



Local Retail Opportunities: Arlington WA Retail Trade Area

Centering on Arlington's downtown, the city's primary retail trade area extends north along I-5 from Smokey Point to the intersection with Stanwood-Bryant Road. At that point the area continues along a diagonal to the northeast, encompassing all of Lake Cavanaugh, to a point northeast of Darrington. From there the area extends directly south, taking in all of Darrington, and then west and southwest back to Smokey Point, staying well north of Granite Falls and North Marysville.

A [map](#) of Arlington's primary retail trade area is pictured on the last page of this report, in [Appendix 1](#).

The source of these demographics is Nielsen Claritas, as of April 2012. For further information contact Arlington's Community Development Director, David Kuhl, at 360-403-3445, or dkuhl@arlingtonwa.gov.

This report uses comparison is based on 2011 estimation of consumer demand from the US Consumer Expenditure Survey conducted by the US Bureau of Labor Statistics, and on 2011 estimation of retail supply from the US Census of Retail Trade conducted by the US Census Bureau. The codes in the table are North American Industry Classification System (NAICS) codes (for example, "Automotive Dealers" = code 4411). [Appendix 2](#) provides further background information.

Shown in the table is the difference between demand and supply, which can represent an opportunity ("leakage") or an oversupply for each general type of retail outlet in Arlington Retail Trade Area. Actual opportunities may also depend on such factors as brand strength, other competitors such as Internet sites, proximity of distribution centers, major big-box malls, "auto rows," and outlet malls. Actual trade areas for more specific retail categories and especially for individual stores can vary considerably. Nonetheless, the following data can be a useful starting point in identifying good potential for retail development in the Arlington Retail Trade Area.

In the data, when the demand appears to be much greater than the supply, the apparent opportunity is noted in **blue** for the given type of retail outlet. A negative value signifies oversupply. A relatively large number in blue signifies what may be a major retail opportunity for developing new retail sales in Arlington Retail Trade Area for this category – these apparent major opportunities are shown with a **blue asterisk** in the far right column.

Key findings: There may be significant opportunities for retail development in Arlington Retail Trade Area for the several categories highlighted in **green** and with an asterisk in the right-hand column.

Retail Stores in Arlington Primary Retail Trade Area	2011 Demand (Arlington Retail Trade Area Resident Expenditures)	2011 Supply (Arlington Retail Trade Area Retail Sales)	Opportunity (pos. numbers) or not	* Apparent Major Retail Opportunity
Total Retail Sales incl. Eating Drinking Places	589,830,740	634,794,093	-44,963,353	
Motor Vehicle and Parts Dealers-441	110,636,685	105,267,425	5,369,260	
Automotive Dealers-4411	97,386,235	48,355,375	49,030,860	*
Other Motor Vehicle Dealers-4412	5,887,803	42,522,320	-36,634,517	
Automotive Parts/Accsrs., Tire Stores-4413	7,362,647	14,389,729	-7,027,082	
Furniture and Home Furnishings Stores-442	11,304,814	9,333,002	1,971,812	
Furniture Stores-4421	6,007,486	3,777,945	2,229,541	
Home Furnishing Stores-4422	5,297,328	5,555,057	-257,729	
Electronics and Appliance Stores-443	12,685,990	8,109,777	4,576,213	
Appliances, TVs, Electronics Stores-44311	9,419,424	4,650,367	4,769,057	*
Household Appliances Stores-443111	2,242,732	3,797,635	-1,554,903	

Retail Stores in Arlington Primary Retail Trade Area, cont'd.	2011 Demand (Arlington Retail Trade Area Resident Expenditures)	2011 Supply (Arlington Retail Trade Area Retail Sales)	Opportunity (pos. numbers) or not	* Apparent Major Retail Opportunity
Electronics and Appliance Stores-443, cont'd.				
Radio, Television, Electronics Stores-443112	7,176,692	852,732	6,323,960	*
Computer and Software Stores-44312	2,675,598	3,459,410	-783,812	
Camera and Photographic Equipment Stores-44313	590,968	0	590,968	
Building Material, Garden Equip Stores-444	52,464,098	81,712,011	-29,247,913	
Building Material and Supply Dealers-4441	47,525,075	78,573,698	-31,048,623	
Home Centers-44411	19,037,725	19,516,855	-479,130	
Paint and Wallpaper Stores-44412	1,155,362	1,832,683	-677,321	
Hardware Stores-44413	4,765,331	5,690,960	-925,629	
Other Building Materials Dealers-44419	22,566,656	51,533,200	-28,966,544	
Building Materials, Lumberyards-444191	8,812,945	20,149,482	-11,336,537	
Lawn, Garden Equipment, Supplies Stores-4442	4,939,024	3,138,313	1,800,711	
Outdoor Power Equipment Stores-44421	701,664	716,130	-14,466	
Nursery and Garden Centers-44422	4,237,360	2,422,183	1,815,177	*
Food and Beverage Stores-445	79,511,362	96,420,190	-16,908,828	
Grocery Stores-4451	72,692,181	91,050,486	-18,358,305	
Supermarkets, Grocery (Ex Conv) Stores-44511	69,107,440	86,193,128	-17,085,688	
Convenience Stores-44512	3,584,741	4,857,358	-1,272,617	
Specialty Food Stores-4452	2,330,415	2,048,938	281,477	
Beer, Wine and Liquor Stores-4453	4,488,767	3,320,766	1,168,001	*
Health and Personal Care Stores-446	30,190,821	64,561,404	-34,370,583	
Pharmacies and Drug Stores-44611	25,914,806	63,509,781	-37,594,975	
Cosmetics, Beauty Supplies, Perfume Stores-44612	1,059,716	0	1,059,716	*
Optical Goods Stores-44613	1,268,032	429,137	838,895	
Other Health and Personal Care Stores-44619	1,948,268	622,486	1,325,782	*
Gasoline Stations-447	59,039,052	81,917,436	-22,878,384	
Gasoline Stations With Conv Stores-44711	44,077,128	75,311,928	-31,234,800	
Other Gasoline Stations-44719	14,961,925	6,605,508	8,356,417	*
Clothing, Clothing Accessories Stores-448	26,188,595	5,376,352	20,812,243	
Clothing Stores-4481	18,868,134	4,777,837	14,090,297	*
Men's Clothing Stores-44811	1,202,542	516,694	685,848	*
Women's Clothing Stores-44812	4,720,665	669,080	4,051,585	*
Children's, Infants' Clothing Stores-44813	1,121,132	288,692	832,440	*
Family Clothing Stores-44814	10,126,684	3,161,893	6,964,791	*
Clothing Accessories Stores-44815	448,129	0	448,129	*
Other Clothing Stores-44819	1,248,982	141,478	1,107,504	*
Shoe Stores-4482	3,653,960	228,925	3,425,035	*
Jewelry, Luggage, Leather Goods Stores-4483	3,666,501	369,590	3,296,911	*
Jewelry Stores-44831	3,366,647	369,590	2,997,057	*
Luggage and Leather Goods Stores-44832	299,853	0	299,853	

Retail Stores in Arlington Primary Retail Trade Area, cont'd.	2011 Demand (Arlington Retail Trade Area Resident Expenditures)	2011 Supply (Arlington Retail Trade Area Retail Sales)	Opportunity (pos. numbers) or not	* Apparent Major Retail Opportunity
Sporting Goods, Hobby, Book, Music-451	11,197,147	6,655,279	4,541,868	*
Sporting Goods, Hobby, Musical Inst Stores-4511	7,681,462	5,678,336	2,003,126	*
Sporting Goods Stores-45111	3,777,361	3,825,995	-48,634	
Hobby, Toys and Games Stores-45112	2,456,765	0	2,456,765	*
Sew/Needlework/Piece Goods Stores-45113	689,377	1,580,837	-891,460	
Musical Instrument and Supplies Stores-45114	757,959	271,504	486,455	*
Book, Periodical and Music Stores-4512	3,515,686	976,943	2,538,743	*
Book Stores and News Dealers-45121	2,394,129	416,400	1,977,729	*
Book Stores-451211	2,265,564	416,400	1,849,164	*
News Dealers and Newsstands-451212	128,564	0	128,564	*
Prerecorded Tapes, CDs, Record Stores-45122	1,121,557	560,543	561,014	*
News Dealers and Newsstands-451212				
General Merchandise Stores-452	75,935,378	46,125,280	29,810,098	*
Department Stores Excl Leased Depts-4521	36,069,324	30,780,843	5,288,481	
Other General Merchandise Stores-4529	39,866,054	15,344,437	24,521,617	*
Miscellaneous Store Retailers-453	15,379,204	9,100,078	6,279,126	*
Florists-4531	1,109,682	189,160	920,522	*
Office Supplies, Stationery, Gift Stores-4532	5,950,406	2,499,873	3,450,533	*
Office Supplies and Stationery Stores-45321	3,377,495	1,302,259	2,075,236	*
Gift, Novelty and Souvenir Stores-45322	2,572,911	1,197,614	1,375,297	*
Used Merchandise Stores-4533	1,255,263	1,632,154	-376,891	*
Other Miscellaneous Store Retailers-4539	7,063,854	4,778,890	2,284,964	*
Non-Store Retailers-454	42,320,156	75,955,693	-33,635,537	
Foodservice and Drinking Places-722	62,977,436	44,260,166	18,717,270	*
Full-Service Restaurants-7221	28,321,693	19,606,597	8,715,096	
Limited-Service Eating Places-7222	26,709,217	16,206,952	10,502,265	*
Special Foodservices-7223	5,226,882	5,344,282	-117,400	
Drinking Places -Alcoholic Beverages-7224	2,719,643	3,102,334	-382,691	
GAFO **	143,262,330	78,099,564	65,162,766	*
General Merchandise Stores-452	75,935,378	46,125,280	29,810,098	*
Clothing and Clothing Accessories Stores-448	26,188,595	5,376,352	20,812,243	*
Furniture and Home Furnishings Stores-442	11,304,814	9,333,002	1,971,812	
Electronics and Appliance Stores-443	12,685,990	8,109,777	4,576,213	*
Sporting Goods, Hobby, Book, Music Stores-451	11,197,147	6,655,279	4,541,868	*
Office Supplies, Stationery, Gift Stores-4532	5,950,406	2,499,873	3,450,533	*

** Note: "GAFO" (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

Appendix 2: Data Sources

As noted above, the data for the 2012 Nielsen Retail Market Power database, the basis of this report, are derived from two major sources. The demand data is derived from the Consumer Expenditure (CEX) Survey, which is fielded by the U.S. Bureau of Labor Statistics. The supply data is derived from the Census of Retail Trade, which is made available by the U.S. Census. Additional data sources are incorporated to create both supply and demand estimates.

Consumer Expenditure Survey

The CEX, which consists of two surveys (the quarterly interview survey and the diary survey), provides information on the buying habits of American consumers, including their expenditures, income, and consumer unit (families and single consumers) characteristics. The surveys target the total non-institutionalized population (urban and rural) of the United States. The data is collected from the independent quarterly interview and weekly diary surveys of approximately 7,500 sample households. Each survey has its own independent sample, and each collects data on household income and socioeconomic characteristics.

The interview survey includes monthly out-of-pocket expenditures, such as housing, apparel, transportation, health care, insurance, and entertainment. The diary survey includes weekly expenditures of frequently purchased items, such as food and beverages, tobacco, personal care products, and nonprescription drugs and supplies.

Census of Retail Trade

Census of Retail Trade data for retail stores were gathered through a combination of questionnaires, which were sent to all but the smallest firms, and the administrative records of other Federal agencies. There are 36 variants of the census questionnaire, permitting each kind of business to answer in terms of categories relevant to its operations. Questionnaires were mailed to all firms above a certain size cutoff, and to a sample of smaller firms with paid employees. Information for firms with no employees and for small firms not in the sample was obtained from Federal administrative records.

The Census Bureau also conducts monthly and annual retail trade surveys to obtain more current data. These surveys are based on samples of firms with employees identified in the Census of Retail Trade, supplemented with samples of non-employers and recent "births" (newly created firms) identified from administrative records during the years between 5-year retail censuses. Most of the data are obtained by mail. These surveys concentrate on a much narrower set of data items than the retail census – that is, monthly and annual sales, monthly and year-end inventories, and inventory/sales ratios.

The Retail Trade sector (sector 44-45) includes establishments engaged in retailing merchandise, and rendering services incidental to the sale of merchandise. Retailers are establishments organized to sell merchandise in small quantities to the general public.

In addition, this sector includes industries previously classified in Wholesale Trade that sold merchandise, using facilities open to the general public. Prominent examples of these are automotive supplies dealers, computer and peripheral equipment merchants, office supplies dealers, farm supplies dealers, and building materials dealers.