

CITY OF ENUMCLAW

Economic Analysis

Retail Assessment and
Comparative Advantages

October 2012

Prepared for:



Prepared by:





*Community Attributes tells data rich stories about communities
that are important to decision-makers.*

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INTRODUCTION

Background and Purpose

The City of Enumclaw seeks to frame decision-making for economic development with economic analysis providing a common understanding of opportunities for local businesses. This report frames retail, demographic, emerging entrepreneurial and employment opportunities for Enumclaw.

Methods

The methods used in this analysis integrate regional and long-term market demand assessment. Two key questions addressed through this analysis are: “How much retail makes sense for this area?”, and “For the kind of retail we envision, what geographic area does that retail need to serve and draw from?”

Assessment of retail and potential retail growth include establishment and analysis of the Primary Trade Area for the City of Enumclaw. In addition, assessments of overall spending within the Primary Trade Area utilizing consumer buying power data and trade capture ratios based on taxable retail sales are provided.

In addition, sub-regional assessments of Enumclaw’s comparative advantages for strong and emerging industries in the regional economy are provided. This includes comparisons to regional employment trends. Also provided is a demographic and economic profile of the City framed alongside demographic and economic data for comparable cities.

Organization of this Report

- **Findings.** A summary of key findings from the retail assessment, demographic analysis and industry profile.
- **Retail Assessment and Trade Capture Analysis.** Establishment and analysis of the City’s Primary Trade Area along with a description and analysis of taxable retail sales, consumer buying power and trade capture within the Primary Trade Area.
- **Comparative Advantages.** A demographic profile of Enumclaw and comparison cities, including analysis of income, growth, housing, and employment.
- **Industry Profile.** Assessments of regional and local employment including analysis of key employers and employee commuting patterns.
- **Potential Strategies.** A summary and cursory analysis of potential economic development strategies for the City of Enumclaw to consider.

FINDINGS

Retail Assessment

- Enumclaw's Primary Trade Area had 22,505 residents in 2010, approximately twice the population of Enumclaw. No major clusters of retail exist within the Primary Trade Area outside of the City of Enumclaw. Several major retail centers with existing large format discount retailers are located within Enumclaw's Secondary Trade Area.
- Within Enumclaw's Primary Trade Area (see **Exhibit 1**), retailers in the city capture 40% of all spending within the Primary Trade Area.
- The amount of disposable income or consumer buying power within the Enumclaw Primary Trade Area is higher than that of the rest of Washington State on a per household basis. Within the Enumclaw Primary Trade Area per household annual consumer buying power is \$71,000 compared to \$53,000 for the entire state (in 2011 dollars).
- Retail categories with relatively higher trade capture rates are Drug and Health Stores at 96% and Food and Beverage Stores at 76%.
- Categories that show room for growth in trade capture within the Primary Trade Area are Furniture and Appliance (29%), Apparel and Accessories (27%), Sporting Goods, Toys, Book and Music Stores (19%), and General Merchandise Stores (18%).
- Motor Vehicle Sales and Parts, analyzed separately, are captured at 166%, the strongest retail category in terms of trade capture within the Primary Trade Area.
- Forecasted population growth within the Primary Trade Area will support 120,000 square feet of new retail in Enumclaw over the next 30 years, if the city maintains the same trade capture rate of spending within its Primary Trade Area (40%).
- Attracting more than 120,000 s.f. will require increases in local trade capture.
 - 120,000 s.f. is roughly the equivalent of one large big box retailer and several boutique retailers and restaurants.
- A net gain of 250,000 s.f., as an alternative scenario, would require shifting the City's trade capture rate from 40% to 47%.
 - Moving to 47%, as an example, would require that for every \$60 a trade area household spends outside of Enumclaw today, that household would start spending \$7 more in Enumclaw and only \$53 outside of Enumclaw.

Demographics and Comparative Advantages

- Enumclaw's 2010 jobs-to-housing ratio was 0.91, relatively unchanged from the year 2000 when the ratio was 0.94. The jobs-to-housing ratio indicates that Enumclaw has a balanced mix of housing and employment.
- Several Comparison Cities have experienced substantial shifts in jobs-to-housing ratios from 2000 to 2010, where growth in housing has outpaced

growth in employment. Enumclaw's ratio has remained relatively unchanged over the same period.

- All Comparison Cities experienced greater population growth from 2000 to 2010 than the City of Enumclaw, with Enumclaw's population declining slightly during that time period.
- Enumclaw is less ethnically diverse than most Comparison Cities and the region as a whole, with a smaller percentage of foreign born residents and smaller percentage (12%) of non-white residents.

Industry Profile

- The Services sector is largest employment sector in Enumclaw, accounting for 38% of all employment in Enumclaw in 2011. Retail accounted for 16% of overall employment while Finance, Insurance and Real Estate accounted for 13% of total employment.
- The fastest growing employment sectors from 2000 to 2011 in Enumclaw were Services at 1.8% (CAGR), Government at 2.0% (CAGR) and Manufacturing at 3.2% (CAGR).
- Among people working in Enumclaw, 55% live in the Enumclaw Plateau (**Exhibit 33**) while 16% of Enumclaw employees commute from the Tacoma/Federal Way Area and 13% commute from the Kent/Renton/SeaTac Area. Only 4% commute from the Seattle/Bellevue/Everett area.
- A quarter (26%) of all workers that live within Enumclaw work within Enumclaw and the surrounding Enumclaw Plateau (**Exhibit 35**). Locations that Enumclaw residents commute to include the Kent/Renton/SeaTac Area (24%), Tacoma/Federal Way (15%) and Seattle/Bellevue/Everett (26%).
- Two of the largest employers in Enumclaw are within the Insurance and Healthcare industries, employing upwards of 700 people in 2012.

RETAIL ASSESSMENT

To determine how much neighborhood-serving retail (defined by square footage) makes sense to plan for Enumclaw the following has been completed:

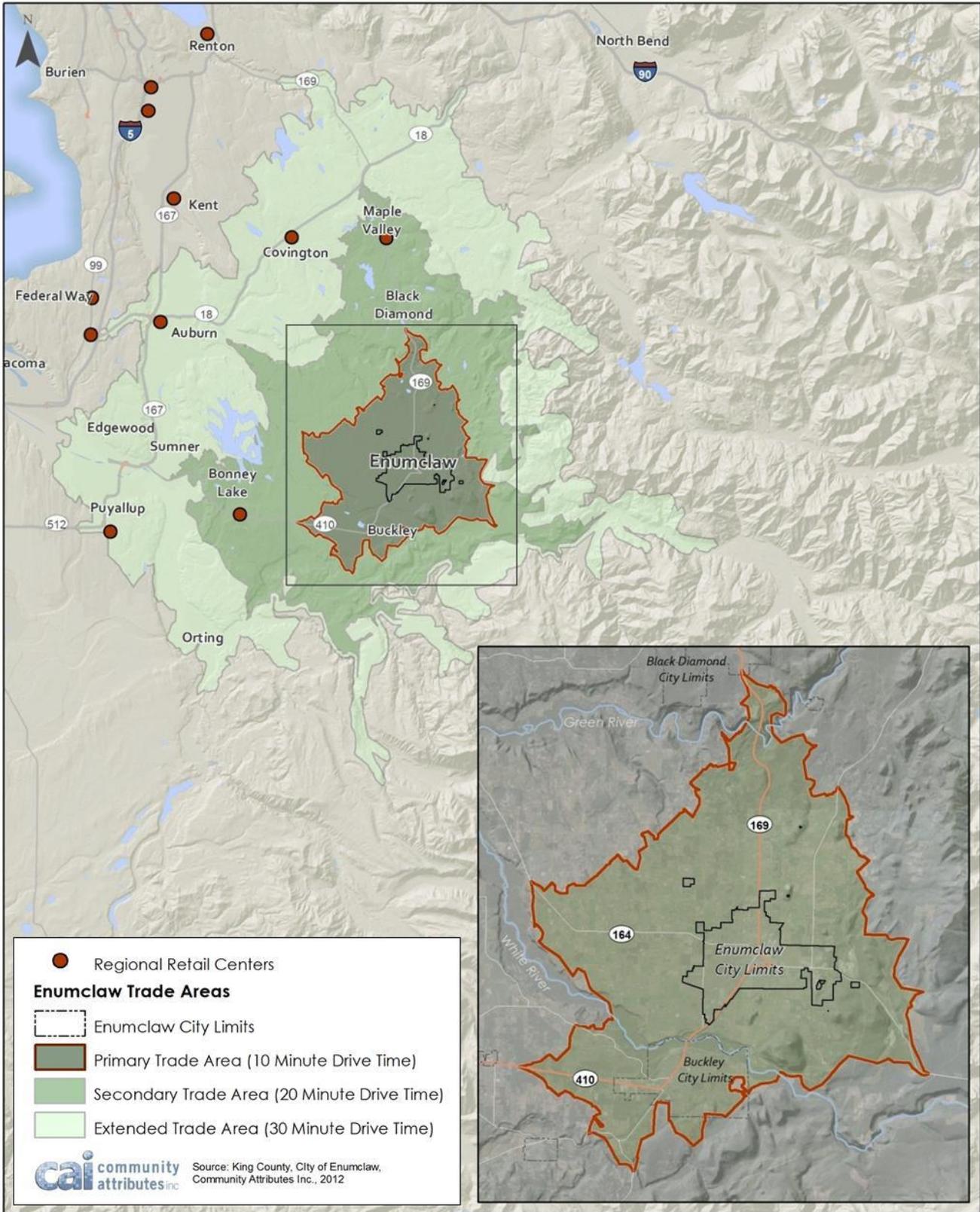
- Definition of the Enumclaw trade area (where consumers come from)
- Assessment of local spending power to determine potential consumer demand for products and services;
- Assessment of total taxable retail sales, taxable retail sales growth and taxable retail sales per capita.
- Identification of various trade capture scenarios (trade capture scenarios show the amount of retail spending captured by the neighborhood now and that could be captured by new neighborhood-serving retail square footage)

Trade Area

The first step in assessing Enumclaw retail is defining the primary trade area. It represents the area from which it would be reasonable to expect consumers to travel in order to shop in the City of Enumclaw. In other words, the Primary Trade Area represents an estimate of the geographic area from which approximately 2/3 of a retailer's customers would come. **Exhibit 1** illustrates the Enumclaw Primary Trade Area established for this analysis. In addition, secondary and extended trade areas are highlighted.

The study area for the retail assessment and trade area analysis encompasses all areas within a half hour drive of Enumclaw. Trade areas are determined by drive times of 10 minutes, 20 minutes and 30 minutes. The Primary Trade Area follows the 10 minute drive time from the City of Enumclaw. Existing retail centers within the study area are also identified

Exhibit 1. Enumclaw Trade Areas, 2012



Exhibits 2 and 3 illustrate the household density and spending power of Enumclaw and surrounding areas within the context of the Primary Trade Area boundaries. The Primary Trade Area has a population of 22,205 with 8,769 households (2010). No other concentrations of aggregate spending power or households exist within the Primary Trade Area beyond the City of Enumclaw boundaries. In addition, no other regional retail centers are located within the Primary Trade Area, while two, Maple Valley and Bonney Lake, are located within the Secondary Trade Area (20 minute drive time).

Exhibit 2. Primary and Secondary Trade Area Attributes, 2010

Primary Trade Area	Primary Trade Area	Secondary Trade Area (cumulative)
Population	22,505	78,494
Housing Units	9,257	28,323
Households	8,769	26,851
Area (sq mi)	52	138
Population Per Sq Mi	433	569
Forecasted 2030 Population	26,900	N/A
2010-2030 Forecasted CAGR	0.90%	N/A

Source: Puget Sound Regional Council, 2012., Community Attributes, Inc., 2012.

Exhibit 3. Income and Household Density, Enumclaw Trade Areas, 2010

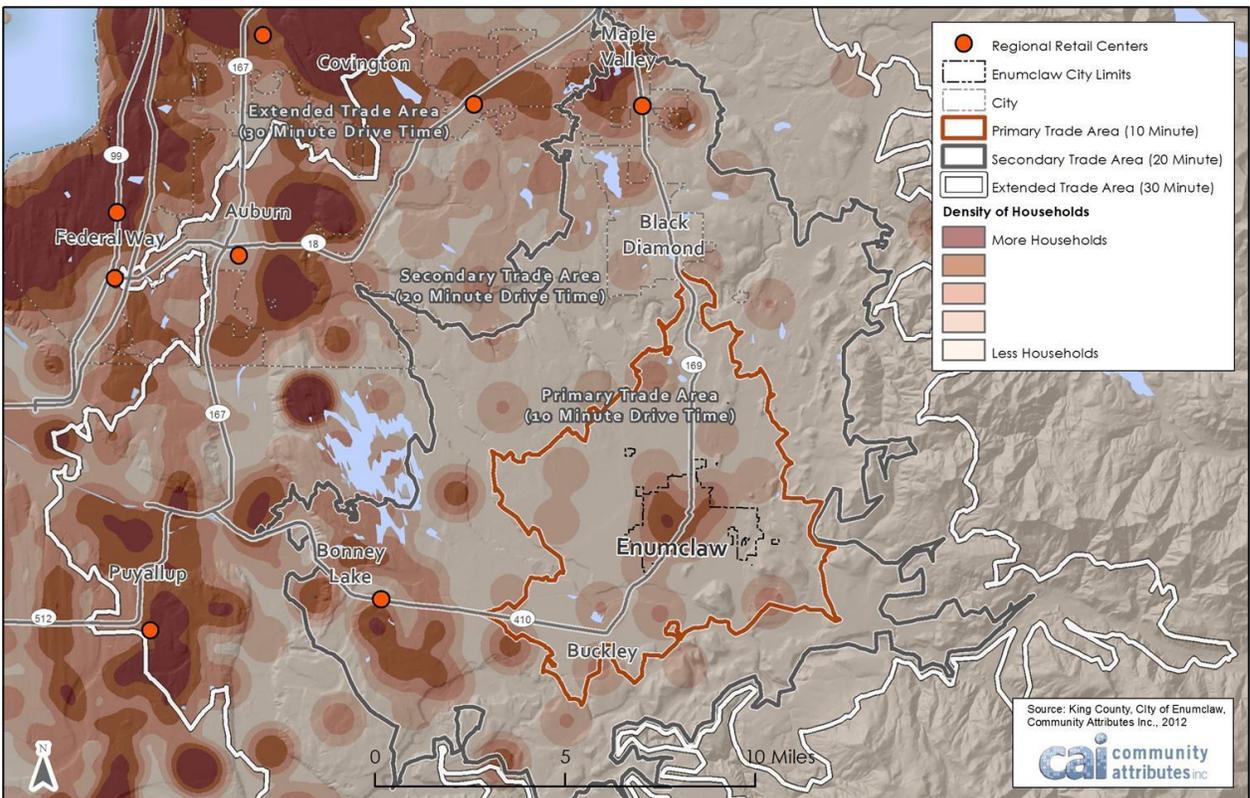
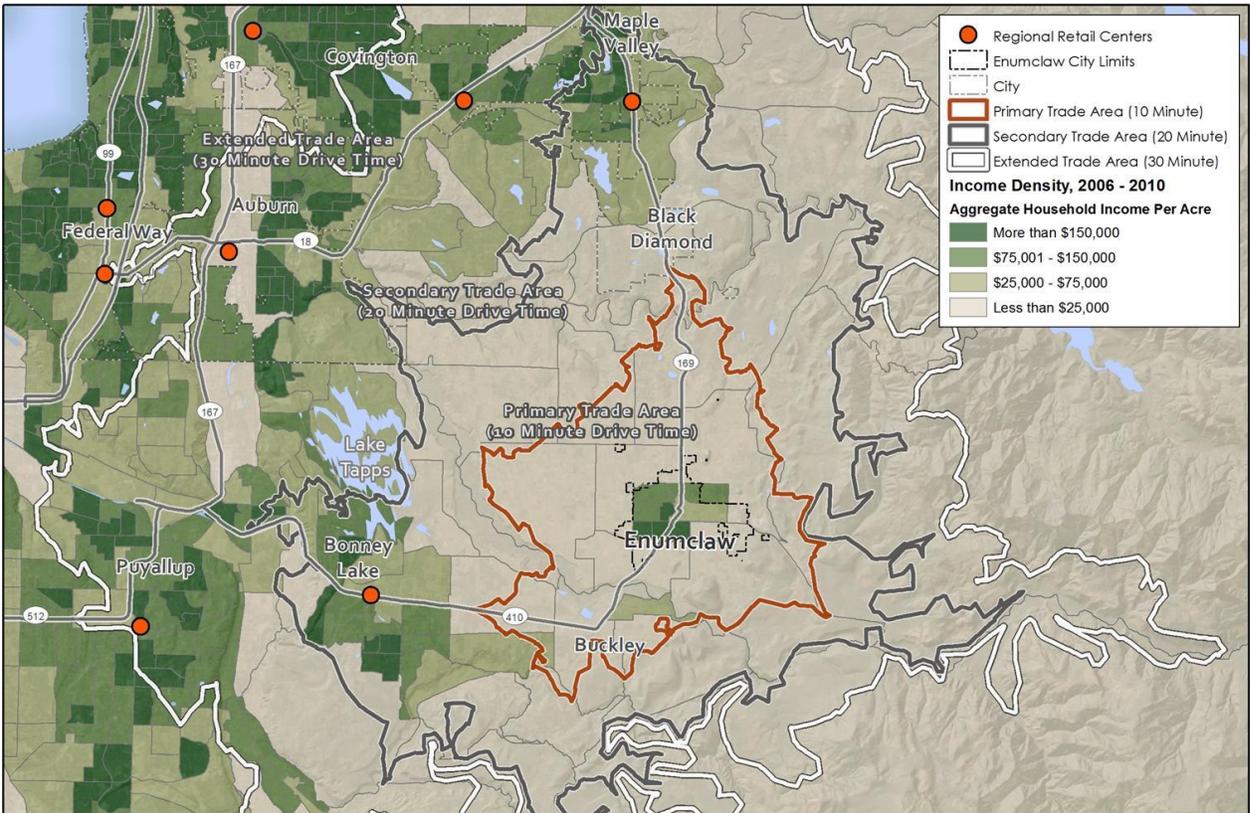
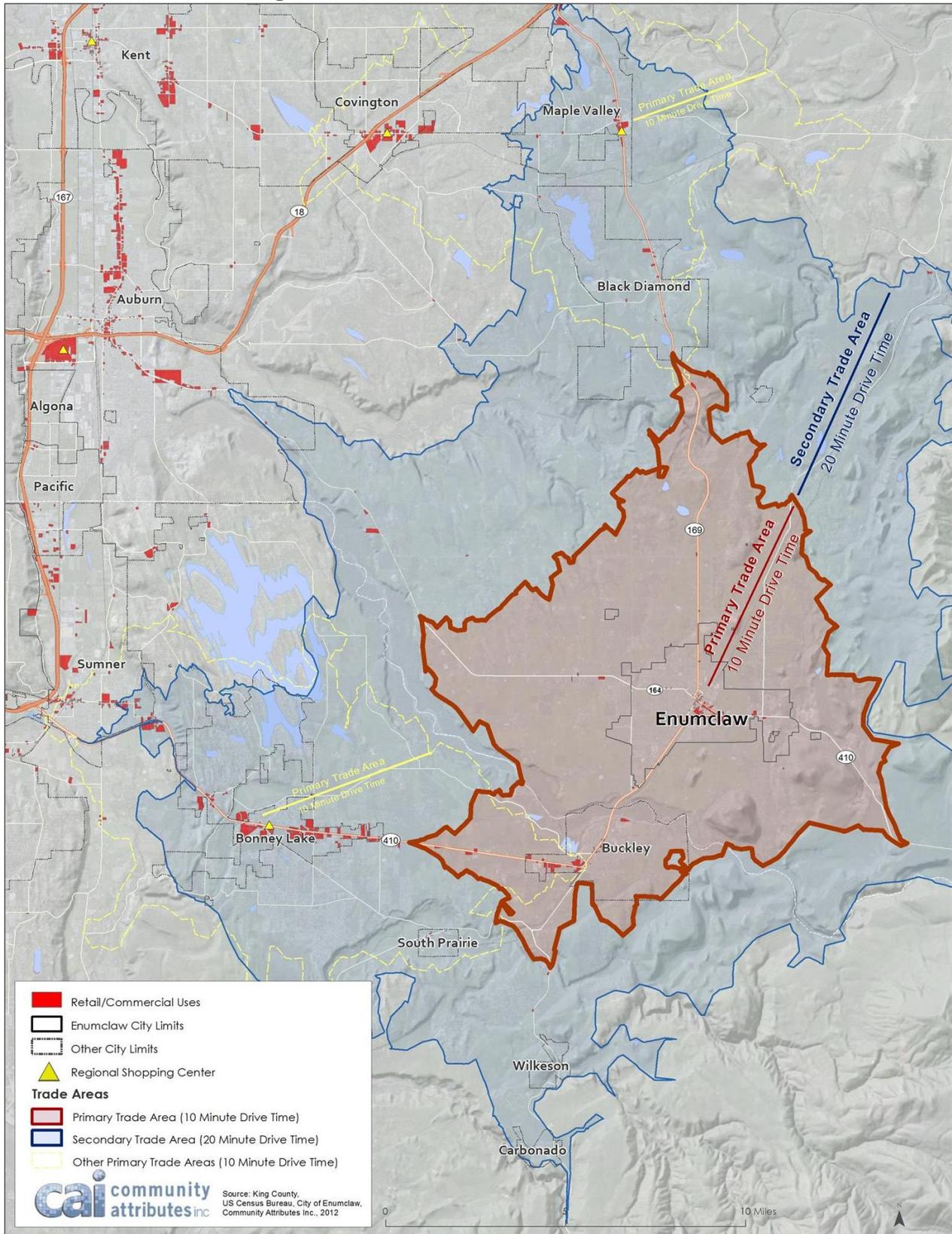


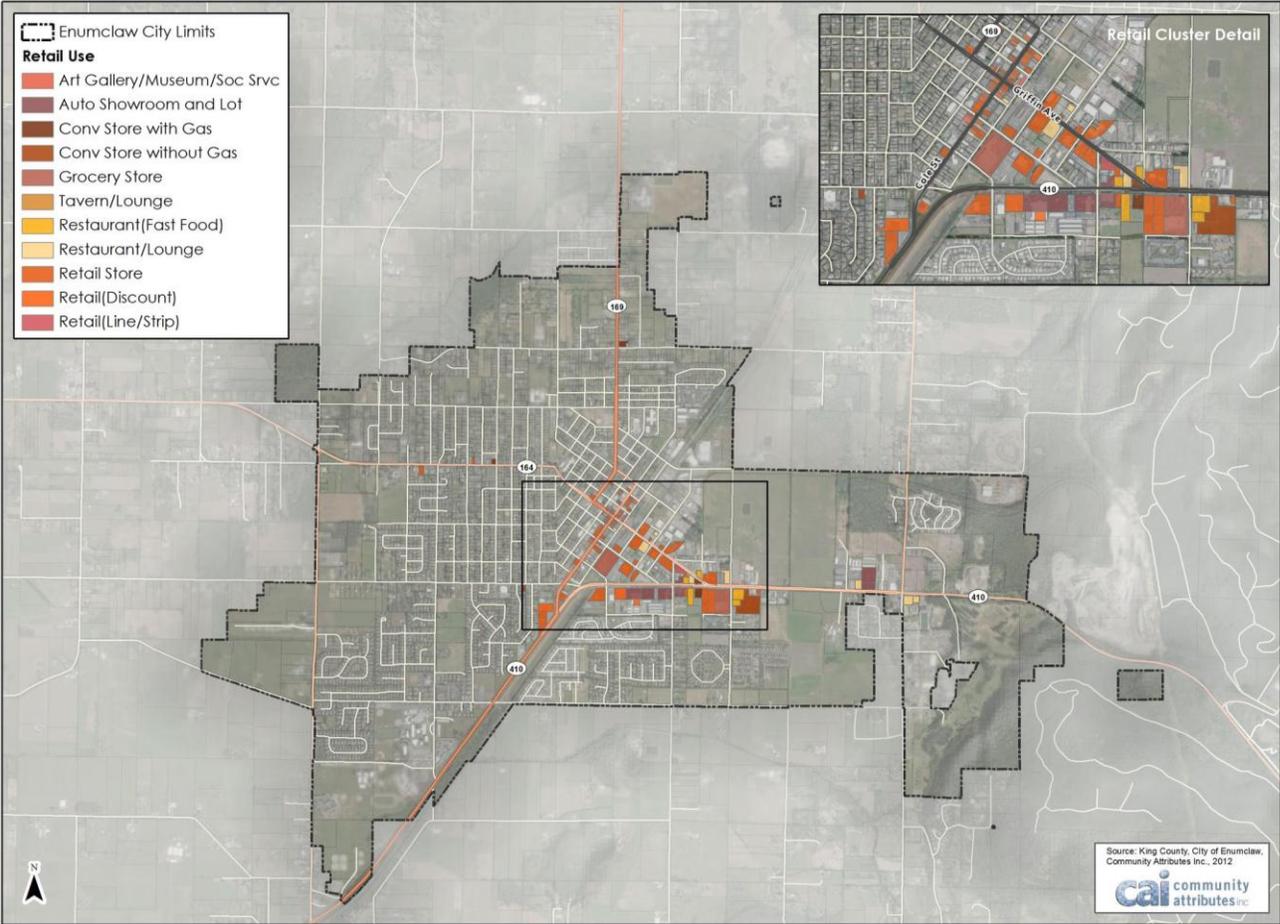
Exhibit 4 illustrates the location of existing retail uses within the Primary, Secondary and Extended Trades Areas of the City of Enumclaw. Within the Primary Trade Area retail clusters exist within Enumclaw and Buckley. Several retail clusters exist within the Secondary Trade Area including clusters in Maple Valley, Bonney Lake, and Sumner. The yellow lines represent primary trade areas for Maple Valley and Bonney Lake. The Bonney Lake primary trade area overlaps the Enumclaw primary trade area in and around Buckley.

Exhibit 4. Existing Retail/Commercial, Enumclaw Trade Areas, 2012



Parcels highlighted in **Exhibit 5** represent retail land uses within the City of Enumclaw. Nearly all retail uses within Enumclaw are clustered within or near Downtown or along the Highway 410 corridor. A concentration of auto showrooms and lots exists along Highway 410, while retail store and restaurant uses are more prevalent along Cole Street and Griffin Ave.

Exhibit 5. Existing Retail, City of Enumclaw, 2012



Source: King County Assessor, 2012, Community Attributes, Inc., 2012.

Consumer Buying Power

Exhibit 6 illustrates the consumer buying power (CBP) of residents that live within the Enumclaw Primary Trade Area. Total discretionary spending within the Enumclaw Trade Area amounted to \$70,768 per household in 2011 dollars. Discretionary spending for the remainder of Washington State was substantially less in 2011, at approximately \$50,000 per household.

Categories representing the highest proportion of spending include Services (16%), Motor Vehicles and Parts (18%) and Food and Beverage Stores (15%). Apparel and Accessories and Restaurants, Food Services and Drinking Places each represent 10% of overall spending.

Exhibit 6. Consumer Buying Power, Enumclaw Primary Trade Area, 2011

	Primary Trade Area (10 Min Drive Time)		Washington State	
	Dollars per Year	% of Total Spending	Dollars per Year	% of Total Spending
Services (includes Arts and Entertainment)	\$11,364	16%	\$8,281	16%
Motor Vehicles & Parts	\$12,683	18%	\$8,761	17%
Food & Beverage Stores	\$10,326	15%	\$8,851	17%
Restaurants, Food Services & Drinking Places	\$7,155	10%	\$5,683	11%
Apparel & Accessories	\$7,226	10%	\$5,207	10%
Furniture & Home Furnishing	\$4,193	6%	\$2,868	5%
Building Materials, Garden Equip & Supplies	\$3,988	6%	\$2,848	5%
Sporting Goods, Toys, Book & Music Stores	\$3,304	5%	\$2,441	5%
Contributions	\$3,150	4%	\$2,165	4%
Drug/Health Stores	\$3,056	4%	\$2,471	5%
Electronics & Appliances	\$2,602	4%	\$1,943	4%
Gas Stations & Convenience Stores	\$1,721	2%	\$1,488	3%
Total Discretionary Spending	\$70,768	100%	\$53,006	100%

Source: Claritas Inc., 2003, Office of Financial Management, 2012, Community Attributes, Inc., 2012.

Note: Data based on boundaries of the 98022 zip code, which closely aligns with the primary trade area.

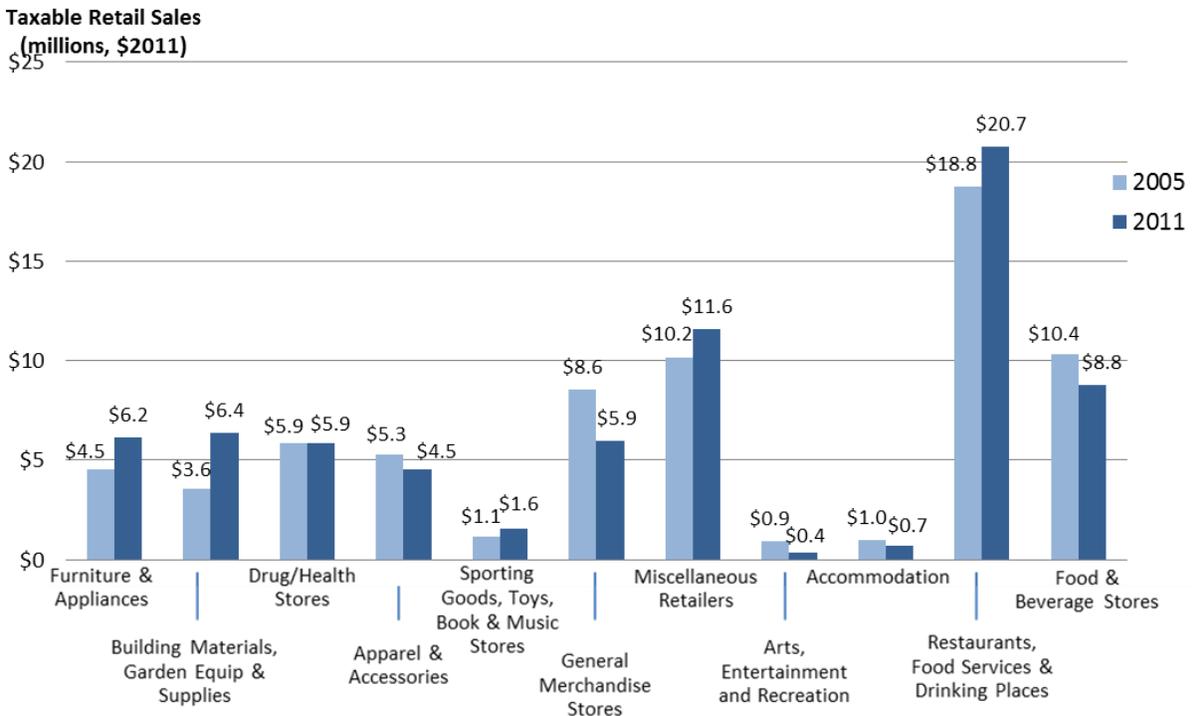
Taxable Retail Sales

The Washington State Department of Revenue provides taxable retail sales data based on the North American Industry Classification System (NAICS). **Exhibits 7 and 8** compare the City of Enumclaw’s taxable retail sales from 2005 to 2011 in terms of total value and on a per capita basis. Taxable retail sales for Motor Vehicles and Parts are not included and are analyzed in a separate section.

Several categories experienced growth in overall taxable retail sales from 2005 to 2011 (2011 dollars). Notable increases in total sales include Furniture and Appliances which increased from \$4.5 to \$6.2 million, Building Materials which more than doubled from \$3.6 to \$6.4, Miscellaneous Retailers which increased from \$10.2 million to \$11.6 million and Restaurants, Food Services and Drinking Places, which increased from \$18.8 million to \$20.7 million.

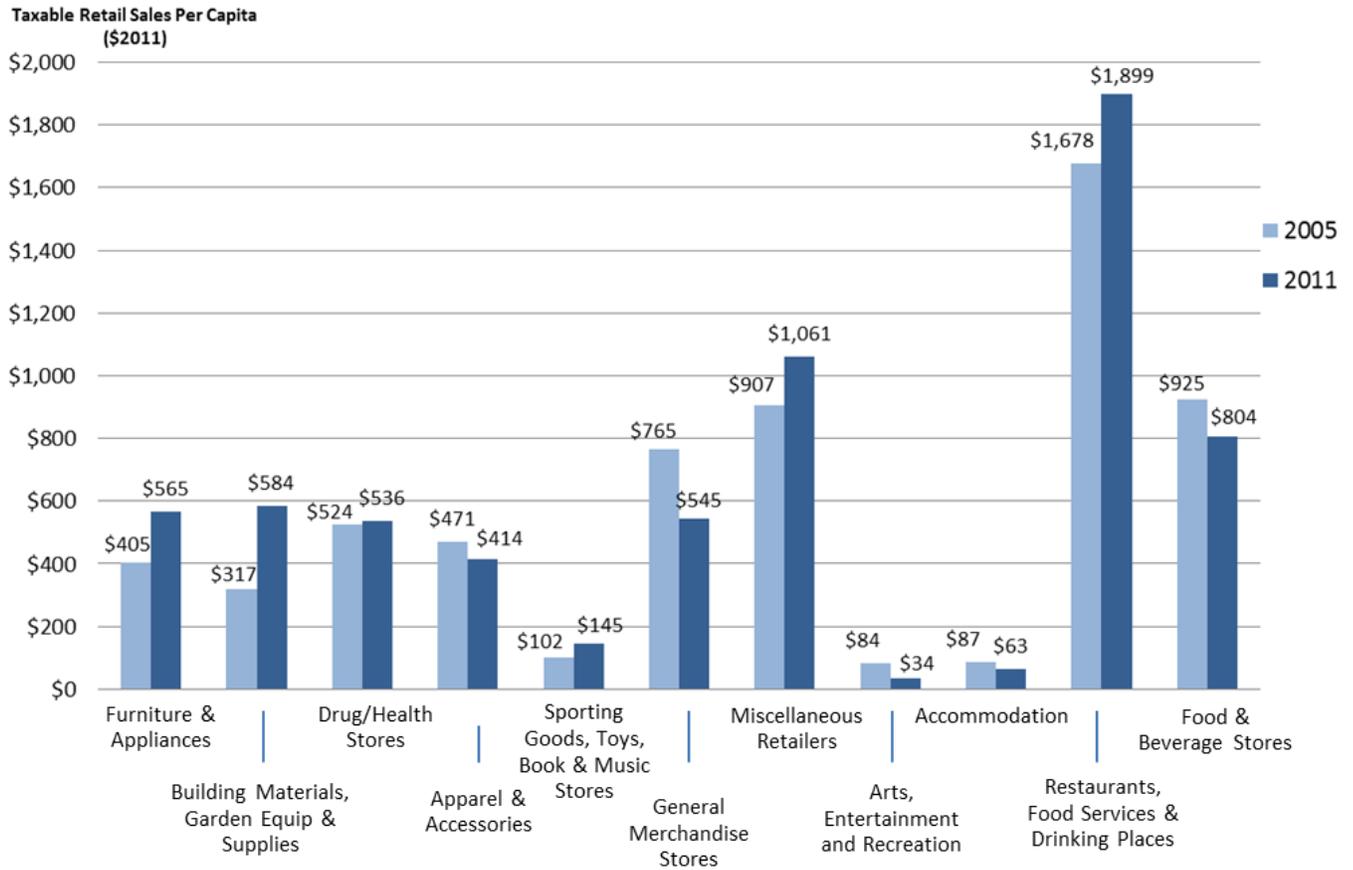
Categories that declined in overall revenues from 2005 to 2011 include Apparel and Accessories, General Merchandise Stores, Arts and Entertainment, Accommodation and Food and Beverage Stores. The General Merchandise category experienced the largest decline, decreasing from \$8.6 million in 2005 to \$5.9 million in 2011. The category represents department and big box retailers such as Costco, Target and any store that focuses on selling a large variety of goods from a single location.

Exhibit 7. Total Taxable Retail Sales by Category, City of Enumclaw, 2005-2011



Source: Washington Department of Revenue, 2012.

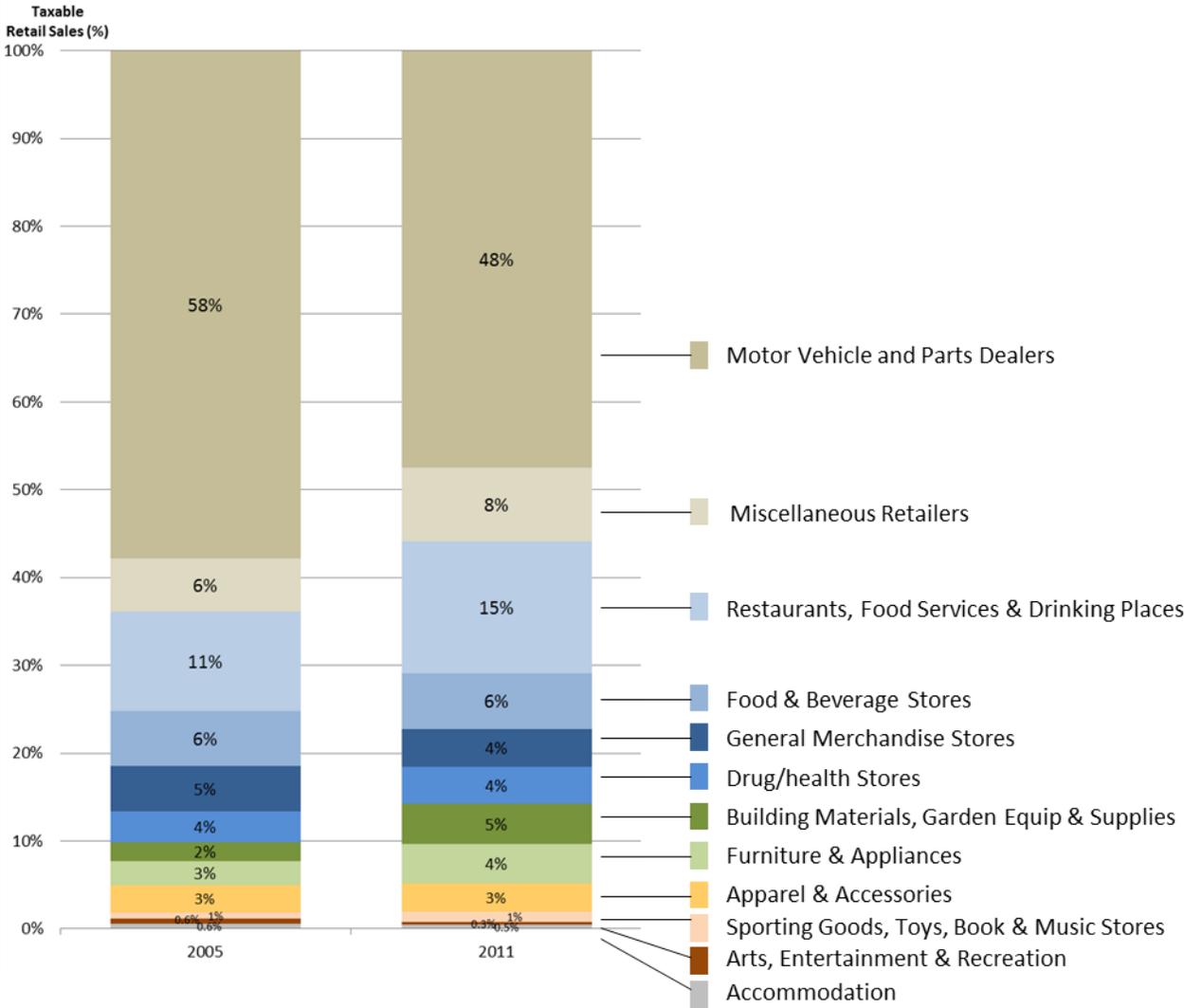
Exhibit 8. Per Capita Taxable Retail Sales, City of Enumclaw, 2005-2011



Source: Washington Department of Revenue, 2012, Washington Office of Financial Management, 2012.

The share of taxable retail sales by category is illustrated in **Exhibit 9**. Motor Vehicles and Parts, analyzed in more detail later in the analysis, makes up the largest share of taxable retail sales for the City of Enumclaw. Its share of taxable retail sales has declined from 2005 to 2011, but still represents nearly half of total retail sales. The next largest category is Restaurants, Food Services and Drinking Places, which has increased its share from 2005 to 2011 by 4%. The share of Miscellaneous Retailers has also increased from 6% in 2005 to 8% in 2011.

Exhibit 9. Taxable Retail Sales by Category, City of Enumclaw, 2005-2011



Source: Washington Department of Revenue, 2012.

Trade Capture Analysis

The trade capture analysis includes a detailed study of retail spending within the Enumclaw Primary Trade Area. The analysis utilizes taxable retail sales data collected by the Washington State Department of Revenue discussed in the previous section. The data are collected and organized by NAICS categories and location, allowing analysis and comparison of distinct retail types and geographic areas. In addition, population estimates and growth forecasts for Enumclaw and the region are utilized to establish per capita retail spending. The data allow for comparisons between different retail categories as well as overall assessment of trade capture within the Primary Trade Area. The analysis also provides the means to assess overall retail square footage growth based on varying trade capture scenarios.

Trade Capture Interpretation. Trade capture can be interpreted in the following manner: if a neighborhood had a trade capture rate of exactly 100%, then sales in that neighborhood would be equivalent to all residents in their neighborhood spending all of their disposable income within their neighborhood. This assumes that no outside consumers came into their neighborhood to purchase goods. A trade capture rate of 50% would be equivalent to all neighborhood residents spending half of their disposable income within their neighborhood. In reality, the trade capture rates presented below represent the percentage of spending power captured within a defined Trade Area.

Exhibit 10 illustrates trade capture by retail category for the City of Enumclaw Primary Trade Area. The exhibit illustrates retail categories in which the City of Enumclaw captures relatively well, including:

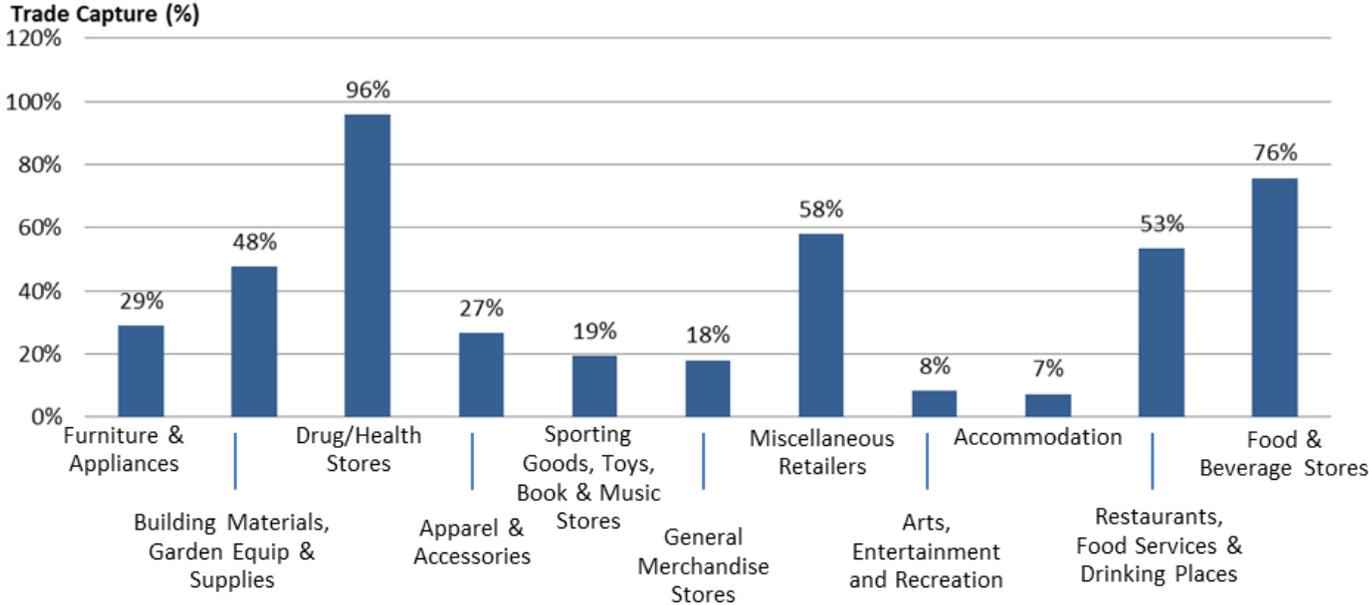
- Drug and Health Stores
- Food and Beverage Stores (grocery stores)
- Miscellaneous Retailers (specialized stores such as florists and pet supplies)

Conversely, the graph shows opportunities for growth in the following categories:

- Furniture and Appliances
- Apparel and Accessories
- Sporting Goods, Toys, Book and Music
- General Merchandise (department stores, large format discount stores)

Identifying the businesses that fall within each category is important in order to assess the specific types of retail where there is potentially room for growth. For example, General Merchandise Stores, with a relatively low trade capture rate, include large scale discount stores such as Target and Fred Meyer, both of which are located in nearby regional retail centers (Bonney Lake and Sumner) but not within the Enumclaw Primary Trade Area.

Exhibit 10. Trade Capture, City of Enumclaw, 2011



Source: Community Attributes, Inc., 2012.

Retail Growth Scenarios

Exhibit 11 provides the technical analysis of four retail growth scenarios, each representing a different amount of potential retail square footage growth. Influencing the analysis is anticipated population growth for the Enumclaw Primary Trade Area, forecasted to increase by 4,400 residents by 2030.

Total sales required per year are calculated under each scenario. Derived from total sales required are the additional sales required from the Primary Trade Area, a portion of which results from an increase in population.

Exhibit 11. Trade Capture Scenarios, City of Enumclaw, 2010-2030

	Additional Retail S.F. Desired			
	120,000	150,000	200,000	250,000
Retail Sales Required (per s.f. per year)	\$300	\$300	\$300	\$300
Total Sales Required (per year)	\$36,000,000	\$45,000,000	\$60,000,000	\$75,000,000
% from Primary Trade Area	40%	40%	40%	40%
Additional Sales Req'd from Primary Trade Area Residents	\$14,234,000	\$17,793,000	\$23,724,000	\$29,655,000
Increased Sales from Pop. Growth w/n Primary Trade Area	\$14,198,000	\$14,198,000	\$14,198,000	\$14,198,000
Net New Retail s.f. from Pop. Growth (all Trade Areas)	119,500	119,500	119,500	119,500
New Trade Capture Required (Sales)	\$0	\$3,600,000	\$9,500,000	\$15,500,000
Additional Sales per Capita in Trade Area	\$0	\$130	\$350	\$580
	Primary Trade Area (10 Minute Drive Area)			
Current Trade Capture	40%	40%	40%	40%
Trade Capture Target	40%	41%	44%	47%
	Secondary Trade Area (20 Minute Drive Time)			
Current Trade Capture	11%	11%	11%	11%
Trade Capture Target	11%	13%	16%	18%
	Primary Trade Area Population			
Population 2010	22,500			
Population 2030	26,900			
Growth	4,400			
CAGR	0.9%			

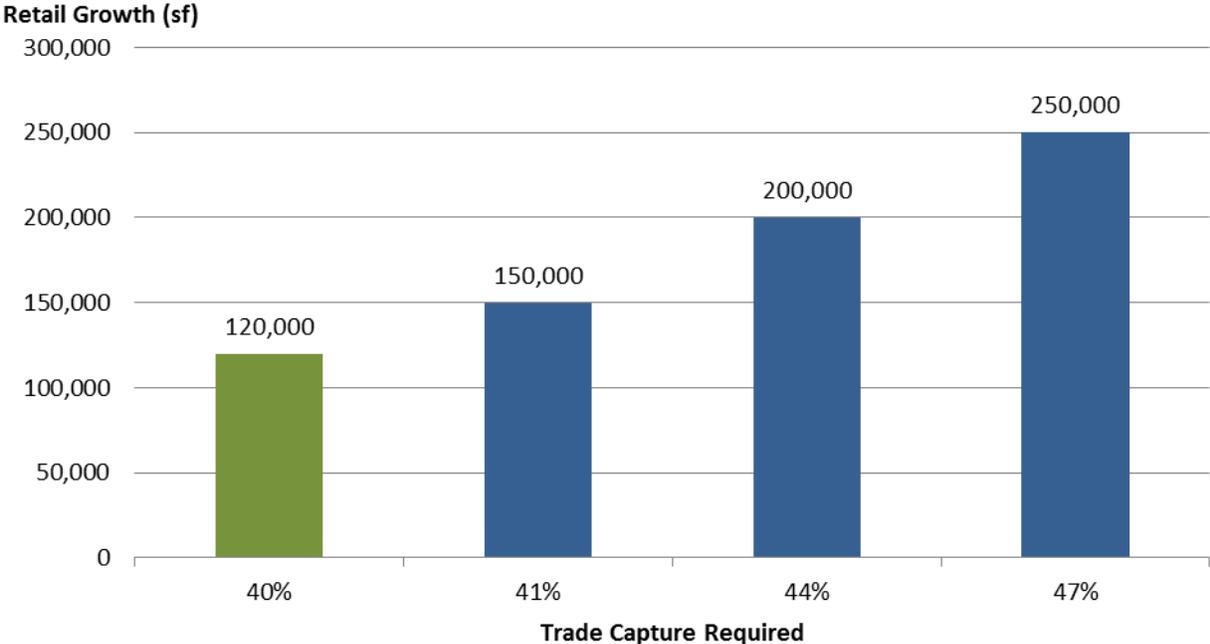
Source: Community Attributes, Inc., 2012.

Note: CAGR based on 2006 PSRC population growth estimates for the Enumclaw FAZ.

Exhibit 12 illustrates the amount of new retail space supportable by increases in trade capture based on the analysis shown in **Exhibit 11**. There is a positive correlation between trade capture and total retail building square footage. If trade capture increases the overall amount of net supportable retail square footage increases as well. Trade capture scenarios shown in **Exhibit 12** represent the Enumclaw Primary Trade Area trade capture rate and the corresponding net growth in retail square one can expect over the next 30 years. In 2011, overall trade capture within the Enumclaw Primary Trade Area was 40%. The population growth scenario is highlighted in green. The trade capture growth scenarios, shown in blue, of 41%, 44% and 47% illustrate increases in Enumclaw Primary Trade Area trade capture.

Population growth alone will account for approximately 120,000 net new square feet of retail. Increases in trade capture in combination with population growth would result in increased amounts of retail square footage. For example, if trade capture within the Primary Trade Area increased from 40% to 47% the amount of retail square footage would increase by 250,000 net square feet by 2030. Without growth, an increase in trade capture of 5% equates to 100,000 square feet in retail in Enumclaw.

Exhibit 12. Retail Growth Scenarios, Enumclaw Primary Trade Area, 2011-2030



Source: Community Attributes, Inc., 2012.

Exhibit 13 provides context for retailer’s square footage needs and illustrates the size and number of retail uses that might result from increases in trade capture. Neighborhood restaurants might require five thousand square feet. Boutique retail stores can range from a few hundred square feet to a few thousand square feet. A typical grocery store might require anywhere between 40,000 and 60,000 square feet. Major discount retailers can range from 50,000 square feet to upwards of 150,000 square feet.

Exhibit 13. Retail Square Footage Examples

Retail s.f. Growth	Retail Equivalent	Avg Unit Size
120,000	1 grocer	50,000
	5 family restaurants	6,000
	6 boutique shops	2,500
	1 small general retailer	25,000
150,000	1 grocer	50,000
	5 family restaurants	6,000
	8 boutique shops	2,500
	2 small general retailers	25,000
200,000	1 grocer	50,000
	5 family restaurants	6,000
	8 boutique shops	2,500
	1 large big box retailer	100,000
250,000	1 grocer	50,000
	5 family restaurants	6,000
	8 boutique shops	2,500
	1 small big box retailer	50,000
	1 large big box retailer	100,000

Source: Community Attributes, Inc., 2012.

Exhibit 14 illustrates retail square footage within the City of Enumclaw constructed since 1980. The list includes restaurants, banks, grocery stores, drug stores and car dealership to name a few. Since 1980 Enumclaw has had 225,220 gross square feet of retail construction. More than 64,000 square feet, or 29% was associated with auto or auto oriented sales while 44,000 square feet or 20% was associated with the construction of a new QFC. The exhibit does not represent a net gain in retail square, as some retail spaces may have been demolished or repurposed.

**Exhibit 14. Existing Retail Gross Square Feet,
City of Enumclaw, 1980-2012**

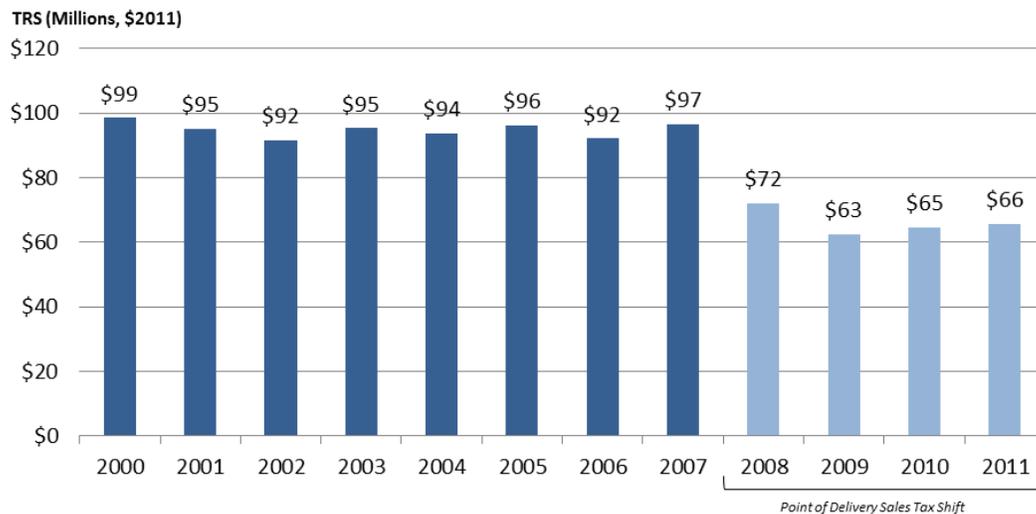
Year Built	Address	Assessor Building Description	Building Gross SF	Building Net Square Feet
2008	1335 Cole St	Retail Store	6,907	6,907
2007	1499 Garrett St	White River Credit Union (Bank)	7,855	7,855
2005	840 Roosevelt Ave	Sports Retail Store	14,400	14,400
2003	940 Stevenson Ave	Chase Bank	2,889	2,889
2003	1350 Garrett St	Walgreens Drug Store	14,392	14,392
2002	2537 Griffin Ave	TNT Espresso Stand	320	320
2001	1005 Stevenson Ave	Sears Building	12,441	12,441
1997	448 Roosevelt Ave	Suzuki Sales and Service Building	19,971	19,971
1994	240 Roosevelt Ave E	Retail	2,528	2,528
1992	1145 Cole St	Bank	4,160	4,160
1990	311 Griffin Ave	Fast Food Restaurant	2,190	2,190
1989	1009 Monroe Ave	QFC Grocer Store	44,284	44,284
1989	348 Roosevelt Ave	Fast Food Restaurant	3,334	3,334
1988	312 Roosevelt Ave	Convenience Mart w/Gas	2,478	2,478
1987	912 Griffin Ave	Hardware Store	10,880	10,880
1987	865 Watson St N	Fast Food Restaurant	2,236	2,236
1987	526 Roosevelt Ave	Auto Dealership	2,552	2,552
1987	1047 Roosevelt Ave E	Auto Dealership	24,564	24,564
1986	2415 Griffin Ave	Convenience Store w/Gas	3,015	3,015
1986	649 Griffin Ave	Tire Store	17,200	17,200
1985	640 Roosevelt Ave	Health Club	7,022	7,022
1983	2206 Roosevelt Ave	Convenience Store	1,440	1,440
1983	117 Roosevelt Ave	Retail	8,010	8,010
1982	1135 Roosevelt Ave E	Car Wash	1,872	1,872
1980	820 Griffin Ave	Restaurant	8,280	8,280
Total			225,220	225,220

Source: King County Assessor, 2012.

Motor Vehicle Sales and Trade Capture

In 2011 sales of Motor Vehicles and Parts made up 48% of selected taxable retail sales in the City of Enumclaw, more than any other retail category (see **Exhibit 9** in Taxable Retail Sales section). **Exhibit 15** illustrates Motor Vehicles and Parts retail sales from 2000 to 2011. Total retail sales amounted to \$66 million in 2011, down from a decade high of \$99 million in 2000 (in 2011 dollars). The economic downturn affected overall sales from 2007 to 2009, but sales have increased from 2009 to 2011.

Exhibit 15. Motor Vehicles and Parts Taxable Retail Sales, City of Enumclaw, 2000-2011



Source: Washington Department of Revenue, 2012.

Exhibit 16 illustrates the level of trade capture for Motor Vehicles and Parts for the City of Enumclaw. A trade capture rate of 166% within Enumclaw's Primary Trade Area indicates that the City draws motor vehicle shoppers from around the region, with greater sales per capita within the Primary Trade Area than the Tri-County region as a whole.

Exhibit 16. Motor Vehicles and Parts Trade Capture, City of Enumclaw, 2011

Enumclaw Primary Trade Area	2011
Taxable Retail Sales	\$65,763,614
Taxable Retail Sales Per Capita Primary Trade Area	\$2,922
Trade Capture Primary Trade Area	166%

Source: Washington Department of Revenue, 2012, Community Attributes, Inc., 2012.

COMPARISON CITIES AND COMPARATIVE ADVANTAGES

The following economic profiles contrast Enumclaw demographics and economic conditions to selected cities for comparison. The data provide a foundation for discussion about the City's comparative advantages within the regional economy.

Comparison Cities

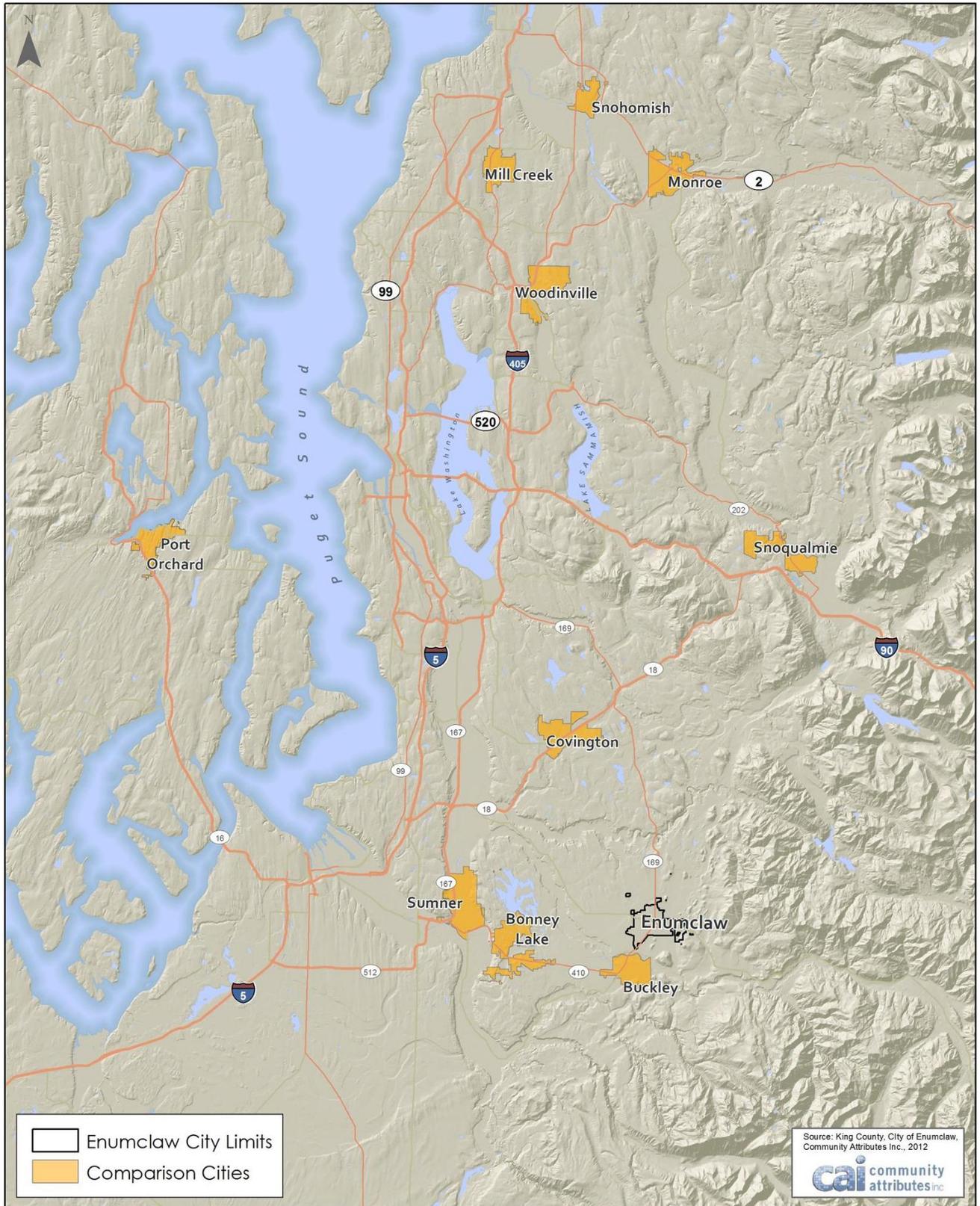
Comparison Cities are presented in three groups (**Exhibit 17**). Neighbors are cities of similar size which are located near Enumclaw. Comparable Cities are similar in size to Enumclaw and are more regionally distributed. They also carry varying traits, such as differing jobs-to-housing ratios and taxable retail sales per capita. Larger Cities were chosen based on the degree to which they reflect potential futures of Enumclaw, whether that be through employment or population. In addition, King and Pierce Counties are analyzed to provide regional context. **Exhibit 18** illustrates the locations of each Comparison City.

Exhibit 17. Comparison Cities, Puget Sound Region

Type	City
Neighbor	Buckley
Neighbor	Bonney Lake
Neighbor	Sumner
Comparable	Snohomish (City)
Comparable	Port Orchard
Comparable	Snoqualmie
Larger	Covington
Larger	Woodinville
Larger	Mill Creek
Larger	Monroe

Source: Community Attributes, Inc., 2012.

Exhibit 18. Enumclaw Comparison Cities, Puget Sound Region, 2012

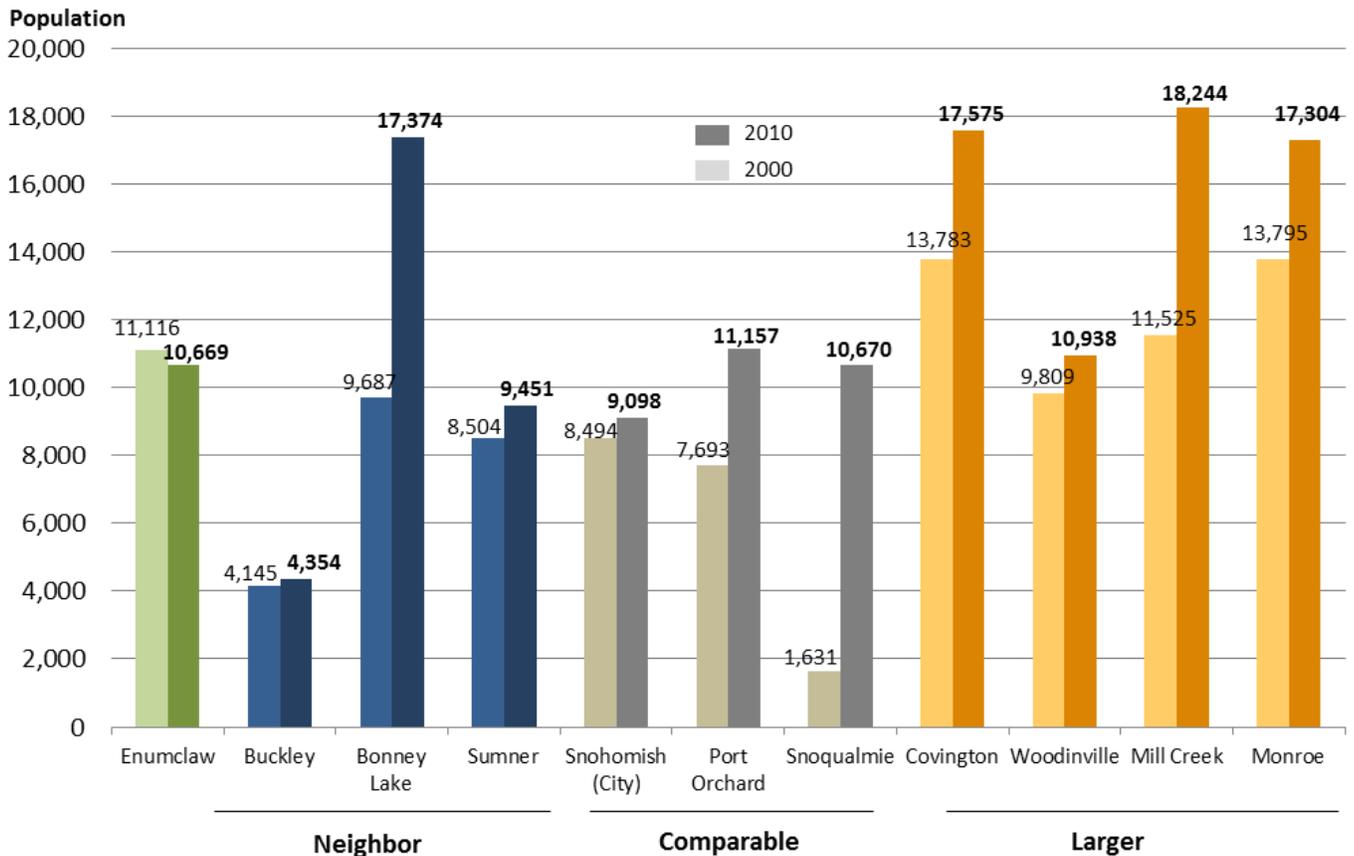


Population

Exhibit 19 compares Enumclaw’s population growth from 2000 to 2010 with all ten Comparison Cities. Enumclaw is the only city of those analyzed that did not experience population growth during that time period. Among Neighbor Cities, Buckley added 209 residents, while Bonney Lake expanded more rapidly by adding more than 7,600 residents, a portion of which was through annexation. Sumner added more than 900 residents during the time period.

Among Comparable Cities, Snoqualmie’s population changed the most substantially from 2000 to 2010, growing from 1,631 to 10,670 residents, an increase of 9,039. All three Larger Cities experienced growth from 2000 to 2010, with Mill Creek growing from 11,525 residents in 2000 to 18,244 residents in 2010.

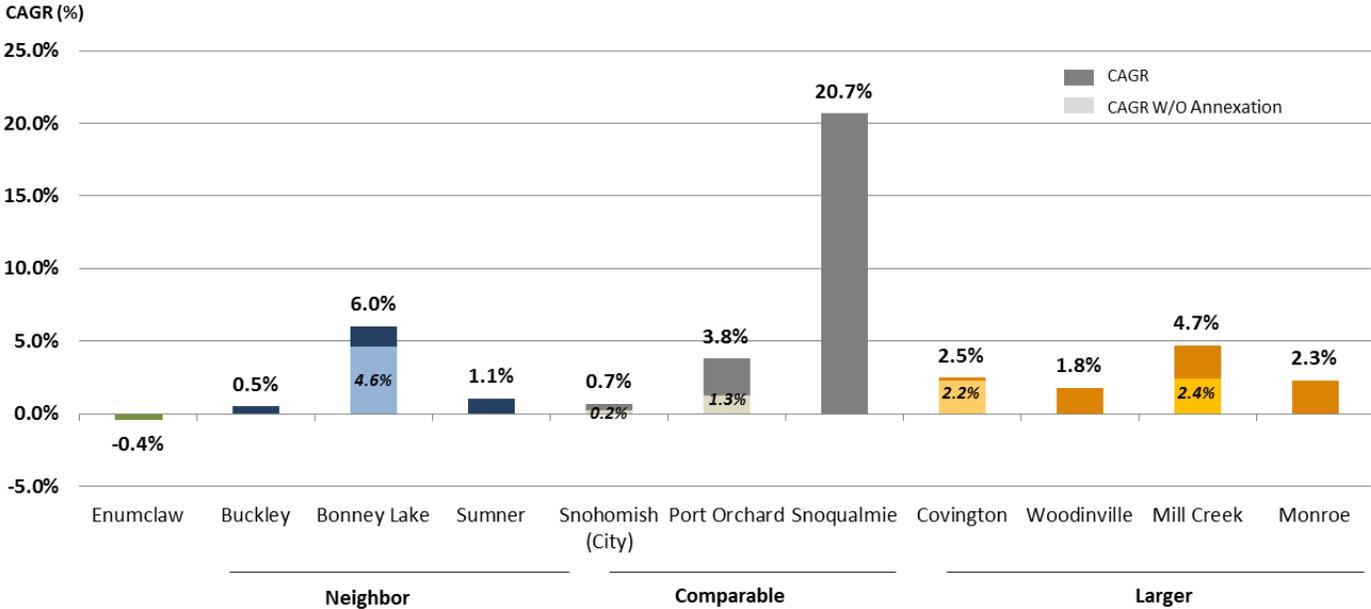
Exhibit 19. Population, Comparison Cities, 2000-2010



Source: Washington Office of Financial Management, 2012.

Exhibit 20 illustrates population growth rates and distinguishes population growth resulting from annexations. Bonney Lake, Snohomish, Port Orchard, Covington and Mill Creek all approved significant annexations from 2000 to 2010 that included incorporation of existing populations. Snoqualmie had the highest growth rate absent any annexations.

Exhibit 20. Population Growth Rate, Comparison Cities, 2000-2010



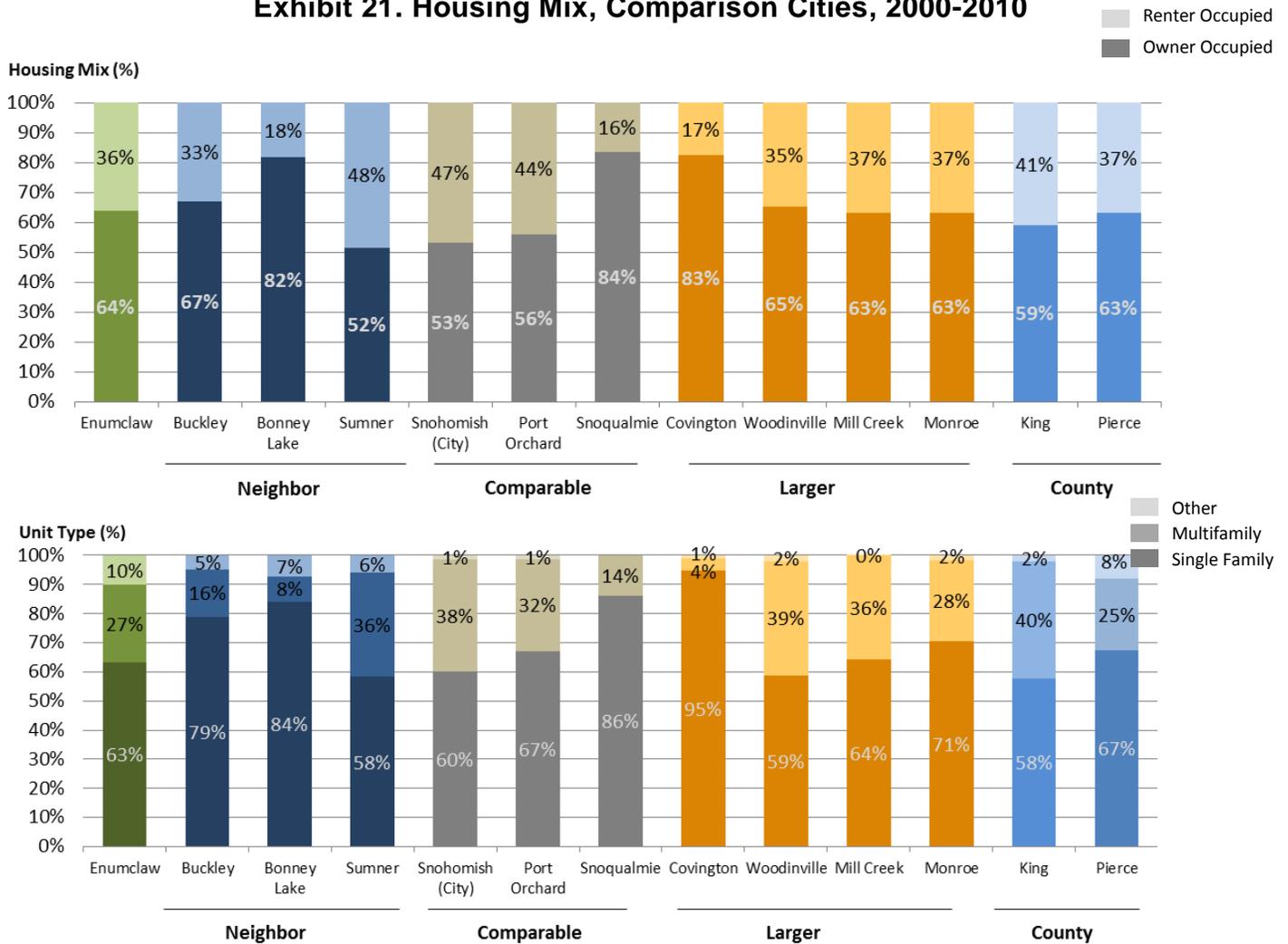
Notes: The City of Enumclaw had a moratorium on annexations through March of 2009.
 Source: Washington Office of Financial Management, 2012.

Housing Mix

Enumclaw's housing mix, measured by the percentage of owner occupied and renter occupied housing units, is similar to Pierce County, with less renters proportionally than King County (**Exhibit 21**). Among Comparable Cities, Enumclaw's rate of 64% owner occupied housing units is similar to that of Buckley, Woodinville, Mill Creek, and Monroe. Bonney Lake (82% owner occupied) and Snoqualmie (84% owner occupied) have fewer renters, while Snohomish (47% renter occupied) and Port Orchard (44% renter occupied) have larger proportions of renter occupied housing units.

Exhibit 21 also details housing units by type. Enumclaw housing units are predominantly single family, representing 63% of all housing units. 27% of all units are multifamily, while 10% fall into the Other category, which consists of mobile homes and other forms of housing.

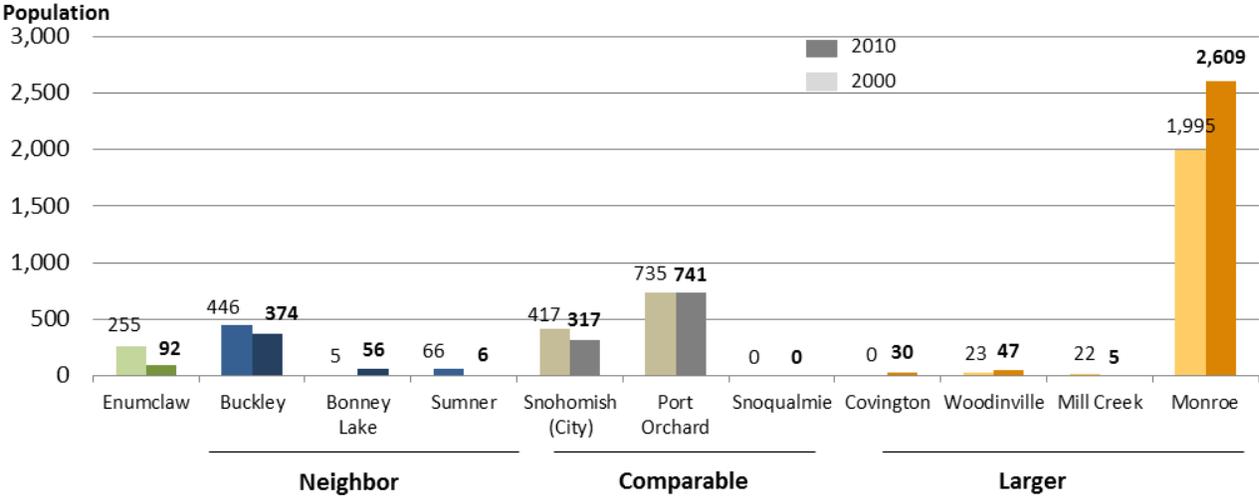
Exhibit 21. Housing Mix, Comparison Cities, 2000-2010



Source: 2010 US Census.

Exhibit 22 illustrates the change in group quarters population from 2000 to 2010. Group quarters are facilities such as dorms and assisted living facilities. Enumclaw’s population of group quarters residents declined over the decade. Several Comparison Cities have little to no group quarters population, while Monroe has a substantial group quarters population that grew over the last decade.

Exhibit 22. Group Quarters, Comparison Cities, 2000-2010



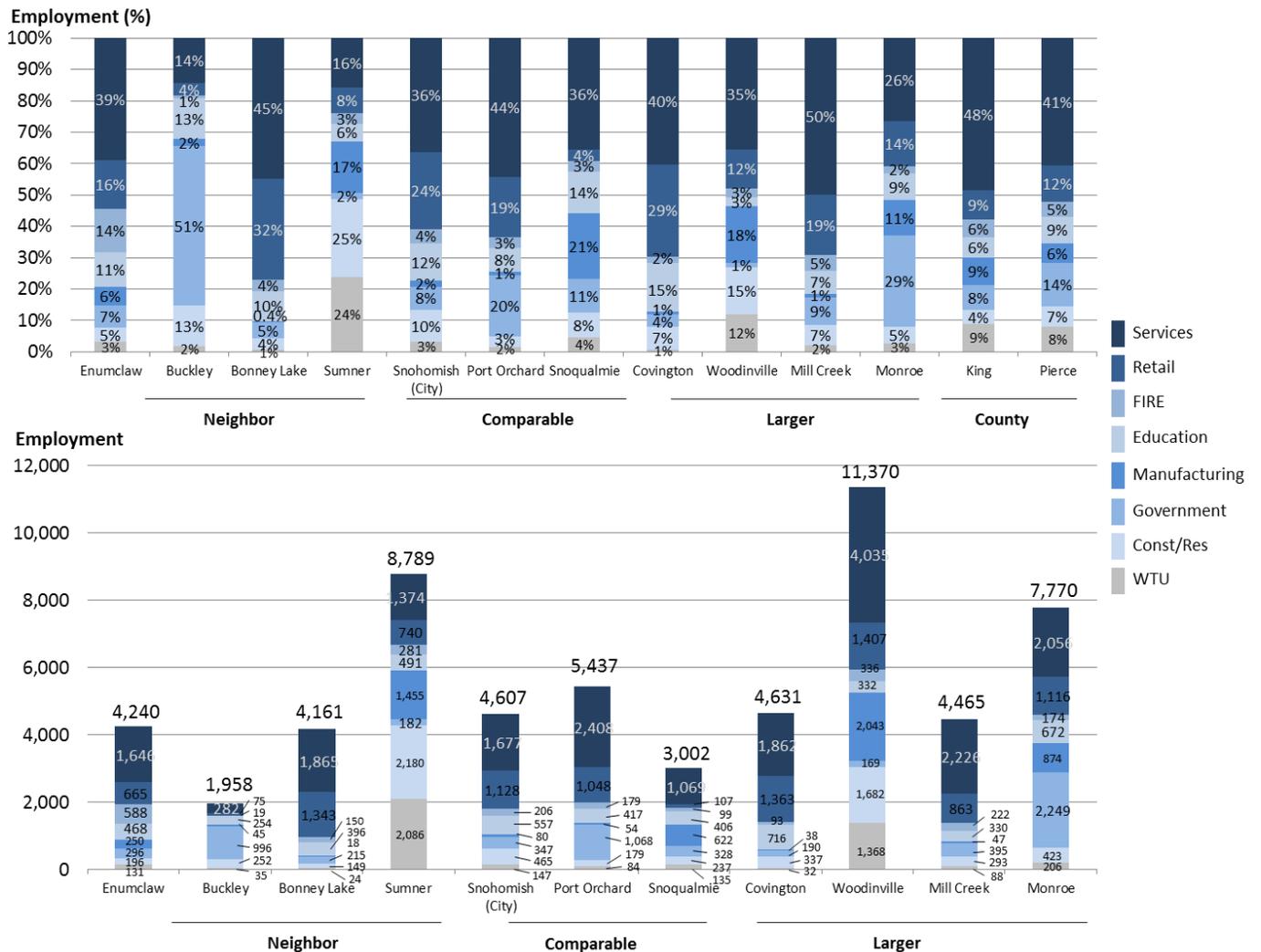
Source: Washington Office of Financial Management, 2012.

Employment

Enumclaw's largest sector, Services, made up 39% of total employment within the City in 2010. This is similar to the proportion of Service sector jobs found in Pierce County (41%) and less than the proportion found in King County (48%) (Exhibit 23).

Among Comparison Cities, Enumclaw has a larger proportion of Service Sector employees than Buckley, Sumner, Snohomish, Snoqualmie, Woodinville, and Monroe. Cities with larger Service sectors include Bonney Lake, Port Orchard and Mill Creek. The Finance, Insurance and Real Estate sector (FIRE) made up 14% of Enumclaw's total employment, more than in all Comparison Cities except Snoqualmie.

Exhibit 23. Covered Employment by Sector (%), Comparable Cities, 2010

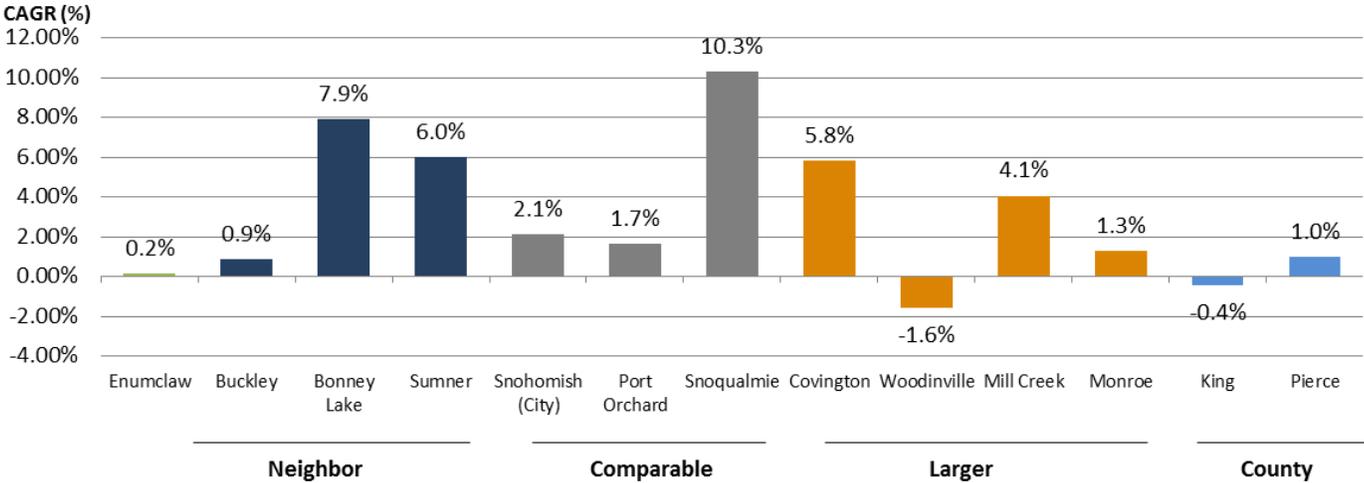


Source: Puget Sound Regional Council, 2012.

*Notes: FIRE is Finance, Insurance and Real Estate; WTU. is Wholesale, Transportation and Utilities.

Annual employment growth (CAGR) varies greatly between cities, with Enumclaw’s growth rate from 2000 to 2010 at 0.2% (**Exhibit 24**). During the same period, King County employment decreased at a rate of -0.4% while Pierce County grew at rate of 1.0%. Among Comparison Cities, Snoqualmie experienced the greatest growth rate at 10.3% while Bonney Lake, Covington, Sumner, and Mill Creek also experienced relatively high employment growth rates.

Exhibit 24. Employment Growth, Comparisons Cities, 2000-2010



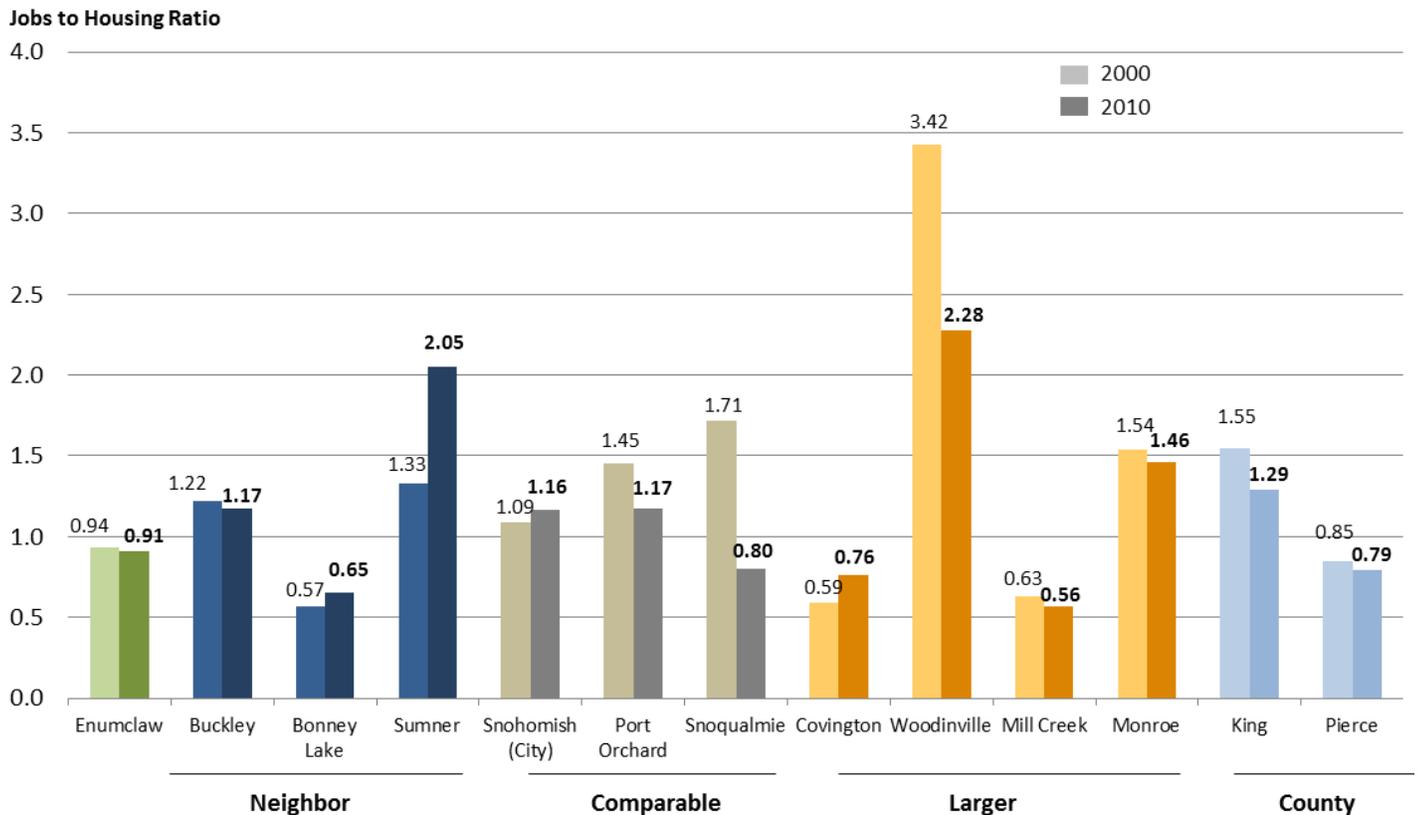
Source: Puget Sound Regional Council, 2012.

Jobs-to-Housing Ratios

A city's jobs-to-housing ratio illustrates whether a city is an employment center or bedroom community (**Exhibit 25**). Enumclaw's 2010 jobs-to-housing ratio of 0.9 indicates a balanced mix of housing and employment, meaning it is neither an employment center nor bedroom community, but rather a balance of both. Enumclaw's jobs-to-housing ratio decreased slightly from 2000 to 2010, indicating housing growth outpaced that of employment.

A look at Comparison Cities and the region as a whole reveals that Enumclaw has a balanced jobs-to-housing ratio compared to other cities. Locations considered employment centers in 2010 are Sumner, Woodinville, Monroe, and King County. In the same year, locations considered bedroom communities are Bonney Lake, Snoqualmie, Mill Creek and Pierce County. Buckley, Snohomish, and Port Orchard have jobs-to-housing ratios closer to that of Enumclaw's. Only Sumner experienced a major shift in the direction of employment with a jobs-to-housing ratio change of 1.33 to 2.05 from 2000 to 2010. Woodinville and Snoqualmie experienced shifts towards housing with substantial drops in jobs-to-housing ratios.

Exhibit 25. Jobs-to-housing Ratio, Comparison Cities, 2000-2010

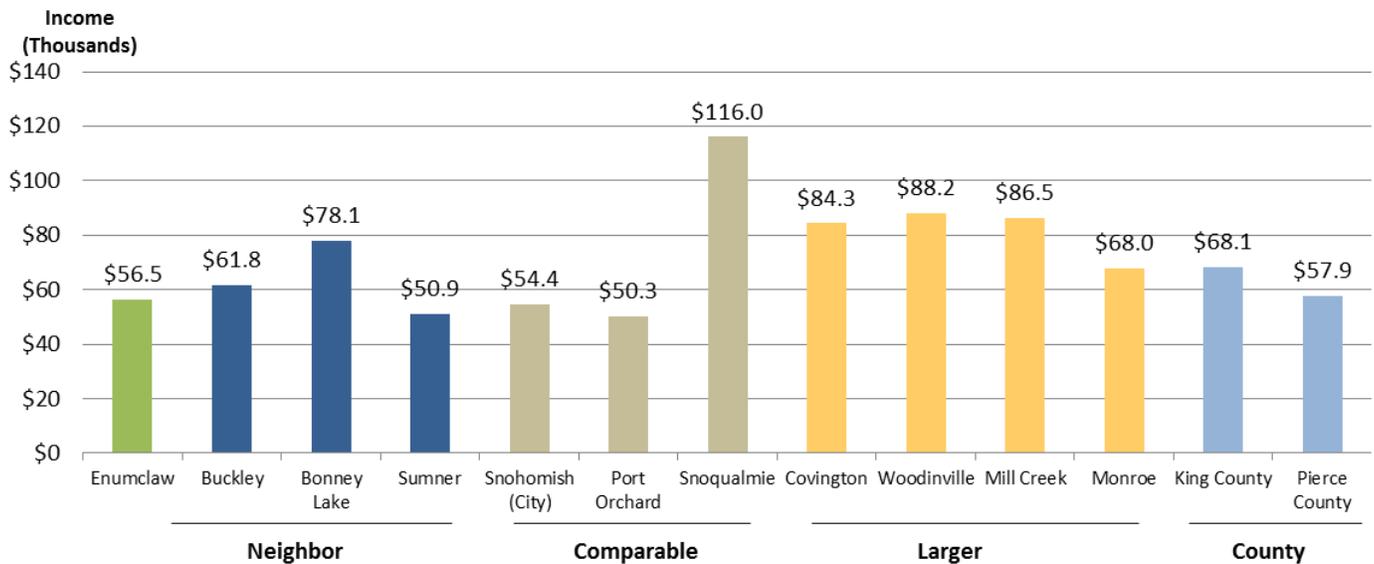


Source: Washington Office of Financial Management, 2012, Community Attributes, Inc., 2012.

Household Income

Enumclaw had a 2010 median household income of \$56,495 in 2010. Among Neighbor cities, both Buckley and Bonney Lake have higher median household incomes (**Exhibit 26**). Among Comparable Cities, Enumclaw has a higher median household income than both Snohomish and Port Orchard, but is substantially lower than Snoqualmie, which has a median household income of \$116,020, substantially higher than any other municipality analyzed. All four Larger Cities had higher median household incomes than Enumclaw, with Woodinville the highest at \$88,221. Enumclaw's median household income is comparable to Pierce County's, which was \$57,869 in 2010.

Exhibit 26. Median Household Income, Comparison Cities, 2010

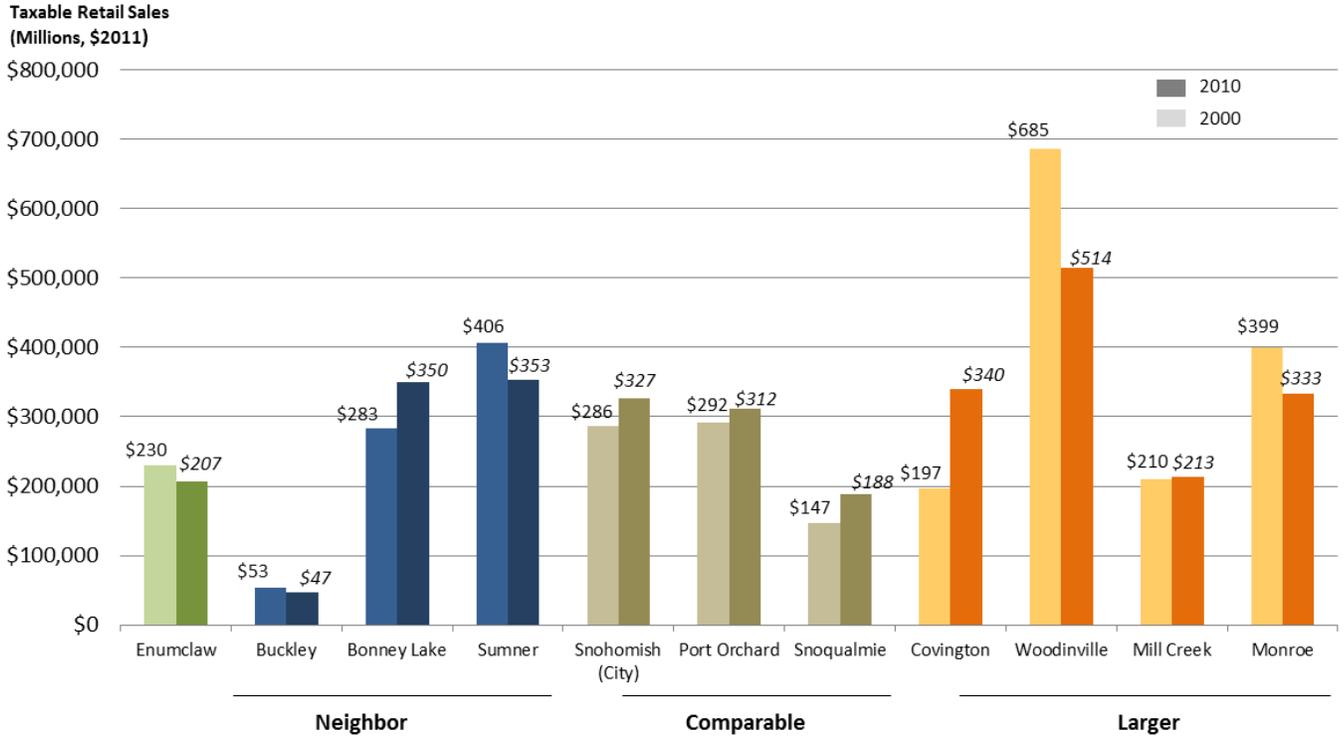


Source: American Community Survey, 5 Year Average, 2010.

Taxable Retail Sales

Total taxable retail sales from 2000 to 2010 for comparison cities are shown in **Exhibit 27** (in 2011 dollars). Enumclaw experienced a decline in taxable retail sales, similarly to several other cities, during this time period. Several other cities, including Bonney Lake and Covington experienced growth.

Exhibit 27. Taxable Retail Sales, Comparison Cities, 2000-2010

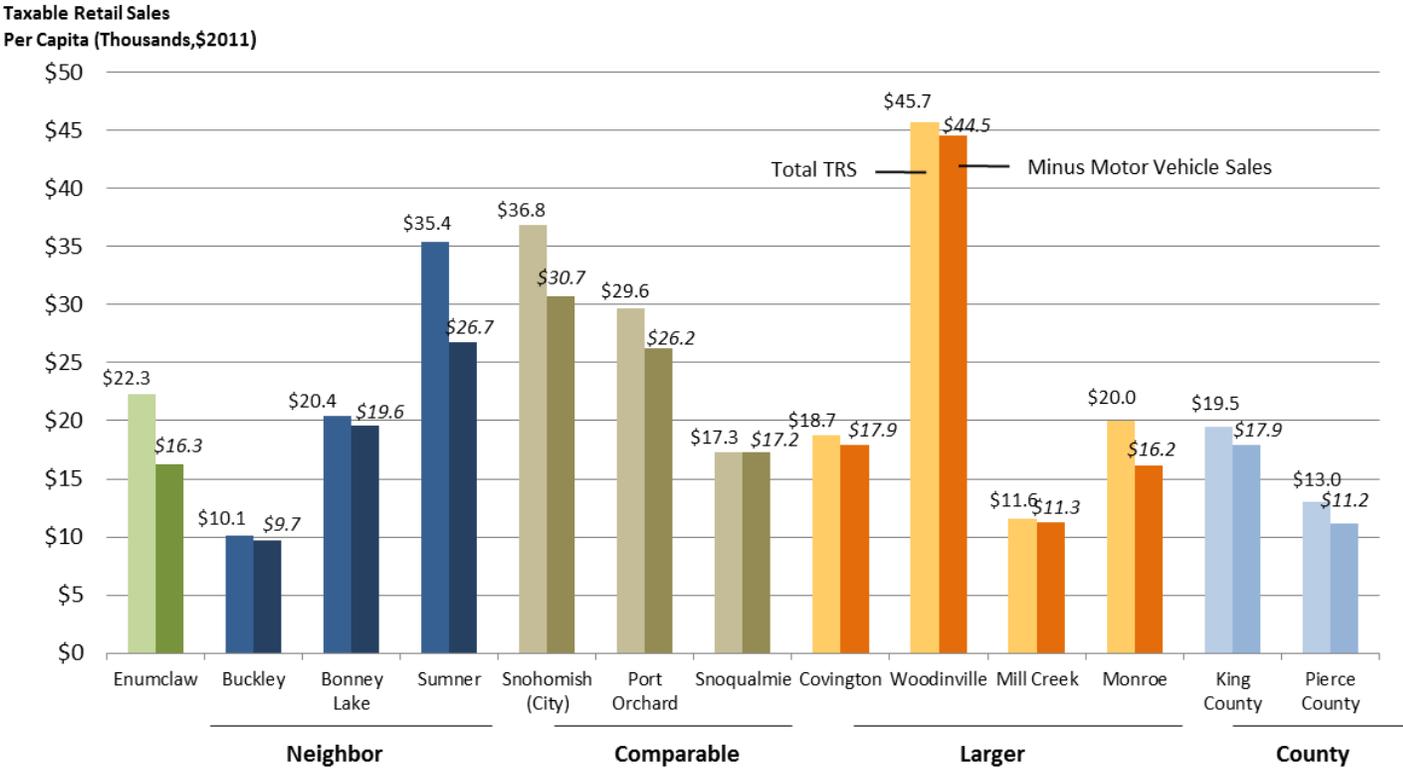


Source: Washington Department of Revenue, 2012, Washington Office of Financial Management, 2012

The City of Enumclaw had a taxable retail sales per capita ratio of \$22,300 in 2010 (2011 dollars) including motor vehicle sales, exceeding the sales per capita of Buckley, Bonney Lake, Snoqualmie, Mill Creek, Monroe, King County, and Pierce County (**Exhibit 28**). Cities with higher taxable retail sales per capita are Sumner, Snohomish, Port Orchard and Woodinville. Cities with higher taxable retail sales per capita are likely drawing shoppers from outside their Primary Trade Area.

Exhibit 28 also illustrates taxable retail sales per capita minus motor vehicle sales. A significant portion of taxable retail sales in Enumclaw originate from automobile sales. When motor vehicle sales are not included, Enumclaw’s taxable retail sales decreases to \$16,300 per capita. Among comparison cities only Sumner, Port Orchard and Monroe showed similar decreases in per capita sales. For comparison, Enumclaw has a similar ratio as Bonney Lake, Snoqualmie, Monroe and King County but is substantially lower than ratios found in Sumner, Shohomish, Port Orchard and Woodinville.

Exhibit 28. Taxable Retail Sales Per Capita, Comparison Cities, 2010



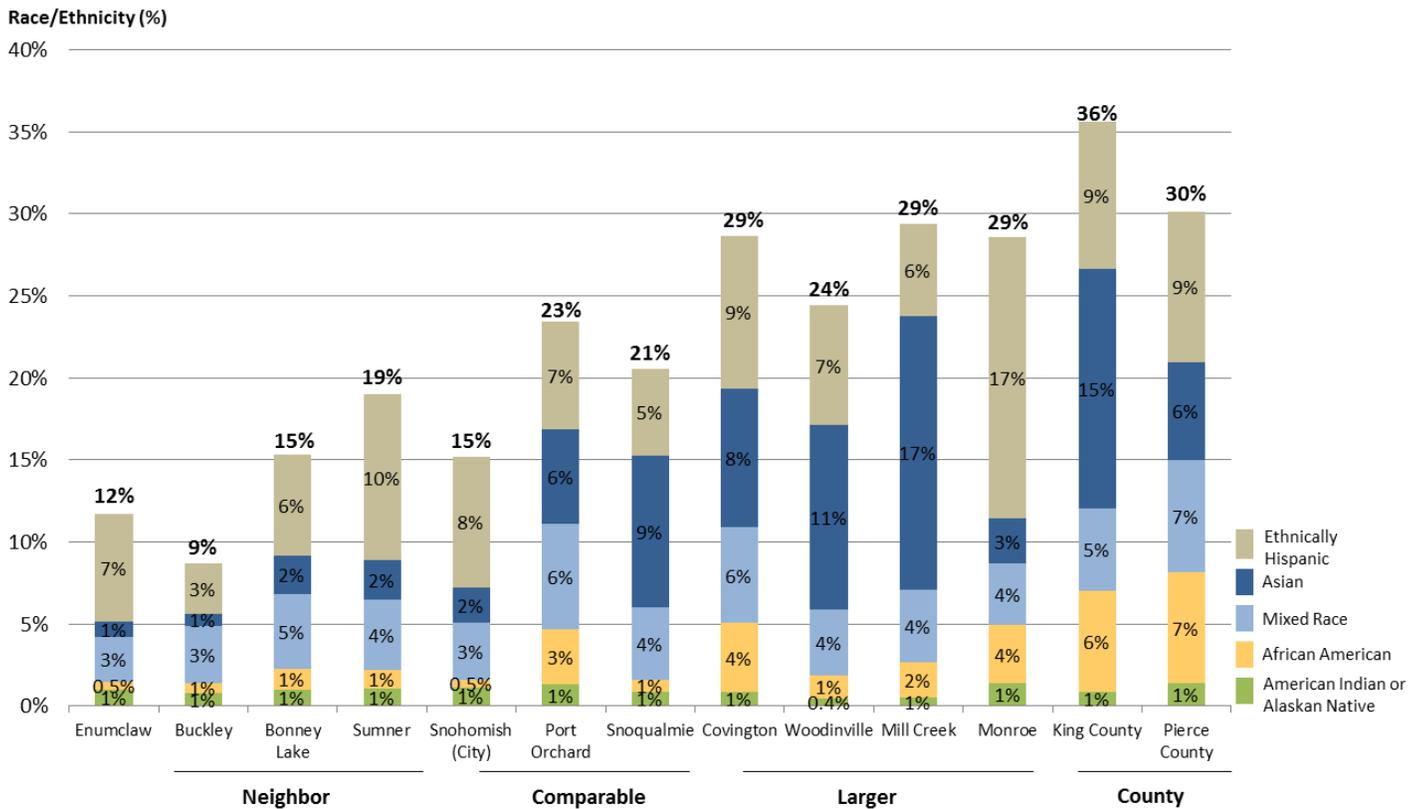
Source: Washington Department of Revenue, 2012, Washington Office of Financial Management, 2012.

Race/Ethnicity and Nationality

The City of Enumclaw’s population has a relatively smaller proportion of ethnic minority residents than the Comparable Cities, King County and Pierce County, as shown in **Exhibit 29**. Only neighboring Buckley with 9% has a lower percentage of residents who are ethnic minorities.

The percentage of Enumclaw’s population that is Ethnically Hispanic is 7%, similar to the percentages found in Bonney Lake, Snohomish, Port Orchard, and Woodinville. Both Buckley and Enumclaw have relatively small percentages of Asian populations, both at 1%. On a regional scale, 36% of King County’s population is considered an ethnic minority while 30% of Pierce County’s population is considered ethnic minority.

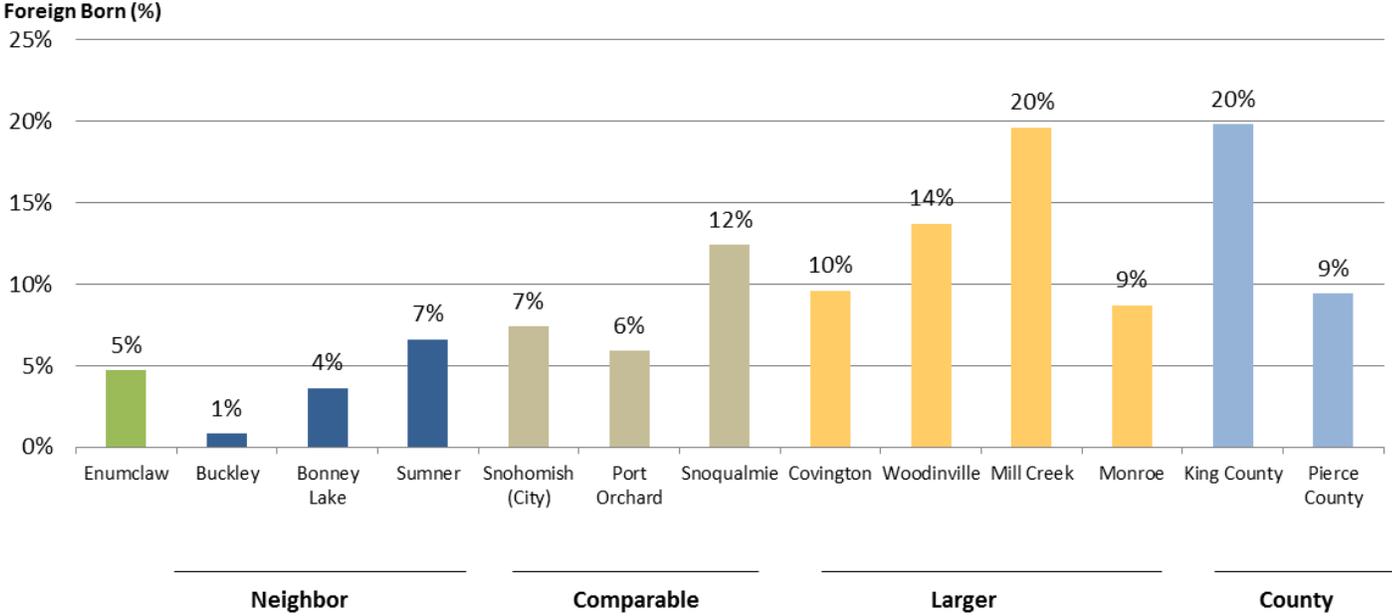
Exhibit 29. Minority Races as Percentage of Population, Comparison Cities, 2010



Source: 2010 US Census.

The foreign born population of Enumclaw represents 5% of the total population, similar to Sumner, Snohomish, and Port Orchard (**Exhibit 30**). King County has a foreign born population of 20% while Pierce County has a foreign born population of 9%. Woodinville and Mill Creek, both Larger Cities, have the highest concentrations of foreign born residents with 14% and 20%.

Exhibit 30. Foreign Born Population, Comparison Cities, 2010

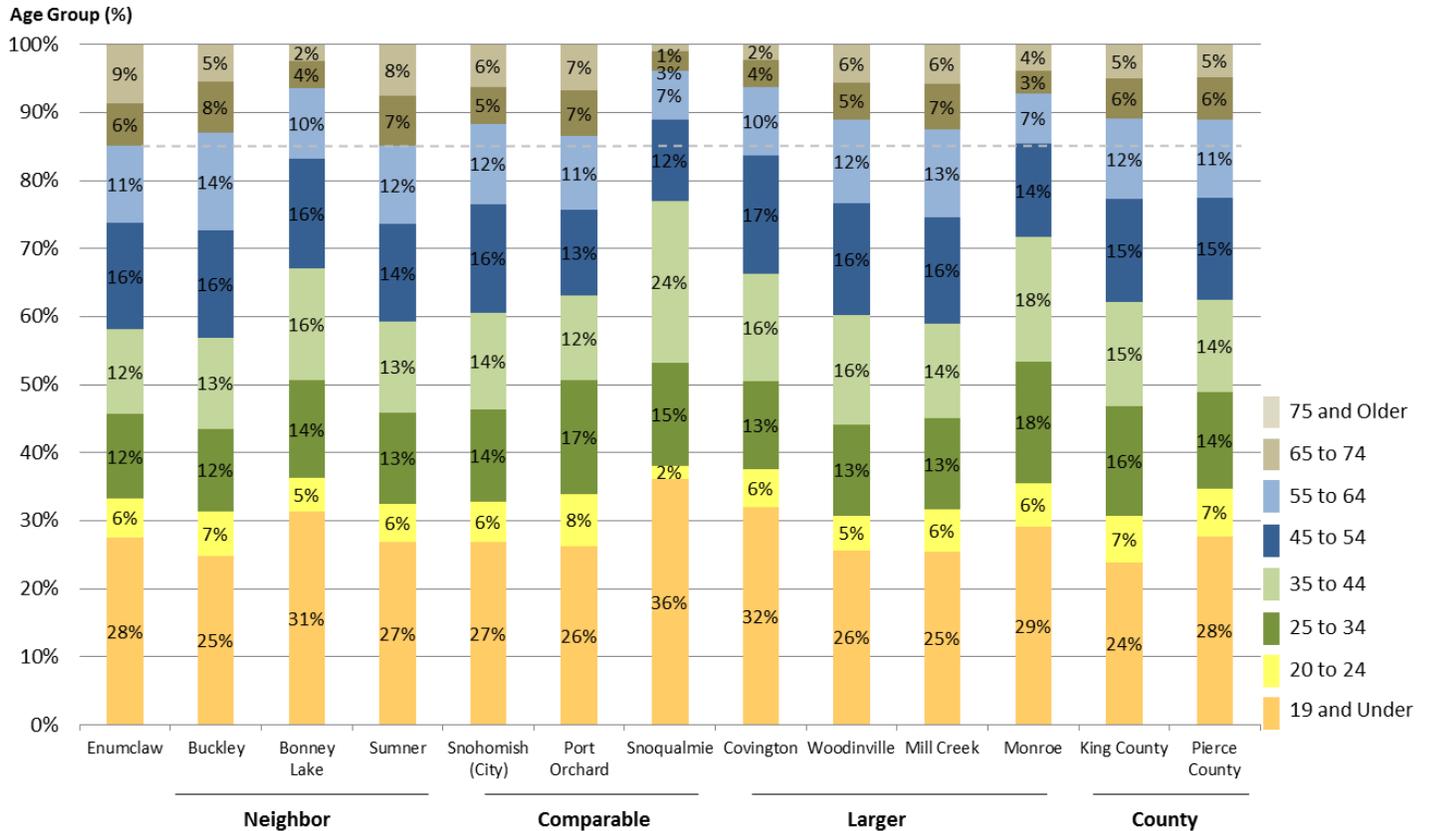


Source: American Community Survey, 5 Year Average, 2010.

Age Distribution

When analyzed alongside Comparison Cities, Enumclaw’s age distribution is most similar to those of Sumner and Snohomish (**Exhibit 31**). The percentage of Enumclaw residents 65 or older was 15% in 2010 (grey dashed line highlights this portion of the population), highest, along with Sumner, among Comparison Cities. Bonney Lake and Snoqualmie have the lowest concentration of 65 and over residents with 6% in Bonney Lake and 4% in Snoqualmie.

Exhibit 31. Age Distribution, Comparison Cities Puget Sound Region, 2010



Source: 2010 US Census.

PROSPECTIVE INDUSTRIES

The following section provides an analysis of existing industries and employment sectors within the City of Enumclaw.

Existing Industries and Employment

Exhibit 32 illustrates the top ten employers located within the City of Enumclaw. The company's facility size and overall level of employment for 2010 and 2012 are provided. The two largest employers within Enumclaw are the Enumclaw Insurance Group, also known as Mutual of Enumclaw, and the Enumclaw School District. The Enumclaw Insurance Group employed 482 people in 2012 and is one of the largest privately held companies in Washington State with a total of 85,000 square feet of office space in Downtown Enumclaw. The Enumclaw School District is the largest overall employer with 508 employees in 2012. Other major employers include St. Elizabeth Hospital, which employed 209 people in 2012. Other companies with more than 100 employees include the Helac Corporation (manufacturing, 235 employees in 2012), the Washington State Department of Natural Resources South Puget Sound Regional Office (Public Administration, 109 employees in 2012) and Hill Aerosystems Inc. (Manufacturing, 143 employees in 2012).

Exhibit 32. Top 10 Employers, City of Enumclaw, 2010 Updated

2010 Rank	Company Name	Facility Size (s.f.)	2010 Local Employees	2012 Full	2012 Part	2012 Total Employees	NAICS Classification
				Time Employees	Time Employees		
1	Enumclaw School District	621,513	567	270	238	508	Educational Services
2	Enumclaw Insurance Group (Mutual)	85,000	458	444	38	482	Finance and Insurance
3	Franciscan Health System - Hospital	94,000	221	149	60	209	Health Care and Social Assistance
4	Helac Corporation	100,000	160	233	2	235	Manufacturing
5	City of Enumclaw	45,514	125	90	10	100	Public Administration
6	Washington State Dept. of Natural Resources	27,568	110	85	24	109	Public Administration
7	Hill Aerosystems Inc.	13,755	80	142	1	143	Manufacturing
8	Franciscan Health System - Clinic	25,997	70	60	0	60	Health Care and Social Assistance
9	Sanford Motors Inc. (Dodge dealer)	48,000	48	35	0	35	Retail Trade
10	Frankie's Pizza-Enumclaw, LLC	5,000	44	20	5	25	Accommodation and Food Services

Source: Hoovers, 2011.

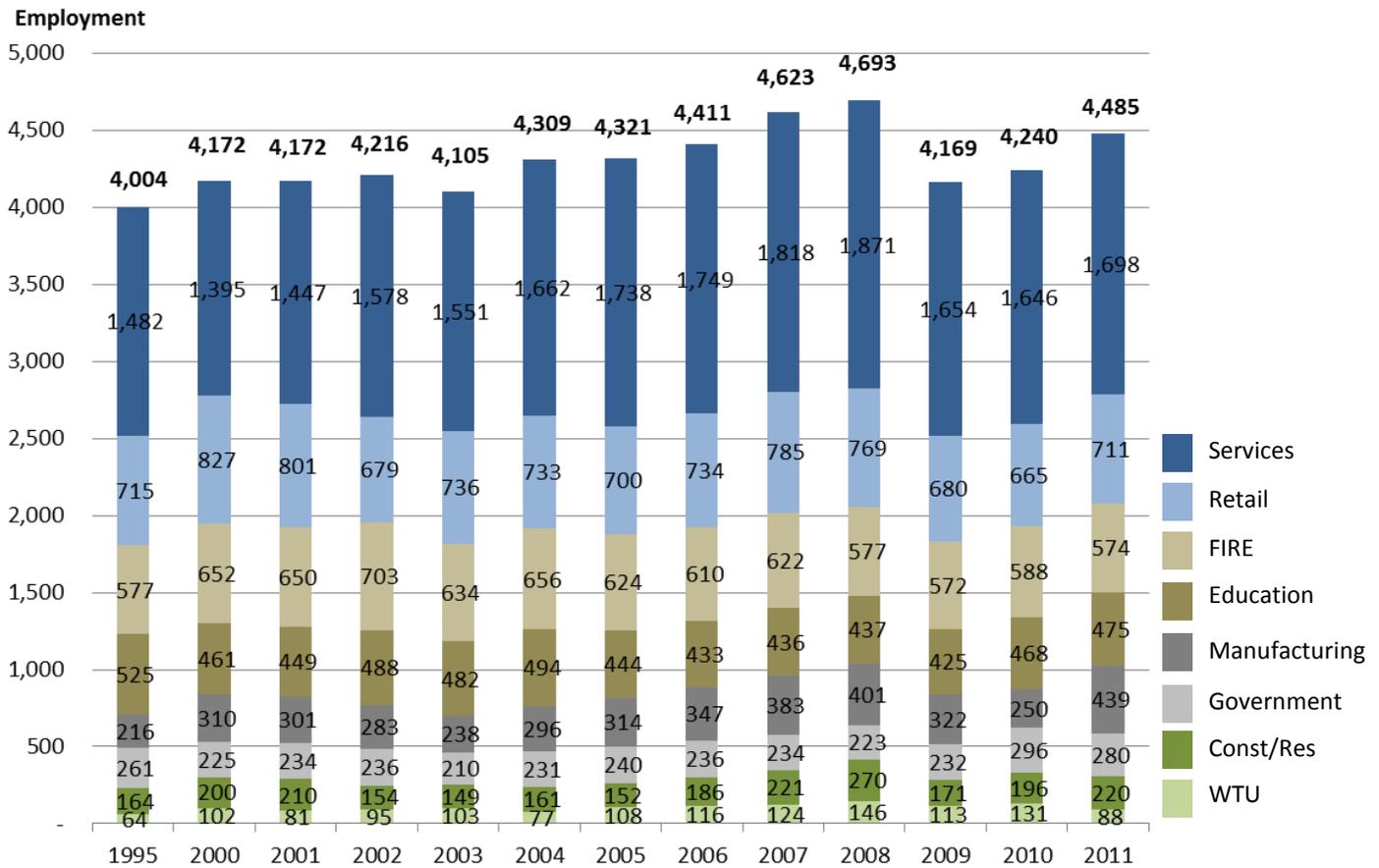
Jobs by Sector

Jobs within Enumclaw City Limits have fluctuated similarly to changes experienced in the regional and national economy. **Exhibit 33** illustrates Enumclaw's employment by major sector from 1995 to 2011. **Exhibit 34** illustrates the Four County Region's employment by sector during the same time period (King, Pierce, Snohomish and Kitsap Counties). Overall historical employment has followed broad market trends, with growth experienced from 2003 to 2008 and decline during the 2008 to 2010 period. Employment has grown both regionally and within Enumclaw since 2010, with Enumclaw experiencing steady growth from 2009 to 2011. From 2000 to 2011 Enumclaw experienced a .7% annual growth rate (CAGR), slightly more than the 0.2% growth rate experienced across the Four County Region.

The Services industry employs the largest number of employees within Enumclaw, representing 38% of all employees in 2011 compared to 45% in the Four County Region. The number of Service industry sector employees has fluctuated over the last decade in Enumclaw with a high of 1,871 in 2008. Retail employment decreased over the last decade from 827 in 2000 to 665 in 2010, a negative (-)2.0% annual growth rate, but increased to 711 employees from 2010 to 2011. The Retail sector represents the second largest employment sector within Enumclaw. The Construction sector also experienced rapid growth and decline, decreasing from a decade high of 270 employees in 2008 to 171 in 2009. Since 2009 employment in the Construction sector has steadily grown and totaled 220 jobs in 2011.

The three sectors with the highest growth rates within Enumclaw from 2000 to 2011 are the Services sector (1.8% CAGR), the Government sector (2.0% CAGR) and the Manufacturing sector (3.2% CAGR). Regionally, the highest growth sectors over the same time period were Services (1.3% CAGR), Government (1.2% CAGR) and Education (.7% CAGR).

Exhibit 33. Covered Employment by Sector, City of Enumclaw, 1995-2011

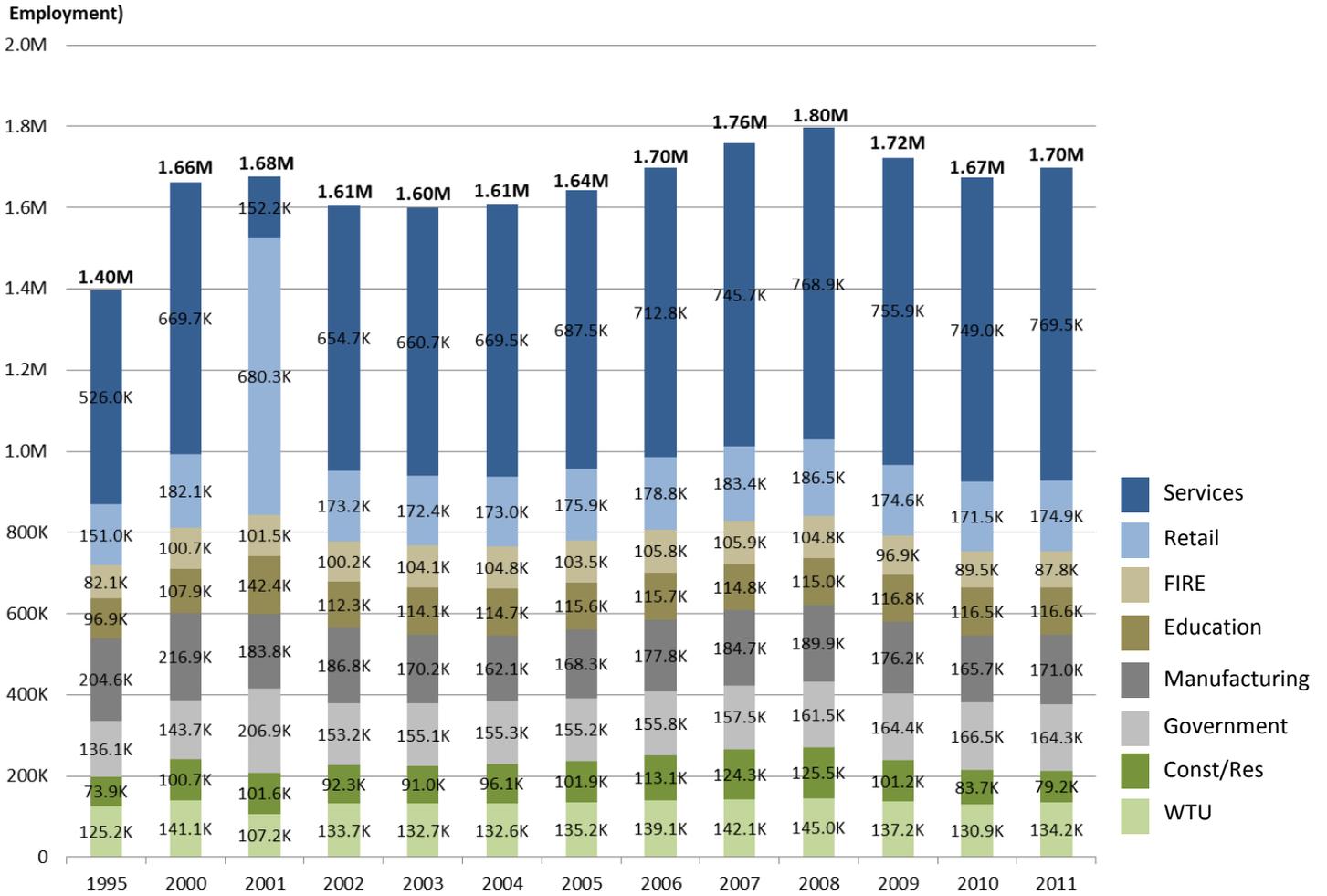


	City Employment		Percent of City Jobs		Jobs Change, 2000-2011		
	2000	2011	2000	2011	Net	% Net	CAGR
Total	4,172	4,485	100%	100%	313	8%	0.7%
Const/Res	200	220	5%	5%	20	10%	0.9%
FIRE	652	574	16%	13%	(78)	-12%	-1.2%
Manufacturing	310	439	7%	10%	129	42%	3.2%
Retail	827	711	20%	16%	(116)	-14%	-1.4%
Services	1,395	1,698	33%	38%	303	22%	1.8%
WTU	102	88	2%	2%	(14)	-14%	-1.3%
Government	225	280	5%	6%	55	24%	2.0%
Education	461	475	11%	11%	14	3%	0.3%

Source: Puget Sound Regional Council, 2012.

*Notes: FIR. is Finance, Insurance and Real Estate; WTU is Wholesale, Transportation and Utilities.

Exhibit 34. Covered Employment By Sector, Four County Region, 1995-2011



	Regional Employment		Percent of Regional Jobs		Jobs Change, 2000-2011		
	2000	2011	2000	2011	Net	% Net	CAGR
Total	1,662,879	1,697,448	100%	100%	34,569	2%	0.2%
Const/Res	100,698	79,164	6%	5%	(21,534)	-21%	-2.2%
FIRE	100,733	87,772	6%	5%	(12,961)	-13%	-1.2%
Manufacturing	216,880	170,963	13%	10%	(45,917)	-21%	-2.1%
Retail	182,076	174,885	11%	10%	(7,191)	-4%	-0.4%
Services	669,741	769,521	40%	45%	99,780	15%	1.3%
WTU	141,122	134,177	8%	8%	(6,945)	-5%	-0.5%
Government	143,739	164,348	9%	10%	20,609	14%	1.2%
Education	107,890	116,618	6%	7%	8,728	8%	0.7%

Source: Puget Sound Regional Council, 2012.

* Notes: FIR is Finance, Insurance and Real Estate; WTU is Wholesale, Transportation and Utilities.

Journey to Work

The following exhibits examine the geographical profile of Enumclaw resident's commute to work, and where Enumclaw employees commute from.

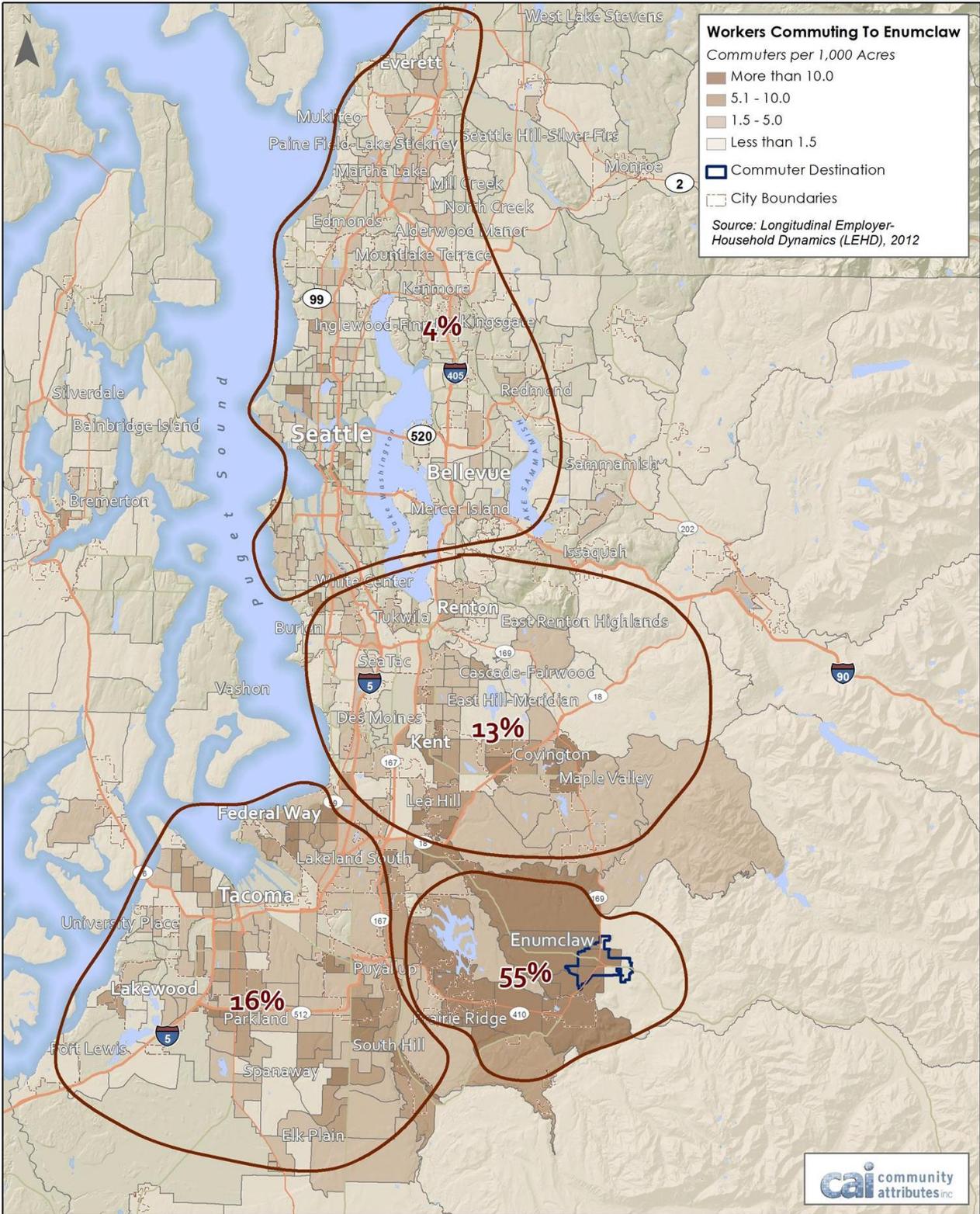
Exhibits 35 and 36 summarizes the geographical areas where people that work in Enumclaw commute from. More than half of all Enumclaw employees live within the area known as the Enumclaw Plateau. The Tacoma/Federal way area is home to 16% of Enumclaw employees and the Kent/Renton/SeaTac area is home to 13% of Enumclaw employees. Far fewer employees commute from the Seattle/Bellevue/Everett area, accounting for only 4% of Enumclaw employees.

Exhibit 35. Workers to Enumclaw Summary, Puget Sound Region, 2010

Region	Workers	Percentage
Enumclaw Plateau	2,385	55%
Kent/Renton/SeaTac	557	13%
Tacoma/Federal Way	709	16%
Seattle/Bellevue/Everett	165	4%
Total Workers	4,341	100%

Source: Longitudinal Employer-Household Dynamics (LEHD), 2012, Community Attributes, Inc., 2012.

Exhibit 36. Residence of Workers Commuting to Enumclaw, Puget Sound Region, 2010



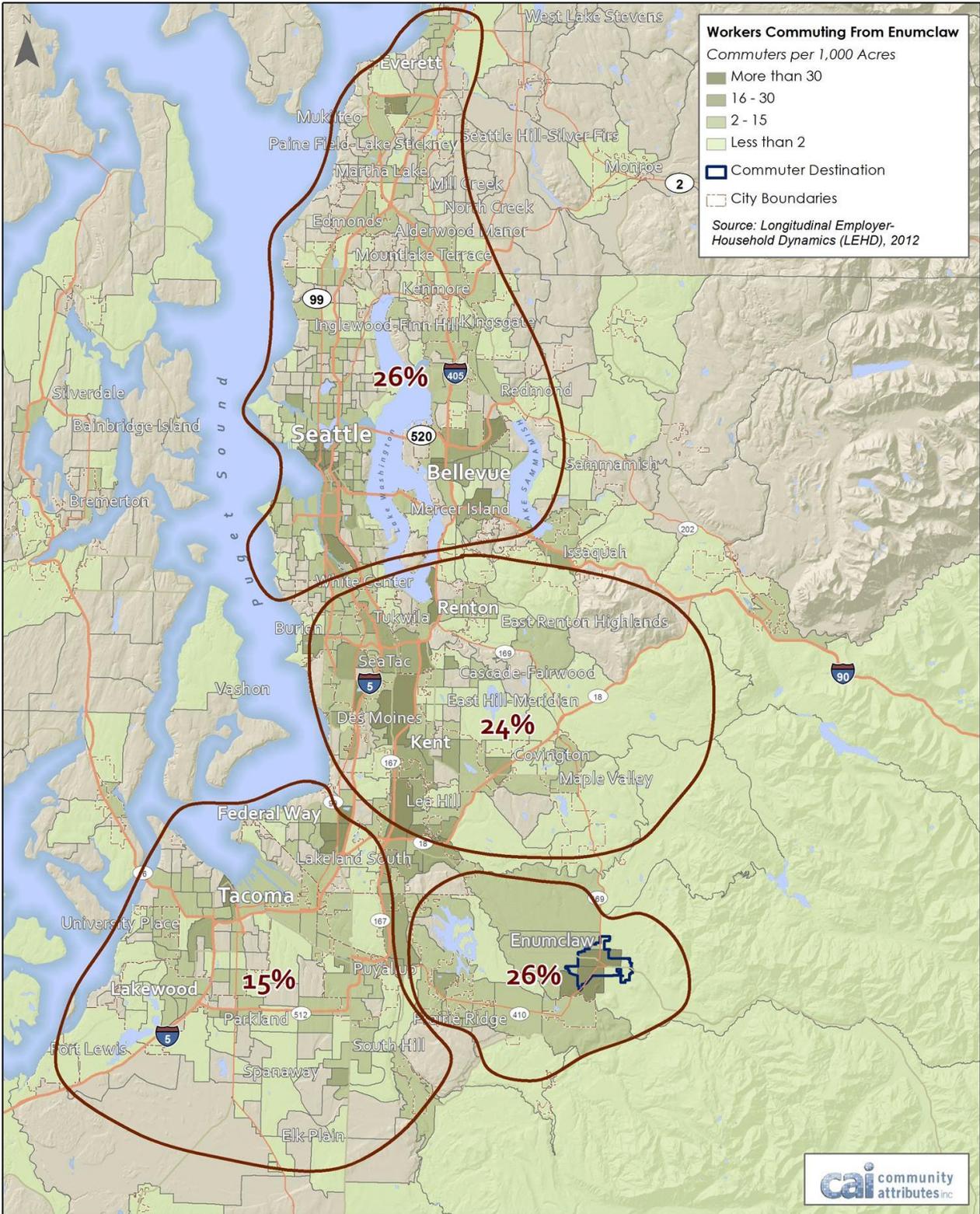
Exhibits 37 and 38 summarize the geographical locations of Enumclaw residents that are employed. Employed people that live within Enumclaw are distributed across Pierce and King Counties with concentrations of workers in Seattle/Bellevue/Everett, Kent/Renton/SeaTac and within the Enumclaw Plateau/City of Enumclaw. The analysis suggests that approximately two thirds of Enumclaw residents commute to areas outside of the Enumclaw Plateau.

**Exhibit 37. Workers from Enumclaw Summary,
Puget Sound Region, 2010**

Region	Workers	Percentage
Enumclaw Plateau	1,334	26%
Kent/Renton/SeaTac	1,262	24%
Tacoma/Federal Way	763	15%
Seattle/Bellevue/Everett	1,364	26%
Total Workers	5,228	100%

Source: Longitudinal Employer-Household Dynamics (LEHD), 2012, Community Attributes, Inc., 2012.

Exhibit 38. Enumclaw Residents Place of Employment, Puget Sound Region, 2010



POTENTIAL STRATEGIES

The following section provides examples of potential economic development strategies for the City of Enumclaw to consider. They include ideas brought forth by City staff as well as strategies discussed by the Economic Development Task Force. The City's Economic Development Task Force has structured economic development strategies into two categories: *Retain and Encourage Growth of Existing Businesses* and *Attract New Businesses*.

Retain and Encourage Growth of Existing Businesses

Programs

- *Store Front Improvement Program*: Loan interest revolving loan program to help fund the revitalization of existing building facades.
- *Storefronts Art Program*: Bring art installations and artists into vacant downtown retail space

Marketing and Advertising

- Way-finding Signs
- Web page
- Marketing materials: Brochures, DVD, magazines
- Media: Television, Radio, Press Releases

Incubators and Industry Clusters

- *Agricultural and Food Product Incubator*: Design and installation of facilities necessary for the production of agricultural and/or food product manufacturing that start-up companies can rent at low cost to create and develop products before investing in expensive equipment. Examples: jams/jellies, baked goods, wine-making, distilled spirits and cheese.
- *Business Incubator*: Facility that offers office space, shared office equipment, accounting help and business counseling for start-up companies that aren't ready purchase their own space.
- *Technical Assistance*: City staff helps the companies organize materials and provide needed data for bond offering statements for Washington Economic Development Finance Authority bonds.

Attract New Businesses

Development Fee Reductions or Deferrals

- *Impact Fee Waiver or Deferral*: Waiver or deferral of impact fees for new development to encourage development within specific target neighborhoods or business sectors.
- *Reduce Development Fees*: Reduce development fees by 50% for small businesses (20 fewer full time employees) who are starting up or relocating.

Development Code, Plans and Studies

- *Simplify* requirements, timeframes and regulations
- *Reduce* regulatory requirements
- *Density bonus*' for targeted neighborhoods, *Zoning, Infrastructure Plans*

Tax Exemptions and Refunds

- *Multi-Family Tax Exemptions*: Tax exemption for 8 years for new multi-family or rehabilitated housing units constructed in specific target neighborhoods (typically downtown).
- *Construction Sales Tax Refund*: Provides a refund for purchasers who have paid Sales and Use Tax on construction materials, fixed equipment, labor and services or machinery installation directly related to new commercial construction or redevelopment of existing buildings.

Infrastructure Design and/or Development

- *Storm water capacity infrastructure*: Design and installation of infrastructure to benefit development within specific target neighborhoods or for specific business sectors.
- *Street Construction*: Construct streets to benefit development within specific targeted neighborhoods or for specific business sectors.
- *Water and Sewer infrastructure*: Design and/or installation of water and sewer extensions to benefit specific target neighborhoods or for specific business sectors

APPENDIX A. SUPPORTING DEMOGRAPHICS AND DATA ANALYSIS

Exhibit A1. Historical Population, City of Enumclaw, 1950-2010

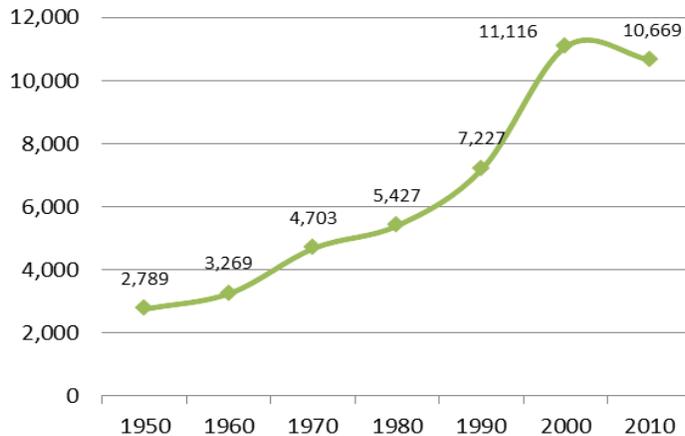


Exhibit A1 illustrates Enumclaw's population growth over the last six decades. Enumclaw's 2010 population was 10,669, down from 11,116 in 2000. The decline in population contrasts with population growth experienced during the previous decade, during which Enumclaw experienced a 4% annual growth rate.

Exhibit A2. Population, City of Enumclaw, 2000-2012

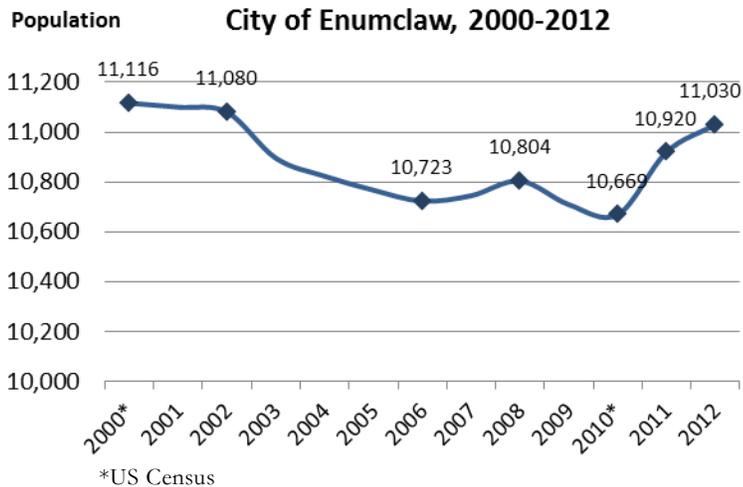


Exhibit A2 illustrates Enumclaw's population change from 2000 to 2012. Some of the more recent growth is a result of annexations from September 2010 to July 2011, which according to the Washington State of Financial Management, included the incorporation of areas with populations totaling 296 people.

Exhibit A3. Housing Units, City of Enumclaw, 2000-2011

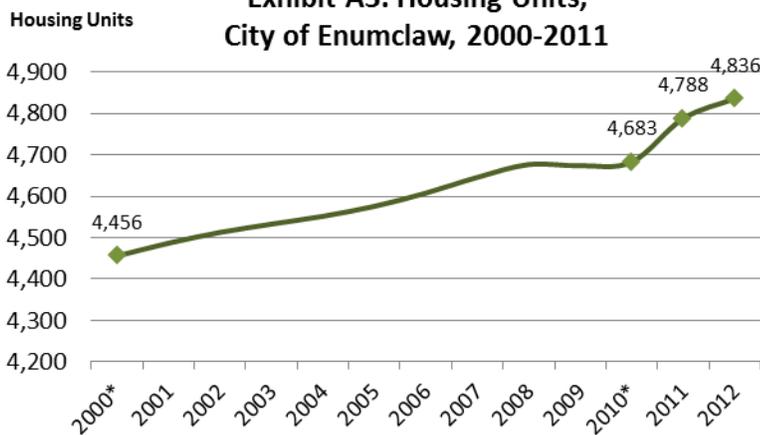


Exhibit A3 describes the total number of housing units within Enumclaw city limits from 2000 to 2012. From 2000 to 2008 Enumclaw added housing units at a relatively steady rate. From 2008 to 2011 the total number of housing units fluctuated, with 105 units added from 2010 to 2011, a majority of which are likely the result of annexations into the City.

Source: Office of Financial Management, 2012.

Exhibit A4. Population, Comparison Cities, 2000-2010

Comparison Cities Population Analysis							
Population Growth	Type	City	County	2000 Census Population	2010 Census Population	2000-2010 CAGR	2010 % of Enumclaw Population
		Study City	Enumclaw	King (Pierce Partial)	11,116	10,669	-0.4%
	Neighbor	Buckley	Pierce	4,145	4,354	0.5%	40.8%
	Neighbor	Bonney Lake	Pierce	9,687	17,374	6.0%	162.8%
	Neighbor	Sumner	Pierce	8,504	9,451	1.1%	88.6%
	Comparable	Snohomish (City)	Snohomish	8,494	9,098	0.7%	85.3%
	Comparable	Port Orchard	Kitsap	7,693	11,157	3.8%	104.6%
	Comparable	Snoqualmie	King	1,631	10,670	20.7%	100.0%
	Larger	Covington	King	13,783	17,575	2.5%	164.7%
	Larger	Woodinville	King	9,809	10,938	1.1%	102.5%
	Larger	Mill Creek	Snohomish	11,525	18,244	4.7%	171.0%
	Larger	Monroe	Snohomish	13,795	17,304	2.3%	162.2%
	County	N/A	King	1,737,046	1,931,249	1.1%	N/A
	County	N/A	Pierce	700,818	795,225	1.3%	N/A

Source: Office of Financial Management, 2012.

Exhibit A5. Group Quarters Population, Comparison Cities, 2000-2010

Comparison Cities Group Quarters Population					
Group Quarters	Type	City	County	2000 Group Quarters	2010 Group Quarters
		Study City	Enumclaw	King (Pierce Partial)	255
	Neighbor	Buckley	Pierce	446	374
	Neighbor	Bonney Lake	Pierce	5	56
	Neighbor	Sumner	Pierce	66	6
	Comparable	Snohomish (City)	Snohomish	417	317
	Comparable	Port Orchard	Kitsap	735	741
	Comparable	Snoqualmie	King	0	0
	Larger	Covington	King	0	30
	Larger	Woodinville	King	23	47
	Larger	Mill Creek	Snohomish	22	5
	Larger	Monroe	Snohomish	1,995	2,609
	County	N/A	King	37,621	37,131
	County	N/A	Pierce	21,508	17,945

Exhibit A6. Housing, Comparison Cities, 2000-2010

Comparison Cities Housing Units Growth						
Type	City	County	2000	2010 Housing	2000-2010 CAGR	2010 % of
			Housing Units	Units		Housing Units
Study City	Enumclaw	King (Pierce Partial)	4,456	4,683	0.5%	100%
Neighbor	Buckley	Pierce	1,472	1,669	1.3%	35.6%
Neighbor	Bonney Lake	Pierce	3,404	6,394	6.5%	136.5%
Neighbor	Sumner	Pierce	3,689	4,279	1.5%	91.4%
Comparable	Snohomish (City)	Snohomish	3,444	3,959	1.4%	84.5%
Comparable	Port Orchard	Kitsap	3,178	4,636	3.8%	99.0%
Comparable	Snoqualmie	King	656	3,761	19.1%	80.3%
Larger	Covington	King	4,473	6,081	3.1%	129.9%
Larger	Woodinville	King	3,900	4,996	2.5%	106.7%
Larger	Mill Creek	Snohomish	4,769	7,923	5.2%	169.2%
Larger	Monroe	Snohomish	4,427	5,306	1.8%	113.3%
County	N/A	King	742,239	851,261	1.4%	N/A
County	N/A	Pierce	277,060	325,375	1.6%	N/A

Comparison Cities Housing Units Occupancy						
Type	City	County	Total	Owner	Percentage	Renter
			Occupied Housing Units			Occupied Units
Study City	Enumclaw	King (Pierce Partial)	4,420	2,819	64%	1,601
Neighbor	Buckley	Pierce	1,591	1,065	67%	526
Neighbor	Bonney Lake	Pierce	5,989	4,897	82%	1,092
Neighbor	Sumner	Pierce	3,980	2,054	52%	1,926
Comparable	Snohomish (City)	Snohomish	3,645	1,934	53%	1,711
Comparable	Port Orchard	Kitsap	4,278	2,389	56%	1,889
Comparable	Snoqualmie	King	3,547	2,970	84%	577
Larger	Covington	King	5,817	4,807	83%	1,010
Larger	Woodinville	King	4,478	2,924	65%	1,554
Larger	Mill Creek	Snohomish	7,551	4,764	63%	2,787
Larger	Monroe	Snohomish	5,024	3,179	63%	1,845
County	N/A	King	789,232	466,718	59%	322,514
County	N/A	Pierce	299,918	189,080	63%	110,838

Comparison Cities Occupied Housing Units Type									
Type	City	County	Total	Single Family	Percentage	Multifamily	Percentage	Other	Percentage
			Occupied Housing Units						
Study City	Enumclaw	King (Pierce Partial)	4,788	3,026	63%	1,274	27%	488	10%
Neighbor	Buckley	Pierce	1,673	1,320	79%	273	16%	80	5%
Neighbor	Bonney Lake	Pierce	6,444	5,422	84%	547	8%	475	7%
Neighbor	Sumner	Pierce	4,280	2,492	58%	1,533	36%	255	6%
Comparable	Snohomish (City)	Snohomish	4,013	2,411	60%	1,545	38%	57	1%
Comparable	Port Orchard	Kitsap	4,780	3,205	67%	1,514	32%	61	1%
Comparable	Snoqualmie	King	3,876	3,340	86%	536	14%	-	0%
Larger	Covington	King	6,107	5,784	95%	249	4%	74	1%
Larger	Woodinville	King	4,997	2,942	59%	1,958	39%	97	2%
Larger	Mill Creek	Snohomish	7,991	5,129	64%	2,854	36%	8	0%
Larger	Monroe	Snohomish	5,326	3,760	71%	1,477	28%	89	2%
County	N/A	King	857,993	496,219	58%	342,847	40%	18,927	2%
County	N/A	Pierce	327,308	220,245	67%	81,069	25%	25,994	8%

Source: Office of Financial Management, 2012, American Community Survey, 5 Year Average, 2010.

Exhibit A7. Covered Employment by Sector, Comparison Cities, 2010

Comparison Cities Employment By Sector 2010											
Type	City	County	Const/Res	FIRE	Manufacturing	Retail	Services	WTU	Government	Education	Total
Study City	Enumclaw	King (Pierce Partial)	196	588	250	665	1,646	131	296	468	4,240
Neighbor	Buckley	Pierce	252	19	45	75	282	35	996	254	1,958
Neighbor	Bonney Lake	Pierce	149	150	18	1,343	1,865	24	215	396	4,161
Neighbor	Sumner	Pierce	2,180	281	1,455	740	1,374	2,086	182	491	8,789
Comparable	Snohomish (City)	Snohomish	465	206	80	1,128	1,677	147	347	557	4,607
Comparable	Port Orchard	Kitsap	179	179	54	1,048	2,408	84	1,068	417	5,437
Comparable	Snoqualmie	King	237	99	622	107	1,069	135	328	406	3,002
Larger	Covington	King	337	93	38	1,363	1,862	32	190	716	4,631
Larger	Woodinville	King	1,682	336	2,043	1,407	4,035	1,368	169	332	11,370
Larger	Mill Creek	Snohomish	293	222	47	863	2,226	88	395	330	4,465
Larger	Monroe	Snohomish	423	174	874	1,116	2,056	206	2,249	672	7,770
County	N/A	King	48,460	64,477	96,873	101,863	533,039	97,343	87,202	70,382	1,099,639
County	N/A	Pierce	16,840	11,705	15,743	30,031	105,079	20,769	35,704	22,406	258,277

Comparison Cities 2010 Employment By Sector Percentage											
Type	City	County	Const/Res	FIRE	Manufacturing	Retail	Services	WTU	Government	Education	Total
Study City	Enumclaw	King (Pierce Partial)	5%	14%	6%	16%	39%	3%	7%	11%	100%
Neighbor	Buckley	Pierce	13%	1%	2%	4%	14%	2%	51%	13%	100%
Neighbor	Bonney Lake	Pierce	4%	4%	0.4%	32%	45%	1%	5%	10%	100%
Neighbor	Sumner	Pierce	25%	3%	17%	8%	16%	24%	2%	6%	100%
Comparable	Snohomish (City)	Snohomish	10%	4%	2%	24%	36%	3%	8%	12%	100%
Comparable	Port Orchard	Kitsap	3%	3%	1%	19%	44%	2%	20%	8%	100%
Comparable	Snoqualmie	King	8%	3%	21%	4%	36%	4%	11%	14%	100%
Larger	Covington	King	7%	2%	1%	29%	40%	1%	4%	15%	100%
Larger	Woodinville	King	15%	3%	18%	12%	35%	12%	1%	3%	100%
Larger	Mill Creek	Snohomish	7%	5%	1%	19%	50%	2%	9%	7%	100%
Larger	Monroe	Snohomish	5%	2%	11%	14%	26%	3%	29%	9%	100%
County	N/A	King	4%	6%	9%	9%	48%	9%	8%	6%	100%
County	N/A	Pierce	7%	5%	6%	12%	41%	8%	14%	9%	100%

Notes: Italicized numbers indicate estimates due to suppression of the applicable data.

Source: Puget Sound Regional Council, 2012.

Exhibit A8. Total Covered Employment, Comparison Cities, 2000-2010

Comparison Cities PSRC Covered Employment Analysis						
Type	City	County	2000 PSRC Covered	2010 PSRC	2000-2010	2010 % of
			Employment	Covered	Employment CAGR	Enumlaw
Study City	Enumclaw	King (Pierce Partial)	4,172	4,240	0.2%	100%
Neighbor	Buckley	Pierce	1,797	1,958	0.9%	46.2%
Neighbor	Bonney Lake	Pierce	1,939	4,161	7.9%	98.1%
Neighbor	Sumner	Pierce	4,915	8,789	6.0%	207.3%
Comparable	Snohomish (City)	Snohomish	3,742	4,607	2.1%	108.7%
Comparable	Port Orchard	Kitsap	4,608	5,437	1.7%	128.2%
Comparable	Snoqualmie	King	1,124	3,002	10.3%	70.8%
Larger	Covington	King	2,632	4,631	5.8%	109.2%
Larger	Woodinville	King	13,352	11,370	-1.6%	268.2%
Larger	Mill Creek	Snohomish	2,998	4,465	4.1%	105.3%
Larger	Monroe	Snohomish	6,823	7,770	1.3%	183.3%
County	N/A	King	1,149,642	1,099,639	-0.4%	N/A
County	N/A	Pierce	234,619	258,277	1.0%	N/A

Source: Puget Sound Regional Council, 2012.

Exhibit A9. Jobs to Housing Ratio, Comparison Cities, 2000-2010

Comparison Cities Jobs to Housing Ratio				
Type	City	County	2000 Jobs to Housing Ratio	2010 Jobs to Housing Ratio
Study City	Enumclaw	King (Pierce Partial)	0.94	0.91
Neighbor	Buckley	Pierce	1.22	1.17
Neighbor	Bonney Lake	Pierce	0.57	0.65
Neighbor	Sumner	Pierce	1.33	2.05
Comparable	Snohomish (City)	Snohomish	1.09	1.16
Comparable	Port Orchard	Kitsap	1.45	1.17
Comparable	Snoqualmie	King	1.71	0.80
Larger	Covington	King	0.59	0.76
Larger	Woodinville	King	3.42	2.28
Larger	Mill Creek	Snohomish	0.63	0.56
Larger	Monroe	Snohomish	1.54	1.46
County	N/A	King	1.55	1.29
County	N/A	Pierce	0.85	0.79

Source: Community Attributes Inc., 2012.

Exhibit A10. Taxable Retail Sales, Comparison Cities, 2000-2011

Comparison Cities Taxable Retail Sales						
Taxable Retail Sales	Type	City	2005 Taxable Retail	2010 Taxable Retail	2011 Taxable	2010 Taxable
			Sales (\$2011)	Sales (\$2011)	Retail Sales	Retail Sales Per Capita (\$2011)
	Study City	Enumclaw	\$230,397,819	\$238,184,196	\$207,351,396	-1.7%
	Neighbor	Buckley	\$52,931,678	\$43,825,315	\$46,908,595	-2.0%
	Neighbor	Bonney Lake	\$283,191,007	\$354,512,430	\$349,721,097	3.6%
	Neighbor	Sumner	\$406,242,569	\$334,637,490	\$352,580,930	-2.3%
	Comparable	Snohomish (City)	\$286,424,941	\$334,788,031	\$326,935,241	2.2%
	Comparable	Port Orchard	\$291,734,257	\$330,726,791	\$311,771,657	1.1%
	Comparable	Snoqualmie	\$147,340,575	\$184,299,798	\$188,183,863	4.2%
	Larger	Covington	\$197,298,848	\$328,983,176	\$339,946,244	9.5%
	Larger	Woodinville	\$685,380,546	\$499,883,566	\$514,180,312	-4.7%
	Larger	Mill Creek	\$210,394,523	\$211,596,216	\$213,441,011	0.2%
	Larger	Monroe	\$399,107,595	\$346,762,362	\$333,453,377	-3.0%
	County	King County	\$45,289,905,666	\$37,634,491,940	\$38,789,855,551	-0.5%
	County	Pierce County	\$12,771,511,703	\$10,339,139,563	\$10,624,265,947	-1.0%

Source: Washington Department of Revenue, 2012, Community Attribute Inc., 2012

Exhibit A11. Age Distribution, Comparison Cities, 2010

Comparison Cities Age Distribution										
Type	City	2010 Total	1 to 19	20 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 and older
Study City	Enumclaw	10,669	2,938	611	1,324	1,327	1,667	1,209	676	917
Neighbor	Buckley	4,354	1,081	286	525	587	682	625	329	239
Neighbor	Bonney Lake	17,374	5,451	851	2,496	2,854	2,809	1,797	683	433
Neighbor	Sumner	9,451	2,543	533	1,266	1,259	1,352	1,091	688	719
Comparable	Snohomish (City)	9,098	2,443	537	1,230	1,293	1,461	1,070	499	565
Comparable	Port Orchard	11,144	2,924	857	1,864	1,384	1,405	1,206	745	759
Comparable	Snoqualmie	10,670	3,860	203	1,616	2,534	1,282	762	302	111
Larger	Covington	17,575	5,622	969	2,287	2,779	3,036	1,777	703	402
Larger	Woodinville	10,938	2,810	553	1,464	1,758	1,794	1,349	592	618
Larger	Mill Creek	18,244	4,638	1,133	2,439	2,557	2,852	2,338	1,217	1,070
Larger	Monroe	17,304	5,029	1,124	3,094	3,157	2,377	1,283	578	662
County	King County	1,931,249	461,892	129,822	312,717	296,790	291,132	228,217	112,747	97,932
County	Pierce County	795,225	220,369	56,203	112,050	108,427	118,943	91,448	48,907	38,878

Type	City	2010 Total	1 to 19	20 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 and older
Study City	Enumclaw	10,669	28%	6%	12%	12%	16%	11%	6%	9%
Neighbor	Buckley	4,354	25%	7%	12%	13%	16%	14%	8%	5%
Neighbor	Bonney Lake	17,374	31%	5%	14%	16%	16%	10%	4%	2%
Neighbor	Sumner	9,451	27%	6%	13%	13%	14%	12%	7%	8%
Comparable	Snohomish (City)	9,098	27%	6%	14%	14%	16%	12%	5%	6%
Comparable	Port Orchard	11,144	26%	8%	17%	12%	13%	11%	7%	7%
Comparable	Snoqualmie	10,670	36%	2%	15%	24%	12%	7%	3%	1%
Larger	Covington	17,575	32%	6%	13%	16%	17%	10%	4%	2%
Larger	Woodinville	10,938	26%	5%	13%	16%	16%	12%	5%	6%
Larger	Mill Creek	18,244	25%	6%	13%	14%	16%	13%	7%	6%
Larger	Monroe	17,304	29%	6%	18%	18%	14%	7%	3%	4%
County	King County	1,931,249	24%	7%	16%	15%	15%	12%	6%	5%
County	Pierce County	795,225	28%	7%	14%	14%	15%	11%	6%	5%

Source: US Census, 2010.

Exhibit A12. Age Race/Ethnicity Distribution, Comparison Cities, 2010

Comparison Cities Race/Ethnicity Distribution, 2010							
Type	City	African American	American Indian and Alaska Natives	Asian	Mixed Races	Ethnically Hispanic	Total Non White
Study City	Enumclaw	0.5%	1%	1%	3%	7%	12%
Neighbor	Buckley	1%	1%	1%	3%	3%	9%
Neighbor	Bonney Lake	1%	1%	2%	5%	6%	15%
Neighbor	Sumner	1%	1%	2%	4%	10%	19%
Comparable	Snohomish (City)	0.5%	1%	2%	3%	8%	15%
Comparable	Port Orchard	3%	1%	6%	6%	7%	23%
Comparable	Snoqualmie	1%	1%	9%	4%	5%	21%
Larger	Covington	4%	1%	8%	6%	9%	29%
Larger	Woodinville	1%	0.4%	11%	4%	7%	24%
Larger	Mill Creek	2%	1%	17%	4%	6%	29%
Larger	Monroe	4%	1%	3%	4%	17%	29%
County	King County	6%	1%	15%	5%	9%	36%
County	Pierce County	7%	1%	6%	7%	9%	30%

Source: American Community Survey, 5 year average, 2012.

Exhibit A13. Foreign Born Residents, Comparison Cities, 2010

Comparison Cities Foreign Born Residents, 2010		
Type	City	% Foreign Born
Study City	Enumclaw	5%
Neighbor	Buckley	1%
Neighbor	Bonney Lake	4%
Neighbor	Sumner	7%
Comparable	Snohomish (City)	7%
Comparable	Port Orchard	6%
Comparable	Snoqualmie	12%
Larger	Covington	10%
Larger	Woodinville	14%
Larger	Mill Creek	20%
Larger	Monroe	9%
County	King County	20%
County	Pierce County	9%

Source: American Community Survey, 5 year average, 2012.

Exhibit A14. Median HH Income, Comparison Cities, 2010

Comparison Cities Median HH Income, 2010		
Type	City	2010 Median HH Income
Study City	Enumclaw	\$56,494
Neighbor	Buckley	\$61,757
Neighbor	Bonney Lake	\$78,103
Neighbor	Sumner	\$50,943
Comparable	Snohomish (City)	\$54,431
Comparable	Port Orchard	\$50,275
Comparable	Snoqualmie	\$116,020
Larger	Covington	\$84,323
Larger	Woodinville	\$88,221
Larger	Mill Creek	\$86,461
Larger	Monroe	\$67,988
County	King County	\$68,065
County	Pierce County	\$57,869

Source: American Community Survey, 5 year average, 2012.