

BATTLE MOUNTAIN RETAIL SECTOR ANALYSIS



Battle Mountain Retail Sector Analysis

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TABLE OF CONTENTS

Section I, National, State and Lander County Retail Sector Trends	2
Section II, Needs and Perspectives of Battle Mountain Business Operators	13
Section III, Needs and Perspectives of Battle Mountain Consumers.....	45
Section IV, Market Segmentation for Downtown Battle Mountain.....	76
Section V, Analysis of Retail Sector Surpluses and Leakages.....	96
Section VI, Business Development Strategies to Capture Local Retail Sector Demands	105
Appendix A, Battle Mountain Business Owner Questionnaire	A-1
Appendix B, Battle Mountain Consumer Questionnaire	B-1
Appendix C, Demographic and Trade Area Information	C-1

LIST OF FIGURES

Figure 1, Battle Mountain Primary Area	78
Figure 2, Battle Mountain Secondary Area	78
Figure 3, Battle Mountain Tertiary Area	78
Figure 4, Battle Mountain Primary Trade Area Tapestry Segmentation	80
Figure 5, Battle Mountain Secondary Trade Area Tapestry Segmentation.....	81
Figure 6, Battle Mountain Tertiary Trade Area Tapestry Segmentation	82
Figure 7, Population Trends, 2000 and 2009	84
Figure 8, Primary Percentage Age Distribution, 2010	85
Figure 9, Primary Percentage Age Distribution, 2015	85
Figure 10, Secondary Percentage Age Distribution, 2010.....	86
Figure 11, Secondary Percentage Age Distribution, 2015.....	86
Figure 12, Tertiary Percentage Age Distribution, 2010	87
Figure 13, Tertiary Percentage Age Distribution, 2015	87
Figure 14, Household Income Distribution for Primary Trade Area, 2010	90
Figure 15, Household Income Distribution for Primary Trade Area, 2015	90
Figure 16, Household Income Distribution for Secondary Trade Area, 2010	91
Figure 17, Household Income Distribution for Secondary Trade Area, 2015	91
Figure 18, Household Income Distribution for Tertiary Trade Area, 2010	92
Figure 19, Household Income Distribution for Tertiary Trade Area, 2015	92
Figure 20, Leakage Surplus Factor by Industry Group	101

LIST OF TABLES

Table 1, Population Trends, 2000 and 2009	84
Table 2, Percent Age Distributions by Trade Area, 2010	88
Table 3, Percent Age Distributions by Trade Area, 2015	88
Table 4, Percent of Households by Income, 2010	89
Table 5, Percent of Households by Income, 2015	89
Table 6, Households Disposable Income, 2010	93
Table 7, Households Net Worth, 2010	94
Table 8, Spending Potential for Battle Mountain Study Area	98
Figure 9, Primary Percentage Age Distribution, 2015	85
Appendix Table 1, Battle Mountain Trade Area Demographics	C-2
Appendix Table 2, Profile of Households by Type of Neighborhood Battle Mountain Trade Areas	C-5

BATTLE MOUNTAIN RETAIL SECTOR ANALYSIS

“Where shopping flourishes, so do the communities that foster it. Where it fades, so do the economic prospects of the communities that lose it.”

-National Council for Economic Development

During 2010, the University Center for Economic Development conducted an analysis of the retail sector in Lander County and Battle Mountain. An analysis of current retail sector trends and potential retail sector opportunities was supported by the Lander County Economic Development Authority under the Future Industrial Needs Discovery (F.I.N.D.) Project.

This report is divided into six sections. The first section provides an overview of national, state and county trends in the retail sector. The second section analyzes the needs and perspectives of Battle Mountain business operators. The third section investigates the needs and perspectives of Battle Mountain consumers. The fourth section completes a trade area analysis of downtown Battle Mountain. Section five provides an analysis of retail sector surpluses and leakages in downtown Battle Mountain. The final section develops and suggests strategies for Battle Mountain to capture retail sector sales in Battle Mountain.

SECTION I

NATIONAL, STATE, AND LANDER COUNTY

RETAIL SECTOR TRENDS

SECTION I
NATIONAL, STATE AND LANDER COUNTY
RETAIL SECTOR TRENDS

Overview

The primary objective of Section I is to provide analysis of the changing national, state and county retail sectors. Also, the changing position of downtown retail will be discussed. By understanding these retail sector changes, Lander County decision-makers may be able to better target or position local retail sector development activities to take advantage of these national, state and county trends.

Section I is divided into seven sub-sections. The first sub-section discusses the different types of retail businesses that exist currently in the nation and their influence on contemporary and future retail sector trends. The second sub-section presents, in bullet form, trends in the national retail sector. The third sub-section presents, in bullet form, state of Nevada retail sector trends. The fourth sub-section presents, in bullet form, trends in Lander County's retail sector. The fifth sub-section discusses small town downtown market trends. The sixth sub-section of Section I presents, in bullet form, a summary of research findings pertaining to rural retail sector activity and opportunities. The final sub-section of Section I presents, in bullet form, a summary of impacts from large retail stores on rural commercial trade.

The Changing Structure of the Retail Sector

During the 1980s and 2000s, structure of the national retail sector changed more rapidly than during the period from the 1950s to 1970s. Shopping malls became powerful attractions and fundamentally changed shopping patterns. Retail sector consumers abandoned downtown shopping areas in large numbers and shopped in malls (usually in suburban areas) where the climate was controlled, there was plenty of free parking, there were gigantic anchor stores, lots of specialty stores, and convenient shopping hours all under one roof. In fact, shopping at large malls has become a tourism activity for many vacationers.

Most downtown areas did not respond in a competitive way to these suburban malls. Many downtown areas left parking meters in place, continued to close at 5:00 or 5:30 p.m., continued to allow store workers to park in front of the store, and in general, had very little coordination or cooperation in establishing policies or --a central community shopping area and meeting place, and are evolving into a blend of

service type businesses such as real estate offices, lawyers, accountants, insurance agents, and a small mix of retailers.

During the late 1980s and 2000s, the national retail sector has realized rapid growth in several segments. These segments are discount general merchandisers, membership warehouse clubs, "category killer" stores, factory outlet malls, specialty mail order, and Internet stores.

Discount General Merchandise Stores

Discount general merchandisers encompass such national chains as Walmart, K-Mart, and Target, as well as several regional chains such as Shopko. These stores range in size from 30,000 to 140,000 square feet, depending on the age of the store and market area served. These stores typically have 30 or more departments and relatively low prices due to a lower level of service than traditional department stores, and they continued to improve their operating efficiency. Discount general merchandisers usually carry 40,000 to 80,000 "stock keeping units," that is, separate items of merchandise.

Membership Warehouse Clubs

Early warehouse clubs primarily targeted small retailers but as time went on, increasing numbers of consumers started shopping in these warehouse clubs as shoppers became aware of the cost savings due to their low overhead.

Membership warehouse clubs are usually large stores, ranging from 80,000 to 140,000 square feet. Warehouse clubs are typically austere with bare concrete floors, unfinished ceilings, and warehouse shelving. Much of the merchandise is placed on shelves in pallets by forklifts. Most of these stores have evolved to where half of their sales are groceries. Substantial merchandise is sold in large packs, such as 24-roll packages of toilet tissue or 12-roll packages of paper towels.

Warehouse clubs operate on a very thin gross profit margin, ranging between eight to 12 percent of sales. Therefore operating costs are kept low by austere facilities and by shipping merchandise directly from the manufacturer to the store. Because of limited selection of goods at these membership warehouse clubs, their impact on other commercial sector merchants is less when compared to discount general merchandise stores.

“Category Killer” Stores

Large retail stores that specialize in a fairly narrow line of merchandise are called “category killer” stores. These stores have a large selection within a narrow category of merchandise and often smaller stores cannot compete in categories where they have a limited selection. In most cases, store personnel are very knowledgeable about the merchandise. These stores typically require a high traffic count. This means stores such as Home Depot, Circuit City, The Good Guys, Office Depot, Staples, Oshman’s Sporting Goods, Sportsmart, etc. normally locate in mid- to large-sized cities. However, these chains are now experimenting with smaller format stores in smaller communities.

Factory Outlet Malls

Factory outlet malls originated on the East Coast but have now migrated across the nation. The first factory outlet malls were located downtown in vacant factories and warehouses. Now most of the malls are located along interstate highways and within the commuting distance of population centers.

Factory outlet malls vary in size from eight to 10 stores up to 75 to 100 stores. Most stores in factory outlet malls are apparel stores but more specialty stores, such as bookstores or house ware stores, are appearing in these malls.

A good study showing the sales of factory outlet malls could not be found. However where shopping malls have located in states with good sales tax data such as Iowa, shopping malls generate \$20 to \$60 million per year in retail sales (Stone, 1995).

Mail Order Houses and Internet Shopping

Mail order houses have evolved from general catalog sales merchants like Sears, Montgomery Ward, and J.C. Penney to specialty sales. Currently, there are thousands of specialty mail order houses that sell computers and supplies, office supplies, apparel for the whole family, and sporting goods, just to mention a few.

As of 2008, 85 percent (875 million) of the world’s online population has used the Internet to make purchases. Books are the top item purchased online while clothing/ accessories/shoes follow. Consumers tend to stick with what they know and buy from a site that they have previously used. Online search engines also play a big role in where consumers make their purchases.

Word-of-Mouth (WOM) or Social Networking Marketing

Word-of-mouth (WOM) marketing uses social networking technology as means of marketing. People are currently able to advertise a business, send out promotions, and attract new customers using networking programs such as Facebook, Twitter, phone applications, and more. These programs are designed to meet the marketing needs of a business and give people an online community of friends that allow them to share their background, current activities and photos. Word-of-mouth communication strategies are appealing because they combine overcoming consumer resistance with lower costs and fast delivery. With new networking technology, restaurants can advertise at home or inform customer of their daily specials and location.

National Retail Trends

From the U.S. Bureau of Labor Quarterly Census of Employment and Wages (2010), the U.S. Census of Retail (2007), and the Consumer Science and Retailing Department at Purdue University (1998), the following is a list of national retailing trends.

- The national retail sector consisted of approximately 11.3 percent of total national employment in 2009.
- In 2009, the national retail sector employed more people than the national manufacturing sector.
- Nationally, the retail sector in 2007 had sales of \$3.9 trillion and employed 15.5 million people in 1.1 million establishments.
- The national retail sector in 2007 generated sales of \$3,502,286 per establishment, generated sales of \$251,880 per employee, with average compensation of \$23,000 per employee.
- Nationally, 15 percent of all retail stores generated less than \$250,000 in sales in 2007.
- Nationally, 45 percent of total retail stores generated sales of less than \$1,000,000 in 2007.
- Over 58 percent of total retail gross leasable space is located in shopping centers including shopping malls.
- Retail employment is expected to grow by 4.3 percent between 2008 and 2018, representing 654 thousand new jobs.
- In the 1960s, the U.S. had 4 square feet of retail space per capita.
- In 2007, the U.S. had 20.9 square feet of retail space per capita.

State of Nevada Retail Trends

From the U.S. Bureau of Labor Quarterly Census of Employment and Wages (2010) and U.S. Census of Retail Trade (2007), the following trends in state of Nevada retail trade are enumerated.

- The retail trade sector consisted of approximately 11.3 percent of total Nevada employment in 2008.
- Retail trends in the state of Nevada accounted for \$37.4 billion in sales and employed 139,829 people in 8,492 establishments in 2007.
- Retail trade in the state of Nevada generated \$4,408,146 in sales per establishment, generated sales of \$267,712 per employee, and paid an average wage of \$26,400 per employee in 2007.

Lander County Retail Trends

From the U.S. Bureau of Labor Quarterly Census of Employment and Wages (2010) and U.S. Census of Retail Trade (2007), the following trends in Lander County, Nevada retail trade are enumerated.

- The retail trade sector employed 8.3 percent of total Lander County employees in 2009.
- Retail trade in Lander County accounted for \$54.9 million in sales and employed 237 people in 22 establishments in 2007.
- Retail trade in Lander County generated sales of \$2,499,136 per establishment, generated sales of \$231,987 per employee, and paid an average wage of \$16,755 per employee in 2007.

Small Town Downtown Market Trends

Small city downtowns throughout the country are being rediscovered as historic, authentic and sustainable mixed-use centers that offer places for shopping, employment, housing, dining, culture, and worship. Unlike shopping centers that primarily serve national retail tenants, downtowns enjoy diversification of use. Downtown environments are growing in popularity among many segments, young and old, who seek an urban (even in rural areas), amenity-rich experience. Downtowns are also gaining interest as a place for sustainable development, offering a central place in the community with opportunities for reusing and improving existing structures. Finally, downtowns have become the location of choice for many entrepreneurs and creative people. The downtown environment offers social and

business interaction, diversity, and amenities appealing to people with various talents.

Economic development planning for any commercial district requires relevant market information to guide business retention, expansion, recruitment, marketing, and other efforts. This information is the focus of a "market analysis". Given the dynamic downtown environment, the traditional retail-driven analytical models no longer apply to downtown districts. Even more sophisticated demand/supply techniques used by national retailers are not applicable. Instead, downtown development professionals must analyze a complex market with a variety of building uses, independent ownership of building and businesses, distinct consumer segments, and intense competition from surrounding commercial centers.

For downtown retail development, four trends were enumerated in a referenced study by Stumpf (2010). These four trends are converging to impact the national, regional, and local retail sector. These four trends are demographic trends, urban growth and sustainability, retail consolidation, and Internet sales.

Demographic Trends

Every generation has a unique expenditure pattern. Consumers start out as children spending very little and increase purchases as their income grows. Then around retirement age, consumers begin to spend less. The Baby Boom, the largest generation, is now beginning to retire. Generation X is much smaller and Generation Y is just beginning to spend. To further complicate the picture, these younger generations have much different interests and desires than the Boomers. This is equally true in work, housing, and shopping.

Growing ethnic populations are a second demographic trend shaping future retailing. It has been said that it won't be long before minorities become the majority. They are already a major force in retailing. Efforts among chain retailers to reach out to these diverse populations, as well as the arrival of new or foreign chains to accompany the independent merchants serving these markets, have begun.

Urban Growth and Sustainability

Smart Growth has always been embraced by advocates of downtowns, as many see its principles as benefitting urban centers and redirecting development inward. The real test is whether the general public embraces it, and evidence is

starting to accumulate to say that it has. A growing segment of the population, from retiring empty-nesters to young singles, is showing a preference for urban living. The population has stabilized, and in many communities, the urban core is growing. Walkable downtowns and neighborhood shopping districts have been reinvigorated by this trend, which most analysts believe will continue to grow once the housing market sorts itself out and begins to grow again.

Retail Consolidation

There are fewer retailers around now. Decades of consolidation have left the U.S. with a handful of department stores, three major office supply chains, three major hardware dealers, two and one-half discount store chains, one electronics giant, and one bed and bath outlet. Consumers are bored. Boredom demands a counter-trend. It can happen downtown.

Internet Sales

Lastly, there is the Internet. A growing proportion of sales are occurring online. Certainly online sales will continue to grow, but what may be the long-term prognosis for retail in general, and downtown in particular? Will online sales lead to a scaling back of the major chains and expanded reach for smaller retailers? The Internet could be an opportunity for downtown businesses to supplement their sales and compete effectively against larger local competitors. Also, the use of mobile phone apps and coupons may provide a new avenue for rural retailers to capture local customers. The jury is still out on this one with the end results yet to come.

Synopsis of Research Concerning Factors Influencing Rural Retail Sector Trade Activity

Below is a list of short synopses of research findings concerning factors influencing rural retail sector trade activity. The objective is to provide concise findings of academic and professional articles that may provide assistance to Lander County decision-makers in formulating strategies and targets for local commercial sector development activities.

- Stone (1988) found that if a shopping mall is present in a county, total retail sales for that county increased by \$75 per additional square foot of retail space. However, when a shopping mall is located outside the county and is within 25 miles of the county seat, total county retail sales decreased by \$4.86 for each additional square foot of mall space. When a mall is located outside the county and within 26 to 50 miles of the county

seat, county retail sales realized a loss of \$0.61 for each additional square foot of mall space.

- Yanagida et al. (1991) developed an analytical framework for explaining pull factors across counties in the state of Nebraska. They found that lower retail sales leakages may be attributed to counties that are situated farther from trade centers, have large federally adjusted gross incomes, and experience lower county population decreases than average rural Nebraska. Specifically for Nebraska counties, the smaller the population of the largest town, the more significant the sales leakage.
- Ayers et al. (1992) completed a study of rural retail businesses in 37 communities in the three states of Indiana, Iowa, and North Dakota. Their analysis identified both supply and demand factors in capturing local demands. Factors capturing additional local demands were (1) a more diverse local economy, (2) providing business management training and technical assistance, (3) establishing a mechanism to increase transfer of business operations to new owners, (4) developing financial assistance programs for new and aspiring businesses, and (5) developing extension and outreach programs that assisted communities to understand and cope with a changing economy.
- Gruidl and Andrianacos (1994) found that demand factors played a central role in rural retail sector capture. County population and income levels were found to have significant impacts on rural retail sector expansion. However, elements underlying the supply side of the rural retail market such as access and adoption of new retail sector technologies were important components to rural retail sector trade. Gruidl and Andrianacos (1994) concluded their paper by calling for better understanding of the forces influencing rural retail sector markets. If demand is found to be a major factor underlying rural retail sector markets, then public policy efforts should focus on expanding basic or export sector employment and income. However, if declines result from supply side factors, such as efficiency of local retail trade sector, customer relations, etc., then efforts to improve competitiveness of rural retail sector owners must be a primary objective.
- Darling and Tubene (1996) investigated retail sector activity for 87 rural Kansas cities. Their results showed that city population alone explained significant variation in taxable retail sector sales. Kansas cities with population over 5,000 consistently showed an inflow of retail sector trade.
- Gale (1996) used time series data to investigate trends in rural retail sector activity. Gale found that from 1982 to 1992, rural counties were losing their capture of local retail sector trade. Factors influencing retention of retail sector trade capture were high population density, lower farm reliance, larger county size, and access to interstate highways.
- Bhuyan (1997) found through disaggregated analysis of retail sector trade in North Dakota that niche markets for specific goods and services exist within rural counties where the firms may effectively compete.
- Harris and Shonkwiler (1997), Shonkwiler and Harris (1996), and Ebai and Harris (1997) found that retail sector firms are interrelated and that number and type of retail sector firms greatly impact the probability of existence of other types of retail sector activities.

- Brooks and Whitacre (2011) found that the existence of a Critical Access Hospital in a rural area positively impacted local retail activity. The retail activity from a critical access hospital in a rural community is similar to an existence of a Walmart.

Synopsis of Impacts of Large Retail Stores on Rural Retail Trade

This is a list of short synopses of research findings concerning factors influencing rural sector activity by large big-box retail firms. The objective of this sub-section is to provide concise findings of academic and professional articles for Lander County decision-makers pertaining to "big-box" retail firms and their potential impacts to the Lander County retail sector.

- Keon, Robb, and Franz (1989) compared economic conditions in fourteen (14) Missouri counties with and without Walmart stores. They found no evidence of net negative impact of Walmart location, instead finding increases in broad measures of income, retail employment and income, and sales tax revenues. At the retail level, they found that overall number of retail stores declined, but there was more employment and slightly higher payrolls.
- Ozment and Martin (1990) investigated what happened if Walmart entered communities that had positive growth rates. After incorporating the effects of overall county or community growth rates, they found that Walmart had few significant positive effects on the sample rural counties. The authors conclude that Walmart may have selected faster-growing counties for store locations, and that the growth in the economy was not likely associated with Walmart entrance.
- Stone (1997) examined four Iowa communities of 5,000 to 40,000 in population to find the impact of Walmart on local retail sales capture. Stone found in the short-run, Walmart induced increases in several retail sectors. Stone suggested that in the long-run, retail sales capture between counties with Walmart versus those without will continue to modestly diverge. In the short-run, the divergence is more pronounced. The reason for this divergence is that consumers will travel to counties with a Walmart and do substantial retail sector purchasing in the county with a Walmart.
- Barnes and Connell (1996) found for northeastern counties in the U.S. that the location of Walmart had impacts on patterns of retail sector establishment numbers and sales. They found that the location of a Walmart increased general merchandising sector sales, but not establishment numbers, had little or no change on sales or establishment number for the grocery store sector, but decreased sales in the automobile sector and furniture sector while increasing sales in the eating and drinking sector, the apparel sector, and the drug store sector.
- Hicks and Wilburn (2001) investigated the impacts of the entrance of a Walmart store in the host county and adjacent counties in West Virginia. They found the impact of a Walmart store was much more pronounced than the overall county growth rate. Their results indicated a net benefit

to employment and wages of having a Walmart locate in a county. Interestingly, the increased new employment from the location of the Walmart occurred mostly in the first year, which tended to be permanent for at least three years. For adjacent counties, employment decreased.

- Franklin (2001) found that the decision of Walmart to enter West Virginia markets was based on population size, not population growth or per capita income.
- Stone and Artz (2001) found that for Midwestern counties, retail capture in the host counties of big-box building materials stores (Home Depot, Lowes, Menards, etc.) gained significantly after a big-box store located in a county. Before the big-box store, the average host county had building materials sales leakages; however, after six years of the big-box store being located in a county, the average host county had building materials sales surplus of \$20 million. Non-host counties had building materials sales leakage that worsened over time. Economists would call this a zero-sum result. Some counties capture sales while others lose.
- Artz and Stone (2006) showed that Walmart super stores had a negative effect on rural grocery store sales during the first two years in Mississippi. After two years, the Walmart effect dissipates. Walmart super stores also impacted the prices of local competing retail businesses.
- Goetz and Rupasingha (2006) found that Walmart's presence depressed social capital in a community. That is, where Walmart is located, the number of churches, political organizations, and business groups are lower per capita.

SECTION II

**NEEDS AND PERSPECTIVES OF
BATTLE MOUNTAIN BUSINESS OPERATORS**

SECTION II

NEEDS AND PERSPECTIVES OF BATTLE MOUNTAIN BUSINESS OPERATORS

Battle Mountain, an unincorporated municipality, is the county seat and largest metro area in Lander County, NV. Historically, the Battle Mountain economy has been prone to “boom and bust” cycles influenced largely by regional mining activity. The Battle Mountain Business Operator survey sought to understand business owners’ perspective about the current business and entrepreneurial climate in Battle Mountain and how that climate could be improved for existing and new business owners.

Survey Overview

The survey was designed in part using previous business owner surveys generated by a variety of other university Cooperative Extension programs. The questionnaire was reviewed and modified to best address entrepreneurial concerns specific to the Battle Mountain community. While few questions overlap, the business owner survey is intended to be analyzed in conjunction with a separate survey covering opinions of Battle Mountain consumers.

Types of Questions

- Business Demographics: Operations, Location, and Marketing.
- Other Businesses: Competition and Complements.
- Community Perspectives.
- Business Challenges and Desired Assistance.

Survey Distribution and Response

Because the population of Battle Mountain is relatively small (2,871 as of the 2000 census), all Battle Mountain businesses were targeted for this survey. The Dillman Method (Dillman et al., 2009) was employed across all steps of survey design and implementation. An announcement was posted in the *Battle Mountain Bugle* for each round of business owner survey implementation in lieu of individual pre-announcement letters.

One hundred and seventy-two businesses were surveyed. The addresses were obtained from the Lander County Office of Community Development and

represent all existing businesses within Battle Mountain. One hundred and twenty of the 172 businesses were randomly selected for the initial survey implementation. The randomly selected 120 surveys were delivered in person by the Battle Mountain High School Leadership Class (BMHSLC) on April 19, 2010 and April 28, 2010. Surveys were then sent by mail on May 25, 2010 to the remaining 52 businesses not surveyed by BMHSLC as well as to the 67 non-responding businesses surveyed by BMHSLC.

Fifty-two of the 120 surveys implemented by BMHSLC were returned reflecting a 43.3 percent response rate. Nine of the 119 mailed surveys were returned – a 7.6 percent response rate. With 63 total respondents of the 172 surveyed, the overall response rate was 36.6 percent.

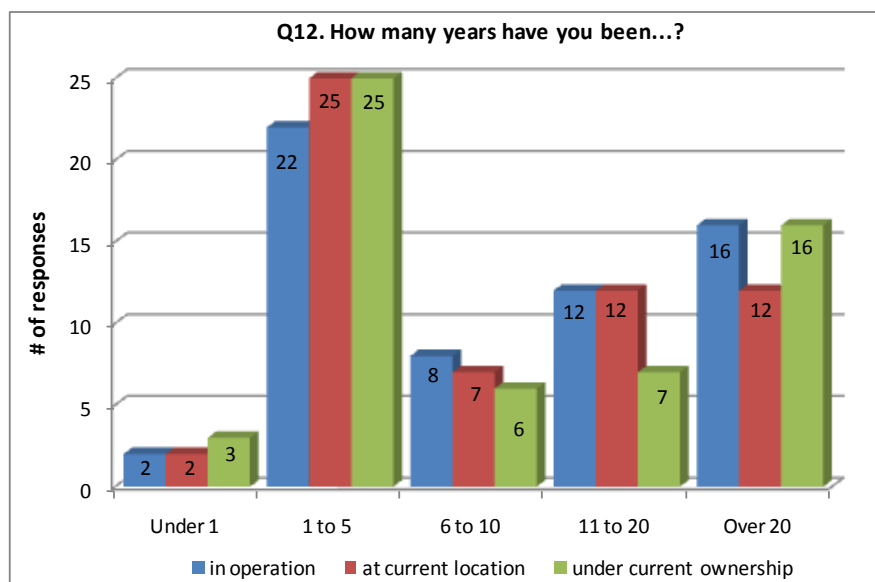
Survey Response

Business Demographics: Operations, Location, and Marketing

▪ *Operations*

How many years has your business... (Q12)

Participants were asked to choose a single time length (in years) for each of three business descriptors: operations, location, and ownership. For each of these business descriptors, the largest number of businesses had been in business from one to five years and over 20 years. Not many businesses in Battle Mountain reported being in business for six to 20 years either operating at their current location or under their current ownership.

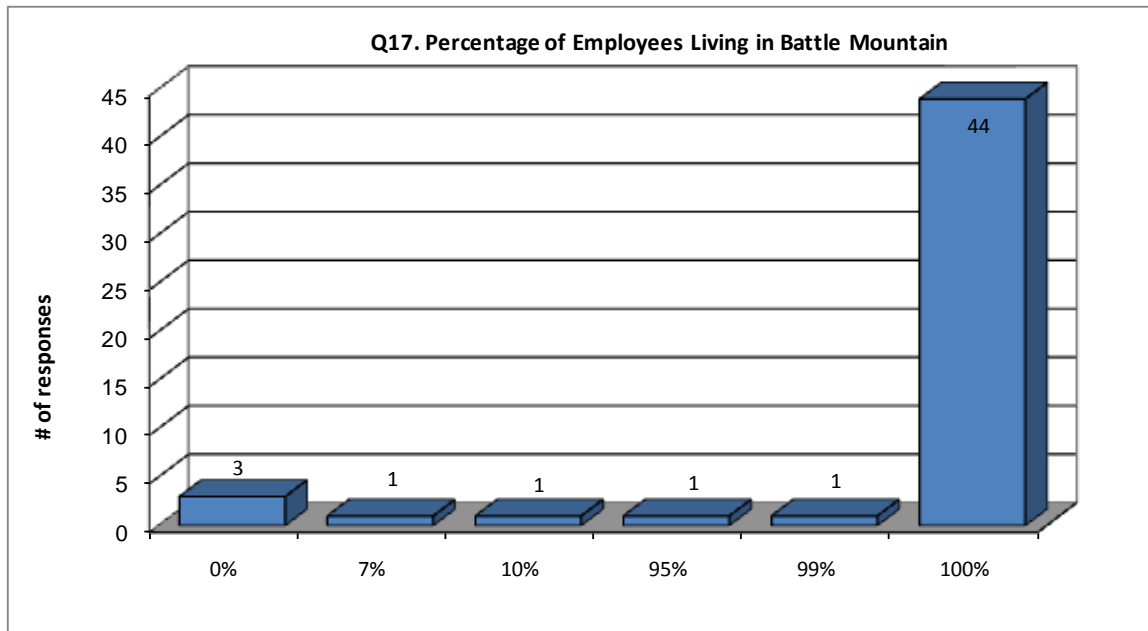


Staff and ownership hours and residence. (Q17)

This was an open-ended question with four distinct sections. Participants were asked to write in percentage of employees living in Battle Mountain, then to provide the number of fulltime, part-time, and seasonal employees and owners. Fulltime was defined as 32 or more hours per week.

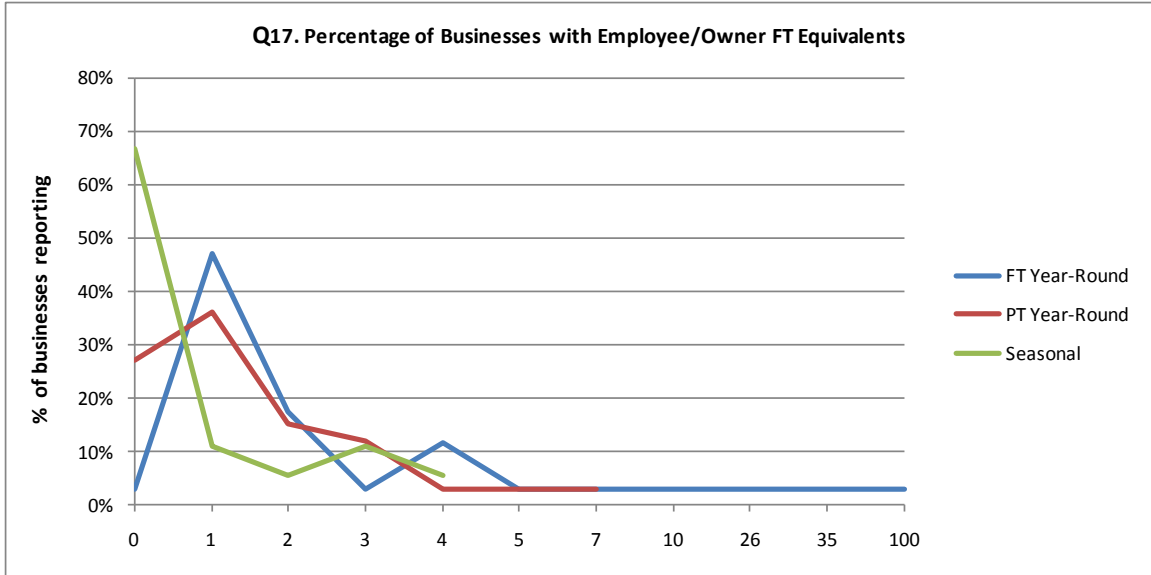
What percentage of your employees live in Battle Mountain?

Of the 51 businesses that responded, an overwhelming number of businesses (90.3 percent) reported that 95 percent or more of their employees lived in Battle Mountain.



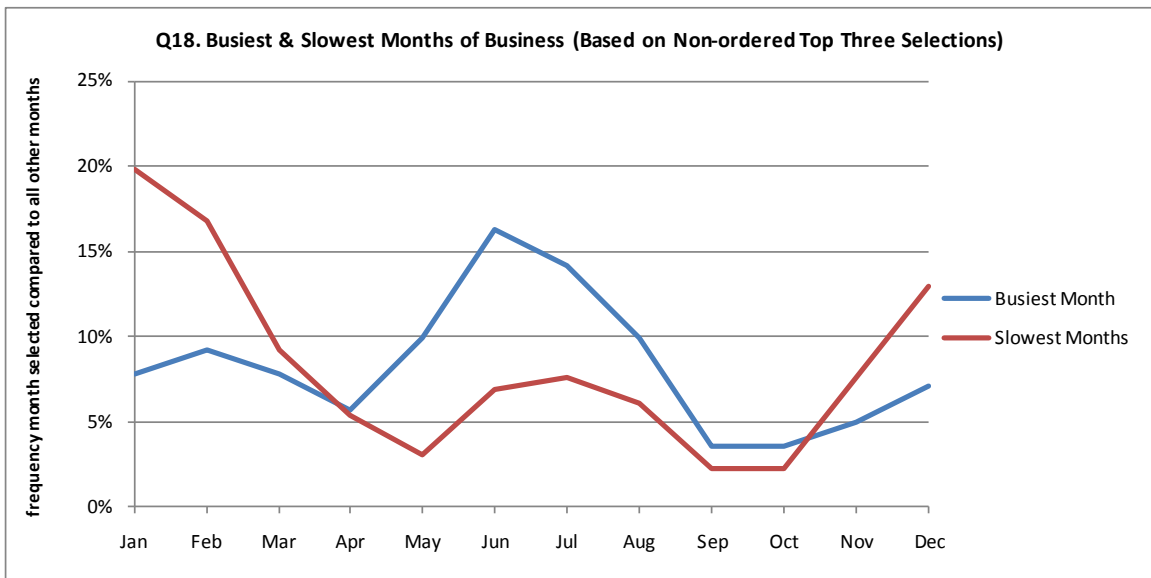
How many people including owners are full-time workers?

The majority of businesses that responded reported that they had three employees, with most being seasonal employees.



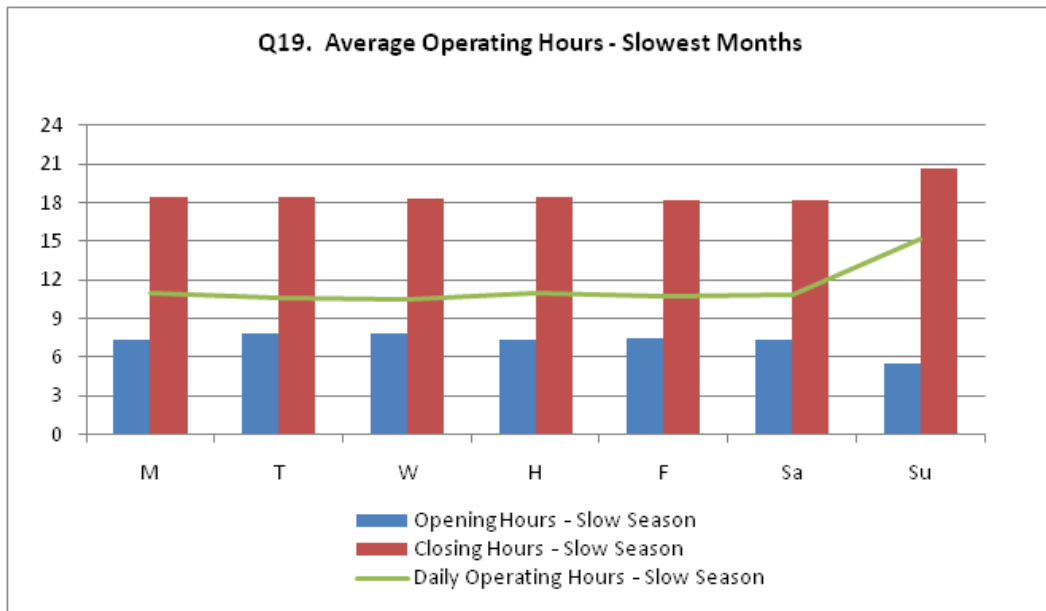
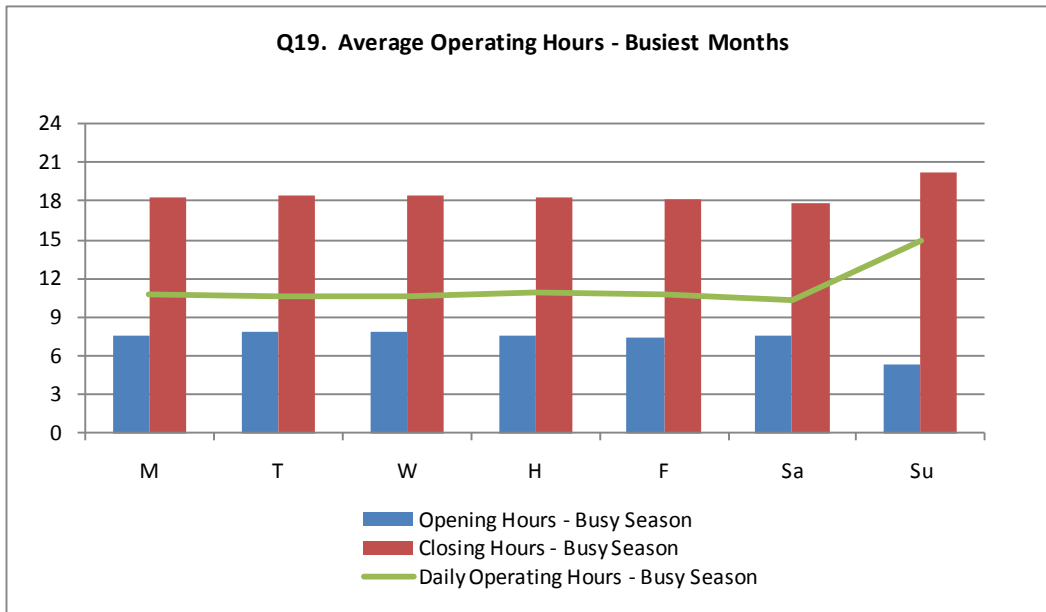
What are the THREE busiest and THREE slowest months of the year for this business? (Q18)

Participants were asked to choose three of the 12 months that are the busiest and three of the 12 months that are the slowest for their business. The busiest months were reported to be June, July, and August; while the slowest months were reported to be January, February, and December.



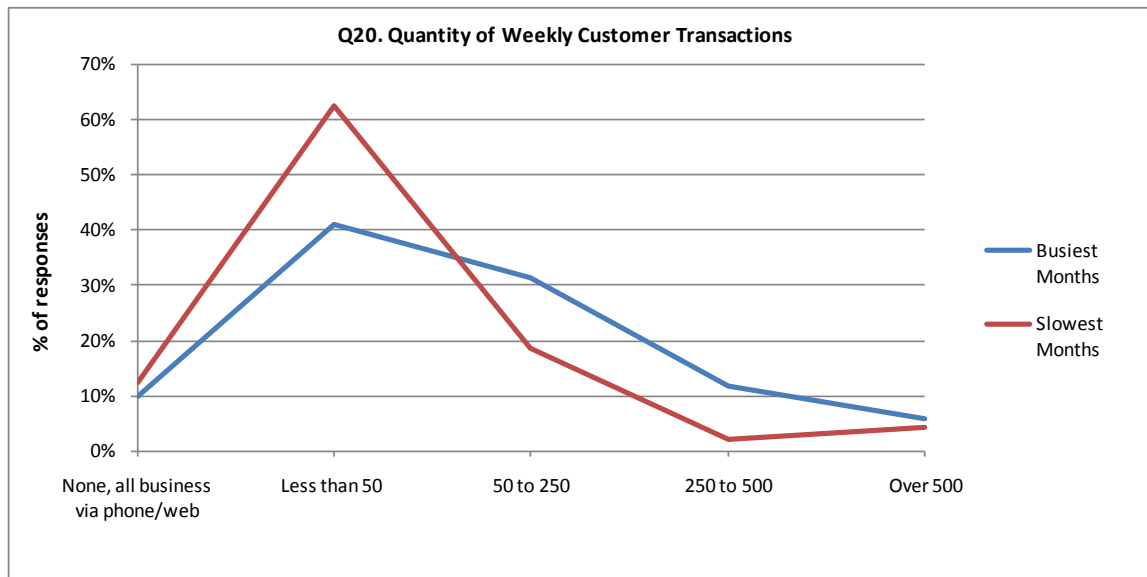
What are the hours of operation of your business? (Q19)

This was an open-ended question. Participants were asked to write in opening and closing times by day of the week for both their busiest months and slowest months of the year. The charts below reflect the average times provided for each particular month, weekday, and open/close. Times are presented in military time. There were only very slight differences reported in operation times for the busiest and slowest months. The green line, representing the "Daily Operating Hours", reflects the average number of total hours a business is open for operation.



How many customer transactions do you do per week during the busiest months and the slowest month? (Q20)

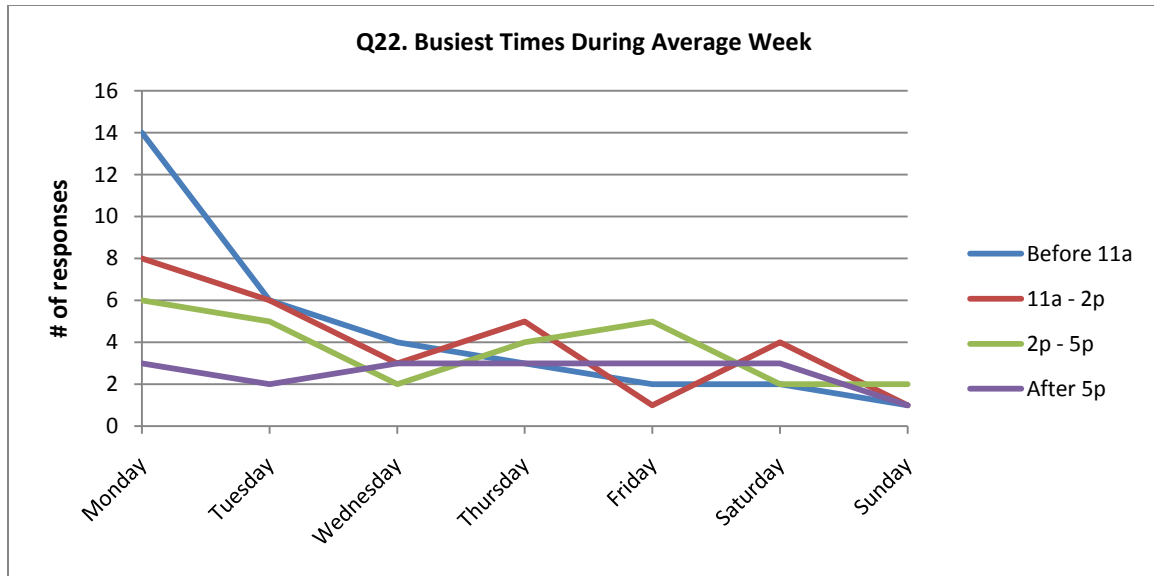
Participants were asked to choose one of five monthly transaction ranges for both the busiest and again for the slowest months. Transaction ranges spanned from “None, all business via phone or web” to “Over 500”. During the “Slowest Months” a majority (62.5 percent) of respondents reported a lower number of transactions (“Less than 50”), while the “Busiest Months” reflected transactions that were more evenly distributed across the ranges.



During an average week of the year, what are the busiest times for your business? (Q22)

Participants were asked to choose four out of 28 time blocks that were the busiest for their business. Time blocks were defined by day of the week then further by four distinct blocks of hours (e.g. “11:00 am – 2:00 pm”). Responses were excluded for respondents selecting more than four time blocks. One hundred and four time blocks were recorded.

Monday was reported as the busiest time for all time blocks with “Before 11:00 am” being the most busy of any of the other 28 time blocks.



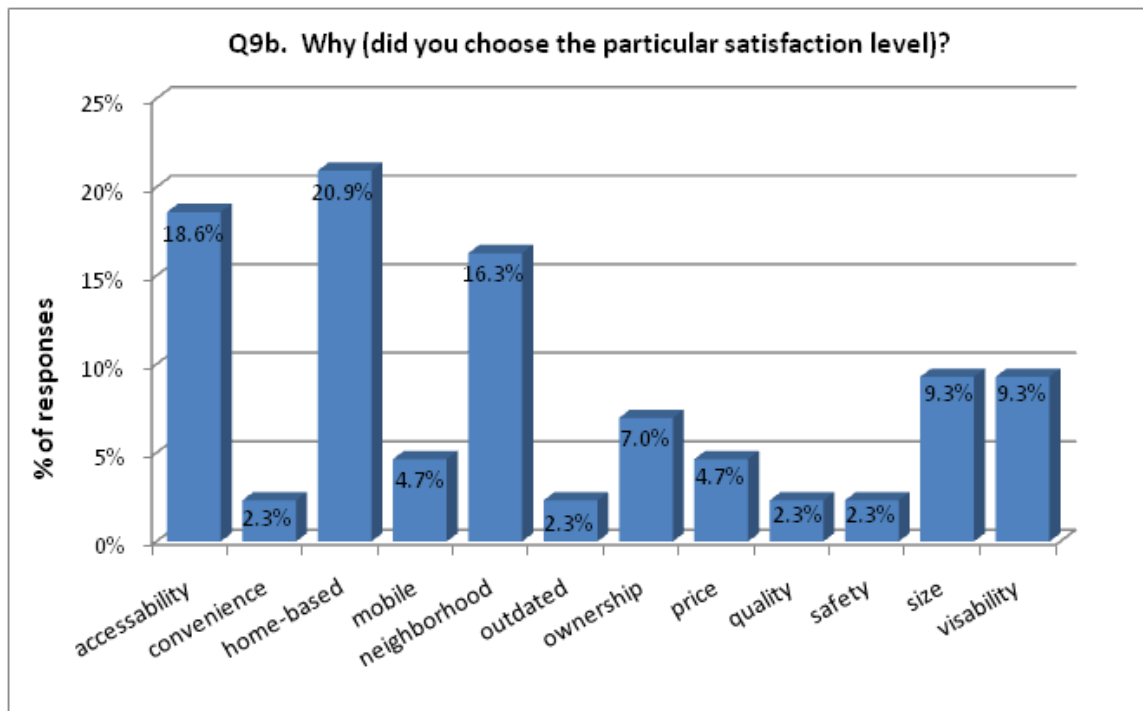
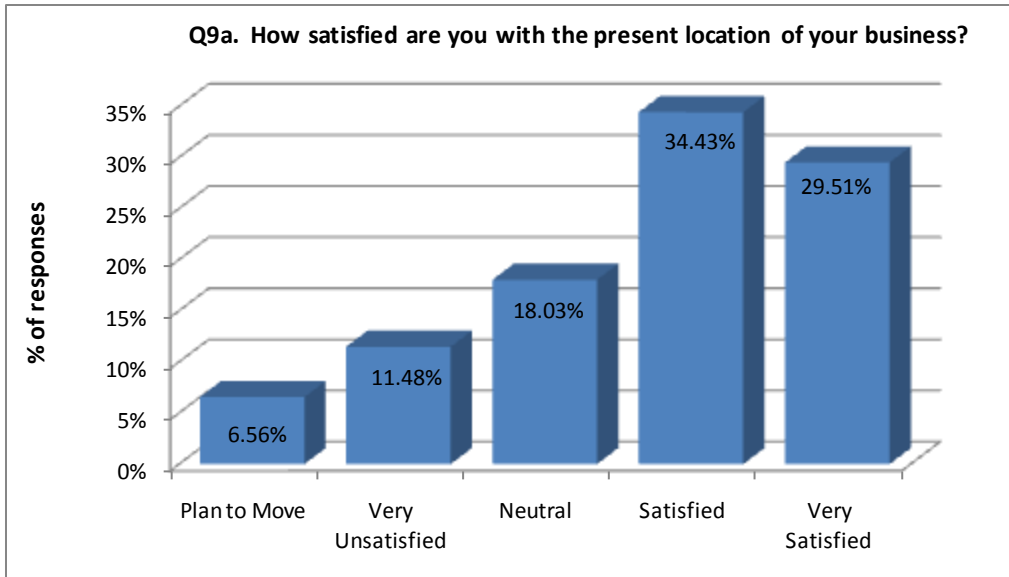
▪ *Location*

How satisfied are you with the present location of your business? (Q9)

This was a two-part question. Participants were first asked to choose one phrase (e.g. "Satisfied", "Plan to Move") describing their satisfaction level with their present business location. Next they were asked "Why?" and provided several blank lines to provide an open-ended response.

In order to report the findings simplistically, responses were categorized into seven categories such as convenience, price, etc. These descriptors are intended to capture the nature of each statement. An individual statement may have been categorized in more than one category. For example, a statement such as "Lots of space, hard to find." would have been classified in both "size" and "visibility".

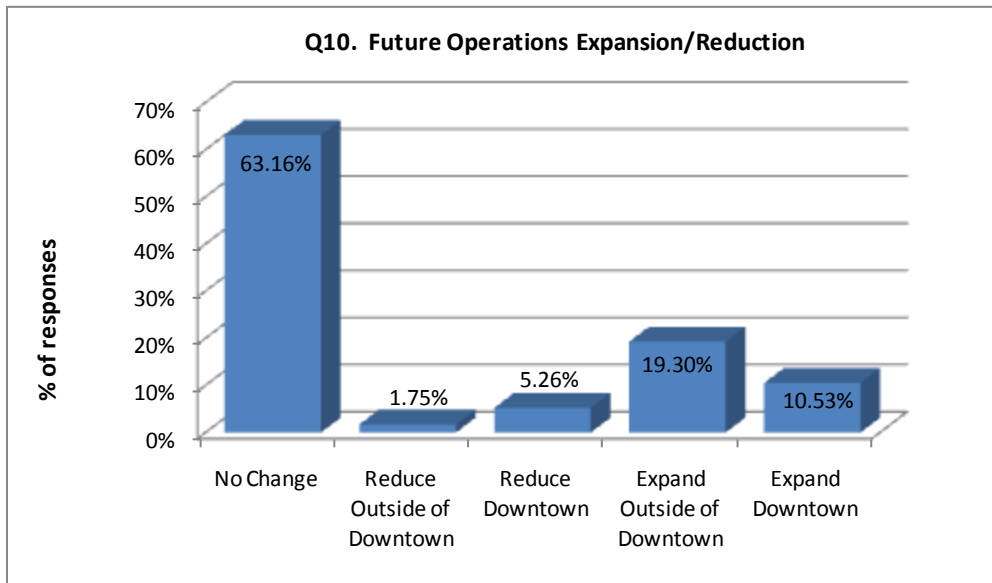
Approximately 64 percent (63.94 percent) of the respondents stated that they were "Satisfied" or "Very Satisfied" about their current location. No one responded that they were "Unsatisfied" with their location. Of all respondents, regardless of positive or negative satisfaction, 72.09 percent provided location related explanations for their response.



Do you have plans to expand or reduce operations of your business in the next year? (Q10)

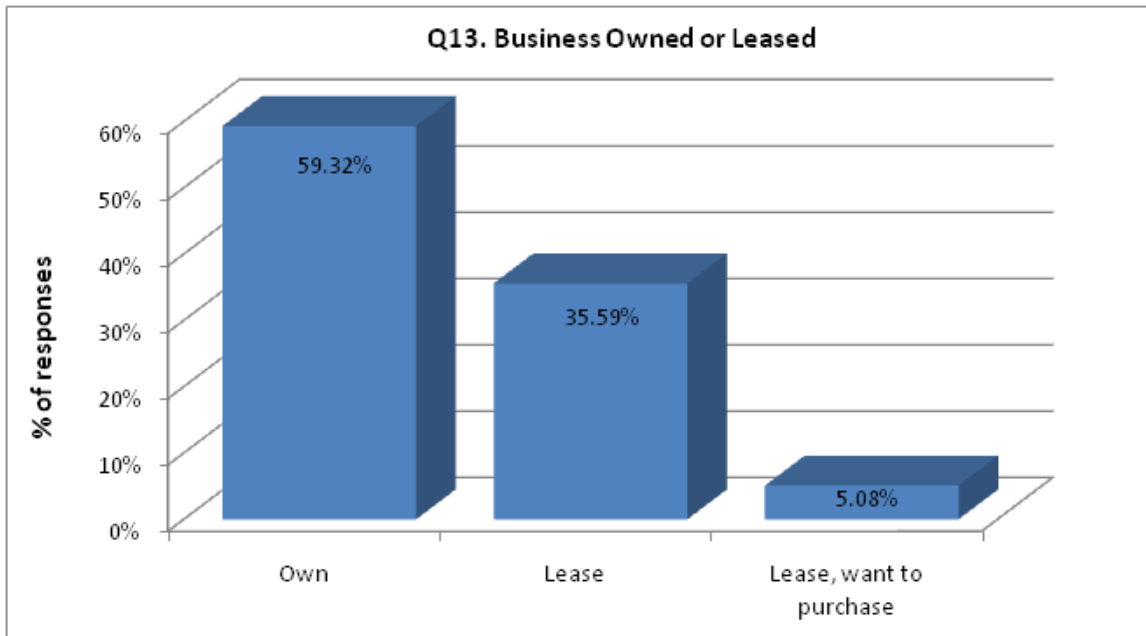
Participants were asked to choose a single response to this question. Participants were asked about their plans for their operation's expansion or reduction. The majority of responses (63.16 percent) indicated no planned changes.

Of those that did plan to change, the majority (19.3 percent) planned to expand outside of the downtown area.



Does your business own or lease the space in which it is located? (Q13)

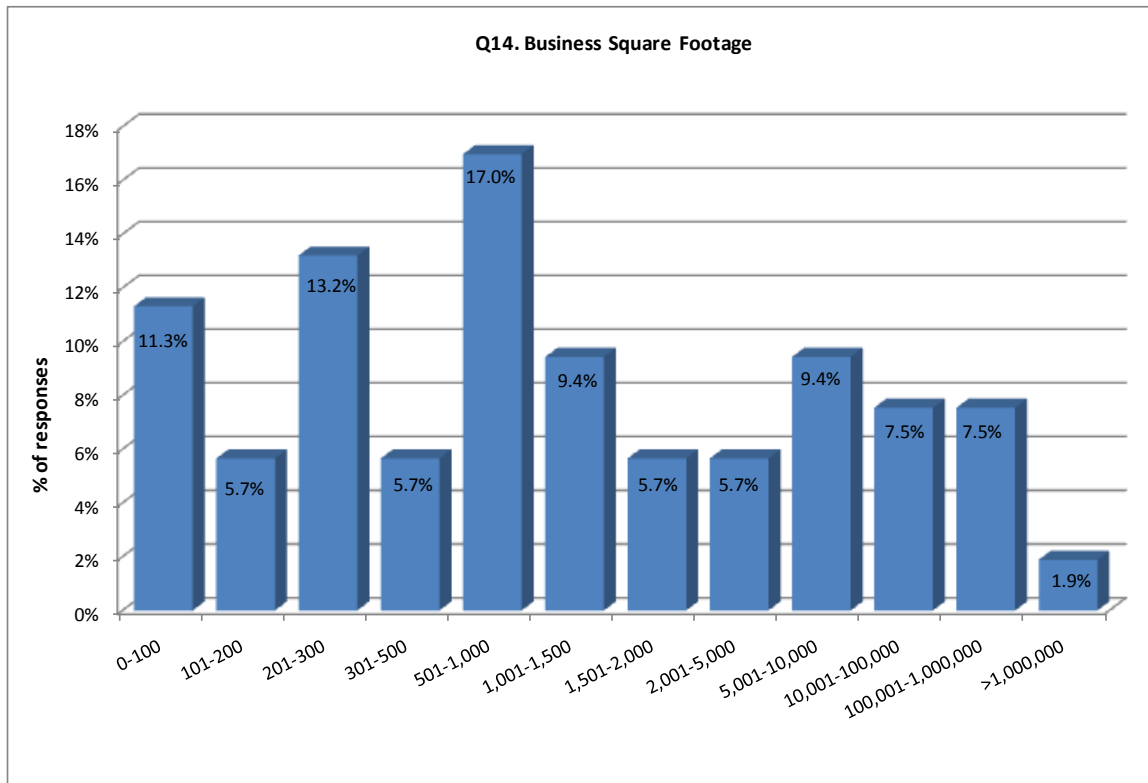
Participants were asked to choose a single description of ownership status – “Own”, “Lease”, “Lease, want to purchase”. The majority (59.32 percent) of business locations were reported as being owned by the operators.



How many square feet are devoted to your business? (Q14)

This was an open-ended question. Participants were asked to write in the square footage for their entire area of operations. Excluding the six largest square footage reports, the average square footage was 3,788 square feet. Outliers on the high end were likely to be mines or ranches. Outliers on the low end were likely to be mobile service providers.

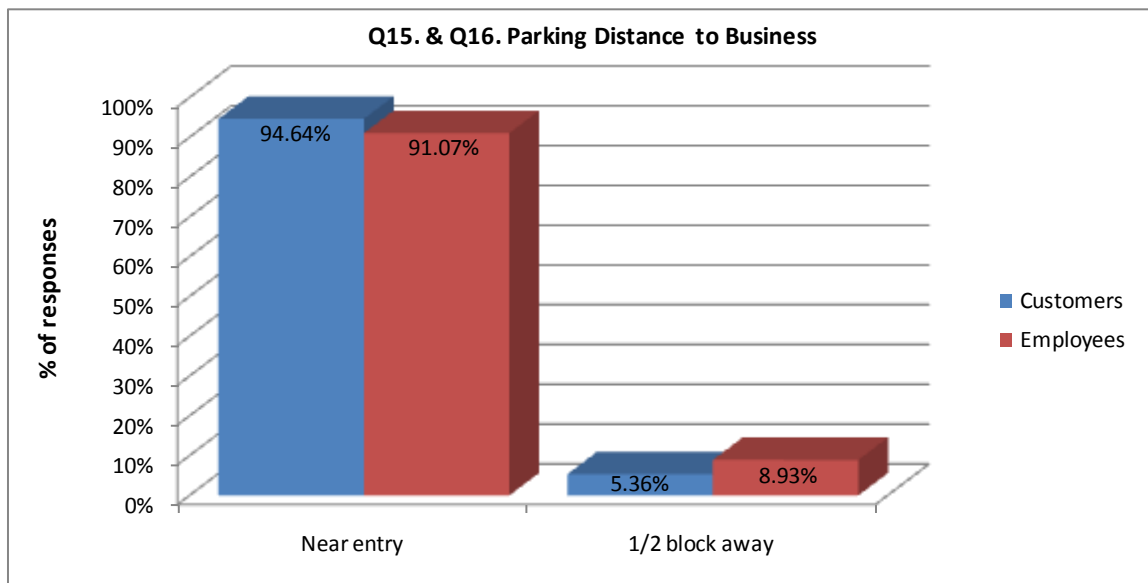
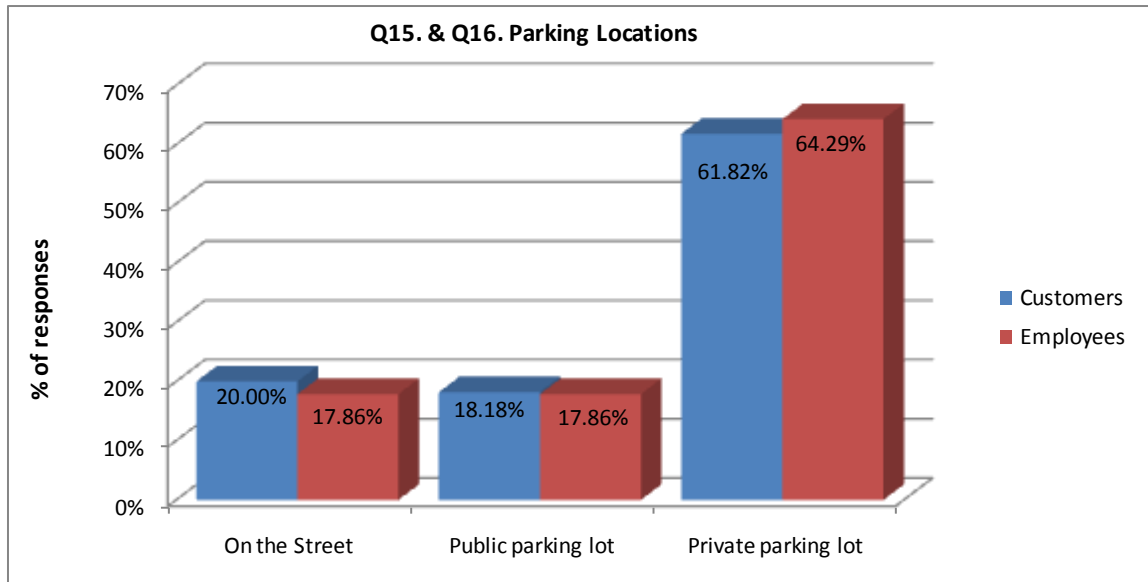
Of those responding, 11.3 percent stated their square footage of operation was between zero and 100 square feet, 13.2 percent replied that their size of operation was between 201 and 300 square feet, and 17.0 percent replied their size of operation was between 501 and 1,000 square feet. These three square foot business size segments made up 41.5 percent of businesses that replied to this question.



Parking – Customers and Employees (Q15 & Q16)

These questions were nearly identical – both were two-part questions. Question 15 addressed customer parking and question 16 addressed employee parking. Participants were first asked “Where do your [customers or employees] typically park? They were asked to select one answer (e.g. street, parking lot).

Next they were asked "How far do [customers or employees] typically have to park from your business?" They were asked to select one answer (e.g. near entry, 1 block away). A majority reported that customers and employees parked in private parking lots and parked near the entry of the business.

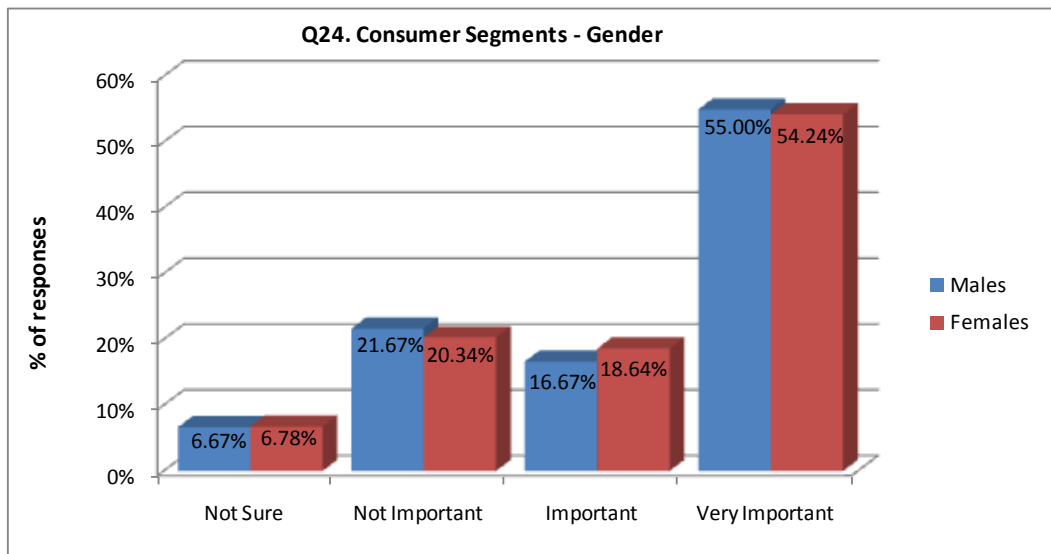


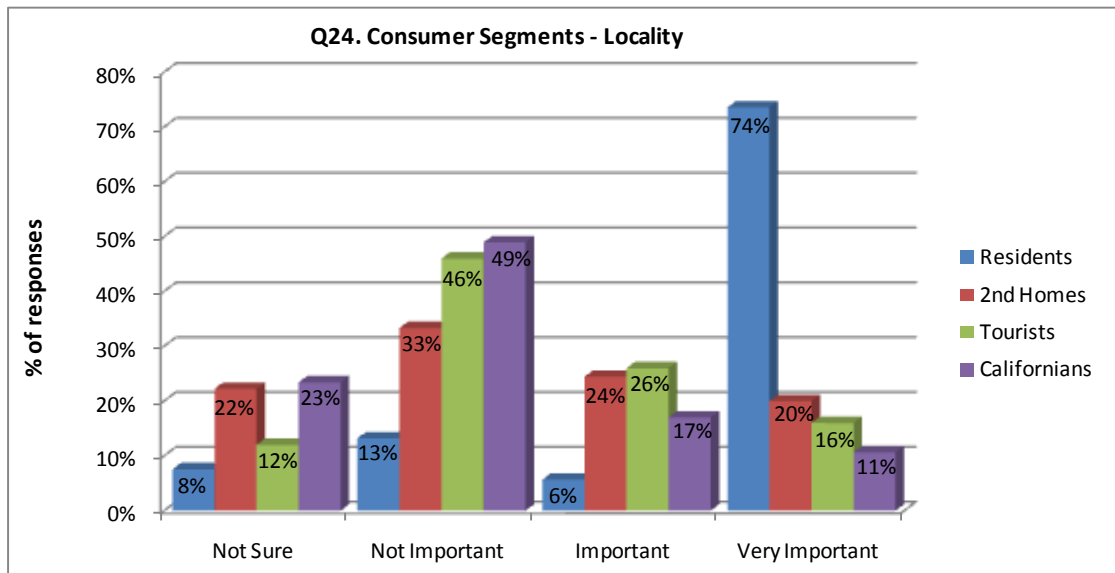
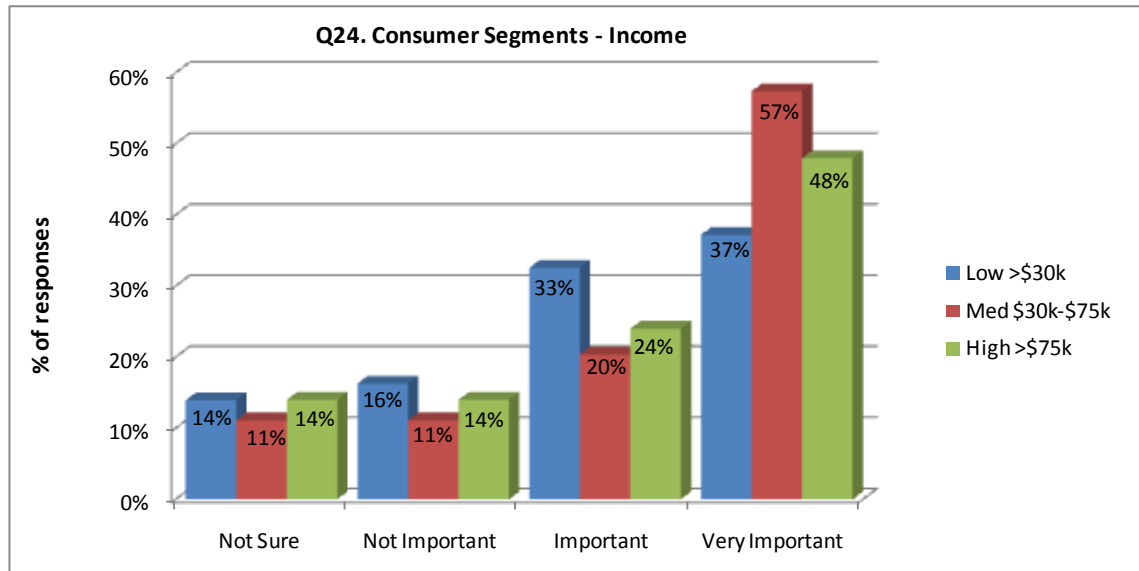
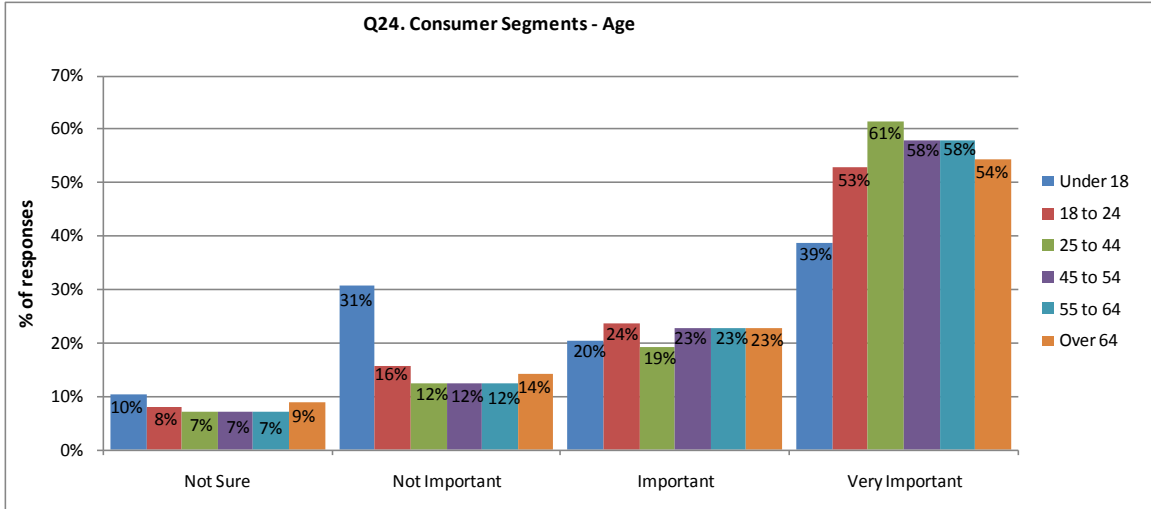
▪ *Marketing*

How important are the following consumer segments to your business? (Q24)

This was a four-part question. Participants were asked to consider the importance of four distinct consumer groups – gender, age, household income, and segment (Battle Mountain residence status). Each group was further broken down into subcategories (e.g. “Male” and “Female” under “Gender”). Participants were asked to choose one level of importance (e.g. “Important”, “Not Important”) for each subcategory. Response numbers ranged from a high of 60 for “Males” (subcategory of “Gender”) to a low of 43 for “Low (\$0 to \$30,000)” (subcategory of “Household Income”).

Percentages reflect the selection frequency within each subcategory. The subcategories selected as “Very Important” most frequently were males 25 to 44 with medium household incomes (\$30,000 to \$75,000) that are residents of Battle Mountain. The subcategories selected as “Not Important” most frequently were males under 18 with low household income (under \$30,000) that are residents of California.





Describe your business's E-Commerce (Q30 – Q36)

This set of questions addressed business use of websites and online merchandising. Questions 31 and 34 were open-ended questions – the remainder provided “Yes” and “No” checkboxes.

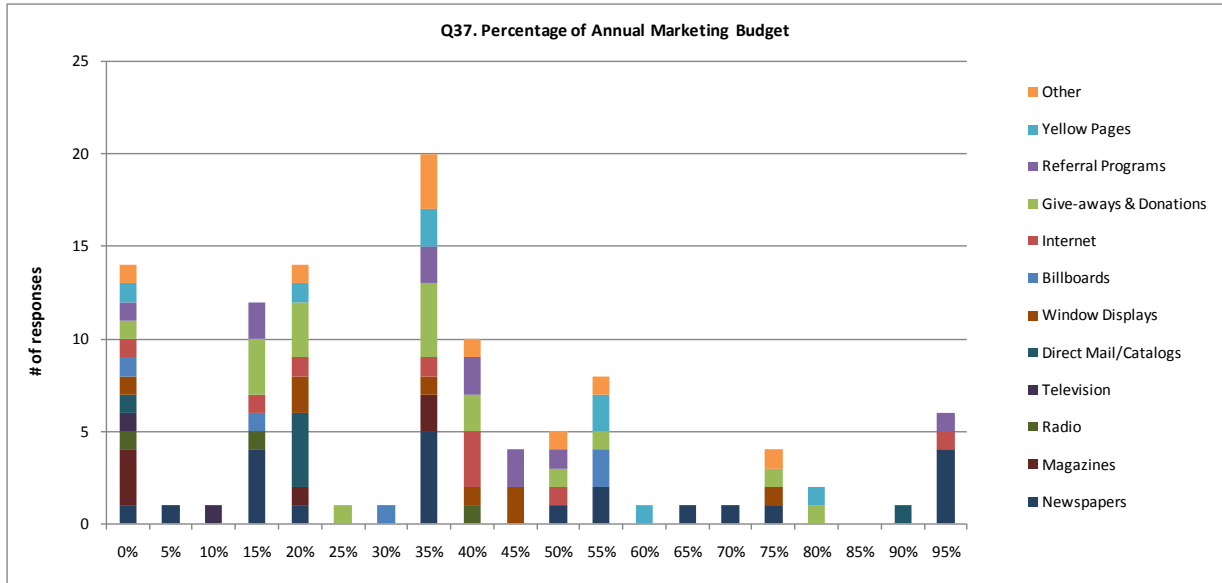
An overwhelming majority of Battle Mountain businesses did not appear to utilize electronic commerce in their operations. With the expanding internet, mobile phone market, and use of social media in retail marketing, this is an area of potential training in Battle Mountain.

	Yes	No	Response
Q30. Do you have a website?	18 30.51%	41 69.49%	59 93.65%
Q31. If yes, average monthly traffic (as unique visitors)?	- -	- -	6 9.52%
Q32. If no, do you plan on launching one?	16 34.78%	30 65.22%	46 73.02%
Q33. Do you sell products or services online?	7 11.48%	54 88.52%	61 96.83%
Q34. If yes, what percent of sales are online?	- -	- -	7 11.11%
Q35. If no, do you plan to sell products/services online?	13 23.64%	42 76.36%	55 87.30%
Q36. Do you communicate w/ your customers by email?	26 44.83%	32 55.17%	58 92.06%

What percentage of your annual marketing budget is spent with each of the following media (Total=100)? (Q37)

Participants were asked to fill in their percentage of marketing budget allocated to 12 predefined categories (including an “Other” category) or allocate 100 percent to “I don’t advertise”. The highest response rate was for “Newspapers” at 34.9 percent. The lowest response rate was 3.17 percent – a tie between “Television” and “I don’t advertise”.

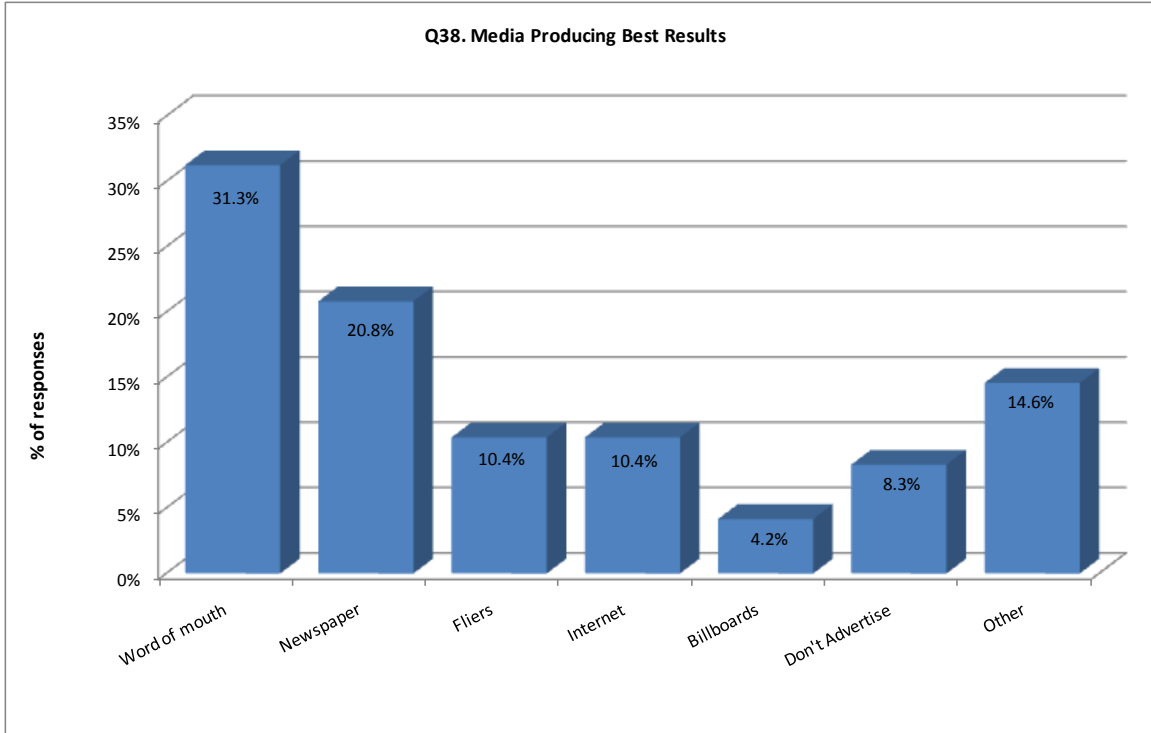
“Newspapers” were reported to be the most utilized media with an average marketing budget percentage of 39.82 percent, followed closely by “Yellow Pages” with an average marketing budget percentage of 35.63 percent. The media receiving the lowest budget share was “Television” at 1.5 percent. “Magazines” were the second lowest at 8.33 percent. The lack of internet, mobile phones, and social media use needs to be addressed by Battle Mountain business operators.



What media has produced the best results for you? (Q38)

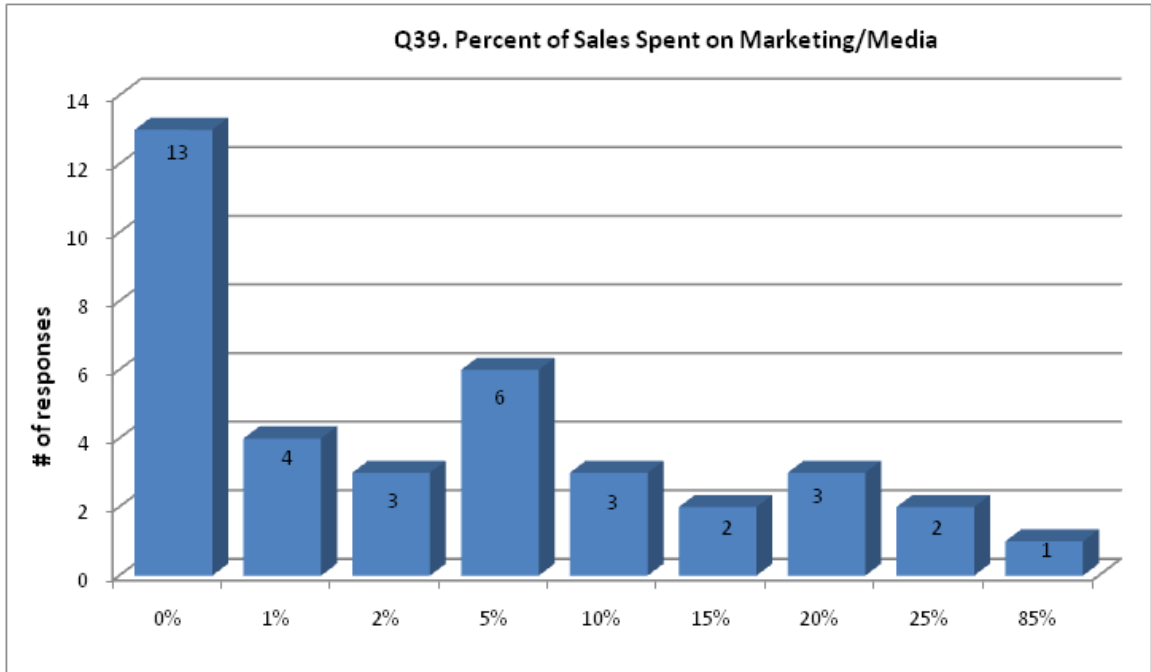
This was an open-ended question. Participants were asked to state what media has been most successful for their business. There were 48 responses in total.

In order to report the findings simplistically, responses were categorized into seven categories such as newspapers, fliers, etc. Each constructed category was recorded by at least two respondents. These descriptors are intended to efficiently capture the nature of each statement. An individual statement may have been categorized in more than one category. For example, a statement such as “billboards & newspapers.” would have been classified in both “billboards” and “newspaper”. Results showed the largest media producing best results was word-of-mouth. Recall that word-of-mouth in an earlier section of this paper referred to dealing with mobile phones and social media. This avenue should be studied.



What percent of your sales is spent on marketing and media? (Q39)

Participants were asked to write-in this information. All but one respondent reported spending 25 percent or less of sales on marketing and media. A large number of respondents stated that they spent no funds on marketing media.

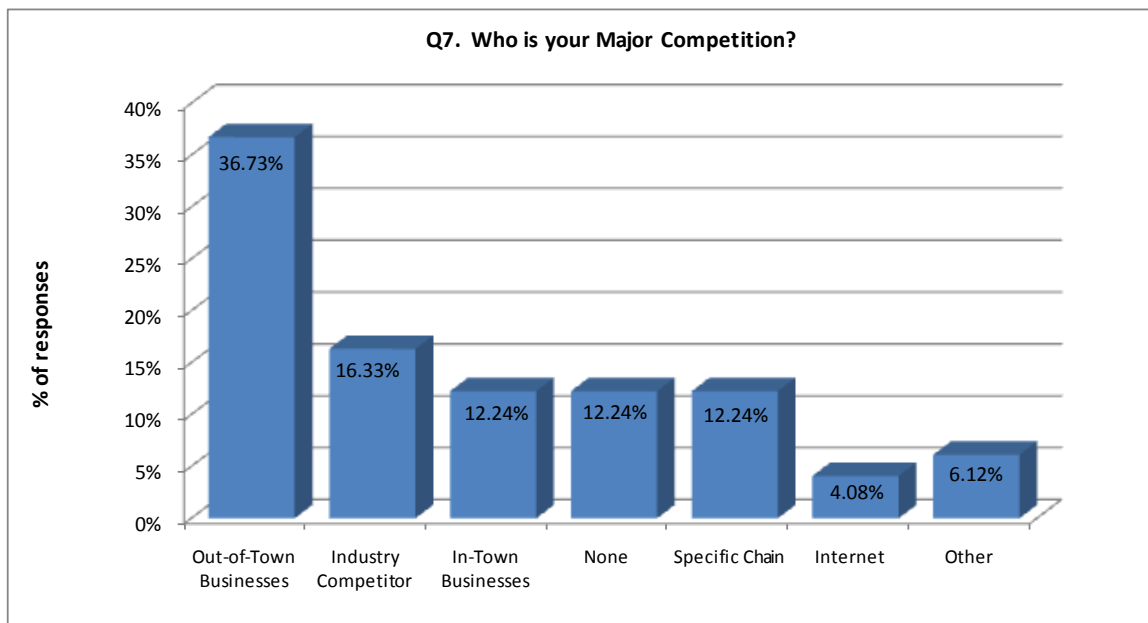


Other Businesses – Competition and Complements

▪ Competition

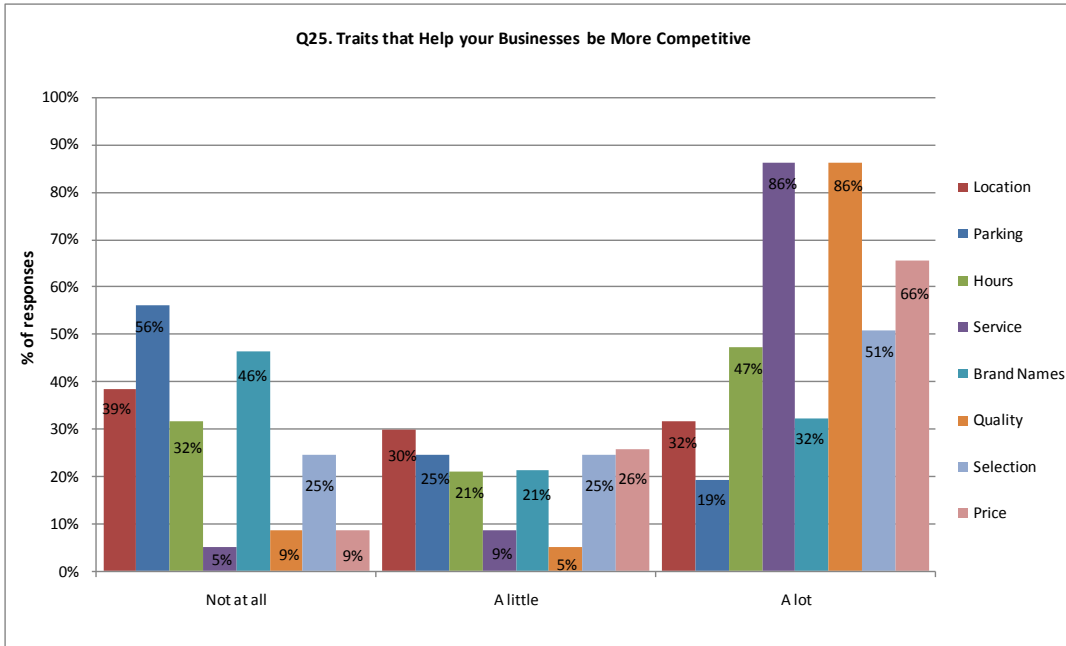
Who do you see as a major competition (local or out of town)? (Q7)

This was an open-ended question. Participants were asked to write-in their major competitors. In order to report the findings simplistically, responses were categorized into seven categories such as internet, specific chain, etc. Each constructed category was recorded by at least two respondents. These descriptors are intended to efficiently capture the nature of each statement. In some cases the respondent may have provided more than one competitor. A majority of respondents felt that out-of-town businesses were their major competitor.



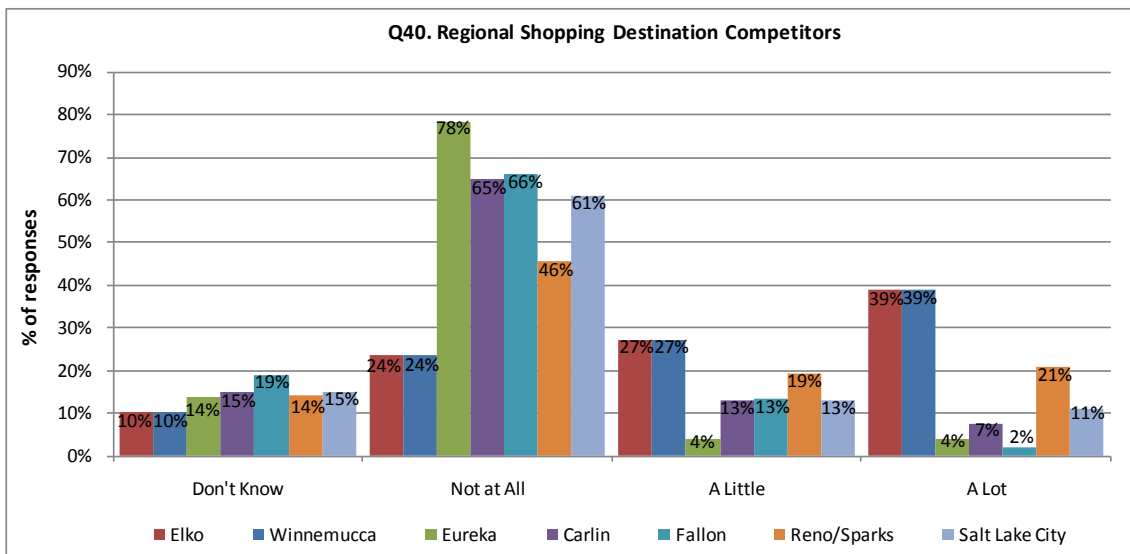
Do the following traits help make your business more competitive? (Q25)

Participants were asked to choose the degree ("A lot", "A little", "Not at all") to which each characteristic bolstered their competitiveness. "Quality" (86 percent) and "Service" (85 percent) were reported to have the largest impact on competitiveness, while "Parking" and "Brand Names" appeared to have the least competitive influence.



Thinking regionally, how much do you compete with the following shopping destinations?? (Q40)

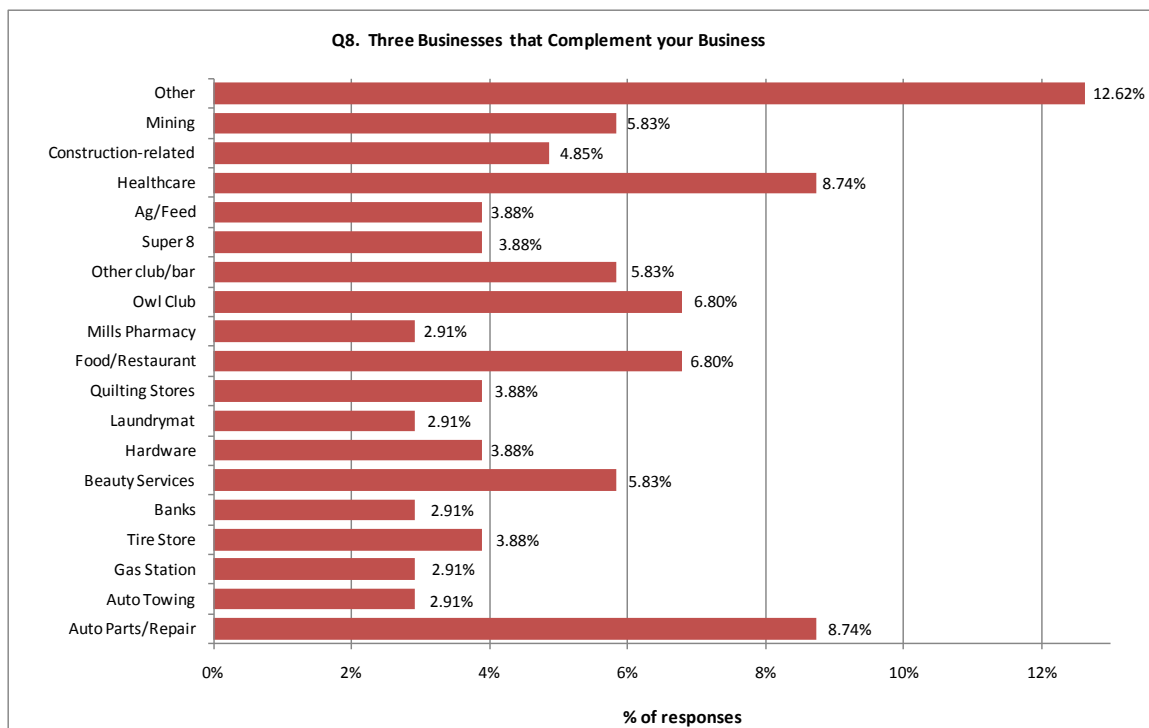
Participants were asked to choose the degree (e.g. "A lot", "Don't Know") to which each location competes with Battle Mountain businesses for consumers. Elko and Winnemucca were reported to be the most competitive areas with 66 percent of respondents selecting "A Little" or "A Lot" for these areas. Eureka, Fallon, and Carlin were reported as the least competitive with respondents selecting "Not at All" 78 percent, 66 percent, and 65 percent of the time respectively. It should be noted that Elko and Winnemucca have big-box retail stores.



▪ *Complements*

What THREE businesses complement your businesses the most? (Q8)

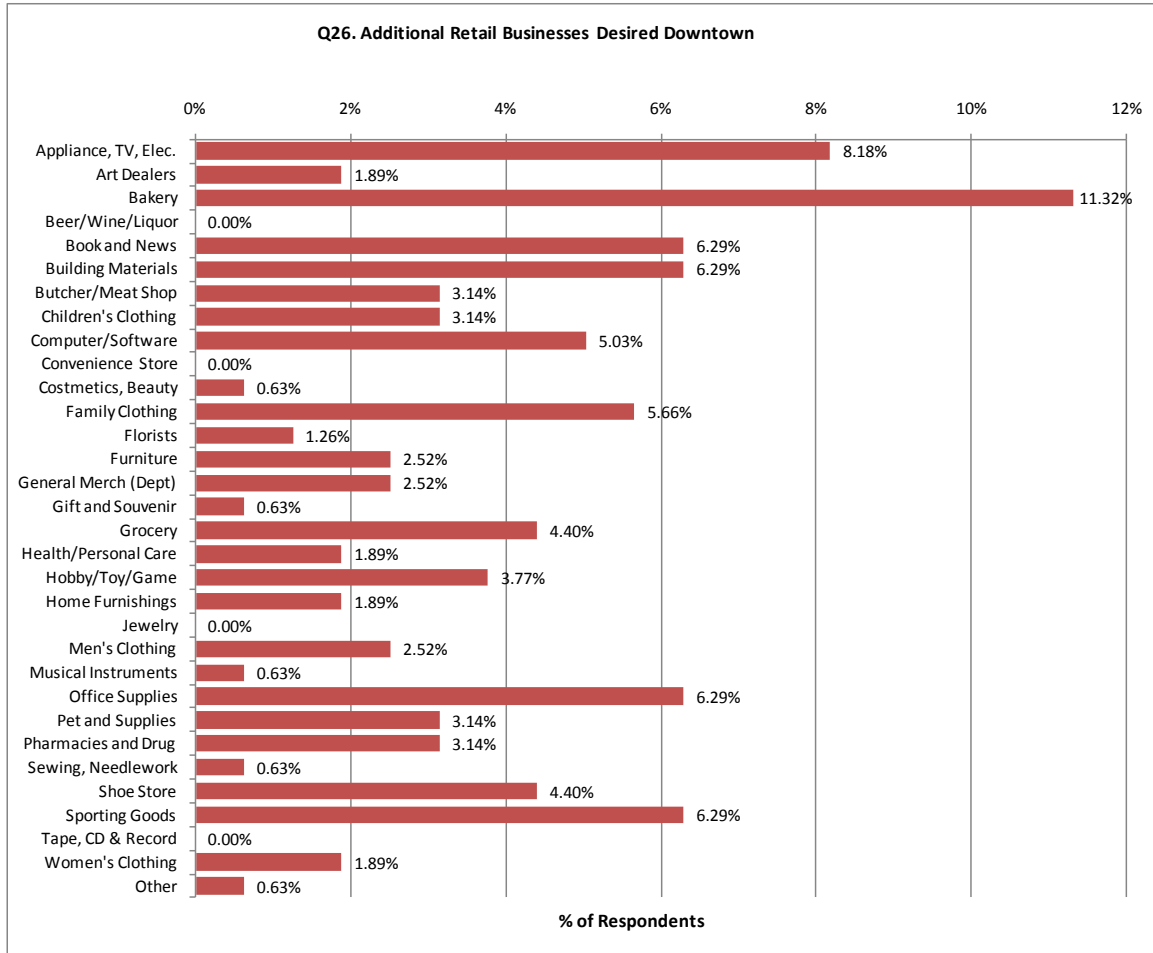
This was an open-ended question. Participants were asked to write-in three complementary businesses. The question did not specify whether general (restaurant) or specific (“Joe’s Diner”) businesses should be listed. A wide variety of general (restaurant) and specific (“The Owl Club”) businesses were listed. The graph below reflects responses given by three or more respondents. Specifically named businesses represent only that business. Generally named businesses may or may not contain specifically named businesses recorded by less than three respondents.

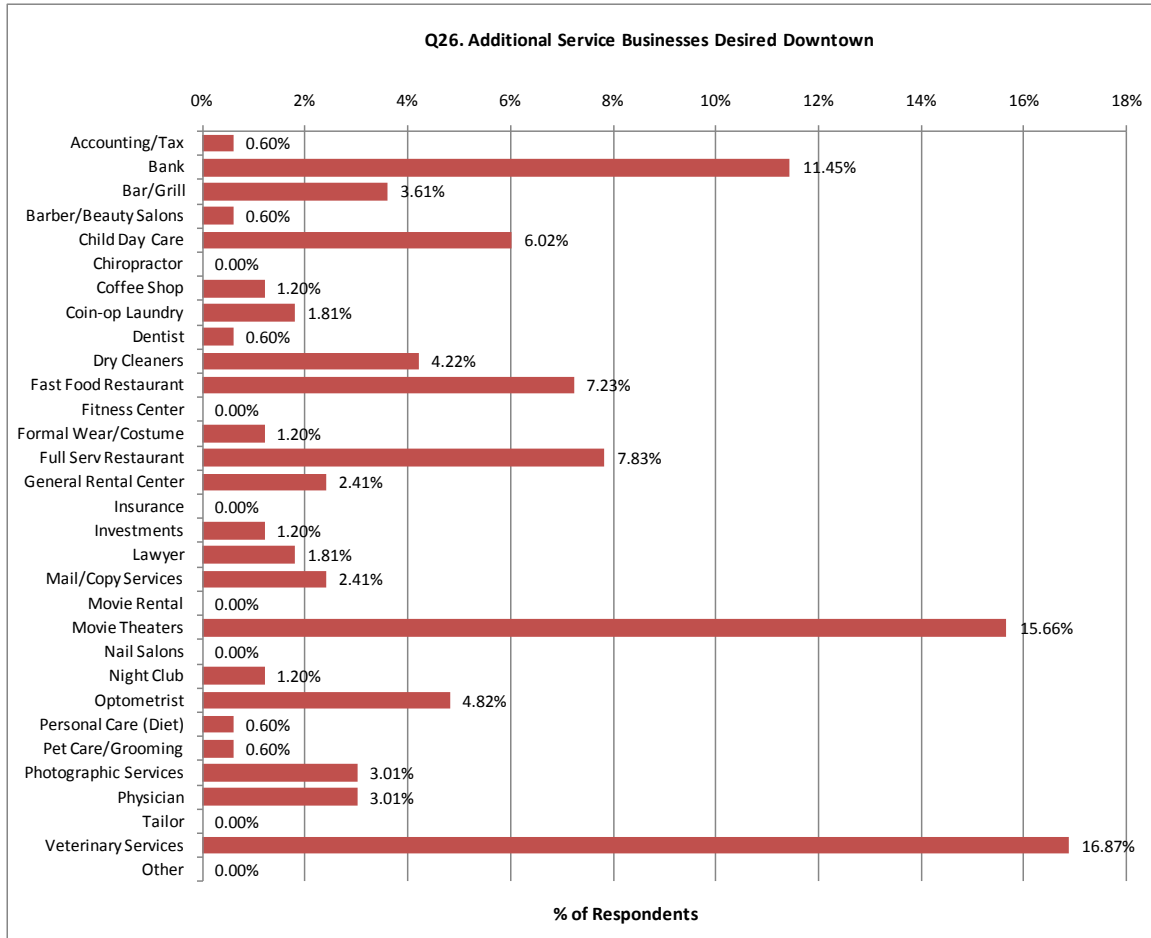


What FOUR additional businesses would you most like to see downtown? (Q26)

This was a two-part question. Participants were first asked to select four of 32 types (including write-in “Other” type) of retail businesses that are desired downtown. Next they were asked to select four of 31 types (including write-in “Other” type) of service businesses that are desired downtown. Responses were excluded for respondents selecting more than four types of retail businesses or more than four types of service businesses. One hundred and sixty-seven “Retail Businesses” were recorded with a response rate of 66.27 percent. One hundred and seventy “Service Businesses” were recorded with a response rate of 67.46 percent.

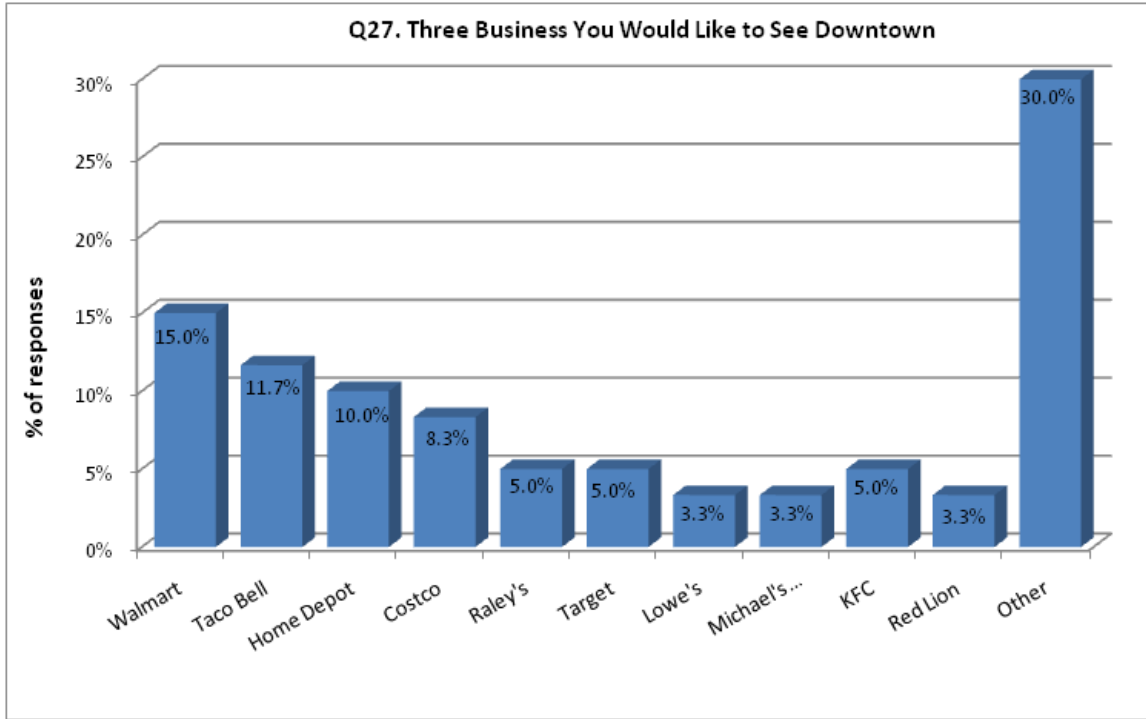
A bakery and appliance, television and electronic retail store were the highest two retail stores desired in Battle Mountain. For desired service business, the top two service businesses desired were veterinary services and movie theaters.





Name up to THREE businesses you would like to see come to downtown? (Q27)

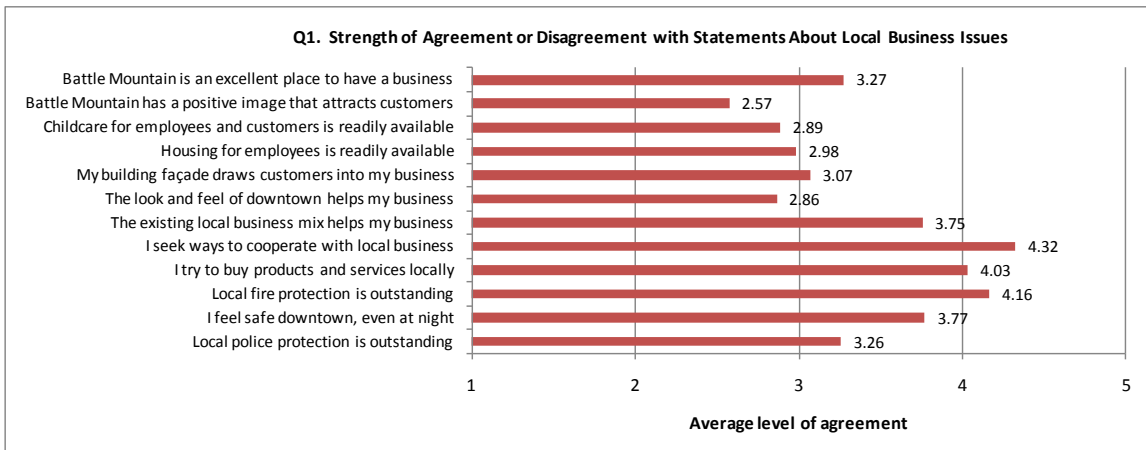
This was an open-ended question. Participants were asked to write-in three complementary businesses. The question specified that a specific (“Joe’s Diner”) name or chain should be listed, thus general business responses were excluded. The exclusion rate averaged 28.05 percent across the three opportunities to list a business name. Twenty-five respondents provided at least one business name, with an average response rate of 33.33 percent. One hundred and three responses were provided in total. “Other”, businesses not specifically named, received the highest responses. As to firms named, Walmart received the highest response followed by Taco Bell and Home Depot.



Community Perspectives

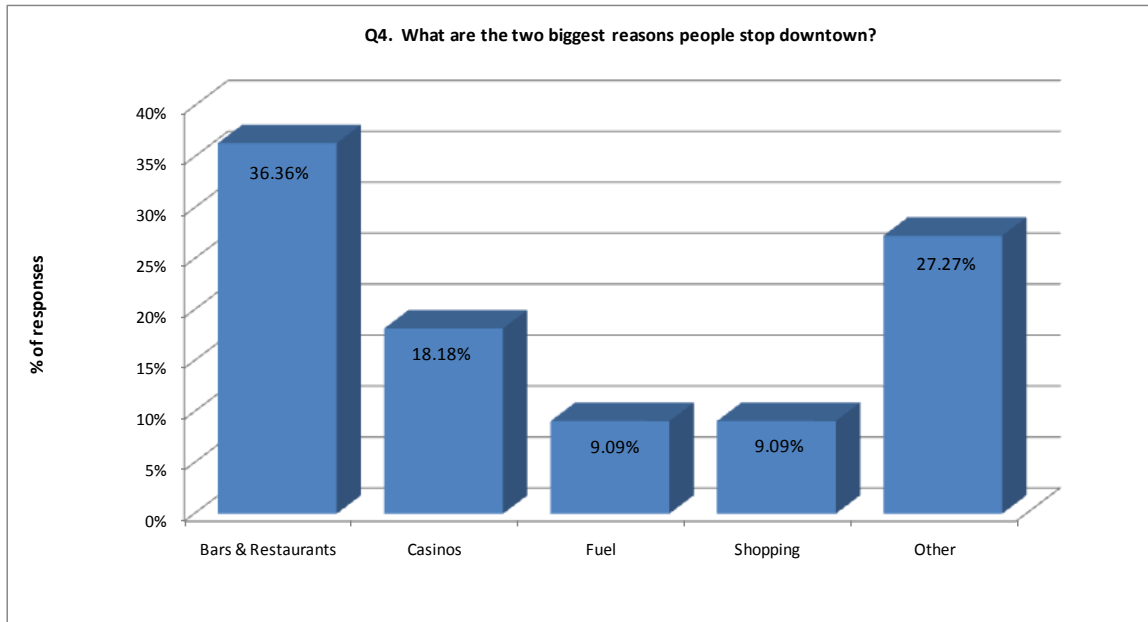
How strongly do you agree or disagree with the following statements? (Q1)

Participants were asked to state the degree to which they agreed or disagreed with a variety of statements about Battle Mountain as it relates to the business environment. Answers ranged from “Strongly Disagree” (value = 1) to “Strongly Agree” (value = 5). The statement with the highest agreement was, “I seek ways to cooperate with local businesses.” The statement with the strongest disagreement was, “Battle Mountain has a positive image that attracts customers.” This was probably from the New York Times article and its impact on Battle Mountain.



What are the TWO biggest reasons people stop downtown? (Q4)

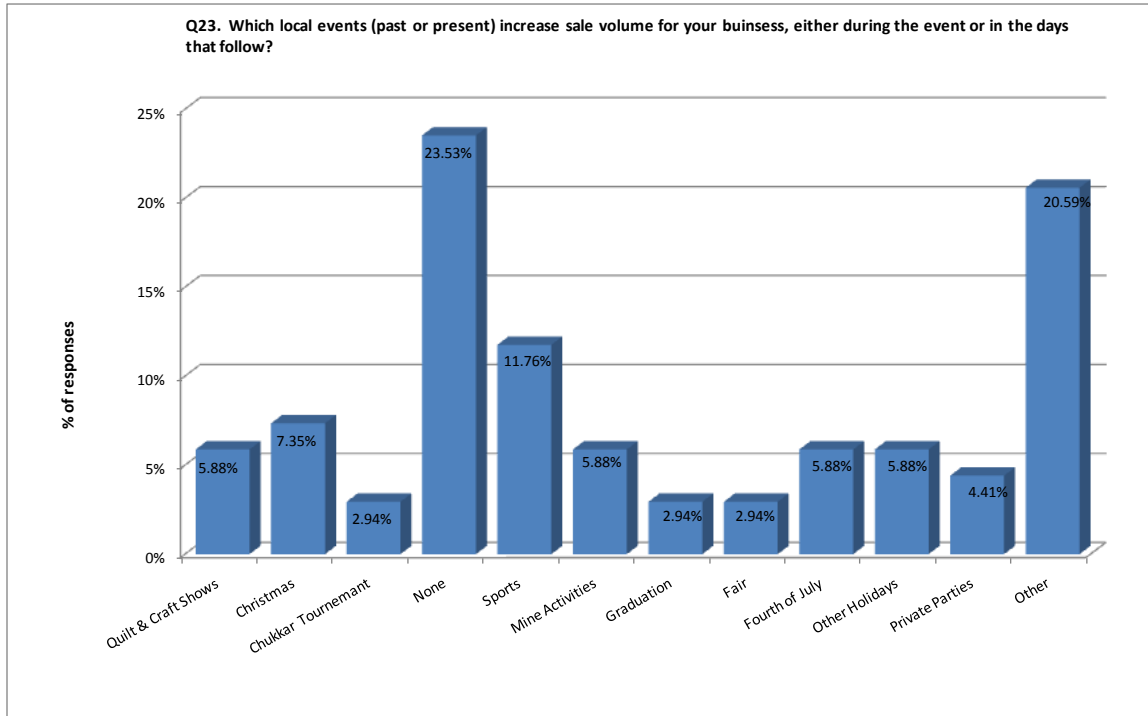
This was an open-ended question. Participants were asked to provide two reasons (e.g. attraction, activity) why people visit downtown Battle Mountain. The highest response as to why people stop in downtown Battle Mountain was for bars and restaurants. Shopping had the lowest, which impacts local retail activities.



Which local events (past or present) increase sales volume for your business, either during the event or in the days that follow? (Q23)

This was an open-ended question. Participants were asked to provide up to five events that boost sales in downtown Battle Mountain. At least 39 respondents provided at least one event, only two respondents provided five events. Sixty-eight responses were provided in total.

In order to report the findings simplistically, responses were categorized into 12 categories. Each constructed category was recorded by at least two respondents. "Other" represents events listed only once. It should be noted that "None" was repeated by the largest percentage of respondents. Additionally, one respondent noted that events take away business from downtown merchants – another respondent noted that people do not go to downtown Battle Mountain to shop. However, one of the positive responses was sports, which is related to Battle Mountain High School activities.



Which downtown buildings could be more productively used to create more economic activity for the district? (Q28)

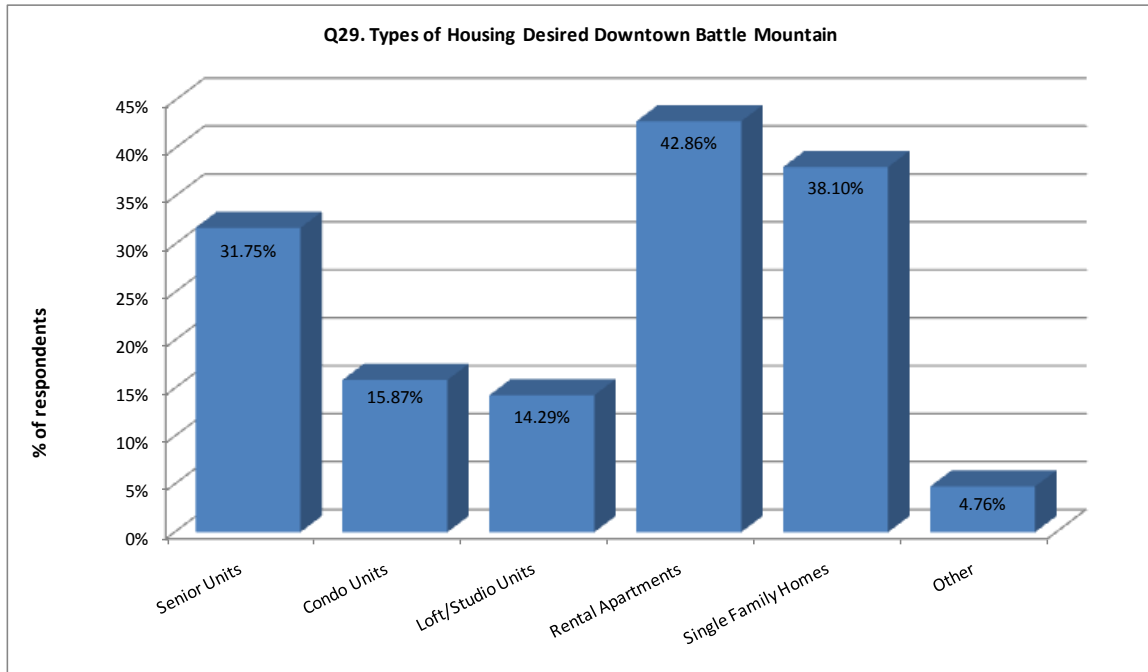
This was a two-part open-ended question. Participants were first asked to suggest a specific location that could be improved to increase general economic activity in Battle Mountain. Then, participants were asked to suggest for what the improved space could be better used. Response was relatively low for both parts. Twenty-four respondents provided at least one specific location – a response rate of 38.1 percent. Only 17 respondents provided suggestions for site use – a response rate of 26.98 percent.

The most frequent suggestion for specific location improvement was the Lemaire Building, written in by 33.33 percent of the respondents. This was closely followed by a more general suggestion of “anything on Broad or Front streets” – provided by 29.17 percent of respondents.

The most frequent usage suggestion was “any business” provided by 17.65 percent of respondents. This was followed by “something for kids” suggested by 11.77 percent of respondents.

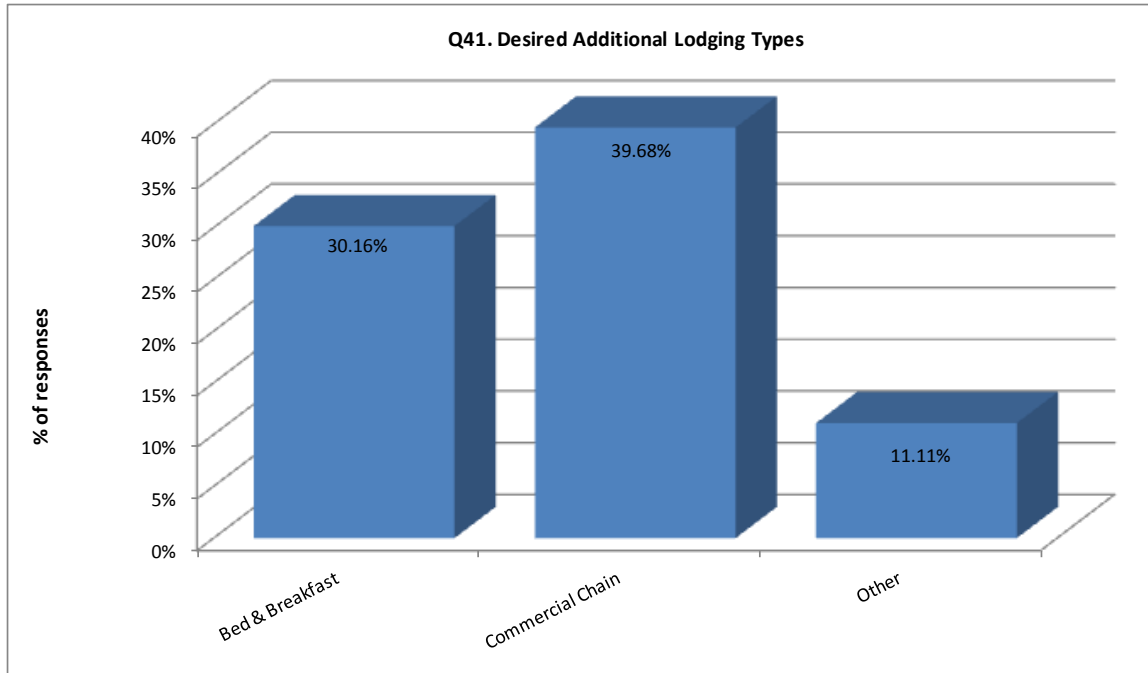
What types of housing would you like to see added to downtown? (Q29)

Participants were asked to select all housing types they wished to see developed in downtown Battle Mountain. The graph below reflects all housing types available for selection within the written survey. Rental apartments and single-family homes were the highest selected housing types desired in downtown Battle Mountain.



What additional types of lodging accommodations are needed in Battle Mountain? (Q41)

Participants were asked to select all lodging types they wished to see in Battle Mountain. The graph below reflects all housing types available for selection within the written survey. "Other" lodging types suggested included campground, "top-of-the-line" hotel, and temporary studio housing for mine workers. The highest response was for "Commercial Chain" followed by "Bed and Breakfast".



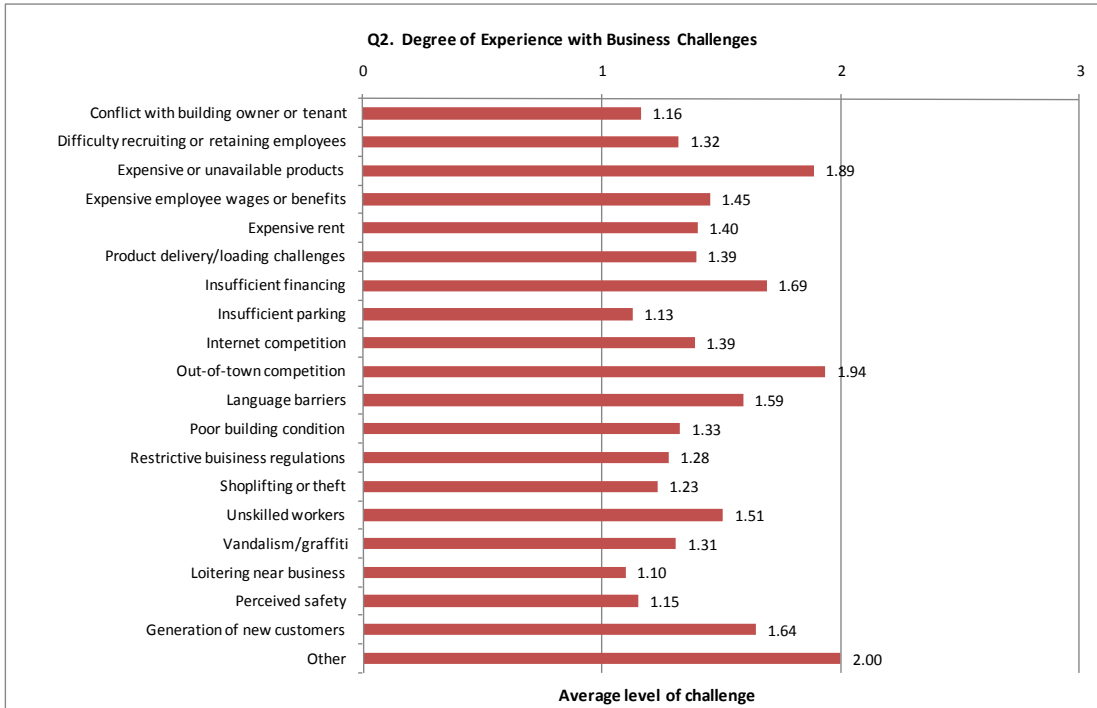
Business Challenges and Desired Assistance

▪ Challenges

Please rate the degree to which you are experiencing the following business challenges. (Q12)

Participants were asked to state the degree to which their business was challenged by a variety of issues such as crime, production requirements, and trade issues. Answers ranged from "Don't Know" (value = 0) to "Major Challenge" (value = 3).

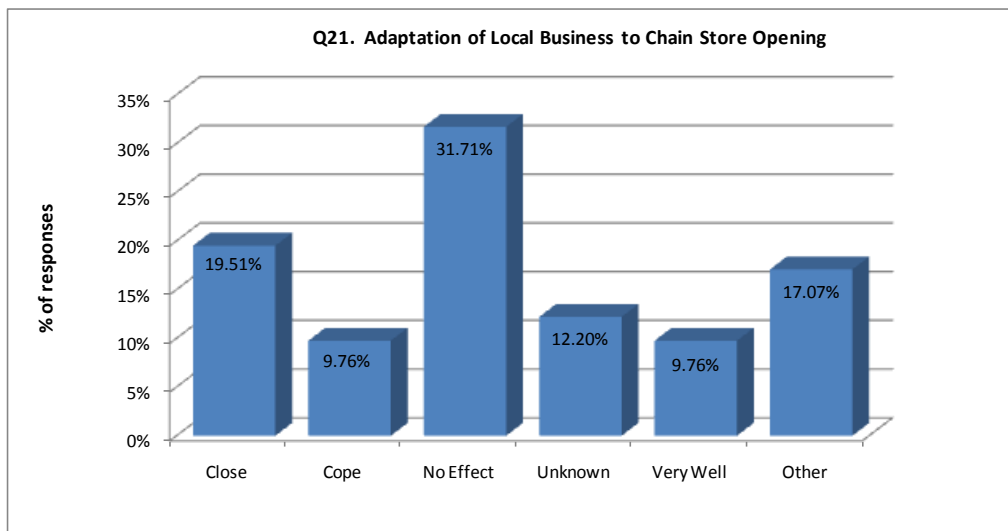
The values in the graph below represent the average degree of challenge experienced by the given statement. "Other" written answers provided included "local advertising", "competition with local businesses", and "local mining doesn't support our business". Of those statements enumerated, the two major challenges reported were "Out-Of-Town Competition" and "Expensive and Unavailable Products". The lowest perceived challenges were "Loitering Near Businesses" and "Insufficient Parking".



If additional chain stores were to open in the area how would you adapt? (Q21)

This was an open-ended question. Participants were asked to discuss how they would adapt to more chain stores opening in the Battle Mountain area.

In order to report the replies simplistically, responses were categorized into six categories. Each constructed category was recorded by at least two respondents. "Other" represents events listed only once. The highest response by Battle Mountain businesses was "No Effect" followed by businesses stating the closure of Battle Mountain businesses.

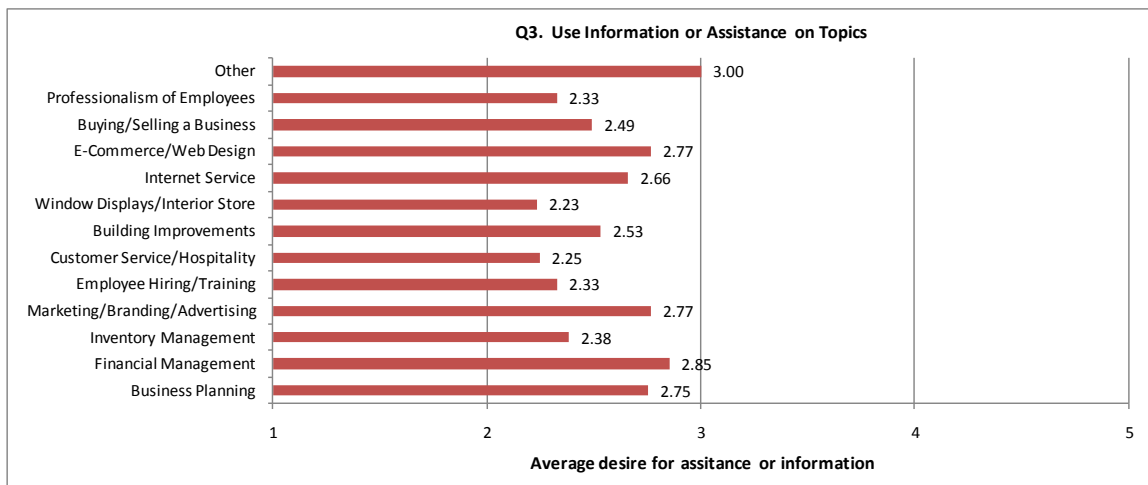


▪ Assistance

Could you use information on or assistance with the following topics? (Q3)

Participants were asked to state their level of interest in gaining assistance with a variety of general business topics (e.g. marketing, web design, financial management). Answers ranged from “Definitely Not” (value = 1) to “Definitely” (value = 5).

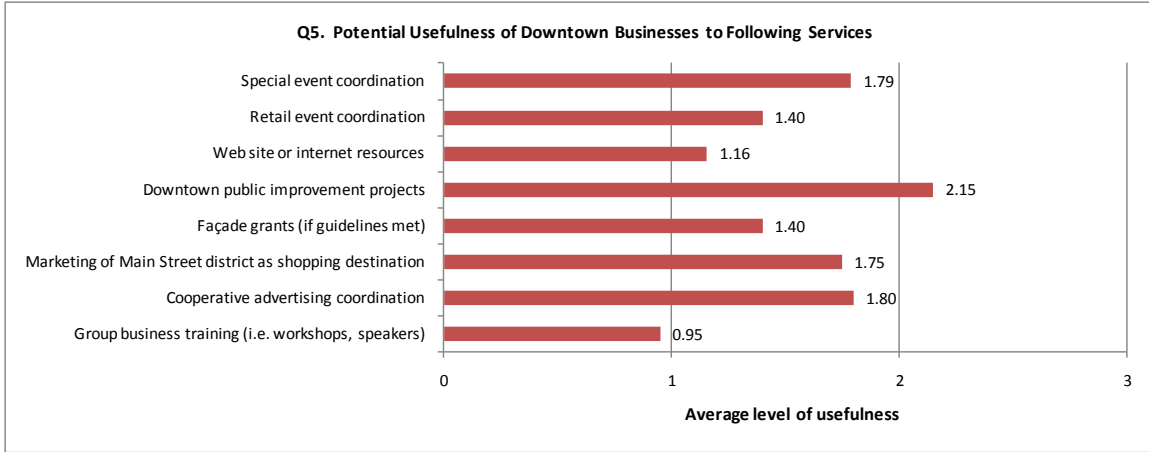
The values reflected in the graph below represent the average level of interest for the given statement. The three categories with the highest need were “Financial Management”, “Marketing/Branding/Advertising” and “E-Commerce/Web Design”. “Other” had the highest response, which could be a combination of all topics.



How useful to your downtown business are (could be) the following services? (Q5)

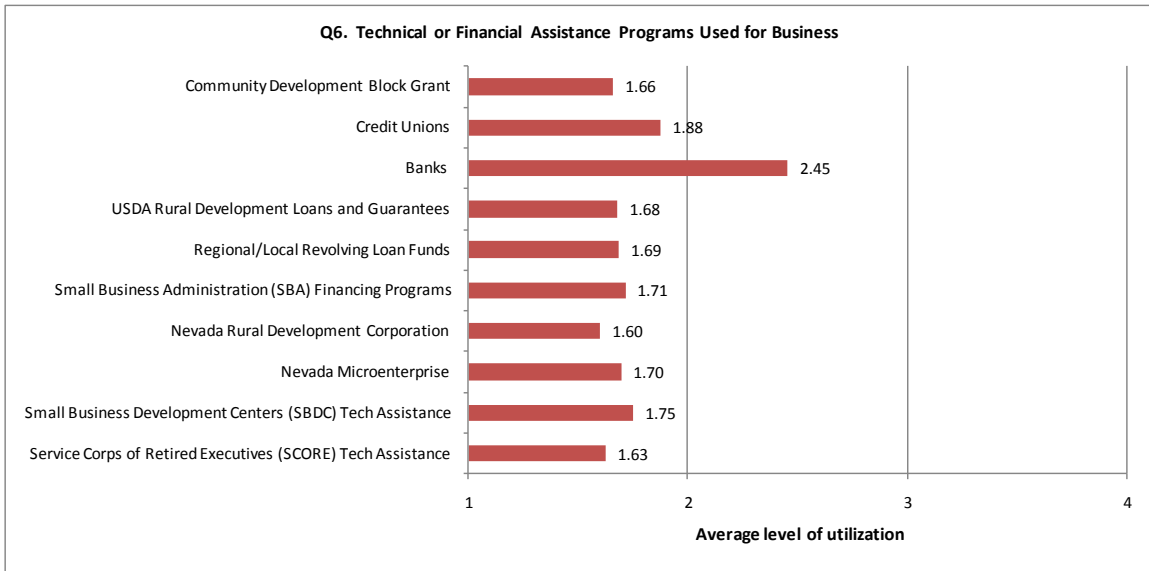
Participants were asked to state the level of usefulness of a variety of support services such as cooperative marketing and community improvements. Answers ranged from “Don’t Know” (value = 0) to “Very Useful” (value = 3).

The values reflected in the graph below represent the average level of usefulness for the given service. The highest downtown activity was “Downtown Public Improvement Projects” followed by “Cooperative Advertising and Special Events”.



Which technical or financial assistance program(s) have you used for your business? (Q6)

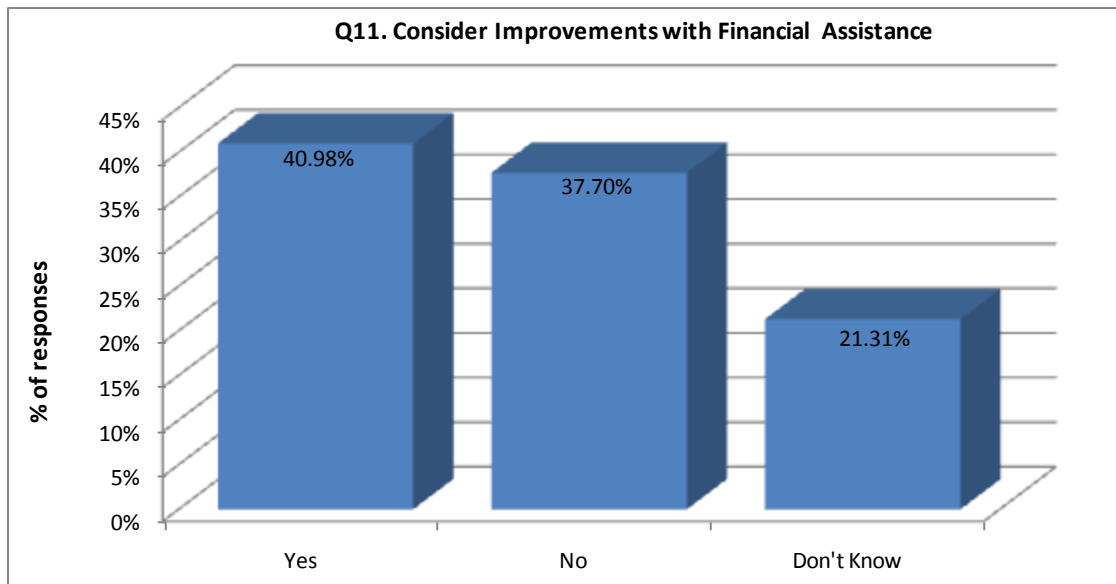
Participants were asked to state whether or not they had used and/or were familiar with a variety of financial assistance programs. Answers ranged from “Won’t Use” (value = 1) to “Used in Past Year” (value = 4). Banks were reported as being used the most for technical and financial assistance followed by credit unions and Small Business Development Center technical assistance.



If financial assistance were available, would you consider building improvements such as façade work or new signage? (Q11)

Participants were asked to state if they would be interested in taking advantage of available improvement programs (hypothetically). Approximately 41

percent of Battle Mountain business operators replied that they would consider improvements with financial assistance, while 38 percent would not.



Comments

There was no final section included for respondents to record general thoughts or comments. However, several respondents wrote in comments nonetheless. The following is a sampling of some comments of interest.

- Owner is only employee. Out-of-business due to the economy.
- The business I manage is part of a larger corporation. This business sells to other businesses.
- In business since 1986 (welding and manufacturing).
- Battle Mountain doesn't do a thing to help current businesses or to promote getting new business. They have turned down a few businesses wanting to open here also....I feel no business is going to be supported as people go to cheap shopping [elsewhere].

Conclusions

- The majority of businesses in Battle Mountain have been owned for either a relatively short amount of time (less than five years) or a very long time (more than 20 years).
- The combined number of employees and owners for Battle Mountain businesses is quite small – the weighted averages are 1.2 fulltime, 1.78 part-time, and 1.36 seasonal.
- Operating hours barely fluctuate between the busy and slow seasons. The average number of operating hours reported for the busy season was 11.27 and for the slow season, 11.43.

- The majority of business owners responding, 63.16 percent, had no plans to either expand or reduce operations. For those that did plan on changing operations, they planned on expanding outside of the downtown area.
- Walmart is the most desired chain.
- The most desired retail business for downtown Battle Mountain is a bakery.
- The most desired service business for downtown Battle Mountain is a veterinarian.
- Business owners reported men and women, all age groups, and all income levels as important consumer segments. The only reported segment differentiation related to residence. Owners reported that Battle Mountain residents were very important while tourists and Californians were not important.
- Battle Mountain business owners engage in very little e-commerce including maintaining business websites and/or online sales.
- In general, the reporting owners said that they spent 25 percent or less of their sales revenue on marketing expense. Newspaper and word-of-mouth marketing are the most commonly utilized marketing tools.
- Out-of-town businesses were reported as the number one source of competition, as well as the biggest challenge to operations. Elko, Winnemucca, and Reno/Sparks exert the biggest draw.
- Owners disagreed with statements such as "Battle Mountain has a positive image that attracts customers" and "The look and feel of downtown helps business".
- Bars and restaurants are the strongest downtown attraction.
- Owners reported that special events do not help bolster downtown business.
- Battle Mountain business owners reported very little interest in receiving information or assistance to improve or strengthen their operations. The small amount of interest shown was for information or assistance with financial management or e-commerce.
- Owners reported using very few, if any, assistance measures such as grants or loans. Banks were the only reported source of assistance used.
- Owners seemed wary or unsure of whether they would consider business improvements if financial assistance were available. Forty-one percent said they would be interested, 38 percent said they would not be interested, and 21 percent said they were unsure.

SECTION III

**NEEDS AND PERSPECTIVES OF
BATTLE MOUNTAIN CONSUMERS**

SECTION III

NEEDS AND PERSPECTIVES OF BATTLE MOUNTAIN CONSUMERS

Battle Mountain, an unincorporated municipality, is the county seat and largest community in Lander County, Nevada. Historically, the Battle Mountain economy has been prone to “boom and bust” cycles influenced largely by regional mining activity. This survey sought to understand consumer preferences regarding current and potential businesses so these preferences may be incorporated in local economic development to encourage a healthy and enduring retail sector in Battle Mountain.

Survey Overview

This survey was designed in part using previous consumer preference surveys generated by a variety of other land grant cooperative extension programs. It was then reviewed and modified to best address consumers’ interests specific to the Battle Mountain community. A separate survey targeted at Battle Mountain business owners was conducted just prior, and while few questions overlap, it was intended to be analyzed in conjunction with the consumer survey.

Types of Questions

- Battle Mountain shopping and dining patterns: where, when, and why [current and ideal].
- General shopping and dining patterns: where and why.
- Preferences for shopping location across types of goods.
- Preference demographics: media outlets, activities, community ideals.
- General demographics: age, education, income, etc.

Survey Distribution and Response

Because the population of Battle Mountain is relatively small (2,871 as of the 2000 census), the entire population was targeted for the consumer survey. The Dillman Method was employed across all stages of survey design and implementation (Dillman et al., 2009).

The total number of consumers surveyed was 1,682. The addresses were obtained from Allegra Printing and reflect all current Battle Mountain addresses. Each address was sent a single survey. The first survey round was implemented by mail on July 16, 2010. On August 17, 2010, a reminder postcard was sent to 1,316

addresses that had either not yet responded or for whom no invalid address notification had been received. In lieu of a formal notification letter mailing (the Dillman Method preference), notifications were posted in the local paper, the *Battle Mountain Bugle*, prior to both the mailing of the initial survey and the reminder postcard.

The total number of surveys returned during the initial round was 266 – a survey response rate of 15.82 percent. An additional 39 surveys were received after sending the reminder postcards. This increased the overall response rate to 18.13 percent (305 completed responses).

Survey Response

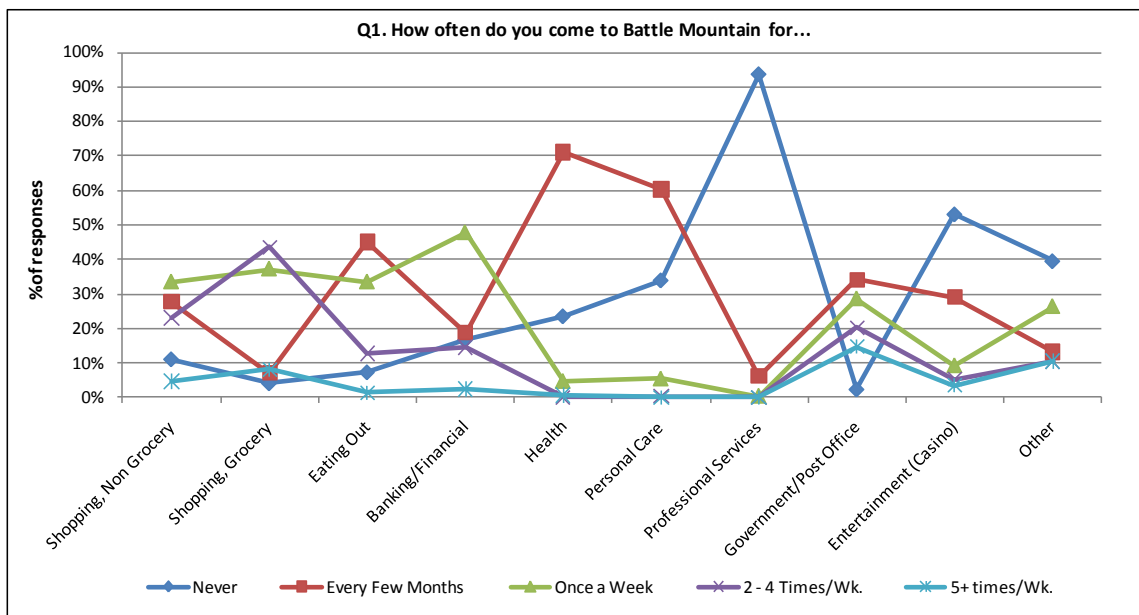
Battle Mountain Shopping Patterns: Where, When, and Why

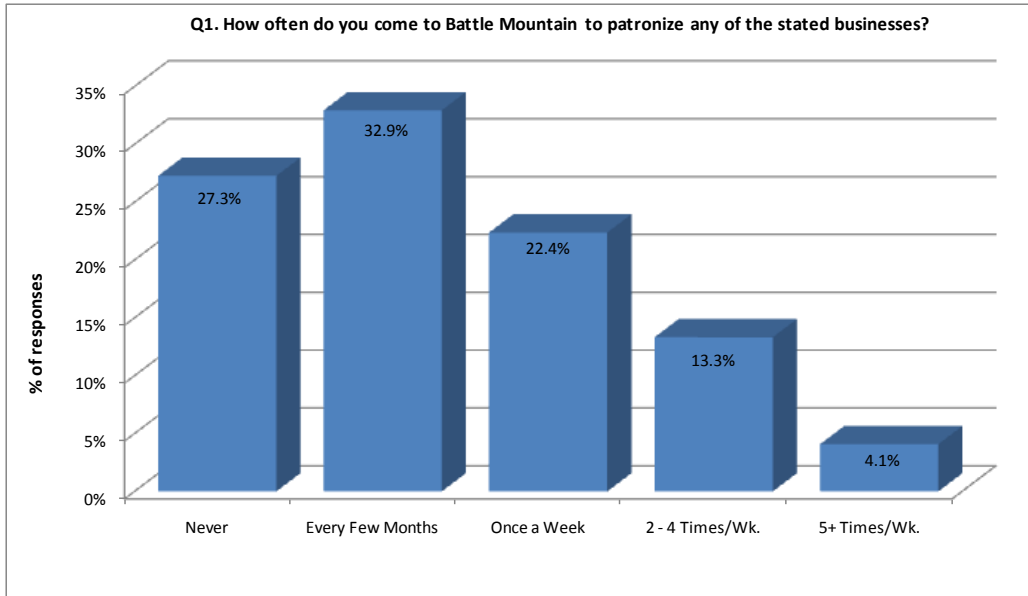
▪ *Current Activity*

How often do you come to Battle Mountain for the following? (Q1)

Participants were asked to choose only one visit frequency for each of ten Battle Mountain business types – frequencies ranged from “Never” to “5+ times/wk”.

In every category except “Shopping, Grocery”, the data reflected that residents were patronizing local businesses once a week or less. “Shopping, Grocery” businesses received the most local business with 2 to 4 visits per week. Across all categories, 60.2 percent of residents reported patronizing all Battle Mountain business types every few months.

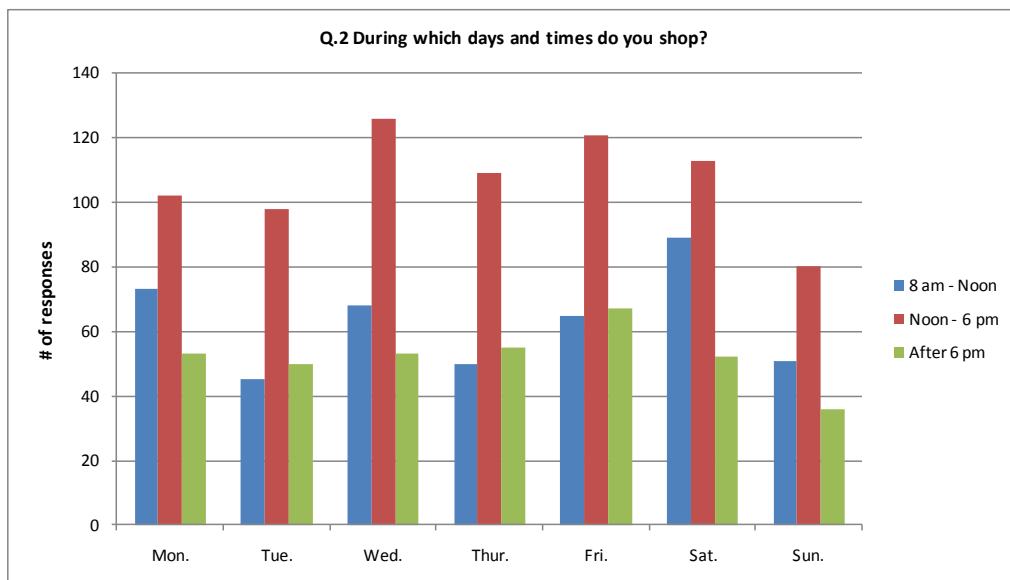


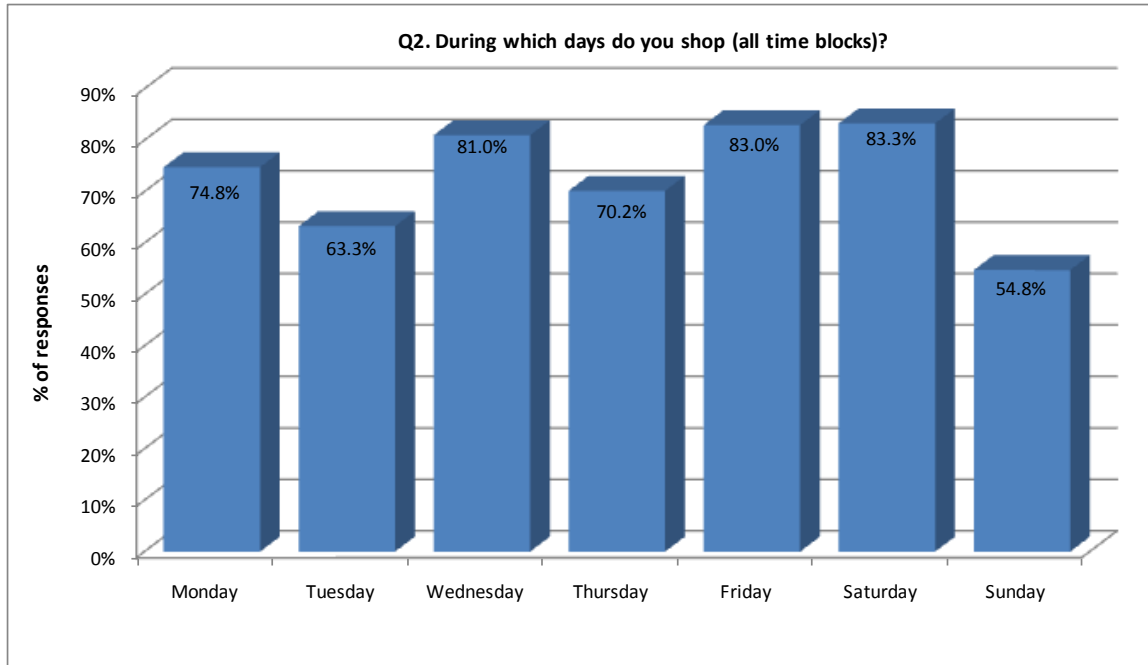


During which of the following days do you shop? (Q2)

Participants were asked to mark all applicable time blocks as to when they shopped. Time blocks were first categorized by day, then by "8 am to noon", "noon to 6 pm", and "after 6 pm". Unselected time blocks were assumed to be "No" responses, resulting in an overall response rate of 100 percent.

The most popular time to shop was reported to be "noon to 6 pm" regardless of the week day. The least popular time to shop was reported to be "after 6 pm", also regardless of day. Respondents indicated Saturday as the most popular day to shop regardless of time block, and Sunday as the least popular day to shop overall.



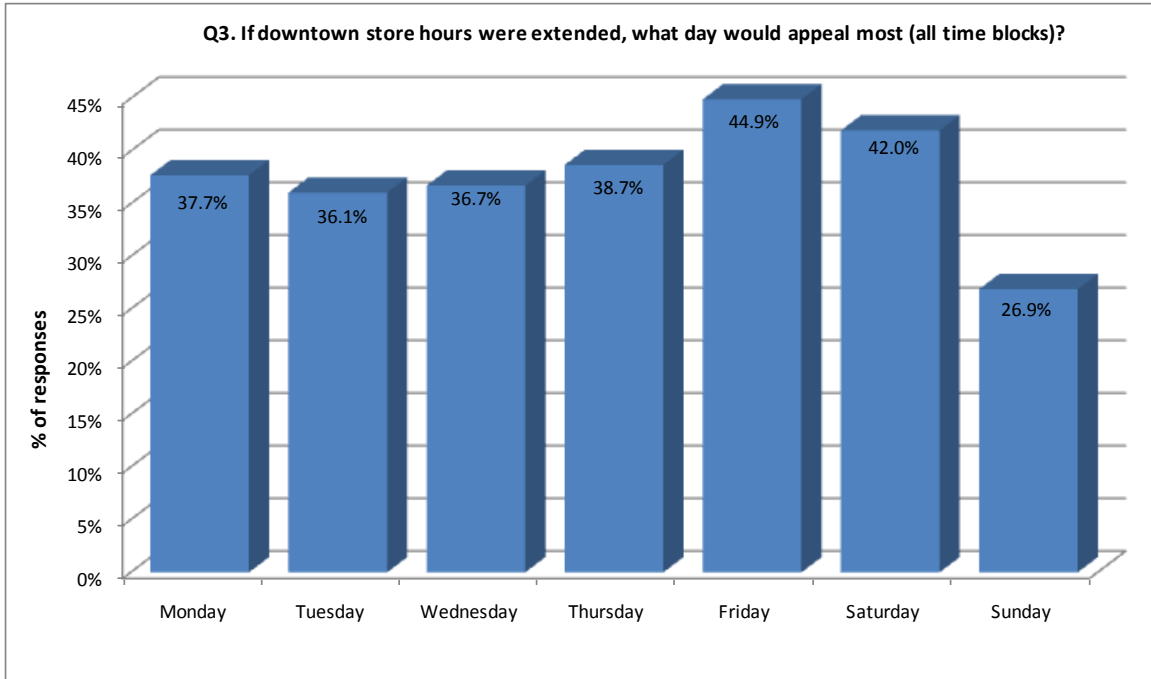
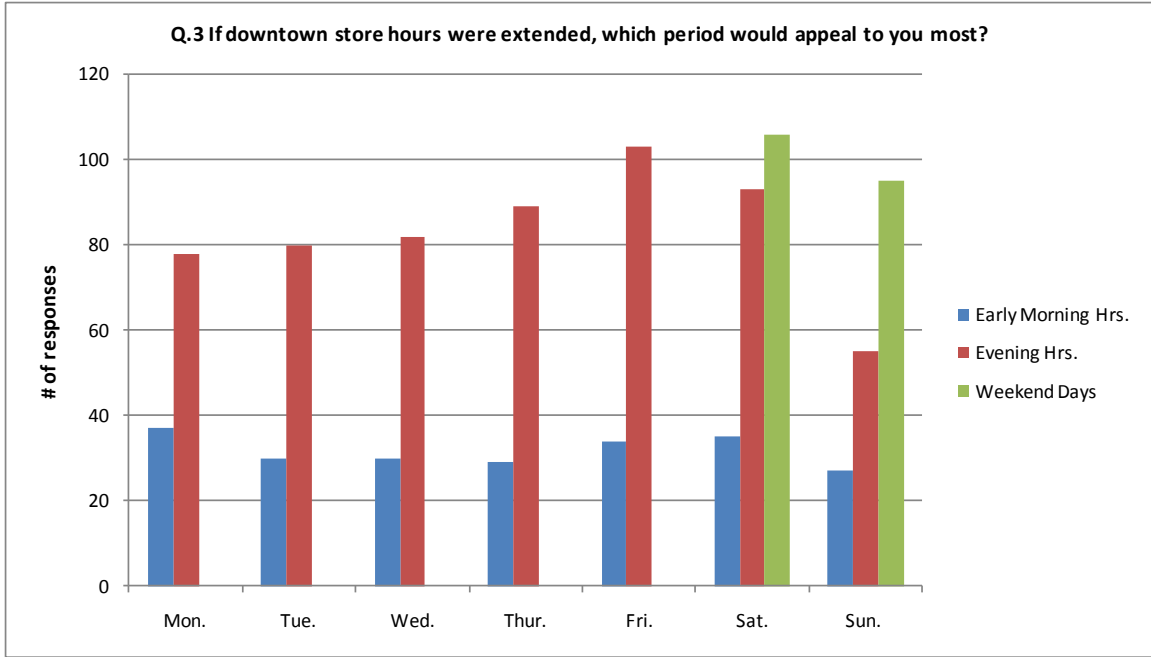


▪ *Ideal Activity*

If downtown store hours were extended, which period would appeal to you most? (Q3)

Participants were asked to mark all applicable time blocks they found most appealing – time blocks were categorized by day then by “early morning hours”, “evening hours”, and “weekend days”. Unselected time blocks were assumed to be “No” responses.

Respondents indicated extended evening hours as desirable, both for weekdays and weekends. Extended Saturday hours was the most desired overall, regardless of time block. Early morning was the least desired time block to extend hours for any day, with Sunday early mornings being the least demanded time block. Extended Friday hours was the most demanded regardless of time block, with Sunday hours having the lowest demand for extended hours.

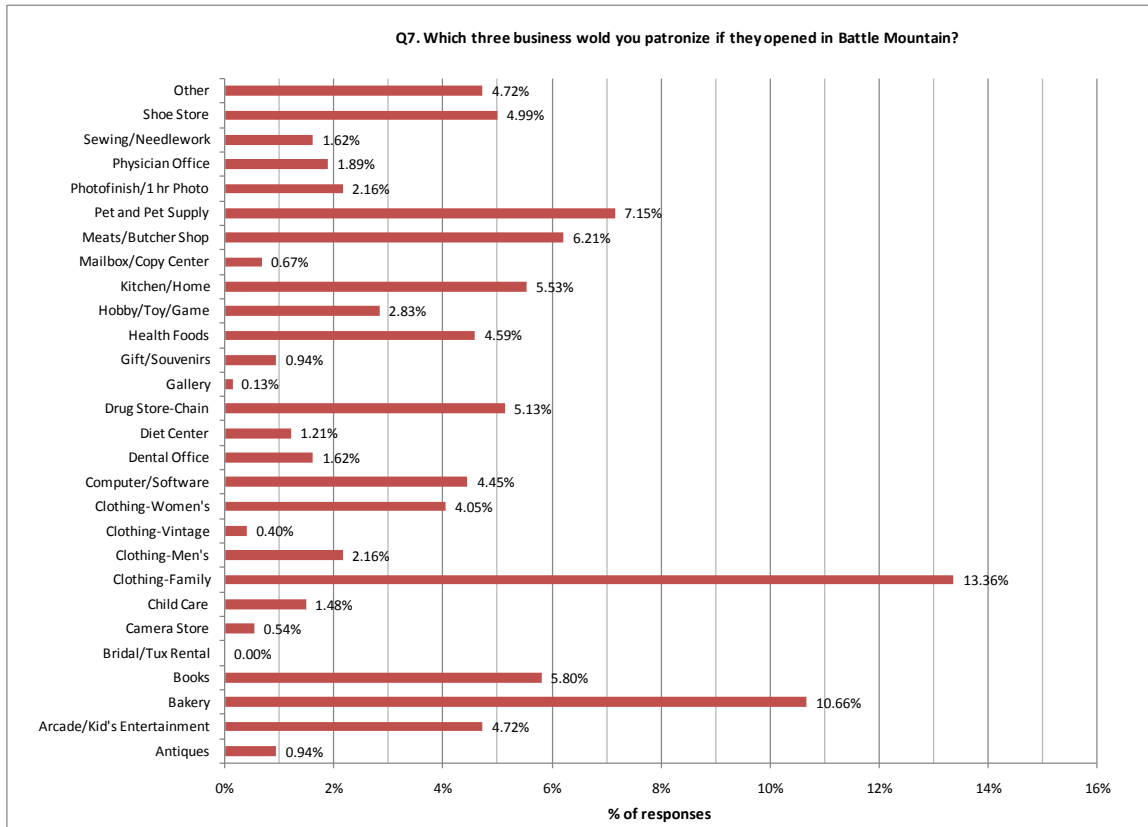


Which THREE businesses would you patronize if they opened in Battle Mountain? (Q7)

Participants were asked to mark up to three business types. Responses were excluded for respondents selecting more than three businesses – 6 percent of all original responses to this question were excluded from analysis below. Two hundred

and sixty-six respondents selected at least one business type – 87.21 percent response rate. A total of 741 responses were gathered for this question.

“Family clothing” was the most popular selection and “Bridal/Tux Rental” was the only business type not selected by any respondent. “Other” business types written in by three or more respondents included grocery (13), movie theater (9), Walmart (7), and restaurant (5).

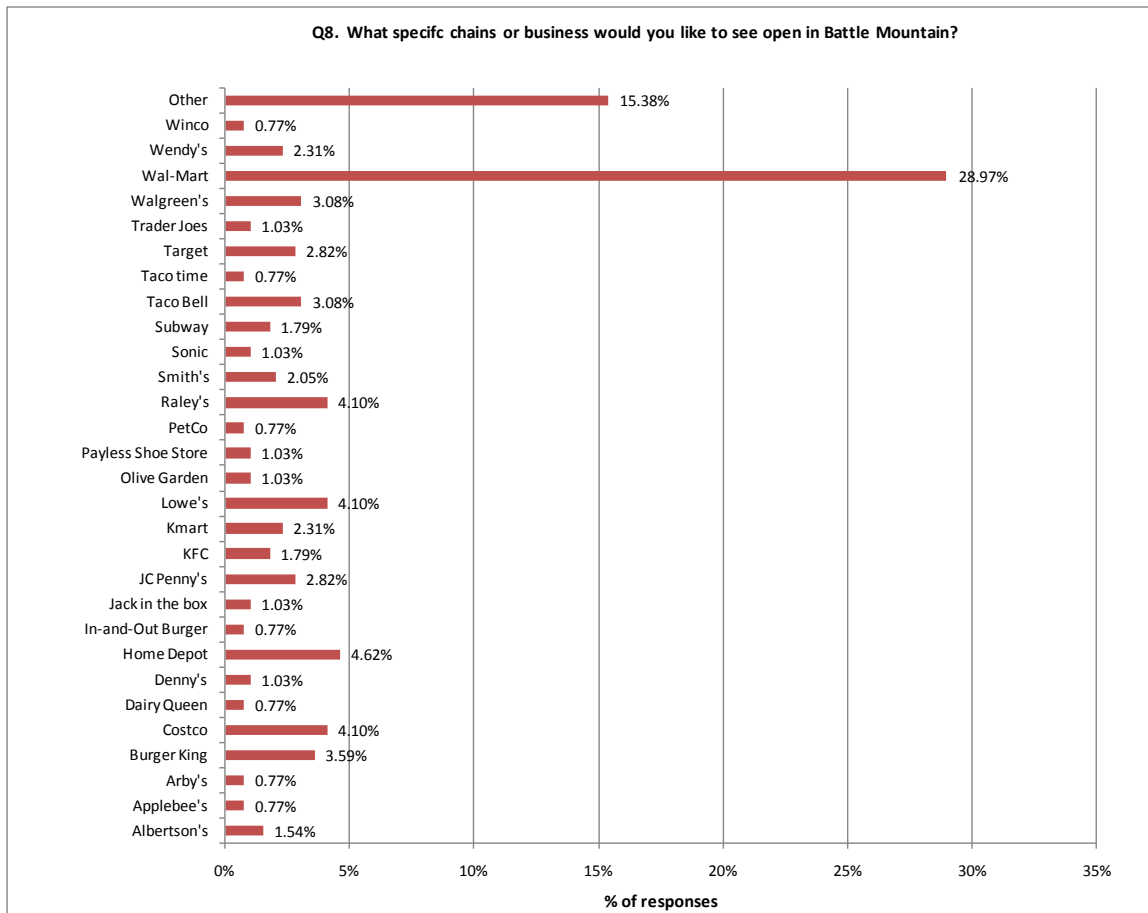


Which TWO specific business names/chains you would like to see come to Battle Mountain? (Q8)

This was an open-ended question. Participants were asked to write in the name of specific businesses they would like to have in Battle Mountain. Responses were excluded for respondents writing in more than two business names (5.98 percent of original responses to this question). In addition, general responses (i.e. “restaurant”, “clothing store”, etc.) were also excluded from the analysis (16.27 percent).

“Walmart” was the most popular business recorded by 28.97 percent of respondents. This outpaced the second most popular business selected, “Home

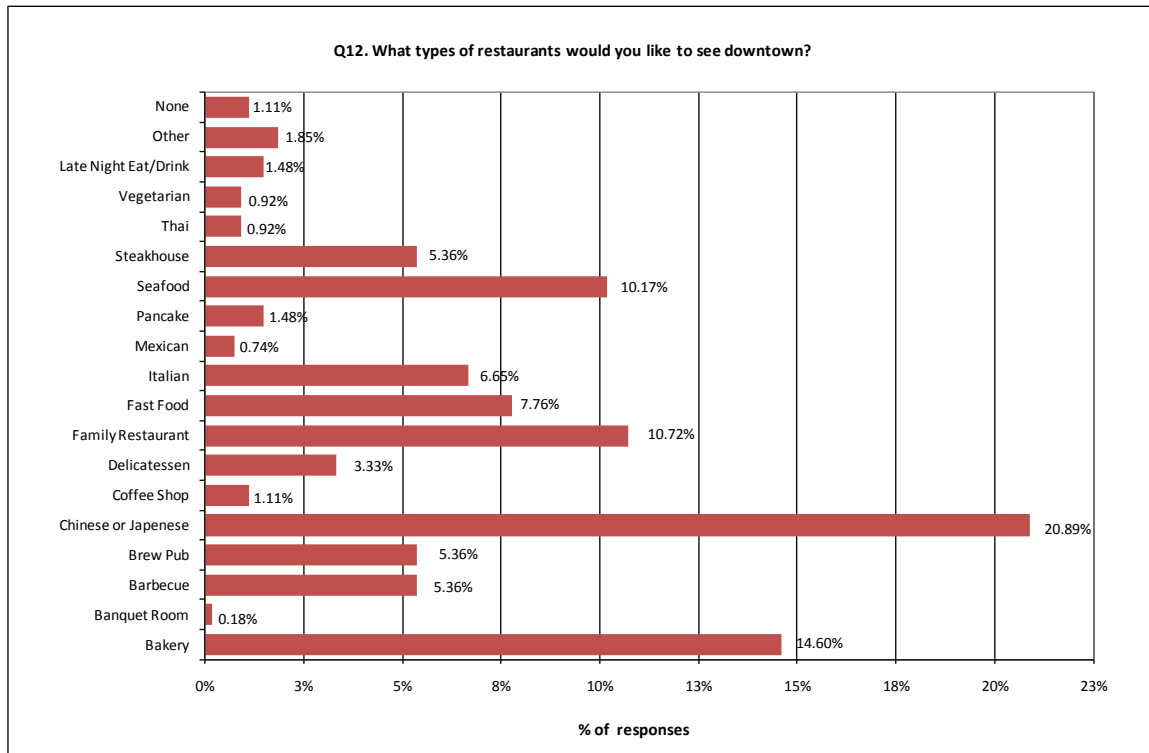
Depot”, by 4.62 percent of respondents. The “Other” category reflects business names written in only once or twice. The top three business types named in “Other” were restaurants (30 percent), discount variety stores (10 percent), and grocery stores (8.33 percent). By contrast, the top three business types among the named businesses explicit in the graph, discount variety stores comprised 45.15 percent; restaurants, 25.15 percent; and grocery stores and home improvement stores, 10.30 percent each.



What TWO types of restaurants would you like to see in Downtown Battle Mountain? (Q12)

Participants were asked to mark up to two restaurant types. Responses were excluded for respondents selecting more than two restaurant types – 3.7 percent of all original responses to this question were excluded from analysis below. Two hundred and eighty-one respondents selected at least one restaurant type, a 92.1 percent response rate. A total of 541 responses were gathered for this question.

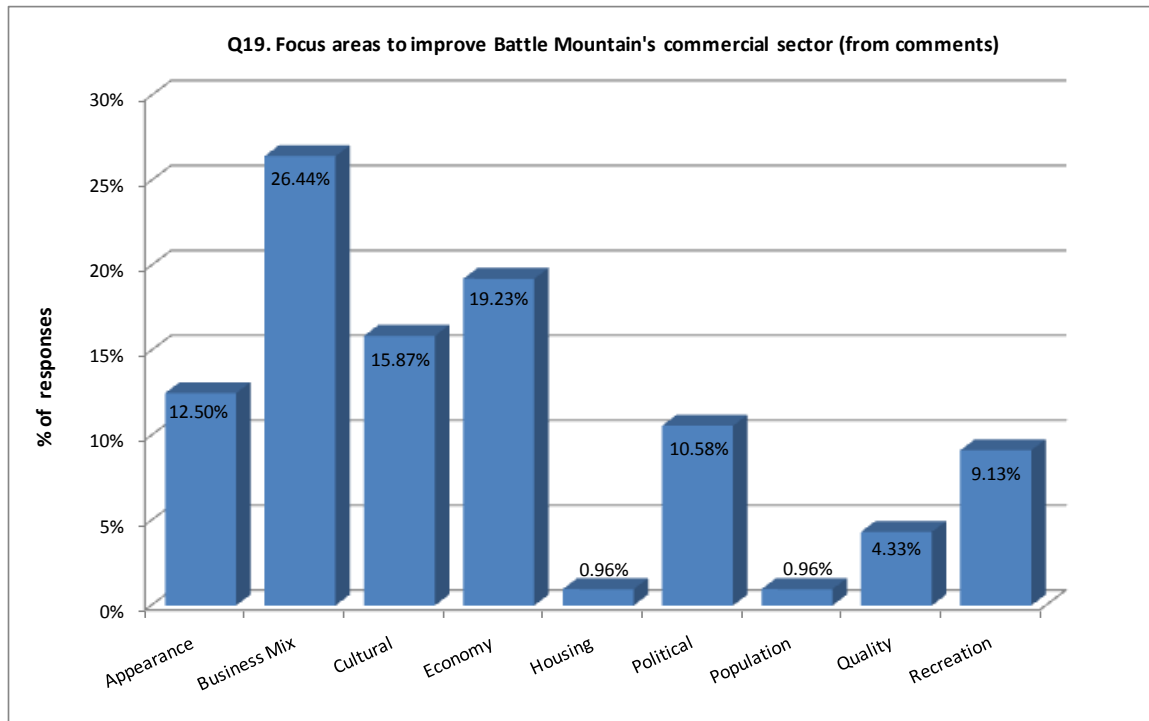
“Chinese or Japanese” was the most popular category and was selected by 20.89 percent of respondents. “Bakery” was the next most favorite at 14.6 percent, and “Family Restaurant” at 10.72 percent. The least desired restaurant type was “Banquet Room” selected by 0.18 percent of respondents. The “Other” category did not report any restaurant type more than once. “Other” restaurant types reported included Vietnamese, sports bar, and buffet.



Please provide any additional comments you feel would help us improve the Battle Mountain commercial sector. (Q19)

This was an open-ended question. Participants were provided four blank lines to write in suggestions for improving Battle Mountain’s commercial sector. No responses were excluded because the question format did not contain response qualifiers. In order to report the findings simplistically, responses were categorized into nine categories such as appearance, economy, quality, etc. These descriptors are intended to capture the nature of each statement. An individual statement may be categorized in more than one category. For example, a statement such as “The restaurants here aren’t very good and their prices are too high.” were classified in both “economy” and “quality”. At least 137 respondents answered this question, a 44.92 percent response rate.

“Business Mix” was the most commonly cited suggestion, offered by 26.44 percent of respondents. Following were “Economy” at 19.23 percent, then “Cultural” at 15.87 percent. “Population” and “Housing” were the least cited categories at 0.96 percent each.

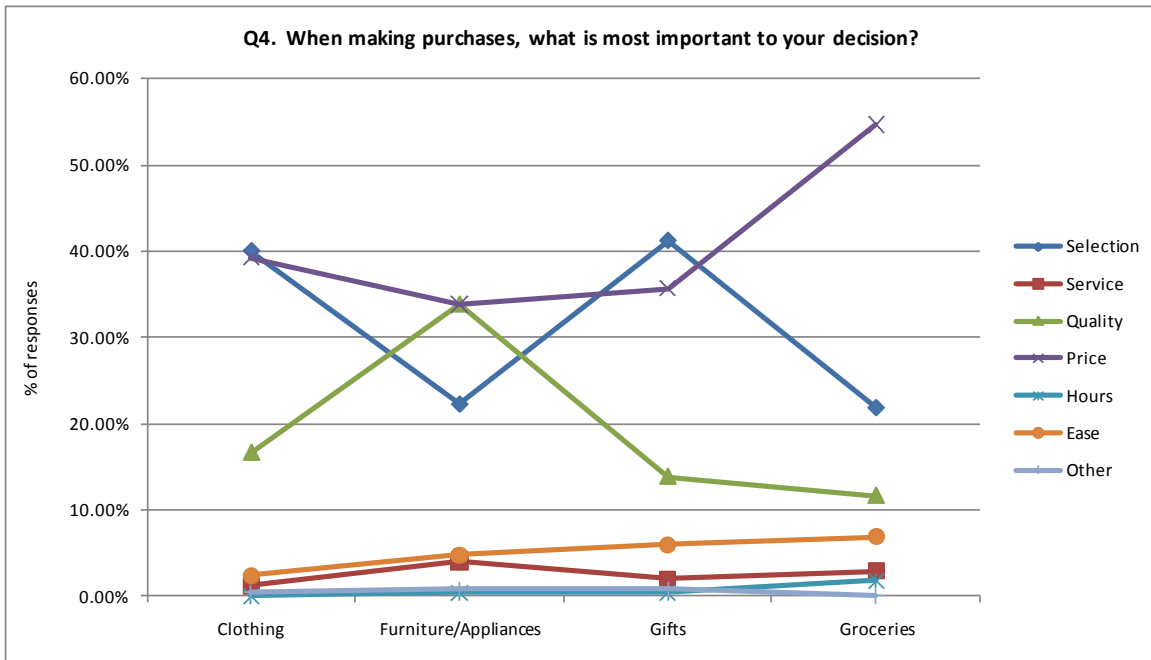
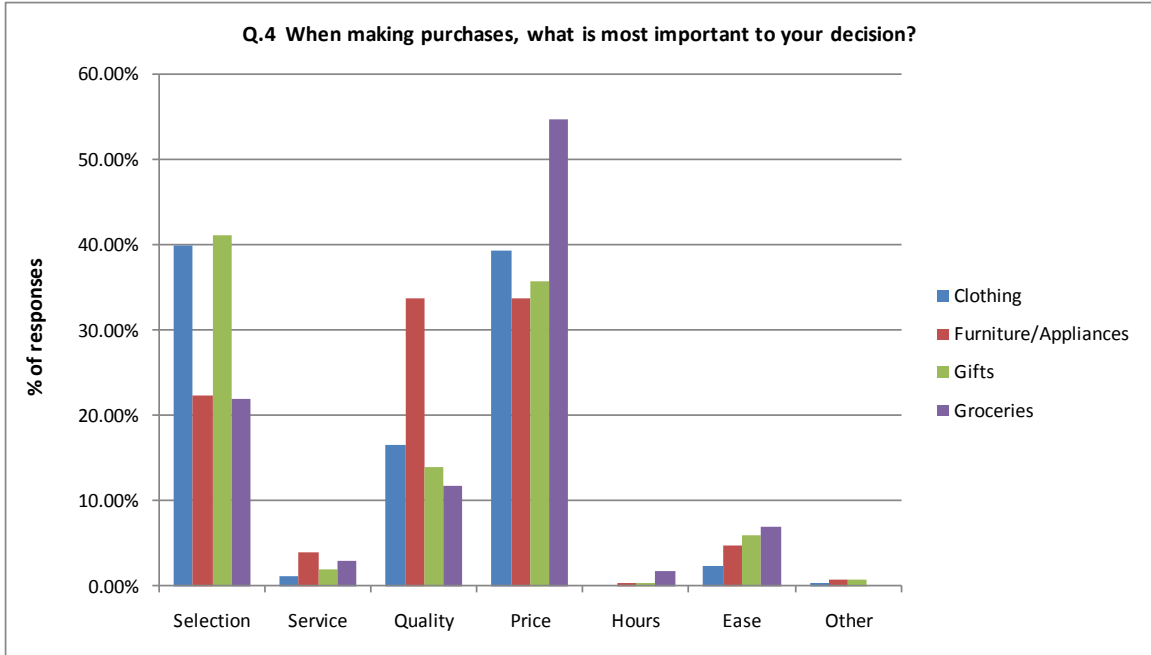


General Shopping Patterns: Where and Why

When making purchases, what is most important to your decision? (Q4)

Participants were asked to choose only one of seven reasons (e.g. service, quality) for influencing each of four types of good purchases. Responses were excluded for respondents selecting more than two purchase reasons for a single good. Two hundred and seventy-four respondents addressed at least one of the good categories (“Groceries”) – a response rate of 89.8 percent.

“Price” was reported to be the most important factor across most good purchases with the exception of “Gifts”. However, “Price” was only selected 5.6 percent less often than “Selection” even for the “Gift” purchases. “Price” had the strongest influence on “Groceries” (53.5 percent), as it outpaced the next most important factor, “Selection”, by 32.84 percent – the largest gap between the first and second selected purchase factors. “Other” reasons given by at least two respondents included “made in America”, “buy local”, and “buy online”.



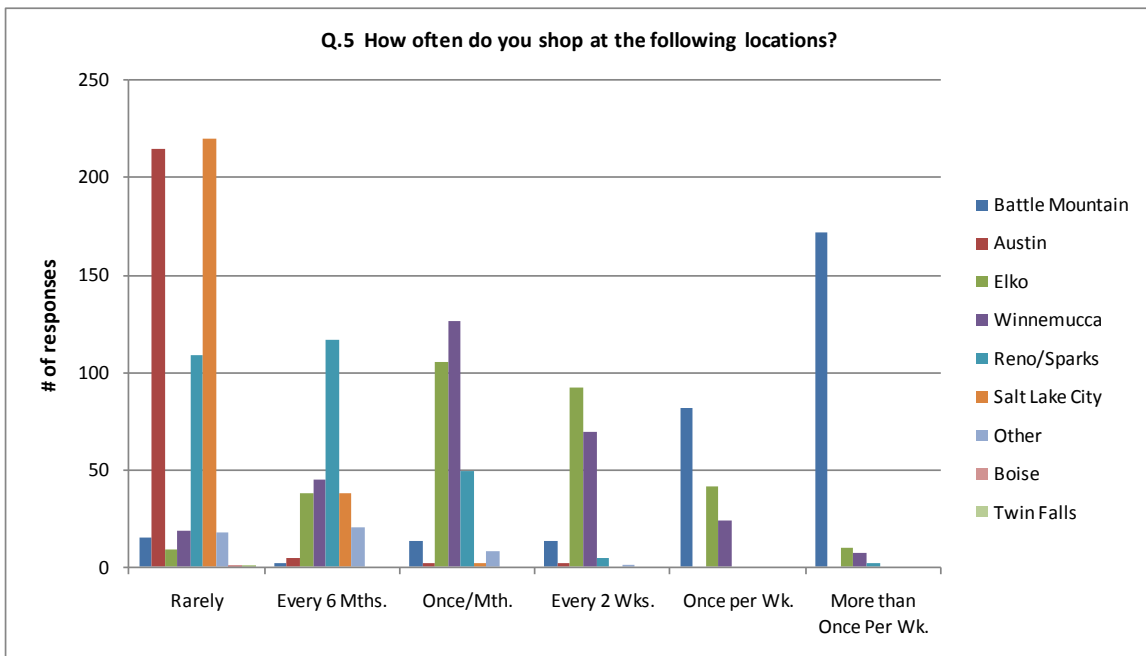
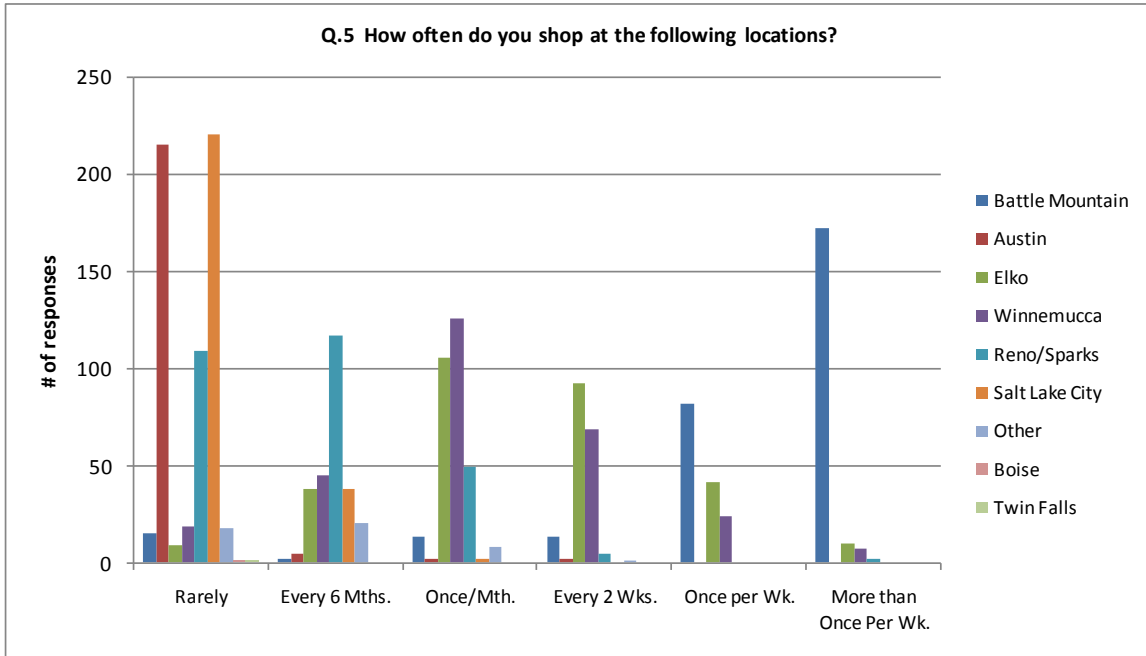
Indicate how often you shop at the following locations. (Q5)

Participants were asked to choose only one shopping frequency for each of seven locations.

Ninety percent of those shopping more than once per week were shopping in Battle Mountain, which dominated all other locations given this shopping frequency. Elko was reported as the next most popular location for the same frequency at 5.24

percent. It should be noted that Elko was reported by 286 respondents given any frequency while Battle Mountain was only reported by 282 respondents. Austin and Salt Lake City were the least popular shopping destinations.

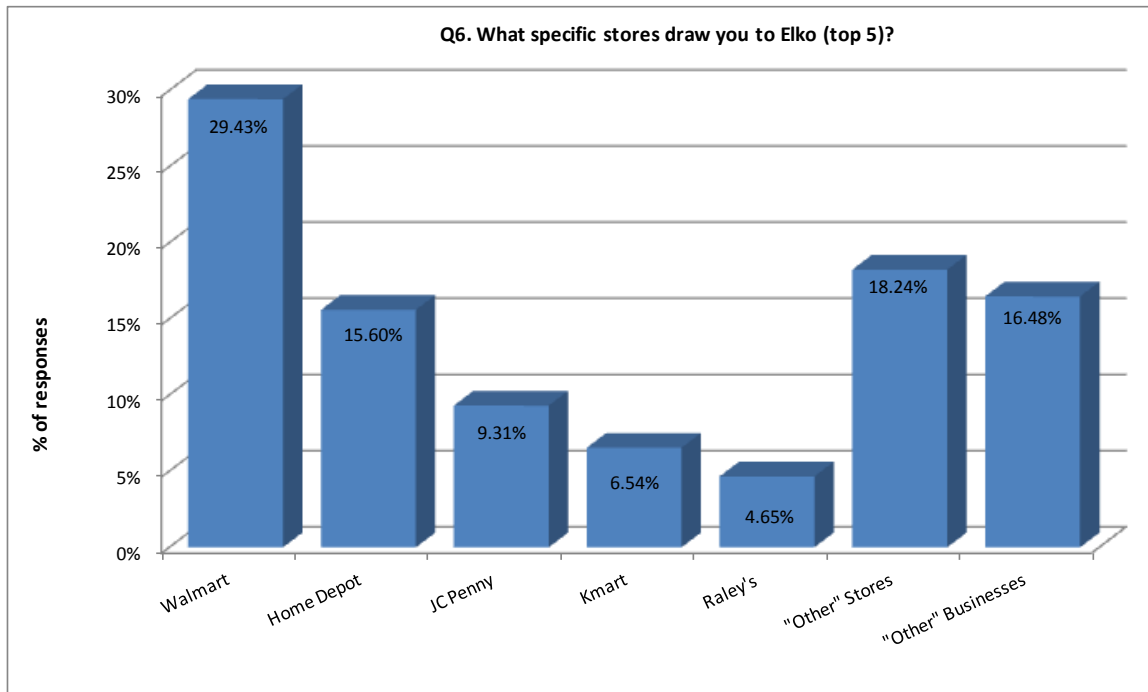
“Other” shopping locations given by at least two respondents included “Twin Falls, Idaho” (56 percent of “Other” total) and “Boise, Idaho” (22 percent of “Other” total).

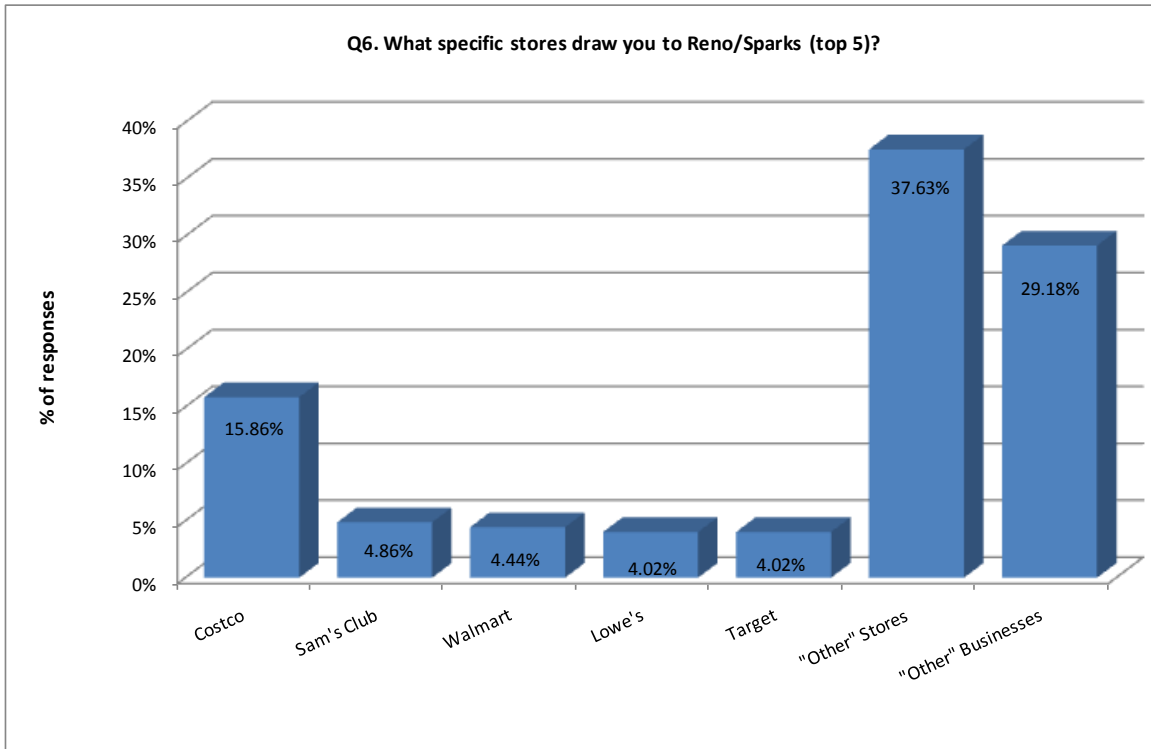
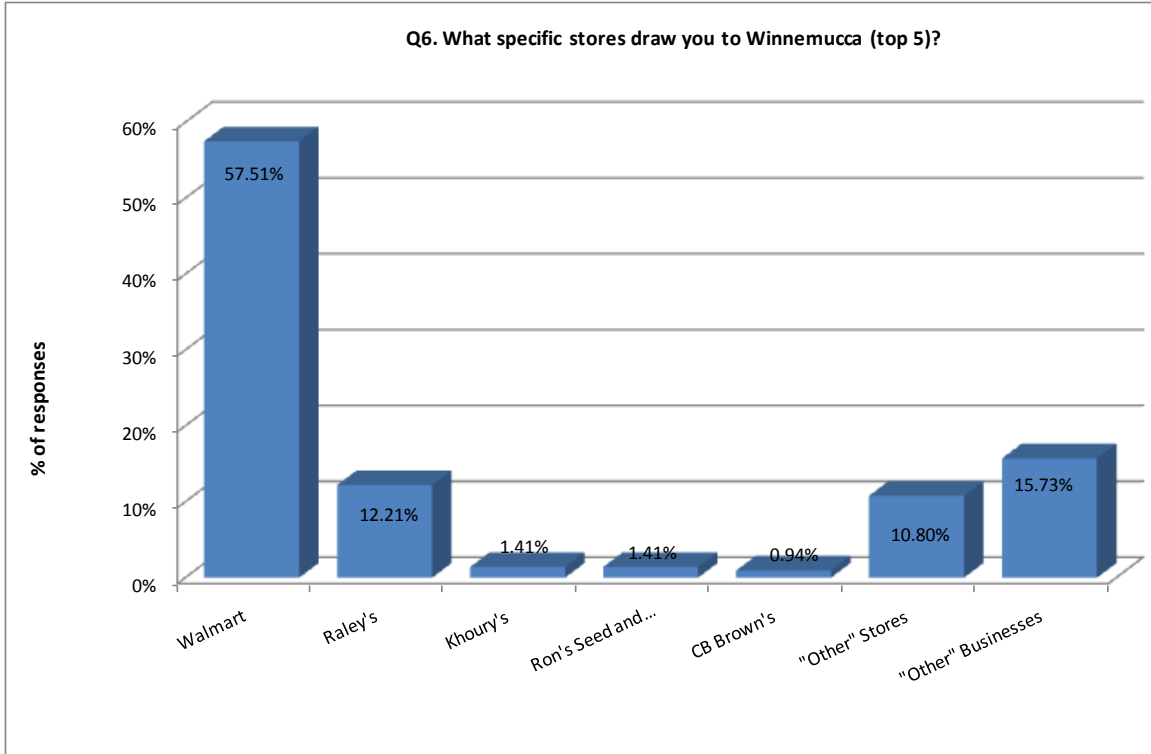


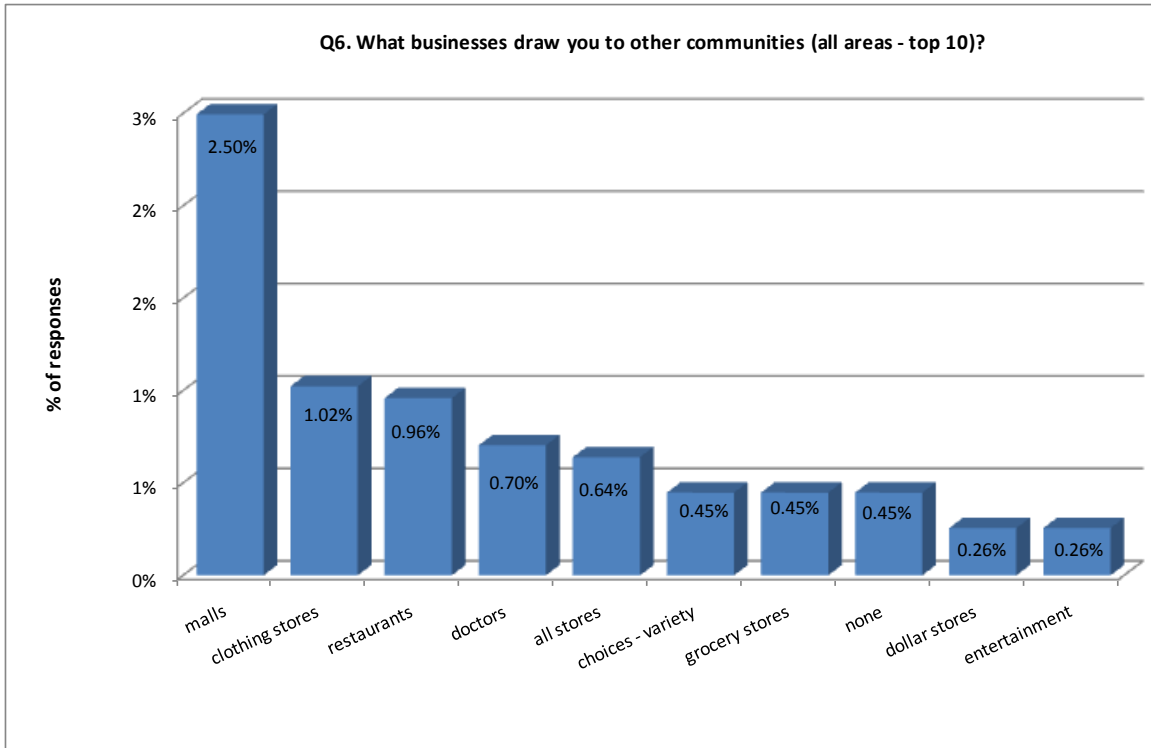
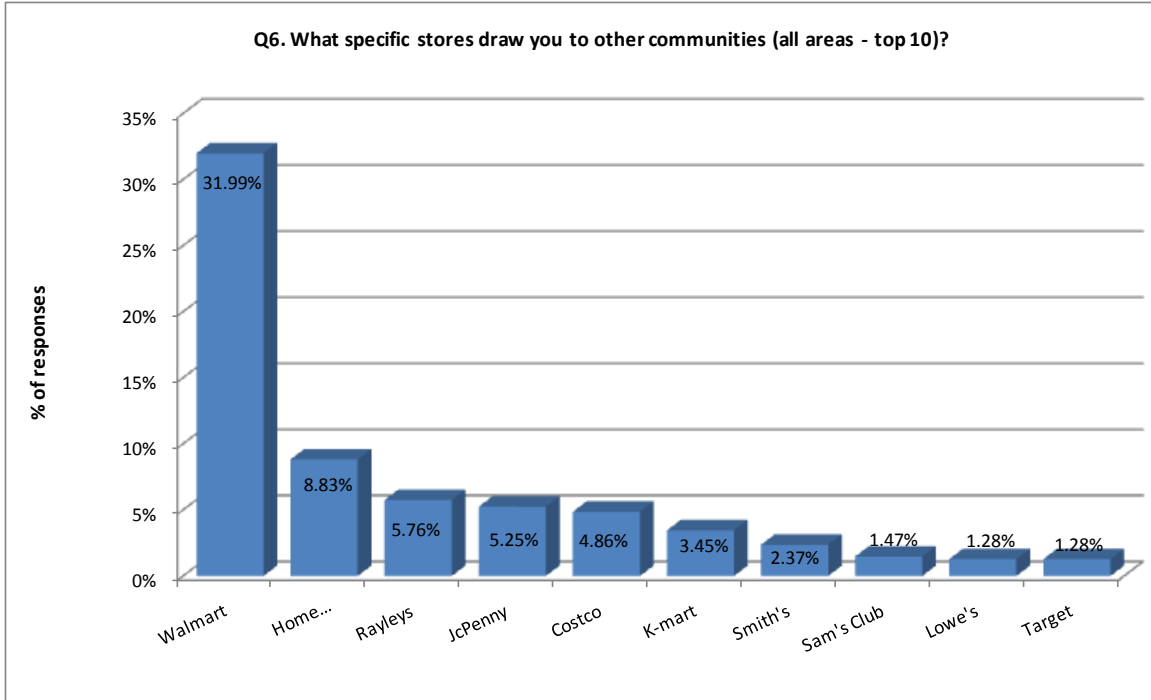
Which specific store(s) draw you to other communities? (Q6)

This was an open-ended question. Participants were asked to write in the name of specific businesses that they travel to patronize in Elko, Winnemucca, and/or Reno/Sparks. Elko received the most responses with 285, a 93.44 percent response rate. The response rates for Winnemucca and Reno/Sparks were 87.87 percent and 67.87 percent respectively.

Respondents wrote in the greatest number of Elko stores and businesses – 795 comprised of 48 specifically named stores and 42 general business types. However, respondents named the most diverse businesses in the Reno/Sparks area with 58 specific stores and 33 general businesses. For both Winnemucca and Elko, Walmart was the primary draw of Battle Mountain customers. Big box stores are a draw for rural customers such as those in Battle Mountain.

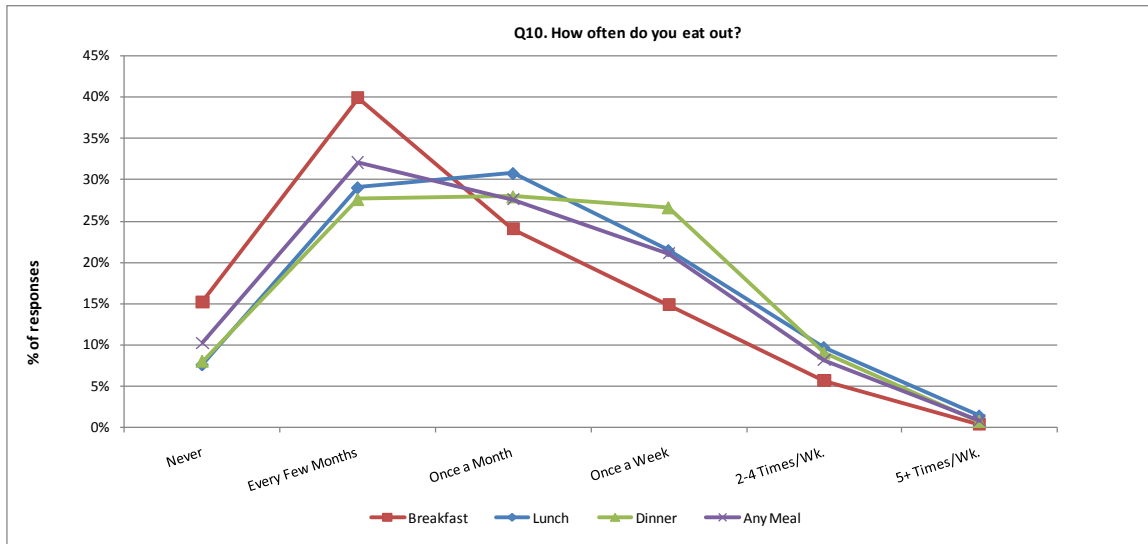






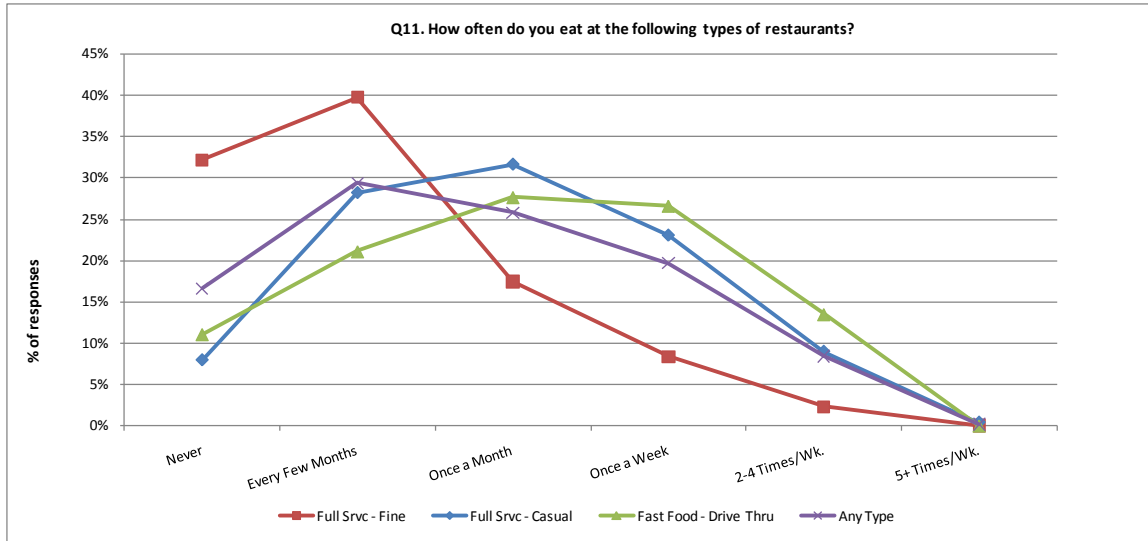
How often do you eat out? (Q10)

Participants were asked to choose only one dining-out frequency for each daily meal – frequencies ranged from “Never” to “5 or more times/week”. In general, respondents did not appear to regularly dine out for any meal – 32.11 percent reported eating out “Every Few Months” and 27.64 percent reported eating out “Once a Month”. “Dinner” was selected most frequently for dining out at any frequency – 276 respondents chose a frequency other than “Never”. Breakfast was selected the least – 240 respondents chose a frequency other than “Never”.



How often do you eat at the following types of restaurants? (Q11)

Participants were asked to choose only one frequency for each restaurant type – “Full Service-Fine Dining”, “Full Service-Casual Dining”, and “Fast Food/Drive Through”. In general, respondents did not dine out regularly for any meal – 32.11 percent reported eating out “Every Few Months” and 27.64 percent reported eating out “Once a Month”. “Full Service-Casual” and “Fast Food/Drive Through” were selected most often at any frequency – 268 and 257 respectively. “Full Service-Fine Dining” was selected far less with 179 reporting frequencies other than “Never”.



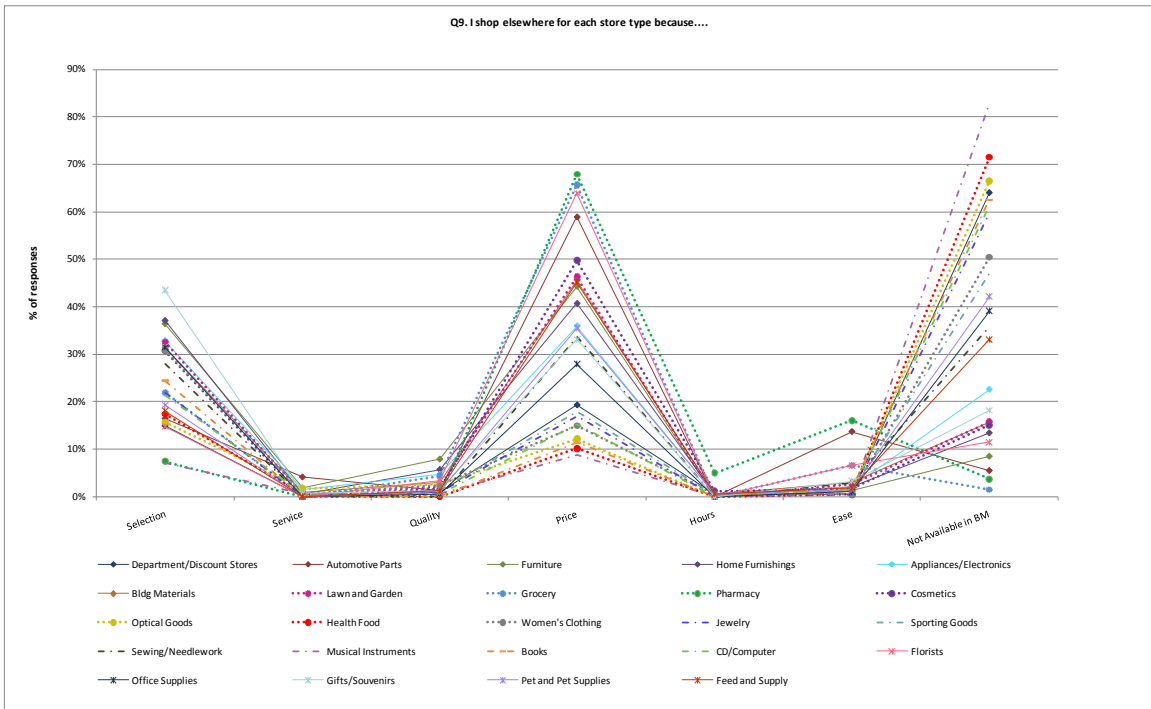
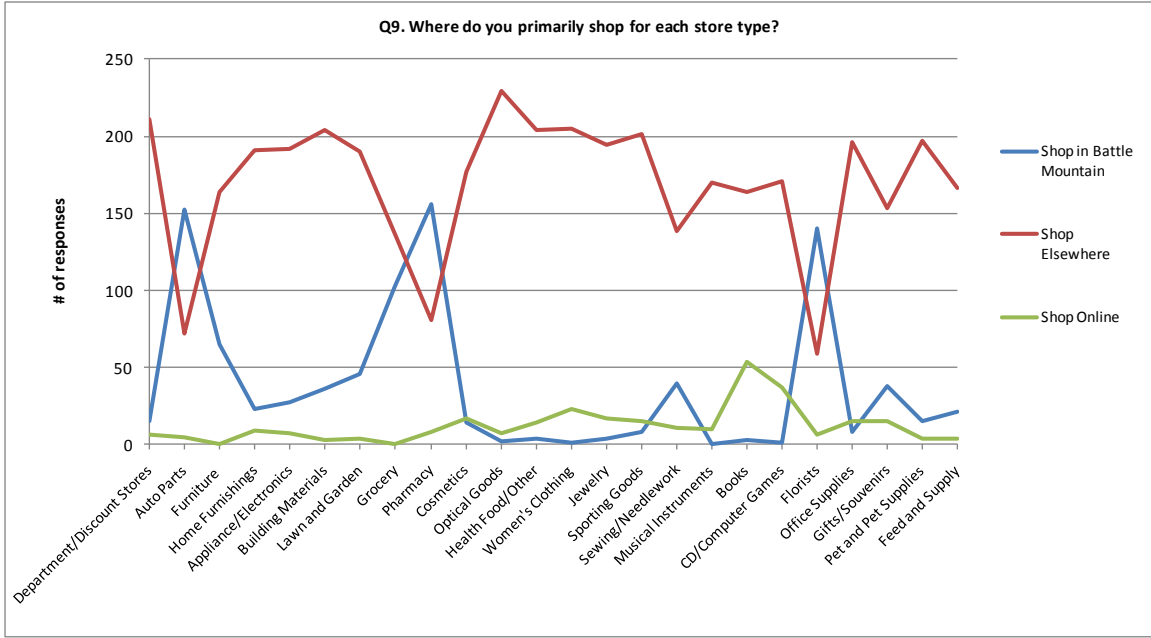
Preferences of Shopping Location Across Types of Goods

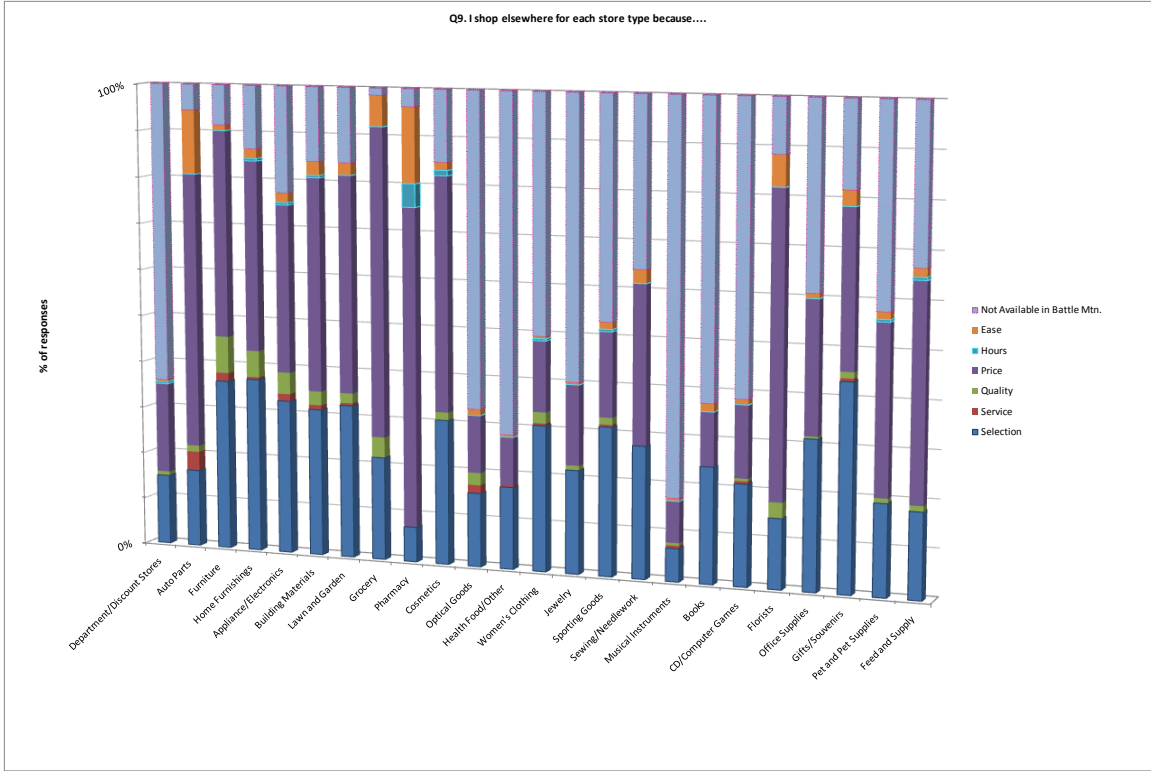
If you shop the following types of stores, please indicate if you primarily shop in the Battle Mountain area. If not, indicate why you shop elsewhere? (Q9)

This was a three part question. Participants were first asked to select whether or not they shopped in Battle Mountain at 24 specific business types. Next, if they did not shop at a specific type of business in Battle Mountain, they were asked to choose only one of seven reasons (e.g. service, quality) explaining why they shopped elsewhere. Responses were excluded if respondents selected both shopping in Battle Mountain and a reason they shopped elsewhere. "Automotive Parts" had the greatest number of exclusions (26 percent) for the first two sections. "Department/Discount Stores" had the highest response rate for the first two sections at 80 percent. The average response rate for these combined sections was 70.06 percent

Finally, participants were asked to state whether or not they shopped online. Unselected time blocks were assumed to be "No" responses, resulting in an overall response rate of 100 percent.

Only "Auto Parts", "Pharmacy", and "Florists" were Battle Mountain businesses preferred over out-of-town businesses (35.68 percent, 31.65 percent, and 40.78 percent respectively). "Selection", "Price", and "Not Available in Battle Mountain" were the primary reasons for purchasing goods outside of Battle Mountain. "Quality", "Service", and "Hours" had very little influence over shopping location for any store types. Of these three low-utility qualities, 8 percent of respondents reported that they shopped outside of Battle Mountain to purchase "Quality" "Furniture".



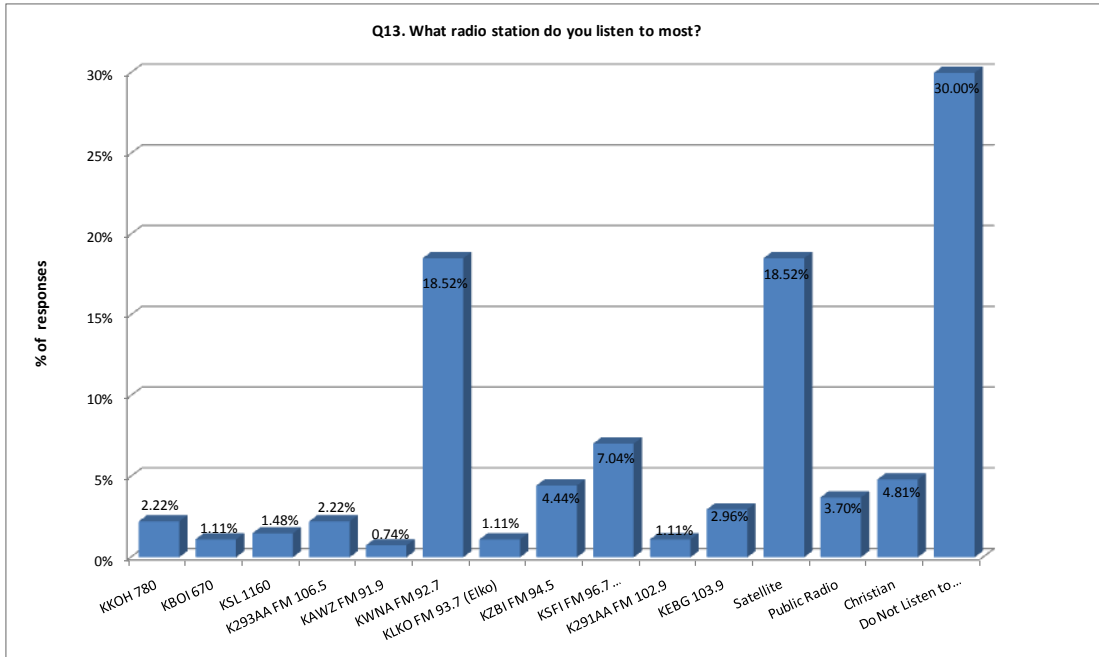


Preference Demographics: Media Outlets, Activities, Community Ideals

What radio station do you listen to most? (Q13)

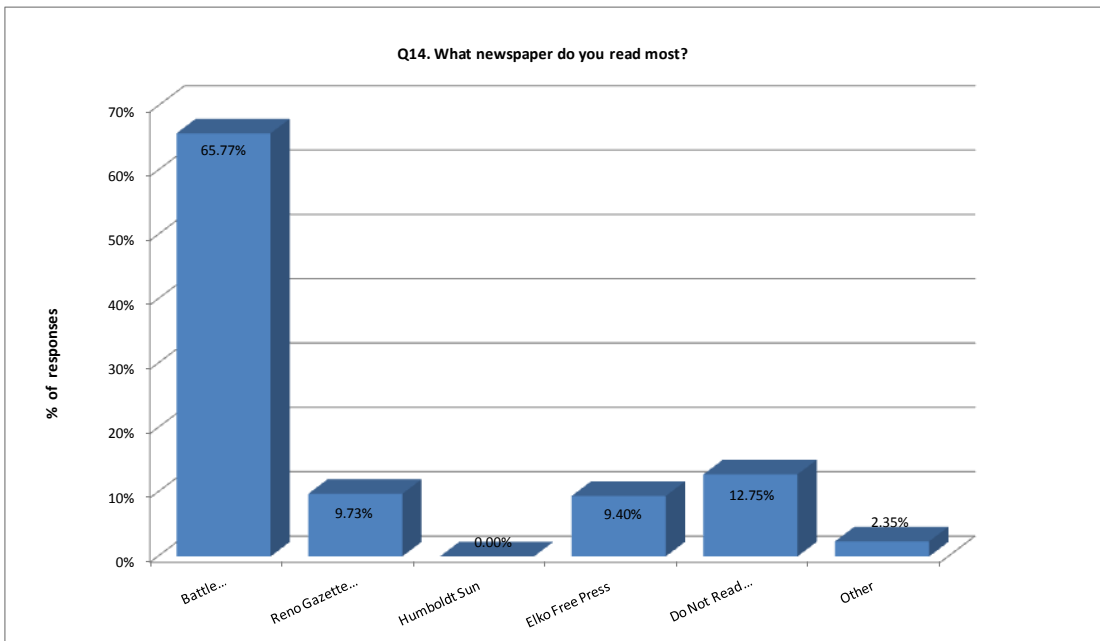
Participants were asked to choose a single radio station they listened to most often. Four radio station call numbers were provided along with a "Do Not Listen to Radio" choice and an "Other" category with an option to write in stations not listed. Nearly half (48.57 percent) of the respondents provided an "Other" response. Responses listed more than once were incorporated into the graph below. Only 10 "Other" responses were not classifiable into one of the categories below and were not duplicated. These 10 are not represented in the chart, so that the percentages are based on n=270.

Thirty percent of respondents reported that they do not listen to the radio – a response rate higher than any of the radio stations. Satellite radio was preferred equally to the most popular local station, KWNA FM 92.7.



What newspaper do you read to most? (Q14)

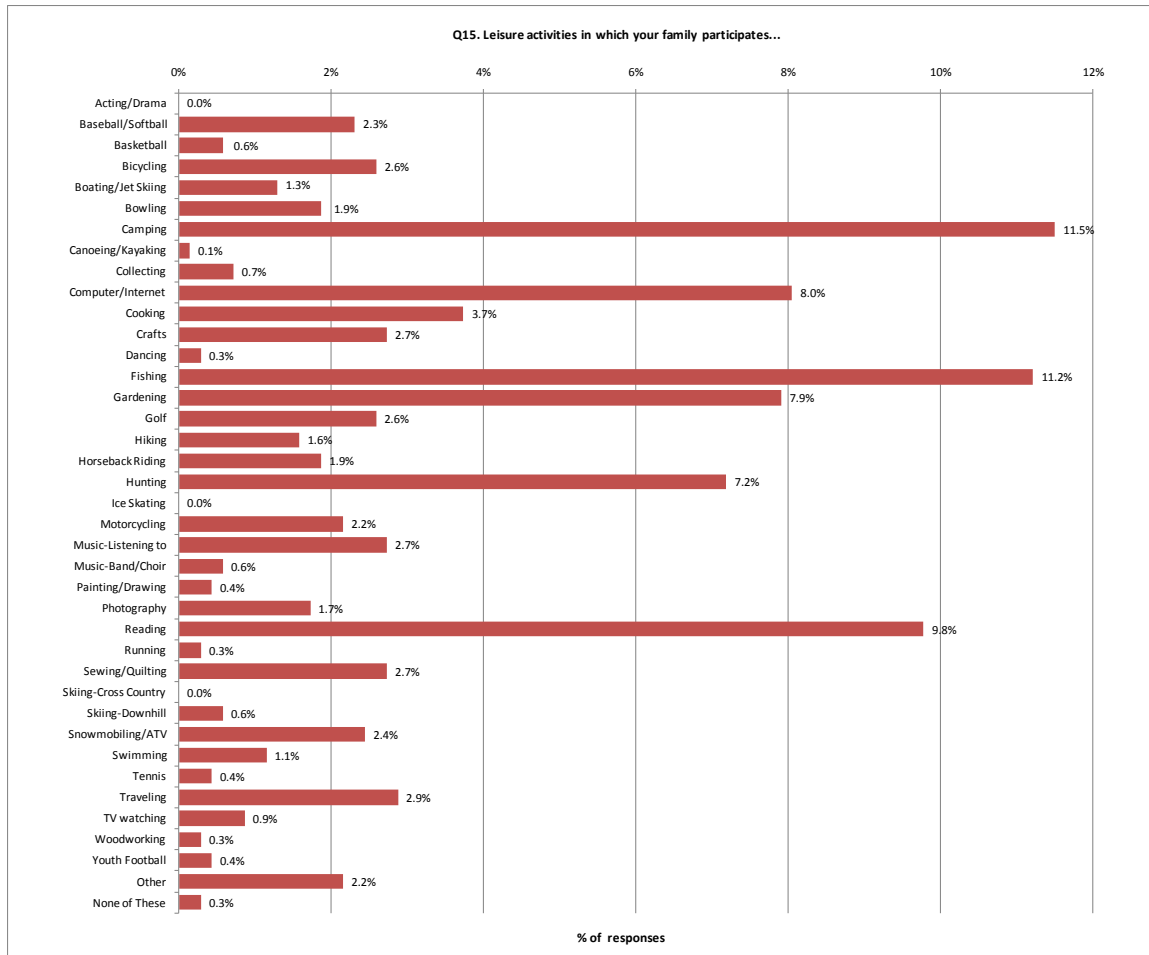
Participants were asked to choose a single newspaper they read most often. Four newspaper names were provided along with a “Do Not Read a Newspaper” choice and an “Other” category with an option to write in newspapers not listed. The *Battle Mountain Bugle* was the overwhelming favorite at 65.77 percent. Unlike the radio question above, only 12.75 percent of respondents reported that they did not read a newspaper.



In which THREE leisure activities does your household participate? (Q15)

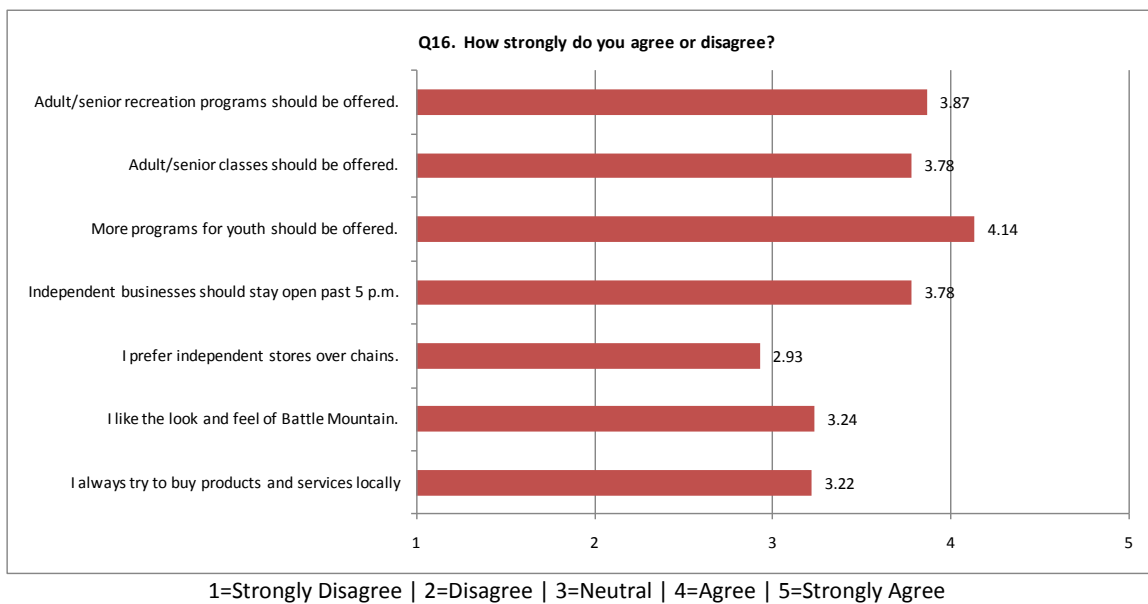
Participants were asked to mark up to three leisure activities. Responses were excluded for respondents selecting more than three activities – 17.07 percent of all original responses were excluded from the analysis below. Two hundred and forty-three respondents selected at least one business type, a 79.67 percent response rate. A total of 696 responses were gathered for this question.

Interest in activities was wide spread, with the most popular category (camping) reported at 11.5 percent. The least popular activities were not selected at all and were “Acting/Drama”, “Ice Skating”, and “Skiing – Cross Country”. “TV Watching” and “Youth Football” were not included in the original survey but are reflected in the graph below because they were written in for the “Other” category by several respondents.



How strongly do you agree/disagree with the following statements? (Q16)

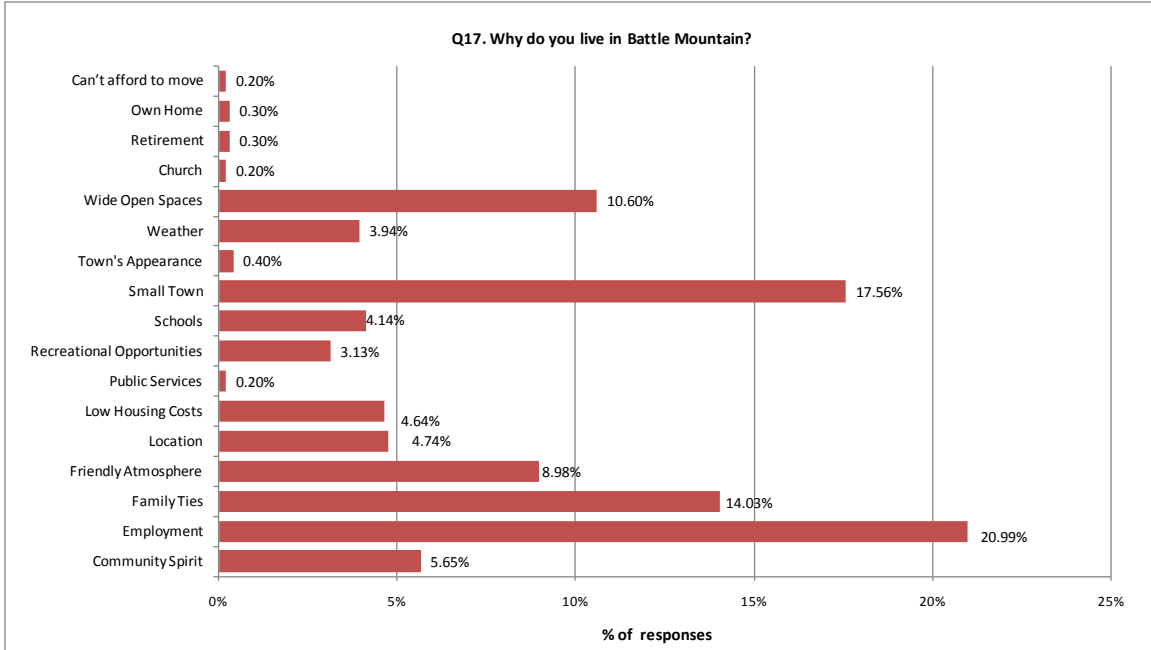
Participants were asked to respond to a series of general statements about the Battle Mountain community and local businesses. They were instructed to select one of five opinions ranging from “Strongly Agree” (data value = 5) to “Strongly Disagree” (data value = 1) for each statement. The figures reflected in the graph represent the average response for that particular statement. On average, respondents slightly disagreed with “I prefer independent stores over chains.” In addition, they most strongly agreed with “More programs for youth should be offered.”



Why do you live in Battle Mountain? (Q17)

Participants were asked to mark all reasons why they live in Battle Mountain. A write-in choice for “Other” was included for reasons not listed in the original survey. Thirty-nine “Other” answers were written in and were incorporated into the graph below. “Church”, “Retirement”, “Own Home”, and “Can’t afford to move” are additions based on the “Other” write in reasons.

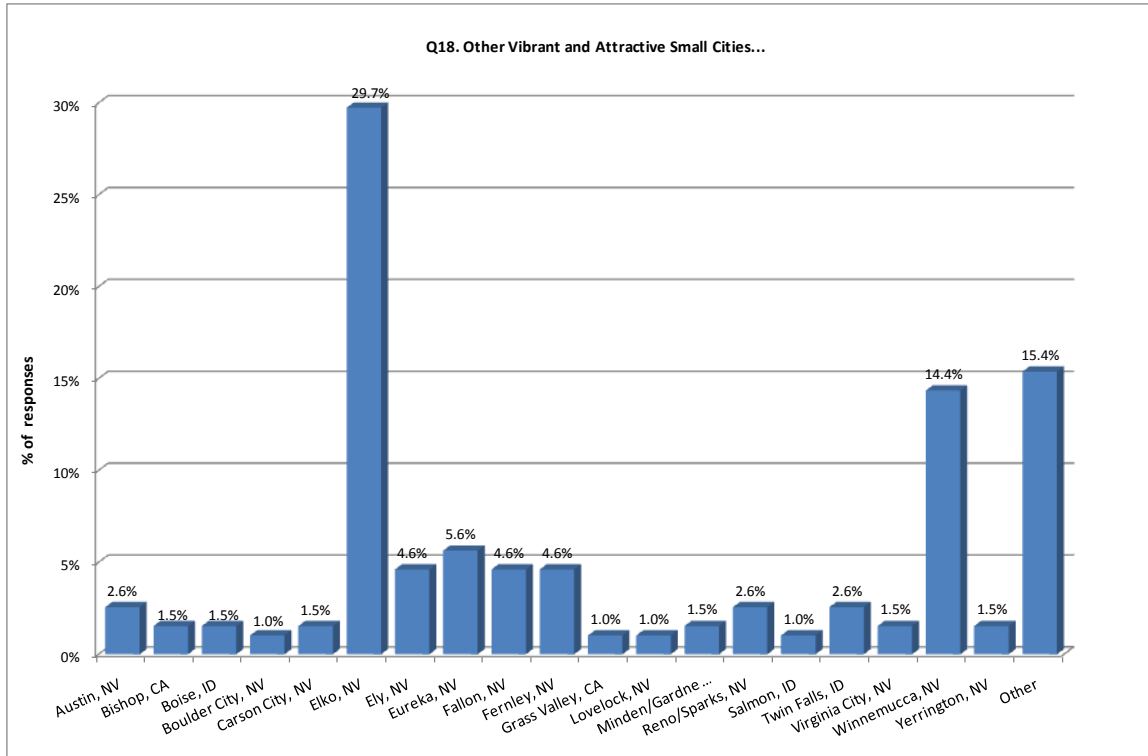
“Employment” was the most commonly selected reason with 20.33 percent followed closely by “Small Town” at 17.01 percent. “Public Services” at 0.20 percent and “Town’s Appearance” at 0.40 percent were the least common reasons provided explicitly in the original survey.



Name another small city that you feel has a vibrant and attractive downtown. (Q18)

This was an open-ended question and respondents were asked to write in the name of any other town they felt met the question's criteria. One hundred and ninety-five respondents provided at least one city or town – a response rate of 63.93 percent. The graph below represents locations that were mentioned at least twice. Locations named only once are grouped into "Other".

Elko was stated most often at 29.7 percent, with the second preference being Winnemucca at 14.4 percent. Of particular interest, even though respondents could have written in any city or town in the world, 76.92 percent chose towns or cities in Nevada.



General Demographics: ZIP code, Household Counts, Age, Gender, Education, Profession, Income

Please tell us a little about yourself.

This section asked participants to describe both their personal and household demographics. ZIP code, number of household residents in total, and number of children in household were open-ended questions. All other questions provided checkbox categories from which to choose. Participants were instructed to choose only one category for each checkbox question (where relevant). Response rates and demographic responses are provided with each graph.

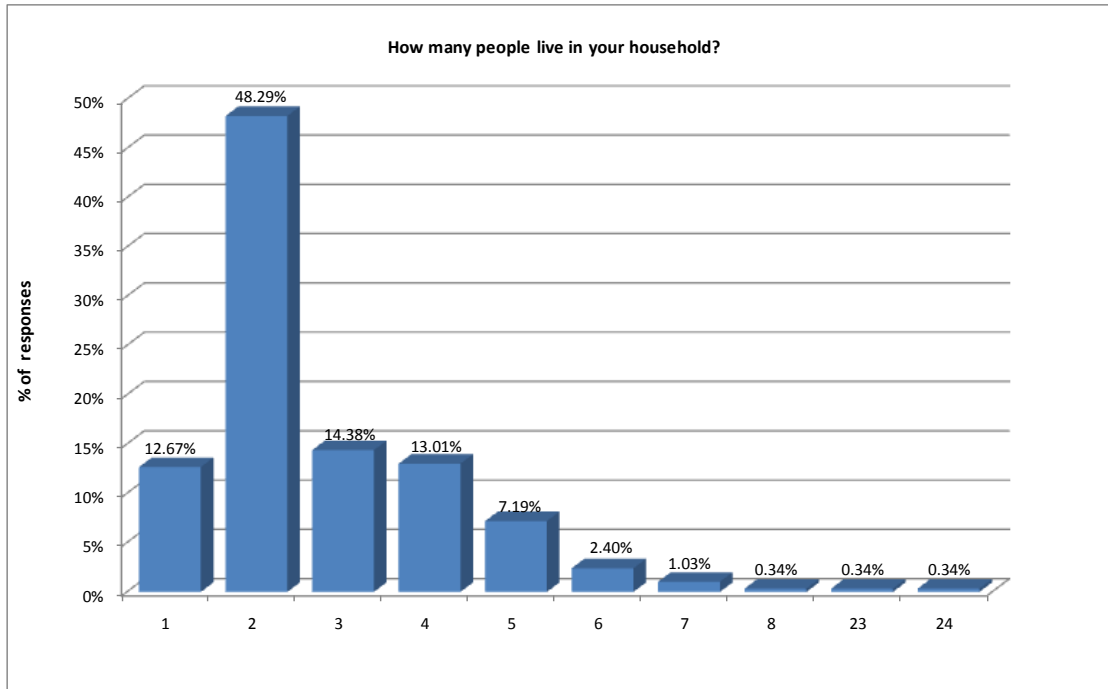
What is your home ZIP code?

Response rate of 97.7 percent.

Zip	Freq.	Percent
89820 - Battle Mountain	295	98.99%
97630 - Lakeview, OR	1	0.34%
89821 - Moapa Valley	1	0.34%
89020 - Amargosa Valley	1	0.34%
Total	298	100.00%

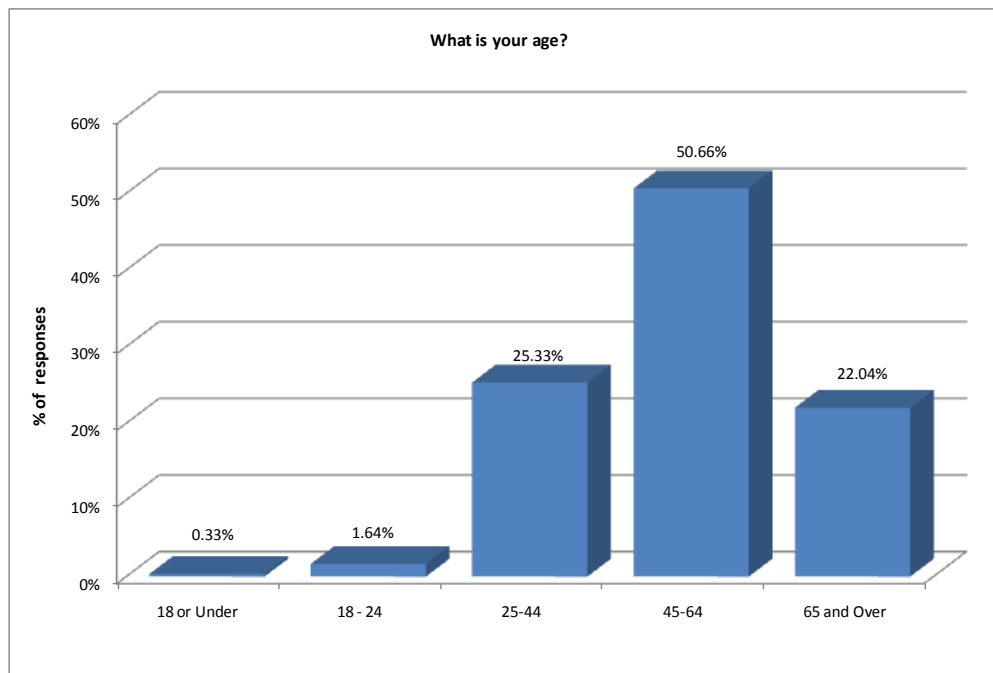
How many live in your household?

Response rate of 95.74 percent. Household counts of 23 and 24 were confirmed against paper survey.



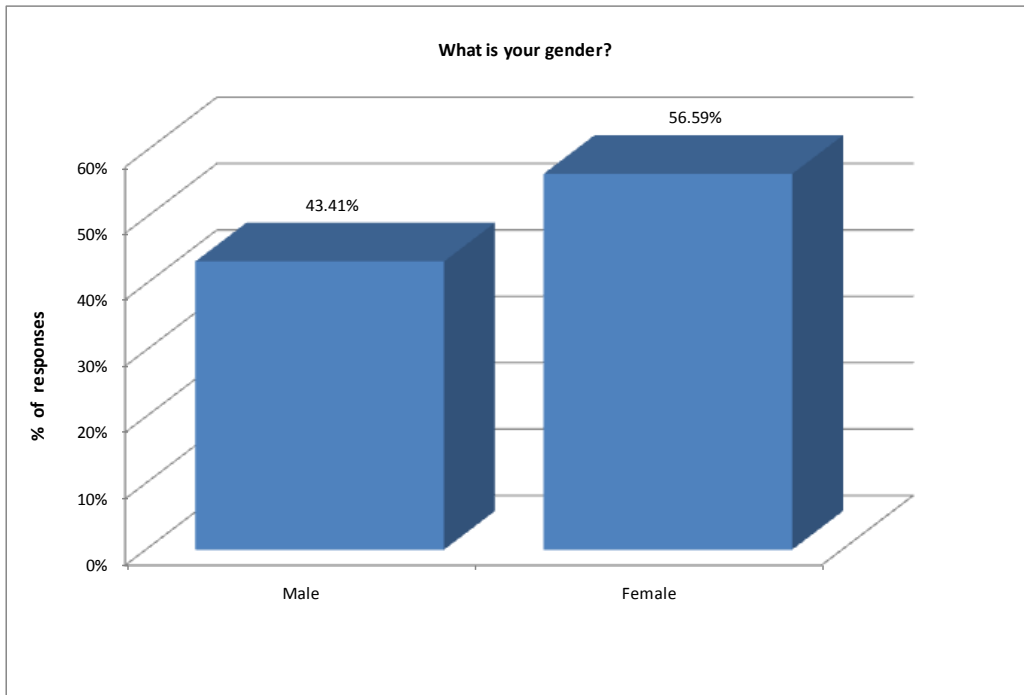
What is your age?

Response rate of 99.67 percent.



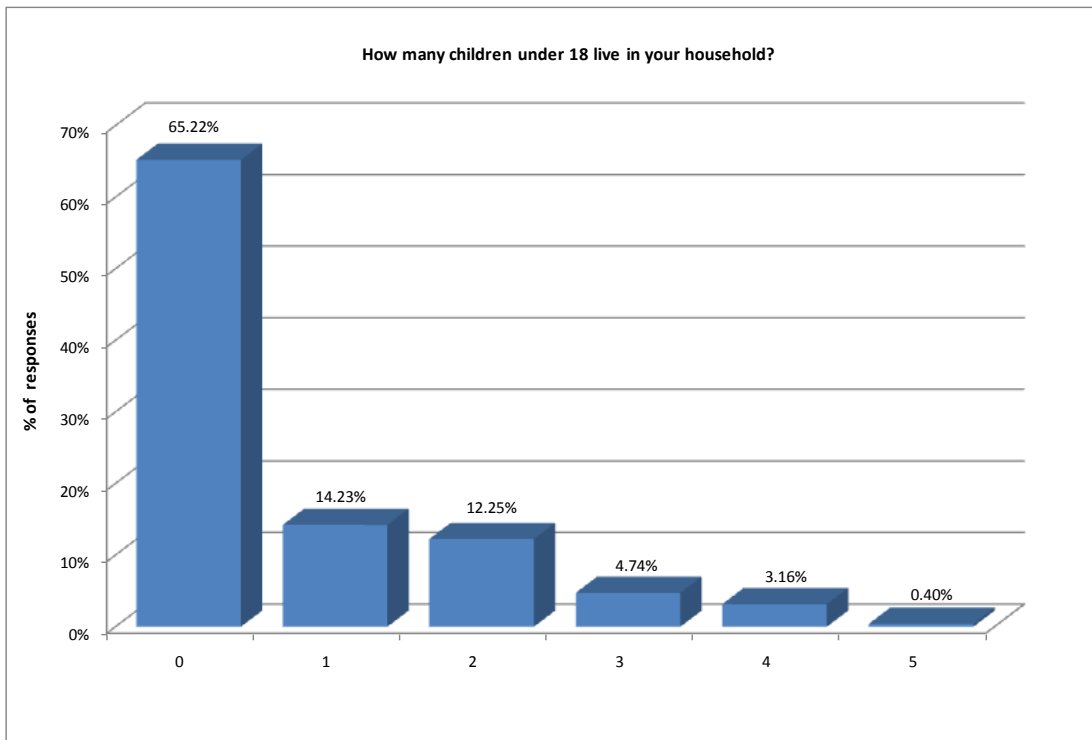
What is your gender?

Response rate of 84.59 percent.



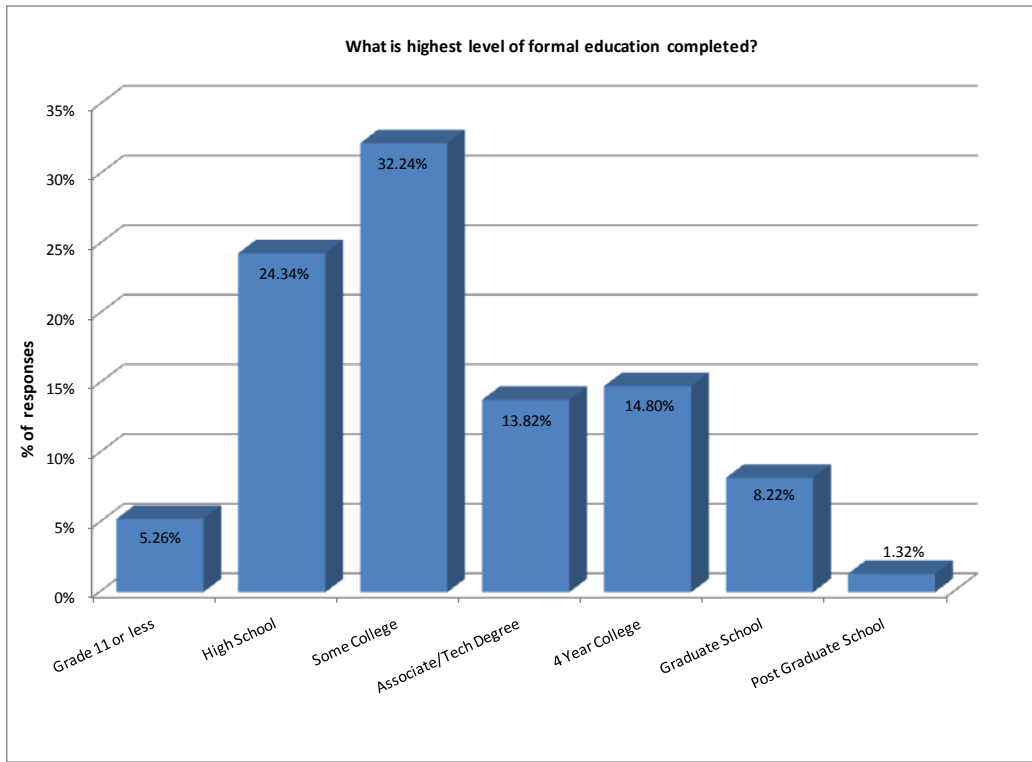
How many children under 18 live in your household?

Response rate of 82.95 percent.



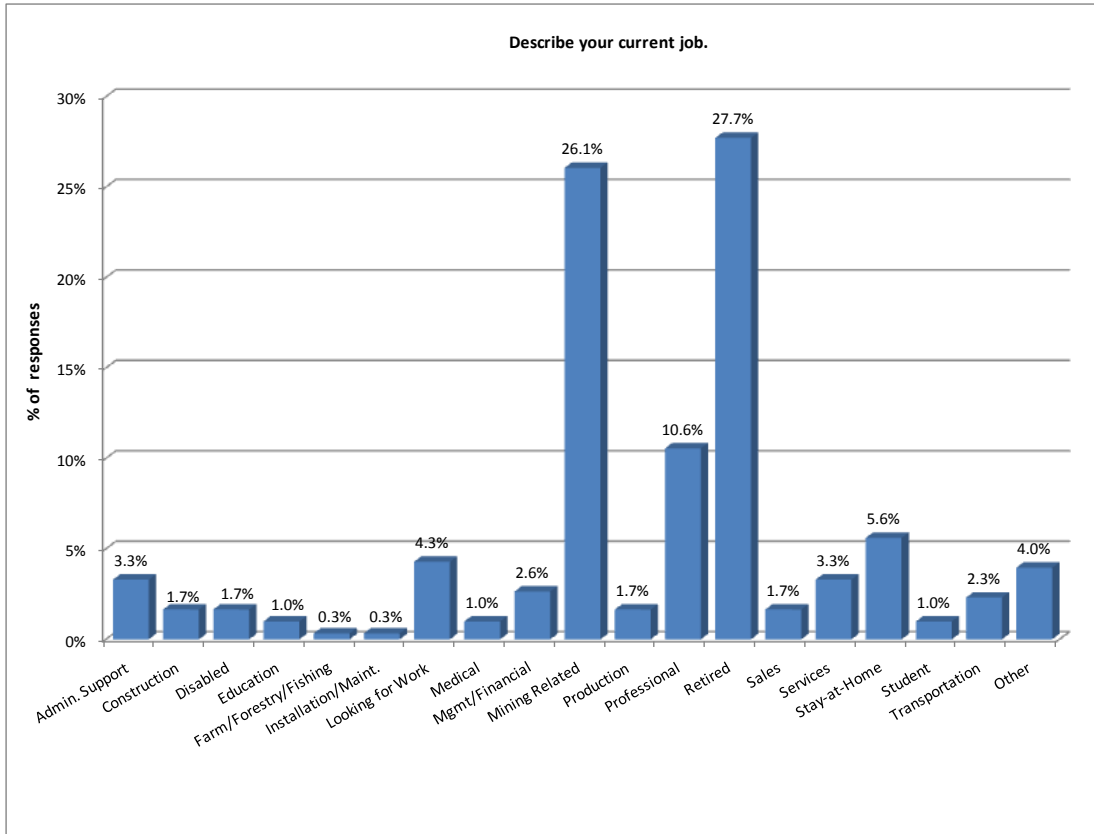
What is the highest level of formal education you have completed?

Response rate of 99.67 percent.



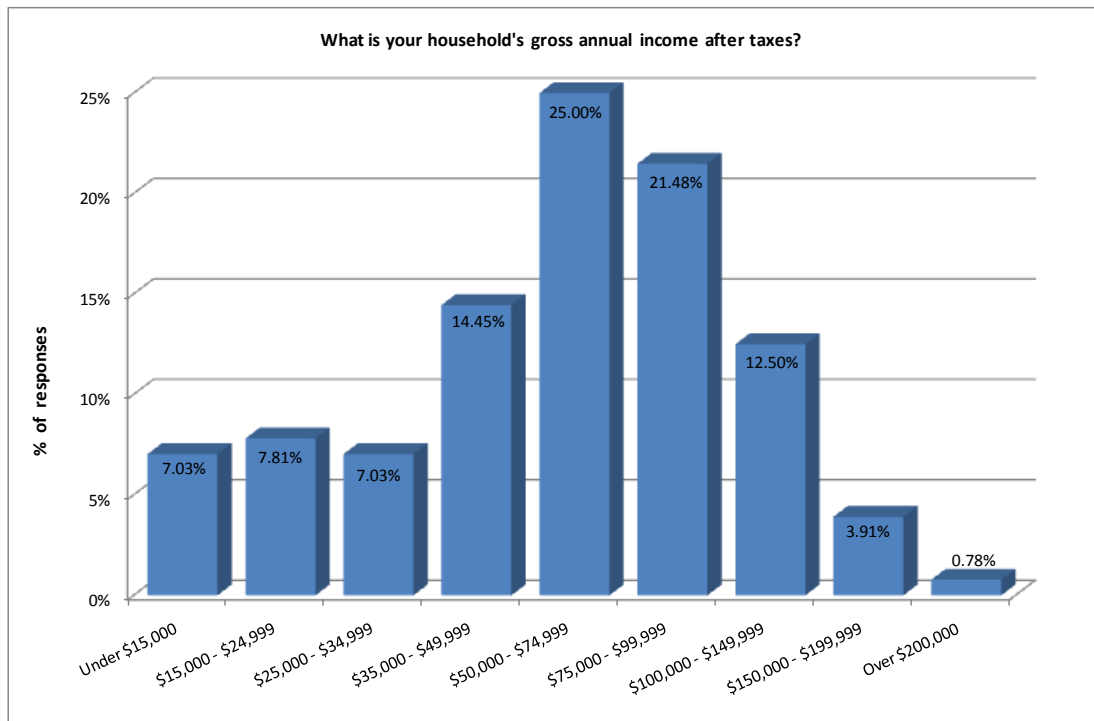
How would you describe your current job?

Response rate of 99.34 percent. This was the only general demographic question that contained an "Other" category in the original survey. There were 38 "Other" answers, 26 of which were incorporated into the existing categories or represented in "Education", "Medical", or "Disabled", these categories were created for three or more written-in responses.



What is your household's gross annual income after taxes?

Response rate of 83.93 percent.



Comments

A final section was included so respondents could record general thoughts or comments. The following is a sampling of some comments of interest.

- Western market owner said we have to raise prices because the dollar store is taking some of our business last time we shopped there. We shop Elko because of selection and prices. Gas here is almost always high.
- The worst thing about BM is the junk and garbage. No one does anything about it.
- If Battle Mountain considered boom/bust why not cater to mine workers? Need: extended bank hrs, and 7 day Pharmacy.
- The swimming pool needs to be bigger and updated so that the kids can have a swim team. There needs to be a non-religious club for kids, e.g. Boys and Girls Club and have teen open and/or work (15+) at a movie theater, etc. Plant trees.
- Lander County had the opportunity to restore the Argenta marsh, which was once a viable wildlife and recreation area. In Battle Mountain local yard sales are a big attraction among the residents.
- I am tired of small town business owners running everything in BM. It costs a fortune to eat and buy anything in town. Won't allow anything new in town. Help!
- Would like to see the bowling alley reopen and the construction of an indoor swimming pool that would be open year.
- Better medical facilities and schools. Do something about the railroad stopping emergency vehicles from going from one side of town to the other. Get rid of old buildings. (paraphrased)
- Battle Mountain could be so much better if those in control would let it. Prices here are way too high, lousy cooks & service. We need more variety and better prices.
- Need to bring in more small-to-medium industrial companies, like warehousing and manufacturing. Need more tourist events, e.g. Pony Express Race. Biggest problem, older families/businesses owners do not want competition or Battle Mountain to grow.
- We have a huge airport runway. Use it to our advantage. Ignore the whiners out in Hill Top regarding noise.
- I wish anyone luck if they ever want to try and establish a business in Battle Mountain. Franchise owner had to jump through hoops to pass all the building codes. I doubt the commissioner-owned businesses have had to do the same.
- The town makes it hard for businesses to come to the town. County should welcome new business to town; also make homeowners clean up (trash and old cars in front of homes).
- A pet supply store would never prosper in Battle Mountain but a 12-20 run boarding kennel with grooming would. Isn't it a shame that banks are anti-small business?

- I buy the bulk of my groceries and gasoline in town. I buy most of my prescriptions in town. I try to support this town but am tired of our elected officials giving all new businesses a hard time.
- Essential businesses have a hard time. Business can't remain without a profit.
- I hope Battle Mountain remains small. No growth is good for me. Keep your social mess in Reno and Vegas.
- I believe BM is a strong community; its appearance has never recovered from the shift of downtown to the newer freeway exit. There are many ugly buildings and such. Slowly but surely it's improving.
- I heard you had a chance at Walmart when I first moved out here 6 years ago and you turned it down. I understand you want to keep the town small but all you've done is force us to shop elsewhere. You don't have the stores that carry what we need.
- Desperately needs daycare/child care, more activities (bowling, movies, arcade) for youth so they stay out of trouble/drugs/sex/drinking & boredom in general (a YMCA/YWCA would be awesome). We also need more activities/opportunities for seniors.
- The biggest problem with Battle Mountain and Lander County is we have no enforcement of building & county codes.
- We price in town and buy, but prices are sometimes better at other stores. We had a chance for other stores, but city fathers do not want them in.
- Auto parts are too expensive, as are groceries. Entertainment is limited to gambling & drinking or racing. A theater, bowling alley/arcade would be great. We need events again-we've lost the Pony Express, Bluegrass Festival & Armpit events.
- I would like to help.
- We need more jobs: warehousing, have a lot of space for it.

Conclusions

- Fifty-one percent of respondents were between the ages of 45 and 64. The number of people residing in the average respondent's household was 2.8. Fifty-seven percent were female. Sixty-five percent had no children living at home. Twenty-six percent worked in the mining industry and 28 percent were retired. A household income of \$50,000 to \$75,000 was reported by 25 percent of the respondents.
- Very little frequent shopping occurs in Battle Mountain. Approximately 83 percent of all Battle Mountain business types were reportedly patronized once per week or less. Only "Grocery Shopping" was reported at a frequency greater than once per week.
- "Auto Parts", "Pharmacy", and "Florists" were the only goods reported to be purchased primarily in Battle Mountain. Even "Groceries" were reported to be purchased primarily outside of Battle Mountain. Though "Groceries" were reported to be purchased more than once a week in a prior question, this may be last minute items rather than the majority of grocery purchase.

- Elko, Winnemucca, and Reno/Sparks shopping areas were reported to provide the greatest competition to the Battle Mountain retail sector. In fact for all shopping frequencies, Elko even out-competed Battle Mountain 286 to 282.
- The desire for a Walmart in Battle Mountain was a re-occurring theme. Approximately 29 percent of respondents listed it as the business they would most like to see open in Battle Mountain. Approximately 32 percent of respondents stated that Walmart is the biggest shopping draw in other communities.
- Respondents listed "increased business mix" and "lower prices" as improvements that could most help the business sector. Prices and availability were also reported as the most important factor when making purchasing decisions, especially for "Groceries".
- Battle Mountain residents eat out infrequently, on average once-a-month or less regardless of the type of restaurant or daily meal. However, dinner and more casual dining are preferred over other meals and fine dining. The specific restaurant types most desired in Battle Mountain are Chinese/Japanese and a bakery.
- Respondents would like to see more senior and youth activities and services offered. They do not have a preference for independent stores over chains.
- Approximately 77 percent of respondents listed other Nevada towns as small cities with attractive downtown areas. Elko and Winnemucca were the most frequently listed attractive small cities.

SECTION IV

MARKET SEGMENTATION FOR DOWNTOWN BATTLE MOUNTAIN

SECTION IV

MARKET SEGMENTATION FOR DOWNTOWN BATTLE MOUNTAIN

The trade area for Battle Mountain businesses is the area where most customers who patronize Battle Mountain businesses live. The most accurate way to find and define trade areas is to use actual customer data obtained by businesses on customer addresses, ZIP codes and amount of purchase. This method is known as “customer spotting”.¹ Different businesses may have very different trade areas, however, and the customer spotting method requires a lot of data collection. Another method for defining trade areas is using average driving times. This method uses existing data and results can be found quickly. Average drive times combined with ZIP code areas are used in this report to define Battle Mountain trade areas. Since some of the ZIP code areas are large, actual drive times vary within the ZIP code areas. Three trade areas have been defined: the primary trade area consists of the population within ZIP code areas that are a 0 to 15 minute drive from downtown Battle Mountain, the secondary trade region includes the population within ZIP code regions that are a 15 to 30 minute drive time and the tertiary trade region is the population within ZIP code regions that are a 30 to 60 minute drive time. The ZIP codes included in each type of trade area are as follows:

Battle Mountain Primary Area consists of ZIP codes (see Figure 1):

- 89820 (Battle Mountain)

Battle Mountain Secondary Area consists of ZIP codes (see Figure 2):

- 89820 (Battle Mountain)
- 89414 (Golconda portion of Valmy/Golconda)

Battle Mountain Tertiary Area consists of ZIP codes (see Figure 3):

- 89820 (Battle Mountain)
- 89414 (Golconda portion of Valmy/Golconda)
- 89445 (Winnemucca/Grass Valley)
- 89821 (Crescent Valley)
- 89822 (Carlin)

Battle Mountain Primary Trade Area, as defined above, was home to nearly 4,916 people living in close to 1,738 households in 2010. The Secondary Trade Area contained an estimated 5,412 people in 1,925 households, while the Tertiary Trade Area contained an estimated 25,177 people in 8,865 households. The people living within

¹ This section follows the organization found in Program on Applied Demographics, Cornell University, (2004). *Downtown Auburn Business Improvement District*. Ithaca, NY: Cornell University.

the Tertiary Trade Area make up the majority of customers for most businesses in Battle Mountain. In order to learn more about this customer base, ESRI Tapestry Segmentation Profile data is examined.

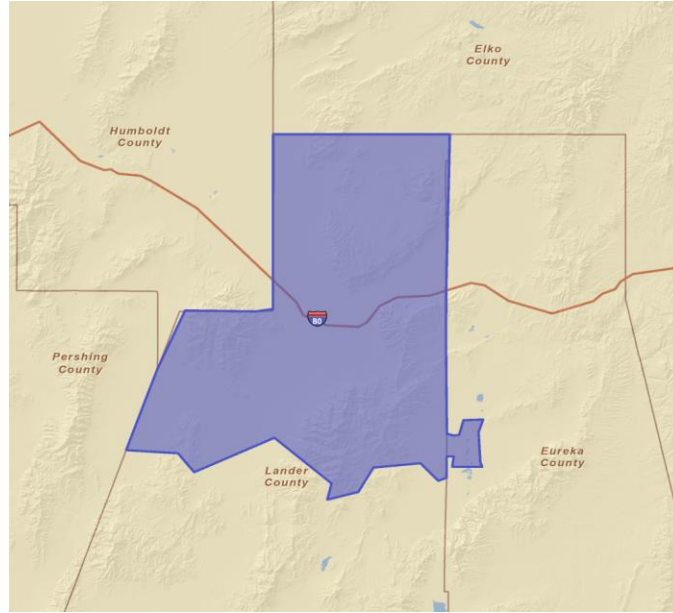


Figure 1. Battle Mountain Primary Area (0 to 15 minute drive).

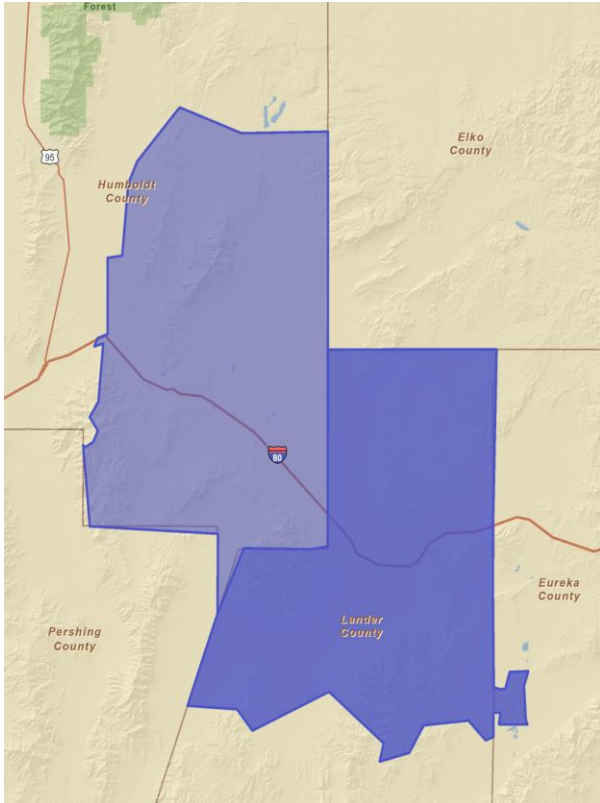


Figure 2. Battle Mountain Secondary Area (15 to 30 minute drive).

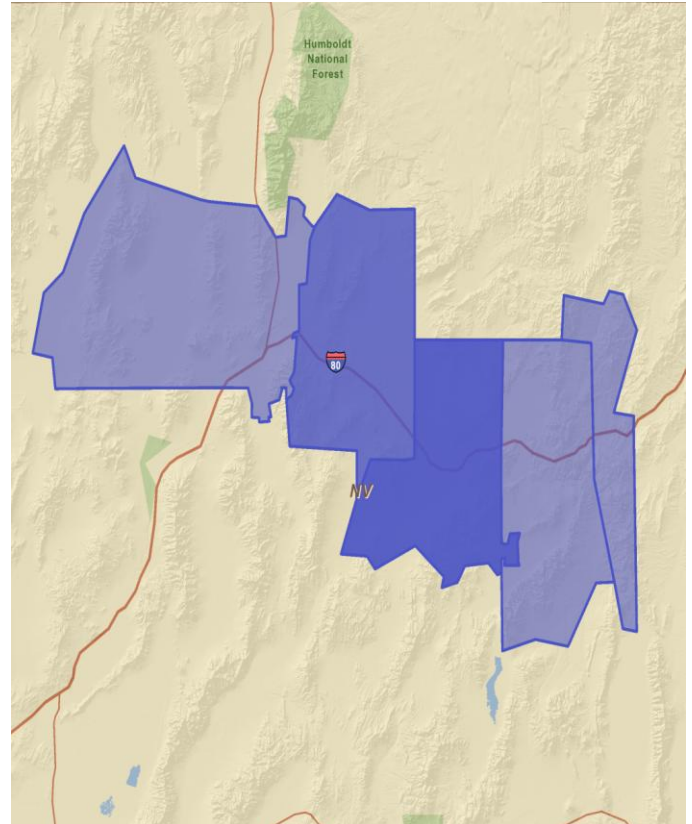


Figure 3. Battle Mountain Tertiary Area (30 to 60 minute drive).

Classification of Neighborhoods Using Tapestry Segmentation Profiles for Battle Mountain Trade Areas

ESRI Business Analyst On-line has developed profiles for neighborhoods by using U.S. Census and other data. Using detailed Census data on sex, age, education, income, occupation, household composition, housing characteristics, and so forth, in combination with other private and public data sources, ESRI models divide cities into neighborhood types thought to best represent the types of families choosing to live there. ESRI uses 65 detailed profiles for neighborhood type, each of which is a member of 12 "Life Mode Summary Groups" with similar socio-economic status and age cohorts. Of course, the categories will not exactly describe each household in a neighborhood but market specialists have found the profiles useful in understanding the general nature of the customers in a particular neighborhood. A summary of the ESRI profiles for those most commonly found in the Battle Mountain Trade Areas is below. The detailed distribution can be found in Appendix C along with ESRI's full description of each of the tapestry segments.

Battle Mountain Primary Trade Area

The estimated 4,916 households within the primary trade area for Battle Mountain fall into two Life Mode Groups: Family Portrait (35.8 percent) and American Quilt (64.2 percent). These are defined as follows:

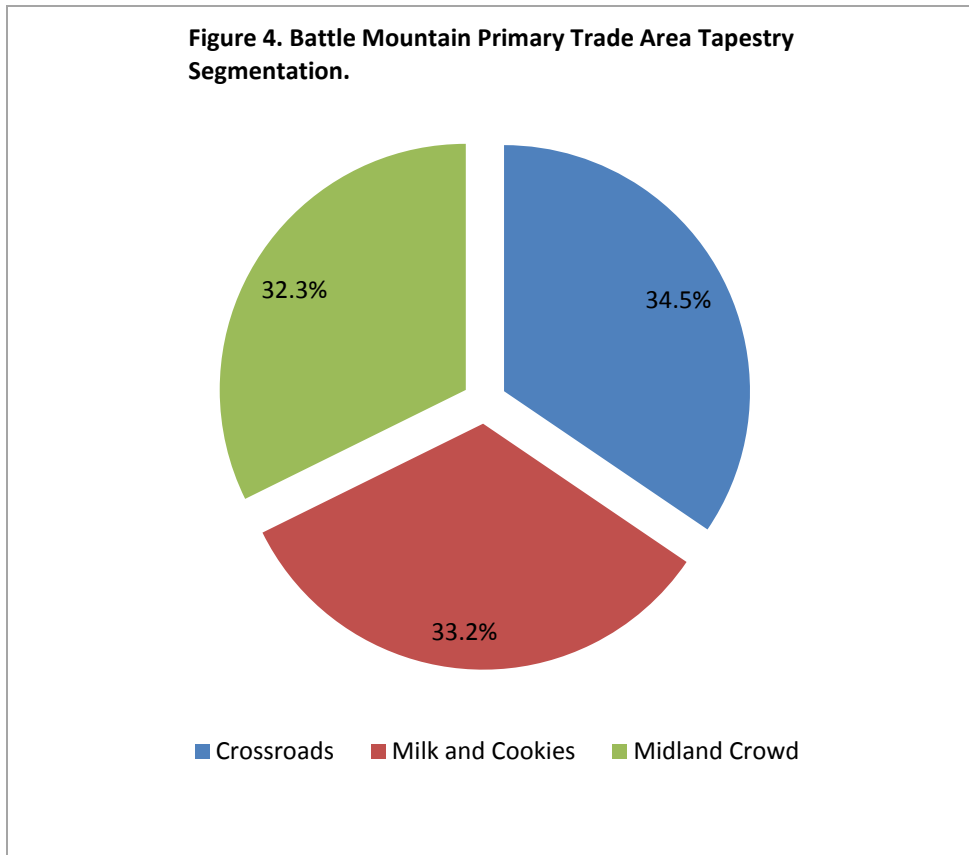
Family Portrait: Ethnically diverse fast growing population.

American Quilt: Households in small towns and rural areas.

Within each of these two Life Mode Groups, Battle Mountain Primary Trade Area neighborhoods are further classified as belonging to one of the 65 detailed sub-groupings. Figure 4 summarizes the make-up of the Battle Mountain Primary Trade Area according to these sub-groupings. The "American Quilt" group has been categorized into two sub groupings, "Crossroads" and "Midland Crowd". The "Crossroads" segment makes up the larger portion (38.2 percent) for Battle Mountain Primary Trade Area. An abridged ESRI description of this sub grouping follows; for a full description see Appendix C.

Crossroads: Growing communities in small towns, median age of 32.1, population growing 1.6 percent annually, educational attainment is lower than the U.S. average, mobile homes, one in five is Hispanic, mindful of their expenses, shop at discount stores, priorities are their families and cars, investing and saving for retirement are a low priority, watch NASCAR and other sports on TV, prefer country and contemporary hit music, read magazines, especially automotive, boating, motorcycle, and fishing publications, they go fishing and watch movies on DVD.

Figure 4. Battle Mountain Primary Trade Area Tapestry Segmentation.



Under the “American Quilt” category, another 26 percent of the primary trade area households fall into the sub-category “Midland Crowd”, described by ESRI as follows:

Midland Crowd: Married-couple families, median age of 37.0, middle class, professional, management or skilled occupations, high school graduates or some college education, single family homes, mobile homes, white, have pets, hobbies are hunting and fishing, have personal line of credit, read hunting and fishing magazines, own or lease trucks.

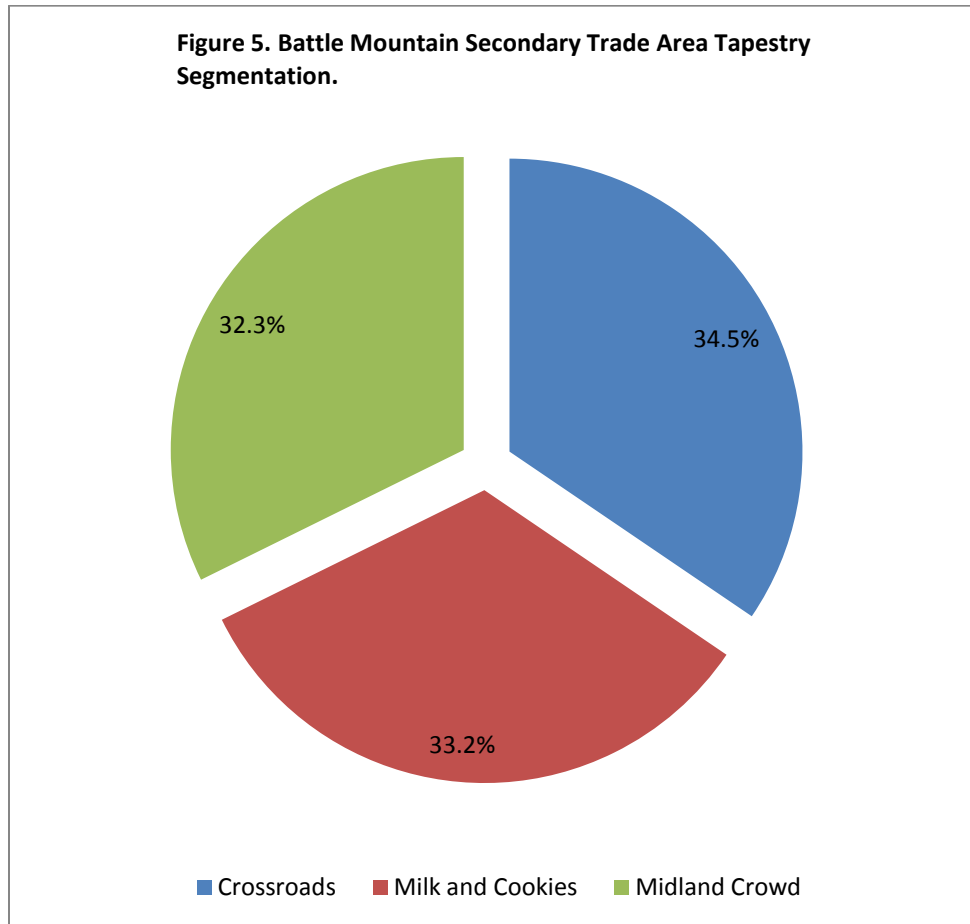
Under the “Family Portrait” category, the full 35.8 percent falls under “Milk and Cookies”, described by ESRI as follows:

Milk and Cookies: Young, affluent married couples who are starting families or already have young children, median age of 33.7, slightly above-average ratios of black and Hispanic residents, 71 percent in labor force, 58 percent have attended college, more than 20 percent hold bachelor’s or graduate degrees, use a credit union, have overdraft protection, and usually have a new car loan, prefer larger vehicles, own a dog, frequently buy fast food and diners from grocery store to save time, watch sports, work on their lawns, tackle interior painting projects, or do maintenance on their vehicles

For full description of the Midland Crowd segment, Milk and Cookies, and Crossroads see Appendix C.

Battle Mountain Secondary Trade Area

The 1,925 households included in the larger Secondary Trade Area are similar to the Primary Trade Area. Figure 5 shows the similarity in sizes of the three categories. The three categories remain “Crossroads” (34.5 percent), “Midland Crowd” (33.2 percent), and “Milk and Cookies” (32.3 percent). Brief ESRI descriptions are below. See Appendix C for full descriptions.



Crossroads: Married couples with and without children and single parents, median age 32.1, lower middle class, occupations in skilled trades or services, no high school diploma or high school graduates, mobile homes, white, hobbies are watching movies on DVD or playing volleyball and softball, do banking in person and read fishing and hunting magazines.

Milk and Cookies: Young, affluent married couples who are starting families or already have young children, median age of 33.7, slightly above-average ratios of black and Hispanic residents, 71 percent in labor force, 58 percent have attended college, more than 20 percent hold bachelor’s or graduate degrees, use a credit union, have overdraft protection, and usually have a

new car loan, prefer larger vehicles, own a dog, frequently buy fast food and diners from grocery store to save time, watch sports, work on their lawns, tackle interior painting projects, or do maintenance on their vehicles.

Midland Crowd: Married-couple families, median age of 37.0, middle class, professional, management or skilled occupations, high school graduates or some college education, single family homes, mobile homes, white, have pets, hobbies are hunting and fishing, have personal line of credit, read hunting and fishing magazines, own or lease trucks.

Battle Mountain Tertiary Trade Area

The tertiary trade area includes Golconda, Winnemucca, Battle Mountain, Crescent Valley and Carlin. This Tertiary Trade area holds 8,865 households and a population of 25,177. The Tertiary area contains new Life Mode Groups such as "High Society", containing 8.3 percent of the total households, and "Traditional Living", containing 7.6 percent of tertiary households. These categories are described as below:

High Society: Affluent, well-educated, married-couple homeowners.

Traditional Living: Hardworking, settled families.

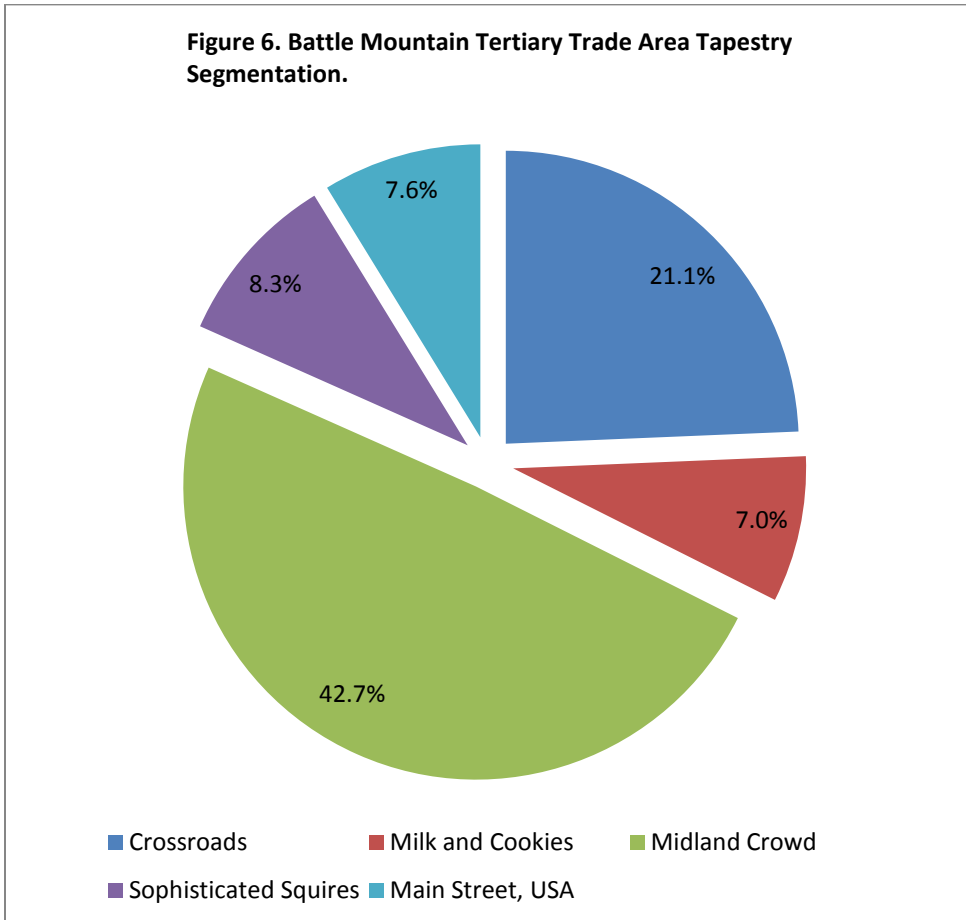


Figure 6 illustrates the ESRI tapestry segmentation for Battle Mountain Tertiary Trade Area. There were six categories which indicate how diverse the larger tertiary region is. Almost 43 percent of the region's households are assigned to the Midland Crowd segment, and 21.1 percent to the Crossroads segment. Midland Crowd remains the dominant type of American Quilt household. The ESRI description of the "Sophisticated Squires" and "Main Street, USA" category is described below.

Sophisticated Squires: Married couples with kids, median age 38.2, enjoy cultured country life, accept longer commutes to live near fewer neighbors, educated, many drive minivans or full-size SUVs, do-it-yourselfers, attend football or baseball games, listen to soft adult contemporary music and sports radio, favorite TV programs include, news, comedies, drama and home and garden.

Main Street USA: Mix of household types, approximately ½ households are married-couple families, One-third are single-person or shared households, the rest are single-parent or other family households, median age is 36.7, less diverse than U.S. population, family oriented and frugal, may go out to eat or to movies but most likely stay home, own pet cats, listen to classic hits and rock radio, go to theme parks, beginning to shop online, watch cartoons and courtroom shows on TV.

A complete description of the Tapestry Segmentation Profiles as well as detailed distributions of the segments can be found in Appendix C.

Demographics

More detailed demographic data for the Battle Mountain trade areas is presented in Figures 7 through 19 and in Tables 1 through 7.

Population

Table 1. Population Trends, 2010 and 2015.

Trade Area	2010	2015	Percent Change	Number Change
Primary	4,916	4,682	-4.8%	-234
Secondary	5,412	5,218	-3.6%	-194
Tertiary	25,177	25,985	+3.2%	+808
Total Region	35,505	35,885	+1.1%	+32,380

Source: ESRI

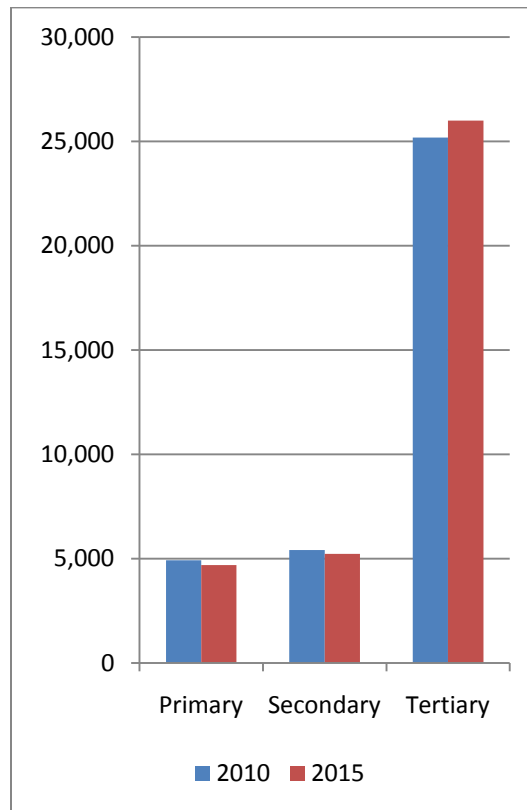


Figure 7. Population Trends, 2010 and 2015.

Summary

- The primary trade area in Battle Mountain is expected to decrease by 4.8 percent from 2010 to 2015.
- The Primary and Secondary trade areas are projected to decrease but the Tertiary trade area is expected to increase.
- The total region's population is expected to grow over 1 percent which in absolute terms is nearly 32,000 people.

Age Change Graphs, Primary Trade Area

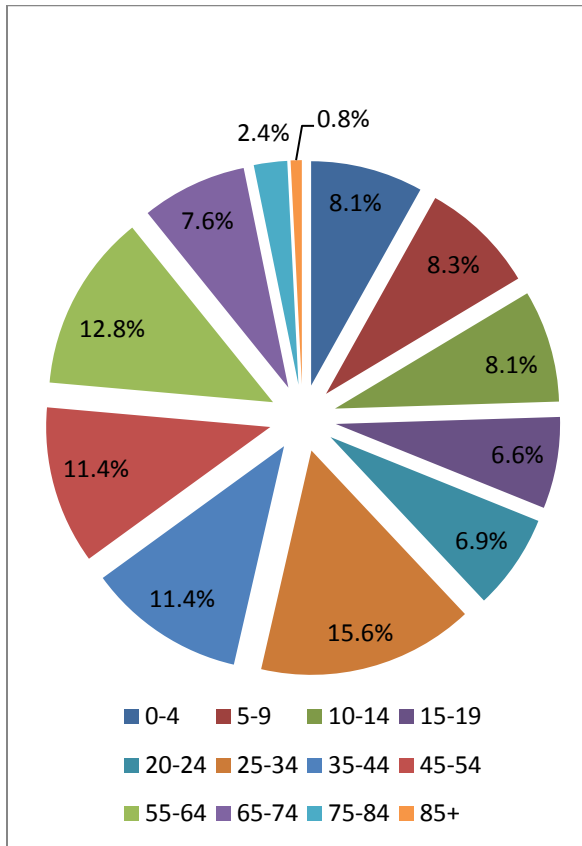


Figure 8. Primary Percent Age Distribution, 2010.

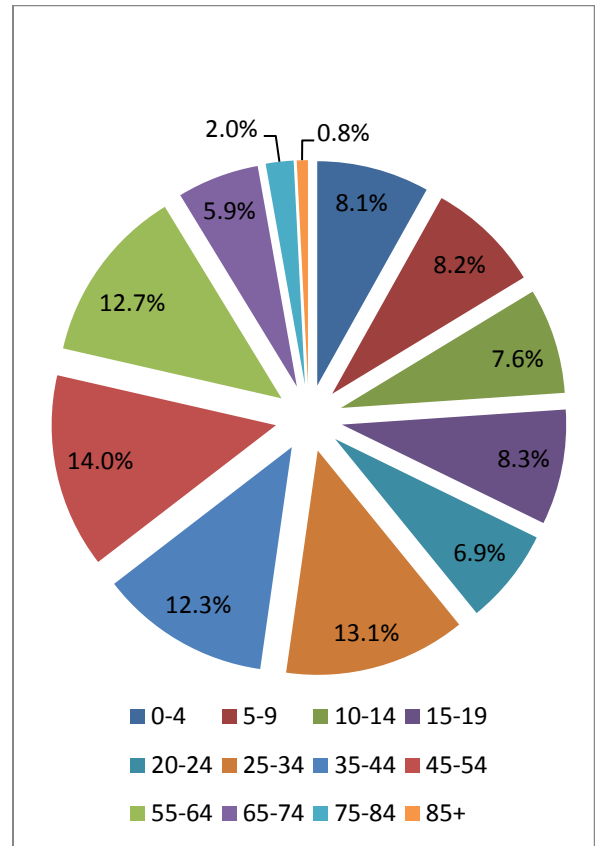


Figure 9. Primary Percent Age Distribution, 2015.

Summary:

- The age distribution in Battle Mountain's primary trade area is expected to change very little between 2010 and 2015.
 - In 2010, 39.1 percent of the population was between the ages 0 and 24. In 2015, this age group is expected to be 38 percent of the population.
 - In 2010, 25.4 percent of the population was between the ages 25 and 44. In 2015, this age group is expected to be 27 percent of the population.
 - In 2010, 26.7 percent of the population was between the ages 45 and 64. In 2015, this age group is expected to be 24.2 percent of the population.
 - In 2010, 8.7 percent of the population was 65 or older. In 2015, this age group is expected to be 10.8 percent of the population.

Age Change Graphs, Secondary Trade Area

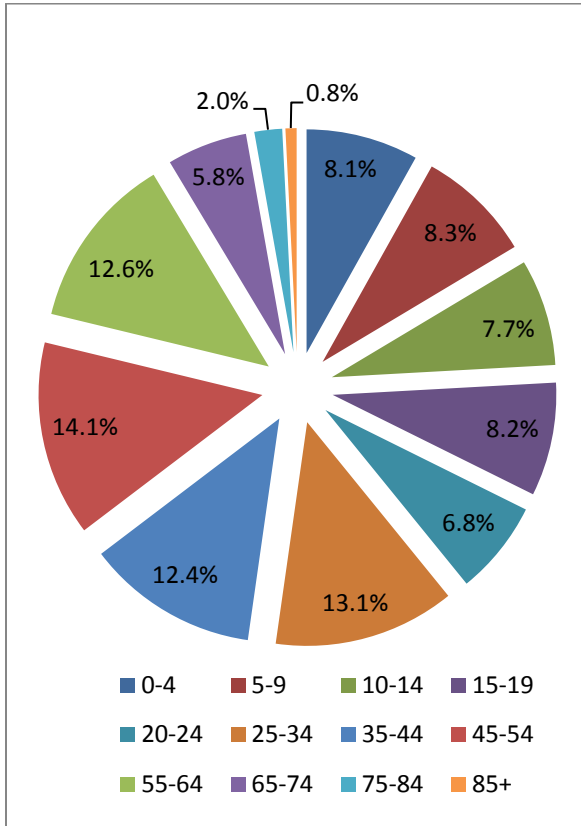


Figure 10. Secondary Percent Age Distribution, 2010.

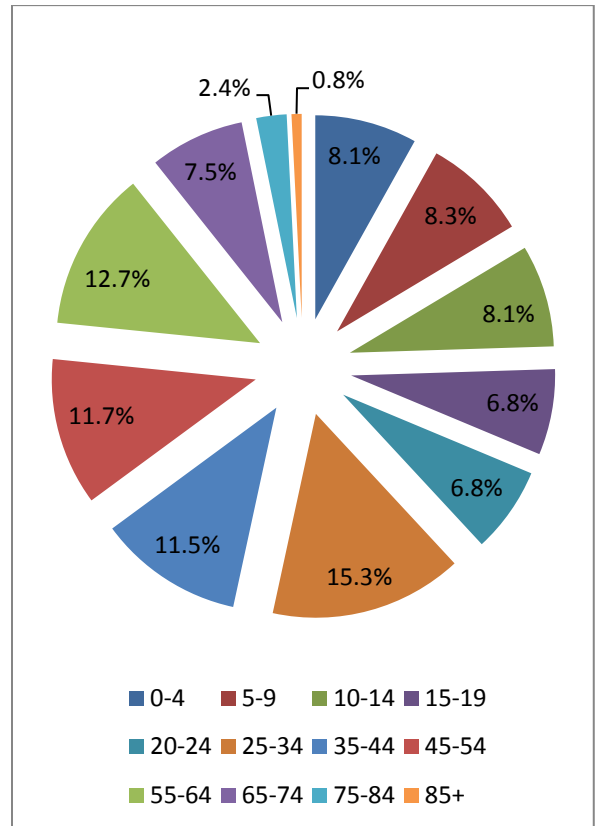


Figure 11. Secondary Percent Age Distribution, 2015.

Summary

- The age distribution in Battle Mountain's Secondary trade area is expected to change very little between 2010 and 2015.
 - In 2010, 39.1 percent of the population was between the ages 0 and 24. In 2015, this age group is expected to be 38.1 percent of the population.
 - In 2010, 25.5 percent of the population was between the ages 25 and 44. In 2015, this age group is expected to be 26.8 percent of the population.
 - In 2010, 26.7 percent of the population was between the ages 45 and 64. In 2015, this age group is expected to be 24.4 percent of the population.
 - In 2010, 8.6 percent of the population was 65 or older. In 2015, this age group is expected to be 10.7 percent of the population.

Age Change Graphs, Tertiary Trade Area

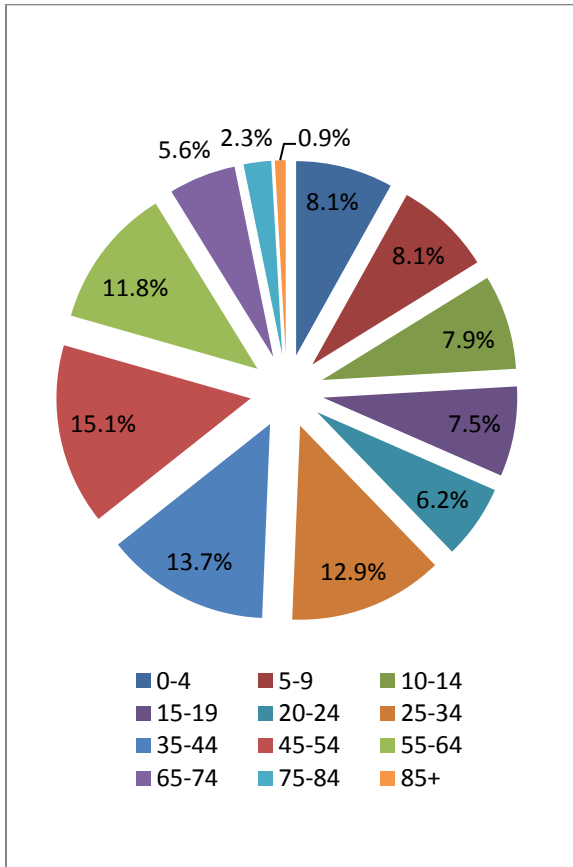


Figure 12. Tertiary Percent Age Distribution, 2010.

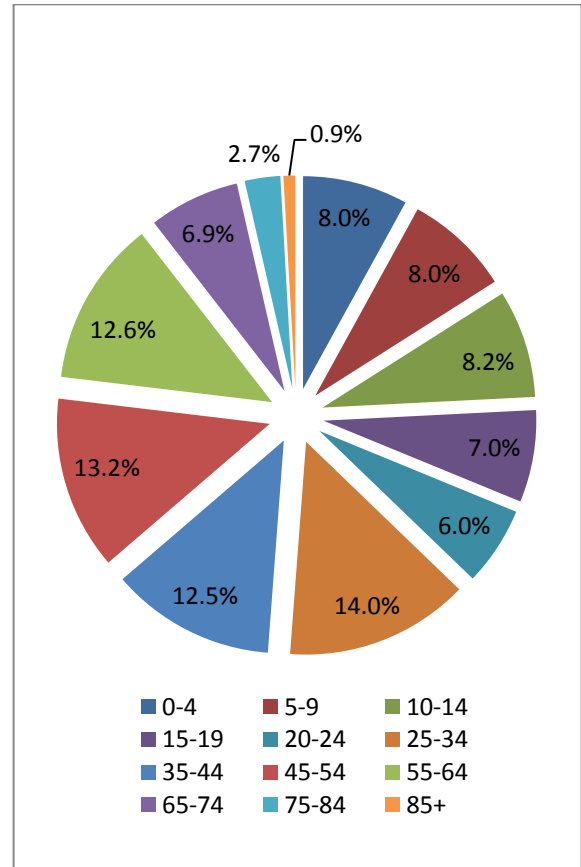


Figure 13. Tertiary Percent Age Distribution, 2015.

Summary:

- The age distribution in Battle Mountain's tertiary trade area is expected to change very little between 2010 and 2015.
 - In 2010, 37.8% of the population was between the ages 0 and 24. In 2015, this age group is expected to be 37.2 percent of the population.
 - In 2010, 26.6% of the population was between the ages 25 and 44. In 2015, this age group is expected to be 26.5 percent of the population.
 - In 2010, 26.9% of the population was between the ages 45 and 64. In 2015, this age group is expected to be 25.8 percent of the population.
 - In 2010, 8.8% of the population was 65 or older. In 2015, this age group is expected to be 10.5 percent of the population.

Table 2. Percent Age Distributions by Trade Area, 2010.

Percent	Percent											
	0-4	5-9	10-14	15-19	20-24	25-34	35-44	45-54	55-64	65-74	75-84	85+
Primary	8.1%	8.2%	7.6%	8.3%	6.9%	13.1%	12.3%	14%	12.7%	5.9%	2%	0.8%
Secondary	8.1%	8.3%	7.7%	8.2%	6.8%	13.1%	12.4%	14.1%	12.6%	5.8%	2%	.8%
Tertiary	8.1%	8.1%	7.9%	7.5%	6.2%	12.9%	13.7%	15.1%	11.8%	5.6%	2.3%	.9%
Total Population												
Primary	398	405	374	407	337	646	605	689	626	290	98	41
Secondary	441	449	419	446	367	707	672	765	682	315	106	43
Tertiary	2049	2030	1983	1884	1552	3242	3440	3811	2960	1420	591	215

Source: ESRI

Table 3. Percent Age Distributions by Trade Area, 2015.

Percent	Percent											
	0-4	5-9	10-14	15-19	20-24	25-34	35-44	45-54	55-64	65-74	75-84	85+
Primary	8.1%	8.3%	8.1%	6.6%	6.9%	15.6%	11.4%	11.4%	12.8%	7.6%	2.4%	0.8%
Secondary	8.1%	8.3%	8.1%	6.8%	6.8%	15.3%	11.5%	11.7%	12.7%	7.5%	2.4%	0.8%
Tertiary	8%	8%	8.2%	7%	6%	14%	12.5%	13.2%	12.6%	6.9%	2.7%	0.9%
Total Population												
Primary	377	387	381	311	324	730	532	535	597	357	113	38
Secondary	424	434	425	354	356	797	599	609	663	393	123	41
Tertiary	2086	2082	2125	1814	1561	3648	3248	3432	3286	1789	690	224

Source: ESRI

Table 4. Percent of Households by Income, 2010.

Percent									
	< \$15,000	\$15,000- \$24,999	\$25,000- \$34,999	\$35,000- \$49,999	\$50,000- \$74,999	\$75,000- \$99,999	\$100,000- \$149,999	\$150,000- \$199,999	\$200,000+
Primary	10.1%	7.5%	8.5%	14.4%	32%	15.2%	11%	1%	0.1%
Secondary	9.9%	7.5%	8.8%	14.6%	32.8%	14.4%	10.6%	0.9%	0.3%
Tertiary	8.6%	7.6%	8.6%	13.4%	33.0%	13.8%	12.1%	1.6%	1.3%
Total Population									
Primary	176	130	148	251	557	265	192	17	2
Secondary	190	144	170	282	632	278	205	18	6
Tertiary	764	675	759	1,192	2,927	1,224	1,069	141	114

Source: ESRI

Table 5. Percent of Households by Income, 2015.

Percent									
	< \$15,000	\$15,000- \$24,999	\$25,000- \$34,999	\$35,000- \$49,999	\$50,000- \$74,999	\$75,000- \$99,999	\$100,000- \$149,999	\$150,000- \$199,999	\$200,000+
Primary	7.7%	6%	7.1%	11.2%	34.1%	16%	16.3%	1.6%	0.1%
Secondary	7.4%	6%	7.3%	11.4%	35.3%	15.1%	15.7%	1.5%	0.4%
Tertiary	6.2%	5.9%	6.9%	9.9%	35.3%	14.2%	17.3%	2.6%	1.6%
Total Population									
Primary	127	100	117	186	565	265	270	26	2
Secondary	138	111	135	211	656	280	292	28	8
Tertiary	572	542	628	908	3,231	1,298	1,588	237	151

Source: ESRI

Household Income Distribution, Primary Trade Area

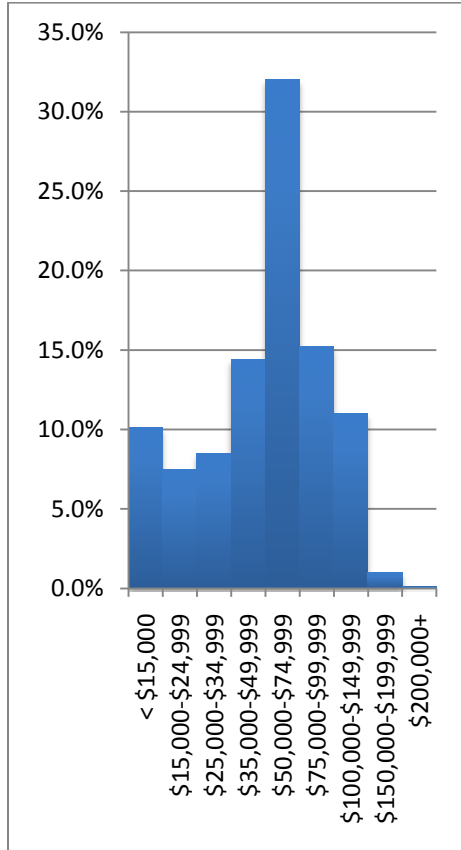


Figure 14. Household Income Distribution for Primary Trade Area, 2010.

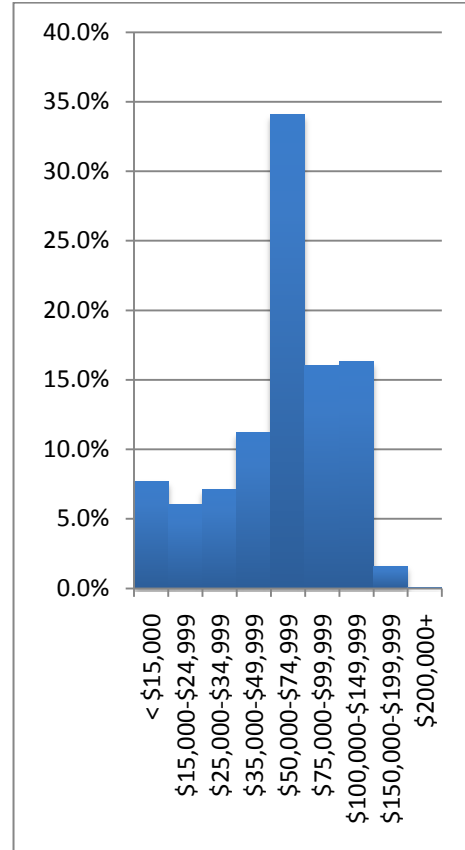


Figure 15. Household Income Distribution for Primary Trade Area, 2015.

Summary:

- The income distribution in 2010 was positively skewed meaning that there was a higher concentration on the left (smaller income) side in 2010. There were a large percentage of people in the median income level.
 - 40.5 percent earned less than \$50,000, 32 percent earned between \$50,000 and \$74,999, and 27.3 percent earned \$75,000 or more.
- The income distribution in 2015 shifts to more negatively skewed, meaning that there is a high concentration of the right (larger income) side. A large percentage of people remain in the median income level.
 - 32 percent earned less than \$50,000, 34.1 percent earned between \$50,000 and \$74,999, and 34 percent earned \$75,000 or more.

Household Income Distribution, Secondary Trade Area

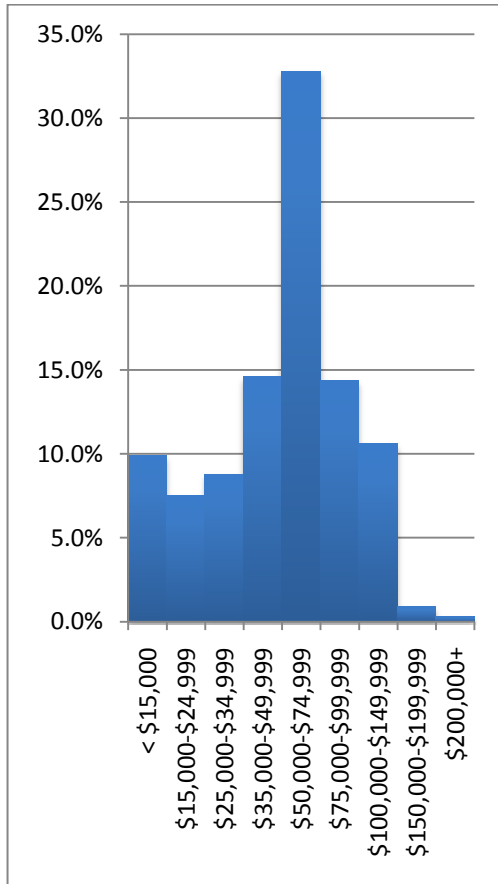


Figure 16. Household Income Distribution for Secondary Trade Area, 2010.

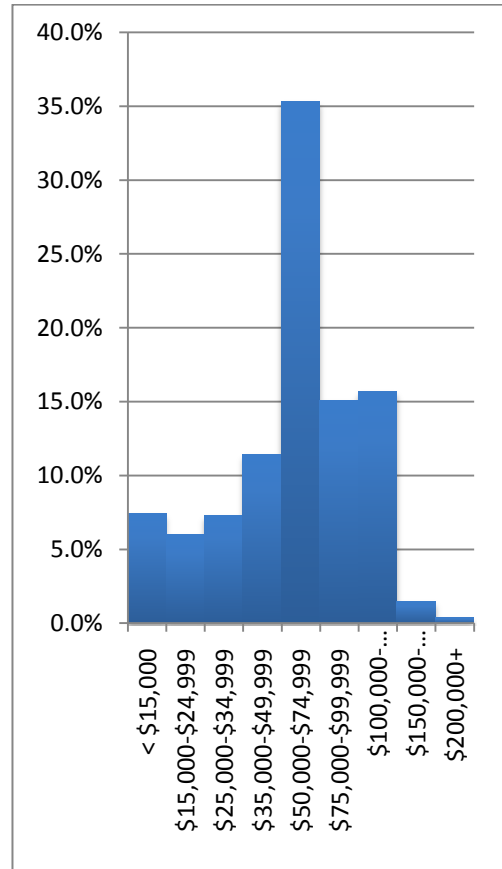


Figure 17. Household Income Distribution for Secondary Trade Area, 2015.

Summary:

- The income distribution was positively skewed meaning that there was a higher concentration on the left (smaller income) side in 2010. There were a high percentage of people in the median income level.
 - 40.8 percent earned less than \$50,000, 32.8 percent earned between \$50,000 and \$74,999, and 27.3 percent earned \$75,000 or more.
- The income distribution in 2015 is more normally distributed with a larger percentage of people in the median income intervals.
 - 32.1 percent earned less than \$50,000, 35.3 percent earned between \$50,000 and \$74,999, and 32.7 percent earned \$75,000 or more.

Household Income Distribution, Tertiary Trade Area

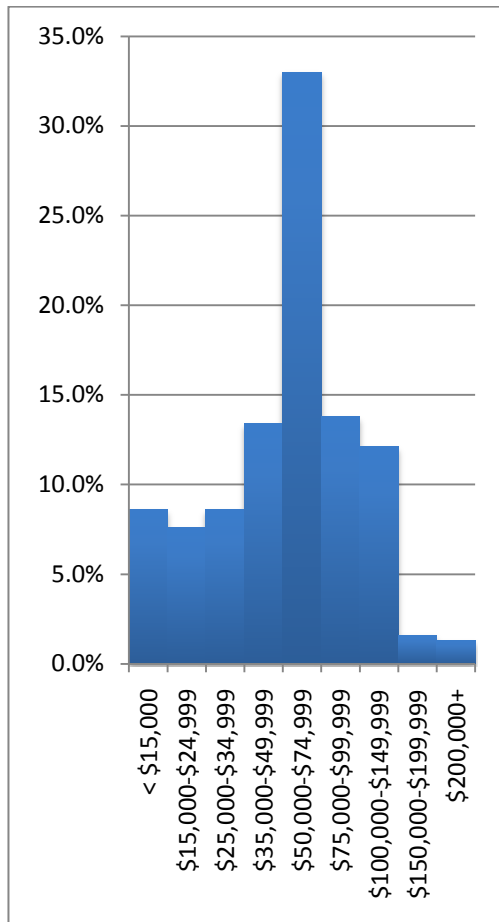


Figure 18. Household Income Distribution for Tertiary Trade Area, 2010.

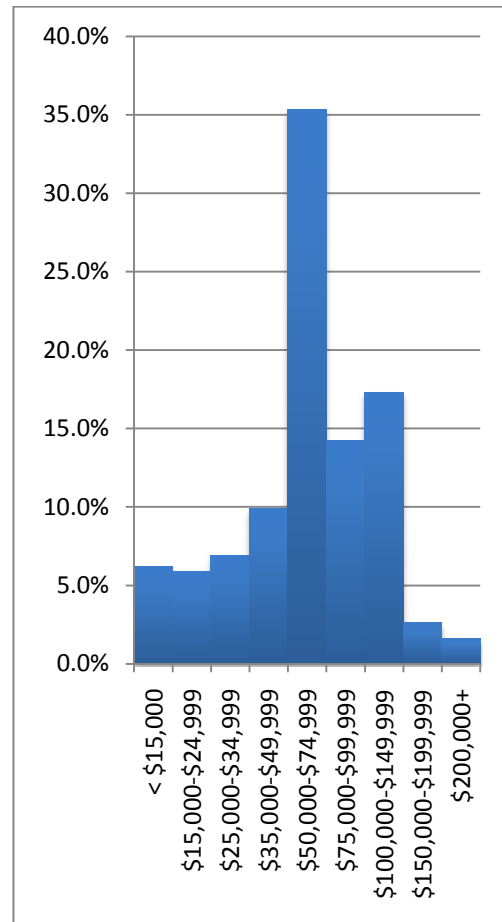


Figure 19 . Household Income Distribution for Tertiary Trade Area, 2015.

Summary:

- The income distribution was positively skewed meaning that there was a higher concentration on the left (smaller income) side in 2010.
 - 38.2 percent earned less than \$50,000, 33 percent earned between \$50,000 and \$74,999, and 28.8 percent earned \$75,000 or more.
- The income distribution in 2015 is negatively skewed meaning that there is projected to be a higher concentration on the right (larger income) side.
 - 28.9 percent earned less than \$50,000, 35.3 percent earned between \$50,000 and \$74,999, and 35.7 percent earned \$75,000 or more.

Table 6. Households Disposable Income, 2010.

Percent									
	< \$15,000	\$15,000- \$24,999	\$25,000- \$34,999	\$35,000- \$49,999	\$50,000- \$74,999	\$75,000- \$99,999	\$100,000- \$149,999	\$150,000- \$199,999	\$200,000+
Primary	12.1%	9.8%	10.5%	22.4%	29.3%	9.6%	6%	0.2%	0.1%
Secondary	11.8%	10%	10.9%	22.8%	29%	9.1%	5.8%	.03%	0.2%
Tertiary	10.5%	10.1%	10.4%	22%	28.6%	9.7%	7.1%	0.7%	0.8%
Total Population									
Primary	211	171	183	389	509	166	105	3	1
Secondary	228	193	209	439	559	176	112	5	4
Tertiary	932	891	926	1,953	2,539	863	627	59	75

Source: ESRI

Summary:

- Both median and average disposable income increase as the trade area expanded.
 - The median disposable income in the primary trade area was \$45,645.
 - The average disposable income in the primary trade area was \$50,272.
 - The median disposable income in the secondary trade area was \$45,195.
 - The average disposable income in the secondary trade area was \$50,468.
 - The median disposable income in the tertiary trade area was \$47,175.
 - The average disposable income in the tertiary trade area was \$54,766.

Table 7. Households Net Worth, 2010.

Percent										
	< \$15,000	\$15,000- \$34,999	\$35,000- \$49,999	\$50,000- \$74,999	\$75,000- \$99,999	\$100,000- \$149,999	\$150,000- \$249,999	\$250,000- \$499,999	\$500,000- \$999,999	\$1,000,000+
Primary	26.1%	8.2%	6.2%	11.2%	6.3%	9.7%	14.4%	12.1%	4.7%	1.1%
Secondary	25.8%	8.3%	6.2%	11.3%	6.3%	10%	14.2%	11.7%	4.4%	1.8%
Tertiary	23.1%	8.9%	6%	10%	6.8%	10.6%	14%	11.5%	5.2%	4%
Total Population										
Primary	453	143	108	195	109	169	250	211	81	19
Secondary	497	160	119	217	122	193	273	226	84	34
Tertiary	2,049	791	535	884	599	939	1,237	1,017	458	356

Source: ESRI

Summary:

- The median net worth increases as the trade area expanded.
 - The median net worth in the primary trade area was \$70,058.
 - The median net worth in the secondary trade area was \$70,465.
 - The median net worth in the tertiary trade area was \$81,189.

Conclusions

Market segmentation can be used by Battle Mountain retailers to target their retail efforts. The information on these neighborhoods can be used in a variety of ways. First is for Battle Mountain merchants to better understand who their customers are – both actual and potential. Merchants who are able to gather detail customer spotting information can combine that with neighborhood types data to determine if their “best customers” are concentrated in only a couple neighborhood types. Who your customers are tells you a great deal about how your marketing strategy is perceived by customers. Merchants may then choose to focus on that segment of the market in order to capture more spending. Alternatively, merchants may try to make changes that will broaden their appeal and add customers from other types of neighborhoods – especially those Zip codes close to the store.

SECTION V

ANALYSIS OF RETAIL SECTOR SURPLUSES AND LEAKAGES

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ANALYSIS OF RETAIL SECTOR SURPLUSES AND LEAKAGES

A goal of retail sector analysis for Battle Mountain is to identify retail sector categories that Battle Mountain decision-makers could target to fill existing demand that is leaking out of Battle Mountain. All retail sales and consumer expenditures data presented in this report were developed from ESRI business Analyst Online, a leading national provider of economic and demographic data.

Table 8 shows the existing retail sales ("Supply") in the study area and compares it to the retail potential ("Demand") of study area residents. Table 8 shows retail gap for all retail sectors. Positive values are sales leakages and negative values are sales surpluses.

Sales Leakage

The demand for goods and services that is not met locally is referred to as sales leakage. The sales leakage occurs because consumers make purchases at establishments located outside Battle Mountain. For example as for total Battle Mountain resident retail sales, Battle Mountain residents had retail sales in Battle Mountain of \$12.6 million. However, Battle Mountain residents had retail trade expenditures of approximately \$42.2 million. This means Battle Mountain residents had approximately \$29.7 million of retail sales outside the Battle Mountain Study Area.

Sales Leakage

The demand for goods and services that is not met by Battle Mountain's retail sector is referred to as sales leakage. The leakage occurs because consumers made purchases at establishments located outside Battle Mountain Study Area. For example, there is approximately \$19,456 of retail sales in the Building Materials, Garden Equipment, and Supply Stores Sector in the Battle Mountain Study Area; however, Battle Mountain Study Area residents spent approximately \$1.5 million on these types of goods. Therefore, Battle Mountain Study Area residents spent approximately \$1.498 million outside the study area on Building Material, Garden Equipment, and Supply Store goods. This is the money that has leaked out of the local study area. More retail sector categories exhibit sales leakage for the Battle Mountain Study Area.

Table 8. Spending Potential for Battle Mountain Study Area.

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / Leakage Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$42,232,447	\$12,573,839	\$29,658,608	54.1	26
Total Retail Trade (NAICS 44-45)	\$371,83,306	\$171,512,861	\$25,670,445	52.7	19
Total Food & Drink (NAICS 722)	\$5,049,141	\$1,060,978	\$3,988,163	65.3	7
<u>Transportation:</u>					
Motor Vehicle & Parts Dealers (NAICS 441)	\$8,669,846	\$113,825	\$8,556,021	97.4	2
Automobile Dealers (NAICS 4411)	\$7,636,438	\$0	\$7,636,438	100.0	0
Other Motor Vehicle Dealers (NAICS 4412)	\$589,234	\$0	\$589,234	100.0	0
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$444,174	\$113,825	\$330,349	59.2	2
Gasoline Stations (NAICS 447/NAICS 4471)	\$13,041,772	\$9,476,467	\$3,565,305	15.8	2
<u>Household and Garden Goods:</u>					
Furniture & Home Furnishings Stores (NAICS 442)	\$2,199,282	\$0	\$2,199,282	100.0	0
Furniture Stores (NAICS 4421)	\$2,199,282	\$0	\$2,199,282	100.0	0
Home Furnishings Stores (NAICS 4422)	\$0	\$0	\$0	0.0	0
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$0	\$59,157	-\$59,157	-100.0	1
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$1,517,256	\$19,456	\$1,497,800	97.5	1
Building Material and Supplies Dealers (NAICS 4441)	\$1,517,256	\$19,456	\$1,497,800	97.5	1
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$0	\$0	\$0	0.0	0
<u>Apparel:</u>					
Clothing and Clothing Accessories Stores (NAICS 448)	\$1,405,182	\$47,080	\$1,358,102	93.5	1
Clothing Stores (NAICS 4481)	\$1,145,754	\$47,080	\$1,098,674	98.1	1
Shoe Stores (NAICS 4482)	\$0	\$0	\$0	0.0	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$259,428	\$0	\$259,428	100.0	0
<u>Food and Beverages</u>					
Food & Beverage Stores (NAICS 445)	\$5,941,681	\$1,472,167	\$4,469,519	60.3	5
Grocery Stores (NAICS 4451)	\$5,461,665	\$1,391,869	\$4,069,796	59.4	4
Specialty Food Stores (NAICS 4452)	\$228,728	\$0	\$228,728	100.0	0

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / Leakage Factor	Number of Businesses
Beer, Wine, and Liquor Stores (NAICS 4453)	\$251,288	\$80,298	\$170,990	51.6	1
Food Services & Drinking Places (NAICS 722)	\$5,049,141	\$1,060,978	\$3,988,163	65.3	7
Full-Service Restaurants (NAICS 7221)	\$257,634	\$160,439	\$97,195	23.2	2
Limited-Service Eating Places (NAICS 7222)	\$4,107,738	\$757,857	\$3,349,881	68.8	3
Special Food Services (NAICS 7223)	\$0	\$0	\$0	0.0	0
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$683,769	\$142,682	\$541,087	65.5	2
<u>General merchandises:</u>					
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$0	\$0	\$0	0.0	0
General Merchandise Stores (NAICS 452)	\$2,726,957	\$110,792	\$2,616,165	92.2	1
Department Stores Excluding Leased Depts. (NAICS 4521)	\$1,814,846	\$0	\$1,814,846	100.0	0
Other General Merchandise Stores (NAICS 4529)	\$912,111	\$110,792	\$801,319	78.3	1
Miscellaneous Store Retailers (NAICS 453)	\$893,523	\$137,068	\$756,455	73.4	4
Florists (NAICS 4531)	\$117,395	\$16,667	\$100,728	75.1	1
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$330,941	\$34,172	\$296,769	81.3	1
Used Merchandise Stores (NAICS 4533)	\$82,832	\$25,998	\$56,834	52.2	1
Other Miscellaneous Store Retailers (NAICS 4539)	\$362,355	\$60,231	\$302,124	71.5	1
Nonstore Retailers (NAICS 454)	\$0	\$0	\$0	0.0	0
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$0	\$0	\$0	0.0	0
Vending Machine Operators (NAICS 4542)	\$0	\$0	\$0	0.0	0
Direct Selling Establishments (NAICS 4543)	\$0	\$0	\$0	0.0	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$787,807	\$76,849	\$710,958	82.2	2
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$787,807	\$43,037	\$744,770	89.6	1
Book, Periodical, and Music Stores (NAICS 4512)	\$0	\$33,812	-\$33,812	-100.0	1

Source: ESRI Business Information Solutions, 2009 Estimates and Projections, www.esribis.com

Sales leakages are normally viewed as an opportunity for unmet demand in the study area. This unmet study area demand could yield a potential to recapture lost retail dollars through creation of new local retail businesses. However, not all retail categories that exhibit leakage within a particular study area should automatically be assumed to be a good fit for that community's needs. It is also not likely that 100 percent of sales leakage in any one category would be recaptured if only there were additional local retailers of that type in Battle Mountain Study Area. Sometimes there are reasons for leakage, commuting patterns or a large retail specialty/cluster in another community that attracts Battle Mountain's Study Area residents.

Table 8 estimates the number of businesses in each retail industry sector that are located in the Battle Mountain Study Area. The industry with the highest number of businesses is the Food Services and Drinking Places Sector.

Sales Surpluses

Conversely, if the supply of retail goods sold exceeds study area demand, non-residents are assumed to be coming into the study area to spend money, creating a sales surplus. A sales surplus is shown as a negative value in Table 8. There are two reasons sales surpluses exist. First, a group of competing businesses offering a similar good or product may be located within the study area, creating a specialty cluster that draws in spending by households from outside the study area. Second, a sales surplus may indicate a saturation retail market, where supply exceeds demand.

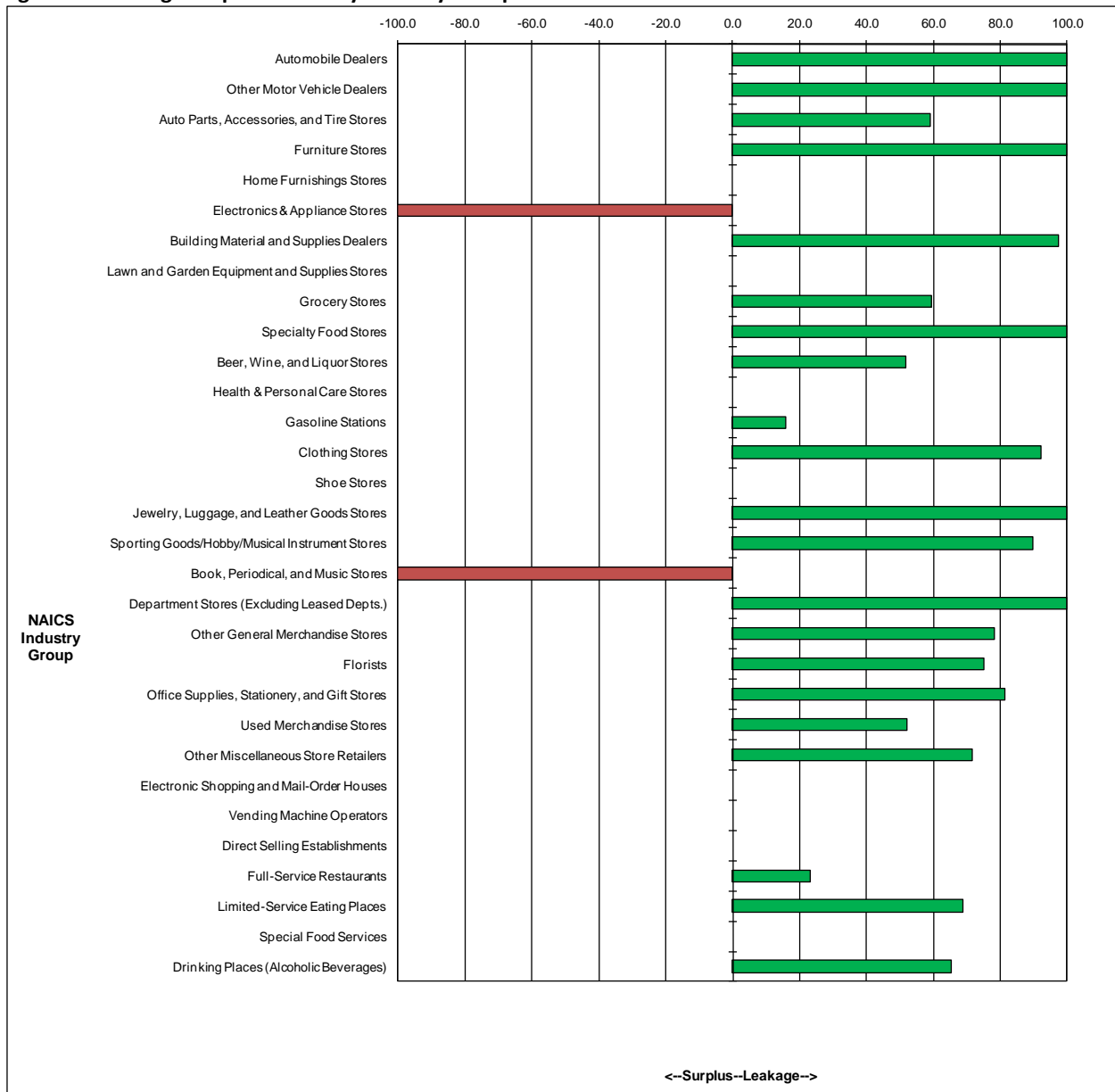
Figure 20 illustrates the surplus/leakage factor for the study area. This shows the degree to which demand for goods is being met within or outside of the study area in relation to total sales for that good. A factor of positive 100 would indicate that 100 percent of the demand is being met outside the study area boundaries. An example for the Battle Mountain Study Area would be the Furniture and Home Furnishing Stores Sector. The graph illustrates that a good portion of the retail sales for the Battle Mountain Study Area are leaking out to surrounding areas.

Retail Potential

While the previous part of this bulletin identifies the number of retail categories that are experiencing leakage, it should not be assumed that any leakage into a new business of that retail sector type will be successful in the Battle Mountain Study Area. This section identifies which of these retail categories exhibiting leakage have sufficient demand to

potentially support a new store. This analysis would provide community economic development practitioners a target retail sector that could potentially be successful.

Figure 20. Leakage Surplus Factor by Industry Group.



Using national sales average per store for different retail categories, the maximum number of stores in each retail category that could be supported if 50 percent of existing sales leakage from the Battle Mountain Study Area were recaptured by new businesses in Battle Mountain. The 50 percent recapture rate is arbitrary and can be changed for sensitivity analysis. It is likely that 100 percent surplus will not be captured so the 50 percent recapture estimate may be conservative.

Table 9 shows the results of the analysis. Categories highlighted are those with enough existing leakage that one or more stores could be supported. Food and Drinking Place Sector shows potential for three stores, while the Clothing and Clothing Accessories Store Sector shows a one store potential.

The support for Food Services and Dining Places Sector is consistent with Battle Mountain customer questionnaire. Since visitor demand, such as tourists, is not really captured by the sales leakage data, there is likely to be more spending to support these new business categories than suggested. There also may be other retail categories where one or more new businesses could be supported when the visitor market is taken into account.

Table 9. Retail Opportunity for Battle Mountain.

Industry Group	NATIONAL AVG	RETAIL GAP IN	50% RECAPTURE	# OF POTENTIAL
	SALES	BATTLE MOUNTAIN	RATE	BUSINESSES
Motor Vehicle & Parts Dealers (NAICS 441)	\$2,925,386.27	\$8,556,021	\$4,278,010.50	1.46
Automobile Dealers (NAICS 4411)	\$5,312,248.59	\$7,636,438	\$3,818,219.00	0.72
Other Motor Vehicle Dealers (NAICS 4412)	\$1,227,168.83	\$589,234	\$294,617.00	0.24
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$525,070.38	\$330,349	\$165,174.50	0.31
Furniture & Home Furnishings Stores (NAICS 442)	\$833,639.87	\$2,199,282	\$1,099,641.00	1.32
Furniture Stores (NAICS 4421)	\$1,143,612.23	\$2,199,282	\$1,099,641.00	0.96
Home Furnishings Stores (NAICS 4422)	\$595,504.21	\$0	\$0.00	0.00
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$685,128.76	-\$59,157	-\$29,578.50	0.00
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$704,415.71	\$1,497,800	\$748,900.00	1.06
Building Material and Supplies Dealers (NAICS 4441)	\$824,783.35	\$1,497,800	\$748,900.00	0.91
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$280,412.47	\$0	\$0.00	0.00
Food & Beverage Stores (NAICS 445)	\$2,370,478.77	\$4,469,514	\$2,234,757.00	0.94
Grocery Stores (NAICS 4451)	\$3,675,637.59	\$4,069,796	\$2,034,898.00	0.55
Specialty Food Stores (NAICS 4452)	\$328,353.85	\$228,728	\$114,364.00	0.35
Beer, Wine, and Liquor Stores (NAICS 4453)	\$672,987.23	\$170,990	\$85,495.00	0.13
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$877,006.48	\$0	\$0.00	0.00
Gasoline Stations (NAICS 447/NAICS 4471)	\$4,032,667.17	\$3,565,305	\$1,782,652.50	0.44
Clothing and Clothing Accessories Stores (NAICS 448)	\$542,666.84	\$1,358,102	\$679,051.00	1.25
Clothing Stores (NAICS 4481)	\$632,946.17	\$1,098,674	\$549,337.00	0.87
Shoe Stores (NAICS 4482)	\$414,768.62	\$0	\$0.00	0.00
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$333,652.15	\$259,428	\$129,714.00	0.39
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$321,303.24	\$710,958	\$355,479.00	1.11
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$219,321.58	\$744,770	\$372,385.00	1.70
Book, Periodical, and Music Stores (NAICS 4512)	\$681,062.71	-\$33,812	-\$16,906.00	0.00
General Merchandise Stores (NAICS 452)	5038999.111	\$2,616,165	\$1,308,082.50	0.26
Department Stores Excluding Leased Depts. (NAICS 4521)	6029915.361	\$1,814,846	\$907,423.00	0.15
Other General Merchandise Stores (NAICS 4529)	4388121.469	\$801,319	\$400,659.50	0.09
Miscellaneous Store Retailers (NAICS 453)	190582.6866	\$756,455	\$378,227.50	1.98
Florists (NAICS 4531)	131912.9559	\$100,728	\$50,364.00	0.38
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	230493.865	\$296,769	\$148,384.50	0.64
Used Merchandise Stores (NAICS 4533)	81303.83065	\$56,834	\$28,417.00	0.35
Other Miscellaneous Store Retailers (NAICS 4539)	238067.0046	\$302,124	\$151,062.00	0.63
Nonstore Retailers (NAICS 454)	3383324.546	\$0	\$0.00	0.00
Electronic Shopping and Mail-Order Houses (NAICS 4541)	10158533.98	\$0	\$0.00	0.00
Vending Machine Operators (NAICS 4542)	1322553.774	\$0	\$0.00	0.00
Direct Selling Establishments (NAICS 4543)	2117334.157	\$0	\$0.00	0.00
Food Services & Drinking Places (NAICS 722)	665426.8897	\$3,988,163	\$1,994,081.50	3.00
Full-Service Restaurants (NAICS 7221)	522128.7691	\$97,195	\$48,597.50	0.09
Limited-Service Eating Places (NAICS 7222)	910430.1195	\$3,349,881	\$1,674,940.50	1.84
Special Food Services (NAICS 7223)	109784.372	\$0	\$0.00	0.00
Drinking Places - Alcoholic Beverages (NAICS 7224)	460989.6903	\$541,087	\$270,543.50	0.59

Conclusion

Retail sector surplus and leakage analysis can provide Battle Mountain economic development decision-makers information as to potential retail opportunities in Battle Mountain. Sales leakages occur because Battle Mountain consumers make purchases outside the community. Knowledge of this leakage can provide information as to potential retail sectors that could exist or expand in Battle Mountain to potentially fulfill these leakages. This is advantageous to Battle Mountain because the reduction in retail leakage would mean expansion in retail businesses, additional employment, and increase in quality of life. This data and other information supplied in this study could be used as input for a Battle Mountain retail sector strategic plan.

SECTION VI

**BUSINESS DEVELOPMENT STRATEGIES
TO CAPTURE
LOCAL RETAIL SECTOR DEMANDS**

SECTION VI

BUSINESS DEVELOPMENT STRATEGIES TO CAPTURE LOCAL RETAIL SECTOR DEMAND

Overview

While a county is justifiably concerned about the aggregate package of goods and services offered, it is often a single good or service that is the initial lure that attracts customers. All the merchants in the community benefit from the key good or service. In shopping centers, that key merchant is referred to as the shopping center "anchor." When a county examines its retail trade sector, there are three types of businesses to consider (Kivell and Shaw 1980). The first type is the generative business that produces sales by itself or attracts customers to the county, such as a shopping center anchor. The second type is the shared business that secures sales from the generative power of nearby businesses; an example is a small specialty store located near a large merchandise store. The third type is the business whose sales are a coincidental occurrence to other activities. Such businesses do not generate sales themselves nor from association with nearby shops. Examples are small ice cream shops, t-shirt shops and cafes in a shopping mall. For the county to realize its retail trade potential, a balance among the different categories of retail shops must be struck.

Retail Sector Development Strategies

Concerned leaders and business persons can focus on retail sector development by forming a business assistance committee to begin implementing some of the assistance activities or working with the existing chamber of commerce. The following activities may improve the climate for business and show the community's commitment to support local business. They were developed and implemented in many other communities although not all are appropriate for any one community or county. These can be the foundation for a retail sector improvement program.

Analyze the local business sector to identify the needs and opportunities to be pursued by the program. Businesses often do not have the resources to study the economy (local, regional and national) and how they fit in. They need practical data and analysis that will help in their individual business decision making. In particular, economic analysis can identify voids in the local or regional market that can possibly be filled by expanding or by new businesses. Examples of such analysis include the retail leakage analysis and consumer surveys to identify needs and opportunities as reported in this

publication. The retail leakage analysis in this publication can be very useful to help a community identify particular businesses in which there may be significant local demand. Such an analysis can then be used to attract merchants to the area. Also, developing GIS data could provide information as to available retail space in the area. Assistance with such analyses can often be found from the local Cooperative Extension office of the University of Nevada, Reno or more detailed analyses are available from the Nevada Small Business Development Center, Bureau of Business and Economic Research and the University Center for Economic Development in Reno.

In addition to economic analysis, information is useful about business districts as a whole. For example, perhaps the appearance of buildings and vacant lots is detrimental to attracting people to the business district; perhaps poorly coordinated store hours are a hindrance; or maybe the zoning regulations are locating the businesses inconveniently with respect to the residential population. Once these needs are identified, a business development program can initiate action. A periodic survey of business needs can form the basis of a business development program work plan.

Provide management assistance and counseling to improve the efficiency and profitability of local businesses. Many local businesses are owner-operated, earn low profits and have difficulty obtaining financing. For example, a business may need help in preparing a business plan to qualify for financing to start or expand its operation. Business owners often need additional education and training in improving business management skills like accounting, finance, planning, marketing, customer relations, merchandising, personnel management, or tax procedures. This assistance can be provided through seminars and one-to-one aid. Sources of assistance include the Small Business Development Center program sponsored by the Small Business Administration and operated through the University of Nevada, vocational technical centers, Service Corps of Retired Executives (SCORE) and the Cooperative Extension service. The intent is to aid small businesses in becoming more competitive.

Assist new business start-ups and entrepreneurial activity by analyzing potential markets and local skills and matching entrepreneurs with technical and financial resources. The Nevada State Economic Development Commission and local Economic Development Authorities are often actively attempting to attract such new businesses. Establishing a business incubator is another way to assist new businesses. An incubator is a building with shared space or service requirements that reduce start-up costs for new businesses. Incubators have been successful in many locations, but are not right

for every town. A successful incubator must have long-range planning, specific goals and good management in order to identify markets and entrepreneurs.

Provide assistance in identifying and obtaining financing. Small businesses often have difficulty obtaining long-term bank financing for expansion because they lack assets to mortgage, cannot obtain affordable terms or rates, or cannot present a strong business plan. A business development program can identify public loan programs (such as Industrial Development Bonds) and package them with private loans to make projects feasible, as well as provide assistance in undertaking joint projects for the business district:

- Improving street appearance
- Improving management of retail area
- Building renovation
- Preparation of design standards
- Joint promotions and marketing
- Organizing independent merchants
- Special activities and events
- Fund raising
- Improving customer relations
- Uniform hours of operations

Undertaking these projects requires cooperation, organization and efficient management. These projects can improve a business district's competitive position and attract new customers. The Main Street program provides many good examples of towns such as Carson City or Yerington working for economic revitalization. The Main Street Program developed by the National Trust for Historic Preservation is built around the four points of organization, design, promotion, and economic restructuring.

Develop a one-stop permit center. There is a great deal of red tape involved in starting a business including registering a name; choosing a legal form; and determining what licenses, permits, or bonds are needed. In a local community this may require visits to the building department, planning department, health department, business license bureau and other local agencies. Other concerns include internal revenue service requirements, unemployment insurance, sales tax permits, and workmen's compensation insurance.

Involve active local organizations and the media. Groups such as the chamber of commerce, civic clubs, etc. can encourage a healthy business climate. The local media can also support small business and aid in developing awareness of the importance of local business.

Promote the development of home based enterprises. Home-based work by individuals is increasing because of the flexibility offered and because in some areas it may be the most realistic alternative. Home-based enterprises can include a variety of full or part-time occupations such as consulting, tele-commuting, food processing, quilting, weaving, crafts, clothing assembly, mail order processing, or assembling various goods.

Strategic Planning for Retail Sector Development in Battle Mountain

Results of Battle Mountain retail sector market analysis and analysis of purchase patterns of Battle Mountain populace show some retail sectors that could be targeted by Battle Mountain decision-makers. Both analyses indicate that general merchandise stores, new and used car dealerships, automobile supply stores, clothing and shoe stores, furniture stores, major appliance stores, and small appliance stores should be investigated for potential development or relocation. Also other retail sector services such as home health care services, child day care services, residential care services, and computer and software services should be investigated.

Given the results of this study, Battle Mountain decision-makers might consider developing a retail sector targeting committee. A targeting committee would target retail sector development programs and efforts at specific retail industries or clusters of related retail industries. A retail targeting program identifies industries for which a county offers a competitive advantage in terms of labor skills and availability, location, and availability of public services. A target approach enables community leaders to focus recruitment, retention and expansion, and small business development programs rather than attempting to provide assistance for many different types of retail sector types. This tailoring of retail sector initiatives provides three advantages for a community:

- Targeting permits clearer identification of specific retail industry requirements and needs;
- Targeting enables the community to provide (for a given budget expenditure) fewer but more highly valued programs, and
- Targeting reduces the amount of financial incentives (e.g., tax rebates or labor training programs) needed to encourage the retail industry to locate in the region.

In order to develop a successful retail sector targeting several steps are suggested:

Step 1. Develop a Retail Sector Targeting Committee

This committee should include retail sector and decision makers, i.e. county commissioners and county government employees in Lander County.

Step 2. Complete a Visioning and Goal Setting Exercise

Battle Mountain may want to complete a visioning and goal setting exercise. These goals and visions are presented in a publication titled, "Economic Vitality Strategic Plan."

Step 3. Data Gathering and Analysis of Local Retail Sector

This step will provide the retail sector targeting committee information pertaining to current Battle Mountain retail sector activity. Results of this analysis could be used by the retail sector targeting committee. The geographic information system (GIS) analysis will provide information on location of current retail sector industries in Battle Mountain. Results of the GIS analysis can be used to derive a more focused trade analysis for specific retail sectors and in specific areas of Battle Mountain.

The primary objective of this step is to provide a basis for potential impacts in Battle Mountain from targeted retail sector development. This step provides historic data and can assist in focusing retail sector goals and targets for Battle Mountain.

Step 4. Potential Project Identification

This step leads the targeting committee through a structural criteria-based process to assist in objectively choosing projects for retail sector targeting. This process would employ data collected in the previous step, the GIS analysis and fiscal impact model. This step will allow the targeting committee to set priorities for Battle Mountain retail sector development. Priorities could be short-term or long-term retail sector projects as well as delegating responsibilities.

Step 5. Review and Update of Targets

This step is long-term in nature. Hopefully the retail sector targeting committee can have a long-term existence. This would provide an annual review of targeting goals and revision of goals as changes occur in Battle Mountain.

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APPENDIX A

BATTLE MOUNTAIN

BUSINESS OWNER QUESTIONNAIRE

Cover Letter



University of Nevada
Cooperative Extension

Dear Business Owner:

Last month we sent you the **Battle Mountain Business Operators Survey**. The survey is a part of a cooperative research effort sponsored by Lander County Sustainable Development Committee. Because Battle Mountain has a “boom and bust” economy related to regional mining activity, local citizens created Project FIND to explore ways to create a more sustainable, stable economy in Battle Mountain. Sustainable economies are supported in large part by existing local business owners and operators.

The response to this survey has been quite successful as 30 percent of all Battle Mountain business owners have participated so far. However, we can most accurately describe the current entrepreneurial climate in Battle Mountain with a larger number of respondents and greater variety of business owners.

If you have not yet responded, please consider doing so today. Your participation ensures that concerns specific to your business will be considered by decision makers such as Lander County Commissioners when creating business development strategies.

The enclosed survey allows you tell us about the current entrepreneurial climate of Battle Mountain and how this entrepreneurial climate could be improved to support existing and new local entrepreneurs. Your anonymous answers will be the cornerstone in developing better entrepreneurial climate and education programs to enhance local entrepreneurship activities. The time to complete the survey is estimated to be about 35 minutes. When completing the survey you should use a **No. 2 pencil or black pen**. A postage-paid return envelope has been provided for you to mail back your survey.

- **Why should I fill out this survey?** To help us develop a plan to vitalize and encourage entrepreneurship in Battle Mountain.
- **Do I have to fill in all the questions?** The more information you provide, the more accurate and useful our analysis will be. Completing the survey is voluntary and all information is confidential.
- **How are the boundaries of Battle Mountain entrepreneurship defined?** Battle Mountain entrepreneurs are considered to be entrepreneurs who live within the city limits of Battle Mountain.
- **How do I return my survey?** A postage-paid return envelope has been provided for you to mail back your survey.
- **What is the deadline?** Please return your survey no later than Friday, June 11.

This project is a cooperative research effort sponsored by Project FIND (Future Industrial Need Discovery, Lander County Sustainable Development Committee, and funded by the Lander County Commissioners. We appreciate your time and look forward to your responses. Key findings will be reported to the public as soon as they are available via local media.

Thank you,



Thomas R. Harris
Professor and Director

Survey



University of Nevada
Cooperative Extension

Battle Mountain Business Operators Survey

1. How strongly do you agree or disagree with the following statements? (Mark ONE answer for each statement.)

	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
Local police protection is outstanding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel safe downtown, even at night	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local fire protection is outstanding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I try to buy products and services locally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I seek ways to cooperate with local businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The existing local business mix helps my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The look and feel of downtown helps my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My building façade draws customers into my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing for employees is readily available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Childcare for employees and customers is readily available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Battle Mountain has a positive image that attracts customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Battle Mountain is an excellent place to have a business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Please rate the degree to which you are experiencing the following business challenges. (Mark ONE answer for each item.)

	Major Challenge	Minor Challenge	No Challenge	Don't Know
Conflict with building owner or tenant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficulty recruiting or retaining employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive or unavailable products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive employee wages or benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expensive rent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product deliver/loading challenges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insufficient financing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insufficient parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet competition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out-of-town competition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Language barriers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor building condition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restrictive business regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shoplifting or theft	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unskilled workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vandalism/Graffiti	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loitering near business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perceived safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Generation of new customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Could you use information on or assistance with the following topics? (Mark ONE answer for each item.)

	Definitely	Probably	Unsure	Probably Not	Definitely Not
Business Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing/Branding/Advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Hiring/Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service/Hospitality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Improvements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Window Displays/Interior Store	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-Commerce/Web Design	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buying/Selling a Business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professionalism of Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If your business is NOT downtown, go to question 6

4. What are the two biggest reasons people stop downtown (i.e. specific establishment, attraction or activity)?

a. _____ b. _____

5. How useful to your downtown business are (could be) the following services? (Mark ONE answer for each item.)

	Very Useful	Useful	Useless	Don't Know
Group business training (i.e. workshops, speakers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooperative advertising coordination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing of Main Street district as shopping destination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Façade grants (if guidelines met)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Downtown public improvements projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Web site or Internet resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retail event coordination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special event coordination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Which technical or financial assistance programs* have you used for your business? (Mark ONE answer for each item.)

*Information on these programs is available at http://www.nvda.net/pdf/doing_bixnis.pdf.

	Used in Past Year	Will Use in Next Year	Don't Know About	Won't Use
Service Corps of Retired Executives (SCORE) Tech Assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Small Business Development Centers (SBDC) Tech Assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nevada Microenterprise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nevada Rural Development Corporation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Small Business Administration (SBA) Financing Programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regional/Local Revolving Loan Funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
USDA Rural Development Loans and Guarantees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Banks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Unions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Development Block Grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Who do you see as your major competition (local or out of town)?

8. What three businesses complement your business the most? (Specify up to THREE businesses.)

- a. _____
- b. _____
- c. _____

9. How satisfied are you with the present location of your business? (Mark one.)

- Very Satisfied
- Satisfied
- Neutral
- Unsatisfied
- Very Unsatisfied
- Plan to Move

Why? _____

10. Do you have plans to expand or reduce operations of your business in the next year? (Mark one.)

- I plan to expand products/services or square footage downtown.
- I plan to expand products/services or square footage at a location outside the downtown.
- I plan to reduce products/services or square footage downtown.
- I plan to reduce products/services or square footage outside of downtown.
- I don't have any plans for changes.

11. If financial assistance were available, would you consider building improvements such as façade work or new signage?

- Yes
- No
- Don't Know

12. How many years has your business (mark one in each column):

	Been in Operation?	Been at Current Location	Been Under Current Ownership?
Under 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1 to 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 to 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 to 20	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over 20	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. Does your business own or lease the space in which it is located?

- Own
- Lease
- Lease, want to purchase

14. How many square feet are devoted to your business?

_____ sq. f. Total Space

15. Where do your Customers typically park? (Mark one.)

- On the street
- In a public parking lot
- In a private parking lot

How far do CUSTOMERS typically have to park from your business? (Mark one.)

- Near entry
- ½ block away
- 1 block away
- 2 blocks away
- 3 blocks away

16. Where do you and your EMPLOYEES park? (Mark one.)

- On the street
- In a public parking lot
- In a private parking lot

How far do you and your EMPLOYEES typically have to park from your business? (Mark one.)

- Near entry
- ½ block away
- 1 block away
- 2 blocks away
- 3 blocks away

If you own a parking lot, how many parking spaces are available for EMPLOYEES (not customers)?

17. What % of your EMPLOYEES live in Battle Mountain? _____%

How many people including owners:

Are fulltime year round (32 or more hrs/wk) _____

Are part-time year round (less than 32 hrs/wk) _____

Are seasonal employees _____

18. What are the three busiest and slowest months of the year for this business? (Mark three in each column.)

	Busiest Months		Slowest Months	
	Open	Close	Open	Close
January	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
February	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
March	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
April	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
May	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
June	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
July	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
August	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
September	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
October	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
November	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
December	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. What are the hours of operation of your business?

	Busiest Months		Slowest Months	
	Open	Close	Open	Close
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

20. How many customer transactions do you do per week during (mark one in each column):

	Busiest Months		Slowest Months	
	Open	Close	Open	Close
None, all business via phone or Web	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Less than 50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
50 to 250	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
250 to 500	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over 500	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21. If additional chain stores were to open in the area, how would you adapt?

22. During an average week of the year, what are the busiest times for your business? (Mark up to FOUR times.)

	Before 11:00 am	11:00 am - 2:00 pm	2:00 pm - 5:00 pm	After 5:00 pm
Monday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. Which local events (past or present) increase sales volume for your business, either during the event or in the days that follow? (List up to five.)

- b. _____
- c. _____
- d. _____
- e. _____
- f. _____

24. How important are the following consumer segments to your business? (Mark ONE on each row.)

	Very Important	Important	Not Important	Not Sure
<u>Gender:</u>				
Males	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Females	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Age:</u>				
under 18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 to 24	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25 to 44	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
45 to 54	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
55 to 64	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over 64	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Household Income:</u>				
Low (\$0 to \$30,000)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medium (\$30,000 to \$75,000)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High (\$75,000 +)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Segment:</u>				
Residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 nd Homes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Californians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. Do the following traits help make your business more competitive? (Mark ONE answer for each item.)

	A Lot	A Little	Not at All
Your Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Brand Names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Selection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. What additional businesses would you most like to see downtown? (Mark up to FOUR in each column.)

Retail Businesses	Service Business
<input type="checkbox"/> Appliance, TV, Elec.	<input type="checkbox"/> Accounting/Tax
<input type="checkbox"/> Art Dealers	<input type="checkbox"/> Bank
<input type="checkbox"/> Bakery	<input type="checkbox"/> Bar/Grill
<input type="checkbox"/> Beer/Wine/Liquor	<input type="checkbox"/> Barber/Beauty Salons
<input type="checkbox"/> Book and News	<input type="checkbox"/> Child Day Care
<input type="checkbox"/> Building Materials	<input type="checkbox"/> Chiropractor
<input type="checkbox"/> Butcher/Meat Shop	<input type="checkbox"/> Coffee Shop
<input type="checkbox"/> Children's Clothing	<input type="checkbox"/> Coin-op Laundry
<input type="checkbox"/> Computer/Software	<input type="checkbox"/> Dentist
<input type="checkbox"/> Convenience Store	<input type="checkbox"/> Dry Cleaners
<input type="checkbox"/> Cosmetics, Beauty	<input type="checkbox"/> Fast Food Restaurant
<input type="checkbox"/> Family Clothing	<input type="checkbox"/> Fitness Center
<input type="checkbox"/> Florists	<input type="checkbox"/> Formal Wear/Costume
<input type="checkbox"/> Furniture	<input type="checkbox"/> Full Serv Restaurant
<input type="checkbox"/> General Merch (Dept)	<input type="checkbox"/> General Rental Center
<input type="checkbox"/> Gift and Souvenir	<input type="checkbox"/> Insurance
<input type="checkbox"/> Grocery	<input type="checkbox"/> Investments
<input type="checkbox"/> Health/Personal Care	<input type="checkbox"/> Lawyer
<input type="checkbox"/> Hobby/Toy/Game	<input type="checkbox"/> Mail/Copy Services
<input type="checkbox"/> Home Furnishings	<input type="checkbox"/> Movie Rental
<input type="checkbox"/> Jewelry	<input type="checkbox"/> Movie Theaters
<input type="checkbox"/> Men's Clothing	<input type="checkbox"/> Nail Salons
<input type="checkbox"/> Musical Instruments	<input type="checkbox"/> Night Club
<input type="checkbox"/> Office Supplies	<input type="checkbox"/> Optometrist
<input type="checkbox"/> Pet and Supplies	<input type="checkbox"/> Personal Care (Diet)
<input type="checkbox"/> Pharmacies and Drug	<input type="checkbox"/> Pet Care/Grooming
<input type="checkbox"/> Sewing, Needlework	<input type="checkbox"/> Photographic Services
<input type="checkbox"/> Shoe Store	<input type="checkbox"/> Physician
<input type="checkbox"/> Sporting Goods	<input type="checkbox"/> Tailor
<input type="checkbox"/> Tape, CD & Record	<input type="checkbox"/> Veterinary Services
<input type="checkbox"/> Women's Clothing	<input type="checkbox"/> Other _____
<input type="checkbox"/> Other _____	

27. Name up to three businesses you would like to see come to downtown Battle Mountain (i.e. specific name or chain).

a. _____

b. _____

c. _____

28. Which downtown buildings could be more productively used to create more economic activity for the district?

a. Location: _____

b. The space could be better used for: _____

29. What types of housing would you like to see added to downtown? (Mark ALL that apply.)

Senior units

Condo units

Loft/Studio units

Rental apartments

Single family homes

Other _____

30. Do you have a Web site? Yes No

31. If yes, what is your average monthly web traffic measured in "unique visitors"? _____

32. If no, do you plan on launching one? Yes No

33. Do you sell products or services online? Yes No

34. If yes, what percent of your sales are online? _____

35. If no, do you plan to sell products or services online? Yes No

36. Do you communicate with your customers via e-mail? Yes No

37. What percentage of your annual marketing budget is spent with each of the following media? (Total = 100%)

_____ % Newspapers	_____ % Internet
_____ % Magazines	_____ % Give-aways & donations
_____ % Radio	_____ % Referral Programs
_____ % Television	_____ % Yellow Pages
_____ % Direct Mail/Catalogs	_____ % Other: _____ (specify)
_____ % Window Displays	_____ % I don't advertise
_____ % Billboards	

38. What media has produced the best results for you?

39. What percent of your sales is spent on marketing and media? _____%

40. Thinking regionally, how much do you compete with the following shopping destinations? (Mark one answer for each.)

	A Lot	A Little	Not at All	Don't Know
Elko	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Winnemucca	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eureka	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carlin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fallon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reno/Sparks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salt Lake City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

41. What additional types of lodging accommodations are needed in Battle Mountain? (Mark ALL that apply.)

- Bed and breakfast or small inn
- Commercial chain hotel
- Other _____ (specify)

Thank you for participating in this survey. Please return your survey no later than June 25. A postage-paid return envelope has been provided. Or you may return your survey to:

**Professor Tom Harris
Resource Economics/204
University of Nevada, Reno
Reno, NV 89557-0204**

APPENDIX B

BATTLE MOUNTAIN
CONSUMER QUESTIONNAIRE

Survey Materials

Survey Cover Letter

Dear Resident,

Battle Mountain has often been characterized as a “boom and bust” economy related to the activity of the regional mining industry. Because of a cyclical economy, commercial businesses have opened and closed in Battle Mountain. Project FIND is a local economic development project to investigate how to mitigate these cycles and to focus local economic development activities into a strong and vibrant local commercial sector. We need your thoughts and assistance in gathering local consumer data to focus our retail and commercial sector activities.

The enclosed survey allows you to tell us about your shopping behaviors and describe the types of businesses you might support if they were available in Battle Mountain. Your anonymous answers will be the cornerstone of a marketing plan designed to help expand existing and attract new businesses to Battle Mountain. It will take about 20 minutes to complete the survey. A postage-paid return envelope has been provided for you to mail back your survey.

- **Why should I fill out this survey?** To help us develop a plan to revitalize the Battle Mountain retail and commercial sector based on your shopping, service and dining needs.
- **Do I have to fill in all the questions?** The more information you provide the more accurate and useful our analysis will be. Completing the survey is voluntary and all information is confidential.
- **How is the Battle Mountain retail and commercial sector defined?** The retail and commercial sector of Battle Mountain is in the confines of the Battle Mountain city limits.
- **How do I return my survey?** Please mail it in the return envelope provided. No additional postage is required.

Please return your survey as soon as possible. While there is not a specific deadline, the sooner we receive your response, the sooner the information can be reported and made useful for the Battle Mountain community.

This project is a cooperative research effort sponsored by Project FIND (Future Industrial Need Discovery), Lander County Sustainable Development Committee, and funded by the Lander County Commissioners. The study is being conducted by the University Center for Economic Development, a part of the University of Nevada, Reno’s Cooperative Extension and Resource Economics Department. We appreciate your time and look forward to your responses. Key findings will be reported to the public as soon as they are available via local media.

Thank you,

Thomas R. Harris
Professor and Director
University Center for Economic Development

Survey

The survey was mailed in a booklet format but appears here in letter format for ease of review.

***Battle Mountain,
Your Opinion Counts!***

**Project FIND
Battle Mountain Consumer Questionnaire**



University of Nevada
Cooperative Extension

A cooperative research effort sponsored by
Project FIND (Future Industrial Need Discovery),
Lander County Sustainable Development Committee, and
funded by the Lander County Economic Development Authority

1. How often do you come to Battle Mountain for the following? (Mark ONE answer for each statement.)

	5 or More Times/Wk	2 to 4 Times/Wk	Once a Week	Every Few Months	Never
Shopping, Non-Grocery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping, Grocery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eating Out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Banking/Financial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health (i.e. Doctor, Dentist)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Care (i.e. Barber)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional Services (i.e. Lawyer)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Government/Post Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment (Casino)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. During which of the following days and times do you shop? (Mark all that apply.)

	Mon.	Tues.	Wed.	Thur.	Fri.	Sat.	Sun.
8 a.m. to Noon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Noon to 6 p.m.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
After 6 p.m.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. If downtown store hours were extended, which period would appeal to you most? (Mark all that apply.)

	Mon.	Tues.	Wed.	Thur.	Fri.	Sat.	Sun.
Early morning hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekend days						<input type="checkbox"/>	<input type="checkbox"/>

4. When making purchases, what is most important to your decision? (Mark ONE reason for each type.)

	Selection	Service	Quality	Price	Hours	Ease	Other
Clothing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Furniture/Appliances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Groceries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

5. Indicate about how often you shop at the following locations. (Mark ONE for each business location.)						
	More than Once per Week	Once per Week	Every 2 Weeks	Once a Month	Every 6 Months	Rarely
Battle Mountain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Austin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Elko	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Winnemucca	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reno/Sparks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salt Lake City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. What specific store(s) draw you to the other communities?

Elko _____

Winnemucca _____

Reno/Sparks _____

7. Which THREE businesses would you patronize if they opened in Battle Mountain? (Mark up to THREE.)

- | | | |
|---|--|---|
| <input type="checkbox"/> Antiques | <input type="checkbox"/> Clothing-Vintage | <input type="checkbox"/> Hobby/Toy/Game |
| <input type="checkbox"/> Arcade/Kid's Entertainment | <input type="checkbox"/> Clothing-Women's | <input type="checkbox"/> Kitchen/Home |
| <input type="checkbox"/> Bakery | <input type="checkbox"/> Computer/Software | <input type="checkbox"/> Mailbox/Copy Center |
| <input type="checkbox"/> Books | <input type="checkbox"/> Dental Office | <input type="checkbox"/> Meats/Butcher Shop |
| <input type="checkbox"/> Bridal/Tux Rental | <input type="checkbox"/> Diet Center | <input type="checkbox"/> Pet and Pet Supply |
| <input type="checkbox"/> Camera Store | <input type="checkbox"/> Drug Store-Chain | <input type="checkbox"/> Photofinish/1 Hr Photo |
| <input type="checkbox"/> Child Care | <input type="checkbox"/> Gallery | <input type="checkbox"/> Physician Office |
| <input type="checkbox"/> Clothing-Family | <input type="checkbox"/> Gift/Souvenirs | <input type="checkbox"/> Sewing/Needlework |
| <input type="checkbox"/> Clothing-Men's | <input type="checkbox"/> Health Foods | <input type="checkbox"/> Shoe Store |
| <input type="checkbox"/> Other _____ | | |

8. Name two businesses you would like to see come to Battle Mountain (i.e. specific name or chain):

A. _____

B. _____

9. If you shop the following types of stores, please indicate if you primarily shop in the Battle Mountain area. If not, indicate why you shop elsewhere. (Mark ONE reason for each store type.)

	I Shop in Battle Mountain	I Shop ELSEWHERE because of:						Not Available in Battle Mountain	I Shop Online/ Catalogs
		Selection	Service	Quality	Price	Hours	Ease		
Department/ Discount Stores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Automotive Parts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Furniture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Furnishings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appliance/ Electronics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lawn and Garden	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grocery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pharmacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cosmetics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Optical Goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Food/ Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Women's Clothing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jewelry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sporting Goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sewing/ Needlework	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Musical Instruments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CD/Computer Games	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Florists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office Supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gifts/Souvenirs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pet and Pet Supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feed and Supply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. How often do you eat out? (Mark ONE answer for each meal.)

	5 or more times/week	2-4 times per week	Once a Week	Once a Month	Every few Months	Never
Breakfast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lunch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dinner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. How often do you eat at the following types of restaurants? (Mark ONE answer for each dining option.)

	5 or more times/week	2-4 times per week	Once a Week	Once a Month	Every few Months	Never
Full Service-Fine Dining	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Full Service-Casual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fast Food/Drive Through	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. What two types of restaurants would you like to see in downtown Battle Mountain? (Mark TWO types.)

- | | | |
|--|--|---|
| <input type="checkbox"/> Bakery | <input type="checkbox"/> Family restaurant | <input type="checkbox"/> Thai |
| <input type="checkbox"/> Banquet Room | <input type="checkbox"/> Fast food | <input type="checkbox"/> Vegetarian |
| <input type="checkbox"/> Barbecue | <input type="checkbox"/> Italian | <input type="checkbox"/> Late Night Eat/Drink |
| <input type="checkbox"/> Brew Pub | <input type="checkbox"/> Mexican | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Chinese or Japanese | <input type="checkbox"/> Pan cake | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Coffee Shop | <input type="checkbox"/> Sea food | <input type="checkbox"/> None |
| <input type="checkbox"/> Deli catesen | <input type="checkbox"/> Steakhouse | |

13. What radio station do you listen to most? (Mark ONE.)

- | | | |
|-----------------------------------|---------------------------------------|---|
| <input type="checkbox"/> KKOH 780 | <input type="checkbox"/> KSL 1160 | <input type="checkbox"/> Do Not Listen to Radio |
| <input type="checkbox"/> KBOI 670 | <input type="checkbox"/> KWNA FM 92.7 | <input type="checkbox"/> Other _____ |

14. What newspaper do you read most? (Mark ONE.)

- | | | |
|--|--|--|
| <input type="checkbox"/> Battle Mountain Bugle | <input type="checkbox"/> Humboldt Sun | <input type="checkbox"/> Do Not Read a Newspaper |
| <input type="checkbox"/> Reno Gazette Journal | <input type="checkbox"/> Elko Free Press | <input type="checkbox"/> Other _____ |

15. In which leisure activities does your household participate? (Mark top THREE.)

- | | | |
|---|---|---|
| <input type="checkbox"/> Acting/Drama | <input type="checkbox"/> Fishing | <input type="checkbox"/> Running |
| <input type="checkbox"/> Baseball/Softball | <input type="checkbox"/> Gardening | <input type="checkbox"/> Sewing/Quilting |
| <input type="checkbox"/> Basketball | <input type="checkbox"/> Golf | <input type="checkbox"/> Skiing-Cross Country |
| <input type="checkbox"/> Bi cycling | <input type="checkbox"/> Hiking | <input type="checkbox"/> Skiing-Downhill |
| <input type="checkbox"/> Boating/Jet Skiing | <input type="checkbox"/> Horseback Riding | <input type="checkbox"/> Snowmobiling/ATV |
| <input type="checkbox"/> Bowling | <input type="checkbox"/> Hunting | <input type="checkbox"/> Swimming |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Ice Skating | <input type="checkbox"/> Tennis |
| <input type="checkbox"/> Canoeing/Kayaking | <input type="checkbox"/> Motorcycling | <input type="checkbox"/> Traveling |
| <input type="checkbox"/> Collecting_____ | <input type="checkbox"/> Music-Listening to | <input type="checkbox"/> Woodworking |
| <input type="checkbox"/> Computer/Internet | <input type="checkbox"/> Music-Band/Choir | <input type="checkbox"/> Other_____ |
| <input type="checkbox"/> Cooking | <input type="checkbox"/> Painting/Drawing | <input type="checkbox"/> Other_____ |
| <input type="checkbox"/> Crafts | <input type="checkbox"/> Photography | <input type="checkbox"/> Other_____ |
| <input type="checkbox"/> Dancing | <input type="checkbox"/> Reading | <input type="checkbox"/> None of These |

16. How strongly do you agree/disagree with the following statements? (Mark ONE for each statement.)

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I always try to buy products and services locally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I like the look and feel of Battle Mountain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I prefer independent stores over chains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Independent businesses should stay open past 5 p.m.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More programs for youth should be offered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult/Senior classes should be offered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult/Senior recreation programs should be offered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Why do you live in Battle Mountain? (Mark all that apply.)

- | | | |
|--|---|--|
| <input type="checkbox"/> Community Spirit | <input type="checkbox"/> Low Housing Costs | <input type="checkbox"/> Town's Appearance |
| <input type="checkbox"/> Employment | <input type="checkbox"/> Public Services | <input type="checkbox"/> Weather |
| <input type="checkbox"/> Family Ties | <input type="checkbox"/> Recreational Opportunities | <input type="checkbox"/> Wide Open Spaces |
| <input type="checkbox"/> Friendly Atmosphere | <input type="checkbox"/> Schools | <input type="checkbox"/> Other_____ |
| <input type="checkbox"/> Location | <input type="checkbox"/> Small Town | <input type="checkbox"/> Other_____ |

18. Name another small city that you feel has a vibrant and attractive downtown:

19. Please provide any additional comments you feel would help us improve the Battle Mountain commercial sector:

Please Tell Us a Little About Yourself

What is your home zip code? _____ How many live in your household? _____

What is your age? 18 or under 18 to 24 25 to 44 45 to 64 65 and over | Gender? Male Female

|

How many children under 18 live in your household? _____

What is the highest level of formal education you have completed? (Mark ONE.)

Grade 11 or Less Some College 4 Year College Post Graduate School
 High School Associate/Tech Degree Graduate School

How would you describe your current job? (Mark ONE.)

Admin. Support Looking for Work Professional Stay-at-Home
 Construction Mgmt/Financial Retired Student
 Farm/Forestry/Fishing Mining Related Sales Transportation
 Installation/Maint. Production Services Other _____

What is your household's gross annual income after taxes (optional)? (Mark ONE.)

Under \$15,000 \$35,000 to \$49,999 \$100,000 to \$149,999
 \$15,000 to \$24,999 \$50,000 to \$74,999 \$150,000 to \$199,999
 \$25,000 to \$34,999 \$75,000 to \$99,999 Over \$200,000

Thank you for participating in this survey.

Your comments are appreciated:

Project FIND (Future Industrial Need Discovery) is a local economic development project investigating how to mitigate the “boom and bust” cycles of the Battle Mountain economy caused by the activity of the regional mining industry and how to focus local economic development activities into a strong and vibrant local commercial sector. Your thoughts and assistance in gathering local consumer data is much appreciated.

Please return your completed survey in the envelope provided or to:

University Center for Economic Development
Department of Resource Economics/204
University of Nevada, Reno
Reno, NV 895029-0204

If you have any questions concerning this survey, please contact:

Rod Davis
Extension Educator
University of Nevada Cooperative Extension
Battle Mountain Office
(775) 635-5565

or Tom Harris
Professor and Director
University Center for Economic Development
Department of Resource Economics/204
University of Nevada, Reno
(775) 784-1681

Reminder Postcard

Front:



Department of Resource Economics
University of Nevada, Reno/204
Reno, Nevada 89557-0204



«First Name» «Last Name» «Suffix»
«Address»
«City», «State» «Zip»

«ID Number»

Back:

Project FIND
Battle Mountain Consumer Questionnaire

A few weeks ago a questionnaire pertaining to consumer economic choices in Battle Mountain was mailed to you. If you have already completed the survey, please accept our sincere thanks. If not, please complete the questionnaire today. If you did not receive a questionnaire or have misplaced your copy, you can download a copy at:

<http://www.unce.unr.edu/counties/lander>

If you prefer, you may call or email us and we will have another questionnaire mailed to you immediately. To guard against duplicate or out-of-area responses a unique identifier has been provided. Responses are confidential - this number will not be used to associate your name to your responses in any way. Please record the following number on your submitted survey:

«Number»

Thank you very much for your time and cooperation.

Contact: Thomas R. Harris, Professor
Phone: (775) 784-1681
E-mail: harris@cabnr.unr.edu

APPENDIX C

**DEMOGRAPHIC AND
TRADE AREA INFORMATION**

Appendix C. Demographic and Trade Area Information:

Appendix Table 1. Battle Mountain Trade Area Demographics.

Trade Area	Primary		Secondary		Tertiary	
	Number	Percent	Number	Percent	Number	Percent
Population (2010)	4,916		5,412		25,177	
Population (2015)	4,682		5,218		25,985	
Households (2010)						
Households	1,738		1,925		8,865	
Families	1,273		1,415		6,391	
Avg. Household Size	2.81		2.77		2.79	
Households (2015)						
Households	1,658		1,859		9,155	
Families	1,210		1,362		6,569	
Avg. Household Size	2.78		2.76		2.79	
Race (2010)						
White Alone	4,116	83.7%	4,521	83.5%	20,692	82.2%
Black Alone	5	0.1%	7	0.1%	211	0.8%
American Indian Alone	208	4.2%	222	4.1%	731	2.9%
Asian Alone	17	0.3%	20	0.4%	152	0.6%
Pacific Islander Alone	2	0.0%	2	0.0%	21	0.1%
Some Other Race Alone	442	9.0%	504	9.3%	2,486	9.9%
Two or More Races	126	2.6%	136	2.5%	884	3.5%
Race (2015)						
White Alone	3,916	83.6%	4,344	83.3%	20,953	80.6%
Black Alone	5	0.1%	7	0.1%	251	1.0%
American Indian Alone	197	4.2%	213	4.1%	786	3.0%
Asian Alone	17	0.4%	21	0.4%	167	0.6%
Pacific Islander Alone	2	0.0%	2	0.0%	23	0.1%
Some Other Race Alone	422	9.0%	496	9.5%	2,809	10.8%
Two or More Races	123	2.6%	135	2.6%	996	3.8%
Hispanic Origin, Any Race (2010)	965	19.6%	1,095	20.2%	5,542	22.0%
Hispanic Origin, Any Race (2015)	926	19.8%	1,083	20.8%	6,312	24.3%
Income (2010)						
Median Household Income	\$ 47,537		\$ 57,730		\$ 58,138	
Average Household Income	\$ 48,146		\$ 59,755		\$ 64,297	
Per Capita Income	\$ 17,216		\$ 21,678		\$ 23,124	
Income (2015)						
Median Household Income	\$ 62,859		\$ 62,000		\$ 62,621	
Average Household Income	\$ 66,473		\$ 66,419		\$ 72,309	
Per Capita Income	\$ 24,096		\$ 24,162		\$ 26,010	
Housing Units (2010)						
Owner-occupied	1,334		1,481		6,519	
Renter-occupied	404		444		2,346	
Housing Units (2015)						
Owner-occupied	1,270		1,427		6,726	
Renter-occupied	388		432		2,429	

Trade Area	Primary		Secondary		Tertiary	
	Number	Percent	Number	Percent	Number	Percent
Population by Age Group (2010)						
Age 0 - 4	398	8.1%	441	8.1%	2,049	8.1%
Age 5 - 9	405	8.2%	449	8.3%	2,030	8.1%
Age 10 - 14	374	7.6%	419	7.7%	1,983	7.9%
Age 15 - 19	407	8.3%	446	8.2%	1,884	7.5%
Age 20 - 24	337	6.9%	367	6.8%	1,552	6.2%
Age 25 - 34	646	13.1%	707	13.1%	3,242	12.9%
Age 35 - 44	605	12.3%	672	12.4%	3,440	13.7%
Age 45 - 54	689	14.0%	765	14.1%	3,811	15.1%
Age 55 - 64	626	12.7%	682	12.6%	2,960	11.8%
Age 65 - 74	290	5.9%	315	5.8%	1,420	5.6%
Age 75 - 84	98	2.0%	106	2.0%	591	2.3%
Age 85+	41	0.8%	43	0.8%	215	0.9%
Population by Age Group (2015)						
Age 0 - 4	377	8.1%	424	8.1%	2,086	8.0%
Age 5 - 9	387	8.3%	434	8.3%	2,082	8.0%
Age 10 - 14	381	7.1%	425	8.1%	2,125	8.2%
Age 15 - 19	311	6.6%	354	6.8%	1,814	7.0%
Age 20 - 24	324	6.9%	356	6.8%	1,561	6.0%
Age 25 - 34	730	15.6%	797	15.3%	3,648	14.0%
Age 35 - 44	532	11.4%	599	11.5%	3,248	12.5%
Age 45 - 54	535	11.4%	609	11.7%	3,432	13.2%
Age 55 - 64	597	12.8%	663	12.7%	3,286	12.6%
Age 65 - 74	357	7.6%	393	7.5%	1,789	6.9%
Age 75 - 84	113	2.4%	123	2.4%	690	2.7%
Age 85+	38	0.8%	41	0.8%	224	0.9%
Households by Income (2010)						
< \$15,000	176	10.1%	190	9.9%	764	8.6%
\$15,000 - \$24,999	130	7.5%	144	7.5%	675	7.6%
\$25,000 - \$34,999	148	8.5%	170	8.8%	759	8.6%
\$35,000 - \$49,999	251	14.4%	282	14.6%	1,192	13.4%
\$50,000 - \$74,999	557	32.0%	632	32.8%	2,927	33.0%
\$75,000 - \$99,999	265	15.2%	278	14.4%	1,224	13.8%
\$100,000 - \$149,999	192	11.0%	205	10.6%	1,069	12.1%
\$150,000 - \$199,999	17	1.0%	18	0.9%	141	1.6%
\$200,000+	2	0.1%	6	0.3%	114	1.3%
Households by Income (2015)						
< \$15,000	127	7.7%	138	7.4%	572	6.2%
\$15,000 - \$24,999	100	6.0%	111	6.0%	542	5.9%
\$25,000 - \$34,999	117	7.1%	135	7.3%	628	6.9%
\$35,000 - \$49,999	186	11.2%	211	11.4%	908	9.9%
\$50,000 - \$74,999	565	34.1%	656	35.3%	3,231	35.3%
\$75,000 - \$99,999	265	16.0%	280	15.1%	1,298	14.2%
\$100,000 - \$149,999	270	16.3%	292	15.7%	1,588	17.3%
\$150,000 - \$199,999	26	1.6%	28	1.5%	237	2.6%

Trade Area	Primary		Secondary		Tertiary	
	Number	Percent	Number	Percent	Number	Percent
\$200,000+	2	0.1%	8	0.4%	151	1.6%
Households by Disposable Income (2010)						
< \$15,000	211	12.1%	228	11.8%	932	10.5%
\$15,000 - \$24,999	171	9.8%	193	10.0%	891	10.1%
\$25,000 - \$34,999	183	10.5%	209	10.9%	926	10.4%
\$35,000 - \$49,999	389	22.4%	439	22.8%	1,953	22.0%
\$50,000 - \$74,999	509	29.3%	559	29.0%	2,539	28.6%
\$75,000 - \$99,999	166	9.6%	176	9.1%	863	9.7%
\$100,000 - \$149,999	105	6.0%	112	5.8%	627	7.1%
\$150,000 - \$199,999	3	0.2%	5	0.3%	59	0.7%
\$200,000 +	1	0.1%	4	0.2%	75	0.8%
Total	1,738		1,925		8,865	
Median Disposable Income	\$45,645		\$45,195		\$47,175	
Average Disposable Income	\$50,272		\$50,468		\$54,766	
Households by Net Worth (2010)						
< \$15,000	453	26.1%	497	25.8%	2,049	23.1%
\$15,000 - \$34,999	143	8.2%	160	8.3%	791	8.9%
\$35,000 - \$49,999	108	6.2%	119	6.2%	535	6.0%
\$50,000 - \$74,999	195	11.2%	217	11.3%	884	10.0%
\$75,000 - \$99,999	109	6.3%	122	6.3%	599	6.8%
\$100,000 - \$149,999	169	9.7%	193	10.0%	939	10.6%
\$150,000 - \$249,999	250	14.4%	273	14.2%	1,237	14.0%
\$250,000 - \$499,999	211	12.1%	226	11.7%	1,017	11.5%
\$500,000 - \$999,999	81	4.7%	84	4.4%	458	5.2%
\$1,000,000 +	19	1.1%	34	1.8%	356	4.0%
Total	1,738		1,925		8,865	
Median Net Worth	\$70,058		\$70,465		\$81,189	

Source: ESRI Business Information Solutions, 2009 Estimates and Projections, www.esribis.com

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Appendix Table 2. Profile of Households by Type of Neighborhood Battle Mountain Trade Areas.

Trade Area	Primary 0-5 min		Secondary 5-15 min		Tertiary 15-30 min	
Households (2010)	1,738	100.0%	1,925	100.0%	8,865	100.0%
Group 1: High Society					737	8.3%
1A Top Rung						
1B Suburban Splendor						
1C Connoisseurs						
1D Boomburbs						
1E Wealthy Seaboard Suburbs						
1F Sophisticated Squires					737	8.3%
1G Exurbanites						
Group 2: Upscale Avenues					268	3.0%
2A Urban Chic						
2B Pleasant-Ville						
2C Pacific Heights						
2D In Style						
2E Enterprising Professionals						
2F Green Acres					268	3.0%
2G Cozy and Comfortable						
Group 3: Metropolis						
3A City Lights						
3B Metropolitans						
3C City Strivers						
3D Metro City Edge						
3E Urban Rows						
3F Modest Income Homes						
Group 4: Solo Acts						
4A Laptops and Lattes						
4B Trendsetters						
4C Metro Renters						
4D Old and Newcomers						
4E Young and Restless						
Group 5: Senior Styles						
5A Prosperous Empty Nesters						
5B Silver and Gold						
5C Rustbelt Retirees						
5D Retirement Communities						
5E The Elders						
5F Senior Sun Seekers						
5G Heartland Communities						
5H Simple Living						
5I Social Security Set						
Group 6: Scholars & Patriots						
6A Military Proximity						
6B College Towns						
6C Dorms to Diplomas						

Trade Area	Primary 0-5 min		Secondary 5-15 min		Tertiary 15-30 min	
Group 7: High Hopes					718	8.1%
7A Aspiring Young Families					420	4.7%
7B Great Expectations					298	3.4%
Group 8: Global Roots						
8A International Marketplace						
8B Industrious Urban Fringe						
8C Urban Melting Pot						
8D Las Casas						
8E Inner City Tenants						
8F NeWest Residents						
8G City Dimensions						
8H High Rise Renters						
Group 9: Family Portrait	622	35.8%	622	32.3%	622	32.3%
9A Up and Coming Families						
9B Milk and Cookies	622	35.8%	622	32.3%	622	32.3%
9C Urban Villages						
9D Southwestern Families						
9E City Commons						
Group 10: Traditional Living					671	7.6%
10A Main Street, USA					671	7.6%
10B Rustbelt Traditions						
10C Midlife Junction						
10D Family Foundations						
Group 11: Factories & Farms					4	0.0%
11A Salt of the Earth						
11B Prairie Living					4	0.0%
11C Southern Satellites						
11D Home Town						
11E Rural Bypasses						
Group 12: American Quilt	1,116	64.2%	1,303	67.7%	5,845	65.9%
12A Midland Crowd	452	26.0%	639	33.2%	3,787	42.7%
12B Rural Resort Dwellers					189	2.1%
12C Crossroads	664	38.2%	664	34.5%	1,869	21.1%
12D Rooted Rural						

Source: ESRI Business Information Solutions, 2009 Estimates and Projections,
www.esribis.com

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Primary: Neighborhoods within 5 minutes drive of center

There are three neighborhood types that contain 1,738 households in the primary zone of the Battle Mountain trade area.

- 35.8 percent of the households live in neighborhoods that are:

Consumer type 9B: Milk and Cookies

Demographic: Upscale living on a family allowance, *Milk and Cookies* represents young, affluent married couples who are starting their families or already have young children. The median age of 33.7 years represents the presence of kids; nearly half of the households include children. One in four householders is between the ages of 45 and 54. The population diversity is comparable to that of the U.S., and the proportions of the population by race approximate the U.S. distributions with slightly above-average ratios of black and Hispanic residents.

Socioeconomic: Ninety percent of *Milk and Cookies* households earn income from wages. The labor force participation rate of 71 percent is above average. The median household income is \$64,527, and the median net worth is \$135,891. Fifty-eight percent have attended college; more than 20 percent hold bachelor's or graduate degrees.

Residential: *Milk and Cookies* residents prefer single-family homes in suburban neighborhoods of cities, largely in the South, particularly in Texas. Smaller concentrations of households are located in the West and Midwest. The median home value is \$132,494. Housing units are generally 20–30 years old. Given the concentration of dual-income families, 71 percent of households have at least two vehicles. A family with two or more workers, more than one child, and two or more vehicles is the norm for these neighborhoods.

Preferences: As *Milk and Cookies* residents settle into their family oriented lifestyle, they focus on family and the future. They are properly insured, carrying life and accidental death and dismemberment policies. They use a credit union, have overdraft protection, and usually have a new car loan. Although they may still own a motorcycle or small car, they prefer larger vehicles. When they move, they rent a U-Haul and move their own belongings. Many households own a dog. The presence of children in *Milk and Cookies* households drives their large purchases of baby and children's products including baby food, baby equipment, clothes, shoes, medicine, vitamins, board games, bicycles, toys, video games, and children's DVDs. Most households own one of the latest video game systems and a large-screen TV. To save time in their busy lives, they frequently buy prepared dinners from the grocery store and fast food. They play video games, go bowling, and visit theme parks such as Six Flags and Sea World. They watch professional football and basketball games. Favorite cable channels include Cartoon Network, Discovery Channel, National Geographic Channel, and BET. They also work on their lawns, tackle interior painting projects, or do minor maintenance on their vehicles.

- 26.0 percent of the households live in neighborhoods that are:

Consumer Type 12A: Midland Crowd

Demographic: The growing population of 12 million, approximately 4 percent of the U.S. population, identifies Midland Crowd as Tapestry's largest segment. Since 2000, the population has grown by 2.4 percent annually. The median age of 37 years parallels that of the U.S. median. Sixty-two percent of the households are married couple families; half of them have children. Twenty percent of the households are singles who live alone. Midland Crowd neighborhoods are not diverse.

Socioeconomic: Median household income is \$50,518, slightly lower than the U.S. median. Most income is earned from wages and salaries; however, self-employment ventures are slightly higher for this segment than the national average. The median net worth is \$89,749. Unemployment is below average. Half of the residents who work hold white collar jobs. More than 45 percent of the residents aged 25 years and older have attended college; 16 percent have earned a bachelor's or graduate degree.

Residential: Midland Crowd residents live in housing developments in rural villages and towns throughout the U.S., mainly in the South. Three-fourths of the housing was built after 1969. The homeownership rate is 82 percent, higher than the national rate of 66 percent. The median home value is \$124,088. Two-thirds of the housing is single-family houses; 28 percent are mobile homes.

Preferences: These politically active, conservative residents vote, work for their candidates, and serve on local committees. Their rural location and traditional lifestyle dictate their product preferences. A fourth of the households own three or more vehicles; they typically own or lease a truck, and many own a motorcycle. Proficient do-it-yourselfers, they work on their vehicles, homes, and gardens and keep everything in tip-top shape. They hunt, fish, and do woodworking. Dogs are their favorite pets. They patronize local stores or shop by mail order. They have recently bought radial tires. They often go to the drive-through at a fast-food restaurant. Many households own a satellite dish so they can watch CMT, the Speed Channel, Home & Garden Television, NASCAR racing, rodeo/bull riding, truck and tractor pulls, fishing programs, and a variety of news programs. They listen to country music on the radio and read fishing and hunting magazines.

- 38.2 percent of the households live in neighborhoods that are:

Consumer Type 12C: Crossroads

Demographic: Crossroads neighborhoods are growing communities in small towns in the South, Midwest, and West. Married couples with and without children and single parents are the primary household types in these areas. Younger than the U.S. average, they have a median age of 32.1 years; nearly half are younger than 45. This population is growing at 1.6 percent annually, faster than the growth of the U.S. population. One in five is Hispanic, a higher proportion than the U.S.

Socioeconomic: The median household income is \$44,410, somewhat below the U.S. median; the median net worth is \$53,300. Educational attainment is lower than the U.S. average; 37 percent of residents aged 25 years or older have attended college, compared to 54 percent for the U.S. Most employed residents work in the manufacturing, retail, construction, and service industries. Labor force participation is comparable to the U.S. level; unemployment is slightly higher.

Residential: Affordable housing in these small-town communities provides opportunities for young families to own their homes. Homeownership is 74 percent; the median home value is \$62,469, much lower than the U.S. median. More than half of the housing is mobile homes; 36 percent are single-family dwellings. Most were built after 1969.

Preferences: Mindful of their expenses, Crossroads households budget for what they buy and choose selectively where to spend their money. They shop at discount department stores such as Wal-Mart and Kmart. Many shop for groceries at Wal-Mart Supercenters. Their priorities are their families and their cars. Children are the focus of their lives, and they buy children's products in addition to groceries. They drive domestic cars and trucks and handle the maintenance themselves. Investing and saving for retirement are a low priority; many households do not own mutual funds, stocks, or retirement savings accounts. Home improvement projects also rank low. They watch NASCAR racing and other sports on TV. Typically, they own a satellite dish or subscribe to cable. They also like to listen to the radio, preferring country and contemporary hit music to other formats. They read the newspaper less frequently than average U.S. households; however, they read

magazines, especially automotive, boating, motorcycle, and fishing publications. They go fishing and watch movies on DVD.

Secondary: Neighborhoods between 5 and 15 minutes drive of center

The secondary trade area of Battle Mountain is comprised of 1,925 households.

- 32.3 percent of the households live in neighborhoods that are:

Consumer type 9B: Milk and Cookies

See description above.

- 33.2 percent of the households live in neighborhoods that are:

Consumer type 12A: Midland Crowd

See description above.

- 34.5 percent of the households live in neighborhoods that are:

Consumer type 12C: Crossroads

See description above.

Tertiary: Neighborhoods between 15 and 30 minutes drive of center

The tertiary trade area of Battle Mountain is comprised of 8,865 households.

- 8.3 percent of the households live in neighborhoods that are:

Consumer type 1F: Sophisticated Squires

Demographic: Residents of Sophisticated Squires neighborhoods enjoy cultured country life on the urban fringe. These city escapees accept longer commutes to live near fewer neighbors. Mostly married couple families; more than 40 percent of the households are married couples with children that range from toddlers to young adults. The median age is 38.2 years. Most are baby boomers and are aged between 35 and 54 years. This segment is not ethnically diverse; most residents are white.

Socioeconomic: These residents are educated; more than one-third of the population aged 25 years or older holds a bachelor's or graduate degree; another third has attended college. Labor force participation rates are high; occupations range from management to unskilled labor positions. Most work in white-collar jobs. The median household income is \$86,075. Nearly 90 percent of the households earn wage or salary income; nearly half supplement their wages and salaries with interest, dividends, or rental income. The median net worth is \$298,660.

Residential: Sophisticated Squires live in less densely populated areas concentrated along the Atlantic coast and around the Great Lakes. Approximately 90 percent of the housing is single-family homes; the median home value is \$237,607. Seventy-four percent of the housing was built before 1990; 55 percent was built between 1970 and 1989. More than 80 percent of the households own at least two vehicles. They prefer compact SUVs; however, many drive minivans or full-size SUVs.

Preferences: Do-it-yourselfers, Sophisticated Squires residents take care of their lawns and landscaping; home improvements; and remodeling projects such as bathroom remodeling, installing

new light fixtures, painting home interiors, staining decks, and cleaning carpets with their steam cleaners. They like to barbecue on their gas grills and make bread with their bread making machines. Many households own a motorcycle. A typical household will own three or more cell phones. Looking toward the future, many residents own stocks, bonds, and large life insurance policies. When dieting, they go on Weight Watchers; many own a treadmill or stationary bike to stay fit. They go power boating, play board and word games, do woodworking projects, and attend football and baseball games. Adults also take photos, play golf, and ride their motorcycles. Children play games on the home personal computer and typically own a video game system. Residents listen to soft adult contemporary music; classic hits; news; all-talk; and sports radio, including broadcasts of professional games. Although many households have four or more TVs, residents watch as much television as typical U.S. households. Favorite programs include news, comedies, dramas, and programs on Home & Garden Television.

- 3.0 percent of the households live in neighborhoods that are:

Consumer type 2F: Green Acres

Demographic: Seventy-one percent of the households in *Green Acres* neighborhoods are married couples with and without children. Many families are blue-collar Baby Boomers, many with children aged 6–17 years. With more than 10 million people, *Green Acres* represents Tapestry’s third largest segment, currently more than 3 percent of the U.S. population and growing by 2.2 percent annually. The median age is 40.7 years. This segment is not ethnically diverse; 92 percent of the residents are white.

Socioeconomic: Educated and hard-working, more than one-fourth of *Green Acres* residents hold a bachelor’s or graduate degree; more than half have attended college. Labor force participation is 68 percent, with higher employment concentrations in the manufacturing, construction, healthcare, and retail trade industry sectors. Occupation distributions are similar to those of the U.S. Seventeen percent of the households earn income from self-employment ventures. The median household income is \$64,480; the median net worth is \$177,629.

Residential: Although *Green Acres* neighborhoods are located throughout the country, they are found primarily in the Midwest and South, with the highest concentrations in Michigan, Ohio, and Pennsylvania. A “little bit country,” these residents live in pastoral settings of developing suburban fringe areas. Homeownership is at 86 percent, and median home value is \$181,705. Typical of rural residents, *Green Acres* households own multiple vehicles; 78 percent own two or more vehicles.

Preferences: Country living describes the lifestyle of *Green Acres* residents. Pet dogs or cats are considered part of the family. These do-it-yourselfers maintain and remodel their homes; projects include roofing and installing carpet or insulation. They own all the necessary power tools, including routers, welders, sanders, and various saws, to finish their projects. Residents also have the right tools to maintain their lawns, flower gardens, and vegetable gardens. They own riding lawn mowers, garden tillers, tractors, and even separate home freezers for the harvest. Continuing the do-it-yourself mode, it is not surprising that *Green Acres* is the top market for owning a sewing machine. A favorite pastime is using their ice cream maker to produce homemade ice cream. They prefer motorcycles and full-size pickup trucks. For exercise, *Green Acres* residents ride their mountain bikes and go fishing, canoeing, and kayaking. They also ride horses and go power boating, bird watching, target shooting, hunting, motorcycling, and bowling. They listen to auto racing and country music on the radio and read fishing and hunting magazines. Many own satellite dishes so they can watch news programs, the Speed Channel, and auto racing on TV. A favorite channel is Country Music Television.

- 4.7 percent of the households live in neighborhoods that are:

Consumer type 7A: Aspiring Young Families

Demographic: Most of the residents in these neighborhoods are young, startup families, married couples with or without children, and single parents. The average family size of 3.1 people matches the U.S. average. Approximately two-thirds of the households are families, 27 percent are single person, and 9 percent are shared. Annual population growth is 1.3 percent, higher than the U.S. figure. The median age is 30.4 years; nearly 20 percent of the residents are in their 20s. Typical of younger populations, Aspiring Young Families residents are more ethnically diverse than the total U.S. population.

Socioeconomic: The median household income is \$52,036; wages provide the primary source of income. The median net worth is \$37,712. Approximately 60 percent of employed residents work in professional, management, sales, or office/administrative support positions. Overall, 87 percent of residents aged 25 years and older have graduated from high school, 58 percent have attended college, and 24 percent hold a bachelor's or graduate degree.

Residential: In large, growing southern and western metropolitan areas, the highest concentrations of these neighborhoods are found in California, Florida, and Texas. Twenty percent are located in the Midwest. Tenure is nearly even; 51 percent of the households rent; 49 percent own their homes. Residents live in moderately priced apartments, single-family houses, and startup townhouses. Most of the housing was built after 1969. The average gross rent is comparable to the U.S. average. The median home value is \$141,309.

Preferences: Focused on family and home, residents of Aspiring Young Families communities spend most of their discretionary income for baby and children's products, toys, home furnishings, cameras, and video game systems. They go online to look for jobs, play games, and buy personal preference items such as music and computer equipment. These residents would probably go to a theme park while on vacation. They play video games, watch TV, eat out, and go to the movies. They also play basketball and go bowling and biking. They listen to urban stations and professional basketball games on the radio and watch sports, news, entertainment, and courtroom shows on TV. They eat out at family restaurants such as Chili's or IHOP and go to Jack in the Box or Sonic for fast food.

- 3.4 percent of the households live in neighborhoods that are:

Consumer type 7B: Great Expectations

Demographic: Young singles who live alone and married-couple families dominate the Great Expectations market, although all household types are represented. The median age is 33.2 years. Some residents are just beginning their careers or family lives. Compared to the U.S. figures, this segment has a higher proportion of residents who are in their 20s and a higher proportion of householders younger than 35 years. The ethnic diversity and racial composition of this segment are similar to U.S. levels.

Socioeconomic: The median household income of \$38,790 and the median net worth of \$20,643 are lower than the U.S. values. Nearly half of the population aged 25 years and older has some postsecondary education; 18 percent hold a bachelor's or graduate degree. Labor force participation rate is 68 percent; most of the jobs come from the manufacturing, retail, and service industry sectors.

Residential: Great Expectations neighborhoods are located throughout the country, with higher proportions in the Midwest and South. Half own their homes; half rent. More than half of the households are single-family dwellings; approximately 40 percent are apartments in low- or mid-rise

buildings. The median home value is \$102,241. Most of the housing units in these older suburban neighborhoods were built before 1960.

Preferences: Great Expectations homeowners are not afraid to tackle smaller maintenance and remodeling projects, but they also enjoy a young and active lifestyle. They go out to dinner and to the movies. They do most of their grocery shopping at Walmart Supercenters, Aldi, and Shop 'n Save. They throw Frisbees; play softball and pool; go canoeing; watch horror, science fiction, and drama films on DVD; and listen to country music, classic rock, and sports on the radio. They watch dramas, auto racing, and the evening news on TV. They occasionally eat at Arby's and Dairy Queen. They shop at major discount and department stores. They rarely travel. Focused on starting their careers, they're not investing for their retirement years.

- 32.2 percent of the households live in neighborhoods that are:

Consumer type 9B: Milk and Cookies

See description above.

- 7.6 percent of the households live in neighborhoods that are:

Consumer type 10A: Main Street, USA

Demographic: *Main Street, USA* neighborhoods are a mix of household types, similar to the U.S. distribution. Approximately half of the households are composed of married-couple families, nearly one-third are single-person or shared households, and the rest are single-parent or other family households. The median age of 36.7 years matches the U.S. median. These residents are less diverse than the U.S. population.

Socioeconomic: The median household income is \$57,082, derived from wages, interest, dividends, or rental property. Their median net worth is \$86,618. More than one in five residents aged 25 years and older hold a bachelor's or graduate degree; half of the residents have attended college. Occupation and industry distributions are similar to those of the U.S.

Residential: A mix of single-family homes and multiunit buildings, these neighborhoods are located in the suburbs of smaller cities in the Northeast, West, and Midwest. Nearly two-thirds of the housing was built before 1970. The homeownership rate is 63; the median home value is \$181,600.

Preferences: Family-oriented and frugal, these residents may occasionally go to the movies or eat out at a family restaurant, such as Friendly's or Red Robin, but are most likely to stay home and watch a rental movie or play games with their children. They own pet cats. They play baseball and basketball and go swimming. They listen to classic hits and rock radio and watch cartoons and courtroom shows on TV. They go to the beach and theme parks or take domestic vacations to visit with family or see national parks. They go online periodically to look for jobs, research real estate, and play games and are beginning to shop online. Those who do not have Internet access at home will go online at school or the public library. They use the Yellow Pages to find veterinarians or stores. They will invest in small home improvement and remodeling projects, usually doing the work themselves instead of hiring a contractor. They buy the tools and supplies for these projects from Home Depot or Ace Hardware. They keep up their lawns and gardens by planting bulbs, fertilizing, and applying lawn care products regularly.

- 0.0 percent of the households live in neighborhoods that are:

Consumer type 11C: Southern Satellites

Demographic: Found primarily in the rural South, Southern Satellites households consist of married

couples with and without children; 22 percent are singles. The median age of 38.1 years is near the U.S. median of 36.9. This segment has low diversity; 87 percent of the residents are white.

Socioeconomic: The median household income is \$39,969; the median net worth is \$52,475. Sixty percent participate in the labor force, slightly below the U.S. percentage. Most households earn income from wages and salaries; 28 percent receive Social Security benefits. The manufacturing and service industry sectors provide most of their jobs. Educational attainment is lower than the national level; 16 percent of residents aged 25 years and older have not graduated from high school.

Residential: Eighty percent of these households are in the South. Primary housing types in these neighborhoods are newer single-family dwellings for two-thirds of the households; 30 percent live in mobile homes. The homeownership rate is 81 percent; the median home value is \$87,166. Nearly two-thirds of the housing was built after 1969. Vacancy rates are slightly above average.

Preferences: These rural residents enjoy country life. Fishing and hunting are two favorite leisure activities, and Southern Satellites residents spend money for magazines, clothes, and gear related to these interests. Because cable is not always available, many residents own satellite dishes. Many own pets. They work in their vegetable gardens and might own equipment such as riding mowers and tillers to help with outdoor chores. Most households have two or more vehicles to meet their transportation needs; they prefer domestic cars, and many drive trucks. They consider themselves to be politically conservative. They read newspapers and magazines infrequently; however, they listen to country radio and watch fishing programs, NASCAR racing, and country music programs on TV. Owning personal computers and going online from home isn't important to these residents.

- 42.7 percent of the households live in neighborhoods that are:

Consumer type 12A: Midland Crowd

See description above.

- 2.1 percent of the households live in neighborhoods that are:

Consumer type 12B: Rural Resort Dwellers

Demographic: These neighborhoods are found in pastoral settings in rural nonfarm areas throughout the U.S. Household types include empty-nester married couples, singles, and married couples with children. The median age is 47.2 years; more than half are aged 55 and older. Most residents are white in these low diversity neighborhoods.

Socioeconomic: Although retirement beckons, most of these residents still work. The median household income is \$48,105, slightly below the U.S. level. Six percent of those who are employed work at home, twice the U.S. rate. Because so many residents are aged 65 and older, receipt of retirement income and Social Security benefits is common. More than two-fifths collect investment income; approximately 20 percent receive self-employment income. Nearly one in four residents aged 25 years and older holds a bachelor's or graduate degree; half of the residents have attended college. The median net worth is \$111,790, slightly below the U.S. median.

Residential: The number of households in these small, low-density neighborhoods is growing at 2.1 percent annually. Seventy-eight percent of the housing is single-family structures; 15 percent is mobile homes. Homeownership is at 81 percent; the median home value is \$189,032. Of the Tapestry segments, *Rural Resort Dwellers* has the highest percentage of seasonal housing, 16 times higher than the national level.

Preferences: These residents live modestly and have simple tastes. They often work on home improvement and remodeling projects and own garden equipment to maintain their yards. They cook and bake at home. Many households own multiple pets, particularly dogs and cats. Riding

lawn mowers and satellite dishes are familiar sights in these areas, along with multiple vehicles, including a truck. Active participants in local civic issues, residents also belong to environmental groups, church and charitable organizations, fraternal orders, unions, and veterans' clubs. They go hiking, boating, canoeing, hunting, fishing, horseback riding, and golfing. They listen to country radio and watch Animal Planet, CMT, BBC America, the National Geographic Channel, and primetime dramas on TV. The older residents focus on their general health care, prescription medications, and financial and retirement-related matters. Many residents actively manage or plan their investments and retirement savings. The self-employed residents are more likely to have IRAs than 401(k) plans.

- 21.1 percent of the households live in neighborhoods that are:

Consumer type 12C: Crossroads

See description above.