TheRetailCoach®

PRIMARY RETAIL TRADE AREA PSYCHOGRAPHIC PROFILE

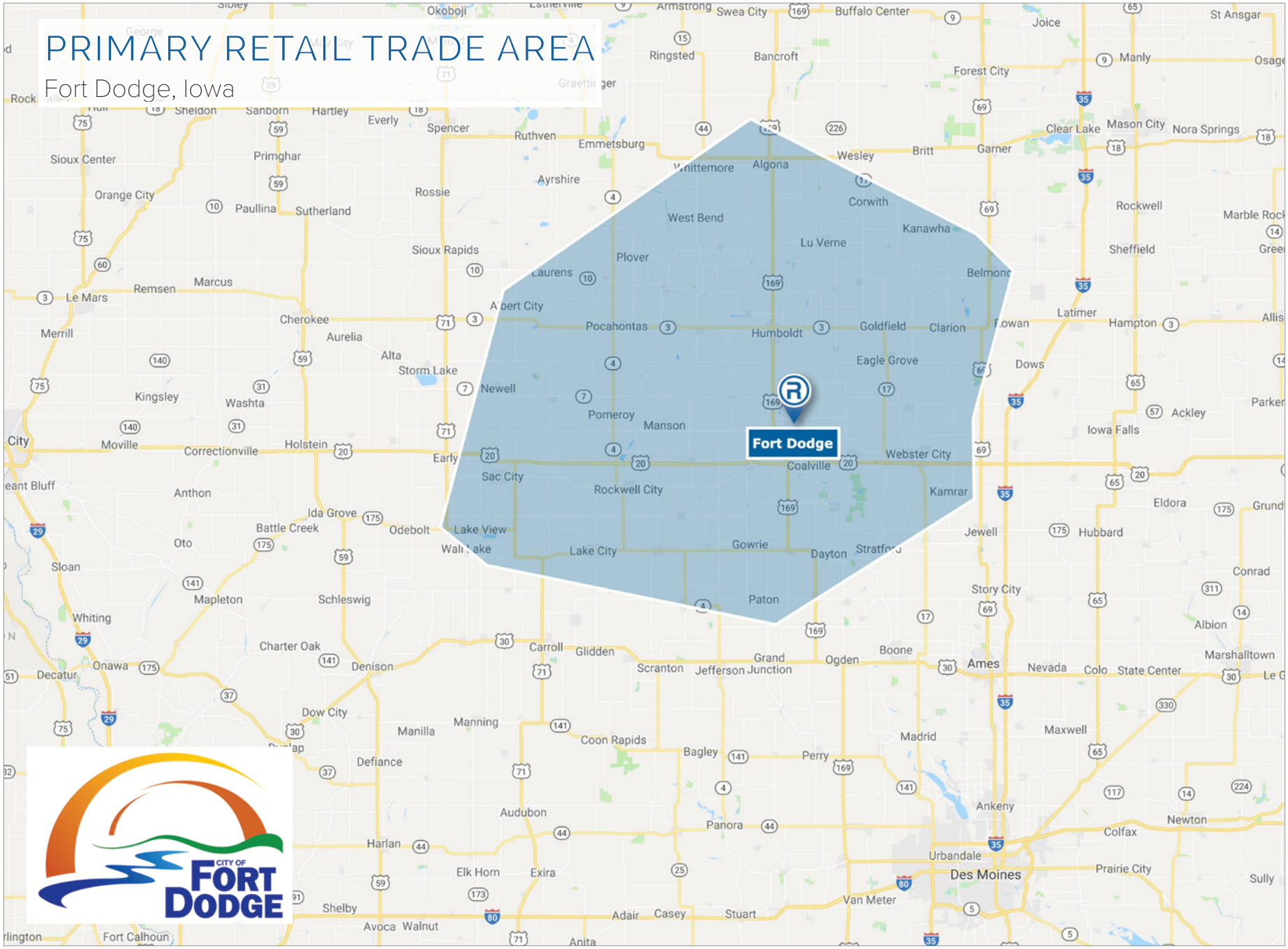
Fort Dodge, Iowa

Prepared for
City of Fort Dodge, Iowa
October 2019

CITY OF FORT DODGE

PRIMARY RETAIL TRADE AREA

Fort Dodge, Iowa



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TAPESTRY SEGMENTATION PROFILE

+ WHAT IS TAPESTRY SEGMENTATION?

Tapestry Segmentation is a market segmentation system that classifies US neighborhoods based on their socioeconomic and demographic compositions. Tapestry is a system for classifying consumers and constituents using all the variables that can distinguish consumer behavior, from household characteristics such as income and family type to personal traits like age, education, or employment and even housing choices.

Tapestry Segmentation classifies US neighborhoods into 67 distinct market segments. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses—distinct behavioral market segments.

+ WHO SHOULD USE TAPESTRY SEGMENTATION?

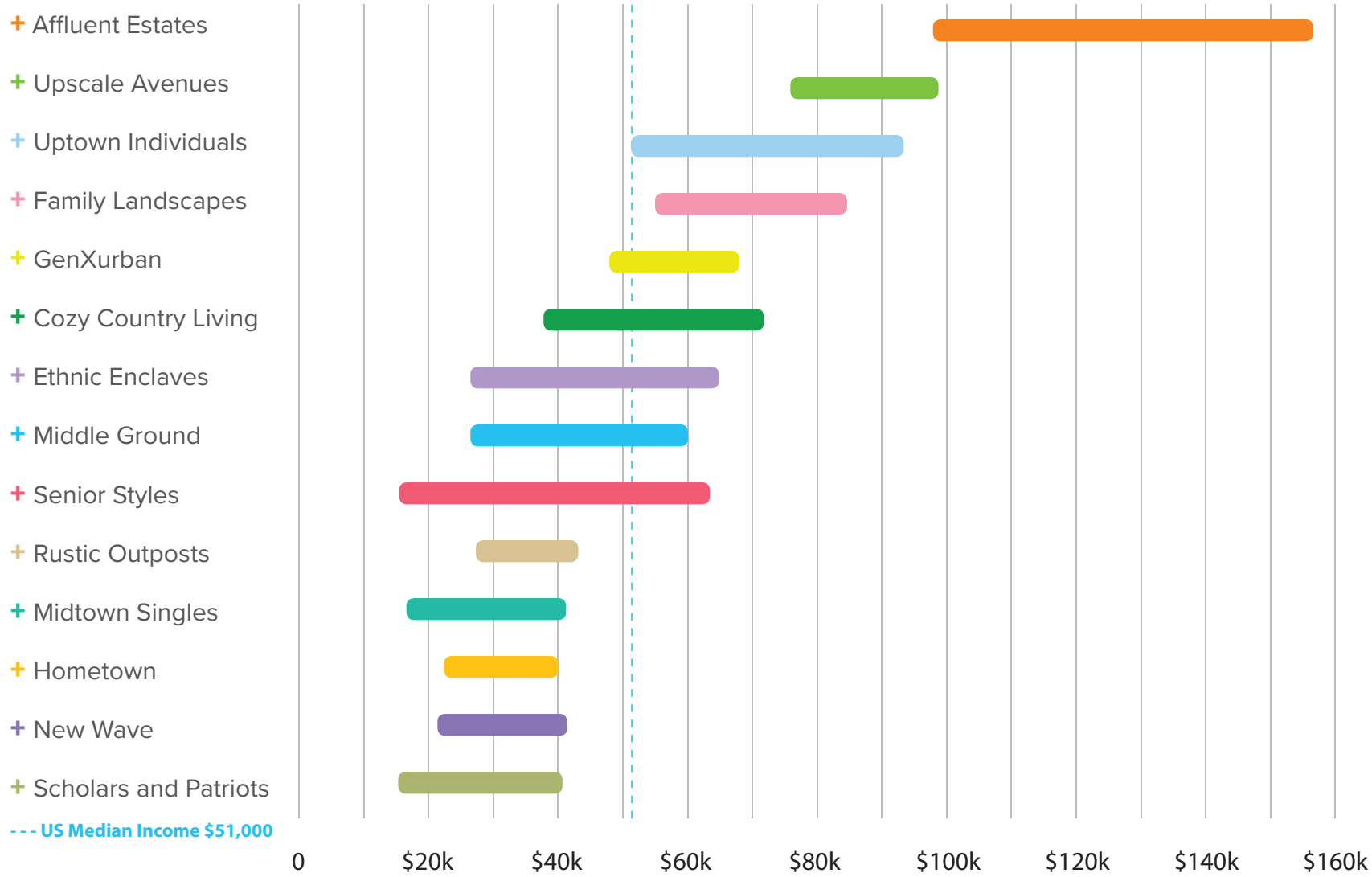
All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The versatility and predictive power of Tapestry Segmentation allow users to integrate their own data or national consumer surveys into Tapestry Segmentation to identify their best market segments and reach them through the most effective channels.

+ TAPESTRY SEGMENTATION SUMMARY GROUPS

Esri's Tapestry Segmentation provides a robust, powerful portrait of the 67 US consumer markets. To provide a broader view of these 67 segments, Esri combined them into 14 LifeMode Summary Groups based on lifestyle and lifestage composition.

L1 Affluent Estates
L2 Upscale Avenues
L3 Uptown Individuals
L4 Family Landscapes
L5 GenXurban
L6 Cozy Country Living
L7 Ethnic Enclaves
L8 Middle Ground
L9 Senior Styles
L10 Rustic Outposts
L11 Midtown Singles
L12 Hometown
L13 New Wave
L14 Scholars and Patriots

INCOME RANGE OF LIFEMODE SUMMARY GROUPS



PRIMARY RETAIL TRADE AREA • LIFEMODE SUMMARY GROUPS MAP

Fort Dodge, Iowa

+ 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

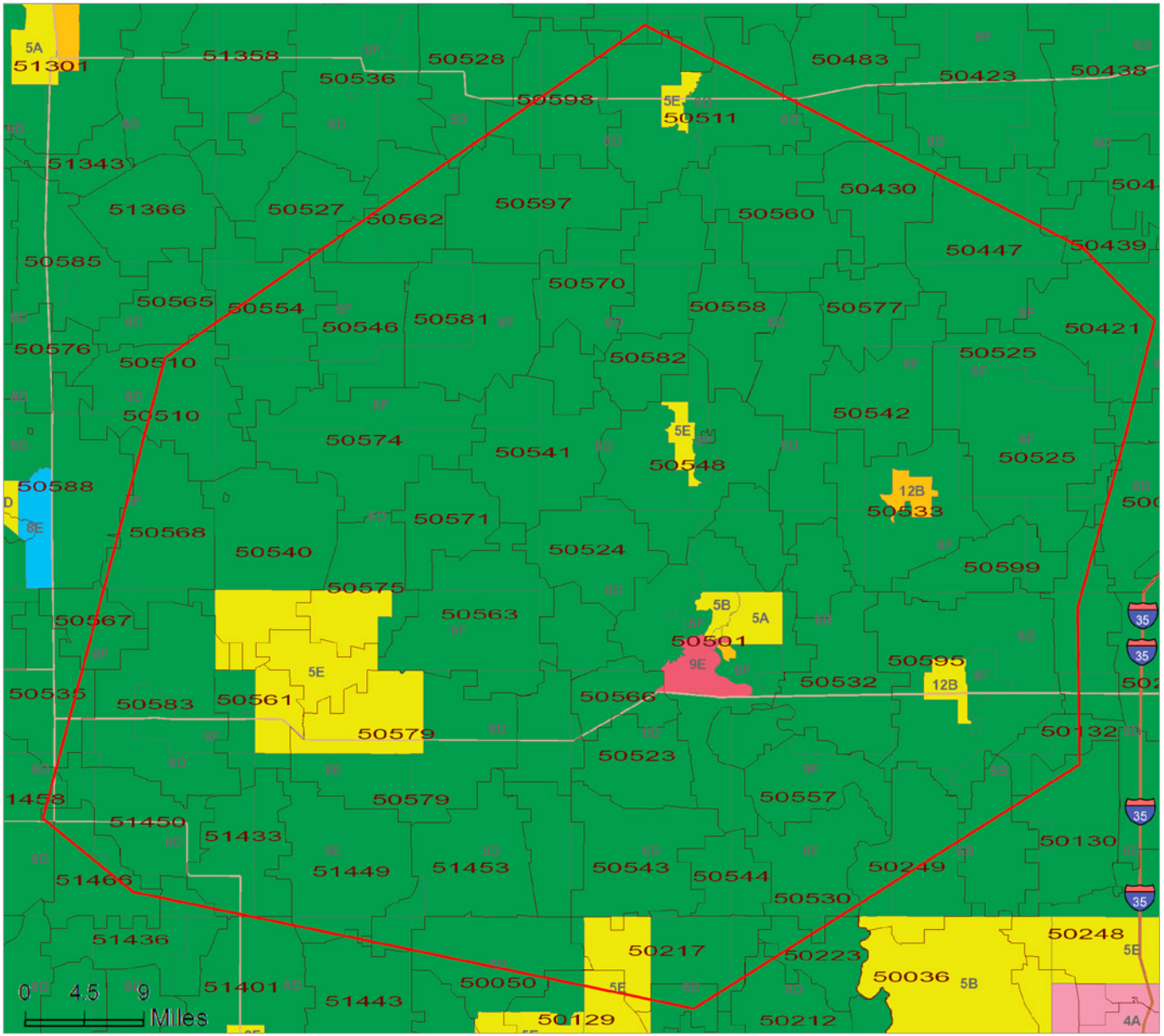
+ L10 RUSTIC OUTPOSTS
Country life with older families, older homes

+ 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 • TOP TAPESTRY SEGMENTS

Fort Dodge, Iowa

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Heartland Communities (6F)	29.0%	29.0%	2.3%	2.3%	1269
2	Prairie Living (6D)	27.0%	56.0%	1.1%	3.4%	2,538
3	Traditional Living (12B)	10.8%	66.8%	1.9%	5.3%	562
4	Midlife Constants (5E)	9.3%	76.1%	2.5%	7.8%	377
5	Rustbelt Traditions (5D)	5.1%	81.2%	2.2%	10.0%	232
	Subtotal	**81.2%**		**10.0%**		
6	Retirement Communities (9E)	3.4%	84.6%	1.2%	11.2%	281
7	Salt of the Earth (6B)	3.1%	87.7%	2.9%	14.1%	110
8	Comfortable Empty Nesters (5A)	2.8%	90.5%	2.4%	16.5%	116
9	Small Town Simplicity (12C)	2.8%	93.3%	1.8%	18.3%	149
10	In Style (5B)	1.7%	95.0%	2.2%	20.5%	76
	Subtotal	**13.8%**		**10.5%**		
11	Rural Resort Dwellers (6E)	1.3%	96.3%	1.0%	21.5%	132
12	Hardscrabble Road (8G)	1.1%	97.4%	1.2%	22.7%	95
13	Social Security Set (9F)	1.0%	98.4%	0.8%	23.5%	125
14	Set to Impress (11D)	0.7%	99.1%	1.4%	24.9%	54
15	Old and Newcomers (8F)	0.7%	99.8%	2.3%	27.2%	31
	Subtotal	**4.8%**		**6.7%**		
	Total	**100.0%**		**27.3%**		**367**

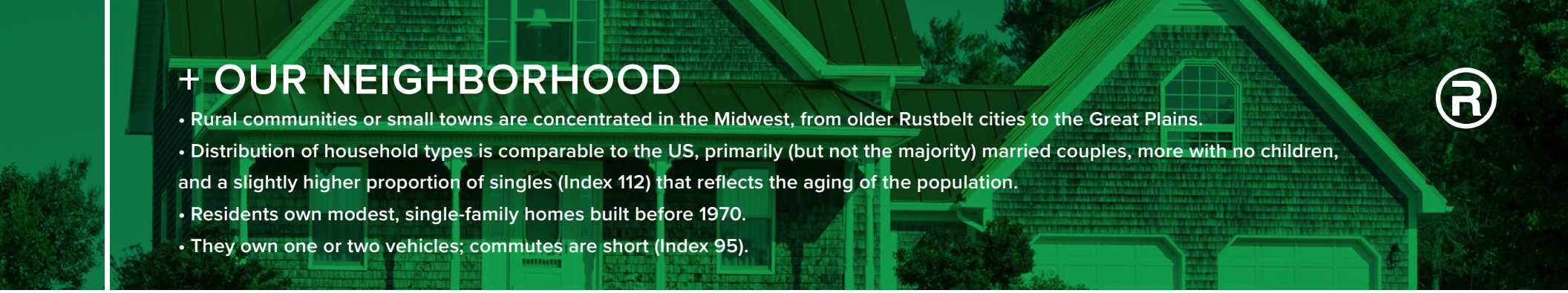
LifeMode Group • Cozy Country Living

6F HEARTLAND COMMUNITIES

Well settled and close-knit, Heartland Communities are semi-rural and semiretired.

These older householders are primarily homeowners, and many have paid off their mortgages. Their children have moved away, but they have no plans to leave their homes. Their hearts are with the country; they embrace the slower pace of life here but actively participate in outdoor activities and community events. Traditional and patriotic, these residents support their local businesses, always buy American, and favor domestic driving vacations over foreign plane trips.

US Household // 2,864,000
Average Household Size // 2.38
Median Age // 41.5
Median Household Income // $39,000



+ OUR NEIGHBORHOOD

- **Rural communities or small towns are concentrated in the Midwest, from older Rustbelt cities to the Great Plains.**
- **Distribution of household types is comparable to the US, primarily (but not the majority) married couples, more with no children, and a slightly higher proportion of singles (Index 112) that reflects the aging of the population.**
- **Residents own modest, single-family homes built before 1970.**
- **They own one or two vehicles; commutes are short (Index 95).**

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Traditional in their ways, residents of Heartland Communities choose to bank and pay their bills in person and purchase insurance from an agent.
- Most have high-speed Internet access at home or on their cell phone but aren't ready to go paperless.
- Many residents have paid off their home mortgages but still hold auto loans and student loans. Noninterest checking accounts are common.
- To support their local community, residents participate in public activities.
- Home remodeling is not a priority, but homeowners do tackle necessary maintenance work on their cherished homes. They have invested in riding lawn mowers to maintain their larger yards.
- They enjoy country music and watch CMT.
- Motorcycling, hunting, and fishing are popular; walking is the main form of exercise.
- To get around these semirural communities, residents prefer domestic trucks or SUVs.
- They prefer to travel in the US and favor the convenience of packaged deals.

+ SOCIOECONOMIC TRAITS

- Retirees in this market depress the average labor force participation rate to less than 60% (Index 95), but the unemployment rate is comparable to the US.
- More workers are white collar than blue collar; more skilled than unskilled.
- The rural economy of this market provides employment in the manufacturing, construction, and agriculture industries.
- These are budget savvy consumers; they stick to brands they grew up with and know the price of goods they purchase. Buying American is important.
- Daily life is busy, but routine. Working on the weekends is not uncommon.
- Residents trust TV and newspapers more than any other media.
- Skeptical about their financial future, they stick to community banks and low-risk investments.

+ 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:
$89,000
US Median $177,000

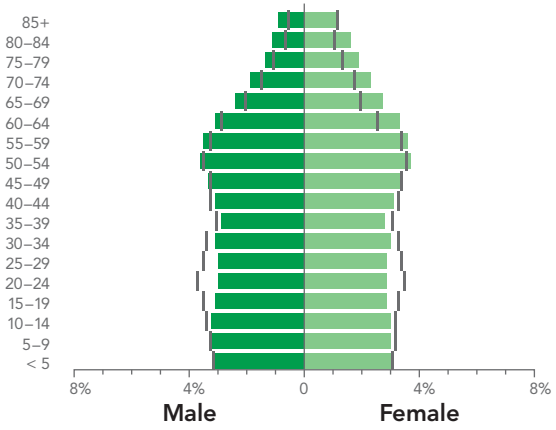
HEARTLAND COMMUNITES

LifeMode Group • Cozy Country Living

AGE BY SEX (Esri data)

Median Age: 41.5 US: 37.6

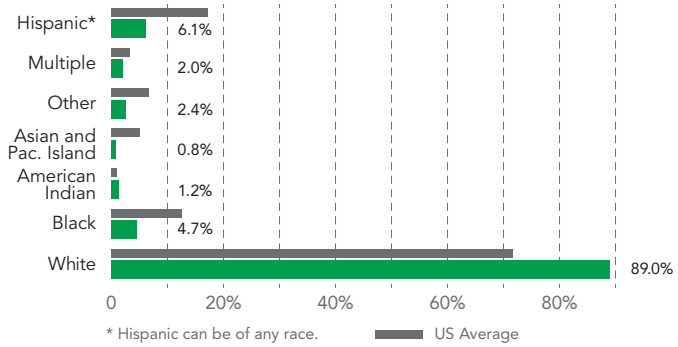
Indicates US



RACE AND ETHNICITY (Esri data)

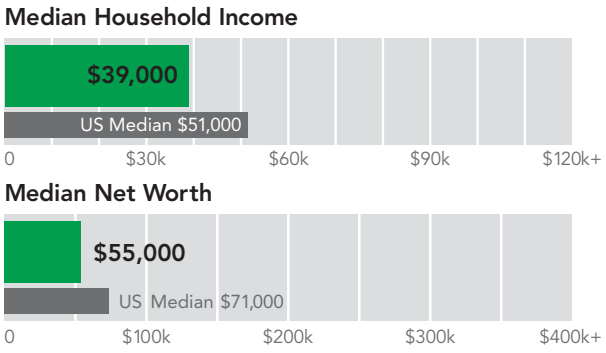
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 29.6 US: 62.1



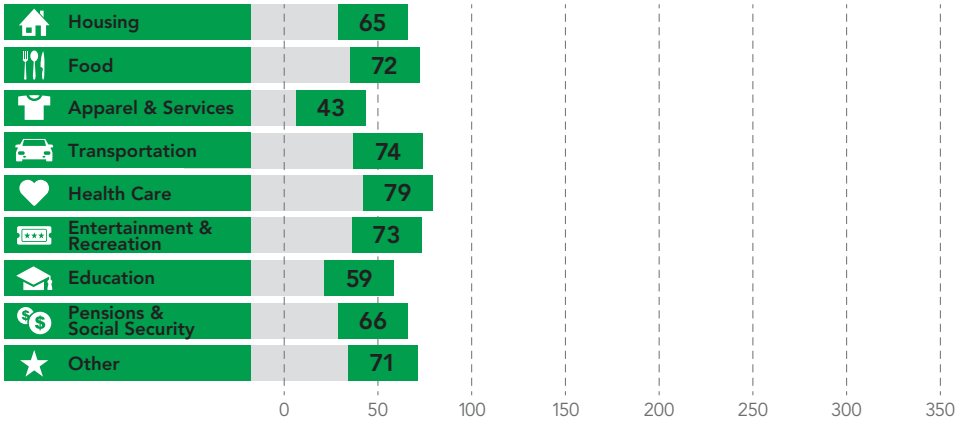
INCOME AND NET WORTH

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.



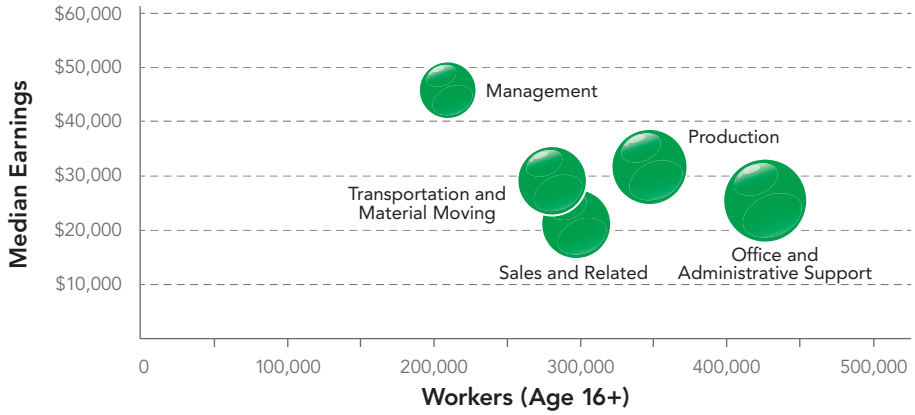
AVERAGE HOUSEHOLD BUDGET INDEX

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.



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.



LifeMode Group • Cozy Country Living

6D PRAIRIE LIVING

Prairie Living is Tapestry Segmentation's most rural market, comprising about 1 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.

US Household // 1,307,000
Average Household Size // 2.50
Median Age // 43.4
Median Household Income // $51,000

+ 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 225).
- Higher percentage of vacant housing units is at 16% (Index 137).
- Most households own 2 or 3 vehicles; this is the highest ranked market for owning 4 or more vehicles.

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- 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 home service, fishing/hunting, and automotive magazines.
- They contribute to religious organizations and belong to religious clubs.
- Walmart is a favorite shopping stop; Subway is a favorite eating spot.

+ SOCIOECONOMIC TRAITS

- Half have completed some college education or hold a degree.
- At 4.1%, the unemployment rate is less than half the US rate.
- Labor force participation rate slightly higher at 66%.
- Wage and salary income for 73% of households plus self-employment income for 27% (Index 242).
- 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.

+ HOUSING

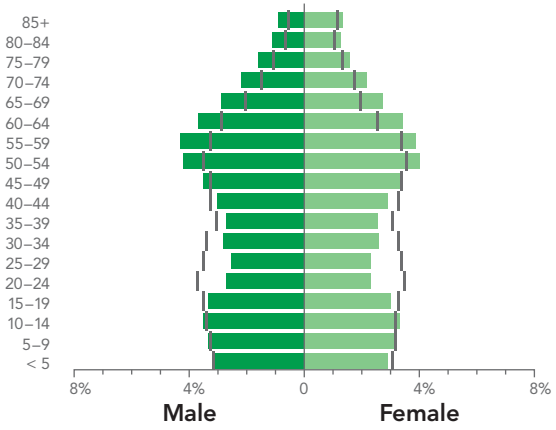
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.

Typical Housing:
Single Family
Median Value:
$125,000
US Median $177,000

AGE BY SEX (Esri data)

Median Age: 43.4 US: 37.6

Indicates US



RACE AND ETHNICITY (Esri data)

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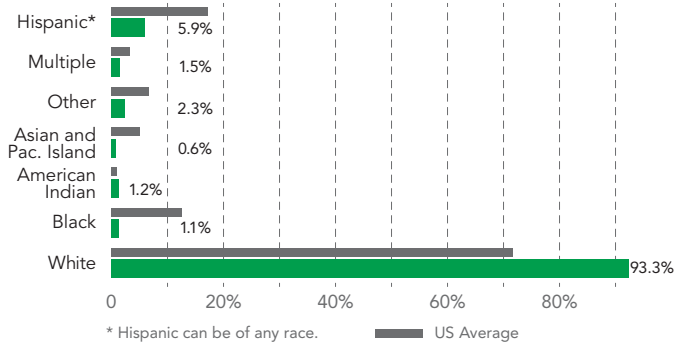
Diversity Index: 22.6 US: 62.1



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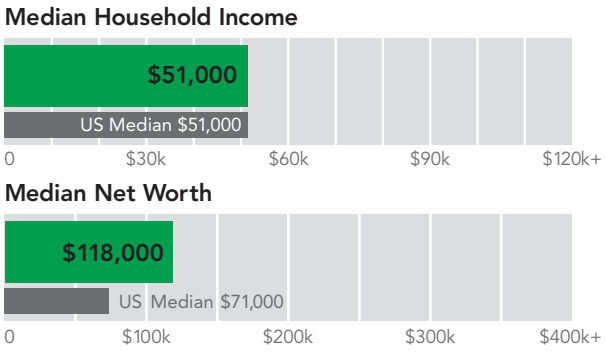

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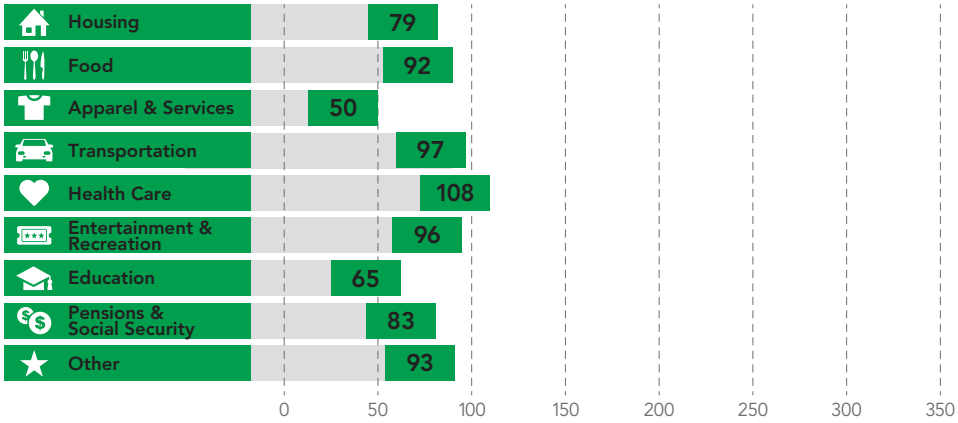

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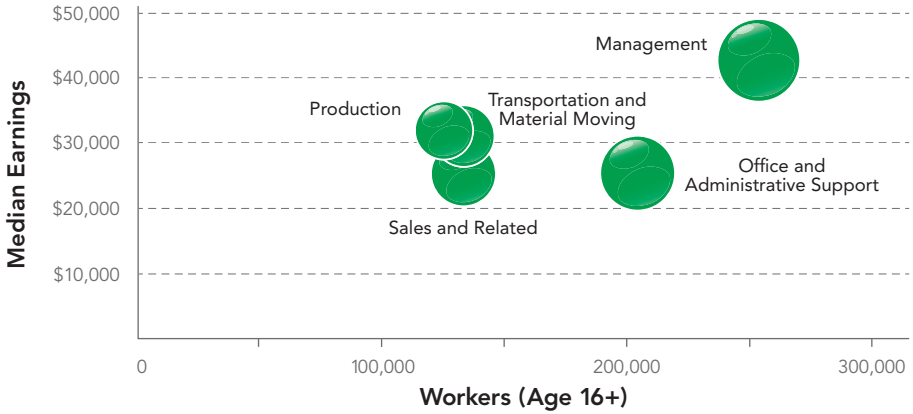

LifeMode Group • Hometown

12B TRADITIONAL LIVING

Residents in this segment live primarily in low-density, settled neighborhoods in the Midwest.

The households are a mix of married-couple families and singles. Many families encompass two generations who have lived and worked in the community; their children are likely to follow suit. The manufacturing, retail trade, and health care sectors are the primary sources of employment for these residents. This is a younger market—beginning householders who are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun.

US Household // 2,369,000
Average Household Size // 2.50
Median Age // 34.8
Median Household Income // $37,000

+ OUR NEIGHBORHOOD

• Married couples are the dominant household type, but fewer than expected from the younger age profile and fewer with children (Index 79); however, there are higher proportions of single-parent (Index 146) and single-person households (Index 112).
• Average household size is slightly lower at 2.50.
• Homes are primarily single family or duplexes in older neighborhoods, built before 1940 (Index 183).
• Most neighborhoods are located in lower-density urban clusters of metro areas throughout the Midwest and South.
• Average commuting time to work is slightly shorter (Index 88).
• Households have one or two vehicles.

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

• They shop for groceries at discount stores such as Walmart supercenters; Kmart is also a favorite for apparel and sundry household and personal care products.

• Convenience stores are commonly used for fuel or picking up incidentals like lottery tickets.

• They tend to carry credit card balances, have student loans, and pay bills in person.

• Half of households have abandoned landlines for cell phones only.

• They watch their favorite channels including QVC, CMT, and Game Show Network.

• They're fast food devotees.

• They enjoy outdoor activities such as camping and taking trips to the zoo.

+ SOCIOECONOMIC TRAITS

• Over 70% have completed high school or some college.

• Unemployment is higher at 10.9% (Index 127); labor force participation is also a bit higher at 64.6%.

• Over three quarters of households derive income from wages and salaries, augmented by Supplemental Security Income (Index 122) and public assistance (Index 149).

• Cost-conscious consumers that are comfortable with brand loyalty, unless the price is too high.

• Connected and comfortable with the Internet, they are more likely to participate in online gaming or to access dating websites.

• TV is seen as the most trusted media.

+ HOUSING

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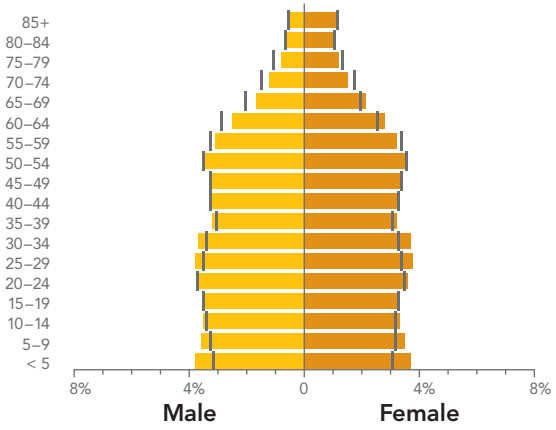
Typical Housing:
Single Family
Median Value:
$79,000
US Median: $177,000

AGE BY SEX (Esri data)

Median Age: 34.8 US: 37.6

Indicates US



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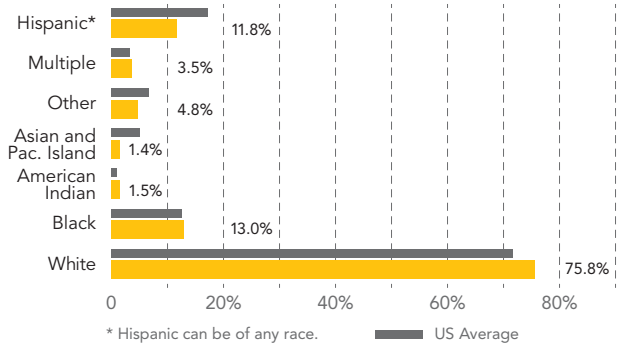
Diversity Index: 53.1 US: 62.1



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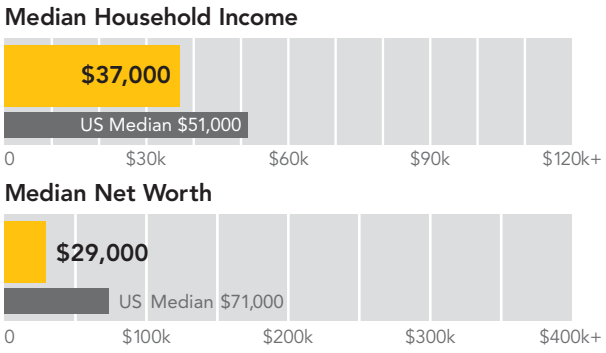

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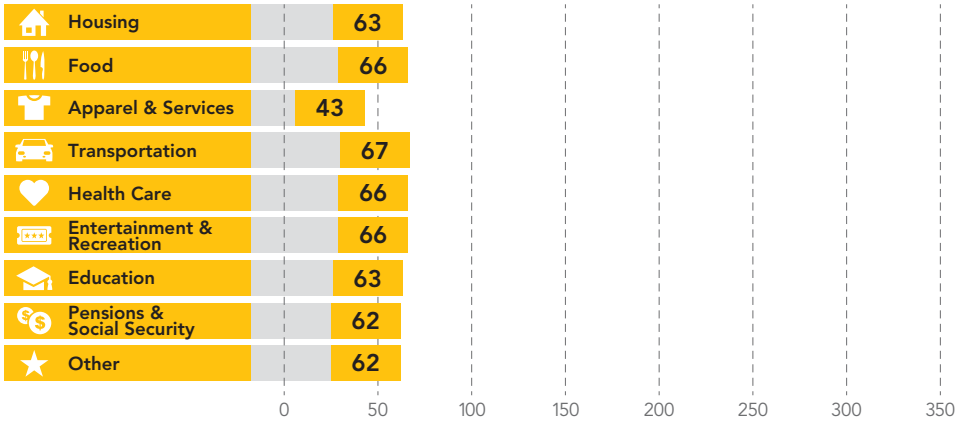

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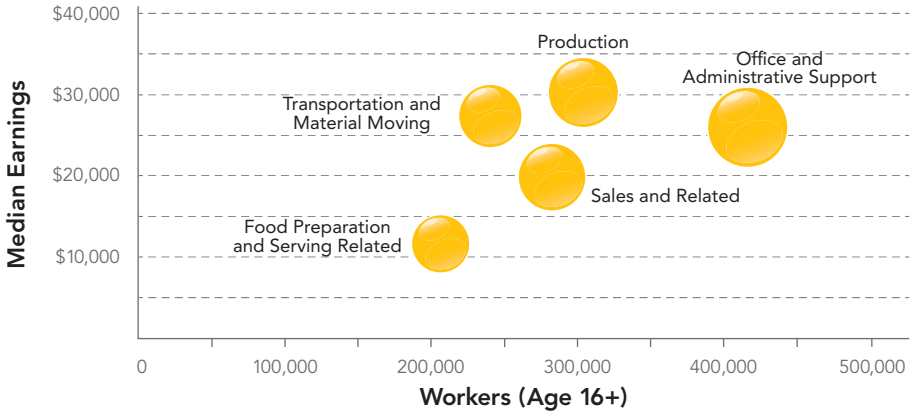


LifeMode Group • GenXurban

5E MIDLIFE CONSTANTS

Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth.

Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

US Household // 3,043,000
Average Household Size // 2.30
Median Age // 45.9
Median Household Income // $48,000

+ OUR NEIGHBORHOOD

- Older homes (most built before 1980) found in the suburban periphery of smaller metropolitan markets.
- Primarily married couples, with a growing share of singles.
- Settled neighborhoods with slow rates of change and residents that have lived in the same house for years.
- Single-family homes, less than half still mortgaged, with a median home value of $141,000 (Index 80).

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Prefer practical vehicles like SUVs and trucks (domestic, of course).
- Sociable, church-going residents belonging to fraternal orders, veterans' clubs and charitable organizations and do volunteer work and fund-raising.
- Contribute to arts/cultural, educational, political, and social services organizations.
- DIY homebodies that spend on home improvement and gardening.
- Media preferences: country or Christian channels.
- Leisure activities include scrapbooking, movies at home, reading, fishing, and golf.

+ SOCIOECONOMIC TRAITS

- Education: 64% have a high school diploma or some college.
- Unemployment is lower in this market at 7.4% (Index 86), but so is the labor force participation rate (Index 89).
- Almost 42% of households are receiving Social Security (Index 150); 28% also receive retirement income (Index 160).
- Traditional, not trendy; opt for convenience and comfort, not cutting-edge. Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.
- Radio and newspapers are the media of choice (after television).

+ HOUSING

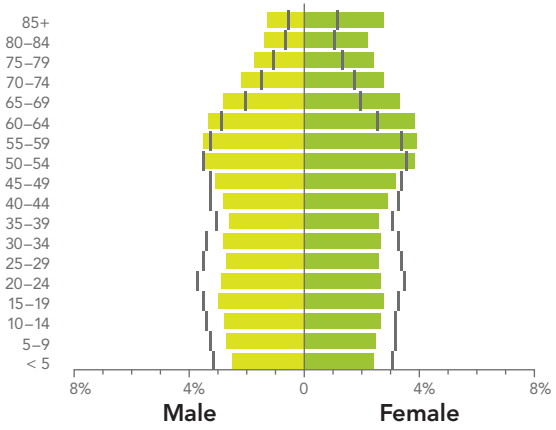
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.

Typical Housing:
Single Family
Median Value:
$141,000
US Median $177,000

AGE BY SEX (Esri data)

Median Age: 45.9 US: 37.6

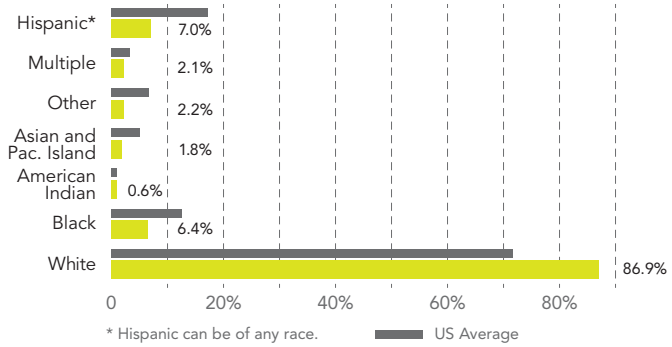
Indicates US



RACE AND ETHNICITY (Esri data)

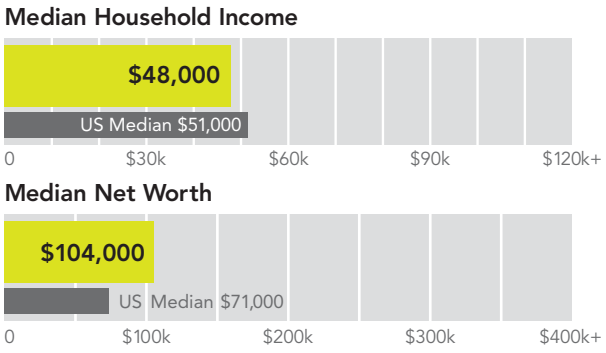
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 34.0 US: 62.1



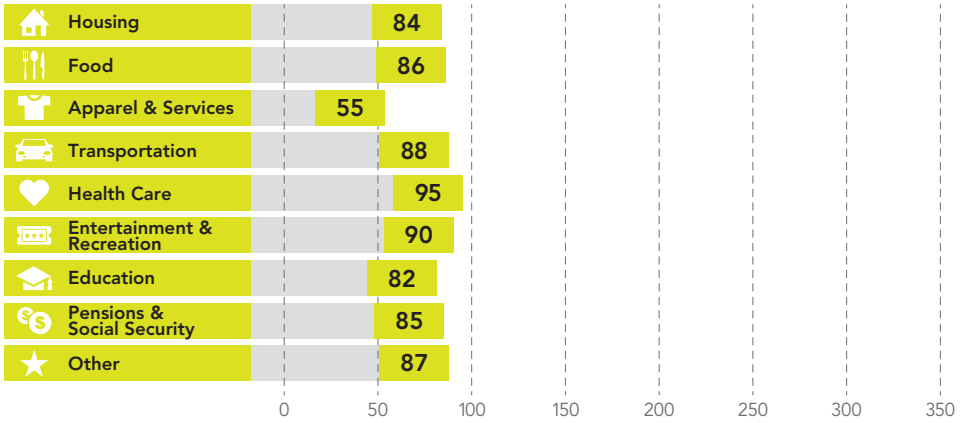
INCOME AND NET WORTH

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.



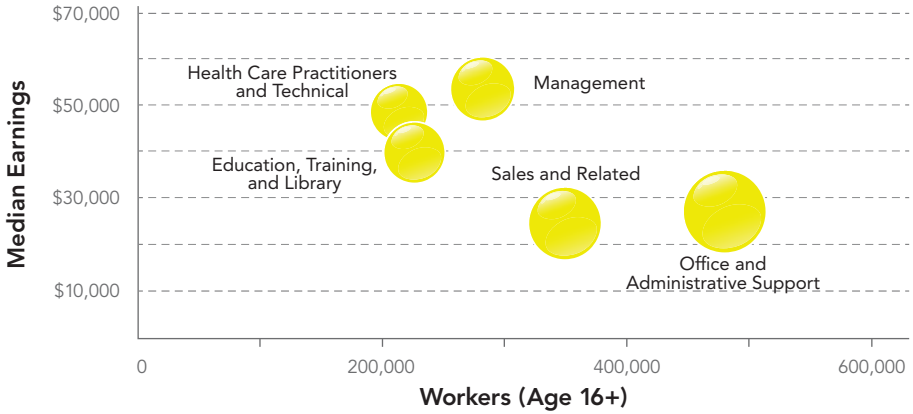
AVERAGE HOUSEHOLD BUDGET INDEX

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.



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.



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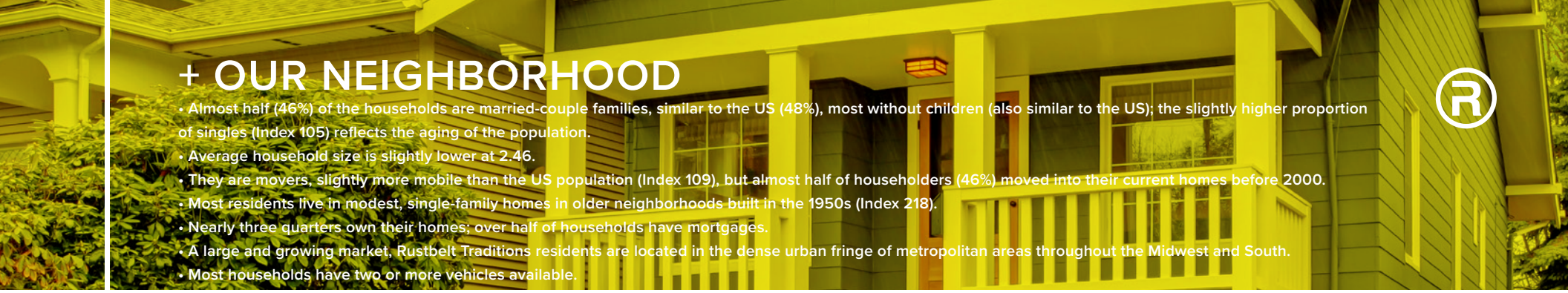
5D RUSTBELT TRADITIONS

The backbone of older industrial cities in states surrounding the Great Lakes, Rustbelt Traditions residents are a mix of married-couple families and singles living in older developments of single-family homes.

While varied, the work force is primarily white collar, with a higher concentration of skilled workers in manufacturing, retail trade, and health care. Rustbelt Traditions represents a large market of stable, hard-working consumers with modest incomes but above average net worth (Index 111). Family oriented, they value time spent at home. Most have lived, worked, and played in the same area for years.

US Household // 2,685,000
Average Household Size // 2.46
Median Age // 38.4
Median Household Income // $49,000



+ OUR NEIGHBORHOOD

- Almost half (46%) of the households are married-couple families, similar to the US (48%), most without children (also similar to the US); the slightly higher proportion of singles (Index 105) reflects the aging of the population.
- Average household size is slightly lower at 2.46.
- They are movers, slightly more mobile than the US population (Index 109), but almost half of householders (46%) moved into their current homes before 2000.
- Most residents live in modest, single-family homes in older neighborhoods built in the 1950s (Index 218).
- Nearly three quarters own their homes; over half of households have mortgages.
- A large and growing market, Rustbelt Traditions residents are located in the dense urban fringe of metropolitan areas throughout the Midwest and South.
- Most households have two or more vehicles available.

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents take advantage of convenience stores for fueling up and picking up incidentals.
- Watching television is a common pastime; many households have more than four TVs.
- Favorite programming ranges from ESPN, Animal Planet, and AMC to children's shows on Nickelodeon and Cartoon Network.
- Residents are connected; entertainment activities like online gaming dominate their Internet usage.
- Favorite family restaurants include Applebee's, Outback Steakhouse, and Texas Roadhouse.
- Radio dials are typically tuned to classic rock stations.

+ SOCIOECONOMIC TRAITS

- Most have graduated from high school or spent some time at a college or university.
- Unemployment below the US at 8%; labor force participation slightly higher than the US at 67%.
- While most income derived from wages and salaries, nearly 30% of households collecting Social Security and nearly 20% drawing income from retirement accounts.
- Family-oriented consumers who value time spent at home.
- Most lived, worked, and played in the same area for years.
- Budget aware shoppers that favor American-made products.
- Read newspapers, especially the Sunday editions.

+ 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.

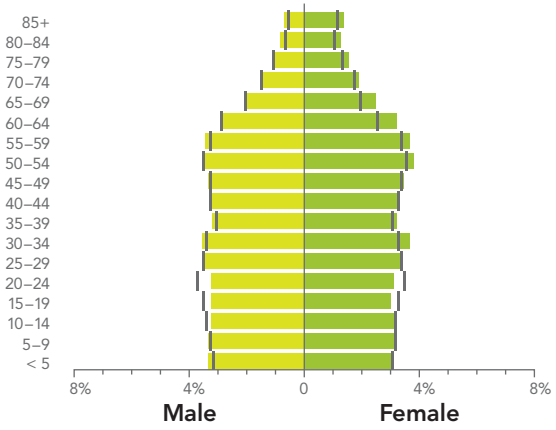
Typical Housing:
Single Family
Median Value:
$118,000
US Median $177,000

RUSTBELT TRADITIONS LifeMode Group • GenXurban

AGE BY SEX (Esri data)

Median Age: 38.4 US: 37.6

Indicates US



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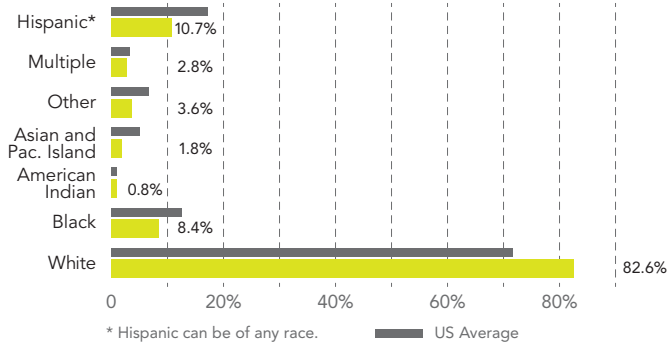

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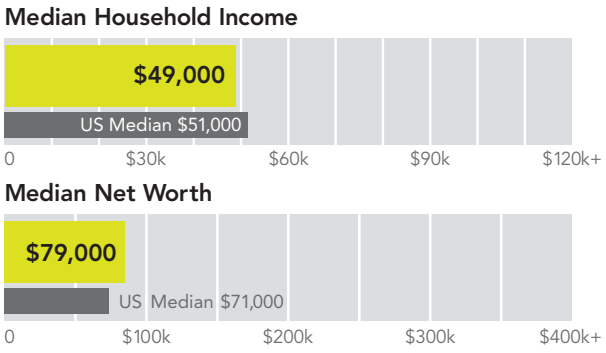

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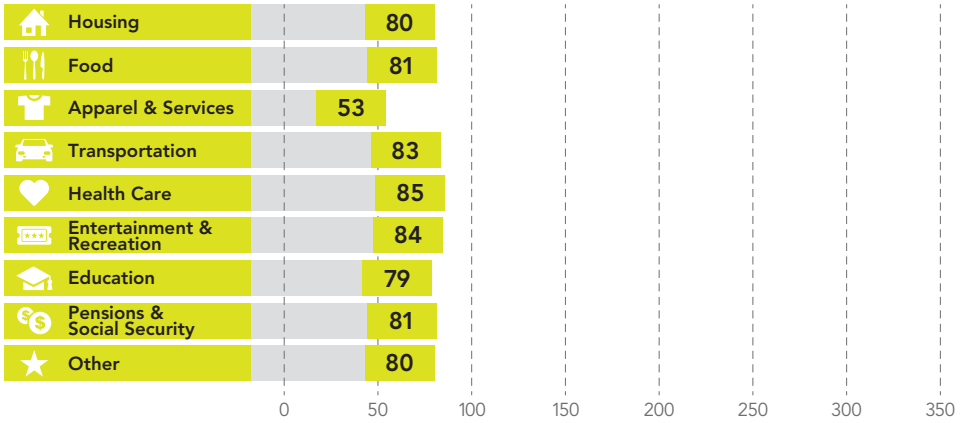

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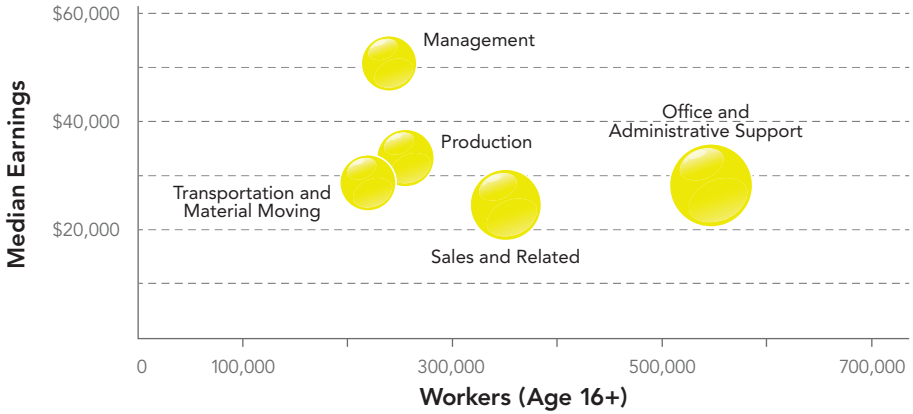

ABOUT THE RETAIL COACH

The Retail Coach, LLC, is a national retail analytics and locational intelligence firm that specializes in all aspects of retail market analyses and recruitment, from “macro to micro” trade area assessment to actively recruiting retailers on behalf of our clients.

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.

C. Kelly Cofer
President & CEO
The Retail Coach, LLC

Retail360®

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” data gathered through extensive visits within 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 helps assure our clients that they are receiving the latest and best information for their retail recruitment efforts—all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail360® 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 Retail Coach –
“It’s not about data. It’s about your success.”

ACKNOWLEDGEMENTS

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, 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 MapInfo, Nielsen, ESRI and/or Microsoft Corporation.

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