City of Ramsey
Agenda

Economic Development Authority (EDA)

Thursday, December 14, 2017
7:30 am
Lake Itasca Room, 7550 Sunwood Drive NW

1. Call to Order

2. Approve Agenda

3. Approve Minutes

1. Approve the Following Meeting Minutes:
1) EDA Regular Meeting - October 12, 2017

2. Approve the Following Meeting Minutes:
1) EDA Regular Meeting - November 9, 2017

4. EDA Business

1. Rum River Hills Development Proposal

2. Review Draft Economic Development Chapter of Comprehensive Plan

3. CBRE: Updates and Pricing Strategy (portions of this case may be closed to the public)

4. Buxton Group Opportunity

5. Member/Staff Input

6. Adjournment

Economic Development Authority (EDA) **3. 1.**

Meeting Date: 12/14/2017

By: Katie Schmidt, Administrative Services

Title:

Approve the Following Meeting Minutes:
1) EDA Regular Meeting - October 12, 2017

Purpose/Background:

Purpose: The purpose is to approve the meeting minutes for the EDA meeting held the prior month.

Background: The meeting minutes are attached for review and approval.

Notification:

Observations/Alternatives:

Funding Source:

Recommendation:

Action:

Motion to approve the following EDA meeting minutes:

1) EDA Regular Meeting - October 12, 2017

Attachments

Minutes 10-12-17

Form Review

Inbox	Reviewed By	Date
Patrick Brama	Patrick Brama	12/05/2017 12:53 PM
Kurt Ulrich	Kurt Ulrich	12/07/2017 11:16 AM
Form Started By: Katie Schmidt		Started On: 11/29/2017 12:35 PM
Final Approval Date: 12/07/2017		

ECONOMIC DEVELOPMENT AUTHORITY
CITY OF RAMSEY
ANOKA COUNTY
STATE OF MINNESOTA

The City of Ramsey Economic Development Authority (EDA) conducted a regular meeting on Thursday, October 12, 2017, at the Ramsey Municipal Center, 7550 Sunwood Drive NW, Ramsey, Minnesota.

Members Present:	Chairperson Jim Steffen Member Glen Hardin Member John LeTourneau Member Chris Riley Member Wayne Skaff
Members Absent:	Member Brian Burandt
Also Present:	Patrick Brama, Econ. Dev. Mgr./Assistant City Administrator Kurt Ulrich, City Administrator

1. CALL TO ORDER

Chairperson Steffen called the Economic Development Authority meeting to order at 7:30 a.m.

2. APPROVE AGENDA

Motion by Member Skaff, seconded by Member Hardin, to approve the agenda.

Motion carried. Voting Yes: Chairperson Steffen, Members Skaff, Hardin, LeTourneau, and Riley. Voting No: None. Absent: Member Burandt.

3. APPROVE MINUTES

3.01: Approve Meeting Minutes Dated September 14, 2017

Motion by Member Riley, seconded by Member Skaff, to approve the September 14, 2017, minutes as presented.

Motion carried. Voting Yes: Chairperson Steffen, Members Riley, Skaff, Hardin, and LeTourneau. Voting No: None. Absent: Member Burandt.

4. EDA BUSINESS

4.01: Receive Update on The COR Interim Development Plan

Economic Dev. Mgr./Assistant City Administrator Brama presented the staff report.

City Administrator Ulrich read aloud the vision statement, noting that the statement is less restrictive than it has been in the past, which provides the opportunity to be responsive to the current market and provides more flexibility.

Economic Dev. Mgr./Assistant City Administrator Brama highlighted the different subdistricts within The COR and the differences in opinion on the topic of floor area ratio. He provided additional details on the different colors used and the potential concepts. He stated that the Planning Commission recognized that the City needs to remain flexible in the northwest portion of The COR.

Chair Steffen noted that the plan should remain flexible throughout The COR to be open to market opportunities. He asked how the document would be used and who it would be shown to.

Economic Dev. Mgr./Assistant City Administrator Brama replied that the document is a roadmap for the Commissions and staff to make amendments to The COR Master Plan and zoning districts. He noted that the final formal adoption would occur through those documents.

City Administrator Ulrich stated that this will be a working plan used to review requests that come forward, as the City is still acting as developer.

Member Riley asked if the EDA still agrees with their comment on the plan or whether they would like to change that, specifically the green box on page six. He stated that there was a recent developer that came in and said that structured parking would be a deal killer. He stated that flexibility was created in the floor area ratio.

Chair Steffen asked how that would play out with the EDA and Planning Commission giving conflicting opinions.

City Administrator Ulrich stated that the Council would be the deciding body and perhaps the EDA would like to affirm their statement if that is still the position of this body.

Member Hardin stated that the theme seems to allow for different options and opportunities and therefore it does not seem to fit with the theme of the document to require a developer to include structured parking. He asked if the document would read in this manner in its final form, with the highlighted boxes or whether the form would be changed.

City Administrator Ulrich confirmed that the format would remain the same.

Member Skaff stated that he would like to reaffirm the statement of the EDA. He stated that shared parking works and if his church was forced to build structured parking they would not have been able to be located in that space. He stated that it has been a great success between the church, PACT, and Allina to share parking without the expense of structured parking.

Chair Steffen agreed to confirm that statement. He asked when the comment period would be ending.

Economic Dev. Mgr./Assistant City Administrator Brama reviewed the timeline, noting spring 2018 would be the end of the comment period when the document will return to the City Council.

Chair Steffen stated that he would be curious to hear a summary of the public input.

Member Hardin stated that the document has a lot of "City speak" and was unsure that the public would be able to follow some of the language.

City Administrator Ulrich noted that did come up at the Council level and noted that staff would repackage the language for presentation to the public to make the document and intent more user friendly.

Member Hardin stated that he has made some grammatic comments that he will provide to staff.

Motion by Member Skaff, seconded by Member Hardin, to reaffirm the previous EDA statement regarding The COR Interim Development Plan.

Motion carried. Voting Yes: Chairperson Steffen, Members Skaff, Hardin, LeTourneau, and Riley. Voting No: None. Absent: Member Burandt.

4.02: 2017 EDA Business Networking Event Update

Economic Dev. Mgr./Assistant City Administrator Brama presented the staff report.

Chair Steffen asked for details on the development update.

Economic Dev. Mgr./Assistant City Administrator Brama stated that the presentation would be a mix between himself, City Administrator Ulrich, and Community Development Director Gladhill and would focus on highlight updates.

5. MEMBER / STAFF UPDATE

The EDA reviewed the Staff Update. He provided updates on recent marking for development, and the Sunfish Lake gas station demolition. He provided information on an upcoming case for the EDA. He provided an update on the resilient communities program that the City has partnered with the University of Minnesota on. He stated that staff continues to work on shovel ready certifications and identified prospects within the City for development. He stated that this is the highest level of prospects that the City has ever seen, which is a good indication that the City is heading in the right direction. He highlighted some of the concerns that staff continues to hear regarding demographics. He noted that staff is concerned that there is a lag in the data regarding demographics and current development projects. He stated that the City previously worked with Buxton, noting that the group has approached the City once again with a desire to work together. He noted that Buxton has a new approach and product model. He asked if the EDA would have interest in providing Buxton with the opportunity to make a presentation to the

EDA. He stated that it is a different approach than the City has looked at in the past, noting that the City has not had overwhelming success with the other approaches and therefore believed it would be worth it to hear what they have to say.

Member Skaff stated that he heard the pitch in the past. He asked if there is a way to share the cost.

Economic Dev. Mgr./Assistant City Administrator Brama agreed that there would be value to others in the community and therefore there could be an option to share the cost. He noted that the contract time could range from one to three years.

Member Riley stated that finding out this type of information could be helpful and has been suggested by the Planning Commission in the past. He stated that although he is not certain that this is the best product. He stated that the City could buy this but retailers and developers still use their own data and therefore it could be redundant. He stated that he would be interested in hearing more but perhaps his concerns could be shared with the group prior to their presentation.

Chair Steffen stated that perhaps the deliverable from nine years ago could be dusted off to be discussed at the presentation. He asked the repeat customer range.

Economic Dev. Mgr./Assistant City Administrator Brama stated that he would prepare a good list of questions if the EDA would like to take the time to hear the presentation.

Member LeTourneau stated that the community sells itself short sometimes and believes that the City knows what is going on in the market. He stated that in instances like this perhaps the City is looking for someone to tell them what they want to hear, rather than what they already know. He stated that he is not opposed to hearing the presentation but would be skeptical. He stated that the City is emerging, but is not there yet in attracting the prospects they want to have here. He stated that this seems that the City would be spending money to hear what they already know.

Chair Steffen agreed noting that the City has seen more prospects lately than they have ever seen and are hearing the concerns from the market directly. He noted that he would be open to hearing the presentation.

City Administrator Ulrich agreed that staff could do more research. He agreed that retailers and developers are still doing their own research and is unsure that a retailer would jump on a site because Buxton says they are a good fit. He stated that perhaps $50,000 would be better spent on the City doing its own research or on a restaurant incentive program.

City Administrator Ulrich noted that there will be a special election for former Councilmember on April 10, 2018. He stated that Member LeTourneau was the designated alternate and a formal designation will soon go before the Council to make Member LeTourneau the formal Member with a new alternate. He stated that the date has been extended to accept applications for the current vacant position on the EDA and noted that the Council will conduct interviews on October 24th. He stated that the City held a tour with the Metropolitan Council on Tuesday night.

Member Skaff stated that he spoke with two of the representatives from the Met Council who were happy to be a part of the tour.

Member Hardin stated that each one of the staff members that spoke did a great job. He commended staff for their planning of the event.

Chair Steffen advised of a new business that will be coming to The COR, My Computer Hero, was a homebased business, and is operated by two Ramsey residents. He encouraged members of the EDA to stop in and share their support.

Economic Dev. Mgr./Assistant City Administrator Brama stated that will fill the last vacancy in that retail node.

6. ADJOURNMENT

The regular meeting of the Economic Development Authority adjourned at 8:27 a.m.

Respectfully submitted,

_____
Kurtis G. Ulrich
City Administrator

ATTEST:

_____
Patrick Brama
Econ. Dev. Mgr/Assistant City Administrator

Draft by Amanda Staple
TimeSaver Off Site Secretarial, Inc.

Economic Development Authority (EDA) **3. 2.**

Meeting Date: 12/14/2017

By: Katie Schmidt, Administrative Services

Title:

Approve the Following Meeting Minutes:
1) EDA Regular Meeting - November 9, 2017

Purpose/Background:

Purpose: The purpose is to approve the meeting minutes for the EDA meeting held the prior month.

Background: The meeting minutes are attached for review and approval.

Notification:

Observations/Alternatives:

Funding Source:

Recommendation:

Action:

Motion to approve the following EDA meeting minutes:

1) EDA Regular Meeting - November 9, 2017

Attachments

11-9-2017 Minutes

Form Review

Inbox	Reviewed By	Date
Patrick Brama	Patrick Brama	12/05/2017 12:53 PM
Kurt Ulrich	Kurt Ulrich	12/07/2017 11:16 AM
Form Started By: Katie Schmidt		Started On: 11/29/2017 12:37 PM
Final Approval Date: 12/07/2017		

ECONOMIC DEVELOPMENT AUTHORITY
CITY OF RAMSEY
ANOKA COUNTY
STATE OF MINNESOTA

The City of Ramsey Economic Development Authority (EDA) conducted a regular meeting on Thursday, November 9, 2017, at the Ramsey Municipal Center, 7550 Sunwood Drive NW, Ramsey, Minnesota.

Members Present:	Chairperson Wayne Skaff Member Glen Hardin Member Chris Riley
Members Absent:	Chairperson Jim Steffen Member Brian Burandt Member John LeTourneau
Also Present:	Patrick Brama, Econ. Dev. Mgr/Assistant City Administrator Tim Gladhill, Community Development Manager Kurt Ulrich, City Administrator Kevin Kielb, Senior Project Manager at Bolton & Menk Cody Gundstenson, Buxton Jim Hornecker, Oppidan Dominic Kanaventi Brian Pankratz, CBRE

1. CALL TO ORDER

Acting Chairperson Skaff called the Economic Development Authority meeting to order at 7:30 a.m.

It was noted that the EDA did not have a quorum present and therefore would not take formal action today but would still move forward with the discussion items.

2. APPROVE AGENDA

The agenda was approved as presented.

3. APPROVE MINUTES

3.01: Approve Meeting Minutes Dated October 12, 2017

This item will be considered at the next meeting.

4. EDA BUSINESS

4.01: Preliminary Deal Structure: Case of National Auto Body and Glass User

Economic Dev. Mgr/Assistant City Administrator Brama presented the staff report.

Jim Hornecker provided background information on Oppidan noting that the company is primarily a retail developer, providing examples of clients that the company works with nationwide. He stated that Oppidan is a national company, primarily based between Minnesota and California. He stated that the user has identified a gap in their network and believe Ramsey to be a good location for their business. He stated that this is a four-acre parcel, but the user would only need a building size of 18,000 square feet on the western half of the site, which means that the eastern portion of the site would be preserved for future development.

Acting Chairperson Skaff asked if the business would be open six days per week or seven days per week.

Mr. Hornecker replied that the business would be open six days per week.

Acting Chairperson Skaff asked if there would be any impact with the future overpass of the railroad crossing.

Community Development Director Gladhill replied that once staff receives renderings they would be able to better gauge.

Member Hardin asked for input on how the building would face.

Mr. Hornecker provided details on how the building would be faced.

Member Riley stated that Oppidan seems to be a great developer for Ramsey and the site seems to be a good fit for the user.

Economic Dev. Mgr./Assistant City Administrator Brama stated that staff would continue discussions about the remnant parcel and the City's policies for remnant lots.

Member Riley stated that he likes the proposal for the commission.

Acting Chairperson Skaff stated that he would also like to see this item move forward and confirmed the consensus of the members present.

4.02: Preliminary Deal Structure: Case of Paxmar

Economic Dev. Mgr/Assistant City Administrator Brama presented the staff report.

Member Hardin asked if the cost-share for the road would be the typical cost-share.

Economic Dev. Mgr./Assistant City Administrator Brama noted that is a future item outside of this potential purchase agreement as that would be done through the entitlement process.

Acting Chairperson Skaff stated that this seems to make sense and the details will come forward the following month.

Member Riley agreed that this seems to make sense, as this would simply be the other side of the parcel.

4.03: Public Infrastructure Feasibility Study for The COR

Economic Dev. Mgr/Assistant City Administrator Brama presented the staff report.

Kevin Kielb displayed the Center Street area analysis, noting that this not only looks at the individual parcels but at the area as a whole. He explained that The COR has been developed from the outside in, and therefore the study will provide staff with something they can use to talk with developers about. He stated that this would give the City a level of confidence that they will not be selling themselves short when the parcels are developed. He stated that developers would see this as a benefit as there will not be surprises with the road costs and development expectations. He appreciated the cooperation of staff, noting that staff had to pull together all the record drawings and as-builts in order for this company to use those elements in the study. He hoped to have a report done for the Center Street portion by the end of the month and the remaining portion of The COR by the end of the year.

Member Riley stated that someone originally planned where elements are already and asked how things already built interacts with this study and specifically whether this should be the last time the City has to plan things.

Mr. Kielb replied that this should be the last time this planning needs to occur. He explained that this portion of the planning would in essence be the third dimension of the plan that looks at road interaction and drainage. He explained that development has been pieced together and slowed down during the recession, but now that development is increasing again, this should be the last look to ensure that everything fits together.

Economic Dev. Mgr./Assistant City Administrator Brama stated that the Master Plan for The COR has evolved over time, noting that everything needs to be up to date and up to speed before the last phase of infrastructure for The COR is implemented. He noted that there are many inconsistencies.

Member Riley asked the scope of the study.

Economic Dev. Mgr./Assistant City Administrator Brama confirmed that this study would include public infrastructure elements including roads, sidewalks, and drainage.

Member Hardin stated that he was glad to see that the cost estimates were included and hoped those elements would be as accurate as possible.

Acting Chairperson Skaff confirmed the consensus of the EDA to authorize the Bolton & Menk Work Order, not to exceed $25,384 to complete concept designs and feasibility reports for all remaining public infrastructure needed in The COR.

4.04: Buxton Group, Review Available Services

Economic Dev. Mgr/Assistant City Administrator Brama presented the staff report.

Cody Gundstenson stated that he met with staff about one month ago and had some discussion with the City's challenges for retail development. He stated that he would like to highlight some of the new products and benefits that Buxton has gained since the group last crossed paths with the City ten years ago. He stated that Buxton comes from the retail world and has partnered with over 5,000 concepts, helping those companies grow their brand by adding new locations. He stated that within the private sector Buxton helps to create a data consumer driven story. He noted that Buxton has also partnered with 800 municipalities and provided examples of municipalities that have recently partnered with Buxton in the past five years that received a beneficial return on investment. He provided details on the retail recruitment and business retention element of the Buxton plan. He noted that they would not want to bring in new business that would harm the existing businesses. He stated that the first step in recruiting retail is to get beyond the demographics. He explained that Buxton provides a consumer driven approach, which is what a retailer wants to see, as demographics are only a small portion of the pie. He stated that retailers want to know where their core customers are working and living and that is why Buxton leads with a consumer driven story.

He provided details on where Buxton gathers their data on consumers, noting that they have a very unique partnership with the largest credit card provider in the world. He stated that he can then look at the household data to determine which brands the household members are purchasing. He stated that Buxton looks beyond the political boundaries and looks instead at a drive-time trade area. He stated that typically you would look at a ten to 15-minute trade area and provided a map of this area. He stated that Buxton can quantify the demographics and then take it several steps forward with the consumer driven story. He stated that Buxton would use the consumer profile added with the drive-time trade area and the retail market conditions to identify the strongest retail matches.

He stated that in the past Buxton provided a much larger list of possible retailers, but has found instead that it benefits to focus on a smaller list of about 20 retailers that would be the best fit the community, fit the long-term strategy, and also fit the checklist for the individual retailer. He stated that a huge difference from the past partnership is that Buxton now has an implementation piece of the partnership. He stated that once the list of retailers is developed, Buxton would send out targeted information to the retailer, written in the retailer format. He stated that the Buxton names goes a long way in the retail world and with Buxton starting the outreach process, that shows the retailer that the City is retail friendly. He stated that this information helps retailers see similar markets where the retailer has been successful and that they can be successful in the Ramsey market. He stated that Ramsey would receive an outreach team of four to five individuals that would do the upfront data collection work and then begin the initial outreach process. He stated that the outreach team would then facilitate conversations and in-person site

visits with Ramsey staff members. He noted that the most successful clients lean on the outreach team to the fullest, including the conference calls and on-site visits. He stated that a huge component of what they do is business retention as well; capitalizing on how new foot traffic could also benefit the existing businesses. He stated that they would provide the existing retail businesses with a competitive advantage with on-demand trade area reports and market intelligence specific to each business, which helps keep local dollars local. He stated that the application is included in the package and is called LSMX, which helps local businesses understand who their customers are, how to target customers, and how to market to those customers and potential customers.

Member Riley left the meeting.

Mr. Gundstenson provided information on the Scout platform that Buxton uses and the City would have available for all members of staff able to access. He thanked the EDA for their time and provided information on what the City could expect in the first 60 days of a one-year partnership. He noted that within the first 60 days Buxton would gather the data for the consumer driven story to develop the strategic list of retails and then work on implementation of that list.

Acting Chairperson Skaff stated that he was a member of the EDA ten years ago when the City partnered with Buxton and felt that the City did not get much out of it at that time, acknowledging the challenges of the recession.

Mr. Gundstenson acknowledged that in the past model some clients were successful while others were not and therefore Buxton revamped their model to provide additional support with implementation. He stated that Buxton works every day with retailers to find new locations. He stated that very different from the last partnership, Buxton will be involved in implementation, reaching out to retailers that would fit with Ramsey and marketing to those retailers. He stated that Buxton would stay involved through conference calls, in person site visits, and conference attendance on behalf of the City.

Acting Chairperson Skaff stated that there are questions from the community on the desire for an anchor, such as Target, and asked if this partnership would provide that information to share with the community.

Mr. Gundstenson stated that after completing the data collection process, perhaps it would be found that Target would not be the best for this community. He stated that perhaps the process would identify that retailer would not be the best fit and would identify a retailer that would be a better fit for the consumers in this area and spur additional foot traffic to bring in more retailers.

Acting Chairperson Skaff asked for information on the fee.

Mr. Gundstenson stated that in the past they looked at a one-year term but now model on a three-year term. He stated that within the first 60 days of year one they would do all the leg work to identify the City's grow strategy and find brands that fit within that strategy to develop the list of targeted retailers. He stated that once that list is composed, the implementation team would send

out targeted marketing materials. He stated that the subsequent years would be a refresh of those efforts, as retails brings retail. He stated that the subsequent investment is $50,000 per year. He stated that while they initially structure on a three-year agreement, there is an annual opt-out clause included.

Economic Dev. Mgr./Assistant City Administrator Brama thanked Mr. Gundstenson for coming to the meeting today. He noted that the next steps would be to bring back the notes from this discussion to the full EDA the following month for further discussion.

4.05: CBRE Real Estate Listing Contract: Amendment #3

Economic Dev. Mgr/Assistant City Administrator Brama presented the staff report. He noted that a detailed update would be provided by CBRE at the next meeting of the EDA and to the Council in December.

Member Hardin stated that he is okay with adding number to the CBRE contract. He asked if it would make sense to do an RFP for the McDonald's site, rather than just automatically adding that site to CBRE to get thoughts and ideas from other brokers.

Economic Dev. Mgr./Assistant City Administrator Brama stated that perhaps that could be discussed in a case at the December meeting. He noted that from a marketing prospective removing that site geographically might not make sense.

Member Hardin stated that it is a shovel ready site that has been off the market for some time and thinks it would be beneficial to have other input.

City Administrator Ulrich stated that CBRE has been marketing that site and has been talking to prospective clients. He stated that CBRE has been working hard and whether CBRE is listed or not, they would receive the broker's commission if they brought a deal in. He stated that if CBRE is not successful on that site, the City could look at bringing in someone else.

Acting Chairperson Skaff stated that he would be fine with allowing CBRE to handle that site and therefore perhaps this should be moved to the next meeting when more members are present.

Economic Dev. Mgr./Assistant City Administrator Brama confirmed that the EDA members present would be comfortable moving amendment #3 forward to the Council only with site #37.

4.06: 2018 Annual EDA Business Expo: Select Date

Economic Dev. Mgr./Assistant City Administrator Brama presented the staff report.

5. MEMBER / STAFF UPDATE

The EDA reviewed the Staff Update.

5.01: MNCAR/Xceligent Integrated Commercial Listings

Economic Dev. Mgr/Assistant City Administrator Brama stated that MNCAR has an online listing service available that cities can subscribe to. He noted that the cost would be $3,300 per year and advised that staff would like to subscribe to the service and link to the City's website update. He stated that this would put things out in front of staff and brokers and would be a time savings as developers would be able to access the information as well. He stated that City staff would also be able to add sites that are not listed with a broker to the City's map. He stated that there are funds available in the marketing budget.

Member Hardin asked who, on City staff, would verify the accuracy of the data.

Mr. Pankratz explained the process that a broker follows to enter in the information for parcels. He noted that brokers are then required to update the listings at a minimum of every 60 days.

Economic Dev. Mgr./Assistant City Administrator Brama stated that the data is gathered using current broker listings. He noted that City staff would then be able to submit a work order for parcels that are listed within the City that are not marketed by a broker. He noted that staff could then review that information to ensure that it is update to date.

Acting Chairperson Skaff confirmed the consensus of the EDA to move forward with this item.

City Administrator Ulrich noted that the School District referendum was passed and therefore the new elementary school site will move forward. He provided an update on recent activity, upcoming meetings, and projects.

Economic Dev. Mgr./Assistant City Administrator Brama provided an update on recent activity noting that Stonebrook closed the previous day and construction should begin today. He advised of a recent grant application submit by the City. He provided an update on the Sunfish Lake gas station site, noting that the building should be removed by the end of next week. He noted that the outside walls of the first PSD building are almost complete and the long-term lease from Adrenaline Sports has been signed.

6. ADJOURNMENT

The regular meeting of the Economic Development Authority adjourned at 9:10 a.m.

Respectfully submitted,

_____

Kurtis G. Ulrich
City Administrator

ATTEST:

_____

Patrick Brama
Econ. Dev. Mgr/Assistant City Administrator

Draft by Amanda Staple
TimeSaver Off Site Secretarial, Inc.

Economic Development Authority (EDA) **4. 1.**

Meeting Date: 12/14/2017

Submitted For: Patrick Brama, Administrative Services

By: Patrick Brama, Administrative Services

Title:

Rum River Hills Development Proposal

Purpose/Background:

PURPOSE

General/ initial feedback on the proposal (identify any red flags, major concerns, major questions, etc.)?

Purpose of this case is not to formally decide anything/ approve anything. This is a concept/ preliminary proposal. The Council will use EDA feedback, when they consider this case in January. At the January Council meeting, they will give very preliminary direction to Rum River Hills, on how to move forward, through the City's various processes/ boards (what will be the required review process/ steps). Also, the Council will give preliminary feedback/ comments/ raise any red flags.

BACKGROUND

Rum River Hills is interested in a multi-party, multi-parcel, redevelopment project for their golf course. The project would require moving two of their golf holes from the east side of Highway 47 to the west side of Highway 47, onto city-owned land. The project would include a new pedestrian underpass, under Highway 47, to allow golfers access the two new golf holes. This project would require the extension of a city trunk sewer line to the area. This area is already served by a trunk city water line.

As proposed by RRH, this project would create 165 new housing units (mix of housing types). RRH believes this project will not only help revitalize their golf course, but will help revitalize the 167th/ Highway 47 Node.
**Attached is background information and context maps

COMPARING NEW REQUEST TO ORIGINAL REQUEST

Below is a quick overview, comparing the original 2013/2014 RRH's request to the current request. The City rejected the 2013/2014 request, as it was too much to consider at the time (city contribution).

	Original Request	**New Request**
Quick Silver St ($680K, 2016)	City pay 100%	City pay 50%
Hwy 47 Ped Underpass ($550K, 2016)	City pay 100%	City pay 100%
City Owned Land	City provide for free	RRH negotiate a fair market value purchase agreement
Extension of Sewer	Line not shown in Ramsey's Trunk Sewer Plan (not trunk fund eligible)	Line is shown in Ramsey's Trunk Sewer Plan (trunk fund eligible)
Zoning Amendment	Will require a zoning and comp. plan amendment.	Will require a zoning and comp. plan amendment.

This case was reviewed last by the City Council in February of 2017. At that time, staff was asked to continue working with RRH on this project. Since February 2017, this project has been put on hold--RRH wanted to wait for the City's new Trunk Sewer Plan to be adopted (which now includes a trunk sewer line running up to the 167th/ Hwy 47 node). In November of 2017, the Trunk Sewer Plan was updated and adopted. Hence, the RRH project is now back before the City.
**Attached is a process outline

Notification:

Observations/Alternatives:

Attached to this case are questions, with answers from Rum River Hills, asked by staff/ policy makers/ the public regarding this project over the years.

Funding Source:

Recommendation:

Assuming the EDA/ Council still have interest in further pursing this project, staff would make the following recommendations, from an EDA perspective.

(1) Proof of Real Market Interest.

Staff would suggest RRH bring a developer to the table based on the currently proposed deal. Staff want's to know if this proposal is "real" and that a developer and/or equity investor is legitimately interested. Staff is concerned, even if the City was able to provide assistance as requested, the project still won't move forward. Staff wants to avoid wasting the City's time and resources. Staff would recommend RRH provide a cover letter from the proposed developer/ financing agency involved--indicating they have genuine interest/ ability to work on this project. Staff would connect with said developer/ financing agency to verify.

(2) Ensure Viability of RRH

The City may also want to consider requiring Rum River Hills to open their financials for review. Although Rum River Hills won't be the primary developer on this project, Rum River Hills will be directly involved, and will have a major stake in the success of the project. Staff would suggest this review be done confidentially, by a third party.

(3) Big Picture Benefit for Community

Staff would also note, we are concerned about equitable treatment to the City's two different golf courses. If we move forward with this project, the City assistance proposed should have clear community benefits (i..e. safe pedestrian connections across 47 via a second pedestrian underpass, new road entrance to Elmcrest Park, revitalization of the 167/47 Node, and beyond, etc.). If the Council in not comfortable with how this project shows up from an equity perspective, it would be helpful to hear that now.

(4) Cost-Benefit Analysis for the City

The payback period for this project is unclear at this point. If sewer is not considered City assistance, the payback may be reasonable. If the Council wanted to further investigate this project, staff would suggest providing direction to further refine the City's proposed payback (i.e. cost-benefit). Staff would recommend working with Ehler's to put this together.

(5) Identify/ Confirm City Funding Ability

As proposed by RRH, the City would need to come up with funding for various assistance requests ($1,230,000 at this point). Because the City has already committed our traditional economic development funding sources for the foreseeable future (ACHRA and EDA Fund), we will have to look elsewhere for funding this project. This may or may not be a problem. Staff would suggest this item be further investigated as well.

(6) Performance Requirements

These assistance requests are being made by RRH based on how this project will help the 167/47 Node. Staff feels it's appropriate to make performance requirements a part of this project. Meaning, the developer must deliver XYZ by ABC date in order to receive City assistance. If the developer doesn't perform, what penalties/

claw-backs should exist? Staff wants to avoid this item being an afterthought by a developer, and come up at the end of the negotiation process--then the developer feeling upset the city is not being reasonable. Staff thinks the City's expectations should be set upfront. Staff would also ask for direction to develop a recommendation on this item.

(7) Get the Deal on Paper

Staff would suggest the Council provide general direction to negotiate a *'draft version'* of a formal purchase agreement. Depending on where we settle, this too will effect staff's recommendation on this project. At this point, Rum River Hills is informally offering about 30K per usable acre, and about $7,500 per acre for non-buildable land. From a very preliminary perspective, this seems like a reasonable deal for the city, based on the land transaction only. However, until we review an actual agreement, we are only speculating. The PA would also cover other important items (proposed cost-share agreements, performance requirements, infrastructure improvements, etc.). A draft PA will help everyone involved with this project better track, within one document, what the deal looks like.

Action:

Provide recommendations for the City Council:

1. What do you think of the project? What are your thoughts?
2. Should the Council/ staff continue to pursue?
3. Do you support staff's recommendations/ do you have changes?

Attachments

Background Info and Maps

Proposal

Process

FAQs

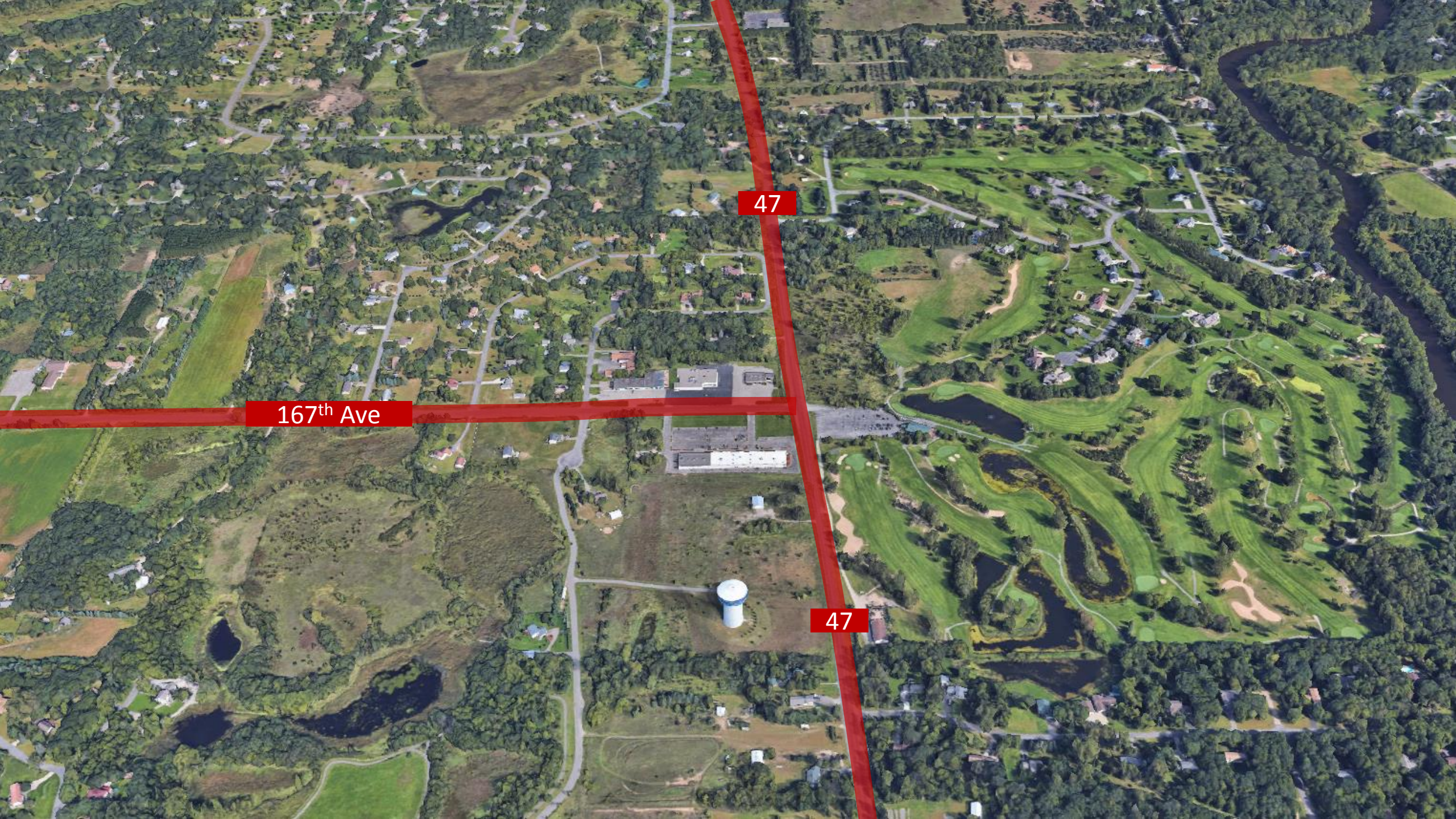
Form Review

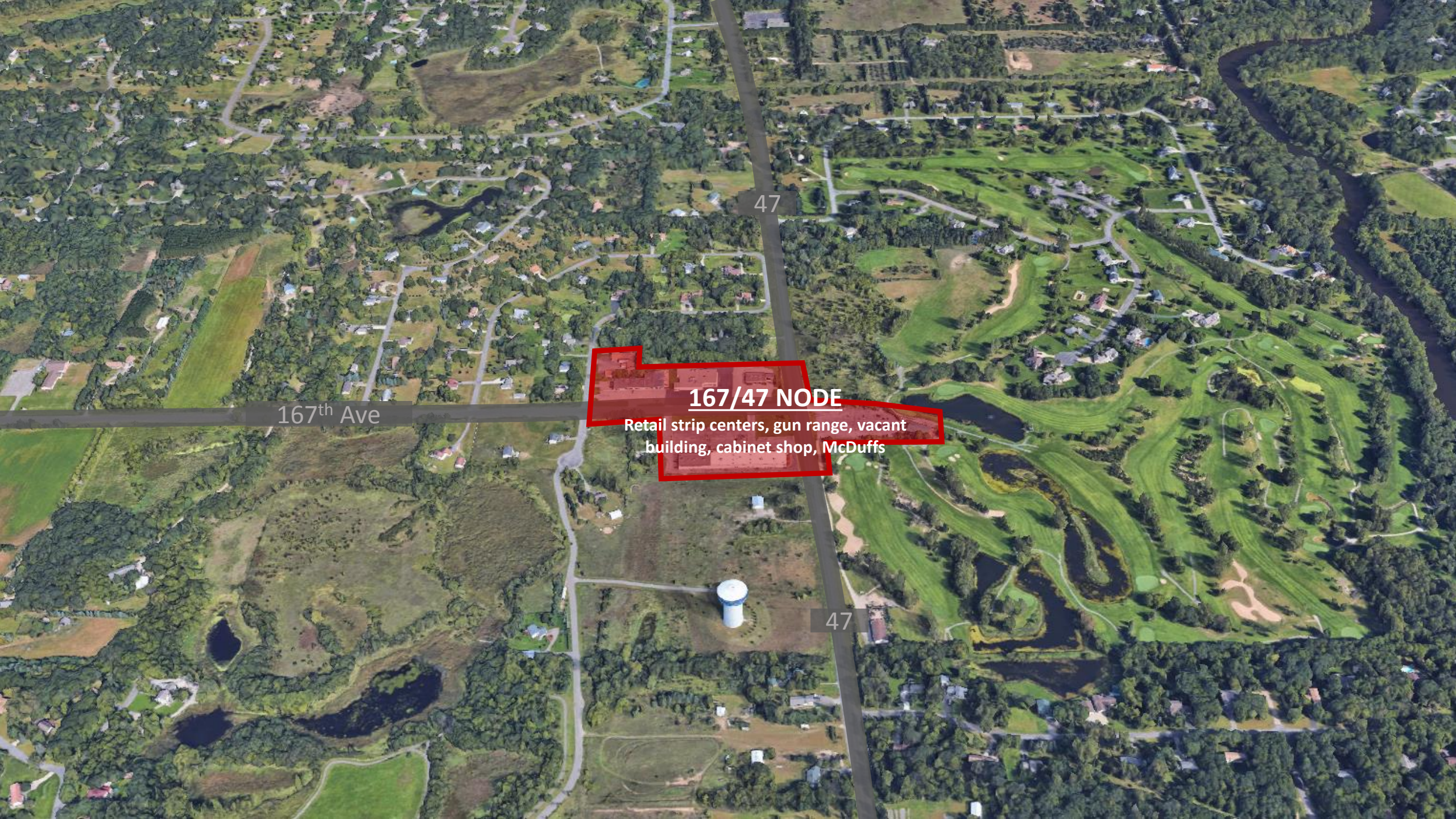
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Kurt Ulrich	Kurt Ulrich	12/07/2017 11:16 AM
Form Started By: Patrick Brama		Started On: 11/16/2017 04:44 PM
Final Approval Date: 12/07/2017		



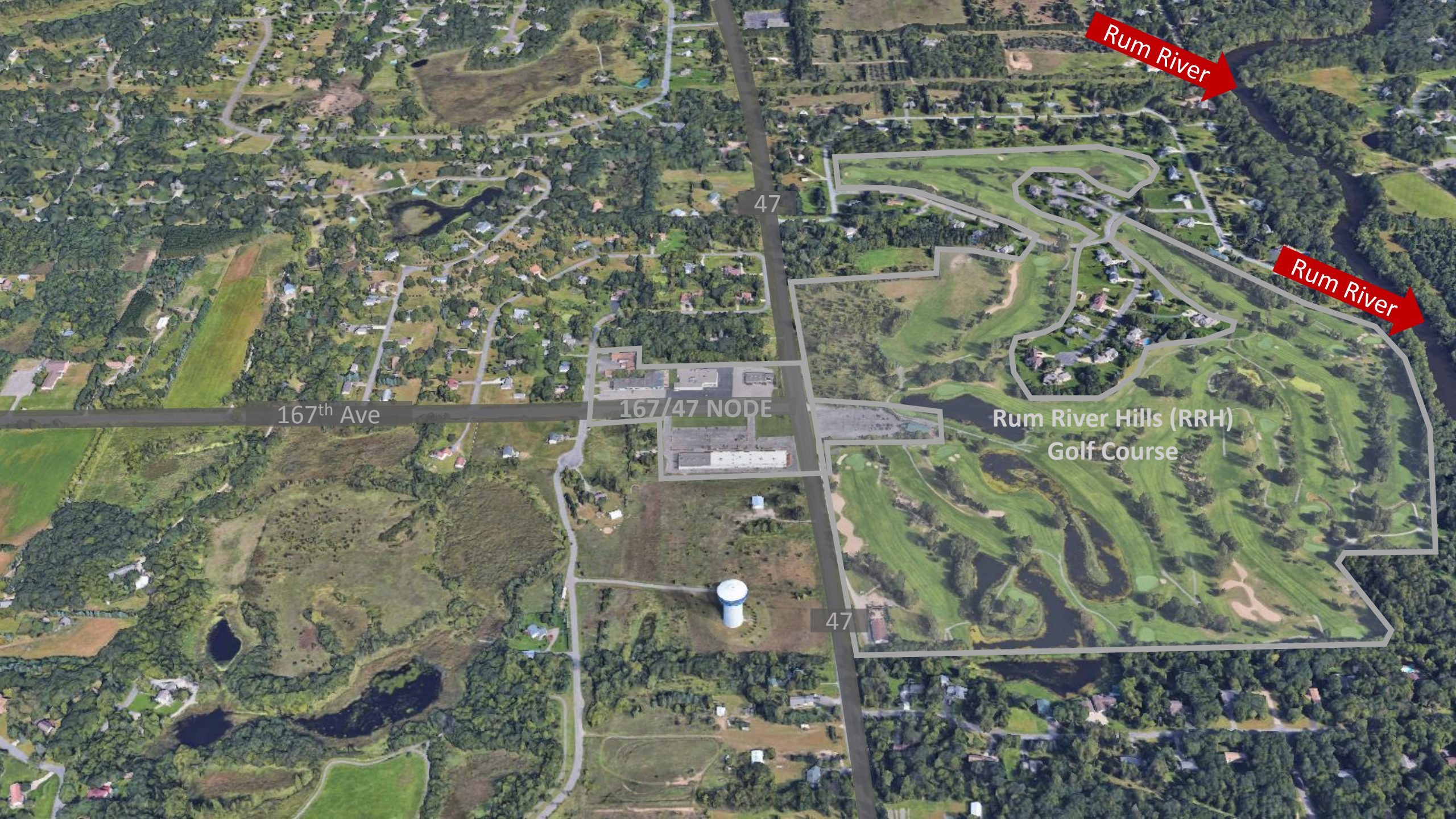
Rum River Hills (RRH) Development Proposal

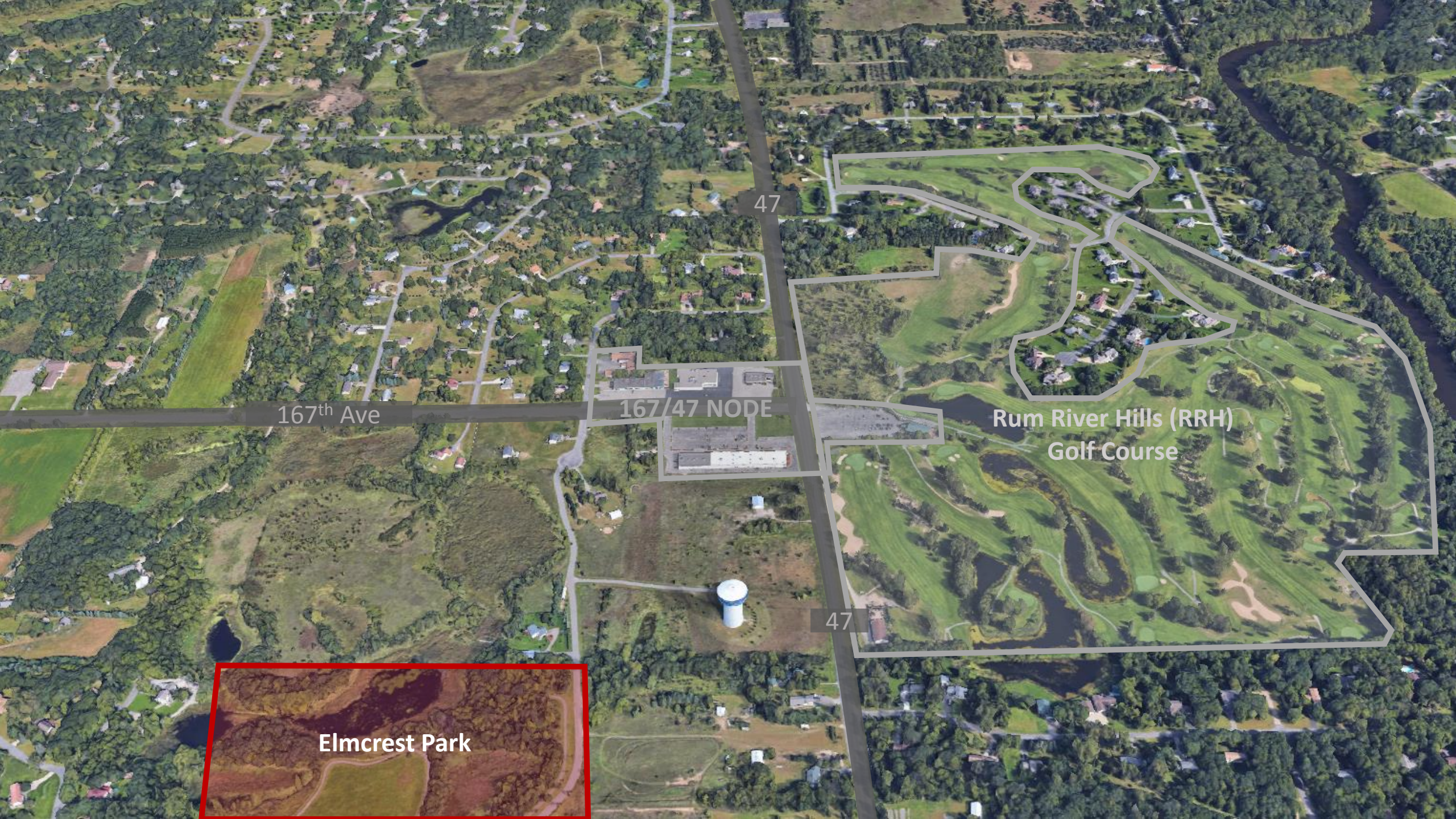

Context Maps


47
167th Ave
47


47
167/47 NODE
Retail strip centers, gun range, vacant building, cabinet shop, McDuffs
167th Ave
47


47
167th Ave
167/47 NODE
Rum River Hills (RRH)
Golf Course
47

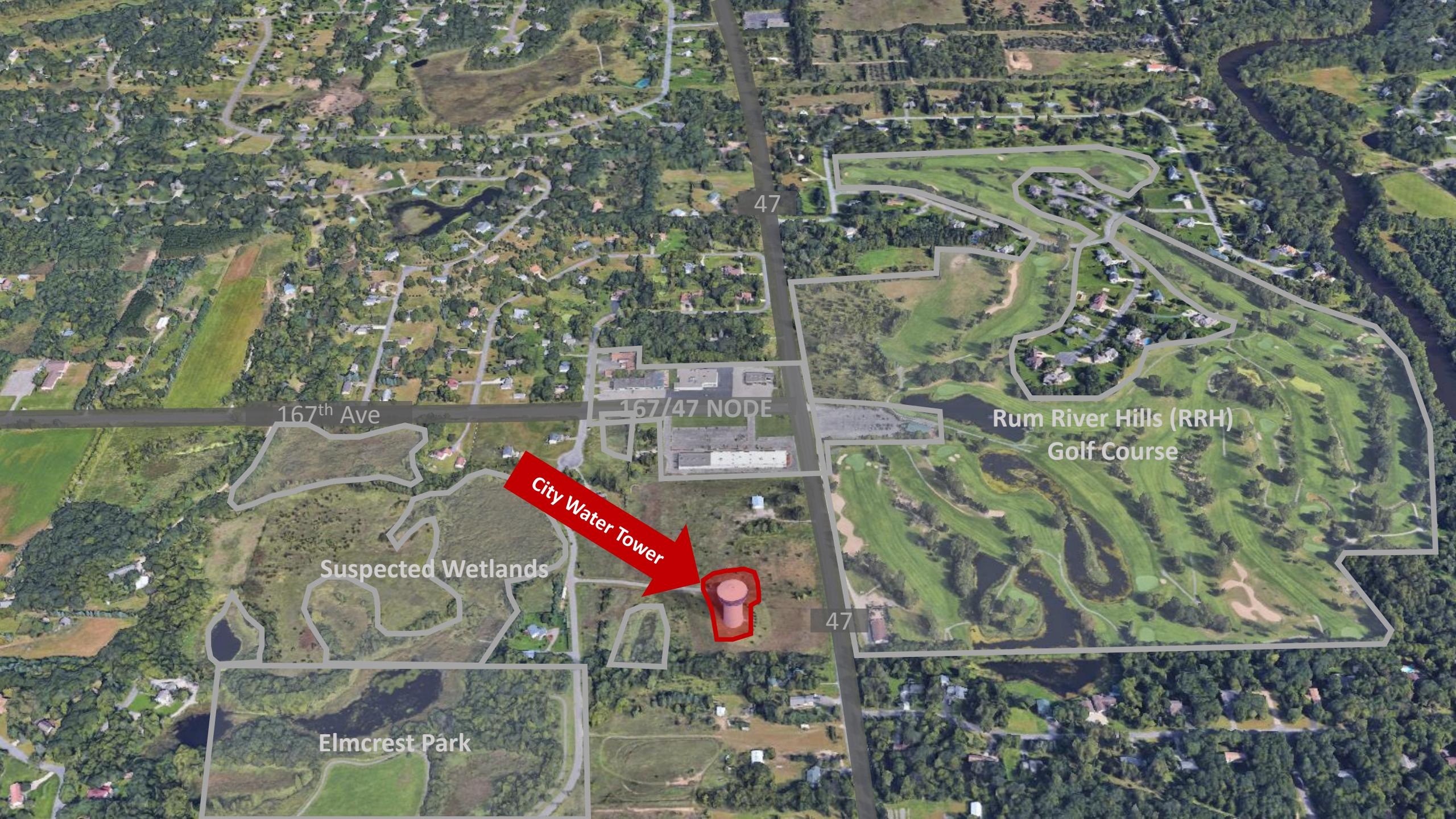

Rum River
47
Rum River
167th Ave
167/47 NODE
Rum River Hills (RRH)
Golf Course
47


47
167th Ave
167/47 NODE
Rum River Hills (RRH)
Golf Course
47
Elmcrest Park


47
167th Ave
167/47 NODE
Rum River Hills (RRH)
Golf Course
Quick Silver St.
Temporary/Existing Alignment
47
Elmcrest Park


47
167th Ave
167/47 NODE
Rum River Hills (RRH)
Golf Course
Quick Silver St.
Planned Future Permanent Alignment
47
Elmcrest Park


47
167th Ave
167/47 NODE
Rum River Hills (RRH)
Golf Course
Suspected
Wetlands
47
Elmcrest Park


47
167th Ave
167/47 NODE
Rum River Hills (RRH)
Golf Course
City Water Tower
Suspected Wetlands
47
Elmcrest Park


47
167th Ave
167/47 NODE
Major Gas Line
Rum River Hills (RRH)
Golf Course
Suspected Wetlands
47
Elmcrest Park

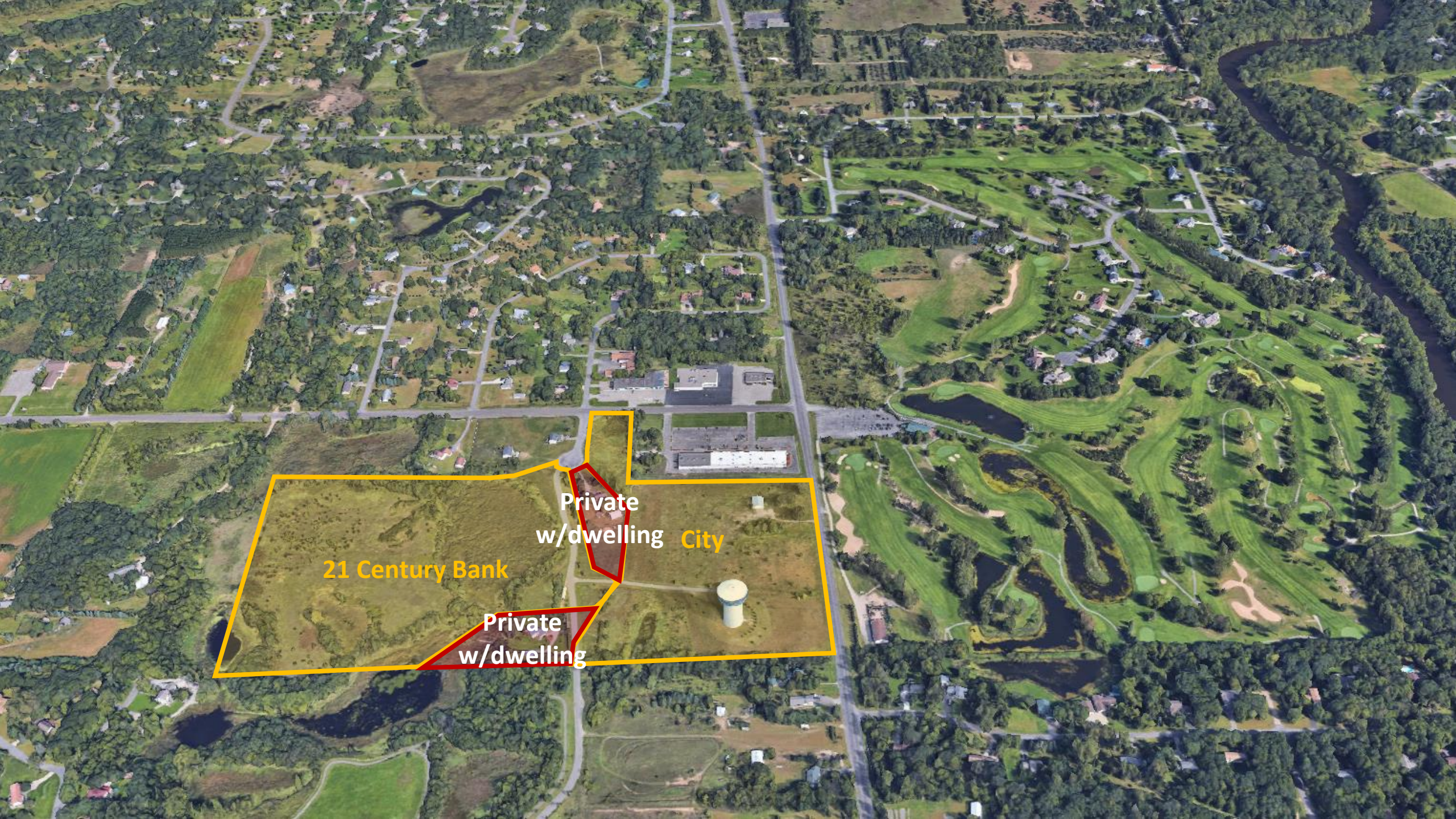

47
167th Ave
167/47 NODE
Rum River Hills (RRH)
Golf Course
Suspected Wetlands
47
Elmcrest Park



Property Ownership


21 Century Bank


21 Century Bank
City


Private
w/dwelling
City
21 Century Bank
Private
w/dwelling


Anderson
Private
City
21 Century Bank
Private


Anderson
Rum River Hills (RRH)
Golf Course
Private
City
21 Century Bank
Private


Anderson
Rum River Hills (RRH)
Golf Course
Private
City
21 Century Bank
Private



Proposed Project


RRH Proposal
Project Area (red)
Anderson
Rum River Hills (RRH)
Golf Course
Private
City
21 Century Bank
Private

Screen Shot of Proposal

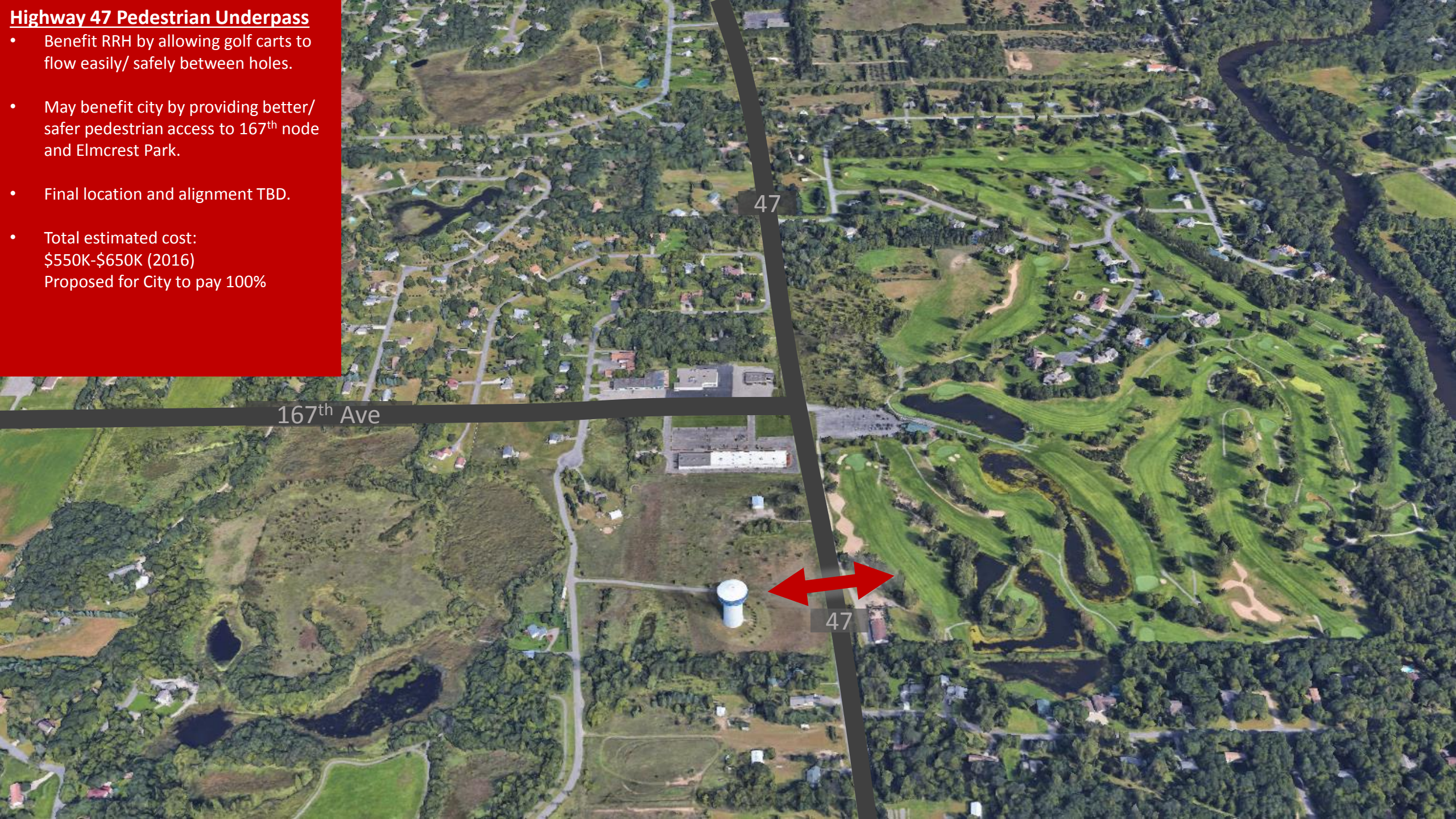


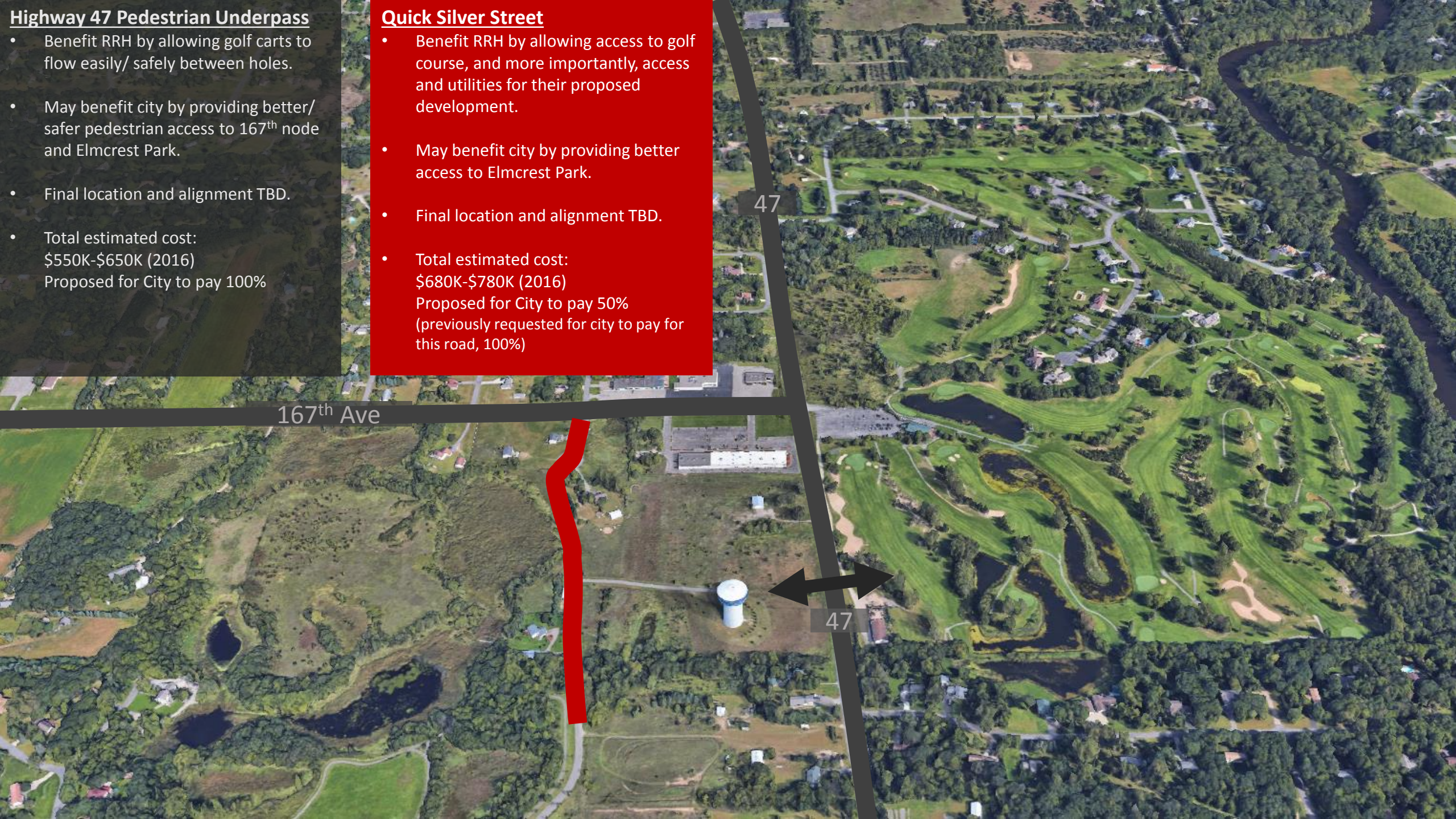


City Assistance Requests

Highway 47 Pedestrian Underpass

- Benefit RRH by allowing golf carts to flow easily/ safely between holes.
- May benefit city by providing better/ safer pedestrian access to 167th node and Elmcrest Park.
- Final location and alignment TBD.
- Total estimated cost:
  $550K-$650K (2016)
  Proposed for City to pay 100%





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- Total estimated cost:
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Quick Silver Street

- Benefit RRH by allowing access to golf course, and more importantly, access and utilities for their proposed development.
- May benefit city by providing better access to Elmcrest Park.
- Final location and alignment TBD.
- Total estimated cost:
  $680K-$780K (2016)
  Proposed for City to pay 50%
  (previously requested for city to pay for this road, 100%)

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  (previously requested for city to pay for this road, 100%)

Purchase of City Owned Land

- RRH to offer about $30,000 per usable acre. $7,500 for unbuildable property. Unbuildable property would be used for golf holes.
- This arrangement allows the city to use/ sell land that may otherwise not be usable. Example issues are major gas line that bisects property, and water tower fall area.
- Total estimated sale price:
  $200K-350K
  (previously requested for city to provide land for free, 100%)



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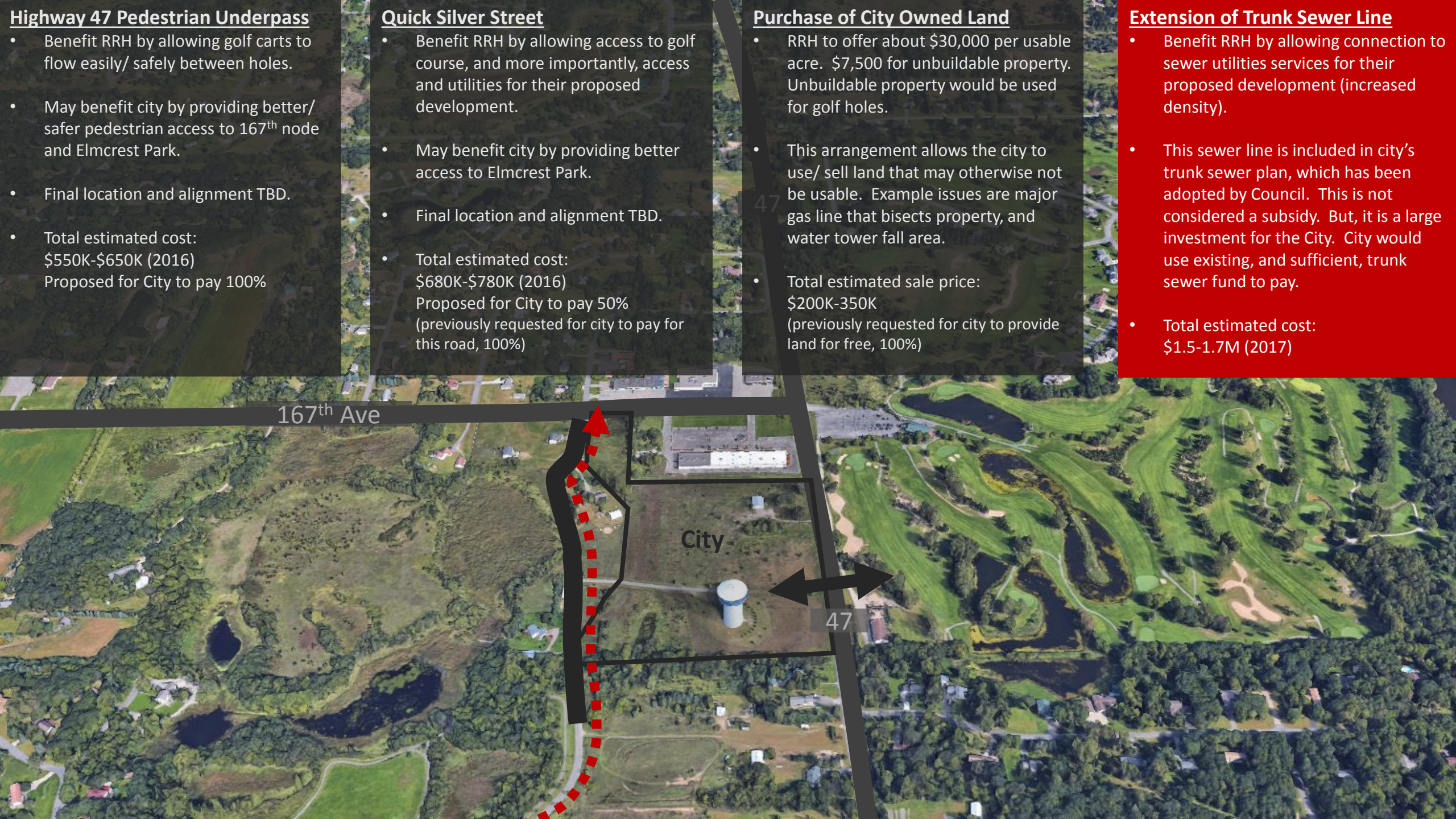
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- Total estimated sale price:
  $200K-350K
  (previously requested for city to provide land for free, 100%)

Extension of Trunk Sewer Line

- Benefit RRH by allowing connection to sewer utilities services for their proposed development (increased density).
- This sewer line is included in city's trunk sewer plan, which has been adopted by Council. This is not considered a subsidy. But, it is a large investment for the City. City would use existing, and sufficient, trunk sewer fund to pay.
- Total estimated cost:
  $1.5-1.7M (2017)





City Assistance Request Summary

Highway 47 Pedestrian Underpass

Total estimated cost:
$550K-$650K (2016)
Proposed for City to pay 100%

Quick Silver Street

Total estimated cost:
$680K-$780K (2016)
Proposed for City to pay 50%
(previously requested for city to pay 100%)

Purchase of City Owned Land

Total estimated sale price:
$200K-350K
(previously requested for free, 100%)

Extension of Trunk Sewer Line

Total estimated cost:
$1.5-1.7M (2017)

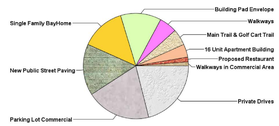
Site Plan Study

Rum River Hills Golf Community

Legend:

Total Single Family Lots (incl. 1 exist. lot)	46
Total Single Family BayHomes	71
Total Apartment/Condo Units	48
Total Units Proposed	165

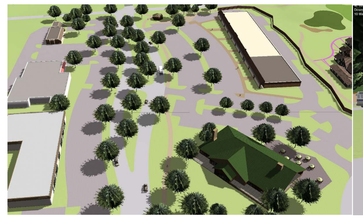
Area Chart



Total Area: 1,006,532 ft² (23.1068 acres)

Walkways in Commercial Area.	1.2%	12,513 ft²	(0.2873 acres)
Proposed Restaurant.....	1.5%	15,000 ft²	(0.3444 acres)
16 Unit Apartment Building..	4.0%	39,768 ft²	(0.9129 acres)
Main Trail & Golf Cart Trail	5.1%	51,009 ft²	(1.1710 acres)
Walkways.....	5.4%	54,776 ft²	(1.2575 acres)
Building Pad Envelope.....	12.5%	125,934 ft²	(2.8910 acres)
Single Family BayHome.....	13.6%	136,497 ft²	(3.1335 acres)
New Public Street Paving....	15.8%	159,459 ft²	(3.6616 acres)
Parking Lot Commercial.....	15.8%	159,618 ft²	(4.5826 acres)
Private Drives.....	21.1%	212,008 ft²	(4.8670 acres)

Aerial View Of Commercial Area





Street View Commercial
Looking West from Intersection

Proposal to improve 167th Avenue without berming, thus maintaining exposure to customers and enhancing business growth.







1" = 100 feet







LandMentor Certified Consultant

Rick Harrison Site Design Studio

8832 7th Ave North
Golden Valley, MN 55427
763-595-0055
www.rhsdplanning.com

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Rum River Hills Process

Step 1
City Council Public Works (CCPW)

Focus
Preliminary review of updated comp. sewer and water plan.

Required Information
Bolton & Menk completes new comprehensive sanitary sewer system plan.

Outcome
General guidance on supporting, or not to support, the 167th line to be included in study. If not included, this sewer line will need to be privately funded. If included, this sewer line will be funded via city's trunk fund.

Step 2
Planning Commission (PC)

Focus
Preliminary review of proposed request for a change in land use, and proposed site layout.

Required Information
RRH to provide a site layout map.

RRH to provide available renderings.

RRH to provide basic information on proposed land use (acres, number of units, style of product, HOA, etc.).

Outcome
General preliminary guidance on the proposed land use request. Identify any major red flags and see if there is preliminary support for further investigation. Also, identify any public engagement requirements.

Step 3
Economic Development Authority (EDA)

Focus
Preliminary review of subsidy requests (i.e. review the "deal").

Required Information
RRH needs to provide a draft project budget (sources and uses, including equity).

RRH needs to provide information on primary financing agency and/or developer.

RRH term sheet for deal (various agreements/ requests).

Outcome
General preliminary guidance on term sheet.

General preliminary guidance on cost-benefit of deal.

Outline potential funding sources

Step 4
City Council

Focus
Preliminary review of project overall. Provide general direction and next steps.

Required Information
Public works committee feedback.

Planning Commission feedback.

Economic Development Authority feedback.

Outcome
1. General guidance on supporting, or not supporting, the inclusion of the 167th sewer line in comprehensive sewer plan study.
2. General guidance on land use request and required public engagement processes (public, Parks Board, and EPB).
3. General guidance on the deal (term sheet).
4. Consider inviting RRH to formally apply for a business subsidy.
5. Identify questions and any additional information needed.

RRH FAQs
Last Updated: 12/07/2017

Answers provided by Rum River Hills (RRH)

1. **How will the project be funded/ managed/ owned?**

We have two alternatives to select from to acquire the funds to complete the project.

A. *Venture capital funding: RRH would act as General partner of the real estate development and sales. RRH has partners experienced in all facets of the steps required to bring this project to a successful conclusion. This is going to be our desired methodology as we have complete control of the project. We would negotiate an agreement with an experienced developer/contractor to act as our liaison with other experienced building . It is desirable to offer different building styles and price ranges for the potential purchaser to choose from within the development. The different styles and price ranges will be divided into separate neighborhoods.*

B. *Developer funded. A contractual agreement would be negotiated between RRH and a developer that would be given control of housing portion of the development. The developer would utilize his funding resources to secure the funds to develop the infrastructure. The three property owner groups would sell the platted lots to the developer at a negotiated price*

The reality of the two scenarios is that the funding and structure will probably be a blend of the two alternatives. Since the current process is conceptual in nature, this is merely a proposed viable methodology to structure the organization and secure the funds for the infrastructure.

As the process proceeds from the conceptual phase to a completion of the final plat approval, these two alternatives will possibly change completely.

--Rum River Hills

2. **Why doesn't RRH complete the proposed project on their side of Highway 47 (east side)? RRH has 7.8 acres of land sitting vacant on the north side of their development (east side of 47). The city's property is located on the west side of 47. After deduction of ROW needed for Quicksilver, the City's property is roughly 9 acres (about 1-acre difference).**

The projects concept is to develop a community with golf carts as the main mode of transportation for transportation to essential services, entertainment and relaxation. The community' s population would stimulate the revitalization of the depressed shopping area at 167th and Highway 47 to provide these services. The concept plan requires a large number of homes to be built and seven acres is not enough space to accomadate this goal. The city's land west of Highway 47 has only 6.7 acres of viable residential land as the water tower height requires a 150 % setback. There is also a wetland area on the SW corner of this property as well as a major gas pipeline traversing the property from West to East which precludes any residential development within the area of the pipeline.

However, The setback areas of the water tower and the gas pipeline can be utilized as a golf course and the wetland would be an amenity for the golf course. The land on the East side of Highway 47 is included in the project to provide additional residential units. Essentially the plan moves the two golf holes to non viable residential property adjacent to the water tower and utilizes the previous land area occupied by the holes at the resent time as residential property.

--Rum River Hills

3. **Why would the city provide public assistance to RRH, and not The Links at Northfork? The Links at Northfork paid for a bridge over Alpine; and, rather than requesting use of city land/ city assistance, they have donated the city land in multiple scenarios.**

The bridge over Alpine at Northfork was constructed for the sole purpose of conveying golfers from one side of the road to the other side of the road. The tunnel under highway 47 would be part of the trail system of the city of Ramsey which will connect with the residents on the easterly side of highway 47 to the westerly side in a safe manner. The tunnel also provide a safe mode of transportation to the city park which contains the soccer fields. Highway 47 is also a state road with a high traffic volume. The city has requested permission from the state on several occasions to install a traffic signal at the intersection of Highway 47 and 167 th avenue and have been rejected. This tunnel would be a partial solution as the youth of the area would have a safe method to cross highway 47. This project will also upgrade the northern access to the soccer facility on McKinley

--Rum River Hills

4. **Has a real developer shown real interest in this project, not just RRH? Has the developer reviewed the preliminary financials/ budget, and shown genuine interest, and ability to place the required significant equity into a project like this?**

Yes, We have two viable developers and we have an alternative plan utilizing venture capital. The sticking point is the sewer line. The sewer line should be in place for the all the potential development of the vacant land in the NE quadrant of the city. The line is also an essential factor to revitalize the shopping node at 167 th av and highway 47. The city is at an age that most communities pass through during their development that they transition from septic systems to a centralized public system. The sewer system line should not be earmarked for this development project. However, the 180 to 200 homes would pay for the line through taxes within ten years.

5. **If the City were to move forward with this project, due to the proposed upfront $3M public contribution, we would likely require performance by RRH (or the developer), to complete a certain number of homes, a certain quality of homes, by a certain time. We would want to know RRH (or the developer) is on board with considering that type of arrangement.**

   If the sewer system was not earmarked for this project but part of the overall plan for the area, The city would have the cost of the tunnel earmarked for this project. The tunnel as mentioned previously would become a part of the city trail system. The current estimate from SEH would be around 500 to 600 K. which would be public funds. The topic in (4) would addressed in the development agreement between the city and RRH.

   --Rum River Hills

Economic Development Authority (EDA) **4. 2.**

Meeting Date: 12/14/2017

By: Tim Gladhill, Community Development

Title:

Review Draft Economic Development Chapter of Comprehensive Plan

Purpose/Background:

The purpose of this case is to review a draft of the Economic Development Chapter of the Comprehensive Plan and make a recommendation to the Planning Commission. This Chapter will be an iterative review process as subsequent chapters are completed. This will not be the last time the Committee will review this chapter.

Observations/Alternatives:

Please see the attached document for specifics.

Recommendation:

Staff recommends that the Committee provide input on this draft and make recommendations to the Planning Commission for their January 4 meeting.

Action:

Provide input and recommendations on the draft chapter.

Attachments

Economic Development Plan

Form Review

Inbox	Reviewed By	Date
Tim Gladhill	Kathy Schmitz	12/08/2017 10:38 AM
Patrick Brama	Katie Schmidt	12/08/2017 02:21 PM
Kurt Ulrich	Katie Schmidt	12/08/2017 02:21 PM
Form Started By: Tim Gladhill		Started On: 12/08/2017 10:20 AM
Final Approval Date: 12/08/2017		

City of Ramsey 2040 Comprehensive Plan Update

Economic Development Plan

Background on this Document

This document is a draft of the narrative to be used in the 2040 Comprehensive Plan Update. This is not a final version or actual layout. This document will be reviewed and revised multiple times. The City will try to add additional maps and figures to better tell the story of this vision.

Our Mission

It is our mission to work together to responsible grow our community, and to provide quality, cost-effective, and efficient government services.

Our Vision

Ramsey will evolve through citizen-driven, collaborative processes that respect the balance and connectivity between its unique urban, rural, and natural environment for current and future generations.

Core Values

1) Encourage new pedestrian friendly neighborhoods and balanced transportation.
2) Maintain landowner rights.
3) Employ careful foresight that involves all citizens in decisions that affect their lives, property, and neighborhoods through collaborative public engagement.
4) Nurture neighborhood and community interactions with flexibility to meet future needs without compromising the needs and interests of current residents.
5) Develop and maintain a well-connected park and public space system for all ages.
6) Attract and retain businesses that support the whole community.

DRAFT

2030 Plan Accomplishments

The last plan was adopted in 2010. While a number of factors changed since the last plan was adopted, the City can celebrate a number of successes as it relates to our land use vision. Subsequent chapters of the 2040 Comprehensive Plan will celebrate their own successes.

- Add accomplishments here. This section will be completed at a later date.
-

DRAFT

Goals and Strategies

The following represents goals and strategies for future land uses. Subsequent chapters will include their own goals and strategies that integrate with the above. Resources above and beyond current budget approvals are indicated in the 'Additional Resources' column.

Strategic Imperatives (4 key themes from Phase I of update)

1. Rural Character and Urban Growth Balance
2. An Active Community (Parks, Recreation, and Open Space)
3. A Connected Community (Transportation)
4. A positive learning environment

Goal/Initiative	Tactic	Timeframe	Key Outcomes	Additional Resources
	1) Business Retention & Expansion The large majority local economic growth comes from existing Ramsey businesses. The purpose of this goal is to develop and maintain positive relationships with existing Ramsey businesses (establish trust). This goal is implemented through quality customer service, businesses visits, and facilitating business events. In 2017, staff would like to review the option of utilizing the University of Minnesota's BRE program (link). If the EDA was interested in the program, Connexus Energy has indicated a willingness to sponsor the program (2018).	Ongoing	Complete 24 business visits annually. Execute EDA business expo, business appreciation golf tournament, and fall networking event. Participate in Anoka County Broker Event and MN Marketing Partnership. *This tactic fits within EDA objectives 2 and 3.*	Currently Sufficient: assuming moderate customer service demand levels, sufficient resources exist to complete this tactic as proposed.
	(2) Future Business Park Continue to move along the City's future business park initiative. Below are major work items to be addressed: 1. Finalize Economic Development Analysis 2. Develop and solidify the City's position/ involvement/ policy. 3. Attain shovel ready status.	Complete/Ongoing	"Ready-to-go" business park and clear position of City involvement. *This tactic fits within EDA objectives 2 and 3 and the City's strategic plan.*	Currently Sufficient: assuming moderate customer service demand levels, sufficient resources exist to complete this tactic as proposed. This work item does require use of third-party professional services (Shovel Ready Certifications, Economic Development Analysis, and subsequent due-diligence). TIF #1 and the EDA Fund have been identified as funding sources for this work in the past by the EDA and City Council.

DRAFT

	(3) Old Municipal Center Redevelopment Facilitate redevelopment of old municipal center site. Below are major work items to be completed: 1. Remove former Fire Station #2 and clean site 2. Close on sale of property, phase #2 3. Close out land-swap agreement with Meadow Creek Builders	Complete/Ongoinog	Old municipal center site cleaned and ready for sale by Winter 2016. *This tactic fits within EDA objectives 1 and the Council's strategic plan.*	Currently Sufficient: assuming moderate customer service demand levels, sufficient resources exist to complete this tactic as proposed. The Anoka County HRA account has been identified as a funding source for the demolition and site clean-up work in the past.
	(4) Recruit new industry and major retail businesses to Ramsey	Ongoing	Secure two new 30,000 square foot retail, and two new 30,000 square foot industrial facilities. *This tactic fits within EDA objective 1. This tactic fits within the City's strategic plan and Council policy discussions.*	Currently Sufficient: this tactic requires assistance from the City's real estate broker CBRE; and demand from the development market. In order to provide latitude on which method is selected to tackle this goal (several exist), staff is requesting an increase of the EDA marketing budget line item from $3,000 to $30,000 in 2017.
	(5) Sell Surplus City Owned Land The City owns a large inventory of surplus land available for development. Attain shovel ready status for all listed City owned property (including cut/fill estimations and identifying major costs for development—such as required extension of public infrastructure).	Ongoing	Land sales are closed. Staff shall provide an annual overview. *This tactic fits within EDA objective 1. This tactic fits within the City's strategic plan and Council policy discussions.*	Currently Sufficient: assuming moderate customer service demand levels, sufficient resources exist to complete this tactic as proposed. This work item does require use of third-party professional services (Shovel Ready Certifications and subsequent due-diligence). TIF #1 has been identified as a funding source for this work.
	(7) COR Development Pro-Forma and Policy The City of Ramsey has taken the role of master developer for The COR. From a development perspective, the list of City obligations (expenditures) for The COR is relatively long, and at this point not well-defined. Additionally, the list of revenue streams from The COR is relatively straight forward, but have been committed informally in several instances. Staff would like to develop a pro-forma for The COR outlining all anticipated expenses and all anticipated revenues for the project.	2018	Completed development pro-forma.	This work will require assistance from third party professionals: (A) infrastructure analysis for The COR--$20,000-$30,000. (B) regional stormwater plan for The COR--$15,000-$30,000. (C) updated sign plan and cost estimates for The COR--$5,000-$15,000. At this point, the numbers outlined above a very preliminary. Staff would like to get quotes for EDA review.

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	NOTE: this work has been partially completed in the past in many different forms (i.e. Landform, Ehlers, City C.I.P., etc.). This discussion also warrants the City to take policy positions on various items (i.e. expenses) and how they will be paid for (all city, all developer, split, etc.), and roughly when various improvements will be made. Completion of this pro-forma will put the City in a much better position to effectively analyze development proposals, strategize marketing efforts (i.e. pricing of land), budget discussions, and various policy items.			Staff anticipates various funding sources will be utilized to implement this work.
	(8) RALF The Metropolitan Council reinstated the RALF (revolving acquisition loan fund) program in 2015 with eligibility modifications which significantly affect cities' ability to use this program. In fact, since the 2015 rule change, no RALF awards have been made by the Metropolitan Council, to any city Staff would like the EDA/ City Council to consider pursing amendments/ exceptions to the RALF program criteria. Staff is receiving requests/ inquiries from Highway 10 property owners RE this subject; which are intensifying with time. Staff would like to submit a RALF application to the Metropolitan Council to test/ challenge their new policies and positions. Additionally, said application will serve as a base point for future policy discussions for the City of Ramsey.	2018	A RALF program that can actually be utilized by the City of Ramsey.	No additional resources requested. Normal staff duties.
	(9) Business Incubator Consider utilizing vacant space on the second floor of the Ramsey Municipal Center for a business incubator	2018	Decide if the City has a genuine interest in starting a business incubator.	At this point, no additional resources are being requested. Based on the scope of this project, additional resources will be needed.

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	program—(or a cowork space, COCO). Staff would like to kick the process with a scoping meeting (i.e. how should we approach this task).		Have a general scope for what a business incubator means in Ramsey.	
	(10) ZIP Code In 2015, the City of Ramsey did open its doors to the first ever Ramsey substation USPS Post Office. Although this is a positive step for Ramsey, the need for an independent zip code still exists. The purpose of this tactic is to pursue an independent zip code for our community. Process: 1. Meet USPS minimum standards for obtaining a new zipcode (delivery points, deliver routes, scheme items, sectors). The City needs to submit a request for an audit. 2. USPS audit made—Ramsey either meets minimum thresholds or not. If they do, move on to step 3. 3. USPS conducts a survey of community to gather feedback/ support for a new zip code. 4. USPS grants Ramsey a new zip code.	2018	Approval or denial of a new Ramsey zip code.	No additional resources requested. Normal staff duties.

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Existing Industrial Opportunities

Put something here.

Ramsey/Anoka Industrial Park.

Put a description here. It is 1,000 acres.

- About 1,000 acres
- About 15,000 jobs
- Hundreds of businesses, with a high concentration of manufacturing

Future Industrial Opportunities

Put something here.

- New 115-acre business park NW of new interchange
- 15-acre Connexus site, within existing business park.
- 9.3-acre city owned site, within existing business park.

Bunker Lake Industrial Park

Put a description here.

Figure 1: Map of Bunker Lake Industrial Park

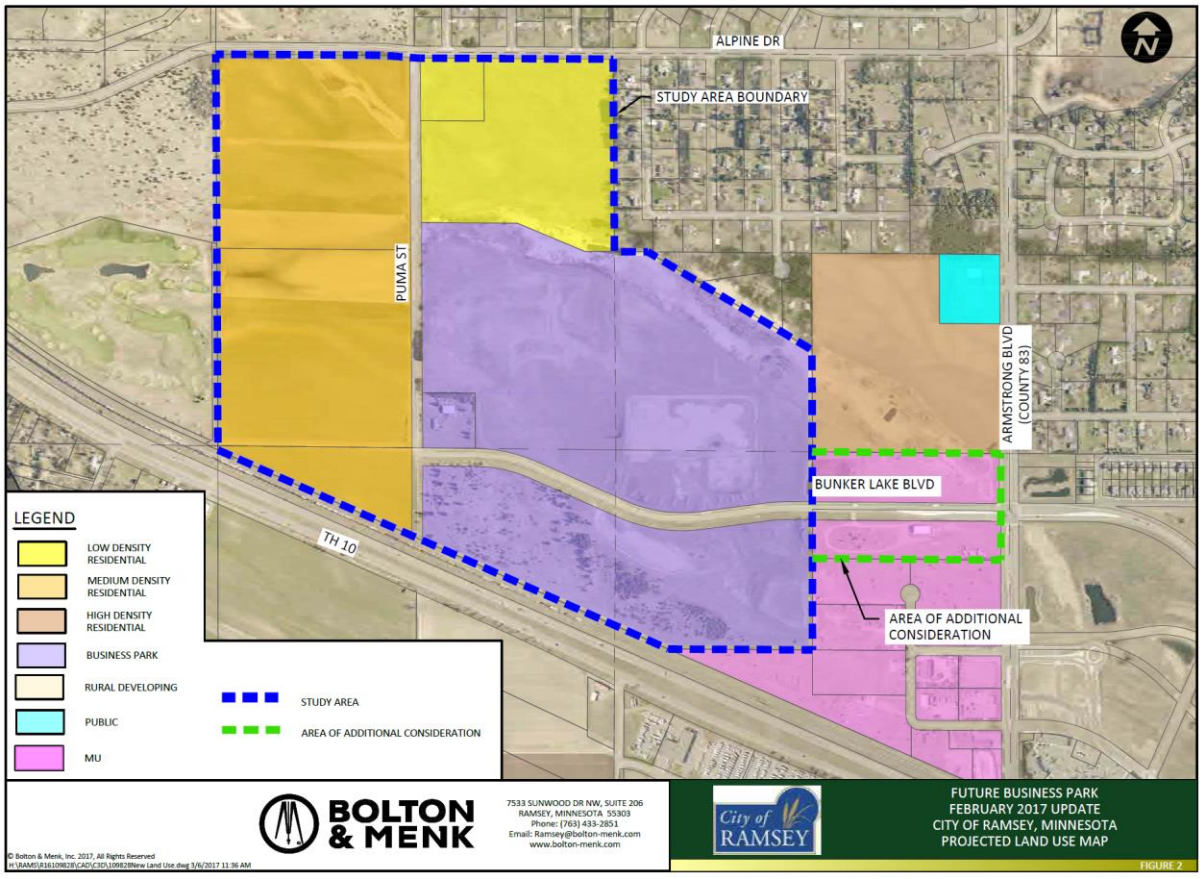


Figure 2: PSD, LLC Master Plan

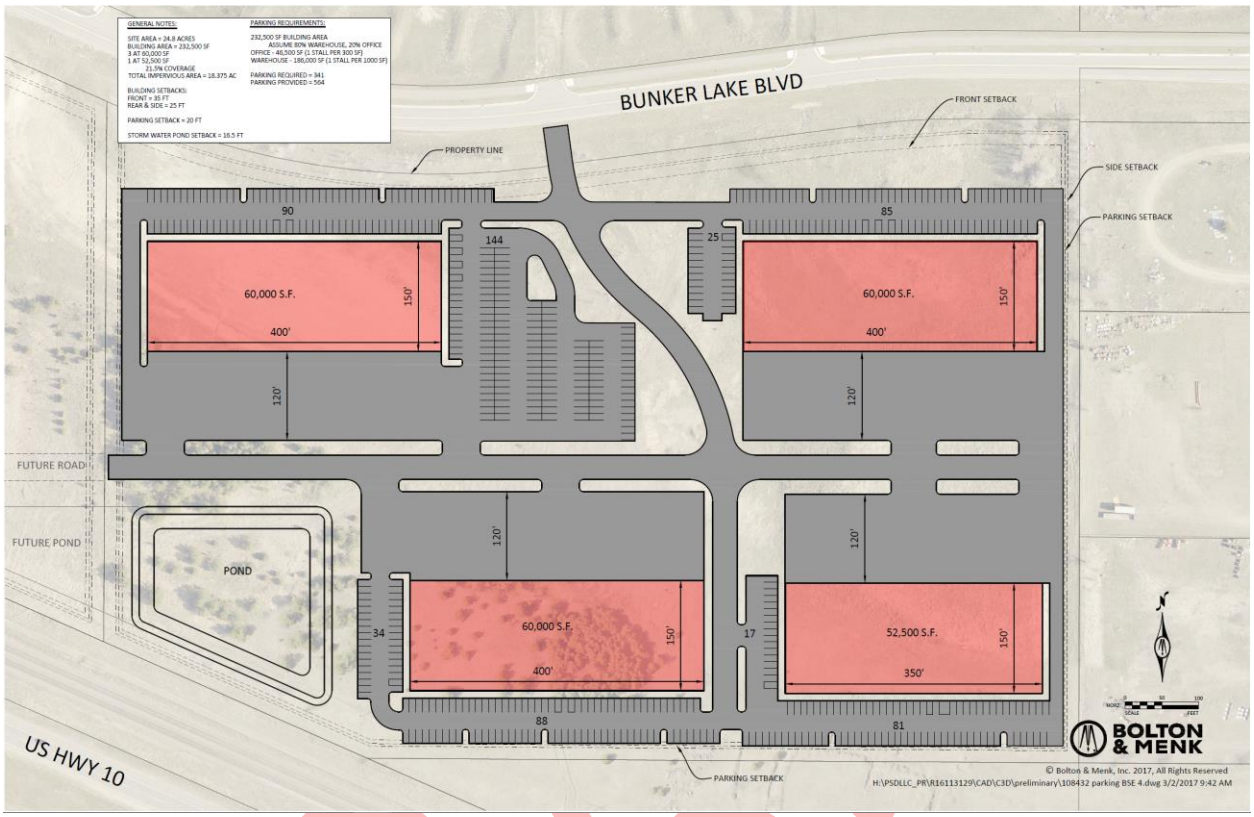


Figure 3: Hageman Holdings



Retail Development Goals

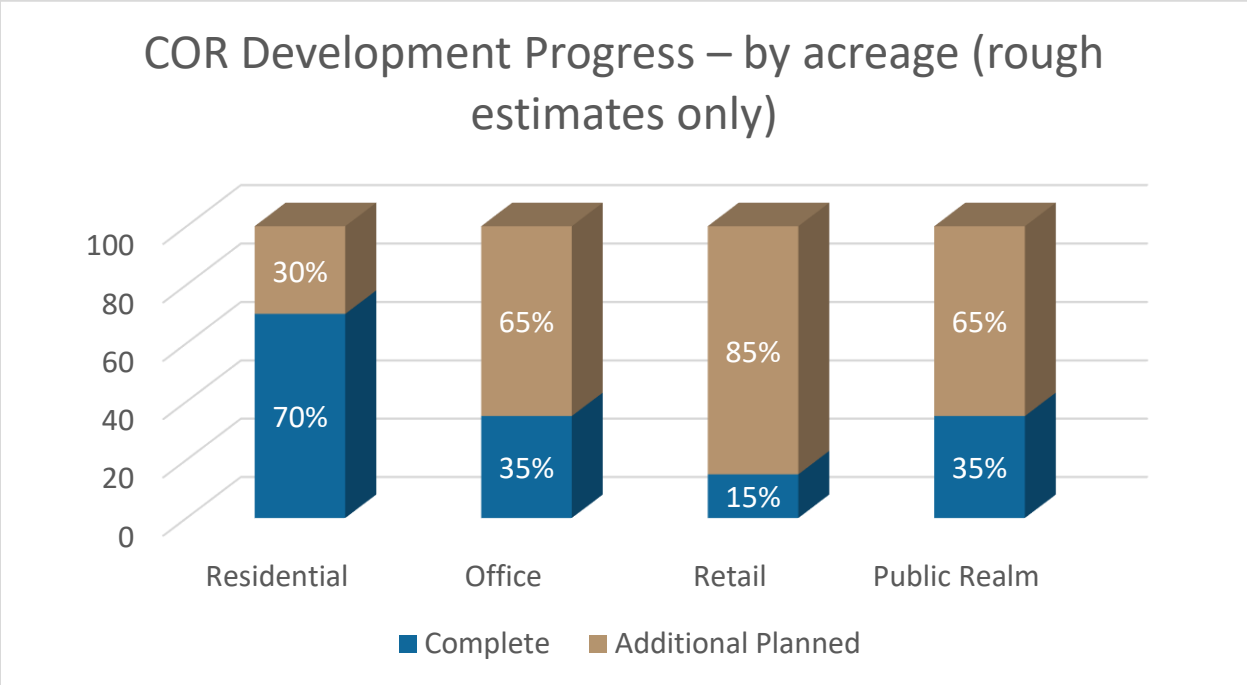
Describe our retail goals here. 115 acres guided for future retail development.

Figure 4: Retail Guided Areas

Create a map of the areas guided for retail.

Retail Goals in The COR

Table 1: Planned Growth in The COR



Rum River Hills

This is the 167th Node.

Background

The retail node located at 167th Avenue and Trunk Highway 47 has been a topic of discussion with City Councils and EDA boards for several years ("167/47 Node"). The 167/47 Node has struggled to become economically viable for some time, is experiencing high vacancy rates, an increase of blighted building conditions and escalating crime.

The City has received a significant number of inquiries from property and business owners located in the 167/47 Node from 2012 to 2013 requesting assistance to address concerns. Additionally, the City of Ramsey owns an inventory of real property located adjacent to the 167/47 Node totaling 16.52 acres. Said property was identified as surplus City owned land in 2012 and is available for sale.

The EDA, Planning Commission and City Council have expressed interest in addressing the 167/47 Node.

Purpose

Guide City participation in the redevelopment of the 167/47 Node; and, specifically identify a common goal, vision, working parameters and garner public input.

The desired outcome of this document is to develop a clear, consistent, transparent and fair process the City, prospective developers, property owners and Staff can rely on as proposals are received. The Ramsey Economic Development Authority (EDA) shall act as first point of contact for City in relation to the 167/47 Node by utilizing this Statement of Goals.

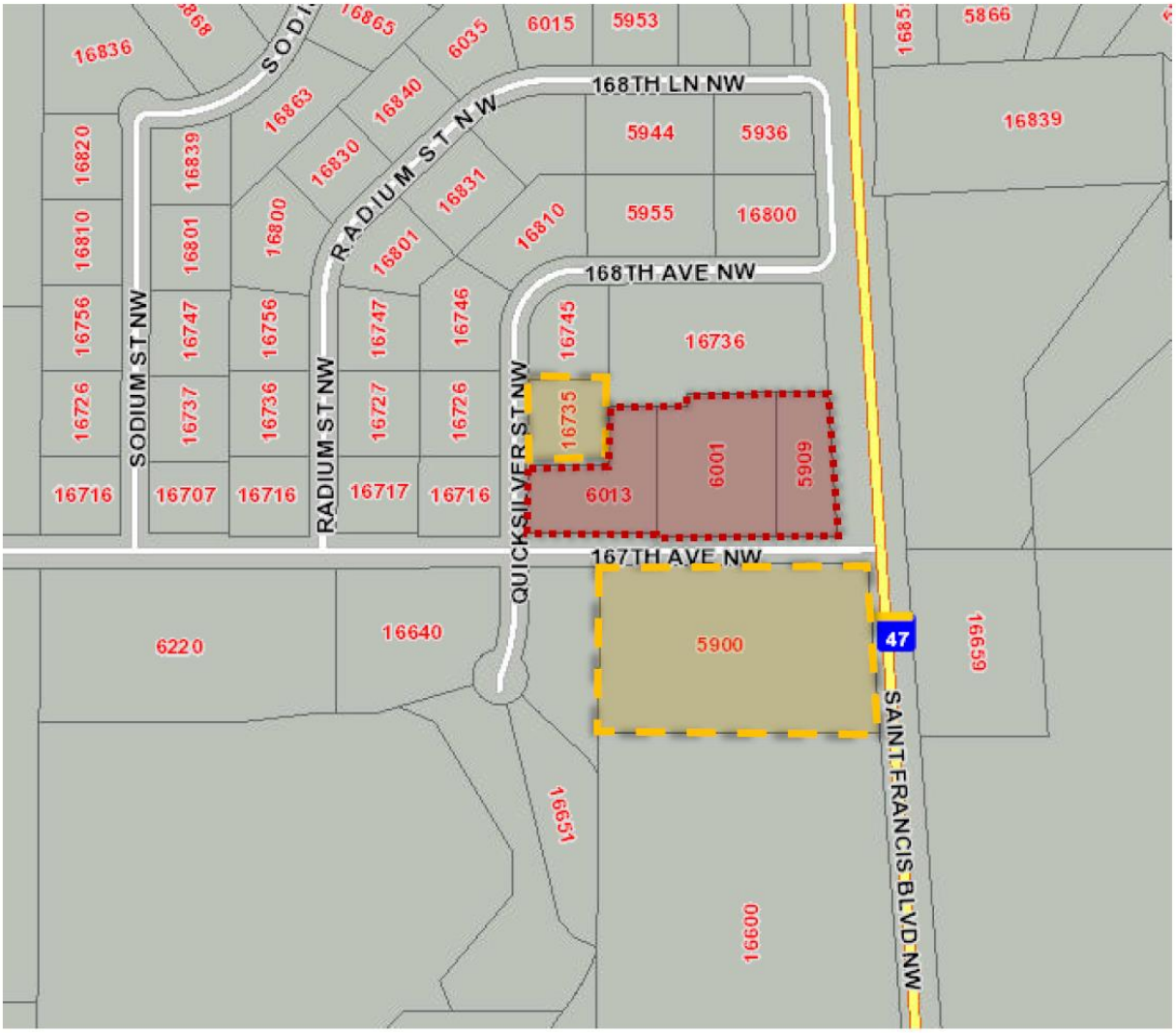
Note: The City Council makes all final policy decisions; which may deviate from this document. This document is not a legally binding agreement.

Goal

To improve and/or remove blight from *properties-of-concern* and encourage sustainable market-driven redevelopment of the 167/47 Node that will benefit the entire City of Ramsey.

Figure 5: Area of Concen

RED [Sort Dash]: Primary Area of Concern
YELLOW [Long Dash]: Secondary Area of Concern



Vision

A mixture of residential and retail uses. Residential users may include single family residential, townhomes, or senior living units as directed by the market. Retail will include a market driven neighborhood commercial node. Redevelopment of the 167/47 Node should include a connection to Elmcrest Park and/or nearby trails where feasible.

Parameters

Listed below are a number of parameters intended to develop a clear, consistent, transparent and fair process the City, prospective developers, property owners and Staff can rely on as proposals and inquiries are received.

A. CITY LAND ACQUISITION: The City does not support purchasing property to redevelop the 167/47 retail node.

B. MARKETING: The Ramsey EDA does support facilitating a professional marketing package for the 167/47 retail node to entice redevelopment/investment; which would include:

I. Information matrix: asking prices, County valuations, tax information, utility information, ownership buy-in, maps, current zoning information, future land use information, etc.

II. An inventory of what City and State financial assistance options exist for a potential redevelopment project.

III. List of desirable uses (i.e. retail and wide range of residential); and, other allowable uses (i.e. compatible to surrounding residential)

IV. Professional material developed in partnership with the City and proactively marketed by a third party broker. Broker will be chosen by ownership group.

V. Marketing material shall be paid for by the ownership group. The Ramsey EDA is willing to considering financially contributing to this effort.

C. ZONING:

I. The City would support a Comprehensive Plan and Zoning Amendment to allow retail or residential (of the appropriate density that balances compatibility of the surrounding area and market viability) land uses at 167/47 Node.

II. The Planning Commission will review requests for additional Permitted or Conditional Uses.

D. CITY FINANCIAL ASSISTANCE:

I. *AVAILABLE TOOLS:*
The City has a number of financial assistance programs potentially available for qualified projects; including

1. Redevelopment Tax Increment Financing District (TIF)

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2. Tax Abatement
3. EDA Revolving Loan Fund (RLF)
4. Anoka County HRA Account
5. State Redevelopment Grant and Loan Program
6. Land Write Down (City Owned Parcels)

The City will consider all financial assistance programs listed above only for projects that directly address existing blighted properties; see Appendix A: Primary Area of Concern.

Utilization of financial assistance requires completion and approval of a Business Subsidy Application by the Ramsey EDA and City Council. Consideration will be based on the merits of an individual project and community benefit.

II. EDA REVOLVING LOAN FUND (RLF)

Upon adoption of this Statement of Goals, the Ramsey EDA will review alternatives to utilize the City's existing Revolving Loan Fund (RLF) to stimulate cleanup and revitalization of the 167/47 Node. This *may* include, but is not limited to the following:

i. Storefront Matching grants to help encourage/spark the 'clean-up' or improved 'curb-appeal' of properties. For example, a matching grant with a $10,000 maximum City contribution.
ii. Revitalization Loan Program: low interest loans that are tied to revitalizing properties to a marketable condition.

NOTE: the City has about $275,000 available for these types of programs. This effort would require the creation and adoption of new program polices.

III. PEDESTRIAN UNDERPASS

It has been requested, for the City to consider funding a pedestrian underpass to connect the east and west side of MN trunk Highway 47. A pedestrian underpass would increase public safety, enhance connectivity to and from Elmcrest Park and increase foot traffic to retail businesses.

At this point, the City will not pre-commit a specific funding source, or specific dollar amount, to a pedestrian underpass. The City would react to this specific request at the time of future development; and, would base their response on the merits of a project—and the value it will bring to the community. Examples of potential funding solutions below:

i. Cost Share Agreement with developer (most desired)
ii. Redevelopment TIF District proceeds
iii. Grant Programs (various)
iv. Park/Trail Dedication Fees (from 167/47 area, new development)
v. Land Write Down Contribution (city owned parcels)
vi. Anoka County HRA Account

NOTE: When future development occurs, the City will consider methods beyond a pedestrian underpass for increasing safety at the 167/47 intersection.

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IV. SEWER TRUNK FUND

The 167/47 Node is not currently connected to City sanitary sewer service. Extending sanitary sewer service to this node will make properties more attractive for future development and will provide existing property owners with an alternative to the use of septic tanks.

Presently, the City of Ramsey is not willing to *fully* fund a special sanitary sewer service line to the 167/47 Node. However, if a property owner (or developer) was willing to share the cost of extending sewer service, the City would be willing to discuss an agreement.

NOTES:
The cost of extending a special 8" force main sanitary sewer line to the 167/47 Node is estimated to be $1.5M. It is estimated, at full build out, the special 167/47 Node sewer trunk line would recapture $500,000-$750,000 in sewer trunk fees (based on 2012 adopted sewer trunk fees). Therefore, a shortfall of $750,000-$1M in funding would occur.

Additionally, extending an undersized, special, sanitary sewer line to the 167/47 node may result in extra costs (in the long run) if the City ever decided to serve the north east portion of the Ramsey with sanitary sewer service.

Today, the City does have sufficient trunk fund dollars to pay for the 167/47 Node special sanitary sewer line. However, the City is planning for sanitary sewer service in three other future growth locations in Ramsey. Unlike the 167/47 Node, said areas do have sufficient forecasted development capacity to fully recapture the cost of proposed future sanitary sewer trunk lines.

Public Input

Two levels of public input were critical to this Statement of Goals: (A) Primary Property Owners; and (B) Surrounding Property Owners.

A. Primary Property Owners:

Primary property owners are outlined in Appendix B.

The City does support facilitating an ownership meeting group to brainstorm options, share information and to investigate opportunities for redevelopment and additional uses that are compatible with the surrounding residential area. This effort will be led by the Economic Development Authority (EDA).

The City desires a consistent, collaborative approach with a single voice amongst all property owners. Several separate messages per individual property owner is not a desired nor effective approach.

The City has received direction from surrounding property owners to market the entire 167/47 Node as an opportunity to developers—rather than only marketing properties individually. Through the EDA, the City will explore options to support a joint marketing effort for the 167/47 Node.

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B. Surrounding Property Owners:
On September 26, 2013, the City of Ramsey hosted a collaborative public process with residents to discuss opportunities and barriers for redevelopment of the 167/47 Node. The intent of this process was to garner general public input before specific development proposals were crafted and reviewed by the City; and, before this Statement of Goals was adopted. The planning and facilitation of this public input process was led by the Planning Commission. 232 nearby property owners were invited via direct mailing, 26 participants registered and staff estimates over 30 people attended.

The following summarized public input was received:

I. PUBLIC UN-DESIRED USES
- Manufacturing
- Warehousing (in most cases)
- High density housing

II. PUBLIC DESIRED USES/IMPROVEMENTS
- Grocery store, coffee shop, convenience store, gun range, bar/lounge, hardware store, restaurant
- Anchor businesses
- Single family homes, retirement homes
- Townhomes are acceptable (in most cases)
- City support, light at intersection, address septic/sewer
- More rooftops and population needed

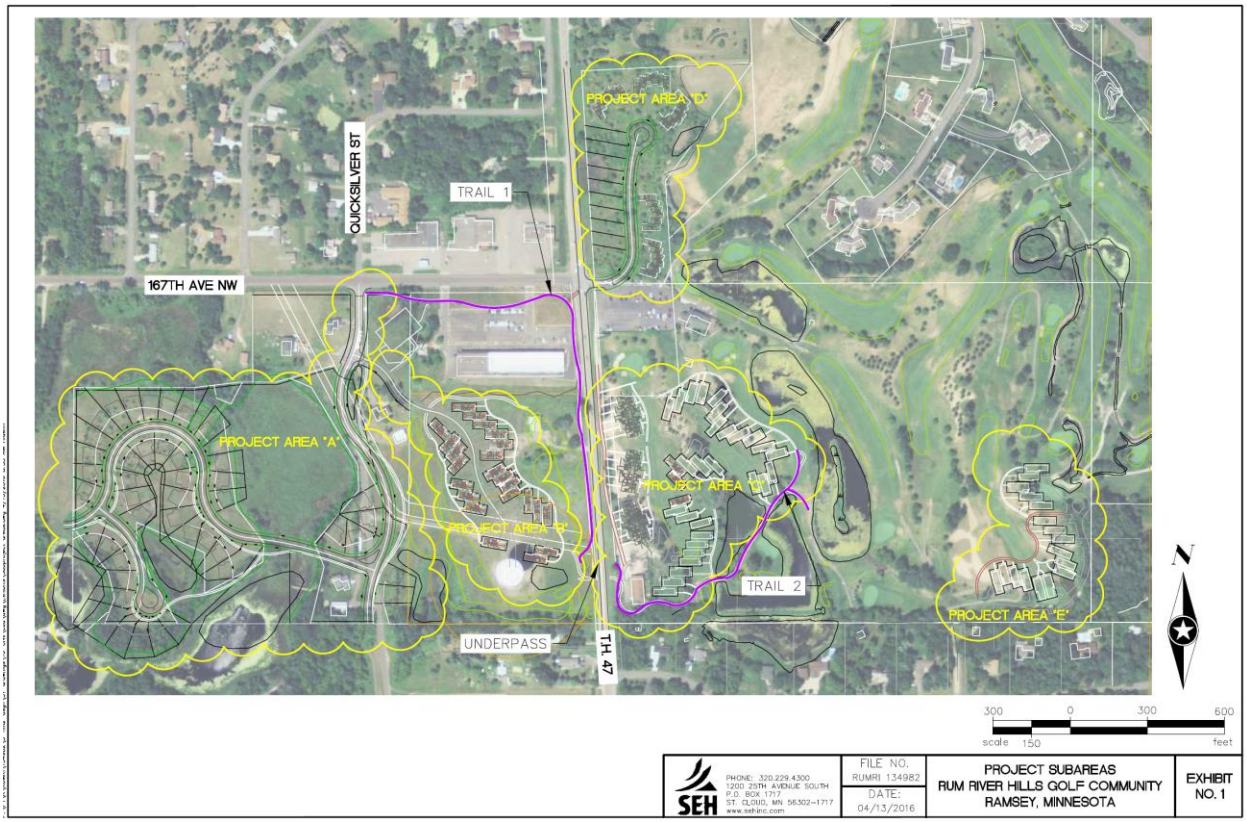
Continued on next page.

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Rum River Hills Redevelopment Plan

The Rum River Hills has proposed a redevelopment plan to the City.

Figure 6: Rum River Hills Development Plan



Economic Development Tools

The City of Ramsey has a number of financial tools available for economic development projects. Below is an overview of common economic development tools.

GAP FINANCING:

1. Ramsey Revolving Loan Fund (RLF)
2. Minnesota Investment Fund (MIF)

The City's RLF and the DEED MIF programs are used to fill the financial "gap" of a particular project. A financial gap occurs when private financing and/or owner equity cannot fund an entire project. Commonly, these programs are used to purchase equipment; however, other eligible uses exist. Interest rates and terms are negotiable.

DEED JOB CREATION FUND:

3. Capital Investment Rebate
4. Job Creation Rebate

DEED assistance to projects that have capital investment and provide well-paying jobs. Program would allow for a company to receive a 5% rebate on capital expenditures (construction costs, materials etc.) up

to $500,000. In addition, this program allows for up to $500,000 in job creation rebates based upon jobs created and their salary levels.

PROPERTY TAX PROGRAMS:

5. Tax Abatement
6. Tax Increment Financing (TIF)

Tax abatement and TIF are local tax programs typically used for development or land acquisition costs. In general, both programs work by capturing property taxes generated by a particular parcel then dedicating said tax revenue for a specific project cost.

PRIMARY FINANCING:

7. Private Primary Lender and/or Owner Equity [no involvement from City]
8. Industrial Revenue Bonds (IRB)

Typically, projects are funded in large part by a private primary lender and with some level of owner equity. Certain manufacturing projects are eligible for complete funding via Industrial Revenue Bonds (IRB). IRBs are have a tax exempt status—which results in a lower interest rate for the borrower.

HOW DO I KNOW WHAT TOOLS I AM ELIGIBLE FOR?

Identifying finical tools your business may be eligible for is a clearer and cleaner process if project specs can be provided to the City (i.e. project budget, job details, building specs, etc.).

DISCLAIMER: Eligibility for financing tools based on the merit of an individual project, compliance with specific program requirements and in many cases approval from the Ramsey EDA and City Council. The City of Ramsey targets quality projects with high quality job growth. Typically, projects require owner equity and/or private financing. Most programs require specific job creation goals and annual reporting. The following pages provide detailed information on each program.

Tax Increment Financing

Description goes here.

Figure 7: Development District No. 1

A map of Development District No. 1.

Figure 8: Tax Increment Financing Districts

A map of TIF Districts.

Economic Development Implementation

The Metropolitan Council's Regional Development Framework, ThriveMSP 2040, outlines roles for the Metropolitan Council and Ramsey for land use policy. Specific to land use policy, the Metropolitan Council has set a goal for the region to achieve Economic Competitiveness.

Ramsey Role	Metropolitan Council Role
• Consider how local efforts to focus economic development strategies along existing commercial centers (historic downtowns or commercial corridors) can contribute to the region's overall economic	• Invest in regional amenities and services, • including transit, regional parks and trails, and bikeways to support the Emerging Suburban Edge area as an attractive place to locate and do business.

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competitiveness through enhanced integration of local and regional planning efforts. • Protect sites for highway-, river- and rail-dependent manufacturing and freight transportation needs from incompatible uses and identify local land supply and transportation needs for effective use of those sites. • Identify important multimodal intersections, alternative freight routes, key intersections, and other existing opportunities that may contribute to local and regional economic competitiveness.	• Promote local planning around key intersections, regional infrastructure, and business needs. • Support the development of workforce housing to provide nearby housing options for employees of local employers. • Convene interested partners to further strategies towards increasing regional competitiveness and include discussion of how Emerging Suburban Edge communities can contribute to the region's overall economic growth.

Action	Priority	Timeframe

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Economic Development Authority (EDA) **4. 3.**

Meeting Date: 12/14/2017

Submitted For: Patrick Brama, Administrative Services

By: Patrick Brama, Administrative Services

Title:

CBRE: Updates and Pricing Strategy (portions of this case may be closed to the public)

Purpose/Background:

Purpose:

(1) Receive update from CBRE (Brian Pankratz) on marketing efforts for the sale of City owned land. Please reference the attached presentation.

(2) Review pricing strategy for the sale of city owned land.*

*The pricing strategy discussion will occur during closed session. Staff will be sending confidential materials to the EDA directly, via email. The attached reference map shows the various properties currently available for sale/ purchase. Although CBRE is the City's broker, for various reasons, they are not listing all available City owned properties. Staff is requesting EDA input on the proposed/ updated pricing strategy. Staff will be taking this case to the Council in January.

Notification:

NA

Observations/Alternatives:

NA

Funding Source:

NA

Recommendation:

NA

Action:

NA

Attachments

CBRE Update

Ref Map

Current CBRE Listings

Form Review

Inbox	Reviewed By	Date
Kurt Ulrich	Kurt Ulrich	12/08/2017 11:41 AM
Form Started By: Patrick Brama		Started On: 11/10/2017 01:25 PM
Final Approval Date: 12/08/2017		

December 2017 Market Snapshot

Presented to:
The City of Ramsey, MN

Presented by:
Brian Pankratz
First Vice President
952 924 4665

Markets Overview

CBRE 3st Quarter 2017 Numbers

- **Office**
  - Vacancy Rate 16.8%
  - Net Asking Rate $14.71 PSF
  - Net Absorption 113,475 SF
  - Under Construction 370,273 SF

- **Industrial**
  - Vacancy Rate 4.2%
  - Lease Rate $6.07 PSF
  - Net Absorption 2,364,199 SF
  - Under Construction 2.24 million SF

- **Retail**
  - Vacancy Rate 8.3%
  - Net Asking Rate $18.21
  - Net Absorption -218,426 SF
  - Under Construction 594,347 SF

Industrial Vacancy	4.7%	4.9%	4.2%
Office Vacancy	16.7%	16.8%	16.8%
Retail Vacancy	8.1%	7.4%	8.3%

Market Feedback

1. Armstrong Interchange Traffic Increasing
    1. New traffic generators
2. Residential Market
    1. Seeing demand for attached and entry level single family homes, move-up buyers
    2. Continued residential developments are needed to meet demand
    3. DR Horton townhome project finishing up. Replacement?
    4. AEON closed on 1st phase
    5. PSD 2nd Phase apartment
    6. According to Metrostudy 330 vacant developed lots, 119 starts over last 4 quarters
3. Ramsey Retail Location
    1. Located between two large retail nodes of Coon Rapids & Elk River
    2. Not directly on Highway 10-Sign Plan
    3. Additional residential development helps attract retailers
4. Industrial and Office Market
    1. PSD industrial project will bring new focus to west side of Ramsey
    2. Medical Office interest

Marketing Overview

- Marketing Overview
  - Monthly Email Blasts on each property
  - Listings on CBRE.com, Loopnet, MNCAR
  - Marketing Brochure Updates
  - Property Signs
  - Tracking New Developments and Market Information
  - Discuss Ramsey with developers, brokers, users
  - Constant conversation with City Staff on inquiries/prospects
- Over 1300 Inquiries
  - Reached out to brokers for top 20 quick service restaurants
  - Reached out to top 20 hard goods retailers brokers
  - Reached out to top 5 gas/c-store operators
  - Discussed Ramsey with top medical office brokers on existing users and potential demand
- Under Purchase Agreements/Pending Purchase Agreements -
  - AEON-Multifamily-Closed 1st Phase
  - Coastal Living-Detached townhomes-Closed , U/C
  - Municipal Site 2nd Takedown-2018
  - Daycare user-Closed, U/C
  - Senior Housing-PA, Entitlements

Marketing Suggestions and Next Steps

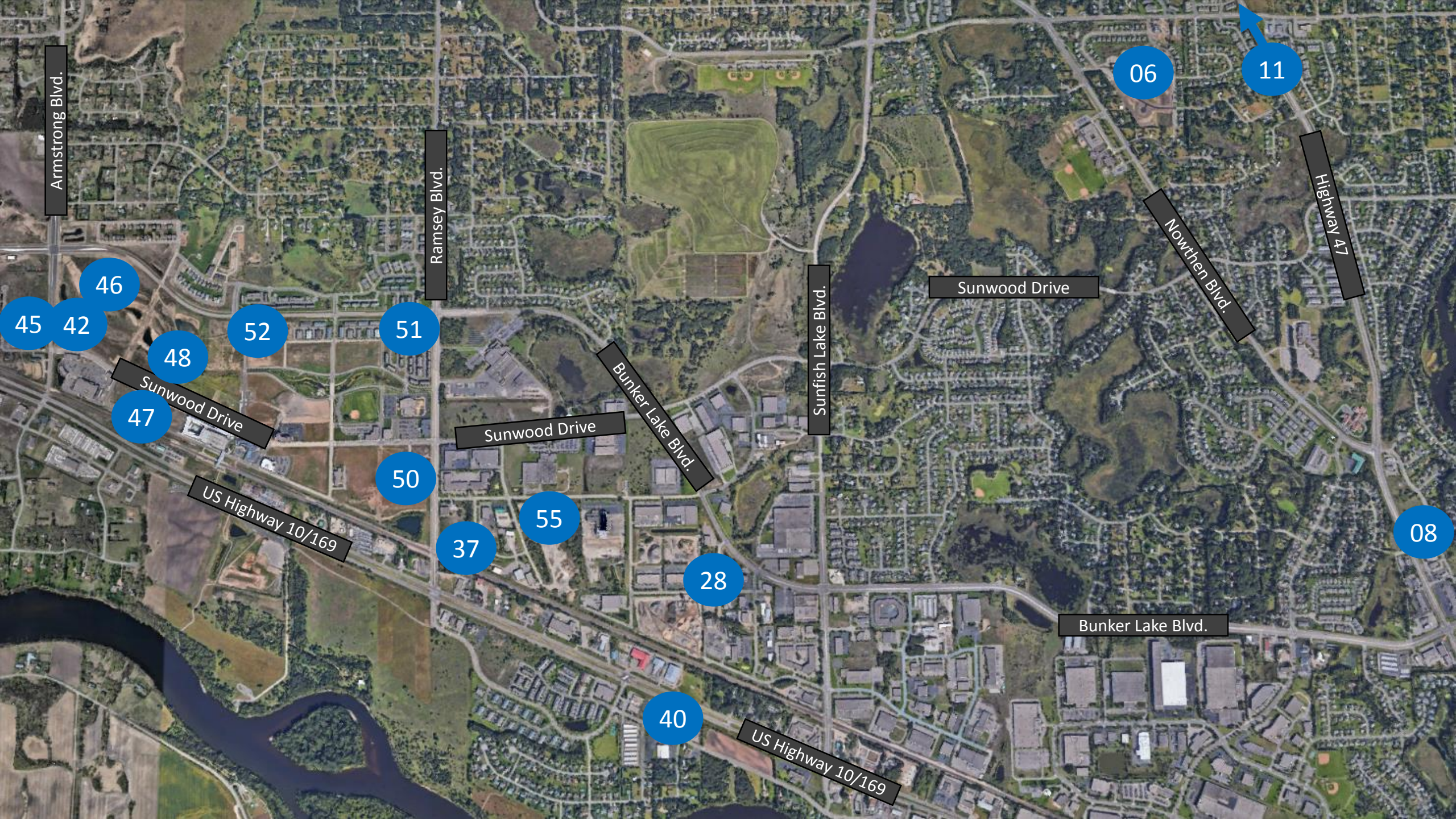
- Create sign plan for large monument signs on Highway 10 that will allow retailers the visibility to the large traffic counts on Highway 10. Most retailers would participate in the cost of the signage and maintenance
- Refine COR Vision for flexible zoning, FAR, density, setbacks, parking
- Continue to actively prospect retail , industrial, residential, and office developers/users showing the attributes of being located in the City of Ramsey
- Take advantage of current market conditions
- Continue discussions with YMCA or other community center type organization




Google




Google


Armstrong Blvd.
Ramsey Blvd.
Sunfish Lake Blvd.
Nowthen Blvd.
Highway 47
Sunwood Drive
Sunwood Drive
Sunwood Drive
Bunker Lake Blvd.
Bunker Lake Blvd.
US Highway 10/169
US Highway 10/169
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City of RAMSEY





LAND PARCELS OFFERING MEMORANDUM

CBRE

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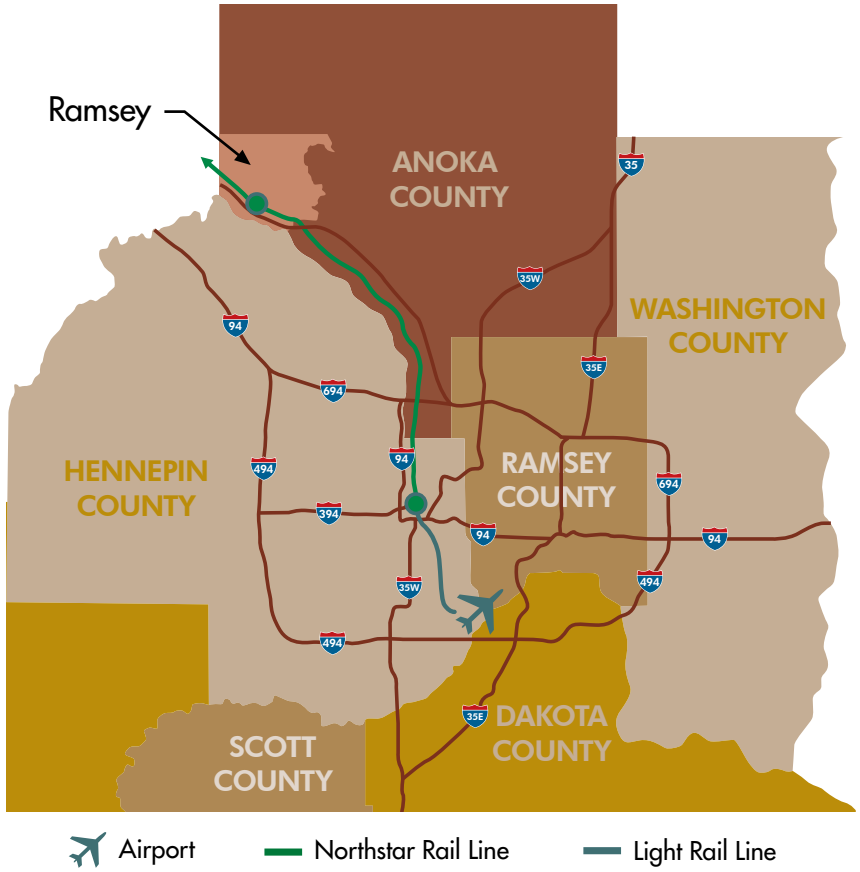
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EXECUTIVE SUMMARY

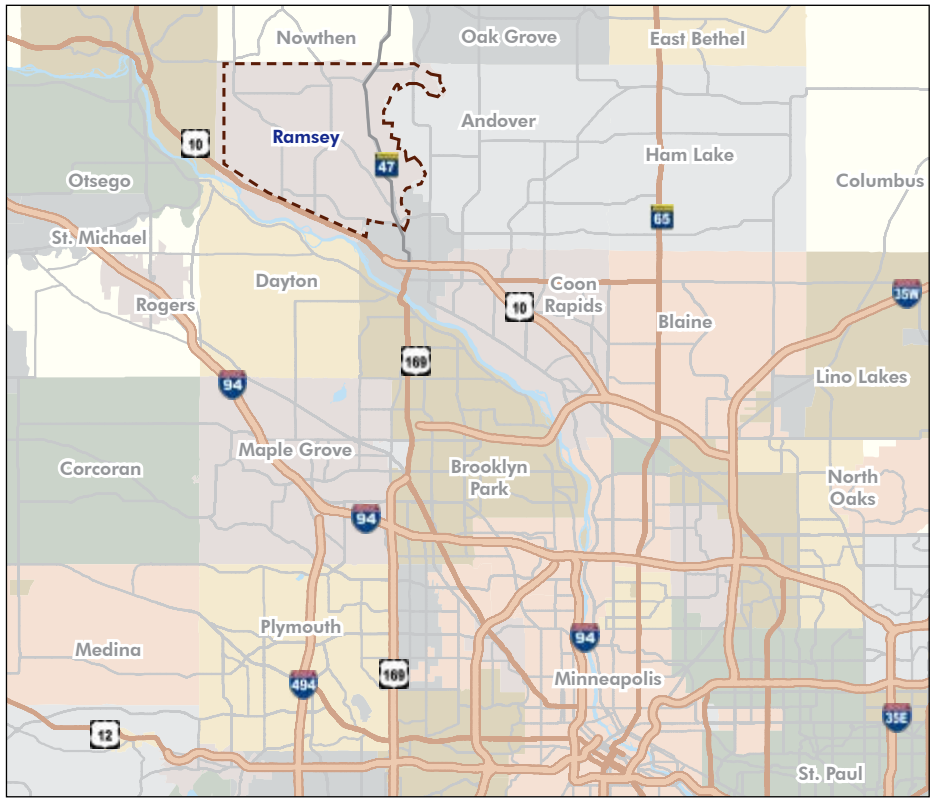
CITY OF RAMSEY OVERVIEW

Ramsey is a northwestern Twin Cities suburb in Anoka County with an estimated 2015 population of 25,580., and is the second-fastest growing city in Anoka County. It is 28 square miles with 15% wetlands, 565 acres park and open space, and bordered by the Rum and Mississippi Rivers. The City is also known for its unique COR development that encompasses over 400 acres of residential, commercial, retail, educational and recreational uses. The COR is the Twin Cities' first and only mixed-use development on the Northstar Commuter Line that services downtown Minneapolis, and offers a unique transit oriented development providing easy access to home, work, and neighborhood services. Highways 10/169 and 47 are two larger transportation routes.

As of the census of 2010, there were 23,668 people, 8,033 households, and 6,484 families residing in the city of Ramsey. The population density was 821.5 inhabitants per square mile (317.2/km2). There were 8,302 housing units at an average density of 288.2 per square mile (111.3/km2).

There were 8,033 households of which 43.9% had children under the age of 18 living with them, 67.6% were married couples living together, 8.5% had a female householder with no husband present, 4.6% had a male householder with no wife present, and 19.3% were non-families. 13.7% of all households were made up of individuals and 3% had someone living alone who was 65 years of age or older. The average household size was 2.95 and the average family size was 3.24.

The median age in the city was 34.9 years. 28.7% of residents were under the age of 18; 7.8% were between the ages of 18 and 24; 29.4% were from 25 to 44; 27.4% were from 45 to 64; and 6.7% were 65 years of age or older. The gender makeup of the city was 50.3% male and 49.7% female

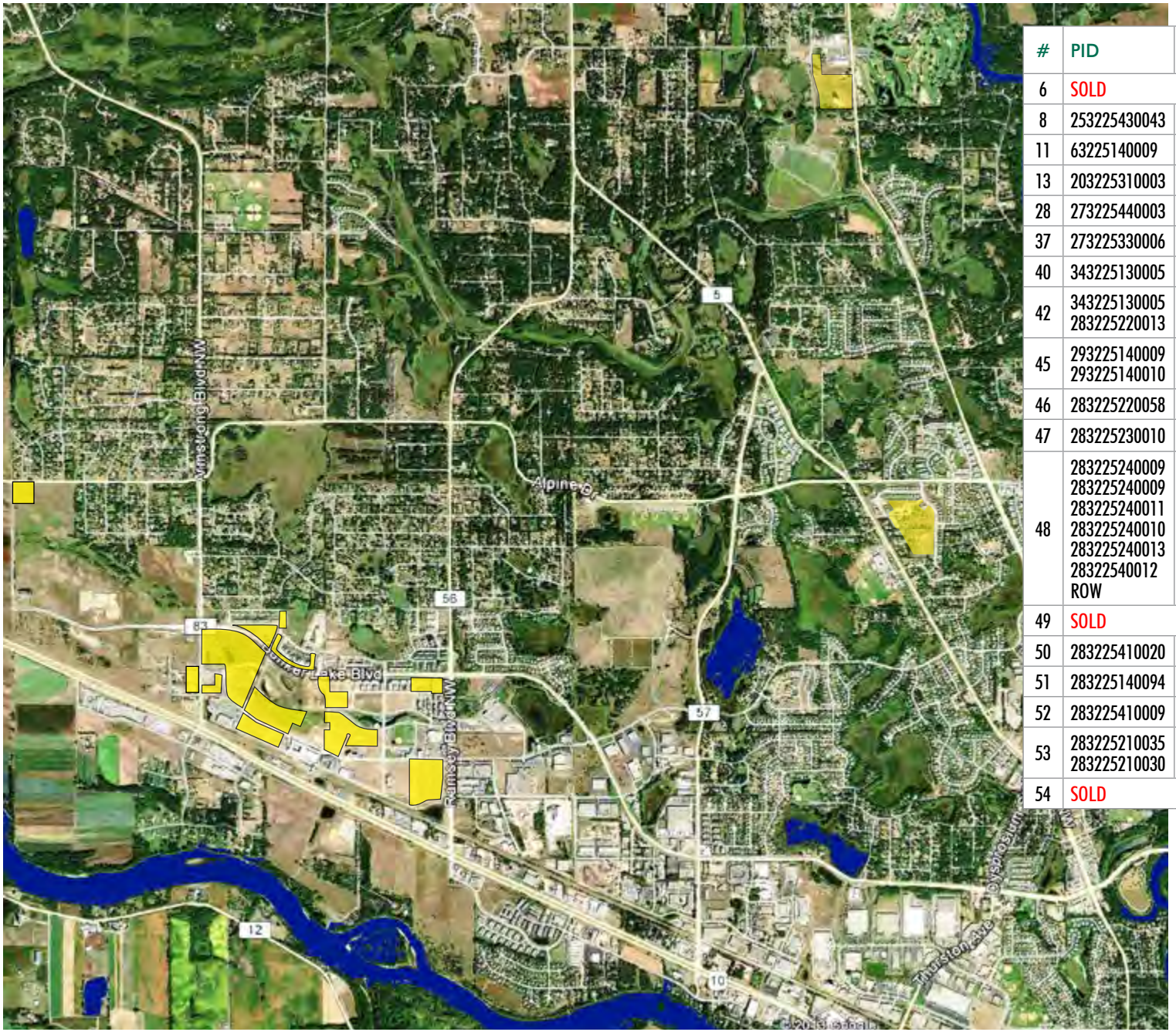


30 minutes to Downtown Minneapolis (±22 miles)

DEMOGRAPHICS, LIVABILITY, WORKFORCE

- 2015 Population 25,580
- Median Household Income: $83,115
- Anoka County Labor Force: 194,170
- Manufacturing hub: 33% of businesses in Ramsey; second highest percentage in Anoka County
- Nearly 1,300 businesses & non-profit organizations; more than 6,000 jobs
- Top Minneapolis Suburb for young couples (movoto.com, 2015)
- Home to the Game Fair, The Draw Event Series, and Happy Days
- 565 acres of parkland and extensive trail system
- 15% of Ramsey is protected wetland

PARCEL LISTINGS



#	PID	ACRES	LAND USE	LIST PRICE
6	SOLD			
8	253225430043	1.01	Commercial	$153,985
11	63225140009	6.75	Residential	$256,800
13	203225310003	4.11	Residential	$164,000
28	273225440003	0.95	Commercial	$82,764
37	273225330006	4.14	Office	$450,000
40	343225130005	1.23	Commercial	$215,000
42	343225130005 283225220013	2.61	Commercial	$1,365,000/$12 PSF
45	293225140009 293225140010	2.88	Mixed	$10/SF
46	283225220058	30.9	Commercial	$6,730,000
47	283225230010	4.94	Mixed	$1,075,932/$5 PSF
48	283225240009 283225240009 283225240011 283225240010 283225240013 28322540012 ROW	20.00	Mixed	$3,485,000
49	SOLD			
50	283225410020	13.34	Commercial	From $6 PSF
51	283225140094	4.30	Residential	$350,000
52	283225410009	4.96	Residential	$450,000
53	283225210035 283225210030	7.38	Residential	$210,000
54	SOLD			

Click on any numbered box to open the brochure for that parcel

THE CITY OF RAMSEY - FACTS

OVERVIEW

- Second-fastest growing City in Anoka County
- U.S. HWY 10, State Highway 169, State Highway 47 and Northstar Commuter Rail (linking to MSP) access
- Manufacturing hub (33% of businesses in Ramsey)
- Relevant, nearby, educational opportunities and workforce for manufacturing businesses
- Home to The COR, a new urban downtown development with direct access to the Northstar Commuter Rail
- Bordered by the Mississippi River, Rum River and Trott Brook, Ramsey is one of Minnesota's premier places to live



EDUCATION

- **Over 50 universities located** - within 50 miles
- **Anoka Technical College** - within 1 mile
- **PACT Charter School** - located on Ramsey Blvd & E Ramsey Pkwy, 600 current students and 2,000 on waiting list





HIGHLIGHTS

- **Coborn's Grocery Store** - anchors approximately 100,000 SF of retail in The COR and provides full service grocery, liquor, fuel and pharmacy.
- Northstar Station
- VA Clinic
- US Highway 10 - highest traveled road in the state
  - Ramsey Blvd @ Hwy 10: 44,000 VPD
  - Armstrong Blvd @ Hwy 10: 39,000 VPD

CITY and COUNTY CONTACTS

www.ci.ramsey.mn.us

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763 433 9845
kulrich@ci.ramsey.mn.us

Patrick Brama
Economic Development Manager
763 433 9868
pbrama@cityoframsey.com

Tim Gladhill
Community Development Director
763 433 9826
tgladhill@cityoframsey.com

THE CITY OF RAMSEY - CONSTRUCTION & HOUSING



	2008	2009	2010	2011	2012	2013	2014	2015
New APT	0	0	0	0	230	72	0	168
New TH	18	0	0	0	8	66	0	39
New SF	57	45	60	23	57	96	66	83

THE CITY OF RAMSEY - CONSTRUCTION & HOUSING

RESIDENTIAL DEVELOPMENT PATTERNS

2012, 295 total housing units
- Single Family, 57 units
- Townhomes, 8 units
- Multi Family, 230 units

2013, 234 total housing units
- Single Family, 96 units
- Townhomes, 66 units
- Multi Family, 72 units

2014, 66 total housing units
- Single Family, 66 units
- Townhomes, 0 units
- Multi Family, 0 units

2015, 290 total housing units
- Single Family, 83 units
- Townhomes, 39 units
- Multi Family, 168 units

MAJOR ACTIVE DEVELOPMENTS

- Single-family Construction – GS Land/ Harvest Estates PLAT, up to 44 lots located in east central Ramsey.
- Single-family Construction –Lennar Homes/ Woodlands PLAT, up to 85 lots located in central Ramsey.
- Townhome Construction –D.R. Horton/ The Station PLAT, up to 77 units located in The COR.







THE CITY OF RAMSEY - BUSINESS GROWTH

MANUFACTURING HOT SPOT

- Vision Ease Lens
- Connexus Energy
- Diamond Graphics Printing
- Cullinan Rigging & Erecting
- Life Fitness
- Ace Solid Waste

LABOR MARKET

- Anoka County Labor Force: 194,170
- Over 600 existing businesses and non-profit organizations in Ramsey
- **VA Clinic** - Opened in November 2011, the facility provides critical services to over 30,000 of our most honored citizens
- **Allina Clinic** - 30,000 square foot facility is the newest prototype in the Allina program featuring dominant architectural features; the general medicine facility also includes a sports medicine component

LARGEST EMPLOYERS	EMPLOYEES
Life Fitness	457
Vision Ease Lens	349
Connexus Energy	250
Anderson Dahlen Inc.	175
Zero Zone Inc.	174

BUSINESS PARKS

The City of Ramsey is proud to be a pro-economic development community. This is not only demonstrated by a rich history of successfully developing business parks, it is demonstrated by the commitment to the future of economic development within the community. The City has placed an emphasis on encouraging economic development within the Council strategic plans, EDA workplans, and Comprehensive Plan.

Both the City of Ramsey and the City of Anoka share a large business park spanning across 1,000 acres of land. This business park includes various office, warehouse, assembly, and a wide-variety of manufacturing users. Nearly 10,000 jobs have been created by this business park. The City of Ramsey and Anoka share a major economic engine that serves not only the Twin Cities, but also the national and global market place.

The City of Ramsey will consider moving forward with a new 93-acre greenfield business park located just northwest of the new full-access grade-separated Armstrong Boulevard/ U.S. Highway 10 Interchange in April 2016. The new business park has 25 acres of land shovel-ready today.





THE CITY OF RAMSEY - DEMOGRAPHICS

CBRE

DEMOGRAPHIC BRIEF

RAMSEY CITY CENTER

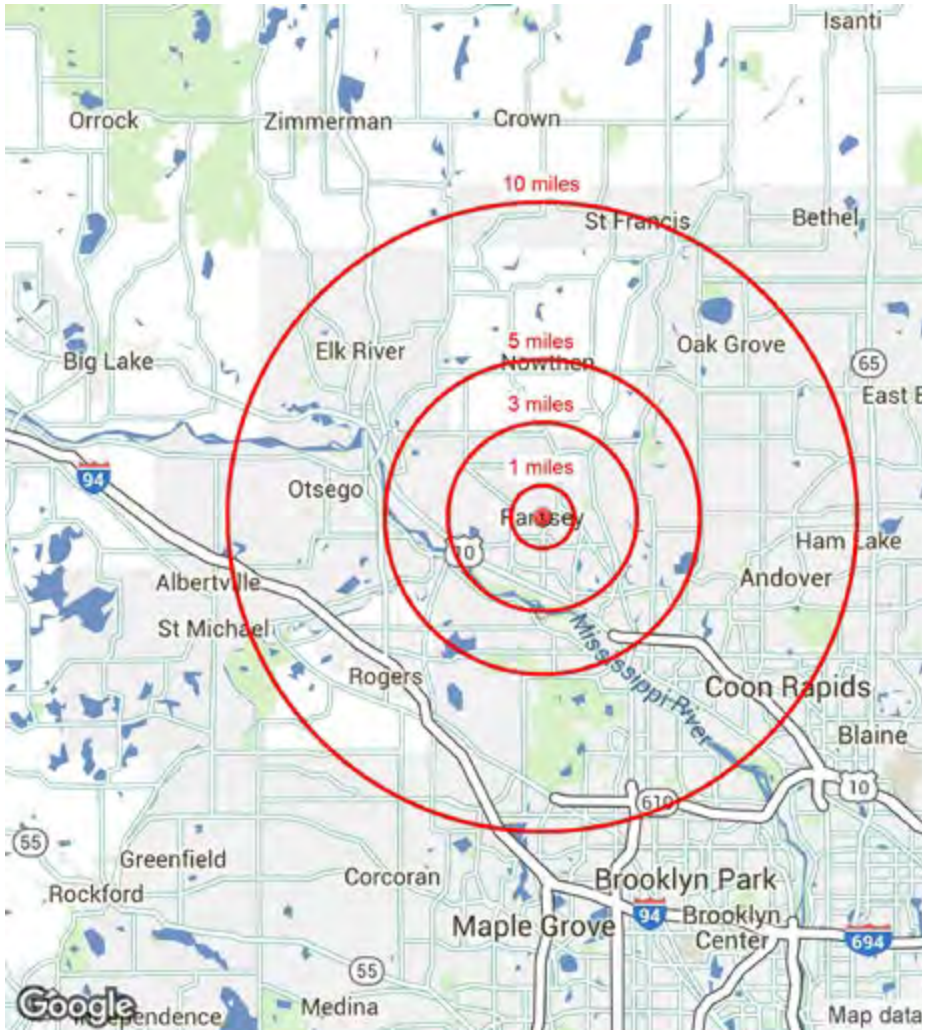
	1 Mile		3 Miles		5 Miles		10 Miles	
POPULATION								
2016 Population	2,493		23,952		50,866		252,652	
2021 Population	2,679		25,575		53,433		265,483	
2010 Population	2,259		21,908		47,789		236,800	
2000 Population	1,933		16,998		40,581		200,404	
Percent Pop Change: 2010 to 2016	10.4%		9.3%		6.4%		6.7%	
Percent Pop Change: 2016 to 2021	7.5%		6.8%		5.1%		5.1%	
AGE								
2016 Median Age	37.7		37.0		37.8		37.9	
2016 Average Age	37.5		36.6		37.5		37.5	
HOUSEHOLDS								
2016 Households	891		8,094		18,110		90,502	
2021 Households	969		8,687		19,114		95,240	
2010 Households	784		7,368		16,897		84,665	
2000 Households	626		5,373		13,501		68,453	
Percent HH Change: 2010 to 2016	13.5%		9.9%		7.2%		6.9%	
Percent HH Change: 2016 to 2021	8.8%		7.3%		5.5%		5.2%	
Average Household Size	2.8		2.9		2.8		2.8	
INCOME								
2016 Median Household Income	$78,781		$83,624		$79,169		$78,267	
2016 Average Household Income	$87,403		$95,434		$91,266		$92,347	
2016 Per Capita Income	$31,224		$32,251		$32,494		$33,079	
HOUSING UNITS								
2016 Housing Units	915		8,341		18,757		94,083	
2016 Occupied Housing Units	891		8,094		18,110		90,502	
2016 Vacant Housing Units	24		247		647		3,580	
2016 Owner-Occupied Housing Units	843		7,420		15,525		75,960	
2016 Renter-Occupied Housing Units	48		674		2,585		14,542	
EDUCATION								
2016 Population Age 25 and Over	1,667		15,545		33,618		166,878	
High School thru Associates	1,144	68.6%	10,387	66.8%	22,454	66.8%	107,522	64.4%
Bachelor's Degree	301	18.1%	3,238	20.8%	6,816	20.3%	36,265	21.7%
Graduate Degree	105	6.3%	1,075	6.9%	2,366	7.0%	14,266	8.5%
PLACE OF WORK								
Total Businesses	27		627		1,564		8,672	
Daytime Employment (Total Employees)	65		6,154		15,654		100,660	

©2016 CBRE. This information has been obtained from sources believed reliable. We have not verified it and make no guarantee, warranty or representation about it. Any projections, opinions, assumptions or estimates used are for example only and do not represent the current or future performance of the property. You and your advisors should conduct a careful, independent investigation of the property to determine to your satisfaction the suitability of the property for your needs. Source: Nielsen Page 1 ProjectID:81390

CBRE

DEMOGRAPHIC BRIEF

RAMSEY CITY CENTER



	Name	Latitude	Longitude
1	RAMSEY CITY CENTER	45.2611	-93.45

THE CITY OF RAMSEY - EDA FINANCING TOOLS

The City of Ramsey has a number of financial tools available for economic development projects. Below is an overview of common economic development tools.



GAP FINANCING

- Ramsey Revolving Loan Fund (RLF)
- Minnesota Investment Fund (MIF)

SBA FINANCING

- Small Business Administration (SBA) Loans
- Small Business Administration (SBA) Loan Guarantees

PROPERTY TAX PROGRAMS

- Tax Abatement
- Tax Increment Financing (TIF)

PRIMARY FINANCING

- Private Primary Lending Lender and/or Owner Equity (no involvement from city)
- Industrial Revenue Bonds (IRB)





DISCLOSURE

Eligibility for financing tools is based on the merit of an individual project, compliance with specific program requirements and in many cases approval from the Ramsey EDA and City Council. The City Ramsey targets quality projects with high quality job growth. Typically, projects will require owner equity and/or private financing.

THE CITY OF RAMSEY - THE COR

THE COR

The COR (Center of Ramsey) is the City of Ramsey's downtown development. This 400 acre development is a true, transit oriented and walkable, urban development. The COR is centered on U.S. Highway 10/ U.S. Highway 169 and the Northstar Rail (Ramsey Station). This mixed use development is home to a long list of successful projects including residential, retail, office, recreation, government facilities, and much more!

The COR, known formerly as Ramsey Town Center, was purchased by the City of Ramsey in 2009. About 130 acres of land is available for development in The COR today; about 90 acres is City-owned. Located directly adjacent to The COR is 90 acres of additional land available for commercial (retail) development.

RECENT MAJOR ACTIVITY

1. Rental apartments – 121 units of market rate apartments being developed by PSD LLC in The COR, near The Draw Park and Amphitheatre. Construction is underway, completion is anticipated for winter 2016.

2. Rental apartments - 47 units of workforce housing being developed by Common Bond Communities in The COR, near The Ramsey Northstar Commuter Rail Station. Construction is underway, completion is anticipated for fall 2016.

3. Casey's Convenience Store – 4,500 square foot convenience retail store completed by Casey's Retail Company, near Ramsey Boulevard/ Sunwood Drive. Construction is completed, operations began in January of 2016.

4. Quick Service Restaurant – 4,500 square foot restaurant to be developed by McDonald's USA LLC in The COR, near the new Armstrong Interchange. Construction anticipated for completion in 2017.

5. Armstrong Blvd Interchange – new full-access grade-separated interchange, intersection of U.S. Highway 10 and Armstrong Boulevard. Final completion set for summer 2016.

6. Townhomes – 15 units of town homes completed in 2016, 77 additional units under review for platting by D.R. Horton within The COR, near The Draw Park & Amphitheatre.

7. Renovation – Coborn's completed a half-million dollar remodel and upgrade to their convenience and liquor spaces in late 2015. Coborn's is 60,000 square

PRE-2015 COR PROJECTS INCLUDE:

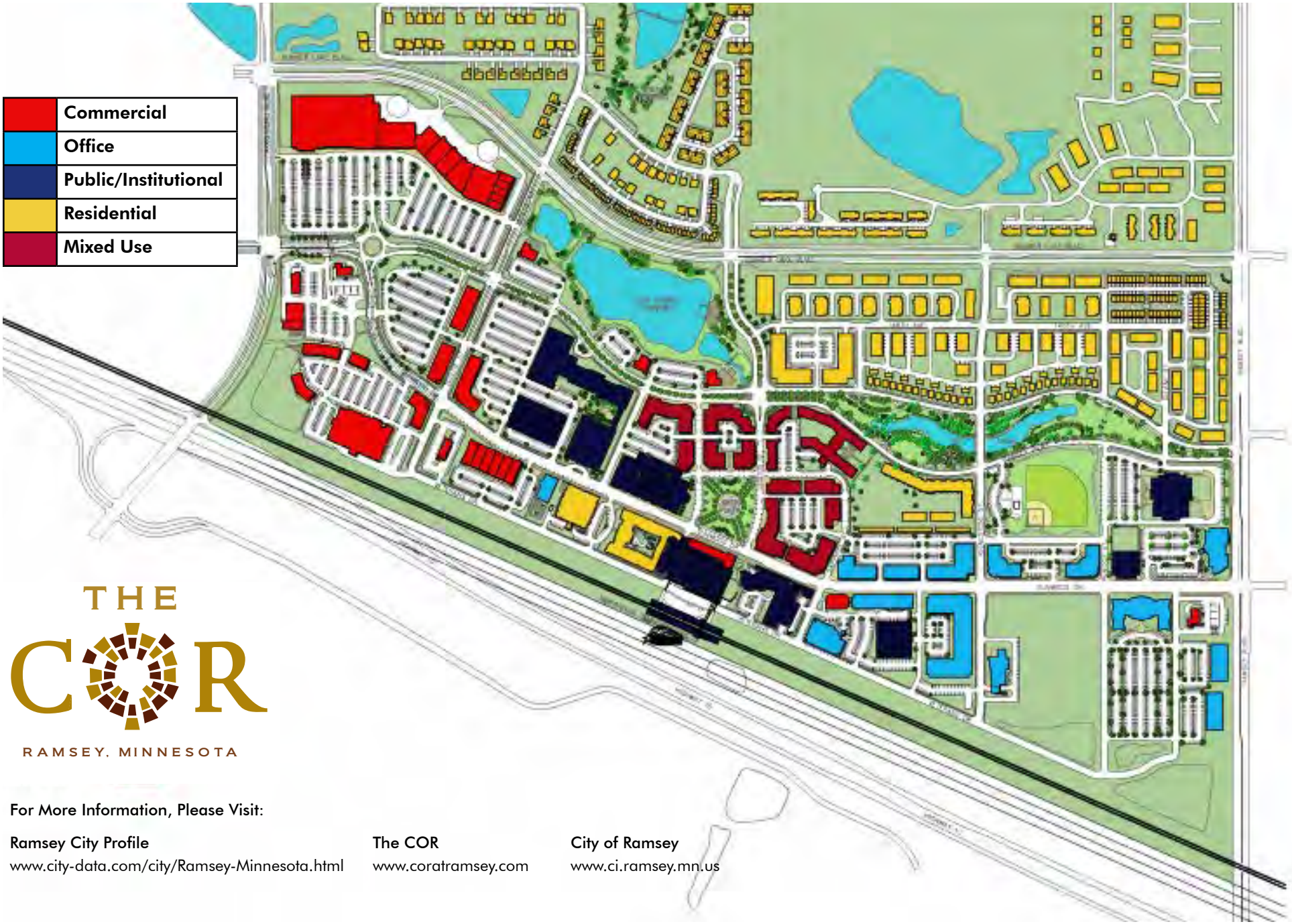
- 95,000 square foot Coborn's anchored multi-tenant retail center, over 90% occupancy
- PACT Charter School (K-12)
- Ramsey Municipal Center (60,000 square feet)
- Veterans Affairs Outpatient Clinic (40,000 square feet)
- Ramsey Office Plaza (80,000 square feet), over 90% occupancy
- Midwest Medical Examiner's Office
- NAU County Insurance Office (42,000 square feet)
- Northgate Church & Community Performing Arts Center (500 seats)
- Allina Medical Clinic (25,000 square feet)
- 230-unit luxury apartment complex (Residence at The COR)
- $3M The Draw park & amphitheater
- Ramsey Rail Station: connected to covered 800 stall parking ramp by skyway with service to Minneapolis
- Various single family and townhome developments totaling several hundred households







COR CONCEPT PLAN



THE COR

RAMSEY, MINNESOTA

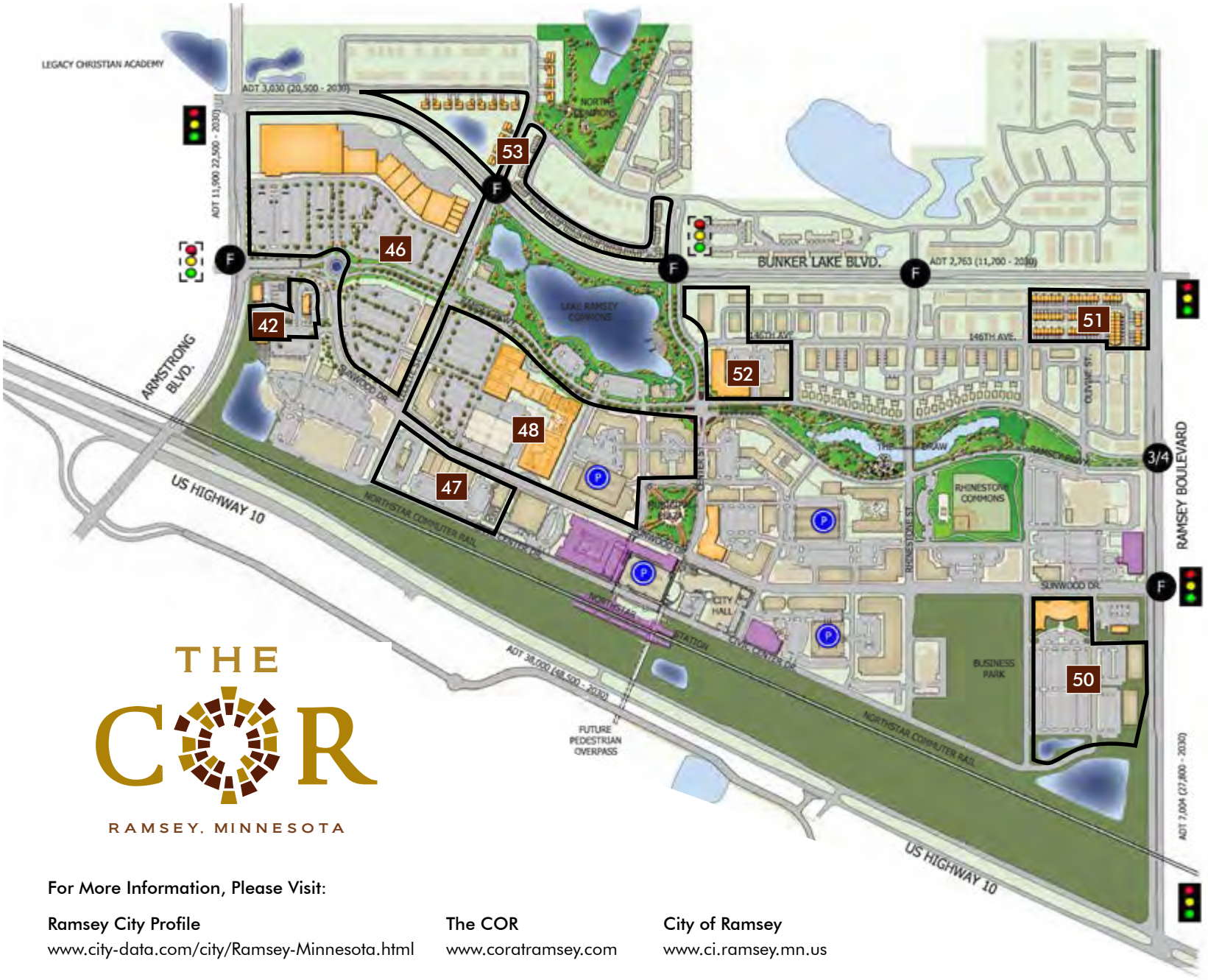
For More Information, Please Visit:

Ramsey City Profile
www.city-data.com/city/Ramsey-Minnesota.html

The COR
www.coratramsey.com

City of Ramsey
www.ci.ramsey.mn.us

COR - AVAILABLE PARCELS



Outlines show parcels for sale

THE COR

RAMSEY, MINNESOTA

For More Information, Please Visit:

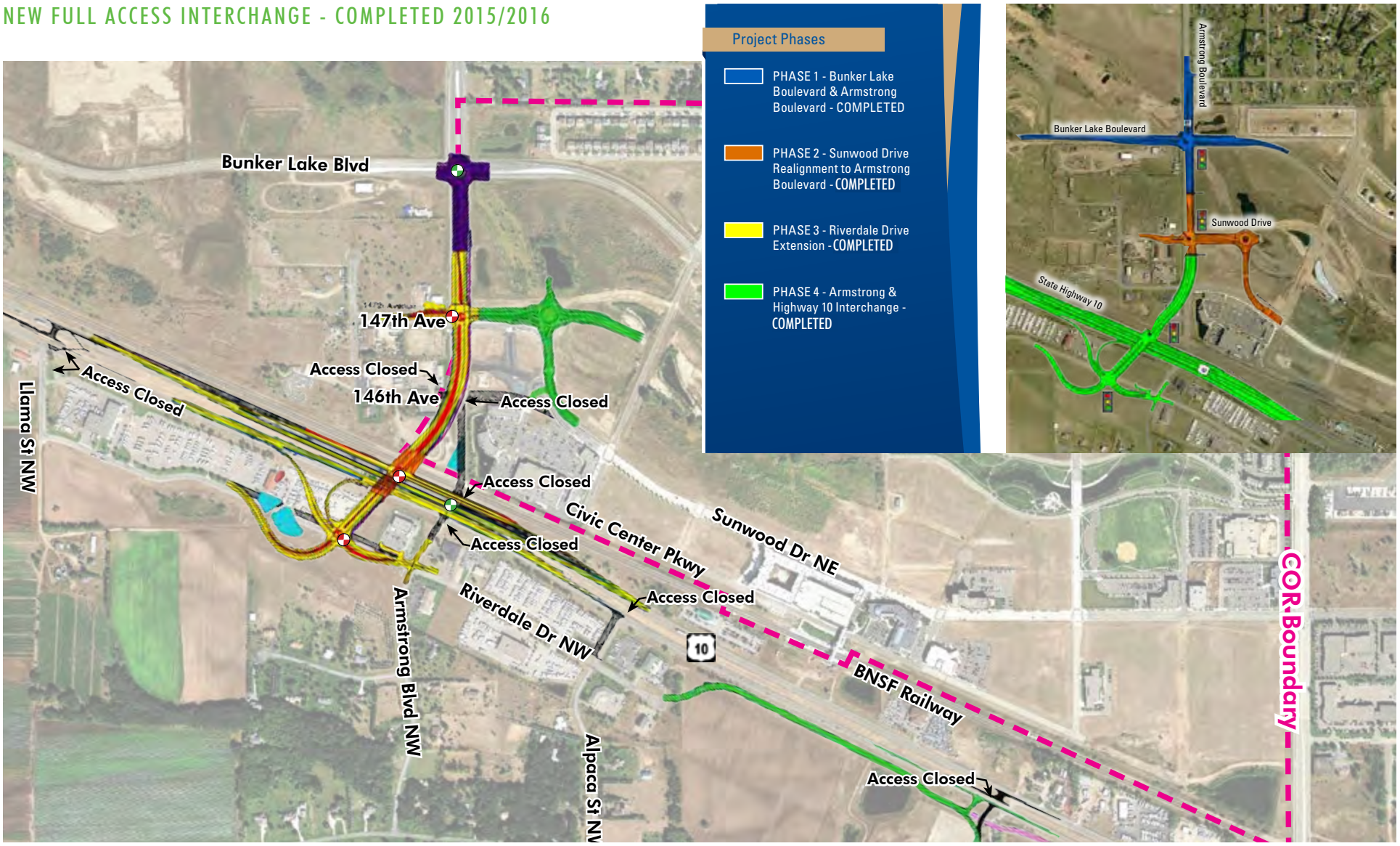
Ramsey City Profile
www.city-data.com/city/Ramsey-Minnesota.html

The COR
www.coratramsey.com

City of Ramsey
www.ci.ramsey.mn.us

HWY 10/ARMSTRONG BLVD REALIGNMENT

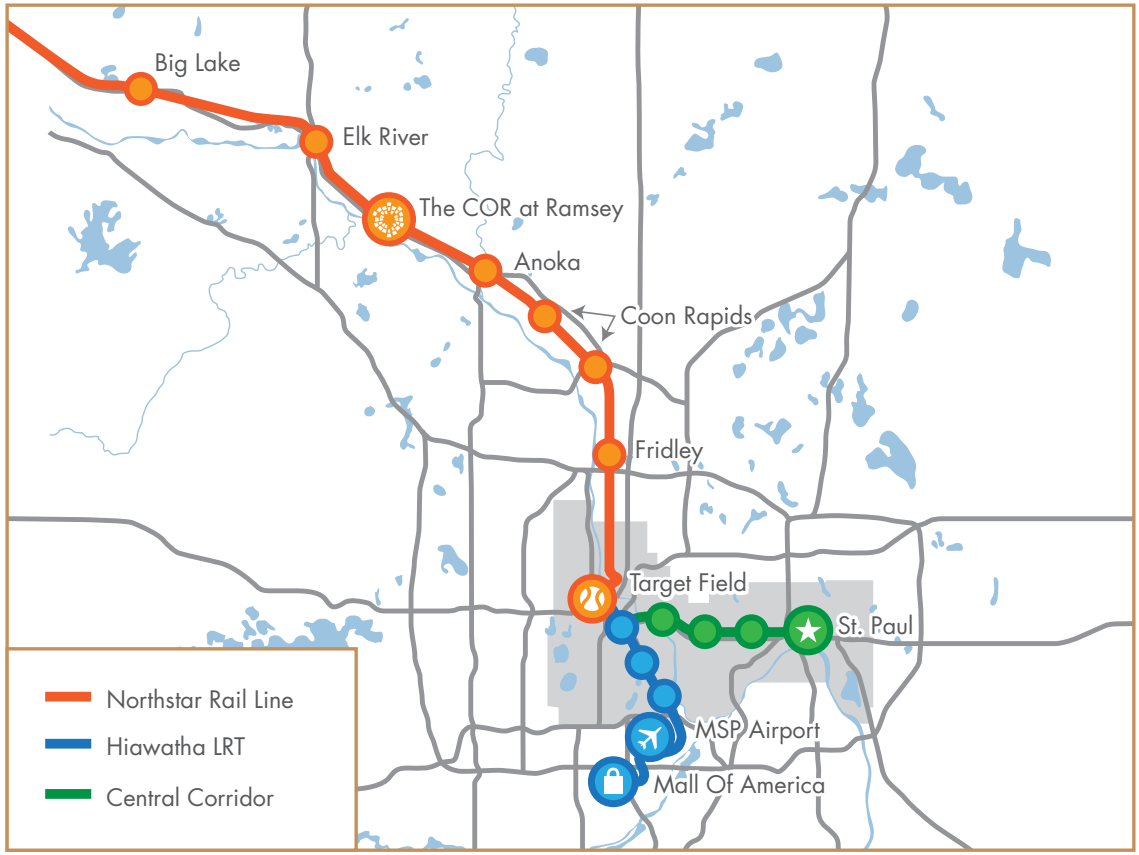
NEW FULL ACCESS INTERCHANGE - COMPLETED 2015/2016



ROAD CONSTRUCTION TIMING

Construction of the Armstrong Interchange has been completed. Additionally, there is a large Hwy 10 Access Planning Study under way to improve the safety and flow of Hwy 10. Hwy 10 is already a tremendous asset to the community but its positive impact will continue to grow with improvements to the corridor between Anoka, Ramsey and Elk River.

NORTHSTAR COMMUTER RAIL





STATION SPOTLIGHTS

The Ramsey Rail Station is now open and is the newest stop on the Northstar Commuter Rail. With safe, convenient, affordable and reliable transportation to downtown Minneapolis, and connections to the Airport and Mall of America, this regional transit solution is a critical part of the transit services provided in The COR. It's the only station connected by skyway to a public parking ramp and is located inthe center of The COR, Ramsey's new downtown development.

The $13 million Ramsey Station investment is leveraging $80 million in residential, retail and other investments in The COR. Rail service has also sparked new development around the station area, including the new Veterans Administration Clinic, Allina Medical Clinic, Falls Café, and Legacy Christian Academy.

Outside of downtown Minneapolis, seven stations are located along the 40-mile corridor: Target Field in Minneapolis, Fridley, Coon Rapids/Riverdale, Anoka, Ramsey, Elk River, and Big Lake. Another 3 stations are proposed in St. Cloud, Becker and Coon Rapids/Foley.



DAILY RIDERSHIP AVERAGES 2,539 RIDERS PER DAY WITH A TARGET OF 5,900 RIDERS PER DAY BY 2030.

www.metrotransit.org/northstar

For More Information, Please Contact:

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brian.pankratz@cbre.com

For More Information, Please Visit:

Ramsey City Profile
www.city-data.com/city/Ramsey-Minnesota.html

The COR
www.coratramsey.com

Northstar Commuter Rail Line
www.metrotransit.org/northstar

City of Ramsey
www.ci.ramsey.mn.us

AFFILIATED BUSINESS DISCLOSURE

CBRE, Inc. operates within a global family of companies with many subsidiaries and/or related entities (each an "Affiliate") engaging in a broad range of commercial real estate businesses including, but not limited to, brokerage services, property and facilities management, valuation, investment fund management and development. At times different Affiliates may represent various clients with competing interests in the same transaction. For example, this Memorandum may be received by our Affiliates, including CBRE Investors, Inc. or Trammell Crow Company. Those, or other, Affiliates may express an interest in the property described in this Memorandum (the "Property") may submit an offer to purchase the Property and may be the successful bidder for the Property. You hereby acknowledge that possibility and agree that neither CBRE, Inc. nor any involved Affiliate will have any obligation to disclose to you the involvement of any Affiliate in the sale or purchase of the Property. In all instances, however, CBRE, Inc. will act in the best interest of the client(s) it represents in the transaction described in this Memorandum and will not act in concert with or otherwise conduct its business in a way that benefits any Affiliate to the detriment of any other offeror or prospective offeror, but rather will conduct its business in a manner consistent with the law and any fiduciary duties owed to the client(s) it represents in the transaction described in this Memorandum.

CONFIDENTIALITY AGREEMENT

This is a confidential Memorandum intended solely for your limited use and benefit in determining whether you desire to express further interest in the acquisition of the Property.

This Memorandum contains selected information pertaining to the Property and does not purport to be a representation of the state of affairs of the Property or the owner of the Property (the "Owner"), to be all-inclusive or to contain all or part of the information which prospective investors may require to evaluate a purchase of real property. All financial projections and information are provided for general reference purposes only and are based on assumptions relating to the general economy, market conditions, competition and other factors beyond the control of the Owner and CBRE, Inc. Therefore, all projections, assumptions and other information provided and made herein are subject to material variation. All references to acreages, square footages, and other measurements are approximations. Additional information and an opportunity to inspect the Property will be made available to interested and qualified prospective purchasers. In this Memorandum, certain documents, including leases and other materials, are described in summary form. These summaries do not purport to be complete nor necessarily accurate descriptions of the full agreements referenced. Interested parties are expected to review all such summaries and other documents of whatever nature independently and not rely on the contents of this Memorandum in any manner.

Neither the Owner or CBRE, Inc, nor any of their respective directors, officers, Affiliates or representatives make any representation or warranty, expressed or implied, as to the accuracy or completeness of this Memorandum or any of its contents, and no legal commitment or obligation shall arise by reason of your receipt of this Memorandum or use of its contents; and you are to rely solely on your investigations and inspections of the Property in evaluating a possible purchase of the real property.

The Owner expressly reserved the right, at its sole discretion, to reject any or all expressions of interest or offers to purchase the Property, and/or to terminate discussions with any entity at any time with or without notice which may arise as a result of review of this Memorandum. The Owner shall have no legal commitment or obligation to any entity reviewing this Memorandum or making an offer to purchase the Property unless and until written agreement(s) for the purchase of the Property have been fully executed, delivered and approved by the Owner and any conditions to the Owner's obligations therein have been satisfied or waived.

By receipt of this Memorandum, you agree that this Memorandum and its contents are of a confidential nature, that you will hold and treat it in the strictest confidence and that you will not disclose this Memorandum or any of its contents to any other entity without the prior written authorization of the Owner or CBRE, Inc. You also agree that you will not use this Memorandum or any of its contents in any manner detrimental to the interest of the Owner or CBRE, Inc.

If after reviewing this Memorandum, you have no further interest in purchasing the Property, kindly return this Memorandum to CBRE, Inc.

CBRE

Economic Development Authority (EDA) **4. 4.**

Meeting Date: 12/14/2017

Submitted For: Patrick Brama, Administrative Services

By: Patrick Brama, Administrative Services

Title:

Buxton Group Opportunity

Purpose/Background:

As the EDA knows, the City is actively seeking retail/ restaurant users. In order to help achieve that goal, the EDA/Council have been discussing different strategies over the past year (brokers, developers, city, professional services firms, research groups, etc.).

Staff was approached by a research group recently (Buxton). Buxton met with staff on 10/11/17, and provided an overview of their service offerings. As the EDA may recall, the City utilized Buxton about 10 years ago for similar work.

In summary, Buxton has indicated their processes/ services have been improved/ changed. Not only will the provide all the data they did in the past (detailed demographics, consumer spending reports, and market maps), they now help cities actually make connections with end users (create custom demographic/data packages for specific end users, and set up initial contact with end users), and they allow their data to be displayed in an online dashboard that's available for existing Ramsey businesses. Please see attached for details. The cost for their services is $50K per year. At the November 09 EDA meeting, the EDA received a full/ formal presentation of the Buxton product. Please see minutes included this agenda for a recap.

The purpose of this case to check in with the EDA. Staff is not expecting/ recommending any direction from the EDA. If the EDA is interested in further exploring this opportunity, staff would be happy to take that direction. This opportunity would require a 3-year contract at $50,000 per year. The EDA has $25,000 available in their marketing budget for 2018.

Notification:

NA

Observations/Alternatives:

NA

Funding Source:

NA

Recommendation:

NA

Action:

The purpose of this case to check in with the EDA. Considering past in-depth discussions with EDA regarding this comprehensive subject (strategy for marketing city owned land), staff is not expecting/ recommending any direction from the EDA.

Attachments

Intro
Reports Guide
Pursuit Package Example
Case Study
Testimonials
Former Buxton Reports Combined (2008)

Form Review

Inbox	Reviewed By	Date
Kurt Ulrich	Kurt Ulrich	12/08/2017 11:41 AM
Form Started By: Patrick Brama		Started On: 11/10/2017 01:24 PM
Final Approval Date: 12/08/2017		

Retail Recruitment from the

Experts in Retail.



Buxton®



WE DRIVE RETAIL.

IT'S WHAT **WE** DO.

We are Buxton. We are the experts in driving retail growth. The more than 700 communities that have partnered with us have opened more than 40 million square feet of new retail space.

We use the same methodology used by leading retail and restaurant brands when making real estate growth decisions. The solution we deliver is exactly what a retailer wants and needs to see prior to making a real estate decision.



Retail Matches | Leakage Surplus Report | Healthcare Report | Drive Time Trade Area | Demographic Report

Buxton®



MOBILIZE

Access information using SCOUT. No matter where your work takes you, you'll be connected.

SCOUT IS YOUR **RETAIL RECRUITMENT** TOOL.

SCOUT clearly and simply illustrates your city's development potential based on customers, where they are located, and the value of those customers to a retail or restaurant concept. The SCOUT platform gives you access to the best retail and restaurant matches for your community.

"In our retail attraction efforts, the city of Bloomington uses the Buxton SCOUT program on a daily basis."

Bloomington ILLINOIS



"Buxton has been invaluable in marketing to interested businesses by showing them exactly how our trade area spends their money."

SCOUT.

ANSWERS AT THE TOUCH OF A BUTTON.

ANALYTICS

Analytics drive smart decisions. Easily understand your retail potential and quickly begin the recruitment process.

Buxton®

INVEST IN YOUR COMMUNITY.

We help you recruit new retailers to increase tax revenue, grow your local businesses and jump start your economic development efforts.

We assist city leaders with the data, insights and analytics necessary to craft a winning strategy for growth, bringing essential retail and services to your market and enhancing quality of life for your citizens.



CITY SERVICES

Apply analytics across your city services to optimize services at libraries, parks and recreation, emergency services and much more.

ECONOMIC DEVELOPMENT

We provide the tools you need to recruit retail and retain and grow local businesses.



HEALTHCARE NEEDS

Understand the gaps in supply and demand for major healthcare specialties in your community.

PLANNING INSIGHTS

As your city grows, understanding the shifts in your market is crucial. Our insights include new mover impact, life stages, race and ethnicity trends and much more.

VISITOR INSIGHTS

Identify the visitors coming to your city for events, cultural attractions, conventions and conferences so you can maximize budget dollars.

Buxton®

KNOW YOUR **POTENTIAL.**

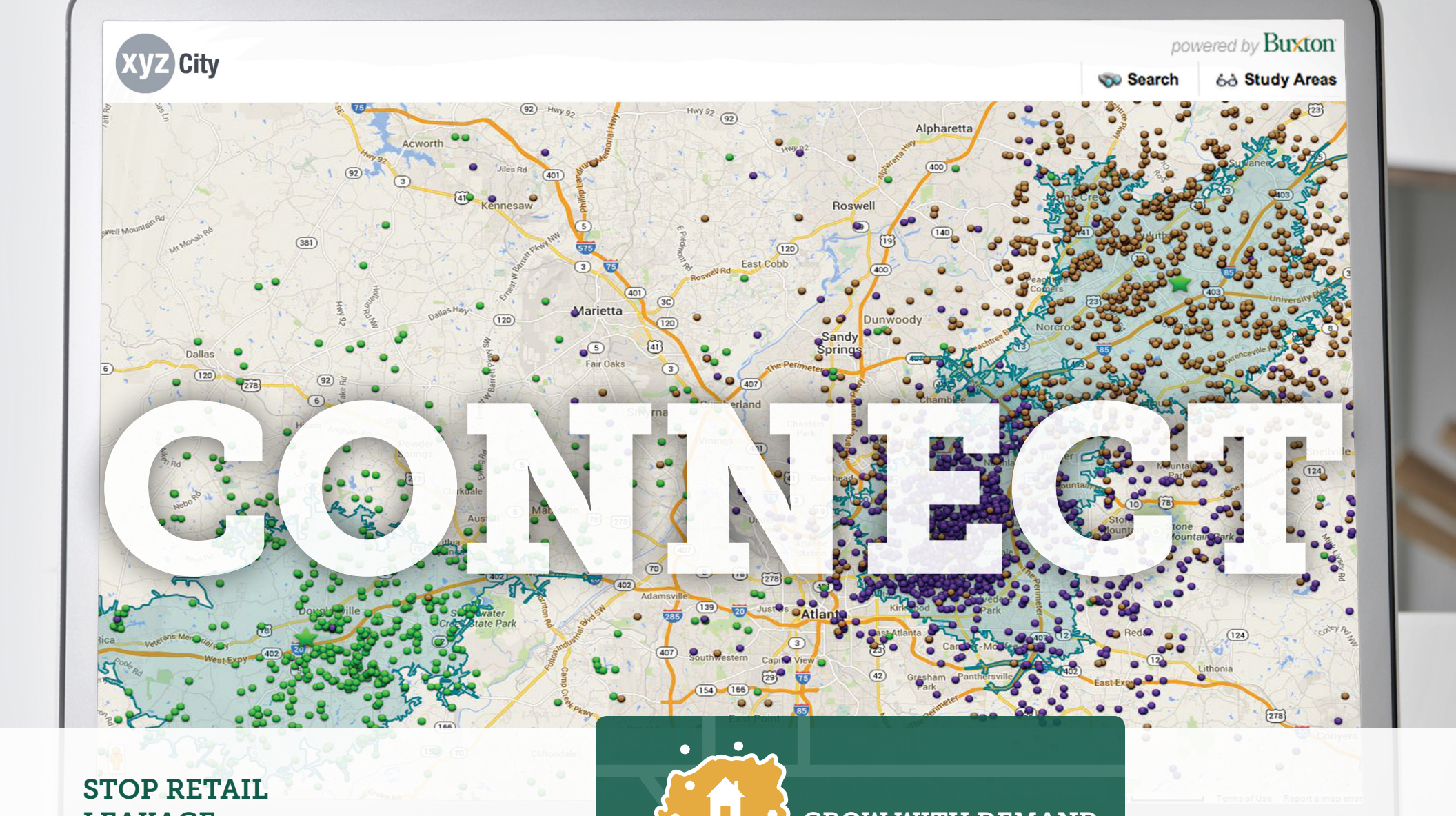
As your community grows, are you fully capturing the new citizens and households in your trade area? Census data and demographics alone don't tell the whole story. Our analysis takes your city to the next level of growth – fully preparing you to sell your city to potential retail and restaurant brands.

RETAIL MATCHING

With SCOUT you have access to your targeted retail matches, arming you with the marketing validation necessary for pursuit.

RETAIN AND SUPPORT LOCAL BUSINESSES

SCOUT gives local business owners instant access to business intelligence, giving them the data they need to be more competitive in the market.



STOP RETAIL LEAKAGE

Understand where you have gaps in the market and build a strategy to retain consumer dollars within your city limits.

GROW WITH DEMAND

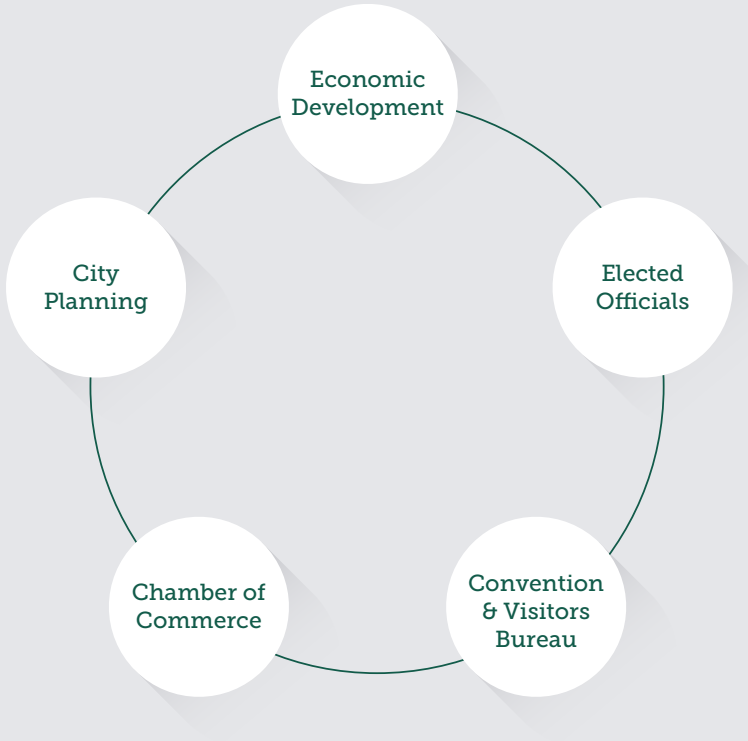
You will have the ability to truly communicate the demand for goods and services with accurate data and analytics.

Buxton


SCOUT
TOUCH
WHO
WHERE
VALUE

CONNECT YOUR CITY LEADERS.

SCOUT provides city leaders with a data-driven approach to city management, giving decision-makers the tools necessary to create and execute growth strategies.



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Buxton® REPORTS GUIDE



This document contains a comprehensive description of the reports contained within the SCOUT reporting suite. If you have any questions or would like further information, please contact your account manager or call the Buxton office at (817) 332-3681.

Report #1: Custom Variable Report (Demographic Report) 2

Report #2: Consumer Propensity Report 4

Report #3: Create Profiles Report 5

Report #4: Healthcare Report 6

Report #5: Physician's Intelligence Report 8

Report #6: Retail Leakage and Surplus Report 9

Report #7: Green Awareness Report 10

Report #8: Count Base Daytime Population Report (Workplace) 14



Report #1: Custom Variable Report (Demographic Report)

Outputs Available: PDF, Microsoft Excel, Microsoft Word

How to Use This Report:

Use this report to gain a foundational understanding of the consumers in a given trade area or geography. Demographic data is useful for gathering basic insights, but is strongest when coupled with additional reports (such as the Create Profiles Report).

Contents:

The Demographic Report contains a comprehensive review of all variables as measured by the U.S. Census. Current year and future year estimates are available based on forecasts.

There are numerous variations of this report containing different insights. Please see below for a brief description of each report type:

- **Age by Sex*:** Provides the user with a breakdown of the population by age and sex. Offers total population figures for several years and breaks this information down further by sex and age range.
- **Basic Demographic Chart*:** Provides the user with a breakdown in chart form of the population by general categories. These categories include households by income; household size; age, race and ethnicity percent change; educational attainment percent change; marital status; and household and population percent change.
- **Complete Demographic*:** Provides the user with a breakdown of the population by specific groups, for 2000 and 2010 census numbers, current year estimates, and 5-year projections. These categories include population demographics, population by race/ethnicity, population by age, median age, households by income, employment, housing units, vehicles available, marital status, and educational attainment.
- **Housing Units Summary:** Provides the user with a breakdown of households within a specified geography. Information contained in this report includes total number of housing units, owner vs. renter statistics, home value of owned homes, and monthly cash rent.
- **Income by Age Summary:** Provides the user with a breakdown of household demographics and income by age of head of household for the 2000 and 2010 censuses, current year estimates, and 5-year projections.
- **Income Report*:** Provides the user with a breakdown of population demographics and splits the households into groups by income for both the 2000 and 2010 censuses, current

year estimates, and 5-year projections.

- **Mosaic Comparison Summary:** Gives the user a population and percentage breakdown of the 71 segment groups found in Mosaic 71.
- **Mosaic Detail Charts:** Gives the user a demographic overview and a graph that visually shows the breakdown of the 20 Mosaic groups that are within the specified geography. This report also informs the user which group is dominant and sorts each group by percentage.
- **Population Comparison Report:** Gives the user the total population, female vs. male population, educational attainment, marital status, race, and Hispanic ethnicity as percentages. These numbers are based on 2000 & 2010 census data, current year estimates, and 5-year projections.

*These reports can be run as summary or comparison reports. The summary report allows you to see results for multiple geographic regions combined, or a single drive time or radius. The comparison report allows you to compare up to 5 geographies side-by-side in the same output.

Report #2: Consumer Propensity Report

Outputs Available: Microsoft Excel

How to Use This Report:

The Consumer Propensity Report is an excellent barometer for how the consumers of a given trade area are likely to consume goods and services or possess certain attitudes and opinions. The information contained in this report can help local business owners and store managers better optimize their merchandise/product offerings or their local marketing strategies.

Contents:

The Consumer Propensity Report contains measurements on the likelihood of residents or workers within the examined trade area to purchase various merchandise or to exhibit particular lifestyle traits. The measurement is based on an index score, in which a score of 100 represents an "average likelihood" for the consumers in the trade area to exhibit the given characteristic. Scores below 100 represent a "less likely than average" tendency to exhibit the characteristic, whereas those above 100 are "more likely than average."

The categories evaluated within this report are below:

- **Apparel**
- **Automotive**
- **Beverages - Alcoholic Drinks**
- **Beverages - Non-Alcoholic Drinks**
- **Cable/Television/Radio**
- **Cleaning Products**
- **Computers/Internet**
- **Dining**
- **Electronics**
- **Entertainment/Leisure**
- **Financial Services**
- **Food**
- **Food - Baking**
- **Food - Condiments**
- **Food - Dairy**
- **Food - Frozen**
- **Food - General**
- **Food - Meat**
- **Food - Snack/Dessert**
- **Health and Beauty Aids**
- **Home Furnishings & Appliances**
- **Home Improvement**
- **Household Products**
- **Lawn & Garden**
- **Lifestyle Statements**
- **Medicine/Drugs/Ailments**
- **Pets & Pet Food**
- **Print Media**
- **Shopping**
- **Spanish Language Media - Topline**
- **Telecom**
- **Tobacco**

Report #3: Create Profiles Report

Outputs Available: PDF, Microsoft Excel

How to Use This Report:

Generate a profile of a specific trade area in order to determine the likes/dislikes, spending behavior, and marketing preferences of the households and workers within that geography. This information can help you evaluate a market's retail potential or enhance marketing efforts.

Contents:

The Create Profiles Report identifies the quantity and percent makeup of the residential and workforce consumer base as defined by the Mosaic segments they belong to. There are 71 segments in total, and associated numerical statistics are provided alongside bar-chart visuals.

For further information on the individual Mosaic Segments, please cross-reference the online "Mosaic Guide:" **http://www.segmentationportal.com/us/**

Report #4: Healthcare Report

Outputs Available: PDF

Contents:

The Demographic Report contains a comprehensive review of all variables as measured by the U.S. Census. Current year and future year estimates are available based on forecasts.

There are numerous variations of this report containing different insights. Please see below for a brief description of each report type:

- **Major Diagnostic Codes:** This output measures healthcare demand based on the major diagnostic categories (MDC), which are determined by dividing all possible principal diagnoses into 25 mutually exclusive diagnosis areas. The diagnoses in each MDC correspond to a single organ system or causation and, in general, are associated with a particular medical specialty.
- **Cases by DRG:** This output measures healthcare demand based on diagnosis-related groups (DRG). DRG is a system used to classify hospital cases into one of 467 groups, with the 467th group being "ungroupable." This system of classification was developed with the intent to identify the "products" that a hospital provides. One example of a "product" is an appendectomy.
- **Physician Office Visits by Payment Source:** This output measures the estimated number of healthcare cases as it relates to the payment type used for the visit. The classifications included are:
  - Medicaid Insurance Visits
  - Medicare Insurance Visits
  - No Charge Visits
  - Other Payment for Visits
  - Private Insurance Paid Visits
  - Self-Pay Visits
  - Unknown Payment Visits
  - Workman Comp Insurance Visits

- **Physician Office Visits by Physician Setting:** This output measures the estimated number of healthcare cases received at specific physician settings. The settings quantified are:
  - Community Health Center
  - Family Planning Clinic
  - Faculty Practice Plan
  - Free Standing Clinic/Urgicenter (Non-Hospital)
  - Mental Health Center
  - Health Maintenance Organization (HMO) or Prepaid
  - Non-Federal Government Clinic
  - Private Solo or Group Practice
  - All Other

- **Physician Office Visits by Physician Specialty:** This output measures the estimated number of healthcare cases based on the type of physician specialty that provided the service. This report also includes insights on the specialty type (medical care, primary care, or surgical care visits). These physician specialties include:
  - Cardiovascular Disease
  - Dermatology
  - General Surgery
  - General and Family Medicine
  - Internal Medicine
  - Neurology
  - Obstetrics and Gynecology
  - Ophthalmology
  - Orthopedic Surgery
  - Otolaryngology
  - Pediatric
  - Psychiatry
  - Urology
  - All Other Visits

Report #5: Physician's Intelligence Report

Outputs Available: PDF, Microsoft Excel

How to Use This Report:

The Physician's Intelligence Report provides insight toward understanding the current supply of healthcare within a given market. This data can be used to determine whether there are gaps between the healthcare being provided and what the population needs.

Contents:

The Physician's Intelligence Report details the number of full-time equivalency hours (FTE's) at a given location within the examined trade area. An FTE of 1.00 indicates that there is 1 full-time employed individual at the location. An FTE of 0.5 would indicate a physician is only practicing at the location for half of his or her time. There are four types of outputs available for this report:

- **Physician Count by Practice:** This output measures the number of FTE's based on the observed physician practices, offices, or hospitals within the trade area.
- **Physician Count by Specialty:** This output measures the number of FTE's based on the specialties of the physicians practicing in the trade area. Specialty and major specialty categories are included.
- **Physician Export:** This output compiles a report detailing the practices within the measured trade area. The report provides detailed address information.
- **Dentist Export:** This output compiles a report detailing the dental practices within the measured trade area. The report provides detailed address information.

Report #6: Retail Leakage and Surplus Report

Outputs Available: PDF

How to Use This Report:

The Retail Leakage and Surplus Report examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities, but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or a "supply and demand analysis" and can aid in the following:

- **Indicating how well the retail needs of local residents are being met**
- **Uncovering unmet demand and possible opportunities**
- **Understanding the strengths and weaknesses of the local retail sector**
- **Measuring the difference between actual and potential retail sales**

Contents:

The Retail Leakage and Surplus Report contain visual and statistical representations of the potential surplus or leakage in a trade area. These figures are based on the ratio of estimated sales potential to estimated actual sales for a given retail category. Information on the following general retail categories is presented, but more specific retail categories are described within the report itself:

- **Motor Vehicle Parts & Dealers** (3 Subcategories)
- **Furniture & Home Furnishing Stores** (2 Subcategories)
- **Electronics & Appliance Stores** (3 Subcategories)
- **Building Material & Garden Equipment & Supply Dealers** (6 Subcategories)
- **Food & Beverage Stores** (4 Subcategories)
- **Health & Personal Care Stores** (4 Subcategories)
- **Clothing & Clothing Accessory Stores** (9 Subcategories)
- **Sporting Goods, Hobby, Book & Music Stores** (6 Subcategories)
- **General Merchandise Stores**
- **Miscellaneous Store Retailers** (5 Subcategories)
- **Foodservice & Drinking Places** (3 Subcategories)

The retail categories contained in the report are defined by the North American Industry Classification System (NAICS). For more information on NAICS, please visit the NAICS Association Website: **http://www.naics.com**

Report #7: Green Awareness Report

How to Use This Report:

This report can be used as a directional gauge regarding a population's reception of a city service like an enhanced recycling program. A business could also use this data to effectively target a marketing program and improve the quality of its mix of goods and services as it caters to the various "Green Segments."

Contents:

The Green Awareness Report contains summary statistics on the percent makeup of both residents and workers within a given trade area as defined by four "Green Segments." Benchmarks for the U.S., region, and state are included.

The four "Green Segments" are explained below:

- **Behavioral Green:** This segment comprises approximately 62 million Americans who think and act "Green," hold negative attitudes toward products that pollute, incorporate Green practices regularly and include Green as one of their purchasing criteria. A portion of purchases typically go toward environmental causes, and they are likely to buy from eco-friendly companies.

  Behavioral Greens tend to be optimistic and have traditional values. They are concerned about their own health while balancing career and personal interests. Family is important to them, but their children are out of the house so they focus on relaxing and maintaining healthy lifestyles. Some Behavioral Greens are entering retirement and enjoying a new chapter in life.

  Segment Snapshot:

  - Mature adults and retirees
  - College graduates or higher degrees
  - Above-average incomes
  - Typically own their homes
  - Liberal
  - Shopping behavior - brand loyalists, knowledgeable consumers and approval seekers

  How to Reach Them: This group tends to be more receptive to traditional advertising than any of the other GreenAware™ segments. Behavioral Greens maintain that they remember ads when shopping, that advertising can help them learn about available products and that they expect advertising to be interesting.

- **Think Green:** This segment is concerned about the future of the environment and over the past three years the number of Think Greens, consumers who think Green but do not necessarily act Green, has increased by more than 4 million. This consumer group consists of 48 million adults and represents 22 percent of the total adult population - or twice the market share of True Browns, the least environmentally conscious and most distrustful of Green causes.

  Think Greens have an active role in their health, trying to stay active and eat healthy. Home is important to them; they like to make their place homey and spend time decorating and remodeling. Their children are grown up so they have more free time to pursue their interests. They like to travel and continue learning.

  Segment Snapshot:

  - Established and mid-life adults
  - College graduates or higher degrees
  - High incomes
  - Typically married
  - Likely to own their homes
  - Liberal or conservative
  - Shopping behavior - brand loyalists and informed consumerss

  How to Reach Them: In reaching out to Think Green consumers, marketers are best served by a strategy that contains a strong educational component. Providing information to these people while they are still early in the evaluation process is more likely to yield brand loyalty when they move to the purchase phase. Traditional media outlets such as direct marketing will fulfill a Think Green's desire to understand.

- **Potential Green:** This segment neither thinks nor behaves along particularly environmentally conscious lines. However, 71 percent of them express concern over the future of our environment. Over the past three years, the number of Potential Greens has decreased by more than 14 million, yet this is the largest of the four segments. This consumer group consists of 71 million adults and represents 36 percent of the total adult population.

  The Potential Greens segment is also the youngest GreenAware™ group. They are still into self-discovery. Always on the go, they multitask, are busy with life and like to be up-to-date. They are tech-savvy and always looking for the next upgrade. This is a perfect group for marketers to "show the way" to become Green.

  Segment Snapshot:

  - Mainly young, diverse adults
  - Education ranges from high school through some college
  - Below-average incomes
  - Typically single or divorced
  - Likely to rent
  - Shopping behavior - up-to-date with the latest electronic products

  How to Reach Them: Get your message to Potential Greens via traditional advertising, such as direct mail, periodicals, radio and transit.

- **True Brown:** This consumer segment is not environmentally conscious and may in fact have negative attitudes about the Green movement. True Browns represent an opportunity for marketers. Those who know how to connect with True Browns today are more likely to foster long-term relationships with these consumers. Then, as True Browns migrate to the environmentally friendly segments, marketers will benefit from enhanced brand loyalty and support.

  True Browns are ambitious and status-driven adults who value entertainment and social life. Self-confident, they value individualism and self-discovery. They also have to make decisions quickly and prefer everything to be accessible, quick and easy. Interestingly, 60 percent of them express concern about the future of our environment.

  The True Brown consumer group consists of 34 million people and represents 11 percent of the total adult population. It is the smallest of the four segments, and there is a declining trend, indicating that consumers in this group are moving into one of the other three environmental segments as ecological consciousness grows.

  Segment Snapshot:

  - Mainly young, established adults
  - Education ranges from high school through postgraduate studies
  - High incomes
  - Typically single or married
  - Likely to own their homes
  - Conservative
  - Shopping behavior - impulse shoppers

  How to Reach Them: Marketers who desire to reach True Brown consumers will be best served by presenting their cases with a quick, easy and accessible approach. Product and service information should offer unambiguous, concise calls to action. Marketers also should consider using multiple media channels to influence a True Brown.

  Source: http://www.experian.com/small-business/green-consumer.jsp

Report #8: Count Base Daytime Population Report (Workplace)

Outputs Available: Microsoft Excel

How to Use This Report:

This report allows you to gain insights about how the population in the trade area differs during work hours so local businesses can cater to different types of workers.

Contents:

The Daytime Population Report looks at the workforce in the study area and provides a count of the workforce population by industry. It also allows you to see a count of businesses in the area by two digit SIC and workforce size.

The industry categories included within this report are listed below:

- **Management**
- **Business and financial operations**
- **Computer and mathematical**
- **Architecture and engineering**
- **Life, physical, and social science**
- **Community and social services**
- **Legal**
- **Education, training, and library**
- **Arts, design, entertainment, sports, and media**
- **Healthcare practitioner and technical**
- **Healthcare support**
- **Personal care and service**
- **Fire fighting and prevention, other protective services**
- **Law enforcement workers, including supervisors**
- **Food preparation and service related**
- **Building and grounds cleaning and maintenance**
- **Sales and related**
- **Office and administrative support**
- **Farming, fishing, and forestry**
- **Construction, extraction, maintenance, and repair**
- **Production, transportation, and material moving**

xyz City

Anywhere, USA

As A Location For

XYZ Retailer

Buxton

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Executive Summary

On behalf of the XYZ City, Buxton has conducted a study to determine the viability of a site as a potential location for XYZ Retailer. Buxton, based in Fort Worth, Texas, is a leading retail site location firm with clients including Red Wing Shoes, Sally Beauty Supply, GNC and Anthropologie, as well as many other national retailers and restaurants.

This report is intended to demonstrate the viability of Anywhere as a location for consideration by XYZ Retailer. Further, it is meant to serve as a foundation for discussion between representatives of the XYZ City and XYZ Retailer.

Determination of Anywhere's Potential as a Location for XYZ Retailer

Buxton assessed five key groups of variables pertinent for retail site selection in markets where XYZ Retailer currently has locations and compared the results with characteristics present in the study site's retail trade area. This allows Buxton to qualify XYZ Retailer as a match.

The five groups of variables mentioned are as follows:

- **Customer Presence** - this metric identifies if there is a high presence of XYZ Retailer preferred customers living and working within the trade area.
- **Demographic** - highly specific demographic information pertaining to XYZ Retailer's concept is evaluated to ensure the best type of customer is present in the trade area.
- **Competitive Presence** - businesses of similar concept to XYZ Retailer are considered competitors and evaluated in terms of proximity and market share.
- **Area Draw** - proximity to factors within a marketplace known to cause increased traffic volumes are measured. These include but are not limited to Large Retail Centers, Healthcare Facilities, Universities, Schools, etc.
- **Accessibility** - the trade area and proposed retail site are evaluated for known road size, traffic volumes, and proximity to major thoroughfares.

Based on the results comparing the trade area of the potential site with XYZ Retailer's existing store network, this site is well situated to provide an opportunity for XYZ Retailer's expansion plans.

This report encapsulates the results of Buxton's analysis and details the potential for XYZ Retailer to establish a successful location in Anywhere.

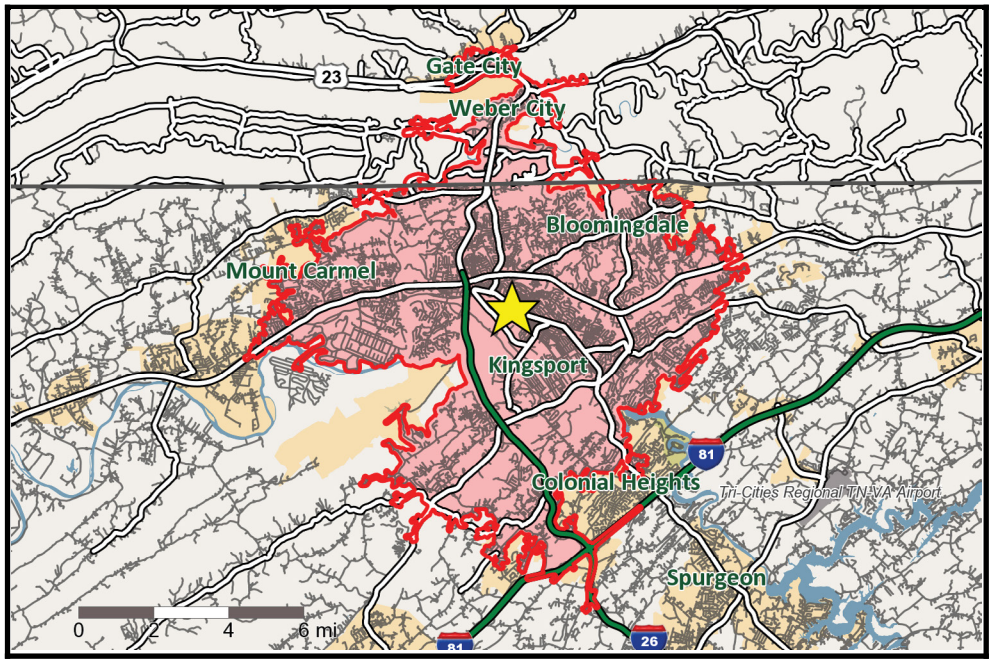
For additional questions pertaining to the contents of this report, or for more information about the site analyzed, please contact:

John Doe
City Manager- XYZ City
817.123.4567
jdoe@xyzcity.gov

XYZ City

XYZ Retailer

Site Address: 123 Main Street, Anywhere, USA
Latitude: 36.546748
Longitude: -82.560034
BUDS: Suburban (3)
Trade Area: 15 Minutes



Proposed Retail Site | 15 Minute Trade Area | Existing Location

Trade Area Snapshot

Population (Pop): 70,939
Workplace Pop: 47,325

Households (HH): 31,109
Median HH Income: $36,514

Pop Growth ('00 - '10): 1.8%
Proj Growth ('13 - '18): 0.1%

HH Growth ('00 - '10): 2.9%
Proj Growth ('13 - '18): 1.1%

Median Age: 43.8
Per Capita Income: $23,101

Proposed Site Scores

Address	City	State	Customer	Demographic	Competition	Area Draw	Accessibility
XYZ City	XYZ City	USA	102	87	118	108	119

Scores Of Most Comparable XYZ Retailer Locations

Address	City	State	Customer	Demographic	Competition	Area Draw	Accessibility
1300 CENTRAL PARK BLVD	FREDERICKSBURG	VA	96	99	153	96	119
407 W COLISEUM BLVD	FORT WAYNE	IN	100	103	190	123	121
5300 RIVERSIDE DR	CLEVELAND	OH	97	94	161	97	88
5935 CANAL RD	VALLEY VIEW	OH	97	93	177	119	82
3220 MID AMERICA DR	COUNCIL BLUFFS	IA	99	93	105	88	72
5150 LIBERTY AVE	VERMILION	OH	97	96	90	107	125

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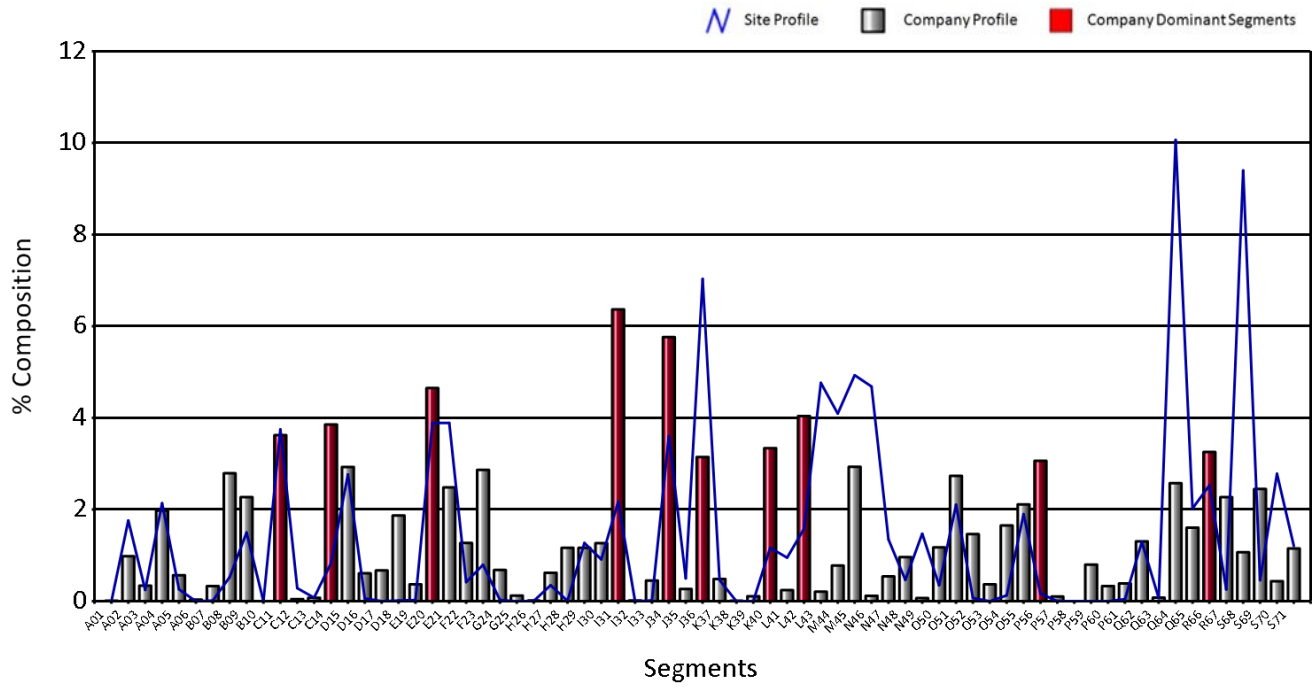
Customer Psychographic Representation

Every US household is classified into one of 71 distinct segments described by that household's lifestyle and spending habits. Segments found within the potential site's trade area are compared to the segments found within the trade areas of XYZ Retailer locations of similar markets to the study site.

Any segment that represents at least 3 percent of a retailer's average profile is considered a dominant segment. These are the most represented households within the average XYZ Retailer trade area.

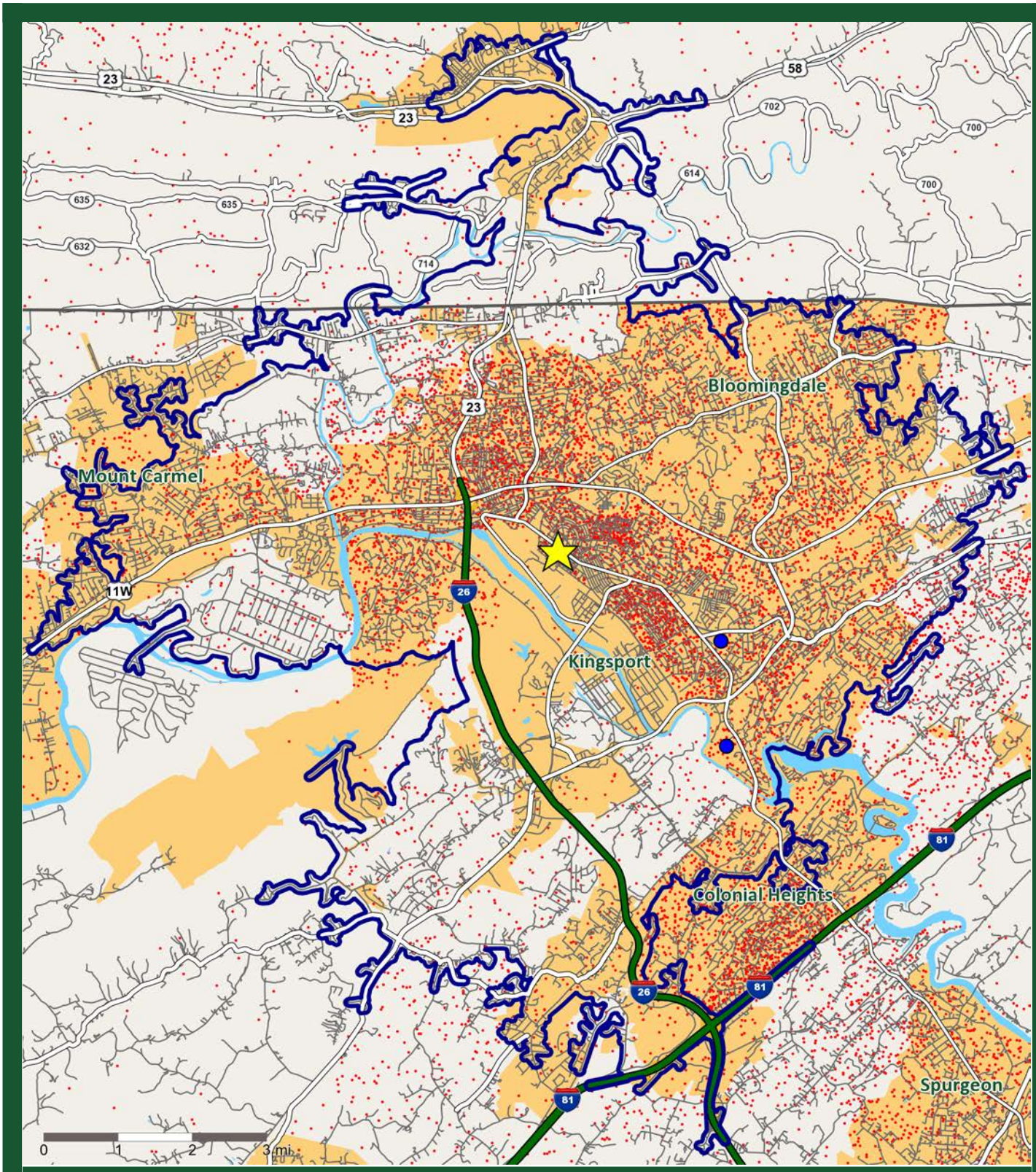
For more information regarding Mosaic Segmentation, please visit:
www.experian.com/marketing-services/consumer-segmentation.html

Segmentation Profile (15 Minute Drive Time)



Trade Area Comparison (15 Minute Drive Time)

	XYZ Retailer Average Trade Area	Anywhere, USA Site Trade Area
Total Households	86,838	31,109
Total Population	215,319	70,939
Core Dominant Segments	38,751	8,317



Anywhere, USA: XYZ Retailer Dominant Segment Density

xyz City

Retail Centers
GLA in thousands
800+
400 to 800

Proposed Retail Location

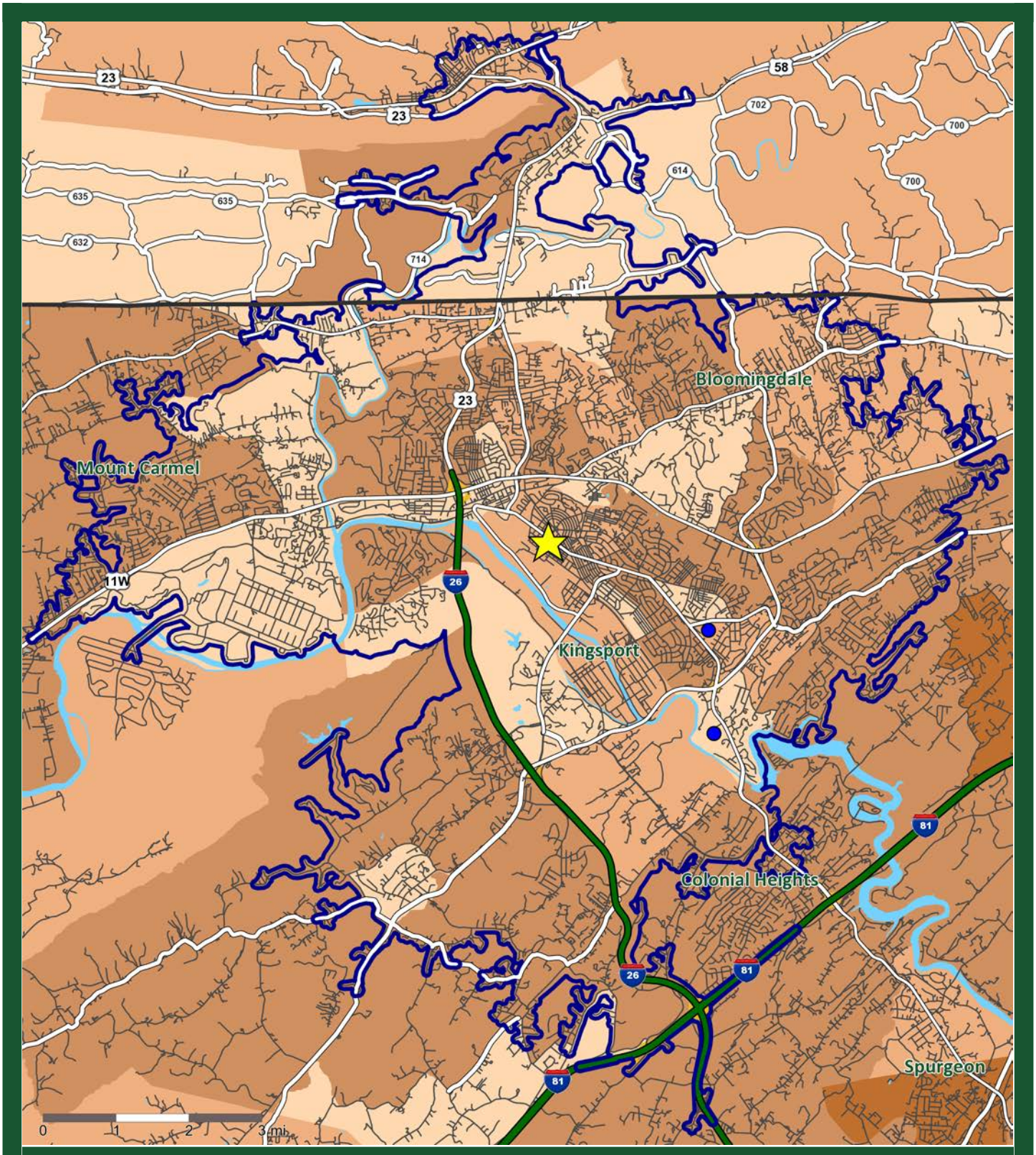
15 Minute Trade Area

Dominant Segment Households
1 Dot = 1 Household

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Anywhere, USA: Population

xyz City

Retail Centers
GLA in thousands
- 800+
- 400 to 800

Proposed Retail Location

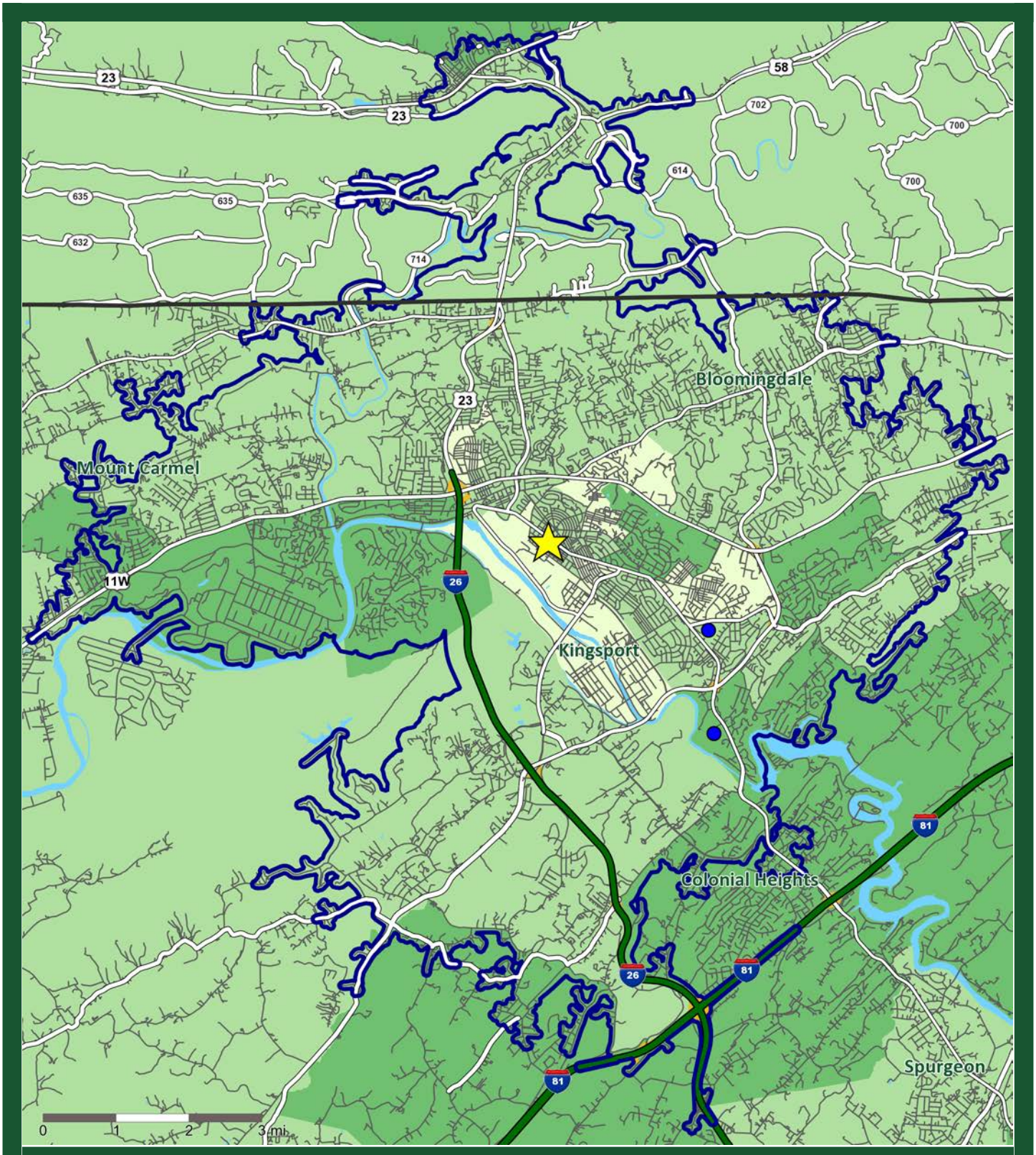
15 Minute Trade Area

Estimated Population (2013)
By Block Group
- 5,000 and Above
- 3,000 to 5,000
- 1,500 to 3,000
- 1,000 to 1,500
- 1,000 and Below

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Anywhere, USA: Household Income

xyz City

Retail Centers
GLA in thousands
- 800+
- 400 to 800

Proposed Retail Location

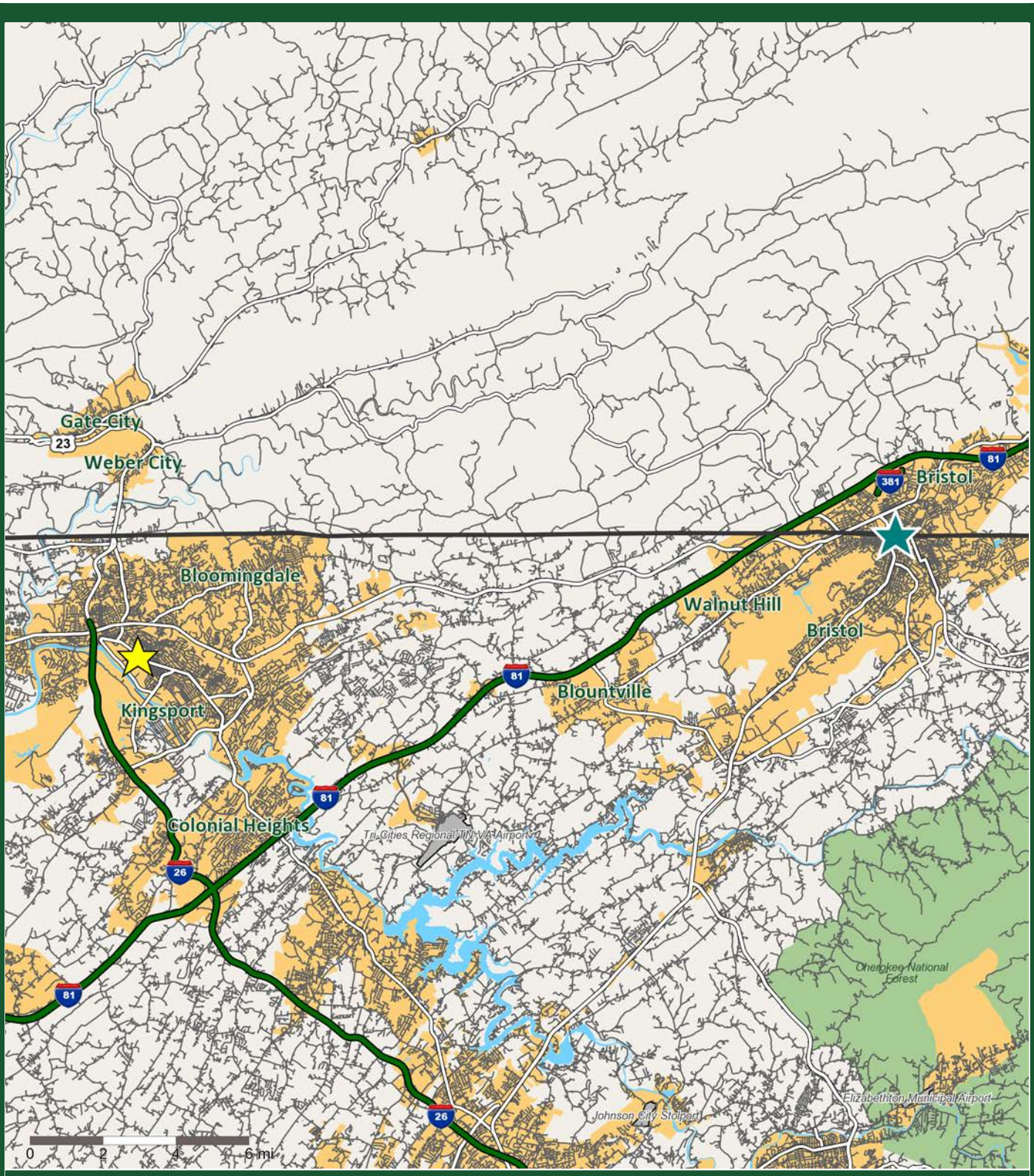
15 Minute Trade Area

Median Household Income
By Block Group
- $200,000 and Above
- $100,000 to $200,000
- $50,000 to $100,000
- $25,000 to $50,000
- $25,000 and Below

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Anywhere, USA: Nearest Existing XYZ Retailer

xyz City

Proposed Retail Location

Nearest Existing Location

Other Existing Location

Nearest Existing:

629 STATE ST,

BRISTOL, VA 42401

27.4 miles (drive distance)

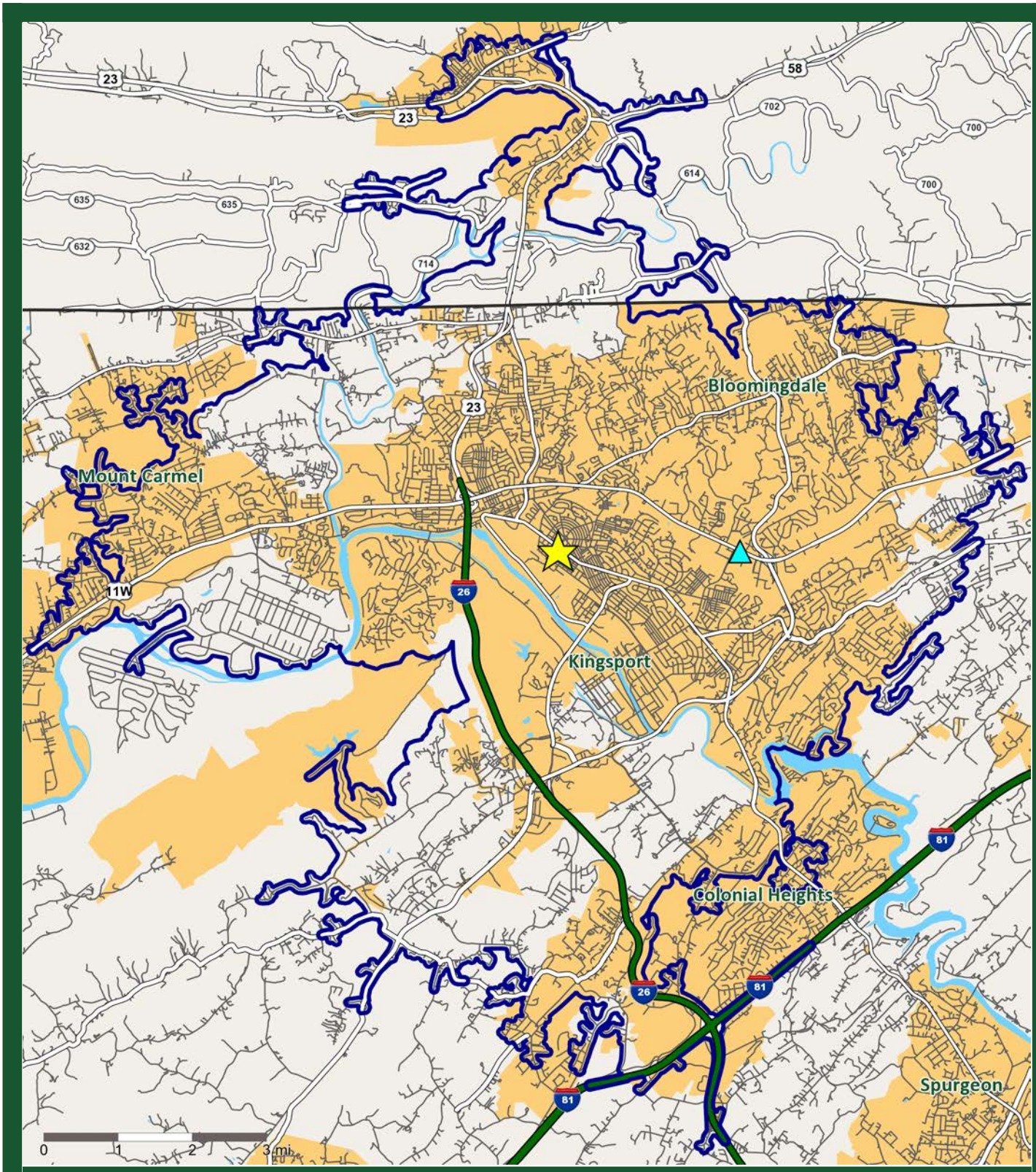
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Anywhere, USA: XYZ Retailer Competition

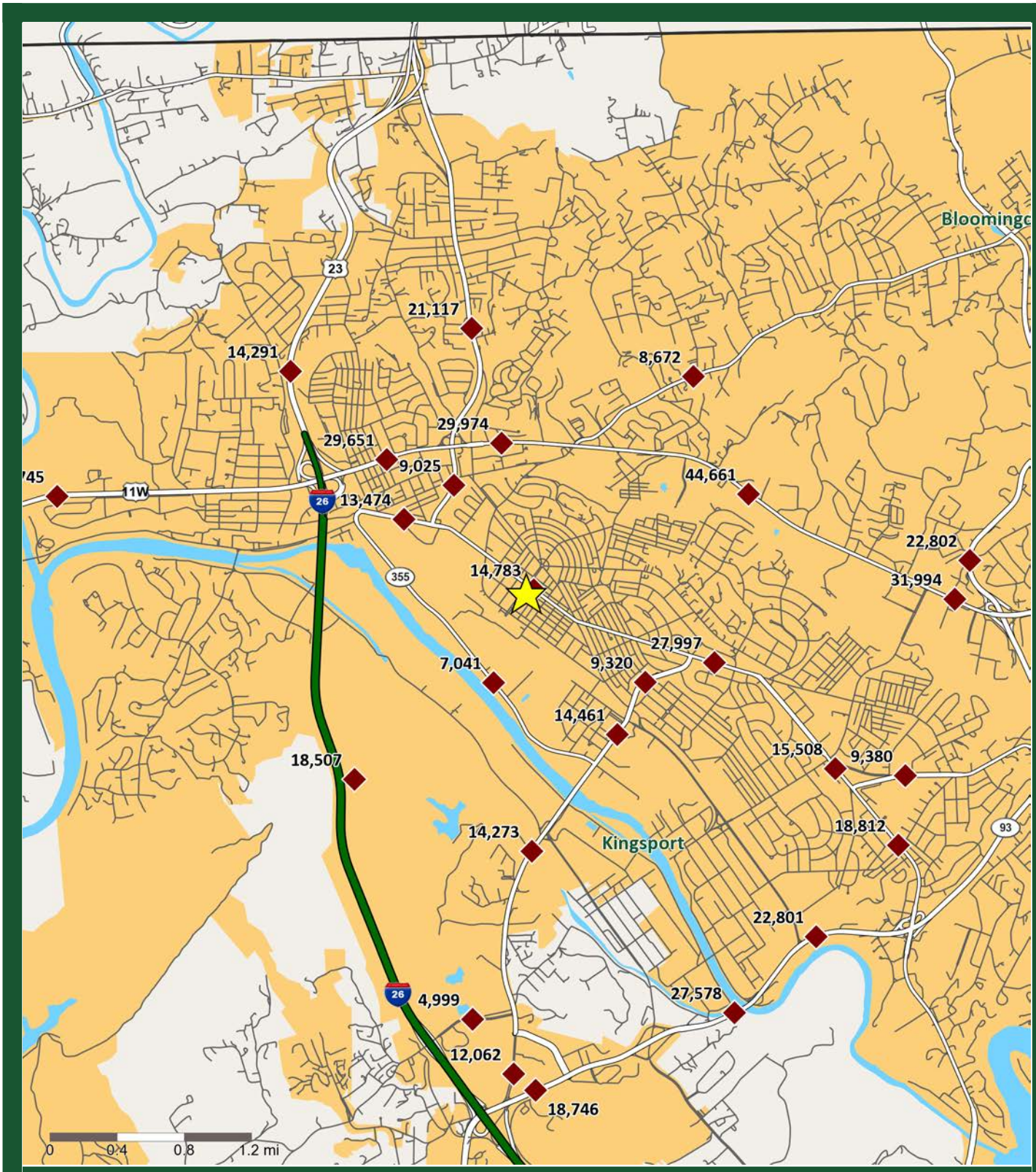
xyz City

- Proposed Retail Location
- 15 Minute Trade Area
- Existing Location
- Competitor 1
- Competitor 2
- Competitor 3

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Anywhere, USA: Traffic Counts

xyz City

Proposed Retail Location

Average Daily Traffic Volume

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Contact Information

For further inquiry on the real estate opportunity for XYZ Retailer at this site location, please contact:

John Doe
City Manager- XYZ City
817.123.4567
jdoe@xyzcity.gov

About Buxton

Buxton is the industry leader in customer analytics. The company advises its clients on real estate and marketing strategies based on 250+ databases combined with clients' customer data. Buxton helps businesses understand who their customers are, where their customers are located, and the value each customer brings to the organization. More than 3,000 clients in the retail, healthcare, CPG, private equity, and public sectors have relied on Buxton's insights to guide their growth strategies. The company is privately held and offers solutions in the United States, Canada, and 26 other countries.

For further inquiry on Buxton or the analysis conducted in this study, please contact:

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Buxton Company
817.332.3681 - buxton@buxtonco.com
2651 S Polaris Dr, Fort Worth, TX 76137

Case Study

ROCK SOLID DEVELOPMENT IN THE GRANITE STATE

A City With Vision

The City of Rochester, New Hampshire, is located in the southeastern portion of the state, just northwest of Portsmouth. With a population of nearly 30,000, Rochester is one of the largest and fastest-growing cities in the Granite State.

LOCATION:

22 miles northwest of Portsmouth, NH

POPULATION:

30,000

CHALLENGE:

Proving development potential

BUXTON CLIENT SINCE:

2007

Rochester city leaders wanted to attract retail and commercial development in order to broaden the commercial property tax base and create jobs. They realized, however, that they needed rock solid proof that the city had both the population and infrastructure to support commercial development. In 2007, the city took a bold step and turned to Buxton for support in making the vision a reality.

Prove It

Buxton conducted a full analysis of Rochester's retail sector, including psychographic analysis of how Rochester's residents behave as shoppers. Based on this analysis, the company provided a list of retailers that have a high likelihood of success in Rochester. Using the tools and resources that Buxton provides, including its web-based SCOUT platform, the city was able to present a convincing case to potential retailers and provide support for existing local businesses.

T.J. Jean, mayor of Rochester, noted that "In this day and age, it's all about analytics and having statistics on your community. Municipalities don't always have that at their fingertips. But with Buxton and the SCOUT program, we've been able to turn that around and provide prospective clients with some really good analytical data to help them make their decision to locate in Rochester."

Award-Winning Results

Rochester's investment in retail development has delivered rock solid results. In addition to retaining many existing businesses, the city has recruited more than 30 of the retailers or equivalent retailers on the list of those recommended by Buxton, including Kohl's, Lowe's, and Staples. Rochester Crossing now provides over 250,000 square feet of shopping and dining options, and a new 299,000 square foot development is nearing final approval.

Rochester Annually Earns $91 For Every $1 Invested In Retail Recruitment

A recent economic impact analysis estimated that **Rochester annually earns $91 for every $1 invested with Buxton** at the beginning of the partnership. Furthermore, the investment generated an estimated annual cash ROI of $2.7 million in 2013 alone. The city's economic development efforts have been honored with multiple awards in the last year, highlighting their winning strategy. In early 2014, Rochester renewed its partnership with Buxton and looks forward to building on its success.

Take Your Retail Development To The Next Level

Since 1994, Buxton has provided big answers for retailers and communities. Our insights go beyond broad regional demographics by drilling down to the household-level in order to give you the clearest picture of your community. We've helped 650 communities recruit over 35 million square feet of retail space.



Buxton®

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Testimonials

Please take a look at the links below of a couple client testimonials of cities very similar to Ramsey:

- https://www.buxtonco.com/learn/partnering-with-buxton Why you should partner with Buxton. Answers a lot of your questions!

- https://www.buxtonco.com/learn/rochester-nh-uses-customer-analytics-to-grow-their-community (Rochester, NH → Did the recent study that found for every $1 invested in Buxton Partnership they are seeing a $91 Yearly ROI).

- https://www.buxtonco.com/learn/oak-park-illinois-finds-the-right-retail-recruitment-partner (Oak Park, IL) → Very similar initiatives to Ramsey!

Cody Gunstenson
Buxton – Director of Sales
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Retail Site Assessment

August 2008

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Buxton Community*ID* Staff

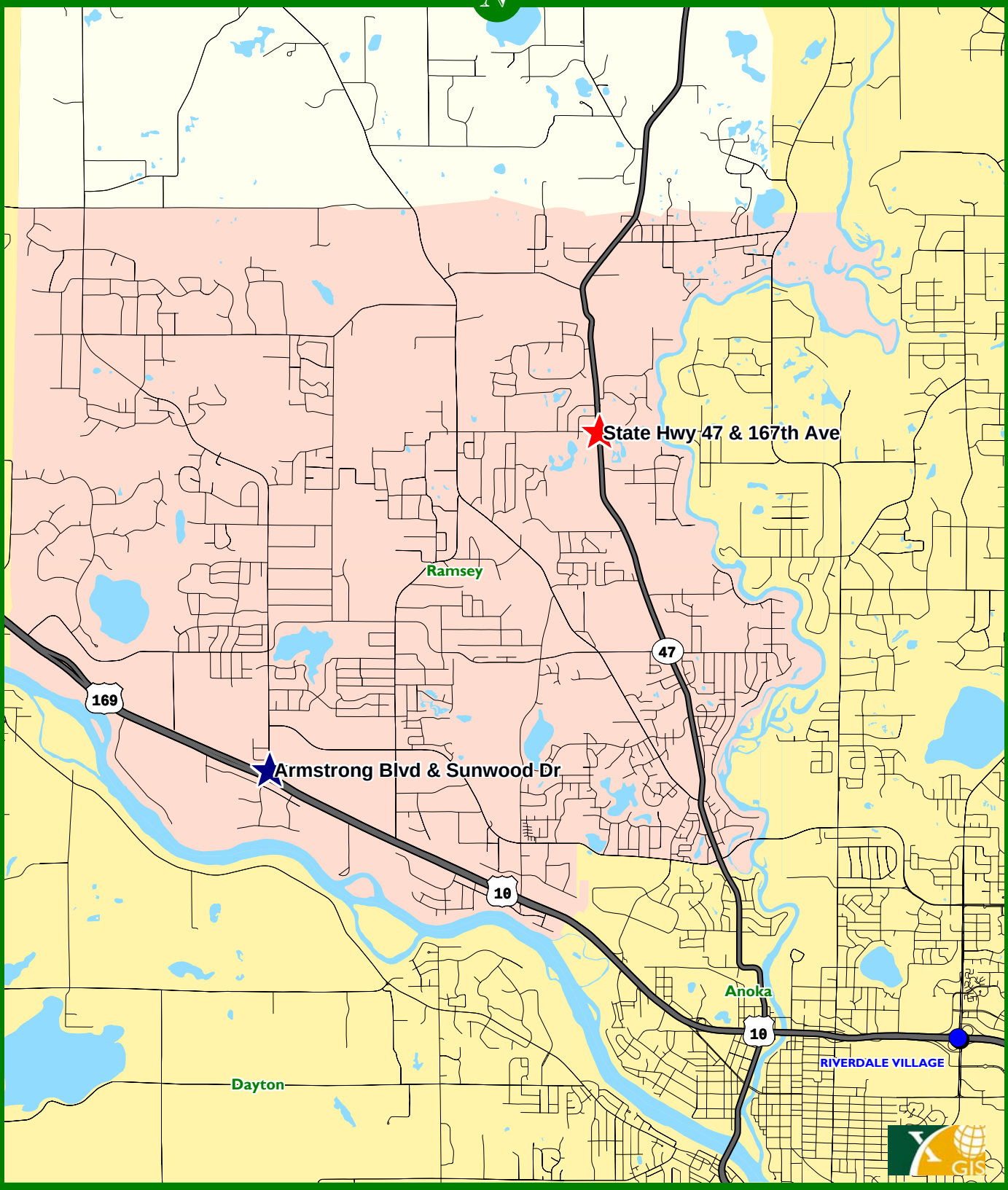
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All Buxton personnel may be reached by phone at 817.332.3681

Data Sources: Claritas, Inc., Prizm®NE, 2008, InfoUSA, Inc., © 2008 , National Research Bureau, © 2008 , MediamarkResearch, Inc., © 2008 , Geographic Data Technology, Inc. © 2008



Ramsey, Minnesota: Overview

City of RAMSEY

CommunityID

Shopping Centers

GLA in thousands

1000+

500 to 1000

City Limits

Site 1

Site 2

Miles

0 0.5 1

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Ramsey's Retail Sites

To begin the Community*ID* process, the City of Ramsey selected two sites to be analyzed for possible retail development or revitalization. The locations of both sites are shown on the opposite page.

To aid in the retail recruitment process, Buxton has analyzed the retail potential of the each site based on the following analyses:

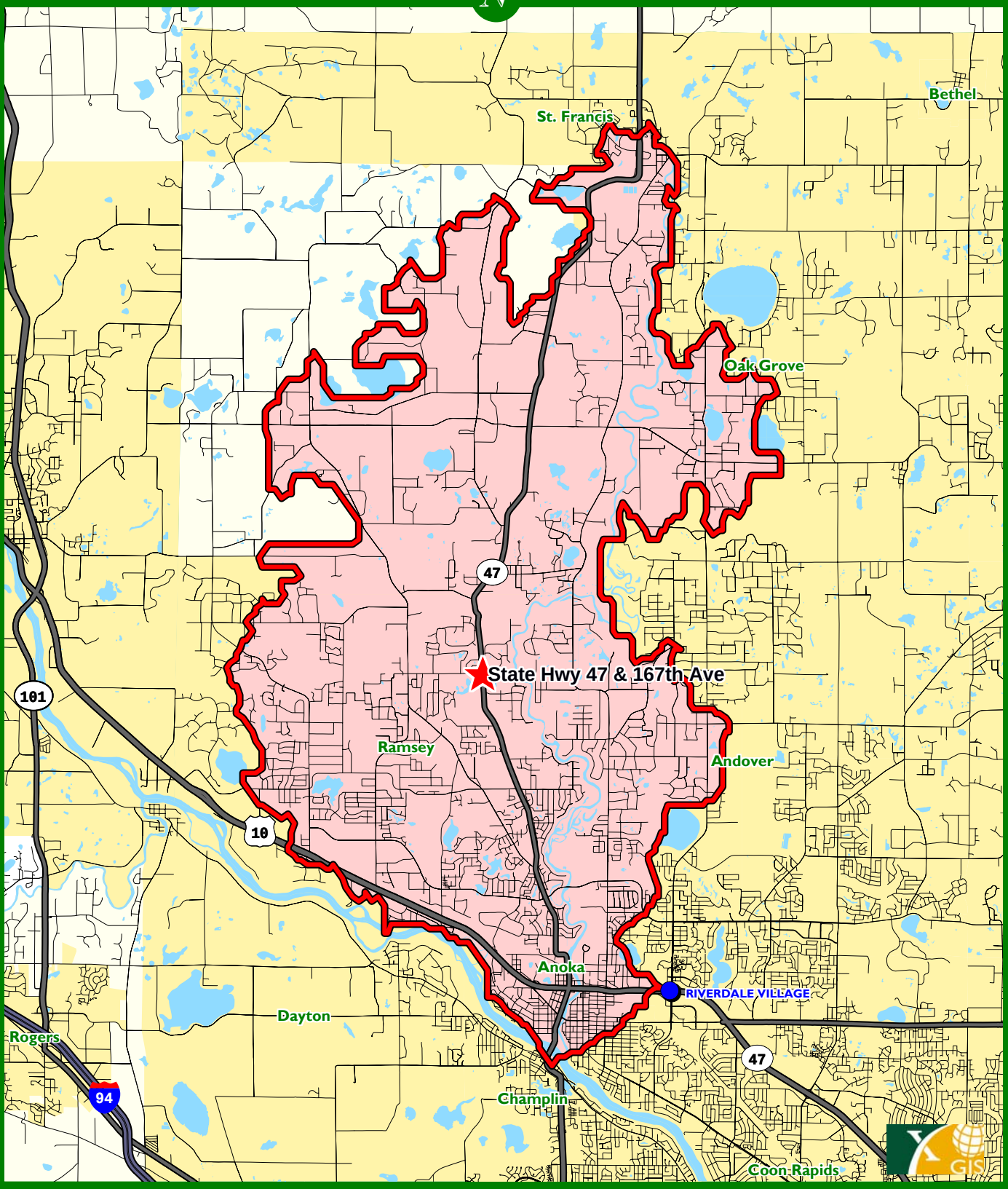
- A primary twelve-minute drive-time trade area was delineated for each site
- The customers in each trade area were segmented according to buying habits and lifestyles
- A profile of Ramsey's customers within each trade area was developed
- The surplus and leakage for more than 36 product types and 74 store types was determined for each potential trade area

The purpose of these analyses is to develop Ramsey's Customer Profile. The Customer Profile is a snapshot of the customers that reside in Ramsey's trade area. Even though these consumers are complex and diverse, Buxton is able to capture and catalogue the extent to which potential demand for a retailer's goods and services are being met within the trade area.

By overlaying Ramsey's Customer Profile with over 4,500 retail matching profiles in Buxton's proprietary database, we are able to identify major categories of retail that are candidates for location in Ramsey. This matching provides the basis for determining Ramsey's viability to attract retailers and restaurants and forms the basis for Buxton's recommendations and conclusions.

With this analysis and Buxton's recommendations, Ramsey can make a more informed decision about investments in infrastructure and can focus resources on areas of higher retail development potential.

Data Sources: Claritas, Inc., Prizm®NE, 2008 , InfoUSA, Inc., © 2008 , National Research Bureau, © 2008 , MediamarkResearch, Inc., © 2008 , Geographic Data Technology, Inc. © 2008



Ramsey, Minnesota: Trade Area

City of RAMSEY

CommunityID

Shopping Centers

GLA in thousands

1000+

500 to 1000

12 Minute Drive Time

Site 1

Miles

0 1 2

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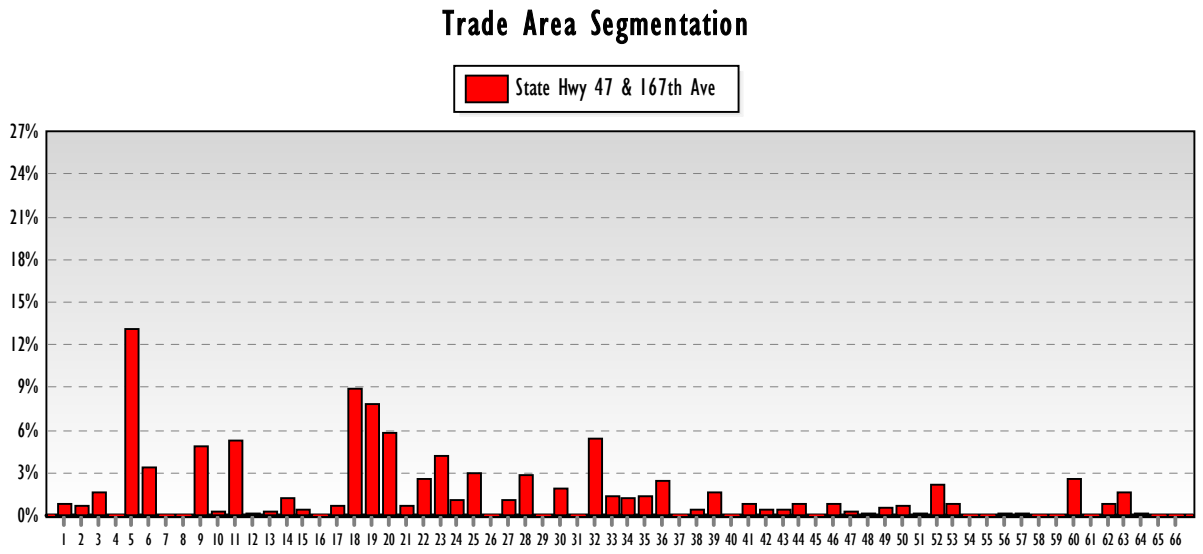
Site 1 Analysis: State Hwy 47 & 167th Ave

Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for Site 1. The primary trade area consists of a twelve-minute polygon, determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within a twelve-minute drive-time of Site 1 is presented below.



Source: Claritas, Inc, PRIZM® NE, © 2008

Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site 1.

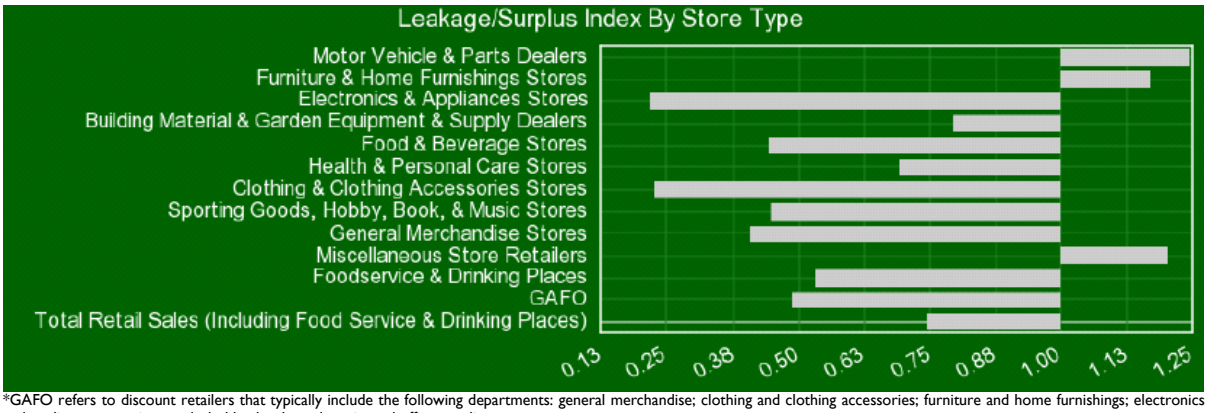
Dominant Segments	Description	Households	% of All Households
5	COUNTRY SQUIRES	1,937	13.15%
6	WINNER'S CIRCLE	500	3.39%
9	BIG FISH, SMALL POND	721	4.89%
11	GOD'S COUNTRY	771	5.23%
18	KIDS & CUL-DE-SACS	1,310	8.89%
19	HOME SWEET HOME	1,148	7.79%
20	FAST-TRACK FAMILIES	853	5.79%
23	GREENBELT SPORTS	614	4.17%
25	COUNTRY CASUALS	445	3.02%
32	NEW HOMESTEADERS	793	5.38%

Source: Claritas, Inc, PRIZM® NE, © 2008

Site 1 Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



*GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies

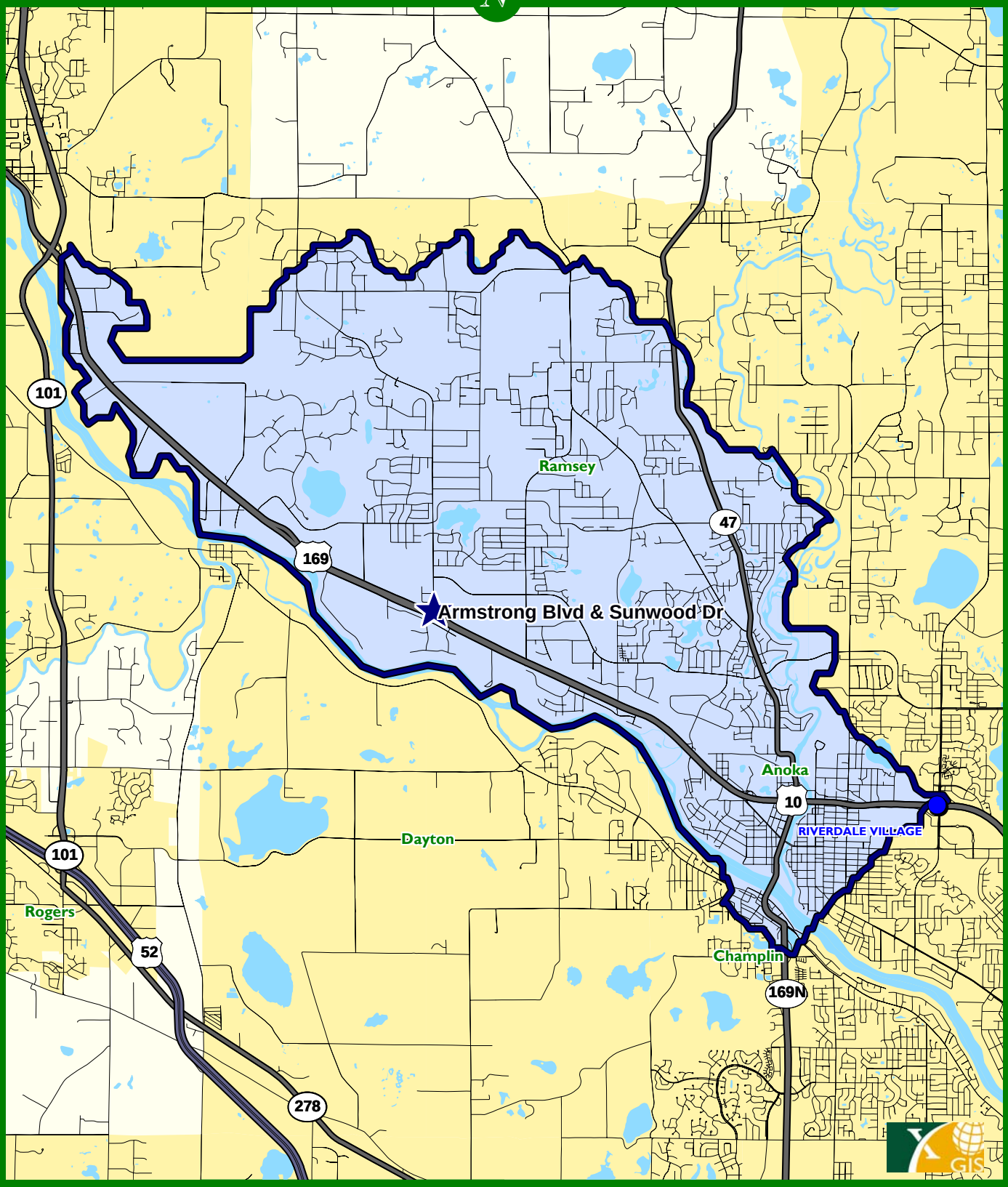
Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site 1:

Trade Potential Variables	Site 1
Estimated Household Count	14,733
Number of Households in Dominant Segments	9,092
Traffic Count	9,600
Total Demand	$754,662,615
Total Supply	$562,622,535
Leakage/Surplus	($192,040,080)

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008

Data Sources: Claritas, Inc., Prizm®NE, 2008 , InfoUSA, Inc., © 2008 , National Research Bureau, © 2008 , MediamarkResearch, Inc., © 2008 , Geographic Data Technology, Inc. © 2008



Ramsey, Minnesota: Trade Area

City of RAMSEY

CommunityID

Shopping Centers

GLA in thousands

1000+

500 to 1000

12 Minute Drive Time

Site 2

Miles

0 1 2

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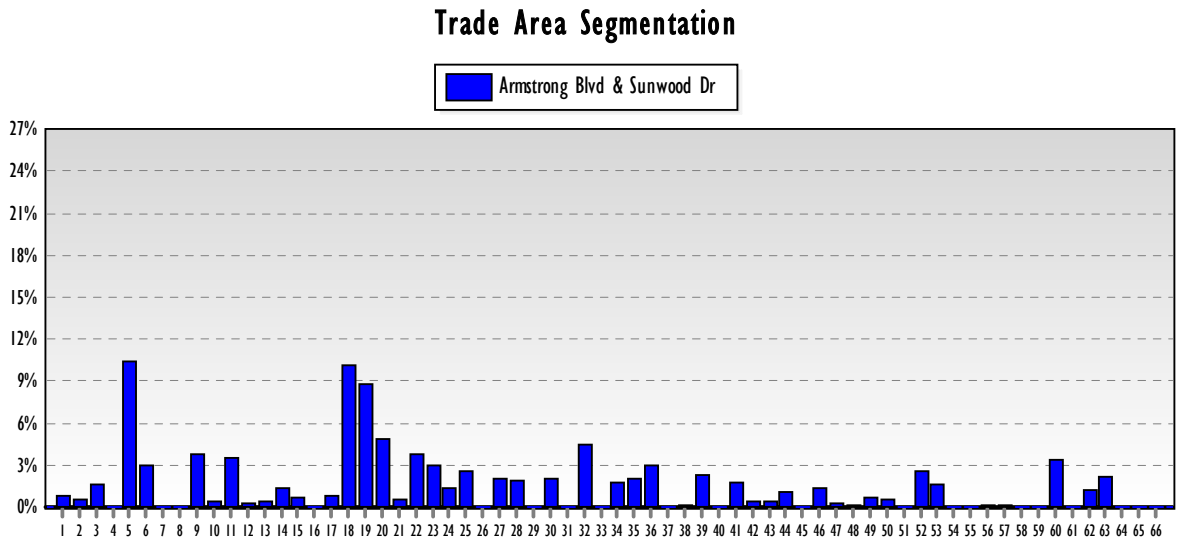
Site 2 Analysis: Armstrong Blvd & Sunwood Dr

Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for Site 2. The primary trade area consists of a twelve-minute polygon, determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within a twelve -minute drive-time of Site 2 is presented below.



Source: Claritas, Inc, PRIZM® NE, © 2008

Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site 2.

Dominant Segments	Description	Households	% of All Households
5	COUNTRY SQUIRES	1,410	10.40%
6	WINNER'S CIRCLE	409	3.02%
9	BIG FISH, SMALL POND	506	3.73%
11	GOD'S COUNTRY	484	3.57%
18	KIDS & CUL-DE-SACS	1,382	10.20%
19	HOME SWEET HOME	1,182	8.72%
20	FAST-TRACK FAMILIES	666	4.91%
22	YOUNG INFLUENTIALS	514	3.79%
32	NEW HOMESTEADERS	598	4.41%
60	PARK BENCH SENIORS	464	3.42%

Source: Claritas, Inc, PRIZM® NE, © 2008

Site 2 Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



*GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies

Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site 2:

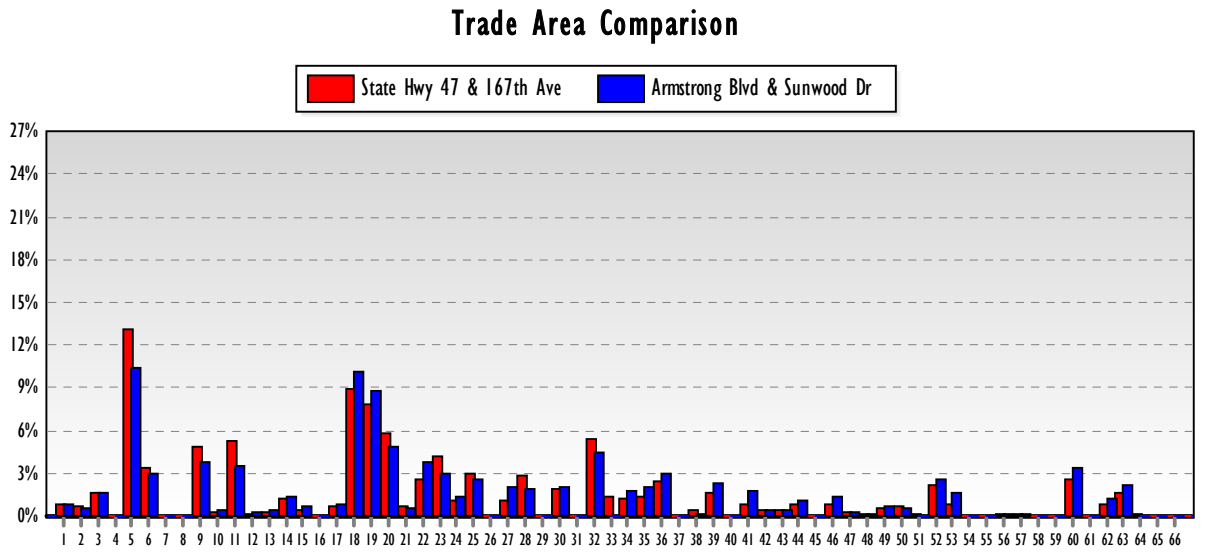
Trade Potential Variables	Site 2
Estimated Household Count	13,554
Number of Households in Dominant Segments	7,615
Traffic Count	39,000
Total Demand	$1,263,042,337
Total Supply	$1,561,717,215
Leakage/Surplus	$298,674,878

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008

Site Comparison

Trade Area Segmentation

This side by side comparison of the two trade areas shows the compositions and characteristics of the households to be very similar. This is not unusual and can be expected in an area with potential sites in close proximity. Both trade areas have the same segmentation, but some segments are dominant in one trade area, and not the other.



Source: Claritas, Inc, PRIZM® NE, © 2008

12- Minute Trade Area Statistics

Trade Potential Variables	Site 1	Site 2
Estimated Household Count	14,733	13,554
Number of Households in Dominant	9,092	7,615
Traffic Count	9,600	39,000
Total Demand	$754,662,615	$1,263,042,337
Actual Sales	$562,622,535	$1,561,717,215
Leakage/Surplus Total	($192,040,080)	$298,674,878

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008

Brief Segment Descriptions

1 UPPER CRUST – The nation's most exclusive address, Upper Crust is the wealthiest lifestyle in America—a haven for empty-nesting couples over 55 years old. No segment has a higher concentration of residents earning over $200,000 a year or possessing a postgraduate degree, and none has a more opulent standard of living.

2 BLUE BLOOD ESTATES – Blue Blood Estates is a family portrait of suburban wealth, a place of million-dollar homes and manicured lawns, high-end cars and exclusive private clubs. The nation's second-wealthiest lifestyle, it is characterized by married couples with children, college degrees, a significant percentage of Asian Americans and six-figure incomes earned by business executives, managers and professionals.

3 MOVERS & SHAKERS – Movers & Shakers is home to America's up-and-coming business class: a wealthy suburban world of dual-income couples who are highly educated, typically between the ages of 35 and 54, often with children. Given its high percentage of executives and white-collar professionals, there is a decided business bent to this segment: Movers & Shakers rank number one for owning a small business and having a home office.

4 YOUNG DIGERATI – Young Digerati are the nation's tech-savvy singles and couples living in fashionable neighborhoods on the urban fringe. Affluent, highly educated and ethnically mixed, Young Digerati communities are typically filled with trendy apartments and condos, fitness clubs and clothing boutiques, casual restaurants and all types of bars—from juice to coffee to microbrew.

5 COUNTRY SQUIRES – The wealthiest residents in exurban America live in Country Squires, an oasis for affluent Baby Boomers who have fled the city for the charms of small-town living. In their bucolic communities noted for their recently built homes on sprawling properties, the families of executives live in six-figure comfort. Country Squires enjoy country club sports like golf, tennis and swimming as well as skiing, boating and biking.

6 WINNER'S CIRCLE – Among the wealthy suburban lifestyles, Winner's Circle is the youngest, a collection of mostly 25- to 34-year-old couples with large families in new-money subdivisions. Surrounding their homes are the signs of upscale living: recreational parks, golf courses and upscale malls. With a median income of nearly $90,000, Winner's Circle residents are big spenders who like to travel, ski, go out to eat, shop at clothing boutiques and take in a show.

7 MONEY & BRAINS – The residents of Money & Brains seem to have it all: high incomes, advanced degrees and sophisticated tastes to match their credentials. Many of these city dwellers—predominantly white with a high concentration of Asian Americans—are married couples with few children who live in fashionable homes on small, manicured lots.

Brief Segment Descriptions

8 EXECUTIVE SUITES – Executive Suites consists of upper-middle-class singles and couples typically living just beyond the nation's beltways. Filled with significant numbers of Asian Americans and college graduates—both groups are represented at more than twice the national average—this segment is a haven for white-collar professionals drawn to comfortable homes and apartments within a manageable commute to downtown jobs, restaurants and entertainment.

9 BIG FISH, SMALL POND – Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, belonging to country clubs, maintaining large investment portfolios and spending freely on computer technology.

10 SECOND CITY ELITE – There's money to be found in the nation's smaller cities, and you're most likely to find it in Second City Elite. The residents of these satellite cities tend to be prosperous executives who decorate their $200,000 homes with multiple computers, large-screen TV sets and an impressive collection of wines. With more than half holding college degrees, Second City Elite residents enjoy cultural activities—from reading books to attending theater and dance productions.

11 GOD'S COUNTRY – When city dwellers and suburbanites began moving to the country in the 1970's, God's Country emerged as the most affluent of the nation's exurban lifestyles. Today, wealthier communities exist in the hinterlands, but God's Country remains a haven for upper-income couples in spacious homes. Typically college-educated Baby Boomers, these Americans try to maintain a balanced lifestyle between high-power jobs and laid-back leisure.

12 BRITE LITES, LI'L CITY – Not all of the America's chic sophisticates live in major metros. Brite Lights, Li'l City is a group of well-off, middle-aged couples settled in the nation's satellite cities. Residents of these typical double income, no kids households have college educations, well-paying business and professional careers and swank homes filled with the latest technology.

13 UPWARD BOUND – More than any other segment, Upward Bound appears to be the home of those legendary Soccer Moms and Dads. In these small satellite cities, upper-class families boast dual incomes, college degrees and new split-levels and colonials. Residents of Upward Bound tend to be kid-obsessed, with heavy purchases of computers, action figures, dolls, board games, bicycles and camping equipment.

14 NEW EMPTY NESTS – With their grown-up children recently out of the house, New Empty Nests is composed of upscale older Americans who pursue active—and activist— lifestyles. Nearly three-quarters of residents are over 65 years old, but they show no interest in a rest-home retirement. This is the top-ranked segment for all-inclusive travel packages; the favorite destination is Italy.

Brief Segment Descriptions

15 POOLS & PATIOS – Formed during the postwar Baby Boom, Pools & Patios has evolved from a segment of young suburban families to one for mature, empty-nesting couples. In these stable neighborhoods graced with backyard pools and patios—the highest proportion of homes were built in the 1960's—residents work as white-collar managers and professionals, and are now at the top of their careers.

16 BOHEMIAN MIX – A collection of young, mobile urbanites, Bohemian Mix represents the nation's most liberal lifestyles. Its residents are a progressive mix of young singles and couples, students and professionals, Hispanics, Asians, African-Americans and whites. In their funky row houses and apartments, Bohemian Mixers are the early adopters who are quick to check out the latest movie, nightclub, laptop and microbrew.

17 BELTWAY BOOMERS – The members of the postwar Baby Boom are all grown up. Today, these Americans are in their forties and fifties, and one segment of this huge cohort—college-educated, upper-middle-class and home-owning—is found in Beltway Boomers. Like many of their peers who married late, these Boomers are still raising children in comfortable suburban subdivisions, and they're pursuing kid-centered lifestyles.

18 KIDS & CUL-DE-SACS – Upscale, suburban, married couples with children is the description of Kids & Cul-de-Sacs, an enviable lifestyle of large families in recently built subdivisions. With a high rate of Hispanic and Asian Americans, this segment is a refuge for college-educated, white-collar professionals with administrative jobs and upper-middle-class incomes. Their nexus of education, affluence and children translates into large outlays for child-centered products and services.

19 HOME SWEET HOME – Widely scattered across the nation's suburbs, the residents of Home Sweet Home tend to be upper-middle-class married couples living in mid-sized homes with few children. The adults in the segment, mostly between the ages of 25 and 54, have gone to college and hold professional and white-collar jobs. With their upscale incomes and small families, these folks have fashioned comfortable lifestyles, filling their homes with toys, TV sets and pets.

20 FAST-TRACK FAMILIES – With their upper-middle-class incomes, numerous children and spacious homes, Fast-Track Families are in their prime acquisition years. These middle-aged parents have the disposable income and educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems and video games. They take advantage of their rustic locales by camping, boating and fishing.

Brief Segment Descriptions

21 GRAY POWER – The steady rise of older, healthier Americans over the past decade has produced one important by-product: middle-class, home-owning suburbanites who are aging in place rather than moving to retirement communities. A segment of older, mid-scale singles and couples who live in quiet comfort, Gray Power reflects this trend.

22 YOUNG INFLUENTIALS – Once known as the home of the nation's yuppies, Young Influentials reflects the fading glow of acquisitive yuppiedom. Today, the segment is a common address for young, middle-class singles and couples who are more preoccupied with balancing work and leisure pursuits. Having recently left college dorms, they now live in apartment complexes surrounded by ball fields, health clubs and casual-dining restaurants.

23 GREENBELT SPORTS – A segment of middle-class exurban couples, Greenbelt Sports is known for its active lifestyle. Most of these middle-aged residents are married, college-educated and own new homes; about a third have children. And few segments have higher rates for pursuing outdoor activities such as skiing, canoeing, backpacking, boating and mountain biking.

24 UP-AND-COMERS – Up-and-Comers is a stopover for young, mid-scale singles before they marry, have families and establish more deskbound lifestyles. Found in second-tier cities, these mobile twenty-somethings include a disproportionate number of recent college graduates who are into athletic activities, the latest technology and nightlife entertainment.

25 COUNTRY CASUALS – There's a laid-back atmosphere in Country Casuals, a collection of middle-aged, upper-middle-class households that have started to empty-nest. Workers here—and most households boast two earners—have well-paying blue- or white-collar jobs, or own small businesses. Today these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares and going out to eat.

26 THE COSMOPOLITANS – Educated, mid-scale and multi-ethnic, The Cosmopolitans are urbane couples in America's fast-growing cities. Concentrated in a handful of metros—such as Las Vegas, Miami and Albuquerque—these households feature older home-owners, empty-nesters and college graduates. A vibrant social scene surrounds their older homes and apartments, and residents love the nightlife and enjoy leisure-intensive lifestyles.

27 MIDDLEBURG MANAGERS – Middleburg Managers arose when empty-nesters settled in satellite communities which offered a lower cost of living and more relaxed pace. Today segment residents tend to be middle-class and over 55 years old with solid managerial jobs and comfortable retirements. In their older homes, they enjoy reading, playing musical instruments, indoor gardening and refinishing furniture.

Brief Segment Descriptions

28 TRADITIONAL TIMES – Traditional Times is the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically in their fifties and sixties, these middle-class Americans pursue a kind of granola-and-grits lifestyle. On their coffee tables are magazines with titles ranging from *Country Living* and *Country Home* to *Gourmet* and *Forbes.* But they're big travelers, especially in recreational vehicles and campers.

29 AMERICAN DREAMS – American Dreams is a living example of how ethnically diverse the nation has become: more than half the residents are Hispanic, Asian or African-American. In these multilingual neighborhoods—one in ten residents speaks a language other than English—middle-aged immigrants and their children live in middle-class comfort.

30 SUBURBAN SPRAWL – Suburban Sprawl is an unusual American lifestyle: a collection of mid-scale, middle-aged singles and couples living in the heart of suburbia. Typically members of the Baby Boom generation, they hold decent jobs, own older homes and condos, and pursue conservative versions of the American Dream. Among their favorite activities are jogging on treadmills, playing trivia games and renting videos.

31 URBAN ACHIEVERS – Concentrated in the nation's port cities, Urban Achievers is often the first stop for up-and-coming immigrants from Asia, South America and Europe. These young singles and couples are typically college-educated and ethnically diverse: about a third are foreign-born, and even more speak a language other than English.

32 NEW HOMESTEADERS – Young, middle-class families seeking to escape suburban sprawl find refuge in New Homesteaders, a collection of small rustic townships filled with new ranches and Cape Cods. With decent-paying jobs in white-collar and service industries, these dual-income couples have fashioned comfortable, child-centered lifestyles, their driveways filled with campers and powerboats, their family rooms with PlayStations and Game Boys.

33 BIG SKY FAMILIES – Scattered in placid towns across the American heartland, Big Sky Families is a segment of young rural families who have turned high school educations and blue-collar jobs into busy, middle-class lifestyles. Residents like to play baseball, basketball and volleyball in addition to going fishing, hunting and horseback riding. To entertain their sprawling families, they buy virtually every piece of sporting equipment on the market.

34 WHITE PICKET FENCES – Midpoint on the socioeconomic ladder, residents in White Picket Fences look a lot like the stereotypical American household of a generation ago: young, middle-class, married with children. But the current version is characterized by modest homes and ethnic diversity—including a disproportionate number of Hispanics and African-Americans.

Brief Segment Descriptions

35 BOOMTOWN SINGLES – Affordable housing, abundant entry-level jobs and a thriving singles scene— all have given rise to the Boomtown Singles segment in fast-growing satellite cities. Young, single and working-class, these residents pursue active lifestyles amid sprawling apartment complexes, bars, convenience stores and laundromats.

36 BLUE-CHIP BLUES – Blue-Chip Blues is known as a comfortable lifestyle for young, sprawling families with well-paying blue-collar jobs. Ethnically diverse—with a significant presence of Hispanics and African-Americans—the segment's aging neighborhoods feature compact, modestly priced homes surrounded by commercial centers that cater to child-filled households.

37 MAYBERRY-VILLE – Like the old Andy Griffith Show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, middle-class couples and families like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles and pickup trucks.

38 SIMPLE PLEASURES – With more than two-thirds of its residents over 65 years old, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school-educated seniors who held blue-collar jobs before their retirement, and a disproportionate number served in the military; no segment has more members of veterans clubs.

39 DOMESTIC DUOS – Domestic Duos represents a middle-class mix of mainly over-55 singles and married couples living in older suburban homes. With their high-school educations and fixed incomes, segment residents maintain an easy-going lifestyle. Residents like to socialize by going bowling, seeing a play, meeting at the local fraternal order or going out to eat.

40 CLOSE-IN COUPLES – Close-In Couples is a group of predominantly African-American couples living in older homes in the urban neighborhoods of mid-sized metros. High school educated and empty nesting, these 55-year-old-plus residents typically live in older city neighborhoods, enjoying secure and comfortable retirements.

41 SUNSET CITY BLUES – Scattered throughout the older neighborhoods of small cities, Sunset City Blues is a segment of lower-middle-class singles and couples who have retired or are getting close to retirement. These empty-nesters tend to own their homes but have modest educations and incomes. They maintain a low-key lifestyle filled with newspapers and television by day, and family-style restaurants at night.

Brief Segment Descriptions

42 RED, WHITE & BLUES – The residents of Red, White & Blues typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast-food restaurants, and locals have recently celebrated the arrival of chains like Wal-Mart, Radio Shack and Payless Shoes. Middle-aged, high school educated and lower-middle class, these folks tend to have solid, blue-collar jobs in manufacturing, milling and construction.

43 HEARTLANDERS – America was once a land of small middle-class towns, which can still be found today among Heartlanders. This widespread segment consists of middle-aged couples with working-class jobs living in sturdy, unpretentious homes. In these communities of small families and empty-nesting couples, Heartlanders pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping and boating.

44 NEW BEGINNINGS – Filled with young, single adults, New Beginnings is a magnet for adults in transition. Many of its residents are twenty-something singles and couples just starting out on their career paths—or starting over after recent divorces or company transfers. Ethnically diverse—with nearly half its residents Hispanic, Asian or African-American—New Beginnings households tend to have the modest living standards typical of transient apartment dwellers.

45 BLUE HIGHWAYS – On maps, blue highways are often two-lane roads that wind through remote stretches of the American landscape. Among lifestyles, Blue Highways is the standout for lower-middle-class couples and families who live in isolated towns and farmsteads. Here, Boomer men like to hunt and fish; the women enjoy sewing and crafts, and everyone looks forward to going out to a country music concert.

46 OLD GLORIES – Old Glories are the nation's downscale suburban retirees, Americans aging in place in older apartment complexes. These racially mixed households often contain widows and widowers living on fixed incomes, and they tend to lead home-centered lifestyles. They're among the nation's most ardent television fans, watching game shows, soaps, talk shows and newsmagazines at high rates.

47 CITY STARTUPS – In City Startups, young, multi-ethnic singles have settled in neighborhoods filled with cheap apartments and a commercial base of cafés, bars, laundromats and clubs that cater to twenty-somethings. One of the youngest segments in America—with ten times as many college students as the national average—these neighborhoods feature low incomes and high concentrations of Hispanics and African-Americans.

Brief Segment Descriptions

48 YOUNG & RUSTIC – Like the soap opera that inspired its nickname, Young & Rustic is composed of young, restless singles. Unlike the glitzy soap denizens, however, these folks tend to be lower income, high school-educated and live in tiny apartments in the nation's exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars and dating.

49 AMERICAN CLASSICS – They may be older, lower-middle class and retired, but the residents of American Classics are still living the American Dream of home ownership. Few segments rank higher in their percentage of home owners, and that fact alone reflects a more comfortable lifestyle for these predominantly white singles and couples with deep ties to their neighborhoods.

50 KID COUNTRY, USA – Widely scattered throughout the nation's heartland, Kid Country, USA is a segment dominated by large families living in small towns. Predominantly white with an above-average concentration of Hispanics, these young working-class households include homeowners, renters and military personnel living in base housing; about 20 percent of residents own mobile homes.

51 SHOTGUNS & PICKUPS – The segment known as Shotguns & Pickups came by its moniker honestly: it scores near the top of all lifestyles for owning hunting rifles and pickup trucks. These Americans tend to be young, working-class couples with large families—more than half have two or more kids—living in small homes and manufactured housing. Nearly a third of residents live in mobile homes, more than any other segment.

52 SUBURBAN PIONEERS – Suburban Pioneers represents one of the nation's eclectic lifestyles, a mix of young singles, recently divorced and single parents who have moved into older, inner-ring suburbs. They live in aging homes and garden-style apartment buildings where the jobs are blue-collar and the money is tight. What unites these residents—a diverse mix of whites, Hispanics and African-Americans—is a working-class sensibility and an appreciation for their off-the-beaten-track neighborhoods.

53 MOBILITY BLUES – Young singles and single parents make their way to Mobility Blues, a segment of working-class neighborhoods in America's satellite cities. Racially mixed and under 25 years old, these transient Americans tend to have modest lifestyles due to their lower-income blue-collar jobs. Surveys show they excel in going to movies, playing basketball and shooting pool.

54 MULTI-CULTI MOSAIC – An immigrant gateway community, Multi-Culti Mosaic is the urban home for a mixed populace of younger Hispanic, Asian and African-American singles and families. With nearly a quarter of the residents foreign born, this segment is a Mecca for first-generation Americans who are striving to improve their lower-middle-class status.

Brief Segment Descriptions

55 GOLDEN PONDS – Golden Ponds is mostly a retirement lifestyle, dominated by downscale singles and couples over 65 years old. Found in small bucolic towns around the country, these high school-educated seniors live in small apartments on less than $25,000 a year; one in five resides in a nursing home. For these elderly residents, daily life is often a succession of sedentary activities such as reading, watching TV, playing bingo and doing craft projects.

56 CROSSROADS VILLAGERS – With a population of middle-aged, blue-collar couples and families, Crossroads Villagers is a classic rural lifestyle. Residents are high school-educated with lower-middle incomes and modest housing; one-quarter live in mobile homes. There's an air of self-reliance in these households as Crossroads Villagers help put food on the table through fishing, gardening and hunting.

57 OLD MILLTOWNS – America's once-thriving mining and manufacturing towns have aged—as have the residents in Old Milltowns communities. Today, the majority of residents are retired singles and couples living on downscale incomes in pre-1960 homes and apartments. For leisure they enjoy gardening, sewing, socializing at veterans clubs or eating out at casual restaurants.

58 BACK COUNTRY FOLKS – Strewn among remote farm communities across the nation, Back Country Folks are a long way away from economic paradise. The residents tend to be poor, over 55 years old and living in older, modest-sized homes and manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape.

59 URBAN ELDERS – For Urban Elders—a segment located in the downtown neighborhoods of such metros as New York, Chicago, Las Vegas and Miami—life is often an economic struggle. These communities have high concentrations of Hispanics and African-Americans and tend to be downscale, with singles living in older apartment rentals.

60 PARK BENCH SENIORS – Park Bench Seniors are typically retired singles living in the racially mixed neighborhoods of the nation's satellite cities. With modest educations and incomes, these residents maintain low-key, sedentary lifestyles. Theirs is one of the top-ranked segments for TV viewing, especially daytime soaps and game shows.

61 CITY ROOTS – Found in urban neighborhoods, City Roots is a segment of lower-income retirees, typically living in older homes and duplexes they've owned for years. In these ethnically diverse neighborhoods—more than a third are African-American and Hispanic—residents are often widows and widowers living on fixed incomes and maintaining low-key lifestyles.

Brief Segment Descriptions

62 HOMETOWN RETIRED – With three-quarters of all residents over 65 years old, Hometown Retired is one of the oldest segments. These racially mixed seniors tend to live in aging homes—half were built before 1958—and typically get by on social security and modest pensions. Because most never made it beyond high school and spent their working lives at blue-collar jobs, their retirements are extremely modest.

63 FAMILY THRIFTS – The small-city cousins of inner-city districts, Family Thrifts contain young, ethnically diverse parents who have lots of children and work entry-level service jobs. In these apartment-filled neighborhoods, visitors find the streets jam-packed with babies and toddlers, tricycles and basketball hoops, Daewoos and Hyundais.

64 BEDROCK AMERICA – Bedrock America consists of young, economically challenged families in small, isolated towns located throughout the nation's heartland. With modest educations, sprawling families and blue-collar jobs, many of these residents struggle to make ends meet. One quarter live in mobile homes. One in three has not finished high school. Rich in scenery, Bedrock America is a haven for fishing, hunting, hiking and camping.

65 BIG CITY BLUES – With a population that's half Latino, Big City Blues has the highest concentration of Hispanic Americans in the nation, but it's also the multi-ethnic address for downscale Asian and African-American households occupying older inner-city apartments. Concentrated in a handful of major metros, these young singles and single-parent families face enormous challenges: low incomes, uncertain jobs and modest educations. More than 40% haven't finished high school.

66 LOW-RISE LIVING – The most economically challenged urban segment, Low-Rise Living is known as a transient world for young, ethnically diverse singles and single parents. Home values are low—about half the national average—and even then, less than a quarter of residents can afford to own real estate.

Buxton utilizes the Claritas® PRIZM®*NE* segmentation system in this analysis. PRIZM®*NE* and Claritas® are registered trademarks of Claritas Inc. The PRIZM segment nicknames (e.g., "Blue Blood Estates," Big Sky Families," "Country Squires") are trademarks of Claritas Inc.

Appendix A:

Leakage Analysis

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Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

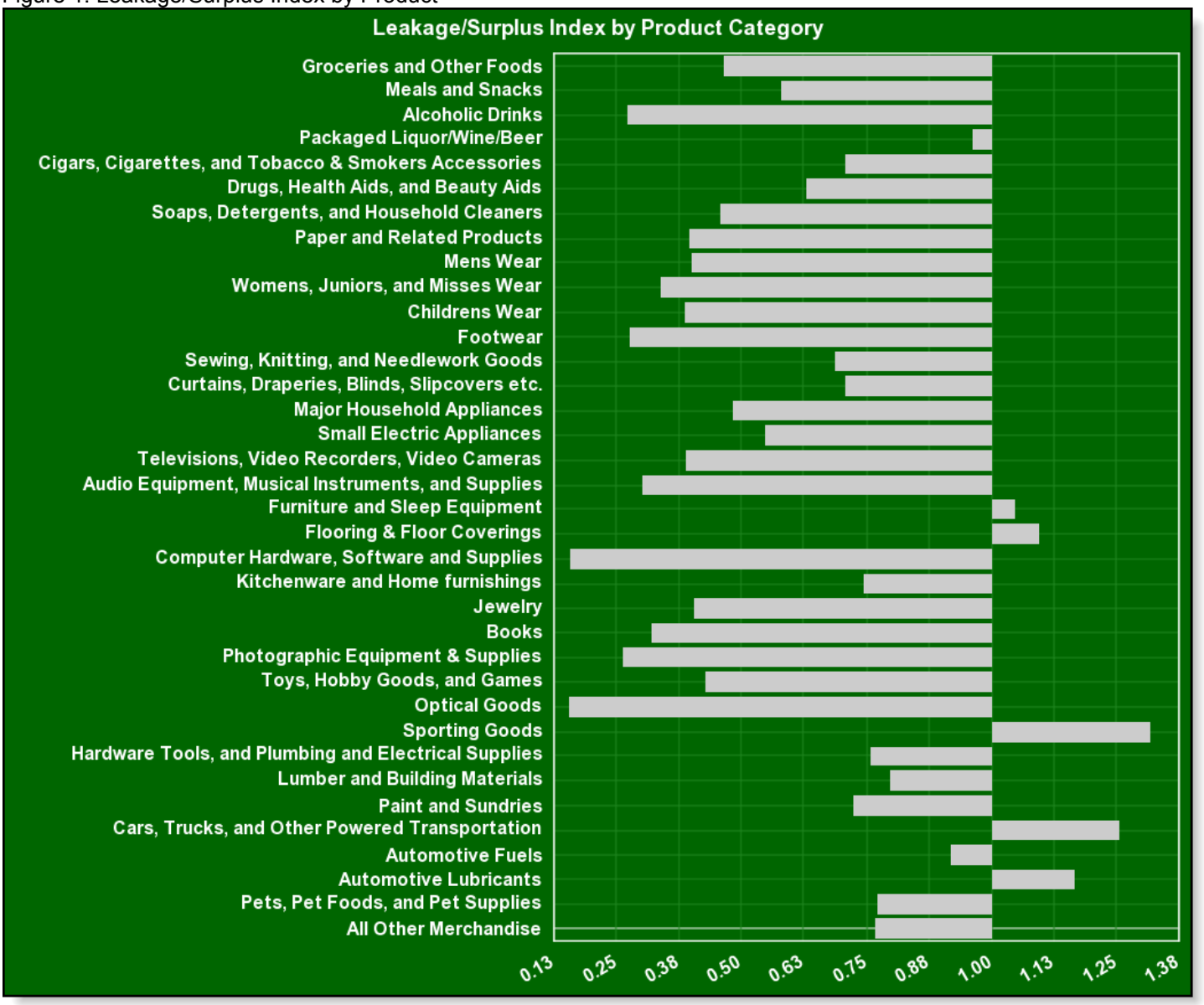
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Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product



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The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	90,717,752	42,236,674	0.5
Meals and Snacks	65,616,311	38,038,204	0.6
Alcoholic Drinks	7,821,568	2,133,119	0.3
Packaged Liquor/Wine/Beer	12,059,987	11,604,911	1.0
Cigars, Cigarettes, and Tobacco & Smokers Accessories	14,063,862	9,967,592	0.7
Drugs, Health Aids, and Beauty Aids	41,357,953	26,130,253	0.6
Soaps, Detergents, and Household Cleaners	4,558,662	2,089,794	0.5
Paper and Related Products	4,603,844	1,817,801	0.4
Mens Wear	15,280,986	6,114,751	0.4
Womens, Juniors, and Misses Wear	28,755,138	9,746,406	0.3
Childrens Wear	7,310,760	2,814,752	0.4
Footwear	11,487,024	3,190,720	0.3
Sewing, Knitting, and Needlework Goods	1,252,971	862,774	0.7
Curtains, Draperies, Blinds, Slipcovers etc.	5,291,767	3,740,982	0.7
Major Household Appliances	6,221,838	3,003,511	0.5
Small Electric Appliances	2,059,130	1,125,269	0.5
Televisions, Video Recorders, Video Cameras	5,366,373	2,079,842	0.4
Audio Equipment, Musical Instruments, and Supplies	8,741,808	2,629,829	0.3
Furniture and Sleep Equipment	13,937,586	14,600,590	1.0
Flooring & Floor Coverings	7,138,207	7,819,018	1.1
Computer Hardware, Software and Supplies	18,155,709	2,851,758	0.2
Kitchenware and Home furnishings	11,061,165	8,243,776	0.7
Jewelry	9,676,302	3,915,560	0.4
Books	4,361,481	1,398,866	0.3
Photographic Equipment & Supplies	2,136,825	563,434	0.3
Toys, Hobby Goods, and Games	7,102,888	3,046,486	0.4
Optical Goods	1,960,303	301,938	0.2
Sporting Goods	12,173,703	16,046,253	1.3
Hardware Tools, and Plumbing and Electrical Supplies	53,593,343	40,591,054	0.8
Lumber and Building Materials	44,049,783	35,048,390	0.8
Paint and Sundries	6,770,039	4,905,221	0.7
Cars, Trucks, and Other Powered Transportation	120,408,652	151,459,386	1.3
Automotive Fuels	54,868,329	50,478,969	0.9
Automotive Lubricants	25,179,448	29,378,254	1.2
Pets, Pet Foods, and Pet Supplies	3,525,739	2,718,871	0.8
All Other Merchandise	25,995,377	19,927,505	0.8

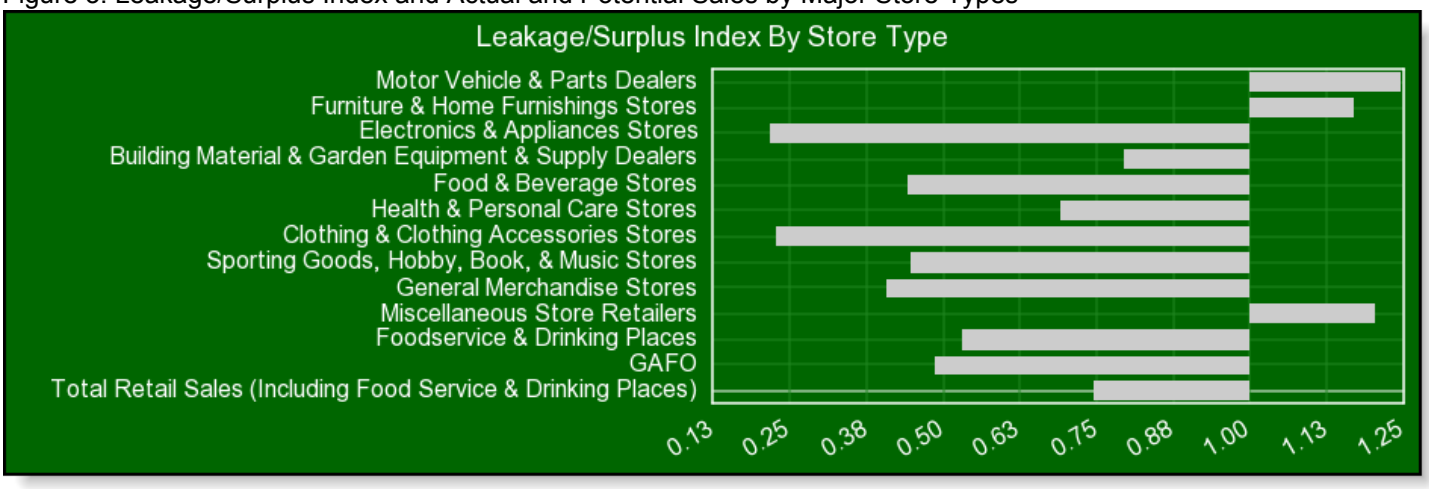
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Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



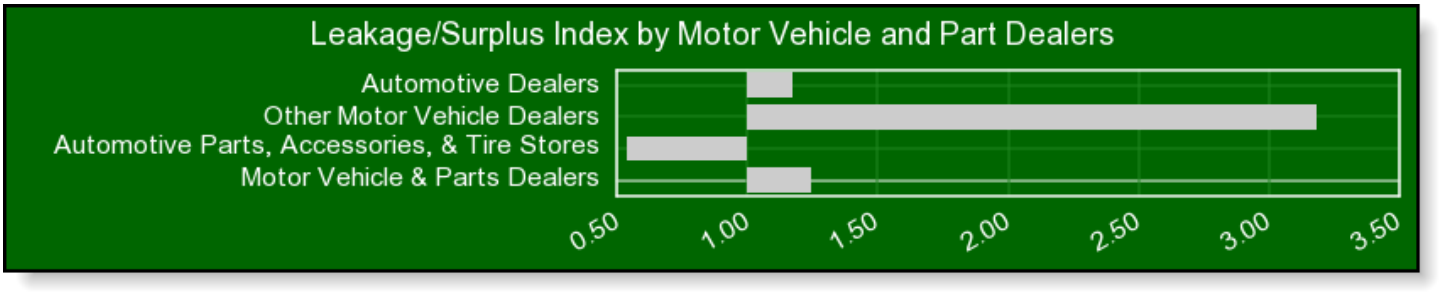
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	149,388,882	185,933,601	1.24
Furniture & Home Furnishings Stores	22,126,546	25,893,941	1.17
Electronics & Appliances Stores	18,868,384	4,103,340	0.22
Building Material & Garden Equipment & Supply Dealers	97,005,144	77,175,569	0.80
Food & Beverage Stores	80,199,279	35,387,349	0.44
Health & Personal Care Stores	32,717,267	22,570,410	0.69
Clothing & Clothing Accessories Stores	37,514,137	8,563,738	0.23
Sporting Goods, Hobby, Book, & Music Stores	15,432,418	6,904,774	0.45
General Merchandise Stores	89,999,655	36,656,167	0.41
Miscellaneous Store Retailers	21,053,899	25,345,424	1.20
Foodservice & Drinking Places	68,264,518	36,213,574	0.53
GAFO	192,446,310	93,396,758	0.49
Total Retail Sales (Including Food Service & Drinking Places)	754,662,615	562,622,535	0.75

*** GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.**

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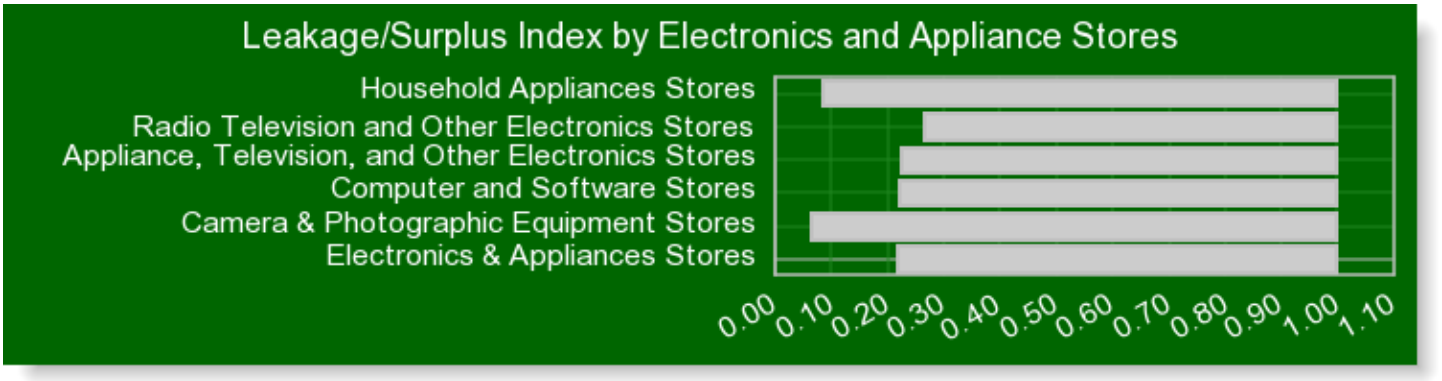
Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identity possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	129,206,049	151,172,101	1.17
Other Motor Vehicle Dealers	9,019,519	28,760,269	3.19
Automotive Parts, Accessories, & Tire Stores	11,163,312	6,001,229	0.54
Motor Vehicle & Parts Dealers	149,388,882	185,933,601	1.24

Site	Address	Analysis Geography
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Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	3,188,341	266,177	0.08
Radio Television and Other Electronics Stores	11,162,821	2,958,361	0.27
Appliance, Television, and Other Electronics Stores	14,351,162	3,224,539	0.22
Computer and Software Stores	3,720,946	828,001	0.22
Camera & Photographic Equipment Stores	796,275	50,799	0.06
Electronics & Appliances Stores	18,868,384	4,103,340	0.22

Site	Address	Analysis Geography
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Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	11,476,919	12,921,832	1.13
Home Furnishing Stores	10,649,626	12,972,108	1.22
Furniture & Home Furnishings Stores	22,126,546	25,893,941	1.17

Site	Address	Analysis Geography
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Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	33,438,154	15,027,819	0.45
Paint and Wallpaper Stores	2,259,630	1,299,428	0.58
Hardware Stores	6,793,838	14,769,305	2.17
Building Materials, Lumberyards	15,701,962	14,213,616	0.91
Other Building Materials Dealers	45,829,569	41,680,807	0.91
Building Material & Supply Dealers	88,321,192	72,777,360	0.82
Outdoor Power Equipment Stores	1,273,354	1,173,868	0.92
Nursery and Garden Centers	7,410,598	3,224,340	0.44
Lawn and Garden Equipment and Supplies Stores	8,683,952	4,398,208	0.51
Building Material & Garden Equipment & Supply Dealers	97,005,144	77,175,569	0.80

Site	Address	Analysis Geography
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Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	68,529,480	26,947,273	0.39
Convenience Stores	3,836,037	633,482	0.17
Grocery Stores	72,365,518	27,580,756	0.38
Specialty Food Stores	2,381,410	615,241	0.26
Beer, Wine, & Liquor Stores	5,452,350	7,191,351	1.32
Food & Beverage Stores	80,199,279	35,387,349	0.44

Site	Address	Analysis Geography
1	State Hwy 47 and 167th Ave Ramsey, MN 55303	12 minute drive time



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	27,914,293	19,946,210	0.71
Cosmetics, Beauty Supplies and Perfume Stores	1,136,261	0	0.00
Optical Goods Stores	1,643,848	184,983	0.11
Other Health and Personal Care Stores	2,022,863	2,439,216	1.21
Health & Personal Care Stores	32,717,267	22,570,410	0.69

Site	Address	Analysis Geography
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Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	1,666,340	997,905	0.60
Womens Clothing Stores	6,880,380	2,446,973	0.36
Childrens and Infants Clothing Stores	1,486,766	0	0.00
Family Clothing Stores	14,134,088	1,736,293	0.12
Clothing Accessories Stores	644,612	12,559	0.02
Other Clothing Stores	1,790,223	52,564	0.03
Clothing Stores	26,602,412	5,246,298	0.20
Shoe Stores	5,171,215	1,016,635	0.20
Jewelry Stores	5,297,263	2,300,804	0.43
Luggage, & Leather Goods Stores	443,245	0	0.00
Jewelry, Luggage, & Leather Goods Stores	5,740,509	2,300,804	0.40
Clothing & Clothing Accessories Stores	37,514,137	8,563,738	0.23

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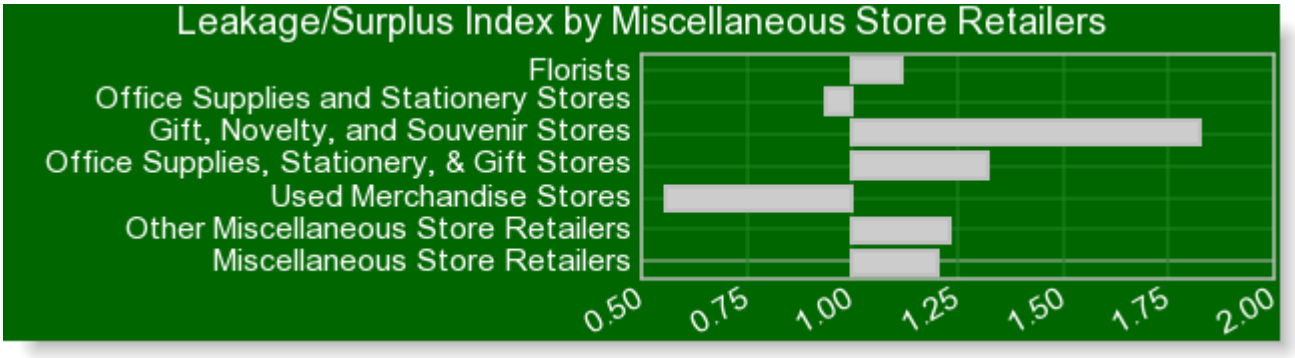
Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	5,829,675	3,952,422	0.68
Hobby, Toys and Games Stores	3,486,887	1,339,364	0.38
Sew/Needlework/Piece Goods Stores	787,585	773,011	0.98
Musical Instrument and Supplies Stores	1,008,800	234,735	0.23
Sporting Goods, Hobby, & Musical Instrument Stores	11,112,947	6,299,533	0.57
Book Stores	2,658,552	170,233	0.06
News Dealers and Newsstands	166,748	0	0.00
Book Stores and News Dealers	2,825,300	170,233	0.06
Prerecorded Tape, Compact Disc, and Record Stores	1,494,169	435,008	0.29
Book, Periodical, & Music Stores	4,319,470	605,241	0.14
Sporting Goods, Hobby, Book, & Music Stores	15,432,418	6,904,774	0.45

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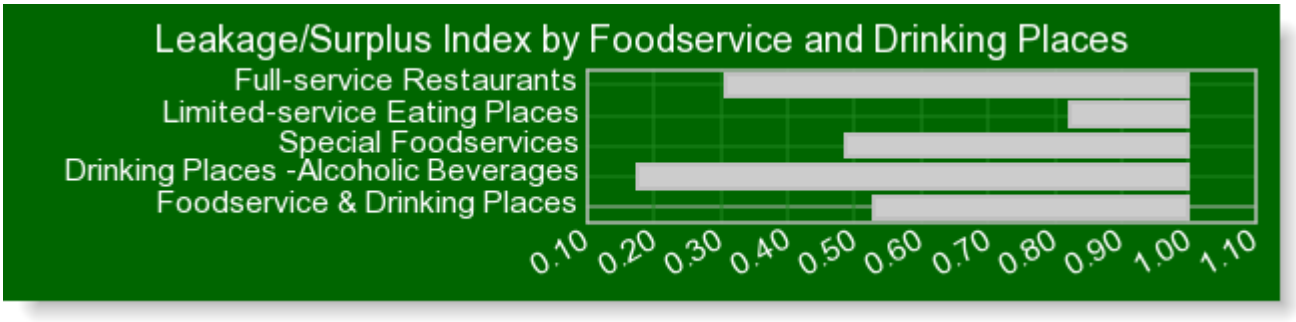
General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	43,406,147	30,193,323	0.70
Warehouse Clubs and Super Stores	39,572,857	5,022,369	0.13
All Other General Merchandise Stores	7,020,650	1,440,474	0.21
Other General Merchandise Stores	46,593,507	6,462,843	0.14
General Merchandise Stores	89,999,655	36,656,167	0.41

Site	Address	Analysis Geography
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Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	1,561,361	1,747,458	1.12
Office Supplies and Stationery Stores	4,790,965	4,493,738	0.94
Gift, Novelty, and Souvenir Stores	3,714,202	6,781,057	1.83
Office Supplies, Stationery, & Gift Stores	8,505,168	11,274,795	1.33
Used Merchandise Stores	1,813,431	1,019,179	0.56
Other Miscellaneous Store Retailers	9,173,937	11,303,990	1.23
Miscellaneous Store Retailers	21,053,899	25,345,424	1.20

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Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	31,067,619	9,480,903	0.31
Limited-service Eating Places	28,584,321	23,515,254	0.82
Special Foodservices	5,525,415	2,679,126	0.48
Drinking Places -Alcoholic Beverages	3,087,162	538,289	0.17
Foodservice & Drinking Places	68,264,518	36,213,574	0.53

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Sources and Methodology

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

Supply estimates are generated from the Census of Retail Trade, a component of the Economic Census. County-level sales tax data is allocated to low levels of geography using business sales estimates, business locations, and employee counts provided by Claritas' Business Facts® database. Supply includes all products sold at retail outlets in a specified area for a one-year period. Supply is defined as the estimated total retail sales for a retail store type or merchandise line item.

Source: Retail Market Power™ (Claritas).

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Retail Leakage and Surplus Analysis

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Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

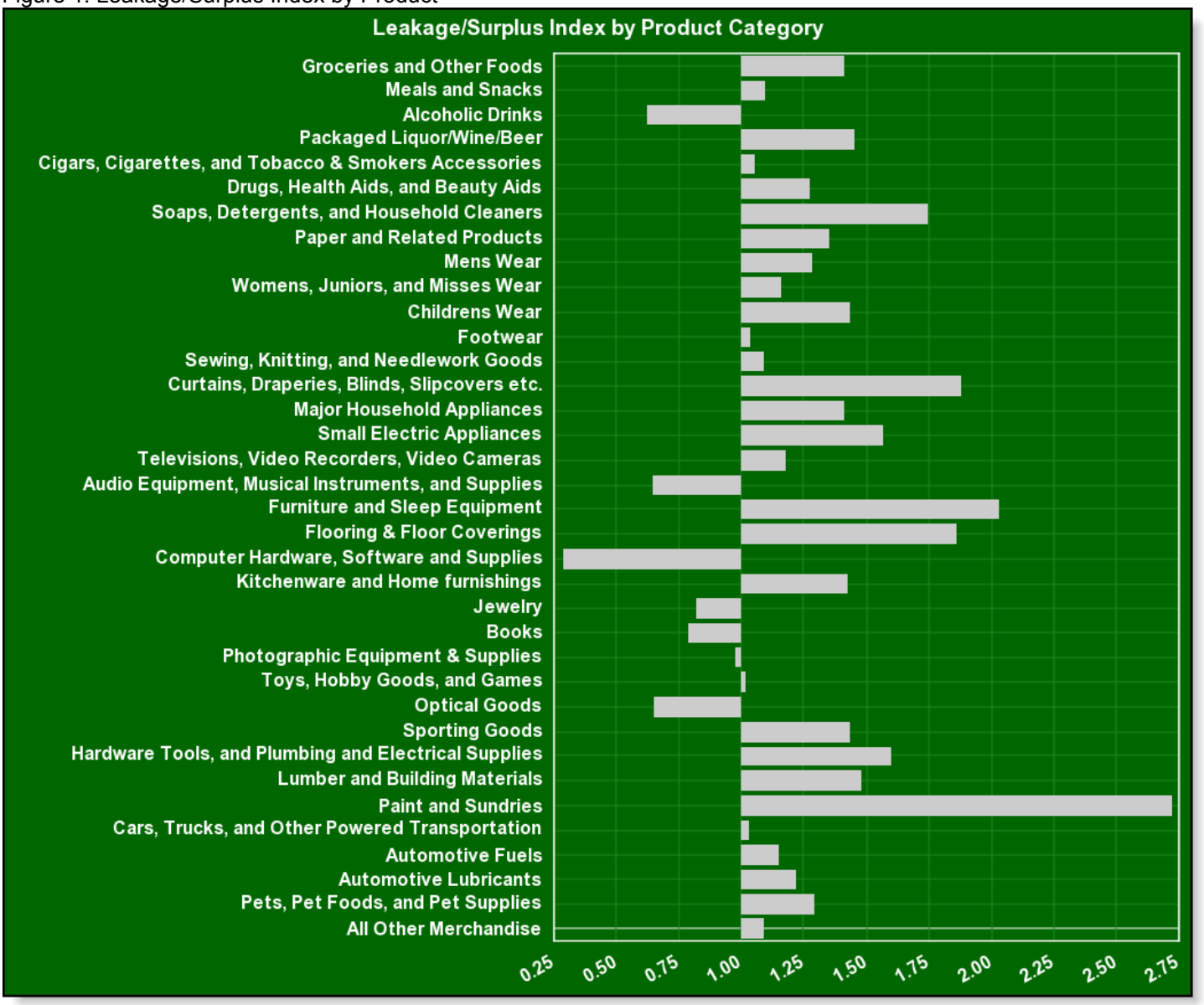
Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time

Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product



Buxton
Identifying Customers

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time

The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	155,668,339	219,618,808	1.4
Meals and Snacks	112,335,244	122,716,270	1.1
Alcoholic Drinks	13,471,662	8,400,432	0.6
Packaged Liquor/Wine/Beer	20,778,005	30,176,394	1.5
Cigars, Cigarettes, and Tobacco & Smokers Accessories	25,676,504	27,009,800	1.1
Drugs, Health Aids, and Beauty Aids	73,044,600	93,001,762	1.3
Soaps, Detergents, and Household Cleaners	7,549,342	13,182,893	1.7
Paper and Related Products	7,719,443	10,447,998	1.4
Mens Wear	24,814,549	31,888,185	1.3
Womens, Juniors, and Misses Wear	46,134,072	53,308,389	1.2
Childrens Wear	12,283,538	17,626,113	1.4
Footwear	18,787,848	19,425,783	1.0
Sewing, Knitting, and Needlework Goods	2,056,543	2,235,997	1.1
Curtains, Draperies, Blinds, Slipcovers etc.	8,560,235	16,072,968	1.9
Major Household Appliances	10,183,683	14,356,223	1.4
Small Electric Appliances	3,501,670	5,481,153	1.6
Televisions, Video Recorders, Video Cameras	9,086,642	10,688,665	1.2
Audio Equipment, Musical Instruments, and Supplies	14,570,163	9,366,892	0.6
Furniture and Sleep Equipment	22,581,302	45,893,118	2.0
Flooring & Floor Coverings	11,027,483	20,540,589	1.9
Computer Hardware, Software and Supplies	29,723,380	8,476,802	0.3
Kitchenware and Home furnishings	17,724,474	25,225,301	1.4
Jewelry	15,173,257	12,467,961	0.8
Books	7,292,337	5,733,850	0.8
Photographic Equipment & Supplies	3,478,498	3,389,265	1.0
Toys, Hobby Goods, and Games	11,691,721	11,867,223	1.0
Optical Goods	3,264,232	2,115,094	0.6
Sporting Goods	19,651,953	28,199,181	1.4
Hardware Tools, and Plumbing and Electrical Supplies	86,063,451	137,406,558	1.6
Lumber and Building Materials	69,345,399	102,737,789	1.5
Paint and Sundries	10,443,865	28,443,106	2.7
Cars, Trucks, and Other Powered Transportation	203,114,436	209,331,922	1.0
Automotive Fuels	93,754,035	107,529,395	1.1
Automotive Lubricants	42,893,802	52,188,837	1.2
Pets, Pet Foods, and Pet Supplies	5,779,297	7,480,332	1.3
All Other Merchandise	43,817,328	47,686,156	1.1

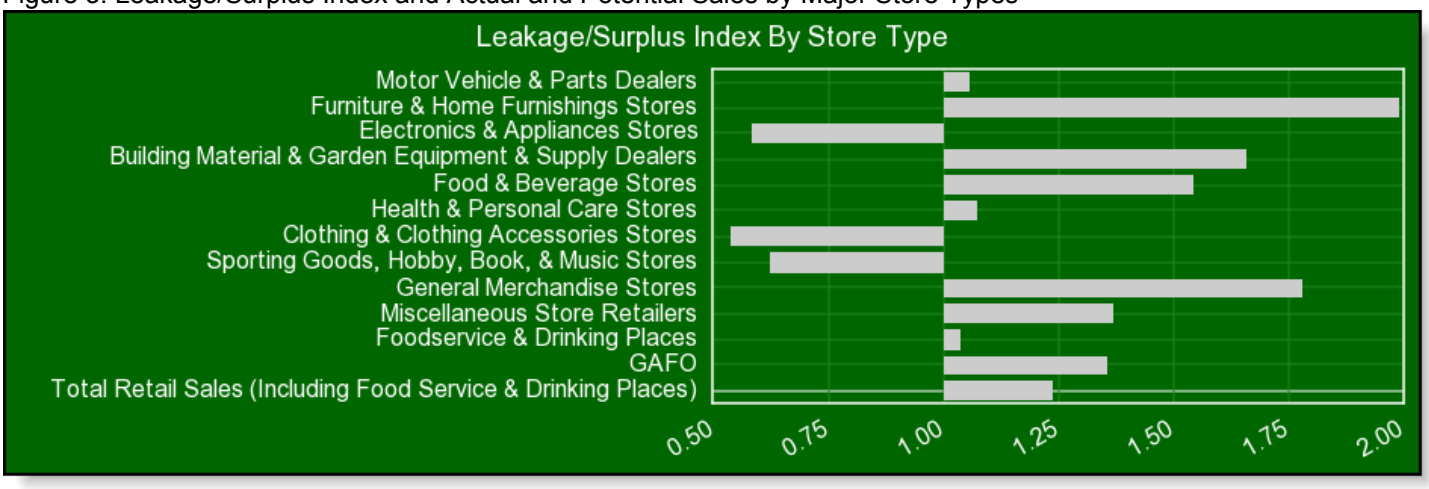
Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



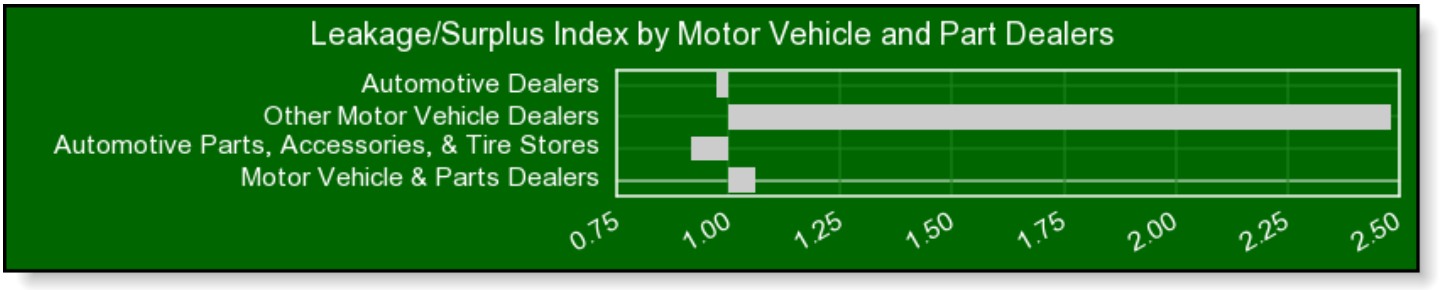
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	251,781,061	266,569,160	1.06
Furniture & Home Furnishings Stores	35,478,890	70,581,222	1.99
Electronics & Appliances Stores	31,202,427	18,209,743	0.58
Building Material & Garden Equipment & Supply Dealers	154,259,516	256,104,002	1.66
Food & Beverage Stores	137,734,946	212,833,625	1.55
Health & Personal Care Stores	57,060,425	61,242,832	1.07
Clothing & Clothing Accessories Stores	60,625,638	32,693,334	0.54
Sporting Goods, Hobby, Book, & Music Stores	25,456,445	15,868,665	0.62
General Merchandise Stores	150,004,593	266,862,724	1.78
Miscellaneous Store Retailers	35,142,086	48,139,774	1.37
Foodservice & Drinking Places	116,885,829	121,339,023	1.04
GAFO	316,955,810	430,567,060	1.36
Total Retail Sales (Including Food Service & Drinking Places)	1,263,042,337	1,561,717,215	1.24

*** GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.**

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time

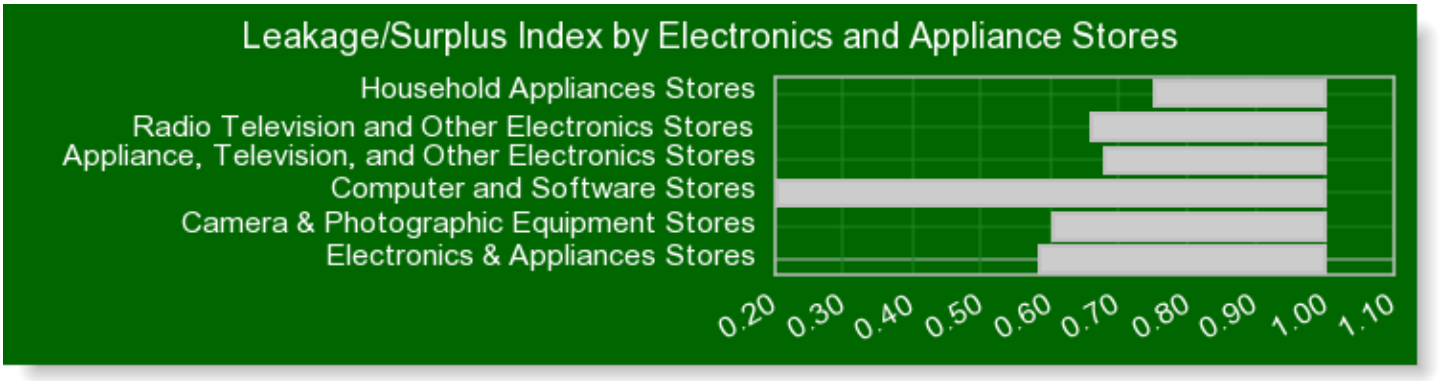
Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identity possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	217,884,214	212,144,520	0.97
Other Motor Vehicle Dealers	14,940,818	37,090,375	2.48
Automotive Parts, Accessories, & Tire Stores	18,956,028	17,334,263	0.91
Motor Vehicle & Parts Dealers	251,781,061	266,569,160	1.06

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	5,254,952	3,953,015	0.75
Radio Television and Other Electronics Stores	18,539,684	12,236,159	0.66
Appliance, Television, and Other Electronics Stores	23,794,637	16,189,174	0.68
Computer and Software Stores	6,103,202	1,233,169	0.20
Camera & Photographic Equipment Stores	1,304,587	787,398	0.60
Electronics & Appliances Stores	31,202,427	18,209,743	0.58

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	18,603,911	40,000,979	2.15
Home Furnishing Stores	16,874,978	30,580,242	1.81
Furniture & Home Furnishings Stores	35,478,890	70,581,222	1.99

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	53,351,473	161,584,014	3.03
Paint and Wallpaper Stores	3,519,220	11,098,598	3.15
Hardware Stores	11,001,766	19,254,041	1.75
Building Materials, Lumberyards	24,845,716	20,307,788	0.82
Other Building Materials Dealers	72,326,818	59,551,689	0.82
Building Material & Supply Dealers	140,199,278	251,488,343	1.79
Outdoor Power Equipment Stores	2,061,405	1,423,983	0.69
Nursery and Garden Centers	11,998,832	3,191,675	0.27
Lawn and Garden Equipment and Supplies Stores	14,060,238	4,615,658	0.33
Building Material & Garden Equipment & Supply Dealers	154,259,516	256,104,002	1.66

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	117,574,365	193,255,979	1.64
Convenience Stores	6,670,371	1,365,779	0.20
Grocery Stores	124,244,737	194,621,759	1.57
Specialty Food Stores	4,067,912	2,276,685	0.56
Beer, Wine, & Liquor Stores	9,422,296	15,935,180	1.69
Food & Beverage Stores	137,734,946	212,833,625	1.55

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	48,774,455	55,106,384	1.13
Cosmetics, Beauty Supplies and Perfume Stores	1,993,189	58,206	0.03
Optical Goods Stores	2,738,307	1,726,430	0.63
Other Health and Personal Care Stores	3,554,473	4,351,811	1.22
Health & Personal Care Stores	57,060,425	61,242,832	1.07

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



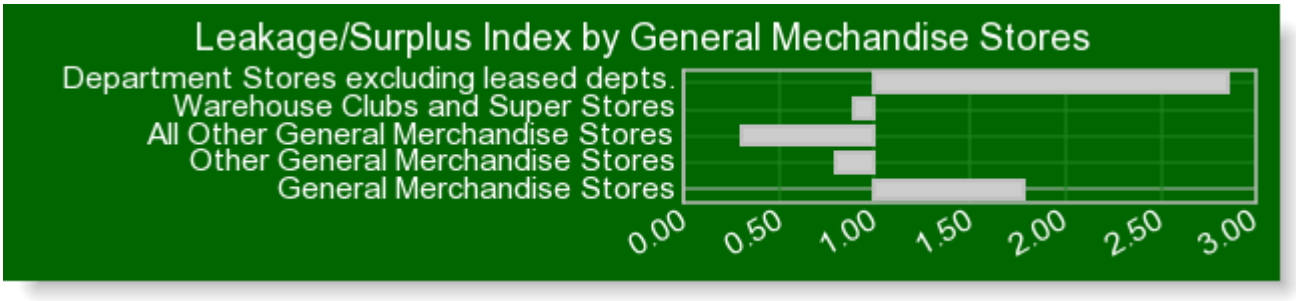
Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	2,706,839	1,769,758	0.65
Womens Clothing Stores	11,052,193	7,615,061	0.69
Childrens and Infants Clothing Stores	2,492,592	0	0.00
Family Clothing Stores	22,959,606	10,387,142	0.45
Clothing Accessories Stores	1,026,771	46,173	0.05
Other Clothing Stores	2,890,899	353,967	0.12
Clothing Stores	43,128,903	20,172,104	0.47
Shoe Stores	8,456,967	7,690,767	0.91
Jewelry Stores	8,335,627	4,830,463	0.58
Luggage, & Leather Goods Stores	704,140	0	0.00
Jewelry, Luggage, & Leather Goods Stores	9,039,768	4,830,463	0.53
Clothing & Clothing Accessories Stores	60,625,638	32,693,334	0.54

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



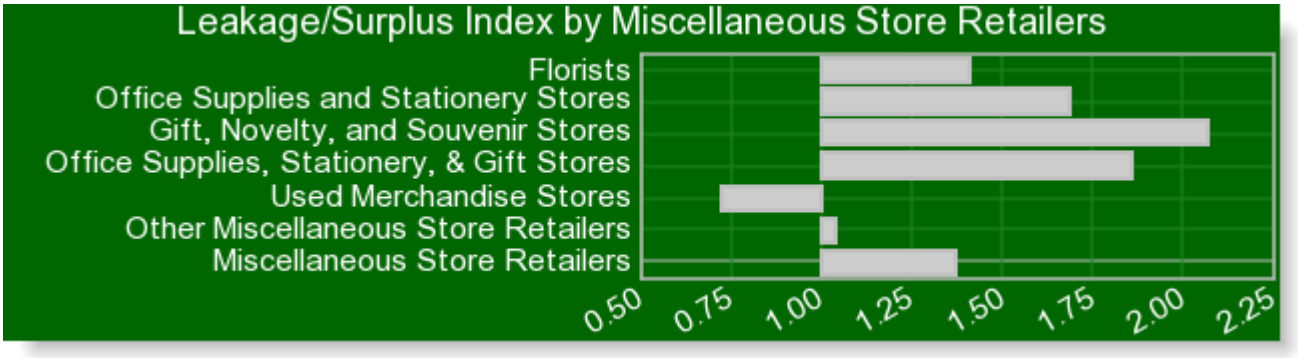
Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	9,443,179	8,202,325	0.87
Hobby, Toys and Games Stores	5,749,767	2,087,389	0.36
Sew/Needlework/Piece Goods Stores	1,295,649	1,128,311	0.87
Musical Instrument and Supplies Stores	1,677,191	877,284	0.52
Sporting Goods, Hobby, & Musical Instrument Stores	18,165,787	12,295,310	0.68
Book Stores	4,447,672	3,018,561	0.68
News Dealers and Newsstands	289,348	0	0.00
Book Stores and News Dealers	4,737,021	3,018,561	0.64
Prerecorded Tape, Compact Disc, and Record Stores	2,553,637	554,793	0.22
Book, Periodical, & Music Stores	7,290,658	3,573,354	0.49
Sporting Goods, Hobby, Book, & Music Stores	25,456,445	15,868,665	0.62

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



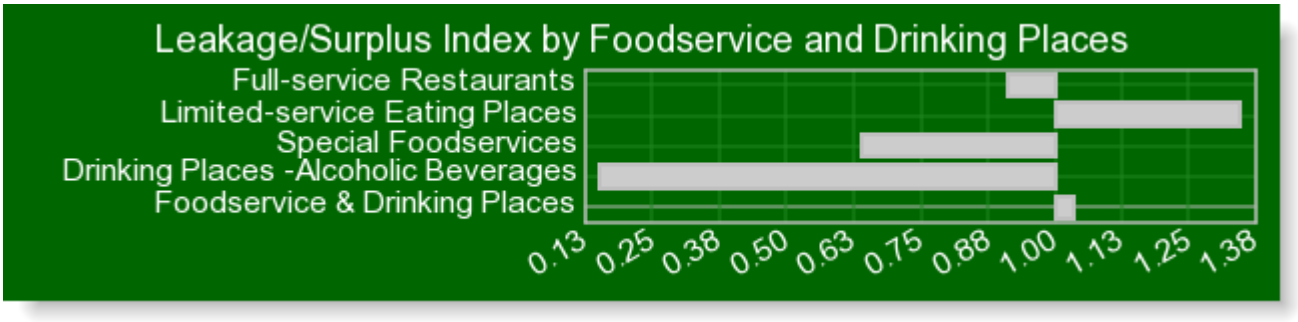
General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	71,523,775	204,210,171	2.86
Warehouse Clubs and Super Stores	66,879,971	59,218,558	0.89
All Other General Merchandise Stores	11,600,846	3,433,994	0.30
Other General Merchandise Stores	78,480,817	62,652,553	0.80
General Merchandise Stores	150,004,593	266,862,724	1.78

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	2,533,834	3,579,452	1.41
Office Supplies and Stationery Stores	8,000,027	13,534,338	1.69
Gift, Novelty, and Souvenir Stores	6,187,787	12,817,032	2.07
Office Supplies, Stationery, & Gift Stores	14,187,814	26,351,370	1.86
Used Merchandise Stores	2,982,278	2,157,900	0.72
Other Miscellaneous Store Retailers	15,438,158	16,051,051	1.04
Miscellaneous Store Retailers	35,142,086	48,139,774	1.37

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time



Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	53,210,694	48,584,771	0.91
Limited-service Eating Places	48,924,313	65,873,607	1.35
Special Foodservices	9,446,474	6,079,168	0.64
Drinking Places -Alcoholic Beverages	5,304,346	801,477	0.15
Foodservice & Drinking Places	116,885,829	121,339,023	1.04

Site	Address	Analysis Geography
2	Armstrong Blvd and Sunwood Dr Ramsey, MN 55303	12 minute drive time

Sources and Methodology

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

Supply estimates are generated from the Census of Retail Trade, a component of the Economic Census. County-level sales tax data is allocated to low levels of geography using business sales estimates, business locations, and employee counts provided by Claritas' Business Facts® database. Supply includes all products sold at retail outlets in a specified area for a one-year period. Supply is defined as the estimated total retail sales for a retail store type or merchandise line item.

Source: Retail Market Power™ (Claritas).

Appendix B:

Demographic Report

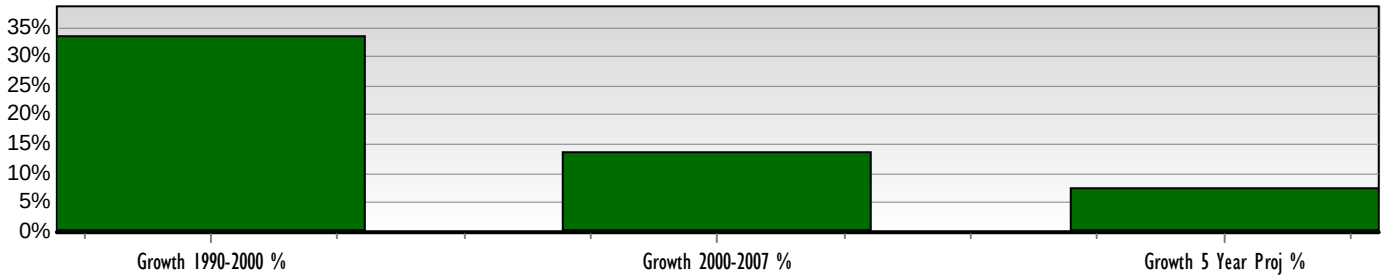
Demographics

Analysis Geography: State Hwy 47 & 167th Ave
Ramsey, MN

Date: 8/17/2008

Population Profile	12 Min Drive Time
2012 Projection	45,230
2007 Estimate	42,128
2000 Census	37,027
1990 Census	27,743

Population Change

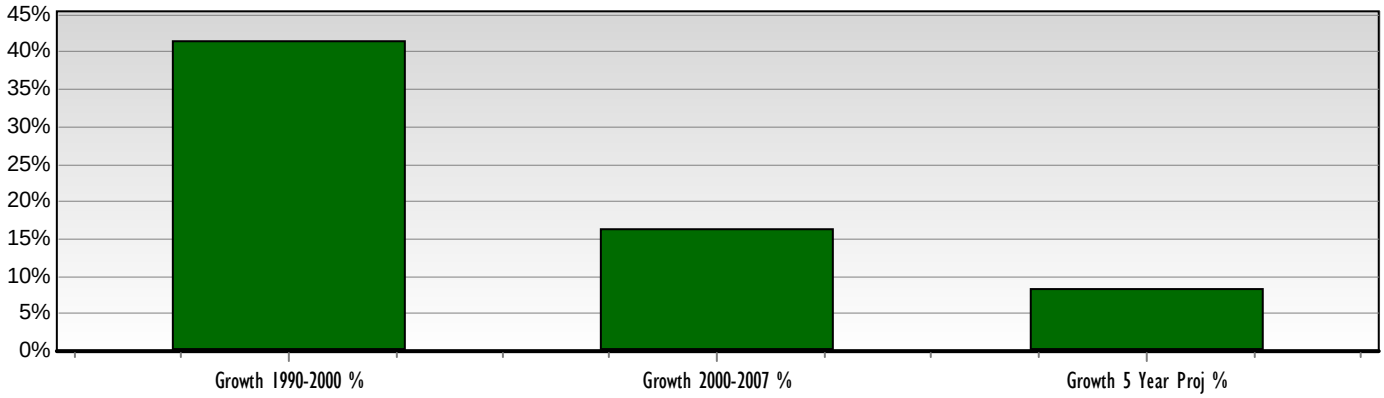


Work Place Population	12 Min Drive Time
Total	24,557

Household Profile

2012 Projection	15,956
2007 Estimate	14,733
2000 Census	12,675
1990 Census	8,960

Household Change



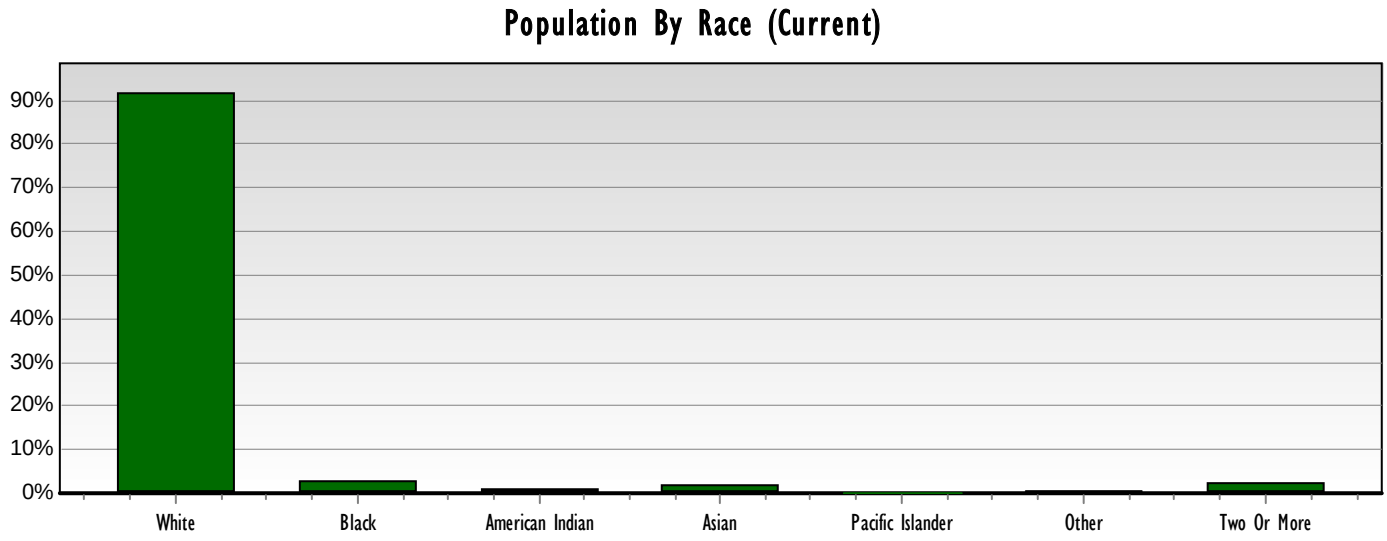
Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

Analysis Geography: State Hwy 47 & 167th Ave
Ramsey, MN

Date: 8/17/2008

Population By Race (Current)

	12 Min Drive Time
White	38,600
Black	1,189
American Indian	306
Asian	828
Pacific Islander	7
Other	255
Two Or More	943
Total Population By Race	**42,128**



Population By Hispanic Origin (Current)

	12 Min Drive Time
Hispanic Origin	1,088
Non Hispanic Origin	41,040

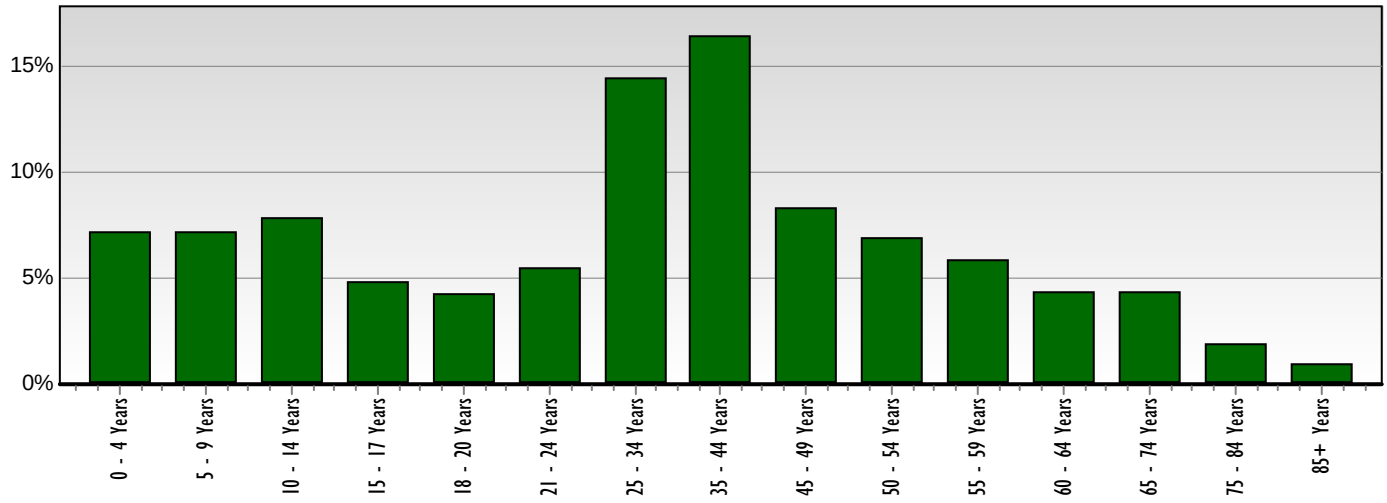
Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

Analysis Geography: State Hwy 47 & 167th Ave
Ramsey, MN

Date: 8/17/2008

Population By Age (Current)	12 Min Drive Time
0 to 4 years	3,019
5 to 9 years	3,027
10 to 14 years	3,292
15 to 17 years	2,037
18 to 20 years	1,777
21 to 24 years	2,293
25 to 34 years	6,071
35 to 44 years	6,914
45 to 49 years	3,494
50 to 54 years	2,910
55 to 59 years	2,462
60 to 64 years	1,818
65 to 74 years	1,840
75 to 84 years	791
85+ Years	383
Total Population By Age	**42,128**
Average Age	34.4
Median Age	35.0

Population By Age (Current)

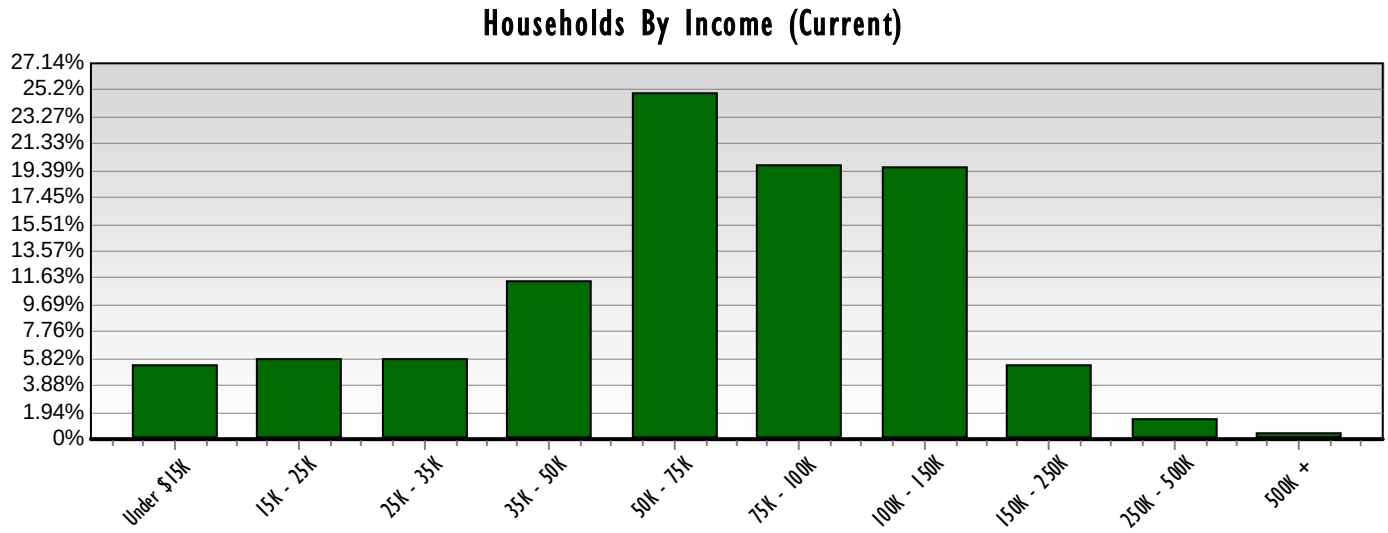


Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

Analysis Geography: State Hwy 47 & 167th Ave
Ramsey, MN

Date: 8/17/2008

Households By Income (Current)	12 Min Drive Time
Under $15,000	793
$15,000 to $24,999	856
$25,000 to $34,999	852
$35,000 to $49,999	1,679
$50,000 to $74,999	3,680
$75,000 to $99,999	2,914
$100,000 to $149,999	2,888
$150,000 to $249,999	781
$250,000 to $499,999	220
$500,000 +	70
Total Households By Income	**14,733**
Average Household Income	$83,052
Per Capita Income	$30,393
Median Household Income	$71,827



Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

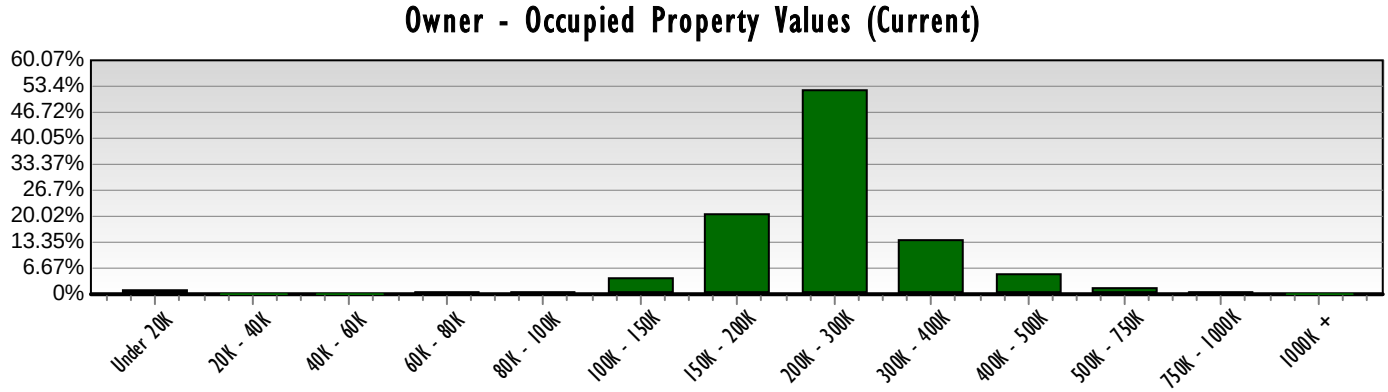
Analysis Geography: State Hwy 47 & 167th Ave
Ramsey, MN

Date: 8/17/2008

Housing Units By Occupancy (Current)	12 Min Drive Time
Owner - Occupied	80.0%
Renter - Occupied	17.8%
Vacant	2.2%

Owner - Occupied Property Values (Current)

Under $20,000	111
$20,000 to $39,999	18
$40,000 to $59,999	18
$60,000 to $79,999	43
$80,000 to $99,999	34
$100,000 to $149,999	503
$150,000 to $199,999	2,472
$200,000 to $299,999	6,308
$300,000 to $399,999	1,639
$400,000 to $499,999	625
$500,000 to $749,999	205
$750,000 to $999,999	39
$1,000,000 +	30
Total Owner - Occupied Property Values	**12,045**
Median Property Value	**228,066**



Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

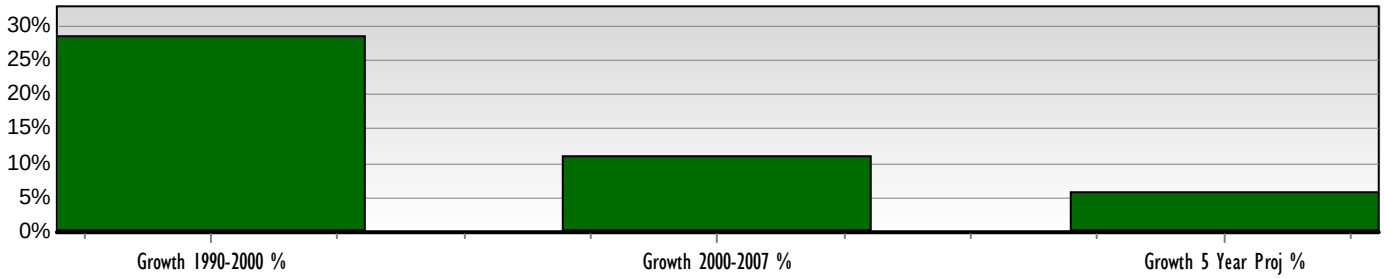
Demographics

Analysis Geography: Armstrong Blvd & Sunwood Dr
Ramsey, MN

Date: 8/17/2008

Population Profile	12 Min Drive Time
2012 Projection	38,802
2007 Estimate	36,651
2000 Census	32,969
1990 Census	25,670

Population Change

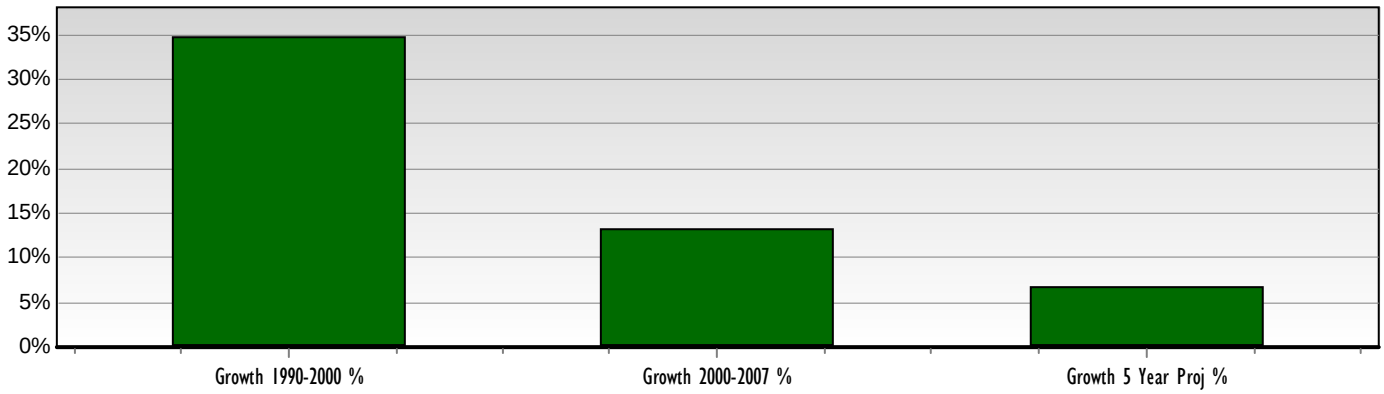


Work Place Population	12 Min Drive Time
Total	24,390

Household Profile

2012 Projection	14,474
2007 Estimate	13,554
2000 Census	11,960
1990 Census	8,877

Household Change



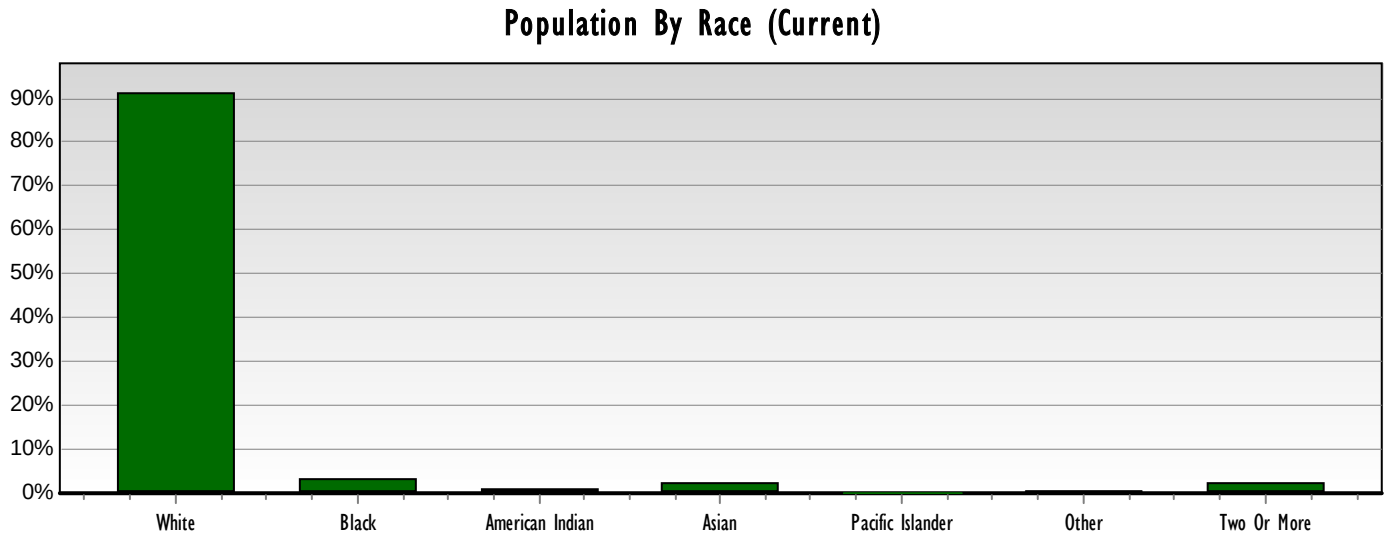
Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

Analysis Geography: Armstrong Blvd & Sunwood Dr
Ramsey, MN

Date: 8/17/2008

Population By Race (Current)

	12 Min Drive Time
White	33,410
Black	1,101
American Indian	290
Asian	756
Pacific Islander	13
Other	232
Two Or More	849
Total Population By Race	**36,651**



Population By Hispanic Origin (Current)

	12 Min Drive Time
Hispanic Origin	999
Non Hispanic Origin	35,652

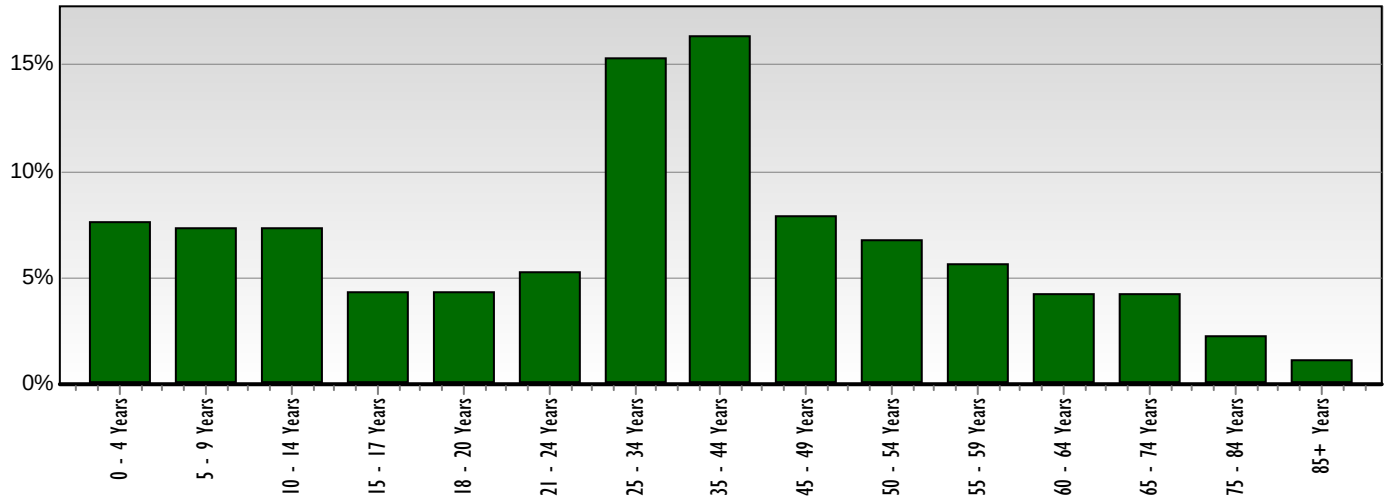
Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

Analysis Geography: Armstrong Blvd & Sunwood Dr
Ramsey, MN

Date: 8/17/2008

Population By Age (Current)	12 Min Drive Time
0 to 4 years	2,797
5 to 9 years	2,675
10 to 14 years	2,679
15 to 17 years	1,575
18 to 20 years	1,572
21 to 24 years	1,934
25 to 34 years	5,609
35 to 44 years	5,996
45 to 49 years	2,892
50 to 54 years	2,477
55 to 59 years	2,076
60 to 64 years	1,534
65 to 74 years	1,566
75 to 84 years	840
85+ Years	429
Total Population By Age	**36,651**
Average Age	34.6
Median Age	34.8

Population By Age (Current)

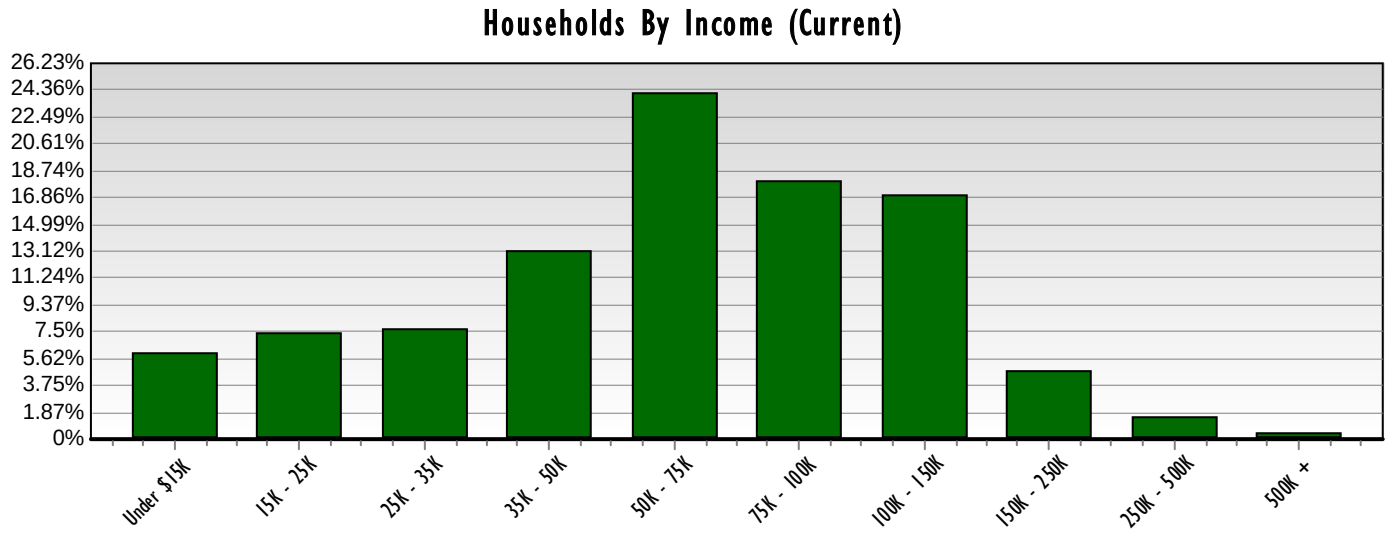


Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

Analysis Geography: Armstrong Blvd & Sunwood Dr
Ramsey, MN

Date: 8/17/2008

Households By Income (Current)	12 Min Drive Time
Under $15,000	808
$15,000 to $24,999	997
$25,000 to $34,999	1,038
$35,000 to $49,999	1,770
$50,000 to $74,999	3,272
$75,000 to $99,999	2,446
$100,000 to $149,999	2,308
$150,000 to $249,999	634
$250,000 to $499,999	215
$500,000 +	66
Total Households By Income	**13,554**
Average Household Income	$78,691
Per Capita Income	$30,604
Median Household Income	$67,373



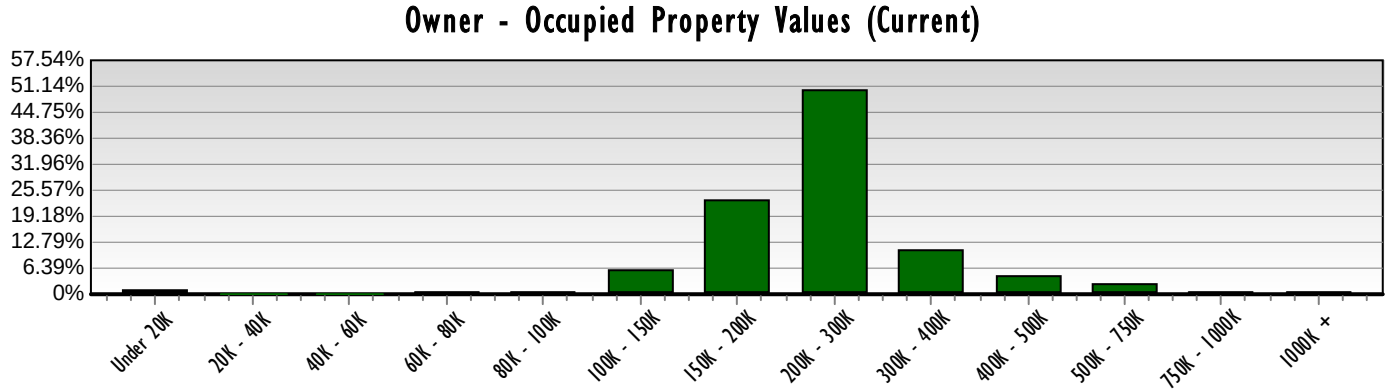
Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008

Analysis Geography: Armstrong Blvd & Sunwood Dr
Ramsey, MN

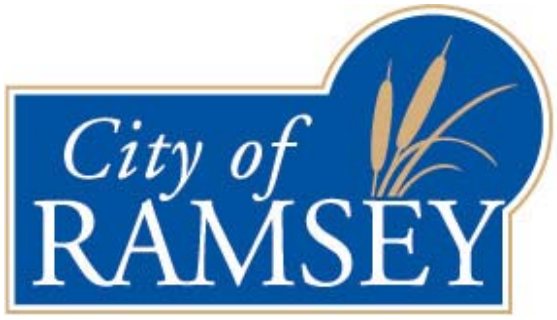
Date: 8/17/2008

Housing Units By Occupancy (Current)	12 Min Drive Time
Owner - Occupied	72.5%
Renter - Occupied	25.1%
Vacant	2.5%

Owner - Occupied Property Values (Current)	
Under $20,000	105
$20,000 to $39,999	12
$40,000 to $59,999	9
$60,000 to $79,999	34
$80,000 to $99,999	48
$100,000 to $149,999	601
$150,000 to $199,999	2,329
$200,000 to $299,999	5,051
$300,000 to $399,999	1,068
$400,000 to $499,999	466
$500,000 to $749,999	253
$750,000 to $999,999	56
$1,000,000 +	38
Total Owner - Occupied Property Values	**10,070**
Median Property Value	**217,284**



Data Sources: Buxton®, Claritas, Inc., Prizm NE®, © 2008, infoUSA, Inc., © 2008, National Research Bureau, © 2008, Mediamark Research, Inc., © 2008, Geographic Data Technology, Inc, © 2008





Retail Site Assessment

July 2011

DRAFT

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Selecting Ramsey's Retail Site 1

Retail Site 1 Analysis..... 2

Retail Site 2 Analysis..... 4

Appendix A: Leakage and Demand Analysis

Appendix B: Segmentation Guide

Buxton Community*ID* Staff

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Selecting Ramsey's Retail Site

To begin the Community*ID* process, the City of Ramsey selected two sites to be analyzed for possible retail development or revitalization. The locations of the two sites are shown on the following page.

Buxton has examined the retail potential of the two sites based on the following analyses:

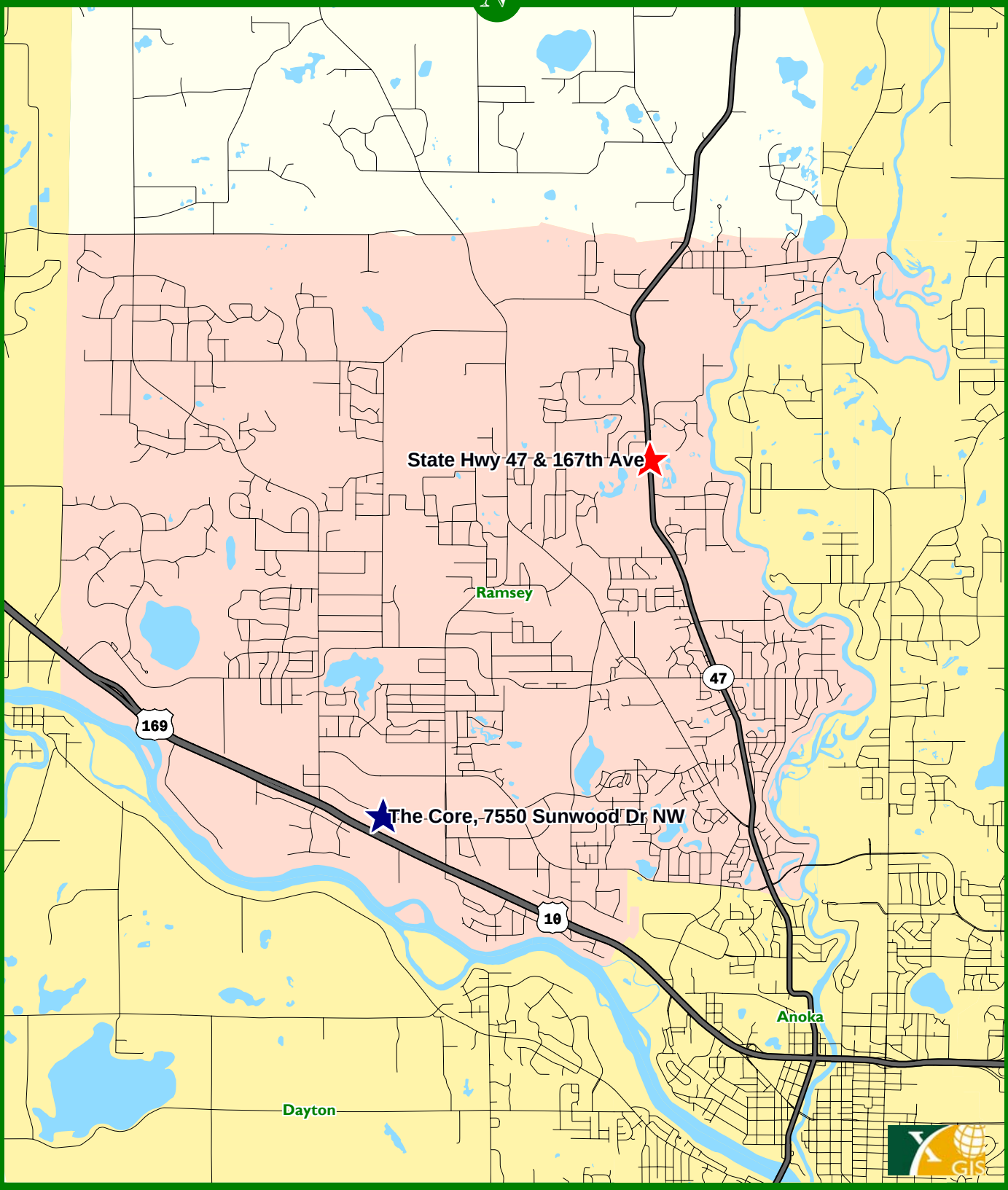
- A primary drive-time trade area was delineated for each site
- The customers in each trade area were segmented according to buying habits and lifestyles
- A profile of Ramsey's customers within each of the two trade areas was developed
- The surplus and leakage for 11 major store types and 49 minor store types were determined for the trade area

The purpose of these analyses is to develop Ramsey's Customer Profile. The Customer Profile is a snapshot of the customers that reside in Ramsey's trade area. Even though these consumers are complex and diverse, Buxton is able to capture and catalogue the extent to which potential demand for a retailer's goods and services are being met within the trade area.

By overlaying Ramsey's Customer Profile with over 4,500 retail matching profiles in Buxton's proprietary database, we are able to identify major categories of retail that are candidates for location in Ramsey. This matching provides the basis for determining Ramsey's viability to attract retailers and restaurants and forms the basis for Buxton's recommendations and conclusions.

With this analysis and Buxton's recommendations, Ramsey can make a more informed decision about investments in infrastructure and can focus resources on areas of higher retail development potential.

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Ramsey, Minnesota: Overview

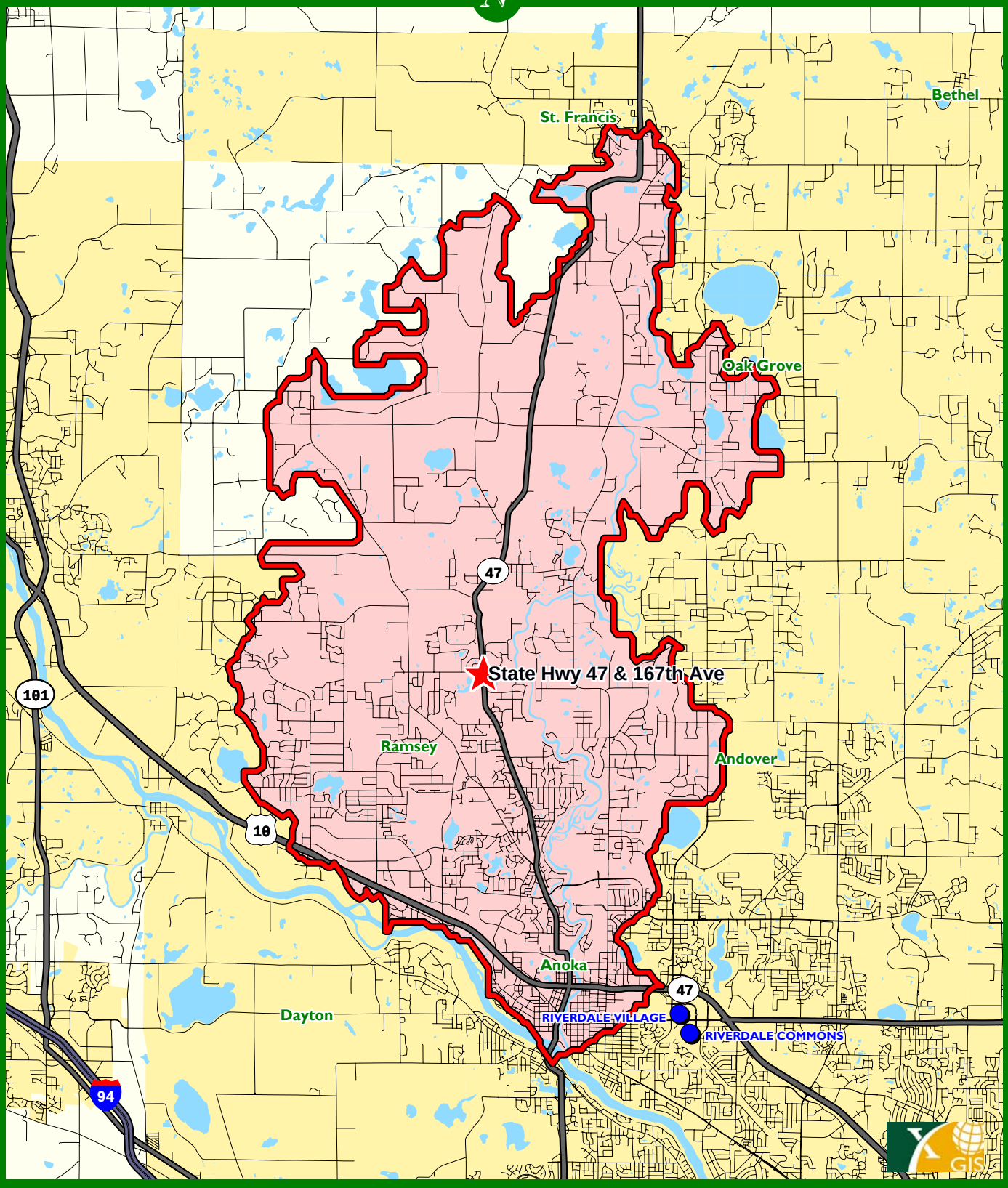
Shopping Centers
GLA in thousands
1000+
500 to 1000

City Limits
Site 1
Site 2

Miles
0 0.5 1

2651 S. Polaris Dr. Fort Worth, Texas 76137 tel: 817.332.3681 fax:817.332.3686 e-mail:buxton@buxtonco.com http://www.buxtonco.com

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Ramsey, Minnesota: Trade Area

City of Ramsey — The Cor

CommunityID

Shopping Centers

GLA in thousands

1000+

500 to 1000

12 Minute Drive Time

Site 1

Miles

0 1 2

2651 S. Polaris Dr. Fort Worth, Texas 76137 tel: 817.332.3681 fax:817.332.3686 e-mail:buxton@buxtonco.com http://www.buxtonco.com

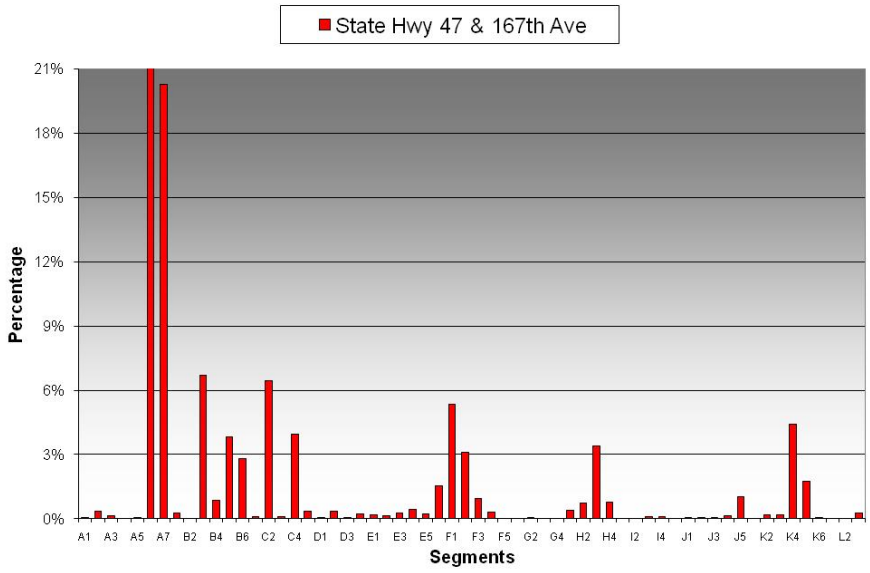
Site 1 Analysis: State Highway 47 & 167th Avenue

Drive-Time Trade Area

The map on the previous page depicts the primary trade area for Site 1. The primary trade area consists of a twelve-minute polygon, determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within a twelve-minute drive-time of Site 1 is presented below.



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Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. By determining dominant segments and reviewing their segment descriptions, lifestyle habits and preferences can be identified. Please refer to Appendix C for additional segment description information.

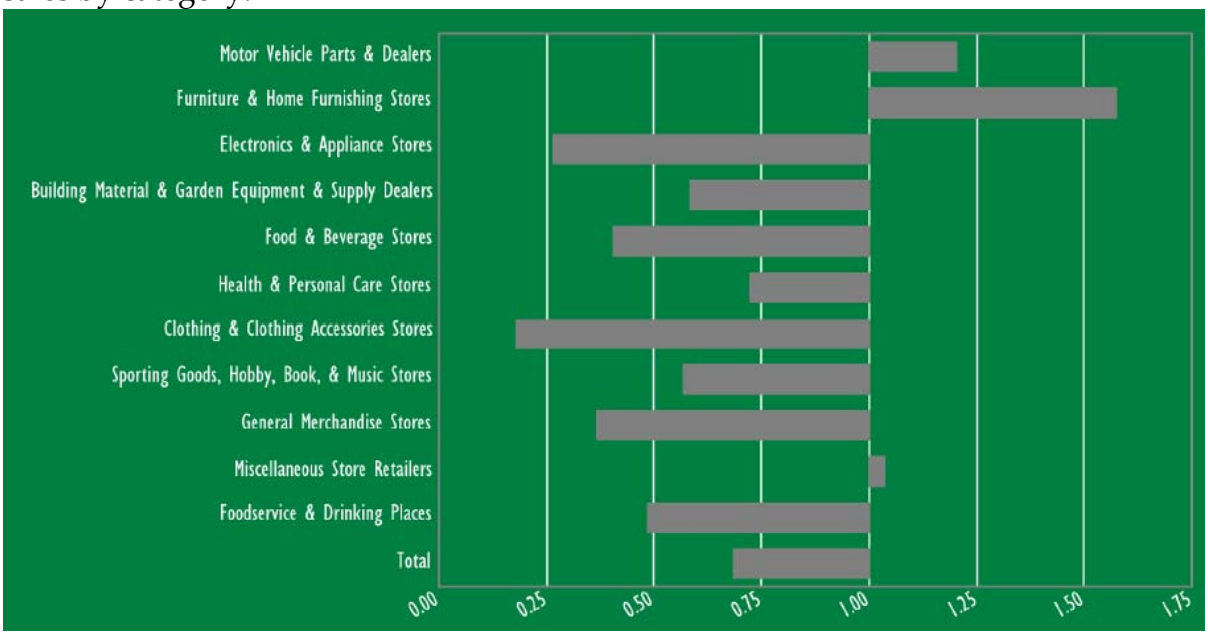
Dominant Segments	Description	Households
A06	Small-town Success	5,050
A07	New Suburbia Families	3,786
B03	Urban Commuter Families	1,249
B05	Second-generation Success	711
C02	Prime Middle America	1,208
C04	Family Convenience	741
F01	Steadfast Conservatives	999
F02	Moderate Conventionalists	581
H03	Stable Careers	639
K04	Urban Diversity	822

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Site 1 Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



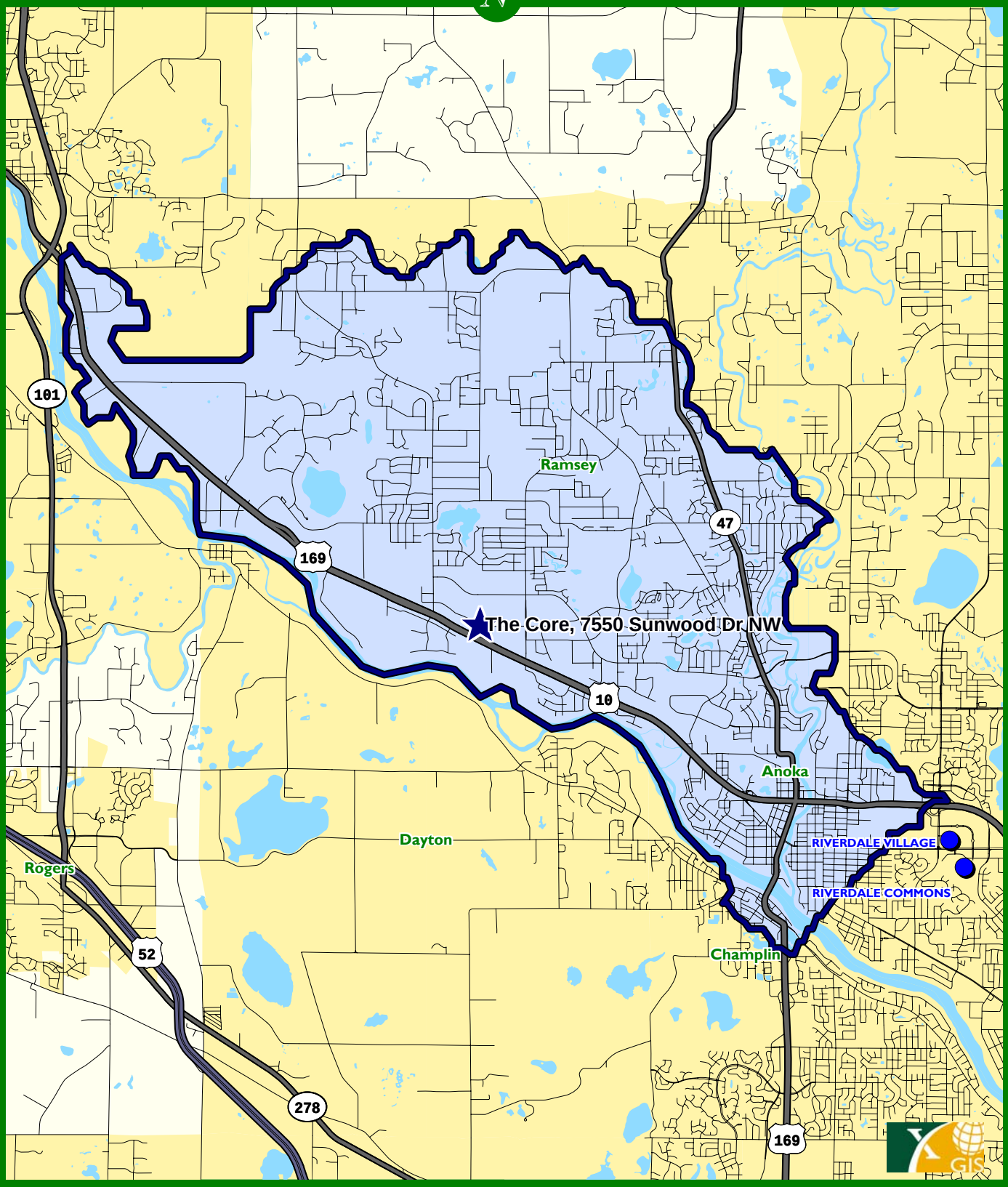
Source: Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000: Census Estimates and Projections 2008 Data

The following table presents the trade potential variables for Site 1:

Trade Potential Variables	Site 1
Estimated Household Count	18,678
Number of Households in Dominant Segments	15,786
Traffic Count	9,600
Total Demand	$629,316,309
Total Supply	$432,123,888
Leakage	($197,192,421)

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Ramsey, Minnesota: Trade Area

City of RAMSEY THE COR

CommunityID

Shopping Centers

GLA in thousands

1000+

500 to 1000

12 Minute Drive Time

Site 2

Miles

0 1 2

2651 S. Polaris Dr. Fort Worth, Texas 76137 tel: 817.332.3681 fax:817.332.3686 e-mail:buxton@buxtonco.com http://www.buxtonco.com

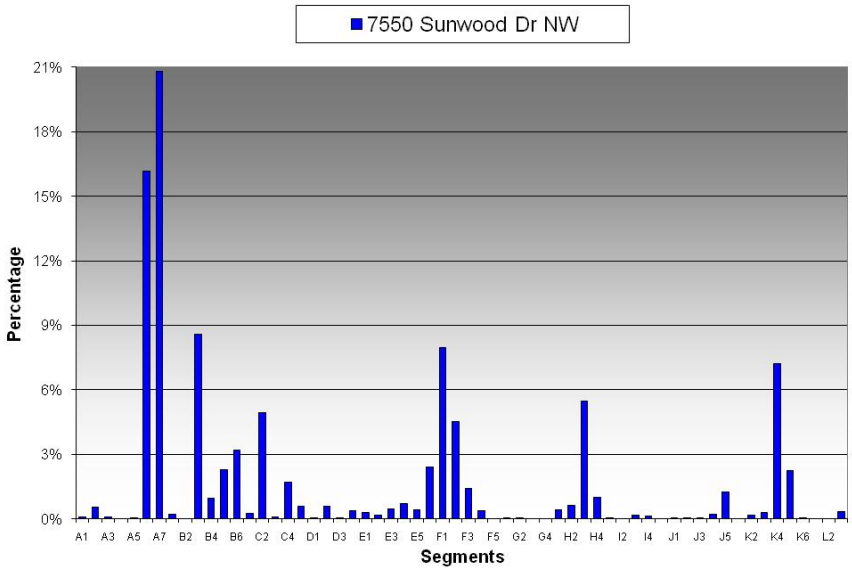
Site 2 Analysis: 7550 Sunwood Drive NW

Drive-Time Trade Area

The map on the previous page depicts the primary trade area for Site 2. The primary trade area consists of a twelve-minute polygon, determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within a twelve-minute drive-time of Site 2 is presented below.



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Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. By determining dominant segments and reviewing their segment descriptions, lifestyle habits and preferences can be identified. Please refer to Appendix C for additional segment description information.

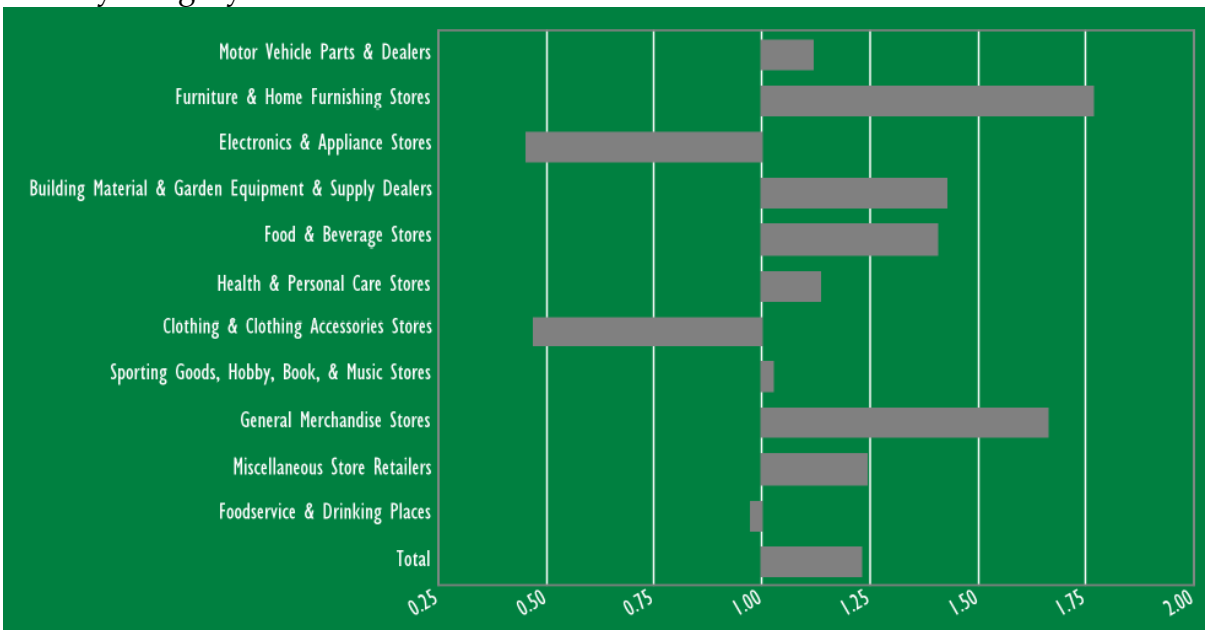
Dominant Segments	Description	Households
A06	Small-town Success	2,188
A07	New Suburbia Families	2,812
B03	Urban Commuter Families	1,158
B06	Successful Suburbia	430
C02	Prime Middle America	669
F01	Steadfast Conservatives	1,074
F02	Moderate Conventionalists	613
H03	Stable Careers	742
K04	Urban Diversity	973

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Site 2 Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



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The following table presents the trade potential variables for Site 2:

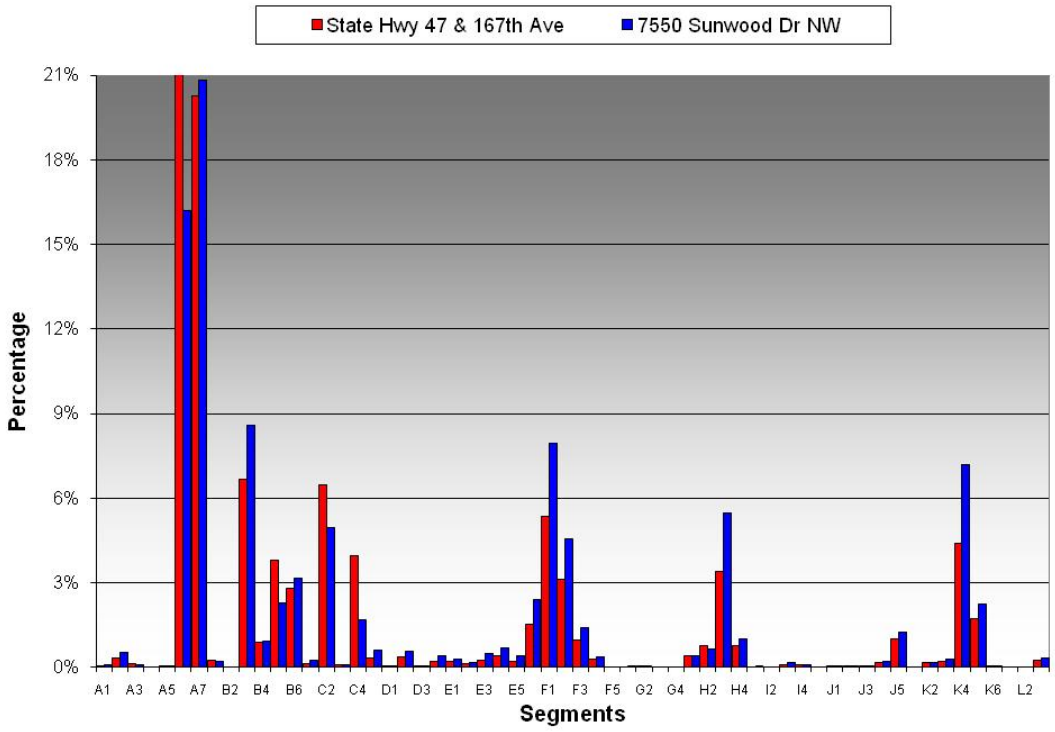
Trade Potential Variables	Site 2
Estimated Household Count	13,514
Number of Households in Dominant Segments	10,659
Traffic Count	37,500
Total Demand	$955,227,451
Total Supply	$1,175,177,367
Surplus	$219,949,916

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Site Comparison

Trade Area Segmentation

This side by side comparison of the two trade areas shows the compositions and characteristics of the households to be very similar. This is not unusual and can be expected in an area with potential sites in close proximity.



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12- Minute Trade Area Statistics

Trade Potential Variables	Site 1	Site 2
Estimated Household Count	18,678	13,514
Number of Households in Dominant Segments	15,786	10,659
Traffic Count	9,600	37,500
Total Demand	$629,316,309	$955,227,451
Total Supply	$432,123,888	$1,175,177,367
Leakage/Surplus	($197,192,421)	$219,949,916

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Appendix A:

Leakage Analysis

Buxton
IDentifying Customers

Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

-Indicating how well the retail needs of local residents are being met
-Uncovering unmet demand and possible opportunities
-Understanding the strengths and weaknesses of the local retail sector
-Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

Interpreting Leakage Index

1.0 = equilibrium, meaning that demand and sales in the area being analyzed are in balance.

.80 = demand exceeds sales by 20%, meaning that consumers are leaving the area being analyzed.

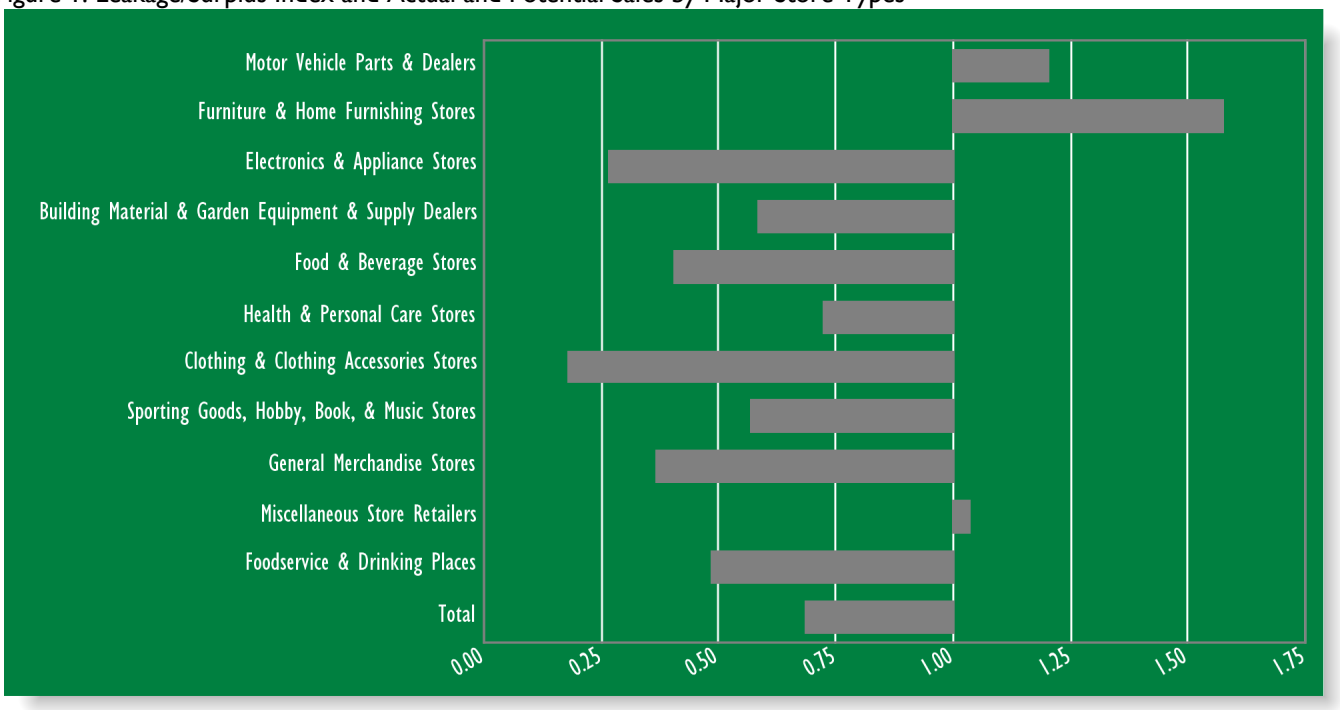
1.2 = sales exceed demand by 20%, meaning that consumers are coming from outside the area being analyzed.

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 1 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

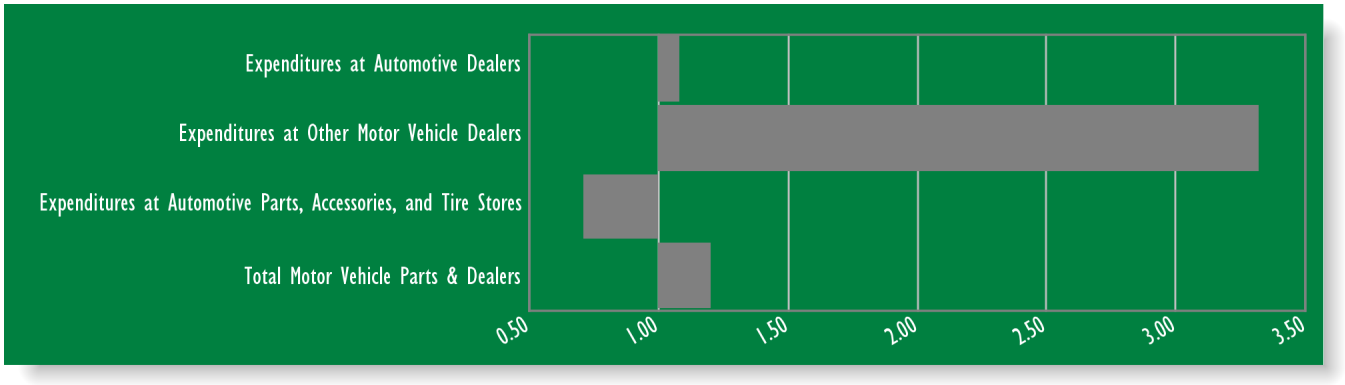
Figure 1. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	149,660,406	179,996,510	1.2
Furniture & Home Furnishing Stores	20,483,996	32,254,984	1.6
Electronics & Appliance Stores	18,142,728	4,881,670	0.3
Building Material & Garden Equipment & Supply Dealers	95,030,755	55,623,887	0.6
Food & Beverage Stores	82,693,348	33,582,484	0.4
Health & Personal Care Stores	32,900,745	23,862,895	0.7
Clothing & Clothing Accessories Stores	37,271,242	6,637,591	0.2
Sporting Goods, Hobby, Book, & Music Stores	14,909,907	8,496,836	0.6
General Merchandise Stores	90,365,546	33,130,570	0.4
Miscellaneous Store Retailers	19,917,598	20,599,947	1.0
Foodservice & Drinking Places	67,940,038	33,056,514	0.5
Total	629,316,309	432,123,888	0.7

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

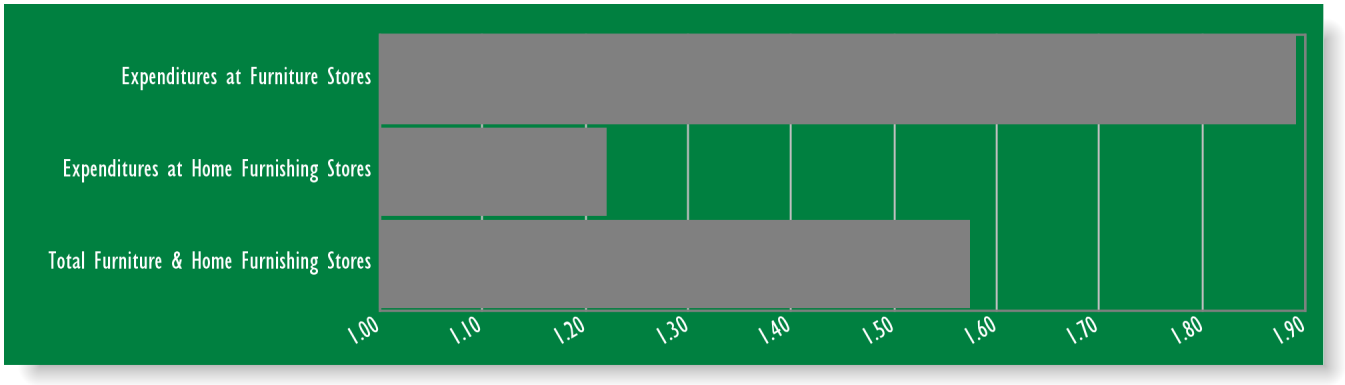
Sub-Categories of Motor Vehicle Parts & Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	129,146,720	140,545,858	1.1
Expenditures at Other Motor Vehicle Dealers	9,488,263	31,577,770	3.3
Expenditures at Automotive Parts, Accessories, and Tire Stores	11,025,422	7,872,882	0.7
Total Motor Vehicle Parts & Dealers	149,660,406	179,996,510	1.2

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

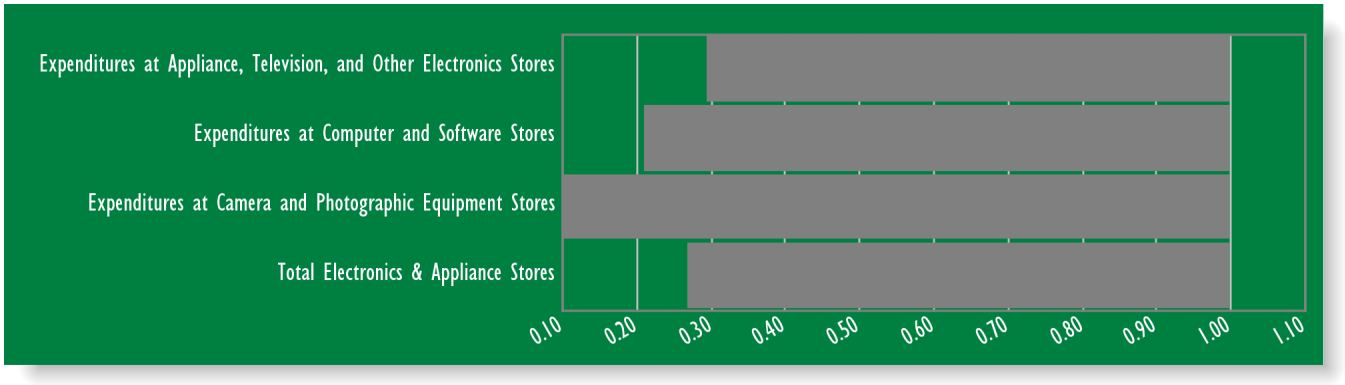
Sub-Categories of Furniture & Home Furnishing Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	10,789,586	20,413,743	1.9
Expenditures at Home Furnishing Stores	9,694,410	11,841,241	1.2
Total Furniture & Home Furnishing Stores	20,483,996	32,254,984	1.6

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Electronics & Appliance Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	13,631,944	4,017,476	0.3
Expenditures at Computer and Software Stores	3,752,604	788,295	0.2
Expenditures at Camera and Photographic Equipment Stores	758,179	75,899	0.1
Total Electronics & Appliance Stores	18,142,728	4,881,670	0.3

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Building Material & Garden Equipment & Supply Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	34,575,783	12,371,415	0.4
Expenditures at Paint and Wallpaper Stores	1,958,246	0	0.0
Expenditures at Hardware Stores	6,934,600	13,533,357	2.0
Expenditures at Other Building Materials Dealers	44,049,036	26,201,508	0.6
Expenditures at Outdoor Power Equipment Stores	1,100,267	1,054,116	1.0
Expenditures at Nursery and Garden Centers	6,412,824	2,463,490	0.4
Total Building Material & Garden Equipment & Supply Dealers	95,030,755	55,623,887	0.6

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Food & Beverage Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	70,980,489	26,613,050	0.4
Expenditures at Convenience Stores	3,969,048	748,888	0.2
Expenditures at Specialty Food Stores	2,285,507	770,966	0.3
Expenditures at Beer, Wine, and Liquor Stores	5,458,304	5,449,580	1.0
Total Food & Beverage Stores	82,693,348	33,582,484	0.4

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

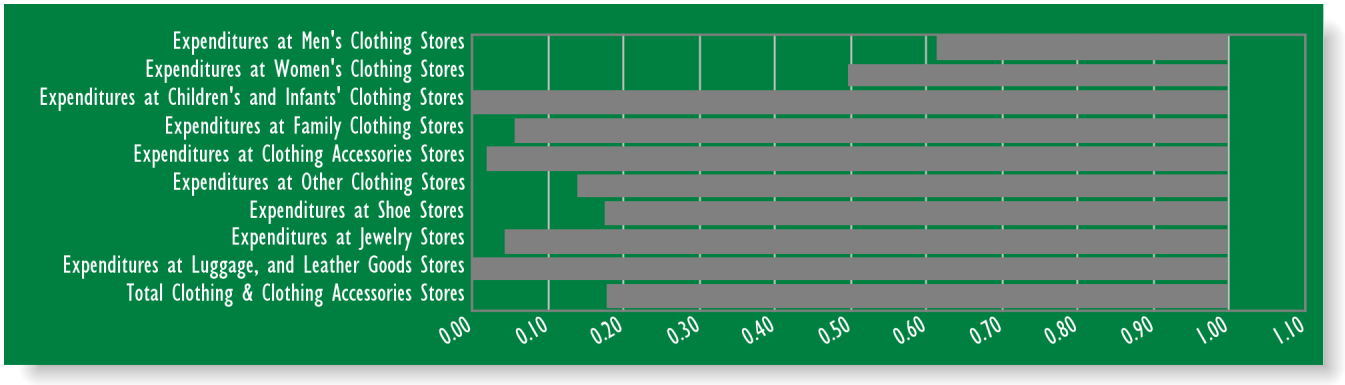
Sub-Categories of Health & Personal Care Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	28,291,074	21,317,149	0.8
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	1,090,245	0	0.0
Expenditures at Optical Goods Stores	1,581,756	260,747	0.2
Expenditures at Other Health and Personal Care Stores	1,937,669	2,284,999	1.2
Total Health & Personal Care Stores	32,900,745	23,862,895	0.7

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Clothing & Clothing Accessories Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	1,736,422	1,067,917	0.6
Expenditures at Women's Clothing Stores	6,864,316	3,415,189	0.5
Expenditures at Children's and Infants' Clothing Stores	1,443,296	0	0.0
Expenditures at Family Clothing Stores	14,380,184	817,601	0.1
Expenditures at Clothing Accessories Stores	627,446	12,609	0.0
Expenditures at Other Clothing Stores	1,733,329	244,238	0.1
Expenditures at Shoe Stores	4,803,863	843,791	0.2
Expenditures at Jewelry Stores	5,244,567	236,245	0.0
Expenditures at Luggage, and Leather Goods Stores	437,819	0	0.0
Total Clothing & Clothing Accessories Stores	37,271,242	6,637,591	0.2

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

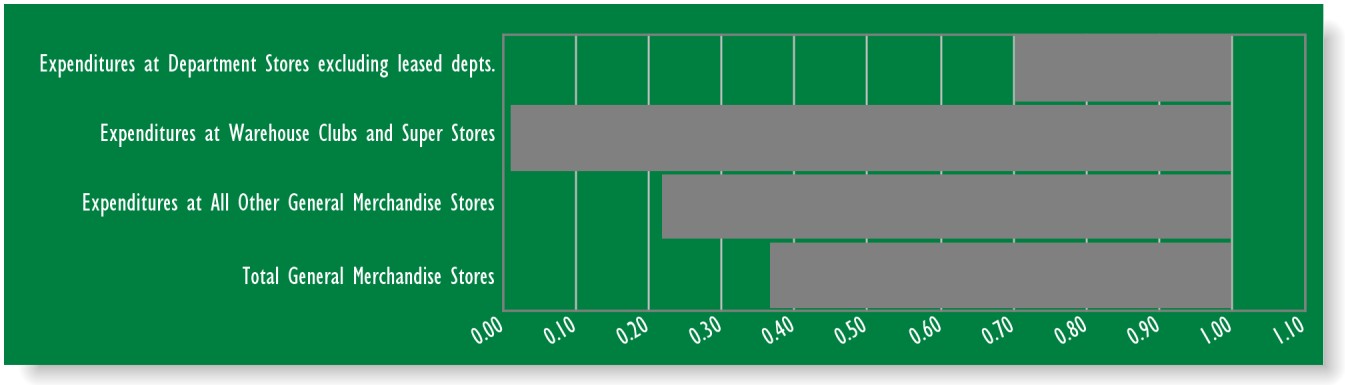
Sub-Categories of Sporting Goods, Hobby, Book, & Music Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	5,569,216	5,491,546	1.0
Expenditures at Hobby, Toys and Games Stores	3,314,160	1,304,947	0.4
Expenditures at Sew/Needlework/Piece Goods Stores	749,262	889,467	1.2
Expenditures at Musical Instrument and Supplies Stores	947,358	342,258	0.4
Expenditures at Book Stores and News Dealers	2,922,860	356,402	0.1
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	1,407,051	112,217	0.1
Total Sporting Goods, Hobby, Book, & Music Stores	14,909,907	8,496,836	0.6

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

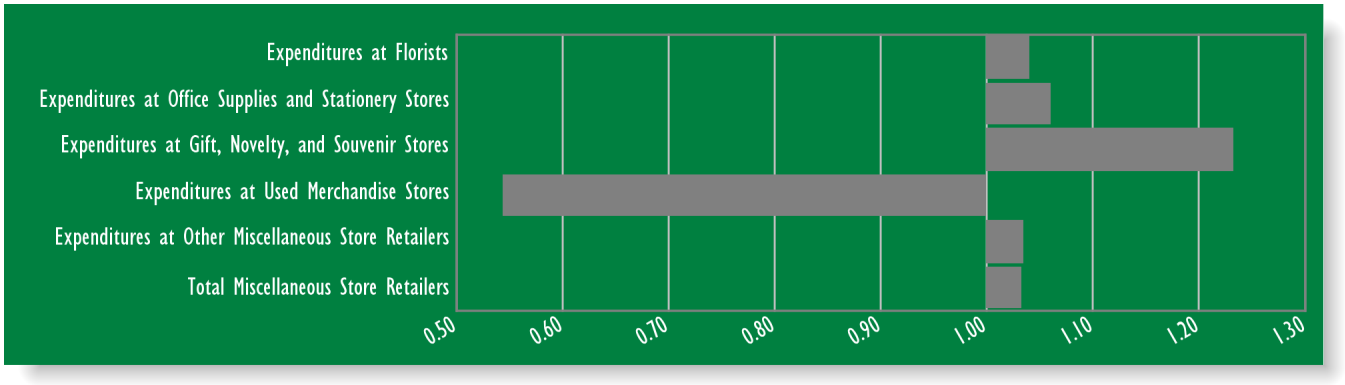
Sub-Categories of General Merchandise Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	44,271,577	31,197,433	0.7
Expenditures at Warehouse Clubs and Super Stores	39,204,104	436,278	0.0
Expenditures at All Other General Merchandise Stores	6,889,865	1,496,860	0.2
Total General Merchandise Stores	90,365,546	33,130,570	0.4

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

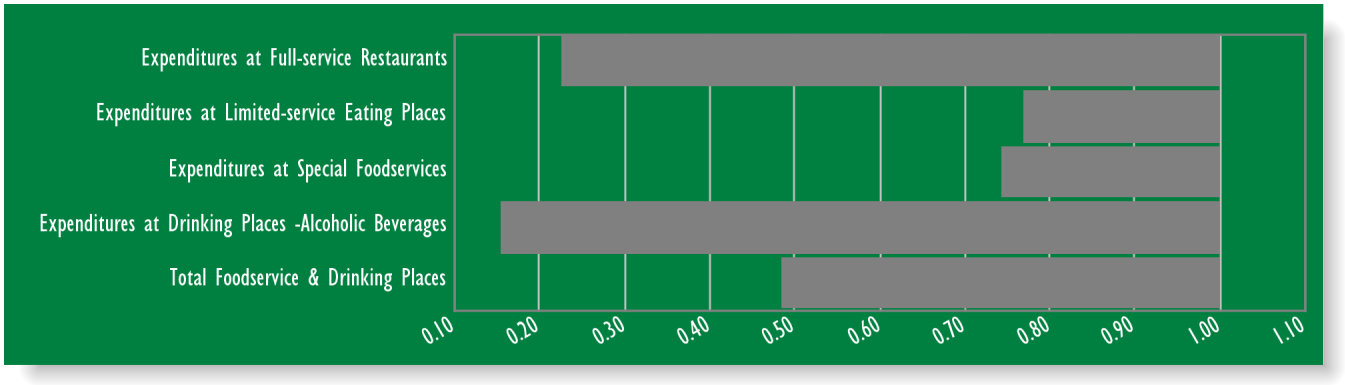
Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	1,470,743	1,530,956	1.0
Expenditures at Office Supplies and Stationery Stores	4,529,564	4,806,945	1.1
Expenditures at Gift, Novelty, and Souvenir Stores	3,491,790	4,309,653	1.2
Expenditures at Used Merchandise Stores	1,717,028	933,518	0.5
Expenditures at Other Miscellaneous Store Retailers	8,708,474	9,018,875	1.0
Total Miscellaneous Store Retailers	19,917,598	20,599,947	1.0

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	31,323,828	7,123,431	0.2
Expenditures at Limited-service Eating Places	27,507,668	21,169,395	0.8
Expenditures at Special Foodservices	5,676,962	4,229,978	0.7
Expenditures at Drinking Places -Alcoholic Beverages	3,431,581	533,710	0.2
Total Foodservice & Drinking Places	67,940,038	33,056,514	0.5

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sources and Methodology

The primary data sources used in the construction of the database include:

- Current year AGS (Applied Geographic Solutions) Consumer Expenditure Estimates
- Census of Retail Trade, Merchandise Line Sales
- Census Bureau Monthly Retail Trade

The Census of Retail Trade presents a table known as the Merchandise Line summary, which relates approximately 120 merchandise lines (e.g. hardware) to each of the store types. For each merchandise line, the distribution of sales by store type can be computed, yielding a conversion table which apportions merchandise line sales by store type.

The AGS (Applied Geographic Solutions) Consumer Expenditure database was re-computed to these merchandise lines by aggregating both whole and partial categories, yielding, at the block group level, a series of merchandise line estimates which are consistent with the AGS Consumer Expenditure database.

These two components were then combined in order to derive estimated potential by store type. The results were then compared to current retail trade statistics to ensure consistency and completeness.

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

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Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

-Indicating how well the retail needs of local residents are being met
-Uncovering unmet demand and possible opportunities
-Understanding the strengths and weaknesses of the local retail sector
-Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

Interpreting Leakage Index

1.0 = equilibrium, meaning that demand and sales in the area being analyzed are in balance.

.80 = demand exceeds sales by 20%, meaning that consumers are leaving the area being analyzed.

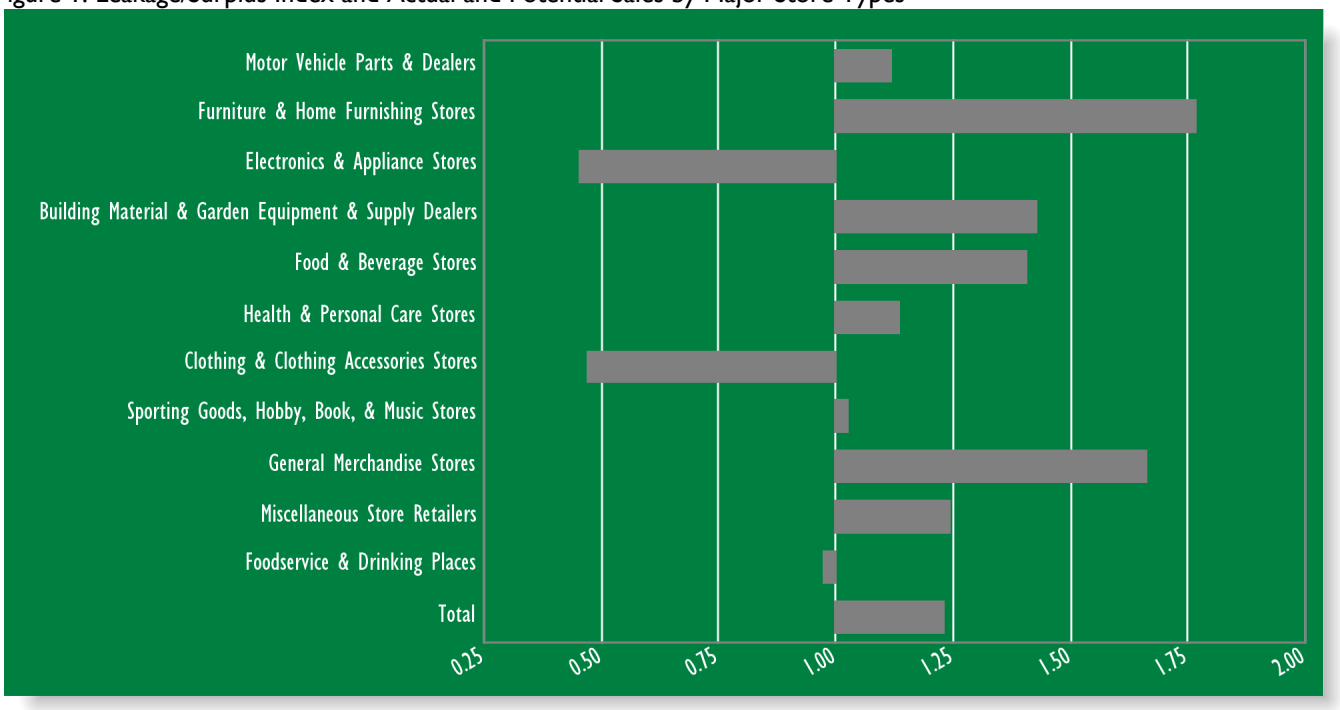
1.2 = sales exceed demand by 20%, meaning that consumers are coming from outside the area being analyzed.

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 1 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 1. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	228,607,369	255,401,791	1.1
Furniture & Home Furnishing Stores	29,917,339	52,836,985	1.8
Electronics & Appliance Stores	27,318,974	12,428,000	0.5
Building Material & Garden Equipment & Supply Dealers	137,590,373	196,251,012	1.4
Food & Beverage Stores	129,231,986	181,774,978	1.4
Health & Personal Care Stores	52,303,345	59,263,828	1.1
Clothing & Clothing Accessories Stores	54,744,508	25,847,066	0.5
Sporting Goods, Hobby, Book, & Music Stores	22,392,967	22,951,557	1.0
General Merchandise Stores	137,040,628	227,713,487	1.7
Miscellaneous Store Retailers	30,260,211	37,626,745	1.2
Foodservice & Drinking Places	105,819,751	103,081,917	1.0
Total	955,227,451	1,175,177,367	1.2

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

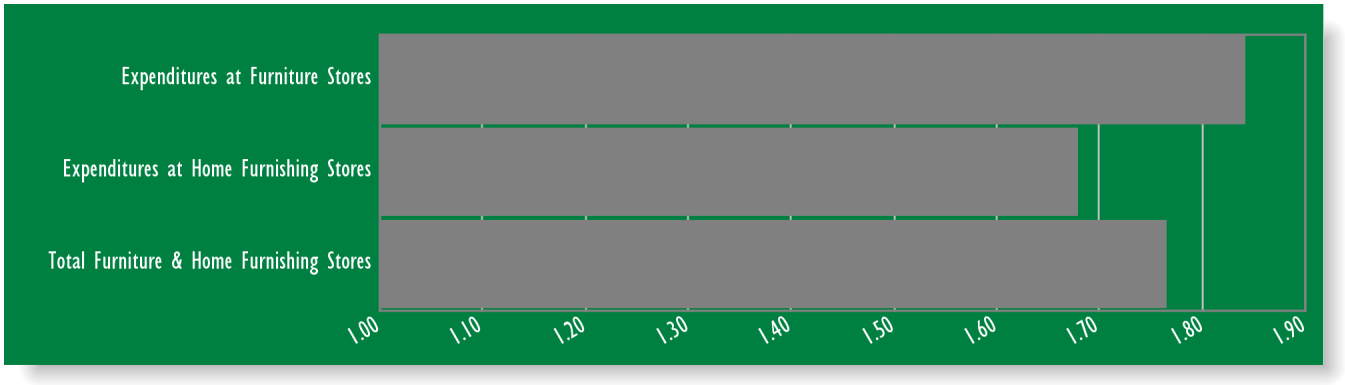
Sub-Categories of Motor Vehicle Parts & Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	197,332,251	192,708,424	1.0
Expenditures at Other Motor Vehicle Dealers	14,293,971	42,931,727	3.0
Expenditures at Automotive Parts, Accessories, and Tire Stores	16,981,148	19,761,640	1.2
Total Motor Vehicle Parts & Dealers	228,607,369	255,401,791	1.1

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

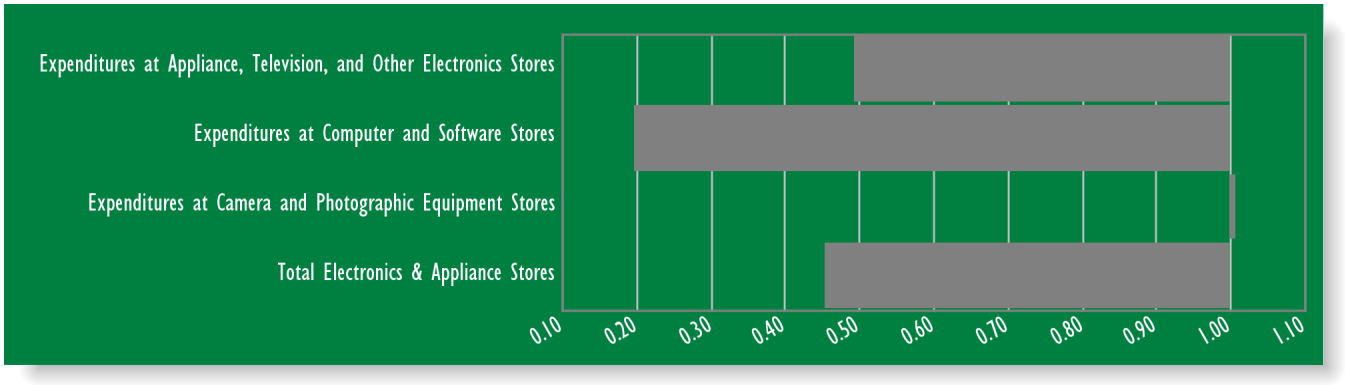
Sub-Categories of Furniture & Home Furnishing Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	15,916,445	29,317,089	1.8
Expenditures at Home Furnishing Stores	14,000,894	23,519,896	1.7
Total Furniture & Home Furnishing Stores	29,917,339	52,836,985	1.8

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Electronics & Appliance Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	20,578,398	10,174,308	0.5
Expenditures at Computer and Software Stores	5,609,549	1,115,201	0.2
Expenditures at Camera and Photographic Equipment Stores	1,131,027	1,138,492	1.0
Total Electronics & Appliance Stores	27,318,974	12,428,000	0.5

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

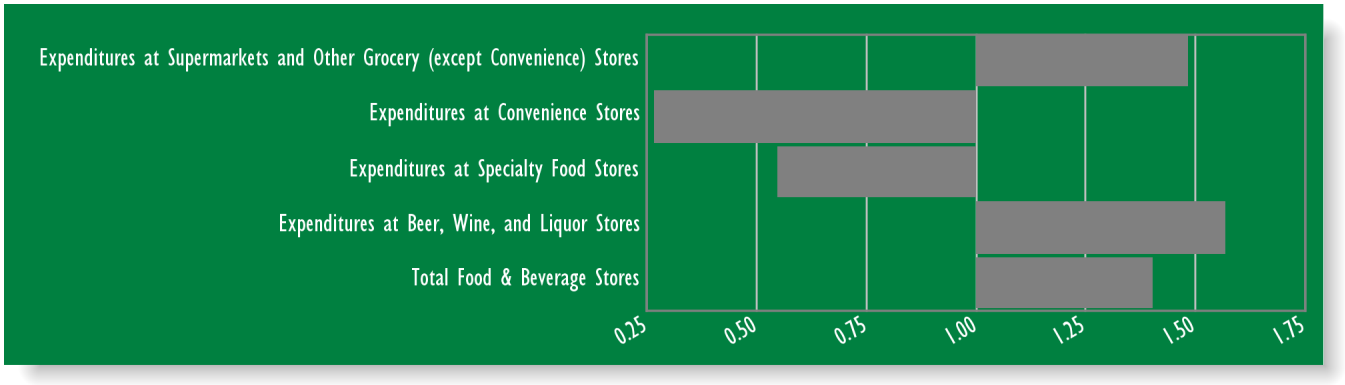
Sub-Categories of Building Material & Garden Equipment & Supply Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	50,224,216	128,857,531	2.6
Expenditures at Paint and Wallpaper Stores	2,772,665	4,761,072	1.7
Expenditures at Hardware Stores	10,221,953	18,180,226	1.8
Expenditures at Other Building Materials Dealers	63,288,603	40,951,888	0.6
Expenditures at Outdoor Power Equipment Stores	1,622,473	1,240,137	0.8
Expenditures at Nursery and Garden Centers	9,460,463	2,260,158	0.2
Total Building Material & Garden Equipment & Supply Dealers	137,590,373	196,251,012	1.4

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

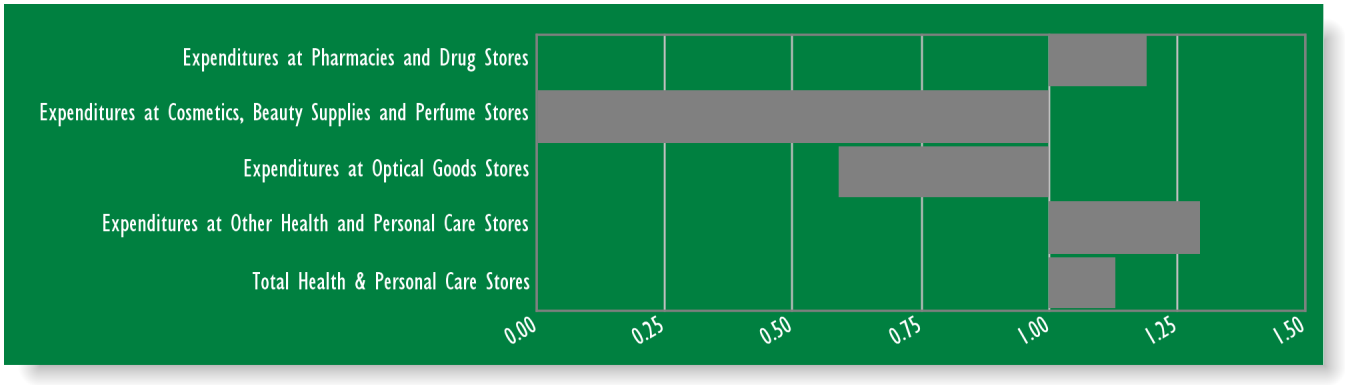
Sub-Categories of Food & Beverage Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	110,821,801	164,646,839	1.5
Expenditures at Convenience Stores	6,278,217	1,695,858	0.3
Expenditures at Specialty Food Stores	3,551,918	1,960,832	0.6
Expenditures at Beer, Wine, and Liquor Stores	8,580,049	13,471,449	1.6
Total Food & Beverage Stores	129,231,986	181,774,978	1.4

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

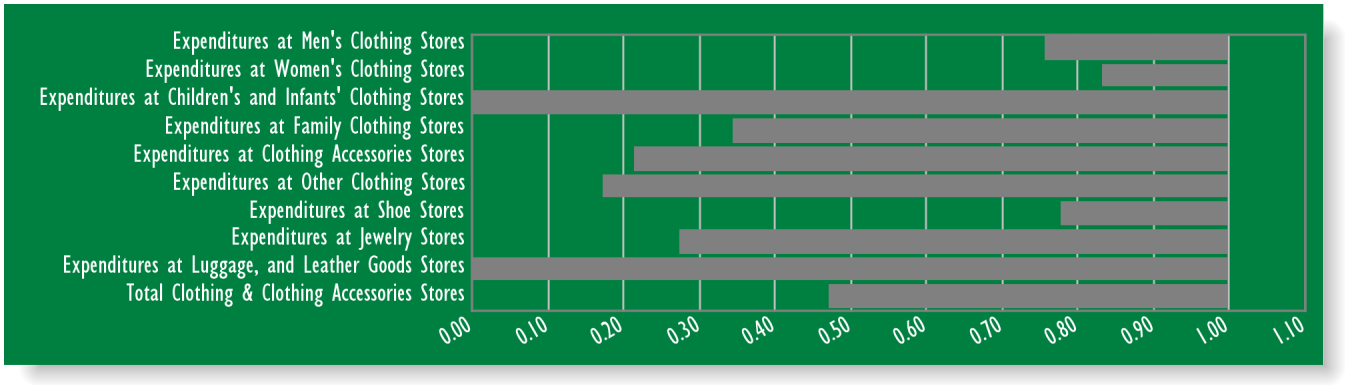
Sub-Categories of Health & Personal Care Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	45,052,907	53,816,966	1.2
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	1,743,517	5,434	0.0
Expenditures at Optical Goods Stores	2,403,744	1,421,870	0.6
Expenditures at Other Health and Personal Care Stores	3,103,177	4,019,558	1.3
Total Health & Personal Care Stores	52,303,345	59,263,828	1.1

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Clothing & Clothing Accessories Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	2,565,104	1,942,868	0.8
Expenditures at Women's Clothing Stores	9,993,395	8,331,835	0.8
Expenditures at Children's and Infants' Clothing Stores	2,208,647	0	0.0
Expenditures at Family Clothing Stores	21,224,352	7,313,832	0.3
Expenditures at Clothing Accessories Stores	909,054	195,190	0.2
Expenditures at Other Clothing Stores	2,539,496	438,828	0.2
Expenditures at Shoe Stores	7,139,416	5,557,368	0.8
Expenditures at Jewelry Stores	7,531,156	2,067,145	0.3
Expenditures at Luggage, and Leather Goods Stores	633,889	0	0.0
Total Clothing & Clothing Accessories Stores	54,744,508	25,847,066	0.5

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

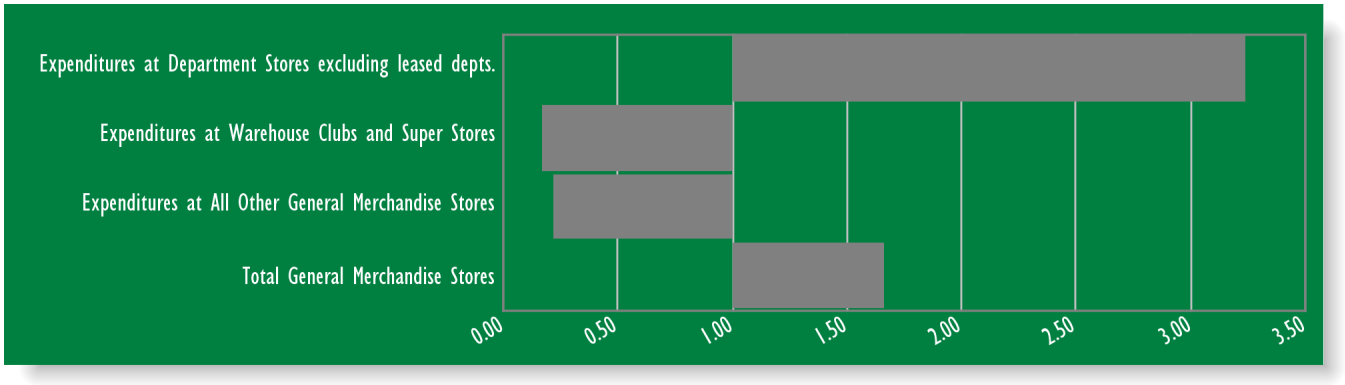
Sub-Categories of Sporting Goods, Hobby, Book, & Music Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	8,214,638	9,525,227	1.2
Expenditures at Hobby, Toys and Games Stores	4,979,785	6,062,766	1.2
Expenditures at Sew/Needlework/Piece Goods Stores	1,121,349	1,241,456	1.1
Expenditures at Musical Instrument and Supplies Stores	1,433,780	936,900	0.7
Expenditures at Book Stores and News Dealers	4,457,297	4,389,770	1.0
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	2,186,118	795,438	0.4
Total Sporting Goods, Hobby, Book, & Music Stores	22,392,967	22,951,557	1.0

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

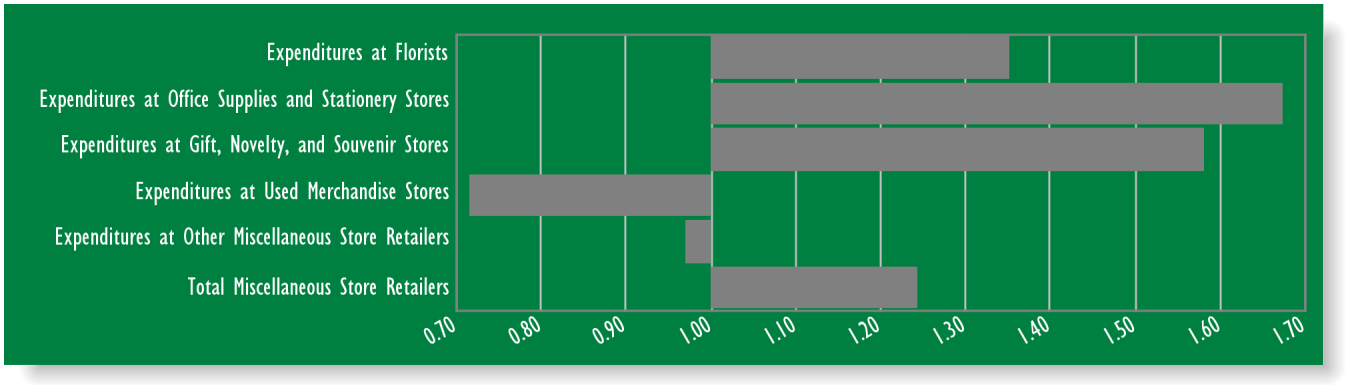
Sub-Categories of General Merchandise Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	66,378,948	215,263,870	3.2
Expenditures at Warehouse Clubs and Super Stores	60,296,373	10,131,549	0.2
Expenditures at All Other General Merchandise Stores	10,365,307	2,318,068	0.2
Total General Merchandise Stores	137,040,628	227,713,487	1.7

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

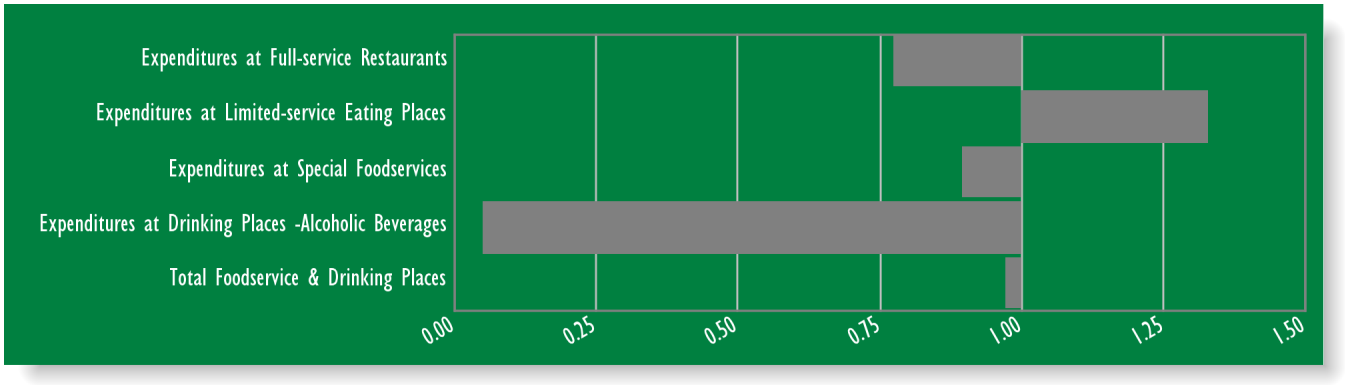
Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	2,176,533	2,945,361	1.4
Expenditures at Office Supplies and Stationery Stores	6,884,444	11,520,674	1.7
Expenditures at Gift, Novelty, and Souvenir Stores	5,295,338	8,378,151	1.6
Expenditures at Used Merchandise Stores	2,569,005	1,841,074	0.7
Expenditures at Other Miscellaneous Store Retailers	13,334,891	12,941,484	1.0
Total Miscellaneous Store Retailers	30,260,211	37,626,745	1.2

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	48,803,164	37,916,346	0.8
Expenditures at Limited-service Eating Places	42,820,669	56,954,853	1.3
Expenditures at Special Foodservices	8,827,746	7,926,997	0.9
Expenditures at Drinking Places -Alcoholic Beverages	5,368,172	283,721	0.1
Total Foodservice & Drinking Places	105,819,751	103,081,917	1.0

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sources and Methodology

The primary data sources used in the construction of the database include:

- Current year AGS (Applied Geographic Solutions) Consumer Expenditure Estimates
- Census of Retail Trade, Merchandise Line Sales
- Census Bureau Monthly Retail Trade

The Census of Retail Trade presents a table known as the Merchandise Line summary, which relates approximately 120 merchandise lines (e.g. hardware) to each of the store types. For each merchandise line, the distribution of sales by store type can be computed, yielding a conversion table which apportions merchandise line sales by store type.

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Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Appendix B:

Segmentation Guide

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Group Structure

Segment Group	Label	Segment Name	% of US Households	Page #
A Affluent Suburbia 11.19%	A01	America's Wealthiest	1.14%	6
	A02	Dream Weavers	1.74%	7
	A03	White-collar Suburbia	1.43%	8
	A04	Upscale Suburbanites	0.84%	9
	A05	Enterprising Couples	0.84%	10
	A06	Small-town Success	2.38%	11
	A07	New Suburbia Families	2.82%	12
B Upscale America 13.26%	B01	Status-conscious Consumers	1.55%	13
	B02	Affluent Urban Professionals	1.44%	14
	B03	Urban Commuter Families	6.33%	15
	B04	Solid Suburban Life	0.63%	16
	B05	Second-generation Success	2.40%	17
	B06	Successful Suburbia	0.91%	18
C Small-town Contentment 7.64%	C01	Second City Homebodies	0.74%	19
	C02	Prime Middle America	3.52%	20
	C03	Suburban Optimists	0.61%	21
	C04	Family Convenience	1.93%	22
	C05	Mid-market Enterprise	0.84%	23
D Blue-collar Backbone 6.57%	D01	Nuevo Hispanic Families	2.73%	24
	D02	Working Rural Communities	1.06%	25
	D03	Lower-income Essentials	0.83%	26
	D04	Small-city Endeavors	1.95%	27
E American Diversity 9.73%	E01	Ethnic Urban Mix	1.89%	28
	E02	Urban Blues	1.74%	29
	E03	Professional Urbanites	2.09%	30
	E04	Suburban Advantage	1.15%	31
	E05	American Great Outdoors	1.37%	32
	E06	Mature America	1.48%	33
F Metro Fringe 10.63%	F01	Steadfast Conservatives	6.51%	34
	F02	Moderate Conventionalists	1.60%	35
	F03	Southern Blues	0.92%	36
	F04	Urban Grit	0.55%	37
	F05	Grass-roots Living	1.05%	38
G Remote America 7.39%	G01	Hardy Rural Families	2.70%	39
	G02	Rural Southern Living	2.71%	40
	G03	Coal and Crops	1.81%	41
	G04	Native Americana	0.18%	42
H Aspiring Contemporaries 11.18%	H01	Young Cosmopolitans	3.22%	43
	H02	Minority Metro Communities	2.20%	44
	H03	Stable Careers	4.29%	45
	H04	Aspiring Hispania	1.48%	46
I Rural Villages and Farms 4.77%	I01	Industrious Country Living	1.30%	47
	I02	America's Farmlands	1.04%	48
	I03	Comfy Country Living	0.73%	49
	I04	Small-town Connections	0.48%	50
	I05	Hinterland Families	1.23%	51
J Struggling Societies 8.20%	J01	Rugged Rural Style	1.62%	52
	J02	Latino Nuevo	2.91%	53
	J03	Struggling City Centers	1.72%	54
	J04	College Town Communities	0.98%	55
	J05	Metro Beginnings	0.98%	56
K Urban Essence 8.63%	K01	Unattached Multi-cultures	0.38%	57
	K02	Academic Influences	0.47%	58
	K03	African-American Neighborhoods	1.93%	59
	K04	Urban Diversity	2.44%	60
	K05	New Generation Activists	2.37%	61
	K06	Getting By	1.05%	62
L Varying Lifestyles 0.80%	L01	Military Family Life	0.31%	63
	L02	Major University Towns	0.27%	64
	L03	Gray Perspectives	0.22%	65

Mosaic USA Group Descriptions

A full Mosaic media guide is available online at: www.buxtonco.com/mosaic.asp

Group **A: Affluent Suburbia**

The wealthiest households in the U.S. living in exclusive suburban neighborhoods enjoying the best of everything that life has to offer

The seven Segments in the Affluent Suburbia group comprise the wealthiest households in the nation. These segments outrank all other Mosaic Segments in terms of household income, home value and educational achievement. Concentrated in exclusive suburban neighborhoods, these households are predominantly white, college educated and filled with Baby Boom parents and their children. With their managerial and executive positions paying six-figure-plus incomes, they enjoy the good life in fashionable houses outfitted with the latest technology. These are the Americans who drive luxury cars, belong to country clubs, travel abroad and relax by sailing, golfing or skiing. Many are culture buffs who attend the theater, art shows, dance performances and concerts, all at high rates. Both their purchasing behavior and media choices reflect their interests in money management, travel, computers and gourmet foods.

Group **B: Upscale America**

College-educated couples and families living in the metropolitan sprawl earning upscale incomes providing them with large homes and very comfortable and active lifestyles

The six Segments in Upscale America are populated with mainly white, college-educated couples and families living in the metropolitan sprawl. Most of the adults work as executives and white-collar professionals, and their upscale incomes provide them with large homes and comfortable lifestyles. They like to spend their leisure time getting exercise—jogging, biking and swimming are popular—or shopping for the latest in-fashion and high-tech electronics. They are active in community affairs as members of business clubs, environmental groups and arts associations. They're selective media fans who prefer magazines and cable TV channels that cover business, fashion and the arts. Their one exception is the Internet. These Americans are omnivorous Web users who go online for everything from banking and trading stocks to downloading music and buying merchandise.

Group **C: Small-town Contentment**

Middle-aged, upper-middle-class families living in small towns and satellite cities with moderate educations employed in white-collar, blue-collar and service professions

The five Segments in Small-town Contentment represent the nation's middle-aged, upper-middle-class families living in small towns and satellite cities. As a group, they share moderate educations and a mix of well-paying jobs in white-collar, blue-collar and service professions. With their locations outside the nation's major metros, these households can afford recently built homes and new SUVs and pickup trucks. They enjoy outdoor sports like hiking, fishing and camping. They are also close enough to big cities to frequent comedy clubs, nightclubs and upscale malls for designer clothes and sporting goods. They tend to have varied media tastes, enjoying music and comedy shows on television, modern rock and country music on the radio and fitness and music magazines from newsstands. They are active Internet users going online for instant messaging, exchanging email and getting the latest sports scores and news.

Group **D: Blue-collar Backbone**

Budget-conscious, young and old blue-collar households living in older towns working in manufacturing, construction and retail trades

The four Segments in Blue-collar Backbone are a bastion of blue-collar diversity. This group features above-average proportions of both old and young residents, whites and Hispanics, families and singles, homeowners and apartment renters. Most residents live in older outlying towns and cities, and work at blue-collar jobs in manufacturing, construction and retail trades. Their lifestyle reflects a working-class sensibility. Their most popular leisure activities include baseball, soccer, fishing and woodworking. They're more likely to go out to a veterans club than attend a concert or play. These budget-conscious households shop at discount clothiers and department stores, and they have low rates for buying investments or insurance products. With relatively few entertainment options due to their remote location or lack of discretionary income, this group is a strong market for traditional media. Residents like to watch soaps and game shows on television, listen to country music on the radio and read a variety of outdoor and women's magazines.

Group **E: American Diversity**

A diverse group of ethnically mixed singles and couples, middle-aged and retired with middleclass incomes from blue-collar and service industry jobs

American Diversity is a reflection of how contrasting mid-America's population is. It is an ethnic mix of middleaged couples, singles and retirees. With a few exceptions, these six Mosaic Segments consist of households with average educations and middle-class incomes from blue-collar and service industry jobs. Many of the group's adults are older Americans—aging singles and couples who've already exited the workplace. They tend to have unassuming lifestyles, scoring high for reading books and newspapers, going to movies and plays, and socializing through fraternal orders and veterans clubs. They have traditional media tastes, enjoying TV news, movies and game shows as well as business and shelter magazines. Conservative in their politics and fashion, they have limited interest in new clothing styles, consumer electronics or the Internet.

Group **F: Metro Fringe**

Racially mixed, lower-middle-class clusters in older single-family homes, semi-detached houses and low-rise apartments in satellite cities

Metro Fringe is a collection of five racially mixed, lower-middle-class Mosaic Segments located primarily in satellite cities such as Kissimmee, FL, Flint MI, Joiliet, IL and Fresno, CA. Many of the group's households consist of young singles and couples who work at blue-collar and service industry jobs. They tend to live in older singlefamily homes, semidetached houses and low-rise apartments. Overall, this group is relatively active and pursues sports-oriented lifestyles participating in activities such as soccer and softball, rollerblading, skateboarding, gocarting and video gaming. As shoppers, they patronize discount retailers where they buy the latest fashion and tech gear at low prices. In their homes, they're fans of electronic media, whether it's watching youth-oriented cable channels like Spike TV, FX and Cartoon Network, or going online to chat forums and Web sites for job listings or music downloading.

Group **G: Remote America**

A mix of farming and small industrial rural communities with outdoor oriented lifestyles living primarily in America's heartland

The four Remote America Segments reflect heartland lifestyles, a mix of farming and small industrial communities mostly located in the nation's midsection. The working-class couples and families in this group tend to be employed in agriculture and blue-collar jobs that pay modest wages. The median home value is about half the national average, and a significant number of residents live in mobile homes. No group has a lower population density, and few have higher rates for outdoors-oriented lifestyles. Households spend their leisure time fishing, hunting, hiking and horseback riding. In their homes, they look to their TV sets for entertainment, especially game shows, soap operas and home improvement shows. Their magazine tastes may split along gender lines with the men reading hunting publications while the women peruse shelter magazines. On the radio, country and western is the preferred choice of music.

Group **H: Aspiring Contemporaries**

Young, mostly single, ethnically diverse, online active households living in new homes or apartments with discretionary income to spend on themselves

The four Segments in Aspiring Contemporaries are all filled with upward strivers. The households tend to be young (Generation Xers between 18 and 34 years old), ethnically diverse (about 40 percent are minorities) and unattached (about two-thirds are single or divorced). Yet despite traditional barriers to affluence, the members of these metropolitan segments are already solidly middle-class. Many live in relatively new homes or apartments valued at more than the national average—a reliable sign of upward mobility. They're big culture buffs who like to see plays, movies, comics and live bands. They spend a lot of their discretionary income on the latest fashions and consumer electronics. They're heavy media consumers, listening to jazz on the radio and reading the Sunday paper for science and technology news. Raised on technology, they are very Internet savvy, spending their leisure time online to chat, shop, job search, send instant messages, bid in auctions and frequent dating Web sites.

Group **I: Rural Villages and Farms**

Rural, middle-class married families and couples of varied ages, living and working in agricultural and mining communities

Representing America's agricultural and mining communities, Rural Villages and Farms is a collection of five low-density Segments filled with middle-class families and couples of varied ages. Most of the households in this group are married, white and high school educated. They maintain tranquil lifestyles in unpretentious houses and comfortable mobile homes. They share a fondness for outdoor sports, enjoying fishing, hunting, camping and motor sports. Many residents are do-it-yourselfers who are into woodworking and needlework. They like to shop at the big-box home improvement chains and watch how-to shows on TV. When it comes to media, nothing dominates like country music. They watch their favorite country and western stars on TV, listen to them on the radio and attend their concerts.

Group **J: Struggling Societies**

Young minorities, students and single parents trying to raise families on low-level jobs in manufacturing, health care and food services

The five Segments in Struggling Societies symbolize the challenges facing a significant number of economically challenged Americans. These households tend to be disadvantaged and uneducated. With incomes half the national average and nearly a third never completing high school, they are consigned to low-level jobs in manufacturing, health care and food services. Many of these residents are young, minorities, students and single parents trying to raise families on low incomes and tight budgets. Without much discretionary income their activities are limited and leisure pursuits include playing sports like basketball, volleyball and skateboarding. They shop at discount clothiers and sporting goods stores for casual apparel and athletic shoes. In these lessfortunate communities, television is a main source of entertainment, specifically reality programs, sitcoms, talk shows and sports. This group also relates to ethnic-oriented media, creating a strong radio market for stations that play Spanish, Mexican and urban contemporary music.

Group **K: Urban Essence**

Young, single and single-parent minorities living in older apartments working at entry-level jobs in service industries

As a whole, the six segments in Urban Essence make up the nation's least affluent group, a collection of relatively young minorities living in older apartments. More than half the households consist of African Americans and Hispanics. Many of these residents are single or single parents working at entry-level jobs in service industries. With their low education levels and household incomes, residents lead unpretentious lifestyles. Many spend their leisure time playing sports like baseball, basketball and football. With their above-average household size, they make a strong market for children's toys and electronic gear, especially video games, dolls and board games. They have high rates for enjoying traditional media, reading ethnic-targeted magazines, listening to jazz and urban contemporary radio and, especially, watching television. It's hard to find a network program or cable channel that they don't view watching comedies, cartoons, sports, soaps and game shows.

Group **L: Varying Lifestyles**

Residents who primarily live in group quarters including students, military personnel and institution populations

The three Segments that make up Varying Lifestyles are an unconventional group. What they share is the singular experience of living in group quarters. A majority of this group lives the unique lifestyles offered by the military and university dorm life. Though their daily lives are different from many Americans—as well as each other—those who have the ability are more likely than average Americans to visit museums, zoos and state fairs. They like to stay active doing aerobic exercise, hiking, bowling and playing sports like tennis, baseball and volleyball. They're frequent travelers who vacation abroad as well as within the United States. At home, they divide their time between the television and computer screens. They typically watch TV news, comedy programs and latenight talk shows. When online they frequent chat rooms, auction and banking sites and listen to Internet radio with a preference for rock 'n' roll.

Mosaic USA Segment Descriptions

Group A: Affluent Suburbia

Segment A06: Small-town Success

White-collar, college educated, middle-aged working couples living in newly developed subdivisions outside the nation's beltways

Demographics

Small-town Success is typically home to the families of the most prominent citizens in their exurban communities. White-collar, college educated and upscale, they live in recently developed subdivisions outside the nation's beltways in the Midwest and West. Most of these households contain white, middle-aged working couples who have positions as executives and professionals in health care, retail and education. More than eight in ten drive alone to work, pulling out of the driveways of large single-family homes valued at 50 percent above the national median. These high-earners drive to work in comfort and have high rates for owning luxury SUVs as well as family vehicles including minivans.

Lifestyles

Small-town Success households enjoy a prosperous way of life. For athletic activities, they enjoy biking, swimming, bowling and jogging. They tend to seek out intellectual stimulation, reading books and taking adult education classes at high rates, and they don't mind driving to big cities to visit museums or see a show. They're conservative by nature and describe themselves as "smart shoppers." They like to buy quality merchandise at low prices at big-box chains such as Sam's Club, Circuit City and Bed, Bath & Beyond. They're late adopters when it comes to consumer electronics and are more likely to own 35-mm cameras than digital models, VHS players than DVD units. They own a wide range of insurance products, including life, health, disability and homeowner's coverage. However, being conservative hasn't dampened their enthusiasm for travel as they are likely to take a trip for either business or pleasure almost every month of the year.

Media

Small-town Success households share a fondness for a variety of media. They like to watch primetime crime dramas and comedies on television, especially "CSI," "Law and Order" and "Two and a Half Men." They are avid radio listeners and enjoy stations that offer news talk, golden oldies and country music. They have high rates for reading the Sunday newspaper to catch up on sports, business and entertainment news and read mainstream magazine titles as National Geographic, Good Housekeeping and Better Homes and Gardens. They have above average interest in the Internet, and they go online to get news, do their banking and buy merchandise such as books and CDs.

Group A: Affluent Suburbia

Segment A07: New Suburbia Families

Young, affluent working couples with pre-school children concentrated in fast-growing, metro fringe communities

Demographics

Young couples with pre-school children have turned New Suburbia Families into a booming lifestyle. Concentrated in fast-growing, metro fringe communities mainly in the West and Southwest, the segment's population has more than tripled since 1990. With many households under 35 years old, these young families are making the most of their new subdivisions. More than half the housing has been built since 2000 and the median value worth nearly 50 percent above the U.S. average. Residents have both brains and bucks. More than twothirds have gone to college and many workers earn six-figure incomes. It takes hard work to have achieved success at such a young age. More than two-thirds of families have multiple workers in the labor force, gravitating to jobs as managers, executives and white-collar professionals.

Lifestyles

The members of New Suburbia Families have crafted active, children-centered lifestyles. These families participate in a number of team sports such as baseball, basketball and soccer, shuttling kids and gear to activities in their SUVs and minivans. They go to kid-friendly destinations and frequent zoos, aquariums and campgrounds. At supermarkets, they fill their grocery carts with pizza, Pop Tarts and prepared lunch kits. This is one of the top-ranked segments for owning toys, books and video games, and residents here never met a consumer electronics device they didn't like including cell phones, gaming systems and home theater systems. With their relatively large families, money still needs to be managed. They maintain that price and functionality trump style when they purchase electronics and clothing at retailers like Target, Best Buy and Wal-Mart. Contributing to 529 college savings plans is a priority, but this segment can be debt heavy due to first mortgages and home equity loans.

Media

These energetic households are only moderate consumers of most media. New Suburbia Families are often too busy to read a newspaper or magazine, although they will sit in front of a TV to watch network sitcoms and reality shows as well as sports and entertainment on cable channels such as ESPN, MTV and Comedy Central. Thanks to their lengthy commutes, they exhibit high rates for listening to radio stations that offer news and sports as well as classic rock and adult contemporary music. When they finally wind down, many go online to trade stocks, search for jobs and check out real estate listings.

Group B: Upscale America

Segment B03: Urban Commuter Families

Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe

Demographics

Not all families have fled the nation's cities for the far-out suburbs. In Urban Commuter Families, Baby Boomer families and couples are content to live in comfortable, single detached homes in city neighborhoods on the metro fringe. Many of these upscale, college-educated households contain dual-income couples who put in long hours as professionals and managers in retail, health care and education services. They tend to leverage their home equity with major home improvement projects, and build their real estate holdings with recent purchases of second homes for family getaways.

Lifestyles

With its concentration of empty-nesters, Urban Commuter Families lifestyle is relatively serene. They are not into aerobic sports, preferring to get their exercise from low-impact activities such as gardening, golfing and birdwatching. They enjoy leisure activities like going to the theater or antique show rather than a rock concert or an auto race. They describe themselves as brand-loyal shoppers who prefer to buy functional clothes over expensive designer labels, shopping at stores like Sears and J.C. Penney. With limited interest in the latest electronics and technology products, their homes are more likely to contain stereos and 35-mm cameras than MP3 players and digital cameras. These conservative investors put their money to work in CDs, U.S. savings bonds and taxsheltered annuities. With their high rates of owning houses and vacation homes, they take out home improvement loans and spend their free time roaming the aisles at Home Depot and Lowe's, Linens 'N Things and Pottery Barn.

Media

The households in Urban Commuter Families are old-fashioned media fans. They subscribe to daily newspapers at high rates and spend their Sunday mornings poring over the travel section and the ad inserts. They pick up traditional general interest magazines at the supermarket, enjoying Reader's Digest, Family Circle and Good Housekeeping. On their commute to work, they listen to the calming strains of classical, golden oldies and big band music on the radio. When they finally wind down in front of a TV, these conservative households watch Fox News, the History Channel and the old movies on AMC and TMC. Their Mosaic motto could be "No surprises, please."

Group B: Upscale America

Segment B05: Second-generation Success

Upper-middle-class and large multi-ethnic households working in white and blue-collar jobs within metro fringe communities

Demographics

These grandchildren of immigrants who live in Second-generation Success, life is sweet. These multi-ethnic households—of Asian, Hispanic and varied European descent—have achieved upper-middle-class status through hard work and devotion to family. They are primarily married couples with children. Their household size with five or more people is almost double the U.S. average. More than half of adults have attended college, landing a mix of blue- and white-collar jobs in retail, manufacturing, transportation and public administration. In these metro fringe communities, located primarily in coastal states, many households strive to balance the need to assimilate with the desire to retain their cultural traditions. For now, most have found the American Dream in a single detached house built in the early 1980s in what was then the suburban frontier.

Lifestyles

With their upscale incomes and children of all ages, Second-generation Success households enjoy active, familycentered lifestyles. They participate in a number of team sports, including soccer, basketball, football and baseball. On weekends, they typically pile into their vans and SUVs for outings to a zoo, aquarium, cinema or one of the kids' sporting games. Those vehicles also come in handy when they go on shopping excursions patronizing big-box stores such as Home Depot, Toys R Us and Best Buy. Indeed, these relatively young families make a strong market for toys, sporting goods and high-tech products, and they say they're heavily influenced by their children when shopping. With these households, most of their savings is tied up in their home equity. At the supermarket they buy a lot of fresh fish, poultry and meat for home-cooked meals.

Media

Second-generation Success is a media-filled lifestyle where residents enjoy virtually all media channels at aboveaverage rates. They watch network television programs that feature sitcoms, sports, reality shows and even animation—the grownups watching alongside their kids. They read celebrity publications such as People and Us Weekly as well as Spanish-language newspapers and magazines Radio preferences vary but with many of the households whose families are of Hispanic origin there is a tendency for ranchero and Tejano music. When it comes to the Internet, this ethnic mix has relatively high rates for surfing the Internet to download music, get sports scores, upload family pictures and search for jobs.

Group B: Upscale America

Segment B06: Successful Suburbia

Middle-age, married couples with children who enjoy an upscale life far from the downtown hustle of city living

Demographics

The households in Successful Suburbia are located primarily in East Coast towns on the metro fringe. Predominantly white and college educated, these middle-aged couples and families have settled in upscale homes built around 1985. These homeowners earn relatively high incomes from a combination of management and professional jobs in health care, retail and manufacturing. This cluster is a haven for married couples with children who enjoy life far from the downtown hustle. They rank near the top for having multiple workers and cars to commute to jobs and entertainment.

Lifestyles

Successful Suburbia households lead busy family-oriented lifestyles. They participate in varied leisure activities, from cooking and gardening to going to aquariums, bowling alleys and theaters. Many enjoy outdoor athletic activities such as golf, soccer, baseball, football and swimming. They travel frequently for business and pleasure, though mostly to domestic beaches and ski resorts. Brand loyal shoppers, they patronize stores including Kohl's, BJ's Wholesale, Old Navy, Linens 'N Things and Best Buy. In the early childrearing phase of their lives, they buy lots of home-based consumer electronics, like desktop computers, video game systems and home theater systems, bringing everything home in their SUVs. To help finance their acquisitive nature, they carry a variety of credit cards while maintaining high levels of investments in stocks, mutual funds and U.S. savings bonds.

Media

Despite their upscale profile, the households in Successful Suburbia are a tough media sell. Other than their fondness for radio, they exhibit relatively low rates for consuming most media. They will tune in family-friendly TV sitcoms, animated shows as "The Simpsons" and cable channels including ABC Family and TBS. They subscribe to a handful of home-based magazines like Popular Mechanics, Cooking Light, American Baby and Parents. On the radio, they prefer listening to country, classic rock and golden oldies. These middle-aged family households have begun to rely on the Internet for sports news, auctions and medical information. Marketers however should be warned. These busy consumers have little patience for advertising and declare that television commercials are annoying.

Group C: Small-town Contentment

Segment C02: Prime Middle America

A mix of young, upper-middle-class couples and families living in both small towns and midsized cities working in well paying white-collar and blue-collar jobs

Demographics

Prime Middle America features a mix of couples and families living in both small towns and mid-sized cities in the South and Northwest. Younger than average and upper-middle-class in status, these predominantly white dual-income households have well-paying blue-collar and white-collar jobs in transportation, manufacturing and public administration. Most of the households own their own homes and are nearly twice as likely to live in mobile homes than the national average.

Lifestyles

Prime Middle America features a small-town, family-centered lifestyle. Households enjoy leisure activities like playing cards and board games as well as outdoor pursuits such as fishing, biking and swimming at a lake. Many are do-it-yourselfers who load up their SUVs and pickup trucks with home improvement supplies from stores such as Lowe's, Home Depot and True Value Hardware. Their incomes afford them a wide range of mortgages, home equity loans and college savings plans. As consumers, they describe themselves as less interested in new fashions than the latest high-tech gadgets.

Media

When the folks in this cluster put down their hammers and saws, they enjoy a variety of media. Prime Middle America residents like to gather round their large-screen TVs to watch reality shows, sports and cable channels such as MTV, FX, Discovery and Country Music Television. They're traditionalists who enjoy reading established magazines such as Woman's World, Field & Stream and Parents. The radio soundtrack usually playing features a mix of country music, classic rock and contemporary hits. The Internet has expanded the entertainment and convenience choices for residents of small towns, and Prime Middle America households are no exception. They like to go online to play games, do their banking and participate in auctions for antiques and collectibles.

Group C: Small-town Contentment

Segment C04: Family Convenience

Sprawling families living in remote towns and military bases containing dual-income couples working at skilled blue-collar jobs in manufacturing and construction as well as in the military

Demographics

Family Convenience is a collection of sprawling families living in remote towns and military bases primarily in the Midwest and Northern Plains. Most of the households contain dual-income couples working at skilled bluecollar jobs in manufacturing and construction as well as in the military. Service families are six times as likely to live here than the general population. Despite moderate educations, the adults in this segment earn upper-middleclass incomes and have a high rate of home ownership. The vast majority own new single-family homes and have SUVs and pickup trucks in the driveway. With an above-average length of residence, many have achieved a secure lifestyle with room for the kids to grow.

Lifestyles

Life today in Family Convenience looks a lot like it did a half-century ago. Residents enjoy spending their leisure time swimming, fishing, hunting and camping. They are active in their community and belong to civic clubs and parent/teacher associations. To feed their big families, they spend their grocery money on easy-to-prepare foods like toaster pastries, lunch kits, frozen pizza and refrigerated biscuits. Discount department stores like Wal-Mart, Sam's Club and Big Lots are frequent destinations for clothing and housewares. When they take a vacation, parents are content to pile the kids into their domestic SUVs and head to a theme park or campground near a lake or beach. Financially risk-averse, they make a stronger market for insurance rather than investment products.

Media

The members of Family Convenience have traditional media tastes. They like to watch classic sitcoms on TV Land, family-friendly fare on the Disney Channel and cartoons on Nickelodeon. Many listen to radio every day, tuning in country, classic rock and adult contemporary stations. They prefer magazines that cater to their interests in the home, hunting, motor sports and entertainment. When they go online, they seek out websites that follow their leisure interests frequenting sites such as NASCAR.com, Disney.com and eBay.com all at high rates. Although their small towns may have few movie theaters, residents are avid movie goers with their favorite genre being family movies which is not surprising for this Mosaic.

Group F: Metro Fringe

Segment F01: Steadfast Conservatives

Home to high-school educated mature singles and couples living in middle-class urban bluecollar neighborhoods

Demographics

A quietly aging cluster, Steadfast Conservatives is home to mature singles and couples living in midscale urban neighborhoods. Households tend to be white, high school-educated and middle class. Many have begun to emptynest or are already filled with couples and singles aged 65 years or older. The seniority of many residents does have benefits in the workplace. They earn middle class incomes from skilled jobs in manufacturing, retail and health care. Their incomes go far, allowing residents to own older homes and multiple cars and trucks at higher than average rates.

Lifestyles

The residents of Steadfast Conservatives live up to their old fashioned reputation. They think the stock market is too risky, computers and the Internet too confusing and take preventive medicine before any sign of illness. They even regard aerobic exercise as too strenuous, preferring to spend their leisure time fishing, gardening, antiquing or doing needlework or woodworking. For their social life, they attend activities sponsored by fraternal orders, veterans clubs and church groups. As consumers, they're likely to be brand loyal when they shop at favorite stores like J.C. Penney for clothes, Dick's Sporting Goods for outdoor gear and Jo-Ann for needlecrafts. With their middle-class incomes, they make a strong automotive market, especially for American-made pickup trucks and mid-sized sedans. To further protect their established lifestyles, they buy a variety of insurance products— covering health, life, car and home—though primarily low-value policies.

Media

Households in Steadfast Conservatives are fans of traditional media, including print, TV and radio. They like to get their news from a daily paper or the nightly newscasts on network TV. They consider television as a primary source of entertainment in their lives, and they have high rates for watching sitcoms, reality shows, daytime soaps and religious programs. They enjoy reading magazines that appeal to their do-it-yourself sensibilities including popular titles as Family Handyman, Better Homes & Gardens and Country Living. Their radio tastes include a mix of big band, classic rock, country and golden oldies. These households are mostly unenthusiastic about the Internet, but when online they engage in chat forums and visit NASCAR.com.

Group F: Metro Fringe

Segment F02: Moderate Conventionalists

Highly mobile, middle-class singles and childless couples living in modest homes, semidetached houses and apartments scattered throughout second-tier cities

Demographics

With many key demographic measures close to the national average—including age, income and education— members of Moderate Conventionalists epitomize average Americans. Scattered throughout second-tier cities in the Midwest and West Coast, these singles and couples tend to live in modest homes, semi-detached houses and apartments. Most have completed high school or some college and parlayed well-paying blue-collar and whitecollar jobs into middle-class status. These predominantly childless households have low rates of homeownership and above-average rates of mobility. Moving vans are a frequent sight in this cluster, as young singles move into their first apartments and empty-nesting couples leave their homes for smaller retirement rentals.

Lifestyles

Members of Moderate Conventionalists lead active social lives. With the majority of residents unattached, these areas present an active social scene. Their favorite activities include dancing, bar hopping, bowling and playing pool. They're avid exercise buffs who like to play softball, tennis and volleyball. They travel frequently for business and pleasure, though their destinations are frequently to ocean beaches. They're big consumers for products that help them look their best such as cosmetics, toiletries and athletic gear. With their midscale incomes, these childless households have discretionary cash to spend on clothes and the latest tech gear. However, they can't be too extravagant since many are carrying plenty of debt with education and car loans.

Media

Despite all their socializing, Moderate Conventionalists find time to enjoy a variety of media—from newspapers and TV to movies and the Internet. They like to watch reality shows, sitcoms and evening animation such as "CSI," "King of the Hill," "E.R." and "Malcolm in the Middle." They read a lot of gaming, celebrity and sports magazines, such as Entertainment Weekly, Us, Sports Illustrated and GamePro. This is only a moderate market for radio programming, with country music and contemporary hit radio stations faring the best. Many of the young residents would rather spend their free time on the Internet, downloading games, looking for better jobs, surfing to sports websites and participating in chat forums.

Group H: Aspiring Contemporaries

Segment H03: Stable Careers

Young and ethnically diverse singles residing in low- and high-rise apartment buildings and living comfortable lifestyles in big-city metropolitan areas

Demographics

Stable Careers is a collection of young and ethnically diverse singles living in big-city metros as Los Angeles, CA, Philadelphia, PA and Miami, FL. A quarter of the households are of Hispanic and Asian and are slightly less affluent than others dominated by Generation Y residents. More than half of households have gone to college and most have landed white-collar jobs in retail, health services and professional offices. Without the financial responsibilities of children, these singles and couples stretch their incomes into comfortable lifestyles. Most of the households live in relatively new apartments—in both low- and high-rise buildings—and pay above-average rents for the in-town real estate.

Lifestyles

The households in Stable Careers enjoy urbane lifestyles. They take advantage of their urban settings to go to bars, restaurants, concerts and comedy clubs. These young singles are body conscious and spend a fair portion of their free time jogging, lifting weights and doing aerobic exercises at nearby health clubs. Often on the go, they rarely set foot inside banks, preferring ATM machines to pick up cash for shopping trips to stores like Target, Old Navy, Gap and Best Buy. Although they're drawn to the clearance racks when shopping for clothes, they're willing to spend extra money for electronic devices such as MP3 players, digital cameras and laptop computers. In Stable Careers, these budget-conscious consumers enjoy traveling as often as they can, but their trips are typically to U.S. cities and staying with friends and family.

Media

The media tastes skew young in Stable Careers. The households make a strong market for a variety of network TV offerings including reality shows, sitcoms, music and late-night programs, including TV shows such as "Saturday Night Live," "American Idol" and "Fear Factor." Most residents prefer compact cars, but they make a point of having high-end radios to play alternative rock, urban contemporary and contemporary hit music. Their taste in magazines reflects their pop sensibilities, with favorite publications such as Rolling Stone, Vanity Fair and Entertainment Weekly. As early tech adopters, the members of Stable Careers are computer literate, and they go online frequently to search for jobs, chat, download music and check out the local personal ads.

Group K: Urban Essence

Segment K04: Urban Diversity

Young and mobile multi-ethnic singles and single-parent families living in inter-city neighborhoods in a mix of rowhouses and high-rise apartment buildings

Demographics

With nearly half of households containing minorities, Urban Diversity is known as a transient world of young, multi-ethnic singles and single-parent families. In these inter-city neighborhoods, residents struggle against challenging economics in a mix of rowhouses and high-rise apartment buildings. Most adults have completed high school or some college, with many working at entry-level jobs in retail, health care and food services. With a high unemployment rate, the median income is a third below the general population, and sometimes it's a stretch for households to make the rent for their less-than-lavish apartments that nevertheless cost more than the U.S. average. Young and mobile, a disproportionate number have lived in their units less than a year and mostly alone.

Lifestyles

Modest incomes haven't kept the young members of Urban Diversity from leading vibrant lifestyles. They have high rates for going to nightclubs, theme parks, comedy clubs and bowling alleys. They enjoy an impressive number of athletic activities, from soccer and basketball to weight lifting and jogging. Residents describe themselves as the first among their friends to try a new store and fashion, but they also frequent retail chains like Old Navy, Marshalls and Mervyn's. With a third of households having children, this is a strong market for kids' products including toys, books, dolls, board games and easy-to-prepare foods such as lunch kits and frozen pizza. They buy consumer electronics for themselves and their kids, including video game devices, MP3 players and digital cameras. They claim they're not good at saving money, but prefer the safety of short-term CDs versus stocks or other investments.

Media

The households of Urban Diversity are omnivorous media fans. They describe themselves as TV addicts, radio lovers, regular movie-goers and Internet surfers. Television is still their entertainment source of choice, and they watch sitcoms, reality shows, evening animation and late-night talk shows all at high rates. On their radios, they gravitate to talk stations, Spanish programming and urban contemporary music. Residents alternate between reading ethnic-targeted magazines and mainstream titles covering music, parenting and popular culture. They pick up a daily newspaper for job and TV listings. These young households typically go online each day for a variety of activities, from finding sports scores and job openings to listening to streaming radio and trying their luck at gambling sites.

Ramsey, MN
Retail Match List
St Hwy 47 & 167th Ave



These retailers are good matches.

Retailer	Distance	Address	City	State
A&W DRIVE-IN	14.1	16777 MARKETPLACE DR	BIG LAKE	MN
ABERCROMBIE & FITCH	12.5	12415 ELM CREEK BLVD	MAPLE GROVE	MN
ALDI INC	5.6	3410 NORTHDALE BLVD	COON RAPIDS	MN
AMC THEATERS	10.8	10051 WOODCREST DR NW	COON RAPIDS	MN
AMF BOWLING CTR	14.9	6440 JAMES CIR N	BROOKLYN CENTER	MN
ANN TAYLOR	12.5	12265 ELM CREEK BLVD	MAPLE GROVE	MN
ARBY'S ROAST BEEF	6.2	3385 124TH AVE NW	COON RAPIDS	MN
ASHLEY FURNITURE HOMESTORE	12.2	6497 LABEAUX AVE	ALBERTVILLE	MN
BANANA REPUBLIC	12.2	6415 LABEAUX AVE	ALBERTVILLE	MN
BARNES AND NOBLE	12.0	8040 WEDGEWOOD LANE	MAPLE GROVE	MN
BASKIN-ROBBINS ICE CREAM	NONE KNOWN TO BE IN AREA			
BATH & BODY WORKS INC	12.2	6415 LABEAUX AVE	ALBERTVILLE	MN
BIG APPLE BAGELS	21.0	508 S LAKE ST	FOREST LAKE	MN
BIG BOY	NONE KNOWN TO BE IN AREA			
BIG O TIRES	NONE KNOWN TO BE IN AREA			
BLIMPIE SUBS & SALADS	19.8	788 CLEVELAND AVE SW	NEW BRIGHTON	MN
BOOKS A MILLION	NONE KNOWN TO BE IN AREA			
BREADEAUX PIZZA	NONE KNOWN TO BE IN AREA			
BRUEGGER'S BAGEL BAKERY	10.2	12525 ULYSSES ST	BLAINE	MN
BUILD A BEAR	21.0	12567 WAYZATA BLVD	MINNETONKA	MN
BURGER KING	3.6	7205 HWY 10 N	RAMSEY	MN
CACHE	21.0	12321 WAYZATA BLVD	MINNETONKA	MN
CAMPBOWWOW	18.9	2067 E CENTER CIR	PLYMOUTH	MN
CARIBOU COFFEE CO	3.5	14050 ST FRANCIS BLVD	RAMSEY	MN
CARVEL	NONE KNOWN TO BE IN AREA			
CATHERINES STORES CORP	12.2	6415 LABEAUX AVE NE	ALBERTVILLE	MN
CHAMPS SPORTS	12.8	209 NORTHTOWN DR NE	BLAINE	MN
CHICO'S	12.5	7817 MAIN ST N	MAPLE GROVE	MN
CHILI'S GRILL & BAR	11.5	1430 109TH AVE NE	BLAINE	MN
CHIPOTLE MEXICAN GRILL	5.9	3455 RIVER RAPIDS DR NW	COON RAPIDS	MN
CHUCK E CHEESE PIZZA	12.2	8943 UNIVERSITY AVE NE	BLAINE	MN
COLD STONE CREAMERY	5.9	3461 RIVER RAPIDS DR	COON RAPIDS	MN
COST PLUS WORLD MARKET	NONE KNOWN TO BE IN AREA			
COUNTRY KITCHEN RESTAURANT	16.8	7849 42ND AVE N	NEW HOPE	MN
COUSINS SUBS	3.7	6401 W HWY 10	RAMSEY	MN
CRABTREE & EVELYN	30.2	270 W MARKET	BLOOMINGTON	MN
CRACKER BARREL	40.0	17189 KENYON AVE	LAKEVILLE	MN
CRATE & BARREL	27.8	3503 GALLERIA	EDINA	MN
CUB FOODS	5.5	12900 RIVERDALE DR	COON RAPIDS	MN
CULVER'S	4.5	800 W MAIN ST	ANOKA	MN
CURVES	6.2	646 E RIVER RD	ANOKA	MN
CVS PHARMACY	4.7	3633 BUNKER LAKE BLVD	ANDOVER	MN
DAIRY QUEEN	4.8	3511 ROUND LAKE BLVD NW	ANOKA	MN
DAVID'S BRIDAL INC	12.4	12965 ELM CREEK BLVD	MAPLE GROVE	MN
DENNY'S RESTAURANT	5.4	3565 NORTHDALE BLVD	COON RAPIDS	MN
DOLLAR TREE	5.9	2288 BUNKER LAKE BLVD	ANDOVER	MN
DOTS INC	12.6	7601 W BROADWAY AVE	BROOKLYN PARK	MN
DUNKIN DONUTS	NONE KNOWN TO BE IN AREA			
ETHAN ALLEN GALLERIES	12.5	11751 FOUNTAINS WAY N	MAPLE GROVE	MN

Distance is the straight-line mileage from your site to nearest existing retailer location.

CommunityID

9/20/2011

Retailers with locations greater than fifty miles from this site are shown "**None known to be in area**."

Ramsey, MN
Retail Match List
St Hwy 47 & 167th Ave

Retailer	Distance	Address	City	State
FAMILY CHRISTIAN BOOK STORE	NONE KNOWN TO BE IN AREA			
FAMOUS DAVE'S	6.3	3211 NORTHDALE BLVD	COON RAPIDS	MN
FAZOLI'S	NONE KNOWN TO BE IN AREA			
FIGAROS ITALIAN KITCHEN	NONE KNOWN TO BE IN AREA			
FIVE GUYS	12.5	7814 MAIN ST N	MAPLE GROVE	MN
FOOTACTION U S A	30.3	102 EAST BROADWAY	BLOOMINGTON	MN
FOSSIL CO STORE	12.2	6500 LABEAUX AVE NE	ALBERTVILLE	MN
FOX'S PIZZA DEN	NONE KNOWN TO BE IN AREA			
GLIK'S DEPARTMENT STORE	NONE KNOWN TO BE IN AREA			
GLORIA JEAN'S GOURMET COFFEES	NONE KNOWN TO BE IN AREA			
GODFATHER'S PIZZA	6.5	12490 CHAMPLIN DR	CHAMPLIN	MN
GOLF U S A	29.2	8427 JOINER WAY	EDEN PRAIRIE	MN
GREAT HARVEST BREAD CO	23.3	17416 MINNETONKA BLVD	MINNETONKA	MN
GUESS RETAIL INC	30.3	260 SOUTH AVE	MINNEAPOLIS	MN
HOBBY LOBBY	NONE KNOWN TO BE IN AREA			
HOBBYTOWN USA	12.8	7632 BROOKLYN BLVD	BROOKLYN PARK	MN
HOOTERS	30.2	402 E BROADWAY	BLOOMINGTON	MN
HOT TOPIC	12.5	12455 ELM CREEK BLVD	MAPLE GROVE	MN
HY-VEE FOOD STORES INC	NONE KNOWN TO BE IN AREA			
IHOP	5.8	12792 RIVERDALE BLVD NW	COON RAPIDS	MN
J JILL THE STORE	12.5	12233 ELM CREEK BLVD	MAPLE GROVE	MN
JERSEY MIKE'S SUBMARINES	20.2	2704 HWY 88	ST ANTHONY VILLAGE	MN
JIMMY JOHN'S	3.5	14050 ST FRANCIS BLVD	RAMSEY	MN
JOSEPH A BANK CLOTHIERS	12.5	12215 ELM CREEK BLVD	MAPLE GROVE	MN
JOURNEYS	12.2	6415 LABEAUX AVE NE	ALBERTVILLE	MN
KFC	4.6	711 W MAIN ST	ANOKA	MN
KIRKLAND'S	12.5	12153 ELM CREEK BLVD	MAPLE GROVE	MN
LA Z BOY	NONE KNOWN TO BE IN AREA			
LENNY'S SUB SHOP	NONE KNOWN TO BE IN AREA			
LENS CRAFTERS INC	12.5	12131 ELM CREEK BLVD	MAPLE GROVE	MN
LITTLE CAESAR'S PIZZA	4.3	1100 W HWY 10	ANOKA	MN
LONE STAR STEAKHOUSE & SALOON	NONE KNOWN TO BE IN AREA			
LONGHORN STEAKHOUSE	NONE KNOWN TO BE IN AREA			
MAGGIE MOOS	33.1	9000 HUDSON RD	WOODBURY	MN
MARBLE SLAB CREAMERY	NONE KNOWN TO BE IN AREA			
MARCO'S PIZZA	NONE KNOWN TO BE IN AREA			
MARSHALLS	12.6	467 87TH LN NE	BLAINE	MN
MC DONALD'S	4.6	720 W MAIN ST	ANOKA	MN
MEDICINE SHOPPE	30.5	750 MAIN ST	MENDOTA HEIGHTS	MN
MERLE NORMAN COSMETICS	22.3	2100 SNELLING AVE N	ROSEVILLE	MN
MILIOS SANDWICHES	23.2	2620 E FRANKLIN AVE	MINNEAPOLIS	MN
MOES SOUTHWEST GRILL	NONE KNOWN TO BE IN AREA			
NAPA AUTO PARTS	6.2	733 E RIVER RD	ANOKA	MN
NEW YORK & CO	12.2	6415 LABEAUX AVE	ALBERTVILLE	MN
NICK-N-WILLY'S	32.2	3806 W OLD SHAKOPEE RD	BLOOMINGTON	MN
O'CHARLEY'S	NONE KNOWN TO BE IN AREA			
OLIVE GARDEN	11.8	150 COON RAPIDS BLVD	COON RAPIDS	MN
OUTBACK STEAKHOUSE	12.1	8880 SPRINGBROOK DR	COON RAPIDS	MN
PACIFIC SUNWEAR	12.3	6415 LA BEAUX AVE NE	ALBERTVILLE	MN
PAPA JOHN'S PIZZA	5.3	13055 RIVERDALE DR NW	COON RAPIDS	MN
PAPA MURPHY'S	7.7	19112 FREEPORT ST NW	ELK RIVER	MN
PENDLETON SHOPPE	27.8	3595 GALLERIA	EDINA	MN
PIZZA FACTORY	NONE KNOWN TO BE IN AREA			

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Ramsey, MN
Retail Match List
St Hwy 47 & 167th Ave

Retailer	Distance	Address	City	State
PIZZA RANCH	18.8	1220 HWY 25 S	MONTICELLO	MN
PLAY IT AGAIN SPORTS	7.7	19268 EVANS ST	ELK RIVER	MN
PLAY N TRADE	NONE KNOWN TO BE IN AREA			
POTTERY BARN	12.5	12225 ELM CREEK BLVD	MAPLE GROVE	MN
POWERHOUSE GYM	NONE KNOWN TO BE IN AREA			
PUMP IT UP	9.3	13941 LINCOLN ST NE	HAM LAKE	MN
QDOBA MEXICAN GRILL	12.5	12107 ELM CREEK BLVD	MAPLE GROVE	MN
QUIZNO	13.7	7610 UNIVERSITY AVE NE	MINNEAPOLIS	MN
RED ROBIN	18.4	2669 CAMPUS DR	PLYMOUTH	MN
REGAL CINEMAS	15.3	6420 CAMDEN AVE N	MINNEAPOLIS	MN
ROMANO'S MACARONI GRILL	20.9	11390 WAYZATA BLVD	MINNETONKA	MN
RUE 21	12.2	6415 LABEAUX AVE NE	ALBERTVILLE	MN
SAM'S WHOLESALE CLUB	10.9	16701 94TH AVE N	MAPLE GROVE	MN
SBARRO ITALIAN EATERY	22.0	1595 W HWY 36	ROSEVILLE	MN
SCHLOTZSKY'S DELI	27.4	3425 W 66TH ST	EDINA	MN
SPORT CLIPS	6.1	3540 MAIN ST NW	COON RAPIDS	MN
SPORTSMANS WAREHOUSE	NONE KNOWN TO BE IN AREA			
STAPLES THE OFFICE SUPERSTORE	20.9	11500 WAYZATA BLVD	MINNETONKA	MN
STARBUCKS	6.2	2000 BONKER LAKE BLVD NW	ANDOVER	MN
STEAK N SHAKE	NONE KNOWN TO BE IN AREA			
STRIDE RITE	27.5	2915 SOUTHDALE CENTER	EDINA	MN
T J MAXX	12.5	8081 BROOKLYN BLVD	BROOKLYN PARK	MN
TACO BELL	7.7	19131 FREEPORT AVE	ELK RIVER	MN
TACO DEL MAR	NONE KNOWN TO BE IN AREA			
THE CHILDREN'S PLACE	12.5	12157 ELM CREEK BLVD	MAPLE GROVE	MN
TUESDAY MORNING INC	19.9	10100 6TH AVE N	PLYMOUTH	MN
TUMBLEWEED SOUTHWEST MESQUITE	NONE KNOWN TO BE IN AREA			
UNO RESTAURANTS INC	NONE KNOWN TO BE IN AREA			
VICTORIA'S SECRET	12.3	UNIVERSITY AVE N & HWY 10	BLAINE	MN
WALGREENS	4.8	3605 ROUND LAKE BLVD	ANOKA	MN
WENDY'S	3.5	480 BUNKER LAKE BLVD NW	ANOKA	MN
WETZEL'S PRETZELS	NONE KNOWN TO BE IN AREA			
WHITE CASTLE RESTAURANT	6.2	3465 124TH AVE NW	COON RAPIDS	MN
WHITE HOUSE / BLACK MARKET	12.5	12277 ELM CREEK BLVD	MAPLE GROVE	MN
WILD BIRD CTR	43.4	103 DIVISION ST	WAITE PARK	MN
WILD BIRDS UNLIMITED	20.8	11210 WAYZATA BLVD	MINNETONKA	MN
WILLIAMS-SONOMA STORES INC	12.5	12229 ELM CREEK BLVD	MAPLE GROVE	MN
WINE STYLES	16.8	314 CLYDESDALE TRAIL	MEDINA	MN
WINGS TO GO	NONE KNOWN TO BE IN AREA			
ZUMIEZ	12.2	6500 LABEAUX AVE NE	ALBERTVILLE	MN

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Ramsey, MN
Retail Match List
St Hwy 47 & 167th Ave

These retailers match well but their existing locations are in close proximity of your site.

Retailer	Distance	Address	City	State
ACE HARDWARE	4.7	13735 ROUND LAKE BLVD NW	ANDOVER	MN
AEROPOSTALE INC	5.8	12768 RIVERDALE BLVD	COON RAPIDS	MN
AMERICAN EAGLE OUTFITTERS	5.8	12768 RIVERDALE BLVD NW	COON RAPIDS	MN
BATTERIES PLUS	6.5	2740 MAIN ST NW	COON RAPIDS	MN
BED BATH & BEYOND	5.8	12773 RIVERDALE BLVD	COON RAPIDS	MN
BEST BUY	5.9	12633 RIVERDALE BLVD NW	COON RAPIDS	MN
BUFFALO WILD WINGS	6.0	3395 RIVER RAPIDS DR	COON RAPIDS	MN
CARTRIDGE WORLD	5.9	12667 RIVERDALE BLVD	COON RAPIDS	MN
CHRISTOPHER & BANKS INC	5.8	12771 RIVERDALE BLVD NW	COON RAPIDS	MN
CLAIRE'S BOUTIQUE	5.8	12786 RIVERDALE BLVD	COON RAPIDS	MN
COSTCO	6.1	12547 RIVERDALE BLVD	COON RAPIDS	MN
DEB SHOP	5.9	12646 RIVERDALE BLVD	COON RAPIDS	MN
DICK'S SPORTING GOODS	5.9	12661 RIVERDALE BLVD	COON RAPIDS	MN
DISCOUNT TIRE CENTER	5.5	12921 RIVERDALE DR NW	COON RAPIDS	MN
DOMINO'S PIZZA	0.2	6014 167TH AVE NW	RAMSEY	MN
DRESS BARN	5.8	12761 RIVERDALE BLVD NW	COON RAPIDS	MN
FAMOUS FOOTWEAR	5.8	12761 RIVERDALE BLVD NW	COON RAPIDS	MN
FASHION BUG	5.5	12960 RIVERDALE DR	COON RAPIDS	MN
GREAT CLIPS	3.5	14050 ST FRANCIS BLVD	RAMSEY	MN
HALLMARK	5.8	12755 RIVERDALE BLVD NW	COON RAPIDS	MN
HOME DEPOT INC	6.1	3550 124TH AVE NW	COON RAPIDS	MN
JO-ANN FABRICS & CRAFTS	5.8	12779 RIVERDALE BLVD NW	COON RAPIDS	MN
KOHL'S DEPARTMENT STORES	5.8	12785 RIVERDALE BLVD NW	COON RAPIDS	MN
LANE BRYANT	5.8	12774 RIVERDALE BLVD NW	COON RAPIDS	MN
LIFETIME FITNESS	7.0	11989 CHAMPLIN DR	CHAMPLIN	MN
MAURICES	5.8	12776 RIVERDALE BLVD	COON RAPIDS	MN
MENARDS	6.3	3045 MAIN ST	COON RAPIDS	MN
MICHAEL'S	6.2	3460 124TH AVE NW	COON RAPIDS	MN
OLD NAVY CLOTHING CO	5.8	12767 RIVERDALE BLVD NW	COON RAPIDS	MN
ONCE UPON A CHILD	4.9	3401 ROUND LAKE BLVD	ANOKA	MN
PANERA BREAD	6.2	12465 RIVERDALE BLVD NW	COON RAPIDS	MN
PAYLESS SHOE SOURCE	5.5	12940 RIVERDALE DR NW	COON RAPIDS	MN
PEARLE VISION	5.8	12771 RIVERDALE BLVD	COON RAPIDS	MN
PEP BOYS	6.2	3325 124TH AVE NW	COON RAPIDS	MN
PERKINS	4.7	601 W MAIN ST	ANOKA	MN
PETSMART	5.9	3589 RIVER RAPIDS DR	COON RAPIDS	MN
SEPHORA	6.1	12550 RIVERDALE BLVD	COON RAPIDS	MN
SHERWIN-WILLIAMS CO	6.1	3564 MAIN ST NW	COON RAPIDS	MN
SPORTS AUTHORITY	6.2	3420 124TH AVE NW	COON RAPIDS	MN
TARGET	6.2	2000 BUNKER LAKE BLVD NW	ANDOVER	MN
TEXAS ROADHOUSE	6.5	2780 MAIN ST NW	COON RAPIDS	MN
TRACTOR SUPPLY CO	6.7	11150 179TH AVE NW	ELK RIVER	MN
TRUE VALUE HARDWARE	6.8	12325 CHAMPLIN DR	CHAMPLIN	MN
ULTA	5.9	3583 RIVER RAPIDS DR	COON RAPIDS	MN
WALMART	5.4	13020 RIVERDALE DR NW	COON RAPIDS	MN
YANKEE CANDLE CO	5.8	12782 RIVERDALE BLVD NW	COON RAPIDS	MN

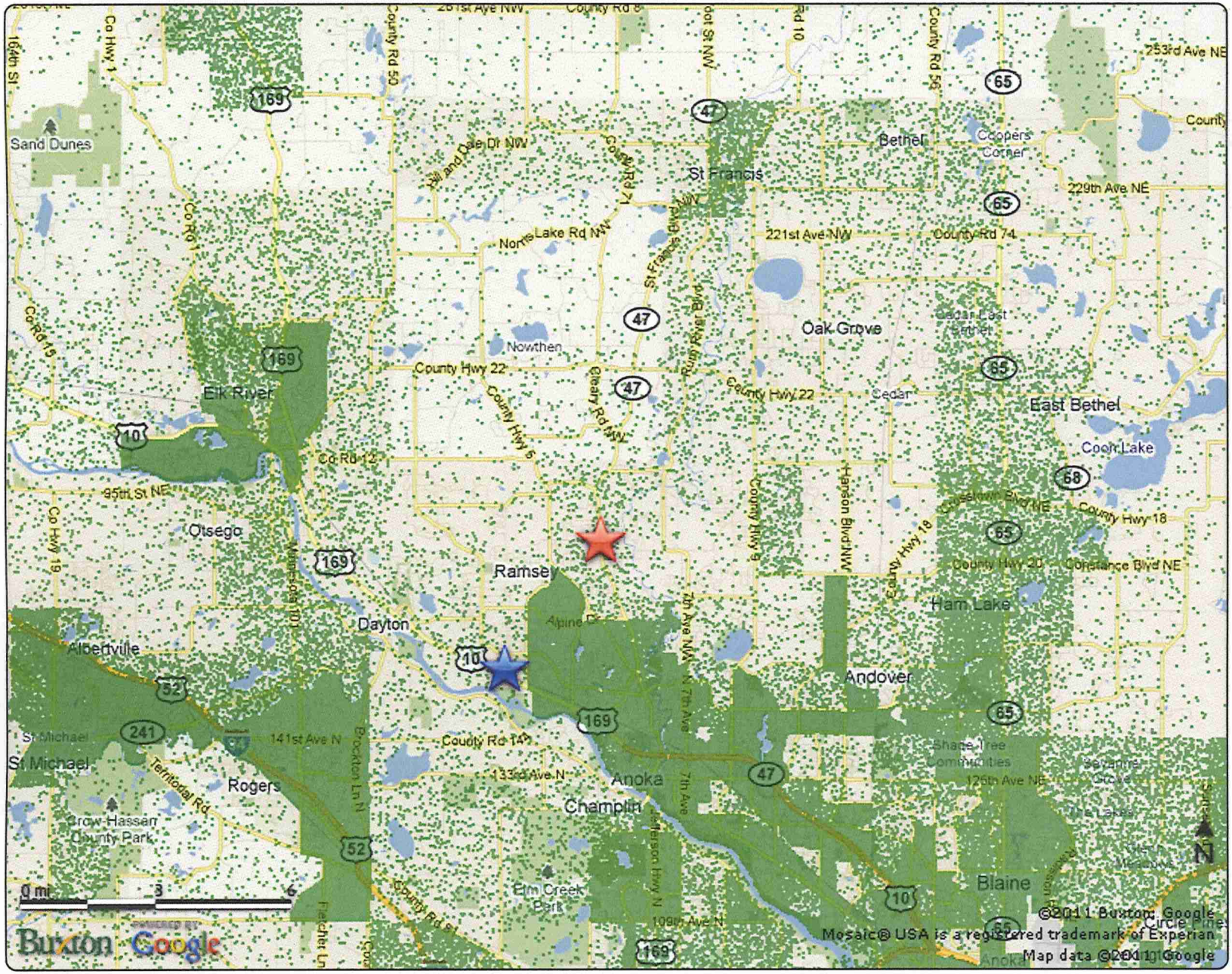
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No Site Selected



Sites

- Site1
- Site1 -12 Minute Drive Time
- Site2
- Site2 -12 Minute Drive Time

Dot Densities

Daytime Population

- Daytime Population

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Ramsey, MN
Operational Status of Retailers
St Hwy 47 & 167th Ave

Retailer	Concept	Website	Preferred Square Footage	Franchise?	Percent Franchise	Operating in MN?	Targeting MN for expansion?
A&W DRIVE-IN	Fast food	www.yum.com	2,000-3,500	YES	69%	YES	YES
ABERCROMBIE & FITCH	Apparel - children's, apparel - men's, apparel - women's	www.abercrombie.com	4,000-10,000	NO	0%	YES	YES
ACE HARDWARE	Hardware/home improvement	www.acehardware.com	10,000-20,000	NO	0%	YES	YES
AEROPOSTALE INC	Apparel - men's, apparel - women's	www.aeropostale.com	3,500	NO	0%	YES	YES
ALDI INC	Supermarkets	www.aldifoods.com	10,000-16,600	NO	0%	YES	YES
AMC THEATERS	Movie theaters	www.amctheatres.com	50,000-90,000	NO	0%	YES	YES
AMERICAN EAGLE OUTFITTERS	Apparel - men's, apparel - women's	www.ae.com	2,500-8,500	NO	0%	YES	YES
AMF BOWLING CTR	Amusement/play centers, specialty	www.amf.com	30,000-40,000	NO	0%	YES	YES
ANN TAYLOR	Apparel - women's	www.anntaylor.com	5,000-8,400	NO	0%	YES	YES
ARBY'S ROAST BEEF	Fast food	www.arbys.com	750-3,500	YES	70%	YES	YES
ASHLEY FURNITURE HOMESTORE	Furniture/beds	www.ashleyfurniture.com	55,000	NO	0%	YES	YES
BANANA REPUBLIC	Apparel - children's, apparel - men's, apparel - women's	www.gapinc.com	2,750-35,000	NO	0%	YES	YES
BARNES AND NOBLE	Book stores	www.barnesandnobleinc.com	2,800-67,500	NO	0%	YES	YES
BASKIN-ROBBINS ICE CREAM	Candy/ice cream/yogurt	www.dunkinbrands.com	1,500-2,200	YES	100%	YES	YES
BATH & BODY WORKS INC	Cosmetics/body care/fragrance	www.bathandbodyworks.com	1,700-8,000	NO	0%	YES	YES
BATTERIES PLUS	Computers/software, electronics, specialty	www.batteriesplus.com	1,200-1,800	YES	96%	YES	YES
BED BATH & BEYOND	Bed and bath linens, home decor/lamps/drapes	www.bedbathandbeyond.com	5,500-85,000	NO	0%	YES	YES
BEST BUY	Computers/software, electronics, major appliances	www.bestbuy.com	5,000-45,000	NO	0%	YES	YES
BIG APPLE BAGELS	Bakeries/bagels/pretzels, coffee bars/juice bars	www.babcorp.com	500-2,000	YES	99%	YES	YES
BIG BOY	Restaurants/bars	www.bigboy.com	5,200	YES	97%	NO	YES
BIG O TIRES	Auto supplies/car care	www.bigotires.com	35,000	YES	100%	NO	YES
BLIMPIE SUBS & SALADS	Fast food	www.kahalacorp.com	250-3,000	YES	75%	YES	YES
BOOKS A MILLION	Book stores	www.booksamillioninc.com	3,000-25,000	NO	0%	NO	YES
BREADEAUX PIZZA	Fast food	www.breadeauxpizza.com	800-2,000	YES	100%	YES	YES
BRUEGGER'S BAGEL BAKERY	Bakeries/bagels/pretzels, fast casual restaurants	www.brueggers.com	1,500-2,100	YES	50%	YES	YES
BUFFALO WILD WINGS	Restaurants/bars	www.buffalowildwings.com	5,000-7,000	YES	65%	YES	YES
BUILD A BEAR	Amusement/play centers, specialty	www.buildabear.com	1,500-3,000	NO	0%	YES	YES
BURGER KING	Fast food	www.bk.com	1,900-4,000	YES	86%	YES	YES
CACHE	Apparel - women's	www.cache.com	1,800-2,000	NO	0%	YES	YES
CAMPBOWWOW	Pets/animal supplies	www.campbowwowusa.com	7,500-10,000	NO	0%	YES	YES
CARIBOU COFFEE CO	Coffee bars/juice bars	www.cariboucoffee.com	1,600	YES	18%	YES	YES
CARTRIDGE WORLD	Specialty	www.cartridgeworld.com	800-1,400	YES	100%	YES	YES
CARVEL	Bakeries/bagels/pretzels, candy/ice cream/yogurt	www.focusbrands.com	500-3,000	YES	66%	YES	YES
CATHERINES STORES CORP	Apparel - women's	www.charmingshoppes.com	3,000-7,000	NO	0%	YES	YES
CHAMPS SPORTS	Shoes, sporting goods/athletic wear	www.footlocker-inc.com	2,000-5,000	NO	0%	YES	YES
CHICO'S	Accessories, apparel - women's	www.chicos.com	1,500-4,000	YES	1%	YES	YES
CHILI'S GRILL & BAR	Fast casual restaurants, restaurants/bars	www.brinker.com	5,000-16,000	YES	27%	YES	YES
CHIPOTLE MEXICAN GRILL	Fast casual restaurants	www.chipotle.com	1,200-2,800	NO	0%	YES	YES
CHRISTOPHER & BANKS INC	Apparel - women's	www.christopherandbanks.com	3,000-3,600	NO	0%	YES	YES
CHUCK E CHEESE PIZZA	Restaurants/bars, amusement/play centers	www.chuckecheese.com	12,000-18,000	YES	9%	YES	YES

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Information is drawn from our bes
known resources at the time of this study
Information specific to individual retailers is
subject to change.

Ramsey, MN
Operational Status of Retailers
St Hwy 47 & 167th Ave

Retailer	Concept	Website	Preferred Square Footage	Franchise?	Percent Franchise	Operating in MN?	Targeting MN for expansion?
CLAIRE'S BOUTIQUE	Accessories	www.clairestores.com	1,000-1,200	YES	5%	YES	YES
COLD STONE CREAMERY	Candy/ice cream/yogurt	www.kahalacorp.com	250-3,000	YES	75%	YES	YES
COST PLUS WORLD MARKET	China/glassware, furniture/beds, home decor/lamps/drapes	www.worldmarket.com	18,300	NO	0%	YES	YES
COSTCO	Furniture/beds, warehouses/wholesale clubs	www.costco.com	70,000-205,000	NO	0%	YES	YES
COUNTRY KITCHEN RESTAURANT	Restaurants/bars	www.countrykitchenrestaurants.com	4,500	YES	84%	YES	NO
COUSINS SUBS	Fast food	www.cousinssubs.com	1,400-2,000	YES	91%	YES	YES
CRABTREE & EVELYN	Cosmetics/body care/fragrance	www.crabtree-evelyn.com	700-900	NO	0%	YES	YES
CRACKER BARREL	Restaurants/bars	www.crackerbarrel.com	9,900	NO	0%	YES	YES
CRATE & BARREL	China/glassware, cutlery/kitchenware, furniture/beds, home decor/lamps/drapes	www.crateandbarrel.com	6,000-40,000	NO	0%	YES	YES
CUB FOODS	Beer/wine/liquor, supermarkets	0	65,000	YES	33%	YES	YES
CULVER'S	Candy/ice cream/yogurt, fast casual restaurants	www.culvers.com	4,000	YES	98%	YES	YES
CURVES	Health clubs/gyms	www.curvesforwomen.com	1,000-1,500	YES	100%	YES	YES
CVS PHARMACY	Drug stores	www.cvs.com	10,880-19,000	NO	0%	YES	YES
DAIRY QUEEN	Candy/ice cream/yogurt, fast food	www.idq.com	500-1,200	YES	99%	YES	YES
DAVID'S BRIDAL INC	Bridal/formal wear	www.davidsbridal.com	10,650	NO	0%	YES	YES
DEB SHOP	Apparel - men's, apparel - women's	www.debshops.com	7,500	NO	0%	YES	YES
DENNY'S RESTAURANT	Fast food, restaurants/bars	www.dennys.com	3,200-4,750	YES	77%	YES	NO
DICK'S SPORTING GOODS	Sporting goods/athletic wear	www.dickssportinggoods.com	50,000-60,000	NO	0%	YES	YES
DISCOUNT TIRE CENTER	Auto supplies/car care	www.tires.com	5,000-10,000	NO	0%	YES	YES
DOLLAR TREE	Dollar/variety stores	www.dollartree.com	9,000-15,000	NO	0%	YES	YES
DOMINO'S PIZZA	Fast food	www.dominos.com	1,000-1,300	YES	89%	YES	YES
DOTS INC	Apparel - women's	www.dots.com	4,000-5,000	NO	0%	YES	YES
DRESS BARN	Apparel - women's	www.dressbarn.com	4,000-8,000	NO	0%	YES	YES
DUNKIN DONUTS	Bakeries/bagels/pretzels	www.dunkinbrands.com	1,500-2,200	YES	100%	YES	YES
ETHAN ALLEN GALLERIES	Furniture/beds	www.ethanallen.com	6,000-35,000	YES	48%	YES	YES
FAMILY CHRISTIAN BOOK STORE	Specialty	www.familychristian.com	5,000-6,000	NO	0%	NO	YES
FAMOUS DAVE'S	Restaurants/bars	www.famousdaves.com	6,000-10,500	YES	72%	YES	YES
FAMOUS FOOTWEAR	Shoes	www.famousfootwear.com	6,000-8,000	NO	0%	YES	YES
FASHION BUG	Apparel - women's	www.charmingshoppes.com	3,000-7,000	NO	0%	YES	YES
FAZOLI'S	Fast casual restaurants	www.fazolis.com	3,500	YES	64%	YES	YES
FIGAROS ITALIAN KITCHEN	Fast food	www.figaros.com	1,000-1,500	YES	100%	YES	YES
FIVE GUYS	Restaurants/bars	www.fiveguys.com	2,000-3,000	YES	100%	YES	NO
FOOTACTION U S A	Shoes, sporting goods/athletic wear	www.footlocker-inc.com	2,000-5,000	NO	0%	YES	YES
FOSSIL CO STORE	Accessories, apparel - men's, apparel - women's, fine jewelry/watches	www.fossil.com	1,600-5,000	NO	0%	YES	YES
FOX'S PIZZA DEN	Fast food	www.foxspizza.com	800-1,800	YES	100%	NO	YES
GLIK'S DEPARTMENT STORE	Apparel - men's, apparel - women's, shoes	www.gliks.com	4,000-15,000	NO	0%	YES	NO
GLORIA JEAN'S GOURMET COFFEES	Coffee bars/juice bars	www.gloriajeans.com	750-2,500	YES	100%	NO	YES
GODFATHER'S PIZZA	Fast food	www.godfathers.com	3,600-4,000	YES	84%	YES	YES
GOLF U S A	Sporting goods/athletic wear	www.golfusa.com	2,500-7,000	YES	98%	YES	YES
GREAT CLIPS	Beauty salons	www.greatclips.com	900-1,200	YES	100%	YES	YES

CommunityID

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Ramsey, MN
Operational Status of Retailers
St Hwy 47 & 167th Ave

Retailer	Concept	Website	Preferred Square Footage	Franchise?	Percent Franchise	Operating in MN?	Targeting MN for expansion?
GREAT HARVEST BREAD CO	Bakeries/bagels/pretzels	www.greatharvest.com	1,500-2,500	YES	100%	YES	YES
GUESS RETAIL INC	Accessories, apparel - children's, apparel - men's, apparel - women's, off-price/outlet stores	www.guess.com	4,500	NO	0%	YES	YES
HALLMARK	Cards/stationery	www.hallmark.com	3,200-4,500	YES	86%	YES	YES
HOBBY LOBBY	Art supplies/crafts/hobbies	www.hobbylobby.com	23,000-55,000	NO	0%	YES	YES
HOBBYTOWN USA	Art supplies/crafts/hobbies, toys/games/video games	www.hobbytown.com	3,000-7,000	YES	100%	YES	YES
HOME DEPOT INC	Hardware/home improvement	www.homedepot.com	2,400-150,000	NO	0%	YES	YES
HOOTERS	Restaurants/bars	www.hooters.com	4,000-4,500	YES	73%	YES	YES
HOT TOPIC	Accessories, apparel - men's, apparel - women's	www.hottopic.com	1,500-2,500	NO	0%	YES	YES
HY-VEE FOOD STORES INC	Supermarkets, drug stores	www.hy-vee.com	15,000-42,877	NO	0%	YES	YES
IHOP	Restaurants/bars	www.ihop.com	4,020-5,000	YES	95%	YES	YES
J JILL THE STORE	Apparel - women's, shoes	www.thetalbotsinc.com	2,100-10,000	NO	0%	YES	YES
JERSEY MIKE'S SUBMARINES	Fast food	www.jerseymikes.com	1,200-1,400	YES	63%	YES	YES
JIMMY JOHN'S	Fast casual restaurants	www.jimmyjohns.com	900-1,500	YES	97%	YES	YES
JO-ANN FABRICS & CRAFTS	Fabrics, art supplies/crafts/hobbies	www.joann.com	14,000-35,000	NO	0%	YES	YES
JOSEPH A BANK CLOTHIERS	Apparel - men's, off-price/outlet stores	www.josbank.com	4,000-4,500	YES	2%	YES	YES
JOURNEYS	Accessories, apparel - men's, apparel - women's, shoes, off-price/outlet stores	www.genesco.com	150-3,000	NO	0%	YES	YES
KFC	Fast food	www.yum.com	2,000-3,500	YES	69%	YES	YES
KIRKLAND'S	Home decor/lamps/drapes	www.kirklands.com	4,200-5,000	NO	0%	YES	YES
KOHL'S DEPARTMENT STORES	Department stores	www.kohls.com	75,000-133,000	NO	0%	YES	YES
LA Z BOY	Furniture/beds	www.lazboy.com	15,519-20,479	NO	0%	YES	YES
LANE BRYANT	Apparel - women's	www.charmingshoppes.com	3,000-7,000	NO	0%	YES	YES
LENNY'S SUB SHOP	Fast food	www.lennyssubshop.com	10,000-20,000	NO	0%	NO	YES
LENS CRAFTERS INC	Optical/eyewear	www.luxottica.com	150-4,000	NO	0%	YES	YES
LIFETIME FITNESS	Health clubs/gyms	www.lifetimefitness.com	110,000	NO	0%	YES	YES
LITTLE CAESAR'S PIZZA	Fast food	www.littlecaesars.com	1,200-1,600	YES	87%	YES	YES
LONE STAR STEAKHOUSE & SALOON	Restaurants/bars	www.lonestarsteakhouse.com	5,800-16,500	NO	0%	NO	YES
LONGHORN STEAKHOUSE	Restaurants/bars	www.dardenrestaurants.com	5,500-8,600	NO	0%	YES	YES
MAGGIE MOOS	Candy/ice cream/yogurt	www.nexcenbrands.com	400-12,000	YES	60%	YES	YES
MARBLE SLAB CREAMERY	Candy/ice cream/yogurt	www.nexcenbrands.com	400-12,000	YES	60%	YES	YES
MARCO'S PIZZA	Fast food	www.marcos.com	1,200-2,200	YES	67%	NO	YES
MARSHALLS	Apparel - children's, apparel - men's, apparel - women's, home decor/lamps/drapes	www.tjx.com	25,000-65,000	NO	0%	YES	YES
MAURICES	Apparel - women's	www.maurices.com	4,500-5,500	NO	0%	YES	YES
MC DONALD'S	Fast food	www.mcdonalds.com	600-5,500	YES	76%	YES	YES
MEDICINE SHOPPE	Drug stores	www.medshoppe.com	2,000	YES	100%	YES	YES
MENARDS	Hardware/home improvement, wall coverings/paint	www.menards.com	80,000-240,000	NO	0%	YES	YES
MERLE NORMAN COSMETICS	Cosmetics/body care/fragrance	www.merlenorman.com	400-1,000	YES	100%	YES	YES
MICHAEL'S	Art/collectibles/frames, art supplies/crafts/hobbies	www.michaels.com	5,800-18,200	NO	0%	YES	YES
MILIOS SANDWICHES	Fast food	www.milios.com	2,500	NO	0%	YES	YES
MOES SOUTHWEST GRILL	Fast food	www.focusbrands.com	500-3,000	YES	66%	YES	YES
NAPA AUTO PARTS	Auto supplies/car care	www.genpt.com	5,000-7,000	YES	81%	YES	YES

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Ramsey, MN
Operational Status of Retailers
St Hwy 47 & 167th Ave

Retailer	Concept	Website	Preferred Square Footage	Franchise?	Percent Franchise	Operating in MN?	Targeting MN for expansion?
NEW YORK & CO	Apparel - women's	www.nyandcompany.com	6,000-8,000	NO	0%	YES	YES
NICK-N-WILLY'S	Fast casual restaurants	www.nicknwillyspizza.com	1,200-1,600	YES	100%	YES	YES
O'CHARLEY'S	Restaurants/bars	www.ocharleys.com	7,000-10,000	YES	5%	NO	YES
OLD NAVY CLOTHING CO	Apparel - children's, apparel - men's, apparel - women's	www.gapinc.com	2,750-35,000	NO	0%	YES	YES
OLIVE GARDEN	Restaurants/bars	www.dardenrestaurants.com	5,500-8,600	NO	0%	YES	YES
ONCE UPON A CHILD	Apparel - children's, musical instruments/supplies, sporting goods/athletic wear, specialty	www.winmarkcorporation.com	2,500-3,500	YES	100%	YES	YES
OUTBACK STEAKHOUSE	Restaurants/bars	www.osirestaurantpartners.com	5,500-7,500	YES	14%	YES	YES
PACIFIC SUNWEAR	Apparel - men's, apparel - women's	www.pacsun.com	3,500-4,500	NO	0%	YES	YES
PANERA BREAD	Bakeries/bagels/pretzels, fast casual restaurants	www.panera.com	4,200-5,000	YES	57%	YES	YES
PAPA JOHN'S PIZZA	Fast food	www.papajohns.com	1,100-1,500	YES	77%	YES	YES
PAPA MURPHY'S	Fast food	www.papamurphys.com	1,200-1,800	YES	98%	YES	YES
PAYLESS SHOE SOURCE	Shoes	www.paylessshoesource.com	3,000	NO	0%	YES	YES
PEARLE VISION	Optical/eyewear	www.luxottica.com	150-4,000	NO	0%	YES	YES
PENDLETON SHOPPE	Apparel - men's, apparel - women's	www.pendleton-usa.com	2,000	NO	0%	YES	YES
PEP BOYS	Auto supplies/car care	www.pepboys.com	20,000	NO	0%	YES	YES
PERKINS	Restaurants/bars	www.perkinsrestaurants.com	4,200-7,100	YES	58%	YES	YES
PETSMART	Pets/animal supplies	www.petsmart.com	19,000-27,000	NO	0%	YES	YES
PIZZA FACTORY	Restaurants/bars	www.pizzafactory.com	200-5,000	YES	100%	NO	YES
PIZZA RANCH	Restaurants/bars	www.pizzaranch.com	4,000-10,000	YES	94%	YES	YES
PLAY IT AGAIN SPORTS	Sporting goods/athletic wear, specialty	www.winmarkcorporation.com	2,500-3,500	YES	100%	YES	YES
PLAY N TRADE	Toys/games/video games	www.playntrade.com	4,000-5,000	NO	0%	YES	YES
POTTERY BARN	Bed and bath linens, china/glassware, cutlery/kitchenware, home decor/lamps/drapes	www.williams-sonomainc.com	1,800-20,000	NO	0%	YES	YES
POWERHOUSE GYM	Health clubs/gyms	www.powerhousegym.com	9,000-12,000	YES	36%	YES	YES
PUMP IT UP	Amusement/play centers	www.pumpitupparty.com	3,500-12,000	YES	72%	YES	YES
QDOBA MEXICAN GRILL	Fast casual restaurants, restaurants/bars	www.qdoba.com	2,000-2,400	YES	84%	YES	YES
QUIZNO	Fast casual restaurants	www.quiznos.com	1,200-1,600	YES	100%	YES	YES
RED ROBIN	Restaurants/bars	www.redrobin.com	6,350	YES	34%	YES	YES
REGAL CINEMAS	Movie theaters	www.regalcinemas.com	60,000-100,000	NO	0%	YES	YES
ROMANO'S MACARONI GRILL	Fast casual restaurants, restaurants/bars	www.brinker.com	5,000-16,000	YES	27%	YES	YES
RUE 21	Apparel - men's, apparel - women's	www.rue21.com	4,000-5,000	NO	0%	YES	YES
SAM'S WHOLESALE CLUB	Warehouses/wholesale clubs	www.samsclub.com	110,000-130,000	NO	0%	YES	YES
SBARRO ITALIAN EATERY	Fast food, restaurants/bars	www.sbarro.com	300-5,000	YES	37%	YES	YES
SCHLOTZSKY'S DELI	Fast casual restaurants	www.schlotzskys.com	2,400-2,800	YES	94%	YES	YES
SEPHORA	Cosmetics/body care/fragrance	www.sephora.com	5,200-5,700	NO	0%	YES	YES
SHERWIN-WILLIAMS CO	Wall coverings/paint	www.sherwinwilliams.com	3,000-6,000	NO	0%	YES	YES
SPORT CLIPS	Beauty salons	www.sportclips.com	1,000-1,400	NO	0%	YES	YES
SPORTS AUTHORITY	Sporting goods/athletic wear	www.thesportsauthority.com	35,000-85,000	NO	0%	YES	YES
SPORTSMANS WAREHOUSE	Sporting goods/athletic wear	www.sportsmanswarehouse.com	50,000	NO	0%	YES	YES
STAPLES THE OFFICE SUPERSTORE	Computers/software, electronics, office supplies/furniture	www.staples.com	10,000-20,000	NO	0%	YES	YES
STARBUCKS	Coffee bars/juice bars	www.starbucks.com	100-2,000	NO	0%	YES	YES

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Ramsey, MN
Operational Status of Retailers
St Hwy 47 & 167th Ave

Retailer	Concept	Website	Preferred Square Footage	Franchise?	Percent Franchise	Operating in MN?	Targeting MN for expansion?
STEAK N SHAKE	Restaurants/bars	www.steaknshake.com	3,800	YES	12%	NO	YES
STRIDE RITE	Shoes	www.strideritecorporation.com	1,000-3,000	NO	0%	YES	YES
T J MAXX	Apparel - children's, apparel - men's, apparel - women's, home decor/lamps/drapes	www.tjx.com	25,000-65,000	NO	0%	YES	YES
TACO BELL	Fast food	www.yum.com	2,000-3,500	YES	69%	YES	YES
TACO DEL MAR	Fast food	www.tacodelmar.com	1,200-1,500	NO	0%	NO	YES
TARGET	Discount stores, supercenters	www.target.com	123,000-174,000	NO	0%	YES	YES
TEXAS ROADHOUSE	Restaurants/bars	www.texasroadhouse.com	6,300-7,100	YES	22%	YES	YES
THE CHILDREN'S PLACE	Apparel - children's, toys/games/video games	www.childrensplace.com	4,000-6,500	NO	0%	YES	YES
TRACTOR SUPPLY CO	Agricultural/farm supplies	www.mytscstore.com	20,000-25,000	NO	0%	YES	YES
TRUE VALUE HARDWARE	Hardware/home improvement	www.truevaluecompany.com	3,500-15,000	NO	0%	YES	YES
TUESDAY MORNING INC	Close-out stores	www.tuesdaymorning.com	8,000-10,000	NO	0%	YES	YES
TUMBLEWEED SOUTHWEST MESQUITE	Restaurants/bars	www.tumbleweedrestaurants.com	5,400	YES	45%	NO	YES
ULTA	Cosmetics/body care/fragrance	www.ulta.com	10,000	NO	0%	YES	YES
UNO RESTAURANTS INC	Restaurants/bars	www.unos.com	5,500-6,000	YES	38%	YES	YES
VICTORIA'S SECRET	Apparel - women's	www.victoriassecret.com	3,900-4,500	NO	0%	YES	YES
WALGREENS	Drug stores	www.walgreens.com	14,560	NO	0%	YES	YES
WALMART	Supermarkets, discount stores, supercenters	www.walmartstores.com	5,000-233,000	NO	0%	YES	YES
WENDY'S	Fast food	www.wendys.com	3,000-6,000	YES	77%	YES	YES
WETZEL'S PRETZELS	Bakeries/bagels/pretzels	www.wetzels.com	500-800	YES	100%	YES	YES
WHITE CASTLE RESTAURANT	Fast food	www.whitecastle.com	2,000-3,000	NO	0%	YES	YES
WHITE HOUSE / BLACK MARKET	Accessories, apparel - women's	www.chicos.com	1,500-4,000	YES	1%	YES	YES
WILD BIRD CTR	Pets/animal supplies	www.wildbird.com	1,500-2,400	YES	5%	YES	YES
WILD BIRDS UNLIMITED	Pets/animal supplies	www.wildbird.com	1,500-2,400	YES	5%	YES	YES
WILLIAMS-SONOMA STORES INC	Bed and bath linens, china/glassware, cutlery/kitchenware, home decor/lamps/drapes	www.williams-sonomainc.com	1,800-20,000	NO	0%	YES	YES
WINE STYLES	Beer/wine/liquor	www.winestyles.net	1,200-2,000	YES	100%	YES	YES
WINGS TO GO	Fast food	www.wingstogo.com	1,200-2,000	YES	100%	NO	YES
YANKEE CANDLE CO	Specialty	www.yankeecandle.com	1,300-2,000	NO	0%	YES	YES
ZUMIEZ	Apparel - men's, apparel - women's, shoes	www.zumiez.com	3,000	NO	0%	YES	YES

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Ramsey, MN

As a Location For

Bass Pro Shops

Prepared April 2009

Buxton®
IDentifying Customers®

Table of Contents

Executive Summary

San Antonio, TX Comparison

Orlando, FL Comparison

St. Charles, MO Comparison

Executive Summary

On behalf of the City of Ramsey, MN, Buxton conducted a comparative analysis between Ramsey and three Bass Pro locations. These retailer locations were included in this analysis based on 60 minute trade area similarities to Ramsey. The three Bass Pro locations, San Antonio, TX; Orlando, FL; and St. Charles, MO are used in the comparison are located in similar markets and share Ramsey's BUDS (Buxton Urban Density) score of two. Ramsey is a BUDS2 area, but it on the verge of becoming a BUDS3 and is adjacent to BUDS3 areas. San Antonio is a BUDS2 location, while Orlando and St. Charles are BUDS3 locations.

(BUDS) Buxton Urban Density is a classification tool that measures the range between highly urban and highly rural areas. Urban densities, as defined by Buxton, are shown in the table below.

BUDS	Definition
1	Rural
2	In Town
3	Suburban/Small City
4	Metropolitan
5	High-Rise Living/Urban

Demographic Analysis

Buxton conducted a demographic analysis based on a 60 minute drive time to compare Ramsey with each benchmark profile (the demographic profile of each comparable location). The Ramsey profile and the benchmark profile were indexed against one another to determine how Ramsey compares to the average demographic profile of the Bass Pro locations. A comparison index value of 100 indicates that Ramsey matches the benchmark profile for a given demographic variable. A score above 100 indicates that Ramsey surpasses the benchmark profile. Conversely, a score below 100 indicates that Ramsey is below the benchmark profile.

Psychographic Analysis

Indexed Variables Within the Segmentation System

One of the major advantages of the segmentation system is the embedded index values for certain behaviors and lifestyles. Thousands of lifestyle categories are indexed within the segmentation system allowing for a ranking on those lifestyle characteristics by segment. Categories include everything from vehicle purchasing habits, media usage such as television shows and magazine subscriptions, healthcare behaviors including doctor visits and prescription medication purchases, to show how each segment is most likely to spend their free time and disposable income. These indexes are given to each segment within a category, and an index above 100 is more likely than average to have that particular trait.

For Example, under a category of "Eat at Applebee's Once a Month" Segment 20 has an index of 177 and Segment 59 has an index of 37. With the average index set at 100, we can determine that Segment 20 is 77% more likely than the average household to eat at Applebee's once a month, and Segment 59 is 63% less likely than the average household to eat at Applebee's once a month.

Outdoor Recreation Variables

The seven variables used in this study included the likelihood of a household segment to:

Go Hunting With a Gun Once in the Past Year
Go Freshwater Fishing Once in the Past Year
Go Canoeing/Kayaking Once in the Past Year
Go Camping 4+ Times Per Year
Go Backpacking/Hiking Once in the Past Year
Buy a Tent in the Past Year
Buy Fishing Equipment in the Past Year

Only the household segments that were the most likely to exhibit the behaviors of at least four of the seven variables were included in the Outdoor Recreation Profile. A count of these outdoor-oriented household segments within 60 minutes of the Ramsey Site was compared to the counts of the households within 60 minutes of the comparable Bass Pro locations. The Ramsey trade area has a much higher density of these specific households than any of the comparable locations.

Psychographic Analysis (cont)

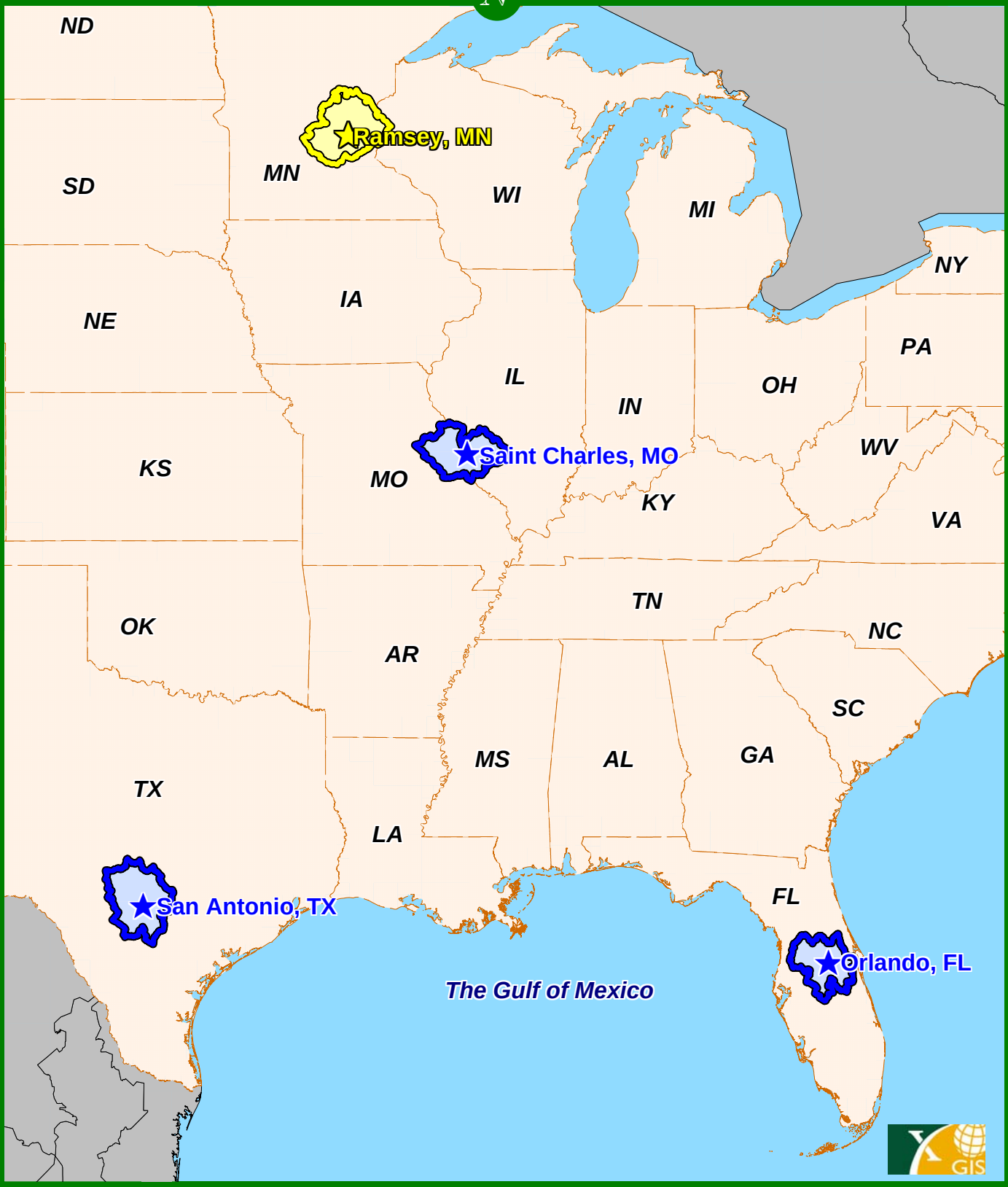
Using the indexes embedded in the segmentation system for each of these variables, we identified the segments that were the most likely to have the buying and leisure habits listed above. Only those segments that were in the highest group of likelihood for at least 4 out of the 7 variables were used in the Outdoor Recreation Profile for the City of Ramsey and Wayne County.

Buxton found that the household segments that had the highest propensity for the above variables are Segment 17 (Beltway Boomers), Segment 20 (Fast-Track Families), Segment 25 (Country Casuals), Segment 33 (Big Sky Families), Segment 43 (Heartlanders), Segment 45 (Blue Highways), Segment 51 (Shotguns & Pickups), Segment 64 (Bedrock America). The table below shows the counts of the households that fall within each identified segment:

		Existing Bass Pro Locations			
MRI Variable Profile	*Segments*	*San Antonio, TX*	*Orlando, FL*	*St. Charles, MO*	*Ramsey, MN*
Outdoor Recreation Profile	17,20,25,33,43,45,51,64	80,720	113,299	104,922	120,835

The maps on the following pages show the City of Ramsey and its location in repect to the comparable Bass Pro locations.

Data Sources: Claritas, Inc., Prizm®NE, 2008 , InfoUSA, Inc., © 2008 , National Research Bureau, © 2008 , MediamarkResearch, Inc., © 2008 , Geographic Data Technology, Inc. © 2008



Ramsey, Minnesota: Trade Area

City of RAMSEY

CommunityID

Comparable Bass Pro 60 Minute Drive Time

Ramsey, MN 60 Minute Drive Time

Comparable Bass Pro Locations

Ramsey, MN

Miles

0 150 300

2651 S. Polaris Dr. Fort Worth, Texas 76137 tel: 817.332.3681 fax:817.332.3686 e-mail:buxton@buxtonco.com http://www.buxtonco.com

Benchmark Demographics

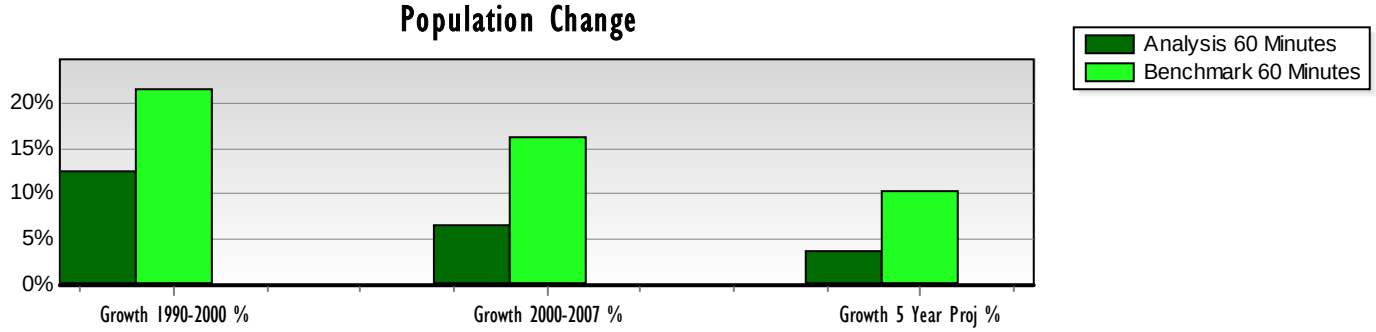
Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Population Profile	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
2012 Projection	2,759,653	2,304,499	120
2007 Estimate	2,661,842	2,089,245	127
2000 Census	2,497,294	1,798,354	139
1990 Census	2,217,956	1,479,748	150

Population Change

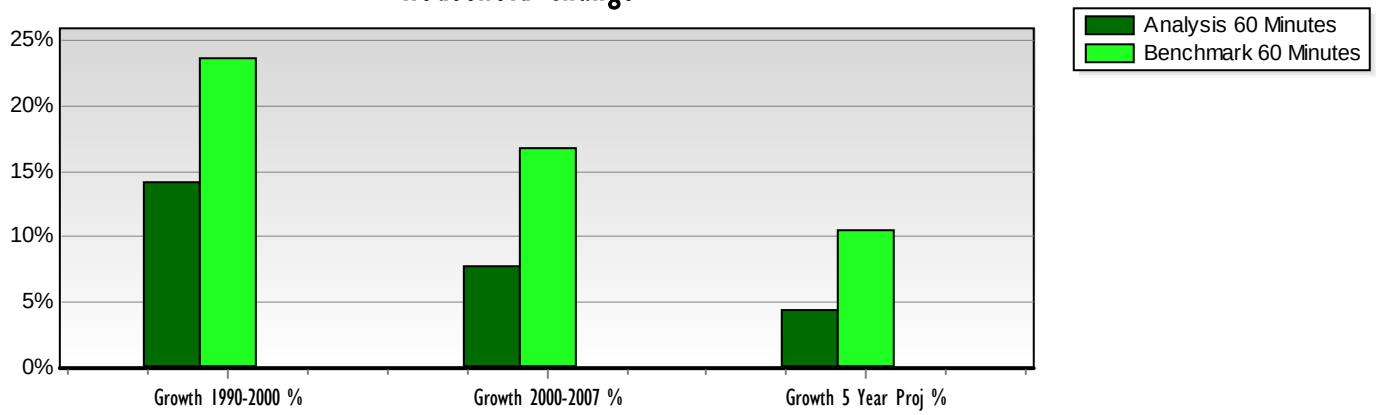


Work Place Population	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Total	1,914,486	1,171,143	163

Household Profile

2012 Projection	1,092,495	821,606	133
2007 Estimate	1,045,510	742,922	141
2000 Census	970,674	636,472	153
1990 Census	850,619	514,816	165

Household Change



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*Comparison Index: Average is 100; Less than 100: Red; 100 and Above: Green

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Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Population By Sex (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Male	49.7%	48.9%	102
Female	50.3%	51.1%	98
Marital Status Persons (Current)			
Single Male	16.2%	13.9%	117
Single Female	13.7%	12.0%	114
Married	55.9%	57.9%	97
Male Previously Married	4.9%	5.3%	92
Female Previously Married	9.2%	10.8%	86
Households by Household Type (Current)			
Family Household	64.2%	71.1%	90
Non-Family Household	35.8%	28.9%	124
Households By Type (Current)			
Single Male	12.8%	10.3%	123
Single Female	16.0%	13.0%	123
Married Couple	51.1%	53.5%	95
Other Family: Male Head of Household	3.6%	4.2%	85
Other Family: Female Head of Household	9.5%	13.4%	71
Non-Family: Male Head of Household	4.0%	3.1%	128
Non-Family: Female Head of Household	3.0%	2.4%	125
Households with Kids (Current)			
Total	359,559	296,713	121
Group Quarters Population by Type (Current)			
College Dormitories	20,310	12,121	168
Correctional Institutions	9,322	9,221	101
Military Quarters	1	10,426	0
Nursing Homes	19,199	10,905	176
Other Institutions	2,586	2,786	93
Other Noninstitutional	16,032	9,005	178
Total Group Quarters Population	**67,450**	**54,464**	**124**

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*Comparison Index: Average is 100; Less than 100: Red; 100 and Above: Green

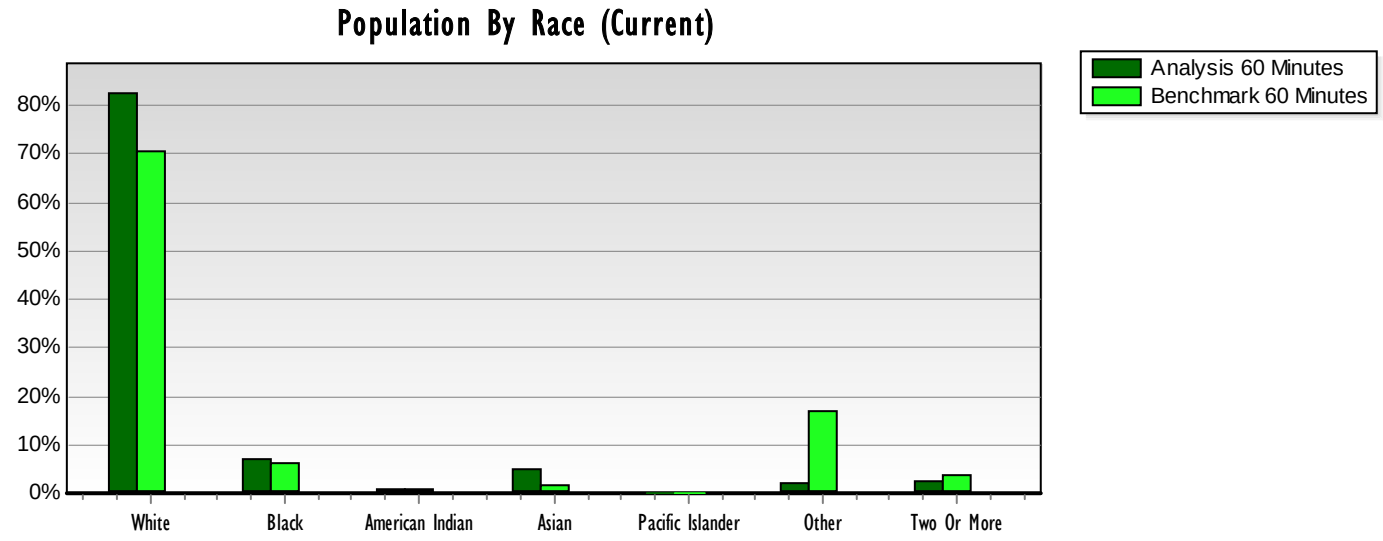
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Population By Race (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
White	2,195,462	1,475,763	149
Black	185,855	125,968	148
American Indian	23,989	17,489	137
Asian	130,974	35,395	370
Pacific Islander	1,459	2,167	67
Other	56,341	354,913	16
Two Or More	67,762	77,550	87
Total Population By Race	**2,661,842**	**2,089,245**	**127**



Population By Hispanic Origin (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Hispanic Origin	124,129	1,067,586	12
Non Hispanic Origin	2,537,713	1,021,659	248

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Benchmark Demographics

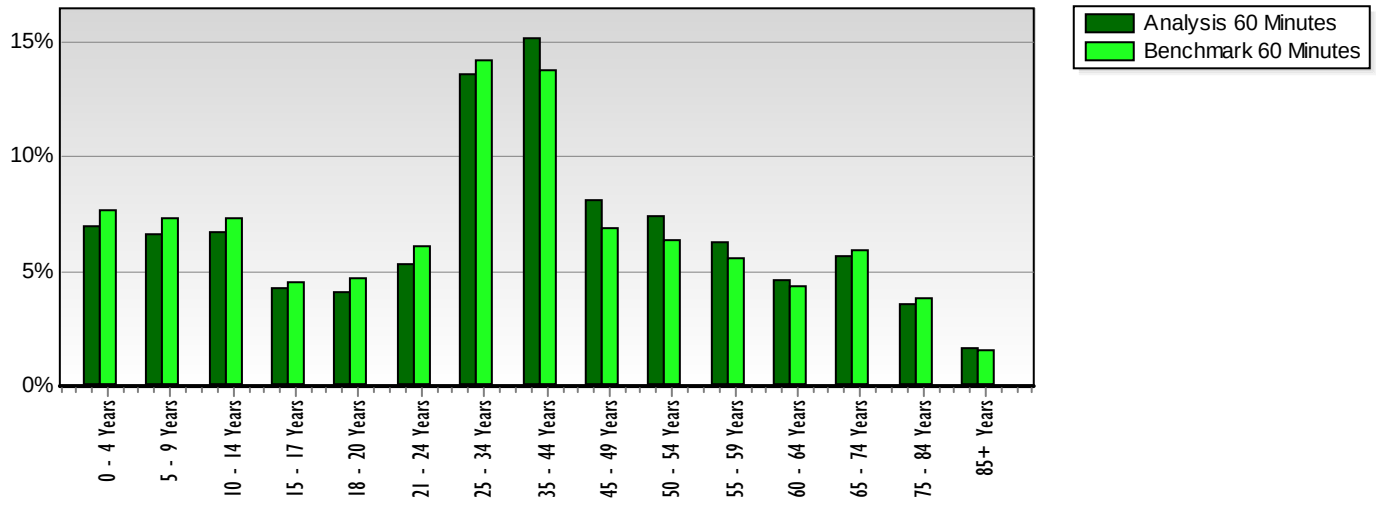
Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Population By Age (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
0 to 4 years	185,115	160,716	115
5 to 9 years	177,195	153,023	116
10 to 14 years	178,767	152,325	117
15 to 17 years	113,332	94,343	120
18 to 20 years	109,460	98,632	111
21 to 24 years	141,118	127,207	111
25 to 34 years	360,545	295,739	122
35 to 44 years	403,267	287,441	140
45 to 49 years	216,182	144,562	150
50 to 54 years	196,175	131,945	149
55 to 59 years	167,556	117,110	143
60 to 64 years	122,689	90,506	136
65 to 74 years	151,063	122,907	123
75 to 84 years	94,814	80,331	118
85+ Years	44,564	32,458	137
Total Population By Age	**2,661,842**	**2,089,245**	**127**
Average Age	36.9	35.5	104
Median Age	37.3	34.8	107

Population By Age (Current)



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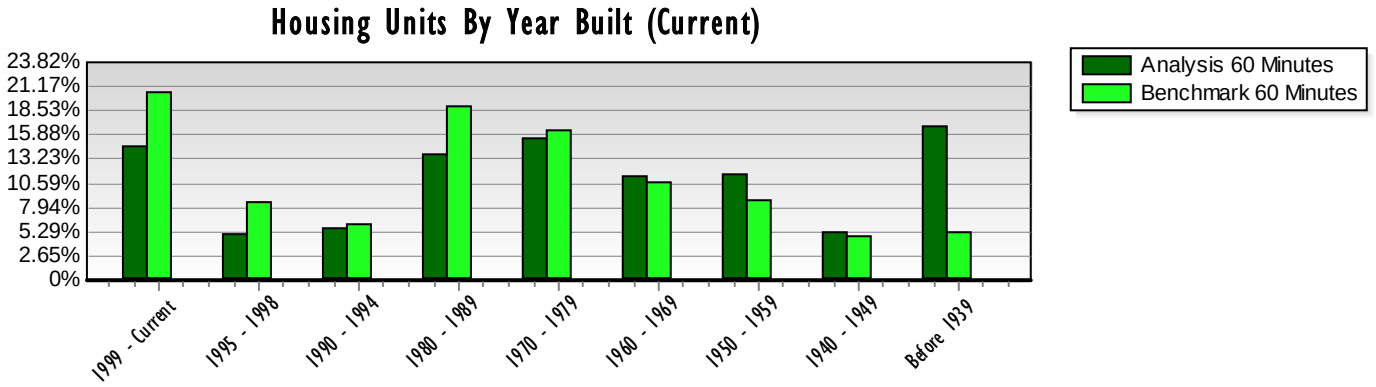
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Housing Units By Year Built (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
1999 to Current	162,214	164,877	98
1995 to 1998	55,902	68,793	81
1990 to 1994	64,207	48,453	133
1980 to 1989	153,389	153,088	100
1970 to 1979	173,217	131,751	131
1960 to 1969	126,884	86,794	146
1950 to 1959	127,863	69,707	183
1940 to 1949	58,487	37,783	155
Before 1939	187,093	41,377	452



Housing Units By Type (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Single-Unit Detached	62.7%	65.9%	95
Single-Unit Attached	6.6%	2.8%	239
Multi-Units 2	3.5%	1.9%	188
Multi-Units 3 - 19	9.7%	13.2%	73
Multi-Units 20 - 49	6.3%	2.3%	271
Multi-Units 50+	8.5%	5.5%	155
Mobile	2.5%	8.0%	31
Other	0.1%	0.3%	28

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Benchmark Demographics

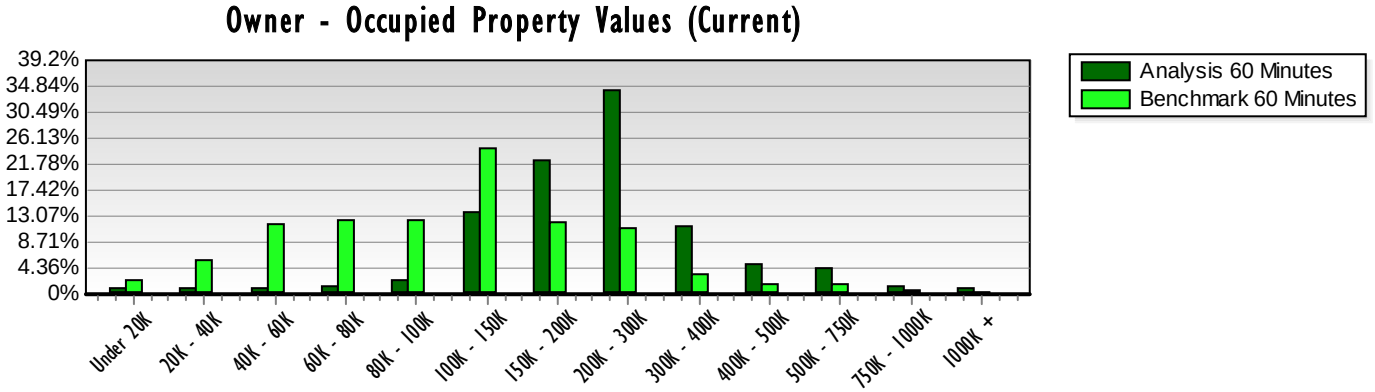
Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Housing Units By Occupancy (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Owner - Occupied	67.8%	60.4%	112
Renter - Occupied	26.4%	32.1%	82
Vacant	5.7%	7.4%	77

Owner - Occupied Property Values (Current)			
Under $20,000	7,474	11,568	65
$20,000 to $39,999	6,824	28,403	24
$40,000 to $59,999	7,087	56,159	13
$60,000 to $79,999	10,458	60,722	17
$80,000 to $99,999	18,059	60,609	30
$100,000 to $149,999	103,352	119,282	87
$150,000 to $199,999	169,228	58,420	290
$200,000 to $299,999	257,150	52,821	487
$300,000 to $399,999	85,007	16,962	501
$400,000 to $499,999	38,559	7,573	509
$500,000 to $749,999	31,944	7,633	418
$750,000 to $999,999	9,790	2,608	375
$1,000,000 +	7,575	2,214	342
Total Owner - Occupied Property Values	**752,507**	**484,974**	**155**
Median Property Value	**226,748**	**121,105**	**187**



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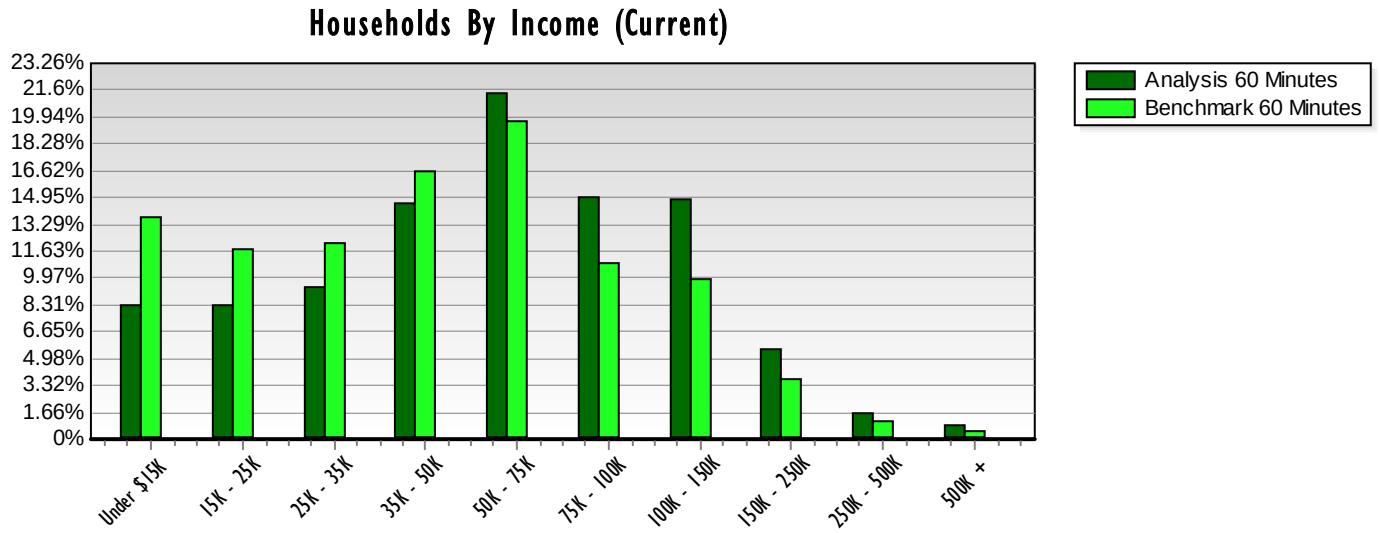
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Households By Income (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Under $15,000	87,029	102,137	85
$15,000 to $24,999	86,289	87,221	99
$25,000 to $34,999	98,898	90,125	110
$35,000 to $49,999	153,173	123,467	124
$50,000 to $74,999	223,797	146,173	153
$75,000 to $99,999	155,968	81,081	192
$100,000 to $149,999	155,736	73,400	212
$150,000 to $249,999	58,826	27,993	210
$250,000 to $499,999	17,321	8,074	215
$500,000 +	8,473	3,251	261
Total Households By Income	**1,045,510**	**742,922**	**141**
Average Household Income	$77,053	$61,329	126
Per Capita Income	$35,327	$27,771	127
Median Household Income	$63,601	$50,020	127



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Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Civilian Labor Force (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Unemployed	55,405	53,893	103
Employed	1,474,240	932,989	158
Total Civilian Labor Force	**1,529,645**	**986,882**	**155**
Unemployment Rate	3.6%	5.5%	66

Population By Education Attained (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Less Than 9th Grade	3.7%	10.0%	37
Some High School, No Diploma	6.6%	10.8%	61
High School Graduate (Includes Equivalency)	26.4%	24.9%	106
Some College, No Degree	24.2%	24.3%	99
Associate Degree	7.4%	6.0%	123
Bachelor's Degree	21.9%	15.3%	143
Master's Degree	6.4%	5.9%	109
Professional School Degree	2.3%	2.0%	118
Doctorate Degree	1.1%	0.8%	135

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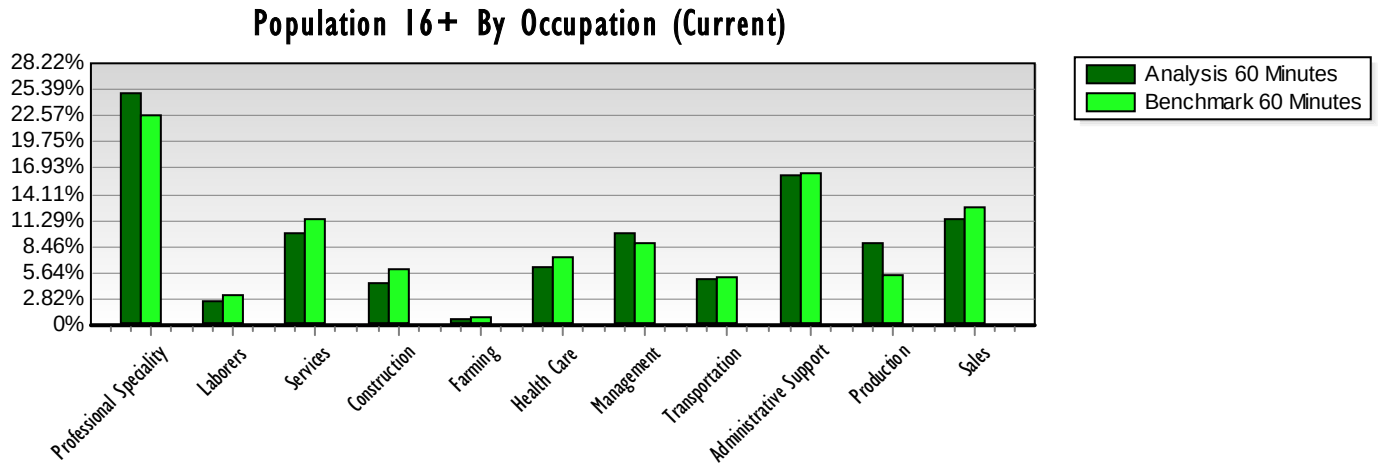
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: San Antonio, TX

Date: 4/9/2009

Population 16+ By Occupation (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Administrative Support	237,976	153,612	155
Architecture and Engineering	35,466	14,806	240
Arts	33,325	15,241	219
Building and Grounds Cleaning	36,815	30,404	121
Business Operations	42,659	22,682	188
Computer and Mathematics	53,745	19,492	276
Construction and Extraction	66,687	56,914	117
Education, Training, Library	79,090	61,293	129
Farming	8,947	7,132	125
Financial Specialists	42,189	20,939	201
Health Care	92,282	68,919	134
Installation	47,621	40,107	119
Legal	17,327	9,290	187
Life and Social Sciences	16,910	6,546	258
Management	145,214	81,812	177
Production	129,123	49,957	258
Sales	168,250	119,163	141
Services	146,963	106,412	138
Transportation	73,651	48,268	153
Total Population 16+ By Occupation	**1,474,240**	**932,989**	**158**



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Benchmark Demographics

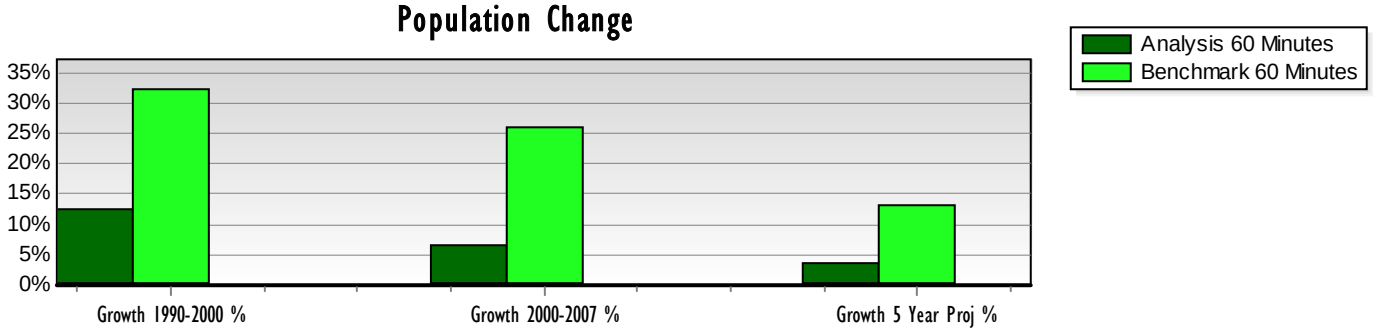
Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Population Profile	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
2012 Projection	2,759,653	3,063,964	90
2007 Estimate	2,661,842	2,710,585	98
2000 Census	2,497,294	2,152,507	116
1990 Census	2,217,956	1,627,716	136

Population Change

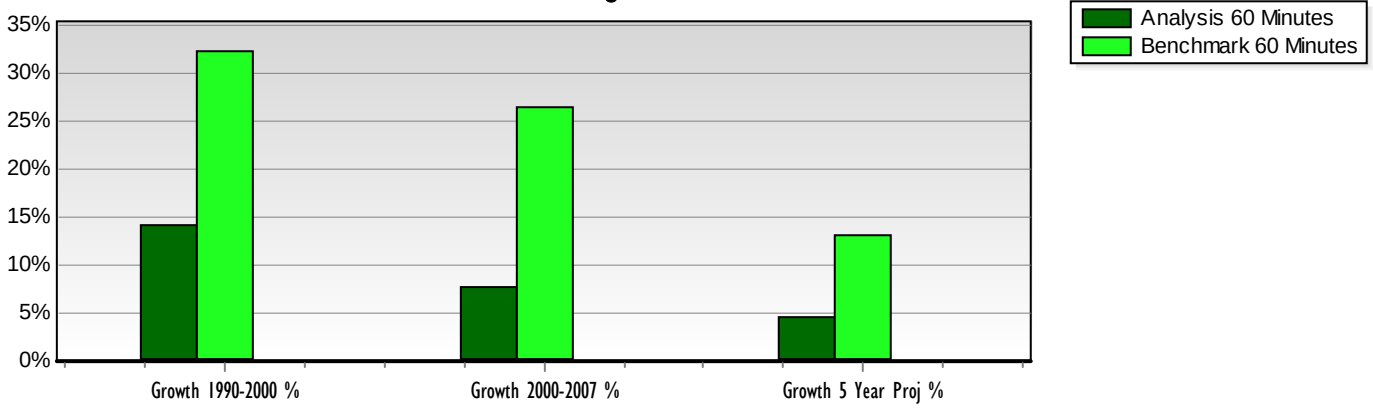


Work Place Population	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Total	1,914,486	1,622,760	118

Household Profile

2012 Projection	1,092,495	1,174,603	93
2007 Estimate	1,045,510	1,038,079	101
2000 Census	970,674	821,244	118
1990 Census	850,619	621,095	137

Household Change



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Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Population By Sex (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Male	49.7%	49.5%	100
Female	50.3%	50.5%	100
Marital Status Persons (Current)			
Single Male	16.2%	13.6%	120
Single Female	13.7%	10.7%	127
Married	55.9%	58.6%	95
Male Previously Married	4.9%	6.0%	81
Female Previously Married	9.2%	11.0%	84
Households by Household Type (Current)			
Family Household	64.2%	68.9%	93
Non-Family Household	35.8%	31.1%	115
Households By Type (Current)			
Single Male	12.8%	10.3%	123
Single Female	16.0%	13.2%	121
Married Couple	51.1%	53.2%	96
Other Family: Male Head of Household	3.6%	4.2%	86
Other Family: Female Head of Household	9.5%	11.6%	82
Non-Family: Male Head of Household	4.0%	4.5%	88
Non-Family: Female Head of Household	3.0%	3.0%	101
Households with Kids (Current)			
Total	359,559	352,258	102
Group Quarters Population by Type (Current)			
College Dormitories	20,310	4,265	476
Correctional Institutions	9,322	23,603	39
Military Quarters	1	1	100
Nursing Homes	19,199	11,573	166
Other Institutions	2,586	3,132	83
Other Noninstitutional	16,032	9,342	172
Total Group Quarters Population	**67,450**	**51,916**	**130**

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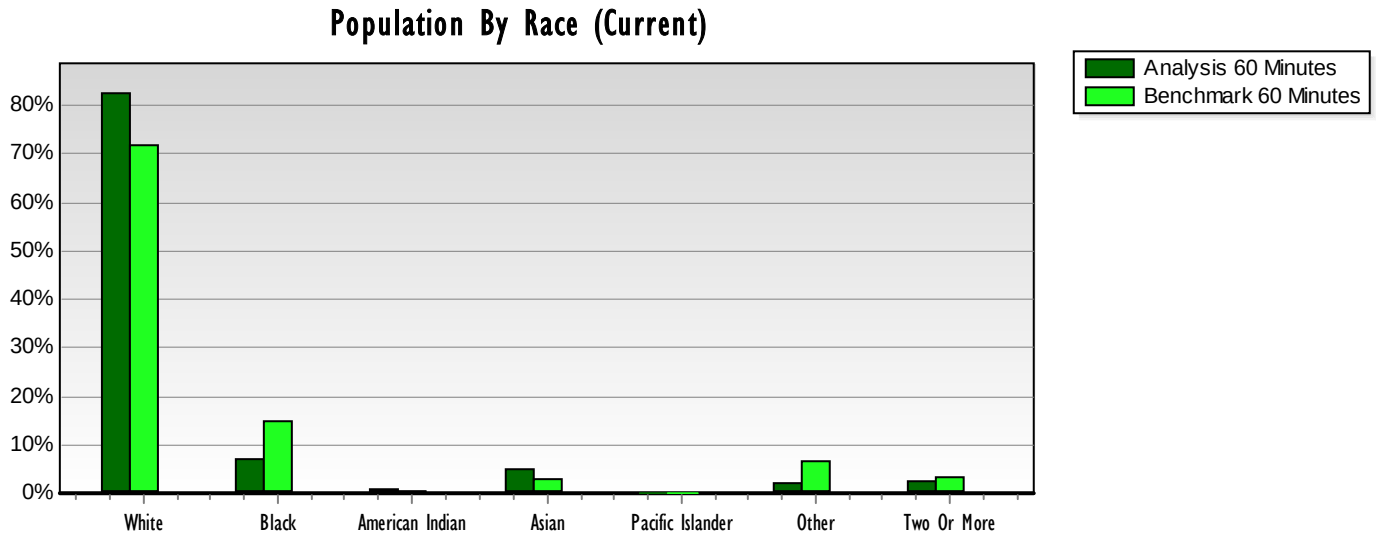
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Population By Race (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
White	2,195,462	1,943,633	113
Black	185,855	399,178	47
American Indian	23,989	10,921	220
Asian	130,974	81,776	160
Pacific Islander	1,459	2,042	71
Other	56,341	184,355	31
Two Or More	67,762	88,680	76
Total Population By Race	**2,661,842**	**2,710,585**	**98**



Population By Hispanic Origin (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Hispanic Origin	124,129	580,952	21
Non Hispanic Origin	2,537,713	2,129,633	119

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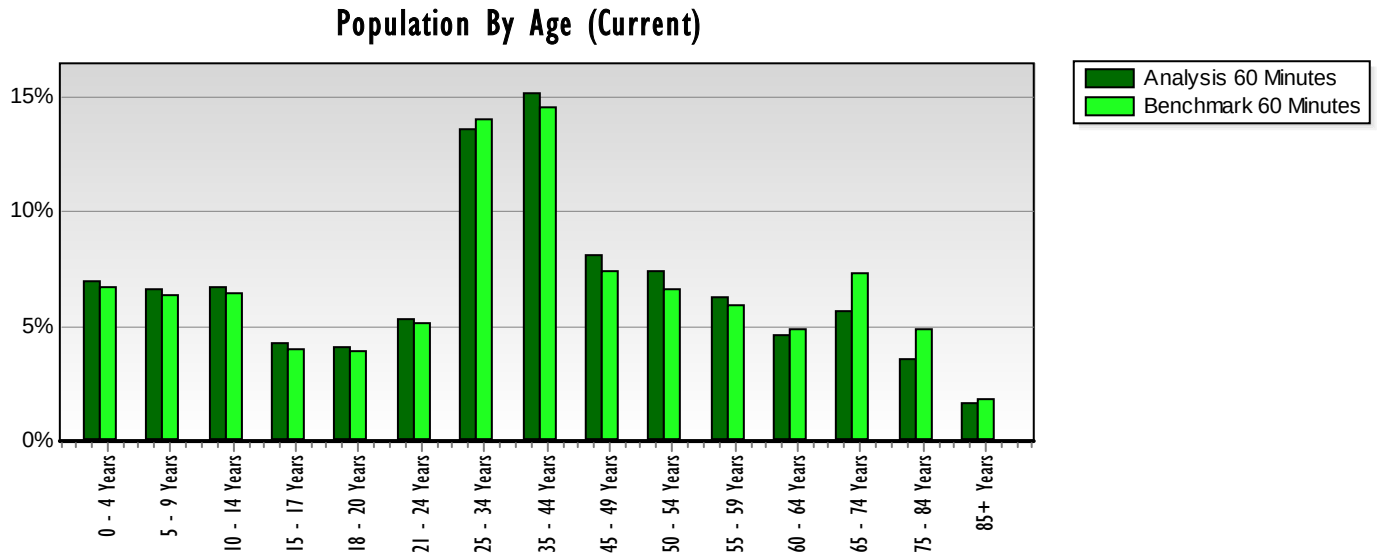
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Population By Age (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
0 to 4 years	185,115	181,859	102
5 to 9 years	177,195	172,466	103
10 to 14 years	178,767	175,112	102
15 to 17 years	113,332	109,142	104
18 to 20 years	109,460	105,343	104
21 to 24 years	141,118	139,175	101
25 to 34 years	360,545	379,997	95
35 to 44 years	403,267	394,730	102
45 to 49 years	216,182	200,330	108
50 to 54 years	196,175	178,664	110
55 to 59 years	167,556	160,194	105
60 to 64 years	122,689	133,013	92
65 to 74 years	151,063	198,630	76
75 to 84 years	94,814	132,329	72
85+ Years	44,564	49,601	90
Total Population By Age	**2,661,842**	**2,710,585**	**98**
Average Age	36.9	38.2	97
Median Age	37.3	38.3	97



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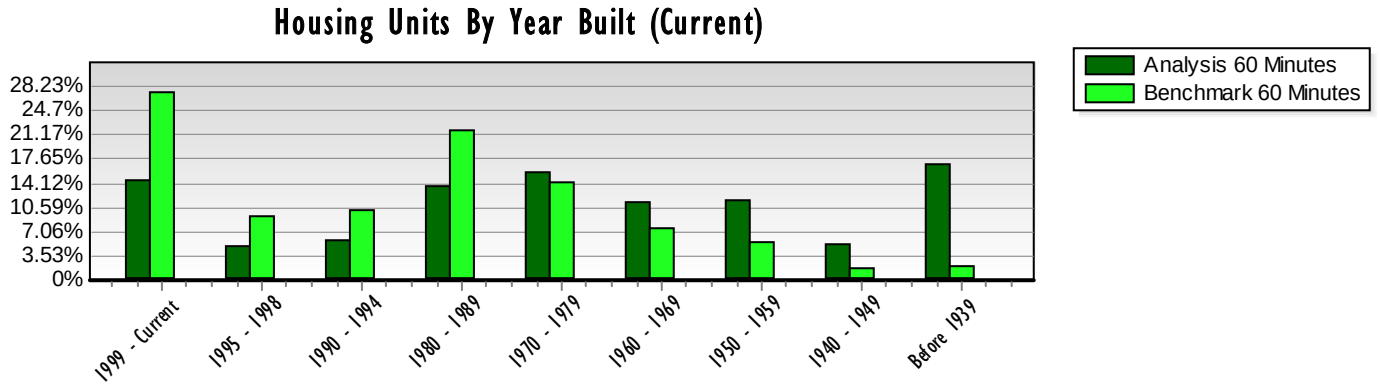
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Housing Units By Year Built (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
1999 to Current	162,214	322,462	50
1995 to 1998	55,902	109,467	51
1990 to 1994	64,207	120,402	53
1980 to 1989	153,389	257,210	60
1970 to 1979	173,217	168,848	103
1960 to 1969	126,884	89,101	142
1950 to 1959	127,863	66,551	192
1940 to 1949	58,487	20,443	286
Before 1939	187,093	22,770	822



Housing Units By Type (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Single-Unit Detached	62.7%	61.3%	102
Single-Unit Attached	6.6%	3.8%	175
Multi-Units 2	3.5%	2.1%	172
Multi-Units 3 - 19	9.7%	13.3%	73
Multi-Units 20 - 49	6.3%	2.5%	250
Multi-Units 50+	8.5%	3.0%	287
Mobile	2.5%	13.4%	18
Other	0.1%	0.7%	13

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*Comparison Index: Average is 100; Less than 100: Red; 100 and Above: Green

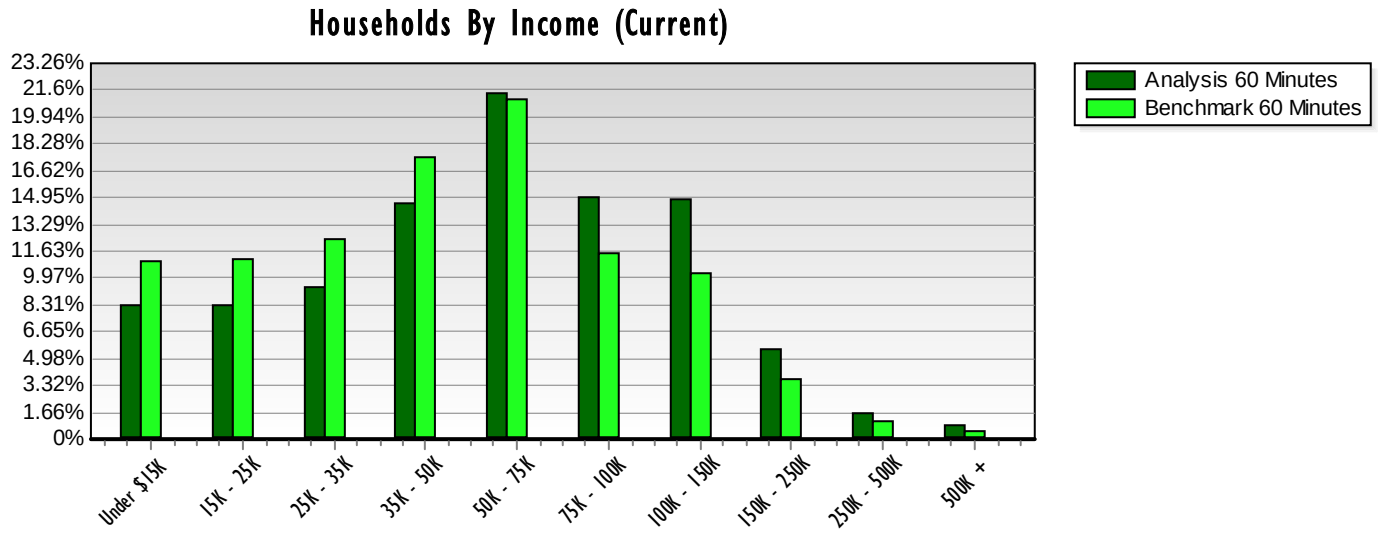
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Households By Income (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Under $15,000	87,029	113,923	76
$15,000 to $24,999	86,289	115,264	75
$25,000 to $34,999	98,898	128,683	77
$35,000 to $49,999	153,173	181,042	85
$50,000 to $74,999	223,797	218,672	102
$75,000 to $99,999	155,968	119,024	131
$100,000 to $149,999	155,736	106,249	147
$150,000 to $249,999	58,826	38,074	155
$250,000 to $499,999	17,321	11,888	146
$500,000 +	8,473	5,260	161
Total Households By Income	**1,045,510**	**1,038,079**	**101**
Average Household Income	$77,053	$63,577	121
Per Capita Income	$35,327	$28,473	124
Median Household Income	$63,601	$51,602	123



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Benchmark Demographics

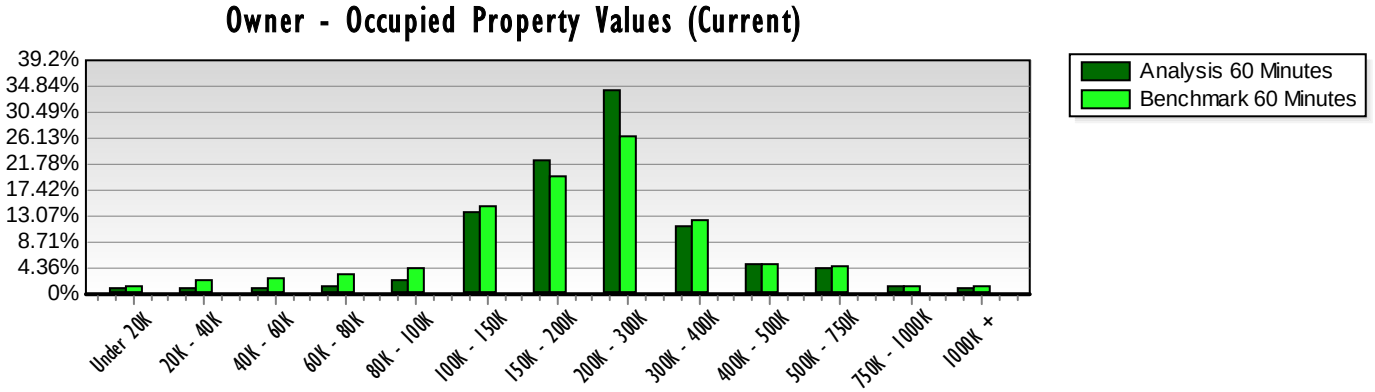
Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Housing Units By Occupancy (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Owner - Occupied	67.8%	62.0%	109
Renter - Occupied	26.4%	26.2%	101
Vacant	5.7%	11.8%	49

Owner - Occupied Property Values (Current)			
Under $20,000	7,474	10,706	70
$20,000 to $39,999	6,824	16,613	41
$40,000 to $59,999	7,087	20,609	34
$60,000 to $79,999	10,458	25,266	41
$80,000 to $99,999	18,059	32,358	56
$100,000 to $149,999	103,352	106,647	97
$150,000 to $199,999	169,228	143,134	118
$200,000 to $299,999	257,150	192,202	134
$300,000 to $399,999	85,007	90,714	94
$400,000 to $499,999	38,559	35,704	108
$500,000 to $749,999	31,944	34,817	92
$750,000 to $999,999	9,790	10,609	92
$1,000,000 +	7,575	10,509	72
Total Owner - Occupied Property Values	**752,507**	**729,888**	**103**
Median Property Value	**226,748**	**220,251**	**103**



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Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Civilian Labor Force (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Unemployed	55,405	61,704	90
Employed	1,474,240	1,287,480	115
Total Civilian Labor Force	**1,529,645**	**1,349,184**	**113**
Unemployment Rate	3.6%	4.6%	79

Population By Education Attained (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Less Than 9th Grade	3.7%	5.5%	66
Some High School, No Diploma	6.6%	13.0%	51
High School Graduate (Includes Equivalency)	26.4%	29.2%	91
Some College, No Degree	24.2%	22.4%	108
Associate Degree	7.4%	7.6%	97
Bachelor's Degree	21.9%	15.5%	142
Master's Degree	6.4%	4.6%	139
Professional School Degree	2.3%	1.6%	142
Doctorate Degree	1.1%	0.6%	175

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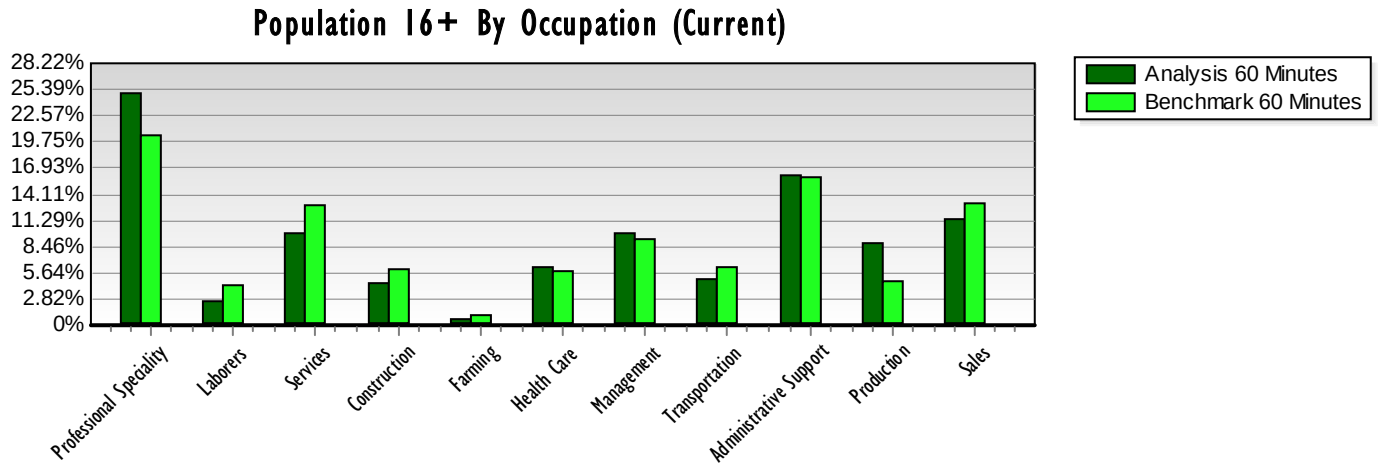
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: Orlando, FL

Date: 4/9/2009

Population 16+ By Occupation (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Administrative Support	237,976	206,500	115
Architecture and Engineering	35,466	26,216	135
Arts	33,325	30,300	110
Building and Grounds Cleaning	36,815	54,631	67
Business Operations	42,659	28,978	147
Computer and Mathematics	53,745	28,072	191
Construction and Extraction	66,687	78,259	85
Education, Training, Library	79,090	56,956	139
Farming	8,947	12,608	71
Financial Specialists	42,189	25,102	168
Health Care	92,282	74,294	124
Installation	47,621	49,867	95
Legal	17,327	11,899	146
Life and Social Sciences	16,910	6,464	262
Management	145,214	120,266	121
Production	129,123	61,005	212
Sales	168,250	170,290	99
Services	146,963	165,758	89
Transportation	73,651	80,015	92
Total Population 16+ By Occupation	**1,474,240**	**1,287,480**	**115**



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Benchmark Demographics

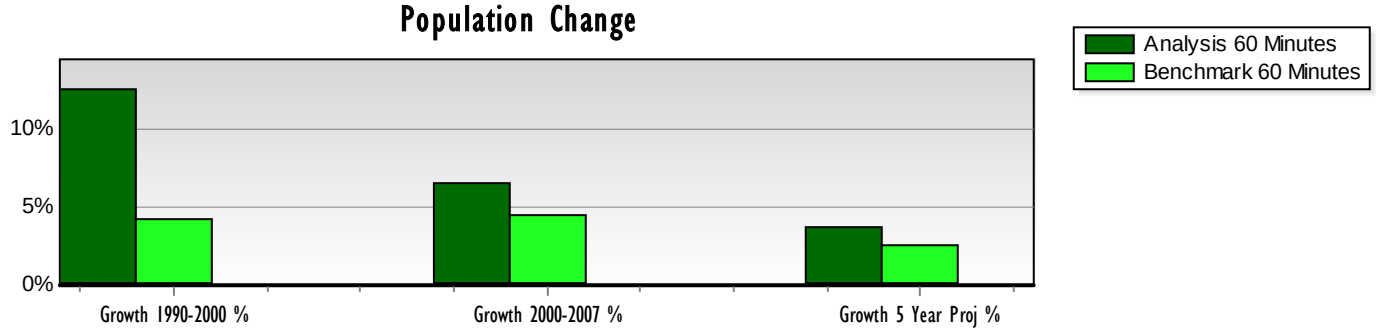
Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Population Profile	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
2012 Projection	2,759,653	2,651,647	104
2007 Estimate	2,661,842	2,586,375	103
2000 Census	2,497,294	2,475,144	101
1990 Census	2,217,956	2,375,429	93

Population Change

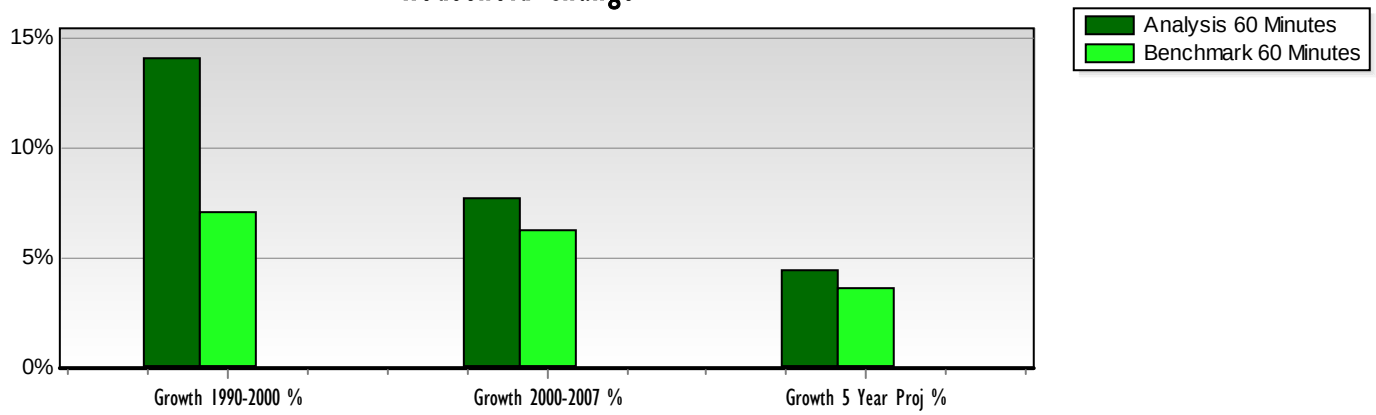


Work Place Population	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Total	1,914,486	1,591,051	120

Household Profile

2012 Projection	1,092,495	1,065,100	103
2007 Estimate	1,045,510	1,027,431	102
2000 Census	970,674	967,055	100
1990 Census	850,619	902,579	94

Household Change



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Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Population By Sex (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Male	49.7%	48.2%	103
Female	50.3%	51.8%	97
Marital Status Persons (Current)			
Single Male	16.2%	14.0%	116
Single Female	13.7%	12.9%	106
Married	55.9%	56.0%	100
Male Previously Married	4.9%	5.6%	88
Female Previously Married	9.2%	11.5%	80
Households by Household Type (Current)			
Family Household	64.2%	67.4%	95
Non-Family Household	35.8%	32.6%	110
Households By Type (Current)			
Single Male	12.8%	12.1%	105
Single Female	16.0%	16.5%	97
Married Couple	51.1%	50.5%	101
Other Family: Male Head of Household	3.6%	3.8%	96
Other Family: Female Head of Household	9.5%	13.2%	72
Non-Family: Male Head of Household	4.0%	2.3%	172
Non-Family: Female Head of Household	3.0%	1.7%	179
Households with Kids (Current)			
Total	359,559	365,733	98
Group Quarters Population by Type (Current)			
College Dormitories	20,310	12,285	165
Correctional Institutions	9,322	5,320	175
Military Quarters	1	7	14
Nursing Homes	19,199	19,932	96
Other Institutions	2,586	2,367	109
Other Noninstitutional	16,032	8,635	186
Total Group Quarters Population	**67,450**	**48,546**	**139**

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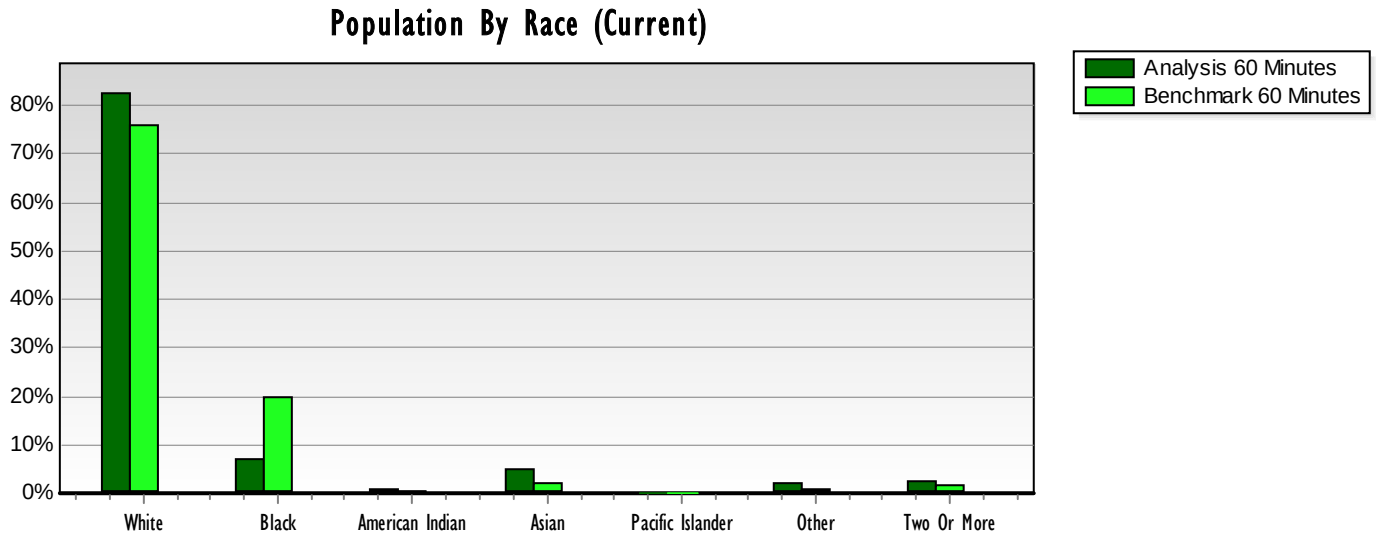
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Population By Race (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
White	2,195,462	1,961,609	112
Black	185,855	508,333	37
American Indian	23,989	6,867	349
Asian	130,974	51,106	256
Pacific Islander	1,459	1,242	117
Other	56,341	17,110	329
Two Or More	67,762	40,108	169
Total Population By Race	**2,661,842**	**2,586,375**	**103**



Population By Hispanic Origin (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Hispanic Origin	124,129	54,073	230
Non Hispanic Origin	2,537,713	2,532,302	100

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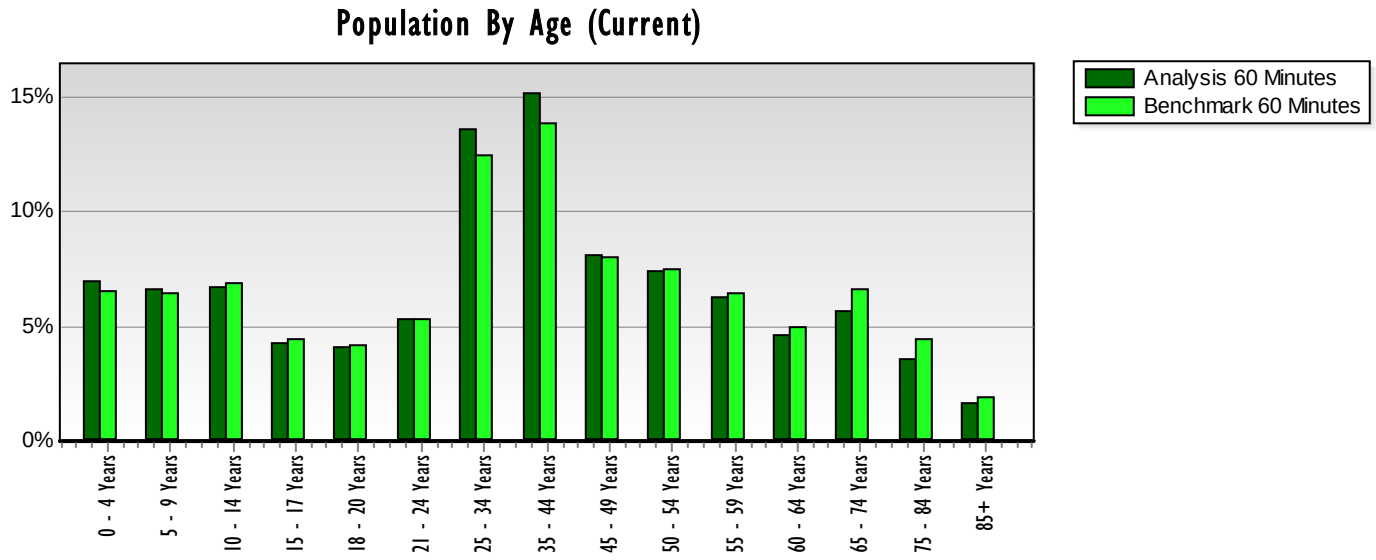
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Population By Age (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
0 to 4 years	185,115	168,807	110
5 to 9 years	177,195	167,396	106
10 to 14 years	178,767	178,065	100
15 to 17 years	113,332	115,634	98
18 to 20 years	109,460	107,005	102
21 to 24 years	141,118	138,424	102
25 to 34 years	360,545	322,521	112
35 to 44 years	403,267	359,094	112
45 to 49 years	216,182	206,999	104
50 to 54 years	196,175	193,000	102
55 to 59 years	167,556	167,107	100
60 to 64 years	122,689	127,716	96
65 to 74 years	151,063	171,000	88
75 to 84 years	94,814	114,881	83
85+ Years	44,564	48,726	91
Total Population By Age	**2,661,842**	**2,586,375**	**103**
Average Age	36.9	37.9	97
Median Age	37.3	38.2	98



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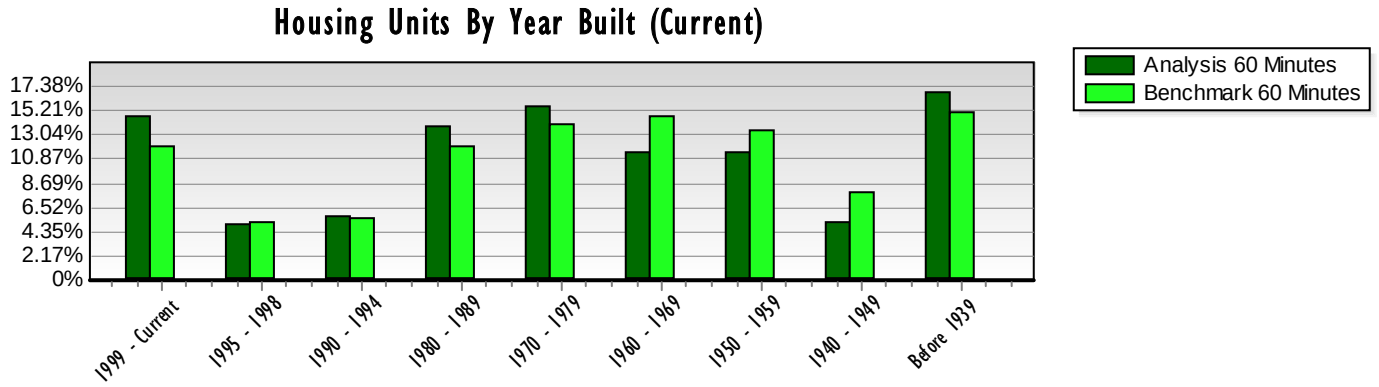
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Housing Units By Year Built (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
1999 to Current	162,214	135,013	120
1995 to 1998	55,902	57,370	97
1990 to 1994	64,207	62,171	103
1980 to 1989	153,389	135,314	113
1970 to 1979	173,217	156,104	111
1960 to 1969	126,884	164,350	77
1950 to 1959	127,863	151,564	84
1940 to 1949	58,487	87,855	67
Before 1939	187,093	169,696	110



Housing Units By Type (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Single-Unit Detached	62.7%	68.1%	92
Single-Unit Attached	6.6%	3.3%	203
Multi-Units 2	3.5%	4.7%	76
Multi-Units 3 - 19	9.7%	14.7%	66
Multi-Units 20 - 49	6.3%	1.9%	325
Multi-Units 50+	8.5%	3.0%	281
Mobile	2.5%	4.2%	58
Other	0.1%	0.1%	153

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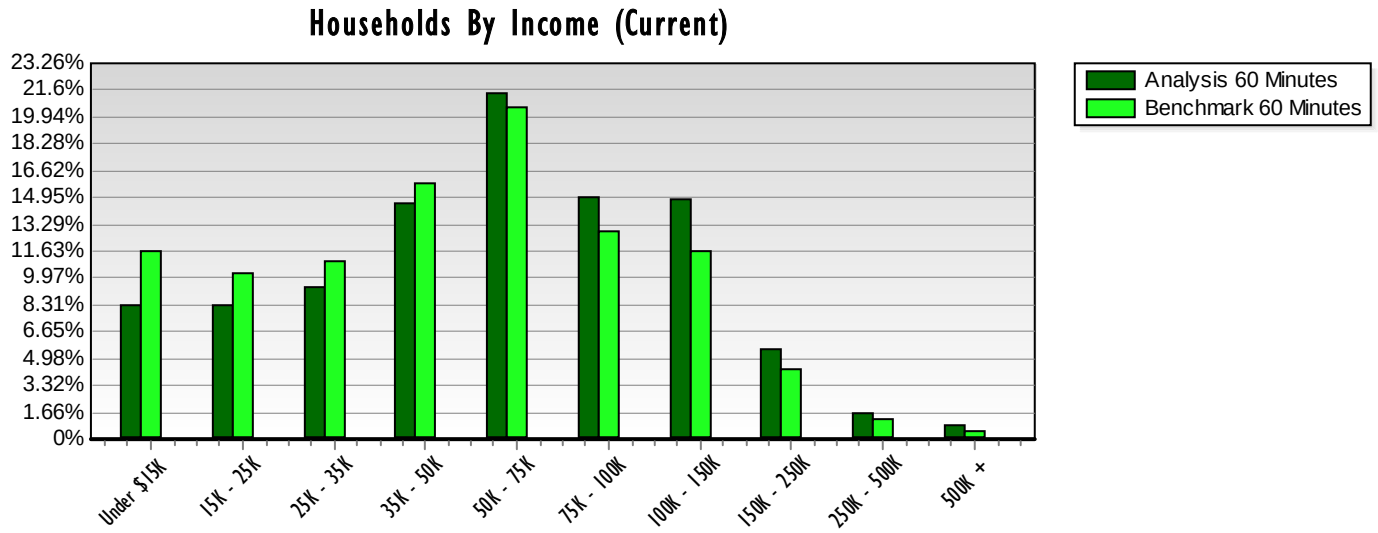
Benchmark Demographics

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Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Households By Income (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
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$15,000 to $24,999	86,289	105,644	82
$25,000 to $34,999	98,898	113,410	87
$35,000 to $49,999	153,173	162,561	94
$50,000 to $74,999	223,797	210,946	106
$75,000 to $99,999	155,968	132,364	118
$100,000 to $149,999	155,736	120,100	130
$150,000 to $249,999	58,826	44,652	132
$250,000 to $499,999	17,321	12,288	141
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Total Households By Income	**1,045,510**	**1,027,431**	**102**
Average Household Income	$77,053	$66,791	115
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Median Household Income	$63,601	$55,264	115



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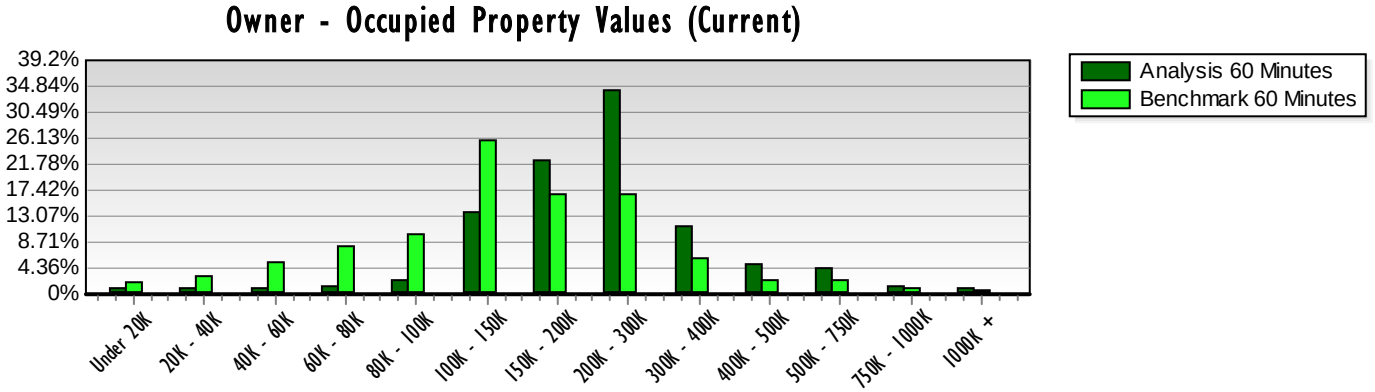
Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Housing Units By Occupancy (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Owner - Occupied	67.8%	65.9%	103
Renter - Occupied	26.4%	25.8%	102
Vacant	5.7%	8.2%	70

Owner - Occupied Property Values (Current)

Under $20,000	7,474	15,058	50
$20,000 to $39,999	6,824	21,756	31
$40,000 to $59,999	7,087	39,147	18
$60,000 to $79,999	10,458	59,255	18
$80,000 to $99,999	18,059	74,884	24
$100,000 to $149,999	103,352	190,594	54
$150,000 to $199,999	169,228	123,011	138
$200,000 to $299,999	257,150	124,380	207
$300,000 to $399,999	85,007	43,746	194
$400,000 to $499,999	38,559	17,726	218
$500,000 to $749,999	31,944	18,302	175
$750,000 to $999,999	9,790	6,366	154
$1,000,000 +	7,575	4,016	189
Total Owner - Occupied Property Values	**752,507**	**738,241**	**102**
Median Property Value	**226,748**	**158,029**	**143**



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Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Civilian Labor Force (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Unemployed	55,405	73,050	76
Employed	1,474,240	1,289,468	114
Total Civilian Labor Force	**1,529,645**	**1,362,518**	**112**
Unemployment Rate	3.6%	5.4%	68

Population By Education Attained (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Less Than 9th Grade	3.7%	5.5%	67
Some High School, No Diploma	6.6%	10.7%	61
High School Graduate (Includes Equivalency)	26.4%	28.7%	92
Some College, No Degree	24.2%	23.3%	104
Associate Degree	7.4%	6.1%	121
Bachelor's Degree	21.9%	16.4%	133
Master's Degree	6.4%	6.6%	98
Professional School Degree	2.3%	1.9%	123
Doctorate Degree	1.1%	0.9%	125

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*Comparison Index: Average is 100; Less than 100: Red; 100 and Above: Green

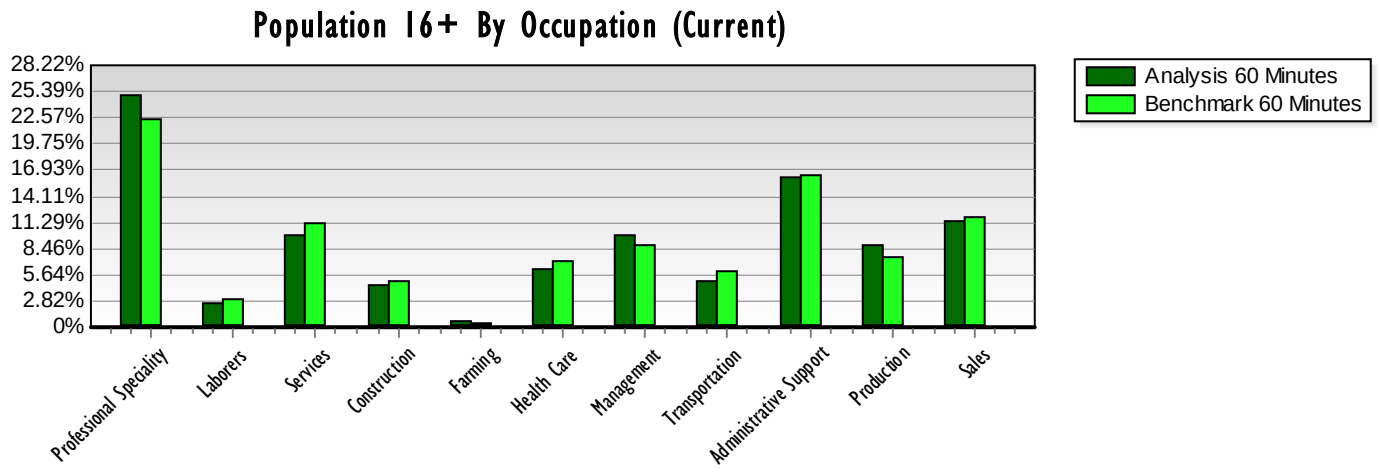
Benchmark Demographics

Analysis Geography: State Hwy 47 & 167th Ave, Ramsey, MN

Benchmark Geography: St. Charles, MO

Date: 4/9/2009

Population 16+ By Occupation (Current)	Analysis 60 Minutes	Benchmark 60 Minutes	Comparison Index*
Administrative Support	237,976	211,461	113
Architecture and Engineering	35,466	27,030	131
Arts	33,325	21,285	157
Building and Grounds Cleaning	36,815	38,571	95
Business Operations	42,659	29,078	147
Computer and Mathematics	53,745	37,365	144
Construction and Extraction	66,687	65,187	102
Education, Training, Library	79,090	70,481	112
Farming	8,947	5,884	152
Financial Specialists	42,189	32,111	131
Health Care	92,282	91,657	101
Installation	47,621	48,068	99
Legal	17,327	12,767	136
Life and Social Sciences	16,910	11,997	141
Management	145,214	115,000	126
Production	129,123	97,490	132
Sales	168,250	153,025	110
Services	146,963	144,041	102
Transportation	73,651	76,970	96
Total Population 16+ By Occupation	**1,474,240**	**1,289,468**	**114**



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