



# APPENDIX A

## ECONOMIC DEVELOPMENT PROFILE

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## **INTRODUCTION**

This Economic Development Profile presents a summary of demographic, economic, and market analysis done to understand Newcastle's position in the region. The work has been done to inform an Advisory Committee's consideration of the potential for redevelopment in Downtown Newcastle. The early sections of this document summarize community demographics as general context, while later sections delve into the employment and retail makeup of the community, as well as the potential for additional development.

The Profile includes a selection of other communities to provide a basis of comparison when considering Newcastle. The communities chosen for comparison fall into three categories:

### **Neighbors**

- Bellevue
- Renton
- Issaquah

### **Peers**

These are cities of approximately the same population base plus some similar characteristics to Newcastle, such as being located along a high traffic corridor that connects neighboring cities. As shown on the next page, Kenmore, Maple Valley, Mill Creek, and Sammamish are somewhat larger than Newcastle in terms of population.

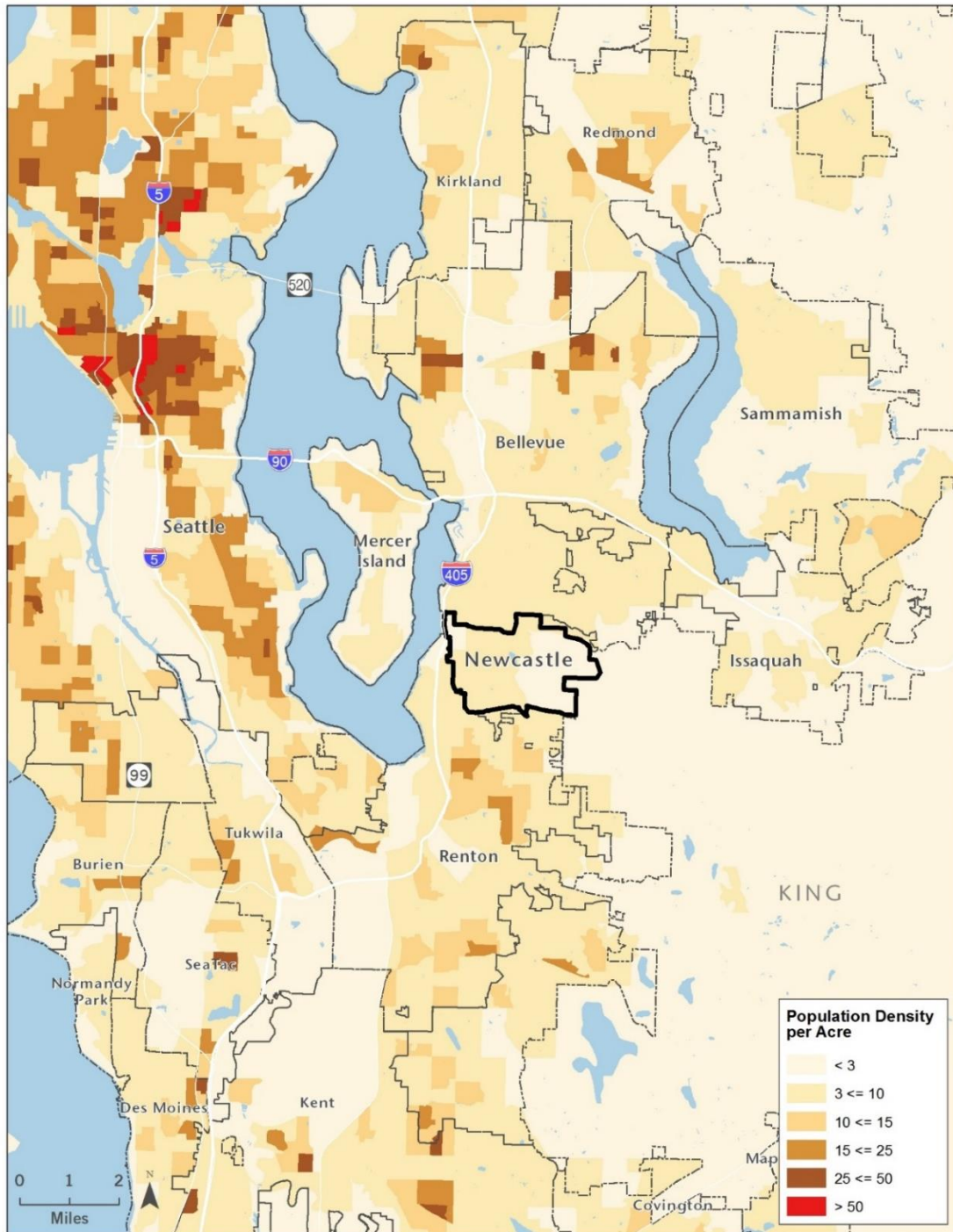
- Lake Forest Park
- Woodinville
- Kenmore
- Maple Valley
- Mill Creek
- Sammamish

### **Regional Benchmark**

- King County

## GEOGRAPHIC CONTEXT

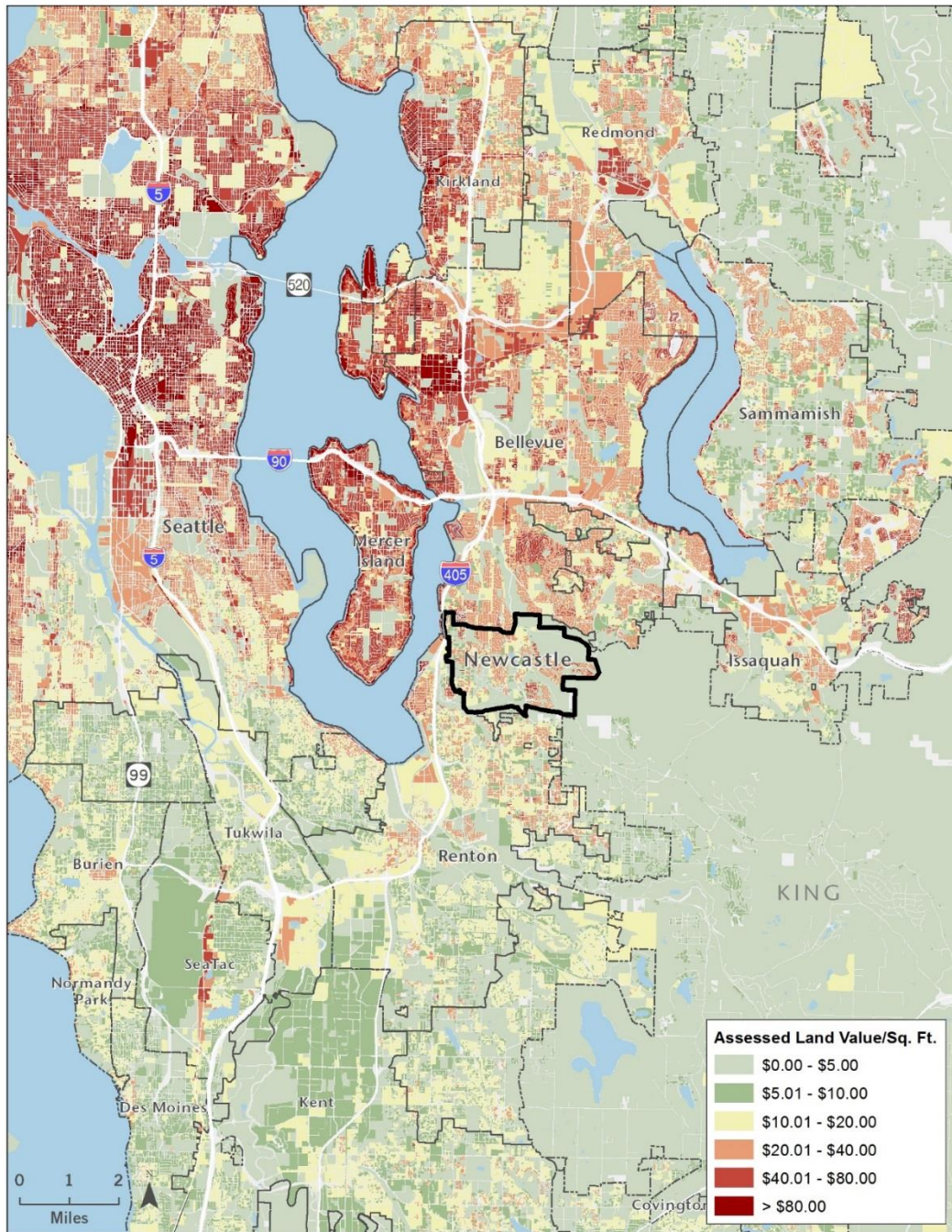
Exhibit 1. Population Density - US Census Block Groups, 2015



Source: Office of Financial Management (OFM), 2015

- Newcastle's population density is on the lower end of the density scale for communities located in the nearby region (<3 people per acre).
- Newcastle is situated between larger and denser population centers to the north (Bellevue, Crossroads) and to the south (Renton, Renton Highlands).

**Exhibit 2. Assessed Land Values by Square Feet, 2015**



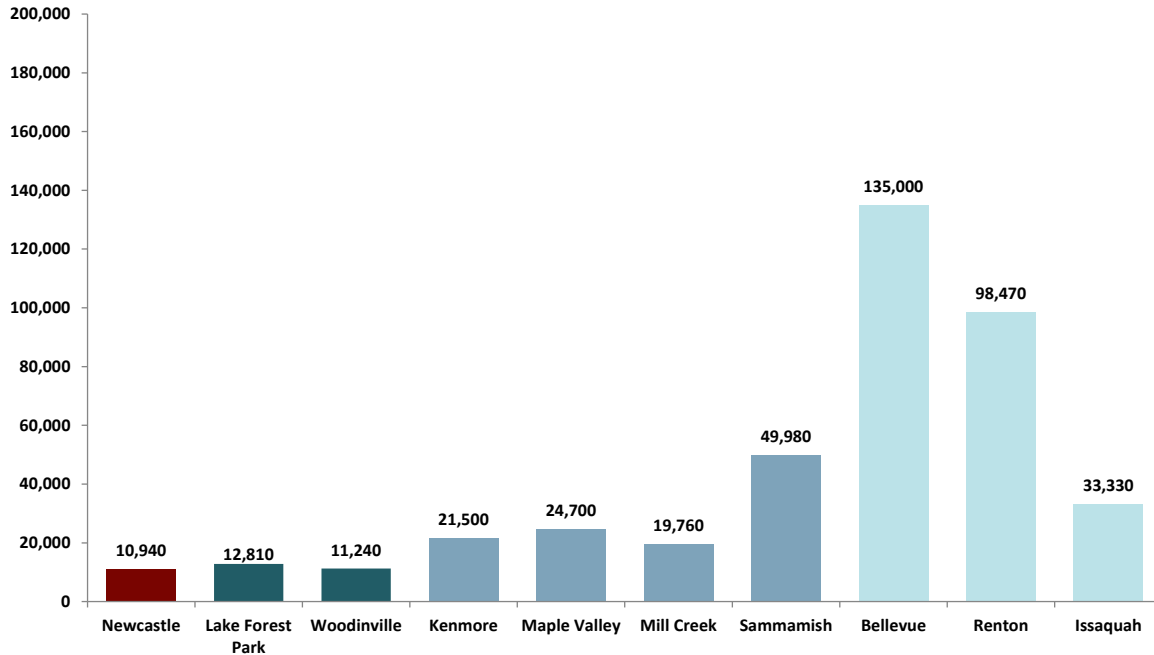
Source: King County Assessor, 2015

- Newcastle sits at the periphery of high land values within Central Puget Sound offering potential opportunities for businesses to pursue new development outside more expensive locations on the Eastside (e.g. Bellevue, Mercer Island, Kirkland, downtown Redmond).

## DEMOGRAPHICS

### Population

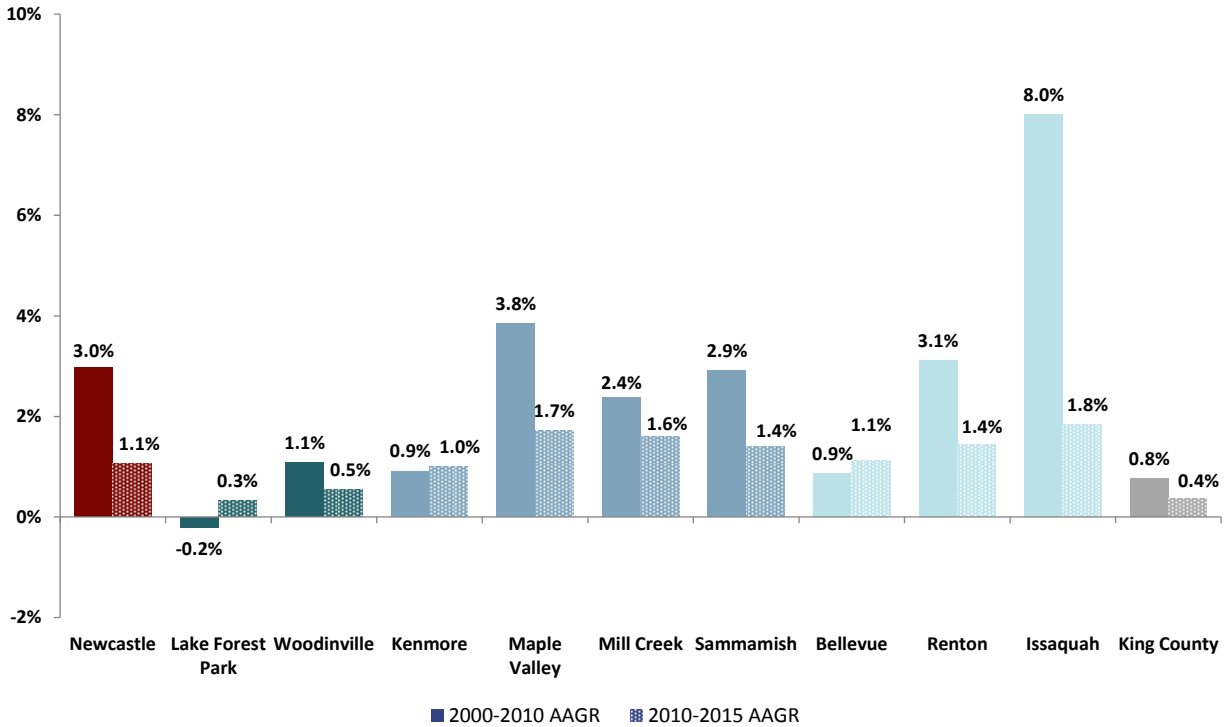
Exhibit 3. Estimated Population, 2015



Source: Washington State Office of Financial Managements (OFM), 2015; BERK, 2015

- In 2015, Newcastle had a population estimate of 10,940 making it the 25<sup>th</sup> largest city by population within King County, below Enumclaw (11,140) and above Duvall (7,245).
- In comparison to its larger neighbors, Newcastle's population represents roughly 8%, 11%, and 33% the size of Bellevue's, Renton's, and Issaquah's populations respectively.
- When viewed against the combined population of its largest neighbors (Bellevue, Renton, and Issaquah), Newcastle represents roughly 4% of the area's incorporated population.
- In 2015, King County had a population estimate of 2,052,800.

**Exhibit 4. Average Annual Growth 2000 to 2010 and 2010 to 2015  
(Excludes Annexations)**

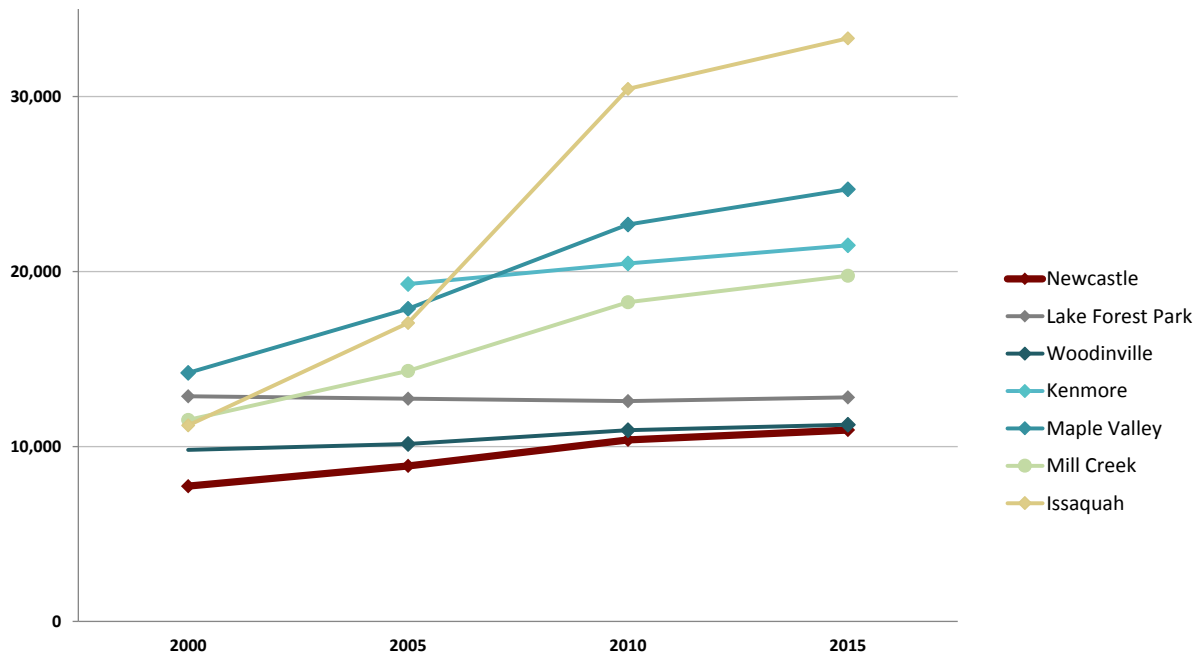


Source: Washington OFM, 2010 and 2015; BERK, 2015

- Newcastle had an average annual growth rate from 2000-2010 of 3.0%, and an average annual growth rate of 1.1% from 2010-2015. These growth rates are roughly equivalent to its larger neighbor Renton to the south and higher than the average annual growth rate of its largest neighbor to the north, Bellevue and higher than King County as a whole.
- Newcastle’s growth rates between before and after 2010 reflect the overall trend observed across its peers and neighbors – namely, growth rates declined significantly after 2010.
- Among its peers and neighbors, Issaquah experienced the largest growth rates across the measured time periods.
- Growth rates shown above exclude population growth related to annexations.



**Exhibit 5. Total Population, 2000-2015**



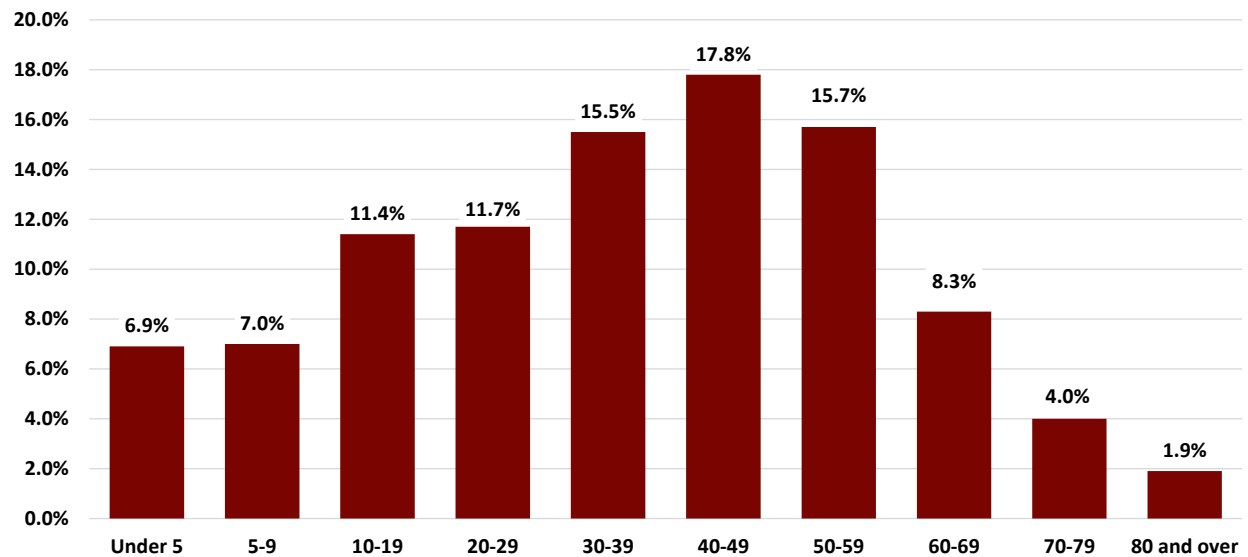
Note: Includes annexations.

Source: Washington OFM, 2000-2015; BERK, 2015

- From 2000 to 2015, Newcastle's population grew from 7,737 to 10,940.

## Age

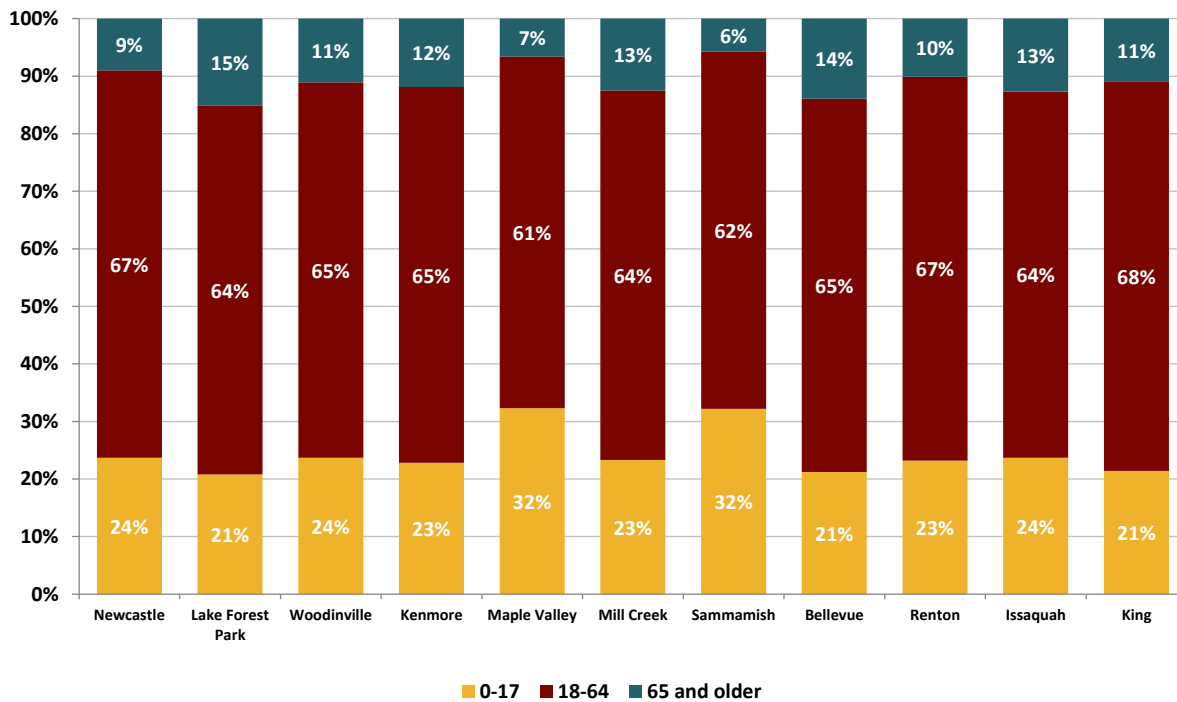
**Exhibit 6. Newcastle: Age Distribution by Age Category, 2010**



Source: United States Census, 2010; BERK, 2015

- In 2010, approximately 67% of Newcastle's population was between 18-64 years of age and 24% are under 18 years old.
- Overall, Newcastle's population is skewed toward the younger end of the population spectrum.

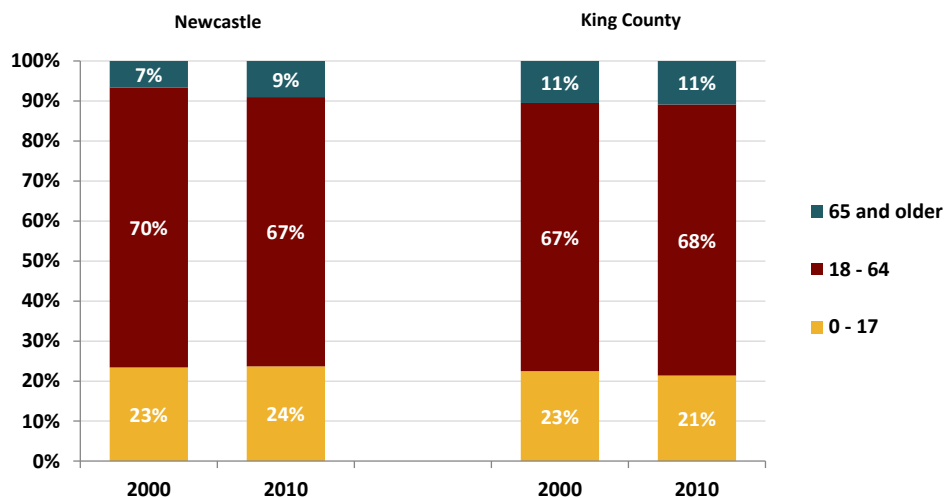
**Exhibit 7. Percent of Total Population by Age Category, 2010**



Source: United States Census, 2010; BERK, 2015

- Newcastle’s population trends younger than King County as a whole.
- Newcastle has a lower percentage of senior citizens (9%) compared to its larger neighbors of Bellevue (14%), Renton (10%), and Issaquah (13%).

**Exhibit 8. Newcastle and King County: Age Distribution Over Time, 2000 and 2010**

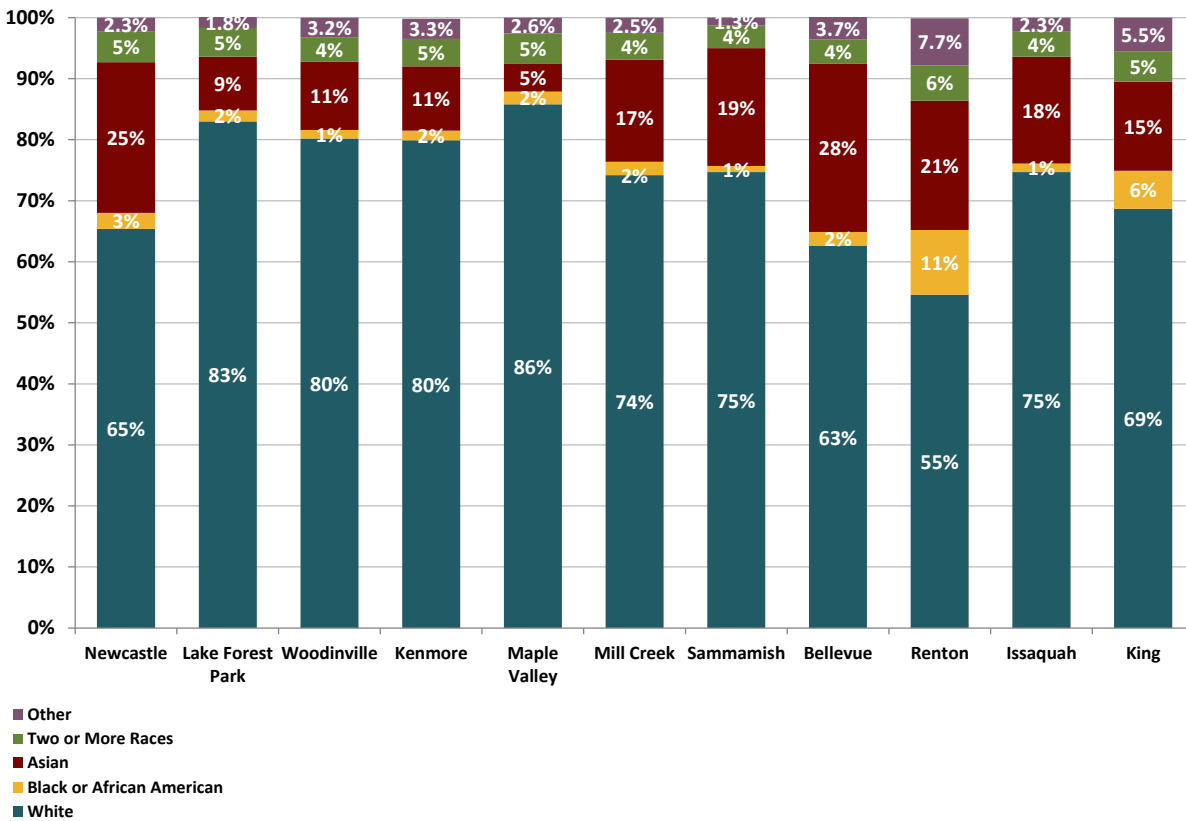


Source: United States Census, 2000 and 2010; BERK, 2015

- The percentage of Newcastle residents between the ages of 18-64 decreased slightly from 70% to 67% between 2000 and 2010. This runs slightly counter to the trend for King County as a whole.
- Although Newcastle’s current population trends younger than King County overall, it did experience a slight increase in the share of residents aged 65+ between 2000 and 2010 – from 7% to 9%.

## Race

**Exhibit 9. Percentage of Total Population by Race Category, 2010**

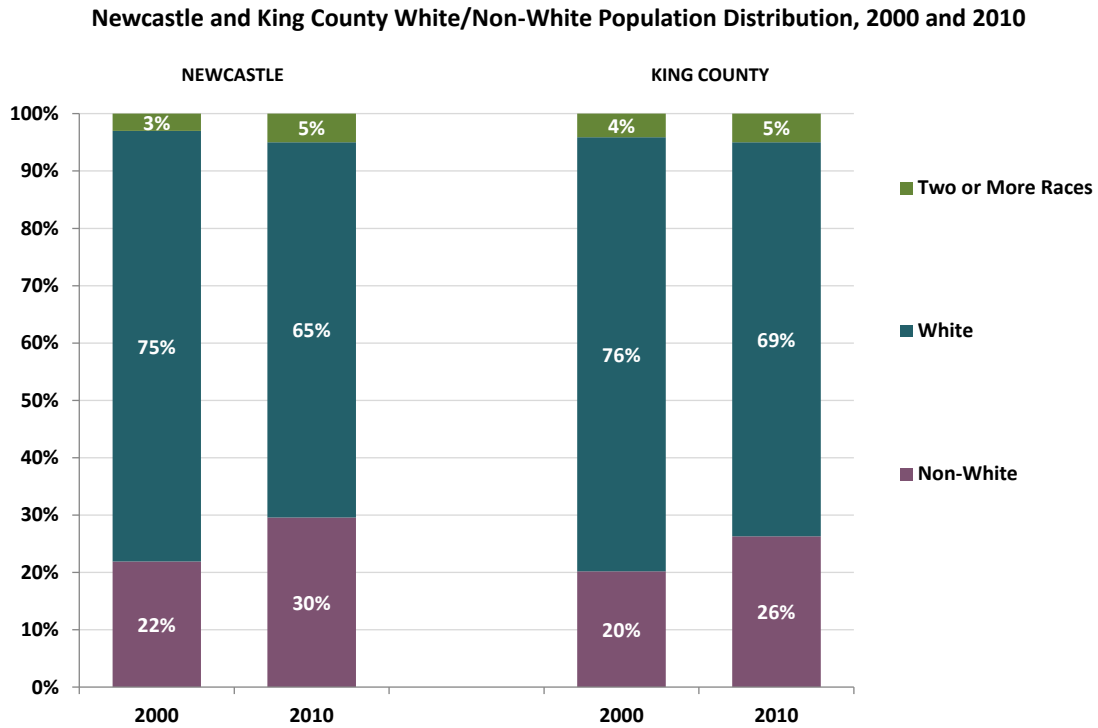


Note: Other includes American Indian or Alaskan Native, Native Hawaiian or Pacific Islander and Other Race.

Source: United States Census, 2010; BERK, 2015

- Newcastle has a higher non-white population percentage than many of its peer cities, including Lake Forest Park, Woodinville, and Kenmore. However, in comparison to its neighbors, Bellevue and Renton, Newcastle has a lower non-white population percentage, at 35%, compared to Bellevue's 37% and Renton's 45%.
- 65% of Newcastle residents are White, 25% of Newcastle residents are Asian, 5% of Newcastle residents are Two or More Races, 3% of Newcastle residents are Black or African American, and 2.3% of Newcastle residents are Other Race.

### Exhibit 10. Newcastle and King County: Change in Racial Composition, 2000 and 2010



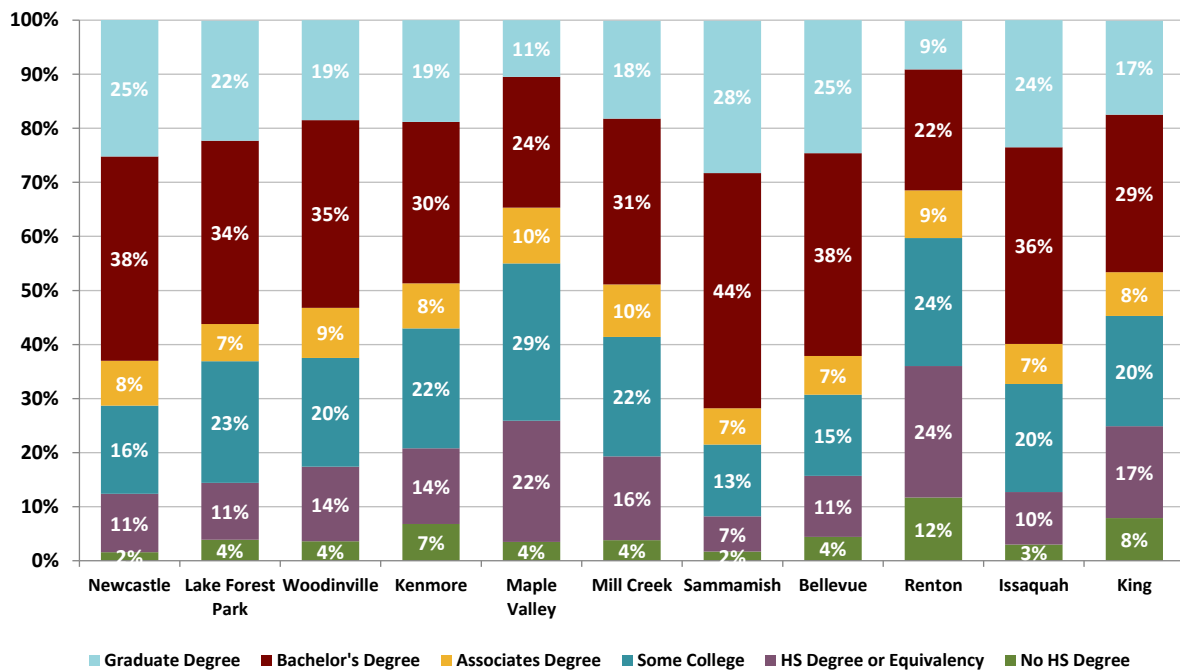
Source: 2000 Census and 2010 Census

Source: United States Census, 2000 and 2010; BERK, 2015.

- Newcastle's non-White population has increased from 22% to 30% between 2000 and 2010. This is a greater percentage increase than seen county-wide

## Educational Attainment

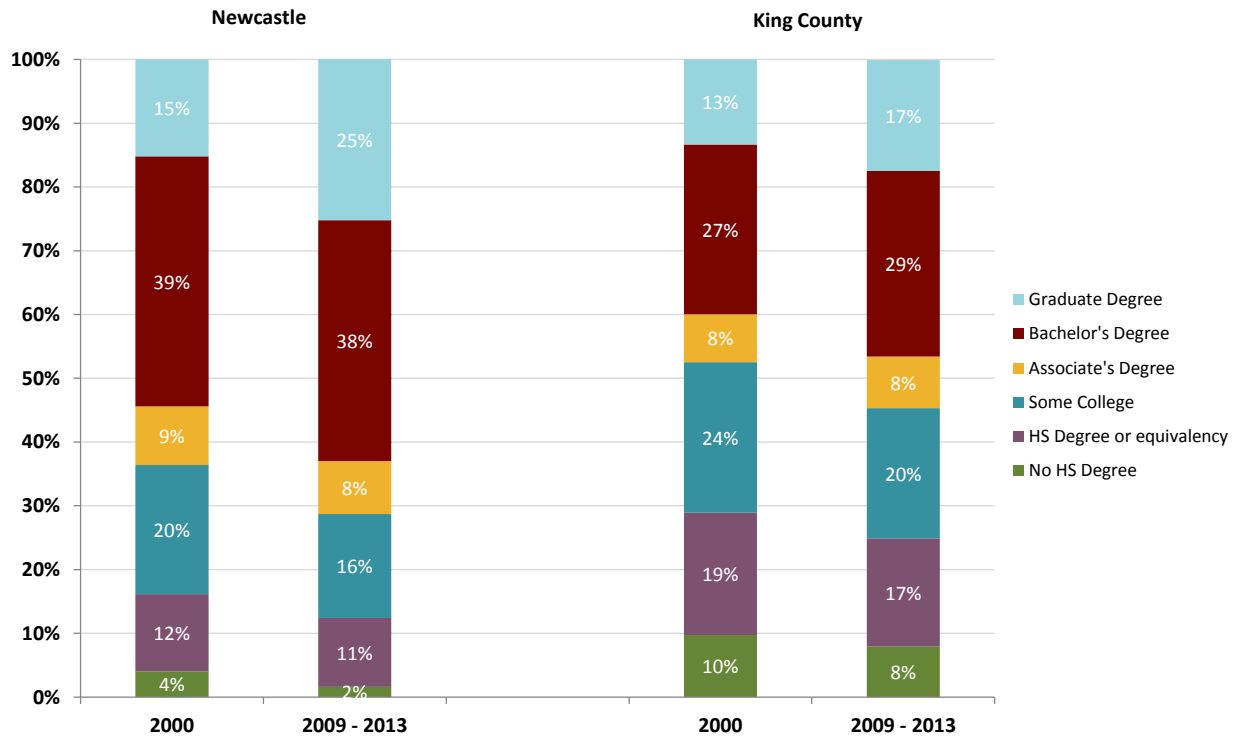
**Exhibit 11. Highest Educational Attainment for Population 25 and Older, 2009-2013**



Source: United States Census, American Community Survey 5-Year Estimates 2009-2013; BERK, 2015

- Newcastle's population is as well-educated and more college-educated than its neighbors and King County's populations as a whole. 38% of Newcastle residents have bachelors' degrees, and 25% have masters' degrees. The same percentages apply to Bellevue, but Newcastle is more educated than Renton and King County as a whole, and most of its peers.

### Exhibit 12. Newcastle and King County Highest Educational Attainment 2000 Compared to 2009-2013

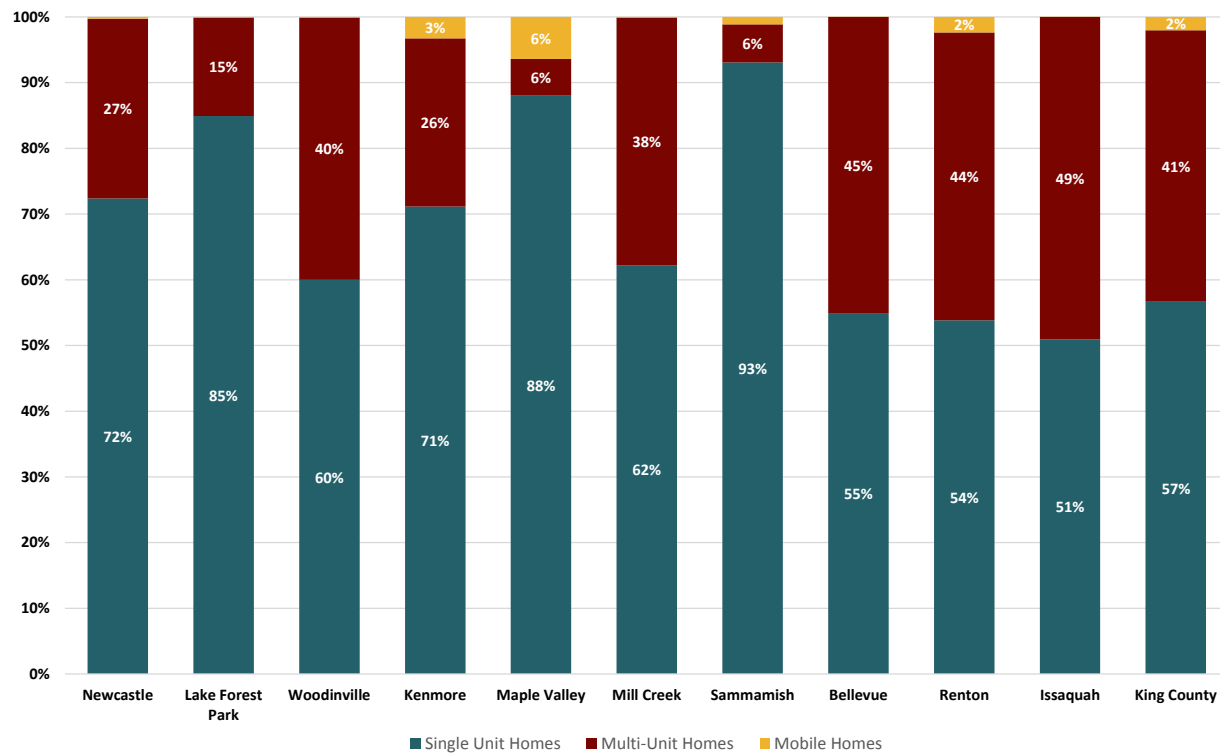


Source: United States Census, 2000; United States Census, American Community Survey 5-Year Estimates, 2009-2013

- The combined percentage of Newcastle residents with a Bachelors' or graduate degree increased from 54% to 63% between 2000 and 2013. This growth in college educated population mirrors a similar trend county-wide

## HOUSING

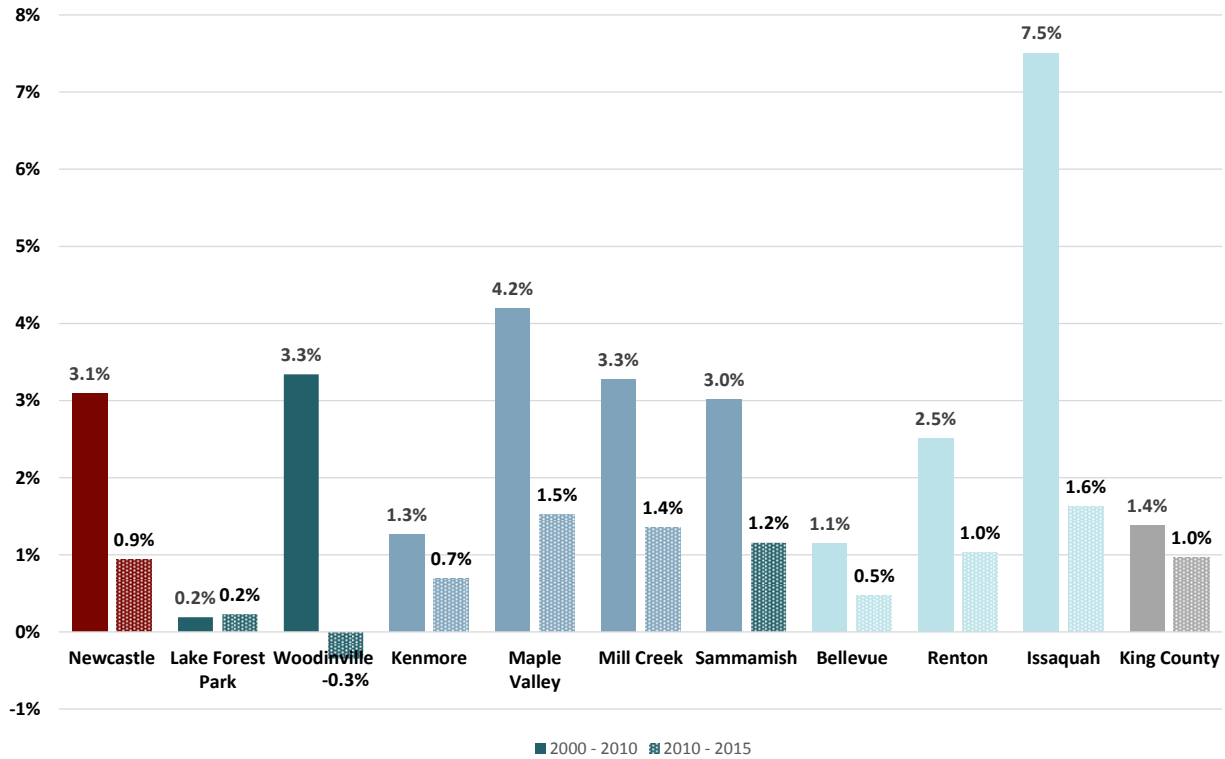
**Exhibit 13. Housing Units by Type, 2015**



Source: Washington State OFM, 2015; BERK, 2015

- Newcastle has a higher percentage of single-unit homes than most of its neighbors and King County as a whole, with 72% single-unit housing. In comparison, 55% of Bellevue housing is single-unit housing, 54% of Renton housing is single-unit housing, 51% of Issaquah housing is single-unit housing, and 57% of King County is single-unit housing.
- In 2015, 72% of housing units in Newcastle are detached single-unit homes, and 27% of housing in Newcastle is multi-unit homes.

**Exhibit 14. Housing Units Average Annual Growth Rates, 2000-2010 and 2010-2015  
(Annexations Excluded)**



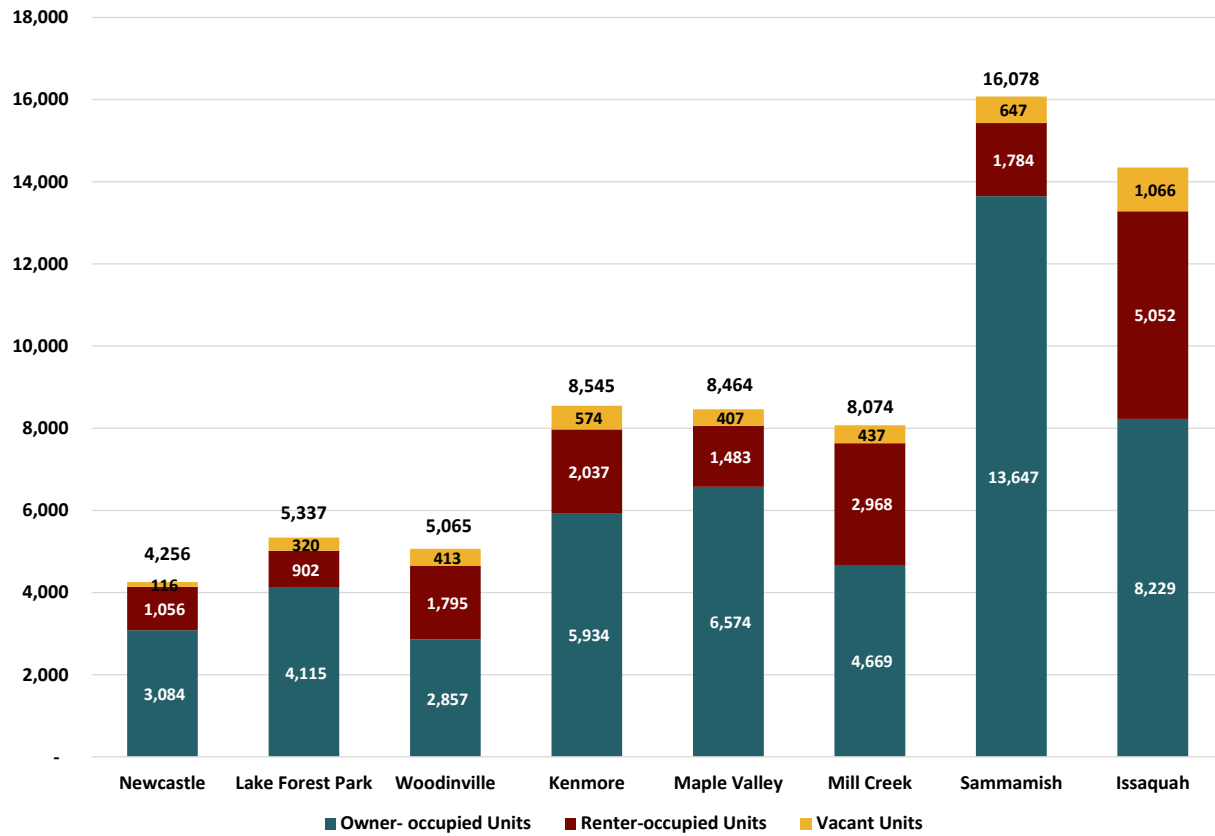
Source: Washington State Office of Financial Management

Source: Washington State OFM, 2000-2010 and 2010-2015; BERK, 2015

- Like most peer cities, Newcastle’s average annual growth rate for housing decreased significantly after 2010. This is partially a reflection of the decline in the regional housing market during the recession years.
- Newcastle had a higher housing unit average annual growth rate from 2000 to 2010 than its neighbors, with a 3.1% rate, and a similar housing unit average annual growth rate from 2010 to 2015, with a 0.9% rate.



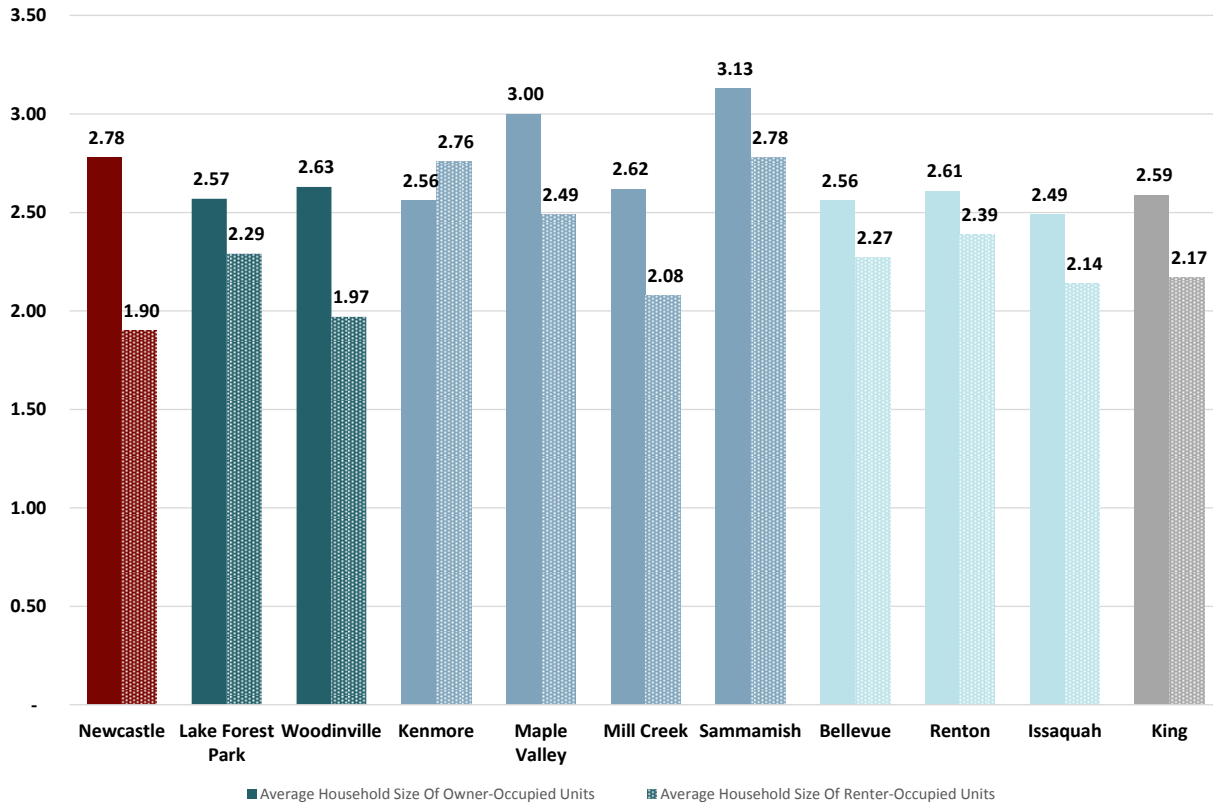
**Exhibit 15. Number of Owner-occupied, Renter-occupied, and Vacant Units, 2009-2013**



Source: U.S. Census, 2009-2013 American Community Survey; BERK, 2015

- From 2009 to 2013, Newcastle had an average of 3,084 owner-occupied units, 1,056 renter-occupied units, and 116 vacant units.

**Exhibit 16. Average Household Size of Owner-occupied Units and Renter-occupied Units**

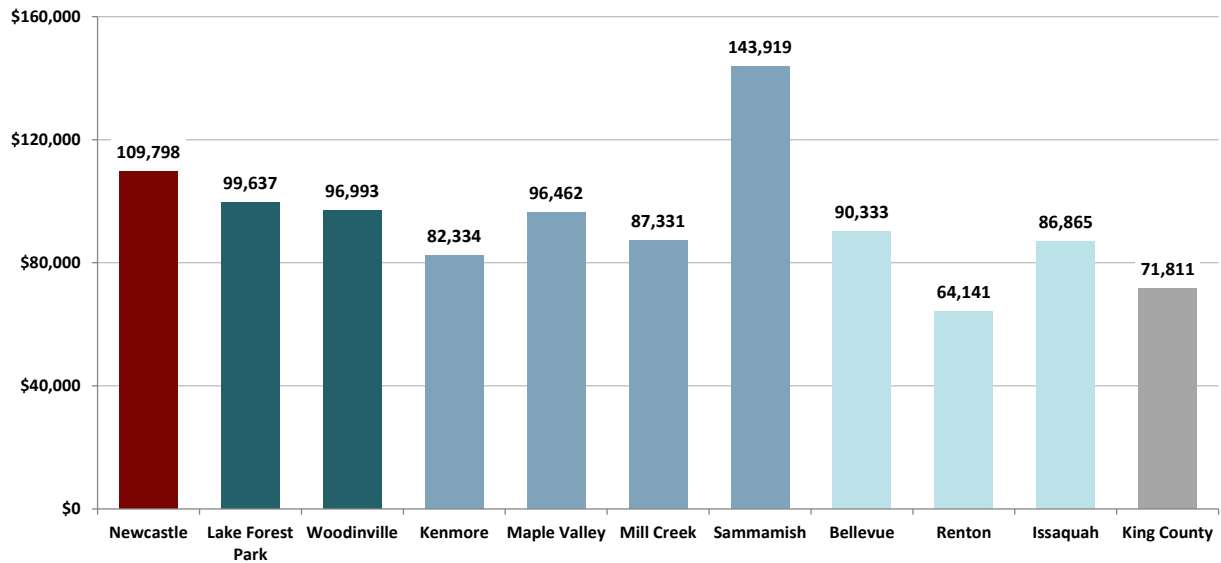


Source: U.S. Census, 2009-2013 American Community Survey; BERK, 2015

- Newcastle has an average owner-occupied household size of 2.78 and an average renter-occupied household size of 1.90. The average owner-occupied household size is somewhat greater than that found in its neighbors and in King County as a whole, while the average size of a renter-occupied unit is somewhat lower.

## INCOME

**Exhibit 17. Median Household Income, 2013**

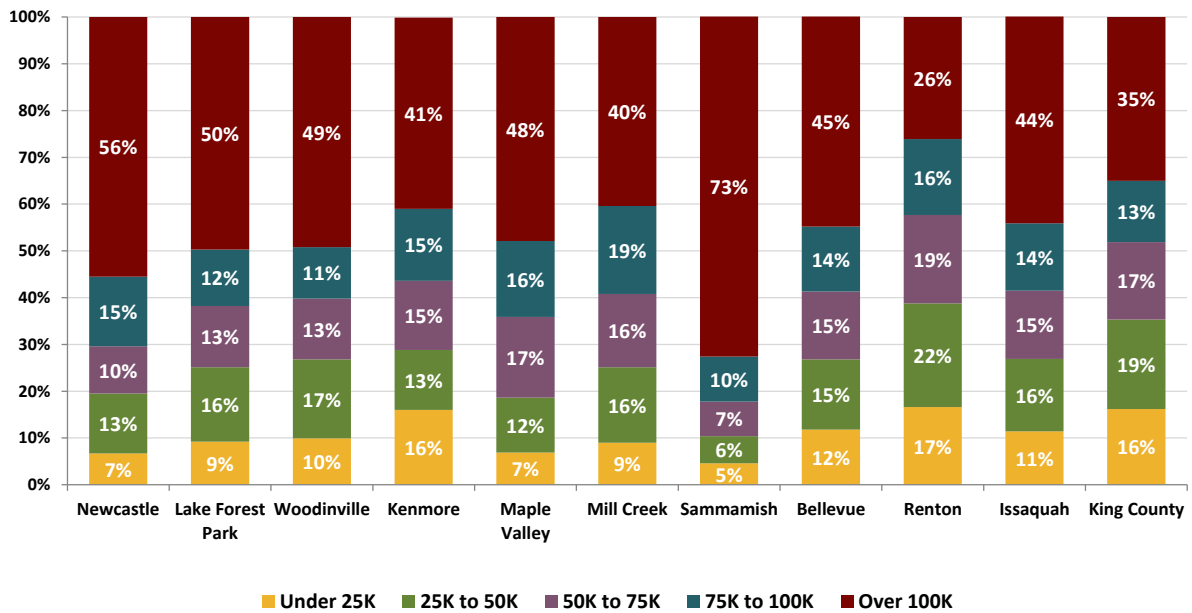


Note: Presented in 2013 inflation-adjusted dollars.

Source: United States Census, American Community Survey 5-Year Estimates, 2013; BERK, 2015

- The City of Newcastle has a higher median household income than its neighbors, Bellevue and Renton, and King County as a whole. Newcastle's median income is \$109,798; in comparison, the median income is \$90,333 in Bellevue, \$64,141 in Renton, and \$71,811 in King County.

**Exhibit 18. Household Income Distribution, 2013**

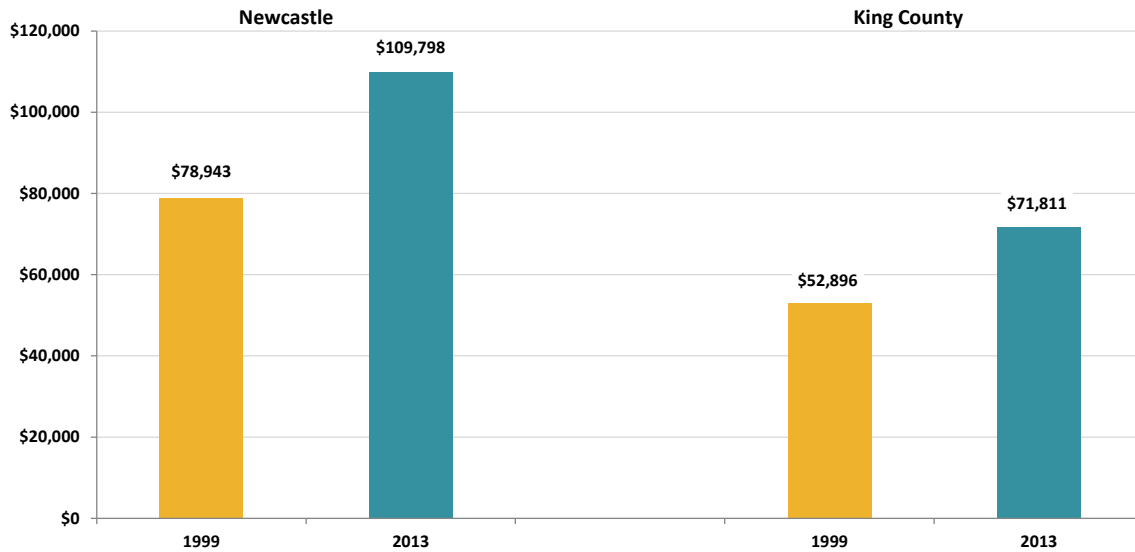


Note: Presented in 2013 inflation-adjusted dollars.

Source: United States Census, American Community Survey 5-Year Estimates, 2013; BERK, 2015

- The high-end distribution of Newcastle’s household income is more than most of its peers, neighbors and King County as whole, with over half of its households, 56%, making more than \$100,000. In comparison, 26% of Renton households make over \$100,000, 45% of Bellevue households, and 35% of King County households.

### Exhibit 19. Newcastle and King County: Median Household Income Over Time, 1999 and 2013



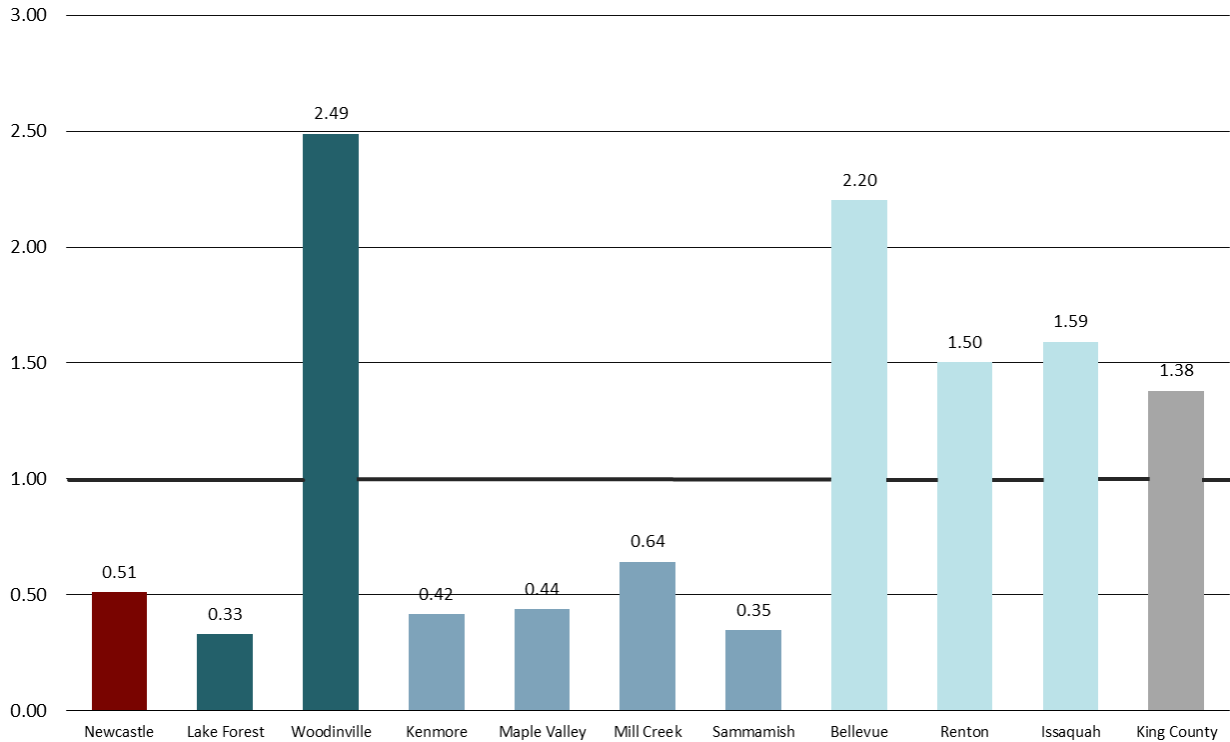
Source: United States Census, 2000; United States Census, American Community Survey 5-Year Estimates, 2009-2013; BERK, 2015

- The median income for Newcastle has increased more than the King County median income from 1999 to 2013. The Newcastle income increased from \$78,942 in 1999 to \$109,798 in 2013, and the King County income increased from \$52,896 to \$71,811 in that same time period.

## EMPLOYMENT

### Jobs-Housing Balance

Exhibit 20. Jobs-Housing Balance, 2014



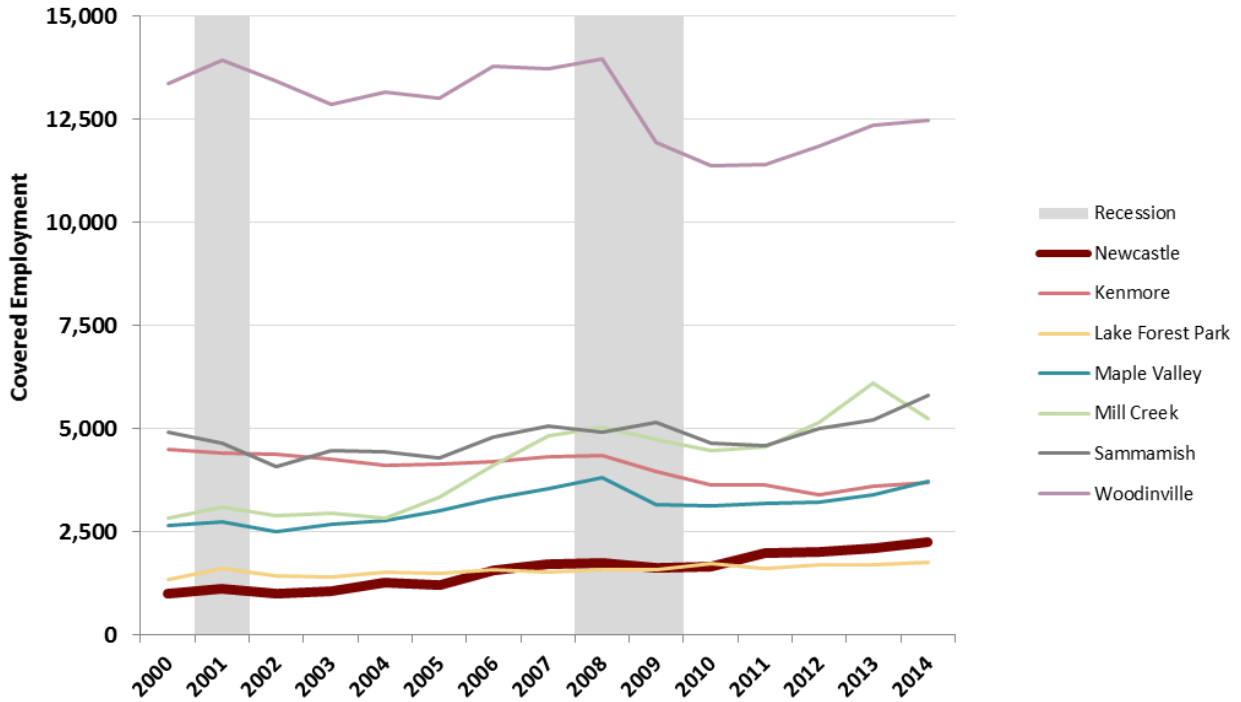
Jobs-Housing Ratio	0.51	0.33	2.49	0.42	0.44	0.35	0.64	2.20	1.59	1.50	1.38
Jobs 2014	2,245	1,763	12,463	3,693	3,723	5,818	5,234	129,064	23,752	61,721	1,214,503
Housing Units 2014	4,401	5,324	5,006	8,835	8,473	16,762	8,132	58,620	14,915	41,014	879,744

Source: OFM, 2015; Puget Sound Regional Council, 2015; BERK, 2015

- Reflecting its status as more residentially-oriented than employment-oriented community, Newcastle has a lower than average jobs-housing ratio (0.51) when compared to King County overall (1.38).
- The higher jobs-housing ratios of its largest neighbors (Bellevue 2.2, Renton 1.35 and Issaquah 1.59) reflect their relative strength as large employment centers both within the nearby and the larger central Puget Sound region.

## Total Employment

Exhibit 21. Total Employment, 2000 – 2014



Source: Puget Sound Regional Council, 2015; BERK, 2015

- From an employment perspective, Newcastle did not experience a significant drop in employment levels during either of the most recent recessions.
- Total employment for the larger neighbor cities of Issaquah, Renton and Bellevue are not shown as their levels of employment are a factor higher than identified peers. In 2014 Issaquah, Renton and Bellevue had employment numbers of 23,752; 61,721 and 129,064 respectively.

**Exhibit 22. Employment Summary by Sector, 2014<sup>1,2</sup>**

	Newcastle	Lake Forest Park	Woodinville	Kenmore	Maple Valley	Mill Creek	Sammamish	Bellevue	Renton	Issaquah	King County
Const/Res	99	122	1,645	404	458	428	194	5,000	2,356	539	55,947
Education	203	149	327	500	454	377	1,305	4,324	2,352	691	73,923
FIRE	-	67	326	103	109	360	159	11,670	-	666	64,657
Government	89	95	130	122	176	383	252	3,944	6,194	917	86,471
Manufacturing	-	25	2,453	45	35	50	11	5,193	-	1,018	104,900
Retail	237	219	1,538	407	440	901	612	13,994	5,304	3,397	121,832
Services	1,420	1,007	4,781	1,783	1,790	2,638	3,005	77,252	20,578	15,286	603,184
WTU	95	78	1,263	329	261	97	280	7,687	5,140	1,238	103,589
<b>Total</b>	<b>2,245</b>	<b>1,763</b>	<b>12,463</b>	<b>3,693</b>	<b>3,723</b>	<b>5,234</b>	<b>5,818</b>	<b>129,064</b>	<b>61,721</b>	<b>23,752</b>	<b>1,214,503</b>

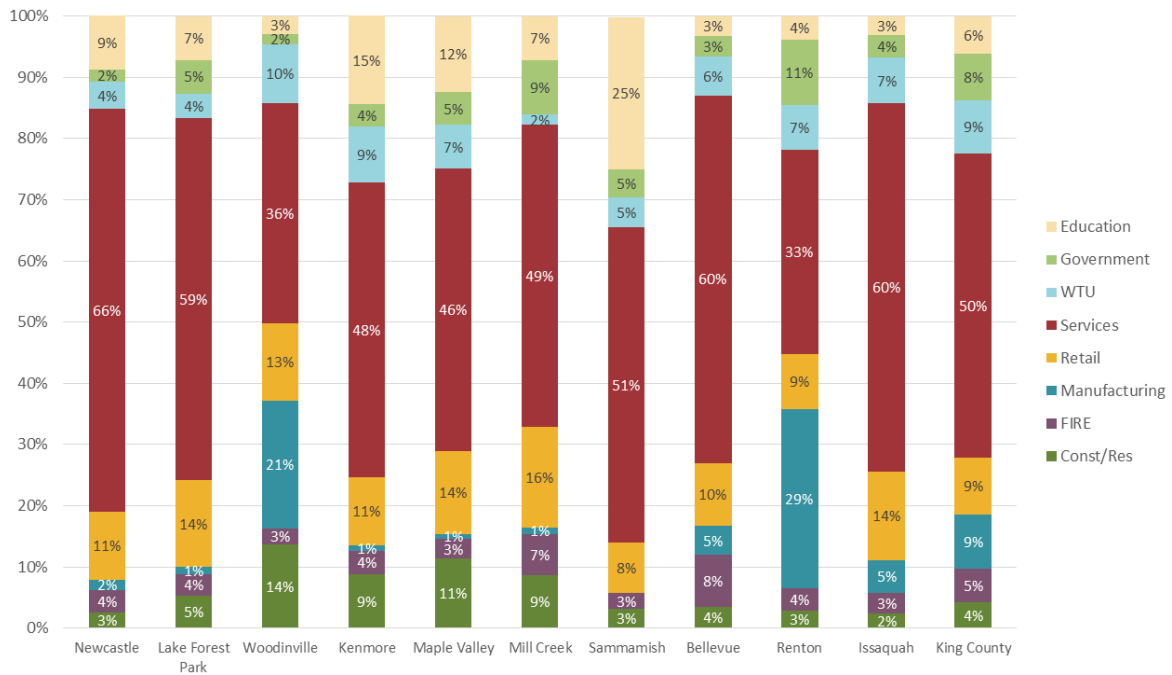
Source: Puget Sound Regional Council, 2015

**Exhibit 23. Employment Summary by Sector, 2012**

	Newcastle	Lake Forest Park	Woodinville	Kenmore	Maple Valley	Mill Creek	Sammamish	Bellevue	Renton	Issaquah	King County
Const/Res	53	90	1,622	300	366	444	156	4,318	1,695	507	47,474
Education	178	123	349	492	402	374	1,241	4,090	2,209	638	70,971
FIRE	73	61	307	127	106	347	130	10,379	2,087	683	62,648
Government	42	94	193	120	173	456	234	4,030	6,254	778	86,212
Manufacturing	34	20	2,479	32	25	57	11	5,827	17,110	1,114	101,121
Retail	225	243	1,490	375	439	845	418	12,694	5,225	2,997	107,890
Services	1,337	1,015	4,261	1,634	1,490	2,543	2,577	73,872	19,403	12,505	567,264
WTU	89	70	1,146	314	232	89	245	7,811	4,304	1,540	100,053
<b>Total</b>	<b>2,030</b>	<b>1,716</b>	<b>11,848</b>	<b>3,392</b>	<b>3,233</b>	<b>5,154</b>	<b>5,012</b>	<b>123,022</b>	<b>58,287</b>	<b>20,761</b>	<b>1,143,633</b>

Source: Puget Sound Regional Council, 2015

**Exhibit 24. Total Employment Distribution by Sector, 2012**



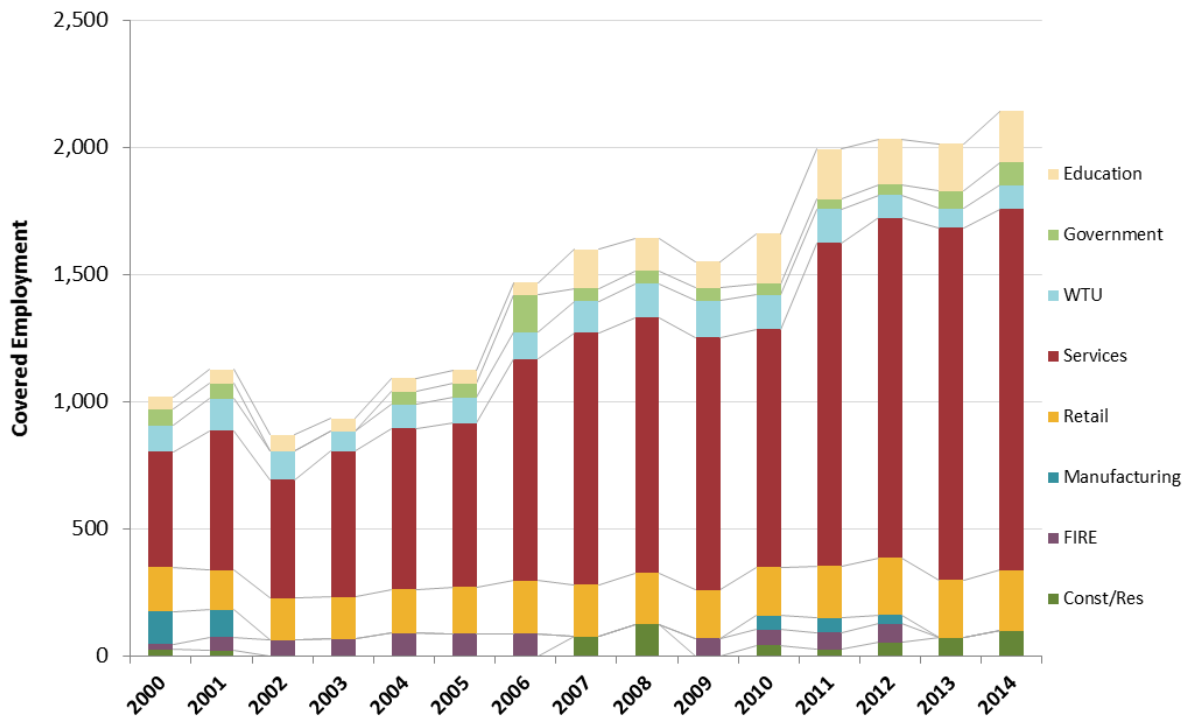
Source: Puget Sound Regional Council, 2015; BERK, 2015

<sup>1</sup> For 2013 and 2014, employment data suppressed for Manufacturing and FIRE sectors for Newcastle and Renton although employment numbers in total for each city are available. 2012 employment data for all sectors is listed to provide additional context for 2014 employment numbers.

<sup>2</sup> Const/Res = Construction and Resources; FIRE = Finance, Insurance, and Real Estate; WTU = Wholesale Trade, Transportation, and Utilities. Please see NAICS codes and categories discussion at end of document for additional details and descriptions.



**Exhibit 25. Total Employment by Sector: Newcastle (2000 – 2014)<sup>3</sup>**



Source: Puget Sound Regional Council, 2015; BERK, 2015

- Compared to any of its peers or larger neighbors, Newcastle has the highest proportion of its jobs (63%) situated in the services sector in 2014. Jobs in the service sector include: nursing homes, assisted living, recreation, outpatient health care, restaurants, dry cleaning, auto repair, pet care, hair salons, civic and social organizations, etc.
- The predominance of the service sector industry in Newcastle reflects its status as a place where local employment is largely centered around residents who work in larger, nearby employment centers.
- Service sector employment has increased in Newcastle both in absolute and relative terms over time. For example, in 2000 Newcastle's 453 service sector jobs comprised 45% of the city's total employment. By 2014, the number of service sector jobs in Newcastle had grown to 1,410 and comprised 63% of the city's total employment.
- Newcastle's second and third largest employment sectors are Retail and Education.
- Per PSRC, suppression of employment numbers for a given sector occurs when aggregate employment values represent fewer than three reporting firms, or when a single employer accounts for more than 80 percent of jobs. Additionally, since grand totals for employment are provided at the jurisdictional level, an additional sector's employment data will also be suppressed when any geography or employment category has a single suppressed value to prevent disclosure through subtraction.

<sup>3</sup> For 2013 and 2014, employment data suppressed for Manufacturing and FIRE sectors for Newcastle although employment numbers in total for the City are available.

### Exhibit 26. Newcastle Service Sector Employment, 2000-2014

Service Sector	2000	2005	2010	2012	2014	Larger Service Employers (Est Jobs 2013)	Example Sub-sectors/Jobs
Administrative and Support and Waste Management and Remediation Services	33	18	*	295	332	Cascadian Building Maintenance (197)	Travel agencies, payroll services, employment agencies, <b>janitorial services</b> , building facilities, call center support, collection agencies, credit bureaus, repossession businesses, security services, landscaping services, pest control, packaging and labeling, waste collection, waste treatment and disposal (excludes sewer and sewage treatment)
Other Services (Except Public Administration)	72	72	86	337	303	Coal Creek YMCA (180)	Auto repair and maintenance, nail salons, barber shops, hair salons, diet centers, funeral homes, cemeteries, drycleaning and laundry, pet care, photofinishing, parking lots and garages, religious organizations, grant making services, <b>civic and social organizations</b> , labor and professional organizations, housecleaners, private household staff
Arts, Entertainment, and Recreation	*	*	*	*	226	The Golf Course at Newcastle (153)	Performing arts, professional sports, agents, writers, musicians, dancers, actors, museums, amusement parks, casinos, <b>golf courses</b> , bowling, skiing, marinas
Health Care and Social Assistance	33	60	106	206	225	Regency Newcastle (43) Coal Creek Village (33) Coal Creek Marketplace (30)	<b>Doctors</b> , nurses, <b>dentists</b> , <b>optometrists</b> , mental health practitioners, <b>outpatient centers</b> , medical laboratories, home health care, hospitals, <b>nursing home</b> , <b>assisted living</b> , social services, day care, rehab centers, community food services, family services
Accommodation and Food Services	-	171	160	167	184	Coal Creek Village (75) Coal Creek Marketplace (38)	Hotels, bed & breakfast, RV Camps, <b>restaurants</b> , pubs, bars
Professional, Scientific, and Technical Services	56	71	81	108	102		Lawyers, accounting, tax preparation, architects, engineers, landscape architects, interior design, software engineering, coding, IT support, consulting, biotech R&D, advertising, public relations, photography, veterinarians
Information	*	33	24	28	40		Publishing, software publishers, motion pictures, radio and TV broadcasting, cable TV, telecom (e.g. wired, wireless, satellite), data processing and hosting, libraries, internet publishing and web search
Educational Services (Private Sector)	-	*	4	*	9		Business and secretarial schools, computer training, for-profit education (college, vocational), driving schools, language schools, exam preparation, flight training, tutoring, educational consultants
Management of Companies and Enterprises	-	-	-	-	-		Holding companies
<b>Total</b>	<b>453</b>	<b>644</b>	<b>935</b>	<b>1,337</b>	<b>1,420</b>		

Source: Puget Sound Regional Council, 2015; US Census, 2013: BERK, 2015

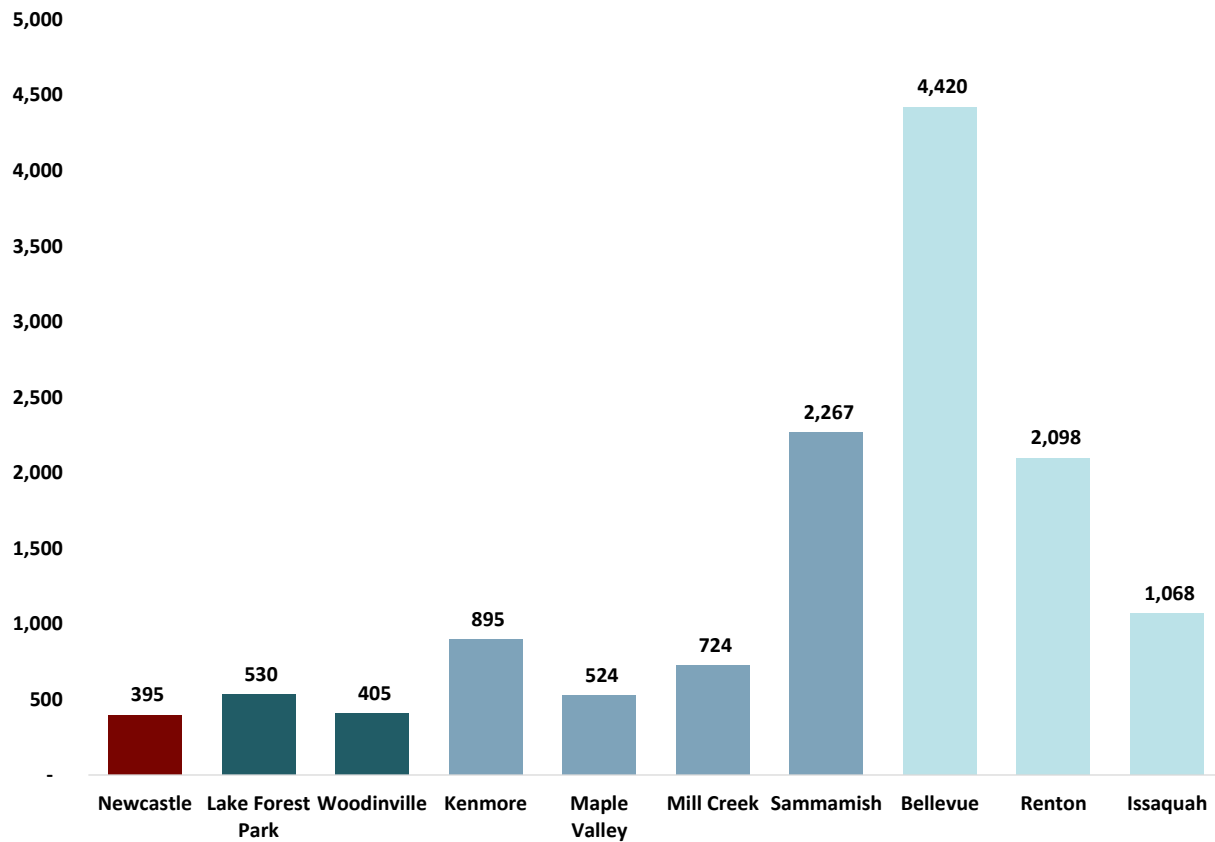
- Since 2000, the service sector has increasingly become the core employment sector in Newcastle comprising 453 jobs in 2000 and 1,420 jobs in 2014. This represents an increase of over 300% in service sector employment during this period.
- The service sector share of overall Newcastle employment has increased from 45% in 2000 to 63% in 2014.
- The largest service employers in Newcastle include Cascadian Building Maintenance, Coal Creek YMCA, and the Golf Club at Newcastle with each providing over 150 service sector jobs.
- Per PSRC policy, suppression of employment numbers within a given employment category (e.g. service) occurs when aggregate employment totals represent fewer than three reporting firms, or when a single employer accounts for more than 80 percent of jobs. Additionally, when totals for an employment category are provided and it is determined that an individual contributing sector's data will be suppressed, PSRC will also suppress an additional sector's data to prevent disclosure through subtraction. Suppressed employment numbers are represented by an asterisk in the table above.

## Home-based Workers

The United States Census Bureau indicated that the number of workers 16 years and older working at home is on the rise especially in western states such as Washington. In 2010, 13.4 million people worked at least one day at home per week. This is a 35% increase from 9.2 million people who worked at least one day at home per week in 1997.

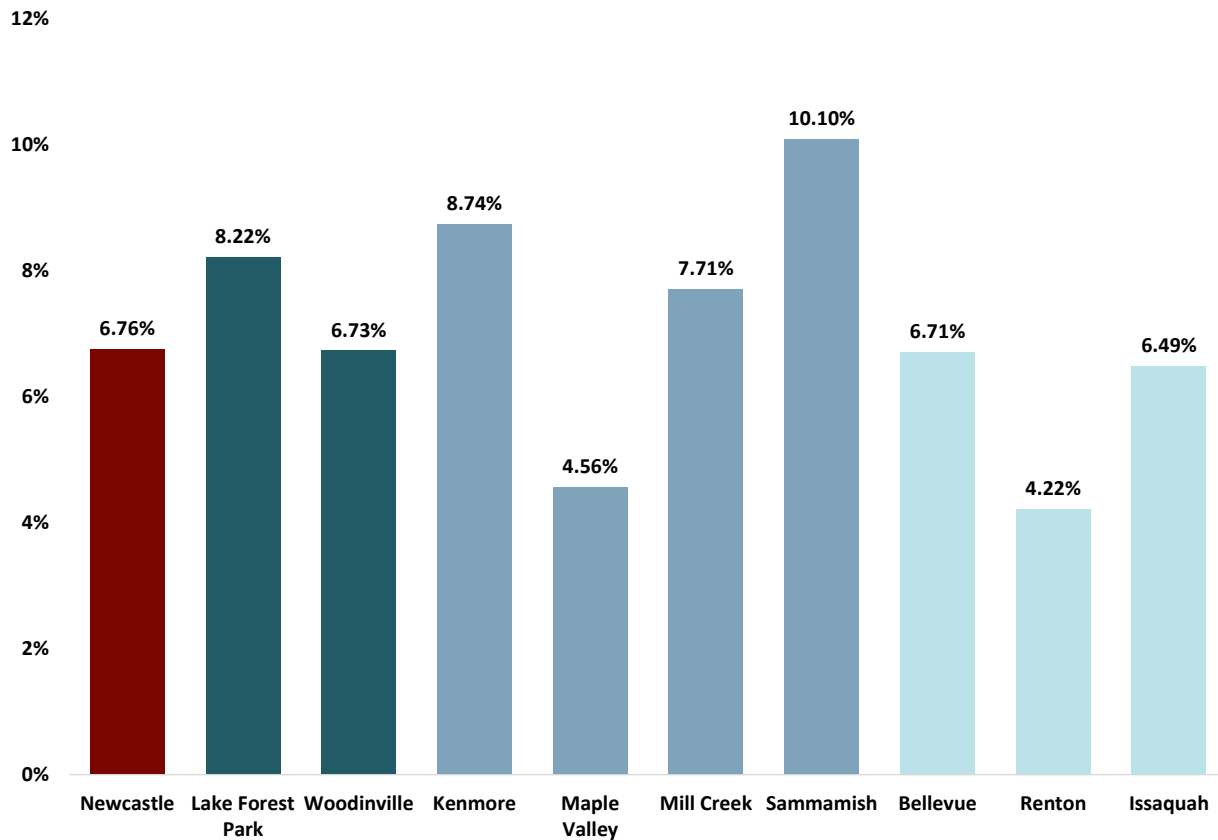
The 2014 American Community Survey 5-Year Estimates indicates that 6.8% or 395 of 5,843 Newcastle workers 16 years and older worked at home. The 2010 American Community Survey 5-Year Estimates indicated that 7.3% or 380 of 5,230 Newcastle workers 16 years and older worked at home.

**Exhibit 27. Number of Home-based Workers, 2014**



Source: U. S. Census, American Community Survey 5-Year Estimates, 2014; BERK, 2015

### Exhibit 28. Percentage of Home-based Workers, 2014



Source: Source: U. S. Census, American Community Survey 5-Year Estimates, 2014; BERK, 2015

- 6.76% of Newcastle workers 16 years and older are home-based workers.
- The percentage of home-based Newcastle workers 16 years and older is similar to the percentage of home-based workers in Woodinville and Bellevue. A higher percentage of Lake Forest Park workers 16 years and older (8.22%), Kenmore workers 16 years and older (8.74%), Mill Creek workers 16 years and older (7.71%), and Sammamish workers 16 years and older (10.10%) are home-based workers.

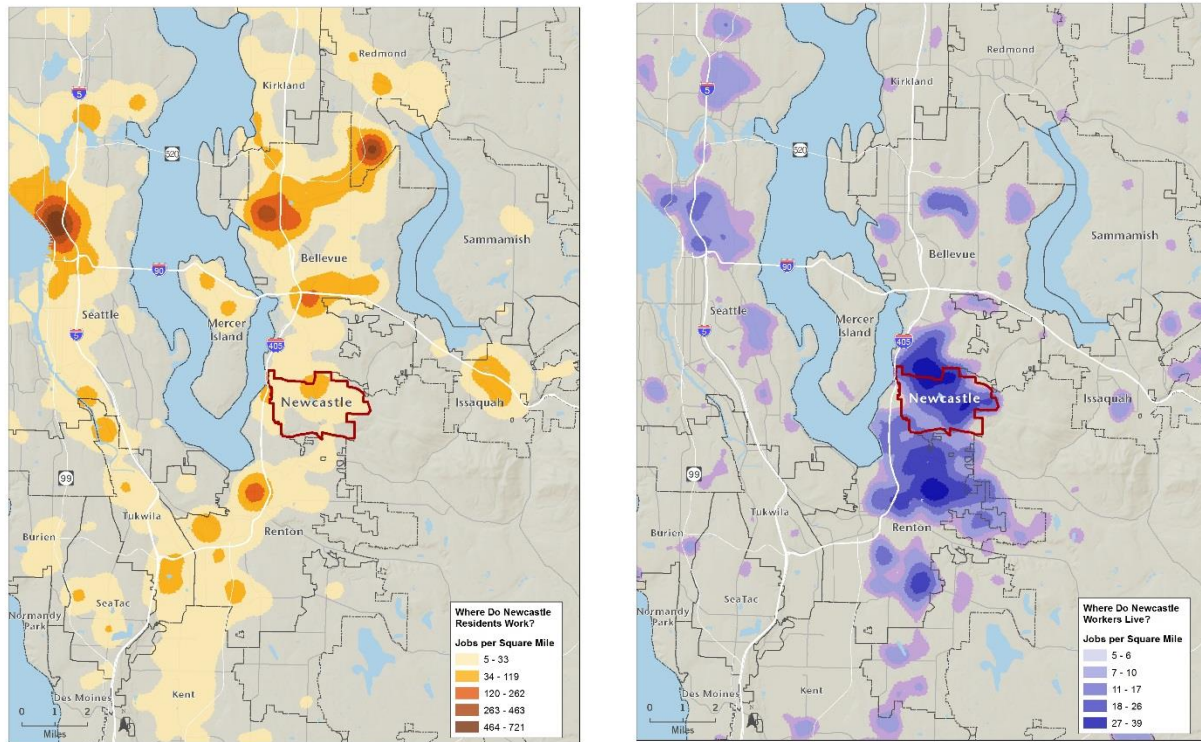
## Journey to Work

**Exhibit 29. Top Ten Locations of Where Newcastle Residents Work & Where Newcastle Workers Live, 2015**

Locations Newcastle Residents Are Commuting To			Locations Newcastle Workers Are Commuting From		
Location	Number	Percent	Location	Number	Percent
Seattle	1,329	31%	Seattle	265	15%
Bellevue	894	21%	Renton	201	12%
Redmond	428	10%	Bellevue	143	8%
Renton	346	8%	Kent	77	4%
Tukwila	181	4%	Newcastle	75	4%
Kirkland	155	4%	East Renton Highlands	38	2%
Issaquah	130	3%	Kirkland	36	2%
Kent	117	3%	Tacoma	33	2%
Newcastle	75	2%	Issaquah	29	2%
Everett	71	2%	Auburn	28	2%
All Other Locations	598	14%	All Other Locations	793	46%
All Locations	4,324	100%	All Locations	1,718	100%

Source: U.S. Census Bureau, OnTheMap Application, 2015

**Exhibit 30. Where Newcastle Residents Work & Where Newcastle Workers Live, 2015**

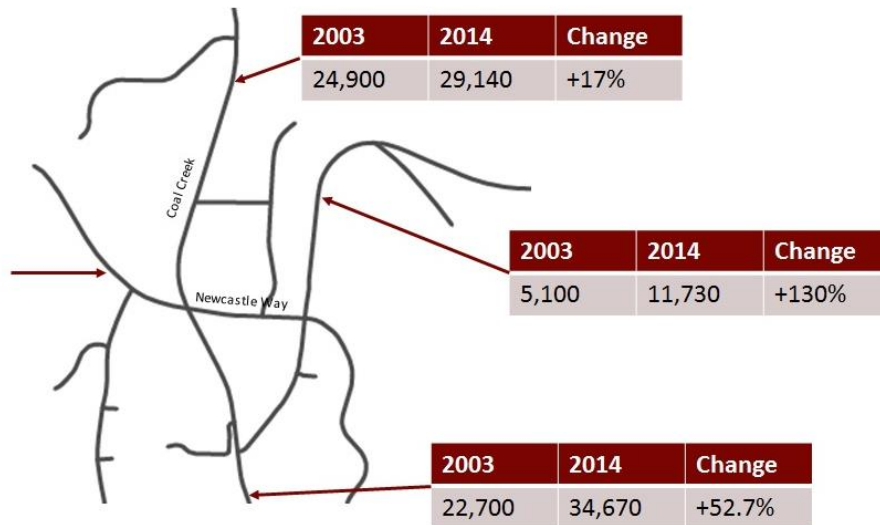


Source: U.S. Census Bureau. 2015, OnTheMap Application

- The vast majority of Newcastle residents work outside of Newcastle. For 2013, the most recent year data is available, approximately 98% of Newcastle residents worked outside Newcastle.
- Employment clusters for Newcastle residents are located in downtown Seattle, downtown Bellevue, Overlake in Redmond, Factoria in Bellevue, and Renton.
- The majority of workers in Newcastle live either within or immediately south of the City in Renton.

## Traffic Volumes

**Exhibit 31. Traffic Volumes, 2014**



Source: City of Newcastle, 2014; BERK, 2015

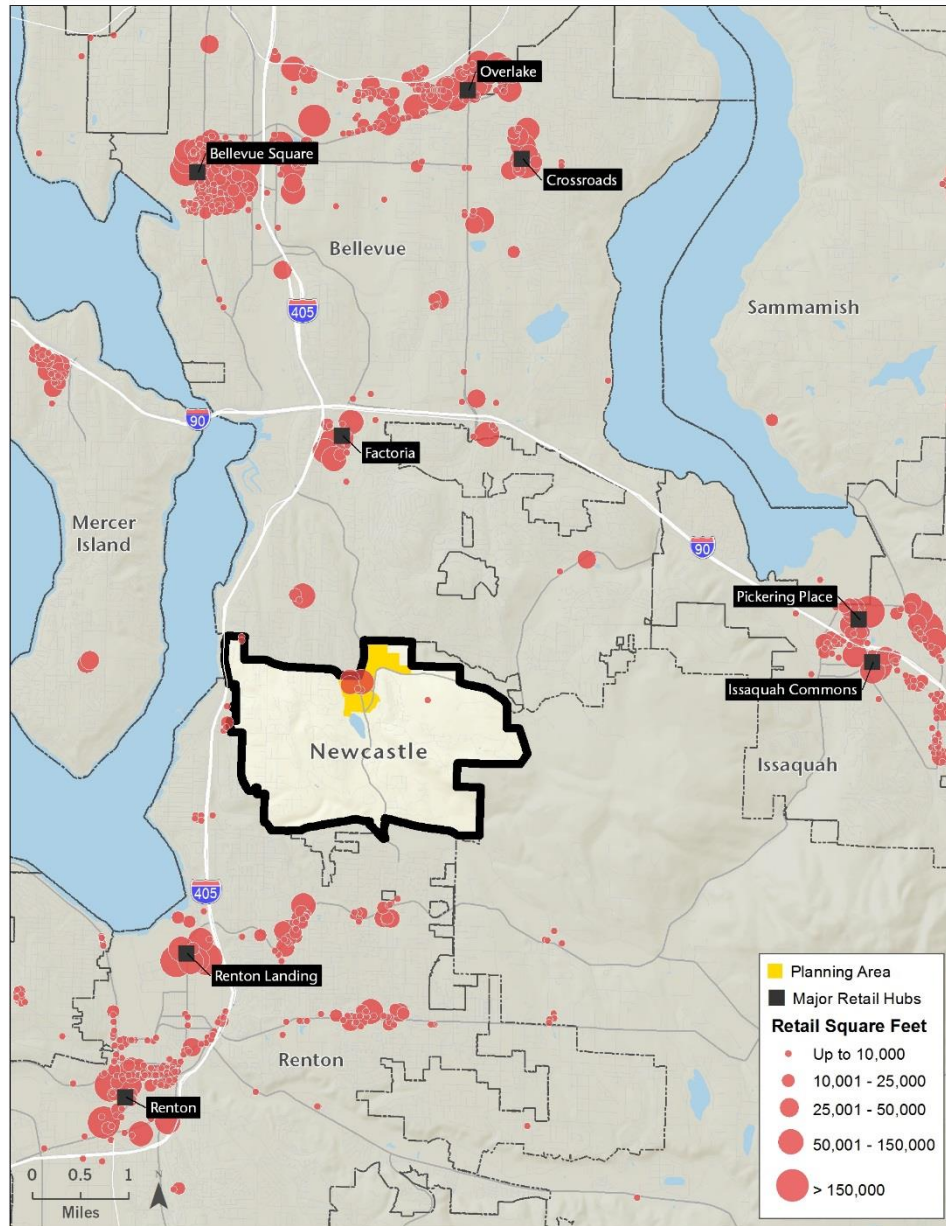
- In 2014, approximately 35,000 vehicles per day passed through Newcastle’s downtown sector via Coal Creek Parkway.
- This represents a net increase of 12,000 vehicles or per day or 52% more vehicles on Coal Creek Parkway since 2003 when approximately 23,000 vehicles per day passed along the same route.<sup>4</sup>

<sup>4</sup> Comprehensive Plan, City of Newcastle, 2003

## RETAIL

### Retail Square Footage in the Newcastle Region

Exhibit 32. Retail Locations by Square Feet, 2015

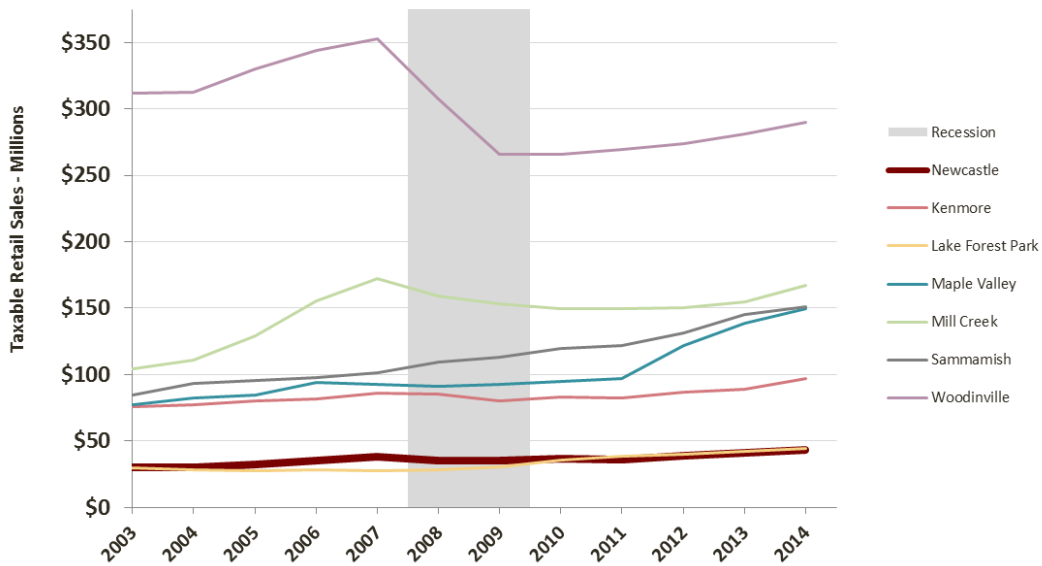


Source: King County Assessor, 2015

- Large retail clusters exist close to Newcastle and are easily accessible by car. These retail nodes include Factoria, downtown Bellevue, Overlake, Issaquah, and Renton Landing.

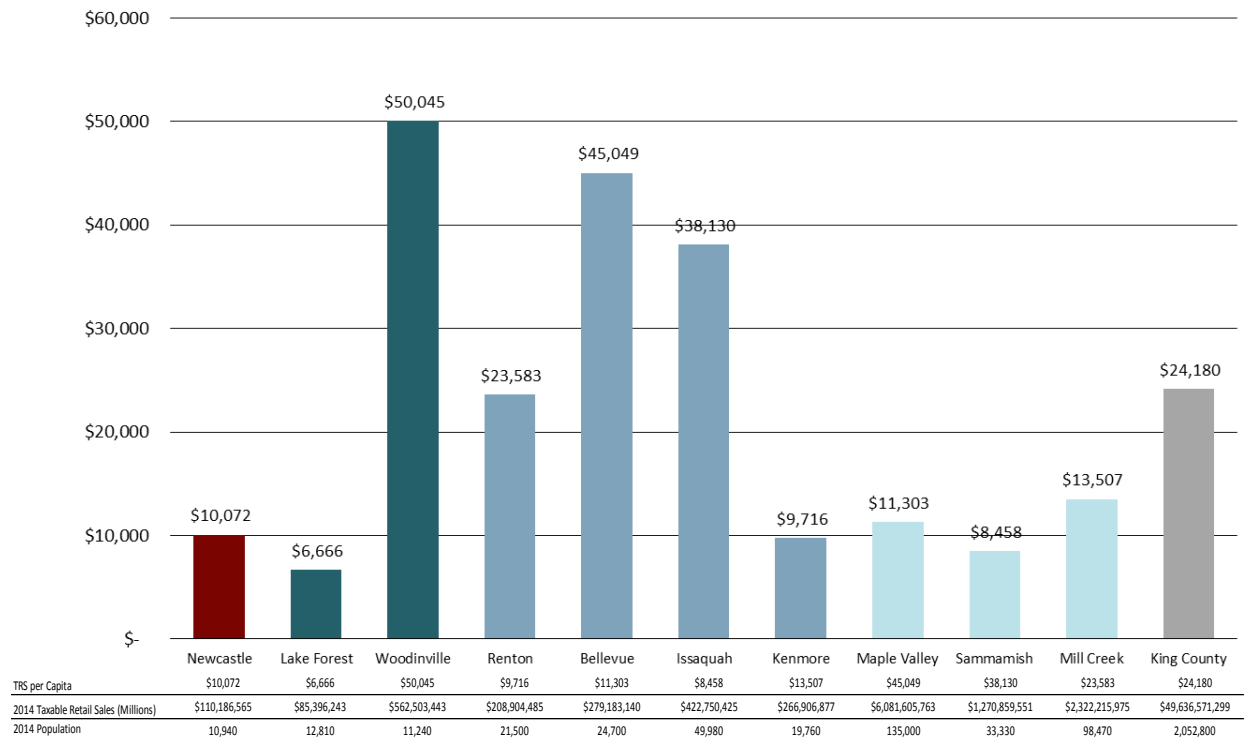
## Taxable Retail Sales (TRS)

**Exhibit 33. Total Inflation Adjusted Taxable Retail Sales in 2014 Dollars, 2003 -2014**



Source: Washington State Department of Revenue, 2015; BERK, 2015

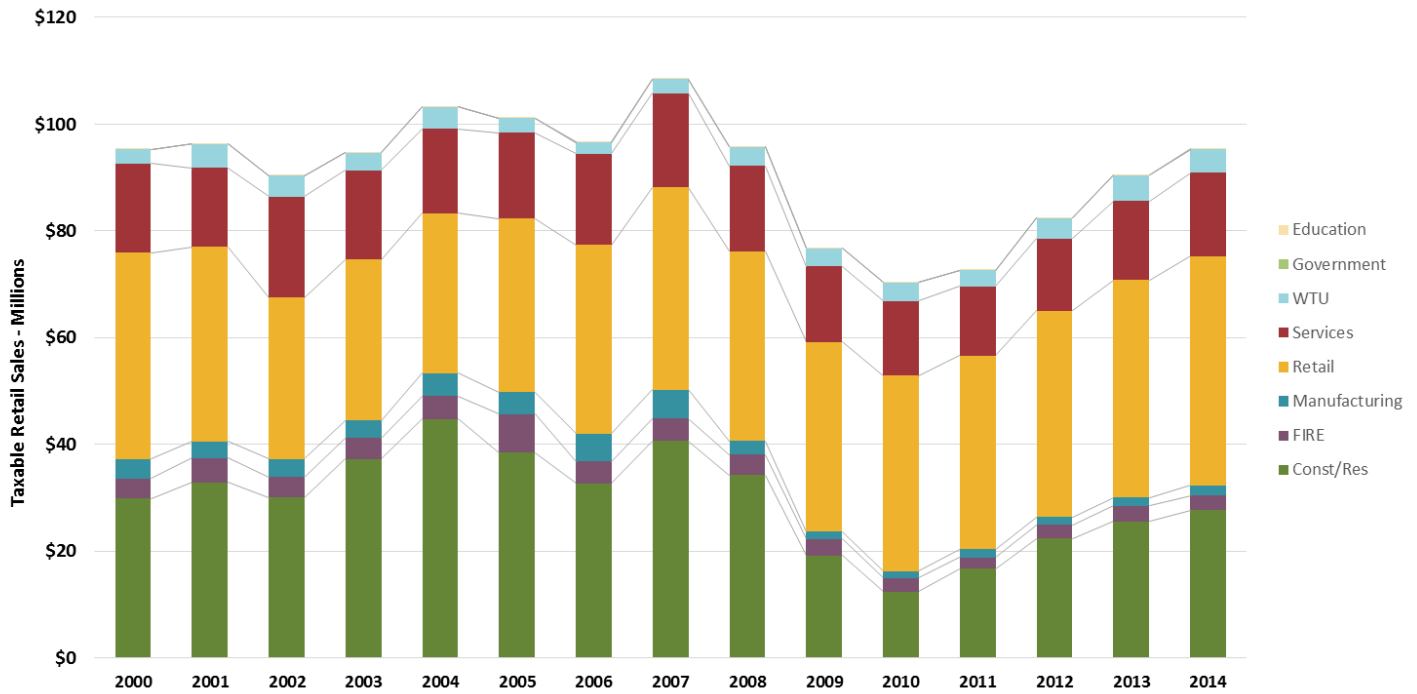
**Exhibit 34. Taxable Retail Sales per Capita, 2014**



Source: Washington State Department of Revenue, 2015; BERK, 2015



**Exhibit 35. Inflation Adjusted Taxable Retail Sales in Newcastle in 2014 Dollars, 2000 – 2014**



Source: Washington State Department of Revenue, 2015; BERK, 2015

- Despite a decrease during the recent recession, once adjusted for inflation taxable retail sales have remained remarkably steady between 2000 (\$95.31 million) and 2014 (\$95.33 million).
- In 2014 retail (45%), construction/resources (29%), and services (16%) together comprised approximately 90% of the total taxable retail sales in Newcastle.
- The share of retail as percentage of Newcastle’s total TRS has increased from approximately 41% in 2000 to 45% in 2014.
- As a city, Newcastle’s TRS per capita (\$10,072) is well below that of King County (\$24,180) and its larger neighbor cities of Bellevue (\$45,049), Issaquah (\$38,130), and Renton (\$23,583). This reflects the neighboring cities’ relative dominance of the retail sector in the east-central Puget Sound region.

## Person-Expenditures

One way to assess the relative strength of a city's retail sector is in terms of "person-expenditures." For example, if a typical person in Washington spends \$1,000 annually on grocery store purchases, and if grocery stores in a given city generate a combined \$1 million in grocery sales per year, then the city's grocery stores are taking in the equivalent of 1,000 people's expenditures (i.e. \$1 million of expenditures divided by \$1,000 per person = 1,000 person-expenditures).

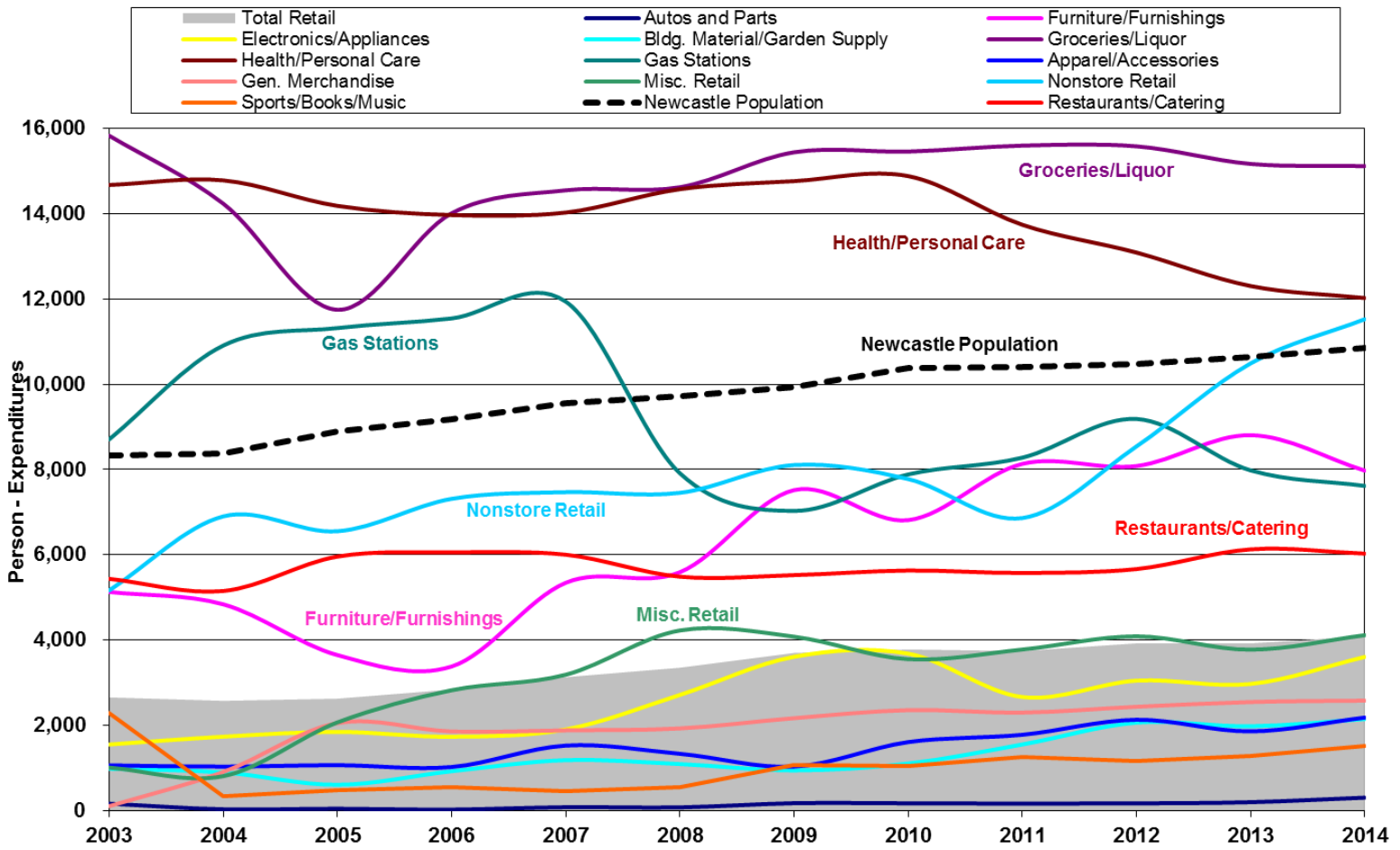
High-performing retail sectors will typically draw in more person-expenditures from the surrounding population because they capture retail sales from persons outside the immediate community.

**Exhibit 36. Person-Expenditures Captured by Newcastle Retailers, 2003-2014**

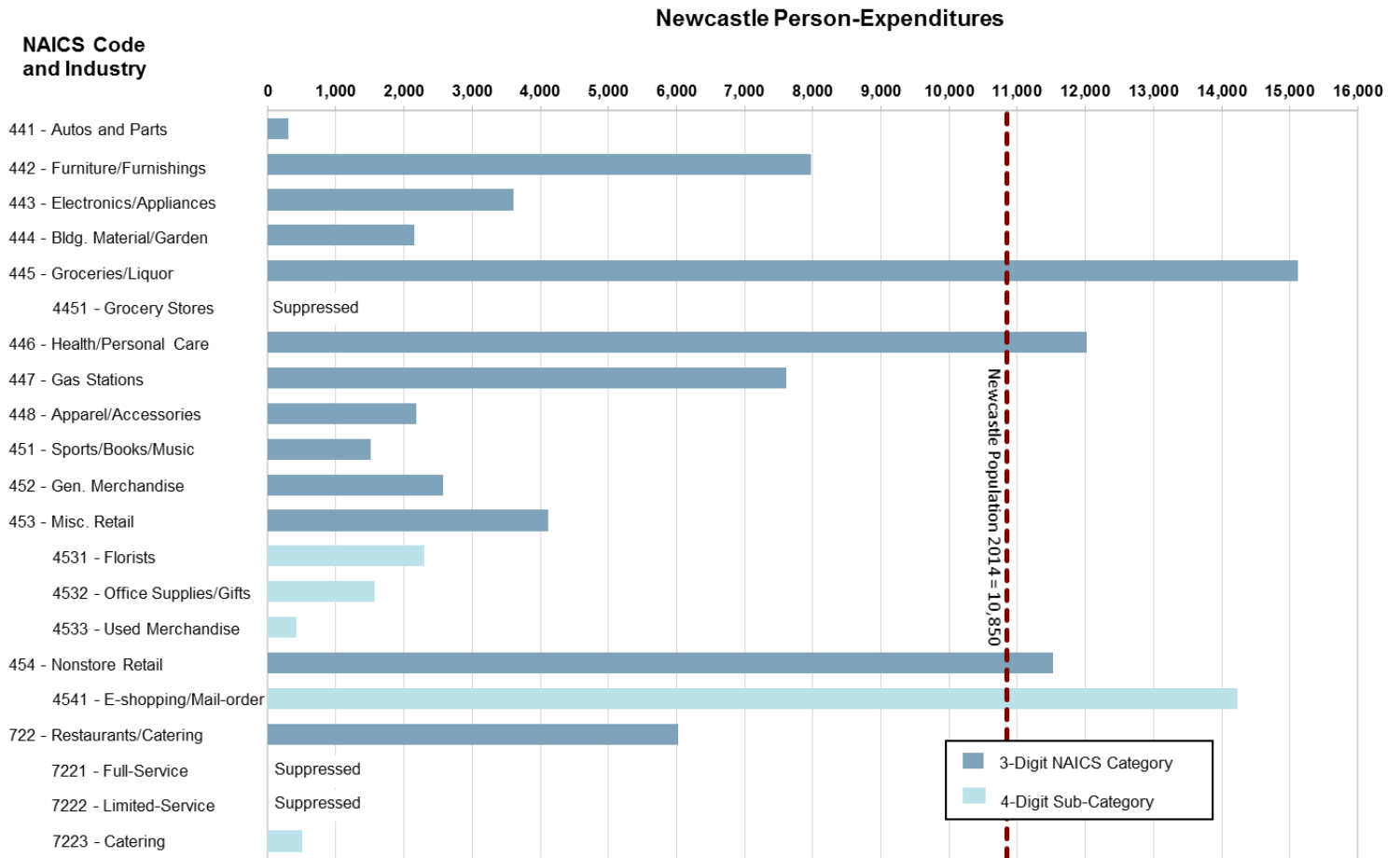
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
<b>Newcastle Population</b>	<b>8,320</b>	<b>8,375</b>	<b>8,890</b>	<b>9,175</b>	<b>9,550</b>	<b>9,720</b>	<b>9,925</b>	<b>10,380</b>	<b>10,410</b>	<b>10,460</b>	<b>10,640</b>	<b>10,850</b>
Groceries/Liquor	15,829	14,235	11,745	14,008	14,547	14,619	15,439	15,456	15,595	15,578	15,166	15,115
Health/Personal Care	14,673	14,780	14,182	13,967	14,027	14,575	14,762	14,881	13,738	13,087	12,302	12,021
Nonstore Retail	5,162	6,899	6,549	7,310	7,466	7,452	8,104	7,774	6,860	8,541	10,489	11,524
Furniture/Furnishings	5,126	4,836	3,646	3,378	5,342	5,590	7,515	6,811	8,131	8,081	8,804	7,972
Gas Stations	8,704	10,907	11,317	11,541	11,937	7,910	7,027	7,883	8,277	9,184	7,977	7,614
Restaurants/Catering	5,435	5,150	5,956	6,052	6,000	5,485	5,521	5,630	5,571	5,664	6,126	6,026
Misc. Retail	1,007	807	2,067	2,821	3,184	4,224	4,078	3,550	3,777	4,086	3,772	4,113
Electronics/Appliances	1,549	1,733	1,845	1,730	1,902	2,711	3,607	3,679	2,661	3,046	2,968	3,604
Gen. Merchandise	103	904	2,050	1,853	1,879	1,925	2,166	2,353	2,297	2,433	2,544	2,577
Apparel/Accessories	1,058	1,029	1,064	1,021	1,523	1,330	1,029	1,605	1,777	2,129	1,856	2,181
Bldg. Material/Garden Supply	979	894	604	922	1,180	1,090	941	1,101	1,549	2,062	1,975	2,144
Sports/Books/Music	2,301	332	472	537	457	554	1,061	1,045	1,253	1,171	1,286	1,504
Autos and Parts	161	28	42	22	78	74	172	169	162	168	195	302
<b>Total Retail</b>	<b>2,652</b>	<b>2,572</b>	<b>2,622</b>	<b>2,837</b>	<b>3,126</b>	<b>3,348</b>	<b>3,695</b>	<b>3,775</b>	<b>3,741</b>	<b>3,921</b>	<b>3,919</b>	<b>4,087</b>

Source: Washington State Department of Revenue, 2015; BERK, 2015

**Exhibit 37. Person-Expenditures: Captured by Newcastle Retailers, 2003-2014**



**Exhibit 38. Person-Expenditures by Industry: Newcastle, 2014<sup>5</sup>**



Source: Washington State Department of Revenue, 2015; BERK, 2015

- The groceries/liquor retail store sector has consistently performed as the City’s leading retail sector over time. The groceries/liquor sector draws in shoppers who live outside of Newcastle.
- The health and personal care store retail sector has historically been a leading retail sector for Newcastle. Since 2010, Newcastle has been losing its comparative advantage in this sector.
- Nonstore retail includes online retail purchases. The recent surge in this retail sector reflects both the larger strength in the larger economy as well the relative affluence of Newcastle shoppers who use online shopping as a viable alternative to traditional brick and mortar purchases.
- The restaurant and catering sector offers an opportunity for retail growth as the availability of restaurants in Newcastle is currently underserving its residents as measured by person-expenditures.

<sup>5</sup> Suppression is done to protect the confidentiality of the businesses that report the data to the Washington Department of Revenue. The threshold for suppression is if there are 3 or fewer businesses in a sector, or if one business has more than 80% of the total sales in the sector.

## Newcastle Retail Pull Factor

**Exhibit 39. Newcastle Retail Sales Pull Factor, 2014**

Category	Newcastle							Newcastle & Neighbors			
	(A)	(B)	(C)	(D)	(A)-(C)	(B)-(D)	(D)/(B)	Retail Pull Factor			
	Total Sales Potential	Total Sales Tax Potential	Total Sales Made	Total Sales Tax Received	Difference Sales Potential-Sales Made	Difference Tax Potential-Tax Received	Tax Received as Percentage of Total Possible	Newcastle	Bellevue	Issaquah	Renton
Groceries/Liquor	\$6,696,527	\$63,617	\$8,050,992	\$76,484	-\$1,354,465	-\$12,867	120%	1.20	1.40	1.82	1.36
Health/Personal Care	\$3,269,690	\$31,062	\$3,126,403	\$29,701	\$143,287	\$1,361	96%	0.96	2.20	2.28	2.07
Nonstore Retail	\$5,745,855	\$54,586	\$5,266,748	\$50,034	\$479,107	\$4,552	92%	0.92	2.08	1.67	1.47
Furniture/Furnishings	\$3,904,836	\$37,096	\$2,476,001	\$23,522	\$1,428,835	\$13,574	63%	0.63	2.26	2.95	9.78
Restaurants/Catering	\$20,734,817	\$196,981	\$9,938,247	\$94,413	\$10,796,570	\$102,567	48%	0.48	2.07	2.10	1.88
Misc. Retail	\$8,230,104	\$78,186	\$2,692,435	\$25,578	\$5,537,669	\$52,608	33%	0.33	1.97	2.05	1.96
Electronics/Appliances	\$5,869,761	\$55,763	\$1,682,532	\$15,984	\$4,187,229	\$39,779	29%	0.29	3.98	3.19	3.29
Gen. Merchandise	\$19,326,041	\$183,597	\$3,960,649	\$37,626	\$15,365,392	\$145,971	20%	0.20	1.07	4.69	2.20
Apparel/Accessories	\$7,397,522	\$70,276	\$1,283,135	\$12,190	\$6,114,387	\$58,087	17%	0.17	6.24	0.84	0.60
Bldg. Material/Garden Supply	\$9,649,504	\$91,670	\$1,645,851	\$15,636	\$8,003,653	\$76,035	17%	0.17	1.22	3.44	1.60
Sports/Books/Music	\$4,189,099	\$39,796	\$501,085	\$4,760	\$3,688,014	\$35,036	12%	0.12	2.91	5.01	1.19
Autos and Parts	\$24,429,031	\$232,076	\$586,774	\$5,574	\$23,842,257	\$226,501	2%	0.02	3.84	1.65	3.97
<b>Total</b>	<b>\$119,442,790</b>	<b>\$1,134,707</b>	<b>\$41,210,852</b>	<b>\$391,503</b>	<b>\$78,231,938</b>	<b>\$743,203</b>	<b>35%</b>	<b>0.35</b>	<b>2.50</b>	<b>2.57</b>	<b>2.50</b>

Source: Washington State Department of Revenue, 2015; BERK, 2015

A retail pull factor is a calculation that expresses the relative amount of retail sales that is leaving a community based upon its population and taxable retail sales.

A retail pull factor of 1 is neutral meaning that there are as many people coming into your community to shop as there are residents going elsewhere. A retail pull factor of <1 means there are more people leaving your community to shop than are coming into your area to shop – this is also known as retail leakage. A retail pull factor of >1 means more people are coming to your community shop than going elsewhere – this is also known as retail surplus.

A retail surplus in a given retail sector indicates that a community is capturing the local market plus additional shoppers from outside its boundaries. However, having a retail surplus alone does not necessarily translate into a lack of additional market share for new retailers as communities can have clusters of destination retailers that have a geographical appeal larger than its local trade area.

Retail leakage in a given retail sector indicates that residents in a community are spending more on retail outside of their community. However, a pull factor indicating retail leakage alone does not necessarily mean that a community should invest energy into realizing new retail space in those retail sectors identified as underserved. In the case of Newcastle, it is uniquely located among three larger retail nodes on the Eastside that have high pull factors across numerous retail sectors (Exhibit 37). In practice, this translates into Newcastle residents traveling to Bellevue to purchase clothes, Issaquah for big-box purchases, and Renton for furniture. The retail strengths and realities of Newcastle's large retail neighbors suggests that future retail investment and growth in Newcastle should occur in locally serving retail sectors that can successfully pull from local and nearby residents. Examples of this type of retail include restaurants, niche retailers, and services.

The chart above quantifies the relative amount of potential retail sales being lost to retailers located outside Newcastle. The sales potential is based both on Newcastle's population and the spending expected from a community its size. Sales Potential (A) is adjusted for the per capita income of Newcastle relative to the State which makes the numbers slightly different than the person expenditure data, which are not adjusted.

The blue section shows three different ways retail leakage and surplus for Newcastle can be expressed:

- 1) Amount of potential sales lost,
- 2) Amount of potential sales tax revenue lost, and
- 3) Percentage of sales potential being received in each retail category.

The yellow section highlights Newcastle's comparative retail position against its larger retail neighbors of Bellevue, Issaquah, and Renton using calculated pull factors across retail sectors for each community. Key findings suggested by the data include:

- Newcastle outperforms in the Grocery/Liquor, Health/Personal Care, and Nonstore Retail sectors.
- The Restaurant/Catering retail sector exists as a potential opportunity for retail expansion in Newcastle.
- Bellevue, Renton, and Issaquah all exhibit strong pull factors across nearly all retail sectors – especially in comparison with Newcastle. This suggest that future retail investment in Newcastle should be centered on locally serving convenience sectors including restaurants; smaller, niche retailers; and local services.

## RECENT AND POTENTIAL DEVELOPMENT

The City of Newcastle is experiencing a very high rate of residential development activity, particularly in the CBC. Exhibit 40 highlights recently permitted development in the CBC and other areas of the City.

**Exhibit 40. Recent Permitted Development, 2015**

<b>Development</b>	<b>Residential Units</b>	<b>Year</b>	<b>Location</b>
<b>Atlas</b>	98	2017-18	CBC
<b>Newcastle Apartments</b>	80	2016-17	CBC
<b>Avalon Apartments – 3A</b>	254	2017	CBC
<b>Avalon Townhomes – 2A-F</b>	43	2017	CBC
<b>Avalon Townhomes – 5A</b>	60	2016	
<b>Avalon Townhomes – 5B-5E</b>	21	2017	CBC
<b>Avalon Townhomes – 5B-5E (Phase II)</b>	541	2022-2035	CBC
<b>Other Developments</b>	198	2016-2017	Outside CBC
<b>Total Residential Units:</b>	<b>1,295</b>		
<b>Total CBC Units 2015-2018:</b>	<b>556</b>		
<b>Total CBC Units 2022-2035:</b>	<b>541</b>		
<b>Commercial SF – Avalon:</b>	<b>50,000</b>	2015-2022	CBC

Source: City of Newcastle, 2015

## ADDITIONAL NON-RESIDENTIAL SPACE ESTIMATES

### Summary

As population increases both in Newcastle and the immediately surrounding area, commensurate demand for additional non-residential space will also be generated as new employees and new businesses are added to support demands generated by a growing population. Exhibit 41 presents the summary estimates for future additional non-residential square footage as broken out by economic sector using the 2035 time horizons. Using City provided population estimates as a baseline and taking into account planned development in Avalon, it is projected that Newcastle will likely add approximately between 46,300 and 67,700 of net additional non-residential square feet by 2035.

**Exhibit 41. Summary of Future Additional Non-Residential Space**

Economic Sector	Base	Additional Non-Residential Square Feet - 2035	
Retail and Restaurant	46,800		
Services, Finance, and Real Estate	34,500		
Warehouse, Transportation, and Utilities	16,200		
Construction and Resource	5,600		
Education	3,600		
Government	300		
<b>Total</b>	<b>107,000</b>		
<b>Summary</b>		<b>Low/Conservative (base minus 10%)</b>	<b>High/Optimistic (base plus 10%)</b>
Gross Additional Development Potential		96,300	117,700
Planned for Avalon		50,000	50,000
<b>Net Additional Development Potential In Addition to Avalon</b>		<b>46,300</b>	<b>67,700</b>

Note: For all non-residential space estimates, the planned development associated with the Avalon development is expected to realize up to 50,000 square feet of additional new non-residential space mostly in the form of retail, restaurant, and/or service oriented space. For each of the future non-residential space estimates provided, portions of the future 50,000 square feet Avalon development space should be taken into consideration where appropriate.

Source: City of Newcastle, 2015; DOR, 2015; PSRC, 2015; BERK, 2015

Space estimates for all sectors with the exception of retail and restaurant space are calculated using the employment forecast model discussed in more detail below. For retail and restaurants, the numbers presented in Exhibit 41 reflect the average of the three retail space models outlined in Exhibit 42 to estimate future additional space. Due to more robust, available retail and restaurant square footage data as well as taxable retail sales data, more modeling options were available for the retail and restaurant sector than other economic sectors.

### Retail Space

Currently, retail space exists as the predominate type of non-residential space in Newcastle with an estimated current stock of 153,000 square feet devoted to retail and restaurant use. In estimating future demands for additional retail and restaurant space, three different modeling approaches were used based upon available data: Taxable Retail Sales, Supportable Retail Space, and Employment Forecast. Although each of the retail models estimates future retail space, each model uses different units of analysis: Dollars (Taxable Retail Sales); Built Space (Supportable Retail Space); and Jobs (Employment Forecast). Each approach for estimating future retail space, inclusive of restaurants, is outlined below including the resulting retail square footage estimates.

- 1) Taxable Retail Sales Approach:** The taxable retail sales approach uses current taxable retail sales data, calculated retail pull factors, and forecasted population growth rates as baseline variables in its model. In sum, increased retail sales associated with population growth are translated into associated gains in additional future retail space as shown in Exhibit 42.



### Exhibit 42. Future Additional Retail Space – Taxable Retail Sales Approach

Pop. Growth	Pop. 2022	Pop. 2035	2022 Additional Retail Space			2035 Additional Retail Space		
			Current Retail Pull Factor	Target Retail Pull Factor	Target Retail Pull Factor	Current Retail Pull Factor	Target Retail Pull Factor	Target Retail Pull Factor
			35%	40%	53%	35%	40%	53%
1.1%	12,311	13,569	17,900	51,300	84,700	51,800	90,200	128,600
1.5%	13,868	18,550	25,500	60,100	94,600	75,400	117,300	159,200
2.0%	14,424	20,566	34,900	70,800	106,700	106,200	152,600	199,100

Source: City of Newcastle, 2015; BERK, 2015

Using the 2015 and forecasted 2035 population of 10,940 and 13,569 respectively, the calculated average annual growth rate is 1.08%. Using 1.08% as a variable in the model, alternative population growth rates can be then be selected to develop comparative ranges of additional retail space. In the scenario presented above, increased retail pull factors have been used as a variable to show comparative ranges of future retail space to highlight scenarios where Newcastle increases its relative retail market share.

For Newcastle, using the current retail sector pull factor of 0.35 (see **Error! Reference source not found.**) and the projected annual population growth rate of 1.08%, a range between 17,900 and 51,800 square feet of future additional retail space is estimated between 2022 and 2035.

**2) Supportable Retail Space Approach:** The retail space approach assumes that the entirety of a community’s retail needs are met within the boundaries of the modeled jurisdiction. In other words, the model assumes that residents of a given community are making all of their retail purchases within the jurisdiction and not traveling outside the community to meet those needs. The model then estimates the amount of square footage needed to support and house this level of modeled supportable retail activity. For example, if Newcastle residents made 100% of their retail purchases within Newcastle, there would be an estimated 967,100 square feet of gross supportable built retail space.

A current retail space capture rate is then calculated by dividing the *existing* amount of built retail space by the amount of the modeled, gross supportable retail space in a community. Reflecting the reality of Newcastle’s retail picture whereby many Newcastle residents shop outside the City to meet their retail needs, Newcastle’s approximately 153,000 square feet of existing retail space represents a current retail space capture rate of 16% as shown in Exhibit 43.

### Exhibit 43. Future Additional Retail Space - Supportable Retail Space Approach

			Current Cumulative Retail Space Supported by Population			Future Cumulative Retail Space Supported by Population		
Population			Gross Supportable Retail SF	Current Retail SF	Net Supportable Retail SF	Current Retail Space Capture Rate	Target Retail Space Capture Rate	Target Retail Space Capture Rate
<b>City of Newcastle</b>	<b>Growth</b>	<b>Total</b>				<b>16%</b>	<b>18%</b>	<b>21%</b>
Population, 2015		10,940	967,100	152,900	814,200	0	24,200	48,400
Growth, 2016-2022	1,371	12,311	1,088,300		1,088,300	19,200	46,400	73,600
Growth, 2023-2035	1,258	13,569	1,199,500		1,199,500	36,700	66,700	96,700
<b>Total, 2035</b>	<b>2,629</b>	<b>13,569</b>	<b>1,199,500</b>		<b>1,199,500</b>	<b>36,700</b>	<b>66,700</b>	<b>96,700</b>

Source: City of Newcastle, 2015; BERK, 2015

Using the current retail space capture rate and forecasted population levels as a baseline, alternative target retail space capture rates can then be used to estimate a range of additional retail space needed to support future populations. For Newcastle, using a target retail space capture rate of 18%, the model suggests that approximately 46,400 square feet will be added by 2022 and a total of 66,700 square feet will be added by 2035.

- 3) **Employment Based Approach:** An alternative model for estimating projected demand for future retail space involves using employment forecasts for the retail sector. In sum, the model estimates future retail space needed based upon changes in retail employment levels over time and applying an estimated amount of square feet required to house each new employee. This model differs from the other two models in that its focus is completely future forward. Estimates for future retail space demands based upon gains in retail employment are shown in Exhibit 44 below.

**Exhibit 44. Additional Retail Space Estimates Based on Employment Forecasts**

Forecast Gains by Sector	2022	2035
Retail and Restaurants	15	44
<b>Additional Future Retail Space</b>	<b>7,500</b>	<b>22,000</b>

Source: City of Newcastle, 2015; PSRC Land Use Target Forecasts, 2013

Using PSRC employment forecasts and City data, Newcastle is forecasted to gain an additional 15 jobs by 2022 and 44 jobs by 2035 in the retail and restaurant sector. Using the PSRC assumption of 500 square feet per additional retail space per employee, the gain in additional jobs translates to an estimated additional 7,500 to 22,000 square feet of future additional retail space.

## Other Non-Residential Sectors

Unlike the retail and restaurant economic sector, robust baseline square footage estimates for existing built space were not readily available at the sector level for other non-residential economic sectors. As a result, the forecasted employment approach was used as a means to estimate additional space demands for these sectors.

As in the retail employment based approach, the model estimates future non-residential space based upon changes in employment levels over time and across sectors. A baseline factor of the amount of square feet required to house each new employee per sector is then applied. Estimates for future non-residential space demands based upon gains in employment are shown in Exhibit 45. The model suggests that approximately 27,700 additional square feet will be added by 2022 and a total of 82,200 square feet by 2035.

**Exhibit 45. Additional Non-residential Space Estimates Based on Employment Forecasts**

Forecast Gains by Sector	Additional Jobs		Additional Square Footage	
	2022	2035	2022	2035
Services and Finance and Real Estate	47	138	11,800	34,500
Retail and Restaurants	15	44	7,500	22,000
WTU	9	27	5,400	16,200
Construction/Resource	9	28	1,800	5,600
Education	4	12	1,200	3,600
Government	0	1	0	300
<b>Total Employment</b>	<b>84</b>	<b>250</b>	<b>27,700</b>	<b>82,200</b>

Source: City of Newcastle, 2015; PSRC Land Use Target Forecasts, 2013

## Opportunities to Increase Market Share

In the near term, opportunities for Newcastle to increase market share will be limited. As commercial tenants change there is some opportunity for new businesses to increase the City's market in certain sectors, such as restaurants. However, the long term opportunity for the City to increase market share is through making progress towards the high-quality built environment and walkable downtown envisioned in the CBC plan. Improving public spaces, streets, and infrastructure while facilitating redevelopment of underutilized properties and improving the overall attractiveness of Downtown Newcastle is the best opportunity to attract new customers to the area. While the area surrounding Newcastle is saturated with regional shopping destinations that are difficult to compete with, the strategic market opportunity for Newcastle is to provide a retail and service environment based on high quality design, active public spaces, events, public facilities, and pedestrian amenities that define a true "Downtown." These improvements would allow Newcastle to differentiate itself from surrounding regional retail centers, to capitalize on the high traffic volumes by giving people a reason to stop, and to improve on the attractiveness of Newcastle as a place to live with diverse housing choices and urban amenities. City policies that should be considered to increase Newcastle's market share include:

- Update the CBC Plan focused on rebranding the effort as a Downtown Plan
- Actively pursue public/private partnerships for future development opportunities.
- Advocate for improved transit service.
- Develop a detailed capital improvement plan as part of the CBC plan update along with concept designs to attract support for local and outside funding sources including:
  - Streets
  - Public Parking

- Parks, Plaza's, and Open Spaces
- Pedestrian amenities including wayfinding
- Infrastructure (as needed)
- Financing Plan
- Support the establishment of a Downtown Business Association that can serve as a long-lasting partner with the City in the transformation of the Downtown consistent with the community's vision.

## APPENDICES

### PSRC Employment Sector Descriptions

Source: Puget Sound Regional Council, 2015

PSRC major sector categories combine NAICS categories as follows:

**Construction and Resources (Const/Res):** 11, 21, 23

**Finance, Insurance and Real Estate (FIRE):** 52, 53

**Manufacturing:** 31-33

**Retail:** 44, 45

**Services:** 51, 54-56, 61 (private-sector portion), 62, 71, 72, 81

**Wholesale Trade, Transportation, and Utilities (WTU):** 22, 42, 48, 49

**Government:** Public-sector employment, excluding education

**Education:** 61 (public-sector portion)

### Taxable Retail Sales & Person-Expenditures: NAICS Industry Classes

**Exhibit 46. Taxable Retail Sales Sector Classes**

NAICS	Original Industry Title	TRS Industry
441	Motor Vehicle and Parts Dealers	Autos and Parts
442	Furniture and Home Furnishings Stores	Furniture/Furnishings
443	Electronics and Appliance Stores	Electronics/Appliances
444	Building Material and Garden Equipment and Supplies Dealers	Bldg. Material/Garden Supply
445	Food and Beverage Stores	Groceries/Liquor
446	Health and Personal Care Stores	Health/Personal Care
447	Gasoline Stations	Gas Stations
448	Clothing and Clothing Accessories Stores	Apparel/Accessories
451	Sporting Goods, Hobby, Book, and Music Stores	Sports/Books/Music
452	General Merchandise Stores	Gen. Merchandise
453	Miscellaneous Store Retailers	Misc. Retail
454	Nonstore Retailers	Nonstore Retail
722	Food Services and Drinking Places	Restaurants/Catering

Source: BERK, 2015

## NAICS Categories & Subsector Listings

Source: [Bureau of Labor Statistics](#), U.S. Department of Labor, 2015

2-Digit NAICSs categories are as follows:

### 11 - Agriculture, Forestry, Fishing and Hunting

The Agriculture, Forestry, Fishing and Hunting sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats.

The establishments in this sector are often described as farms, ranches, dairies, greenhouses, nurseries, orchards, or hatcheries. A farm may consist of a single tract of land or a number of separate tracts which may be held under different tenures. For example, one tract may be owned by the farm operator and another rented. It may be operated by the operator alone or with the assistance of members of the household or hired employees, or it may be operated by a partnership, corporation, or other type of organization. When a landowner has one or more tenants, renters, croppers, or managers, the land operated by each is considered a farm.

The agriculture, forestry, fishing and hunting sector consists of these subsectors:

- [Crop Production: NAICS 111](#)
- [Animal Production: NAICS 112](#)
- [Forestry and Logging: NAICS 113](#)
- [Fishing, Hunting and Trapping: NAICS 114](#)
- [Support Activities for Agriculture and Forestry: NAICS 115](#)

### 21 – Mining

The Mining sector comprises establishments that extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas. The term mining is used in the broad sense to include quarrying, well operations, beneficiating (e.g., crushing, screening, washing, and flotation), and other preparation customarily performed at the mine site, or as a part of mining activity.

The mining, quarrying, and oil and gas extraction sector consists of these subsectors:

- [Oil and Gas Extraction: NAICS 211](#)
- [Mining \(except Oil and Gas\): NAICS 212](#)
- [Support Activities for Mining: NAICS 213](#)

### 22 – Utilities

The Utilities sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal. Within this sector, the specific activities associated with the utility services provided vary by utility: electric power includes generation, transmission, and distribution; natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage treatment facilities.

The utilities sector consists of a single subsector, Utilities: NAICS 221. Data published under either the sector or subsector classification are included in the tables below. The subsector consists of these industry groups:

- Electric Power Generation, Transmission and Distribution: NAICS 2211
- Natural Gas Distribution: NAICS 2212
- Water, Sewage and Other Systems: NAICS 2213

## 23 – Construction

The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector.

Construction work done may include new work, additions, alterations, or maintenance and repairs. Activities of these establishments generally are managed at a fixed place of business, but they usually perform construction activities at multiple project sites. Production responsibilities for establishments in this sector are usually specified in (1) contracts with the owners of construction projects (prime contracts) or (2) contracts with other construction establishments (subcontracts).

The construction sector consists of these subsectors:

- [Construction of Buildings: NAICS 236](#)
- [Heavy and Civil Engineering Construction: NAICS 237](#)
- [Specialty Trade Contractors: NAICS 238](#)

## 31-33 – Manufacturing

The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products.

Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home and those engaged in selling to the general public products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector. Manufacturing establishments may process materials or may contract with other establishments to process their materials for them. Both types of establishments are included in manufacturing.

The manufacturing sector consists of these subsectors:

- [Food Manufacturing: NAICS 311](#)
- [Beverage and Tobacco Product Manufacturing: NAICS 312](#)
- [Textile Mills: NAICS 313](#)
- [Textile Product Mills: NAICS 314](#)
- [Apparel Manufacturing: NAICS 315](#)
- [Leather and Allied Product Manufacturing: NAICS 316](#)

- [Wood Product Manufacturing: NAICS 321](#)
- [Paper Manufacturing: NAICS 322](#)
- [Printing and Related Support Activities: NAICS 323](#)
- [Petroleum and Coal Products Manufacturing: NAICS 324](#)
- [Chemical Manufacturing: NAICS 325](#)
- [Plastics and Rubber Products Manufacturing: NAICS 326](#)
- [Nonmetallic Mineral Product Manufacturing: NAICS 327](#)
- [Primary Metal Manufacturing: NAICS 331](#)
- [Fabricated Metal Product Manufacturing: NAICS 332](#)
- [Machinery Manufacturing: NAICS 333](#)
- [Computer and Electronic Product Manufacturing: NAICS 334](#)
- [Electrical Equipment, Appliance, and Component Manufacturing: NAICS 335](#)
- [Transportation Equipment Manufacturing: NAICS 336](#)
- [Furniture and Related Product Manufacturing: NAICS 337](#)
- [Miscellaneous Manufacturing: NAICS 339](#)

## 42 - Wholesale Trade

The Wholesale Trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing.

The wholesaling process is an intermediate step in the distribution of merchandise. Wholesalers are organized to sell or arrange the purchase or sale of (a) goods for resale (i.e., goods sold to other wholesalers or retailers), (b) capital or durable nonconsumer goods, and (c) raw and intermediate materials and supplies used in production.

Wholesalers sell merchandise to other businesses and normally operate from a warehouse or office. These warehouses and offices are characterized by having little or no display of merchandise. In addition, neither the design nor the location of the premises is intended to solicit walk-in traffic. Wholesalers do not normally use advertising directed to the general public. Customers are generally reached initially via telephone, in-person marketing, or by specialized advertising that may include Internet and other electronic means. Follow-up orders are either vendor-initiated or client-initiated, generally based on previous sales, and typically exhibit strong ties between sellers and buyers. In fact, transactions are often conducted between wholesalers and clients that have long-standing business relationships.

The wholesale trade sector consists of these subsectors:

- [Merchant Wholesalers, Durable Goods: NAICS 423](#)
- [Merchant Wholesalers, Nondurable Goods: NAICS 424](#)
- [Wholesale Electronic Markets and Agents and Brokers: NAICS 425](#)



## 44-45 - Retail Trade

The Retail Trade sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers: store and nonstore retailers.

1. **Store retailers** operate fixed point-of-sale locations, located and designed to attract a high volume of walk-in customers. In general, retail stores have extensive displays of merchandise and use mass-media advertising to attract customers. They typically sell merchandise to the general public for personal or household consumption, but some also serve business and institutional clients. In addition to retailing merchandise, some types of store retailers are also engaged in the provision of after-sales services, such as repair and installation.

2. **Nonstore retailers**, like store retailers, are organized to serve the general public, but their retailing methods differ. The establishments of this subsector reach customers and market merchandise with methods, such as the broadcasting of "infomercials," the broadcasting and publishing of direct-response advertising, the publishing of paper and electronic catalogs, door-to-door solicitation, in-home demonstration, selling from portable stalls (street vendors, except food), and distribution through vending machines.

The retail trade sector consists of these subsectors:

- [Motor Vehicle and Parts Dealers: NAICS 441](#)
- [Furniture and Home Furnishings Stores: NAICS 442](#)
- [Electronics and Appliance Stores: NAICS 443](#)
- [Building Material and Garden Equipment and Supplies Dealers: NAICS 444](#)
- [Food and Beverage Stores: NAICS 445](#)
- [Health and Personal Care Stores: NAICS 446](#)
- [Gasoline Stations: NAICS 447](#)
- [Clothing and Clothing Accessories Stores: NAICS 448](#)
- [Sporting Goods, Hobby, Book, and Music Stores: NAICS 451](#)
- [General Merchandise Stores: NAICS 452](#)
- [Miscellaneous Store Retailers: NAICS 453](#)
- [Nonstore Retailers: NAICS 454](#)

## 48-49 - Transportation and Warehousing

The Transportation and Warehousing sector includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road, and pipeline.

The transportation and warehousing sector consists of these subsectors:

- [Air Transportation: NAICS 481](#)
- [Rail Transportation: NAICS 482](#)

- [Water Transportation: NAICS 483](#)
- [Truck Transportation: NAICS 484](#)
- [Transit and Ground Passenger Transportation: NAICS 485](#)
- [Pipeline Transportation: NAICS 486](#)
- [Scenic and Sightseeing Transportation: NAICS 487](#)
- [Support Activities for Transportation: NAICS 488](#)
- [Postal Service: NAICS 491](#)
- [Couriers and Messengers: NAICS 492](#)
- [Warehousing and Storage: NAICS 493](#)

## **51 - Information**

The Information sector comprises establishments engaged in the following processes: (a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data.

The main components of this sector are the publishing industries, including software publishing, and both traditional publishing and publishing exclusively on the Internet; the motion picture and sound recording industries; the broadcasting industries, including traditional broadcasting and those broadcasting exclusively over the Internet; the telecommunications industries; Web search portals, data processing industries, and the information services industries.

The Information sector groups three types of establishments: (1) those engaged in producing and distributing information and cultural products; (2) those that provide the means to transmit or distribute these products as well as data or communications; and (3) those that process data.

The information sector consists of these subsectors:

- [Publishing Industries \(except Internet\): NAICS 511](#)
- [Motion Picture and Sound Recording Industries: NAICS 512](#)
- [Broadcasting \(except Internet\): NAICS 515](#)
- [Telecommunications: NAICS 517](#)
- [Data Processing, Hosting, and Related Services: NAICS 518](#)
- [Other Information Services: NAICS 519](#)

## **52 - Finance and Insurance**

The Finance and Insurance sector comprises establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions. Three principal types of activities are identified:

1. Raising funds by taking deposits and/or issuing securities and, in the process, incurring liabilities. Establishments engaged in this activity use raised funds to acquire financial assets by making loans and/or purchasing securities. Putting themselves at risk, they channel funds from lenders to borrowers and transform

or repackage the funds with respect to maturity, scale, and risk. This activity is known as financial intermediation.

2. Pooling of risk by underwriting insurance and annuities. Establishments engaged in this activity collect fees, insurance premiums, or annuity considerations; build up reserves; invest those reserves; and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.

3. Providing specialized services facilitating or supporting financial intermediation, insurance, and employee benefit programs.

In addition, monetary authorities charged with monetary control are included in this sector.

The finance and insurance sector consists of these subsectors:

- [Monetary Authorities - Central Bank: NAICS 521](#)
- [Credit Intermediation and Related Activities: NAICS 522](#)
- [Securities, Commodity Contracts, and Other Financial Investments and Related Activities: NAICS 523](#)
- [Insurance Carriers and Related Activities: NAICS 524](#)
- [Funds, Trusts, and Other Financial Vehicles: NAICS 525](#)

### **53 - Real Estate and Rental and Leasing**

The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks.

This sector also includes establishments primarily engaged in managing real estate for others, selling, renting and/or buying real estate for others, and appraising real estate. These activities are closely related to this sector's main activity, and it was felt that from a production basis they would best be included here. In addition, a substantial proportion of property management is self-performed by lessors.

The main components of this sector are the real estate lessors industries (including equity real estate investment trusts (REITs)); equipment lessors industries (including motor vehicles, computers, and consumer goods); and lessors of nonfinancial intangible assets (except copyrighted works).

The real estate and rental and leasing sector consists of these subsectors:

- [Real Estate: NAICS 531](#)
- [Rental and Leasing Services: NAICS 532](#)
- [Lessors of Nonfinancial Intangible Assets \(except Copyrighted Works\): NAICS 533](#)

### **54 - Professional, Scientific and Technical Services**

The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed

include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services.

The professional, scientific, and technical services sector consists of a single subsector, Professional, Scientific, and Technical Services: NAICS 541. Data published under either the sector or subsector classification are included in the tables below. The subsector consists of these industry groups:

- Legal Services: NAICS 5411
- Accounting, Tax Preparation, Bookkeeping, and Payroll Services: NAICS 5412
- Architectural, Engineering, and Related Services: NAICS 5413
- Specialized Design Services: NAICS 5414
- Computer Systems Design and Related Services: NAICS 5415
- Management, Scientific, and Technical Consulting Services: NAICS 5416
- Scientific Research and Development Services: NAICS 5417
- Advertising and Related Services: NAICS 5418
- Other Professional, Scientific, and Technical Services: NAICS 5419

## **55 - Management of Companies and Enterprises**

The Management of Companies and Enterprises sector comprises (1) establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or (2) establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision making role of the company or enterprise. Establishments that administer, oversee, and manage may hold the securities of the company or enterprise.

Establishments in this sector perform essential activities that are often undertaken, in-house, by establishments in many sectors of the economy. By consolidating the performance of these activities of the enterprise at one establishment, economies of scale are achieved.

The management of companies and enterprises sector consists of a single subsector, Management of Companies and Enterprises: NAICS 551. Data published under either the sector or subsector classification are included in the tables below. The subsector consists of a single industry group, Management of Companies and Enterprises: NAICS 5511.

## **56 - Administrative and Support and Waste Management and Remediation Services**

The Administrative and Support and Waste Management and Remediation Services sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include:

office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services.

The administrative and support and waste management and remediation services sector consists of these subsectors:

- [Administrative and Support Services: NAICS 561](#)
- [Waste Management and Remediation Services: NAICS 562](#)

## **61 - Educational Services**

The Educational Services sector comprises establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated. They may also offer food and/or accommodation services to their students.

Educational services are usually delivered by teachers or instructors that explain, tell, demonstrate, supervise, and direct learning. Instruction is imparted in diverse settings, such as educational institutions, the workplace, or the home, and through diverse means, such as correspondence, television, the Internet, or other electronic and distance-learning methods. The training provided by these establishments may include the use of simulators and simulation methods. It can be adapted to the particular needs of the students, for example sign language can replace verbal language for teaching students with hearing impairments. All industries in the sector share this commonality of process, namely, labor inputs of instructors with the requisite subject matter expertise and teaching ability.

The educational services sector consists of a single subsector, Educational Services: NAICS 611. Data published under either the sector or subsector classification are included in the tables below. The subsector consists of these industry groups:

- Elementary and Secondary Schools: NAICS 6111
- Junior Colleges: NAICS 6112
- Colleges, Universities, and Professional Schools: NAICS 6113
- Business Schools and Computer and Management Training: NAICS 6114
- Technical and Trade Schools: NAICS 6115
- Other Schools and Instruction: NAICS 6116
- Educational Support Services: NAICS 6117

## **62 - Health Care and Social Assistance**

The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance. The services provided by establishments in this sector are delivered by trained professionals. All industries in the sector share this commonality of process, namely, labor inputs of health practitioners or social workers

with the requisite expertise. Many of the industries in the sector are defined based on the educational degree held by the practitioners included in the industry.

The health care and social assistance sector consists of these subsectors:

- [Ambulatory Health Care Services: NAICS 621](#)
- [Hospitals: NAICS 622](#)
- [Nursing and Residential Care Facilities: NAICS 623](#)
- [Social Assistance: NAICS 624](#)

## **71 - Arts, Entertainment and Recreation**

The Arts, Entertainment, and Recreation sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises (1) establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; (2) establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and (3) establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests.

Some establishments that provide cultural, entertainment, or recreational facilities and services are classified in other sectors.

The arts, entertainment, and recreation sector consists of these subsectors:

- [Performing Arts, Spectator Sports, and Related Industries: NAICS 711](#)
- [Museums, Historical Sites, and Similar Institutions: NAICS 712](#)
- [Amusement, Gambling, and Recreation Industries: NAICS 713](#)

## **72 - Accommodation and Food Services**

The Accommodation and Food Services sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment.

The accommodation and food services sector consists of these subsectors:

- [Accommodation: NAICS 721](#)
- [Food Services and Drinking Places: NAICS 722](#)

### **722 - Food Services and Drinking Places**

Industries in the Food Services and Drinking Places subsector prepare meals, snacks, and beverages to customer order for immediate on-premises and off-premises consumption. There is a wide range of establishments in these industries. Some provide food and drink only; while others provide various combinations of seating space, waiter/waitress services and incidental amenities, such as limited entertainment. The industries in the subsector are grouped based on the type and level of services provided. The industry groups are full-service restaurants; limited-service eating places; special food services, such as food service contractors, caterers, and mobile food services; and drinking places.

The food services and drinking places subsector consists of these industry groups:

- Full-Service Restaurants: NAICS 7221
- Limited-Service Eating Places: NAICS 7222
- Special Food Services: NAICS 7223
- Drinking Places (Alcoholic Beverages): NAICS 7224

### **81 - Other Services (except Public Administration)**

The Other Services (except Public Administration) sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.

The other services (except public administration) sector consists of these subsectors:

- [Repair and Maintenance: NAICS 811](#)
- [Personal and Laundry Services: NAICS 812](#)
- [Religious, Grantmaking, Civic, Professional, and Similar Organizations: NAICS 813](#)
- [Private Households: NAICS 814](#)