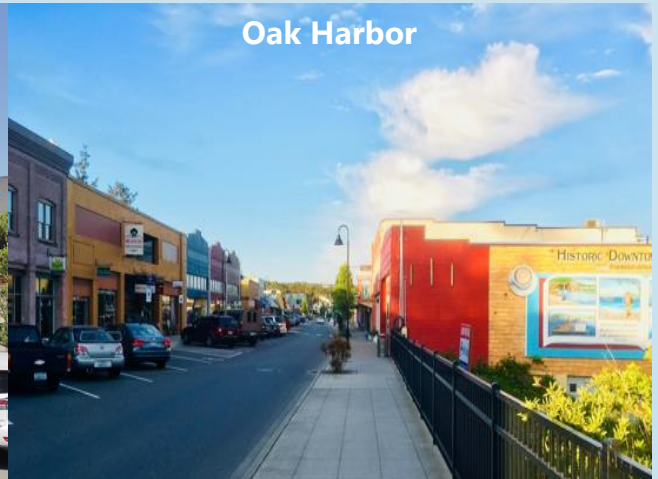


Island County Retail Leakage and Surplus Analysis



November 2020



Economic
Development
Council
for Island County

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OVERVIEW

The **Retail Leakage and Surplus Analysis** examines the quantitative aspect of Island County's retail opportunities. While this is a guide to understanding retail opportunities in the County, it's not an analysis that indicates unconditional opportunities. This type of analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid the County in the following ways:

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

Due to the sources from which much of the data is derived (U.S. Census), this report uses 2018 data, which is the most recent, complete data set available. This is normal because of the time needed to aggregate and consolidate data for a period of time. This data is relevant and allows a baseline from which subsequent years can be compared.

Understanding Retail Leakage

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

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

Understanding Retail Surplus

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

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

OVERVIEW

Interpreting Leakage Index Graphs

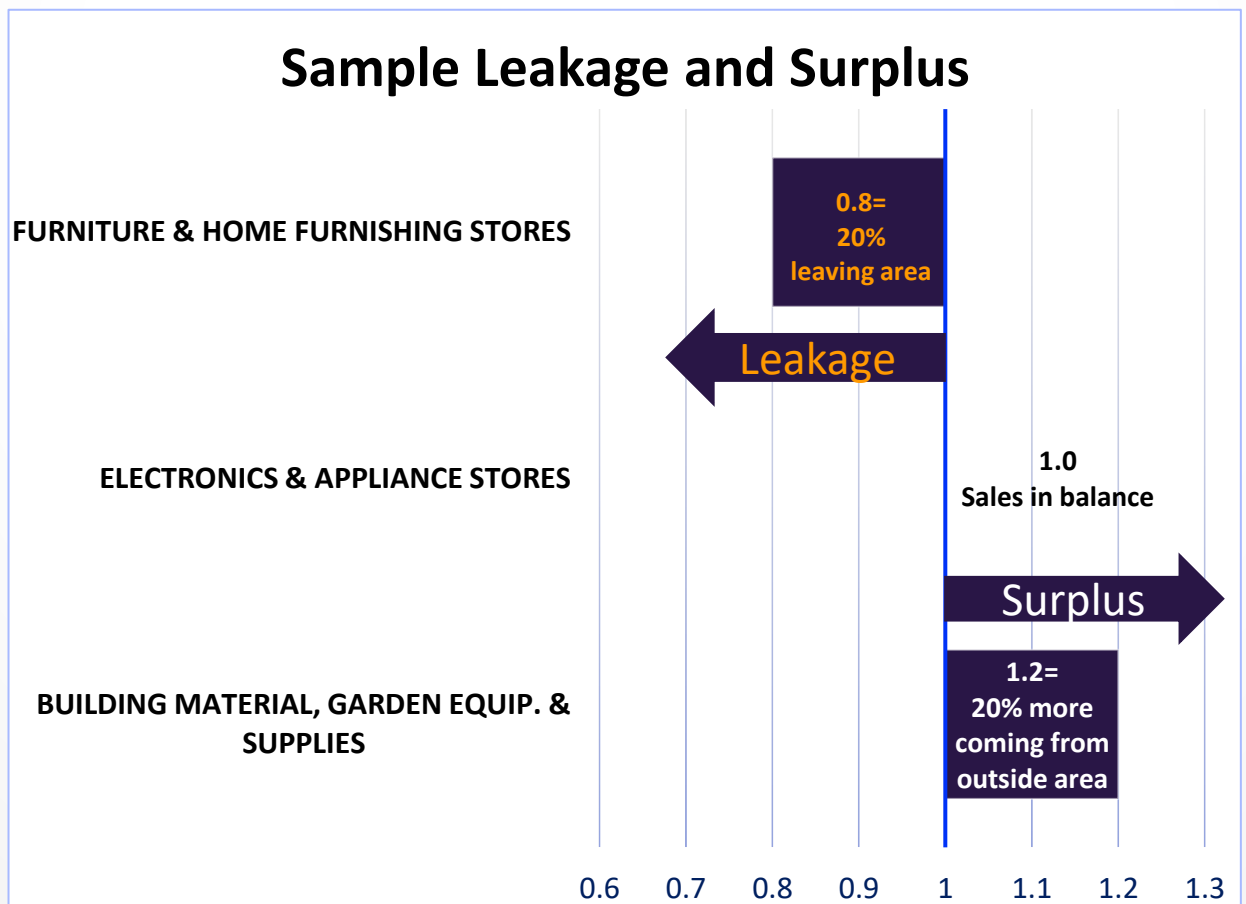
There are three categories that sales for a given area can fall – sales can either be in equilibrium/balance, there can be a leakage, or there can be a surplus. In the graphs through out this report the following is a guide to understanding them.

1.0=equilibrium, meaning that demand and sales in the area being analyzed are in balance.

.80=demand exceeds sales by 20%, meaning that consumers are leaving the area being analyzed.

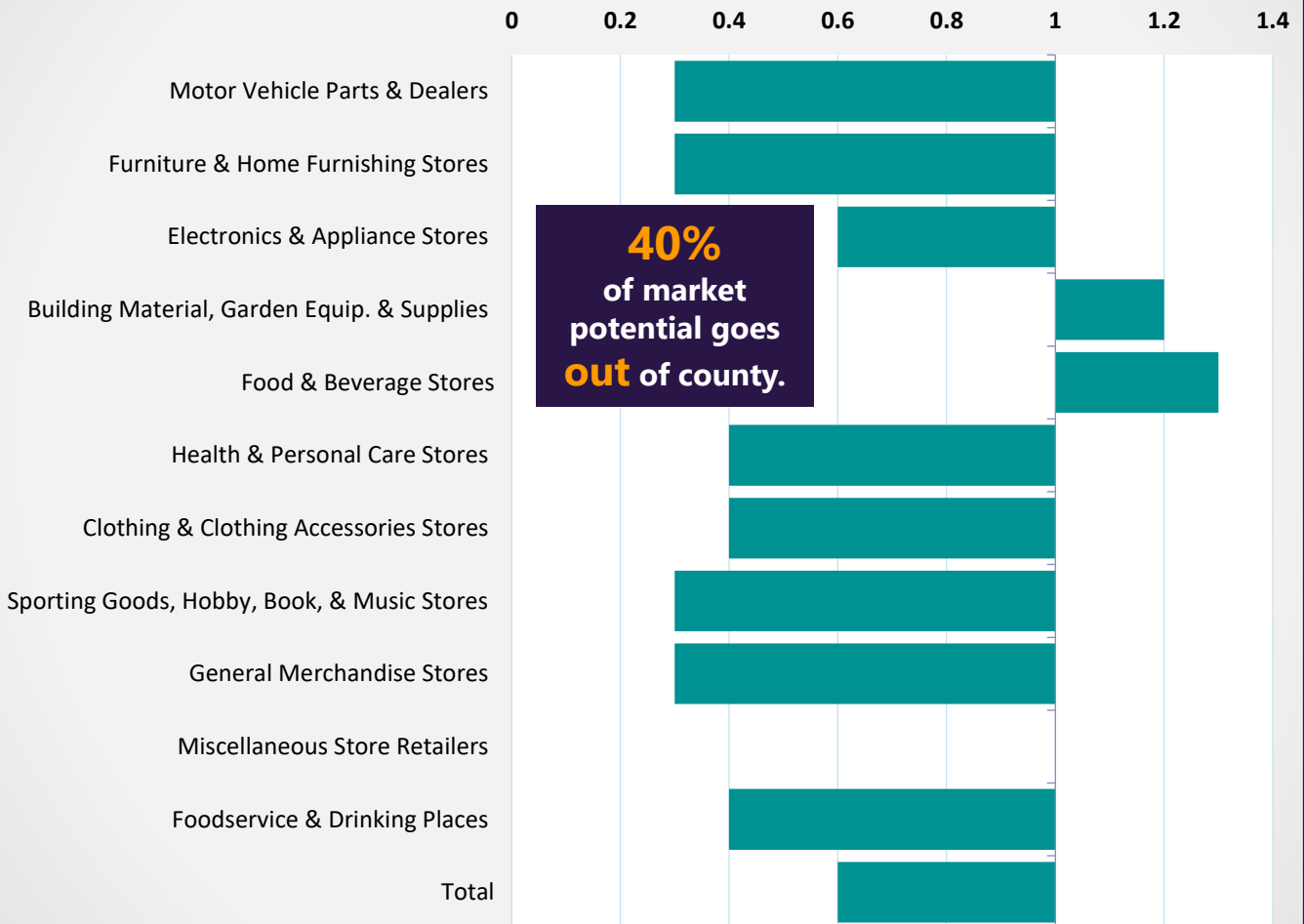
1.2=sales exceed demand by 20%, meaning that consumers are coming from outside the area being analyzed.

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



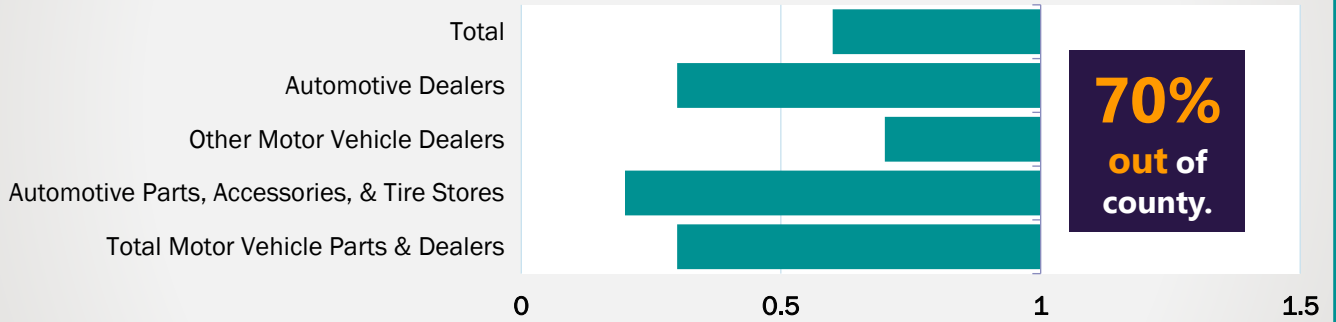
Island County

Leakage or Surplus



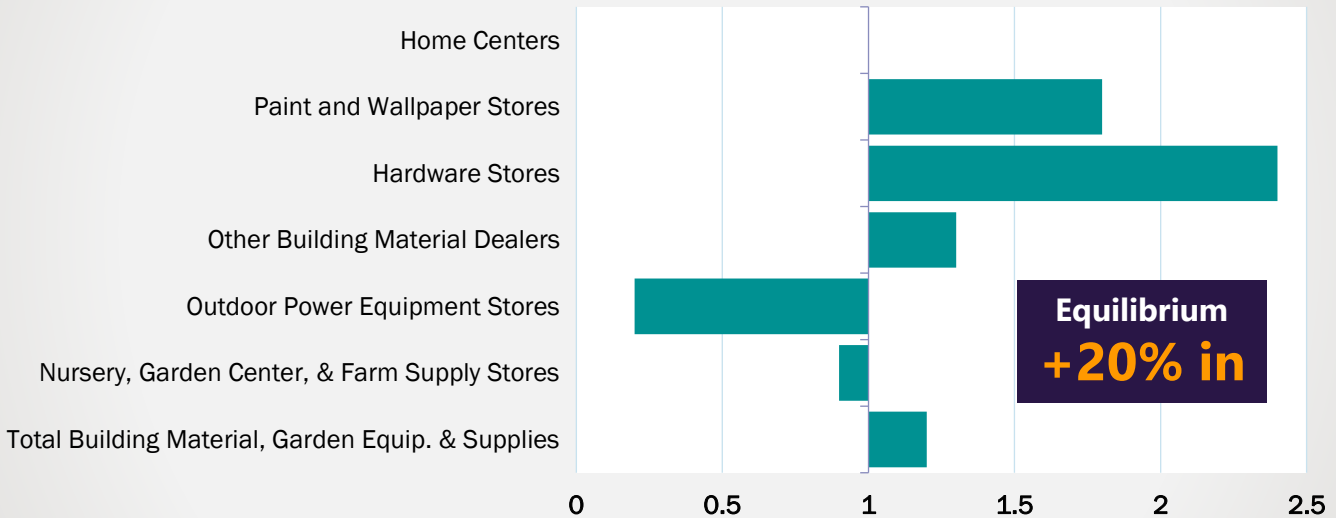
Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	555,604,436	180,572,271	0.3
Furniture & Home Furnishing Stores	39,692,150	13,862,926	0.3
Electronics & Appliance Stores	41,667,077	25,880,265	0.6
Building Material, Garden Equip. & Supplies	132,433,669	159,603,298	1.2
Food & Beverage Stores	280,088,803	351,905,586	1.3
Health & Personal Care Stores	109,191,209	47,251,403	0.4
Clothing & Clothing Accessories Stores	123,712,767	46,279,586	0.4
Sporting Goods, Hobby, Book, & Music Stores	50,492,016	16,226,326	0.3
General Merchandise Stores	279,116,570	94,443,392	0.3
Miscellaneous Store Retailers	51,651,158	52,380,418	1.0
Foodservice & Drinking Places	280,053,023	120,289,052	0.4
Total	1,943,702,879	1,108,694,521	0.6

Motor Vehicle Parts



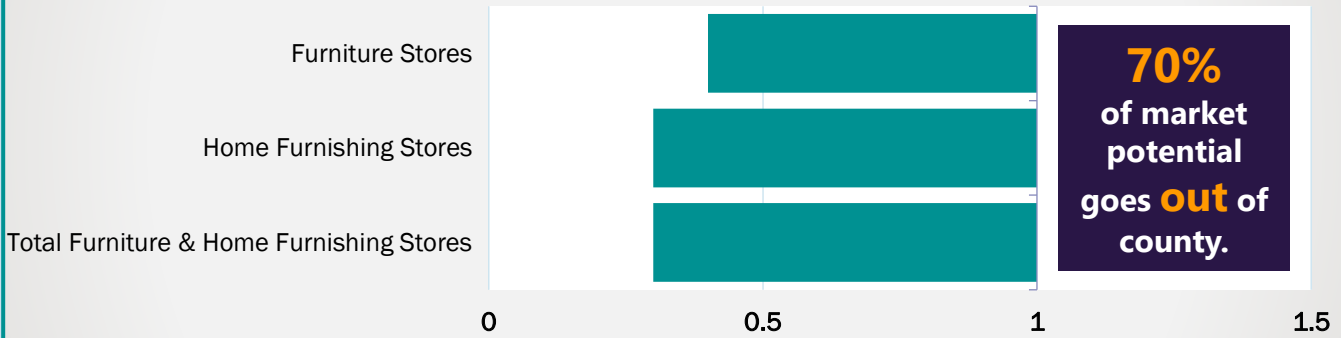
Store Type	Potential	Estimated	Surplus/Leakage
Automotive Dealers	403,724,586	101,030,507	0.3
Other Motor Vehicle Dealers	90,365,693	67,066,227	0.7
Automotive Parts, Accessories, & Tire Stores	61,514,156	12,475,537	0.2
Total Motor Vehicle Parts & Dealers	555,604,436	180,572,271	0.3

Building, Garden, and Supplies



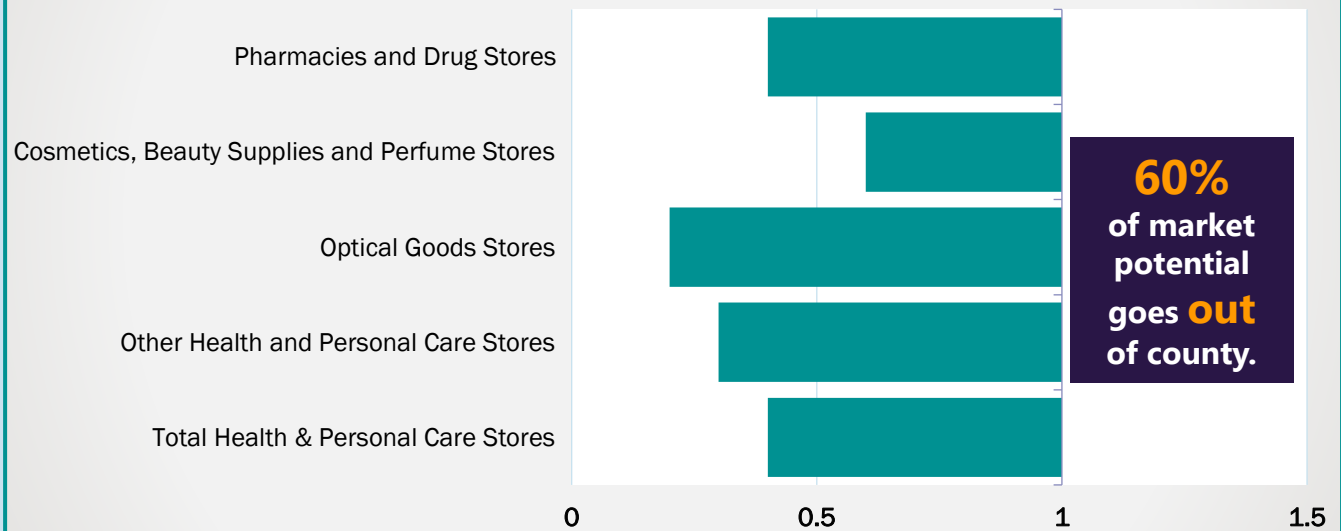
Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	63,117,516	64,715,568	1.0
Paint and Wallpaper Stores	4,152,628	7,650,199	1.8
Hardware Stores	9,622,814	23,339,367	2.4
Other Building Material Dealers	38,223,513	50,788,976	1.3
Outdoor Power Equipment Stores	2,574,283	563,299	0.2
Nursery, Garden Center, & Farm Supply Stores	14,742,913	12,545,889	0.9
Total Building Material, Garden Equip. & Supplies	132,433,669	159,603,298	1.2

Furniture Stores



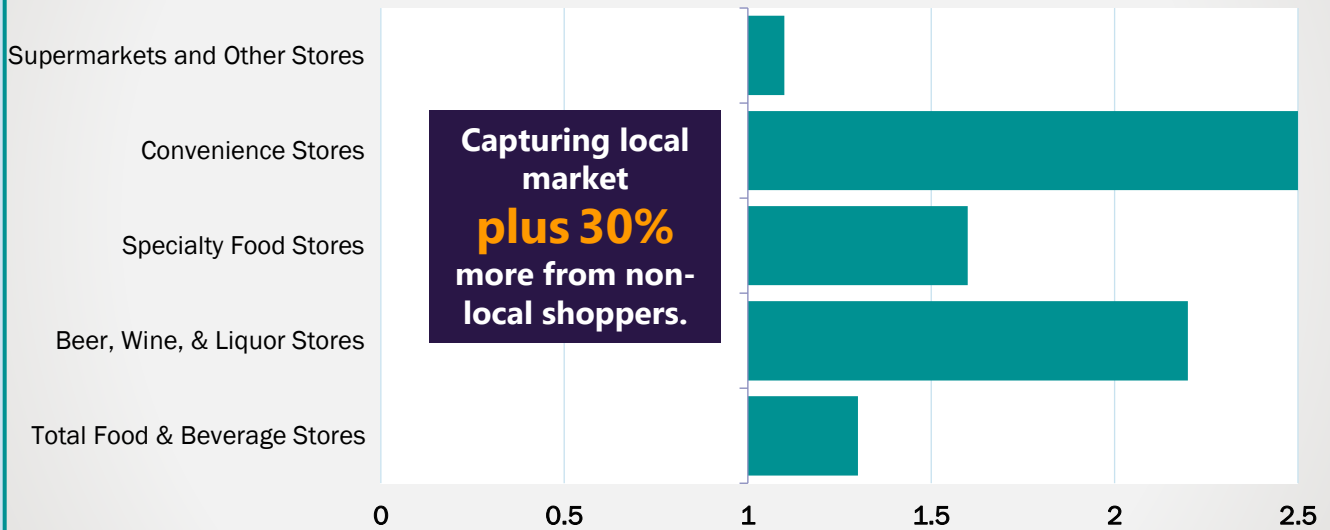
Store Type	Potential	Estimated	Surplus/Leakage
Furniture Stores	19,997,245	8,817,975	0.4
Home Furnishing Stores	19,694,905	5,044,951	0.3
Total Furniture & Home Furnishing Stores	39,692,150	13,862,926	0.3

Health and Personal Care



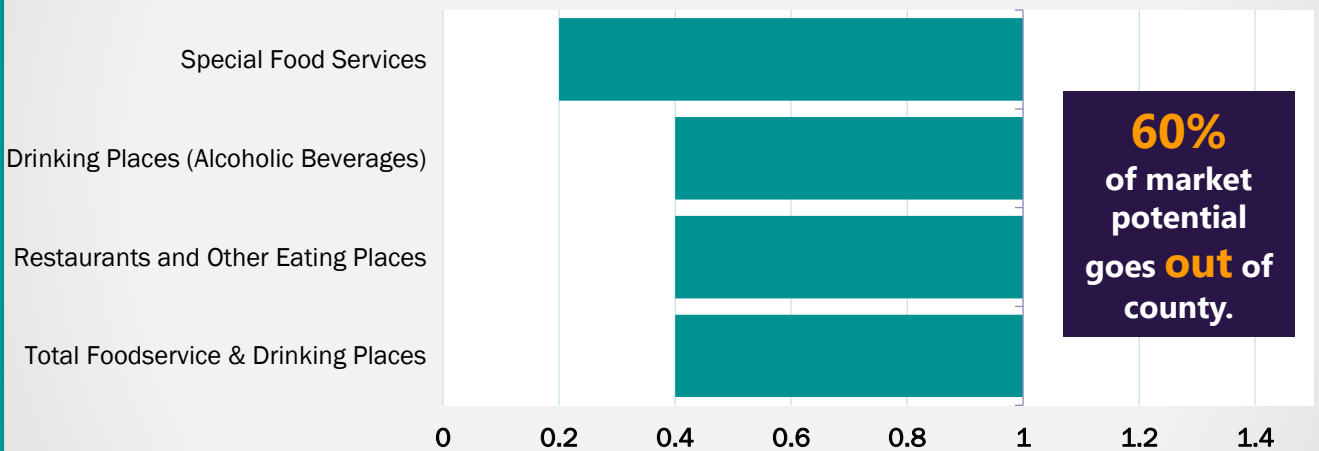
Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	89,625,957	40,038,674	0.4
Cosmetics, Beauty Supplies and Perfume Stores	6,343,769	3,883,663	0.6
Optical Goods Stores	5,953,870	1,463,010	0.2
Other Health and Personal Care Stores	7,267,613	1,866,056	0.3
Total Health & Personal Care Stores	109,191,209	47,251,403	0.4

Grocery



Store Type	Potential	Estimated	Surplus/Leakage
Supermarkets and Other Stores	231,806,063	246,725,713	1.1
Convenience Stores	10,436,605	26,513,011	2.5
Specialty Food Stores	8,888,889	14,207,051	1.6
Beer, Wine, & Liquor Stores	28,957,246	64,459,810	2.2
Total Food & Beverage Stores	280,088,803	351,905,586	1.3

Restaurant



Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	21,569,482	5,242,453	0.2
Drinking Places (Alcoholic Beverages)	13,326,003	5,798,762	0.4
Restaurants and Other Eating Places	245,157,538	109,247,836	0.4
Total Foodservice & Drinking Places	280,053,023	120,289,052	0.4

Clothing and Accessories



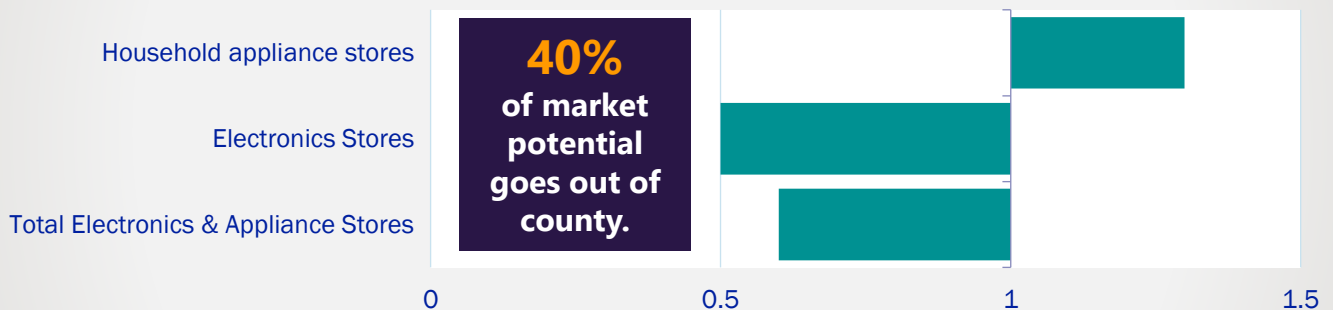
Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	3,137,210	760,569	0.2
Women's Clothing Stores	24,898,799	4,300,156	0.2
Children's and Infants' Clothing Stores	3,860,754	977,960	0.3
Family Clothing Stores	49,609,779	11,560,644	0.2
Clothing Accessories Stores	5,001,857	1,615,123	0.3
Other Clothing Stores	10,163,489	4,831,534	0.5
Shoe Stores	13,066,553	6,379,372	0.5
Jewelry Stores	12,699,562	15,683,691	1.2
Luggage & Leather Goods Stores	1,274,766	170,537	0.1
Total Clothing & Clothing Accessories Stores	123,712,767	46,279,586	0.4

Sporting Goods, Hobby, Books, and Music



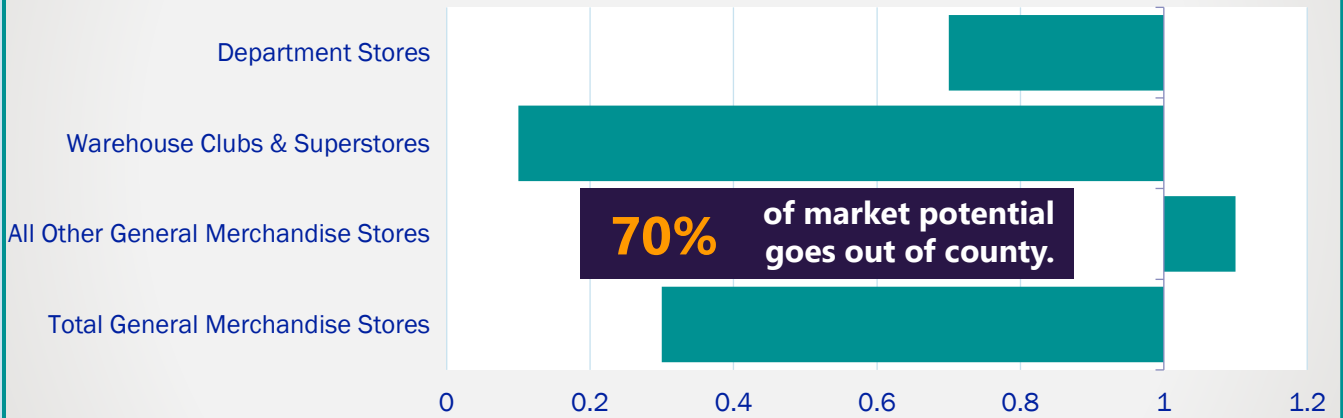
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	36,246,345	3,752,432	0.1
Hobby, Toy, and Game Stores	7,335,452	9,333,899	1.3
Sewing, Needlework, and Piece Goods Stores	1,262,741	1,457,103	1.2
Musical Instrument and Supplies Stores	1,285,443	692,081	0.5
Book Stores	3,286,856	486,415	0.1
News Dealers and Newsstands	1,075,178	504,395	0.5
Total Sporting Goods, Hobby, Book, & Music Stores	50,492,016	16,226,326	0.3

Electronics and Appliances



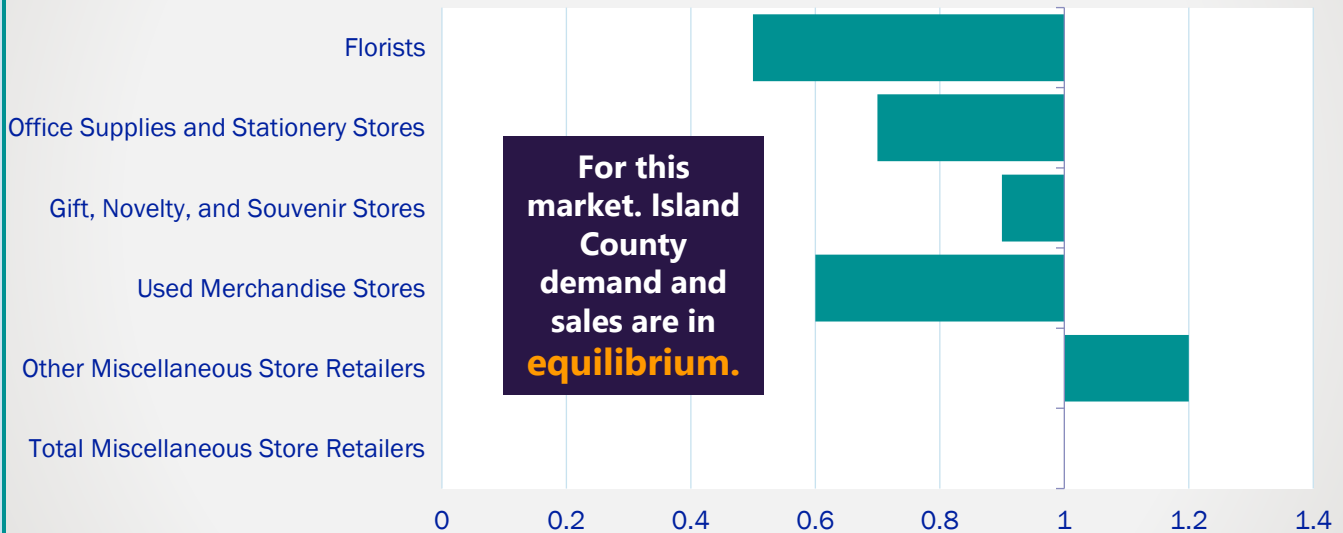
Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	5,662,435	7,237,895	1.3
Electronics Stores	36,004,643	18,642,369	0.5
Total Electronics & Appliance Stores	41,667,077	25,880,265	0.6

General Merchandise



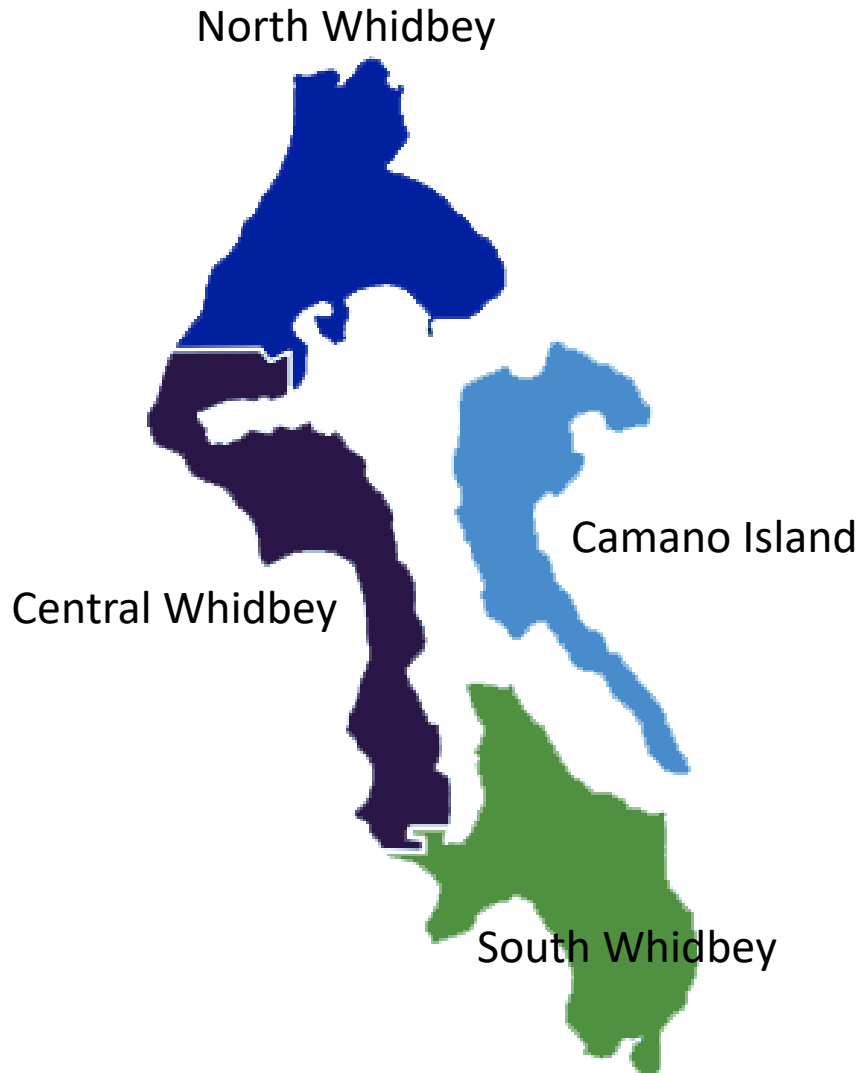
Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	62,473,082	46,555,416	0.7
Warehouse Clubs & Superstores	184,979,285	14,272,256	0.1
All Other General Merchandise Stores	31,664,203	33,615,720	1.1
Total General Merchandise Stores	279,116,570	94,443,392	0.3

Miscellaneous



Store Type	Potential	Estimated	Surplus/Leakage
Florists	2,116,097	1,061,005	0.5
Office Supplies and Stationery Stores	4,167,355	2,760,805	0.7
Gift, Novelty, and Souvenir Stores	6,192,513	5,565,683	0.9
Used Merchandise Stores	6,823,183	3,784,190	0.6
Other Miscellaneous Store Retailers	32,352,010	39,208,735	1.2
Total Miscellaneous Store Retailers	51,651,158	52,380,418	1.0

Leakage and Surplus by CCD



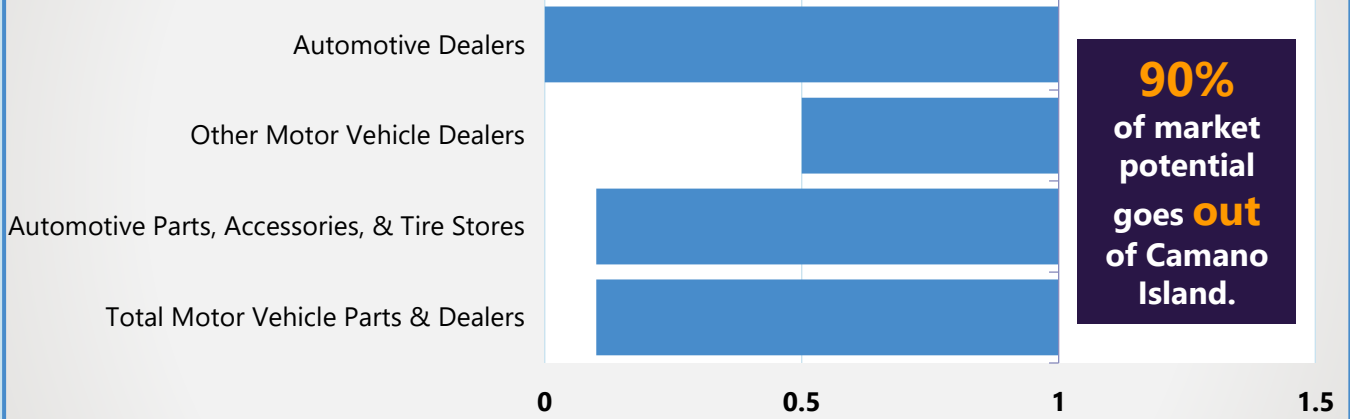
Camano Island

Leakage and Surplus



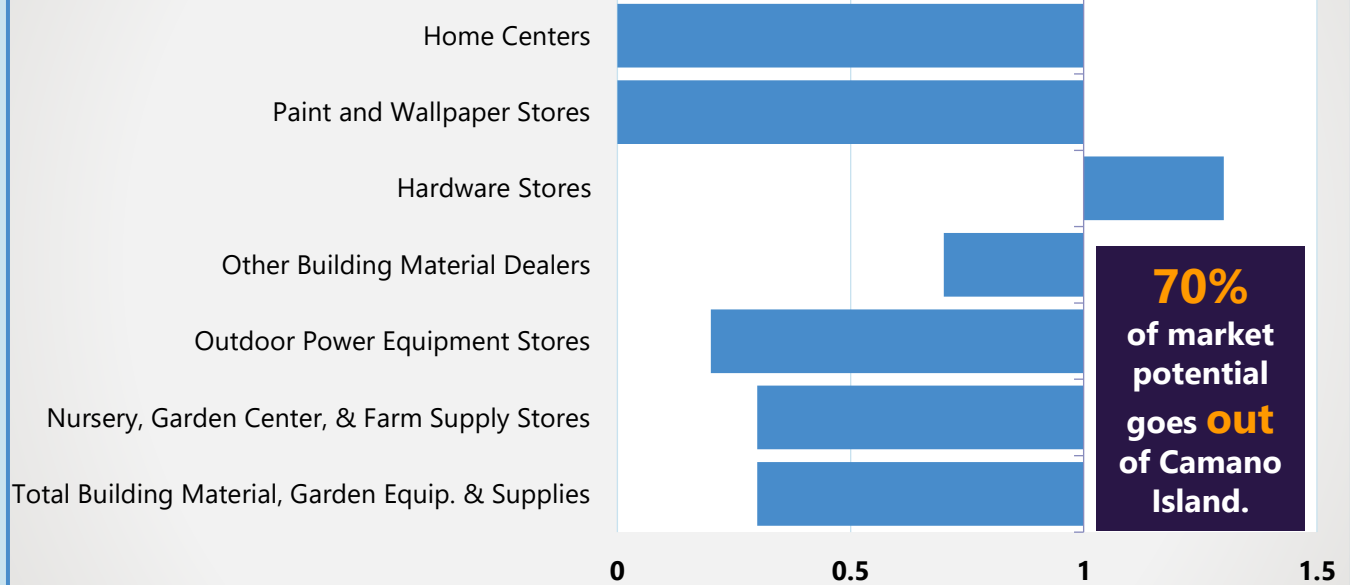
Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	127,961,705	16,550,808	0.1
Furniture & Home Furnishing Stores	8,708,395	1,009,096	0.1
Electronics & Appliance Stores	9,200,645	3,735,773	0.4
Building Material, Garden Equip. & Supplies	31,002,884	9,965,144	0.3
Food & Beverage Stores	61,123,300	23,796,651	0.4
Health & Personal Care Stores	24,675,732	4,018,149	0.2
Clothing & Clothing Accessories Stores	26,407,296	2,444,688	0.1
Sporting Goods, Hobby, Book, & Music Stores	11,838,494	915,479	0.1
General Merchandise Stores	61,439,154	6,633,038	0.1
Miscellaneous Store Retailers	11,832,642	6,138,464	0.5
Foodservice & Drinking Places	59,427,392	7,170,359	0.1
Total	433,617,640	82,377,649	0.2

Vehicles - Camano



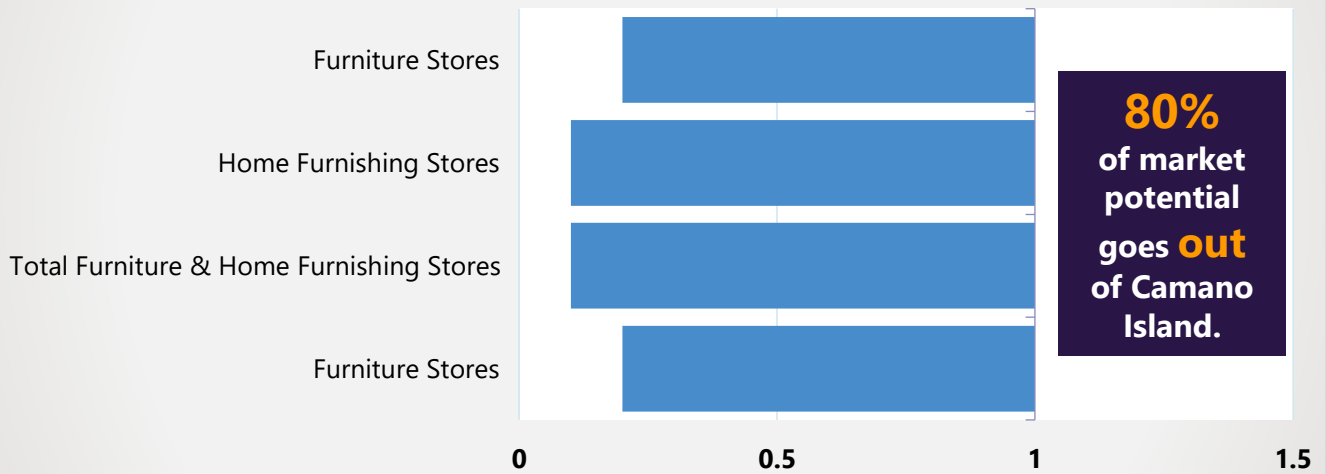
Store Type	Potential	Estimated	Surplus/Leakage
Automotive Dealers	90,447,548	3,556,091	0.0
Other Motor Vehicle Dealers	22,920,514	12,205,997	0.5
Automotive Parts, Accessories, & Tire Stores	14,593,644	788,719	0.1
Total Motor Vehicle Parts & Dealers	127,961,705	16,550,808	0.1

Hardware - Camano

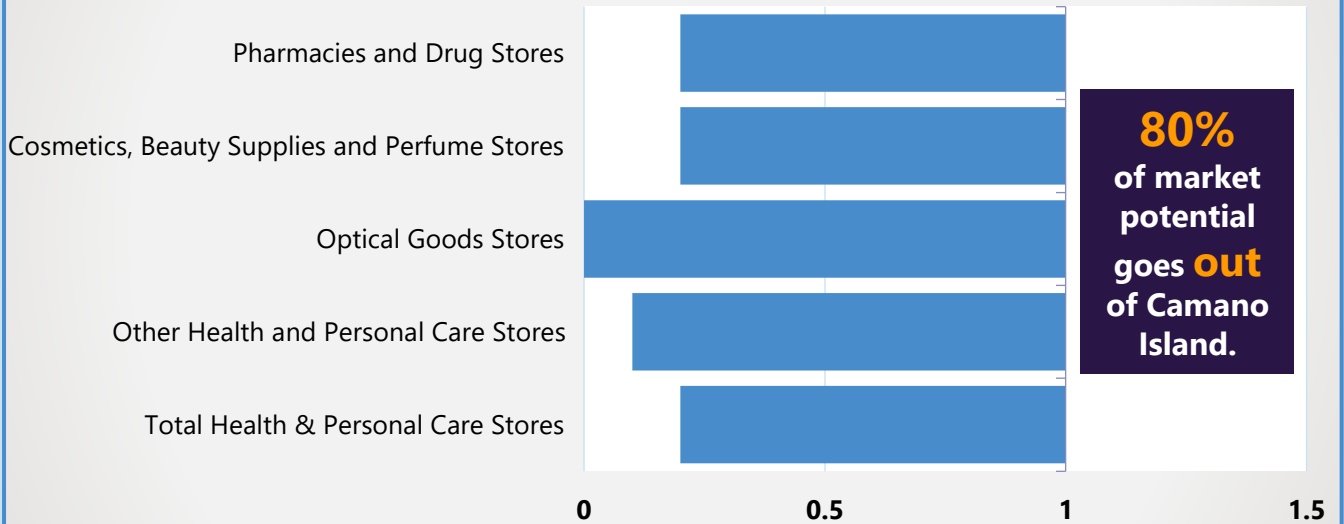


Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	14,705,979	683	0.0
Paint and Wallpaper Stores	986,264	222	0.0
Hardware Stores	2,265,059	2,894,214	1.3
Other Building Material Dealers	8,984,135	6,033,239	0.7
Outdoor Power Equipment Stores	605,524	126,392	0.2
Nursery, Garden Center, & Farm Supply Stores	3,455,924	910,394	0.3
Total Building Material, Garden Equip. & Supplies	31,002,884	9,965,144	0.3

Furniture - Camano

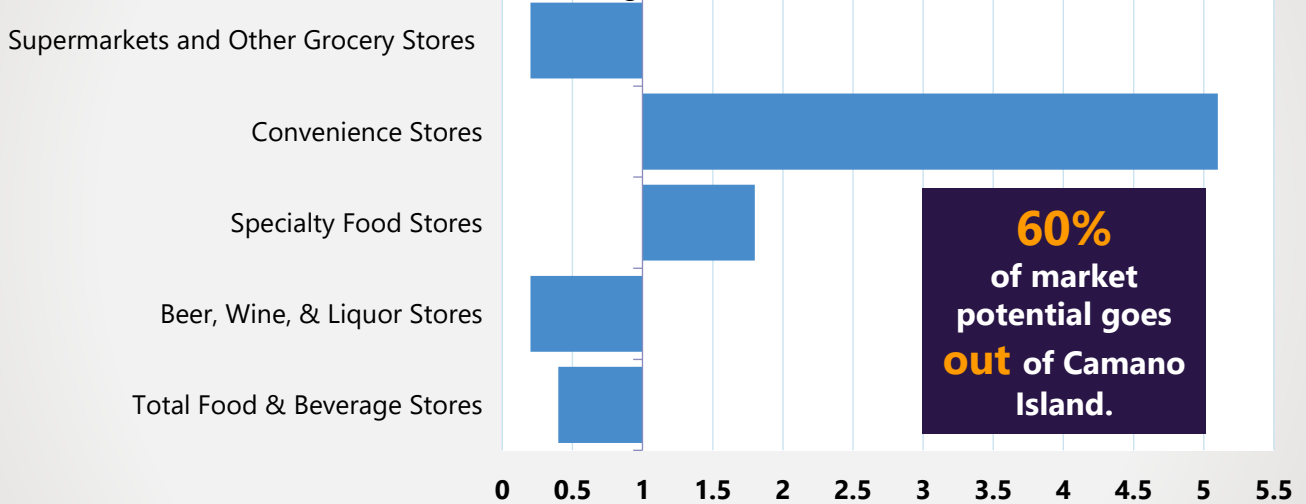


Health - Camano

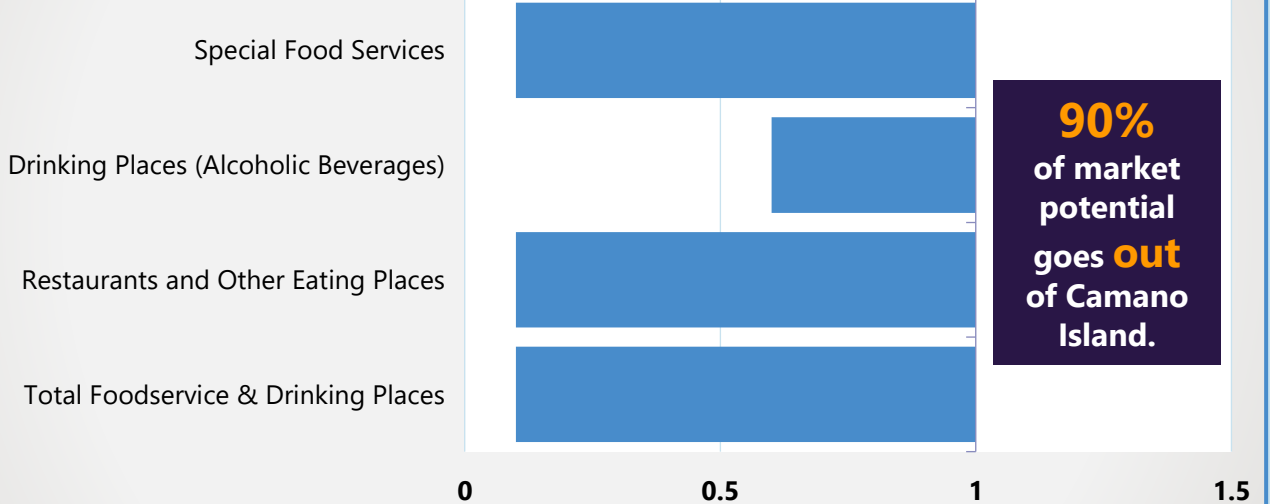


Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	20,176,407	3,635,828	0.2
Cosmetics, Beauty Supplies and Perfume Stores	1,440,921	255,983	0.2
Optical Goods Stores	1,422,516	0	0.0
Other Health and Personal Care Stores	1,635,889	126,338	0.1
Total Health & Personal Care Stores	24,675,732	4,018,149	0.2

Grocery - Camano



Restaurants - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	4,620,805	353,119	0.1
Drinking Places (Alcoholic Beverages)	2,917,214	1,668,675	0.6
Restaurants and Other Eating Places	51,889,374	5,148,565	0.1
Total Foodservice & Drinking Places	59,427,392	7,170,359	0.1

Clothing - Camano



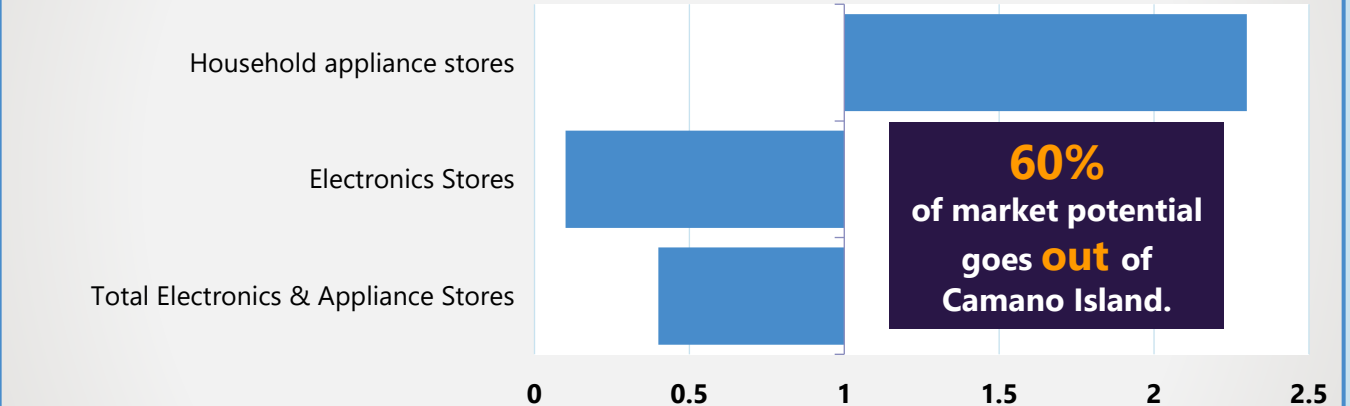
Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	687,345	0	0.0
Women's Clothing Stores	5,365,782	365,040	0.1
Children's and Infants' Clothing Stores	770,873	0	0.0
Family Clothing Stores	10,683,054	399,114	0.0
Clothing Accessories Stores	1,075,435	0	0.0
Other Clothing Stores	2,197,431	158,978	0.1
Shoe Stores	2,811,542	4	0.0
Jewelry Stores	2,533,799	1,505,138	0.6
Luggage & Leather Goods Stores	282,037	16,414	0.1
Total Clothing & Clothing Accessories Stores	26,407,296	2,444,688	0.1

Hobby - Camano



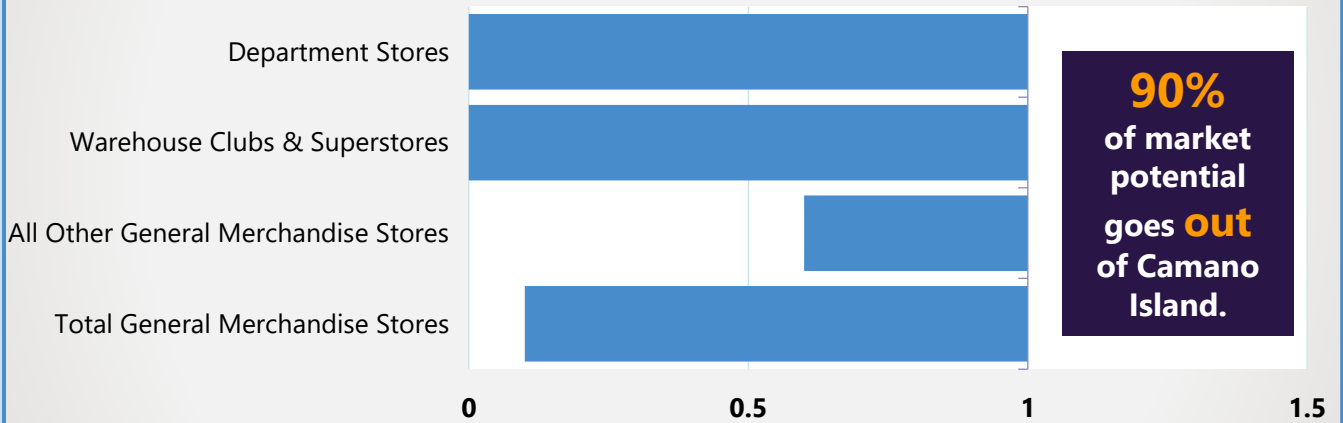
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	8,693,369	243,684	0.0
Hobby, Toy, and Game Stores	1,654,233	401,567	0.2
Sewing, Needlework, and Piece Goods Stores	297,626	135,078	0.5
Musical Instrument and Supplies Stores	279,888	64,138	0.2
Book Stores	679,849	68,206	0.1
News Dealers and Newsstands	233,529	2,806	0.0
Total Sporting Goods, Hobby, Book, & Music Stores	11,838,494	915,479	0.1

Electronics - Camano



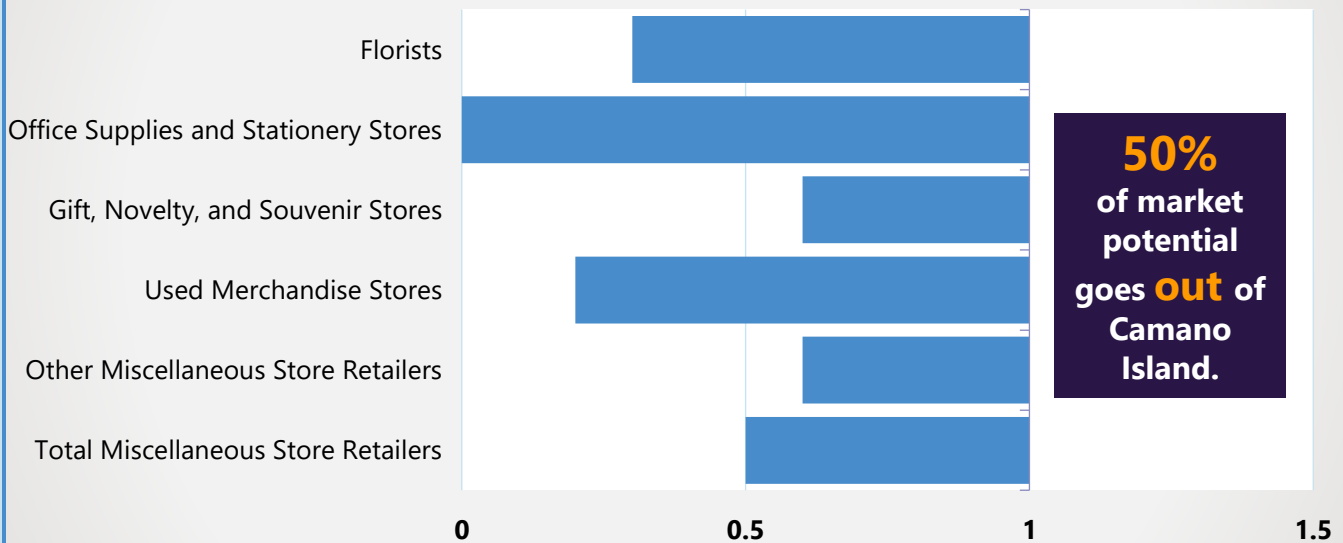
Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	1,251,280	2,886,508	2.3
Electronics Stores	7,949,364	849,266	0.1
Total Electronics & Appliance Stores	9,200,645	3,735,773	0.4

General Merchandise - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	13,679,655	210,631	0.0
Warehouse Clubs & Superstores	40,732,515	1,904,885	0.0
All Other General Merchandise Stores	7,026,984	4,517,523	0.6
Total General Merchandise Stores	61,439,154	6,633,038	0.1

Miscellaneous - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Florists	494,924	132,104	0.3
Office Supplies and Stationery Stores	917,976	4	0.0
Gift, Novelty, and Souvenir Stores	1,369,773	822,330	0.6
Used Merchandise Stores	1,506,577	368,171	0.2
Other Miscellaneous Store Retailers	7,543,393	4,815,855	0.6
Total Miscellaneous Store Retailers	11,832,642	6,138,464	0.5

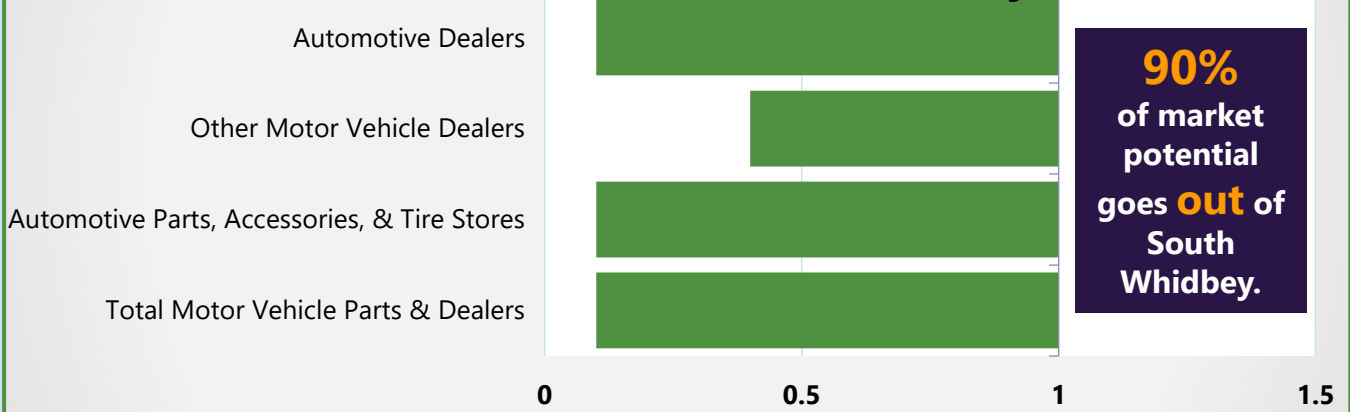
South Whidbey

Leakage and Surplus

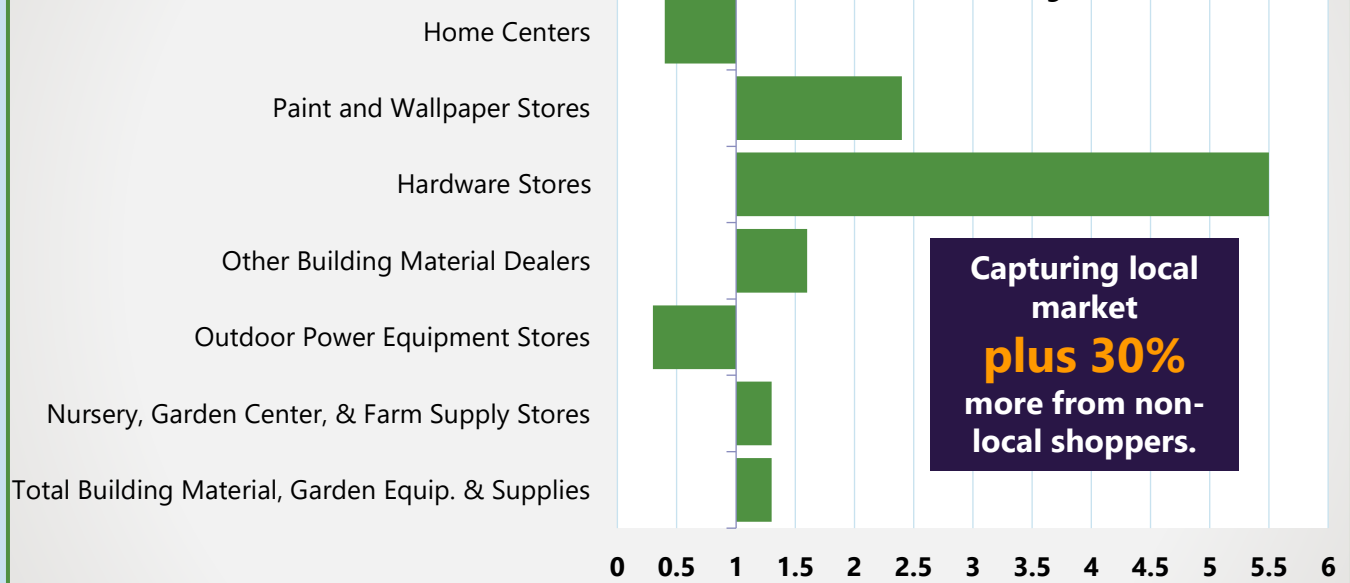


Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	118,544,263	17,773,200	0.1
Furniture & Home Furnishing Stores	7,982,360	4,037,731	0.5
Electronics & Appliance Stores	8,360,608	4,228,880	0.5
Building Material, Garden Equip. & Supplies	28,774,354	36,509,125	1.3
Food & Beverage Stores	55,852,972	146,641,368	2.6
Health & Personal Care Stores	22,564,647	14,578,979	0.6
Clothing & Clothing Accessories Stores	23,884,358	20,784,953	0.9
Sporting Goods, Hobby, Book, & Music Stores	11,161,170	4,542,649	0.4
General Merchandise Stores	56,184,095	6,857,096	0.1
Miscellaneous Store Retailers	10,997,997	16,153,431	1.5
Foodservice & Drinking Places	53,828,485	30,487,654	0.6
Total	398,135,308	302,595,065	0.8

Vehicles – South Whidbey



Hardware – South Whidbey

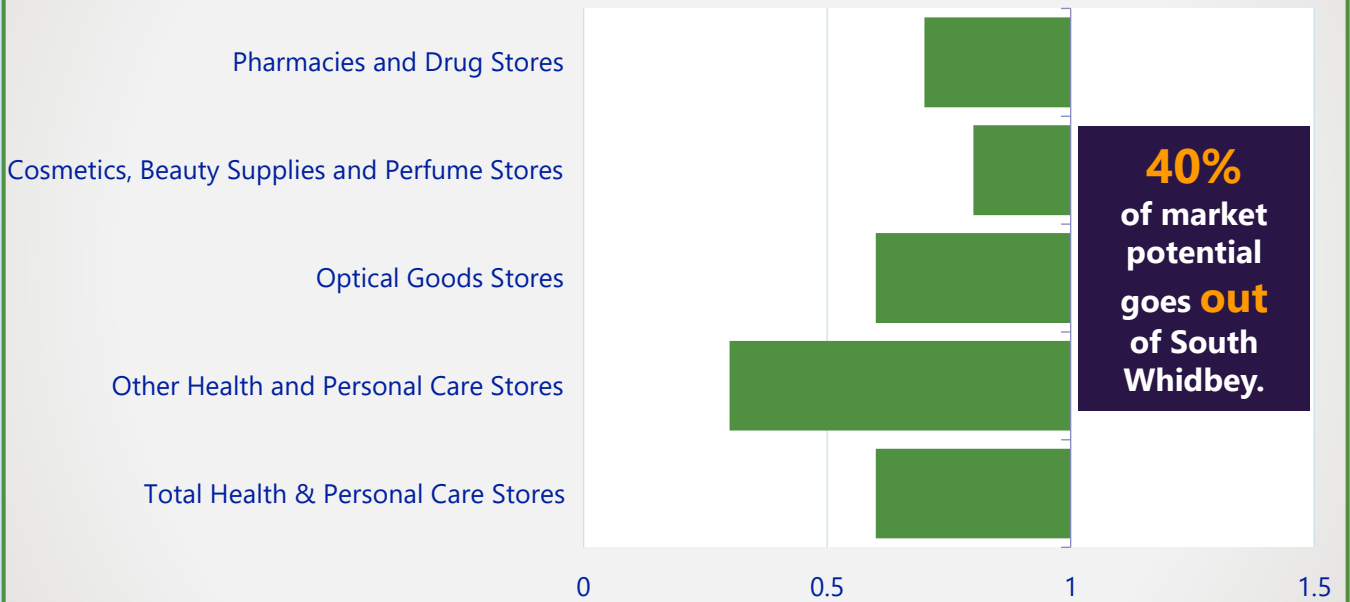


Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	13,636,533	5,291,223	0.4
Paint and Wallpaper Stores	919,789	2,215,145	2.4
Hardware Stores	2,100,260	11,630,852	5.5
Other Building Material Dealers	8,442,925	13,152,275	1.6
Outdoor Power Equipment Stores	546,260	142,565	0.3
Nursery, Garden Center, & Farm Supply Stores	3,128,587	4,077,064	1.3
Total Building Material, Garden Equip. & Supplies	28,774,354	36,509,125	1.3

Furniture – South Whidbey



Health – South Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	18,443,988	12,174,518	0.7
Cosmetics, Beauty Supplies and Perfume Stores	1,314,887	1,080,666	0.8
Optical Goods Stores	1,313,260	852,695	0.6
Other Health and Personal Care Stores	1,492,512	471,100	0.3
Total Health & Personal Care Stores	22,564,647	14,578,979	0.6

Grocery – South Whidbey

Supermarkets and Other Grocery Stores

Convenience Stores

Specialty Food Stores

Beer, Wine, & Liquor Stores

Total Food & Beverage Stores



Capturing local market
plus 160%
more from non-local
shoppers.

Store Type

Potential

Estimated

Surplus/
Leakage

Supermarkets and Other Grocery Stores

45,768,146

83,734,681

1.8

Convenience Stores

2,073,325

3,774,486

1.8

Specialty Food Stores

1,734,806

5,698,829

3.3

Beer, Wine, & Liquor Stores

6,276,694

53,433,372

8.5

Total Food & Beverage Stores

55,852,972

146,641,368

2.6

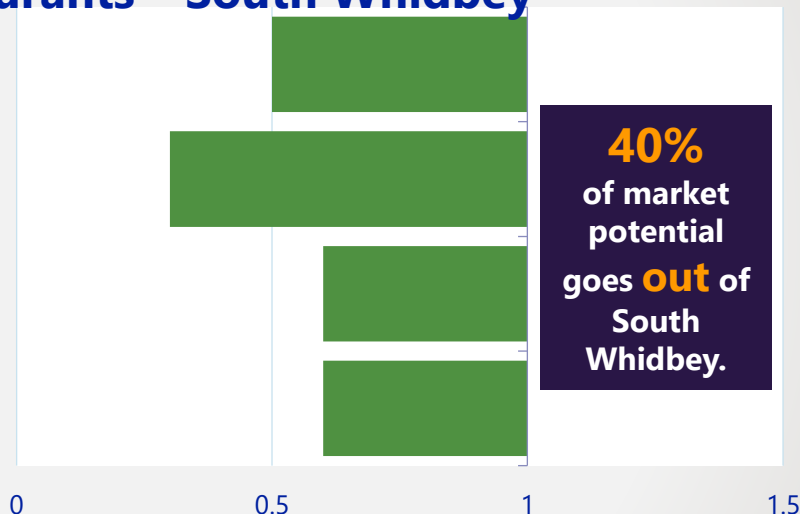
Restaurants – South Whidbey

Special Food Services

Drinking Places (Alcoholic Beverages)

Restaurants and Other Eating Places

Total Foodservice & Drinking Places



40%
of market
potential
goes **out** of
South
Whidbey.

Store Type

Potential

Estimated

Surplus/
Leakage

Special Food Services

4,146,731

2,071,575

0.5

Drinking Places (Alcoholic Beverages)

2,666,799

670,232

0.3

Restaurants and Other Eating Places

47,014,956

27,745,847

0.6

Total Foodservice & Drinking Places

53,828,485

30,487,654

0.6

Clothing – South Whidbey

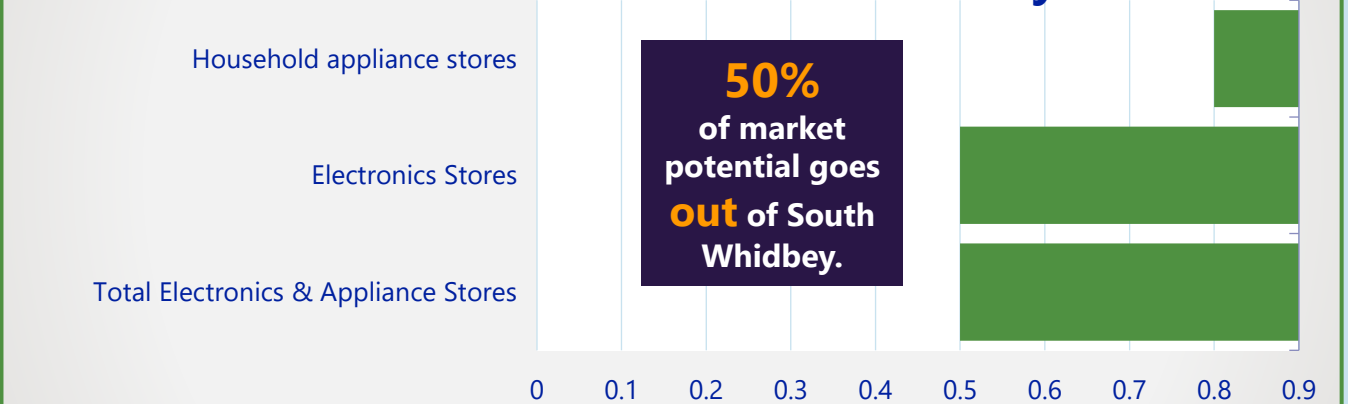


Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	634,897	757,599	1.2
Women's Clothing Stores	4,864,029	1,577,443	0.3
Children's and Infants' Clothing Stores	646,279	214,809	0.3
Family Clothing Stores	9,653,143	7,404,658	0.8
Clothing Accessories Stores	979,887	149,155	0.2
Other Clothing Stores	1,996,501	917,896	0.5
Shoe Stores	2,554,125	5,019,034	2.0
Jewelry Stores	2,298,231	4,693,275	2.0
Luggage & Leather Goods Stores	257,267	51,084	0.2
Total Clothing & Clothing Accessories Stores	23,884,358	20,784,953	0.9

Hobby – South Whidbey

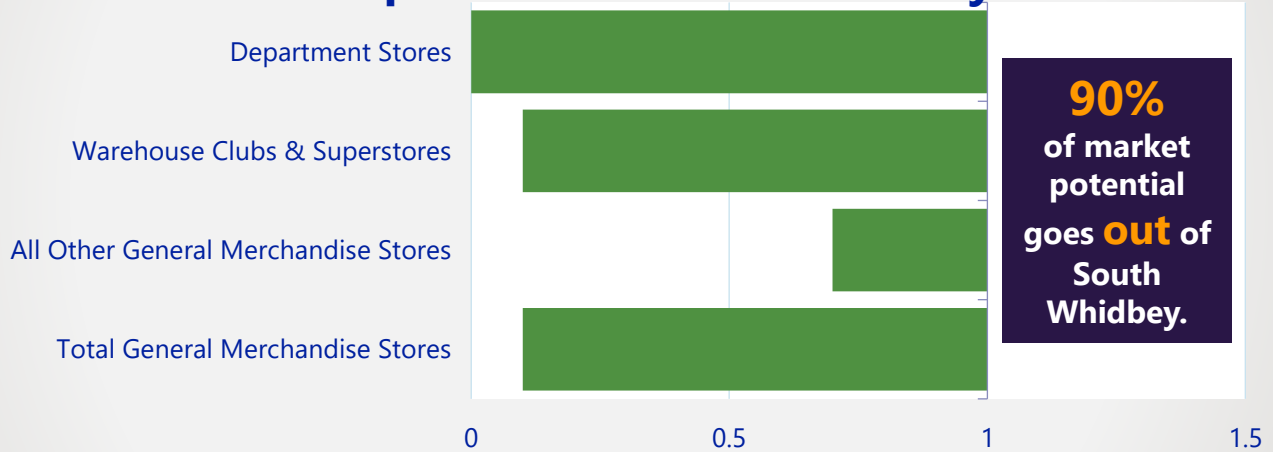


Electronics – South Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	1,129,215	895,003	0.8
Electronics Stores	7,231,393	3,333,877	0.5
Total Electronics & Appliance Stores	8,360,608	4,228,880	0.5

Department – South Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	12,430,563	61,379	0.0
Warehouse Clubs & Superstores	37,309,750	2,033,468	0.1
All Other General Merchandise Stores	6,443,782	4,762,248	0.7
Total General Merchandise Stores	56,184,095	6,857,096	0.1

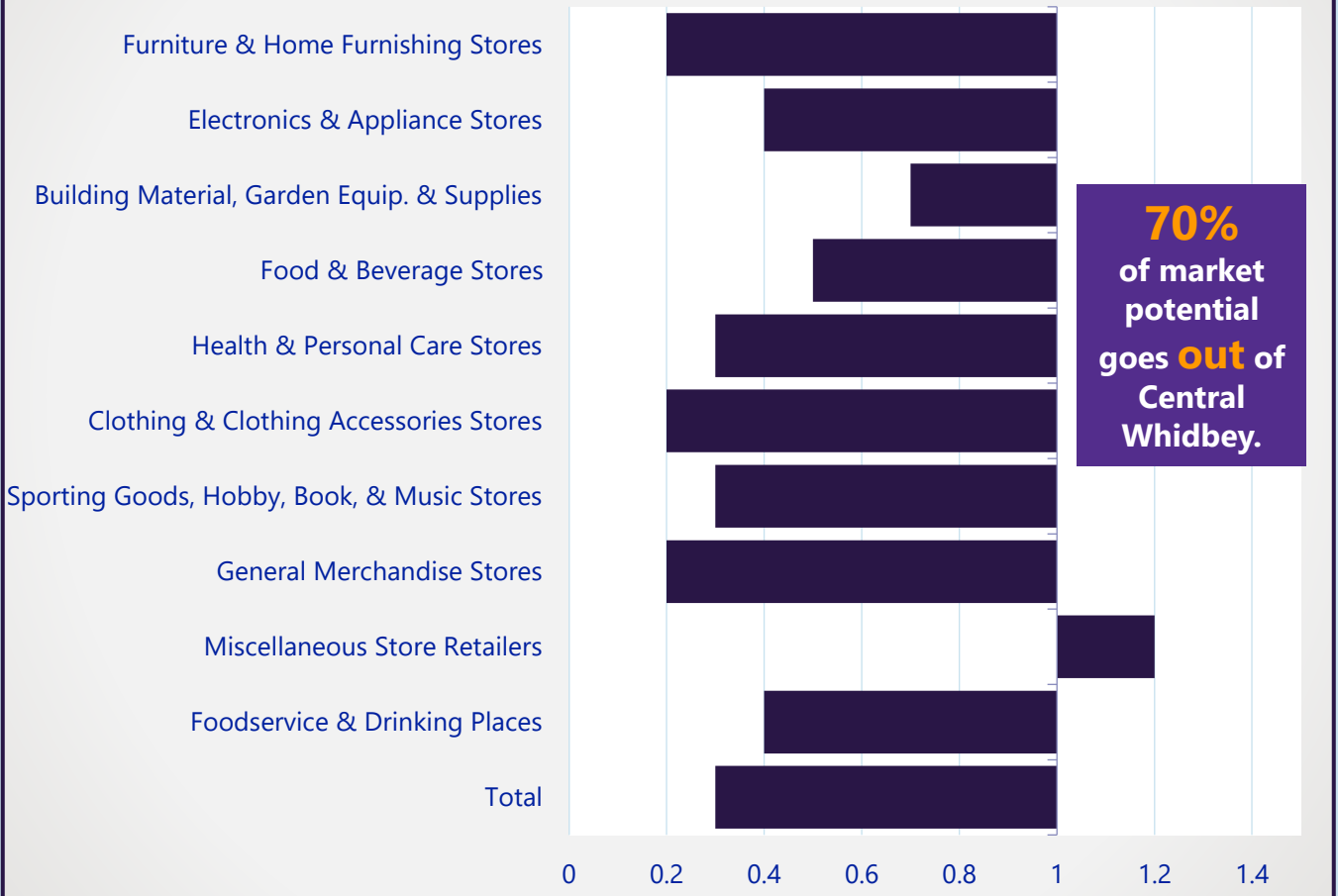
Miscellaneous – South Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Florists	442,986	345,695	0.8
Office Supplies and Stationery Stores	832,279	422,017	0.5
Gift, Novelty, and Souvenir Stores	1,245,033	999,597	0.8
Used Merchandise Stores	1,375,507	1,248,486	0.9
Other Miscellaneous Store Retailers	7,102,192	13,137,636	1.8
Total Miscellaneous Store Retailers	10,997,997	16,153,431	1.5

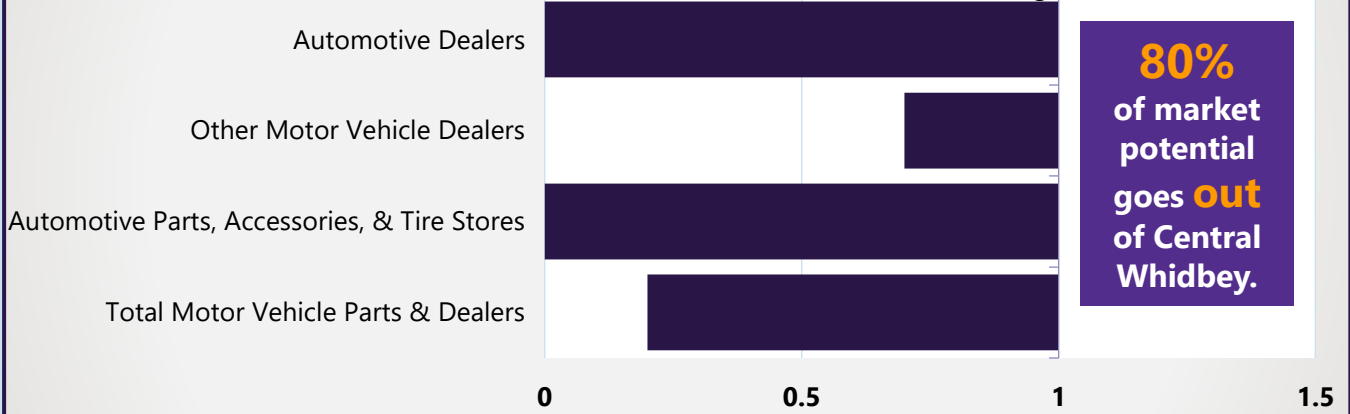
Central Whidbey

Leakage and Surplus

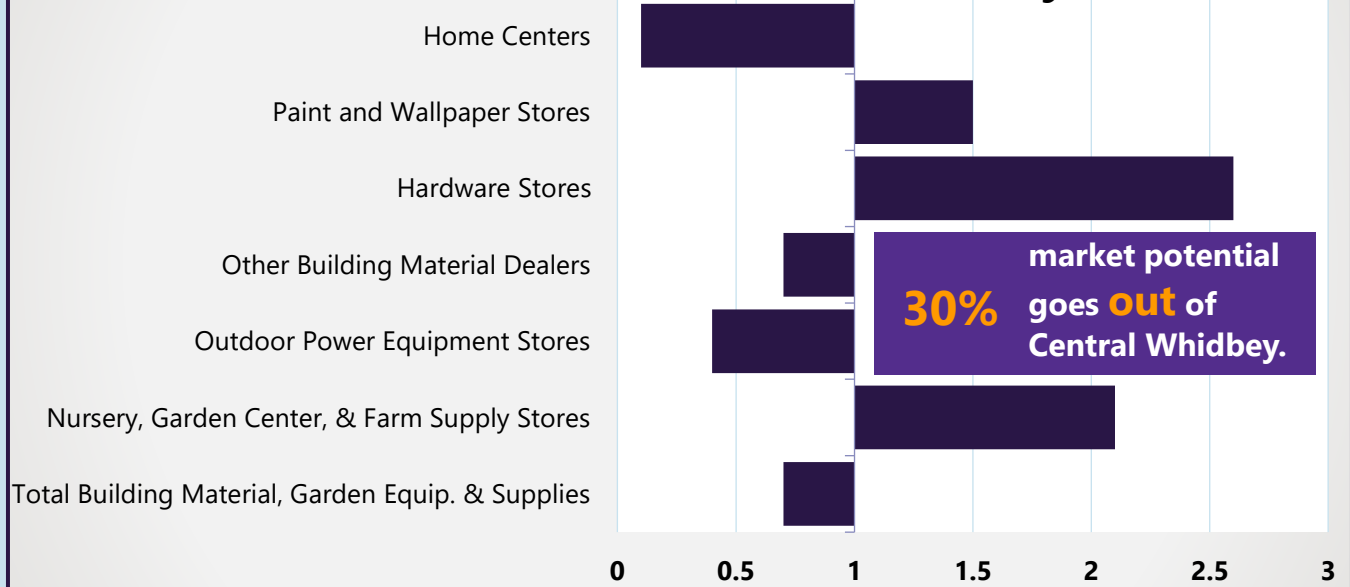


Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	100,882,680	15,265,132	0.2
Furniture & Home Furnishing Stores	7,004,268	1,270,334	0.2
Electronics & Appliance Stores	7,188,597	2,720,155	0.4
Building Material, Garden Equip. & Supplies	25,492,499	18,803,112	0.7
Food & Beverage Stores	48,579,995	22,949,042	0.5
Health & Personal Care Stores	20,113,339	5,307,590	0.3
Clothing & Clothing Accessories Stores	20,837,192	3,421,197	0.2
Sporting Goods, Hobby, Book, & Music Stores	8,959,278	3,015,643	0.3
General Merchandise Stores	48,900,774	9,450,145	0.2
Miscellaneous Store Retailers	9,611,296	11,710,022	1.2
Foodservice & Drinking Places	47,145,009	17,140,650	0.4
Total	344,714,927	111,053,023	0.3

Vehicles – Central Whidbey

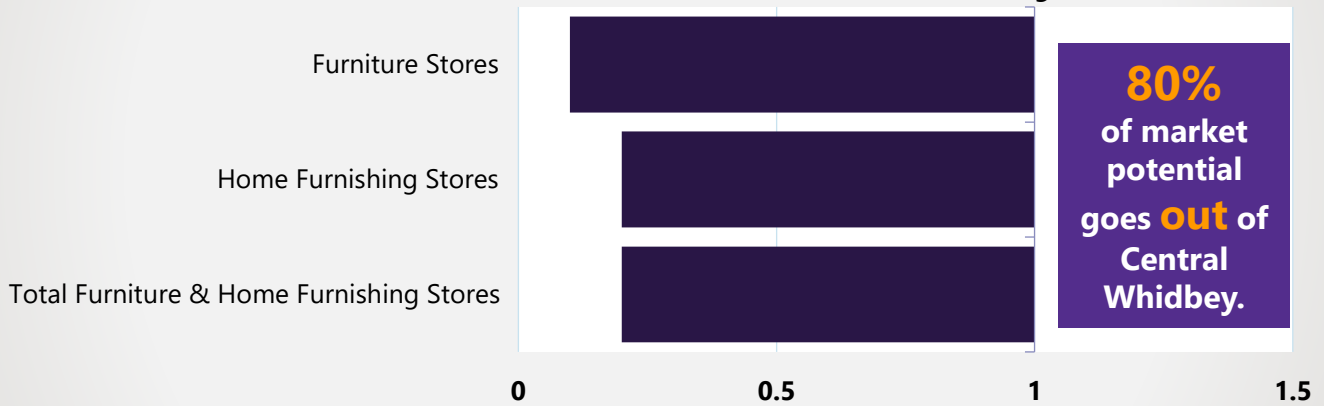


Hardware – Central Whidbey

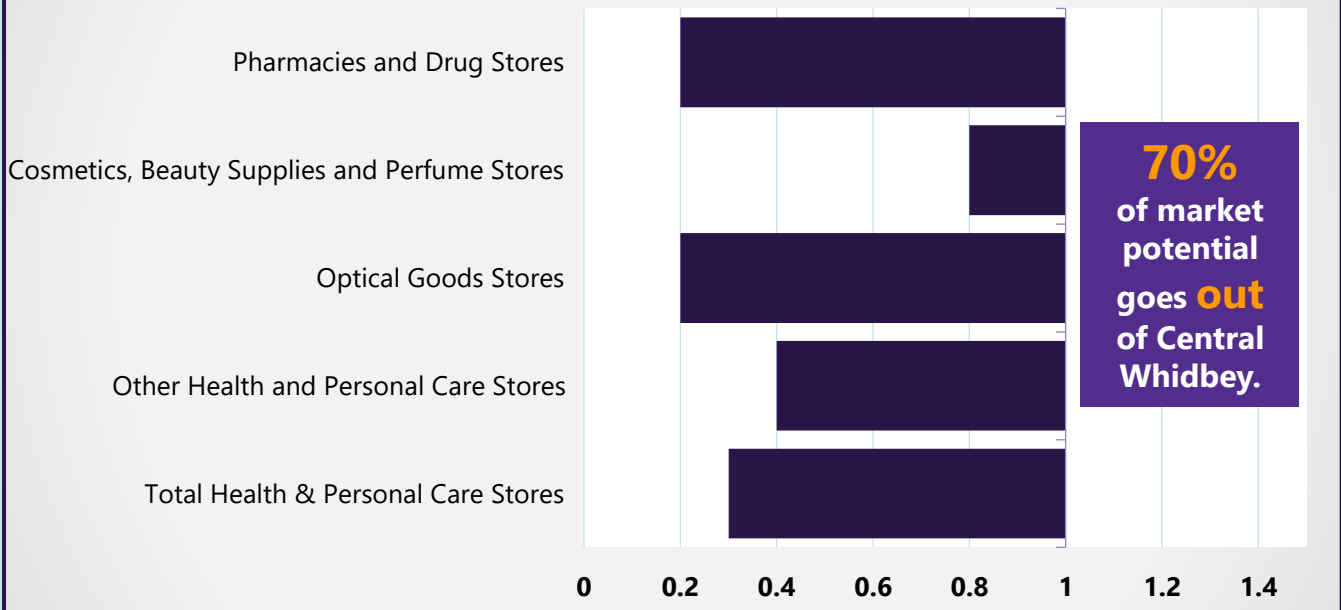


Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	12,088,638	1,197,652	0.1
Paint and Wallpaper Stores	814,629	1,253,580	1.5
Hardware Stores	1,881,712	4,971,403	2.6
Other Building Material Dealers	7,457,640	5,390,075	0.7
Outdoor Power Equipment Stores	480,619	202,908	0.4
Nursery, Garden Center, & Farm Supply Stores	2,769,261	5,787,493	2.1
Total Building Material, Garden Equip. & Supplies	25,492,499	18,803,112	0.7

Furniture – Central Whidbey

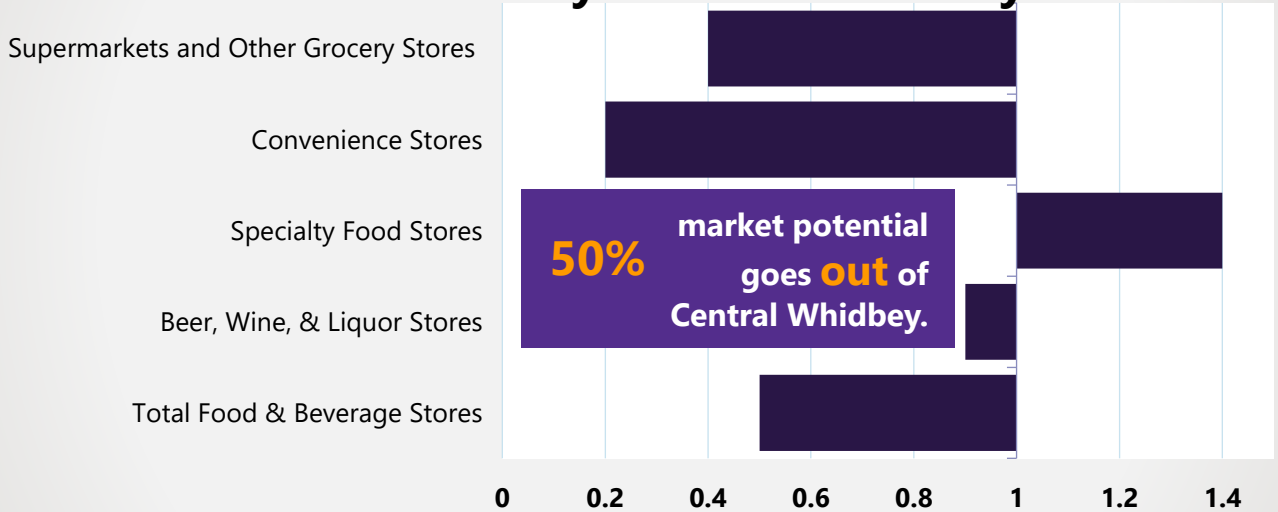


Health – Central Whidbey



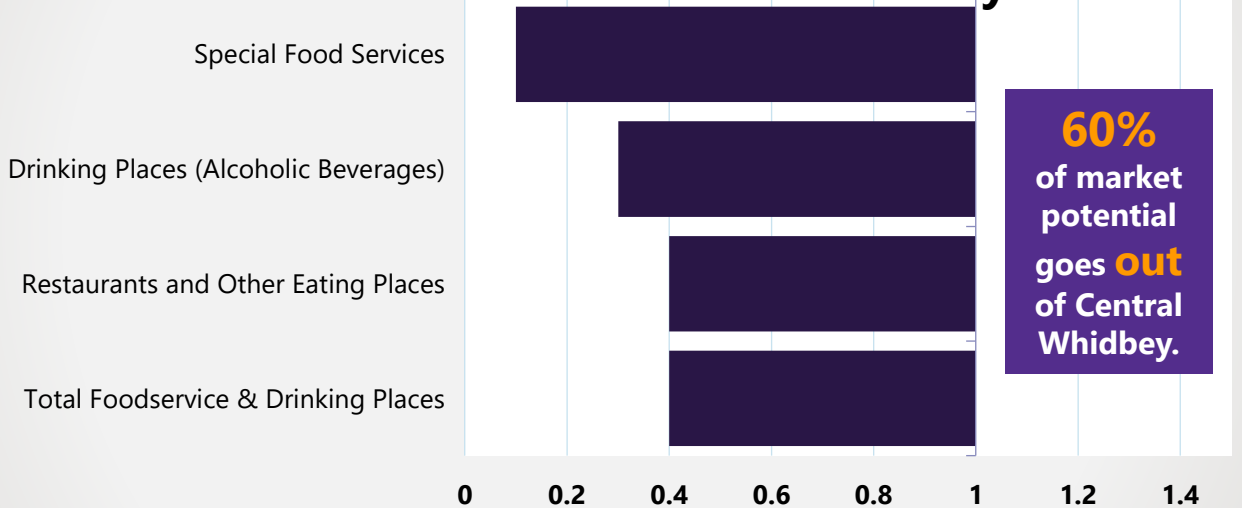
Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	16,462,479	3,614,773	0.2
Cosmetics, Beauty Supplies and Perfume Stores	1,186,593	965,854	0.8
Optical Goods Stores	1,123,893	241,204	0.2
Other Health and Personal Care Stores	1,340,374	485,759	0.4
Total Health & Personal Care Stores	20,113,339	5,307,590	0.3

Grocery – Central Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Supermarkets and Other Grocery Stores	40,083,267	15,555,937	0.4
Convenience Stores	1,798,249	329,145	0.2
Specialty Food Stores	1,520,681	2,154,112	1.4
Beer, Wine, & Liquor Stores	5,177,798	4,909,847	0.9
Total Food & Beverage Stores	48,579,995	22,949,042	0.5

Restaurants – Central Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	3,558,803	238,005	0.1
Drinking Places (Alcoholic Beverages)	2,308,870	743,968	0.3
Restaurants and Other Eating Places	41,277,336	16,158,678	0.4
Total Foodservice & Drinking Places	47,145,009	17,140,650	0.4

Clothing – Central Whidbey



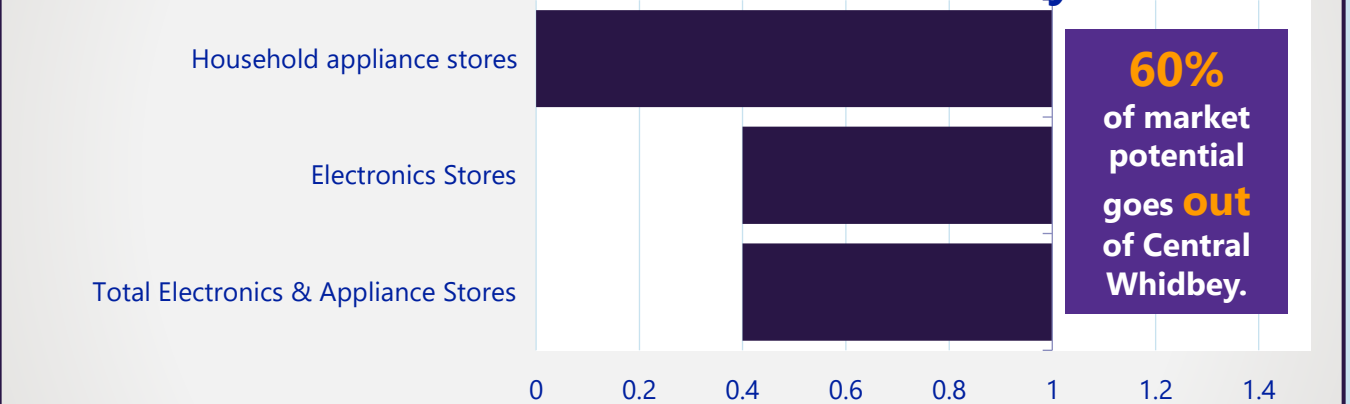
Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	538,626	13	0.0
Women's Clothing Stores	4,248,897	356,925	0.1
Children's and Infants' Clothing Stores	590,343	10	0.0
Family Clothing Stores	8,414,331	622,112	0.1
Clothing Accessories Stores	851,966	483,739	0.6
Other Clothing Stores	1,739,220	648,069	0.4
Shoe Stores	2,202,308	75	0.0
Jewelry Stores	2,024,595	1,296,262	0.6
Luggage & Leather Goods Stores	226,906	13,992	0.1
Total Clothing & Clothing Accessories Stores	20,837,192	3,421,197	0.2

Hobby – Central Whidbey



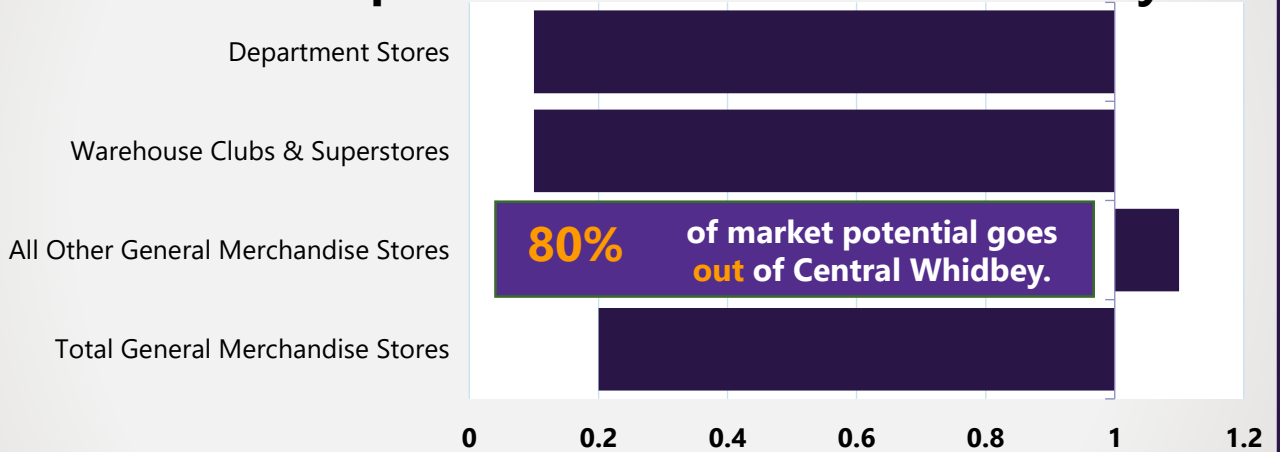
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	6,452,109	273,952	0.0
Hobby, Toy, and Game Stores	1,307,081	1,920,718	1.5
Sewing, Needlework, and Piece Goods Stores	234,518	283,487	1.2
Musical Instrument and Supplies Stores	218,129	6,437	0.0
Book Stores	559,664	96,704	0.2
News Dealers and Newsstands	187,777	434,346	2.3
Total Sporting Goods, Hobby, Book, & Music Stores	8,959,278	3,015,643	0.3

Electronics – Central Whidbey

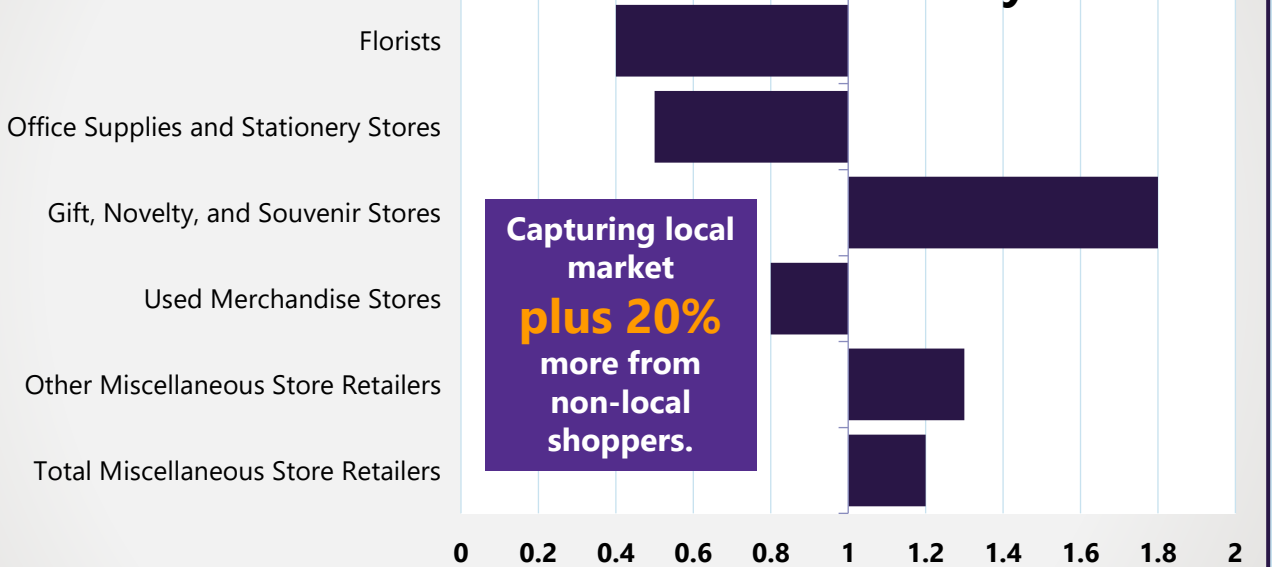


Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	994,994	1,568	0.0
Electronics Stores	6,193,602	2,718,587	0.4
Total Electronics & Appliance Stores	7,188,597	2,720,155	0.4

Department Stores – Central Whidbey



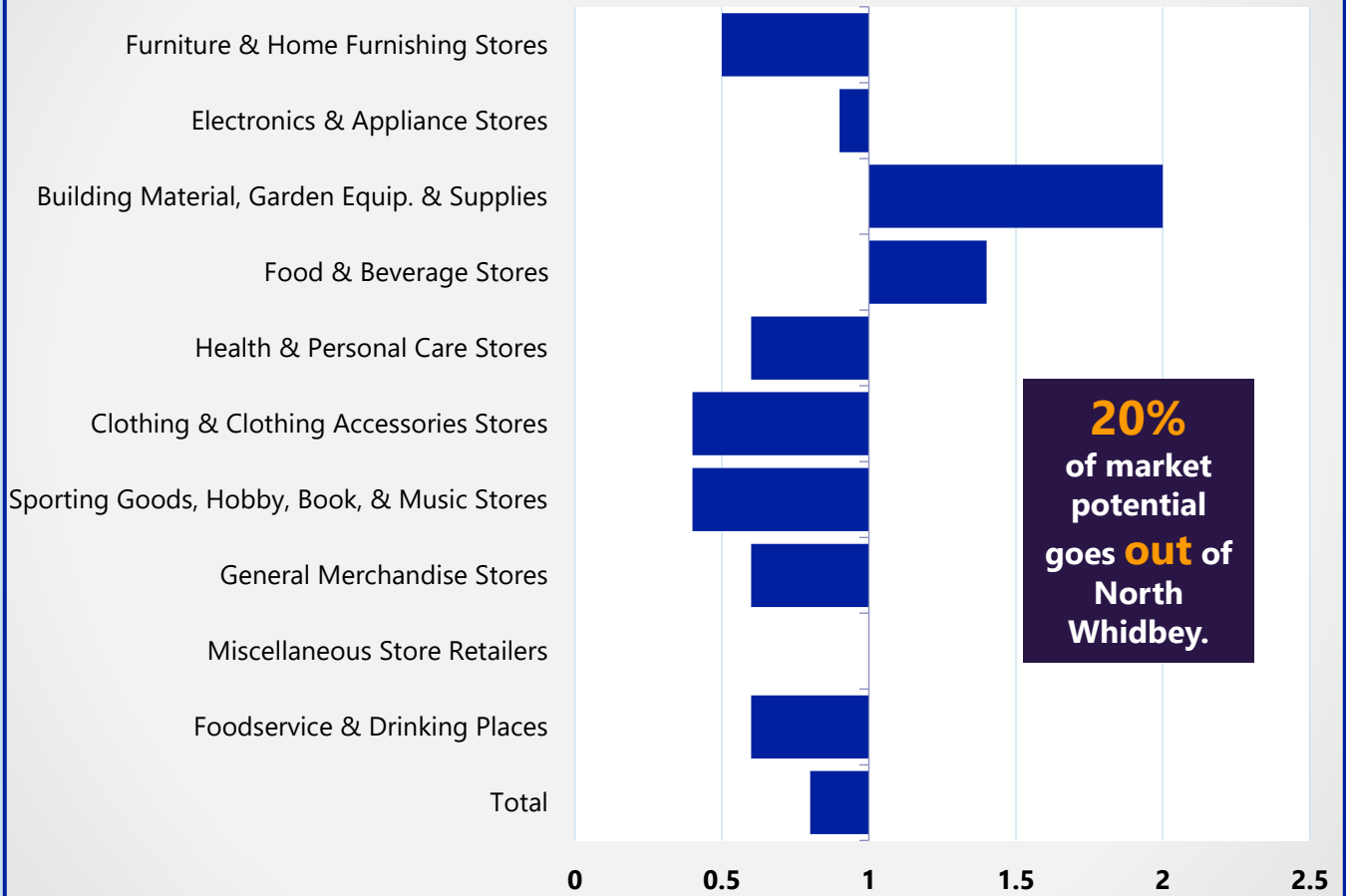
Miscellaneous – Central Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Florists	394,708	159,725	0.4
Office Supplies and Stationery Stores	735,200	391,467	0.5
Gift, Novelty, and Souvenir Stores	1,094,307	1,989,613	1.8
Used Merchandise Stores	1,212,632	986,009	0.8
Other Miscellaneous Store Retailers	6,174,448	8,183,207	1.3
Total Miscellaneous Store Retailers	9,611,296	11,710,022	1.2

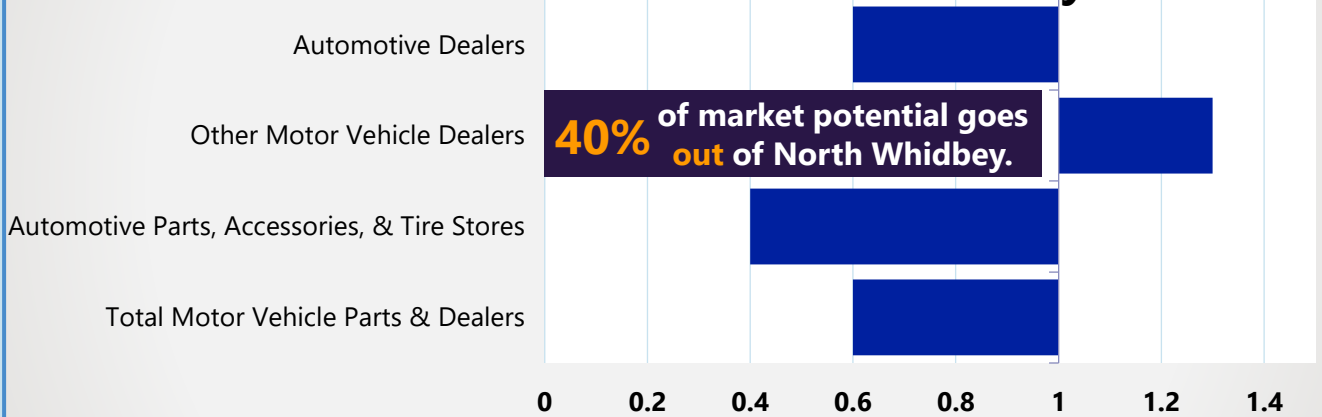
North Whidbey

Leakage and Surplus



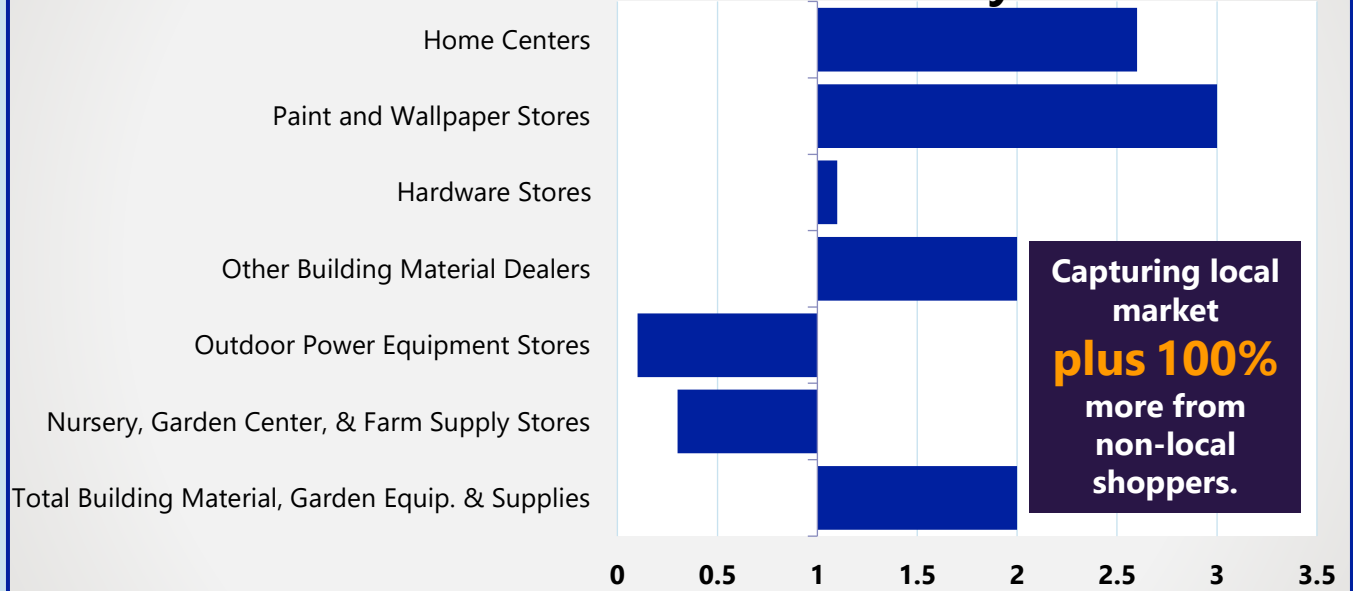
Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	203,971,403	130,332,460	0.6
Furniture & Home Furnishing Stores	15,701,066	7,498,267	0.5
Electronics & Appliance Stores	16,606,252	14,986,753	0.9
Building Material, Garden Equip. & Supplies	46,144,584	93,855,558	2.0
Food & Beverage Stores	112,465,722	157,432,910	1.4
Health & Personal Care Stores	41,015,877	23,067,188	0.6
Clothing & Clothing Accessories Stores	51,659,075	19,423,798	0.4
Sporting Goods, Hobby, Book, & Music Stores	18,147,267	7,661,324	0.4
General Merchandise Stores	110,512,123	70,661,503	0.6
Miscellaneous Store Retailers	18,814,109	17,983,905	1.0
Foodservice & Drinking Places	117,583,765	64,809,181	0.6
Total	752,621,241	607,712,846	0.8

Vehicles – North Whidbey



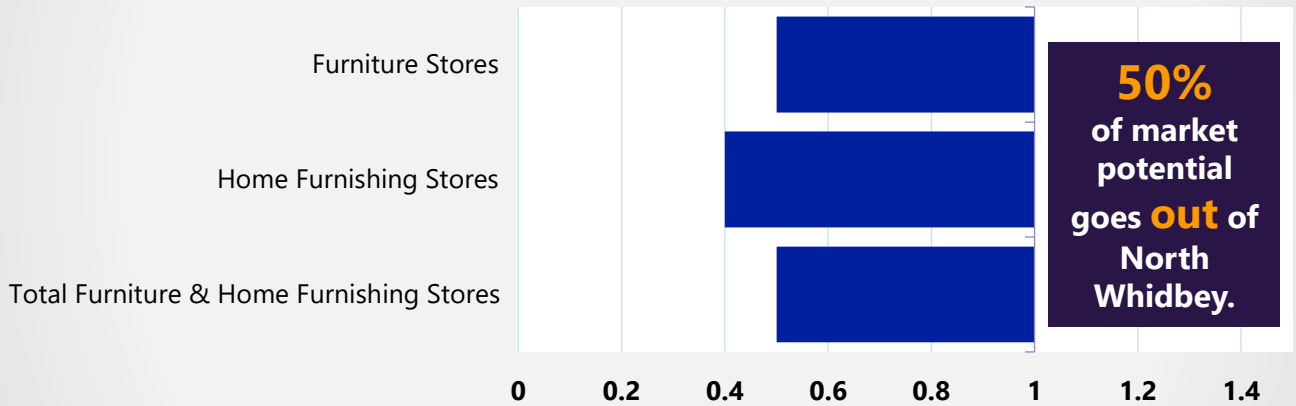
Store Type	Potential	Estimated	Surplus/Leakage
Automotive Dealers	155,931,933	88,167,509	0.6
Other Motor Vehicle Dealers	25,959,944	32,604,894	1.3
Automotive Parts, Accessories, & Tire Stores	22,079,526	9,560,057	0.4
Total Motor Vehicle Parts & Dealers	203,971,403	130,332,460	0.6

Hardware – North Whidbey

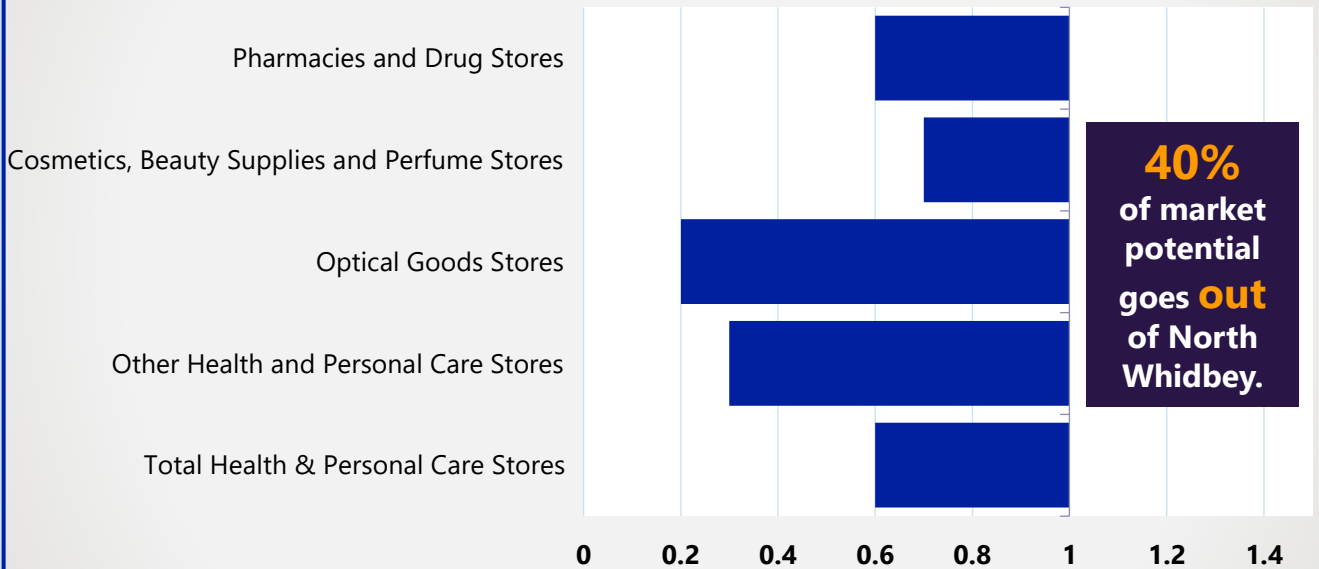


Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	22,202,046	58,194,820	2.6
Paint and Wallpaper Stores	1,399,570	4,155,057	3.0
Hardware Stores	3,301,740	3,748,938	1.1
Other Building Material Dealers	13,043,808	25,993,665	2.0
Outdoor Power Equipment Stores	921,983	86,497	0.1
Nursery, Garden Center, & Farm Supply Stores	5,275,437	1,676,582	0.3
Total Building Material, Garden Equip. & Supplies	46,144,584	93,855,558	2.0

Furniture – North Whidbey

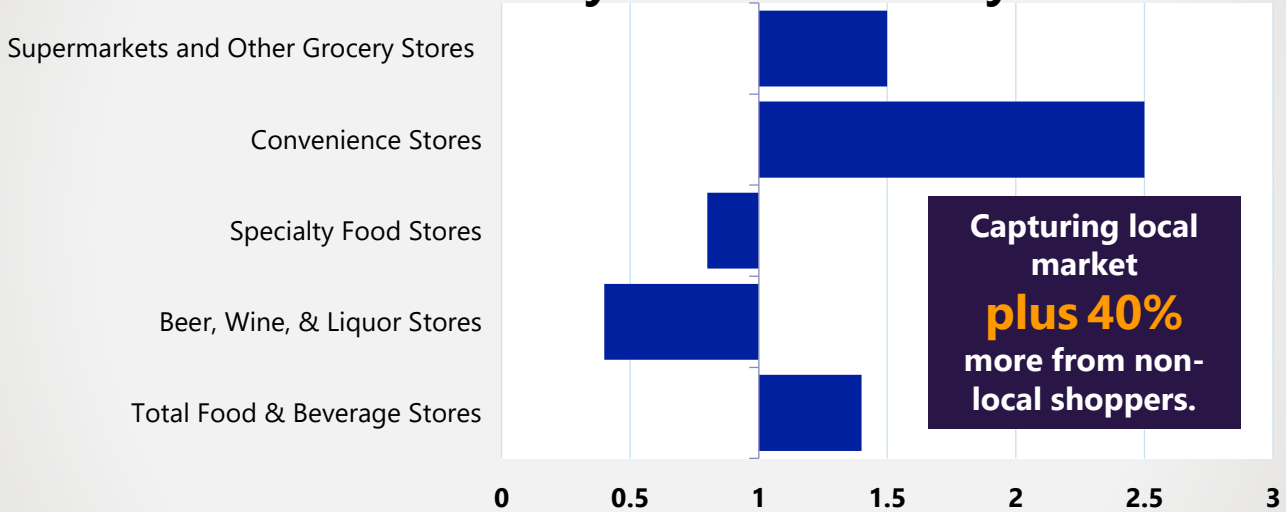


Health – North Whidbey

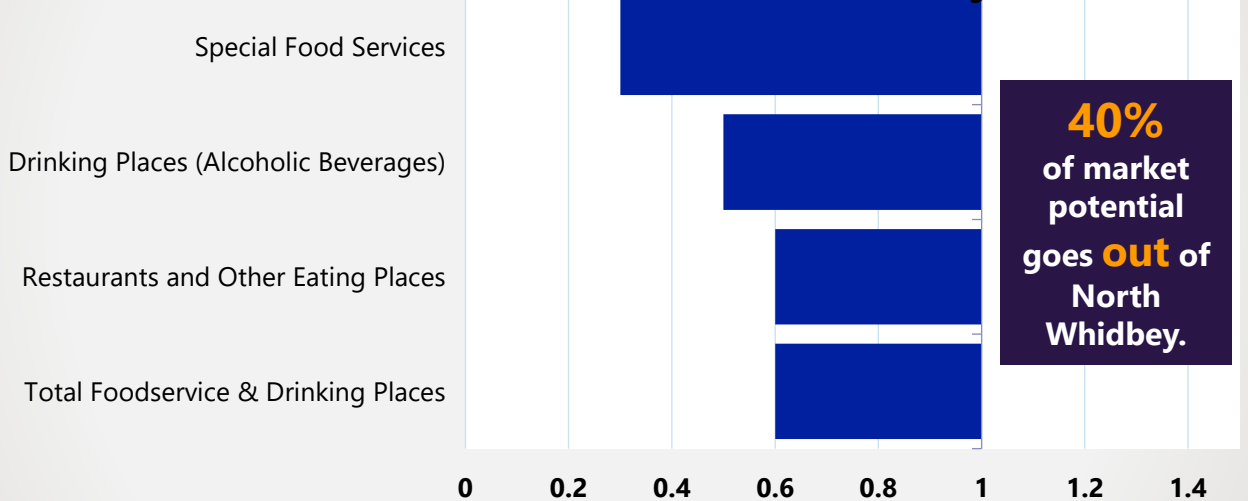


Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	33,870,116	20,364,559	0.6
Cosmetics, Beauty Supplies and Perfume Stores	2,353,502	1,566,534	0.7
Optical Goods Stores	2,047,981	364,055	0.2
Other Health and Personal Care Stores	2,744,277	772,040	0.3
Total Health & Personal Care Stores	41,015,877	23,067,188	0.6

Grocery – North Whidbey



Restaurants – North Whidbey



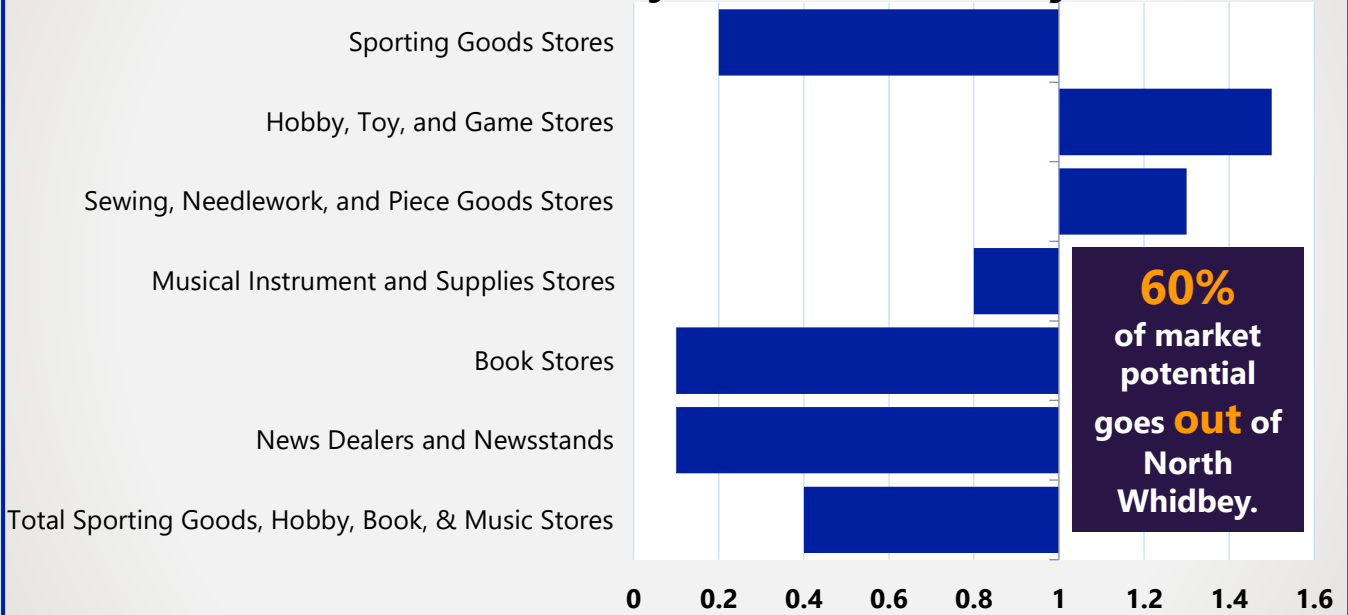
Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	9,085,483	2,571,623	0.3
Drinking Places (Alcoholic Beverages)	5,333,468	2,671,679	0.5
Restaurants and Other Eating Places	103,164,814	59,565,879	0.6
Total Foodservice & Drinking Places	117,583,765	64,809,181	0.6

Clothing – North Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	1,253,184	0	0.0
Women's Clothing Stores	10,230,581	1,979,663	0.2
Children's and Infants' Clothing Stores	1,825,350	760,709	0.4
Family Clothing Stores	20,487,025	3,082,205	0.2
Clothing Accessories Stores	2,056,872	971,082	0.5
Other Clothing Stores	4,152,897	3,088,231	0.7
Shoe Stores	5,402,573	1,336,519	0.2
Jewelry Stores	5,751,621	8,117,124	1.4
Luggage & Leather Goods Stores	498,971	88,265	0.2
Total Clothing & Clothing Accessories Stores	51,659,075	19,423,798	0.4

Hobby – North Whidbey



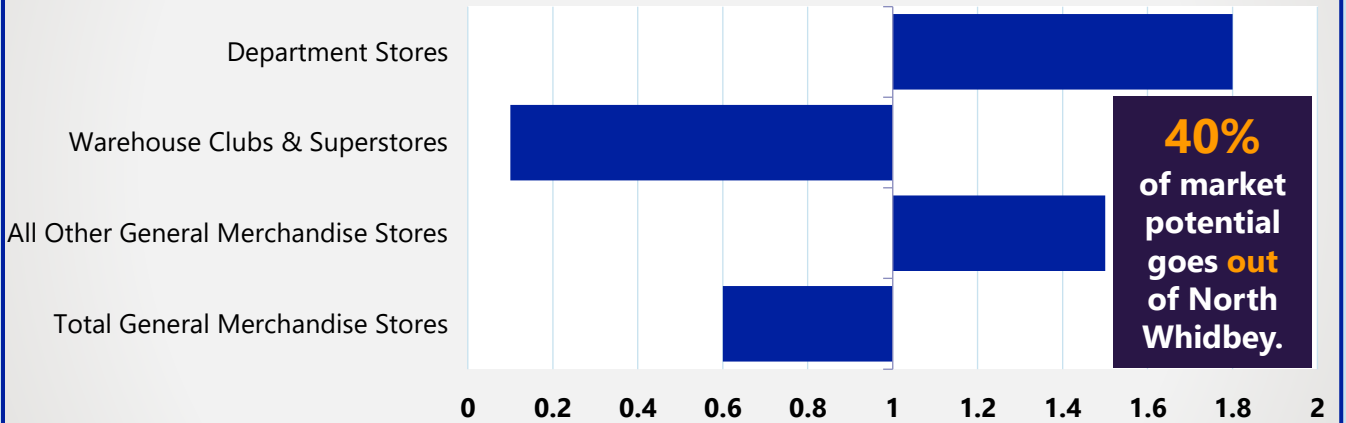
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	12,550,042	2,365,728	0.2
Hobby, Toy, and Game Stores	2,801,027	4,140,491	1.5
Sewing, Needlework, and Piece Goods Stores	442,157	563,772	1.3
Musical Instrument and Supplies Stores	522,343	408,127	0.8
Book Stores	1,399,004	145,371	0.1
News Dealers and Newsstands	432,694	37,834	0.1
Total Sporting Goods, Hobby, Book, & Music Stores	18,147,267	7,661,324	0.4

Electronics – North Whidbey



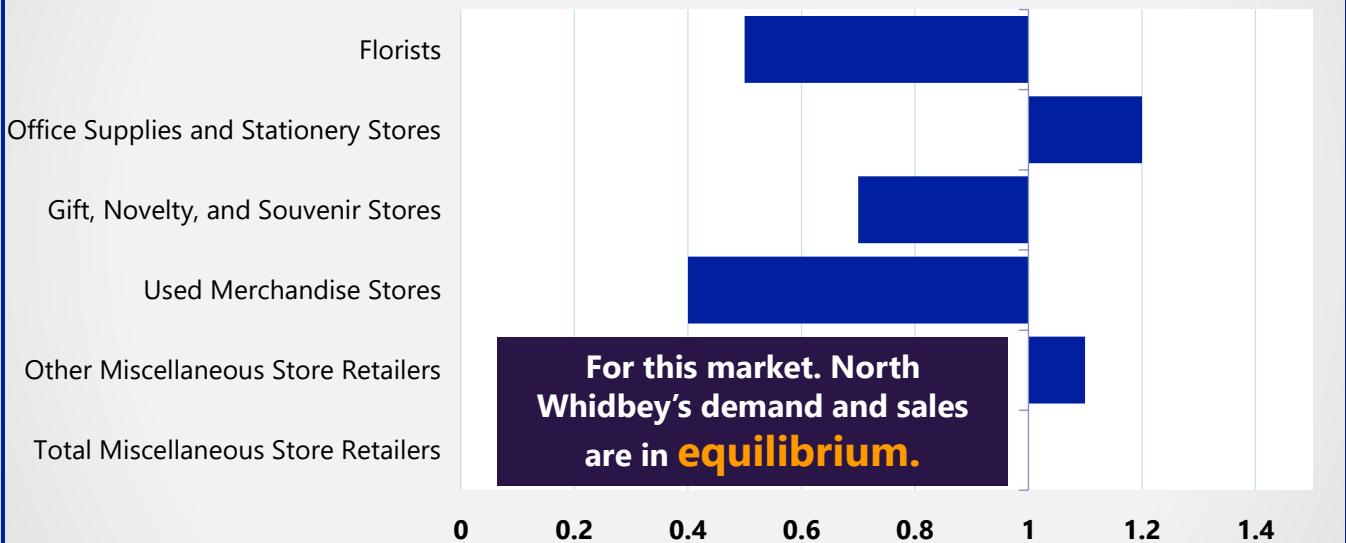
Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	2,244,844	3,319,769	1.5
Electronics Stores	14,361,408	11,666,984	0.8
Total Electronics & Appliance Stores	16,606,252	14,986,753	0.9

General Merchandise – North Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	25,069,641	45,060,910	1.8
Warehouse Clubs & Superstores	73,115,014	7,664,550	0.1
All Other General Merchandise Stores	12,327,468	17,936,042	1.5
Total General Merchandise Stores	110,512,123	70,661,503	0.6

Miscellaneous – North Whidbey



Store Type	Potential	Estimated	Surplus/Leakage
Florists	767,185	418,672	0.5
Office Supplies and Stationery Stores	1,650,663	1,945,226	1.2
Gift, Novelty, and Souvenir Stores	2,436,898	1,721,363	0.7
Used Merchandise Stores	2,677,247	1,155,526	0.4
Other Miscellaneous Store Retailers	11,282,116	12,743,118	1.1
Total Miscellaneous Store Retailers	18,814,109	17,983,905	1.0

Sources and Methodology

The data in this report comes from **the Buxton program database**.

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

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

Because this, Census data it will be about 1-2 years old based on the way the Census captures and updates its database.

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

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

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



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- ✓ Enhancing economic vitality of Island County
- ✓ Assisting local businesses find resources and connections
- ✓ Working to attract new businesses to our communities, and
- ✓ Engaging with community partners and leaders to enhance our collective prosperity and encourage our economic future

Membership in the EDCIC starts as low as \$70 for many businesses. Contact us for more information.