



Market Study Roslyn, WA

March 2020

Prepared by:

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1. Introduction

The purpose of this market study is to better understand demographic and retail trends, as well as community behaviors and perceptions, in order to identify opportunities for future growth and development. The study is designed to pair local input with market data to shape strategies for future development.

The report contains the following sections:

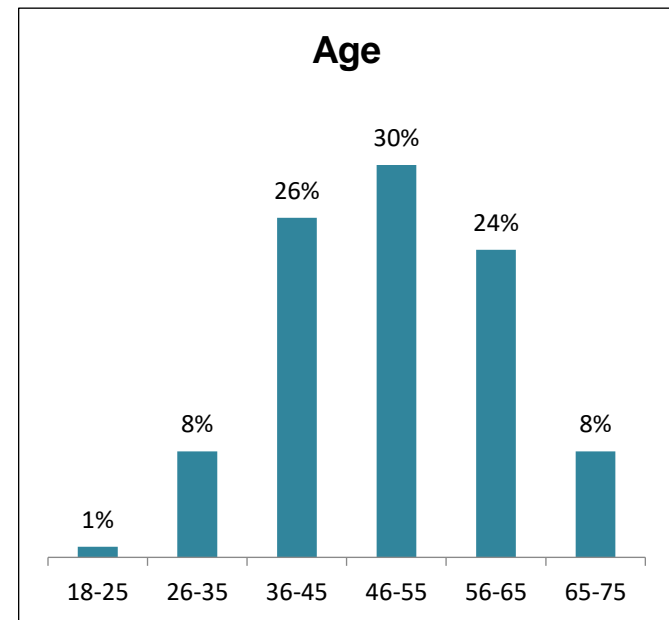
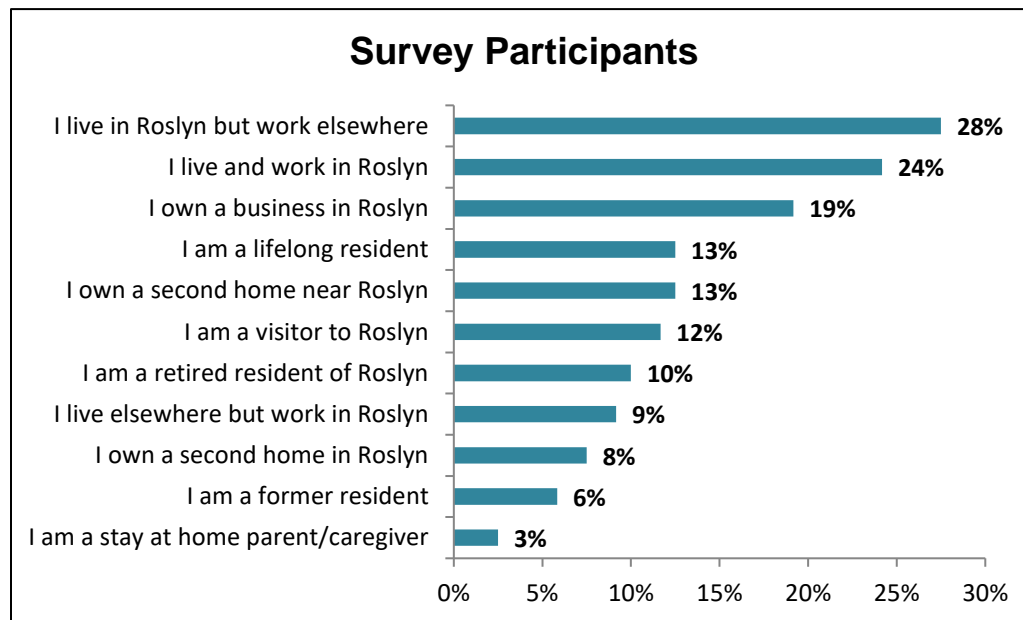
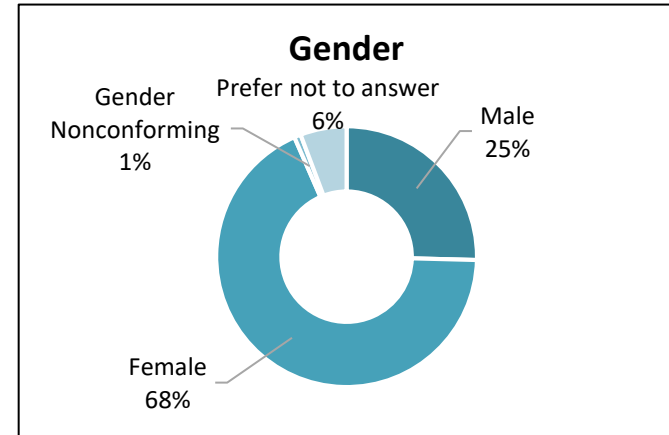
- **Online Survey:** A summary of the Roslyn Community Survey which gathered input from Roslyn residents, business owners and stakeholders.
- **Market Definition:** Definitions of trade area geographies used in the demographic and retail analyses.
- **Demographic Analysis:** Demographic trends in Roslyn and its trade areas.
- **Retail Leakage Analysis:** Retail supply and demand analysis of Roslyn's trade areas that demonstrates retail market potential.

2. Online Survey

In September of 2019, an online survey gathered input from 125 Roslyn residents, business owners, and stakeholders on a variety of issues including tourism, economic development, community vitality, town character, and desires for the future. The results of the survey are summarized below.

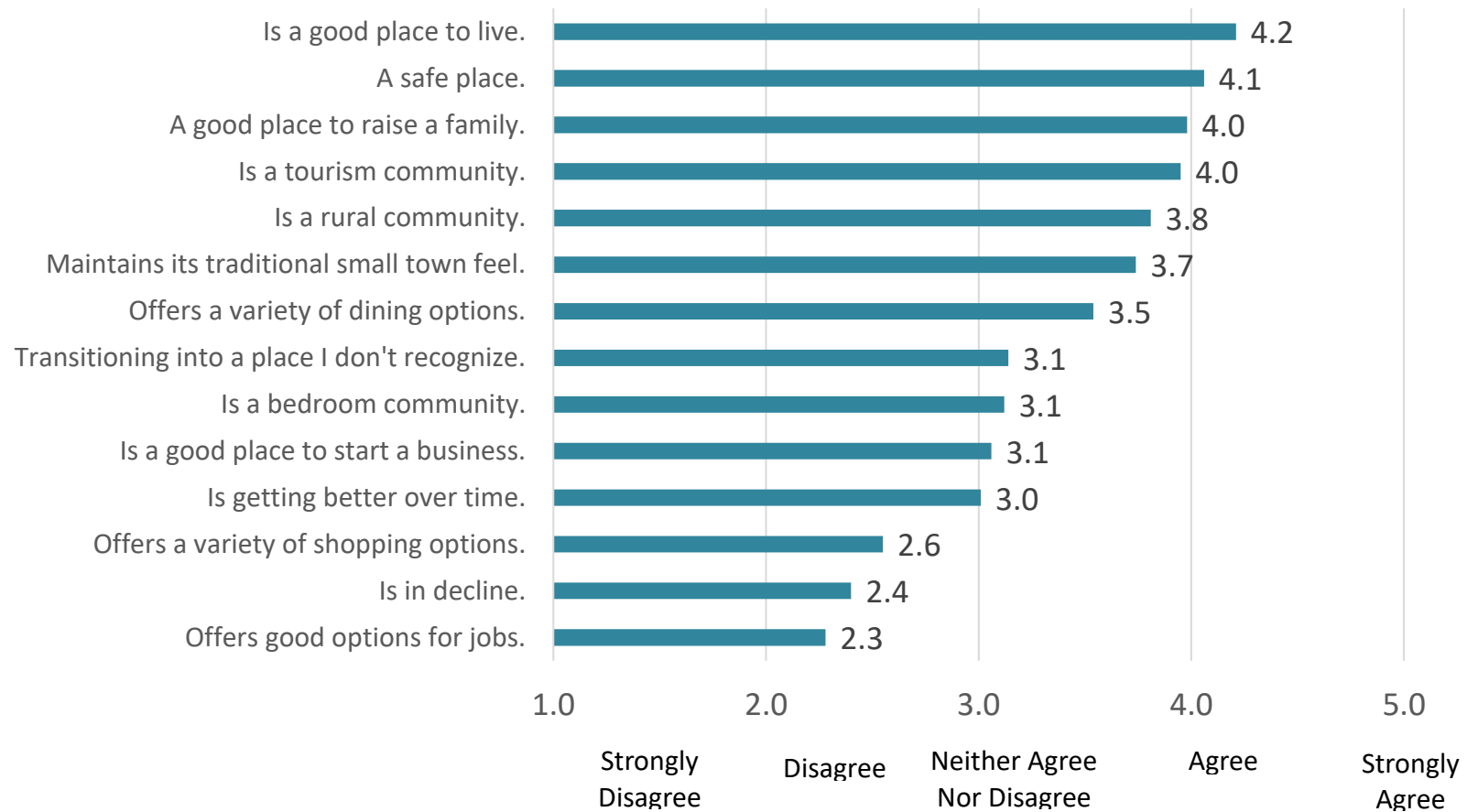
Survey Respondents

Survey respondents represented an array of Roslyn stakeholders including residents, business owners, employees, visitors, and shoppers. A majority of respondents were female. The respondents represented a variety of age groups.

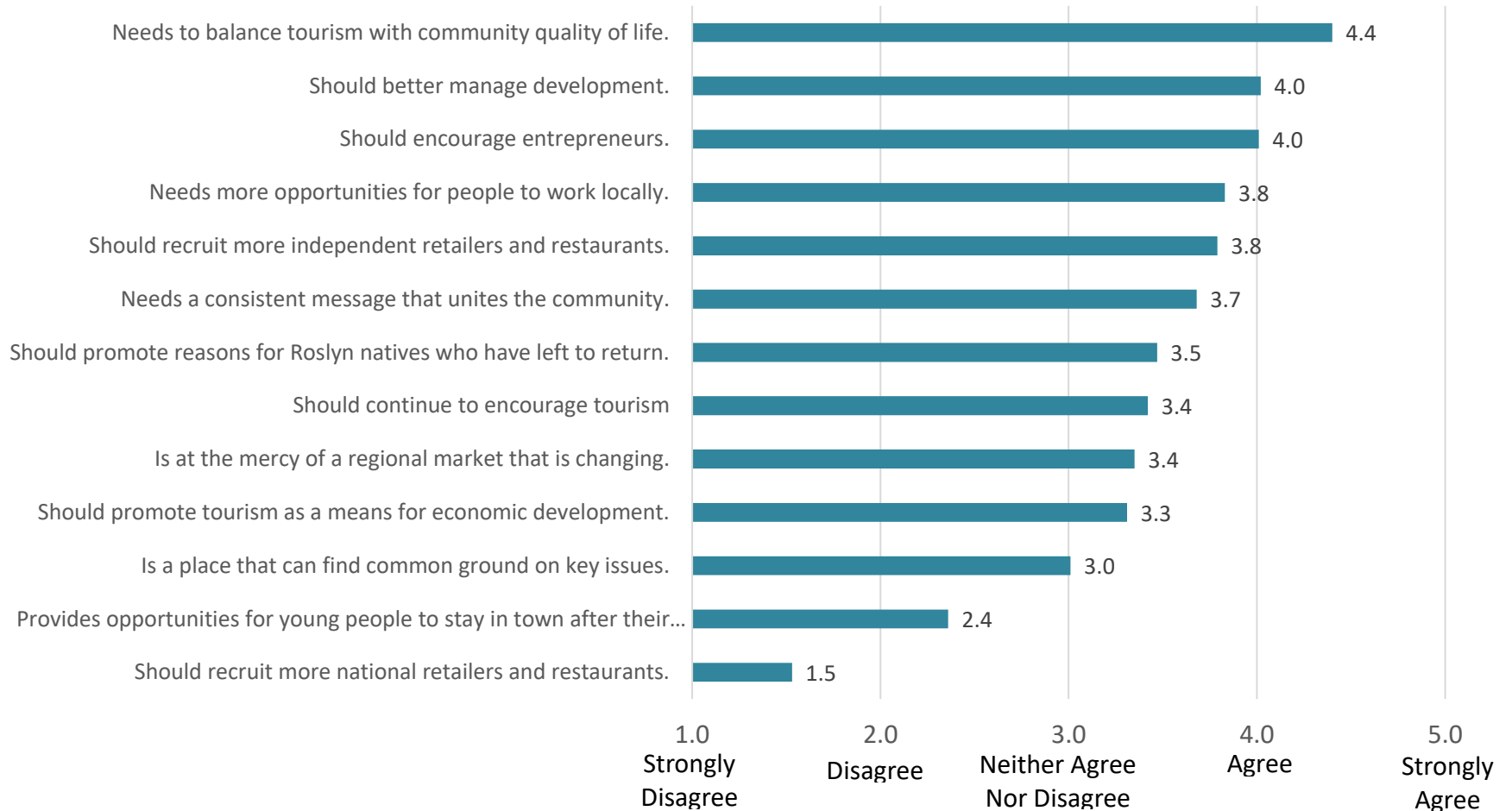


Feelings about Roslyn

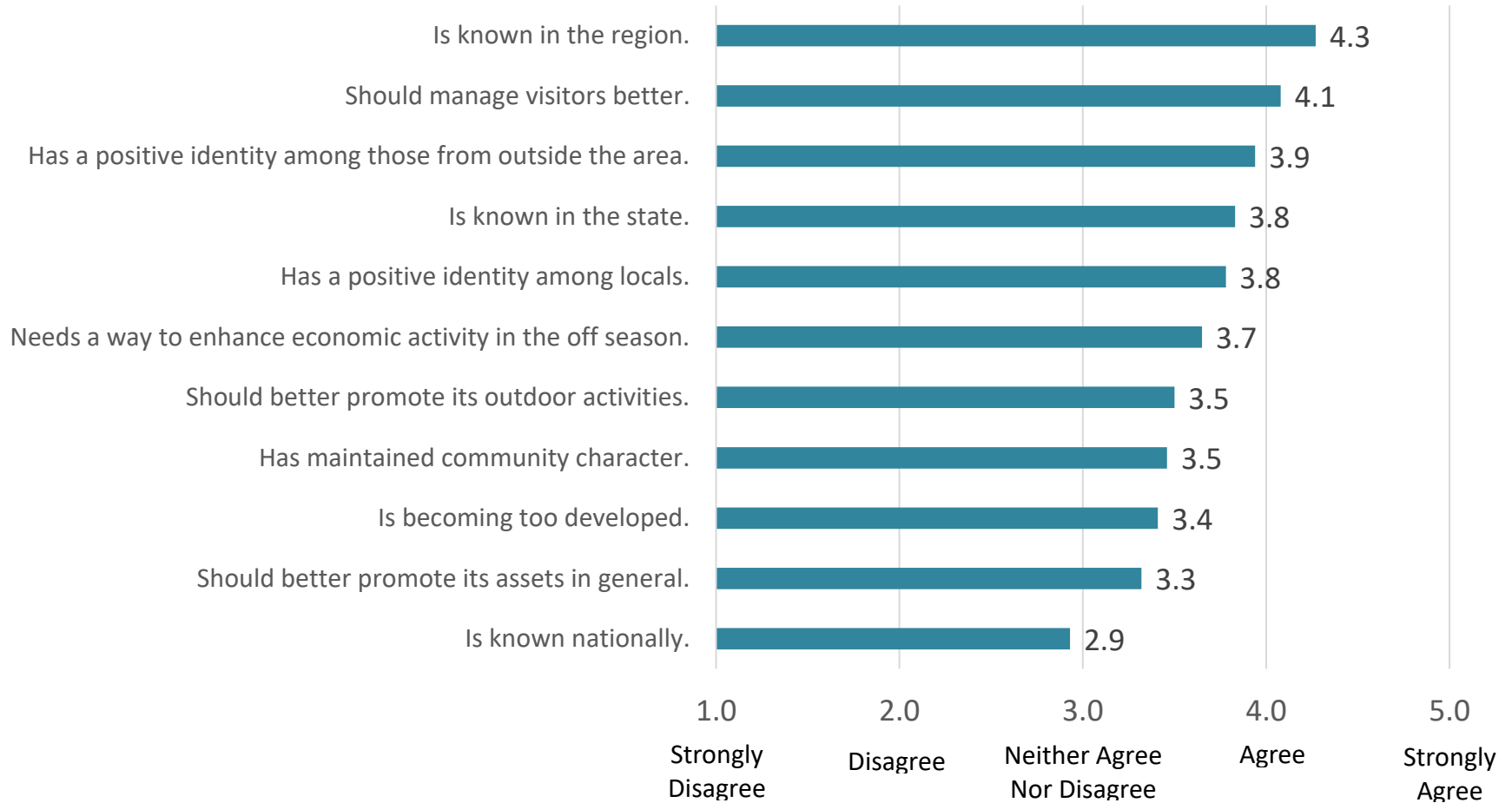
Survey respondents agreed that Roslyn is safe and is a good place to live and to raise a family. There was also agreement that Roslyn is a tourism community. The survey results suggest that there are mixed opinions on whether or not Roslyn is a good place for businesses and offers good employment options.



Survey respondents expressed a strong desire to balance tourism with community quality of life. Better management of development and encouragement of entrepreneurship also ranked high. Respondents recognized a lack of opportunity for young people and clearly favor independent retailers and restaurants over national chains.



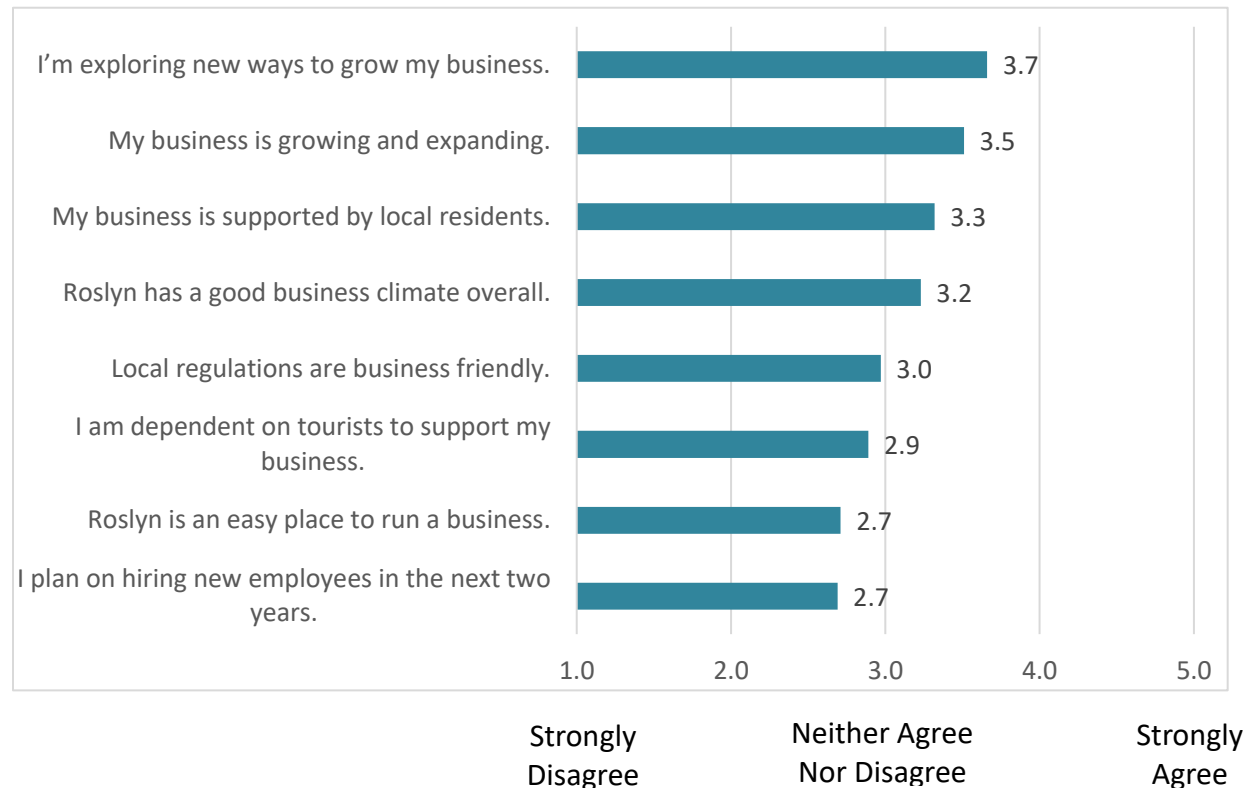
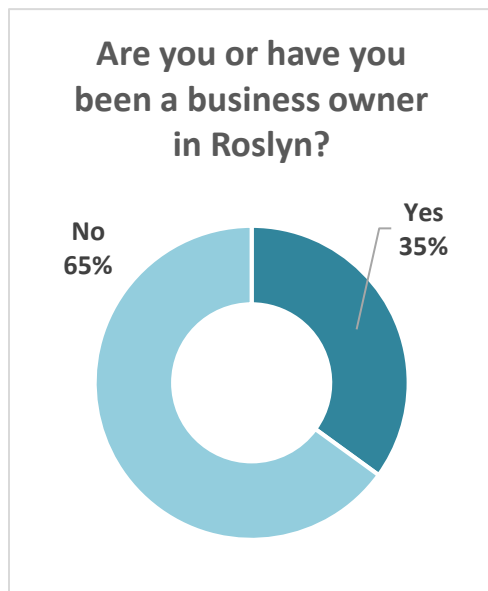
Survey respondents felt that Roslyn is well known in the region, but less known in the state and not known nationally. Better management of visitors ranked high. Comments indicate that respondents desire management of growth and development, preservation of character and history, fostering a more welcoming community, and a stronger balance between tourism and the local community.



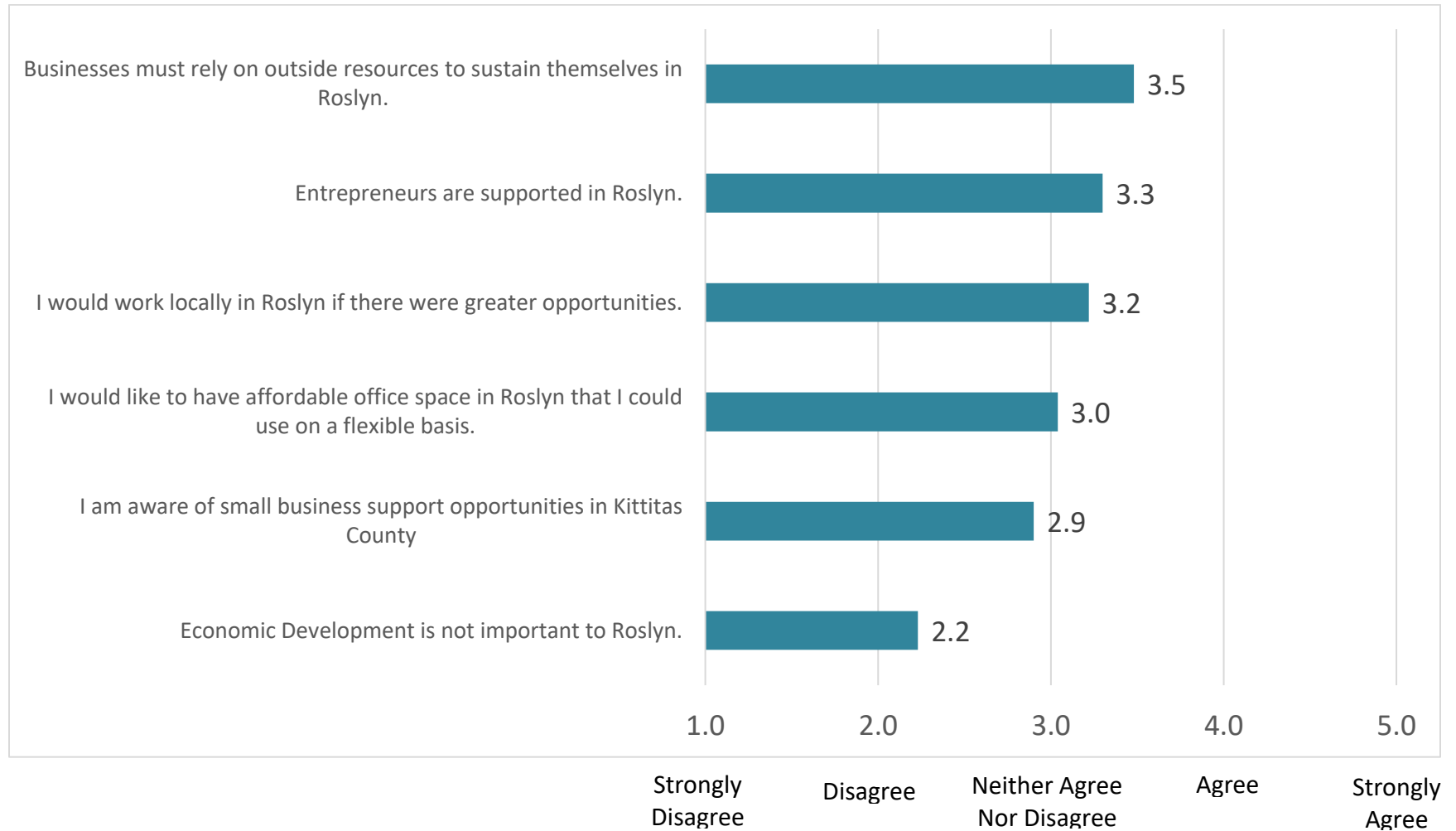
Business Ownership

Approximately 35% of survey respondents either currently own or have previously owned a business in Roslyn. Responses suggest that business owners do not feel like Roslyn is an easy place to run a business. When asked what comments or suggestions they had to enhance the business climate in Roslyn, key themes included:

- Housing for staff
- Promote off-season tourism
- Cohesive marketing strategy
- Improved regulation process
- Parking and signage
- Fill vacant buildings
- Preserve character of downtown
- Public restrooms
- Collaboration



Business owners were also asked to indicate their agreement with statements regarding small business and entrepreneurship. The results indicate that there could be greater awareness of opportunities for small business support.



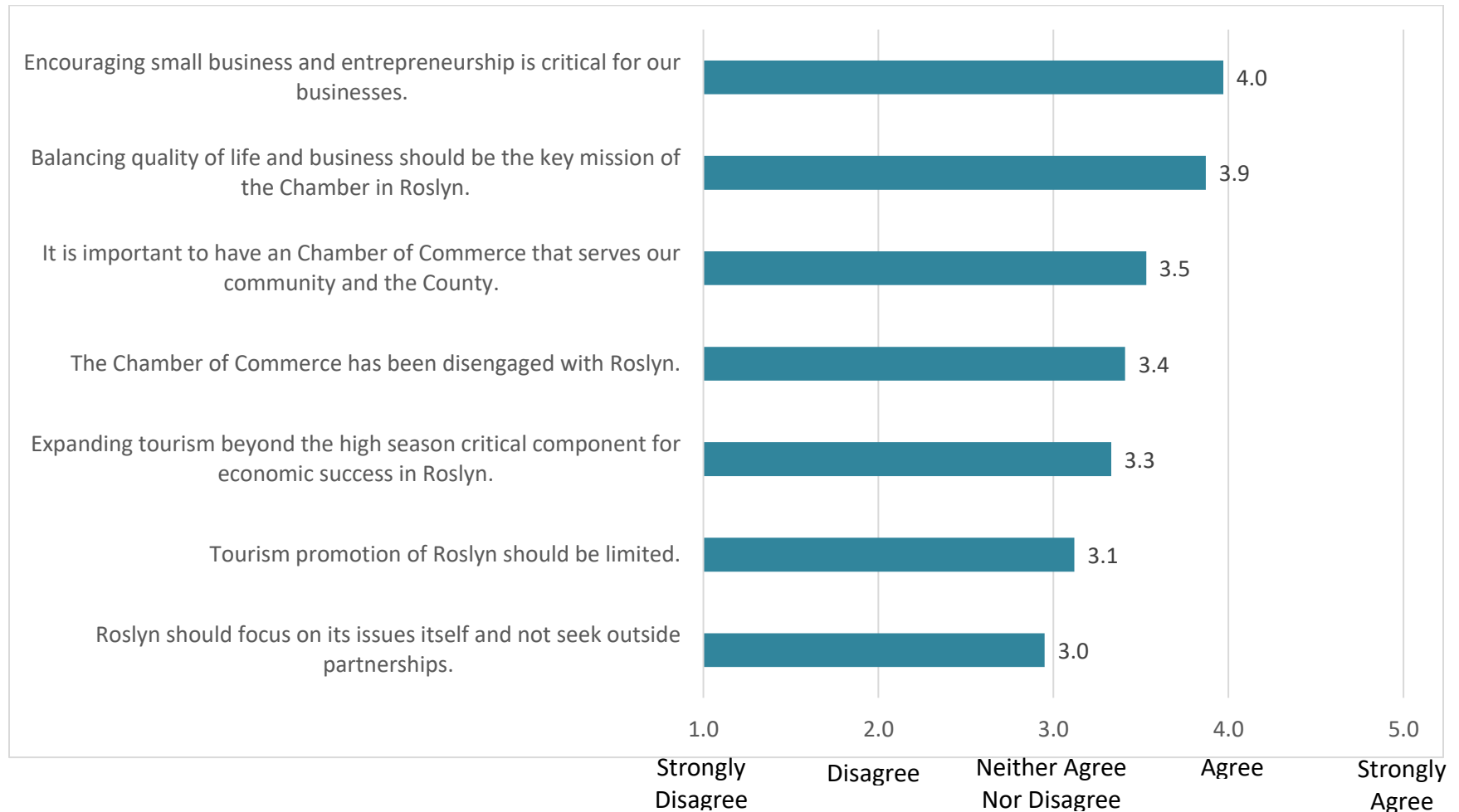
Strengths, Challenges, and Needs

Survey respondents were asked to identify the positive aspects of Roslyn as well as any negative perceptions or challenges. The boxes below show the top responses. The positive aspects center around the quaint, small town, community feel of Roslyn as well as its history and access to nature. Challenges include balancing tourism and growth, and issues associated with those tensions such as parking and affordability. Top wants or needs for Roslyn include infrastructure and service improvements, preservation of character and more options in terms of activities and businesses.

Positive Aspects	Negative Perceptions and Challenges	Roslyn's Best Assets	Top Wants or Needs
<p>Top Responses</p> <ul style="list-style-type: none"> • Beautiful • Charm/Charming • Community • Friendly • Fun • Historic • Nature • Quaint • Quiet • Safe • Small Town • Unique 	<p>Top Responses</p> <ul style="list-style-type: none"> • Parking • Housing (lack of) • Traffic • Tourists • Gentrification • Expensive • Growth / overdeveloped • Division (between locals/tourists, west side, etc) • Not like it used to be 	<p>Top Responses</p> <ul style="list-style-type: none"> • History/historical character • Location • Natural beauty • Outdoor activities • Sense of community • Small town feel 	<p>Top Responses</p> <ul style="list-style-type: none"> • Affordable housing • Parking • Activities • Local business • Preserve character • Infrastructure improvements • Law enforcement • More options <p>Types of Businesses Mentioned:</p> <ul style="list-style-type: none"> • Bakery • Grocery / specialty food

Kittitas County Chamber of Commerce Services

A question was asked about how the Kittitas County Chamber of Commerce could strengthen its services in Roslyn. Respondents indicated a desire for additional support of small business and entrepreneurship.



Online Survey Summary of Findings

The community survey provided public input that is critical to understanding the needs and desires of Roslyn residents, business owners, and stakeholders. Overall, the survey revealed a need to balance competing demands such as:

- Past and future
- Local and tourism
- Growth and preservation
- Development and nature

The findings of the community survey, paired with the following demographic and retail leakage analyses, can help shape future market strategies in Roslyn.

3. Market Definition

The following demographics analysis and retail leakage analysis are performed for the Roslyn city limits as well as a 5-minute and 10-minute drive time area. The drivetime areas allow for analysis of a larger catchment area that is served by businesses in downtown Roslyn.

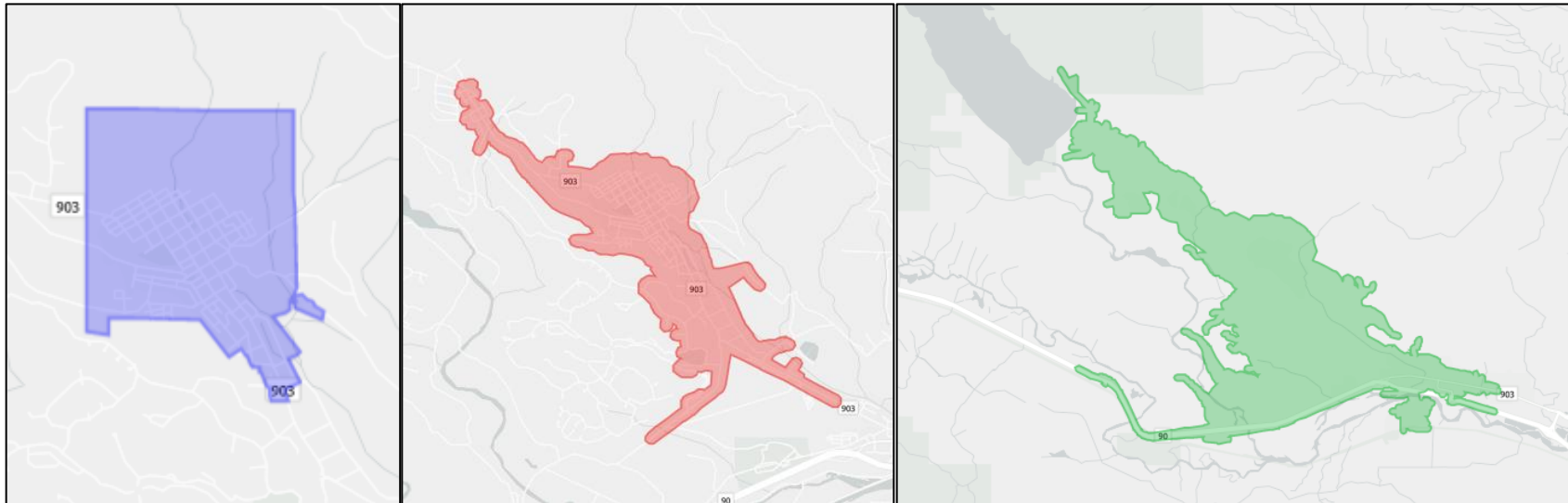


Figure 1: Boundaries of Trade Areas from Left to Right – Roslyn City Limits (shown in Blue), 5-Minute Drivetime (shown in red), 10-Minute Drivetime (shown in green)

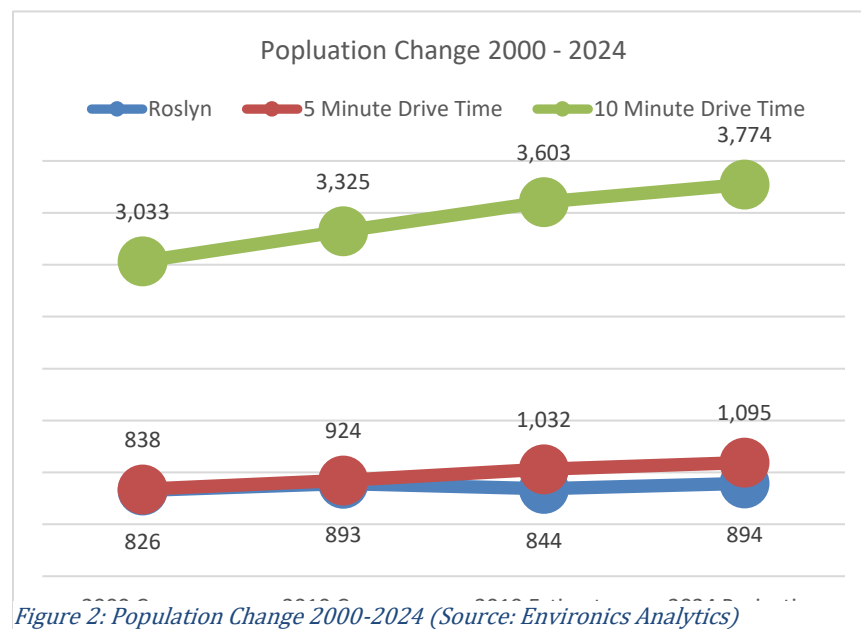
4. Demographics

A demographic profile for Roslyn and its drive time trade areas examines various indicators such as population growth, income, age, and educational attainment. These demographics form a foundation for the retail market assessment. Sources of data below come from the US Census, the American Community Survey (ACS), and Environics Analytics (formerly Nielsen/Claritas).

Population

Population within Roslyn experienced slight decline between 2010 and 2019, hovering between 850 and 900 people. However, population in the surrounding region has experienced growth. Just over 1,000 people live within a 5-minute drive time of Roslyn and approximately 3,600 people live within a 10-minute drive. Roslyn and the drive times are projected to experience moderate population growth over the next 5 years, as detailed in the table and chart below.

	Roslyn	5-Min Drive Time	10-Min Drive Time
Population			
2000 Census	826	838	3,033
2010 Census	893	924	3,325
2019 Estimate	844	1,032	3,603
2024 Projection	894	1,095	3,774
Population Growth			
Percent Change: 2000 to 2010	8.11%	10.26%	9.63%
Percent Change: 2010 to 2019	-5.49%	11.69%	8.36%
Percent Change: 2019 to 2024	5.92%	6.11%	4.75%



Households

There are 399 households in Roslyn, 57% of which are family households. The average household size in Roslyn is 2.12. Projected population growth in Roslyn and the surrounding area translates into additional households. Roslyn is projected to gain 26 additional households over the next five years while the 5- and 10-minute drive time areas are projected to gain 32 and 80 households respectively.

Age

The median age in Roslyn is 49.03, compared to 46.39 in the 10-minute drive time area. Baby Boomers (age 55-74) are the largest generation in Roslyn, representing 33% of the city's population.

Educational Attainment

Approximately 29% of Roslyn's residents age 25 or older have a Bachelor's degree or higher and 93% have at least a high school diploma.

Income and Unemployment

The median household income in Roslyn is \$61,524, which is higher than the median household income in the 10-minute drive time area (\$54,285). Roslyn's unemployment rate is 3.7%.

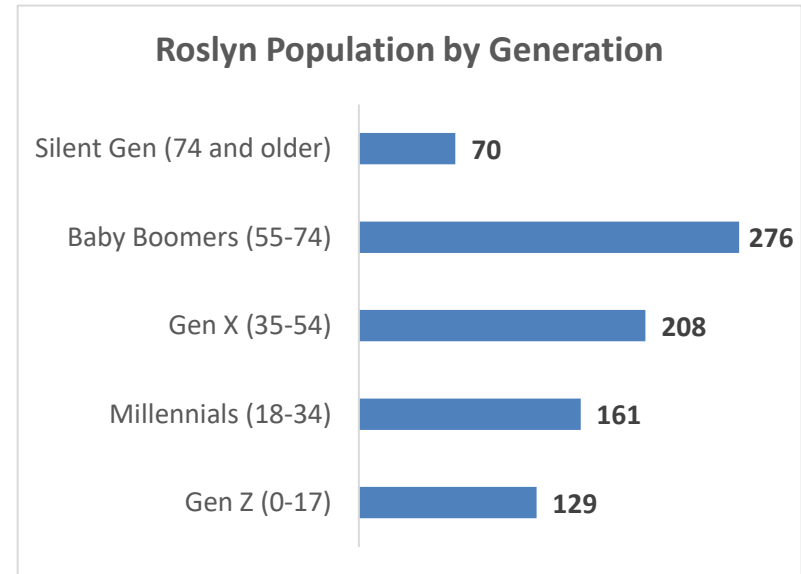


Figure 3: 2019 Roslyn Population by Generation (Source: EnviroNics Analytics)

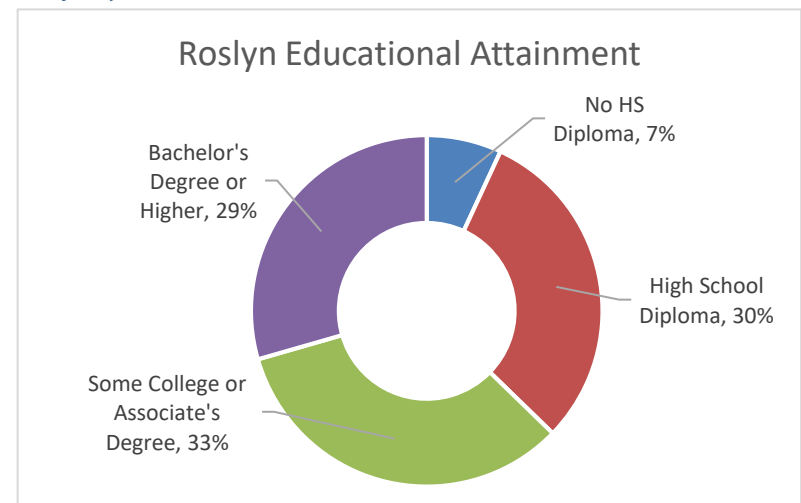


Figure 4: Educational Attainment of Roslyn Population 25 Years or Older, 2019 (Source: EnviroNics Analytics)

5. Retail Leakage Analysis

Introduction

The retail leakage analysis identifies potential opportunities for retail growth based on demand within the local market. "Retail Leakage" is a supply and demand study that refers to the difference between the retail expenditures of residents living in a particular geography and the sales produced by stores located in the same geography. If residents are purchasing more than stores are selling, dollars are leaking outside the trade areas to other locations. Leakage translates directly to demand.

The data presented in this section comes from Environics Analytics, a national retail marketing service used by town planners, retail & restaurant site planners, and national chains for their market research. Environics Analytics gets its data from a number of sources including: Census of Retail Trade; Annual Survey of Retail Trade; Census of Employment and Wages, Sales Tax Reports, and various trade associations. This data is a broad look at the market and should not supplement for more detailed market research. It does, however, provide an overall view of what the market potential can be.

Trade Area Retail Leakage

	Roslyn	5-Minute Drive Time	10-Minute Drive Time
Stores Sell	\$27.97 million	\$32 million	\$136.96 million
Consumers Spend	\$21.17 million	\$25.7 million	\$74.99 million

Stores in Roslyn had \$27.97 million in retail sales over the past year and consumers in the area spent \$21.17 million, resulting in market gain of \$6.8 million.

Market Area Leaks / (Gains)	\$6.8 million	\$6.3 million	\$61.98 million
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Stores in the 5-minute drive time area had \$32 million in retail sales over the past year and consumers in the area spent \$25.7 million, resulting in market gain of \$6.3 million.

Stores in the 10-minute drive time area had \$136.96 million in retail sales over the past year and consumers in the area spent \$74.99 million, resulting in market gain of \$61.98 million.

Key Opportunities

The retail leakage analysis indicates that Roslyn and the 5- and 10-minute drive time areas all experience retail gains, meaning that retail sales exceed consumption by residents in the area. The retail analysis indicates the importance of tourism to Roslyn and the surrounding region.

Although Roslyn experiences an overall retail gain, there are opportunities to capture leakage in key categories. The chart below shows retail leakage over the past year in select categories in the 10-minute drive time area, representing potential for future development. It is important to note, however, that general merchandise stores and pharmacies are not likely to develop in Roslyn because of its proximity to Cle Elum. Furthermore, the community isn't interested in chain style stores as indicated in the survey. However, clothing (especially small store types), crafts, jewelry, specialty food, home furnishings, sporting goods, and personal care items are opportunities.

Retail Leakage in Select Categories in the 10-Minute Drive Time Area

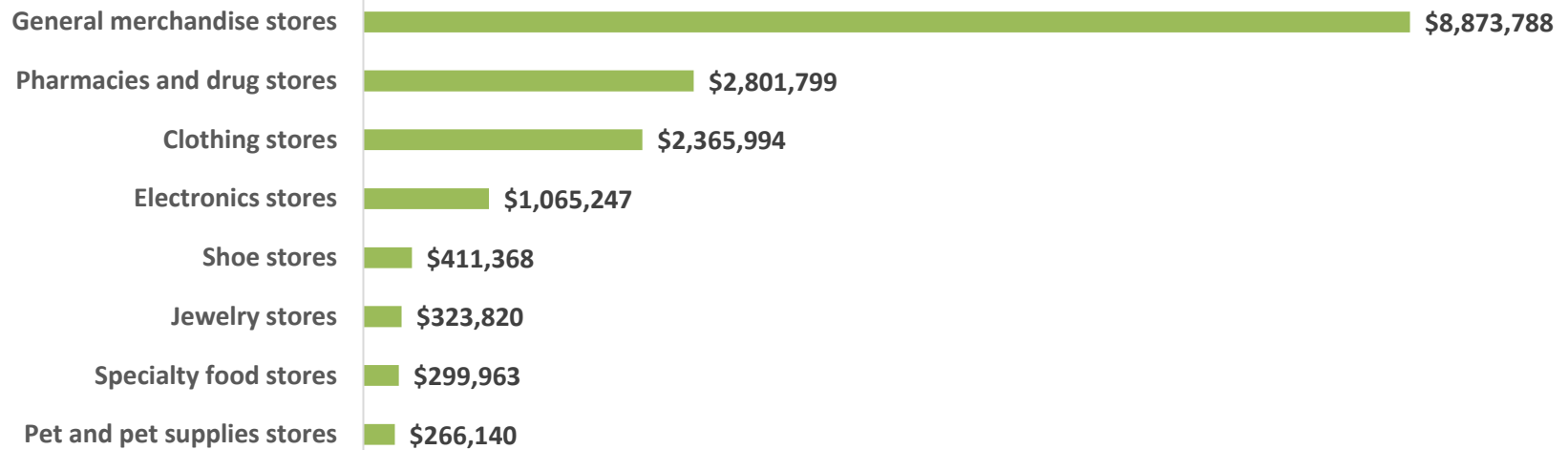


Figure 5: Retail Leakage in Select Categories in the 10-Minute Drive Time Area (Source: Environics Analytics)

Detailed Tables

The tables on the following four pages present the detailed findings of the retail market analysis for Roslyn and break out the broad retail data into specific opportunities based on retail sales categories. The numbers next to the categories represent North American Industrial Classification System (NAICS) codes and are used for every business type in the United States. Lower digit numbers represent broader categories and higher digit numbers represent subcategories.

Roslyn, WA (city)			
	2019 Demand (\$)	2019 Supply (\$)	Opportunity Gap/Surplus (\$)
Totals			
Total retail trade including food and drink (NAICS 44, 45 and 722)	21,172,218	27,965,893	-6,793,675
Total retail trade (NAICS 44 and 45)	18,628,913	21,057,792	-2,428,878
Motor Vehicle and Parts Dealers			
Motor vehicle and parts dealers (NAICS 441)	4,183,868	5,083,321	-899,453
Automobile dealers (NAICS 4411)	3,522,988	324	3,522,663
New car dealers (NAICS 44111)	3,194,952	324	3,194,628
Used car dealers (NAICS 44112)	328,035	0	328,035
Other motor vehicle dealers (NAICS 4412)	341,721	5,082,961	-4,741,240
Recreational vehicle dealers (NAICS 44121)	108,145	335,561	-227,416
Motorcycle, boat, and other motor vehicle dealers (NAICS 44122)	233,576	4,747,400	-4,513,823
Boat dealers (NAICS 441222)	83,026	3,757,288	-3,674,261
Motorcycle, ATV, and all other motor vehicle dealers (NAICS 441228)	150,550	990,112	-839,562
Automotive parts, accessories, and tire stores (NAICS 4413)	319,159	36	319,123
Automotive parts and accessories stores (NAICS 44131)	190,722	0	190,722
Tire dealers (NAICS 44132)	128,436	36	128,401
Furniture and Home Furnishings Stores			
Furniture and home furnishings stores (NAICS 442)	417,951	1,033,905	-615,954
Furniture stores (NAICS 4421)	217,929	1,033,902	-815,973
Home furnishings stores (NAICS 4422)	200,022	3	200,019
Floor covering stores (NAICS 44221)	74,090	3	74,087
Other home furnishings stores (NAICS 44229)	125,932	0	125,932
Window treatment stores (NAICS 442291)	5,871	0	5,871
All other home furnishings stores (NAICS 442299)	120,061	0	120,061
Electronics and Appliance Stores			
Electronics and appliance stores (NAICS 443)	353,532	6	353,526
Household appliance stores (NAICS 443141)	48,797	0	48,797
Electronics stores (NAICS 443142)	304,735	6	304,729
Building Material and Garden Equipment and Supplies Dealers			
Building material and garden equipment and supplies dealers (NAICS 444)	1,604,772	1,484,996	119,776
Building material and supplies dealers (NAICS 4441)	1,381,517	1,484,956	-103,439
Home centers (NAICS 44411)	757,263	1,466,128	-708,865
Paint and wallpaper stores (NAICS 44412)	36,694	68	36,626
Hardware stores (NAICS 44413)	117,790	4	117,786
Other building material dealers (NAICS 44419)	469,770	18,756	451,014
Lawn and garden equipment and supplies stores (NAICS 4442)	223,256	40	223,216
Outdoor power equipment stores (NAICS 44421)	34,286	11	34,275
Nursery, garden center, and farm supply stores (NAICS 44422)	188,969	29	188,940

Roslyn, WA (city)			
	2019 Demand (\$)	2019 Supply (\$)	Opportunity Gap/Surplus (\$)
Food and Beverage Stores			
Food and beverage stores (NAICS 445)	2,626,121	7,413,010	-4,786,889
Grocery stores (NAICS 4451)	2,292,415	6,724,026	-4,431,611
Supermarkets and other grocery (except convenience) stores (NAICS 44511)	2,190,193	6,723,979	-4,533,786
Convenience stores (NAICS 44512)	102,222	47	102,175
Specialty food stores (NAICS 4452)	80,962	3	80,959
Meat markets (NAICS 44521)	26,552	1	26,551
Fish and seafood markets (NAICS 44522)	9,744	1	9,742
Fruit and vegetable markets (NAICS 44523)	16,624	0	16,624
Other specialty food stores (NAICS 44529)	28,042	0	28,042
Baked goods stores and confectionery and nut stores (NAICS 445291 + 445292)	15,036	0	15,036
All other specialty food stores (NAICS 445299)	13,006	0	13,006
Beer, wine, and liquor stores (NAICS 4453)	252,744	688,981	-436,237
Health and Personal Care Stores			
Health and personal care stores (NAICS 446)	1,180,142	4	1,180,138
Pharmacies and drug stores (NAICS 44611)	975,337	4	975,332
Cosmetics, beauty supplies, and perfume stores (NAICS 44612)	74,628	0	74,628
Optical goods stores (NAICS 44613)	47,246	0	47,246
Other health and personal care stores (NAICS 44619)	82,932	0	82,932
Food (health) supplement stores (NAICS 446191)	30,316	0	30,316
All other health and personal care stores (NAICS 446199)	52,616	0	52,616
Gasoline Stations			
Gasoline stations (NAICS 447)	1,810,046	5,206,063	-3,396,017
Clothing and Clothing Accessories Stores			
Clothing and clothing accessories stores (NAICS 448)	899,823	3	899,821
Clothing stores (NAICS 4481)	674,024	1	674,023
Men's clothing stores (NAICS 44811)	32,098	0	32,098
Women's clothing stores (NAICS 44812)	138,988	1	138,987
Children's and infants' clothing stores (NAICS 44813)	29,866	0	29,866
Family clothing stores (NAICS 44814)	386,452	0	386,452
Clothing accessories stores (NAICS 44815)	34,572	0	34,572
Other clothing stores (NAICS 44819)	52,048	0	52,048
Shoe stores (NAICS 4482)	114,918	0	114,918
Jewelry, luggage, and leather goods stores (NAICS 4483)	110,881	2	110,880
Jewelry stores (NAICS 44831)	99,961	1	99,960
Luggage and leather goods stores (NAICS 44832)	10,921	1	10,920

Roslyn, WA (city)			
	2019 Demand (\$)	2019 Supply (\$)	Opportunity Gap/Surplus (\$)
Sporting Goods, Hobby, Musical Instrument, and Book Stores			
Sporting goods, hobby, musical instrument, and book stores (NAICS 451)	278,474	152,744	125,730
Sporting goods, hobby, and musical instrument stores (NAICS 4511)	242,310	152,744	89,566
Sporting goods stores (NAICS 45111)	154,253	152,742	1,511
Hobby, toy, and game stores (NAICS 45112)	61,082	0	61,082
Sewing, needlework, and piece goods stores (NAICS 45113)	13,561	0	13,560
Musical instrument and supplies stores (NAICS 45114)	13,414	2	13,412
Book stores and news dealers (NAICS 4512)	36,164	0	36,164
Book stores (NAICS 451211)	33,100	0	33,100
News dealers and newsstands (NAICS 451212)	3,065	0	3,065
General Merchandise Stores			
General merchandise stores (NAICS 452)	2,469,293	8	2,469,285
Department stores (NAICS 4522)	521,867	0	521,867
Other general merchandise stores (NAICS 4523)	1,947,426	8	1,947,418
Warehouse clubs and supercenters (NAICS 452311)	1,649,952	8	1,649,943
All other general merchandise stores (NAICS 452319)	297,475	0	297,475
Miscellaneous Store Retailers			
Miscellaneous store retailers (NAICS 453)	417,192	683,726	-266,534
Florists (NAICS 4531)	27,588	113	27,475
Office supplies, stationery, and gift stores (NAICS 4532)	89,967	404,704	-314,737
Office supplies and stationery stores (NAICS 45321)	41,510	0	41,510
Gift, novelty, and souvenir stores (NAICS 45322)	48,457	404,704	-356,247
Used merchandise stores (NAICS 4533)	68,491	146	68,345
Other miscellaneous store retailers (NAICS 4539)	231,146	278,763	-47,616
Pet and pet supplies stores (NAICS 45391)	74,832	194	74,638
Art dealers (NAICS 45392)	28,934	259	28,674
Manufactured (mobile) home dealers (NAICS 45393)	21,890	237	21,653
All other miscellaneous store retailers (NAICS 45399)	105,491	278,073	-172,582
Tobacco stores (NAICS 453991)	30,338	216,038	-185,700
All other miscellaneous store retailers (except tobacco stores) (NAICS 453998)	75,153	62,035	13,118

Roslyn, WA (city)			
	2019 Demand (\$)	2019 Supply (\$)	Opportunity Gap/Surplus (\$)
Non-store Retailers			
Non-store retailers (NAICS 454)	2,387,699	6	2,387,694
Electronic shopping and mail-order houses (NAICS 4541)	2,073,595	0	2,073,595
Vending machine operators (NAICS 4542)	31,046	0	31,046
Direct selling establishments (NAICS 4543)	283,059	6	283,053
Fuel dealers (NAICS 45431)	115,826	6	115,821
Other direct selling establishments (NAICS 45439)	167,232	0	167,232
Food Services and Drinking Places			
Food services and drinking places (NAICS 722)	2,543,305	6,908,102	-4,364,797
Special food services (NAICS 7223)	211,792	0	211,792
Food service contractors (NAICS 72231)	172,662	0	172,662
Caterers (NAICS 72232)	35,962	0	35,962
Mobile food services (NAICS 72233)	3,168	0	3,168
Drinking places (alcoholic beverages) (NAICS 7224)	119,875	324,606	-204,732
Restaurants and other eating places (NAICS 7225)	2,211,638	6,583,495	-4,371,857
Full-service restaurants (NAICS 722511)	1,132,329	2,988,628	-1,856,299
Limited-service restaurants (NAICS 722513)	892,517	3,283,543	-2,391,026
Cafeterias, grill buffets, and buffets (NAICS 722514)	33,298	3	33,294
Snack and non-alcoholic beverage bars (NAICS 722515)	153,494	311,321	-157,826
Ice cream, soft serve and frozen yogurt shops (NAICS 7225151C + 7225152)	23,441	107	23,334
Doughnut shops (NAICS 7225153)	24,177	180	23,997
Bagel shops (NAICS 7225154)	6,986	501	6,485
Coffee shops (NAICS 7225155)	65,553	143,756	-78,203
Cookie shops (NAICS 7225156)	1,063	21,217	-20,154
Other snack and non-alcoholic beverage bars (NAICS 7225157)	32,274	145,560	-113,286

6. Recommendations

While both the survey and the economic analysis point to opportunities and challenges for Roslyn, a key issue of Roslyn is that outside influences are having a dramatic impact on the character of the community. While Roslyn has maintained a small-town feel, a close connection with the outdoors, independent businesses, and a strong community spirit; seasonal visitors to the community, housing costs, lack of local jobs, and large developments adjacent to Roslyn present challenges outside of the control of local residents.

With that said, the following recommendations are divided into two parts:

1. Enhancing Economic Opportunities
2. Curating the Visitor Experience

Enhancing Economic Opportunities

The following recommendations are designed to offer alternatives for Roslyn that are consistent with local desires as well as opportunities to grow the retail base, offer ways for locals to pursue other income streams, enhance the retail/restaurant climate of downtown, and curate the unique character of the community.

- **Pursue Emporium Style Retail:** With the closure of the Harper Lumber Company, Roslyn now faces the largest retail vacancy in downtown in recent history. A portion of this property could be repurposed into an emporium style retail store that allows for local craftsmen, artisans, makers, and specialty food vendors to occupy space with a single point of sale. A successful model of the emporium style store can be found in Kittitas, Washington where a former hardware store has been converted into fourteen spaces for independent retailers.
- **Consider A Rotating Restaurant:** Communities are now experimenting with allowing chefs to populate restaurant spaces in town on a temporary basis using existing

kitchens as places to host special dining nights. A restaurant in Maryland is opening during breakfast and lunch and allowing a local restaurateur to offer specialty cuisine one or two nights a week.

- **Explore Indoor Recreation Spaces:** Climbing walls, indoor skate parks, and similar activity centers are becoming very popular as downtowns try to attract local young people and visitors alike. Vancouver, Washington is home to Source Climbing Center which is located in a store front on Main Street. They offer kids classes, group outings, and special men's and ladie's nights for climbing. These type of uses can occur in existing storefronts, create employment opportunities, and attract local families.
- **Explore Specialty Food/Grocer:** While traditional grocery store spaces in the area are saturated, specialty food is still an opportunity for Roslyn. These types of businesses flourish when they offer take our food/sandwiches as well as specialty grocery items. This could happen within existing businesses as they consider diversifying their offerings.
- **Launch a Targeted Grant Program:** Consider special grants for façade improvements that preserve the historic charm of Roslyn. These can be small targeted grants to replace windows, awnings, storefronts, and siding to be in keeping with the look of downtown.

Curating the Visitor Experience

The following recommendations recognize that Roslyn has reached a saturation point in key months with visitors to the region, has a growing resort destination immediately adjacent to the community, and is a "first tier" destination for the Seattle/Tacoma metropolitan area as it ventures out in prime tourism months.

- **Develop Temporary Signs Directing Visitors to Parking Resources:** Both the lot near S. A Street and Parking at Roslyn Pioneer Park offer opportunities to take the pressure off of on street parking on Pennsylvania Avenue especially during the high season and market days. Temporary signs (that may become permanent over time) should be placed on peak days directing visitors to use these lots.
- **Enforce Timed On-Street Parking During Peak Times:** Evidence indicates in the survey and in conversations within Roslyn that visitors and employees are using critical on street spaces for extended periods of time. These spaces are critical to the day-to-day operation of businesses in Roslyn. The community should consider targeted enforcement of parking regulations during key times. With technology allowing for apps to be downloaded on phones and easy adaptable printers, the cost of enforcement has diminished greatly. It isn't necessary for parking to be enforced year-round however, frequent offenders, and high demand parking days should be enforced to ensure the parking resources in the community are protected for customers.
- **Create Pedestrian Orientation Signs:** With visitors directed to park at locations not within the core of downtown, simple orientation signs should be considered to direct people to key locations in town and for cyclists and hikers to get to trails. This will create a more pedestrian friendly environment and in many cases ease sign clutter.
- **Consider Consistent Design to Curate the Visitor Experience:** Information overload can be too much for a small community so having a consistent color, typeface, and sign design system for the above recommendations should be considered in Roslyn. The following typefaces, colors, and sign concepts are simple examples on how a system can be employed and carry over from signs to brochures, to business directories, and event promotion.

