

2019 | Brookings Economic Development Corporation



Brookings County Consumer Survey

Results | September, 2019

CONTACT INFORMATION

Inquiries about this report should be directed to:

Brookings Economic Development Corporation

2301 Research Park Way, Ste 113

Brookings, SD 57006

(605) 697-8103 | bedc@brookingsedc.com

Report Author

Kristi Larsen, BEDC Marketing Director



MISSION

Build the economy by leading collaborative efforts that support a prosperous place to live, learn, work and play.

BrookingsEDC.com

Brookings County Consumer Survey Results

Table of Contents

Executive Summary	4
Key Findings.....	4
Introduction	5
Background/BEDC Role.....	5
Methodology.....	6
Summary of Survey Results	
Part One: Characteristics of Participants.....	8
Part Two: General Impressions about Brookings County.....	14
Part Three: Shopping and Dining Preferences.....	17
Part Four: Characteristics of Selected Populations.....	26
<i>Outbound Commuters</i>	27
<i>Young Adults/Students</i>	29
<i>Young Families with Children</i>	31
<i>Retirees</i>	33
2013 Community Survey Comparison	35
Fundamentals of Retail Recruitment	38
Site Selection Process and Brookings Market Challenges.....	39
Appendices	
A. Data Sources	
B. Brookings County Consumer Survey	
C. Retail Leakage and Surplus Analysis, Buxton 2018	
D. 2013 Brookings Area Community Survey Results	

Executive Summary

The retail industry is one of the most dynamic sectors in the economy, constantly evolving and adapting as consumer expectations and preferences change and new technologies emerge. In Brookings, retail recruitment has always been a challenge for a variety of reasons, yet demand from residents for more retail and dining opportunities continues to increase. Meanwhile, the job growth of Brookings employers is outpacing population growth, leading to a shortage of workers. For potential employees and residents, community attractiveness, including the availability of amenities and retail options, helps drive location decisions. By examining the shopping and dining habits and preferences of residents and workers and their overall impressions of Brookings County, valuable insight can be gathered to use in the development of programs that support retail industry growth and help position the Brookings community and surrounding area as a desired home for current and future residents.

A majority of the data in this report comes from the *Brookings County Consumer Survey*, completed by 2,123 participants in late April and early May of 2019. The survey was conducted by Brookings Economic Development Corporation (BEDC). A complete list of survey questions is located in *Appendix B*.

Key Findings

- More than 50% of participants at every life stage indicated they dine mostly or always in Brookings County, with *Retired* as the most likely and *Young Family with Children* as the least likely. While varying slightly depending on life stage, participants overall prefer to dine out for dinner slightly more often than lunch.
- *Sporting Goods/Toys/Hobby/Books/Music* and *Clothing/Clothing Accessories* are the store categories most susceptible to being subject to online sales.
- *Young Family with Children* is the life stage most likely to shop online, while *Retired* is the least likely.
- *Clothing/Clothing Accessories* is the store category most likely to experience leakage, with participants selecting they shop mostly or always outside of Brookings County 40% of the time.
- *Young Adult/Student* is the life stage most likely to shop outside of Brookings County while *Retired* is the least likely.
- *Outbound Commuters* and *College Students* are identified as potential labor pools for Brookings County employers.
- When asked what types of stores they would like to see more of, the top three categories selected were *Family Restaurants*, *Clothing/Clothing Accessories* and *Groceries/Specialty Food/Beverages*.
- *Target* was by far the most requested retailer and *Big Box/Discount/Super Store* the most requested retail category.
- *Olive Garden* was the most requested restaurant and *Ethnic* was the most requested restaurant type.
- *Retired* and *Young Family with Children* are the life stages most likely to encourage people to move here.
- Participants would like additional shopping and retail options, more affordable housing options and infrastructure improvements including better road conditions and snow removal processes.
- Small town atmosphere with big city amenities, the friendly, welcoming people and overall safety are the features of Brookings that participants like the most.

Next Steps

This survey research is part of a comprehensive report about the current and future retail landscape of Brookings being compiled by BEDC. By analyzing local consumer demand, retail leakage and surplus, community strengths and weaknesses and overall industry growth trends, data-driven solutions can be identified that will position Brookings for future growth within the retail industry. Projected completion date is December, 2019.

Introduction

The retail industry is the largest private-sector employer in the United States, creating jobs in communities across the country and representing a leading indicator of economic health for those communities. According to the Bureau of Labor Statistics, 3,835 private sector retail establishments in South Dakota supported 52,264 employees in 2018. In Brookings County, 115 establishments employed 1,940 workers, providing an annual payroll of \$49.5 million.

The taxes that are generated by retail sales are used to pay for general government expenditures at the state and local levels. In 2018, the city of Brookings received \$14.9 million from all taxable sales and gross receipts. The retail industry alone generated \$8.1 million, over half of that total.

Today's rapidly evolving retail environment presents significant challenges to recruiting national retailers to small, rural communities. The growth in popularity of online shopping, uncertainty from trade wars and changing consumer preferences all contribute to the decision-making process when retailers evaluate whether to invest in a new store or a new market.

Brookings has its own set of challenges that make it even more difficult to attract new stores, including:

- Proximity to Sioux Falls, the state's largest city and home to a large concentration of shopping and dining options.
- Location between Sioux Falls and Watertown, both identified as regional shopping centers.
- Lack of adequate population and households needed to make a market attractive for new investment.
- Limited availability of development sites along high traffic corridors.

Maintaining a healthy, sustainable industry is vitally important to ensuring that the Brookings area economy continues to grow and prosper, attracting and retaining residents who shop and dine in local establishments and provide workforce for local businesses. This research is part of a comprehensive study on the current and projected retail landscape of the region. By analyzing local consumer demand, retail leakage and surplus, community strengths and weaknesses and overall industry growth trends, data-driven solutions can be identified that will position Brookings for future growth within the retail industry.

The *Brookings Area Consumer Survey* report analyzes the shopping and dining preferences of residents and workers, measures the demand for new retail and dining establishments and offers feedback on how participants feel overall about living and working in Brookings County. Although consumer demand is just one of many criteria that retailers consider when deciding to open new stores or enter new markets, the survey results could potentially be used to assist in retail recruitment efforts, demonstrating the community's appetite for particular stores and restaurants.

Background/BEDC Role

As the lead economic development entity in Brookings County, BEDC collaborates closely with the city of Brookings on retail development initiatives. In addition to maintaining and distributing data on demographic and economic trends and market highlights, the organization identifies and recruits national and regional retail prospects, maintains a database of available properties and provides support for local entrepreneurs interested in retail start-up opportunities.

BEDC's economic development strategy is derived from the desires of the residents. Monitoring consumer behavior, preferences and satisfaction levels through periodic surveys, task forces, visioning charrettes and other community engagement activity is vital to establishing and implementing BEDC's work program to fulfill the organization's mission: *Build the economy by leading collaborative efforts that support a prosperous place to live, learn, work and play.*

Methodology

A majority of the data presented in this report comes from the *Brookings Area Consumer Survey*, conducted by BEDC from 4/22/19 through 5/6/19. The survey was distributed online through Survey Monkey and advertised utilizing both paid (print, radio and social media) and unpaid (press release, email distribution) methods. A total of 2,123 responses were received.

Based on answers provided, not all questions were asked of all participants. For instance, those who identified as *outbound commuters* (lived in Brookings County but worked outside) were asked a specific list of questions that others were not. The data in this report includes participation information for each question - which participants were asked the question, the number who responded and the number who skipped the question or were excluded.

Individual responses to open-ended questions were analyzed and grouped by category for the purpose of displaying summarized data in this report.

The original survey questions are included in *Appendix B*. Please refer to this document for non-abbreviated store categories and descriptions.

Targeted Participants and Report Details

The main audience for the survey was anyone who lived and/or worked in Brookings County. Only 21 participants (1%) did not meet this requirement.

Participants were divided into six life stages to identify possible trends within different age groups. Other general characteristics included: place of work, tenure in Brookings County, current employment status, current education level and average household income. Where applicable, these attributes were utilized to further analyze survey responses. The analysis of survey participant characteristics is provided in *Part One* of “Summary of Survey Results”.

Participants were asked about their overall impression of Brookings County - whether they would encourage others to move here, what improvements they would like to see and what they like most about Brookings. Results can be found in *Part Two* of “Summary of Survey Results”.

Part Three of “Summary of Survey Results” identifies consumer preferences related to shopping and dining for several retail store categories and restaurants including:

- in-store versus online
- in Brookings County versus outside of Brookings County
- requested retailers and restaurants by name and category

Part Four of “Summary of Survey Results” provides a separate analysis of four selected survey participant groups: *Outbound Commuters* (those who live in Brookings County but work outside of Brookings County), *Young Adults/Students*, *Young Families with Children* and *Retirees*. These participants represent key economic development initiatives currently underway related to community growth and workforce development so this research can be used to help identify potential program strategies. Data analysis on other survey categories is available upon request.

Bonus Findings

Throughout this report, segments labeled “Bonus Findings” provide additional data that relate to the survey results. This supporting data was derived from outside sources. A list of all data sources can be found in *Appendix A*.

2013 Survey Comparison

A similar survey was completed in 2013. While the questions were not identical, some of the results were compared to the 2019 survey to help identify trends and possible areas of concern as well as provide other insights to aid in the development and implementation of economic development strategies and programs. The summary of this comparison is located on page 35.

Data Limitations

As is common in survey methodologies with a self-selecting sample, the data for the *Brookings County Consumer Survey* has a few limitations:

- Some survey questions were open to interpretation by the participants resulting in inconsistent data. For example, 210 participants indicated they were college students when asked where they currently lived, while 265 responded that they were college students when asked their current employment status.
- Individual responses to open-ended questions were analyzed and grouped by category for the purpose of displaying summarized data in this report. Open-ended responses are subject to interpretation which may not represent the true, accurate meaning of the participant.
- Average household income results were skewed towards the higher income brackets when compared to Census data. This could be due to lack of participation from lower income households and younger life stages such as *Young Adult/Student*.
- 30.1% of participants identified as *Young Family with Children*, representing the largest segment of the survey responses. Results may be skewed slightly in favor of this life stage.
- The timing of the survey, late April to early May, coincided with weather patterns that included a high rate of snowfall followed by heavy rains resulting in road maintenance issues. Poor road conditions were brought up many times by participants in their responses to open-ended questions. The results may have been different had the survey been offered during another time of year.
- To determine sampling size, participants were divided into categories depending on where they live: within Brookings city limits; neighboring community in Brookings County; farm/rural area in Brookings County; outside of Brookings County; college student – on campus; and college student – off-campus. The results were compared to estimates obtained from the U.S. Census and S.D. Board of Regents. The survey margin of error falls within an acceptable range for all but the college student categories.

In spite of these limitations, the information gathered by the survey provides valuable insight into the shopping and dining preferences and overall impressions of Brookings County from residents and workers at different life stages, household income brackets, employment statuses and educational attainment levels. The survey participation of 2,123 represents a significant sampling that can be used to help identify general trends and community strengths and weaknesses in order to develop potential initiatives that address sustainable retail industry growth as well as recruitment and retention of residents.

Survey Responses by Life Stage	# of Participants	% of Participants
Young Adult/Student	299	14.1%
Early-Mid Career, No Children	274	12.9%
Young Family with Children	640	30.1%
Adult (Single or Married) with Older Dependent Children	359	16.9%
Mid-Late Career, No Children or Empty Nester	328	15.4%
Retired	178	8.4%
No Response	45	2.1%



SUMMARY OF SURVEY RESULTS

Part One

Characteristics of Participants

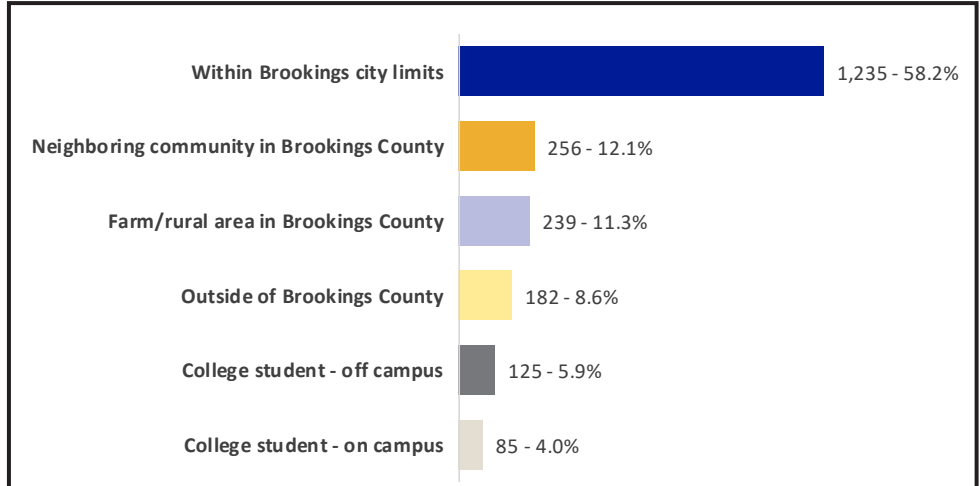
Q: Where do you currently live?

Audience: All

Answered: 2,122 Skipped: 1

Summary

Participants who live within Brookings city limits were the largest category represented (58.2%). Answers were compared to actual population and commuting estimates and SDSU enrollment statistics to determine if the survey represented an adequate participation from each group. The margin of error falls within acceptable limits for all but the college student categories.



Category	Population	Survey Representation	Source	Sampling Size Results
Brookings City	24,509	5.0% (1,235)	U.S. Census 2018 Estimate	95% Confidence Level 3% Margin of Error
Brookings County Excluding City	10,723	4.6% (495)	U.S. Census 2018 Estimate	95% Confidence Level 4% Margin of Error
Workforce Commuting In*	7,074	2.6% (182)	U.S. Census 2015 Inflow/Outflow	95% Confidence Level 7% Margin of Error
SDSU Enrollment	12,527	1.7% (210)	S.D. Board of Regents Fall, 2017	95% Confidence Level 7% Margin of Error
College Student Brookings County	8,584	2.4% (210)	U.S. Census 2017 Estimate	95% Confidence Level 7% Margin of Error
College Student Off Campus	5,272	2.4% (125)	U.S. Census 2017 Estimate	95% Confidence Level 9% Margin of Error
College Student On Campus	3,312	2.6% (85)	U.S. Census 2017 Estimate	95% Confidence Level 10% Margin of Error

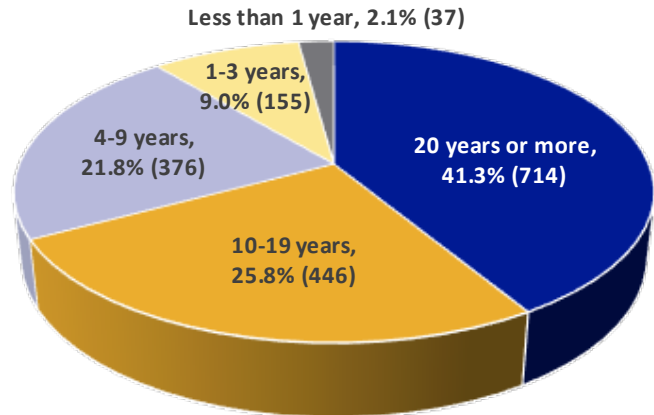
* Workforce Commuting In: individuals who work for a Brookings County employer but live outside of Brookings County, including those who work off site.

Q: How many years have you lived in Brookings County?

Audience: Participants indicating they live outside of Brookings County and college students were excluded.
 Answered: 1,728 Skipped/Excluded: 395

Summary

Of the survey participants who indicated they live in Brookings County or within Brookings city limits, excluding college students, a majority (67.1%) have lived here for 10 or more years.



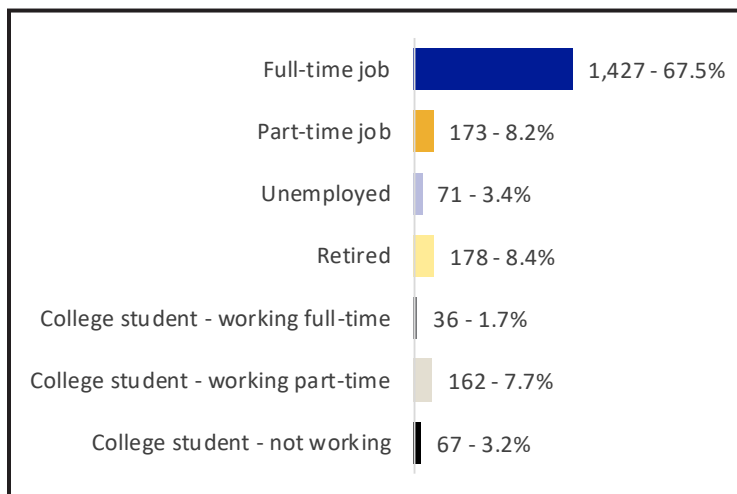
Q: Please choose the option that best describes your current employment status.

Audience: All
 Answered: 2,114 Skipped: 9

Summary

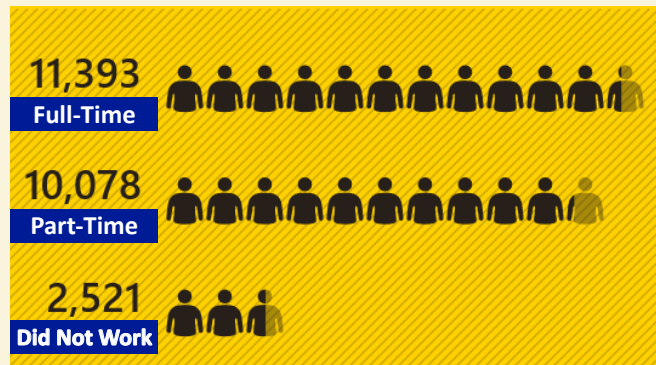
Approximately 85% of the survey participants work either part-time or full-time.

Although the survey participation included a relatively small sampling of college students (265), the results demonstrate the potential labor pool provided by this group, with 74.7% of the students indicating they work either part-time or full-time.



BROOKINGS COUNTY EMPLOYMENT

Overall Brookings County 2017 Census estimates for ages 16-64 show employment status for the 23,992 individuals in this age group as: 47.5% full-time; 42% part-time; and 10.5% unemployed. This data does include college students.

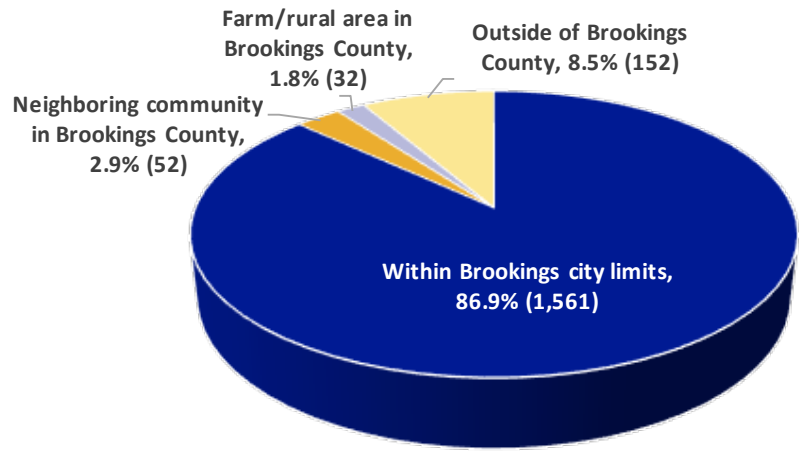


Q: Where do you work?

Audience: Retired, unemployed and college students not working were excluded.
 Answered: 1,797 Skipped/Excluded: 326

Summary

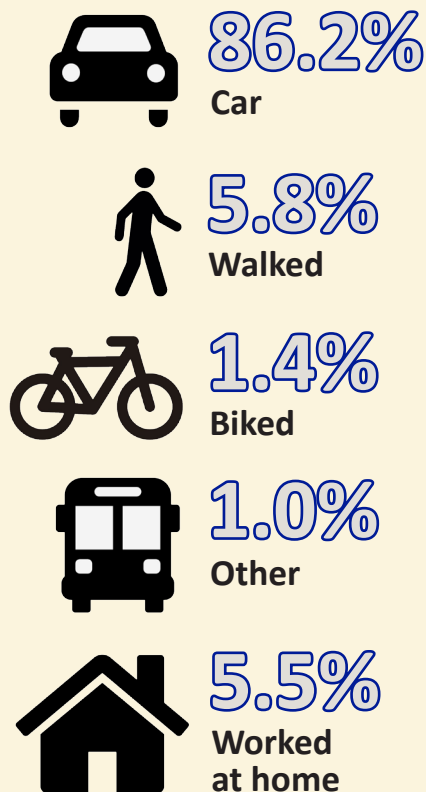
Most (86.9%) of the survey participants who indicated they were currently employed are working within Brookings city limits. Further analysis shows that 93.6% of the participants who live within Brookings city limits (excluding college students) also work within the city limits, while 5.1% work outside of Brookings County. Of the 198 college students who are currently employed, 83.8% work within city limits, while 14.1% work outside of Brookings County.



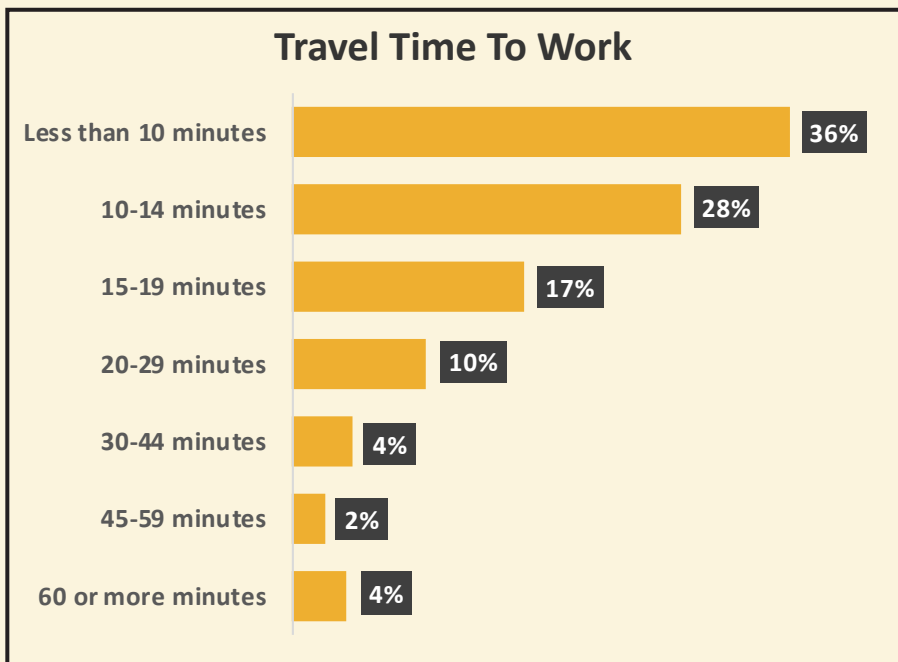
COMMUTING TO WORK

Census estimates show that Brookings County workers spend an average of 14.9 minutes commuting to work. Approximately 6% of these workers travel 45 minutes or more to their place of work and 5.5% worked from their homes. Further analysis on *Outbound Commuters*, those who live in Brookings County but work outside of Brookings County, is provided on pages 27-28 of this report.

Means of Transportation



Travel Time To Work



Q: Please choose the option that best describes your current education level.

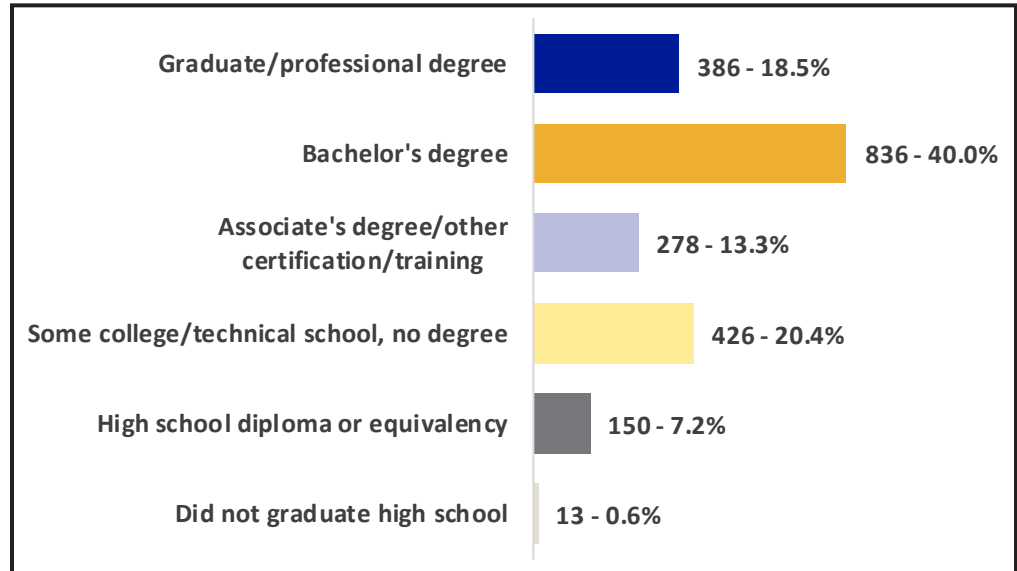
Audience: All

Answered: 2,089 Skipped: 34

Summary

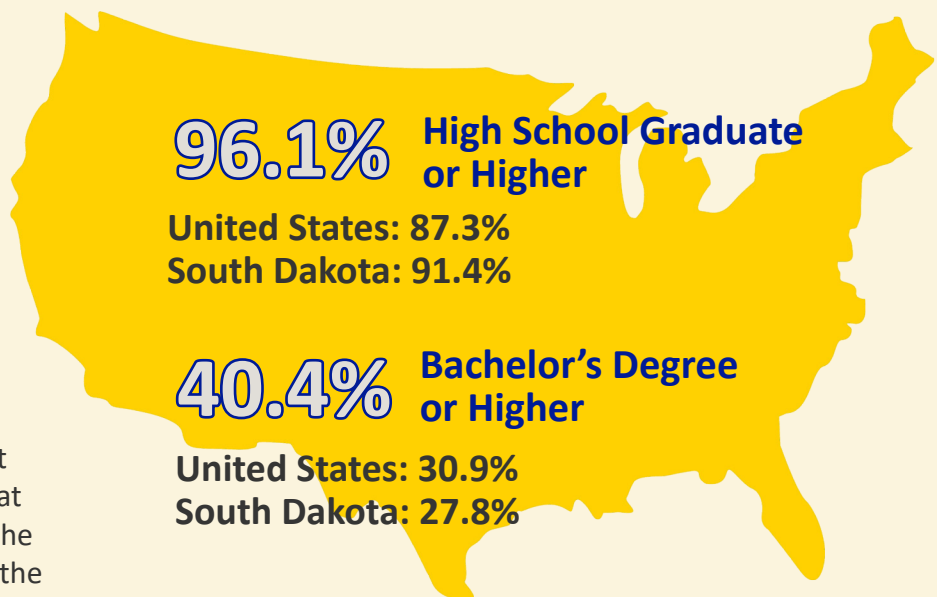
Survey participants holding a bachelor's, graduate or professional degree represented the largest category at 58.5%.

Further analysis of education levels for participants who work outside of Brookings County shows that 59.1% (81 of 137 workers) indicated they had a bachelor's, graduate or professional degree while 15.3% had an associate degree or other certification. The remaining 25.5% did not have a post secondary degree or certification. While this survey sampling is relatively small, the results may represent an opportunity for further research to determine if workers that are employed outside of Brookings County could provide a possible supply source to address the current workforce shortage.



BROOKINGS COUNTY EDUCATIONAL ATTAINMENT

Census 2017 estimates show the percentage of Brookings County residents that have graduated from high school (96.1%) and that have earned a bachelor's degree at minimum (40.4%) is higher than the percentages for the state and for the country.

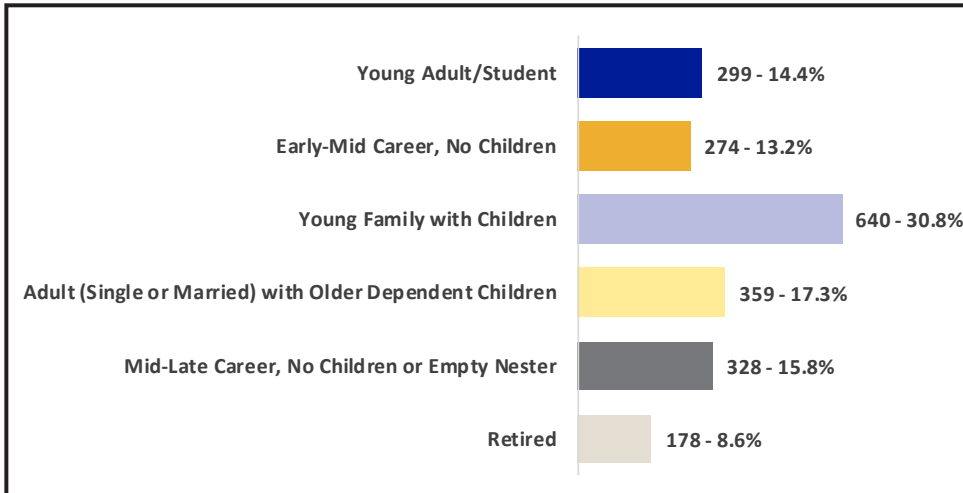


Q: Please choose the option that best describes your current stage of life.

Audience: All
 Answered: 2,078 Skipped: 45

Summary

The survey results provide a good mix of participation at every life stage.



Bonus Finding

BROOKINGS COUNTY POPULATION BY AGE

TOTAL	33,697
Under 18	6,801 (20.2%)
Under 5	2,055 (6.1%)
5 to 14	3,741 (11.1%)
15 to 17	1,005 (3.0%)
18 to 24	9,102 (27.0%)
25 to 44	7,724 (22.9%)
45 to 64	6,417 (19.0%)
65 & Over	3,653 (10.8%)

Median Age **26.7**

Source: U.S. Census 2017 Estimates
 (Census population data includes college students)

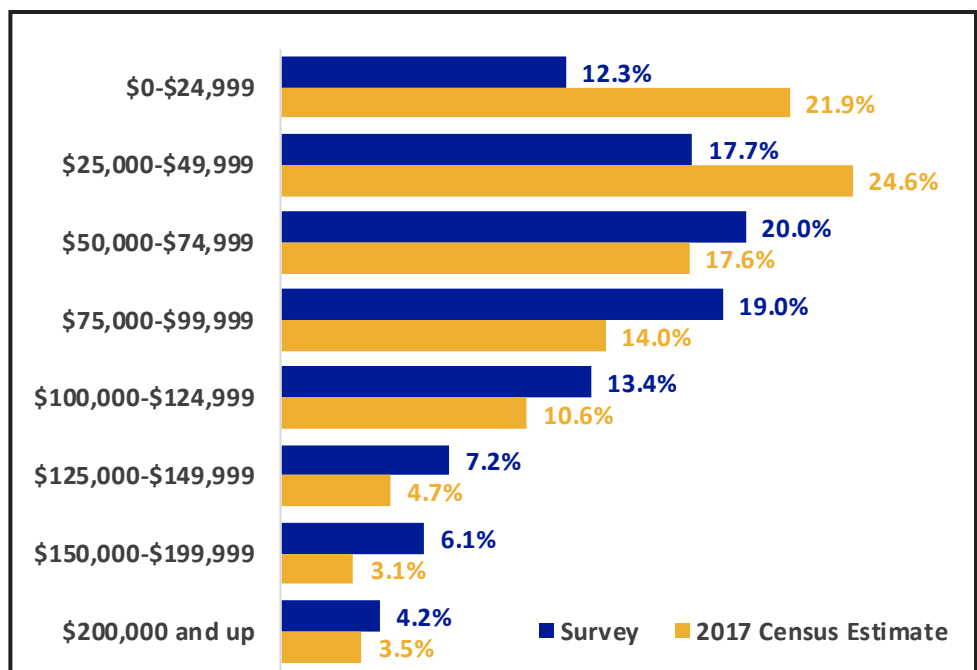
Q: What is your approximate average household income?

Audience: All
 Answered: 2,089 Skipped: 34

Summary

The three largest income categories were \$50,000-\$99,000 at 39%, less than \$50,000 at 30%, and \$100,000-\$149,999 at 20.6%. Participants were also given the option to select *Prefer not to answer*, 7.2% chose this option.

When compared to the 2017 Census estimates for Brookings County household income, participation was skewed toward the higher income brackets.





SUMMARY OF SURVEY RESULTS

Part Two

General Impressions about Brookings County



Q: What do you like most about Brookings?

Audience: All
 Answered: 1,476 Skipped: 647

Summary

Participants provided 2,887 responses, which were then categorized to show that comments related to *Small town feel*, *Friendly/welcoming* and *Safety/low crime* were the top three answers.

TOP 10

Responses (Total - 2,887)	#	%
Small town feel	268	9%
Friendly/welcoming	231	8%
Safety/low crime	217	8%
Appearance - clean, neat	157	5%
Overall size of community	142	5%
Available amenities	139	5%
People/residents	126	4%
Nature/parks/recreation options	122	4%
Events and activities	117	4%
Community attitude/character/charm	110	4%



Q: What improvements would you like to see Brookings make?

Audience: All
 Answered: 1,399 Skipped: 724

Summary

Participants provided 2,245 suggestions that were summarized into categories. *More shopping/retail options* was the most suggested improvement, followed by *Infrastructure/traffic/roads/snow removal* improvements.

TOP 10

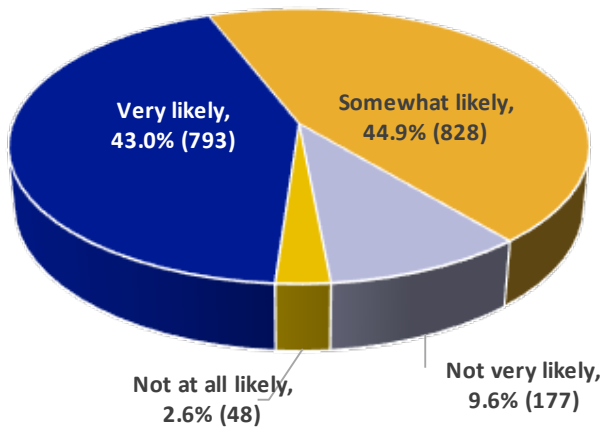
Responses (Total - 2,245)	#	%
More shopping/retail options	373	17%
Infrastructure/traffic/roads/snow removal	307	14%
More dining options	229	10%
Another grocery store	169	8%
More things to do	169	8%
Affordable housing options	114	5%
More activities for families	80	4%
Improved trails/sidewalks/bike paths	80	4%
Need for rec center/YMCA/indoor activities	60	3%
Development on the south side of town	51	2%

Q: How likely are you to encourage friends and family to move to Brookings County?

Audience: All
 Answered: 1,846 Skipped: 277

Summary

Results show that a majority (87.9%) of the survey participants were either *Somewhat likely* or *Very likely* to recommend Brookings County to their family and friends. Results were analyzed by category to identify any trends. *Retired* and *Young Family with Children* were the most likely to recommend Brookings, along with *Household Income \$75,000-\$99,999*. The percentage of participants who selected *Very likely* also increased the longer the participants have lived in Brookings County. No clear pattern emerged when sorting by education level.



Life Stage	#	Very likely	Somewhat likely	Not very/ Not at all likely
Young Adult/Student	243	30.9%	56.0%	13.2%
Early-Mid Career, No Children	244	39.8%	47.1%	13.1%
Young Family w/Children	579	49.1%	42.0%	9.0%
Adult with Older Dependent Children	319	37.6%	48.6%	13.8%
Mid-Late Career, No Children/Empty Nester	297	42.1%	42.4%	15.5%
Retired	152	55.9%	31.6%	12.5%

Participants were asked to provide reasons why they were not likely to encourage people to move to Brookings. The results of the 258 people who provided 384 reasons were then summarized, with *High housing/rent/property tax costs* receiving the most responses.

TOP 4

Reasons (Total - 384)	#	%
High cost for housing/rent/property taxes	76	20%
Not enough to do	50	13%
Lack of shopping/retail/dining options	37	10%
High cost of living	25	7%

Income Level	#	Very likely	Somewhat likely	Not very/ Not at all likely
\$0-\$24,999	194	31.4%	55.2%	13.4%
\$25,000-\$49,999	295	37.6%	47.8%	14.6%
\$50,000-\$74,999	355	38.0%	46.5%	15.5%
\$75,000-\$99,999	345	52.5%	38.8%	8.7%
\$100,000-\$149,999	356	48.9%	41.0%	10.1%
\$150,000-\$199,999	110	42.7%	47.3%	10.0%
\$200,000 and Over	69	49.3%	39.1%	11.6%

Tenure in Brookings County	#	Very likely	Somewhat likely	Not very/ Not at all likely
Less than 1 year	32	34.4%	50.0%	15.6%
1-3 years	141	39.1%	44.0%	17.0%
4-9 years	346	45.4%	46.0%	8.7%
10-19 years	400	45.5%	41.3%	13.3%
20 years or more	635	47.1%	41.9%	11.0%



SUMMARY OF SURVEY RESULTS

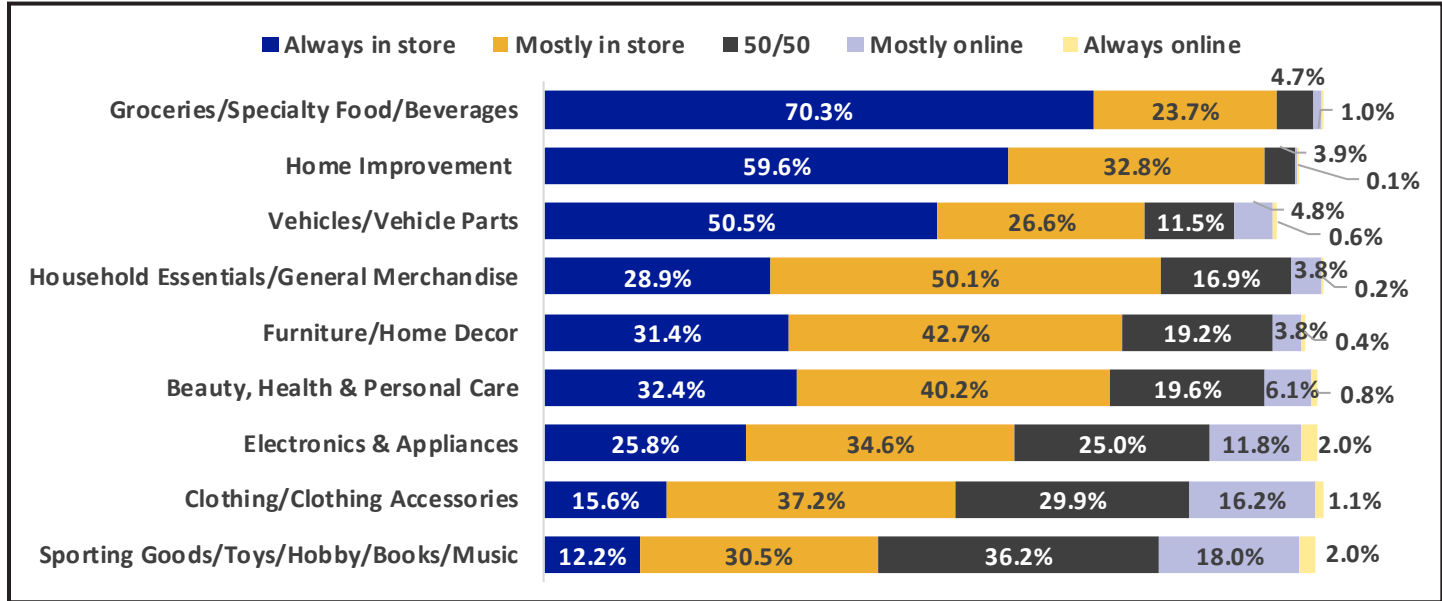
Part Three

Shopping and Dining Preferences

Q: How often do you shop in-store versus online?

Audience: All

Answered: 2,055 Skipped: 68



Summary

Participants indicated that they still shop mostly or always in-store for *Groceries/Specialty Food/Beverages* (94%) and *Home Improvement* (92.4%). The most prevalent categories for online shopping were *Sporting Goods/Toys/Hobby/Books/Music* and *Clothing/Clothing Accessories*, with participants marking mostly or always online 20% and 17.3% of the time, respectively. A “Not Applicable” choice was also provided but these results are not displayed in the above table.

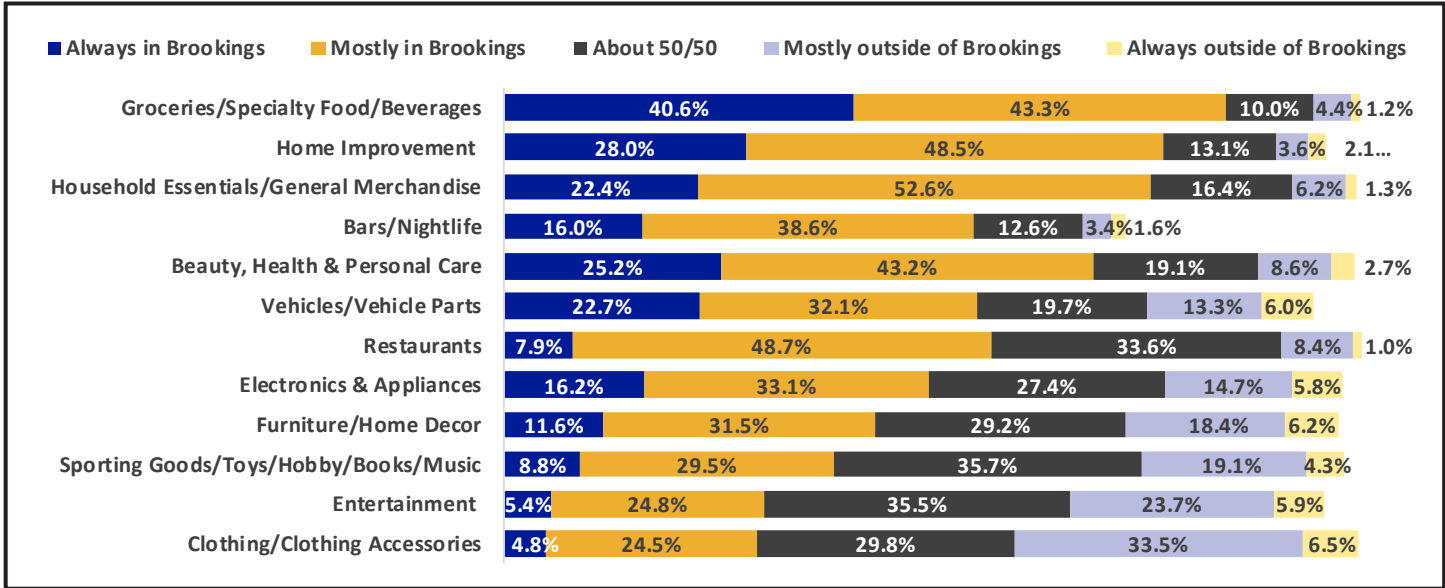
When analyzing online shopping by stage of life, *Young Family with Children* is the most likely to shop online followed by *Early-Mid Career, No Children*. *Retired* is the least likely to shop online. The top three online shopping categories overall also received the highest scores from every life stage. No clear pattern emerged when analyzing results by income level.

Mostly Online or Always Online	Young Adult/ Student	Early-Mid Career, No Children	Young Family with Children	Adult w/Older Dependent Children	Mid-Late Career, Empty Nester	Retired
Sporting Goods/Toys/Hobby/Books/Music	18.9%	24.1%	22.8%	19.5%	17.4%	11.7%
Clothing/Clothing Accessories	12.0%	23.7%	23.5%	12.4%	13.9%	8.7%
Electronics & Appliances	16.8%	17.9%	18.1%	11.0%	7.1%	4.1%

Q: When not shopping online, how often do you shop for and/or engage in these activities in Brookings County versus outside of Brookings County?

Audience: All

Answered: 1,986 Skipped: 137



Summary

Survey results show that participants are most likely to shop in Brookings County for *Groceries/Specialty Food/Beverages* (83.9%) followed by *Home Improvement* (76.5%) and *Household Essentials/General Merchandise* (75%). *Clothing/Clothing Accessories* was the most popular category for shopping outside of Brookings County, with 40% of participants selecting *Mostly outside* or *Always outside*. *Entertainment* at 29.6% came in second.

Stage of life analysis shows that *Young Adult/Student* is the most likely to shop outside of Brookings County while *Retired* is the least likely. The following table shows the results by stage of life for the top six categories for shopping outside of Brookings County. The percentages in blue represent the top three scores for each stage of life. No clear pattern emerged when analyzing results by income level.

Mostly or Always Outside of Brookings County	Young Adult/Student	Early-Mid Career, No Children	Young Family with Children	Adult w/Older Dependent Children	Mid-Late Career, Empty Nester	Retired
Clothing/Clothing Accessories	53.4%	39.2%	44.9%	34.2%	36.2%	20.4%
Entertainment	34.9%	33.8%	31.8%	30.4%	24.9%	11.9%
Furniture/Home Decor	34.5%	27.4%	29.0%	18.4%	20.1%	9.8%
Sporting Goods/Toys/Hobby/Books/Music	29.7%	27.8%	23.4%	23.9%	20.9%	11.1%
Electronics & Appliances	34.0%	25.6%	21.1%	16.3%	14.8%	9.3%
Vehicles/Vehicle Parts	26.5%	21.3%	16.6%	20.1%	20.0%	13.0%

Q: How many times do you go out to eat breakfast, lunch and/or dinner in Brookings County?

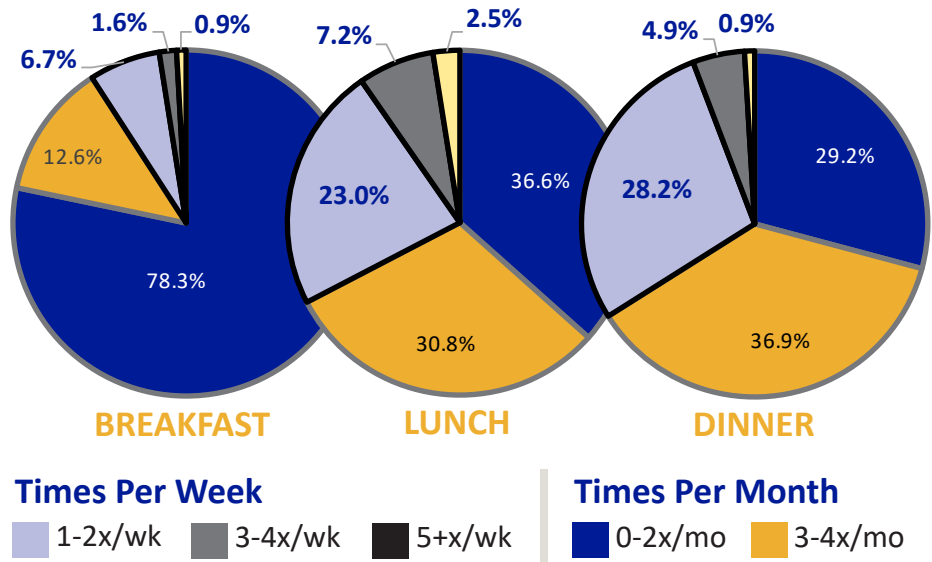
Audience: All
 Answered: 1,938 Skipped: 185

Summary

Dinner and Lunch were nearly tied as the most popular time to go out to eat, with participants selecting at least 1-2x/wk 34% of the time and 32.7% of the time, respectively.

Analysis by life stage shows *Young Adult/Student* and *Early-Mid Career, No Children* are more likely to go out for dinner than lunch. *Mid-Late Career, Empty Nester* is the most likely to go out for breakfast at least once a week, *Adult with Older Dependent Children* is the most likely to go out for lunch, and *Early-Mid Career, No Children* is the most likely to go out for dinner.

Somewhat surprisingly, analyzing the results by household income did not provide a clear pattern.



LIFE STAGE: Selected 1-2x/wk, 3-4x/wk or 5+x/week	Breakfast	Lunch	Dinner
Young Adult/Student	5.8%	29.0%	41.6%
Early-Mid Career, No Children	8.2%	33.7%	43.0%
Young Family with Children	8.9%	32.4%	31.2%
Adult with Older Dependent Children	7.6%	37.8%	35.6%
Mid-Late Career, Empty Nester	13.9%	31.8%	30.0%
Retired	9.9%	26.6%	20.4%
HOUSEHOLD INCOME: Selected 1-2x/wk, 3-4x/wk or 5+x/week	Breakfast	Lunch	Dinner
\$0-\$24,999	5.7%	29.3%	45.0%
\$25,000-\$49,999	11.0%	31.2%	35.9%
\$50,000-\$74,999	7.7%	30.1%	25.8%
\$75,000-\$99,999	8.3%	32.4%	26.7%
\$100,000-\$149,999	10.3%	36.2%	40.8%
\$150,000-\$199,999	9.9%	36.6%	36.9%
\$200,000 and up	16.7%	43.1%	43.1%

Q: If you choose to shop outside of Brookings County, please indicate the reasons why in order of importance from 1 being the most important to 5 being the least important.

Audience: All
 Answered: 1,955 Skipped: 168

Summary

The most popular reason for shopping outside of Brookings County is *Variety of stores*, followed by *Product availability/options*. Survey participants were then asked to provide other reasons they shop outside of Brookings County. Summarizing the 899 reasons provided by the 759 participants who responded, most reiterated their previous choices with *Variety/lack of store options* being the most popular reason (340 responses). *Being out of town for other reasons* was the second most popular reason.

Reason	Rank
Variety of stores	1
Product availability/options	2
Price/affordability	3
Overall experience (trip includes dining, other activities)	4
Convenience/ease of access	5

TOP 6

Other Reasons (Summarized)	Responses
Variety/lack of store options	340
Out of town for other reasons (such as visiting family & friends, doctor appointments, etc.)	159
Product availability	141
Price/affordability	100
Desire to shop at specific stores	96
Convenience - closer to home/ place of work	63

Q: If you choose to dine outside of Brookings County, please indicate the reasons why in order of importance from 1 being the most important to 6 being the least important?

Audience: All
 Answered: 1,829 Skipped: 294

Summary

The results were similar to the reasons provided for shopping outside of Brookings County, with the most popular reason for dining outside of Brookings County being *Restaurant type/variety* while *Convenience/ease of access* received the lowest rank. Survey participants were then asked to provide other reasons they dine outside of Brookings County. Of the 584 participants who responded, *Variety/lack of dining options* was the most popular reason given.

Reason	Rank
Restaurant type/variety	1
Quality	2
Overall experience (trip includes dining, other activities)	3
Dining atmosphere	4
Price/affordability	5
Convenience/ease of access	6

TOP 5

Other Reasons (Summarized)	Responses
Variety/lack of dining options	301
Out of town for other reasons (such as visiting family & friends, doctor appointments, etc.)	200
Dining closer to work/home	42
Overall experience/atmosphere	35
Price/affordability	24

Leakage/Online Sales

By combining the results based on participants selecting *Mostly/Always Online* and *Mostly/Always Outside of Brookings County*, the three most likely store categories to experience leakage outside of Brookings County and be susceptible to online sales are *Clothing/Clothing Accessories* (57.2%), *Sporting Goods/Toys/Hobby/Books/Music* (43.3%) and *Electronics & Appliances* (34.3%). The top three categories for each of the combined responses are highlighted in blue.

Category	Mostly/Always Online	Mostly/Always In-Store	Mostly/Always Outside of Brookings County	Mostly/Always Inside of Brookings County
Household Essentials/General Merchandise	4.0%	79.0%	7.4%	75.0%
Clothing/Clothing Accessories	17.2%	52.8%	40.0%	29.4%
Vehicles/Vehicle Parts	5.4%	77.1%	19.4%	54.9%
Home Improvement	0.4%	92.4%	5.7%	76.6%
Furniture/Home Decor	4.2%	74.1%	24.6%	43.0%
Groceries/Specialty Food/Beverages	1.1%	94.1%	5.6%	83.9%
Beauty, Health & Personal Care	6.8%	72.7%	11.3%	68.4%
Electronics & Appliances	13.7%	60.3%	20.6%	49.3%
Sporting Goods/Toys/Hobby/Books/Music	19.9%	42.7%	23.4%	38.3%
Restaurants			9.4%	56.5%
Bars/Nightlife			5.0%	54.5%
Entertainment			29.5%	30.2%

Restaurants

Filtering the results by stage of life, *Retired* was most likely to dine in Brookings County, while *Young Family with Children* was the least likely, however more than 50% of the participants at every life stage selected *Always in Brookings County* or *Mostly in Brookings County*.

Bars/Nightlife

Stage of life results show *Early-Mid Career, No Children* was the most likely to enjoy bars and nightlife in Brookings County versus outside of Brookings County and *Retired* was the least likely, although 41.1% of the retirees chose the “Not Applicable” option for this category.

Entertainment

Retired was most likely to select *Always in Brookings County* or *Mostly in Brookings County* for entertainment preferences while *Early-Mid Career, No Children* was the least likely.

Mostly or Always in Brookings County	Young Adult/Student	Early-Mid Career, No Children	Young Family with Children	Adult w/Older Dependent Children	Mid-Late Career, Empty Nester	Retired
Restaurants	58.2%	61.2%	52.3%	55.0%	56.5%	64.4%
Bars/Nightlife	56.7%	67.4%	55.1%	51.3%	48.4%	45.6%
Entertainment	24.9%	23.2%	24.7%	32.7%	36.9%	52.5%



RETAIL SALES BREAKOUT

The table below depicts results from a report analyzing the **potential** versus **estimated** retail sales of a defined trade area around Brookings. Potential sales are calculated by multiplying the number of households in that area by the average amount spent by households for retail goods and services. These figures are compared with the survey results showing the percentage of participants who shop *Mostly outside of Brookings County* or *Always outside of Brookings County* for that retail category. Further information about trade areas can be found on page 39.

One notable finding is 25.8% of all sales should come from *Motor Vehicle Parts & Dealers*, but only 14.6% is being captured, suggesting a retail “leakage”. In contrast, 38.7% of all estimated sales come from *Building Material, Garden Equip. & Supplies*, indicating a large retail “surplus”.

When considering the effect of retail leakage, it is also important to look at sales generated by each store category. For instance, while survey participants indicated *Clothing & Clothing Accessories* as the category they would most likely shop outside of Brookings County for, this category of retailer represents just 5.1% of the potential sales for the Brookings trade area.

Trade Area of 25 Mile Radius Around Brookings	Potential Sales	Estimated Sales	Difference	% of All Potential Sales	% of All Estimated Sales	Mostly or Always Outside of Brookings Cty
Motor Vehicle Parts & Dealers	\$177,433,164	\$ 95,329,308	(\$ 82,103,856)	25.8%	14.6%	19.4%
Food & Beverage	\$104,714,098	\$ 85,858,207	(\$ 18,855,891)	15.2%	13.2%	5.6%
General Merchandise	\$101,531,957	\$ 46,862,769	(\$ 54,669,188)	14.8%	7.2%	7.4%
Foodservice & Drinking Places	\$ 98,565,525	\$ 92,973,268	(\$ 5,592,257)	14.3%	14.3%	9.4%
Building Material, Garden Equip/Supplies	\$ 55,600,953	\$251,785,389	\$196,184,436	8.1%	38.7%	5.7%
Health & Personal Care	\$ 52,336,237	\$ 19,954,913	(\$ 32,381,324)	7.6%	3.1%	11.3%
Clothing & Clothing Accessories	\$ 34,914,212	\$ 11,648,377	(\$ 23,265,835)	5.1%	1.8%	40.0%
Miscellaneous Store Retailers	\$ 20,361,509	\$ 9,540,900	(\$ 10,820,609)	3.0%	1.5%	NA
Furniture & Home Furnishings	\$ 16,535,841	\$ 22,588,521	\$ 6,052,680	2.4%	3.5%	24.6%
Electronics & Appliances	\$ 14,134,686	\$ 5,552,298	(\$ 8,582,388)	2.1%	0.9%	20.6%
Sporting Goods, Hobby, Books, Music	\$ 11,733,046	\$ 8,889,602	(\$ 2,843,444)	1.7%	1.4%	23.4%
TOTAL	\$687,861,228	\$650,983,552	(\$ 36,877,676)			

• Source: Retail Leakage and Surplus Analysis, Buxton 2018 - 25 mile radius around Brookings (See Appendix C)

RETAIL LEAKAGE

Local residents are spending more for products than local businesses capture - they are shopping OUTSIDE the trade area. While there is unmet demand for those products, there could also be a strong competitor outside the trade area that dominates the market for that product.

RETAIL SURPLUS

The trade area is capturing the local market PLUS non-local shoppers. A surplus could be the result of a popular retail store within the trade area or a strong cluster of stores with broad geographic appeal within a specific retail category, drawing customers in for destination retail shopping.

Q: Please indicate your interest in seeing more of these types of establishments in Brookings County.

Audience: All

Answered: 1,906 Skipped: 217

Summary

Participants were asked to indicate whether they were *Very interested*, *Somewhat interested*, *Neutral*, *Not very interested* or *Not at all interested* in seeing more of several categories of stores. *Restaurants - Family* garnered the highest interest from participants, followed closely by *Clothing/Clothing Accessories* and *Groceries/Specialty Food/Beverages*. Meanwhile, *Bars/Nightlife*, *Vehicles/Vehicle Parts* and *Home Improvement* received the highest number of participants selecting *Not very interested* or *Not at all interested*.

Participants were given the opportunity to list other types of stores they were interested in seeing in Brookings County. Of the 129 people who provided a total of 153 different suggestions, the top two responses were the name of a *specific store* (19.6%) and additional *sports/recreation/entertainment options* (19%).

Category	Very or Somewhat Interested	Not Very or Not At All Interested
Restaurants - Family	85.1%	3.8%
Clothing/Clothing Accessories	84.8%	4.1%
Groceries/Specialty Food/Beverages	81.6%	6.1%
Restaurants - Fine Dining	71.9%	9.6%
Household Essentials/General Merchandise	67.2%	8.5%
Sporting Goods/Toys/Hobby/Books/Music	64.8%	10.1%
Furniture/Home Decor	60.6%	12.8%
Beauty, Health & Personal Care	48.4%	16.9%
Electronics & Appliances	44.8%	17.4%
Home Improvement	37.6%	25.6%
Bars/Nightlife	30.3%	40.2%
Vehicles/Vehicle Parts	19.2%	33.5%

TOP 5

Other Suggestions (153)	#	%
Specific store requested	30	19.6%
Sports, recreation or entertainment options	29	19.0%
Additional grocery store	22	14.4%
Additional restaurants	20	13.1%
Additional clothing stores	8	5.2%

Q: If you could bring one new retailer and/or restaurant to Brookings, what would be your top choice?

Audience: All

Retailer: Answered: 1,640 Skipped: 483

Restaurant: Answered: 1,560 Skipped: 563

Summary

Participants were eager to provide their suggestions, with 77% offering retailer suggestions and 73% offering restaurant suggestions. The answers included both specific stores and restaurants and more general requests, such as “another grocery store” and “a steakhouse”. Some participants also provided more than one suggestion in their responses. The top responses are shown here, in both the specific and general categories.

In the “Retailer” category, *Target* was specifically named the most by far with 854 suggestions (47% of the total) while *Big Box/Discount/Super Store* was the most requested category (905 or 50% of the total). *Olive Garden* was the most mentioned restaurant (208) followed by *Panera Bread* (124). *Ethnic Food* was the most requested category (518 or 31% of the total), with *Italian* being the most popular type of ethnic restaurant receiving 53% of those 518 suggestions.

RETAILER (1,818 Suggestions)

TOP 10

Retailer	#
Target	854
Aldi	146
Kohl's	107
Menards	43
Hobby Lobby	37
TJ Maxx	36
Trader Joe's	34
Scheels	33
Fareway	28
Costco	17

TOP 5

Retailer Type	%
Big Box/Discount/Super Store	50%
Clothing/Department Store	17%
Grocery Store	17%
Outdoor/Sports	4%
Home Improvement	3%

RESTAURANT (1,692 Suggestions)

TOP 10

Restaurant Name	#
Olive Garden	208
Panera Bread	124
Texas Roadhouse	107
HuHot Mongolian Grill	106
Noodles & Company	62
Wendy's	47
Red Lobster	46
Five Guys	37
Chick-fil-A	33
Outback Steakhouse	28

TOP 5

Restaurant Type	%
Ethnic	31%
Casual/Family-Friendly	20%
Casual (with alcohol)	12%
Fast Food	10%
Steakhouse	7%

The Role of Consumer Demand in the Retail Recruitment Process

While it is important that residents of a community show an interest in a particular store or restaurant, consumer demand is only one of several criteria that retailers use to determine new locations. Further information about the retail site selection process is provided on page 39.



SUMMARY OF SURVEY RESULTS

Part Four

Characteristics of Selected Populations

This section provides further analysis on four groups of survey participants: *Outbound Commuters*, *Young Adults/Students*, *Young Families with Children* and *Retirees*. These participants represent key economic development initiatives currently underway related to community growth and workforce development. Data analysis on other survey categories is available upon request.

Outbound Commuters

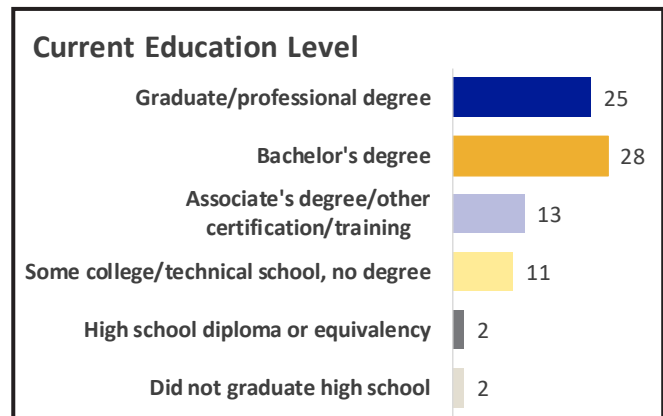
The survey included questions asked specifically to those people who work outside of Brookings County in order to gather more information about these commuters. For the results shown below, individuals who indicated they lived outside of Brookings County or were college students living on or off campus are excluded from the graphs and summaries.

A total of 81 survey participants make up the *Outbound Commuters* category. While this is a small representation, the findings suggest commuters are from all stages of life and hold a variety of different types of jobs. Further research may be warranted to determine if this group provides a possible supply source for Brookings County workforce.

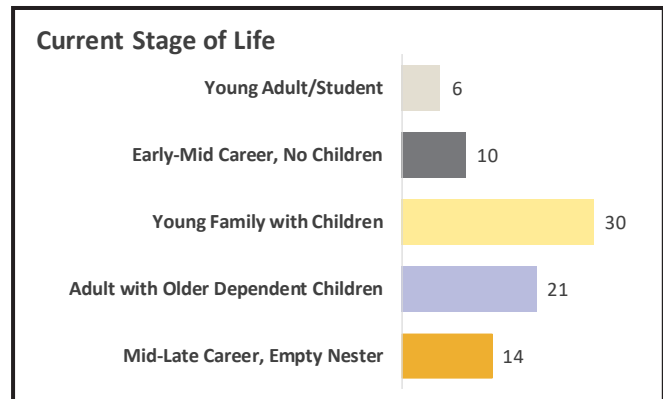
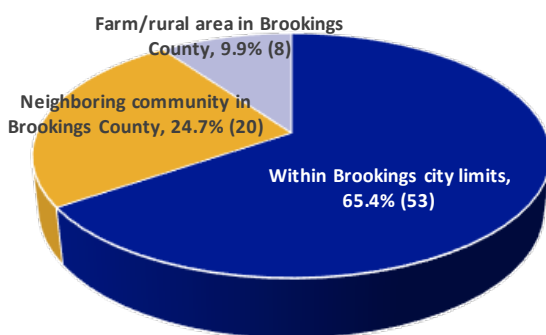
General Characteristics

Summary

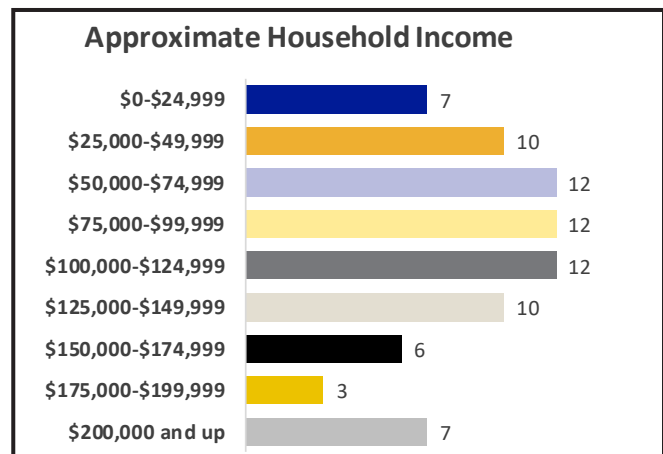
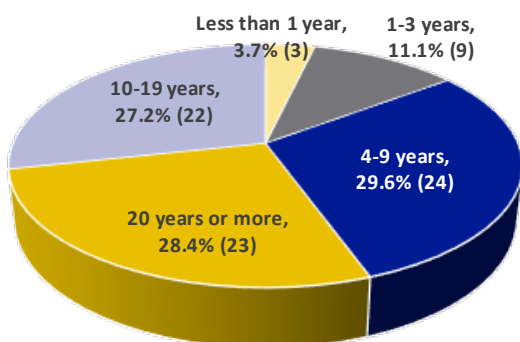
A majority (65.4%) of the commuters live within the Brookings city limits and slightly more than half (55.6%) have lived in Brookings for at least 10 years. Most (83.9%) have full-time jobs and have some post secondary education, with 65.4% holding at minimum a bachelor's degree. Families with dependent children represent 63% of the commuters. Household income levels are fairly equally distributed among all commuters.



Where do you currently live?



How many years have you lived in Brookings County?



Q: Please choose the option that best describes your current job.

Summary

Several categories were available to choose from, in addition to providing an *Other* option. *Manager/administrator/consultant* was the most popular category behind the *Other* option at 21.3%. Additional jobs specified ranged greatly and included professional, skilled, customer service and general labor positions.

Current Job	#	%
Manager/administrator/consultant	17	21.3%
Medical professional	11	13.8%
Professor/teacher	11	13.8%
Science/technology/research	8	10.0%
Self-employed	6	7.5%
Office/clerical	2	2.5%
Skilled trades	1	1.3%
Customer service	1	1.3%
Other	23	28.8%

Q: Why do you choose to work outside of Brookings County?

Summary

Commuters provided 85 answers which were summarized to show the top three reasons: *Limited options in Brookings* (36.5%), *Job/customer location* (27.1%) and *Higher pay/better benefits* (14.1%).

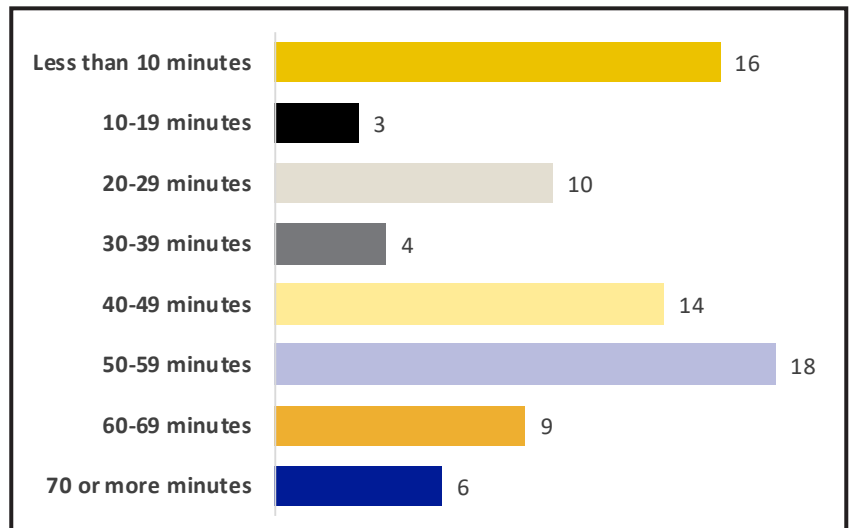
Q: How long is your daily commute to work?

Summary

The results show that 58.8% of the respondents travel 40 minutes or more to work. Further analysis of these 47 participants shows that 41 are commuting for full-time jobs. Job category breakout for this group is as follows:

Job Type (Commute = 40+ Minutes)	#
Manager/administrator/consultant	11
Medical professional	8
Science/technology/research	6
Professor/teacher	4
Office/clerical	2
Self-employed	2
Skilled trades	1
Other	13

Other jobs specified included: *skilled* (3), *military* (2), *government/non-profit* (2), *professional* (2), *office* (2), *agriculture and service*.





Young Adults/Students

One of the strategies for workforce development involves gaining a better understanding of young adults and students in order to develop programs and amenities that will help retain them in Brookings County. A total of 299 survey participants make up the *Young Adult/Student* category.

A majority of the participants at this life stage are working at least part-time within Brookings city limits and have a household income of less than \$50,000. They are interested in seeing more clothing stores, family restaurants and grocery stores in Brookings County. This group was the least inclined of all life stages to select *Very likely* to encourage family and friends to move here and are more likely to go out to dinner versus lunch. They would like to see improvements to roads, snow removal processes and infrastructure and enjoy the small town atmosphere and many amenities Brookings offers.

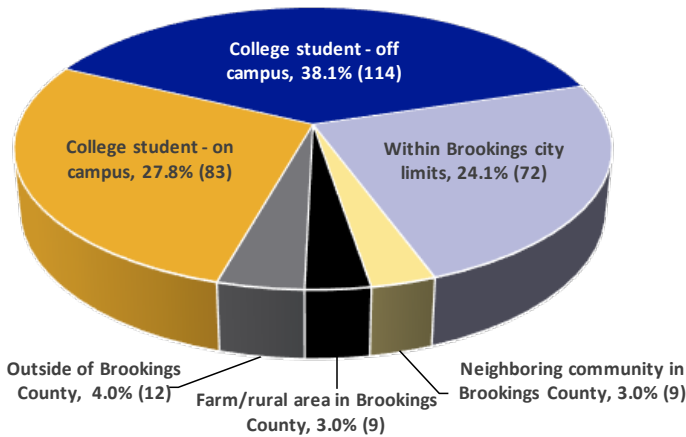


General Characteristics

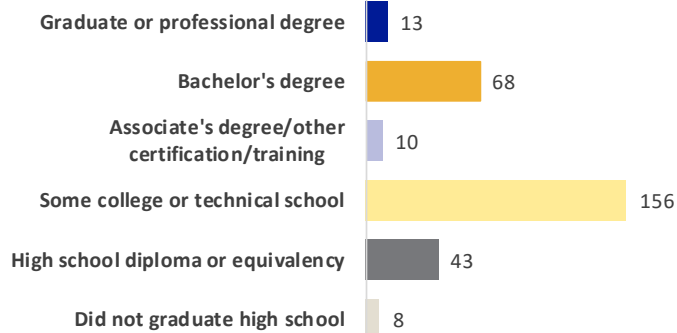
Summary

A majority (65.9%) of the *Young Adult/Student* survey participants indicated they were college students living on or off campus and all but 12 (4%) live within Brookings County. Regarding employment status, 58.2% of all participants in this category hold part-time jobs while 19.1% have full-time jobs. Most (88.2%) of the 68 participants who are unemployed are college students. All but 12.5% of the participants work within Brookings County. When asked to indicate their current education level, 30.5% have at minimum an associate's degree or other certification/training. Income data shows that 84.8% of those who provided a response reported an average household income of less than \$50,000.

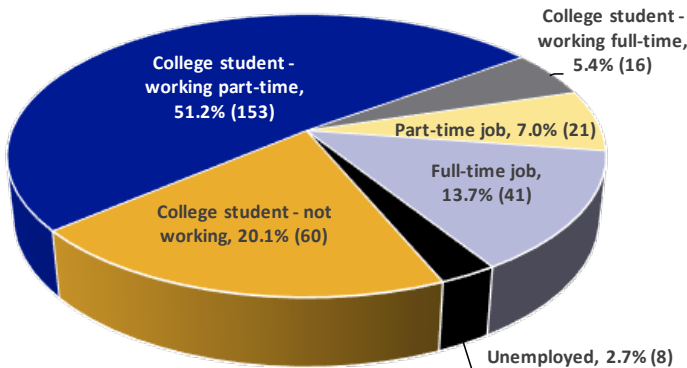
Where do you currently live?



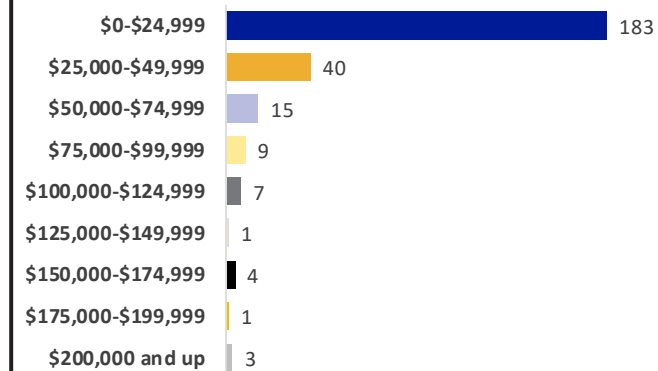
Current Education Level



Current Employment Status



Approximate Household Income



Shopping & Dining Preferences

Summary

Participants were asked to select whether they shopped *Always in-store*, *Mostly in-store*, *50/50*, *Mostly online* and *Always online* in addition to a not applicable option. Similar choices were provided when asked if the participants shopped in or outside of Brookings County when not shopping online. The summarized results below show the top three answers in each category highlighted in blue. Key findings include:

- *Clothing/Clothing Accessories*, *Electronics & Appliances* and *Sporting Goods/Toys/Hobby/Books/Music* are the most likely store categories to experience leakage outside of Brookings County and be susceptible to online sales.
- The most popular reason for shopping outside of Brookings County was *Variety of stores* while the most popular reason for dining outside of Brookings County was *Restaurant type/variety*.
- Regarding how often they eat out in Brookings County on a weekly basis, 5.8% go out for breakfast at least once a week, 29% for lunch and 41.6% for dinner.
- 60.8% indicated they were *Very interested* in seeing more *Clothing/Clothing Accessories* stores in Brookings. The second most popular category was *Restaurants - Family* with 50.8% choosing *Very interested*.

Category	Mostly/Always Online	Mostly/Always In-Store	Mostly/Always Outside of Brookings County	Mostly/Always Inside of Brookings County
Household Essentials/General Merchandise	3.4%	82.5%	10.8%	64.3%
Clothing/Clothing Accessories	12.0%	49.5%	53.4%	17.9%
Vehicles/Vehicle Parts	5.5%	67.5%	26.5%	35.1%
Home Improvement	0.0%	83.9%	16.4%	49.1%
Furniture/Home Decor	4.1%	62.2%	34.5%	27.3%
Groceries/Specialty Food/Beverages	0.0%	96.2%	6.7%	79.4%
Beauty, Health & Personal Care	5.5%	72.4%	21.7%	49.4%
Electronics & Appliances	16.8%	50.9%	34.0%	29.1%
Sporting Goods/Toys/Hobby/Books/Music	18.9%	39.9%	29.7%	30.1%
Restaurants			7.8%	58.2%
Bars/Nightlife			4.1%	56.7%
Entertainment			34.9%	24.9%

General Impressions about Brookings County

Summary

With only 30.9% selecting *Very likely*, this population was the least likely to encourage family and friends to move to Brookings County. Of the 31 reasons provided by participants pertaining to why they weren't likely to encourage their family and friends to move here, comments related to *Not enough to do* were the most popular (25.8%, 8 total), followed by *No job opportunities* and *Don't want to live in a college town* both receiving 12.9% or 4 of the total responses. Other findings include:

- Top requested improvements (229 total): *Infrastructure/traffic/roads/snow removal* (74), *More shopping/retail options* (38), *More things to do* (34), *More dining options* (31).
- Favorite features (290 total): *Atmosphere/small town feel* (78), *People/friendly/welcoming/accepting* (47), and *Size* (26). When summarizing the answers, a common theme of "big city amenities, small town feel" emerged.

Young Families with Children

Communities in the Midwest need to be able to attract and keep young families if they want to remain vibrant and sustainable. Understanding the needs of this life stage will help Brookings County ensure that these individuals stay here, providing workers for businesses and helping grow the overall population. At 30.1% of all survey participants (640 total), this life stage was the largest represented by the survey results.

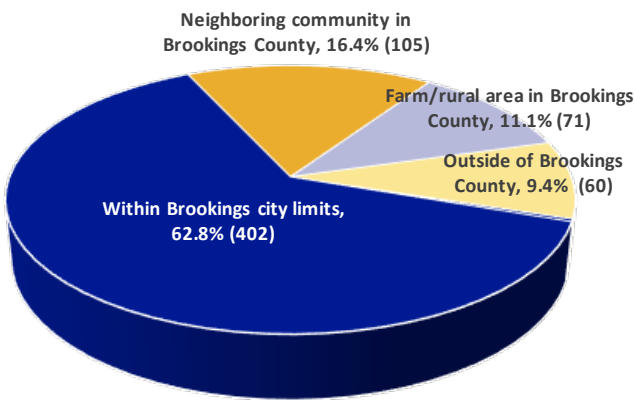
A majority (83.6%) of the participants at this life stage are working full-time while 10.3% work part-time. They are educated, middle-income families who would like to see more family-style restaurants and grocery stores in Brookings. This group had a very favorable opinion of Brookings County, with the lowest percentage of all life stages (9%) to select *Not very likely* or *Not at all likely* to encourage family and friends to move here. They would like to see more shopping/retail options and more things to do but enjoy the small town atmosphere, the friendly, welcoming people and many amenities Brookings offers.

General Characteristics

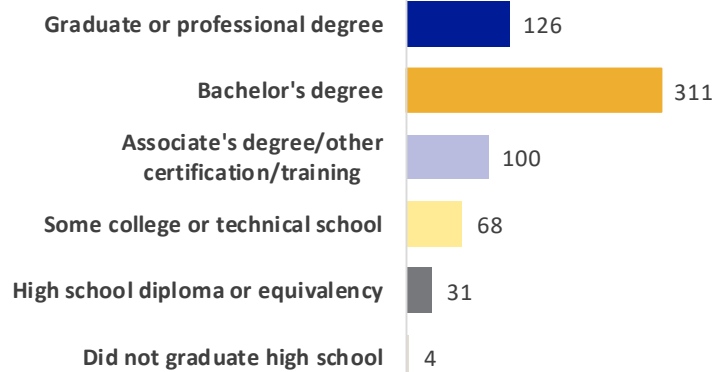
Summary

Only 9.4% of the *Young Family with Children* survey participants live outside of Brookings County and all but 11.8% work within Brookings city limits. Over half (54.5%) have lived in Brookings County for 10 years or more. This group is very educated, with 68.3% having at least a bachelor's degree. Nearly half (49.1%) have a household income between \$50,000-\$99,999.

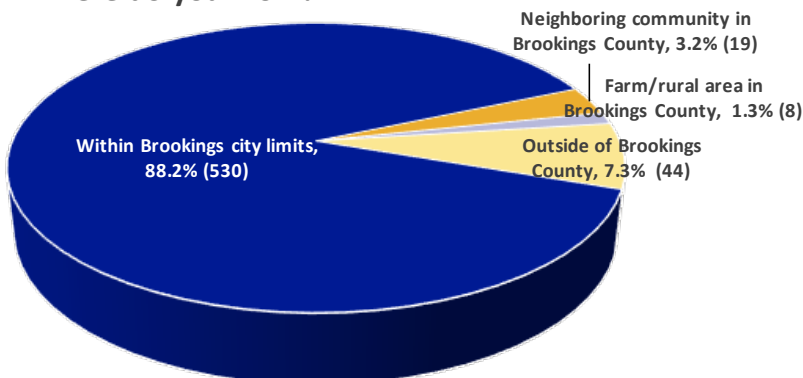
Where do you currently live?



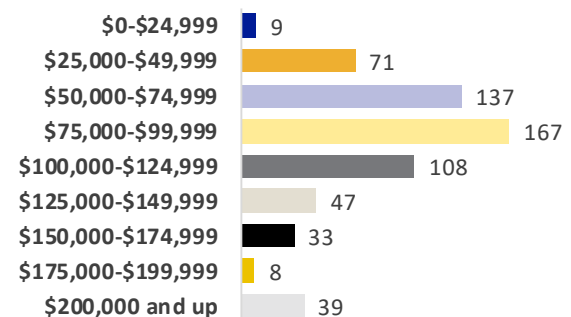
Current Education Level



Where do you work?



Approximate Household Income



Shopping & Dining Preferences

Summary

The summarized results below show the top three answers in each category highlighted in blue for shopping in-store versus online as well as in Brookings County versus outside of Brookings County. Other key findings include:

- *Clothing/Clothing Accessories* and *Sporting Goods/Toys/Hobby/Books/Music* are the most likely store categories to experience leakage outside of Brookings County and be susceptible to online sales.
- The most popular reason for shopping outside of Brookings County was *Variety of stores* followed closely by *Product availability/options* while the most popular reason for dining outside of Brookings County was *Restaurant type/variety*.
- Regarding how often they eat out in Brookings County on a weekly basis, 8.9% chose at least once a week for breakfast, 32.4% for lunch and 31.2% for dinner.
- 68% indicated they were *Very interested* in seeing more *Restaurants - Family* in Brookings. The second most popular category was *Groceries/Specialty Food/Beverages* with 60.2% choosing *Very interested* followed closely by *Clothing/Clothing Accessories* at 58.2%.

Category	Mostly/Always Online	Mostly/Always In-Store	Mostly/Always Outside of Brookings County	Mostly/Always Inside of Brookings County
Household Essentials/General Merchandise	6.0%	70.5%	7.9%	74.7%
Clothing/Clothing Accessories	23.5%	43.7%	44.9%	25.7%
Vehicles/Vehicle Parts	6.2%	74.0%	16.6%	57.9%
Home Improvement	0.5%	92.4%	3.9%	82.3%
Furniture/Home Decor	6.5%	67.5%	29.0%	36.4%
Groceries/Specialty Food/Beverages	1.7%	90.7%	6.2%	81.5%
Beauty, Health & Personal Care	10.2%	65.2%	10.8%	66.5%
Electronics & Appliances	18.1%	52.9%	21.1%	46.1%
Sporting Goods/Toys/Hobby/Books/Music	22.8%	36.6%	23.4%	37.4%
Restaurants			9.8%	52.3%
Bars/Nightlife			4.1%	55.1%
Entertainment			31.8%	24.7%

General Impressions about Brookings County

Summary

This life stage had the lowest percentage of participants (9%) to select *Not very likely* or *Not at all likely* when asked if they would encourage friends and family to move to Brookings County. Of the 103 reasons provided by participants pertaining to why they weren't likely to encourage their family and friends to move here, comments related to *High housing/rent/property tax costs* and *High cost of living* were the most noted (36, 35%), followed by *Not enough to do* receiving 12.6% (13) of the responses. Other findings include:

- Top requested improvements (753 total): *More shopping/retail options* (131), *More things to do* (89), *Infrastructure/traffic/roads/snow removal* (81) and *More dining options* (79). Specifically related to *More things to do*, activities for families/children/teens was specified 73% of the time.
- Favorite features (906 total): *Atmosphere/small town feel* (127), *People/friendly/welcoming/accepting* (98) and *Things to do* (82).

Retirees

University communities are seen as a popular option for baby boomers, the most educated generation yet to retire. Retiree households bring new money into a community and help build and grow the local economy. Retirees can also offer a potential workforce supply source, with many choosing to work part-time. In addition, retirees can serve as mentors to businesses and entrepreneurs. An understanding of this population will help develop strategies to retain existing residents when they retire as well as position Brookings as a destination for SDSU alumni, South Dakota residents and others seeking the ideal retirement community. A total of 178 survey participants make up the *Retired* life stage category.

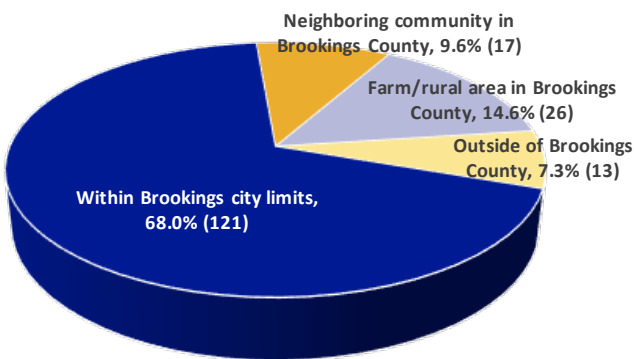
A majority of the retirees have lived within Brookings city limits for 20 years or more. They are the most likely life stage to select *Very likely* to encourage family and friends to move here but would like to see improvements to roads, snow removal and infrastructure as well as more shopping and retail options. Retirees are interested in seeing more *Groceries/Specialty Food/Beverage Stores* in Brookings County. They are slightly more likely to go out to eat for lunch versus dinner and they are the most likely of all life stages to dine in Brookings County. Retirees are also the least likely to shop online and the least likely to shop outside of Brookings County. Their favorite feature of Brookings is the friendly, welcoming people.

General Characteristics

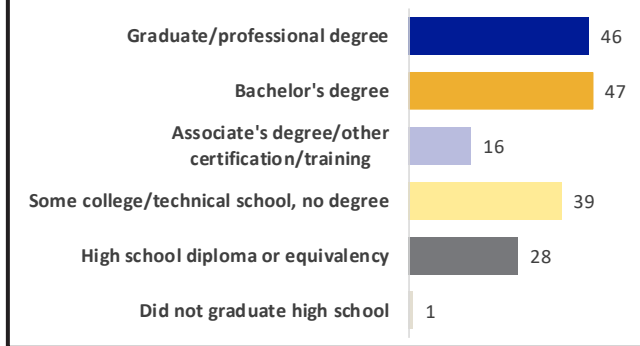
Summary

Only 7.3% of the *Retired* survey participants live outside of Brookings County. A majority (75%) who live inside of Brookings County have lived here 20 years or more. About half (52.5%) hold at minimum a bachelor's degree. Household income data shows that 69.4% of the retirees who responded selected income levels between \$25,000-\$99,999, while 34 participants (19.1%) chose not to answer this question.

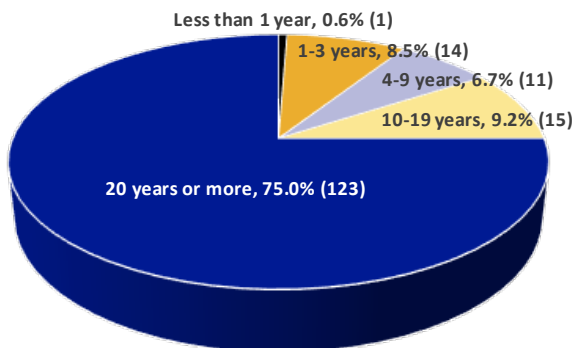
Where do you currently live?



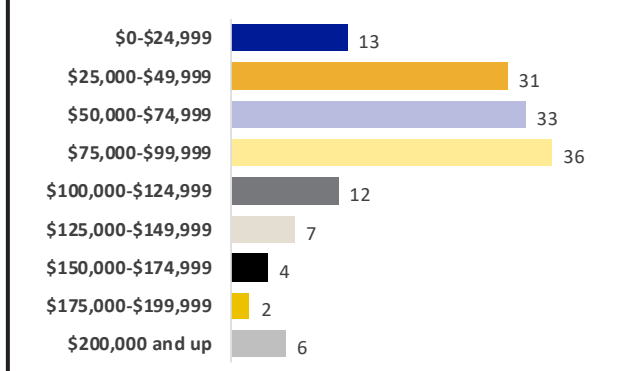
Current Education Level



How many years have you lived in Brookings County?



Approximate Household Income



Shopping & Dining Preferences

Summary

The summarized results below show the top three answers in each category highlighted in blue for shopping in-store versus online and in Brookings County versus outside of Brookings County. Other key findings include:

- *Clothing/Clothing Accessories, Sporting Goods/Toys/Hobby/Books/Music* and *Vehicles/Vehicle Parts* are the most likely categories to experience leakage outside of Brookings County and be susceptible to online sales.
- The most popular reason for shopping outside of Brookings County was *Product availability/options* while the most popular reason for dining outside of Brookings County was *Restaurant type/variety*. While *Overall experience* ranked 4th for all combined life stages, it was the second most popular reason for this group.
- Regarding how often they eat out on a weekly basis in Brookings County, 9.9% selected at least once a week for breakfast, 26.6% for lunch and 20.4% for dinner.
- 70.4% indicated they were *Very interested* in seeing more *Groceries/Specialty Food/Beverage Stores* in Brookings. The second most popular category was *Clothing/Clothing Accessories* with 62.4% choosing *Very interested*.

Category	Mostly/Always Online	Mostly/Always In-Store	Mostly/Always Outside of Brookings County	Mostly/Always Inside of Brookings County
Household Essentials/General Merchandise	1.7%	89.0%	3.7%	82.2%
Clothing/Clothing Accessories	8.7%	74.4%	20.4%	50.0%
Vehicles/Vehicle Parts	3.5%	87.1%	13.0%	66.1%
Home Improvement	0.6%	94.2%	4.9%	83.3%
Furniture/Home Decor	1.2%	90.6%	9.8%	69.3%
Groceries/Specialty Food/Beverages	1.2%	98.8%	5.5%	87.7%
Beauty, Health & Personal Care	1.7%	87.2%	5.6%	83.3%
Electronics & Appliances	4.1%	82.5%	9.3%	67.1%
Sporting Goods/Toys/Hobby/Books/Music	11.7%	60.8%	11.1%	52.2%
Restaurants			6.7%	64.4%
Bars/Nightlife			3.8%	45.6%
Entertainment			11.9%	52.2%

General Impressions about Brookings County

Summary

At 55.9%, this population was the most likely to select *Very likely* to encourage family and friends to move to Brookings County. Of the 29 reasons provided by participants pertaining to why they weren't likely to encourage their family and friends to move here, comments related to *High cost of living and high housing/rental costs* were the most popular (7 - 24.1%), followed by *No job opportunities*, *Not enough to do* and *Weather* all receiving 10.3% or 3 responses each. Other findings include:

- Top requested improvements (189 total): *Infrastructure/traffic/roads/snow removal* (36), *More shopping/retail options* (30) and *Another grocery store* (23).
- Favorite features (263 total): Responses related to *People/friendly/welcoming/accepting* (54) were the most common, followed by *Things to do* (30) and *SDSU and SDSU related amenities* (26).



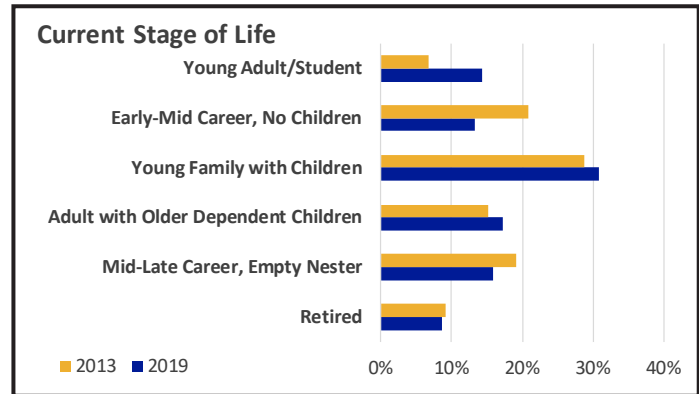
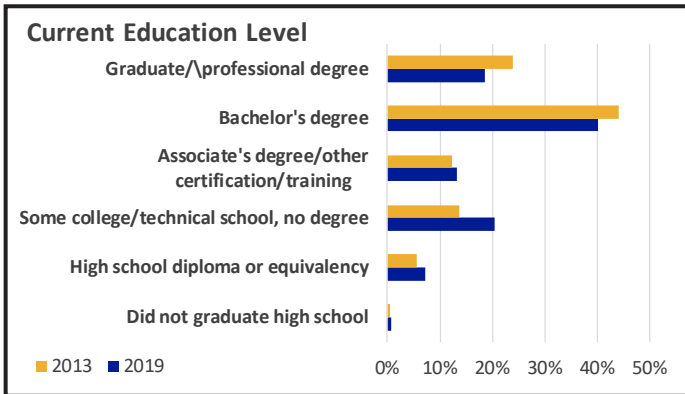
2013 COMMUNITY SURVEY COMPARISON

The 2013 Brookings Area Community Survey was completed by 1,076 participants. Similar to the 2019 survey, sections on shopping and dining preferences and overall impressions of living in Brookings were included. The following pages provide a comparison of the comparable questions included in both surveys. For complete 2013 survey results, see *Appendix D*.

2013 Community Survey Comparison

Summary and Participation

The Brookings Area Community Survey was available online and in print form from 10/29/13 through 11/12/13 and 1,076 responses were received. Although the questions were not identical to the 2019 survey, some trends can be identified. General characteristics of the 2013 participants and the 2019 participants are shown below.



Shopping & Dining Preferences

Shopping and Dining Outside of Brookings County

When asked to select the reasons why participants choose to shop outside of Brookings County, both the 2013 and 2019 survey results show the same top two reasons: *Variety of stores* and *Product availability/options*. Reasons for dining outside of Brookings County also remained the same, with *Restaurant type/variety* and *Quality* earning the top two spots in both surveys.

Requested Retailers and Restaurants

Participants were asked in both surveys to provide suggestions for the types of stores and restaurants they would like to see in Brookings. The top spots for retailer (*Target*) and restaurant (*Olive Garden*) remained the same. *Ethnic* replaced *Casual/Family-Friendly* as the most requested type of restaurant.

REQUESTED RETAILERS

Name - 2013	TOP 5	Name - 2019
Target		Target
Kohl's		Aldi
Shopko		Kohl's
Menards		Menards
Best Buy		Hobby Lobby

Type - 2013	Type - 2019
Big Box/Discount	Big Box/Discount
Clothing/Dept Store	Clothing/Dept Store
Grocery Store	Grocery Store
Home Improvement	Outdoor/Sports
Outdoor/Sports	Home Improvement

REQUESTED RESTAURANTS

Name - 2013	TOP 5	Name - 2019
Olive Garden		Olive Garden
Taco Bell		Panera Bread
Red Lobster		Texas Roadhouse
Panera Bread		HuHot
Wendy's		Noodles & Co

Type - 2013	Type - 2019
Casual/Family-Friendly	Ethnic
Ethnic	Casual/Family-Friendly
Fast Food	Casual (with alcohol)
Seafood	Fast Food
Casual (with alcohol)	Steakhouse

General Impressions about Brookings County

2013

How proud are you to live in Brookings?

Life Stage	#	Extremely/ Quite proud	Moderately proud	Slightly/ Not at all proud
Young Adult/Student	63	49.2%	27.0%	23.8%
Early-Mid Career, No Children	196	50.5%	26.5%	23.0%
Young Family with Children	270	59.2%	28.9%	11.9%
Adult with Older Dependent Children	138	55.8%	27.5%	16.7%
Mid-Late Career, No Children/Empty Nester	185	63.8%	24.9%	11.3%
Retired	88	73.8%	19.3%	6.8%

2019

How likely are you to encourage friends & family to move to Brookings County?

Life Stage	#	Very likely	Somewhat likely	Not very/ Not at all likely
Young Adult/Student	243	30.9%	56.0%	13.2%
Early-Mid Career, No Children	244	39.8%	47.1%	13.1%
Young Family with Children	579	49.1%	42.0%	9.0%
Adult with Older Dependent Children	319	37.6%	48.6%	13.8%
Mid-Late Career, No Children/Empty Nester	297	42.1%	42.4%	15.5%
Retired	152	55.9%	31.6%	12.5%

Findings

The 2013 survey results showed *Retired* as the most likely to be *Extremely Proud* or *Quite Proud* of Brookings while the 2019 survey showed *Young Family with Children* selected *Very likely* or *Somewhat likely* to encourage their family and friends to move to Brookings County the most of all life stages (91.1%) followed closely by *Retired* at 87.5%. While *Mid-Late Career, No Children/Empty Nester* was the second most likely life stage to say they were *Extremely proud* or *Quite proud* of Brookings in 2013, the 2019 survey shows this group as the most likely to mark *Not very likely* or *Not at all likely* to encourage family and friends to move here.

What do you like the most?

TOP 5

2013 Responses	#
People/friendly/welcoming	216
Size/small town feel/quality of life	196
Safety/low crime/quiet/peaceful	126
Available amenities/events/activities	112
SDSU/SDSU activities	104

2019 Responses	#
Size/small town feel/quality of life	440
People/friendly/welcoming	357
Safety/low crime/quiet/peaceful	277
Available amenities/events/activities	256
Appearance - clean, neat	157

What improvements would you like to see?

TOP 4

2013 Responses	#
More shopping/retail/grocery/dining options	260
Infrastructure/traffic/roads/snow removal	151
Affordable housing/rentals/zoning issues	120
More things to do	70

2019 Responses	#
More shopping/retail/grocery/dining options	771
Infrastructure/traffic/roads/snow removal	307
More things to do	169
Affordable housing/rentals/zoning issues	138

Suggested improvements in the 2019 survey matched fairly closely with the 2013 survey, as did comments related to what the survey participants liked the most. One notable difference was *SDSU/SDSU activities* being in the top 5 in 2013 but not in 2019. In 2013, the number of people responding to suggested improvements and what they liked the most was almost equal (675 and 680 respectively or 63% of participants). In the 2019 survey, 77 more people (69%) provided a response for what they liked the most versus providing suggesting for improvements.



FUNDAMENTALS OF RETAIL RECRUITMENT

Site Selection Process and Brookings Market Challenges

When deciding whether to open a new store or restaurant in a community, each retailer has its own set of criteria. This section provides a brief outline of the site selection process and some of the challenges that Brookings faces.

RETAIL SITE SELECTION PROCESS

1. Identify and prioritize new market areas

- **Consumers** - What are their shopping behaviors?
- **Competition** - Is there sufficient unmet demand?
- **Economies of Scale** - Is there potential for multiple stores?
- **Supply Chain** - How close are existing stores?

A market area is a geographical region that can have several trade areas. Retailers determine new market areas by either looking at economic strength indicators (population growth, employment rates, real estate activity, consumer spending, etc.) or identifying potential trade areas within a certain geography that meet their desired criteria. The more trade areas there are, the better the opportunity.



2. Identify trade areas with best potential in each market area

- **Performance Estimates** - What are the projected sales?
- **Cannibalization** - Will a new store take away sales from an existing store within the market area?
- **Potential Customers** - Is there a high concentration of the right types of consumers?
- **Competition** - Who is already in the trade area?

A trade area is the geographic area that a retail store draws from - the longest drive a customer is willing to make.



3. Identify optimal site within each trade area

- **Co-tenant mix** - What other stores are near the site that would draw the same type of customers?
- **Traffic volume and direction** - How many cars drive by every day?
- **Good visibility/access** - Can customers see and easily get to the site?
- **Zoning/construction terms** - Does the site match the store's needs?
- **Cost** - How much will it cost to purchase/rent/build/remodel?

Once a trade area is identified, the retailer will review the available site options within the area to determine what specific site has the best potential.

A NOTE ABOUT FRANCHISES

In addition to meeting the site selection criteria, franchise-owned businesses typically require a local or regional franchisee (owner) to commit to the purchase of several trade areas within a market and that owner makes the decision whether to open a store in a specific trade area or community.

Source: *Retail Site Selection: A Blend of Art and Science*, Buxton 2019

BROOKINGS MARKET CHALLENGES

Market Area

National retailers seek out market areas based on population (the number of potential **consumers**). South Dakota is a rural state with low population density. Fewer customers means **less demand** and lower sales/profit margins.

A smaller market lacks the opportunity for several trade areas that can support **multiple stores** of the same type. Retailers will choose a more populous region of the country to expand to first.

It also doesn't make financial sense for a business to enter a market that is too far away from its existing **supply chain** (process used to get products to consumers). Instead, they will get their start in specific parts of the country and gradually spread out from there, again choosing areas of the country that are more heavily populated.

Trade Area

The Brookings trade area includes the city (approx. 24,000) and small, rural towns around Brookings. The low number of consumers in the area presents a challenge when retailers determine **projected sales**. When entering the S.D. market, retailers will likely pick Sioux Falls or Rapid City first. Since Brookings is so close to Sioux Falls, retailers are hesitant to add additional stores that may result in **cannibalization** of their existing stores in Sioux Falls (or Watertown). *Target* would be a prime example with two stores already located in Sioux Falls and one store in Watertown.

Another challenge is the population make-up, with college students representing roughly half of the **potential customers**. These residents might not be a targeted consumer for a specific retailer or restaurant. Pizza places are very popular in Brookings due to the high percentage of college students in the trade area.

Available Sites

In order to make a new location work, retailers have to have affordable sites on **high traffic** corridors to pick from. In Brookings, 6th Street would be the busiest street and there are not many available sites along this corridor to choose from. Many retailers also want to be right by Walmart because of its large consumer draw. Brookings has challenges when meeting the **co-tenant mix** that many national retailers require. For instance, smaller clothing and clothing accessory stores need to be near larger department stores to draw enough customers.

CURRENT RETAIL INDUSTRY STATUS

- Constant disruption from new technologies
- Growth in popularity of online versus in-store shopping
- Threat of recession preventing investment in new stores
- Uncertainty from tariff hikes/trade wars
- Stores closing throughout the country
- Changing consumer preferences and expectations

COMMON MISCONCEPTIONS

The city actively recruits pizza places.

FACT: While market information is provided to all types of businesses upon request, the city does not provide incentives to or actively pursue pizza restaurants.

The city prevents new retail and/or restaurants from coming to town.

FACT: The city also does not prevent any business from opening a store here.

A business will come to town if enough customers want it here.

FACT: Many factors are considered when determining whether to enter a new market or trade area.

CRITERIA EXAMPLES

Kohl's

- Minimum trade area population of 100,000 people

Red Lobster

- 150,000+ population, 50,000+ within 5 miles of the restaurant

Olive Garden

- Minimum population of 100,000 people within a 15 minute drive time

Appendix A: Data Sources

Page 5

U.S. Dept. of Labor, Bureau of Labor Statistics – State of S.D. & Brookings County <https://www.bls.gov/data/>

S.D. Dept. of Revenue, Business Tax Division – City of Brookings https://dor.sd.gov/Taxes/Business_Taxes/

Page 9

U.S. Census 2018 Estimate – Brookings City Population, Brookings County Population <https://factfinder.census.gov>

U.S. Census 2015 Inflow/Outflow – OnTheMap <https://onthemap.ces.census.gov/>

S.D. Board of Regents Fall, 2017 – SDSU Enrollment (2018 Factbook) <https://www.sdbor.edu/>

U.S. Census 2017 Estimate – Brookings County College Student Population <https://factfinder.census.gov>

Page 10

U.S. Census 2017 Estimate – Brookings County Employment <https://factfinder.census.gov>

Page 11

U.S. Census 2017 Estimate – Brookings County Commuting Characteristics <https://factfinder.census.gov>

Page 12

U.S. Census 2017 Estimate – Brookings County Educational Attainment <https://factfinder.census.gov>

Page 13

U.S. Census 2017 Estimate – Brookings County Age and Sex <https://factfinder.census.gov>

U.S. Census 2017 Estimate – Brookings County Household Income <https://factfinder.census.gov>

Page 23

Retail Leakage and Surplus Analysis, Buxton 2018 – see Appendix C

Page 39-40

Retail Site Selection: A Blend of Art and Science, Buxton 2019

<https://www.buxtonco.com/learn/retail-site-selection-a-blend-of-art-and-science>

Appendix B: Brookings County Consumer Survey

BEDC is conducting a short survey to obtain feedback from Brookings County residents and workers. Responses are completely anonymous. Complete survey by Monday, May 6 for a chance to win \$500!

Please tell us a little bit about yourself.

1. Where do you currently live?

- Within Brookings city limits
- Outside of Brookings County
- Neighboring community in Brookings County
- College student - on campus
- Farm/rural area in Brookings County
- College student - off campus

2. How many years have you lived in Brookings County?

- Less than 1 year
- 10-19 years
- 1-3 years
- 20 years or more
- 4-9 years

3. Please choose the option that best describes your current employment status.

- Part-time job
- College student - not working
- Full-time job
- College student - working part-time
- Unemployed
- College student - working full-time
- Retired

4. Where do you work?

- Within Brookings city limits
- Neighboring community in Brookings County
- Farm/rural area in Brookings County
- Outside of Brookings County

5. How long is your daily commute to work?

- Less than 10 minutes
- 10-19 minutes
- 20-29 minutes
- 30-39 minutes
- 40-49 minutes
- 50-59 minutes
- 60-69 minutes
- 70 or more minutes

6. Please choose the option that best describes your current job.

- Self-employed
- Retail
- Customer service
- General labor
- Skilled trades - welder, electrician, plumber, etc.
- Office/clerical
- Other (please specify)
- Manager/administrator/consultant
- Medical professional
- Science/technology/research
- Professor/teacher
- Financial/real estate

7. Why do you choose to work outside of Brookings County?

8. Please choose the option that best describes your current education level.

- Did not graduate high school
- High school diploma or equivalency
- Some college or technical school, no degree
- Associate's degree or other certification or training
- Bachelor's degree
- Graduate or professional degree

9. Please choose the option that best describes your current stage of life.

- Young Adult/Student
- Early-Mid Career, No Children
- Young Family with Children
- Adult (Single or Married) with Older Dependent Children
- Mid-Late Career, No Children or Empty Nester
- Retired

10. What is your approximate average household income?

- \$0-\$24,999
- \$25,000-\$49,999
- \$50,000-\$74,999
- \$75,000-\$99,999
- \$100,000-\$124,999
- \$125,000-\$149,999
- \$150,000-\$174,999
- \$175,000-\$199,999
- \$200,000 and up
- Prefer not to answer

13. If you choose to shop outside of Brookings County, please indicate the reasons why in order of importance from 1 being the most important to 5 being the least important.

<input type="checkbox"/>	Price/affordability
<input type="checkbox"/>	Variety of stores
<input type="checkbox"/>	Product availability/options
<input type="checkbox"/>	Overall experience (trip includes dining, other activities)
<input type="checkbox"/>	Convenience/ease of access

14. Other reasons you shop outside of Brookings County

15. How many times do you go out to eat breakfast, lunch and/or dinner in Brookings County?

	0-2 times per month	3-4 times per month	1-2 times per week	3-4 times per week	5 or more times per week
Breakfast	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lunch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dinner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16. If you choose to dine outside of Brookings County, please indicate the reasons why in order of importance from 1 being the most important to 6 being the least important.

<input type="checkbox"/>	Price/affordability
<input type="checkbox"/>	Quality
<input type="checkbox"/>	Restaurant type/variety
<input type="checkbox"/>	Dining atmosphere
<input type="checkbox"/>	Overall experience (trip includes shopping, other activities)
<input type="checkbox"/>	Convenience/ease of access

17. Other reasons you dine outside Of Brookings County

18. Please indicate your interest in seeing more of these types of establishments in Brookings County.

	Very interested	Somewhat interested	Neutral	Not very interested	Not at all interested
Household Essentials/General Merchandise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clothing/Clothing Accessories/Shoes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vehicles/Vehicle Parts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home Improvement (Paint, Tools & Equipment, Building Materials, Lawn & Garden)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Furniture/Home Decor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Groceries/Specialty Food/Beverage Stores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Beauty, Health & Personal Care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Electronics & Appliances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurants - Family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurants - Fine Dining	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bars/Nightlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sporting Goods, Toys, Hobby, Book & Music Stores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

19. If you could bring one new retailer and/or restaurant to Brookings, what would be your top choice?

Retailer

Restaurant

Building Brookings: Please share your thoughts to help us recruit and retain residents.

20. How likely are you to encourage friends and family to move to Brookings County?

- Very likely
- Somewhat likely
- Not very likely
- Not at all likely

If not likely, why?

21. What improvements would you like to see Brookings make?

22. What do you like the most about Brookings?

Thank you for taking this survey! Please provide your contact information for your chance to win \$500!

Winner will be chosen at random within a week following the survey deadline of May 6, 2019. Individual responses will be kept completely confidential. Please call (605) 697-8103 for more information.

23. Contact Information

Name	<input type="text"/>
Address	<input type="text"/>
City/Town	<input type="text"/>
State/Province	<input type="text"/>
ZIP/Postal Code	<input type="text"/>
Email Address	<input type="text"/>
Phone Number	<input type="text"/>





Appendix C: Retail Leakage and Surplus Analysis Buxton, 2018





Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between estimated and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

Interpreting Leakage Index

- 1.0 = equilibrium, meaning that demand and sales in the area being analyzed are in balance.
- .80 = demand exceeds sales by 20%, meaning that consumers are leaving the area being analyzed.
- 1.2 = sales exceed demand by 20%, meaning that consumers are coming from outside the area being analyzed.

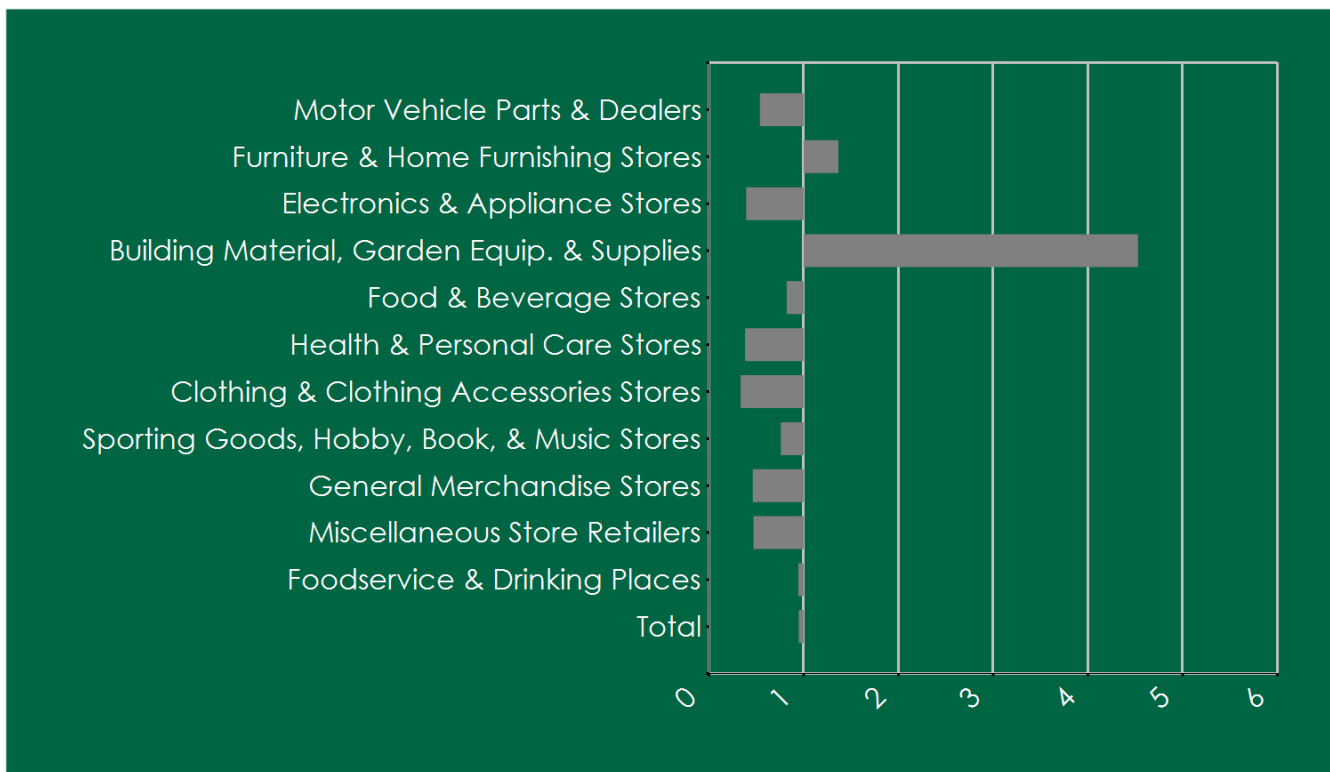
All estimates, projections or forecasts in this model are subject to errors, including statistical error, error due to the subjective nature of some data, error due to changes in demographics, error based on lagging competitor information or growth data, and error due to factors that are not included in the model. The user assumes all risk of reliance on this information.

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 1 provides the leakage/surplus indices and following is the sales potential and estimated sales for major store types.

Figure 1. Leakage/Surplus Index and Estimated and Potential Sales by Major Store Types



Store Type	Potential	Estimated Sales	Surplus/Leakage
Motor Vehicle Parts & Dealers	177,433,164	95,329,308	0.5
Furniture & Home Furnishing Stores	16,535,841	22,588,521	1.4
Electronics & Appliance Stores	14,134,686	5,552,298	0.4
Building Material, Garden Equip. & Supplies	55,600,953	251,785,389	4.5
Food & Beverage Stores	104,714,098	85,858,207	0.8
Health & Personal Care Stores	52,336,237	19,954,913	0.4
Clothing & Clothing Accessories Stores	34,914,212	11,648,377	0.3
Sporting Goods, Hobby, Book, & Music Stores	11,733,046	8,889,602	0.8
General Merchandise Stores	101,531,957	46,862,769	0.5
Miscellaneous Store Retailers	20,361,509	9,540,900	0.5
Foodservice & Drinking Places	98,565,525	92,973,268	0.9
Total	687,861,228	650,983,553	0.9

All estimates, projections or forecasts in this model are subject to errors, including statistical error, error due to the subjective nature of some data, error due to changes in demographics, error based on lagging competitor information or growth data, and error due to factors that are not included in the model. The user assumes all risk of reliance on this information.

Sources and Methodology

The primary data sources used in the construction of the database include:

- Current Year CAPE (Census Area Projections & Estimates) Consumer Expenditure Estimates
- Census of Retail Trade, Merchandise Line Sales
- Census Bureau Monthly Retail Trade

The Census of Retail Trade presents a table known as the Merchandise Line summary, which relates approximately 120 merchandise lines (e.g. hardware) to each of the store types. For each merchandise line, the distribution of sales by store type can be computed, yielding a conversion table which apportions merchandise line sales by store type.

The CAPE (Census Area Projections & Estimates) Consumer Expenditure database was re-computed to these merchandise lines by aggregating both whole and partial categories, yielding, at the block group level, a series of merchandise line estimates which are consistent with the CAPE Consumer Expenditure database.

These two components were then combined in order to derive estimated potential by store type. The results were then compared to current retail trade statistics to ensure consistency and completeness.



Appendix D: 2013 Brookings Area Community Survey Results



Summary and Participation

The Brookings Area Community Survey was available online and in printed format at the BEDC office from 10/29/13 through 11/12/13. Responses received totaled 1,076, including 22 printed responses and 1,054 electronic responses. A large majority of the participants live within Brookings city limits (75.9%), while 12.5% live in neighboring communities and 11.6% live in rural areas. Participants indicated their current stage in life and results were tabulated for each group.

Please choose the option that best describes your current stage of life:		
Answer Options	%	#
Young Adult/Student	6.7%	71
Early-Mid Career, No Children	20.8%	222
Young Family with Children	28.8%	307
Adult (Single or Married) with Older Dependent Children	15.2%	162
Mid-Late Career, No Children or Empty Nester	19.2%	205
Retiree	9.2%	98
<i>answered question</i>		1065

The Early-Mid Career, No Children and the Young Family with Children age categories received the most responses and accounted for 49.6% of the total.

Please choose the option that best describes your current education level?								
Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Did not graduate high school	0.5%	5	1.4%	0.0%	0.0%	0.0%	0.5%	3.1%
High school diploma or equivalency	5.7%	61	7.0%	1.4%	1.6%	6.8%	11.3%	14.3%
Some college or technical school, no degree	13.6%	145	42.3%	6.3%	10.1%	14.3%	17.2%	10.2%
Associate's degree or other certification, training	12.4%	132	1.4%	13.1%	13.4%	11.2%	14.2%	14.3%
Bachelor's degree	44.1%	471	36.6%	60.4%	52.8%	36.0%	31.4%	25.5%
Graduate or professional degree	23.8%	254	11.3%	18.9%	22.1%	31.7%	25.5%	32.7%
<i>answered question</i>		1068	71	222	307	161	204	98

Note: "Bachelor's degree" or "Graduate or professional degree" accounted for 67.9% of the total responses.

Job Availability

What type of job opportunity is most important to you? (Please select one)								
Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
General Labor	1.8%	18	1.5%	2.4%	0.4%	2.0%	2.0%	2.2%
Skilled Trades	6.0%	60	5.9%	9.0%	4.6%	6.0%	6.6%	2.2%
Retail	0.9%	9	1.5%	1.0%	0.7%	0.7%	1.5%	0.0%
Office	10.1%	102	8.8%	11.4%	7.1%	6.7%	20.3%	2.2%
Manager/Administrator	15.8%	159	20.6%	11.0%	19.8%	24.2%	15.2%	0.0%
Professional	37.7%	380	33.8%	43.8%	44.5%	38.9%	32.5%	14.0%
Science/Technology	12.0%	121	20.6%	15.2%	15.2%	10.7%	6.6%	3.2%
Medical	3.4%	34	2.9%	3.3%	4.2%	6.0%	2.0%	0.0%
Does Not Apply	12.3%	124	4.4%	2.9%	3.5%	4.7%	13.2%	76.3%
<i>answered question</i>		1007	68	210	283	149	197	93

Brookings Area Community Survey

Do you feel Brookings has job opportunities available in the category you selected as most important?

Answer Options	%	#	Yes		No		Unsure	
General Labor	1.8%	18	10	55.5%	6	33.3%	2	11.1%
Skilled Trades	6.0%	58	39	67.2%	9	15.5%	10	17.2%
Retail	0.9%	9	4	44.4%	4	44.4%	1	11.1%
Office	10.1%	101	54	53.5%	21	20.8%	26	25.7%
Manager/Administrator	15.8%	159	76	47.8%	52	32.7%	31	19.5%
Professional	37.7%	377	230	61.0%	90	23.9%	57	15.1%
Science/Technology	12.0%	121	75	62.0%	26	21.5%	20	16.5%
Medical	3.4%	34	16	47.1%	11	32.4%	7	20.6%
Does Not Apply	12.3%	95	39	41.1%	11	11.6%	45	47.4%

Note: Age category break-down of participants indicating Brookings did have job opportunities ranged from 54% with the young family and adult (single or married) with older dependent children to 62% with the mid-late career, empty nesters. The age group with highest percentage indicating Brookings did not have enough job opportunities was the young family group at 28%.

Activities

Rank in order of importance the arts and entertainment options which you are most interested in attending. (Rank from 1 to 5 with 1 being the most important and 5 being the least important), The lower the rating, the more important the activity.

Answer Options	Rating Average	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree	
Band/Music Concerts	2.50	1.89	2.10	2.43	2.55	2.97	2.92	The two older age groups revealed the biggest difference from the average rating of the entire population, selecting theater as their number one option.
Festivals	2.60	2.38	2.37	2.41	2.71	2.81	3.30	
Theater Performances	2.87	3.21	2.95	3.14	2.76	2.56	2.40	
Museums/Galleries	3.30	3.65	3.60	3.18	3.22	3.25	2.94	
Cultural Events	3.73	3.86	3.98	3.84	3.77	3.41	3.43	

What level of spectator sports are the most important to you? (Select all that apply)

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
College Level Sports	75.5%	625	93.1%	83.2%	65.4%	72.1%	75.8%	84.0%
High School Level Sports	37.8%	313	29.3%	23.6%	45.7%	55.0%	32.9%	28.0%
Youth Sports	31.6%	262	13.8%	10.6%	59.8%	35.7%	14.1%	22.7%
Sports Clubs (hockey, skating, rodeo)	30.8%	255	43.1%	36.6%	31.9%	33.3%	24.8%	12.0%
Other (please specify)		107	5	22	17	15	33	14
<i>answered question</i>		828	58	161	254	129	149	75

Note: Professional sports was mentioned the most as a write-in option, with 27 responses.

What sports and recreational activities do you like to PARTICIPATE in? (Select all that apply)

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree	"Other" responses mentioned multiple times included:
									Equestrian/Rodeo – 9 Tennis – 8 Fitness/Wellness Center – 6 Dog Park/Pet Friendly Activity – 6 Bowling – 4 Auto Racing, Dirt Track – 4 Hiking – 4 Inline/Roller Skating – 3 Basketball – 3 Softball – 2 Archery/Trap – 2 Soccer – 2 Hockey – 2 Racquetball – 2 Swimming – 2
Walking/Running	72.8%	701	64.1%	70.3%	71.5%	71.9%	77.2%	79.8%	
Parks	67.0%	645	60.9%	60.4%	75.9%	59.6%	72.0%	58.3%	
Camping	49.4%	476	56.3%	53.5%	58.8%	52.1%	37.6%	27.4%	
Cycling	43.1%	415	45.3%	40.1%	42.3%	47.9%	46.6%	34.5%	
Hunting/Fishing	42.2%	406	46.9%	44.6%	46.7%	47.3%	32.3%	31.0%	
Water Sports	34.9%	336	40.6%	38.1%	41.2%	34.2%	28.0%	19.0%	
Golf	34.3%	330	39.1%	34.7%	38.3%	33.6%	29.6%	28.6%	
Winter Sports	25.4%	245	37.5%	29.2%	28.8%	23.3%	19.0%	14.3%	
League Sports	17.3%	167	34.4%	26.7%	23.0%	11.6%	3.2%	4.8%	
Other (please specify)		68	6	15	15	3	20	8	
<i>answered question</i>		963	64	202	274	146	189	84	

What cultural and educational activities do you like to PARTICIPATE in? (playing in a community band, participating in art class, etc. Select all that apply)

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Educational Opportunities/Lectures	56.4%	416	62.0%	49.3%	53.7%	59.1%	58.5%	63.2%
Band/Music Concerts	39.3%	290	46.0%	50.0%	42.3%	40.9%	28.6%	25.0%
Cultural Events	37.0%	273	32.0%	31.5%	34.8%	36.5%	42.2%	46.1%
Art	32.0%	236	38.0%	32.9%	34.8%	25.2%	32.7%	27.6%
Theater	25.9%	191	32.0%	22.6%	23.9%	27.8%	27.2%	25.0%
<i>answered question</i>		738	50	146	201	115	147	76

Retail/Shopping/Dining Options

If you choose to shop outside of Brookings, please indicate the reasons why in order of importance from 1 being the most important to 5 being the least important.

Answer Options	Rating Average	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Variety of Stores	2.07	1.67	1.86	1.99	2.18	2.33	2.29
Product Availability	2.78	2.97	2.82	2.79	2.75	2.68	2.76
Product Choice/Options	2.89	3.02	3.01	2.79	2.79	2.91	2.99
Price/Affordability	3.31	3.45	3.39	3.32	3.21	3.21	3.36
Overall Shopping Experience (day trip to include dining, other activities)	3.95	3.89	3.91	4.09	4.07	3.88	3.61
<i>answered question</i>	974						

What types of stores would you like to see that Brookings does not have? (841 responses)

Big Box/Discount/Super Store – 834

Top Responses: Target – 537, Shopko – 109, Costco – 24

Clothing/Shoes – 430

Top Responses: Kohl’s – 143, TJ Maxx – 21, Herberger’s – 20

Grocery Store/Whole/Organic Foods – 130

Home Improvement/Hardware/Furniture/Decor – 109 Top Responses: Mendards – 39, Bed Bath & Beyond - 14

Outdoor/Sporting Goods - 98

Top Responses: Scheels – 24, Cabelas – 23

Office Supplies/Electronics/Appliances – 60

Health & Beauty - 34

Other: Hobby/Arts & Crafts – 59, Mall or Outlet – 45, Bookstore – 23, Fabric/Sewing - 22

If you choose to dine outside of Brookings, please indicate the reasons why in order of importance from 1 being the most important to 4 being the least important.

Answer Options	Rating Average	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Restaurant Type/Variety	1.42	1.26	1.34	1.34	1.41	1.57	1.68
Quality	2.46	2.54	2.41	2.47	2.51	2.46	2.48
Price/Affordability	3.05	3.00	3.16	3.07	3.01	3.02	2.89
Dining Atmosphere	3.07	3.20	3.09	3.11	3.07	2.95	2.95
<i>answered question</i>	953						

What types of dining options would you like to see that Brookings does not have? (725 responses)

General Comments

- Approximately 60 people mentioned wanting more variety, something other than chains or fast food.
- There were 40 people who felt the existing selections in Brookings were enough and no more dining choices were needed.
- Other general comments heard multiple times included the need for dining in different areas of town.

Brookings Area Community Survey

Fast Food/Casual/Family Dining – 642

Top Responses: Taco Bell – 88, Panera Bread – 50, Wendy’s 47

Ethnic – 465

Top Responses: HuHot – 46, Thai – 30, Chinese – 20, Mexican – 20

Italian – 217

Top Responses: Olive Garden – 107, Johnny Carinos - 28

Sports Bar/American - 222

Top Responses: Texas Roadhouse – 40, Ruby Tuesday – 20, Chili’s - 20

Steak – 107

Top Responses: Outback – 23, Minerva’s - 20

Seafood – 105

Top Responses: Red Lobster – 61

Other: Upscale/Fine Dining – 56, Healthy /Gluten Free/Organic/Vegan –38, Supper Club – 22,

Unique/Specialized/Gourmet – 14, Homestyle – 10

Desired Community Features

At your current stage in life, if you were considering moving to a different community, rank in order of importance the reasons you would choose that community from 1 to 12 with 1 being the most important and 12 being the least important.

Answer Options	Rating Average	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Job Availability	3.53	2.00	2.09	2.20	3.02	5.22	9.50
Cost of Living/Affordability (housing, taxes, utilities)	4.53	4.25	4.35	4.70	4.61	4.31	4.84
Proximity to Family	4.85	4.72	5.19	4.89	5.21	4.28	4.59
Safety of Community	5.04	5.69	5.55	4.31	4.91	5.29	5.24
Educational System	6.56	7.15	7.25	4.01	6.39	8.87	7.93
Healthcare Availability	6.64	7.91	7.86	6.74	6.74	5.63	4.55
Things To Do (sports/recreation/entertainment/culture)	7.00	6.06	6.15	7.84	7.39	6.96	6.47
Climate	7.38	8.54	7.60	8.53	6.81	6.12	6.03
Overall Physical Quality (landscaping, design, public art)	7.83	7.87	7.71	8.44	7.81	7.61	6.61
Variety of Retail Options (shopping, dining)	7.89	8.12	7.66	8.41	8.03	7.65	6.79
Location (near mountains, ocean, etc)	7.91	7.61	7.79	8.59	7.82	7.27	8.00
Social Activities (religious, clubs, civic organizations, etc)	8.83	8.09	8.87	9.27	9.24	8.76	7.47

Rank in order of importance the features you would consider when choosing a house or neighborhood. (Rank from 1 to 9 with 1 being the most important and 9 being the least important)

Answer Options	Rating Average	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Cost/Affordability	1.70	1.45	1.44	1.85	1.75	1.69	1.89
Overall Physical Appearance of Neighborhood	3.39	4.33	3.18	3.80	3.35	3.03	2.69
Friendliness	4.16	3.94	4.30	4.38	4.16	3.91	4.00
Location Near Job	4.67	3.40	3.88	4.94	4.61	4.65	6.76
Family-Oriented	4.80	5.64	5.63	3.28	4.74	5.56	5.47
Location Near Retail Opportunities	5.88	5.97	5.78	6.69	5.95	5.19	4.75
Location Near Educational System (schools, campus)	6.22	6.37	6.55	4.85	6.10	7.55	6.91
Diversity (age or ethnic)	6.92	6.64	7.05	7.50	6.96	6.56	5.74
Location Near Golf Course, Recreational Opportunities	7.28	7.25	7.22	7.70	7.39	6.85	6.79

Which physical community features are most important to you? (Rank in order of importance with 1 being the most important and 7 being the least important)

Answer Options	Rating Average	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Nicely landscaped streets	3.00	3.11	3.12	3.31	2.79	2.81	2.41
High quality neighborhood parks	3.31	3.87	3.67	2.51	3.54	3.38	3.98
Bike and walking paths	3.44	3.54	3.11	3.35	3.56	3.51	4.09
Neighborhood design	3.64	3.56	3.86	3.71	3.41	3.62	3.44
Clearly marked navigation/street signs	3.81	3.19	3.52	3.92	4.18	3.83	3.86
Historic preservation of buildings	4.79	4.94	4.61	5.00	4.75	4.75	4.72
Community entrance landscaping/signage	6.02	5.79	6.12	6.22	5.79	6.07	5.55
<i>answered question</i>	955	63	201	269	142	189	86

Referring back to the physical community feature that you have selected as most important, how does that feature in Brookings rate?

Answer Options	#	Very Good	Good	Ave	Poor	Very Poor	Total
Clearly marked navigation/street signs	208	14.5%	46.4%	29.5%	7.3%	2.4%	207
Nicely landscaped streets	195	20.6%	46.9%	24.7%	6.2%	1.6%	194
Bike and walking paths	193	19.8%	41.2%	29.7%	8.9%	0.5%	192
High quality neighborhood parks	156	22.4%	44.2%	29.5%	3.9%	0.0%	156
Neighborhood design	110	8.3%	38.5%	39.5%	12.8%	0.9%	109
Historic preservation of buildings	65	10.8%	47.7%	30.8%	9.2%	1.5%	65
Community entrance landscaping/signage	24	41.7%	45.8%	12.5%	0%	0%	24
<i>answered question</i>	951						

Campus/Community Relationship

How strong is the Campus/Community relationship in Brookings?

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Extremely Strong	12.0%	115	10.9%	10.1%	11.4%	10.5%	15.3%	13.6%
Quite Strong	38.9%	373	46.9%	36.7%	42.3%	35.7%	34.2%	44.3%
Moderately Strong	35.0%	336	26.6%	38.2%	38.2%	39.9%	30.0%	28.4%
Slightly Strong	9.5%	91	12.5%	9.5%	5.5%	9.8%	13.2%	9.1%
Not At All Strong	4.7%	45	3.1%	5.5%	2.6%	4.2%	7.4%	4.5%
<i>answered question</i>		960	64	199	272	143	190	88

Brookings Area Community Survey

What are the SDSU services/activities that help you feel a connection between the campus and community? Select all that apply.

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Athletic Offerings	74.8%	668	75.0%	71.6%	79.8%	77.4%	72.8%	68.2%
Performing Arts	65.6%	586	41.7%	60.1%	61.5%	69.2%	78.7%	75.3%
Student Employment Opportunities (internships, workstudy, etc)	44.7%	399	70.0%	49.2%	45.1%	40.6%	42.6%	25.9%
Cultural Offerings	41.0%	366	18.3%	30.6%	36.6%	41.4%	56.2%	62.4%
Library Services	13.9%	124	10.0%	10.9%	9.7%	15.0%	18.3%	24.7%
Student Involvement and Leadership Opportunities (Greek life, student organizations)	13.1%	117	26.7%	15.3%	14.0%	6.8%	12.4%	8.2%
Technology Services and/or Assistance	9.4%	84	5.0%	6.6%	7.0%	15.8%	11.2%	10.6%
Faculty Consultation	8.1%	72	8.3%	6.0%	5.4%	11.3%	8.3%	10.6%
Other (please specify)		69	3	6	19	8	20	12
<i>answered question</i>		893	60	183	257	133	169	85

“Other” responses mentioned multiple times included: Wellness Center – 18, Preschool/Kindergarten – 5, Church – 3, Employment – 2, Lectures/Guest Speakers – 2, Student Teaching/Presence in Schools - 2

What changes can be made to improve the Campus/Community relationship in Brookings? (351 responses)

Top Responses	#
Need for more events & activities (on campus and off) that involve campus and community (service programs, block parties, internships, mentoring, tutoring, lectures, classes, cultural events, etc)	101
Concerns about student housing: quality, inspections, zoning, rental prices	77
Parking/Accessibility/Traffic/BATA availability /Campus Navigation	74
Better awareness, communication of events, opportunities for involvement between campus & community	64
Concerns about student behavior and lack of respect, need for increased police presence and law enforcing	33
Concerns about city catering to campus and students too much, college needs to give back to community	32

Leadership/Engagement/Social Connections

How connected do you feel with other residents of the Brookings community who are your same age?

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Extremely Connected	7.0%	67	9.5%	4.6%	4.8%	5.0%	5.9%	22.5%
Moderately Connected	30.5%	291	36.5%	19.3%	27.2%	32.6%	38.5%	41.6%
Slightly Connected	25.9%	247	12.7%	28.9%	31.3%	27.7%	20.9%	21.3%
Neither Connected or Disconnected	18.7%	178	15.9%	18.3%	20.6%	14.9%	24.6%	9.0%
Slightly Disconnected	7.6%	72	11.1%	12.7%	8.1%	7.8%	3.7%	0.0%
Moderately Disconnected	6.0%	57	9.5%	9.1%	5.9%	5.7%	3.2%	3.4%
Extremely Disconnected	4.3%	41	4.8%	7.1%	2.2%	6.4%	3.2%	2.2%
<i>answered question</i>		953	63	197	272	141	187	89

How important is it for you to be involved in:

Answer Options	Extremely Important		Very Important		Moderately Important		Slightly Important		Not At All Important		Response Count
Government	45	4.8%	146	15.6%	317	33.8%	227	24.2%	203	21.6%	938
Civic Organizations	34	3.6%	180	19.1%	311	33.0%	250	26.6%	166	17.6%	941
Boards/Committees	45	4.8%	146	15.6%	307	32.8%	259	27.7%	179	19.1%	936
Clubs	40	4.3%	139	14.9%	309	33.0%	275	29.3%	173	18.5%	936
<i>answered question</i>											944

Note: When divided into age categories, the young adult/student group’s responses differed from the total responses by selecting “not at all important” under Government as their highest percentage at 31.7% along with “slightly important” for Clubs (36.5%) and Boards/Committees (31.7%). Likewise, the early/mid career no children group had their highest percentages under “slightly important” for boards/committees (29.6%) and clubs (30.1%). The mid/late career or empty nester group chose “slightly important” for boards/committees (28%) and “not at all important” for clubs (27.7%) as their highest percentage.

Overall, how effective is the leadership in Brookings?

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Very effective	14.6%	137	7.9%	8.3%	9.7%	12.4%	22.6%	33.0%
Somewhat effective	53.2%	500	60.3%	47.7%	58.2%	54.7%	52.7%	46.6%
Neither Effective or Ineffective	18.4%	173	23.8%	26.4%	17.9%	19.7%	14.0%	6.8%
Somewhat ineffective	9.7%	91	4.8%	11.9%	11.6%	6.6%	8.1%	10.2%
Very ineffective	4.0%	38	3.2%	5.7%	2.6%	6.6%	2.7%	3.4%
<i>answered question</i>		939	63	193	268	137	186	88

Overall Community Satisfaction

How proud are you to live in Brookings?

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Extremely proud	20.1%	190	7.9%	13.3%	18.1%	15.9%	28.1%	38.6%
Quite proud	38.3%	362	41.3%	37.2%	41.1%	39.9%	35.7%	35.2%
Moderately proud	26.4%	249	27.0%	26.5%	28.9%	27.5%	24.9%	19.3%
Slightly proud	10.4%	98	15.9%	14.3%	8.9%	11.6%	8.1%	4.5%
Not at all proud	4.8%	45	7.9%	8.7%	3.0%	5.1%	3.2%	2.3%
<i>answered question</i>		944	63	196	270	138	185	88

Overall, how satisfied are you with your experience of living in Brookings?

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Extremely Satisfied	24.7%	234	19.0%	12.6%	23.4%	21.7%	34.1%	43.8%
Moderately Satisfied	46.0%	435	44.4%	48.5%	47.6%	47.1%	43.8%	39.3%
Slightly Satisfied	12.2%	115	19.0%	12.6%	13.8%	12.3%	9.7%	6.7%
Neither Satisfied or Dissatisfied	7.2%	68	9.5%	10.6%	5.9%	8.0%	5.4%	4.5%
Slightly Dissatisfied	5.7%	54	4.8%	9.1%	5.6%	5.8%	3.8%	3.4%
Moderately Dissatisfied	2.7%	26	1.6%	4.5%	3.7%	0.7%	2.2%	1.1%
Extremely Dissatisfied	1.5%	14	1.6%	2.0%	0.0%	4.3%	1.1%	1.1%
<i>answered question</i>		946	63	197	269	138	185	89

How promising is the future of Brookings?

Answer Options	%	#	Young Adult-Student	Early-Mid Career No Children	Young Family w Children	Adult w Older Dependent Children	Mid-Late Career Empty Nester	Retiree
Extremely promising	23.8%	226	23.8%	14.2%	26.9%	21.6%	29.7%	27.0%
Very promising	42.6%	404	30.2%	42.6%	43.5%	44.6%	38.9%	53.9%
Moderately promising	25.0%	237	31.7%	31.0%	24.4%	23.0%	24.3%	12.4%
Slightly promising	7.1%	67	12.7%	10.2%	4.4%	7.9%	6.5%	4.5%
Not at all promising	1.5%	14	1.6%	2.0%	0.7%	2.9%	0.5%	2.2%
<i>answered question</i>		948	63	197	271	139	185	89

What changes would most improve Brookings for you and/or your family? (661 responses)

Top Responses	#
More Retail/Shopping/Grocery/Dining (Target – 35)	260
Roads/Streets/Traffic/Navigation/Access/Sidewalks	151
Housing/Zoning/Affordable Housing/Student Housing/Rental Rates	120
More Activities/Entertainment/Concerts/Events	70
Improvement of Parks	58
More Family-Friendly (Housing/Activities/Entertainment/ Childcare)	58
Concerns about Education/Schools	54
More Jobs/Job Diversity/Better Pay	52
Leadership/Council/City Monopoly/City Spending/Decision Makers Concerns	47
Expanded/Improved Walking or Biking Trails	46
Cost of Living/Taxes/Ticket Prices/Gas Prices	43

What do you like least about Brookings? (675 responses)

Top Responses	#
Lack of Retail/Shopping/Dining Options	183
Streets/Roads/Traffic/Layout	94
Housing Costs/Property Taxes/Rental Prices/Zoning/Rundown Houses & Neighborhoods	88
City Government/Leadership/Spending/Politics/Select few or wealthy have the say	74
Winter/Weather/Climate	48
Too Small: not enough services/things to do/entertainment options/indoor options	42
Unfriendly/Too Exclusive/Close-minded/No Social Opportunities	41
Snow Removal	36
Lack of Jobs/Low Wages	30
Police/Crime/Vandalism/Code Enforcement	28
SDSU/SDSU Students/College Parties/Too Many Bars/Drinking Concerns	28
City-Owned Monopolies/Liquor Store/Liquor License Issues	27
Gas Prices	27

What do you like most about Brookings? (680 responses)

Top Responses	#
Small Town/Community Feel/ Family Friendly/Midwest Values/Quality of Life	196
Safe/Secure/Quiet/Peaceful	126
Friendly/Welcoming /Neighbors/Neighborhoods	119
Lots of Events/Amenities/Big Town Atmosphere/Things To Do/Sports	112
SDSU/SDSU Athletics/SDSU Events/Students/Support of SDSU/Campus-Community	104
The People	97
Aesthetics/Trees/Scenery/Landscaping/Design/Lighting/Signs/Historic Preservation	92
Clean/Neat/Well-Kept/Nice	80
Education/School System/Youth Programs	70
Parks/Nature Park/McCrory Gardens	53
Biking/Walking Trails	43



2301 Research Park Way Ste 113
Brookings, SD 57006
(605) 697-8103
bedc@brookingsedc.com

BrookingsEDC.com