

A P P E N D I X A

E C O N O M I C D E V E L O P M E N T



Table A-1: Distribution of Jobs by Industry and Land Use

		Percent Distribution by Place of Work					
42	Wholesale trade	10%	85%	0%	0%	5%	100 %
44-45	Retail Trade	10%	0%	75%	0%	15%	100 %
48-49	Transportation & Warehousing	0%	75%	0%	0%	25%	100 %
51	Information	100%	0%	0%	0%	0%	100 %
52	Finance & insurance	100%	0%	0%	0%	0%	100 %
53	Real estate & rental & leasing	75%	0%	0%	0%	25%	100 %
54-55	Professional, Science, Tech Svcs, & Mgmt of Companies	90%	10%	0%	0%	0%	100 %
56	Administrative, Support, Waste Mgmt, & Remediation	30%	0%	0%	0%	70%	100 %
61	Educational services	5%	0%	0%	0%	95%	100 %
62	Health care & social assistance	50%	0%	0%	0%	50%	100 %
71	Arts, entertainment, & recreation	10%	0%	70%	0%	20%	100 %
72	Accommodation & food services	0%	0%	60%	40%	0%	100 %
81	Other services (except public administration)	20%	20%	20%	0%	40%	100 %
92	Government	65%	0%	0%	0%	35%	100 %

Note: (a) Includes schools, non -place-based workers, hospitals, home-based workers, and other assorted facilities. Sources: Labor Market Statistics from Florida Agency for Workforce Innovation, 2006; BAE, 2008.

Table A-2: Percent of Office and Industrial Jobs for ABAG Job Sectors, City of Novato (a)

		Office Based Jobs			Industrial Jobs		
		% of Total	% Office- Based	% Office-Based	% of Total	% Industrial	% Industrial-Based
Primary Industries (a)	# of Jobs (b)	Within Sector	Jobs (c)	Jobs within Sector (d)	Within Sector	Based Jobs (c)	Jobs within Sector (d)
Agriculture and Natural Resource Jobs							
11	Agriculture, Fishing, and Forestry	30	100%	20%	100 %	10%	
21	Mining	0	0%	15%	0 %	10%	
TOTAL		30	100%	20%	100 %		10%
Manufacturing, Wholesale and Transportation Jobs							
22	Utilities	27	2%	10%	2 %	55%	
31-33	Manufacturing	403	30%	20%	30 %	65%	
42	Wholesale trade	774	57%	10%	57 %	85%	
48-49	Transportation & Warehousing	148	11%	0%	11 %	75%	
TOTAL		1,352	100%	12%	100 %		77%
Retail Jobs							
44-45	Retail Trade	2,568		10%		0%	0%
Financial and Professional Service Jobs							
52	Finance & insurance	2,229	27%	1 00%	27%	0%	
53	Real estate & rental & leasing	427	5%	75%	5%	0%	
54-55	Prof, Science, Tech Svcs, & Mgmt of Companies	3,382	40%	90%	40 %	10%	
56	Admin, Support, Waste Mgmt, & Remediation Svcs	2,336	28%	30%	28 %	0%	
TOTAL		8,374	100%	75%	100 %		4%
Health, Educational and Recreational Service Jobs							
61	Educational services	468	8%	5%	8%	0%	
62	Healthcare & social assistance	2,047	34%	50%	34 %	0%	
71	Arts, entertainment, & recreation	610	10%	10%	10 %	0%	
72	Accommodation & food services	1,871	31%	0%	31 %	0%	
81	Other services (except public administration)	1,038	17%	20%	17 %	20%	
TOTAL		6,034	100%	22%	100 %		3%
Other Jobs							
23	Construction	2,061	45%	5%	45 %	15%	
51	Information	592	13%	100%	13 %	0%	
92	Government	1,881	41%	65%	41 %	0%	
TOTAL		4,534	100%	42%	100 %		7%

Notes:

(a) A BAG provides employment projections for six job sectors, each defined by the particular NAICS categories listed below the sector. (b) Employment data by NAICS category reported for the City of Novato, 3 Q 2 007, by California EDD. 2013 note: EDD no longer provides this data at the city level.

(c) The percent of office and industrial based jobs for each NAICS category estimated by BAE based on the profile of professions within each sector. See preceding Appendix table. (d) The percent of office and industrial based jobs for each major sector is the weighted average of the percent of office-based jobs for each NAICS category.

Sources: Association of Bay Area Governments, Projections 2007; California Employment Development Department, 2008, BAE, 2008.

Table A-3: Office and Industrial Job Projections for ABAG Employment Sectors, Novato

	% Office Jobs (a)	% Industrial Jobs (a)	2010			2035		
			Jobs	Office Jobs	Industrial Jobs	Jobs	Office Jobs	Industrial Jobs
Agriculture and Natural Resources	20%	10%	71	14	7	66	13	7
Manufacturing, Wholesale and Transportation	12%	77%	1,363	164	1,050	944	113	727
Retail	10%	0%	2,510	251	-	2,544	254	-
Financial and Professional Service	75%	4%	6,268	4,701	251	7,855	5,891	314
Health, Educational and Recreational Services	22%	3%	6,418	1,412	193	7,432	1,635	223
Other	42%	7%	4,263	1,790	298	5,032	2,113	352
Total Jobs			20,893	8,332	1,798	23,873	10,021	1,623

Notes:

(a) See preceding Appendix table.

Sources: Association of Bay Area Governments, Sustainable Communities Strategy, Preferred Scenario, v 20, May 24, 2013; BAE2008, City of Novato, 2013.

Table A-4: Total Potential Taxable Retail Sales, Novato, 2035

RECAPTURE OF SALES FROM EXISTING RESIDENTS BY 2035					
	CURRENT SALES		POTENTIAL SALES WITH RECAPTURE		NET ADDITIONAL SALES
Business Type	Total (a)	Per Capita (b)	Total (c)	Per Capita (d)	Total
Clothing & Clothing Accessory	\$38,663,958	\$744	\$52,670,211	\$1,013	\$14,006,253
General Merchandise	\$154,997,763	\$2,982	\$69,373,125	\$1,335	\$0
Specialty and Other Retail	\$81,847,986	\$1,575	\$65,477,557	\$1,260	\$0
Food Services and Drinking Places	\$74,564,737	\$1,435	\$95,041,181	\$1,829	\$20,476,444
Home Furnishings and Appliances	\$13,227,522	\$255	\$43,064,701	\$829	\$29,837,180
Building Material and Garden Equipment	\$17,572,006	\$338	\$40,983,508	\$789	\$23,411,502
	\$380,873,972	\$7,329	\$366,610,284	\$7,054	\$87,731,379

SALES FROM NEW RESIDENTS BY 2035		
Business Type	Total (e)	Sales Per Capita (f)
Apparel	\$4,204,624	\$1,137
General Merchandise	\$4,102,072	\$1,109
Specialty and Other Retail	\$7,038,092	\$1,903
Food Services and Drinking Places	\$6,684,858	\$1,807
Home Furnishings and Appliances	\$3,612,102	\$977
Building Material and Garden Equipment	\$3,813,408	\$1,031
Total	\$29,455,156	\$7,963

TOTAL POTENTIAL SALES BY 2035	
Business Type	Total (g)
Apparel	\$18,210,877
General Merchandise	\$4,102,072
Specialty and Other Retail	\$7,038,092
Food Services and Drinking Places	\$27,161,302
Home Furnishings and Appliances	\$33,449,282
Building Material and Garden Equipment	\$27,224,909
Total	\$117,186,535

(a) 2011 taxable sales data from CA BOE, inflated to 2012\$.

(b) Novato population, 2011, per CA Department of Finance: 51,970

(c) Equal to Sales per Capita for Bay Area, multiplied by number of Novato residents in 2011 .

(d) Equal to greater of 2011 Sales Per Capita for Bay Area or 2011 Sales per Capita for Novato (both inflated to 2012\$).

Assumes Novato will continue to achieve current per capita sales or increase sales to Bay Area benchmark, whichever is greater.

(e) Equal to Sales per Capita, multiplied by projected net new residents in Novato, through 2035, per ABAG. Net new residents : 3,699

(f) 2006 Sales Per Capita for Marin County (inflated to 2008\$). Assumes new Novato residents will more closely match countywide residents, and will therefore have similar retail spending patterns.

(g) Sum of Net Additional Sales from Existing Residents and Total Sales from New Residents.

Sources: California State Board of Equalization; Association of Bay Area Governments, 2013; California Department of Finance; City of Novato Community Development Department, 2013.