



The**Retail**Coach.®

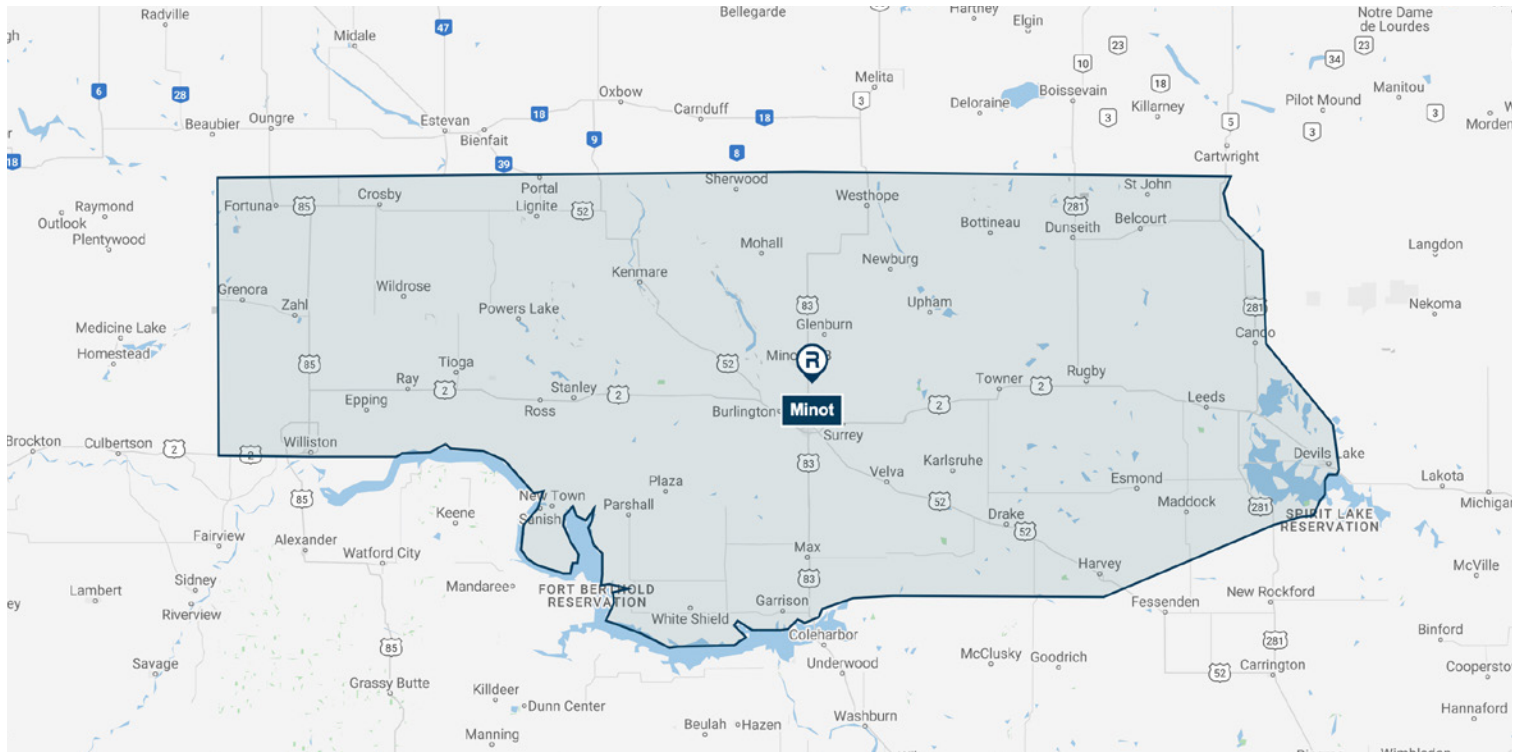
Primary Retail Trade Area Psychographic Profile

MINOT, NORTH DAKOTA

Prepared for City of Minot
June 2023

Primary Retail Trade Area • Demographic Snapshot

Minot, North Dakota



Population

2020	175,868	0 - 9 Years	15.49%
2023	181,811	10 - 17 Years	10.95%
2028	187,266	18 - 24 Years	9.40%

Educational Attainment (%)

Graduate or Professional Degree	6.22%	25 - 34 Years	15.03%
Bachelors Degree	18.67%	35 - 44 Years	12.63%
Associate Degree	14.76%	45 - 54 Years	9.84%
Some College	23.08%	55 - 64 Years	11.05%
High School Graduate (GED)	29.66%	65 and Older	15.62%
Some High School, No Degree	5.21%	Median Age	34.41
Less than 9th Grade	2.40%	Average Age	37.11

Income

Average HH	\$95,004
Median HH	\$74,234
Per Capita	\$40,348

Age

0 - 9 Years	15.49%
10 - 17 Years	10.95%
18 - 24 Years	9.40%
25 - 34 Years	15.03%
35 - 44 Years	12.63%
45 - 54 Years	9.84%
55 - 64 Years	11.05%
65 and Older	15.62%
Median Age	34.41
Average Age	37.11

Race Distribution (%)

White	72.81%
Black/African American	3.89%
American Indian/Alaskan	11.12%
Asian	1.57%
Native Hawaiian/Islander	0.18%
Other Race	2.99%
Two or More Races	7.44%
Hispanic	7.50%



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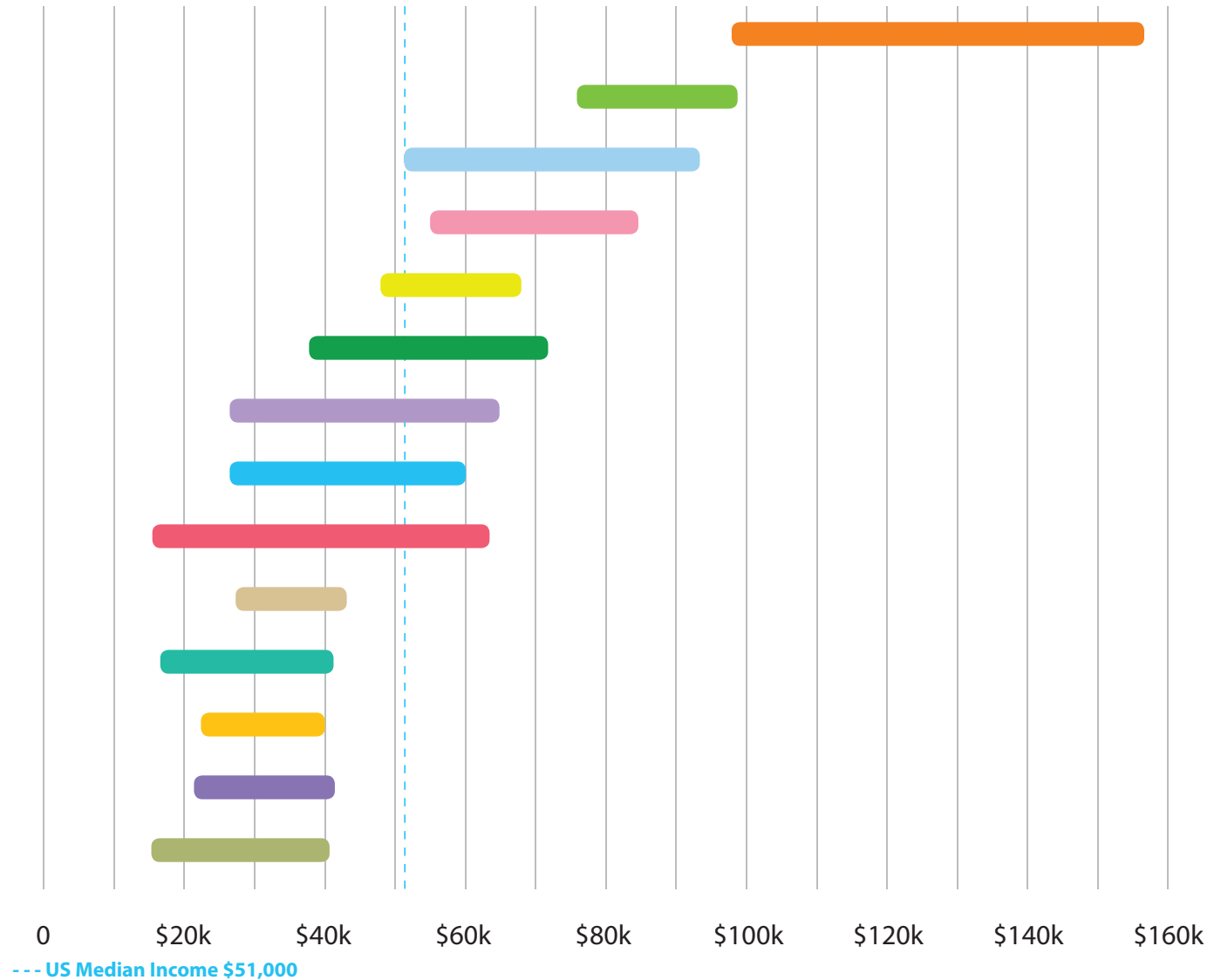
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Income Range of Lifemode Summary Groups

Minot, North Dakota



+ L1 AFFLUENT ESTATES

Established wealth — educated, well-traveled married couples

+ L2 UPSCALE AVENUES

Prosperous, married couples in higher density neighborhoods

+ L3 UPTOWN INDIVIDUALS

Younger, urban singles on the move

+ L4 FAMILY LANDSCAPES

Successful younger families in newer housing

+ L5 GENXURBAN

Gen X in middle age; families with fewer kids and a mortgage

+ L6 COZY COUNTRY

Empty nesters in bucolic settings

+ L7 ETHNIC ENCLAVES

Established diversity — young, Hispanic homeowners with families

+ L8 MIDDLE GROUND

Lifestyles of thirtysomethings

+ L9 SENIOR STYLES

Senior lifestyles reveal the effects of saving for retirement

+ L10 RUSTIC OUTPOSTS

Country life with older families, older homes

+ L11 MIDTOWN SINGLES

Millennials on the move; single, diverse, and urban

+ L12 HOMETOWN

Growing up and staying close to home; single householders

+ L13 NEXT WAVE

Urban denizens; young, diverse, hardworking families

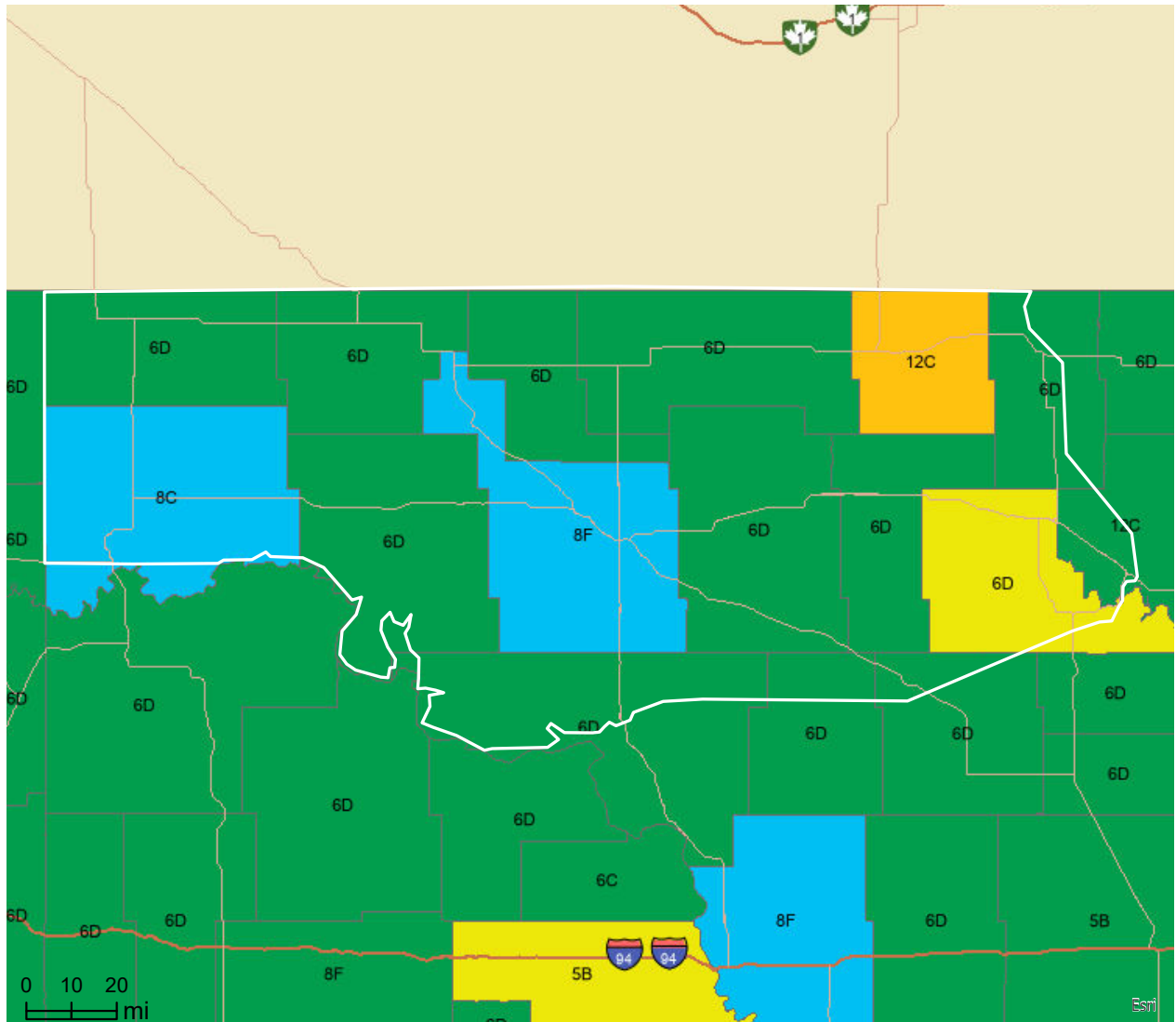
+ L14 SCHOLARS AND PATRIOTS

College campuses and military neighborhoods



Primary Retail Trade Area • Lifemode Summary Groups Map

Minot, North Dakota



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College campuses and military neighborhoods

Primary Retail Trade Area • Top Tapestry Segments

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College campuses and military neighborhoods

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Prairie Living (6D)	22.1%	22.1%	1.0%	1.0%	2253
2	Bright Young Professionals (8C)	11.1%	33.2%	2.3%	3.3%	482
3	Old and Newcomers (8F)	8.8%	42.0%	2.3%	5.6%	385
4	In Style (5B)	8.2%	50.1%	2.2%	7.8%	365
5	Green Acres (6A)	6.6%	56.7%	3.3%	11.1%	200
	Subtotal	56.8%		11.1%		
6	Middleburg (4C)	5.0%	61.6%	3.1%	14.2%	160
7	Emerald City (8B)	3.6%	65.2%	1.4%	15.6%	252
8	Retirement Communities (9E)	3.4%	68.7%	1.2%	16.8%	289
9	Midlife Constants (5E)	3.3%	72.0%	2.4%	19.2%	139
10	Small Town Sincerity (12C)	3.3%	75.3%	1.8%	21.0%	188
	Subtotal	18.6%		9.9%		
11	Rustbelt Traditions (5D)	3.1%	78.4%	2.1%	23.1%	143
12	Economic BedRock (10C)	3.0%	81.4%	0.6%	23.7%	521
13	Heartland Communities (6F)	2.1%	83.5%	2.2%	25.9%	95
14	Military Proximity (14A)	2.0%	85.5%	0.1%	26.0%	1,357
15	Comfortable Empty Nesters (5A)	1.9%	87.4%	2.4%	28.5%	78
	Subtotal	12.1%		7.4%		
16	Home Improvement (4B)	1.8%	89.2%	1.7%	30.1%	106
17	Southern Satellites (10A)	1.6%	90.8%	3.1%	33.2%	51
18	Young and Restless (11B)	1.3%	92.0%	1.8%	35.0%	73
19	City Commons (11E)	1.3%	93.3%	0.9%	35.9%	147
20	Set to Impress (11D)	1.3%	94.6%	1.4%	37.3%	91
	Subtotal	7.3%		8.9%		
	Total	94.6%		37.3%		254

6D LifeMode Group: Cozy Country Living Prairie Living

US Households: 1,323,200
Average Household Size: 2.51

Median Age: 44.4
Median Household Income: \$54,300

WHO ARE WE?

Prairie Living is Tapestry Segmentation's most rural market, comprising about 1.2 percent of households, located mainly in the Midwest, with a predominance of self-employed farmers. These agricultural communities are not diverse, dominated by married-couple families that own single-family dwellings and many vehicles. Median household income is similar to the US, and labor force participation is slightly higher. Faith is important to this hardworking market. When they find time to relax, they favor outdoor activities.

OUR NEIGHBORHOOD

- About four-fifths of households are owner occupied.
- Dominant household type is married-couples with no children.
- Most are single-family homes (87%) built before 1980; a higher proportion were built before 1940 (Index 218).
- Higher percentage of vacant housing units is at 16.5% (Index 146).
- Most households own 2 or 3 vehicles; this is the highest ranked market for owning 4 or more vehicles.

SOCIOECONOMIC TRAITS

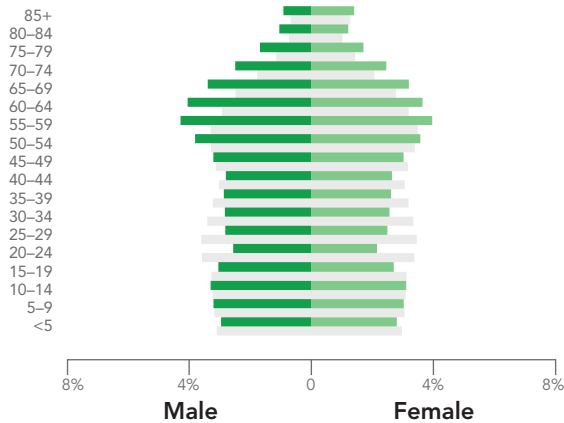
- More than half have completed some college education or hold a degree.
- At 2.9%, the unemployment rate is almost less than half the US rate.
- Labor force participation rate slightly higher at 65%.
- Wage and salary income for 72% of households plus self-employment income for 23% (Index 217).
- Faith and religion are important to these residents.
- Tend to buy things when they need them, rather than when they want them or to be trendy.
- Somewhat resistant to new technology.
- Creatures of habit when purchasing food items.

6D LifeMode Group: Cozy Country Living Prairie Living

AGE BY SEX (Esri data)

Median Age: **44.4** US: 38.2

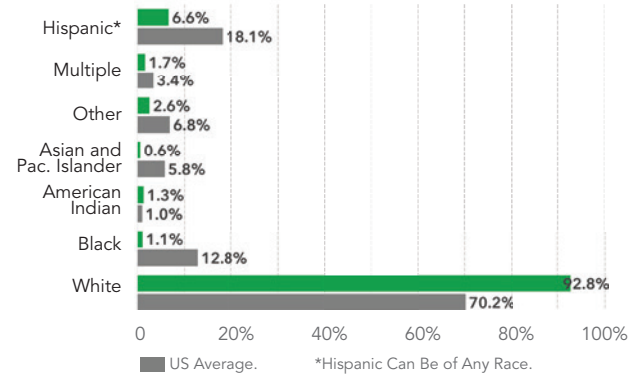
■ Indicates US



RACE AND ETHNICITY (Esri data)

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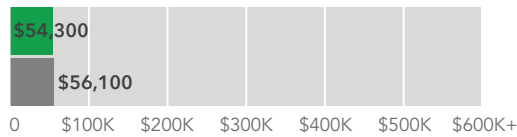
Diversity Index: **24.6** US: 64.0



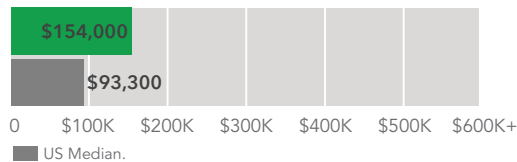
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income



Median Net Worth



HOUSING

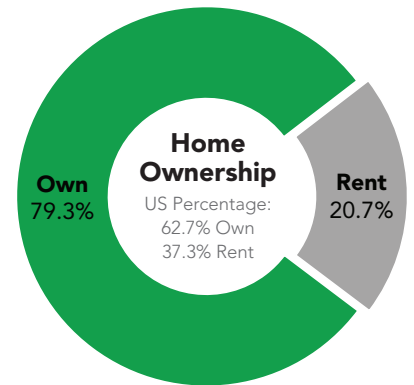
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

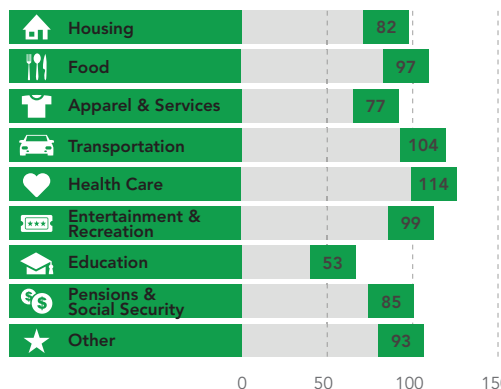
Median Value:
\$139,800

US Median: \$207,300



AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



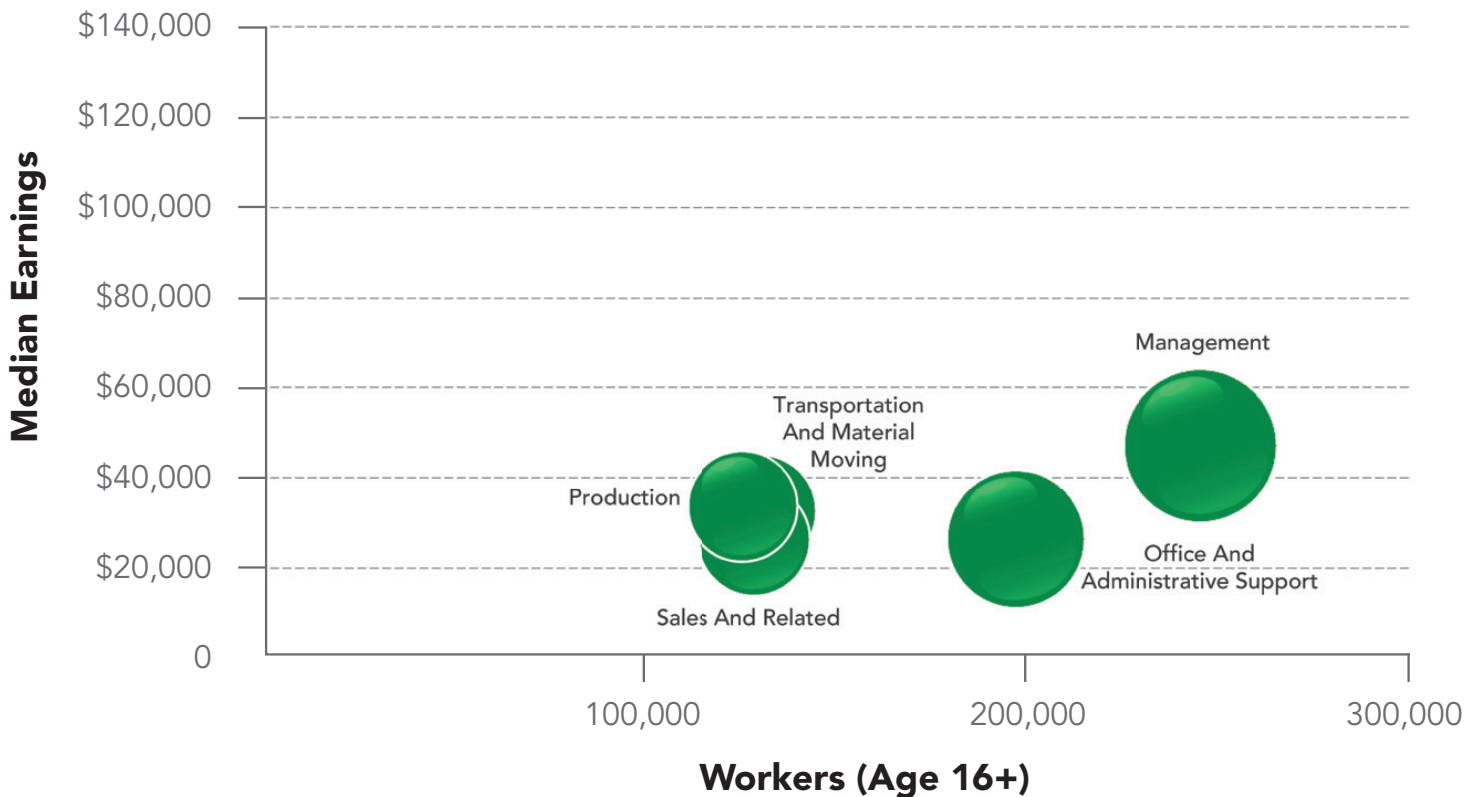
6D LifeMode Group: Cozy Country Living Prairie Living

Market Profile

- Many own a truck, riding lawn mower, and ATV/UTV and have a satellite dish.
- They purchased plants and seeds in the past year for their vegetable garden, where their tiller comes in handy.
- They favor banking in person, have noninterest checking accounts, invest in CDs (more than 6 months), and have term/whole life insurance.
- They are pet owners.
- Leisure activities include fishing, hunting, boating, camping, and attending country music concerts.
- Residents prefer to listen to faith and inspirational, as well as country music on the radio.
- They read the local newspaper as well as home service, and fishing/hunting magazines.
- They contribute to religious organizations and belong to religious clubs.
- Walmart is a favorite shopping stop; Subway is a favorite eating spot.

OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



8C LifeMode Group: Middle Ground Bright Young Professionals

US Households: 2,750,200
Average Household Size: 2.41

Median Age: 33.0
Median Household Income: \$54,000

WHO ARE WE?

Bright Young Professionals is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. More than one out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology.

OUR NEIGHBORHOOD

- Approximately 57% of the households rent; 43% own their homes.
- Household type is primarily couples, married (or unmarried), with above average concentrations of both single-parent (Index 125) and single-person (Index 115) households.
- Multiunit buildings or row housing make up 56% of the housing stock (row housing (Index 178), buildings with 5–19 units (Index 275)); 43% built 1980–99.
- Average rent mirrors the US (Index 100).
- Lower vacancy rate is at 8.2%.

SOCIOECONOMIC TRAITS

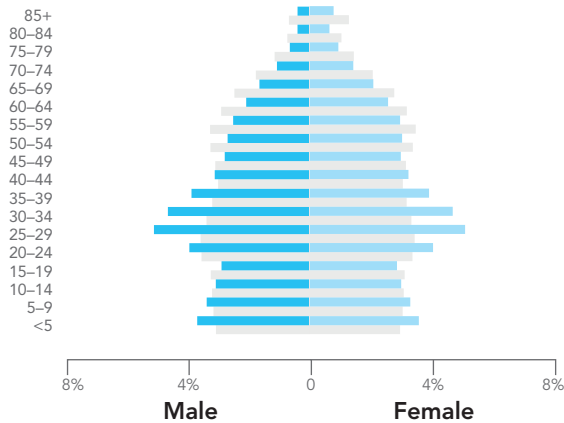
- Education completed: 35% with some college or an associate's degree, 33% with a bachelor's degree or higher.
- Unemployment rate is lower at 4.7%, and labor force participation rate of 72% is higher than the US rate.
- These consumers are up on the latest technology.
- They get most of their information from the Internet.
- Concern about the environment, impacts their purchasing decisions.

8C LifeMode Group: Middle Ground Bright Young Professionals

AGE BY SEX (Esri data)

Median Age: 33.0 US: 38.2

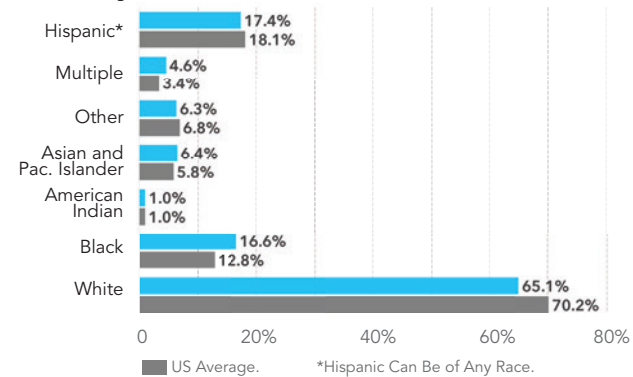
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RACE AND ETHNICITY (Esri data)

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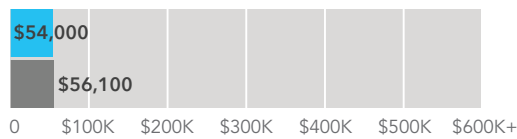
Diversity Index: 67.5 US: 64.0



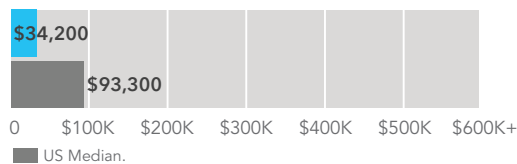
INCOME AND NET WORTH

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Median Household Income



Median Net Worth



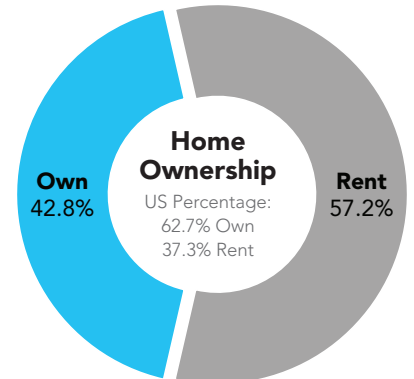
HOUSING

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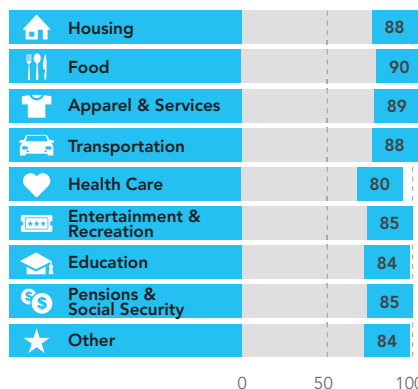
Typical Housing:
Single Family;
Multi-Units

Average Rent:
\$1,042



AVERAGE HOUSEHOLD BUDGET INDEX

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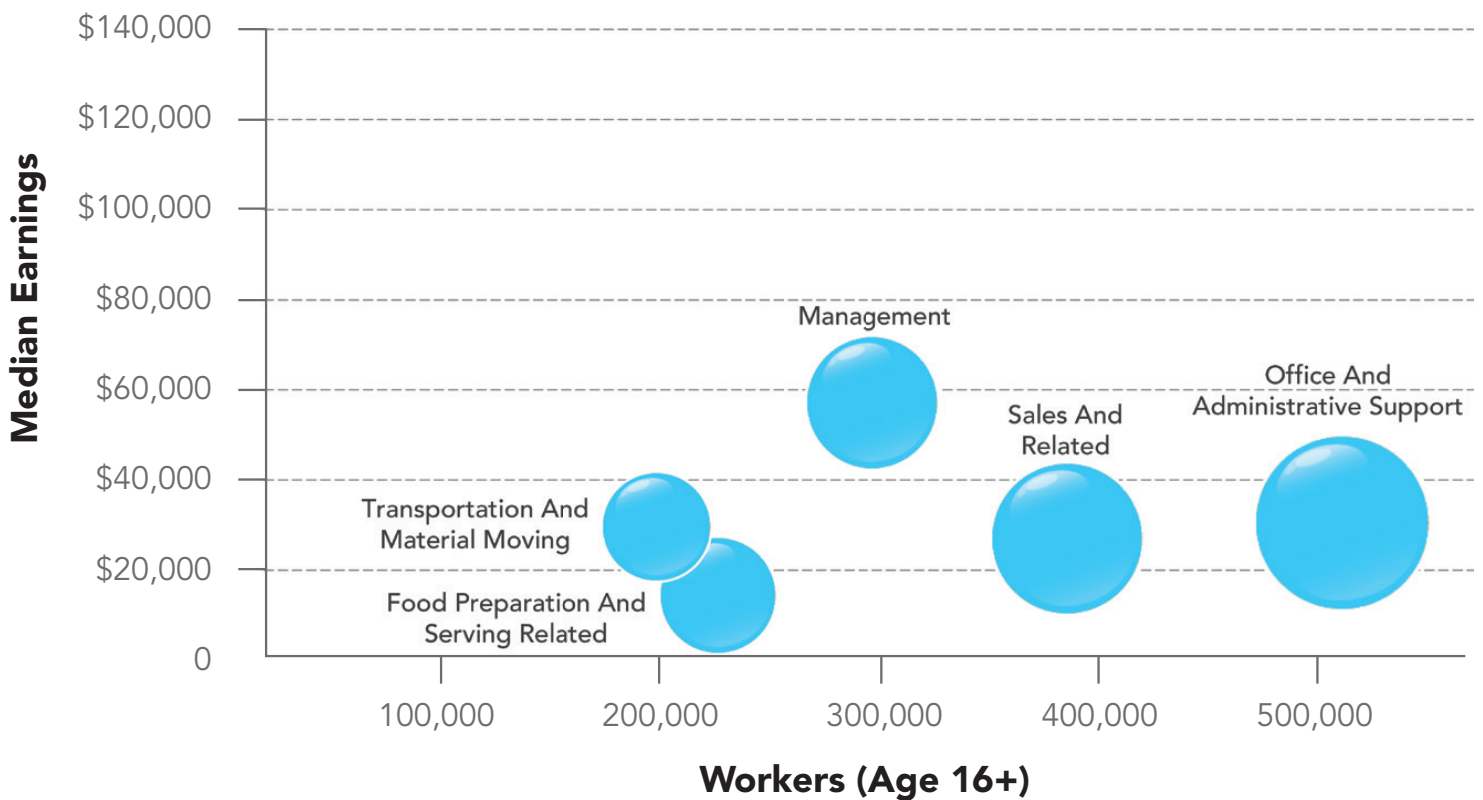
8C LifeMode Group: Middle Ground Bright Young Professionals

Market Profile

- Own retirement savings and student loans.
- Own newer computers (desktop, laptop, or both), iPods, and 2+ TVs.
- Go online and use mobile devices for banking, access YouTube or Facebook, visit blogs, download movies, and play games.
- Use cell phones to text, redeem mobile coupons, listen to music, and check for news and financial information.
- Find leisure going to bars/clubs, attending concerts, going to the beach, and renting DVDs from Redbox or Netflix.
- Enjoy a variety of sports, including backpacking, rock climbing, football, Pilates, running, and yoga.
- Eat out often at fast-food and family restaurants.

OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



8F LifeMode Group: Middle Ground Old and Newcomers

US Households: 2,859,200
Average Household Size: 2.12

Median Age: 39.4
Median Household Income: \$44,900

WHO ARE WE?

This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. Old and Newcomers is composed of neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. They support charity causes and are environmentally conscious. Age is not always obvious from their choices.

OUR NEIGHBORHOOD

- Metropolitan city dwellers.
- Predominantly single households (Index 148), with a mix of married couples (no children); average household size lower at 2.12.
- 55% renter occupied; average rent, \$880, (Index 85).
- 45% of housing units are single-family dwellings; 45% are multiunit buildings in older neighborhoods, built before 1980.
- Average vacancy rate at 11%.

SOCIOECONOMIC TRAITS

- Unemployment is lower at 5.1% (Index 93), with an average labor force participation rate of 62.6%, despite the increasing number of retired workers.
- 32% of households are currently receiving Social Security.
- 31% have a college degree (Index 99), 33% have some college education, 9% are still enrolled in college (Index 121).
- Consumers are price aware and coupon clippers, but open to impulse buys.
- They are attentive to environmental concerns.
- They are more comfortable with the latest technology than buying a car.

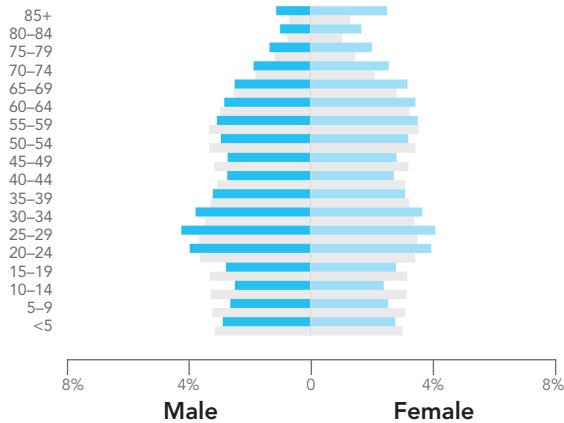
8F LifeMode Group: Middle Ground

Old and Newcomers

AGE BY SEX (Esri data)

Median Age: 39.4 US: 38.2

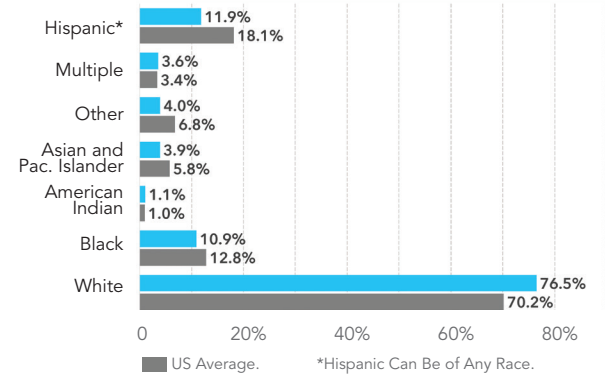
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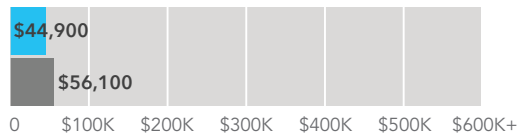
Diversity Index: 52.7 US: 64.0



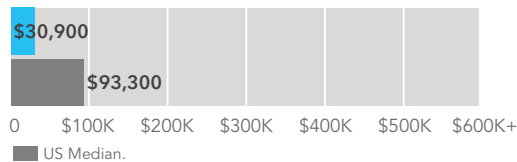
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Median Household Income



Median Net Worth



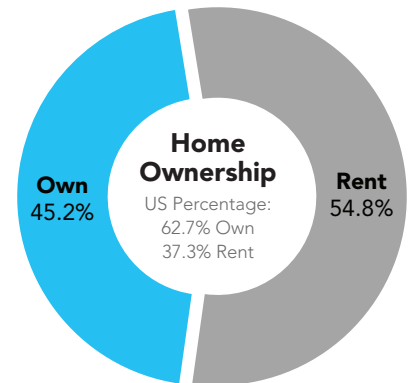
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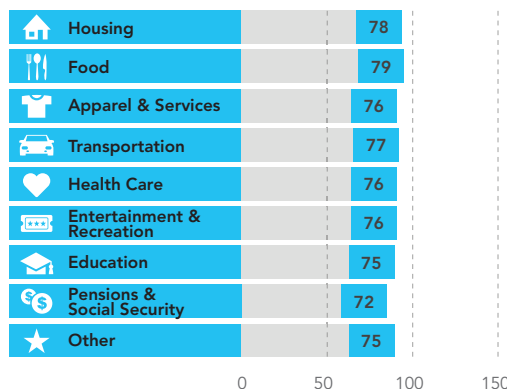
Typical Housing:
Single Family;
Multi-Units

Average Rent:
\$880



AVERAGE HOUSEHOLD BUDGET INDEX

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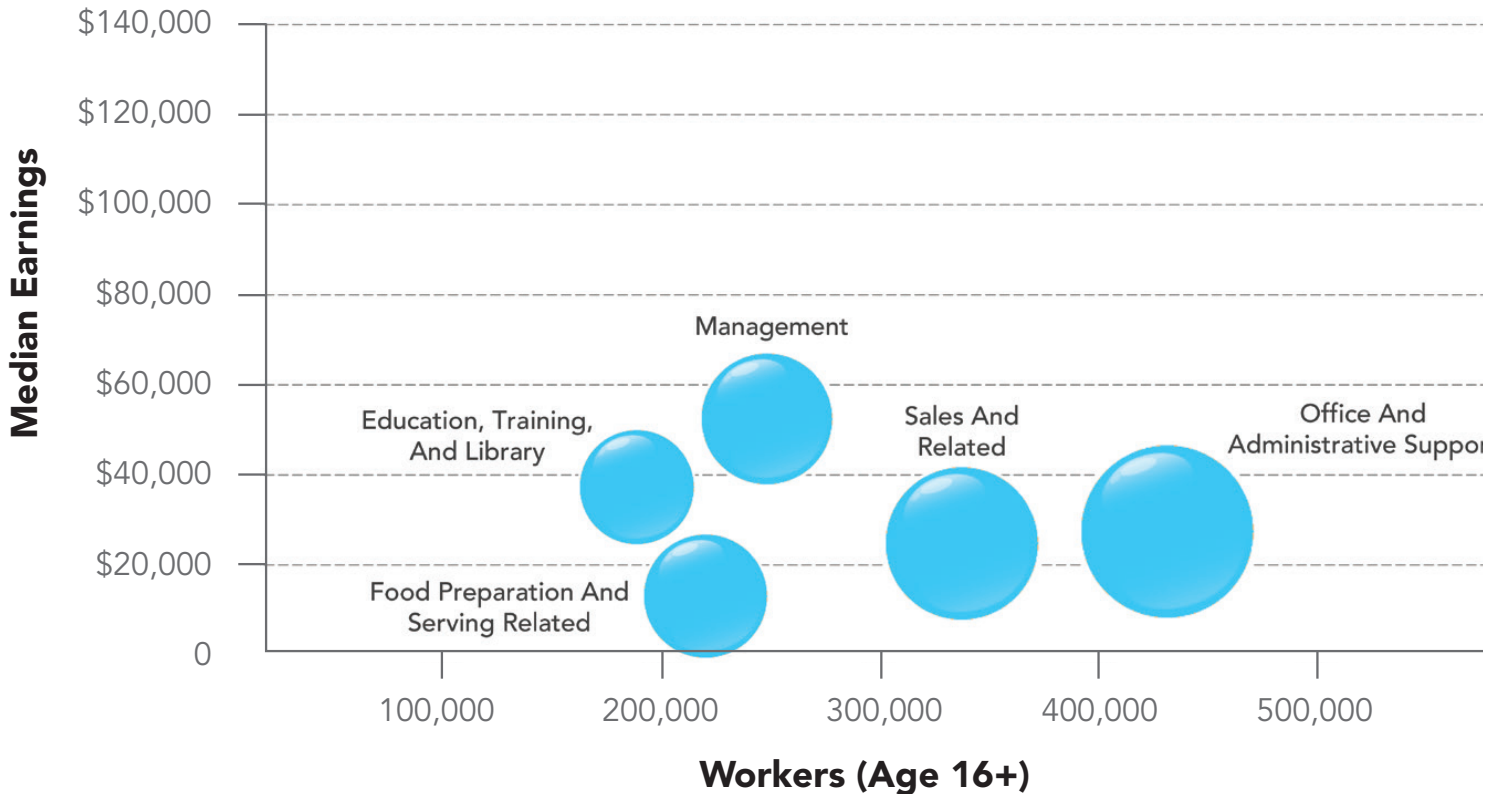
8F LifeMode Group: Middle Ground Old and Newcomers

Market Profile

- Residents have a strong sense of community. They volunteer for charities, help fund raise, and recycle.
- They prefer cell phones to landlines.
- Entertainment features the Internet (employment searches, rating products, updating social media profiles), watching movies at home, listening to country music, and reading the paper.
- Vehicles are basically just a means of transportation.
- Food features convenience, frozen and fast food.
- They do banking as likely in person as online.

OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



5B LifeMode Group: GenXurban In Style

US Households: 3,024,200
Average Household Size: 2.52

Median Age: 48.0
Median Household Income: \$75,000

WHO ARE WE?

In Style denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement.

OUR NEIGHBORHOOD

- City dwellers of large metropolitan areas.
- Married couples, primarily with no children (Index 112) or single households (Index 109); average household size at 2.35.
- Home ownership average at 68% (Index 108); nearly half, 47%, mortgaged (Index 114).
- Primarily single-family homes, in older neighborhoods (built before 1980), with a mix of town homes (Index 132) and smaller (5 –19 units) apartment buildings (Index 110).
- Median home value at \$243,900.
- Vacant housing units at 8.6%.

SOCIOECONOMIC TRAITS

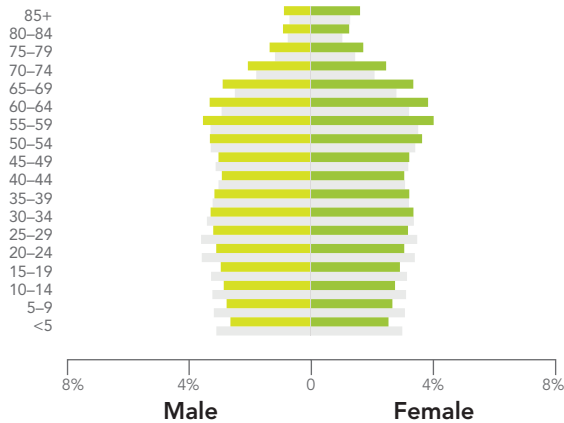
- College educated: 48% are graduates (Index 155); 77% with some college education.
- Low unemployment is at 3.6% (Index 66); higher labor force participation rate is at 67% (Index 108) with proportionately more 2-worker households (Index 110).
- Median household income of \$73,000 reveals an affluent market with income supplemented by investments (Index 142) and a substantial net worth (Index 178).
- Connected and knowledgeable, they carry smartphones and use many of the features.
- Attentive to price, they use coupons, especially mobile coupons.

5B LifeMode Group: GenXurban In Style

AGE BY SEX (Esri data)

Median Age: **42.0** US: 38.2

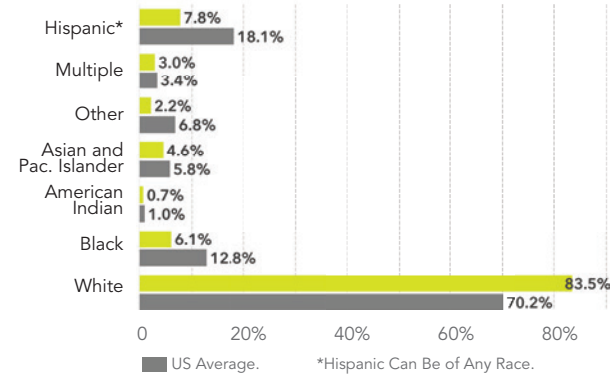
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RACE AND ETHNICITY (Esri data)

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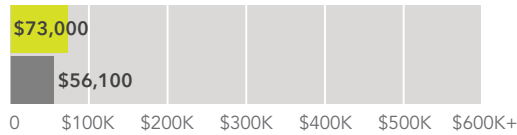
Diversity Index: **39.8** US: 64.0



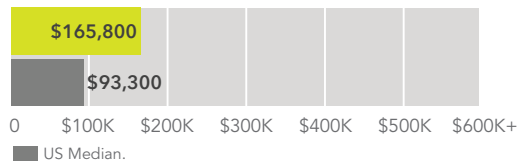
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income



Median Net Worth



HOUSING

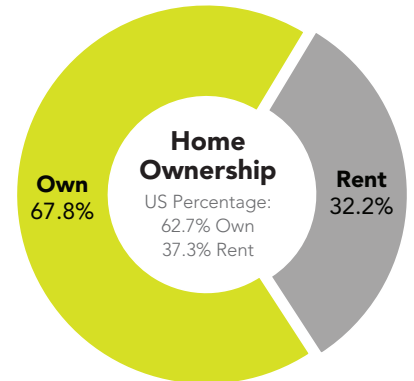
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

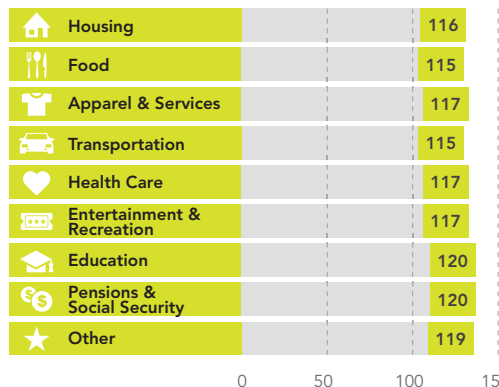
Median Value:
\$243,900

US Median: \$207,300



AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



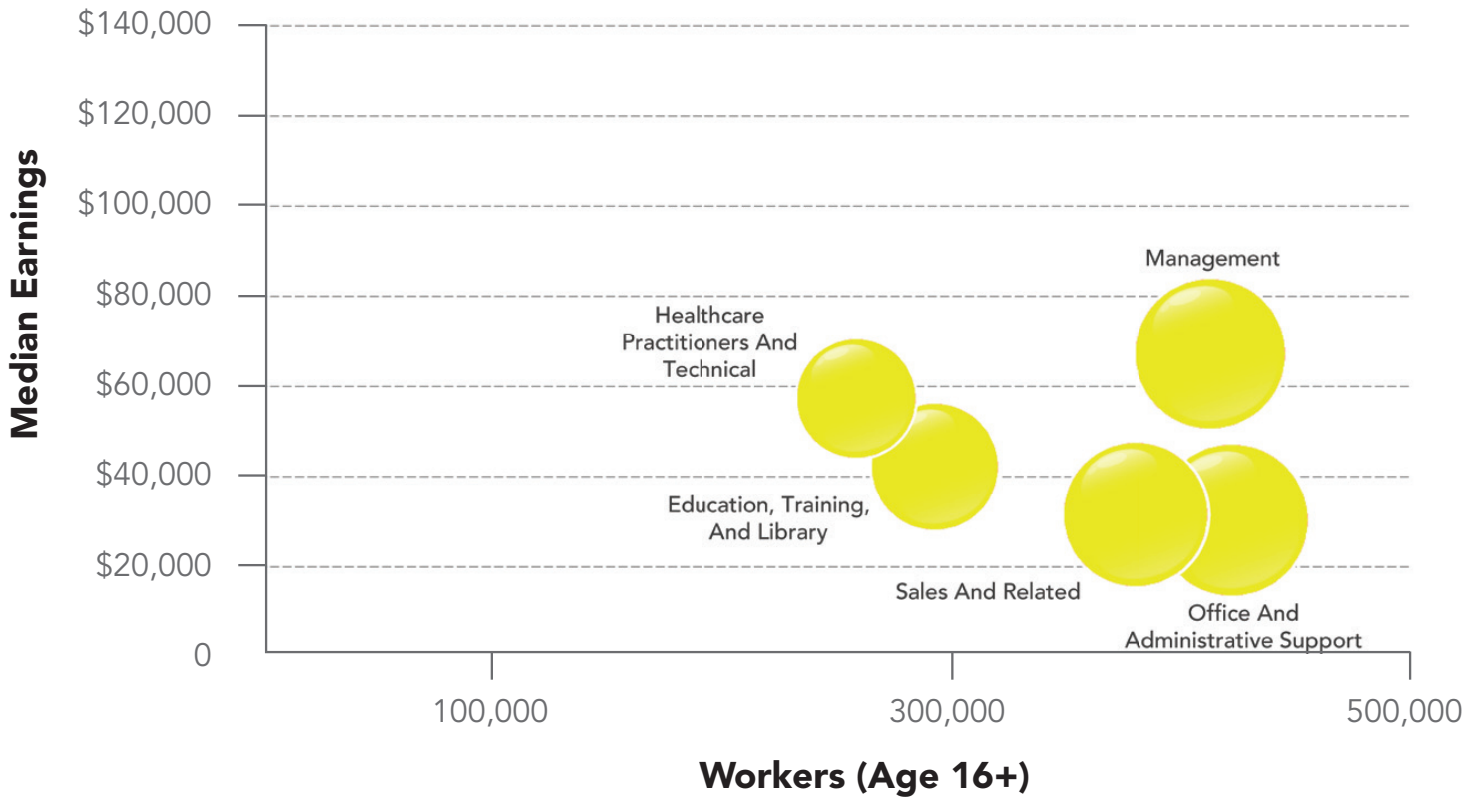
5B LifeMode Group: GenXurban In Style

Market Profile

- Partial to late model SUVs: compact SUVs are gaining popularity.
- Homes integral part of their style; invest in home remodeling/maintenance, DIY or contractors; housekeeping hired.
- Prefer organic foods, including growing their own vegetables.
- Financially active, own a variety of investments often managed by a financial planner.
- Meticulous planners, both well insured and well invested in retirement savings.
- Generous with support of various charities and causes.
- Actively support the arts, theater, concerts, and museums.

OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



6A LifeMode Group: Cozy Country Living Green Acres

US Households: 3,923,400
Average Household Size: 2.70

Median Age: 43.9
Median Household Income: \$76,800

WHO ARE WE?

The Green Acres lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.

OUR NEIGHBORHOOD

- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 15 years.
- Single-family, owner-occupied housing, with a median value of \$235,500.
- An older market, primarily married couples, most with no children.

SOCIOECONOMIC TRAITS

- Education: More than 60% are college educated.
- Unemployment is low at 3.8% (Index 70); labor force participation rate is high at 66.8% (Index 107).
- Income is derived not only from wages and salaries but also from self-employment (more than 13% of households), investments (27% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.

6A LifeMode Group: Cozy Country Living Green Acres

AGE BY SEX (Esri data)

Median Age: 43.9 US: 38.2

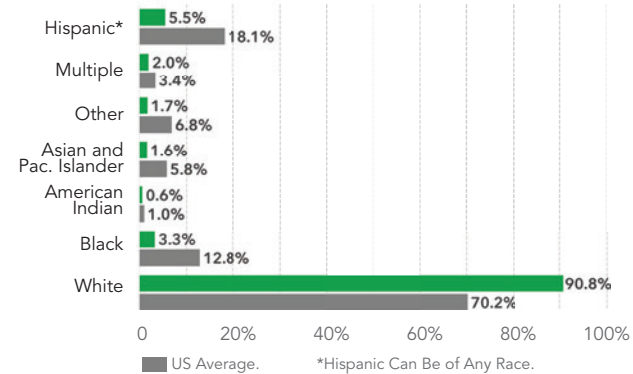
■ Indicates US



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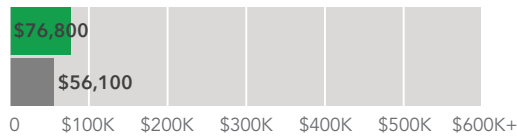
Diversity Index: 26.0 US: 64.0



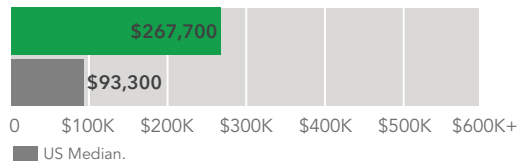
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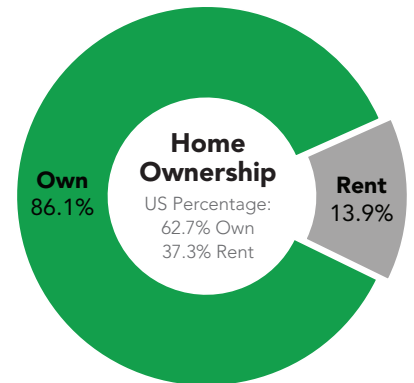
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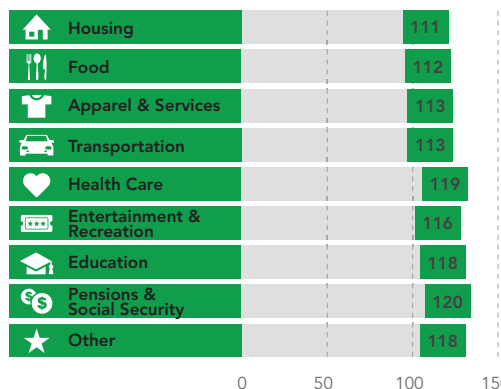
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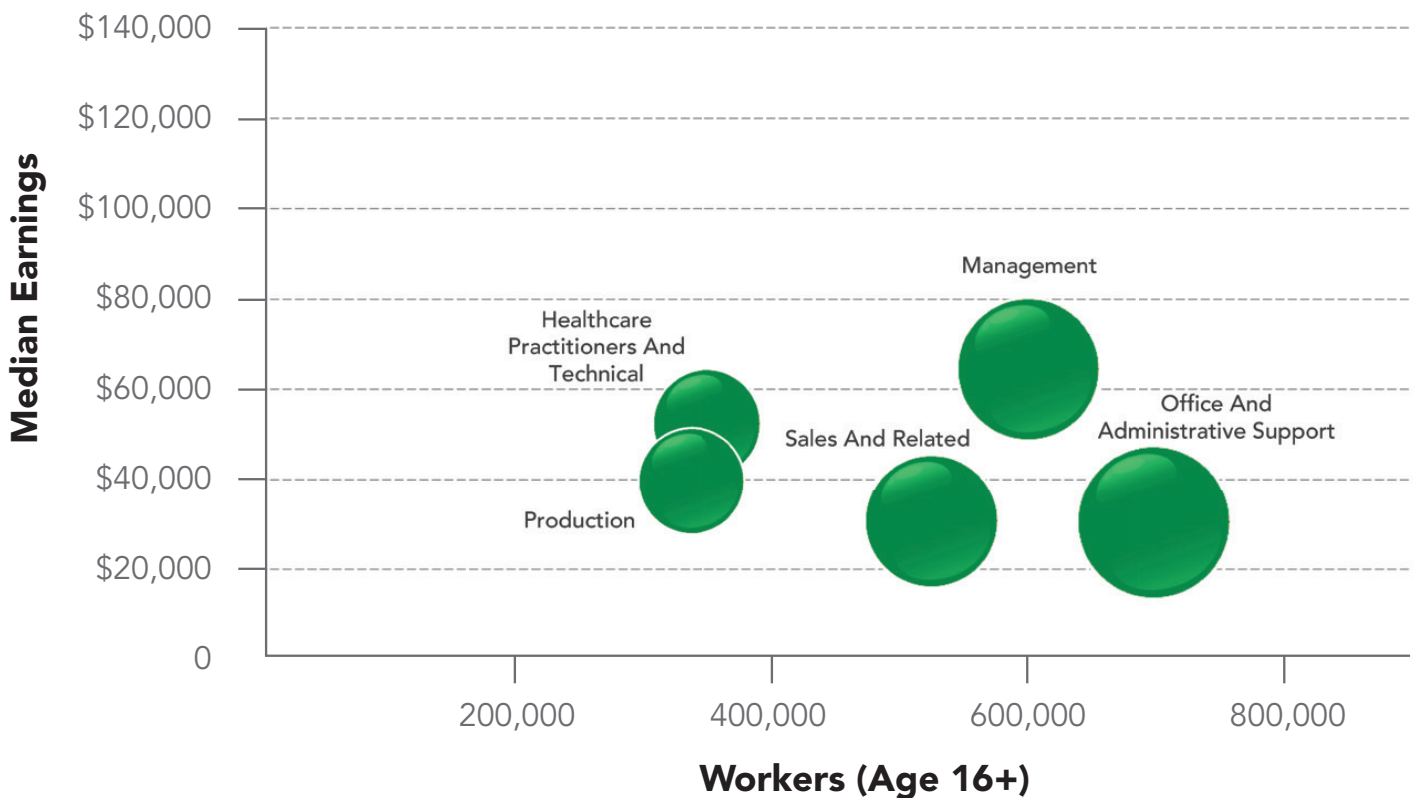
6A LifeMode Group: Cozy Country Living Green Acres

Market Profile

- Purchasing choices reflect Green Acres' residents country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles, preferably late model.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- Green Acres residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from charitable to veterans' clubs.

OCCUPATION BY EARNINGS

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About The Retail Coach®

The Retail Coach is a national retail recruitment and development firm that combines strategy, technology, and creative expertise to develop and deliver high-impact retail recruitment and development plans to local governments, chambers of commerce, economic development organizations and private developers.

Through its unique Retail360® Process, The Retail Coach offers a dynamic system of products and services that better enable communities to maximize their retail development potential.

Retail:360® Process

Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms' offerings by combining current national and statewide demographics and trend data with real-world, "on-the-ground" information gathered through extensive visits to our clients' communities. Every community is different, and there is no "one size fits all" retail recruitment solution. Compiling the gathered data into client-tailored information packets that are uniquely designed for, and targeted to, specific retailers and restaurants who meet the community's needs help assure our clients that they are receiving the latest and best information for targeted retail recruitment efforts – all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail:360® Process assures that communities get timely, accurate and relevant information. Translating that data into the information that retailers need and seek assures our clients even better possibilities for tremendous retail growth and success.





The**RetailCoach**.®

ACKNOWLEDGMENTS

The observations, conclusions and recommendations contained in this study are solely those of The Retail Coach, LLC and should not be construed to represent the opinions of others, including its clients, or any other entity prior to such entity's express approval of this study.

All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions.

Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Environics Analytics, ESRI, U.S. Census Bureau, Economy.com, Placer.AI, Spatial Insights Inc., Urban Land Institute, CensusViewer.com, International Council of Shopping Centers, and/or U.S. Bureau of Labor and Statistics. To better represent current data, where applicable, portions of estimated actual sales may be calculated using an average sales per square foot model. Mapping data is provided by Google, Nielsen, ESRI and/or Microsoft Corporation.

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