

APPENDIX J

ECONOMIC DEVELOPMENT PLAN

City of College Place, Comprehensive Plan – Appendix J: Economic Development Plan



Economic Development Element



What you will find in this chapter:

- Information about the local economy, including statistics on population, employment, businesses, and employment sectors.
- Policies and programs that seek to help College Place build a promising economic future.
- Policies that provide a framework for leveraging tourism and promoting College Place as a destination.
- Policies that seek to maintain a qualified workforce and promote living wage jobs.

I. Overview



Image 1: College Place Farmers Market

This chapter contains goals, policies, and programs to define College Place's role in economic development, and to help the city build a healthy economy. Although most economic activity is in the private sector, local government's role is to establish parameters for private markets, provide necessary services, and participate in economic development in some circumstances.

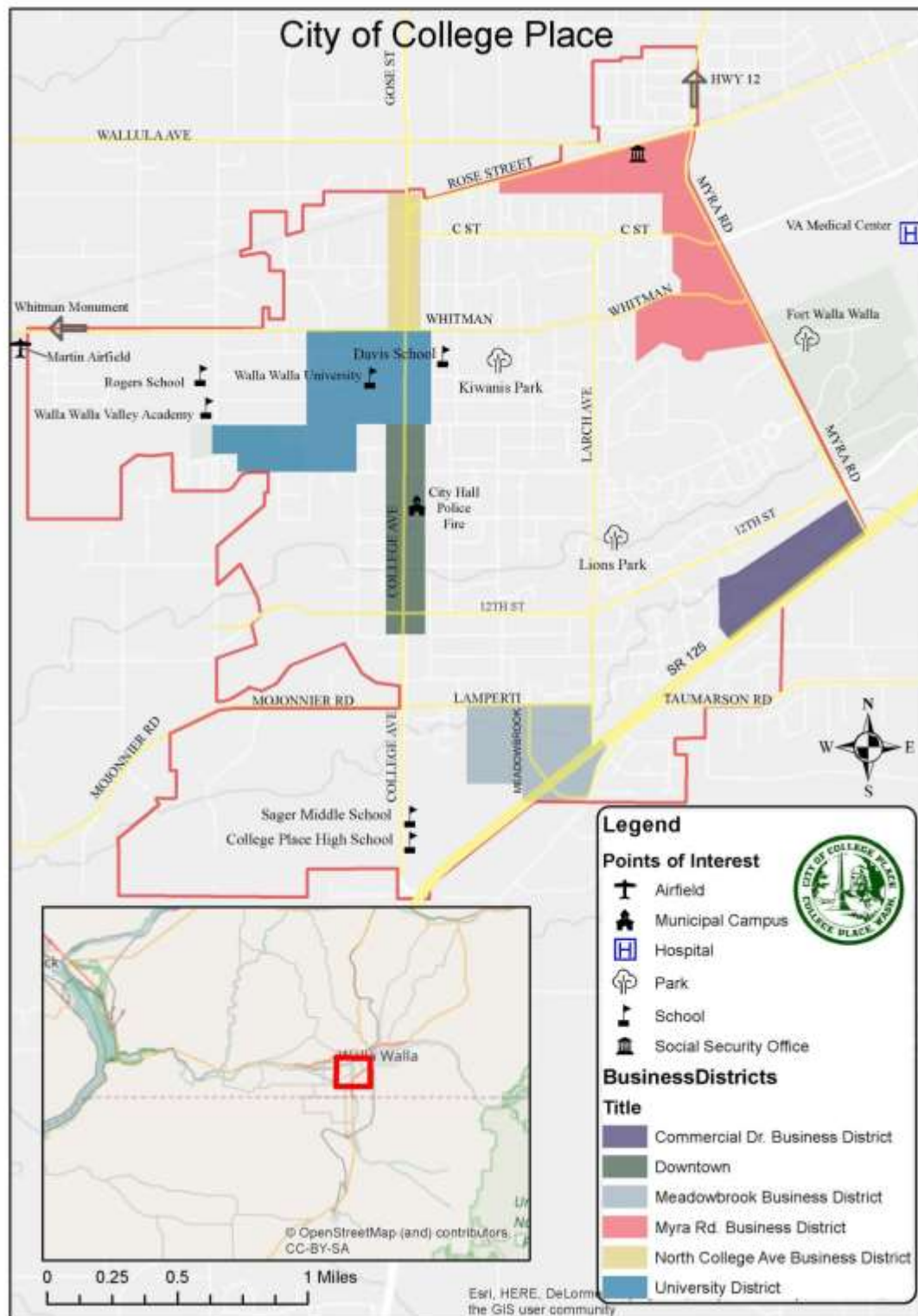
A healthy economy adds to all aspects of the community, from job to infrastructure to community services. A healthy local economy can strengthen the community's position as a unique and attractive place to work, live, play, and visit.

The goals, policies, and programs contained in this chapter aim to guide the City of College Place in developing a supportive business environment for new and existing businesses with the intent of providing a range of employment opportunities for residents, and a strong tax base for the City.

Economic Development – Growth Management Act

An economic development element establishing local goals, policies, objectives, and provisions for economic growth and vitality and a high quality of life. The element shall include: (a) A Summary of the local economy such as population, employment, payroll sectors, businesses, sales, and other information as appropriate; (b) a summary of the strengths and weaknesses of the local economy defined as the commercial and industrial sectors and supporting factors such as land use, transportation, utilities, education, workforce, housing, and natural/cultural resources; and (c) an identification of policies, programs, and projects to foster economic growth and development and to address future needs (RCW 36.70A.070(7)).

II. College Place Business District Map



Map 1: City of College Place Business Districts

III. Economic Data

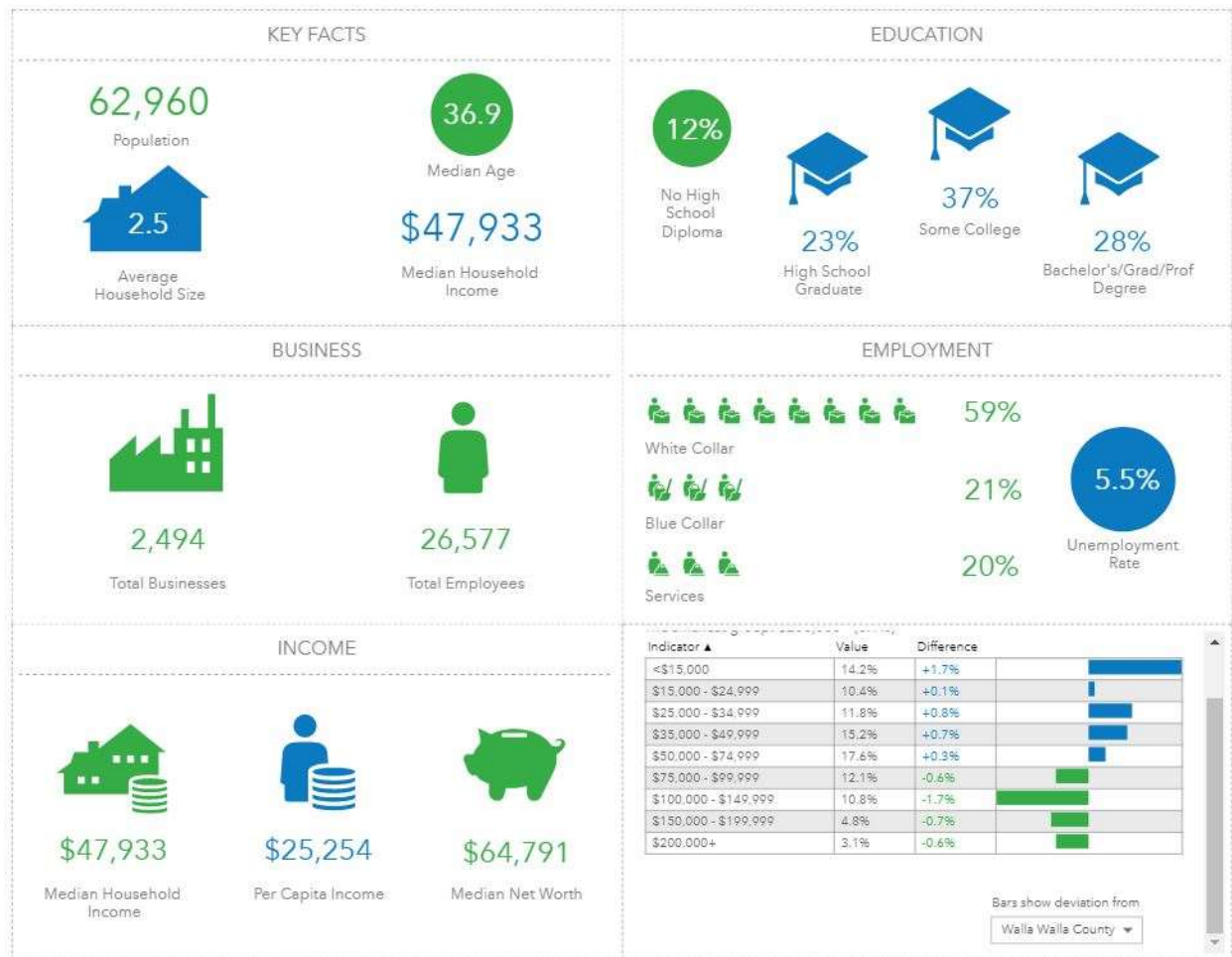
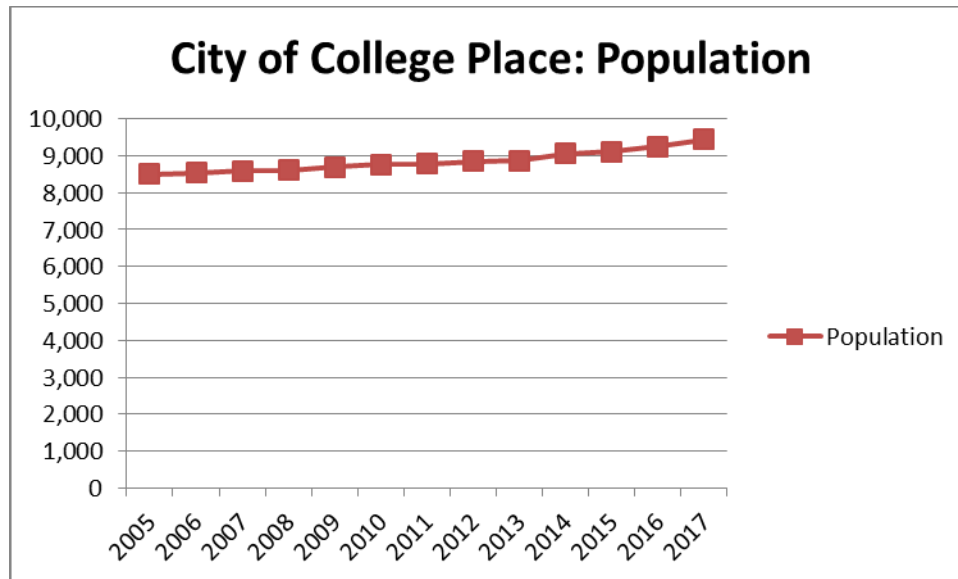


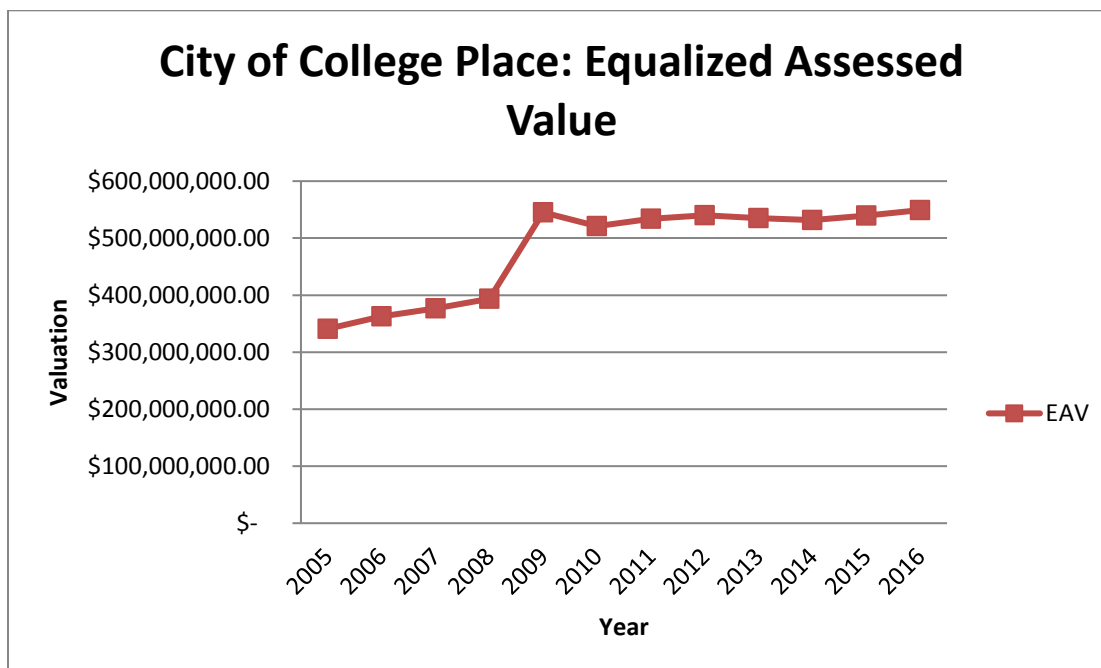
Image 2: Twenty Minute Drive Time Data from Myra Rd Corridor

The following statistics help set the background for economic development policies.

A. Population

Graph 1: College Place Population from Office of Financial Management

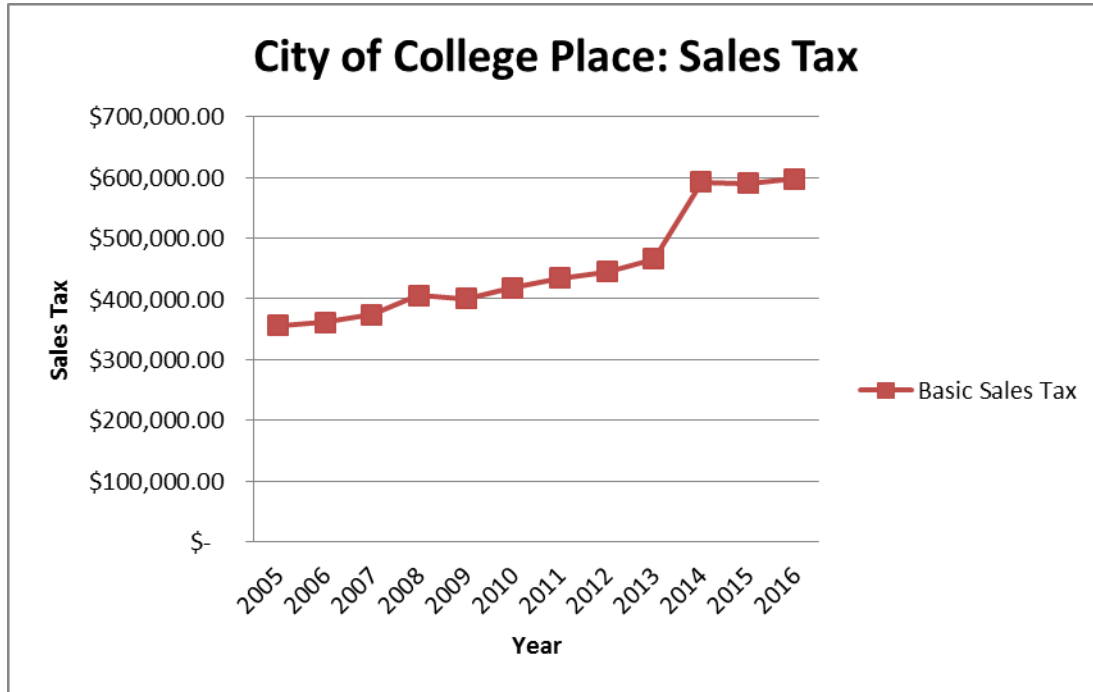
The population of College Place has grown from roughly 11.0% from 8,505 in 2005 to 9,440 in 2017.

B. Equalized Assessed Value

Graph 2: College Place Equalized Assessed Value from Washington Department of Revenue

The equalized assessed value of College Place has grown 61.1% from 2005 at \$340,982,044 to 2017 at \$549,203,100.

C. Retail Sales Tax



Graph 3: College Place Sales Tax from Washington State Department of Revenue

The basic sales tax in College Place has grown 68% from \$355,765.40 in 2005 to \$597,756.40 in 2016.

D. College Place Labor Shed



Image 3: 2015 Employment Density from United States Bureau of Labor Statistics

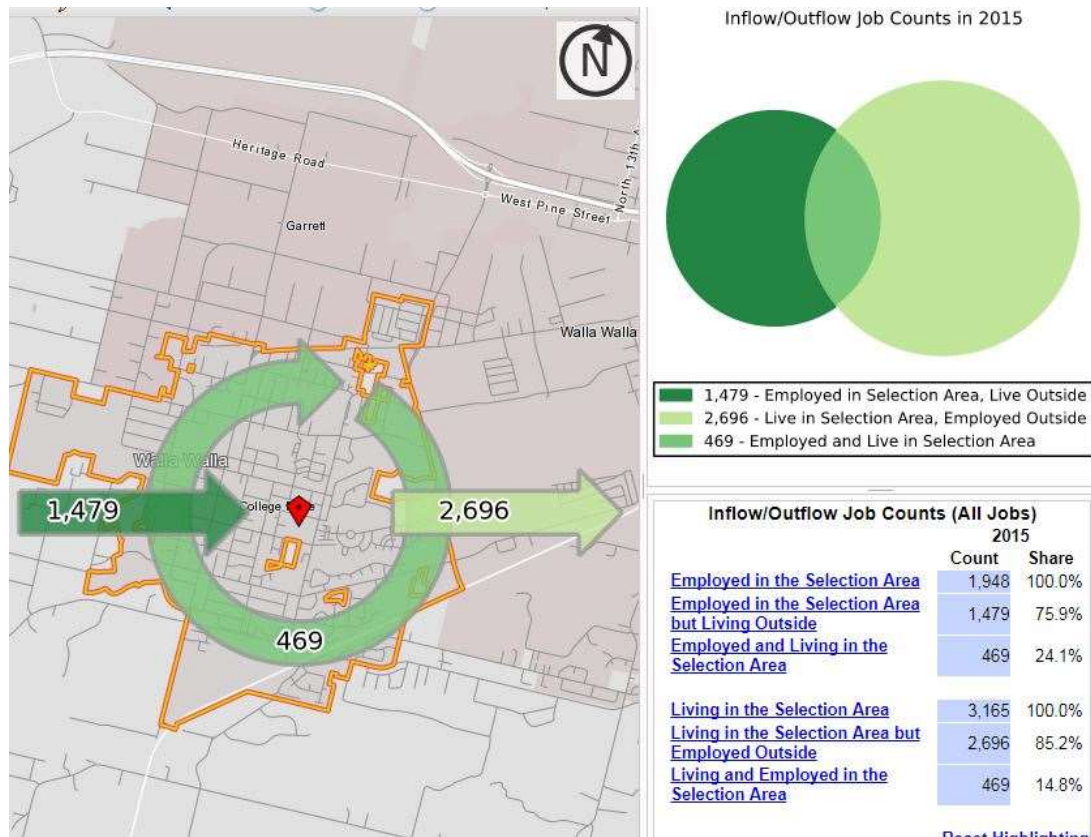


Image 4: Inflow/Outflow Job Counts 2015, United States Bureau of Labor Statistics

As shown in Image 4 in 2015 1,479 people were employed in College Place but living outside, 2,696 lived in the City but worked outside of it, and 469 or 14.8% of those who live in the city also work within it.

College Place Residents: Jobs by NAICS Industry Sector						
Industry	2015		2010		2005	
	Count	Percentage	Count	Percentage	Count	Percentage
Agriculture, Forestry	147	4.6%	136	4.5%	91	3.2%
Mining	5	0.2%	1	0.0%	1	0.0%
Utilities	10	0.3%	8	0.3%	10	0.3%
Construction	115	3.6%	95	3.1%	105	3.6%
Manufacturing	278	8.8%	194	6.4%	213	7.4%
Wholesale Trade	81	2.6%	73	2.4%	81	2.8%
Retail Trade	341	10.8%	365	12.1%	372	12.9%
Transportation & Warehousing	61	1.9%	42	1.4%	40	1.4%
Information	48	1.5%	49	1.6%	45	1.6%
Finance	90	2.8%	114	3.8%	100	3.5%
Real Estate	43	1.4%	29	1.0%	32	1.1%
Professional & Scientific	79	2.5%	57	1.9%	55	1.9%
Management of Companies	11	0.3%	4	0.1%	3	0.1%
Administration & Support	93	2.9%	96	3.2%	73	2.5%
Educational Services	430	13.6%	460	15.2%	485	16.8%
Health Care	687	21.7%	612	20.3%	471	16.4%
Arts & Recreation	36	1.1%	33	1.1%	42	1.5%
Food Services & Accommodation	261	8.2%	195	6.5%	210	7.3%
Other Services	97	3.1%	161	5.3%	169	5.9%
Public Administration	252	8.0%	294	9.7%	282	9.8%
Total	3,165		3,018		2,880	

Table 1: College Place Residents: Jobs by NAICS Industry Code 2015 to 2005 from Bureau of Labor Statistics.

According to Table 1 the number of residents employed increased 9.9% between 2005 and 2015 from 2,880 and 3,165. The most common industry went from a near tie in 2005 of educational services at 16.8% and health care at 16.4% to in 2015 the health care industry dominating at 21.7%.

College Place Workers: Jobs by NAICS Industry Sector						
Industry	2015		2010		2005	
	Count	Percentage	Count	Percentage	Count	Percentage
Agriculture, Forestry	20	1.0%	36	1.8%	21	1.1%
Mining	1	0.1%	1	0.1%	0	0.0%
Utilities	0	0.0%	0	0.0%	0	0.0%
Construction	47	2.4%	57	2.9%	81	4.2%
Manufacturing	26	1.3%	21	1.1%	30	1.5%
Wholesale Trade	9	0.5%	3	0.2%	2	0.1%
Retail Trade	619	31.8%	948	48.7%	727	37.4%
Transportation & Warehousing	7	0.4%	2	0.1%	0	0.0%
Information	10	0.5%	9	0.5%	1	0.1%
Finance	33	1.7%	30	1.5%	16	0.8%
Real Estate	2-	1.0%	8	40.0%	7	0.4%
Professional & Scientific	25	1.3%	2	0.1%	33	1.7%
Management of Companies	0	0.0%	0	0.0%	0	0.0%
Administration & Support	18	0.9%	40	2.1%	22	1.1%
Educational Services	639	32.8%	477	24.5%	551	28.3%
Health Care	309	15.9%	148	7.6%	228	11.7%
Arts & Recreation	2	0.1%	7	0.4%	14	0.7%
Food Services & Accommodation	85	4.4%	29	1.5%	67	3.4%
Other Services	29	1.5%	68	3.5%	77	4.0%
Public Administration	49	2.5%	60	3.1%	67	3.4%
Total	1,928		1,946		1,944	

Table 2: College Place Workers: Jobs by NAICS Industry Standard (2005 to 2015) from Bureau of Labor Statistics.

The number of people who work within the city limits of College Place decreased 0.08% from 1,944 to 1,928 between 2005 and 2015. The largest percentage of the workforce switched from retail trade at 37.4% in 2005 to educational services at 32.8% in 2015.

E. Top Employers in College Place and Walla Walla County

Top College Place Employers - 2017			
Employer Name	FTE	PTE	Total
Walla Walla University	255	193	448
Wal-Mart	161	177	338
Banner Bank	187	15	202
College Place School District	79	62	141
Regency at the Park	89	29	118
Home Depot	50	56	106
Andy's Market			70
Eagle Springs Memory Care	30	12	42
City of College Place	35	5	40

Table 3: Top College Place Employers in 2017 from Port of Walla Walla

The largest employer in the City is Walla Walla University at a total of 448 staff members. This is followed by Wal-Mart at 338 staff members.

Top Walla Walla County Employers - 2017			
Employer Name	FTE	PTE	Total
Broetje Orchards	1300	1100	2400
Tyson Fresh Meats	1380	0	1380
Washington State Penitentiary	1030	59	1089
Providence St. Mary Medical Center	650	311	961
Walla Walla School District #140	570	244	814
Walla Walla Community College	322	292	614
Boise Paper	600	0	600
Whitman College	379	191	570
Walla Walla University	255	193	448
US Dept of Veterans Affairs	393	43	436
Key Technology	431	3	434
US Army Corps of Engineers	350	112	353
Walla Walla County	315	27	342
Wal-Mart	161	177	338
City of Walla Walla	239	67	306
Walla Walla Clinic	175	75	250
Washington Odd Fellows Home	168	53	221
Banner Bank	187	15	202
Nelson Irrigation Corporation	175	10	185
Baker Boyer Bank	160	10	170

Table 4: Top Walla Walla County Employers

The Walla Walla Valley has a diverse economy. The largest employers in the county are out by the Wallula-Burbank employment area with Broetje Orchards at 2,400 employees followed by Tyson Fresh Meats at 1,380 and Boise Paper at 600. The other employers are in the immediate vicinity of College Place.

F. Median Household Income

Median Household Income (2012 to 2016)	
Government	Income
Prescott	\$ 29,000.00
Starbuck	\$ 32,578.00
Dayton	\$ 38,547.00
Milton-Freewater	\$ 40,495.00
College Place	\$ 40,747.00
Walla Walla	\$ 41,817.00
Kahlotus	\$ 45,417.00
Walla Walla County	\$ 48,705.00
Connell	\$ 49,221.00
Waitsburg	\$ 50,313.00
Mesa	\$ 51,146.00
Kennewick	\$ 52,134.00
Prosser	\$ 53,268.00
Benton City	\$ 55,714.00
Pasco	\$ 57,440.00
State of Washington	\$ 62,848.00
Richland	\$ 69,833.00
West Richland	\$ 84,419.00

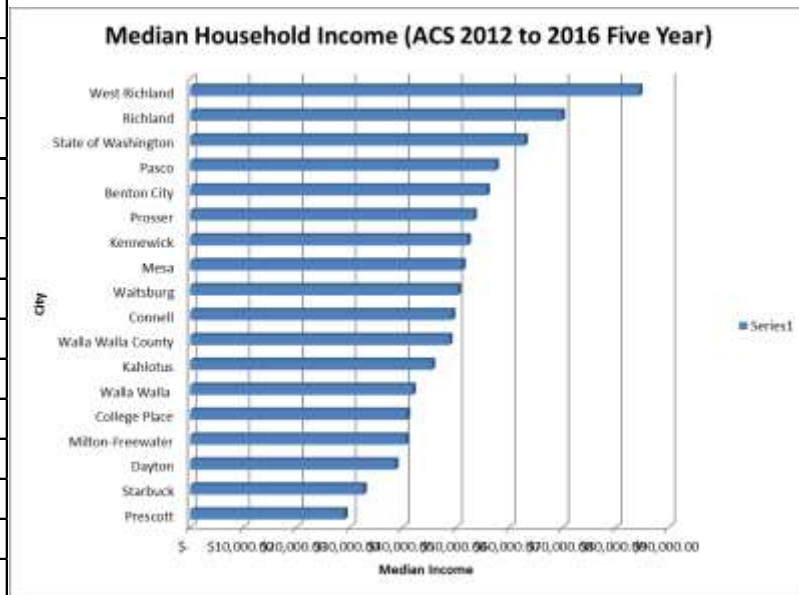


Table 5/Graph 4: Median Household Income (2012 to 2016) from United States Census Bureau

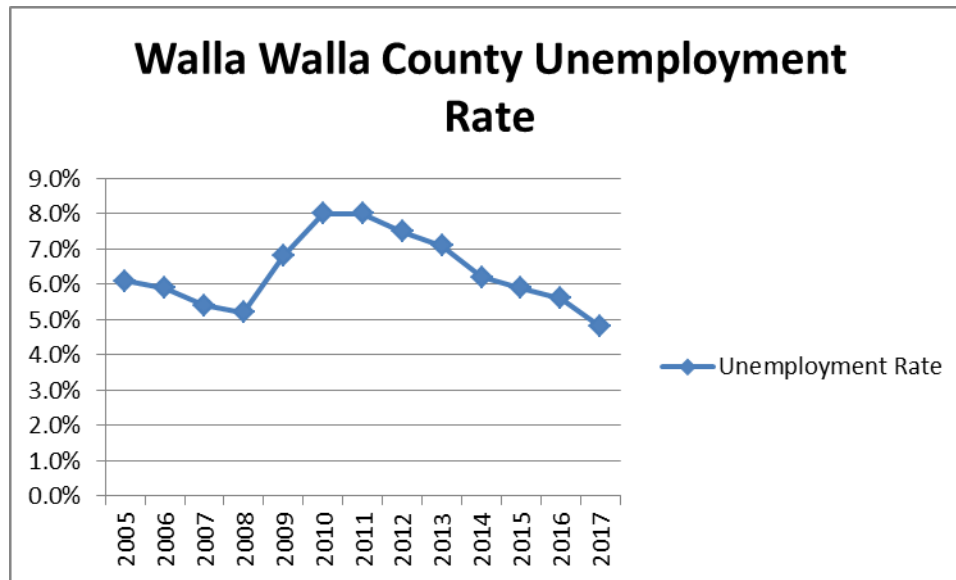
College Place has the fifth lowest median household income of cities within the Benton, Franklin, and Walla Walla County geography at \$40,747. The State of Washington median household income is 45.8% larger than that of College Place.

G. Walla Walla County Labor Force

Average Walla Walla County Resident Labor Force and Employment													
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Civilian Labor Force	28,983	28,717	29,172	30,445	31,127	30,530	29,623	29,564	28,367	28,415	28,041	28,890	29,622
Total Employment	27,229	27,028	27,603	28,862	29,002	28,085	27,252	27,361	26,341	26,667	26,382	27,261	28,205
Total Unemployment	1,754	1,689	1,569	1,583	2,125	2,445	2,371	2,203	2,026	1,748	1,659	1,629	1,417
Unemployment Rate	6.1%	5.9%	5.4%	5.2%	6.8%	8.0%	8.0%	7.5%	7.1%	6.2%	5.9%	5.6%	4.8%

Table 6: Walla Walla County Labor Force from Port of Walla Walla

The civilian labor force in the county has increased from 28,983 in 2005 to 29,622 in 2017. The unemployment rate went from a high of 8% in 2010 and 2011 to 4.8% in 2017.



Graph 5: Walla Walla County Unemployment Rate from State of Washington Department of Labor

H. Drive Time Market Information

Retailers are interested in demographic information presented in a format of drive-times or the amount of population or potential consumers within a 20,40,60 minute drive time. Datasets reflecting such are located in Appendix A.

III. Issues

During the last half of 2017 the City conducted a survey that was available online and in paper format at various places around the City to gauge community opinion on economic development issues. The survey garnered 129 responses which is representative of 1.37% of the College Place population. The Economic Development Commission also went through a Strengths, Weaknesses, Opportunities, and Threats exercise during its November 6th, 2017. Common threads from both the survey and the Commission exercise are located below.

A. Strengths



Image 5: Strengths.

B. Weaknesses

Image 6: Weaknesses

C. Opportunities

Image 7: Opportunities

D. Threats

Image 8: Threats

Vi. Goals, Objectives, & Programs



Image 9: College Avenue

These economic development goals, policies, and programs are designed to work with the other elements to help stimulate economic growth and focus on areas that take into account College Place's unique characteristics and opportunities for growth.

Goal ED-1: Strengthen city partnerships and resources to support economic opportunities.

Policies

- ED-1.1 Coordinate with economic development groups (Port of Walla Walla, Walla Walla Valley Chamber, State) to recruit new businesses.
- ED-1.2 Strengthen collaboration among the business community, economic development stakeholders, Walla Walla University, healthcare organizations, local government, tourism organizations, and other higher education institutions.
- ED-1.3 Partner with local organizations to establish training, funding, and business development opportunities for small businesses.

- ED-1.4 Develop, refine, and implement economic monitoring in accordance with the Strategic Plan to help advance the City's economic development policies and programs.
- ED-1.5 When evaluating future locations for particular land use districts and zoning designations, consider local and regional market needs (i.e. trip counts, visibility, etc.) of the types of businesses likely to locate in those areas.
- ED-1.6 Direct capital improvements to key areas to create a sense of place, and grow and attract business.

Goal ED-2: Improve the business climate in College Place.Policies

- ED-2.1 Develop identity for City of College Place
- ED-2.2 Figure out ways to overcome the perception that all of College Place is closed on Fridays and Saturdays.
- ED-2.3 Work with the business community to create a Downtown Business Association.
- ED-2.4 Develop and implement a parking strategy for the College Avenue corridor.
- ED-2.5 Double down on code enforcement to improve quality of life which encourages investment.
- ED-2.6 Create incentives to attract employers to College Place.
- ED-2.7 Ensure timely and coordinated permitting and regulations.

Goal ED-3: Stimulate and diversify College Place's economy.Policies

- ED-3.01 Market to a variety of business-both large and small- that provide goods and services to local and regional populations.
- ED-3.02 Recruit light industrial employers who offer living wage jobs to Southwest College Place (SR 125 corridor).

- ED-3.03 Partner with the Port of Walla Walla with the establishment of a light-industrial/office park within the city limits.
- ED-3.04 Promote economic activity to diversify sources of revenue and expand the employment base.
- ED-3.05 Partner with economic development agencies to establish a Maker Space in College Place.
- ED-3.06 Establish a multi-use recreation facility with ballfields in College Place to attract regional youth tournaments.
- ED-3.07 Develop sensible regulations to allow for singular food trucks, food cart pods, and pop-up temporary uses for commercially zoned property.
- ED-3.08 Identify or develop a landmark and asset that can be a draw for tourists.
- ED-3.09 Explore establishment of a combination library and recreation center within the City.
- ED-3.10 Establish incentives and development flexibility to retain existing businesses, attract new businesses, and encourage quality development.
- ED-3.11 Coordinate with economic development stakeholders to assist businesses in creating strategies and action plans.

Goal ED-4: Maintain the city's infrastructure so that it meets the needs of existing employers and targeted industries.

Policies

- ED-4.1 Continue to provide high quality and cost efficient city services and facilities, and promote these as one of College Place's economic development assets.
- ED-4.2 Rebuild Well #1 and #2 to be a sustainable long-term asset to the city's water system.
- ED-4.3 Proactively maintain city infrastructure systems.
- ED-4.4 Conduct preventative maintenance in the city's park and urban forestry system.

Goal ED-5: Develop a diverse portfolio of sites ready for business that provide College Place a competitive advantage because infrastructure is in place and owners are willing to sell/lease.

Policies

- ED-5.1 Inventory available sites on the market and potentially on the market.
- ED-5.2 Develop a system for maintaining complete information (zoning, infrastructure, planned and funded infrastructure, incentive zones, pricing, terms, etc) online.

Goal ED-6: Support the development and redevelopment of a walkable College Avenue from Rose Street to 13th as a Mixed-Use Downtown District that serves as an attractive location for diverse small businesses, tourism, arts and culture, entertainment, community events, and residents.

Policies

- ED-6.1 Continue wayfinding/placemaking work throughout the corridor.
- ED-6.2 Partner with Walla Walla University to develop a mix of uses near campus that is beneficial to all parties involved.
- ED-6.3 Partner with economic development groups to inventory and share information regarding vacant building and lot space.
- ED-6.4 Work with property owners on rehabilitation or redevelopment options for properties along corridor.
- ED-6.5 Develop parking management strategy for the corridor.
- ED-6.6 Develop a connected network of pedestrian and bicycle infrastructure throughout the corridor.

Goal ED-7: Support the development of the Myra Rd and State Route 125 corridors for big box stores and chain restaurants.

Policies

- ED-7.1 Pursue big box and restaurant/fast casual dining options that is appropriate for our market.
- ED-7.2 Review development regulations to ensure parking, landscaping, and other setback requirements are appropriate for development.
- ED-7.3 Develop a connected network of pedestrian and bicycle infrastructure throughout the corridor.

Goal ED-8: Grow and sustain a qualified workforce.Policies

- ED-8.1 Consider public/private sponsorship of entrepreneurial education.
- ED-8.2 Encourage organizational partnerships that focus resources toward increasing the employability of all citizens.
- ED-8.3 Encourage student internship programs with local businesses.
- ED-8.4 Diversify and expand the city's jobs base, with focus on attracting living-wage jobs, to allow people to work and live in the community.

Goal ED-9: Embrace tourism as an economic development tool.Policies

- ED-9.1 Partner with Visit Walla Walla to advertise to targeted interests at the regional and national level.
- ED-9.2 Keep detailed and updated content management platforms such as websites and mobile applications.
- ED-9.3 Support visitor information kiosks.
- ED-9.4 Embrace our historic properties and develop tourism activities around that market.
- ED-9.5 Explore the development of sports complex consisting of ball fields that could host regional youth tournaments.
- ED-9.6 Embrace bicyclists and build upon the successful bike tourism industry throughout the Walla Walla Valley by adding bike trails and routes in accordance with the Blue Mountain Regional Trails plan.

Goal ED-10: Support programs, projects, and development efforts that enhance the job market and promote community pride.Policies

- ED-10.1 Support maintaining and growing new community events such as the Farmer's Market, Independence Day, Halloween, and Winterfest.
- ED-10.2 Recruit lodging facilities to the City that could have space for conferences.

- ED-10.3 Support educational resources that are aligned to meet the comprehensive current and future needs of employers in College Place.

Goal ED-11: Capitalize on the burgeoning Walla Walla Valley wine industry.

- ED-11.1 Recruit wineries at appropriately zoned areas near the State Route 125 corridor.
- ED-11.2 Recruit ancillary businesses integral to wine tourism such as restaurants, hotels, and light industrial to the city.



Restaurant Market Potential

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

Demographic Summary		2017	2022	
Population		9,084	9,294	
Population 18+		7,446	7,627	
Households		3,601	3,680	
Median Household Income		\$48,082	\$52,280	
Product/Consumer Behavior	Expected Number of			
	Adults	Percent	MPI	
Went to family restaurant/steak house in last 6 mo		5,523	74.2%	99
Went to family restaurant/steak house 4+ times/mo		1,961	26.3%	96
Spent at family rest/steak hse last 6 months: <\$31		670	9.0%	118
Spent at family rest/steak hse last 6 months: \$31-50		724	9.7%	113
Spent at family rest/steak hse last 6 months: \$51-100		1,089	14.6%	99
Spent at family rest/steak hse last 6 months: \$101-200		758	10.2%	91
Spent at family rest/steak hse last 6 months: \$201-300		278	3.7%	79
Spent at family rest/steak hse last 6 months: \$301+		392	5.3%	86
Family restaurant/steak house last 6 months: breakfast		1,001	13.4%	106
Family restaurant/steak house last 6 months: lunch		1,580	21.2%	111
Family restaurant/steak house last 6 months: dinner		3,397	45.6%	99
Family restaurant/steak house last 6 months: snack		198	2.7%	139
Family restaurant/steak house last 6 months: weekday		2,434	32.7%	106
Family restaurant/steak house last 6 months: weekend		2,984	40.1%	97
Fam rest/steak hse/6 months: Applebee`s		1,931	25.9%	114
Fam rest/steak hse/6 months: Bob Evans Farms		430	5.8%	156
Fam rest/steak hse/6 months: Buffalo Wild Wings		628	8.4%	88
Fam rest/steak hse/6 months: California Pizza Kitchen		134	1.8%	57
Fam rest/steak hse/6 months: Carrabba`s Italian Grill		213	2.9%	86
Fam rest/steak hse/6 months: The Cheesecake Factory		246	3.3%	53
Fam rest/steak hse/6 months: Chili`s Grill & Bar		750	10.1%	91
Fam rest/steak hse/6 months: CiCi`s Pizza		308	4.1%	105
Fam rest/steak hse/6 months: Cracker Barrel		886	11.9%	114
Fam rest/steak hse/6 months: Denny`s		731	9.8%	111
Fam rest/steak hse/6 months: Golden Corral		612	8.2%	109
Fam rest/steak hse/6 months: IHOP		627	8.4%	80
Fam rest/steak hse/6 months: Logan`s Roadhouse		313	4.2%	113
Fam rest/steak hse/6 months: LongHorn Steakhouse		333	4.5%	91
Fam rest/steak hse/6 months: Olive Garden		1,401	18.8%	111
Fam rest/steak hse/6 months: Outback Steakhouse		719	9.7%	106
Fam rest/steak hse/6 months: Red Lobster		920	12.4%	108
Fam rest/steak hse/6 months: Red Robin		472	6.3%	98
Fam rest/steak hse/6 months: Ruby Tuesday		447	6.0%	104
Fam rest/steak hse/6 months: Texas Roadhouse		601	8.1%	100
Fam rest/steak hse/6 months: T.G.I. Friday`s		416	5.6%	80
Fam rest/steak hse/6 months: Waffle House		380	5.1%	93
Went to fast food/drive-in restaurant in last 6 mo		6,857	92.1%	102
Went to fast food/drive-in restaurant 9+ times/mo		2,800	37.6%	96
Spent at fast food/drive-in last 6 months: <\$11		421	5.7%	125
Spent at fast food/drive-in last 6 months: \$11-\$20		617	8.3%	99
Spent at fast food/drive-in last 6 months: \$21-\$40		992	13.3%	106
Spent at fast food/drive-in last 6 months: \$41-\$50		678	9.1%	117
Spent at fast food/drive-in last 6 months: \$51-\$100		1,205	16.2%	97
Spent at fast food/drive-in last 6 months: \$101-\$200		843	11.3%	103
Spent at fast food/drive-in last 6 months: \$201+		695	9.3%	94

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults 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 2017 and 2022.

May 11, 2018



Restaurant Market Potential

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

Product/Consumer Behavior	Expected Number of		MPI
	Adults	Percent	
Fast food/drive-in last 6 months: eat in	2,820	37.9%	104
Fast food/drive-in last 6 months: home delivery	545	7.3%	95
Fast food/drive-in last 6 months: take-out/drive-thru	3,647	49.0%	106
Fast food/drive-in last 6 months: take-out/walk-in	1,609	21.6%	107
Fast food/drive-in last 6 months: breakfast	2,449	32.9%	100
Fast food/drive-in last 6 months: lunch	3,852	51.7%	104
Fast food/drive-in last 6 months: dinner	3,655	49.1%	109
Fast food/drive-in last 6 months: snack	951	12.8%	106
Fast food/drive-in last 6 months: weekday	4,667	62.7%	107
Fast food/drive-in last 6 months: weekend	3,518	47.2%	103
Fast food/drive-in last 6 months: A & W	301	4.0%	150
Fast food/drive-in last 6 months: Arby's	1,492	20.0%	123
Fast food/drive-in last 6 months: Baskin-Robbins	159	2.1%	63
Fast food/drive-in last 6 months: Boston Market	178	2.4%	69
Fast food/drive-in last 6 months: Burger King	2,452	32.9%	111
Fast food/drive-in last 6 months: Captain D's	238	3.2%	91
Fast food/drive-in last 6 months: Carl's Jr.	334	4.5%	79
Fast food/drive-in last 6 months: Checkers	270	3.6%	115
Fast food/drive-in last 6 months: Chick-fil-A	1,338	18.0%	95
Fast food/drive-in last 6 months: Chipotle Mex. Grill	715	9.6%	81
Fast food/drive-in last 6 months: Chuck E. Cheese's	197	2.6%	82
Fast food/drive-in last 6 months: Church's Fr. Chicken	196	2.6%	74
Fast food/drive-in last 6 months: Cold Stone Creamery	247	3.3%	117
Fast food/drive-in last 6 months: Dairy Queen	1,339	18.0%	120
Fast food/drive-in last 6 months: Del Taco	194	2.6%	73
Fast food/drive-in last 6 months: Domino's Pizza	964	12.9%	107
Fast food/drive-in last 6 months: Dunkin' Donuts	785	10.5%	84
Fast food/drive-in last 6 months: Hardee's	470	6.3%	112
Fast food/drive-in last 6 months: Jack in the Box	400	5.4%	64
Fast food/drive-in last 6 months: KFC	1,629	21.9%	104
Fast food/drive-in last 6 months: Krispy Kreme	317	4.3%	85
Fast food/drive-in last 6 months: Little Caesars	1,076	14.5%	122
Fast food/drive-in last 6 months: Long John Silver's	416	5.6%	126
Fast food/drive-in last 6 months: McDonald's	4,140	55.6%	104
Went to Panda Express in last 6 months	423	5.7%	70
Fast food/drive-in last 6 months: Panera Bread	672	9.0%	78
Fast food/drive-in last 6 months: Papa John's	700	9.4%	109
Fast food/drive-in last 6 months: Papa Murphy's	491	6.6%	137
Fast food/drive-in last 6 months: Pizza Hut	1,690	22.7%	117
Fast food/drive-in last 6 months: Popeyes Chicken	500	6.7%	85
Fast food/drive-in last 6 months: Quiznos	115	1.5%	63
Fast food/drive-in last 6 months: Sonic Drive-In	898	12.1%	108
Fast food/drive-in last 6 months: Starbucks	972	13.1%	82
Fast food/drive-in last 6 months: Steak 'n Shake	416	5.6%	105
Fast food/drive-in last 6 months: Subway	2,453	32.9%	106
Fast food/drive-in last 6 months: Taco Bell	2,469	33.2%	109
Fast food/drive-in last 6 months: Wendy's	2,242	30.1%	111
Fast food/drive-in last 6 months: Whataburger	264	3.5%	81
Fast food/drive-in last 6 months: White Castle	183	2.5%	77

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults 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 2017 and 2022.

May 11, 2018



Restaurant Market Potential

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

Went to fine dining restaurant last month	744	10.0%	93
Went to fine dining restaurant 3+ times last month	170	2.3%	74
Spent at fine dining rest in last 6 months: <\$51	175	2.4%	124
Spent at fine dining rest in last 6 months: \$51-\$100	272	3.7%	108
Spent at fine dining rest in last 6 months: \$101-\$200	200	2.7%	83
Spent at fine dining rest in last 6 months: \$201+	161	2.2%	64

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults 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 2017 and 2022.

May 11, 2018



Retail Goods and Services Expenditures

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

Top Tapestry Segments	Percent	Demographic Summary	2017	2022
Midlife Constants (5E)	41.3%	Population	9,084	9,294
Old and Newcomers (8F)	25.3%	Households	3,601	3,680
Set to Impress (11D)	14.8%	Families	2,174	2,214
College Towns (14B)	12.2%	Median Age	34.3	35.6
Salt of the Earth (6B)	3.9%	Median Household Income	\$48,082	\$52,280
		Spending Potential Index	Average Amount Spent	Total
Apparel and Services		77	\$1,663.82	\$5,991,420
Men's		78	\$329.32	\$1,185,870
Women's		78	\$574.97	\$2,070,455
Children's		77	\$256.66	\$924,228
Footwear		77	\$354.19	\$1,275,447
Watches & Jewelry		75	\$89.45	\$322,110
Apparel Products and Services (1)		72	\$59.24	\$213,310
Computer				
Computers and Hardware for Home Use		80	\$137.78	\$496,160
Portable Memory		81	\$4.32	\$15,566
Computer Software		81	\$9.31	\$33,535
Computer Accessories		79	\$14.32	\$51,584
Entertainment & Recreation		78	\$2,438.59	\$8,781,375
Fees and Admissions		73	\$462.40	\$1,665,097
Membership Fees for Clubs (2)		73	\$154.18	\$555,210
Fees for Participant Sports, excl. Trips		74	\$73.71	\$265,437
Tickets to Theatre/Operas/Concerts		75	\$44.91	\$161,719
Tickets to Movies/Museums/Parks		75	\$57.96	\$208,708
Admission to Sporting Events, excl. Trips		77	\$43.24	\$155,707
Fees for Recreational Lessons		66	\$87.67	\$315,687
Dating Services		90	\$0.73	\$2,629
TV/Video/Audio		81	\$1,044.01	\$3,759,474
Cable and Satellite Television Services		82	\$778.44	\$2,803,148
Televisions		80	\$95.59	\$344,205
Satellite Dishes		71	\$1.04	\$3,731
VCRs, Video Cameras, and DVD Players		83	\$5.42	\$19,517
Miscellaneous Video Equipment		76	\$7.25	\$26,103
Video Cassettes and DVDs		82	\$12.52	\$45,095
Video Game Hardware/Accessories		84	\$24.63	\$88,685
Video Game Software		88	\$13.59	\$48,939
Streaming/Downloaded Video		83	\$21.17	\$76,247
Rental of Video Cassettes and DVDs		80	\$12.23	\$44,035
Installation of Televisions		70	\$0.62	\$2,245
Audio (3)		76	\$68.04	\$245,006
Rental and Repair of TV/Radio/Sound Equipment		86	\$3.48	\$12,518
Pets		78	\$467.33	\$1,682,857
Toys/Games/Crafts/Hobbies (4)		79	\$95.86	\$345,184
Recreational Vehicles and Fees (5)		73	\$74.33	\$267,646
Sports/Recreation/Exercise Equipment (6)		76	\$129.89	\$467,720
Photo Equipment and Supplies (7)		77	\$42.49	\$153,010
Reading (8)		80	\$100.37	\$361,442
Catered Affairs (9)		72	\$21.92	\$78,944
Food		79	\$6,651.74	\$23,952,927
Food at Home		80	\$4,027.70	\$14,503,741
Bakery and Cereal Products		80	\$532.84	\$1,918,760
Meats, Poultry, Fish, and Eggs		80	\$916.74	\$3,301,188
Dairy Products		80	\$427.40	\$1,539,076
Fruits and Vegetables		79	\$771.18	\$2,777,010
Snacks and Other Food at Home (10)		80	\$1,379.54	\$4,967,708
Food Away from Home		79	\$2,624.05	\$9,449,186
Alcoholic Beverages		78	\$436.12	\$1,570,471

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.

Source: Esri forecasts for 2017 and 2022; Consumer Spending data are derived from the 2014 and 2015 Consumer Expenditure Surveys, Bureau of Labor Statistics.

May 11, 2018



Retail Goods and Services Expenditures

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

	Spending Potential Index	Average Amount Spent	Total
Financial			
Value of Stocks/Bonds/Mutual Funds	75	\$4,653.70	\$16,757,976
Value of Retirement Plans	74	\$17,975.32	\$64,729,125
Value of Other Financial Assets	81	\$1,055.53	\$3,800,962
Vehicle Loan Amount excluding Interest	81	\$2,192.26	\$7,894,327
Value of Credit Card Debt	77	\$447.74	\$1,612,327
Health			
Nonprescription Drugs	80	\$102.72	\$369,910
Prescription Drugs	81	\$315.22	\$1,135,099
Eyeglasses and Contact Lenses	79	\$74.92	\$269,789
Home			
Mortgage Payment and Basics (11)	71	\$6,094.06	\$21,944,723
Maintenance and Remodeling Services	73	\$1,409.74	\$5,076,458
Maintenance and Remodeling Materials (12)	72	\$292.21	\$1,052,261
Utilities, Fuel, and Public Services	80	\$4,048.69	\$14,579,328
Household Furnishings and Equipment			
Household Textiles (13)	78	\$74.82	\$269,424
Furniture	79	\$451.45	\$1,625,673
Rugs	76	\$17.71	\$63,770
Major Appliances (14)	77	\$245.90	\$885,485
Housewares (15)	78	\$74.45	\$268,084
Small Appliances	81	\$39.11	\$140,831
Luggage	74	\$8.79	\$31,635
Telephones and Accessories	81	\$56.40	\$203,091
Household Operations			
Child Care	71	\$339.04	\$1,220,899
Lawn and Garden (16)	77	\$320.90	\$1,155,560
Moving/Storage/Freight Express	81	\$51.72	\$186,255
Housekeeping Supplies (17)	79	\$565.83	\$2,037,563
Insurance			
Owners and Renters Insurance	78	\$400.92	\$1,443,730
Vehicle Insurance	80	\$940.31	\$3,386,062
Life/Other Insurance	74	\$317.14	\$1,142,035
Health Insurance	79	\$2,877.23	\$10,360,888
Personal Care Products (18)	79	\$370.91	\$1,335,664
School Books and Supplies (19)	80	\$123.61	\$445,107
Smoking Products	88	\$367.34	\$1,322,806
Transportation			
Payments on Vehicles excluding Leases	79	\$1,779.14	\$6,406,679
Gasoline and Motor Oil	80	\$2,231.05	\$8,034,020
Vehicle Maintenance and Repairs	79	\$850.04	\$3,060,980
Travel			
Airline Fares	73	\$373.90	\$1,346,426
Lodging on Trips	75	\$391.49	\$1,409,764
Auto/Truck Rental on Trips	73	\$19.20	\$69,153
Food and Drink on Trips	75	\$372.00	\$1,339,565

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.

Source: Esri forecasts for 2017 and 2022; Consumer Spending data are derived from the 2014 and 2015 Consumer Expenditure Surveys, Bureau of Labor Statistics.

May 11, 2018



Retail Goods and Services Expenditures

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

- (1) Apparel Products and Services** includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.
- (2) Membership Fees for Clubs** includes membership fees for social, recreational, and civic clubs.
- (3) Audio** includes satellite radio service, sound components and systems, digital audio players, records, CDs, audio tapes, streaming/downloaded audio, tape recorders, radios, musical instruments and accessories, and rental and repair of musical instruments.
- (4) Toys and Games** includes toys, games, arts and crafts, tricycles, playground equipment, arcade games, and online entertainment and games.
- (5) Recreational Vehicles & Fees** includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.
- (6) Sports/Recreation/Exercise Equipment** includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.
- (7) Photo Equipment and Supplies** includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.
- (8) Reading** includes digital book readers, books, magazine and newspaper subscriptions, and single copies of magazines and newspapers..
- (9) Catered Affairs** includes expenses associated with live entertainment and rental of party supplies.
- (10) Snacks and Other Food at Home** includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.
- (11) Mortgage Payment and Basics** includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.
- (12) Maintenance and Remodeling Materials** includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, and insulation materials for owned homes.
- (13) Household Textiles** includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.
- (14) Major Appliances** includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.
- (15) Housewares** includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.
- (16) Lawn and Garden** includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.
- (17) Housekeeping Supplies** includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrap supplies, postage, and delivery services.
- (18) Personal Care Products** includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, adult diapers, and personal care appliances.
- (19) School Books and Supplies** includes school books and supplies for College, Elementary school, High school, Vocational/Technical School, Preschool/Other Schools, and Other School Supplies.

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.

Source: Esri forecasts for 2017 and 2022; Consumer Spending data are derived from the 2014 and 2015 Consumer Expenditure Surveys, Bureau of Labor Statistics.

May 11, 2018



Retail MarketPlace Profile

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

Summary Demographics

2017 Population	9,084
2017 Households	3,601
2017 Median Disposable Income	\$40,137
2017 Per Capita Income	\$26,167

Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$109,520,259	\$91,514,013	\$18,006,246	9.0	34
Total Retail Trade	44-45	\$99,269,339	\$88,282,196	\$10,987,143	5.9	25
Total Food & Drink	722	\$10,250,920	\$3,231,817	\$7,019,103	52.1	9

Industry Group

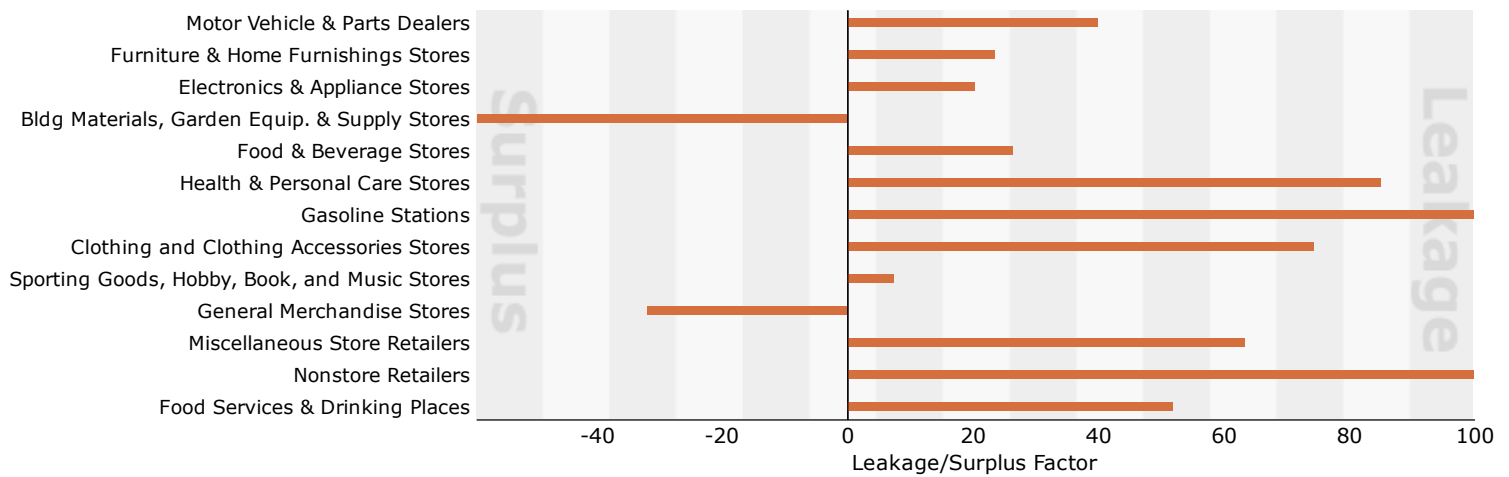
	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$21,626,812	\$9,261,323	\$12,365,489	40.0	4
Automobile Dealers	4411	\$16,842,311	\$8,026,798	\$8,815,513	35.4	3
Other Motor Vehicle Dealers	4412	\$3,097,712	\$0	\$3,097,712	100.0	0
Auto Parts, Accessories & Tire Stores	4413	\$1,686,789	\$1,234,525	\$452,264	15.5	1
Furniture & Home Furnishings Stores	442	\$3,227,578	\$1,995,403	\$1,232,175	23.6	1
Furniture Stores	4421	\$1,739,613	\$0	\$1,739,613	100.0	0
Home Furnishings Stores	4422	\$1,487,965	\$1,995,403	-\$507,438	-14.6	1
Electronics & Appliance Stores	443	\$3,459,746	\$2,287,624	\$1,172,122	20.4	3
Bldg Materials, Garden Equip. & Supply Stores	444	\$6,083,151	\$23,841,866	-\$17,758,715	-59.3	3
Bldg Material & Supplies Dealers	4441	\$5,452,227	\$18,720,264	-\$13,268,037	-54.9	1
Lawn & Garden Equip & Supply Stores	4442	\$630,924	\$5,121,602	-\$4,490,678	-78.1	2
Food & Beverage Stores	445	\$16,549,704	\$9,626,109	\$6,923,595	26.5	1
Grocery Stores	4451	\$14,410,365	\$9,626,109	\$4,784,256	19.9	1
Specialty Food Stores	4452	\$1,563,217	\$0	\$1,563,217	100.0	0
Beer, Wine & Liquor Stores	4453	\$576,122	\$0	\$576,122	100.0	0
Health & Personal Care Stores	446,4461	\$7,010,637	\$563,092	\$6,447,545	85.1	2
Gasoline Stations	447,4471	\$8,237,770	\$0	\$8,237,770	100.0	0
Clothing & Clothing Accessories Stores	448	\$5,296,205	\$773,581	\$4,522,624	74.5	1
Clothing Stores	4481	\$3,596,813	\$773,581	\$2,823,232	64.6	1
Shoe Stores	4482	\$579,689	\$0	\$579,689	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$1,119,703	\$0	\$1,119,703	100.0	0
Sporting Goods, Hobby, Book & Music Stores	451	\$3,406,896	\$2,930,503	\$476,393	7.5	6
Sporting Goods/Hobby/Musical Instr Stores	4511	\$2,989,815	\$707,324	\$2,282,491	61.7	2
Book, Periodical & Music Stores	4512	\$417,081	\$2,223,179	-\$1,806,098	-68.4	4
General Merchandise Stores	452	\$18,480,772	\$36,014,846	-\$17,534,074	-32.2	1
Department Stores Excluding Leased Depts.	4521	\$11,654,541	\$36,014,846	-\$24,360,305	-51.1	1
Other General Merchandise Stores	4529	\$6,826,231	\$0	\$6,826,231	100.0	0
Miscellaneous Store Retailers	453	\$4,403,910	\$987,849	\$3,416,061	63.4	3
Florists	4531	\$217,543	\$0	\$217,543	100.0	0
Office Supplies, Stationery & Gift Stores	4532	\$782,368	\$0	\$782,368	100.0	0
Used Merchandise Stores	4533	\$543,653	\$0	\$543,653	100.0	0
Other Miscellaneous Store Retailers	4539	\$2,860,346	\$987,849	\$1,872,497	48.7	3
Nonstore Retailers	454	\$1,486,158	\$0	\$1,486,158	100.0	0
Electronic Shopping & Mail-Order Houses	4541	\$1,131,942	\$0	\$1,131,942	100.0	0
Vending Machine Operators	4542	\$49,219	\$0	\$49,219	100.0	0
Direct Selling Establishments	4543	\$304,997	\$0	\$304,997	100.0	0
Food Services & Drinking Places	722	\$10,250,920	\$3,231,817	\$7,019,103	52.1	9
Special Food Services	7223	\$174,481	\$63,970	\$110,511	46.3	1
Drinking Places - Alcoholic Beverages	7224	\$297,375	\$0	\$297,375	100.0	0
Restaurants/Other Eating Places	7225	\$9,779,064	\$3,167,847	\$6,611,217	51.1	8

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

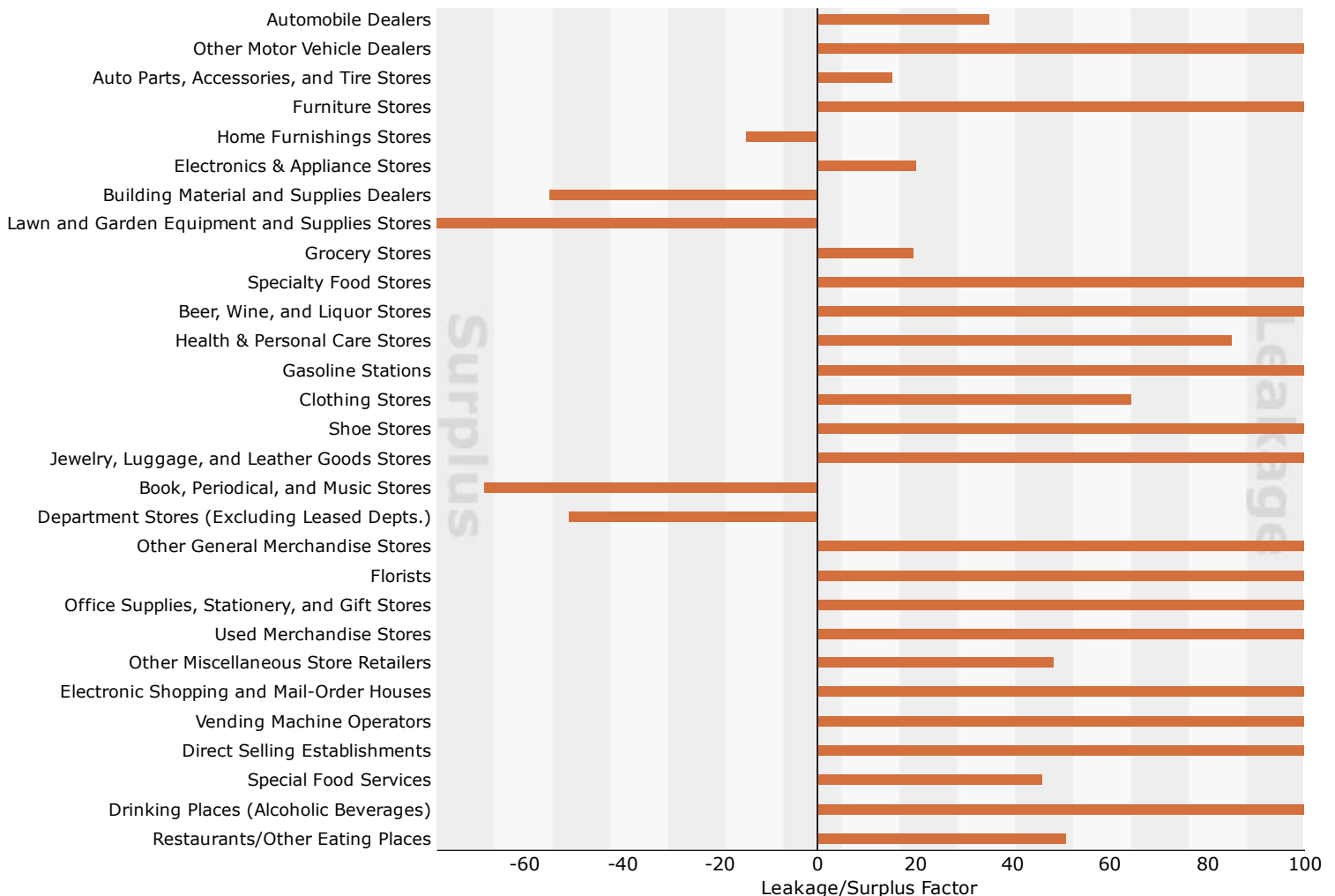
Source: Esri and Infogroup. Retail MarketPlace 2017. Copyright 2017 Infogroup, Inc. All rights reserved.

May 11, 2018

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group





Retail Market Potential

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

Demographic Summary		2017	2022
Population		9,084	9,294
Population 18+		7,446	7,627
Households		3,601	3,680
Median Household Income		\$48,082	\$52,280

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent of Adults/HHs	MPI
Apparel (Adults)			
Bought any men's clothing in last 12 months	3,554	47.7%	100
Bought any women's clothing in last 12 months	3,238	43.5%	100
Bought clothing for child <13 years in last 6 months	1,787	24.0%	87
Bought any shoes in last 12 months	3,995	53.7%	100
Bought costume jewelry in last 12 months	1,376	18.5%	97
Bought any fine jewelry in last 12 months	1,202	16.1%	89
Bought a watch in last 12 months	977	13.1%	86
Automobiles (Households)			
HH owns/leases any vehicle	3,040	84.4%	99
HH bought/leased new vehicle last 12 mo	268	7.4%	75
Automotive Aftermarket (Adults)			
Bought gasoline in last 6 months	6,310	84.7%	100
Bought/changed motor oil in last 12 months	3,612	48.5%	100
Had tune-up in last 12 months	2,013	27.0%	94
Beverages (Adults)			
Drank bottled water/seltzer in last 6 months	4,735	63.6%	96
Drank regular cola in last 6 months	3,124	42.0%	95
Drank beer/ale in last 6 months	3,044	40.9%	97
Cameras (Adults)			
Own digital point & shoot camera/camcorder	1,627	21.9%	103
Own digital SLR camera/camcorder	567	7.6%	91
Printed digital photos in last 12 months	913	12.3%	88
Cell Phones (Adults/Households)			
Bought cell phone in last 12 months	2,754	37.0%	102
Have a smartphone	4,577	61.5%	92
Have a smartphone: Android phone (any brand)	2,307	31.0%	97
Have a smartphone: Apple iPhone	2,013	27.0%	88
Number of cell phones in household: 1	1,434	39.8%	124
Number of cell phones in household: 2	1,297	36.0%	96
Number of cell phones in household: 3+	618	17.2%	66
HH has cell phone only (no landline telephone)	1,807	50.2%	111
Computers (Households)			
HH owns a computer	2,640	73.3%	96
HH owns desktop computer	1,440	40.0%	94
HH owns laptop/notebook	1,897	52.7%	95
HH owns any Apple/Mac brand computer	423	11.7%	76
HH owns any PC/non-Apple brand computer	2,358	65.5%	99
HH purchased most recent computer in a store	1,281	35.6%	95
HH purchased most recent computer online	493	13.7%	105
Spent <\$500 on most recent home computer	639	17.7%	116
Spent \$500-\$999 on most recent home computer	623	17.3%	95
Spent \$1,000-\$1,499 on most recent home computer	285	7.9%	87
Spent \$1,500-\$1,999 on most recent home computer	92	2.6%	60
Spent \$2,000+ on most recent home computer	100	2.8%	78

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 2017 and 2022.

May 11, 2018



Retail Market Potential

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent of Adults/HHs	MPI
Convenience Stores (Adults)			
Shopped at convenience store in last 6 mos	3,635	48.8%	98
Bought brewed coffee at convenience store in last 30 days	1,078	14.5%	93
Bought cigarettes at convenience store in last 30 days	1,061	14.2%	118
Bought gas at convenience store in last 30 days	2,798	37.6%	111
Spent at convenience store in last 30 days: <\$20	601	8.1%	103
Spent at convenience store in last 30 days: \$20-\$39	658	8.8%	97
Spent at convenience store in last 30 days: \$40-\$50	624	8.4%	111
Spent at convenience store in last 30 days: \$51-\$99	410	5.5%	118
Spent at convenience store in last 30 days: \$100+	1,863	25.0%	107
Entertainment (Adults)			
Attended a movie in last 6 months	4,282	57.5%	97
Went to live theater in last 12 months	1,062	14.3%	110
Went to a bar/night club in last 12 months	1,345	18.1%	108
Dined out in last 12 months	3,472	46.6%	103
Gambled at a casino in last 12 months	867	11.6%	84
Visited a theme park in last 12 months	1,169	15.7%	88
Viewed movie (video-on-demand) in last 30 days	1,077	14.5%	79
Viewed TV show (video-on-demand) in last 30 days	747	10.0%	76
Watched any pay-per-view TV in last 12 months	621	8.3%	67
Downloaded a movie over the Internet in last 30 days	611	8.2%	99
Downloaded any individual song in last 6 months	1,543	20.7%	98
Watched a movie online in the last 30 days	1,620	21.8%	116
Watched a TV program online in last 30 days	1,612	21.6%	128
Played a video/electronic game (console) in last 12 months	890	12.0%	121
Played a video/electronic game (portable) in last 12 months	367	4.9%	110
Financial (Adults)			
Have home mortgage (1st)	1,813	24.3%	80
Used ATM/cash machine in last 12 months	3,611	48.5%	98
Own any stock	488	6.6%	90
Own U.S. savings bond	328	4.4%	86
Own shares in mutual fund (stock)	463	6.2%	85
Own shares in mutual fund (bonds)	389	5.2%	104
Have interest checking account	1,894	25.4%	94
Have non-interest checking account	2,475	33.2%	113
Have savings account	4,205	56.5%	104
Have 401K retirement savings plan	949	12.7%	87
Own/used any credit/debit card in last 12 months	5,622	75.5%	100
Avg monthly credit card expenditures: <\$111	978	13.1%	109
Avg monthly credit card expenditures: \$111-\$225	506	6.8%	96
Avg monthly credit card expenditures: \$226-\$450	454	6.1%	93
Avg monthly credit card expenditures: \$451-\$700	364	4.9%	92
Avg monthly credit card expenditures: \$701-\$1,000	313	4.2%	91
Avg monthly credit card expenditures: \$1,001+	478	6.4%	69
Did banking online in last 12 months	2,715	36.5%	100
Did banking on mobile device in last 12 months	1,329	17.8%	103
Paid bills online in last 12 months	3,269	43.9%	98

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 2017 and 2022.

May 11, 2018



Retail Market Potential

College Place City, WA
College Place City, WA (5313855)
Geography: Place

Prepared by Esri

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent of Adults/HHs	MPI
Grocery (Adults)			
Used beef (fresh/frozen) in last 6 months	2,520	70.0%	101
Used bread in last 6 months	3,389	94.1%	100
Used chicken (fresh or frozen) in last 6 months	2,465	68.5%	99
Used turkey (fresh or frozen) in last 6 months	563	15.6%	99
Used fish/seafood (fresh or frozen) in last 6 months	1,899	52.7%	97
Used fresh fruit/vegetables in last 6 months	3,123	86.7%	100
Used fresh milk in last 6 months	3,171	88.1%	101
Used organic food in last 6 months	629	17.5%	85
Health (Adults)			
Exercise at home 2+ times per week	2,340	31.4%	109
Exercise at club 2+ times per week	885	11.9%	89
Visited a doctor in last 12 months	5,592	75.1%	99
Used vitamin/dietary supplement in last 6 months	4,027	54.1%	103
Home (Households)			
Any home improvement in last 12 months	908	25.2%	93
Used housekeeper/maid/professional HH cleaning service in last 12	450	12.5%	94
Purchased low ticket HH furnishings in last 12 months	574	15.9%	98
Purchased big ticket HH furnishings in last 12 months	707	19.6%	92
Bought any small kitchen appliance in last 12 months	799	22.2%	100
Bought any large kitchen appliance in last 12 months	396	11.0%	87
Insurance (Adults/Households)			
Currently carry life insurance	3,073	41.3%	95
Carry medical/hospital/accident insurance	5,205	69.9%	101
Carry homeowner insurance	3,244	43.6%	93
Carry renter's insurance	760	10.2%	117
Have auto insurance: 1 vehicle in household covered	1,312	36.4%	117
Have auto insurance: 2 vehicles in household covered	900	25.0%	88
Have auto insurance: 3+ vehicles in household covered	625	17.4%	80
Pets (Households)			
Household owns any pet	1,800	50.0%	92
Household owns any cat	842	23.4%	104
Household owns any dog	1,218	33.8%	82
Psychographics (Adults)			
Buying American is important to me	3,330	44.7%	108
Usually buy items on credit rather than wait	883	11.9%	97
Usually buy based on quality - not price	1,175	15.8%	86
Price is usually more important than brand name	2,081	27.9%	105
Usually use coupons for brands I buy often	1,469	19.7%	108
Am interested in how to help the environment	955	12.8%	78
Usually pay more for environ safe product	1,008	13.5%	101
Usually value green products over convenience	794	10.7%	98
Likely to buy a brand that supports a charity	2,695	36.2%	103
Reading (Adults)			
Bought digital book in last 12 months	1,036	13.9%	98
Bought hardcover book in last 12 months	1,672	22.5%	109
Bought paperback book in last 12 month	2,314	31.1%	104
Read any daily newspaper (paper version)	2,058	27.6%	114
Read any digital newspaper in last 30 days	2,576	34.6%	102
Read any magazine (paper/electronic version) in last 6 months	6,756	90.7%	100

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Restaurants (Adults)			
Went to family restaurant/steak house in last 6 months	5,523	74.2%	99
Went to family restaurant/steak house: 4+ times a month	1,961	26.3%	96
Went to fast food/drive-in restaurant in last 6 months	6,857	92.1%	102
Went to fast food/drive-in restaurant 9+ times/mo	2,800	37.6%	96
Fast food/drive-in last 6 months: eat in	2,820	37.9%	104
Fast food/drive-in last 6 months: home delivery	545	7.3%	95
Fast food/drive-in last 6 months: take-out/drive-thru	3,647	49.0%	106
Fast food/drive-in last 6 months: take-out/walk-in	1,609	21.6%	107
Television & Electronics (Adults/Households)			
Own any tablet	2,245	30.2%	89
Own any e-reader	593	8.0%	92
Own e-reader/tablet: iPad	1,248	16.8%	81
HH has Internet connectable TV	632	17.6%	87
Own any portable MP3 player	1,954	26.2%	94
HH owns 1 TV	803	22.3%	108
HH owns 2 TVs	1,001	27.8%	107
HH owns 3 TVs	694	19.3%	89
HH owns 4+ TVs	581	16.1%	88
HH subscribes to cable TV	1,916	53.2%	111
HH subscribes to fiber optic	123	3.4%	43
HH owns portable GPS navigation device	862	23.9%	88
HH purchased video game system in last 12 mos	230	6.4%	83
HH owns Internet video device for TV	321	8.9%	81
Travel (Adults)			
Domestic travel in last 12 months	3,687	49.5%	97
Took 3+ domestic non-business trips in last 12 months	832	11.2%	100
Spent on domestic vacations in last 12 months: <\$1,000	915	12.3%	118
Spent on domestic vacations in last 12 months: \$1,000-\$1,499	323	4.3%	76
Spent on domestic vacations in last 12 months: \$1,500-\$1,999	239	3.2%	87
Spent on domestic vacations in last 12 months: \$2,000-\$2,999	293	3.9%	104
Spent on domestic vacations in last 12 months: \$3,000+	302	4.1%	71
Domestic travel in the 12 months: used general travel website	436	5.9%	84
Foreign travel in last 3 years	1,425	19.1%	79
Took 3+ foreign trips by plane in last 3 years	237	3.2%	72
Spent on foreign vacations in last 12 months: <\$1,000	275	3.7%	87
Spent on foreign vacations in last 12 months: \$1,000-\$2,999	240	3.2%	92
Spent on foreign vacations in last 12 months: \$3,000+	230	3.1%	61
Foreign travel in last 3 years: used general travel website	362	4.9%	85
Nights spent in hotel/motel in last 12 months: any	3,134	42.1%	101
Took cruise of more than one day in last 3 years	480	6.4%	81
Member of any frequent flyer program	781	10.5%	64
Member of any hotel rewards program	886	11.9%	80

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