Pike Place Market
PDA Council Kick Off
3.30.2023
Introduction
Master Plan timeline: PDA meetings by phase

- **March**: Kickoff
- **May**: Eco-Charrette
- **June**: Opportunities, Constraints & DEI
- **October**: Scenarios
- **December**: Draft Master Plan

**2023**
- Assessment
- Stakeholder Engagement

**2024**
- Scenario Development
- Master Plan
Outreach plan

- Communication Plan
  - Open House | Community Survey
  - Stakeholder Interviews
  - Discussion Groups
  - Presentations

Pike Place Master Plan
Report Back & Celebration
Today’s agenda: discuss context, goals 1-3, and case studies of how other markets have navigated similar circumstances

- **PPM’s Changing Context**: Urban Fabric and Retail Trends
  - **Case Study**: Reading Terminal Market, Philadelphia
- **Goal #1**: PPM’s Multiple Identities + DEI
- **Goal #2**: Preservation and Enhancement of Physical Plant
  - **Case Study**: Borough Market, London
  - **Group Discussion #1**
- **Goal #3**: Local Visitation
  - **Group Discussion #2**
Master Plan goals

**Goal #1:** Celebrate the multiple identities and authentic character that are essential to PPM, fulfill its social impact as the “Soul of the City,” and continue to embrace principles of greater diversity, equity, and inclusion (DEI).

**Goal #2:** Preserve the physical plant while improving operations, enhancing visitor experience, and embracing environmental sustainability.

**Goal #3:** Reorient PPM to a local audience with a business model that makes PPM a place for people who live and work in Seattle to shop and gather. Ensure a “seat at the table” on relevant local policy issues.

**Goal #4:** Build PPM’s financial strength.

**Goal #5:** Ensure PDA governance structure supports implementation.
City markets face 5 major dynamics that drive their definition and focus over time.
Changing Context

Urban Fabric and Retail Trends
FUTURE CHANGES
Growth of e-commerce: U.S. online retail sales (2000-'21, $B)

U.S. Online Retail Sales in Billions (2000-2021)

Total online retail sales
Online retail sales as share of total sales

Source: US Census Bureau
As the importance of online retail has grown, the composition of brick and mortar retail has changed (2015-2019).

-3% decrease in retail occupations in U.S. (e.g., store clerks)

+7% increase in food & beverage occupations in U.S. (e.g., servers and line cooks)

Source: US Census Bureau
Changing Context

Case Study: Reading Terminal Market
Reading Terminal Market, Philadelphia

Reading Terminal Market’s 130-year history mirrors that of Pike Place Market in the contextual transformations that have challenged and shaped the market.
Reading Terminal Market grid
### Reading Terminal Market: six major contextual shifts

<table>
<thead>
<tr>
<th>1893</th>
<th>~1915-'20</th>
<th>1950s</th>
<th>1960-'76</th>
<th>1980s</th>
<th>1980-'91</th>
<th>Today</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICONIC TERMINAL</td>
<td>WWI RESPONSE</td>
<td>DEMAND &amp; DIVERSIFICATION</td>
<td>RR BANKRUPTCY</td>
<td>MARKET EAST REVITALIZATION</td>
<td>CONVENTION CENTER INTEGRATION</td>
<td>PRE- AND POST-COVID</td>
</tr>
</tbody>
</table>

**Brand showplace**
- Community food source
- Local, national delivery
- Maintenance, management challenges
- Market value questioned
- “Save the market” campaign
- Pandemic impacts
Reading Terminal Market: convention and hotel integration
Reading Terminal Market: vertical integration and creation of grand hall

Convention Map
Reading Terminal: lessons learned

**Context:**
Addressed threat of Market East redevelopment program and Convention Center development by becoming integral to both initiatives

**Role:**
Added role as event venue with redesign of linked Train Terminal Shed as pre-function space and ballroom

**Patron Mix:**
Added event and convention patrons to its local and tourism visitor base
Master Plan Goal 1

PPM’s Multiple Identities + DEI
1. Celebrate the multiple identities and authentic character that are essential to PPM, fulfill its social impact as the "Soul of the City," and continue to embrace principles of greater diversity, equity, and inclusion (DEI).
PPM as...

CITY MARKET

FOOD EMPORIUM

PLACE TO LIVE

BUSINESS INCUBATOR

DESTINATION ATTRACTION

MISSION-BASED INSTITUTION

PROGRAMMABLE VENUE

MEET THE PRODUCER
Considering Diversity, Equity, and Inclusion

**Diversity** is the presence, activity, and power of all individuals, collective identities, and differences (e.g., race, ethnicity, gender, disability, sexual orientation, etc.).

**Equity** is fair treatment, equality of opportunity, and fairness in access to information and resources for all.

**Inclusion** is a culture of belonging by actively inviting the contribution and participation of all people.
Consider PPM DEI across:

- VISITORS
- VENDORS
- GOVERNANCE
Master Plan Goal 2
Preservation + Enhancement of Physical Plant
2. Preserve the physical plant while improving operations, enhancing visitor experience, and embracing environmental sustainability.
14 levels
4 open to the street
2 ½ blocks wide

LEGEND

LIVINGSTON/BAKER BUILDING
SOAMES/DUNN BUILDING
STEWART HOUSE
NORTH ARCADE
PUBLIC MARKET PARKING GARAGE
TRIANGLE MARKET
FIRST AND PINE BUILDING
SANITARY MARKET
FAIRLEY BUILDING
LELAND BUILDING
CORNER MARKET
LASALLE BUILDING
ECONOMY MARKET
MARKETFRONT
Upper Levels
1st Ave
Pike Place
Economy Atrium
Post Alley
Mezzanine Level
DownUnder Level 4
DownUnder Level 3
DownUnder Level 2
Western Ave
Market buildings Age

LEGEND
- LIVINGSTON/BAKER BUILDING
- SOAMES/DUNN BUILDING
- STEWART HOUSE
- NORTH ARCADE
- PUBLIC MARKET PARKING GARAGE
- TRIPLE MARKET
- FIRST AND PINE BUILDING
- SANITARY MARKET
- FAIRLEY BUILDING
- LELAND BUILDING
- CORNER MARKET
- LASALLE BUILDING
- ECONOMY MARKET
- MARKETFRONT

1901
1922
1918
1904
1909
1901
1908
1908
1989
1910
1942
1983
Market buildings
Most recent renovation
Opportunities for programming
Potential approaches to reinvestment:

- Cost-efficiently conserve energy given high energy costs and constraints on central plant
- Allocate scarce capital dollars to high use features of the Market:
  - Elevators
  - Flooring
  - Wood windows
  - Historical features
  - Overall street condition*
    - *under city’s jurisdiction
  - Other Costs
Master Plan Goal 1
PPM’s Multiple Identities

Master Plan Goal 2
Preservation + Enhancement of Physical Plant

Case Study: Borough Market
Borough Market: 6 pillars address mixed roles and mission challenges

- Iconic landmark & place maker
- Distinctiveness of curated offering mix
- Sustainability beacon for food production
- Short supply chain innovator
- Community hub for traders, producers, residents, and visitors
- Point of local & global connection through food experiences
Borough Market: maintaining iconic character through modernization projects
Borough Market: post-Covid + Brexit challenges to the 6 pillars

- The impact of Brexit on food procurement
- Post Covid restrictions
- New UK immigration rules and labor issues
- Visitor free fall
- Absence of congregate performance metrics
- Digital trading and shift to on-line demand
- Shift to local demand
- District development as mixed-use destination
**Borough Market: redefining the roles of the market**

<table>
<thead>
<tr>
<th>Role</th>
<th>Benefit</th>
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<tbody>
<tr>
<td>Iconic Landmark &amp; place maker</td>
<td>Status leveraged as brand identity for mixed use district</td>
</tr>
<tr>
<td>Distinctiveness of curated offering mix</td>
<td>Localization of the offering mix</td>
</tr>
<tr>
<td>Sustainability beacon for food production</td>
<td>Sustainability beacon for regional food production</td>
</tr>
<tr>
<td>Short supply chain innovator</td>
<td>Enterprise incubator</td>
</tr>
<tr>
<td>Community hub for traders, producers, residents, and visitors</td>
<td>Community hub for traders, producers, makers, and residents</td>
</tr>
<tr>
<td>Point of local &amp; global connection through food experiences</td>
<td>Place of local connection through food experiences</td>
</tr>
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</table>
Borough Market: lessons learned

**Role Redefinition:**
Addressing structural changes caused by Brexit and impact of Covid by re-orienting the Market toward local market segments.

**Context:**
Building expanded appeal by acting as center point of a larger mixed-use district.

**Maintaining Uniqueness:**
Directing continued modernization efforts while maintaining historic integrity of the Market as landmark and icon.
Conversation 1
What parts of the Market – including both places and offerings – are core to its identity? Why?
What would a more diverse, equitable, and inclusive Market look like?

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**Equity** is fair treatment, equality of opportunity, and fairness in access to information and resources for all.

**Inclusion** is a culture of belonging by actively inviting the contribution and participation of all people.
Master Plan Goal 3
Visitation - Local Audience Balancing
Tourism
3. Reorient PPM to a local audience with a business model that makes PPM a place for people who live and work in Seattle to shop and gather. Ensure a "seat at the table" on relevant local policy issues.
Nooks & Crannies

1. POST ALLEY
2. GUM WALL
3. OUTDOOR SEATING/DINING
4. SANITARY INTERIOR SPACE
5. SOAMES/DUNN COURTYARD
6. MARKETFRONT PASSAGE
Wander Path

1. WESTERN SHOPS
2. WESTERN AVE
3. MARKETFRONT SEATING
4. STARBUCKS
5. DOWNUNDER
6. POST ALLEY DINING

[Map showing the routes and locations mentioned above]
Who is coming to the market and who is missing?

7.3 MILLION VISITORS (2021)
Conversation 2
Who is coming to the Market, and who isn't?

If not here, where are BIPOC Seattleites going?
Today:
What is your favorite thing about the Market right now?

10 years from now:
Your friend – who is a Seattleite – asks, "I have limited time to visit the Market. What should I see?"
Conclusion
What We Heard