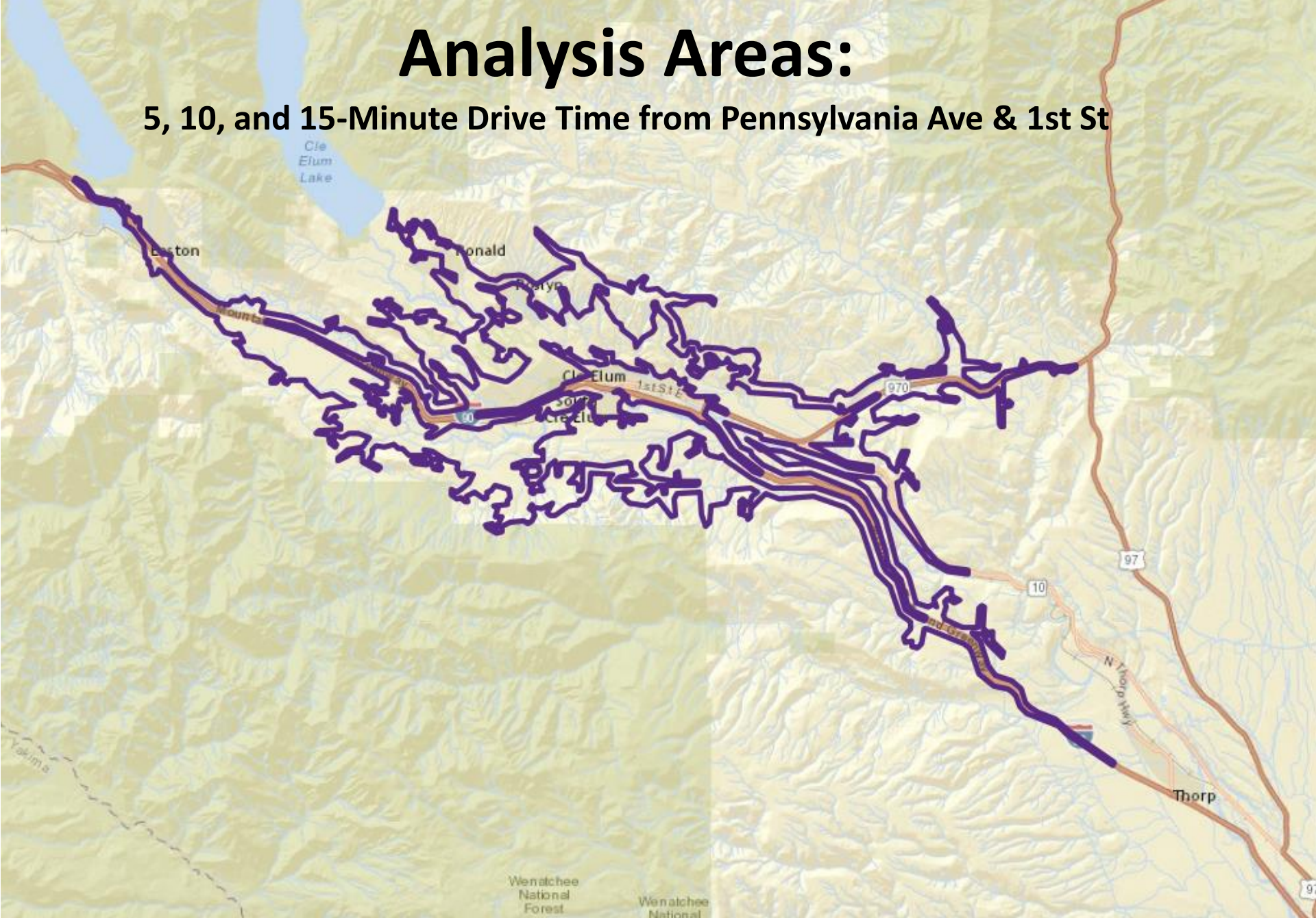




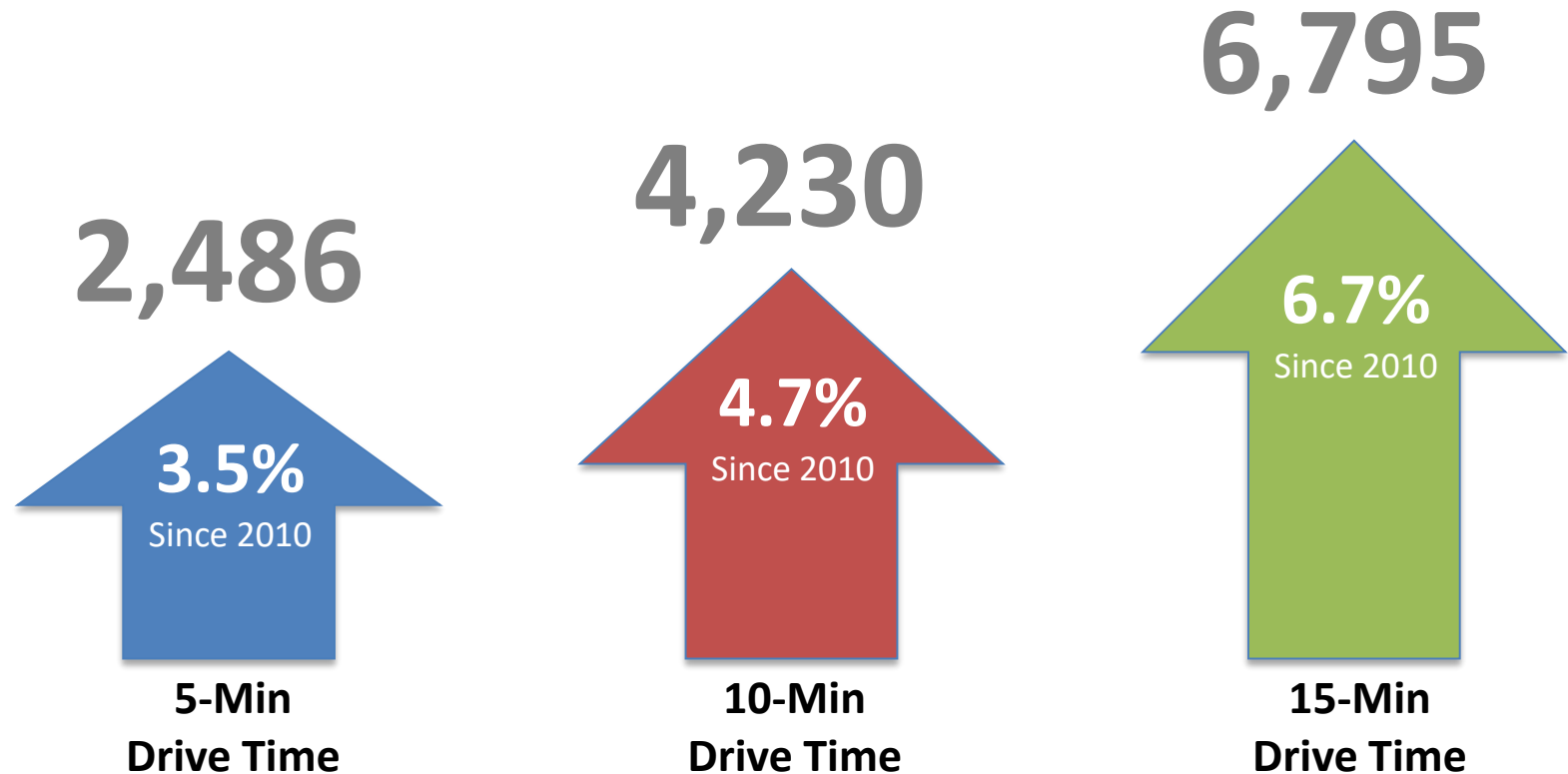


# Analysis Areas:

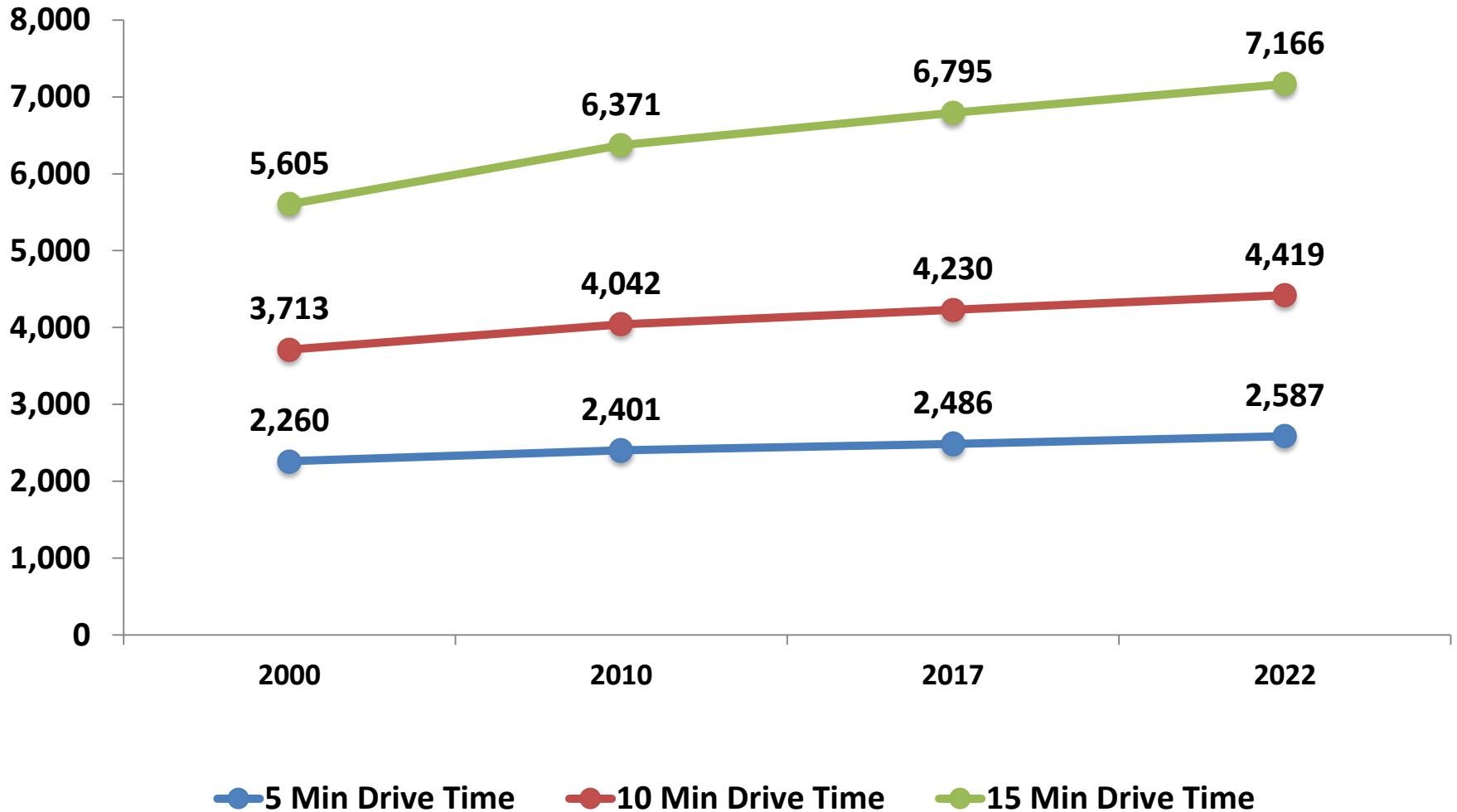
5, 10, and 15-Minute Drive Time from Pennsylvania Ave & 1st St



# 2017 Population



# Population Growth 2000-2022



# Age and Household Size

## 5-Minute Drive Time

- 43.20 Median Age
- 2.20 Avg HH Size

## 10-Minute Drive Time

- 45.27 Median Age
- 2.20 Avg HH Size

## 15-Minute Drive Time

- 48.01 Median Age
- 2.22 Avg HH Size



# Income & Employment

## 5-Minute Drive Time

- \$48,949 Median HH Income
- 14.22% Families Below Poverty
- 6.91% Unemployment Rate

## 10-Minute Drive Time

- \$56,405 Median HH Income
- 11.78% Families Below Poverty
- 6.84% Unemployment Rate

## 15-Minute Drive Time

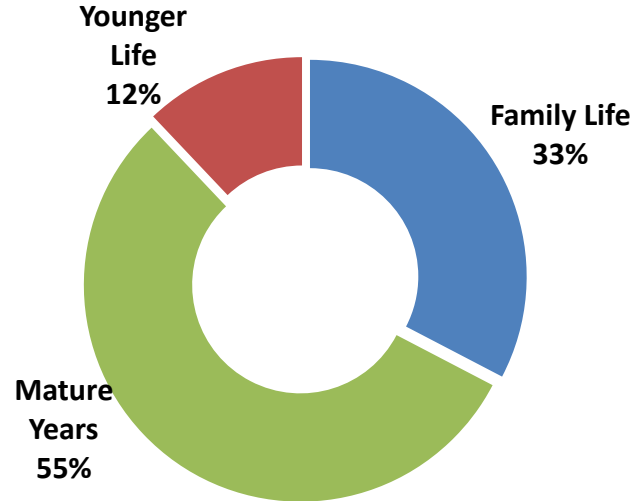
- \$58,400 Median HH Income
- 11.31% Families Below Poverty
- 6.81% Unemployment Rate



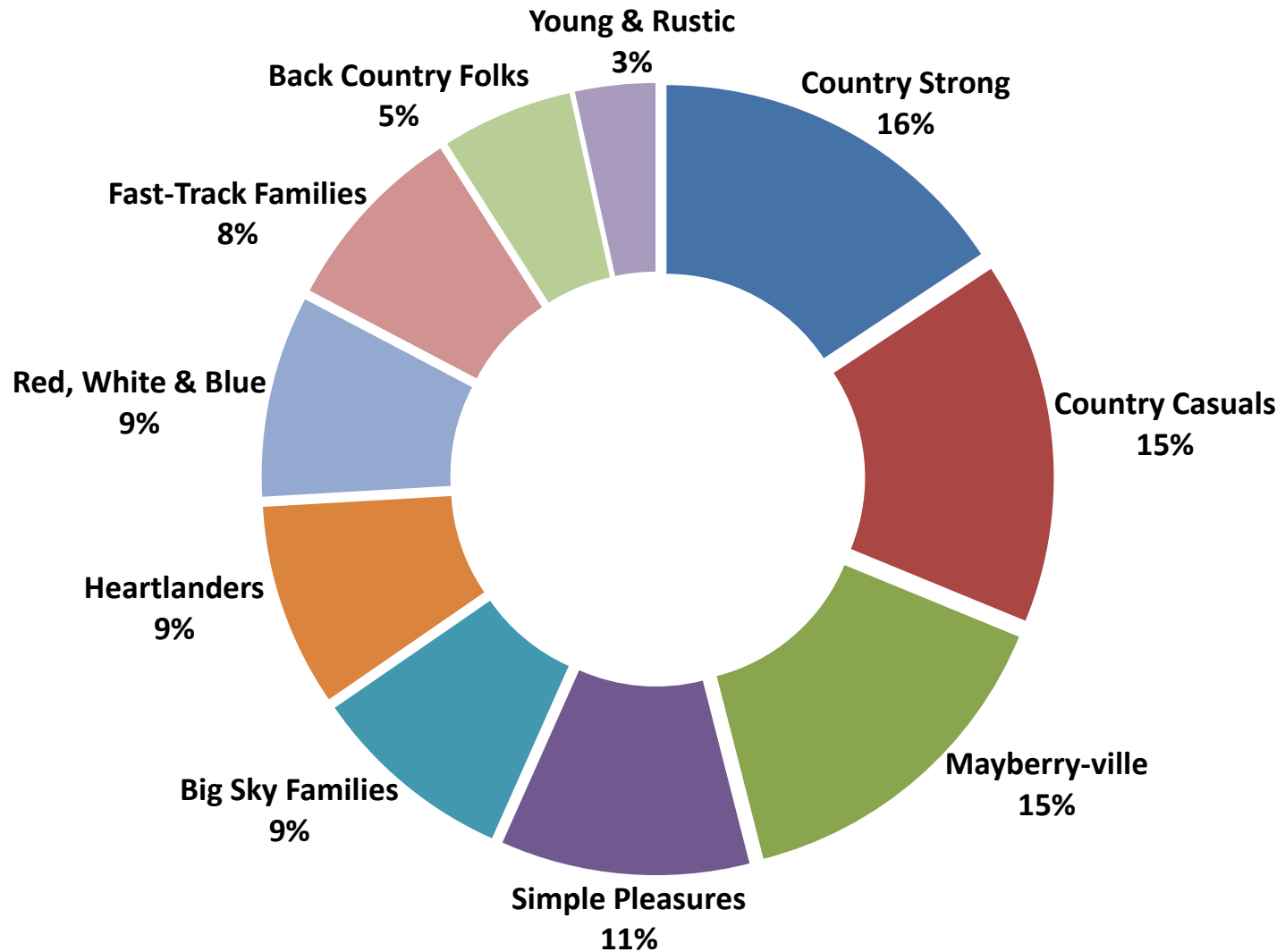
# Market Segmentation

## Life Stage

- Large segment of mature years (55%)
- Small segment of Younger Years (12%)



# Market Segmentation







### Lower Mid(Scale) Middle Age Family Mix

Country Strong are lower middle class families in rural areas that embrace their day-to-day lives. They are focused on their families and prefer hunting and country music to keeping up with the latest technology.

**Social Group:** 13 - T3 Middle America

**Lifestage Group:** 06 - F3 Mainstream Families

### Demographics Traits

- **Urbanicity:** Rural
- **Income:** Lower Mid(Scale)
- **Income Producing Assets:** Below Avg
- **Household Technology:** Below Average
- **Age Ranges:** Age <55
- **Presence of Kids:** Family Mix
- **Homeownership:** Mostly Owners
- **Employment Levels:** Blue Collar Mix
- **Education Levels:** High School

### Lifestyle & Media Traits

- Owns a GMC
- Eats at Hardee's
- Shops at Books-a-Million
- Goes hunting
- Stays at Super 8
- Watches CMT
- Listens to New Country

### Upper Mid(Scale) Older Mostly w/o Kids

There's a laid-back atmosphere in Country Casuals, a collection of older, midscale empty-nest households. Today, these Baby-Boom couples enjoy outdoor activities, like hunting, and going out to eat but are not likely to be up-to-date on technology.

**Social Group:** 12 - T2 Country Comfort

**Lifestage Group:** 09 - M2 Conservative Classics

#### Demographics Traits

- **Urbanicity:** Rural
- **Income:** Upper Mid(Scale)
- **Income Producing Assets:** High
- **Household Technology:** Below Average
- **Age Ranges:** Age 55+
- **Presence of Kids:** Mostly w/o Kids
- **Homeownership:** Mostly Owners
- **Employment Levels:** Mix
- **Education Levels:** Some College

#### Lifestyle & Media Traits

- Owns a GMC
- Eats at Hardee's
- Shops at Hobby Lobby
- Goes hunting
- Stays at Hampton Inn
- Watches Sportsman Channel
- Listens to Classic Country



## 18 - Mayberry-ville

### Upscale Older Mostly w/o Kids

Like the old Andy Griffith Show set in a quaint picturesque burg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, upscale couples prefer outdoor activities like fishing and hunting during the day, and stay home and watch TV at night. Overall, their use of technology trails that of others at their same asset level.



**Social Group:** 12 - T2 Country Comfort

**Lifestage Group:** 09 - M2 Conservative Classics

### Demographics Traits

- **Urbanicity:** Rural
- **Income:** Upscale
- **Income Producing Assets:** Elite
- **Household Technology:** Below Average
- **Age Ranges:** Age 55+
- **Presence of Kids:** Mostly w/o Kids
- **Homeownership:** Mostly Owners
- **Employment Levels:** Mix
- **Education Levels:** Graduate Plus

### Lifestyle & Media Traits

- Owns a Subaru
- Eats at Cracker Barrel
- Shops at Eddie Bauer
- Goes hunting
- Visits Alaska
- Visits PGATour.com
- Listens to Oldies



## 52 - Simple Pleasures

### Lower Mid(Scale) Mature w/o Kids

With many of its residents over 65 years old, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school-educated seniors who held blue-collar jobs before their retirement.

**Social Group:** 13 - T3 Middle America

**Lifestage Group:** 10 - M3 Cautious Couples

### Demographics Traits

- **Urbanicity:** Rural
- **Income:** Lower Mid(Scale)
- **Income Producing Assets:** Above Avg
- **Household Technology:** Lowest
- **Age Ranges:** Age 65+
- **Presence of Kids:** w/o Kids
- **Homeownership:** Mostly Owners
- **Employment Levels:** Mostly Retired
- **Education Levels:** High School

### Lifestyle & Media Traits

- Owns a Buick
- Eats at Bob Evans
- Shops at Chico's
- Follows figure skating
- Visits Alaska
- Watches Fox News
- Listens to Classic Country



# Retail Leakage Analysis

## **RETAIL LEAKAGE**

When local consumers  
buy more than stores sell

OR

## **RETAIL GAIN**

When stores sell more  
than locals buy





# 5-Minute Drive Time Retail Leakage

Stores Sell

**\$83.88 million**

Consumers Buy

**\$45.64 million**

Market Gains

**\$38.25 million**



# 10-Minute Drive Time Retail Leakage

Stores Sell

**\$127.3 million**

Consumers Buy

**\$89.49 million**

Market Gains

**\$37.81 million**



# 15-Minute Drive Time Retail Leakage

Stores Sell

**\$142.76 million**

Consumers Buy

**\$123.42 million**

Market Gains

**\$19.33 million**



Cle Elum WA 15 min Drivetime			
Retail Store Types	2017 Demand (Consumer Expenditures)	2017 Supply (Retail Sales)	2017 Opportunity Gap/Surplus
<b>Demand by Store Type</b>			
Total Retail Sales (incl. Food/Drink)	123,422,496	142,756,748	-19,334,252
Total Retail Sales	109,943,538	131,371,507	-21,427,969
<b>Motor Vehicle &amp; Parts Dealers</b>			
Motor Vehicle & Parts Dealers - 441	27,065,478	13,210,652	13,854,826
Automotive Dealers - 4411	22,982,216	129,235	22,852,981
Other Motor Vehicle Dealers - 4412	2,079,193	9,785,462	-7,706,269
Automotive Parts, Accessories, & Tire Stores - 4413	2,004,068	3,295,955	-1,291,887
<b>Furniture &amp; Home Furnishings Stores</b>			
Furniture & Home Furnishings Stores - 442	2,427,112	6,919,828	-4,492,716
Furniture Stores - 4421	1,274,145	3,347,310	-2,073,165
Home Furnishing Stores - 4422	1,152,967	3,572,518	-2,419,551
<b>Electronics &amp; Appliance Stores</b>			
Electronics & Appliance Stores - 443	1,996,036	1,506,686	489,350
Household Appliances Stores - 443141	308,307	0	308,307
Electronics Stores - 443142	1,687,729	1,506,686	181,043
<b>Building Material &amp; Garden Equipment &amp; Supply Dealers</b>			
Building Material & Garden Equipment & Supply Dealers - 444	13,584,570	35,348,938	-21,764,368
Building Material & Supply Dealers - 4441	12,485,982	32,310,528	-19,824,546
Lawn and Garden Equipment and Supplies Stores - 4442	1,098,588	3,038,410	-1,939,822
<b>Building Material &amp; Supply Dealers</b>			
Home Centers - 44411	5,020,532	11,759,550	-6,739,018
Paint and Wallpaper Stores - 44412	256,362	940,273	-683,911
Hardware Stores - 44413	1,271,780	16,326,656	-15,054,876
Other Building Materials Dealers - 44419	5,937,308	3,284,049	2,653,259
Building Material Dealers, Lumberyards - 444191	2,158,737	1,225,286	933,451
Outdoor Power Equipment Stores - 44421	219,543	1,062,940	-843,397
Nursery and Garden Centers - 44422	879,045	1,975,470	-1,096,425

Cle Elum WA 15 min Drivetime			
Retail Store Types	2017 Demand (Consumer Expenditures)	2017 Supply (Retail Sales)	2017 Opportunity Gap/Surplus
<b>Food &amp; Beverage Stores</b>			
Food & Beverage Stores - 445	15,776,686	27,332,797	-11,556,111
Grocery Stores - 4451	14,312,853	26,665,280	-12,352,427
Supermarkets and Other Grocery (except Convenience) Stores - 44511	13,376,879	25,389,494	-12,012,615
Convenience Stores - 44512	935,974	1,275,786	-339,812
Specialty Food Stores - 4452	531,891	87,323	444,568
Beer, Wine, & Liquor Stores - 4453	931,942	580,195	351,747
<b>Health &amp; Personal Care Stores</b>			
Health & Personal Care Stores - 446	6,915,066	4,573,154	2,341,912
Pharmacies and Drug Stores - 44611	5,673,313	4,339,131	1,334,182
Cosmetics, Beauty Supplies and Perfume Stores - 44612	572,017	0	572,017
Optical Goods Stores - 44613	244,641	234,023	10,618
Other Health and Personal Care Stores - 44619	425,095	0	425,095
<b>Gasoline Stations</b>			
Gasoline Stations - 447	7,642,186	30,766,708	-23,124,522
Gasoline Stations with Convenience Stores - 44711	3,830,968	8,201,407	-4,370,439
Other Gasoline Stations - 44719	3,811,218	22,565,300	-18,754,082
<b>Clothing &amp; Clothing Accessories Stores</b>			
Clothing & Clothing Accessories Stores - 448	4,841,799	861,863	3,979,936
Clothing Stores - 4481	3,598,354	502,640	3,095,714
Men's Clothing Stores - 44811	159,141	0	159,141
Women's Clothing Stores - 44812	810,012	0	810,012
Children's and Infants' Clothing Stores - 44813	182,696	0	182,696
Family Clothing Stores - 44814	1,948,638	235,185	1,713,453
Clothing Accessories Stores - 44815	186,712	0	186,712
Other Clothing Stores - 44819	311,154	267,455	43,699
Shoe Stores - 4482	657,464	0	657,464
Jewelry, Luggage, & Leather Goods Stores - 4483	585,981	359,223	226,758
Jewelry Stores - 44831	530,945	359,223	171,722
Luggage, & Leather Goods Stores - 44832	55,036	0	55,036



Cle Elum WA 15 min Drivetime			
Retail Store Types	2017 Demand (Consumer Expenditures)	2017 Supply (Retail Sales)	2017 Opportunity Gap/Surplus
<b>Sporting Goods, Hobby, Book, &amp; Music Stores</b>			
Sporting Goods, Hobby, Book, & Music Stores - 451	2,139,360	6,061,430	-3,922,070
Sporting Goods, Hobby, & Musical Instrument Stores - 4511	1,817,889	6,061,430	-4,243,541
Sporting Goods Stores - 45111	1,241,982	5,224,851	-3,982,869
Hobby, Toys and Games Stores - 45112	386,907	440,851	-53,944
Sew/Needlework/Piece Goods Stores - 45113	88,390	395,728	-307,338
Musical Instrument and Supplies Stores - 45114	100,611	0	100,611
Book, Periodical, & Music Stores - 4512	321,471	0	321,471
Book Stores and News Dealers - 45121	321,471	0	321,471
Book Stores - 451211	276,484	0	276,484
News Dealers and Newsstands - 451212	44,988	0	44,988
<b>General Merchandise Stores</b>			
General Merchandise Stores - 452	13,285,093	0	13,285,093
Department Stores excluding leased depts. - 4521	6,825,125	0	6,825,125
Other General Merchandise Stores - 4529	6,459,968	0	6,459,968
<b>Miscellaneous Store Retailers</b>			
Miscellaneous Store Retailers - 453	3,412,353	3,651,088	-238,735
Florists - 4531	160,488	0	160,488
Office Supplies, Stationery, & Gift Stores - 4532	1,108,681	2,455,610	-1,346,929
Office Supplies and Stationery Stores - 45321	628,490	0	628,490
Gift, Novelty, and Souvenir Stores - 45322	480,191	2,455,610	-1,975,419
Used Merchandise Stores - 4533	397,619	1,195,478	-797,859
Other Miscellaneous Store Retailers - 4539	1,745,565	0	1,745,565
<b>Non-store Retailers</b>			
Non-store Retailers - 454	10,857,798	1,138,362	9,719,436
<b>Foodservice &amp; Drinking Places</b>			
Foodservice & Drinking Places - 722	13,478,958	11,385,242	2,093,716
Special Foodservices - 7223	1,011,016	16,959	994,057
Drinking Places -Alcoholic Beverages - 7224	432,819	1,037,984	-605,165
Full-Service Restaurants - 722511	6,646,078	10,175,910	-3,529,832
Limited-Service Eating Places - 722513	4,624,785	0	4,624,785
Cafeterias, Grill Buffets, and Buffets - 722514	121,845	5,733	116,112
Snack and Non-alcoholic Beverage Bars - 722515	642,415	148,656	493,759
<b>GAFO</b>			
GAFO (General merchandise, Apparel, Furniture & Other) - (452, 448, 442, 443, 451, 4532)	25,798,081	17,805,417	7,992,664

# Retail Leakage – Opportunities

## Leakage in 15-Minute Drive Time Area, Select Categories

