



retail academy

Colville Tribe, WA

Retail recruitment plan



DISCOVER

Research

Memberships, Subscriptions & Customized Reports

Crittenden Research

RLT
RETAIL LEASE TRAC



NATION'S
Restaurant News

PlainVanillaShell

SN
SUPERMARKET NEWS

Research Partners & Geographic Information Systems

TETRAD

Sitewise

 **STDB**

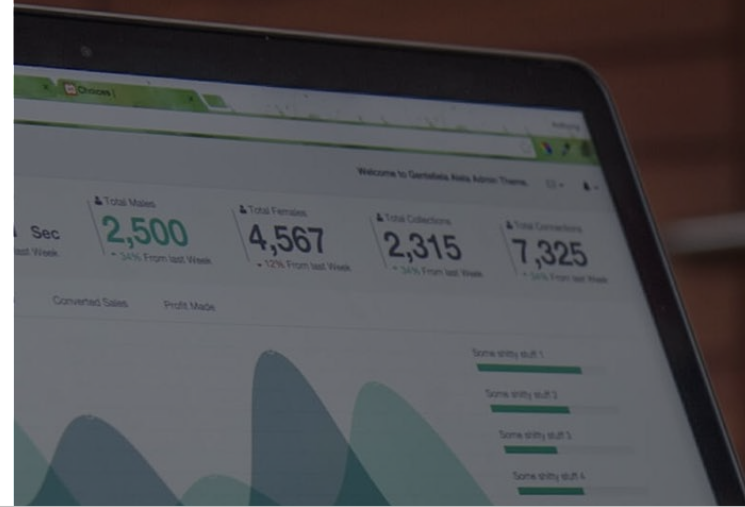
REGIS
online



DISCOVER

Research

where does all this information come from?





DISCOVER

Research

You have at your disposal thousands of variables from population and household incomes to spending patterns by retail category.

The information covered in this document represents the key highlights for your community. Retail Strategies has provided Walker County's primary point of contact an electronic copy of each of these reports from multiple geographic parameters.

The following are the highlights from a data and analytic perspective.

1

Demographic
Overview

2

Mobile Data
Collections

3

Customized Trade
Area Analysis

4

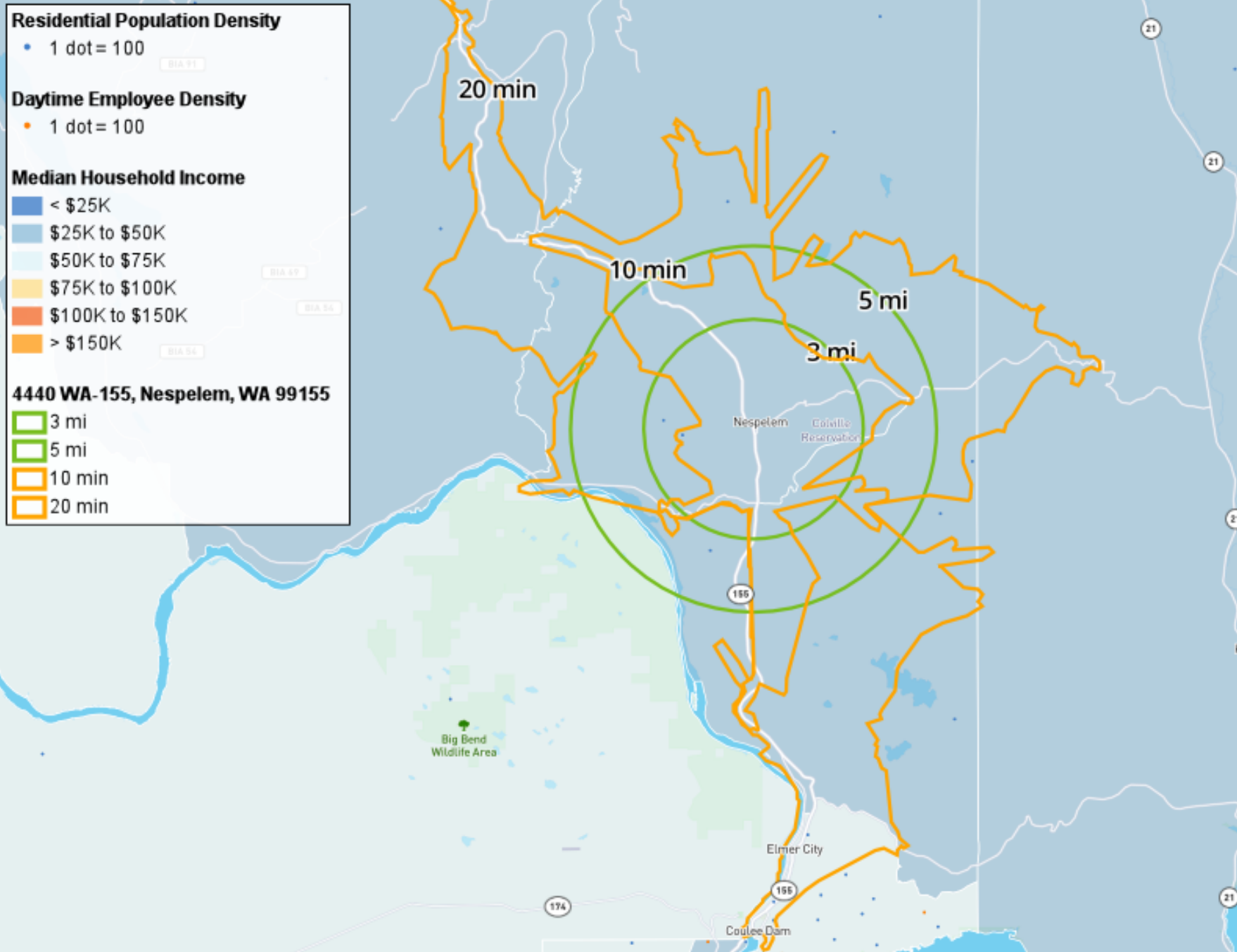
Lifestyle
Segmentation

5

Retail
Gap Analysis

6

Peer
Analysis





DISCOVER

Mile Radius & Drive Time Demographics

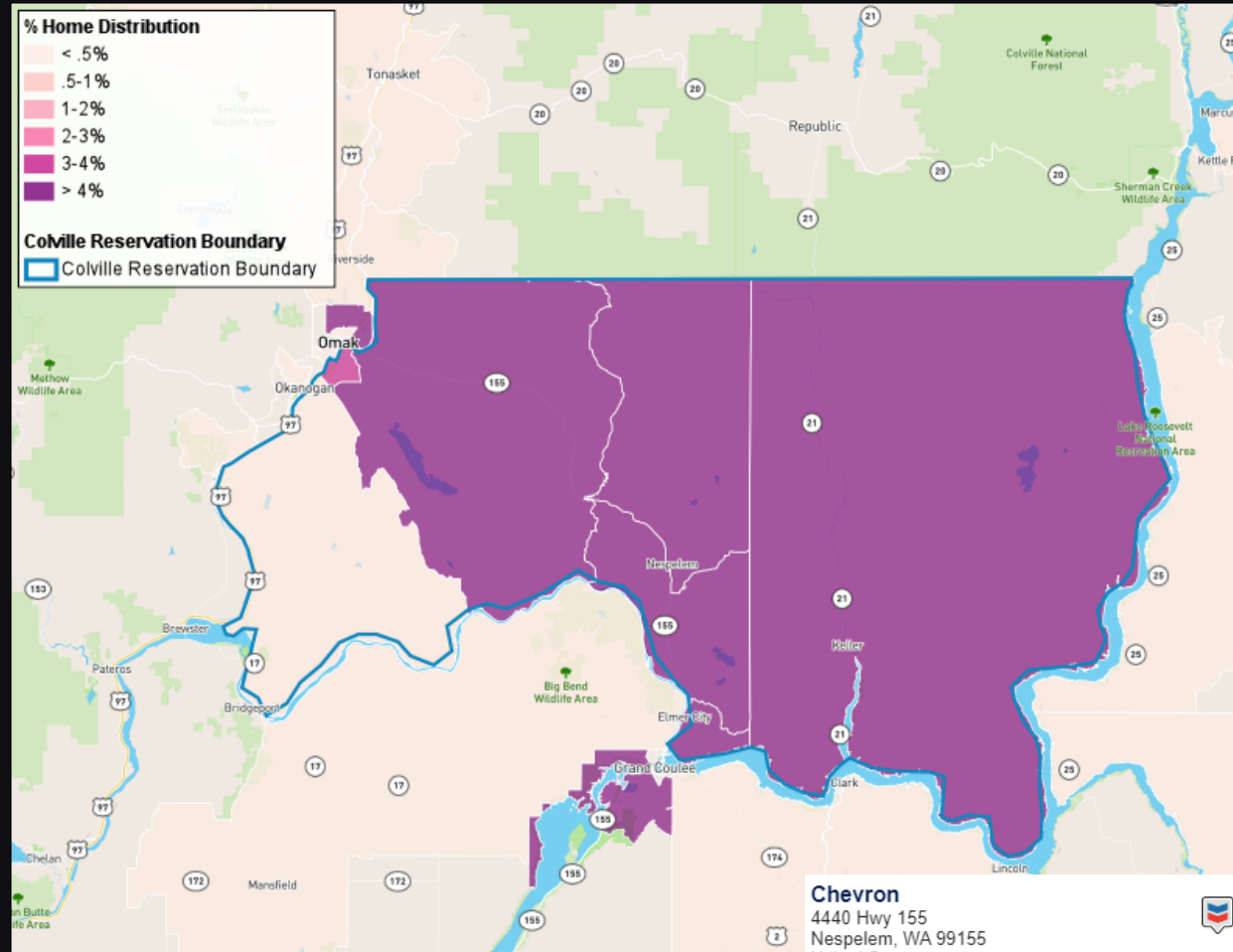
Category	3-Mile Radius	5-Mile Radius	10-Mile Radius	10-Minute Drive Time	20-Minute Drive Time	30-Minute Drive Time
Current Year Estimated Population	616	746	1,674	701	2,560	5,247
Number of Households	185	225	561	212	975	2,156
Projected Annual Growth (5 YR)	-2.32%	-2.35%	-1.71%	-2.27%	-0.97%	0.06%
Median HH Income 2021	\$36,821	\$37,327	\$42,772	\$36,028	\$51,444	\$52,660
Current Year Average Age	38.8	38.8	39.5	38.8	42	43.6
Average Home Value	\$251,336	\$252,295	\$246,574	\$249,826	\$244,535	\$257,430
Current Year % Bachelor's Degree	5%	5%	7%	5%	12%	11%
Daytime Population	512	606	1,263	552	2,107	4,264
Labor Force	494	598	1,351	562	2,099	4,345



CUSTOM TRADE AREA

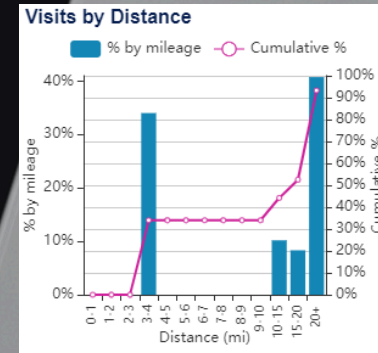
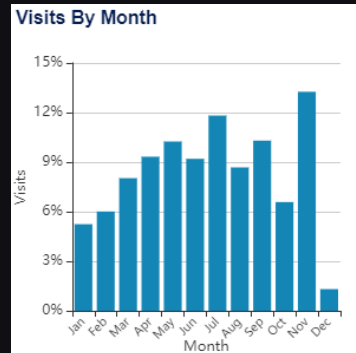
Mobile data collection

The Service uses data collected from mobile phone users who have agreed within their apps and phone settings to enable location information. The Service includes mobile phone data with latitude/longitude points that are accurate to approximately 20 feet. Data inputs are updated as quickly as every 24-hours. The data shown includes shopper who visited the defined location during the designated time period. This tool is intended to support the trade area but does not solely define the trade area.



The location tracked was Chevron

For the time period of September 2021- September 2022



Details	
Sector	Gas Stations
Sector Rank within County	#11 of 11
Estimated Annual Visits	42,908
Estimated Annual Visitors	21,918
Avg Distance from Home	17.0 miles
Average Dwell Time	159.5 min
Tourist Visits	6.6%
Brand	Chevron
Brand Rank within State	#390 of 403
Brand Rank within DMA	#49 of 53



CUSTOM TRADE AREA

Custom Trade Area

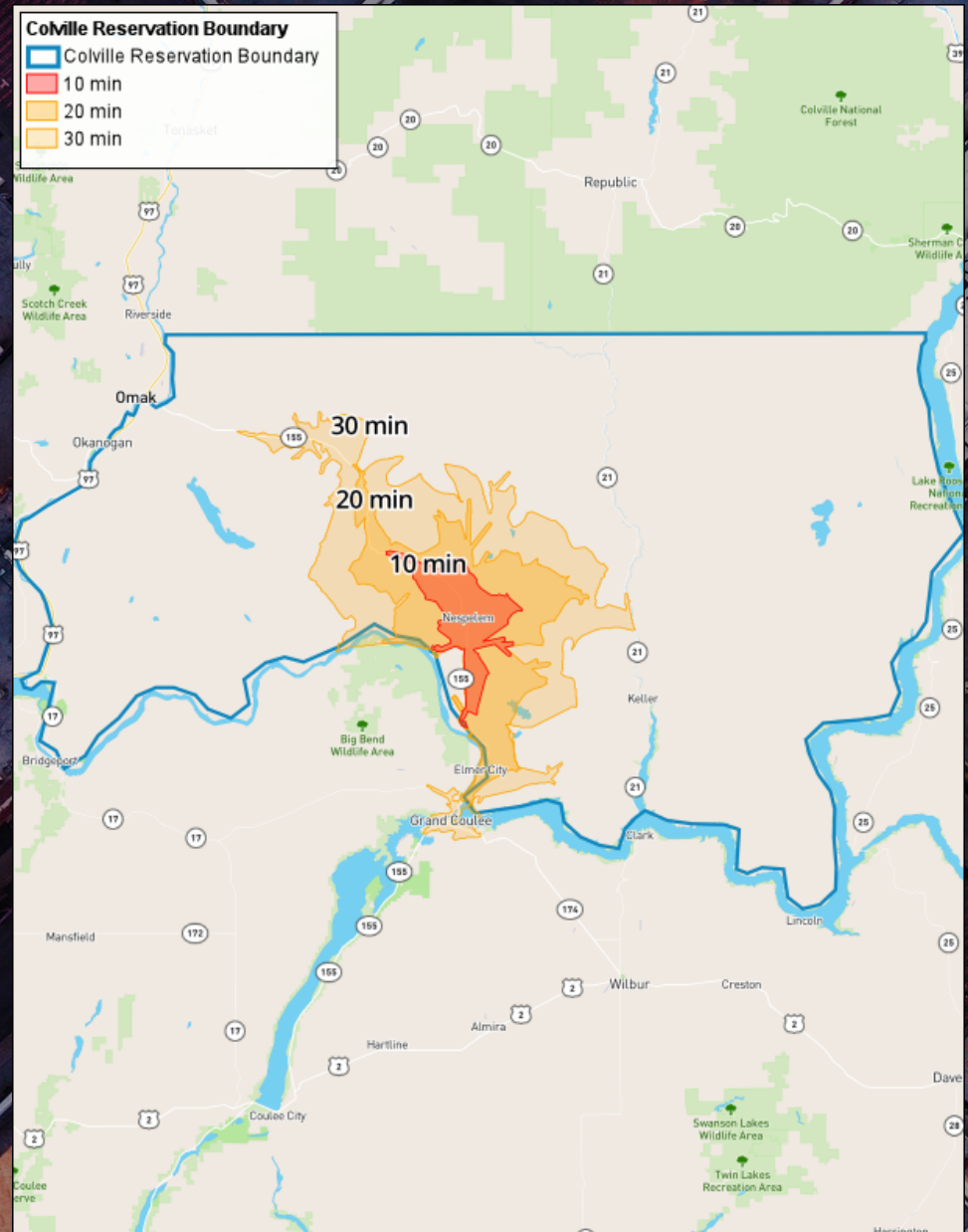
Each retailer has a specific set of site selection criteria they use to determine if they will have a profitable store. Municipal boundaries, radius rings and drive times area is a start.

A customized trade area is the next step to analyzing a market. A trade area defines a core customer base of consumers highly likely to shop and eat in the market at least once a month.

Your trade area has been created by combining a series of drive times, mobile data analysis, geographic boundaries and proximity to neighboring shopping destinations.

Each retailer will analyze their own trade area based on their existing stores, their competition and site selection criteria.

3





DISCOVER

Custom Trade Area



6,863

2021 estimated population

6,858

Projected 2026 population

-0.1%

Projected growth rate
2021-2026

40

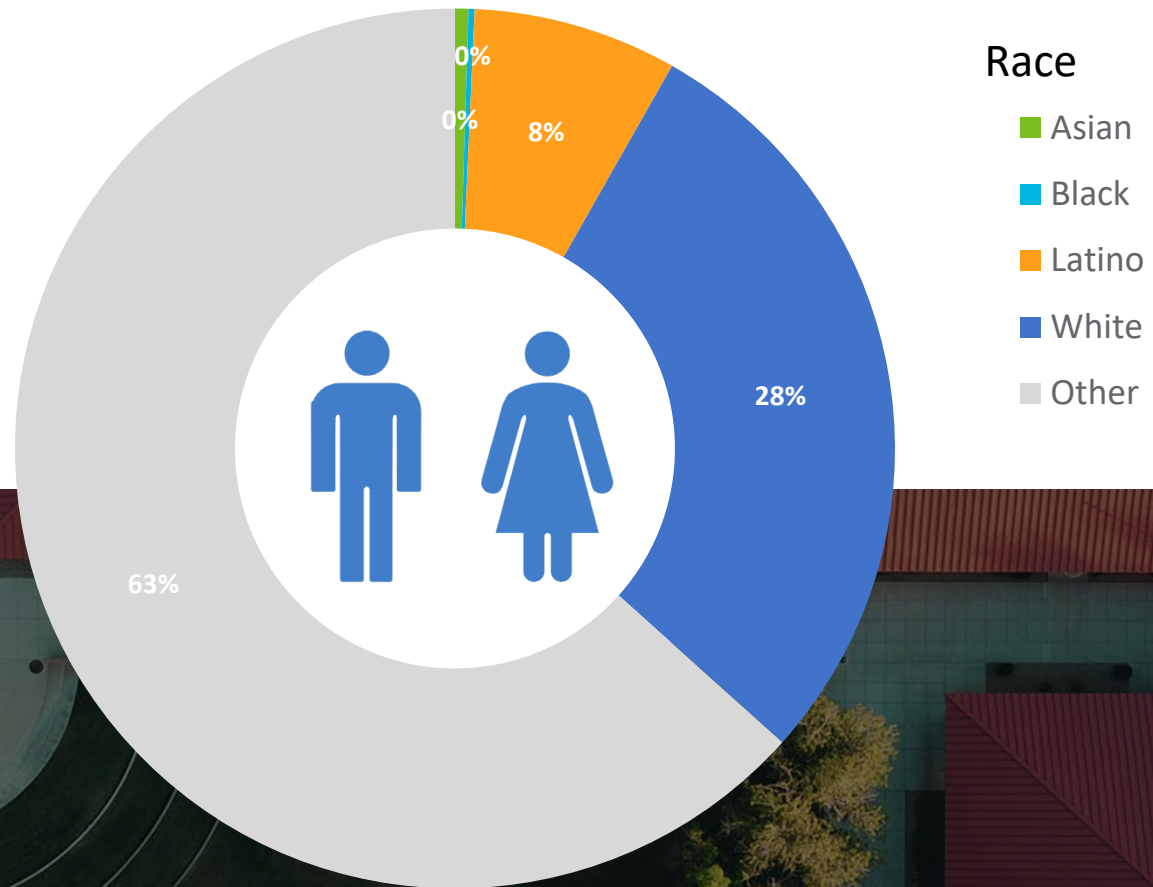
male average age

41

female average age

CUSTOM TRADE AREA

Our Research



DISCOVER

Our Research

3,046

number of households

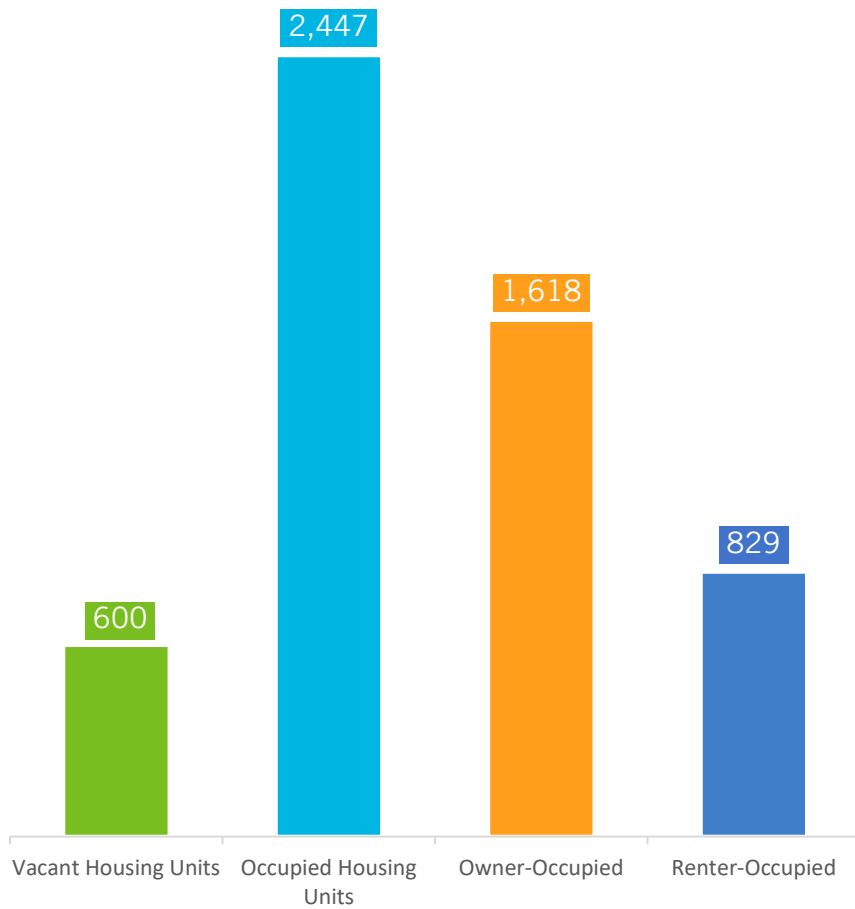
\$43,229

median household income

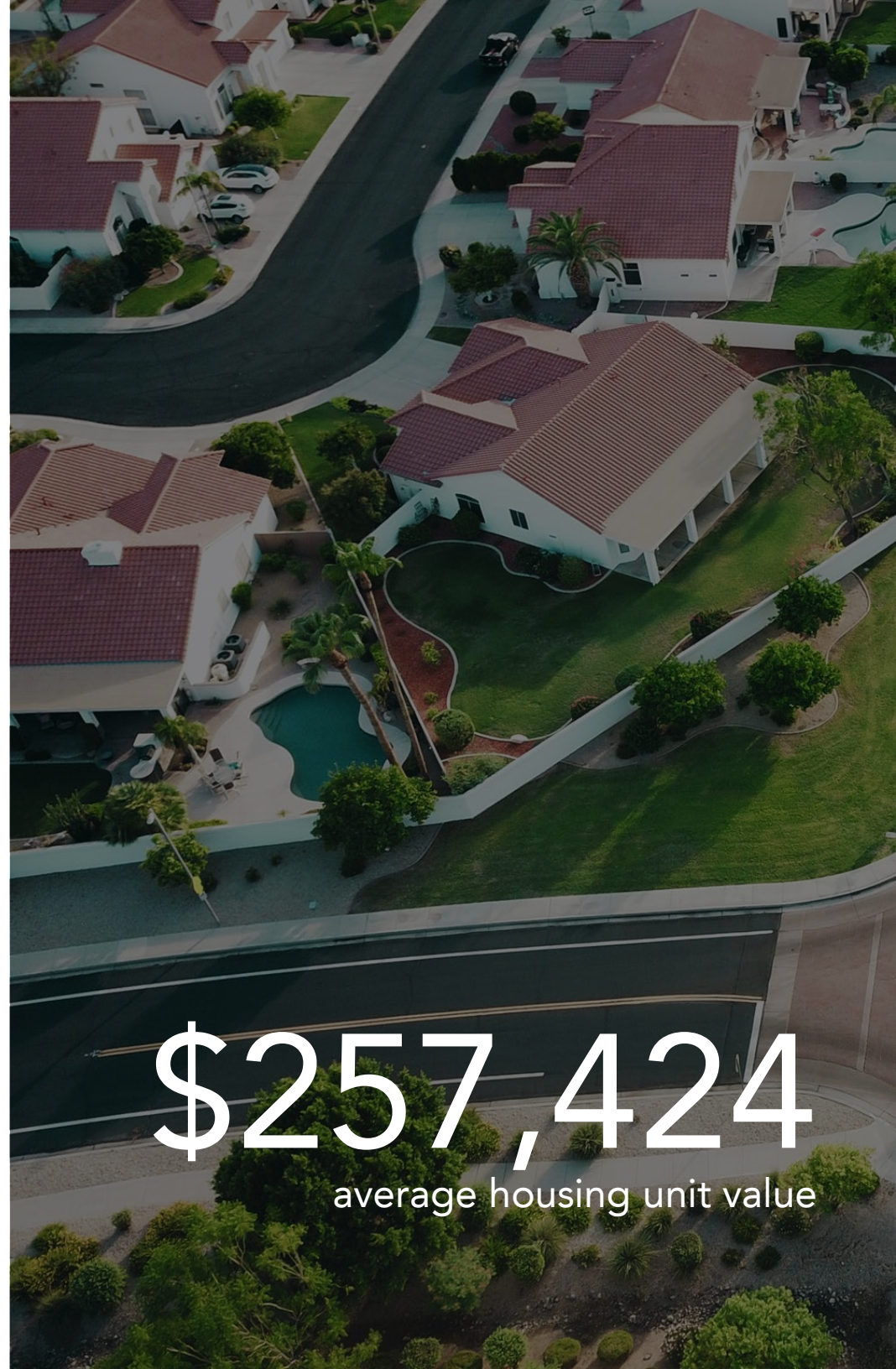


CUSTOM TRADE AREA

Our Research



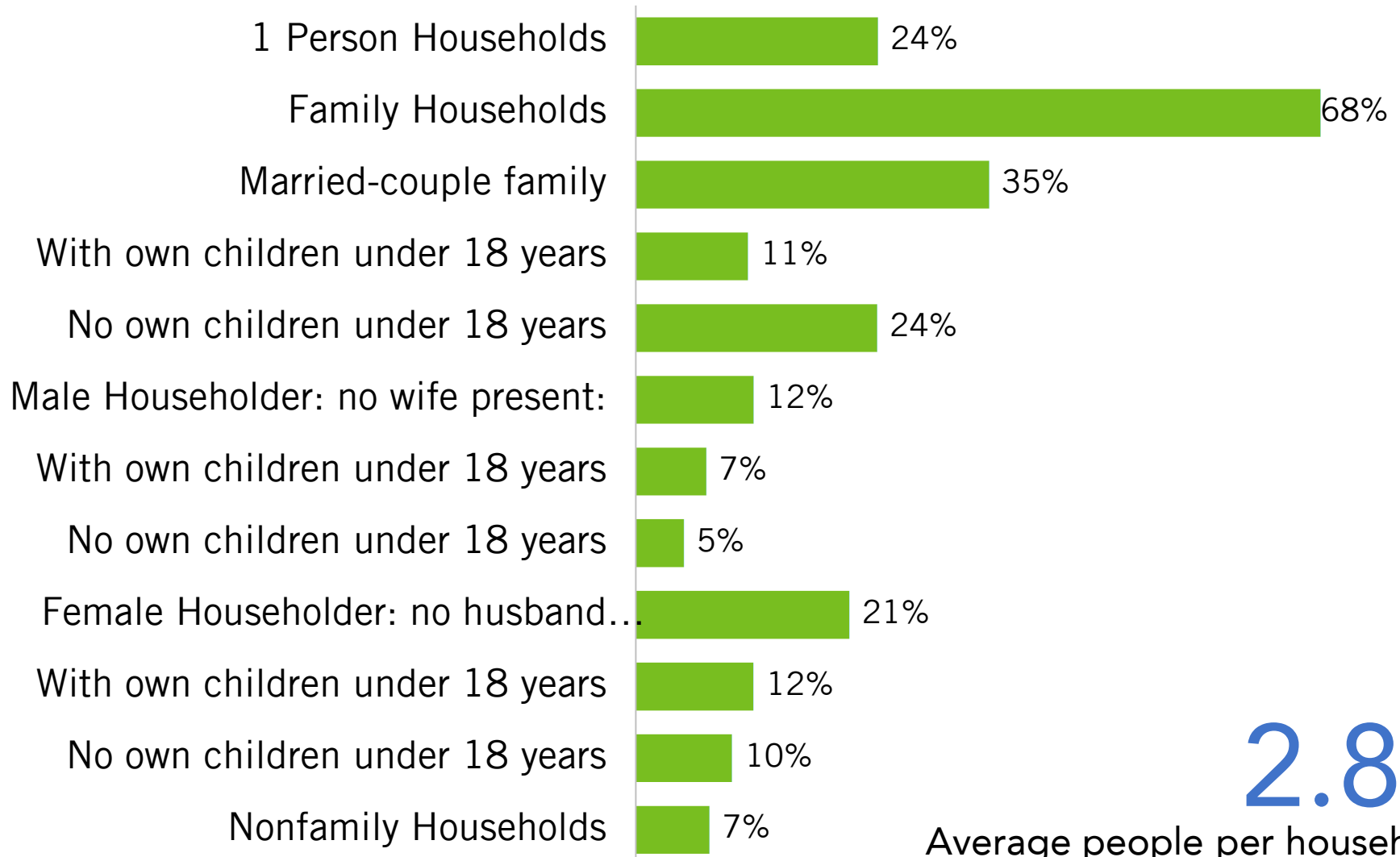
2021 ESTIMATED HOUSING UNITS BY TENURE



\$257,424
average housing unit value

DISCOVER: Custom Trade Area

Our Research



2.80

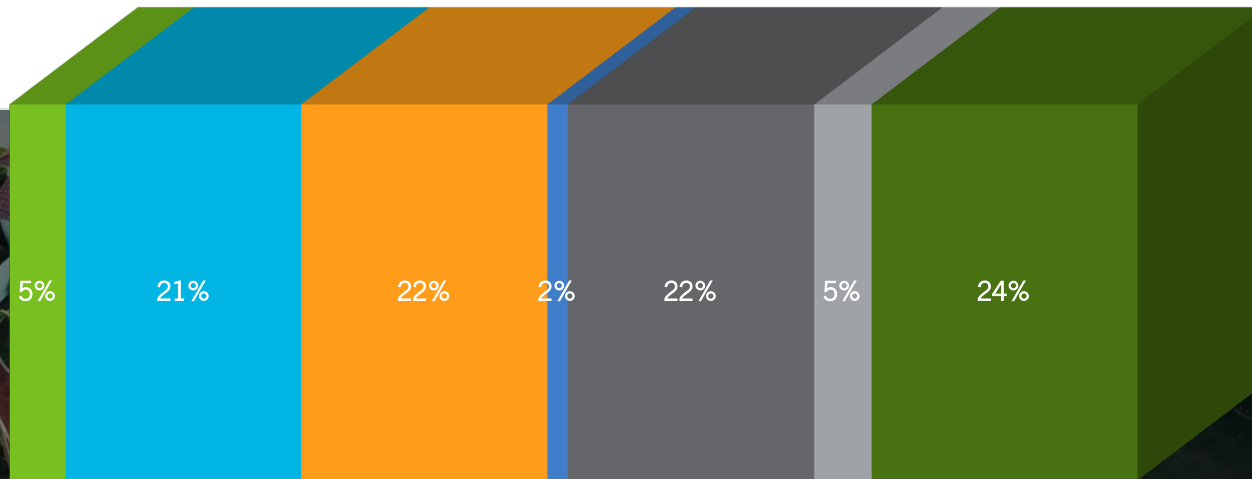
Average people per household

DISCOVER: Custom Trade Area

Our Research

5,270
daytime population

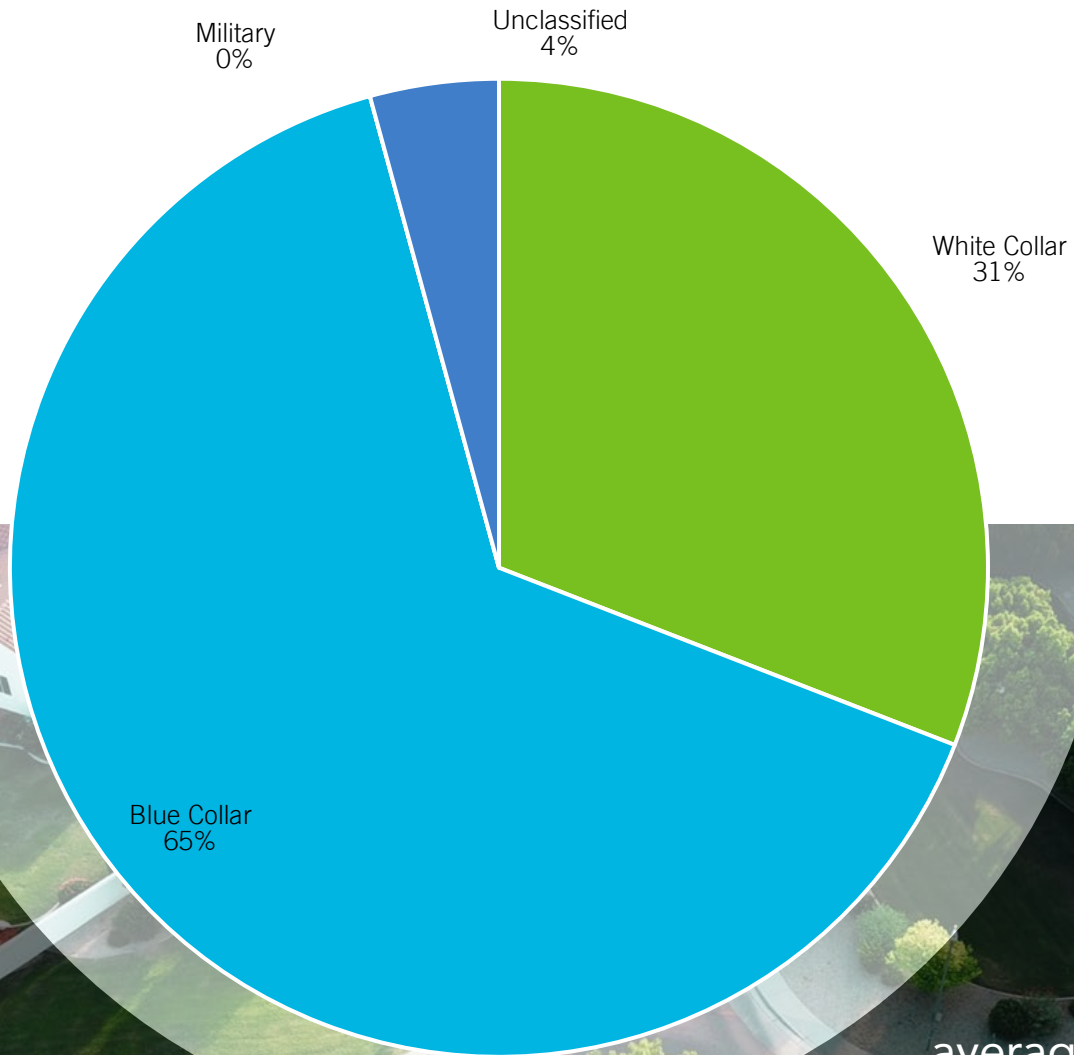
■ Children at home ■ Retired/Disable persons ■ Homemakers ■ Work at Home





DISCOVER: Custom Trade Area

Our Research



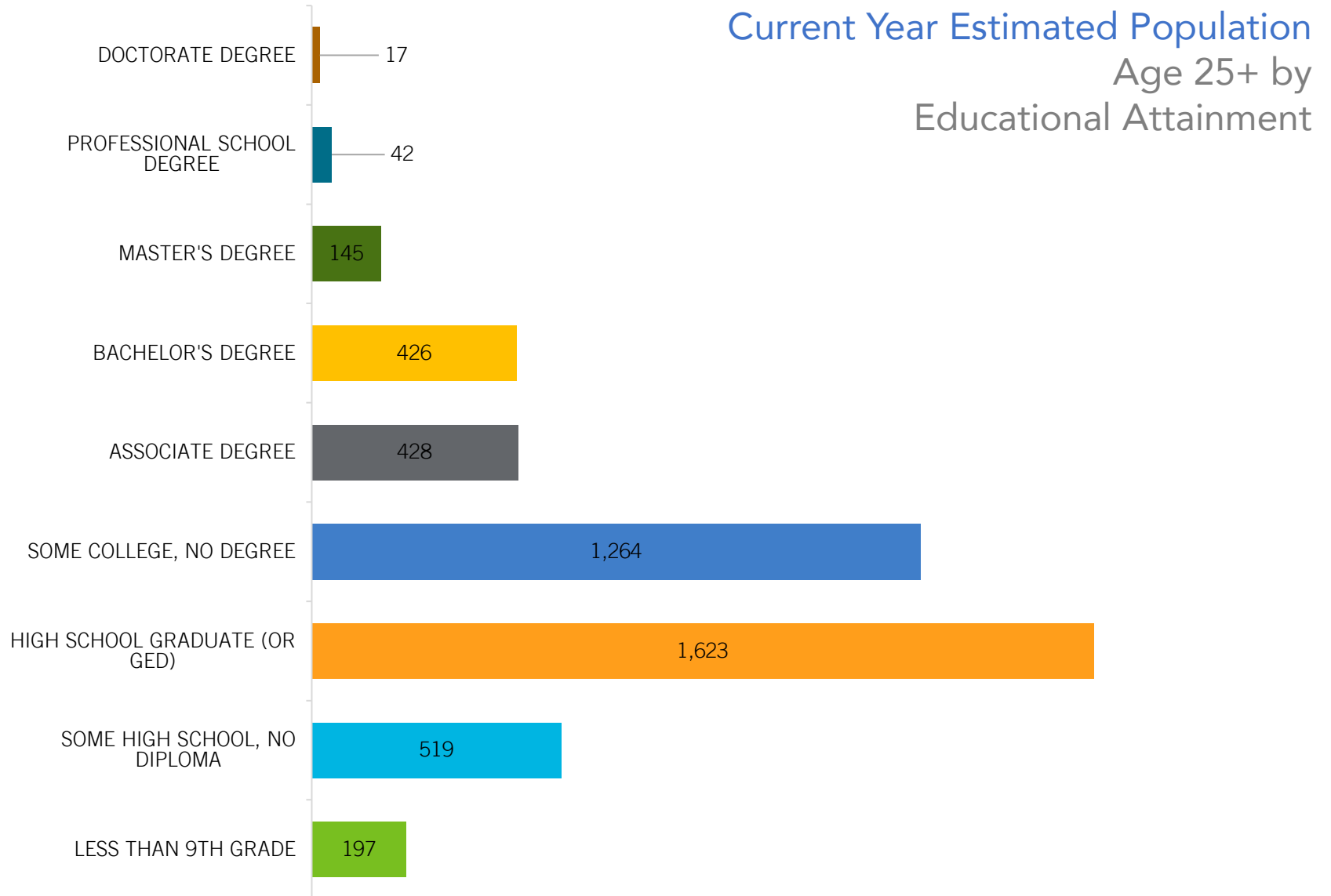
\$49,802

average employee salary



DISCOVER: Custom Trade Area

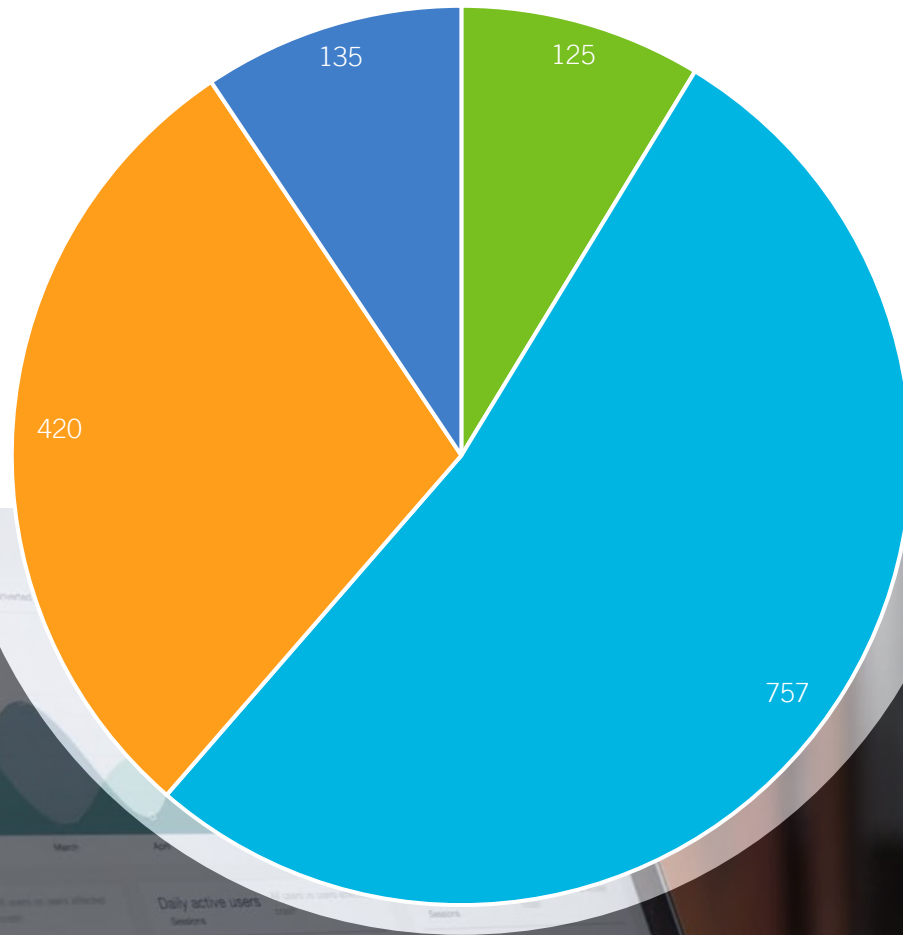
Our Research









CUSTOM TRADE AREA

Our Research



CURRENT YEAR
ESTIMATED POPULATION
BY ENROLLMENT

-  Nursery school/preschool
-  High School
-  Kindergarten/Elementary School
-  College/Graduate/Professional school



DISCOVER

Research & Analytics

When asked to describe “Who is Colville Tribe, WA?” often the community leadership describes themselves rather than the dominate personality of the area. Understanding consumer shopping patterns based on personality allow Retail strategies to better align the retail prospects with the purchasing patterns.

Selection of the variables used to identify consumer markets begins with data that includes household characteristics such as single person or family, income, relationships (married or multigenerational), and tenure; personal traits such as age, sex, education, employment, and marital status; and housing characteristics like home value or rent, type of housing (single family, apartment, town house, or mobile home), seasonal status, and owner costs relative to income. In essence, any characteristic that is likely to differentiate consumer spending and preferences is assessed for use in identifying consumer markets.



4

Lifestyle Reports allow **BIG DATA** to be summed up into a simple narrative on the personality of the majority of your households.

ESRI Tapestry Segmentation is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify US neighborhoods. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Internally homogenous, externally heterogeneous market segments depict consumers' lifestyles and life stages. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local geography to create a classification model with 67 distinct, behavioral market segments.



TAPESTRY SEGMENTATION

Research & Analytics

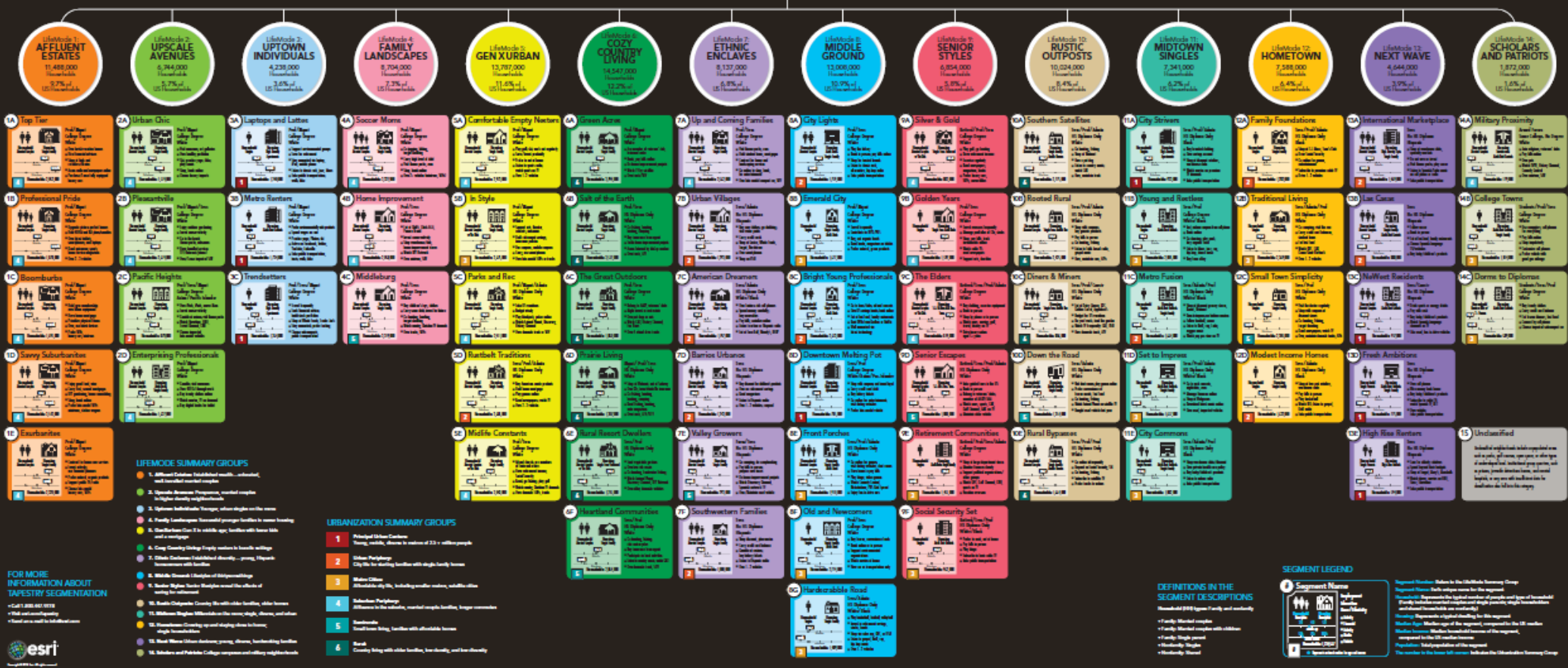
TAPESTRY SEGMENTATION

The Fabric of America's Neighborhoods



UNITED STATES OF AMERICA

Total Population: 314,468,000 Median Income: \$51,000 Home Ownership Rate: 64%
Total Households: 118,979,000 Median Net Worth: \$71,000 Average Household Size: 2.58
Median Age: 37.6 Diversity Index: 42.1 Home Value: \$177,000



FOR MORE INFORMATION ABOUT TAPESTRY SEGMENTATION

+1 617 325 6173
+1 800 424 6463
+1 800 424 6463

esri

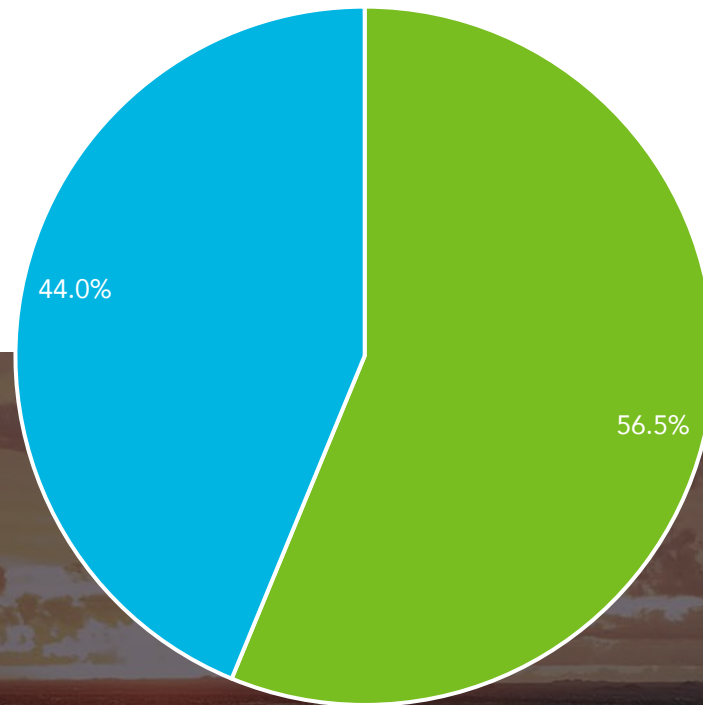


TAPESTRY SEGMENTATION

Research & Analytics



3 - Mile Radius Chevron



■ Family Foundations (12A) ■ Down the Road (10D)



LifeMode Group: Hometown

Family Foundations

12A

Households: 1,299,600

Average Household Size: 2.71

Median Age: 39.6

Median Household Income: \$43,100

WHO ARE WE?

Family and faith are the cornerstones of life in these communities. Older children, still living at home, working toward financial independence, are common within these households. Neighborhoods are stable: little household growth has occurred for more than a decade. Many residents work in the health-care industry or public administration across all levels of government. Style is important to these consumers, who spend on clothing for themselves and their children as well as on smartphones.

OUR NEIGHBORHOOD

- *Family Foundations* residents are a mix of married couples, single parents, grandparents, and children, young and adult.
- Average household size is slightly higher at 2.71.
- Neighborhoods are found in principal cities of major metropolitan areas throughout the South and West.
- More than two-thirds are homeowners living in single-family houses built before 1970.
- Nearly three-fourths of all households have one or two vehicles at their disposal; average commute time is slightly higher.

SOCIOECONOMIC TRAITS

- More than half have either attended college or obtained a degree; one-third have only finished high school.
- Labor force participation rate is slightly lower at 58% as workers begin to retire.
- Over one-third of households currently receive Social Security benefits; just under a quarter draw income from retirement accounts.
- A strong focus is on religion and character.
- Style and appearance are important.



MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Baby and children’s products are the primary purchases made by *Family Foundations* residents.
- Shop at discount stores, such as Marshalls, Kmart, dollar stores, and take advantage of savings at Sam’s Club.
- Many have no financial investments or retirement savings.
- Magazines, particularly focusing on health and children, are popular.
- Enjoy listening to urban format radio.
- Favorite entertainment sources include television: subscribe to premium cable channels and own three to four TVs.
- Connected, using the internet primarily for entertainment, chat rooms, and online gaming.

HOUSING

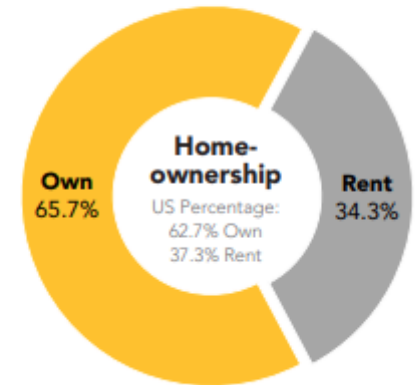
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau’s American Community Survey.



Typical Housing:
Single Family

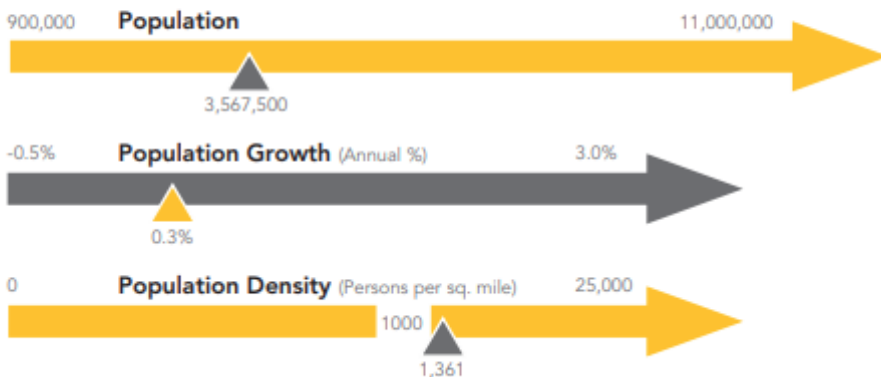
Median Value:
\$116,600

US Median: \$207,300



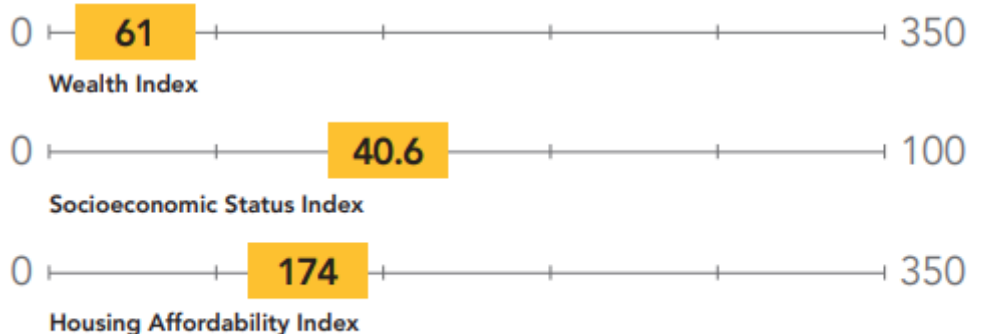
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.

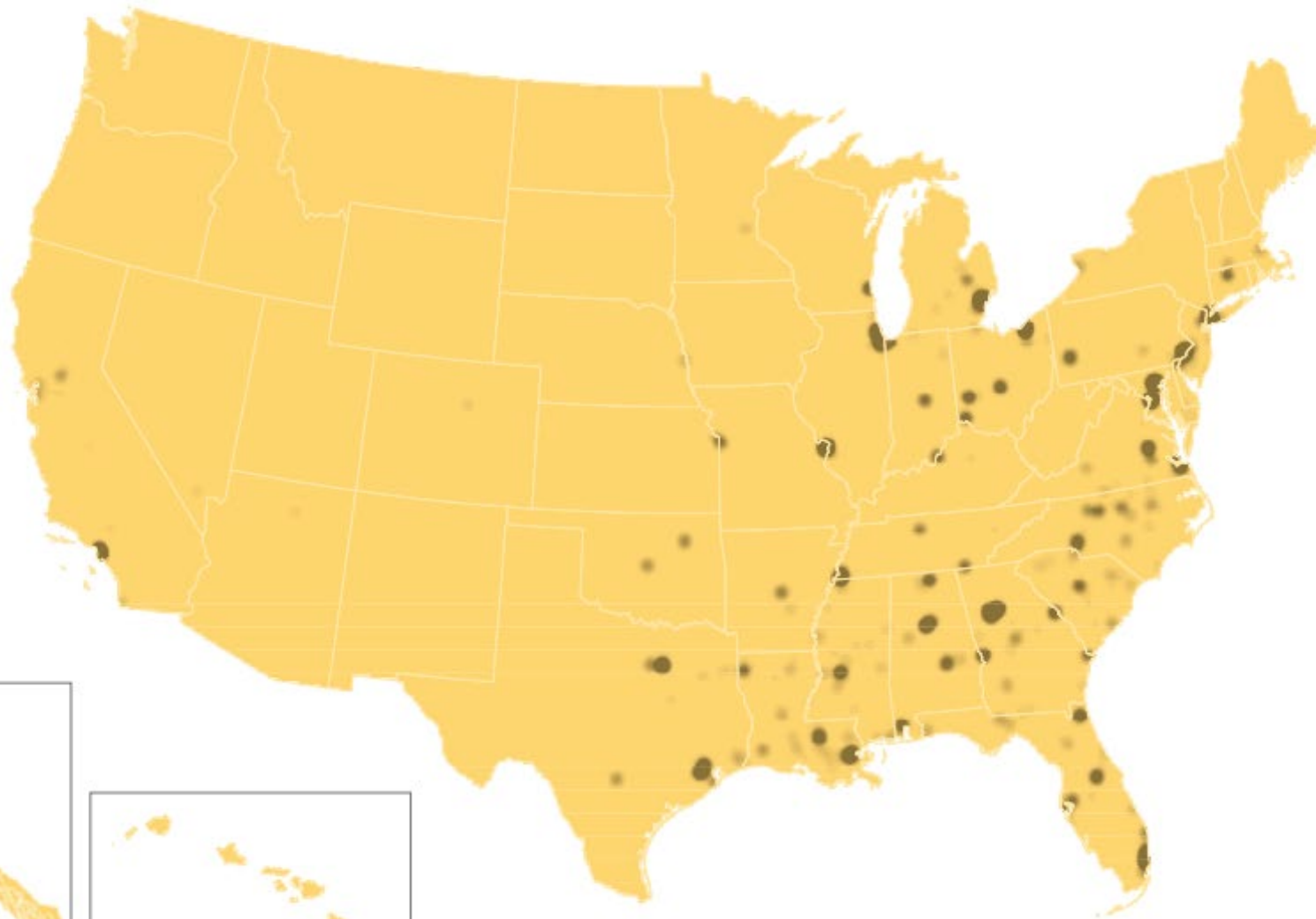
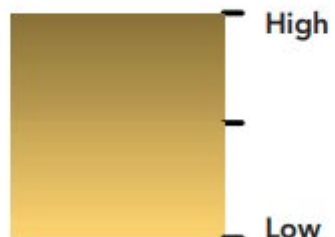


Family Foundations



SEGMENT DENSITY

This map illustrates the density and distribution of the *Family Foundations* Tapestry Segment by households.



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info@esri.com
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esri

THE
SCIENCE
OF
WHERE®



LifeMode Group: Rustic Outposts

Down the Road

10D

Households: 1,406,700

Average Household Size: 2.76

Median Age: 35.0

Median Household Income: \$38,700

WHO ARE WE?

Down the Road is a mix of low-density, semirural neighborhoods in large metropolitan areas; half are located in the South, with the rest primarily in the West and Midwest. Almost half of householders live in mobile homes; more than two-fifths live in single-family homes. These are young, family-oriented consumers who value their traditions. Workers are in service, retail trade, manufacturing, and construction industries, with higher proportions in agriculture and mining, compared to the US.

OUR NEIGHBORHOOD

- Nearly two-thirds of households are owned.
- Family market, primarily married couples or single-parent households (Index 145).
- Close to half of all households live in mobile homes (Index 780).
- Four-fifths of households were built in 1970 or later.
- About 32% of homes are valued under \$50,000.

SOCIOECONOMIC TRAITS

- Education completed: 36% with a high school diploma only, 41% with some college education or a degree.
- Labor force participation rate is 59.0%, slightly lower than the US.
- Family-oriented, outgoing consumers; they place importance on preserving time-honored customs.



MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Purchased a used vehicle in the past year, likely maintaining the vehicle themselves.
- Routinely stop by the convenience store to purchase gas, groceries, and snacks.
- Participate in fishing and hunting.
- Use the internet to stay connected with friends and play online video games.
- Listen to the radio, especially at work, with a preference for rap, R&B, and country music.
- Enjoy programs on Investigation Discovery, CMT, and Hallmark, typically watching via satellite dish.
- Often prepare quick meals, using packaged or frozen dinner entrees.
- Favorite fast food: burgers and pizza.
- Frequent Walmart Supercenters, Walgreens, dollar stores, Kmart, and Big Lots for all their shopping needs (groceries, clothing, pharmacy, etc.).

HOUSING

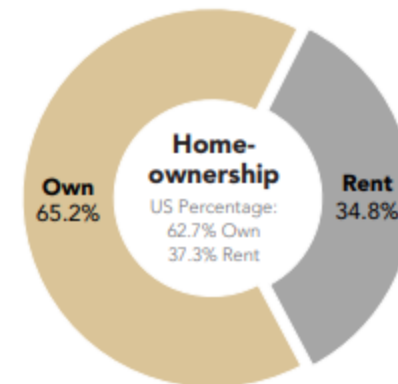
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
 Mobile Homes;
 Single Family

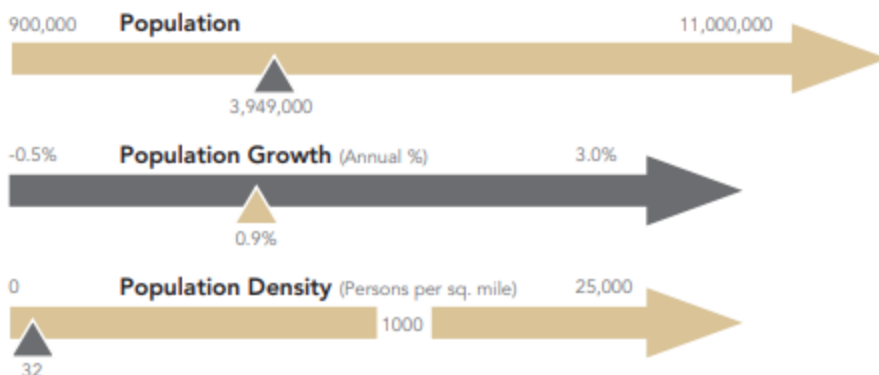
Median Value:
 \$89,800

US Median: \$207,300



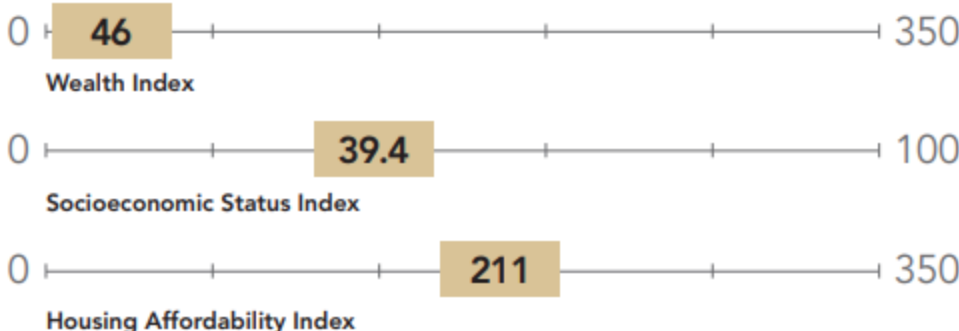
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

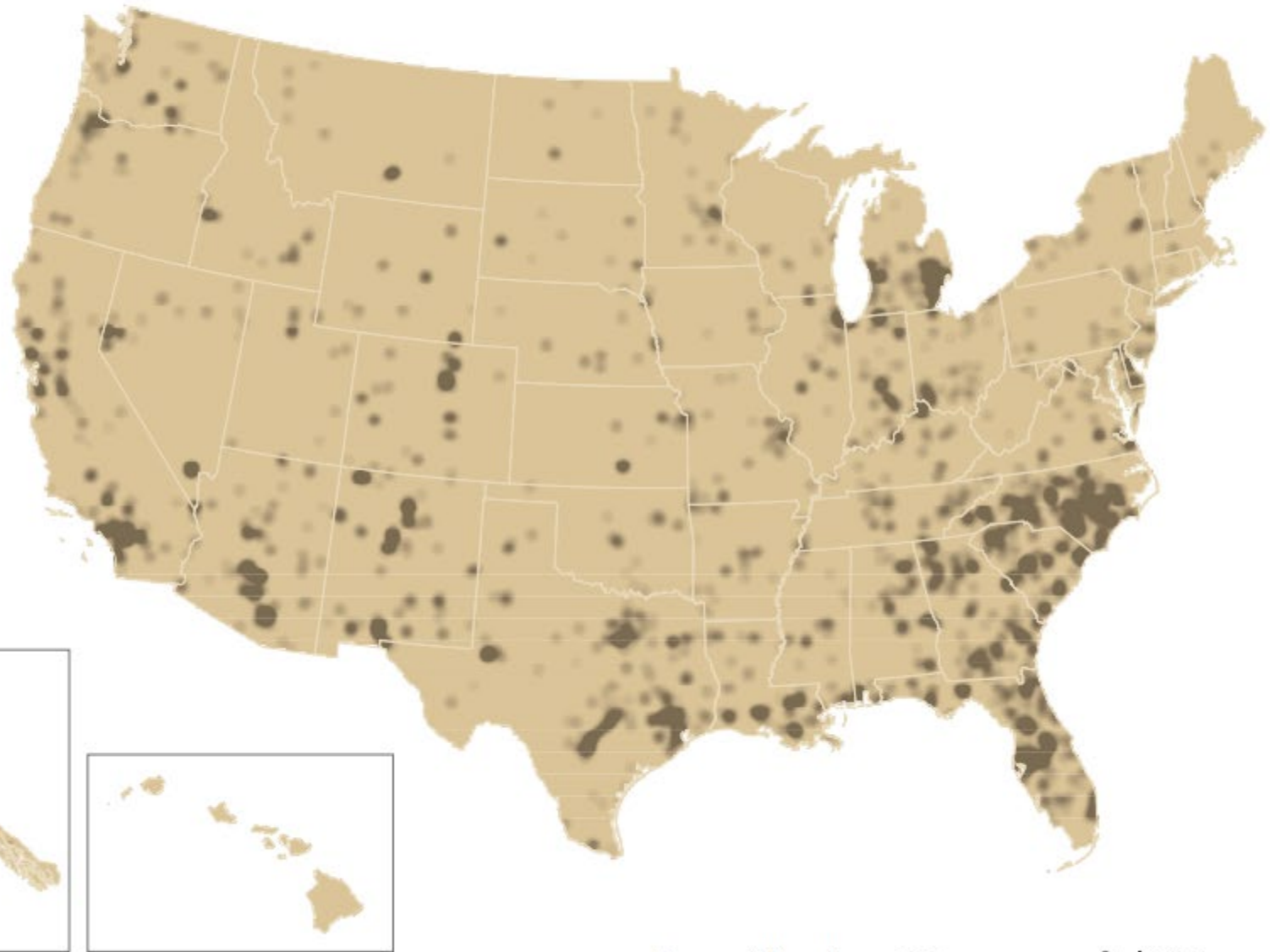
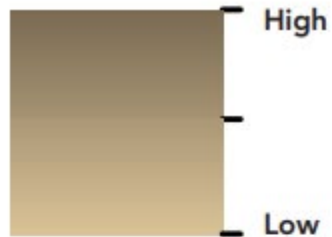
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Down the Road* Tapestry Segment by households.





DISCOVER

GAP Analysis

Retail Strategies uses STI:PopStats as our provider of the Consumer Demand and Supply by Establishment (or GAP) information. Several demographers provide the data in a variety of ways. Following are the sources and methodologies used by STI:PopStats and Retail Strategies to draw conclusions for you.

The market supply data is derived from annual retail sales and expenditures from the source data. The source for market supply is U.S. Census Bureau's monthly and annual Census of Retail Trade (CRT) Reports; U.S. Census Bureau's Economic Census. The source for the establishment is Bureau of Labor Statistics (BLS). The consumer demand data by establishment is derived from the BLS Consumer Expenditure Survey (CE).

The difference between demand and supply represents the opportunity gap or surplus available for each merchandise line in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that merchandise line. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

5

The **GAP Analysis** helps us uncover the number of dollars being spent outside of the community on an annual basis from a categorical perspective.

Industries for the consumer expenditures survey are categorized and defined by the North American Industry Classification System (NAICS). Retail Strategies has narrowed down the categories to only those with real estate growth potential based on national trends.

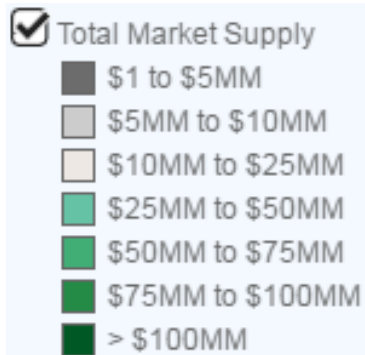
Data is rarely perfect, but with proper analysis can get us a lot closer to the answer than we would be without it. This is one of several tools used to identify focus categories for recruitment. Our focus is more on the category than the actual dollar amounts.



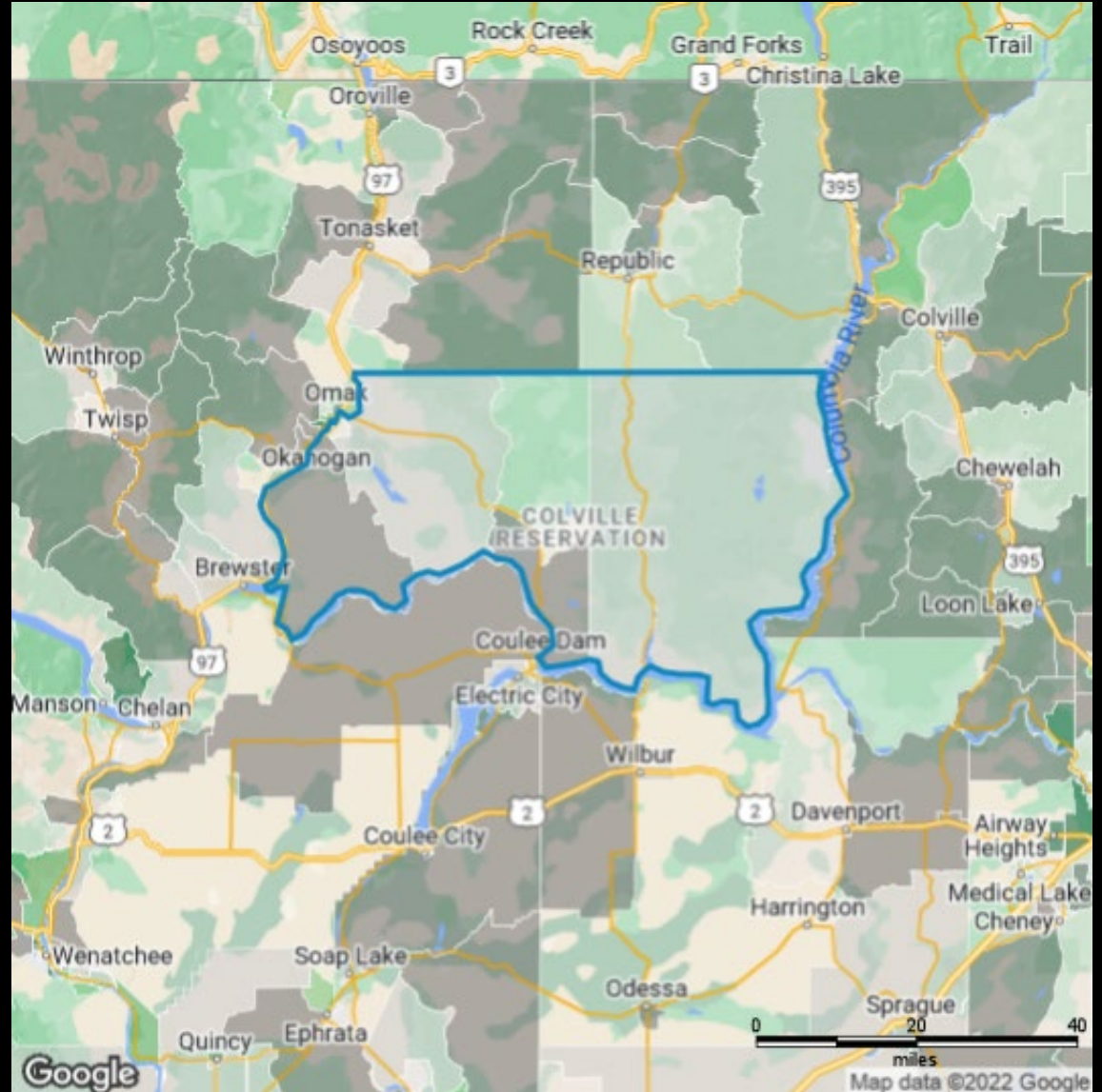
CUSTOM TRADE AREA

Total Market Supply

This represents the amount captured by businesses located in the defined trade area. By block group the areas with darker green captured more dollars than the gray areas.



Total Market Supply
\$38,686,630










CUSTOM TRADE AREA

Total Market Demand

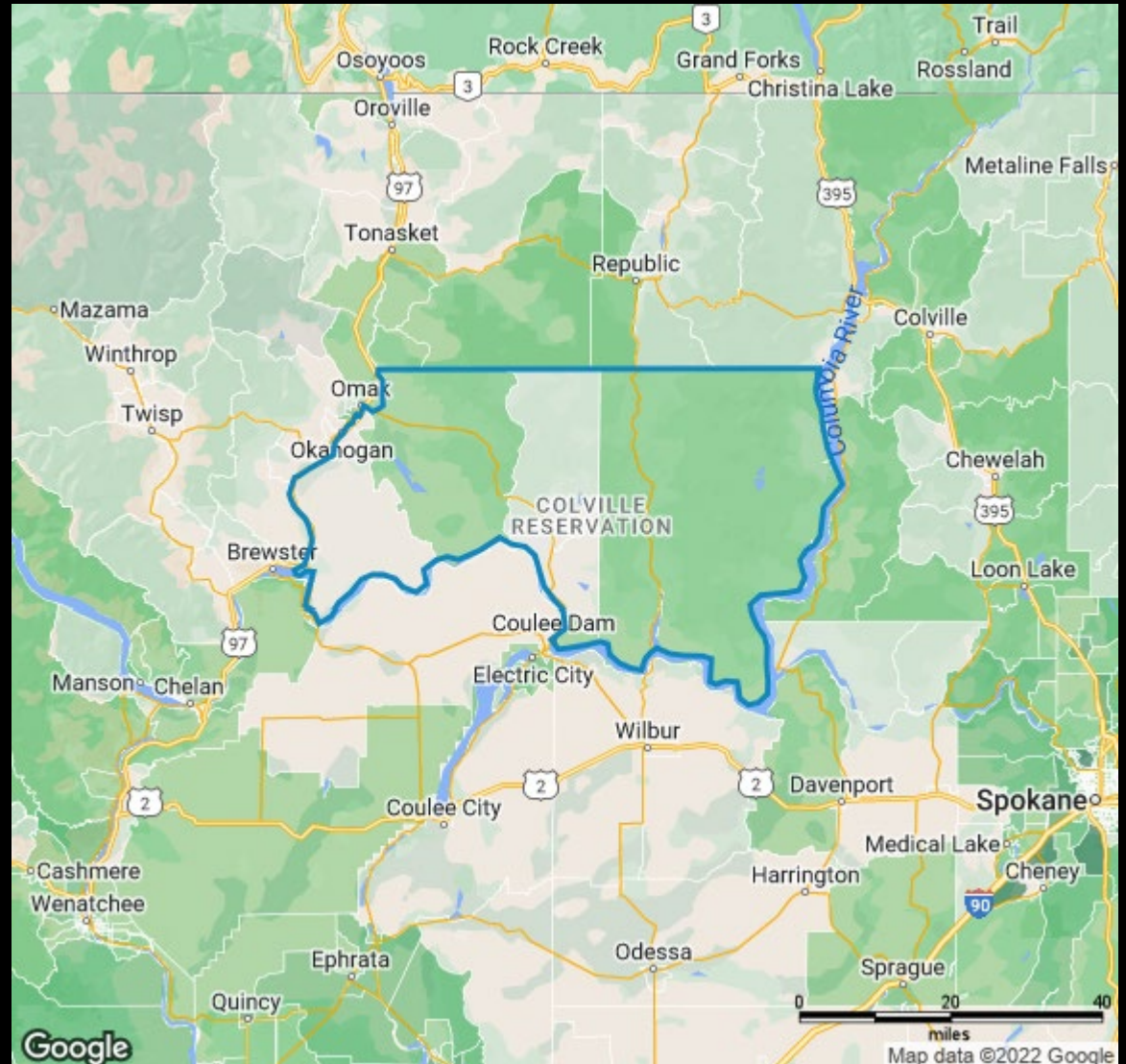
This represents the amount spent by consumers located in the defined trade area. By block group the areas with darker green captured more dollars than the gray areas.

Total Consumer Demand

-  \$1 to \$5MM
-  \$5MM to \$10MM
-  \$10MM to \$25MM
-  \$25MM to \$50MM
-  \$50MM to \$75MM
-  \$75MM to \$100MM
-  > \$100MM

Total Market Demand

\$143,752,459





CUSTOM TRADE AREA

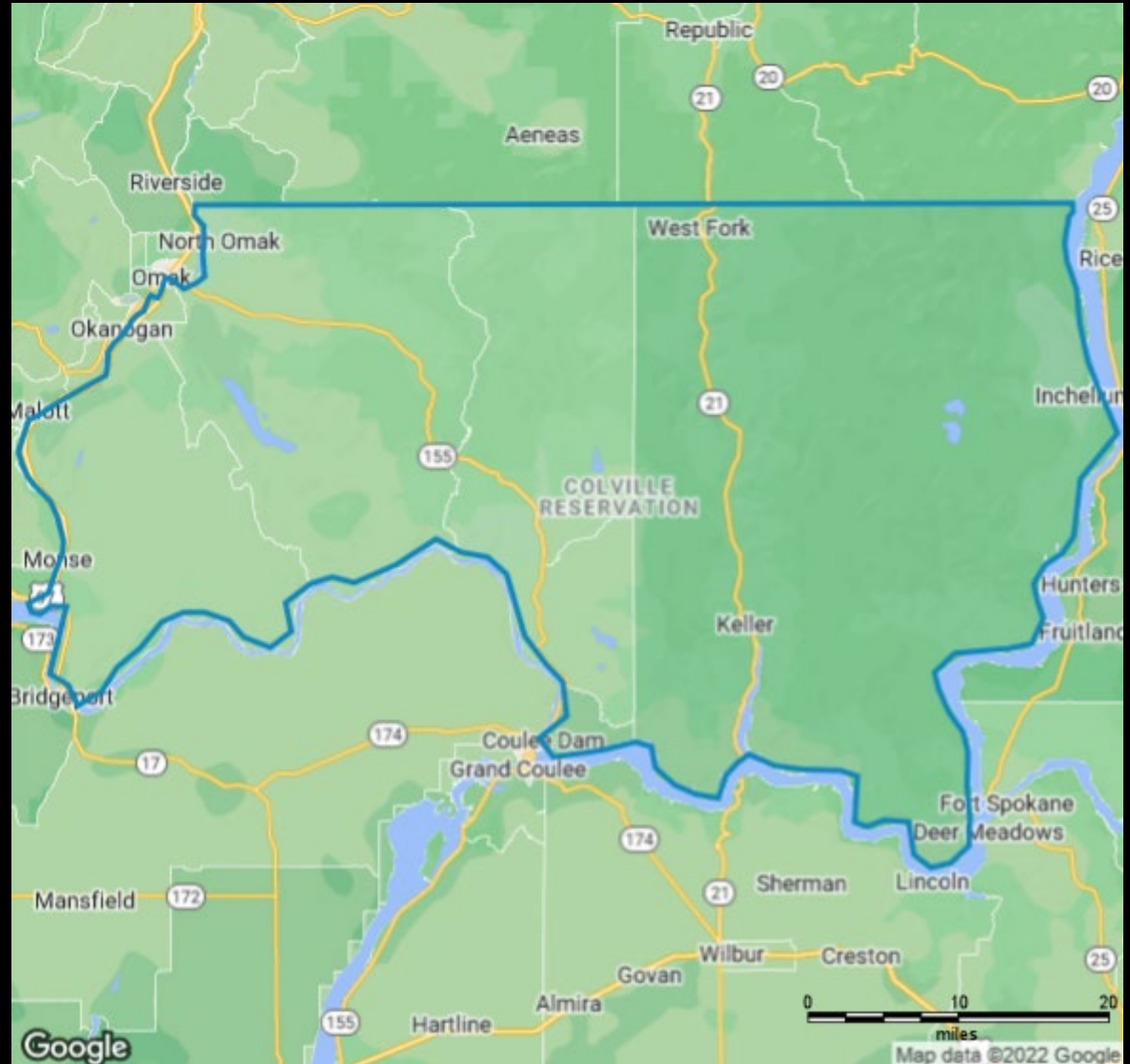
Opportunity Gap

This means more people purchase items outside of the defined trade area than in the defined trade area for their consumer goods and services. Finding the specific categories where they are leaving the market is the key. Dark gray shows block groups of retail synergy capturing those dollars. This is where our focus will be to place new retailers and restaurants.



Total Market leakage of

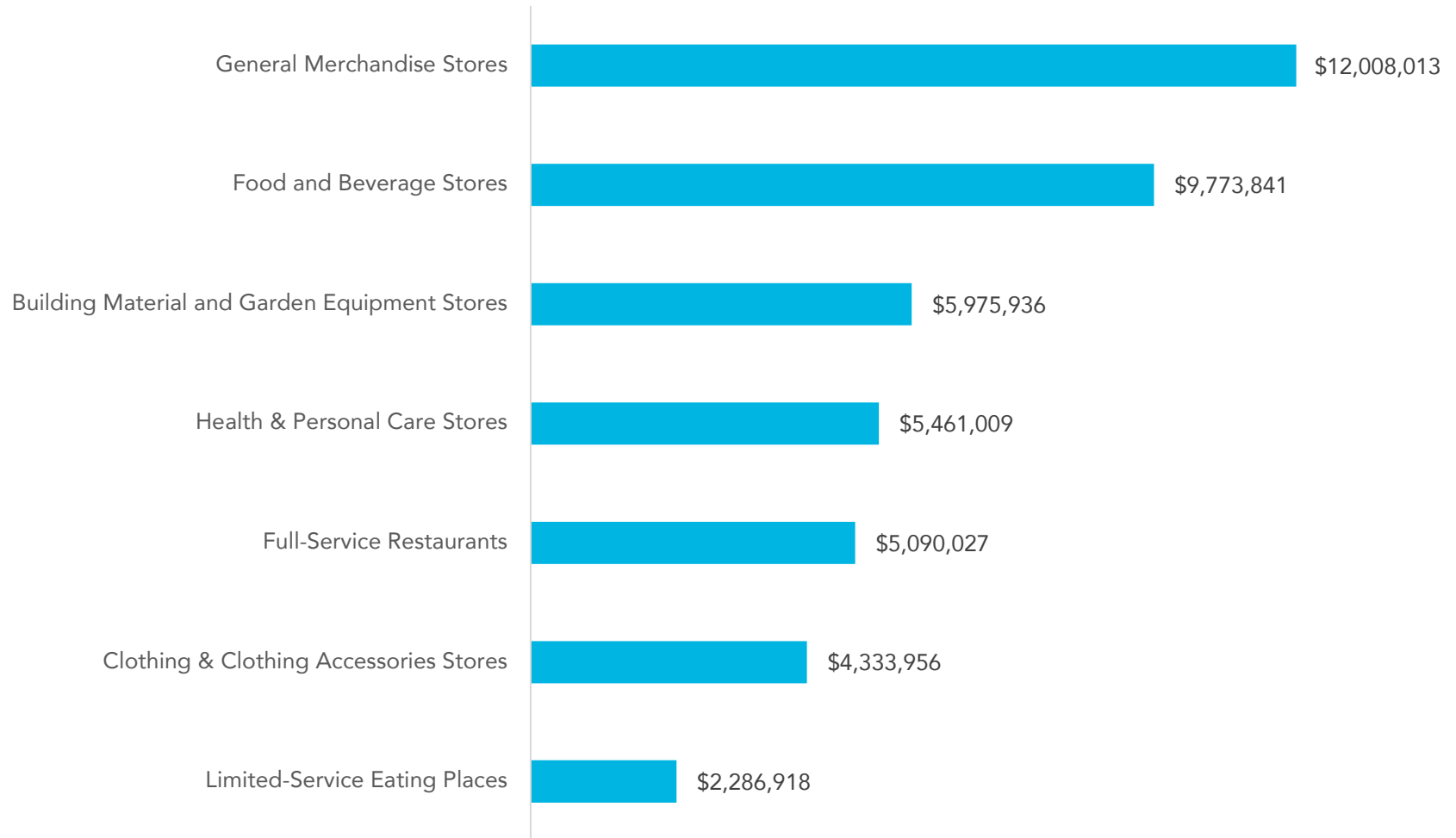
\$105,065,829





CUSTOM TRADE AREA

Leakage



DISCOVER

Peer Analysis

Walmart 10 - Minute Drive Time

City	State	Residential Pop	Employed Daytime Pop	Median HH Income	Market Supply
Okanogan County	WA	7,246	8,694	\$48,356	\$162,419,597
Woodland	WA	10,834	11,688	\$71,196	\$110,436,036
Ephrata	WA	10,578	9,549	\$60,759	\$142,704,415
Chelan	WA	4,653	5,765	\$62,581	\$39,254,161
Colville	WA	6,246	11,293	\$46,253	\$658,451,187
Smeltonville	ID	4,780	6,433	\$37,410	\$59,875,257
Richfield	UT	9,963	10,648	\$48,090	\$166,978,856
Ephraim	UT	6,896	9,014	\$42,836	\$53,510,446



Retail Prospects

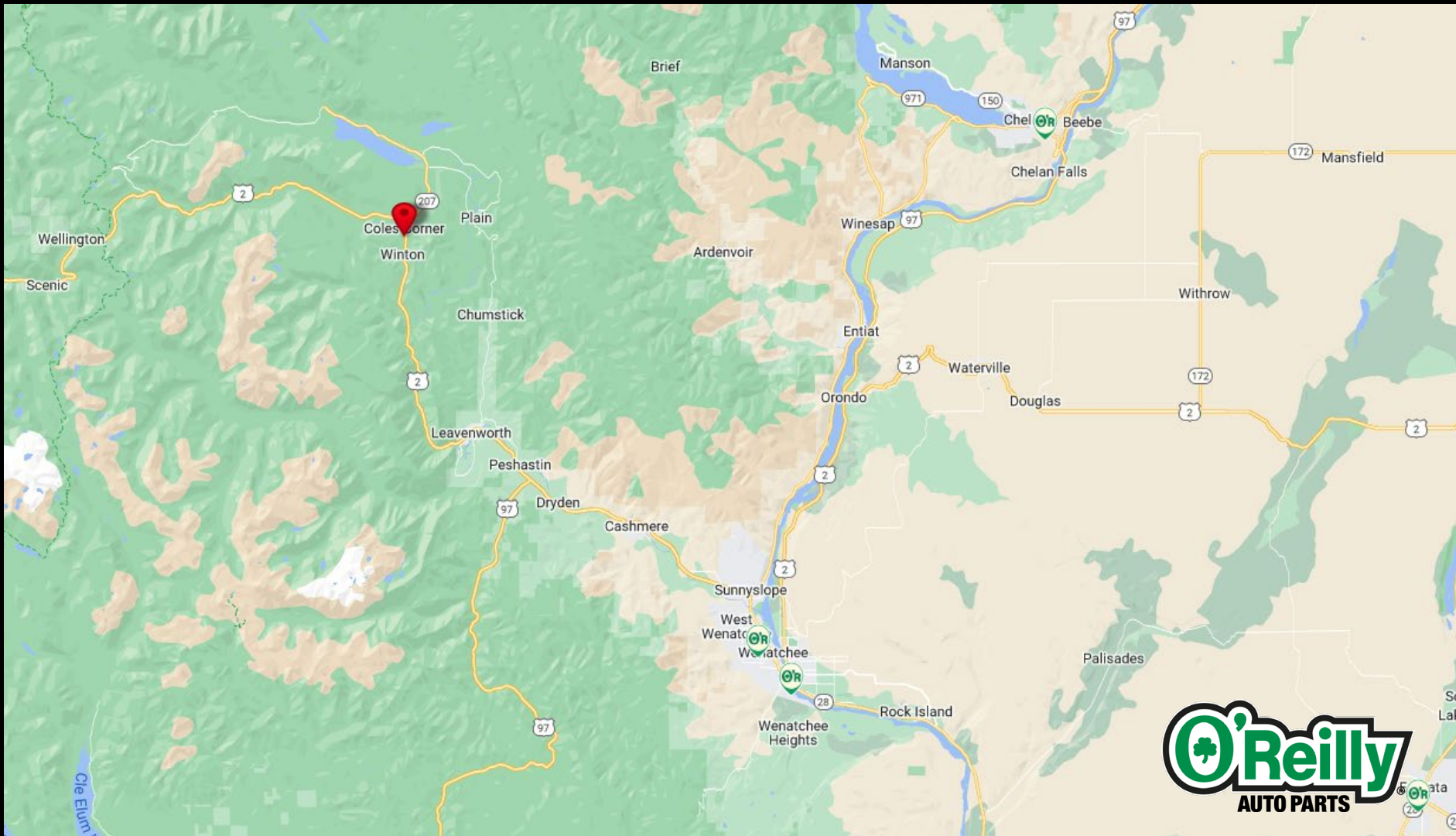
Retail Prospects



Little Caesars



Retail Prospects



Automotive

O'Reilly Auto Parts



site criteria

Min SF 6,500

Max SF 8,000

Current Store 5,439

Desired Locations 12/24 Months 5 / 10

Traffic Counts 30,000 VPD

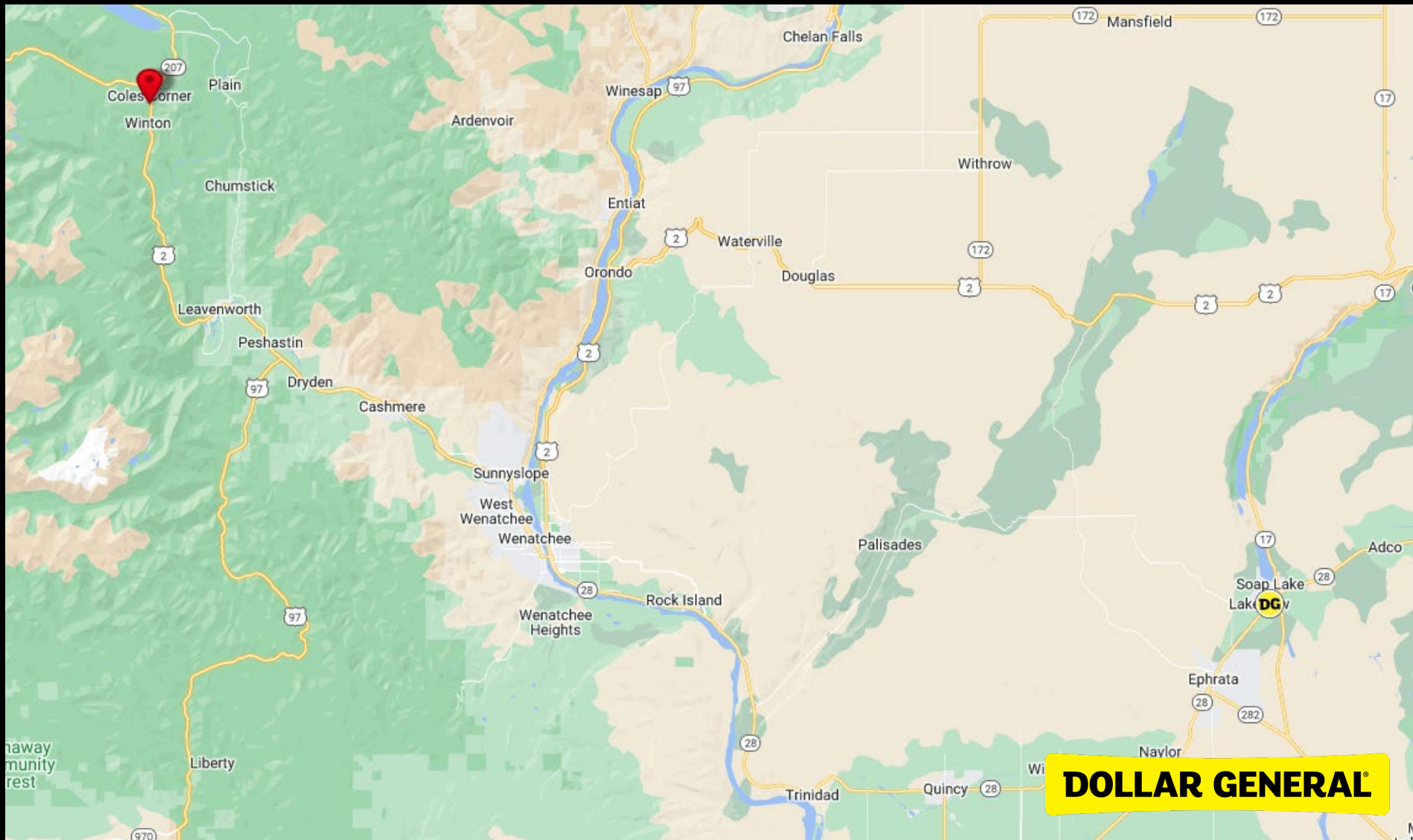
Customer Comments Population: Dense areas w/ auto mechanic businesses.

Facility Type/Other Demo Comments Free Standing, Neighborhood Strip, Regional Strip

Average Sales Volumes \$1,866,152

Number of Jobs 11

Retail Prospects



General Merchandise

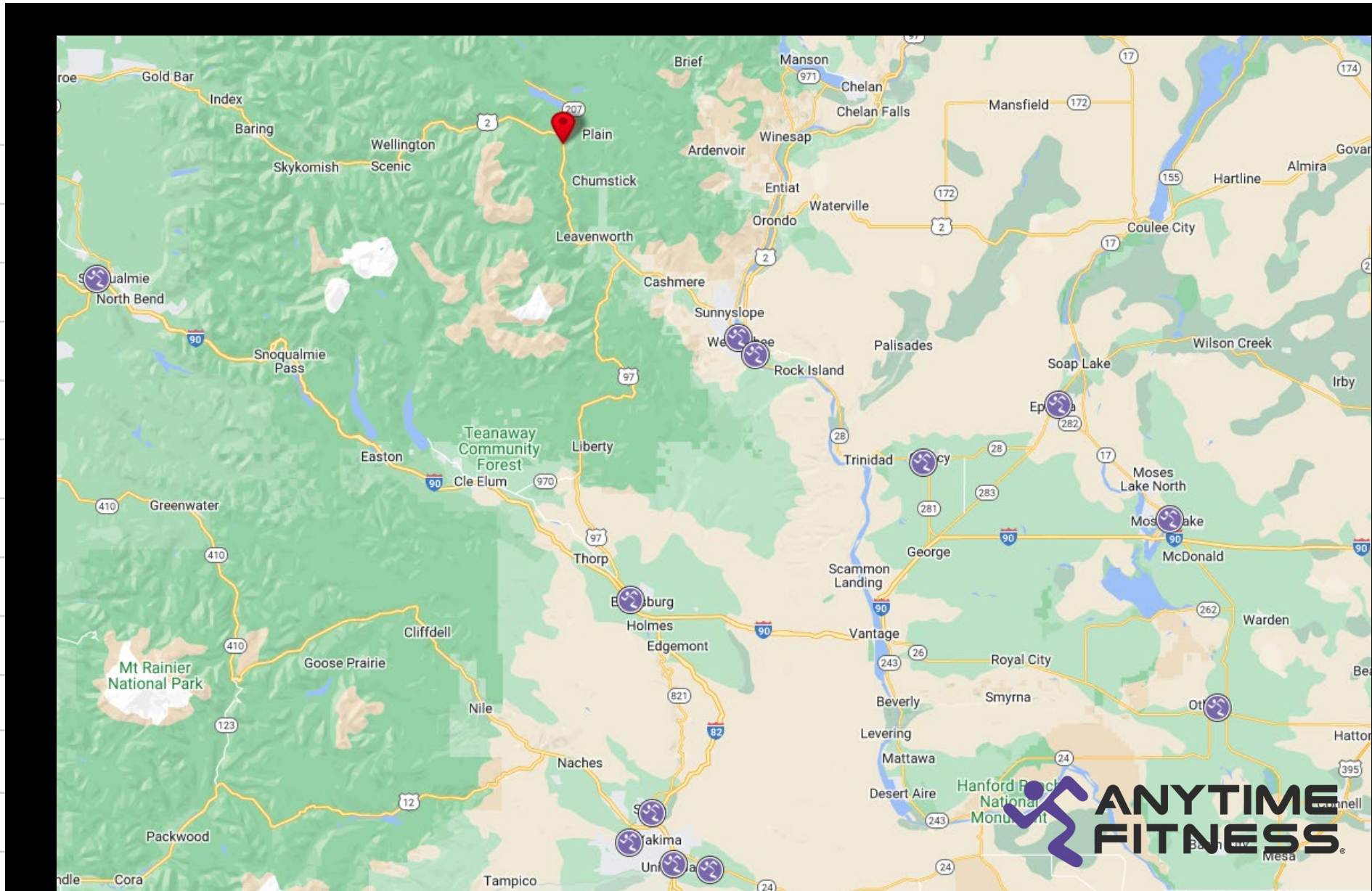
Dollar General



site criteria

Min SF	9,000
Max SF	12,000
Current Store	16,368
Desired Locations 12/24 Months	730 / 1460
Minimum Population	5,000
Traffic Counts	3,000 VPD
Average Household Income	\$75,000
Customer Comments	Median household income Less than \$75,000. Traffic flow - greater than 3,000 cars per day.
Facility Type/Other Demo Comments	Downtown, Free Standing, Neighborhood Strip, Regional Strip, Specialty Strip
Average Sales Volumes	\$1,695,381
Number of Jobs	9

Retail Prospects



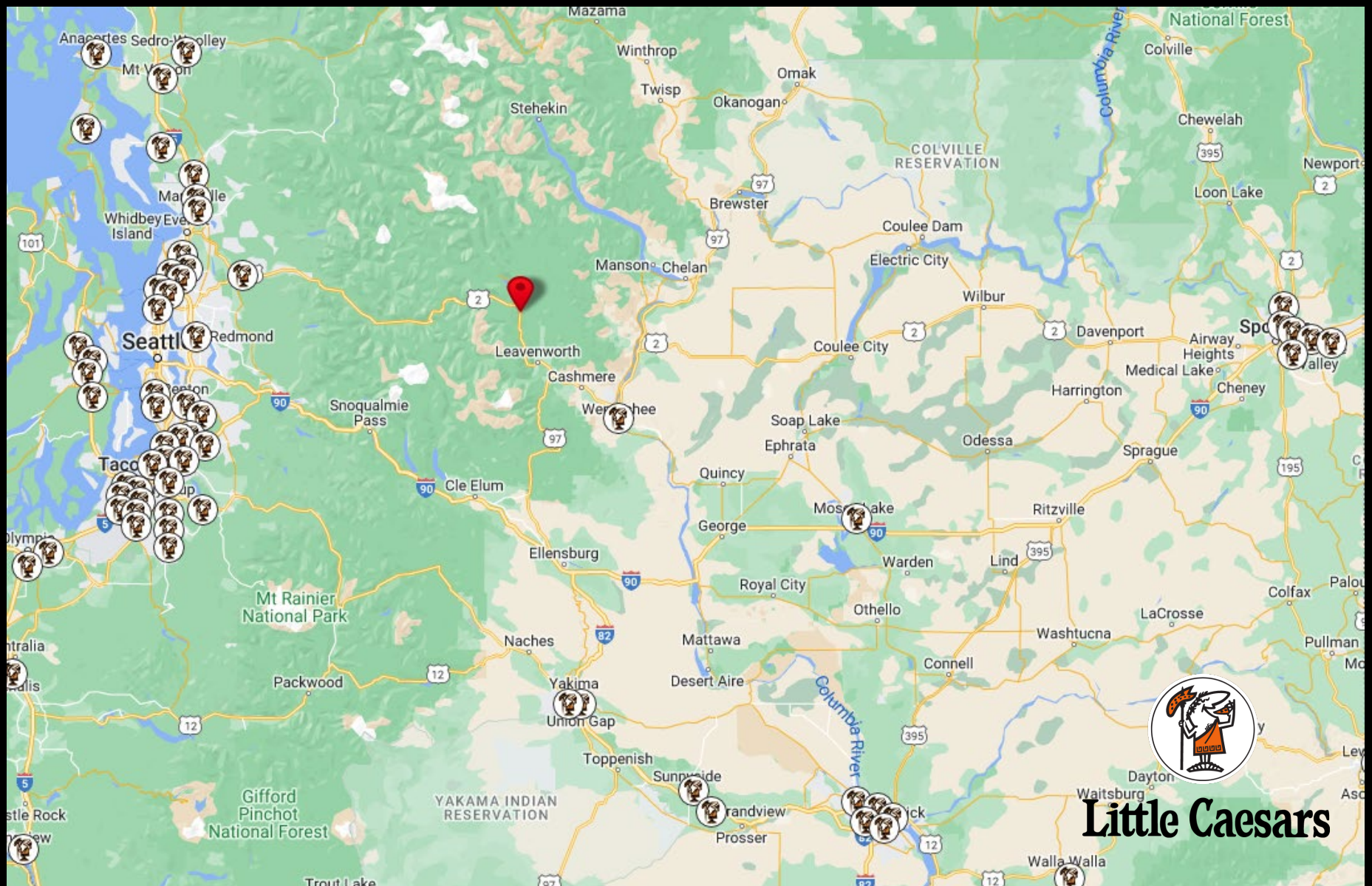
Anytime Fitness



site criteria

Min SF	3,000
Max SF	5,000
Current Store	4,520
Desired Locations 12/24 Months	125 / 250
Mile Radius Demographics	1
Minimum Population	25,000
Traffic Counts	25,000
Average Household Income	\$40,000
Customer Comments	25-55 age bracket with expendable income.
Facility Type/Other Demo Comments	Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Specialty Strip
Average Sales Volumes	\$320,796
Number of Jobs	2

Retail Prospects



Quick Service Restaurant

Little Caesars



site criteria

Min SF 415

Max SF 1,600

Current Store 4,083

Desired Locations 12/24 Months 50 / 100

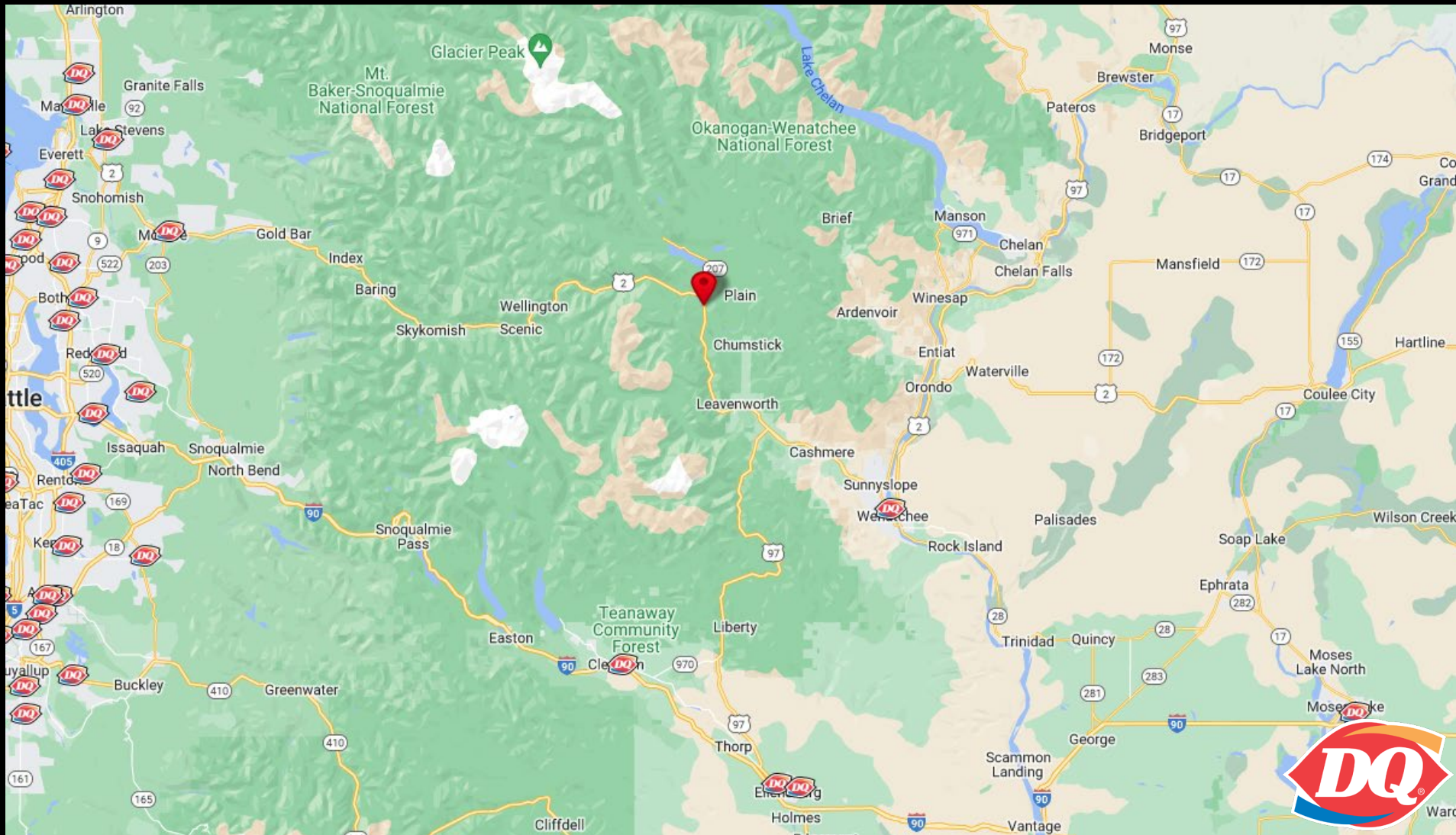
Facility Type/Other Demo
Comments

Any Facility, Campus Site, Downtown, Free Standing, Gas Station, Hotel Lobby, Kiosk, Lifestyle Center, Medical Center, Neighborhood Strip, Office Building, Outlet Mall, Power Center, Regional Mall, Regional Strip, Specialty Strip, Transit Terminal

Average Sales Volumes \$924,810

Number of Jobs 4

Retail Prospects



Quick Service Restaurant

Dairy Queen



site criteria

Min SF 2,000

Max SF 3,000

Current Store 4,361

Desired Locations 12/24 Months 65 / 130

Mile Radius Demographics -

Minimum Population 12,500

Traffic Counts 20,000

Average Household Income \$40,000

Customer Comments 20k Average daily traffic in front of location, prefer additional traffic on intersecting street. Residential population: 12,500{plus} w/in 5 minute drive time. Employees: 5,000{plus} w/in 5 minute drive time. Median HH Income: minimum \$40,000; prefer \$50

Facility Type/Other Demo Comments Free Standing, Neighborhood Strip, Regional Strip, Specialty Strip

Average Sales Volumes \$912,635

Number of Jobs 15



Real Estate Analysis

Real Estate Analysis

Purpose:

To identify and record the primary real estate opportunities within the market.

This analysis is performed by licensed real estate professionals.

Retail Academy professionals have reviewed the market's real estate to identify underexposed real estate assets. No retail expansion can take place without the right piece of real estate. The following slides describe the primary underexposed real estate sites and development zones in the market.



Retail Aerial



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Zone Analysis - Inchelium



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Zone Analysis - Keller



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Zone Analysis – Elmer City



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Zone Analysis – Coulee Dam



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Zone Analysis - Nespelem



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Zone Analysis - Okanogan



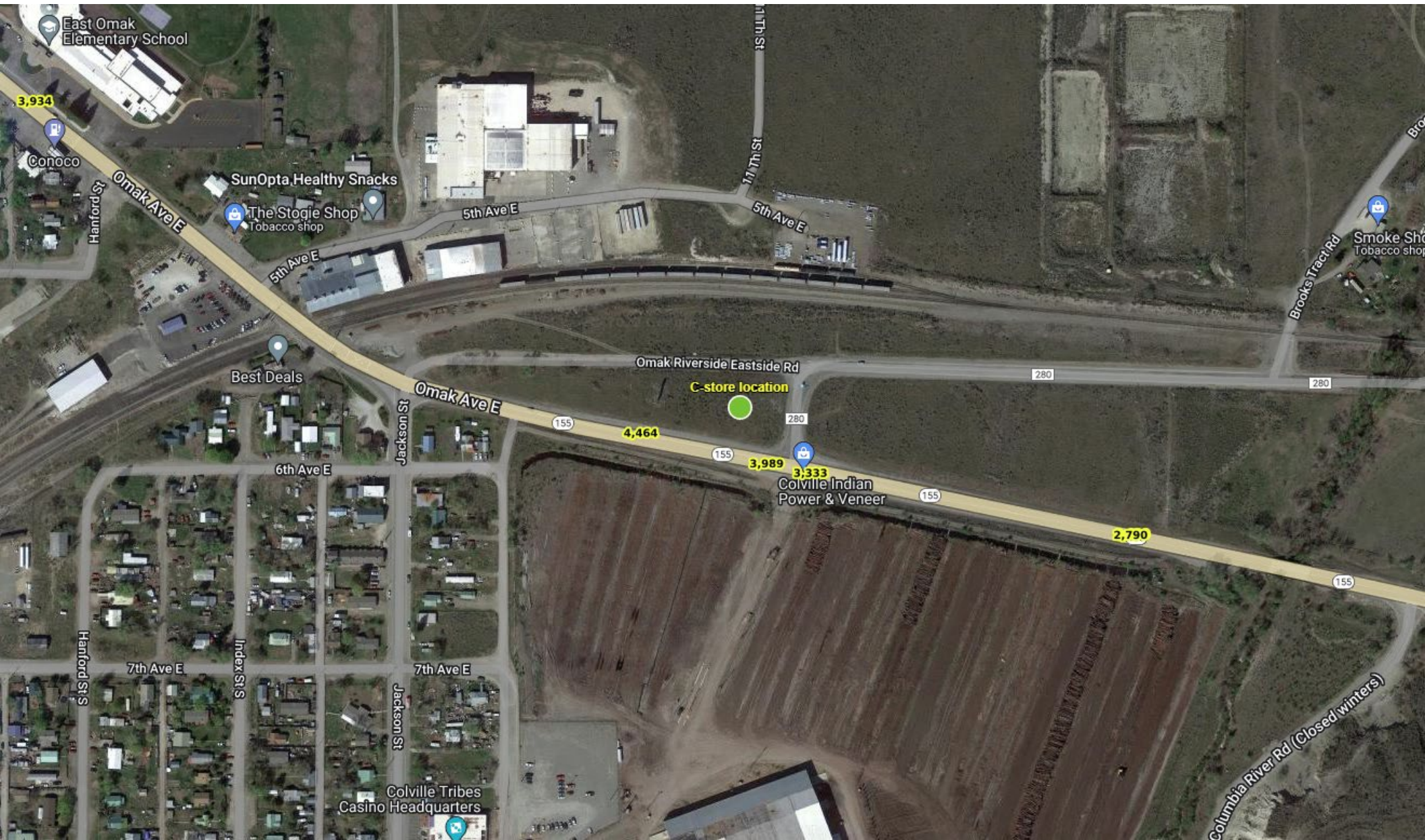
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Zone Analysis – Okanogan County



FOCUS RECRUITMENT

Zone Analysis - Omak





Thank you!

