



CITY CENTER PLAN UPDATE PHASE 1 VISION REPORT

February 2020



ACKNOWLEDGEMENTS

The City of SeaTac wishes to thank and acknowledge all of the individuals and groups who dedicated their time and energy to the creation of this shared vision.

WORKSHOP ATTENDEES

Cathy Boysen Heiberg
Boysen & Boysen, LLC.

Larry Heiberg
Boysen & Boysen, LLC.

Perry Wall
Clarion Hotel SeaTac

Mark Hollander
Crowne Plaza Hotel

Ken Stockdale
Crowne Plaza Hotel

Wes Wood
Dollar Development

Richard Scherzinger
Hilton Hotels

Dan Watson
King County Housing Authority

Charles Bassett
L&R Group/Wally Park

Roger McCracken
Master Park

Tom Hooper
Port of Seattle

Stan Tombs
SeaTac City Council

Carl Cole
SeaTac City Manager

Clyde Hill
SeaTac Deputy Mayor

Erin Sitterley
SeaTac Mayor

Tej Basra
SeaTac Planning Commission

Katherine Kertzman
Seattle Southside Regional Tourism
Authority

Mara D'Angelo
Sound Transit

Thatcher Imboden
Sound Transit

Katie Drewel
Sound Transit

Pat Callahan
Urban Renaissance Group

JoLene Parks
Urban Renaissance Group

FOCUS GROUP PARTICIPANTS

Sea-Tac Airport Workers
Windsor Heights Residents
Bow Lake Mobile Home Park Residents

OPEN HOUSE ATTENDEES

Tyee High School Student Group

Don Brooks

Neal Ball

Sam Dereese

Paul Jackson

Roger Kadeg

Stan Benson

Rosalyn Jonas

Charles Seitz

Ine Boysen

Christina Palicka

Harriet McMillon

Brittany Steward

Kathryn Roberts

James A Maga

Virginia Olsen

Rita Marlow

Katherine & Drake Pesce

Michael J. Thornton

Ronny Seldal

Mary Hoey

Robert Merlino

Sallie Palella

Carey Douglas

Pattie Goodall

Siddie McCollum

Vicki Lockwood

Earl Gipson

Dave McMullen

Maile Valu

Toka Valu

Stan Tombs

Wesley Gibbs

Michael J West

Christina Boysen Palicka

Luke Irwin

Kathy Unmuth

Taryn Hill

Carolyn Cloutier

Ted Marlow

CITY OF SEATAC CITIZEN ADVISORY COMMITTEES

Hotel/Motel Tax Advisory Committee
Planning Commission

CITY OF SEATAC TECHNICAL ADVISORY COMMITTEE

Steve Pilcher

Director of Community & Economic
Development

Jennifer Kester
Planning Manager

Aleksandr Yeremeyev
Economic Development Manager

Kate Kaehny
Senior Planner & Project Manager

CONSULTANT TEAM

BDS Planning & Urban Design

Brian Scott

Gabriel Silberblatt

Ishmael Nuñez

Dan Lolic

Toole Design

Amalia Leighton-Cody

Katherine Knapp

E D. Hovee & Company
Eric Hovee



PLAN ON A PAGE

PURPOSE

The City Center Plan Update Phase 1 Project Vision Report is written to document consensus about a path forward for the district. This document charts a shared vision for the City Center area that brings together diverse perspectives of people who care deeply about the future of the area. The Vision, Principles, and Objectives in this Report have support from SeaTac's elected representatives, major private and public stakeholders, the broader community, and City staff. Agreement on these shared elements creates a strong critical foundation for the next phase of planning work that will occur in Phase 2.

VISION

The global gateway to the Pacific Northwest, SeaTac Landing* is an active hub providing residents, workers, and visitors alike with a diverse set of experiences in an enticing, contemporary, and walkable urban district.

PRINCIPLES

- Economic Prosperity
- Attractive Public Realm
- Mix of Complementary uses
- Efficient Circulation

NEXT STEPS

- Completion of Phase 2 sub-area Plan

NEAR TERM PROJECTS

- International Boulevard Corridor Safety Study
- Station area pedestrian access improvements
- Continued communication and coordination with stakeholders to complete phase 2 and explore the potential formation of a business improvement association or some other such group.



SeaTac City Center Boundary

This 350 acre district is located in central SeaTac, immediately adjacent to the airport and SeaTac/Airport light rail station, with boundaries extending along the International Boulevard corridor from S 188th Street to approximately S 166th Street.

* "SeaTac Landing" is the Phase 1 name of the district.
The final name will be confirmed as part of the Phase 2 planning process.

PROCESS

This focused six-month planning process was designed to engage a breadth of important local voices.

Before the process formally began, City Planning Staff worked with students from Tye High School's Advanced Marketing Class on various activities including creating infographics, collecting questionnaires and doing a "walking audit" to learn about the area.

Once the BDS Planning team was brought on board, the consulting team conducted confidential interviews with many private and public stakeholders to learn about their candid assessments of the district. While the consulting team developed current economic and transportation assessments of the district, **three targeted focus groups were convened to hear from district voices that are often harder to hear:** 1) airport workers, 2) residents of Windsor Heights Apartments and 3) The Bow Lake Mobile Home Park Home Owners Association. Core overlapping themes that emerged from all of the focus groups were:

- The need to strengthen district identity and brand
- Pedestrian access to key regional transportation assets
- Lighting in public spaces as a personal safety issue
- Importance of naturally occurring affordability
- A desire for aesthetic enhancements that would foster community pride



Tye HS Students' Walking Audit



Airport Workers Focus Group



Windsor Height Focus Group

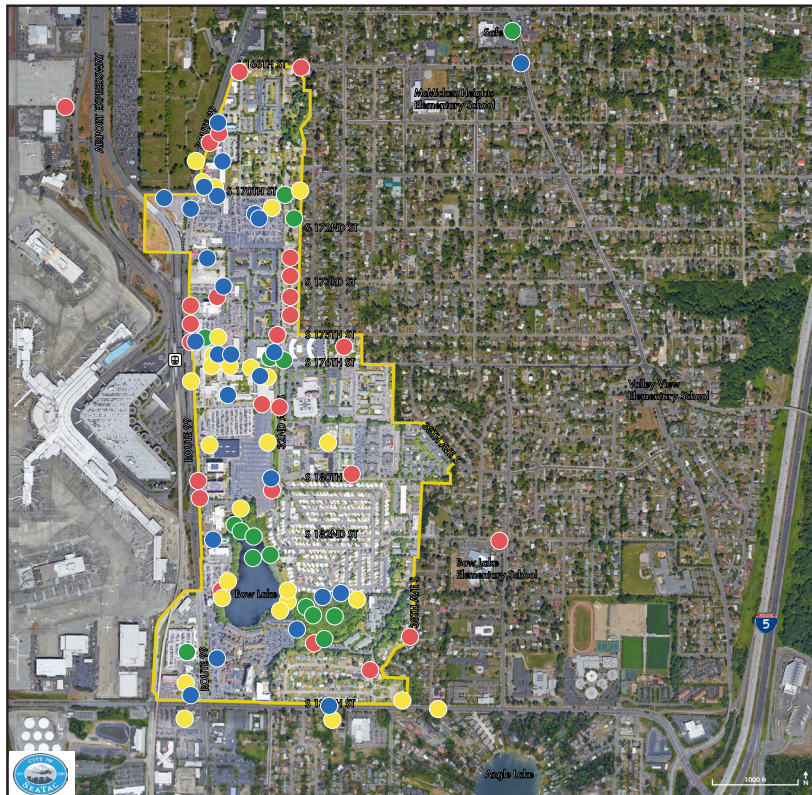


A community Open House was held at McMicken Heights Elementary School on October 23, 2019. Participants were asked to provide their values, fears, priorities, and a one-word description of the City Center. They were also able to provide feedback through the interactive mapping exercise, and mapping stations focused on vehicular and pedestrian constraints and opportunities.

Participants' most valued aspects regarding the district converged among four themes 1) Access to transit/light rail; 2) An inviting environment for residents and visitors; 3) A variety of shopping opportunities; and 4) a focus on community and local residents.



October 3 Open House



QUESTIONS:

- Where would you like to be able to shop?
- Where would you like to be able to eat?
- Where would you like to be able to play/recreate?
- Where could sidewalks be added or improved to make walking easier?

LEGEND:

- Seatac City Center Boundary

Consolidated responses from all community engagement activities



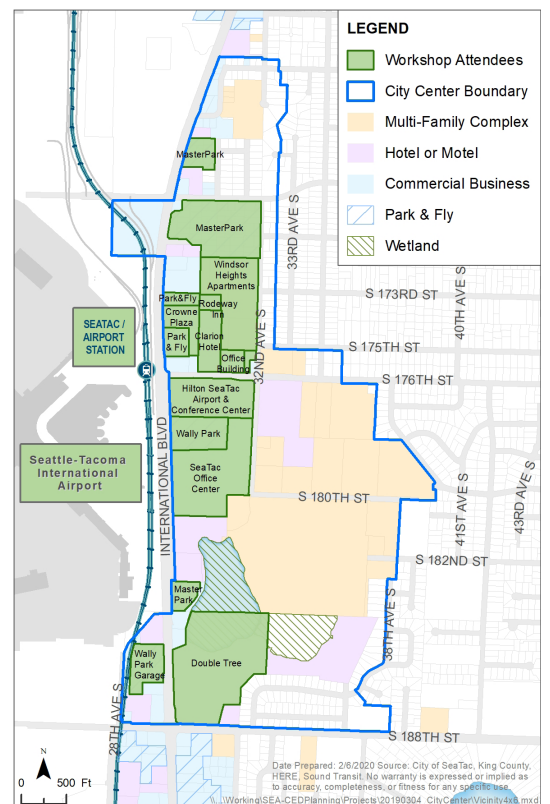
Armed with this detailed input from the focus groups and community open house, the consulting team convened a stakeholder workshop comprised of property owners and public partners who have a vested interest in the vitality of the district. During the workshop on November 26th, 2019, attendees received a presentation from the consultant team describing the outcomes of stakeholder and community engagement, as well as the technical assessments of BDS (Urban Design), E.D. Hovee (Economics), and Toole Design (Transportation Infrastructure).



November 26 Stakeholder Workshop

The consultant team identified two distinct sub areas within the City Center area of study—one focused on residential and another on more intensive commercial uses. The map on page 9 depicts the general boundaries of these sub-areas. The consultant team then presented a draft vision and principles for the district which was referred to as **“SeaTac Landing”** by the consulting team.

Having achieved consensus around the high level vision and principles for the district, workshop attendees broke into small groups to offer their specific ideas about necessary priority outcomes (in Urban Design, Transportation, Economic Development, and Implementation) that would be necessary in the next five years in order to make collective progress on achieving the Vision. The consulting team synthesized these priority outcomes into the objectives that appear in the following section and worked with the City of SeaTac to identify actions that should be taken in the near term to tackle them.



Map of Workshop Attendees

The global gateway to the Pacific Northwest, SeaTac Landing* is an active hub providing residents, workers, and visitors alike with a diverse set of experiences in an enticing, contemporary, and walkable urban district.

PRINCIPLES

1

Economic Prosperity

Prosperity for all is achieved through improved land value, more diverse employment opportunities, and increased tax revenue.

2

Attractive Public Realm

The comfort, quality, and programming of streets and public spaces entices people to come out and linger in the district.

3

Mix of Complementary Uses

Development supports a mix of office, lodging, retail, and airport service uses that are mutually supportive of one another.

4

Efficient Circulation

Access to and between major activity centers limits congestion and maximizes mobility for all modes, including air.



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DISTRICT URBAN DESIGN CONCEPT

In accordance with the district Vision and Principles, this section describes a consensus urban design concept for the district. In short, the concept is for a district that sustains two sub areas with distinct characters: an urban, airport-serving, and mixed-use district along International Boulevard (mapped orange) and a residential area stepping down in intensity to meet the single family neighborhoods at the eastern-most boundary (mapped yellow).

Airport Business District

The western portion of the district fronting International Boulevard should develop as a mixed-use “aerotropolis” (or airport city) where each new development provides added incentive not just to pass through – but linger. Class A office space, conferencing, traditional and flexible lodging, and dining/entertainment/small retail will establish SeaTac as the complete one-stop package deal. Specific market-driven opportunities for this concept are:

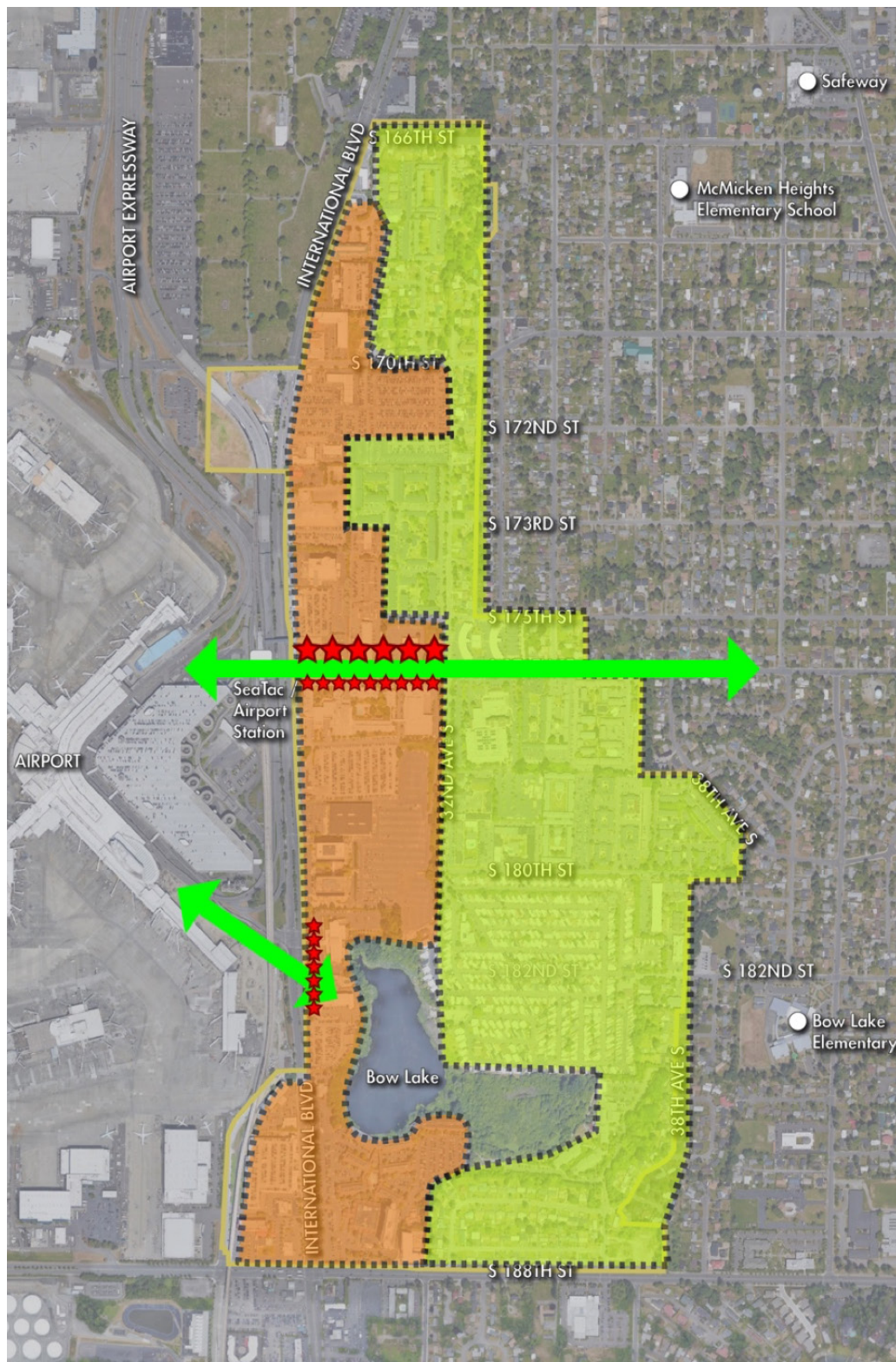
- Improved linkages with the airport to better connect airport visitors and workers with the district’s airport services – specifically including lodging, extended stay, convenience retail/dining and park & fly.
- Expanded office employment for businesses with global footprint and as an emerging southside Class A office cluster.
- Preparation for potential reduction in future parking demand with changes in vehicle technology and consumer preferences – eventually freeing up land for other airport and community driven transit-oriented and mixed-use development concepts.

In the urban design concept map on page 9, red stars indicate the location of near-term priority actions. These areas indicate locations where retail service hubs, pedestrian improvements and redevelopment consistent with the Vision and Principles will be essential to building broader momentum for the district. The larger red stars indicate greater near term potential for pedestrian-oriented services. Similarly, the green arrows indicate special focus for right of way improvements and district access based on current and future pedestrian activity.

Residential Multi-family

The multi-family residential area away from the International Boulevard corridor (mapped yellow) currently provides housing that is affordable and allows many airport and service workers easy access to their jobs and transit. The urban design concept for future development in this area is to remain consistent with the existing multi-family, better served by improved and added sidewalks, street infrastructure, and lighting. Wherever possible, residential developments should become more connected by public right of way or privately owned and maintained areas.





Legend

- Airport Business District
- Residential District
- Retail service hub locations

SeaTac Landing Sub-Districts

OBJECTIVES & ACTIONS

The following section describes objectives for the district that are consistent with the vision. Objectives are concise outcome-oriented statements organized within four categories: Urban Design, Transportation, Economic Development and Implementation. Each objective is accompanied by one or more specific actions that should be taken to help realize this priority for the district.

Urban Design

1. Enhance image and aesthetics of district

- Confirm name and brand for district to establish a consistent image and urban design for public spaces and new development
- Improve wayfinding and visual continuity throughout district, including between district and airport
- Explore role of public art in enhancing district
- Identify public realm improvements through the creation of streetscape design guidelines, and install design treatments (i.e. pedestrian lights, street furniture, wayfinding/signage, and public art)

2. Identify potential gaps in open space, including locations for recreation and gathering

- Ensure coordination between Phase 2 sub-area planning process and Parks, Recreation and Open Space (PROS) Plan Update project

3. Activate public and private spaces with programming

- Identify potential short-term uses (i.e. food trucks and cultural events) to activate and draw interest in district

4. Refine urban design framework to ensure consistent urban form throughout district

- Add more detail to urban design concept in Phase 2 to ensure appropriate urban form in all district locations, including retail-service hubs (activity centers) on S 176th Street and along International Blvd near S 182nd Street
- Update current design standards to match adopted vision



Transportation

1. Improve traffic flow and maximize mobility for all modes of transportation

- Explore strategies to ease congestion, enhance vehicle and pedestrian connections throughout the district and increase access to and from parcels

2. Enhance comfort and experience of walking

- Identify appropriate sidewalk improvements that address pedestrian safety including the type and design of pedestrian facilities
- Develop and implement a pedestrian lighting plan
- Study locations of pedestrian facilities on west side of International Blvd
- Address the cleanliness and maintenance of public and private spaces

3. Improve crossings of International Blvd between the airport and the district (especially at S 176th and S 182nd)

- Explore options to enhance safety and mobility for all modes including such things as grade separation of pedestrians

4. Ease flow of traffic by encouraging access through and between private property wherever possible

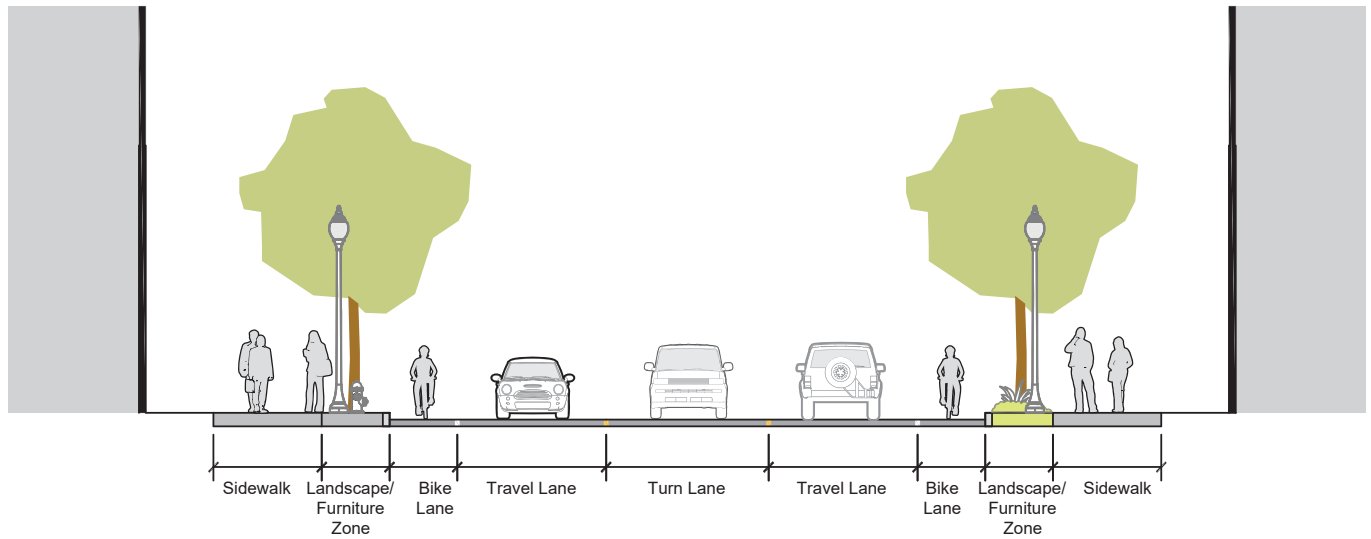
- Identify strategies to incentivize improvements to access through and between parcels as properties are redeveloped

5. Explore alternative strategies for mobility within and throughout the district

- Identify how new or alternative transportation methods could improve mobility such as shuttle programs or the potential of autonomous vehicles or other methods or technologies

6. Ensure Public Works funded projects within district help implement the community-stakeholder supported vision for district

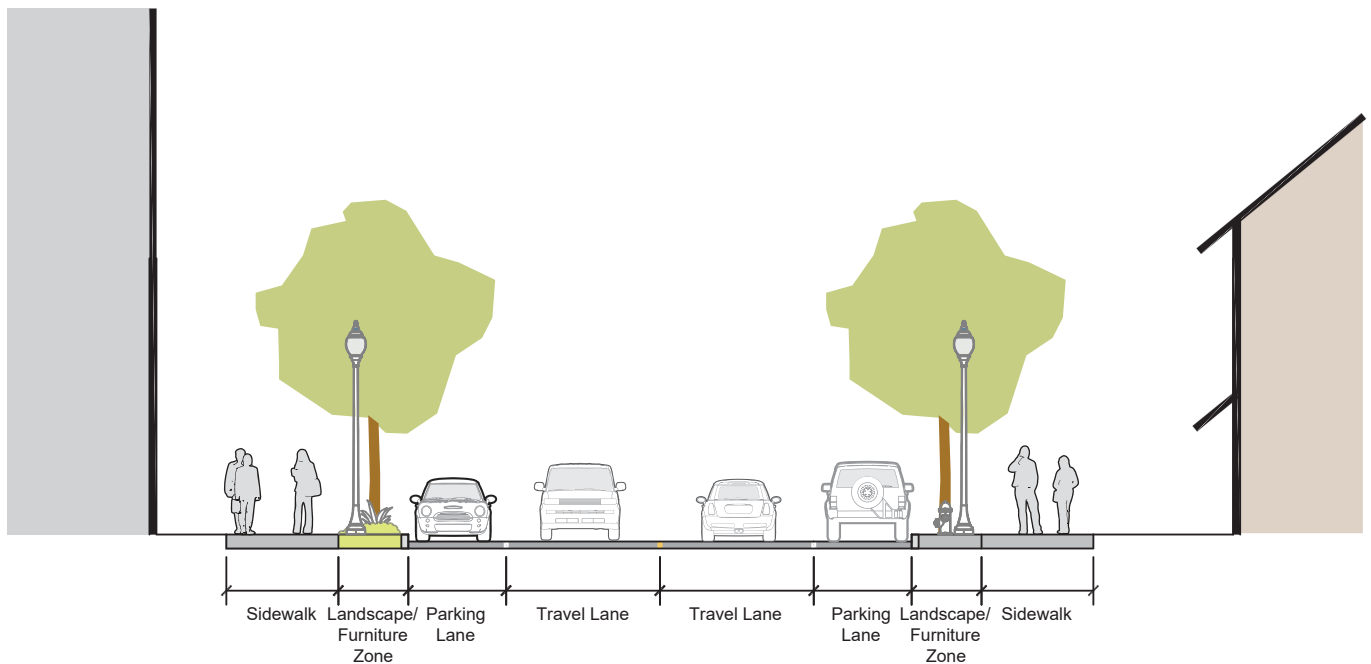
- Continue inter-departmental coordination of projects to ensure alignment of transportation infrastructure projects with vision for the district
- Ensure funding for pedestrian light standards allocated as part of currently funded projects



Elements on Arterial Street

* All facilities shown in the street concept may not fit within existing right-of-way

Toole Design, 2020



Elements on Local Street

* All facilities shown in the street concept may not fit within existing right-of-way

Toole Design, 2020

These street images are illustrative concepts that identify the types of facilities that would implement the vision



Economic Development

1. Pursue economic development activities that strengthen the airport business district on the west and neighborhood district to the east

- Identify programmatic, regulatory, infrastructure and other City actions that promote existing and potential uses that enhance the airport business district and adjacent neighborhood district
- Explore opportunities to expand office development and the branding of the district as a south end regional office center
- Pursue options to incentivize mixed use hotel/commercial/office or other mixed use development, e.g. through pilot programs that explore things like the streamlining of regulatory and environmental review
- Analyze the need for workforce housing and other affordable and market rate options and identify a strategy that provides a variety of residential opportunities for diverse income levels
 - Study items should include residential opportunities, displacement risks/mitigation, housing/amenity strategies (and how they are connected)

2. Promote retail/service hubs (activity centers) along S 176th near International Blvd and along International Blvd near S 182nd St

- Identify strategies to encourage the development of restaurants, shops and other pedestrian-oriented services along S 176th and near the intersection of S 182nd & International Blvd

3. Encourage businesses and services that address and leverage the needs of visitors, workers and residents

- Examine strategies that promote co-location of airport-related uses with shopping, restaurant and other retail services
- Explore a food hall concept with multi-cultural foods for siting small, local business incubation (food and culture)

4. Identify redevelopment opportunity sites

- Conduct opportunity site analysis to understand potential redevelopment options of district properties
- Identify goals for long term use of Sound Transit Kiss & Ride site

5. Explore how to allow pilot projects that can catalyze other development and the implementation of community-stakeholder vision

- Study the creation of a pilot programs that promote development such as the utilization of development agreements or other mechanisms, including those that promote innovative development/design

6. Explore branding/marketing options for district

- Identify funding needs and benefits of branding/marketing plan and undertake creation of plan as appropriate



Planning/ Implementation

1. Fund Phase 2 to complete a sub-area plan to ensure that:

The community-stakeholder supported vision for the district is implemented

The existing City Center Plan and associated zoning code overlay district and repealed and replaced

- Identify scope of work and funding needs and obtain City Council approval for Phase 2 sub-area plan and zoning update project
- Phase 2 should include sufficient funding for zoning code/overlay district update to address:
 - Potential changes to parking requirements, especially in regards to hotels
 - Urban landscape standards that are more appropriate for area
 - Missing uses in use charts, such as doggie day care
 - Other code changes that better implement the community-stakeholder supported vision for district
- Explore viability of SEPA Planned action for sub-area plan

2. Organize business interests for an intentional and coordinated focus on implementing community-stakeholder supported vision of district

- Identify approach for on-going stakeholder engagement and potential formation of business improvement association or other such group



Pedestrians along International Boulevard in front of Airport Hilton

APPENDICES

List of appendices for Phase 1:

Appendix A:

Market Opportunities Assessment

- SeaTac City Center Economic Opportunities Review (E.D. Hovee & Company, LLC)

Appendix B:

Infrastructure Opportunities Assessment

- SeaTac City Center Area Transportation and Utility Infrastructure Analysis
Needs Assessment and Opportunities (Toole Design)

Appendix C:

Community Engagement

- Community/Stakeholder Engagement Record of Activities
- Tyee High School Student Project Presentation
- Comments from Attendees of Community Planning Meetings #1 & #2
- Responses to On-line Project Questionnaire
- Community Engagement Summary
- Stakeholder Workshop Summary



Signage at transit plaza on International Boulevard and S 176th Street





CITY CENTER PLAN UPDATE PHASE 1

APPENDICES

February 2020

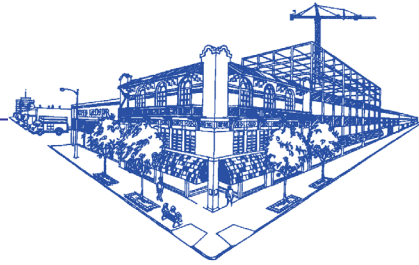
APPENDIX A:

MARKET OPPORTUNITIES ASSESSMENT

- SeaTac City Center Economic Opportunities Review (E.D. Hovee & Company, LLC)

E. D. Hovee & Company, LLC

Economic and Development Services



MEMORANDUM

To: Brian Scott
BDS Planning & Urban Design

From: Eric Hovee

Subject: SeaTac City Center Economic Opportunities Review (Revised)

Date: November 19, 2019

On behalf of the City of SeaTac, BDS Planning & Urban Design is providing preliminary urban design framework services. A key component of this sub-area planning process involves a review of existing market studies and preparation of an economic opportunities report. This background report is prepared for BDS and the City of SeaTac by the economic and development consulting firm E. D. Hovee & Company, LLC.

This economic opportunities report is organized to cover the following topics:

At-A-Glance Summary
Review of Existing Market Studies
Demographic & Economic Update
Framing Opportunities
Next Steps

Information regarding preliminary redevelopment site identification and property validation will be provided as part of next step deliverables.

Please consider this as a revised draft report subject to review by BDS and the City of SeaTac. Further revisions may be made with to address remaining questions and comments received.¹

AT-A-GLANCE SUMMARY

In conjunction with urban design framework services, an updated economic opportunities analysis is being conducted for City Center SeaTac. Observations and findings from work completed to date area summarized as follows.

Review of Existing Market Studies. An initial step taken with this analysis has been to briefly review seven City Center and related market studies conducted for SeaTac over the last two decades – building from rather than re-inventing initiatives previously taken. Key findings from this review of prior market studies are three-fold:

- Consistently expressed are themes of **airport-oriented** lodging and park-fly operations as continuing opportunities, offset by more limited opportunities for retail and dining.
- There are mixed opinions as to realistic prospects for **office, housing and mixed-use**, together with questions as to whether market rents will support costs of development.
- True City Center **transit-oriented development (TOD)** has yet to materialize and continues to represent a missed economic opportunity for SeaTac and the metro region.

Demographic & Economic Update. Three market geographies have been utilized for comparative purposes with this analysis – the City Center plan subarea (with 5,600 residents estimated as of 2019), entire City of SeaTac (population 29,180) and a greater SeaTac (south end) market area (of 298,500 residents):

- City Center **population** tends to be growing more slowly but is younger, more diverse, less educated and with lower incomes than the city and greater market area.
- City Center **households** are evenly split between family and non-family living, with high proportions of 1-person households, with two-thirds as renters and multi-family residents. Residential construction has lagged behind the rest of the city in recent years.
- PSRC data indicates that SeaTac has an **employment** base of an estimated 34,140 jobs as of 2018 – an increase of 4,220 jobs (+14%) in just the last three years since 2015. The primary source of this reported job gain has been with wholesale and transportation related activities – focused around the Sea-Tac International Airport.
- As of 2015 (the latest year with comprehensive data for a sub-city geography), U.S. Census data indicates that the **City Center** accounted for about 14% of jobs city-wide – focused in hospitality and management/administrative jobs, albeit with relatively lower wages and with somewhat younger workforce than is the case city-wide (as with airport-related employees just west of the City Center subarea).
- The greater SeaTac market is well served with **retail** overall – with retail sales that exceed resident-generated demand alone. Overall City Center capture of this southside market is relatively small – peaking at a 4% share of the market for dining. The best opportunities are likely to be for businesses that cater both to destination hospitality and local resident/employee needs – in a pedestrian-scale, TOD mixed-use setting.

- When viewed in terms of **current rents** (including lodging rates), SeaTac consistently underperforms the metro market across apartment, retail, office, and hotel product types – making it difficult for new construction to demonstrate project feasibility. Market feasibility may increasingly require a more diverse set of urban mixed-use development concepts – attracting rents closer to market averages.
- For SeaTac’s City Center, **mixed use** may include residential above commercial but also other formats including mixes of retail, office, conferencing, hotel, and extended stay concepts with structured parking. The SeaTac market will remain airport-driven – with as yet untapped potential as a globally significant airport city.

Framing Opportunities. Among urban centers in the Puget Sound region, SeaTac is presented with a unique set of market opportunities predicated on *network effects* – as a real estate product or service that can yield greater value with customer use and cross-shopping. As airport usage increases, there is correspondingly greater demand for airport support services – notably lodging, extended stay residential, parking, dining, entertainment and convenience-oriented services.

This cumulative value is best captured when seemingly disparate real estate products and customers are linked (or networked) – making it ever easier for airport users, employees, and residents to each layer in their share of spending potential. An *aerotropolis* (or airport city) concept is one where each new development provides added incentive not just to pass through – but linger. Provide office space, conferencing, traditional and flexible lodging, and dining/entertainment with SeaTac as the complete one-stop package deal.

This approach requires investors and developers willing to step out beyond the tried and tested. Whether and how this might be applicable for SeaTac can be further explored in subsequent project work tasks involving preparation of a vision statement and urban design concept based on community and stakeholder input including a City Center charrette process. To summarize, pivotal market-responsive economic development opportunities ahead include:

- Improved linkages with the airport – specifically airport services including lodging, extended stay, convenience retail/dining and park & fly.
- Expanded office employment for businesses with global footprint and as an emerging southside Class A office cluster.
- Preparation for potential reduction in future parking demand with changes in vehicle technology and consumer preferences – eventually freeing up City Center land for other airport and community driven transit-oriented and mixed-use development concepts.
- Short-term opportunity for more intensive residential and neighborhood commercial uses within the portion of the City Center area away from International Boulevard.

Next Steps. This economic opportunities review will be refined in response to charrette discussion and refinement of a design framework going forward. An added next step will be to identify and validate realistic site development opportunities.

REVIEW OF EXISTING MARKET STUDIES

An initial step taken with this economic opportunities report is to review other City Center and related market studies conducted over an approximate two decade time period including:

- SeaTac TOD review (1998)
- SeaTac Station Area Market Analysis (2005)
- SeaTac Economic Development Project (2004-06)
- SeaTac LRT Station Area Economic Benefits Analysis (2009)
- 2010 Streetsense Station Area Market Study
- South 200th Station Area Market Report (2012)
- Sea-Tac International Airport Economic Impacts (2018)

While some conditions have changed, these reports remain useful to set a broader city- and region-wide context from which to better understand SeaTac's competitive market strengths and challenges. This review aims to identify which of the *takeaways* remain important today and which have been supplanted or modified by changing conditions locally and regionally – especially in the wake of the Great Recession, ensuing recovery and now re-normalized growth opportunities. The aim is to build from rather than re-invent initiatives previously taken.

Each report is briefly reviewed with summary observations, in turn.

SeaTac TOD Review (1998)

A draft report titled *SeaTac Segment of LINK Light Rail Market Review and Assessment of Transit Oriented Development Opportunities* was prepared for the City of SeaTac by Berk & Associates, Inc., September 1998. The purpose of the memorandum report was to provide background information, enabling alternative development scenarios to be prepared for the City Center Plan – specifically the types of transit-oriented development (TOD) opportunities that could occur at each station site.

Key market sectors addressed included hotel/hospitality, commercial parking, office space and retail sales. Station sites considered at the time were a north station (at S 160th Street), north central station (170th), south central station (188th), and 200th Street. Of these sites, 160th and 200th are outside the current City Center study area; only one station at 176th was constructed as the SeaTac / Airport light rail station.

Growth projections were made for each ¼ mile station area to 2020 with and without transit. While considerable development was forecast even without transit, relatively little added development was forecast with transit. For the north central station, the TOD “bump” was only an added 14% in employment and less than 1% increase in housing units as compared to without transit conditions. The impacts of transit on residential development, in particular,

were described as “relatively minimal” because the then proposed 170th station area was already designated for future residential development.

Similar forecast results were noted for a potential south-central station at 188th. Forecast 2020 employment gains with a 188th transit station at International Boulevard would be 12% greater and housing development no different than if light rail transit was not implemented. An overall conclusion of the report was that light rail might not provide much impetus for net added commercial or residential growth (beyond what was already allowed by existing zoning). However, the report also concluded that: “The presence of light rail offers opportunities to possibly attract a higher income demographic, as has been evidenced in other communities, and more generally as an additional amenity to help the City achieve its GMA housing goals.”

SeaTac Station Area Market Analysis (2005)

In December 2005, Community Attributes provided a draft *SeaTac Station Area Action Plan Market Analysis and Development Considerations report to the City of SeaTac*. The report focused on relocation station site opportunities at 154th Street in Tukwila and at 176th Street in SeaTac’s City Center (as were later constructed). The analysis concluded that:

- Additional lodging focused toward a more upscale market segment appeared to be the best opportunity for the SeaTac station area of the uses considered.
- Training centers were noted as an emerging new use based on early success of the then operating Washington Mutual Training Center – or possibly a multi-tenant version of WaMu “with tenants leasing private spaces and sharing classroom and lodging space.”
- Conversion of surface to structured parking was viewed as potentially viable – as “SeaTac land values are at a tipping point to support structured parking” but dependent, in part, on co-location with higher-end lodging to better cover structured parking costs.
- Market factors favored potential office development – as for a major corporate headquarters or similar anchor – but would require rental rates above what the market then supported.
- Studio residential generated “significant interest by developers and stakeholders” – especially if “bundled” with lodging units for airport crews and related workers valuing immediate airport access – but with feasibility hampered by below market rental rates in the SeaTac area.
- Retail was viewed as most feasible when developed as “a relatively minor but supporting use for lodging, office, or other (e.g. residential)” – with SeaTac opportunities further limited by existing destination retail in the Tukwila urban center.
- Mixed use development was described as “always difficult,” otherwise receiving limited consideration in this 2005 market report.

SeaTac Economic Development Project (2004-06)

Over a two-year period, E. D. Hovee & Company prepared a business “icon” and targeting program for the City of SeaTac. Key business clusters for which current or prospective competitive advantage were identified for SeaTac included:

- **Hospitality** – including entertainment, dining, convenience and specialty retail focused on the International Boulevard corridor (in both single and multi-tenant configurations), expanding and diversifying current offerings while improving the quality of the visitor experience.
- **Corporate Office** – focused on potential business icons including end-user/ build-to-suit projects identified in cooperation with regional brokerage and development interests.
- **Mixed Use** – to serve hospitality-related dining, retail and entertainment together with mid-high rise corporate office and exploration of residential/mixed use potential.
- **Air Logistics** – in partnership with the Port of Seattle, involving potential development of aviation commercial sites.

While the geographic area covered was the entire City of SeaTac, three of the four targeted business clusters were directly focused on the City Center area. Air logistics activity involved properties to the west of International Boulevard but with indirect opportunities for professional and trade-related firms supporting the airport logistics activity.

Stakeholder involvement included property owners and developer interests, Hotel-Motel Advisory Committee and City Council review. Key project deliverables were a business prospectus, business icon contact database, and an implementation plan with a business marketing program.

By Resolution #05-020, the Council on November 22, 2005 authorized the preliminary reservation of up to \$18.3 million in funding for public use and purpose as economic development incentives for qualified mixed-use financing. Separately provided was assistance in a business ambassador program to market SeaTac properties to interested end users and development clients. In the last phase of the project, principal Eric Hovee conducted confidential interviews with City Council members regarding development negotiations for two mixed use proposals being considered by the City pursuant to the RFP process, including financial evaluation and comparison of the two proposals.

SeaTac LRT Station Area Economic Benefits Analysis (2009)

Community Attributes (CAI) completed a third draft *City of SeaTac Light Rail Transit Station Area Economic Benefits Analysis* in March 2009. The purpose of the report was to describe “anticipated fiscal revenues, along with jobs, wages and additional benefits anticipated to come with station area absorption and development” at the 154th SeaTac Airport station areas.

CAI forecast that development at the Airport Station could increase from:

- 340 residences already in place to 726 housing units with implementation of the Station Area Plan.
- Increase from 1.45 million square feet of non-residential space to 1.96 million with Station Area Plan implementation
- Increase from 957,000 square feet to 2.758 million square feet of commercial and business parking use.

The net increase in municipal (property tax, sales tax, building permit and other general fund) revenues would be \$2 million as a one-time benefit from construction and \$2.1 million per year from added on-going business and residential use.

The report comprised a build-out plan rather than market analysis. Also noted is that the report did not attempt to distinguish between development expected to happen as a result of in-place zoning (without LRT) versus the added increment of development resulting from the anticipated transit investment.

Streetsense Station Area Market Study (2010)

The firm Streetsense completed a *City of SeaTac Station Area Market Study*, January 26, 2010 – the purpose of which was to identify and quantify existing and future demand in the SeaTac Station area. The analysis was “geared toward the potential SeaTac Airport Retail, Dining, and Entertainment District.”

The market study identified both primary and secondary trade areas for purposes of analysis. These were the areas viewed as posing “the most direct competition to the Station Area as well as the area from which the area has the highest potential for drawing consumer expenditures.” The geography covered by the secondary trade area defined by Streetsense is again utilized with this 2019 updated market analysis, as described later in this memorandum.

Key observations or “population principles” of the Streetsense report were two-fold:

- 1) Less-than-stellar demographics do not make successful development impossible in this area. It just means that price-point must be carefully considered.
- 2) The opening of the SeaTac/Airport Central Link light rail station will impact this market significantly; however, the degree to which it will do so is virtually impossible to quantify, especially when the station is not yet open and ridership numbers are just projections. We would recommend doing intercept surveys with light rail riders to help form a vision for the Station Area.

Preliminary summary conclusions by real estate product type for the station area were as follows:

- If amenities and pricing were right, a small amount of 200-250 multi-family units could be supported for “a very particular population including airport employees.”
- There is opportunity for “utilitarian” non-speculative office development and possibly for professional loft offices above retail and build-to-suit opportunities catering to the aviation business in SeaTac.
- SeaTac does not need “more of the same” in terms of retail – especially since the overall regional market is “oversupplied.” However, within SeaTac’s primary trade area, several gaps were identified in strategic categories as with home furnishings, electronics/appliances, specialty food stores, sporting goods and specialty retail, and limited service dining, perhaps with an outlet component, in a more open-air type environment – also a bowling or adult game center (like Dave and Busters) adjacent to a restaurant cluster. Total demand was estimated to be in the range of 150-250,000 square feet for a small outlet center coupled with a small grocer and restaurant cluster – augmented by free, highly visible and easily accessible parking.
- While most hotel patrons drawn to SeaTac will be value-oriented in a market already well served but with “not great” occupancies, what was viewed “clearly missing” would be a small, one-of-a-kind, boutique hotel with some ancillary meeting space.

South 200th Station Area Market Report (2012)

On behalf of Sound Transit, the commercial brokerage firm Kidder Mathews submitted a *South 200th Station Area Market Report*, dated November 7, 2012. The report was intended to evaluate opportunities for public-private development partnership at the South 200th LRT station.

While the geographic focus of this study was outside the immediate City Center area, the following observations would be potentially applicable to City Center projects as well:

- Demand for added lodging would most likely be focused on a select service or extended stay hotel of 120-150 rooms.
- Unless a large office user locates in the station area and “catalyzes the market,” there would likely be insufficient demand to support added office development over the next five years.
- The most attractive retail sites are International Boulevard corner parcels, most suitable for auto-oriented drive-up business – with perhaps some service retail to serve SeaTac area job growth.
- While not attractive for affordable (income restricted) housing, light rail is expected to improve the area’s desirability “in combination with other infrastructure investments.”
- There is moderate demand for added Park & Fly parking but with 200th not as attractive unless sites are located adjacent to the LRT station.

Sea-Tac International Airport Economic Impacts (2018)

Community Attributes, Inc. (CAI) prepared a *Sea-Tac International Airport Economic Impacts* report for the Port of Seattle in January 2018. As the 9th busiest airport in the U.S. hosting nearly 47 million passengers in 2017, SeaTac's economic impacts were identified as including:

- On-site direct employment of 19,100 jobs with wages averaging \$73,500 as of 2017.
- Statewide impact of \$22.5 billion in economic activity, 151,400 jobs and \$7.1 billion in total compensation.
- Serving 8.2 million visitors traveling to Washington state through SeaTac – supporting 68,200 jobs, \$2.2 billion in annual compensation and \$5.9 billion in total economic activity especially for lodging, food and transportation.
- City of SeaTac-specific support for an estimated 24,100 jobs, 1.7 billion in total compensation and \$6.1 billion in economic activity as of 2017.
- Also cited were Port of Seattle economic development projects in Des Moines (for a business park) and Burien (Northeast Redevelopment Area Project) – but no specific projects specifically noted within the City of SeaTac.
- Planned capital improvements expenditure of \$3.2 billion over 5 years – including the International Arrivals Facility and North Satellite Modernization Project.

Observations Summarized

From this review of prior market, business development and economic impact related studies, three observations are offered as pertinent to this 2019 urban design framework process:

- There has been reasonable consistency of viewpoints as to pivotal market opportunities for SeaTac's City Center. Airport-oriented hotel and park & fly operations have been consistently viewed as having continuing market support – although there have been varied opinions as to market segment and product types most feasibly served. Retail prospects have uniformly been viewed as less favorable due to existing south end market saturation – with the exception of some added local and airport dining, entertainment and/or service-related retail.
- There have been divergent opinions as to realistic market prospects for office, housing and mixed-use development – with prospects viewed less favorably through the Great Recession and its immediate aftermath. With continuing economic recovery, market demand now appears more favorable, though there remains uncertainty as to whether rents will support costs of development – as considered later in this memorandum with discussion of current indicators of real estate market demand.
- Perhaps most significantly, true transit-oriented mixed use, public-private development has yet to materialize in SeaTac's City Center subarea – despite the presence of the region's largest airport and a now in-place light rail transit system. This continues to represent missed economic opportunity – for the City of SeaTac and the metro region.

DEMOGRAPHIC & ECONOMIC UPDATE

With review of past work in hand, this economic opportunities report now proceeds to an updated demographic and economic review of the immediate City Center in the context of the entire City of SeaTac and a more encompassing Greater SeaTac market area. Included is consideration of market geographies, comparative demographics, housing, employment, and retail sales – followed by discussion of real estate indicators of market demand.

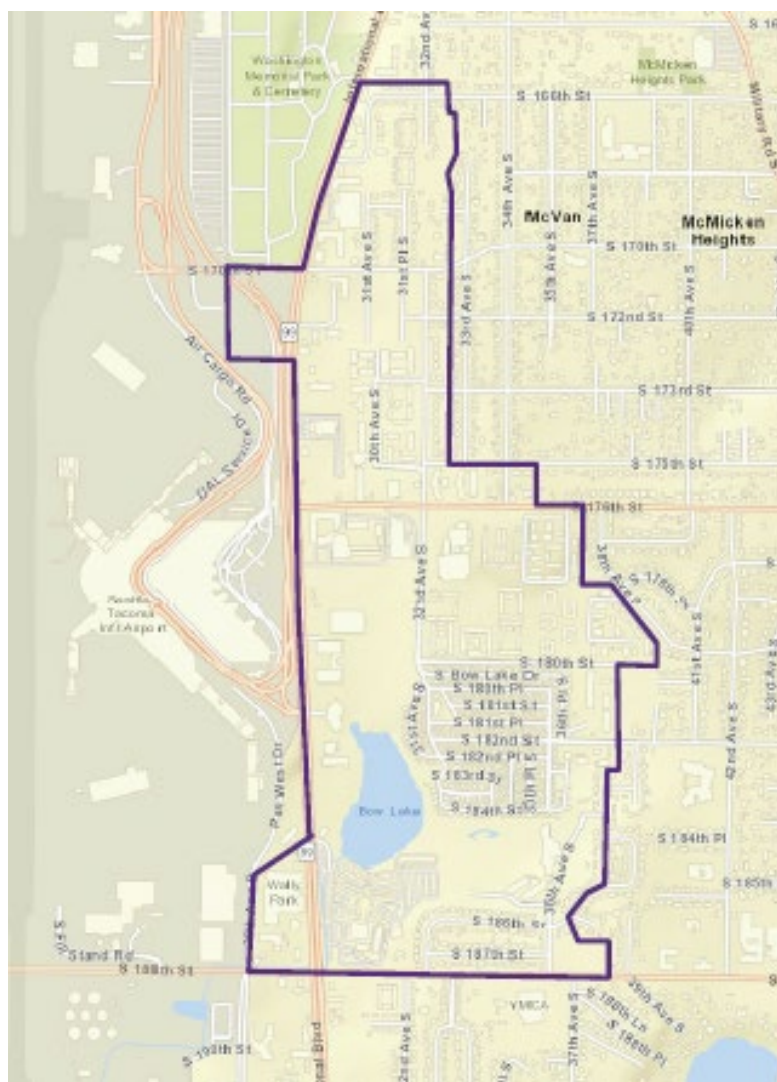
Market Geographies

For purposes of comparative analysis, three market geographies are of greatest interest:

- The **City Center** planning sub-area (shown by the map to the right), is defined as bounded by the Highway 99/ International Boulevard corridor to the west, from about S 166th Street to the north, then extending south between 32nd/33rd Avenue to S 175th, from which it runs irregularly south to a southern boundary at S 188th Street.

This 300+ acre area is situated immediately adjacent to the Sea-Tac International Airport and comprises the commercial and higher density core of the city.² As of 2019, the City Center sub-area had over 5,600 residents, accounting for about 20% of SeaTac's population city-wide.

SeaTac City Center



Source: Environics/Claritas and E. D. Hovee.

- Boundaries of the incorporated **City of SeaTac** extend just west of the Sea-Tac International Airport, north to S 128th Street, on Military Road to just south of I-405, east to the I-5 freeway, then to S 228th Street.

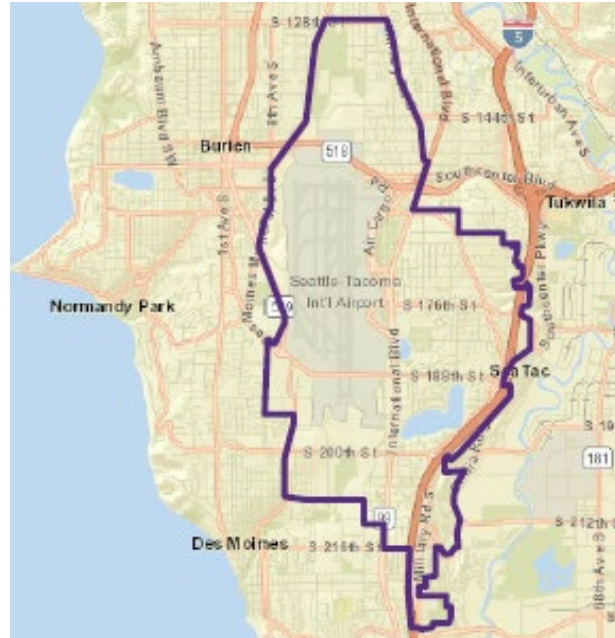
As of 2019, the Washington State Office of Financial Management (OFM) estimates the city's population to be comprised of approximately 29,180 residents.³ SeaTac's population represents close to 10% of the Greater SeaTac market area, considered next.

- The **Greater SeaTac** market area is defined consistent with what was previously identified as a secondary trade area as part of a market study prepared by Streetsense in 2010. This represents the market reach of major shopping center destinations as with Southcenter in Tukwila. This greater market area is bounded by Puget Sound on the west, extending to the Duwamish industrial area and adjoining neighborhoods to the north, going southeast along Lake Washington to Renton, south along I-405 and then SR 515 into downtown Kent and to a southern boundary of about S 277th Street. Population of this greater market area is estimated at approximately 298,500 residents as of 2019. This equates to over 13% of the 2.226 million residents of King County.

Area Demographics

For this analysis, primary reliance is given to proprietary data of Environics/Claritas with estimates as of 2019.⁴

City of SeaTac



Greater SeaTac



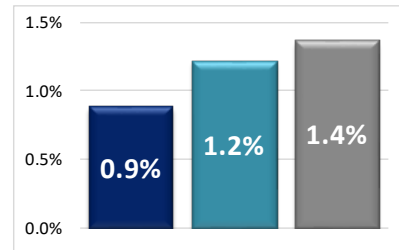
Source: Environics/Claritas and E. D. Hovee.

As illustrated by the charts to the right:

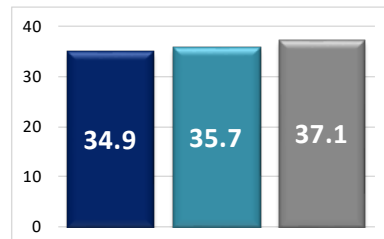
- **Population** of the SeaTac's City Center area has increased at a slower pace than for the city as a whole and the Greater SeaTac market area since 2010. City-wide growth is also below the statewide growth rate averaging 1.3% per year through this decade.
- As might be expected for a community oriented to SeaTac International Airport, **median age** for the City Center area is below that of the Greater SeaTac / South County area (which is comparable to the state). Median age has increased across all three geographies – up by the most (+ 1.9 years) for the City Center area.
- All three geographies have “majority minority” populations. As of 2019, the **minority** proportion accounts for an estimated 68% of City Center residents, with the white-only proportion at 32%. Since 2010, the minority proportion has increased for the City Center and city-wide geographies by about 8-9% points and by 6% points for the greater SeaTac market area.
- With some variation, 50%+/- of the adult population in all geographies have completed **some college or more** – with the rate lowest at 47% for City Center residents. However, only 16% of City Center residents have a bachelor's degree or better vs. 22% of all SeaTac and 28% of greater SeaTac residents.
- At just under \$40,000, **median household income** of City Center households is 66% that of all households city-wide and 61% of households throughout the greater SeaTac area. All three geographies are well below a statewide median income estimated at \$73,800 as of 2019. Only 20% of City Center households have incomes of \$75,000+ per year as compared with 40% of all SeaTac households and 43% of all households in the greater SeaTac market area.

Area Demographics (2019)

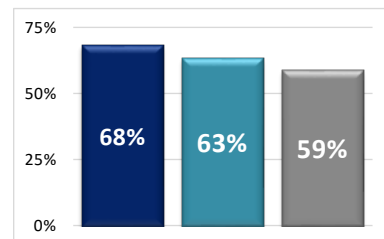
% Population Growth/Yr (2010-19)



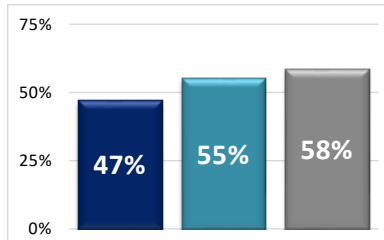
Median Age of Population



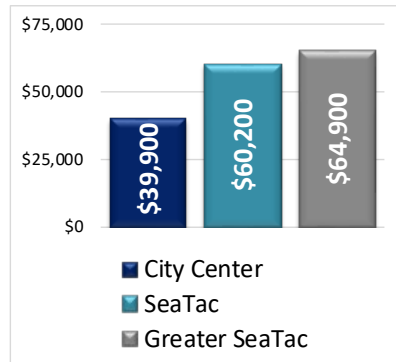
% Minority Population



% Some College & More (age 25+)



Median Household Income



Source: U.S. Census and Environics.

For the City Center area, poverty rates are somewhat above those of the comparison geographies – at 14-15% of all families as compared with 11% of SeaTac and 12% of greater market area families.

Other demographic characteristics of note for this market study report include the following:

- Of six **single- and multi-race categories** (other than white-only), the City Center and entire SeaTac have higher proportions than is the case for the greater SeaTac market area – with the exception of Asian-alone residents and persons who identify as being of two or more races.
- Due in part to smaller household size, the typical household in the City Center area has less than 1.5 **autos per household**, as compared with ratios of 1.9 and 1.8 for the entire city and greater market area, respectively. However, the proportion of City Center residents with no vehicle is only 11%, just 2-3 percentage points above the “no vehicle” rates for the other two comparison geographies.
- About 55% of City Center residents **drive alone** to work, a lower rate than the 67% proportions indicated for the other two geographies. However, average commute time is greater for City Center workers – at 37 versus 33-34 minutes.
- While a somewhat higher 16% proportion of the City Center work commute by public transit than the 13-14% ridership rates city-wide and for the greater market area, the more noticeable difference is found with those who **walk to work** – at 15% of workers living in the City Center area versus 2-5% for those of the greater market area and city of SeaTac, respectively. This indicates opportunity to improve the City Center pedestrian environment as an important element of the urban design framework process.
- At 62% of all persons age 16+, **labor force participation** for City Center residents is below the 66-67% participation rates of the entire city and greater market area. A higher proportion of City Center workers are employed in blue collar or service occupations than is the case for the other two geographies.
- Certain **occupations** also are somewhat more highly associated with City Center area residents – including transportation/material handling, sales related, building/grounds maintenance, office/administrative, personal care service, construction, management, production, protective services and food preparation. Taken together, these occupations account for 86% of persons living in the City Center area – compared with 77% city-wide and 72% for the greater SeaTac area.

Housing

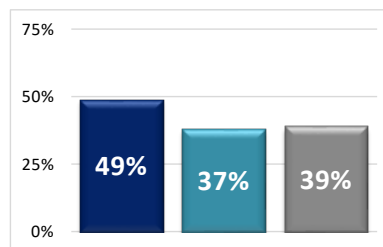
When it comes to housing, the differences between residents of the City Center area and the other two comparison geographies are more pronounced. As with demographic information, comparisons are with the entire population of SeaTac and the greater SeaTac market area extending north into south Seattle, east to Renton, and south to Kent and Des Moines. City Center residents clearly are accustomed to a more urban lifestyle than their counterparts who live elsewhere in the greater SeaTac community.

As illustrated by the graphs to the right:

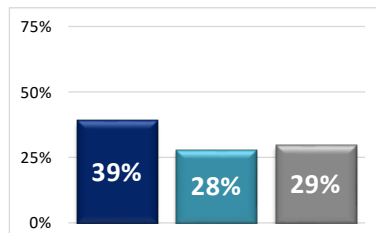
- Nearly half of all City Center households are accounted for by **non-family households**, above the 37% and 39% proportions for the all SeaTac and greater market area households, respectively. Households with no residents under age 18 represent 67-72% of all households across the three geographies considered with this analysis.
- Not surprisingly, the proportion of housing units comprised of **1-person households** is also above average – though by not as large a proportion as for non-family households. This suggests that a large portion of non-family households are doubling up, as with room-mates or other shared living options.
- For the City Center area, nearly two-thirds (66%) of occupied housing units are **rented**, as compared to less than half for the other two geographies. As an added point of comparison, renters account for about 37% of occupied housing statewide.
- **Multi-family units** also account for 66% of all City Center housing – as compared with 42% of housing units for the entire city and greater market areas. Within the City Center area, just under one-quarter of multi-family units are in complexes of 50+ units with 66% in projects of 5-49 units and 9% in plexes.
- While only one-third 30% of the City Center housing in-use inventory is owner-occupied, housing values for all homes (whether or not on the market) are relatively modestly valued at a **median value** of \$255,000. For at least some of these homes – especially where there is zoned potential for more intense redevelopment in the future – property value may be more in the land than the structure. City-wide, home values appear to be about 13% below the greater market area median.

Comparative Housing (2019)

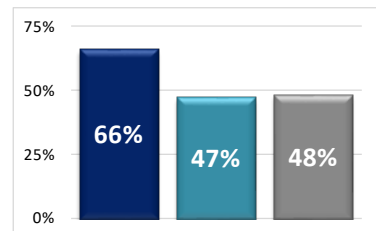
% Non-Family Households



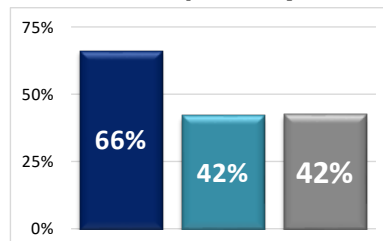
% of 1-Person Households



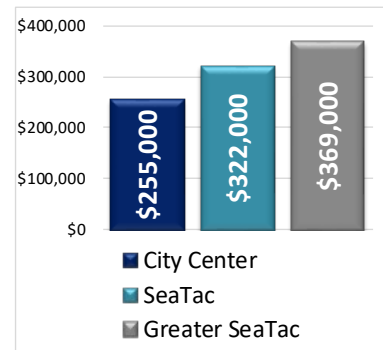
% Renters



% Multi-Family Units (2+ Units)



Median Value Owner Housing



Source: U.S. Census and EnviroNics.

One other factor is of note with this analysis -- the relatively **greater age** of the City Center's housing inventory. Only 13% of housing in the City Center area has been constructed from 2000 to present – as compared to 20-21% both city-wide and for the greater market area. Available City data indicates no City Center multi-family projects have been constructed since 2007.⁵

Taken together, the housing data describe a City Center market that is more urban than all of SeaTac or the greater SeaTac market area – likely with growing divergence in the years ahead.

Employment

Two sources of information regarding employment are available for the entire City of SeaTac – PSRC and the U.S. Census. Each source has its own advantages and limitations as described in this memorandum. Taken together, the sources are useful to provide a composite albeit somewhat incomplete understanding of City Center employment vis-à-vis the entire City and greater market area.

PSRC Data. PSRC provides covered employment data on a city- as well as region-wide level. While PSRC data is not readily available on a sub-city basis or for the customized greater market area, it is most useful in understanding city-wide employment trends in recent years. For this analysis, comparative data is provided for 2015 and 2018, as shown by the following chart.

PSRC data indicates that SeaTac had a total count of about 34,140 jobs as of 2018. This represents a substantial increase of 4,220 jobs from 2015-18 (a gain of 14%).

WTU (which includes wholesale and transportation activities) accounts for over 18,800 in-city jobs as of 2018, approximately 55% of SeaTac's total employment. This sector also accounts for close to 80% of the net job growth experienced city-wide from 2015-18.

Most of this WTU employment activity is centered at and adjoining the airport – primarily west of International Boulevard and the City Center area.

SeaTac Employment (2015, 2018)

Job Sector	2015	2018	# Chg 2015-18
Const/Res	327	582	255
FIRE	929	1,132	203
Mfg	892	471	(421)
Retail	692	695	3
Services	8,181	8,644	463
WTU	15,472	18,823	3,351
Govt	2,785	3,159	374
Educ	638	629	(9)
Total	29,916	34,136	4,220

Source: PSRC.

City Center employment benefits indirectly from spin-off business generated by airport operations and on-site businesses. City Center business sectors benefited include lodging, dining, and parking activity – together with office employment and some convenience retail. Of particular note is improved occupancy recently indicated for City Center office towers situated immediately east of the airport – attributable in part to airport related business activity.

U.S. Census Data. City-wide employment information as available from PSRC can be further augmented by relatively new data tools available from the U. S. Census Bureau. The Census Bureau now provides an interactive mapping tool called *On-the-Map*, making sub-county data for customized geographies available.

For this analysis, the most recent available jobs data is compared for the greater City Center area vis-à-vis the entire city and greater SeaTac market area. As with PSRC information, employment data from this source is by *place of work*, rather than place of residence.

As of 2015 (the most recent year for which complete Census data has been available to cover all three geographies), comparative job counts are summarized as follows:

- **City Center** – over 3,900 jobs from businesses and other organizations located within this subarea.
- **SeaTac** – home to 27,400 jobs city-wide (the majority of which are associated with the Sea-Tac International Airport). This job count is about 8% less than the PSRC employment estimate as of 2015.⁶
- **Greater SeaTac** – with an employment base estimated at 223,900 jobs.

Whether considered in terms of PSRC or Census data, SeaTac can be considered as *job-rich* relative to population. Based on Census data, SeaTac accounted for about 10% of the population versus at least 12% of the employment base of the greater market area – as of 2015.

Per census data, close to 60% of employment in the city is accounted for by just one industry – transportation (with associated warehousing). Employment increased by 20% overall from 2010-15, well above the 12% employment increase noted for the greater SeaTac market area.

Virtually all of SeaTac's net job gain from 2010-15 is accounted for by an increase in the number of in-city transportation-related jobs. *Note:* PSRC data indicates that transportation-related jobs account for on a slightly lesser 80% of net job growth experienced city-wide in the next three years of 2015-18.

The City Center area presents just the opposite picture as relatively *jobs-poor* – accounting for 19% of SeaTac's population but only 14% of its reported job base (as of 2015). Close to half of SeaTac employment is accounted for by hospitality businesses (i.e., accommodation and food services).

Census data also indicates that City Center employment declined from 2010-15. However, all of City Center this decline has been attributed to transportation-related employment which was increasing city-wide. This may be due to reassignment of jobs from the City Center area to another part of the city.

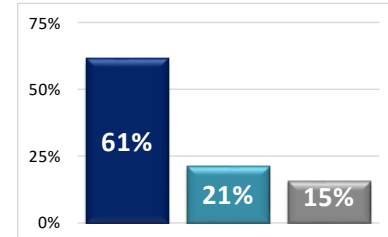
Additional Census-based *place of work*-related jobs data are as illustrated by the graphs to the right:

- City Center’s job base is clustered around two disparate but **strong sectors** – accommodation/food services (47% of area jobs) plus management/administrative jobs (for an added 14%). By comparison, these sectors account for only 21% of jobs city-wide and 15% of total employment for the greater market area.
- However, **job growth** of the sectors that have had a comparative edge in the City Center has lagged behind employment gains for the greater SeaTac market area. City Center jobs in accommodations/food service increased by only 10% from 2010-15 vs. 23% for the greater market area; however, office jobs increased.⁷
- Due largely to the lower **wage profile** of the accommodations/food services sector, the proportion of City Center workers earning more than \$3,333 per month (or \$40,000 per year as of 2015) is considerably below that of employees working city-wide or throughout the greater SeaTac market area.⁸
- **Age of workers** in the City Center does not vary appreciably from that of the two comparison geographies. The City Center has a somewhat lower proportion of employees age 55 and over with slightly larger proportions of its labor force among younger working age cohorts.
- Similarly, there are some albeit not substantial differences in the **educational levels** of workers age 30 and over. Across all geographies somewhere in the vicinity of 59-65% of workers have some college training – with or without a degree. About 29% of City Center workers have a bachelor’s degree or better. This increases to 30% for workers city-wide and to 31% of persons employed throughout the greater SeaTac market area.

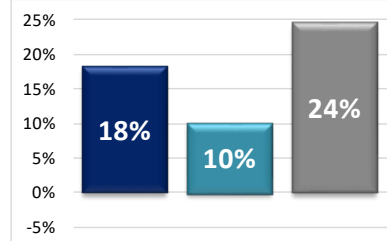
As illustrated, the greatest difference between the City Center area and the two comparison geographies are in

Comparative Job Mix (2015)

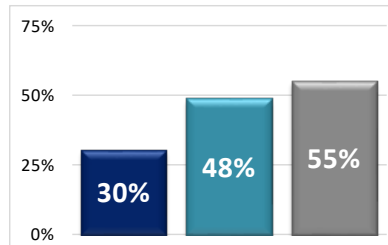
% All Jobs – Strong CC Sectors



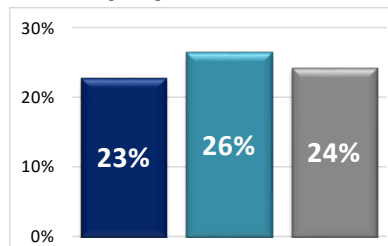
% Growth – Strong CC (2010-15)



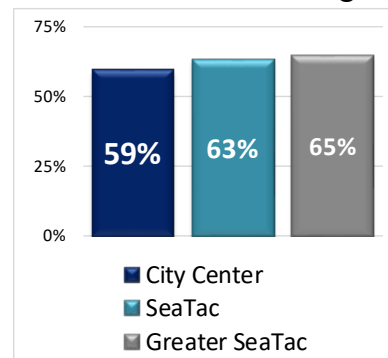
% Workers Earning \$3,333+/Mo



% Employees 55+ Yrs Old



% Workers w/Some College (30+)



Source: U.S. Census *On-The-Map*.

the industry mix of the job base and wage levels. Two added notes are of importance in understanding the employment profile of workers in the City Center as compared with the entire city and greater market area

- First, the City Center is **more diverse** when viewed by race. About 40% of City Center workers are persons of color – well above the 31% and 25% proportions city-wide and for the greater market area. There is little difference in the 8-10% of the workforce that is Hispanic or Latino across all three geographies – a difference in ethnicity, not necessarily in race.
- Second, two of three geographies have a workforce with a **higher proportion of men** than women workers – with City Center being the exception. About 54% of city-wide workers and 57% of greater market workers are male versus 46-47% for the City Center.

Retail Sales

Retail sales analysis for SeaTac is complicated by the fact that the City Center and the entire city represent only a small portion of the **retail supply** that serves local residents and workers. Most notably, the regional Westfield Southcenter Mall is located only 3-4 miles from the City Center area – serving much of the local and greater market area need, especially for comparison goods and services purchased on the basis of price and selection.

From a **demand perspective**, the retail evaluation is further complicated by the presence of an international airport and associated lodging that generate much of the City Center's retail sales – especially for food and beverage sales. On a city-wide level, it is not directly possible to distinguish the portion of retail sales generated by local resident or worker patronage from sales made to persons visiting SeaTac going to or coming from an air travel destination.

However, with these caveats in mind, it is possible to provide some general observations about the character and depth of the retail market for the City Center area and entire City in the context of a greater SeaTac market area – based on Environics/Claritas data as most readily available. This analysis starts with greater SeaTac trade area, then drills down to assess the City Center's role within the greater market and the SeaTac residential community.

Current & Future Retail Greater SeaTac Demand. As of 2019, the greater SeaTac market area with nearly 300,000 residents generates **retail demand** (or spending) of an estimated \$4.20 billion per year. For purposes of this analysis, this figure excludes internet and gasoline station retail – neither of which necessarily require any significant bricks-and-mortar presence. Environics/Claritas estimates that internet sales likely equate to about 14% of the retail expenditures by trade area residents.

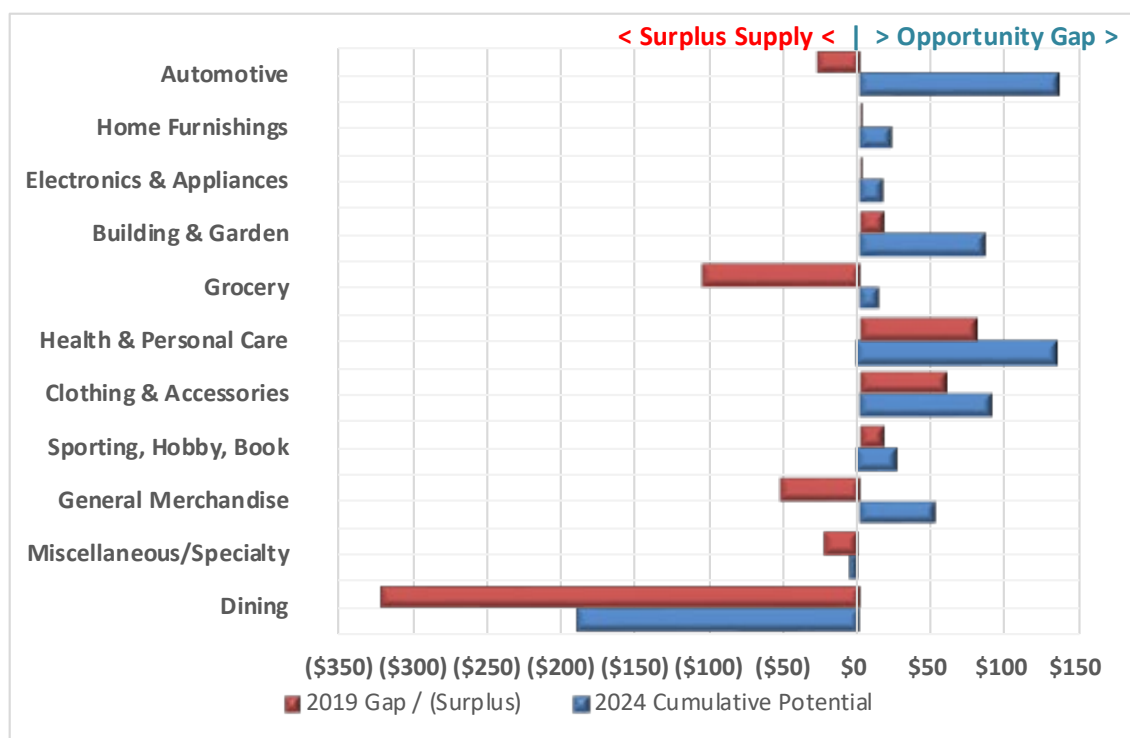
Retail sales actually experienced from stores and restaurants in this trade area are in the range of \$4.55 billion – meaning that actual sales exceed resident generated demand by \$355 million. This is not surprising as the combined effect of the airport and Southcenter is to draw in expenditures from persons who live outside the greater SeaTac market area.

Looking ahead, retail demand can be expected to increase in response to population growth, though some of this growth may be tempered by reduced purchases of an aging population coupled with greater market capture from internet retailers as with Amazon. Environics/Claritas projects that non-internet/non-gas retail demand within the greater trade area will increase by an estimated \$735 million per year by 2024.

Unmet Demand. While the needs of the greater SeaTac market area appear to well taken care of on an overall sales basis, there are specific categories of retail demand that are not fully met within the trade area. As illustrated by the following graph, there is considerable variation between retail sectors in terms of relative retail market capture.

The graph below shows the current (2019) opportunity gap (or surplus supply) in **red** and the total potential in the years immediately ahead (with added demand growth to 2024) in **blue**.

Greater SeaTac Trade Area Retail Sales Opportunity Gap / (Surplus) - \$ Millions



Source: Environics/Claritas as compiled by E. D. Hovee

Retail Well-Served. As depicted by the graph, automotive, grocery, general merchandise (department and discount store), miscellaneous/specialty and dining establishments experience greater sales volume than what greater SeaTac residents alone would support. The extent of oversupply due to non-local market capture is greatest for dining for which sales exceed locally trade area demand by more than \$320 million per year.⁹

Opportunity Gaps. Despite the overall strength of the greater trade area's retail activity, there are several retail categories for which some level of sales leakage is noted. The categories

for which resident demand is currently most undersupplied appear to be for apparel and health and personal care (including pharmacy) retail – with annual net sales leakage in the range of \$54 million and \$79 million, respectively.

Lesser levels of sales leakage are noted for building and garden and sporting/hobby/book retailing. And for two categories – home furnishings and electronics/appliances – locally generated demand appears to be roughly in balance with resident generated demand.

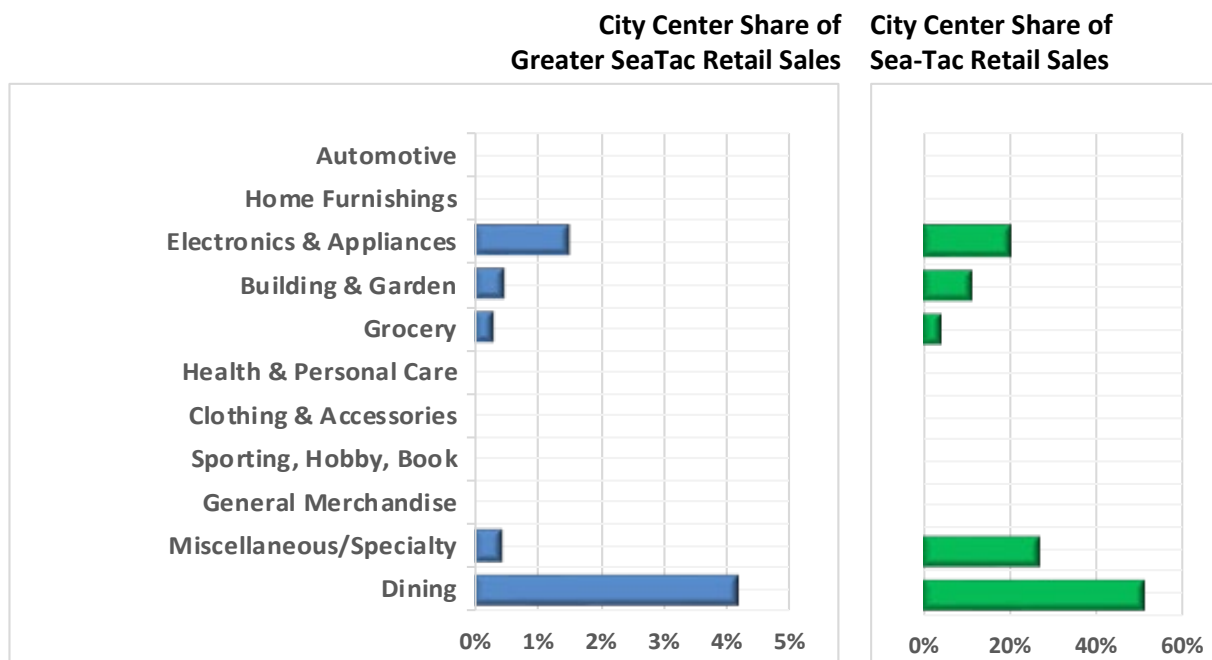
Future Opportunity with Market Growth. Retail opportunities look stronger when future trade area growth is taken into account. Projected is that categories including automotive, grocery, and general merchandise flip from oversupply to net sales leakage in the next five years – unless retail capacity within the greater SeaTac trade area is added with new projects.

For dining, oversupply is reduced. However, if visitor spending for dining remains strong, this market growth should create new opportunities for added dining as well (in the net range of over \$130 million of added local consumer generated revenue potential by 2024).

City Center & SeaTac Market Shares. Focusing on the City Center subarea:

- Overall City Center capture of the regional market is relatively small – peaking at a 4% share of greater SeaTac market area sales for dining, followed by electronics/appliances.
- When considered as a share of city-wide retail volumes, the City Center’s market shares are more impressive – at 51% of dining and 27% of city-wide specialty store volumes.

City Center Capture of Greater Trade Area & Local Retail Sales (2019)



Source: Environics/Claritas and E. D. Hovee.

Categories for which the City Center area has virtually no market presence include automotive, home furnishings, health/personal care, apparel, specialty and general merchandise retail.

Factors Affecting Future Commercial Retail Opportunity. For purposes of discussion, the following factors are identified as affecting commercial retail opportunity for the greater SeaTac market and City Center, respectively:

Global/Regional Factors:

- **Demographics** – population and income growth generally work to increase retail demand, although potentially offset by an aging population; however this is less of a factor for SeaTac with a built-in younger demographic than for Washington state. To the extent that this younger demographic can be more effectively served, there is added retail upside potential for SeaTac in the years ahead.
- **Greater SeaTac Market Area Opportunity Gaps** – with few current readily apparent underserved retail store types, except possibly for health/personal care and apparel.
- **Internet Retail Competition** – best exemplified by the continued penetration of Amazon and other internet-focused firms into traditional retail strongholds ranging from books to grocery, as well as continued consolidation of other retailer businesses in categories as diverse as apparel and pharmacy/health care.
- **Critical Mass** – a challenge in smaller communities of less than 100,000 population which are often inadequate to support the business models of some national or regional retail chains. This is particularly challenging for retailers with an established market presence just a handful of miles away – although this may change as more chains have incentive to downsize some of their traditional large format floorplate expectations.

City Center & SeaTac Specific Factors:

- **Building on Existing Strengths** – most important for SeaTac’s existing dining and lodging infrastructure, especially to the extent that the product offerings and accessibility can be upgraded and diversified to meet a broader range of visitor and traveler interests.
- **Complementary Destination Hospitality & Local Retail** – encouraging businesses that cater both to local and visitor markets as should be possible with dining and entertainment options as well as with some convenience services – such as specialty grocery and pharmacy readily accessible to short-stay travelers, residents and workers.
- **Exploring Sites Accessible to both Visitors & Locals** – not necessarily on but close to the International Boulevard corridor, offering immediate north/south and east/west access to the airport, hotels, office complexes, and SeaTac area places of residence.
- **Incenting Pedestrian Scale & Transit-Oriented Mixed Use** – with greater emphasis on residential development serving area employees (short- and longer-stay) and continued transition to structured park-fly buildings, opening sites for mixed use environments with multiple lodging, residential, retail/entertainment, and high profile office options.

Current Indicators of Real Estate Market Demand

Looking beyond demographic and economic indicators, it is useful to also review what is happening *on the ground* regionally and locally – especially over the last 1-2 years to mid-2019:

- As of the 2nd quarter of this year, the region's **multi-family housing** market “continues to ride a wave of demand that is being buoyed by corporate office expansions, record prices for land development deals and robust investor interest for a wide spectrum of CRE (commercial real estate) assets.”¹⁰ In addition to these economic factors, other market drivers include reduced affordability of home ownership and lifestyle decisions by millennials to remain in urban settings longer, both delaying and reducing family formation. At 4.9% as of Q2, metro-wide vacancy rates continue to decline from the 5.1% vacancy rate experienced in 2018. Average rents are up by more than 3.5% on an annualized basis. While new construction has slowed somewhat region-wide in 2019, net demand (or absorption) continues strong. The largest new projects continue to be focused on close-in Seattle, followed by the Eastside.
- While the Puget Sound region still outperforms the nation with lower **retail** vacancy and better rent growth, the demand (or absorption) of space has slowed in the last year. The retail investment market continues to be targeted for core Class A quality product with low capitalization (cap) rates. However, malls are increasingly challenged by retail closures affecting both department store and smaller infill tenant spaces – often requiring repositioning for non-traditional uses (as is now occurring with redevelopment of Northgate Mall for mixed-use commercial/residential and an NHL training center).
- **Office space** demand is strong with 1.7+ million square feet absorbed in the first half of 2019 – with the bulk of new leases occurring in downtown Seattle and Eastside. Amazon, Apple and Drop Box together account for 1.45 million square feet of lease transactions. Tacoma is experiencing negative absorption with outflow of tenants but with the south end up by close to 255,000 square feet year to date – though not currently in SeaTac/Burien. Southend vacancies are in the 20-30% range for Renton/Tukwila and Federal Way/Auburn – strongest at less than 6% in the Kent Valley. A major factor affecting Renton/Tukwila vacancy is construction of the 486,000+ square foot Southport Office Campus – with no tenants landed as of mid-year 2019.
- After several years of strong economic growth and new development, regional **lodging** occupancies now appear to be softening somewhat (down by 1% point in the last year). Declining occupancies and reduced revenue per available room (RevPAR) are noted for Seattle (Downtown and North) properties – while other submarkets remain positive. Six new hotels opened in the first half of 2019 plus a new SeaTac Hilton Garden Inn. Room rates continue to increase, though more slowly than in recent years. If the economy stalls out or moves toward recession, lodging occupancies could be more adversely affected short-term, though the long-term outlook regionally remains strongly positive.

Increasingly, the real estate development and brokerage community has come to identify regional sub-markets less by political boundaries and more by submarkets distinctive to each

real estate product type. The local and greater market geographies described below follow the conventions currently being applied by firms active with each product type, briefly summarized as follows:

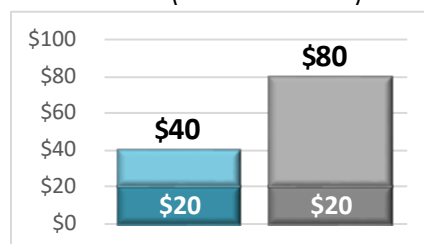
- At \$1.80 per square foot per month, SeaTac **apartment rents** are 40% below Seattle-wide rents (for an area extending from Mountlake Terrace south to Des Moines). However, over the past year, SeaTac rents have increased by about 10%, above the 3% average rent increase areawide. At 810+ square feet, average unit size is also 16% more than the less than 700 square foot average size for the greater Seattle area.
- **Retail rents** increasingly are categorized more by generalized urban versus suburban locations. While Seattle CBD rents can reach up to \$80 per square foot with mixed use rates at up to \$50, suburban rents are in the \$20-\$40 range with southside properties at the lower end of this range. South King County vacancies average 4.1%, double Seattle vacancies and 25% above the region-wide vacancy figure of 3.3%.
- As of Q2 2019, **office market rents** for SeaTac-Burien average just under \$29 per square foot, 26% below the Puget Sound average of \$39. Vacancies are double the regional average and absorption year-to-date has been slow; however 130,000 square feet is under construction.¹¹
- The commercial brokerage firm Kidder Matthews identifies seven discrete Seattle-Tacoma lodging submarkets including two in SeaTac – defined separately as midscale and upscale. **Hotel room rates** now average \$105 for SeaTac midscale and \$155 for upscale properties – though both are below the regional wide room rate averaging \$175. SeaTac upscale properties experience 77% occupancy – above the midscale figure of 73% and the region-wide average of just under 76%. One SeaTac hotel (Comfort Inn) has sold this year and a Hilton Garden Inn opened in March 2019. SeaTac’s revenue per available room (RevPAR) also is increasing more rapidly than for the region.

Per Square Foot Rents (2019)

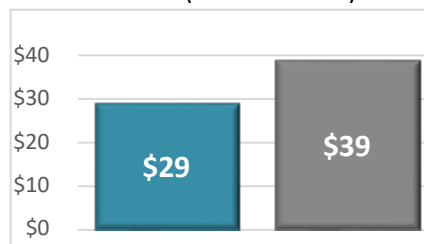
Apartments (monthly)



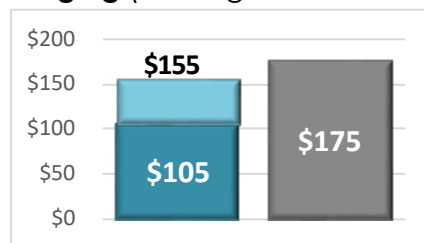
Retail (Annual NNN)



Office (Full Service)



Lodging (Average Room Rate)



Local Market

Note: Definitions of local and greater market areas vary depending on the source, as described in accompanying text.

Sources: Rent *Café*, Kidder Mathews, Colliers, Newmark Knight Frank, CBRE, as of 1st-2nd quarter 2019.

FRAMING OPPORTUNITIES

When viewed in terms of current rental characteristics (including lodging rates), it is clear that SeaTac consistently underperforms the greater market across apartment, retail, office, and hotel product types. There may be multiple reasons for these disparities – including increased cost of International Boulevard land (driven by parking operations), older than average real estate product, construction cost escalation, geographic separation posed by the airport to potential market area immediately west of International Boulevard, and/or competition from nearby commercial uses outside SeaTac. In any event, these and other market factors make it difficult for new construction to demonstrate project feasibility.

For SeaTac's City Center, **mixed use** may include residential above commercial but also other formats including mixes of retail, office, conferencing, hotel, and extended stay concepts with structured parking. The SeaTac market has been and can be expected to remain airport-driven – with as yet untapped potential as a globally significant airport city.

Project feasibility for new construction increasingly will require a shift toward urban mixed-use development concepts – attracting rents closer to (or even above) market averages. As an airport-driven market, there remains an untapped dynamic for SeaTac to be repositioned as a west coast or globally recognized *airport city*.

Among urban centers in the Puget Sound region, SeaTac is presented with a unique set of market opportunities predicated on *network effects* – as a real estate product or service that can yield greater value with customer use and cross-shopping. As airport usage increases, there is correspondingly greater demand for airport support services – notably lodging, extended stay residential, parking, dining, entertainment, supportive business services, and convenience-oriented services.

This cumulative value is best captured when seemingly disparate real estate products and customers are linked (or networked) – making it ever easier for airport users, employees, and residents to each layer in their share of spending potential and market capture. An *aerotropolis* (or airport city) concept is one where each new development provides added incentive not just to pass through – but linger. Provide office space, conferencing, traditional and flexible lodging, and dining/entertainment with SeaTac as the complete one-stop package deal.

This approach requires investors and developers willing to step out beyond the tried and tested. This is best facilitated by a common vision or sense of purpose between the City and business community – including discussion of appropriate land use policies, incentives and infrastructure investment.

Whether and how this might be applicable for SeaTac can be further explored in subsequent project work tasks involving preparation of a vision statement and urban design concept based on community and stakeholder input including the City Center charrette process.

To summarize, pivotal market-responsive economic development opportunities ahead include:

- Improved linkages with the airport – specifically airport services including lodging, extended stay, convenience retail/dining and park & fly.
- Expanded office employment for businesses with global footprint and as an emerging southside Class A office cluster.
- Preparation for potential reduction in future parking demand with changes in vehicle technology and consumer preferences – eventually freeing up City Center land for other airport and community driven transit-oriented and mixed-use development concepts.
- Short-term opportunity for more intensive residential and neighborhood commercial uses within the portion of the City Center area situated away from International Boulevard.

NEXT STEPS

This economic opportunities review will be refined in response to charrette discussion and refinement of a design framework going forward. An added next step will be to identify and validate realistic site development opportunities.

ENDNOTES

- ¹ Information for this market and economic impact report has been obtained from sources generally deemed to be reliable. However, E. D. Hovee does not guarantee the accuracy of information from third party sources and information is subject to change without notice. Observations and findings contained in this report are those of the author and should not be construed as representing the opinion of any other party prior to their express approval, whether in whole or part.
- ² Preliminary GIS data files for the City Center indicate that tax lots within the subarea comprise a total of just over 304 acres. This excludes non-parcelized land such as street rights-of-way.
- ³ Environics/Claritas estimates SeaTac's population as of 2019 to be 29,990, nearly 3% above the OFM estimate.
- ⁴ Environics data is customized to the geographies indicated and benchmarked to U.S. decennial and more frequently generated American Community Survey (ACS) data.
- ⁵ The current GIS database does not provide date of construction for all City Center taxlots with structures.
- ⁶ While the reasons for the difference between city-wide employment estimates of PSRC and the U.S. Census Bureau are not clear, one possible reason lies with allocation of employment by jurisdiction. This is often the case for airport related activities where the number of persons paid from a SeaTac location may not be the same as those actually working on-site in SeaTac.
- ⁷ An example of the resurgence in office demand is provided by the signature twin 12-story towers and a 4-story office building totaling 550,000 square feet with the SeaTac Office Center. In recent years, more than \$10 million reportedly has been spent in upgrading the complex with "new amenities modern and up-to-date cosmetic materials, updating and adding conference rooms, upgrading and expanding the fitness center, upgrading building systems, and making exterior improvements."

Building occupancy has increased from 62% in late 2015 to more than 90% as of July 2019. Key tenants include Alaska Airlines, Lynden, TSA, the Port of Seattle and 13 Coins. The south end remains the region's poorest performing submarket with vacancy rates of 22% as of 2019 Q2, but better for SeaTac/Burien at 14.4%. Average asking rent in the south end is \$33 per square foot per year as compared with \$48 in Seattle's CBD and close to \$52 in downtown Bellevue, per brokerage firm Newmark Knight Frank (NKF).

Advantages cited for this SeaTac office location include proximity to the airport and light rail together with low rents and ample on-site parking. Based on information from Urban Renaissance Group press release of July 26, 2019 and *Puget Sound Business Journal* titled: "Urban Renaissance Group has new partner on SeaTac office towers," July 29, 2019.
- ⁸ The average wage of airport employees is noted at \$73,500 (as of 2017), as reported by a 2018 Port of Seattle Airport Economic Impact Study. This is considerably higher than the wage profile indicated for the employees at establishments located in the City Center area.
- ⁹ Greater SeaTac retail (across multiple jurisdictions) is intended to include dining and other on-site retail activity at the Sea-Tac International Airport. As of 2019, total retail (including dining) sales for the Greater SeaTac market area total \$16.0 billion. Of this amount, about \$1.0 billion is attributable to sales within SeaTac (including retail volume at the airport). Retail sales within the City Center portion of SeaTac are estimated at \$154 million.
- ¹⁰ Dennis Kaiser, "Seattle Multifamily Market Soars to New Heights," *Connect Seattle Commercial Real Estate News*, August 15, 2019.
- ¹¹ CBRE provides office data specific to SeaTac – indicating office vacancy of 6.7% as of the 2nd quarter 2019, average rent rate of \$27.79 for Class A space, and net absorption of 60,000 square foot in the past year. Expansion of the Alaska Air headquarters represents a significant owner-user build-to-suit project.

APPENDIX B: INFRASTRUCTURE OPPORTUNITIES ASSESSMENT

- SeaTac City Center Area Transportation and Utility Infrastructure Analysis
Needs Assessment and Opportunities (Toole Design)

SeaTac City Center Area

- Transportation and Utility Infrastructure Analysis: Needs Assessment and Opportunities



Transportation Infrastructure Analysis

Process:

- Reviewed adopted transportation, utility, and general community plans and policy statements (including but not limited to, the Comprehensive Plan and the Transportation Master Plan)
- Identified existing demand generators and limitations in the transportation system's functionality within the City Center Plan area
- Highlighted possible limitations in, and opportunities for the transportation system's functionality *in the future*

Transportation Infrastructure Analysis

Focus areas:

- Transportation demand generators: employment and residential centers, and key destinations
- Threats to the transportation system's functionality: turn restrictions, mega block developments, congested corridors, and lack of multi-modal facilities

Purpose:

- Develop understanding of the transportation network's functionality and future growth opportunities and challenges

Transportation Infrastructure Key Takeaways: Major Themes

- **Gap between Policies & Implementation:** Policies from adopted plans do not match current space allocations and infrastructure for pedestrians, bicyclists, and transit riders within the Right of Way which indicates current City goals have not yet been implemented through public investment or private development
- **Existing Barriers:** The existing disconnected and restricted transportation system within the City Center Area limits the flow of motor vehicle traffic and creates barriers to vehicle and pedestrian connections in the area, and potentially barriers to redevelopment
- **Future Opportunities:** Redevelopment opportunities should consider access to and from the parcels, circulation within developments to manage growing congestion, and improvements to vehicle and pedestrian connections throughout the City Center Area

Transportation Infrastructure Key Takeaways: Existing Network Highlights

Gap between Policies & Implementation:

- A **well-connected network** for motor vehicle and pedestrian traffic in the City Center Area, and **residential areas** served by **public transit** and a **network of sidewalks**
- **Comfortable, regular crossings** and **access points at convenient intervals** for motor vehicles and pedestrian traffic within the Area

Existing Barriers:

- **Congested and irregular motor vehicle connections** due to: frequent turn restrictions along International Blvd. and limited driveway entrance options into larger scale parcels, regular congestion at intersections, and a lack of internal circulation on larger parcels, and connections between developments
- **Restricted and uncomfortable pedestrian connections** due to: wide, auto-oriented intersections; limited crosswalks between bus stops, and a lack of internal circulation on larger parcels, and sidewalk / pathway connections between developments

Future Opportunities:

- **Megablocks** impede connectivity, add pressure to the existing limited network, and limit the access to existing and future redevelopment opportunities
- **Site access and internal circulation limitations** restrict access to and through the sites for all modes (e.g. loading, visitors, and neighborhood connections), and encourage growing congestion on the few East-West routes in the Area

Gap between Policies and Implementation: Policy Highlights

Documents reviewed:

- City of SeaTac 2017 Comprehensive Plan
- City of SeaTac 2015 Transportation Master Plan
- Puget Sound Regional Council 2013 Growing Transit Communities Compact
- City of SeaTac 1999 City Center Plan

Focus areas:

- Transportation, Community Design, Utilities, and Land Use elements

Purpose:

- Identify gaps between the City's adopted policies and existing conditions within the City Center area

Gap between Policies and Implementation:

Comprehensive Plan Takeaways

The City Center Area's existing transportation network conditions do not currently reflect the Comprehensive Plan's policies. For example, the Comprehensive Plan's policies support:

- A **well-connected network** for motor vehicle and pedestrian traffic in the City Center Area, and **residential areas** served by **public transit** and a **network of sidewalks**.
- **Comfortable, regular crossings** and **access points at convenient intervals** for motor vehicles and pedestrian traffic within the Area.

Policies in the Comprehensive Plan include best practices that support recommended and allowed land uses in the Area, and can be used to guide the City Center Area Plan's discussions and planning efforts.

Gap between Policies and Implementation: Comprehensive Plan Examples



■ Transportation Element

- 4.1: For the benefit of SeaTac's residents, businesses, and visitors, promote the safe and efficient transport of people and goods by implementing and maintaining an integrated multi-modal transportation system that also supports and encourages alternative and active transportation modes.
- 4.4D: Serve the City's residential areas with transit and well-connected networks of sidewalks and bicycle paths.
- 4.5B: Work with King County Metro to enhance transit service in SeaTac, especially east-west connections to the Urban Center and to connections with BRT routes.

■ Community Design Element

- 7.2I: Provide safe methods such as signalized crossings...for people to cross major streets at regular and convenient intervals.
- 7.2J: Encourage pedestrian and bicycle connections through large blocks.

■ Utilities Element

- 6.1B: Coordinate with utilities on provision of basic service.
- 6.1C: Require new development to connect to sanitary sewer.

■ Land Use Element

- 2.1A: ...focus the majority of SeaTac's commercial and residential growth and redevelopment into three distinct complete communities within designated Urban Center.
- 2.1C: Promote development that reduces block sizes in the Urban Center...and provides a network of connected local streets to facilitate pedestrian circulation and transit accessibility.



Existing photos of motor vehicle access barriers



International Blvd. at S. 188th St.



International Blvd. at S. 170th St.



International Blvd. at S. 176th St.



International Blvd. at S. 180th St.



S. 180th St. looking north

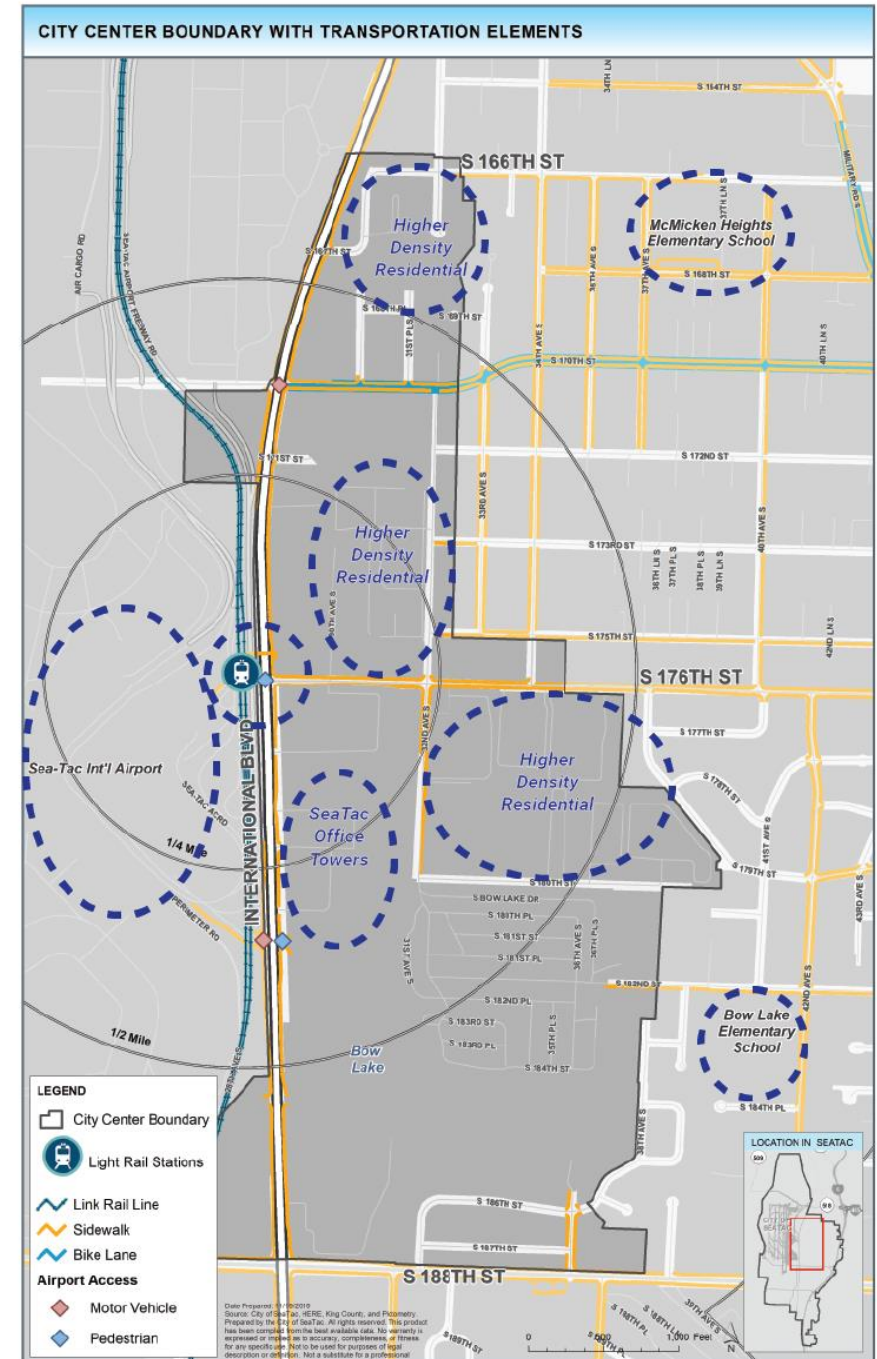
Existing photos of pedestrian crossing conditions and access barriers

Existing Barriers:

Transportation Network Demand Generators

Existing demand generators for motor vehicle and pedestrian traffic:

- Sea-Tac Int'l Airport
- SeaTac/Airport Link Light Rail Station and Transit Center (includes RapidRide bus stops & plazas)
- SeaTac Office Towers
- Higher Density Residential:
 - Between S. 166th St. & S. 168th St.; between S. 170th St. & S. 176th St. and, between S. 176th St. & S. 184th St.
- McMicken Heights & Bow Lake Elementary Schools (outside but adjacent to the City Center Area)



Existing Barriers: Transportation Network Demand Generators

Quarter-mile and half-mile radii shown on the map highlight generators within a 5 minute and 10 minute walk distance, respectively, of the SeaTac/Airport Link Light Rail Station and Transit Center.

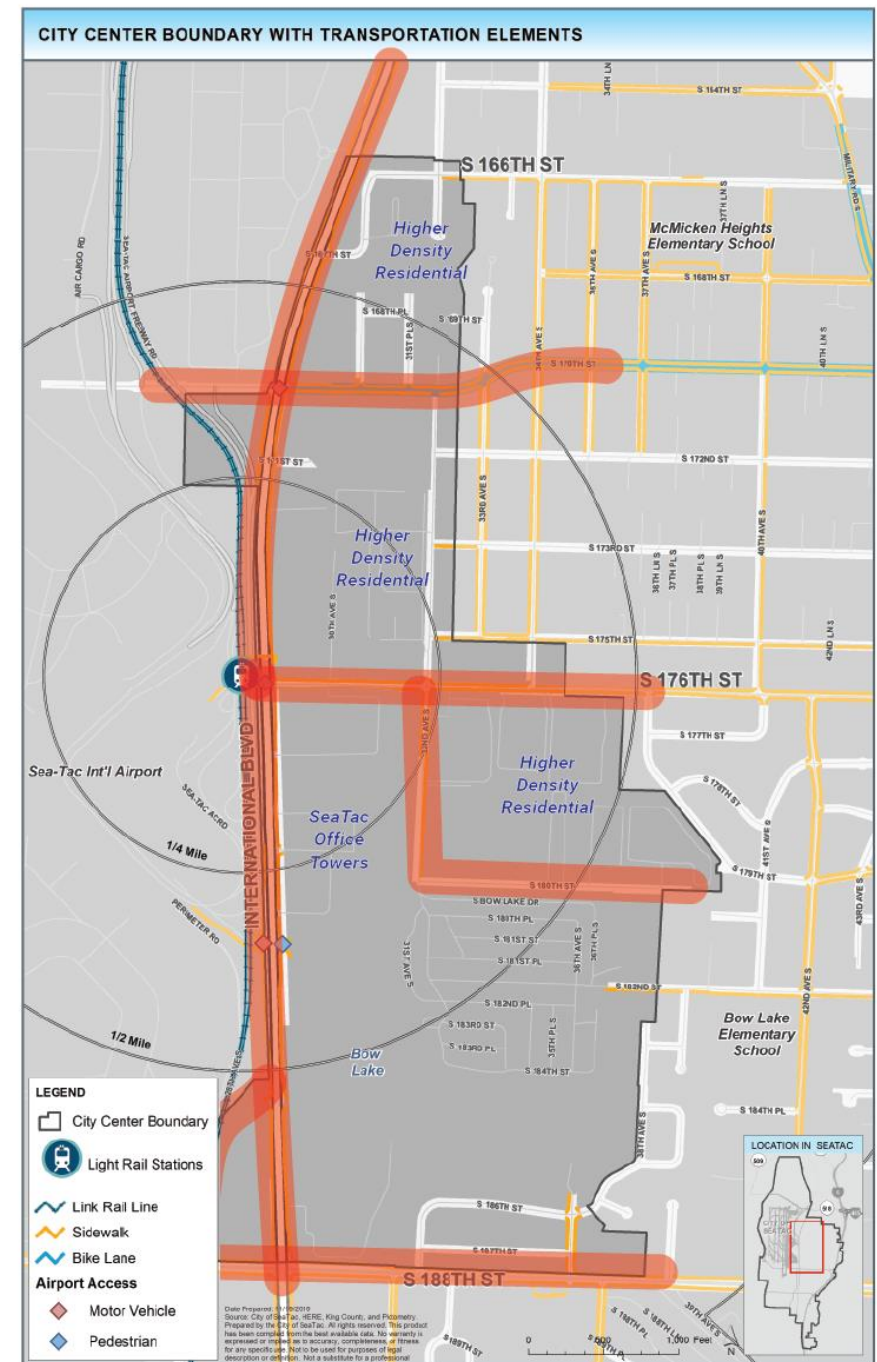
- Over half of the SeaTac Center City Area is within the 10 minute walk shed. The 10 minute walk shed includes the Sea-Tac Int'l Airport, the SeaTac/Airport Link Light Rail Station and Transit Center, the SeaTac Office Towers, and multiple clusters of higher density residential parcels.

Existing transportation barriers within the 10 minute walk shed limit access for motor vehicles and pedestrians to the SeaTac/Airport Link Light Rail Station and Transit Center. Addressing these barriers may generate significant access and mobility gains as the parcels are within a 10 minute walk of a key regional transportation resource.



Existing Barriers: Motor Vehicle Traffic

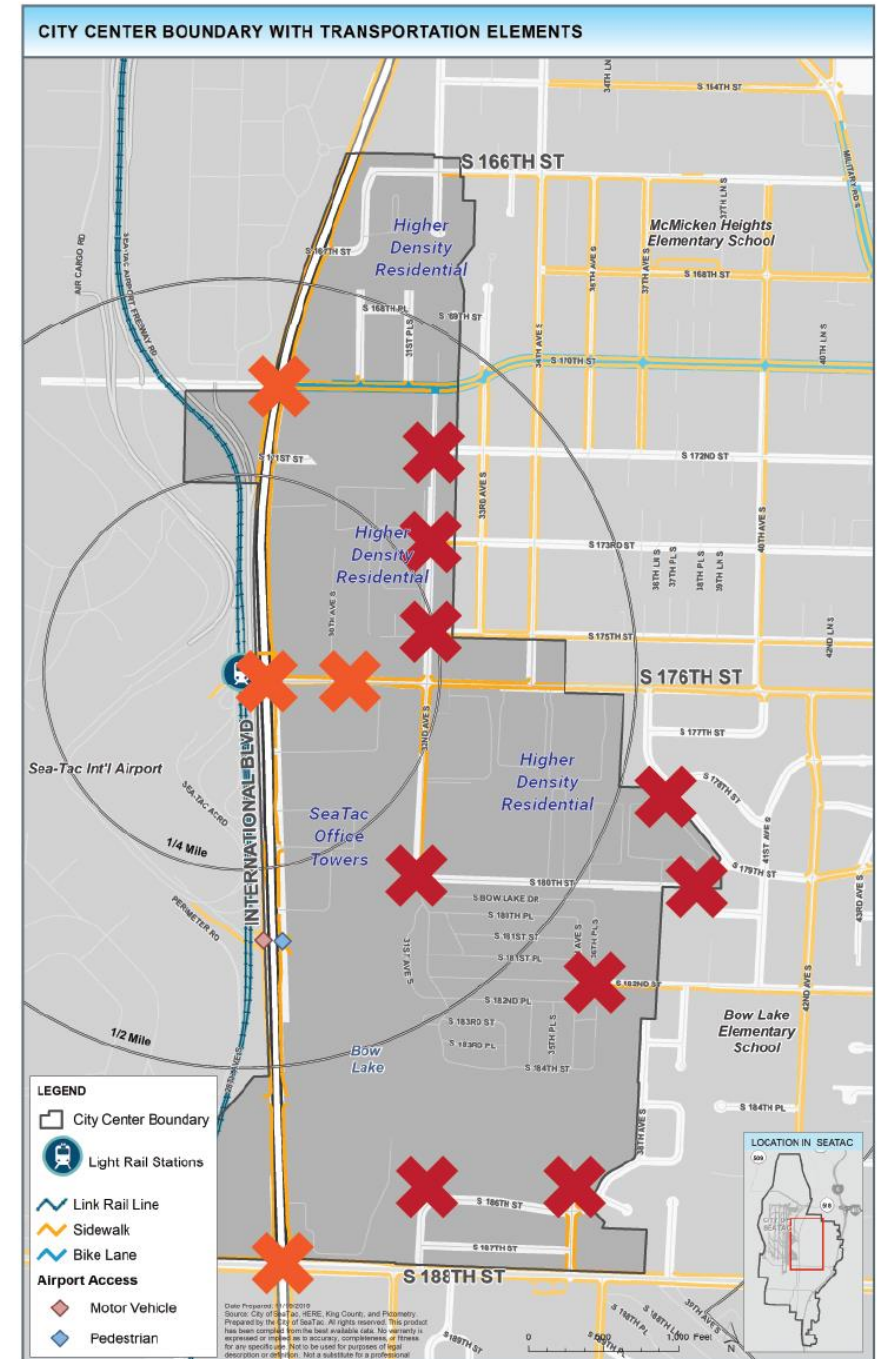
- The **key routes** for motor vehicle traffic include **International Blvd.**, the main north-south route in the area, and the **connecting through arterials and access roads to motor vehicle destinations**:
 - S. 170th St., S. 176th St., 32nd Ave. S. to S. 180th St., S. 182nd St., Arrivals Dr., Air Cargo Rd., and S. 188th St.
- Motorists primarily use International Blvd. to access the Sea-Tac Int'l Airport, and destinations within SeaTac and nearby cities in South King County.
 - International Blvd. is not a key route for regional motor vehicle traffic, such as for those traveling to Downtown Seattle.
(SeaTac Station Area Action Plan Market Analysis and Development Considerations, 2005)
- The restricted key routes network puts pressure on the area's limited connecting streets, and increases congestion at intersections along International Blvd.



Existing Barriers: Motor Vehicle Traffic

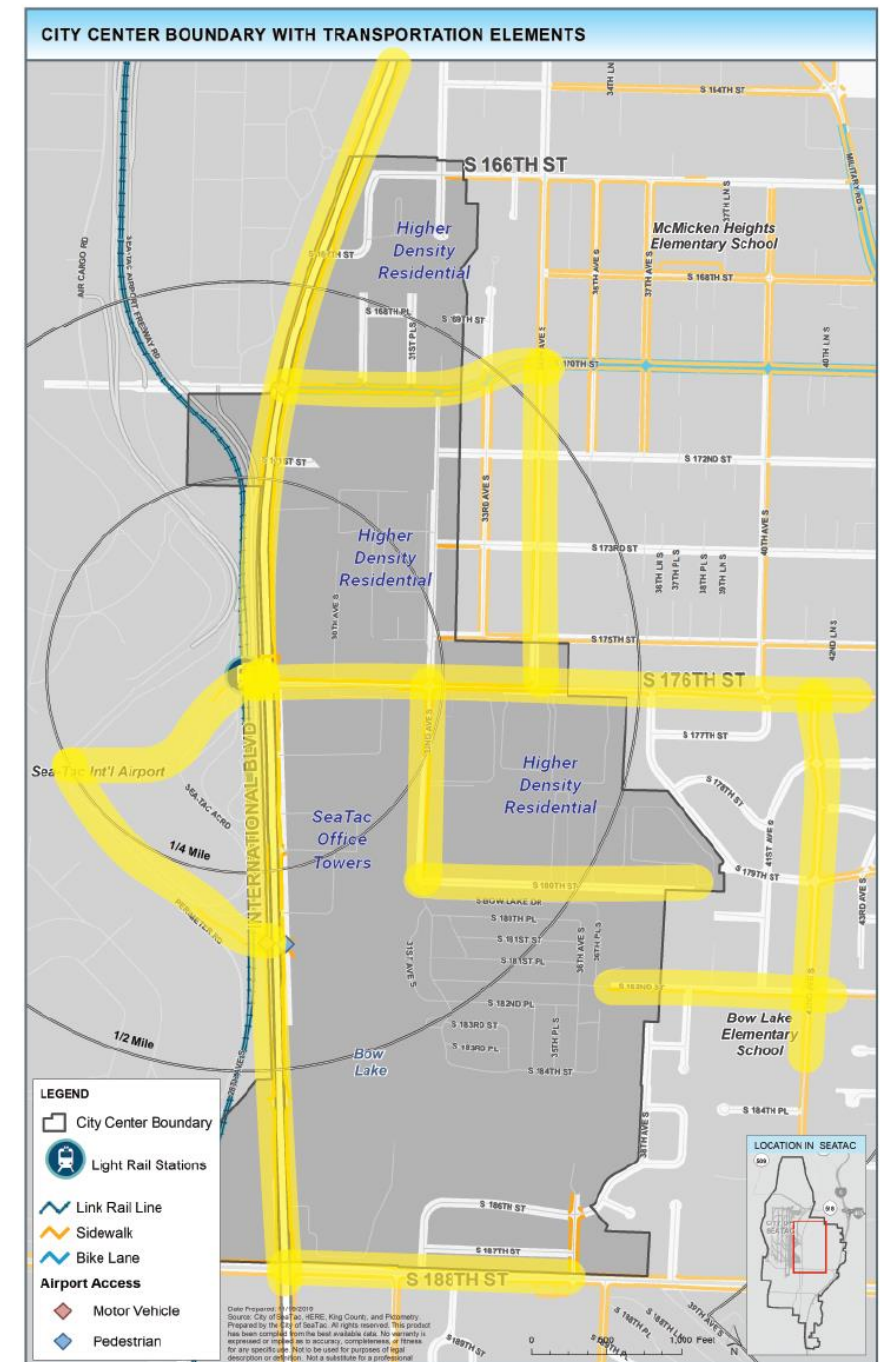
Barriers for motor vehicle traffic in the City Center Area push traffic onto connecting routes, increase congestion at intersections, and generate longer travel times and distances:

- ✖ **Turn restrictions** along International Blvd. and **limited driveway entrance options** into larger scale parcel.
- ✖ **Congestion at intersections:** International Blvd. and S. 170th St., bollards added in middle of S. 176th St. to prevent left turns into Kiss & Ride lot and related queuing problems on International Blvd.
- ✖ **Lack of internal circulation on larger parcels**, and connections between developments: SeaTac Office Center, and the Bow Lake Retirement Community.
- ✖ **Infrequent connecting streets** caused by dead-ends and fences / gates, and large scale developments.







Existing Barriers: Pedestrian Traffic

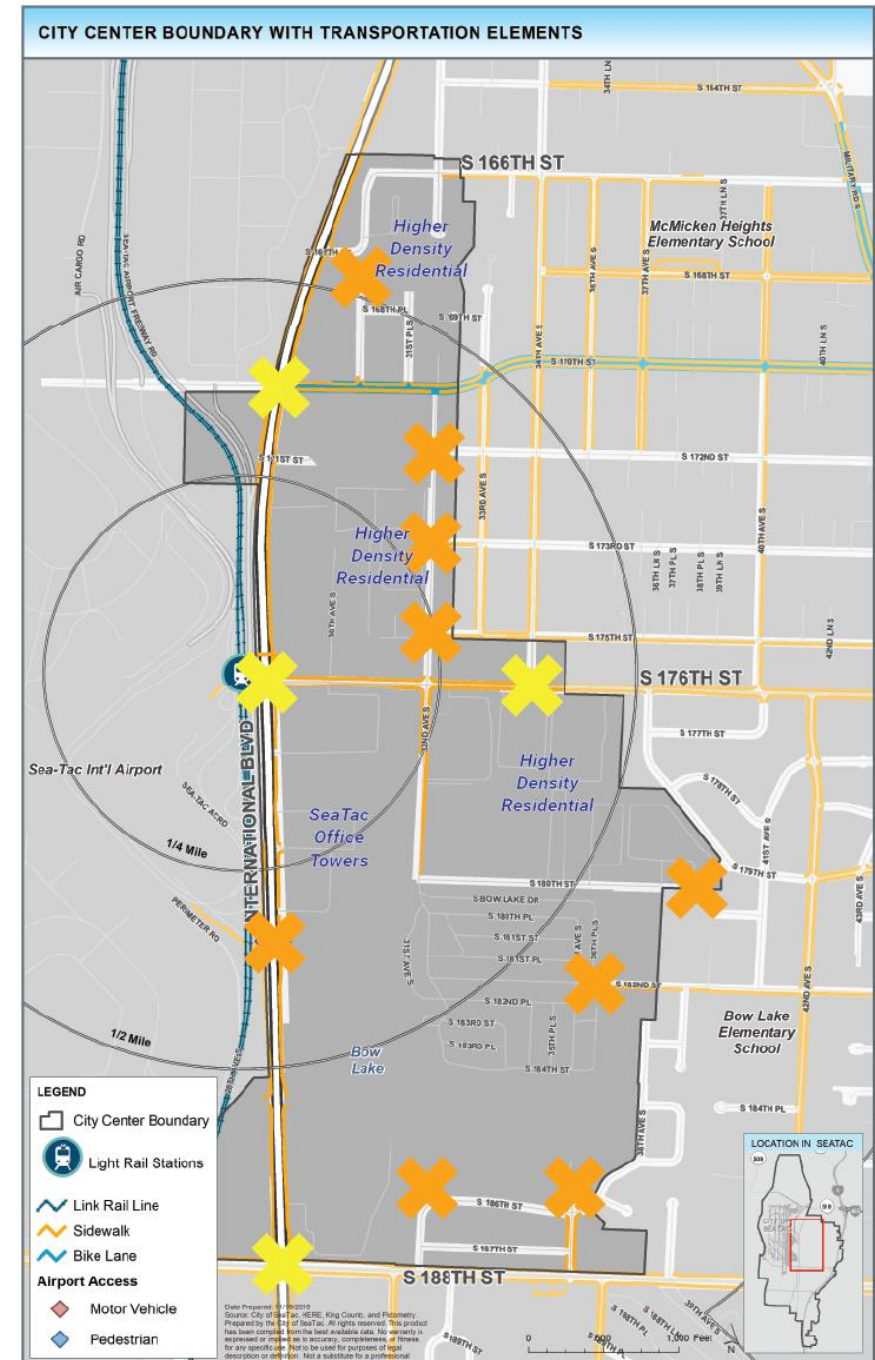
- The **key routes** for pedestrian traffic include **International Blvd.**, the main north-south route in the area, and the **connecting through arterials and access roads to pedestrians destinations**:
 - S. 170th St., S. 176th St., 32nd Ave. S. to S. 180th St., 34th Ave. S., 40th Ave. S., S. 182nd St., and S. 188th St.
- Pedestrian traffic is pushed to auto-oriented roadways (e.g. International Blvd., and S. 176th St.) where the Area's limited pedestrian facilities are located.
- Pedestrians experience extended wait times at intersections, long crossing distances, and few pedestrian amenities to support pedestrian trips in the Area.



Existing Barriers: Pedestrian Traffic

Barriers for pedestrian traffic in the City Center Area restrict opportunities for walking trips, encourage short-distance trips by motor vehicles, and limit opportunities for community members without regular access to a motor vehicle:

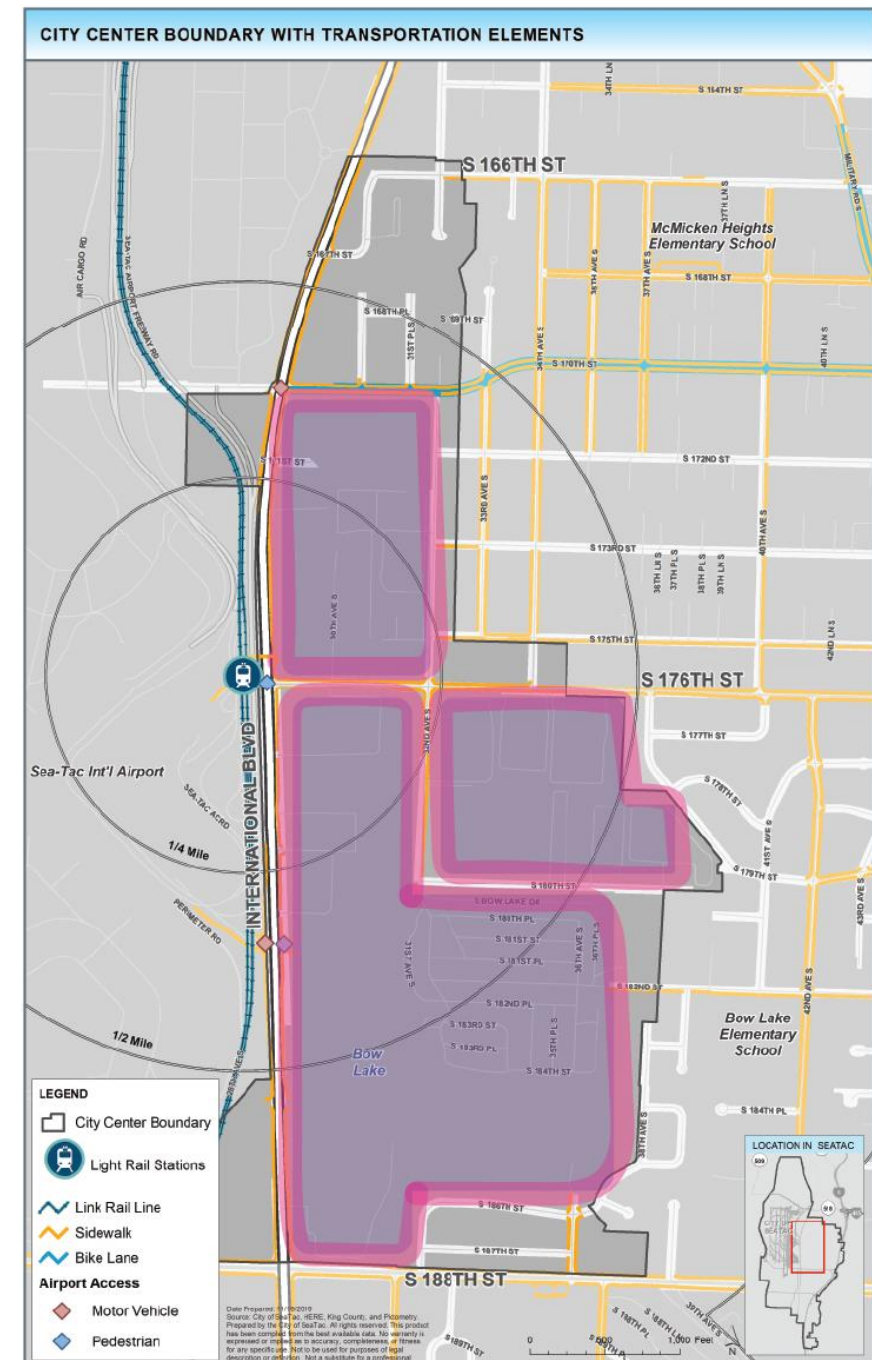
-  **Wide, auto-oriented intersections** (e.g. International Blvd. and S. 176th St.), and **lack of crosswalks between bus stops** (e.g. 34th Ave. S. and S. 176th St.)
-  **Short pedestrian crossing cycles** at intersections: International Blvd at S. 182nd St.
-  **Few pedestrian access options between the City Center Area and the Sea-Tac Int'l Airport**
-  **Lack of internal circulation on larger parcels, and sidewalk / pathway connections between developments** – especially for east/west connections: e.g. the Higher Density Residential Communities between S. 170th St. and S. 184th St.



Future Opportunities: Limitations in the Existing Transportation Network

Mega-block developments in the Area, and a lack of internal circulation and mid-block connections within the developments are threats to the Area's existing transportation system, and to future redevelopment opportunities.

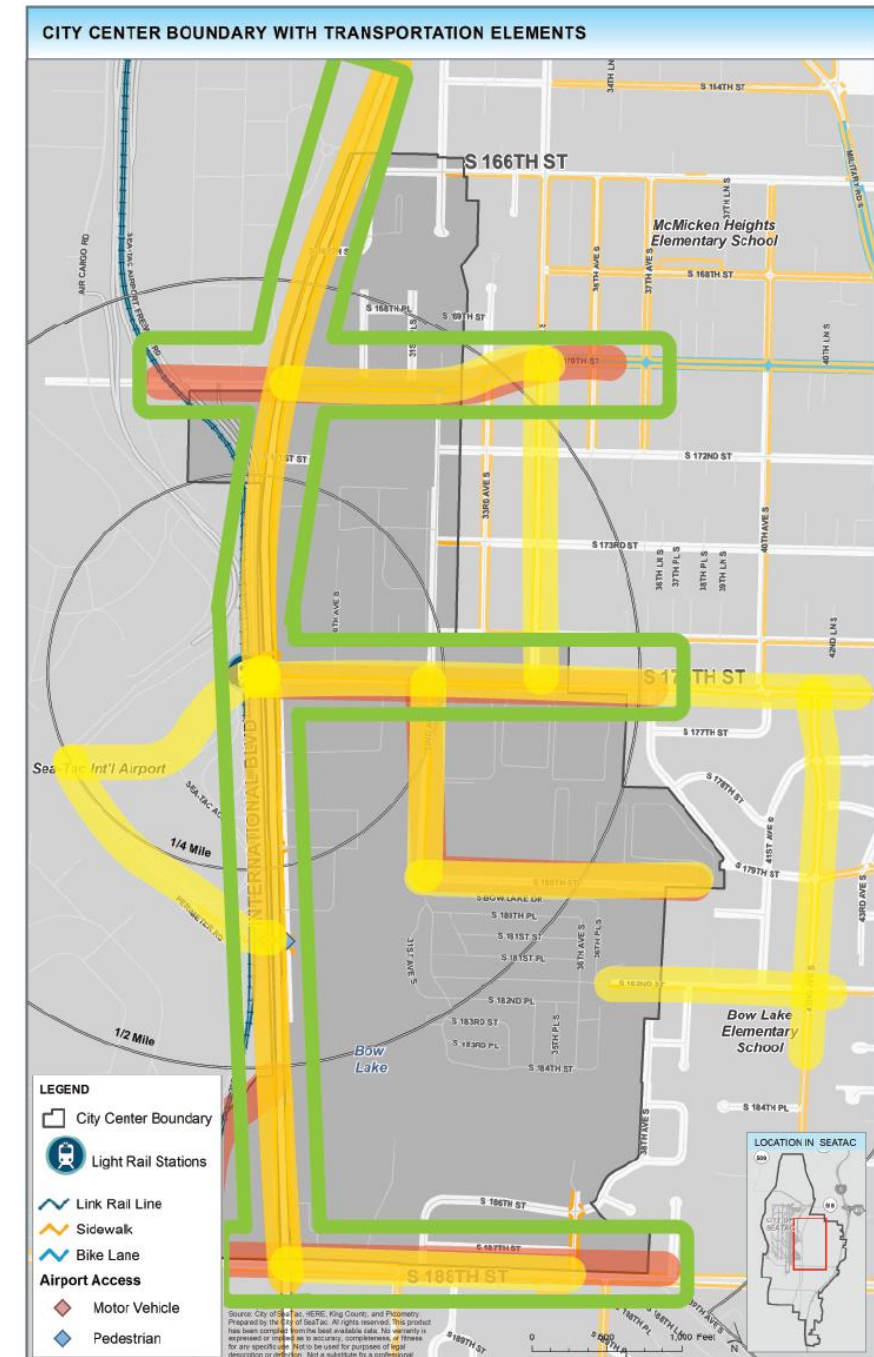
- Economic analyses for the Area identify transit-oriented development (TOD) opportunities, which have not yet been realized. TODs require walkable sites with access to multiple modes of transportation and connection points, which are limited on mega-block development sites.
- Mega-block developments limit the permeability of S 176th St. and International Blvd, two key routes for Area community members, employees, and visitors (including those using Sea-Tac Int'l Airport) to shop, work, and play in the Area.



Future Opportunities: Limitations in the Existing Transportation Network


Gaps in the **access network** generate additional stressors on the Area's existing transportation system, especially on the few connected key motor vehicle and pedestrian traffic routes that serve the Area.

- Gaps are due to **turn-restricted entrances** into mega-block developments, **few internal circulation elements** for motor vehicle drivers and pedestrians, and **private gates and fences**.
- **Access to and through the sites** for all modes (loading, visitors, workers and neighborhood connections) is critical for managing rising congestion due to economic growth in the Area.



Future Opportunities: Limitations in the Existing Transportation Network

- **Existing threats** to the transportation system's functionality include: turn restrictions, mega block developments, congested corridors, and lack of multi-modal facilities.
- **Future Opportunities** that would support the area's transportation system include:
 - Redeveloped parcels that include **access to and from the parcels**;
 - **Circulation within developments** to manage growing congestion; and,
 - Improvements to **vehicle and pedestrian connections** throughout the City Center Area.

- 

- Service drives, connected pedestrian network, strategic on-site parking locations.

- Congestion management, intersection improvements, transit services, and connections to the local pedestrian network.

CITY CENTER BOUNDARY WITH TRANSPORTATION ELEMENTS

LEGEND

- City Center Boundary
- Light Rail Stations
- Link Rail Line
- Sidewalk
- Bike Lane
- Airport Access
- Motor Vehicle
- Pedestrian

Map Labels:

- Sea-Tac Int'l Airport
- McMicken Heights Elementary School
- Bow Lake Elementary School
- International Blvd
- S 166TH ST
- S 176TH ST
- S 188TH ST
- S 164TH ST
- S 168TH ST
- S 172ND ST
- S 176TH ST
- S 180TH ST
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- S 188TH ST
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Inset Map: LOCATION IN SEATAC

Scale: 0 1000 Feet

Source: City of Seatac, H&R, King County, and Pedometry

Date Prepared: 10/10/2019

Disclaimer: This product has been prepared from the best available data. No warranty is expressed or implied as to accuracy, completeness, or fitness for any specific use that to be used for purposes of legal description or definition. Not a substitute for a professional.

Future Opportunities: Key Existing Transportation Network Opportunities

Motor Vehicle Traffic:

- Increase mobility for all modes and manage rising congestion
- Encourage internal circulation options during parcel redevelopments

Pedestrian Traffic:

- Address pedestrian network gaps and create districtwide pedestrian connections along public roads and internal circulation networks
- Identify places and opportunities for people who live, work, and visit SeaTac to comfortably walk

Future Opportunities:

Recommended Next Steps

- Improve **conditions for all modes** on current street network, especially for access to parcels and transit (light rail, rapid ride and bus)
- Strengthen **circulation** and **wayfinding** to light rail station kiss and ride for all modes
- Coordinate **mid-block, multi-modal access and connections** during redevelopment.
- Prepare **policies addressing modern transportation options** related to ride-hailing, ride-sharing, food delivery, autonomous vehicles and other transportation services and localized operations
- Implement a **catalytic streetscape project** in the Area that encourages motor vehicle traffic flow, creates pedestrian connections, and removes access barriers to transit services

- T'OOLE**
DESIGN



- T'OOLE**
DESIGN



APPENDIX C:

COMMUNITY ENGAGEMENT

- Community/Stakeholder Engagement Record of Activities
- Tyee High School Student Project Presentation
- Comments from Attendees of Community Planning Meetings #1 & #2
- Responses to On-line Project Questionnaire
- Community Engagement Summary
- Stakeholder Workshop Summary

City Center Plan Update Phase 1 Project: Community/Stakeholder Engagement Record of Activities

EARLY COMMUNITY OUTREACH

Community Stakeholders	
ACTIVITY	TIMELINE/NOTES
<u>Student Project: Tyee HS Students</u> (Walking audit, questionnaire gathering, presentation at City Hall)	<ul style="list-style-type: none"> • March 2019
<u>On-line Questionnaire: What do you do in the City Center?</u>	<ul style="list-style-type: none"> • Available on City Website from 4/12/2019-11/25/2019 • 29 responses received

BUSINESS & STAKEHOLDER ENGAGEMENT

Property Owners/Business Stakeholders	
ACTIVITY	TIMELINE/NOTES
<u>Interviews: Business stakeholder listening sessions</u> Property/Business Owners/Business Stakeholders <ol style="list-style-type: none"> 1) Boysen & Boysen LLC 2) Dollar Development 3) Crowne Plaza Seattle Airport 4) MasterPark 5) WallyPark 6) Urban Renaissance Group 7) Hilton (Airport & Double Tree) 8) Bow Lake Mobile Home Park 9) Seattle Southside Regional Tourism Authority Agencies <ol style="list-style-type: none"> 10) Port of Seattle 11) Sound Transit 12) King County Housing Authority 	<ul style="list-style-type: none"> • Fall 2019 • City's consultant completed 12 interviews
<u>Workshop: Stakeholder Charrette</u> Vision & urban design concept workshop for business/property stakeholders	<ul style="list-style-type: none"> • 11/26/2019, approx. 22 attendees • Hilton Seattle Airport donated conference room for event

TARGETED ENGAGEMENT

Community & Business Stakeholder Outreach	
ACTIVITY	TIMELINE/NOTES
Business-Related Groups	
<u>Briefings:</u> Hotel Motel Tax Advisory Committee	<ul style="list-style-type: none"> 9/11/2019 & 12/11/2019
Employees/Workers	
<u>Focus Group:</u> Airport Workers	<ul style="list-style-type: none"> 9/27/2019, held on-site at airport in conference room
Residential/Community Stakeholder	
<u>Meeting:</u> Windsor Heights Apartments Property Management	<ul style="list-style-type: none"> 9/11/2019, at Windsor Heights
<u>Focus Group:</u> Windsor Heights Apartments Residents	<ul style="list-style-type: none"> 10/14/2019, in New Futures Community Center located on Windsor Heights property
<u>Focus Group:</u> Bow Lake Mobile Home Park HOA	<ul style="list-style-type: none"> 11/4/2019, held as part of HOA meeting at Bow Lake MHP
<u>In-Person Discussion:</u> Chinook Manor Condominium HOA President	<ul style="list-style-type: none"> Spoke with HOA president twice at City Hall

COMMUNITY PLANNING MEETINGS

ACTIVITY	TIMELINE/NOTES
<u>Bulk Mailing:</u> Meeting Flyer Advertising both Community Planning Meetings	<ul style="list-style-type: none"> Mailed to approx. 3,000 addresses within & adjacent to City Center boundary
<u>Community Planning Meeting #1:</u> What's your Vision?	<ul style="list-style-type: none"> 10/23/2019, approx. 23 attendees Held at McMicken Heights Elementary School
<u>Community Planning Meeting #2:</u> Confirm the Vision	<ul style="list-style-type: none"> 12/11/2019, approx. 12 attendees Held at McMicken Heights Elementary School



City Center Rebranding & Placemaking Project

April 5, 2019

Tyee High School, Advanced Marketing
SeaTac City Hall

INTRODUCTIONS

City of SeaTac

Kate Kaehny, Senior Planner

Tyee High School

Alana Vinther, Teacher

Student self-introductions:

- Name, Year at Tyee (*senior, junior, etc.*)
- Years living in SeaTac
- Plans after high school

STUDENT PRESENTATIONS

1. Introduction to Advanced Marketing Class

Elizabeth, Emely, Jesse

2. Rebranding the City

Jenny & Madelyn

3. City Center Infographics

Monty, Prabhmeet & Malina

4. Walking Audit/Wayfinding Project

Maria & Carmen

5. Questionnaire Findings

Angel, Hugo & Jesse

6. Charrette/Workshop Findings

- Team City Center: Kyndal, Emely, Elizabeth
- Team Something Else: Bobby & Nathan

1) INTRODUCTION TO ADVANCED MARKETING CLASS



ADVANCED MARKETING CLASS



2) REBRANDING THE CITY OF SEATAC

Learned in Class:

“A strong place brand helps a place compete in the global marketplace...and attracts people and investment to your place.”

(Planningtank.com)



REBRANDING THE CITY OF SEATAC

Assignment:

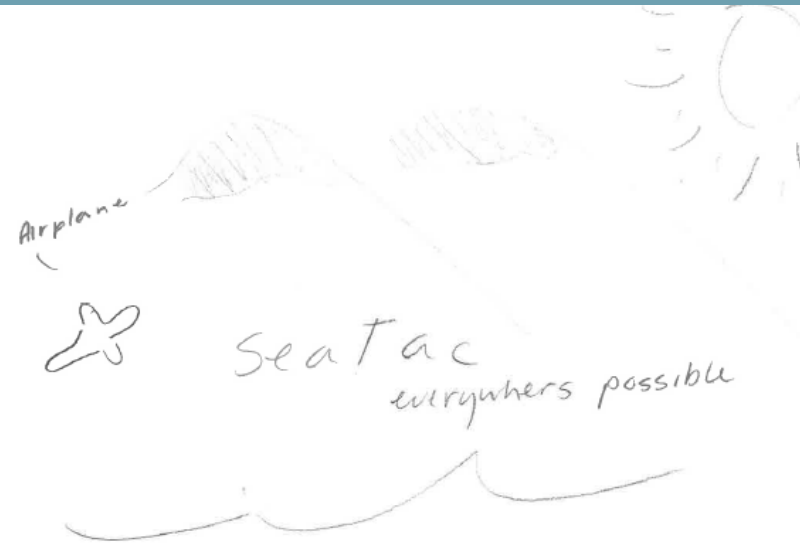
Suggest a new brand for the City of SeaTac.



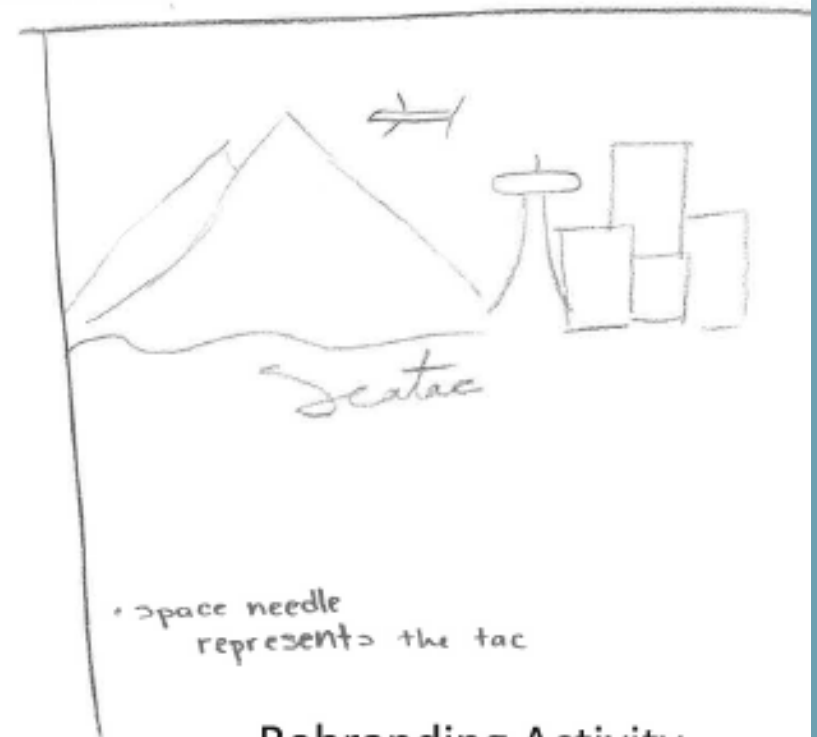
REBRANDING

Results:

HOTELS



City of Seatac



• space needle
represents the tac

NAME: Malina Collier

Rebranding Activity
City Center Plan Update Project
Tyee High School



Rebranding Activity
City Center Plan Update Project
Tyee High School



3) CITY CENTER INFOGRAPHICS

Learned
in
Class:



You are looking at one! Infographics are a fun and quick way to learn about a topic without a ton of heavy reading. There are many different styles of infographics and data visualizations, but the ultimate goal for all infographics is to be shared. Learn what makes a great infographic, why they are useful for everyone, some tips to create a viral infographic and the numbers to back it all up.

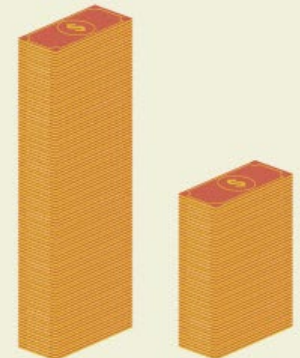
AN INFOGRAPHIC IS:



A data-rich visualization of a story or thesis



A tool to educate and inform



A way to build brand awareness and inbound links at half the cost of standard online marketing campaigns

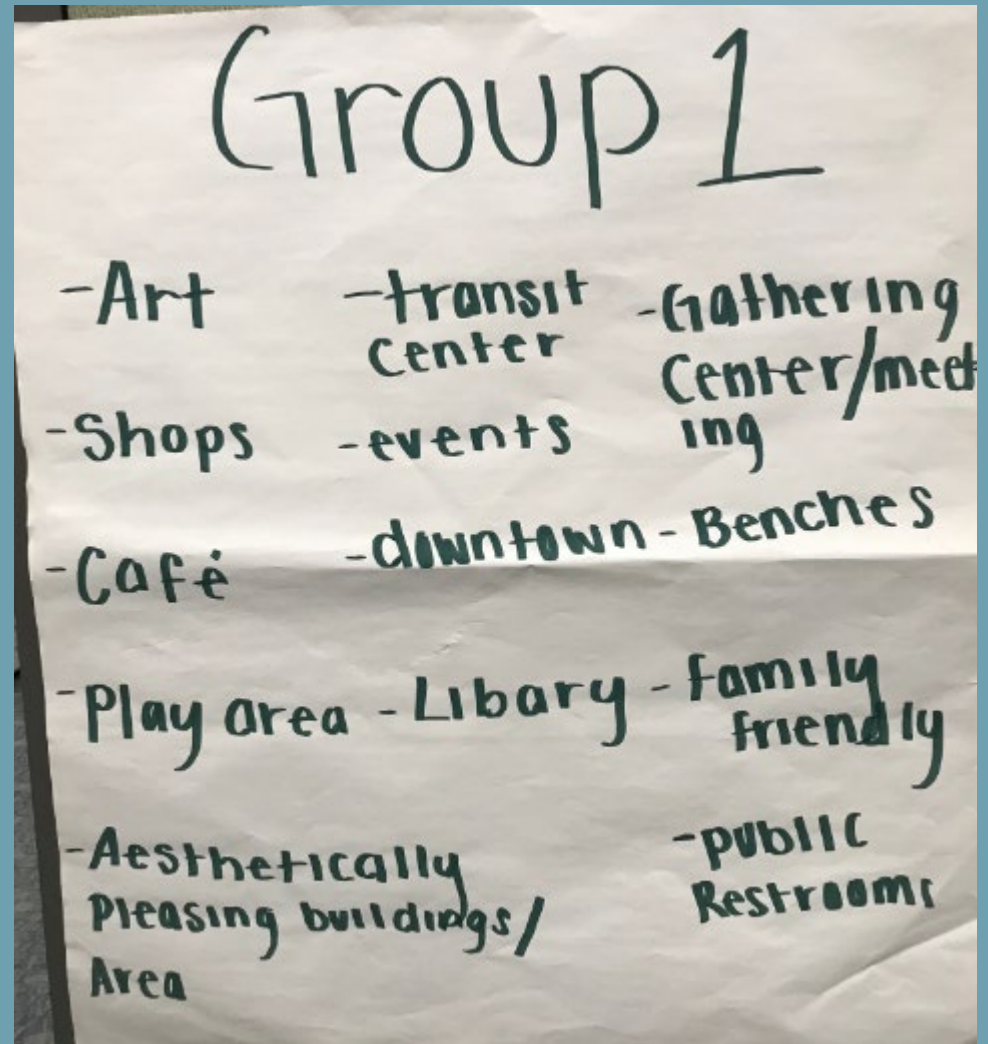
INFOGRAPHICS

Assignment:

“Team City Center”

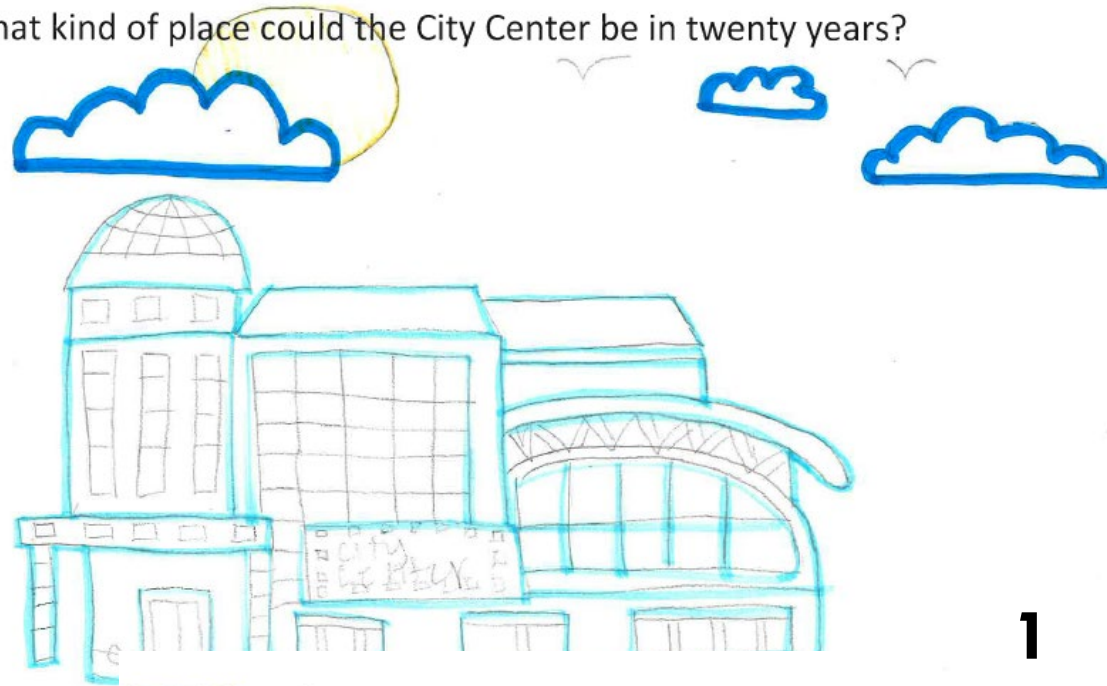
**Brainstorm &
Infographics:**

What types of destinations would make the existing City Center more like a City Center?

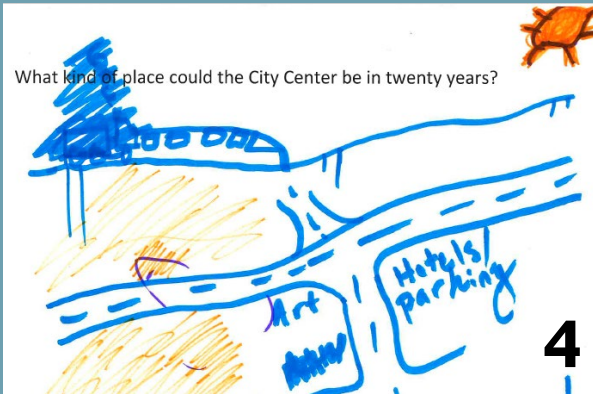


Results:

What kind of place could the City Center be in twenty years?

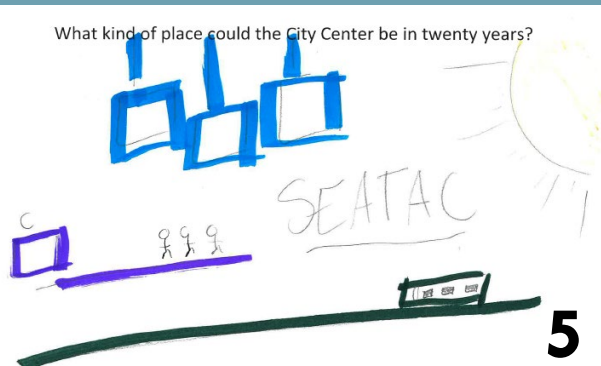


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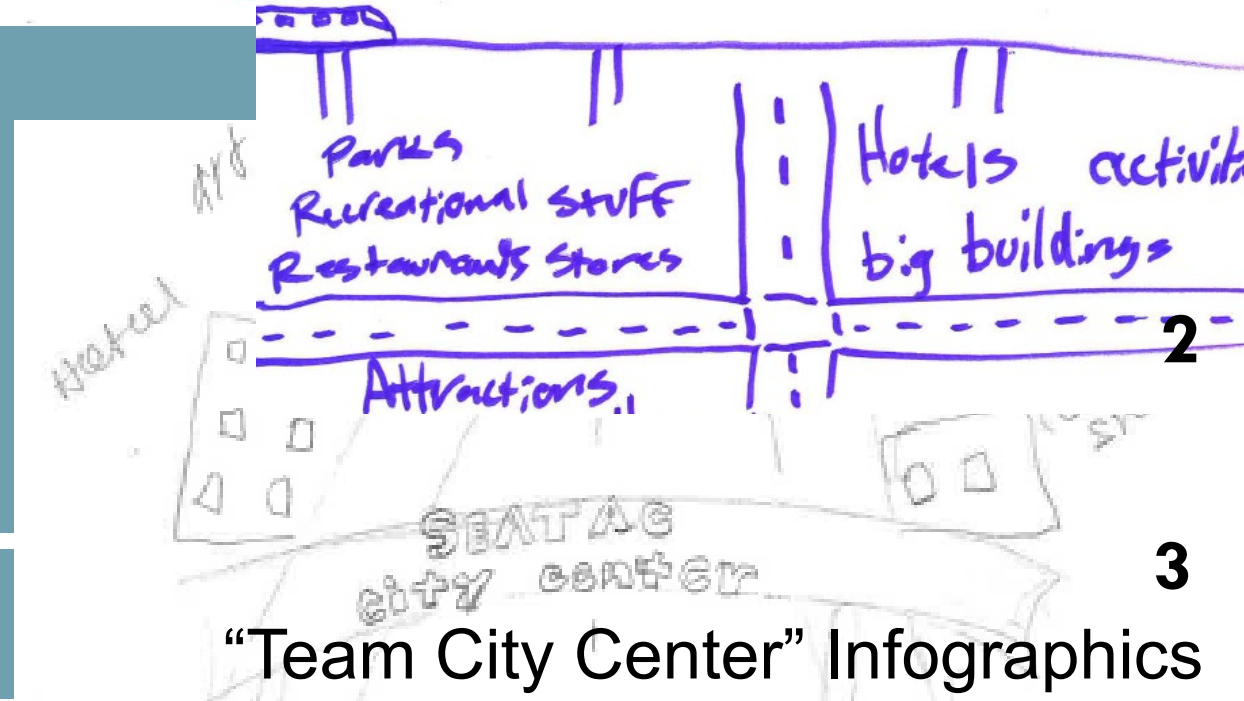


4

What kind of place could the City Center be in twenty years?



5

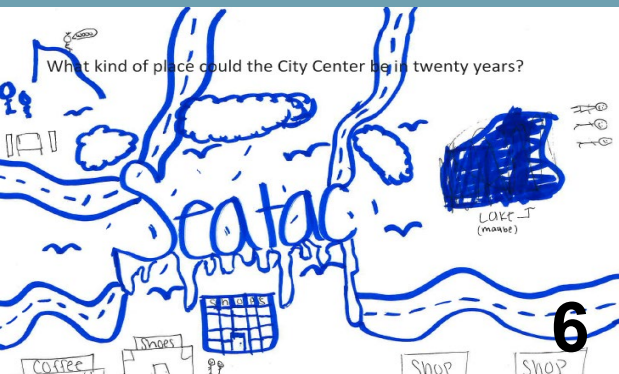


2

3

"Team City Center" Infographics

What kind of place could the City Center be in twenty years?



6

INFOGRAPHICS

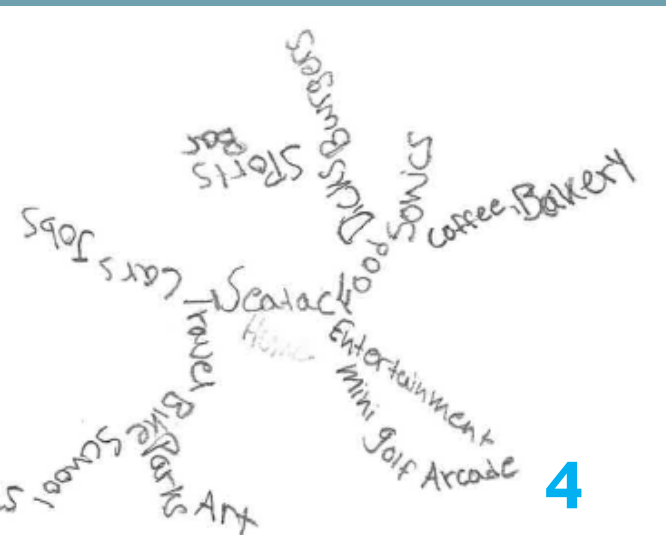
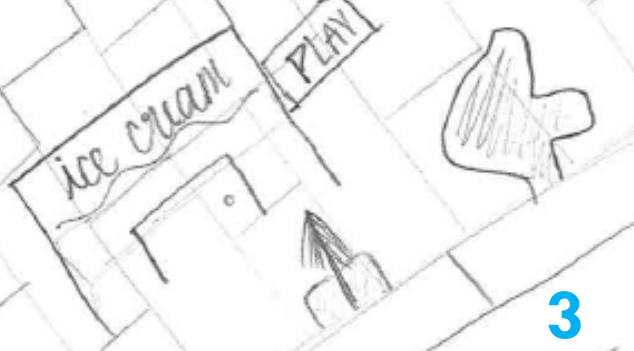
Assignment:

“Team Something Else”

Brainstorm &
Infographics:

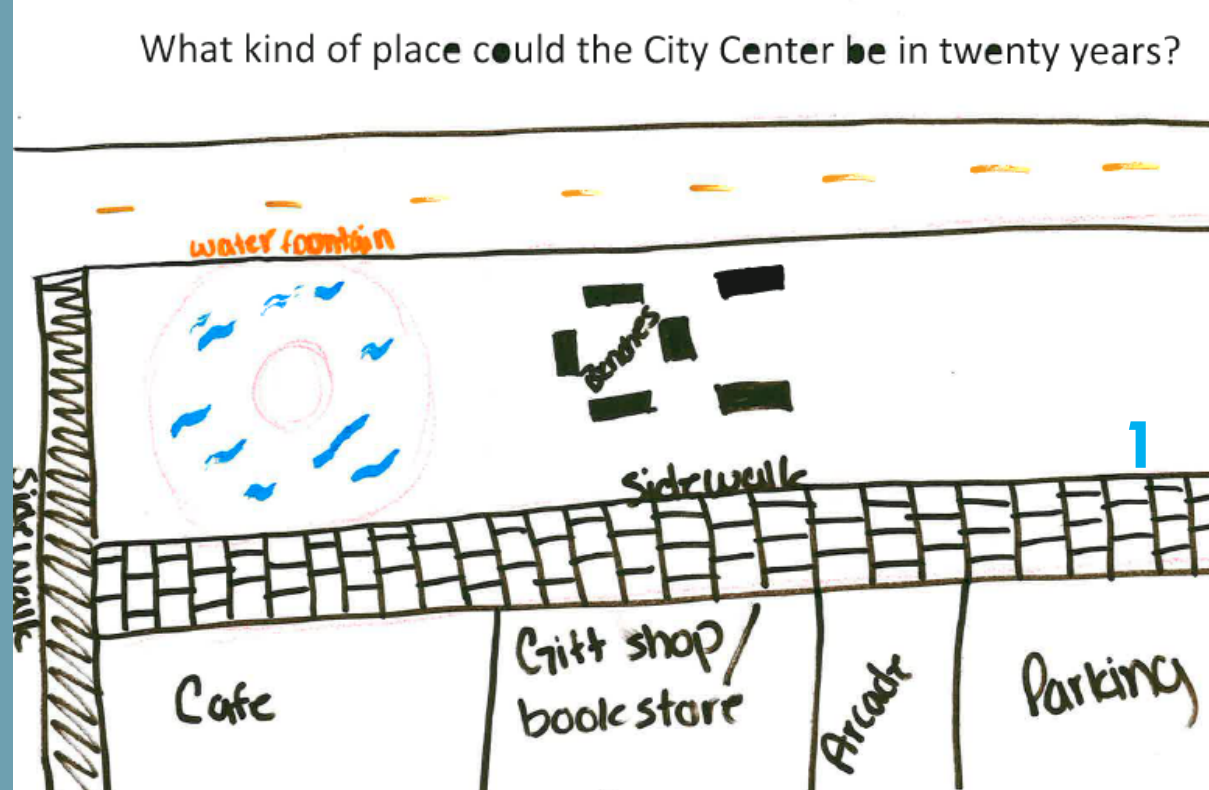
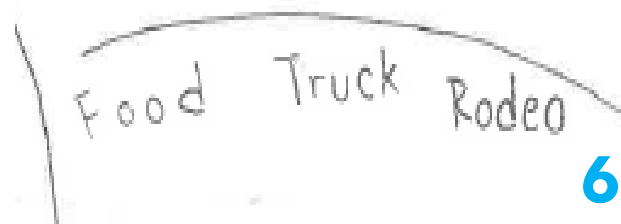
What types of destinations would make more young people want to visit the area?

- Coffee Shop
- Park
- McDonald's
- Café
- Arcade
- Movie theater
- Drive in Movies
- Cold Stone (Ice cream)
- Shops
- ~~Ice~~ Taco Truck
- Food Truck Rodeo
- Bathroom
- Art



- Restaurants
- side walk ★
- Arcade
- Every month there's a party bc why not ★★
- Aquarium

5



Results:

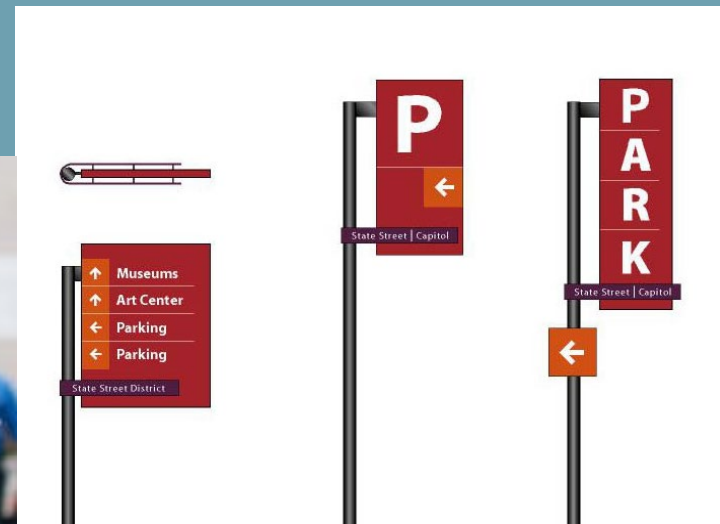


2

"Team Something Else" Infographics

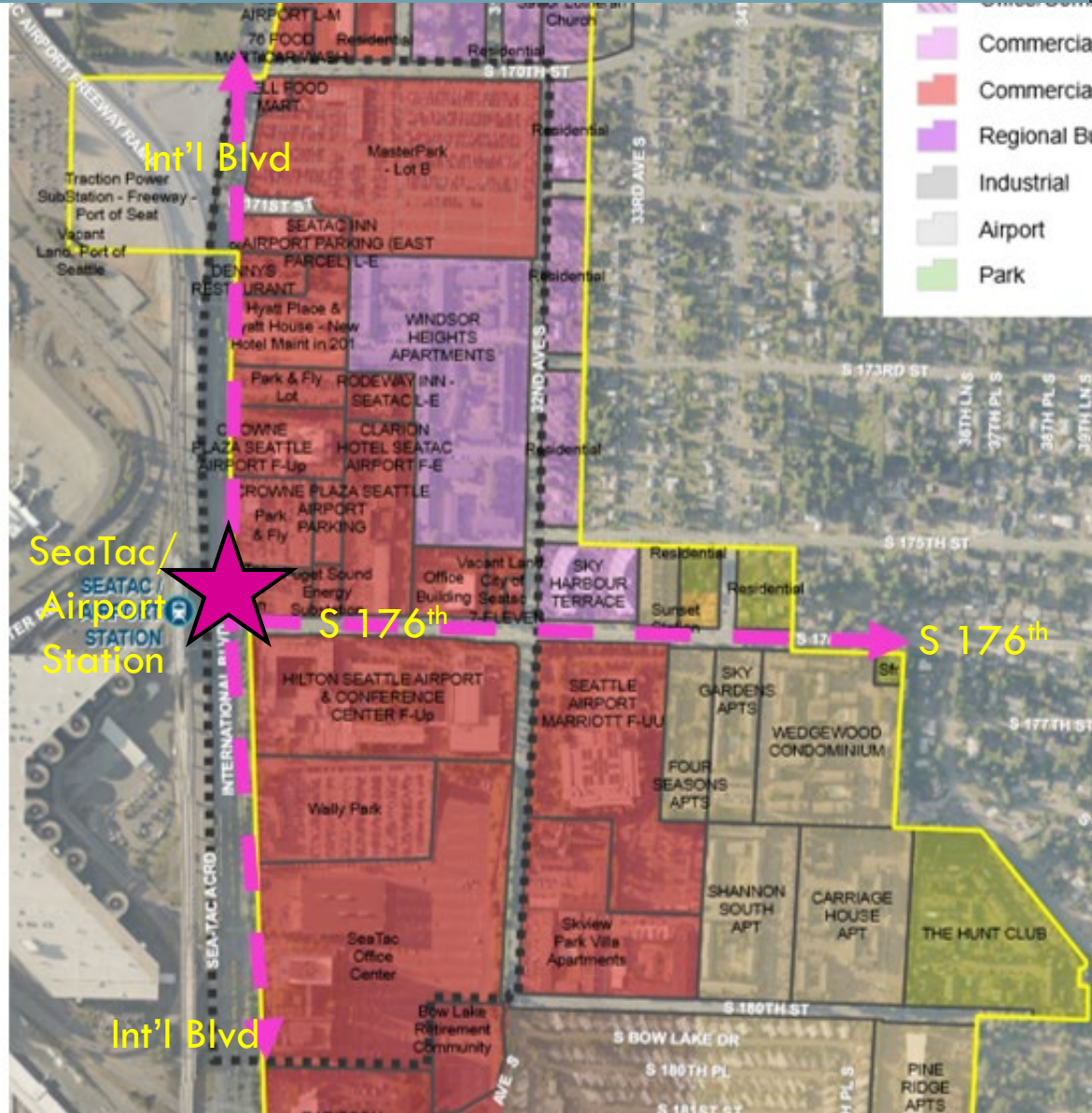
4) WALKING AUDIT/WAYFINDING

- **Learned in Class:**
 - What is a walking audit? A way to learn about a place by walking there and recording the experience.
 - What is wayfinding? “Wayfinding” means how we find our way around – with signs or other things.



City Center Walking Audit

Routes:



Assignment:

Walking Audit: Walk along four different routes in the City Center & record the experience at the 5", 10", and 15" distances from the light rail station.

- Is it a safe place to walk?
- Is it a nice place to walk?
- What kind of place is it? (types of destinations, etc.)

Wayfinding Project: Take pictures to help record & promote the area.



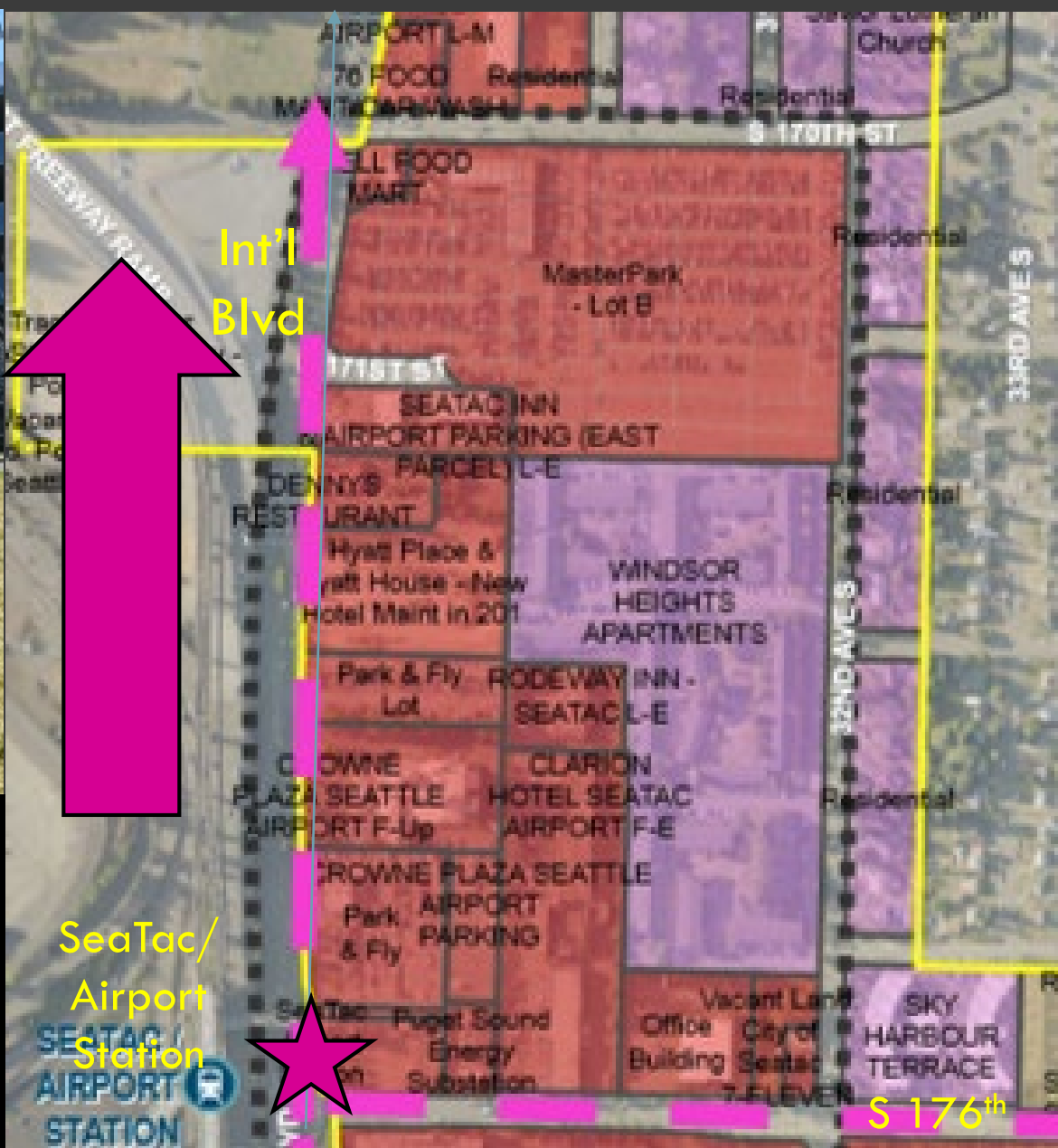
WALK SEATAC

It's a
5-minute walk
to
SeaTac/Airport Station



Notes:

- Restaurants, gas stations, garage, hotels
- No crosswalk sign
- Trees take up 1/3 of sidewalks



Results: Alena's Group

Results:

Jenn's Group

Notes:

- Safe-feel good, calm
- Airport, feeling busy, flags, workers

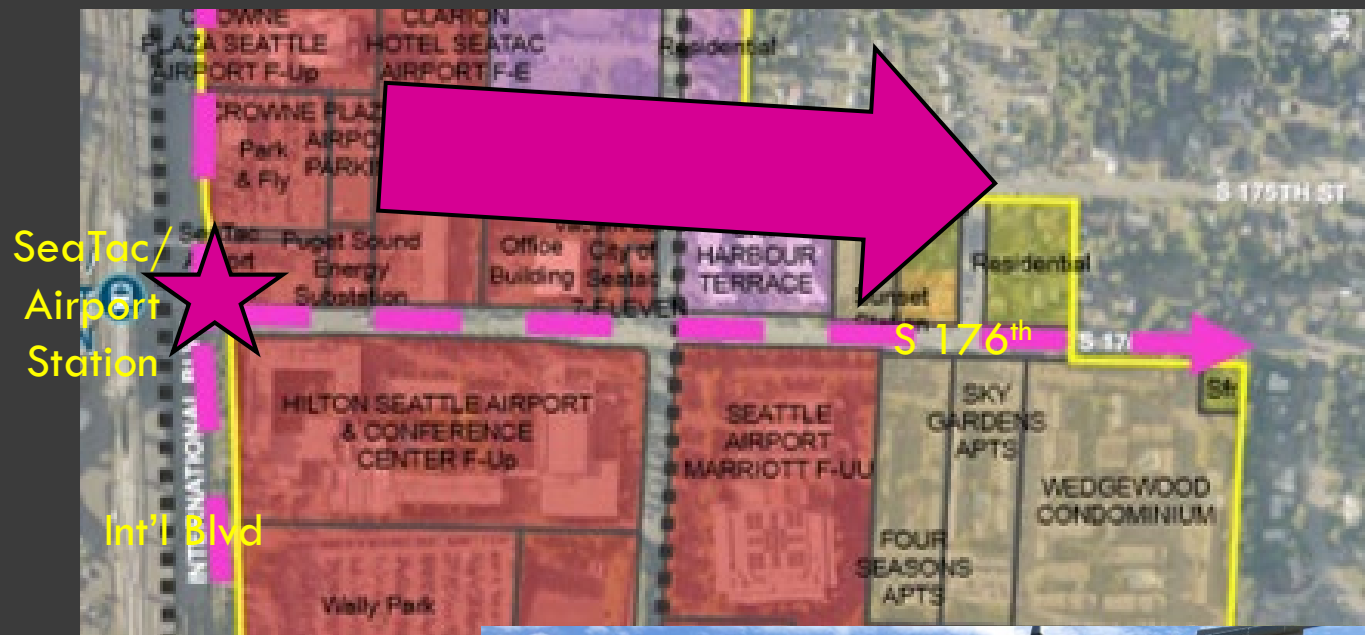


Results:

Steve's Group

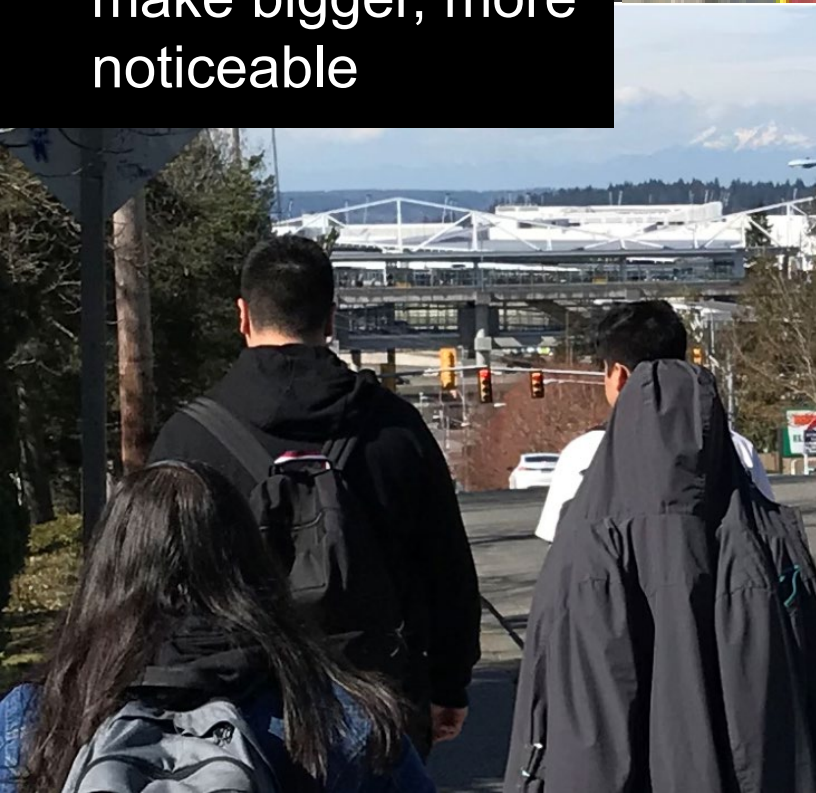
Notes:

- Sidewalk not for more than 2-3 people
- Plaza doesn't feel like plaza
- Feels safe
- Residential



Notes:

- Good view
- Maybe some stores other than 7-Eleven
- Ok signs, kinda hidden, maybe make bigger, more noticeable



Results: Kate's Group

5) QUESTIONNAIRE

Learned in Class:

- Questionnaires are one of many techniques to get input from the community.

Assignment:

- To help the City better understand how people use the City Center, collect at least ten questionnaires.
 - Eight from students
 - Two from adults

Results:

Total Collected: 137

- Students: 84
- Adults: 51
- Unknown: 2

SeaTac Residents: 85

- Students: 56
- Adults: 29

Students who Live in City Center: 13

Adults who Live & Work in City Center: 2

Do you live, work, or visit the area the City of SeaTac calls the City Center? *(See map)*

ABOUT YOU

Question 1

Please check all the boxes below that apply to you:

- ☐ Go to school in SeaTac
- ☐ Live in SeaTac
- ☐ Live within the City Center boundary *(see map)*
- ☐ Work in SeaTac
- ☐ Work within the City Center boundary *(see map)*
- ☐ None of the above. I live in or near _____

Sample Responses:

Question 10: List the places you go in the City Center.

- My house, friend's houses, relative's houses, restaurants, work, airport, hotels

Question 11: What kind of places do you think are missing in the City Center that aren't there now?

- Bakery, coffee shop, park area, more sidewalks, clinics, shopping center, Starbucks, attractions, amusement park, aquarium, grocery store, Target, Walmart

6) CITY CENTER CHARRETTE

Learned in Class:

- A “charrette” is a like workshop where groups work collaboratively to solve a problem.

Charrette



A charrette, often Anglicized to charette or charet and sometimes called a design charrette, is an intense period of design or planning activity. The word charrette may refer to any collaborative session in which a group of designers drafts a solution to a design problem.

Assignment: Address the problem -
What kind of place should the City Center be? A City Center? or, Something else?

Steps:

- 1) Group Brainstorm**
- 2) Separate into Two Teams:**
 - Team City Center
 - Team Something Else
- 3) Power of 10 - Each Team identifies:**
 - 10 reasons/places that define it now
 - 10 reasons/places that would help with placemaking in the future
- 4) Identify your Branding Suggestion**

Team City Center Results:

Brainstorm

Characteristics of
a city center

Burien Town Center

People gathering (inc family)
Businesses
Walkable
Art
Design
Compact
Transit
oriented
development

Library / City F.M.
Open Space / Plaza Fountain
Residential (Apt)
Trans. Center

Seattle Center

Clustered Businesses
Walkable
Bike lanes
Ship lights for safety
People Gathered

Open space
Fountain
Attractions - Science center
Space needle
Pike Place Mkt
Lions Bikes
Water - Piers - Views

Taroma

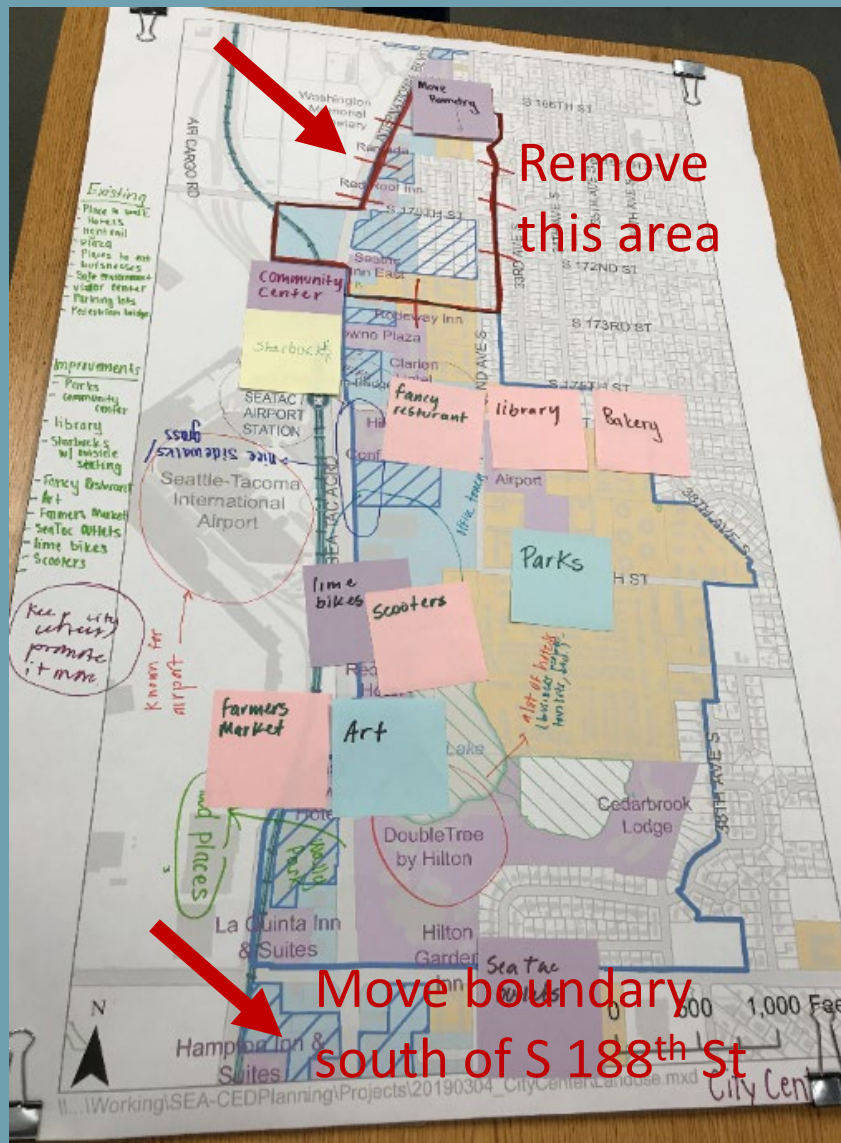
- Dome
- car Museum
- Glass Museum
- walkable
- people gather

Kent Station
Renton Landing

10 Existing Reasons Why it's a City Center Now:

- Places to walk
- Hotels
- Light rail
- Plaza
- Places to eat
- Businesses
- Safe environment
- Visitor Center
- Parking Lots
- Pedestrian Bridge





10 New Reasons/ Improvements that would Make it More of a City Center:

- Parks
- Community Center
- Library
- Starbucks with outside seating
- Fancy restaurant
- Art
- Farmers market
- SeaTac Outlets
- Lime bikes, scooters

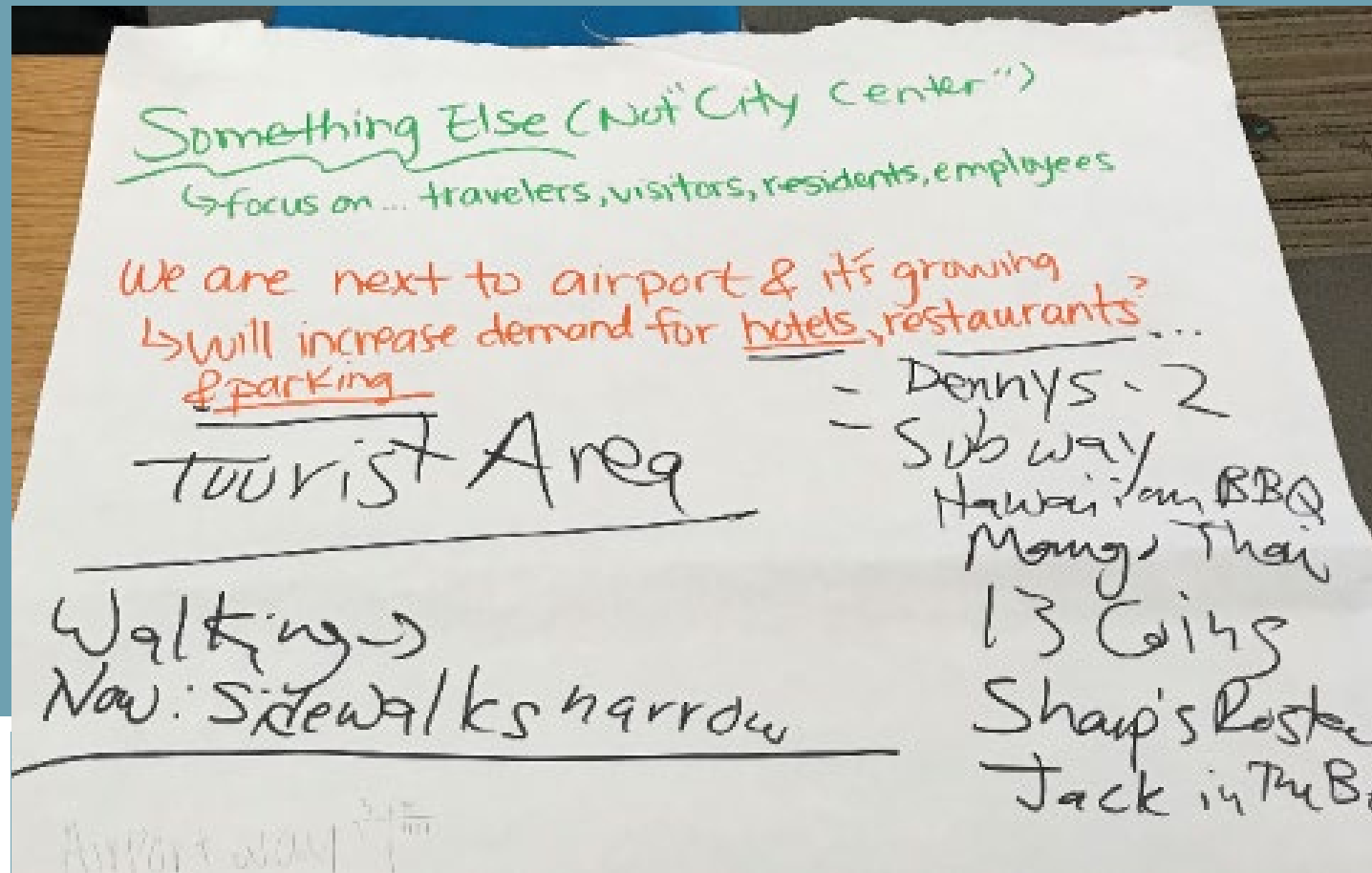
- **Team City Center Branding**
Suggestion:
 - Keep the name/brand:
“City Center”



Team Something Else Results:

Brainstorm

Characteristics of “something else/not city center”



10 Existing Reasons Why it's Something Else Now:

- Airport
- 17 Hotels
- 2 Denny's
- Jack in the Box
- Subway
- Mango Thai
- Hawaiian Barbecue
- Sharp's Roasthouse
- 13 Coins
- Park and fly



10 New Reasons/Improvements that would Make it More of a Place for “Travelers, Visitors, Residents, Emplo

- Art (including crazy art...)
- Coffee shop
- More grocery stores
- Other shops, Sonic
- Park
- Public bathrooms
- Benches
- Water fountain
- Food trucks at “kiss & ride”/light rail drop off area
- Indoor garden/butterfly center



Team Something Else

Branding Suggestion: Change the name/brand – some ideas:

Airport Way

Blvd Way

Airport Place

Nation Blvd

International Way

International

East Sea

Seaway





& don't forget,
SeaTac's #1!



Written Comments from Attendees of Community Planning Meetings #1 & #2

10/23/2019 Community Planning Meeting #1

McMicken Heights Elementary School

Approximate Number of Attendees: 32

QUESTION: Please tell us about DRIVING in the City Center area.

- **What improvement could make it easier to get around?**
 - For example, improvements to streets, intersections, street crossings, sidewalks, connectivity, lighting, signage, safety, or others.
- **Please write down the name of streets or intersections and be as specific as you can.**

RESPONSES:

International Blvd

- Handicap parking around International Blvd is difficult to find
- Roads & improvements along International Blvd are good! Sidewalks are also good.

S 166th

- Don't compromise the width of the street to build sidewalks such as 166th. People will park along the street.
- Do not implement improvement like on S 166th St
- Corner of 31st/166th lots of car accidents

S 167th

- Sidewalks on 167th near IB

S 170th

- 40th & S 170th: Flashing red light 4 way stop signs
- Bring back bus route that was on 170th
- On S 170th at IB, allow straight traffic right turn lane

Military Rd

- Left turn lane needed on Military Road @ Safeway/Galliano's

S 176th

- 176th St: South end of street big trees block pedestrian lighting. Make structure pruning of trees to let more light in BUT NOT top off tree
- Better lighting in pedestrian areas on south side of 176th near light rail station

SeaTac/Airport Light Rail Station & Transit Center

- Parking area at SeaTac station more covered areas to protect pedestrian & people waiting for Uber or pick ups from the rain
- Better access to SeaTac light rail station

S 180th

- Lighting/walkways down S 180th
- Need back end exit on 180th St through woods. There is no emergency way out of 180th with hundreds of apartment people maybe stranded.
- Entry gate to Bow Lake Mobile Home Park on corner of 32nd Ave S and 180th: People do not stop at stop sign from 180th going west. Lots of accidents and close calls.

S 188th

- Speed on 188th & speed in residential areas!

Airport Access Roads

- Access to Airport Access Road north bound to get to westbound 518 w/out driving thru airport. (via 170th or ability to make a left from East bound 154th).

Military Rd S

- Military Rd-from ~162nd to ~160th to International Blvd – repave add sidewalks – two lanes to one going up hill???
- Finish the center turn lane on Military Rd @ Safeway on down to International Blvd
- 35th Ave S B/T 170th & 168th needs new sidewalks & shoulders
- Military Rd – Safeway intersection. Repave and re-organize. Needs infrastructure & sidewalks.
- 42nd/Military Rd S getting traffic diverted from IB due to street diet from Tukwila

QUESTION: Please tell us about WALKING in the City Center area.

- **What improvement could make it easier to get around?**
 - For example, improvements to streets, intersections, street crossings, sidewalks, connectivity, lighting, signage, safety, or others.
- **Please write down the name of streets or intersections and be as specific as you can.**

RESPONSES:

Various Comments

- Walking or driving I think the City of SeaTac does a fantastic job of keeping the roads up. Especially proud of the no litter everywhere. Great job.
- Difficult with traffic, especially walking in crosswalks when shuttles and cars turning on red lights (but legal right turn after stopping)
- Pedestrian sky bridge over 99 east/west make it safer for pedestrian. Get 99 back from the state.
- It would be nice if they would upgrade all the crossing sign to bright green & even have the crosswalk light up when person is crossing.

Sidewalks

- The existing sidewalks throughout the neighborhood are in horrible condition. Only reasonable along 176th & 170th.

34th Ave S

- Need sidewalk on 34th between 175th & 176th to access light rail.

S 167th

- 167th - 31st Ave S: No sidewalks. Lots of children from apartments. Cars parking on shoulder.

S 176th

- Corner 32nd & S 176th St: Corner at this intersection is very steep when walking with cane or scooter can be very dangerous.

S 180th

- S 179th (E of Hunt Club) & 180th St takes on traffic from Google maps not updating closed gates/into out of Hunt Club Apartments.

S 188th

- S 188th St/International Blvd: Street crossing light not enough time if crossing the street using a cane or walker.

QUESTION: Bonus Question: What do you call this neighborhood?

RESPONSES:

- Connection to the world!
- Convenient!
- Home
- The Airport

12/11/2019 Community Planning Meeting #2

McMicken Heights Elementary School

Approximate Number of Attendees: 12

One Comment Card Returned with following:

Some Needs:

- Affordable housing-esp. w/in walking distance from schools
- Please help keep the immigrant small businesses in our neighborhood (Bakaro Mall). They reflect our wonderful diversity.
- Social service center/worksource office
- Incorporate local artist in public art
- Name/words/images to reflect diverse people/languages (I think of the sidewalk banners along MLK are in other languages)
- **Sidewalks** & accessibility for deaf/hard of hearing (we have these students @ Chinook MS & Tyee HS)
- Outdoor amphitheater/community gathering space (for example: Greenbridge next to Dubsea Coffee in White Center); maybe for **farmers market**
- Ride free area for public transportation
- Family/youth emergency shelter **housing**
- Another community center/space (maybe with public pool) – would be great if it had track/football field
- Food bank/food resources
- Healthy small business restaurants instead of large chains – to give SeaTac a sense of identity and community
- Community garden
- Spaces that invite people to sit & connect with one another

Content Shortcuts

Image Library

Document Central

Calendar

Pages

eNotifications

Facility Directory

My Locked Content

Awaiting My Approval

Surveys

System Variables

Forms

How do you use the City Center?

Back

Summary

Content Group is Community and Economic Development

Department is Community & Economic Development

Open since 3/28/2019

Number of Responses: 29

Channel

Website

Engagement

Form Detail

Submission Summary

Question Statistics

Individual Responses

29 responses

Date Range:

Lifetime

1. 1. Please check all boxes below that apply to you:

Answered: 25 Skipped: 4 Left Blank: 0

Live in SeaTac

18

Live within City Center boundary (see map)

5

Work in SeaTac

9

Work within City Center boundary (see map)

3

Work at the Airport

2

Own business/property within the City Center boundary

2

Visit the area

5

ANSWER CHOICES

RESPONSES

Live in SeaTac	40.91%	18
Live within City Center boundary (see map)	11.36%	5
Work in SeaTac	20.45%	9
Work within City Center boundary (see map)	6.82%	3
Work at the Airport	4.55%	2
Own business/property within the City Center boundary	4.55%	2
Visit the area	11.36%	5
TOTAL		44 (25 answered)

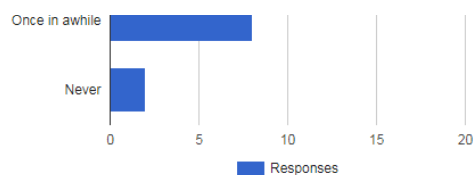
2. 2a. How often do you drive to get to a destination in the City Center? (check one)

Answered: 25 Skipped: 4 Left Blank: 0

Everyday

25

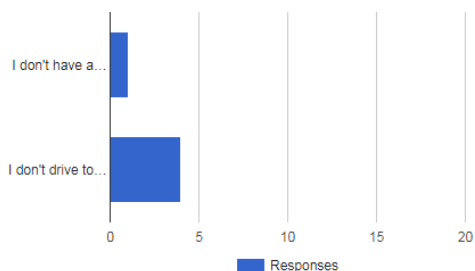
?
HELP



ANSWER CHOICES	RESPONSES	
Everyday	60.00%	15
Once in awhile	32.00%	8
Never	8.00%	2
TOTAL	25 (25 answered)	

3. 2b. If never, why?

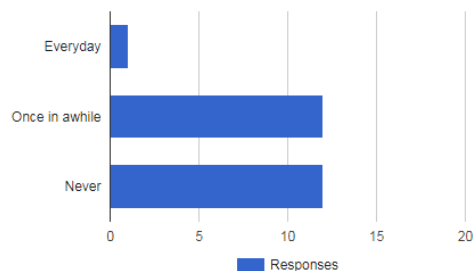
Answered: 5 Skipped: 4 Left Blank: 20



ANSWER CHOICES	RESPONSES	
I don't have a car	20.00%	1
I don't drive to the City Center	80.00%	4
TOTAL	5 (5 answered)	

4. 3a. How often do you use transit to get to a destination in the City Center? (check one)

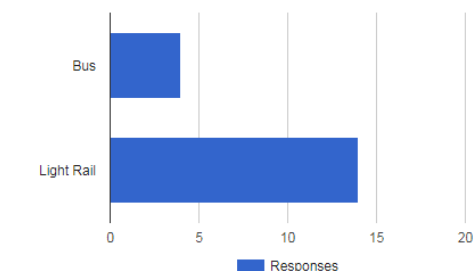
Answered: 25 Skipped: 4 Left Blank: 0



ANSWER CHOICES	RESPONSES	
Everyday	4.00%	1
Once in awhile	48.00%	12
Never	48.00%	12
TOTAL	25 (25 answered)	

5. 3b. If you do use transit, what do you use?

Answered: 16 Skipped: 4 Left Blank: 9

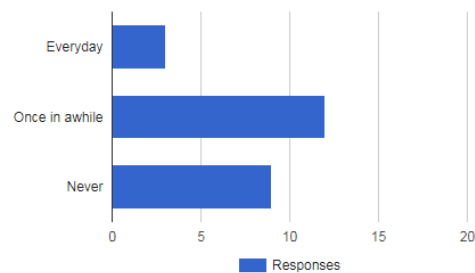


ANSWER CHOICES	RESPONSES
----------------	-----------

Bus	22.22%	4
Light Rail	77.78%	14
TOTAL		18 (16 answered)

6. 4. How often do you walk to get to a destination in the City Center? (check one)

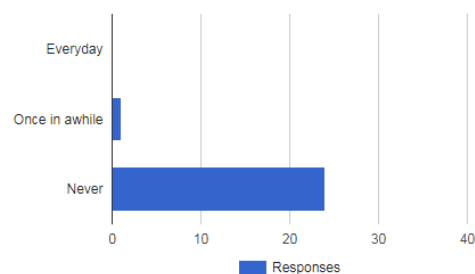
Answered: 24 Skipped: 4 Left Blank: 1



ANSWER CHOICES	RESPONSES	
Everyday	12.50%	3
Once in awhile	50.00%	12
Never	37.50%	9
TOTAL		24 (24 answered)

7. 5a. How often do you ride a bike to get to a destination in the City Center? (check one)

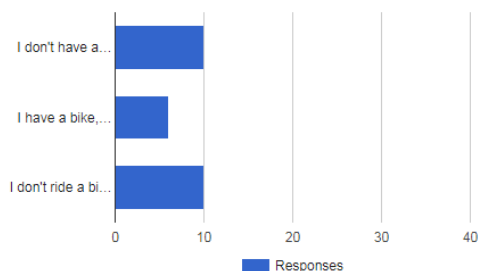
Answered: 25 Skipped: 4 Left Blank: 0



ANSWER CHOICES	RESPONSES	
Everyday	0.00%	0
Once in awhile	4.00%	1
Never	96.00%	24
TOTAL		25 (25 answered)

8. 5b. If never, why?

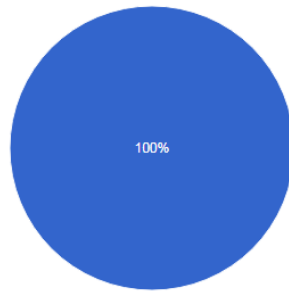
Answered: 25 Skipped: 4 Left Blank: 0



ANSWER CHOICES	RESPONSES	
I don't have a bike	38.46%	10
I have a bike, but I don't feel safe riding it	23.08%	6
I don't ride a bike in the City Center	38.46%	10
TOTAL		26 (25 answered)

9. 6. What places in the City Center do you drive, take transit, walk or bike to now?

Answered: 6 Skipped: 4 Left Blank: 19

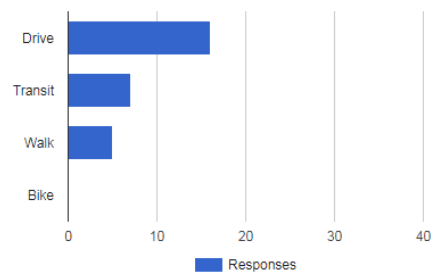


● Check here and skip to #7 if you do not go to places in the City Center. (Otherwise, check all that apply for questions #6a through #6j - for example you may check "drive" and "walk" to restaurant, etc.)

ANSWER CHOICES	RESPONSES	
Check here and skip to #7 if you do not go to places in the City Center. (Otherwise, check all that apply for questions #6a through #6j - for example you may check "drive" and "walk" to restaurant, etc.)	100.00%	6
TOTAL		6

10. ----6a. Airport?

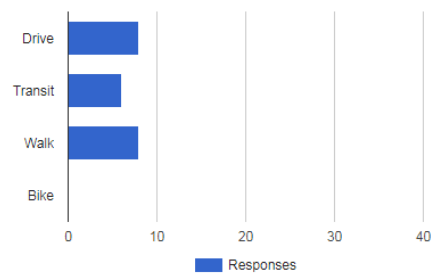
Answered: 19 Skipped: 4 Left Blank: 6



ANSWER CHOICES	RESPONSES	
Drive	57.14%	16
Transit	25.00%	7
Walk	17.86%	5
Bike	0.00%	0
TOTAL		28 (19 answered)

11. ----6b. SeaTac/Airport Light Rail Station?

Answered: 17 Skipped: 4 Left Blank: 8

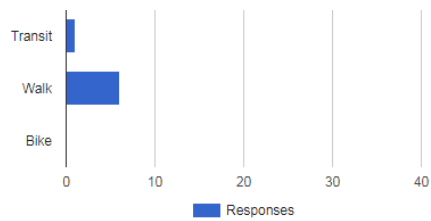


ANSWER CHOICES	RESPONSES	
Drive	36.36%	8
Transit	27.27%	6
Walk	36.36%	8
Bike	0.00%	0
TOTAL		22 (17 answered)

12. ----6c. Drop-off-area by Pedestrian Bridge on S 176th St.?

Answered: 13 Skipped: 4 Left Blank: 12

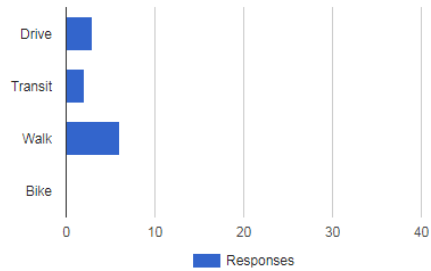




ANSWER CHOICES	RESPONSES	
Drive	56.25%	9
Transit	6.25%	1
Walk	37.50%	6
Bike	0.00%	0
TOTAL	16 (13 answered)	

13. ----6d. Bus stop?

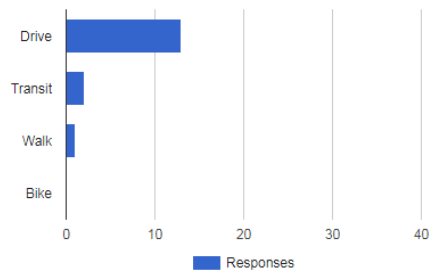
Answered: 10 Skipped: 4 Left Blank: 15



ANSWER CHOICES	RESPONSES	
Drive	27.27%	3
Transit	18.18%	2
Walk	54.55%	6
Bike	0.00%	0
TOTAL	11 (10 answered)	

14. ----6e. The place where I work?

Answered: 14 Skipped: 4 Left Blank: 11

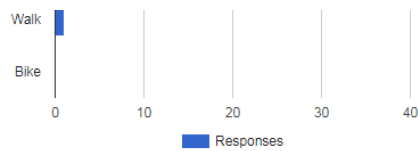


ANSWER CHOICES	RESPONSES	
Drive	81.25%	13
Transit	12.50%	2
Walk	6.25%	1
Bike	0.00%	0
TOTAL	16 (14 answered)	

15. ----6f. My appointments?

Answered: 15 Skipped: 4 Left Blank: 10

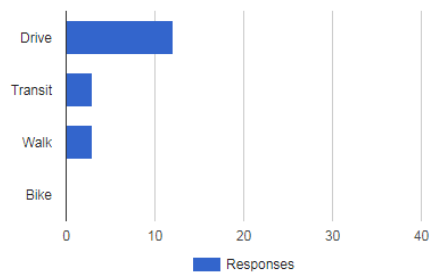




ANSWER CHOICES	RESPONSES	
Drive	82.35%	14
Transit	11.76%	2
Walk	5.88%	1
Bike	0.00%	0
TOTAL	17 (15 answered)	

16. ----6g. Friend's house?

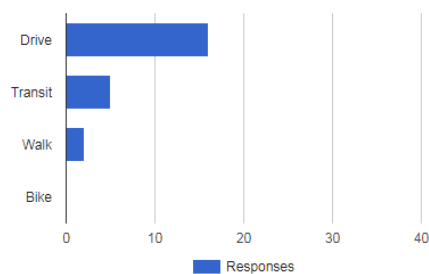
Answered: 14 Skipped: 4 Left Blank: 11



ANSWER CHOICES	RESPONSES	
Drive	66.67%	12
Transit	16.67%	3
Walk	16.67%	3
Bike	0.00%	0
TOTAL	18 (14 answered)	

17. ----6h. Restaurant?

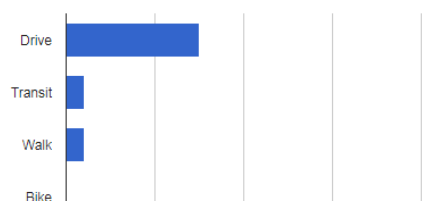
Answered: 18 Skipped: 4 Left Blank: 7

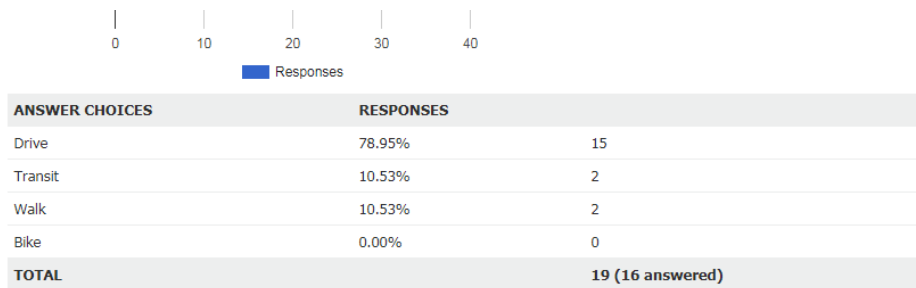


ANSWER CHOICES	RESPONSES	
Drive	69.57%	16
Transit	21.74%	5
Walk	8.70%	2
Bike	0.00%	0
TOTAL	23 (18 answered)	

18. ----6i. Store?

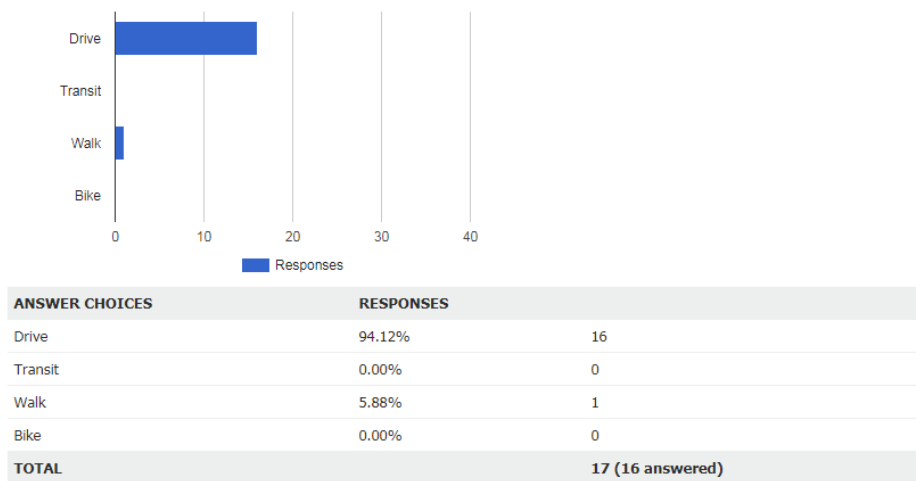
Answered: 16 Skipped: 4 Left Blank: 9





19. ----6j. Gas station?

Answered: 16 Skipped: 4 Left Blank: 9



20. 7. What improvements could be made to make it easier to get around the area?

Answered: 20 Skipped: 2 Left Blank: 7



21. 8. What kind of places are missing in the City Center area that aren't there now?

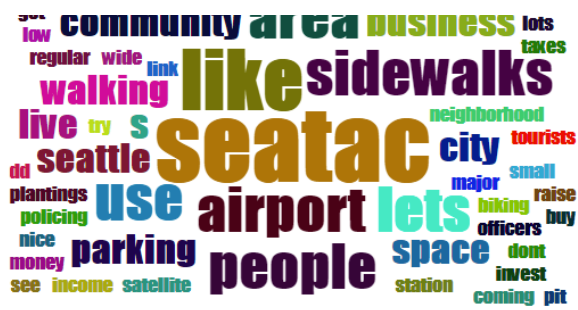
Answered: 19 Skipped: 2 Left Blank: 8



22. 9. If you had to choose one improvement in the City Center area , what would it be?

Answered: 24 Skipped: 2 Left Blank: 3





23. 10. Is there anything else you'd like the City to know about the City Center area?

Answered: 19 Skipped: 2 Left Blank: 8



Question #7:**What improvements could be made to make it easier to get around the area?****Responses:****Create a Place**

Make an actual place that would be worth walking to and around

A center of any kind to serve the community

Make it More Walking Friendly with More Destinations

The area is mostly car friendly right now and geared to travelers. It would be nice to make it more walking friendly. To have retail spaces, food markets with fresh produce, more restaurants, services that both travelers and residents would want to use.

Connectivity

Although there is very little of the city center located on the west side of IB - overhead pedestrian walkways connecting east with west may be a consideration.

Vehicle Access & Aesthetics

Vehicle access to the kiss and ride could be improved. Also, the aesthetics to the kiss and ride (beautification).

The lines painted on the roads are very faded. Freshening them up would make the place look a lot nicer, and would also help make it safer.

Street Lighting, Safety & Sidewalks

Better/more street lighting on 32nd Ave and along S 180th Street as well as a designated sidewalk in that area for pedestrians. There are a lot of people who walk that area but I hesitate at night because it is not well lit to and from my residential space out to the main business roads.

Sidewalks. Half the street in McMicken Heights have no sidewalks. I have to walk my child in the streets.

Many sidewalks are not handicap accessible & are not wide enough for tourist/airline workers w/ luggage & bikes & employees walking to work in early/late hours... no bike paths to most areas (including transit centers & airport.. ie: the curb cut from Seatac towers south toward Radisson spills out directly onto the hwy 99)

Lighting is bad in several areas, could use LED pole fixtures. Military Road by Safeway on 164th area is scary. Intersection is funky, and turns to Safeway scary when people line in middle. Safety around 7/11 on 176th is worrisome due to people who are congregating around it. Also around Safeway on 164th and 216th

Street Improvements

A lighted stop sign at the intersection of S 176th and 42nd Avenue S, similar to the one at Bow Lake Elementary School at S. 182nd and 42nd Avenue South would help to draw attention to the existing stop sign. There is an overhanging red flashing light - but an actual lighted stop sign is even more noticeable.

The street signage could improve by being larger, better lighting & easier to read before you reach the intersections. I will have to come back to this later to add which intersections I'm referring to in my comments. Also would be nice to have updated crosswalk signage, that flashes on the street when someone is going to cross like they have in white center area on 1st Ave.

Improve the light at 170th ... it gets backed up with hotel shuttles as well as the Uber/Lyft coming down the hill.

Make Getting Around Easier

Add Lime to make parking and getting to transit easier.

bike or scooter rentals

No bike lanes

Other

Teach the Uber, Lyft and cab drivers how to drive. They frequently drive below the speed limit, fail to signal, stop in the middle of the road, and disregard road signs.

Question #8:**What kind of places are missing in the City Center area that aren't there now?****Responses:**

A community center or a grocery store. There is a huge residential population in the area and there is only one nearby grocery store, Safeway, that is not even within the City Center boundary.

Let the market determine that

Cafes, restaurants. Places where people can gather that aren't in hotels. Retail stores - specifically small businesses. Produce markets - there aren't enough grocery stores in SeaTac. Some outdoors open space would be nice too, though not as high of priority.

Coffee shop, bakery

Restaurants with atmosphere (Sharps and Gregory's and maybe Mango are the only locations with any character). BREW PUBS! Hip and social gathering places for travelers and locals to mingle at... hotel bars just don't cut it.

Grocery store; post office, dry cleaner

Fitness class studios (like yoga, bootcamp, barre, etc), venues with shows/music/trivia night/etc, nicer bars/restaurants/cafes not jsut for hotel/airport ppl, museums/cultural education

Cleaned up, safer businesses

There is nothing now for people to do on their layovers. Lots of revinue being missed. Travels are taking their money to places like burien and tukwila. Lack of restaurants. Only 1 now that stays open late. No breweries. No gym. No movie theater. No nw cultural center. No park. No shopping. Just parking lots....

More restaurants and shopping, definitely shopping.

Coffee shops or community gathering spaces that do not turn in drug areas... performing arts center would be a great city asset to compliment the hotels & make Seatac a destination center itself, instead of being a parking lot for hotels/airport. Housing for the workers who need to access all these businesses & airport.

Places to eat

A center of any kind to serve the community

Question #9:**If you had to choose one improvement in the City Center area, what would it be?****Responses:**

More focus on the residents who live here than the airport as a source of commerce. More family restaurants, stores, pedestrian and other accessible forms of transportation for the locals to move about in their own city.

More trees, "cool" projects like glow in the dark bike lanes or lighting- things that help make SeaTac more of a destination or more memorable than a pit stop.

Planners to stay out of the way of business

A welcoming community space where people can gather to eat, drink, shop, play.

Vehicle and pedestrian access

Mixed Use - bottom floor commercial occupied with character, desirable restaurants, bars, pubs and entertainment and density housing above.

Better crosswalks

I live about a mile walk from the center but there's nothing to "do" there as a young adult. Would love to see something like a restaurant with shows or trivia to attend or fitness classes, or something social and inclusive/multicultural, with a SeaTac resident discount too.

Green space.

Pretty much anything other than a hotel or parking lot would improve the area.

Restaurants and walking park type like Landing area in Renton, could put parking underground

More police patrols.

cleaned up, safer business, speeding traffic

It's already build for best use, to service airport customers needs!

Raise the taxes. Lets keep it nice here. Dont try to be a low income area. Invest in infrastructure and schools. Lots of people with money are coming to places like SeaTac because Seattle is too expensive. Lets get those professional people here in SeaTac. The lightrail is a huge boon for seatac. Lets use it attract the tech workers in seattle.

Shopping

major wide sidewalks with enough room for walking, mobility scooters, regular biking, tourists/luggage, plantings & a small satellite policing station..community officers on bikes?

Sidewalks

It would link the airport and the neighborhood

Question #10:

Is there anything else you'd like the City to know about the City Center area?

Responses:

- With the growing connection to different cities by way of the light rail, The City Center is sure to expand in population. I see this as an opportunity for the City to showcase this sort of "cultural hub" that the residents create, and focus on the necessities they require to live here.
- I'd encourage more parking garages and green areas. As is, it feels pretty paved over.
- Whatever plans get decided on, please do not displace small or immigrant owned businesses. Those are the types of places we want to be in the City Center area - not big corporate hotels and parking lots. It would be so nice to attract residents and travelers alike to the beautiful diversity we have to offer in this city. There has to be balance in pandering to developers and big business and supporting working families and the "small town" feel I hear Council members say they like about our community.
- It's just hotels and the light rail stop. It would need a bakery or coffee shop to draw visitors.
- This area is definitely "company Owned" by the airport. Unless we locate housing in this area, there's very little reason currently for our residents to visit this area. If you're successful in attracting desirable restaurants, bars, pubs and entertainment facilities that would draw in locals (SeaTac, Burien, Normandy Park, Des Moines) then requiring ample short term parking should also be considered.
- I don't really consider City Center a place to go. I drive through it or go to the airport but don't consider it to have any stores/restaurants (I know there are some but they don't strike me, maybe a "taste of SeaTac" event would help introduce the community to local businesses.
- We could use a dog park and a green space to draw food trucks where you could have a nice shady place to sit in the summer.
- It is the flyover area of the city. There is nothing there to draw anyone to the area unless you are from out of town and need a room for the night, or need a place to park. With the voter approved \$15 minimum wage, there are numerous other cities to go to for entertainment and dining that are cheaper.
- This particular area is a not consistent with others city center area, because it services mainly the airport area, with all the conveniences regarding those needs! Hotels ,restaurants etc!

- If you put in low income housing its gonna bring the area down. Also dont put in too much commercial/retail. Too much will attract transients like your seeing in white center right now. mcmicken heights can become a really nice and sought after area with a little TLC.
- Yes, please do something about the light at 170th and International Blvd.
- Yes... mapping needs to clarify what is happening around the bow lake residential area...with lots of low income residents & local workers that are very worried in regard to the sale of this property turning into condo/hotels etc & losing affordable housing. Bow Lake constitutes a major portion of the 'City Center' and someone from the city needs to address how to maintain this housing.. ie: make it a mobile home zoning instead of multi housing?
- A drug store and another grocery store
- You need to think more creatively than you have before. Maybe you could make affordable space for the business that have been dislocated



City of SeaTac

City Center Urban Design Framework

City Center Stakeholder Workshop Summary
Wednesday, November 26, 2019

Stakeholders in Attendance

Name	Organization
Cathy Boysen Heiberg	Boysen & Boysen, LLC.
Larry Heiberg	Boysen & Boysen, LLC .
Perry Wall	Clarion Hotel SeaTac
Mark Hollander	Crowne Plaza Hotel
Ken Stockdale	Crowne Plaza Hotel
Wes Wood	Dollar Development
Richard Scherzinger	Hilton Hotels
Dan Watson	King County Housing Authority
Charles Bassett	L&R Group / Wally Park
Roger McCracken	Master Park
Tom Hooper	Port of Seattle
Stan Tombs	SeaTac City Council
Carl Cole	SeaTac City Manager
Clyde Hill	SeaTac Deputy Mayor
Erin Sitterley	SeaTac Mayor
Tej Basra	SeaTac Planning Commission
Katherine Kertzman	Seattle Southside Regional Tourism Authority
Mara D'Angelo	Sound Transit
Thatcher Imboden	Sound Transit
Katie Drewel	Sound Transit
Pat Callahan	Urban Renaissance Group
JoLene Parks	Urban Renaissance Group

SeaTac City Center Vision + Urban Design Framework

Workshop attendees received a presentation from the consultant team describing the outcomes of stakeholder and community engagement as well as the technical assessments of BDS (Urban Design), E.D. Hovee (Economics), and Toole Design (Transportation Infrastructure).

The consultant team identified two distinct sub areas within the City Center area of study—one focused on residential and another on more intensive commercial uses. The accompanying map describes the general boundaries of these sub-areas. The consultant team then presented a draft vision and principles for the district which was referred to as “SeaTac Landing” by the consulting team.

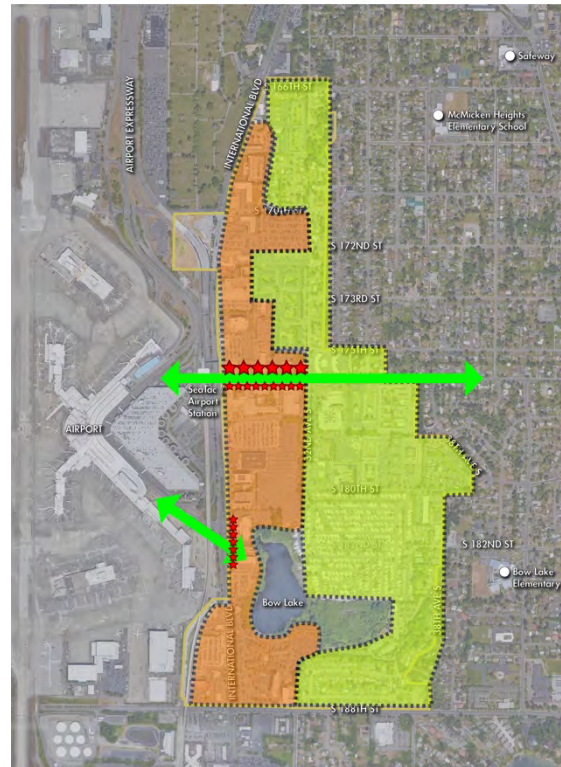
Vision

The following draft vision statement was written by the consultant team as a possible future for the airport adjacent district (being referred to for discussion purposes as “SeaTac Landing”) that would satisfy residents, workers, and property owners alike:

The global gateway to the Pacific Northwest; SeaTac Landing is an active hub providing workers, visitors, and residents alike with a diverse set of experiences in an enticing, contemporary, and walkable urban district.

On the whole, workshop stakeholders were very supportive of this high-level vision for the district. Most spoke explicitly in support of the vision; several offered specific comments or feedback:

- The district will need a new mix of amenities to support this vision
- A “hub” is good—SeaTac Landing should be a place to “stay, work, play”
- Like the words “diverse” and “enticing”
- The sub-areas make sense – commercial + residential
- Like the word “landing” – explicit nod to the airport, but also an acknowledgement that we want people to “come and stay.” Some were concerned about conflict with the existing “Landings” in Renton and Federal Way.



Principles

To support the consensus vision, the consulting team offered several principles that should help to guide Phase 2 planning for the district (being referred to in the meeting as “SeaTac Landing”).

These principles as presented were:

- **Economic Prosperity.**
Prosperity for all is achieved through improved land value, more diverse employment opportunities, and increased tax revenue.
- **Attractive Public Realm.**
The comfort, quality, and programming of streets and public spaces entices people to come out and linger in the district.
- **Mix of Complementary Uses.**
Development supports a mix of office, lodging, and airport service uses that are mutually supportive of one another.
- **Efficient Circulation.**
Access to and between major activity centers limits congestion and maximizes mobility for all modes, including air.



Again, workshop stakeholder feedback was almost uniformly positive and supportive of the principles presented. There were several suggestions for the project team to consider with respect to the principles, these were:

- We should emphasize “comfort” in the district, perhaps in the public realm principle.
- In the complementary uses principle, we should emphasize that what we desire are “complementary and connected” uses that “encourage a sense of place.”
- The economic prosperity principle should have an even more explicit reference to economic inclusiveness, across the income spectrum.
- Somewhere in the principles, we might consider saying something about “leveraging the fastest growing airport in North America.”

Stakeholder Priority Outcomes (by theme):

Having achieved consensus around the high level vision and principles for “SeaTac Landing,” workshop attendees broke into small groups to offer their specific ideas about necessary priority outcomes (in Urban Design, Transportation, Economic Development, and Implementation) that would be necessary in the next five years in order to make collective progress on achieving the Vision. A shorthand summary of the input provided has been consolidated and summarized below.

Economic Development/Implementation

- Better access & Connectivity to Airport
- Multi-Family development with retail
- Promote mixed-use with hotel/commercial/residential
- Regional Tourism Authority can be initial convener
- Coordinated and intentional focus on district; capitalize on momentum
- Need a stand-alone entity and governance structure to focus on implementation
- Conduct a ULI Panel
- Organize Business Interests
- Real Estate fundamentals
- Being ready for major office development
- Need incentives (i.e. connectivity to airport)
- Connectivity to light rail (for office)
- Affordable transportation options are a strength
- We need a unique draw, so we are not following Seattle & Bellevue
- Office & placemaking together

- Strike balance of opportunity and affordability
- Business community as organized - message to partner with City

Urban Design/Transportation

- Identity & Urban Feel
- Pedestrian weather protection
- Better pedestrian access to airport (new bridges); Need better two-way connection.
- Continuity between district and airport
- Safety and cleanliness of sidewalks (hire ambassadors)
- Need a 24/7 bridge to airport
- Improve District image to visitors
- Ease flow of vehicles to improve safety
- Better pedestrian-oriented lighting
- Expedite City approval process for public realm improvements
- More centrally located shuttle near light rail
- Safety, walkable environment



City Center Stakeholder Workshop Summary

- “International Village” – small business incubator; food + cultural activities
- Elevated bridge connection to airport (but don’t hurt ground floor uses)
- Activate public space with cultural events
- Pet boarding – drives activity
- Wine + local food – “Taste of SeaTac”

SEATAC CITY CENTER VISION + URBAN DESIGN FRAMEWORK Nov 26, 2019

VISION

- NEED THE AMENITIES TO SUPPORT!
- STAY, WORK, + PLAY
- DIVERSE + ENTICING!
- LIKE SUB-AREAS COMMERCIAL + RESIDENTIAL
- LANDING! WANT PEOPLE TO STAY

PRINCIPLES

- > EMPHASIZE COMFORT
- > “COMPLEMENTARY + CONNECTED USES THAT ENCOURAGE A SENSE OF PLACE”
- > ECONOMIC INCLUSIVENESS (ACROSS INCOMES)
- > LEVERAGE FASTEST GROWING AIRPORT IN NORTH AMERICA

STAKEHOLDER OBSERVATION

- MOVE TOURISM OFFICE CLOSER TO AIRPORT ON 176TH
- EASIER TWO-WAY MOVEMENT BETWEEN DISTRICT + AIRPORT
- KEEP PEOPLE IN THE DISTRICT! (WORK, SHOP, REST, PLAY, ETC.)
- PROPERTY OWNERS WORKING TOGETHER TO IMPROVE DISTRICT AS DESTINATION
- EXTEND DISTRICT INTO THE AIRPORT BLUR THE LINE/BOUNDARY (TICKETING, IN HOTELS)
- MORE PUBLIC + PRIVATE OFFICE ALONG INTO BLVD
- TO SUPPORT NEW OFFICE → BETTER PUBLIC REPAIR

ECONOMIC DEVELOPMENT / IMPLEMENTATION

- > ACCESS & CONNECTIVITY TO AIRPORT - ABOVE GROUND?
- > WALKABILITY
- > IDENTITY & URBAN FEEL "SEATAC LANDING" [CONFLICT w/ "THE LANDING" by Downtown or Federal Way]
- > MULTI-FAMILY DEVELOPMENT w/ RETAIL
- > FOLKS GET ON LIGHT RAIL FOR EXPERIENCES
- > MIXED USE w/ HOTEL / COMMERCIAL / RESIDENTIAL
- > REGIONAL TOURISM AUTHORITY AS CONVENOR
- > COORDINATED FOCUS ON DISTRICT
- > INTENTIONAL
- > ENTITY & GOVERNANCE STRUCTURE
- > ULI PANEL?
- > ORGANIZE BUSINESS INTERESTS
- > REAL ESTATE FUNDAMENTALS
- > MOMENTUM
- > BEING READY FOR MAJOR OFFICE DEVELOPMENT
- > NEED INCENTIVES (i.e. connectivity to airport)
(RESTAURANT PARKING RIGHTS ARE A BARRIER)
- > CONNECTIVITY TO LIGHT RAIL (for OFFICE)

- > AFFORDABLE & TRANSPORTATION OPTIONS ARE STRENGTHS
- > WE NEED A DRAW SO WE'RE NOT FOLLOWING SEATTLE & BELLEVUE
- > OFFICE & PLACEMAKING TOGETHER
- > IMAGE
- > BALANCE OF OPPORTUNITY & AFFORDABILITY
- > BUSINESS COMMUNITY AS ORGANIZED
MESSAGE TO PARTNER w/ CITY

URBAN DESIGN / TRANSPORTATION

- PEDESTRIAN WEATHER PROTECTION
- BETTER PEDESTRIAN ACCESS TO AIRPORT
(NEW BRIDGES!)
- CONTINUITY BETWEEN DISTRICT AND AIRPORT
- SAFETY + CLEANLINESS OF SIDEWALKS (AMBASSADORS)
- 24/7 BRIDGE
- EASE FLOW OF VEHICLES TO IMPROVE SAFETY
- LIGHTING (
- EXPEDITE CITY APPROVAL PROCESS FOR PUBLIC REALM IMPROVEMENTS

- > MORE CENTRALLY LOCATED SHUTTLE NEAR LIGHT RAIL
- > SAFETY, WALKABLE ENVIRONMENT
- > "INTERNATIONAL VILLAGE" ^{small BIZ INCUBATOR}
FOOD + CULTURAL ACTIVITIES
- > ELEVATED BRIDGE CONNECTION TO AIRPORT (BUT DON'T HURT GROUND FLOOR USES)
- > ACTIVATE PUBLIC SPACE w/ CULTURAL EVENTS
- > PET BOARDING → DRIVES ACTIVITY
- > WINE + LOCAL FOOD "TASTE OF SEATAC"

To: Department of Community and Economic Development, City of SeaTac

From: BDS Planning & Urban Design

Re: Summary of Stakeholder Engagement for SeaTac City Center Visioning

Date: November 8, 2019

Introduction

To support the development of a vision and urban design framework for SeaTac City Center, BDS Planning & Urban Design engaged a cross-section of City Center stakeholders to better understand their current perspectives and priorities for the district. This memo summarizes the input received by the consultants during this engagement process.

Between July and November, 2019, BDS Planning engaged City Center residents, workers, property owners, and other stakeholders in a variety of formats, including: one-on-one interviews (in-person and phone); on-site focus groups; and a public Open House meeting at McMicken Elementary School. These consultant-led engagement efforts have been augmented by City-led engagement with Tyee High School students; an online questionnaire; and briefings for City Commissions (Planning and Hotel/Motel).

Interviews

To get a candid assessment of City Center's current strengths and weaknesses, and future opportunities, BDS Planning interviewed more than 15 stakeholders who own property, operate businesses, or have other interest in City Center. While the content of these individual interviews is confidential, some key themes emerged from the group overall:

- Generate **Tax Revenue** (Sales & Land Value)
- Limit **Congestion & Maximize Mobility** (all modes, including air)
- Reflect **Airport to the West & Neighborhood to the East**
- Support local **food** opportunities both in **shopping & enterprise** for Workers & Residents
- Support **Housing Affordability** for Workers and Residents
- Protect **Adaptability** to Future Technology (e.g. Autonomous Vehicles)

Vision concepts most universally supported by the stakeholders interviewed included a Seattle "**South End Office and Employment Center**," emphasizing an emerging Class A office cluster or "**Aerotropolis**," a district whose future development intentionally leverages proximity to the airport as an organizing principle.

Focus Groups / Open House

Across all community engagement groups several **themes** and **areas of consensus** emerged:

- **Identity.** The term “City Center” does not resonate with the vast majority of people who live or work in the district; in fact, there is very little sense of a cohesive neighborhood *across* individual property developments.
- **Access.** People overwhelmingly value the proximity to transportation resources (bus, light rail, and airport); but desire improvements to pedestrian experience to access them (i.e. more sidewalks, crosswalks & pedestrian enhancements; especially along the Int’l Blvd and 32nd Ave S).
- **Lighting.** The darkness of much of the district after sunset is contributing to a public safety concern and preventing many community members from choosing to spend time outside without a vehicle.
- **Affordability.** The naturally occurring affordability of the area is a matter of critical concern to residents; displacement is one of the top concerns.
- **Pride.** Enhancements to the look and feel of highly public areas where residents and travelers overlap (especially along major thoroughfares like S 188th St., S 176th St., and the Int’l Blvd) would be welcomed source of pride for the district.

The following maps show responses from all community engagement activities consolidated together.

Where could **sidewalks** be added or improved to make walking easier?



Where would you like to be able to **eat**?

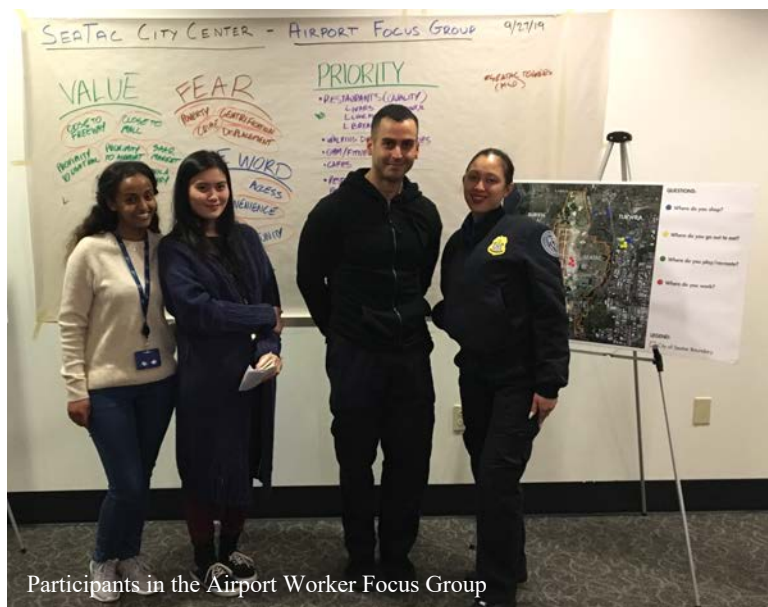


Where would you like to be able to **shop** (retail/convenience)?



The following sections report on input from each of the individual engagement activities in more detail.

Airport Workers

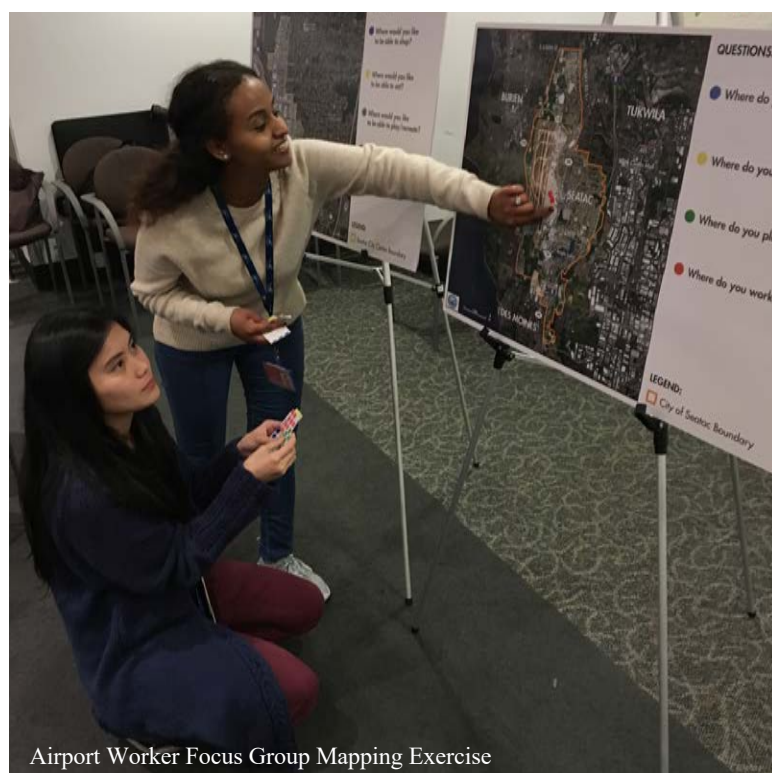


Participants in the Airport Worker Focus Group

A focus group of individuals who work at SeaTac Airport was convened at the airport on September 27th. Participants ranged from recently hired to longer-term employees. Participants were asked to share their perspectives about what they and their co-workers personally value about the City Center area, their fears for the district, and their top priorities for its improvement.

With respect to participants' most valued aspects of City Center, conversation centered around two main topics: 1) **proximity to major transportation** (freeways, light rail, and airport); and 2) **access to cultural, food, and educational assets** just north on Highway 99 in Tukwila (such as Saars Market and the Tukwila Library).

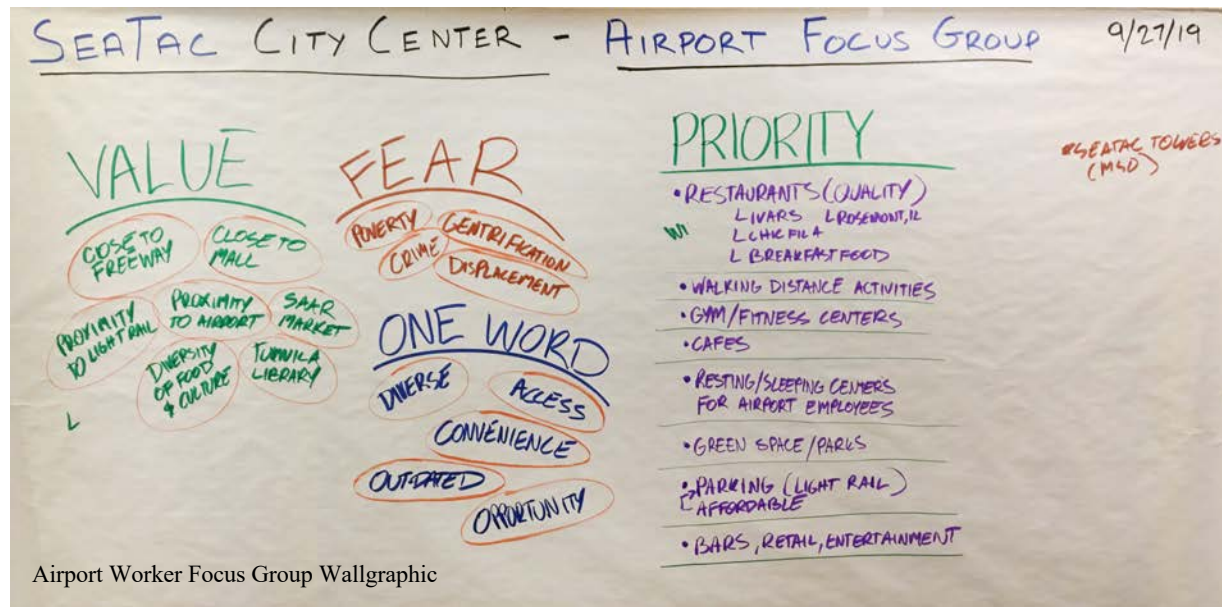
Conversely, airport workers' greatest fears for the district mostly had to do with the twin concerns of **displacement** and **gentrification** on one hand and **poverty** and **crime** on the other. Participants agreed that the look and feel of the City Center area was "outdated" and not commensurate with what first time visitors arriving from out of state typically expect of this



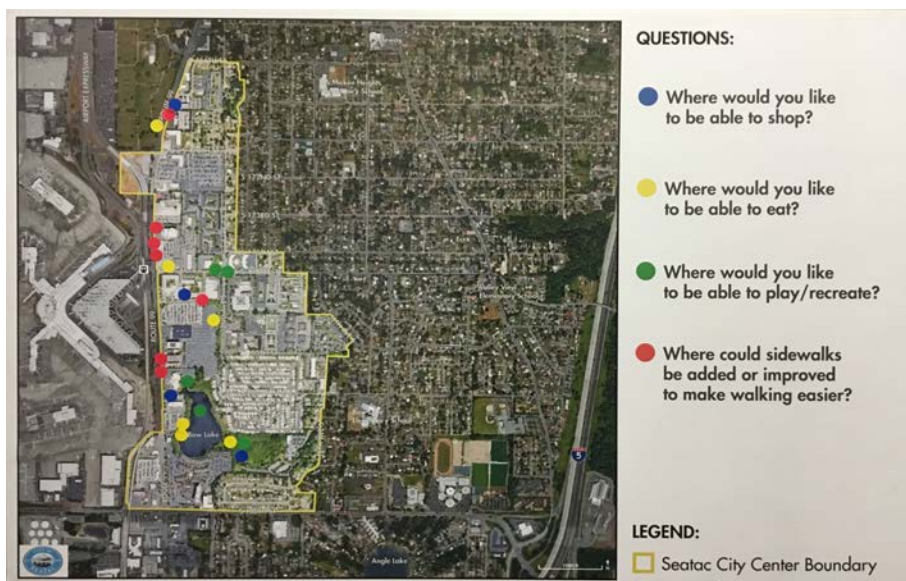
Airport Worker Focus Group Mapping Exercise

major metropolitan area.

Citing its incredible access to transportation and regional retail, participants described City Center in a single word as “**opportunity**.” One participant cited the transformation of Rosemont, IL, next to O’Hare airport, as an example of a mixed-use, airport-serving entertainment district with corporate facilities and office workers.



Top priorities expressed by this group focused primarily around activities they would like to be able to **walk to before, after, or between shifts** at their airport jobs. These included: quality **chain cafés and restaurants** (Ivar’s, Chick-fil-A, etc.), **gyms or fitness centers**, as well as **bars, retail**, or other forms of entertainment. Participants also expressed a desire for certain things at the airport itself, such as more affordable em-



ployee parking and secure places to sleep. An interactive mapping exercise revealed that airport workers primarily would like to see pedestrian improvements along Highway 99. It also suggests that participants see 176th Street and Bow Lake as potentially desirable places to play, shop, and eat.

Windsor Heights

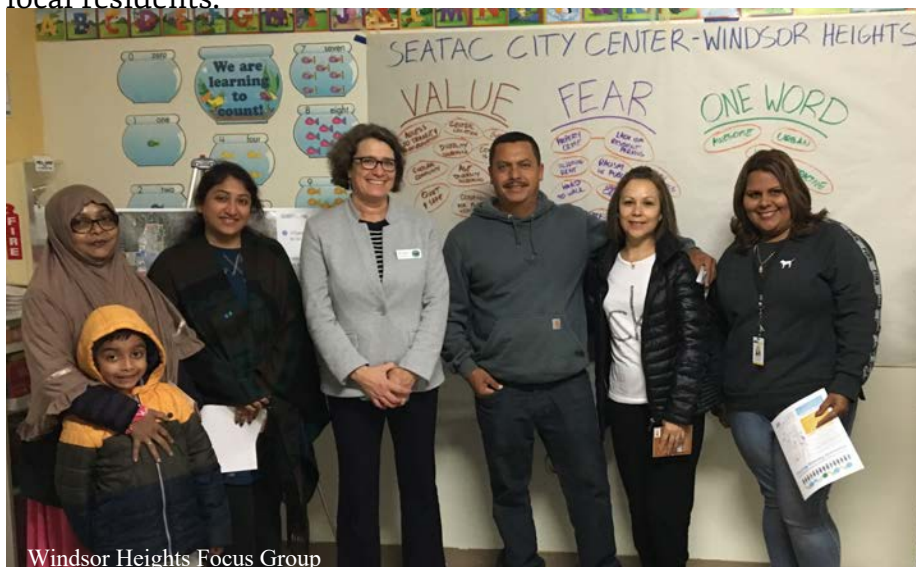
The first of two resident-oriented focus groups in City Center was held with residents at the Windsor Heights apartment complex on October 9. The group ranged in age from young people, to young families, to parents with adult children. Tenure of residence in City Center was similarly diverse, ranging from five years to over 20.

Asked about elements of City Center they most valued today answers fell primarily into two themes: 1) Proximity and ease of **access to transportation** resources and 2) an increasingly diverse (with respect to ethnicity and age) **cultural community** in the district.

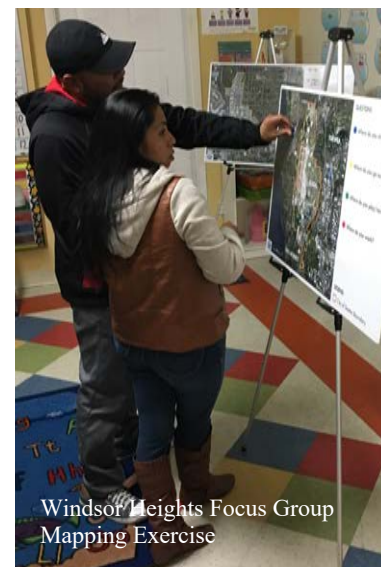
Conversely, when asked about fears for City Center, focus group participants cited a perception of increased **property crime and theft**, increasing rent, lack of consistently available **parking**, and difficulty of walking due to **poor or absent sidewalks**. More than one participant expressed the parking issue in terms of economics and personal safety, explaining that the need to park far from home resulted in lost time searching for parking many blocks away and then needing to walk 15 or 20 minutes back to their home, often in the dark and without consistent sidewalks.

One focus group participant cited a stark fear of more open, brazen, and even violent **racism** in the district. This same individual described a recent incident in which their middle-aged domestic partner and father of two was physically assaulted right outside of their home, apparently for no other reason than because of the partner's ethnic identity. Police responded, but the perpetrator was never apprehended.

Focus Group participants top priorities for improving City Center are deeply informed by these values and fears. Some expressed a desire for **more diverse food options** (i.e. Halal) like the Saar's Market in Tukwila. Others were most concerned with the improvement of their personal safety through **better sidewalk infrastructure** and **more well-lit streets** and public spaces. Several participants described their priority as improvements to Highway 99 to make the area more **beautiful** and a **source of pride** for local residents.



Windsor Heights Focus Group



Windsor Heights Focus Group
Mapping Exercise

Bow Lake

A large facilitated discussion and listening session was held at the Bow Lake clubhouse on November 5 at the Home Owner Association's regular meeting. Over 40 Bow Lake residents participated in the visioning exercise, providing their values, fears, priorities, and a one-word description of SeaTac City Center.



Bow Lake Facilitated Discussion

Participants most valued **access to amenities and transportation, diversity of development types/uses**, and the **walking proximity to services** within SeaTac City Center. Bow Lake residents feared the **loss of their home** and **displacement** from new development; **violent crime** and gang activity; **negative impacts** from the constant flow of **travelers**; and accuracy of information from city plans and staff.

Participants were provided with sticky notes to provide their priorities in a more comfortable setting. Priorities centered around the development of **pedestrian oriented infrastructure** including more **sidewalks and lighting**; keeping Bow Lake **affordable** and avoiding re-zoning/displacement; and **community-centric development on S 188th & Pacific Hwy S**.

When asked to describe SeaTac city center in one word, participants used “disjointed”, “cars”, “traffic”, “parking”, “confusion”, “congestion”, “developing”, and “overbuilt”. The overall theme of this exercise highlights the **auto-centric nature** of the built environment in City Center.

Participants were asked to interact with the City Center map by placing geographically specific color-coded stickers. Bow Lake residents wanted to shop along Pacific Hwy S, on S 188th St, and eat around S 188th and 38th Ave. They wanted sidewalk improvements along 38th Ave S, 32nd Ave S, and the Bow Lake Elementary School.

Open House

A community Open House was held at McMicken Heights Elementary School on October 23. Participants were asked to provide their values, fears, priorities, and a one-word description of the City Center. They were also able to provide feedback through the interactive mapping exercise, and city-led mapping stations focused on vehicular and pedestrian constraints and opportunities.

Participants most valued aspects surrounding City Center converged amongst four themes: 1) **Access to transit/light rail**; 2) An **inviting environment** for travelers and visitors; 3) A variety of **shopping opportunities**; and 4) a focus on **community** and its residents.

Conversely, participants feared **displacement of residents and businesses** due to zoning changes that would allow more airport centric services like parking. Participants also highlighted **rising crime**, an increase in **traffic congestion**, and more **noise** associated with the airport.

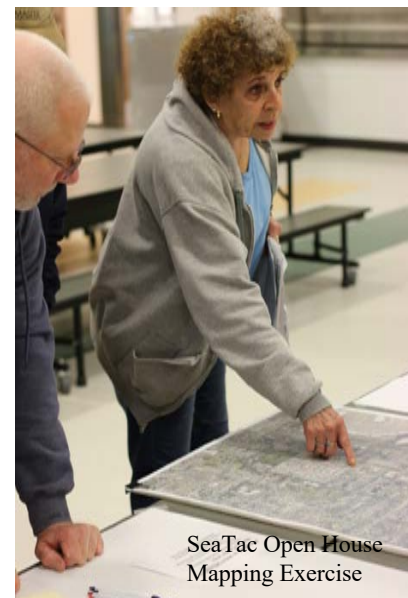
Top priorities for participants included **balancing the needs of both residents and visitors**. This included a focus on the development of the airport industry, convenience for both tourists and those living in SeaTac, as well as building upon a **welcoming attractive place** that reflects its **diverse population**. Participants also prioritized multi-purpose trails for **biking and walking**, **family-oriented shops**, and the **preservation** of senior living facilities like Bow Lake.

Participants used the words “under-developed”, “incohesive”, and “multi-cultural” in the one-word engagement exercise.

The interactive mapping exercise revealed that most participants shop in four nodes including Burien, Southwest Renton, South Center Mall, and North SeaTac along S 160th St/Pacific Hwy S.

Participants frequented the businesses along Pacific Hwy S, in Des Moines, and Burien. They recreated at Angle Lake Park and along the Puget Sound north of Des Moines. Some Participants worked within SeaTac, while the majority worked between Tukwila and Renton.

When participants were asked to identify where they “would like to be able to” shop and eat, they focused activity around the intersection of S 176th St./Pacific Hwy S, stretching east along S 176th St. Other areas included S 170th St./Pacific Hwy S and S 188th St./Pacific Hwy S. Participants wanted more recreational opportunities Southeast of Bow Lake, and improvements in side-walks throughout the City Center subarea.





SeaTac Open House Mapping Exercise



SeaTac Open House Mapping Exercise



SeaTac Open House Engagement



SeaTac Open House Interactive Wallgraphic

