

**MO-MOTO OHV Incorporated**  
**OHV Tourism Economic Impact Overview**  
**2018**



Economic and Business Engagement Center

Prepared For  
Mo-Moto OHV Inc.

Prepared By  
Southeast Missouri State University's Economic and Business Engagement Center

Kelli Behrle, Project Coordinator  
Jakob Pallesen, MBA

### Engagement Center Mission

To foster business, community, and workforce development and facilitate the process of innovation to enhance the regional economy and support the transfer of institutional knowledge and resources derived from within the University to the external environment to create new, high-value jobs, positive economic and social benefits, and advance entrepreneurship.

### History

In 2003, the Innovation Center and closely allied nonprofit organization Missouri Research Corporation were launched to support Southeast Missouri State University's strategic priority to advance the region's economic appeal and strength by accelerating local and regional economic growth and development. Over the next several years, those entities' efforts included offering business development services, business incubator space, entrepreneurial training, access to capital, research and technical assistance, and more. In 2006, the entities partnered with the Kauffman Foundation and the Delta Regional Authority to offer trainings for aspiring and early-stage entrepreneurs in Missouri, Kentucky, and Tennessee. By 2011, there had been over 600 participants trained through the program resulting in 281 new businesses. The Kauffman Foundation then joined with the nonprofit to continue the development and distribution of the program nationwide to over 150 affiliate organizations. In 2013, the U.S. Department of Commerce awarded the entities with designation as an Economic Development Administration (EDA) University Center and the nonprofit was renamed the Missouri Innovation Corporation (MIC) to reflect its development into more entrepreneurial and economic development activity. With this rapid growth of both outreach and student-focused efforts, there was a separation to better serve each group resulting in the now Economic and Business Engagement Center primarily serving the external community.

## Summary

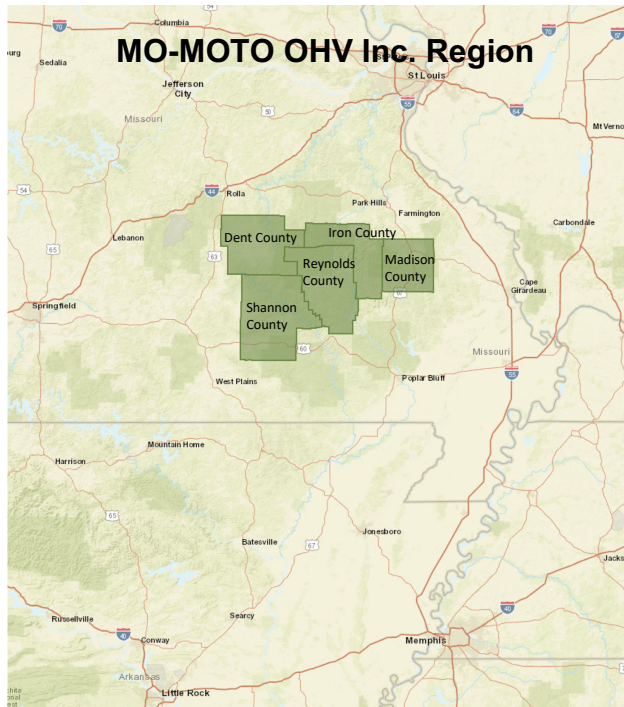
MO-MOTO OHV Inc., is a nonprofit community organization seeking to spur economic revitalization in South East Missouri through development of partnerships with land managers and land owners, in a five county area. MO-MOTO OHV Inc. finds a significant need within the state and throughout the Mid-Western United States for well managed facilities targeting trail oriented recreation for off highway vehicle (OHV) enthusiasts. The goal is to create and empower a joint development entity to work with landowners, county officials and community leaders, state and federal government agencies, recreational user groups and other interested parties. The organization hopes to enable and facilitate the implementation of an authoritative party to diversify the economy and attract additional tourism to the natural resources of South East Missouri.

Key data points:

- Nearly 40% of Missouri tourists reported visiting natural resource sites.
- The average OHV rider reportedly spends a minimum of \$100 on a single day trip.
- 3.2 million of the Midwest's 15.4 million residents participated in OHV recreation.
- \$412 billion is contributed to the U. S. economy through the outdoor recreation industry alone.
- First year MO-MOTO OHV impact is estimated to create 21 new jobs and increase earnings and taxes on production and imports.

## Introduction and Project Background

The MO-MOTO Off Highway Vehicle (OHV) tourism economic impact overview consists of providing key elements of secondary data related to tourism and OHV market spending in Dent, Iron, Madison, Reynolds, and Shannon counties of Missouri to help determine the impact of supporting entrepreneurship in distressed counties as well as enhance overall economic opportunities.



Communities across America are reaping economic rewards from trail systems. Specifically, purchases of ATVs, UTVs, all-terrain vehicles and dirt bikes directly and indirectly effect local economies. Nationally, an economic impact total from OHV recreation has been reported at \$68,000,000,000 by the National Off-Highway Vehicle Conservation Council report.

According to 2018 ESRI Sports and Leisure Market Potential reporting, 1,512 residents from the five county service region participated in motorcycling in the last 12 months and 3,244 households own an ATV/UTV vehicle in the five county region. In the state of Missouri alone, 7.4% of the total population own an ATV/UTV.

### Automotive Recreation Market Potential

Source: ESRI

Defined Area	Number of Adults/Households Own ATV/UTV	Percent of Population
<b>Dent</b>	947	15%
<b>Iron</b>	659	14%
<b>Madison</b>	625	13%
<b>Reynolds</b>	485	17%
<b>Shannon</b>	528	15%
<b>Region</b>	3,244	15%
<b>Missouri</b>	181,225	7.4%

It is important to note, the Missouri state park system, which attracts more than 18 million visitors annually to the state parks, and historic sites, has a positive economic impact on the state and local communities. Economic impact is the net economic change in Missouri

that results from spending of visitors to state parks and historic sites. Results of economic impact study released in 2012 estimate that total annual expenditures of state park visitors in 2011 were approximately \$778 million. The overall economic impact of these expenditures is estimated at \$1.02 billion in sales, \$307 million in payroll and related income, and \$123 million in federal, state and local taxes. Also, visitors' expenditures support 14,535 jobs. For every dollar spent by Missouri State parks to operate the state park system, Missouri's economy saw \$25 return on investment. These impacts show that Missouri state parks enhance our state's economy as well as improve visitor's health and well-being.

### Regional State Park Total Visitors

Source: Missouri State Park Attendance Report 2018

Attraction	2016	2017	% Change
Current River	31,706	28,809	-9%
Echo Bluff	172,083	310,640	80%
Elephant Rocks State Park	351,653	326,394	-7%
Harry S Truman State Park	150,098	164,599	10%
Johnson Shut-Ins	368,723	377,408	2%
Montauk State Park	478,994	458,382	-4%
Mark Twain State Park	240,301	243,656	1%
Sam A Baker	1,330,936	1,022,467	-23%

Within the primary five county region of MO MOTO focus area alone there are 49 conservation areas and parks. Some of the most popular tourist attractions in Missouri were reported to have had nearly 3 million visitors in 2017.

## Regional Business Summary By SIC Codes

Source: ESRI

	Transportation	Auto Dealers, Gas Stations, Auto Aftermarket	Hotels & Lodging	Automotive Services	Eating & Drinking Places
<b>MO-MOTO Region</b>	73	85	71	76	79

The U.S. Department of Commerce's Bureau of Economic Analysis (BEA) has released a report recognizing for the first time that the outdoor recreation industry is a contributing force to the U.S. economy with \$412 billion. The outdoor recreation economy grew 1.7 percent in 2016, faster than the 1.6 percent growth for the overall U.S. economy. In addition, real gross output, compensation, and employment all grew faster in outdoor recreation than in the overall economy in 2016.

## Sports and Leisure Market Potential Overview

Source: ESRI

Defined Area	Bicycling (Mountain + Road)	Power Boating	Canoeing/Kayaking	Motorcycling	Hiking
<b>Dent</b>	819	635	501	406	753
<b>Iron</b>	636	449	381	330	612
<b>Madison</b>	820	502	530	354	733
<b>Reynolds</b>	392	305	266	191	431
<b>Shannon</b>	431	356	273	231	429
<b>Region</b>	3,098	2,247	1,951	1,512	2,958
<b>Missouri</b>	658,651	272,884	330,698	168,157	554,670

Missouri's Division Of Tourism reported a total of \$1,897,058,356 total expenditures spent in the accommodation industry including; hotel, motel, rooming and boarding houses, camps and trailer parks, campsites, and organization hotel and lodging houses in 2017. While 16 percent of visitors reported to participating in driving tours and scenic drives, 10 percent reported visiting state parks, 8 percent reported visiting fishing, boating and other water activities, 5 percent reported biking and hiking trails.

## Regional OHV Permit Sales

County	2017 Sales	2018 Sales (as of September)
<b>Iron County</b>	\$1,635	\$1,160
<b>Reynolds County</b>	\$7,390	\$4,970
<b>Shannon County</b>	\$0 (no charge)	\$1,000
<b>Madison County</b>		\$1,035
<b>Dent County</b>	\$7,110	\$6,840

## Market Demand

The SEMA-commissioned report notes that approximately 670,000 UTV models were sold from 2010 to 2012. This is consistent with other market analyses that have predicted continued healthy growth of the segment through 2015. In the United States, Southerners represent the biggest buying block for side-by-sides, accounting for a full 44% of the nation's sales volume. Next follow Midwesterners at 27% and Westerners at 21%. Even though the Northeast is the smallest region with 8% of the total sales volume, that would still imply that more than 53,600 units are operating in the region. Among the states themselves, Texas ranks first in sales, with California and Ohio coming in second and third.

### UTV Sales by Region

**The largest volume of UTV sales reside in the Southern United States.**

- Texas has the highest level of UTV sales, more than two times the volume of California.



OHV recreation is a proven financial stimulus to the tourism market with the average rider spending a minimum of \$100 on a single day trip. We should encourage struggling areas to embrace OHV tourism as we have the opportunity to directly impact and benefit financial success of local businesses. We can connect rural Missouri to OHV trails, which would provide new employment and income while bringing new money to these distressed regions. OHV tourism can diversify the economy of South East Missouri and create a culture of entrepreneurship based around trail oriented business (outfitters, rentals, guides, cabins, hotels, restaurants, etc) the same way the state park industry has to several Missouri communities.

Several established trail networks within the U.S. have seen significant economic success in partnering with land managers and land owners. For example the Hatfield-McCoy Trails project in West Virginia has seen a 45 percent increase in the accommodations industry between 2000 and 2011. While population has declined in the seven counties in which the Hatfield McCoy trails has a physical presence, the region has experienced growth in both labor force and participation income.

Below are several examples successful trail systems that have become economic drivers within respective regions.

<b>OHV/ATV/UV Trail Riders Economic Comparison Profile</b>		
<b>Organization</b>	<b>Location</b>	<b>Data and Facts</b>
<b>Smurfwood Trails</b> Source: <a href="https://www.smurfwoodtrails.com">https://www.smurfwoodtrails.com</a>	Canton, Missouri	<ul style="list-style-type: none"> <li>• 680 acres of various terrain</li> <li>• 20 miles of ATV trails</li> </ul>
<b>St. Joe State Park</b> Source: St. Joe State Park Visitor Use Study	Park Hills, Missouri	<ul style="list-style-type: none"> <li>• 669,861 visitors in 2017</li> <li>• 61% of visitors ride ATV/ORV</li> <li>• Woodland trails are preferred over sand flats (60% to 40% respectively)</li> <li>• 13% of riders attend or participate in ATV/ORV special events</li> <li>• Almost 2,000 acres reserved for ATV/ORV enthusiasts</li> <li>• 790,839 visitors spent a total of \$14.6 million on trips to the park in 2003.</li> </ul>
<b>Finger Lakes State Park</b> Source: <a href="http://mostateparks.com">mostateparks.com</a> _Attendance	Columbia, Missouri	<ul style="list-style-type: none"> <li>• 193,141 visitors in 2017</li> <li>• ATV and off-road motorcycle park</li> </ul>
<b>Hatfield-McCoy Trails</b> Source: Hatfield-McCoy Trails Economic Impact Study	West Virginia	<ul style="list-style-type: none"> <li>• 8 trail systems totalling 700 miles of trails usable for ATVs, UTVs and off-road motorcycles</li> <li>• \$22 million total estimated economic impact</li> </ul>
<b>Montana Trail Vehicle Riders Association</b> Source: <a href="http://mtvra.com">mtvra.com</a>	Great Falls, Montana	<ul style="list-style-type: none"> <li>• Advocate safety and improve Montana's trails open and shared by equestrians, OHV riders, bicycle riders, runners, hikers and more</li> <li>• 15 established state club trail organizations</li> </ul>
<b>Mountain Trail Riders Association</b> Source: <a href="http://mountaintrailriders.org">mountaintrailriders.org</a>	Bluff City, Tennessee	<ul style="list-style-type: none"> <li>• Promote OHV riding with forestry officials, members of local and state government, and the overall community</li> <li>• Membership dues</li> </ul>
<b>Appleton OHV Park</b> Source: University of Minnesota Study	Appleton, Minnesota	<ul style="list-style-type: none"> <li>• 330 acre park</li> <li>• Park users spent an average of \$189 a day per group</li> </ul>



## Economic Impact

### Missouri Division of Tourism 2017 Report

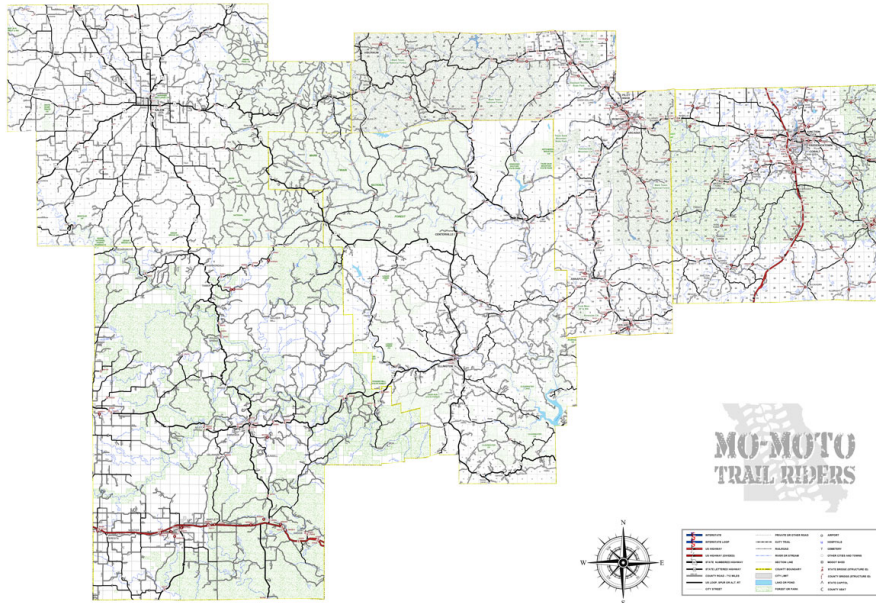
Source: Missouri Division of Tourism Annual Report FY17

County Name	FY17 Total Expenditures in 17 Tourism-Related SIC Codes	FY17 Tourism-Related Employment
Dent County	\$13,949,499	322
Iron County	\$5,772,996	179
Madison County	\$10,194,602	285
Reynolds County	\$4,183,551	150
Shannon County	\$5,956,122	101
<b>Regional Total</b>	<b>\$40,056,770</b>	<b>1,037</b>

OHV recreation is a proven financial stimulus to the tourism market with the average rider spending a minimum of \$100 on a single day trip. We should encourage struggling areas to embrace OHV tourism as we have the opportunity to directly impact and benefit financial success of local businesses. We can connect rural Missouri to OHV trails, which can provide employment thus income while bringing new money to these distressed regions. OHV tourism can diversify the economy of South East Missouri and create a culture of entrepreneurship based around trail oriented business (outfitters, rentals, guides, cabins, hotels, restaurants, etc) the same way the canoe & kayak industry has to several Missouri communities.

The potential for interconnected trail system throughout South East Missouri, creating a Disney World of outdoor recreation in the region is feasible. With the support of private, federal and state entities development of natural resources are retainable. South East Missouri once thrived off mining and timber industries which has left the region with an extensive network of mining, timber, forest and county systems roads that could be reclaimed for OHV travel.

## Regional County Road Map



According to the US Forest Service Department of Agriculture IRIS Series report on Off-highway vehicle recreation in the United States and its regions and states; twenty-one percent, or 3.2 million of the Midwest's 15.4 million residents, participated in OHV recreation . The youngest age group (33 percent) was nearly three times more likely to participate as the oldest (11 percent). Males (27 percent) were much more likely to be users than females (15 percent), as were American Indians (39 percent) among racial and ethnic groups. Hispanics (19 percent) were more likely to participate in the Midwest region than in either of the eastern regions. Except for the lowest income group (14 percent), participation varied relatively little by income class with the upper middle income group making \$75,000 to \$99,999 annually having the highest rate (29 percent). Similar to the eastern regions, people with the most education were least likely to be OHV users (11 percent). Individuals with less than a high school education were most likely to participate (23 percent). Also, non- metropolitan residents (25 percent) participated in the Midwest at a higher rate than metropolitan dwellers (19 percent).

### Percent of population (with 95% confidence interval) participating in off-highway vehicle recreation by region, 1999- 2007

Source: NSRE 1999-2004. Versions 1-16, except 3, 6, 12. NSRE 2005-2007, Versions 2 & 3.

Note: Percent of U.S. population does not sum exactly to 100 because of rounding

Region	Population age 16 & older	Percent of U.S. age 16 & older	Sample Size	Percent participating in OHV recreation	OHV Participants	Percent of Total Participants
<b>Midwest</b>	15,436.7	6.7%	7,282	20.6%	3,208.7	7.5%

Estimated five county regional impacts in year one assume an increase of 3,000 new OHV riders. The impact scenario assumes an increase of 1,500 daily/weekly permits sold at an average of \$25 in the first year. This would result in an annual sales increase of \$37,500. Annual permits estimated at an average of \$60 assumes an annual sales increase of \$90,000.

The impact scenario assumes an additional 3,000 people will spent \$100/person on other activities while riding, including:

- \$25 at gas stations/convenience stores = annual sales increase of \$75,000
- \$75 at restaurants = annual sales increase of \$225,000
- \$75/day for average of 3 days at hotel (only 2,000 new people estimated to stay at hotels) = annual sales increase of \$450,000

Additional assumptions estimate 200 OHV machines will be sold in the region at an average price of \$10,000 each assuming annual sales increase of \$200,000. Assumptions for year two increased by 35 percent and year three assumptions increased by 50 percent.

### Impact Scenario

Source: Emsi Q4 Data Set November 2018

	Change in Earnings	Change in Jobs	Change in Taxes on Production and Imports (TPI)
<b>Year One</b>	\$453,944	21	\$105,863
<b>Year Two</b>	\$82,658	5	\$18,608
<b>Year Three</b>	\$118,771	1	\$26,702

While Missouri is not yet known for its OHV attractions, it should be noted that most Missouri OHV trails are only up to 50 inches wide or less, while most UTVs size 60-62 inches. UTV sales are increasing and surpassing ATV sales 5 to1 according to Specialty Equipment Market Association (SEMA). Since the early '00s, products such as the John Deere Gator, Kawasaki Mule and Polaris Ranger have been used on job sites, moving heavy objects and transporting crew. Once their durability and overall effectiveness became apparent, UTVs began to make their way into consumers' hands—mostly for use on farms and other functional pieces of property. According to Greg Boeder of Power Products Marketing, a website aimed primarily at powersports dealers, the utility-focused side-by-sides served as a foundation for the UTV market to grow.

# Economy Overview

**52,350**

**Population (2017)**

Population **decreased by 1,136** over the last 5 years and is projected to **decrease by 592** over the next 5 years.

**16,815**

**Jobs (2017)**

Jobs **decreased by 21** over the last 5 years but are projected to **grow by 803** over the next 5 years.

**\$37.7K**

**Avg. Earnings Per Job (2017)**

Regional average earnings per job are **\$26.5K below** the national average earnings of \$64.2K per job.

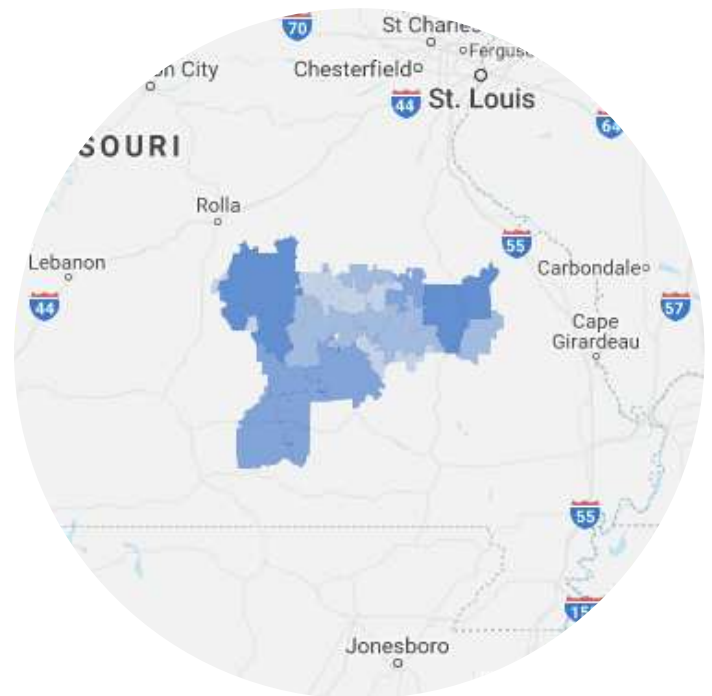
Among the foothills of the Ozark Mountains and nestled between St. Louis and Memphis, north east of Little Rock, Arkansas you'll find fertile prairie land dissected by rivers and streams. Dent, Iron, Madison, Reynolds and Shannon County are known for a variety of outdoor activities centered around the natural attractions scattered throughout the five-county area. Home to two State parks, and two Federal parks, the area has been designated as a part of the beautiful National Scenic Riverways offering camping, fishing, hiking/fitness, nature trails, motor boating, tubing/floating, swimming and water skiing and OHV attractions.

As of 2017 the region's population **declined by 2.1%** since 2012, falling by 1,136. Population is expected to **decrease by 1.1%** between 2017 and 2022, losing 592.

From 2012 to 2017, jobs **declined by 0.1%** in 5 Missouri Counties from 16,836 to **16,815**. This change **fell short of the national growth rate of 8.2% by 8.3%**. As the number of jobs declined, the **labor force participation rate increased from 47.0% to 48.0% between 2012 and 2017**.

Concerning educational attainment, **8.7% of the selected regions' residents possess a Bachelor's Degree** (9.7% below the national average), and **6.3% hold an Associate's Degree** (1.6% below the national average).

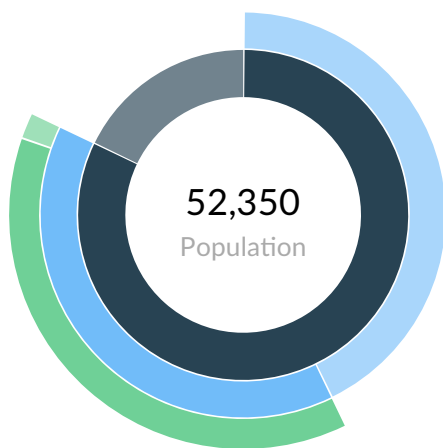
The top three industries in 2017 are Education and Hospitals (Local Government), Individual and Family Services, and Restaurants and Other Eating Places.



	Population (2017)	Labor Force (2017)	Jobs (2017)	Cost of Living	GRP	Imports	Exports
Region	52,350	20,609	16,815	88.8	\$1.51B	\$2.49B	\$2.11B
State	6,112,831	3,020,518	3,116,890	90.7	\$303.88B	\$277.44B	\$330.70B

## Economy Overview - Cont.

### 2017 Labor Force Breakdown



	Population
● Total Working Age Population	42,967
● Not in Labor Force (15+)	22,358
● Labor Force	20,609
● Employed	19,654
● Unemployed	955
● Under 15	9,382

### Educational Attainment

Concerning educational attainment, **8.7% of the selected regions' residents possess a Bachelor's Degree** (9.7% below the national average), and **6.3% hold an Associate's Degree** (1.6% below the national average).

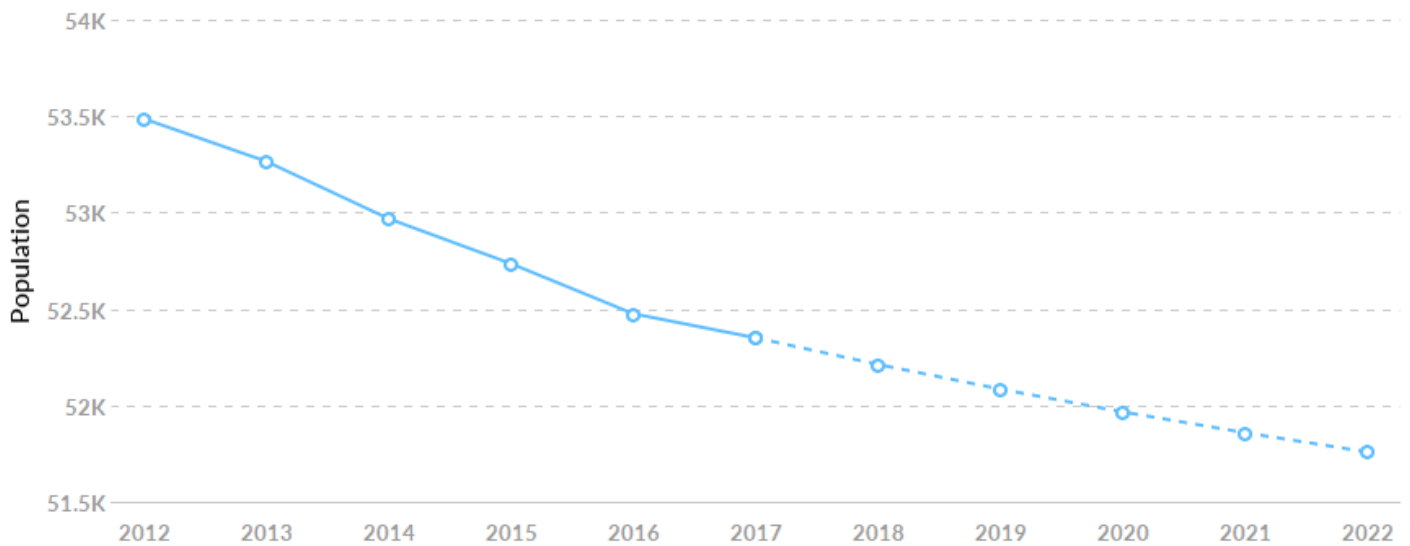


	% of Population	Population
● Less Than 9th Grade	9.0%	3,358
● 9th Grade to 12th Grade	13.0%	4,838
● High School Diploma	38.6%	14,386
● Some College	20.1%	7,498
● Associate's Degree	6.3%	2,340
● Bachelor's Degree	8.7%	3,251
● Graduate Degree and Higher	4.3%	1,609

# Historic & Projected Trends

## Population Trends

As of 2017 the region's population declined by 2.1% since 2012, falling by 1,136. Population is expected to decrease by 1.1% between 2017 and 2022, losing 592.

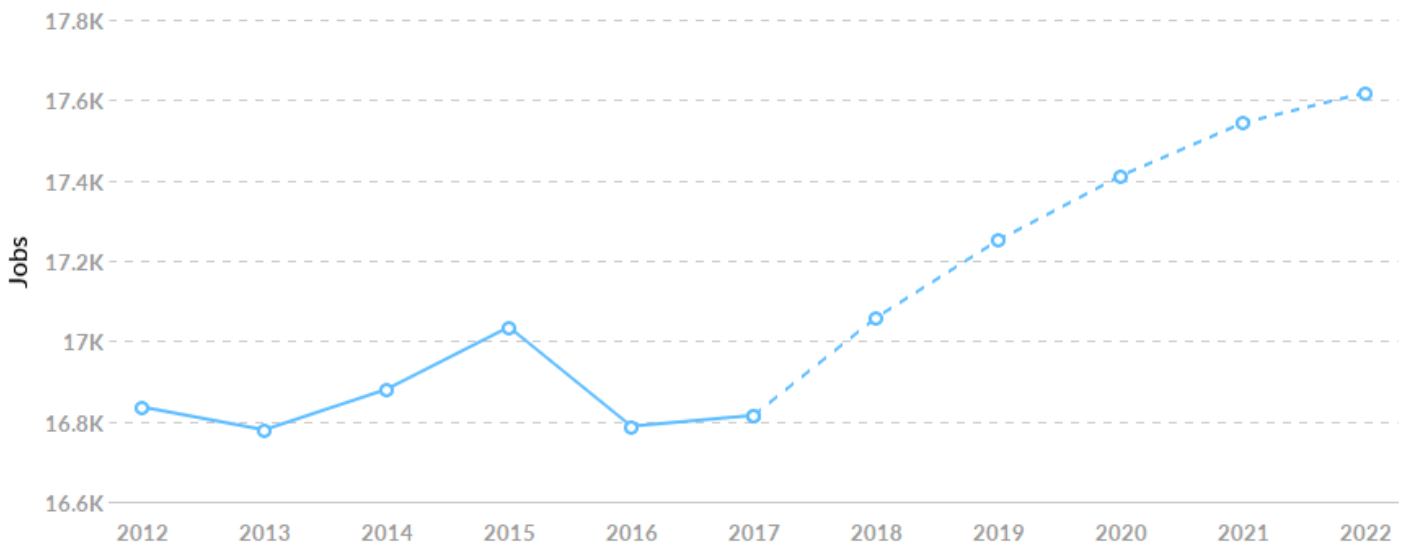


Timeframe	Population
2012	53,486
2013	53,265
2014	52,968
2015	52,735
2016	52,475
2017	52,350
2018	52,212
2019	52,084
2020	51,966
2021	51,858
2022	51,758

# Historic & Projected Trends - Cont.

## Job Trends

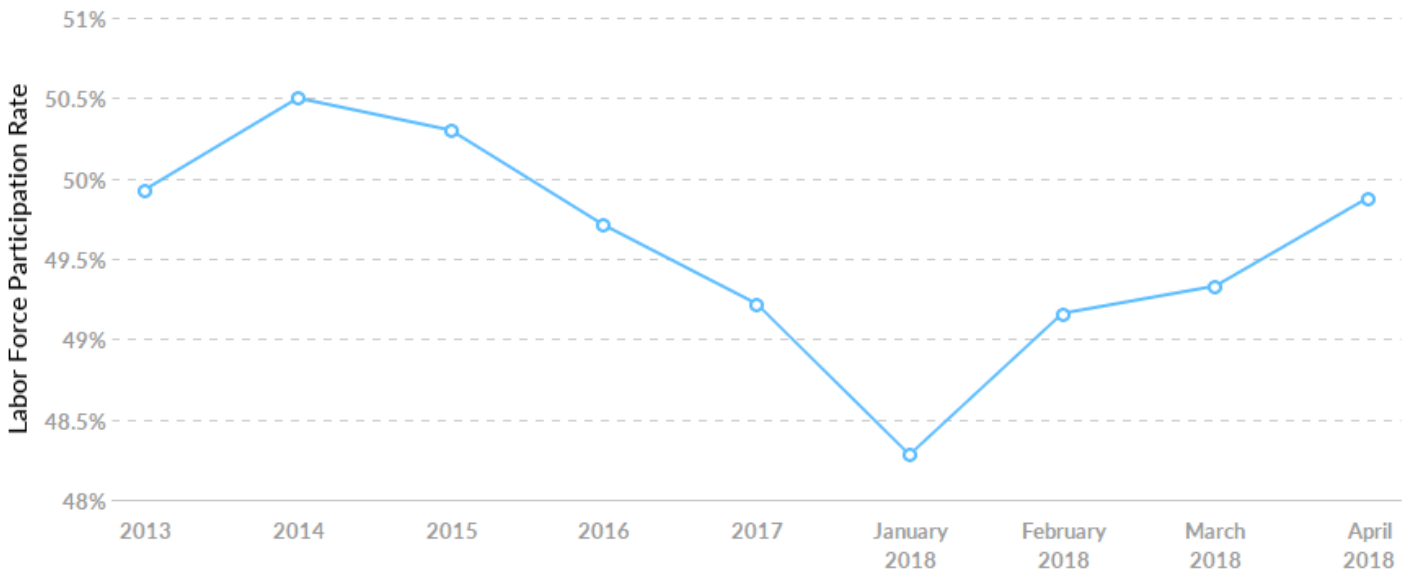
From 2012 to 2017, jobs declined by 0.1% in 5 Missouri Counties from 16,836 to 16,815. This change fell short of the national growth rate of 8.2% by 8.3%.



Timeframe	Jobs
2012	16,836
2013	16,779
2014	16,880
2015	17,035
2016	16,788
2017	16,815
2018	17,058
2019	17,251
2020	17,411
2021	17,543
2022	17,618

# Historic & Projected Trends - Cont.

## Labor Force Participation Rate Trends



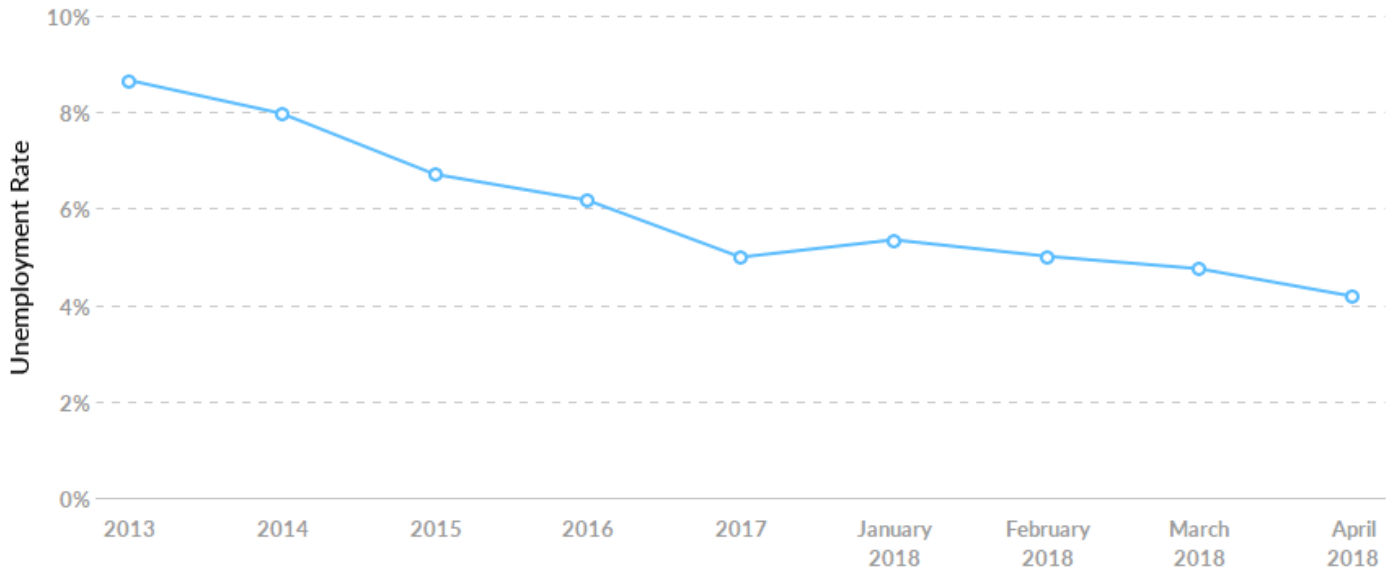
Timeframe	Labor Force Participation Rate
2013	49.93%
2014	50.50%
2015	50.30%
2016	49.71%
2017	49.22%
January 2018	48.28%
February 2018	49.16%
March 2018	49.33%
April 2018	49.88%



# Historic & Projected Trends - Cont.

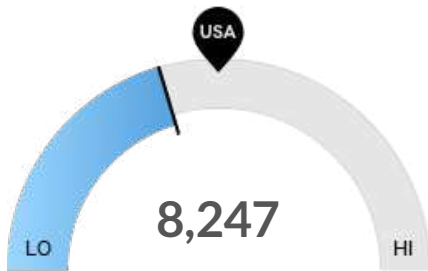
## Unemployment Rate Trends

Your areas had an April 2018 unemployment rate of 4.18%, **decreasing from 8.66%** 5 years before.



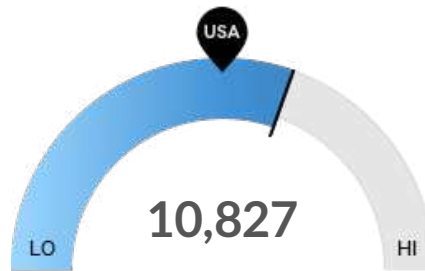
Timeframe	Unemployment Rate
2013	8.66%
2014	7.97%
2015	6.71%
2016	6.17%
2017	4.99%
January 2018	5.35%
February 2018	5.01%
March 2018	4.75%
April 2018	4.18%

## Population Characteristics



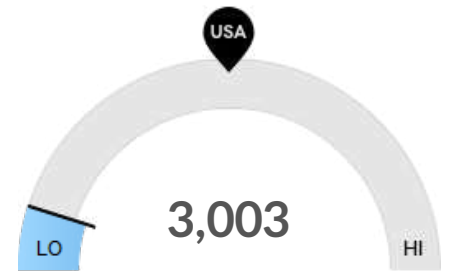
**Millennials**

Your area has 8,247 millennials (ages 20-34). The national average for an area this size is 10,890.



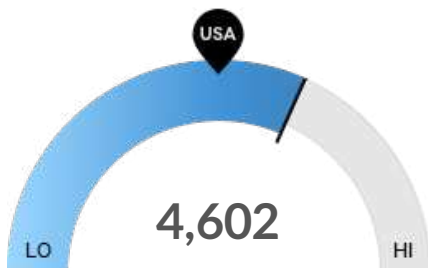
**Retiring Soon**

Retirement risk is high in your area. The national average for an area this size is 7,997 people 65 or older, while there are 10,827 here.



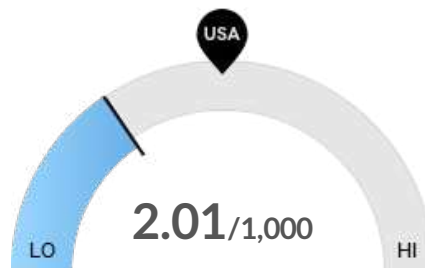
**Racial Diversity**

Racial diversity is low in your area. The national average for an area this size is 20,325 racially diverse people, while there are 3,003 here.



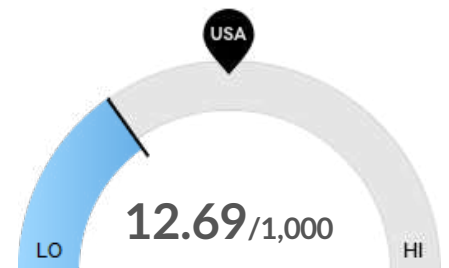
**Veterans**

Your area has 4,602 veterans. The national average for an area this size is 3,172.



**Violent Crime**

Your area has 2.01 violent crimes per 1,000 people. The national rate is 3.75 per 1,000 people.



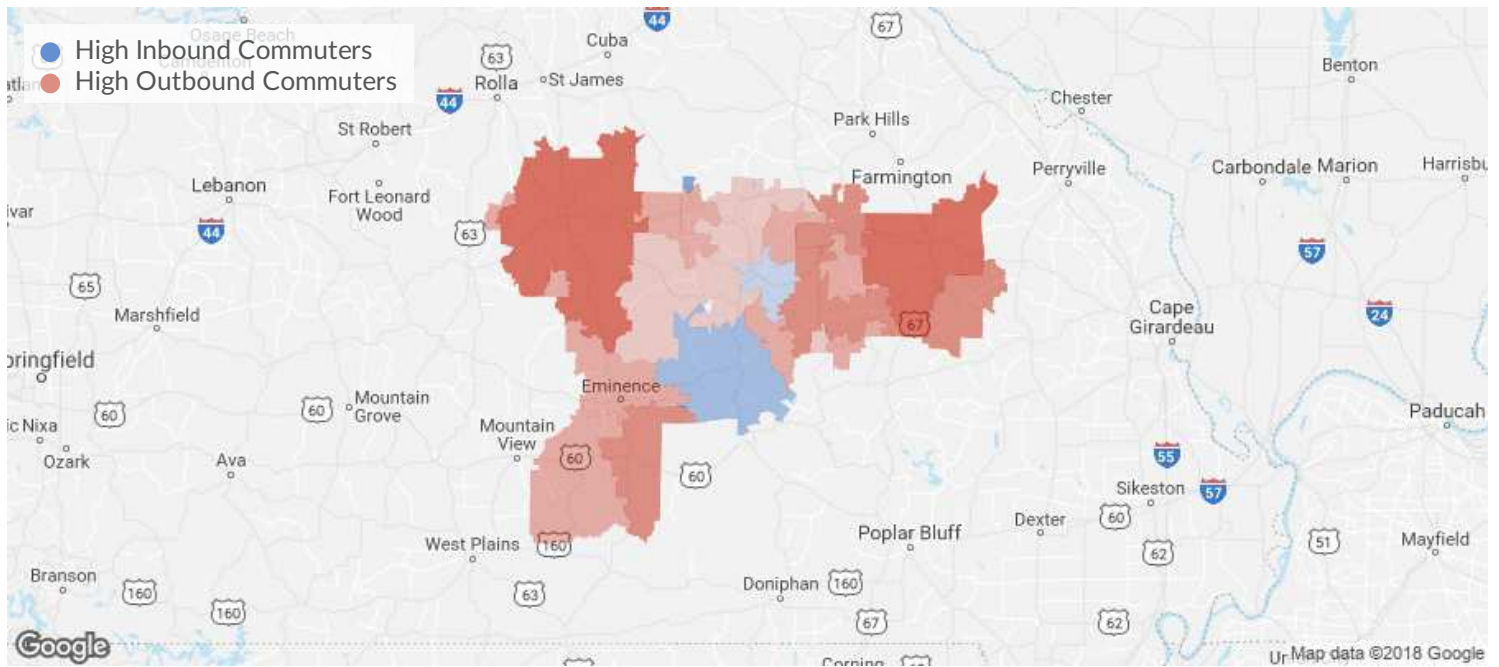
**Property Crime**

Your area has 12.69 property crimes per 1,000 people. The national rate is 24.22 per 1,000 people.

# Population Characteristics - Cont.

## Place of Work vs Place of Residence

Understanding where talent in the region currently works compared to where talent lives can help you optimize site decisions.



### Where Talent Works

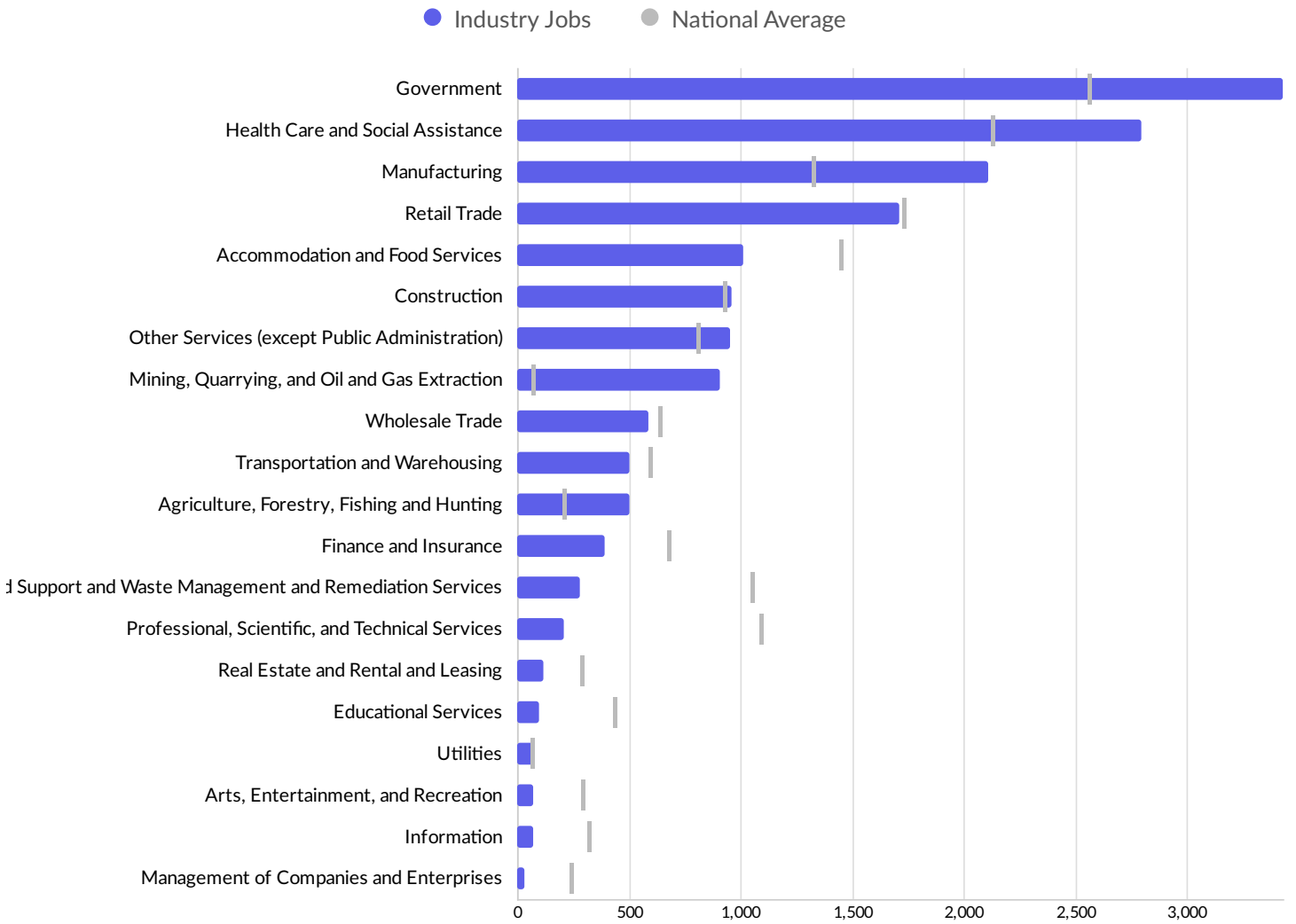
ZIP	Name	2017 Employment
65560	Salem, MO (in Dent co...	4,242
63645	Fredericktown, MO (in...	4,179
63650	Ironton, MO (in Iron co...	1,536
63638	Ellington, MO (in Reyn...	1,148
65566	Viburnum, MO (in Iron...	834

### Where Talent Lives

ZIP	Name	2017 Workers
65560	Salem, MO (in Dent co...	5,309
63645	Fredericktown, MO (in...	5,170
63650	Ironton, MO (in Iron co...	2,031
63638	Ellington, MO (in Reyn...	978
65588	Winona, MO (in Shann...	932

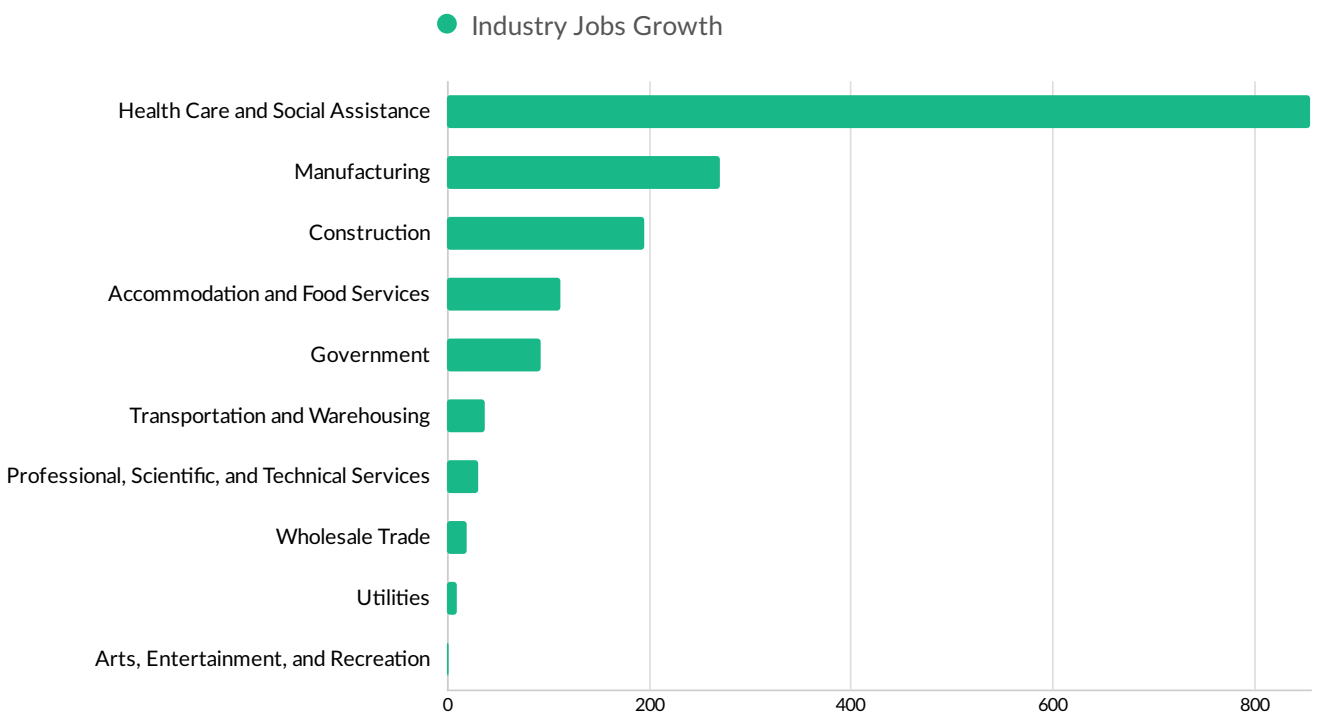
# Industry Characteristics

## Largest Industries



# Industry Characteristics - Cont.

## Top Growing Industries

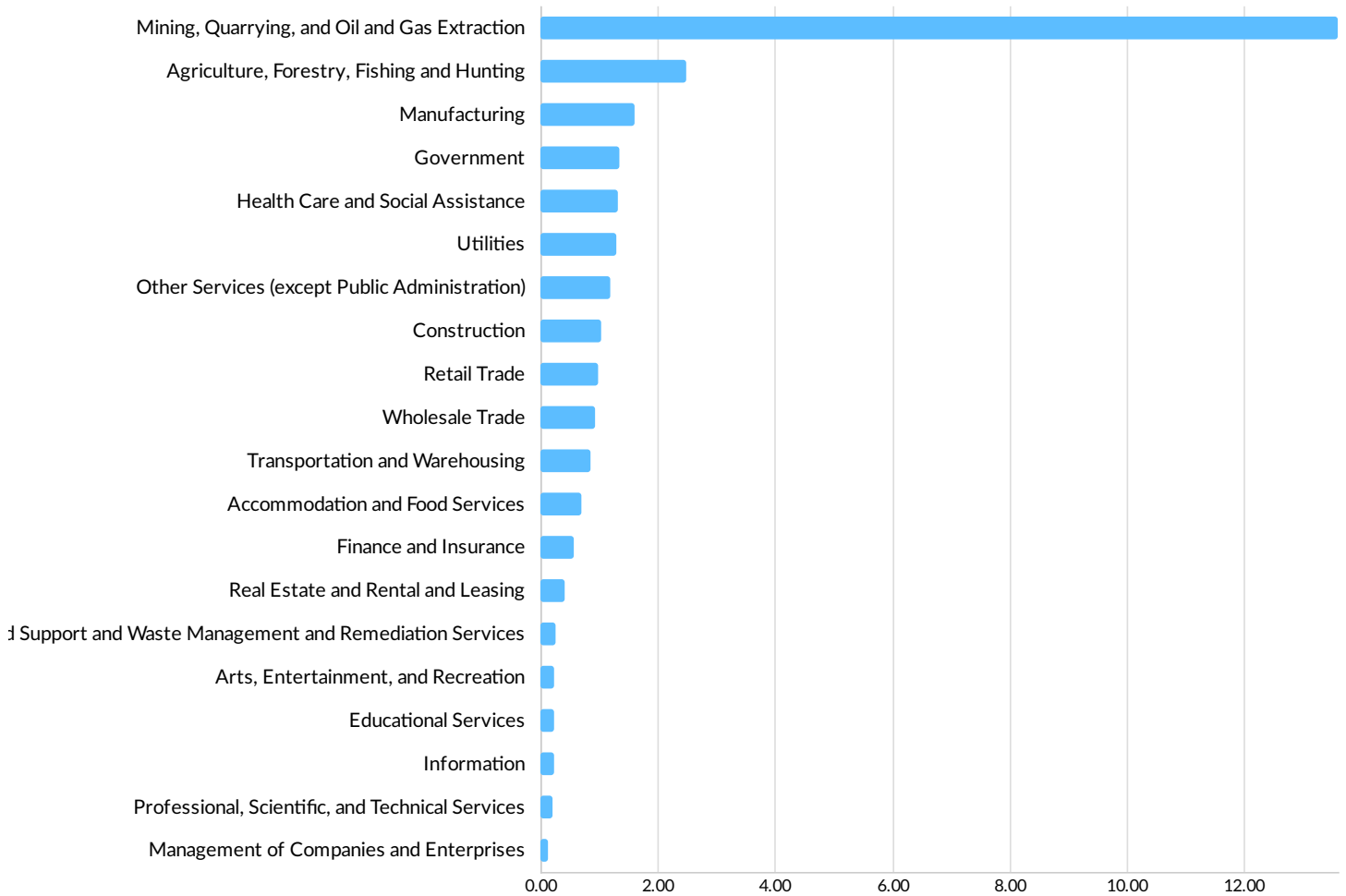


# Industry Characteristics - Cont.

## Top Industry LQ

Location quotient (LQ) is a valuable way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region “unique” in comparison to the national average. Location quotient tells a much different story than merely job numbers or job growth. Industries with high LQ are typically (but not always) export-oriented industries, which are important because they bring money into the region, rather than simply circulating money that is already in the region (as most retail stores and restaurants do). Industries which have both high LQ and relatively high total job numbers typically form a region’s economic base. Economic developers and government officials need to pay particular attention to these industries not only for the jobs they provide, but also for their multiplier effect—the jobs they create in other dependent industries like retail trade and food services.

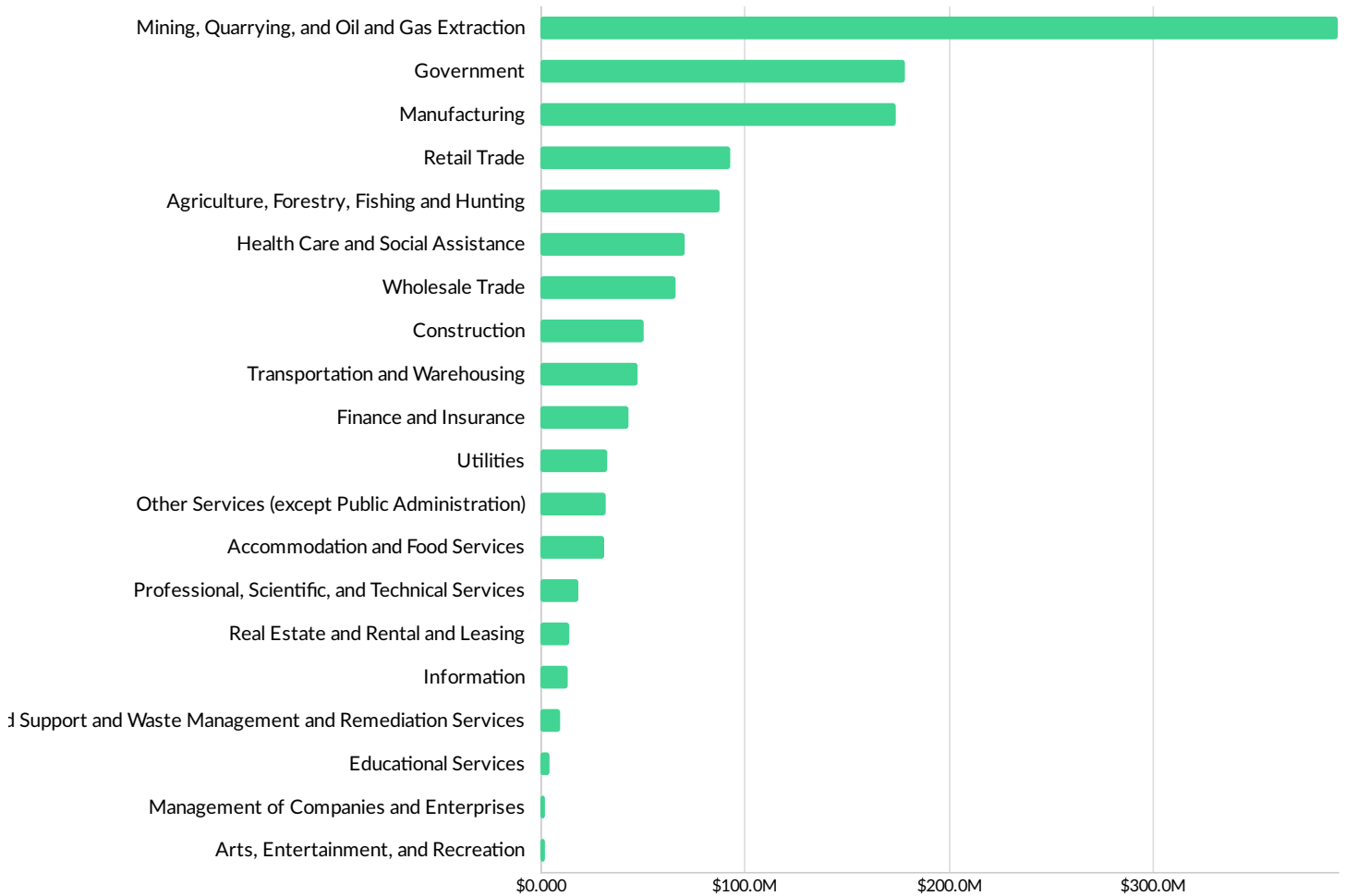
● Industry LQ



# Industry Characteristics - Cont.

## Top Industry GRP

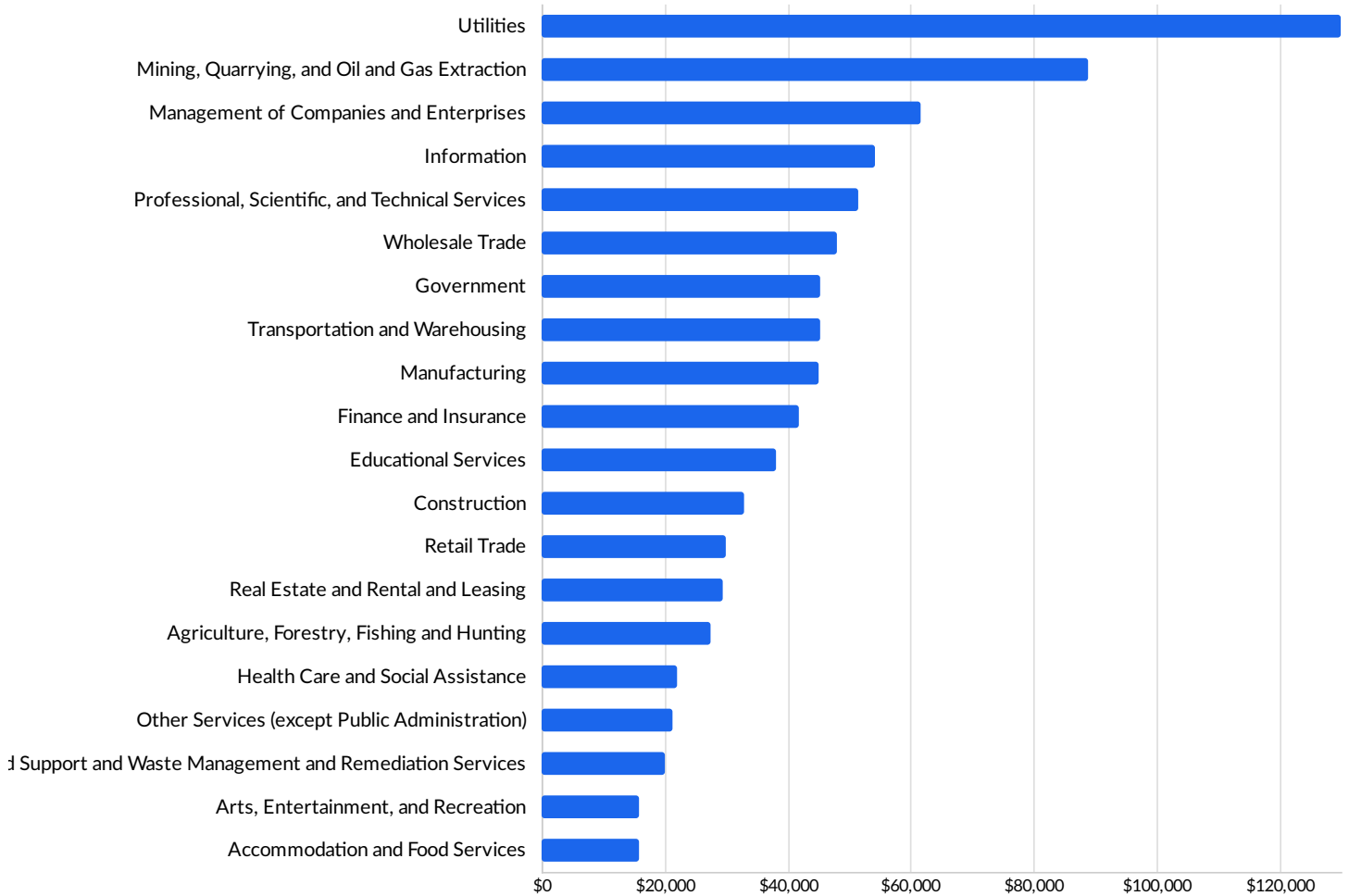
● 2017 Gross Regional Product



# Industry Characteristics - Cont.

## Top Industry Earnings

● 2017 Earnings Per Worker
























## Industry Characteristics - Cont.

Industry	2012 Jobs	2017 Jobs	Change in Jobs	% Change in Jobs	2017 LQ	2017 Earnings Per Worker	2017 GRP
Government	3,335	3,428	93	+3%	1.34	\$45,420	\$178.78M
Health Care and Social Assistance	1,941	2,797	856	+44%	1.32	\$22,053	\$70.75M
Manufacturing	1,836	2,106	270	+15%	1.59	\$45,130	\$173.79M
Retail Trade	1,800	1,712	-88	-5%	0.99	\$29,974	\$92.89M
Accommodation and Food Services	897	1,010	113	+13%	0.70	\$15,781	\$31.16M
Construction	762	958	196	+26%	1.04	\$32,979	\$50.88M
Other Services (except Public Administration)	2,059	954	-1,105	-54%	1.19	\$21,350	\$32.25M
Mining, Quarrying, and Oil and Gas Extraction	1,123	906	-217	-19%	13.60	\$88,924	\$390.75M
Wholesale Trade	569	588	19	+3%	0.93	\$48,098	\$66.19M
Transportation and Warehousing	466	504	38	+8%	0.86	\$45,349	\$47.44M
Agriculture, Forestry, Fishing and Hunting	576	504	-72	-13%	2.49	\$27,534	\$87.87M
Finance and Insurance	429	389	-40	-9%	0.58	\$41,809	\$43.45M
Administrative and Support and Waste Management and Remediation Services	355	280	-75	-21%	0.27	\$19,964	\$9.80M
Professional, Scientific, and Technical Services	180	211	31	+17%	0.19	\$51,405	\$18.95M
Real Estate and Rental and Leasing	123	119	-4	-3%	0.42	\$29,388	\$14.27M
Educational Services	119	100	-19	-16%	0.23	\$38,022	\$4.44M
Utilities	66	76	10	+15%	1.30	\$129,975	\$32.64M
Arts, Entertainment, and Recreation	68	70	2	+3%	0.24	\$15,941	\$2.28M
Information	73	70	-3	-4%	0.23	\$54,256	\$13.16M
Management of Companies and Enterprises	58	33	-25	-43%	0.14	\$61,566	\$2.38M

# Business Characteristics

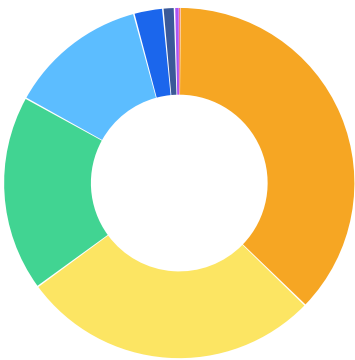
## 3,626 Companies Employ Your Workers

Online profiles for your workers mention 3,626 companies as employers, with the top 10 appearing below. In the last 12 months, 489 companies in your area posted job postings, with the top 10 appearing below.

Top Companies	Profiles	Top Companies Posting	Unique Postings
DOE Run	70 	CRST International, Inc.	1,198 
Wal-Mart Stores, Inc.	26 	USA Truck, Inc.	495 
Salem Memorial District Hospi...	18 	Platinum Supplemental Insuran...	312 
Madison Medical Center	17 	Barr-Nunn Transportation, Inc.	254 
Mineral Area College	16 	Koch Trucking, Inc.	254 
Wells Fargo & Company	15 	Hogan Transports Inc	191 
United States Department of t...	14 	DOE Run	182 
The Boeing Company	13 	Heartland Express, Inc.	164 
Pense Brothers Drilling Compa...	12 	Nussbaum Transportation Serv...	162 
U.S. Bancorp	12 	C.R. England, Inc.	152 

## Business Characteristics - Cont.

### Business Size

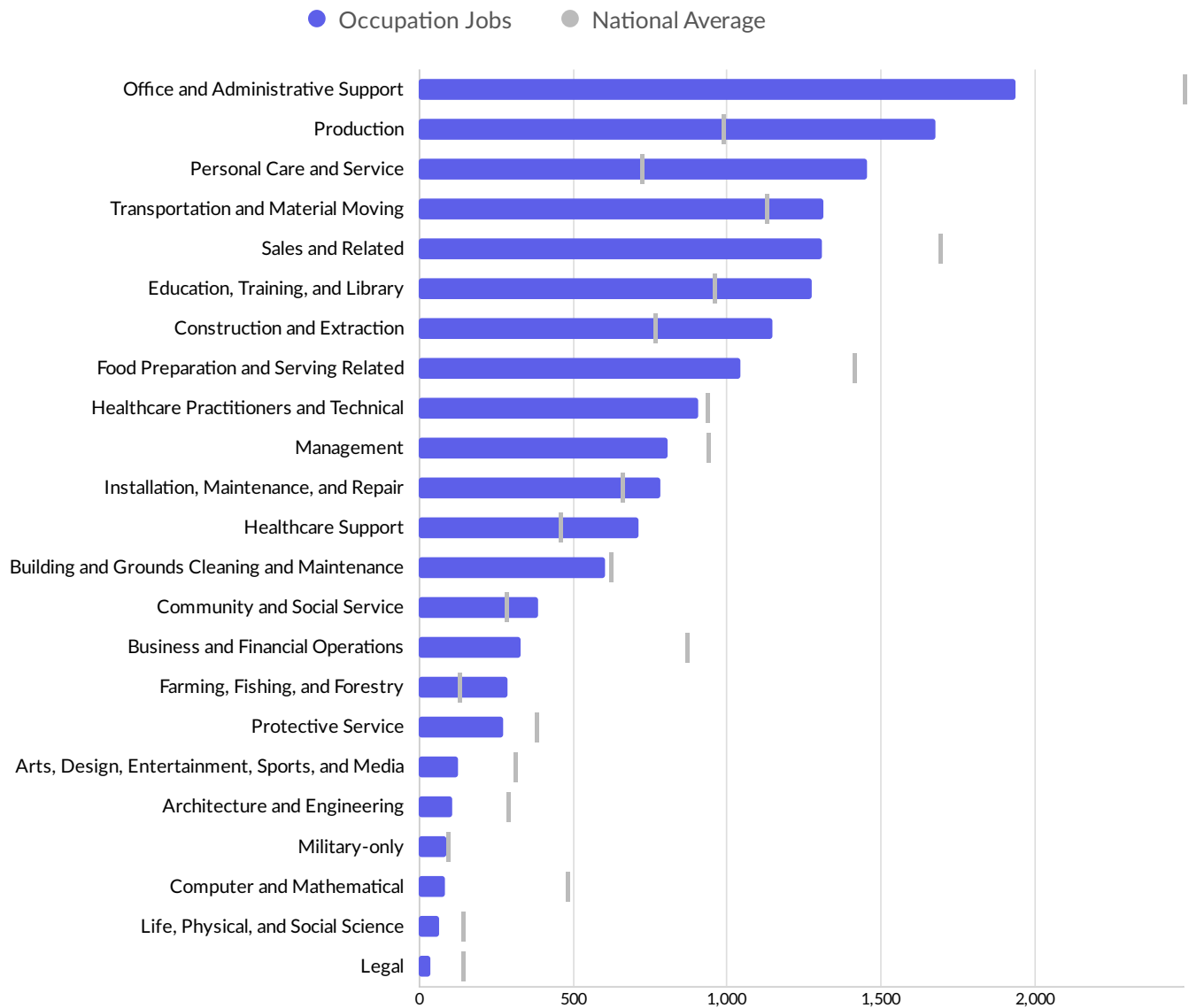


	Percentage	Business Count
● 1 to 4 employees	37.2%	736
● 5 to 9 employees	27.7%	548
● 10 to 19 employees	18.1%	358
● 20 to 49 employees	12.8%	253
● 50 to 99 employees	2.7%	53
● 100 to 249 employees	1.1%	21
● 250 to 499 employees	0.5%	9
● 500+ employees	0.1%	1

*\*Business Data by DatabaseUSA.com is third-party data provided by Emsi to its customers as a convenience, and Emsi does not endorse or warrant its accuracy or consistency with other published Emsi data. In most cases, the Business Count will not match total companies with profiles on the summary tab.*

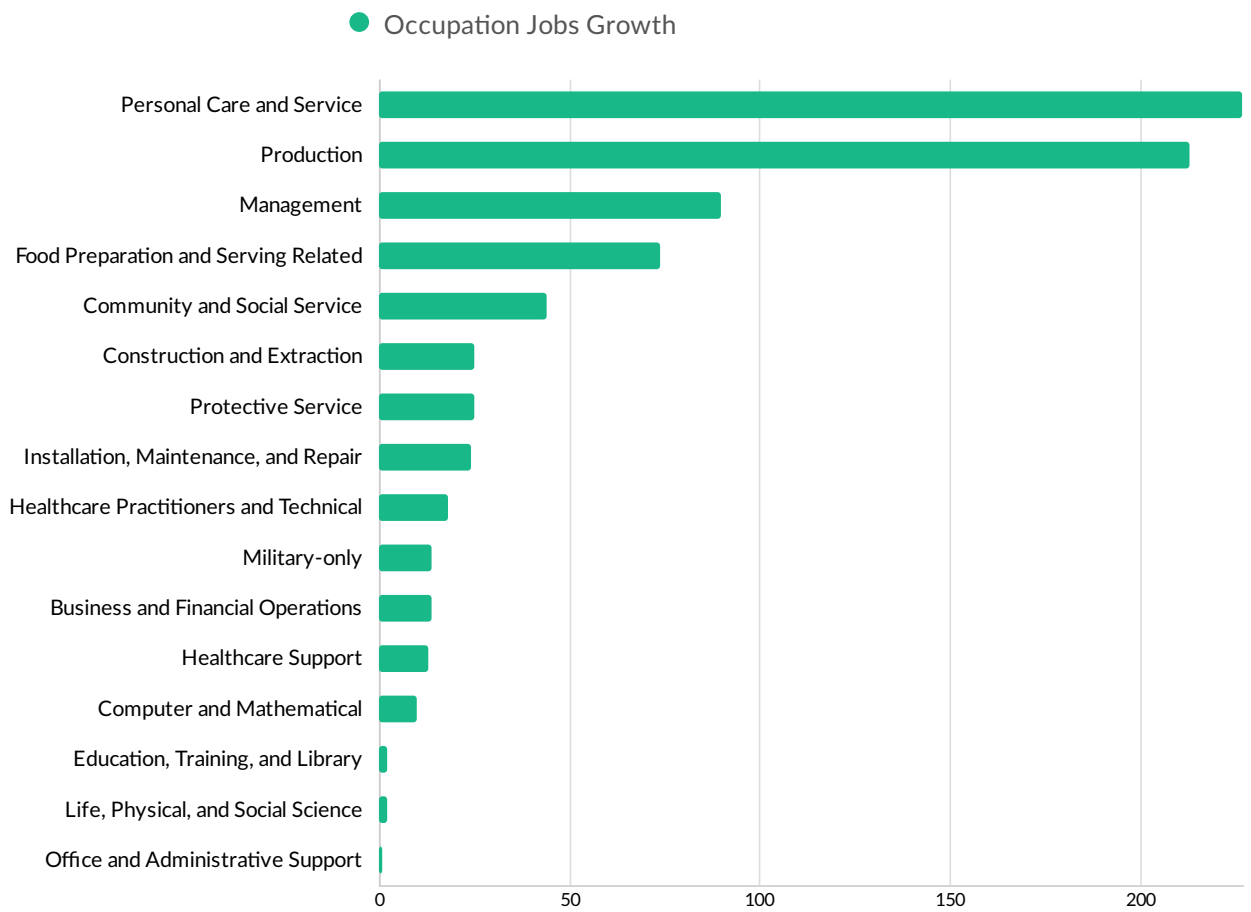
# Workforce Characteristics

## Largest Occupations



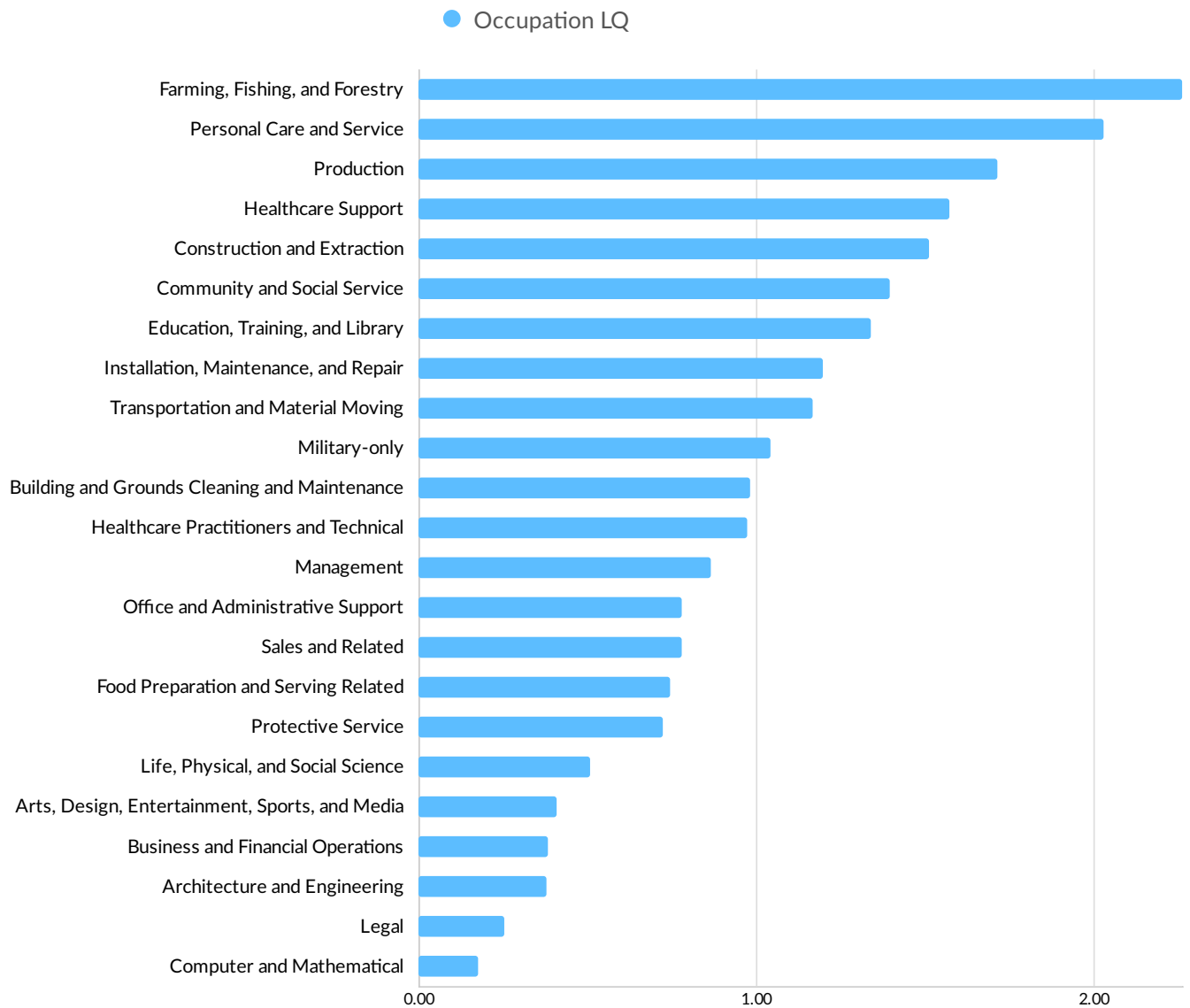
# Workforce Characteristics - Cont.

## Top Growing Occupations



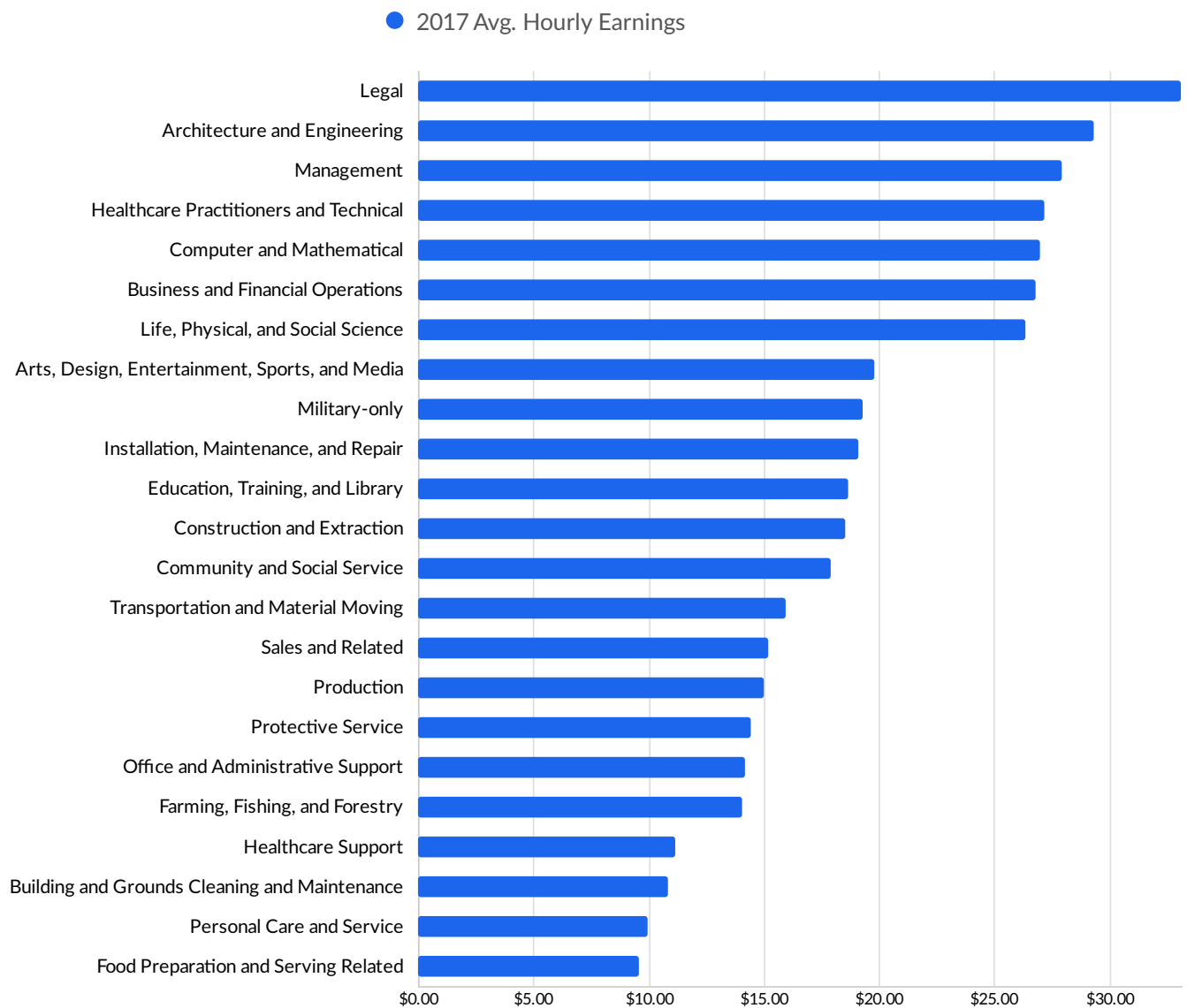
# Workforce Characteristics - Cont.

## Top Occupation LQ



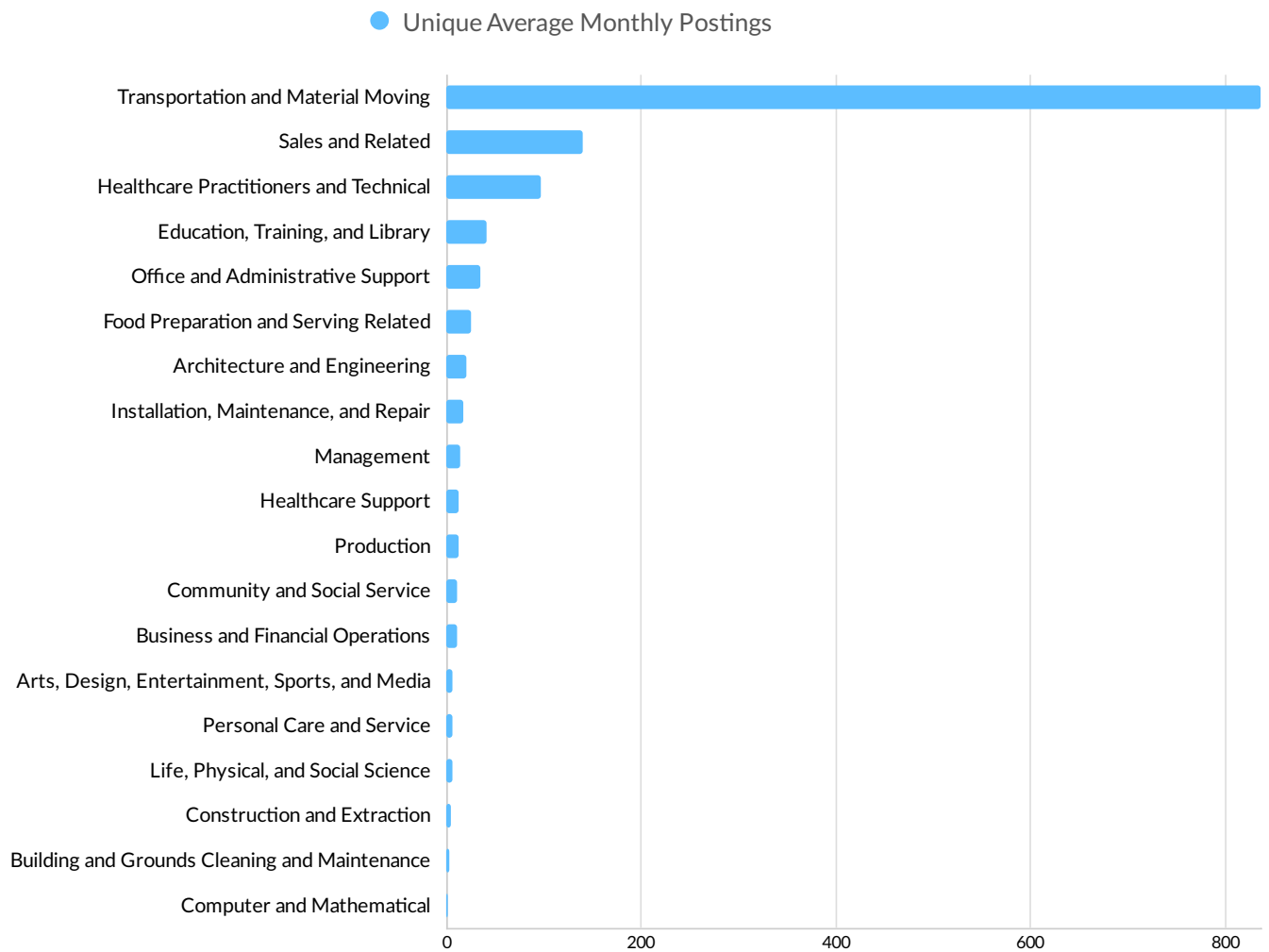
# Workforce Characteristics - Cont.

## Top Occupation Earnings



# Workforce Characteristics - Cont.

## Top Posted Occupations





## Workforce Characteristics - Cont.

Occupation	2012 Jobs	2017 Jobs	Change in Jobs	% Change in Jobs	2017 LQ	2017 Avg. Hourly Earnings	Sep 2017 - Aug 2018 Unique Average Monthly Postings
Office and Administrative Support	1,940	1,941	1	+0%	0.78	\$14.17	36
Production	1,469	1,682	213	+14%	1.71	\$15.03	13
Personal Care and Service	1,233	1,460	227	+18%	2.03	\$9.96	6
Transportation and Material Moving	1,355	1,315	-40	-3%	1.17	\$15.94	837
Sales and Related	1,347	1,313	-34	-3%	0.78	\$15.20	141
Education, Training, and Library	1,277	1,279	2	+0%	1.34	\$18.64	42
Construction and Extraction	1,125	1,150	25	+2%	1.51	\$18.56	5
Food Preparation and Serving Related	973	1,047	74	+8%	0.74	\$9.57	25
Healthcare Practitioners and Technical	890	908	18	+2%	0.97	\$27.15	97
Management	721	811	90	+12%	0.87	\$27.94	15
Installation, Maintenance, and Repair	764	788	24	+3%	1.20	\$19.09	17
Healthcare Support	704	717	13	+2%	1.57	\$11.15	14
Building and Grounds Cleaning and Maintenance	1,201	607	-594	-49%	0.98	\$10.87	4
Community and Social Service	343	387	44	+13%	1.39	\$17.88	12
Business and Financial Operations	319	333	14	+4%	0.38	\$26.78	12
Farming, Fishing, and Forestry	415	290	-125	-30%	2.26	\$14.05	0
Protective Service	250	275	25	+10%	0.72	\$14.45	1

## Workforce Characteristics - Cont.

Occupation	2012 Jobs	2017 Jobs	Change in Jobs	% Change in Jobs	2017 LQ	2017 Avg. Hourly Earnings	Sep 2017 - Aug 2018 Unique Average Monthly Postings
Arts, Design, Entertainment, Sports, and Media	137	126	-11	-8%	0.41	\$19.79	6
Architecture and Engineering	117	107	-10	-9%	0.38	\$29.34	20
Military-only	78	92	14	+18%	1.04	\$19.28	0
Computer and Mathematical	75	85	10	+13%	0.18	\$27.01	2
Life, Physical, and Social Science	66	68	2	+3%	0.51	\$26.38	6
Legal	37	36	-1	-3%	0.26	\$33.11	0

## Sources

American Motorcyclist Association  
[www.americanmotorcyclist.com](http://www.americanmotorcyclist.com)

National Off-Highway Vehicle Conservation Council  
[www.nohvcc.org](http://www.nohvcc.org)

Economic Modeling Specialists, Inc.,  
<http://www.economicmodeling.com>

Missouri's Division of Tourism  
[www.visitmo.com](http://www.visitmo.com) Annual Report FY17

Missouri State Parks  
<https://mostateparks.com/page55072/facts-and-figures>

U.S. Department of Commerce's Bureau of Economic Analysis  
<https://www.bea.gov/data/special-topics/outdoor-recreation>

## Appendix A - Economic Impact

### Input-Output Data

The input-output model in this report is EMSI's gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several EMSI in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

## Year One Aggregate Changes

### Changes to Motorcycle, ATV, and All Other Motor Vehicle Dealers

<b>\$103,270</b> Change in Earnings 1.16 Multiplier	<b>3</b> Change in Jobs 1.22 Multiplier	<b>\$29,242</b> Change in Taxes on Production and Imports (TPI)
---	---	--

### Changes to Gasoline Stations with Convenience Stores

---

**\$32,786**

**Change in Earnings**

1.17 Multiplier

**2**

**Change in Jobs**

1.13 Multiplier

**\$7,767**

**Change in Taxes on Production and Imports (TPI)**

---

**Changes to All Other Amusement and Recreation Industries**

---

**\$60,335**

**Change in Earnings**

1.17 Multiplier

**3**

**Change in Jobs**

1.15 Multiplier

**\$7,211**

**Change in Taxes on Production and Imports (TPI)**

---

**Changes to Hotels (except Casino Hotels) and Motels**

---

**\$183,009**

**Change in Earnings**

1.19 Multiplier

**9**

**Change in Jobs**

1.16 Multiplier

**\$46,396**

**Change in Taxes on Production and Imports (TPI)**

---

**Changes to Limited-Service Restaurants**

**\$74,545**

**Change in Earnings**

1.23 Multiplier

**5**

**Change in Jobs**

1.14 Multiplier

**\$15,247**

**Change in Taxes on Production and Imports (TPI)**

## Year Two Aggregate Changes

**\$536,602**

**Change in Earnings**

1.19 Multiplier

**26**

**Change in Jobs**

1.16 Multiplier

**\$124,471**

**Change in Taxes on Production and Imports (TPI)**

## Changes to Motorcycle, ATV, and All Other Motor Vehicle Dealers

**\$103,270**

**Change in Earnings**

1.16 Multiplier

**3**

**Change in Jobs**

1.22 Multiplier

**\$29,242**

**Change in Taxes on Production and Imports (TPI)**

### Changes to Gasoline Stations with Convenience Stores

<b>\$40,162</b> Change in Earnings 1.17 Multiplier	<b>2</b> Change in Jobs 1.13 Multiplier	<b>\$9,514</b> Change in Taxes on Production and Imports (TPI)
--	---	---

### Changes to All Other Amusement and Recreation Industries

<b>\$70,804</b> Change in Earnings 1.17 Multiplier	<b>4</b> Change in Jobs 1.15 Multiplier	<b>\$8,463</b> Change in Taxes on Production and Imports (TPI)
--	---	---

### Changes to Hotels (except Casino Hotels) and Motels

<b>\$231,049</b> Change in Earnings 1.19 Multiplier	<b>11</b> Change in Jobs 1.16 Multiplier	<b>\$58,575</b> Change in Taxes on Production and Imports (TPI)
---	--	--

### Changes to Limited-Service Restaurants

<p><b>\$91,317</b></p> <p><b>Change in Earnings</b></p> <p>1.23 Multiplier</p>	<p><b>6</b></p> <p><b>Change in Jobs</b></p> <p>1.14 Multiplier</p>	<p><b>\$18,677</b></p> <p><b>Change in Taxes on Production and Imports (TPI)</b></p>
--	---	--

### Year Three Aggregate Changes

<p><b>\$572,715</b></p> <p><b>Change in Earnings</b></p> <p>1.19 Multiplier</p>	<p><b>27</b></p> <p><b>Change in Jobs</b></p> <p>1.16 Multiplier</p>	<p><b>\$132,565</b></p> <p><b>Change in Taxes on Production and Imports (TPI)</b></p>
---	--	---

### Changes to Motorcycle, ATV, and All Other Motor Vehicle Dealers

<p><b>\$103,270</b></p> <p><b>Change in Earnings</b></p> <p>1.16 Multiplier</p>	<p><b>3</b></p> <p><b>Change in Jobs</b></p> <p>1.22 Multiplier</p>	<p><b>\$29,242</b></p> <p><b>Change in Taxes on Production and Imports (TPI)</b></p>
---	---	--

### Changes to Gasoline Stations with Convenience Stores



---

**\$43,441**

**Change in Earnings**

1.17 Multiplier

**2**

**Change in Jobs**

1.13 Multiplier

**\$10,291**

**Change in Taxes on Production and Imports (TPI)**

---

**Changes to All Other Amusement and Recreation Industries**

---

**\$75,596**

**Change in Earnings**

1.17 Multiplier

**4**

**Change in Jobs**

1.15 Multiplier

**\$9,035**

**Change in Taxes on Production and Imports (TPI)**

---

**Changes to Hotels (except Casino Hotels) and Motels**

---

**\$251,637**

**Change in Earnings**

1.19 Multiplier

**12**

**Change in Jobs**

1.16 Multiplier

**\$63,794**

**Change in Taxes on Production and Imports (TPI)**

---

**Changes to Limited-Service Restaurants**

---

**\$98,772**

**Change in Earnings**

1.23 Multiplier

**6**

**Change in Jobs**

1.14 Multiplier

**\$20,202**

**Change in Taxes on Production and Imports (TPI)**

---

# Appendix B - Sports and Leisure Market Potential



## Sports and Leisure Market Potential

5 Counties 3  
 Dent County, MO (29065) et al.  
 Geography: County

Prepared by ESRI and MIC

Demographic Summary		2018	2023
Population		55,169	55,514
Population 18+		43,404	43,563
Households		22,362	22,462
Median Household Income		\$37,938	\$40,267
Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Participated in aerobics in last 12 months	2,180	5.0%	64
Participated in archery in last 12 months	1,555	3.6%	134
Participated in backpacking in last 12 months	807	1.9%	52
Participated in baseball in last 12 months	2,001	4.6%	111
Participated in basketball in last 12 months	2,309	5.3%	64
Participated in bicycling (mountain) in last 12 months	883	2.0%	50
Participated in bicycling (road) in last 12 months	2,215	5.1%	50
Participated in boating (power) in last 12 months	2,247	5.2%	101
Participated in bowling in last 12 months	2,365	5.4%	56
Participated in canoeing/kayaking in last 12 months	1,951	4.5%	68
Participated in fishing (fresh water) in last 12 months	7,826	18.0%	157
Participated in fishing (salt water) in last 12 months	1,455	3.4%	88
Participated in football in last 12 months	1,416	3.3%	74
Participated in Frisbee in last 12 months	1,077	2.5%	60
Participated in golf in last 12 months	2,350	5.4%	63
Participated in hiking in last 12 months	2,958	6.8%	56
Participated in horseback riding in last 12 months	1,371	3.2%	140
Participated in hunting with rifle in last 12 months	3,874	8.9%	210
Participated in hunting with shotgun in last 12 months	3,300	7.6%	226
Participated in ice skating in last 12 months	658	1.5%	51
Participated in jogging/running in last 12 months	3,137	7.2%	56
Participated in motorcycling in last 12 months	1,512	3.5%	109
Participated in Pilates in last 12 months	700	1.6%	58
Participated in ping pong in last 12 mos	902	2.1%	55
Participated in rock climbing in last 12 mos	419	1.0%	56
Participated in skiing (downhill) in last 12 months	552	1.3%	43
Participated in soccer in last 12 months	861	2.0%	48
Participated in softball in last 12 months	1,142	2.6%	96
Participated in swimming in last 12 months	4,884	11.3%	69
Participated in target shooting in last 12 months	1,925	4.4%	102
Participated in tennis in last 12 months	783	1.8%	52
Participated in volleyball in last 12 months	1,443	3.3%	101
Participated in walking for exercise in last 12 months	8,482	19.5%	80
Participated in weight lifting in last 12 months	2,568	5.9%	56
Participated in yoga in last 12 months	1,632	3.8%	46
Participated in Zumba in last 12 mos	1,075	2.5%	66
Spent on sports/rec equip in last 12 months: \$1-99	2,594	6.0%	89
Spent on sports/rec equip in last 12 months: \$100-\$249	2,787	6.4%	102
Spent on sports/rec equip in last 12 months: \$250+	3,545	8.2%	104
Attend sports events	5,195	12.0%	71
Attend sports events: baseball game - MLB reg seas	1,107	2.6%	45
Attend sports events: basketball game-NBA reg seas	385	0.9%	54
Attend sports events: football game (college)	1,117	2.6%	74
Attend sports events: football game - NFL weekend	462	1.1%	51
Attend sports events: high school sports	1,221	2.8%	87

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.  
**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.

September 13, 2018

## Sports and Leisure Market Potential

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Prepared by ESRI and MIC

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Listen to sports on radio	3,919	9.0%	78
Watch sports on TV	22,572	52.0%	89
Watch on TV: alpine skiing/ski jumping	965	2.2%	75
Watch on TV: auto racing (NASCAR)	6,327	14.6%	139
Watch on TV: auto racing (not NASCAR)	2,109	4.9%	114
Watch on TV: baseball (MLB regular season)	5,853	13.5%	69
Watch on TV: baseball (MLB playoffs/World Series)	5,058	11.7%	68
Watch on TV: basketball (college)	4,934	11.4%	88
Watch on TV: basketball (NCAA tournament)	5,681	13.1%	101
Watch on TV: basketball (NBA regular season)	5,052	11.6%	76
Watch on TV: basketball (NBA playoffs/finals)	5,311	12.2%	73
Watch on TV: basketball (WNBA)	1,377	3.2%	109
Watch on TV: bicycle racing	624	1.4%	64
Watch on TV: bowling	935	2.2%	103
Watch on TV: boxing	2,199	5.1%	75
Watch on TV: bull riding (pro)	2,296	5.3%	179
Watch on TV: Equestrian events	844	1.9%	87
Watch on TV: extreme sports (summer)	1,095	2.5%	70
Watch on TV: extreme sports (winter)	1,080	2.5%	62
Watch on TV: figure skating	1,841	4.2%	77
Watch on TV: fishing	3,440	7.9%	171
Watch on TV: football (college)	9,610	22.1%	94
Watch on TV: football (NFL Mon/Thurs night games)	12,131	27.9%	87
Watch on TV: football (NFL weekend games)	11,925	27.5%	84
Watch on TV: football (NFL playoffs/Super Bowl)	12,665	29.2%	87
Watch on TV: golf (PGA)	3,879	8.9%	76
Watch on TV: golf (LPGA)	1,446	3.3%	86
Watch on TV: gymnastics	1,630	3.8%	66
Watch on TV: high school sports	2,042	4.7%	96
Watch on TV: horse racing (at track or OTB)	1,021	2.4%	80
Watch on TV: ice hockey (NHL regular season)	1,742	4.0%	46
Watch on TV: ice hockey (NHL playoffs/Stanley Cup)	1,490	3.4%	40
Watch on TV: mixed martial arts (MMA)	1,465	3.4%	85
Watch on TV: motorcycle racing	1,337	3.1%	104
Watch on TV: Olympics (summer)	4,837	11.1%	70
Watch on TV: Olympics (winter)	4,068	9.4%	83
Watch on TV: rodeo	2,550	5.9%	189
Watch on TV: soccer (MLS)	1,212	2.8%	55
Watch on TV: soccer (World Cup)	1,448	3.3%	41
Watch on TV: tennis (men 's)	1,492	3.4%	57
Watch on TV: tennis (women 's)	1,568	3.6%	59
Watch on TV: track & field	1,702	3.9%	99
Watch on TV: volleyball (pro beach)	779	1.8%	66
Watch on TV: wrestling (WWE)	3,080	7.1%	140
Interest in sports: college basketball Super Fan	1,378	3.2%	85
Interest in sports: college football Super Fan	3,948	9.1%	114
Interest in sports: golf Super Fan	773	1.8%	90
Interest in sports: high school sports Super Fan	1,211	2.8%	94
Interest in sports: MLB Super Fan	1,641	3.8%	74
Interest in sports: NASCAR Super Fan	1,388	3.2%	106
Interest in sports: NBA Super Fan	1,541	3.6%	64
Interest in sports: NFL Super Fan	4,582	10.6%	84
Interest in sports: NHL Super Fan	685	1.6%	46
Interest in sports: soccer Super Fan	522	1.2%	41

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.  
**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.

September 13, 2018

## Sports and Leisure Market Potential

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 Geography: County

Prepared by ESRI and MIC

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Member of AARP	4,576	10.5%	89
Member of charitable organization	1,821	4.2%	95
Member of church board	1,649	3.8%	131
Member of fraternal order	725	1.7%	69
Member of religious club	1,428	3.3%	91
Member of union	973	2.2%	59
Member of veterans club	1,264	2.9%	117
Attended adult education course in last 12 months	1,751	4.0%	52
Went to art gallery in last 12 months	1,250	2.9%	36
Attended auto show in last 12 months	1,927	4.4%	75
Did baking in last 12 months	8,295	19.1%	82
Went to bar/night club in last 12 months	4,464	10.3%	59
Went to beach in last 12 months	7,545	17.4%	62
Played billiards/pool in last 12 months	1,964	4.5%	68
Played bingo in last 12 months	1,720	4.0%	98
Did birdwatching in last 12 months	2,107	4.9%	109
Played board game in last 12 months	4,134	9.5%	65
Read book in last 12 months	11,033	25.4%	75
Participated in book club in last 12 months	545	1.3%	43
Went on overnight camping trip in last 12 months	4,245	9.8%	80
Played cards in last 12 months	5,542	12.8%	79
Played chess in last 12 months	982	2.3%	64
Played computer game (offline w/software)/12 months	2,402	5.5%	83
Played computer game (online w/o software)/12 months	4,985	11.5%	95
Cooked for fun in last 12 months	7,683	17.7%	81
Did crossword puzzle in last 12 months	3,233	7.4%	76
Danced/went dancing in last 12 months	1,771	4.1%	54
Attended dance performance in last 12 months	859	2.0%	47
Dined out in last 12 months	18,781	43.3%	85
Participated in fantasy sports league last 12 months	1,086	2.5%	52
Participated in tailgating in last 12 months	1,435	3.3%	71
Did furniture refinishing in last 12 months	1,414	3.3%	88
Gambled at casino in last 12 months	4,518	10.4%	80
Gambled in Las Vegas in last 12 months	428	1.0%	29
Participate in indoor gardening/plant care	4,350	10.0%	109
Attended horse races in last 12 months	468	1.1%	47
Participated in karaoke in last 12 months	1,293	3.0%	75
Bought lottery ticket in last 12 months	14,063	32.4%	90
Played lottery 6+ times in last 30 days	4,342	10.0%	94
Bought lottery ticket in last 12 months: Daily Drawing	1,244	2.9%	86
Bought lottery ticket in last 12 months: Instant Game	8,260	19.0%	108
Bought lottery ticket in last 12 months: Mega Millions	5,411	12.5%	80
Bought lottery ticket in last 12 months: Powerball	8,502	19.6%	89
Attended a movie in last 6 months	18,624	42.9%	72
Attended movie in last 90 days: once/week or more	610	1.4%	60
Attended movie in last 90 days: 2-3 times a month	1,360	3.1%	50
Attended movie in last 90 days: once a month	1,899	4.4%	44
Attended movie in last 90 days: < once a month	12,806	29.5%	82
Movie genre seen at theater/6 months: action	7,003	16.1%	59

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GK/MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.

September 13, 2018

## Sports and Leisure Market Potential

5 Counties 3  
Dent County, MO (29065) et al.  
Geography: County

Prepared by ESRI and MIC

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Movie genre seen at theater/6 months: adventure	8,552	19.7%	63
Movie genre seen at theater/6 months: comedy	7,328	16.9%	69
Movie genre seen at theater/6 months: crime	2,566	5.9%	54
Movie genre seen at theater/6 months: drama	6,163	14.2%	60
Movie genre seen at theater/6 months: family	3,442	7.9%	78
Movie genre seen at theater/6 months: fantasy	3,780	8.7%	63
Movie genre seen at theater/6 months: horror	1,872	4.3%	81
Movie genre seen at theater/6 months: romance	2,097	4.8%	62
Movie genre seen at theater/6 months: science fiction	4,439	10.2%	52
Movie genre seen at theater/6 months: thriller	4,825	11.1%	64
Went to museum in last 12 months	2,295	5.3%	41
Attended classical music/opera performance/12 months	761	1.8%	47
Attended country music performance in last 12 months	2,963	6.8%	104
Attended rock music performance in last 12 months	2,485	5.7%	61
Played musical instrument in last 12 months	2,733	6.3%	84
Did painting/drawing in last 12 months	2,650	6.1%	80
Did photo album/scrapbooking in last 12 months	1,173	2.7%	61
Did photography in last 12 months	3,794	8.7%	84
Did Sudoku puzzle in last 12 months	2,522	5.8%	74
Went to live theater in last 12 months	2,537	5.8%	50
Visited a theme park in last 12 months	4,265	9.8%	52
Visited a theme park 5+ times in last 12 months	1,078	2.5%	62
Participated in trivia games in last 12 months	1,835	4.2%	64
Played video/electronic game (console) last 12 months	3,396	7.8%	86
Played video/electronic game (portable) last 12 months	1,396	3.2%	62
Visited an indoor water park in last 12 months	867	2.0%	61
Did woodworking in last 12 months	2,460	5.7%	125
Participated in word games in last 12 months	4,257	9.8%	95
Went to zoo in last 12 months	3,375	7.8%	61
Purchased DVDs in last 30 days: 1	1,260	2.9%	112
Purchased DVDs in last 30 days: 2	999	2.3%	114
Purchased DVDs in last 30 days: 3+	2,485	5.7%	149
Purchased DVD/Blu-ray disc online in last 12 months	2,093	4.8%	72
Rented DVDs in last 30 days: 1	1,268	2.9%	82
Rented DVDs in last 30 days: 2	1,122	2.6%	70
Rented DVDs in last 30 days: 3+	4,116	9.5%	105
Rented movie/oth video/30 days: action/adventure	7,128	16.4%	77
Rented movie/oth video/30 days: classics	2,586	6.0%	93
Rented movie/oth video/30 days: comedy	7,168	16.5%	79
Rented movie/oth video/30 days: drama	4,279	9.9%	67
Rented movie/oth video/30 days: family/children	4,329	10.0%	99
Rented movie/oth video/30 days: foreign	810	1.9%	74
Rented movie/oth video/30 days: horror	2,859	6.6%	92
Rented movie/oth video/30 days: musical	1,151	2.7%	97
Rented movie/oth video/30 days: news/documentary	1,044	2.4%	58
Rented movie/oth video/30 days: romance	3,128	7.2%	92
Rented movie/oth video/30 days: science fiction	2,454	5.7%	77
Rented movie/oth video/30 days: TV show	2,112	4.9%	62
Rented movie/oth video/30 days: western	1,600	3.7%	136

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September 13, 2018

## Sports and Leisure Market Potential

5 Counties 3  
 Dent County, MO (29065) et al.  
 Geography: County

Prepared by ESRI and MIC

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Rented/purch DVD/Blu-ray/30 days: from amazon.com	1,752	4.0%	54
Rented DVD/Blu-ray/30 days: from netflix.com	3,640	8.4%	62
Rented/purch DVD/Blu-ray/30 days: from Redbox	6,197	14.3%	84
HH owns ATV/UTV	3,244	14.5%	249
Bought any children's toy/game in last 12 months	13,721	31.6%	97
Spent on toys/games for child last 12 months: <\$50	2,538	5.8%	97
Spent on toys/games for child last 12 months: \$50-99	1,397	3.2%	126
Spent on toys/games for child last 12 months: \$100-199	2,802	6.5%	104
Spent on toys/games for child last 12 months: \$200-499	3,946	9.1%	102
Spent on toys/games for child last 12 months: \$500+	1,769	4.1%	87
Bought any toys/games online in last 12 months	2,596	6.0%	64
Bought infant toy in last 12 months	3,236	7.5%	112
Bought pre-school toy in last 12 months	3,314	7.6%	111
Bought for child last 12 months: boy action figure	3,278	7.6%	95
Bought for child last 12 months: girl action figure	1,057	2.4%	71
Bought for child last 12 months: action game	952	2.2%	87
Bought for child last 12 months: bicycle	2,751	6.3%	106
Bought for child last 12 months: board game	4,273	9.8%	89
Bought for child last 12 months: builder set	1,910	4.4%	85
Bought for child last 12 months: car	3,965	9.1%	114
Bought for child last 12 months: construction toy	2,813	6.5%	113
Bought for child last 12 months: fashion doll	2,615	6.0%	139
Bought for child last 12 months: large/baby doll	3,091	7.1%	102
Bought for child last 12 months: doll accessories	2,102	4.8%	126
Bought for child last 12 months: doll clothing	2,296	5.3%	129
Bought for child last 12 months: educational toy	4,734	10.9%	93
Bought for child last 12 months: electronic doll/animal	924	2.1%	77
Bought for child last 12 months: electronic game	2,376	5.5%	99
Bought for child last 12 months: mechanical toy	2,209	5.1%	129
Bought for child last 12 months: model kit/set	1,165	2.7%	92
Bought for child last 12 months: plush doll/animal	3,928	9.0%	111
Bought for child last 12 months: sound game	1,157	2.7%	140
Bought for child last 12 months: water toy	3,369	7.8%	84
Bought for child last 12 months: word game	1,105	2.5%	101

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GKX MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.

September 13, 2018

## Sports and Leisure Market Potential

5 Counties 3  
 Dent County, MO (29065) et al.  
 Geography: County

Prepared by ESRI and MIC

Product/ Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Bought digital book in last 12 months	3,116	7.2%	54
Bought hardcover book in last 12 months	6,560	15.1%	76
Bought paperback book in last 12 months	9,354	21.6%	74
Bought 1-3 books in last 12 months	6,806	15.7%	80
Bought 4-6 books in last 12 months	3,594	8.3%	89
Bought 7+ books in last 12 months	5,240	12.1%	75
Bought book (fiction) in last 12 months	7,858	18.1%	74
Bought book (non-fiction) in last 12 months	6,217	14.3%	64
Bought biography in last 12 months	1,658	3.8%	56
Bought children's book in last 12 months	3,374	7.8%	85
Bought cookbook in last 12 months	2,804	6.5%	89
Bought history book in last 12 months	2,096	4.8%	57
Bought mystery book in last 12 months	3,482	8.0%	79
Bought novel in last 12 months	3,876	8.9%	66
Bought religious book (not bible) in last 12 mo	2,840	6.5%	100
Bought romance book in last 12 months	2,537	5.8%	99
Bought science fiction book in last 12 months	1,822	4.2%	74
Bought personal/business self-help book last 12 months	1,316	3.0%	48
Bought travel book in last 12 months	599	1.4%	66
Bought book online in last 12 months	4,965	11.4%	56
Bought book last 12 months: amazon.com	3,813	8.8%	45
Bought book last 12 months: barnes&noble.com	478	1.1%	50
Bought book last 12 months: Barnes & Noble book store	3,324	7.7%	59
Bought book last 12 months: other book store (not B&N)	4,543	10.5%	104
Bought book last 12 months: mail order	687	1.6%	81
Listened to/purchased audiobook in last 6 months	1,485	3.4%	63

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.

September 13, 2018

## Appendix C – Suggested Trail Rider Questionnaire for future Economic Impact Analysis

### MO-MOTO Trail Rider Users Questionnaire

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MO-MOTO Trail Riders is working to create a positive future for Missouri off-highway vehicle recreation by creating a positive image of off-highway vehicle (OHV) recreation. The goal of this survey and its findings is to bring more money into the region. Please help us in planning this exciting project by answering the questions below. The questionnaire will take 10 minutes to complete. Thank you for participating.

#### Section 1. Please tell us about your OHV recreational interests.

1. How far do you travel to get to trails on average?
  - 0-25 miles
  - 25-50 miles
  - 50-100 miles
  - 100+ miles
  
2. When visiting a trail network how many miles of trails do you prefer?
  - Small 0-10 miles
  - Medium 10-20 miles
  - Long 50+
  - Large open areas
  
3. What type of trail grade do you prefer?
  - Flat and wide with gradual grade changes
  - Tight trails with abrupt grade changes and minimal clearances
  - Tight trails with lots of grade changes and off cambers
  - Trails with diverse skill and riding experiences
  
4. What is most attractive to you when selecting trail networks?
  - Variety of trail options
  - Nearby camping and lodging accommodations
  - Access to local communities
  - Beautiful scenery
  
5. How often do you trail ride?
  - 1-2 times/year
  - 3-4 times/year
  - 5-6 times/year
  - 7-8 times/year
  - 9-10 times/year



11 or more times/year

6. What type of experience do you seek when traveling to a trail network?

- Ability to ride trails without having to load/unload on to trailer
- Beautiful scenery, local history, sight seeing
- Well managed trail oriented facilities and accommodations
- Other types of recreational engagement (i.e. canoe, kayak, hunting)

7. Will you be staying overnight due to travels for trail riding?

Yes       No

If yes, please provide the name/location where you plan to stay:

\_\_\_\_\_

8. How long do you typically plan your trips for when riding trails?

- Single day
- 1-2 days
- 3-4 days
- 5 + days

9. During this visit, what is the total amount you and your group expect to spend on the following? (Enter whole dollar amounts for all that apply.)

Restaurant dining	\$ _____	Transportation costs (car rental, repairs, parking fees etc.)	\$ _____
Camping nearby	\$ _____	Souvenirs	\$ _____
Nearby lodging	\$ _____	Shopping (other than groceries & souvenirs)	\$ _____
Groceries	\$ _____	Riding fees	\$ _____
Equipment/supplies	\$ _____	Other recreational fees (Picnic shelter fees, fishing licenses, admission fees, etc.)	\$ _____
Gas & oil (car, ATV/ORV, etc.)	\$ _____	Other expenses not listed (Please specify.)	\$ _____

How many people do these expenses cover? Adults: \_\_\_\_\_ Children: (<18): \_\_\_\_\_

10. Do you participate in other activities during the day(s) you trail ride? If yes, which of the following best describes those activities?

- Hunting
- Cave visits
- Canoeing/kayaking
- Camping
- Nature trails
- Biking
- Local wineries
- Local restaurants
- History site seeing

11. How is your experience with purchasing resources needed when trail riding in southeast Missouri? Please circle the best answer.

- Very difficult
- Somewhat difficult
- Fairly easy
- Very easy
- Not applicable

12. How do you find out about OHV public use riding trails? (Check all that apply.)

- Website
- Social Media
- Brochure/Flyer
- Friends
- Family
- Other OHV Group

13. Do you have access to the tools and supplies needed to for riding etiquette, safety and ethics?

- Yes
- No
- Some things, but not all

14. What best describes your current OHV riding?

- I own/operate one or more OHV
  - I wish I could ride more but don't know where to ride
  - I prefer to ride on designated, formally mapped trails
  - I am aware of natural resource protection and natural resources when riding
  - I would like more information on riding etiquette, safety and ethics
  - Other, please specify
- 

15. What type of off-highway vehicle do you typically ride?

- UTV (side by side)
- Jeep
- ATV (4-wheeler, motorcycle, dirt bike)

**Section 2. Please tell us about yourself.**

16. What is your 5-digit ZIP code (or country of residence, if you live outside the U.S.)? \_\_\_\_\_

17. What is the highest level of education that you have completed?

- Some high school course work
- High school/GED
- Some college course work or 2-year Associate's degree
- Graduated from 4-year college
- Post-graduate degree

18. What is your gender?

- Female
- Male

15. What is your age?

- Under 18
- 18 – 24

- 25 – 34
- 35 – 44
- 45 – 54
- 55 – 64
- 65 – 74
- 75 or older

16. Please write any additional comments about your visit or suggestions on how your experience with MO-MOTO Trail Riders can be more pleasant.

Voluntary if you would like to keep updated on the project, please provide us with your contact information below.

Name

---

Address

---

City/Town

State

Zip

---

Email Address

Phone

---

### Appendix D – Complete Listing of Regional Conservation Areas and Parks

County	Conservation Area/Park
<b>Dent</b>	Clement Memorial Forest and Wilderness Area
<b>Dent</b>	Brown (Gerhild and Graham) Conservation Area
<b>Dent</b>	White River Trace Conservation Area
<b>Dent</b>	Shawnee Mac Lakes Conservation Area
<b>Dent</b>	Indian Trail Conservation Area
<b>Dent</b>	Short Bend Access
<b>Dent</b>	Mark Twain National Forest
<b>Dent</b>	Montauk Towersite
<b>Dent</b>	Montauk Park
<b>Dent</b>	Montauk Fish Hatchery
<b>Dent</b>	Cedar Grove Conservation Area
<b>Dent</b>	Indian Trail State Forest
<b>Iron</b>	Bismark Conservation Area
<b>Iron</b>	Buford Mountain Conservation Area
<b>Iron</b>	Elephant Rocks State Park
<b>Iron</b>	Johnson Shut-Ins State Park
<b>Iron</b>	Mark Twain National Forest

<b>Iron</b>	Ketcherside Mountain Conservation Area
<b>Iron</b>	Funk Memorial State Forest
<b>Iron</b>	Graves Mountain Conservation Area
<b>Madison</b>	Roselle Access
<b>Madison</b>	Millstream Gardens Conservation Area
<b>Madison</b>	Amidon Memorial Conservation Area
<b>Madison</b>	Marquand Access
<b>Madison</b>	Sam A. Baker State Park
<b>Madison</b>	Castor River Conservation Area
<b>Madison</b>	Mark Twain National Forest
<b>Reynolds</b>	Clearwater Conservation Area
<b>Reynolds</b>	Clearwater Lake
<b>Reynolds</b>	Riverside Conservation Area
<b>Reynolds</b>	Current River Conservation Area
<b>Reynolds</b>	Logan Creek Conservation Area
<b>Reynolds</b>	Rocky Creek Conservation Area
<b>Reynolds</b>	Lesterville Access
<b>Reynolds</b>	Centerville Access
<b>Reynolds</b>	Mark Twain National Forest
<b>Reynolds</b>	Johnson Shut-Ins State Park
<b>Shannon</b>	Sunklands Conservation Area
<b>Shannon</b>	Round Spring State Park
<b>Shannon</b>	Mark Twain National Forest
<b>Shannon</b>	Ozark National Scenic Riverway
<b>Shannon</b>	Alley Spring State Park
<b>Shannon</b>	Angeline Conservation Area
<b>Shannon</b>	Current River Conservation Area
<b>Shannon</b>	Rocky Creek Conservation Area
<b>Shannon</b>	Peck Ranch Conservation Area
<b>Shannon</b>	Twin Pines Conservation Education Center
<b>Shannon</b>	Birch Creek Conservation Area
<b>Shannon</b>	Thomasville Towersite