

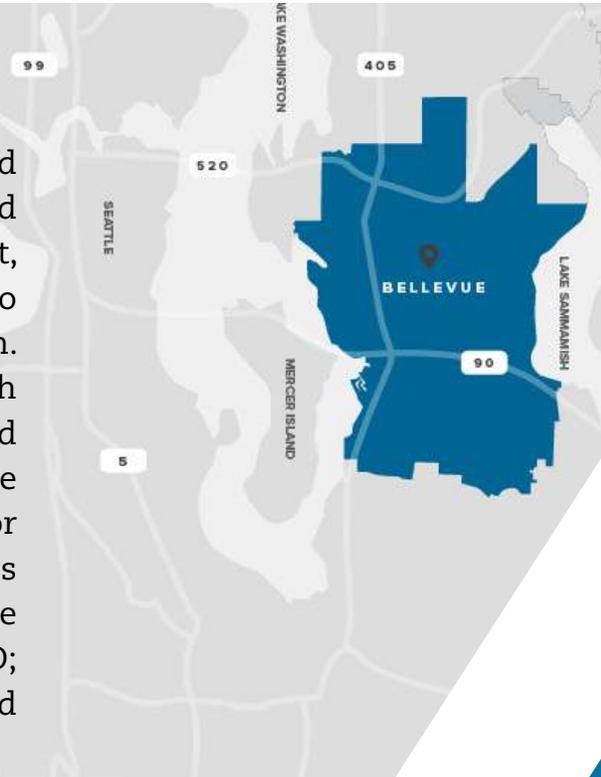
APPENDIX I

ECONOMIC & DEMOGRAPHIC ANALYSIS

Introduction

The following Appendix provides a detailed overview of Bellevue's major economic and demographic characteristics. Throughout, the scan includes benchmark geographies to help provide context to Bellevue's position. In most cases, Bellevue is compared with five communities with similar economic and demographic profiles. Like Bellevue, these benchmark cities are also located in major metropolitan regions. The benchmark cities include Arlington County, VA (In Virginia, the County is equivalent to the City); Boulder, CO; Cambridge, MA; Santa Monica, CA; and Sunnyvale, CA.

Notably, when examining retail and tourism trends, Bellevue is compared to benchmarks within King County, WA. Sales tax data is less readily available in states other than Washington, and the unique structure of sales taxes within each state make it difficult to compare Bellevue to the national benchmarks. As a result, Bellevue's retail position is compared to King County and other cities located within the county. This also provides greater context on what makes Bellevue's retail unique in the region, which is the primary source of shoppers and competition for retail sales.



Similarly, tourism data, such as hotel stays, is locally collected and generally not available to the public. This scan utilizes some data provided by Visit Bellevue but cannot make comparison to other cities within King County or across the country. Instead in these cases, historical trends within Bellevue are examined to better understand how the sector is performing.

It is also important to note that the following examination of employment trends utilizes industry clusters previously defined by the City of Bellevue and consultants. These definitions were used to provide consistency with past economic reporting but also impose limitations. For example, not all employment categories were assigned to industry clusters in these definitions and thus were categorized as ‘Other’ in this report. The Other cluster is notably large and primarily contains employment in Manufacturing, Personal Services, Back Office, and Wholesale Trade.

This does not affect the analysis or strategic directions in this scan or plan update, but it is recommended that in the future, Bellevue update the industry cluster definitions to incorporate all employment categories – removing the need for an Other category. This would ensure all industries are fully captured in the analysis and would also ease the collection and presentation of data going forward.



Bellevue



Arlington



Boulder



Cambridge



Santa Monica



Sunnyvale

“

“Bellevue’s overall economy is growing rapidly. Between 2013 and 2018, employment in Bellevue increased by more than 17,500 jobs.”

OVERALL

Employment Growth

Bellevue's overall economy is growing rapidly. Between 2013 and 2018, employment in Bellevue increased by more than 17,500 jobs – a gain of 14.2%.

On an absolute basis, Bellevue created the most jobs among the benchmark cities – followed by Cambridge (15,600), Arlington (13,100), and Sunnyvale (11,100).

On a proportional basis, employment growth in Bellevue outpaced the US average and all benchmarked communities, except Cambridge, which saw 16.6% job growth over the same period.

Figure 1. Employment Growth, 2013 – 2018

Source: Avalanche Consulting / Puget Sound Regional Council / EMSI



Income

In 2018, median household income in Bellevue approached \$114,000. Nationally, median household income is less than \$62,000.

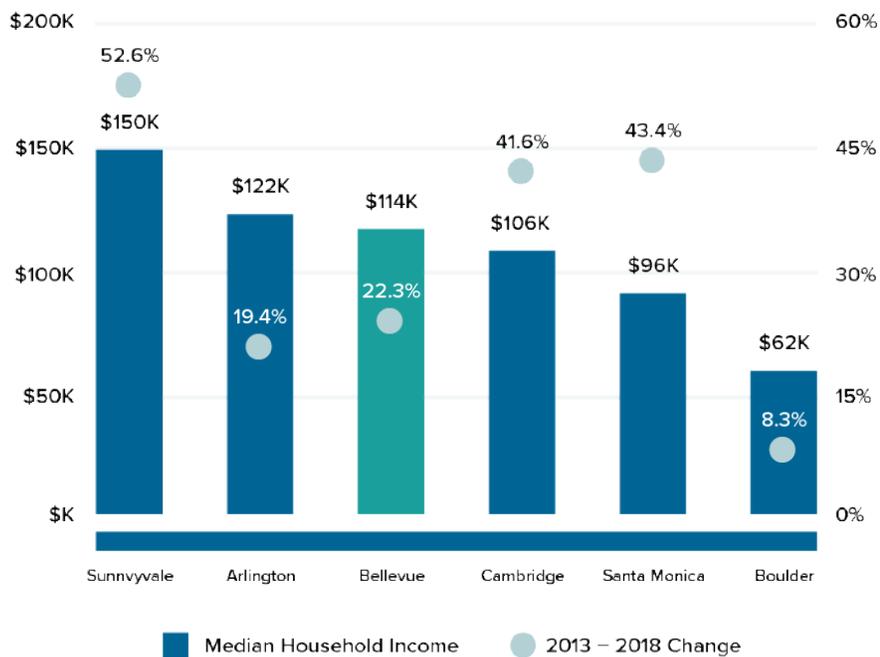
Median household income levels in all benchmark communities are substantially higher than the US average – excepting Boulder, which has a high concentration of students who earn little or no income.

At more than \$150,000 and \$122,000 respectively, Sunnyvale and Arlington County have the highest household income levels.

Since 2013, median household income in Bellevue grew 22%. While this growth exceeded the US average, Sunnyvale, Cambridge, and Santa Monica all saw greater gains in household income.

Figure 2. Median Household Income, 2018

Source: Avalanche Consulting / US Census Bureau



Poverty

In 2018, nearly 8% of Bellevue residents lived below the federal poverty line. This was roughly five percentage points less than the national average.

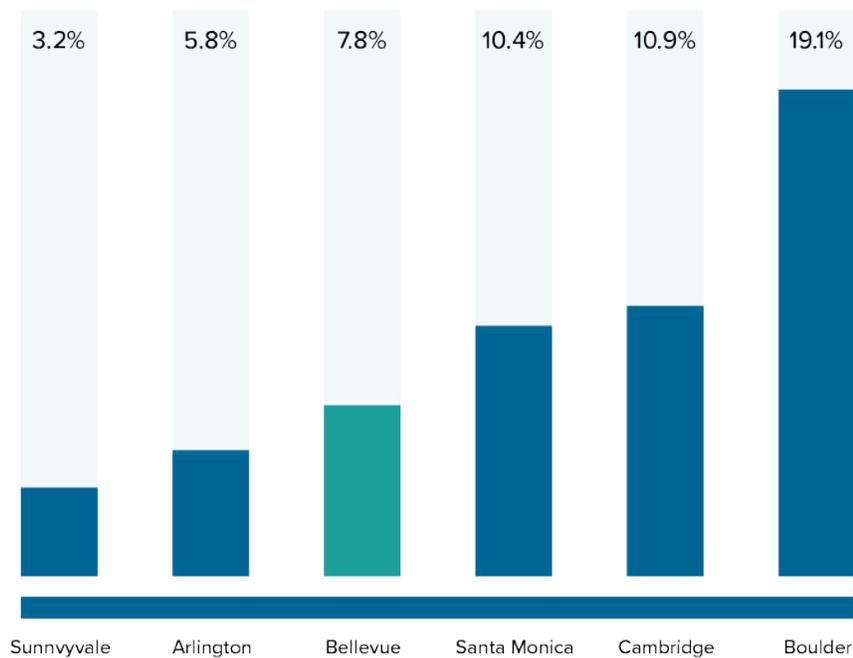
Both local and national poverty rates have steadily declined in recent years.

Among benchmark regions, only Sunnyvale and Arlington County have lower poverty rates. At just 3.2%, the percentage of Sunnyvale residents living in poverty is among the lowest in the US.

High poverty rates (19%) in Boulder are largely distorted by the high concentration of students in the city, who as adults without income are considered in poverty.

Figure 3. Poverty Rate, 2018

Source: Avalanche Consulting / US Census Bureau



“Both local and national poverty rates have steadily declined in recent years.”

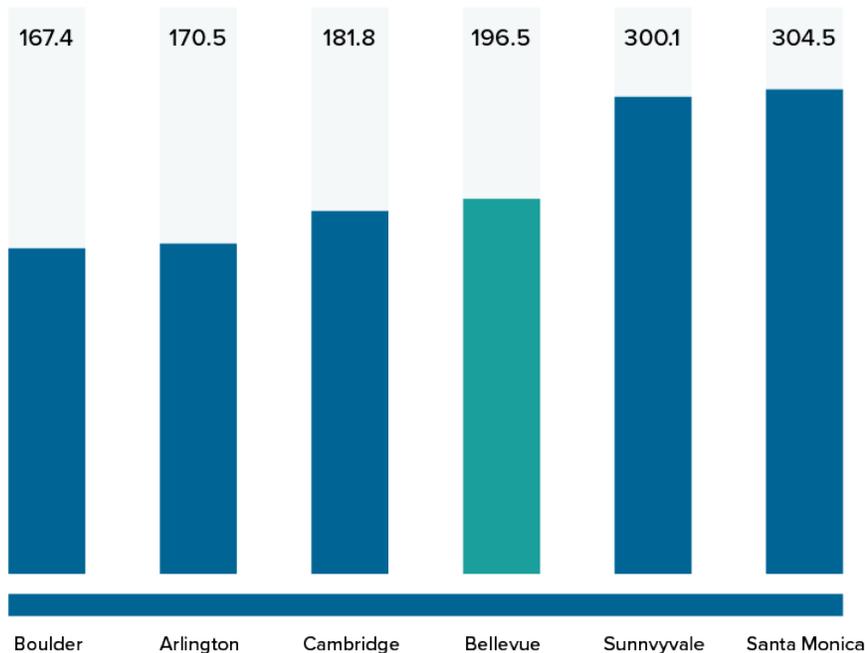
Affordability

Bellevue is nearly twice as expensive as the US average – with an overall cost of living index (COLI) rating of 196.5. This index takes into account the price of Housing, Groceries, Transportation, Health, Utilities, and Miscellaneous other cost factors. Bellevue is more expensive overall than Seattle, which has a COLI rating of 172, King County (159), and the state of Washington (118).

Among the benchmarks examined, Bellevue is more expensive than Boulder (167), Arlington (171), and Cambridge (182). The two California benchmarks – Sunnyvale and Santa Monica – are significantly more expensive at 300 and 305 respectively. Most of this additional expense is due to exceptionally high housing costs.

Figure 4. Cost of Living Index (COLI) – Overall Rating (100 = National Average, Higher is more Expensive),

Source: Avalanche Consulting / Sperling's Best Places



Office Real Estate

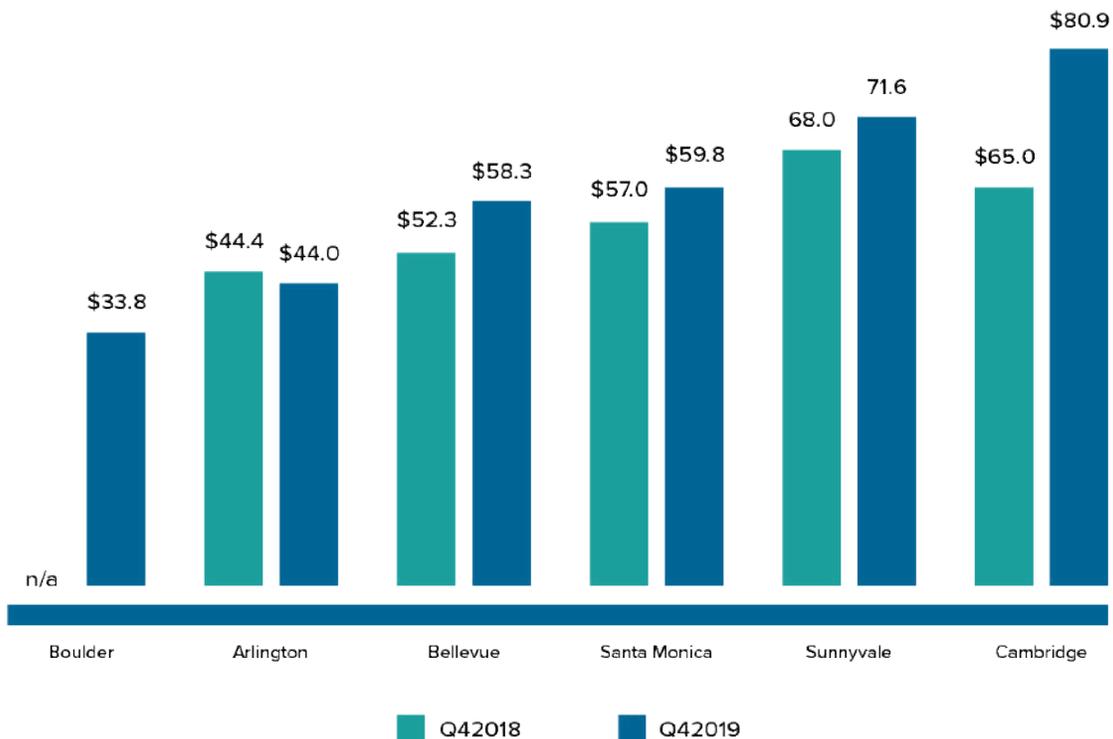
Bellevue has been adding office inventory at a rapid pace in recent years, but this space is in high demand and the price continues to rise.

In Q4 2019, the average asking price for Class A office space in Bellevue was \$58.3 per square foot – less than in Santa Monica (\$59.8), Sunnyvale (\$71.6) and Cambridge (\$80.9), but greater than the Seattle Central Business District (\$55.5).

Between Q4 2018 and Q4 2019, the average asking price for Class A office space in Bellevue rose 12% – a faster rate of growth than all benchmarks except Cambridge, which saw a 25% increase in cost.

Figure 5. Average Asking Rent for Class A Office Space

Source: Avalanche Consulting / Colliers / Cushman Wakefield



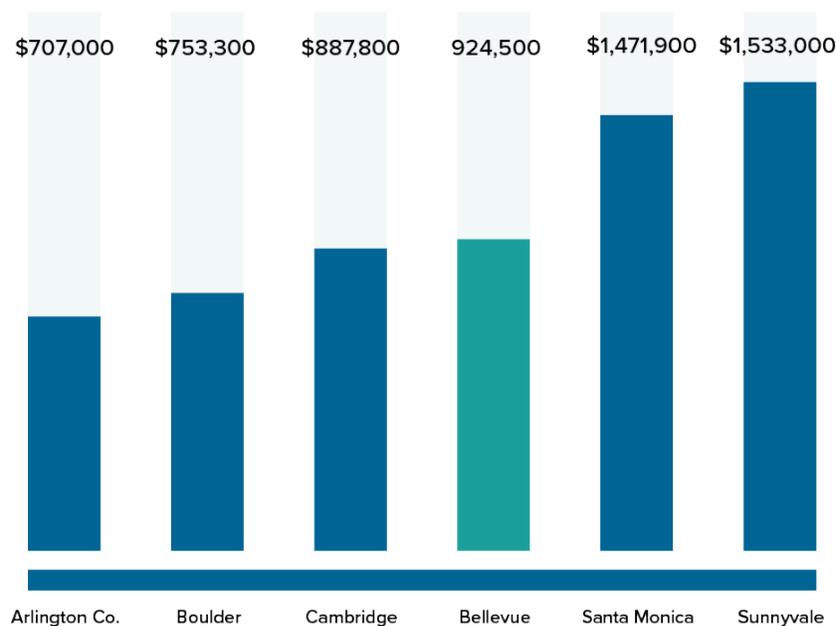
Home Values

In 2018, the median home value in Bellevue reached \$924,500 – 46% higher than King County (\$635,200) and 22% higher than Seattle (\$758,200). This is also three times more than the US median home value (\$229,700).

Among Bellevue’s benchmarks, Arlington (\$707,000), Boulder (\$753,300), and Cambridge (\$887,800) all have less expensive homes, but Santa Monica and Sunnyvale are significantly more expensive, with median home values of \$1,471,900 and \$1,533,000 respectively.

Figure 6. Median Home Value, 2018

Source: Avalanche Consulting / US Census Bureau



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“In 2018, the median home value in Bellevue reached \$924,500.”

Rental Costs

Rent in Bellevue is relatively more affordable than homes for purchase. In 2018, median rent in Bellevue was \$2,051 – 23% higher than King County (\$1,674) and 21% higher than Seattle (\$1,699). This was also 94% higher than the US median rent (\$1,058).

Among Bellevue’s benchmarks, Boulder (\$1,516), Santa Monica (\$1,795), and Arlington (\$1,924) had lower rental costs. Interestingly, home values in Santa Monica are exorbitant but rents are relatively low – this is due to rental units being much more common than owner-occupied units. In Santa Monica, 73% of all housing units are rentals. In contrast, only 47% of housing units are rented in Bellevue.

Cambridge (\$2,350) and Sunnyvale (\$2,580) both have higher median rents than Bellevue.

Figure 7. Median Rent, 2018

Source: Avalanche Consulting / US Census Bureau



Housing Affordability

Homeowners and renters are considered “cost burdened” if housing expenses consume 30% or more of household income. In general, renters are more likely to be costburdened than homeowners.

Approximately 35% of Bellevue households are cost-burdened. The proportion is slightly higher than in Arlington and Sunnyvale, but lower than in Cambridge, Santa Monica, and Boulder. Unlike most other benchmark communities, there is very little difference in the proportions of cost-burdened renters and homeowners in Bellevue. In contrast, renters in locales such as Cambridge and Boulder are more than twice as likely to be cost-burdened relative to their homeownership counterparts.

Figure 8. % of Cost Burdened Homeowners and Renters, 2018

Source: Avalanche Consulting / US Census Bureau



Income Equality

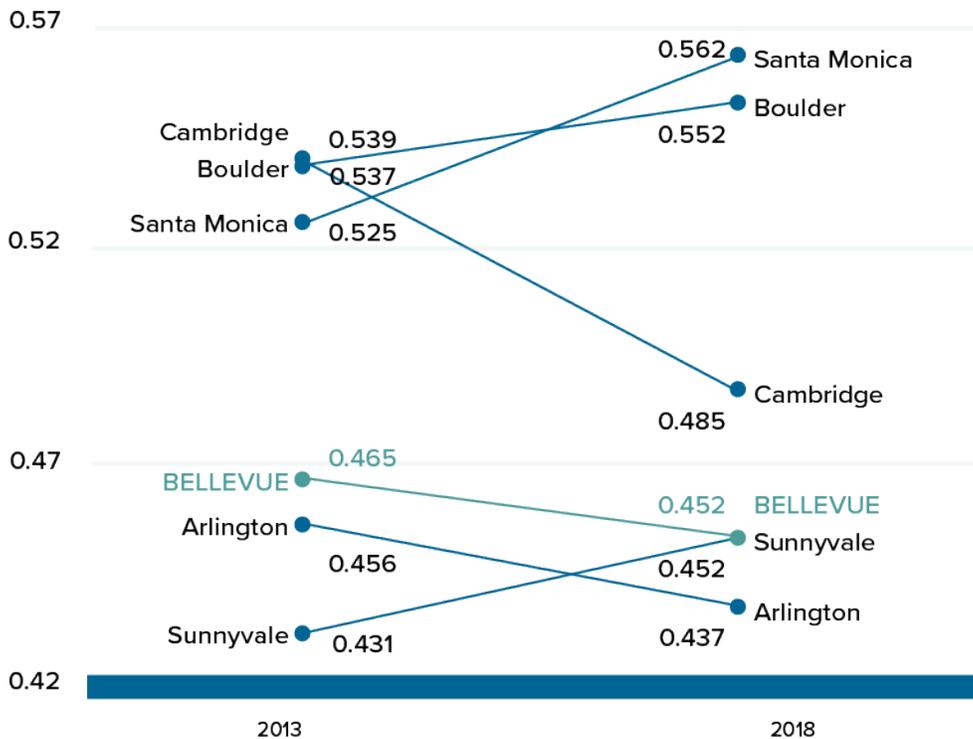
The Gini Index is a measure of income inequality. The Gini coefficient ranges from 0 to 1. A value of 0 reflects absolute equality while a value of 1 indicates absolute inequality.

With a Gini coefficient of 0.452, income inequality in Bellevue is less than the national average and all benchmark communities except Sunnyvale and Arlington.

Notably, the Gini index fell in Bellevue over the past five years – meaning that incomes became more equal. Among benchmark communities, only Cambridge and Arlington similarly saw greater income equality.

Figure 9. Gini Index of Inequality, 2018

Source: Avalanche Consulting / US Census Bureau



Income Equality (continued)

The distribution of household income in a community can also provide an illuminating snapshot of economic inequality.

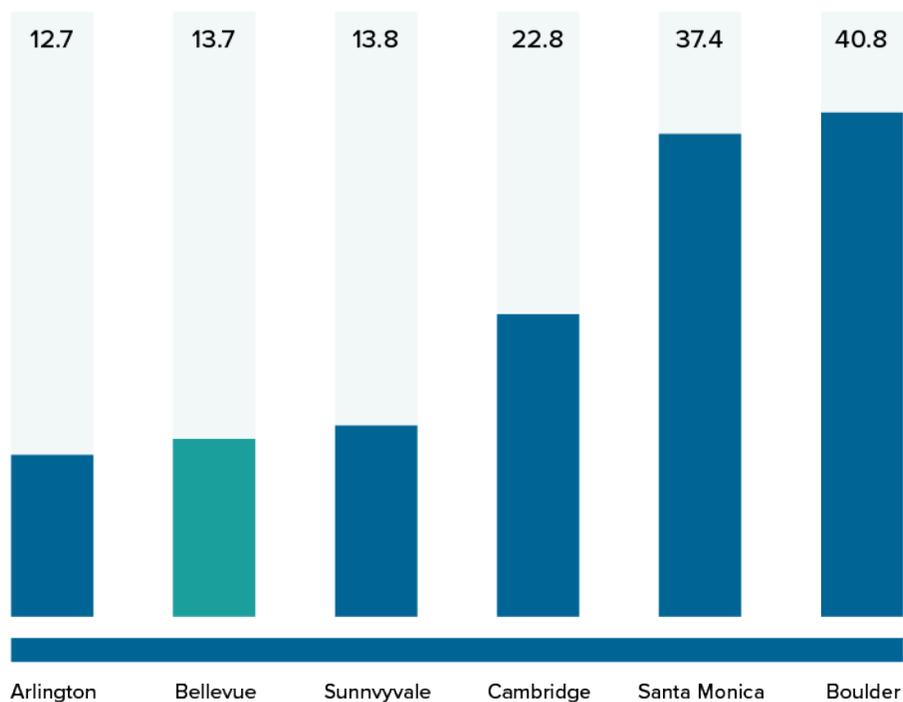
In Bellevue, for example, the top 20% of households captured 49% of all income in the city in 2018. In contrast, the bottom 20% of households in Bellevue accounted for less than 4% of all income in the city.

This represents less income disparity than most of the benchmark cities. In Boulder, for example, the top 20% of households accounted for 57% of all income in the city; the bottom 20% captured less than 2% of all income in Boulder.

Only Arlington had less income disparity than Bellevue – by a small margin.

Figure 10. Ratio of Share of Aggregate Household Income of Top 20% of Households Relative to Bottom 20% of Households , 2018

Source: Avalanche Consulting / US Census Bureau



ECONOMIC RESILIENCE

Employment Growth by Industry

Over the past five years, more than 17,500 new jobs were created in Bellevue. No other benchmark region added as many jobs during this period.

Information Technology created nearly 5,000 jobs – accounting for more than a quarter of the new jobs in Bellevue.

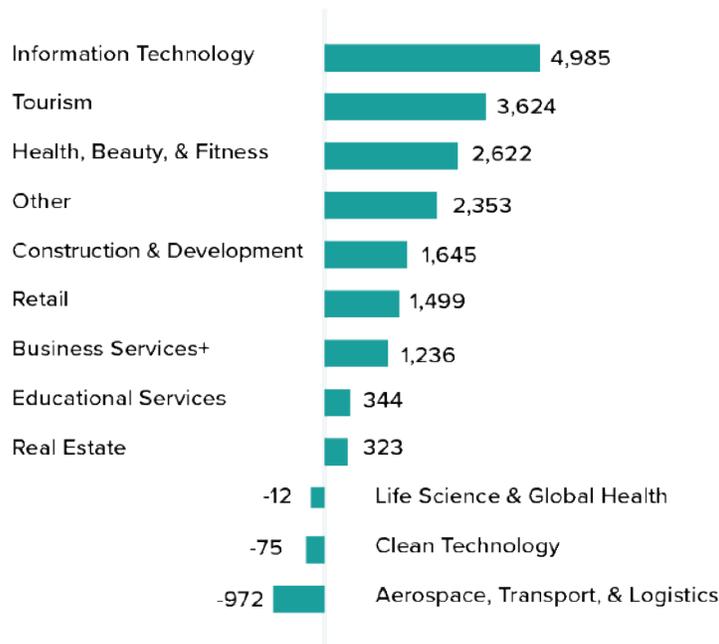
The industries with the next largest employment increases were Tourism (3,600 jobs); Health, Beauty & Fitness (2,600); Construction & Development (1,600); Retail (1,500); and Business Services (1,200).

Over the same time period, Aerospace, Transportation, & Logistics lost nearly 1,000 jobs. Both Life Science & Global Health and Clean Technology employment in Bellevue also dipped slightly.

As noted in the introduction, Other includes a wide range of additional industries – from vehicle maintenance to film production.

Figure 11. Bellevue Employment Change by Major Industry

Source: Avalanche Consulting / Puget Sound Regional Council



Industry Cluster Analysis

Information Technology is by far the most concentrated industry in Bellevue – with a location quotient (LQ) of 7.6 – meaning that on a per job basis, the industry is 7.6 times more concentrated than the US average. On a percentage basis, Information Technology grew 21% in Bellevue from 2013 to 2018.

The next most concentrated industries in Bellevue are Real Estate (2.1 LQ), Clean Technology (1.4 LQ), Business Services (1.3 LQ), and Retail (1.2 LQ).

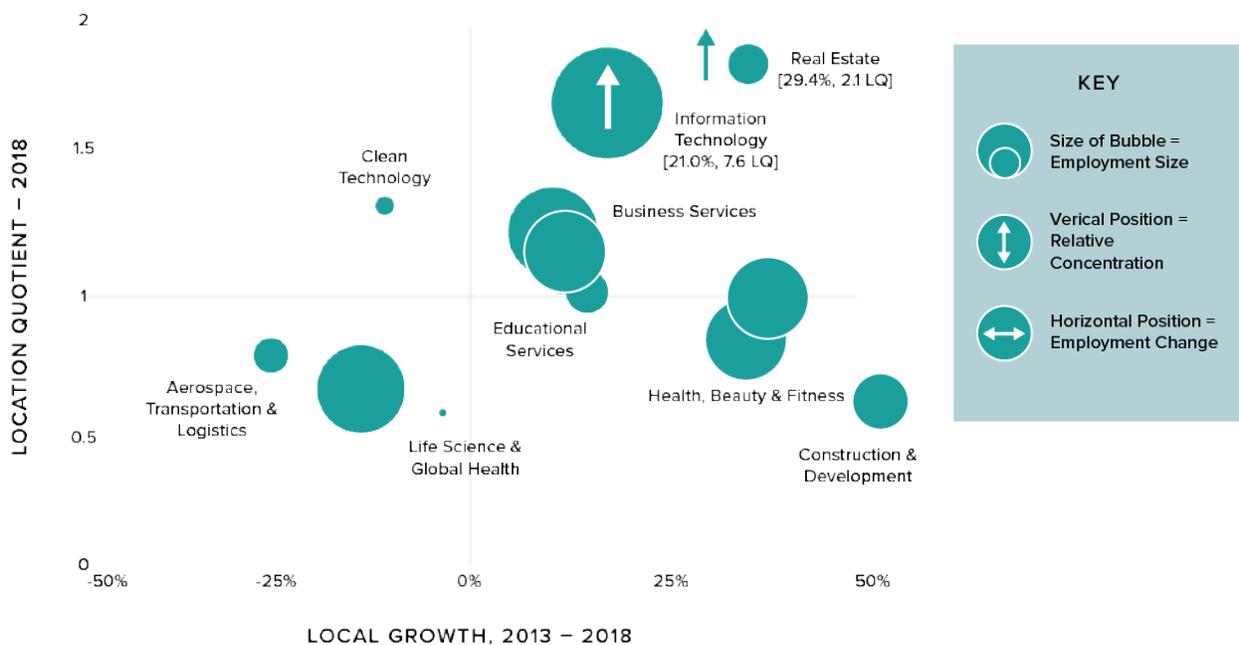
Less concentrated local industries include Life Science & Global Health, which has an LQ of 0.4 LQ – meaning it is 60% less concentrated than the US average – and Aerospace, Transportation, & Logistics (0.5 LQ).

The fastest growing clusters in Bellevue from 2013 to 2018 were Construction & Development (53% growth); Tourism (32%); Health, Beauty, & Fitness (31%); and Real Estate (29%).

The Other cluster is based on previous industry cluster definitions and is notably large. It largely contains employment in Manufacturing, Personal Services, Back Office, and Wholesale Trade. *This does not directly affect the analysis of this scan, but it is recommended that cluster definitions be updated in the future.*

Figure 12. Bellevue Major Industry Cluster by Size, Employment Change & Concentration

Source: Avalanche Consulting / Puget Sound Regional Council



Economic Diversity

Like the concept of biodiversity, economic diversity measures the relative number of jobs in different industries within a community. Cities with large, highly concentrated industry clusters tend to have smaller employment numbers in other clusters – making them less economically diverse.

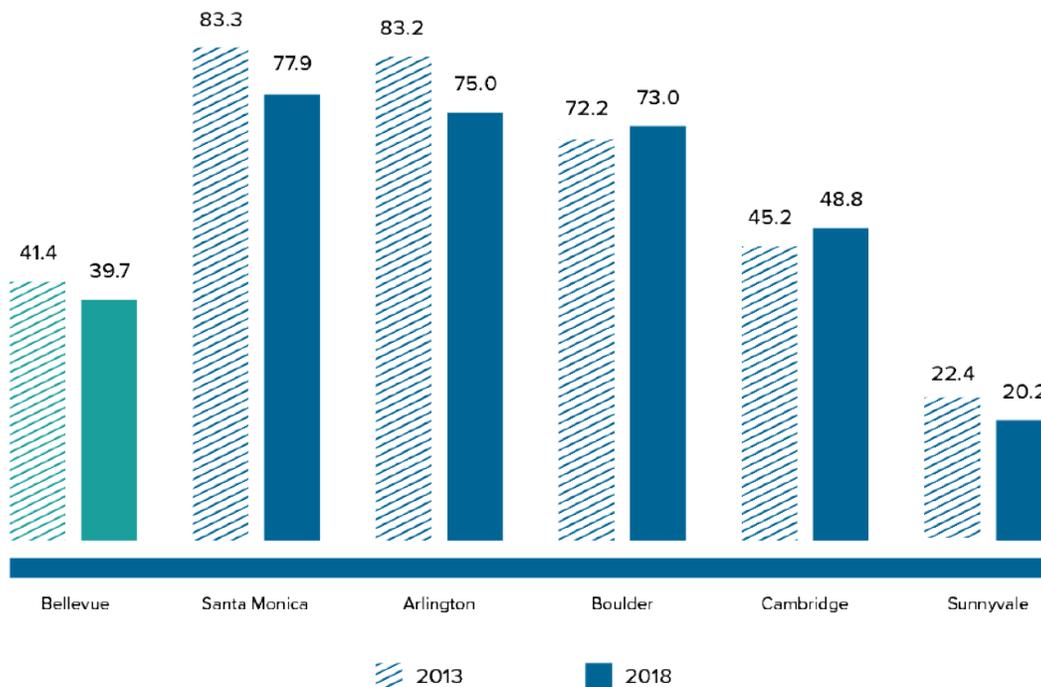
The Economic Diversity Index rates the distribution of industry employment in a community based on a national average distribution of 100 – with less economically diverse areas receiving lower scores.

With an Economic Diversity Index of 39.7, Bellevue is less economically diverse than all benchmark cities except Sunnyvale, CA (20.2).

Between 2013 and 2018, Bellevue became slightly less economically diverse. The decline in economic diversity likely reflects relatively high growth in Information Technology combined with small job losses in other clusters.

Figure 13. Economic Diversity Index (100 = National Average)

Source: Avalanche Consulting / EMSI



Occupational Diversity

The occupational diversity index measures the extent to which the occupations of individuals employed within a city mirror the distribution of occupations across the nation.

Regional economies typically specialize to some extent, but Bellevue’s labor force reveals exceptionally low occupational diversity, with an Occupational Diversity Index rating of 15.6 – compared to a national average distribution of 100.

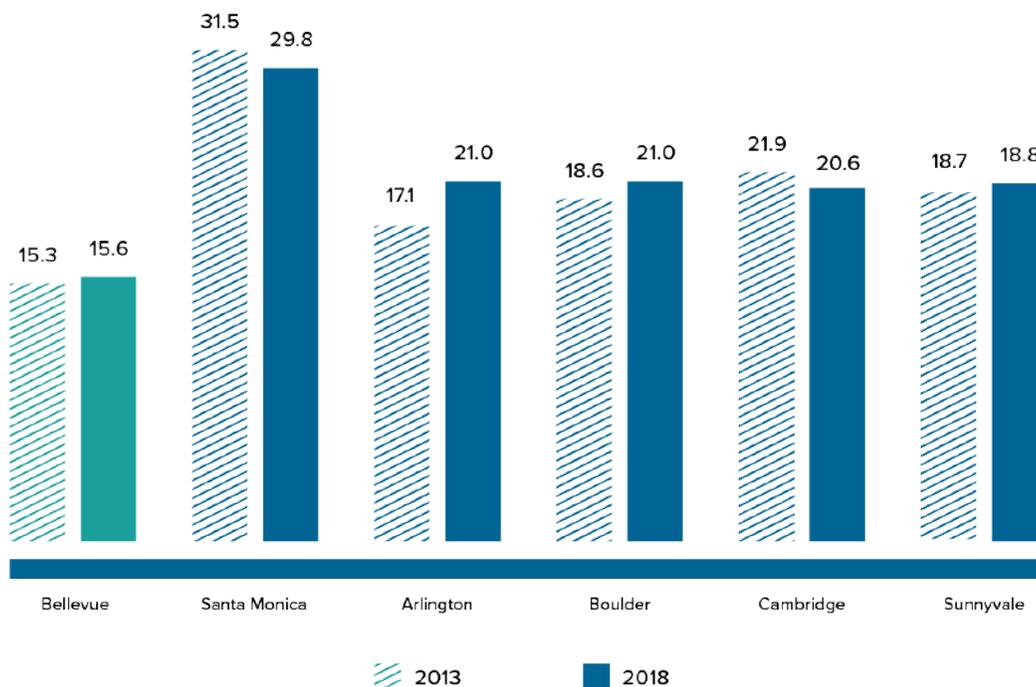
Lack of occupational diversity in Bellevue is largely driven by the high concentration of software developers in the city – a reflection of tremendous local strengths in this field.

Residents of Bellevue alone cannot supply this high concentration of software talent, but local employers are able to pull from the extraordinarily large pool of skilled workers available from across the Seattle region.

Among benchmark cities, Arlington, VA has the highest occupational diversity, with an index of 29.8, and Santa Monica has the lowest relative diversity, with an index of 18.8.

Figure 14. Occupational Diversity Index (100 = National Average)

Source: Avalanche Consulting / EMSI



SMALL BUSINESS & ENTREPRENEURSHIP

Employer Size

In addition to industry diversity, the most economically resilient communities also feature a balance of small and large businesses.

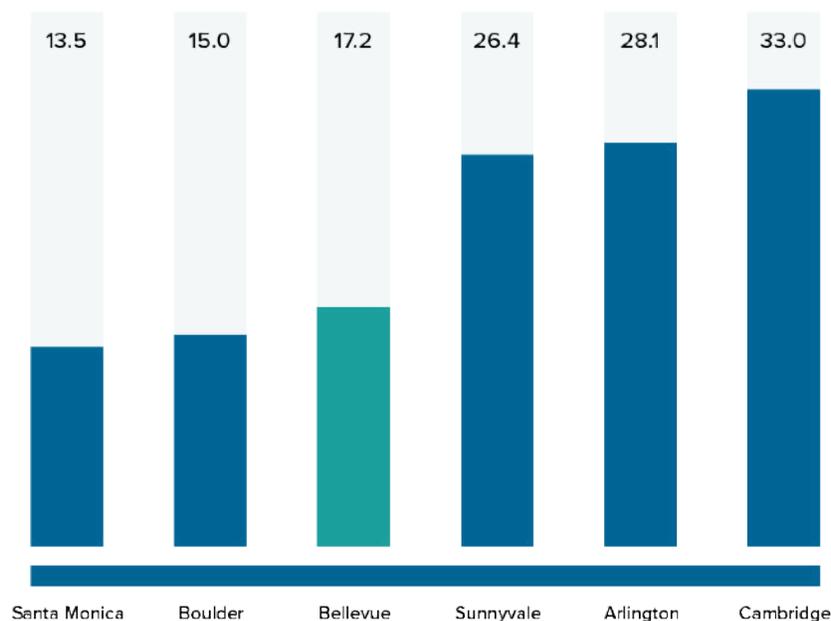
Bellevue is home to several very large companies, but nearly 97% of all firms located in the city have 100 or fewer employees. On average, businesses in Bellevue employ slightly above 17 workers. Cambridge, Sunnyvale, and Arlington County are all home to much larger firms on average.

Although today the average firm size is relatively small in Bellevue compared to its benchmarks, this is likely to grow in coming years. Current expansion plans by companies such as Amazon, REI, and Facebook will likely result in a smaller number of companies accounting for a growing portion of the city's employment.

Note: new business and startup data is not available for cities – only counties, metropolitan statistical areas, and states.

Figure 15. Average Employment Size by Firm, 2016

Source: Avalanche Consulting / US Census Bureau



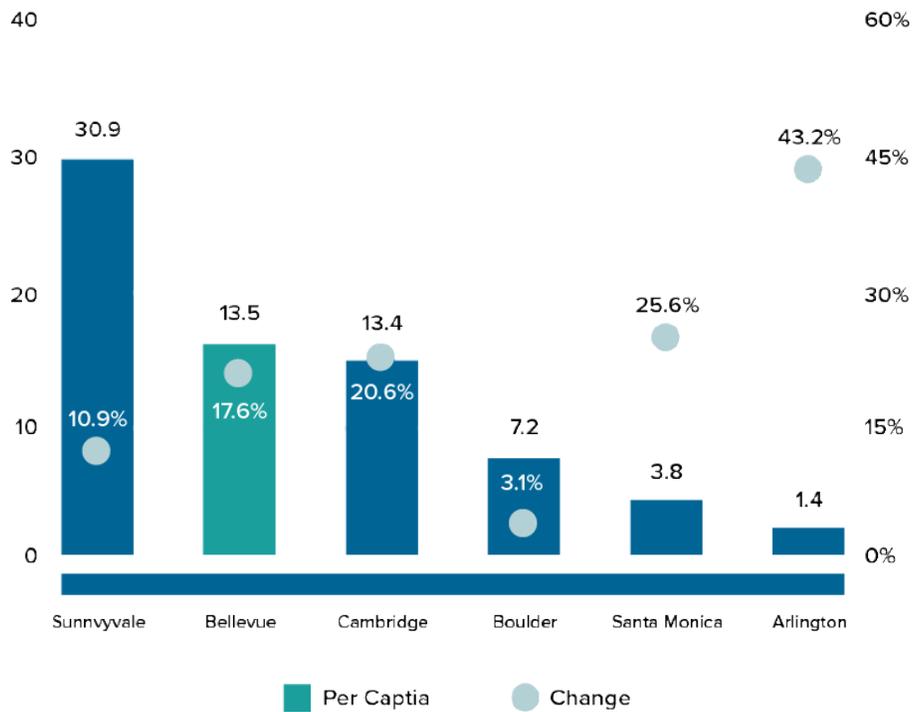
Patent Activity

Bellevue is a highly inventive city. In 2018, individuals living in Bellevue produced 13.5 patents for every 1,000 residents. This was roughly equivalent to Cambridge and a higher share than other benchmark cities, except Sunnyvale, which produced 30.9 per 1,000 residents.

From 2013 to 2018, the number of patents attributed to Bellevue residents rose nearly 18% on a per capita basis.

While communities such as Santa Monica and Arlington saw greater increases in patent production over this period, overall patent activity in both places remains significantly less than in Bellevue.

Figure 16. Patent Activity by Inventor Location, 2018
 Source: Avalanche Consulting / US Patent & Trade Office



Self-Employment

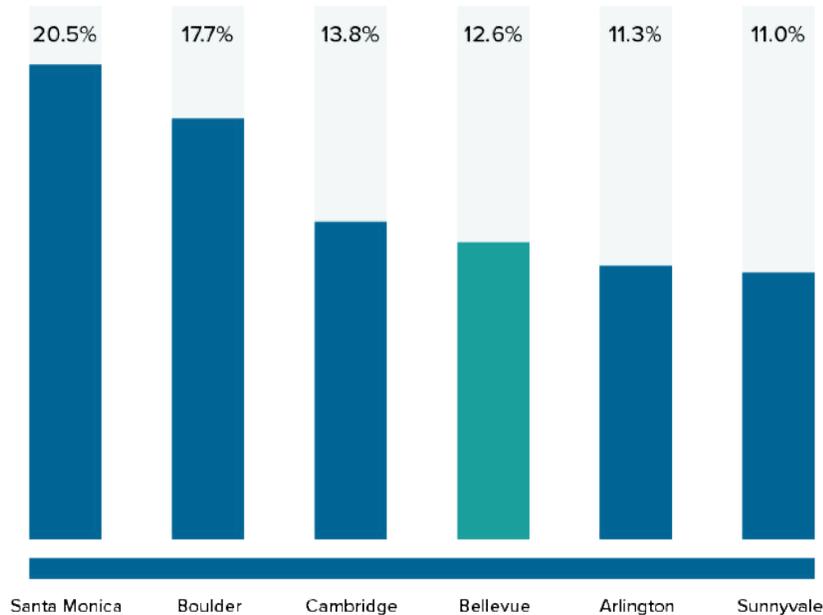
More than 12% of households in Bellevue reported receiving self-employment income in 2018. This could include individuals who own their own businesses or those working in “gig” positions, such as drivers for ridesharing companies.

Among benchmark regions, Bellevue ranks 4th in the proportion of households that reported self-employment income.

At more than 20%, Sunnyvale has the highest share of households within self-employment income. Both Boulder and Cambridge also feature greater proportions of households with self-employment income than Bellevue – at 18% and 14% respectively.

Figure 17. % of Households with Self-Employment Income, 2018

Source: Avalanche Consulting / US Census Bureau



Self-Employment Income

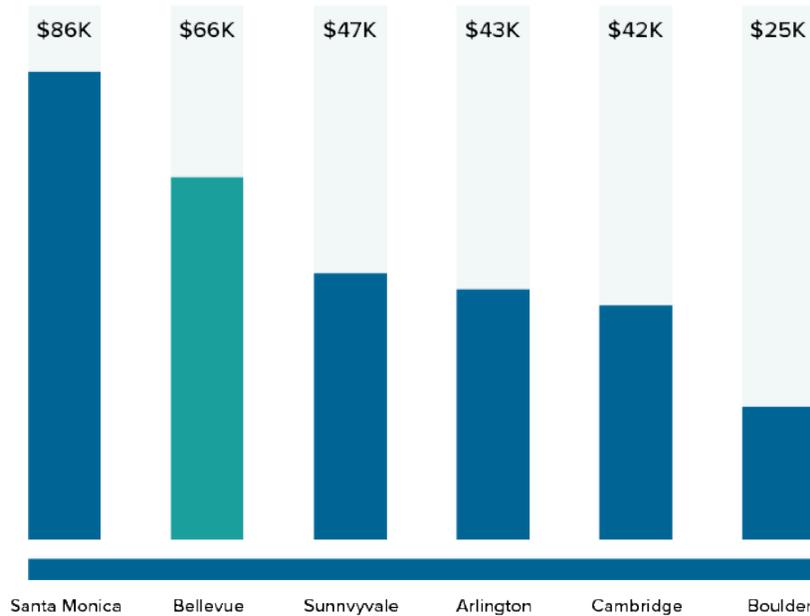
Self-employed individuals in Bellevue earn relatively high incomes. In 2018, average self-employment income among Bellevue households that reported self-employment income was roughly \$66,000.

This indicates that likely many self-employed individuals in Bellevue are not working in “gig” jobs, which tend to pay below average wages, but instead operating as services or other businesses.

Among benchmark regions, only Sunnyvale boasts greater self-employment income levels, with average self-employment income among Sunnyvale households that reported self-employment income slightly above \$86,000.

Figure 18. Average Self-Employment Income Among Households Reporting Self-Employment Income, 2018

Source: Avalanche Consulting / US Census Bureau



TALENT

Population Growth

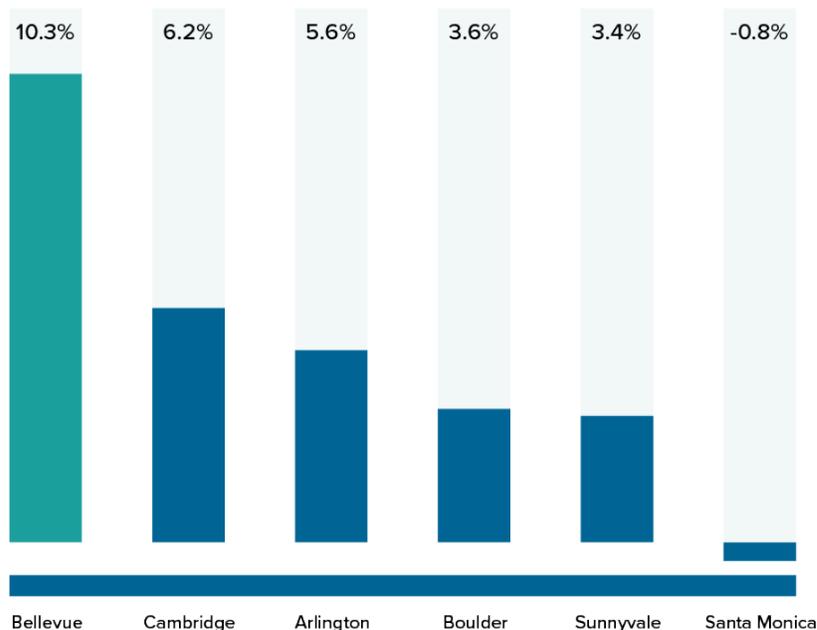
From 2013 to 2018, Bellevue's population grew more than 10% – surpassing 147,500 in 2018. This population growth rate exceeded the US average and all benchmark cities. Bellevue also benefits from a large and rapidly growing population in the surrounding region. In 2018, the Seattle region reached a population of nearly 4 million. The region's population grew 9% from 2013 to 2018 – faster than all benchmark regions: Boston, Boulder, Los Angeles, San Jose, and Washington DC.

Bellevue's growth is striking given its relative maturity and the limits of geography. Fast growing communities are often located on the far edge of metropolitan areas and characterized by an abundance of undeveloped land.

Being a more developed inner-ring community, Bellevue's growth has been facilitated by redevelopment patterns that have helped boost density throughout the city. Bellevue will likely be able to physically sustain significant growth for years to come as the city's population density remains less than all examined benchmark communities.

Figure 19. Population Growth, 2013 – 2018

Source: Avalanche Consulting / US Census Bureau



Population Density

Although downtown Bellevue features many high-rise office buildings and condos, overall the city has low population density.

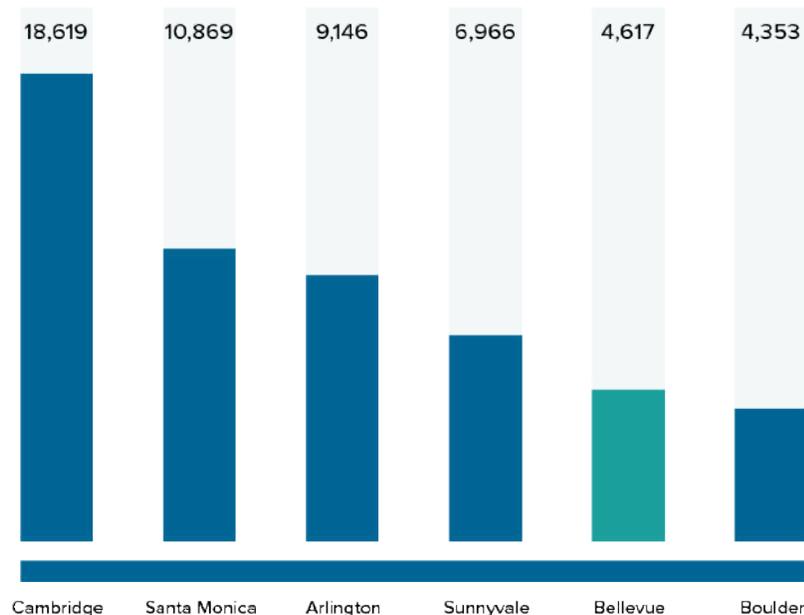
In 2018, Bellevue’s population density was approximately 4,600 people per square mile.

Among benchmark communities, only Boulder had fewer residents per square mile. While in contrast, Cambridge had four times the population density of Bellevue.

Santa Monica, Arlington, and Sunnyvale are also significantly more population dense than Bellevue.

Figure 20. Residents per Square Mile, 2018

Source: Avalanche Consulting / US Census Bureau



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“In 2018, Bellevue’s population density was approximately 4,600 people per square mile.”

Racial Diversity

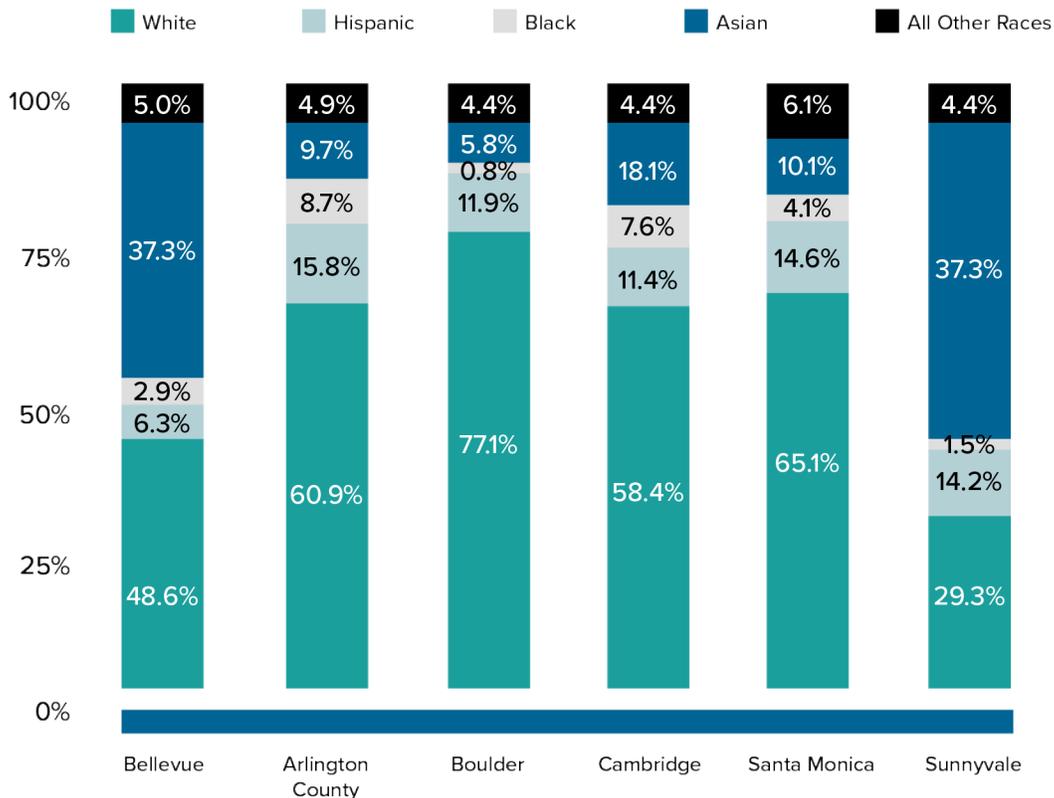
Bellevue is a remarkably racially diverse community. White residents make up 49% of the city’s population, followed by Asian residents (37%), Hispanic residents (6%), All Other Races (5%), and Black residents (3%).

Among the benchmark communities, only Sunnyvale is more racially diverse – with White residents comprising only 29% of the population.

Both Bellevue and Sunnyvale have the largest share of Asian residents at 37% and 51% respectively.

Figure 21. Racial Distribution of Residents, 2018

Source: Avalanche Consulting / US Census Bureau



Commuting Patterns

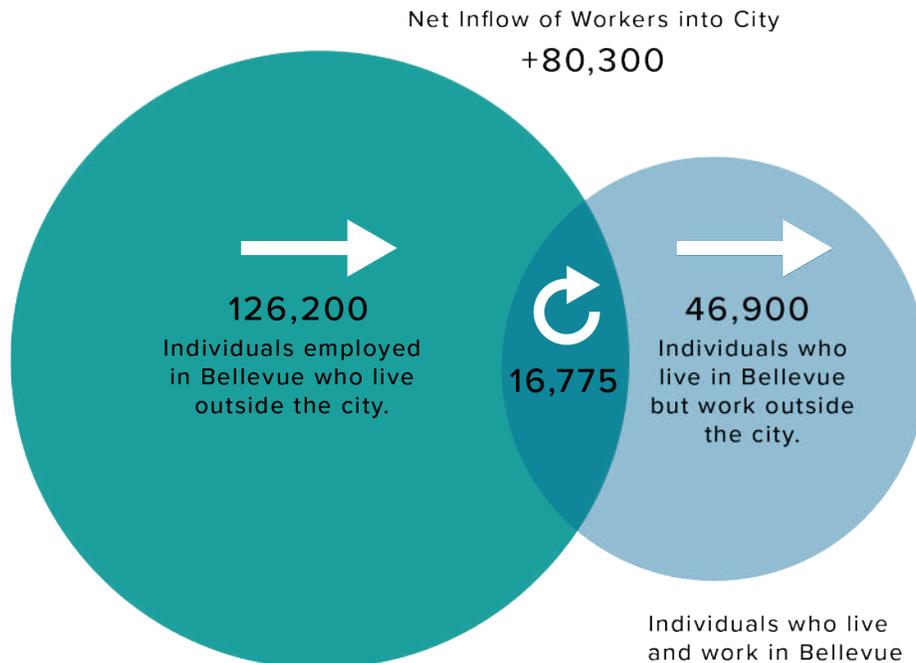
Bellevue is truly an employment destination, with almost three times the jobs in the city than working residents. These groups are also two distinct populations. There is relatively little overlap between those who live in Bellevue and those employed in Bellevue. Nearly 90% of workers employed in Bellevue live outside the city. At the same time, nearly 75% of employed Bellevue residents are employed elsewhere.

This is not uncommon for cities similarly positioned in large metropolitan areas – although the relatively high number of jobs in Bellevue is rare. All the benchmark cities see between 77% and 90% of their jobs filled by non-residents. Similarly, most see 70% to 90% of their residents working in other parts of their metropolitan areas.

The exception is Boulder, where 53% of working residents work within the city, but because Boulder is just outside the Denver metropolitan area, this may explain the difference.

Figure 22. City of Bellevue Commuting Patterns, 2017

Source: Avalanche Consulting / US Census Bureau



Transportation to Work

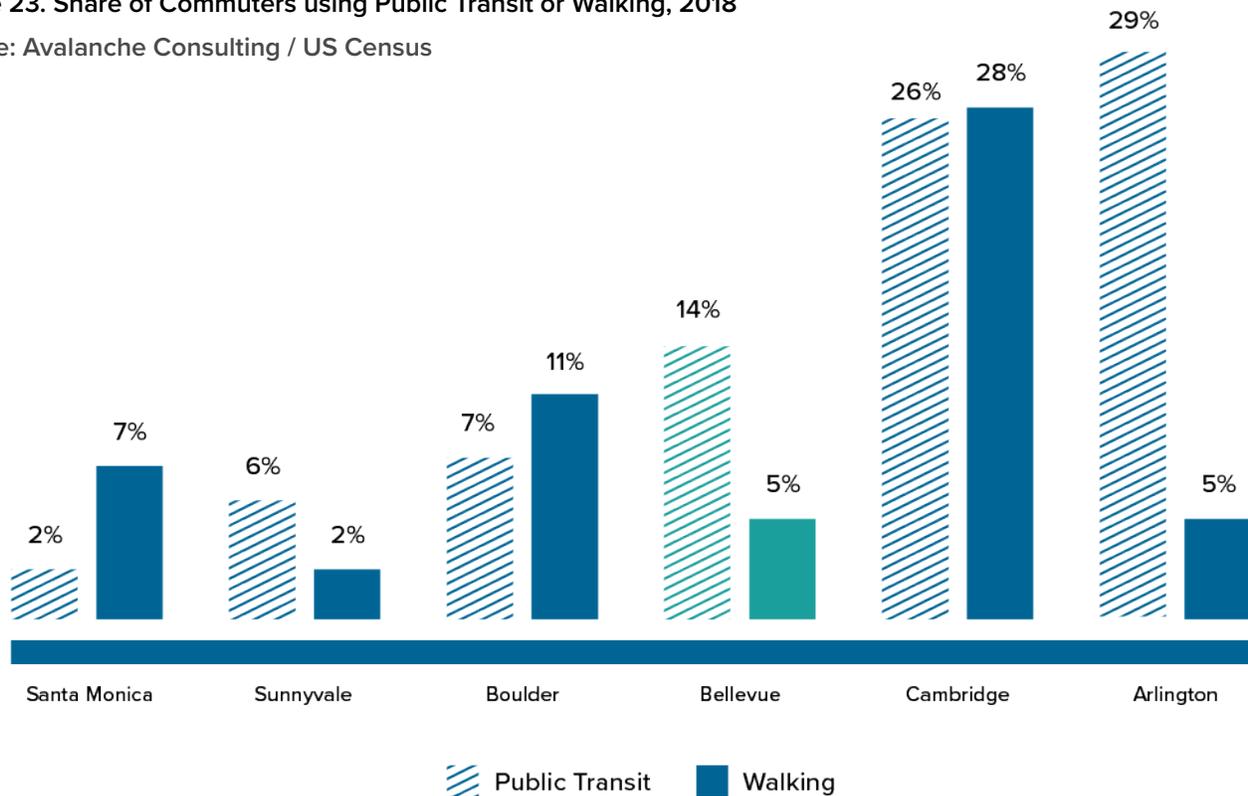
In 2018, a relatively high share (29%) of Bellevue residents used alternatives to driving in their commute to work. Among commuting Bellevue residents, 14% used public transit and another 5% walked – this is the same as in King County overall and only slightly below Seattle, where 23% used public transit and 10% walked.

Among Bellevue’s benchmarks, Arlington had the highest share of public transit users (29%) but the same share of walkers (5%) as Bellevue. Cambridge had the next highest share of public transit users (26%) and the highest share of walkers (28%) – likely reflective of the college town atmosphere and more historic nature of the town’s design, which is more conducive to walking.

Santa Monica (2%), Sunnyvale (6%), and Boulder (7%) all saw less public transit usage than Bellevue. Santa Monica (7%) and Boulder (11%) had a higher share of residents walking to work than Bellevue, but Sunnyvale had the lowest share at 2%.

Figure 23. Share of Commuters using Public Transit or Walking, 2018

Source: Avalanche Consulting / US Census



Educational Attainment

Bellevue is among the most educated communities in the US – ranking 3rd best educated among the nation’s 200 largest cities.

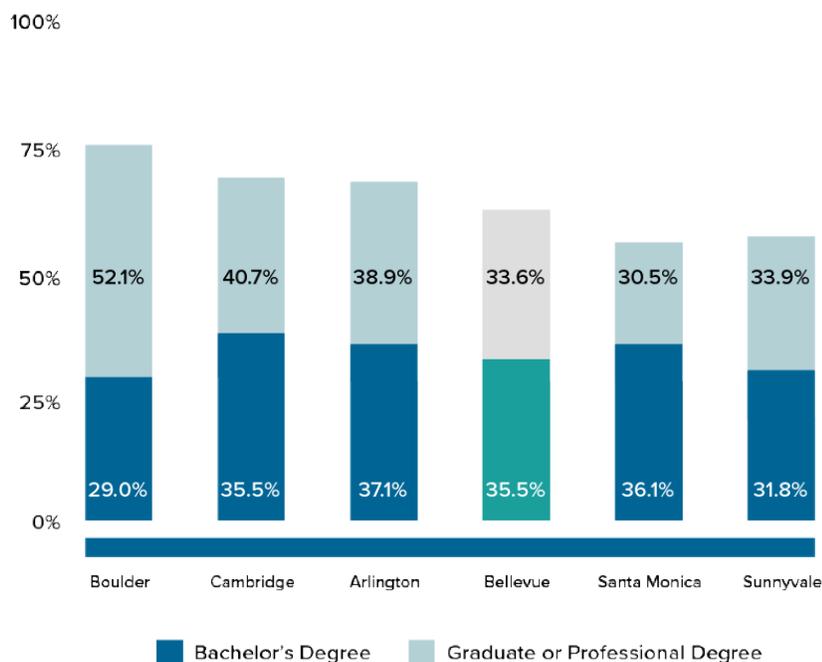
Nationally, approximately one in three adults age 25 and older possess a bachelor’s degree or higher level of education. In Bellevue, nearly 70% of adults age 25 and older hold a bachelor’s degrees and possibly a graduate or professional degree.

Bellevue’s benchmark communities are also very well-educated. Boulder, Cambridge, and Arlington County all have higher levels of educational attainment than Bellevue. This is largely explained by the presence of the University of Colorado in Boulder and Harvard and MIT in Cambridge. Arlington is also home to numerous 4-year universities.

The fact that Bellevue is as well educated as these major university centers reflects the city’s success in attracting new residents with advanced degrees. Bellevue College, the city’s large post-secondary educational institution, awarded less than 200 bachelor’s degrees in 2018, and the Global Innovation Exchange (GIX) also confers a modest number of degrees each year. Most residents of Bellevue with advanced degrees at some point moved to the city from somewhere else.

Figure 24. Educational Attainment Among Population Age 25+, 2018

Source: Avalanche Consulting / US Census Bureau



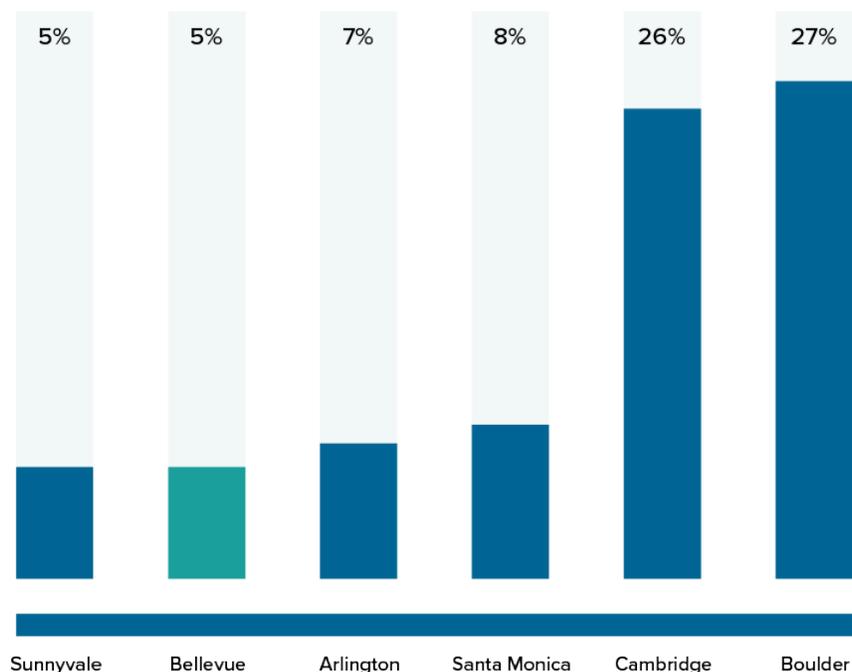
Education Pipeline

In 2018, 8,000 residents of Bellevue were enrolled in some form of college – approximately 5% of the city’s population. This was about the same number and share as Sunnyvale, which had 7,851 students. Boulder (29,100 students at 27%) and Cambridge (31,100 at 26%) had the largest student populations, which reflects the presence of large universities within both cities. The same year, King County was home to 121,700 college students – roughly 5% of the population. In contrast, many other regions have a higher share of college students – for example, 7% of Los Angeles County residents were college students and 8% of the San Francisco Metropolitan Area and Washington DC Metropolitan Areas.

Most of Bellevue’s college students are enrolled in Bellevue College – the largest school in the Washington Community and Technical Colleges system, and the third largest post- secondary educational institution in the state of Washington. In 2018, Bellevue College awarded 376 certificates – with roughly a third in Computer Science, a third in Business, and a third in Health Professions. The college awarded another 2,123 associate degrees – with the majority (1,445) in Liberal Arts, which usually indicates plans to transfer to a larger, 4-year institution. The next largest associate degree categories were Business (24), Health Professions (163) and Computer Science (87). Bellevue College also awarded 173 bachelor’s degrees – with the largest categories in Health Professions (63), Computer Science (56), and Visual & Performing Arts (38).

Figure 25. Share of Population Enrolled in College, 2018

Source: Avalanche Consulting / US Census Bureau



Labor Force Participation

Approximately 80% of Bellevue residents between the ages of 25 and 64 participate in the workforce. Among benchmark communities, Bellevue has the lowest labor participation rate among its prime working age population (though it exceeds the US figure).

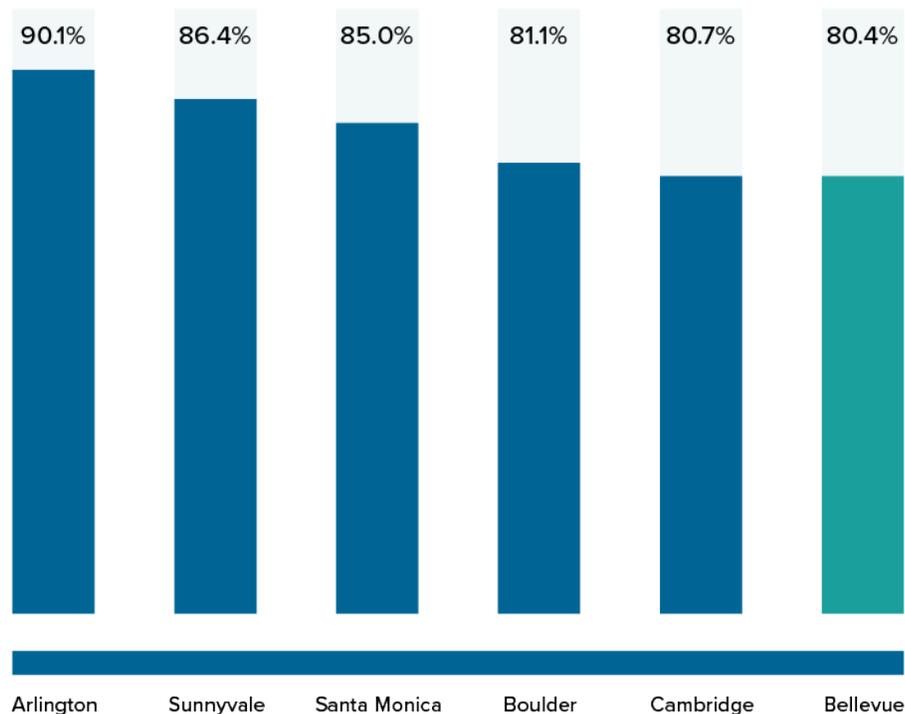
At just 56%, labor participation rates among Bellevue residents between the ages of 60 and 64 are especially low.

Of Bellevue residents between 25 and 64 not in the labor force, 75% are women, 62% are White, 35% are Asian, and 60% have a bachelor's degree.

Of working age individuals not in the labor force, 42% have children under 18 at home.

Figure 26. Labor Force Participation Rate (Age 25 to 64), 2018

Source: Avalanche Consulting / US Census Bureau



RETAIL

Historical Total Retail Sales

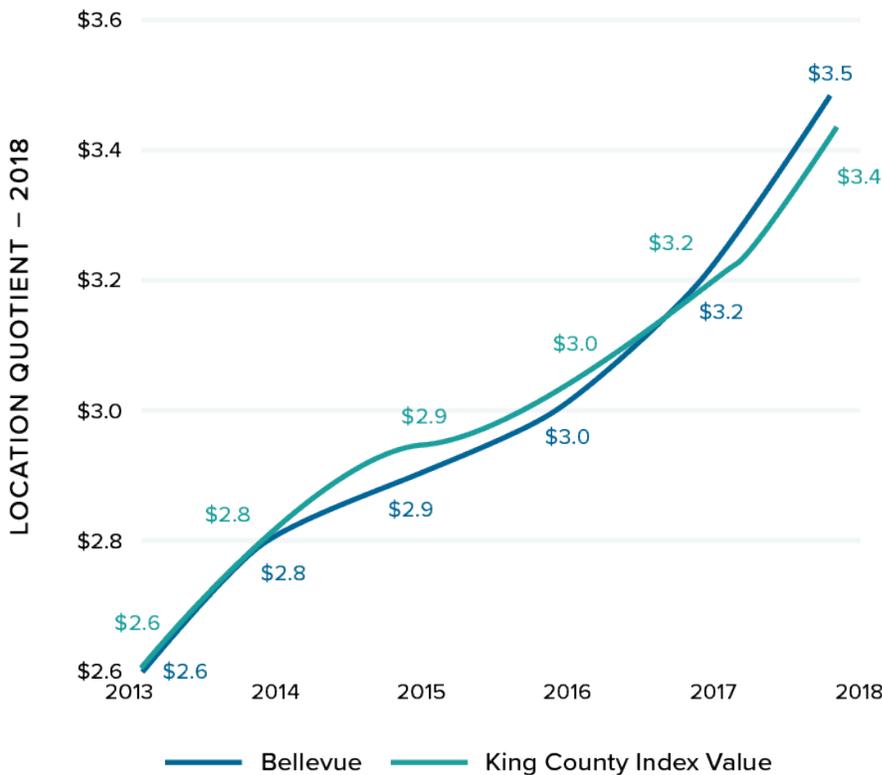
Retail sales have grown steadily in Bellevue in recent years, reaching \$3.5 billion in 2018 – a 30% increase over five years.

On a percentage basis, these gains have largely tracked the combined totals for King County and its constituent cities.

From 2017 to 2018, however, retail sales in Bellevue rose 10% - faster than the 7.2% increase in King County.

Figure 27. Retail Sales (in billions)

Source: Avalanche Consulting / Washington State Department of Revenue



Retail Sales – Total & Per Capita

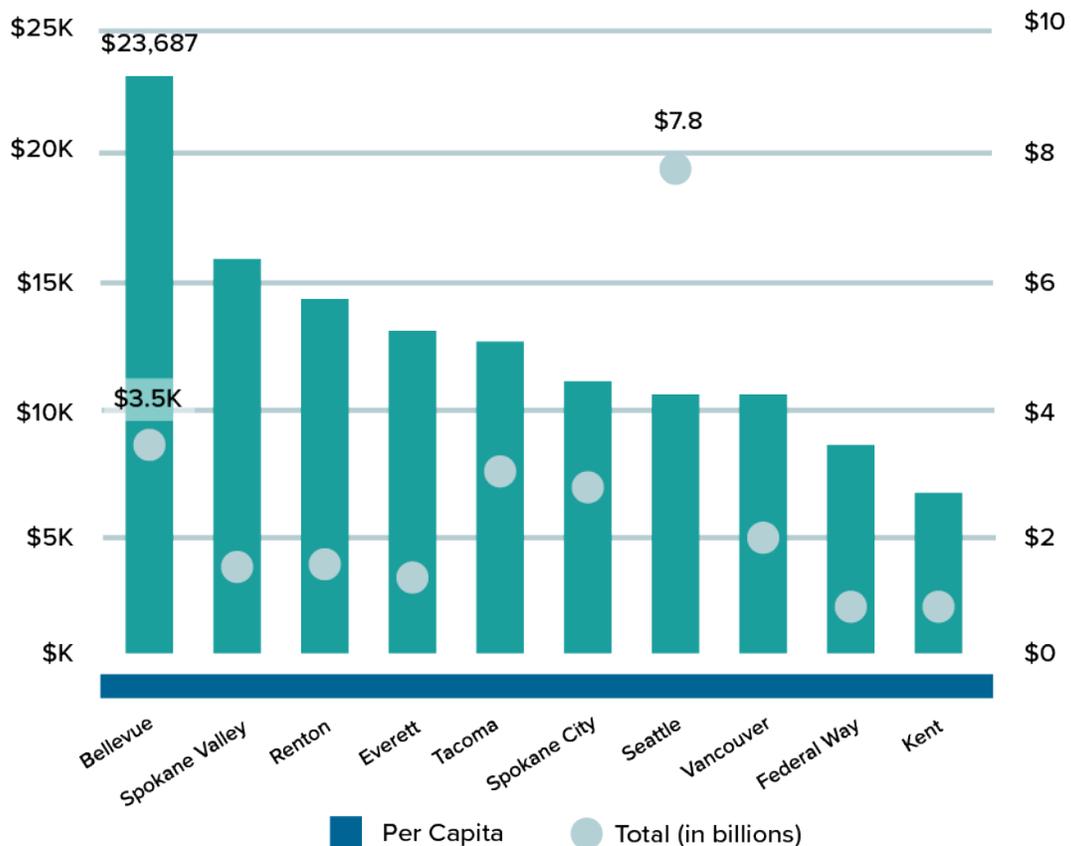
In 2018, Bellevue had the 2nd highest total retail sales among Washington’s 10 most populous cities. Seattle had the most volume at \$7.8 billion in sales, followed by Bellevue (\$3.5B), Tacoma (\$2.6B), Spokane City (\$2.4B), and Vancouver (\$1.9B).

The same year, Bellevue had the highest per capita retail sales by a significant margin. Bellevue had nearly \$24,000 retail sales per resident – approximately 60% higher than the second most concentrated, Spokane Valley. This indicates that Bellevue is a destination for retail – with significantly more sales than the city’s population alone would expect.

While retail sales in the city were bolstered by anchors such as Bellevue Square and The Shops at The Bravern, car dealerships were the largest contributor to local retail sales value. In 2018, automobile sales represented nearly 40% of all retail sales value in Bellevue.

Figure 28. Per Capita & Total Retail Sales (10 Most Populous Cities in WA), 2018

Source: Avalanche Consulting / Washington State Department of Revenue



Total Retail Sales by Category

Despite frequent national talk of the coming “retail apocalypse,” brick and mortar sales in Bellevue continue to increase among most retail categories.

Auto sales represent the largest share of taxable sales – \$1.3 billion and nearly 40% of all sales in 2018, which is double the King County average. These sales are also growing rapidly – rising 58% from 2013 to 2018.

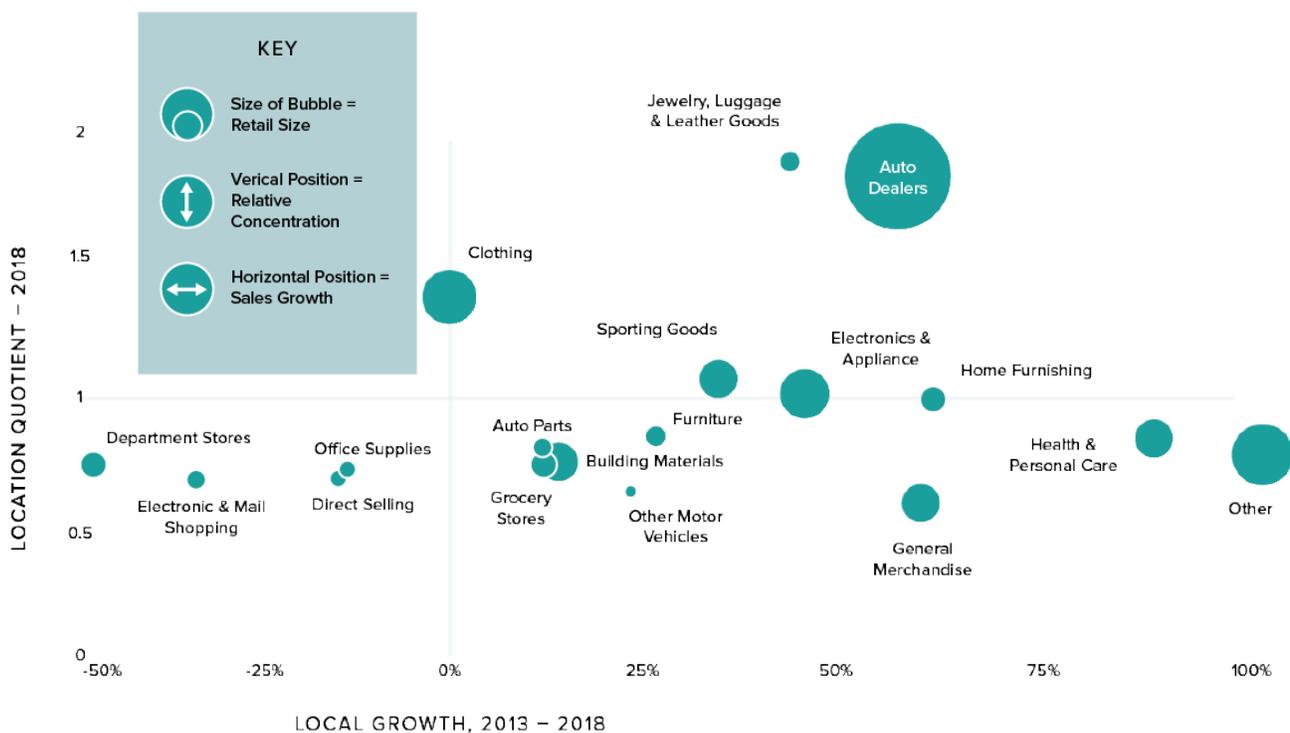
The next largest retail sales categories are Clothing (\$429 million), Electronics & Appliance (\$309 million), General Merchandise (\$149 million), Sporting Goods (\$144 million), and Building Materials (\$125 million).

On a proportional basis, the retail sales categories more concentrated in Bellevue than King County are Jewelry, Luggage, & Leather Goods; Auto Dealers; Clothing; Sporting Goods; and Electronics & Appliance.

From 2013 to 2018, the fastest growing retail sales categories in Bellevue were Health & Personal Care (88% growth), Home Furnishing (60%), Auto Dealers (58%), General Merchandise (52%), and Electronics & Appliance (41%).

Figure 29. Bellevue Retail Sales by Sector, Growth and Relative Concentration to King County

Source: Avalanche Consulting / Washington State Department of Revenue



Per Capita Retail Sales by Category

Per capita retail sales in Bellevue exceed the countywide figure across almost every retail category.

Bellevue most outperforms the county average in Automobile sales. In 2018, per capita auto sales in Bellevue approached \$10,000, whereas in King County, per capita auto sales were \$1,500.

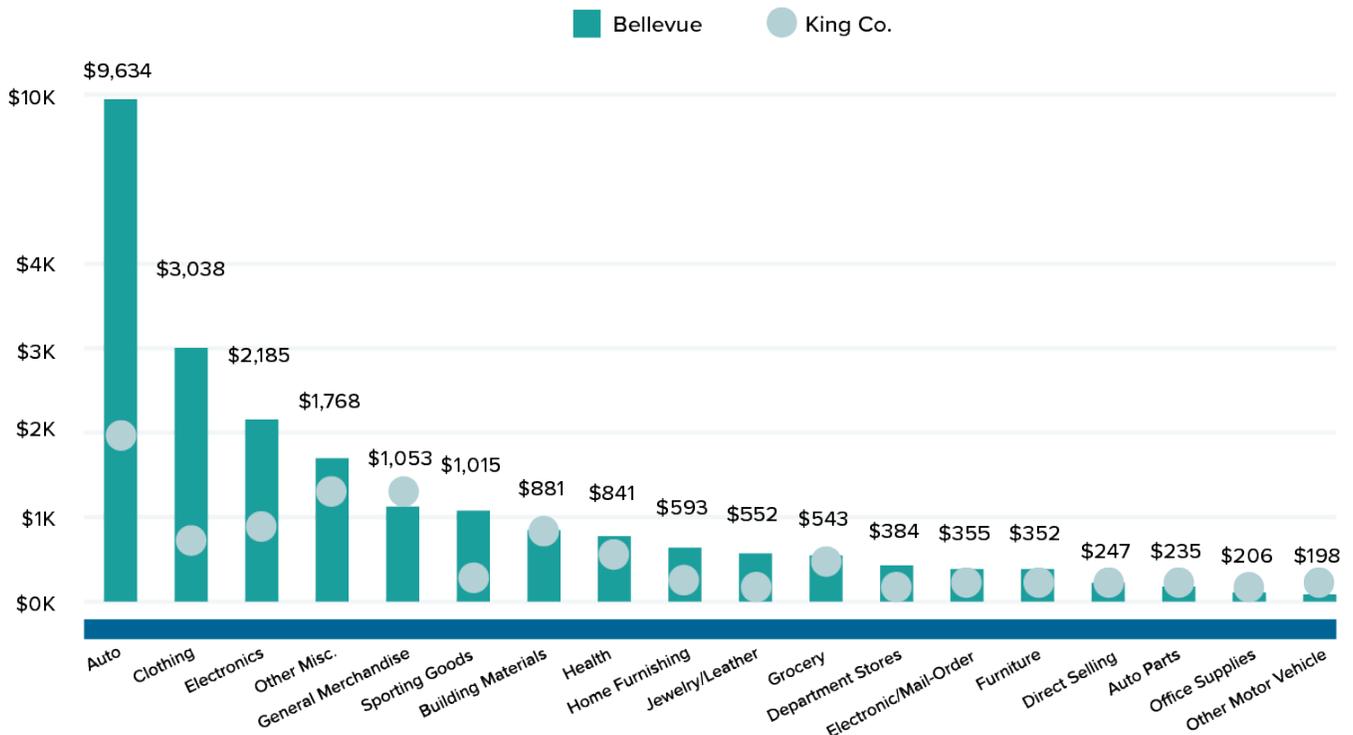
At more than \$3,000 per person, clothing sales in Bellevue are more than 4 times greater than the King County average.

Other areas of relative retail strength in Bellevue include Electronics/Appliance stores, Sports Goods, Hobby & Musical Instrument Stores, Jewelry, Luggage & Leather Goods Stores, and Building Materials & Supplies Stores.

Per capita sales figures in Bellevue for Other General Merchandise Stores and Other Motor Vehicle Stores the countywide averages by slight margins.

Figure 30. Per Capita Retail Sales, 2018

Source: Avalanche Consulting / Washington State Department of Revenue



Change in Retail Sales by Category

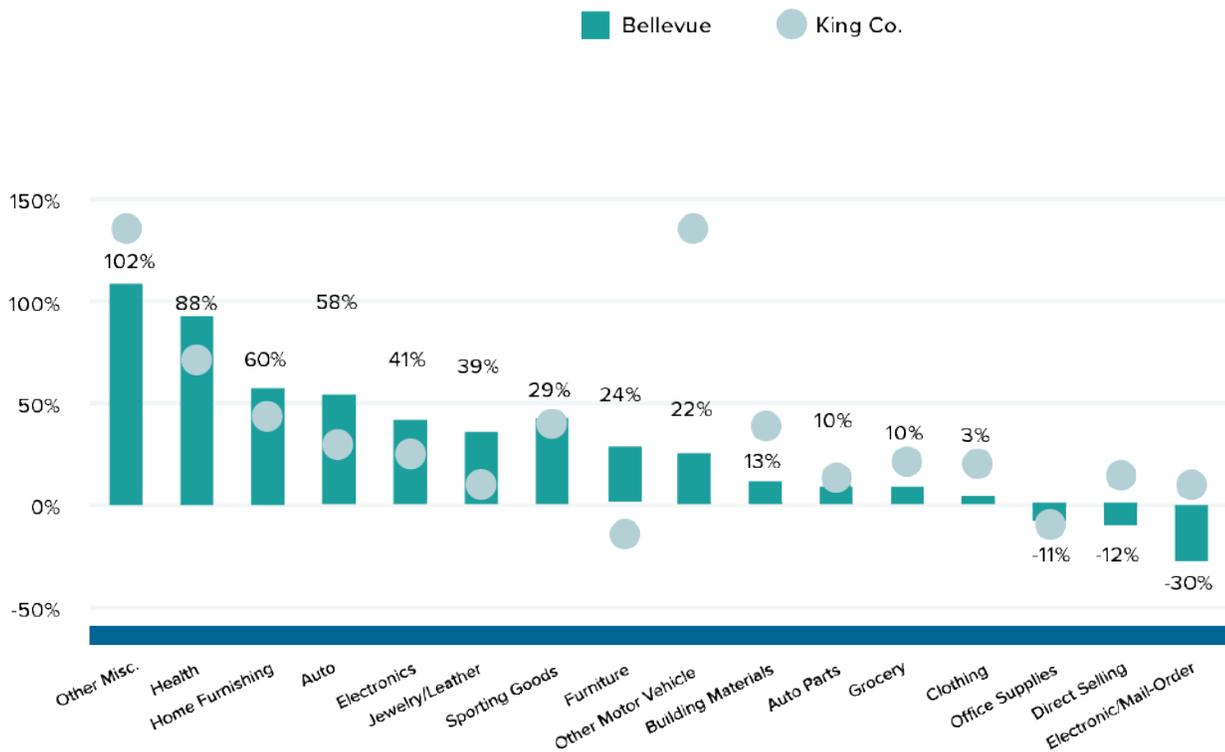
Retail sales in most categories grew in Bellevue over the past five years – often faster than growth in King County as a whole.

Sales from Other Miscellaneous Store Retailers in Bellevue doubled between 2013 and 2018. Health & Personal Care Stores and Home Furnishing sales in Bellevue climbed approximately 90% and 60% respectively. Auto sales rose 58% - nearly twice the countywide growth rate.

Due to the incredible volume of auto sales in Bellevue, the category was responsible for half of all the sales tax revenue increase in the city between 2013 and 2018.

Figure 31. Change in Retail Sales by Retail Category, 2013 – 2018

Source: Avalanche Consulting / Washington State Department of Revenue



Sales from Other Miscellaneous Store Retailers in Bellevue doubled between 2013 and 2018.

CREATIVE ECONOMY

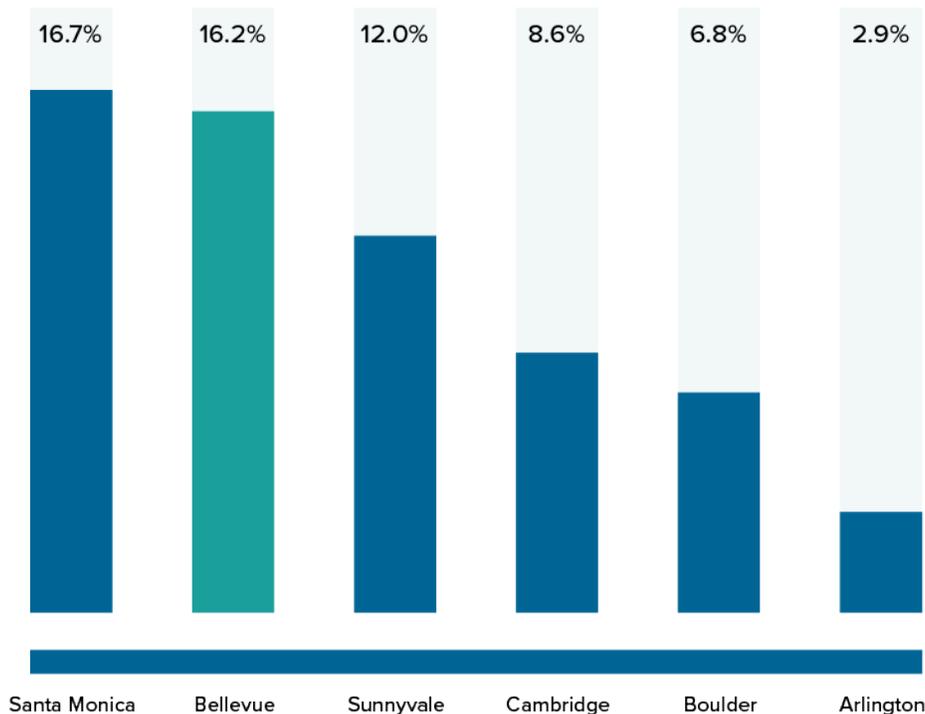
Creative Economy Employment

As defined by the City of Bellevue's 2018 Creative Edge report, the Creative Economy includes a variety of sub-clusters in industries such as manufacturing, retail, information services, design, and performing arts.

More than 16% of all employment in Bellevue falls under the Creative Economy designation. Among benchmark regions, only Santa Monica has a greater proportion of Creative Economy employment.

Figure 32. Creative Economy Employment as % of Total Employment, 2018

Source: Avalanche Consulting / EMSI



Creative Economy Employment by Sector

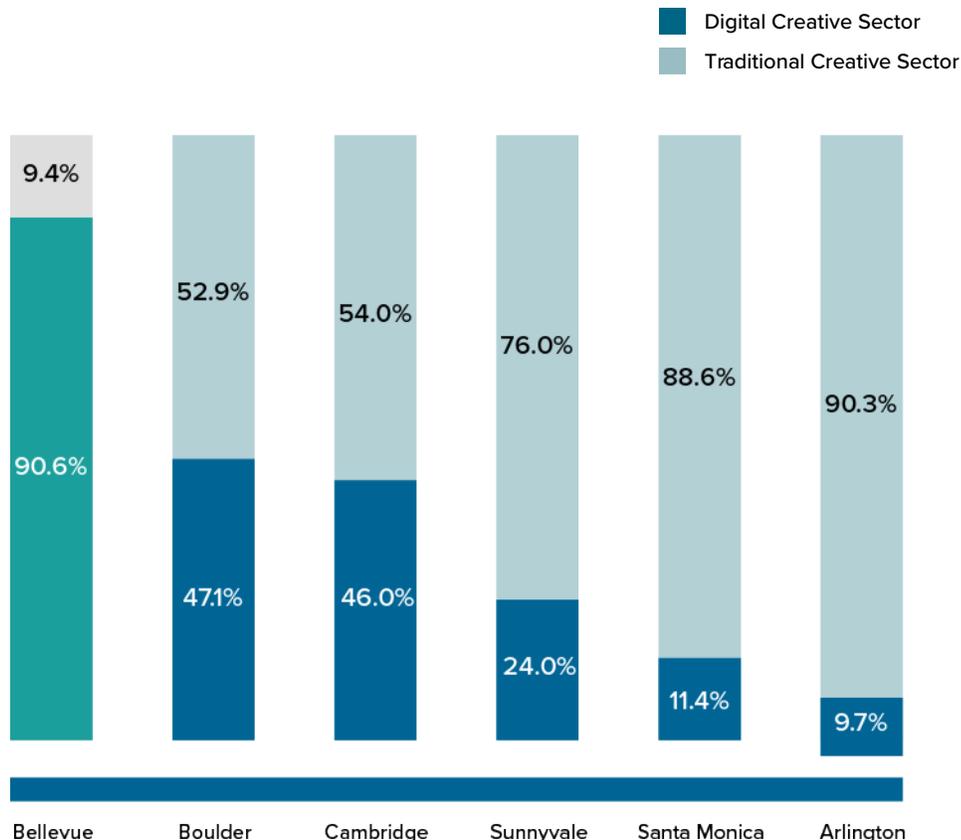
While Bellevue boasts the greatest share of Creative Economy employment among all examined benchmark regions, this statistic is bolstered by the inclusion of software publishing within the Creative Economy definition. With one of the highest concentrations of software jobs in the county, Bellevue's Creative Economy may appear disproportionately large and affluent than a more traditional creative economy.

For purposes of this scan, we will occasionally separate the Creative Economy into two sub-clusters – Digital Creative (which includes software) and Traditional Creative (which includes art museums, performance studios, and other similar operations).

Bellevue's Digital Creative sub-cluster is very large, but the Traditional Creative sub-cluster is the smallest among benchmark communities. In the other benchmark cities, Digital Creative represents an average of 28% of the Creative Economy. In contrast, Digital Creative comprises 91% of Bellevue's Creative Economy.

Figure 33. % of Creative Economy Employment by Sector, 2018

Source: Avalanche Consulting / EMSI



Change in Creative Economy Employment

Between 2013 and 2018, Creative Economy employment in Bellevue increased by approximately 22%.

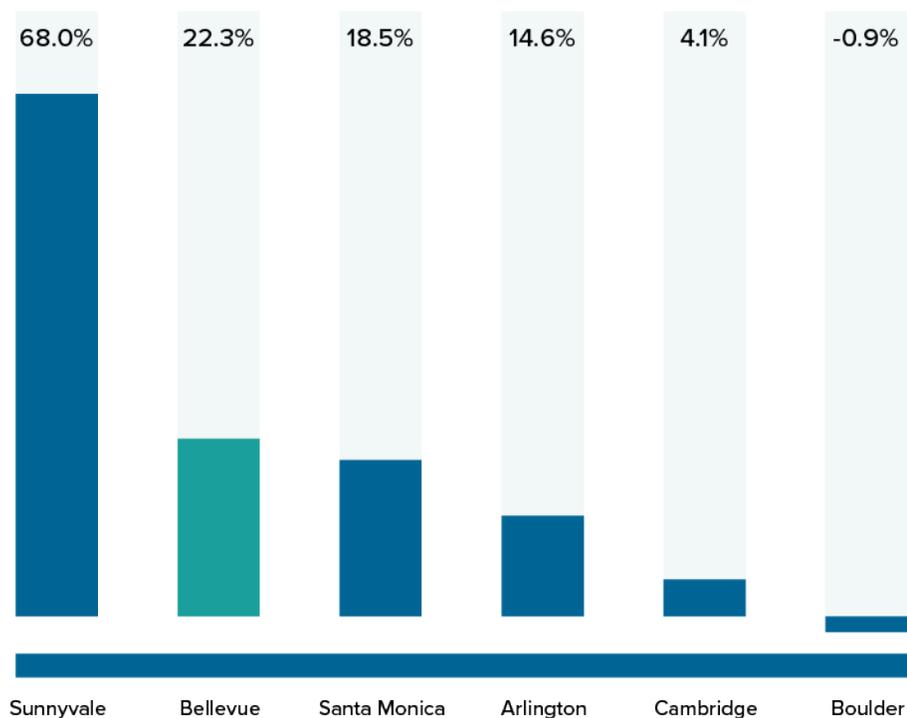
Among benchmark regions, only Sunnyvale experienced greater Creative Economy employment gains during this period. Google was responsible for the lion's share of Sunnyvale's Creative Economy employment growth – local employment in internet publishing and web search portals increased by nearly 85% during the past five years.

In Bellevue, the Traditional Creative sub-cluster grew slightly faster than Digital Creative but created fewer total jobs.

Between 2013 and 2018, Traditional Creative employment in Bellevue grew more than 32% – creating slightly more than 500 new jobs. In contrast, Digital Creative grew 21%, but created more than 3,600 new jobs.

Figure 34. Creative Economy Employment Change, 2013 – 2018

Source: Avalanche Consulting / EMSI



TOURISM

Tourism Employment by Sub-Cluster

Bellevue’s tourism cluster consists of five sub-clusters – Travel Support Services, Food Services, Lodging, Bars / Breweries, and Arts, Culture & Recreation. All tourism sub-clusters are less concentrated in Bellevue than the US average.

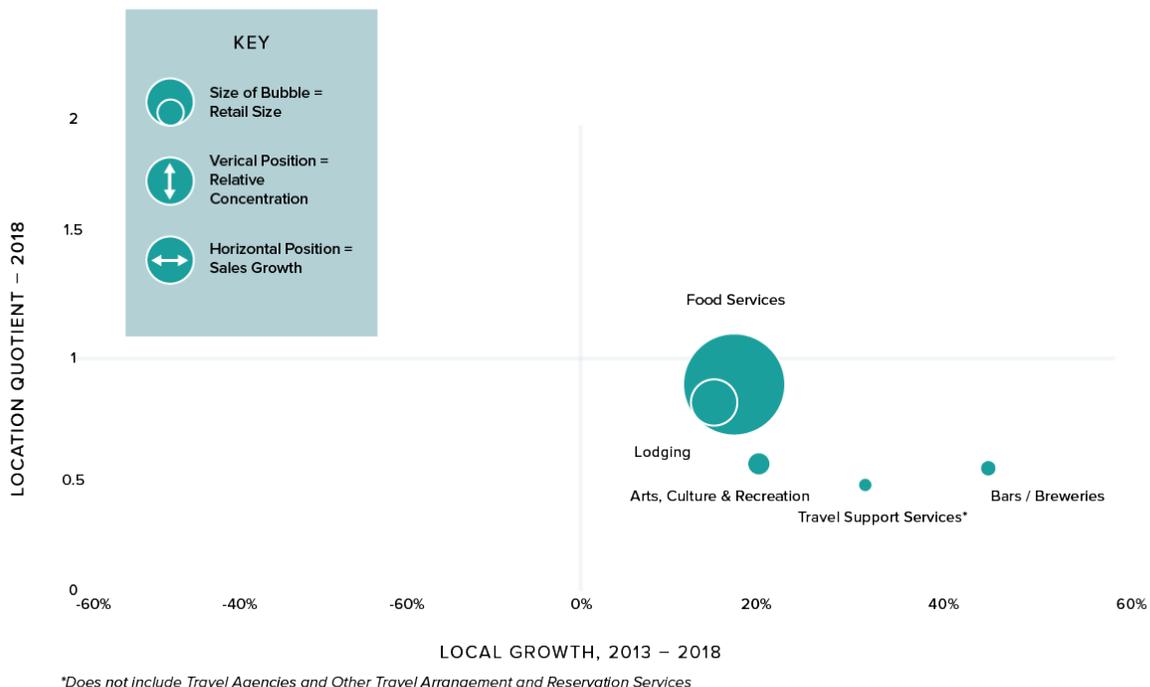
Food Services is by far the largest and most concentrated tourism sub-cluster in Bellevue, with nearly 9,000 jobs and only 10% less concentrated than the US average. Followed by Lodging, with nearly 1,500 jobs and 20% less concentrated.

All sub-clusters are growing though – indicating that they will become more concentrated over time. The fastest growing (but still small) sub-cluster is Bars / Breweries.

Note: travel agency employment has been excluded from this analysis, because it disproportionately skewed the data due to Expedia’s presence in Bellevue. Since Expedia is not truly a Tourism corporation, but rather information technology, and is now relocating their operations – this employment category is not included in the analysis.

Figure 35. Bellevue Tourism Industry Sub-Cluster by Size, Employment Change & Concentration

Source: Avalanche Consulting / Puget Sound Regional Council / EMSI



Tourism Sales Collections

In recent years, both accommodation and convention/trade show tax revenues in Bellevue have posted healthy rates of growth.

Fueled by an increase in available hotel rooms and increasing traveler volumes, accommodation tax collections by the City of Bellevue reached \$5.2 million in 2018 – an increase of nearly 60% from 2013.

Convention and trade show tax revenue also continues to grow – reaching \$7.4 million in 2018, an increase of more than 25% from 2013.

Figure 36. Tourism Tax Collections (in millions)

Source: Avalanche Consulting / City of Bellevue



Hotel Inventory

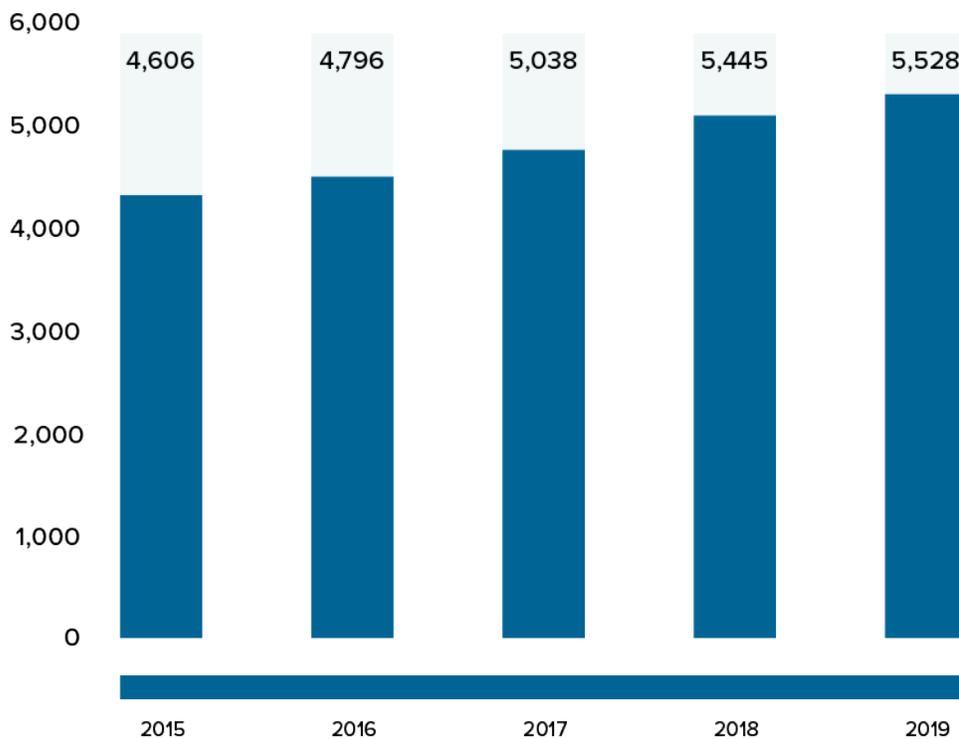
In recent years, hotel room inventory grew steadily in Bellevue. Since 2015, the number of available hotel rooms in Bellevue increased by 20%.

Occupancy rates also steadily increased over the past few years, but Bellevue hotels remain heavily dependent on business travels – weekday occupancy and average daily rates remain higher than weekends.

In 2019, the hotel occupancy rates for Bellevue hotels Sunday through Thursday approached 76%. On the weekends, however, average occupancy rates fall to approximately 65%.

Figure 37. Bellevue Hotel Room Inventory (Does Not Include Short-Term Rentals)

Source: Avalanche Consulting / Visit Bellevue



Per Capita Tourism Sales

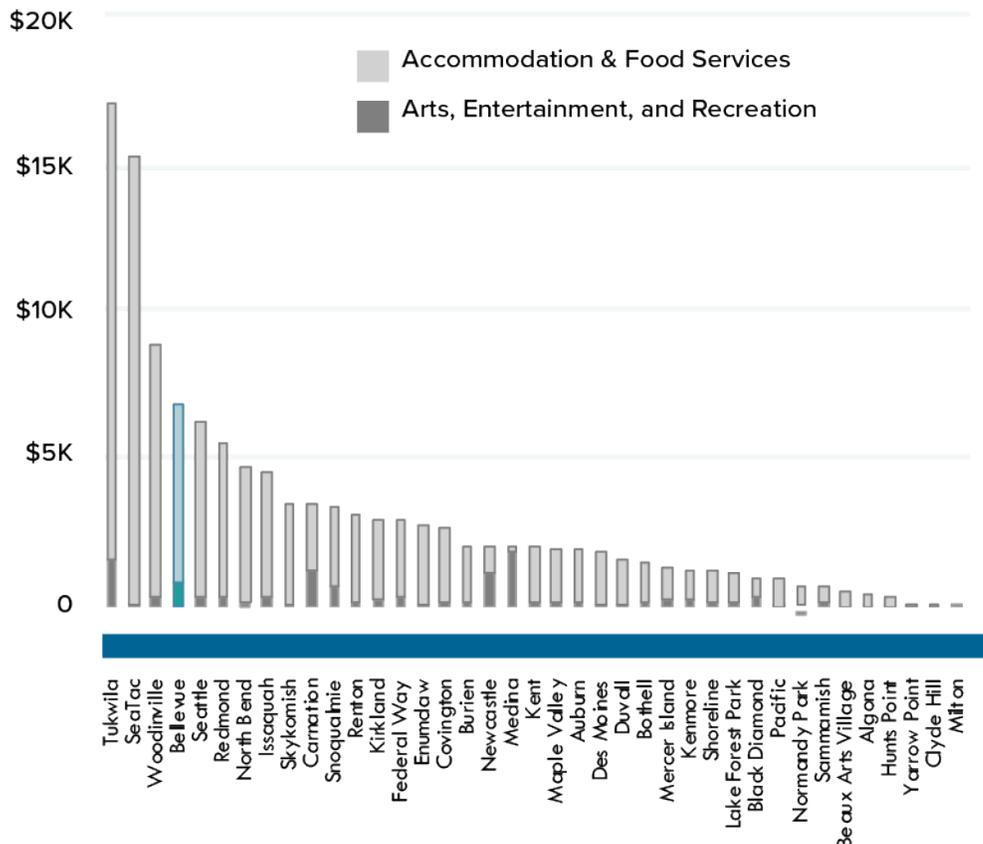
In 2018, per capita spending on Accommodation & Food Services and Arts, Entertainment, and Recreation in Bellevue exceeded \$7,000. A high concentration of per capita sales is positive for a community, because it means that a higher share of outside dollars are being spent locally – generating tax revenues that benefit residents.

The only two cities in King County with a higher per capita Tourism sales share were Tukwila and Woodinville, which have much smaller populations – amplifying the relative concentration of visitor spending. The relative high concentration of per capita Tourism sales in Bellevue indicates that it is one of the top regional destinations for visitor spending.

At approximately \$6,200 per person, Accommodation & Food Services represents the lion share of Bellevue’s tourism related spending. Per capita Arts, Entertainment, and Recreation expenditures in Bellevue total less than \$900.

Figure 38. Per Capita Accommodation & Food Services and Arts, Entertainment, and Recreation Sales (King County Cities), 2018

Source: Avalanche Consulting / Washington State Department of Revenue



Growth in Tourism Sales

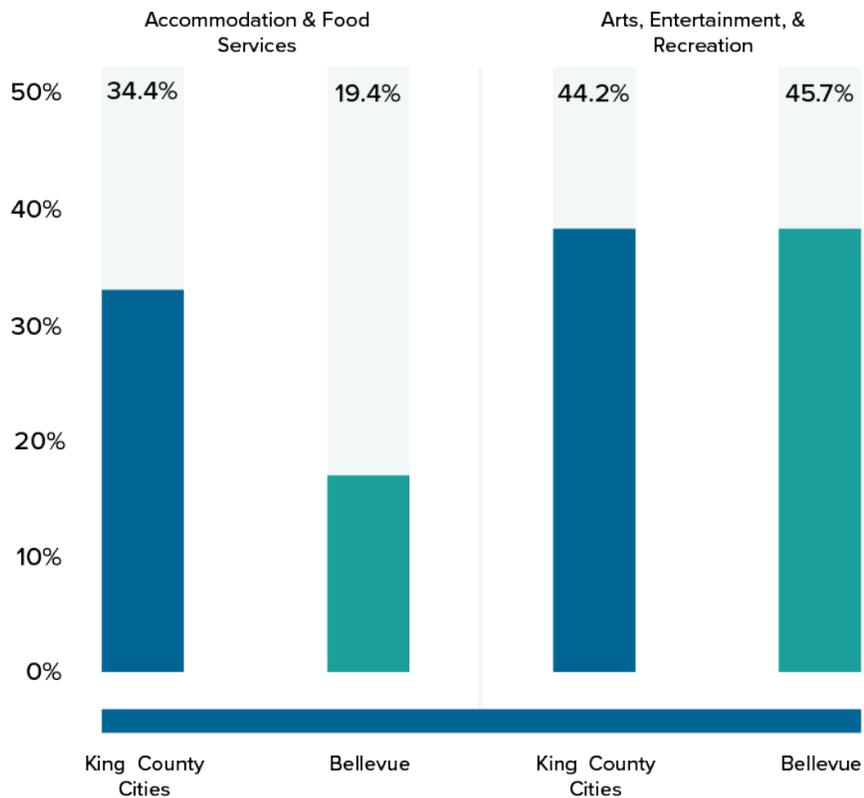
Both Accommodation & Food Services and Arts, Entertainment, and Recreation sales activity within Bellevue rose in recent years.

Between 2013 and 2018, Arts, Entertainment, and Recreation sales in Bellevue rose nearly 46%, slightly outpacing the combined growth rate of all King County cities during this period.

Since 2013, Accommodation & Food Services sales in Bellevue rose slightly more than 19%. This increase was significantly less than the 35% growth rate posted by King County cities.

Figure 39. Change in Accommodation & Food Services and Arts, Entertainment, and Recreation Sales, 2013 - 2018

Source: Avalanche Consulting / Washington State Department of Revenue



APPENDIX II

Bellevue's Economic Development Plan 2020 Update

DECEMBER FOCUS GROUP SUMMARIES

Creative Economy

During this focus groups, the Avalanche consultants and participants discussed the characteristics of Bellevue's Creative Economy, challenges and opportunities for Creative Economy organizations operating in Bellevue, and possibilities to build greater alignment and support for these organizations and businesses.

When discussing challenges, participants identified affordability of space as the greatest issue for creative operations in the city and region. Other issues raised were a lack of non-commercial galleries and limited performance space in the city.

Capacity Building

The Capacity Building focus group featured participants from the non-profit and business community. During this conversation, participants identified priority issues in the community, discussed existing partnerships and initiatives, and explored opportunities to enrich these partnerships and bring together the public sector, private businesses, and non-profits to advance goals across the city.

Priority issues discussed included homelessness, the arts, youth, education, public safety, traffic, and mobility. Participants noted that Bellevue's image in the region often does not reflect the modern reality – noting that the city may be perceived as wealthy, white, and culturally sterile by regional residents, despite its high racial diversity, cultural and arts resources, and existing populations in need.

Retail

Participants of the Retail focus group included retail establishment owners and retail property developers and managers. The conversation centered on the history of retail in Bellevue and challenges for developing, opening, owning, and operating retail stores and restaurants. The discussion also explored opportunities to better support retail and encourage more unique, locally-owned establishments.

Participants noted that although Bellevue is the primary retail center on the Eastside, it can be very challenging for all retailers, but especially locally-based ones, to be successful in the city.

The discussion additionally explored the changing nature of the retail industry globally – which is focused less on the sale of goods and more on services, experiences, and unique retail and restaurants. In addition, participants noted a range of code changes, marketing initiatives, and small business tools that could help support the sector. This included broader discussion of ways that the retail community could build greater alignment to provide tools and support to each other and advocate for their needs – potentially through a retail alliance.

Small Business

The Small Business focus group included small business owners and operators and individuals that provide support services to small business – ranging from technology startups to retailers and service providers. The focus group discussion focused on challenges for small business operating in Bellevue and opportunities to support and help them grow.

Participants noted that affordability is a common concern for many businesses – both in terms of finding space to operate but also in hiring and retaining employees, many of whom cannot afford to live in Bellevue. Increasing traffic and longer commute times were raised as concerns. Participants also noted that the business environment in Bellevue is extremely tech focused, and that some long-time manufacturers operating in the city are feeling pushed out – by limited available zoned land and overall policies.

Participants also celebrated the sense of community in Bellevue, the entrepreneurial nature of the city and its residents (including a willingness to invest in new technologies and be a regional leader), the racial diversity of residents, and an overall focus on equity and inclusion. Overall the city is perceived as business friendly, but there was a desire to provide more support for the “missing middle” of mid-size businesses.

Bellevue's Economic Development Plan 2020 Update

JANUARY FOCUS GROUP SUMMARIES

Creative Economy

During this focus group, the Avalanche consultants and participants continued a discussion focused on understanding the challenges and opportunities around Bellevue's Creative Economy. The Avalanche team summarized key findings from the December focus group and then introduced draft strategic ideas for discussion. City staff also participated in this session and provided feedback during the workshop. Participants shared their thoughts on strategic ideas, explored how these ideas might work operationally, identified existing related efforts on which to build, and brainstormed additional strategies.

The focus group discussion covered a range of topics, including:

- Conducting a detailed inventory of performing arts venues and facilities in Bellevue. Some participants identified challenges associated with the task, including ownership and maintenance of the information. Similar concerns were expressed about the creation and maintenance of a centralized website with up-to-date information on Bellevue's Creative Economy.
- Establishing a Creative Coalition to bring together the Creative community, enhance communication, facilitate advocacy, share ideas, provide support, and overall speak with one voice. There is a significant need for information about artists in the city. A database of local artist may help address this deficiency.
- Creating more accountability for action around Creative Economy needs. There is a distinct need for leadership and coordination among the arts community, particularly in setting a timeframe and agenda to "get things done." There remains some question as to whether there is an existing organization focused on community building that might take the lead on this effort or if a new organization is needed. Although the City does not currently possess sufficient staffing resources to directly manage this effort, it might be able to assist in the creation of organization. The BDA was also mentioned as having a potential role.
- Expanding public art offerings and allowing for more diverse options, including digital projections and other formats.
- Promoting opportunities to display more local artist work at local businesses and in public spaces and buildings. These could be highlighted on maps and walking paths.
- Connecting people to more space for juried shows.
- Highlighting the importance of art as a public health issue.
- Exploring options for the City to work with private partners to establish a multi-purpose facility for the creative arts. Although a feasibility study has been completed, it remains to be seen if this facility will become a reality.
- Continuing the Bel-Red Streetscape plan and the City's partnership with 4Culture to continue the Arts District Planning, with the intent to finish by the end of the year.
- Building on Bellwether to provide expanded events and include more local artists.
- Creating a High Tech Working Group or Digital Council to find ways for digital artists to engage more with the Creative community and build events and exhibits that showcase local digital creatives.
- Identifying roles for the Arts Commission in the plan. It was also noted that the City has not expanded its budget for the arts in some time.

Bellevue's Economic Development Plan 2020 Update

JANUARY FOCUS GROUP SUMMARIES

Capacity Building

During this focus group, the Avalanche consultants and participants continued a discussion focused on exploring ways to enhance partnerships between the City, private sector, and non-profits in order to advance goals and address important topics in the community.

The Avalanche team summarized key findings from the December focus group and then introduced some draft strategic ideas for discussion. City staff also attended this session to provide direct perspective in the workshop. Participants shared their thoughts on strategic ideas, explored how they might work operationally, identified existing related efforts on which to build, and brainstormed additional strategies.

The focus group discussion covered a range of topics, including:

- The importance of valuing and exploring public private partnerships.
- The need to employ appropriate language to effectively communicate about this topic, galvanize, and ensure that everybody is on the same page. For example, the use of “policy” versus “projects” may help facilitate collaborations.
- The discussion also included talk about possible pathways to engage businesses in advocacy around specific topics. Some businesses noted that top concerns include transportation and housing.
- The idea of creating a “connections” website that would include information on projects, non-profits, and employers - helping bridge gaps between them. Again, such an effort raises questions about website ownership and maintenance.
- The possibility of connecting people through more storytelling events that simultaneously promote events happening in Bellevue. As such an initiative would be more focused locally and regionally, it would likely be outside the purview of Visit Bellevue. Instead, there would likely be a role for the City, Chamber, or BDA.
- A discussion about the need for a larger, coordinated communications plan to engage the entire community - residents, businesses, and employees - about important topics and potential projects. Such an effort would include more advocacy from businesses, especially tenants of office buildings, and engagement with residents to help them understand business and employee needs, with the overall goal of building greater understanding and sense of community between groups.
- A few attendees noted that this process is not entirely new. Bellevue has done a tremendous job of convening every 10 years to assess how the city is changing, identify new players and opportunities, and chart a path for the future. It was noted that this is a good time to be having these conversations and reevaluating how people and businesses organize in the city to be most effective.
- Much of the conversation focused on policy mechanisms to fund and implement ideas, particularly a business improvement district (BID). The pros and cons of BIDs were discussed in addition to how the community might go about establishing them if desired. It was noted that any BID must have a very specific goals, with clear potential benefits outlined. Unlike some communities, Bellevue would not be establishing a BID due to a crisis, but instead to address long-term, less visible potential challenges. As a result, it would require starting and facilitating a shared vision among property owners, tenants, and stakeholders.
- In general, businesses expressed a desire to see more amenities that make Bellevue a more compelling and exciting destination for employees, including more activated open spaces, farmers markets, community gatherings, food trucks, and other events to connect employees to the community.
- The discussion also explored what organization/entity might be able to convene disparate groups and help moves these conversation forward. The discussion centered on coalition building and creating space for dialogue between groups. As demonstrated by this focus group, the City may have to be the initial convener. The BDA was also discussed as a potentially strong convener, although somewhat limited by the Downtown name and geography. It was noted that more people need to be brought to the table for these discussions, including neighborhood associations and non-profits. Political leaders were identified as an important convener for residents.
- The group believes that clear action steps and ongoing communication are critical in activating this plan. A first step discussed was making a list of priorities, sharing the list, and articulating this capacity building need in a succinct way.

Bellevue's Economic Development Plan 2020 Update

JANUARY FOCUS GROUP SUMMARIES

Retail

During this focus group, the Avalanche consultants and participants continued a discussion focused on understanding challenges and opportunities for retailers, restaurants, related services, and those that support them in Bellevue.

The Avalanche team summarized key findings from the December focus group and then introduced some draft strategic ideas for discussion. City staff also attended this session to provide direct perspective in the workshop. Participants shared their thoughts on strategic ideas, explored how they might work operationally, identified existing related efforts on which to build, and brainstormed additional strategies.

The focus group discussion covered a range of topics, including:

- A need to better understand parking requirements of different types of businesses in different locations and potentially explore changes to code.
- Finding ways to connect businesses to clients - thinking about the expanding downtown population of residents and daytime workers.
- Considerations of the need for geographically targeted efforts around micro-neighborhood, including fostering connections among businesses, retailers, restaurants, and others located in immediate proximity to one another.
- Also brought up was how to create different, unique experiences across districts and neighborhoods.
- Improving connectivity between different districts of the city and marketing the highlights of each area.
- Expanding existing events and creating more community events in Bellevue. The conversation focused on expanding the Bellevue Jazz & Blues Festival, outdoor movies and concerts, the Farmers Market, other curated festivals and events. The group suggested creating an Events Coalition to bring together different venues and organizations to plan.
- Exploring different ways to connect people to physical spaces, including signage, wayfinding, and the possibility of digital connections.
- The feasibility of incentivizing development of smaller retail and restaurant spaces. For restaurants there was some discussion of spaces under 2,000 square feet and the importance of concepts.
- The need to build out more concentrated pockets of retail and restaurants in a contiguous manner. This type of less piecemeal retail development would help individual establishments thrive.
- The new Visit Bellevue shuttle service that will soon launch and whether it might be expanded in some manner if successful.
- Opportunities to proactively market Bellevue within the region to battle outdated misperceptions. The best way to change perceptions is to provide visitors with a positive experience.
- The importance of international tourists and what opportunities exist to build Bellevue's cultural currency and related skills.
- The idea of a BID to pay for programming and placemaking - especially downtown. It was noted that accomplishing this would require getting more local owners and businesses involved and excited about the idea.

Bellevue's Economic Development Plan 2020 Update

JANUARY FOCUS GROUP SUMMARIES

Small Business & Entrepreneurship

During this focus group, the Avalanche consultants and participants continued a discussion focused on understanding the challenges and opportunities for small businesses in Bellevue and how the City can help support existing business growth and new business formation.

The Avalanche team summarized key findings from the December focus group and then introduced some draft strategic ideas for discussion. City staff also attended this session to provide direct perspective in the workshop. Participants shared their thoughts on strategic ideas, explored how they might work operationally, identified existing related efforts on which to build, and brainstormed additional strategies.

The focus group discussion covered a range of topics, including:

- Startup 425 operations, offerings, and things they are exploring. The discussion included identifying efforts that are working well as well as exploring where there are gaps in available small business services and what new options might become.
- Some discussion centered on whether it is possible or desirable to create a "One-Stop-Shop" for information about small business resources. It was noted that no one organization can be the ultimate library of information and that whenever possible, it is preferred to connect with individuals in person to guide them to appropriate resources. Nonetheless, Startup 425 has produced an ecosystem map that might serve this purpose, but they determine the best manner in which to make it publicly available.
- There was exploration of whether the BDA or Chamber could have more of a small business focus, and it was noted that it has not traditionally been a role of the Chamber and the BDA's focus is downtown, which limits their reach. One Redmond also does some of this work already and could potentially play an expanded role.
- The group learned about the Enterprise Welcome Center pilot that is about to be launched through the King County Library System.
- When discussing accessibility of programs, the group noted that there is a need to offer programs and materials in more languages, but that the increased cost is challenging. Having more economic development information on public websites in different languages would be more welcoming and help connect people to the right person. Often the City's website is the first stop for information gatherers, and if materials are not immediately available in their native language, they may be dissuaded from exploring further.
- This conversation highlighted the overall importance of the approach to support services and how access is provided. A group participant noticed that the environment, the context, and the complexion of communication makes a huge difference in effectiveness.
- Startup 425 and other organization programs are generally designed to be accessible - offered near transit options, after normal work hours, and in public buildings, but there was some discussion of whether there could be more diverse startup focused events, such as social events for small businesses, multi-generational family events, and other pop-ups. The need for more virtual offerings of courses and programs also came up.
- The potential for more technical training for people starting businesses - thinking about e-commerce training, setting up a food truck, and other training that can help entrepreneurs think about the next step or utilizing new technology in the modern economy.
- The Innovation Triangle was discussed as an important marketing effort but not a specific resource for local businesses.
- The potential for a Buy Local Campaign came up, and the group reviewed past programs in Kirkland and Auburn. The noted challenge was maintaining a program after launch and who has ownership.
- There was also some discussion of how to help make it easier for businesses to receive certifications - especially minority certification status.

Bellevue's Economic Development Plan 2020 Update

2020 ECONOMIC DEVELOPMENT PLAN STAKEHOLDER OUTREACH

Retail

4Culture	Group	Rotary
Ascend Hospitality	Gunnar Nordstrom Gallery	Ryan James Fine Arts
Amazon	Half Note Music School	SAP Concur
Anchorhead Coffee	Hall Spassov Studio	Schwartz Brothers Restaurants
Art Space	Hanson Baker	Score Bellevue Clients
Ashmita Gulati	Heavy Restaurant Group	Seastar Restaurant and Raw Bar
Auth0	Hedge & Vine	Seattle Business Education Hub
Bake's Bar & Bistro	Hopelink	Sharon Linton
Bambu Bellevue	Inslee Best	Shunpike
Basta Boatlifts	International Ballet Theatre	Small Business Advisor
Bellden Café	Jacobs Engineering	Smartsheet
Bellevue American Music	John Howie Steak	SOFRITO, LLC
Bellevue Arts Museum	Kemper Development Company	Sophia Way
Bellevue Brewing	KidsQuest	Stacy Graven
Bellevue College	Kimco Realty	Startup425
Bellevue Chamber of Commerce	Kirkland Arts Center	Suite Restaurant/Lounge
Bellevue Downtown Association	Lora Martini	SweeneyConrad
Bellevue Piano Studio	Lunchbox Laboratory Bellevue	Symetra
Bellevue School of Rock	Lydia Aldredge	Taylor Shellfish Farms
BizDiversity	Maggiano's Little Italy	The Factory Recording Studios
Bling Bling	Main Street Association	The Lakehouse
Boeing	Maison de France	The Riveter
Boys and Girls Club	Maria Lau Hui	T-Mobile
Brazen Group	McCormick & Schmick's	Unique Art Glass
Cantinetta	Metro Seattle Chamber	Uwajimaya
Central Bar and Grill	mFilms	VALA
Coding Dojo	Microsoft	Visit Bellevue
Congregation for the Homeless	Mighty Media Studio	VMG Studios
CORT Event and Party Rental	Mike Lull Custom Guitars	Vue Art Gallery
CoworkBox	Musicworks NW	Vulcan
Creative Solutions	NerdstoGo	Wallace Properties
Crossroads	NewTech Northwest	Washington Federal
Diamonds, Inc.	Nokia - US/Bellevue	WebTitans
DigiPen	Northwest Guitars	Wee Tots
Do Me A Favor	NYB Gallery	WeWork
Dolce Bleu	OfferUp	Whisk
Donn Bennett Drum Shop	Ollie E's Southern Desserts	Wig Properties
Eastside Actors Lab	Overlake Hospital	Wild Ginger
Eastside Arts Collaborative	Paccar	WTIA Cascadia Blockchain Council
Eastside Pathways	Pacific Northwest Ballet	Wright Runstad
El Gaucho Bellevue	Paddy Coyne's Irish Pub	YMCA
Emerald Ballet Theatre	Palomino Rustico	Youth Eastside Services
ERIC	Paul Manfredi	
Eric Snyder Guitar Instruction	Peter Caruso Guitar Studio	
ESHC	Pogacha Restaurant	
Evergreen Association of Fine Artists	Port of Seattle	
Evolution Rehearsal Studios	Premiere Resources	
Extraslice	PromoShop	
Facebook	Puget Sound Energy	
First Western Properties	Puget Sound Properties	
Genevieve Trembley	Reality Breaks Escapes	
Glassy Baby	REI	
Greater Seattle Partners	Resonate Brewing	
Green Lake Jewelry Works	RMI	
Greggs Cycle	Rock-It Music Academy	