

Retail Sales Analysis & Report for Kossuth County, Iowa Fiscal Year 2007



IOWA STATE UNIVERSITY
University Extension



The U.S. Department of Agriculture (USDA) prohibits discrimination in all its programs and activities on the basis of race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital or family status. (Not all prohibited bases apply to all programs.) Many materials can be made available in alternative formats for ADA clients. To file a complaint of discrimination, write USDA, Office of Civil Rights, Room 326-W, Whitten Building, 14th and Independence Avenue, SW, Washington, DC 20250-9410 or call 202-720-5964. Issued in furtherance of Cooperative Extension work, Acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture. Jack M. Payne, director, Cooperative Extension Service, Iowa State University of Science and Technology, Ames, Iowa.

Table of Contents



Introduction		1
Overview		
	Data sources	2
	Definitions	3-4
	Methodology & qualifications	5
	Peer group index	6-7
	State map by peer group	8
County Snapshot		
	Retail	9
	Demographics	10
	Economic	11-13
County Reports		
	Total Sales	14
	Sales Indicators	15
	Sales Performance	16
	Neighboring County Comparison	17
	E-commerce & Internet Sales	18
	Merchandise Category Sales	19
Appendix		
	County pull factors, 2000-2007	20-21
	County pull factor ranking	22
	County per capita sales ranking	23
	Change in real sales ranking 2000-2007	24
Acknowledgements and author info		25

INTRODUCTION

Retail sales matter to the health of a community in terms of the quality of life of its residents and in its contribution to overall economic health. Nationally, retailing accounts for approximately 8.3% of the gross domestic product and is the second largest sector in the U.S. in number of businesses and number of employees. For local governments, retail sales provide an important tax base to advance provision of services to its citizens. Communities realize that having a strong retail sector is a major component in economic growth and stability and for this reason, the Iowa State University Retail Trade Analysis Program is an important source for data and reporting. This report is one source for deepening a community's understanding of its retail strengths and weaknesses, providing information on the past to enhance decision making for the future.

In general, real taxable retail sales in Iowa have declined by 2.7% since 2000 and real per capita sales have declined by 6%. While nominal sales have increased nearly 15% in the same time period, the inflation effect is substantial explaining the nearly 18% differential in these retail sales measures. This is not unique to Iowa however, with the national pattern of retail sales exhibiting similar declines in real terms. It is important to note that these are **taxable sales** and not total retail sales. Because much of consumer spending is in tax exempt areas such as energy and food, these retail measures do not indicate the total level of consumer spending but provide a good first approximation. Despite the fact that Iowa experienced a decline in real retail sales, some counties experienced substantial gains in the same time period. Dallas County reaped the benefits of the Jordan Creek Town Center demonstrating a real retail sales increase of nearly 225% since 2000. Other counties with strong increases were Ringgold, Palo Alto, Jasper, Johnson and Clinton. Only 27 of Iowa's 99 counties exhibited an increase in real retail sales, and 67 of Iowa's counties had real retail sales declines greater than the state average. While Polk County leads Iowa with real per capita sales of more than \$15,000 it experienced a decline in overall real sales of nearly 11% between 2000 and 2007. Real sales per capita ranged from the lowest of \$2,582 in Louisa County to Polk County's \$15,832. Only 16 counties had per capita sales in 2007 greater than the state average of \$10,612. Retail sales measures in this report demonstrate a widening gap between the strongest and weakest counties over time.

The measure communities and counties often focus on is the pull factor, which measures the efficacy of the subject trade area in retaining its own retail dollars and servicing its residents. In general, a pull factor greater than one indicates that a community is drawing retail trade from more than its population, and a pull factor of less than one would indicate that it is not capturing all of its population's retail demand. Pull factors in Iowa ranged from the low value of .27 for Louisa County to Clay County's 1.5. Only 19 counties in Iowa had a pull factor greater than one and were typically more populated counties with a strong trade center.

DATA SOURCES & NOTES

Retail Data and Time Period:

The retail sales data presented here are obtained in the *Iowa Retail Sales and Use Tax Report* generated by the Iowa Department of Revenue. The Department of Revenue compiles data from quarterly state sales tax returns, and reports data for all localities with at least 10 businesses holding sales tax permits. The number of firms is annualized from this data based on the quarterly numbers, and firms are classified based on their Standard Industrial Classification (S.I.C.) codes. The data are collected primarily for statewide fiscal management purposes and due to the administrative nature of sales tax reporting and accounting, may exhibit occasional anomalies for analysis at the local level. For cities with population over 2,500 the report also details sales by broad merchandise categories such as building materials, food, apparel, etc. County level data are presented by selected merchandise categories and in the aggregate.

The sales data are based on goods and services subject to the retail sales tax, with some notable categories being exempt. Food and drug sales have been exempt since 1974, however an approximation for these sales has been added to this report annually, ranging from 15-18%. Other notable exemptions include seed, fertilizer, new and used automobiles, professional services, and farm machinery and equipment. While exempt from retail sales tax, some categories are subject to a use tax however these data are not included in this report. The state has also phased out taxes on sales of metered gas, electricity, and fuel used as energy in residential structures. Due to these exemptions, the sales reported herein understate total retail sales activity throughout the state regardless of the locality reported. The Utility Effect refers to the exaggeration of retail sales due to the presence of utility providers in some counties. In a few sparsely populated counties there may be a Rural Electric Cooperative providing services to multiple counties but reporting all the sales in the county of their operating base. If operations are moved or the firm relocates this can account for large and abrupt fluctuations in the level of reported retail sales.

All the sales data shown here are reported by fiscal year, corresponding to the Iowa Department of Revenue's fiscal year beginning April 1 and ending March 31. For clarification, fiscal year 2007 actually commences on April 1, 2006 and ends on March 31, 2007. It should be noted that these fiscal years differ from the State's budgeting fiscal years which begin on July 1 and end on June 30.

Other Data Sources:

The U.S. Census Bureau Population Estimates Program provides base population data used in this report. Adjusting retail sales for trends in inflation in this report requires the use of the Implicit Price Deflator for Personal Consumption Expenditures derived by the U.S. Bureau of Economic Analysis. Both the Census Bureaus and the BEA provide income data at the county and city level that are used in the adjustment to the pull factor, as well as employment figures and the average wages per job. Additional terminology, data guidance and classifications was obtained from the U.S. Department of Agriculture's Economic Research Service. More information about the data can be found on each departments respective website:

www.bea.gov
www.census.gov
www.ers.usda.gov

This report is a publication of ReCAP, a coordinating agency in the State Data Center of Iowa network, and much of the information and data used in this report are compiled and published on our website as well. Along with information that can be used to increase understanding and interpretation of this report, the site also contains additional retail analysis for decision makers. Our website can be found at www.recap.iastate.edu.

DEFINITIONS

Commuting Flow Ratio: The commuting flow ratio indicates how many people enter the subject place for work relative to how many leave for work. For example, Polk County has a Commuting Flow Ratio of 4. This means that for every resident that leaves during the day, Polk county receives 4 workers from other counties. Commuting flows affect the buying patterns of consumers and help explain differences in county and city pull factors.

Income Index: The income index is a ranking or comparative tool to determine how personal income in a subject community or area compares with a comparison region. It is calculated by dividing local per capita income by the per capita average income of the comparison region. Typically, this is expressed as a percentage of the statewide average such that an income index of 120 or 1.2 would mean that the subject community's income level is 20% greater than the state average.

Peer Group: The peer group construct is a comparative tool that allows us to compare towns and counties without ignoring important differences in demographics, degrees of rurality, and other factors that make areas unique. Simply put, peer groups allow us to compare apples with apples and recognize that it makes more sense to compare a green apple with a red apple than it does to an orange. With respect to towns and counties, the peer group approach allows certain common characteristics to determine which areas are best suited for comparison for a subject area. The use of peer groups in the reports was broadened beginning in 2006, and this approach is utilized more extensively in this version. More information on how the peer groups are chosen can be found in the methodology section.

Per Capita Sales: Per Capita ("per person") sales are calculated by dividing the dollar value of sales by the population estimate for the subject place. This measure allows for comparisons temporally and spatially, and provides a standardized benchmark. As the U.S. Census Bureau revises the population base estimates for prior years, the numbers may not always reconcile with those in prior year reports. In most cases, the discrepancies are minor.

Per Capita Sales Index: Prior to the 2006 reports, this was referred to as the "**Pull Factor**" and was developed by Iowa State University Extension Service to provide a standard for retail sales performance in a locality. It is calculated by dividing the per capita dollar sales of the subject place by the per capita sales for the entire state. For example if a city's per capita sales were \$18,000 per year and the state per capita sales were \$9,000 per year, the per capita sales index is 2. Expressed as a percentage, the city's per capita sales are 200% of the statewide average. When the per capita sales index is greater than one it indicates that the subject area is performing more strongly than the state average and over time, changes in this index can indicate whether an area's retail sector is progressing or regressing.

Potential Sales: In previous reports this was only calculated at the county level with expected sales being calculated at the local level. Potential sales are now calculated for counties and cities uniformly, providing a benchmark for the sales level expected if the subject area had no surplus or leakage. As an estimate of local demand, it provides the starting point for calculating the surplus or leakage a community is experiencing. It is calculated as follows:

$$[\text{City or County Population}] \times [\text{State Per Capita Sales}] \times [\text{Income Index}]$$

Iowa State University Retail Trade Analysis Program

Pull Factor Ratio: The pull factor ratio is derived by dividing the **Trade Area Capture Estimate** by the subject community's population. For example, if the TACE is 150 and the population is 100, the pull factor ratio is 1.5. Expressed as a percentage in this case of 150%, the interpretation is that the subject community is selling to 150% of its population in consumer equivalents. For a community this means they are capturing trade or consumers from outside their local population.

Sales Capacity: In previous reports this measure was referred to as **expected** sales, and was not calculated for counties. Sales capacity serves as a retail performance benchmark that indicates the expected level of retail sales we would expect to find in a city or county. This benchmark incorporates population and income characteristics, as well as a measure of strength based on comparable communities (through the Peer Group Pull Factor). Comparing sales capacity with actual sales for a community indicates how well it is performing in relation to its unique potential. The actual value is calculated as follows:

[City or County Population] X [State Per Capita Sales] X [Peer Group Pull Factor] X [Income Index]

Sales Variance and Surplus/Leakage: The difference between actual and potential sales for a subject community is referred to as the sales variance. When the sales variance is positive, meaning actual sales are greater than expected sales, the community is experiencing **Surplus**. Conversely, when expected sales are greater than actual sales the community is experiencing **Leakage**. These variances and surplus or leakage data can be expressed in dollars, percentages, or consumer equivalents. These benchmarks allow a community or region to analyze its comparative advantages and disadvantages.

Trade Area Capture Estimate: Trade area capture provides an estimate of the number of customers drawn to shop in the subject community. Trade area capture is calculated by dividing the annual total sales by the estimated average dollar sales per customer. The estimated sales per customer is estimated by adjusting statewide average sales per capita to reflect the income level, or purchasing power, in the community's trade region.

University Effect: Retail trade patterns in counties with large universities or colleges may appear weaker than expected given the range of sporting, entertainment, and cultural events associated with those institutions. Although college students are counted among the county's population, their income levels and spending patterns are less easily measured and may lead to some misinterpretation of the data. This effect can also be seen to some degree in the pull factor ratio, where the lower incomes of college students can make the subject community look as though it is performing better than another community when some of that difference may be attributable to under representing of income in the pull factor ratio.

Urbanization: Refers to the concentration of population into towns and cities and can be viewed as a continuum ranging from rural areas to urban or metropolitan areas. The level of urbanization has a large impact on the retail services available and the patterns of retail trade.

Utility Effect: Refers to the exaggeration of retail sales data for counties which have a utility provider and also the large and abrupt changes to retail sales data for an area if these utility companies change billing operations or locations. Additionally, due to the sales tax on utilities being phased out over a five year period beginning in 2006, sales data for these counties will experience volatility.

METHODOLOGY

Changes from Prior Years: While the general content of the Retail Trade Reports has been relatively consistent over the years, there have been some important changes. This means that reports beginning in 2006 are not directly comparable to prior reports, although the data for previous years has been updated in the 2006 and 2007 reports. One of the major changes in the 2006 report was the inclusion of income characteristics in the calculation of the pull factor and with that change the old pull factor was renamed the “per capita sales index”. The pull factor definition for this 2007 report continues with the changes implemented in 2006 and more information on these calculations and terminology can be found in the definition section. One of the major changes in this years report is the expansion of the use of peer groups in the retail trade analysis, particularly at the county level. The derivation of county peer groups was developed in the recently published report, *Iowa Retail & Service Business Threshold Analysis: A comparative look at Iowa’s Counties*, and is utilized again here. Along with this change in methodology, some of the terminology has changed for more consistency. In prior reports expected sales were calculated differently from potential sales for cities and counties. To increase continuity and make the reports more user-friendly, there is no longer a distinction in how potential sales are calculated for a locality. Potential sales are reported for individual towns as well as counties and provide the standard for quantifying the amount of surplus or leakage the subject area is experiencing. Sales capacity or expected sales is intended to be used in tandem with potential sales to assess how much leakage or surplus may be *corrected* in the community. This years’ report also has a slightly different format, new content, and more data relevant for decision makers.

City Peer Groups: The cities were organized into peer groups based on population, degree of urbanization of their subject county, and adjacency to metropolitan areas. There are 21 groups of cities overall from the least urbanized representing towns with populations of 500 or fewer in non-metropolitan counties to the most urbanized representing towns with populations greater than 50,000 located in metropolitan counties.

County Peer Groups: Organizing the counties into peer groups was a multi-step process. First using the RUCC, or rural urban continuum codes which classify the counties by population and proximity to metro areas. The second step was to adjust these codes for differences in income levels, commuting patterns, and population size based on Iowa’s unique distribution. Finally, counties were evaluated by the size of their trade centers and grouped accordingly. Two counties found in group B, Iowa and Dickinson County, would not have been placed in that group under the basic RUCC guidelines but due to the tourist draw of Dickinson County and the Williamsburg outlets in Iowa County, they act as much larger trade centers than their population would suggest. It is recognized that there is no perfect manner in which to organize Iowa’s counties, however this grouping provides a good first approximation.

Geographic Competition Groups: Unlike the peer group construct, the geographic competition grouping is a means of measuring the impacts of **neighboring towns or counties** on retail sales for a subject location. While the peer group analysis tells decision makers how they are doing relative to similar towns and counties, the geographic competition information indicates how the subject area is performing relative to those located closest. This does not take into account population or urbanization, and is particularly useful when concerns are focused on leakage of retail trade dollars. In areas where a large trade center or a growing suburb is in existence, these benchmarks can help decision makers see how large the impacts are for their retail environment.

Inflation Concerns: The sales data in this report are obtained from the Iowa Department of Revenue and reports sales without adjusting for inflation, in other words they are the actual level of sales in dollars. The actual dollar value of sales published is reported here as **Nominal Dollar Sales**, in reports prior to 2005 these figures were referred to as current dollar sales. **Real Dollar Sales** are the nominal dollar sales adjusted for inflation using the Implicit Price Deflator (IPD) for Personal Consumption Expenditures published by the BEA. In previous reports sales were deflated using the CPI, however the IPD serves as a better measure as it focuses on the average increase in prices for all consumption and accounts for changes in consumer tastes.

COUNTY PEER GROUP DETAIL

GROUP A: 10 COUNTIES

Total Population this group: 1,421,092

Blackhawk	Polk
Dallas	Pottawattamie
Dubuque	Scott
Johnson	Story
Linn	Woodbury

Median number of employees per retail establishment (employer firms): 16.33

Median per capita income: \$33,279

Average population growth 2000-2005: 3.87%

Median county population: 109,856

Median daytime population change: 4.2%

Average % of population 25 and older with at least college degree: 27.94%

GROUP B: 24 COUNTIES

Total Population this group: 694,928

Benton	Grundy	Marion
Boone	Harrison	Marshall
Bremer	Iowa	Mills
Buena Vista	Jasper	Muscatine
Cerro Gordo	Jones	Wapello
Clinton	Lee	Warren
Des Moines	Madison	Washington
Dickinson	Mahaska	Webster

Median number of employees per retail establishment (employer firms): 11.27

Median per capita income: \$29,863

Average population growth 2000-2005: .91%

Median county population: 26,720

Median daytime population change: -3.8%

Iowa State University Retail Trade Analysis Program

GROUP C: 45 COUNTIES

Total Population this group: 668,041

Allamakee	Clay	Hamilton	Lucas	Plymouth
Appanoose	Crawford	Hancock	Mitchell	Poweshiek
Buchanan	Delaware	Hardin	Monona	Shelby
Carroll	Emmet	Henry	Monroe	Sioux
Cass	Fayette	Howard	Montgomery	Tama
Cedar	Floyd	Humboldt	O'Brien	Union
Cherokee	Franklin	Jackson	Osceola	Winnebago
Chickasaw	Greene	Jefferson	Page	Winneshiek
Clarke	Guthrie	Kossuth	Palo Alto	Wright

Median number of employees per retail establishment (employer firms): 9.37

Median per capita income: \$28,407

Average population growth 2000-2005: -2.24%

Median county population: 14,161

Median daytime population change: -4.3%

Average % of population 25 and older with at least college degree: 15.07%

GROUP D: 20 COUNTIES

Total Population this group: 181,463

Adair	Davis	Lyon	Wayne
Adams	Decatur	Pocahontas	Worth
Audubon	Fremont	Ringgold	
Butler	Ida	Sac	
Calhoun	Keokuk	Taylor	
Clayton	Louisa	Van Buren	

Median number of employees per retail establishment (employer firms): 7.28

Median per capita income: \$26,982

Average population growth 2000-2005: -3.89%

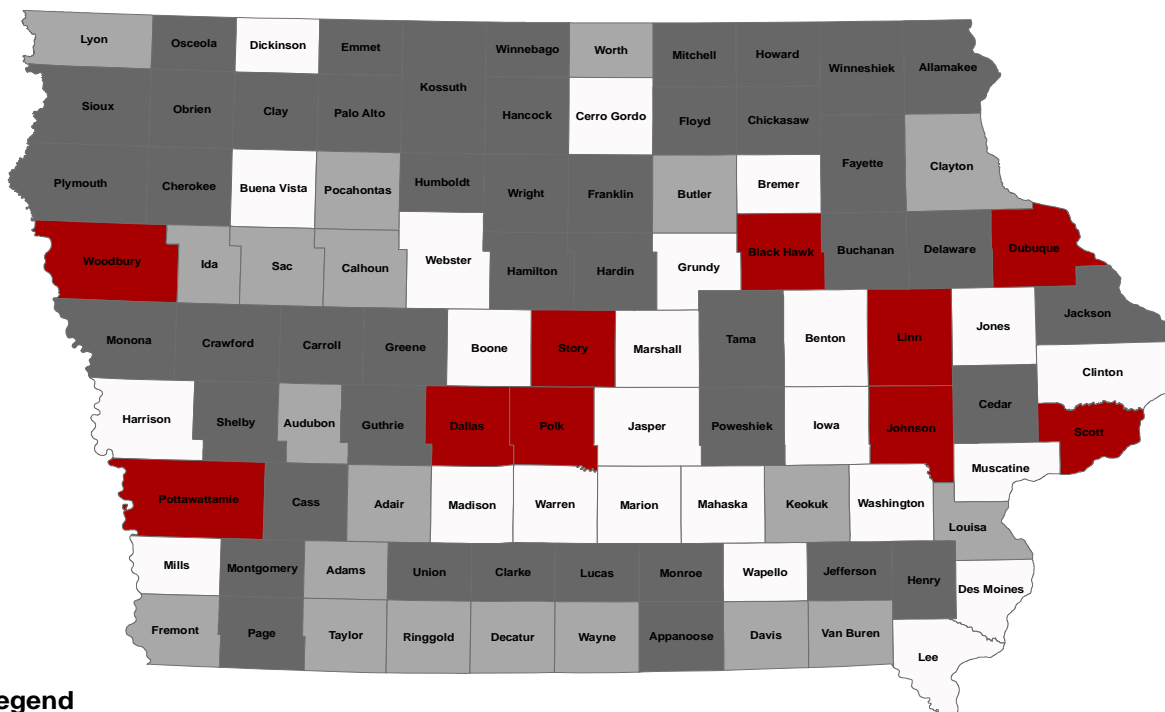
Median county population: 7,863

Median daytime population change: -9.4%

Average % of population 25 and older with at least college degree: 12.97%

Map of Iowa's 99 Counties Coded by Trade Classification

The classification system below was derived using RUCC's from the Census Bureau which measure the extent to which a county is urban or rural. In addition, it takes into account what size of retail trade center the county has and the county's overall proximity to metropolitan areas and larger trade centers.



Legend

Counties

Trade Classification

- A: Metro/Large Trade Center
- B: Micropolitan/Moderate Trade Center
- C: Less Urban/Small Trade Center
- D: Rural/Local Trade Center

Kossuth County is assigned to Peer Group C.

Iowa State University Retail Trade Analysis Program

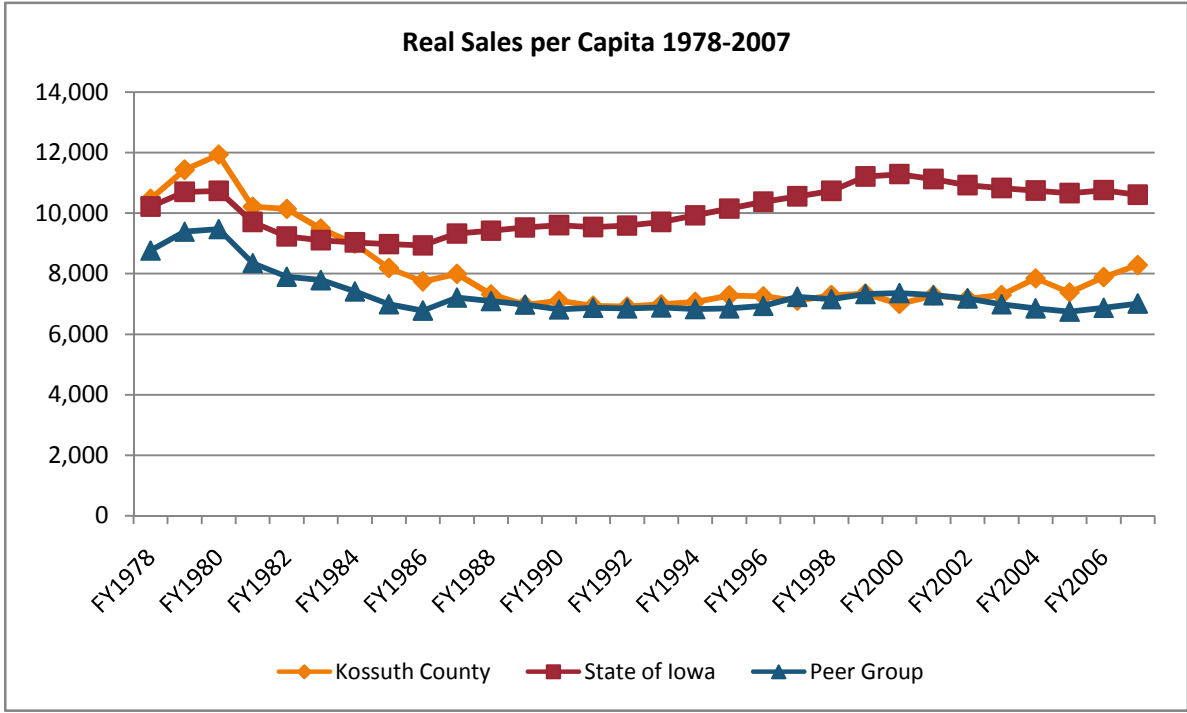


Retail Snapshot for Kossuth County

This section provides basic retail statistics for Kossuth County, including changes in levels from prior years. All sales figures are adjusted for inflation and expressed in 2007 dollars.

	2007	2006	% Change 2006-2007
Total retail sales (\$ millions)			
Kossuth County	132.6	124.3	6.6%
State of Iowa	31,645.7	31,108.4	1.7%
Peer Group: C	4,675.8	4,594.6	1.8%
Per capita retail sales (\$)			
Kossuth County	8,282	7,883	5.1%
State of Iowa	10,612	10,762	-1.4%
Peer Group: C	7,020	6,878	2.1%
Retail sales per business			
Kossuth County	207,261	204,838	1.2%
State of Iowa	366,326	364,974	0.4%

Per capita retail sales are an important indicator of the strength of an area's retail sector and are used by community leaders and businesses making location decisions. By comparing the changes in these numbers with the State figures and the peer group, one can determine if their local retail economy is performing better or worse than the bigger economic picture might suggest. Because the sales numbers are adjusted for inflation they can be used to look at changes over time.



Iowa State University Retail Trade Analysis Program



Demographic Snapshot for Kossuth County

The strength of a county's retail sector depends on many demographic factors including population distribution and change and the tastes and preferences of its consumers. Although these characteristics influence the look of the local economy they are not traditional economic measures. This section provides a snapshot of demographic measures influencing demand in Kossuth County.

Population level and change

	2007	2006	2000	Change 2000-2007	% Change 2000-2007
Kossuth County	16,011	16,181	17,630	(1,619)	-9.2%
State of Iowa	2,982,085	2,965,524	2,869,413	112,672	3.9%
Peer Group: C	666,063	668,041	674,577	(8,514)	-1.3%

Population distribution

2000 Census	Under 18	18-34	35-64	65 and up
Kossuth County	25.7%	15.1%	39.2%	20.1%
State of Iowa	25.0%	22.5%	37.5%	14.9%
2006 Estimate	Under 19	19-34	35-64	65 and up
Kossuth County	24.7%	13.6%	40.7%	21.1%
State of Iowa	26.8%	19.6%	39.1%	14.6%

The age of an area's population is a leading indicator for retail spending. According to the Bureau of Labor Statistics, household consumer spending is highly correlated with age. The **35-64** year old demographic accounts for **64%** of total annual consumer spending and only 53% of households nationally. The over 65 demographic accounts for 15% of total spending and the 18-34 group 23%. Monitoring the age distribution of a particular area can help project how

Educational attainment distribution

Percentage of adults

	Kossuth County	State of Iowa
Fewer than 12 years		
1990 Census	20.9	19.9
2000 Census	14.4	13.9
High school graduate		
1990 Census	40.3	38.5
2000 Census	38.9	36.1
Fewer than 4 years college		
1990 Census	27.0	24.7
2000 Census	33.1	28.8
College degree or higher		
1990 Census	11.8	16.9
2000 Census	13.6	21.2

Because educational level is correlated with income and influences the tastes and preferences of consumers, higher levels of education tend to be correlated with greater retail spending in the aggregate.



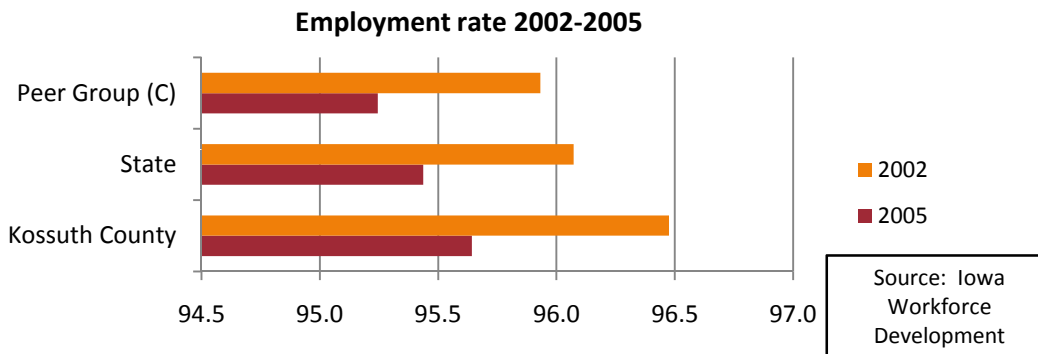
Economic Snapshot for Kossuth County

Employment and Wages

The strength of a county's economy is a major determinant of its retail strength and potential. Relevant indicators include income levels and distribution, wages, and the actual levels of employment. This section provides opportunity for comparison between Kossuth County, its peer group, and the State of Iowa in terms of relevant economic factors.

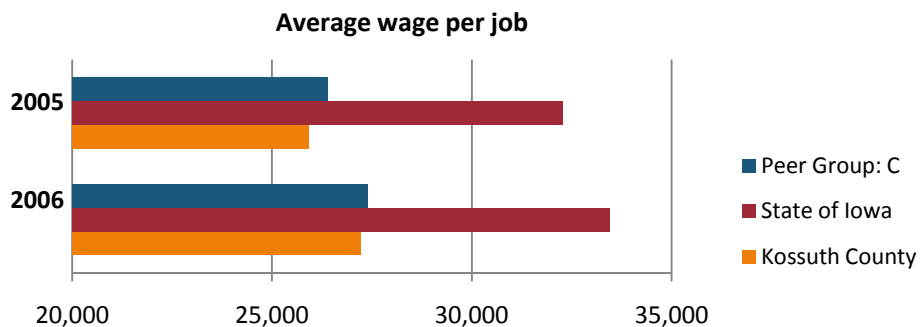
Employment/Labor Utilization

Total Civilian Labor Force	2002	2005
Kossuth County	9,079	8,996
State of Iowa	1,642,252	1,659,800
Employment Rate (%)		
Kossuth County	96.5	95.6
State	96.1	95.4
Peer Group: C	95.9	95.2



Average wage per job

Current dollars	2006	2005	% Change 2005-2006
Kossuth County	27,219	25,925	5.0%
State of Iowa	33,465	32,266	3.7%
Peer Group: C	27,387	26,383	3.8%
Kossuth County % of Iowa average	81.3%	80.3%	1.0%
Kossuth County % of Peer average	99.4%	98.3%	1.1%



Iowa State University Retail Trade Analysis Program



Economic Snapshot for Kossuth County

Income and Distribution

Two different income measures are provide here for comparison against the state and peer group levels. Income per capita includes wage income but also interest income, dividends, rent, and the like. It is aggregated and then divided by the subject population yielding a level of income that represents what each person in Kossuth County would earn if all income were distributed equally among the residents. Median household income can give us an idea of the income equality in an area with the median income representing the level of income where half of all households earn more and half earn less.

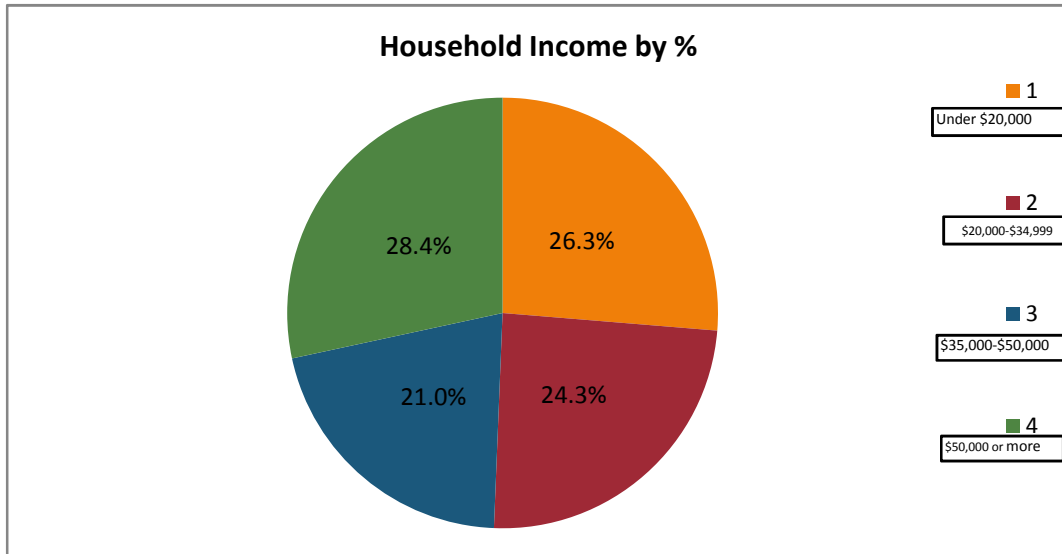
Personal income level

Per Capita Income	2006	2005	% Change 2005-2006
Kossuth County	31,732	31,306	1.4%
State of Iowa	31,670	30,887	2.5%
Peer Group: C	28,389	28,222	0.6%

Kossuth County State Income Index	1.00	1.01
Kossuth County Peer Income Index	1.12	1.11

The state income index is used in the calculation of the pull factor.

Household Income 2000 Census	Median Income	Under \$20,000 (1)	\$20,000 to \$34,999 (2)	\$35,000 to \$50,000 (3)	\$50,000 or more (4)
Kossuth County	34,562	26.3%	24.3%	21.0%	28.4%
State of Iowa	39,469	21.8%	22.1%	19.0%	37.1%

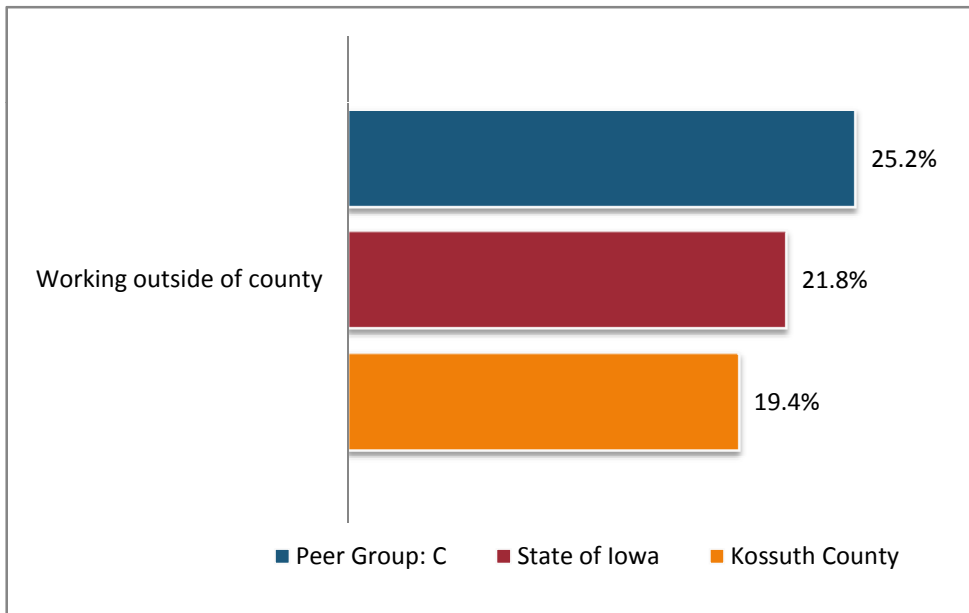




Economic Snapshot for Kossuth County Commuting Patterns

Commuting patterns can impact a county's retail trade performance in both positive and negative ways. If the county exhibits a high outflow of workers, it may also see more leakage than would otherwise be expected. On the other hand, if a county has a large inflow of workers it may experience higher than expected retail sales. As commuting distances have increased so too has its impact on retail sales. Another impact of out commuting may be higher incomes than the residents would be able to earn if they worked within their county of residence. It is possible that although some of these out commuters' retail dollars may "leak" to other counties, the increased income may help retail sales in their county of residence. This section provides commuting information for Kossuth County, its peer group and the state.

Out Commuting	Working outside of county	Working outside of city
Kossuth County	19.4%	43.5%
State of Iowa	21.8%	44.9%
Peer Group: C	25.2%	43.5%



Commuting Flow Ratio

Kossuth County
State of Iowa (avg.)

0.5
0.92

Ratio represents how many workers come into the county for every one that commutes out.

Daytime Population Change

Kossuth County
State of Iowa (avg.)

-4.5 %
-4.6 %

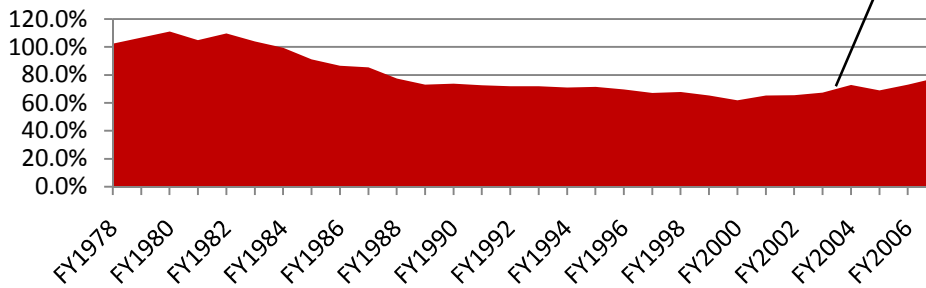
Iowa State University Retail Trade Analysis Program



Sales Data for Kossuth County

Year	Nominal Sales (\$)	Real Sales (\$)	Kossuth Per Capita Sales (\$)	State Per Capita Sales (\$)	Peer Group Per Capita Sales (\$)
FY1978	82,342,975	231,389,929	10,470	10,221	8,767
FY1979	96,508,817	252,658,173	11,432	10,706	9,391
FY1980	109,439,748	261,359,391	11,934	10,735	9,478
FY1981	103,426,046	223,577,908	10,213	9,713	8,356
FY1982	108,917,776	218,154,274	10,140	9,237	7,906
FY1983	105,581,722	201,201,291	9,489	9,113	7,793
FY1984	103,302,266	188,983,846	8,992	9,037	7,420
FY1985	96,613,806	170,516,042	8,187	8,978	6,994
FY1986	92,345,078	157,980,134	7,743	8,941	6,785
FY1987	94,109,441	157,259,263	7,989	9,330	7,215
FY1988	86,927,530	140,068,869	7,312	9,427	7,098
FY1989	85,700,595	132,547,457	6,964	9,532	6,985
FY1990	90,253,311	133,818,514	7,103	9,608	6,823
FY1991	90,979,257	128,941,807	6,936	9,546	6,874
FY1992	92,129,206	126,484,161	6,913	9,593	6,857
FY1993	95,240,340	127,204,214	6,985	9,712	6,889
FY1994	98,010,736	128,134,022	7,062	9,932	6,833
FY1995	103,323,299	132,146,417	7,276	10,153	6,862
FY1996	104,675,595	131,173,259	7,250	10,381	6,938
FY1997	104,059,311	127,609,863	7,108	10,560	7,241
FY1998	107,857,841	130,491,375	7,287	10,737	7,165
FY1999	108,535,145	130,064,105	7,340	11,213	7,329
FY2000	105,106,740	123,421,604	7,001	11,289	7,364
FY2001	108,686,706	124,668,225	7,276	11,126	7,296
FY2002	107,059,040	120,598,792	7,173	10,929	7,189
FY2003	109,260,212	121,009,110	7,293	10,831	6,996
FY2004	118,587,810	128,886,614	7,843	10,750	6,861
FY2005	113,898,953	120,381,325	7,375	10,665	6,751
FY2006	124,336,578	127,558,372	7,883	10,762	6,878
FY2007	132,595,483	132,595,483	8,282	10,612	7,020

Per Capita Sales Index as %



The Per Capita Sales Index is the county's sales per capita divided by the state's sales per capita. It is used with the income index to determine the pull factor. When the sales index is increasing, the county is experiencing growth in sales greater than that of the state.

Iowa State University Retail Trade Analysis Program

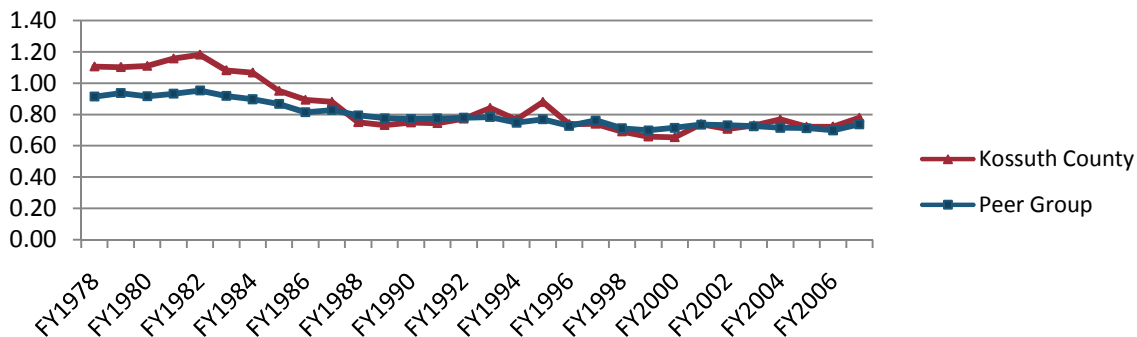


Sales Indicators for Kossuth County

This measure describes how well the county is servicing its population's retail demand.

Year	Number of firms	Sales per retail firm	Kossuth County Per Capita Sales Index	Peer Group Per Capita Sales Index	Kossuth County Pull Factor	Peer Group Pull Factor
FY1978	784	295,234	1.02	1.19	1.11	0.91
FY1979	798	316,713	1.07	1.22	1.10	0.94
FY1980	811	322,467	1.11	1.26	1.11	0.92
FY1981	830	269,452	1.05	1.22	1.16	0.93
FY1982	816	267,510	1.10	1.28	1.18	0.95
FY1983	819	245,742	1.04	1.22	1.08	0.92
FY1984	822	230,047	1.00	1.21	1.07	0.90
FY1985	801	213,012	0.91	1.17	0.95	0.87
FY1986	794	198,967	0.87	1.14	0.89	0.81
FY1987	763	206,174	0.86	1.11	0.88	0.83
FY1988	761	184,059	0.78	1.03	0.75	0.79
FY1989	756	175,385	0.73	1.00	0.73	0.78
FY1990	758	176,600	0.74	1.04	0.75	0.77
FY1991	747	172,728	0.73	1.01	0.74	0.77
FY1992	745	169,891	0.72	1.01	0.77	0.78
FY1993	737	172,656	0.72	1.01	0.84	0.78
FY1994	731	175,346	0.71	1.03	0.77	0.75
FY1995	734	179,975	0.72	1.06	0.88	0.77
FY1996	730	179,813	0.70	1.04	0.74	0.73
FY1997	718	177,853	0.67	0.98	0.74	0.76
FY1998	717	181,996	0.68	1.02	0.69	0.71
FY1999	696	187,008	0.65	1.00	0.66	0.70
FY2000	672	183,800	0.62	0.95	0.65	0.71
FY2001	674	184,899	0.65	1.00	0.74	0.73
FY2002	660	182,795	0.66	1.00	0.71	0.73
FY2003	622	194,627	0.67	1.04	0.73	0.72
FY2004	613	210,341	0.73	1.14	0.77	0.72
FY2005	614	196,221	0.69	1.09	0.72	0.71
FY2006	607	210,146	0.73	1.15	0.72	0.70
FY2007	640	207,261	0.78	1.18	0.78	0.74

Pull Factor 1978-2007



Iowa State University Retail Trade Analysis Program



Sales Performance for Kossuth County

Measuring the performance of the retail sector for a county begins with determining pull factors and other indices. With these measures we are able to calculate estimates of surplus and leakage for Kossuth County, and determine whether retail sales are exceeding or falling short of the potential. This report calculates both potential sales, which indicate what level of retail sales we would expect with no leakage and sales capacity. The sales capacity figure gives us the level of sales we would expect with average surplus or leakage for similar counties and when compared to actual sales, provides a realistic measure of sales performance.

Year	Actual Sales	Potential Sales	Surplus (Leakage)	% Potential	Sales Capacity	Over (under) Capacity	% Capacity
FY1978	231,389,929	209,038,781	22,351,148	10.7%	191,015,079	40,374,851	21.1%
FY1979	252,658,173	229,043,044	23,615,129	10.3%	214,521,785	38,136,387	17.8%
FY1980	261,359,391	235,493,509	25,865,882	11.0%	215,586,412	45,772,978	21.2%
FY1981	223,577,908	193,141,380	30,436,528	15.8%	180,079,483	43,498,425	24.2%
FY1982	218,154,274	184,507,049	33,647,225	18.2%	175,804,250	42,350,024	24.1%
FY1983	201,201,291	185,806,916	15,394,375	8.3%	170,524,896	30,676,395	18.0%
FY1984	188,983,846	176,942,749	12,041,097	6.8%	158,706,315	30,277,531	19.1%
FY1985	170,516,042	179,417,158	(8,901,116)	-5.0%	155,570,205	14,945,837	9.6%
FY1986	157,980,134	176,696,843	(18,716,709)	-10.6%	143,842,363	14,137,771	9.8%
FY1987	157,259,263	178,493,523	(21,234,259)	-11.9%	147,875,382	9,383,881	6.3%
FY1988	140,068,869	186,807,447	(46,738,578)	-25.0%	148,452,420	(8,383,551)	-5.6%
FY1989	132,547,457	181,038,111	(48,490,654)	-26.8%	140,593,390	(8,045,933)	-5.7%
FY1990	133,818,514	178,637,705	(44,819,192)	-25.1%	137,979,771	(4,161,257)	-3.0%
FY1991	128,941,807	173,349,151	(44,407,344)	-25.6%	134,311,052	(5,369,245)	-4.0%
FY1992	126,484,161	163,565,586	(37,081,425)	-22.7%	127,488,262	(1,004,101)	-0.8%
FY1993	127,204,214	150,971,810	(23,767,596)	-15.7%	118,234,552	8,969,662	7.6%
FY1994	128,134,022	166,942,444	(38,808,422)	-23.2%	124,688,259	3,445,763	2.8%
FY1995	132,146,417	150,091,971	(17,945,554)	-12.0%	115,382,393	16,764,024	14.5%
FY1996	131,173,259	177,677,382	(46,504,124)	-26.2%	129,077,551	2,095,707	1.6%
FY1997	127,609,863	172,302,752	(44,692,889)	-25.9%	131,259,260	(3,649,397)	-2.8%
FY1998	130,491,375	188,714,040	(58,222,665)	-30.9%	134,298,179	(3,806,803)	-2.8%
FY1999	130,064,105	197,310,828	(67,246,723)	-34.1%	137,815,821	(7,751,716)	-5.6%
FY2000	123,421,604	188,535,274	(65,113,670)	-34.5%	134,701,264	(11,279,660)	-8.4%
FY2001	124,668,225	169,034,781	(44,366,556)	-26.2%	124,172,854	495,371	0.4%
FY2002	120,598,792	170,147,578	(49,548,785)	-29.1%	124,483,349	(3,884,556)	-3.1%
FY2003	121,009,110	165,734,991	(44,725,881)	-27.0%	120,070,457	938,653	0.8%
FY2004	128,886,614	167,575,604	(38,688,990)	-23.1%	119,945,225	8,941,389	7.5%
FY2005	120,381,325	166,782,742	(46,401,416)	-27.8%	118,739,507	1,641,819	1.4%
FY2006	127,558,372	176,499,438	(48,941,066)	-27.7%	123,450,711	4,107,661	3.3%
FY2007	132,595,483	170,240,461	(37,644,978)	-22.1%	125,635,576	6,959,907	5.5%

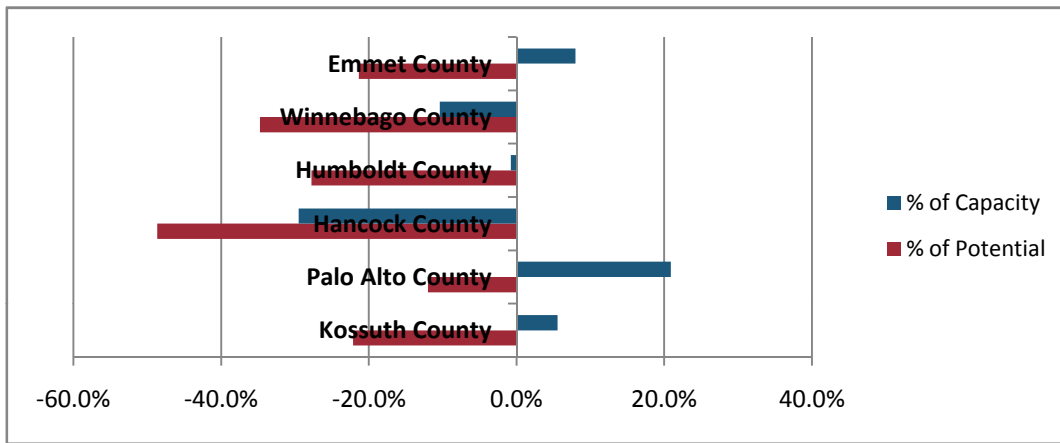
It is possible for a county to show a surplus but still be below its capacity, which simply indicates that it has a retail surplus but has the capacity to draw even more. The converse can be true, especially in smaller counties where they may show a leakage but may be at or above capacity. In this case it means that they have a leakage, but are performing well given the leakage we would expect.

Iowa State University Retail Trade Analysis Program



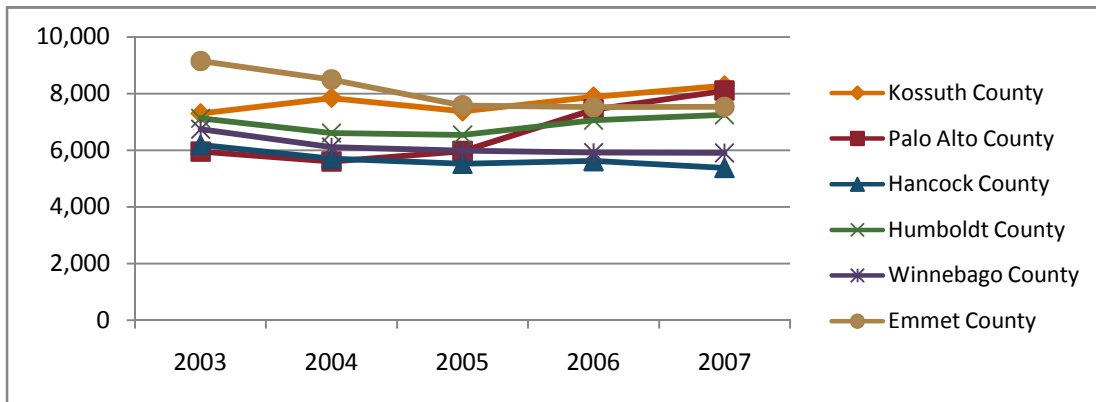
Geographic Competition Performance Measures for Kossuth County

Subject	Actual Sales	Potential Sales	Sales Capacity	% of Potential	% of Capacity
Kossuth County	132,595,483	170,240,461	125,635,576	-22.1%	5.5%
Palo Alto County	77,367,218	87,898,051	63,996,943	-12.0%	20.9%
Hancock County	62,832,605	122,378,103	89,101,231	-48.7%	-29.5%
Humboldt County	72,286,583	100,045,031	72,840,935	-27.7%	-0.8%
Winnebago County	66,275,432	101,577,798	73,956,914	-34.8%	-10.4%
Emmet County	78,934,669	100,387,786	73,090,489	-21.4%	8.0%



Real Per Capita Sales

(2007 \$)	2003	2004	2005	2006	2007
Kossuth County	7,293	7,843	7,375	7,883	8,282
Palo Alto County	5,949	5,601	5,968	7,435	8,102
Hancock County	6,189	5,710	5,525	5,622	5,380
Humboldt County	7,120	6,607	6,538	7,058	7,247
Winnebago County	6,741	6,110	5,985	5,918	5,909
Emmet County	9,144	8,495	7,582	7,521	7,533



Iowa State University Retail Trade Analysis Program



E-Commerce and Internet Sales Impact for Kossuth County

According to the U.S. Census Bureau, e-commerce sales in 2007 accounted for 3.4 percent of total sales. Although e-commerce may not account for a large percentage of total retail sales, it is the fastest growing segment of the retail landscape. While total retail sales only increased 4% in 2007 from 2006, e-commerce sales saw an increase of 19% in the same time period. According to a Forrester Research report, e-commerce will account for 10% of total offline sales by 2008.

If the national data holds for Kossuth County, we would expect that approximately 3% of potential sales leakage could be attributed to internet retail leakage.

Kossuth County

Actual Sales	132,595,483
Potential Sales	170,240,461
Estimated Internet Leakage	5,107,214
Potential Sales less internet leakage	165,133,247
Internet adjusted surplus (leakage)	(32,537,764)



Per Capita Estimated Internet Leakage	\$319
--	--------------

Because internet retailing is a relatively new phenomenon, detailed data on the local impact on sales are difficult to find. This report uses the low estimate of 3% to try and account for some of the impact on local sales. In future reports and as data become available, more precise measures of e-commerce's impact will be presented.

Factors that may increase the use of e-commerce here in Iowa are the increase in internet connectivity and access to broadband technology. One of the most important factors maybe the rising costs of fuel, encouraging consumers to limit the number of their shopping trips. For consumers who travel outside of their local area to a larger trade center, the increasing costs of transportation may encourage increased use of the internet for shopping. In this instance, it is likely that the metropolitan areas or larger trade centers that draw from distant communities may feel the impact more than smaller communities.

According to the National Retail Federation, the top categories in volume of sales for e-retailers are:

1. Computer hardware/software
2. Books
3. Music/video
4. Toys/video games
5. Gift cards/certificates
6. Consumer electronics

Iowa State University Retail Trade Analysis Program

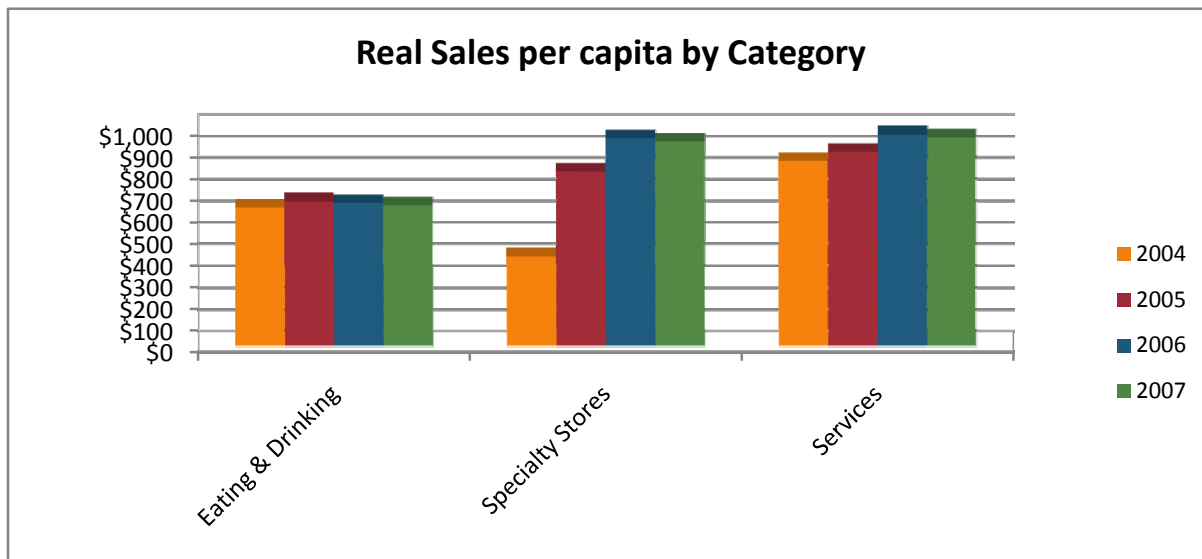


Merchandise Category Sales for Kossuth County


Selected retail categories are presented here, with sales reported in real dollars. To protect the confidentiality of individual firms, some detail may be partially or completely suppressed at the county level. These categories have been chosen because they reflect the categories most representative of a county's performance in attracting tourism and recreation.

Real Sales by category (\$)	2004	2005	2006	2007
Eating & Drinking	10,453,735	10,900,687	10,601,609	10,333,840
Specialty Stores	6,756,700	13,127,562	15,484,129	15,093,040
Services	14,021,262	14,619,627	15,780,700	15,382,120


Per Capita Real Sales by category (\$)	2004	2005	2006	2007
Kossuth County				
Eating & Drinking	\$636	\$668	\$655	\$645
Specialty Stores	\$411	\$804	\$957	\$943
Services	\$853	\$896	\$975	\$961
State of Iowa				
Eating & Drinking	\$951	\$970	\$1,002	\$1,034
Specialty Stores	\$813	\$799	\$813	\$811
Services	\$1,349	\$1,351	\$1,391	\$1,434
Kossuth County % of State per capita sales				
Eating & Drinking	66.9%	68.8%	65.4%	62.4%
Specialty Stores	50.6%	100.7%	117.7%	116.2%
Services	63.2%	66.3%	70.1%	67.0%



Iowa State University Retail Trade Analysis Program

Pull Factors 	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007
Adair County	0.71	0.71	0.66	0.65	0.63	0.70	0.60	0.65
Adams County	0.56	0.58	0.57	0.64	0.59	0.57	0.48	0.60
Allamakee County	0.80	0.76	0.83	0.74	0.74	0.69	0.83	0.67
Appanoose County	0.80	0.74	0.76	0.79	0.77	0.76	0.76	0.79
Audubon County	0.45	0.51	0.49	0.50	0.49	0.48	0.40	0.44
Benton County	0.49	0.55	0.65	0.78	0.62	0.48	0.42	0.42
Black Hawk County	1.23	1.22	1.20	1.21	1.20	1.20	1.21	1.22
Boone County	0.59	0.64	0.58	0.62	0.64	0.63	0.63	0.61
Bremer County	0.61	0.65	0.64	0.64	0.63	0.61	0.57	0.60
Buchanan County	0.59	0.62	0.62	0.61	0.63	0.65	0.66	0.67
Buena Vista County	0.85	0.89	0.88	0.87	0.91	0.92	0.86	0.95
Butler County	0.45	0.46	0.44	0.44	0.42	0.41	0.36	0.34
Calhoun County	0.43	0.43	0.42	0.41	0.39	0.41	0.37	0.40
Carroll County	1.03	1.08	1.06	1.04	1.09	1.11	1.03	1.13
Cass County	0.82	0.81	0.80	0.83	0.80	0.80	0.85	0.88
Cedar County	0.43	0.44	0.44	0.45	0.44	0.45	0.43	0.45
Cerro Gordo County	1.32	1.28	1.27	1.25	1.27	1.25	1.26	1.29
Cherokee County	0.71	0.70	0.71	0.72	0.65	0.68	0.66	0.72
Chickasaw County	0.59	0.59	0.62	0.67	0.65	0.67	0.65	0.70
Clarke County	0.91	0.79	0.78	0.74	0.68	0.67	0.69	0.67
Clay County	1.23	1.34	1.32	1.28	1.28	1.24	1.32	1.50
Clayton County	0.53	0.55	0.56	0.55	0.53	0.55	0.53	0.60
Clinton County	0.83	0.92	0.88	0.87	0.87	0.91	1.03	1.05
Crawford County	0.75	0.75	0.75	0.72	0.72	0.72	0.67	0.69
Dallas County	0.53	0.58	0.61	0.64	0.66	1.01	1.10	1.16
Davis County	0.58	0.61	0.63	0.63	0.61	0.61	0.59	0.61
Decatur County	0.52	0.51	0.50	0.51	0.49	0.50	0.49	0.53
Delaware County	0.64	0.68	0.65	0.62	0.65	0.62	0.58	0.59
Des Moines County	1.14	1.12	1.10	1.11	1.12	1.10	1.10	1.16
Dickinson County	1.18	1.21	1.24	1.32	1.29	1.25	1.25	1.30
Dubuque County	1.11	1.12	1.13	1.13	1.15	1.17	1.18	1.17
Emmet County	0.91	0.97	0.93	0.96	0.88	0.77	0.76	0.79
Fayette County	0.75	0.80	0.75	0.68	0.65	0.67	0.61	0.63
Floyd County	0.75	0.74	0.71	0.68	0.67	0.64	0.59	0.63
Franklin County	0.52	0.61	0.57	0.54	0.51	0.50	0.52	0.54
Fremont County	0.70	0.67	0.69	0.73	0.75	0.71	0.67	0.69
Greene County	0.74	0.71	0.73	0.72	0.66	0.63	0.60	0.63
Grundy County	0.43	0.46	0.48	0.47	0.49	0.49	0.47	0.47
Guthrie County	0.52	0.53	0.55	0.54	0.50	0.50	0.46	0.47
Hamilton County	0.58	0.60	0.59	0.59	0.58	0.57	0.55	0.57
Hancock County	0.52	0.54	0.56	0.61	0.53	0.50	0.51	0.51
Hardin County	0.91	0.94	0.96	0.88	0.96	0.89	0.81	0.93
Harrison County	0.52	0.47	0.45	0.46	0.42	0.41	0.40	0.40
Henry County	0.72	0.74	0.75	0.74	0.74	0.81	0.75	0.79
Howard County	0.65	0.61	0.65	0.63	0.58	0.60	0.58	0.62
Humboldt County	0.69	0.70	0.75	0.71	0.65	0.65	0.67	0.72
Ida County	0.60	0.64	0.70	0.65	0.64	0.55	0.54	0.55
Iowa County	1.07	0.96	1.02	1.01	0.98	0.93	0.88	0.88
Jackson County	0.64	0.65	0.64	0.63	0.61	0.60	0.58	0.61

Iowa State University Retail Trade Analysis Program

Pull Factors 	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007
Jasper County	0.64	0.82	0.91	0.92	0.90	0.90	0.89	0.94
Jefferson County	0.86	0.93	0.87	0.98	1.10	1.16	1.07	1.13
Johnson County	1.16	1.09	1.06	1.06	1.16	1.16	1.17	1.18
Jones County	0.81	0.80	0.80	0.80	0.84	0.82	0.79	0.85
Keokuk County	0.32	0.35	0.35	0.33	0.33	0.33	0.31	0.33
Kossuth County	0.65	0.74	0.71	0.73	0.77	0.72	0.72	0.78
Lee County	0.84	0.88	0.86	0.85	0.90	0.86	0.88	0.86
Linn County	1.26	1.25	1.22	1.25	1.29	1.27	1.27	1.27
Louisa County	0.26	0.25	0.27	0.25	0.25	0.27	0.26	0.27
Lucas County	0.57	0.50	0.52	0.53	0.52	0.48	0.46	0.53
Lyon County	0.50	0.55	0.57	0.55	0.57	0.57	0.56	0.59
Madison County	0.58	0.61	0.61	0.54	0.55	0.54	0.53	0.52
Mahaska County	0.80	0.80	0.79	0.76	0.80	0.81	0.79	0.80
Marion County	0.72	0.71	0.66	0.75	0.75	0.75	0.73	0.74
Marshall County	0.93	0.93	0.97	0.92	0.86	0.83	0.85	0.83
Mills County	0.30	0.32	0.32	0.30	0.28	0.28	0.29	0.28
Mitchell County	0.52	0.58	0.57	0.57	0.55	0.58	0.55	0.60
Monona County	0.60	0.63	0.61	0.61	0.62	0.63	0.58	0.65
Monroe County	0.56	0.56	0.54	0.56	0.51	0.48	0.40	0.43
Montgomery County	0.77	0.78	0.76	0.71	0.71	0.69	0.64	0.70
Muscatine County	0.87	0.92	0.88	0.86	0.87	0.86	0.86	0.86
O'Brien County	0.66	0.74	0.75	0.74	0.72	0.76	0.70	0.70
Osceola County	0.56	0.58	0.59	0.62	0.62	0.55	0.54	0.61
Page County	0.66	0.65	0.58	0.61	0.62	0.62	0.58	0.62
Palo Alto County	0.59	0.62	0.69	0.68	0.65	0.67	0.78	0.88
Plymouth County	0.59	0.60	0.61	0.63	0.64	0.66	0.66	0.64
Pocahontas County	0.46	0.51	0.50	0.50	0.50	0.51	0.46	0.53
Polk County	1.41	1.34	1.33	1.33	1.26	1.24	1.24	1.20
Pottawattamie County	1.06	1.04	1.08	1.04	1.02	1.03	1.08	1.12
Poweshiek County	0.67	0.67	0.67	0.65	0.61	0.61	0.63	0.69
Ringgold County	0.53	0.59	1.04	1.00	0.72	0.81	0.66	0.81
Sac County	0.60	0.63	0.61	0.55	0.54	0.57	0.50	0.54
Scott County	1.17	1.19	1.19	1.21	1.28	1.26	1.24	1.21
Shelby County	0.69	0.69	0.64	0.63	0.59	0.61	0.57	0.58
Sioux County	0.78	0.80	0.79	0.77	0.82	0.81	0.87	0.89
Story County	1.02	0.94	0.95	0.94	0.98	0.94	0.96	0.96
Tama County	0.53	0.58	0.61	0.62	0.56	0.51	0.61	0.65
Taylor County	0.41	0.45	0.43	0.43	0.41	0.41	0.36	0.40
Union County	1.07	1.15	1.09	1.10	1.11	1.09	1.10	1.10
Van Buren County	0.42	0.44	0.47	0.40	0.39	0.38	0.35	0.41
Wapello County	1.07	1.08	1.06	1.02	0.98	1.10	1.07	1.09
Warren County	0.48	0.48	0.49	0.50	0.49	0.50	0.47	0.46
Washington County	0.59	0.60	0.57	0.61	0.61	0.58	0.56	0.64
Wayne County	0.44	0.42	0.44	0.48	0.46	0.48	0.44	0.44
Webster County	1.36	1.32	1.30	1.24	1.22	1.24	1.30	1.29
Winnebago County	0.66	0.75	0.81	0.73	0.64	0.63	0.62	0.65
Winneshiek County	0.83	0.82	0.83	0.78	0.78	0.81	0.80	0.83
Woodbury County	1.18	1.18	1.19	1.18	1.21	1.24	1.29	1.30
Worth County	0.36	0.41	0.39	0.35	0.37	0.40	0.35	0.43
Wright County	0.63	0.67	0.63	0.60	0.58	0.56	0.55	0.59

Iowa State University Retail Trade Analysis Program



Pull Factors by County, Lowest to Highest, Fiscal Year 2007

99. Louisa County	0.27	49. Buchanan County	0.67
98. Mills County	0.28	48. Allamakee County	0.67
97. Keokuk County	0.33	47. Fremont County	0.69
96. Butler County	0.34	46. Poweshiek County	0.69
95. Calhoun County	0.40	45. Crawford County	0.69
94. Taylor County	0.40	44. Chickasaw County	0.70
93. Harrison County	0.40	43. Montgomery County	0.70
92. Van Buren County	0.41	42. O'Brien County	0.70
91. Benton County	0.42	41. Humboldt County	0.72
90. Monroe County	0.43	40. Cherokee County	0.72
89. Worth County	0.43	39. Marion County	0.74
88. Wayne County	0.44	38. Kossuth County	0.78
87. Audubon County	0.44	37. Emmet County	0.79
86. Cedar County	0.45	36. Appanoose County	0.79
85. Warren County	0.46	35. Henry County	0.79
84. Grundy County	0.47	34. Mahaska County	0.80
83. Guthrie County	0.47	33. Ringgold County	0.81
82. Hancock County	0.51	32. Marshall County	0.83
81. Madison County	0.52	31. Winneshiek County	0.83
80. Pocahontas County	0.53	30. Jones County	0.85
79. Lucas County	0.53	29. Muscatine County	0.86
78. Decatur County	0.53	28. Lee County	0.86
77. Franklin County	0.54	27. Palo Alto County	0.88
76. Sac County	0.54	26. Cass County	0.88
75. Ida County	0.55	25. Iowa County	0.88
74. Hamilton County	0.57	24. Sioux County	0.89
73. Shelby County	0.58	23. Hardin County	0.93
72. Wright County	0.59	22. Jasper County	0.94
71. Delaware County	0.59	21. Buena Vista County	0.95
70. Lyon County	0.59	20. Story County	0.96
69. Clayton County	0.60	19. Clinton County	1.05
68. Mitchell County	0.60	18. Wapello County	1.09
67. Adams County	0.60	17. Union County	1.10
66. Bremer County	0.60	16. Pottawattamie Count	1.12
65. Osceola County	0.61	15. Carroll County	1.13
64. Jackson County	0.61	14. Jefferson County	1.13
63. Davis County	0.61	13. Des Moines County	1.16
62. Boone County	0.61	12. Dallas County	1.16
61. Howard County	0.62	11. Dubuque County	1.17
60. Page County	0.62	10. Johnson County	1.18
59. Floyd County	0.63	9. Polk County	1.20
58. Greene County	0.63	8. Scott County	1.21
57. Fayette County	0.63	7. Black Hawk County	1.22
56. Washington County	0.64	6. Linn County	1.27
55. Plymouth County	0.64	5. Webster County	1.29
54. Tama County	0.65	4. Cerro Gordo County	1.29
53. Adair County	0.65	3. Dickinson County	1.30
52. Winnebago County	0.65	2. Woodbury County	1.30
51. Monona County	0.65	1. Clay County	1.50
50. Clarke County	0.67		

Iowa State University Retail Trade Analysis Program



Per Capita Sales (\$) by County, Lowest to Highest, Fiscal Year 2007

99. Louisa County	2,582	49. Boone County	6,430
98. Keokuk County	2,987	48. Bremer County	6,527
97. Van Buren County	3,170	47. Washington County	6,535
96. Butler County	3,176	46. Wright County	6,608
95. Mills County	3,229	45. Chickasaw County	6,612
94. Taylor County	3,432	44. Ringgold County	6,716
93. Wayne County	3,439	43. Plymouth County	6,744
92. Worth County	3,556	42. Jones County	6,852
91. Calhoun County	3,622	41. Fremont County	6,908
90. Harrison County	3,687	40. O'Brien County	7,083
89. Decatur County	3,737	39. Cherokee County	7,131
88. Benton County	4,069	38. Poweshiek County	7,209
87. Monroe County	4,085	37. Marion County	7,221
86. Lucas County	4,211	36. Humboldt County	7,247
85. Audubon County	4,556	35. Henry County	7,283
84. Cedar County	4,639	34. Emmet County	7,533
83. Guthrie County	4,679	33. Mahaska County	7,698
82. Davis County	4,734	32. Palo Alto County	8,102
81. Pocahontas County	4,779	31. Lee County	8,112
80. Warren County	4,908	30. Kossuth County	8,282
79. Grundy County	5,042	29. Cass County	8,414
78. Franklin County	5,051	28. Marshall County	8,467
77. Madison County	5,138	27. Buena Vista County	8,581
76. Lyon County	5,249	26. Winneshiek County	8,681
75. Osceola County	5,315	25. Sioux County	8,749
74. Sac County	5,341	24. Hardin County	8,755
73. Ida County	5,360	23. Jasper County	8,996
72. Jackson County	5,373	22. Muscatine County	9,422
71. Hancock County	5,380	21. Union County	9,707
70. Fayette County	5,416	20. Iowa County	9,804
69. Clayton County	5,497	19. Wapello County	9,843
68. Adams County	5,525	18. Clinton County	9,937
67. Mitchell County	5,580	17. Story County	10,335
66. Monona County	5,600	State of Iowa	10,612
65. Tama County	5,715	16. Jefferson County	10,842
64. Shelby County	5,741	15. Pottawattamie Count	11,371
63. Delaware County	5,750	14. Carroll County	11,495
62. Allamakee County	5,768	13. Des Moines County	11,729
61. Page County	5,769	12. Dubuque County	12,009
60. Clarke County	5,810	11. Webster County	12,378
59. Hamilton County	5,857	10. Black Hawk County	12,478
58. Winnebago County	5,909	9. Woodbury County	12,600
57. Greene County	5,922	8. Johnson County	13,688
56. Howard County	6,023	7. Dallas County	13,704
55. Floyd County	6,057	6. Cerro Gordo County	14,147
54. Crawford County	6,098	5. Scott County	14,252
53. Buchanan County	6,239	4. Dickinson County	14,825
52. Appanoose County	6,250	3. Linn County	14,940
51. Adair County	6,364	2. Clay County	15,034
50. Montgomery County	6,414	1. Polk County	15,832

Iowa State University Retail Trade Analysis Program



Change in Real Retail Sales 2000-2007 for Iowa's Counties

99. Butler County	-37.3%	49. Mills County	-7.0%
98. Monroe County	-35.7%	48. Cedar County	-6.6%
97. Harrison County	-29.6%	47. Cass County	-6.4%
96. Iowa County	-29.0%	46. Poweshiek County	-6.0%
95. Fayette County	-28.3%	45. Adams County	-6.0%
94. Montgomery County	-27.5%	44. Hancock County	-5.3%
93. Emmet County	-27.2%	43. Worth County	-5.1%
92. Ida County	-26.1%	42. Davis County	-5.0%
91. Greene County	-24.6%	41. Boone County	-4.6%
90. Calhoun County	-23.5%	40. Jones County	-4.6%
89. Shelby County	-23.1%	39. Bremer County	-4.6%
88. Benton County	-22.8%	38. Chickasaw County	-3.9%
87. Allamakee County	-21.9%	37. Marion County	-3.0%
86. Sac County	-21.7%	36. Mitchell County	-2.9%
85. Winnebago County	-21.5%	35. Story County	-2.9%
84. Clarke County	-20.7%	34. Grundy County	-2.9%
83. Floyd County	-20.4%	33. Washington County	-2.7%
82. Guthrie County	-20.0%	State of Iowa	-2.7%
81. Marshall County	-19.3%	32. Woodbury County	-2.7%
80. Van Buren County	-18.4%	31. O'Brien County	-2.6%
79. Adair County	-18.1%	30. Linn County	-2.3%
78. Lucas County	-17.6%	29. Carroll County	-1.6%
77. Page County	-17.1%	28. Decatur County	-0.2%
76. Cherokee County	-16.1%	27. Muscatine County	0.1%
75. Pocahontas County	-16.1%	26. Clayton County	0.3%
74. Franklin County	-15.0%	25. Buena Vista County	0.3%
73. Webster County	-14.2%	24. Wapello County	0.4%
72. Monona County	-14.0%	23. Black Hawk County	1.7%
71. Delaware County	-13.5%	22. Plymouth County	2.4%
70. Hardin County	-13.3%	21. Henry County	2.5%
69. Howard County	-13.0%	20. Dubuque County	2.7%
68. Crawford County	-12.8%	19. Warren County	2.7%
67. Taylor County	-12.5%	18. Dickinson County	3.3%
66. Jackson County	-12.4%	17. Scott County	3.3%
65. Hamilton County	-12.3%	16. Louisa County	3.7%
64. Lee County	-11.9%	15. Winneshiek County	4.4%
63. Wright County	-11.3%	14. Jefferson County	4.6%
62. Audubon County	-11.3%	13. Buchanan County	5.4%
61. Appanoose County	-11.3%	12. Lyon County	6.3%
60. Des Moines County	-10.7%	11. Pottawattamie County	7.2%
59. Polk County	-10.6%	10. Clay County	8.7%
58. Osceola County	-10.4%	9. Kossuth County	8.7%
57. Wayne County	-10.3%	8. Tama County	8.8%
56. Fremont County	-9.8%	7. Sioux County	16.7%
55. Madison County	-9.7%	6. Johnson County	17.4%
54. Union County	-9.3%	5. Clinton County	19.3%
53. Humboldt County	-9.0%	4. Jasper County	32.0%
52. Mahaska County	-8.4%	3. Palo Alto County	38.9%
51. Keokuk County	-8.1%	2. Ringgold County	52.7%
50. Cerro Gordo County	-7.5%	1. Dallas County	222.5%

Iowa State University Retail Trade Analysis Program

Acknowledgements: Iowa State University Extension has been involved in retail trade analysis for almost three decades, providing communities with data and analysis to aid in decision making. Understanding history, trends, and the current status of a community's retail sector allows decision makers to assess their strengths and weaknesses. Many of the methods and measures utilized in this report were created by Kenneth E. Stone, Professor Emeritus, Iowa State University. His work benefitted from the assistance of his associates Scott Baumler and Georgeanne Artz, and has been continued in recent years by Liesl Eathington. This report continues the mission of the Retail Trade Analysis Program, incorporating methods of previous reports with new methods and techniques. Support for the project is provided by Iowa State University's Departments of Economics and Sociology as well as Extension Community and Economic Development

For more information please contact the author:

Meghan O'Brien

Regional Capacity Analysis Program, ReCAP

www.recap.iastate.edu

171 Heady Hall

Ames, IA 50011

Phone (515)294-4095

mcobrien@iastate.edu



