

Retail Sales Analysis & Report for Wright County, Iowa Fiscal Year 2008







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INTRODUCTION

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

Real taxable retail sales in Iowa did not grow between 2000 and 2008 and real per capita sales have declined by nearly 4%. It is important to note that these are **taxable sales** and not total retail sales. Because much of consumer spending is in tax exempt areas such as energy and food, these retail measures do not indicate the total level of consumer spending but provide a good first approximation.

The general trend in Iowa has been a decline in the retail health of small towns and rural communities, and more recently a trend towards consolidation of retail trade in suburbs and ancillary cities at the expense of metro areas and rural areas. The pull factor changes over time support what we observe in Iowa, the growth of trade centers and population centers at the expense of smaller towns and rural areas. This trend will force some communities to view retail health differently and look for innovative approaches for growth.

With the economy in recession this year the retail data points to symptoms of fundamental changes in our economic structure. Despite the years 2000 and 2008 bookending record setting consumer spending expansion nationally, Iowa's sales when adjusted for inflation showed no growth. This correlates with recent data from the Federal Reserve suggesting that as a whole, the United States has not seen increases in real net income or net worth since 2001. Since real wealth did not fuel the increase in consumption across the country, that necessarily means it was prompted by paper wealth increases due to home appreciation and financed with consumer debt. This means that the economy, particularly the retail sector, finds itself in bubble that requires strong correction. While Iowa may not have had the levels of housing speculation found in some areas, it did experience some and is not immune from the national trends. In our metro areas, where speculative home building did occur the tendency was for speculative retail and commercial space to locate close by new developments to benefit from economies of agglomeration. This necessarily must contribute to the severity of the correction. As consumers pull back on spending, the number of retail establishments must decline and consequently the demand for retail space will fall. With considerable excess capacity already in existence this will exacerbate the decline in the sale prices for retail and commercial space as well as the rents they can command. The adjustment to the retail sector, even here in Iowa, will be dramatic and prolonged and has myriad implications for tax revenues, planning and zoning, and nearly every aspect of community economic development. In the next few years the retail trade reports will likely bear evidence that we are losing retail businesses, experiencing declines in taxable retail sales, and are witnessing a fundamental shift in the appearance of our retail landscape. As the data will demonstrate, this correction will be lumpy in its distribution meaning that some communities will bear a disproportionate share of the burden. For those communities that do still see some increases in retail sales during the recession the increases will be due to the trends toward retail consolidation in evidence for the last decade. However, even those communities that experience an increase are experiencing a loss in terms of sales growth that may have been attainable. In conclusion, the distribution of the correction may not be evenly distributed but no community will be immune.

DATA SOURCES & NOTES

Retail Data and Time Period:

The retail sales data presented here are obtained in the *Iowa Retail Sales and Use Tax Report* generated by the Iowa Department of Revenue. The Department of Revenue compiles data from quarterly state sales tax returns, and reports data for all localities with at least 10 businesses holding sales tax permits. The number of firms is annualized from this data based on the quarterly numbers, and firms are classified based on their Standard Industrial Classification (S.I.C.) codes. The data are collected primarily for statewide fiscal management purposes and due to the administrative nature of sales tax reporting and accounting, may exhibit occasional anomalies for analysis at the local level. For cities with population over 2,500 the report also details sales by broad merchandise categories such as building materials, food, apparel, etc. For cities with population below 1,000 retail data may not be reported for all years, and may be represented with zeroes in the report.

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

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

Other Data Sources:

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

www.bea.gov

www.census.gov

www.ers.usda.gov

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

DEFINITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Utility Effect: Refers to the exaggeration of retail sales data for counties which have a utility provider and also the large and abrupt changes to retail sales data for an area if these utility companies change billing operations or locations. Additionally, due to the sales tax on utilities being phased out over a five year period, sales data for these counties will experience volatility. Beginning in 2006 the sales tax rate dropped to zero for the selected energy categories. More information can be found at the Iowa Department of Revenue website.

METHODOLOGY

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

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

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

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

Inflation Concerns: The sales data in this report are obtained from the Iowa Department of Revenue and reports sales without adjusting for inflation, in other words they are the actual level of sales in dollars. The actual dollar value of sales published is reported here as **Nominal Dollar Sales**, in reports prior to 2005 these figures were referred to as current dollar sales. **Real Dollar Sales** are the nominal dollar sales adjusted for inflation using the Implicit Price Deflator (IPD) for Personal Consumption Expenditures published by the BEA. In previous reports sales were deflated using the CPI, however the IPD serves as a better measure as it focuses on the average increase in prices for all consumption and accounts for changes in consumer tastes. Real sales figures are typically expressed in 2008 dollars.

COUNTY PEER GROUP DETAIL

GROUP A: 10 COUNTIES

Total Population this group: 1,466,095

Blackhawk	Polk
Dallas	Pottawattamie
Dubuque	Scott
Johnson	Story
Linn	Woodbury

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

Average per capita income: \$34,873

Average population growth 2000-2008: 10.87%

Average 2008 county population: 146,610

Median daytime population change: 4.2%

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

GROUP B: 24 COUNTIES

Total Population this group: 690,527

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

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

Average per capita income: \$31,090

Average population growth 2000-2008: .81%

Average 2008 county population: 28,772

Median daytime population change: -3.8%

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GROUP C: 45 COUNTIES

Total Population this group: 654,690

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

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

Average per capita income: \$28,068

Average population growth 2000-2008: -2.95%

Average 2008 county population: 14,549

Median daytime population change: -4.3%

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

GROUP D: 20 COUNTIES

Total Population this group: 176,734

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

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

Average per capita income: \$25,465

Average population growth 2000-2008: -5.74%

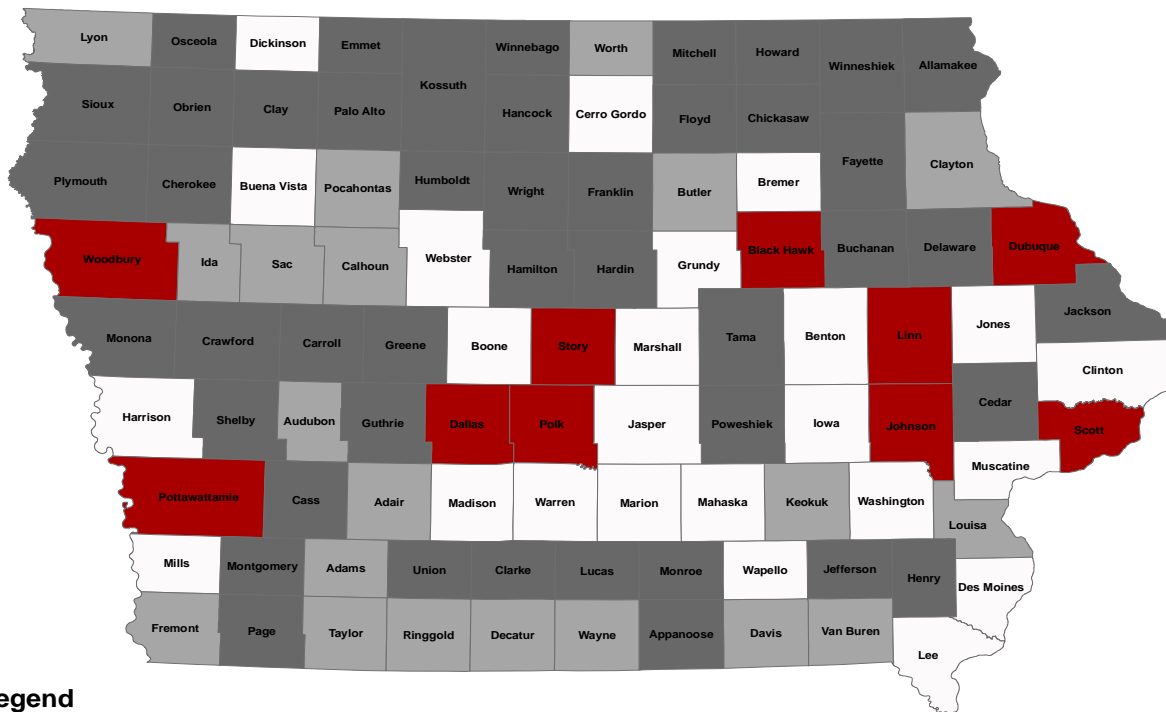
Average 2008 county population: 8,837

Median daytime population change: -9.4%

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

Map of Iowa's 99 Counties Coded by Trade Classification

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



Legend

Counties

Trade Classification

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

Wright County is assigned to Peer Group C.

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The Iowa Department of Revenue reports the number of filers by the category of business as well as the gross sales of the business and the population of the community. Figure A illustrates that the majority of retailers in Iowa have gross sales of \$25,000 representing 61% of our sales tax filers. Only 20% of our sales tax filers report gross sales in excess of 100,000. Figure B shows that the majority of trade is consolidated in our population centers with 41% of the sales tax receipts attributed to only 10 of Iowa's communities. Of the approximately 450 Iowa communities with populations greater than 500, roughly 67% of the sales tax is generated by only 8% of those communities. This has important implications for Iowa's fiscal landscape and for the interrelatedness of the health of our respective economies.

Figure A: Total Returns Filed Classified by Sales Size Class

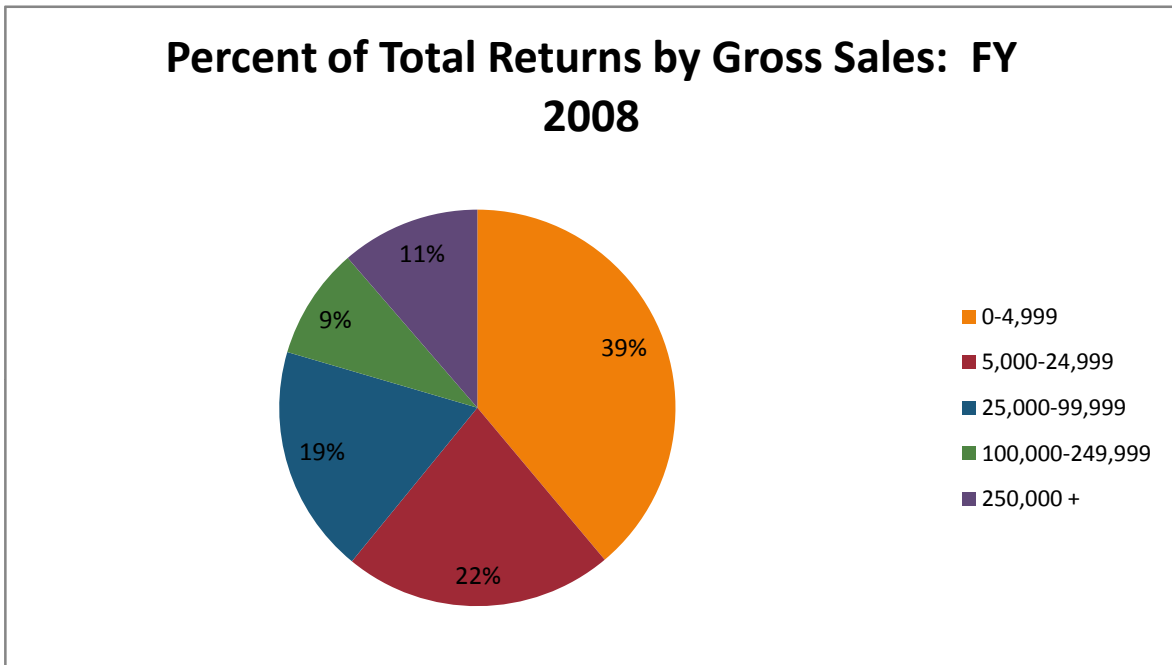
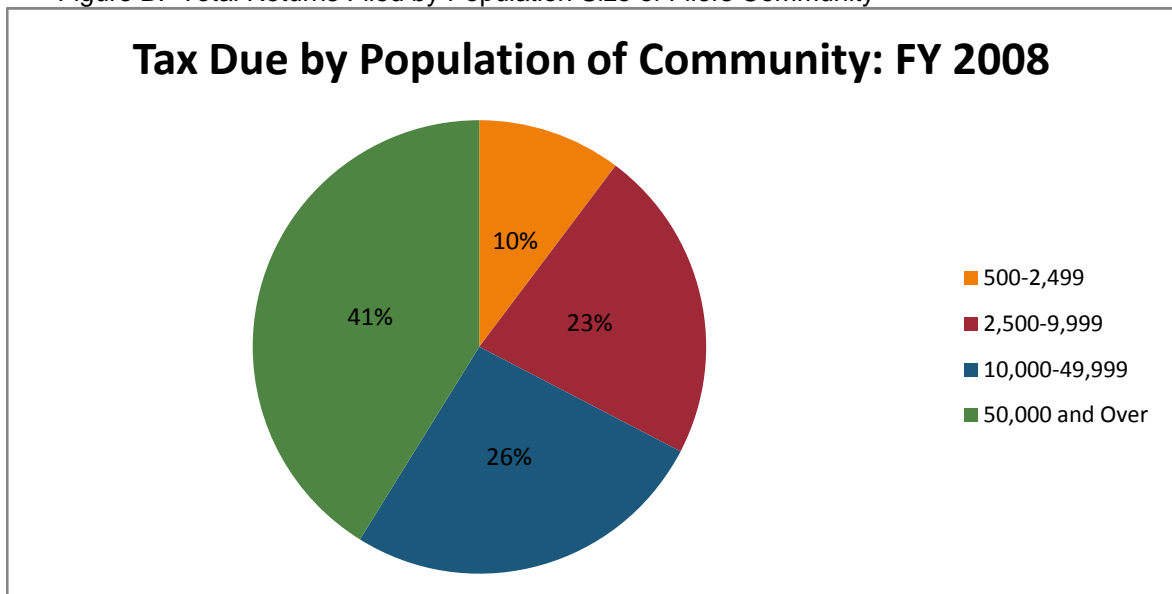


Figure B: Total Returns Filed by Population Size of Filers Community



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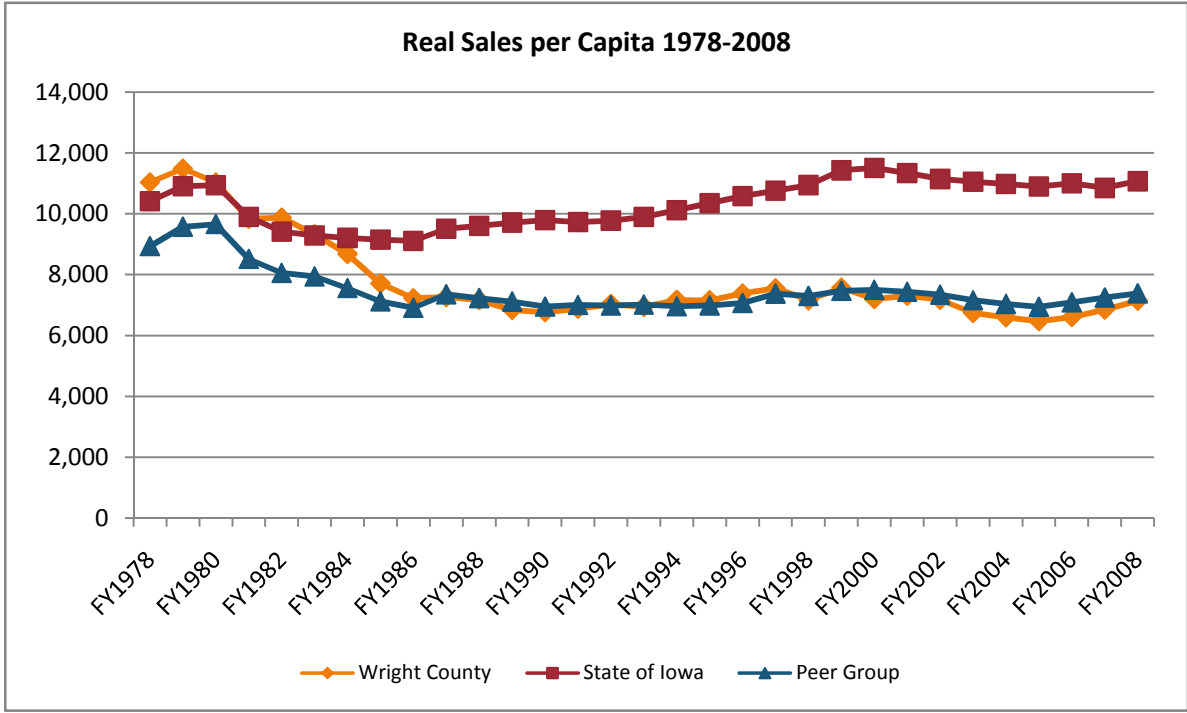


Retail Snapshot for Wright County

This section provides basic retail statistics for Wright County, including changes in levels from prior years. All sales figures are adjusted for inflation and expressed in 2008 dollars.

	2008	2007	% Change 2007-2008
Real retail sales (\$ millions)			
Wright County	93.4	90.4	3.4%
State of Iowa	33,089.0	32,263.5	2.6%
Peer Group: C	4,837.8	4,767.1	1.5%
Real per capita retail sales (\$)			
Wright County	7,153	6,852	4.4%
State of Iowa	11,074	10,854	2.0%
Peer Group: C	7,389	7,253	1.9%
Real retail sales per business			
Wright County	191,102	184,769	3.4%
State of Iowa	378,122	373,477	1.2%

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



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Demographic Snapshot for Wright County

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

Population level and change

	2008	2007	2000	Change 2000-2008	% Change 2000-2008
Wright County	13,064	13,192	13,892	(828)	-6.0%
State of Iowa	2,988,046	2,972,566	2,869,413	118,633	4.1%
Peer Group: C	654,690	657,285	674,577	(19,887)	-2.9%

Population distribution

2000 Census	Under 18	18-34	35-64	65 and up
Wright County	24.5%	16.5%	37.9%	21.1%
State of Iowa	25.0%	22.5%	37.5%	14.9%

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

Educational attainment distribution (Highest degree attained)

Percentage of adults

	Wright County	State of Iowa
Fewer than 12 years		
1990 Census	22.4	19.9
2000 Census	15.6	13.9
High school graduate		
1990 Census	38.6	38.5
2000 Census	39.1	36.1
Fewer than 4 years college		
1990 Census	27.7	24.7
2000 Census	31.8	28.8
College degree or higher		
1990 Census	11.3	16.9
2000 Census	13.5	21.2

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

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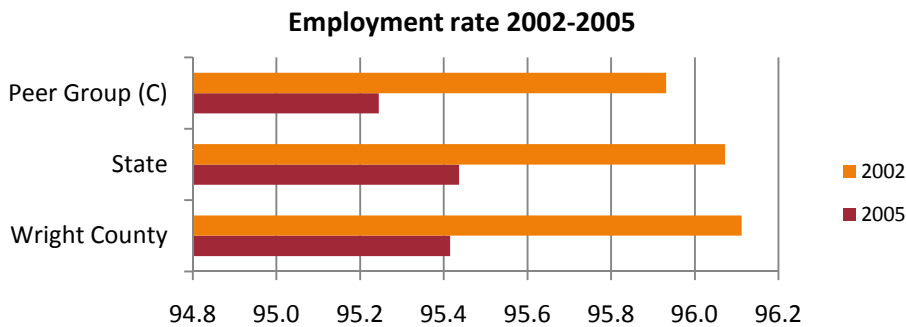
Economic Snapshot for Wright County

Employment and Wages

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

Employment/Labor Utilization

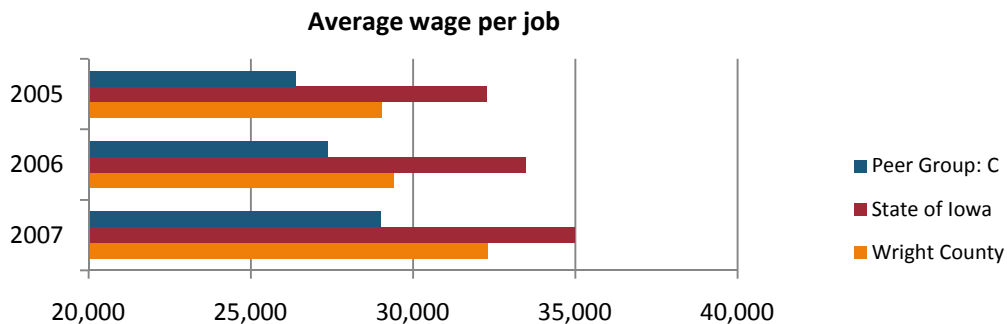
Total Civilian Labor Force	2002	2005
Wright County	7,279	7,263
State of Iowa	1,642,252	1,659,800
Employment Rate (%)		
Wright County	96.1	95.4
State	96.1	95.4
Peer Group: C	95.9	95.2



Source: Iowa Workforce Development

Average wage per job

	2007	2006	2005	% Change 2005-2007
Wright County	32,314	29,403	29,025	11.3%
State of Iowa	34,980	33,489	32,287	8.3%
Peer Group: C	28,998	27,387	26,383	9.9%
Wright County % of Iowa average	92.4%	87.8%	89.9%	2.5%
Wright County % of Peer average	111.4%	107.4%	110.0%	1.4%



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Economic Snapshot for Wright County

Income and Distribution

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

Personal income level

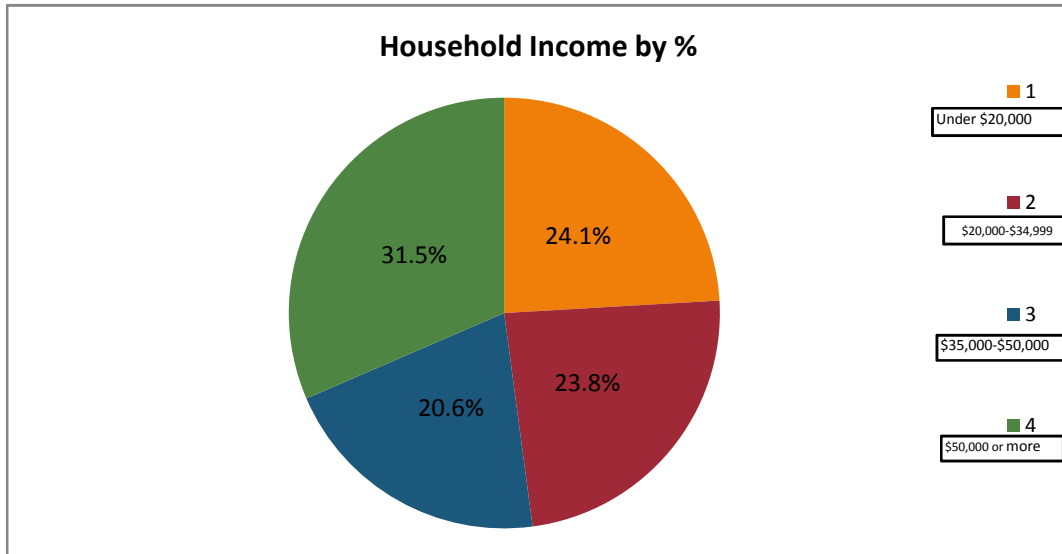
Per Capita Income	2007	2006	% Change 2006-2007
Wright County	31,434	29,820	5.4%
State of Iowa	32,672	30,861	5.9%
Peer Group: C	28,068	28,389	-1.1%

Wright County State Income Index
Wright County Peer Income Index

0.96 0.97
1.12 1.05

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

Household Income 2000 Census	Median Income	Under \$20,000 (1)	\$20,000 to \$34,999 (2)	\$35,000 to \$50,000 (3)	\$50,000 or more (4)
Wright County	36,197	24.1%	23.8%	20.6%	31.5%
State of Iowa	39,469	21.8%	22.1%	19.0%	37.1%

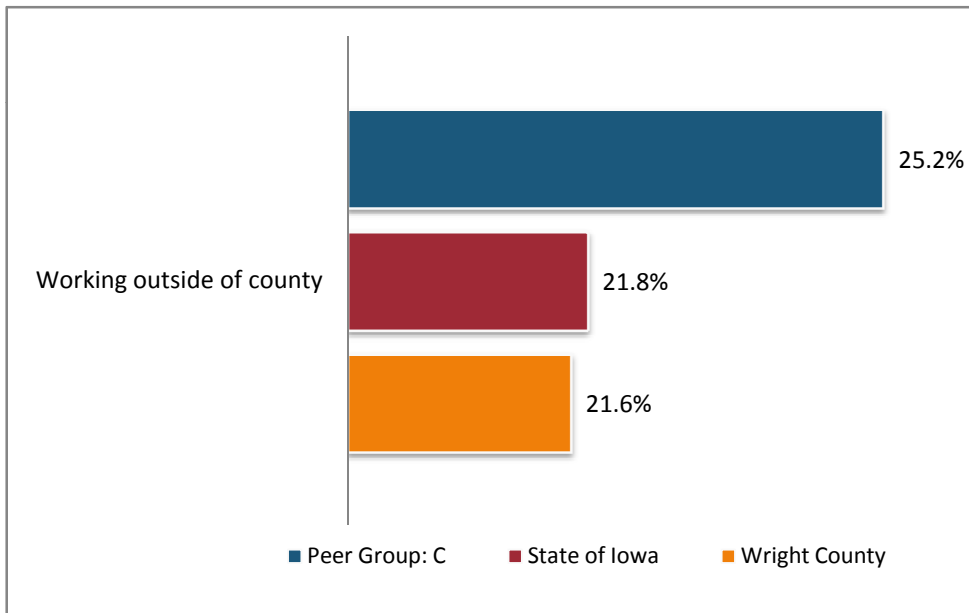




Economic Snapshot for Wright County Commuting Patterns

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

Out Commuting	Working outside of county	Working outside of city
Wright County	21.6%	42.2%
State of Iowa	21.8%	44.9%
Peer Group: C	25.2%	43.5%



Commuting Flow Ratio

Wright County
State of Iowa (avg.)

0.9
0.92

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

Daytime Population Change

Wright County
State of Iowa (avg.)

-0.5 %
-4.6 %

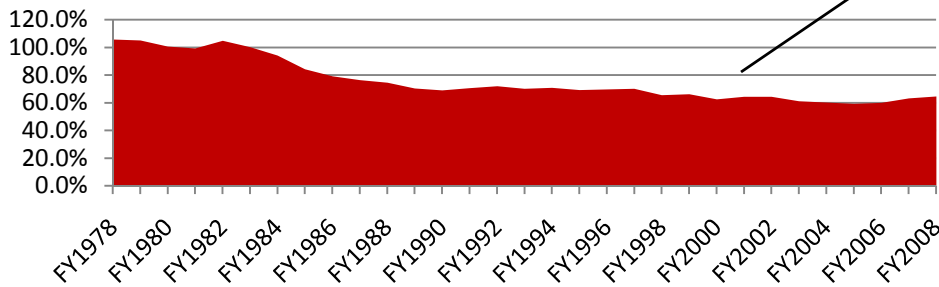
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Sales Data for Wright County

Year	Nominal Sales (\$)	Real Sales (\$)	Wright Per Capita Sales (\$)	State Per Capita Sales (\$)	Peer Group Per Capita Sales (\$)
FY1978	63,555,105	182,081,098	11,035	10,421	8,938
FY1979	71,445,143	190,693,369	11,488	10,915	9,575
FY1980	74,328,781	180,974,156	11,035	10,945	9,663
FY1981	72,873,535	160,607,317	9,842	9,903	8,520
FY1982	77,785,883	158,840,875	9,879	9,417	8,060
FY1983	76,053,840	147,760,956	9,326	9,291	7,945
FY1984	73,436,518	136,969,363	8,687	9,214	7,564
FY1985	67,785,905	121,972,514	7,720	9,154	7,130
FY1986	63,808,987	111,292,808	7,229	9,116	6,918
FY1987	63,295,295	107,832,828	7,270	9,512	7,356
FY1988	63,016,952	103,523,322	7,174	9,611	7,236
FY1989	62,190,966	98,064,403	6,849	9,718	7,121
FY1990	64,257,285	97,134,152	6,770	9,795	6,956
FY1991	67,997,114	98,251,314	6,886	9,733	7,009
FY1992	71,129,736	99,560,378	7,037	9,780	6,991
FY1993	72,755,986	99,070,834	6,951	9,901	7,024
FY1994	76,183,123	101,542,091	7,174	10,126	6,967
FY1995	78,117,973	101,860,222	7,164	10,351	6,996
FY1996	83,060,010	106,117,833	7,389	10,584	7,074
FY1997	86,381,432	107,999,121	7,557	10,766	7,383
FY1998	82,105,633	101,274,373	7,165	10,947	7,304
FY1999	87,012,005	106,307,221	7,572	11,432	7,472
FY2000	83,575,567	100,054,465	7,202	11,509	7,508
FY2001	89,508,992	104,674,896	7,313	11,345	7,442
FY2002	87,949,375	101,006,401	7,184	11,150	7,349
FY2003	82,714,470	93,397,240	6,751	11,058	7,166
FY2004	81,387,408	90,182,341	6,607	10,982	7,044
FY2005	81,508,969	87,829,682	6,476	10,902	6,947
FY2006	84,678,700	88,568,800	6,610	11,009	7,095
FY2007	88,667,175	90,398,119	6,852	10,854	7,253
FY2008	93,449,021	93,449,021	7,153	11,074	7,389

Per Capita Sales Index



The Per Capita Sales Index is the county's sales per capita divided by the states's sales per capita. It is used with the income index to determine the pull factor.

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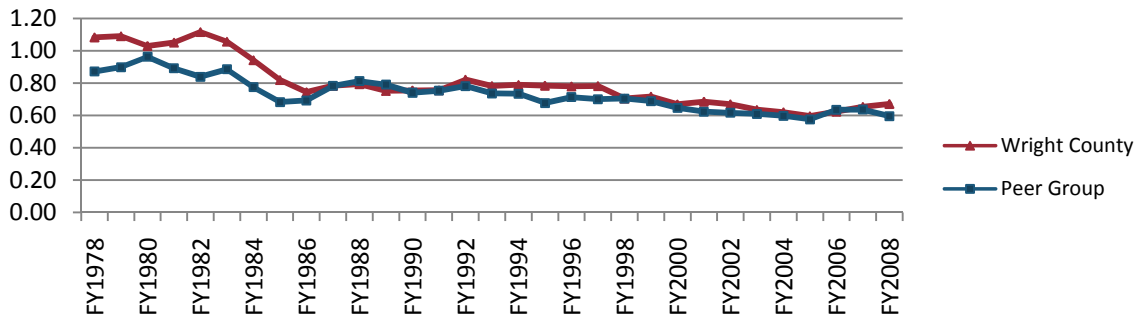


Sales Indicators for Wright County

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

Year	Number of firms	Sales per retail firm	Wright County Per Capita Sales Index	Peer Group Per Capita Sales Index	Wright County Pull Factor	Peer Group Pull Factor
FY1978	636	286,516	1.06	0.86	1.08	0.87
FY1979	648	294,280	1.05	0.88	1.09	0.90
FY1980	667	271,427	1.01	0.88	1.03	0.96
FY1981	656	244,922	0.99	0.86	1.05	0.89
FY1982	639	248,577	1.05	0.86	1.12	0.84
FY1983	632	233,984	1.00	0.86	1.06	0.89
FY1984	629	217,757	0.94	0.82	0.94	0.77
FY1985	630	193,530	0.84	0.78	0.82	0.68
FY1986	619	179,722	0.79	0.76	0.74	0.69
FY1987	603	178,827	0.76	0.77	0.78	0.78
FY1988	604	171,538	0.75	0.75	0.79	0.81
FY1989	601	163,237	0.70	0.73	0.75	0.79
FY1990	616	157,685	0.69	0.71	0.75	0.74
FY1991	606	162,265	0.71	0.72	0.76	0.75
FY1992	604	164,903	0.72	0.71	0.82	0.78
FY1993	609	162,611	0.70	0.71	0.78	0.74
FY1994	616	164,908	0.71	0.69	0.79	0.73
FY1995	594	171,626	0.69	0.68	0.78	0.68
FY1996	592	179,177	0.70	0.67	0.78	0.71
FY1997	596	181,207	0.70	0.69	0.78	0.70
FY1998	596	169,995	0.65	0.67	0.70	0.70
FY1999	573	185,689	0.66	0.65	0.72	0.69
FY2000	552	181,258	0.63	0.65	0.67	0.65
FY2001	543	192,949	0.64	0.66	0.69	0.62
FY2002	507	199,322	0.64	0.66	0.67	0.62
FY2003	471	198,401	0.61	0.65	0.63	0.61
FY2004	456	197,768	0.60	0.64	0.62	0.60
FY2005	449	195,503	0.59	0.64	0.60	0.58
FY2006	450	197,038	0.60	0.64	0.62	0.64
FY2007	489	184,769	0.63	0.67	0.65	0.64
FY2008	489	191,102	0.65	0.67	0.67	0.60

Pull Factor 1978-2008



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Sales Performance for Wright County

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

Year	Actual Sales	Potential Sales	Surplus (Leakage)	% Potential	Sales Capacity	Over (under) Capacity	% Capacity
FY1978	182,081,098	168,020,393	14,060,705	8.4%	146,506,017	35,575,081	24.3%
FY1979	190,693,369	177,060,568	13,632,802	7.7%	159,134,779	31,558,590	19.8%
FY1980	180,974,156	175,398,973	5,575,183	3.2%	168,912,503	12,061,653	7.1%
FY1981	160,607,317	157,918,368	2,688,949	1.7%	140,799,768	19,807,549	14.1%
FY1982	158,840,875	147,963,891	10,876,985	7.4%	124,186,019	34,654,856	27.9%
FY1983	147,760,956	143,851,540	3,909,416	2.7%	127,379,153	20,381,804	16.0%
FY1984	136,969,363	141,961,288	(4,991,925)	-3.5%	109,970,223	26,999,140	24.6%
FY1985	121,972,514	141,320,406	(19,347,892)	-13.7%	96,501,215	25,471,299	26.4%
FY1986	111,292,808	137,133,598	(25,840,790)	-18.8%	95,046,761	16,246,047	17.1%
FY1987	107,832,828	137,875,918	(30,043,089)	-21.8%	107,894,775	(61,947)	-0.1%
FY1988	103,523,322	135,525,594	(32,002,272)	-23.6%	110,071,440	(6,548,118)	-5.9%
FY1989	98,064,403	135,963,867	(37,899,463)	-27.9%	107,474,821	(9,410,418)	-8.8%
FY1990	97,134,152	137,336,962	(40,202,809)	-29.3%	101,716,666	(4,582,514)	-4.5%
FY1991	98,251,314	135,708,516	(37,457,201)	-27.6%	102,150,961	(3,899,646)	-3.8%
FY1992	99,560,378	135,226,337	(35,665,959)	-26.4%	105,744,348	(6,183,970)	-5.8%
FY1993	99,070,834	137,893,314	(38,822,480)	-28.2%	101,472,049	(2,401,216)	-2.4%
FY1994	101,542,091	140,060,186	(38,518,095)	-27.5%	102,844,715	(1,302,624)	-1.3%
FY1995	101,860,222	143,815,458	(41,955,236)	-29.2%	97,360,710	4,499,512	4.6%
FY1996	106,117,833	148,526,783	(42,408,950)	-28.6%	105,957,270	160,563	0.2%
FY1997	107,999,121	150,361,796	(42,362,676)	-28.2%	105,260,392	2,738,729	2.6%
FY1998	101,274,373	151,205,704	(49,931,331)	-33.0%	106,414,150	(5,139,777)	-4.8%
FY1999	106,307,221	156,832,344	(50,525,123)	-32.2%	108,016,891	(1,709,670)	-1.6%
FY2000	100,054,465	156,241,536	(56,187,070)	-36.0%	101,114,834	(1,060,369)	-1.0%
FY2001	104,674,896	158,679,793	(54,004,897)	-34.0%	98,758,109	5,916,787	6.0%
FY2002	101,006,401	153,192,573	(52,186,172)	-34.1%	94,384,995	6,621,406	7.0%
FY2003	93,397,240	149,487,790	(56,090,550)	-37.5%	91,167,686	2,229,554	2.4%
FY2004	90,182,341	146,477,279	(56,294,937)	-38.4%	87,615,322	2,567,020	2.9%
FY2005	87,829,682	144,476,346	(56,646,663)	-39.2%	83,157,782	4,671,900	5.6%
FY2006	88,568,800	144,141,946	(55,573,146)	-38.6%	91,620,522	(3,051,721)	-3.3%
FY2007	90,398,119	139,916,291	(49,518,172)	-35.4%	89,006,901	1,391,218	1.6%
FY2008	93,449,021	141,367,807	(47,918,786)	-33.9%	84,234,286	9,214,735	10.94%

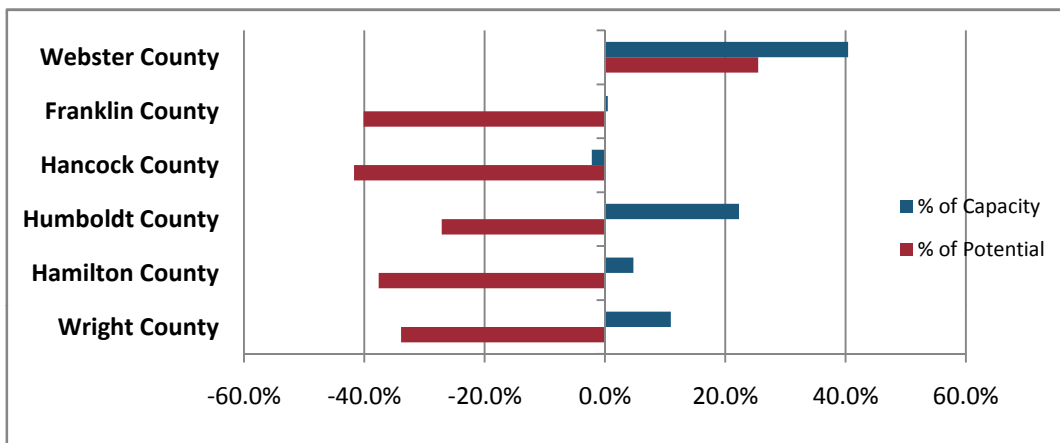
It is possible for a county to show a surplus but still be below its capacity, which simply indicates that it has a retail surplus but has the capacity to draw even more. The converse can be true, especially in smaller counties where they may show a leakage but may be at or above capacity.

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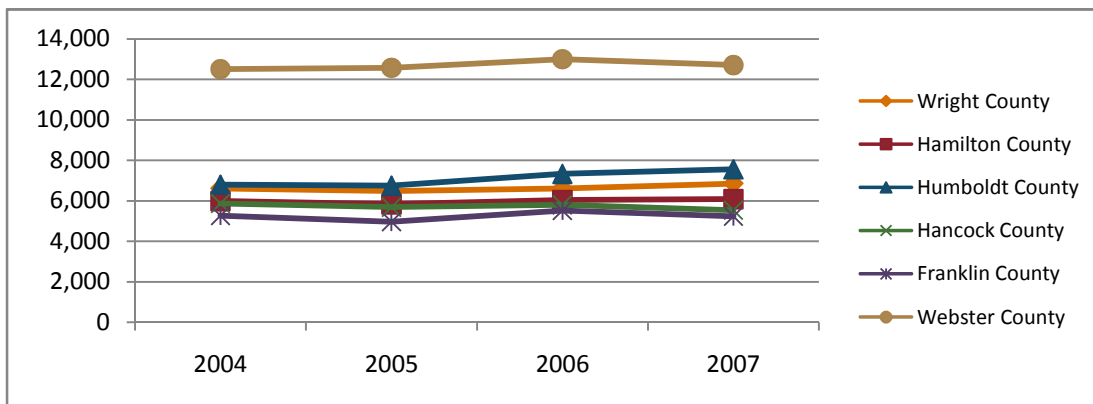
Geographic Competition Performance Measures for Wright County

Subject	Actual Sales	Potential Sales	Sales Capacity	% of Potential	% of Capacity
Wright County	93,449,021	141,367,807	84,234,286	-33.9%	10.9%
Hamilton County	97,695,179	156,574,507	93,295,228	-37.6%	4.7%
Humboldt County	71,623,933	98,299,321	58,571,844	-27.1%	22.3%
Hancock County	66,218,306	113,620,451	67,700,970	-41.7%	-2.2%
Franklin County	58,281,892	97,329,405	57,993,918	-40.1%	0.5%
Webster County	482,419,664	384,535,352	343,550,179	25.5%	40.4%



Real Per Capita Sales

(2008 \$)	2004	2005	2006	2007	2008
Wright County	6,607	6,476	6,610	6,852	7,153
Hamilton County	5,990	5,826	6,040	6,082	6,264
Humboldt County	6,791	6,748	7,322	7,549	7,449
Hancock County	5,863	5,687	5,794	5,539	5,819
Franklin County	5,262	4,959	5,509	5,231	5,515
Webster County	12,506	12,563	12,991	12,703	12,502



Iowa State University Retail Trade Analysis Program



E-Commerce and Internet Sales Impact for Wright County

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

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

Wright County

Actual Sales	93,449,021
Potential Sales	141,367,807
Estimated Internet Leakage	4,241,034
Potential Sales less internet leakage	137,126,772
Internet adjusted surplus (leakage)	(43,677,751)



Per Capita Estimated Internet Leakage	\$325
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Because internet retailing is a relatively new phenomenon, detailed data on the local impact on sales are difficult to find. This report uses the low estimate of 3% to try and account for some of the impact on local sales. In future reports and as data become available, more precise measures of e-commerce's impact will be presented.

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


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

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

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Pull Factors 	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008
Adair County	0.74	0.70	0.68	0.67	0.72	0.69	0.70	0.68
Adams County	0.58	0.61	0.66	0.61	0.58	0.58	0.69	0.63
Allamakee County	0.78	0.86	0.80	0.77	0.71	0.88	0.71	0.69
Appanoose County	0.74	0.77	0.79	0.78	0.76	0.77	0.80	0.79
Audubon County	0.52	0.53	0.53	0.51	0.51	0.50	0.52	0.53
Benton County	0.56	0.68	0.77	0.61	0.48	0.42	0.43	0.44
Black Hawk County	1.16	1.13	1.19	1.19	1.19	1.18	1.20	1.21
Boone County	0.64	0.59	0.61	0.64	0.63	0.62	0.62	0.55
Bremer County	0.68	0.67	0.65	0.65	0.61	0.58	0.63	0.62
Buchanan County	0.63	0.65	0.63	0.65	0.65	0.68	0.69	0.72
Buena Vista County	0.90	0.89	0.92	0.95	0.96	0.95	1.02	0.97
Butler County	0.50	0.48	0.47	0.44	0.43	0.40	0.37	0.36
Calhoun County	0.47	0.46	0.43	0.43	0.45	0.43	0.44	0.45
Carroll County	1.11	1.12	1.08	1.12	1.15	1.10	1.16	1.17
Cass County	0.83	0.83	0.84	0.82	0.79	0.91	0.91	0.95
Cedar County	0.44	0.45	0.46	0.44	0.45	0.44	0.46	0.45
Cerro Gordo County	1.28	1.27	1.27	1.28	1.25	1.27	1.32	1.32
Cherokee County	0.75	0.74	0.76	0.69	0.72	0.74	0.79	0.80
Chickasaw County	0.65	0.69	0.70	0.70	0.72	0.73	0.77	0.77
Clarke County	0.78	0.74	0.75	0.69	0.68	0.72	0.72	0.73
Clay County	1.41	1.36	1.30	1.30	1.27	1.37	1.56	1.58
Clayton County	0.58	0.60	0.57	0.55	0.58	0.58	0.66	0.67
Clinton County	0.93	0.89	0.88	0.87	0.91	1.02	1.05	1.08
Crawford County	0.75	0.75	0.73	0.73	0.73	0.72	0.71	0.71
Dallas County	0.55	0.57	0.62	0.63	0.97	1.01	1.06	1.09
Davis County	0.62	0.66	0.64	0.63	0.63	0.63	0.64	0.67
Decatur County	0.51	0.52	0.52	0.51	0.52	0.52	0.58	0.56
Delaware County	0.73	0.71	0.68	0.68	0.65	0.65	0.66	0.67
Des Moines County	1.12	1.10	1.11	1.13	1.09	1.10	1.15	1.10
Dickinson County	1.22	1.24	1.30	1.28	1.24	1.23	1.23	1.23
Dubuque County	1.13	1.13	1.13	1.14	1.15	1.16	1.17	1.14
Emmet County	1.00	0.97	0.99	0.92	0.83	0.83	0.86	0.86
Fayette County	0.85	0.80	0.73	0.69	0.70	0.68	0.70	0.69
Floyd County	0.73	0.70	0.70	0.68	0.65	0.60	0.64	0.64
Franklin County	0.64	0.61	0.57	0.54	0.53	0.60	0.58	0.60
Fremont County	0.68	0.69	0.76	0.77	0.76	0.75	0.75	0.73
Greene County	0.72	0.74	0.74	0.68	0.66	0.66	0.68	0.65
Grundy County	0.50	0.51	0.50	0.52	0.53	0.50	0.49	0.49
Guthrie County	0.55	0.59	0.55	0.52	0.51	0.50	0.50	0.50
Hamilton County	0.62	0.62	0.63	0.61	0.60	0.62	0.61	0.62
Hancock County	0.57	0.60	0.63	0.56	0.53	0.56	0.56	0.58
Hardin County	0.97	1.00	0.93	1.01	0.94	0.90	1.01	0.94
Harrison County	0.48	0.45	0.46	0.43	0.42	0.41	0.41	0.40
Henry County	0.73	0.75	0.73	0.75	0.81	0.76	0.80	0.84
Howard County	0.64	0.66	0.65	0.62	0.62	0.63	0.68	0.63
Humboldt County	0.72	0.79	0.73	0.69	0.68	0.74	0.76	0.73
Ida County	0.69	0.73	0.68	0.66	0.57	0.60	0.59	0.62
Iowa County	0.98	1.05	1.02	0.99	0.94	0.91	0.90	0.99
Jackson County	0.67	0.66	0.63	0.61	0.60	0.59	0.62	0.61

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Pull Factors 	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008
Jasper County	0.83	0.92	0.92	0.91	0.90	0.91	0.98	0.93
Jefferson County	0.98	0.93	0.99	1.12	1.18	1.09	1.08	1.01
Johnson County	1.02	0.98	1.02	1.12	1.11	1.10	1.14	1.13
Jones County	0.84	0.82	0.83	0.85	0.83	0.79	0.85	0.77
Keokuk County	0.36	0.37	0.33	0.34	0.34	0.33	0.36	0.36
Kossuth County	0.80	0.80	0.76	0.81	0.77	0.81	0.84	0.82
Lee County	0.89	0.88	0.86	0.90	0.86	0.87	0.88	0.90
Linn County	1.21	1.18	1.21	1.26	1.25	1.22	1.23	1.21
Louisa County	0.26	0.28	0.25	0.25	0.27	0.28	0.29	0.30
Lucas County	0.49	0.51	0.52	0.51	0.48	0.45	0.55	0.53
Lyon County	0.62	0.65	0.60	0.60	0.61	0.64	0.66	0.62
Madison County	0.61	0.62	0.53	0.54	0.53	0.53	0.50	0.49
Mahaska County	0.80	0.80	0.77	0.80	0.83	0.82	0.83	0.83
Marion County	0.71	0.66	0.73	0.74	0.74	0.73	0.72	0.74
Marshall County	0.93	0.96	0.92	0.86	0.83	0.84	0.84	0.83
Mills County	0.33	0.32	0.30	0.28	0.28	0.29	0.28	0.27
Mitchell County	0.65	0.65	0.62	0.58	0.60	0.63	0.68	0.64
Monona County	0.67	0.65	0.64	0.64	0.66	0.64	0.68	0.58
Monroe County	0.56	0.56	0.57	0.53	0.48	0.41	0.44	0.45
Montgomery County	0.82	0.79	0.74	0.74	0.71	0.69	0.73	0.76
Muscatine County	0.92	0.87	0.85	0.87	0.86	0.84	0.86	0.89
O'Brien County	0.77	0.78	0.78	0.76	0.81	0.79	0.76	0.79
Osceola County	0.69	0.69	0.69	0.69	0.62	0.66	0.70	0.68
Page County	0.67	0.60	0.62	0.63	0.64	0.62	0.64	0.60
Palo Alto County	0.68	0.76	0.73	0.70	0.75	0.93	1.02	0.88
Plymouth County	0.64	0.64	0.66	0.66	0.69	0.70	0.67	0.66
Pocahontas County	0.57	0.58	0.54	0.57	0.58	0.59	0.62	0.65
Polk County	1.30	1.29	1.29	1.22	1.21	1.18	1.15	1.12
Pottawattamie County	1.03	1.07	1.03	1.00	1.02	1.05	1.09	1.02
Poweshiek County	0.70	0.69	0.66	0.63	0.62	0.65	0.71	0.69
Ringgold County	0.62	1.16	1.08	0.79	0.85	0.80	0.96	0.90
Sac County	0.69	0.67	0.60	0.59	0.62	0.59	0.62	0.64
Scott County	1.19	1.20	1.20	1.26	1.25	1.19	1.18	1.14
Shelby County	0.71	0.66	0.65	0.61	0.62	0.63	0.63	0.62
Sioux County	0.88	0.89	0.85	0.90	0.92	1.01	1.00	1.02
Story County	0.89	0.89	0.93	0.95	0.93	0.92	0.93	0.89
Tama County	0.59	0.63	0.64	0.59	0.51	0.65	0.68	0.68
Taylor County	0.51	0.49	0.46	0.45	0.44	0.45	0.47	0.45
Union County	1.19	1.15	1.10	1.12	1.11	1.12	1.10	1.05
Van Buren County	0.46	0.49	0.40	0.39	0.39	0.38	0.44	0.45
Wapello County	1.07	1.05	1.00	0.97	1.08	1.06	1.07	1.06
Warren County	0.49	0.50	0.49	0.48	0.48	0.45	0.44	0.43
Washington County	0.64	0.61	0.61	0.62	0.59	0.58	0.64	0.65
Wayne County	0.45	0.47	0.49	0.48	0.51	0.49	0.49	0.50
Webster County	1.29	1.27	1.24	1.23	1.25	1.31	1.30	1.25
Winnebago County	0.79	0.86	0.74	0.67	0.65	0.65	0.67	0.68
Winneshiek County	0.86	0.87	0.80	0.81	0.84	0.83	0.87	0.86
Woodbury County	1.16	1.16	1.17	1.20	1.23	1.25	1.31	1.35
Worth County	0.44	0.41	0.35	0.38	0.41	0.37	0.45	0.44
Wright County	0.69	0.67	0.63	0.62	0.60	0.62	0.65	0.67

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Pull Factors by County, Lowest to Highest, Fiscal Year 2008

99. Mills County	0.27	49. Allamakee County	0.69
98. Louisa County	0.30	48. Crawford County	0.71
97. Butler County	0.36	47. Buchanan County	0.72
96. Keokuk County	0.36	46. Clarke County	0.73
95. Harrison County	0.40	45. Fremont County	0.73
94. Warren County	0.43	44. Humboldt County	0.73
93. Benton County	0.44	43. Marion County	0.74
92. Worth County	0.44	42. Montgomery County	0.76
91. Van Buren County	0.45	41. Chickasaw County	0.77
90. Taylor County	0.45	40. Jones County	0.77
89. Calhoun County	0.45	39. Appanoose County	0.79
88. Monroe County	0.45	38. O'Brien County	0.79
87. Cedar County	0.45	37. Cherokee County	0.80
86. Madison County	0.49	36. Kossuth County	0.82
85. Grundy County	0.49	35. Mahaska County	0.83
84. Guthrie County	0.50	34. Marshall County	0.83
83. Wayne County	0.50	33. Henry County	0.84
82. Lucas County	0.53	32. Emmet County	0.86
81. Audubon County	0.53	31. Winneshiek County	0.86
80. Boone County	0.55	30. Palo Alto County	0.88
79. Decatur County	0.56	29. Muscatine County	0.89
78. Monona County	0.58	28. Story County	0.89
77. Hancock County	0.58	27. Lee County	0.90
76. Franklin County	0.60	26. Ringgold County	0.90
75. Page County	0.60	25. Jasper County	0.93
74. Jackson County	0.61	24. Hardin County	0.94
73. Bremer County	0.62	23. Cass County	0.95
72. Ida County	0.62	22. Buena Vista County	0.97
71. Lyon County	0.62	21. Iowa County	0.99
70. Hamilton County	0.62	20. Jefferson County	1.01
69. Shelby County	0.62	19. Pottawattamie County	1.02
68. Howard County	0.63	18. Sioux County	1.02
67. Adams County	0.63	17. Union County	1.05
66. Mitchell County	0.64	16. Wapello County	1.06
65. Floyd County	0.64	15. Clinton County	1.08
64. Sac County	0.64	14. Dallas County	1.09
63. Washington County	0.65	13. Des Moines County	1.10
62. Pocahontas County	0.65	12. Polk County	1.12
61. Greene County	0.65	11. Johnson County	1.13
60. Plymouth County	0.66	10. Dubuque County	1.14
59. Delaware County	0.67	9. Scott County	1.14
58. Wright County	0.67	8. Carroll County	1.17
57. Davis County	0.67	7. Black Hawk County	1.21
56. Clayton County	0.67	6. Linn County	1.21
55. Adair County	0.68	5. Dickinson County	1.23
54. Tama County	0.68	4. Webster County	1.25
53. Osceola County	0.68	3. Cerro Gordo County	1.32
52. Winnebago County	0.68	2. Woodbury County	1.35
51. Fayette County	0.69	1. Clay County	1.58
50. Poweshiek County	0.69		

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Per Capita Sales (\$) by County, Lowest to Highest, Fiscal Year 2008

99. Louisa County	2,846	49. Ringgold County	6,812
98. Keokuk County	3,223	48. Buchanan County	6,814
97. Butler County	3,291	47. Bremer County	6,861
96. Mills County	3,420	46. Washington County	6,931
95. Van Buren County	3,450	45. Montgomery County	7,012
94. Taylor County	3,469	44. Plymouth County	7,027
93. Worth County	3,735	43. Chickasaw County	7,096
92. Wayne County	3,757	42. Wright County	7,153
91. Decatur County	3,852	41. Fremont County	7,263
90. Harrison County	3,929	40. Humboldt County	7,449
89. Calhoun County	3,965	39. Palo Alto County	7,461
88. Lucas County	4,235	38. Poweshiek County	7,594
87. Benton County	4,389	37. Marion County	7,676
86. Monroe County	4,450	36. Cherokee County	7,740
85. Cedar County	4,807	35. Emmet County	7,835
84. Warren County	4,990	34. O'Brien County	7,875
83. Guthrie County	5,007	33. Mahaska County	7,913
82. Monona County	5,032	32. Henry County	7,992
81. Audubon County	5,133	31. Lee County	8,586
80. Davis County	5,194	30. Kossuth County	8,628
79. Madison County	5,288	29. Buena Vista County	8,750
78. Grundy County	5,297	28. Hardin County	8,808
77. Lyon County	5,357	27. Marshall County	8,902
76. Adams County	5,414	26. Winneshiek County	9,145
75. Osceola County	5,450	25. Jasper County	9,205
74. Pocahontas County	5,460	24. Cass County	9,309
73. Franklin County	5,515	23. Sioux County	9,529
72. Jackson County	5,552	22. Union County	9,700
71. Fayette County	5,578	21. Story County	10,037
70. Mitchell County	5,598	20. Wapello County	10,085
69. Page County	5,720	19. Muscatine County	10,413
68. Hancock County	5,819	18. Clinton County	10,646
67. Howard County	5,913	17. Jefferson County	10,898
66. Sac County	5,933	State of Iowa	11,074
65. Tama County	5,943	16. Iowa County	11,121
64. Allamakee County	6,003	15. Pottawattamie County	11,319
63. Clayton County	6,046	14. Des Moines County	11,871
62. Ida County	6,072	13. Carroll County	12,092
61. Greene County	6,165	12. Dubuque County	12,258
60. Shelby County	6,190	11. Webster County	12,502
59. Boone County	6,224	10. Black Hawk County	12,958
58. Hamilton County	6,264	9. Johnson County	13,464
57. Clarke County	6,283	8. Woodbury County	13,585
56. Delaware County	6,294	7. Dallas County	14,395
55. Winnebago County	6,299	6. Scott County	14,441
54. Crawford County	6,430	5. Cerro Gordo County	14,790
53. Floyd County	6,436	4. Linn County	15,121
52. Adair County	6,456	3. Dickinson County	15,479
51. Jones County	6,473	2. Polk County	15,709
50. Appanoose County	6,473	1. Clay County	16,114

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Change in Real Retail Sales 2000-2008 for Iowa's Counties

99. Butler County	-32.6%	49. Mitchell County	-5.1%
98. Monroe County	-26.9%	48. Mills County	-4.9%
97. Fayette County	-25.4%	47. Cerro Gordo County	-4.8%
96. Monona County	-24.1%	46. Pocahontas County	-4.7%
95. Harrison County	-23.5%	45. Keokuk County	-4.2%
94. Emmet County	-22.1%	44. Poweshiek County	-3.7%
93. Greene County	-21.8%	43. Audubon County	-3.4%
92. Montgomery County	-20.5%	42. Decatur County	-1.9%
91. Page County	-18.9%	41. Story County	-1.7%
90. Allamakee County	-18.0%	40. Worth County	-1.6%
89. Calhoun County	-17.8%	39. Bremer County	-1.3%
88. Iowa County	-17.4%	38. Hancock County	-1.3%
87. Lucas County	-17.2%	37. Buena Vista County	-1.3%
86. Adair County	-16.8%	36. Grundy County	-0.8%
85. Winnebago County	-16.5%	35. Linn County	-0.7%
84. Ida County	-16.4%	34. Wapello County	-0.4%
83. Shelby County	-16.3%	State of Iowa	0.2%
82. Benton County	-16.0%	33. Chickasaw County	0.2%
81. Howard County	-15.5%	32. Jefferson County	0.3%
80. Guthrie County	-15.2%	31. Washington County	0.7%
79. Floyd County	-14.6%	30. Cass County	0.8%
78. Marshall County	-14.4%	29. Marion County	1.0%
77. Clarke County	-14.2%	28. Carroll County	1.6%
76. Webster County	-13.8%	27. Plymouth County	2.1%
75. Hardin County	-13.7%	26. Lyon County	2.1%
74. Sac County	-13.6%	25. Scott County	2.3%
73. Taylor County	-13.4%	24. Dubuque County	2.4%
72. Van Buren County	-11.6%	23. Woodbury County	2.7%
71. Jones County	-11.4%	22. Davis County	2.7%
70. Cherokee County	-11.3%	21. Pottawattamie County	2.7%
69. Appanoose County	-10.9%	20. Warren County	3.3%
68. Adams County	-10.9%	19. Dickinson County	3.9%
67. Osceola County	-10.6%	18. O'Brien County	4.1%
66. Jackson County	-10.5%	17. Black Hawk County	4.4%
65. Humboldt County	-10.2%	16. Clayton County	4.8%
64. Des Moines County	-10.2%	15. Winneshiek County	5.4%
63. Crawford County	-9.8%	14. Kossuth County	7.0%
62. Polk County	-9.4%	13. Muscatine County	7.3%
61. Boone County	-9.4%	12. Henry County	8.4%
60. Union County	-9.4%	11. Tama County	9.4%
59. Hamilton County	-9.0%	10. Louisa County	10.9%
58. Lee County	-8.5%	9. Buchanan County	11.4%
57. Madison County	-8.2%	8. Clay County	12.2%
56. Franklin County	-7.8%	7. Johnson County	17.6%
55. Fremont County	-7.5%	6. Palo Alto County	18.9%
54. Delaware County	-7.1%	5. Clinton County	20.5%
53. Wright County	-6.6%	4. Sioux County	21.4%
52. Mahaska County	-6.5%	3. Jasper County	25.4%
51. Wayne County	-6.0%	2. Ringgold County	40.4%
50. Cedar County	-5.9%	1. Dallas County	213.4%

Iowa State University Retail Trade Analysis Program

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