



# TEN-YEAR ECONOMIC DEVELOPMENT STRATEGIC PLAN STEERING COMMITTEE

THE CITY OF AUBURN, WA

FEBRUARY 2016



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PROGRESS TO DATE

# WHAT WE'VE BEEN UP TO

- Trip 1
  - Kick-off meeting
  - Windshield tour
  - Interviews with city staff, Chamber, ADA – (6 interviews)
  - Focus group with real estate brokers & developers – (17 attendees)
- Trip 2
  - Focus area discussions – Downtown, Auburn Way South & North, Lakeland Hills
- Employer interviews – MultiCare
- Trip 3
  - Focus area discussions – Lea & West Hill, 15<sup>th</sup> St SW, IPZ, South A St
  - Interviews – community groups, superintendent
- Interviews with all City Council members
- Interviews with regional stakeholders
- Existing conditions analysis: in-progress
  - Demographics
  - Workforce & economy
  - Regulatory review
  - Baseline analysis
- Market capacity study: in-progress
  - Retail trade area definitions, interactive map, & data
  - Retail leakage & gap analysis
  - Office & industrial market capacity
- Perception survey: in progress





# 2

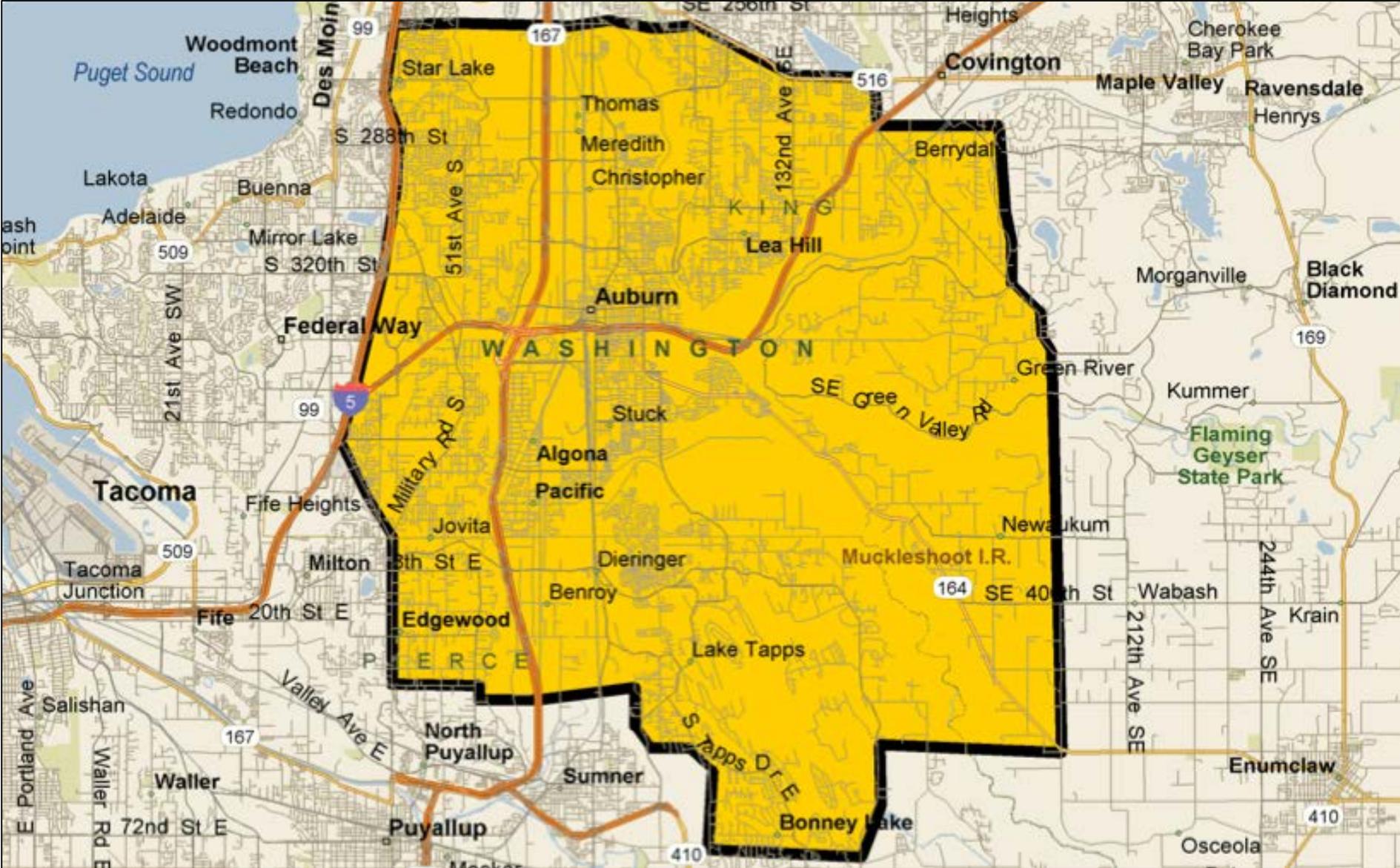
## PRELIMINARY RETAIL FINDINGS

# THE RETAIL TRADE AREA

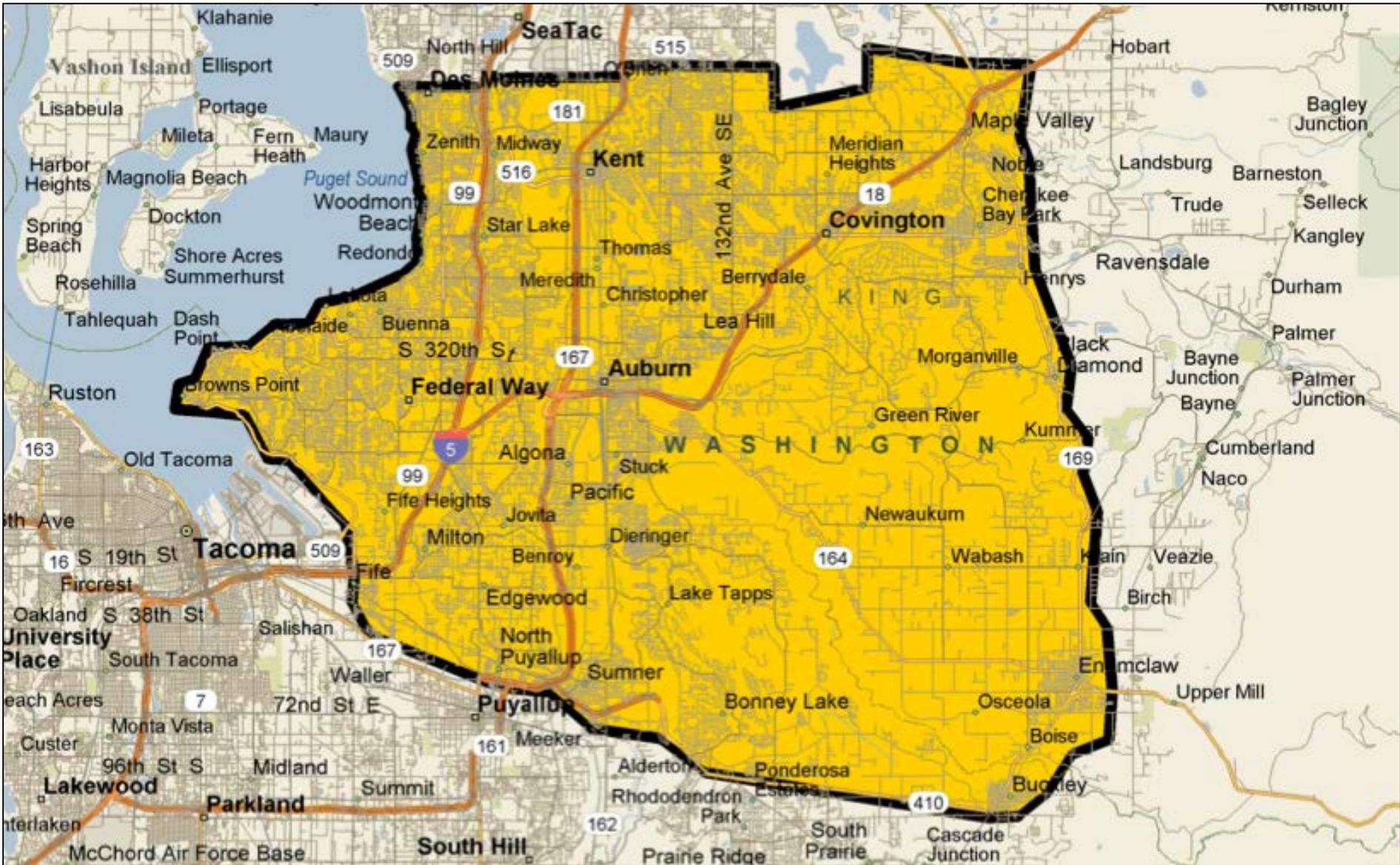
The largest distance consumers are willing to travel to purchase retail goods and services.



# Primary Retail Trade Area



# Retail Trade Area



# DEMOGRAPHIC PROFILING

We profile consumers for their unique attributes, including:

- Population
- Population Growth
- Race Classification
- Median Age
- Education
- Household Income
- Per Capita Income

# Primary Retail Trade Area Demographics

## Population

	2000	2010	2015 ESTIMATE	2020 PROJECTION
Primary Retail Trade Area	132,198	158,570	169,377	182,438

## Income

	2015 ESTIMATE
Average Household	\$85,395
Median Household	\$70,737
Per Capita	\$30,362

## Educational Attainment

	2015 ESTIMATE
Graduate or Professional	7.1%
Bachelor's Degree	17.1%
Associate Degree	11.5%
Some College, No Degree	25.1%
High School Graduate	23.6%
Some High School, No Degree	6.9%
Less than 9th Grade	4.1%

## Race Distribution

	2015 ESTIMATE
White	69.9%
Black or African American	5.2%
American Indian/Alaskan	1.9%
Asian	10.2%
Native Hawaiian/Islander	1.4%
Other Race	5.6%
Two or More Races	5.8%
Hispanic or Latino (of any race)	11.9%

## Age

GROUPS	2015 ESTIMATE
9 Years and Under	13.2%
10-14 Years	6.8%
15-24 Years	13.9%
25-34 Years	14.0%
35-44 Years	12.7%
45-54 Years	14.7%
55-64 Years	13.1%
65 Years and Over	11.5%
<b>DISTRIBUTION</b>	<b>2015 ESTIMATE</b>
Median Age	36.7

# Retail Trade Area Demographics

## Population

	2000	2010	2015 ESTIMATE	2020 PROJECTION
Retail Trade Area	440,871	501,397	525,778	559,238

## Income

	2015 ESTIMATE
Average Household	\$84,190
Median Household	\$68,107
Per Capita	\$30,881

## Educational Attainment

	2015 ESTIMATE
Graduate or Professional	7.9%
Bachelor's Degree	18.5%
Associate Degree	10.3%
Some College, No Degree	25.2%
High School Graduate	23.1%
Some High School, No Degree	6.7%
Less than 9th Grade	4.2%

## Race Distribution

	2015 ESTIMATE
White	66.2%
Black or African American	6.9%
American Indian/Alaskan	1.3%
Asian	11.6%
Native Hawaiian/Islander	1.7%
Other Race	6.3%
Two or More Races	6.1%
Hispanic or Latino (of any race)	13.1%

## Age

GROUPS	2015 ESTIMATE
9 Years and Under	13.3%
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55-64 Years	12.9%
65 Years and Over	11.9%
DISTRIBUTION	2015 ESTIMATE
Median Age	36.7





## Summary Table

SIC	RETAIL SECTOR	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
521	Lumber and Other Building Materials	\$18,838,700	\$3,400,000	\$15,438,700	93%
523	Paint, Glass, and Hardware	\$1,000,000	\$1,000,000	\$0	0%
525	Hardware	\$1,000,000	\$1,000,000	\$0	0%
526	Retail	\$1,000,000	\$1,000,000	\$0	0%
527	Mobile	\$1,000,000	\$1,000,000	\$0	0%
53	General	\$1,000,000	\$1,000,000	\$0	0%
541	Grocery	\$1,000,000	\$1,000,000	\$0	0%
542	Meat and Seafood	\$1,000,000	\$1,000,000	\$0	0%
543	Fruit and Vegetable	\$1,000,000	\$1,000,000	\$0	0%
544	Candy	\$1,000,000	\$1,000,000	\$0	0%
545	Dairy	\$1,000,000	\$1,000,000	\$0	0%
546	Retail	\$1,000,000	\$1,000,000	\$0	0%
549	Miscellaneous	\$1,000,000	\$1,000,000	\$0	0%
551	Newspapers	\$1,000,000	\$1,000,000	\$0	0%
552	Used Goods	\$1,000,000	\$1,000,000	\$0	0%
553	Auto and Truck	\$1,000,000	\$1,000,000	\$0	0%
554	Gasoline	\$1,000,000	\$1,000,000	\$0	0%
555	Boat and Marine	\$1,000,000	\$1,000,000	\$0	0%
556	Recreation	\$1,000,000	\$1,000,000	\$0	0%
557	Motor	\$1,000,000	\$1,000,000	\$0	0%
559	Automotive	\$1,000,000	\$1,000,000	\$0	0%
561	Men's	\$1,000,000	\$1,000,000	\$0	0%
562	Women's	\$1,000,000	\$1,000,000	\$0	0%
563	Women's	\$1,000,000	\$1,000,000	\$0	0%
564	Children's	\$1,000,000	\$1,000,000	\$0	0%
565	Family	\$1,000,000	\$1,000,000	\$0	0%
566	Shoe Stores	\$2,313,764	\$1,300,000	-\$1,013,764	-44%
569	Miscellaneous Apparel and Accessory Stores	\$1,606,374	\$200,000	-\$1,406,374	-88%
571	Home Furniture and Furnishing	\$12,408,570	\$500,000	-\$11,908,570	-96%
572	Household Appliance Stores	\$1,929,827	\$1,800,000	-\$129,827	-7%
573	Radio, TV, and Computer Stores	\$29,719,290	\$0	-\$29,719,290	-100%
5812	Eating Places	\$50,581,730	\$18,100,000	-\$32,481,730	-64%
5813	Drinking Places	\$1,613,386	\$0	-\$1,613,386	-100%
591	Drug Stores and Proprietary	\$9,157,381	\$1,400,000	-\$7,757,381	-85%
592	Liquor Stores	\$993,903	\$800,000	-\$193,903	-20%
593	Used Merchandise Stores	\$2,415,321	\$600,000	-\$1,815,321	-75%
5941	Sporting Goods, Bicycle and Gun Stores	\$1,671,991	\$500,000	-\$1,171,991	-70%
5942	Book Stores	\$764,618	\$0	-\$764,618	-100%
5943	Stationery Stores	\$2,962,049	\$0	-\$2,962,049	-100%
5944	Jewelry Stores	\$1,444,709	\$100,000	-\$1,344,709	-93%
5945	Hobby, Toy and Game Shops	\$1,265,013	\$100,000	-\$1,165,013	-92%
5946	Camera and Photography Supply Stores	\$200,859	\$0	-\$200,859	-100%
5947	Gift, Novelty and Souvenir Shops	\$1,928,825	\$400,000	-\$1,528,825	-79%
5948	Luggage and Leather Goods Stores	\$70,877	\$0	-\$70,877	-100%
5949	Sewing, Needlework and Craft Stores	\$230,788	\$400,000	\$169,212	73%
596	Non-store Retailers	\$4,803,718	\$0	-\$4,803,718	-100%
598	Fuel and Ice Dealers	\$362,899	\$600,000	\$237,101	65%
5992	Florists	\$904,869	\$700,000	-\$204,869	-23%
5993	Tobacco Stores and Stands	\$149,267	\$0	-\$149,267	-100%
5994	News Dealers and Newsstands	\$233,042	\$0	-\$233,042	-100%
5995	Optical Goods Stores	\$665,566	\$0	-\$665,566	-100%
5999	Miscellaneous Retail Stores, NEC	\$16,780,770	\$10,800,000	-\$5,980,768	-36%
	<b>TOTALS</b>	<b>\$401,637,100</b>	<b>\$195,700,000</b>	<b>-\$205,937,100</b>	<b>LEAKAGE</b>

### Summary Table (continued)

## SHOE STORES

LEAKAGE: \$1,013,764

TARGET:



**SHOE SHOW**

**SHOE DEPT.**

**SHOE CARNIVAL**

# RETAIL OPPORTUNITY

Identifies sales leakage - when residents purchase products/services outside of your community.

Measures consumer demand and retail opportunity.

# Auburn RETAIL GAP ANALYSIS



DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>2,919,229,096</b>	<b>1,179,874,209</b>	<b>(1,739,354,887)</b>
Motor Vehicle and Parts Dealers	570,800,421	296,128,075	(274,672,346)
Automotive Dealers	473,377,578	244,530,549	(228,847,029)
Other Motor Vehicle Dealers	55,020,659	24,306,079	(30,714,580)
Automotive Parts/Accsrs, Tire Stores	42,402,184	27,291,447	(15,110,737)
Furniture and Home Furnishings Stores	56,019,902	12,378,519	(43,641,383)
Furniture Stores	29,283,464	2,999,028	(26,284,436)
Home Furnishing Stores	26,736,438	9,379,491	(17,356,947)
Electronics and Appliance Stores	52,972,651	4,019,725	(48,952,926)
Appliances, TVs, Electronics Stores	41,449,733	3,456,018	(37,993,715)
Household Appliances Stores	7,341,850	167,010	(7,174,840)
Radio, Television, Electronics Stores	34,107,883	3,289,008	(30,818,875)
Computer and Software Stores	10,357,407	563,707	(9,793,700)
Camera and Photographic Equipment Stores	1,165,511	0	(1,165,511)
Building Material, Garden Equip Stores	297,202,041	80,101,374	(217,100,667)
Building Material and Supply Dealers	253,788,583	76,642,991	(177,145,592)
Home Centers	102,491,262	43,315,712	(59,175,550)
Paint and Wallpaper Stores	4,253,445	1,732,747	(2,520,698)
Hardware Stores	25,757,210	3,793,013	(21,964,197)
Other Building Materials Dealers	121,286,666	27,801,519	(93,485,147)
Lawn, Garden Equipment, Supplies Stores	43,413,457	3,458,383	(39,955,074)
Outdoor Power Equipment Stores	13,763,673	260,004	(13,503,669)
Nursery and Garden Centers	29,649,784	3,198,379	(26,451,405)

# Auburn RETAIL GAP ANALYSIS



DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE
Food and Beverage Stores	369,669,891	107,738,394	(261,931,497)
Grocery Stores	245,012,644	90,513,178	(154,499,466)
Supermarkets, Grocery (Ex Conv) Stores	229,431,025	87,210,639	(142,220,386)
Convenience Stores	15,581,619	3,302,539	(12,279,080)
Specialty Food Stores	30,722,995	6,986,272	(23,736,723)
Beer, Wine and Liquor Stores	93,934,252	10,238,944	(83,695,308)
Health and Personal Care Stores	144,372,981	32,857,138	(111,515,843)
Pharmacies and Drug Stores	114,462,305	21,400,966	(93,061,339)
Cosmetics, Beauty Supplies, Perfume Stores	9,869,031	5,915,978	(3,953,053)
Optical Goods Stores	7,166,506	1,707,281	(5,459,225)
Other Health and Personal Care Stores	12,875,140	3,832,913	(9,042,227)
Gasoline Stations	279,650,726	103,808,498	(175,842,228)
Gasoline Stations With Conv Stores	203,427,870	83,713,911	(119,713,959)
Other Gasoline Stations	76,222,856	20,094,587	(56,128,269)
Clothing and Clothing Accessories Stores	134,282,388	71,167,893	(63,114,495)
Clothing Stores	72,037,793	56,362,143	(15,675,650)
Men's Clothing Stores	3,525,468	7,029,833	3,504,365
Women's Clothing Stores	15,999,382	12,169,860	(3,829,522)
Childrens, Infants Clothing Stores	4,355,829	8,719,364	4,363,535
Family Clothing Stores	38,853,208	15,035,459	(23,817,749)
Clothing Accessories Stores	3,153,410	5,339,863	2,186,453
Other Clothing Stores	6,150,496	8,067,764	1,917,268
Shoe Stores	10,943,199	2,970,154	(7,973,045)
Jewelry, Luggage, Leather Goods Stores	51,301,396	11,835,596	(39,465,800)
Jewelry Stores	45,911,062	11,799,879	(34,111,183)
Luggage and Leather Goods Stores	5,390,334	35,717	(5,354,617)

# Auburn RETAIL GAP ANALYSIS



DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE
Sporting Goods, Hobby, Book, Music Stores	52,194,056	19,029,455	(33,164,601)
Sportng Goods, Hobby, Musical Inst Stores	44,960,399	16,327,270	(28,633,129)
Sporting Goods Stores	23,294,859	14,585,964	(8,708,895)
Hobby, Toys and Games Stores	12,613,420	695,302	(11,918,118)
Sew/Needlework/Piece Goods Stores	4,413,812	876,933	(3,536,879)
Musical Instrument and Supplies Stores	4,638,309	169,071	(4,469,238)
Book, Periodical and Music Stores	7,233,656	2,702,185	(4,531,471)
Book Stores and News Dealers	6,203,626	2,702,185	(3,501,441)
Book Stores	5,491,312	2,702,185	(2,789,127)
News Dealers and Newsstands	712,313	0	(712,313)
Prerecorded Tapes, CDs, Record Stores	1,030,031	0	(1,030,031)
General Merchandise Stores	334,523,048	269,815,492	(64,707,556)
Department Stores Excl Leased Depts	141,387,048	27,807,549	(113,579,499)
Other General Merchandise Stores	193,136,000	242,007,943	48,871,943
Miscellaneous Store Retailers	74,728,922	24,790,165	(49,938,757)
Florists	2,904,105	382,167	(2,521,938)
Office Supplies, Stationery, Gift Stores	36,099,345	7,769,832	(28,329,513)
Office Supplies and Stationery Stores	17,231,338	7,090,987	(10,140,351)
Gift, Novelty and Souvenir Stores	18,868,007	678,845	(18,189,162)
Used Merchandise Stores	5,932,645	1,690,159	(4,242,486)
Other Miscellaneous Store Retailers	29,792,827	14,948,007	(14,844,820)
Non-Store Retailers	242,914,123	32,856,946	(210,057,177)
Foodservice and Drinking Places	309,897,947	125,182,535	(184,715,412)
Full-Service Restaurants	139,916,625	38,191,789	(101,724,836)
Limited-Service Eating Places	123,837,864	78,951,522	(44,886,342)
Special Foodservices	34,047,600	5,878,899	(28,168,701)
Drinking Places -Alcoholic Beverages	12,095,859	2,160,325	(9,935,534)



 TheRetailCoach®

# PSYCHOGRAPHIC PROFILE

# PSYCHOGRAPHIC LIFESTYLE SEGMENTATION

All U.S. households fall into 1 of 66 lifestyle segments.

We divide your market into groups of consumers with **similar demographic characteristics, attitudes, lifestyles, purchase behaviors and work patterns.**





TheRetailCoach®

## TAPESTRY SEGMENTATION PROFILE

### + WHAT IS TAPESTRY SEGMENTATION?

Tapestry Segmentation is a market segmentation system that classifies US neighborhoods based on their socioeconomic and demographic compositions. Tapestry is a system for classifying consumers and constituents using all the variables that can distinguish consumer behavior, from household characteristics such as income and family type to personal traits like age, education, or employment and even housing choices.

Tapestry Segmentation classifies US neighborhoods into 67 distinct market segments. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Tapestry Segmentation combines the “who” of lifestyle demography with the “where” of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses—distinct behavioral market segments.

### + WHO SHOULD USE TAPESTRY SEGMENTATION?

All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The versatility and predictive power of Tapestry Segmentation allow users to integrate their own data or national consumer surveys into Tapestry Segmentation to identify their best market segments and reach them through the most effective channels.

### + TAPESTRY SEGMENTATION SUMMARY GROUPS

Esri's Tapestry Segmentation provides a robust, powerful portrait of the 67 US consumer markets. To provide a broader view of these 67 segments, Esri combined them into 14 LifeMode Summary Groups based on lifestyle and lifestage composition.

- L1 Affluent Estates
- L2 Upscale Avenues
- L3 Uptown Individuals
- L4 Family Landscapes
- L5 GenXurban
- L6 Cozy Country Living
- L7 Ethnic Enclaves
- L8 Middle Ground
- L9 Senior Styles
- L10 Rustic Outposts
- L11 Midtown Singles
- L12 Hometown
- L13 New Wave
- L14 Scholars and Patriots



## RETAIL TRADE AREA • LIFEMODE SUMMARY GROUPS MAP Auburn, Washington

### + L1 AFFLUENT ESTATES

Established wealth — educated, well-traveled married couples

### + L2 UPSCALE AVENUES

Prosperous, married couples in higher density neighborhoods

### + L3 UPTOWN INDIVIDUALS

Younger, urban singles on the move

### + L4 FAMILY LANDSCAPES

Successful younger families in newer housing

### + L5 GENXURBAN

Gen X in middle age; families with fewer kids and a mortgage

### + L6 COZY COUNTRY

Empty nesters in bucolic settings

### + L7 ETHNIC ENCLAVES

Established diversity — young, Hispanic homeowners with families

### + L8 MIDDLE GROUND

Lifestyles of thirtysomethings

### + L9 SENIOR STYLES

Senior lifestyles reveal the effects of saving for retirement

### + L10 RUSTIC OUTPOSTS

Country life with older families, older homes

### + L11 MIDTOWN SINGLES

Millennials on the move; single, diverse, and urban

### + L12 HOMETOWN

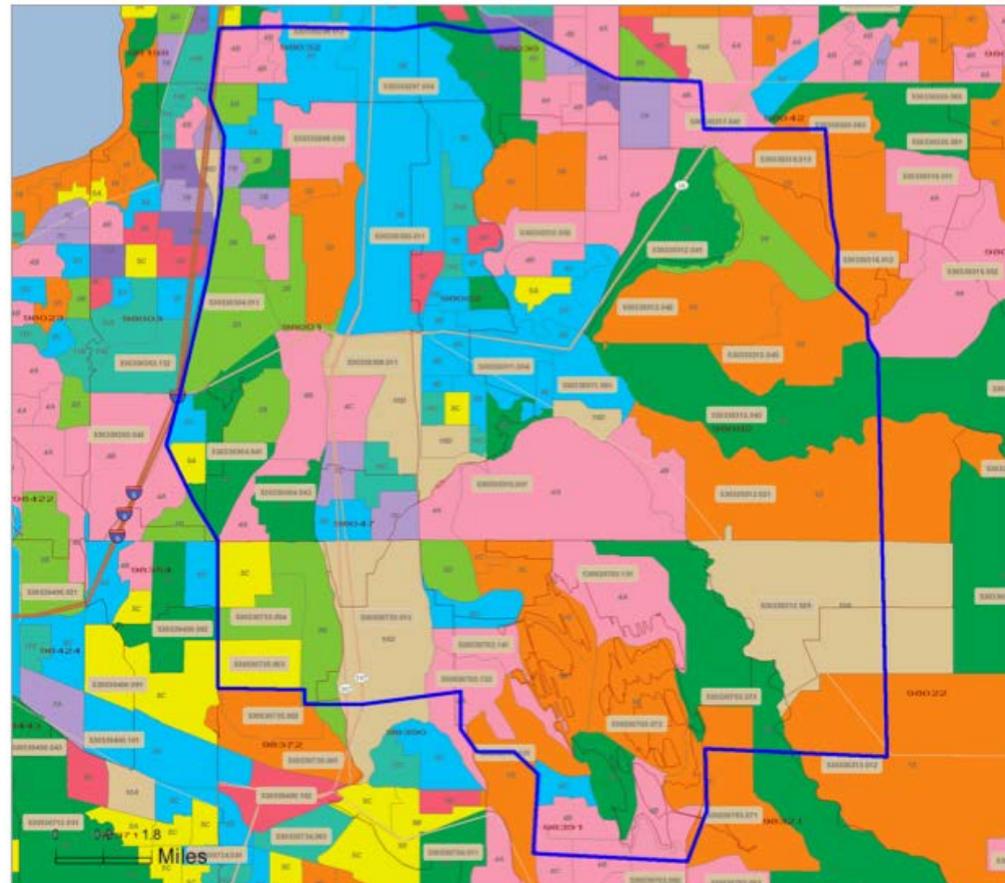
Growing up and staying close to home; single householders

### + L13 NEXT WAVE

Urban denizens; young, diverse, hardworking families

### + L14 SCHOLARS AND PATRIOTS

College campuses and military neighborhoods





## RETAIL TRADE AREA • TOP TAPESTRY SEGMENTS Auburn, Washington

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Soccer Moms (4A)	11.5%	11.5%	2.8%	2.8%	405
2	Home Improvement (4B)	8.9%	20.4%	1.7%	4.5%	518
3	Metro Fusion (11C)	7.6%	28.0%	1.4%	5.9%	542
4	Front Porches (8E)	7.6%	35.6%	1.6%	7.5%	475
5	Savvy Suburbanites (1D)	7.0%	42.6%	3.0%	10.5%	235
	<b>Subtotal</b>	<b>42.6%</b>		<b>10.5%</b>		
6	Bright Young Professionals (8C)	6.4%	49.0%	2.2%	12.7%	289
7	Green Acres (6A)	5.0%	54.0%	3.2%	15.9%	158
8	Pleasantville (2B)	4.9%	58.9%	2.2%	18.1%	219
9	Parks and Rec (5C)	4.2%	63.1%	2.0%	20.1%	207
10	Enterprising Professionals (2D)	3.5%	66.6%	1.4%	21.5%	252
	<b>Subtotal</b>	<b>24.0%</b>		<b>11.0%</b>		
11	Boomburbs (1C)	2.9%	69.5%	1.5%	23.0%	195
12	Retirement Communities (9E)	2.9%	72.4%	1.2%	24.2%	238
13	Young and Restless (11B)	2.5%	74.9%	1.7%	25.9%	146
14	Middleburg (4C)	2.4%	77.3%	2.8%	28.7%	84
15	International Marketplace (13A)	2.2%	79.5%	1.2%	29.9%	176
	<b>Subtotal</b>	<b>12.9%</b>		<b>8.4%</b>		
16	Exurbanites (1E)	1.9%	81.4%	1.9%	31.8%	100
17	American Dreamers (7C)	1.9%	83.3%	1.5%	33.3%	130
18	Down the Road (10D)	1.5%	84.8%	1.1%	34.4%	133
19	Set to Impress (11D)	1.4%	86.2%	1.4%	35.8%	101
20	City Lights (8A)	1.3%	87.5%	1.5%	37.3%	91
	<b>Subtotal</b>	<b>8.0%</b>		<b>7.4%</b>		
	<b>Total</b>	<b>87.5%</b>		<b>37.5%</b>		<b>234</b>



LifeMode Group • Family Landscapes

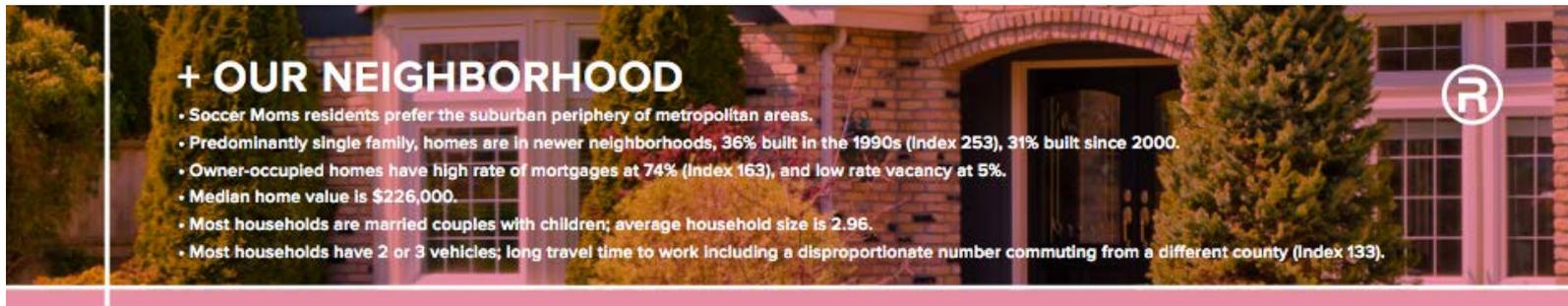
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## SOCCER MOMS

Soccer Moms is an affluent, family-oriented market with a country flavor.

Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

US Household // 3,327,000  
Average Household Size // 2.96  
Median Age // 36.6  
Median Household Income // \$84,000



## + OUR NEIGHBORHOOD

- Soccer Moms residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 36% built in the 1990s (Index 253), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 74% (Index 163), and low rate vacancy at 5%.
- Median home value is \$226,000.
- Most households are married couples with children; average household size is 2.96.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 133).

4A

## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- Most households own at least 2 vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 165), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like riding mowers and tillers.

## + SOCIOECONOMIC TRAITS

- Education: 37.7% college graduates; more than 70% with some college education.
- Low unemployment at 5.9%; high labor force participation rate at 72%; 2 out of 3 households include 2+ workers (Index 124).
- Connected, with a host of wireless devices from iPods to tablets—anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 159) and second mortgages (Index 154) and auto loans (Index 151).

## + 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:  
\$226,000  
US Median: \$177,000

# Auburn Psychographics



4A

## SOCCER MOMS LifeMode Group • Family Landscapes



### AGE BY SEX (Esri data)

Median Age: **36.6** US: 37.6

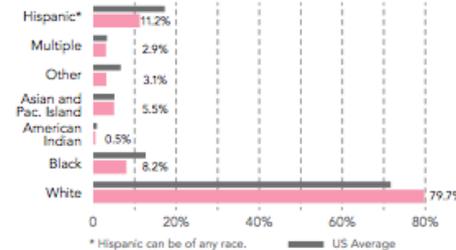
Indicates US



### RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

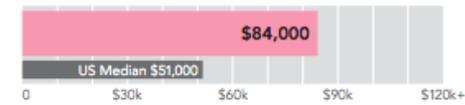
Diversity Index: **48.3** US: 62.1



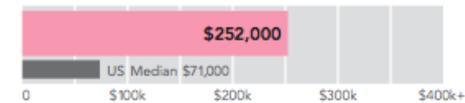
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Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

#### Median Household Income

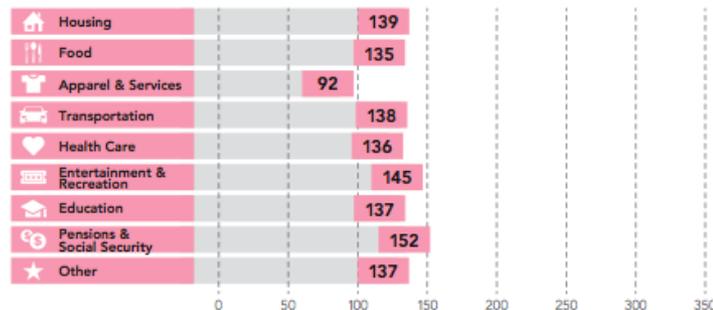


#### Median Net Worth



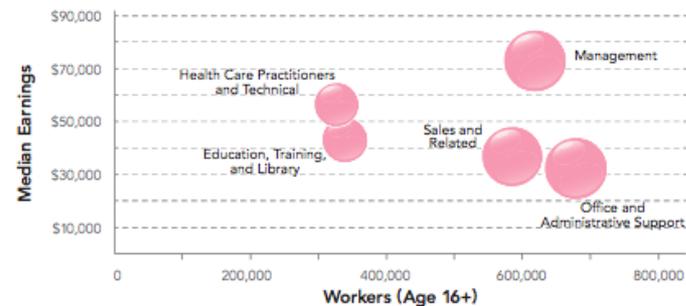
### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





LifeMode Group • Family Landscapes

## 4B HOME IMPROVEMENT

Married-couple families occupy well over half of these suburban households.

Most Home Improvement residences are single-family homes that are owner occupied, with only one-fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly. When at home, weekends are consumed with home improvement and remodeling projects.

US Household // 2,058,000  
Average Household Size // 2.86  
Median Age // 37.0  
Median Household Income // \$67,000



## + OUR NEIGHBORHOOD

- These are low density suburban neighborhoods.
- Eight of every 10 homes are traditional single-family dwellings, owner occupied.
- Majority of the homes were built between 1970 and 2000.
- More than half of the households consist of married-couple families; another 12% include single-parent families.

4B

## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- Enjoy working on home improvement projects and watching DIY networks.
- Make frequent trips to warehouse/club and home improvement stores in their minivan or SUV.
- Own a giant screen TV with fiber-optic connection and premium cable; rent DVDs from Redbox or Netflix.
- Very comfortable with new technology; embrace the convenience of completing tasks on a mobile device.
- Enjoy dining at Chili's, Chick-fil-A, and Panera Bread.
- Frequently buy children's clothes and toys.

## + SOCIOECONOMIC TRAITS

- Higher participation in the labor force and lower unemployment than US levels; most households have 2+ workers.
- Cautious consumers that do their research before buying, they protect their investments.
- Typically spend 4–7 hours per week commuting, and, therefore, spend significant amounts on car maintenance (performed at a department store or auto repair chain store).
- They are paying off student loans and second mortgages on homes.
- They spend heavily on eating out, at both fast-food and family restaurants.
- They like to work from home, when possible.

## + 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:

\$174,000

US Median: \$177,000



4B

## HOME IMPROVEMENT

LifeMode Group • Family Landscapes



### AGE BY SEX (Esri data)

Median Age: **37.0** US: 37.6

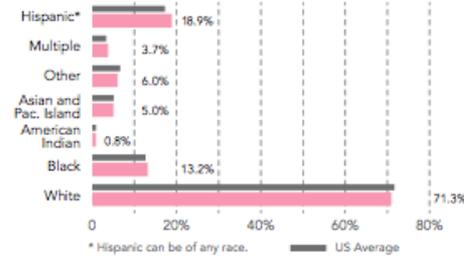
| Indicates US



### RACE AND ETHNICITY (Esri data)

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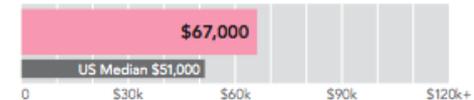
Diversity Index: **63.4** US: 62.1



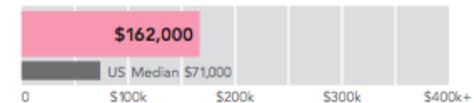
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#### Median Household Income

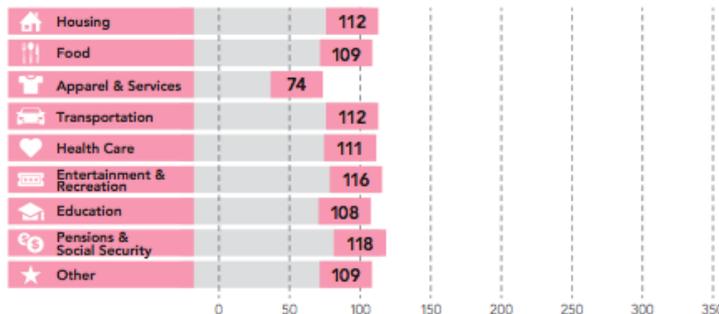


#### Median Net Worth



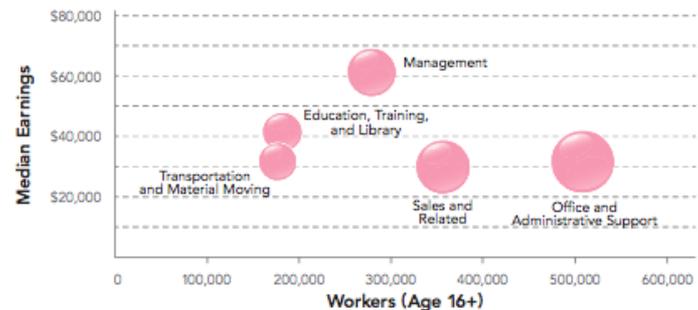
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### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





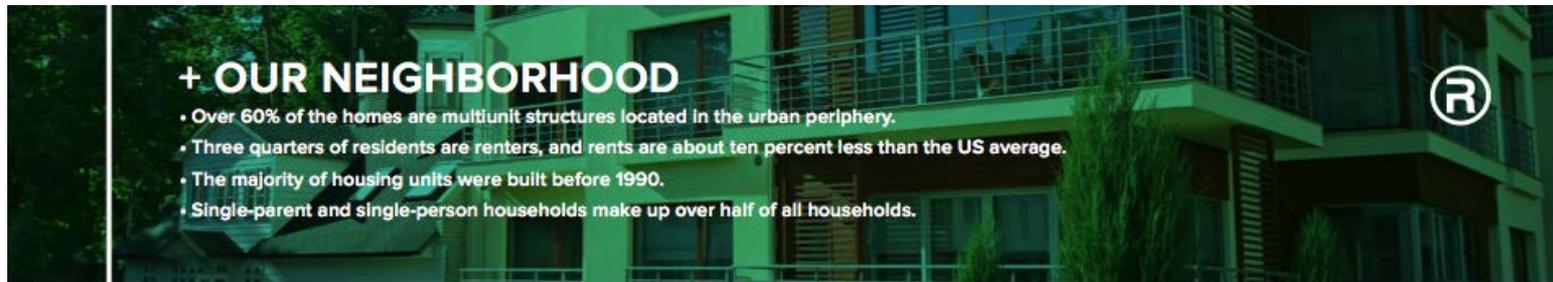
LifeMode Group • Midtown Singles

## 11C METRO FUSION

Metro Fusion is a young, diverse market. Many residents do not speak English fluently and have moved into their homes recently.

They are highly mobile and over three quarters of households are occupied by renters. Many households have young children; a quarter are single-parent families. The majority of residents live in midsize apartment buildings. Metro Fusion is a hard-working market with residents that are dedicated to climbing the ladders of their professional and social lives. This is particularly difficult for the single parents due to median incomes that are 35% lower than the US level.

US Household // 1,664,000  
Average Household Size // 2.63  
Median Age // 28.8  
Median Household Income // \$33,000



## + OUR NEIGHBORHOOD

- Over 60% of the homes are multiunit structures located in the urban periphery.
- Three quarters of residents are renters, and rents are about ten percent less than the US average.
- The majority of housing units were built before 1990.
- Single-parent and single-person households make up over half of all households.



11C

## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- They enjoy watching MTV, BET, Spanish TV networks, and pay-per-view.
- They listen to R&B, rap, Latin, and reggae music.
- Football and soccer are popular sports.
- They shop at discount grocery stores, Kmart, and Walmart.
- They often eat frozen dinners, but when dining out prefer McDonald's, Wendy's, and IHOP.

## + SOCIOECONOMIC TRAITS

- They're a diverse market with 30% black, 34% Hispanic, and 20% foreign born.
- Younger residents are highly connected, while older residents do not have much use for the latest and greatest technology.
- They work hard to advance in their professions, including working weekends.
- They take pride in their appearance, consider their fashion trendy, and stick with the same few designer brands.
- They spend money readily on what's hot unless saving for something specific.
- Social status is very important; they look to impress with fashion and electronics.

## + HOUSING

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**Typical Housing:**  
Multiunit Rentals  
Single Family  
**Average Rent:**  
\$880  
US Average: \$990

# Auburn Psychographics



11C

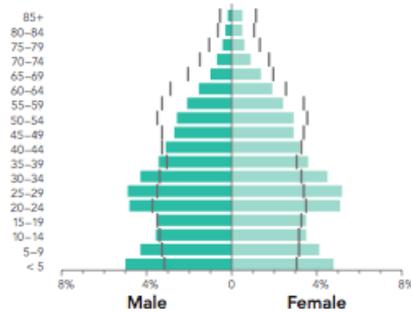
## METRO FUSION LifeMode Group • Midtown Singles



### AGE BY SEX (Esri data)

Median Age: **28.8** US: 37.6

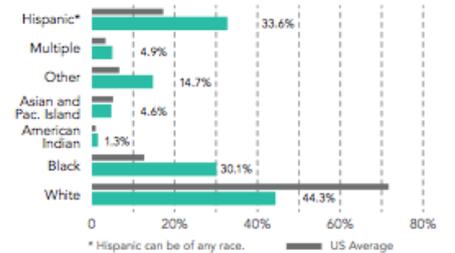
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### RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **84.0** US: 62.1



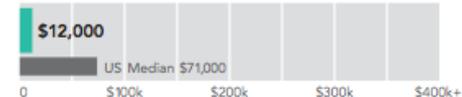
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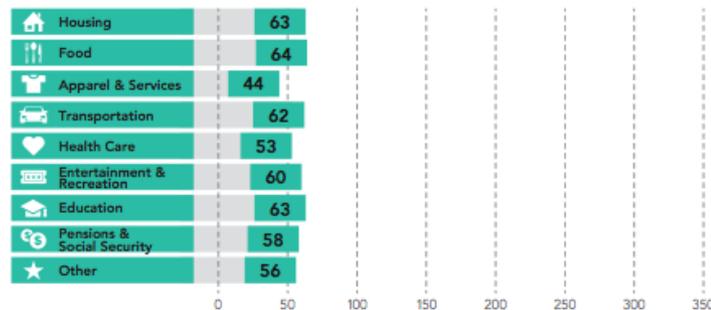


#### Median Net Worth



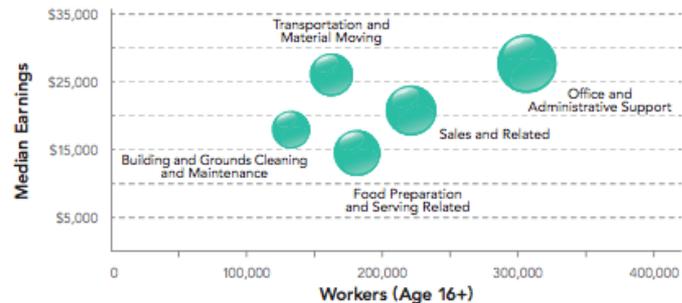
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### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





LifeMode Group • Middle Ground

## 8E FRONT PORCHES

Front Porches blends household types, with more young families with children or single households than average.

This group is also more diverse than the US. Half of householders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to Front Porches residents and help to influence household buying decisions. Residents enjoy their automobiles and like cars that are fun to drive. Income and net worth are well below the US average, and many families have taken out loans to make ends meet.

US Household // 1,910,000  
Average Household Size // 2.55  
Median Age // 34.2  
Median Household Income // \$39,000



## + OUR NEIGHBORHOOD

- Nearly one in five homes is a duplex, triplex, or quad; half are older single-family dwellings.
- Just over half the homes are occupied by renters.
- Older, established neighborhoods; three quarters of all homes were built before 1980.
- Single-parent families or singles living alone make up almost half of the households.

8E

## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- Go online for gaming, online dating, and chat rooms.
- Use their cell phones to redeem mobile coupons and listen to hip-hop and R&B music.
- Drink energy and sports drinks.
- Participate in leisure activities including sports, indoor water parks, bingo, and video games.
- Watch Comedy Central, Nickelodeon, and PBS Kids Sprout.

## + SOCIOECONOMIC TRAITS

- Composed of a blue-collar work force with a strong labor force participation rate, but unemployment is high at 11%.
- Price is more important than brand names or style to these consumers.
- With limited incomes, these are not adventurous shoppers.
- They would rather cook a meal at home than dine out.
- They seek adventure and strive to have fun.

## + HOUSING

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### Typical Housing:

Single Family;  
Multifamily

### Average Rent:

\$890  
US Average \$990



8E

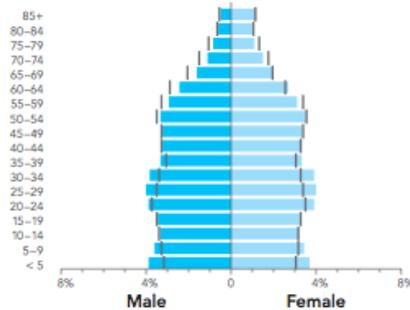
## FRONT PORCHES LifeMode Group • Middle Ground



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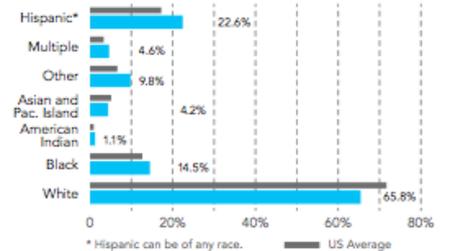
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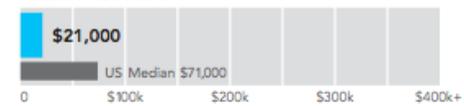
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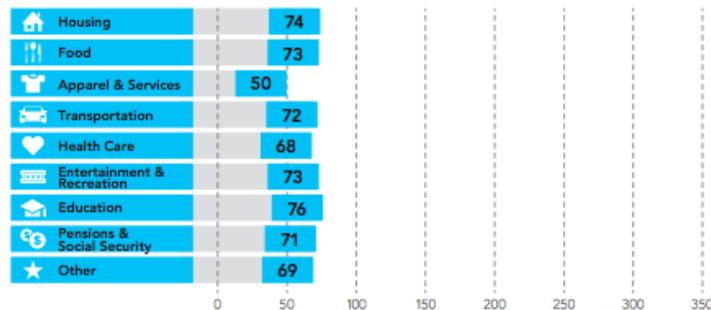


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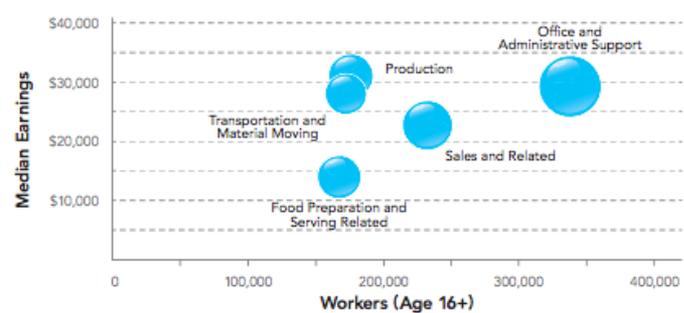
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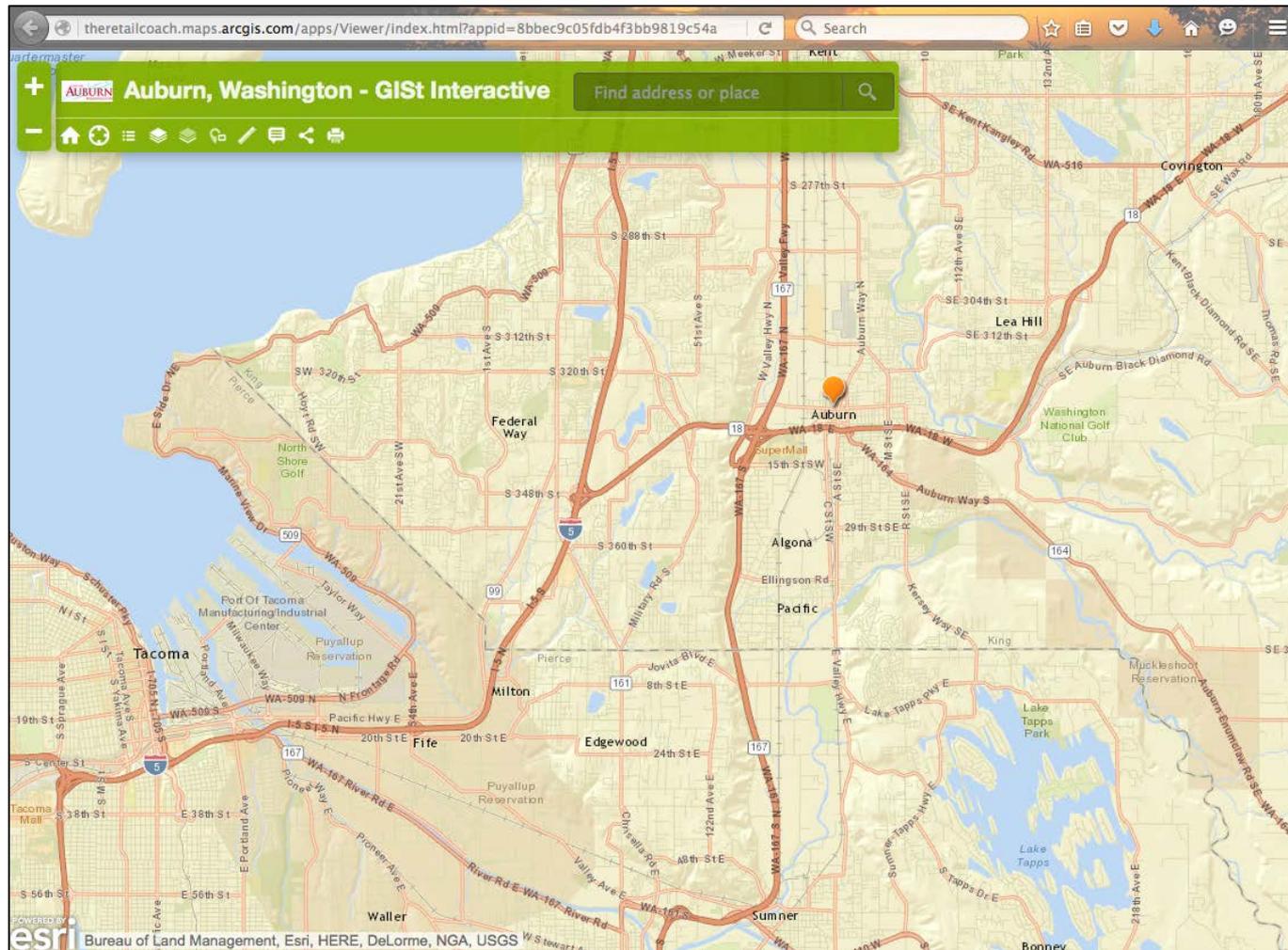




# SITES AND PROPERTIES FOR DEVELOPMENT

The first questions an interested retailer asks: “Where can I put my business?” “Send me possible sites that match fit my needs.”

# Auburn Interactive Mapping App



<http://theretailcoach.maps.arcgis.com/apps/Viewer/index.html?appid=8bbec9c05fdb4f3bb9819c54ae4785b2>

## Retail Market Profile 2015



### Contact Information

**Doug Lein, Economic Development Manager**  
 City of Auburn  
 25 West Main Street  
 Auburn, Washington 98001  
 Phone 253.804.3101  
 dlein@auburnwa.gov  
 www.auburnwa.gov

January 2016. All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions. Prepared by The Retail Coach, LLC, a national retail consulting and market research firm. 800.851.0962.

### Population

	2000	2010	2015 ESTIMATE	2020 PROJECTION
Retail Trade Area	440,871	501,397	525,778	559,238

### Income

	2015 ESTIMATE
Average Household	\$84,190
Median Household	\$68,107
Per Capita	\$30,881

### Educational Attainment

	2015 ESTIMATE
Graduate or Professional	73%
Bachelor's Degree	18.5%
Associate Degree	10.3%
Some College, No Degree	25.2%
High School Graduate	23.1%
Some High School, No Degree	6.7%
Less than 9th Grade	4.2%

### Race Distribution

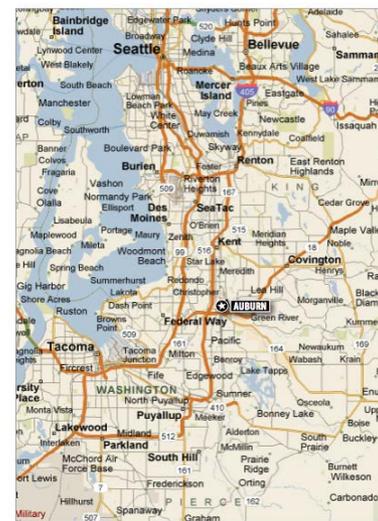
	2015 ESTIMATE
White	66.2%
Black or African American	6.9%
American Indian/Alaskan	1.3%
Asian	11.6%
Native Hawaiian/Islander	1.7%
Other Race	6.3%
Two or More Races	6.1%
Hispanic or Latino (of any race)	13.1%

### Age

GROUPS	2015 ESTIMATE
9 Years and Under	13.3%
10-14 Years	6.6%
15-24 Years	13.7%
25-34 Years	14.1%
35-44 Years	13.1%
45-54 Years	14.4%
55-64 Years	12.9%
65 Years and Over	11.9%
<b>DISTRIBUTION</b>	<b>2015 ESTIMATE</b>
Median Age	36.7



## LOCATION MAP



Information provided for illustrative purposes only and is deemed to be correct as of publication date of this document. Data sources used may include U.S. ACS, Nielsen, Regisys, StreetView, and/or other Microsoft Corporation.

## EXISTING RETAIL



# COMMUNITY MARKETING

- Community Retail Market Profile
- Retailer-Specific Feasibility Packages
- Individual Site Profiles
- Retail-Specific Website
- Property Visuals
- Developer Packaging

# RETAILER + DEVELOPER MATCHING & RECRUITMENT

A community must utilize:

- Area Market Analysis
- Community Market Analysis
- Retail Trade Area Demographic Profile
- Dominant Lifestyle Profiles
- Retail Gap/Opportunity Analysis findings
- Available Properties
- Internal retailer and restaurant database



Retail must be recruited.



BE SEEN - ICSC

3

OPPORTUNITY  
DISCUSSION

# VISION & GUIDING PRINCIPLES

- Auburn as “the City that Works”
  - A vibrant, healthy place for residents to live
  - A robust employment base that provides economic opportunity for residents
  - A strong educational system that prepares residents with skills that support these economic opportunities

# OPPORTUNITY AREAS



## ED Delivery

*Traditional:*

Retention  
Recruitment  
Expansion  
Formation

*Strategic:*

Partnerships  
Retail  
Catalysts

## Business Climate & Real Estate

IPZ  
Auburn Way N

Competitiveness  
Deal-ready sites

## Gateways & Destinations

Downtown  
Auburn Way S  
A Street  
15<sup>th</sup> Street  
Lakeland Hills  
Lea & West Hill

## Marketing

Perceptions  
Awareness  
Interest  
Target Industries

# ECONOMIC DEVELOPMENT DELIVERY

- New leadership at ADA & Chamber
- Stronger partnerships with GRC & School District

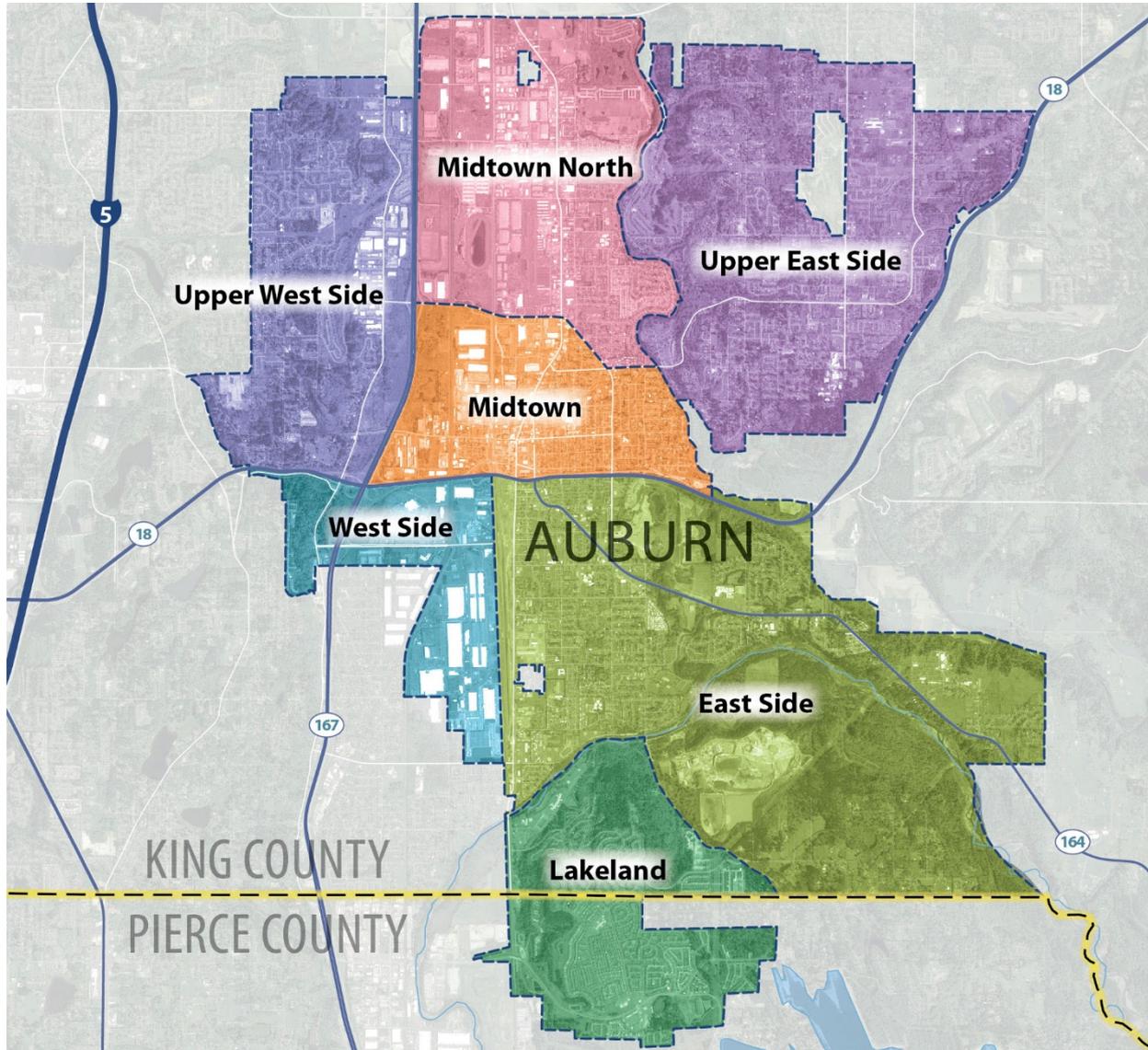
# BUSINESS CLIMATE & REAL ESTATE

- Business climate recommendations informed by market capacity study, competitiveness comparison, & perception survey
- Big sites
  - GSA
  - Valley Drive-In

# GATEWAYS & DESTINATIONS

- Revitalization of Auburn Way S
- Continued focus on downtown
- Development of unique neighborhoods & character areas that connect to the whole

# NEIGHBORHOODS



# MARKETING

- Change perceptions of Auburn
- Build awareness of opportunities in Auburn
- Generate interest in Auburn

4

NEXT STEPS

- Next trip: April 5 - 6
- Complete existing conditions analysis & market capacity analysis
- Complete SWOT analysis
- Conduct community survey through TalkAuburn
- Continue reverse site selection & perception survey



QUESTIONS

THANK YOU



TIP strategies  
AUSTIN • SEATTLE



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