Eating & Drinking	Repair, Maint.	Personal Services	Taxable \$ Pull Factor
Town name																		
Winona	# 1	# 5	# 8	# 3	# 6	# 8	# 15	# 2	# 11	# 7	# 2	# 14	# 15	# 4	# 2	# 6	# 16	# 6
Oakdale	# 2	# 7	# 4	# 1	# 3	# 15	# 14	# 19	# 13	# 2	# 5	# 20	# 2	# 7	# 13	# 14	# 18	# 2
Fridley	# 3	# 1	# 2		# 2	# 17	# 12	# 5	# 18	# 12	# 1	# 7			# 6	# 1	# 1	# 1
Savage	# 4	# 14	# 11	# 12	# 12	# 7	# 16	# 8	# 16	# 6		# 5	# 4		# 5	# 7	# 4	# 11
Owatonna	# 5	# 3	# 10	# 11	# 8	# 2	# 11	# 3	# 1	# 1	# 3	# 10	# 6	# 3	# 4	# 5	# 8	# 4
Shoreview	# 6		# 15	# 2		# 18	# 18	# 13	# 14	# 17		# 3			# 18	# 4	# 20	# 13
Austin	# 7	# 10	# 13	# 4	# 11	# 4	# 6	# 17	# 8	# 10	# 9	# 11	# 12	# 5	# 12	# 11	# 13	# 10
White Bear Lake	# 8	# 4	# 3	# 9	# 13	# 11	# 1	# 1	# 3	# 4	# 7	# 15	# 3		# 1	# 8	# 3	# 7
Chaska	# 9	# 11			# 7	# 9	# 8	# 14	# 2	# 16		# 12	# 8	# 2	# 15	# 15	# 10	# 14
Ramsey	# 10	# 9	# 1			# 16	# 19	# 6	# 20	# 8		# 16	# 17		# 19	# 19	# 9	# 17
Faribault	# 11	# 6	# 9	# 5	# 10	# 5	# 10	# 16	# 5	# 11	# 8	# 19	# 11	# 8	# 10	# 18	# 15	# 8
Champlin	# 12	# 18	# 17	# 13	# 16	# 14	# 9	# 9	# 15	# 14		# 4	# 7		# 11	# 20	# 12	# 15
Elk River	# 13	# 2	# 6	# 8	# 1	# 6	# 5	# 4	# 7	# 5	# 4	# 6	# 10	# 10	# 7	# 3	# 5	# 5
Chanhassen	# 14	# 16	# 12	# 7	# 4	# 1	# 4	# 12	# 17	# 9		# 1	# 1	# 6	# 3	# 2	# 2	# 3
Prior Lake	# 15	# 15	# 16	# 15	# 15	# 13	# 2	# 15	# 10	# 18		# 13	# 5	# 1	# 17	# 16	# 11	# 16
Hastings	# 16	# 13	# 14	# 6	# 9	# 12	# 3	# 7	# 6	# 19	# 6	# 17	# 13	# 9	# 8	# 10	# 14	# 9
Crystal	# 17	# 8	# 5	# 10		# 3	# 7	# 18	# 4	# 3		# 2	# 18		# 9	# 12	# 7	# 12
Rosemount	# 18	# 12		# 14	# 14	# 10	# 13	# 20	# 19	# 13		# 9	# 14		# 14	# 13	# 17	# 19
New Brighton	# 19	# 17	# 7			# 19	# 17	# 10	# 12	# 15		# 8	# 9		# 16	# 9	# 19	# 20
Farmington	# 20				# 5	# 20		# 11	# 9	# 20		# 18	# 16		# 20	# 17	# 6	# 18

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.

White Bear Lake & Ramsey 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 White Bear Lake and Ramsey County in 2010. White Bear Lake accounted for 5 percent of the county's firms and 4 percent of the county's sales.



Sales by Merchandise Category, White Bear Lake & Ramsey County, 2010

Merchandise Category	White Bear Lake		Ramsey County		City's Share of County Total	
	Taxable Sales (\$millions)	Number of Firms	Taxable Sales (\$millions)	Number of Firms	Sales	Firms
Vehicles & Parts	\$10.21	8	\$158.83	146	6.4%	5.5%
Furniture Stores	\$8.60	7	\$115.01	169	7.5%	4.1%
Electronics	\$1.19	5	\$307.72	126	0.4%	4.0%
Building Materials	\$4.47	5	\$270.95	94	1.6%	5.3%
Food, Groceries	\$13.40	16	\$329.82	388	4.1%	4.1%
Health, Personal Stores	\$9.00	11	\$75.02	177	12.0%	6.2%
Gasoline Stations	\$7.92	14	\$70.38	172	11.3%	8.1%
Apparel	\$2.83	16	\$122.60	376	2.3%	4.3%
Leisure Goods	\$3.90	19	\$139.96	334	2.8%	5.7%
General Merchandise	\$37.36	7	\$383.32	68	9.7%	10.3%
Miscellaneous Retail	\$3.09	60	\$163.28	1008	1.9%	6.0%
Non-Store Retailers	\$5.42	33	\$45.15	468	12.0%	7.1%
Amusement & Recreation	\$6.98	12	\$536.50	146	1.3%	8.2%
Accommodations	NA	NA	\$115.08	47	NA	NA
Eating & Drinking Places	\$57.61	62	\$777.37	1145	7.4%	5.4%
Repair, Maintenance	\$4.00	32	\$95.94	530	4.2%	6.0%
Personal Service, Laundry	\$2.67	49	\$114.03	671	2.3%	7.3%
Total Sales*	\$194.56	543	\$4,746.25	9,925	4.1%	5.5%

Lake Elmo Retail Trade Overview

Total Taxable and Gross Retail Sales

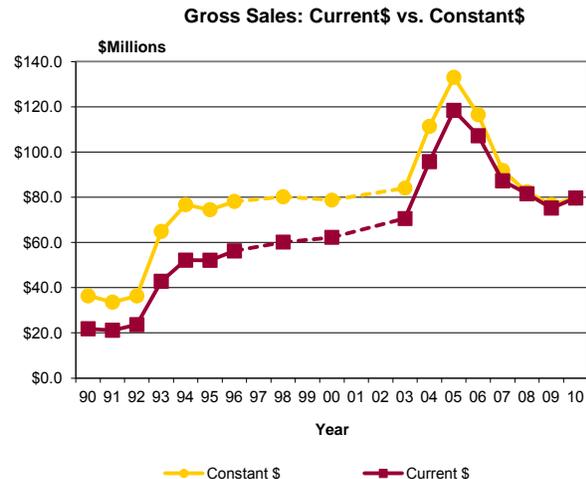
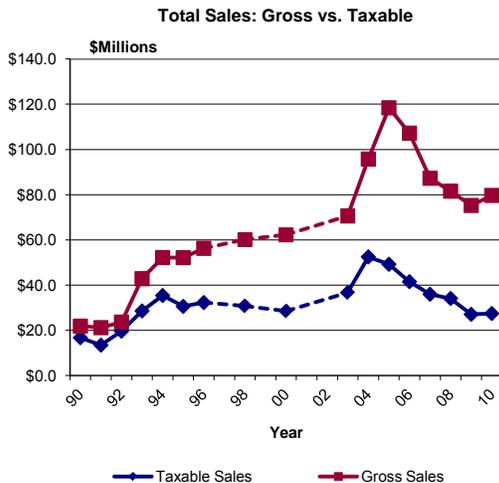
The table below presents gross and taxable retail and services sales for Lake Elmo from 1990 through 2010. Without inflation adjustments, taxable sales in Lake Elmo declined 25.3 percent from 2003 to 2010, while the number of firms rose 20.7 percent. Statewide, taxable sales increased 6.1 percent over 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 Lake Elmo totaled \$16.73 million, an amount worth \$27.88 million in 2010 dollars. In constant dollars, gross sales fell 5.2 percent between 2003 and 2010. Constant dollar taxable sales decreased 37.3 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	5,846	\$21.83	\$16.73	\$36.39	\$27.88	116	\$2,862	0.65
1991	5,937	\$21.17	\$13.45	\$33.61	\$21.35	116	\$2,266	0.52
1992	6,066	\$23.64	\$19.60	\$36.36	\$30.15	111	\$3,231	0.67
1993	6,205	\$42.83	\$28.57	\$64.89	\$43.29	122	\$4,605	0.91
1994	6,304	\$52.17	\$35.40	\$76.72	\$52.06	119	\$5,615	1.03
1995	6,354	\$52.14	\$30.57	\$74.49	\$43.67	110	\$4,811	0.84
1996	6,416	\$56.26	\$32.27	\$78.14	\$44.82	113	\$5,030	0.75
1997	6,493	NA	NA	NA	NA	NA	\$0	NA
1998	6,620	\$60.15	\$30.76	\$80.21	\$41.02	119	\$4,647	0.67
1999	6,849	NA	NA	NA	NA	NA	\$0	NA
2000	6,863	\$62.25	\$28.57	\$78.79	\$36.16	122	\$4,163	0.55
2001	7,169	NA	NA	NA	NA	NA	\$0	NA
2002	7,501	NA	NA	NA	NA	NA	\$0	NA
2003	7,714	\$70.59	\$36.74	\$84.04	\$43.74	135	\$4,763	0.53
2004	7,692	\$95.75	\$52.48	\$111.33	\$61.02	154	\$6,823	0.74
2005	7,607	\$118.41	\$49.22	\$133.05	\$55.30	172	\$6,470	0.68
2006	7,590	\$107.20	\$41.51	\$116.52	\$45.12	160	\$5,469	0.57
2007	7,516	\$87.26	\$35.94	\$91.85	\$37.84	156	\$4,782	0.49
2008	7,579	\$81.56	\$34.07	\$82.38	\$34.41	154	\$4,495	0.47
2009	7,646	\$75.22	\$27.07	\$76.75	\$27.63	170	\$3,541	0.40
2010	8,069	\$79.66	\$27.43	\$79.66	\$27.43	163	\$3,399	0.38
7 yr Change '03 to '10	4.6%	12.8%	-25.3%	-5.2%	-37.3%	20.7%	-28.6%	-29.4%
3 yr Change '07 to '10	7.4%	-8.7%	-23.7%	-13.3%	-27.5%	4.5%	-28.9%	-23.4%

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

Lake Elmo: Total Retail Sales



Lake Elmo Components of Change, 2007 to 2010

Category	Taxable Sales 2007	Taxable Sales 2010	Dollar Change	Percent Change
Vehicles & Parts	NA	NA	NA	NA
Furniture Stores	\$530,046	\$108,073	-\$421,973	-79.61%
Electronics	NA	\$111,278	NA	NA
Building Materials	\$11,626,294	\$6,472,338	-\$5,153,956	-44.33%
Food, Groceries	NA	NA	NA	NA
Health, Personal Stores	NA	NA	NA	NA
Gasoline Stations	NA	NA	NA	NA
Apparel	\$329,769	\$398,551	+\$68,782	+20.86%
Leisure Goods	\$760,623	\$1,158,445	+\$397,822	+52.30%
General Merchandise Stores	NA	NA	NA	NA
Miscellaneous Retail	\$4,715,700	\$3,502,703	-\$1,212,997	-25.72%
Accommodations	NA	NA	NA	NA
Eating & Drinking	+\$8,903,855	+\$7,347,759	-\$1,556,096	-17.48%
Total Retail and Services Sales	\$35,944,449	\$27,430,281	-\$8,514,168	-23.69%

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 to 2010



Historical Trends By Merchandise Category Lake Elmo

The following tables and charts depict pull factors in Lake Elmo 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.

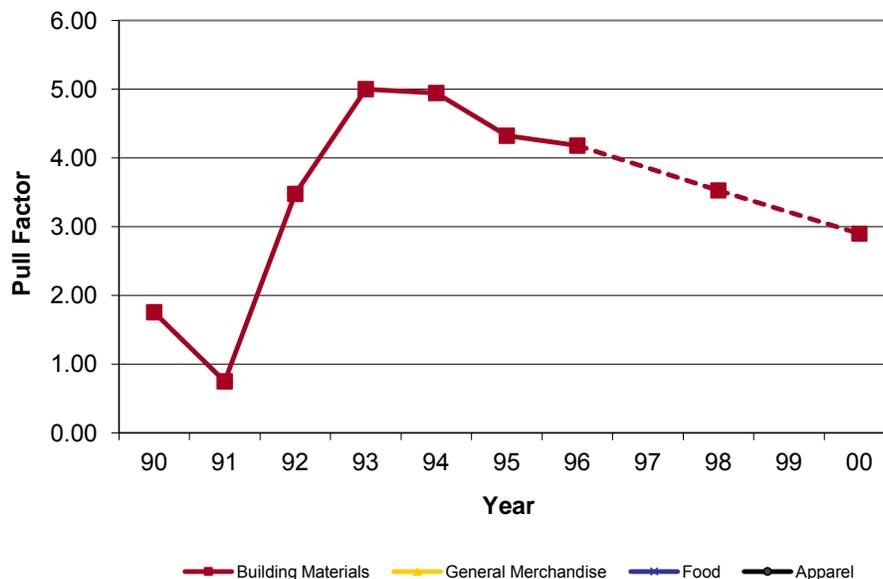
General Merchandise: Includes retail stores which sell a number of lines of merchandise, such as dry goods, apparel and accessories, furniture and home furnishings, small wares, hardware, and food. The stores included in this group are known as department stores, variety stores, general merchandise stores, 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
Lake Elmo, 1990-2000**

Year	Building Materials	General Merchandise	Food	Apparel
1990	1.75	NA	NA	NA
1991	0.75	NA	NA	NA
1992	3.48	NA	NA	NA
1993	5.00	NA	NA	NA
1994	4.94	NA	NA	NA
1995	4.32	NA	NA	NA
1996	4.18	NA	NA	NA
1997	NA	NA	NA	NA
1998	3.53	NA	NA	NA
1999	NA	NA	NA	NA
2000	2.90	NA	NA	NA

% Change, '90 to '00 65.26% NA NA NA

% Change, '98 to '00 -17.75% NA NA NA

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 Lake Elmo

The following tables and charts depict pull factors in Lake Elmo 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.

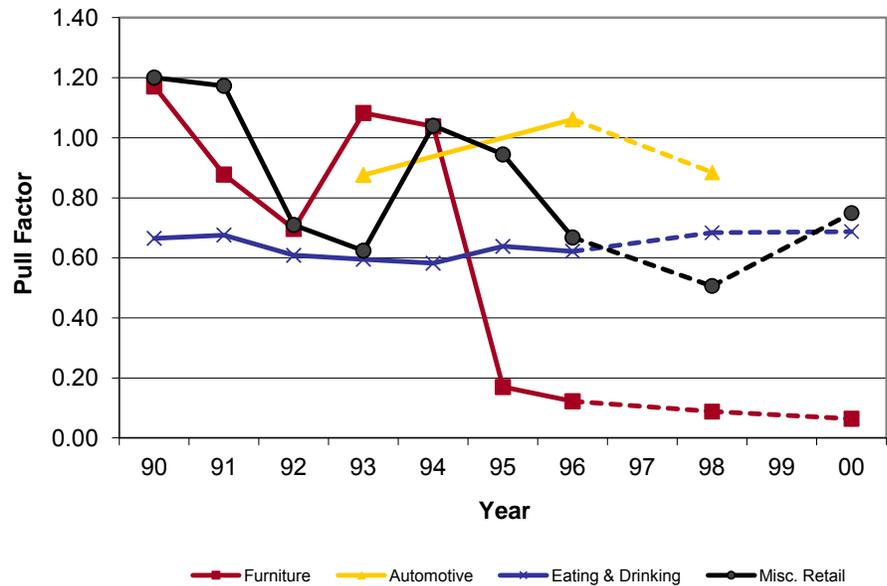
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

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
Lake Elmo, 1990-2000**

Year	Furniture	Automotive	Eating & Drinking	Misc. Retail
1990	1.17	NA	0.66	1.20
1991	0.88	NA	0.68	1.17
1992	0.70	NA	0.61	0.71
1993	1.08	0.88	0.60	0.62
1994	1.04	NA	0.58	1.04
1995	0.17	NA	0.64	0.94
1996	0.12	1.06	0.62	0.67
1997	NA	NA	NA	NA
1998	0.09	0.89	0.68	0.51
1999	NA	NA	NA	NA
2000	0.06	NA	0.69	0.75

% Change, '90 to '00 -94.52% NA 3.39% -37.61%

% Change, '98 to '00 -27.21% NA 0.58% 47.87%

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 Lake Elmo

The following tables and charts depict pull factors in Lake Elmo 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.

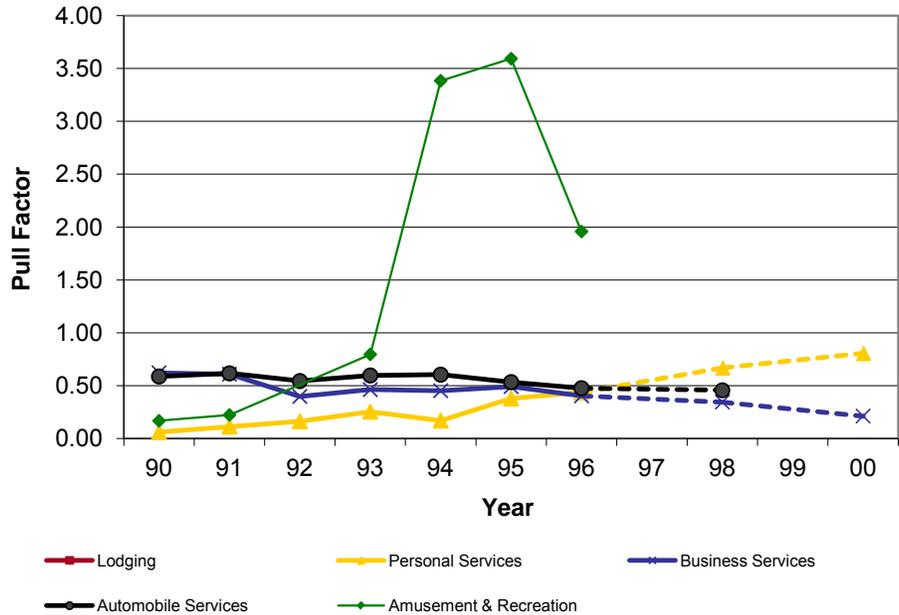
Personal Services: includes establishments primarily engaged in providing services generally to individuals, such as barber and beauty shops, drycleaning plants, laundries, and photographic studios.

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 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 (3 of 3)



**Pull Factors by Merchandise Category
Lake Elmo, 1990-2000**

Year	Lodging	Personal Services	Business Services	Automobile Services	Amusement & Recreation
1990	NA	0.06	0.62	0.59	0.17
1991	NA	0.11	0.61	0.62	0.22
1992	NA	0.16	0.40	0.54	NA
1993	NA	0.25	0.46	0.60	0.80
1994	NA	0.17	0.45	0.60	3.38
1995	NA	0.38	0.49	0.53	3.59
1996	NA	0.44	0.40	0.48	1.96
1997	NA	NA	NA	NA	NA
1998	NA	0.67	0.35	0.46	NA
1999	NA	NA	NA	NA	NA
2000	NA	0.81	0.21	NA	NA
<hr/>					
% Change, '90 to '00	NA	1233.34%	-65.98%	NA	NA
% Change, '98 to '00	NA	20.50%	-38.76%	NA	NA

*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.

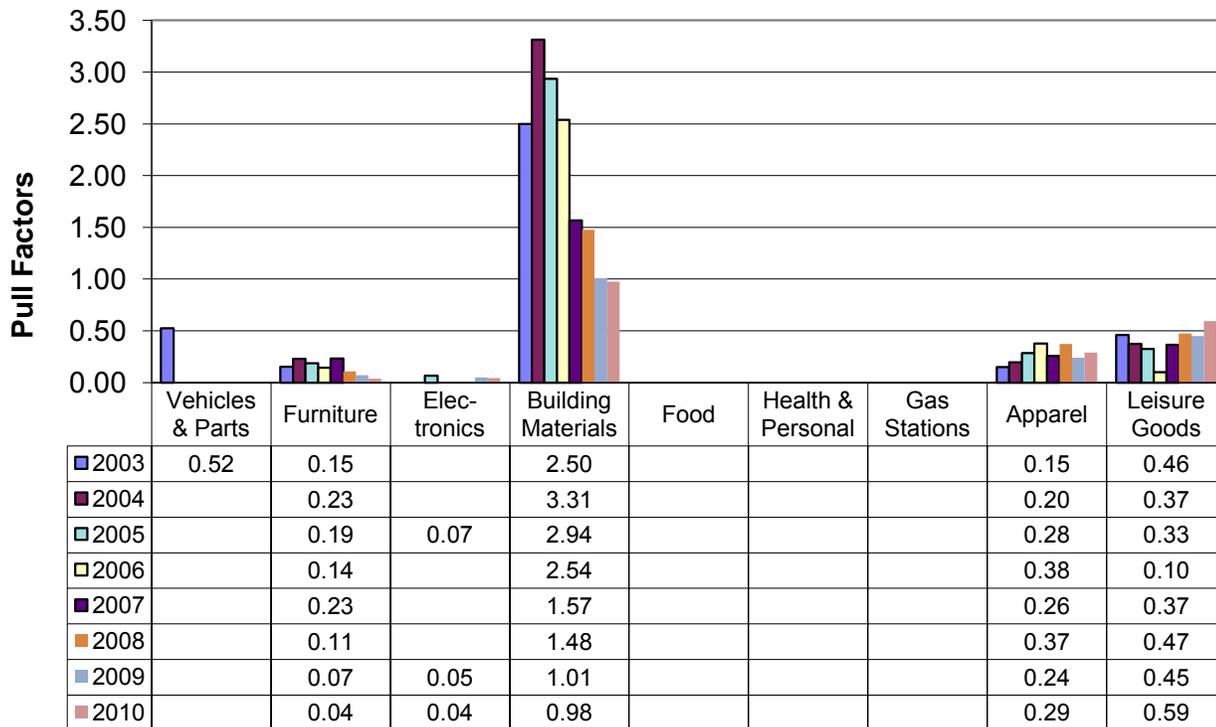
These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide,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

Recent Trends By Merchandise Category

Lake Elmo

The following tables and charts depict pull factors in Lake Elmo 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.

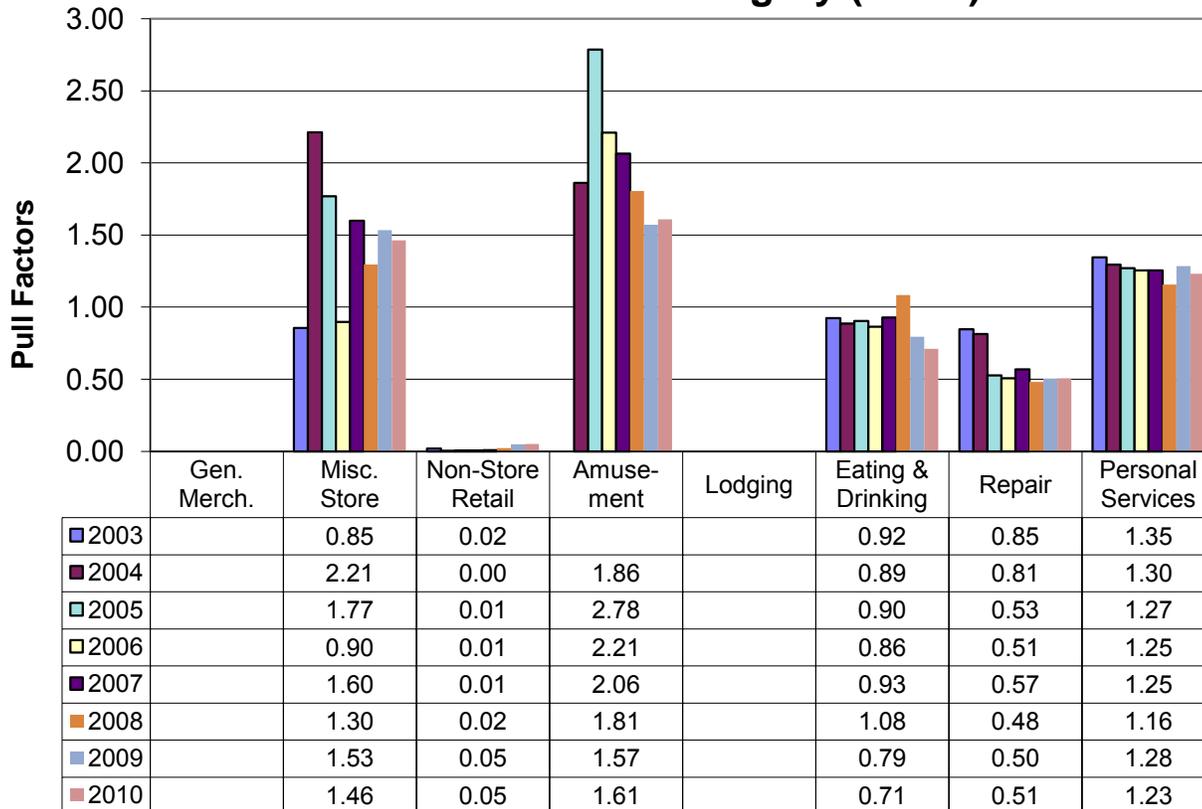
*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Recent Trends By Merchandise Category

Lake Elmo

The following tables and charts depict pull factors in Lake Elmo 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,

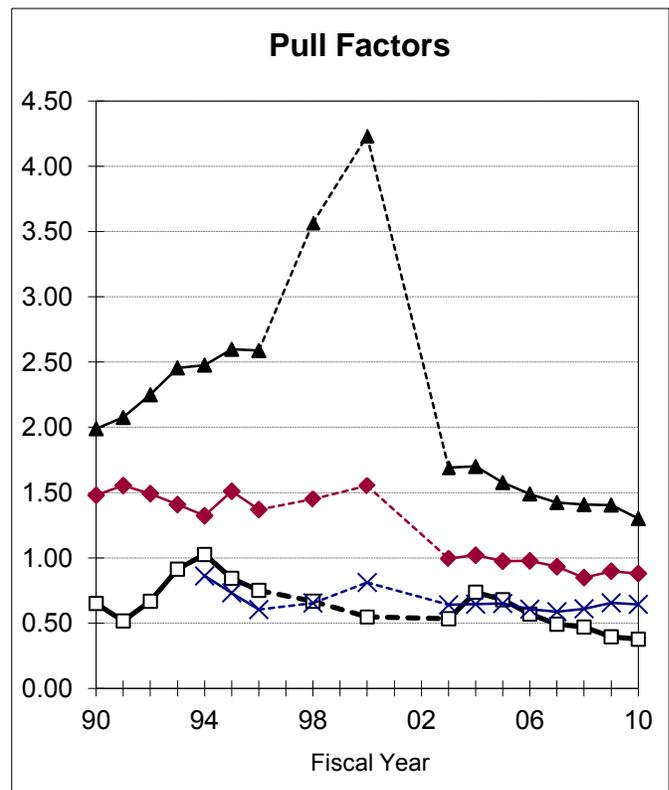
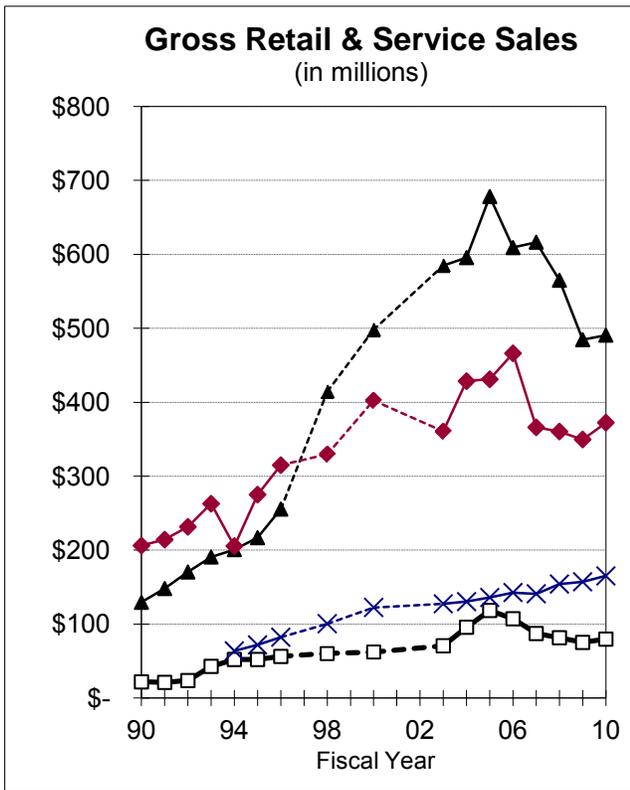
Repair: Businesses that return items to working order. Examples: cars, lawnmowers, small engines, knives, shoes, computers, furniture, and appliances.

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

Lake Elmo



Lake Elmo
 North Branch
 Forest Lake
 Stillwater

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)
Lake Elmo	8,069	\$79.66	\$27.43	163	\$3,399	0.38
Forest Lake	18,375	\$490.75	\$215.68	440	\$11,738	1.30
North Branch	10,125	\$165.18	\$58.84	199	\$5,812	0.64
Stillwater	18,225	\$372.43	\$144.69	506	\$7,939	0.88

Trade Area Analysis of Retail Sales

Lake Elmo

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	\$4.78	NA	NA	NA	NA	NA	NA
Furniture Stores	\$4.48	\$0.11	-\$4.38	-97.6%	-7,874	4	0.4%
Electronics	\$4.09	\$0.11	-\$3.98	-97.3%	-7,849	4	0.4%
Building Materials	\$17.66	\$6.47	-\$11.18	-63.3%	-5,111	5	23.9%
Food, Groceries	\$9.07	NA	NA	NA	NA	NA	NA
Health, Personal Stores	\$1.14	NA	NA	NA	NA	NA	NA
Gasoline Stations	\$2.56	NA	NA	NA	NA	NA	NA
Apparel	\$1.21	\$0.40	-\$0.81	-67.0%	-5,405	4	1.5%
Leisure Goods	\$1.46	\$1.16	-\$0.30	-20.6%	-1,666	5	4.3%
General Merchandise Stores	\$49.29	NA	NA	NA	NA	NA	NA
Miscellaneous Retail	\$8.80	\$3.50	-\$5.30	-60.2%	-4,858	33	12.9%
Amusement & Recreation	\$1.78	\$3.55	+\$1.77	+99.2%	8,006	4	13.1%
Accommodations	\$4.92	NA	NA	NA	NA	NA	NA
Eating & Drinking Places	\$12.04	\$7.35	-\$4.69	-39.0%	-3,144	11	27.1%
Repair, Maintenance	\$2.02	\$0.85	-\$1.17	-57.8%	-4,665	8	3.1%
Personal Services, Laundry	\$0.65	\$1.43	+\$0.78	+120.8%	9,745	15	5.3%
Total Taxable Retail & Service	\$77.59	\$27.07	-\$50.52	-65.1%	-5,254	163	100.0%

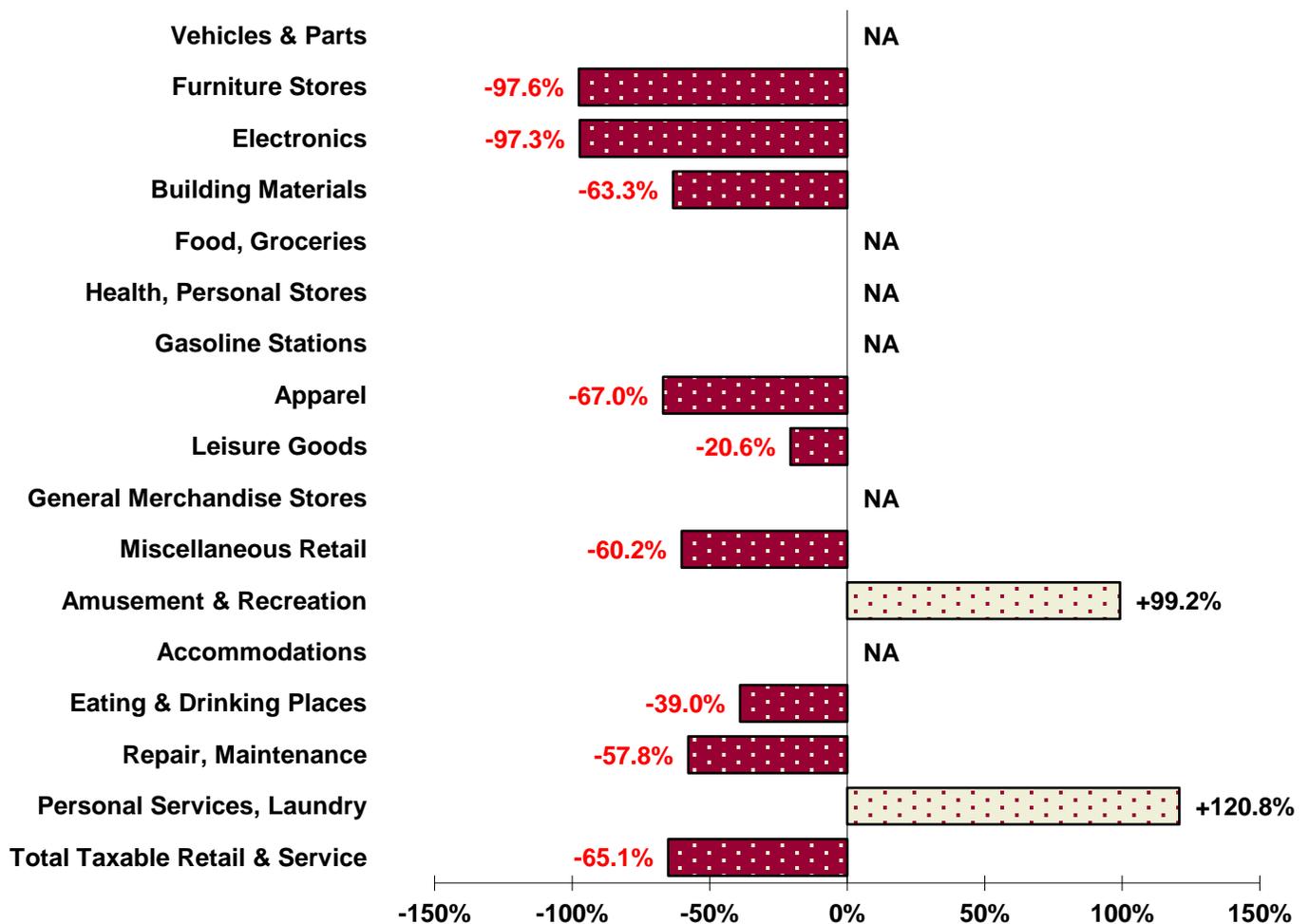
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of Lake Elmo Retail Trade

The chart below depicts the percentage amount Lake Elmo's actual sales were above or below expected sales in 2010 by merchandise group. Of the 10 merchandise categories with reported data, sales in 2 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 Personal Services, Laundry category, which has a 120.8 percent surplus. Overall, Lake Elmo had a retail sales leakage of 65.1 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 6,100 & 9,200 (Range: Population of Lake Elmo +/- ~ 20%.) (20 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																		
Mound	9,052	0.03					0.98	1.00		0.04		3.56			0.61	0.56	0.60	0.30
Virginia	8,712	2.50	0.92	0.94	0.62	1.56	1.45	1.81	0.42	1.45	4.23	0.63	0.85	0.47	1.51	0.60	0.66	1.44
East Grand Forks	8,601	1.12				1.13			0.19	5.88		2.64	0.44		1.17	0.32	0.20	0.58
Thief River Falls	8,573	1.80		0.35	1.04	2.04	0.98		0.51	0.60	3.38	2.00	0.18		0.91	0.67	0.44	0.99
Detroit Lakes	8,569	1.49	0.80		1.13		0.35	1.86	0.74	0.72	5.07	4.81	0.55	3.62	2.16	1.92	1.11	1.55
St Anthony	8,437	0.95				3.02	3.21	1.01		0.46		10.54	0.31		1.18	0.79	0.09	0.86
Little Falls	8,343	0.86	0.62	0.62	0.59	2.20	1.04	2.92	0.61	0.20	3.79	0.56	0.31	0.42	1.35	0.96	0.24	1.07
Cambridge	8,111	2.38		0.63			2.06	2.29	0.31	0.43	7.44	21.44			1.54	2.01	0.58	2.07
Lake Elmo	8,069		0.06	0.04	0.98				0.29	0.59		1.46	1.61		0.71	0.51	1.23	0.38
Oak Grove	8,031									0.01		1.79	0.85		0.15	1.24	0.22	0.17
Crookston	7,891	0.59			1.12	0.84	0.32	0.60	0.21	0.16		9.87	0.37		0.89	2.15	0.10	0.74
Mahtomedi	7,676	0.08				0.84		1.14		0.05		1.19	0.04		0.55	0.59	0.41	0.24
Baxter	7,610	5.81	2.70	7.61	10.97	4.18	0.17	1.83	3.77	3.49	15.23	2.74	1.70	4.29	2.50	1.96	1.22	4.61
Orono	7,437	2.06	0.37	0.10	0.49	1.12				0.10		1.40	4.47		0.46	0.26	0.51	0.57
Shorewood	7,307		0.04							0.71		6.75	1.68		0.41	0.90	1.92	0.42
Litchfield	6,726	1.05			1.33	0.91		0.85		0.11	0.33	0.61	0.48		0.90	1.14	0.13	0.51
Waite Park	6,715	3.35	12.84	1.18	14.29	6.32		2.47	11.05	6.33	8.03	4.60	0.29	1.47	3.97	4.41	1.42	4.69
St Joseph	6,534					1.36				0.06		1.98			0.31	0.77	0.26	0.23
International Falls	6,424	1.28			4.20	1.27		2.39	0.37	1.28	1.89	1.89		0.75	1.35	0.86	0.13	1.17
Spring Lake Park	6,412	1.92								0.58		6.62			1.39	4.43	0.23	2.76
Unadjusted Average: *		1.72	2.29	1.43	3.26	2.13	1.17	1.62	1.81	1.19	5.94	4.37	0.94	2.05	1.18	1.21	0.63	1.19

* 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 6,100 & 9,200 (Range: Population of Lake Elmo +/- ~ 20%.) (20 Cities)

Rankings

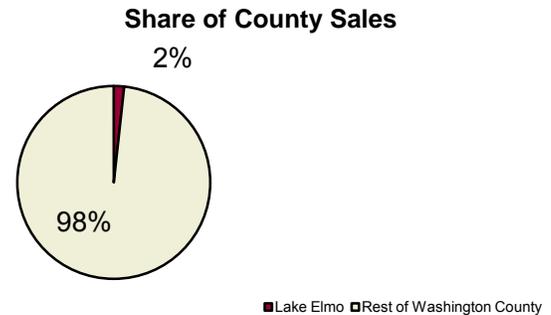
Town	Population	Vehicles, Parts	Furniture Stores	Elec- tronics	Building Materials	Food	Health, Personal	Gasoline Stations	Apparel	Leisure Goods	General Merch.	Misc.	Amuse- ment	Lodging	Eating & Drinking	Repair, Maint.	Personal Services	Taxable \$ Pull Factor
Town name																		
Mound	# 1	# 16					# 6	# 10		# 19		# 8			# 15	# 17	# 7	# 17
Virginia	# 2	# 3	# 3	# 3	# 9	# 6	# 3	# 7	# 6	# 4	# 5	# 18	# 6	# 5	# 5	# 15	# 6	# 6
East Grand Forks	# 3	# 10				# 9			# 11	# 2		# 10	# 9		# 10	# 19	# 16	# 12
Thief River Falls	# 4	# 7		# 6	# 7	# 5	# 5		# 5	# 8	# 7	# 11	# 14		# 11	# 14	# 10	# 9
Detroit Lakes	# 5	# 8	# 4		# 5		# 7	# 5	# 3	# 6	# 4	# 6	# 7	# 2	# 3	# 6	# 5	# 5
St Anthony	# 6	# 12				# 3	# 1	# 9		# 11		# 2	# 11		# 9	# 12	# 20	# 10
Little Falls	# 7	# 13	# 5	# 5	# 10	# 4	# 4	# 1	# 4	# 13	# 6	# 20	# 12	# 6	# 8	# 9	# 13	# 8
Cambridge	# 8	# 4		# 4			# 2	# 4	# 8	# 12	# 3	# 1			# 4	# 4	# 8	# 4
Lake Elmo	# 9		# 7	# 8	# 8				# 9	# 9		# 15	# 4		# 14	# 18	# 3	# 16
Oak Grove	# 10									# 20		# 14	# 5		# 20	# 7	# 15	# 20
Crookston	# 11	# 14			# 6	# 12	# 8	# 12	# 10	# 14		# 3	# 10		# 13	# 3	# 19	# 11
Mahtomedi	# 12	# 15				# 13		# 8		# 18		# 17	# 15		# 16	# 16	# 11	# 18
Baxter	# 13	# 1	# 2	# 1	# 2	# 2	# 9	# 6	# 2	# 3	# 1	# 9	# 2	# 1	# 2	# 5	# 4	# 2
Orono	# 14	# 5	# 6	# 7	# 11	# 10				# 16		# 16	# 1		# 17	# 20	# 9	# 13
Shorewood	# 15		# 8							# 7		# 4	# 3		# 18	# 10	# 1	# 15
Litchfield	# 16	# 11			# 4	# 11		# 11		# 15	# 9	# 19	# 8		# 12	# 8	# 17	# 14
Waite Park	# 17	# 2	# 1	# 2	# 1	# 1		# 2	# 1	# 1	# 2	# 7	# 13	# 3	# 1	# 2	# 2	# 1
St Joseph	# 18					# 7				# 17		# 12			# 19	# 13	# 12	# 19
International Falls	# 19	# 9			# 3	# 8		# 3	# 7	# 5	# 8	# 13		# 4	# 7	# 11	# 18	# 7
Spring Lake Park	# 20	# 6								# 10		# 5			# 6	# 1	# 14	# 3

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.

Lake Elmo & Washington 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 Lake Elmo and Washington County in 2010. Lake Elmo accounted for 4 percent of the county's firms and 2 percent of the county's sales.



Sales by Merchandise Category, Lake Elmo & Washington County, 2010

Merchandise Category	Lake Elmo		Washington County		City's Share of County Total	
	Taxable Sales (\$millions)	Number of Firms	Taxable Sales (\$millions)	Number of Firms	Sales	Firms
Vehicles & Parts	NA	NA	\$55.48	87	NA	NA
Furniture Stores	\$0.11	4	\$55.40	99	0.2%	4.0%
Electronics	\$0.11	4	\$61.48	51	0.2%	7.8%
Building Materials	\$6.47	5	\$243.11	62	2.7%	8.1%
Food, Groceries	NA	NA	\$137.05	123	NA	NA
Health, Personal Stores	NA	NA	\$26.82	58	NA	NA
Gasoline Stations	NA	NA	\$31.99	62	NA	NA
Apparel	\$0.40	4	\$40.23	158	1.0%	2.5%
Leisure Goods	\$1.16	5	\$64.53	160	1.8%	3.1%
General Merchandise	NA	NA	\$272.20	30	NA	NA
Miscellaneous Retail	\$3.50	28	\$69.34	497	5.1%	5.6%
Non-Store Retailers	\$0.11	12	\$6.02	227	1.9%	5.3%
Amusement & Recreation	\$3.55	4	\$63.73	103	5.6%	3.9%
Accommodations	NA	NA	\$25.18	48	NA	NA
Eating & Drinking Places	\$7.35	11	\$264.39	396	2.8%	2.8%
Repair, Maintenance	\$0.85	8	\$31.28	246	2.7%	3.3%
Personal Service, Laundry	\$1.43	15	\$23.50	313	6.1%	4.8%
Total Sales*	\$27.43	163	\$1,590.71	4,338	1.7%	3.8%

Stillwater Retail Trade Overview

Total Taxable and Gross Retail Sales

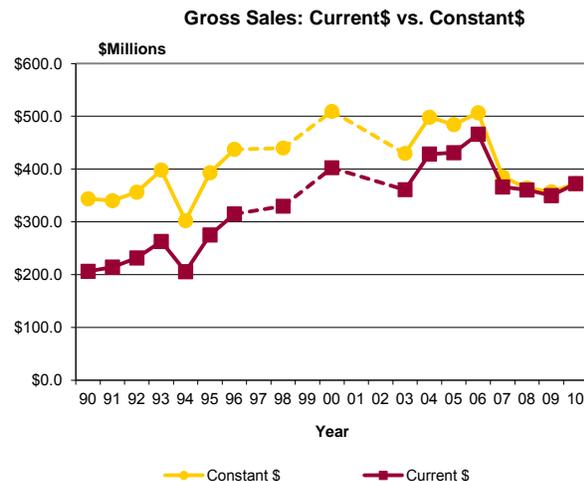
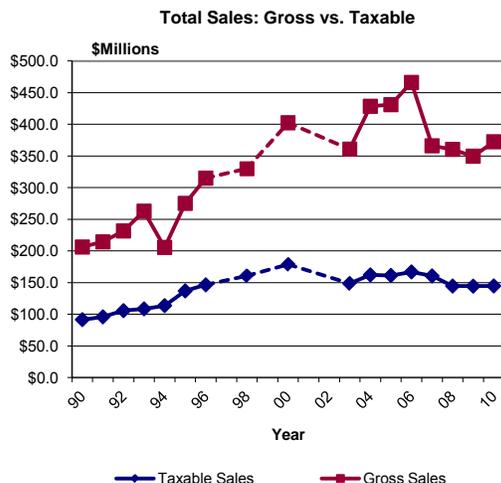
The table below presents gross and taxable retail and services sales for Stillwater from 1990 through 2010. Without inflation adjustments, taxable sales in Stillwater declined 2.5 percent from 2003 to 2010, while the number of firms rose 11.2 percent. Statewide, taxable sales increased 6.1 percent over 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 Stillwater totaled \$91.46 million, an amount worth \$152.43 million in 2010 dollars. In constant dollars, gross sales fell 13.3 percent between 2003 and 2010. Constant dollar taxable sales decreased 18.1 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	14,058	\$206.18	\$91.46	\$343.63	\$152.43	593	\$6,506	1.48
1991	14,067	\$214.26	\$95.87	\$340.09	\$152.18	604	\$6,815	1.55
1992	14,632	\$231.55	\$105.66	\$356.22	\$162.55	624	\$7,221	1.49
1993	15,277	\$262.79	\$108.48	\$398.16	\$164.36	635	\$7,101	1.41
1994	15,689	\$205.52	\$113.62	\$302.23	\$167.08	669	\$7,242	1.32
1995	15,888	\$275.09	\$136.88	\$392.98	\$195.54	671	\$8,615	1.51
1996	15,966	\$314.95	\$146.42	\$437.44	\$203.36	708	\$9,171	1.37
1997	15,949	NA	NA	NA	NA	NA	\$0	NA
1998	15,904	\$329.81	\$160.69	\$439.75	\$214.25	746	\$10,103	1.45
1999	15,878	NA	NA	NA	NA	NA	\$0	NA
2000	15,143	\$402.42	\$178.84	\$509.39	\$226.39	700	\$11,810	1.55
2001	15,884	NA	NA	NA	NA	NA	\$0	NA
2002	16,205	NA	NA	NA	NA	NA	\$0	NA
2003	16,734	\$360.87	\$148.39	\$429.60	\$176.66	455	\$8,868	0.99
2004	17,171	\$428.50	\$162.13	\$498.26	\$188.53	475	\$9,442	1.02
2005	17,380	\$431.04	\$161.30	\$484.32	\$181.23	489	\$9,281	0.97
2006	17,781	\$466.15	\$166.88	\$506.68	\$181.39	485	\$9,385	0.98
2007	17,716	\$366.06	\$160.57	\$385.33	\$169.02	500	\$9,064	0.93
2008	17,812	\$360.43	\$144.58	\$364.07	\$146.04	524	\$8,117	0.85
2009	17,951	\$349.66	\$144.34	\$356.80	\$147.29	539	\$8,041	0.90
2010	18,225	\$372.43	\$144.69	\$372.43	\$144.69	506	\$7,939	0.88
7 yr Change '03 to '10	8.9%	3.2%	-2.5%	-13.3%	-18.1%	11.2%	-10.5%	-11.4%
3 yr Change '07 to '10	2.9%	1.7%	-9.9%	-3.3%	-14.4%	1.2%	-12.4%	-5.6%

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

Stillwater: Total Retail Sales

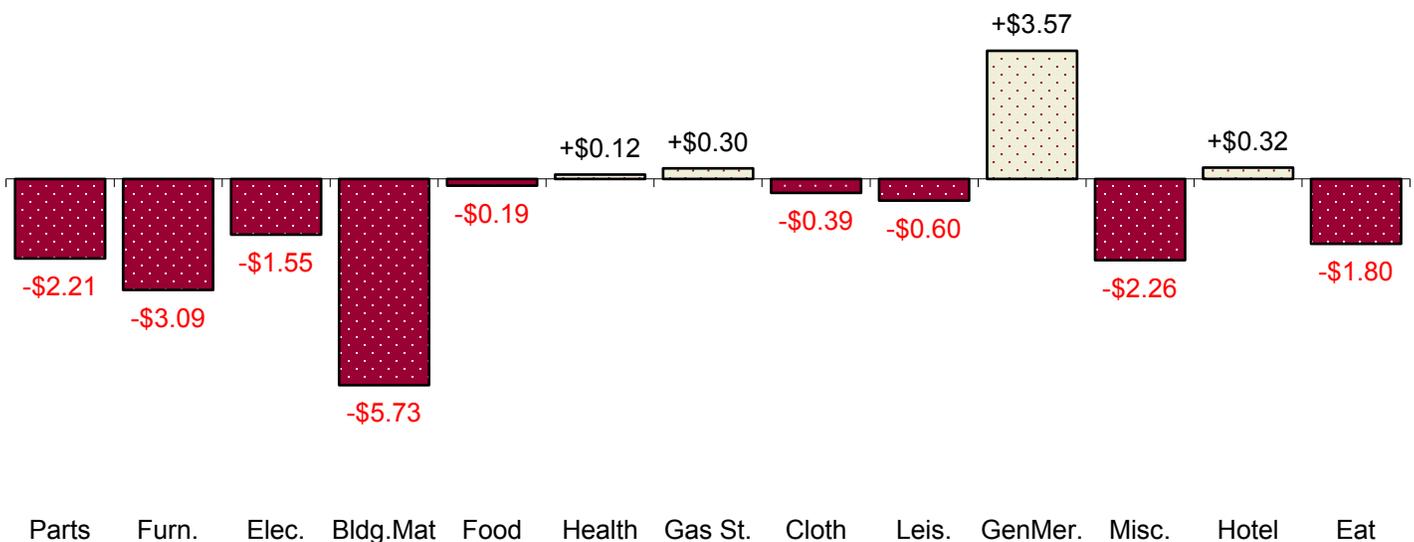


Stillwater Components of Change, 2007 to 2010

Category	Taxable Sales 2007	Taxable Sales 2010	Dollar Change	Percent Change
Vehicles & Parts	\$4,085,655	\$1,874,334	-\$2,211,321	-54.12%
Furniture Stores	\$4,385,216	\$1,297,169	-\$3,088,047	-70.42%
Electronics	\$2,336,164	\$787,748	-\$1,548,416	-66.28%
Building Materials	\$16,611,787	\$10,876,844	-\$5,734,943	-34.52%
Food, Groceries	\$21,737,565	\$21,551,944	-\$185,621	-0.85%
Health, Personal Stores	\$723,933	\$846,900	+\$122,967	+16.99%
Gasoline Stations	\$2,272,410	\$2,568,264	+\$295,854	+13.02%
Apparel	\$1,309,770	\$923,316	-\$386,454	-29.51%
Leisure Goods	\$1,913,928	\$1,313,009	-\$600,919	-31.40%
General Merchandise Stores	\$25,266,256	\$28,831,652	+\$3,565,396	+14.11%
Miscellaneous Retail	\$17,345,088	\$15,085,753	-\$2,259,335	-13.03%
Accommodations	\$4,181,337	\$4,498,046	+\$316,709	+7.57%
Eating & Drinking	+\$35,272,227	+\$33,468,541	-\$1,803,686	-5.11%
Total Retail and Services Sales	\$160,573,492	\$144,690,067	-\$15,883,425	-9.89%

Figures not adjusted for inflation.

Dollar Changes by Category (in Millions) 2007 to 2010



Historical Trends By Merchandise Category Stillwater

The following tables and charts depict pull factors in Stillwater 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.

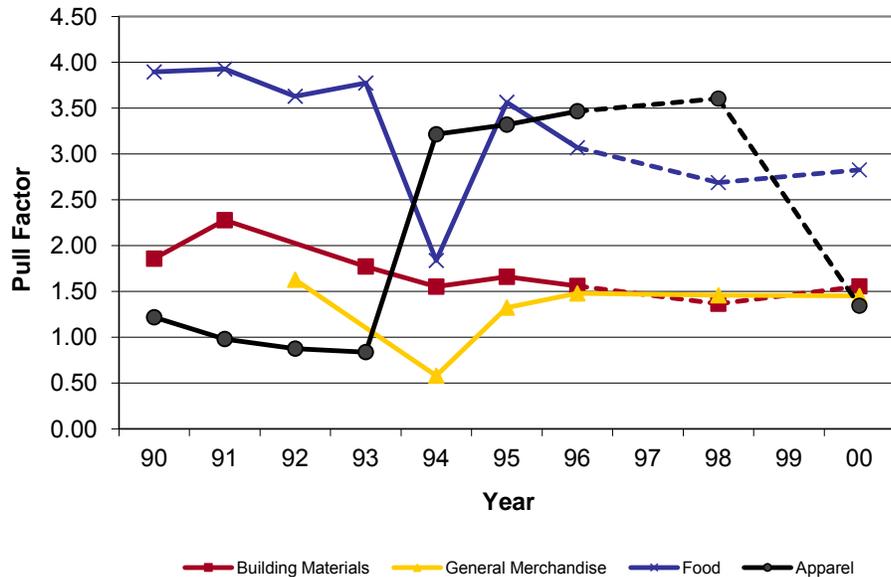
General Merchandise: Includes retail stores which sell a number of lines of merchandise, such as dry goods, apparel and accessories, furniture and home furnishings, small wares, hardware, and food. The stores included in this group are known as department stores, variety stores, general merchandise stores, 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
Stillwater, 1990-2000

Year	Building Materials	General Merchandise	Food	Apparel
1990	1.86	NA	3.89	1.22
1991	2.28	NA	3.93	0.98
1992	NA	1.63	3.63	0.88
1993	1.77	NA	3.77	0.84
1994	1.55	0.58	1.84	3.21
1995	1.66	1.32	3.56	3.32
1996	1.56	1.48	3.07	3.47
1997	NA	NA	NA	NA
1998	1.36	1.46	2.69	3.60
1999	NA	NA	NA	NA
2000	1.56	1.45	2.83	1.34

% Change, '90 to '00 -16.17% NA -27.39% 10.37%

% Change, '98 to '00 14.18% -0.53% 5.22% -62.70%

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 Stillwater

The following tables and charts depict pull factors in Stillwater 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.

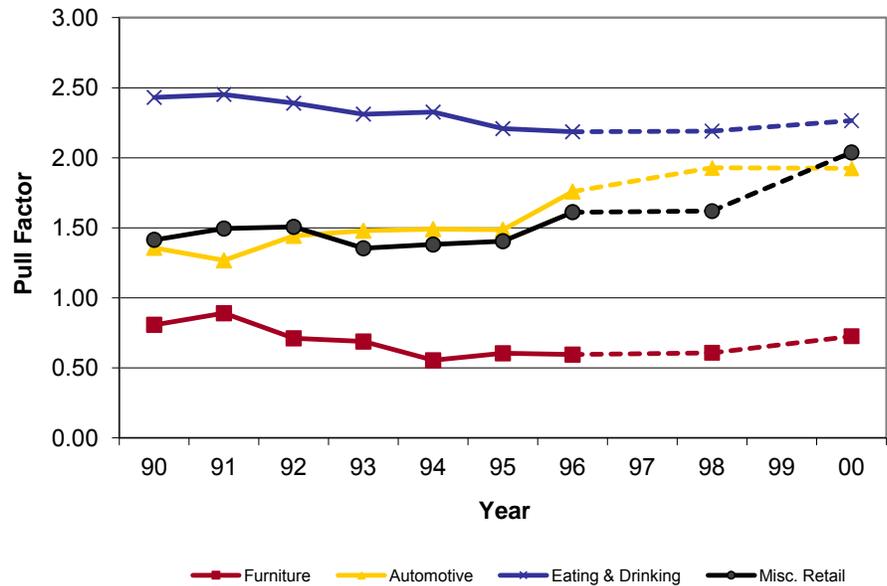
Automotive: Establishments selling new and used automobiles, boats, recreational vehicles and utility trailers, and motorcycles and mopeds; dealers selling new automobile parts and accessories; and gasoline service stations.

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 Stillwater, 1990-2000

Year	Furniture	Automotive	Eating & Drinking	Misc. Retail
1990	0.81	1.36	2.43	1.41
1991	0.89	1.27	2.45	1.49
1992	0.71	1.44	2.39	1.51
1993	0.69	1.48	2.31	1.35
1994	0.55	1.49	2.33	1.38
1995	0.60	1.49	2.21	1.40
1996	0.60	1.76	2.19	1.61
1997	NA	NA	NA	NA
1998	0.61	1.93	2.19	1.62
1999	NA	NA	NA	NA
2000	0.73	1.93	2.26	2.04

% Change, '90 to '00 -10.13% 41.82% -6.84% 44.09%

% Change, '98 to '00 19.35% -0.16% 3.40% 25.86%

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 Stillwater

The following tables and charts depict pull factors in Stillwater 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.

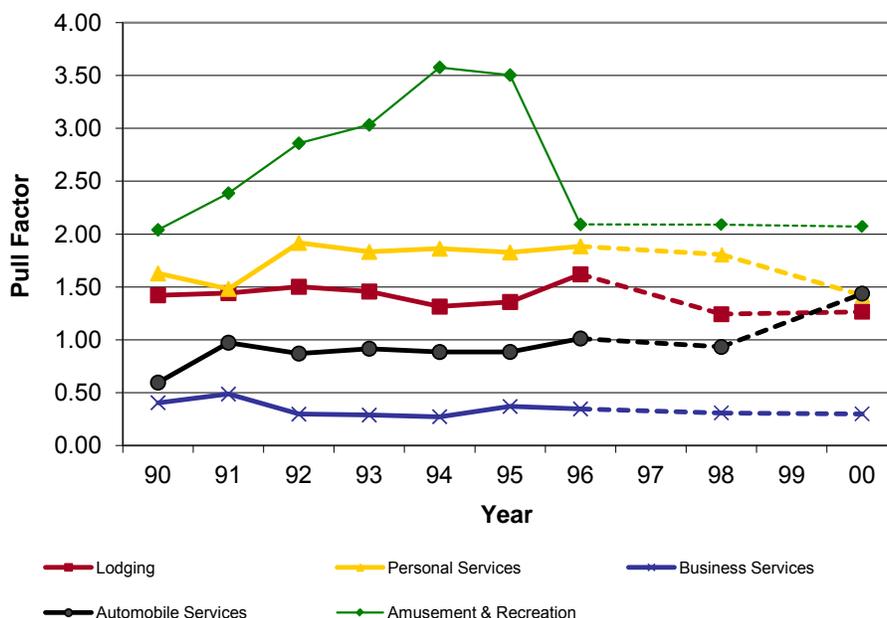
Personal Services: includes establishments primarily engaged in providing services generally to individuals, such as barber and beauty shops, drycleaning plants, laundries, and photographic studios.

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 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 (3 of 3)



Pull Factors by Merchandise Category Stillwater, 1990-2000

Year	Lodging	Personal Services	Business Services	Automobile Services	Amusement & Recreation
1990	1.42	1.63	0.41	0.60	2.04
1991	1.44	1.48	0.49	0.97	2.39
1992	1.50	1.92	0.30	0.87	2.86
1993	1.46	1.83	0.29	0.92	3.03
1994	1.31	1.86	0.27	0.88	3.58
1995	1.36	1.83	0.37	0.89	3.50
1996	1.62	1.88	0.35	1.01	2.09
1997	NA	NA	NA	NA	NA
1998	1.24	1.81	0.31	0.93	2.09
1999	NA	NA	NA	NA	NA
2000	1.27	1.42	0.30	1.44	2.07
% Change, '90 to '00					
	-10.94%	-12.59%	-26.10%	141.29%	1.45%
% Change, '98 to '00					
	1.79%	-21.23%	-2.98%	54.11%	-0.96%

*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.

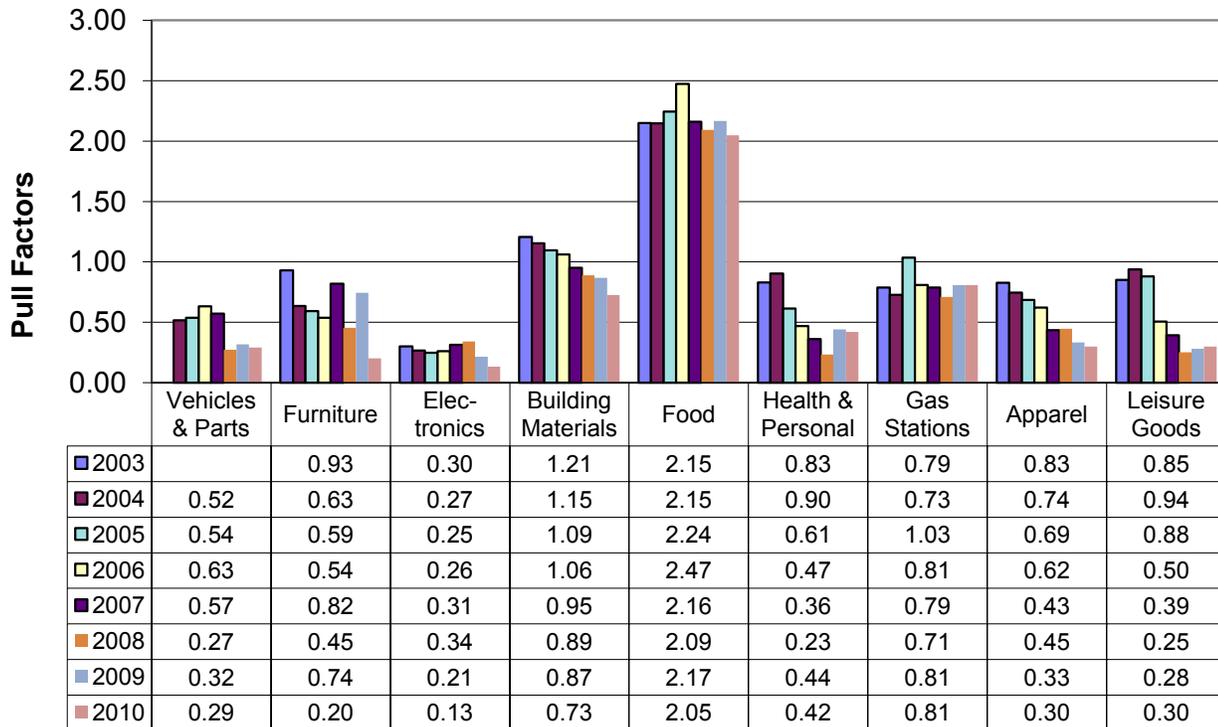
These pull factors are calculated using taxable sales. Although taxable sales do not capture the full extent of sales in stores with a large number of un-taxed goods, like grocery and apparel stores, these data are audited by the Minnesota Department of Revenue. Since sales tax laws apply statewide,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

Recent Trends By Merchandise Category

Stillwater

The following tables and charts depict pull factors in Stillwater 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.

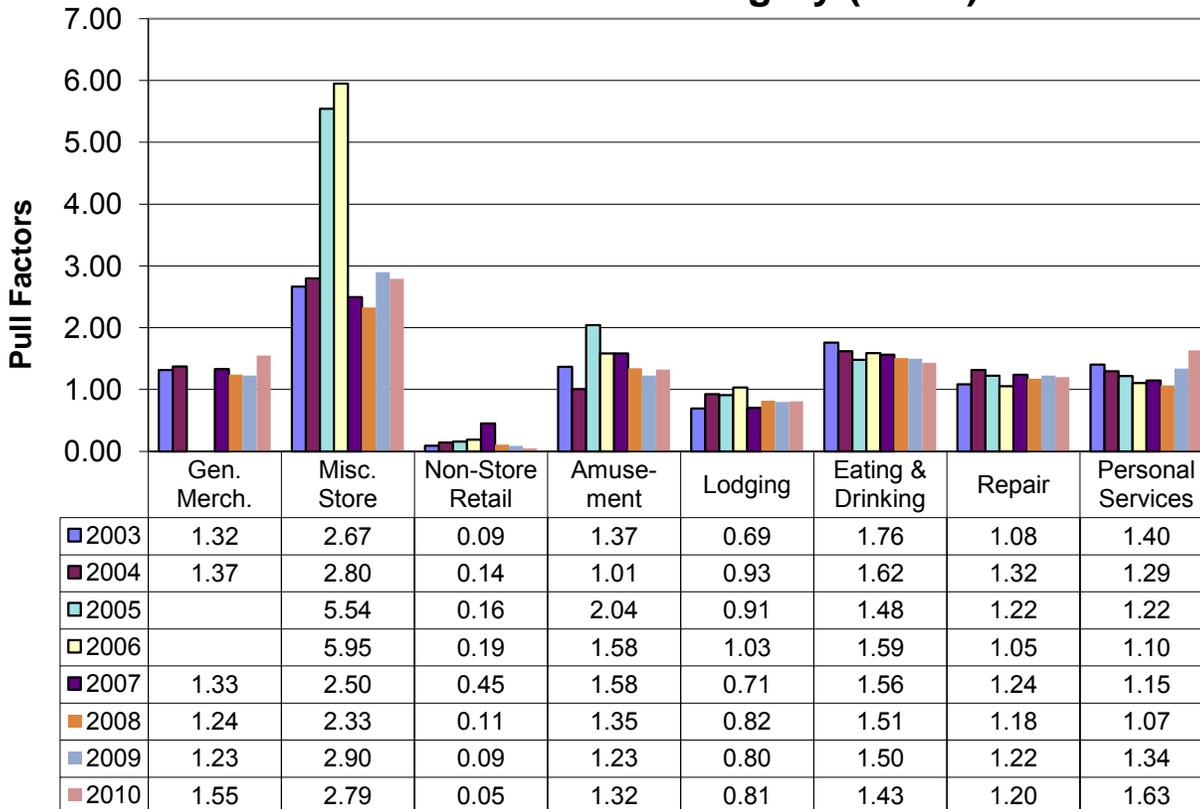
*Caution should be used when comparing pull factors before 2003 to those in later years due to how businesses are classified.

Recent Trends By Merchandise Category

Stillwater

The following tables and charts depict pull factors in Stillwater 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.

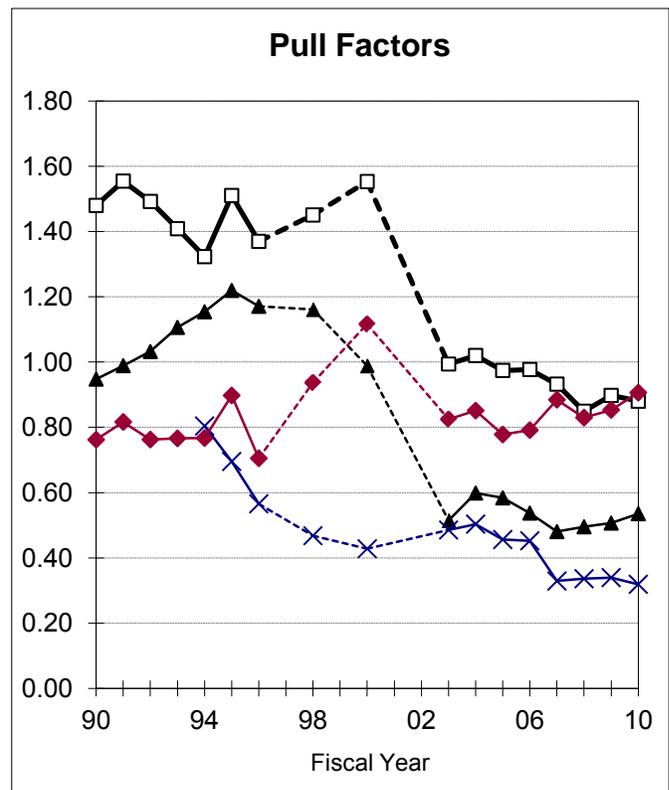
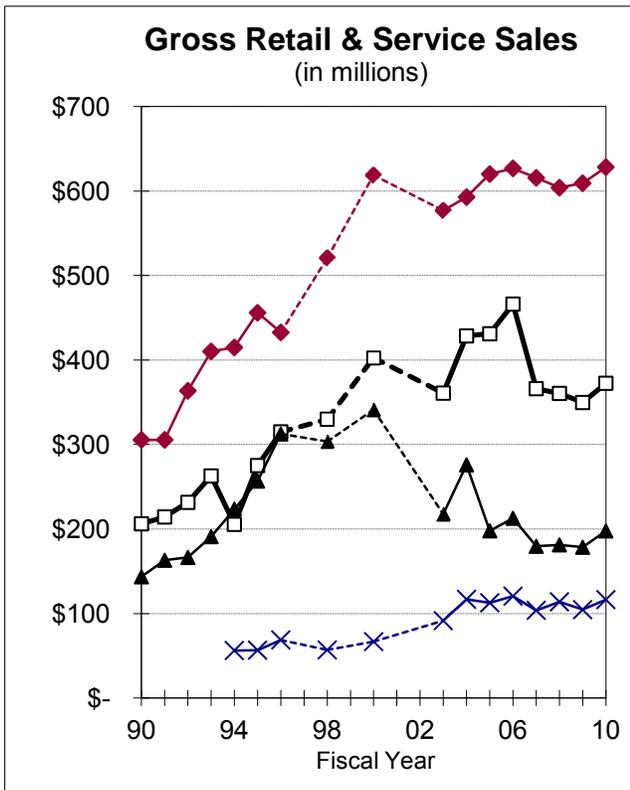
Eating & Drinking: Restaurants, donut shops, coffee house, cafeteria, caterers, taverns, and nightclubs,

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 Stillwater



Stillwater
 Farmington

Anoka
 White Bear Lake

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)
Stillwater	18,225	\$372.43	\$144.69	506	\$7,939	0.88
Anoka	17,142	\$197.71	\$82.79	375	\$4,829	0.54
Farmington	21,086	\$116.44	\$60.71	242	\$2,879	0.32
White Bear Lake	23,797	\$628.22	\$194.56	543	\$8,176	0.91

Trade Area Analysis of Retail Sales

Stillwater

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	\$10.71	\$1.87	-\$8.84	-82.5%	-15,037	7	1.3%
Furniture Stores	\$2.37	\$1.30	-\$1.07	-45.2%	-8,236	19	0.9%
Electronics	\$3.05	\$0.79	-\$2.27	-74.2%	-13,524	6	0.5%
Building Materials	\$27.83	\$10.88	-\$16.96	-60.9%	-11,103	7	7.5%
Food, Groceries	\$11.30	\$21.55	+\$10.25	+90.7%	16,535	14	14.9%
Health, Personal Stores	\$2.52	\$0.85	-\$1.68	-66.4%	-12,110	5	0.6%
Gasoline Stations	\$4.16	\$2.57	-\$1.60	-38.3%	-6,986	7	1.8%
Apparel	\$1.17	\$0.92	-\$0.24	-20.9%	-3,800	18	0.6%
Leisure Goods	\$1.70	\$1.31	-\$0.39	-22.7%	-4,139	16	0.9%
General Merchandise Stores	\$45.86	\$28.83	-\$17.02	-37.1%	-6,766	6	20.0%
Miscellaneous Retail	\$10.88	\$15.09	+\$4.21	+38.7%	7,054	58	10.5%
Amusement & Recreation	\$3.27	\$6.60	+\$3.33	+102.0%	18,583	10	4.6%
Accommodations	\$6.44	\$4.50	-\$1.94	-30.1%	-5,487	14	3.1%
Eating & Drinking Places	\$23.20	\$33.47	+\$10.27	+44.3%	8,067	58	23.2%
Repair, Maintenance	\$4.73	\$4.57	-\$0.16	-3.5%	-634	24	3.2%
Personal Services, Laundry	\$1.99	\$4.28	+\$2.28	+114.8%	20,921	49	3.0%
Total Taxable Retail & Service	\$138.39	\$144.34	+\$5.95	+4.3%	784	506	100.0%

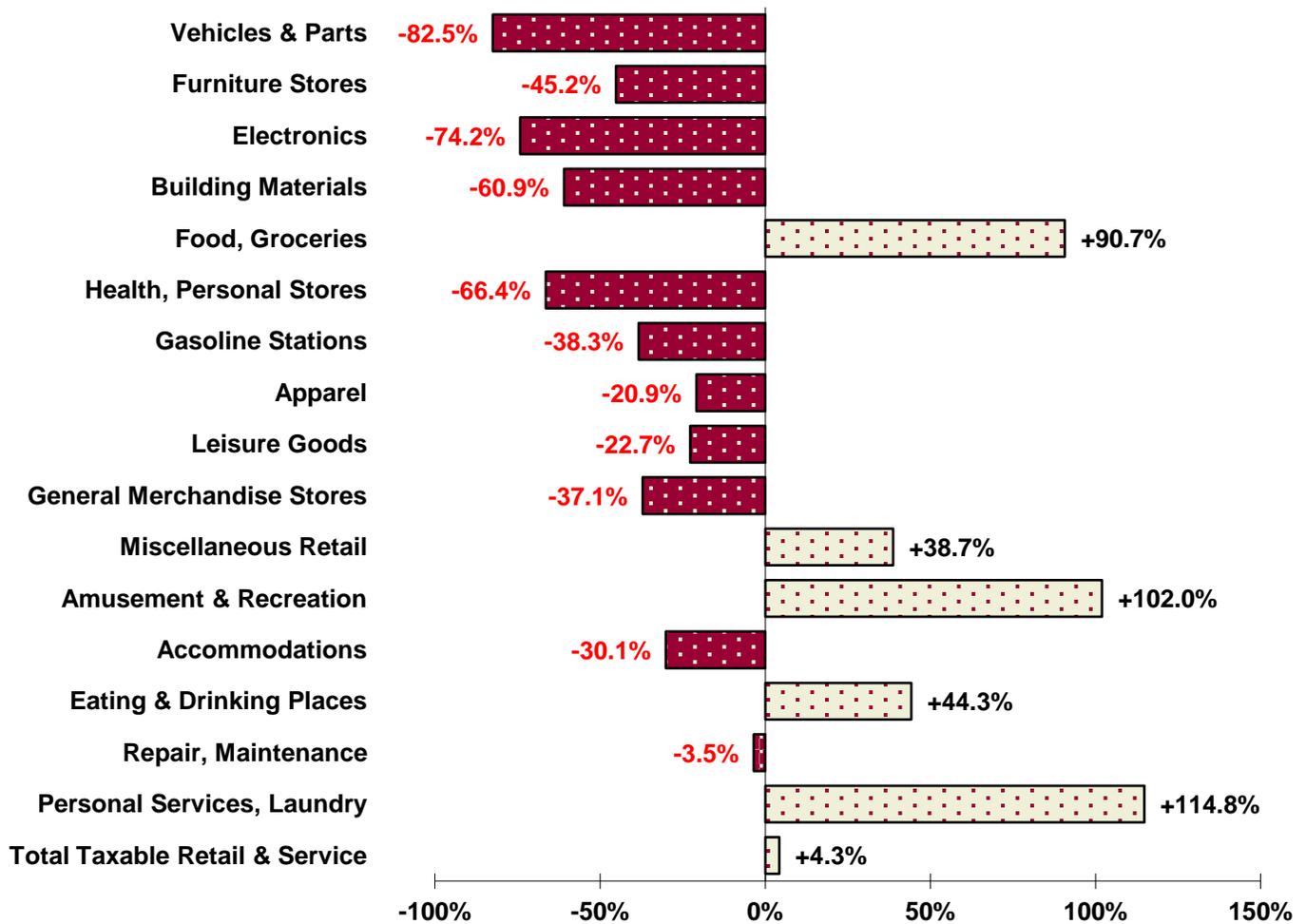
*All retail and service categories are included in Total Sales, including some categories not shown. Therefore, the merchandise groups shown here generally will not sum to Total Sales.

Summary of Stillwater Retail Trade

The chart below depicts the percentage amount Stillwater's actual sales were above or below expected sales in 2010 by merchandise group. Of the 16 merchandise categories with reported data, sales in 5 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 Personal Services, Laundry category, which has a 114.8 percent surplus. Overall, Stillwater had a retail sales surplus of 4.3 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 14,300 & 21,600 (Range: Population of Stillwater +/- ~ 20%.) (21 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																		
New Brighton	21,456	0.34	0.49			0.58	0.12	0.98	0.13	0.05		1.04	0.46		0.62	0.74	0.27	0.27
Farmington	21,086				1.63	0.54		0.96	0.19	0.01		0.32	0.25		0.33	0.43	0.64	0.32
Golden Valley	20,371	5.88	2.15	1.74	2.53	1.14	1.08	0.94	0.57	0.76		0.71	1.74	0.61	2.44	3.72	1.34	1.60
New Hope	20,339	0.38	0.21	0.63	0.38	0.27	1.70	0.83	0.01	0.04		1.32			0.70	1.19	1.48	0.37
Lino Lakes	20,216	2.64			0.43	0.30			1.29	0.23		4.32	0.23		0.34	0.57	0.09	0.43
Northfield	20,007	0.71	0.26			0.99	0.82	1.14	0.15	0.14		4.15	0.46	0.21	0.85	1.06	0.29	0.51
Willmar	19,610	2.02	2.37	2.63	3.89	1.95	1.24	1.37	0.87	0.76	3.08	2.51	0.45	3.17	1.18	1.65	0.63	1.68
West St Paul	19,540	1.29	0.39	0.25	3.35	1.49	1.91	0.93	0.62	0.74	3.13	2.54	0.87		1.78	1.04	0.96	1.37
South St Paul	19,498	1.87				0.37		1.79	0.04	1.02		1.12	0.84		0.42	2.31	0.24	0.43
Columbia Heights	19,496	0.94	0.86		0.13	1.00		2.25	0.44	0.04	0.11	0.36	0.08		0.76	1.35	0.08	0.37
Forest Lake	18,375	1.28	0.07	0.16	3.87	1.50	1.11	1.63	0.06	0.56		12.40	0.61	0.35	1.43	1.20	0.93	1.30
Stillwater	18,225	0.29	0.32	0.13	0.73	2.05	0.42	0.81	0.30	0.30	1.55	2.79	1.32	0.81	1.43	1.20	1.63	0.88
Albert Lea	18,016	2.21	0.92	0.23	1.74	1.34	1.13	2.90	0.49	0.98	1.97	0.36	0.22	1.27	1.19	1.01	0.34	1.00
Hopkins	17,591	2.57	0.55	0.54	0.64	0.93	3.69		0.14	0.14	2.31	1.46	2.26		1.18	1.96	1.36	1.06
Anoka	17,142	1.27	0.41			0.60	1.43	0.85	1.00	0.28		2.23	0.26		1.09	1.13	1.47	0.54
Red Wing	16,459	1.61	0.80	0.10	2.30	1.16	0.64	1.08	0.36	0.55	2.61	1.63	0.23	1.62	1.19	1.27	1.15	1.20
St Michael	16,399		0.13		0.95	0.77		0.93	0.04	0.12		3.26	0.40		0.37	0.39	0.06	0.40
Hibbing	16,361	0.62	0.40		2.16	0.94	1.07	2.18	0.24	0.72	2.30	0.82	0.32	0.48	0.84	0.90	0.25	0.90
Sartell	15,876					1.37	1.24	0.48				17.57	1.07		0.56	0.32	0.41	0.84
Buffalo	15,453	1.52	0.04	0.11	2.82	1.44		0.86	0.21	0.24	3.28	0.69	0.52		1.00	0.98	1.28	1.08
Unadjusted Average: *		1.62	0.69	0.71	1.77	0.99	1.26	1.35	0.39	0.41	2.13	2.41	0.65	1.06	1.01	1.28	0.73	0.81

* 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 14,300 & 21,600 (Range: Population of Stillwater +/- ~ 20%.) (21 Cities)

Rankings

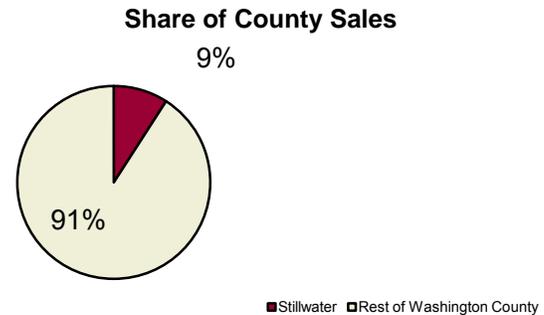
Town	Population	Vehicles, Parts	Furniture Stores	Elec- tronics	Building Materials	Food	Health, Personal	Gasoline Stations	Apparel	Leisure Goods	General Merch.	Misc.	Amuse- ment	Lodging	Eating & Drinking	Repair, Maint.	Personal Services	Taxable \$ Pull Factor
Town name																		
New Brighton	# 1	# 16	# 7			# 16	# 14	# 9	# 15	# 16		# 14	# 10		# 15	# 16	# 15	# 20
Farmington	# 2				# 9	# 17		# 10	# 12	# 19		# 20	# 15		# 20	# 18	# 10	# 19
Golden Valley	# 3	# 1	# 2	# 2	# 5	# 9	# 9	# 11	# 5	# 4		# 16	# 2	# 5	# 1	# 1	# 5	# 2
New Hope	# 4	# 15	# 13	# 3	# 14	# 20	# 3	# 16	# 19	# 18		# 12			# 14	# 9	# 2	# 18
Lino Lakes	# 5	# 2			# 13	# 19			# 1	# 12		# 3	# 16		# 19	# 17	# 18	# 14
Northfield	# 6	# 13	# 12			# 11	# 11	# 7	# 13	# 13		# 4	# 9	# 8	# 11	# 11	# 14	# 13
Willmar	# 7	# 5	# 1	# 1	# 1	# 2	# 5	# 6	# 3	# 3	# 3	# 8	# 11	# 1	# 7	# 4	# 11	# 1
West St Paul	# 8	# 9	# 10	# 5	# 3	# 4	# 2	# 12	# 4	# 5	# 2	# 7	# 5		# 2	# 12	# 8	# 3
South St Paul	# 9	# 6				# 18		# 4	# 18	# 1		# 13	# 6		# 17	# 2	# 17	# 15
Columbia Heights	# 10	# 12	# 4		# 15	# 10		# 2	# 7	# 17	# 9	# 18	# 19		# 13	# 5	# 19	# 17
Forest Lake	# 11	# 10	# 15	# 7	# 2	# 3	# 8	# 5	# 16	# 7		# 2	# 7	# 7	# 4	# 8	# 9	# 4
Stillwater	# 12	# 17	# 11	# 8	# 11	# 1	# 13	# 17	# 9	# 9	# 8	# 6	# 3	# 4	# 3	# 7	# 1	# 10
Albert Lea	# 13	# 4	# 3	# 6	# 8	# 7	# 7	# 1	# 6	# 2	# 7	# 19	# 18	# 3	# 6	# 13	# 13	# 8
Hopkins	# 14	# 3	# 6	# 4	# 12	# 13	# 1		# 14	# 14	# 5	# 11	# 1		# 8	# 3	# 4	# 7
Anoka	# 15	# 11	# 8			# 15	# 4	# 15	# 2	# 10		# 9	# 14		# 9	# 10	# 3	# 12
Red Wing	# 16	# 7	# 5	# 10	# 6	# 8	# 12	# 8	# 8	# 8	# 4	# 10	# 17	# 2	# 5	# 6	# 7	# 5
St Michael	# 17		# 14		# 10	# 14		# 13	# 17	# 15		# 5	# 12		# 18	# 19	# 20	# 16
Hibbing	# 18	# 14	# 9		# 7	# 12	# 10	# 3	# 10	# 6	# 6	# 15	# 13	# 6	# 12	# 15	# 16	# 9
Sartell	# 19					# 6	# 6	# 18				# 1	# 4		# 16	# 20	# 12	# 11
Buffalo	# 20	# 8	# 16	# 9	# 4	# 5		# 14	# 11	# 11	# 1	# 17	# 8		# 10	# 14	# 6	# 6

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.

Stillwater & Washington 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 Stillwater and Washington County in 2010. Stillwater accounted for 12 percent of the county's firms and 9 percent of the county's sales.



Sales by Merchandise Category, Stillwater & Washington County, 2010

Merchandise Category	Stillwater		Washington County		City's Share of County Total	
	Taxable Sales (\$millions)	Number of Firms	Taxable Sales (\$millions)	Number of Firms	Sales	Firms
Vehicles & Parts	\$1.87	7	\$55.48	87	3.4%	8.0%
Furniture Stores	\$1.30	19	\$55.40	99	2.3%	19.2%
Electronics	\$0.79	6	\$61.48	51	1.3%	11.8%
Building Materials	\$10.88	7	\$243.11	62	4.5%	11.3%
Food, Groceries	\$21.55	14	\$137.05	123	15.7%	11.4%
Health, Personal Stores	\$0.85	5	\$26.82	58	3.2%	8.6%
Gasoline Stations	\$2.57	7	\$31.99	62	8.0%	11.3%
Apparel	\$0.92	18	\$40.23	158	2.3%	11.4%
Leisure Goods	\$1.31	16	\$64.53	160	2.0%	10.0%
General Merchandise	\$28.83	6	\$272.20	30	10.6%	20.0%
Miscellaneous Retail	\$15.09	76	\$69.34	497	21.8%	15.3%
Non-Store Retailers	\$0.24	18	\$6.02	227	3.9%	7.9%
Amusement & Recreation	\$6.60	10	\$63.73	103	10.4%	9.7%
Accommodations	\$4.50	14	\$25.18	48	17.9%	29.2%
Eating & Drinking Places	\$33.47	58	\$264.39	396	12.7%	14.6%
Repair, Maintenance	\$4.57	24	\$31.28	246	14.6%	9.8%
Personal Service, Laundry	\$4.28	49	\$23.50	313	18.2%	15.7%
Total Sales*	\$144.69	506	\$1,590.71	4,338	9.1%	11.7%

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	Stillwater
RETAIL TRADE					
441 Vehicles, Parts	1,791	1,404	\$354.67	\$343.35	\$104.41
442 Furniture Stores	2,359	2,719	\$222.17	\$155.34	\$72.26
443 Electronics	2,949	3,879	\$324.51	\$138.07	\$43.88
444 Building Materials	2,146	1,636	\$821.91	\$864.05	\$605.92
445 Food and Beverage Stores	1,478	1,324	\$577.29	\$489.86	\$1,200.60
446 Health, Personal Stores	3,050	3,585	\$110.59	\$62.66	\$47.18
447 Gasoline Stations	2,357	1,857	\$174.64	\$205.85	\$143.07
448 Clothing & Accessory Stores	1,361	1,759	\$170.58	\$81.05	\$51.44
451 Leisure Goods	1,211	1,164	\$241.49	\$159.78	\$73.14
452 General Merchandise	4,650	3,704	\$1,020.65	\$1,050.20	\$1,606.13
453 Miscellaneous Merchandise	364	347	\$296.71	\$225.82	\$840.39
454 Non-store Retail	772	880	\$270.53	\$74.26	\$13.20
Retail Total			\$4,585.73	\$3,850.29	\$4,801.62
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	\$229.68
722 Food Services, Drinking Places	465	451	\$1,280.87	\$954.35	\$1,903.09
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	