



EDC
ISLAND
COUNTY

Island County Retail Leakage and Surplus Analysis

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**Economic Development Council
for Island County**
PO Box 279
Coupeville, WA 98239
www.iscoedc.com
(360) 678-6889

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Overview

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

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

Due to the sources from which much of the data is derived (U.S. Census), this report uses 2022 data, which is the most recent, complete data set available. This is normal because of the time needed to aggregate and consolidate data for a period of time. This data is relevant and allows a baseline from which subsequent years can be compared.

Understanding Retail Leakage

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

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

Understanding Retail Surplus

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

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

Overview

Interpreting Leakage Index Graphs

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

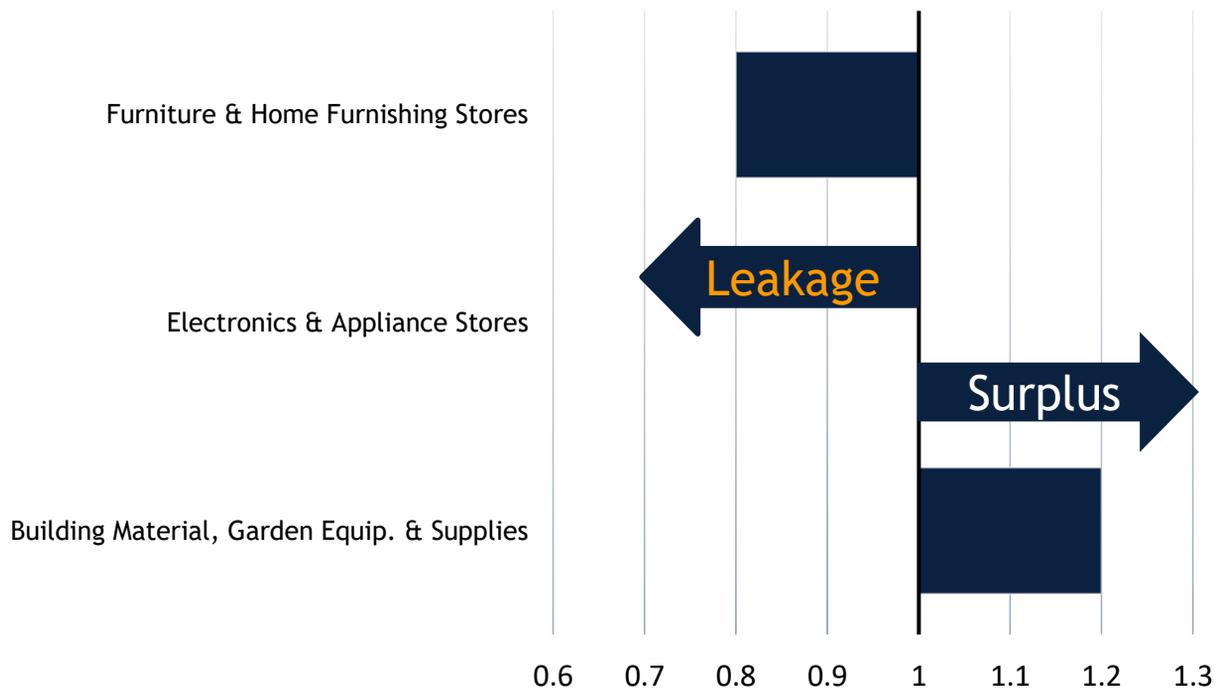
1.0=equilibrium, meaning that demand and sales in the area being analyzed are in balance.

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

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

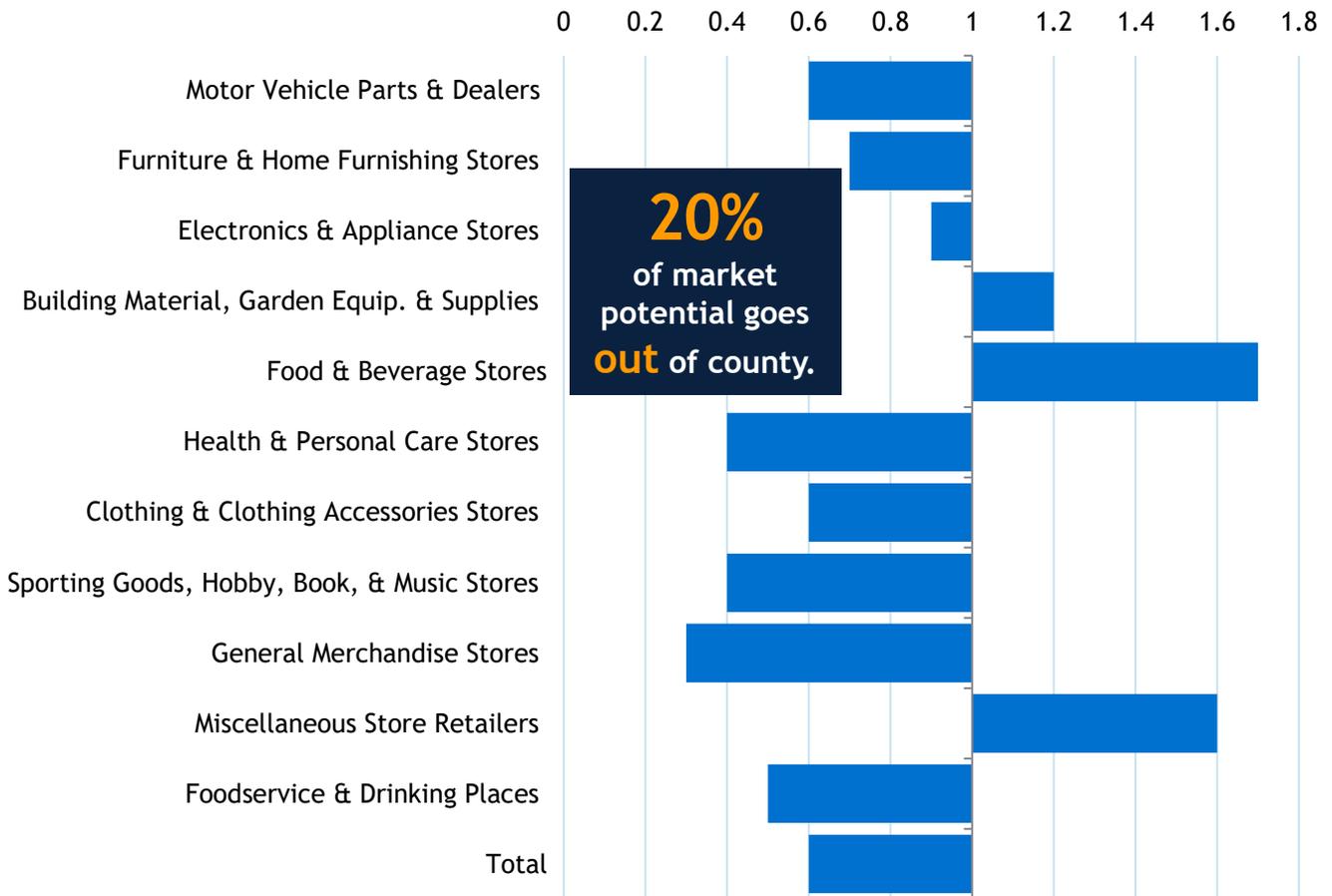
All estimates, projections or forecasts in this model are subject to errors, including statistical error, error due to the subjective nature of some data, error due to changes in demographics, error based on lagging competitor information or growth data, and error due to factors that are not included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

Sample Leakage and Surplus



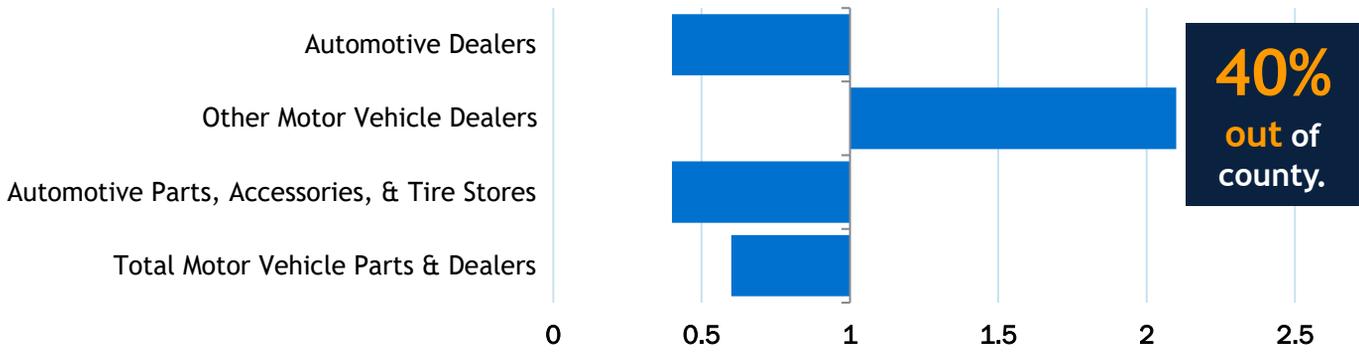
Island County

Leakage or Surplus



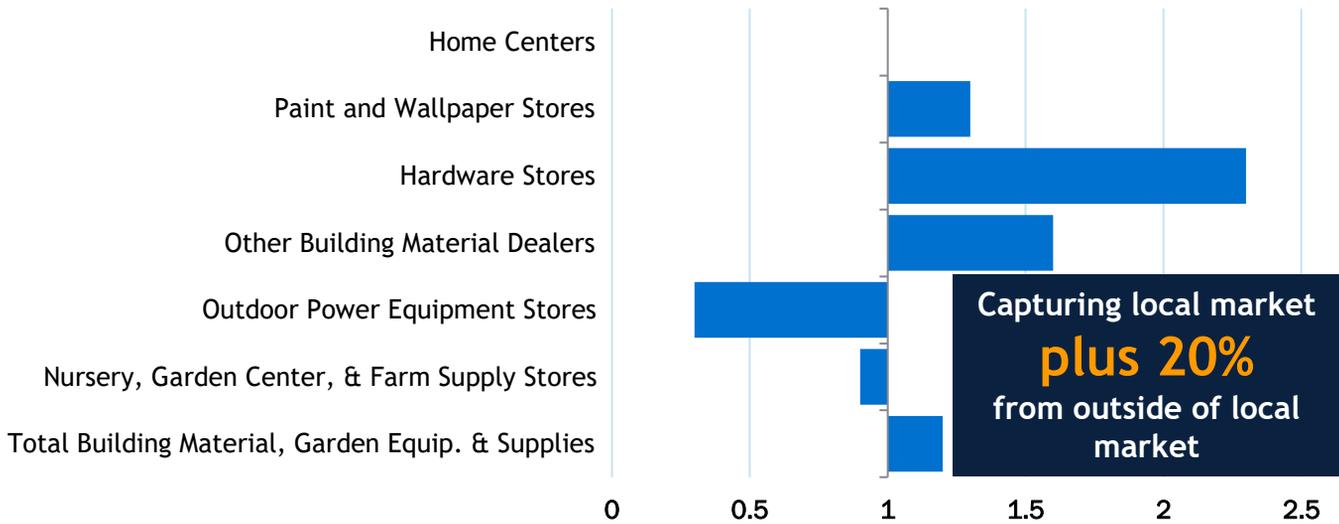
Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	383,602,702	237,384,230	0.6
Furniture & Home Furnishing Stores	42,404,468	30,782,236	0.7
Electronics & Appliance Stores	31,491,782	28,986,326	0.9
Building Material, Garden Equip. & Supplies	129,841,116	161,565,551	1.2
Food & Beverage Stores	259,317,764	435,344,243	1.7
Health & Personal Care Stores	116,825,472	52,461,264	0.4
Clothing & Clothing Accessories Stores	68,718,012	38,485,896	0.6
Sporting Goods, Hobby, Book, & Music Stores	51,833,371	17,183,348	0.3
General Merchandise Stores	246,353,165	102,350,359	4
Miscellaneous Store Retailers	41,124,437	65,594,343	1.6
Foodservice & Drinking Places	227,528,481	105,023,013	0.4
Total	1,599,040,769	1,275,160,809	0.8

Motor Vehicle Parts



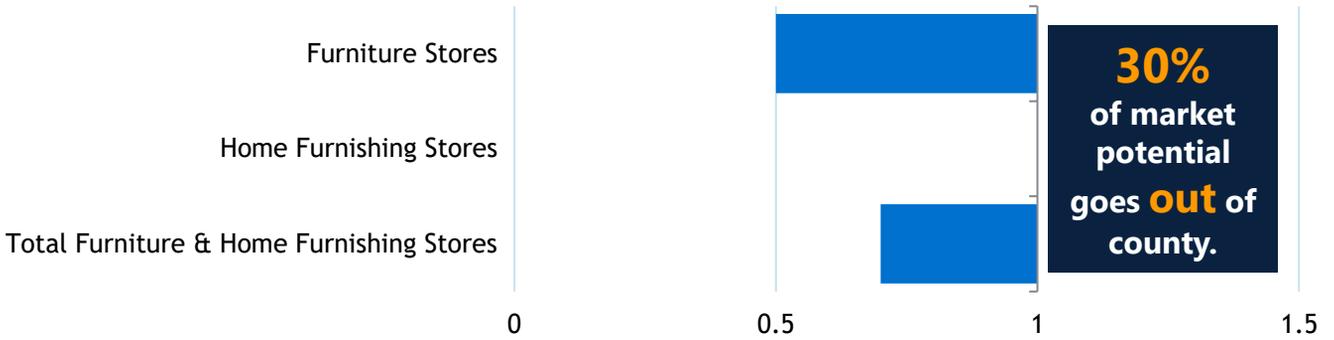
Store Type	Potential	Estimated	Surplus/Leakage
Automotive Dealers	303,835,217	127,445,125	0.4
Other Motor Vehicle Dealers	47,369,817	97,537,962	2.1
Automotive Parts, Accessories, & Tire Stores	32,397,668	12,401,143	0.4
Total Motor Vehicle Parts & Dealers	383,602,702	237,384,230	0.6

Building, Garden, and Supplies



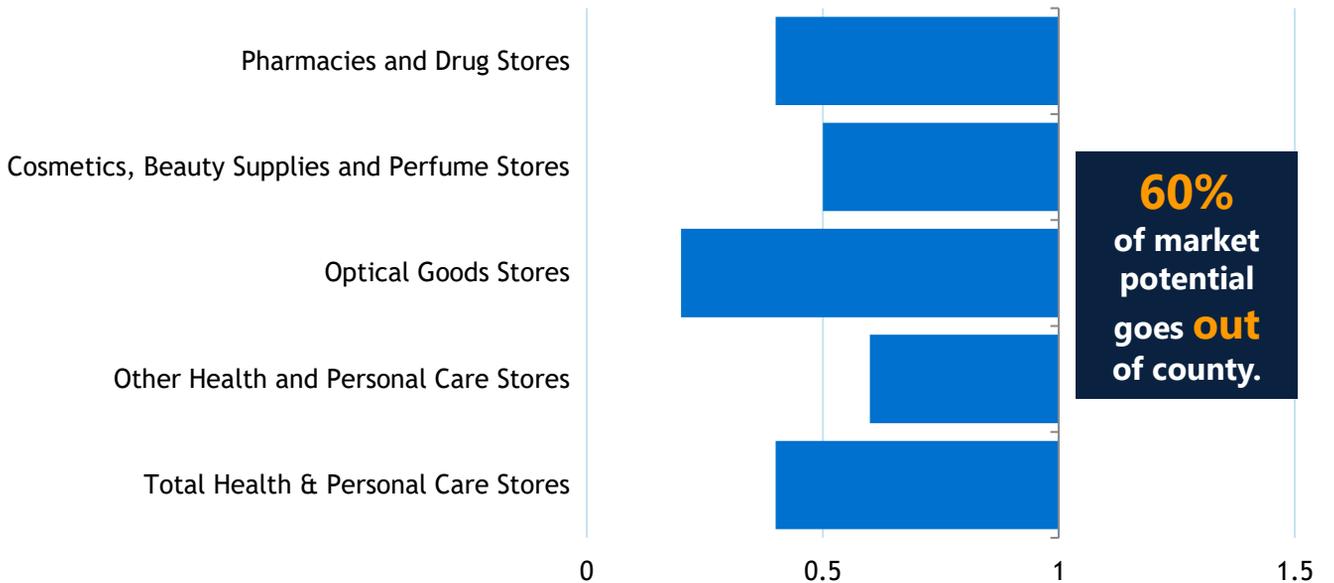
Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	64,820,402	66,363,577	1.0
Paint and Wallpaper Stores	3,357,719	4,499,393	1.3
Hardware Stores	8,945,590	20,744,972	2.3
Other Building Material Dealers	34,009,075	55,635,585	1.6
Outdoor Power Equipment Stores	3,842,626	1,016,472	0.3
Nursery, Garden Center, & Farm Supply Stores	14,865,704	13,305,551	0.9
Total Building Material, Garden Equip. & Supplies	129,841,116	161,565,551	1.2

Furniture Stores



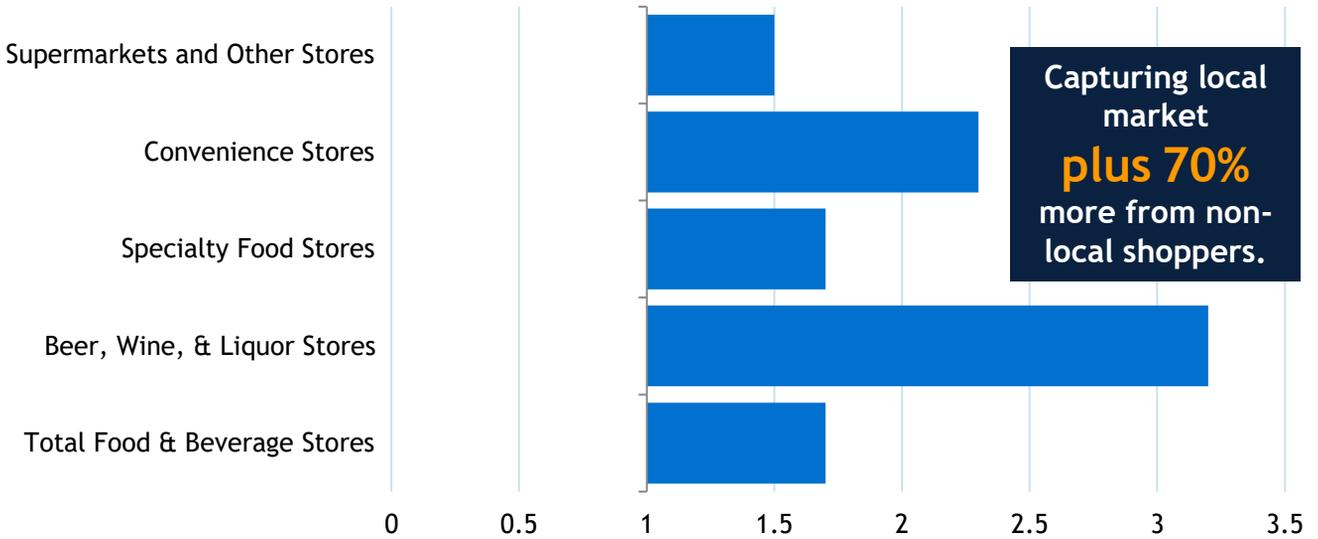
Store Type	Potential	Estimated	Surplus/Leakage
Furniture Stores	25,571,145	13,373,306	0.5
Home Furnishing Stores	16,833,323	17,408,929	1.0
Total Furniture & Home Furnishing Stores	42,404,468	30,782,236	0.7

Health and Personal Care



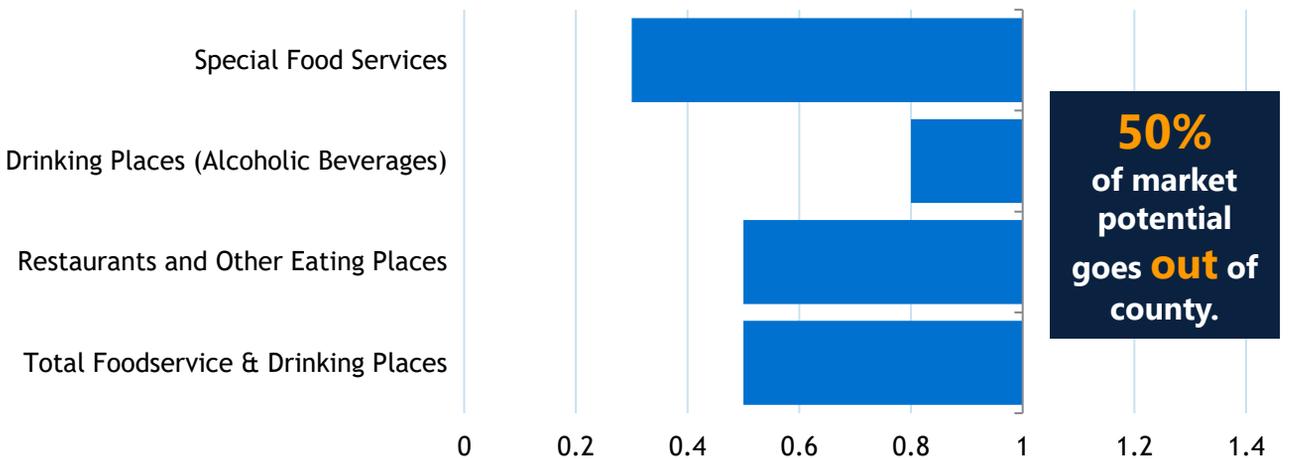
Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	99,134,923	44,318,451	0.4
Cosmetics, Beauty Supplies and Perfume Stores	7,481,018	3,877,282	0.5
Optical Goods Stores	4,259,153	929,513	0.2
Other Health and Personal Care Stores	5,950,378	3,336,018	0.6
Total Health & Personal Care Stores	116,825,472	52,461,264	0.4

Grocery



Store Type	Potential	Estimated	Surplus/Leakage
Supermarkets and Other Stores	223,698,129	223,698,129	1.5
Convenience Stores	9,038,665	20,820,106	2.3
Specialty Food Stores	7,167,159	11,986,388	1.7
Beer, Wine, & Liquor Stores	19,413,812	61,820,426	3.2
Total Food & Beverage Stores	259,317,764	435,344,243	1.7

Restaurant



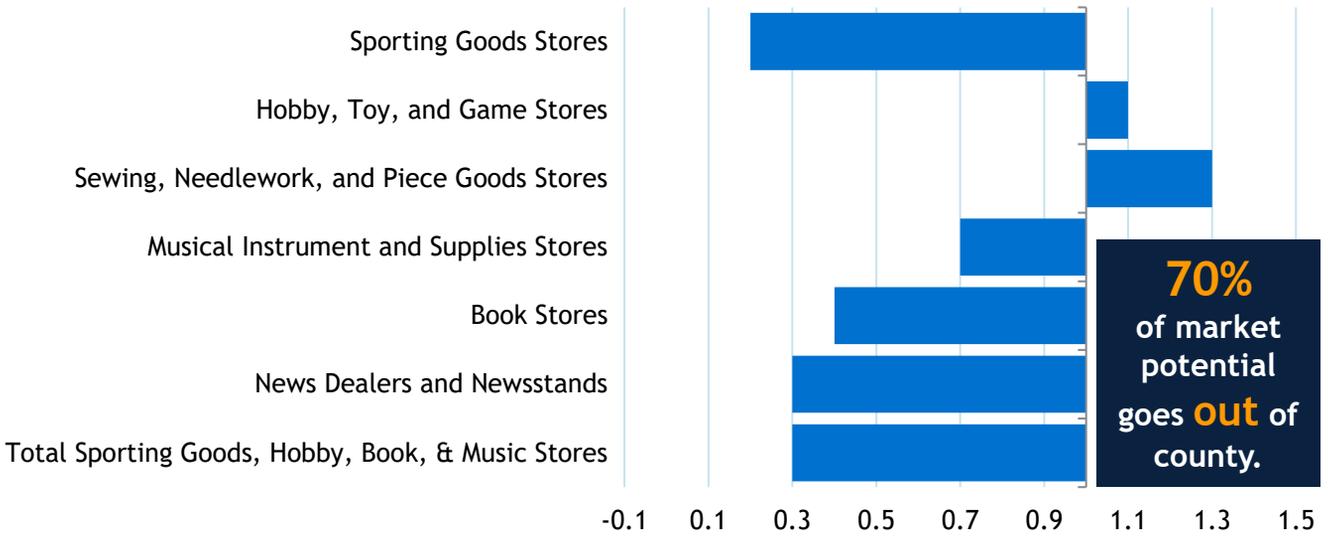
Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	12,861,263	3,804,097	0.3
Drinking Places (Alcoholic Beverages)	7,472,386	5,921,333	0.8
Restaurants and Other Eating Places	207,194,832	95,297,583	0.5
Total Foodservice & Drinking Places	227,528,481	105,023,013	0.5

Clothing and Accessories



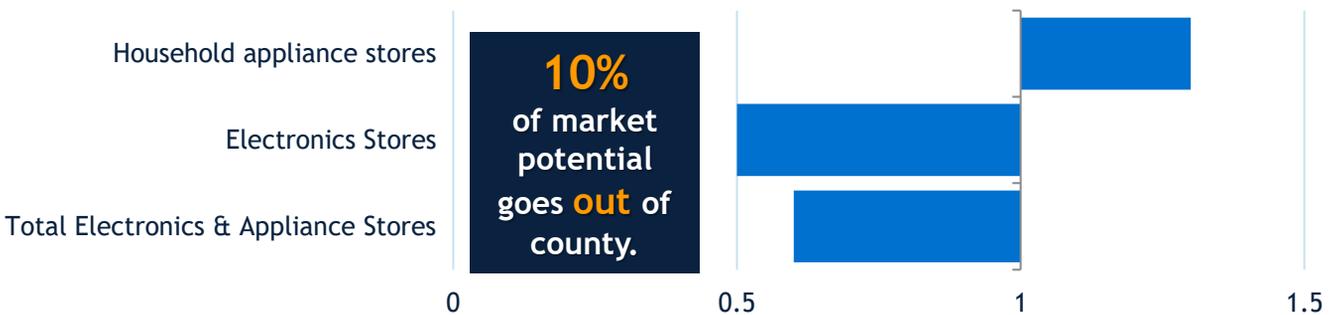
Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	1,509,563	519,516	0.3
Women's Clothing Stores	10,792,477	3,749,916	0.4
Children's and Infants' Clothing Stores	1,800,125	645,192	0.4
Family Clothing Stores	28,445,592	10,058,045	0.4
Clothing Accessories Stores	1,820,090	729,867	0.4
Other Clothing Stores	4,877,624	4,877,624	0.5
Shoe Stores	7,006,010	4,416,470	0.6
Jewelry Stores	12,028,595	15,498,538	1.3
Luggage & Leather Goods Stores	437,938	430,977	1.0
Total Clothing & Clothing Accessories Stores	68,718,012	38,485,896	0.6

Sporting Goods, Hobby, Books, and Music



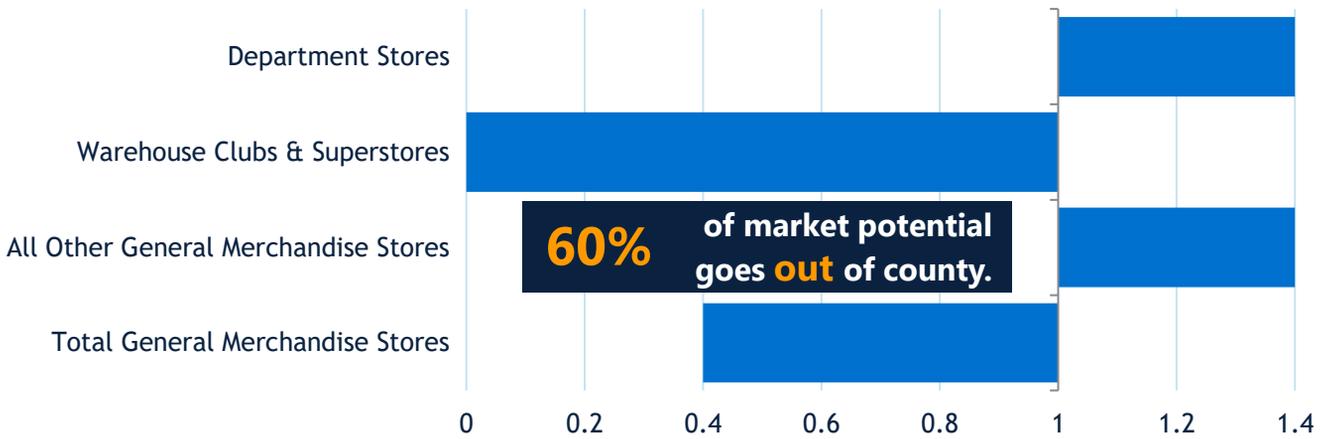
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	40,268,368	7,634,523	0.2
Hobby, Toy, and Game Stores	6,178,602	6,504,095	1.1
Sewing, Needlework, and Piece Goods Stores	941,698	1,263,190	1.3
Musical Instrument and Supplies Stores	919,634	622,420	0.7
Book Stores	2,179,675	817,759	0.4
News Dealers and Newsstands	1,345,394	341,362	0.3
Total Sporting Goods, Hobby, Book, & Music Stores	51,833,371	17,183,348	0.3

Electronics and Appliances



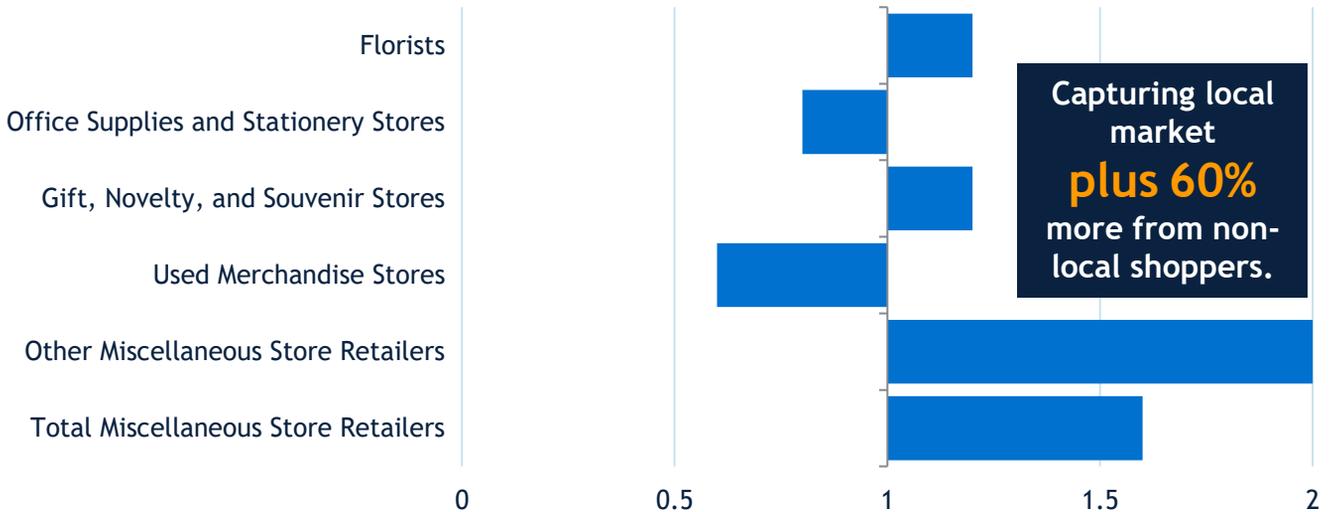
Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	6,581,888	10,586,115	1.6
Electronics Stores	24,909,894	18,400,210	0.7
Total Electronics & Appliance Stores	31,491,782	28,986,326	0.9

General Merchandise



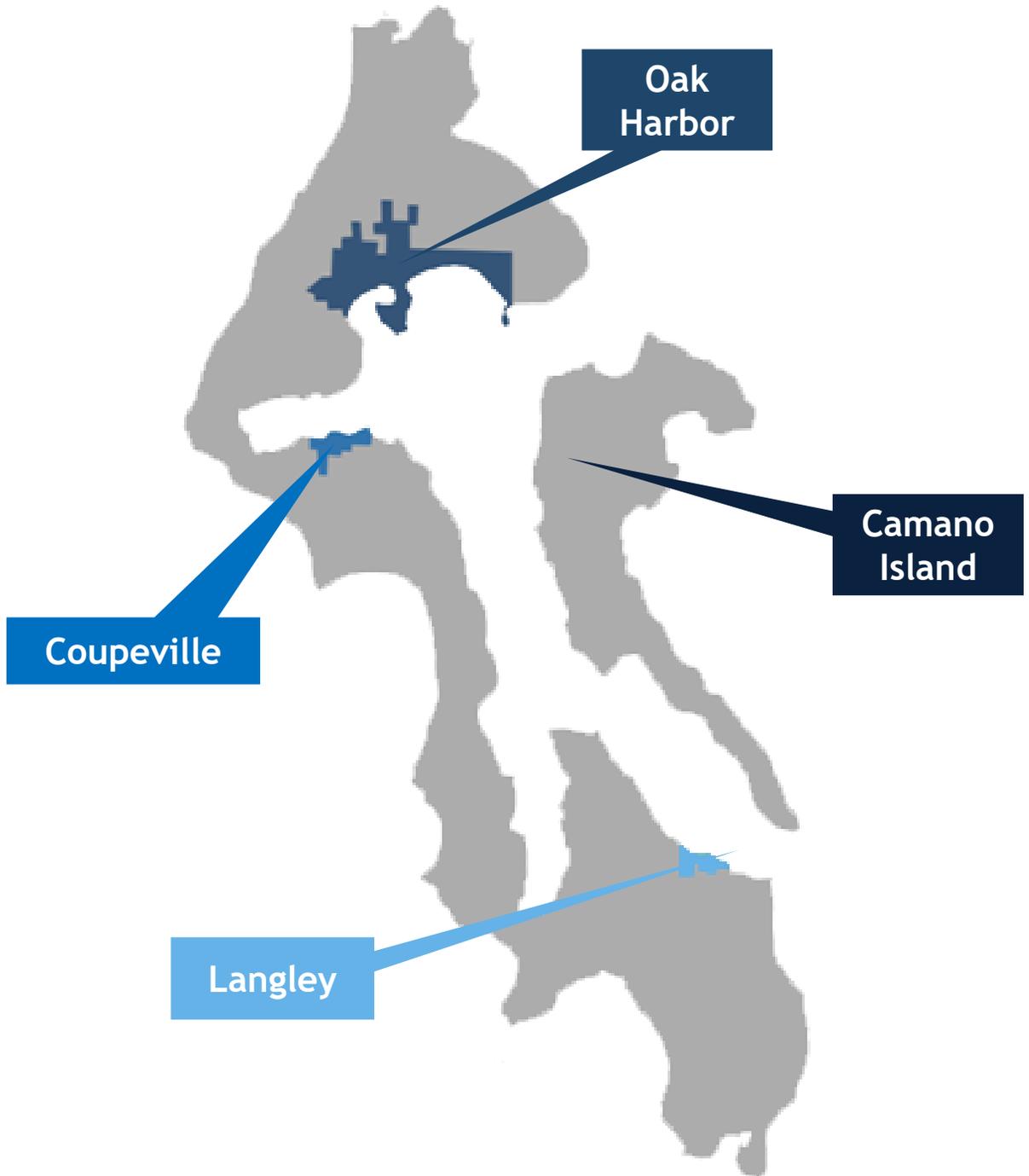
Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	40,236,363	55,025,046	1.4
Warehouse Clubs & Superstores	175,658,200	4,207,467	0.0
All Other General Merchandise Stores	30,458,601	43,117,846	1.4
Total General Merchandise Stores	246,353,165	102,350,359	0.4

Miscellaneous



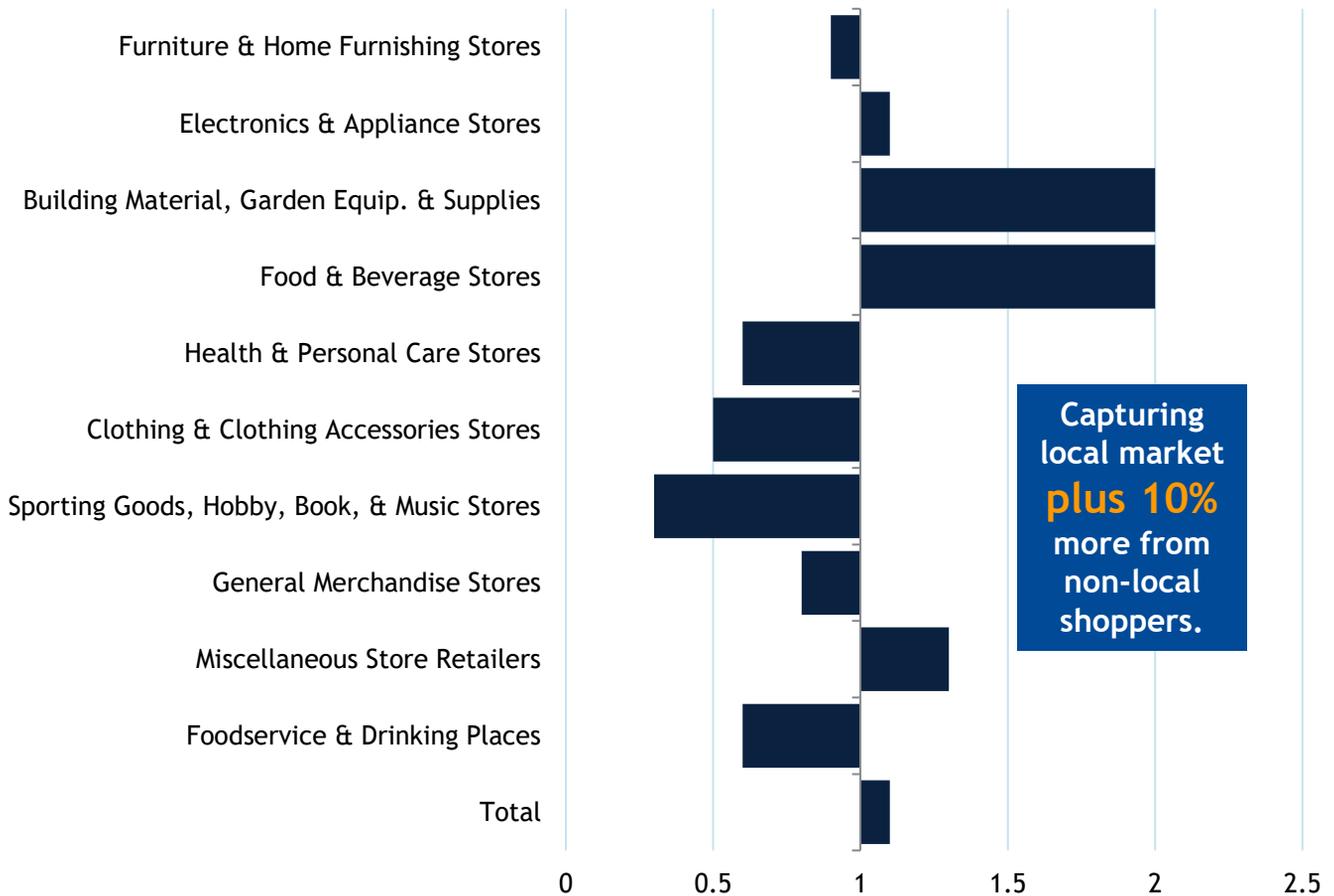
Store Type	Potential	Estimated	Surplus/Leakage
Florists	1,956,893	2,346,588	1.2
Office Supplies and Stationery Stores	3,630,325	2,743,096	0.8
Gift, Novelty, and Souvenir Stores	4,250,363	5,182,380	1.2
Used Merchandise Stores	4,108,596	2,272,431	0.6
Other Miscellaneous Store Retailers	27,178,260	53,049,848	2.0
Total Miscellaneous Store Retailers	41,124,437	65,594,343	1.6

Leakage and Surplus by Municipality and Camano Island



Oak Harbor

Leakage and Surplus



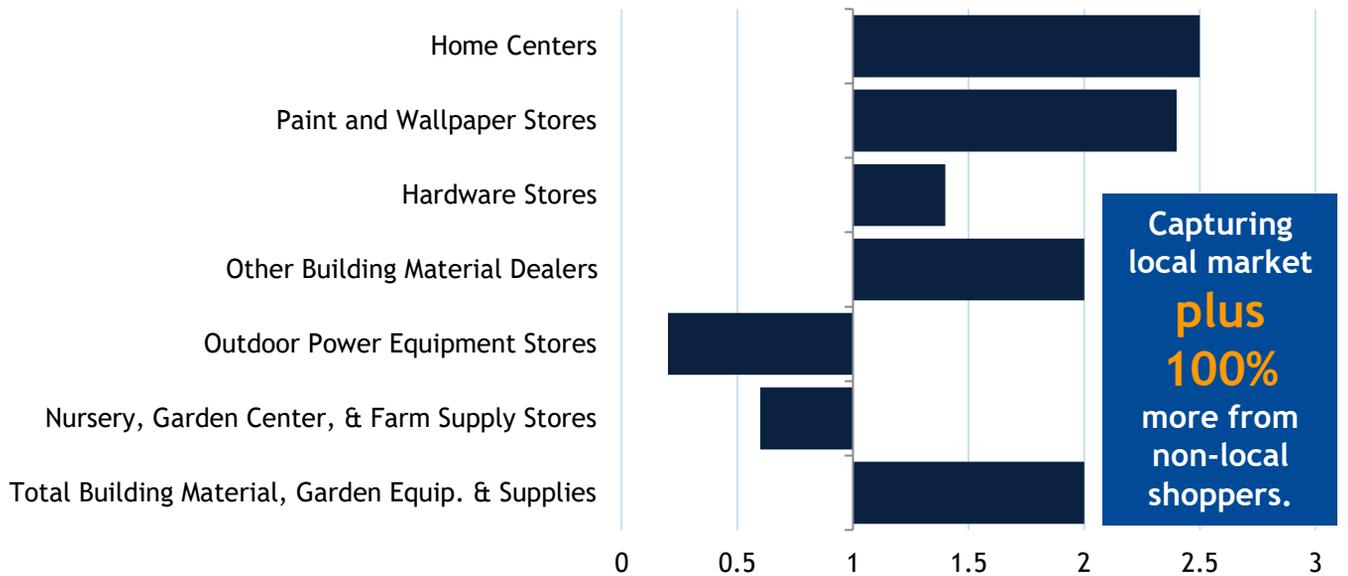
Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	146,258,263	171,931,921	1.2
Furniture & Home Furnishing Stores	16,668,285	15,668,171	0.9
Electronics & Appliance Stores	13,168,666	14,853,693	1.1
Building Material, Garden Equip. & Supplies	46,595,281	93,626,297	2.0
Food & Beverage Stores	104,846,358	214,572,378	2.0
Health & Personal Care Stores	43,088,660	25,105,590	0.6
Clothing & Clothing Accessories Stores	27,460,300	14,783,792	0.5
Sporting Goods, Hobby, Book, & Music Stores	24,319,858	7,966,164	0.3
General Merchandise Stores	99,457,943	76,421,233	0.8
Miscellaneous Store Retailers	15,716,357	20,683,774	1.3
Foodservice & Drinking Places	94,762,096	52,217,678	0.6
Total	632,342,067	707,830,691	1.1

Vehicles - Oak Harbor



Store Type	Potential	Estimated	Surplus/Leakage
Automotive Dealers	117,633,701	112,008,251	1.0
Other Motor Vehicle Dealers	16,127,839	51,162,569	3.2
Automotive Parts, Accessories, & Tire Stores	12,496,724	8,761,101	0.7
Total Motor Vehicle Parts & Dealers	146,258,263	171,931,921	1.2

Hardware - North Whidbey



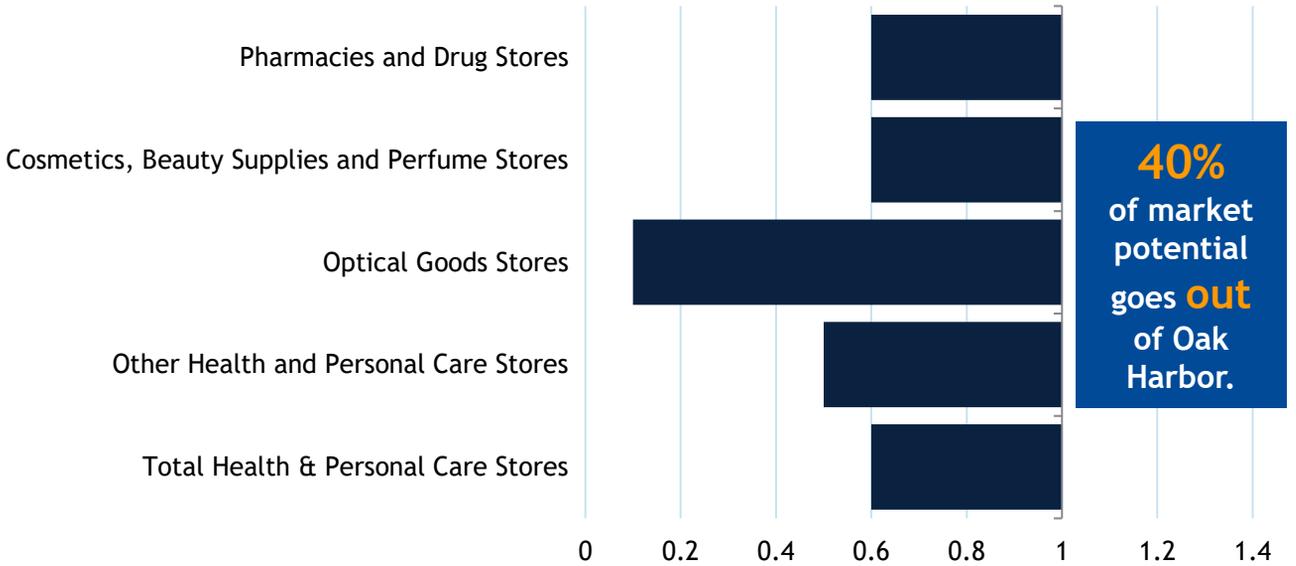
Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	23,653,600	58,502,587	2.5
Paint and Wallpaper Stores	993,097	2,427,646	2.4
Hardware Stores	3,175,570	4,365,734	1.4
Other Building Material Dealers	12,171,948	24,687,230	2.0
Outdoor Power Equipment Stores	1,338,794	314,701	0.2
Nursery, Garden Center, & Farm Supply Stores	5,262,273	3,328,399	0.6
Total Building Material, Garden Equip. & Supplies	46,595,281	93,626,297	2.0

Furniture - Oak Harbor



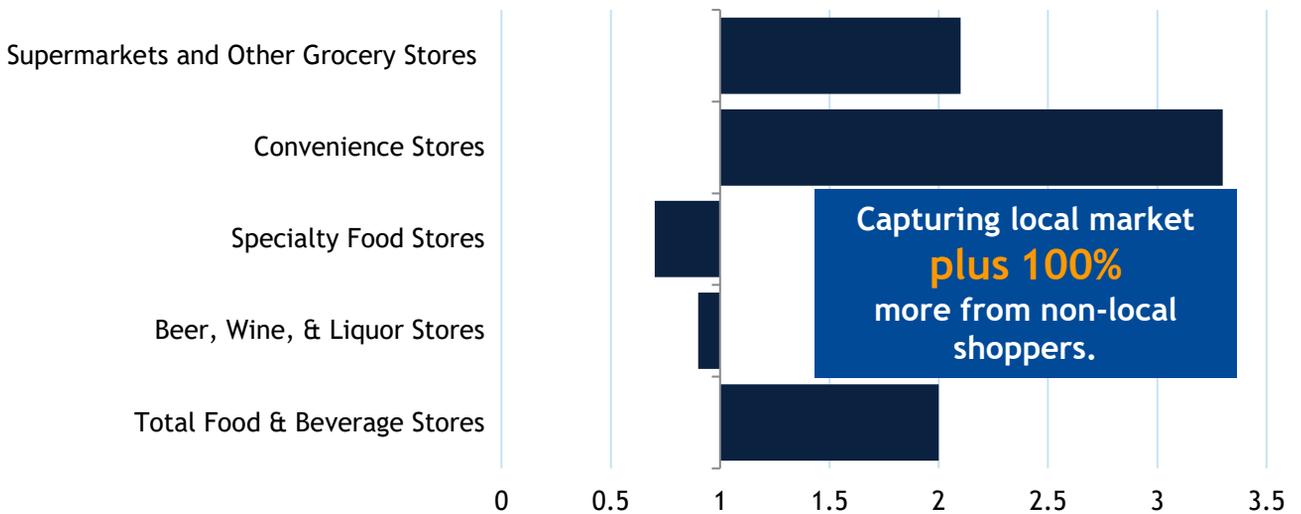
Store Type	Potential	Estimated	Surplus/Leakage
Furniture Stores	10,49,110	7,340,401	0.7
Home Furnishing Stores	6,176,175	8,327,770	1.3
Total Furniture & Home Furnishing Stores	16,668,285	15,668,171	0.9

Health - Oak Harbor



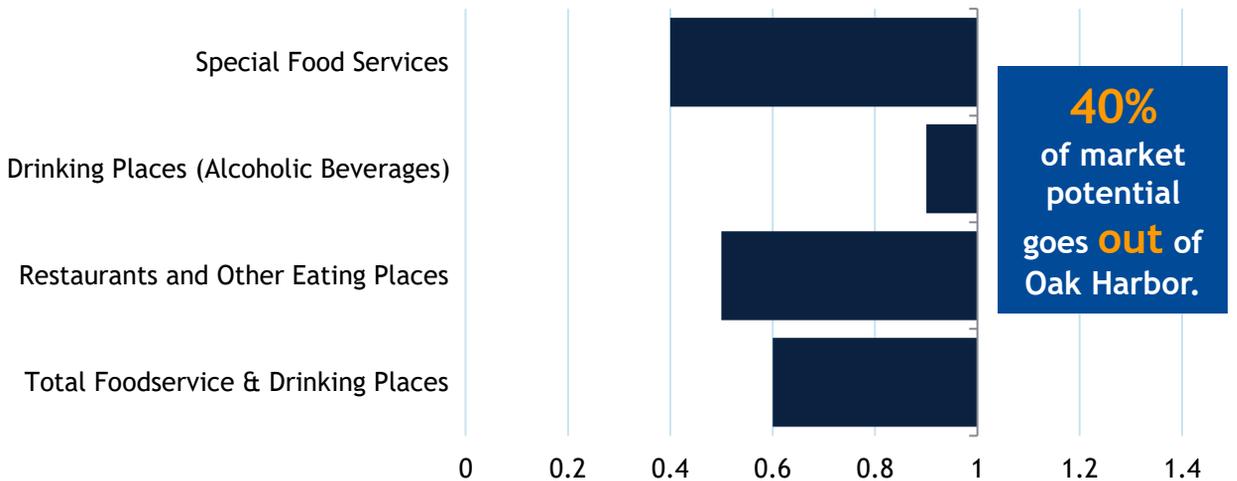
Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	36,594,803	22,175,157	0.6
Cosmetics, Beauty Supplies and Perfume Stores	2,720,663	1,679,365	0.6
Optical Goods Stores	1,593,069	234,107	0.1
Other Health and Personal Care Stores	2,180,125	1,016,961	0.5
Total Health & Personal Care Stores	43,088,660	25,105,590	0.6

Grocery - Oak Harbor



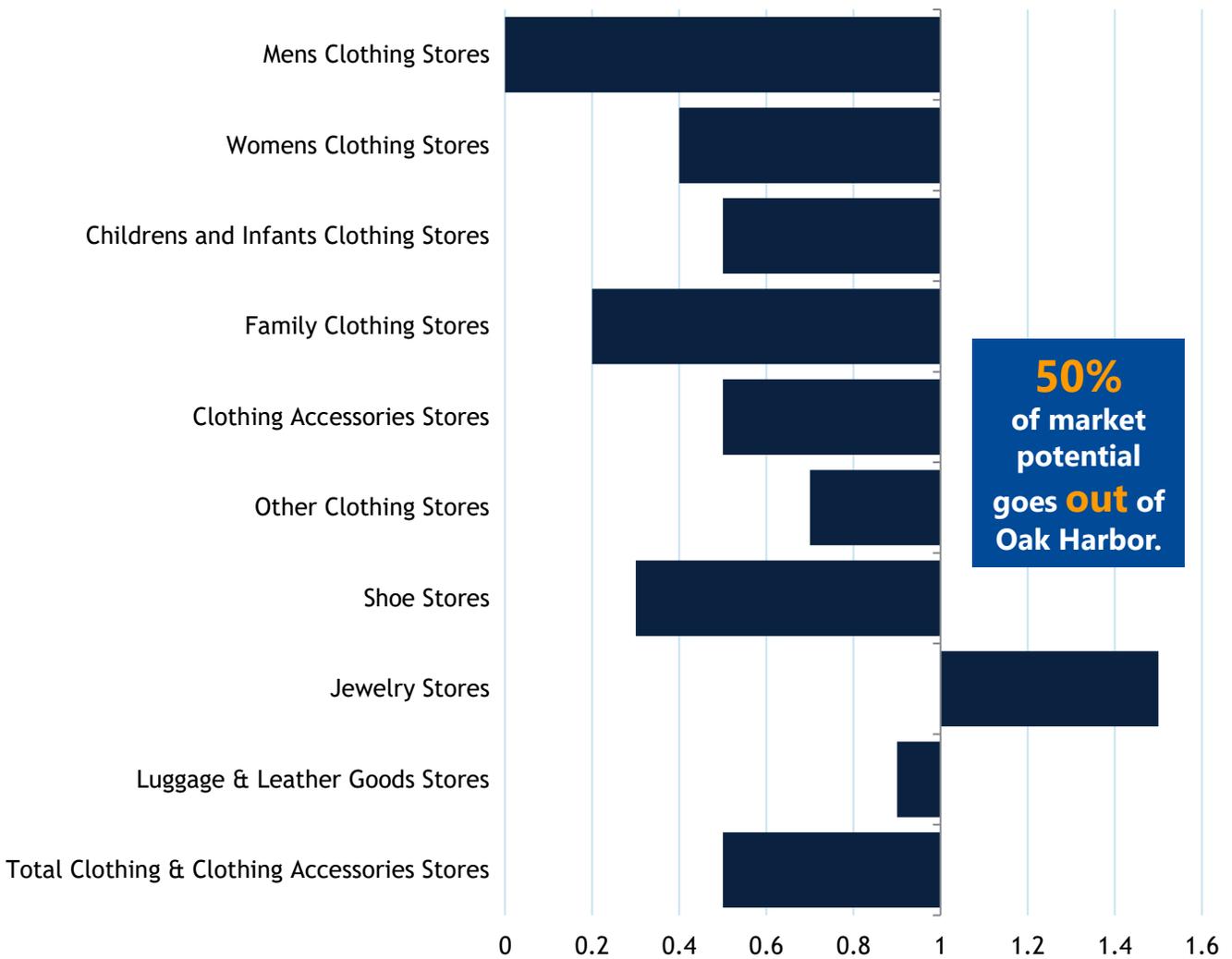
Store Type	Potential	Estimated	Surplus/Leakage
Supermarkets and Other Grocery Stores	90,727,523	193,138,461	2.1
Convenience Stores	3,730,410	12,471,949	3.3
Specialty Food Stores	2,926,934	2,048,940	0.7
Beer, Wine, & Liquor Stores	7,461,492	6,913,028	0.9
Total Food & Beverage Stores	104,846,358	214,572,378	2.0

Restaurants - Oak Harbor



Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	5,262,499	2,350,117	0.4
Drinking Places (Alcoholic Beverages)	2,790,236	2,403,258	0.9
Restaurants and Other Eating Places	86,709,360	47,464,304	0.5
Total Foodservice & Drinking Places	94,762,096	52,217,678	0.6

Clothing - Oak Harbor



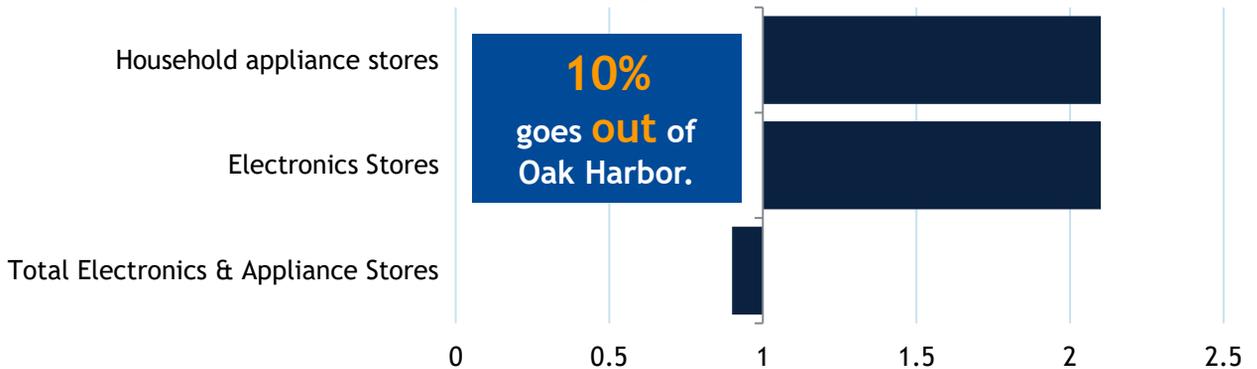
Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	629,225	0	0.0
Women's Clothing Stores	4,227,954	1,764,434	0.4
Children's and Infants' Clothing Stores	851,038	461,136	0.5
Family Clothing Stores	11,632,939	2,763,829	0.2
Clothing Accessories Stores	713,599	385,349	0.5
Other Clothing Stores	1,948,600	1,294,711	0.7
Shoe Stores	2,728,906	942,310	0.3
Jewelry Stores	4,555,511	7,024,728	1.5
Luggage & Leather Goods Stores	172,528	147,296	0.9
Total Clothing & Clothing Accessories Stores	27,460,300	14,783,792	0.5

Hobby - Oak Harbor



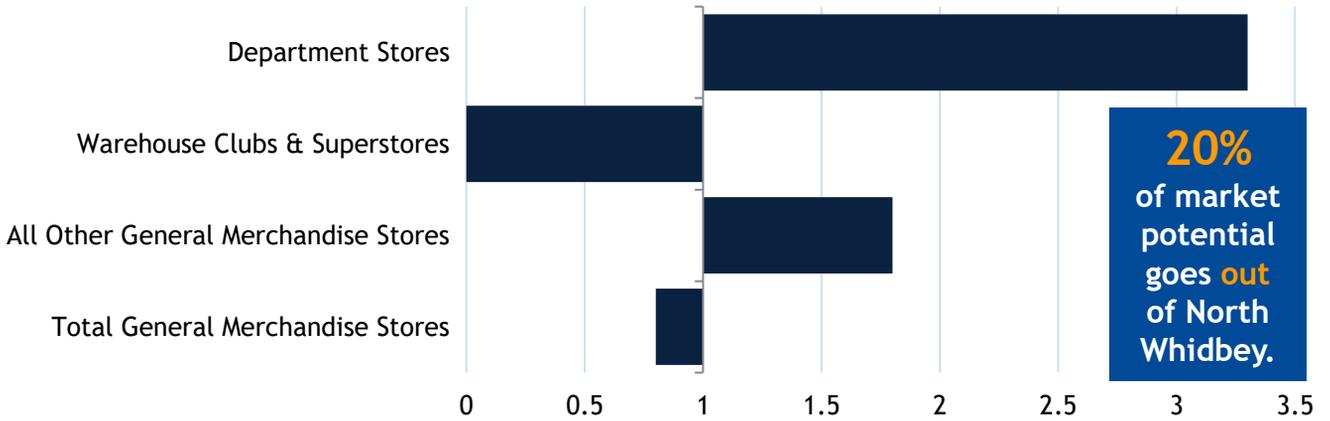
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	19,498,611	4,037,093	0.2
Hobby, Toy, and Game Stores	2,596,529	2,970,969	1.1
Sewing, Needlework, and Piece Goods Stores	351,054	509,934	1.5
Musical Instrument and Supplies Stores	437,672	252,249	0.6
Book Stores	870,046	189,373	0.2
News Dealers and Newsstands	565,947	6,546	0.0
Total Sporting Goods, Hobby, Book, & Music Stores	24,319,858	7,966,164	0.3

Electronics - Oak Harbor



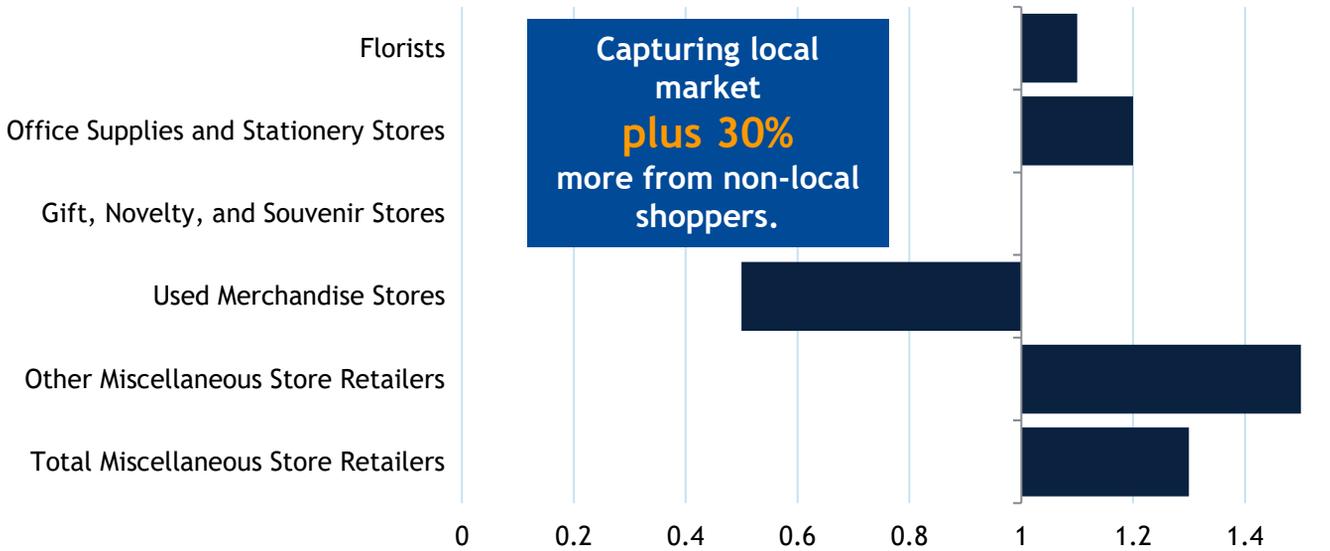
Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	2,663,686	5,523,796	2.1
Electronics Stores	2,663,686	5,523,796	2.1
Total Electronics & Appliance Stores	10,504,980	9,329,897	0.9

General Merchandise - Oak Harbor



Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	16,260,098	52,954,164	3.3
Warehouse Clubs & Superstores	71,058,041	2,089,549	0.0
All Other General Merchandise Stores	12,139,803	21,377,520	1.8
Total General Merchandise Stores	99,457,943	76,421,233	0.8

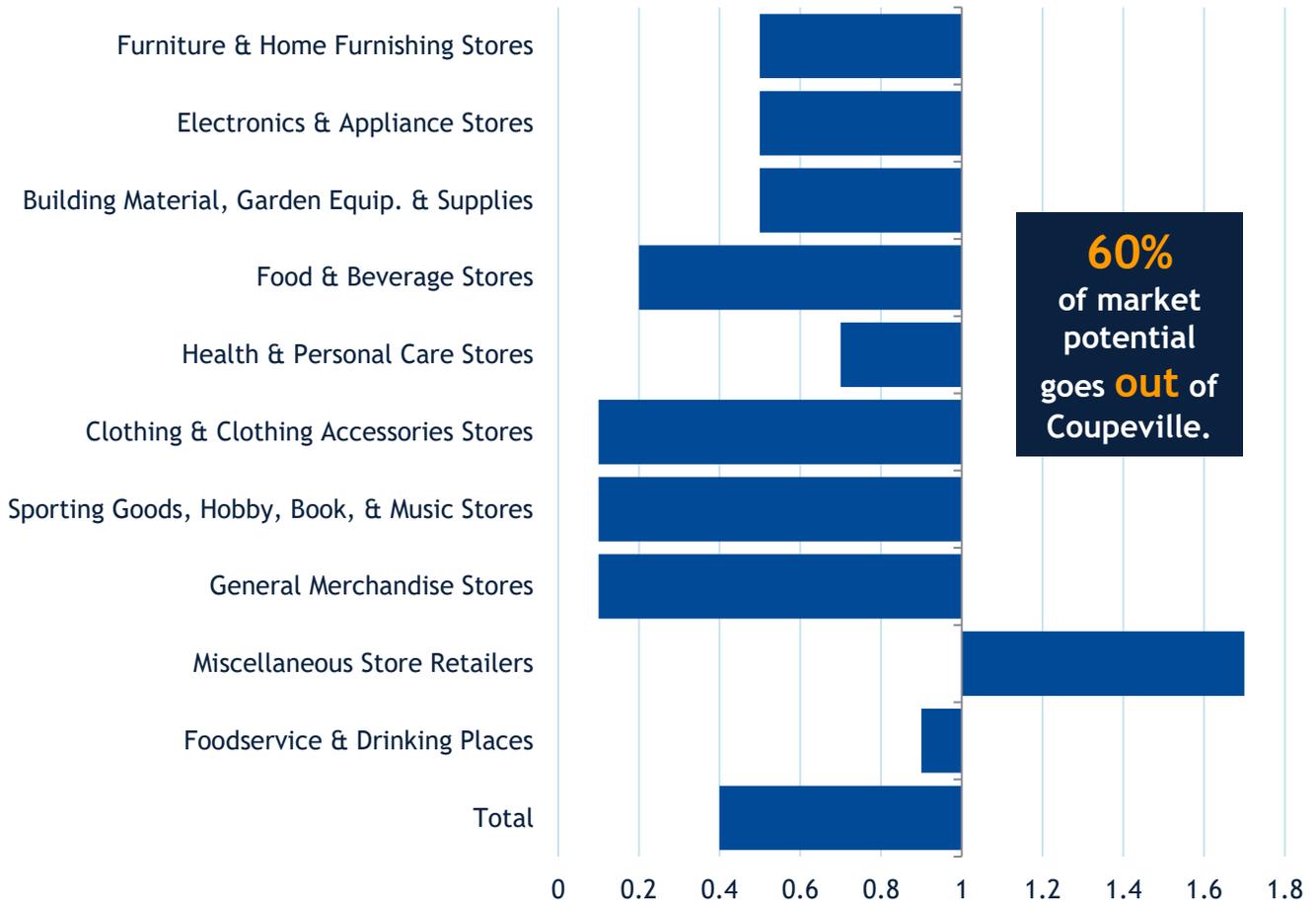
Miscellaneous - Oak Harbor



Store Type	Potential	Estimated	Surplus/Leakage
Florists	685,249	723,101	1.1
Office Supplies and Stationery Stores	1,411,089	1,726,794	1.2
Gift, Novelty, and Souvenir Stores	1,670,914	1,744,200	1.0
Used Merchandise Stores	1,606,303	780,277	0.5
Other Miscellaneous Store Retailers	10,342,802	15,709,402	1.5
Total Miscellaneous Store Retailers	15,716,357	20,683,774	1.3

Coupeville

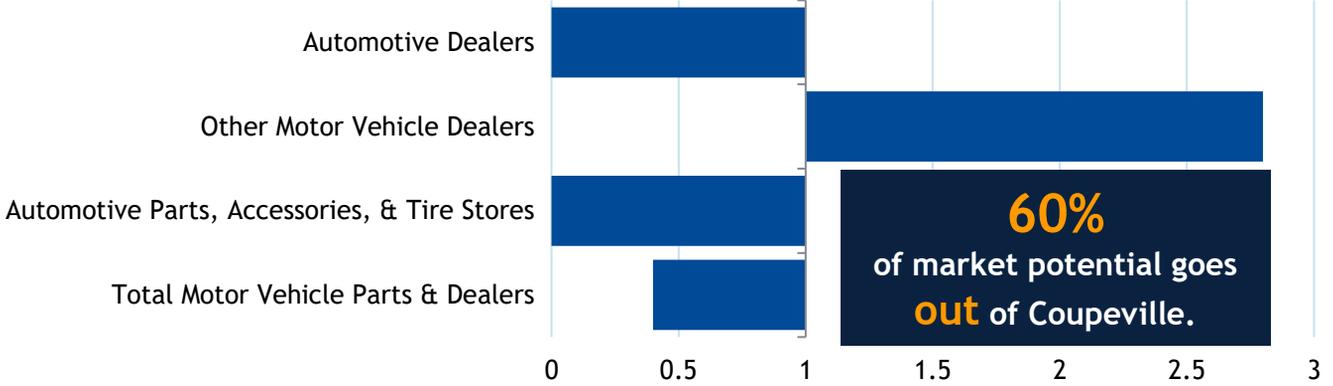
Leakage and Surplus



60%
of market
potential
goes **out**
of
Coupeville.

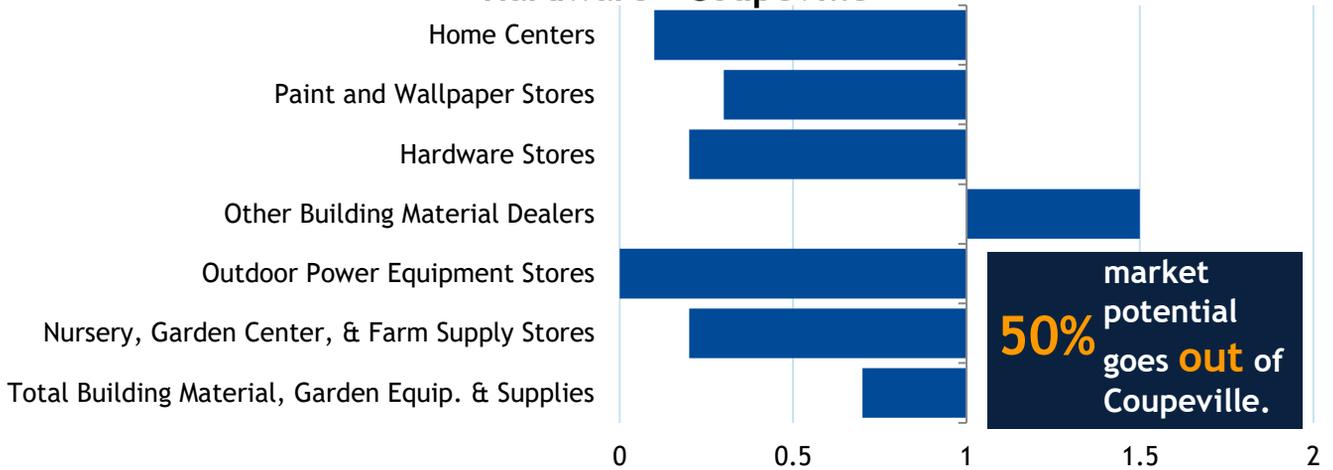
Store Type	Potential	Estimated	Surplus/ Leakage
Motor Vehicle Parts & Dealers	3,506,748	1,282,171	0.4
Furniture & Home Furnishing Stores	368,571	160,750	0.5
Electronics & Appliance Stores	272,099	148,683	0.5
Building Material, Garden Equip. & Supplies	1,203,947	545,505	0.5
Food & Beverage Stores	2,398,211	482,653	0.2
Health & Personal Care Stores	1,104,991	820,083	0.7
Clothing & Clothing Accessories Stores	604,683	68,407	0.1
Sporting Goods, Hobby, Book, & Music Stores	399,136	24,414	0.1
General Merchandise Stores	2,240,814	304,600	0.1
Miscellaneous Store Retailers	386,969	658,019	1.7
Foodservice & Drinking Places	1,973,805	1,702,857	0.9
Total	14,459,973	6,198,141	0.4

Vehicles - Coupeville



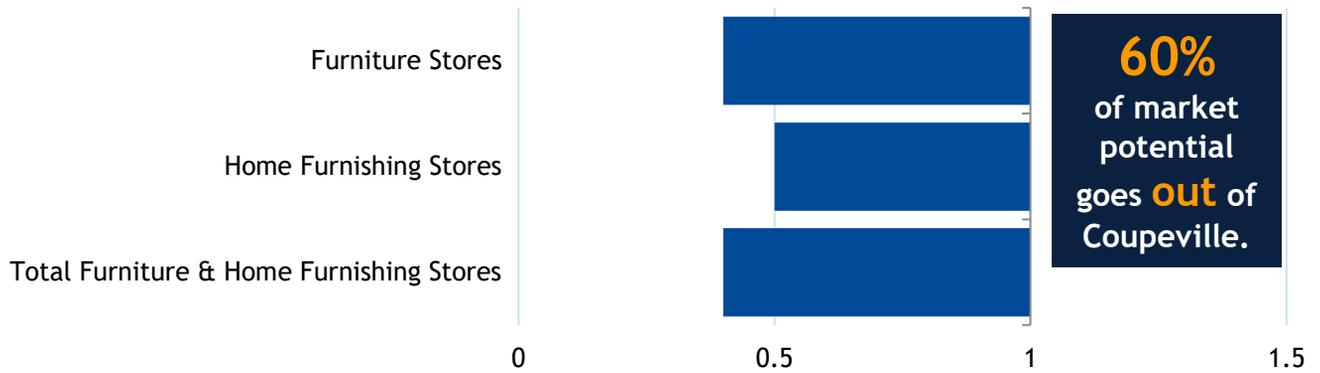
Store Type	Potential	Estimated	Surplus/Leakage
Automotive Dealers	2,772,013	78,258	0.0
Other Motor Vehicle Dealers	427,495	1,203,913	2.8
Automotive Parts, Accessories, & Tire Stores	307,240	0	0.0
Total Motor Vehicle Parts & Dealers	3,506,748	1,282,171	0.4

Hardware - Coupeville



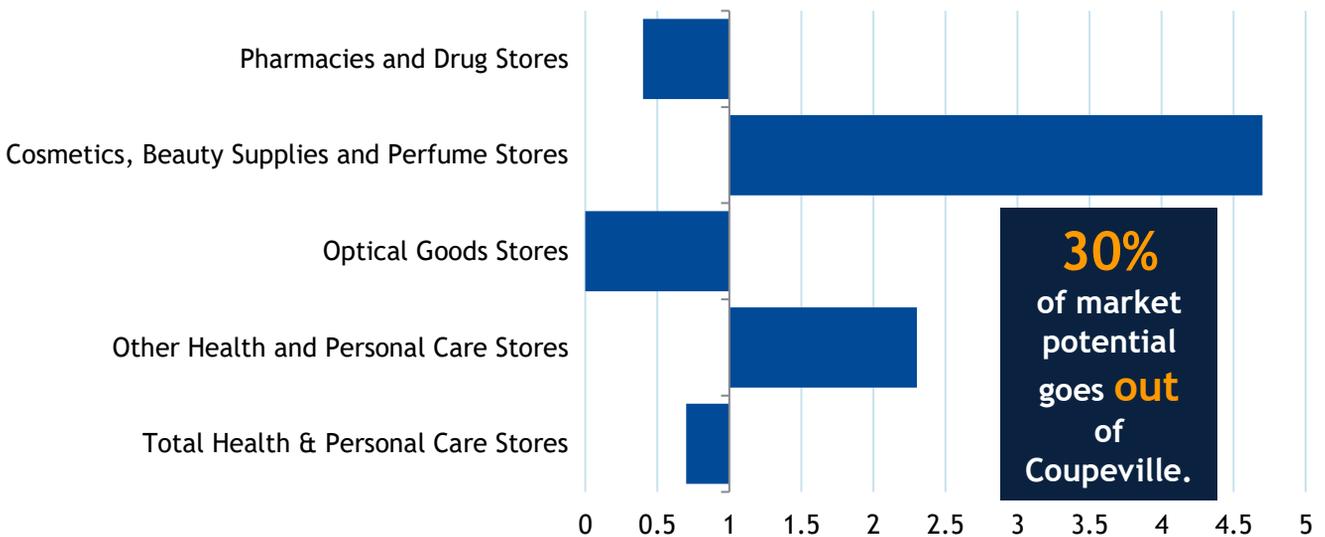
Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	599,493	30,039	0.1
Paint and Wallpaper Stores	31,729	9,864	0.3
Hardware Stores	82,466	13,177	0.2
Other Building Material Dealers	315,299	461,124	1.5
Outdoor Power Equipment Stores	35,950	0	0.0
Nursery, Garden Center, & Farm Supply Stores	139,010	31,300	0.2
Total Building Material, Garden Equip. & Supplies	1,203,947	545,505	0.5

Furniture - Coupeville



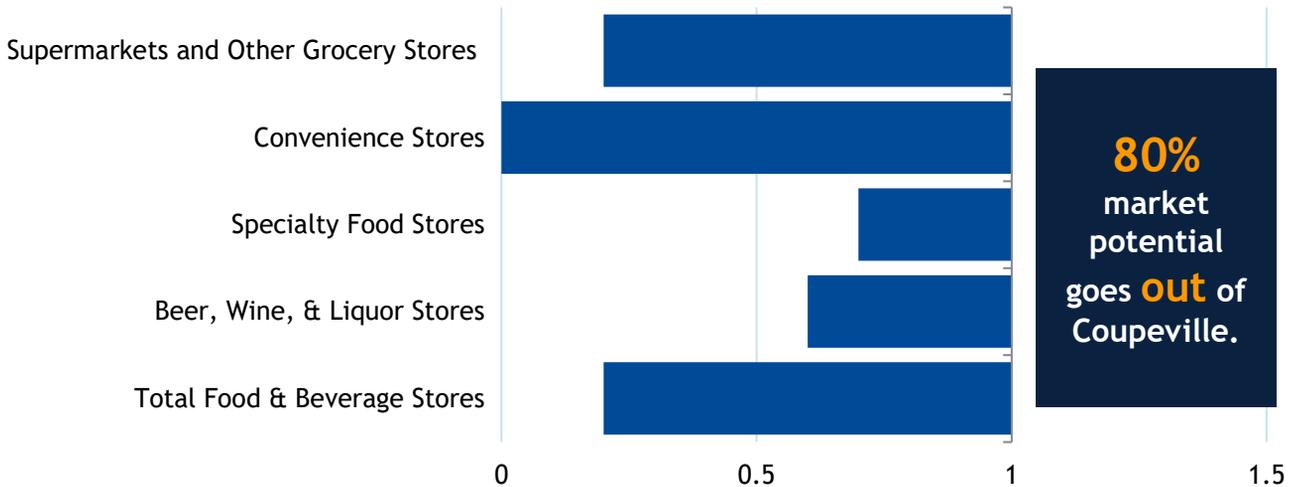
Store Type	Potential	Estimated	Surplus/Leakage
Furniture Stores	215,183	84,214	0.4
Home Furnishing Stores	153,388	76,536	0.5
Total Furniture & Home Furnishing Stores	368,571	160,750	0.4

Health - Coupeville



Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	938,234	354,700	0.4
Cosmetics, Beauty Supplies and Perfume Stores	70,923	334,098	4.7
Optical Goods Stores	39,615	0	0.0
Other Health and Personal Care Stores	56,219	131,285	2.3
Total Health & Personal Care Stores	1,104,991	820,083	0.7

Grocery - Coupeville



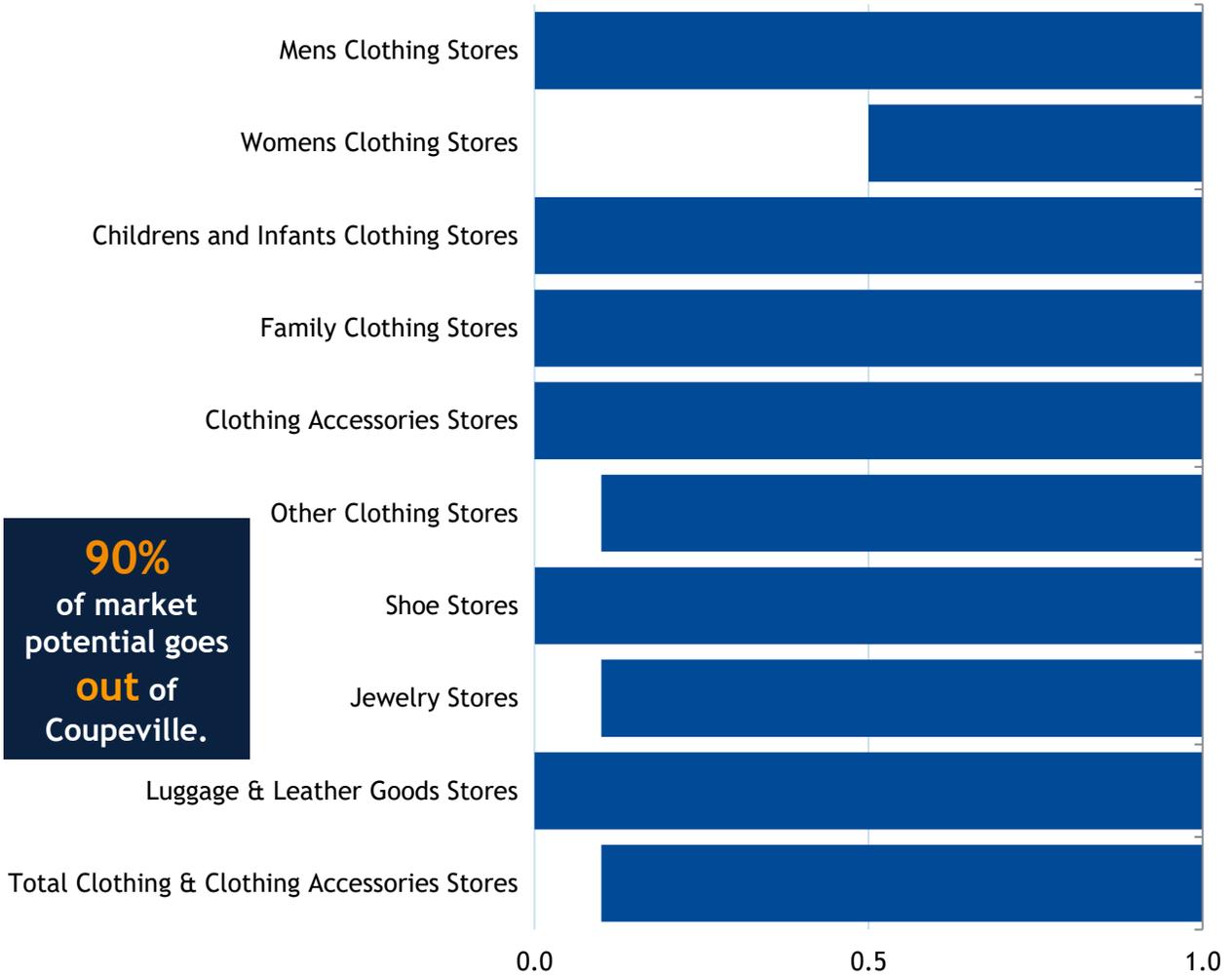
Store Type	Potential	Estimated	Surplus/Leakage
Supermarkets and Other Grocery Stores	2,070,571	327,359	0.2
Convenience Stores	83,163	0	0.0
Specialty Food Stores	66,130	47,865	0.7
Beer, Wine, & Liquor Stores	178,347	106,544	0.6
Total Food & Beverage Stores	2,398,211	482,653	0.2

Restaurants - Coupeville



Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	117,612	3,208	0.0
Drinking Places (Alcoholic Beverages)	66,463	17,509	0.3
Restaurants and Other Eating Places	1,789,729	1,682,140	0.9
Total Foodservice & Drinking Places	1,973,805	1,702,857	0.9

Clothing - Coupeville



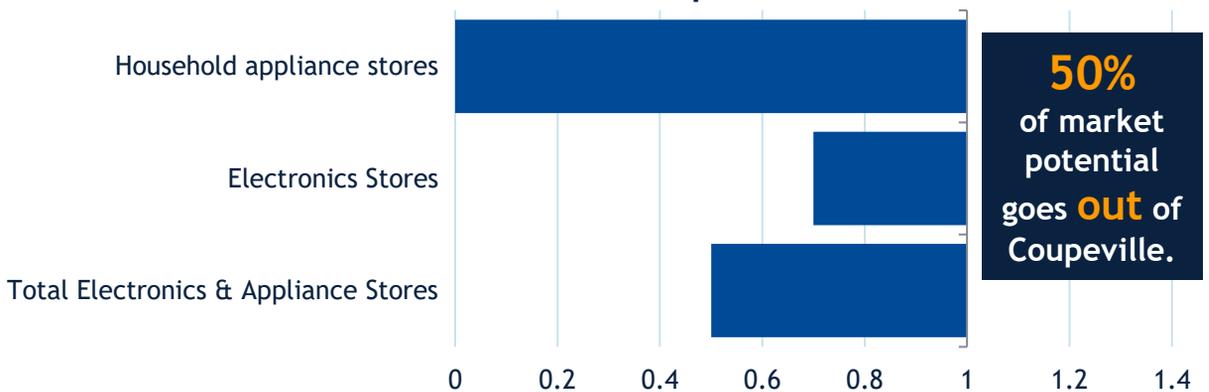
Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	13,558	0	0.0
Women's Clothing Stores	97,391	50,753	0.5
Children's and Infants' Clothing Stores	13,854	0	0.0
Family Clothing Stores	249,394	3,572	0.0
Clothing Accessories Stores	15,872	0	0.0
Other Clothing Stores	43,822	6,052	0.1
Shoe Stores	64,821	0	0.0
Jewelry Stores	102,039	7,997	0.1
Luggage & Leather Goods Stores	3,932	33	0.0
Total Clothing & Clothing Accessories Stores	604,683	68,407	0.1

Hobby - Coupeville



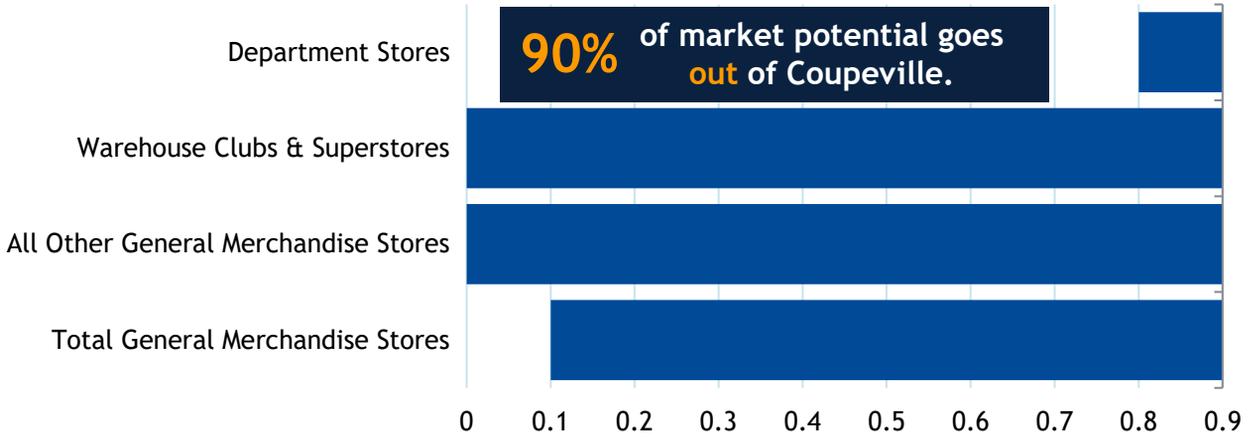
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	3,506,748	1,282,171	0.4
Hobby, Toy, and Game Stores	368,571	160,750	0.4
Sewing, Needlework, and Piece Goods Stores	272,099	148,683	0.5
Musical Instrument and Supplies Stores	1,203,947	545,505	0.5
Book Stores	2,398,211	482,653	0.2
News Dealers and Newsstands	1,104,991	820,083	0.7
Total Sporting Goods, Hobby, Book, & Music Stores	604,683	68,407	0.1

Electronics - Coupeville



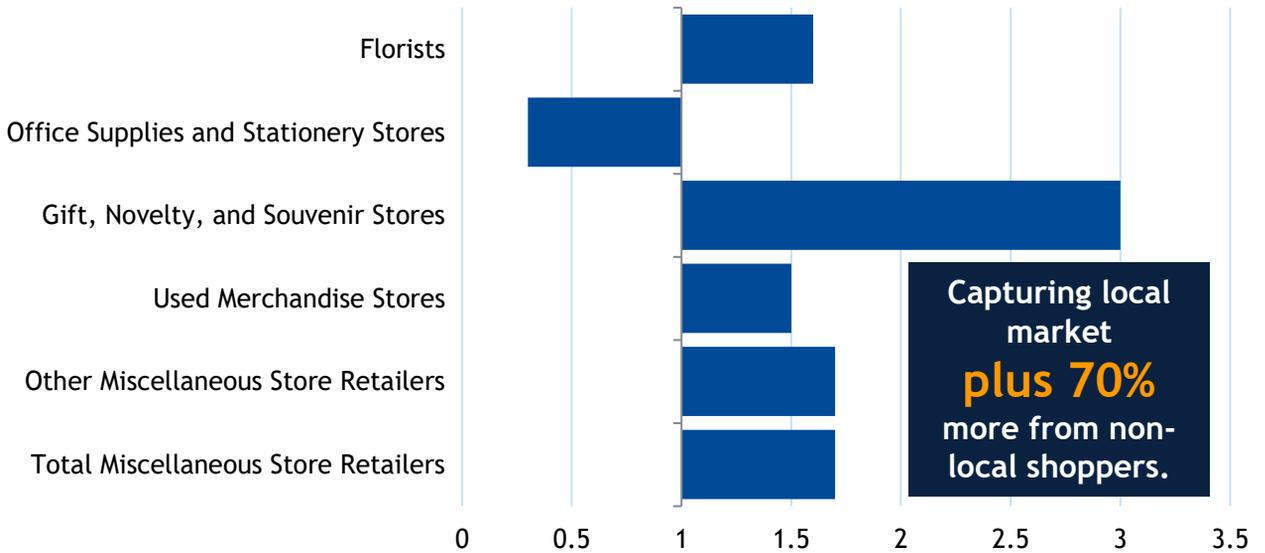
Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	57,926	12	0.0
Electronics Stores	214,172	148,672	0.7
Total Electronics & Appliance Stores	272,099	148,683	0.5

Department Stores - Coupeville



Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	353,660	295,065	0.8
Warehouse Clubs & Superstores	1,607,673	848	0.0
All Other General Merchandise Stores	279,480	8,688	0.0
Total General Merchandise Stores	2,240,814	304,600	0.1

Miscellaneous - Coupeville



Store Type	Potential	Estimated	Surplus/Leakage
Florists	18,213	28,283	1.6
Office Supplies and Stationery Stores	32,817	8,325	0.3
Gift, Novelty, and Souvenir Stores	38,924	116,699	3.0
Used Merchandise Stores	38,520	58,344	1.5
Other Miscellaneous Store Retailers	258,495	446,368	1.7
Total Miscellaneous Store Retailers	386,969	658,019	1.7

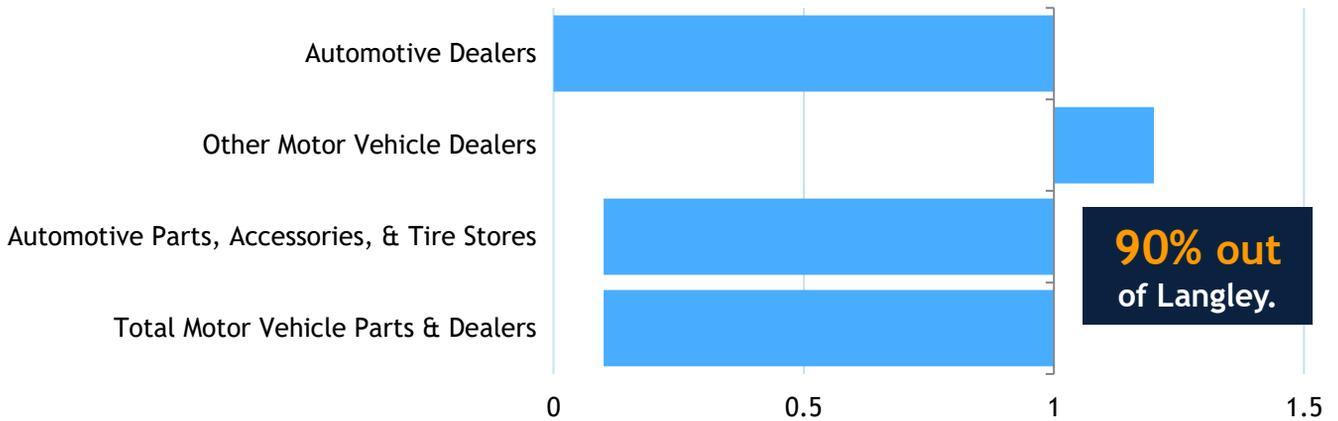
Leakage and Surplus



20%
of market
potential
goes **out** of
Langley.

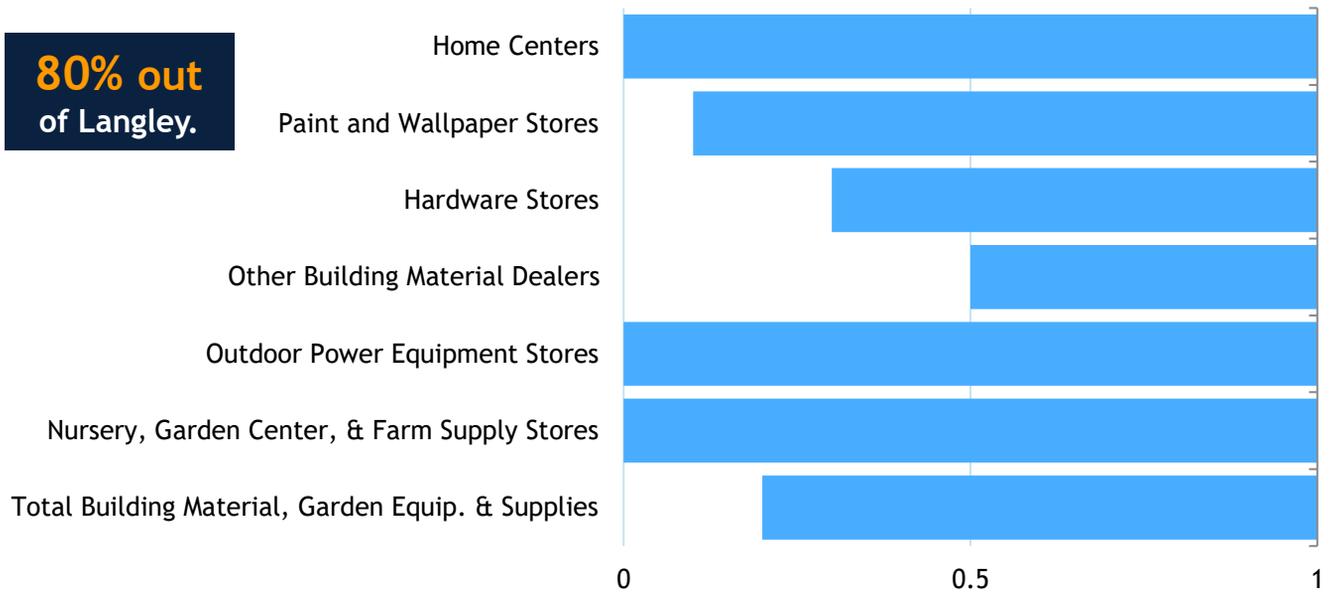
Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	2,797,356	405,035	0.1
Furniture & Home Furnishing Stores	291,082	170,350	0.6
Electronics & Appliance Stores	207,746	64,777	0.3
Building Material, Garden Equip. & Supplies	1,019,562	170,200	0.2
Food & Beverage Stores	1,959,485	3,926,857	2.0
Health & Personal Care Stores	974,135	824,049	0.8
Clothing & Clothing Accessories Stores	498,909	725,642	1.5
Sporting Goods, Hobby, Book, & Music Stores	272,419	133,886	0.5
General Merchandise Stores	1,809,360	7,716	0.0
Miscellaneous Store Retailers	324,633	1,833,472	5.6
Foodservice & Drinking Places	1,576,113	1,704,451	1.1
Total	11,730,799	9,966,435	0.8

Vehicles - Langley



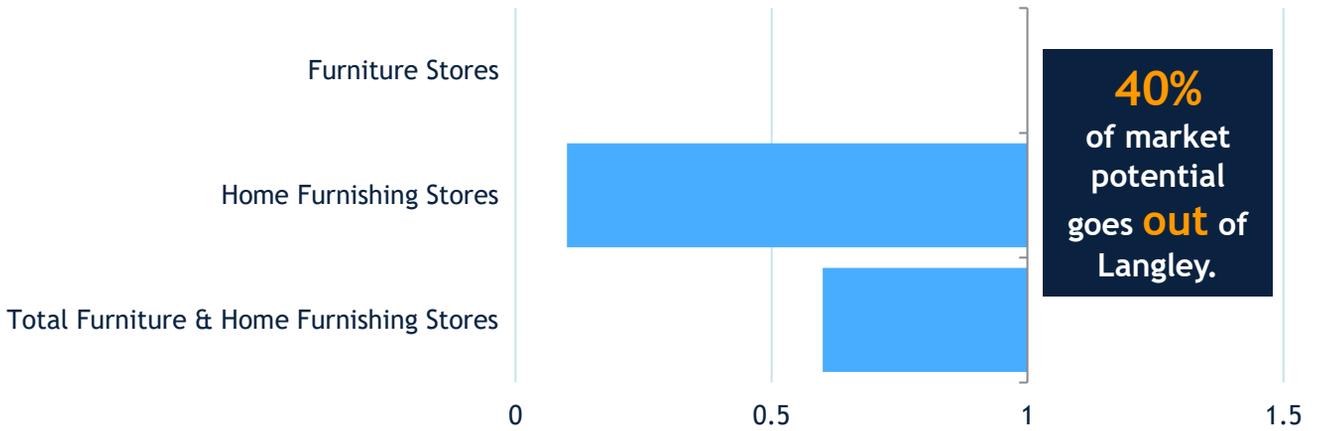
Store Type	Potential	Estimated	Surplus/Leakage
Automotive Dealers	2,230,886	6,016	0.0
Other Motor Vehicle Dealers	320,043	379,387	1.2
Automotive Parts, Accessories, & Tire Stores	246,428	19,632	0.1
Total Motor Vehicle Parts & Dealers	2,797,356	405,035	0.1

Hardware - Langley



Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	501,656	1,253	0.0
Paint and Wallpaper Stores	28,781	2,317	0.1
Hardware Stores	70,420	17,641	0.3
Other Building Material Dealers	272,683	146,633	0.5
Outdoor Power Equipment Stores	29,870	0	0.0
Nursery, Garden Center, & Farm Supply Stores	116,151	2,355	0.0
Total Building Material, Garden Equip. & Supplies	1,019,562	170,200	0.2

Furniture - Langley



Store Type	Potential	Estimated	Surplus/Leakage
Furniture Stores	166,880	160,310	1.0
Home Furnishing Stores	124,202	10,040	0.1
Total Furniture & Home Furnishing Stores	291,082	170,350	0.6

Health - Langley



Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	828,674	810,375	1.0
Cosmetics, Beauty Supplies and Perfume Stores	63,241	4,412	0.1
Optical Goods Stores	32,203	1,794	0.1
Other Health and Personal Care Stores	50,016	7,469	0.1
Total Health & Personal Care Stores	974,135	824,049	0.8

Grocery - Langley



Store Type	Potential	Estimated	Surplus/Leakage
Supermarkets and Other Grocery Stores	1,685,005	1,264,681	0.8
Convenience Stores	67,163	577	0.0
Specialty Food Stores	53,629	80,163	1.5
Beer, Wine, & Liquor Stores	153,687	2,581,436	16.8
Total Food & Beverage Stores	1,959,485	3,926,857	2.0

Restaurants - Langley



Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	73,652	2,543	0.0
Drinking Places (Alcoholic Beverages)	59,081	85,765	1.5
Restaurants and Other Eating Places	1,443,381	1,616,142	1.1
Total Foodservice & Drinking Places	1,576,113	1,704,451	1.1

Clothing - Langley



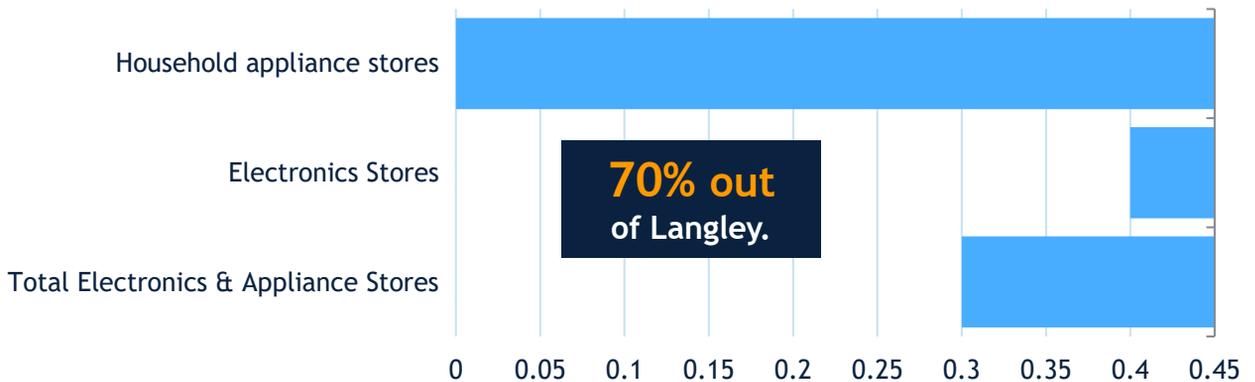
Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	11,063	67,548	6.1
Women's Clothing Stores	80,209	46,226	0.6
Children's and Infants' Clothing Stores	10,475	2,040	0.2
Family Clothing Stores	203,845	158,707	0.8
Clothing Accessories Stores	13,210	15,227	1.2
Other Clothing Stores	35,804	130,463	3.6
Shoe Stores	54,705	91,054	1.7
Jewelry Stores	86,324	210,052	2.4
Luggage & Leather Goods Stores	3,275	4,326	1.3
Total Clothing & Clothing Accessories Stores	498,909	725,642	1.5

Hobby - Langley



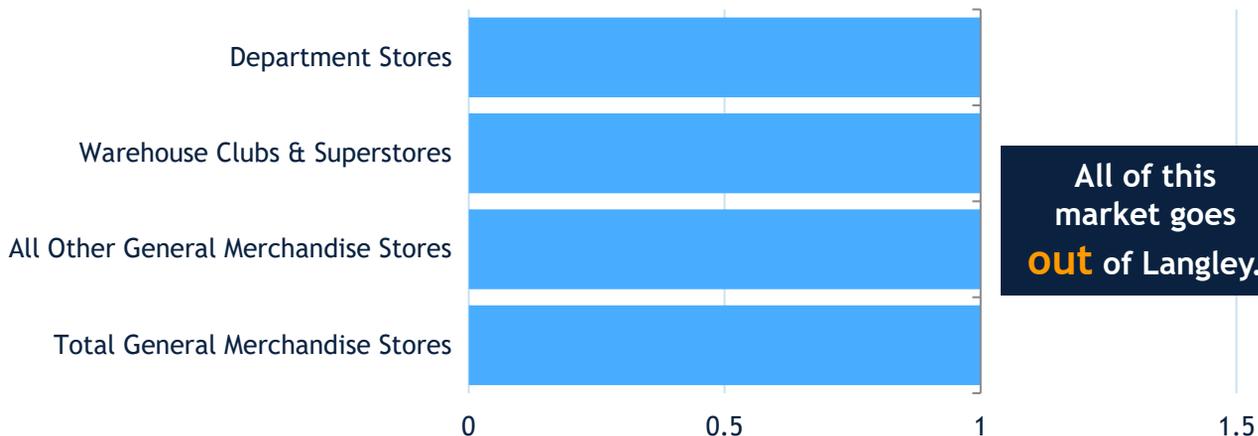
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	189,463	7,974	0.0
Hobby, Toy, and Game Stores	43,915	59,498	1.4
Sewing, Needlework, and Piece Goods Stores	7,700	51,391	6.7
Musical Instrument and Supplies Stores	5,202	14,082	2.7
Book Stores	16,386	854	0.1
News Dealers and Newsstands	9,753	87	0.0
Total Sporting Goods, Hobby, Book, & Music Stores	272,419	133,886	0.5

Electronics - Langley



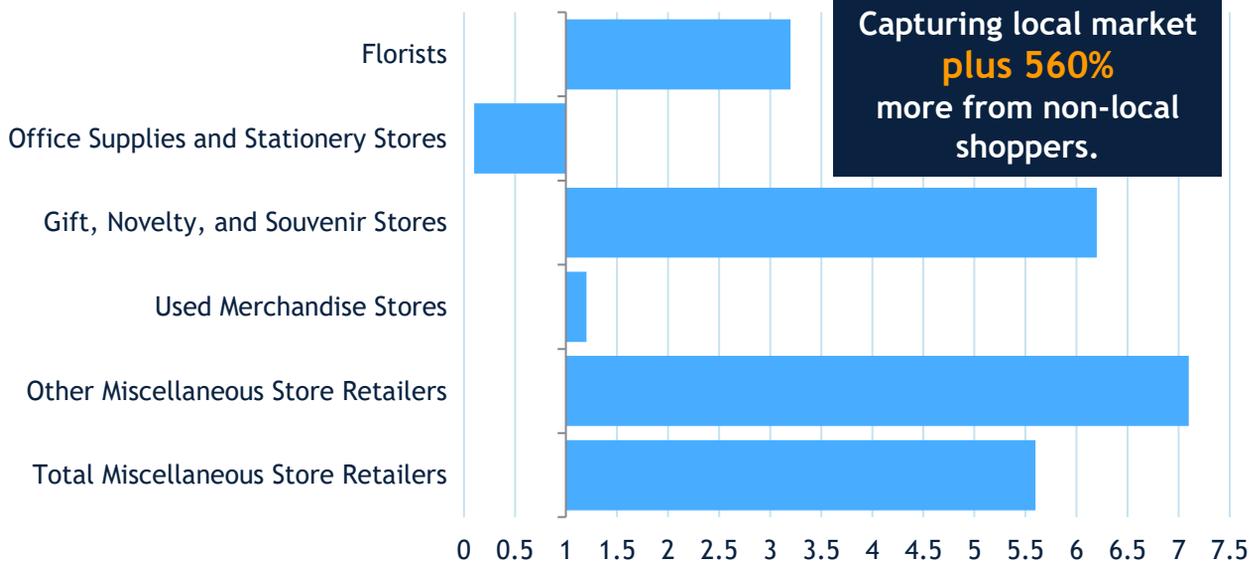
Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	46,010	245	0.0
Electronics Stores	161,735	64,532	0.4
Total Electronics & Appliance Stores	207,746	64,777	0.3

Department Stores - Langley



Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	289,092	171	0.0
Warehouse Clubs & Superstores	1,294,066	671	0.0
All Other General Merchandise Stores	226,202	6,874	0.0
Total General Merchandise Stores	1,809,360	7,716	0.0

Miscellaneous - Langley



Store Type	Potential	Estimated	Surplus/Leakage
Florists	15,241	48,390	3.2
Office Supplies and Stationery Stores	26,950	2,512	0.1
Gift, Novelty, and Souvenir Stores	32,031	198,615	6.2
Used Merchandise Stores	31,544	38,489	1.2
Other Miscellaneous Store Retailers	218,868	1,545,467	7.1
Total Miscellaneous Store Retailers	324,633	1,833,472	5.6

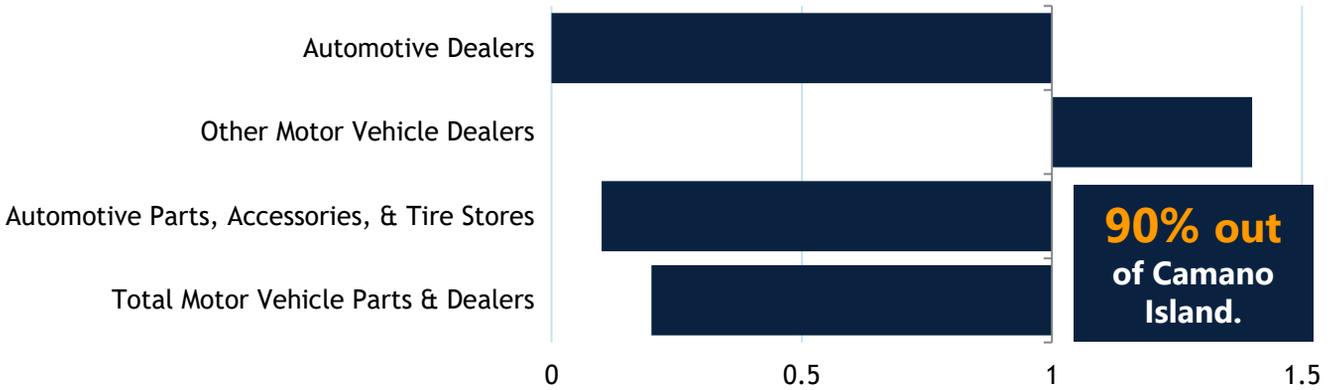
Camano Island

Leakage and Surplus



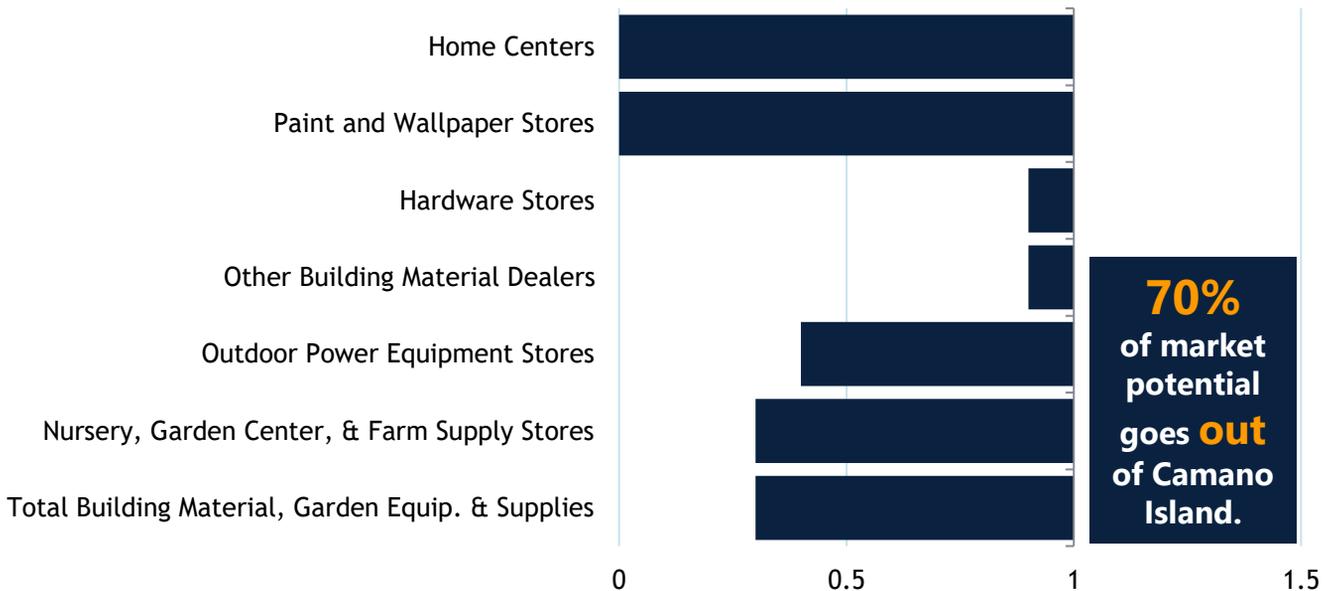
Store Type	Potential	Estimated	Surplus/Leakage
Motor Vehicle Parts & Dealers	47,595,033	10,797,189	0.2
Furniture & Home Furnishing Stores	5,250,104	1,315,392	0.3
Electronics & Appliance Stores	3,723,058	1,083,650	0.3
Building Material, Garden Equip. & Supplies	16,180,818	5,543,921	0.3
Food & Beverage Stores	30,472,141	15,410,450	0.5
Health & Personal Care Stores	14,295,059	758,221	0.1
Clothing & Clothing Accessories Stores	8,277,534	912,752	0.1
Sporting Goods, Hobby, Book, & Music Stores	5,882,905	1,166,193	0.2
General Merchandise Stores	29,230,762	5,415,040	0.2
Miscellaneous Store Retailers	4,969,504	2,376,283	0.5
Foodservice & Drinking Places	26,433,252	2,989,914	0.1
Total	192,310,170	47,769,005	0.2

Vehicles - Camano



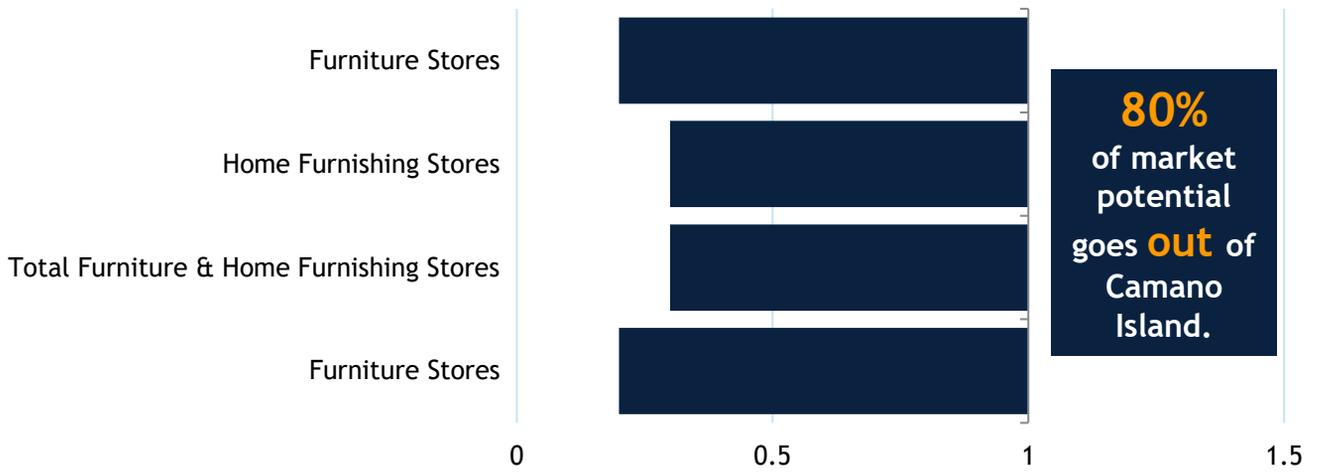
Store Type	Potential	Estimated	Surplus/Leakage
Automotive Dealers	37,232,166	1,027,163	0.0
Other Motor Vehicle Dealers	6,488,951	9,396,867	1.4
Automotive Parts, Accessories, & Tire Stores	3,873,916	373,159	0.1
Total Motor Vehicle Parts & Dealers	47,595,033	10,797,189	0.2

Hardware - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Home Centers	8,015,408	0	0.0
Paint and Wallpaper Stores	439,107	0	0.0
Hardware Stores	1,119,391	959,365	0.9
Other Building Material Dealers	4,208,930	3,848,891	0.9
Outdoor Power Equipment Stores	497,510	182,834	0.4
Nursery, Garden Center, & Farm Supply Stores	1,900,473	552,830	0.3
Total Building Material, Garden Equip. & Supplies	16,180,818	5,543,921	0.3

Furniture - Camano



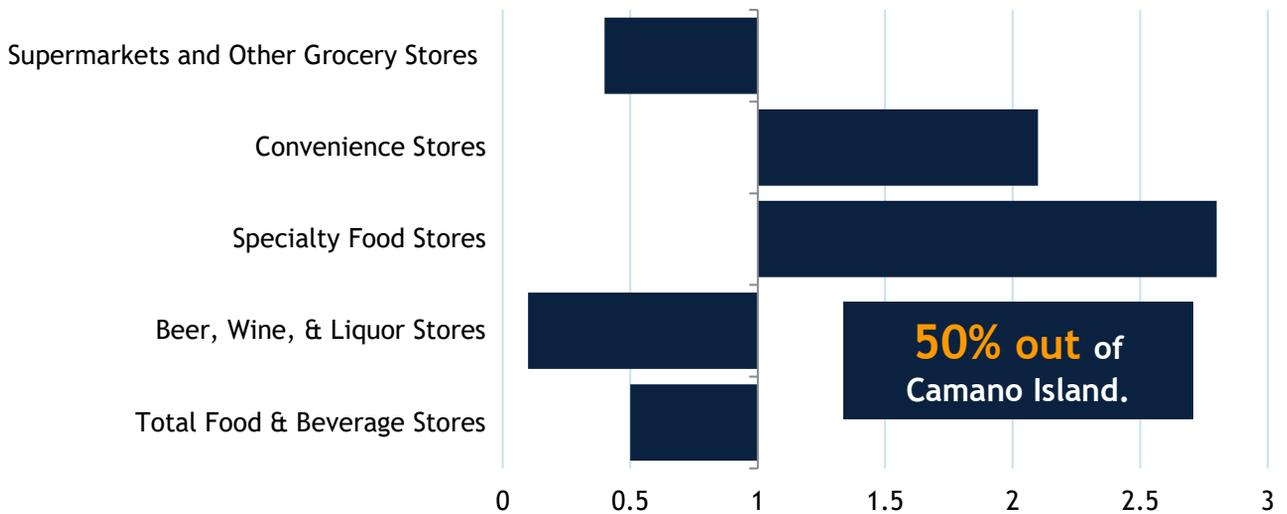
Store Type	Potential	Estimated	Surplus/Leakage
Furniture Stores	3,141,176	774,396	0.2
Home Furnishing Stores	2,108,927	540,996	0.3
Total Furniture & Home Furnishing Stores	5,250,104	1,315,392	0.3
Furniture Stores	3,141,176	774,396	0.2

Health - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Pharmacies and Drug Stores	12,113,123	445,248	0.0
Cosmetics, Beauty Supplies and Perfume Stores	920,990	259,158	0.3
Optical Goods Stores	531,302	0	0.0
Other Health and Personal Care Stores	729,644	53,815	0.1
Total Health & Personal Care Stores	14,295,059	758,221	0.1

Grocery - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Supermarkets and Other Grocery Stores	26,254,472	10,738,019	0.4
Convenience Stores	1,048,094	2,204,999	2.1
Specialty Food Stores	838,556	2,327,499	2.8
Beer, Wine, & Liquor Stores	2,331,019	139,933	0.1
Total Food & Beverage Stores	30,472,141	15,410,450	0.5

Restaurants - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Special Food Services	1,615,879	118,221	0.1
Drinking Places (Alcoholic Beverages)	905,049	759,921	0.8
Restaurants and Other Eating Places	23,912,324	2,111,772	0.1
Total Foodservice & Drinking Places	26,433,252	2,989,914	0.1

Clothing - Camano



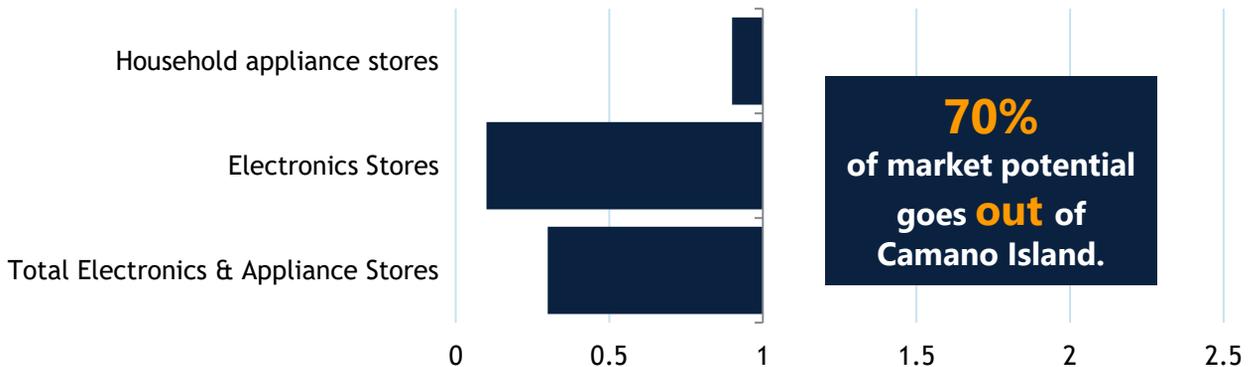
Store Type	Potential	Estimated	Surplus/Leakage
Men's Clothing Stores	176,301	0	0.0
Women's Clothing Stores	1,307,080	71,595	0.1
Children's and Infants' Clothing Stores	199,977	0	0.0
Family Clothing Stores	3,375,940	266,744	0.1
Clothing Accessories Stores	223,402	0	0.0
Other Clothing Stores	584,689	1,728	0.0
Shoe Stores	836,202	0	0.0
Jewelry Stores	1,521,060	568,691	0.4
Luggage & Leather Goods Stores	52,884	3,995	0.1
Total Clothing & Clothing Accessories Stores	8,277,534	912,752	0.1

Hobby - Camano



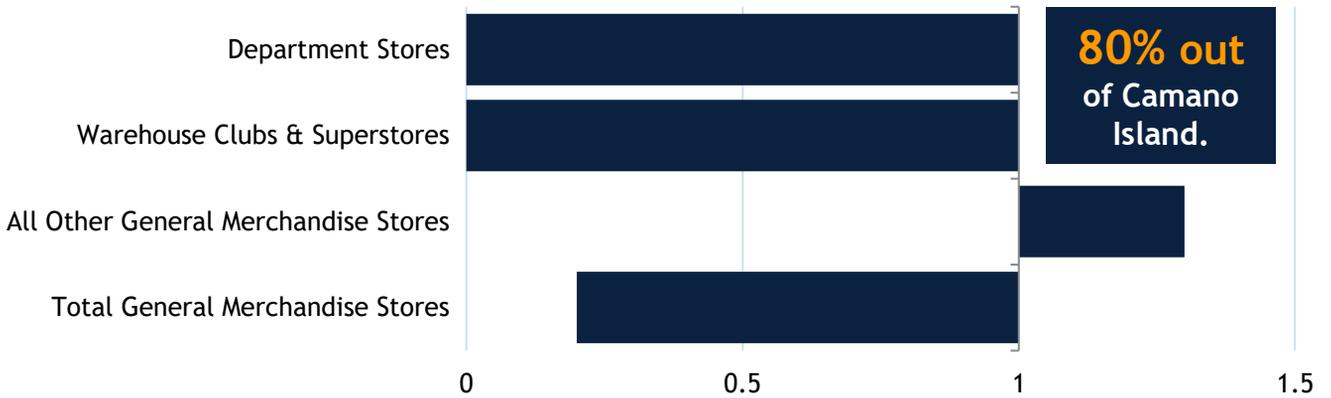
Store Type	Potential	Estimated	Surplus/Leakage
Sporting Goods Stores	4,538,122	562,991	0.1
Hobby, Toy, and Game Stores	712,710	380,607	0.5
Sewing, Needlework, and Piece Goods Stores	115,642	87,807	0.8
Musical Instrument and Supplies Stores	98,640	41,011	0.4
Book Stores	262,470	93,777	0.4
News Dealers and Newsstands	155,320	0	0.0
Total Sporting Goods, Hobby, Book, & Music Stores	5,882,905	1,166,193	0.2

Electronics - Camano



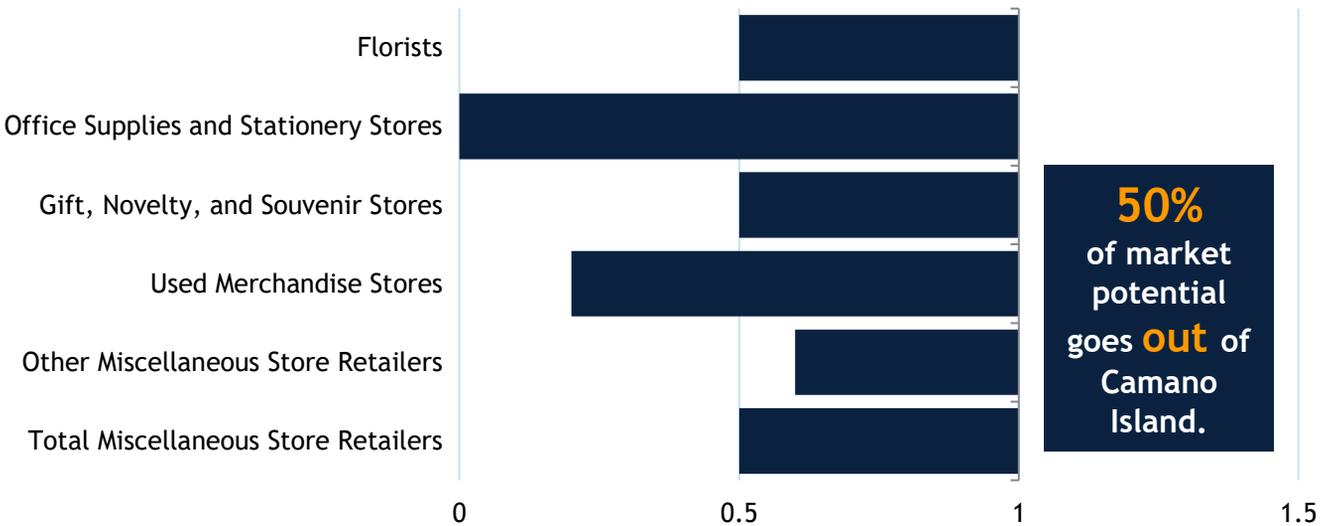
Store Type	Potential	Estimated	Surplus/Leakage
Household appliance stores	793,072	679,958	0.9
Electronics Stores	2,929,987	403,691	0.1
Total Electronics & Appliance Stores	3,723,058	1,083,650	0.3

General Merchandise - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Department Stores	4,825,065	61,780	0.0
Warehouse Clubs & Superstores	20,772,586	475,077	0.0
All Other General Merchandise Stores	3,633,111	4,878,183	1.3
Total General Merchandise Stores	29,230,762	5,415,040	0.2

Miscellaneous - Camano



Store Type	Potential	Estimated	Surplus/Leakage
Florists	252,343	118,782	0.5
Office Supplies and Stationery Stores	445,158	0	0.0
Gift, Novelty, and Souvenir Stores	510,841	242,373	0.5
Used Merchandise Stores	492,928	96,871	0.2
Other Miscellaneous Store Retailers	3,268,234	1,918,257	0.6
Total Miscellaneous Store Retailers	4,969,504	2,376,283	0.5

Resources

Sources and Methodology

The data in this report comes from **the Buxton program database**. The primary data sources used in the construction of the database include:

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

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

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

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

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



info@edcislandcounty.org
www.iscoedc.com
(360) 678-6889

The Economic Development Council for Island County (EDC) is a 501(c)6 non-profit dedicated to:

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

Join us! By becoming a member or sponsor of the EDC you will help support economic vitality in Island County.