



## **City of Snoqualmie Urban Growth Area Analysis**

### **Part I: Project Framework Overview and Retail Leakage Study**

Prepared for the City of Snoqualmie and Michael Griffith

Prepared by CollinsWoerman

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## **City of Snoqualmie – Urban Growth Area Analysis**

### **Project Framework Overview and Retail Leakage Study**

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## City of Snoqualmie – Urban Growth Area Analysis Project Framework Overview and Retail Leakage Study

### Executive Summary

#### *Study Purpose*

The purpose of this study is to determine whether the City's existing corporate limits, together with its current UGA, include sufficient suitable areas to accommodate the full range of medical, governmental, institutional, commercial, service, retail, and other nonresidential uses that will be needed to serve the projected urban growth over the twenty-year period between 2012-2032.

#### *Study Framework*

The scope of work for this study includes the following three phases:

##### **1. Planning Framework**

- Research existing documentation, including studies, reports, and planning documents
- Conduct an initial planning workshop with City of Snoqualmie staff and Mayor
- Research growth/land use trends on the East Side, including interviews and reviews of documentation
- Conduct a basic retail leakage study for the Snoqualmie market area
- Prepare a summary memorandum of initial findings

##### **2. Baseline Analysis and Inventory of Land Uses**

- Inventory and classification of buildable land
- Inventory of existing institutional and non-residential uses, including field verification

##### **3. Future Land Use Needs Assessment**

- Institutional land use needs assessment
- Non-residential land use needs assessment
- Supply/Demand analysis

This report represents the first phase of work undertaken as part of an analysis of the capacity of land available for non-residential uses within the City of Snoqualmie's existing corporate limits and urban growth area. These non-residential uses include the full range of medical, governmental, institutional, commercial, service, retail, and other nonresidential uses that will be needed to serve the projected urban growth over the period 2012-2032.

Documented in Part I of this report are summaries of existing data and information pertaining to current land use planning and economic development in the City of Snoqualmie and neighboring communities in East King County. In addition to published information, several interviews were conducted with individuals familiar with development trends and land use in Snoqualmie and the surrounding region. The research conducted during this phase points to significant existing economic development assets, including geographic location and quality of place, a population with high levels of income and education, well-developed existing infrastructure, an entrepreneur-friendly environment, reasonable lease rates, a favorable regulatory environment, and good potential for growth in niche market sectors such as health and wellness, outdoor recreation, and tourism. A number of potential limitations were also highlighted, including a location that is often perceived as "too far out" (especially for



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office/flex/light industrial tenants), floodway/floodplain constraints, a high rate of retail business leakage, the relative distance of the Historic Downtown from I-90, and physical limitations (e.g., growth limitations around the I-90 corridor). In addition, reduced (relative to the 2007 projection from the 20-year King County Buildable Lands Report) job growth targets could potentially create limitations on the expected rate of growth for the City. The next phases of this study will consider these strengths and limitations in light of the amount of available buildable land and existing uses in the City and its UGA.

A review of the projected demand for institutional uses is also included in Part I. For the purposes of this report, schools, hospital/healthcare facilities, parks and open space, and other public facilities were considered in this category.

Part II of this report includes a retail leakage study. The purpose of the study is to determine whether the existing retail in Snoqualmie is able to meet the needs (i.e. demand) of residents, and if not, how much is being “leaked” to retailers in other cities. The study found that, for the retail categories included in the study, the City of Snoqualmie leaks approximately 73% of its residents’ retail spending. In terms of the total amount of spending leaked, the top five retail categories are:

- Vehicle purchases (net outlay) - \$16,291,016
- Groceries, including alcohol for home consumption - \$12,587,833
- Gas stations - \$10,785,789
- Clothing, shoes, jewelry, and accessories - \$10,663,689
- Restaurants, bars, and catering - \$9,468,188

In addition, the study is intended to quantify the land use implications of retail leakage by estimating how much land would be required to accommodate the additional development needed to meet currently unfulfilled local demand. The insights provided by the retail leakage study provide a foundation that will be used for later phases of work that will look more closely at how and where Snoqualmie can accommodate needed retail development.



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### **Part I: Project Framework Overview**

#### **Introduction and Purpose of Study**

##### *Background*

In 2009, the legislature amended the Growth Management Act ("GMA") to require that the urban growth area ("UGA") for each City include areas sufficient to accommodate the broad range of needs and uses that will accompany projected urban growth:

Based upon the growth management population projection made for the county by the Office of Financial Management, the county and each city within the county shall include areas and densities [in the urban growth area] sufficient to permit the urban growth that is projected to occur in the county or city for the succeeding twenty-year period... As part of this planning process, each city within the county must include areas sufficient to accommodate the broad range of needs and uses that will accompany the projected urban growth including, as appropriate, medical, governmental, institutional, commercial, service, retail, and other nonresidential uses.[Emphasis added]. RCW 36.70A.110(2).

Substitute House Bill (SHB) 1825, effective July 26, 2009. The Final Bill Report explains the legislative intent:

The requirement that amendments to GMA comprehensive plans provide for sufficient land capacity to accommodate projected housing and employment growth is expanded to require the inclusion of the land needed for specified categories of facilities. Specifically, such amendments must include sufficient land capacity to accommodate medical, governmental, educational, institutional, commercial, and industrial facilities related to such growth, when appropriate under the circumstances existing within the planning jurisdiction.

#### **Protocols and Analytic Methods for Project**

Through meetings with the City of Snoqualmie and client, we developed the analytical framework anticipated for this project. This includes qualitative, quantitative, and spatial data analysis to produce an accurate picture of the current developable land capacity for non-residential uses in Snoqualmie. These uses include (but are not limited to) institutional, commercial office, retail, industrial, hospitality, and recreation uses. Qualitative data include information gathered from other professionals knowledgeable on the subject of development trends and land use either in Snoqualmie, in the surrounding area of East King County, or from a regional perspective. Qualitative data gathered from individuals was generated from prepared interview questions tailored to each individual's expertise. Data was also gathered from secondary sources, such as studies, published articles, or government documents specific to Snoqualmie and the surrounding general region. Quantitative data sources include taxable retail sales from the Washington Department of Revenue, consumer expenditure data from the U.S. Bureau of Labor Statistics, U.S. Census income data, and retail store square footage data from the Urban Land Institute's *Dollars and Cents of Shopping Centers*. Regional spatial data were gathered from publicly-available government sources; local data and GIS cartographic standards were generously provided by City of Snoqualmie staff.

This memorandum summarizes the information gathered in the first phase of this study, done in accordance with the tasks outlined in the scope of work, above. Information collected in this first phase



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will be used to support the work of the second and third phase of the project. A complete list of all references, including interviewees and documentation reviewed to support the findings below, is appended at the end of this document.

### Overall Vision and Core Community Values

Meetings with City of Snoqualmie Staff confirmed the City's commitment to sustainable economic development in line with its core values, which include maintaining "traditional" growth patterns, avoiding "cookie-cutter" type development, and maintaining its scenic beauty and natural character.<sup>1</sup> There is also a strong expressed desire to be a community that provides living wage job opportunities and services to its residents, as well as easy access to community and neighborhood retail and essential services such as education and healthcare. Though a City-wide, long-term sustainable economic development plan has not been developed recently, the city has expressed its desire to advance its goals in a number of key industry sectors, many of them targeted for specific locations (See the **Snoqualmie Economic Development Opportunities** map in the *Data Sources, References, and Maps* section of this document).

The following vision statement, taken from the Comprehensive Plan, summarizes the City's core values and goals for future development:

*We, the citizens of Snoqualmie, envision a City that respects and preserves its historical and cultural resources and provides an effective stewardship of its outstanding scenic and natural features; a City that maintains its historic small town identity while encouraging a balanced, cohesive yet diverse community as it grows; a City that continues to thrive in its location within the floodplain while taking every action possible to alleviate the impacts of flooding; a community where residents' various physical, educational, economic and social activities can be pursued in a safe, attractive and healthy environment; and finally, a City that has an adequate tax base to provide a high level of service to its residents.*

The plan (along with the vision) is currently being updated; the updated vision ("Vision 2032") includes the following core components:<sup>2</sup>

- A **Unified City with Strong Leadership** that cultivates community, incorporates equity and sustainability in decision-making, fosters partnerships to further local and regional goals, and thrives through active citizen engagement.
- A **Healthy, Diverse Economy**, with stable businesses and employment opportunities that benefit our citizens, the surrounding rural area and the region as a whole.

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<sup>1</sup> City of Snoqualmie, *Snoqualmie Vicinity Comprehensive Plan 2006* (2009 update) 2-1, 2-50.

<sup>2</sup> City of Snoqualmie, *Vision 2032: Comprehensive Plan Update* (6/24/2011)

<http://www.ci.snoqualmie.wa.us/CityDepartments/Planning/Vision2032ComprehensivebrPlanUpdate.aspx>



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- A **Distinctive Sense of Place** based on the quality and beauty of our natural and built environment, valued historic and cultural assets, unique local character, and a commitment to quality design and construction.
- A **Livable and Complete Community** where our citizens can live, work, socialize and recreate in a safe, attractive and healthy environment.



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### Economic Development Priorities, Opportunities, and Strengths

#### *Overview*

The City and others interviewed during this project identified a number of economic development opportunities and limitations for the Snoqualmie market area. For the purpose of this study, economic development priorities are defined as those that the City, through its planning processes or otherwise, has identified as desirable for future growth. These priorities have been identified in terms of both *general industry sectors* as well as *specific uses*. Priorities were identified in current documentation created by the City as well as through interviews conducted with city staff.

Economic development opportunities and general strengths were identified through conversations with interviewees as well as documentation reviewed as part of this phase of work. Along with specific opportunities identified by the City as priorities, interviewees provided insights on a number of other potential areas for growth and areas of opportunity. These are organized by property sector (commercial office, retail, hospitality, etc.)

Limitations are considered broadly in this section to include those created by the City or some other regulatory body as well as those that are more related to general limitations of the market or physical attributes. For example, the City has expressed on numerous occasions its desire to manage growth in a manner consistent with its unique context and character and to develop in a way that is appropriate for its scale. The City recognizes that these considerations must be balanced with economic growth considerations including economic growth that meets the retail and service needs of residents, promotes core economic development goals such as tourism, provides sufficient revenues to sustain city operations, and helps to maintain a healthy jobs/housing balance. Important aspects of Snoqualmie's unique character (as stated in the Comprehensive Plan) include its local heritage, scenic beauty, a natural atmosphere, and traditional design. The type of commercial development that exists in the city now and that will be created in the future is shaped by this framework, as well as by more specific policies and regulations relating to character (such as limitations on drive-through uses in the Snoqualmie Ridge neighborhood center retail area and limitations on freeway signage near the I-90 / SR-18 interchange). The city previously limited the size of retail tenant spaces for the Ridge retail development area to a maximum size of 20,000 SF (except grocery). This directly affected the scale and type of economic development that the City attracted for this retail area; for example, typical large big box stores were essentially unfeasible because of the limited area available and Snoqualmie Ridge regulations on retail tenant spaces, as well as bulk and scale of buildings.





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### *Economic Development Conditions Overview: By Location*

#### Snoqualmie Ridge Background

Snoqualmie Ridge is a master-planned development within the City which includes a mix of residential, retail, commercial/industrial and recreational uses. Phase I was approved in 1995 and development of homes and businesses commenced in 1997. Phase II was not envisioned at that time, but was later proposed in the context of a large regional open space conservation effort involving purchase of development rights known as the Snoqualmie Preservation Initiative (SPI). Phase II, which was approved in 2004 pursuant to milestones established in the SPI agreement, includes some areas slated for commercial use, but a majority of the site was designated for residential development. Except for vacant parcels in the Snoqualmie Ridge Business Park, Phase I is built out. Phase II is approximately 60% built-out. Prior to development of Snoqualmie Ridge, the City had a population of approximately 1,500 residents. The current population is approaching 11,000.

#### Snoqualmie Ridge Neighborhood Center Retail Area

The main retail area at Snoqualmie Ridge contains approximately 127,000 SF of space for retail use (there is also a small amount of retail space at Kimball Creek Village, approximately 1.5 miles to the east on Snoqualmie Parkway). Originally planned to be about 17 acres, the retail portion of the development was downsized to 11 acres through an amendment to the approved land use plan (before Phase II was contemplated). As a result, most of the retail at the Ridge only partially serves the resident population. The existing retail area lacks the capacity for larger retail spaces that could attract anchor tenants and provide a wider mix of goods and services to serve the city and surrounding rural area. Lack of retail capacity is one of the primary reasons that Snoqualmie is estimated to “leak” approximately 73% of its resident’s retail spending to other markets. Implications of this retail leakage and the limitations of current retail space are discussed in more detail in the included 2011 Retail Leakage Study, included as **Part II** of this memorandum.

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*The Snoqualmie Ridge core retail area contains about 127,000 SF of retail space, serving mainly the local population of Snoqualmie.*

### Snoqualmie Ridge Business Park

Inclusion of the business park as part of the development was intended to meet the City's objectives to provide access to employment opportunities in close proximity to residential uses and to provide a balanced mix and range of land uses that would minimize the need for the use of automobiles on a daily basis. As part of the approved master plan for Snoqualmie Ridge, the business park property owner is entitled to develop the remaining business park parcels consistent with the Mixed Use Final Plan and Snoqualmie Ridge Development Standards, which specify the allowed uses within the business park. The City cannot unilaterally change land use plan, allowed uses or development standards that apply to properties within the business park.

The business park has shown slow but relatively steady growth since it was first created in the late 1990's. With approximately 1/3 of the land area left to be developed, absorption of the remaining land could take place in the next five years (assuming a healthy economic recovery), according to interviewees. However, significant existing properties remain to be leased or sold, such as the Philips building (for sale), the Kendall Lake building (approximately 40% vacant), and the Venture Commerce center (~2,000-3,000 SF condominium office space). The commercial office and flex space in the business park continues to suffer from the perception that Snoqualmie is "too far out" from urban areas in the region closer to the Seattle metropolitan area. The smaller condominium office spaces, which are geared toward smaller businesses or entrepreneurs looking to expand, may not be feasible to purchase given current limitations on credit for buyers. Other uses, such as hospitality, have had difficulty gaining traction in the business park, or have not been permitted, such as retail (given the desire on the part of the city to keep retail limited to the area directly to the northwest across Snoqualmie Parkway).

In an effort to increase the availability of land in the Snoqualmie Ridge neighborhood center area for retail use, in 2005 the development standards were amended to allow certain retail uses on four vacant

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lots fronting on the Snoqualmie Parkway that range in size from approximately four to eight acres (totaling about 20 acres). The property owner consented to the amendment, which allowed for retail uses in addition to the commercial/industrial uses already allowed. Given their size, the hope was that retail uses that were previously not feasible across the Snoqualmie Parkway could develop on these parcels. However, since the amendment, no retail uses have been developed, although one ~9-acre parcel was recently purchased and has been approved for an office, R&D and distribution facility. A portion of another parcel has been purchased for development of a branch bank.

Draft standards have been created for retail and mixed-use commercial development on these parcels that define the types of retail uses permitted. In order to maintain the pedestrian-oriented character of the neighborhood center retail area, minimize direct competition with the retail area businesses, and support compatibility with existing business park buildings and uses, these standards exclude businesses that engage in sales, leasing, servicing, repair or storage of motor vehicles, adult-oriented businesses of any nature, and any drive-through food or beverage service. Single story retail uses are limited to low-rise structures with a maximum building height of two stories above the adjacent sidewalk grade, with exceptions granted for retail buildings that include a theater. Vertical mixed-use buildings containing upper story hotel, residential and/or office uses shall have a maximum building height of four stories or 60 feet, provided, a deviation may be granted to allow a total height of 5 stories for a vertical mixed use building containing a boutique hotel.



*Flex-office buildings in the Ridge Business Park: 32935 SE Douglas St. and the Technical Glass building.*



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#### SR-18 / I-90 Interchange

The SR-18 / I-90 interchange area has long been an area of specific interest to the city in terms of community planning and economic development, though it remains outside of the current UGA and is currently designated as rural residential land by King County. The unincorporated area around the interchange was identified as an area of future review by King County and the City of Snoqualmie in the 1990 Interlocal Agreement published in King County's Snoqualmie Valley Community Plan.<sup>3</sup> The area is also within the Mountains to Sound Greenway. The City has expressed its desire to protect the scenic value of the I-90 corridor by participating with other agencies to further the vision of such a regional greenway<sup>4</sup>, and works in partnership with the Mountains to Sound Greenway Trust to further this goal.

Currently, the area remains unavailable for development beyond the stipulations of development allowed under King County's "RA-5" zoning designation (one dwelling unit per five acres). A new hospital facility is planned for the Snoqualmie Ridge II "S-21" parcel west of Snoqualmie Parkway and approximately 450 ft. north of I-90, within City of Snoqualmie limits. This parcel and other adjacent parcels to the south and east have been the subject of economic development discussions in the recent past; notably, a 2008 proposal sought to expand the UGA to accommodate a much larger (85-acre) Snoqualmie Hospital campus, BCC branch campus, and associated ancillary uses. Limitations on economic development in this location historically have included concerns about the potential for commercial development of the interchange area (dating to the early 1990's planning processes preceding the Snoqualmie Ridge development and subsequent UGA adjustments)<sup>5</sup>, the Mountains to Sound Greenway, and most importantly, the fact that the properties remain located outside of the City's urban growth area.

Should zoning revisions occur, through annexation or otherwise, a number of new uses near the interchange may prove to be economically feasible. According to interviewees and existing data, some uses, such as retail and hotel, would benefit from the access and visibility provided by the proximity to major transportation corridors.<sup>6</sup> Other uses, such as office, may also be feasible but suffer from slower absorption rates because of lack of proximity to amenities that exist closer to the Ridge Business Park.

#### Former Weyerhaeuser Mill Site

The area characterized as the former Weyerhaeuser Mill Site includes approximately 600 acres, approximately half of which is currently owned by Snoqualmie Mill Ventures, with the balance owned by Weyerhaeuser Real Estate Development Company (all of which is located within the FEMA floodway). The portion of the Mill site owned by Snoqualmie Mill Ventures, which contains much of the land and structures formerly utilized by the former lumber mill, is currently used as a rally driving training school

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<sup>3</sup> King County, 2008 King County Comprehensive Plan Update Snoqualmie SR-18 / I-90 Area Zoning Study (2007), 2

<sup>4</sup> City of Snoqualmie, Snoqualmie Vicinity Comprehensive Plan 2006 (2009 update), 11.

<sup>5</sup> City of Snoqualmie, Snoqualmie Urban Growth Area Subarea Plan (2001), 21.

<sup>6</sup> Economic Research Associates, Retail Market Analysis for Snoqualmie (3/16/2006), 7.



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facility operated by Ultimate Rally, LLC, doing business as Dirtfish Rally School. The land is currently outside of the city’s boundaries, but within the urban growth area. The City is currently in the process of annexing the area through an Interlocal Agreement with King County. The proposed City zoning to become effective upon annexation is Planned Commercial/Industrial, consistent the City’s current comprehensive plan land use designation for the property.

The school has demonstrated a potential to create tourism opportunities (for example, from the recent nationally-televised RallyCross event and ongoing package tourism opportunities driven by the school’s training program), as well as an emerging vision for the long-term use of the site that could integrate multiple complementary uses. The upcoming annexation of the Mill property by the city, the resulting regulatory framework (e.g., the commercial/industrial zoning designation), and community support for the eventual vision will have an impact on the future of the use of the land.

Access and infrastructure issues present challenges to future site development. The entire site lies within the floodplain, and a portion of the site lies within the floodway. Access to the site from the City of Snoqualmie is limited by a one-lane bridge to the south, and via a minor road to the west. Sewer and solid waste infrastructure will need to be upgraded, though this could be partially addressed by some sort of on-site treatment system in order to mitigate existing infrastructure issues.



*The Dirtfish Rally School occupies approximately 20% of the former Mill site; much of the site remains an untapped potential economic development resource that could be developed strategically over time. The former power plant building (at right) is a registered historic landmark property.*



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### Downtown/Historic Snoqualmie

Very little new development is planned for the downtown area, and the potential for major new retail and commercial development is constrained due to limited vacant or redevelopable land and floodplain/floodway concerns. The Comprehensive Plan specifically directs that “higher intensity uses and densities to higher ground within the city and UGA.”<sup>7</sup> The downtown core does, however, represent a strong base for attracting visitors and remains a tourism destination, especially with regard to the Northwest Railway Museum and landmark railroad depot.

The Downtown Master Plan completed in 2010 mainly advocates maintaining and enhancing the health and vitality of the Downtown as a retail and community center, with a focus more on retaining existing businesses rather than accommodating much additional new capacity. A few parcels were identified for potential development / redevelopment in the document, most notably the 0.36-acre King Street parcel at the intersection of Railroad Ave. SE and SE King St. (a prominent downtown corner location) and one block of Maple Avenue west of the railroad corridor near the new City Hall, which contains a few small vacant parcels. It is expected that significant new development beyond these opportunities is unlikely to occur in the near future.<sup>8 9</sup>

*The historic downtown core along SR-202 / Railroad Avenue includes a number of smaller retail establishments, the Northwest Railway Museum Depot, and park space. The historic downtown is a designated King County landmark district.*<sup>10</sup>

### *Specific Economic Development Priorities and Opportunities*

Economic development priorities in terms of desired sectors are listed on the map included as **Figure 1**, below. In addition to these general industry sectors, the city, along with major stakeholders, has expressed interest in developing a number of specific areas of opportunity, including:

- **Outdoor adventure recreation park:**

The former mill site and vicinity offers an opportunity for a range of tourism and recreation uses in the long term that could be either complementary to or independent of the current use as a high-performance driving school (Dirtfish Rally School). Approximately 20% of the site is in use as the driving school; the rest of the site is vacant or leased to other operators, such as Puget Sound Energy and a small independent masonry shop (neither of which occupy a significant amount of square footage). In its current use, the mill site and the driving school offer proven economic development potential, especially with regard to training and tourism. The school attracts personnel from government agencies as well as private sector groups. Tourism

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<sup>7</sup> City of Snoqualmie, Comprehensive Plan (2009 Update) C.3, Floodplain Land Use.

<sup>8</sup> City of Snoqualmie, Downtown Master Plan (2010) 2.

<sup>9</sup> Snoqualmie City Staff and Mayor, Personal Interview, 6/30/2011.

<sup>10</sup> Downtown Master Plan (2010) 5.

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packages with other local attractions, such as the Salish Lodge are available – the driving school is also exploring the possibility of new package deals with other businesses, including the Casino and Golf Course, to increase the scope of the tourism opportunities.

Possible future uses for the site include an expanded array of recreation activities that capitalize on the location, environmental characteristics, and scenic qualities of the area, including mountain biking, kayaking, and ropes courses. Other potential uses, such as alternative energy production, have been proposed from third parties. However, it is unlikely that a long-term plan will be developed for the site until the annexation process is completed.

- **Outdoor recreation retail**

Given the City's close proximity to the Cascade foothills and a multitude of outdoor recreation areas, such a retail use was mentioned by interviewees as a logical response to demand for outdoor recreation activities in the vicinity of Snoqualmie. Existing retail constraints within the Snoqualmie Ridge Neighborhood Center, which contains about 127k SF of total retail in its core area northwest of Snoqualmie Parkway, have been lifted somewhat by the approval of retail uses in addition to office and light industrial uses for four parcels directly across the Snoqualmie Parkway. However, two of the parcels are constrained by the presence of a PSE transmission line easement that prohibits structures within the corridor. At the time of this writing, nearly half of this area has been purchased and approved for office/light industrial uses, which has reduced the amount of land available for retail uses. Depending on the need for visibility to a large potential customer base, a location in an area closer to I-90 may be more favorable. Downtown may also provide an opportunity for new retail locations, though significant new development opportunities are limited and distance from I-90 is a potential factor.

- **Retirement housing and senior assisted living**

Though these two property types can represent significantly different products, the new Snoqualmie Valley Hospital currently being developed near the I-90/SR-18 interchange could potentially respond to demand for housing for seniors desiring convenient access to medical care. However, strictly residential uses are beyond the scope of this study.

- **Hospitality / Hotel**

Anecdotal evidence from conversations with interviewees as well as documentation from past economic development studies indicate that there is additional potential for hotel uses in Snoqualmie, as well in the area adjacent to the S-21 parcel (the parcel on which the new Snoqualmie Valley Hospital facility is planned), currently outside of the UGA.<sup>11</sup> The high-end Salish Lodge and Spa is currently the only hotel use within city limits and is frequently booked to capacity. As the City works to expand opportunities to capitalize on its tourism potential (for example, at the former mill site), demand for additional accommodation could very likely rise.

- **Continuing Education**

Conversations with city staff and leadership have highlighted a desire for continuing education opportunities within the City of Snoqualmie, such as an extension/branch campus of a local

<sup>11</sup> Retail Market Analysis for Snoqualmie (3/16/2006) 5, 7, 15.



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college or university. Snoqualmie Valley Hospital announced in 2007 its intent to partner with Bellevue College to create a satellite campus that could be included as part of a future hospital development; however, the status of these plans are unclear at this time.<sup>12</sup>

- **Alternative energy development campus**

Third parties have proposed such a concept as a component of a future expansion of uses on the Mill site, which could provide the land area necessary for such a campus. Future development opportunities at the Mill site are purely speculative at this point and will likely only become formalized after the annexation process is completed.

- **Automotive retail and services**

There are a limited number of automotive retail and service businesses within the Snoqualmie city limits or urban growth area. City staff and city leadership noted the lack of auto services in the City and urban growth area. The 2006 ERA Retail Study completed for the City noted that automotive retail and service represented a high level of potential trade area demand near the I-90/SR-18 interchange relative to other uses. In fact, automotive dealers and gasoline, as the use was defined in the ERA study, represented the highest level of potential capture of demand in the S-21 parcel trade area. A 2006 GVA KidderMathews report commissioned by the City to study development potential of the S-21 parcel also documented market demand for highway-oriented retail, which includes automotive retail and service uses.<sup>13</sup>

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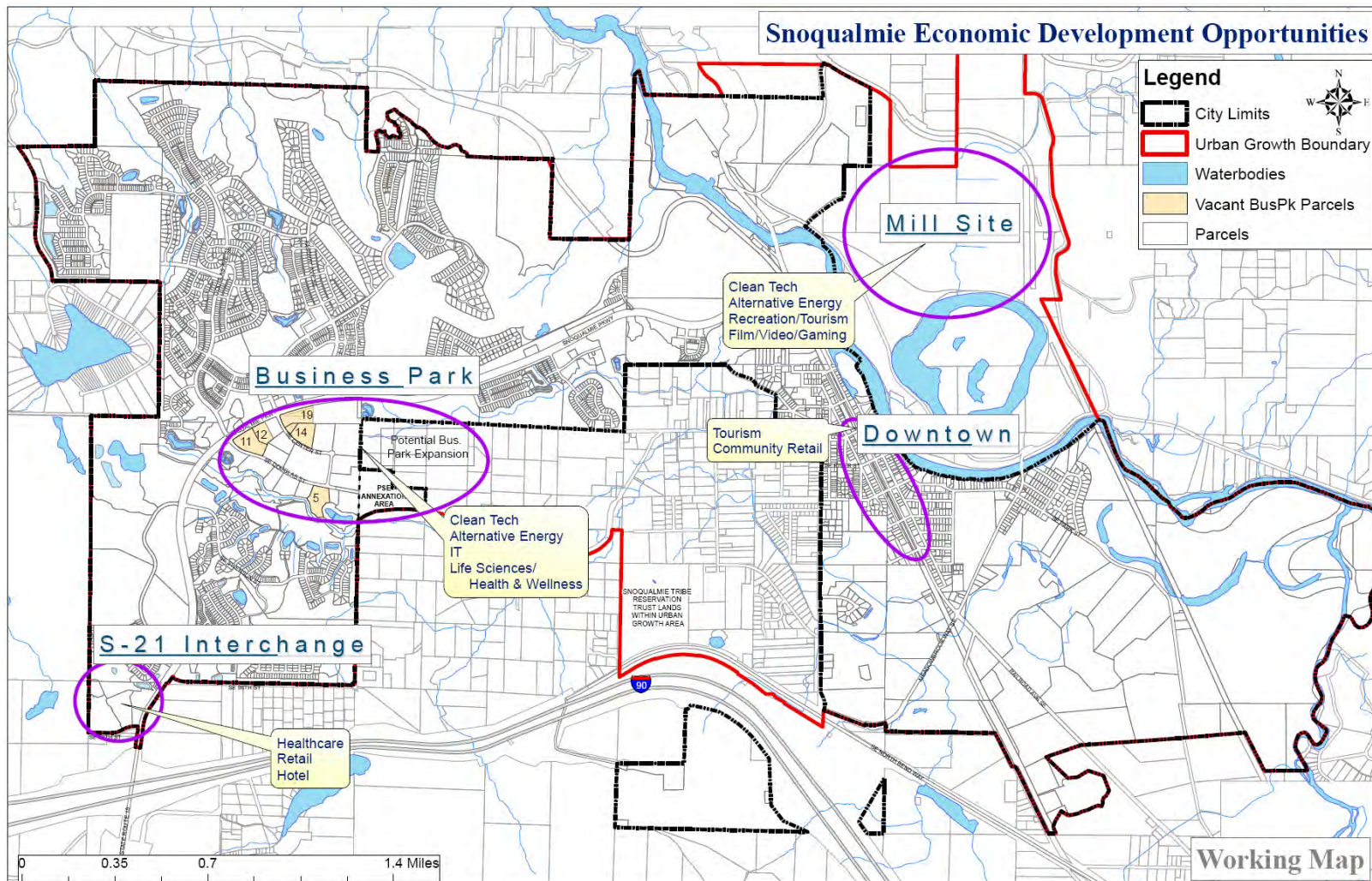
<sup>12</sup> Bellevue College, *King County Public Hospital District No. 4 partners with Bellevue Community College* (8/1/2007). <http://bellevuecollege.edu/news/releases/archives/2007/SnoqualmieValleyHospital8-2-07.asp>  
Accessed 7/11/2011.

<sup>13</sup> GVA Kidder Mathews, *Snoqualmie Ridge Parcels S-11 & S-21 Market Review* (7/14/2006) 2.



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**Figure 1: Snoqualmie Economic Development Opportunities**





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### *General Economic Development Strengths and Opportunities*

Focused interviews were conducted either in-person or over the phone with a number of individuals with specific knowledge of the Snoqualmie and Eastside market, or with knowledge of the specific market sectors identified by the City as being desirable. Economic development strengths mentioned by interviewees during this phase of the study:

- **Geographic location and quality of place.** The natural beauty of the area, along with proximity to outdoor amenities and rural feel, were cited as unique draws for certain types of development. This included the current types of development located in the Ridge Business Park (office, flex office, R&D, light industrial), outdoor recreation-focused retail, and uses focused around recreation and tourism (such as the uses envisioned for the Mill site). The quality of life offered by Snoqualmie was also cited as being potentially appealing for CEOs and company principals looking for an attractive place to live as well as to do business.
- **Competitive rates for office and office flex space.** While Snoqualmie competes with closer-in markets such as Issaquah for office space (and demand usually follows as supply is constrained in these markets), vacant space on the Ridge is currently being offered at very competitive rates, which could provide opportunities for growth in the near term. Flex office/light industrial space is especially competitively-priced against closer-in markets such as the Kent Valley. Moreover, past trends have shown that as lease rates increase in closer-in markets such as Bellevue and space is constrained in Issaquah, there is a tendency for prospective tenants to leap-frog to markets such as Snoqualmie.<sup>14</sup>
- **Good potential for growth in health and wellness services.** Health and wellness is a documented community priority in the Vision 2032 Comprehensive Plan Update, and a number of factors make Snoqualmie a natural fit for services related to health and wellness. This includes a broad range of services ranging from recreation to health clinics to non-profit health organizations. Among those mentioned included by interviewees:
  - Health clinics: Snoqualmie's proximity to natural amenities and the planned new Snoqualmie Valley Hospital facility provide potential for expansion of services related to outpatient care and community-based wellness clinics.
  - Non-profit health services: Seattle and the Puget Sound region has emerged as a center for global health, with significant players such as the Gates Foundation, the University of Washington, Worldvision and a number of smaller players involved in the non-profit health arena. Such entities can be operated with relatively low investment in capital costs, with much work being done electronically.
- **Entrepreneur-friendly and scalable, flexible space for growing businesses.** Interviewees mentioned that Snoqualmie's commercial areas, in particular the Ridge Business Park and the Mill site, are well suited for smaller, innovation-focused companies looking to grow their

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<sup>14</sup> City of Issaquah and Heartland LLC, Central Issaquah Sub-Area Market Assessment (9/23/2008) 4.

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### Project Framework Overview and Retail Leakage Study

operations in an attractive environment. This creates the potential for a critical mass of businesses with symbiotic relationships to grow in close proximity with each other. The flex office space available in the Ridge Business Park is attractive for innovation-focused companies that have a need for production space for products and/or R&D as well as office space for administrative functions. The Mill Site, as mentioned above, has the potential for a suite of complementary activities to locate there in the future, with the theme of recreation or “adventure tourism” as a common thread.

- **Responsive government services and supportive regulatory climate.** Interview respondents mentioned the ease of working with Snoqualmie City staff on permitting and development issues, reasonable taxation rates, excellent infrastructure, and very responsive city services as reasons for locating in Snoqualmie.
- **Above-average income and education profile of the local population.** The Retail Leakage Study included with this report brought to light some of the income characteristics of Snoqualmie residents. For example, 77% of households earn more than \$70,000 per year – more than the King County median household income of \$67,246 per year. 61% of the population over 25 years held a Bachelor’s degree or higher, compared to 45% of the County as a whole.<sup>15</sup>

## Economic Development Limitations and Threats

### *Competition with Other Markets*

Snoqualmie’s competitive position relative to local markets is largely a function of land prices and lease rates, development capacity (i.e., potential for expansion), and distance from other centers of commerce, transportation, and housing. Interviewees cited other Eastside markets such as Issaquah, North Bend, and Preston as the primary competition for retail, office, hospitality, and light industrial uses, though other “close-in” markets such as the Kent Valley were cited as potential competition, especially in the light industrial property market. An overview of major market sectors is below:

### Retail:

Because of the relatively small area of retail development within Snoqualmie, as well as its location away from I-90, Snoqualmie’s retail base lacks both the scale and the visibility to serve as a destination to shoppers outside of the market area defined by the City of Snoqualmie and its urban growth area.

According to the 2006 ERA retail report, Snoqualmie’s retail market primarily serves the local population of Snoqualmie and its employees (79%), with only about 21% of the demand coming from visitors. The report also highlights, for example, that retail sales in North Bend were six times higher than Snoqualmie in 2004; 2010 data from the State of Washington Department of Revenue show that retail sales in North Bend are now about 4.5 times higher than Snoqualmie (see **Figure 2**, below). This may reflect the additional retail that now exists in the Snoqualmie Ridge area, as well as the grocery store, much of which did not exist at the time of publication of the ERA report.

<sup>15</sup> U.S. Census Bureau, 2005-2009 American Community Survey





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**Figure 2: Total Taxable Retail Sales, 2010 – North Bend and Snoqualmie<sup>16</sup>**

**Snoqualmie, Total Taxable Retail Sales, 2010**

Year	Tax Type	NAICS	Total Taxable
2010 Annual	Sales	44	\$15,847,221
2010 Annual	Sales	45	\$8,431,917

Total: **\$24,279,138**

**North Bend, Total Taxable Retail Sales, 2010**

Year	Tax Type	NAICS	Total Taxable
2010 Annual	Sales	44	\$75,856,013
2010 Annual	Sales	45	\$31,114,801

Total: **\$106,970,814**

Source: Washington State Department of Revenue, July 2010

<http://dor.wa.gov/content/AboutUs/StatisticsAndReports/TID/statisticsreports.aspx?query=localsalesnaics>

Similar conclusions to those highlighted in the ERA report relative to the competitive landscape for the retail market can still be drawn, i.e., that retail development is very much determined by location, access, ability to attract anchor tenants, and concentration of retail space. The retail leakage study conducted as part of this scope of work, as well as qualitative information from interviewees confirmed that competition from other local markets, such as Issaquah and North Bend, draws away potential retail spending from Snoqualmie. A 2008 study by Heartland LLC for the City of Issaquah, for example, highlighted the fact that Issaquah contains 2.8M SF of commercial retail space, accounting for 66 percent of the retail space along the I-90 corridor. This powerful retail base, including a significant amount of big-box retail, likely draws consumers from a large Eastside trade area, including Snoqualmie and North Bend.<sup>17</sup>

Interviewees familiar with the Eastside market stressed that competing head-to-head with the sizable retail base of neighboring markets is a difficult proposition, considering geographic location, access limitations, and lack of available land to serve consumers region-wide. Capitalizing on its location and focusing on niche markets, such as outdoor recreation, could help enhance Snoqualmie's retail potential. In addition, as the 2006 ERA study suggested, improved access and visibility, along with a higher concentration of retail space to attract anchor tenants, could also improve the potential for the local retail market.<sup>18</sup> In 2005, the Business Park development standards were amended to allow retail use in addition to office and light industrial uses for four vacant parcels fronting along Snoqualmie Parkway in the Snoqualmie Ridge business park totaling approximately 20 acres of potential retail area (It should also be noted that since beginning this study, nearly half of this area has been purchased and approved for an office/light industrial use). Given the estimated needs for additional retail uses in Snoqualmie per the retail leakage study, the additional capacity afforded by these parcels could provide a means to partially satisfy unmet retail demand for those uses that do not require location in a retail center with an anchor.

<sup>16</sup> Only NAICS categories 44 and 45 were included for simplicity; other uses, such as restaurants, were not included.

<sup>17</sup> Central Issaquah Sub-Area Market Assessment 17-18.

<sup>18</sup> Retail Market Analysis for Snoqualmie 14.



## **City of Snoqualmie – Urban Growth Area Analysis**

### **Project Framework Overview and Retail Leakage Study**

The retail leakage study provides insights on categories of consumer spending that are currently not being met by Snoqualmie-area retailers and helps to gauge the degree to which retail dollars are being captured within the community by residents. As noted in the study, retail leakage alone does not specify where outside spending is being directed; it is limited to estimating what types of products consumers in Snoqualmie are buying elsewhere. Additional market research could be done to confirm the potential of specific retail categories that might operate profitably in Snoqualmie.

#### **Commercial Office:**

Most of Snoqualmie's office properties are located in the Ridge Office Park. Several buildings are a mix of traditional office and flex-office, which include floor plans that can accommodate, for example, light industrial, R&D, or technical uses (such as T-Mobile's network center) along with office space. The Ridge Office Park also includes condominium office space, typically in the vicinity of 2,000 - 3,000 SF, for small businesses that require flexible space for office or other uses.

Interviews with individuals knowledgeable about the local market provided some insight on advantages and disadvantages for locating in Snoqualmie versus other local markets, along with impressions of the potential for new growth. Potential office tenants typically seek space proximate to closer-in markets (such as Issaquah) first, and as demand rises and vacancy rates fall, Snoqualmie generally becomes a more attractive location for users seeking office space at competitive lease rates. Issaquah, for example, presently has a good deal of capacity for office with lease rates typically priced \$6-\$8 / SF higher than Snoqualmie, but the current state of the office market typically drives users to closer in markets. However, supply tightening in these closer-in markets could drive users to sacrifice proximity to larger urban centers for lower lease rates and locational benefits in markets such as Snoqualmie. This was highlighted in the 2008 Heartland report on the Issaquah market, which mentioned the under-supply of available space in that market at the time, resulting in "leapfrogging" of tenants from closer-in markets such as Bellevue directly to the smaller Snoqualmie market.<sup>19</sup>

The perception often mentioned by interviewees that Snoqualmie is "too far out" continues to be a hurdle when marketing available space to prospective tenants. However, interviewees also mentioned other qualities not related directly to financial considerations that could fit tenants' other priorities, such as proximity to local amenities including the golf course, trails, excellent views, and a semi-rural setting, ease of working with city staff, good infrastructure, and proximity to housing for employees.

#### **Flex Office, Including Tech, R&D, and Light Industrial:**

The Snoqualmie Ridge business park has a number of buildings that support office, light industrial, R&D and related uses in a single facility. This "flex office/industrial" use is attractive for companies that need space for production, R&D, or technical uses as well as maintain office space for administrative operations. The Snoqualmie Venture Commerce center, which caters to small businesses seeking flexible space, includes condo-style work lofts that can also serve in this capacity.

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<sup>19</sup> Central Issaquah Sub-Area Market Assessment 4.



## **City of Snoqualmie – Urban Growth Area Analysis**

### **Project Framework Overview and Retail Leakage Study**

Similar to the office market, competition for light industrial space comes from closer-in markets, such as the Kent Valley. However, closer-in space for flex office/industrial is relatively expensive compared to the Snoqualmie market, which provides an opportunity for midsize technical/engineering firms, such as Technical Glass (specialty glass products), Zetech (non-destructive testing), and Microconnex (flexible circuitry) to locate and headquarter their operations in Snoqualmie Ridge. Other larger companies, such as T-Mobile and, until recently, Philips, utilize space for both office as well as flex/light industrial space.

#### **Hospitality**

Currently, there is one hotel within the City limits (the Salish Lodge). Interviews conducted as part of this study and recent articles in local media have suggested a lack of local capacity for additional tourism demand.<sup>20 21</sup> Other options for accommodations near Snoqualmie do exist, namely a handful of relatively small motels in North Bend. According to anecdotal information provided in interviews, there has been some interest in the mid-range hotel market in the Snoqualmie Ridge area, such as an “Extended Stay” hotel, but so far financing difficulties and uncertainties with market demand have prevented ownership groups from moving forward with development. The Snoqualmie Casino has included a plan for a hotel in its master plan, although there are no immediate plans to build. The Salish Lodge, owned by the Muckleshoot Tribe, has also expressed interest in expanding its facility with up to 250 rooms, but like the Snoqualmie Tribe has not released any immediate plans to do so.

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<sup>20</sup> *Financing difficulties stymie plans for North Bend hotel, Snoqualmie Valley Star* 2/2/2011: 6

<sup>21</sup> Snoqualmie City Staff and Mayor, Personal Interview, 6/30/2011



## City of Snoqualmie – Urban Growth Area Analysis

### Project Framework Overview and Retail Leakage Study

#### *Physical and Regulatory Limitations to Growth within the UGA*

Several notable physical barriers to future growth exist that relate both to physical as well as regulatory constraints. These include:

- The Snoqualmie River floodway and floodplain;
- Land with critical area constraints (steep slopes, wetlands, streams and their buffers)
- Questions regarding future jurisdiction of parcels within the UGA but outside of the City limits (i.e., land under tribal ownership that may eventually become trust land);
- Land likely to be removed from the UGA because of its status as being in use for resource extraction; and
- Regulatory and hazard limitations to development.

The floodplain and floodway that cover much of the city are major constraints to development. As a result of this, the city has focused its development priorities away from the floodplain/floodway and toward Snoqualmie Ridge. Areas within the UGA and zoned for future development should not necessarily be considered developable. For example:

- If annexation of the Mill planning area is approved as anticipated, a significant amount of land within the annexation area will be zoned for low-intensity open space uses, due to its location with the FEMA 100 year floodway;
- A 78-acre portion of the current UGA, currently designated for future commercial and light industrial development in the City's comprehensive plan is expected to be removed from the UGA. The City submitted a docket requesting the amendment to remove the area as it is an active gravel mine subject to a long term permit and property lease. The Area Zoning Study prepared for this King County Comprehensive Plan Amendment recommends its approval.
- Large parcels of land at the intersection of Meadowbrook Way SE and SE North Bend Way currently zoned for office park uses are now owned by the Snoqualmie Indian Tribe;
- Much of the area around the historic downtown is located in the floodway, where regulations prohibit or severely limit development, or in the floodplain, where significant future development is discouraged due to flood hazard concerns;
- Due to existing entitlements, vacant parcels within the Snoqualmie Ridge Business Park which now permit certain retail uses, are not designated exclusively for retail uses and are being actively marketed for the full range of allowable business park uses, including office and light industrial uses.
- Due to existing development agreements for large master-planned areas the City cannot unilaterally change zoning or development standards to increase retail land capacity.

The next phase of work will examine specifically the amount of land available for development within the UGA considering these and other limitations.



## City of Snoqualmie – Urban Growth Area Analysis Project Framework Overview and Retail Leakage Study

### Institutional Uses

In addition to commercial uses, this study will also examine the City's ability to provide sufficient land for other non-residential uses such as schools, parks, healthcare, and other essential government facilities. Estimates for future needs for these uses were drawn from the comprehensive plan, as well as from conversations with City staff.

*Schools:* The 2010 Snoqualmie Valley School District Capital Facilities Plan states that “An inventory of current district facilities in permanent and temporary capacity indicates a capacity to house 6,582 students (with an inventory of permanent capacity for 5,162 students and relocatable capacity to house 1,420 additional students). The October enrollment for the 2009 – 2010 School Year was 5,669 full-time-equivalent students.” The District expects enrollment to continue growing by an average of 6.96% over the next six years due in part to the continuing home construction in the Snoqualmie Ridge as well as growth in North Bend.

As a result of this projected growth, two new schools, a middle school and elementary school, are currently planned for the Ridge. The two parcels total approximately 40 and 20 acres, respectively. New bond proposals will be needed to accommodate these new facilities and any additional projected growth in student enrollment in the District.

*Parks and Open Space:* A significant amount of land to the west, south, and east of the Mill Pond is being considered for open space designation, once the annexation of the land around the Mill area is completed. This land is currently owned by Weyerhaeuser. One additional community park, totaling approximately 16 acres, is planned for Snoqualmie Ridge as part of new residential development.

*Hospital/Healthcare facilities:* A new Snoqualmie Valley Hospital is planned for the approximately 9-acre “S-21” parcel near the I-90/SR-18 interchange and inside the UGA boundary. The new facility will likely be 65,000 – 70,000 square feet in size. The new hospital would replace the 30,000 SF, 25-bed facility located near the junction of Meadowbrook Ave. SE and SE North Bend Way that the Snoqualmie Valley Hospital District sold to the Snoqualmie Indian Tribe in 2009. New construction of the facility is likely to begin within a year, and could be occupied within three years.

*Higher Education/Continuing Education facilities:* The City of Snoqualmie has maintained its strong desire to attract a similar type and size of campus for higher education or continuing education purposes. Such a campus could provide local opportunities for job training and employment for Snoqualmie and East King County area residents and significantly reduce vehicle miles travelled.

*Other government facilities:*

Interviews with City staff have indicated that additional future public facility needs (beyond those noted above) will likely be limited in the near future to a new YMCA Community Center (in an existing park space), as well as two mini parks on the Ridge (approximately .5 acres apiece).





## City of Snoqualmie – Urban Growth Area Analysis Project Framework Overview and Retail Leakage Study

### General Economic and Population Growth Forecasts

#### *Population Projections*

The most recent 20-year population projections for 2032, based on the 2010 census and in-city calculations, are as follows:

- Low: 14,807
- Medium: 15,508
- High: 16,046

#### *Employment Projections*

King County's most recent employment growth target for Snoqualmie for the 25-year period between 2006 and 2031 is 1,050 new jobs. This reflects a downward revision from the previous job growth target of 1,800 new jobs, included in the 2007 King County Buildable Lands Report. Conversations with regional planners have attributed this revision at least partly to current economic conditions; other conversations with City staff and review of Countywide Planning Policies point to the possibility that these revisions are also the result of more employment growth being directed toward urban centers. Snoqualmie is considered a "rural city" or "small city" for County/regional planning purposes, respectively; County policies and the Vision 2040 Regional Growth Strategy prioritize employment growth first in Urban Centers and encourage them to take on a larger share of residential and employment growth.

The City of Snoqualmie has also updated its own employment targets as part of the Comprehensive Plan update process. These projections are being made available for the purpose of this study and will be used in the next phases of work to estimate future capacity for non-residential uses within the City.



## **City of Snoqualmie – Urban Growth Area Analysis**

### **Project Framework Overview and Retail Leakage Study**

#### **Part II: Retail Leakage Study for the Snoqualmie Market Area**

*(Included following this page)*



## **City of Snoqualmie – Urban Growth Area Analysis**

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## City of Snoqualmie – Urban Growth Area Analysis Retail Leakage Analysis

### Introduction and Purpose

The City of Snoqualmie contracted with CollinsWoerman to perform a retail leakage study as part of a broader Urban Growth Area analysis. The purpose of the study is to determine whether the existing retail in Snoqualmie is able to meet the needs (i.e. demand) of residents, and if not, how much is being “leaked” to retailers in other cities. Understanding Snoqualmie’s ability to capture local retail spending is a key concern for a number of reasons, such as the ability to generate tax revenue and to provide local shopping options that reduce the need to travel to other communities (i.e. embracing smart growth and limiting climate change impacts).

In addition, the study is intended to quantify the land use implications of retail leakage by estimating how much land would be required to accommodate the additional development needed to meet currently unfulfilled local demand. The insights provided by the retail leakage study provide a foundation that will be used for later phases of work that will look more closely at how and where Snoqualmie can accommodate needed retail development.

Note: The Excel files used to produce the tables in this report will be made available to City of Snoqualmie staff.

### Methodology

The method used for the retail leakage study has four primary elements:

- (1) Estimate how much City of Snoqualmie households spend in a typical year on retail goods
- (2) Estimate the annual retail business sales within the City of Snoqualmie
- (3) Compare these estimates to determine how much retail spending is being “leaked” to other communities
- (4) Estimate the amount of new retail development needed to accommodate the spending that is currently being leaked. Describe this additional needed retail in terms of building floor area/ number of stores *and* the land required to develop it.

An important aspect of this study is taking into account the different spending habits of households across the range of incomes present in Snoqualmie. This is essential to accurately estimate how much Snoqualmie households likely spend in a given year. A variance table (Appendix B) was prepared to show how much households at different income levels spend when compared to the average household all across incomes. The variances in this table are built into the calculations used to estimate total local potential spending. On its own, the variance table is also a valuable tool for retail planning and understanding the spending patterns of households. For example, it shows retail categories where high income households spend much more than the average household, such as furniture and flooring.

A key goal of the study was to use the most recent data available. This is especially important because Snoqualmie has recently experienced rapid transformation. Many economic analyses commissioned by the City during the past decade are quickly growing out of date. Below are a few notes with regard to the data used to perform the retail leakage study.

- The Consumer Expenditure Survey data used to estimate per-household spending is from 2008-2009. This is the most current data available. It was not adjusted for inflation due to the overall



## City of Snoqualmie – Urban Growth Area Analysis Retail Leakage Analysis

stagnation of consumer prices during the 2009 to 2010 time period.

- The Washington State Department of Revenue taxable sales data cover all of 2010. This data is presented by NAICS category (an explanation of each category is available at <http://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2007>). While the original intention of the study was to use 3-digit NAICS codes, it became necessary to use data disaggregated to the 4-, 5, and 6-digit level. This was essential for understanding the type of retail sales within the data, and more importantly, disaggregation made it possible to match those sales to spending categories used in the Consumer Expenditure Survey.
- The Census data used to determine the number of households is from 2010.
- The Census data used to estimate household incomes in Snoqualmie is from the 2005-2009 American Community Survey.
- The data used to estimate per-store sales and typical store sizes come from *The Dollars & Cents of Shopping Centers: 2004* published by the Urban Land Institute. While newer editions are available, the 2004 version of this report was used because it was available free of charge and the sales value contained within the report could easily be adjusted to 2010 using Consumer Price Index data for the Seattle area.

### Assumptions and Limitations

It is important to remember that the retail leakage study is a simplified tool to gauge how much spending potential a city is losing to retailers in other communities. The study does not take into account many of the complexities that characterize retail spending. For example, the study does not differentiate between retail sales made to local residents versus those made to visitors to the city. Likewise, the spending potential for Snoqualmie is estimated based only on the number of households and their incomes and does not take into account the spending potential of local employees or visitors. Most of the limitations in the study are due to the lack of data. For example, the Consumer Expenditure Survey, which is the primary source of estimates for household spending, does not describe *where* consumers do their spending (e.g. local stores, online shopping, etc.).

The retail leakage study should be used as a general foundation for understanding big-picture economic conditions. It should not be used as a justification for undertaking specific retail development without first taking into account the many additional factors that affect consumer spending and market feasibility.



## City of Snoqualmie – Urban Growth Area Analysis Retail Leakage Analysis

### Summary of Findings

The retail leakage study performed by CollinsWoerman confirmed much of the anecdotal evidence suggested by City staff and reaffirms many of the conclusions drawn in earlier economic analyses performed for Snoqualmie.

#### *Leakage*

In the retail categories included in the study, the **city of Snoqualmie leaks approximately 73% of its residents' retail spending\***. It is apparent that the current retail businesses in Snoqualmie are significantly unable to meet the purchasing demands of local households. The degree to which retail spending is being leaked varies across the categories, as shown in Table 3. It appears that Snoqualmie does a much better job capturing resident spending on groceries and restaurants than other categories, such as vehicle purchases and major appliances which leak over 90% to retailers in other communities. **In only one category, floor coverings, does Snoqualmie actually show a gain in spending** (i.e. the city's retailers are not only able to meet local demand, but also outside demand as well).

Even though the percentage of grocery spending leaked is relatively modest compared to other retail categories, it is important to pay attention to the overall value of the spending being leaked. At 57% leakage, **approximately \$12.6m of annual grocery spending among Snoqualmie household is not being captured. Apart from the purchase of new and used automobiles, groceries are the largest single source of retail leakage in Snoqualmie.** Other categories with major leakage including clothing and gas station purchases, with each representing over \$10m in uncaptured spending.

Top 5 Retail Categories by Total Amount of Spending Leaked		
	Total Amount Leaked	% of Potential Spending Leaked
Vehicle purchases (net outlay)	\$ (16,291,016)	99%
Groceries, including alcohol for home consumption	\$ (12,587,833)	57%
Gas stations (gas, oil, convenience store purchases, tobacco)	\$ (10,785,789)	85%
Clothing, shoes, jewelry and accessories	\$ (10,663,689)	91%
Restaurants, bars, and catering	\$ (9,468,188)	49%

*\*A few categories of retail sales contained in the Department of Revenue data were excluded from this study, as cited at the bottom of Table 1. These exclusions were due to a lack of clarity regarding the business(es) reporting the sales (e.g. "All Other Miscellaneous Store Retailers) and the subsequent difficulty of matching those sales to categories in the Consumer Expenditure Survey.*

#### *Retail Space and Land Needed*

While the retail leakage values are insightful on their own (i.e. estimating uncaptured potential sales tax revenue), it is valuable to go one step further and understand the potential land use implications. In this portion of the study the leakage amounts are translated into square feet of needed retail space based on published data that describe typical stores sizes and the amount of sales per square foot (see Appendix C).



## City of Snoqualmie – Urban Growth Area Analysis Retail Leakage Analysis

As shown in Table 5, **approximately 270,000 sq. ft. of additional retail development would be needed to meet the spending of Snoqualmie households that is currently being leaked.** For each retail category, the table provides an estimate of how many additional stores would be needed to eliminate leaked retail spending. In some cases the number of stores needed is relatively low given the size of the typical store. For example, **Snoqualmie needs just over one new supermarket (at around 35,000 sq. ft.) to capture leaked spending for groceries, housekeeping supplies, and personal care products.**

Table 5 shows the conversion of retail space needed into the overall amount of land required to develop and accommodate that space. The study assumes (for most categories) that retail development would be built with a Floor Area Ratio (FAR) of 0.3. This assumption was developed after reviewing recent retail patterns in the Snoqualmie Ridge neighborhood and taking into account that there are limited opportunities for more dense infill development in downtown Snoqualmie. The FAR of 0.3 is likely to be achieved with retail development that is 1 to 2 stories, served by surface parking, and includes a modest amount of landscaping and open space. The land needed to accommodate gas stations and car dealerships was determined using different methods, as noted at the bottom of the table.

Overall, the retail spending currently being leaked in Snoqualmie equates to around 23 acres of development. Perhaps surprisingly, one of the retail categories that would require the most amount of land is clothing, shoes and accessories. **Just over four acres of land would be needed to develop the amount of retail space needed to capture currently leaked clothing and shoe expenditures.** Other retail categories with significant land needs to address leaked spending including grocery stores, gas stations, and pet/toy/hobby stores. Other categories, such as furniture and vehicle parts/maintenance stores, would require half an acre or less.

Based on the land needs shown in Table 5, it is now possible to go to the next step of determining whether there is adequate land capacity in Snoqualmie to develop additional retail and capture lost household spending. This step will need to take into account not only the overall quantity of available land, but other factors such as accessibility and market requirements as well.



## City of Snoqualmie – Urban Growth Area Analysis Retail Leakage Analysis

Table 1

### Taxable Retail Sales for the City of Snoqualmie

#### 2010 Annual Sales, Washington State Department of Revenue <sup>(1)</sup>

NAICS	Description	Total Taxable Sales	Units (2)	# of Units Not Disclosed	Estimated Sales of Non-Disclosed Units
4411	Automobile dealers	\$89,272	9		
4412	Other motor vehicle dealers	\$117,595	11		
4413	Automotive Parts, Accessories, and Tire Stores	\$88,949	27		
8111	Automotive Repair and Maintenance	\$2,152,813	35		
4421	Furniture Stores	\$1,127,745	44		
44221	Floor Covering Stores	\$711,634	26		
44229	Other Home Furnishings Stores	\$442,711	29		
443111	Household Appliance Stores	\$147,036	15		
443112	Radio, Television, and Other Electronics Stores	\$1,942,907	30		
44312	Computer and Software Stores	\$2,649,053	77		
44313	Camera and Photographic Supplies Stores	\$2,722	3		
4441	Building Material and Supplies Dealers	\$2,362,006	89		
4442	Lawn and Garden Equipment and Supplies Stores	\$177,534	29		
44511	Supermarkets and Other Grocery (except Convenience)	\$2,373,106	3		
44512	Convenience Stores	D	D	1	\$286,372
4452	Specialty Food Stores	\$326,619	7		
4453	Beer, Wine, and Liquor Stores	\$27,453	37		
4461	Health and Personal Care Stores	\$273,715	63		
4471	Gasoline Stations (with and without conv stores)	\$1,660,786	5		
4481	Clothing Stores	\$857,467	83		
4482	Shoe Stores	\$131,892	14		
4483	Jewelry, Luggage, and Leather Goods Stores	\$50,647	12		
45111	Sporting Goods Stores	\$259,421	47		
45112	Hobby, Toy, and Game Stores	\$70,906	15		
45114	Musical Instrument and Supplies Stores	\$113,496	10		
45121	Book Stores and News Dealers	\$32,504	26		
45122	Prerecorded Tape, Compact Disc, and Record Stores	\$57,146	8		
4531	Florists	\$194,753	5		
4532	Office Supplies, Stationery, and Gift Stores	\$382,387	51		
45391	Pet and Pet Supplies Stores	\$274,539	8		
7221	Full-service restaurants	\$3,820,022	23		
7222	Limited service eating establishments	\$4,965,714	25		
72232	Caterers	\$330,645	12		
7224	Drinking places (alcohol)	\$839,243	4		
		\$29,054,438			

#### Taxable Sales Excluded from the Retail Leakage Analysis

45399	All Other Miscellaneous Store Retailers	\$2,308,405	288		
45291	Warehouse Clubs and Supercenters	D	D	2	\$289,533
45299	All Other General Merchandise Stores	\$32,187	3		
4521	Department Stores	\$504,999	4		
4533	Used Merchandise Stores	\$90,717	12		
45439	Other Direct Selling Establishments	\$947,565	153		
72231 & 72233	Food Service Contractors & Mobile Food Services			4	\$198,433
		\$3,883,873			\$487,966
Total Sales Excluded				\$4,371,839	

#### Notes:

(1) Sales data accessed at <http://dor.wa.gov/content/AboutUs/StatisticsAndReports/TID/statisticsreports.aspx?query=localsalesnaics>

(2) A "unit" represents a single taxpayer, including businesses that report no activity. Because state taxes are not reported based on geographic location, the unit count for the state tax data does not reflect the actual number of business establishments. For example, Firm A has five branches located in five different cities and each location is subject to taxation. However, Firm A will only submit one tax return on behalf of all five locations and will only show up as one taxpayer in the unit count.





## City of Snoqualmie – Urban Growth Area Analysis Retail Leakage Analysis

Table 2

### Expected Annual Spending By Income Bracket & Purchase Category <sup>(1)</sup>

(Number of Households x Average Annual Household Spending x Income Variance)

Category	Average Annual Spending Per Household <sup>(2)</sup>	Less than \$5,000	\$5,000 to \$9,999	\$10,000 to \$14,999	\$15,000 to \$19,999	\$20,000 to \$29,999	\$30,000 to \$39,999	\$40,000 to \$49,999	\$50,000 to \$69,999	\$70,000 and more
		Percent of Snoqualmie Households in Each Income Bracket <sup>(2)</sup>								
		0.55%	0.55%	0.30%	1.10%	3.15%	4.08%	4.07%	9.20%	77.00%
		Number of Snoqualmie Households in Each Income Bracket <sup>(3)</sup> <sup>(4)</sup>								
		20	20	11	39	112	145	144	326	2,731
Groceries <sup>(5)</sup>	\$5,049	\$64,323	\$59,978	\$40,878	\$128,308	\$436,682	\$566,144	\$672,278	\$1,571,728	\$18,524,005
Restaurants, bars, and catering	\$3,872	\$39,088	\$28,238	\$16,615	\$58,306	\$224,468	\$386,748	\$475,381	\$1,221,521	\$16,973,448
Housekeeping supplies	\$741	\$9,441	\$7,602	\$6,424	\$16,203	\$61,087	\$77,775	\$87,157	\$242,945	\$2,811,732
Home maintenance, repairs, & other expenses <sup>(6)</sup>	\$1,484	\$16,794	\$12,360	\$7,214	\$30,480	\$117,058	\$126,096	\$129,559	\$451,867	\$6,554,154
Furniture <sup>(7)</sup>	\$486	\$3,069	\$4,630	\$2,569	\$11,483	\$24,548	\$34,543	\$46,988	\$140,734	\$2,289,099
Floor coverings <sup>(7)</sup>	\$46	\$197	\$818	\$77	\$1,184	\$1,776	\$3,555	\$5,632	\$6,130	\$248,634
Major appliances <sup>(7)</sup>	\$301	\$1,687	\$2,570	\$1,344	\$4,498	\$17,788	\$26,018	\$37,644	\$100,767	\$1,326,912
Miscellaneous household equipment <sup>(7)</sup>	\$1,133	\$9,162	\$7,763	\$7,302	\$20,596	\$55,954	\$117,133	\$167,454	\$285,325	\$5,038,558
Clothing, shoes, jewelry and accessories	\$2,464	\$18,496	\$15,688	\$24,969	\$57,703	\$167,750	\$235,621	\$268,975	\$751,492	\$10,163,001
Vehicle purchases (net outlay)	\$3,395	\$23,173	\$18,047	\$10,606	\$48,366	\$248,978	\$477,679	\$351,202	\$1,264,652	\$13,937,584
Gas stations (gas, conv. store purchases, tobacco)	\$2,796	\$27,006	\$25,565	\$13,425	\$62,076	\$214,566	\$333,083	\$399,683	\$995,206	\$10,662,338
Vehicle Maintenance and repairs <sup>(8)</sup> <sup>(9)</sup>	\$860	\$7,433	\$5,696	\$3,363	\$17,909	\$59,552	\$96,961	\$111,015	\$317,187	\$3,449,493
Audio and visual equipment and services	\$1,415	\$18,881	\$11,253	\$6,777	\$27,464	\$95,031	\$161,490	\$168,957	\$517,275	\$5,637,714
Pets, toys, hobbies, and playground equipment	\$1,201	\$10,690	\$5,631	\$4,985	\$17,246	\$77,118	\$89,594	\$107,894	\$287,114	\$6,017,069
Other entertainment supplies, equipment, & services	\$817	\$7,939	\$6,029	\$2,054	\$5,020	\$39,845	\$80,753	\$99,129	\$376,046	\$3,391,798
Personal care products and services	\$833	\$10,100	\$6,505	\$4,206	\$17,599	\$54,190	\$81,068	\$89,797	\$236,613	\$3,685,830
Reading materials	\$218	\$2,630	\$1,364	\$1,133	\$5,454	\$15,432	\$19,507	\$24,985	\$65,708	\$927,187

Notes:

(1) The income brackets presented here are those used in the Consumer Expenditure Survey (CEX). The household income data presented in the U.S. Census/American Community Survey uses different income brackets and was therefore adjusted to match the CEX. In doing this adjustment, it was assumed that households were evenly distributed within each Census income bracket.

(2) Household expenditure data comes from the Consumer Expenditure Survey, Selected Western Metropolitan Statistical Areas, 2008-2009 for Seattle unless otherwise noted.

(3) Household income data from U.S. Census, American Community Survey, 2005-2009.

(4) Total household count from U.S. Census, Profile of General Population and Housing Characteristics: 2010. Table DP-1.

(5) Includes alcohol for home consumption. Calculated using [http://www.ers.usda.gov/briefing/cpi/foodandexpenditures/data/Expenditures\\_tables/table4.htm](http://www.ers.usda.gov/briefing/cpi/foodandexpenditures/data/Expenditures_tables/table4.htm)

(6) Estimate based on national Consumer Expenditure figure adjusted to the median household income of Snoqualmie and subtracting \$696 for property insurance (based on the 2010 American Housing Survey).

(7) Household spending potential estimated based on the Household Furnishing sub-category shares for the West region found in the CEX Region of Residence table.

(8) Consumer Expenditure Survey, 2009. Region of Residence, Table 8.

(9) Includes repair and maintenance service.



## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

Table 3

#### Estimate of Retail Leakage in Selected Categories for the City of Snoqualmie

Category	Average Annual Spending Per Household	Actual 2010 Spending by Snoqualmie Households (1)	Total Expected Spending	Estimated Gain/(Leak)	% of Expected Spending Leaked (values < 100%) or Gained (values > 100%)
Groceries, including alcohol for home consumption (2) (3)	\$5,049	\$9,476,491	\$22,064,324	\$ (12,587,833)	57%
Restaurants, bars, and catering	\$3,872	\$9,955,624	\$19,423,812	\$ (9,468,188)	49%
Housekeeping supplies	\$741	\$559,921	\$3,320,367	\$ (2,760,446)	83%
Home maintenance, repairs, and other expenses (4)	\$1,484	\$2,362,006	\$7,445,583	\$ (5,083,577)	68%
Furniture (5)	\$486	\$1,127,745	\$2,557,662	\$ (1,429,917)	56%
Floor coverings (5)	\$46	\$711,634	\$268,003	\$ 443,631	166%
Major appliances (5)	\$301	\$147,036	\$1,519,228	\$ (1,372,192)	90%
Miscellaneous household equipment (5)	\$1,133	\$2,843,806	\$5,709,247	\$ (2,865,441)	50%
Clothing, shoes, jewelry and accessories	\$2,464	\$1,040,006	\$11,703,695	\$ (10,663,689)	91%
Vehicle purchases (net outlay)	\$3,395	\$89,272	\$16,380,288	\$ (16,291,016)	99%
Gas stations (gas, oil, convenience store purchases, tobacco)	\$2,796	\$1,947,158	\$12,732,947	\$ (10,785,789)	85%
Vehicle maintenance and repairs (6) (7)	\$860	\$2,241,762	\$4,068,609	\$ (1,826,847)	45%
Audio and visual equipment and services	\$1,415	\$2,113,549	\$6,644,842	\$ (4,531,293)	68%
Pets, toys, hobbies, and playground equipment	\$1,201	\$345,445	\$6,617,341	\$ (6,271,896)	95%
Other entertainment supplies, equipment, and services	\$817	\$379,738	\$4,008,615	\$ (3,628,877)	91%
Personal care products and services	\$833	\$273,715	\$4,185,909	\$ (3,912,194)	93%
Reading materials	\$218	\$32,504	\$1,063,400	\$ (1,030,896)	97%
		<b>\$35,647,412</b>	<b>\$129,713,872</b>	<b>\$ (94,066,460)</b>	<b>73%</b>

Notes:

(1) Accessed at <http://dor.wa.gov/content/AboutUs/StatisticsAndReports/TID/statisticsreports.aspx?query=localsalesnaics>

(2) Actual household spending for groceries calculated by multiplying taxable sales by 3.5 to account for non-taxable sales in grocery stores, bakeries, etc.

(3) Includes alcohol for home consumption. Calculated using [http://www.ers.usda.gov/briefing/cpifoodandexpenditures/data/Expenditures\\_tables/table4.htm](http://www.ers.usda.gov/briefing/cpifoodandexpenditures/data/Expenditures_tables/table4.htm)

(4) Estimate based on national Consumer Expenditure figure adjusted to the median household income of Snoqualmie and subtracting \$696 for property insurance (based on the 2010 American Housing Survey).

(5) Household spending potential estimated based on the Household Furnishing sub-category shares for the West region found in the CEX Region of Residence table.

(6) Consumer Expenditure Survey, 2009. Region of Residence, Table 8.

(7) Includes repair and maintenance service.

## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

Table 4

#### Estimate of Additional Retail Stores Needed

Category	Estimated Annual Sales per Store Type	Estimated Annual Leakage in Snoqualmie	Additional Stores Needed
Groceries			
Housekeeping supplies	\$16,235,817	\$ (19,260,473)	1.2
Personal care products and services			
Restaurants, bars, and catering	\$1,143,514	\$ (9,468,188)	8.3
Home maintenance, repairs, and other expenses	\$1,131,874	\$ (5,083,577)	4.5
Furniture	\$749,616	\$ (1,429,917)	1.9
Floor coverings	\$951,849	\$ 443,631	-
Major appliances	\$979,138		
Miscellaneous household equipment		\$ (4,237,633)	4.3
Clothing, shoes, jewelry and accessories	\$430,214	\$ (10,663,689)	24.8
Vehicle purchases (net outlay)	\$28,123,000	\$ (16,291,016)	0.6
Gas stations (gas, conv. store purchases, tobacco)	\$3,031,056	\$ (10,785,789)	3.6
Vehicle maintenance and repairs	\$879,460	\$ (1,826,847)	2.1
Audio and visual equipment and services	\$867,413	\$ (4,531,293)	5.2
Pets, toys, hobbies, and playground equipment	\$385,915	\$ (6,271,896)	16.3
Other entertainment supplies, equipment, & services	\$954,969	\$ (3,628,877)	3.8
Reading materials	\$1,820,979	\$ (1,030,896)	0.6

## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

Table 5

#### Land Needed to Accommodate Additional Retail

Category	Median Size	Additional Stores Needed	Sq. Ft. Of Building Area Needed	Land Needed Assuming Overall 0.3 FAR
Groceries				
Housekeeping supplies	34,187	1.2	40,556	135,186
Personal care products and services				
Restaurants, bars, and catering (1)	3,200	8.3	26,496	88,319
Home maintenance, repairs, and other expenses	6,800	4.5	30,541	101,803
Furniture	4,000	1.9	7,630	25,434
Floor coverings	4,130	-	-	-
Major appliances				
Miscellaneous household equipment	3,104	4.3	13,434	44,780
Clothing, shoes, jewelry and accessories	2,200	24.8	54,531	181,771
Vehicle purchases (net outlay) (2) (3) (4) (5)	21,000	0.6	12,165	73,250
Gas stations (gas, conv. store purchases, tobacco) (6)	2,000	3.6	7,117	103,337
Vehicle maintenance and repairs	3,450	2.1	7,166	23,888
Audio and visual equipment and services	2,700	5.2	14,105	47,015
Pets, toys, hobbies, and playground equipment	2,034	16.3	33,057	110,189
Other entertainment supplies, equipment, & services	4,318	3.8	16,408	54,695
Reading materials	10,093	0.6	5,714	19,046
			268,919 sq. ft.	1,008,712 sq. ft.
			6.17 acres	23.2 acres

(1) 60% of total area assumed for seating; occupancy based on 15 sq. ft. per occupant.  
<http://www.jhcarr.com/Support/ergonomics.PDF>

(2) Based on data from National Automobile Dealers Association, State of the Industry Report, 2011, an average dealership with \$16.29m in sales would sell approximately 278 new and 336 used vehicles annually, in addition to services provided. Given an assumed average of 60 days of supply, the dealership would have approximately 100 vehicles at any given time.

(3) Average dealership building size: <http://www.reedconstructiondata.com/rsmeans/models/auto-sales/washington/seattle/>

(4) Assumed parking for dealership display lot is 400 sq ft per vehicle x 100 vehicles; assumed employee and customer parking is 1 space per 500 sq ft of building floor area.

(5) Land needed assumes buffer/landscaping equal to 20% of the area covered by building footprint and parking.

(6) Gas stations assumed to require 2/3 acre per store.



## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

#### Appendix A

#### Western Region by Income Before Taxes: Average Annual Expenditures and Characteristics Consumer Expenditure Survey, Table 34, 2008-2009

*These values used to produce the income variance table. The original full table is available in Appendix E.*

Item	West Region Total	Less than \$5,000	\$5,000 to \$9,999	\$10,000 to \$14,999	\$15,000 to \$19,999	\$20,000 to \$29,999	\$30,000 to \$39,999	\$40,000 to \$49,999	\$50,000 to \$69,999	\$70,000 and more
Food at home	\$4,081	\$2,665	\$2,485	\$3,105	\$2,658	\$3,159	\$3,162	\$3,764	\$3,893	\$5,482
Food away from home	\$2,889	\$1,495	\$1,080	\$1,165	\$1,115	\$1,499	\$1,994	\$2,457	\$2,793	\$4,637
Home maintenance, repairs, insurance, other expenses	\$1,136	\$659	\$485	\$519	\$598	\$802	\$667	\$687	\$1,060	\$1,837
Housekeeping supplies	\$637	\$416	\$335	\$519	\$357	\$470	\$462	\$519	\$640	\$885
Furniture	\$358	\$116	\$175	\$178	\$217	\$162	\$176	\$240	\$318	\$618
Floor coverings	\$32	\$7	\$29	\$5	\$21	\$11	\$17	\$27	\$13	\$63
Major appliances	\$219	\$63	\$96	\$92	\$84	\$116	\$131	\$190	\$225	\$354
Miscellaneous household equipment	\$837	\$347	\$294	\$507	\$390	\$370	\$598	\$857	\$646	\$1,363
Apparel and services	\$1,866	\$718	\$609	\$1,777	\$1,120	\$1,137	\$1,233	\$1,411	\$1,744	\$2,818
Vehicle purchases (net outlay)	\$2,558	\$895	\$697	\$751	\$934	\$1,679	\$2,487	\$1,833	\$2,920	\$3,845
Gasoline and motor oil	\$2,347	\$1,162	\$1,100	\$1,059	\$1,246	\$1,612	\$1,932	\$2,324	\$2,560	\$3,277
Auto Maintenance and repairs	\$860	\$381	\$292	\$316	\$459	\$533	\$670	\$769	\$972	\$1,263
Audio and visual equipment and services	\$1,013	\$693	\$413	\$456	\$504	\$609	\$799	\$838	\$1,135	\$1,478
Pets, toys, hobbies, and playground equipment	\$861	\$393	\$207	\$336	\$317	\$495	\$444	\$536	\$631	\$1,580
Other entertainment supplies, equipment, and services	\$584	\$291	\$221	\$138	\$92	\$255	\$399	\$491	\$824	\$888
Personal care products and services	\$687	\$427	\$275	\$326	\$372	\$400	\$462	\$513	\$598	\$1,113
Reading	\$131	\$81	\$42	\$64	\$84	\$83	\$81	\$104	\$121	\$204



## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

#### Appendix B

**Income Variance Based on Consumer Expenditure Survey, 2008-2009 Region of Residence Table (West) <sup>(1)</sup>**

	Less than \$5,000	\$5,000 to \$9,999	\$10,000 to \$14,999	\$15,000 to \$19,999	\$20,000 to \$29,999	\$30,000 to \$39,999	\$40,000 to \$49,999	\$50,000 to \$69,999	\$70,000 +
Category	The values in this table represent what households in a particular income bracket spend in a retail category relative to the average amount spent across all households in that same category. For example, households with incomes of \$70,000+ spend 134% of the average grocery spending across all households (i.e. 34% more).								
Groceries	65%	61%	76%	65%	77%	77%	92%	95%	134%
Restaurants, Bars and Catering	52%	37%	40%	39%	52%	69%	85%	97%	161%
Home maintenance, repairs, other expenses	58%	43%	46%	53%	71%	59%	60%	93%	162%
Housekeeping supplies	65%	53%	81%	56%	74%	73%	81%	100%	139%
Furniture	32%	49%	50%	61%	45%	49%	67%	89%	173%
Floor coverings	22%	91%	16%	66%	34%	53%	84%	41%	197%
Major appliances	29%	44%	42%	38%	53%	60%	87%	103%	162%
Miscellaneous household equipment	41%	35%	61%	47%	44%	71%	102%	77%	163%
Clothing, shoes, jewelry and accessories	38%	33%	95%	60%	61%	66%	76%	93%	151%
Vehicle purchases (net outlay)	35%	27%	29%	37%	66%	97%	72%	114%	150%
Gasoline and motor oil	50%	47%	45%	57%	69%	82%	99%	109%	140%
Vehicle Maintenance and repairs	44%	34%	37%	53%	62%	78%	89%	113%	147%
Gas stations (gas, conv. store purchases, tobacco)	68%	41%	45%	50%	60%	79%	83%	112%	146%
Pets, toys, hobbies, and playground equipment	46%	24%	39%	37%	57%	52%	62%	73%	184%
Other entertainment supplies, equipment	50%	38%	24%	16%	44%	68%	84%	141%	152%
Personal care products and services	62%	40%	47%	54%	58%	67%	75%	87%	162%
Reading materials	62%	32%	49%	64%	63%	62%	79%	92%	156%

	Households in this income bracket spend less in this category than the average across all households.
	Households in this income bracket spend more in this retail category than the average across all households.

Notes:

(1) The titles of Consumer Expenditure Survey categories presented here may be altered and/or combined when compared to the original categories.



## City of Snoqualmie – Urban Growth Area Analysis Retail Leakage Analysis

### Appendix C

#### Typical Per Store Sales and Floor Area Estimates for Retail Categories <sup>(1)</sup>

Category	Category from "Dollars and Cents" Report	Sales per Sq Ft (2004)	Consumer Price Index Adjustment (16)	Adjusted Sales per Sq. Ft.	Median Size (sq ft)	Sales per Store
Groceries (2)	Supermarket	\$408	116.4%	\$475	34,187	\$16,235,817
Housekeeping supplies						
Personal care products and services						
Restaurants, bars, and catering (3)	Restaurant (with liquor)	\$307	116.4%	\$357	3,200	\$1,143,514
Home maintenance, repairs, and other expenses (5)	Hardware	\$143	116.4%	\$166	6,800	\$1,131,874
Furniture (4)	Furniture	\$161	116.4%	\$187	4,000	\$749,616
Floor coverings (9)	Floor Coverings	\$198	116.4%	\$230	4,130	\$951,849
Major appliances (10)	Home Appliances	\$271	116.4%	\$315	3,104	\$979,138
Miscellaneous household equipment						
Clothing, shoes, jewelry and accessories (8)	Clothing & Accessories	\$168	116.4%	\$196	2,200	\$430,214
Vehicle purchases (net outlay) (15)	n/a	n/a	n/a	n/a	n/a	\$28,123,000
Gas stations (gas, conv. store purchases, tobacco) (14)	Service Station	\$1,302	116.4%	\$1,516	2,000	\$3,031,056
Vehicle maintenance and repairs (13)	Auto (tires, batteries, acces	\$219	116.4%	\$255	3,450	\$879,460
Audio and visual equipment and services (7)	Electronics-General	\$276	116.4%	\$321	2,700	\$867,413
Pets, toys, hobbies, and playground equipment (11)	Hobby/Special Interest	\$163	116.4%	\$190	2,034	\$385,915
Other entertainment supplies, equipment, & services (12)	Sporting Goods	\$190	116.4%	\$221	4,318	\$954,969
Reading materials (6)	Bookstore	\$155	116.4%	\$180	10,093	\$1,820,979

#### Notes

(1) Data from *Dollars & Cents of Shopping Centers: 2004*. Urban Land Institute.

(2) Sales from Table 6-9; store size from table 6E.

(3) Sales from Table 6-9; store size from table 6E.

(4) Table 6E

(5) Table 1-20

(6) Table 5E

(7) Table 5E

(8) Table 1-20

(9) Table 5E

(10) Table 1-19

(11) Table 1-20

(12) Sales from Table 5-22; store size from Table 6E.

(13) Sales from Table 5E; store size from Table 1-20.

(14) Table 5E

(15) Washington state average. National Automobile Dealers Association, State of the Industry Report, 2011.

(16) The 2004 sales per sq. ft. values were adjusted to 2010 using the Consumer Price Index (i.e. adjusted for inflation)

## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

#### Appendix D

**Table 24. Selected western metropolitan statistical areas: Average annual expenditures and characteristics, Consumer Expenditure Survey, 2008-2009**

Item	All consumer units in the West	Los Angeles	San Francisco	San Diego	Seattle	Phoenix
Number of consumer units (in thousands) .....	27,011	5,117	2,909	1,086	1,910	1,633
Consumer unit characteristics:						
Income before taxes .....	\$66,678	\$68,749	\$91,330	\$67,554	\$79,874	\$65,128
Age of reference person .....	47.9	48.9	46.9	47.0	47.5	46.1
Average number in consumer unit:						
Persons .....	2.6	2.8	2.5	2.3	2.3	2.7
Children under 18 .....	.7	.7	.6	.5	.5	.8
Persons 65 and older .....	.3	.3	.2	.3	.2	.2
Earners .....	1.4	1.4	1.4	1.2	1.4	1.4
Vehicles .....	2.0	1.8	1.8	1.5	2.6	1.9
Percent homeowner .....	63	53	55	53	63	70
Average annual expenditures .....	\$54,226	\$56,529	\$67,730	\$53,820	\$66,015	\$53,618
Food .....	6,970	7,531	7,952	6,541	8,082	6,402
Food at home .....	4,081	4,260	4,280	3,644	4,596	3,596
Cereals and bakery products .....	522	511	565	453	614	464
Meats, poultry, fish, and eggs .....	882	996	891	726	865	800
Dairy products .....	452	438	476	397	539	362
Fruits and vegetables .....	766	864	920	785	842	608
Other food at home .....	1,460	1,451	1,427	1,283	1,736	1,363
Food away from home .....	2,889	3,271	3,672	2,897	3,486	2,806
Alcoholic beverages .....	524	504	714	647	839	503
Housing .....	19,404	21,811	26,064	22,207	22,029	18,698
Shelter .....	12,549	14,938	19,096	15,146	13,829	11,185
Owned dwellings .....	7,898	8,271	11,227	7,741	8,727	7,695
Rented dwellings .....	3,951	6,086	6,508	6,973	4,069	2,918
Other lodging .....	700	580	1,361	432	1,033	573
Utilities, fuels, and public services .....	3,356	3,257	3,139	2,989	3,554	3,892
Household operations .....	1,146	1,370	1,344	1,571	1,592	1,174
Housekeeping supplies .....	637	643	585	678	741	633
Household furnishings and equipment .....	1,717	1,603	1,899	1,823	2,312	1,813
Apparel and services .....	1,866	2,140	2,413	2,407	2,464	1,793
Transportation .....	8,227	8,784	9,535	7,171	9,380	9,330
Vehicle purchases (net outlay) .....	2,558	2,513	2,748	1,941	3,395	2,887
Gasoline and motor oil .....	2,347	2,667	2,235	2,412	2,454	2,658
Other vehicle expenses .....	2,649	2,989	3,252	2,373	2,589	3,275
Public transportation .....	673	615	1,300	445	943	509
Healthcare .....	3,093	2,620	3,319	2,249	3,684	3,326
Entertainment .....	3,197	2,599	3,247	2,459	4,463	3,814
Personal care products and services .....	687	710	909	685	833	868
Reading .....	131	108	150	83	218	98
Education .....	960	895	1,555	720	1,070	473
Tobacco products and smoking supplies .....	268	202	188	101	342	340
Miscellaneous .....	965	909	958	666	1,490	884
Cash contributions .....	1,954	1,659	2,029	1,484	2,918	1,814
Personal insurance and pensions .....	5,981	6,058	8,697	6,399	8,202	5,274
Life and other personal insurance .....	263	259	255	224	408	179
Pensions and Social Security .....	5,717	5,799	8,443	6,175	7,794	5,095

<sup>1</sup> Data are likely to have large sampling errors.



## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

#### Appendix E

**Table 8. Region of residence: Average annual expenditures and characteristics, Consumer Expenditure Survey, 2009**

Item	All consumer units	Northeast	Midwest	South	West
Number of consumer units (in thousands) .....	120,847	22,411	27,536	43,819	27,080
Consumer unit characteristics:					
Income before taxes .....	\$62,857	\$71,731	\$59,908	\$58,641	\$65,332
Income after taxes .....	60,753	68,986	57,866	56,795	63,279
Age of reference person .....	49.4	51.2	48.9	49.6	48.1
Average number in consumer unit:					
Persons .....	2.5	2.4	2.4	2.5	2.6
Children under 18 .....	.6	.5	.6	.6	.7
Persons 65 and older .....	.3	.3	.3	.3	.3
Earners .....	1.3	1.3	1.3	1.3	1.3
Vehicles .....	2.0	1.7	2.1	1.9	2.0
Percent distribution:					
Sex of reference person:					
Male .....	47	44	48	45	52
Female .....	53	56	52	55	48
Housing tenure:					
Homeowner .....	66	65	68	68	62
With mortgage .....	41	40	42	40	44
Without mortgage .....	25	25	26	28	18
Renter .....	34	35	32	32	38
Race of reference person:					
Black or African-American .....	12	10	9	20	5
White, Asian, and all other races .....	88	90	91	80	95
Hispanic or Latino origin of reference person:					
Hispanic or Latino .....	12	10	5	13	19
Not Hispanic or Latino .....	88	90	95	87	81
Education of reference person:					
Elementary (1-8) .....	5	4	4	6	5
High school (9-12) .....	34	39	33	37	28
College .....	61	57	63	57	67
Never attended and other .....	( 1 )	( 1 )	( 1 )	( 1 )	( 1 )
At least one vehicle owned or leased .....	88	82	90	90	90
Average annual expenditures .....	\$49,067	\$53,868	\$46,551	\$45,749	\$53,005
Food .....	6,372	6,975	6,031	5,944	6,903
Food at home .....	3,753	4,043	3,682	3,481	4,023
Cereals and bakery products .....	506	563	510	469	516
Cereals and cereal products .....	173	188	176	157	182
Bakery products .....	334	376	334	313	334
Meats, poultry, fish, and eggs .....	841	919	762	829	875
Beef .....	226	230	207	230	236
Pork .....	168	165	171	172	163
Other meats .....	114	133	123	101	108
Poultry .....	154	169	121	158	169
Fish and seafood .....	135	176	103	125	150
Eggs .....	44	46	37	43	50
Dairy products .....	406	435	419	367	432
Fresh milk and cream .....	144	152	140	140	148
Other dairy products .....	262	284	279	227	284
Fruits and vegetables .....	656	751	616	581	740
Fresh fruits .....	220	247	210	185	262
Fresh vegetables .....	209	247	186	180	249
Processed fruits .....	118	139	114	105	126
Processed vegetables .....	110	119	107	111	103

See footnotes at end of table.

## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

#### Appendix E (cont.)

**Table 8. Region of residence: Average annual expenditures and characteristics, Consumer Expenditure Survey, 2009 – Continued**

Item	All consumer units	Northeast	Midwest	South	West
Other food at home .....	\$1,343	\$1,374	\$1,375	\$1,235	\$1,461
Sugar and other sweets .....	141	140	157	124	152
Fats and oils .....	102	109	105	98	101
Miscellaneous foods .....	715	731	742	649	782
Nonalcoholic beverages .....	337	334	323	329	365
Food prepared by consumer unit on out-of-town trips .....	49	60	47	36	60
Food away from home .....	2,619	2,932	2,349	2,463	2,880
Alcoholic beverages .....	435	468	418	368	530
Housing .....	16,895	19,343	15,109	15,387	19,127
Shelter .....	10,075	11,944	8,756	8,524	12,378
Owned dwellings .....	6,543	7,513	6,126	5,613	7,667
Mortgage interest and charges .....	3,594	3,434	2,970	3,147	5,084
Property taxes .....	1,811	2,865	1,962	1,309	1,599
Maintenance, repairs, insurance, other expenses .....	1,138	1,214	1,195	1,158	984
Rented dwellings .....	2,860	3,507	1,986	2,361	4,021
Other lodging .....	672	924	643	550	690
Utilities, fuels, and public services .....	3,645	4,095	3,421	3,741	3,343
Natural gas .....	483	719	695	266	424
Electricity .....	1,377	1,306	1,119	1,719	1,143
Fuel oil and other fuels .....	141	434	114	62	57
Telephone services .....	1,162	1,241	1,080	1,191	1,133
Water and other public services .....	481	396	414	503	586
Household operations .....	1,011	1,196	780	969	1,164
Personal services .....	389	551	258	339	472
Other household expenses .....	622	645	522	630	692
Housekeeping supplies .....	659	640	682	667	638
Laundry and cleaning supplies .....	156	142	163	159	155
Other household products .....	360	358	366	385	314
Postage and stationery .....	143	139	153	123	169
Household furnishings and equipment .....	1,506	1,467	1,471	1,485	1,605
Household textiles .....	124	126	116	122	134
Furniture .....	343	347	316	353	349
Floor coverings .....	30	30	39	30	22
Major appliances .....	194	175	189	202	201
Small appliances, miscellaneous housewares ....	93	90	100	80	112
Miscellaneous household equipment .....	721	700	711	697	786
Apparel and services .....	1,725	1,782	1,461	1,786	1,844
Men and boys .....	383	412	339	371	422
Men, 16 and over .....	304	331	264	294	340
Boys, 2 to 15 .....	79	81	75	78	82
Women and girls .....	678	662	590	727	702
Women, 16 and over .....	561	564	476	599	581
Girls, 2 to 15 .....	118	98	113	129	120
Children under 2 .....	91	76	86	86	117
Footwear .....	323	343	251	349	336
Other apparel products and services .....	249	288	195	252	268
Transportation .....	7,658	8,108	7,649	7,400	7,711
Vehicle purchases (net outlay) .....	2,657	2,754	2,921	2,612	2,380
Cars and trucks, new .....	1,297	1,644	1,387	1,321	881
Cars and trucks, used .....	1,304	1,089	1,468	1,211	1,468
Other vehicles .....	55	22	66	81	32
Gasoline and motor oil .....	1,986	1,787	1,933	2,103	2,018

See footnotes at end of table.

## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

#### Appendix E (cont.)

**Table 8. Region of residence: Average annual expenditures and characteristics, Consumer Expenditure Survey, 2009 – Continued**

Item	All consumer units	Northeast	Midwest	South	West
Other vehicle expenses .....	\$2,536	\$2,885	\$2,375	\$2,371	\$2,673
Vehicle finance charges .....	281	218	252	336	274
Maintenance and repairs .....	733	762	706	646	876
Vehicle insurance .....	1,075	1,271	957	1,095	999
Vehicle rental, leases, licenses, and other charges .....	447	634	460	294	524
Public transportation .....	479	682	420	314	640
Healthcare .....	3,126	3,132	3,272	3,030	3,128
Health insurance .....	1,785	1,916	1,845	1,730	1,703
Medical services .....	736	625	780	672	889
Drugs .....	486	481	508	521	414
Medical supplies .....	119	111	139	108	122
Entertainment .....	2,693	2,767	2,627	2,467	3,062
Fees and admissions .....	628	780	573	508	751
Audio and visual equipment and services .....	975	1,003	927	993	970
Pets, toys, hobbies, and playground equipment .....	690	682	649	651	800
Other entertainment supplies, equipment, and services .....	400	302	478	315	540
Personal care products and services .....	596	601	538	593	653
Reading .....	110	141	112	85	121
Education .....	1,068	1,710	1,103	820	902
Tobacco products and smoking supplies .....	380	439	409	394	278
Miscellaneous .....	816	821	798	768	910
Cash contributions .....	1,723	1,568	1,684	1,692	1,941
Personal insurance and pensions .....	5,471	6,013	5,340	5,015	5,894
Life and other personal insurance .....	309	350	340	298	262
Pensions and Social Security .....	5,162	5,662	5,000	4,717	5,633
Sources of income and personal taxes:					
Money income before taxes .....	62,857	71,731	59,908	58,641	65,332
Wages and salaries .....	50,339	57,689	47,283	46,712	53,234
Self-employment income .....	2,673	2,970	3,090	2,149	2,853
Social Security, private and government retirement .....	6,837	7,499	6,733	6,983	6,157
Interest, dividends, rental income, other property income .....	1,460	1,688	1,472	1,455	1,265
Unemployment and workers' compensation, veterans' benefits .....	432	629	451	281	493
Public assistance, supplemental security income, food stamps .....	435	429	347	442	517
Regular contributions for support .....	416	363	353	400	549
Other income .....	266	463	179	220	264
Personal taxes .....	2,104	2,745	2,042	1,846	2,053
Federal income taxes .....	1,404	1,728	1,311	1,331	1,351
2008 Tax stimulus (new UCC Q20082) (thru Q20091) .....	2-1	2-3	2-1	2-1	( <sup>1</sup> )
State and local income taxes .....	524	766	567	351	560
Other taxes .....	177	254	165	165	142

See footnotes at end of table.

## City of Snoqualmie – Urban Growth Area Analysis

### Retail Leakage Analysis

#### Appendix E (cont.)

**Table 8. Region of residence: Average annual expenditures and characteristics, Consumer Expenditure Survey, 2009 – Continued**

Item	All consumer units	Northeast	Midwest	South	West
Income after taxes .....	60,753	68,986	57,866	56,795	63,279
Addenda:					
Net change in total assets and liabilities .....	-\$5,416	\$512	-\$5,401	-\$3,418	-\$13,568
Net change in total assets .....	6,448	7,882	4,750	5,558	8,428
Net change in total liabilities .....	11,864	7,370	10,151	8,976	21,995
Other financial information:					
Other money receipts .....	514	498	527	369	747
Mortgage principal paid on owned property .....	-2,211	-2,499	-2,057	-1,838	-2,734
Estimated market value of owned home .....	157,630	191,746	126,698	130,084	205,421
Estimated monthly rental value of owned home ....	856	995	757	782	961
Gifts of goods and services .....	1,067	1,292	1,044	907	1,163
Food .....	96	110	114	74	103
Alcoholic beverages .....	9	11	11	4	13
Housing .....	202	252	199	172	214
Housekeeping supplies .....	31	28	33	24	43
Household textiles .....	9	7	11	9	9
Appliances and miscellaneous housewares .....	15	16	19	12	17
Major appliances .....	4	4	5	3	6
Small appliances and miscellaneous housewares .....	11	12	13	9	11
Miscellaneous household equipment .....	41	60	42	35	37
Other housing .....	106	141	94	92	110
Apparel and services .....	237	217	216	255	245
Males, 2 and over .....	53	61	47	51	55
Females, 2 and over .....	86	60	68	109	91
Children under 2 .....	48	47	50	43	55
Other apparel products and services .....	49	49	51	52	43
Jewelry and watches .....	14	21	16	11	11
All other apparel products and services .....	35	28	35	41	32
Transportation .....	86	39	61	63	187
Healthcare .....	28	11	28	24	49
Entertainment .....	91	107	92	85	88
Toys, games, arts and crafts, and tricycles .....	34	39	36	33	29
Other entertainment .....	57	68	56	52	60
Personal care products and services .....	12	14	13	13	9
Reading .....	1	1	1	1	( <sup>1</sup> )
Education .....	229	439	212	174	160
All other gifts .....	76	91	98	43	95

<sup>1</sup> Value is less than or equal to 0.5.

<sup>2</sup> Data are likely to have large sampling errors.

Source: Consumer Expenditure Survey, U.S. Bureau of Labor Statistics, October, 2010



## City of Snoqualmie – Urban Growth Area Analysis Retail Leakage Analysis

### Appendix F

#### Explanation of Selected Consumer Expenditure Survey Categories

**Audio and visual equipment** and services includes tvs, discs, disc players, video game hardware, video game cartridges, cable TV, radios, CDs, and tapes (including records, compact discs, and tapes purchased through mail order clubs), musical instruments, and rental and repair of TV and sound equipment.

**Housekeeping supplies** includes laundry and cleaning supplies, cleaning and toilet tissues, stationery supplies, postage, delivery services, miscellaneous household products, and lawn and garden supplies.

**Major appliances** include refrigerators and freezers, dishwashers, garbage disposals, stoves, vacuum cleaners, microwaves, air-conditioners, sewing machines, washing machines and dryers.

**Miscellaneous household equipment** includes typewriters, luggage, lamps and light fixtures, window coverings, clocks, lawnmowers and gardening equipment, other hand and power tools, telephone answering devices, telephones and accessories, computers and computer hardware for home use, computer software and accessories for home use, calculators, business equipment for home use, floral arrangements and house plants, rental of furniture, closet and storage items, other household decorative items, infants' equipment, outdoor equipment, smoke alarms, other household appliances, and other small miscellaneous furnishings.

**Other entertainment equipment and services** includes indoor exercise equipment, athletic shoes, bicycles, trailers, purchase and rental of RVs, camping equipment, hunting and fishing equipment, sports equipment, boats, boat motors and boat trailers, rental of boats, rental and repair of sports equipment, photographic equipment and supplies (film and film processing), and fireworks.

**Personal care products and services** includes products for the hair, oral hygiene products, shaving needs, cosmetics and bath products, electric personal care appliances, other personal care products, and personal care services for males and females.

**Pets, toys, hobbies, and playground equipment** includes pets, pet food, pet services, veterinary expenses, etc.; toys, games, hobbies, and tricycles; and playground equipment.

**Reading** includes subscriptions for newspapers and magazines; books through book clubs; and the purchase of single-copy newspapers, magazines, newsletters, books, and encyclopedias and other reference books.

**Vehicle purchases (net outlay)** includes the net outlay (purchase price minus trade-in value) on new and used domestic and imported cars and trucks and other vehicles, including motorcycles and private planes.



## City of Snoqualmie – Urban Growth Area Analysis Project Framework Overview and Retail Leakage Study

### Data Sources, References, and Maps:

#### *Interviewees*

<b>Title</b>	<b>Organization</b>	<b>Expertise</b>
Senior Planner	Puget Sound Regional Council	Regional planning and growth management
Senior Director	Cushman & Wakefield	Eastside commercial brokerage
Local Business Owner and Commercial Real Estate Developer	Microconnex Corp. / Metron Systems	Business operations & ownership; property development and management
Financial Analyst	Yarrow Bay Holdings	East King County real estate financial analysis
Economic Analyst	Heartland LLC	Economic analysis / real estate analysis (focused on Puget Sound region)
Senior Staff	enterpriseSeattle	Life science, IT/Gaming, Medical device manufacturing, venture capital, economic development
Mayor and multiple City staff	City of Snoqualmie	City of Snoqualmie planning, economic development, local political perspective
Senior Manager	Dirtfish Rally School	General operations management of the Dirtfish Rally School located at the Snoqualmie Mill Site
Architect and Planner	VIA Architecture	Eastside mixed-use development
Commercial Real Estate Broker	CB Richard Ellis	Eastside brokerage services; Snoqualmie Ridge resident

#### *Documents Reviewed:*

#### Official Documents and Studies:

- A Regional Economic Strategy for the Central Puget Sound Region – Prosperity Partnership / PSRC (2005)
- Central Issaquah Sub-Area Market Assessment – Heartland LLC (2008)
- City of Snoqualmie Comprehensive Plan (2009 Update)
- City of Snoqualmie Buildable Lands Report (2002)
- City of Snoqualmie Downtown Master Plan (2010)
- City of Snoqualmie Economic Development, Branding & Marketing Plan (2006)
- City of Snoqualmie Mill Planning Area FAQ No. 1 (2011)
- City of Snoqualmie Rating Letter and General Obligation Report – Standard & Poor's (2011)



## **City of Snoqualmie – Urban Growth Area Analysis**

### **Project Framework Overview and Retail Leakage Study**

- King County Countywide Planning Policies (2011)
- King County Buildable Lands Reports (2002 and 2007)
- Snoqualmie Urban Growth Area Subarea Plan – City of Snoqualmie and King County (2001)
- Retail Market Analysis for Snoqualmie – Economics Research Associates (2006)
- Letter to Paul Reitenbach from Pat Anderson, City of Snoqualmie Attorney RE: King County CPPs (10/13/2010)
- Retail and Non-Retail Service Mix, Snoqualmie Ridge – Hebert Research (2007)
- Snoqualmie Ridge Retail Development Plan – E.D. Hovee & Co. (2002)
- Snoqualmie Ridge Parcels S-11 & S-21 Market Review – GVA Kidder Mathews (2006)
- Snoqualmie Valley School District Capital Facilities Plan 2010
- Vision 2040 – Puget Sound Regional Council (2010)
- Various internal memorandums, council resolutions, draft development standards, and other such documents were provided by City of Snoqualmie staff and reviewed by the project team

#### Press:

Multiple articles from local and regional media were reviewed that helped to inform the content of this report and referenced herein.





## **City of Snoqualmie – Urban Growth Area Analysis**

### **Project Framework Overview and Retail Leakage Study**

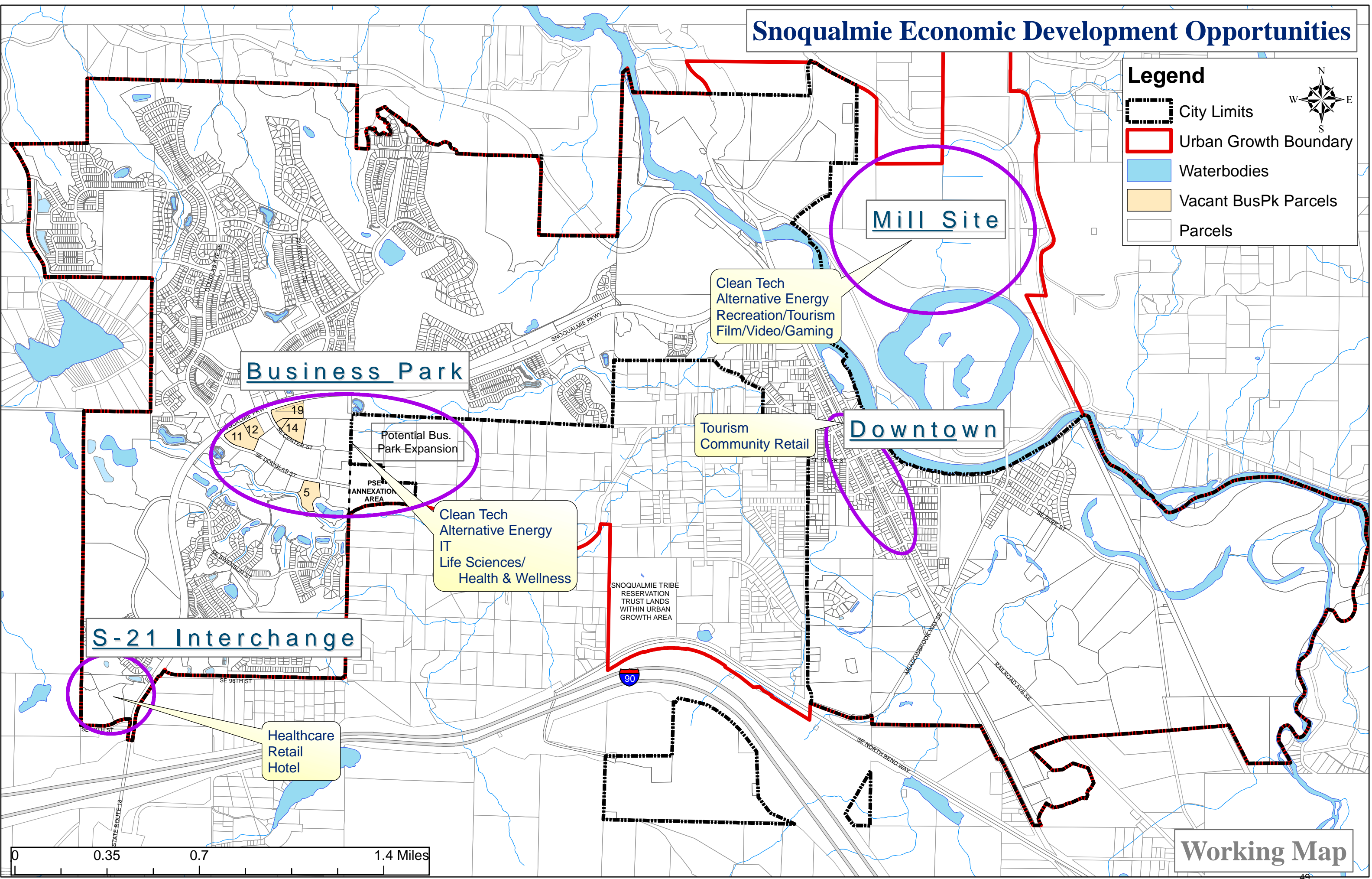
#### **Reference Maps (following this page):**

- Snoqualmie Economic Development Opportunities
- Snoqualmie Official Zoning (2009 Interim Zoning Map)
- Puget Sound Region Urban Centers and Growth Areas
- Mountains to Sound Greenway

# Snoqualmie Economic Development Opportunities

### Legend

- City Limits
- Urban Growth Boundary
- Waterbodies
- Vacant BusPk Parcels
- Parcels



Working Map







## Regional Growth & Manufacturing/Industrial Centers

