Culver Grocery Feasibility Study

Market Feasibility Results

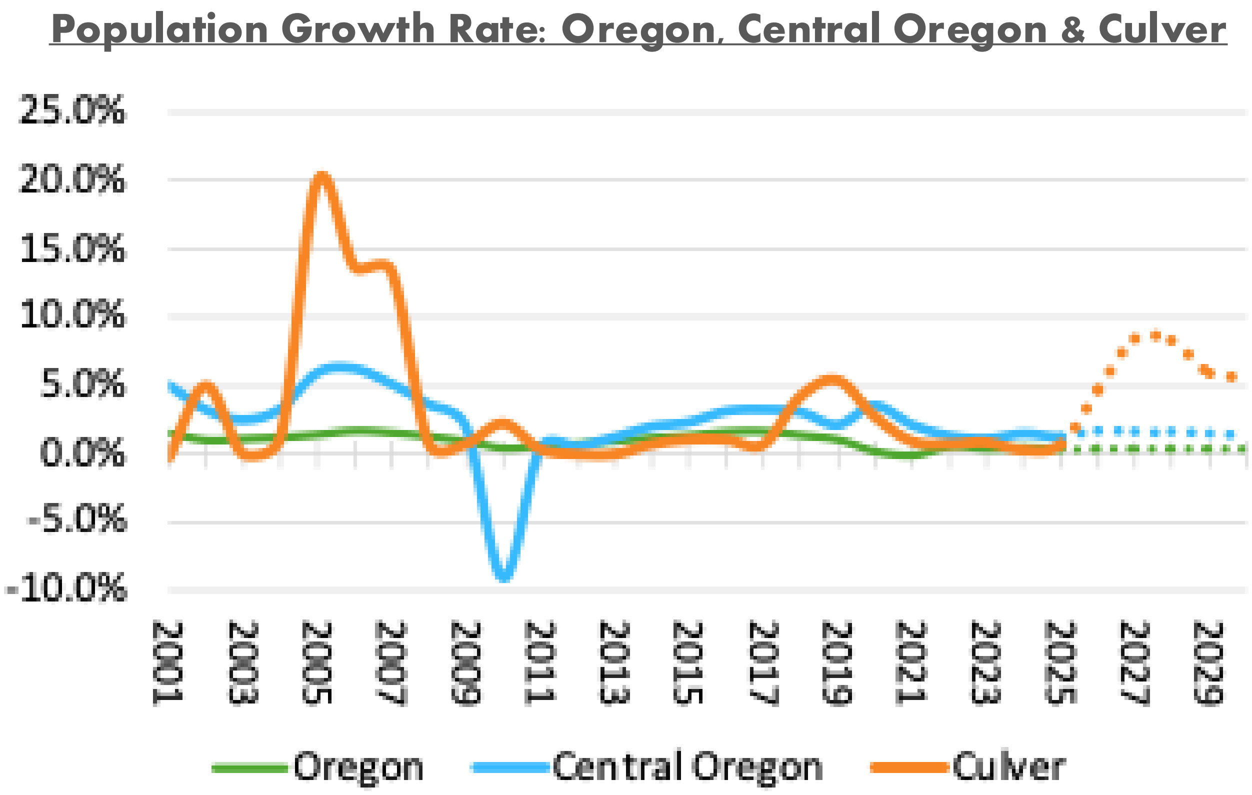
Presentation to Culver City Council and Jefferson County Board of Commissioners

September 14, 2026

CULVER

Population
Households
Income

- Since the mid-2000s, population has grown at ~3% per year
- In 2000 - 802 residents, in 2010 - 1,365 residents and in 2020 - 1,600 residents
- With normal growth & Haystack Butte housing development, population in 2030 estimated nearly 2,300 residents



Culver information presented here is for the City of Culver.
Source: Portland State University, Population Research Center, COMPETINOMICS

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Population Households Income

- 700 households within city limits & largest average household size of 3.28 people per household among cities in Central Oregon
- High number of family households
- Young population - more than 90% of Culver's population is under age 65

Culver Households Compared to Central Oregon

	Size	Total Households		Growth Rates		Families	Households
	2024	2019	2024	10-year	5-year	2024	% Families
Oregon	2.42	1,611,982	1,718,422	1.2%	1.3%	1,059,526	61.7%
Central Oregon	2.44	92,079	104,529	2.5%	2.6%	69,413	66.4%
Jefferson County	2.73	8,094	8,814	1.2%	1.7%	6,384	72.4%
Culver	**3.28**	**533**	**684**	**2.7%**	**5.1%**	**505**	**73.8%**
Madras	2.91	2,456	2,583	0.9%	1.0%	1,794	69.5%
Metolius	2.83	302	402	3.2%	5.9%	275	68.4%

Culver information presented here is for the City of Culver.
Source: U.S. Census Bureau American Community Survey, 5-Year Tables

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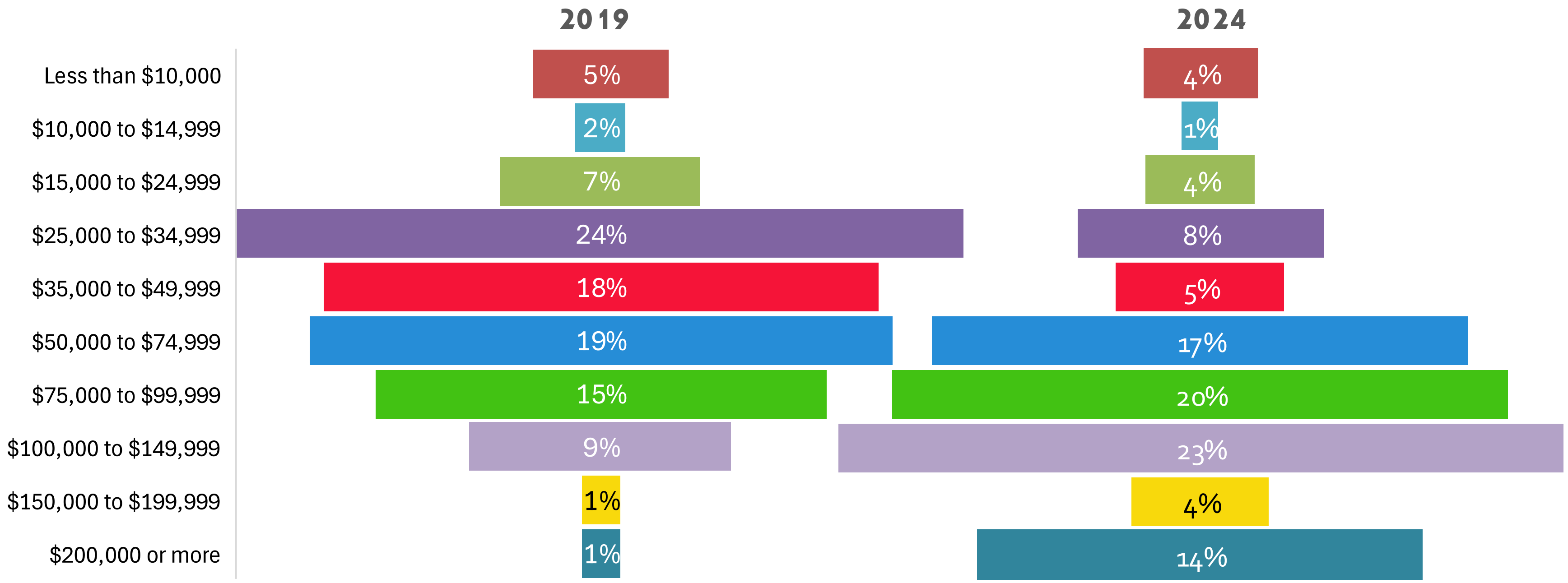
Population Households Income

- Median household income: 2019 - $46,477 & 2024 - $91,463
- 2024 - 130 *fewer* households with incomes below $50,000, 280 *more* households with incomes above $50,000 (225 more households with incomes above $100,000)
- Greater household income indicating more residents have more money to spend locally on consumer and retail purchases

Culver Households by Household Income, 2019-2024



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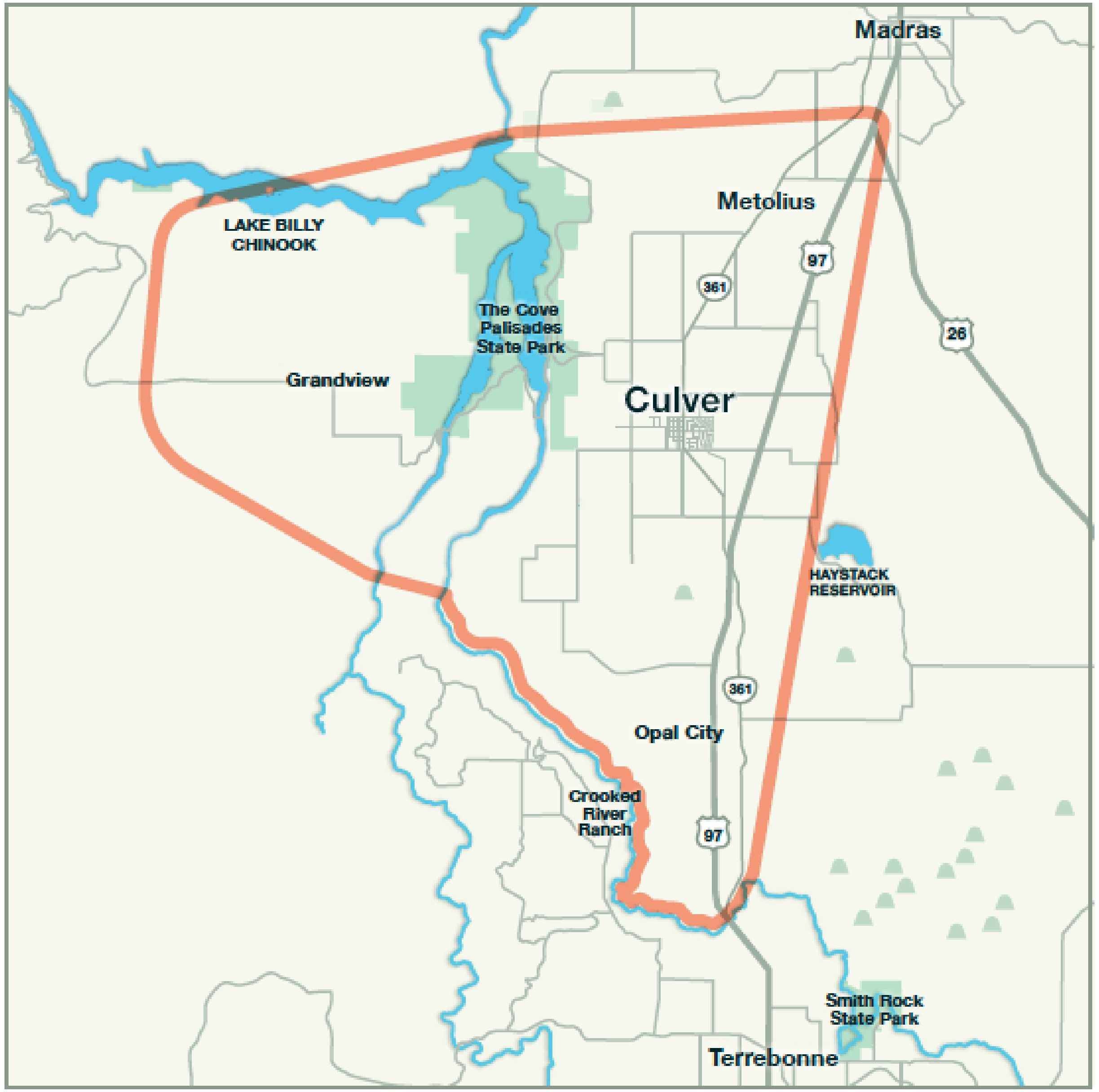
Trade Area



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Estimated Trade Area Spending

- Trade area household expenditures includes a percentage of visitor spending - estimated $14 million at grocery stores in Jefferson County in 2025
- Other trade area assumptions include:
  - 5% vacancy rate
  - 25% of homes are second homes or vacation rentals (not full-year residents)
  - 50% capture rate for trade area households living in Metolius given proximity to Madras

Trade Area & Jefferson County Household Spending Estimates

Culver Trade Area	2025	2030	Jefferson County	2025	2030
Population	5,117	6,694	Population	25,768	27,294
Households	1,882	2,462	Households	9,439	9,998
Average Household Size	3.27	3.24	Average Household Size	2.73	2.70
Housing Units	1,976	2,585	Housing Units	10,602	11,497
Owner occupied	81%	84%	Owner occupied	72.0%	76.2%
One-Unit Structures	81%	85%	One-Unit Structures	73.3%	76.2%
Median Household Income	$94,590	$111,904	Median Household Income	$78,334	$89,581
Average Household Income	$106,025	$134,580	Average Household Income	$95,747	$110,193
Household Expenditures	$117,514,614	$175,421,794	Household Expenditures	$518,229,095	$626,359,548
Household Expenditures at Food Stores	$11,243,404	$16,629,838	Household Expenditures at Food Stores	$46,766,140	$57,129,950

Source: U.S. Census Bureau, U.S. Dept. of Labor, U.S. Bureau of Economic Analysis, Jefferson County, Local Interviews, COMPETINOMICS. Note: Trade area Expenditures on Food at Home includes an estimate of Visitor Spending.

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Where Residents Shop for Groceries

Grocery Landscape

- Culver grocery store options include:
  - Dollar General
  - Culver Market
  - Bulldog Pitstop & Feed
- Residents travel to Madras, Terrebonne, Redmond and/or Bend
- Culver is the only city of its size in Oregon without a full-service grocery store

Survey Results
Top Ten Grocery Stores

- Safeway in Madras, Redmond & Bend
- Walmart in Redmond
- Costco in Bend
- Fred Meyer in Redmond
- Grocery Outlet in Madras
- Oliver Lemons in Terrebonne
- Winco in Bend
- Trader Joe's in Bend
- BiMart in Madras
- Culver Market & Gas Station

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Consumer Habits & Spending Survey

"I have been waiting for a grocery store in Culver since we moved here! Not having a 15-30 minute drive for groceries would be amazing even if some prices were higher."

"If overpriced I would likely only buy the bare minimum. If the quality is superior, I will support local even if I have to pay a higher price."

"The convenience of shopping in Culver would offset the travel expense. The cost to Madras and back is about $5.00 to $6.00 x 4-5 times a month."

"Quality of ingredients, especially fresh products like produce and milk will be important. I don't want to pay more for poor quality. I'll continue to fit grocery shopping around trips to Madras or Redmond if that is the case."

"I would love the convenience and would buy a few items but would have to consider price when shopping for a large family."

"If there was a grocery store in Culver, where I could get a reasonable portion of my grocery list covered, I'd ideally love it to pieces! Yes, I'd be more than willing to pay additional fair prices. Been here 45 years and frankly been wasting time, gas and money being forced to shop in Madras or Redmond for groceries. Right now? We really don't have much choice, do we?!"

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Market Feasibility Findings

Market feasibility analysis indicates that Culver could support a new grocery store.

1 Estimated Spending at Grocery Stores: 2025 - $11.2 million & 2030 - $16.6 million

2 Store Size: 5,000 to 10,000 square feet

3 Product Mix: High-quality basics at competitive prices alongside local demand-driven product offering, possibly differentiated from local competitors

4 Site Requirements: Parking for staff and customers, loading space for deliveries, debris storage areas, power and water requirements.

5 **Development feasibility analysis implies that lack of real estate options may be a barrier to entry.**

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Market Feasibility Findings

Findings

- **Market demand** from residents and visitors to Lake Billy Chinook
- Sufficient candidate pool of potential grocery operators in Central Oregon
- ***Challenge is one of business recruitment and real estate***
- Business recruitment can help fill a tenable space, but Culver lacks move-in-ready spaces - startup costs too high

Next Steps

- Business recruitment campaign
- Real estate challenge is common among small, rural cities
  - Known resources and strategies that could create incentives for development
  - Public investment makes sense **when** public investment of tax dollars sufficiently leverages private investment, moves the private sector to action and outweighs the local tax burden