



PATEROS DOWNTOWN MARKET STUDY

Public Participation & Research Summary

December 11, 2023 w/ January 17, 2024 Updates

DOWNTOWN MARKET STUDY PURPOSE

- The infrastructure around the Pateros Mall needs to be replaced
 - Study will guide what the new surface will entail
 - What do the local businesses and community want to see
- How to increase economic activity on the Mall
 - What is needed for a successful market
 - What other business opportunities the City should be looking at
- Study will provide the planning necessary to be competitive for future grant applications to fund construction.

QUESTIONS TO BE ANSWERED IN THE CITY OF PATEROS DOWNTOWN MARKET STUDY

- What do the local businesses and community want to see?
 - Vision?
- How to increase economic activity on the Mall?
 - What infrastructure would be useful as a multifunctional space?
 - Mall events, trade shows, market fairs?
- What is needed for a successful market?
 - Where should it be located and how should it be laid out?
 - What infrastructure is needed?
 - Access for vendors and the public?
- What other business opportunities should the city be looking at?
 - Permanent rentable/leasable spaces?
 - Food vendors?
 - Banking kiosk?
 - Retail sales and market goods?
- Other opportunities?
- Mall/market coordinator?

HUMAN

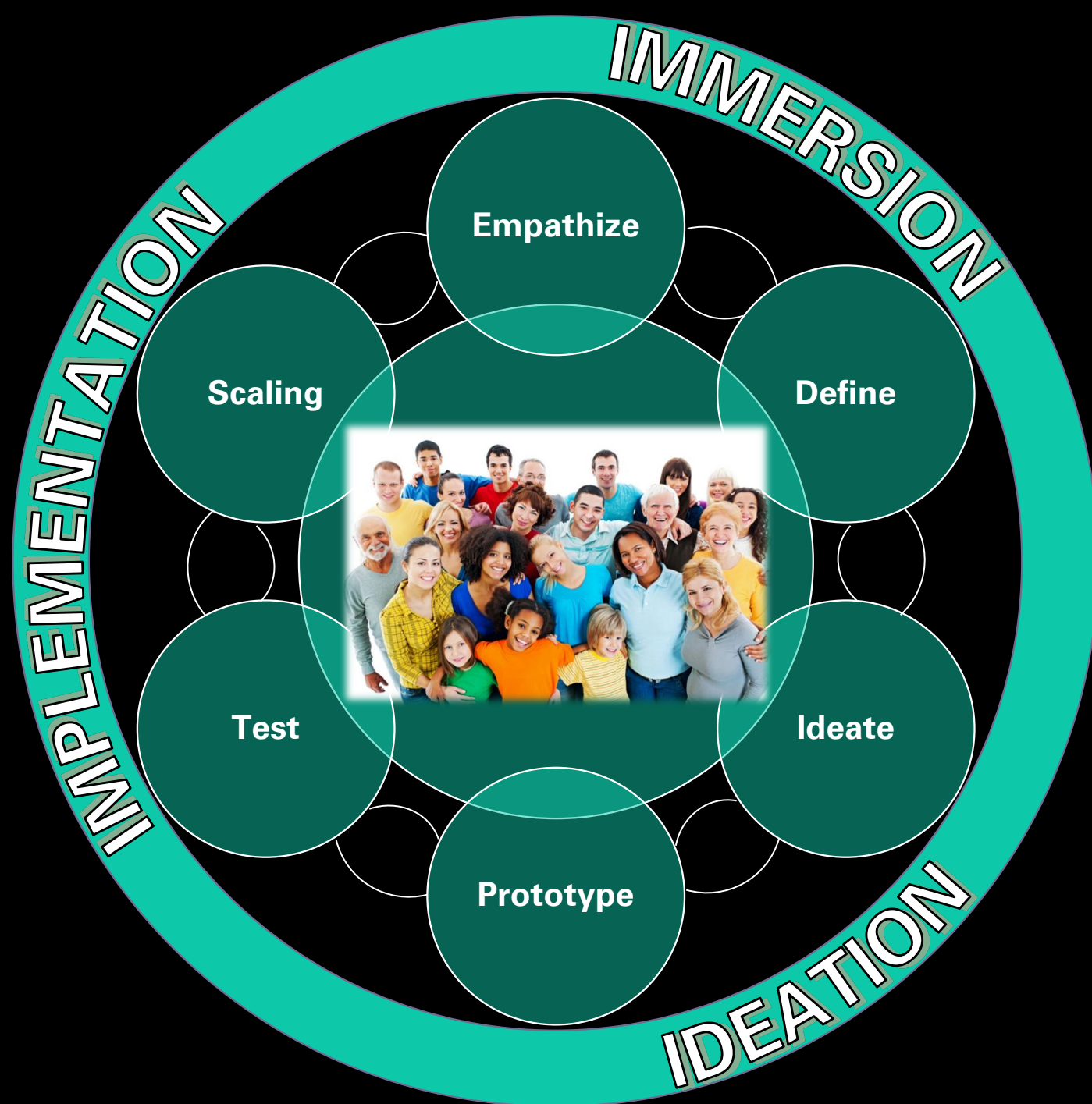
CENTRIC

Design

Thinking

ITERATIVE

PROCESS



PATEROS DOWNTOWN MARKET STUDY – DESIGN THINKING PROCESS

STAGES/PHASES OF DESIGN THINKING

1. **Empathize** – public participation (surveys, interviews), background, & research
2. **Define** – summarize feedback & prepare problem/opportunity statement(s)
3. **Ideate** – present summary & statement(s) to focus group for feedback
4. **Prototype** – w/ SPVV concepts
 - Design charrette w/ project team
5. **Test** – Feedback on SPVV concepts & draft downtown market study
 - Present to focus group
 - Public meeting presentation (*focus group attendance encouraged*)
6. **Implement** – Finalize Downtown Market Study
 - Present to City Council (*focus group attendance encouraged*)

Design thinking shifts the mindset of problem-solving from solution-focused to problem-focused, with attention to the user experience



2023 PUBLIC PARTICIPATION OPPORTUNITIES

- Information Booth at Pateros Community Market & Hydro Races w/ Community Survey Kickoff
- Community Survey – August to October 2023
 - 73 Responses
- Business Survey – September to October 2023
 - 1 Response
- Interviews – August to November 2023
 - City Council Park & Street Committee
 - Community Market Committee Member
 - City Building Inspector
 - Pateros Librarian
 - Economic Alliance Executive Director
- Focus Group
 - Public Participation & Research Summary – December 2023
 - Design Concepts – Winter 2024
 - Draft Downtown Market Study – Spring 2024
- Draft & Final Market Study Presentations (April/May 2024)



PATEROS MALL



**VISION? ECONOMIC OPPORTUNITIES?
EVENTS? INFRASTRUCTURE? AMENITIES?**

HELP US PLAN FOR THE FUTURE!



SCAN ME

GIVE US YOUR OPINIONS



BACKGROUND RESEARCH

- City of Pateros Demographics
- Previous Planning & Design 2014-2022
 - WSU Students 2015
 - 2016 Downtown Business District Improvement Plan
 - 2020 Roundtables
 - Design Proposals / Plans
- Grant Applications
- Location & Real Estate Research
- Current / Proposed Projects
- Economic Alliance Information
- Pateros Relocation Guide 2020
- 2023 APJ Event Survey...

PROJECT HISTORY

2015

PATEROS WELCOME CENTER TO THE PATEROS MALL & THE GATEWAY TO THE CHELAN

PATEROS POP-UP MARKET Mayor Introduction

Pop-Up Market Roundtable Meetings

| | | |
|---|--|---|
| <p>Meeting #1 12/1/2020 @7PM AGENDA Market Concept City Facilities & Investment Community Discussion</p> | <p>Meeting #2 12/8/2020 @7PM AGENDA Local Businesses Impacts & Concerns Opportunities & Challenges Community Discussion</p> | <p>Meeting #3 12/15/2020 @7PM AGENDA Interested Businesses Market Themes & Ideas Hiring a Coordinator Community Discussion</p> |
|---|--|---|

PLEASE FILL OUT THE SURVEY: Pateros.com (Commerce Tab)

EVERYONE WELCOME

COMMERCIAL AVENUE STORMWATER LANDSCAPES AND SIGNAGE

PATEROS 2023 APPLE PIE JAMBOREE EVENT SURVEY



Proposed
ROUNDBABOUT

OVERFLOW
PARKING

MARINA

Further develop Ives Landing RV Park with a 50 slip marina

MAKE CONNECTIONS TO NORTH END OF TOWN
Make safe pedestrian connections to industrial area and Pederson Road Neighborhood.

SCULPTURE

Collaborate with local artists to create way-finding markers and public art to reshape Pateros' identity

IMPROVE PEDESTRIAN ACCESS

Increase pedestrian safety and activity by connecting residential areas and recreation areas to the downtown district

NARROW LAKESHORE DRIVE

Add landscaping and trees, use diagonal parking. Strategically place RV Parking along park to keep views to lake open from business district.

PERFORMANCE ARTS AND HOSPITALITY

Create a green plaza using lawn, trees, and landscaping. Provide area and facility for performance arts and grill and kitchen space for events.

PARK PLAZA (more green, less pavement)

Improve event space, while improving amenities for daily use and small groups. Make a direct connection with park and mall. Redesign parking to keeping access to mall, post office, and other businesses.

CAPTURING VIEW FROM HIGHWAY

Entice travelers driving north on Highway 97 to come to downtown and investigate a large visual attraction, like giant sculpture or structure, while there, discover the other venues available to them.

CONNECTING THE MALL

Create a more attractive terminus to the mall. Use flags, sculpture, or landscaping to define a point of entry for the mall that is visible from the highway. Improve pedestrian connections and way-finding to mall from residential district and park.

WELCOME GUIDE CONNECTING TO THE MALL
Create visual cues with landscaping and hardscape as a welcome point of entry for people to connect from parking area to the mall. Identify pedestrian connections from parking area along railroad tracks to mall, and to the park, and to trail system

IMPROVE AESTHETICS WITH LANDSCAPING AND SCULPTURE

Proposed
ROUNDBABOUT

Pateros

CONNECT SOUTH END BUSINESS TO THE MALL
Improve the pedestrian connection to the mall with sidewalks and way-finding to encourage and increase pedestrian activity between business's



2016 DOWNTOWN BUSINESS
DISTRICT IMPROVEMENT
PLAN

City of Pateros
113 Lakeshore Drive
Pateros, WA 98846



2014-2020 BUSINESS & COMMUNITY

ECONOMIC DEVELOPMENT ACTION PLAN

- Connect riverfront Park with downtown businesses with more green and less pavement
 - *Riverview Pavillion 2020 (City of Pateros)*
 - *Memorial Park to Ives Landing Park Trail Connection 2022 (Douglas County PUD)*
- Sell last of vacant lots to developer
 - *7 Unit Mixed Use Complex (permit review in process)*
- Re-configure parking and Lakeshore Drive to enhance businesses
 - *Parking re-configuration in preliminary stages*
- Capture interest from US-97 with Methow Memorial
 - *Monument installed*



CITY OF PATEROS ECONOMIC DEVELOPMENT GOALS

1. Use City owned land as an economic development tool.
2. Encourage development of “thriving commercial image” in the Business District to benefit the entire community.
3. Meet basic needs for residents – food, household goods, services, new job opportunities
4. Emphasize physical and visual access from commercial activities to the riverfront
5. Maximize cultural heritage and history as a magnet for attraction of commercial support for Pateros; Develop character of riverfront City
6. Encourage regional partnerships and cooperation relationships with appropriate local, state, tribal, nongovernmental federal entities
7. Develop the concept of Gateway or Basecamp as part of an introduction to the Methow-Columbia-Okanogan region
8. Make Pateros a focal point for events and entertainment in an expanded Memorial Park

EXAMPLE / CASE STUDY RESEARCH

- Retail Trends / Top 10 Lists / Outdoor Malls / Pateros Research
 - “Twin Cities suburban outdoor shopping centers are hot, even in the cold”
 - <https://bestthingswa.com/pateros-wa> (nothing listed in Pateros)
- EPA - How Small Towns and Cities Can Use Local Assets To Rebuild Their Economies: Lessons From Successful Places
- Downtown Revitalization in Small and Mid Size Cities
- Lee's Summit, Missouri – Downtown Market Plaza
- Downtown Market - Grand Rapids, Michigan
- Kings Park Downtown – Smithtown, NY
- Western Market – Muskegon, MI
- Pybus Market - Wenatchee, WA
- Methow Valley Farmer's Market
- Downtown Story City, Iowa
- Washington Street Mall – Cape May, NJ
- Main Street Coon Rapids, Iowa
- **Main Street Market – Evansville, MN (580 population)**
 - Small town unattended grocery store
 - Offers paid memberships in exchange for 24/7 access (phone app unlocks store)
 - Scan items w/ phone or self serve kiosk
 - Limited staffed open hours w/o membership



Caileen and Alex Ostenson remodeled a main street storefront into a self-serve grocery store.

Dan Gunderson/MPR News

RESEARCH SUMMARY

- **Identify and build on existing assets.**

“Identify the assets that offer the best opportunities for growth and develop strategies to support them. Assets might include natural beauty and outdoor recreation, historic downtowns, or arts and cultural institutions.”

- **Engage all members of the community to plan for the future.**

“Engage residents, business owners, and other stakeholders to develop a vision for the community’s future. Stakeholder engagement helps ensure plans reflect the community’s desires, needs, and goals and generates public support that can maintain momentum for implementing changes through election cycles and city staff turnover.”

- **Take advantage of outside funding.**

“Even a small amount of outside funding applied strategically to support a community’s vision and plans can help increase local interest and commitment in the area and spur private investment.”

- **Create incentives for redevelopment and encourage investment in the community.**

“Make it easier for interested businesses and developers to invest in the community in ways that support the community’s long-term priorities.”

- **Encourage cooperation within the community and across the region.**

“Cooperation to achieve jointly established priorities helps leverage the assets that each party can bring to the table to make the most of the region’s resources.”

- **Support a clean and healthy environment.**

“Invest in natural assets by protecting natural resources and cleaning up and redeveloping polluted properties, which makes productive use of existing transportation, water, and utility infrastructure; increases the tax base and employment opportunities; removes environmental contamination; and helps spur investment in surrounding properties.”

- **Downtown Placemaking (4 Types)**

- Standard – improving public places through modifications to the physical environment that impact the perception of public space.
- Strategic – instrument for achievement of a specific goal, such as economic development, talent attraction, or cultural enhancement.
- Creative – uses the arts and cultural activities to rejuvenate public spaces.
- Tactical – temporary transformation of public space through experimentation to observe the benefits associated with modifications and to generate new ideas for improving public spaces.

- **Malls need an experience, not just shopping**

- Mix civic, cultural, entertainment, & housing

- **Resale brings in revenue**

- Secondhand apparel & other goods



• **Lee's Summit, Missouri – Downtown Market Plaza (Kansas City Suburb)**

- Permanent 3-Season Farmer's Market Pavilion
- Public Conservatory / meeting flex space / event Space
- Outdoor Performance Area & Movable Stage
- Infrastructure Improvements, art & water features, pedestrian areas
- Programming –
 - Concerts, painting classes, reading room w/ books & print media, & family / children's programs
- Private Development –
 - Multi-story apartment, mixed use building for restaurant / office uses, & boutique hotel
- Funded by voter approved bond, sale of surplus property, Downtown Community Improvement partnership, & potential private investment
- Groundbreaking was October 2023 (Bond passed April 2013 – Design 2020)

• **Downtown Market – Grand Rapids, Michigan (West Central Michigan)**

- Former 3.5-acre zone of vacant warehouses now a welcoming public space
- Indoor market w/ 21 vendors & outdoor farmer's market, restaurants, shared commercial kitchen, educational / event facilities, leaseholds for partnering organizations, rooftop greenhouse serves as a visual beacon, & streetscape improvements for walkability along with adjacent public transit
- Designed to benefit low-income residents nearby through food access, education, entrepreneurship, & job opportunities

• **Western Market – Muskegon, MI (37,700 Population) – *discussed in Pateros Roundtable #3***

- 90-150 square ft. retail rental chalets w/ \$1,125-\$1,875 seasonal rental cost
- The chalets are ideal for businesses selling homemade or custom items.
- The season runs from the beginning of May to the end of October w/ required open hours

• **Pybus Market – Wenatchee, WA (35,500 Population) – *discussed in Pateros Roundtable #3***

- Year-round interior market & event space w/ seasonal outdoor farmer's market
- Multiple restaurants & mix of vendors (weekend farmers, seasonal artisans, permanent businesses)
- "Historical destination where you can shop, dine, relax, bike on the river, meet friends, bring visitors, listen to music, and host your event or wedding — but most of all, it's a place to connect with passionate artisans, inventive food retailers and Wenatchee's creative community" – *Yakima Magazine*



*Downtown Market
Grand Rapids, Michigan*

- **Kings Park Downtown – Smithtown, NY (26,300 Population)**

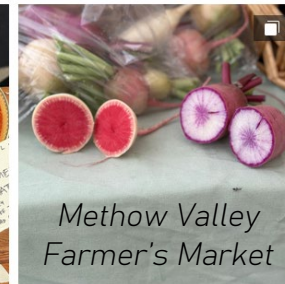
- “Experiencing substantial retail leakage; typically, an indicator that local residents’ demand for retail was not being met and they were traveling outside the district for their shopping needs”
- Wastewater improvement to attract restaurants, bars, medical offices, & residential
- Shared parking to increase capacity & improved pedestrian connections w/ wayfinding & “blade” signage
- Improve street crossings and sidewalk conditions w/ Farmer’s Market re-located adjacent to Main Street
 - Differential pavement & crossing flags, remove curb cuts / consolidate driveways
 - Goal to create wider, unimpeded sidewalks that can support pedestrian mobility, public street furniture, and outdoor seating for restaurants
- Storefront Improvement Program – plan to be run by Town or Chamber of Commerce
 - Small matching grants, as well as design services, to business owners making improvements to business signage and storefronts



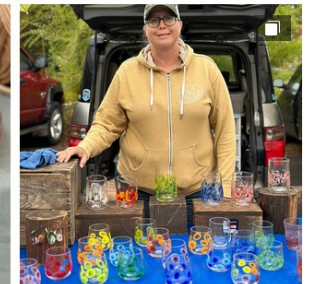
Park Bake Shop in Kings Park (Photo: The Long Island Times)

- **Methow Valley Farmer’s Market (CCD Approx. 6,000 Population)**

- Saturday Farmer's and Crafter's Market w/ grab & go food (early April – end of October), live music, & dogs welcome
- “You won't want to miss the heartbeat of the Methow community every Saturday in Twisp at the Methow Valley Community Center 9am-12pm Rain, Smoke, or Shine!” – www.methowvalleyfarmersmarket.com



Methow Valley Farmer's Market



- **Downtown Story City, Iowa (3,500 Population)**

- Extended Hours – Shop Story City Campaign
 - Increase business visibility (rotating business extended hours trial)
 - Signage Improvement (look open & vibrant for consumers)
 - Special events (theme nights, activities, extended hours to see if downtown business increases)
 - Get support for extended hours (shop local marketing – do businesses appreciate or feel supported)



- **Washington Street Mall – Cape May, NJ (2,850 Population)**

- “Picturesque town square lined with unique shopping, dining, and more. We are the heart of America’s Original Seaside Resort!”
- Street turned into a pedestrian-only, three-block outdoor mall that is ½ mile from the beach
- Open all year but some stores close or reduce hours in winter
- Victorian storefronts, whimsical fountains and benches throughout
- Metered parking within walking distance
- “Personalize A Mall Brick”
- Website provides mall experience - www.washingtonstreetmall.com (Plan Your Visit!)



- **Main Street Coon Rapids, Iowa (1,300 Population)**

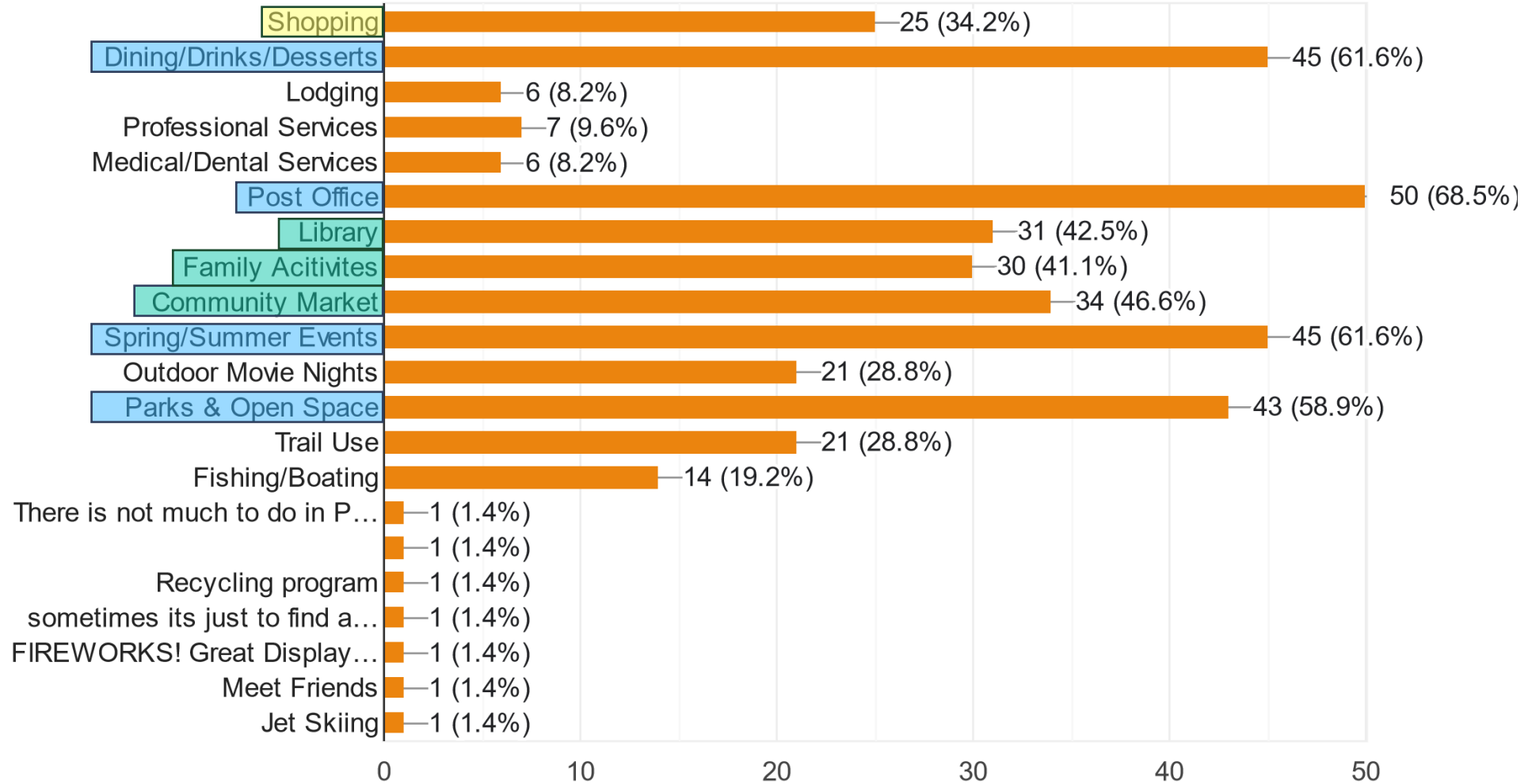
- 3 Transformation Strategies
 - Improve the Housing Options in Coon Rapids
 - Create a Healthy Business Climate
 - Improve the Physical Appearance & Infrastructure Downtown



SURVEY RESULTS SUMMARY

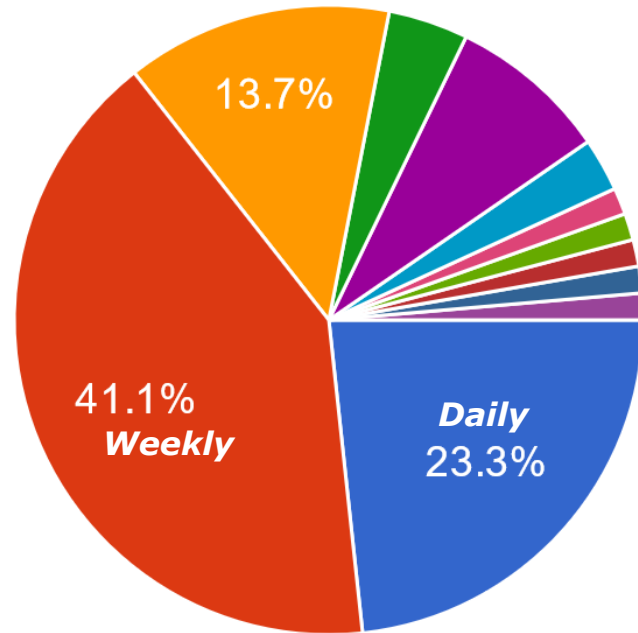
1. What brings you to downtown Pateros and the Pateros Mall? Check all that apply, please describe "other".

73 responses



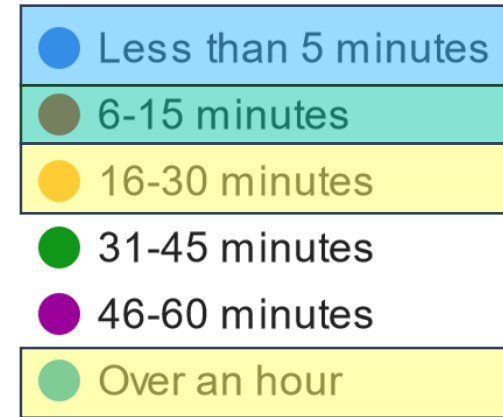
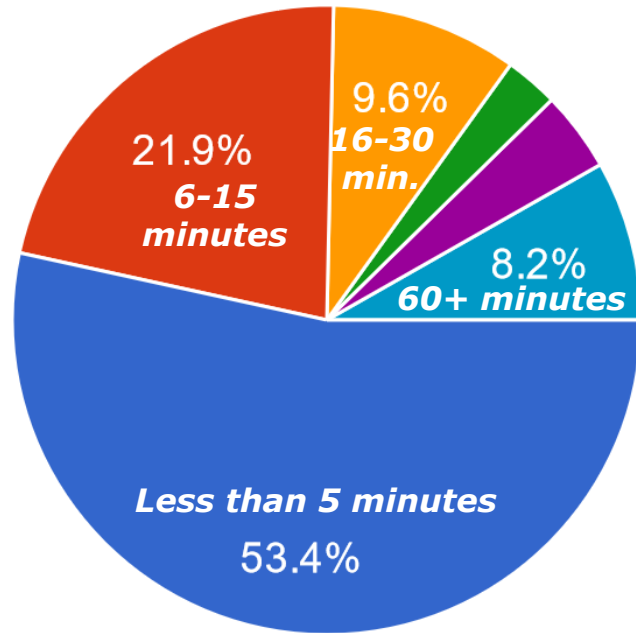
2. How often do you visit downtown Pateros and the Pateros Mall?

73 responses

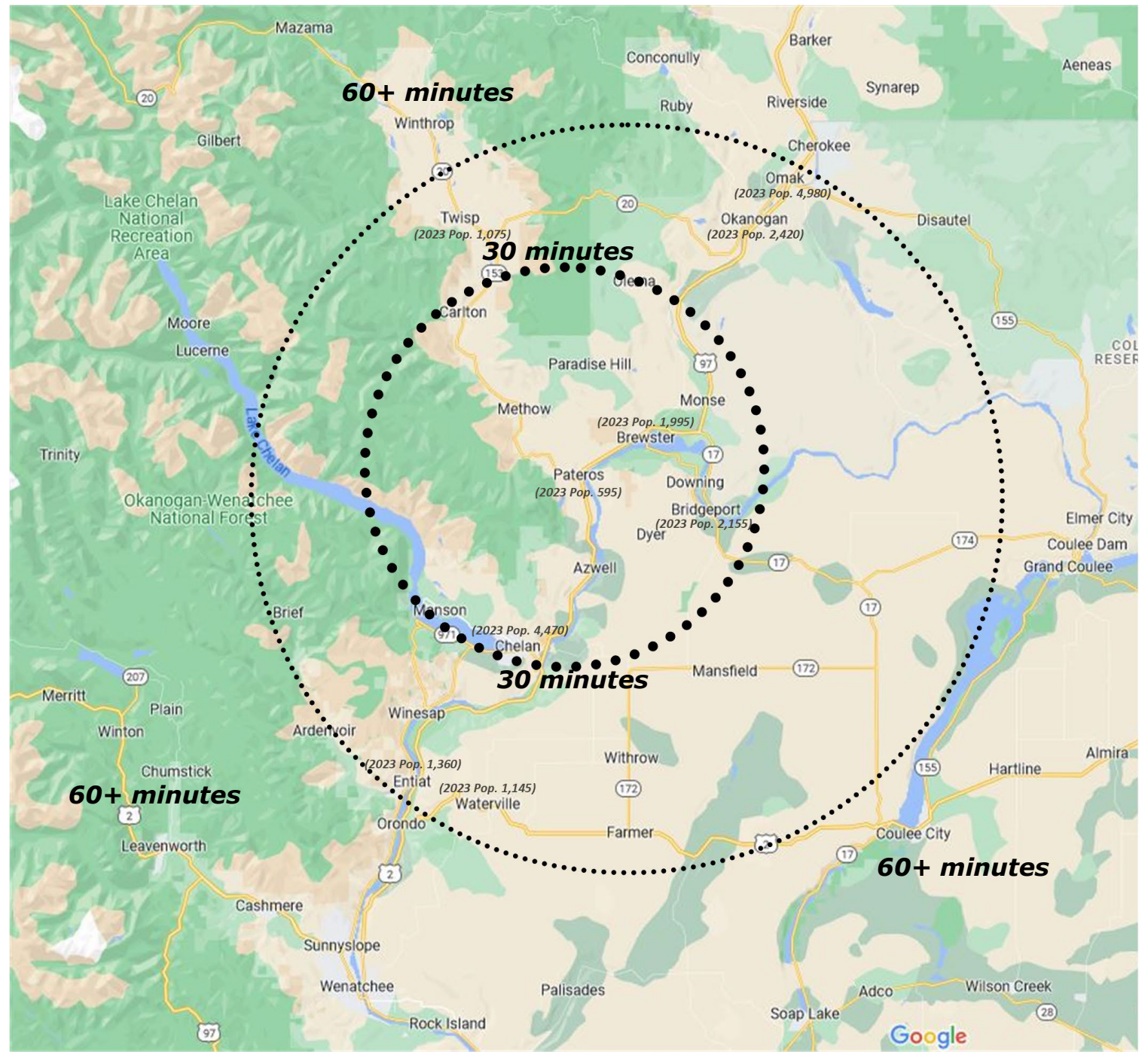


3. How far do you travel to downtown Pateros?

73 responses

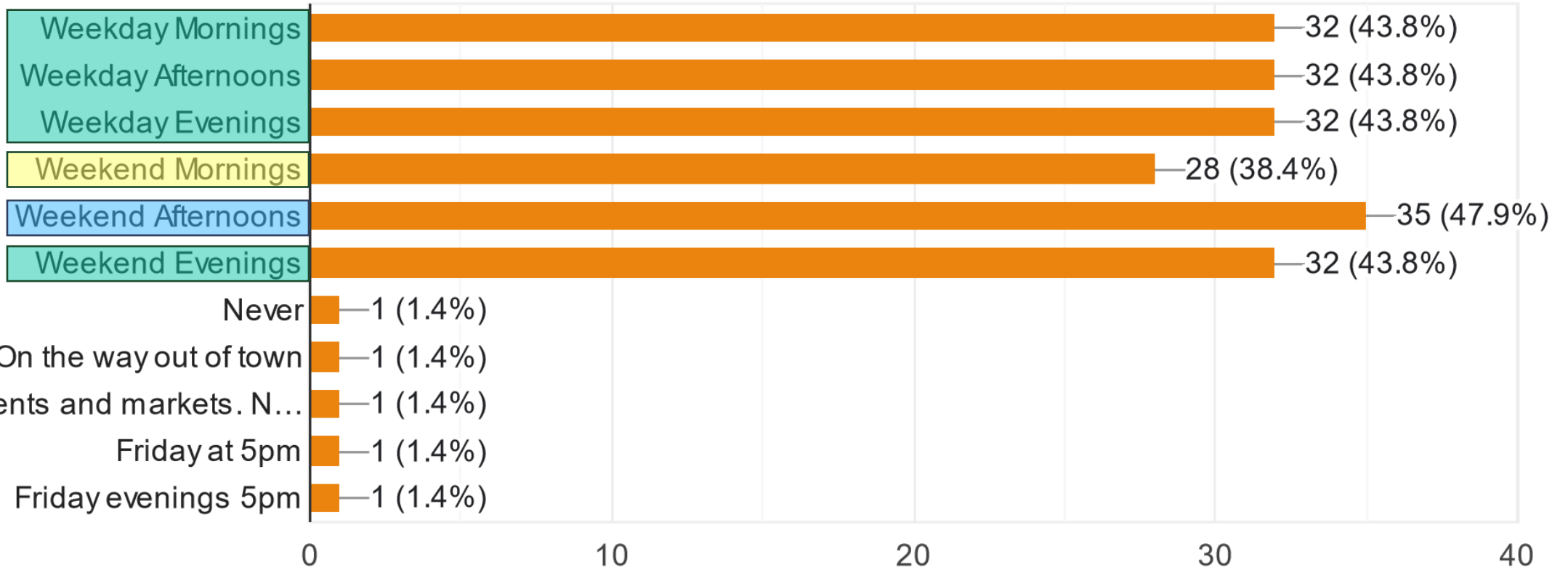


**30 - 45
MINUTE DRIVE
TO DOWNTOWN
PATEROS**



4. When do you typically visit downtown Pateros and the Pateros Mall? Check all that apply, please describe "other".

73 responses



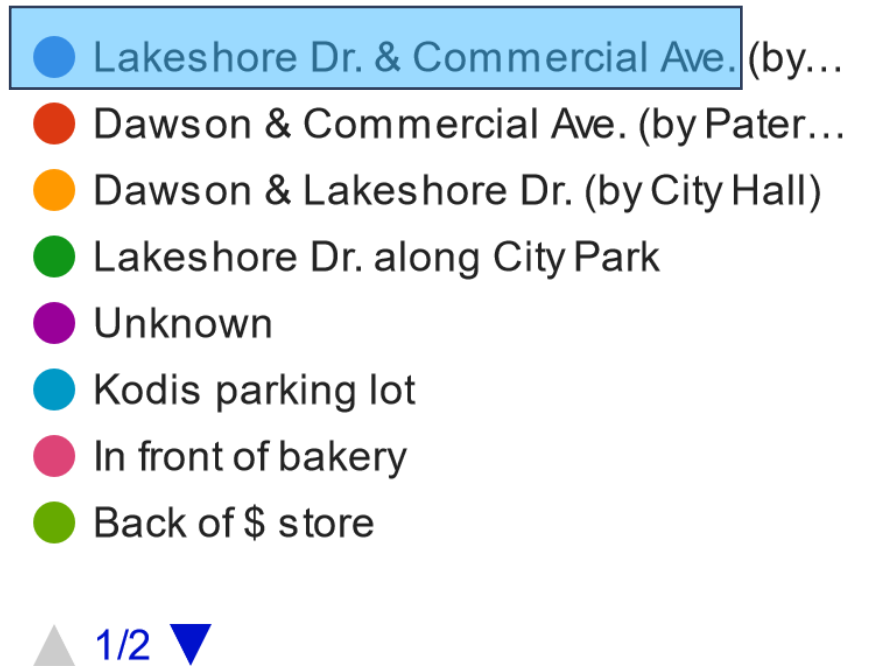
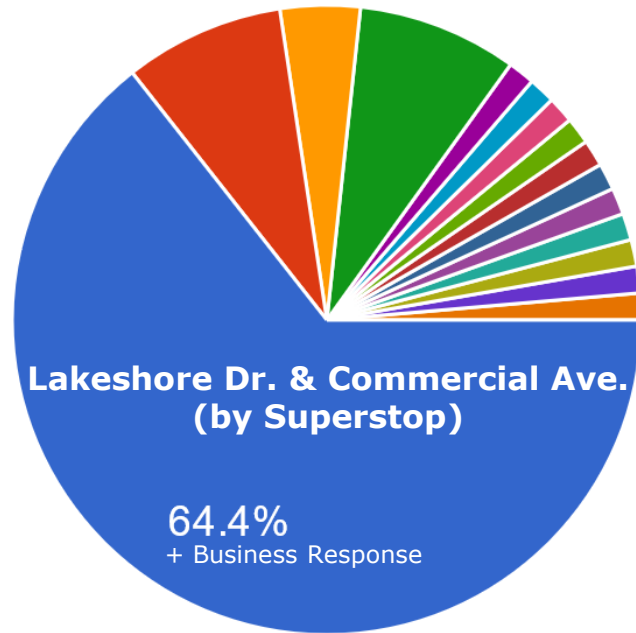
Are there additional times you would visit downtown Pateros and the Pateros Mall if there were activities or amenities available?

- Morning, Afternoons, Evening - Weekdays & Weekends (*all days, all hours*)
- During More Community & Family Events
- I would visit if I could catch a train to Wenatchee (*only Apple Line Bus at Chevron available*)



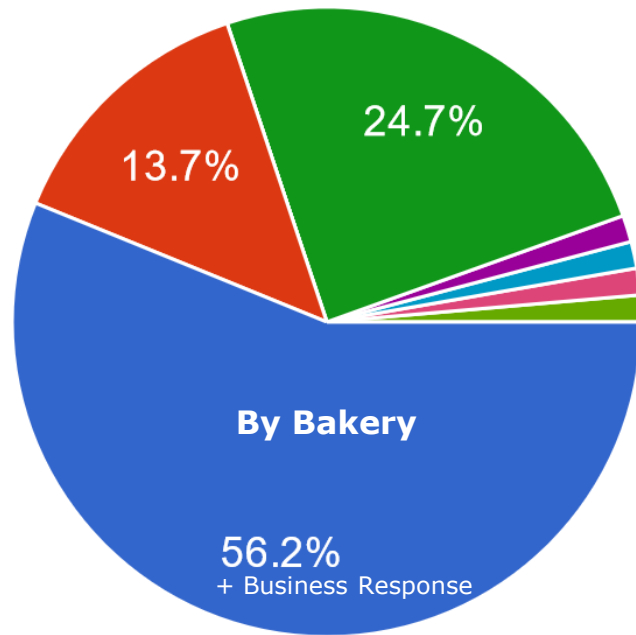
9. What/where do you consider to be the Pateros Mall entrance for vehicles?

73 responses



10. What/where do you consider to be the Pateros Mall entrance for pedestrians?

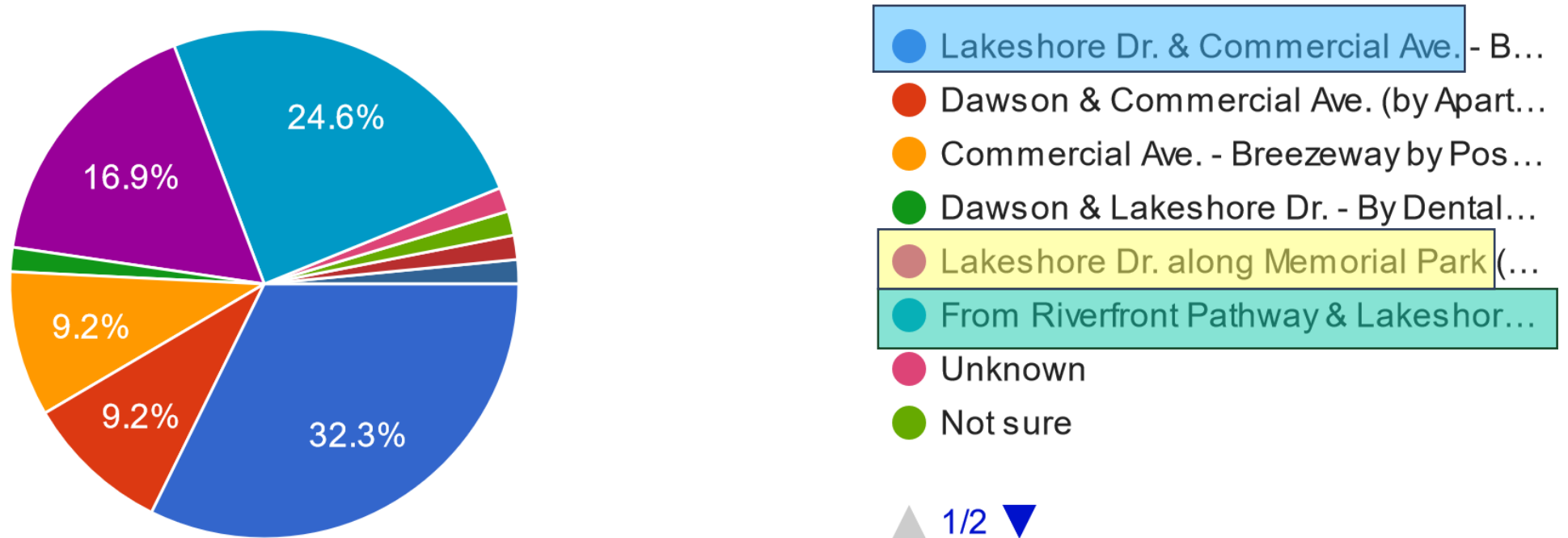
73 responses



- By Bakery
- Breezeway by Post Office
- By Dental Office & Law Office (by Memorial Park Restrooms)
- From Riverfront Pathway & Lakeshore Dr. (new Pavillion)
- Unknown
- All of the above
- By bakery or from parking lot at pump...
- Is there one?

11. What/where do you consider to be the Pateros Mall entrance for bicycles?

65 responses



Business Response - It depends. Local bicyclists by the Monument to the Methow, bicyclist passing through by the Bakery.

Would you like to see additional events, trade shows, larger or longer community market, nearly year-round activities, etc.)? If yes, please describe.

90% of respondents said yes!

- Vintage market / antique market once a year
- Larger market / two day market / year-round market / indoor market – more food /produce
- Swap meet / craft bazaar
- Flower shows, art shows, boat show, car shows, etc.
- More activities / community events, street dances, food truck events, events that use waterfront
- Art in the park event, music event
- Anything family oriented, DIY themed events, more weekend family events
- Winter event / festival
- New rink/school field would be an awesome addition to our community bringing in more tourism
- Anything to bring tourism / draw people off the highway
- “love the kids events and outdoor movie. Would be fun to see more organized kids activities such as pick-up soccer games or play groups.”
- Community spirit

Are there any additions or improvements you would like to see for the Pateros Mall area?

Infrastructure / Amenity / Design Highlights:

- Shade & more seating (covered areas)
 - Awnings on sides of buildings for vendor set up and shade (issue w/ vendor tents – wind)
 - Trees, landscaping, more decorative lights (string lights), shaded splash pad, breezeways
- Drinking fountain, garbage receptacles, restroom, bicycle tire pump
- Outlets for market vendors to charge phone / accept payments
- Parking - RV parking / larger parking spots w/ maneuverability, parking for events, EV charging
- Better highway crossing for pedestrians, pedestrian connectivity
- Better placement and visibility of town signage for traffic passing by on Hwy
- Winter sledding area, more kids activities (painted games), pickle ball courts, beach volleyball
- Public art / local art – history, scenic / interactive art
- Waterfront beach / beach area for swimming on Columbia, river walking path add. extension
- Speakers for music during events
- Continued rock/timber theme – business theme

Are there any additions or improvements you would like to see for the Pateros Mall area?

Business Highlights:

- Rentals for water activities
- More restaurants w/ indoor seating, cafes
- Grocery store, hardware store, gift shop, clothing store, hair and nail salon
- Kid friendly (ice cream, sno cones, Italian sodas), kid & teen activities (rollerskating)
- A “makers” market / more small business space
- Inside market (year round)
- Dancing, outdoor cultural events and music venues
- A large nice mall area would be a good start to draw festivals, car shows etc. to Pateros
 - More attractive hwy side for business
 - Building improvements – paint, modernization, look inviting
 - Reasons to stay longer like couple blocks in Twisp
 - Pressure wash the outside of the Post Office and Resource Center (cobwebs)
- More housing / affordable housing / workforce housing

Are there any additions or improvements you would like to see for the Pateros Mall area?

Idea Highlights for Old Grocery Store:

- Repurpose unused building / more commercial opportunities
 - Old grocery store developed into wedding/reception/meeting/rental space (add windows to the river facing wall) / indoor center
 - The rest of the building could be for a spa, massage studio, dance studio, hair styling, nails, specialty shops, etc. that would attract locals and tourists to travel to the area to spend time.
- The event center (bldg next to the bakery) would make a wonderful Senior Ctr./community center if the town was to purchase it.
 - A place for seniors to coffee and chat, it's a newer bldg with kitchen/cooking already in place, could serve a couple daily soups, sandwiches, salads and breads, etc. and its large enough to hold meetings, gatherings, classes , etc. At Christmas it could be a place to display decorated trees, in spring and summer there could be a cart selling some fresh fruit and I'd love to sell fresh cut flowers in a stand as well.

Are there any additions or improvements you would like to see for the Pateros Mall area?

Idea Highlights for Infrastructure:

- Possibly use area by RR tracks to make pull thru RV spaces w/ some grass, electrical hookups, and a picnic table in grass = half moon. This could generate income for town. Drive thru RV spaces would be great for the large units arriving for races, etc. If this can't be done next to RR tracks, maybe develop on inside of street.
- Covered area along mall with solar panels to provide electric for charging & market vendors.
- The road along the mall area and park should be one-way to help ease congestion and improve safety.



Are there any challenges or issues we should be aware of for this project?

- Rent empty buildings
- Not enough people / participation and customers / waning year-round population
- Easier to open and sustain a business in Pateros in the winter months, restaurant survival
- Promotion of event / someone to run the vendors, consistency and city support
- Things need to be more modern, Wi-Fi
- Funds / money / getting community involved and financially supporting it by participating
- People don't want change in Pateros / some will object to change, consider the opinions, then please go ahead. Staying the same is a sign of a dying town.
- Access to bathrooms
- During events they could use more than 1 shower (bathroom in park only has one).
- Event parking on other side of highway w/ ADA accessible walk bridge
 - If there was a walk bridge - locals could easily access & use park w/o crossing traffic
- Accessibility and public awareness
- Yes, need driveway markets in winter near back of PO
- Increased stress on infrastructure

Are there any challenges or issues we should be aware of for this project?

- We want businesses and tourists on the River side of the highway, not on the town side of the highway
- We need housing, not vacation rentals
- Much more media awareness...social media notifications regularly, frequently and widely. Maybe one person could take on this responsibility and be compensated \$100/month to keep it current and continuous
- Paying attention to landscaping on either side of highway is important as that is the first thing visitors will see when driving through pateros. If the plants and weeds are offputting from the beginning it is hard to get people to stop.
- Not blocking access & view from highway to current businesses
- Parking spaces are close together, congested ped./vehicle area, not enough space to maneuver.
- Is there a safe swim area in park? Is it possible?
- Please do not close our library!
- Minimizing any damage to existing ecosystem
- Water level changes on the river, rock riprap on the shoreline

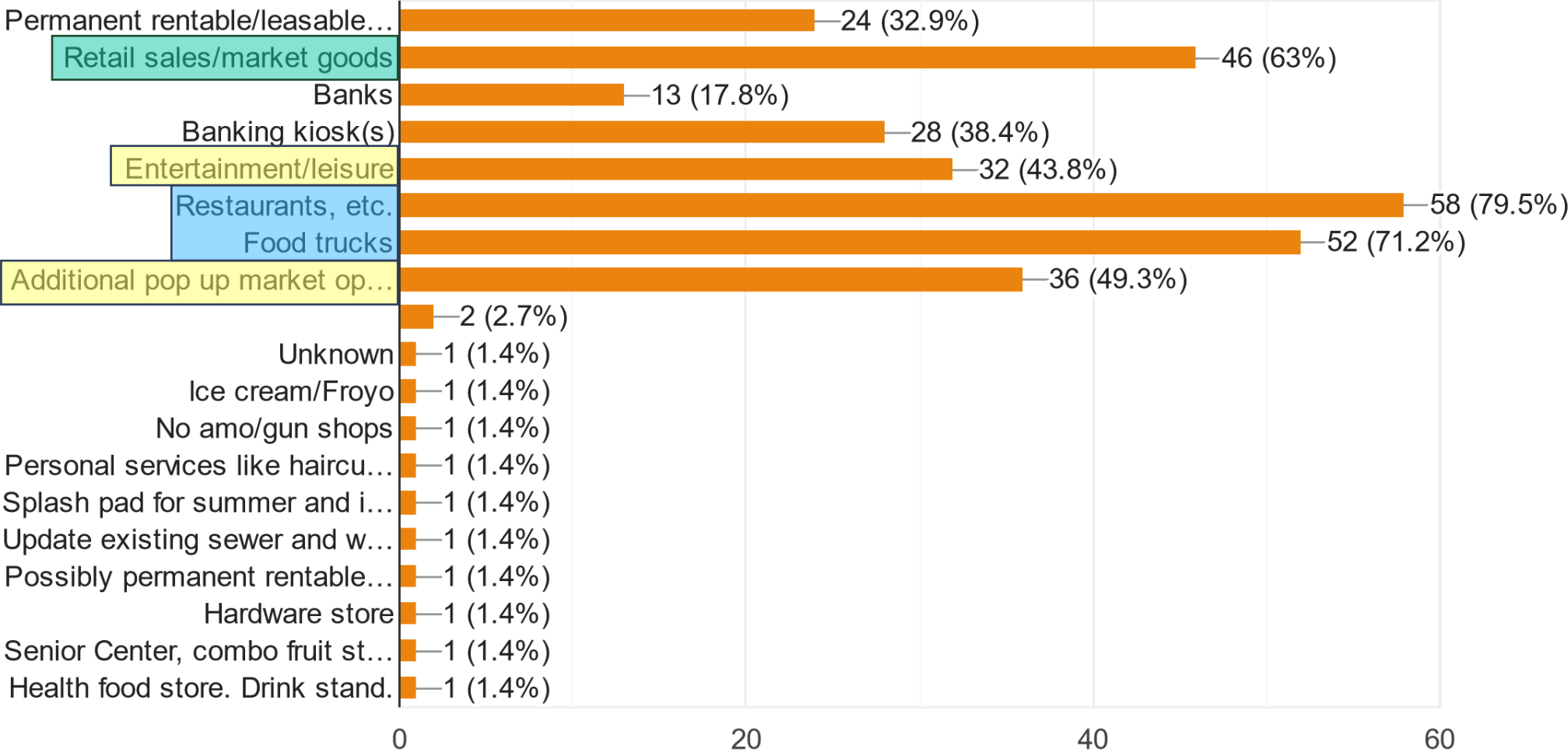
Are there any challenges or issues we should be aware of for this project?

- Expiring opportunity zone investment. Several properties own by single entity need to be more included as part of our community perhaps.
- Service infrastructure, public bathrooms, parking, services and accommodations
- “Just keep in mind if you want more patrons in your town, the staples are going to be food, toilets, and entertainment. If you are short on any of those three items, people will not stay. People will find alternative places to spend their money.”
- Make it less expensive for businesses to be on the mall, than off the mall



12. What other businesses would you like to see at the Pateros Mall? Check all that apply, please describe "other".

73 responses





Prior to 2014 Pateros fire, businesses offered watercraft rentals in the summer.

Both hotels have the same owner and only Lakeshore Inn is open year-round with winter occupancy typically workers and family visiting residents.

Downtown Pateros
↑
North

Is there anything else that we should be considering about downtown Pateros and/or the Pateros Mall that hasn't been asked?

- Snow removal, vagrants, the very old sewer line, what/who will be on readerboard
- I know it would be tricky but a Beach volleyball court would be amazing!! Basketball court
- A longer walking trail or track field
- The river and park are our biggest assets and should be the showcase
- Hills in front of stage thing make it hard to use that area during events since you can't set up well
- At least an ATM/Kiosk by park, instead of going to Quickie Mart during events & functions
- Handicap accessible & elderly friendly. Some people have difficulty lifting their feet over curbs, uneven surfaces
- Our downtown connects businesses, locals and nonprofits and is set up in a unique walkway that encourages that connection
- Making Industrial Way more visually appealing
- Highlight the waterfront space as community center / waterfront activity access
- I'm pleased and impressed with what has happened so far with our mall

Do you have any additional comments you would like to share?

- I love the addition of the path in front of the motel to the boat launch. It would also be nice to connect that path from the other boat launch to Peninsula Park. One way to do that would be go along the shore then make a floating dock/bridge to the end of Peninsula Park. This would allow for the whole estuary to be a swimming hole and you could provide docking on the outside of the bridge for residence who have docks then they wouldn't have to worry about their boats being beached when the water goes down. *(could have access/ownership issues)*
- The Pateros city overall needs better lighting in the neighborhood and sidewalks for walking in the evening or early morning hours
- The community needs to be more open minded
- We could really use a rentable indoor space, jungle gym, open gym, etc for during the winter
- Before trying to encourage tourism, it is necessary to have sturdy bathrooms and infrastructure - water, sewer, garbage infrastructure and staff
- Bigger, better signage on Highway & both entrances into town for markets & events!
- Make use of advertising - maybe call ins to KOZI Radio "2nd cup of coffee" and/or "party line" in Omak Radio. Facebook pop up page on Pateros Events Page?
- There's a lot of traffic into and going past Pateros. NEED something to draw those people in.
- Pateros has so much potential for the downtown area that isn't tapped yet
- Keep up the positive efforts. Improvements of recent years are working

WHAT DOES THE PATEROS MALL NEED

ACCORDING TO SURVEYS & INTERVIEWS?

- **More Food -**
 - Grocery store, more restaurants, ice cream, froyo, food trucks
 - Indoor coffee shop or wine bar to sit and visit
 - More places to sit inside and look out onto the park and river
- **More Shopping -**
 - Sporting goods, hardware, clothing, general store
 - Gas access for boats from the river
- **Personal Care –** Massage, hair, nail salon
- **More Entertainment -**
 - Theater/movies & live music – with concessions
 - Water equipment rental
 - Place for kids to play & teens to hang out
 - Additional family events / activities
 - Collaborate w/ school to avoid scheduling conflicts
 - More intergenerational opportunities / classes / lessons
- **Expand Community Market**
 - Size & duration
 - Can remain volunteer run w/ additional assistance
 - City involvement w/ refuse control and advertising/promoting
- **Theme Ideas –**
 - Rock/timber, family, & paddle wheel boat (Ives Landing)
- **People, some life, anything that draws in families**
 - Increased gathering businesses/spaces vs. transactional
- **More open businesses & more housing**

- **Infrastructure / Amenities –**
 - Shade, shelter from sun & rain/snow
 - Ash trees can be removed, as needed & replaced w/ additional shade
 - ADA accessible bathroom in middle of mall (easy to find)
 - More picnic tables / picnic areas /permanent benches (shaded)
 - Drinking water / refill water bottles
 - Electrical outlets along mall
 - Additional lighting
 - Decorative “twinkle” lighting / tree lighting
 - Layout community market booths along mall w/o blocking businesses
 - Lockable overnight vendor storage would assist with expanding market
 - Larger area to attract festivals and tourism, community spaces
 - Pedestrian connectivity from parking to mall
 - Wi-Fi / Broadband
 - Splash pad (need draw to existing – maybe painted games or interactive art, improved surface or utilize interactive water feature)
 - More green spaces (too much concrete)
 - More visibility & signage from Hwy 97 / improved wayfinding
 - Easier vehicle accessibility
 - Expand library to include private work/meeting rooms and a larger play/programming area to encourage increased length of stay
- **Updated signs for businesses / updated look**
 - Increased visual appeal / more inviting / draw from Hwy 97
- **A reason to visit year-round**
 - What draws Pateros residents to visit other places?

ECONOMIC ALLIANCE

- **What could the City of Pateros do to help bring business activity to the Pateros Mall?**
What infrastructure is lacking?
 - Pateros has done a lot to bring infrastructure into their downtown to ensure that if businesses located or built buildings there that they would be successful.
 - They are in the process of updating some of the facilities in the mall area that I think will bring up the aesthetics of the mall.
 - The City could identify a few businesses/franchises that they would like to bring to the area and utilize the materials from the Downtown/Retail strategies report to recruit them.
 - They could also use the information that was provided through that study to understand where leakage is happening and target those industries to come to the table.
- **What is needed to help businesses thrive over winter?**
 - The local customers need to shop local.
 - Do promotions, advertisements, and activities that could help bring tourists to the area winter.
 - Maybe some stay and play packages with the ski areas both down hill and cross country.
 - It is affordable to stay in Pateros and going up to the Methow is rather expensive.
 - They also need to have stores that are open. Many times, stores close early or shut down during the winter.

EA - ABANDONED BUILDING / VACANT LOT

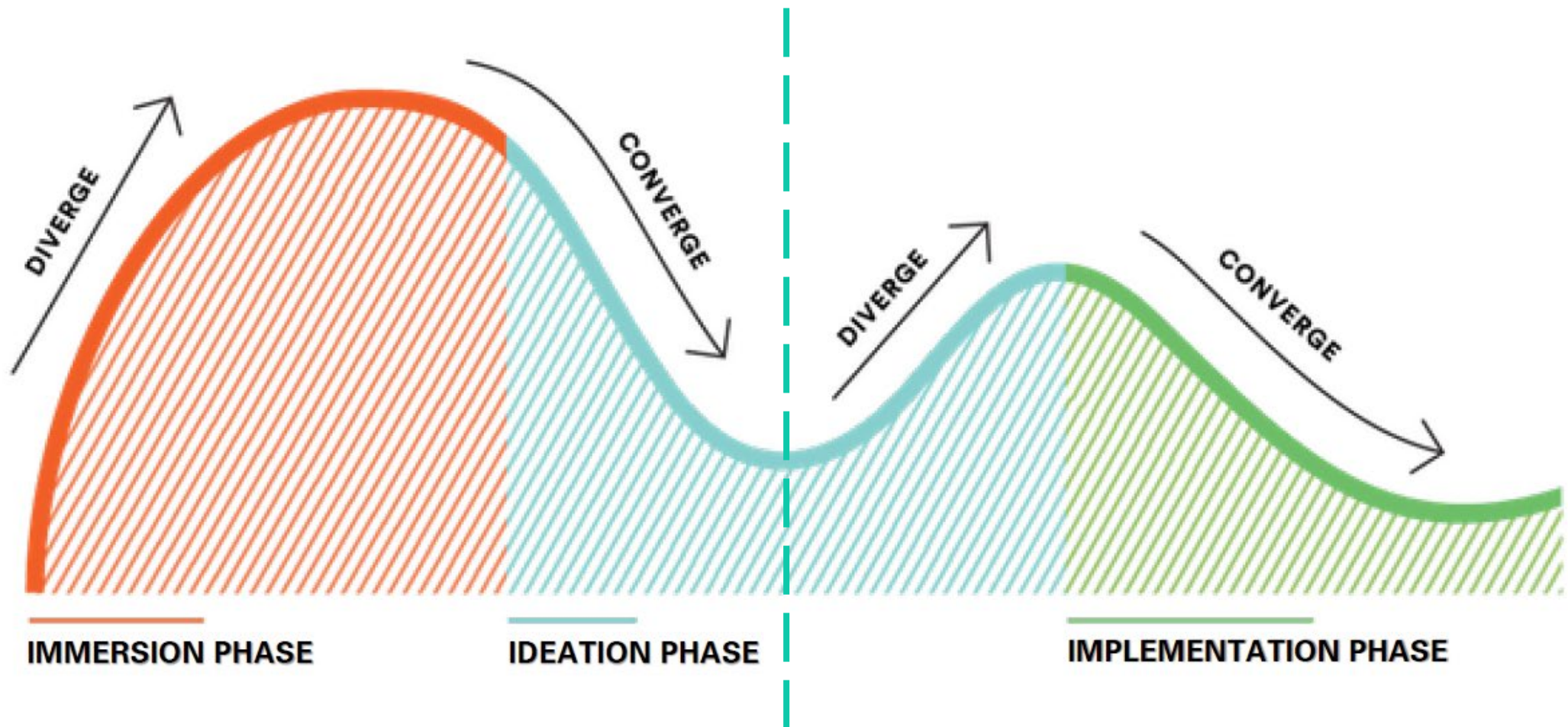
SUBCOMMITTEE RECOMMENDATIONS

- **Business/Landlord License Requirement – WA State DOR website**
 - Revenues could then be used to create an incentive program for a Façade Improvement grant program, downtown beautification, signage for the downtown area, etc.
- **Vacant Building Registration**
 - Revenues could be used to create an incentive program for a Façade Improvement grant program, downtown beautification, signage for the downtown area, and or pay for administration of the program.
 - Fees could be waived for certain building improvements.
- **Utility Fees**
 - Building Owner continue to pay utility fees even if the building is vacant.
 - Fees will assist the community in the maintenance of their current infrastructure and help offset fees for building inspector/code enforcer.
- **Create an Ordinance on Unfit Dwellings, Buildings and Structures**
 - “A property that is merely unkempt may reduce the value of adjoining property and if there are sufficient properties that are unkempt, unsightly and dangerous, that the habitability and economic well-being of the city are materially and adversely affected.”
- **Create an Empty Building Toolkit**
 - Resources for building owners to market their building
 - Access small business resources who have access to potential tenants
- **Update City Code to require building owners to cover vacant building windows/doors in aesthetically pleasing signage and art.**

FRAMING THE PROBLEM INTO OPPORTUNITY

Problem Statement

Pateros needs ways to setup the mall for economic opportunity because operating successful year-round businesses is a challenge.



PATEROS DOWNTOWN MARKET STUDY – NEXT STEPS

STAGES/PHASES OF DESIGN THINKING

1. **Empathize** – public participation (surveys, interviews), background, & research
2. **Define** – summarize feedback & prepare problem/opportunity statement(s)
3. **Ideate** – present summary & statement(s) to focus group for feedback
4. **Prototype** – w/ SPVV concepts (Winter 2024)
 - Design charrette w/ project team
5. **Test** – Feedback on SPVV concepts & draft downtown market study (Spring 2024)
 - Present to focus group
 - Public meeting presentation (*focus group attendance encouraged*)
6. **Implement** – Finalize Downtown Market Study (by May 2024)
 - Present to City Council (*focus group attendance encouraged*)

No community has ever accomplished tasks that its people consider impossible. By the same token, a town can do and can become whatever its people desires if they set their minds to accomplish the task. It will take the combined efforts, enthusiasm and faith, and it may take more time than most of us would like, but Pateros can be the kind of town we all want. We want a beautiful community. We will have it. Pateros is going places.

*Mayor Francis O. Adams
March, 1964*



QUESTIONS?

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Abandoned Building/Vacant Lot Subcommittee

Recommendations to
Okanogan County Municipalities

MEET OUR COMMITTEE

George Brady, Pateros City Council

Chris Branch, BOCC

Anna Marie Dalby, Small Business Owner, Brewster

Todd McDaniel, City of Omak Administrator

Lael Duncan, Tonasket Community Member

Beth Stroshane, Small Business Owner, Omak

Maria Lassila, Small Business Owner, Omak

Kurt Danison, Planner, Omak, Tonasket, Pateros, Twisp, Brewster

Patrick Law, Twisp Works

Don Linnertz, Twisp Chamber/Twisp Works

Roni Holder-Diefenbach, Economic Alliance

This committee was created to provide examples, solutions and recommendations for communities to address the following:

Identified Concern: Cities are suffering with lack of revenue due to no businesses in the vacant buildings. Sales Tax, and Utility fees are necessary for cities to operate. Public Safety and Community Vitality are impacted by long term vacant buildings & lots.

Identified Opportunity: This has provided us with an opportunity by addressing this concern, to support small businesses and entrepreneurs by providing them with a place to conduct their business. Many of these vacant buildings are within the downtown core of communities where new businesses want to be. This will support the local economy and create jobs within the communities.

This can be accomplished by:

- Helping property owners solve vacant building problems. (real estate, repair, ideas to market their business)
- List the buildings that want to sell-Economic Alliance
- Adopt a Vacant Building Registration Program which includes Window dressing Requirements:
 - Allows community support to know a building is vacant so support can happen quickly.
 - Community support can be printed security window film that protects the glass from vandalism, can have student or other art on it, and is cheaper and looks better than OSB.
 - Funding collected could be used for Facade improvement grants and or pay for City Building Inspector/Code Enforcer.
- If owner WANTS it to stay vacant provide minimum maintenance standards after registration.
- Waive fee for certain building improvements (Vacant Building Registration Fee)
- Create a Facade Improvement Program that addresses:
 - Paint, Flashing, Outside Esthetics
 - Referrals to local small business roster for registered contractors to do the work



Recommendation



Business/Landlord License Requirement

Many Cities in Okanogan County do not require a business to obtain a business license to operate within the city limits.

We recommend that all cities utilize the Department of Revenue to incorporate a annual Business License requirement in order to do business within their community including property owners who plan on leasing their property.

This is at no cost to the city and a business can do this when they renew their business at the SOS website annually.

Revenues could then be used to create a incentive program for a Façade Improvement grant program, downtown beautification, signage for the downtown area, etc.

[Example 1](#)

[Example 2](#)

[Example 3](#)

Recommendation #2

Vacant Building Registration

Throughout Okanogan County we have many vacant buildings and lots that continue to sit unoccupied, in many instances for years. We recommend that Cities implement a Vacant Building & Lot registration that would be completed as soon as building/lot is vacated. This registration would also come with fees. If a owner has numerous properties, each building/lot would be registered separately.

Example:

- Initial Registration Fee-\$250.00
- 6 Months Vacancy Fee-\$250.00
- 1 Year Vacancy Fee-\$500.00
- 1.5 Year Vacancy Fee-\$750.00
- 2 Year Vacancy Fee-\$1000.00+

Revenues could then be used to create a incentive program for a Façade Improvement grant program, downtown beautification, signage for the downtown area, and or pay for administration of the program. Fees could be waived for certain building improvements.

[Example 1](#)

[Vacancy Tax Example](#)



Recommendation # 3

Utility Fees

We recommend the Building Owner continue to pay utility fees even if the building is vacant. These fees will assist the community in the maintenance of their current infrastructure and help offset fees for building inspector/code enforcer.



Recommendation # 4

Create a Ordinance on Unfit Dwellings, Buildings and Structures

Communities find that unkempt, unsafe, unsanitary and otherwise improperly maintained premises and structures, sidewalks and easements within the city, in addition to the obvious hazards which these conditions pose to the public health, safety and welfare, adversely affect the value, utility and habitability of property within the city as a whole and specifically cause substantial damage to adjoining and nearby property. This includes storage in vacant buildings that are not zoned or classified for commercial and or personal storage use.

A property that is merely unkempt may reduce the value of adjoining property and if there are sufficient properties that are unkempt, unsightly and dangerous, that the habitability and economic well-being of the city are materially and adversely affected.

[Example 1](#)

[Example 2](#)



VACANT

Recommendation #5

Create a Empty Building Toolkit

Create a toolkit with resources for building owners to market their building

And to access small business resources who have access to potential tenants

Empty Building Toolkit!
Do you have empty buildings in your downtown that need to be filled? Follow this brochure or go to [url link](#) for tips on downtown revitalization and filling empty commercial space in your town.

What's Missing in Your Downtown?
Go to [\(Downtown Strategic Plan\)](#) for information tailored for your town. Find out which businesses are needed in your town!

Current Vacancies in Your Town!
[Click here](#) to see the full list of empty buildings in your community.

Existing Resources
NCWEDD: Northcentral Washington Economic Development District provides regional development and economic support for Chelan, Douglas, Okanogan counties and the Colville Confederated Tribes.
TwispWorks: Committed to increasing the cultural and economic vitality of the Methow Valley, visit [twisp-works.org](#) for information on small business support in the Methow Valley.
Economic Alliance of Okanogan County: [economic-alliance.com](#). Support for small businesses of Okanogan County.
Washington SBDC: a network of over 30 expert business advisors to help Washington businesses grow through advising, education & research.

Small Business Resilience Grants!
Looking for a grant to help you renovate your business, improve fire resiliency or recover from Covid-19 losses? [Click here \(link\)](#) for details on the SBEG from TwispWorks!

Need financing for your business?
The Methow Investment Network is a place to pitch your business idea, gain mentors and valuable feedback, as well as capital for your business venture!

The problem with empty commercial buildings ...
I suspect you'll want to frame the problem this brochure helps solve on this panel?

Thinking about Reinvesting in your Community?
[Click here](#) for information on the 1031 Exchange policies.

Empty Building Toolkit

BUSINESS SUPPORT
TwispWorks.org

OPEN
Welcome

THE IRON HORSE

Recommendation #6

Update City Code to require building owners to cover vacant building windows/doors in aesthetically pleasing signage and art.

Examples of language to add to code is covered in previous slides. Example Graphics below or as part of Empty Building Toolkit on previous slide.



Resources

MRSC

Article: How Vacant Buildings Affect Communities



This Comprehensive Economic Development & Recovery Strategy (CEDRS) document has been prepared for the Okanogan County Economic Alliance with sponsorship funding support from the Washington State Department of Commerce.

For more information about the CEDRS process and this report, please contact:

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AT-A-GLANCE SUMMARY

This *Comprehensive Economic Development & Recovery Strategy* (CEDRS) has been prepared by the Okanogan County Economic Alliance (EA) with sponsorship funding support from the Washington State Department of Commerce. The Economic Alliance envisions the citizens and communities of Okanogan County working together to bring prosperity to all. What follows is a summary of major findings and recommendations of this CEDRS report.

Existing Conditions & Trends

As the geographically largest county in Washington state, Okanogan County's population is estimated at 43,130 with 18,025 jobs as of 2020. Historically and today, settlement patterns of the Okanogan have been driven by road accessibility – primarily the south-north corridor of US 97 and the seasonally open east-west route of the SR-20 North Cascades Highway. In addition, SR-155 connects Omak as the largest city via the Colville Reservation to Grand Coulee Dam.

Historically dependent on natural resource activities, the area in recent years has benefitted from Puget Sound tourism via SR-20 and Canadian visitors via US 97. Repeated wildfires in recent years have at least temporarily disrupted economic activity. Most recently, the COVID pandemic of 2020 has served to substantially affect travel and tourism activity, with economic impacts to retail, dining and lodging establishments as well as to other business sectors.

The county's population is more racially and ethnically diverse, older, growing more slowly, with lower household incomes and lower labor force participation than the rest of the state and the three-county North Central Washington (NCW) region. Government comprises the largest job sector, followed by natural resource activities including agriculture and forestry. County residents are more dependent on government transfer payments with a below average share of net earnings (including wages and salaries) than is the case for the rest of the state.

Unemployment has traditionally been above statewide averages, but despite a spring 2020 spike in pandemic-related joblessness, rates have since reduced following a pattern similar to the rest of the NCW region and state. However, from 2010 to 2019, county-wide labor force has dropped by 1,500, with further reductions experienced through the pandemic into 2021.

Due to the large geographic area and diversity of communities, five separate sub-county regions have been considered based on U.S. census county divisions. These are the:

- **Central Area** (13,800 residents) – with the two largest cities as a retail/service center
- **East-CCT Reservation** (6,000) – with predominant Native American population
- **Methow Valley** (6,400) – large geographically with visitor and entrepreneurial appeal
- **North County** (11,900) – showing population growth but underrepresented with jobs
- **South County** (5,000) – predominantly Latino, work-oriented and agriculturally based

SWOT Analysis

Strengths, weaknesses, opportunities and threats (SWOT) affecting economic development potential have been considered across seven topics:

- **Geography** – offering diversity of natural setting offset by inconvenient access to major metropolitan centers but with the prospect of growing attraction for non-urban living
- **Demography** – with challenges of older populations and below-average incomes, counterbalanced by new households with higher incomes and entrepreneurial bent
- **Economy** – a strong natural resource based and entrepreneurial ethic but with eroding labor force and weak critical mass including challenges of retail/tourism consolidation
- **Infrastructure** – with base capacity represented by 13 incorporated communities offset by inadequate broadband, stretched emergency access, and limited healthcare options
- **Housing** – offering a wide range of residential options and pricing but with challenges of an increasingly limited supply of low-mid range affordable housing
- **Education** – yielding a workforce with high school and some college experience but with long-term risk of displacement of lower skill workforce in favor of tech-readiness
- **Partnership Resources** – with the greater NCW region, Canadian partners, and potential Opportunity Zones but with increasing funding needs amid strained resources

Also reviewed by this report are SWOT features distinct to each of the five sub-county regions.

Recovery, Resilience & Diversity

Key take-aways from the data and SWOT analysis can be informed from the perspectives of:

- **Economic recovery** – as illustrated by wildfire events, the decline of natural resource-based industries and the most recent COVID-19 pandemic and economic downturn. While different events have followed varied trajectories, economic assistance is most needed and appropriate for those sectors of the economy and communities of Okanogan County where recovery is not readily forthcoming on its own.
- **Economic resilience** – addressing the question of what it takes to withstand or avoid an economic shock altogether. A key initiative supporting long-term resiliency across issues associated with wildfire, industry change, and public health is the need for improved internet and broadband service – reaching to cover as much of the county’s population as quickly as reasonably possible.
- **Diversity** – to better address the challenge of a remarkably diverse county but with five comparatively homogenous and geographically distanced sub-county regions. While these regions would benefit from greater diversity of population and employment, it is not expected that sub-county areas will change to fully match the overall diversity of the county. Rather, initiatives can encourage collaboration between adjoining sub-county areas as opportunities for expanded economic and community development.

Strategic Direction & Action Plan

The strategic direction taken by the Economic Alliance and participating governmental agencies and other organizations is intended to address the question of: *Where do we want to go?*

This role is consistent with the existing function of the EA Infrastructure Committee to annually recommend updated priority infrastructure applications and economic development project priorities for review and approval by resolution of the Okanogan County Board of Commissioners. Two other current EA priorities are to facilitate the Okanogan County and CCT Broadband Action Team – together with marketing of Okanogan County Opportunity Zones.

In addition to these already adopted project priorities, this CEDRS addresses short and longer-term economic development and recovery opportunities over the next 5-10 years. The strategic plan differentiates between:

- **Core Economic Development Priorities** – as the primary focus for the on-going work program of the Economic Alliance in cooperation with local governmental, non-profit and business partners. CEDRS priorities include:
 - ✓ *Business & industry development* – with small business as a primary focus
 - ✓ *Downtown & Main Street revitalization* – a priority across most Okanogan cities
 - ✓ *Tourism market recovery* – repositioning post-pandemic for added value capture
 - ✓ *Opportunity zone investment* – as incentives for private investment in three OZs
 - ✓ *External & internal marketing* – to tourism, housing, business & investor interests
- **Supporting Opportunities** – as additional priorities reinforcing economic development opportunity with the Economic Alliance playing a support role to initiatives typically led by other public, non-profit and business organizations serving Okanogan County, as for:
 - ✓ *Affordable housing* – a county-wide priority for diverse workforce & senior housing
 - ✓ *Broadband internet* – with a goal of full coverage (as close to 100% as possible)
 - ✓ *Wildfire risk management* – supporting efforts for consensus-based planning/action
 - ✓ *Health care stabilization* – with large employers boosting private insurance capacity
 - ✓ *Community infrastructure* – for full utilization of federal/state funding programs

Evaluation Framework

The evaluation portion of the CEDRS process is intended to cover two questions that will be addressed as implementation occurs, notably: *How are we doing?* and *What can we do better?* Planned in conjunction with this CEDRS process are three possible types of performance measures:

- Annual metrics for Okanogan County
- Periodically updated community or sub-county regional profiles
- Evaluation specific to the purposes of each individual CEDRS project implemented

ABOUT THIS CEDRS

This Comprehensive Economic Development & Recovery Strategy (CEDRS) has been prepared by the Okanogan County Economic Alliance, a 501 (c) 3 non-profit organization. The Economic Alliance works to create an effective partnership between private enterprise, county, tribal and local governments in Okanogan County – also as part of the 3-county North Central Washington Economic Development District (NCWEDD) encompassing Okanogan, Douglas and Chelan Counties.

This CEDRS has been prepared in support of the overall vision and mission of the Economic Alliance for economic development and prosperity in Okanogan County.

Vision

The Economic Alliance envisions the citizens and communities of Okanogan County working together to bring prosperity to all.

The Mission

Facilitate partnerships with private, government, and tribal entities that will create an environment to nurture, support and recruit businesses and industry in Okanogan County.

CEDRS Participants

The Economic Alliance (EA) is governed by a Board of Directors with representation from municipal and county governments, and the tribes – together with representation from the business community.¹ The EA Board has reviewed and approved this CEDRS document as a fresh look strategy for economic development in cooperation with Okanogan County Board of Commissioners and the regional NCWEDD organization.

| Executive Board | |
|--|--|
| Chris Branch, Chairman | Okanogan County Commissioner |
| Lael Duncan, 1 st Vice Chair | Okanogan Community Action Council |
| Kurt Danison, 2 nd Vice Chair | Highland Associates |
| Anna Marie Dalbey, Secretary | Coldwell Banker Real Estate, Brewster |
| Maria Lassila, Treasurer | Mirage & Omak Theaters |
| George Brady, Past Chair | Cascade Biological Supply, Pateros |
| Board Members | |
| Jonnie Crossland | Colville Tribal Casinos |
| Jon Culp | City of Okanogan Mayor |
| Alan Fisher | CEO, Mid-Valley Hospital |
| Rachelle Haven | Grand Coulee Dam Area Chamber |
| Amanda Jackson-Mott | Methow Arts Alliance |
| Lanie Johns | Okanogan County Commissioner, Clerk of the Board |
| Aaron Kester | Tonasket Natural Food Co-op |
| Don Linnertz | TwispWorks |
| Stacy Luckensmeyer | Wenatchee Valley College |
| Kristi O’Neill | Work Source, Career Connection Specialist |
| Mayra Pamatz | Umpqua Bank |
| Ted Piccolo | Image Communications & Consulting, Nespelem/Coulee Dam |
| Michael Porter | Omak School District |
| Sally Ranzau | Mayor of Winthrop |
| John St. Pierre | Colville Tribal Planning |
| Staff | |
| Roni Holder-Diefenbach | Executive Director |
| Carolyn Davis | Administrative Assistant |
| Lewis Blakeney | Certified Business Advisor |
| CEDRS Preparer | |
| Eric Hovee | E. D. Hovee & Company, LLC |

Table of Contents

| | |
|---|-----------|
| AT-A-GLANCE SUMMARY | i |
| ABOUT THIS CEDRS | iv |
| I. INTRODUCTION | 1 |
| Background | 1 |
| The Economic Alliance | 2 |
| Report Organization | 2 |
| II. EXISTING CONDITIONS & TRENDS | 3 |
| Okanogan County | 3 |
| Demographics | 4 |
| Economic Conditions | 7 |
| Sub-County Profiles | 15 |
| III. SWOT ANALYSIS | 26 |
| SWOT Process | 26 |
| SWOT Summarized | 26 |
| IV. RECOVERY, RESILIENCE & DIVERSITY | 29 |
| Economic Recovery | 29 |
| Resilience | 30 |
| Diversity | 31 |
| V. STRATEGIC DIRECTION/ACTION PLAN | 33 |
| Strategic Direction | 33 |
| Current Action Plan | 34 |
| 5-10 Year Strategic Plan | 35 |
| VI. EVALUATION FRAMEWORK | 43 |
| Performance Measures | 43 |
| CEDRS Review & Updating | 44 |
| APPENDIX. PRIORITY PROJECT LISTINGS | 45 |
| END NOTES | 49 |

I. INTRODUCTION

Balanced economic development has long been a priority for the residents, businesses and communities of Okanogan County. The most recent impetus for updated strategic analysis and planning has come as a result of the COVID-19 pandemic starting in the early months of 2020. Consequently, the Okanogan County Economic Alliance with sponsorship funding support from the Washington State Department of Commerce has prepared this 2021 Comprehensive Economic Development and Recovery Strategy (CEDRS) for Okanogan County.

BACKGROUND

In 1992, an Economic Diversification Strategy for Okanogan County was prepared for the then county-wide Okanogan County Council for Economic Development (OCCED). The diversification strategy was intended as a response to local and international changes in the supply of timber with environmental, technology and market conditions causing job loss for those employed in logging, mills and related supported industries.² Of particular concern at the time was that a shift from high paying employment to lower paying jobs and transfer payments had resulted in a decline in the county's overall standard of living.

Opportunities identified as available to the region were to maintain a viable but more diversified forest products industry, increase tourism-recreation attributes, encourage development of small business ventures, support development projects of the Colville Confederated Tribes, and attract retirees and vacation home development. These opportunities were offset – at least in part – by needs for community infrastructure investment, *ready-to-build* industrial sites, tourism marketing and workforce retraining.

Subsequently in 1994, Okanogan County was recognized as having “led the way in the Pacific Northwest on the creation of a process to identify and prioritize economic development projects in a county.”³ Nearly 30 years later since adoption of the economic diversification this strategy, Okanogan County has benefitted from growth of tourism, in-migration, tribal development and supporting community infrastructure.

As is the case with many other Pacific Northwest communities, the timber industry has faced on-going challenges with continued job loss. Closure of the county's two lumber mills and closure of the Kincross Gold Mine in the north county area had major adverse impacts to the county's economy and to the local communities where these employers were located.

The OCCED organization disbanded for a time. Subsequently these activities have been transferred with a reinvigorated approach now led by the Okanogan County Economic Alliance (dba Economic Alliance), incorporated as a non-profit with the vision of the “citizens and communities of Okanogan County working together to bring prosperity to all.”

In 2020, Okanogan County along with the rest of the nation and world experienced a new crisis in the form of the global COVID-19 pandemic. As with much of the rest of the Pacific Northwest

and nation, the economic effects proved to be sudden and severe – but followed within less than a year’s time by substantial economic recovery, initially occurring at a more rapid pace than with most economic downturns. However, the pandemic has also accelerated other changes already underway that can be expected to affect communities of the Okanogan region in the years ahead.

THE ECONOMIC ALLIANCE

This Okanogan County Economic Alliance promotes economic development through planning, research, small business advising and development. Programs and services to support local communities, businesses and other organizations in the Okanogan County Service area include roles as:

- **Associated Development Organization (ADO)** – as designated by Okanogan County and as recognized by the Washington Department of Commerce with responsibilities for business recruitment, expansion and retention, and assisting start-up businesses.
- **Small Business Development Center (SBDC)** – as a resource for expert advising, management training and market research in partnership with the U.S. Small Business Administration (SBA) and Washington State University (WSU).
- **Okanogan County Tourism Council (OCTC)** – with the Economic Alliance providing administrative support for OCTC including providing tourism information.

REPORT ORGANIZATION

The remainder of this CEDRS report is organized to cover the following topics:

- Review of **existing conditions and trends** that have shaped Okanogan County’s economic and community vitality in recent years.
- Analysis of **strengths, weaknesses, opportunities and threats (SWOT)** expected to drive and/or constrain county-wide economic prospects going forward.
- Special focus on federal, state and local objectives for **economic recovery, resilience and diversity**.
- **Strategic direction and action plan** including specific opportunities for economic development of significance to individual communities and the entire Okanogan County region.
- **Evaluation framework** as a means to prioritize pivotal projects and to monitor progress toward full economic recovery and improved resilience longer-term.

An **appendix** to this CEDRS report provides a summary of recent regional and county-wide priority project listings.

II. EXISTING CONDITIONS & TRENDS

This CEDRS report begins with a review of existing conditions and trends affecting Okanogan County. The analysis addresses the county’s position within the larger 3-county region of North Central Washington (NCW) and the state of Washington – as well as for the widely varied and distinctive sub-county geographies within Okanogan County.

OKANOGAN COUNTY

As the largest county geographically within Washington state, Okanogan County encompasses approximately 5,300 square miles. The county covers about the same land area as the state of Connecticut – or more than Delaware and Rhode Island combined.

Okanogan County is bounded on the west by the Cascade Mountains, on the north by the Canadian border, on the east by adjoining Ferry County and on the south by the Columbia River. While much of the county is mountainous, there are also deep river valleys – as with the Okanogan and Methow Rivers as tributaries to the Columbia – along which much of the region’s population and economic activity is situated.

Population

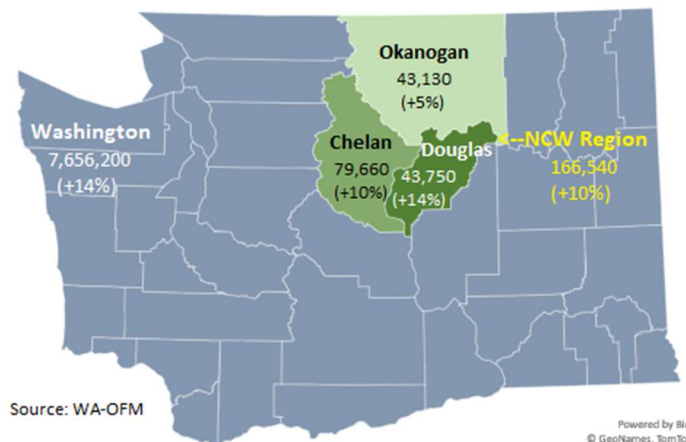
With a population estimated at 43,130 residents as of 2020, Okanogan County accounts for 26% of the 166,540 residents of the three-county North Central Washington (NCW) region – also including the adjoining counties of Chelan and Douglas.

Okanogan County accounts for just 0.6% of the nearly 7.7 million residents of Washington state – though representing 7.4% of the state’s land area.

County-wide population density averages 8.2 persons per square mile – just 1/13th the average of 107 persons per square mile across the entire state.

Historically and currently, settlement patterns of Okanogan County have been driven by road accessibility. The county is served by two major highways. US 97 runs south-north to the Canadian border, closed during the COVID-19 pandemic. The SR-20 North Cascades Highway runs east-west through the Cascades Mountains to the Puget Sound but is typically closed due to weather from about late November/mid-December through early May. In addition, SR-155 connects Omak via the Colville Reservation to Grand Coulee Dam on the Columbia River.

Okanogan, NCW & Washington State
Populations (with % Growth 2010-20)⁴



Economy

Long inhabited by indigenous native peoples, the Okanogan region was one of the last in Washington to be settled by Europeans – whether from Canada or from the U.S., initially by prospectors. In 1872, the Colville Reservation was established, with lands for multiple tribes set aside in southeast Okanogan County and extending into adjoining southern Ferry County.

Starting in the late 1800s, the area was slowly settled with industry related to agriculture, mining, forestry, and tourism. Grand Coulee Dam was completed in 1942 providing electricity and flood control for lands served by the Columbia River and its tributaries. Economic activity for the Colville Reservation has been largely the responsibility of the Colville Tribal Federal Corporation, with multiple enterprises and serving as a major sub-county regional employer.

In recent years, agricultural activity has been challenged, especially due to reduced orchard activity with more extreme weather conditions in the northern portion of the county – offset in part by boutique and organic farming as in the Methow Valley and continued strong agricultural activity in the South County area. Economic potentials have been adversely affected by repeated wildfires – most notably the Carlton Complex wildfire burning over 250,000 acres in 2014 – including homes destroyed in and around Pateros.

Most recently, the COVID pandemic of 2020 has served to at least temporarily and substantially affect travel and tourism activity, with resulting economic impacts to retail, dining and lodging establishments. While travel and in-migration from the Puget Sound has re-emerged, Canadian traffic to date has been eliminated due to closure of border crossings. It is against this backdrop that this CEDRS report now proceeds to consider the demographic and economic data that further detail conditions pre-pandemic and since.

DEMOGRAPHICS

Demographic indicators of significance for Okanogan County are summarized in comparison to the three county North Central Washington (NCW) area and the entire state. The data provided is derived primarily from three inter-related sources:

- The U.S. Census Bureau which conducts the decennial census and also annual surveys as provided by the American Community Survey (ACS) process.
- The Washington State Office of Financial Management (OFM) which provides state authorized estimates of population for state, county and local jurisdiction for years between the decennial nation-wide censuses.
- Private proprietary data of the nationally recognized Environics/Claritas demographic firms – drawing on Census and other resources to estimate current conditions for communities at varied levels of geographic specificity.

A review of key demographic indicators is provided by the graphs and accompanying narrative on the next page. For each graph, the blue bar shows conditions for Okanogan County, the dark green for North Central Washington (NCW), and the light green for the state of Washington.

As depicted by the first graph to the right, **population growth** for Okanogan County occurred at a pace half that of the larger NCW region over the last decade – both well below a 14% population increase experienced statewide. However, there are signs that the pace of growth may pick up as urban refugees migrate into Okanogan County and the entire NCW region in the wake of the pandemic.

Latino population represents an estimated 22% of all Okanogan County residents, below the NCW proportion of 29% but well above the state-wide 14% proportion. Latino representation varies widely across the county.

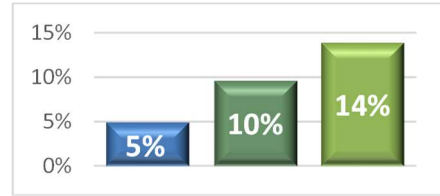
An estimated 11% of Okanogan County residents are **Native American** – well above the shares of the population for the larger NCW region or statewide. Native Americans comprise nearly 60% of residents living on lands of the Colville Reservation.

Residents of Okanogan County tend to be older than those of the greater NCW region or entire state. **Median age** of the entire Okanogan population is 43 years, but this ranges widely across various geographies of the county. An estimated 23% of Okanogan residents are age 65+ as compared with 20% for the NCW region and 17% across the state of Washington.

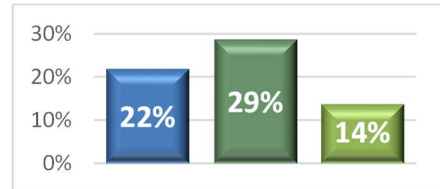
At \$51,600, **median household income** of Okanogan County is 14% below the comparable NCW median and 36% below the state. Within the county, median income for “white alone” households approximates \$52,100 as compared with \$49,100 for Latino and \$42,100 for Native American households. Households of two or more races have a median figure of \$61,800.

Of final note are comparative **labor force participation** rates. An estimated 55% of Okanogan County residents of age 16+ are in the labor force – either with a job or actively seeking employment. By comparison, 60% of NCW persons and 64% of residents 16+ statewide are in the labor force. In part, lower rates of labor force participation reflect an older population with higher proportions of retirees.

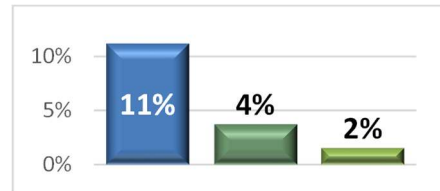
% Population Growth (2010-20)



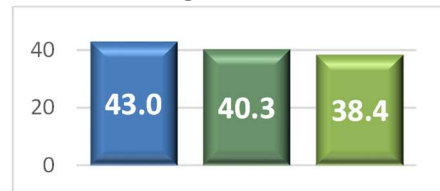
% Latino Population



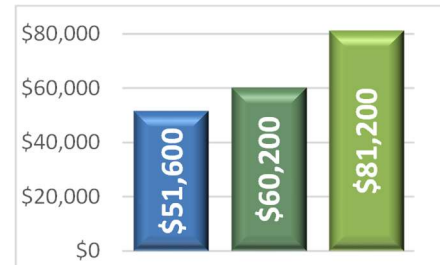
% Native American



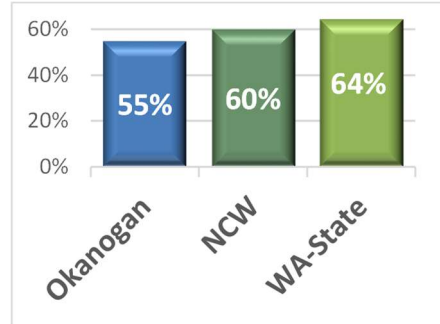
Median Age of Population



Median Household Income



% Labor Force Participation



Sources: WA-OFM, Environics/Claritas

Added Notes: Other notes regarding demographic data of significance for this Okanogan County CEDRS include the following:

Incomes:

- An estimated 14% of Okanogan County families have below poverty level incomes, above the 10% NCW rate and more than double the statewide 6-7% poverty rate.

Housing:

- The Okanogan County housing market is strongly oriented to single family housing, accounting for 73% of all residential structures as compared to 69% for the greater NCW region and 63% statewide.
- Also noted is that a relatively high 17% share of residences are mobile homes in Okanogan County, as compared with a NCW 13-14% share and just 6% statewide.
- Of occupied homes, 69% are owned by the occupants, above the ownership rates of 67% for North Central Washington and 64% for the entire state.
- At an estimated \$213,000, the estimated median value of all owner-occupied housing is 27% below the NCW median of \$293,000 and 49% below the statewide median figure of \$420,000. However, it is noted that housing values are reportedly increasing more rapidly over the last year, with substantial in-migration from urban areas of the Puget Sound and elsewhere.

Employment:

- Over 25% of the employed resident workers in Okanogan County (including those living on the Colville Reservation) are employed by a local, state or federal governmental agency – well above the NCW proportion of 17% and 15% for the entire state.
- Okanogan County also experiences relatively high rates of self-employment, accounting for an estimated 13% of workers as compared with a NCW figure of 12% and 10% statewide.
- Above average proportions of Okanogan County workers are employed in occupations of maintenance/protective services, construction, community/education/health support services, the sciences and production activity. Together these occupations account for about 38% of the employed work force as compared with 32% for the NCW region and 30% for the entire state.

ECONOMIC CONDITIONS

A focus of this CEDRS is on current conditions and changes in Okanogan County's economy. This analysis addresses trends pre-pandemic and, to the extent data is available, changing conditions through the 2020 pandemic and beyond as economic recovery has progressed.

An Economic Recovery Dashboard

The Economic Alliance is participating in an innovative initiative to construct a robust, continually updated database of on-going change to Okanogan County's economic conditions. Both NCWEDD and Okanogan County have created economic dashboards offering availability of *real-time* county-level data as the region undertakes the transition from pandemic to recovery.⁵

Much of the data provided is updated on a weekly or monthly basis. A priority has been to capture mobile data as for consumer spending and remote workers, and to promptly offer data to help EDD partners create accurate and up-to-date reporting and grant requests.

Datasets portrayed visually with the dashboard include the county's population and job trends and forecast, top occupations and jobs with in-demand skills, poverty trend by county subarea/race/educational attainment, monthly lodging and sales tax revenues, monthly unemployment and supplemental nutrition assistance program recipients, business participation in the federal Payment Protection Program (PPP), households receiving cash assistance, employment by industry, and COVID-19 incidence rates.

Employment Trends by Industry

Of particular significance for this CEDRS are both long-term and recent trends in employment by industry. Data from the Economic Recovery Dashboard are portrayed in detail by the graphic on the following page. Highlighted observations include the following:

- Per the Dashboard, as of 2020, there were an estimated 18,025 jobs in Okanogan County. Government accounts for 5,270 jobs (29% of county-wide employment), followed by agriculture and related natural resource employment, then retail trade. Together, these three sectors account for about two-thirds (66%) of all employment in Okanogan County.
- In the decade from 2009-19 (pre-pandemic), Okanogan County experienced a relatively modest net gain of 330 jobs. The sectors experiencing the greatest employment increases were health care and social assistance, followed by transportation and warehousing, government, arts/entertainment/recreation, and accommodation and food services. All other sectors experienced either little change or net job loss.
- The highest paid sector is government, with annual earnings averaging close to \$68,000 per employee. Other sectors paying above the average county-wide wage of about \$45,600 are health care/social assistance, transportation/warehousing, professional and related services, finance and insurance.

Okanogon County Employment Trends by Industry (Per Economic Recovery Dashboard)

9

Employment by Top Industries

Sortable by Column

| Industry | 2020 Jobs | 2009-2019 Jobs Change | 2009-2019 % Jobs Change | Avg. Earnings per Job |
|--|-----------|-----------------------|-------------------------|-----------------------|
| Government | 5,270 | 237 | 5.0% | \$67,924 |
| Agriculture, Forestry, Fishing and Hunting | 4,765 | -2 | -26.0% | \$32,494 |
| Retail Trade | 1,935 | -37 | -2.0% | \$35,183 |
| Health Care and Social Assistance | 1,707 | 332 | 24.0% | \$49,221 |
| Accommodation and Food Services | 1,215 | 54 | 5.0% | \$22,946 |
| Construction | 745 | -147 | -17.0% | \$44,354 |
| Other Services (except Public Administration) | 492 | -401 | -45.0% | \$26,348 |
| Transportation and Warehousing | 429 | 290 | 212.0% | \$47,957 |
| Professional, Scientific, and Technical Services | 360 | 4 | 1.0% | \$59,537 |
| Administrative and Support and Waste Management and Remediation Services | 334 | -3 | -1.0% | \$29,136 |
| Manufacturing | 326 | -58 | -15.0% | \$40,210 |
| Arts, Entertainment, and Recreation | 238 | 90 | 59.0% | \$27,217 |
| Finance and Insurance | 209 | -29 | -12.0% | \$56,407 |

Source: Emsi • [Get the data](#)



In addition to employment, other county-wide economic data of use for this CEDRS relates to sources of personal income, pandemic unemployment experience, retail trade and tourism.

Sources of Personal Income

Data of the U.S. Bureau of Economic Analysis (BEA) is useful to assess sources of personal income – notably focused on a comparison of sources for Okanogan County relative to the entire state of Washington.

As of 2018 (the most recent pre-pandemic year for which BEA data is available), sources of income county- and state-wide were distributed approximately as follows:

- Just under half (49%) of personal income in Okanogan County is derived from net earnings (wage and salary plus proprietors) versus 62% of income for Washington state.
- Dividends, interest and rents contribute 22% of county-wide earnings, roughly comparable to the 23% share statewide.
- Transfer payments from governmental sources account for 29% of personal earnings in Okanogan County, essentially double the statewide proportion of 14%.

Comparative Sources of Personal Income (2018)



Source: U.S. Bureau of Economic Analysis.

While not directly shown with the above graphic, it is noted that the experience of the three-county NCW region generally reflects a blend of the Okanogan and statewide mix of income sources.

To some extent, Okanogan County's experience reflects both the older age profile of the population (with a greater proportion on retirement including Social Security incomes) as well as greater poverty (with other governmental support payments). Since 2010, the proportions earned from net earnings as well as from transfer payments have declined somewhat while the proportion received from investment sources (such as dividends, interest and rents) has increased from 19% to 22% of county-wide personal income.

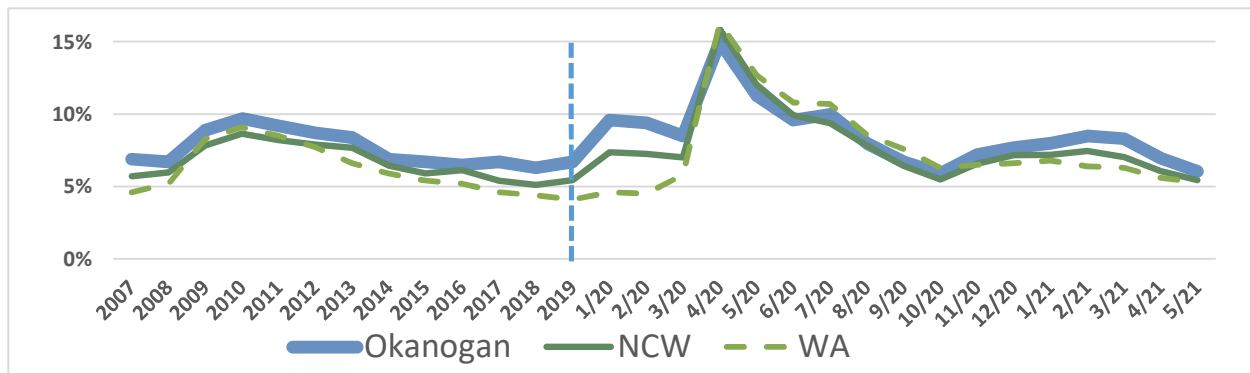
Pandemic Unemployment Experience

An important objective of this CEDRS is to address the experience of Okanogan County both prior to and through much of the pandemic – as one means of also assessing economic recovery and resilience. This is accomplished via two perspectives – a review of unemployment rate experience and tracking of labor force relative to employment trends.

In both instances, the analysis extends back to 2007 just prior to the Great Recession using annual average data through 2019, shifting to also show monthly experience starting in 2020.

Unemployment Experience. The county, region and state experienced unemployment increases from 2007-10, followed by reductions with recovery. However, the rate gap between the county as compared to the region and state started to widen about 2017, with Okanogan County exceeding NCW and statewide unemployment rates coming into the pandemic.

Comparative Unemployment Rates (2007-21)



Source: Washington State Employment Security Department (ESD).

Monthly rates for 2020-21 are not seasonally adjusted. Data for May 2021 is preliminary.

Somewhat remarkably, the county’s experience through the 2020 portion of the pandemic coincided closely with that of the NCW region and state – with unemployment peaking above 15% across all three geographies in April 2020, then declining through about October, before rising again – in part reflecting higher seasonal rates through winter months.

Unemployment in Okanogan County went from 5.9% in October 2020 up to 8.5% in February 2021. With spring hiring, county-wide unemployment dropped back to 6.1% as of May 2021, still somewhat above jobless rates of 5.5% for the NCW region and 5.3% statewide.

Labor Force & Employment Experience. Another way of viewing changes over this same 2007-21 time period is provided by the graph on the following page. This is of note because it helps to inform the question of how the resident labor force responds to changing levels of regional and county-level employment.

As with the unemployment analysis, annualized data is provided for the 2007-2019 period, with monthly data (seasonally unadjusted) provided for 2020 into the early months of 2021.

Okanogon County Labor Force & Employment Trend (2007-21)



Source: Washington State Employment Security Department (ESD). Data for May 2021 is preliminary.

From 2007-19, the number of unemployed workers in Okanogon County has ranged from about 1,300 to 2,100. Typically, changes in employment are followed (often with some time lag) by changes in labor force. When job levels decline, some individuals go on unemployment while others may exit the labor force altogether (whether temporarily or permanently).

Okanogon County’s labor force peaked at close to 21,900 in 2010, then dropped in the following three years as employment levels declined – but rose back up through 2016 before starting to decline yet again, even prior to the pandemic. As of 2019, the labor force had been reduced to about 20,400 – a drop of 1,500 persons either employed or actively looking for work over nine years.

The pandemic starting about March of 2020 led to increased volatility in both employment and labor force on a scale not seen previously. Employment plunged in April even as the county-wide labor force was increasing, suddenly with over 2,900 residents unemployed. With subsequent (largely seasonal) employment gains into the summer, the labor supply also expanded. But employment started to again decline coming into the fall and this time the labor force contracted even more sharply into November – a month before the end of 2020.

Since then, employment and labor force numbers have again increased. However, coming into the spring of 2021, the county-wide labor force stands at just under 19,350 – a reduction of more than 2,500 workers in the labor force experienced from 2010 through to May 2021.

By considering annualized data, seasonal factors are eliminated from the analysis. When comparing 2019 to 2020 annual averages, the net result has been a loss of 1,445 jobs (averaged over the entire year). Approximately 27% of this most recent year-over-year job loss can be accounted for by the overall annualized increase in unemployment. The remaining 73% of job loss represents former workers who are no longer in the labor force actively looking for work.

Going forward, a pivotal question is whether the multi-year labor force contraction coupled with pandemic effects represents a relatively permanent trend – especially with aging of the population – or might be potentially reversible with new job and/or in-migration opportunity.

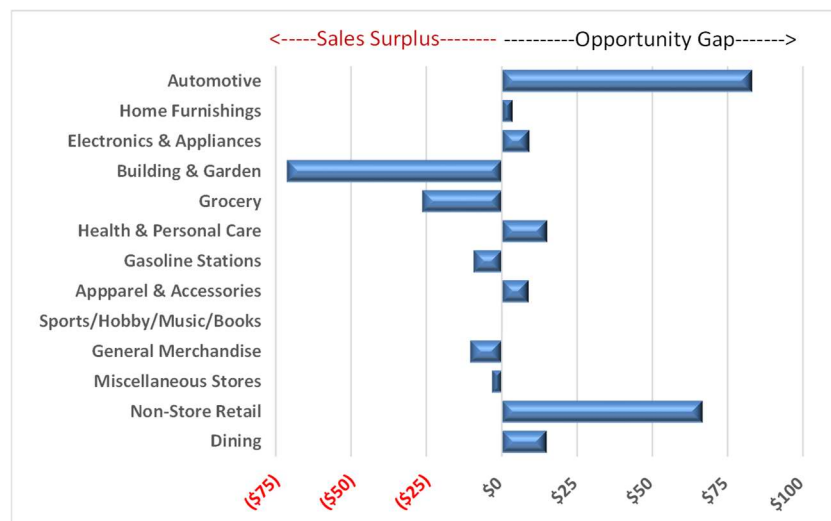
Retail Trade

As of early 2020 (pre-pandemic), retail including dining businesses in Okanogan County experienced total sales volume estimated at \$675 million. As resident-based consumer demand is estimated at \$755 million, the opportunity gap (or sales leakage) is approximately \$80 million, equating to 10-11% of locally generated demand.

Sales leakage occurs as local residents go elsewhere for more purchases than are received from tourists coming in. This relatively low level of net leakage for a rural county is indicative of the strong role that tourism (both domestic and Canadian) has played in supporting county-wide retail activity.

As illustrated by the graph to the right, retail categories that appear particularly strong include building and garden, grocery and general merchandise (including discount stores). Conversely, sales leakage is noted as most substantial for automotive and non-store retail – and to lesser extent as for electronics/appliances, health/personal care, apparel and dining.

Okanogan County Retail Sales Surplus & Opportunity Gap (In Millions of \$)



Source: Environics/Claritas (annualized data as of early 2020).

Non-store retail comprises primarily internet and mail order retailing. The data would suggest that relatively nominal sales for local retailers are being generated by internet sales activity. Environics/Claritas estimates that close to 12% of local purchasing power in Okanogan County was spent on out-of-area internet purchases pre-pandemic, increasing to about 14% as of early 2021.

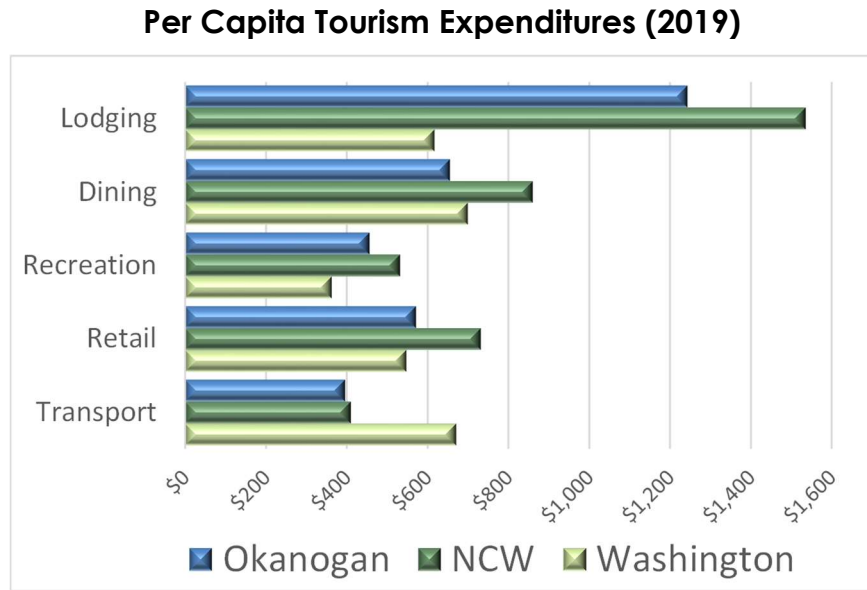
Also estimated is that total retail sales from in-county retailers have declined by about 10% in the one year from pre-pandemic conditions in early 2020 to early 2021. This sales decline reflects reduced purchases made by local residents and visitors.

Going forward, the best opportunities would be to focus on previously underserved categories as for apparel and dining – catering both to local residents and tourists as the pandemic eases and economic recovery takes hold. Apparel may represent a particular opportunity as recent data indicates pent-up demand for purchases foregone over the past year – involving both large format and smaller independent specialty stores.

Tourism

Data compiled for the Washington Tourism Alliance (WTA) indicates that Okanogan County tourism expenditures equated to over \$3,320 per resident in 2019 (pre-pandemic). This is about 82% of the \$4,070 per capita figure realized throughout the NCW region and 15% above the less than \$2,900 per capita expenditure figure realized state-wide.

As depicted by the graph, per capita tourism expenditures exceed the statewide average for lodging, dining, recreation and retail purchases – all but transport. With 647,000 visitors in 2019, tourism in Okanogan County accounted directly and indirectly for an estimated 1,650 jobs, \$53 million in labor income and \$15 million in state and local tax revenue.



Source: WA, Tourism Economics.

County-wide tourism spending increased by 20% from 2015-19, closely approximating a 21% tourism spending increase statewide but below the three-county NCW gain of 25%.⁶ Effects of the 2020 pandemic reportedly were experienced unevenly. The Methow Valley experienced new demand for outdoor getaways. North County lost Canadian visitors with border closures; this loss was at least partially offset by added outdoor travel.

The Cities & Towns of Okanogan County

Okanogan County can be considered as largely rural due both to geography and population. As of 2020, OFM estimates that 26,220 (or 61%) of residents live in the unincorporated areas of the county – with 16,910 (less than 40%) residing within its incorporated cities and towns.

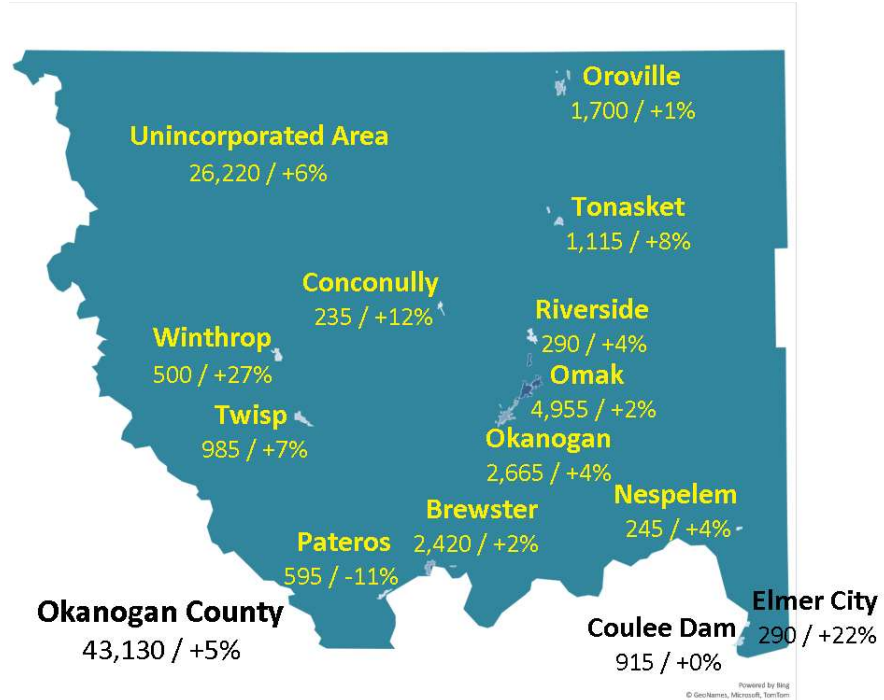
However, with 13 incorporated places, Okanogan County has an unusually high number of cities and towns relative to its overall population – the same number as much more populated Spokane County. There are only three counties east of the Cascades with more incorporated places – Grant, Whitman and Yakima Counties. On the west side, another three counties have more cities – King, Pierce and Snohomish, all of which are situated in the central Puget Sound.

The incorporated places of Okanogan County are relatively small – ranging from 235 in Conconully to no more than 4,955 in Omak (as estimated by OFM for 2020).

Incorporated Populations & Trends (Shown as 2020 Estimates & 2010-20 % Changes)

The distribution of 2020 population and changes in population from 2010-20 for each city and the unincorporated area are illustrated by the map graphic to the right.

Overall, the unincorporated areas of the county have experienced somewhat more rapid population growth than the incorporated communities over the last decade. However, some places have substantially exceeded the growth rate of the county overall (in % terms) – notably Winthrop (up by 27%), followed by Elmer City, Conconully, Tonasket and Twisp.



Source: WA, OFM

The 43,130 residents of Okanogon County are supported by an employment base of an estimated 18,025 in-county jobs. As population growth has been relatively modest, employment growth has also lagged, especially in recent years leading up to and through the 2020 economic downturn. Of particular note is that the resident labor force has contracted over the last decade – for reasons ranging from aging population to changing employment mix, and finally from a further pandemic-related reduction in active labor force participation.

All these factors affect the vitality and resilience of the county’s incorporated communities and its surrounding unincorporated geography. With so many smaller cities and towns having relatively low (but generally growing) populations coupled with stressed employment conditions, it can be challenging to keep pace with infrastructure and other governmental requirements.

The need for community re-investment is a topic to which this report will return – reflective of community input received as part of the CEDRS process. As an added step in the strategic evaluation process, this report now turns to a review of conditions and trends for each of Okanogon County’s five distinctive sub-county regions.

SUB-COUNTY PROFILES

Due to the large geographic area of Okanogan County and the diversity of the regions encompassed, with this CEDRS it is also useful to consider sub-county regions in more detail. Using Census County Division (CCD) geographies as determined by the U.S. Census Bureau, five county sub-regions have been defined for purposes of this CEDRS analysis:⁷

- **Central** – with approximately 13,800 residents as the most populated of the five sub-county regions, encompassing the Omak, Okanogan and the Conconully-Riverside incorporated communities.
- **East-CCT Reservation** – with an estimated 6,000 residents living on the Okanogan County portion of the Colville Confederated Tribes reservation lands, including the incorporated communities of Nespelem, Elmer City and the Okanogan County portion of Coulee Dam.
- **Methow Valley** – with approximately 6,400 residents as the geographically largest sub-county region including the incorporated communities of Twisp and Winthrop.
- **North County** – with 11,900 residents including the incorporated areas of Oroville and Tonasket.
- **South County** – with about 5,000 residents including the incorporated areas of Brewster and Pateros.

Demographic data (by place of residence) for this review comes from Environics/Claritas, a private data source for customized geographies using U.S. Census (including ACS-American Community Survey) data as of 2020/21. Employment data (by place of work) is from the U.S. Census *On-The-Map (OTM)* program, with the most recent data available as of 2018.

Preliminary observations as to potential sub-regional community priorities reflect results of a *Community Profile Survey* conducted by NCWEDD in cooperation with the Economic Alliance – also including in-person interviews the last week of May and in June 2021.

Each of these sub-county regions is considered separately on the pages which now follow. *Note:* With the graphs provided on the first page of each profile, the first burgundy bar represents the specific sub-county region considered, the second blue bar represents Okanogan County, and the third green bar is for the 3-county North Central Washington (NCW) region.

Central County Profile

With an estimated 13,800 residents, the Central area represents the most populated region of Okanogan County. The county's two largest cities – Omak and Okanogan – are located here as well as the smaller incorporated communities of Conconully and Riverside. Highway 97 access and central location make this a good location for retail, service and governmental functions that serve the entire county.

Demographics. Despite its larger existing population, the Central area has experienced **population growth** of only 3% over the last decade, well below county and NCW-wide rates of increase. An estimated 18% of residents are Latino, below the county-wide average of 22%. With proximity to the Colville Reservation on the east side of Omak, 7% are Native American.

At 41-42 years of age, the **median age** of Central area residents is slightly younger than the county median, slightly older than the greater NCW region. The area has somewhat higher proportions of both younger (less than 25) and older (75+ year) residents than the county.

At an estimated \$57,400, annual **median household income** is above the county-wide but below the NCW-wide median figures. About 15% of families have below poverty-level incomes, just above the county-wide proportion of 14%.

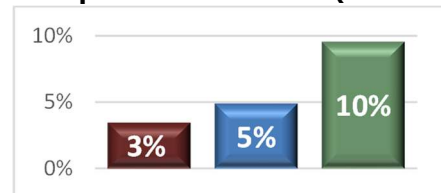
Employment. Of persons age 16+, the area's **labor force participation rate** is at 55%, on par with the county but below the NCW figure of 60% labor force participation. This reflects a relatively high rate of non-wage income, both in the form of retirement savings and transfer payments.

About 28% of residents employed have jobs in local, state or federal government positions – somewhat above the county-wide proportion of 25%. An estimated 56% of workers have *white collar* positions, the 2nd highest rate of the five Okanogan County sub-regions.

The Central County Region



% Population Growth (2010-20)



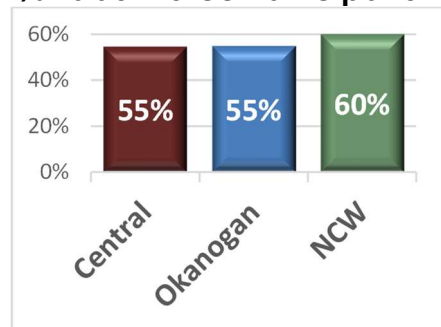
Median Age of Population



Median Household Income



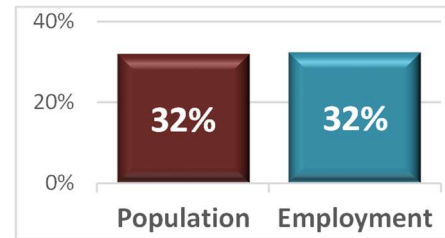
% Labor Force Participation



Sources: WA-OFM, Environics/Claritas

For this sub-county region, employment appears to be **roughly in balance** with population. With 32% of Okanogan County’s population, the Central County area accounts for an equivalent 32% of the county’s job base, as illustrated by the chart to the right. The Central area has also experienced the strongest job growth, accounting for an estimated 86% of net wage and salary job growth across Okanogan County from 2009-18, especially for governmental positions.

Central County Population & Employment as % of County



Sources: Environics/Claritas, Census OTM.
Data does not include self-employed.

For wage and salary workers, Census *On-The-Map* (OTM) information indicates that those working in the Central area tend to be in higher paying education and public sector jobs – albeit partially offset by the county’s highest proportion of lower paid retail workers.

Workers are predominantly White with relatively low Hispanic/Latino workforce – with the 2nd highest proportions of adult workers county-wide having educational attainment beyond high school (just below the Methow Valley). Approximately 56% of Central area wage and salary workers are female (highest of the five sub-county areas) – as compared to a roughly 50/50 female/male workforce balance county-wide.

Community Assets & Priorities. Based on survey results and interview conversations, key Central region assets include land for development, tourism potential, and the area’s central location for governmental, retail, and health care services. The biggest challenge may be lack of a coherent vision for future growth. There is interest in diversifying the local economy including for industrial and downtown area development but with need for expanded county-wide and regional involvement as for business recruitment. Most frequently mentioned priorities are to:

- Attract new business, grow tourism and welcome newcomers
- Stabilize and improve health care services
- Better engage the community and improve tribal coordination
- Expand workforce training and business technical assistance
- Provide support for grant writing and administration (here and county-wide)

Summary Notes. Of the five sub-county regions, the Central area comes closest to fitting the overall residential demographic profile of Okanogan County. The Central area also appears to achieve the best overall population-employment balance. However, a couple of points of divergence are noted – a below average rate of population growth in recent years and higher than average dependence on governmental and retail employment.

Due to its central location, there is opportunity and interest to diversify beyond the current mainstays of the local economy – predicated on ramped up community engagement and opportunities for regional partnerships. As a survey respondent noted, a “thriving economy” would look like an “unemployment rate below 3%, new store fronts downtown, happy people.”

East-CCT Reservation Profile

With an estimated 6,000 residents as of 2020, the entire East-Colville Confederated Tribes (CCT) area is wholly located within the Okanogan County portion of the Colville Reservation. This includes the three towns of Nespelem, Coulee Dam and Elmer City. Over three-quarters of reservation residents live on the Okanogan County portion of the reservation, with less than one-quarter in Ferry County.

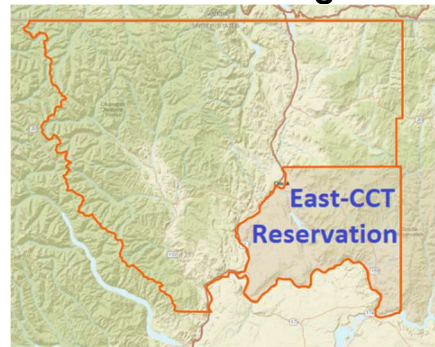
Demographics. As depicted by the chart to the right, the East-CCT region has experienced **population growth** of only about 1% since 2010, the slowest growing of the five sub-county regions profiled. An estimated 58% of East-CCT residents are Native American with 28% as White Alone and 13% as Latino.

At less than 36 years of age, the **median age** of East-CCT residents is considerably below county- and NCW-wide age levels – the 2nd lowest of the five sub-county regions. Above average proportions of the area’s residents are less than 55 years of age – with below average proportions of those age 55+.

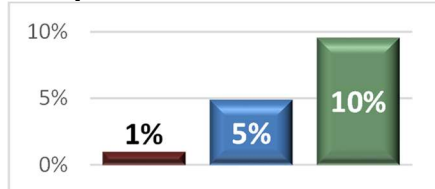
At an estimated \$44,500, annual **median household income** is 2nd lowest of the five sub-county regions (just slightly above median income levels of the North County area). About 20% of East-CCT families have incomes that are below poverty level, the highest proportion of the five regions – well above the 14% poverty rate experienced county-wide.

Employment. The East-CCT area is associated with a **labor force participation rate** of 55% – comparable to the county-wide rate for persons age 16+. Over half (53%) of all resident workers are employed by a governmental agency including tribal government – by far the highest rate for the five sub-county regions of Okanogan County. Due to the large geographic area encompassed by the reservation, average travel time to work is somewhat higher than for the other sub-county regions; the East-CCT area also has a relatively high rate of carpooling to work.

The East-CCT Region



% Population Growth (2010-20)



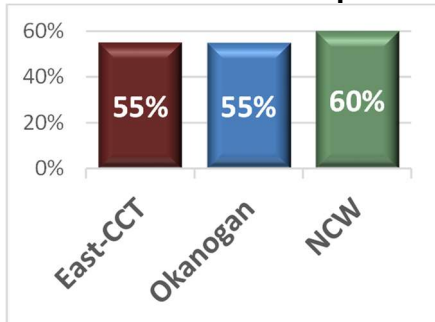
Median Age of Population



Median Household Income



% Labor Force Participation



Sources: WA-OFM, Environics/Claritas

As with the Central County area, the East-CCT area appears to be **roughly in balance** from a population/jobs perspective – accounting for 14% of population and a slightly higher 15% of wage and salary employment county-wide. However, the area appears to have experienced more net job loss from 2009-18 than any other sub-county region in Okanogan County.

For wage and salary workers (irrespective of place of residence), Census OTM information indicates that those working in the East-CCT area are more likely to be employed in higher-wage jobs (of more than \$3,333 per month) than is the case for any of the other four sub-county areas – with over half of all jobs accounted for by public administration plus health care and social assistance employment.

About 46% of workers in the East-CCT region are Native American and 48% White Alone with only 13% as Latino. About 55% of all workers are age 30-54 – highest of any sub-region. Work opportunities appear to be more limited for those age 29 or younger – at 15% the lowest proportion of the county’s five sub-regions. A majority of workers (54%) have some college or better and a similar 53-54% share of workers are male.

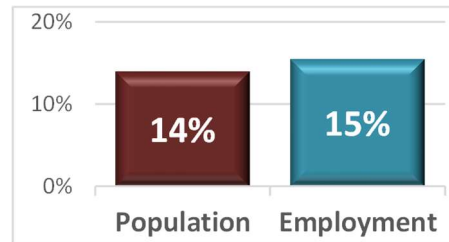
Community Assets & Priorities. The Confederated Tribes of the Colville Reservation (CTCIR) have an adopted Comprehensive Economic Development Strategies document, covering the 2017-21 period for the Reservation and the towns of Nespelem, Coulee Dam, Elmer City and Omak. The principal purpose of the strategy is to “facilitate the retention and creation of living wage jobs and to foster a stable and diversified regional economy, all for the intended outcome of maintaining and, ultimately, improving the quality of life in the CTCIR.”

Based on the adopted strategy and discussions with CCT tribal planning, priorities include:

- Broadband and communications infrastructure
- Assistance with roads and transportation infrastructure
- Former mill site redevelopment – as a master planned industrial park including set-asides for a clinic, head start, wellness center and ballfields
- Energy efficiency projects – as with woody biomass, solar, wind and hydro power
- Housing development and a farmers’ market for fresh fruits and vegetables

Summary Notes. Of the sub-county regions, East-CCT is most distinctive for its reservation status and predominant Native American population. While well balanced between the region’s share of population and employment, there appears to be some mismatch between a high proportion of good-paying (primarily tribal governmental) jobs but lower overall household incomes and high poverty rates. Opportunities also appear to be more limited for younger workers. A diversified and networked development program can serve to improve economic and quality of life for tribal residents and the nearby communities of Omak and Okanogan.

East-CCT Population & Employment as % of County



Sources: Environics/Claritas, Census OTM.
Data does not include self-employed.

Methow Valley Profile

With an estimated 6,400 residents as of 2020, the Methow Valley region encompasses the entire western portion of Okanogan County – much of which is forested and rugged mountain terrain. Populated areas are situated primarily along the SR-20 North Cascades highway corridor – including the incorporated cities of Winthrop and Twisp, an area known for active tourism and year-round recreation activity.

Demographics. An estimated 6% of Methow Valley residents are Latino, lowest of the five sub-county regions. As depicted by the chart to the right, the population of the Methow Valley has increased by about 8% since 2010, more rapidly than for the entire county but below three-county NCW regional **population growth** of 10%. Strong real estate activity since the start of the pandemic suggests the rate of population growth may increase in the years ahead.

At over 54 years of age, the **median age** of Methow Valley residents is by far the oldest of any of the five Okanogan County regions – also well above the NCW region median.

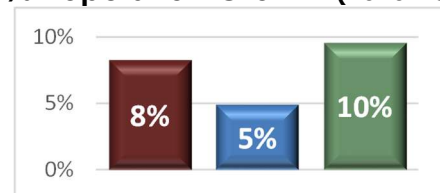
At an estimated \$59,300, annual **median household income** is highest of all five sub-county regions – also close to the NCW-wide median figure of \$60,200. Yet, the Methow Valley also experiences poverty, with a family poverty rate of 12-13% that is just below the county-wide poverty rate of 14%.

Employment. The Methow Valley is associated with a **labor force participation rate** of 51% – lowest of the sub-county regions and well below the NCW average of 60% labor force participation. This reflects a high rate of non-wage income – both in the form of retirement savings and transfer payments. An estimated 22% of workers are self-employed (as compared to 13% county-wide); these individuals are typically not included with estimates of wage and salary employment (covered by unemployment insurance).

The Methow Valley Region



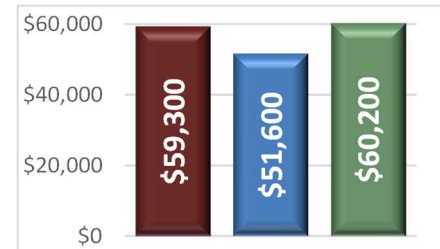
% Population Growth (2010-20)



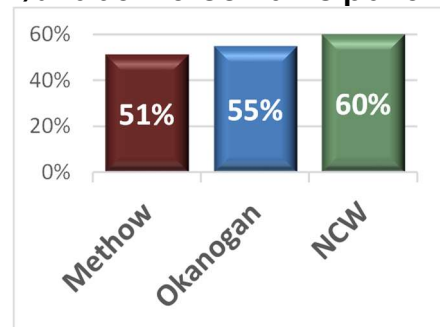
Median Age of Population



Median Household Income



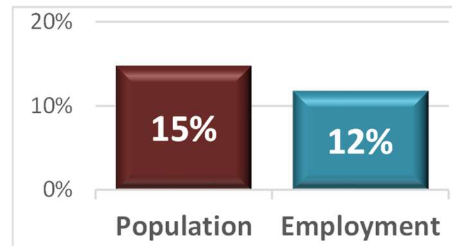
% Labor Force Participation



Sources: WA-OFM, Environics/Claritas

As noted, due in part to a population that is more oriented to self-employment and also a substantial proportion of retirees, the Methow Valley appears to be somewhat **under-represented** with wage and salary jobs relative to population. With 15% of Okanogan County’s population, the Methow Valley accounts for only about 12% of the county’s wage and salary job base – as illustrated by the chart to the right. Yet the Methow Valley has added more jobs than all but the Central Area in recent years, spread across a diversity of business and industry sectors.

Methow Valley Population & Employment as % of County



Sources: Environics/Claritas, Census OTM. Data does not include self-employed.

For wage and salary workers, Census OTM information indicates that those working in the Methow Valley tend to be in lower paying service jobs – particularly in the retail and accommodation/food sectors. However, the Methow Valley also has the highest proportion of higher paid construction workers of any of the five sub-county regions in Okanogan County.

Workers are predominantly White with a relatively small share of Hispanic/Latino workforce – and with the highest proportions of workers county-wide having educational attainment beyond high school. Approximately 55% of Methow Valley wage and salary workers are female, with 45% male – as compared to a roughly 50/50 female/male job balance county-wide.

Community Assets & Priorities. Key assets include hospitality, outdoor attractions, the U.S. Forest Service, fisheries, local schools, sustainable agriculture and self-employment work ethic. Cited is a tradition of “working together to solve big problems and preserve this place.” Major challenges are the lack of affordable housing including rentals and seasonal housing and a need to transition toward a green economy. Going forward, community priorities are centered on:

- Working together to understand the challenge and create affordable housing solutions
- Improving worker pay and benefits to better match the costs of Methow living
- Addressing issues of climate change and wildfire risk – also improved internet service

Summary Notes. Of the five sub-county regions, the Methow Valley is the most dissimilar from the rest of Okanogan County – in terms of both demographics and employment. The Methow Valley is growing, with higher income households and higher educational attainment but also more reliant on tourism than the rest of the county – also with strong job growth.

Conversely, this is the least diverse subcounty region, with the oldest population, and lowest active labor force participation. Those working locally are more likely to be in lower paid service jobs. Out of area and self-employment incomes are important to offset what is otherwise a lower wage Methow Valley economy, albeit with greater dependence on health care and related services for a higher proportion of older residents. In the words of a survey respondent, a thriving economy will involve “food and housing security and the opportunity to thrive doing meaningful work ... compensated enough to enjoy the beauty of where they live.”

North County Profile

With an estimated 11,900 residents as of 2020, the North County region is the 2nd most populated of the five sub-county regions. This area encompasses the northeastern quadrant of Okanogan County – most of which area is lightly populated except for the Highway 97 corridor and Okanogan River oriented communities of Tonasket and Oroville. Tourism, especially from neighboring Canada, is of particular importance for these communities.

Demographics. As depicted by the chart to the right, the population of the North County has increased by about 8% since 2010, more rapidly than for the entire county but below the three-county NCW regional **population growth** factor of 10%. Strong real estate activity through the pandemic suggests the rate of population growth may increase in the years ahead.

At nearly 48 years, the **median age** of North County residents is second only to the Methow Valley – well above both the median age figures for the county and NCW region. Persons age 55 and up comprise 42% of population as compared with 37% county-wide.

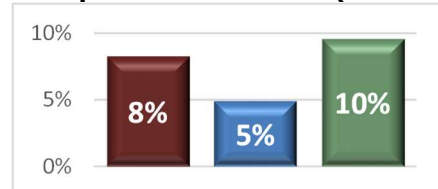
At an estimated \$44,100, annual **median household income** is lowest of all five sub-county regions – nearly 15% below the county and 27% below the NCW medians. However, the North County family poverty rate is 12%, somewhat below the county-wide rate of 14%. Lower incomes appear to reflect lack of local job opportunities coupled with higher retirement rates.

Employment. The North County area is associated with a **labor force participation rate** of 53% for adults age 16+ – a rate below both the county and NCW averages. In addition to an above average proportion of retirees, the area’s workforce includes a 16% self-employment rate – above the county-wide average of 13% and the NCW rate of just under 12%. About 8% of workers work at home, just above the county-wide average of 7%.

The North County Region



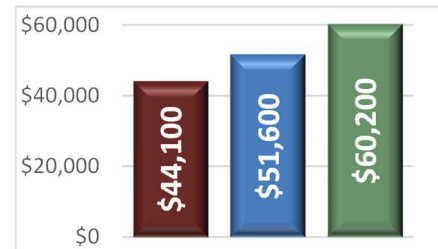
% Population Growth (2010-20)



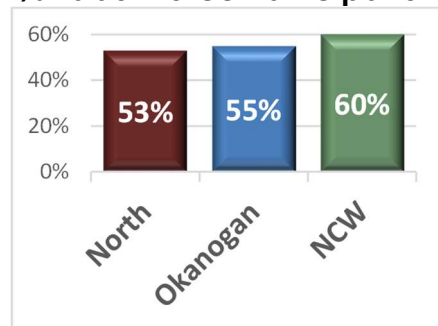
Median Age of Population



Median Household Income



% Labor Force Participation

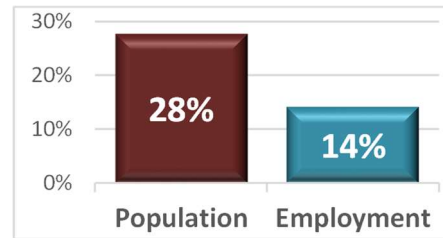


Sources: WA-OFM, Environics/Claritas

Of the five sub-county regions, the North County area appears to exhibit the **greatest imbalance between population and employment**. With 28% of county-wide population, the North County accounts for only 14% of its wage and salary employment base.

While this is due in part to a population that is more oriented to self-employment and also a substantial proportion of retirees, it still suggests a relative lack of local job opportunity. The North County has also experienced net job loss in recent years, especially in natural resource related industries.

North County Population & Employment as % of County



Sources: Environics/Claritas, Census OTM.
Data does not include self-employed.

For wage and salary workers, Census OTM information indicates that those working in the North County tend to have a greater proportion of lower paying jobs and a lesser share of higher paying jobs than is the case county-wide. Compared to all of Okanogan County, relatively high proportions of North County jobs tend to be in mining, retail trade, transportation and warehousing, and educational services.

Over 90% of workers are White Alone with 18% Latino (which can be of any race). Just under half of adult workers have educational attainment beyond high school. The employed workforce is approximately 52% male, 48% female.

Community Assets & Priorities. North County assets are cited as including outdoor recreation, agriculture, grocery stores and a mill for Oroville, and a mix of health care, agricultural, logging and retiree relocations for Tonasket. Challenges are for new leadership with concerns ranging from drug abuse to lack of primary industry. Priorities include:

- Desire for increased community engagement and positive opportunities for youth
- Industry recruitment, downtown development and expanded tourism opportunity
- Town and parks maintenance, guide services, trails and destination development

Summary Notes. While the Methow Valley and North County are both showing the most rapid population growth, these two sub-county regions appear to be serving different demographics – with North County showing a distinctly lower income profile. Both areas appear to be under-represented with wage and salary employment, but with relatively high rates of self-employment. Like the Methow, the North County also experiences the retail effects of tourism, but less so with respect to accommodation and food services.

When asked what a “thriving economy” would look like, a respondent from Oroville suggested “businesses able to keep consistent days and hours year-round, life and energy in our community.” A respondent from Tonasket suggests “thriving primary industry and all the trickle-down industry from there, (also) not having a majority of the population needing to travel to another town to work.”

South County Profile

With an estimated 5,000 residents as of 2020, the South County is the least populated of the five sub-county regions of Okanogan County – including the incorporated communities of Brewster and Pateros. The area is served both by the Highway 97 and SR-20 North Cascade highway corridors – and remains strongly agricultural, benefiting from respective confluences of the Okanogan and Methow with the Columbia River system.

Demographics. As illustrated by the chart to the right, the South County experienced **population growth** of only 2% over the last decade – 2nd lowest of the five sub-county regions. Population of the South County is 63% Hispanic/Latino – well above the county-wide proportion of 22% and NCW proportion of 29%.

At less than 34 years, the **median age** of South County residents is the youngest of any of the five Okanogan County sub-regions – also well below the NCW region median. About 55% of area residents are under 45 years of age, as compared with 46% county-wide.

At an estimated \$54,300, the annual **median household income** is 5% above the county-wide but 10% below the NCW median. The median income of South County Latino households is \$48,900 – approximately 90% of the median for all area households. About 12% of families have below poverty level incomes, a rate that is less than the county-wide poverty rate of 14%.

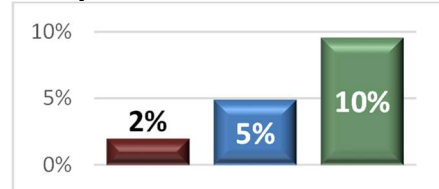
Employment. The South County is associated with a **labor force participation rate** of 66% – by far the highest of the other sub-county regions and well above even the NCW average of 60% labor force participation for persons age 16+.

Over two-thirds (68%) of those employed are in blue collar, service and farming occupations, as compared to less than 50% county-wide. South County workers are also more likely to walk or carpool to work than their counterparts elsewhere in Okanogan County.

The South County Region



% Population Growth (2010-20)



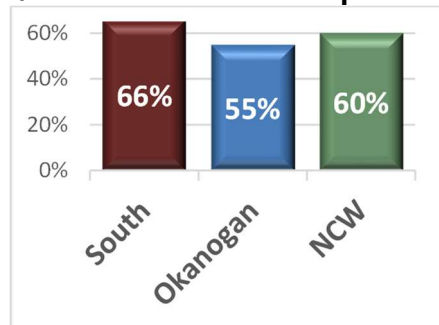
Median Age of Population



Median Household Income



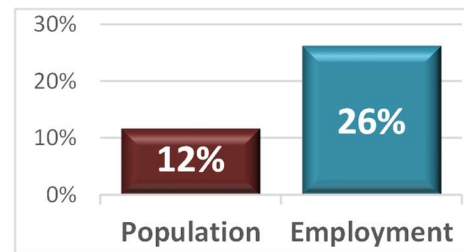
% Labor Force Participation



Sources: WA-OFM, Environics/Claritas

South County is far more **oriented to employment** than the other sub-county regions of Okanogan County. With 12% of the population, South County accounts for 26% of all wage and salary employment covered by unemployment insurance. The local job base has expanded in recent years – primarily in sectors of agriculture, transportation/warehousing and retail but with some offsetting job loss in other sectors of the local economy.

South County Population & Employment as % of County



Sources: Environics/Claritas, Census OTM.
Data does not include self-employed.

Census OTM information indicates that over 71% of wage and salary workers in South County are employed in agriculture (together with other natural resource industries). This is 2½ times the 28% share of all employment in these industries county-wide. South County has the highest share of workers county-wide with earnings in what the U.S. Census classifies as a middle tier wage range of \$1,251 to \$3,333 per month.

An estimated 44% of those working in South County are Latino. While 28% of workers have less than high school education as compared to 16% county-wide, over 40% of South County’s adult workers have educational attainment of some college or better. By gender, those employed are approximately 58% male/42% female workers.

Community Assets & Priorities. Assets cited include the apple and agriculture industries, tourism with recreation opportunities, the confluence of the Methow and Columbia Rivers, and emphasis on family. Challenges relate to lack of economic diversity, retail businesses, infrastructure and affordable housing. Community priorities for Brewster and Pateros are for:

- Attracting good paying industry and a more diverse set of downtown businesses
- Housing affordable to area residents and workforce, coupled with “technology equity”
- Street and water infrastructure with more properties for new industry and housing

Summary Notes. Of the five sub-county regions, South County is most distinctive for its substantial Latino population together with a continued strong agricultural and work-focused orientation, offering mid-level wage and income opportunities. While local population is increasing slowly, the existing population base is younger than elsewhere in the county – offering solid prospects for continued if not improved *home-grown* economic vitality in the years ahead.

When asked about vision for the future, a Brewster survey respondent advocates to “diversify the business district to allow for the down years.” In response to a similar question about what constitutes a thriving economy, a Pateros respondent describes a potential future with “less poverty, more local service delivery, safe and affordable housing, high quality public education, access to health care for all, youth engaged in positive activities.”

III. SWOT ANALYSIS

Based on data compiled together with on-going activities of the Economic Alliance and associated community input, it is useful to take this CEDRS a step further – to assess strengths, weaknesses, opportunities and threats affecting the continuing and/or changing economic development of Okanogan County.

SWOT PROCESS

Key elements of the SWOT process may be defined as follows:⁸

- **Strengths** – as the county’s relative competitive advantages, often internal to the characteristics of the local community or region.
- **Weaknesses** – relative competitive disadvantages, also often internal in nature.
- **Opportunities** – prospects for sub-county or county-wide regional improvement or progress, often driven by global trends external to Okanogan County.
- **Threats** – as potentials for negative impacts or economic decline, also often coming from sources external to the county.

The assessment of strengths and weaknesses may be viewed as focused on recent trends and existing conditions, addressing the question: *Where are we now?* Opportunities and threats are more future-oriented to answer the next question: *Where could we be going forward?*

Strengths, weaknesses, opportunities and threats are not necessarily of equal importance. Significance can vary by location and the industry, business sector, or community affected. Effective economic development strategies are those that build on strengths and opportunities, while concurrently working to mitigate addressable weaknesses and threats.

This SWOT is intended to serve as a bridge to the CEDRS action plan – both for county-wide and community initiatives and for investment priorities of pertinent federal and state programs. At its best, the SWOT serves as a dynamic rather than static document. Individual elements of the SWOT may be amended or refined with future CEDRS updates.

For Okanogan County and the greater NCWEDD region, this is of considerable importance as new opportunities as well as challenges for the county and its diverse communities emerge from the COVID pandemic with potential for as-yet unforeseen challenges to economic recovery and future resiliency.

SWOT SUMMARIZED

A SWOT summary is provided on the following two pages. The first page identifies strengths, weaknesses, opportunities and threats generally applicable across the **entire county**. A second page provides added detail for elements distinctive to each of the **five sub-county regions**.

Overview of Okanogan County Strengths, Weaknesses, Opportunities & Threats (SWOT)

| Topic | Strengths | Weaknesses | Opportunities | Threats |
|------------------------------|---|--|---|--|
| Geography | <ul style="list-style-type: none"> • Diversity of natural setting • Okanogan, Methow & Columbia River system | <ul style="list-style-type: none"> • Inconvenient access to major population centers • Challenge serving small & geo-isolated communities | <ul style="list-style-type: none"> • Growing attraction of non-urban recreation & living • Marketing of live-work-recreate lifestyle | <ul style="list-style-type: none"> • Vulnerability to extreme weather & fire events • Uncertain cross-border access with Canada |
| Demography | <ul style="list-style-type: none"> • Methow Valley & North County population growth • Diversity of East-CCT & South County populations | <ul style="list-style-type: none"> • Older population & below average incomes • Challenge of attracting young, mobile workforce | <ul style="list-style-type: none"> • Renewed urban refugee draw (pandemic & beyond) • New households w/higher incomes & entrepreneurs | <ul style="list-style-type: none"> • Retention of youth • Increased housing prices & reduced affordability |
| Economy | <ul style="list-style-type: none"> • Strong natural resource based tradition • Entrepreneurial ethic • Economic resilience thru wildfires, pandemic & temporary job loss | <ul style="list-style-type: none"> • Eroding labor force & employment trends • Weak critical mass & retail business consolidation • Tourism impact of COVID • Limited industrial sites | <ul style="list-style-type: none"> • Repositioning tourism & small town business • Tribal development • Entrepreneurial eco-system • Tourism value capture • Capital for entrepreneurs | <ul style="list-style-type: none"> • Workforce & real estate effects of automation and shift to work from home • Long-term downsizing of locally-driven retail & service business base |
| Infrastructure | <ul style="list-style-type: none"> • US 97 N/S & SR-20 E/W North Cascades highways • Thirteen dispersed small towns with base capacity | <ul style="list-style-type: none"> • No direct year-round access to Puget Sound • Limited rural broadband • Challenged water resources | <ul style="list-style-type: none"> • Full coverage broadband • Localized telemedicine • Federal stimulus funding for infrastructure upgrades | <ul style="list-style-type: none"> • Inadequate emergency transportation & communication access • Health care vulnerability to pandemic/full-service need |
| Housing | <ul style="list-style-type: none"> • Wide range of housing options & pricing | <ul style="list-style-type: none"> • Limited workforce & mid-range affordable housing | <ul style="list-style-type: none"> • Public/private partnerships scaled up to meet demand | <ul style="list-style-type: none"> • Demand too dispersed to achieve economies of scale |
| Education | <ul style="list-style-type: none"> • Good base of high school skills + some college | <ul style="list-style-type: none"> • Workforce readiness for higher tech business needs | <ul style="list-style-type: none"> • Virtual education linkages w/ institutions statewide | <ul style="list-style-type: none"> • Risk of future displacement of lower skill workforce |
| Partnership Resources | <ul style="list-style-type: none"> • Economic Alliance & NCWEDD partnerships • U.S. Canada border X-ings • Opportunity Zones | <ul style="list-style-type: none"> • Challenged B2B networking • Need for more tribal & community partnerships • Pandemic closing of border | <ul style="list-style-type: none"> • Business referral services • Business retention, expansion & recruitment • Local & external marketing | <ul style="list-style-type: none"> • Prolonged pandemic and/or wildfire periods • Increased funding needs with declining resources |

Okanogon Sub-County Regional Strengths, Weaknesses, Opportunities & Threats (SWOT)

| Region | Strengths | Weaknesses | Opportunities | Threats |
|-----------------------|---|---|---|--|
| Central County | <ul style="list-style-type: none"> • The <i>go to</i> place for retail & services for entire county • Strongest job growth in county since 2009 | <ul style="list-style-type: none"> • Weak population growth • Displacement of local business due e-commerce | <ul style="list-style-type: none"> • Diversification to creative, professional & B2B services • More residential growth | <ul style="list-style-type: none"> • Loss to larger urban areas of some retail stores, decentralization of others • Health care consolidation |
| East-CCT | <ul style="list-style-type: none"> • Land mass, scale & diversity of tribal enterprises • Capacity for complex deals • East Grand Coulee Dam anchor & Spokane access | <ul style="list-style-type: none"> • Overdependence on tribal government & enterprises for resident employment • Job loss in last decade, especially government-related | <ul style="list-style-type: none"> • Diversified community & economic development partnership investments • Collaboration with adjoining non-tribal communities | <ul style="list-style-type: none"> • Lack of meaningful wage entry-level jobs, housing & childcare services • Potential loss of tribal heritage & sense of place |
| Methow Valley | <ul style="list-style-type: none"> • Appeal to high income Puget Sound refugees • Strong entrepreneurial tradition • #2 sub-region in job growth across diverse sectors | <ul style="list-style-type: none"> • Aging population with limited diversity • Limited affordable housing • Winter closures of highway access to Puget Sound | <ul style="list-style-type: none"> • North Cascades highway as re-branded tourism driver • Achieving increased tourism business that reinforces local community • Mixed-income housing | <ul style="list-style-type: none"> • Continued wildfire risk • Further reduction of housing affordability for long-time residents & service workers |
| North County | <ul style="list-style-type: none"> • Attractive, affordable residential communities • Natural resource & small business tradition | <ul style="list-style-type: none"> • Net job loss in last decade, especially natural resource industries • Current limited local high wage job opportunities | <ul style="list-style-type: none"> • U.S. Canada border re-opening & re-branding • Space for industrial facility development? • Amenity improvements | <ul style="list-style-type: none"> • Limited options for youth engagement • Potential over-reliance on Canadian tourism market |
| South County | <ul style="list-style-type: none"> • Strong agri-business anchored economy • Job growth in last decade for agriculture, warehouses, retail | <ul style="list-style-type: none"> • Job losses in recent years in all but ag & retail-related economic sectors • Limited downtowns despite Highway 97 traffic | <ul style="list-style-type: none"> • Ag-tech innovation (large & cooperative small-scale) • Large site industrial • Recreation/lodging uses | <ul style="list-style-type: none"> • Housing & technology equity gaps • Risk of orchard migration to Columbia Basin |

Note: This SWOT overview is preliminary and subject to revision in response to reviewer comments and community input.

IV. RECOVERY, RESILIENCE & DIVERSITY

From the data and SWOT reviews, two questions are important to address going forward:

What are the key take-aways from this summary background review and SWOT analysis? And what are the implications for this Okanogan County Comprehensive Economic Development and Recovery Strategy (CEDRS)?

With this CEDRS, these questions can be addressed from the strategic perspectives of economic recovery, resilience and diversity – each considered in turn.

ECONOMIC RECOVERY

Over the last 10-20 years, the need for economic recovery – often due to unforeseen events – has occurred in some cases county-wide, in others more at a sub-county level. Examples of events affecting business vitality and employment have included:

- **Wildfires** – impacting different areas of the county in different years, but most notably the Methow Valley region with loss of life and property.
- **Decline of natural resource-based industries** – including forest-based, mining and orchard industries in the North County.
- **COVID-19 pandemic with associated economic instability coupled with housing exceeding availability** – affecting small businesses across all areas of the County, most noticeably the Methow Valley due to telecommuter/second home appeal and North County due to closure of the Canadian border crossing.

Patterns of recovery have varied depending on the location and nature of the economic downturn. Wildfire effects have been pronounced but often short-lived, causing residents to leave, businesses to close and tourists to cancel plans. Repeated incidents may have dampened appeal for peak season tourist activity due to concern over on-going fire hazards.

The decline of natural resource-based industries has occurred less suddenly but over a longer period of time. As yet, there appears to be no clear offset, at least for the North County area. Other sub-county regions appear to have adapted better – as with the South County’s continued ag-based dominance and transition to organic and sustainable agriculture in the Methow Valley. This speaks not only to recovery but to longer-term economic resiliency.

Economic effects of the pandemic were sudden and unevenly experienced – especially over the spring and summer of 2020. Substantial job recovery has since occurred, at least when measured in terms of unemployment rates (for those covered by unemployment insurance). The picture is less clear for labor force participation – suggesting an erosion of the number of persons who are employed or available to work. Recovery has been challenging for the tourism industry – experiencing resurgent demand but with labor shortages coming into the 2021

summer season. Ending of eviction moratoria may exacerbate the housing shortage, especially for lower income households with pandemic related job loss.

Economic assistance will be most needed for those sectors of the economy and communities of Okanogan County where recovery is not readily forthcoming on its own, even with reasonable steps toward mitigation. Project initiatives to assist with economic recovery represent a high priority for the CEDRS action plan.

RESILIENCE

The concept of economic resilience goes beyond recovery. It addresses the question of: *What does it take to withstand or avoid an economic shock altogether?*

The need for a strategy focused on resiliency is most apparent for addressing the continuing risk of uncontrolled wildfires. Causes are cited variously as including factors such as forest management, rural area development, and broader climate change. Reaching reasonable consensus as to appropriate measures for mitigation, protection and recovery is most important as a means to reduce on-going community, economic and environmental risks.

With respect to natural resource-based industries, resilience via adaptation has been most apparent to date in the sub-county areas of the Methow Valley and South County. Project initiatives suitable for consideration would involve business planning aimed to capitalize on most promising industry niches accompanied by supporting business capital, infrastructure and workforce investments.

To address continuing or resurgent issues as may be associated with the COVID or similar future pandemics, key priorities would appear to cover initiatives as might be related to continued public health measures as for vaccination and telemedicine – especially for underserved populations and areas of the county.

A key initiative supporting long-term resiliency across issues involving wildfire, industry change, and public

COVID EXPERIENCE

Respondents to the NCWEDD / Economic Alliance Community Profile Survey were asked to describe their community's leadership with handling of the COVID-19 pandemic.

In Okanogan County, responses were generally typically positive exemplified by the respondent who said that: "The various healthcare agencies did an extremely great job. Economic Development Committee provided excellent grants to small businesses. Public Health outstanding."

However, concerns were expressed about some city and county response including a community where masking and social distancing was not widely practiced.

A Methow Valley respondent noted that "the political and polarizing nature of COVID has put a strain on all of us. The Town of Twisp developed a BEE (be empathetic to everyone) campaign to try to help."

This experience exemplifies the value of shared community response for recovery and resilience.

health is the need for improved internet and broadband service – reaching to cover as much of the county’s population as quickly as reasonably possible. This appears likely to involve different approaches in different sub-county regions – as best suited to area terrain and concentrated or dispersed locations of population and economic activity.

Review and revisions to county-wide and local jurisdiction land use plans may also become of greater priority, with a 2027 date for land use plan updates for Okanogan and other counties that are partially planning under the Growth Management Act (GMA). Topics of importance to economic development may cover such items as adequacy of industrial and commercial lands suitable for development, housing diversity and affordability, and wildfire mitigation.

DIVERSITY

Okanogan County is distinctive both for its geographic size and diversity of community. As one respondent to the Community Profile Survey noted: “Each community has different things to offer, all are located in a beautiful place with ready access to outdoor recreation.” Another respondent has focused on the assets of “natural resources, the great outdoors.” Yet another cites: “Available land, fiber up Highway 97, good work ethic from long-standing residents, influx from areas of higher earners.”

Bottom line, Okanogan County is fortunate to experience diversity not only of geography and entrepreneurial business activity, but also of age, race and ethnicity as experienced in varied sub-county regions. Individual sub-county areas often are more homogenous than diverse and are geographically distanced. This reality of county-wide diversity versus localized clustering poses both opportunities and challenges for economic and community vitality:

- **Central County** – benefits the entire Okanogan region by clustering retail and governmental services that require economy of scale from a location central to serve the entire county. This sub-county region has experienced strong job growth but sub-par new residential development as a place to live. And the area could benefit from a job base that diversifies beyond its historically significant governmental and retail base.
- **East/CCT** – is home primarily to Native American residents but with a substantial 42% of different racial/ethnic backgrounds including those living in the on-reservation incorporated places of Nespelem, Coulee Dam and Elmer City. The area benefits from a young population but may be limited by over-concentration of tribal agency employment with fewer opportunities for younger workers and high poverty rates.
- **Methow Valley** – has the highest incomes and strong entrepreneurial bent but is least diverse with the oldest population and lowest proportions of racial/ethnic populations, also underserved with wage and salary employment. The older age profile coupled with smaller workforce may increase dependency on health and social services.
- **North County** – is growing in population for an older age profile and more affordable housing but with job growth not keeping pace. There is the risk of overdependence on Canadian tourism but with added pandemic-induced domestic outdoor recreation appeal offering potential for greater long-term value-added benefits.

- **South County** – a majority Latino sub-county area with the youngest population of the sub-county regions – also the highest labor force participation. The area is strongly ag-oriented but with low population growth – indicating less attractiveness as a place to live. Opportunities may improve as the area matures and diversifies in the years ahead.

While each of these sub-county regions may benefit from greater diversity of population and/or employment, it is not expected that these areas will change to the extent of matching the overall diversity of the county. The **distinct attributes** of each area mean that each continues to build on its comparative strengths while also addressing weaknesses when and where possible.

Projects that encourage **collaboration** between adjoining sub-county areas represent an opportunity for expanded economic and community development. This could occur by initiatives ranging from expanding markets served by local businesses, non-profits and public agencies to increasing tourist lengths of stay to drawing from broader sources of appropriately skilled labor – also for cooperative infrastructure investments.

Another opportunity for collaboration arises in the search for and administration of grant-funded economic development and infrastructure projects resulting from current and potential federal stimulus programs. The Community Profile Survey asked questions regarding access to a city planner, grant writer, prior applications and awards of federal funds, and interest in learning about federal funding opportunities.

The answers provided are encouraging but yet missing the full potential of added funding:

- A clear majority of respondents indicate that their communities have applied for and are interested in federal grant funding; most also indicate that their communities have received federal funding.
- Most jurisdictions appear to have some form of planning staff support.
- However, about half of respondents indicate that their jurisdictions do not have a grant writer on staff or contracted.

Further discussion with many of these Okanogan communities indicate that, even for those with limited grant writing resources, there is often even greater concern with the challenge to properly manage and administer grant resources. There is concern with the potential of inadvertently falling short of meeting federal administrative and reporting requirements – often with differences in reporting needs depending on the specific grant or loan program involved.

While some larger jurisdictions have in-house grant writing and/or administrative resources, the new rush of funding opportunities now increasingly reaches beyond local staffing resources. Both in communities with and without existing staff support, there appears to be broad interest in supplemental grant related staffing support as might be provided on a cooperative basis. One possible approach would be for organizations such as NCWEDD and/or the Economic Alliance to consider serving as an added resource – especially for projects associated with clear economic development benefits locally and regionally.

V. STRATEGIC DIRECTION/ACTION PLAN

As with many other comprehensive economic development planning processes state-wide and nationally, the purpose of the foregoing background information is to set the stage for determination of a strategic direction and then a more detailed action plan for Okanogan County. Strategically, the key question is: “*Where do we want to go?*” And then once that is determined, the next question for the action plan is “*How do we want to get there?*”

STRATEGIC DIRECTION

The strategic direction taken by the Economic Alliance and participating governmental agencies and other organizations is intended to address the question of: *Where do we want to go?*

This strategic approach is consistent with the organizational roles of the Economic Alliance as Associated Development Organization (ADO) and Small Business Development Center (SBDC) for Okanogan County, as well as providing administrative support for the Okanogan County Tourism Council (OCTC). On behalf of the Okanogan County Board of Commissioners, the Economic Alliance Infrastructure Committee also is responsible for annually recommending and updating priority infrastructure projects and economic development project priorities for review and approval by County resolution.

The strategic direction for this CEDRS also is intended to reflect the vision and the mission of the Alliance as described at the beginning of this document, again articulated as follows:

Vision

The Economic Alliance envisions the citizens and communities of Okanogan County working together to bring prosperity to all.

The Mission

Facilitate partnerships with private, government, and tribal entities that will create an environment to nurture, support and recruit businesses and industry in Okanogan County.

Implementation Time Frames

In recent years, the Okanogan County Commissioners have annually adopted updated public infrastructure and economic development priorities. Continued prioritization of immediate and near-term priorities through this process remains a feature of the CEDRS process going forward.

This economic development and recovery strategy is also intended to take a longer-term perspective – looking forward over the next 5-10 years, incorporating as much input from community leaders/businesses as is currently possible. What follows represents a combination of both short-term (2021) and recommended 5-10 year strategic action priorities.

CURRENT ACTION PLAN

With this 2021 CEDRS, the action plan is outlined to include adopted Okanogan County infrastructure and economic development priorities together with work plan and further action objectives as subsequently identified by the Economic Alliance.

Adopted Infrastructure & Economic Development Priorities

By Resolution 161-2020 dated December 1, 2020, the Okanogan County Commissioners adopted the most recent 2021 public infrastructure and economic development priorities. Infrastructure projects are subject to further prioritization by NCWEDD at the 3-county regional level and would qualify for 0.09% sales and use tax funding if the project secured additional non-county funding resources. The Commissioners current priority listing is as follows.

2021 Okanogan County Public Infrastructure Prioritization List

1. Omak Municipal Airport Development
2. Pateros Mall Renovations
3. Tonasket Perfect Passage
4. Pateros Star Road Development
5. Omak Shumway US 97 Development
6. Brewster Broadband Initiative
7. Tonasket South Annexation
8. Chief Tonasket Park South Annex
9. Tonasket Public Library
10. Old 97 Hospital Way Street Redevelopment

2021 Okanogan County Community/Economic Development Project Prioritization List

1. Pateros/Brewster Community Resource Center Building Purchase
2. Pateros/Breaster Community Resource Center South County Community Kitchen
3. Tonasket Art Project

Of the 10 infrastructure projects, seven were selected by NCWEDD with its top 10 list of 3-county priorities – county submittals 1, 5, 6, 7, 8, 9, 10 – though not in the same priority order as with the county listing. Added detail on NCWEDD prioritized projects together with a copy of the Okanogan County Commissioner resolution is provided by the Appendix to this report.

Current Supplemental Initiatives

In addition to the adopted Okanogan County project priorities, the Economic Alliance has two other priorities for which action is currently underway. The first is to facilitate the Okanogan County and Colville Confederated Tribes (CCT) Broadband Action Team. A second initiative now ramping up involves marketing of the county's designated Opportunity Zones.

5-10 YEAR STRATEGIC PLAN

In addition to the already adopted project priorities, the Economic Alliance is pursuing the formulation of this CEDRS to address both short- and longer-term economic development and recovery opportunities over the next 5-10 years. Future year project prioritization may occur in a manner much as is currently the case with County Commission adopted infrastructure and economic development priorities.

This Okanogan County specific process has been conducted to augment and build upon the recently approved 3-county NCW Comprehensive Economic Development Strategy. What follows represents the initial outline of a 5-10 year strategic planning initiative specific to Okanogan County.

Strategic Framework

This strategic plan framework differentiates between:

- **Core Economic Development Priorities** – as the primary focus for the on-going work program of the Economic Alliance in cooperation with local governmental, non-profit and business partners.
- **Supporting Opportunities** – as additional priorities reinforcing economic development opportunity for which the Economic Alliance (EA) plays a support role to initiatives typically led by other public, non-profit and business organizations serving Okanogan County.

Both the core and supporting priorities have been identified through a community and organizational outreach process conducted over the Spring of 2021 – including a combination of Community Profile Survey and personal interview discussions. While earlier portions of this report have identified sub-county regions and communities, this strategic economic development and recovery plan also encompasses a county-wide perspective – as may be applicable or adapted in varied ways to the needs, opportunities and interests of individual communities.

Also anticipated is that this strategic planning process reflects a dynamic rather than static one-time strategic planning process. Over this 5-10 year planning horizon, core and supporting priorities may be refined or changed in response to emerging needs and opportunities. Review and refinement of the overall plan is recommended to occur at least every five years – with specific resulting projects prioritized annually.

With this 2021 CEDRS, core economic development priorities encompass five overall topics – business and industry development, downtown/Main Street revitalization, tourism market recovery, opportunity zone investment, and combined external/internal marketing. Each of these topics together with supporting opportunities are summarized by the chart on the next page – followed by more detailed discussion of each priority topic.

5-10 Year Okanogan County CEDRS Core & Supporting Opportunities

| CEDRS Priority | Objectives | Features | Added Comments |
|--|---|---|--|
| Core Economic Development Priorities | | | |
| Business & Industry Development | Increase employment & incomes for County residents | <ul style="list-style-type: none"> • Small business as primary focus • Ready-to-build sites for larger users | Large site development periodic & opportunity-driven, on-going role for small business assistance |
| Downtown & Main Street Revitalization | Increase business opportunity with added local & visitor draw | <ul style="list-style-type: none"> • Business niches not met by large format stores & e-commerce • Improved core area aesthetic appeal | A priority across most Okanogan County communities, combined with job resources & training |
| Tourism Market Recovery | Reposition tourism w/pandemic recovery for value-added capture | <ul style="list-style-type: none"> • Increased length of stay & per visitor spending (especially for north county) | Hospitality training & improved career options w/tourism jobs |
| Opportunity Zone (OZ) Investment | Encourage development in county OZs with local investment capital | <ul style="list-style-type: none"> • Offers favorable capital gains treatment w/long-term re-investment • May utilize local investor networks | Economic Alliance (EA) partnering with North Star Opportunity Zones |
| External & Internal Marketing | Market business & consumer opportunities locally & regionally, provide economic planning support to local jurisdictions | <ul style="list-style-type: none"> • External marketing for non-local business & investor recruitment • Internal marketing for home-grown opportunity & community support | Use cross-marketing appealing to multiple tourism, residential, business & investor constituencies |
| Supporting Opportunities | | | |
| Affordable Housing | Add inventory, provide affordability | <ul style="list-style-type: none"> • Focus on workforce & senior housing | EA support for provider initiatives |
| Broadband Internet | Achieve full coverage (up to 100%) | <ul style="list-style-type: none"> • Draw on partner sources & initiatives | EA role w/Broadband Action Team |
| Wildfire Risk Management | Reduce wildfire risk & mitigate loss of future events | <ul style="list-style-type: none"> • Multi-faceted approach addressing rural development, forest management & climate change | EA support to efforts for broad consensus-based planning/action |
| Health Care Stabilization | Increase hospital tax base & non-governmental payment sources | <ul style="list-style-type: none"> • Securing large employers providing worker access to healthcare insurance | EA support to large employer recruitment & innovative funding |
| Community Infrastructure | Make infrastructure investments that leverage net new employment | <ul style="list-style-type: none"> • Full awareness & utilization of existing & potential federal/state funding | Continued EA role as information broker & for project advocacy |

Note: This 5-10 year strategic plan is preliminary and subject to periodic, regular updates & refinement by the Economic Alliance (EA).

Core Economic Development Opportunities

As noted and summarized by the chart on the preceding page, core economic development priorities encompass five overall topics – business and industry development, downtown/Main Street revitalization, tourism market recovery, opportunity zone investment, and combined external/internal marketing. Further discussion for each of these core economic development topics is provided, as follows.

Business & Industry Development. Recruiting new industry has traditionally represented a core function of economic development organizations in the Pacific Northwest and nationally. Large-scale industrial development may be important in terms of significant job creation and added tax revenue generation. However, landing a large employer is more challenging in a county with relatively limited and dispersed workforce and an average private firm size of just seven employees, 45% fewer than the statewide average.

Successful business attraction also depends on the availability of *ready-to-build* industrial and commercial sites – with infrastructure either in-place or readily accessible and with no substantial environmental constraints. Recommended is that the Economic Alliance focus on a small number of quality sites in a few communities that are eminently suitable and for which there is demonstrated community support.

For many if not most communities in Okanogan County, the greater source of job creation in the years ahead is likely to come from small business start-ups and relocations – in activities ranging from construction to tech-related entrepreneurs. Communities can be best positioned to accommodate and encourage this organic growth with an array of steps ranging from appropriate home occupation ordinances to identification of vacant sites and/or existing buildings for adaptive reuse of small business spaces – ranging from cooperative commercial kitchens to private business spaces including ownership and multi-tenant rental use options.

Downtown/Main Street Revitalization. Improving downtown is a priority repeatedly expressed by Community Profile Survey respondents across Okanogan County – from the perspectives both of physical/amenity improvements and revitalized retail and dining opportunities. Physical improvements are important to improve the appeal of downtown areas for local residents and tourists.

This is the case both for compact walkable downtowns and for more extensive commercial strip corridors that also sometimes include ag-business and industrial uses. Signage to announce downtown arrival, property maintenance, landscaping and pedestrian amenities to encourage stopping and looking around are all of importance to boosting business vitality.

Retail including dining recovery may prove challenging with the increasing shift to e-commerce and large format retailers – intensified during the COVID pandemic. Small town retail will depend on finding business niches not addressed by the increasingly non-local competition – with a mix of products and services in a walkable setting appealing both to local residents and visitors. Job training and skills upgrading may serve to complement local business initiatives.

An example of a program recently launched is a collaborative initiative with the NCWEDD and Regional Strategies organization – awarding eight NCW communities with CARES Act funding to sponsor an online *Retail Academy* education course – teaching best practices to attract new retail and restaurants while providing resources to support and grow existing local businesses. Of the eight communities, four are in Okanogan County – Brewster, Oroville, Pateros and Twisp.

A final component of downtown revitalization may be to seek opportunities for adding new in-demand uses to the existing retail and service business mix. Based on experience of larger communities regionally and nationally, this may include introduction of downtown area housing as with apartments or townhomes together with live-work and co-working spaces for start-up as well as more established tech-forward businesses. This strategic approach is most pertinent for communities already receiving significant in-migration from the Puget Sound as with tele-workers and home-based businesses.

Tourism Market Recovery. While detailed data is not yet available, anecdotal information indicates that tourism recovered well in the latter part of the 2020 season for the Methow Valley portion of the county. Activity remained more depressed in the North County along the Highway 97 corridor due in large part to closure of the Canadian border crossing at Oroville.

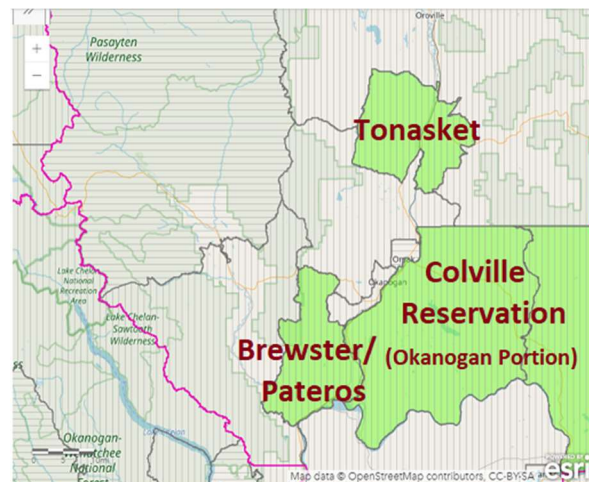
Assuming some form post-pandemic normalization, there may be opportunity for tourism not only to fully recover but to be repositioned for greater value-added market capture. This could involve creating destination and pass-through activities that encourage longer lengths of stay and increased per visitor spending – of special importance for the north county area which has lagged economically in recent years.

To reach beyond recovery toward longer term resilience, additional topics of importance may include hospitality training coupled with more active advancement, pay and housing options for tourism workforce. While coordination of county-wide tourism activities is provided by the Okanogan County Tourism Council, the Economic Alliance provides administrative support for the Tourism Council and as a source for answering questions from visitors and others with tourism-related questions.

Opportunity Zone (OZ) Investment. The federally authorized Opportunity Zone program offers capital gains related tax incentives in selected communities across the NCW region. The North Star Opportunity Zones include OZs in the Brewster/Pateros and Tonasket areas and for the portions of the Colville Reservation in both Okanogan and Ferry Counties – with all of adjoining Ferry County designated for OZ investment.

Investors are able to defer paying taxes on capital gains when invested in Qualified

Okanogan County Opportunity Zones



Opportunity funds that in turn are invested in distressed communities designated as Opportunity Zones.

The approach being taken to OZ development in Okanogan County as well as elsewhere in the NCW region is to emphasize local investor networks generating capital and return opportunities from within region. Affordable housing is an anticipated priority for several OZs with industrial development potential dependent on suitable site areas including the portion of Omak overlapping with the CCT.

An added advantage of this program is to link up with use of local investor networks as have been already formed for the Methow Valley (through TwispWorks) and more recently in Pateros. These offer opportunity for locally funded and initiated development – whether OZ related or otherwise.

External & Internal Marketing. Largely missing from the economic development approach that has been taken locally is more aggressive marketing of priority opportunities – both externally to business and investors from outside the region and internally to existing businesses as well as to communities that may benefit from added job creating investment:

- **External marketing** can be considered as a form of business-to-business (B2B) contacts – often thought of as a private business selling goods or services to another business. However, similar marketing principles can be applied in a local community or county marketing its advantages as a place to locate or grow business for which Okanogan region offers a distinct competitive advantage.
- **Internal marketing** involves a variety of outreach initiatives to the immediate community – including start-up local businesses or those seeking to expand, potential local investors, customers of area businesses, and the public in discussion of major project opportunities. Internal marketing also involves intergovernmental (including tribal) coordination and consideration of potential joint projects. This may occur together with assistance as provided by the Economic Alliance in pursuing business or other economic development grant and technical assistance funding opportunities.

There may be new opportunities to cross-market tourism, residential and work opportunity, achieving multiple results as a return on the up-front marketing investment. This has been a strategy used, for example, by Central Oregon communities. This is exemplified by the current slogan for La Pine, Oregon: “The outdoors at your front door” – an appeal of interest to current and prospective residents, visitors and businesses.

Supporting Opportunities

Supporting opportunities most frequently identified relate to housing affordability, broadband internet, wildfire risk management, health care stabilization and community infrastructure. Proactive investments and programs in each of these arenas will be needed and can reinforce the potential for successful implementation of core economic development opportunities. Each of these supporting opportunities is considered, in turn.

Affordable Housing. Lack of an adequate supply of housing and diminished affordability is widely cited as an issue (and often the #1 issue) affecting not just livability of Okanogan communities but also economic vitality. Without affordable housing, it becomes increasingly difficult to maintain economic vitality for employment sectors ranging from agriculture to tourism to attracting and retaining public service workers.

The pandemic accelerated the arrival of urban refugees as telecommuters, second homeowners and occupants of vacation rentals. While some of the immediate inflow pressure may be lessened as more office workers are asked to return to urban business locales, the interest in permanent and seasonal housing occupancy is expected to remain strong even in a more normalized post-pandemic environment.

Needs identified by area stakeholders include more workforce housing (ranging from farm to hospitality to education workers), senior and special needs housing, and mid-market housing for others being priced out by urban refugees moving to the Okanogan region. While the local market has been historically oriented primarily to single family housing, this may shift in the years ahead with need for more affordable and innovative housing types – including duplex/townhome, apartment and modular housing – especially in proximity to existing downtown or high amenity (as with riverfront) locations.

Diversity in housing providers may also be expected – ranging from traditional developers/contractors to non-profit entities as through public housing authority and community land trust initiatives (as in the Methow Valley). Innovative partnerships involving multiple small business owners with employer sponsored housing might also be pursued.

While the Economic Alliance is not expected to be the lead player in most housing initiatives, the ability to produce more quality dwelling units at rates affordable to workforce will assure improved outcomes for those investing in retail, service and industrial businesses. The ability to scale up housing development may also enhance opportunities to attract larger employers. The Economic Alliance can support efforts of other public and market participants as with convening of housing industry players and identification of relevant funding sources.

Broadband Internet. Limitations associated with inadequate rural area broadband became very apparent during the pandemic – with more people working from home, often in remote locations. Limited rural broadband capability has also proven problematic to inform residents during wildfire periods, with at-home schooling during the pandemic and for more active moves toward telemedicine.

Different approaches have been considered for implementation of improved broadband services – with major initiatives in the Methow Valley and for the Colville Confederated Tribes, also with a county-wide broadband study conducted in 2020. The Economic Alliance has played a key support and convening role by facilitating the Okanogan County and Colville Confederated Tribes (CCT) Broadband Action Team. The long-term goal is to achieve 100% broad-band coverage (as nearly as possible).

Wildfire Risk Management. Okanogan County and the greater NCW region have experienced pronounced economic and ecological loss due to large-scale wildfires (and subsequent mudslides) in 2013, 2014, 2015, 2016 and again in 2020. The Carlton Complex fire in 2014 is the largest single fire in Washington state history, destroying over 350 homes in and near Pateros and Brewster, causing nearly \$100 million in economic damages.

While substantial recovery has occurred, large areas of Okanogan County remain vulnerable to future events for reasons potentially associated with such factors as rural area development, forest management, and broader climate change. A major challenge going forward is to strive for greater consensus as to appropriate measures for mitigation, protection and recovery. While lead roles will be taken by federal, state and local agencies, the Economic Alliance may have opportunity to serve in the capacity of convenor, involving consideration of local business and community perspectives.

Health Care Stabilization. Health care facilities for Okanogan County are currently centered in Omak, Brewster and Tonasket – along or near the Highway 97 corridor. As with other rural hospitals and care providers nationally, a major challenge to ongoing financial sustainability is the over-reliance on Medicare and Medicaid reimbursements at lower rates than provided by private health insurers.

Maintaining a wide range of emergency and routine medical service capabilities is important to community sustainability – especially for seniors, minority and other underserved residents. For a tax base supported hospital such as Omak’s Mid-Valley Hospital, attraction of larger private employers would provide greater financial stability both in the form of healthcare insurance and added business-generated property tax base. There may also be options for innovative services to be offered by area providers that might draw in outside customers for certain specialties – in addition to meeting local needs.

Community Infrastructure. The Okanogan County Commissioners and Economic Alliance take an active role with annual prioritization of public infrastructure projects for inclusion with the subsequent 3-county NCWEDD regional prioritization process. Details of recent priority submittals for Okanogan County are as described by the Appendix to this CEDRS report.

To date, adopted federal stimulus funding has come from the March 2020 **CARES Act** and the **American Rescue Plan Act** (or COVID-19 Stimulus Package signed into law on March 11, 2021). These programs have included funding both for capital projects and other forms of direct business, employment and related economic development assistance.

As currently proposed (as of June 2021), two forms of added federal funding allocations are being considered by Congress and the Administration – with the prospect of further allocations for community infrastructure in support of additional local funding initiatives, The **American Jobs Plan** is proposed to improve traditional physical infrastructure – including for highways, bridges, airports, drinking water, electric grid, high-speed broadband, building modernization and redevelopment, research and development (as for clean energy and semiconductor technology), and home/community-based care for seniors and people with disabilities. As

separate legislation, an **American Families Plan** is proposed to support human infrastructure in areas related to childcare, paid leave, pre-kindergarten, community college, and healthcare.

In conjunction with or in addition to these federal programs, the state of Washington is providing funding support for community infrastructure through a combination of existing and new programs. The Economic Alliance currently provides resources directly to businesses, employers and local jurisdictions including programs related to:

- Management of state Department of Commerce funding for the Okanogan County Small Business Support Initiative for new businesses that have been adversely affected by the COVID-19 public health pandemic.
- Business resources including direct access to certified business advisors with the Small Business Development Center including linkage to data and business services locally and statewide.
- Education and training linkages to local school districts, the Wenatchee Valley College at Omak and WorkSource employment, and StartUp NCW (for startup communities and entrepreneurs).
- Information for available commercial/industrial properties.
- Okanogan County Infrastructure and economic development prioritization application.
- Access to other current and potential funding initiatives in cooperation with NCWEDD.

Looking forward, there is the prospect for additional federal and state funding to support a range of community infrastructure needs – potentially including human as well as physical infrastructure projects. An important purpose of this CEDRS is to articulate economic development needs and opportunities so that Okanogan County is positioned as best possible for funding resources as they become available. An added priority for some communities is more recreation-related facilities for youth activities – serving both residents and visitors.

Depending on the funding source and sponsor eligibility requirements with varied programs, the Economic Alliance may play a lead or support role in providing information and/or advocating for community infrastructure funding.

Summary Strategic Plan Notes

As noted at the outset of this strategic plan discussion, this CEDRS is intended as starting point for economic development and recovery. This initial strategy is subject to change over time as future conditions warrant. Over a 5-10 year CEDRS planning horizon, core and supporting priorities may be refined or changed in response to emerging needs and opportunities.

Review and refinement of the plan is recommended to occur at least every five years – with specific resulting projects prioritized annually as currently occurs with county-adopted project priorities. This brings the CEDRS to the last section of Evaluation Framework – which now follows.

VI. EVALUATION FRAMEWORK

The evaluation portion of the CEDRS process is intended to cover two questions that will be addressed as implementation occurs, notably: “*How are we doing?*” and “*What can we do better?*”

This first question is best answered if clear performance measures are put in place in advance of project implementation – consistent with what Okanogan County and NCWEDD view as key indicators of success. The second question can be addressed through future year monitoring and update of this 2021 CEDRS report.

PERFORMANCE MEASURES

Measures of project performance involve quantification when possible as well as project-specific qualitative considerations. The metrics applied should rely on data or other information that is readily obtainable – whether by the Economic Alliance or individual project sponsors. Planned in conjunctions with this CEDRS process are three types of performance measures:

- Annually updated metrics for Okanogan County
- Periodically updated community or sub-county regional profiles
- Evaluation specific to the purposes of each individual CEDRS project or program implemented

The first and third sets of performance metrics are consistent with what has been outlined with the NCWEDD comprehensive economic development strategy. The second item is suggested for additional consideration by the Economic Alliance.

Overall Okanogan County Region Metrics. Independent of the timing of future CEDRS updates, it is proposed that the Economic Alliance in cooperation with NCWEDD compile consistent annual updates for the following key data points. These metrics serve as indicators of overall countywide economic performance relative to the 3-county NCWEDD region and state of Washington (with potential sources of data also noted):

- Population (WA-OFM)
- Covered NCW employment and average wage (WA-ESD)
- Unemployment rate (WA-ESD)
- Median household income (HUD or proprietary source)

Preferred are data sets that reflect current rather than dated material. In addition to basic economic indicators as noted above, future CEDRS updates might include data sets related to key current year strategic project priorities, as for tourism or retail/restaurant recruitment, or percentage of homes/businesses with high-speed internet access, or for housing affordability.

Tracking these or other metrics may become more readily achievable with roll-out of regularly updated county-specific Recovery Dashboards.

Periodically Updated Community or Sub-County Regional Profiles. Due to the diversity of communities across Okanogan County, this CEDRS has included brief two-page profiles for each of five sub-county regions. On an initial trial basis, this added information has proved useful in the subsequent SWOT evaluation and recommended action plan.

In cooperation with NCWEDD, it is anticipated that additional profiles will be prepared for a selected set of incorporated communities throughout the NCW region – essentially a variation on the sub-county profiles provided with this report. For the future, it is suggested that consideration be given to periodic updating of community or sub-region profiles – including determination of data most readily available and useful for on-going review.

Evaluation Specific to Project Purposes. CEDRS supported project initiatives serve a variety of purposes. For example, one project may be aimed to primarily address objectives of improved equity for NCW businesses and employees. Another may be focused more on economic recovery or resiliency.

Consequently, it makes sense to evaluate varied projects in accordance with the purposes or objectives considered. This will involve the use of quantitative (measurable) outcomes and/or qualitative (or more subjective) evaluations, especially for projects where the numbers alone do not tell the whole story:

- Quantitative metrics should cover pertinent data points for which information can be readily obtained as agreed with project sponsors (e.g., # of new restaurants or added sales for area restaurants)
- Qualitative benefits not as easily measurable (e.g., community health benefits for underserved populations as may be provided by a wellness center)

As part of the project planning process, the Economic Alliance and project participants may establish up-front performance measures viewed as mutually useful to assess subsequent project performance. For infrastructure projects as prioritized by the Board of Commissioners, the current process warrants continuation in its current form. For economic development project prioritization, it is recommended that greater focus be placed on key economic outcomes, such as businesses or jobs created and incomes of those benefitted. This may also better position local priorities for federal and state economic development-related funding.

CEDRS REVIEW & UPDATING

This CEDRS has been completed as a one-time initiative with sponsorship of the Washington State Department of Commerce. While there is no commitment to future updating, recommended is consideration to proceed with periodic updates – at least every 5 years.

APPENDIX. PRIORITY PROJECT LISTINGS

This appendix provides a summary of recent regional and county-wide project listings.

2021-26 NCWEDD Priorities

As a federally designated Economic Development District (EDD) with funding from the U.S. Economic Development Administration (EDA), the North Central Washington Economic Development District (NCWEDD) annually submits a listing of priority infrastructure projects for potential funding support covering Okanogan, Douglas and Chelan counties. With its most recent 2021-26 submittal, NCWEDD has identified and prioritized priority projects for the three-county region. With its upcoming next year 2022 submittal, NCWEDD has indicated it will be adding another five projects to address key equity objectives for economic development.

Of the 10 NCWEDD projects currently submitted, seven have been identified as resulting from the 2021 Okanogan County Community, Economic Development and Public Infrastructure Prioritization Process. These are listed as NCWEDD priorities 1 and 5-10, briefly described as follows:

- 1. Brewster Broadband Initiative** – The City plans on building out the infrastructure required to make broadband internet access available and affordable to every business, residence and industry within the city limits. This project has an estimated cost of \$2,000,000.
- 5. Tonasket South End Annexation** – Tonasket is seeking \$100,000 for Phase One of a project to extend city utilities and upgrade transportation facilities in an area proposed for annexation. This phase is the completion of the planning, engineering, cultural and environmental review and permitting requested for construction.
- 6. Old 97 Hospital Way Street Improvements** – This project will complete the reconstruction of Old 97 (primary alternate to US 97) from US 97 to the city limits and include improvements to the intersection with Hospital Way. This project will include provisions for safe pedestrian access and eliminate existing safety concerns.
- 7. Chief Tonasket Park South End Access** – Since the early 1990's the City has had the goal of developing a second point of access to Chief Tonasket Park as a means to address the public health and safety concerns raised by the single access through an active fruit warehousing/shipping complex. The planned project is intended to move the project forward through preparation of preliminary design options which are needed to finalize agreements with Okanogan County and a private landowner regarding the right-of-way required to construct the access, delineation of wetlands adjoining existing crossing and approaches; preparation of cost estimates for selected design option.

- 8. US 97 and Shumway Road** – Completion of the east leg of the intersection of US 97 and Shumway Road has been in Omak’s Comprehensive Planning documents since the early 1990’s. The project gathered some steam in the late 1990’s and early 2000’s when the property owner commissioned the design and worked with the City to obtain permission from the WSDOT for construction of the access on the east side of US 97. While the project received approval from WSDOT, the effort to construct the access and roadway to connect to either Sandflat or Engh Road stalled for several reasons. Over the past year, the effort to construct the east leg began to gain steam as the Omak School District acquired 120 acres just east of Sandflat Road, and the owner of the property adjoining US 97 had a potential purchaser. The City has also received grant funds to improve the capacity and WSDOT just completed a traffic study done by Perteet Engineering.

- 9. Tonasket Public Library** – Tonasket’s Library, constructed in 1982, has outgrown its 1,597 square foot facility. The planned project is the first phase of the effort to replace and/or relocate this important community asset. The \$60,000 project entails securing qualified consultant services to complete three important tasks in concert with the community: 1) determining space needs for library collections, programming and activities, 2) evaluating and prioritizing possible locations; and 3) preparing conceptual designs and estimated costs for a replacement facility.

- 10. Omak Municipal Airport Water** – The project would be the second phase of the 2019 granted fund for the water distribution system by adding a reservoir and additional water main to the north of the airport.

Prior Okanogan County Project Priorities

On the following pages are provided priority infrastructure and community/economic development projects for Okanogan County as:

- Adopted by the Okanogan Board of Commissioners as 2021 priorities (with Resolution 161-2020) as recommendations for inclusion with the recently adopted 2021 NCWEDD CEDRS (7 of 10 Okanogan County infrastructure projects were included as top 10 priorities with the 2021 three-county NCW priority listing).
- As adopted the prior year in 2020 by the Okanogan County Board of Commissioners (with Resolution 131-2018) for further ranking as occurred with the NCW Economic Development District.

OKANOGAN COUNTY COMMISSIONERS'

RESOLUTION 161 - 2020

A resolution endorsing Okanogan County Public Infrastructure Projects Prioritization list and Okanogan County Community/Economic Development Projects Prioritization list for ranking at the regional level by the NCW Economic Development District

WHEREAS, the Board of Okanogan County Commissioners' (BOCC) recognizes the importance of promoting projects which enhance the economic health of Okanogan County and its residents; and,

WHEREAS, the Economic Alliance Infrastructure Committee met on November 12, 2020 to prioritize Infrastructure applications for 2021 County Wide Projects. The applications went through a process with the Infrastructure Committee to identify priority projects that County .09 funding could be used for if there were funding available for award to projects: and

WHEREAS, the Economic Alliance Director met with the Commissioners on November 17, 2020 and presented both an Okanogan County Public Infrastructure Project Prioritization list and an Okanogan County Community/Economic Development Project Prioritization list as recommended by the Infrastructure Committee, which will be ranked further by NCW Economic Development District at the regional level; and

WHEREAS, the BOCC supports the Economic Alliance's role in facilitating the prioritization process for potential funding for projects;

NOW, THEREFORE BE IT RESOLVED, that the Board of Okanogan County Commissioners hereby accepts and endorses said lists as prioritized.

2021 Okanogan County Public Infrastructure Project Prioritization List

- 1. Omak Municipal Airport Development
2. Pateros Mall Renovations
3. Tonasket Perfect Passage
4. Pateros Starr Road Development
5. Omak Shumway US 97 Development
6. Brewster Broadband Initiative
7. Tonasket South Annexation
8. Chief Tonasket Park South Access
9. Tonasket Public Library
10. Old 97 Hospital Way Street Redevelopment

2021 Okanogan County Community/Economic Development Project Prioritization List

- 1. Pateros/Brewster Community Resource Center Building Purchase
2. Pateros/Brewster Community Resource Center South County Community Kitchen
3. Tonasket Art Project

DATED at Okanogan, Washington this 1st day of December 2020.

BOARD OF COUNTY COMMISSIONERS
OKANOGAN, WASHINGTON



ATTEST:

Laleña Johns, CMC
Clerk of the Board

Signatures of Jim DeTro (Chairman), Chris Branch (Member), and Andy Hover (Member) with their respective titles.

OKANOGAN COUNTY COMMISSIONERS'

RESOLUTION 131 - 2018

A resolution endorsing Okanogan County Public Infrastructure Projects Prioritization list and Okanogan County Community/Economic Development Projects Prioritization list for ranking at the regional level by the NCW Economic Development District

WHEREAS, the Board of Okanogan County Commissioners' (BOCC) recognize the importance of promoting projects which enhance the economic health of Okanogan County and its residents; and,

WHEREAS, the Economic Alliance Infrastructure Committee met to prioritize the Cities Infrastructure applications for 2020 County Wide Projects. The applications went through a process with the Infrastructure Committee to identify priority projects that County .09 funding could be used for if there were funding available for award to projects; and

WHEREAS, the Economic Alliance Director met with the Commissioners on September 30, 2019 and presented both an Okanogan County Public Infrastructure Project Prioritization list and an Okanogan County Community/Economic Development Project Prioritization list as recommended by the Infrastructure Committee which will be ranked further by NCW Economic Development District at the regional level; and

WHEREAS, the BOCC supports the Economic Alliance's role in facilitating the prioritization process for potential funding for projects; and,

NOW, THEREFORE BE IT RESOLVED, that the Board of Okanogan County Commissioners hereby accepts and endorses said lists as prioritized.

2020 Okanogan County Public Infrastructure Project Prioritization List

1. Omak Airport Water Phase 2
2. Tonasket Perfect Passage
3. Omak Shumway Development
4. Winthrop Town Trailhead
5. Tonasket Annexation Phase 1
6. Tonasket Public Safety Building
7. Tonasket Public Library
8. Brewster Old 97 Hospital Way Improvements


2020 Okanogan County Community/Economic Development Project Prioritization List

1. OCCA Homestead Resource Training Center
2. OCFD 6 Emergency Message Board
3. Loomis Fire Joint Base
4. OCFD 6 Fire Safety Training
5. MVH New Regional Hospital
6. OCFD 6 Fluorescent Light Replacement
7. OCWC Wellness and Birthing Center

DATED at Okanogan, Washington this 15th day of October 2019.

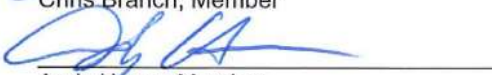
**BOARD OF COUNTY COMMISSIONERS
OKANOGAN, WASHINGTON**

ATTEST:


Laleña Johns, CMC
Clerk of the Board


Jim DeTro, Chairman


Chris Branch, Member


Andy Hover, Member

END NOTES

- ¹ The Board of Directors of the Economic Alliance is comprised with representation as follows:
- 2 from each of the five areas of the county
 - 1 from the Colville Confederated Tribes
 - 1 from the Colville Tribe Federal Corporation
 - 2 from the Okanogan County Commissioners
 - 2 city representatives
 - 1 representative each from the financial industry, tourism industry, arts community
 - 4 at large members
- Standing committees include the Finance, Communications, Infrastructure and Business Education Committees. A Broadband Action Team serves as an Ad Hoc Committee.
- ² The February 1992 *Economic Diversification Strategy for Okanogan County* was prepared for the Okanogan County Council for Economic Development (OCCED) with funding from the then Washington Department of Community Development by the economic and development consulting firm E. D. Hovee & Company, LLC.
- ³ Quotation is from the *Okanogan County Economic Development Process* as prepared by the Economic Alliance, updated June 19, 2018.
- ⁴ Population estimates for 2020 are those of the Washington State Office of Financial Management (OFM). These estimates are subject to potential revision once results of the 2020 U.S. Census become available.
- ⁵ The Okanogan County Economic Alliance contracted with the same firm (eImpact) as NCWEDD for the 3-county region but with the Economic Alliance goal to create a county-specific economic dashboard. This has occurred as a partnership between the University of Washington, Okanogan Public Health District, Okanogan Coalition for Health Improvement (CHI) and the Economic Alliance.
- ⁶ While Chelan County experiences the highest per capita tourism spending of the three NCW counties, Douglas County received the strongest percentage growth from 2015-19.
- ⁷ The U.S. Census Bureau identifies nine Census County Divisions (CCDs) for Okanogan County, some of which are relatively small in population or geographic area. For purposes of this CEDRS report, these nine CCDs have been combined into five distinct sub-county regions, as follows:
- The Central subregion is comprised of the Conconully-Riverside, Okanogan and Omak CCDs.
 - The East/Central region is denoted by the U.S. Census as the Colville Reservation CCD.
 - The Methow Valley region comprises the Methow Valley and the lightly populated Early Winters CCDs.
 - The North County region comprises the Oroville and Tonasket CCDs.
 - The South County sub-county region is denoted by the U.S. Census as the Brewster-Wakefield CCD.
- ⁸ SWOT elements are consistent with definitions provided by the U.S. Economic Development Administration (EDA) for comprehensive economic development strategies.



retail academy

RETAIL RECRUITMENT PLAN

Pateros, Washington



retail strategies .com

info@retailstrategies.com
(205) 314-0386

2200 Magnolia Ave, Suite 100
Birmingham, AL



DISCOVER

Research

Memberships, Subscriptions & Customized Reports

Research Partners & Geographic Information Systems

Crittenden Research

RLT
RETAIL LEASE TRAC



NATION'S
Restaurant News

PlainVanillaShell

SN
SUPERMARKET NEWS

TETRAD

Sitewise

STDB

REGIS
online



DISCOVER

Research

where does all this information come from?

here are a few of the demographic data sources used





DISCOVER

Research

You have at your disposal thousands of variables from population and household incomes to spending patterns by retail category.

The information covered in this document represents the key highlights for your community. Retail Strategies has provided Alexandria's primary point of contact an electronic copy of each of these reports from multiple geographic parameters.

The following are the highlights from a data and analytic perspective.

Demographic
Overview

Mobile Data
Collections

Customized Trade
Area Analysis

Lifestyle
Segmentation

Retail
Gap Analysis

Peer
Analysis



RESEARCH

Discover

Residential Population Density

• 1 dot = 100

Daytime Employee Population Density

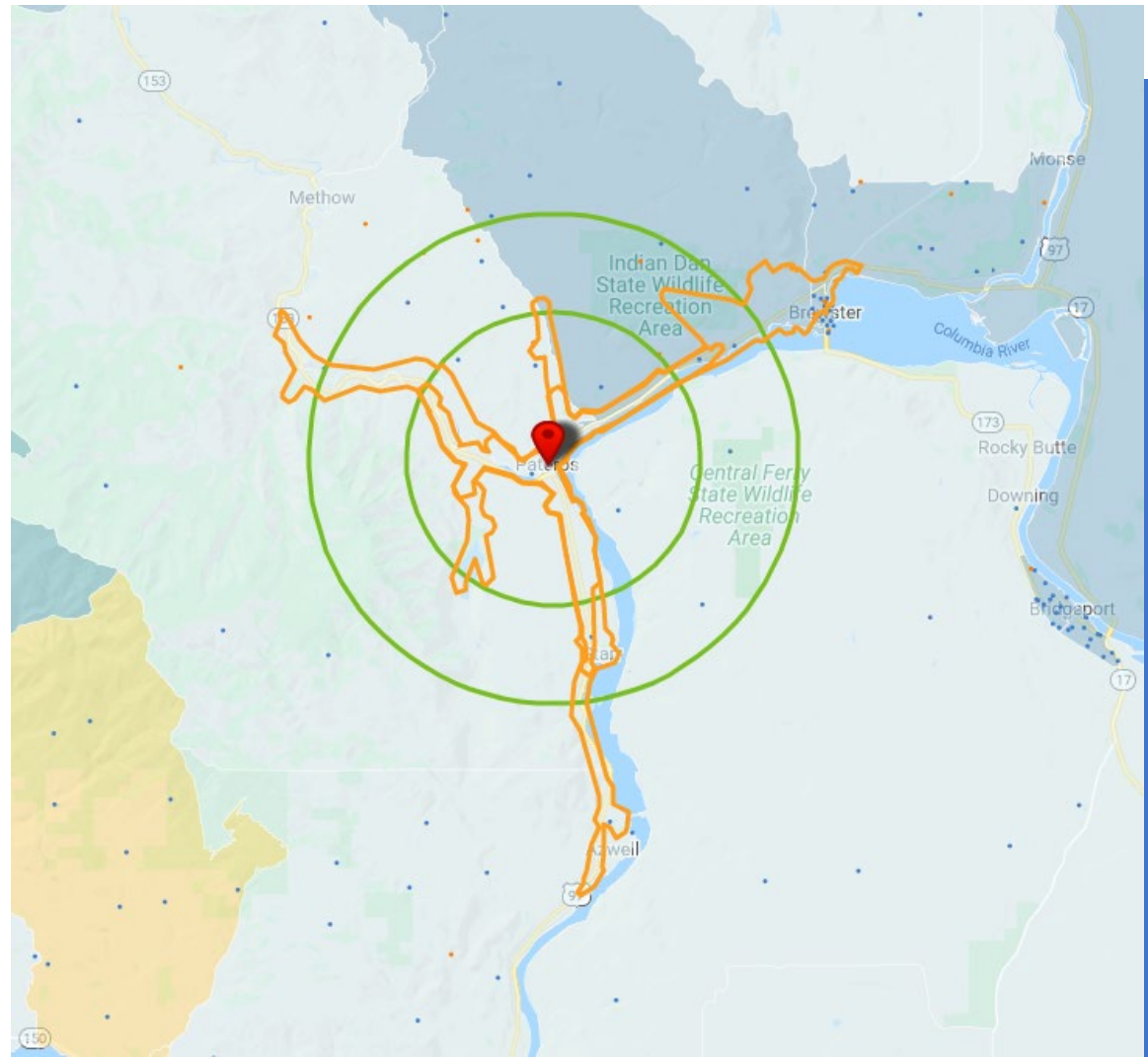
• 1 dot = 100

Median Household Income

- \$0-\$25,000
- \$25,000-\$50,000
- \$50,000-\$75,000
- \$75,000-\$100,000
- \$100,000-\$150,000
- > \$150,000

Study Area

- 3.00 mi
- 5.00 mi
- 0-5 min
- 0-10 min





DISCOVER

Mile Radius & Drive Time Demographics

| Category | 3-Mile Radius | 5-Mile Radius | 10-Mile Radius | 5-Minute Drive Time | 10-Minute Drive Time | 15-Minute Drive Time |
|-----------------------------------|---------------|---------------|----------------|---------------------|----------------------|----------------------|
| Current Year Estimated Population | 1,029 | 1,350 | 6,333 | 855 | 2,350 | 4,377 |
| Number of Households | 372 | 486 | 2,068 | 293 | 773 | 1,390 |
| Projected Annual Growth (5 YR) | 3.18% | 2.92% | 2.09% | 3.15% | 1.88% | 1.67% |
| Median HH Income 2020 | \$55,270 | \$53,898 | \$50,320 | \$54,987 | \$49,990 | \$49,475 |
| Current Year Average Age | 41.9 | 41.4 | 38.6 | 41.4 | 38.6 | 37.5 |
| Average Home Value | \$361,122 | \$391,673 | \$377,411 | \$357,474 | \$408,965 | \$373,499 |
| Current Year % Bachelor's Degree | 14% | 13% | 10% | 14% | 12% | 11% |
| Daytime Population | 1,286 | 1,555 | 5,754 | 849 | 3,272 | 4,485 |
| Labor Force | 843 | 1,103 | 5,037 | 697 | 1,865 | 3,429 |



DISCOVER: Custom Trade Area

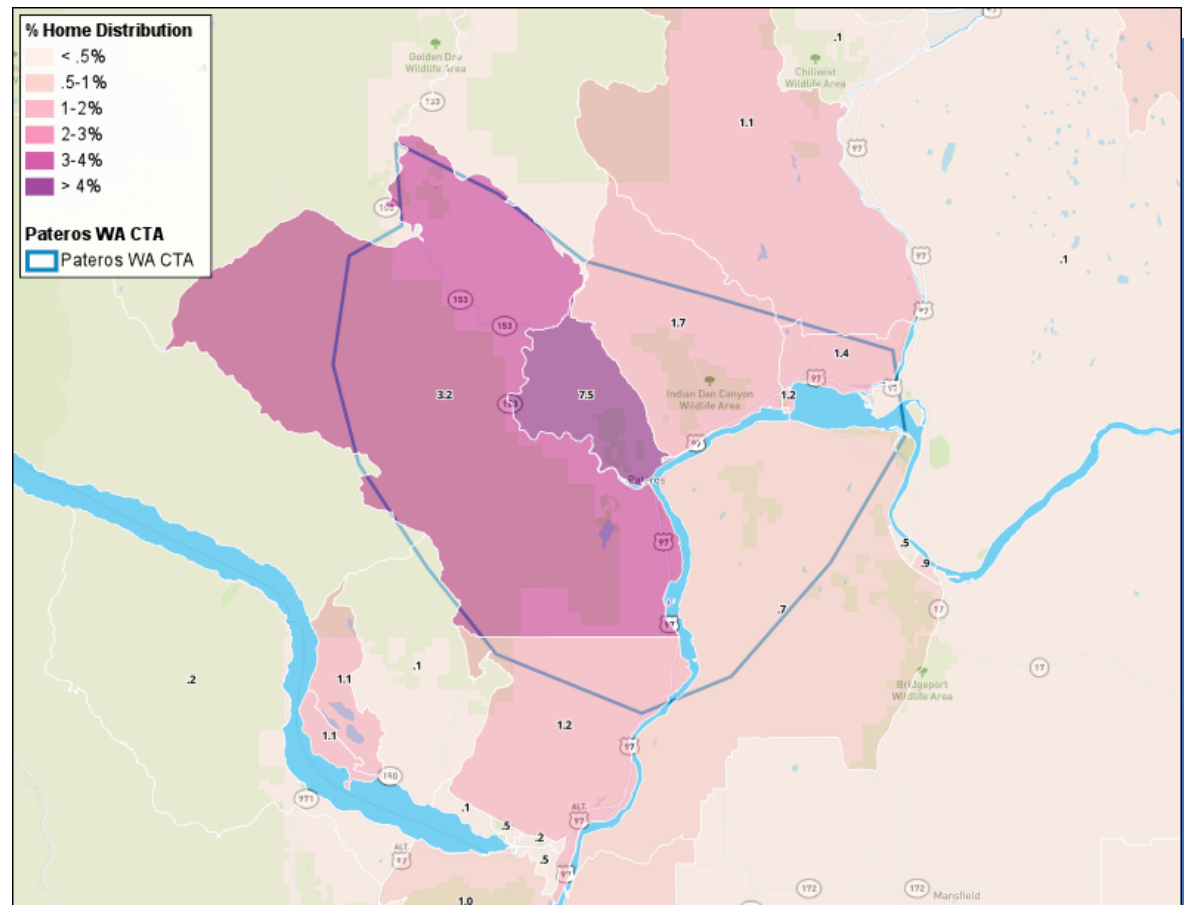
MOBILE DATA COLLECTION

The Service uses data collected from mobile phone users who have agreed within their apps and phone settings to enable location information. The Service includes mobile phone data with latitude/longitude points that are accurate to approximately 20 feet. Data inputs are updated as quickly as every 24-hours. The data shown includes shopper who visited the defined location during the designated time period.



The location tracked was
Sweet River Bakery

for the time period of
March 2020 - March 2021



This tool is intended to support the trade area but does not solely define the trade area.



DISCOVER

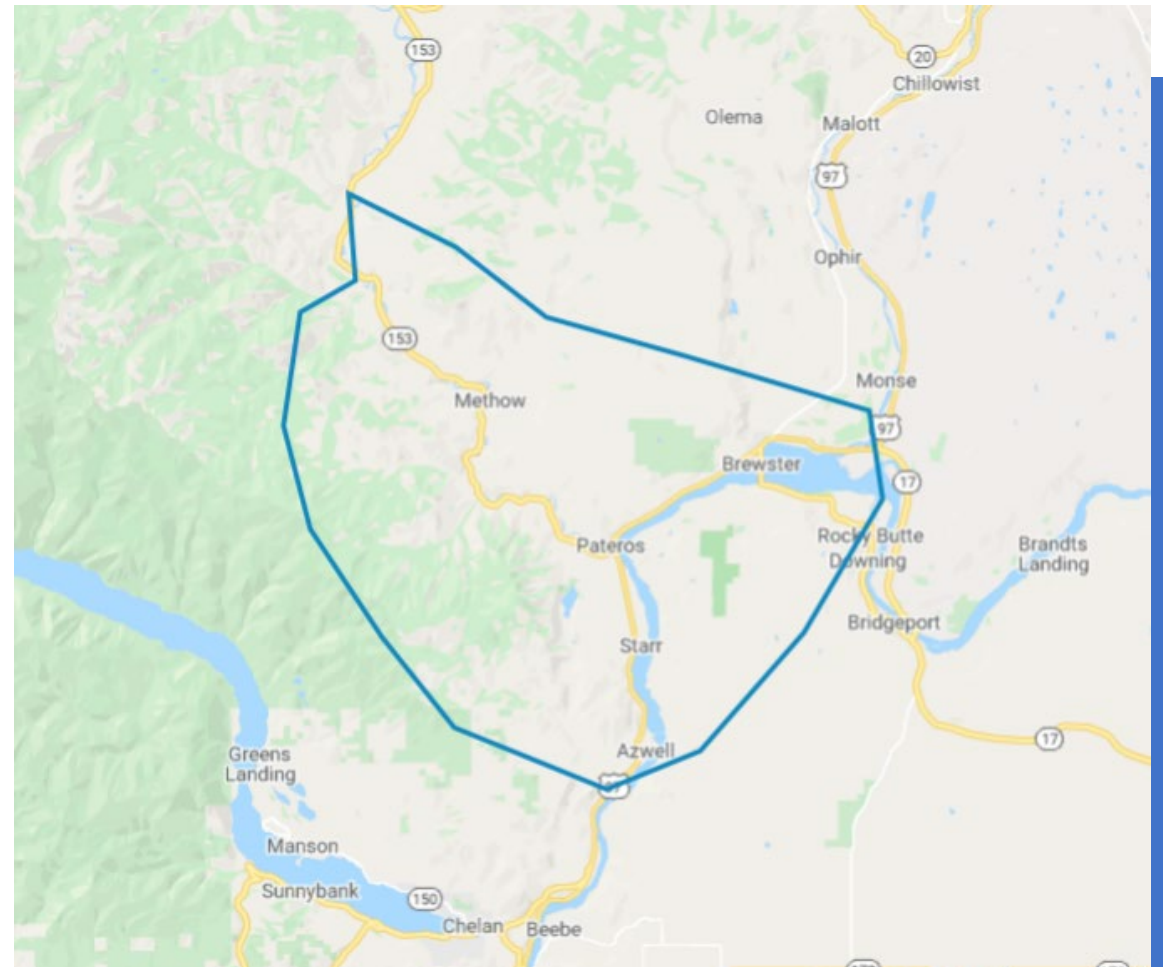
Custom Trade Area

Each retailer has a specific set of site selection criteria they use to determine if they will have a profitable store. Municipal boundaries, radius rings and drive times area is a start.

A customized trade area is the next step to analyzing a market. A trade area defines a core customer base of consumers highly likely to shop and eat in the market at least once a month.

Your trade area has been created by combining a series of drive times, mobile data analysis, geographic boundaries and proximity to neighboring shopping destinations.

Each retailer will analyze their own trade area based on their existing stores, their competition and site selection criteria.





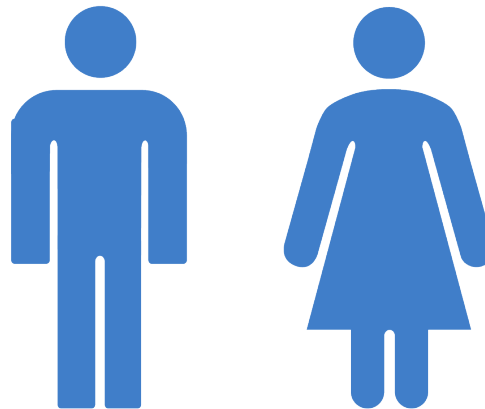
DISCOVER

Custom Trade Area

5,949

2020 estimated population

6,068
projected 2024 population



2.0%
projected growth rate
2020-2025

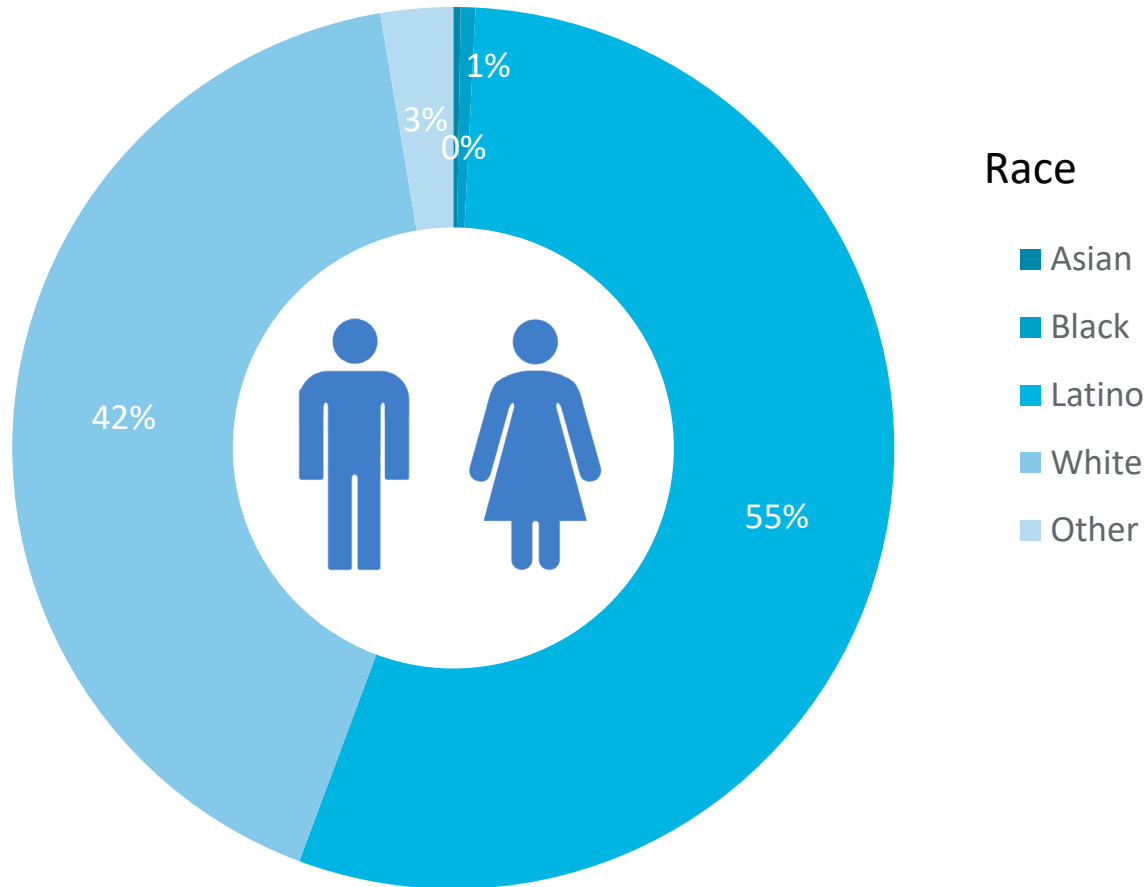
38
male average age

40
female average age



DISCOVER: Custom Trade Area

Our Research





DISCOVER: Custom Trade Area

Our Research

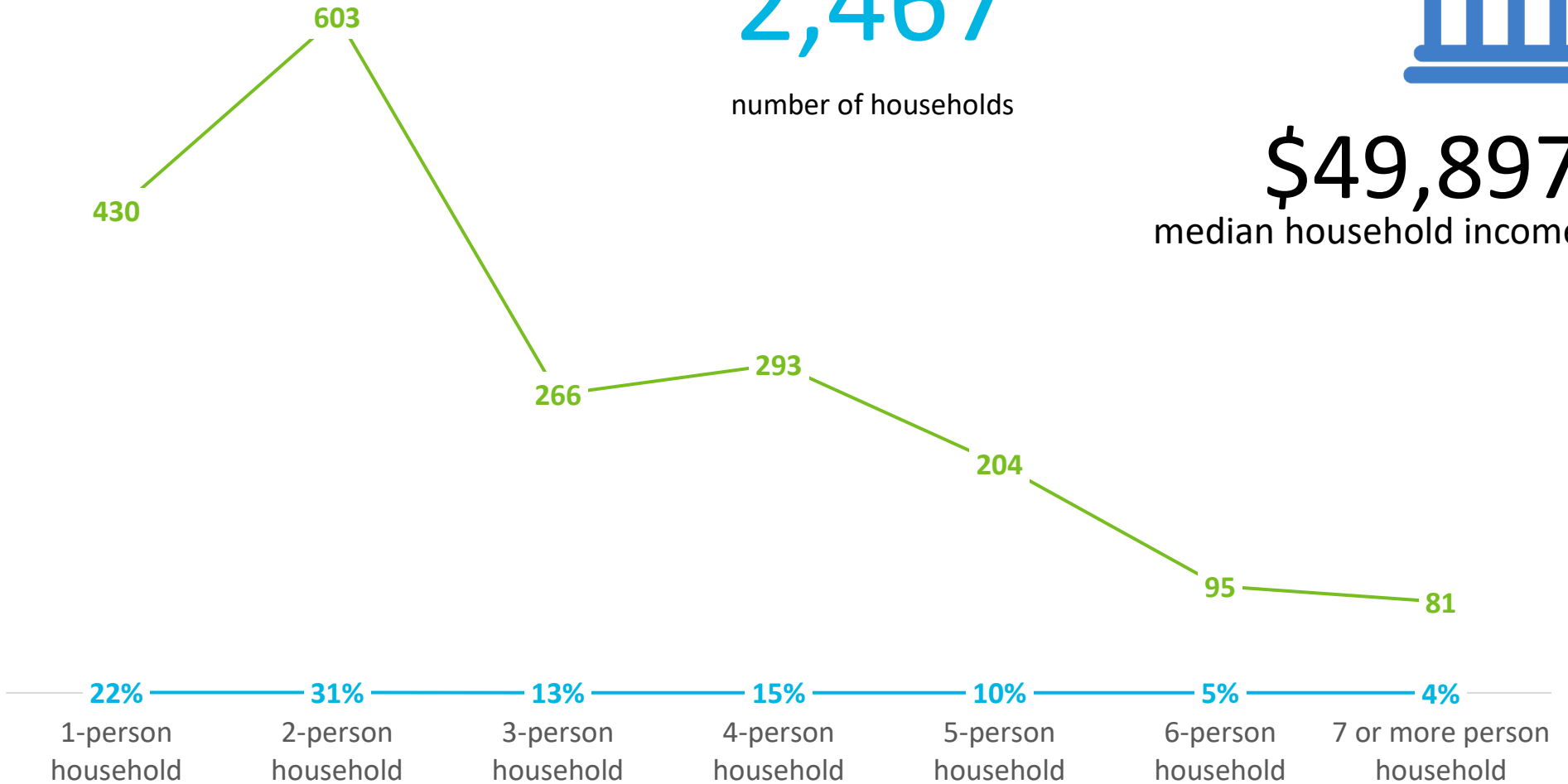


2,467

number of households

\$49,897

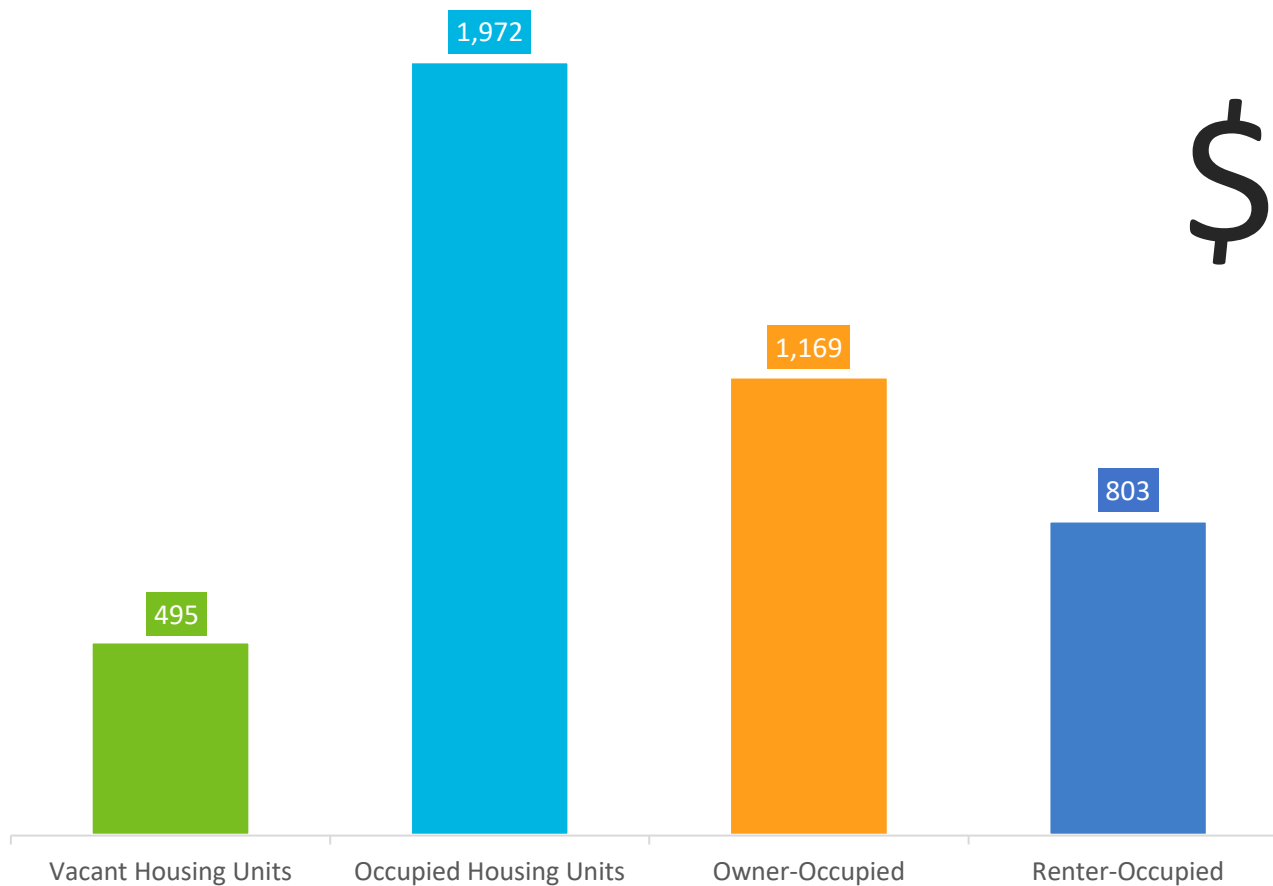
median household income



DISCOVER: Custom Trade Area

Our Research

2020 ESTIMATED HOUSING UNITS BY TENURE

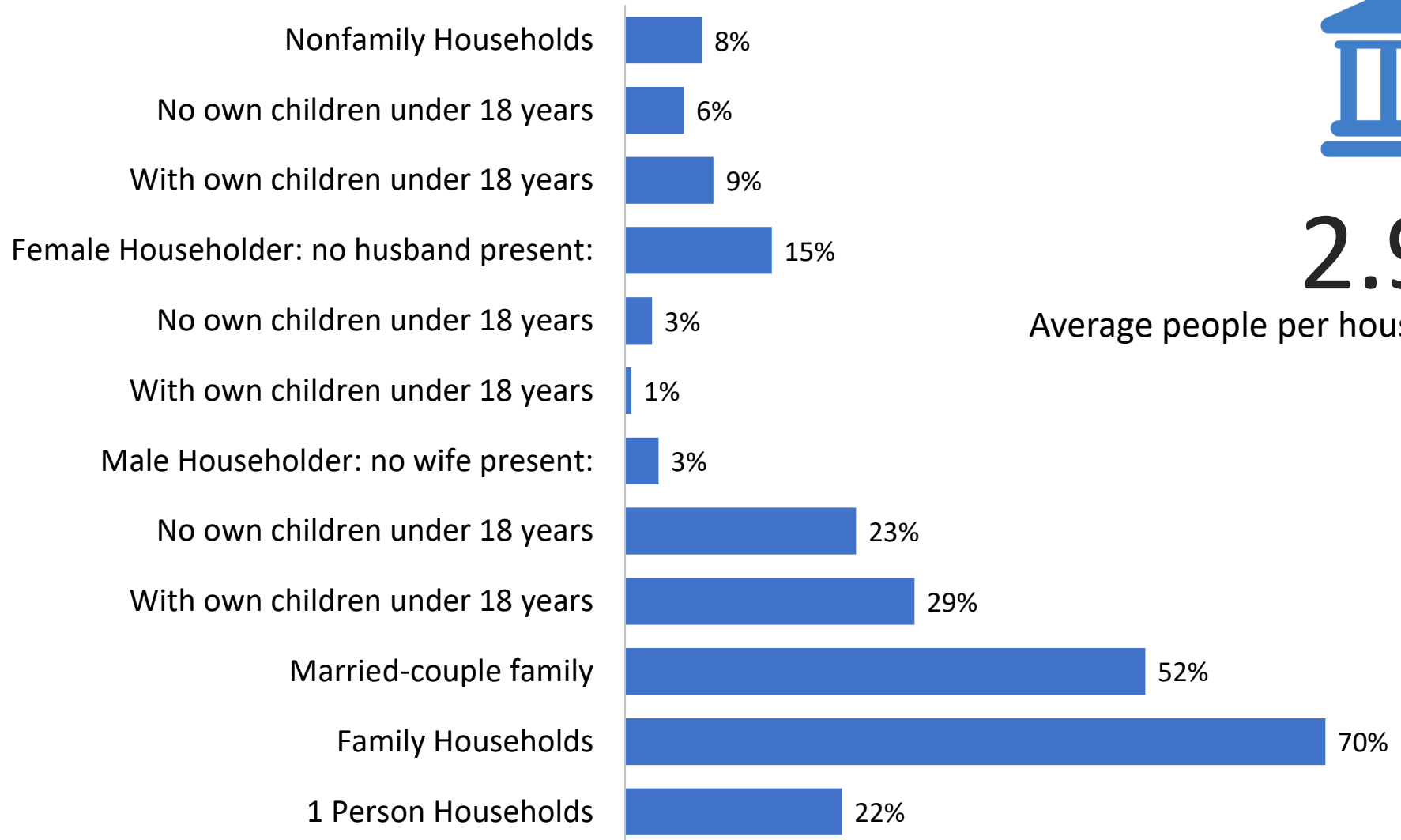


\$382,637
average housing unit value



DISCOVER: Custom Trade Area

Our Research



2.97

Average people per household

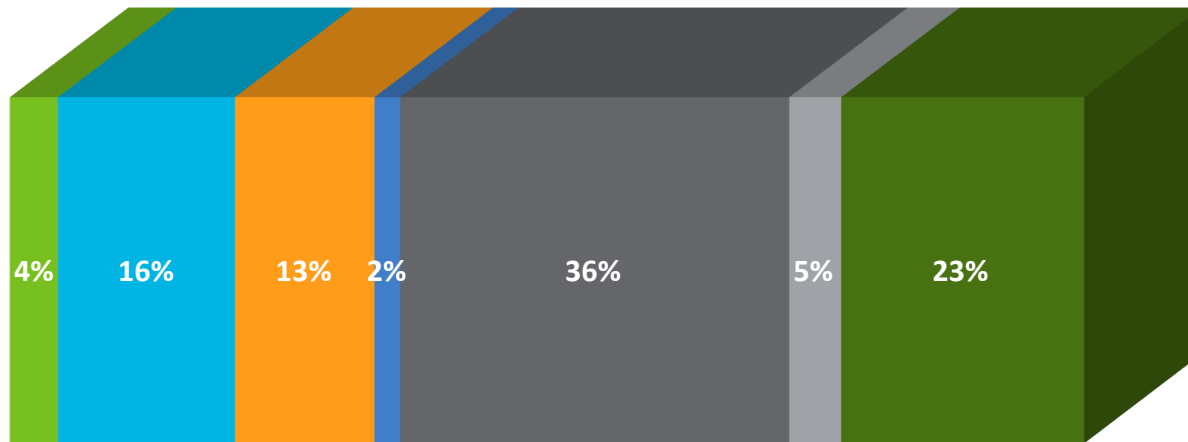


DISCOVER: Custom Trade Area

Our Research

5,543 daytime population

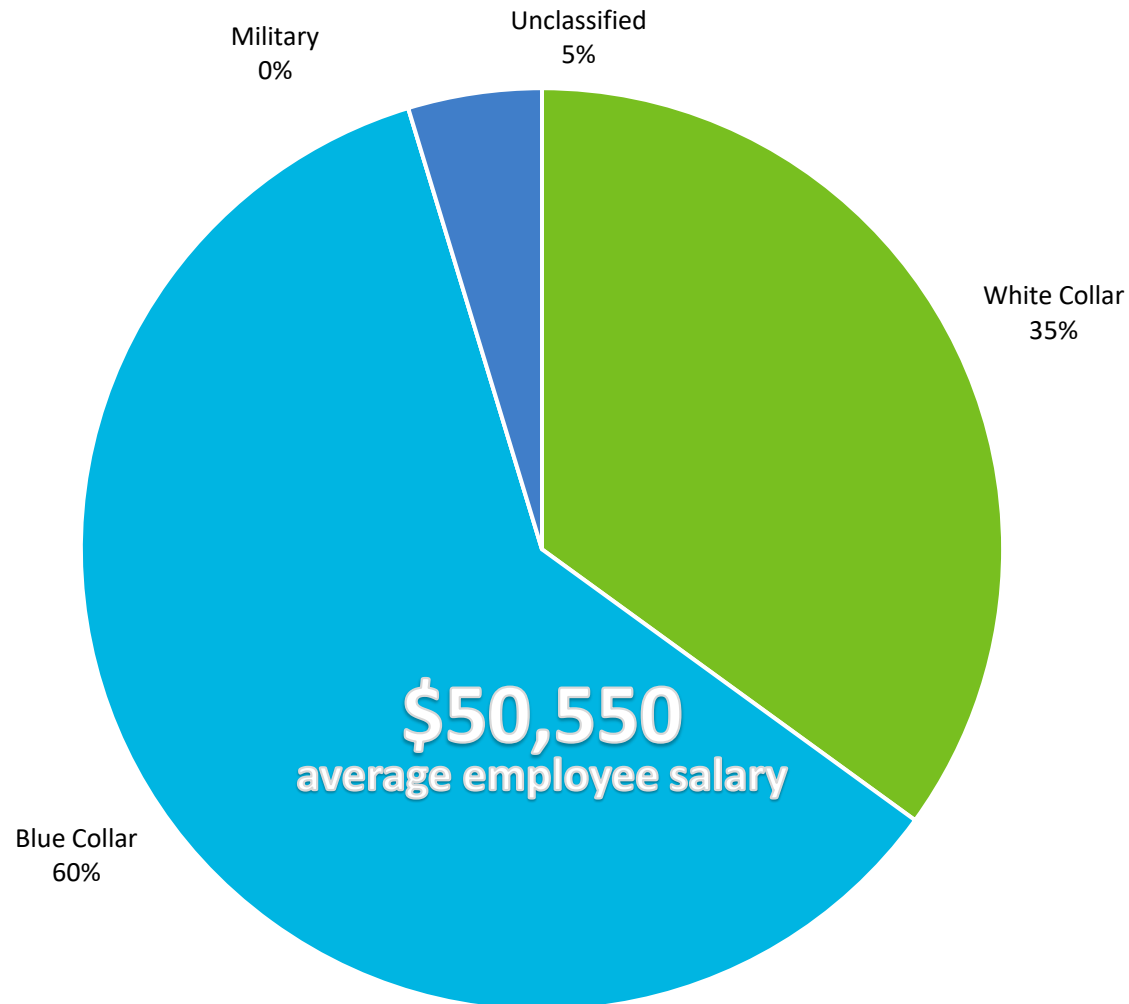
- Children at home
- Retired/Disable persons
- Homemakers
- Work at Home
- Employed
- Unemployed
- Student Populations





DISCOVER: Custom Trade Area

Our Research

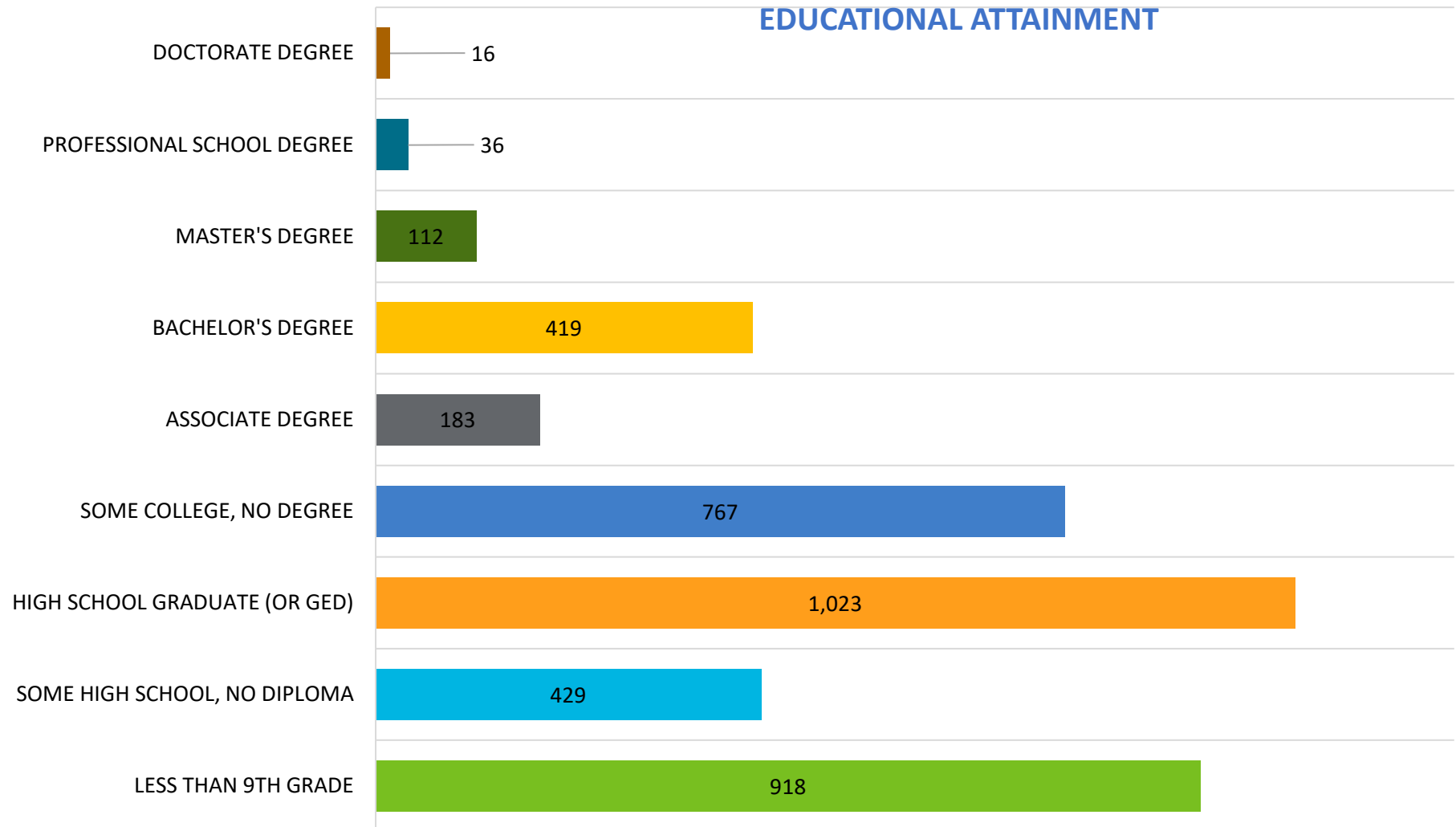




DISCOVER: Custom Trade Area

Our Research

CURRENT YEAR ESTIMATED POPULATION AGE 25+ BY EDUCATIONAL ATTAINMENT

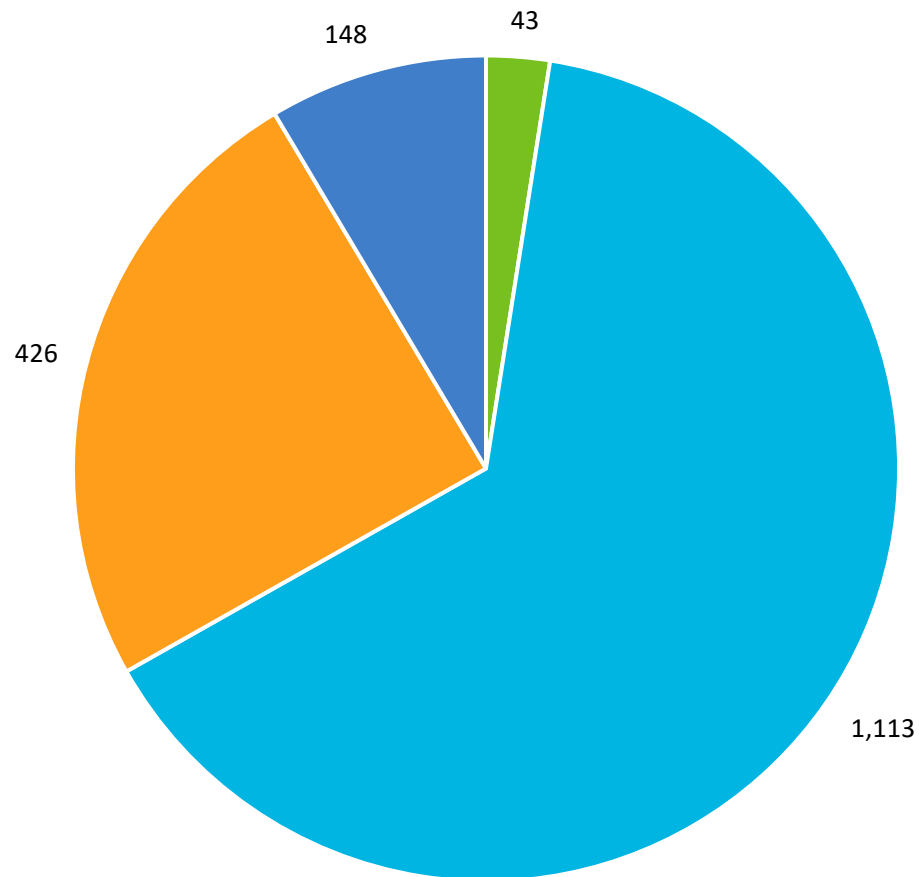




DISCOVER: Custom Trade Area

Our Research

CURRENT YEAR ESTIMATED POPULATION BY ENROLLMENT



- Nursery school/preschool
- Kindergarten/Elementary School
- High School
- College/Graduate/Professional school

DISCOVER

Research & Analytics

Lifestyle Reports allow BIG DATA to be summed up into a simple narrative on the personality of the majority of your households.

When asked to describe “Who is Pateros, WA?”, often times the community leadership describes themselves rather than the dominate personality of the area. Understanding consumer shopping patterns based on personality allow Retail strategies to better align the retail prospects with the purchasing patterns.

Selection of the variables used to identify consumer markets begins with data that includes household characteristics such as single person or family, income, relationships (married or multigenerational), and tenure; personal traits such as age, sex, education, employment, and marital status; and housing characteristics like home value or rent, type of housing (single family, apartment, town house, or mobile home), seasonal status, and owner costs relative to income. In essence, any characteristic that is likely to differentiate consumer spending and preferences is assessed for use in identifying consumer markets.



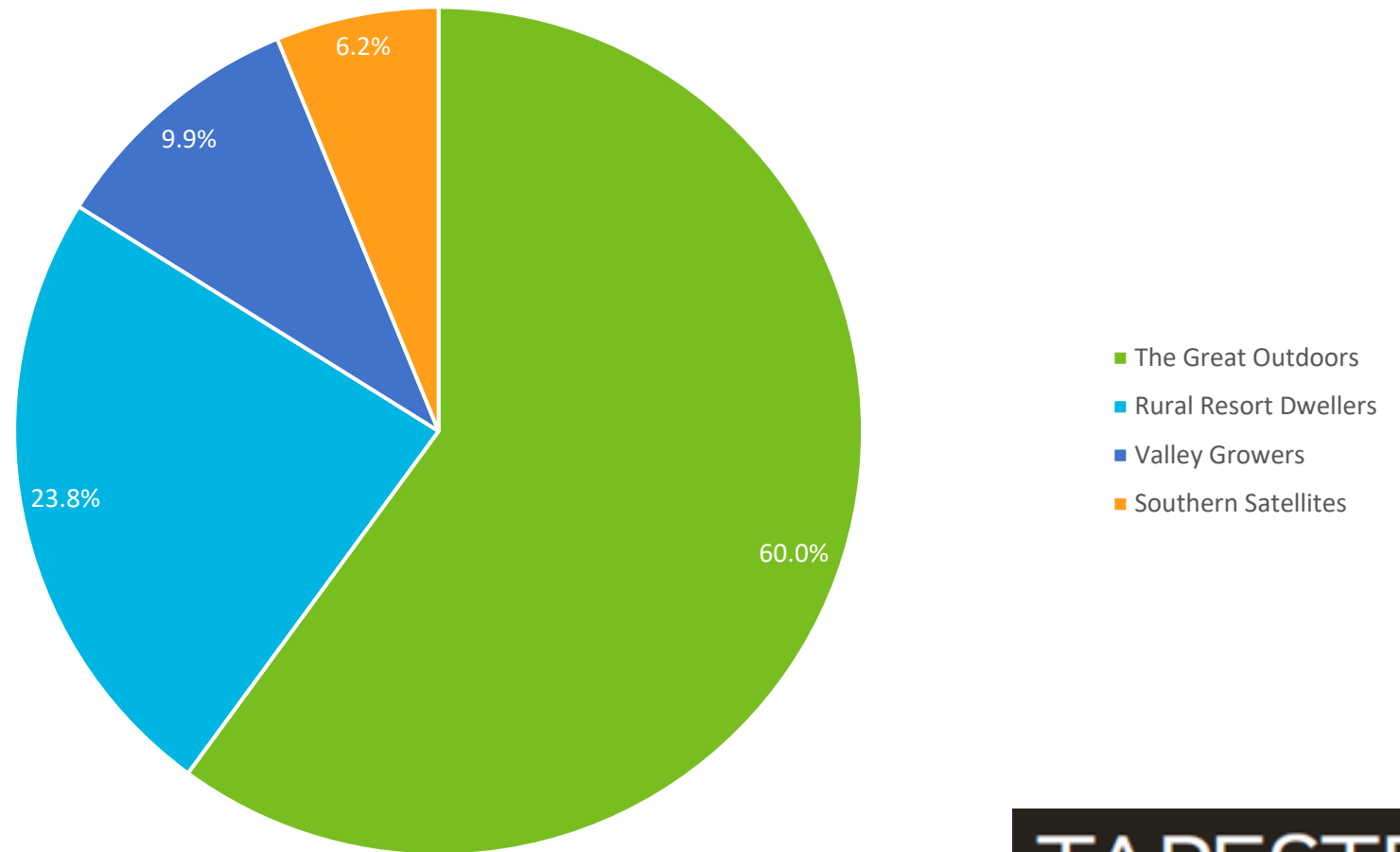
ESRI Tapestry Segmentation

is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify US neighborhoods. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Internally homogenous, externally heterogeneous market segments depict consumers' lifestyles and life stages. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local geography to create a classification model with 67 distinct, behavioral market segments.

DISCOVER

Research & Analytics

5 – Mile Radius Sweet River Bakery





LifeMode Group: Cozy Country Living

The Great Outdoors

6C

Households: 1,908,600

Average Household Size: 2.44

Median Age: 47.4

Median Household Income: \$56,400

WHO ARE WE?

These neighborhoods are found in pastoral settings throughout the United States. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. They are active gardeners and partial to homegrown and home-cooked meals. Although retirement beckons, most of these residents still work, with incomes slightly above the US level.

OUR NEIGHBORHOOD

- Over 55% of households are married-couple families; 36% are couples with no children living at home.
- Average household size is slightly smaller at 2.44.
- Typical of areas with rustic appeal, the housing inventory features single-family homes (77%) and mobile homes (15%); a significant inventory of seasonal housing is available (Index 397).
- Residents live in small towns and rural communities throughout the West, South, and Northeast regions of the country.
- More than half of all homes were constructed between 1970 and 2000.
- Most households have one or two vehicles; average travel time to work is slightly higher (28 minutes) despite a disproportionate number that work from home (Index 149).

SOCIOECONOMIC TRAITS

- 60% have attended college or hold a degree.
- Unemployment is lower at 4.8% (Index 88), but so is labor force participation at 60%.
- Typical of neighborhoods with older residents, income from retirement and Social Security is common, but residents also derive income from self-employment and investments.
- Residents are very do-it-yourself oriented and cost conscious.
- Many service their own autos, work on home improvement and remodeling projects, and maintain their own yards.
- They prefer domestic travel to trips abroad.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GK MRI.



MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Satellite dishes and riding lawn mowers are familiar sights in these rural settings, along with multiple vehicles; four-wheel drive trucks are popular, too.
- Residents are members of AARP and veterans' clubs and support various civic causes.
- Technology is not central in their lives: light use of Internet connectivity for shopping to entertainment.
- Most households have pets—dogs or cats.
- Television channels such as CMT, History, and Fox News are popular.
- They enjoy outdoor activities such as hiking, hunting, fishing, and boating.

HOUSING

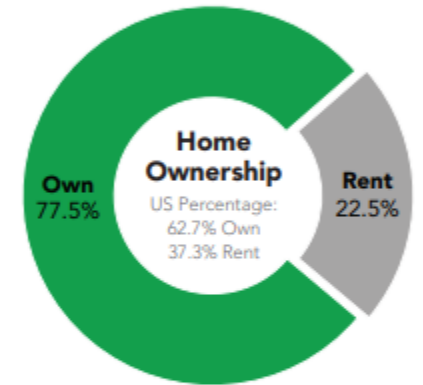
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

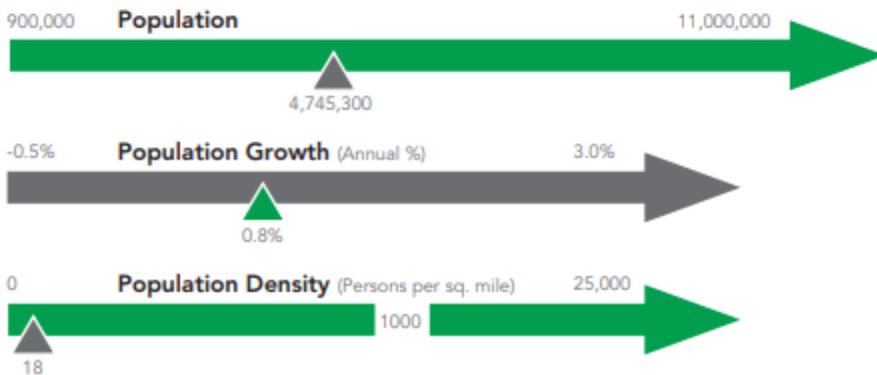
Median Value:
\$239,500

US Median: \$207,300



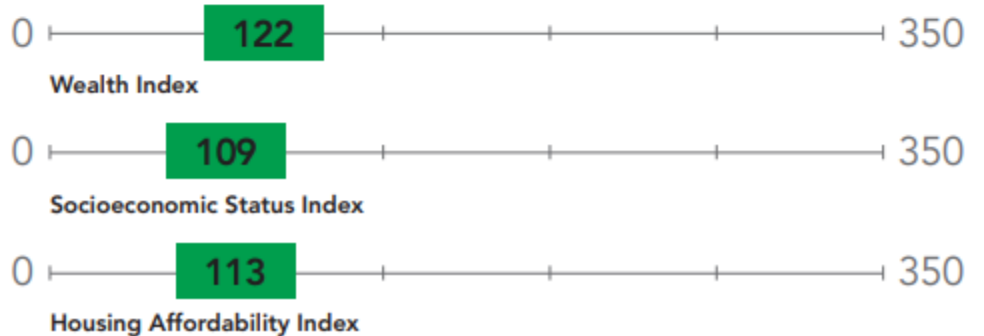
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

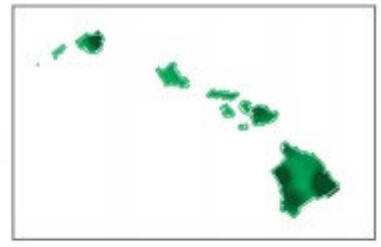
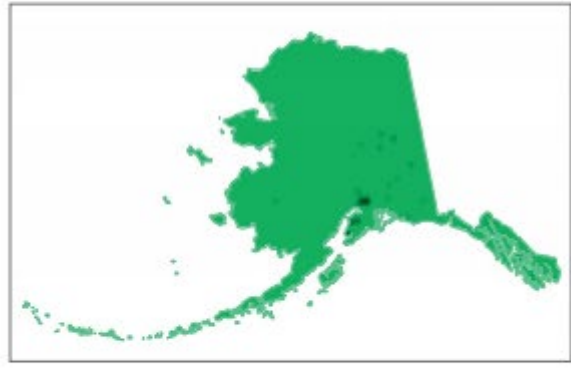
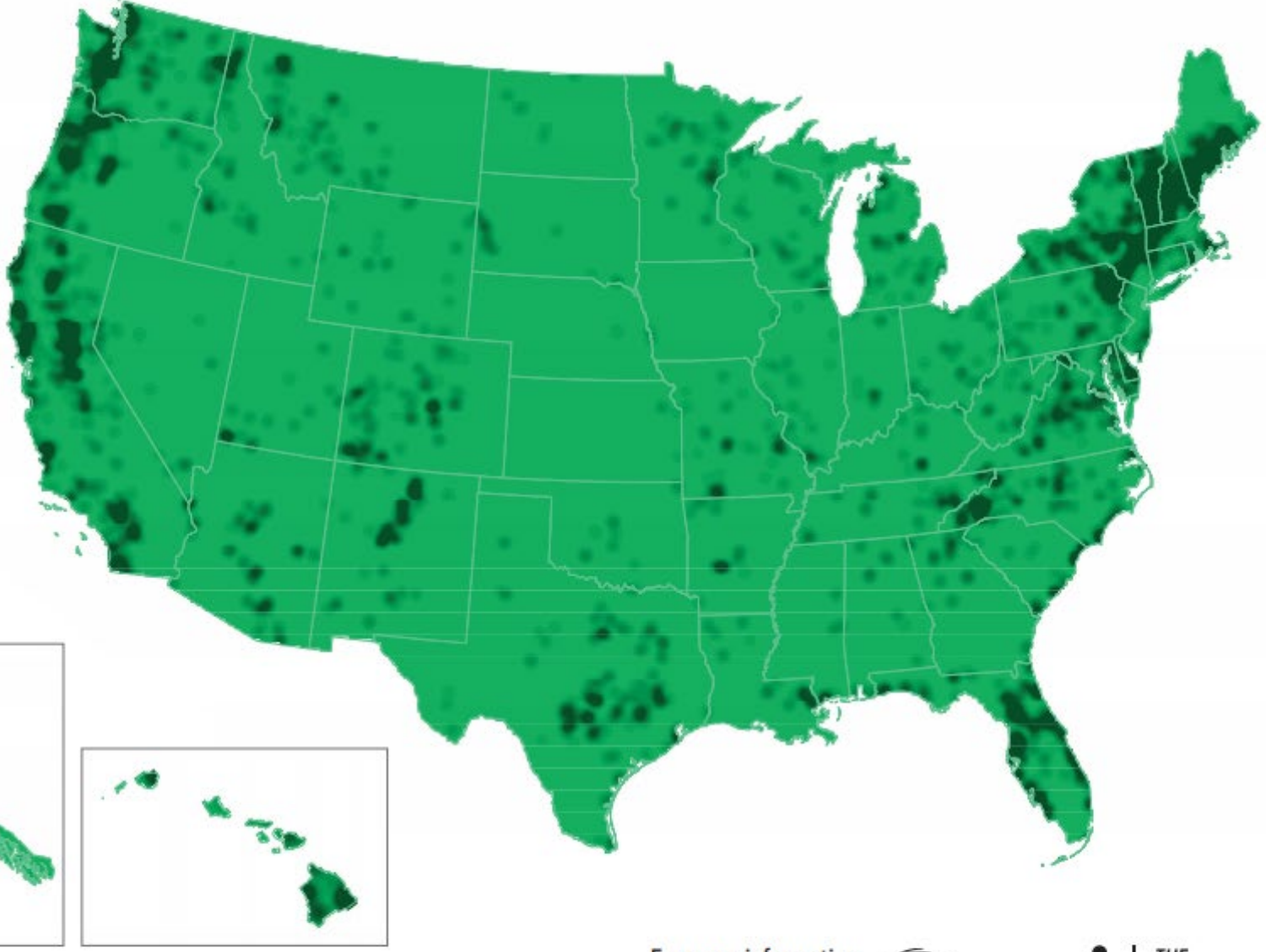
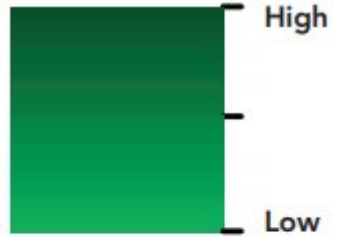
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *The Great Outdoors* Tapestry Segment by households.



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For more information
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esri.com



esri

THE
SCIENCE
OF
WHERE™



LifeMode Group: Cozy Country Living

Rural Resort Dwellers

6E

Households: 1,227,200

Average Household Size: 2.22

Median Age: 54.1

Median Household Income: \$50,400

WHO ARE WE?

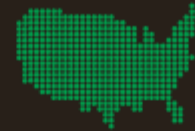
Although the Great Recession forced many owners of second homes to sell, *Rural Resort Dwellers* residents remain an active market, just a bit smaller. These communities are centered in resort areas, many in the Midwest, where the change in seasons supports a variety of outdoor activities. Retirement looms for many of these blue collar, older householders, but workers are postponing retirement or returning to work to maintain their current lifestyles. Workers are traveling further to maintain employment. They are passionate about their hobbies, like freshwater fishing and hunting, but otherwise have very simple tastes.

OUR NEIGHBORHOOD

- Housing is owner-occupied, single-family homes, with some mobile homes. A strong market for second homes, these rural areas contain homes valued near the US median. Over half of the housing units are vacant due to a high seasonal vacancy rate.
- In this older market, 42% of households consist of married couples with no children at home, while another 28% are single person. Married couples with children at home have older school-age children.
- Set in scenic rural locations with proximity to outdoor activities, two vehicles are essential to get around.

SOCIOECONOMIC TRAITS

- *Rural Resort Dwellers* residents are close to retirement. They've accumulated wealth and begun to shift their portfolios to low-risk assets. These active residents continue to work in skilled occupations.
- Simple tastes and modesty characterize these blue collar residents. They shop for timeless, comfortable clothing, but only when something must be replaced. They pay little attention to advertising and usually stick to the brands they know.
- They spend time with their spouses and also maintain a social calendar.



MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Residents drive older domestic vehicles and prefer to spend their disposable income on gear to support their hobbies, which include freshwater fishing, hunting with a rifle or shotgun, and motorcycling.
- At home, *Rural Resort Dwellers* residents spend any free time working on their vehicles and maintaining their gear. They make frequent trips to their local hardware store for parts and tools. These hands-on consumers are also passionate about vegetable gardening.
- Due to their remote locations, these neighborhoods have satellite dishes. A few residents still rely on dial-up modems to stay connected. They don't access the Internet often but will make online purchases for items difficult to find in nearby stores.
- Their taste in TV shows reflects their hobbies—National Geographic, Discovery Channel, and the Weather Channel.

HOUSING

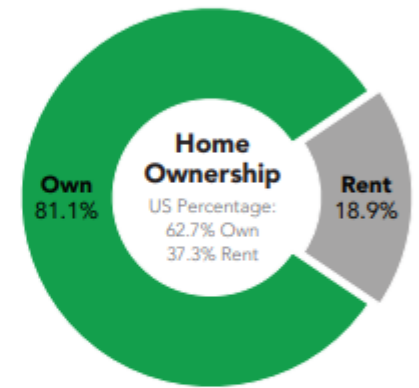
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family/Seasonal

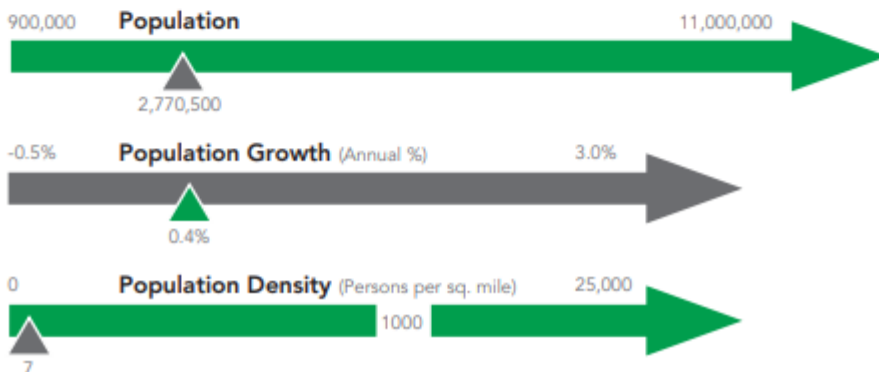
Median Value:
\$209,200

US Median: \$207,300



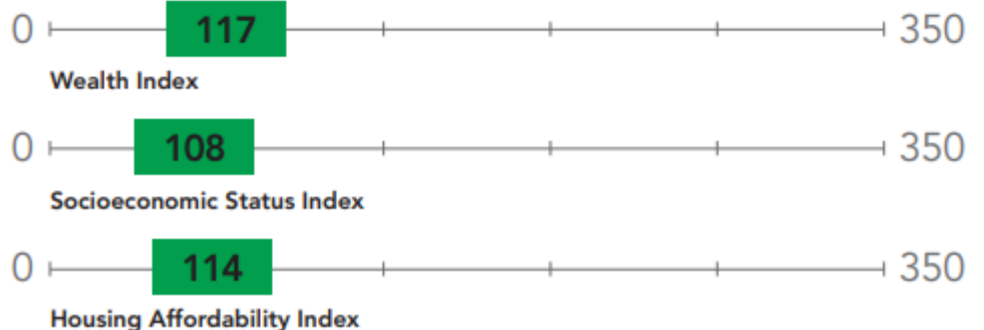
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Cozy Country Living

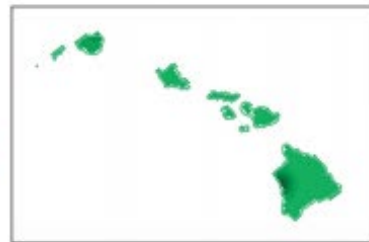
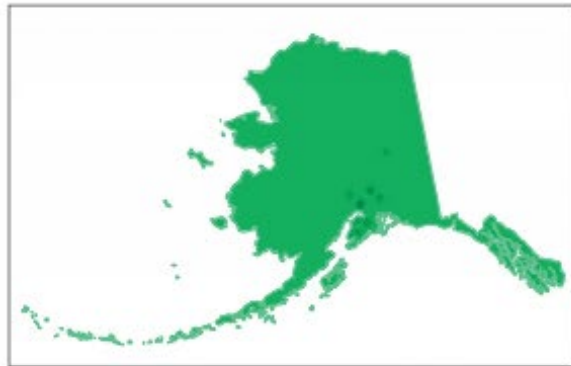
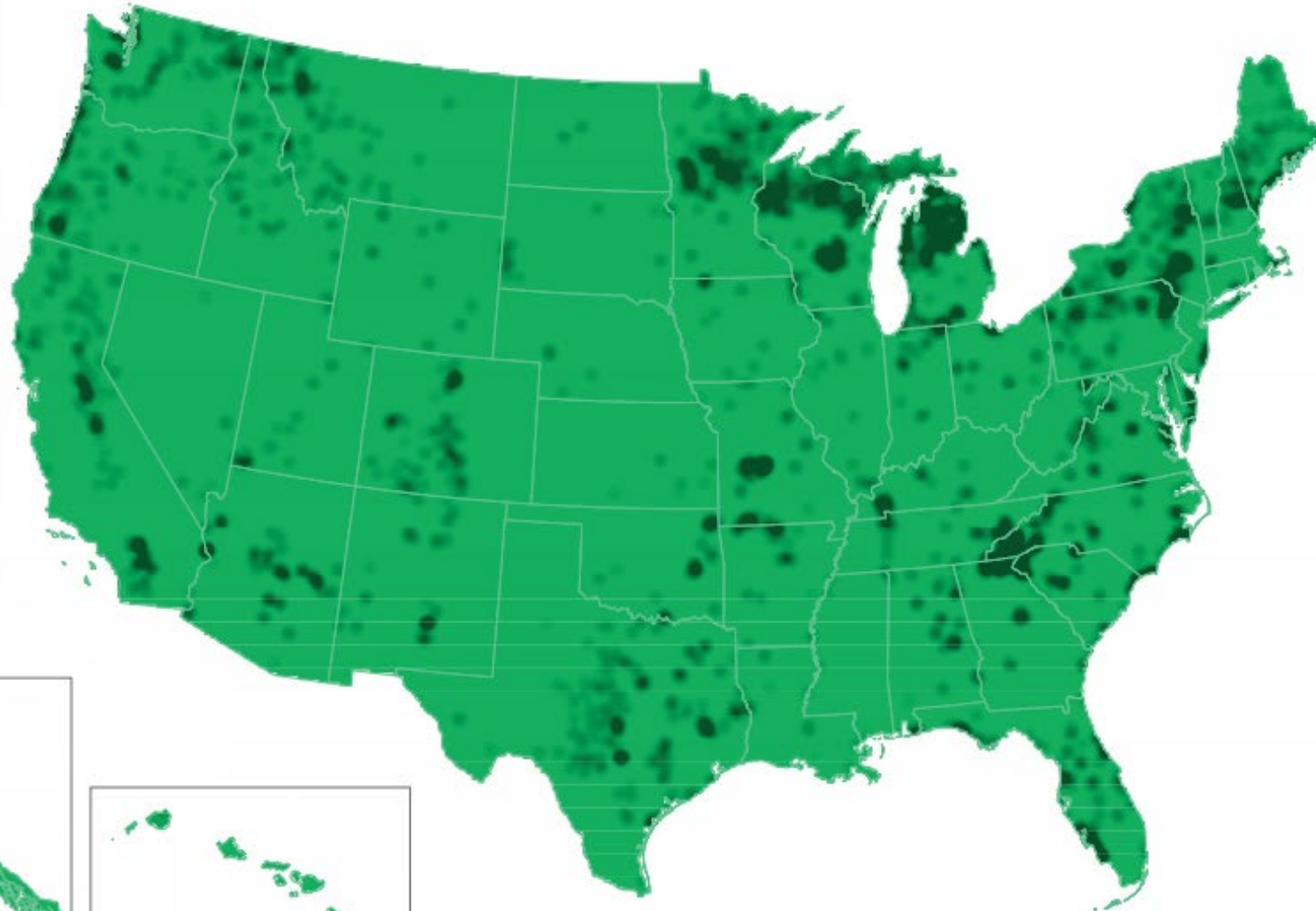
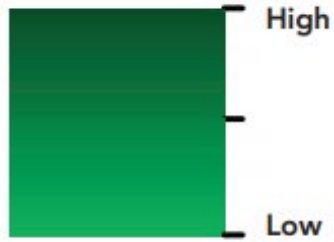
Rural Resort Dwellers



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Rural Resort Dwellers* Tapestry Segment by households.



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05/2020/03/2020

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info@esri.com
esri.com



esri

THE
SCIENCE
OF
WHERE™



DISCOVER

Understanding the GAP Analysis:

The GAP Analysis helps us uncover the number of dollars being spent outside of the community on an annual basis from a categorical perspective.

Retail Strategies uses STI:PopStats as our provider of the Consumer Demand and Supply by Establishment (or GAP) information. Several demographers provide the data in a variety of ways. Following are the sources and methodologies used by STI:PopStats and Retail Strategies to draw conclusions for you.

The market supply data is derived from annual retail sales and expenditures from the source data. The source for market supply is U.S. Census Bureau's monthly and annual Census of Retail Trade (CRT) Reports; U.S. Census Bureau's Economic Census. The source for the establishment is Bureau of Labor Statistics (BLS). The consumer demand data by establishment is derived from the BLS Consumer Expenditure Survey (CE).

The difference between demand and supply represents the opportunity gap or surplus available for each merchandise line in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that merchandise line. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

Industries for the consumer expenditures survey are categorized and defined by the North American Industry Classification System (NAICS). Retail Strategies has narrowed down the categories to only those with real estate growth potential based on national trends.

Data is rarely perfect, but with proper analysis can get us a lot closer to the answer than we would be without it. This is one of several tools used to identify focus categories for recruitment. Our focus is more on the category than the actual dollar amounts.

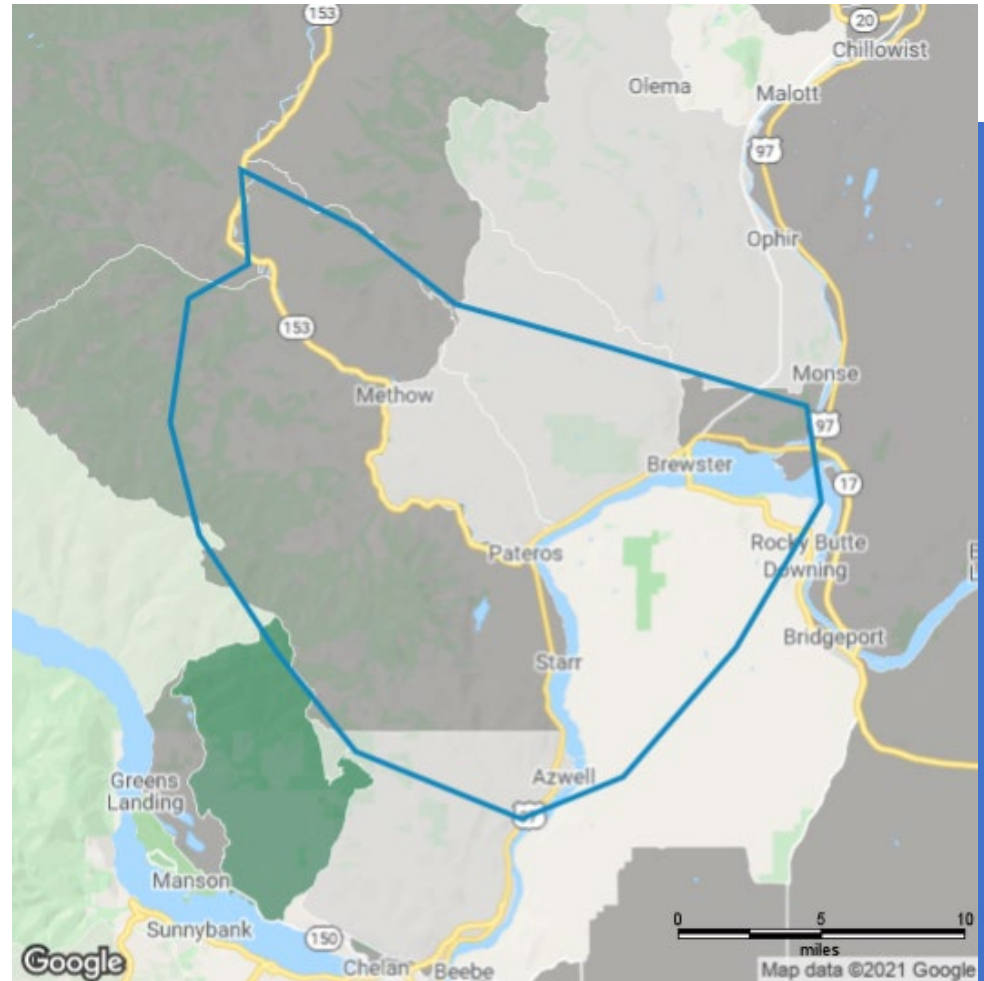


DISCOVER: Custom Trade Area

Total Market Supply

Total Market Supply
\$48,998,711

This represents the amount captured by businesses located in the defined trade area. By block group the areas with darker green captured more dollars than the gray areas.





DISCOVER: Custom Trade Area

Total Market Demand

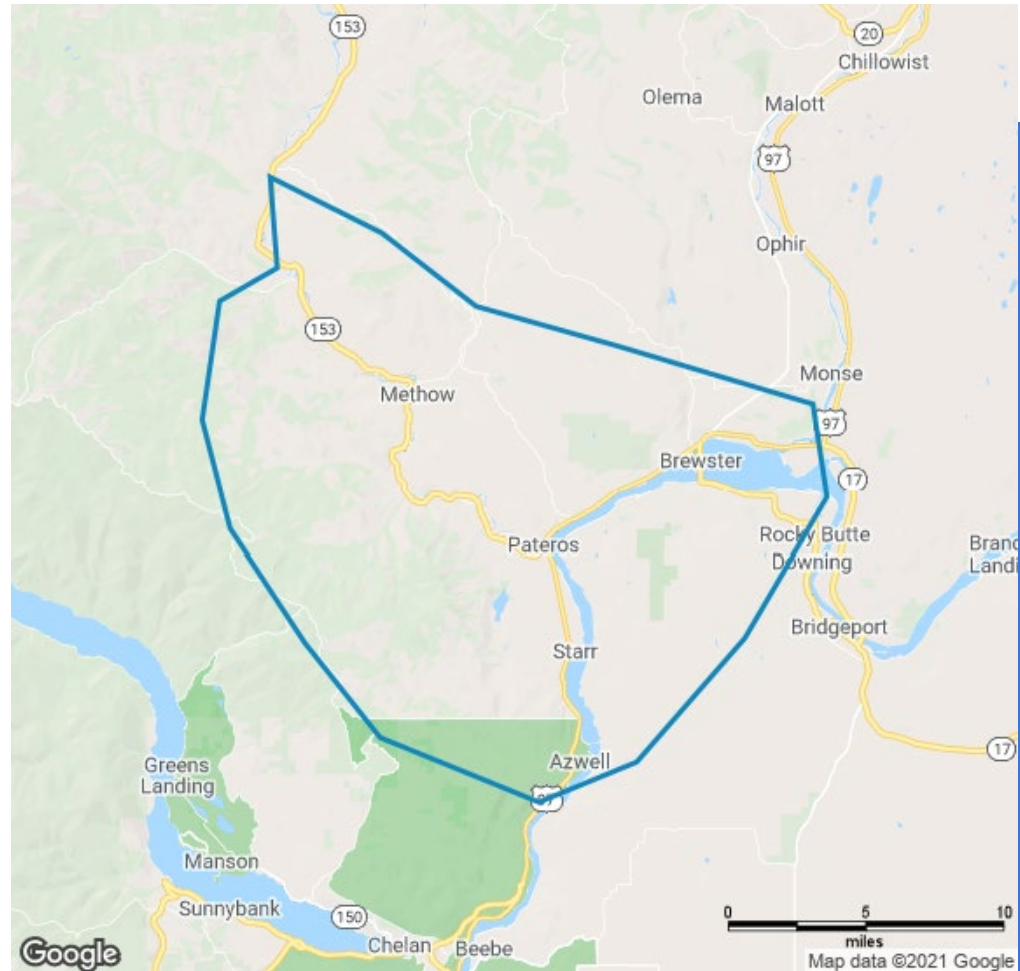
Total Market Demand

\$123,385,002

This represents the amount spent by consumers located in the defined trade area. By block group the areas with darker green captured more dollars than the gray areas.

Total Consumer Demand

- \$1 to \$5MM
- \$5MM to \$10MM
- \$10MM to \$25MM
- \$25MM to \$50MM
- \$50MM to \$75MM
- \$75MM to \$100MM
- > \$100MM



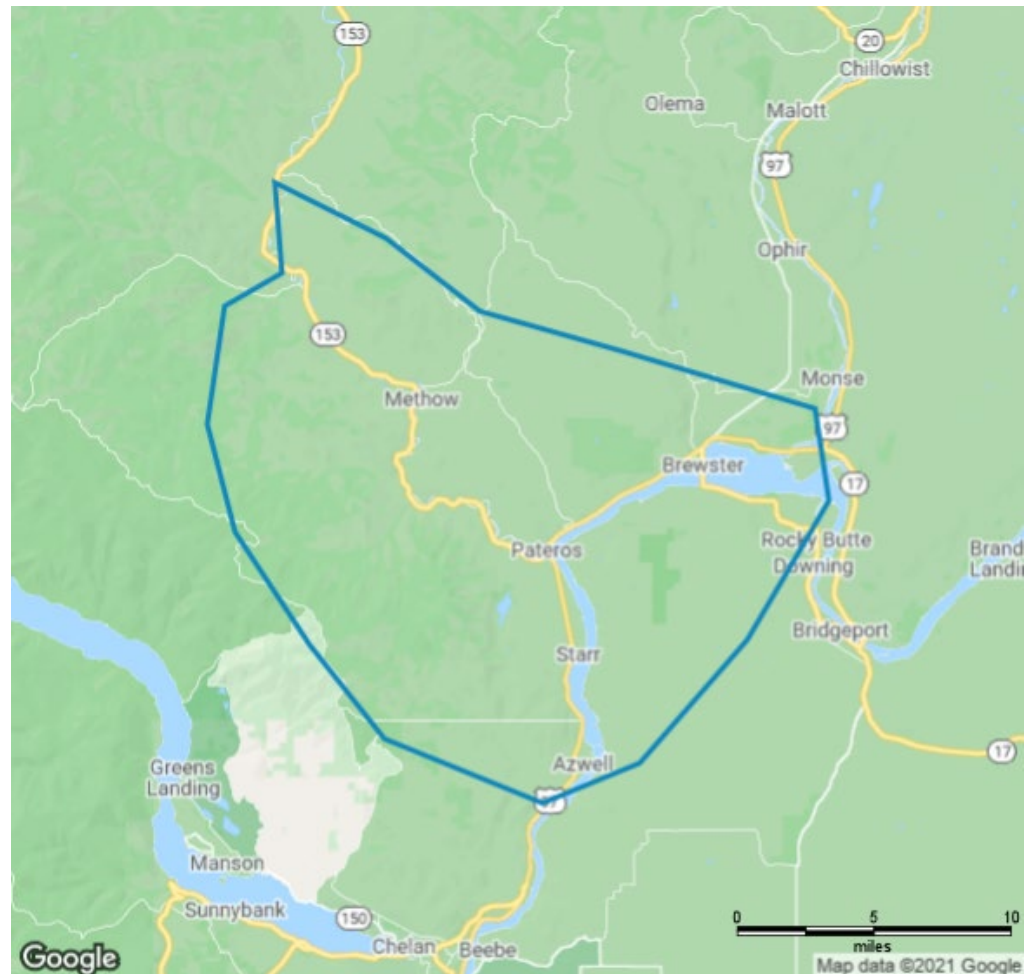


DISCOVER: Custom Trade Area

Opportunity Gap

Total Market Leakage of \$74,386,290

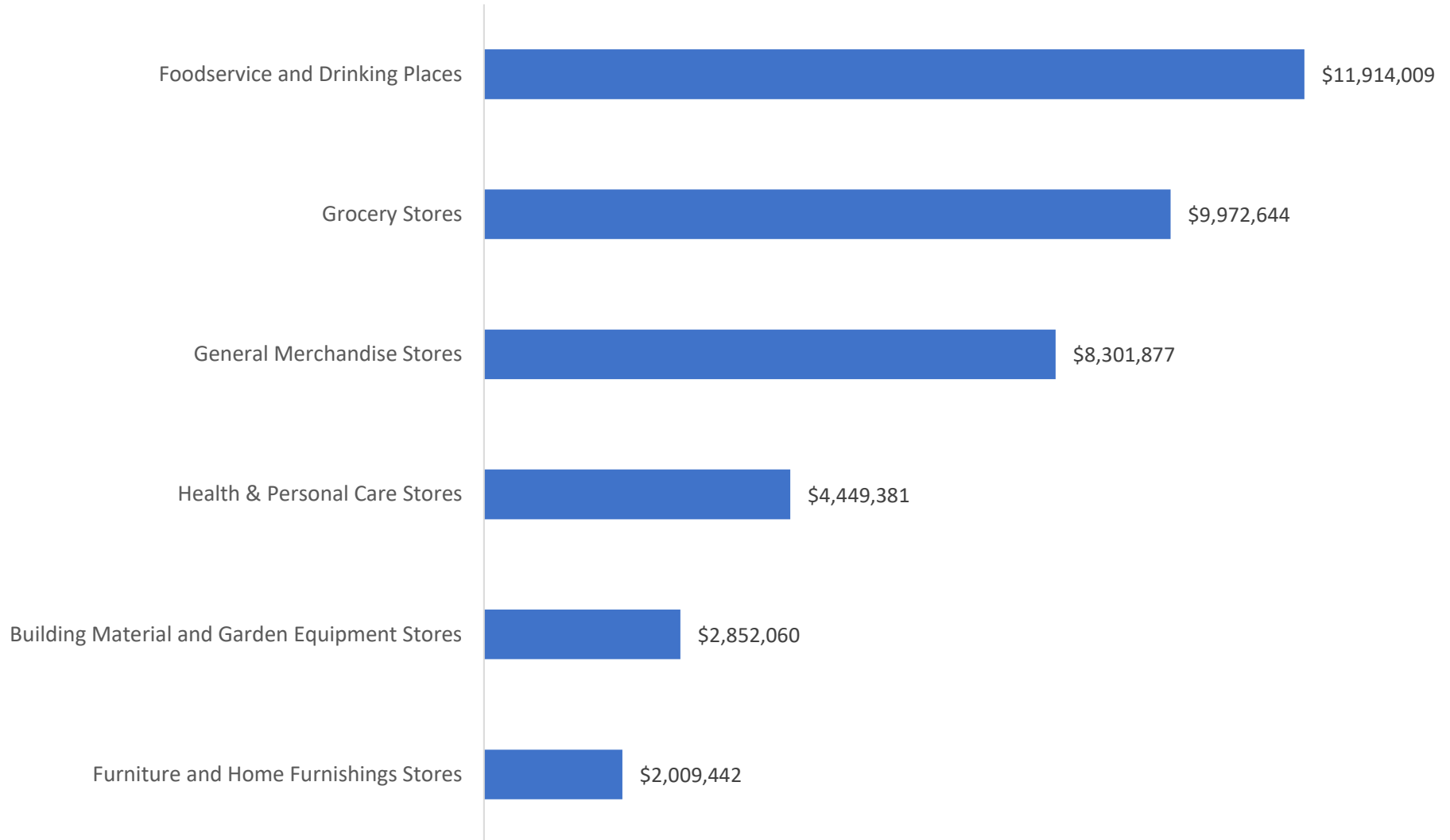
This means more people purchase items outside of the defined trade area than in the defined trade area for their consumer goods and services. Finding the specific categories where they are leaving the market is the key. Dark gray shows block groups of retail synergy capturing those dollars. This is where our focus will be to place new retailers and restaurants.





DISCOVER

Leakage (Custom Trade Area)





Retail Prospects

DISCOVER

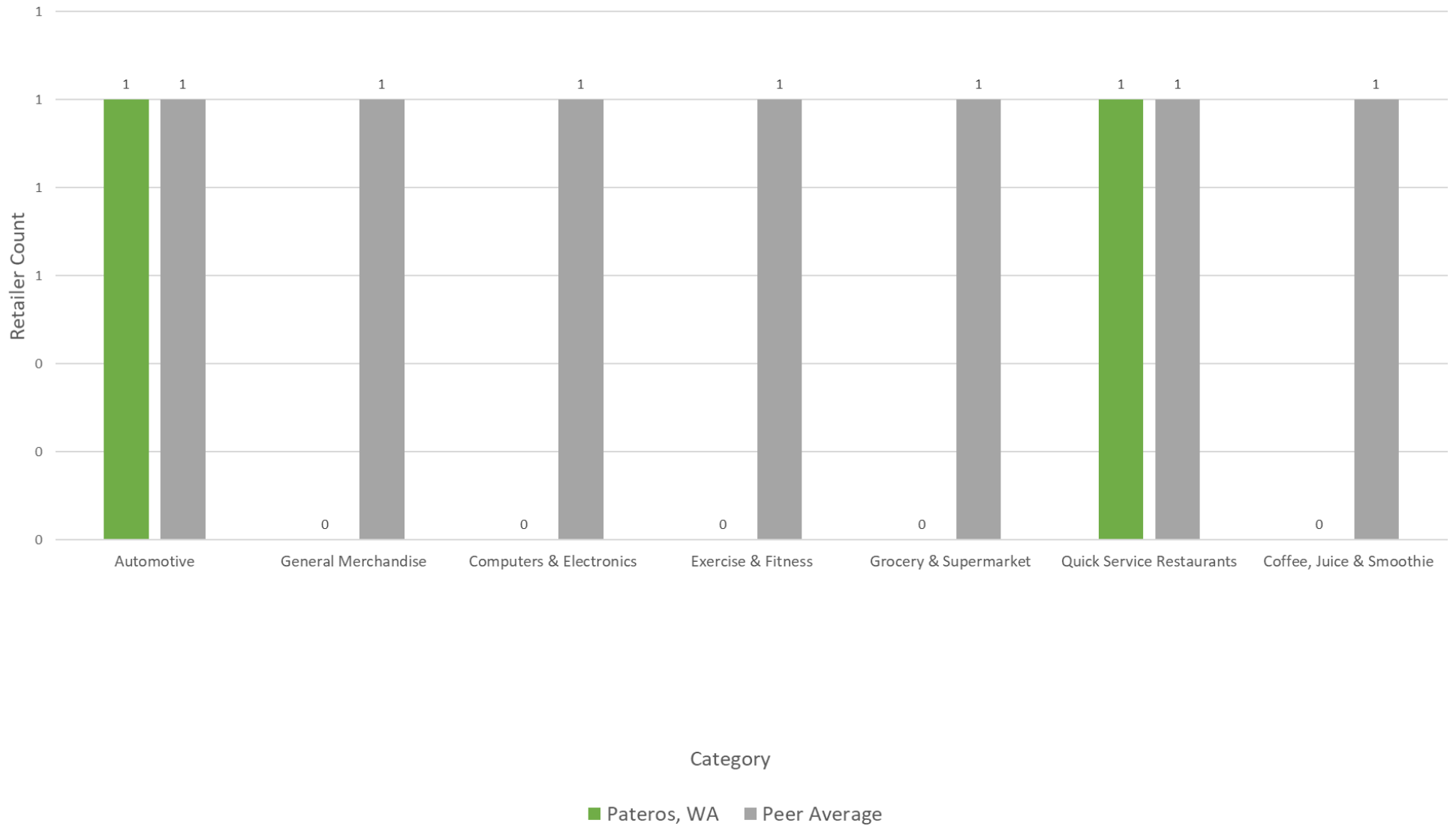
Peer Analysis

Sweet River Bakery 10 - Minute Drive Time

| City | State | Residential Pop | Employed Daytime Pop | Median HH Income | Market Supply |
|-------------|-------|-----------------|----------------------|------------------|---------------|
| Pateros | WA | 2,350 | 3,272 | \$49,990 | \$22,329,555 |
| Mccleary | WA | 4,112 | 3,489 | \$52,665 | \$28,015,406 |
| Yachats | OR | 2,707 | 2,756 | \$51,735 | \$33,542,296 |
| Westport | WA | 3,347 | 4,053 | \$46,040 | \$29,322,937 |
| Brownsville | OR | 3,289 | 3,039 | \$54,830 | \$59,288,922 |
| Clatskanie | OR | 3,741 | 3,730 | \$48,482 | \$51,885,899 |
| Vader | WA | 2,369 | 1,305 | \$56,244 | \$47,157,682 |

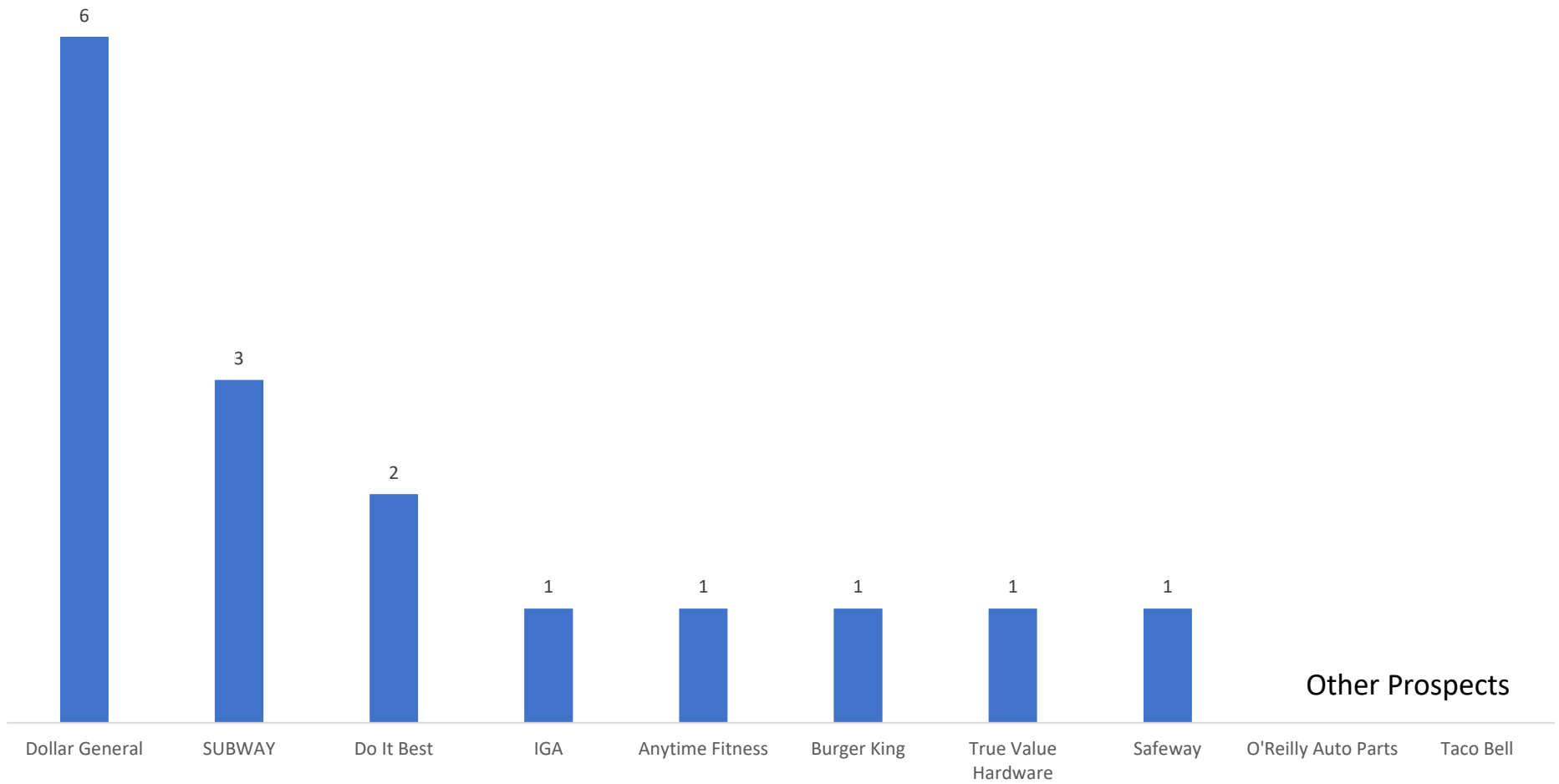
DISCOVER

Peer Analysis



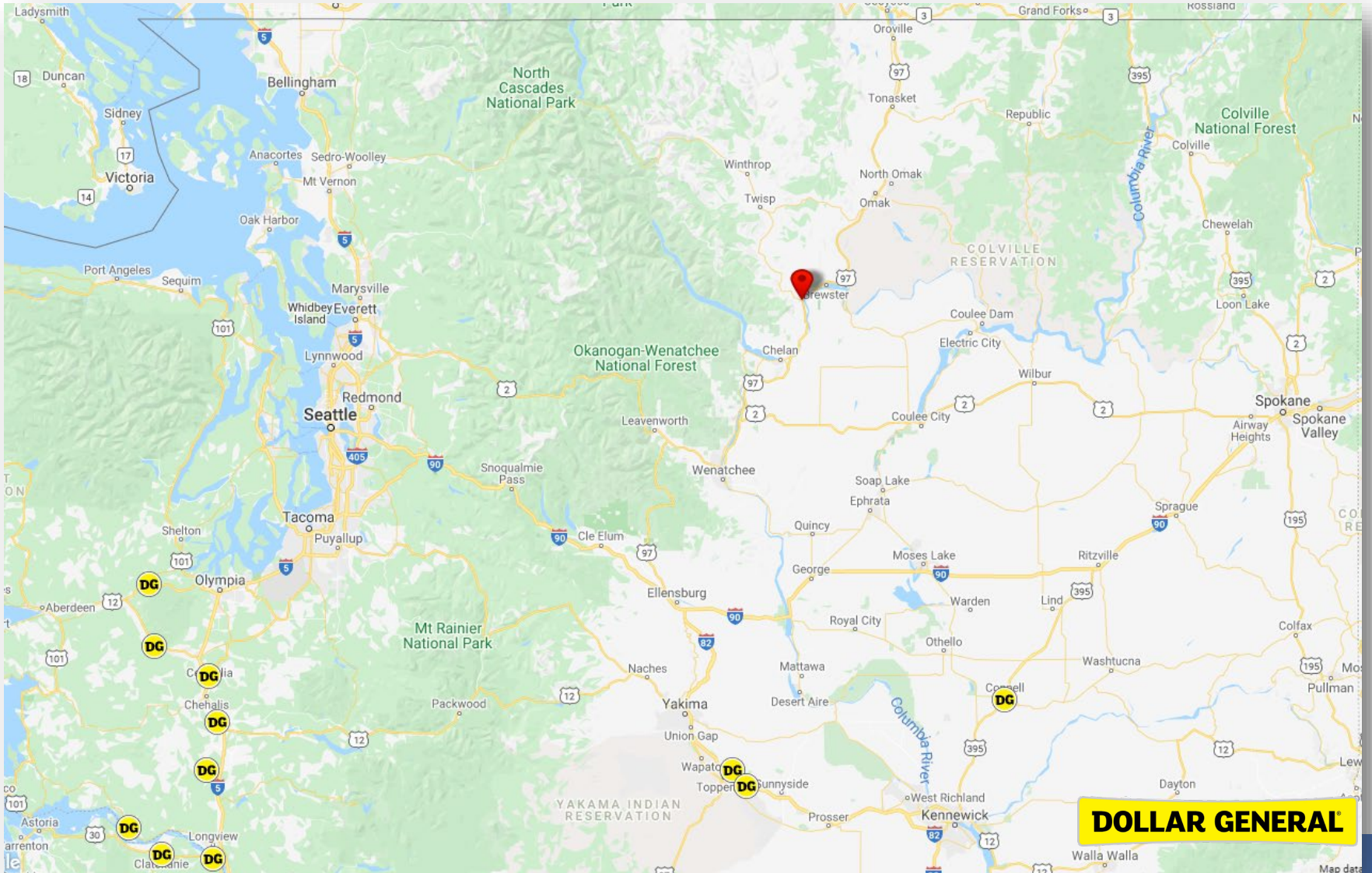
DISCOVER

Retail Prospects





Retail Prospects



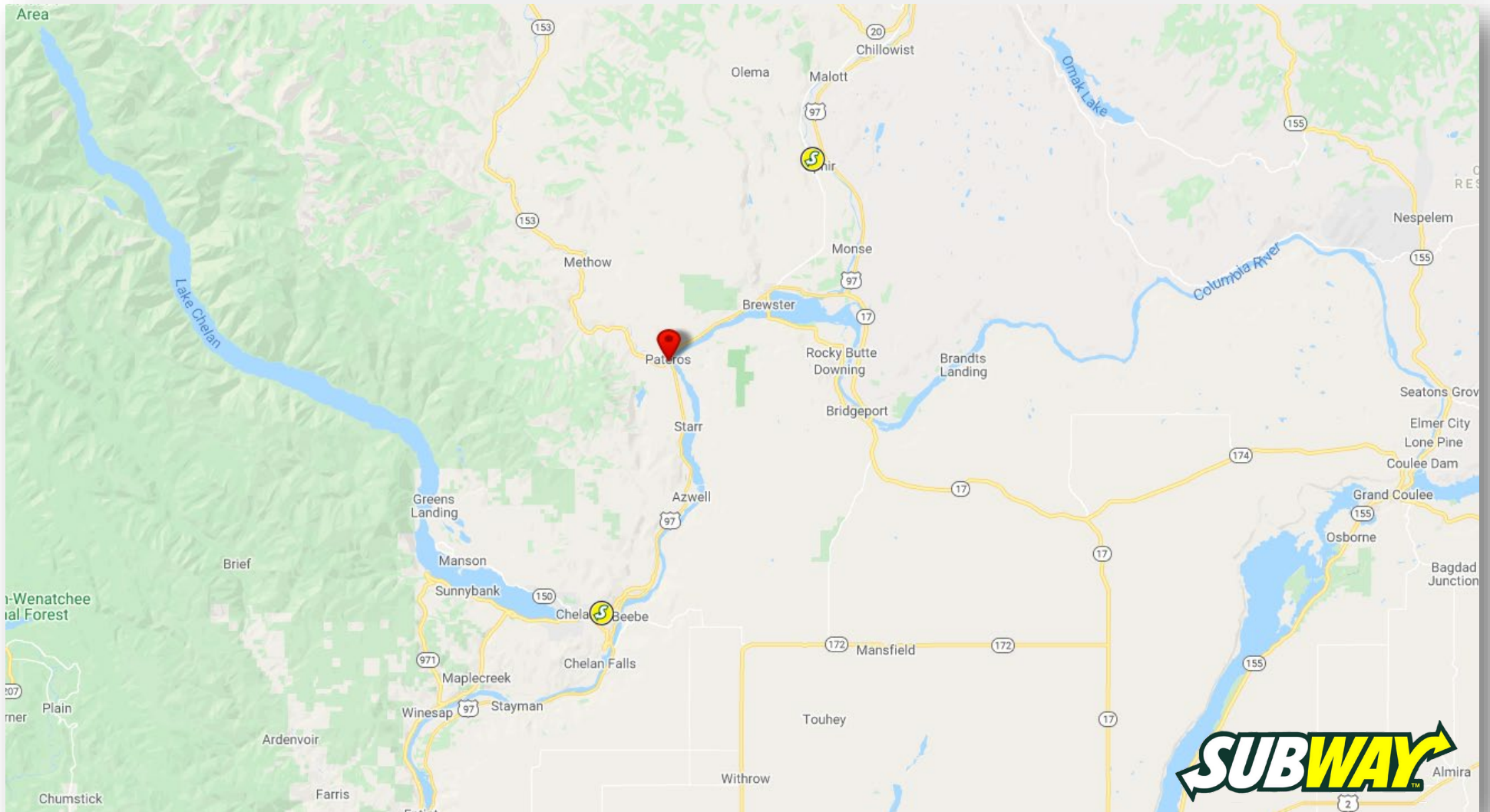
Dollar General

| | |
|--|---|
| Category: | Variety Store |
| Demographic Requirement Minimum Population Requirement: | 5,000 |
| Demographic Requirement Household Income Requirement: | \$75,000 |
| Traffic Count: | 3,000 VPD |
| Demographic Comments: | Median household income – Less than \$75,000. Traffic flow - greater than 3,000 cars per day. . |
| Number of Square Feet and/or Acres: | 9,000 SF |
| Comments on Desired Location: | 30+ convenient parking spaces. Highly visible building signage. Prominent position on shopping center pylon. No obstructions or future outparcel development in front of space. Going home side of the road preferred. Full access allowed. |

DOLLAR GENERAL®



Retail Prospects



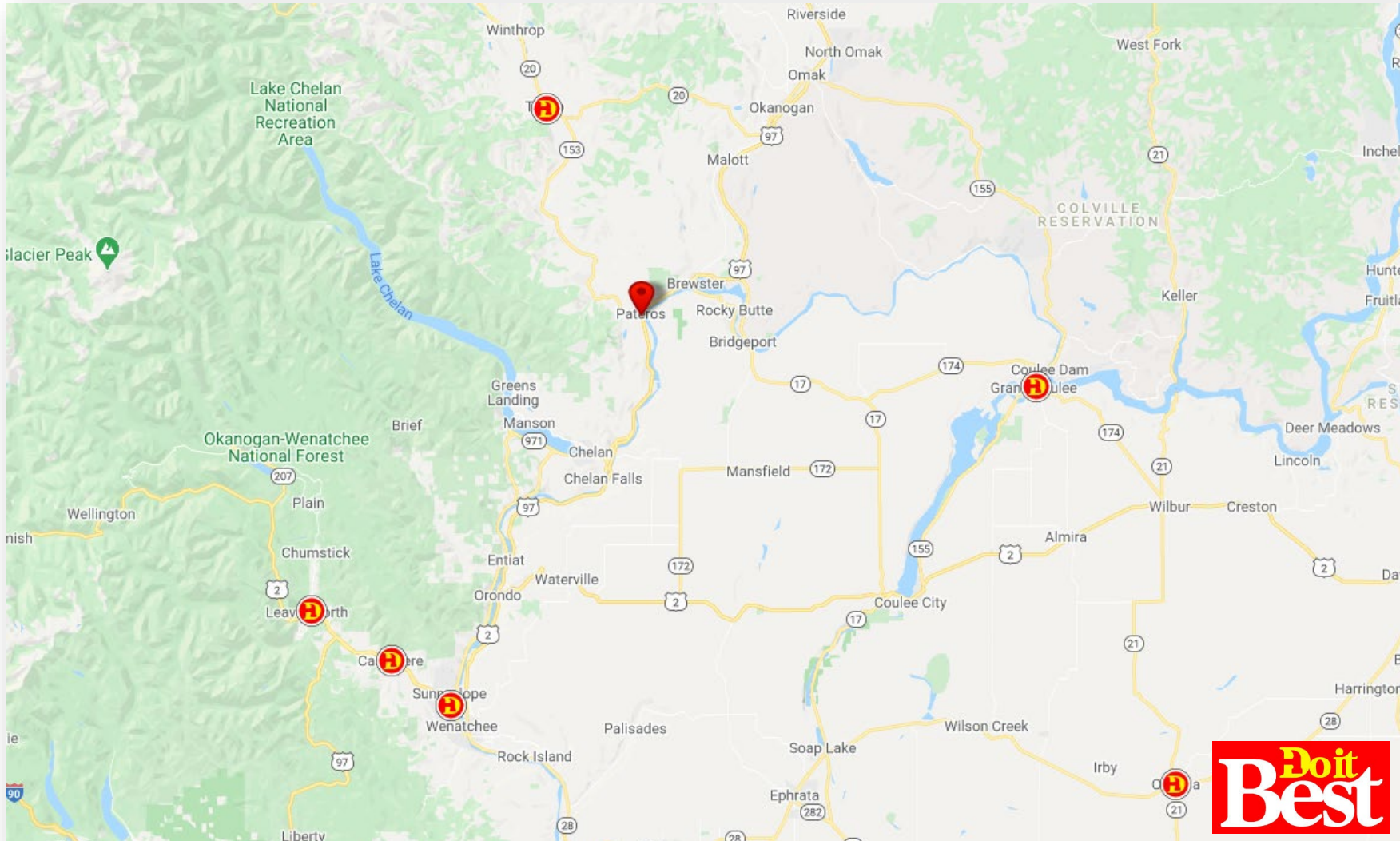
Subway

| | |
|--|--|
| Category: | Fast Food |
| Demographic Requirement Radius Ring: | Varies |
| Demographic Requirement Minimum Population Requirement: | 10,000 daytime population |
| Demographic Requirement Household Income Requirement: | Varies |
| Number of Square Feet and/or Acres: | 400 SF |
| Comments on Desired Location: | Typical restaurant measures 1,200 sq ft (20' x 60'.) However, there is flexibility with some as small as 800 sq ft and some as large as 2,000 sq ft. Prefers end cap with two sides of glass. High visibility in shopping areas with strong demographic profile. Campus Site, Downtown, Free Standing, Gas Station, Hotel Lobby, Kiosk, Lifestyle Center, Medical Center, Neighborhood Strip, Office Building, Outlet Mall, Power Center, Regional Mall, Regional Strip, Special Strip, Transit Terminal |





Retail Prospects



Do It Best

Category: Hardware Store

**Demographic Requirement
Radius Ring:** Varies

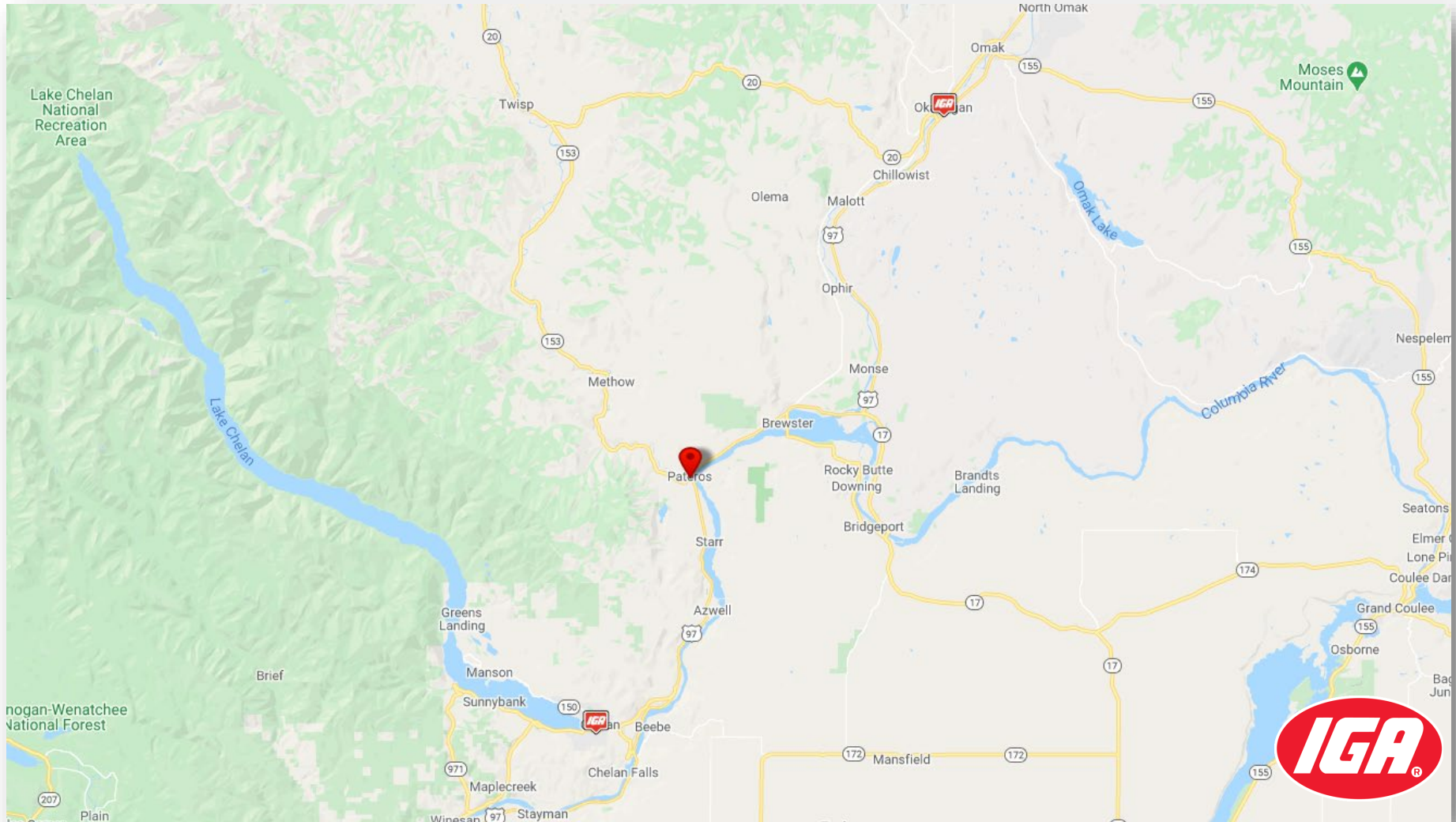
**Number of Square Feet and/or
Acres:** 2,500 SF

Facility Type: Free Standing, Neighborhood Strip, Regional Strip, Specialty Strip





Retail Prospects



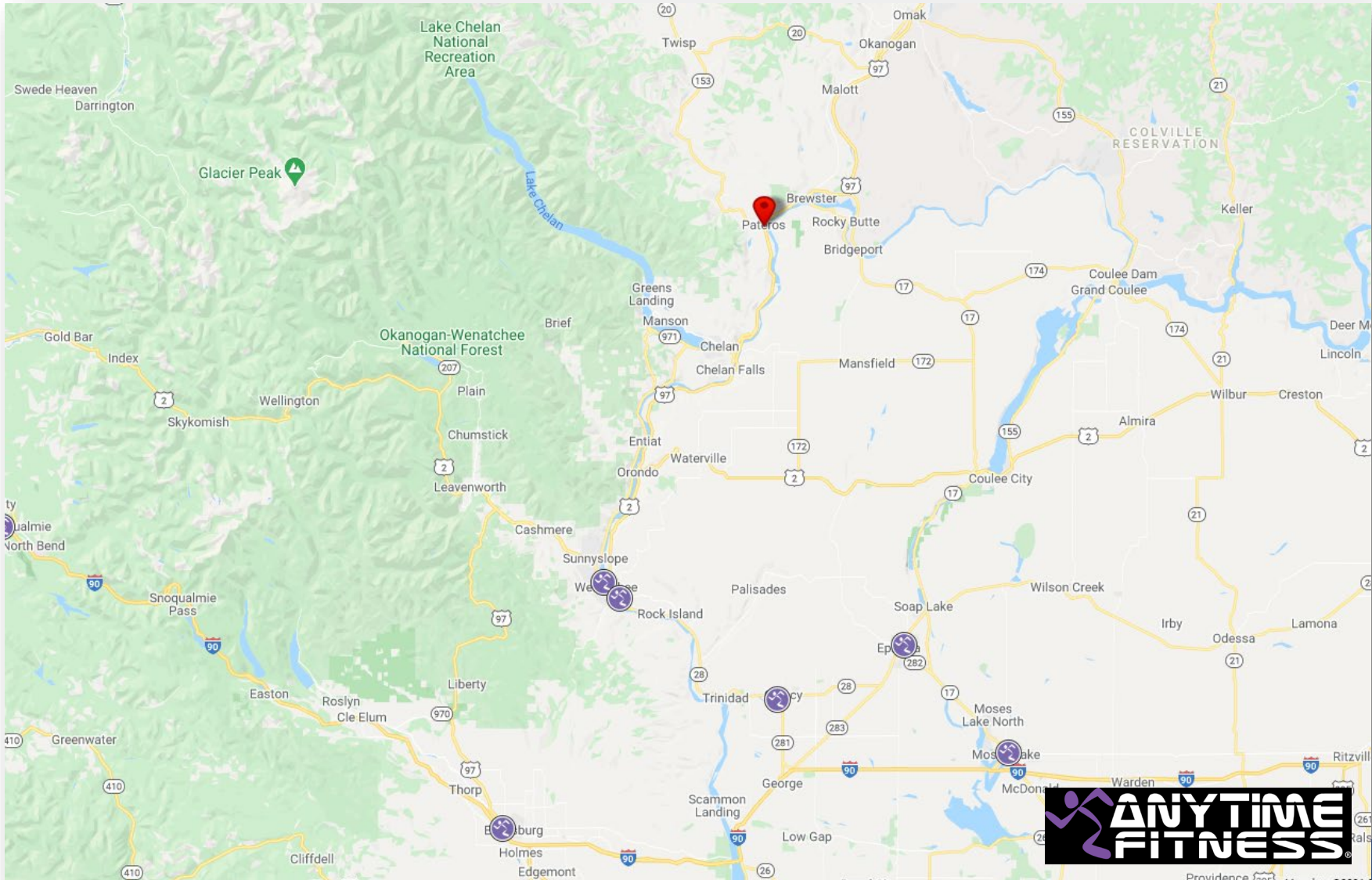
IGA

| | |
|--|---|
| Category: | Supermarket / Grocery Store |
| Demographic Requirement Radius Ring: | 5 |
| Demographic Requirement Minimum Population Requirement: | 30,000 |
| Demographic Requirement Household Income Requirement: | \$50,000+ |
| Traffic Count: | Varies |
| Number of Square Feet and/or Acres: | 15,000 SF |
| Comments on Desired Location: | Neighborhood Strip, Power Center, Regional Strip, Special Strip |





Retail Prospects



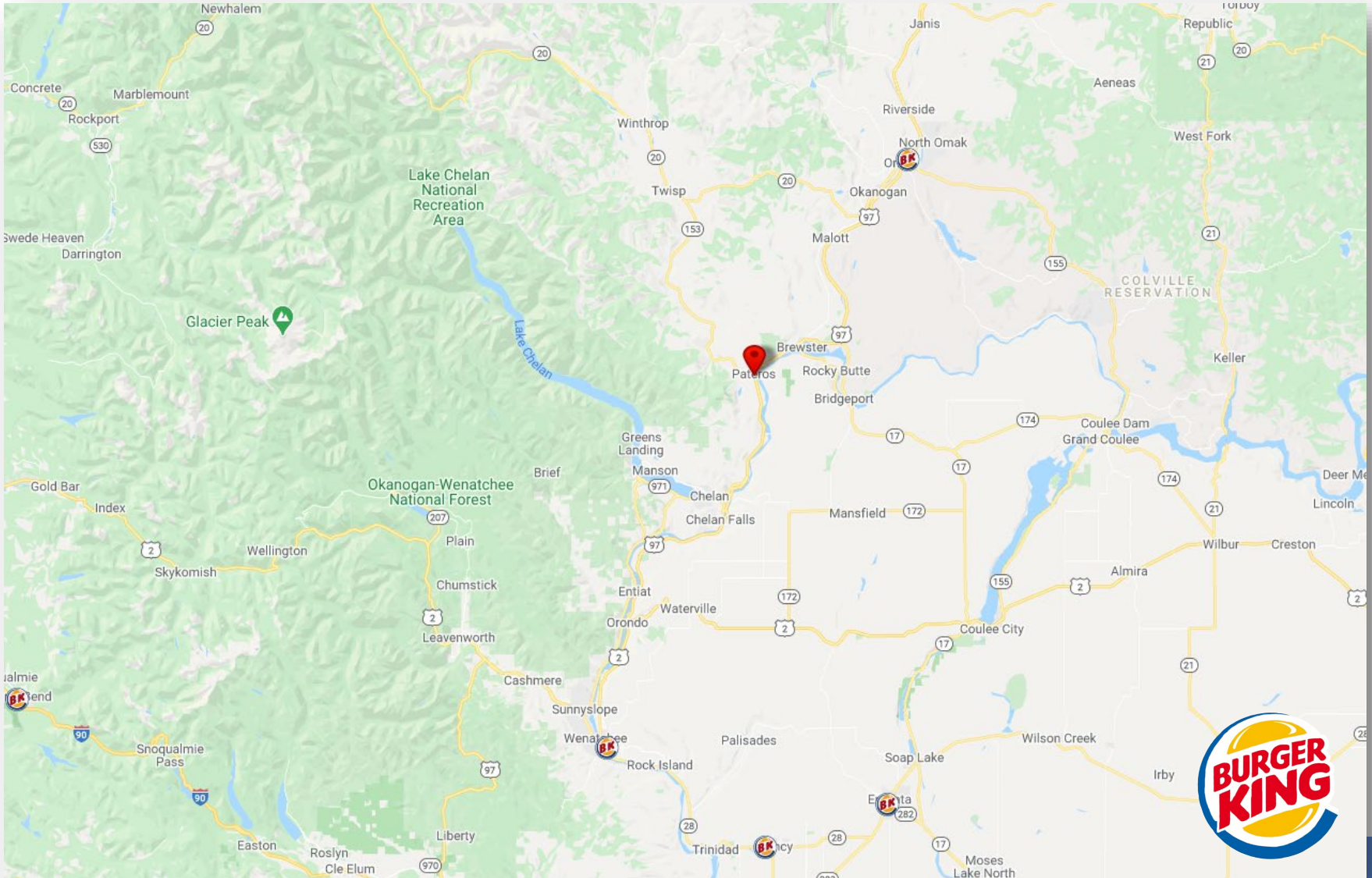
Anytime Fitness

| | |
|--|---|
| Category: | Health / Fitness / Nutrition |
| Demographic Requirement Radius Ring: | Varies |
| Demographic Requirement Minimum Population Requirement: | 5,000 |
| Facility Co-Tenants: | Prefers to be near big box retailers and national grocery chains. Grocery Anchored is preferred. Neighborhood retail centers with grocery stores, coffee shops, discount retailers and/or drug stores. |
| Demographic Comments: | 25-55 age bracket with expendable income. The Express Club is targeted for population centers of less than 5,000 people. |
| Number of Square Feet and/or Acres: | 3,000 SF |
| Comments on Desired Location: | Easy access for both ingress and egress, with signalized access preferred. hassle-free parking of just 4-5 cars per 1,000 SF. Neighborhood strip centers are the ideal setting for the co-ed centers. Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip |





Retail Prospects



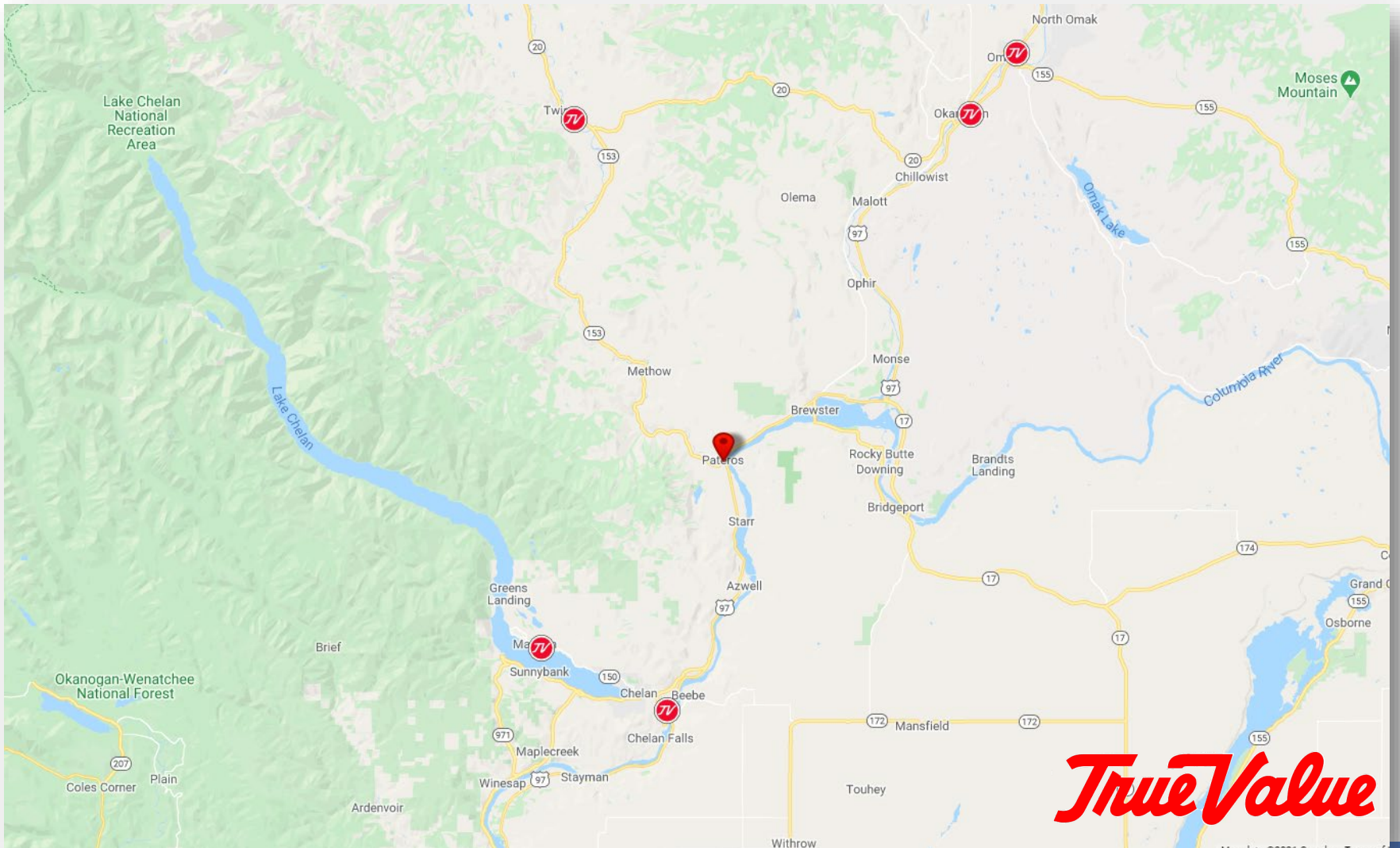
Burger King

| | |
|--|---|
| Category: | Fast Food |
| Demographic Requirement Radius Ring: | 1 |
| Demographic Requirement Minimum Population Requirement: | 30,000 |
| Traffic Count: | 25,000 VPD |
| Demographic Comments: | High traffic locations with good visibility and ease of ingress/egress. . |
| Number of Square Feet and/or Acres: | 1,800 - 2,500 SF |
| Comments on Desired Location: | High Visibility, High Access. Drive-thru. Corners, mall/shopping center out-parcels, freeway locations. Multi-concept (1,800 - 2,500 SF) with Gas & Oil, Retail, Other Food with Site Sharing, with 40-80 seats. Inline/Storefront requires 1000 - 3500 SF. E Downtown, Gas Station, Kiosk, Lifestyle Center, Medical Center, Neighborhood Strip, Outlet Mall, Power Center, Regional Mall, Regional Strip, Special Strip, Transit Terminal |





Retail Prospects



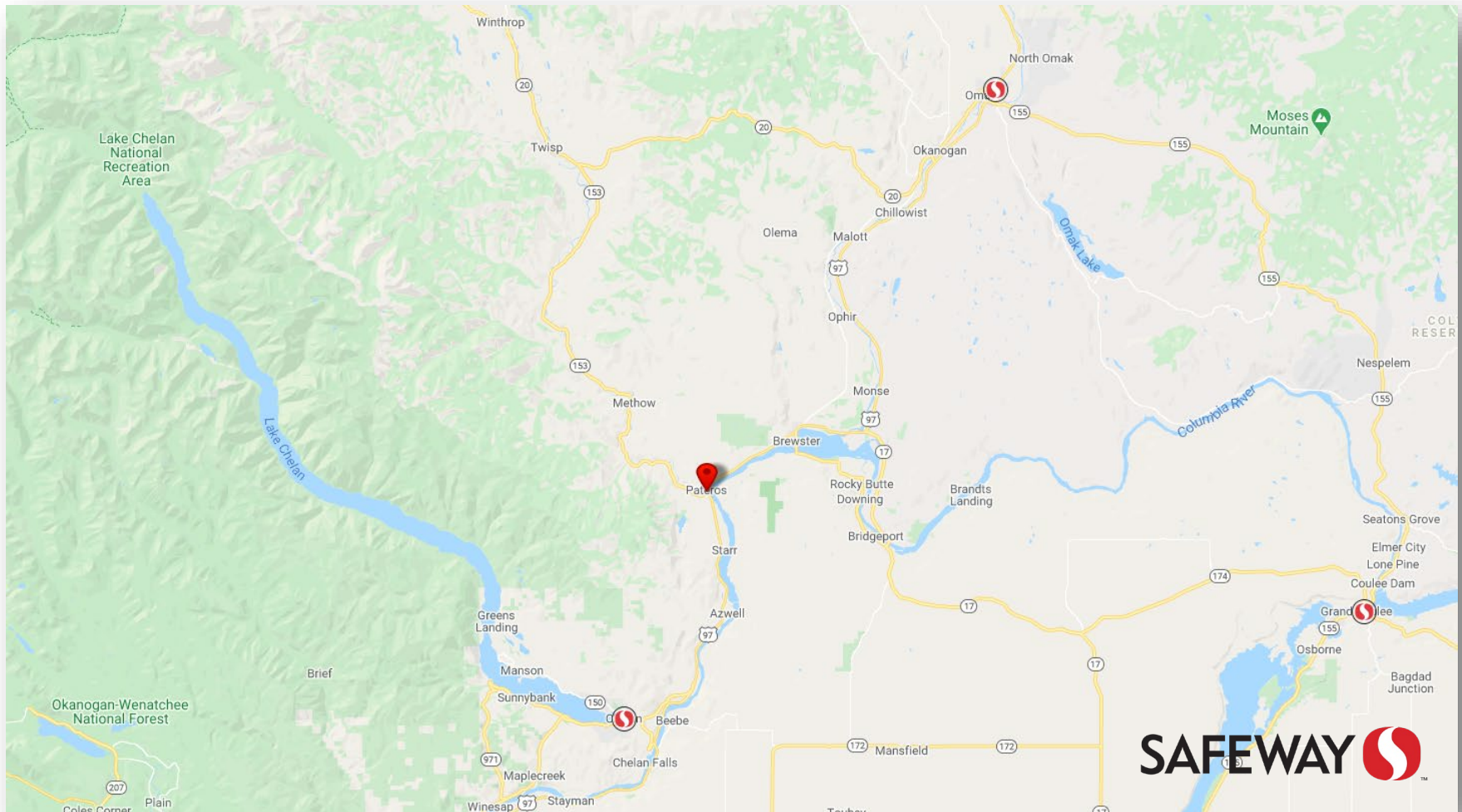
True Value

| | |
|---|--|
| Category: | Hardware Store |
| Demographic Requirement Radius Ring: | Varies |
| Number of Square Feet and/or Acres: | 10,000 SF |
| Comments on Desired Location: | Free Standing, Neighborhood Strip, Regional Strip, Special Strip |





Retail Prospects

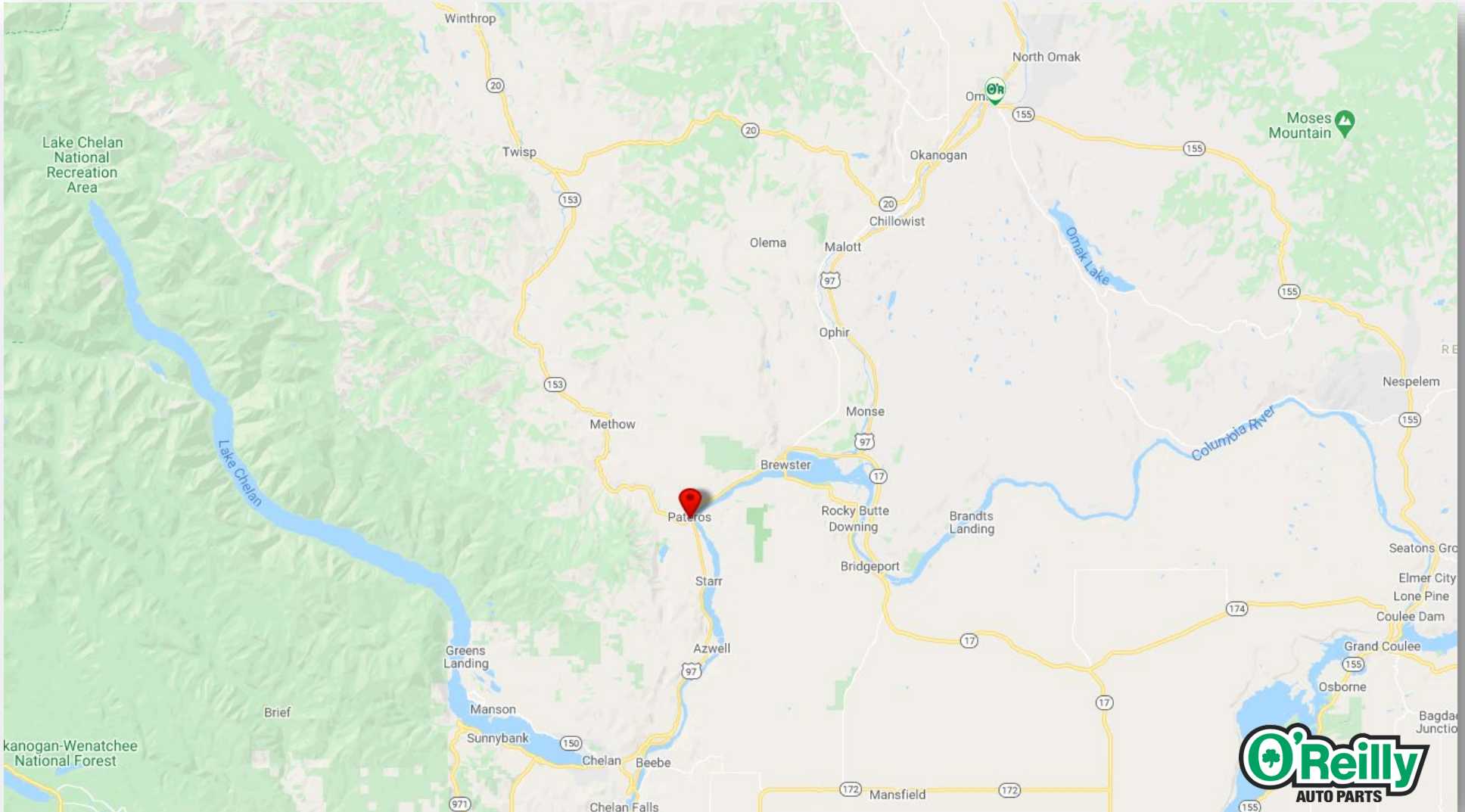


Safeway

| | |
|--|---|
| Category: | Supermarket, Grocery Store |
| Current Stores: | 1,326+ |
| Demographic Requirement Household Income Requirement: | Varies |
| Number of Square Feet and/or Acres: | 42,000 – 55,000 SF |
| Comments on Desired Location: | Free Standing, Lifestyle Center, Regional Strip. We develop stores in prominent urban and suburban locations. |



Retail Prospects



O'Reilly Auto Parts

Category: Auto Parts

**Demographic Requirement
Radius Ring:** Varies

Traffic Count: 30,000 VPD

Demographic Comments: Population: Dense areas w/ auto mechanic businesses.

Number of Square Feet and/or Acres: 6, 500 SF

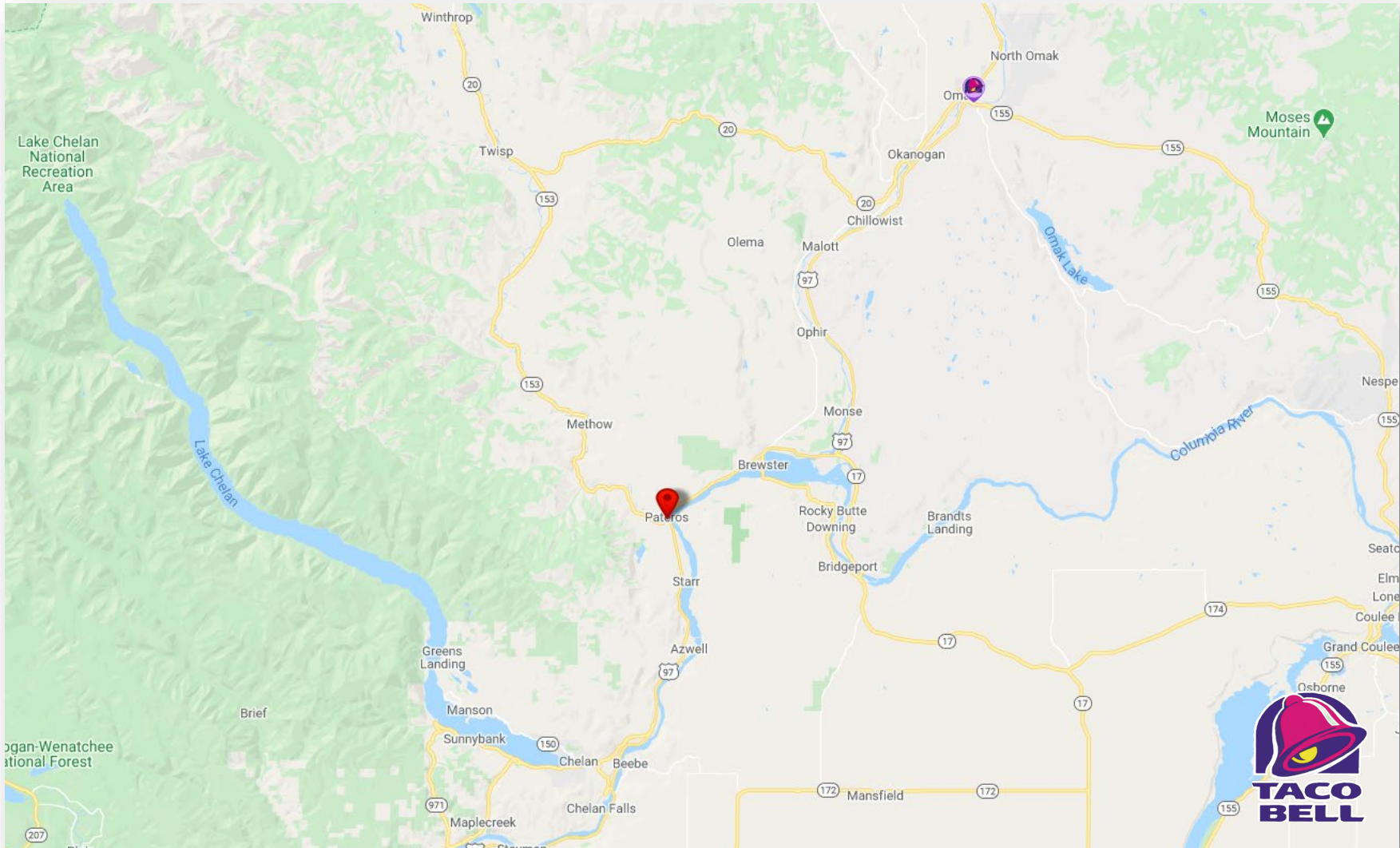
Comments on Desired Location: Store size: 7200sa (ideal) or .75-1.25 acres for Purchase & Sale. Type of Center: Out parcels w/ Direct Road Visibility. Prefer to purchase fee simple, but will consider Leases and Build to Suits in unique circumstances.

Facility Type: Free Standing, Neighborhood Strip, Regional Strip





Retail Prospects



Taco Bell

| | |
|--|--|
| Category: | Fast Food |
| Demographic Requirement Radius Ring: | 1 |
| Demographic Requirement Minimum Population Requirement: | 15,000 |
| Traffic Count: | 30,000 VPD |
| Demographic Comments: | Population: Freestanding: 15,000 in TA. |
| Number of Square Feet and/or Acres: | 1,900 SF |
| Comments on Desired Location: | Free standing with drive thru. Prefers site locations at corner of lighted intersections and shopping center outparcels with high visibility, prominence and easy accessibility. Purchase or ground lease with purchase option. Seating for 50 to 70. Minimum Free Standing, Lifestyle Center, Regional Strip, Special Strip |





Real Estate Analysis

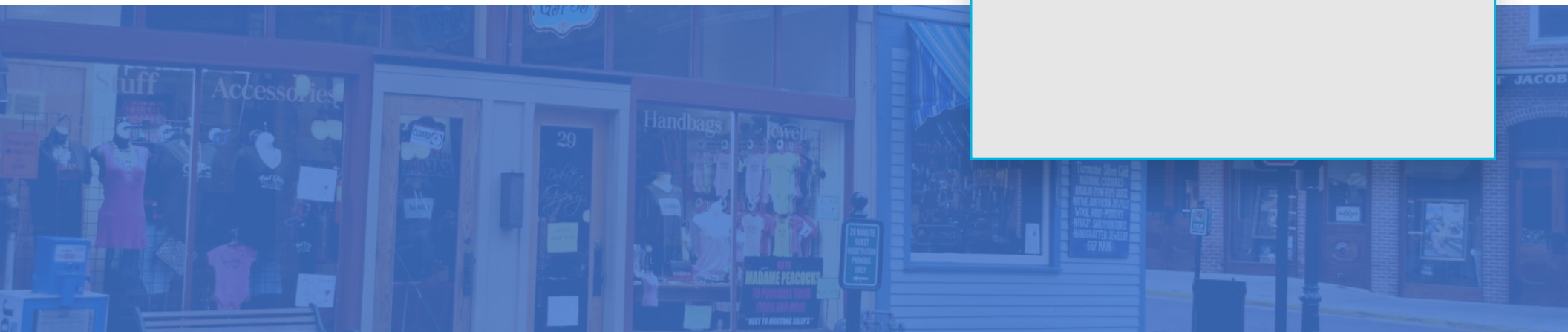
Real Estate Analysis

Purpose:

To identify and record the primary real estate opportunities within the market.

This analysis is performed by licensed real estate professionals.

Retail Academy professionals have reviewed the market's real estate to identify underexposed real estate assets. No retail expansion can take place without the right piece of real estate. The following slides describe the primary underexposed real estate sites and development zones in the market.



Focus Recruitment Zone Analysis



Focus Recruitment Zone Analysis - 1





retail academy

Thank you!



retail strategies .com

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PATEROS, WASHINGTON

Market Guide

www.pateros.com

City Contact Information



Jord Wilson, MLA & MBA
City Administrator

113 Lakeshore Drive
P.O. Box 8
Pateros, WA 98846

(o) 923-2571 (c) 449-9670

paterosparks@outlook.com

Demographics

(Custom Trade Area)



Population
5,949



Median Household Income
\$49,897



Growth Rate
2.04

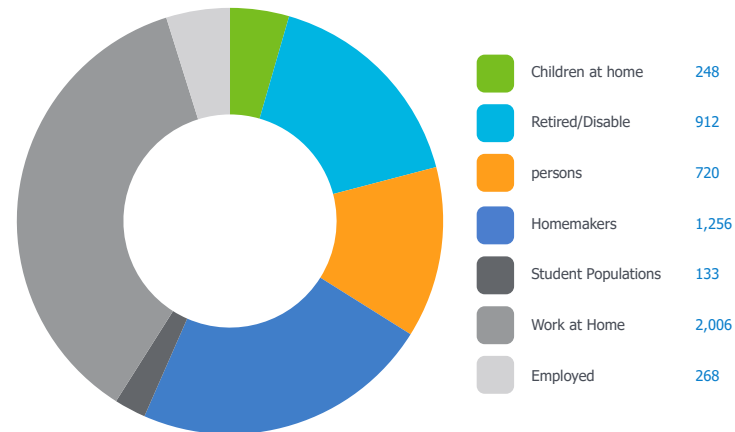
Peer Analysis

The Peer Analysis, built by Retail Strategies along with our analytics partner (Tetrad), identifies analogue retail nodes within a similar demographic and retail makeup. The Peer Analysis is derived from a 5 or 10 minute drive time from major comparable retail corridors throughout the country. The variables used are population, income, daytime population, market supply and gross leasable area. The following are retail areas that most resemble this core city:

Peer Trade Areas

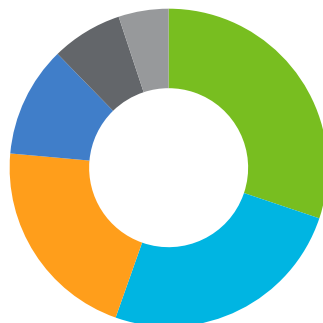
| | | |
|-------------|----|--------------------------|
| Mccleary | WA | 198 N Summit Rd |
| Yachats | OR | 935 Highway 101 N |
| Westport | WA | 315 S Montesano St |
| Brownsville | OR | 178 S Main St |
| Clatskanie | OR | 115 E Columbia River Hwy |
| Vader | WA | 1234 State Route 506 |

Daytime Population 5,543 (Custom Trade Area)



GAP Analysis \$39,499,413 (Custom Trade Area)

The Gap Analysis is a summary of the primary spending Gaps segmented by retail category. It measures actual consumer expenditures within the City's trade area and compares it to the potential retail revenue generated by retailers in the same area. The difference between the two numbers reflects leakages, or the degree to which consumers travel outside the community for certain retail goods and services. The Gap analysis is a useful tool to gauge retail supply and demand within the community.



| | |
|---|--------------|
| Foodservice and Drinking Places | \$11,914,009 |
| Grocery Stores | \$9,972,644 |
| General Merchandise Stores | \$8,301,877 |
| Health & Personal Care Stores | \$4,449,381 |
| Building Material and Garden Equipment Stores | \$2,852,060 |
| Furniture and Home Furnishings Stores | \$2,009,442 |

Focus Categories

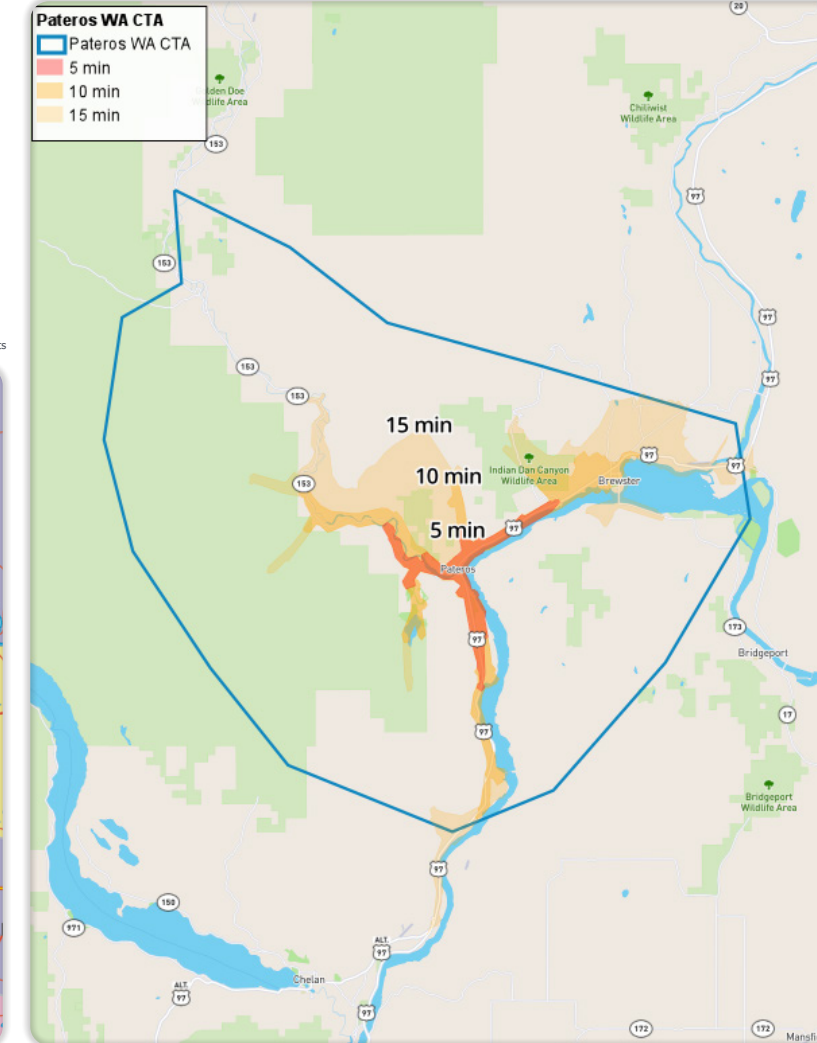
The top categories for focused growth in the municipality are pulled from a combination of leakage reports, peer analysis, retail trends and real estate intuition. Although these are the top categories, our efforts are inclusive beyond the defined list.

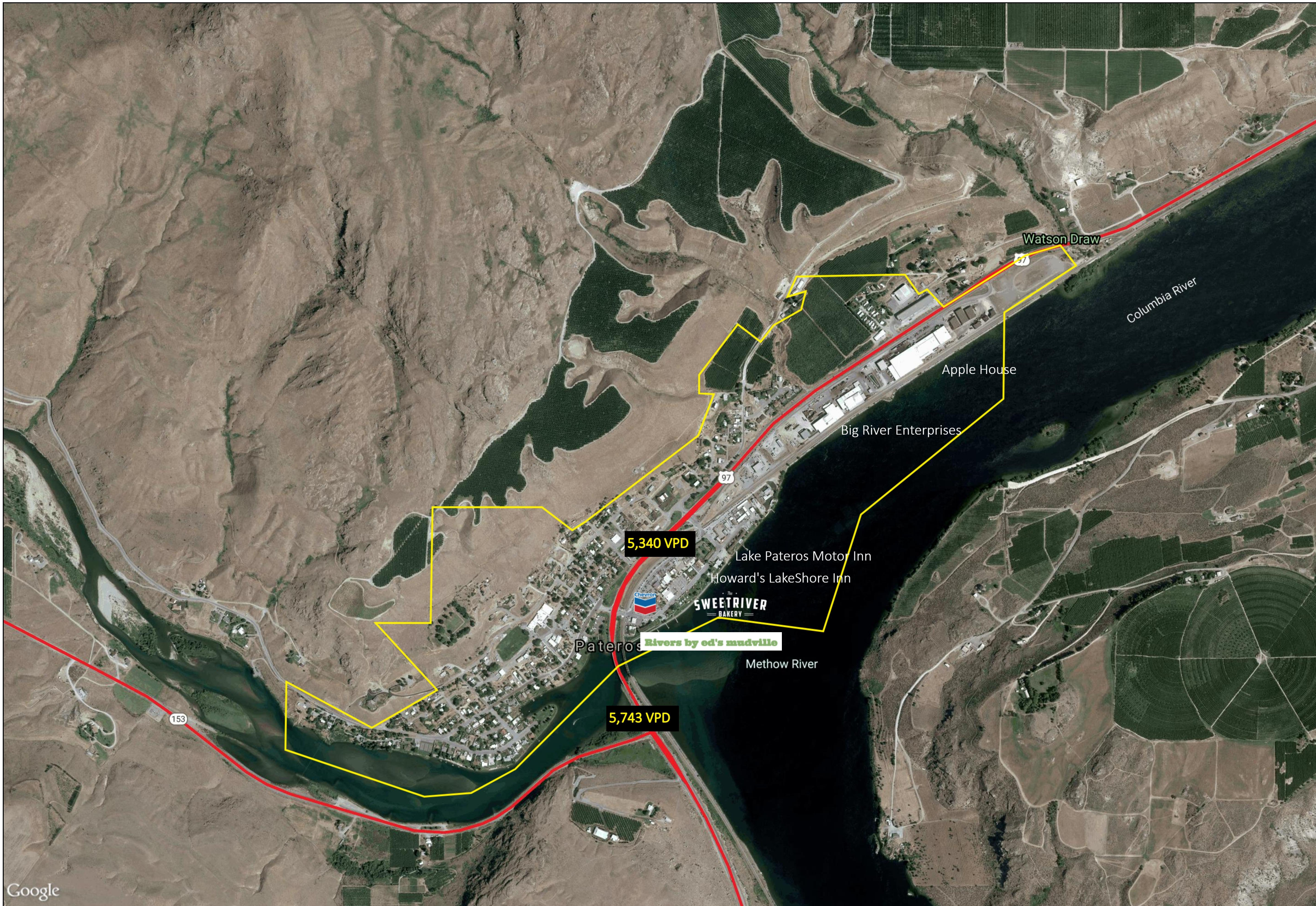
Let us know how we can help you find a site!



| | 3 Mile Radius | 5 Mile Radius | 10 Mile Radius |
|---------------------------|---------------|---------------|----------------|
| 2020 Estimated Population | 1,029 | 1,350 | 6,333 |
| Daytime Population | 1,286 | 1,555 | 5,754 |
| Median HH Income | \$55,270 | \$53,898 | \$50,320 |
| Number of Households | 372 | 486 | 2,068 |

| | 5 Minute DT | 10 Minute DT | 15 Minute DT |
|---------------------------|-------------|--------------|--------------|
| 2020 Estimated Population | 855 | 2,350 | 4,377 |
| Daytime Population | 849 | 3,272 | 4,485 |
| Median HH Income | \$54,987 | \$49,990 | \$49,475 |
| Number of Households | 293 | 773 | 1,390 |





PATEROS, WASHINGTON

Major Retail & Restaurants