

# **DICKINSON, NORTH DAKOTA TRADE AREA CHARACTERISTICS**

**Prepared for:  
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and  
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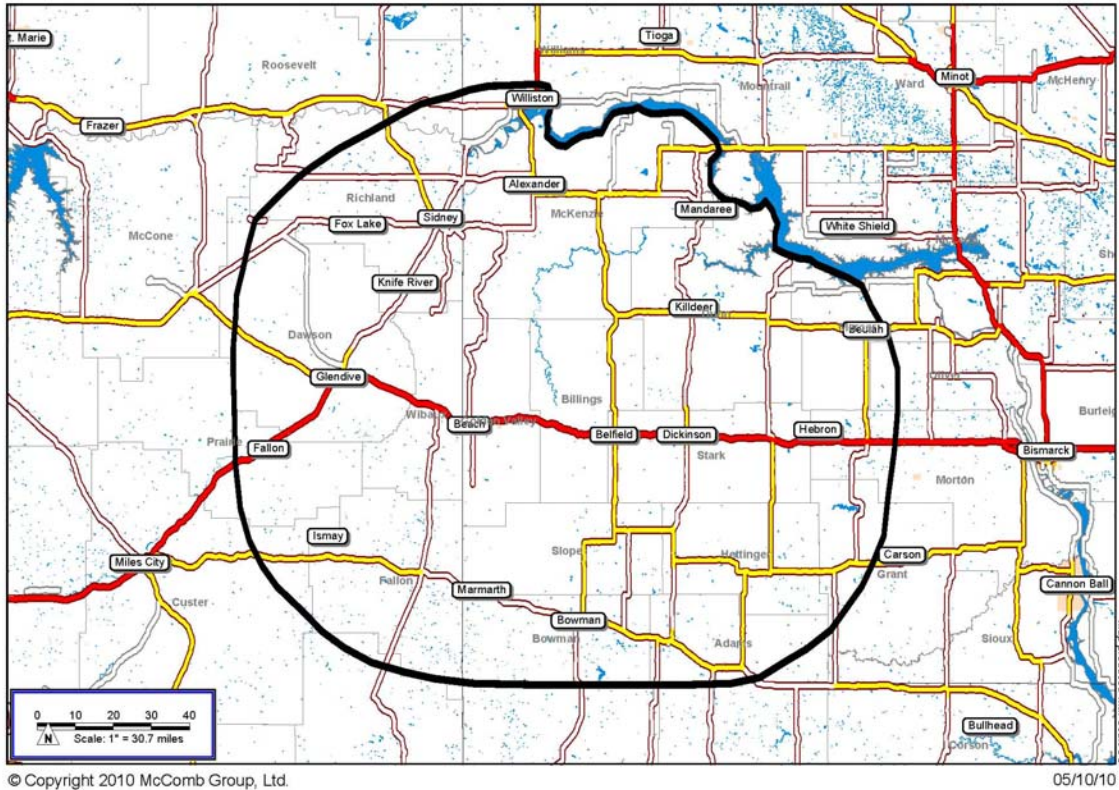
## DEMOGRAPHIC CHARACTERISTICS AND RETAIL SALES POTENTIAL

Dickinson is the largest community in southwestern North Dakota. Located in the Williston Basin, Dickinson's diversified economy has benefited from petroleum industry employment and spending. Increased oil production from the Bakken Formation is stimulating an influx of population and employment, creating an opportunity for increased retail development. Factors that support retail and service development in Dickinson include:

- ◆ Dickinson trade area population is expected to increase from 90,946 in 2010 to 94,187 by 2015.
- ◆ Dickinson trade area households are estimated to increase from 38,374 to 40,279 by 2015.
- ◆ Average household income in Dickinson is expected to increase from \$59,598 in 2010 to almost \$70,000 by 2015.
- ◆ One-quarter (10,108 households) of trade area households will have incomes above \$75,000 in 2015, and over 12 percent (5,137 households) will have incomes above \$100,000 in 2015.
- ◆ Stark County (Dickinson is the county seat) employment has increased at an annual rate of 2.6 percent since 2000.
- ◆ The Dickinson trade area extends 50 miles to the east, 70 miles to the south, 120 miles to the west, and 90 miles to the north, and encompasses 22,000 square miles.
- ◆ Much of the Williston Basin and its Bakken and Three Forks Formations are covered by the Dickinson trade area.
- ◆ Oil well drilling is occurring at an unprecedented pace. Currently, 122 drilling rigs are operating and industry representatives expect over 140 to be operating later this year. The success ratio is so high--95 to 99 percent--that oil companies are signing five-year drilling rig leases.
- ◆ Well drilling is expected to continue for ten to 20 years until the Bakken and Three Forks Formations have been fully penetrated by producing wells.
- ◆ The anticipated well drilling activity is expected to result in over 1,100 new producing oil wells will be completed annually creating about 1,400 permanent jobs annually in western North Dakota to support oil production activities. These are stable year-round jobs that can justify workers and their families to relocate to the Dickinson area.
- ◆ Petroleum industry employees earned an average wage of \$82,803 in 2008-09. Labor shortages are currently pushing wages higher.
- ◆ Developers are responding by building new housing to accommodate employees and their families.

Dickinson is well-positioned to capitalize on these unique trade area growth characteristics. Significant trade area demographics are contained in Tables 1 through 6. Additional demographic characteristics for the City of Dickinson, Dickinson trade area and United States are contained in Appendix A.

## DICKINSON TRADE AREA



Trade area households are expected to increase from 38,374 in 2010 to 40,279 in 2015.

Table 1

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
POPULATION AND HOUSEHOLDS: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

Trade Area / Year	Population		Households	
	Number	Rate of Change	Number	Rate of Change
<b>City of Dickinson</b>				
1990	13,080	N/A	4,997	N/A
2000	16,056	2.07 %	6,534	2.72 %
2010 E	17,179	0.75	7,306	1.25
2015 E	18,716	1.73	8,256	2.48
<b>Dickinson Trade Area</b>				
1990	98,130	N/A	37,090	N/A
2000	92,130	(0.63) %	36,923	(0.05) %
2010 E	90,946	(0.14)	38,374	0.43
2015 E	94,187	0.70	40,279	0.97
<b>United States</b>				
1990	247,051,287	N/A	91,402,228	N/A
2000	279,583,437	1.24 %	104,855,261	1.38 %
2010 E	306,341,111	1.02	114,634,696	1.00
2015 E	320,531,289	0.91	120,600,367	1.02

N/A: Not Available.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table 2

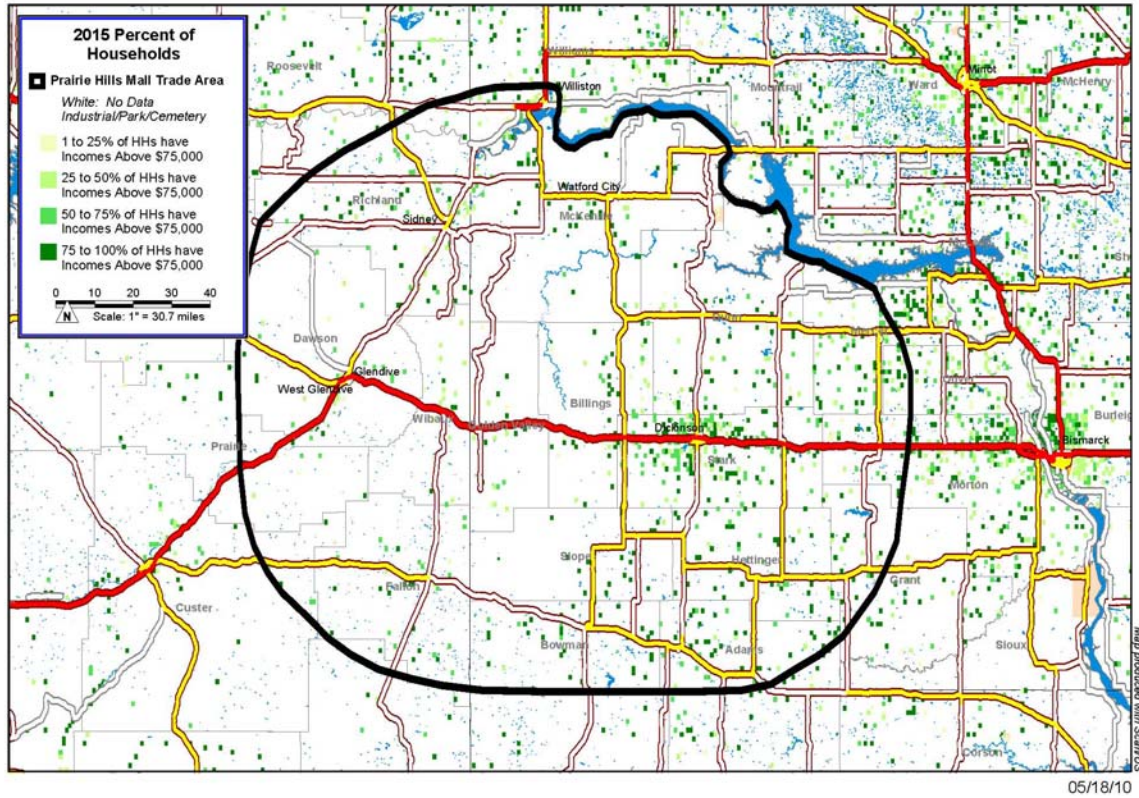
CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
 AVERAGE AND MEDIAN HOUSEHOLD INCOMES  
 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

Income Type / Year	City of Dickinson	Dickinson Trade Area	United States
<b>Average Household Income</b>			
1990	\$ 27,502	\$ 26,926	\$ 38,374
2000	39,136	38,931	56,653
2010 E	59,598	52,775	72,075
2015 E	69,240	58,406	78,123
<b>Median Household Income</b>			
1990	\$ 23,983	\$ 23,075	\$ 30,214
2000	32,306	31,639	42,751
2010 E	45,504	41,273	51,900
2015 E	52,955	45,528	55,483

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

**TRADE AREA 2015 AVERAGE HOUSEHOLD INCOME: PERCENT ABOVE \$75,000**



Households with incomes above \$75,000 in 2015 are distributed throughout the trade area.

Table 3

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
HOUSEHOLD INCOME DISTRIBUTION: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

	City of Dickinson	Dickinson Trade Area	United States
<b>Households above \$75,000</b>			
1990	2.8 %	2.6 %	9.5 %
2000	10.0	9.5	22.5
2010E	27.2	20.9	32.3
2015E	33.1	25.0	35.5
<b>Households above \$100,000</b>			
1990	0.8 %	1.0 %	4.4 %
2000	4.8	4.1	12.3
2010E	15.2	10.4	19.8
2015E	18.5	12.7	22.3
<b>Households above \$150,000</b>			
1990	0.2 %	0.3 %	1.6 %
2000	1.1	1.4	4.6
2010E	4.1	3.1	7.8
2015E	5.1	3.9	8.8

E: Estimated.  
Source: McComb Group, Ltd.

Table 4

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
HOUSEHOLD INCOME DISTRIBUTION: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

	City of Dickinson	Dickinson Trade Area	United States
<b>Households above \$75,000</b>			
1990	136	858	8,644,712
2000	656	3,503	23,606,167
2010E	1,981	8,031	37,070,976
2015E	2,734	10,108	42,805,014
<b>Households above \$100,000</b>			
1990	38	318	3,993,843
2000	314	1,520	12,880,832
2010E	1,106	3,998	22,777,802
2015E	1,527	5,137	26,875,047
<b>Households above \$150,000</b>			
1990	8	89	1,429,747
2000	72	521	4,796,506
2010E	299	1,196	8,971,805
2015E	420	1,573	10,653,219

E: Estimated.  
Source: McComb Group, Ltd.

Over 50 percent of Dickinson’s trade area population will be in the prime working age of 25 to 65 in 2015.

Table 5  
 CITY OF DICKINSON AND DICKINSON TRADE AREA  
 AGE DISTRIBUTION: 2010 AND 2015 ESTIMATED

Age Distribution	Dickinson		Dickinson Trade Area	
	Number	Percent	Number	Percent
<b>2010</b>				
Under 5	1,106	6.4 %	5,402	5.9 %
5 - 9	932	5.4	4,816	5.3
10 - 14	891	5.2	5,055	5.6
15 - 19	1,219	7.1	6,011	6.6
20 - 24	1,721	10.0	6,807	7.5
25 - 34	2,605	15.2	10,846	11.9
35 - 44	1,648	9.6	8,737	9.6
45 - 54	2,273	13.2	13,789	15.2
55 - 64	1,887	11.0	12,861	14.1
65 - 74	1,247	7.3	7,812	8.6
75 +	1,650	9.6	8,811	9.7
25 - 64	8,413	49.0 %	46,233	50.8 %
65 and Over	2,897	16.9	16,623	18.3
<b>2015</b>				
Under 5	1,300	6.9 %	6,114	6.5 %
5 - 9	1,133	6.1	5,493	5.8
10 - 14	976	5.2	4,975	5.3
15 - 19	1,071	5.7	5,178	5.5
20 - 24	1,471	7.9	6,240	6.6
25 - 34	3,267	17.5	13,448	14.3
35 - 44	1,868	10.0	8,590	9.1
45 - 54	2,063	11.0	11,202	11.9
55 - 64	2,361	12.6	14,690	15.6
65 - 74	1,560	8.3	9,727	10.3
75 +	1,645	8.8	8,530	9.1
25 - 64	9,559	51.1 %	47,930	50.9 %
65 and Over	3,205	17.1	18,257	19.4

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

One-quarter of the Dickinson population 25 and above are projected to hold a college and/or graduate or professional degree in 2015.

Table 6

CITY OF DICKINSON AND DICKINSON TRADE AREA  
EDUCATIONAL ATTAINMENT: 2010 AND 2015 ESTIMATED

Attainment	2010 E		2015 E	
	Number	Percent	Number	Percent
<b>City of Dickinson</b>				
No College	3,088	31.9 %	3,575	32.6 %
Some College/2 yr. Degree	3,957	40.9	4,609	42.0
College Graduate	2,050	21.2	2,206	20.1
Graduate School	575	5.9	583	5.3
<b>Dickinson Trade Area</b>				
No College	20,957	39.6 %	22,647	39.8 %
Some College/2 yr. Degree	20,690	39.1	22,252	39.1
College Graduate	8,974	16.9	9,606	16.9
Graduate School	2,351	4.4	2,444	4.3

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

## EMPLOYMENT

North Dakota's employment expanded from 309,223 in 2000 to 350,442 in 2008, an annual growth rate of 1.58 percent. Employment in Stark County increased at an average annual rate of 2.6 percent since 2000. Employment in the nine counties in southwestern North Dakota that rely on Dickinson as an economic focal point has increased at an annual rate of 1.95 percent since 2000.

Table 7

EMPLOYMENT  
NORTH DAKOTA, STARK COUNTY, AND NINE- COUNTY AREA  
2000 TO 2008

Year	North Dakota	Stark County	Nine Counties
2000	309,223	10,368	19,539
2001	311,632	10,470	19,636
2002	311,808	10,741	19,956
2003	314,273	10,927	20,357
2004	321,108	11,136	20,611
2005	328,121	11,631	21,106
2006	335,718	11,988	21,732
2007	341,705	12,199	22,065
2008	350,442	12,722	22,800
<b>Growth Rate</b>			
2000 - 2008	1.58%	2.59%	1.95%

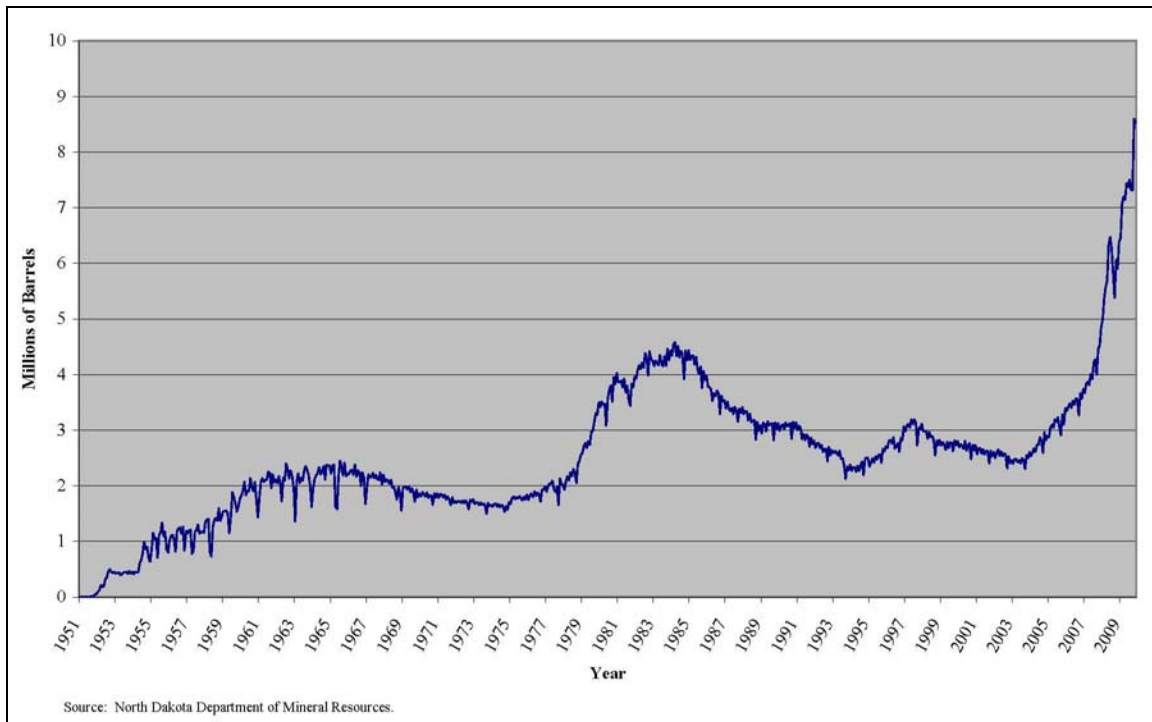
Source: Job Service North Dakota, Labor Market Information Center, QCEW Unit.

## PETROLEUM INDUSTRY

The petroleum industry has been an important factor in western North Dakota for sixty years. Oil production began in the Williston Basin in 1951, and rose and fell over the next fifty years, as shown in Figure 1. Production began to increase dramatically in 2004 reaching 7.5 million barrels per month at the end of 2009 as a result of new well completions in the Bakken Formation.

**Figure 1**

### NORTH DAKOTA HISTORICAL MONTHLY OIL PRODUCTION



The Bakken and Three Forks Formations are estimated to contain 4.0 billion barrels of recoverable oil. The importance of the Bakken Formation to oil production in North Dakota is demonstrated below. Oil production was 7.4 million barrels in 2007 and rose to 49.3 million barrels in 2009, representing over 60 percent of North Dakota’s oil production. During this three-year period, the number of producing wells in the Bakken Formation increased from 457 in 2007 to 1,341 wells in 2009.

<u>Year</u>	<u>Bakken Formation</u>	<u>North Dakota</u>	<u>Bakken Percent</u>
2007	7,400,000	44,700,000	16.6 %
2008	27,300,000	62,400,000	43.8
2009	49,300,000	79,300,000	62.2

Source: North Dakota Department of Mineral Resources.

### Petroleum Industry Economic Impacts

Future impacts of the petroleum industry on the Dickinson area economy are important to retailers and other businesses. The significance of the petroleum industry is demonstrated by findings contained in a North Dakota State University report: *Estimating Petroleum Industry’s*



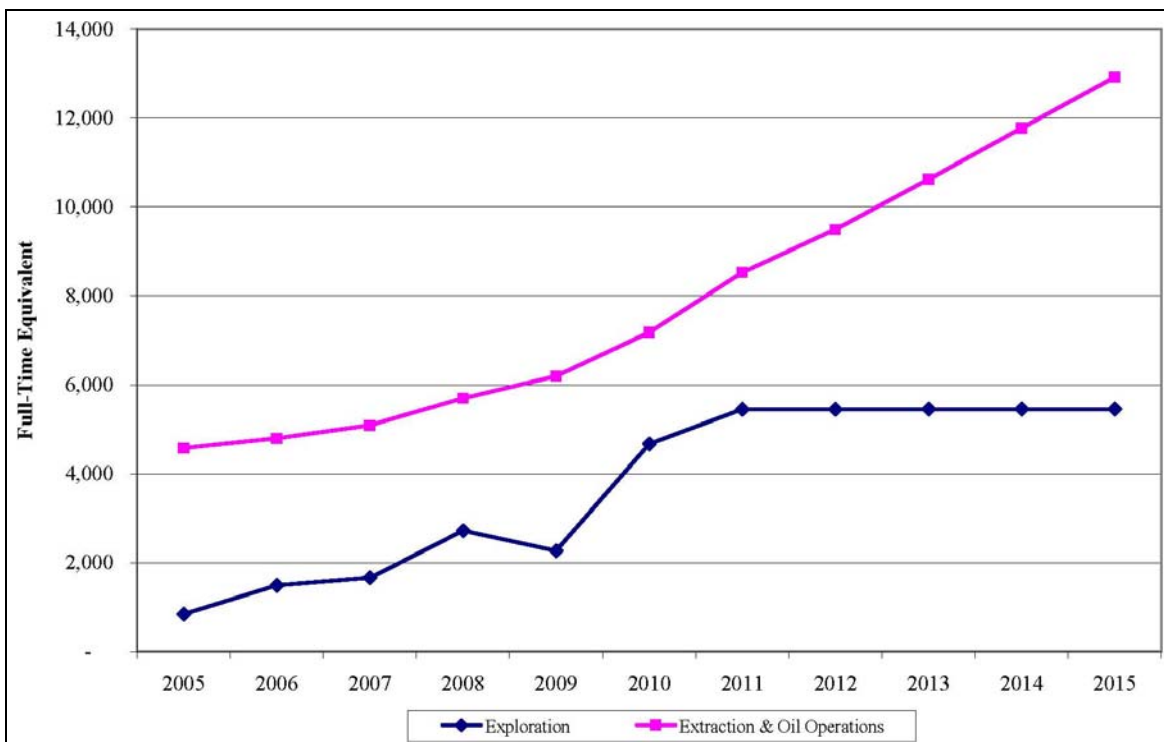
*Economic Contribution to North Dakota in 2007*, published in January 2009. Direct employment in exploration was 2,458 full-time equivalent (FTE) jobs. Drilling rig employees, in most cases, are brought in from other oil producing areas and work 12-hour daily shifts for two weeks with one week off. They return home for the week off. These workers have minimal impact on the local economy as they maintain a permanent residence outside North Dakota. This schedule equals 1.5 FTE's indicating that 2,458 exploration FTE jobs may represent as few as 1,640 employees. Employment in extraction and oil operation was estimated at 5,086 FTE's.

Future employment in the petroleum industry in North Dakota is related to the number of operating drilling rigs and the increase in producing wells. North Dakota statistics indicate that in December 2009, there were 75 rigs operating in North Dakota; by April 2010, the number had increased to 112 rigs, and in early June a total of 122 rigs were operating. Some industry officials believe that the number of rigs will reach 150 during 2010.

With projected drilling activity to exceed over 140 drilling rigs, employment in exploration will increase significantly. Estimated exploration direct employment has increased steadily from 842 in 2005 to 2,263 in 2009, as shown in Figure 2. However, if the number of drilling rigs stabilizes in the area of 140 to 150 rigs, direct employment supported by exploration will level off at about 5,450 jobs.

**Figure 2**

**PETROLEUM INDUSTRY DIRECT FTE EMPLOYMENT**



The increase in producing wells will result in growing FTE employment related to production and oil operations. As the number of producing wells increase FTE employment is estimated to more than double from 6,193 in 2009 to 12,925 in 2015.

Employment generated by oil extraction and operations are more stable year-round jobs, which will continue to grow as producing wells increase and can support an increase in households as

workers migrate to North Dakota and establish permanent residences. This employment growth will be more beneficial to the retail and shopping center industry.

Due to the high levels of successful well completions, industry participants anticipate that a high level of drilling activity could continue for 10 to 20 years until the Bakken and Three Forks Formations have been completely penetrated.

### **Future Developments**

South Heart Coal LLC is pursuing permits for a coal mine and gasification plant about four miles southwest of South Heart, North Dakota. South Heart is about 10 miles west of Dickinson. The mine would have annual production of about 2.5 million tons and the adjacent power plant would generate 175 mega watts of electricity. South Heart Coal officials hope the plant will be operational in 2015. Construction is estimated to employ 1,000 to 1,500 workers for two years. Annual employment is estimated to range from 250 to 300 workers.

A unit train loading facility for petroleum products has been proposed for location west of Dickinson. This facility would employ 30 to 100 workers.

A local developer is planning a 77-room Hampton Inn & Suites, which is expected to begin construction in June 2010, with a June 2011 opening.

Residential development is picking up with several housing developments in the planning stages. These include:

- Dakota Crossing with 114 apartments, 20 townhomes, and 17,000 square feet of commercial space.
- Painted Canyon Estates with ten ½-acre residential lots.
- Painted Canyon Subdivision with 81 gated residential lots.
- Diamond Acres Subdivision with 123 single family lots, 72 townhome lots, 16 commercial lots, and a nine-hole golf course.
- Prairie Hills Sixth with ten twin lots and 113,000 square feet of commercial space at State Avenue and 15<sup>th</sup> Street.
- State Addition with 82 single family lots, 108 twin lots, 18 acres of multi-family, and 13 acres of commercial space.

These proposed developments represent over 650 dwelling units to accommodate workers and their families.

## SUPPORTABLE GROSS LEASABLE AREA

Dickinson has the potential to support additional retail stores. Estimated supportable gross leasable area by store type is contained in Table 8. In almost every category, supportable space exceeds medial store size. Existing stores are included in supportable space and need to be considered in determining the potential in individual categories.

Table 8  
DICKINSON SUPPORTABLE RETAIL SPACE  
BY MERCHANDISE CATEGORY  
(Gross Leasable Area)

Merchandise Category	2010	2015	2020	Store Size		
				High	Median	Low
<b>CONVENIENCE GOODS</b>						
<b>Food Stores</b>						
Grocery stores	161,778	218,385	278,545	65,888	52,500	31,676
Supermarkets	161,103	217,478	277,383	69,462	52,419	31,245
Convenience food	673	907	1,160	5,323	2,085	1,349
Specialty food stores	6,065	8,185	10,440	6,000	2,400	1,188
<b>Other Convenience Goods</b>						
Drug & proprietary stores	53,704	72,498	92,470	23,714	11,700	8,280
Hardware	14,016	18,919	24,130	27,743	13,831	5,638
Liquor	11,584	15,637	19,947	7,210	2,856	1,305
Florist	4,784	6,463	8,242	5,396	1,600	766
Food/health supplement stores	1,348	1,816	2,320	1,968	1,234	1,200
<b>Food Service</b>						
Full-service restaurants	42,858	54,808	69,908	9,775	4,500	2,000
Limited service restaurants	33,823	43,250	55,165	3,400	3,000	1,335
Cafeterias	3,698	4,723	6,030	10,049	1,073	517
Snack & beverage places	2,743	3,510	4,470	2,495	1,500	850
Specialized food places	1,278	2,048	2,610		N/A	
<b>Drinking Places</b>	14,904	19,056	24,308		2,750	
<b>Gasoline Svs Stations/Conv.</b>						
Gas/Convenience food stores	20,945	26,786	34,164	6,571	2,400	1,451
<b>OTHER RETAIL STORES</b>						
<b>Building Materials &amp; Garden Supplies</b>						
Building materials & supplies stores						
Home centers	53,034	67,826	86,511	135,833	95,173	8,981
Paint, glass & wallpaper	8,662	11,080	14,133	5,028	3,533	2,348
Other building materials dealers	187,582	239,893	305,978	N/A	N/A	N/A
Lawn & garden equipment						
Outdoor power equipment	11,590	14,820	18,910	N/A	N/A	N/A
Retail nurseries, lawn & garden	49,530	63,340	80,790	N/A	15,000	N/A
<b>Motor Vehicles &amp; Parts Dealers</b>						
Auto parts & accessories stores	59,620	76,240	97,245	13,000	6,500	2,232
Tire dealers	40,570	51,890	66,180	5,000	2,500	1,500

Source: McComb Group, Ltd.

Table 8 (continued)  
DICKINSON SUPPORTABLE RETAIL SPACE  
BY MERCHANDISE CATEGORY  
(Gross Leasable Area)

Merchandise Category	2010	2015	2020	Store Size		
				High	Median	Low
<b>SHOPPING GOODS</b>						
<b>General Merchandise</b>						
<b>Department stores (Incl. leased depts.)</b>						
Discount stores	279,284	380,988	485,932	127,987	92,681	70,000
Department Stores	88,333	120,498	153,689	192,195	104,560	51,125
<b>Other general merchandise stores</b>						
Warehouse Clubs and Supercenters	21,113	28,802	36,738	225,000	185,000	150,000
Dollar stores	2,800	3,818	4,873	13,788	8,000	2,726
Miscellaneous general mdse.	44,792	96,012	122,460	11,212	8,400	3,200
<b>Apparel &amp; Accessories</b>						
<b>Clothing Stores</b>						
Mens and boys	2,182	2,977	3,795	5,635	4,000	2,002
Womens clothing	13,800	18,820	24,005	8,740	4,200	2,074
Children's & infant	833	1,138	1,450	6,000	3,912	1,490
Family clothing	19,996	27,277	34,788	28,228	8,000	2,374
Clothing accessories stores	966	1,321	1,679	2,001	1,400	918
Other clothing stores	3,019	4,117	5,253	8,234	2,300	1,060
<b>Shoe Stores</b>						
Men's	293	400	510	2,186	1,640	903
Women's	441	604	767	3,158	2,384	1,309
Children's & infant	138	190	238	6,000	3,912	1,490
Family shoe stores	4,114	5,617	7,154	10,234	3,388	2,021
Athletic footwear	2,743	3,743	4,771	11,314	3,284	1,535
<b>Furniture &amp; Home Furnishings</b>						
Furniture	16,919	23,081	29,435	36,712	7,927	3,108
Floor coverings	15,996	21,818	27,836	7,819	3,593	1,229
Window treatment stores	190	262	329	9,934	4,905	1,489
All other home furnishings stores	7,543	10,286	13,120	6,500	3,570	2,868
<b>Electronics &amp; Appliances Stores</b>						
Household appliance stores	5,527	7,538	9,615		9,090	
Radio, tv & electronics stores	21,597	58,917	75,147	44,446	2,526	1,789
Computers, Software, Music, & other electronics	5,516	7,524	9,598	25,600	3,388	997
<b>Other Shopping Goods</b>						
Sporting goods	24,195	33,005	42,095	44,116	7,500	2,238
General Line Sporting Gds.	19,995	27,275	34,785	28,128	5,850	3,765
Specialty Line Sporting Gds.	3,733	5,089	6,493	4,356	2,449	1,097
Book stores & newsdealers	15,594	26,600	33,919	29,974	4,542	2,428
Stationery Stores and Office Supply	22,520	38,403	48,984	2,247	1,033	585
Musical Instrument & Supplies	2,129	2,913	3,713	26,094	7,324	2,432
Jewelry stores	12,994	17,723	22,606	3,410	1,450	790
Hobby, toy & game	6,857	9,354	11,931	25,861	4,050	1,604
Camera & photographic supply	873	1,193	1,516	5,965	2,200	816
Gift, novelty & souvenirs	14,400	19,633	25,047	7,015	4,422	2,369
Sewing, needlework & piece goods	10,880	14,840	18,920	19,299	12,202	2,678
Pet stores	2,555	3,495	4,455	12,398	3,200	1,847
Art dealers	178	244	307	2,401	1,434	675
Optical goods stores	5,072	6,924	8,828	4,068	1,561	885
Pre-Recorded Tapes, Compact Discs	3,652	4,978	6,352	12,753	3,426	1,308
Cosmetics, beauty supplies & perfume	1,666	2,272	2,897	6,235	1,953	1,102
All other health & personal care	4,800	6,545	8,349	3,084	1,786	697
Other Misc. Store Retailers	1,619	2,206	2,818	19,977	2,000	1,001

Table 8 (continued)

DICKINSON SUPPORTABLE SERVICE SPACE  
BY SERVICES CATEGORY  
(Gross Leasable Area)

Category	2010	2015	2020	Store Size		
				High	Median	Low
<b>Personal Care Services</b>						
Beauty Shops	16,805	21,489	27,411	3,480	1,400	900
Diet & weight reducing services	3,627	4,647	5,920	3,130	1,856	1,223
Other personal care services	1,851	2,366	3,017	4,128	1,488	703
<b>Drycleaning &amp; Laundry Services</b>						
Coin-operated laundries & drycleaners	2,517	3,200	4,083	3,734	2,024	1,222
Drycleaning & laundry services (except coin-op.)	2,260	2,887	3,680	2,731	1,608	1,038
<b>Other Personal Services</b>						
One Hour Photo Finishing	555	712	905	3,365	1,120	641
Child Day Care Services	37,990	48,590	61,960	7,495	5,050	3,059
Pet Care	4,120	5,280	6,747		1,200	
<b>Rental and Leasing</b>						
Video tape and disc rental	11,205	14,335	18,280	7,341	5,836	3,740
<b>Recreation</b>						
Bowling Centers	2,491	3,173	4,055	N/A	N/A	N/A
Physical fitness facilities	3,425	4,363	5,575	32,170	6,448	1,433
<b>Professional Services</b>						
Offices of real estate agents & brokers	10,453	13,373	17,053	6,264	2,092	711
<b>Household Goods Repair</b>						
Home & Garden Equipment & Appliance Repair	2,960	3,777	4,823			
Reupholstery & furniture repair	1,065	1,361	1,729		600	
Footwear & leather goods repair	606	774	994	742	648	405
Watch, clock & jewelry repair	303	387	490		900	
Garment repair & alteration services	568	520	657	1,488	1,185	680
<b>Automotive Repair and Maintenance</b>						
General automotive repair	30,010	38,380	48,960	10,624	6,200	2,400
Automotive exhaust system repair	1,530	1,955	2,495			
Automotive transmission repair	3,405	4,360	5,560			
Brake, front end & wheel alignment	705	900	1,155			
Paint or body repair shops	39,000	49,880	63,625			
Automotive glass replacement	6,935	8,865	11,305			
Carwashes	7,045	9,020	11,500			
Subtotal	191,431	244,594	311,979			
<b>Health Care</b>						
Offices of physicians						
Offices of physicians (except mental health specialists)	77,270	98,821	126,046	4,008	1,652	969
Offices of physicians, mental health specialists	740	940	1,204		1,800	
Offices of dentists	53,568	68,512	87,386		1,700	
Offices of other health practitioners						
Offices of chiropractors	10,064	12,872	16,416		1,600	
Offices of optometrists	12,716	16,260	20,740	4,347	1,620	1,074
Offices of mental health practitioners (except physicians)	561	716	916		1,800	
Offices of physical, occup, & speech therapists & audiologists						
Speech therapist & audiologists	608	776	988		1,600	
Physical & occupational therapists	2,320	2,968	3,784		1,600	
Offices of all other health practitioners						
Offices of podiatrists	326	414	530		1,800	
Offices of all other misc. health practitioners	561	716	916		1,800	
Subtotal	158,734	202,995	258,010			
Total	350,165	447,589	569,989			

Source: McComb Group, Ltd.

# **APPENDIX A**

Table A-1

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
POPULATION AND HOUSEHOLDS: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

Trade Area / Year	Population		Households	
	Number	Rate of Change	Number	Rate of Change
<b>City of Dickinson</b>				
1990	13,080	N/A	4,997	N/A
2000	16,056	2.07 %	6,534	2.72 %
2010 E	17,179	0.75	7,306	1.25
2015 E	18,716	1.73	8,256	2.48
<b>Dickinson Trade Area</b>				
1990	98,130	N/A	37,090	N/A
2000	92,130	(0.63) %	36,923	(0.05) %
2010 E	90,946	(0.14)	38,374	0.43
2015 E	94,187	0.70	40,279	0.97
<b>United States</b>				
1990	247,051,287	N/A	91,402,228	N/A
2000	279,583,437	1.24 %	104,855,261	1.38 %
2010 E	306,341,111	1.02	114,634,696	1.00
2015 E	320,531,289	0.91	120,600,367	1.02

N/A: Not Available.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table A-2

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
AVERAGE AND MEDIAN HOUSEHOLD INCOMES  
1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

Income Type / Year	City of Dickinson	Dickinson Trade Area	United States
<b>Average Household Income</b>			
1990	\$ 27,502	\$ 26,926	\$ 38,374
2000	39,136	38,931	56,653
2010 E	59,598	52,775	72,075
2015 E	69,240	58,406	78,123
<b>Median Household Income</b>			
1990	\$ 23,983	\$ 23,075	\$ 30,214
2000	32,306	31,639	42,751
2010 E	45,504	41,273	51,900
2015 E	52,955	45,528	55,483

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table A-3

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
HOUSEHOLD INCOME: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

	1990		2000		2010 E		2015 E	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<b>City of Dickinson</b>								
Households	4,997	N/A	6,534	N/A	7,306	N/A	8,256	N/A
Average Size	2.51	N/A	2.33	N/A	2.23	N/A	2.26	N/A
Household Income								
Median	\$ 23,983	N/A	\$ 32,306	N/A	\$ 45,504	N/A	\$ 52,955	N/A
Average	\$ 27,502	N/A	\$ 39,136	N/A	\$ 59,598	N/A	\$ 69,240	N/A
Households Above \$50,000	674	13.5 %	1,735	26.6 %	3,372	46.2 %	4,401	53.3 %
Households Above \$75,000	136	2.7	656	10.0	1,980	27.1	2,734	33.1
Income Distribution								
Less than \$15,000	1,643	32.9 %	1,541	23.6 %	1,306	17.9 %	1,291	15.6 %
\$15,000 - \$24,999	1,099	22.0	967	14.8	764	10.5	736	8.9
\$25,000 - \$34,999	801	16.0	1,043	16.0	743	10.2	686	8.3
\$35,000 - \$49,999	783	15.7	1,248	19.1	1,121	15.3	1,143	13.8
\$50,000 - \$74,999	538	10.8	1,079	16.5	1,392	19.1	1,667	20.2
\$75,000 - \$99,999	99	2.0	342	5.2	875	12.0	1,207	14.6
\$100,000 - \$149,999	30	0.6	242	3.7	807	11.0	1,107	13.4
\$150,000 +	8	0.2	72	1.1	298	4.1	420	5.1
<b>Dickinson Trade Area</b>								
Households	37,090	N/A	36,923	N/A	38,374	N/A	40,279	N/A
Average Size	2.59	N/A	2.42	N/A	2.37	N/A	2.34	N/A
Household Income								
Median	\$ 23,075	N/A	\$ 31,639	N/A	\$ 41,273	N/A	\$ 45,528	N/A
Average	\$ 26,926	N/A	\$ 38,931	N/A	\$ 52,775	N/A	\$ 58,406	N/A
Households Above \$50,000	3,733	10.9 %	9,389	25.4 %	15,547	40.5 %	18,288	45.4 %
Households Above \$75,000	858	2.5	3,503	9.5	8,048	21.0	10,108	25.1
Income Distribution								
Less than \$15,000	11,040	32.3 %	8,219	22.3 %	6,261	16.3 %	5,857	14.5 %
\$15,000 - \$24,999	8,039	23.5	6,580	17.8	5,417	14.1	5,071	12.6
\$25,000 - \$34,999	5,698	16.7	5,883	15.9	4,842	12.6	4,779	11.9
\$35,000 - \$49,999	5,644	16.5	6,852	18.6	6,307	16.4	6,284	15.6
\$50,000 - \$74,999	2,875	8.4	5,886	15.9	7,499	19.5	8,180	20.3
\$75,000 - \$99,999	540	1.6	1,983	5.4	4,029	10.5	4,971	12.3
\$100,000 - \$149,999	229	0.7	999	2.7	2,807	7.3	3,564	8.8
\$150,000 +	89	0.3	521	1.4	1,212	3.2	1,573	3.9
<b>United States</b>								
Households	91,402,228	N/A	104,855,261	N/A	114,634,696	N/A	120,600,367	N/A
Average Size	2.63	N/A	2.59	N/A	2.60	N/A	2.59	N/A
Household Income								
Median	\$ 30,214	N/A	\$ 42,751	N/A	\$ 51,900	N/A	\$ 55,483	N/A
Average	\$ 38,374	N/A	\$ 56,653	N/A	\$ 72,075	N/A	\$ 78,123	N/A
Households Above \$50,000	22,302,207	24.4 %	44,021,805	42.0 %	58,823,773	51.3 %	65,412,212	54.2 %
Households Above \$75,000	8,644,712	9.5	23,606,167	22.5	37,070,976	32.3	42,805,014	35.5
Income Distribution								
Less than \$15,000	22,256,335	24.3 %	16,605,189	15.8 %	14,689,556	12.8 %	14,389,707	11.9 %
\$15,000 - \$24,999	16,036,700	17.5	13,450,479	12.8	12,361,278	10.8	12,226,920	10.1
\$25,000 - \$34,999	14,489,716	15.9	13,435,521	12.8	12,298,168	10.7	12,135,976	10.1
\$35,000 - \$49,999	16,317,430	17.9	17,342,267	16.5	16,461,921	14.4	16,435,552	13.6
\$50,000 - \$74,999	13,657,495	14.9	20,415,638	19.5	21,752,797	19.0	22,607,198	18.7
\$75,000 - \$99,999	4,650,869	5.1	10,725,335	10.2	14,293,174	12.5	15,929,967	13.2
\$100,000 - \$149,999	2,564,096	2.8	8,084,326	7.7	13,805,997	12.0	16,221,828	13.5
\$150,000 +	1,429,747	1.6	4,796,506	4.6	8,971,805	7.8	10,653,219	8.8

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.



Table A-4

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
HOUSEHOLDS, FAMILIES AND HOUSEHOLD SIZE; 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

	1990		2000		2010 E		2015 E	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<b>City of Dickinson</b>								
Households	4,997		6,534		7,306		8,256	
Families	3,410		4,079		4,283		4,701	
As Percent of Households		68.2 %		62.4 %		58.6 %		56.9 %
<b>Household Size</b>								
1 Person	N/A	N/A %	2,073	31.7 %	2,359	32.3 %	2,659	32.2 %
2 Persons	N/A	N/A	2,193	33.6	2,650	36.3	2,957	35.8
3-4 Persons	N/A	N/A	1,760	26.9	1,845	25.2	2,102	25.5
5+ Persons	N/A	N/A	508	7.8	452	6.2	538	6.5
Average Household Size	2.51		2.33		2.23		2.26	
<b>Dickinson Trade Area</b>								
Households	37,090		36,923		38,374		40,279	
Families	26,852		24,801		25,085		25,964	
As Percent of Households		72.4 %		67.2 %		65.4 %		64.5 %
<b>Household Size</b>								
1 Person	N/A	N/A %	10,817	29.3 %	11,597	30.2 %	12,338	30.6 %
2 Persons	N/A	N/A	12,939	35.0	14,626	38.1	14,825	36.8
3-4 Persons	N/A	N/A	9,777	26.5	9,428	24.6	10,016	24.9
5 + Persons	N/A	N/A	3,390	9.2	2,723	7.1	3,100	7.7
Average Household Size	2.59		2.42		2.37		2.34	
<b>United States</b>								
Households	91,402,228		104,855,261		114,634,696		120,600,367	
Families	64,121,654		71,347,942		76,060,980		78,978,314	
As Percent of Households		70.2 %		68.0 %		66.4 %		65.5 %
<b>Household Size</b>								
1 Person	N/A	N/A %	27,089,863	25.8 %	31,877,372	27.8 %	34,755,470	28.8 %
2 Persons	N/A	N/A	34,230,383	32.6	34,902,271	30.4	35,891,433	29.8
3-4 Persons	N/A	N/A	32,207,786	30.7	34,719,001	30.3	36,094,111	29.9
5 + Persons	N/A	N/A	11,327,229	10.8	13,136,052	11.5	13,859,353	11.5
Average Household Size	2.63		2.59		2.60		2.59	

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table A-5

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
EDUCATIONAL ATTAINMENT: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

Attainment	1990		2000		2010 E		2015 E	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<b>City of Dickinson</b>								
No College	2,218	37.1 %	2,468	30.8 %	3,088	31.9 %	3,575	32.6 %
Some College/2 yr. Degree	2,340	39.1	3,104	38.7	3,957	40.9	4,609	42.0
College Graduate	1,030	17.2	1,856	23.1	2,050	21.2	2,206	20.1
Graduate School	394	6.6	590	7.4	575	5.9	583	5.3
<b>Dickinson Trade Area</b>								
No College	19,492	43.3 %	19,368	39.3 %	20,957	39.6 %	22,647	39.8 %
Some College/2 yr. Degree	17,587	39.1	19,296	39.1	20,690	39.1	22,252	39.1
College Graduate	6,282	14.0	8,327	16.9	8,974	16.9	9,606	16.9
Graduate School	1,636	3.6	2,312	4.7	2,351	4.4	2,444	4.3
<b>United States</b>								
No College	47,207,515	39.9 %	51,777,198	35.6 %	60,292,138	34.9 %	64,769,509	34.6 %
Some College/2 yr. Degree	39,130,457	33.1	49,433,254	34.0	55,872,964	32.3	59,117,129	31.5
College Graduate	20,603,802	17.4	28,072,442	19.3	35,806,179	20.7	40,035,393	21.4
Graduate School	11,363,269	9.6	16,028,464	11.0	20,861,651	12.1	23,515,815	12.5

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table A-6

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
AGE DISTRIBUTION: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

Age Distribution	1990		2000		2010 E		2015 E	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<b>City of Dickinson</b>								
Under 5	976	7.5 %	928	5.8 %	1,106	6.4 %	1,300	6.9 %
5 - 9	1,136	8.7	1,074	6.7	932	5.4	1,133	6.1
10 - 14	994	7.6	1,142	7.1	891	5.2	976	5.2
15 - 19	994	7.6	1,539	9.6	1,219	7.1	1,071	5.7
20 - 24	929	7.1	1,404	8.7	1,721	10.0	1,471	7.9
25 - 34	2,232	17.1	1,733	10.8	2,605	15.2	3,267	17.5
35 - 44	1,752	13.4	2,411	15.0	1,648	9.6	1,868	10.0
45 - 54	1,112	8.5	1,995	12.4	2,273	13.2	2,063	11.0
55 - 64	1,012	7.7	1,243	7.7	1,887	11.0	2,361	12.6
65 - 74	1,008	7.7	1,182	7.4	1,247	7.3	1,560	8.3
75 +	933	7.1	1,405	8.8	1,650	9.6	1,645	8.8
25 - 64	6,109	46.7 %	7,382	46.0 %	8,413	49.0 %	9,559	51.1 %
65 and Over	1,941	14.8	2,587	16.1	2,897	16.9	3,205	17.1
<b>Dickinson Trade Area</b>								
Under 5	7,411	7.7 %	5,066	5.5 %	5,402	5.9 %	6,114	6.5 %
5 - 9	8,799	9.1	6,254	6.8	4,816	5.3	5,493	5.8
10 - 14	8,228	8.5	7,518	8.2	5,055	5.6	4,975	5.3
15 - 19	6,322	6.5	7,908	8.6	6,011	6.6	5,178	5.5
20 - 24	4,016	4.2	4,332	4.7	6,807	7.5	6,240	6.6
25 - 34	14,995	15.5	8,599	9.3	10,846	11.9	13,448	14.3
35 - 44	14,217	14.7	14,508	15.7	8,737	9.6	8,590	9.1
45 - 54	8,965	9.3	13,276	14.4	13,789	15.2	11,202	11.9
55 - 64	8,623	8.9	8,592	9.3	12,861	14.1	14,690	15.6
65 - 74	8,218	8.5	7,754	8.4	7,812	8.6	9,727	10.3
75 +	6,813	7.1	8,323	9.0	8,811	9.7	8,530	9.1
25 - 64	46,800	48.4 %	44,975	48.8 %	46,233	50.8 %	47,930	50.9 %
65 and Over	15,031	15.6	16,077	17.5	16,623	18.3	18,257	19.4
<b>United States</b>								
Under 5	18,216,323	7.4 %	19,050,045	6.8 %	20,971,275	6.8 %	21,601,266	6.7 %
5 - 9	17,966,536	7.3	20,410,754	7.3	20,355,661	6.6	21,262,485	6.6
10 - 14	16,997,174	6.9	20,388,305	7.3	19,998,702	6.5	20,792,228	6.5
15 - 19	17,644,373	7.1	20,088,794	7.2	20,849,707	6.8	20,408,999	6.4
20 - 24	18,888,290	7.6	18,840,701	6.7	21,132,649	6.9	21,210,798	6.6
25 - 34	42,862,271	17.3	39,631,091	14.2	41,285,735	13.5	42,916,627	13.4
35 - 44	37,297,467	15.1	44,843,302	16.0	41,468,981	13.5	41,102,646	12.8
45 - 54	25,060,382	10.1	37,412,020	13.4	43,896,123	14.3	43,506,466	13.6
55 - 64	21,024,328	8.5	24,122,973	8.6	35,545,290	11.6	40,709,438	12.7
65 - 74	18,012,357	7.3	18,283,216	6.5	21,787,920	7.1	27,132,251	8.5
75 +	13,082,100	5.3	16,512,236	5.9	19,049,068	6.2	19,888,085	6.2
25 - 64	126,244,448	51.1 %	146,009,386	52.2 %	162,196,129	52.9 %	168,235,177	52.5 %
65 and Over	31,094,457	12.6	34,795,452	12.4	40,836,988	13.3	47,020,336	14.7

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table A-7

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
GENDER AND MARITAL STATUS: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

Ethnicity	1990		2000		2010 E		2015 E	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<b>City of Dickinson</b>								
<b>Gender</b>								
Male	6,295	48.1 %	7,776	48.4 %	8,332	48.5 %	9,096	48.6 %
Female	6,785	51.9	8,280	51.6	8,847	51.5	9,620	51.4
<b>Marital Status</b>								
Single	4,053	40.7 %	255	6.3 %	164	4.0 %	179	3.8 %
Single With Children	N/A	N/A	516	12.7	524	12.8	586	12.5
Married	5,899	59.3	3,307	81.1	3,396	83.2	3,936	83.7
<b>Dickinson Trade Area</b>								
<b>Gender</b>								
Male	48,848	49.8 %	45,547	49.4 %	45,109	49.6 %	46,811	49.7 %
Female	49,282	50.2	46,583	50.6	45,837	50.4	47,376	50.3
<b>Marital Status</b>								
Single	24,924	34.5 %	1,193	4.8 %	1,140	4.5 %	1,173	4.5 %
Single With Children	N/A	N/A	2,661	10.7	2,721	10.8	2,827	10.9
Married	47,216	65.5	20,947	84.5	21,223	84.6	21,963	84.6
<b>United States</b>								
<b>Gender</b>								
Male	120,385,660	48.7 %	137,120,780	49.0 %	151,142,075	49.3 %	158,559,303	49.5 %
Female	126,665,627	51.3	142,462,657	51.0	155,199,036	50.7	161,971,986	50.5
<b>Marital Status</b>								
Single	87,652,149	45.2 %	5,857,127	8.2 %	6,715,357	8.8 %	7,227,289	9.2 %
Single With Children	N/A	N/A	11,329,978	15.9	12,965,815	17.0	13,938,252	17.6
Married	106,219,419	54.8	54,160,837	75.9	56,379,808	74.1	57,812,773	73.2

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table A-8

CITY OF DICKINSON, DICKINSON TRADE AREA AND UNITED STATES  
ETHNICITY: 1990 AND 2000 CENSUS; 2010 AND 2015 ESTIMATED

Ethnicity	1990		2000		2010 E		2015 E	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<b>City of Dickinson</b>								
Caucasian	12,906	98.7 %	15,606	97.2 %	16,579	96.5 %	17,976	96.0 %
African-American	14	0.1	44	0.3	111	0.6	159	0.9
Native American	93	0.7	184	1.1	261	1.5	294	1.6
Asian/Pacific Islander	47	0.4	42	0.3	68	0.4	88	0.5
Other	20	0.2	180	1.1	159	0.9	198	1.1
Hispanic (any race)	73	0.6 %	166	1.0 %	265	1.5 %	348	1.9 %
<b>Dickinson Trade Area</b>								
Caucasian	95,057	96.9 %	87,387	94.9 %	85,684	94.2 %	88,548	94.0 %
African-American	50	0.1	137	0.1	302	0.3	394	0.4
Native American	2,548	2.6	3,142	3.4	3,552	3.9	3,621	3.8
Asian/Pacific Islander	239	0.2	206	0.2	274	0.3	317	0.3
Other	236	0.2	1,258	1.4	1,134	1.2	1,307	1.4
Hispanic (any race)	670	0.7 %	894	1.0 %	1,451	1.6 %	1,782	1.9 %
<b>United States</b>								
Caucasian	198,900,843	80.5 %	210,731,990	75.4 %	244,491,247	79.8 %	253,557,035	79.1 %
African-American	29,936,414	12.1	34,614,400	12.4	39,661,096	12.9	41,899,338	13.1
Native American	1,868,437	0.8	2,374,378	0.8	3,054,011	1.0	3,331,128	1.0
Asian/Pacific Islander	6,568,561	2.7	9,996,001	3.6	13,983,836	4.6	15,754,996	4.9
Other	9,777,032	4.0	21,866,668	7.8	5,150,921	1.7	5,988,792	1.9
Hispanic (any race)	22,254,866	9.0 %	35,192,267	12.6 %	49,003,054	16.0 %	56,381,748	17.6 %

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.