



Retail Store Opportunities: Primary Retail Trade Area For City of Bonney Lake, WA – Zip Code Area 98391

This report indicates current opportunities for further retail development in Bonney Lake, Washington's primary retail trade area, considered by city government officials as the zip code area in which the city is located (see [map](#), [Appendix 1](#)). The data source is Nielsen Claritas as of July 2012. Further information is available through City Administrator Don Morrison, 253-447-4307, morrisond@ci.bonney-lake.wa.us.

These tables provide comparisons based on 2012 estimation of consumer demand from the US Consumer Expenditure Survey conducted by the US Bureau of Labor Statistics, and on 2012 estimation of retail supply from the US Census of Retail Trade conducted by the US Census Bureau. Using proprietary methods, Nielsen Claritas analysts allocate the data down to the census block group level, and then develop estimates for larger areas, in this case the entire zip code area.

The codes in the tables below are North American Industry Classification System (NAICS) codes – see www.census.gov/eos/www/naics. [Appendix 2](#) provides further background information.

Shown in the tables is the difference between demand and supply. When there is more demand than local supply and residents thus buy elsewhere, this "leakage" can indicate a retail opportunity locally. Actual opportunities may also depend on such factors as scale, brand strength, other competitors such as Internet sites, proximity of distribution centers and major big-box malls, and outlet malls. Actual trade areas for specific retail categories and especially for individual stores can vary considerably.

In the data, when the demand appears to be much greater than the supply, the apparent opportunity is noted in blue for the given retail outlet. A positive number in blue suggests what may be an opportunity for developing new retail sales for this category. A negative value signifies oversupply. In addition, [major opportunities at the 4+ digit code level](#) are given a [blue asterisk](#) in the far right column.

Key findings for Table 1: There appear to be major opportunities for retail development in the Bonney Lake area in Motor Vehicles and Parts, Furniture and Home Furnishings, and Electronics and Appliances.

Table 1

Retail Stores in Zip Code Area 98391	2012 Demand (Bonney Lake Resident Expenditures)	2012 Supply (Bonney Lake Retail Sales)	Opportunity (pos. numbers) or not	* Significant Retail Opportunity
Total Retail Sales incl. Eating Drinking Places	826,584,606	416,994,180	409,590,426	
Motor Vehicle and Parts Dealers-441	164,712,310	14,703,242	150,009,068	
Automotive Dealers-4411	144,888,781	1,610,394	143,278,387	*
Other Motor Vehicle Dealers-4412	9,340,357	6,291,610	3,048,747	*
Automotive Parts/Accsrs., Tire Stores-4413	10,483,172	6,801,238	3,681,934	*
Furniture and Home Furnishings Stores-442	16,994,245	1,103,843	15,890,402	
Furniture Stores-4421	9,220,063	367,660	8,852,403	*
Home Furnishing Stores-4422	7,774,182	736,183	7,037,999	*
Electronics and Appliance Stores-443	18,474,903	5,343,480	13,131,423	
Appliances, TVs, Electronics Stores-44311	13,704,173	2,701,217	11,002,956	*
Household Appliances Stores-443111	3,265,610	1,203,804	2,061,806	*
Radio, Television, Electronics Stores-443112	10,438,563	1,497,413	8,941,150	*
Computer and Software Stores-44312	3,883,308	2,642,263	1,241,045	*
Camera and Photographic Equipment Stores-44313	887,422	0	887,422	*

Key findings for Table 2: There appear to be major opportunities for retail development in the Bonney Lake area for the store categories noted with a blue asterisk in the right-hand column: several components of Building Materials and Garden Equipment stores, and all components of Food and Beverage, Health and Personal Care, Gasoline Stations (both subcodes), and Clothing and Clothing Accessories stores.

Table 2

Retail Stores in Zip Area 98391, cont'd.	2011 Demand (Bonney Lake Resident Expenditures)	2011 Supply (Bonney Lake Retail Sales)	Opportunity (pos. numbers) or not	* Significant Retail Opportunity
Building Material, Garden Equip Stores-444	76,797,792	80,431,323	-3,633,531	
Building Material and Supply Dealers-4441	69,675,719	80,352,507	-10,676,788	
Home Centers-44411	27,865,513	72,502,513	-44,637,000	
Paint and Wallpaper Stores-44412	1,726,795	1,581,401	145,394	
Hardware Stores-44413	6,866,987	0	6,866,987	*
Other Building Materials Dealers-44419	33,216,424	6,268,593	26,947,831	*
Building Materials, Lumberyards-444191	12,688,591	2,451,021	10,237,570	*
Lawn, Garden Equipment, Supplies Stores-4442	7,122,073	78,816	7,043,257	*
Outdoor Power Equipment Stores-44421	1,106,066	0	1,106,066	*
Nursery and Garden Centers-44422	6,016,007	78,816	5,937,191	*
Food and Beverage Stores-445	104,801,600	85,659,514	19,142,086	
Grocery Stores-4451	95,608,792	82,459,627	13,149,165	*
Supermarkets, Grocery (Ex Conv) Stores-44511	90,948,322	82,178,110	8,770,212	*
Convenience Stores-44512	4,660,470	281,517	4,378,953	*
Specialty Food Stores-4452	3,064,508	119,554	2,944,954	*
Beer, Wine and Liquor Stores-4453	6,128,300	3,080,333	3,047,967	*
Health and Personal Care Stores-446	39,837,161	8,786,888	31,050,273	
Pharmacies and Drug Stores-44611	34,040,191	6,959,688	27,080,503	*
Cosmetics, Beauty Supplies, Perfume Stores-44612	1,388,121	413,834	974,287	*
Optical Goods Stores-44613	1,856,347	1,183,344	673,003	*
Other Health and Personal Care Stores-44619	2,552,502	230,022	2,322,480	*
Gasoline Stations-447	77,565,037	39,229,198	38,335,839	
Gasoline Stations With Conv Stores-44711	57,740,192	30,561,672	27,178,520	*
Other Gasoline Stations-44719	19,824,845	8,667,526	11,157,319	*
Clothing, Clothing Accessories Stores-448	38,781,083	2,932,647	35,848,436	
Clothing Stores-4481	27,773,109	593,237	27,179,872	*
Men's Clothing Stores-44811	1,784,169	0	1,784,169	*
Women's Clothing Stores-44812	7,047,227	92,148	6,955,079	*
Children's, Infants' Clothing Stores-44813	1,555,271	0	1,555,271	*
Family Clothing Stores-44814	14,866,066	0	14,866,066	*
Clothing Accessories Stores-44815	676,650	436,999	239,651	*
Other Clothing Stores-44819	1,843,726	64,090	1,779,636	*
Shoe Stores-4482	5,173,069	1,529,732	3,643,337	*
Jewelry, Luggage, Leather Goods Stores-4483	5,834,905	809,678	5,025,227	*
Jewelry Stores-44831	5,397,460	809,678	4,587,782	*
Luggage and Leather Goods Stores-44832	437,445	0	437,445	*

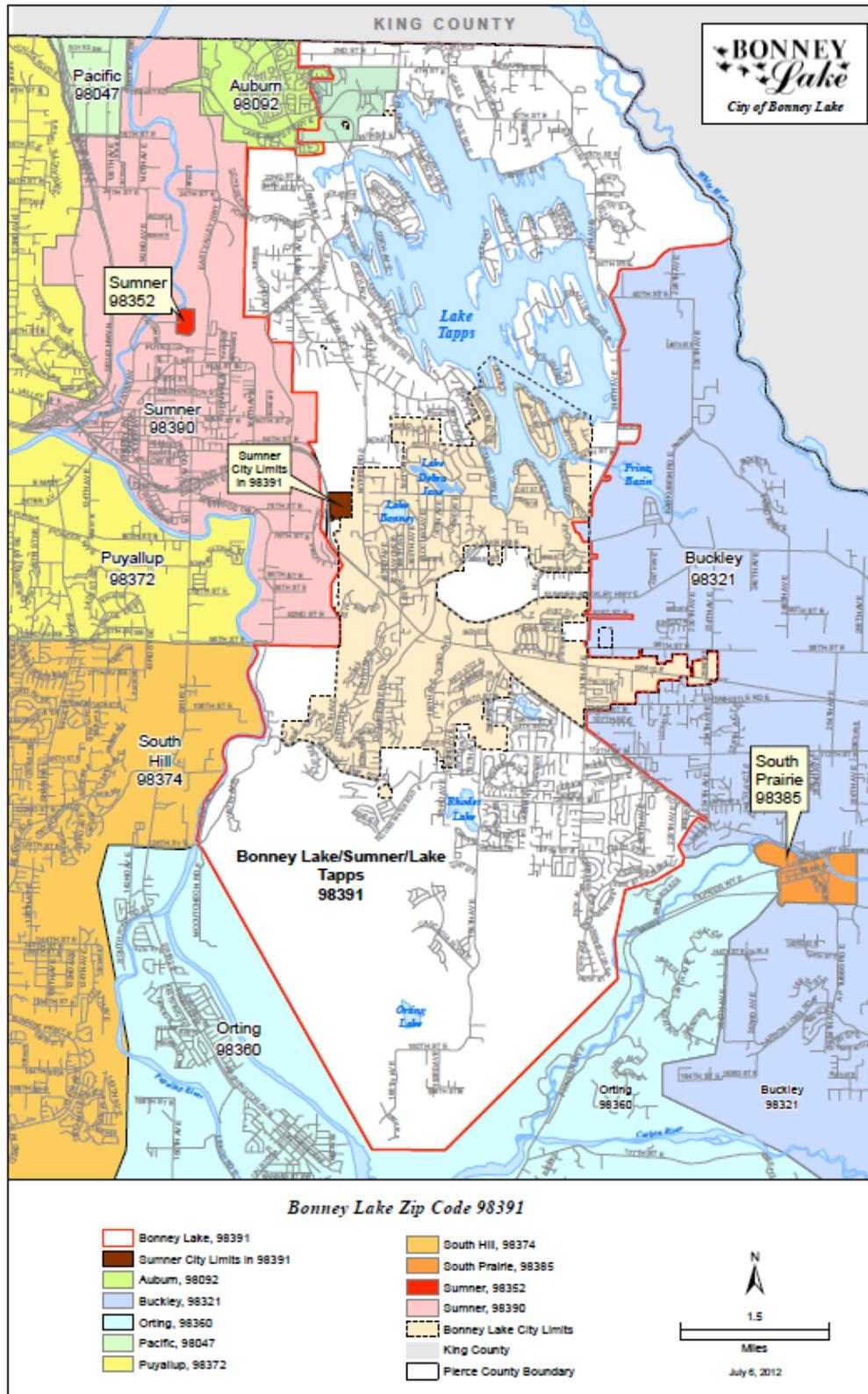
Key Findings for Table 3: The data show major opportunities in almost all 4+ digit sectors except the 4-digit NAICS-code for Department Stores, the 5-digit level of Office Supplies and Stationery Stores. GAFO 3-digit codes are included, indicating a "non-opportunity" for Clothing and Clothing Accessories Stores.

Table 3

Retail Stores in Zip Area 98391, cont'd.	2011 Demand (Bonney Lake Retail Trade Area Resident Expenditures)	2011 Supply (Bonney Lake Retail Trade Area Retail Sales)	Opportunity (pos. numbers) or not	* Significant Retail Opportunity
Sporting Goods, Hobby, Book, Music-451	16,515,708	3,803,871	12,711,837	
Sporting Goods, Hobby, Musical Inst Stores-4511	11,430,076	1,450,648	9,979,428	*
Sporting Goods Stores-45111	5,799,429	170,190	5,629,239	*
Hobby, Toys and Games Stores-45112	3,497,806	1,280,458	2,217,348	*
Sew/Needlework/Piece Goods Stores-45113	982,911	0	982,911	*
Musical Instrument and Supplies Stores-45114	1,149,930	0	1,149,930	*
Book, Periodical and Music Stores-4512	5,085,632	2,353,223	2,732,409	*
Book Stores and News Dealers-45121	3,419,466	763,009	2,656,457	*
Book Stores-451211	3,246,261	763,009	2,483,252	*
News Dealers and Newsstands-451212	173,205	0	173,205	*
Prerecorded Tapes, CDs, Record Stores-45122	1,666,166	1,590,214	75,952	*
General Merchandise Stores-452	105,257,759	109,029,169	-3,771,410	
Department Stores Excl Leased Depts-4521	51,397,879	88,468,994	-37,071,115	
Other General Merchandise Stores-4529	53,859,880	20,560,175	33,299,705	*
Miscellaneous Store Retailers-453	21,177,412	10,299,145	10,878,267	
Florists-4531	1,635,912	150,174	1,485,738	*
Office Supplies, Stationery, Gift Stores-4532	8,555,020	6,245,657	2,309,363	*
Office Supplies and Stationery Stores-45321	4,889,495	4,893,537	-4,042	
Gift, Novelty and Souvenir Stores-45322	3,665,525	1,352,120	2,313,405	*
Used Merchandise Stores-4533	1,845,421	205,385	1,640,036	*
Other Miscellaneous Store Retailers-4539	9,141,059	3,697,929	5,443,130	*
Non-Store Retailers-454	59,255,907	6,179,848	53,076,059	
Foodservice and Drinking Places-722	86,413,689	49,492,012	36,921,677	
Full-Service Restaurants-7221	38,972,998	19,291,932	19,681,066	*
Limited-Service Eating Places-7222	36,576,094	28,368,277	8,207,817	*
Special Foodservices-7223	7,170,959	843,804	6,327,155	*
Drinking Places -Alcoholic Beverages-7224	3,693,638	987,999	2,705,639	*
GAFO **	204,578,718	128,458,667	76,120,051	*
General Merchandise Stores-452	105,257,759	109,029,169	-3,771,410	
Clothing and Clothing Accessories Stores-448	38,781,083	2,932,647	35,848,436	*
Furniture and Home Furnishings Stores-442	16,994,245	1,103,843	15,890,402	*
Electronics and Appliance Stores-443	18,474,903	5,343,480	13,131,423	*
Sporting Goods, Hobby, Book, Music Stores-451	16,515,708	3,803,871	12,711,837	*
Office Supplies, Stationery, Gift Stores-4532	8,555,020	6,245,657	2,309,363	*

** 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 1: Bonney Lake, WA Retail Trade Area – Zip Area 98391



Appendix 2: Research Methods

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 Bureau. 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.