

Pike Place Market PDA Council Kick Off

3.30.2023



Introduction

Master Plan timeline: PDA meetings by phase



Outreach plan

FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB



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).

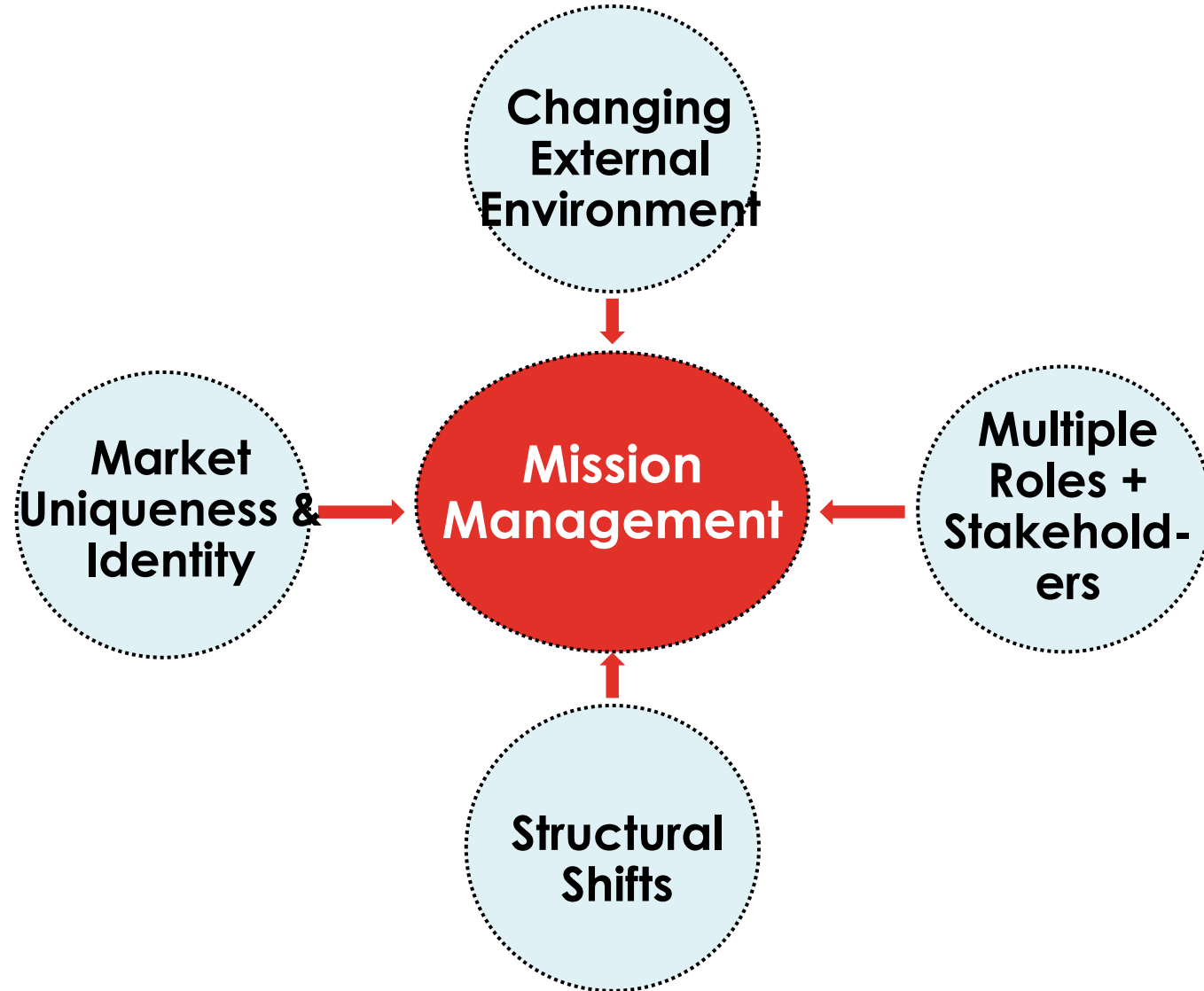
Goal #2: Preserve the physical plant while improving operations, enhancing visitor experience, and embracing environmental sustainability.

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.

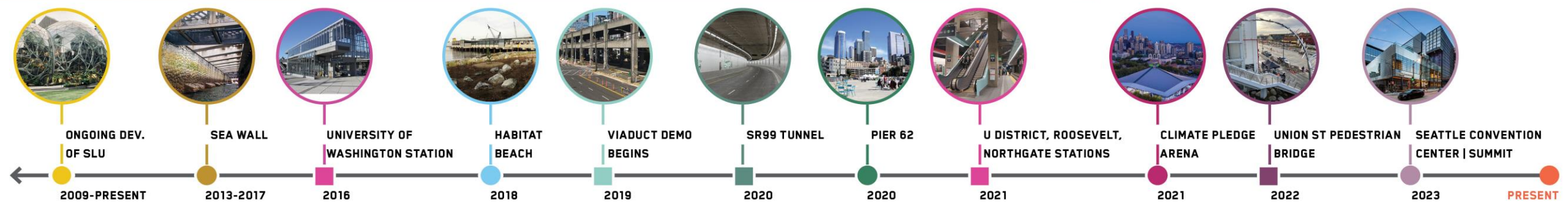


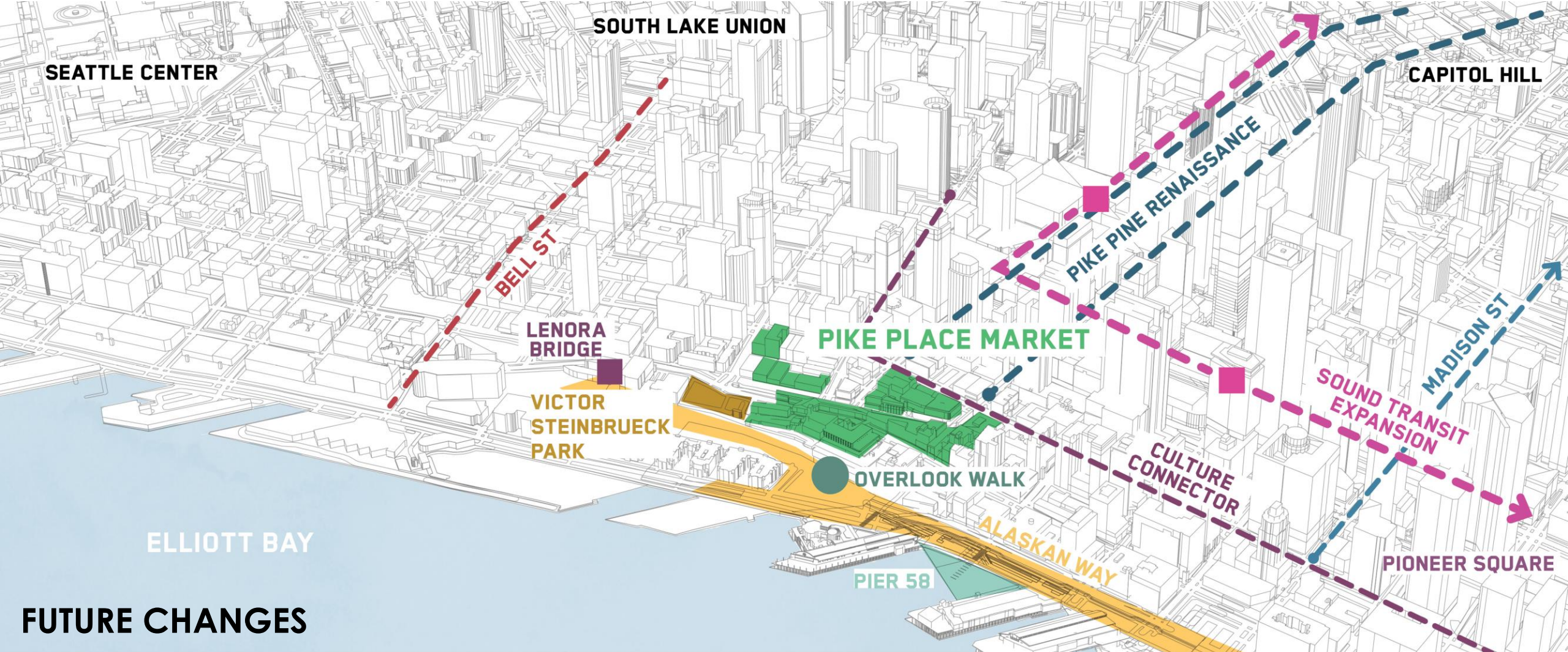
Changing Context

Urban Fabric and Retail Trends



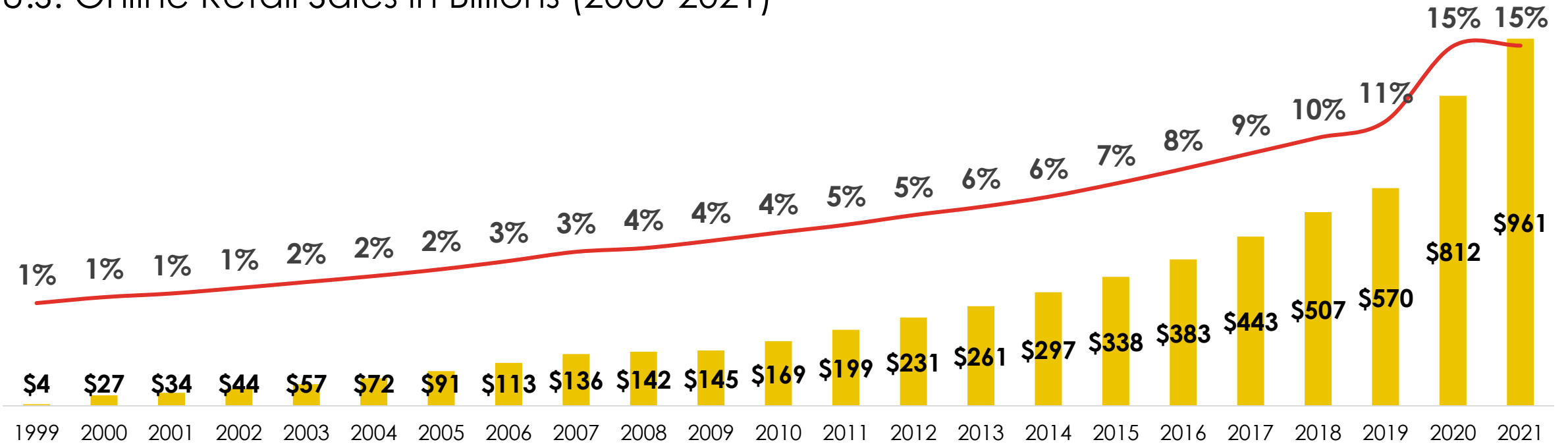
PAST CHANGES





Growth of e-commerce: U.S. online retail sales (2000-'21, \$B)

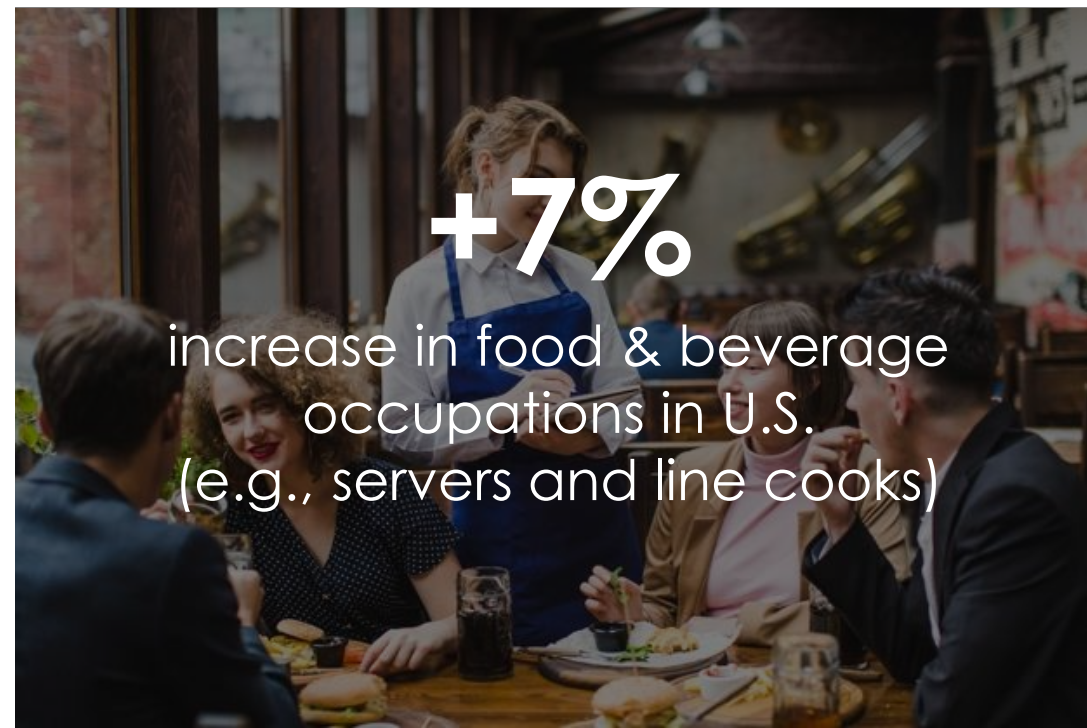
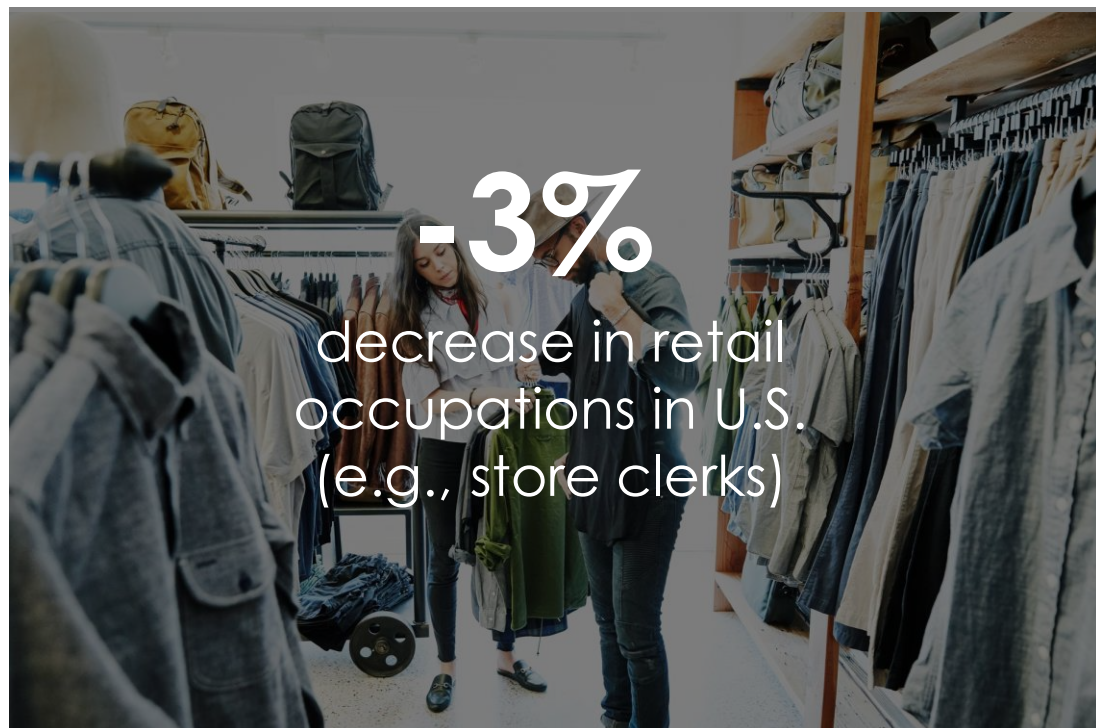
U.S. Online Retail Sales in Billions (2000-2021)



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

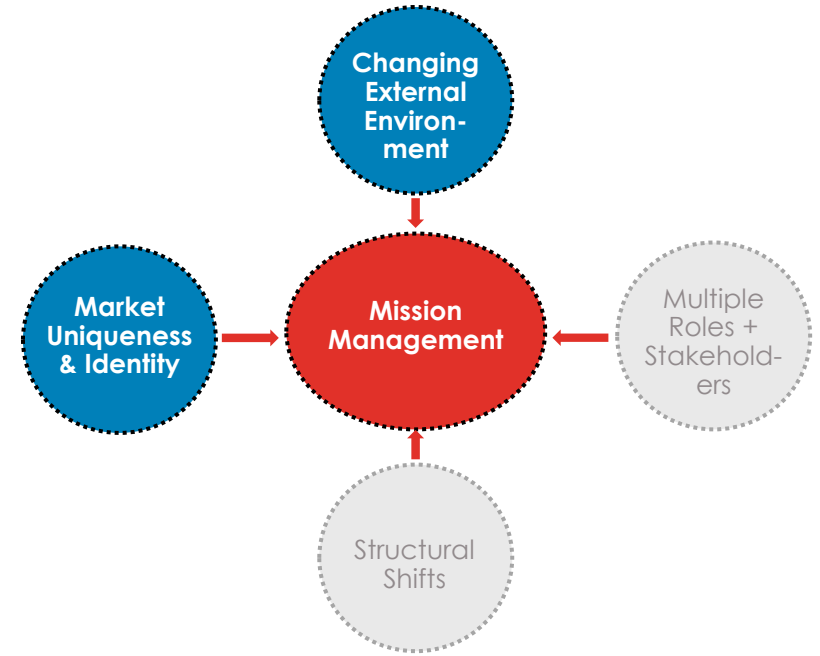
Source: US Census Bureau

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



Source: US Census Bureau

Changing Context



Case Study: Reading Terminal Market

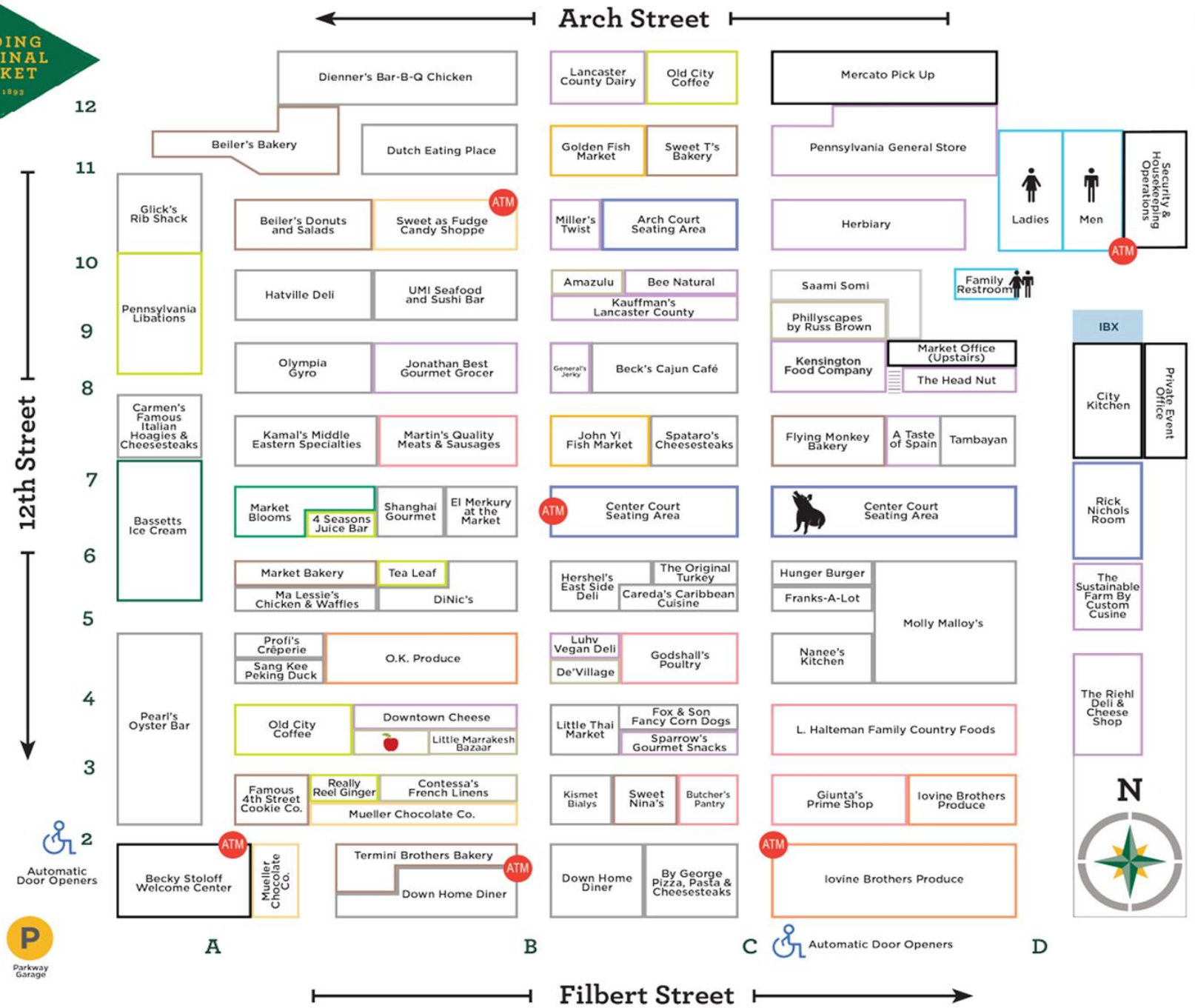
Reading Terminal Market, Philadelphia

Reading Terminal Market's 130-year history mirrors that of Pike Place Market in the contextual transformations that have challenged and shaped the market.



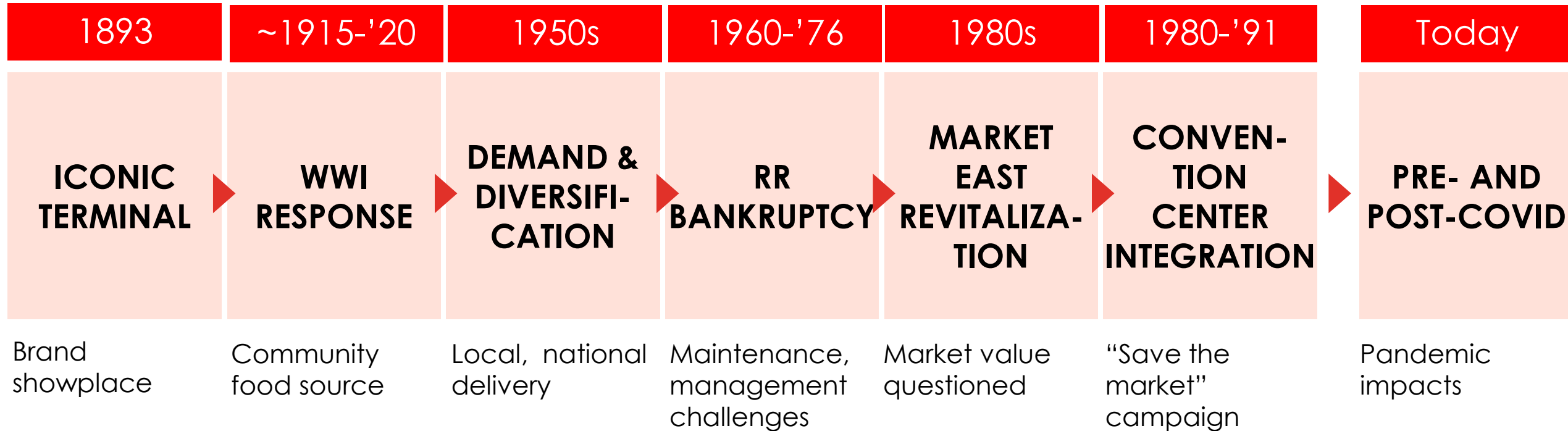


Reading Terminal Market grid

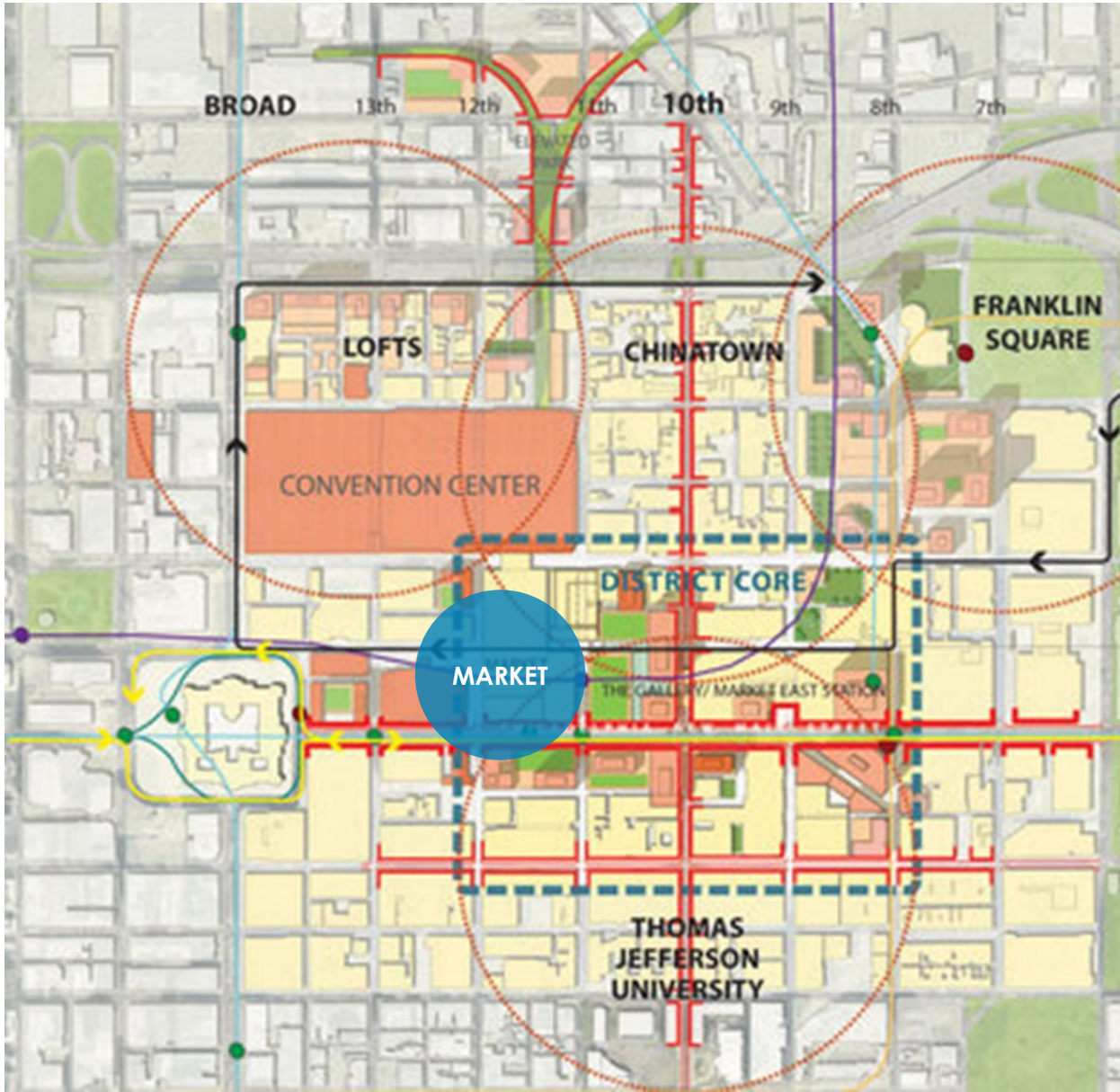


11th Street

Reading Terminal Market: six major contextual shifts

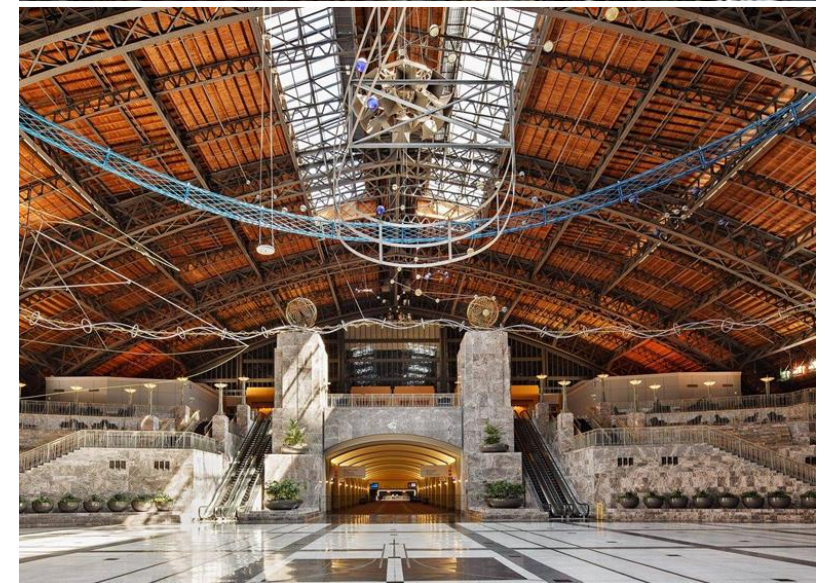
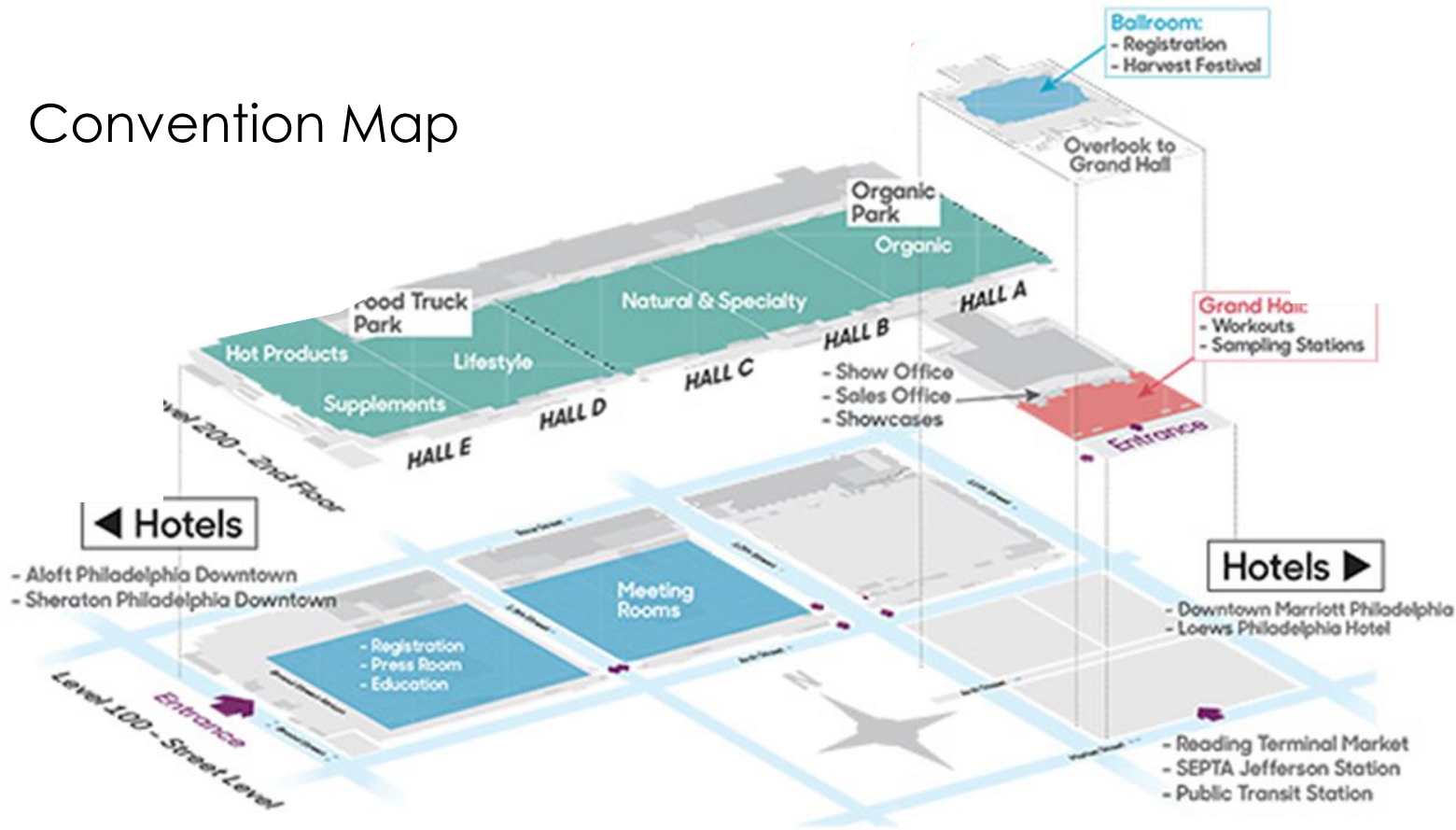


Reading Terminal Market: convention and hotel integration



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.

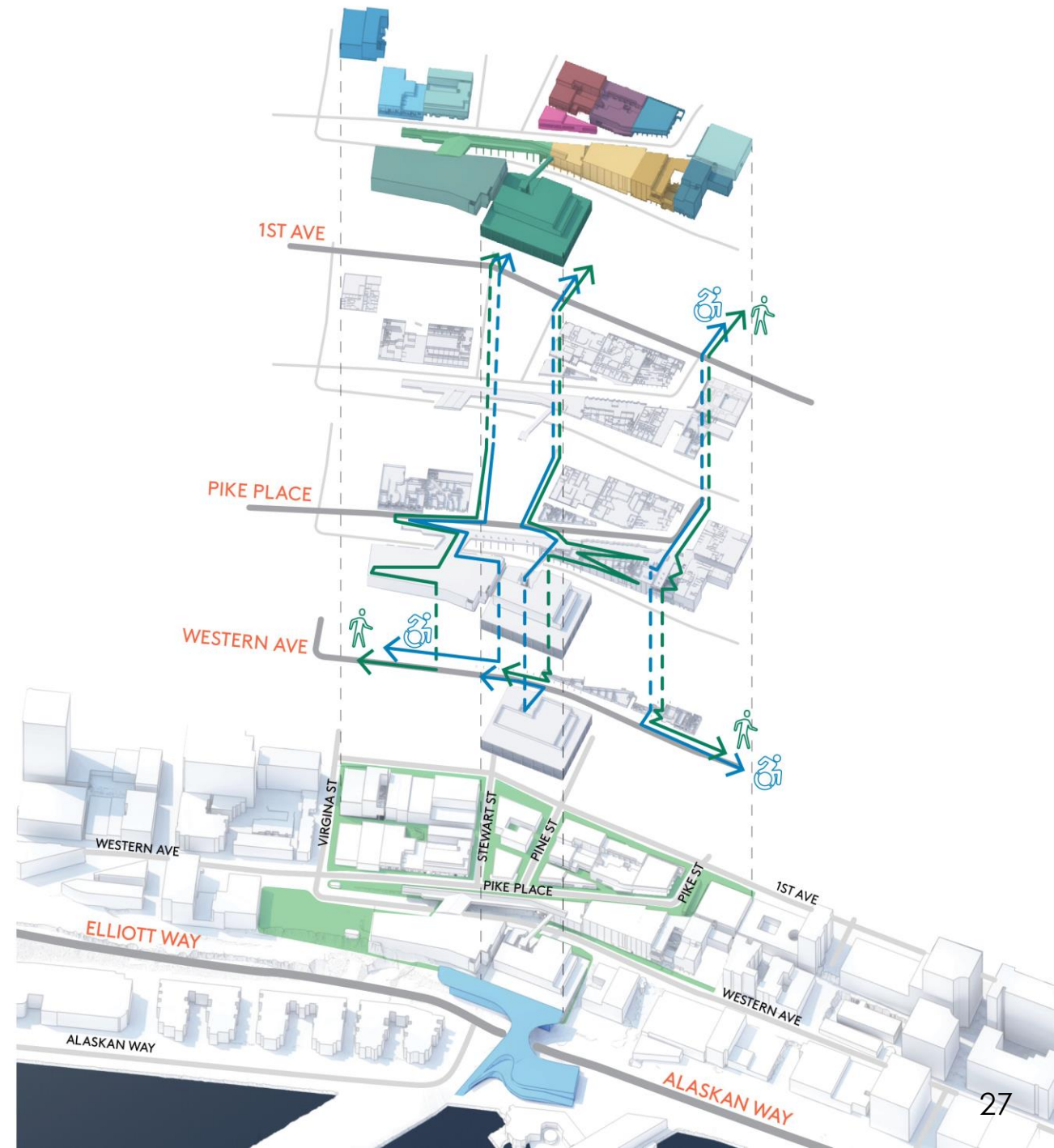
14 levels

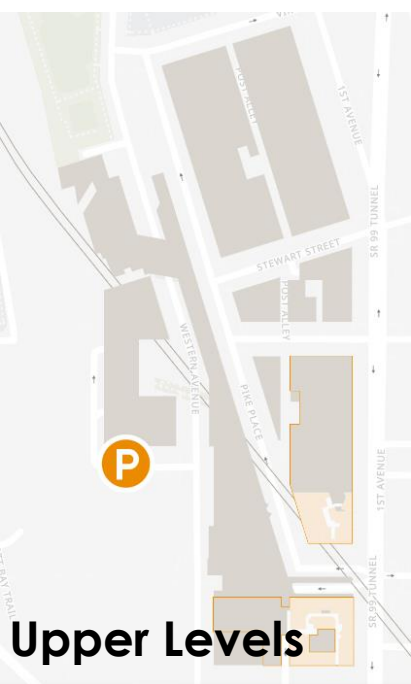
4 open to the street

2 1/2 blocks wide

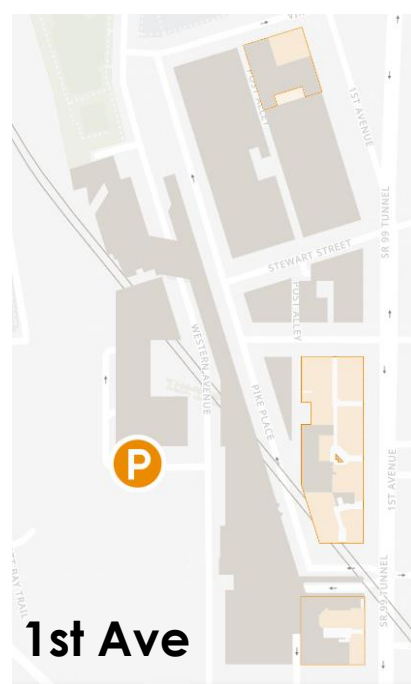
LEGEND

- 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

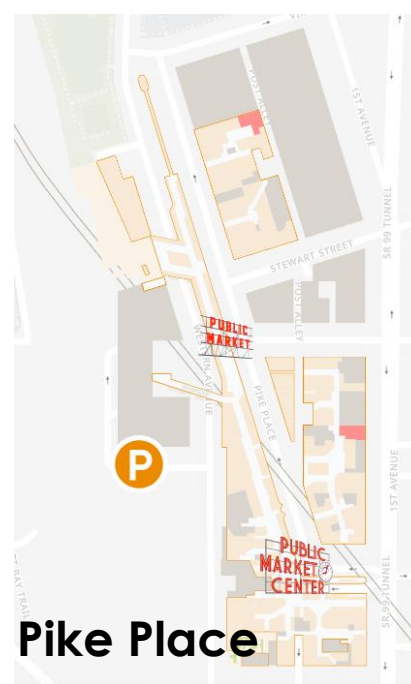




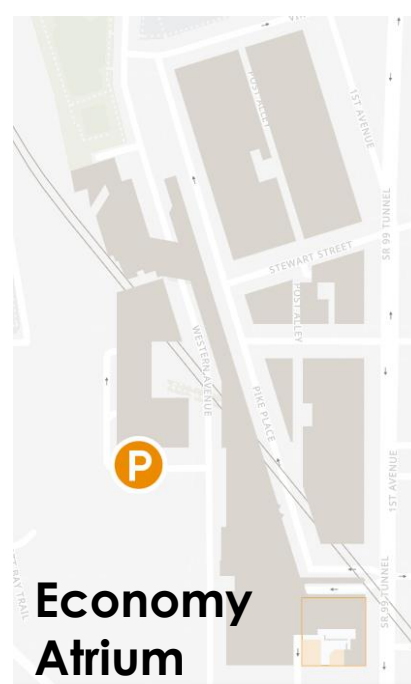
Upper Levels



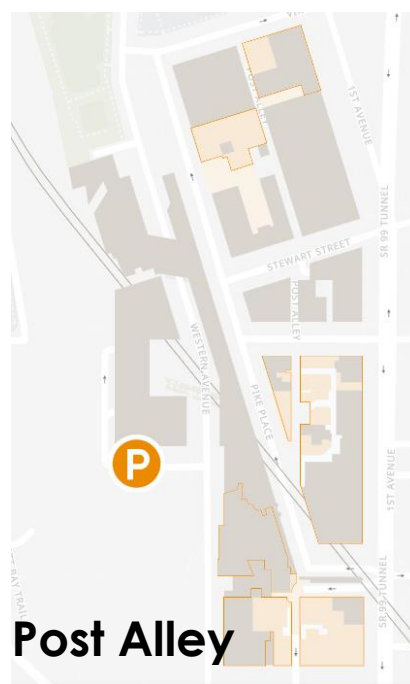
1st Ave



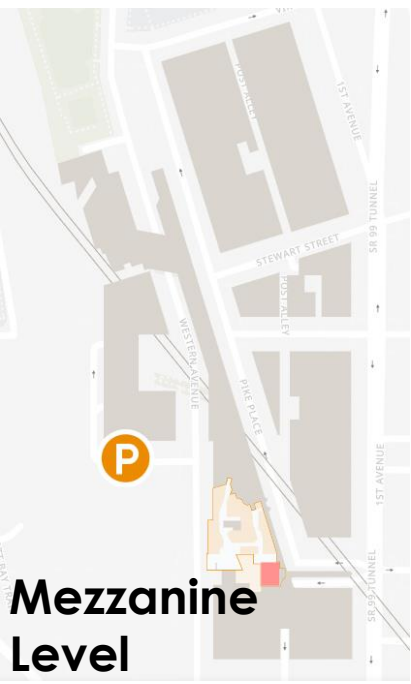
Pike Place



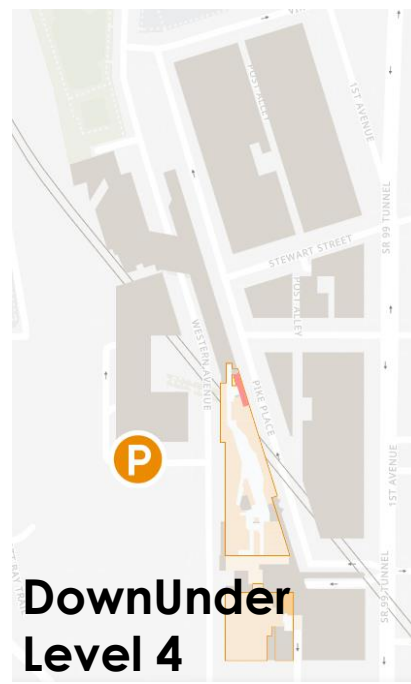
Economy Atrium



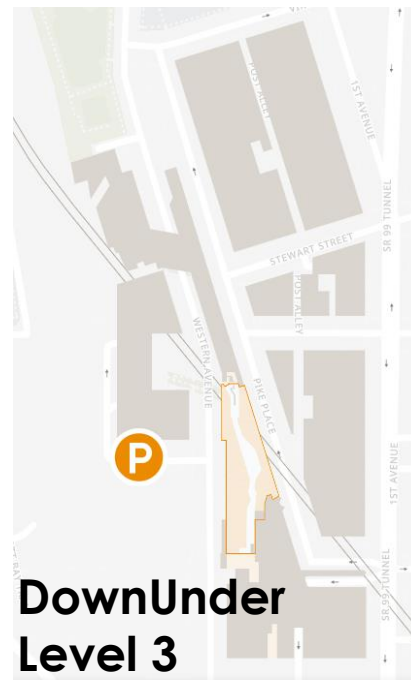
Post Alley



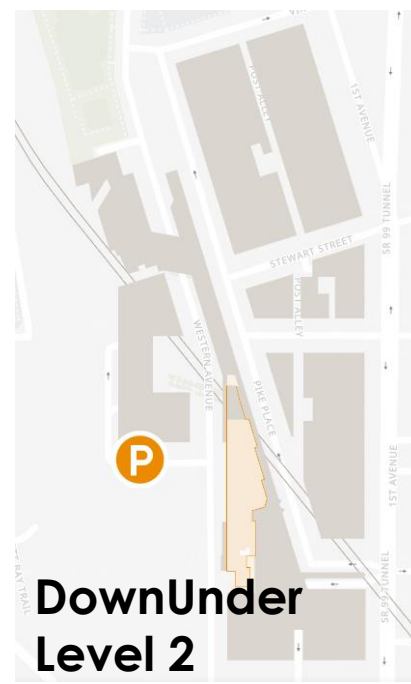
Mezzanine Level



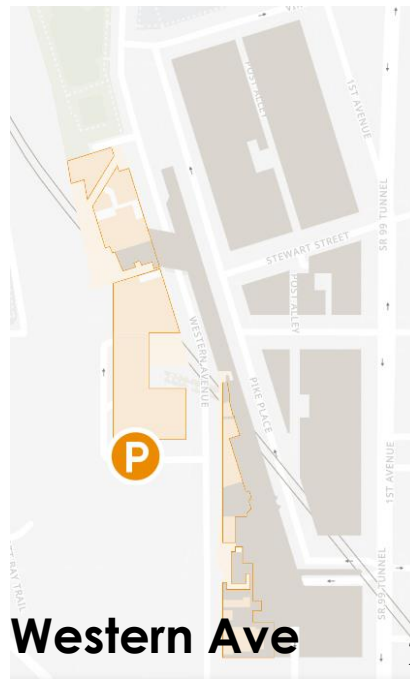
DownUnder Level 4



DownUnder Level 3



DownUnder Level 2



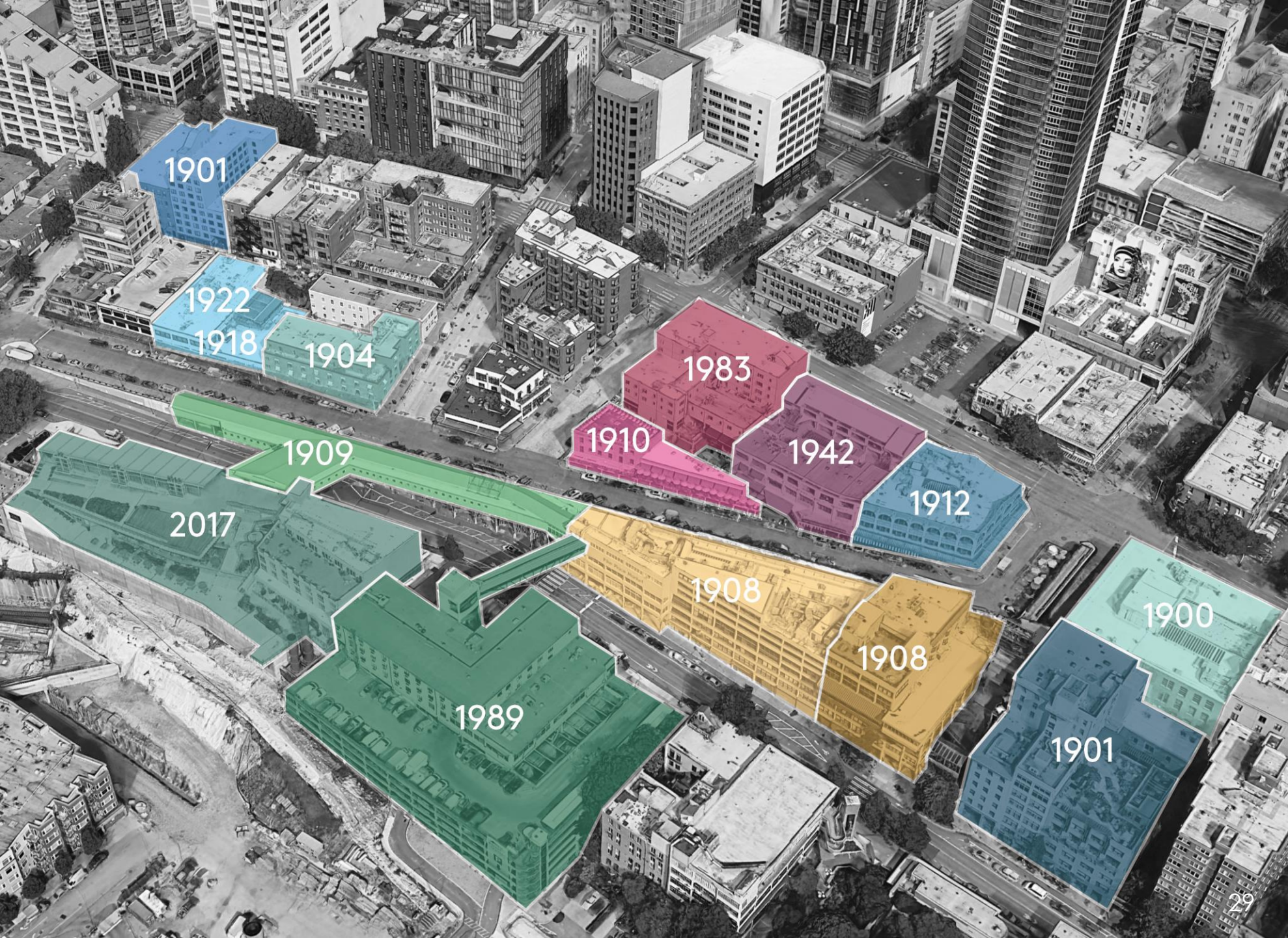
Western Ave

Market buildings

Age

LEGEND

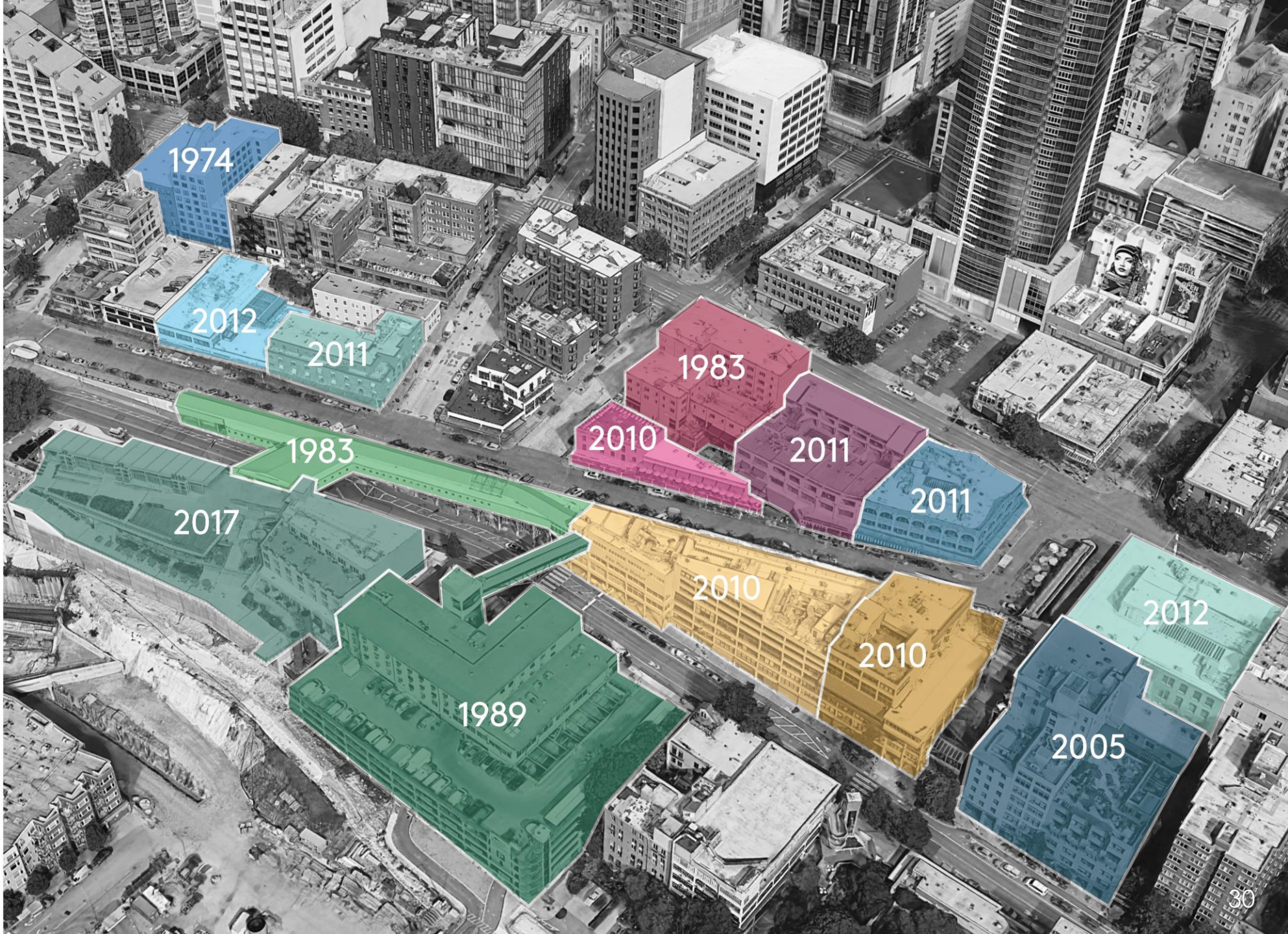
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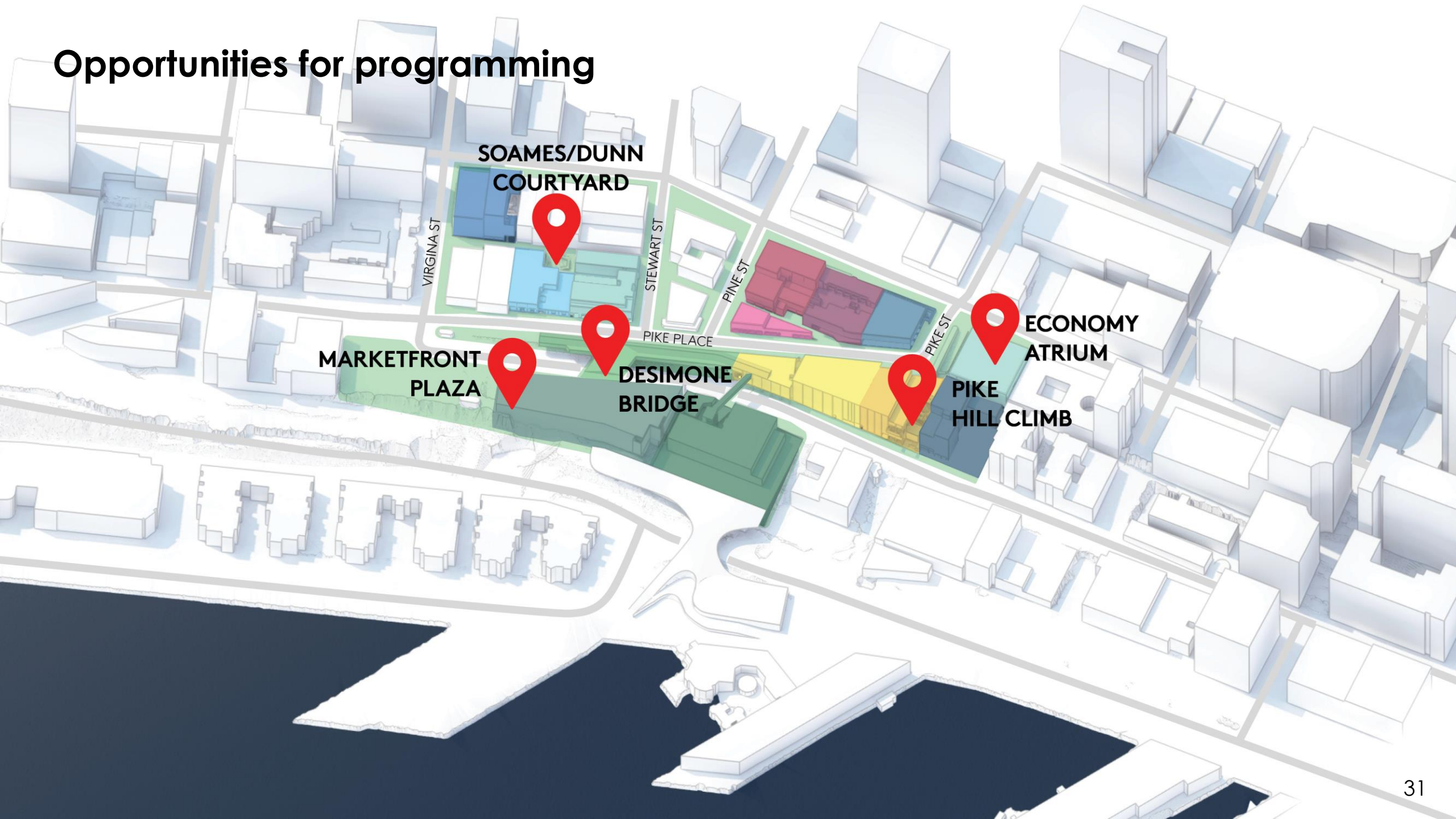
Market buildings Most recent renovation

LEGEND

- LIVINGSTON/BAKER BUILDING
- SOAMES/DUNN BUILDING
- STEWART HOUSE
- NORTH ARCADE
- PUBLIC MARKET PARKING GARAGE
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Opportunities for programming



**SOAMES/DUNN
COURTYARD**

**MARKETFRONT
PLAZA**

**DESIMONE
BRIDGE**

**PIKE
HILL CLIMB**

**ECONOMY
ATRIUM**

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



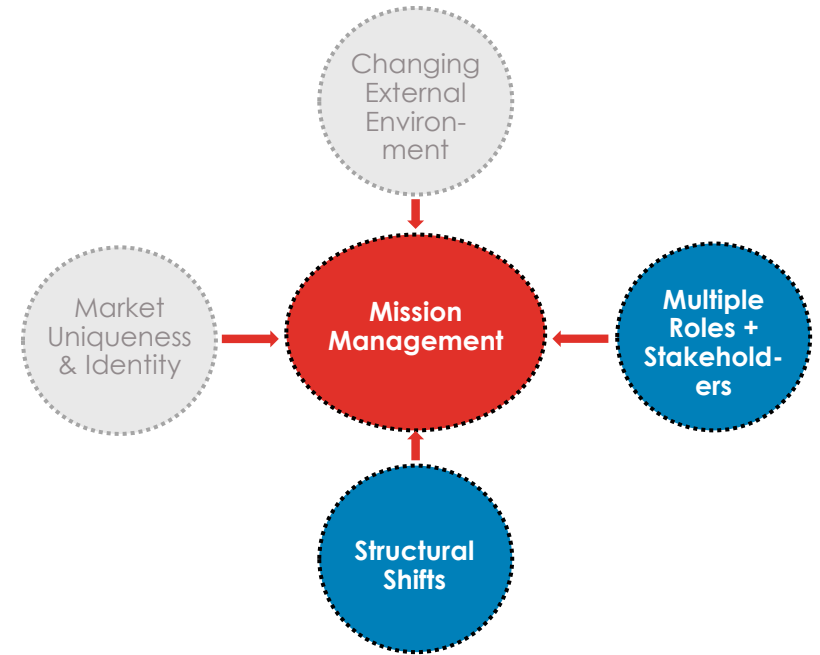
Master Plan Goal 1

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



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?

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

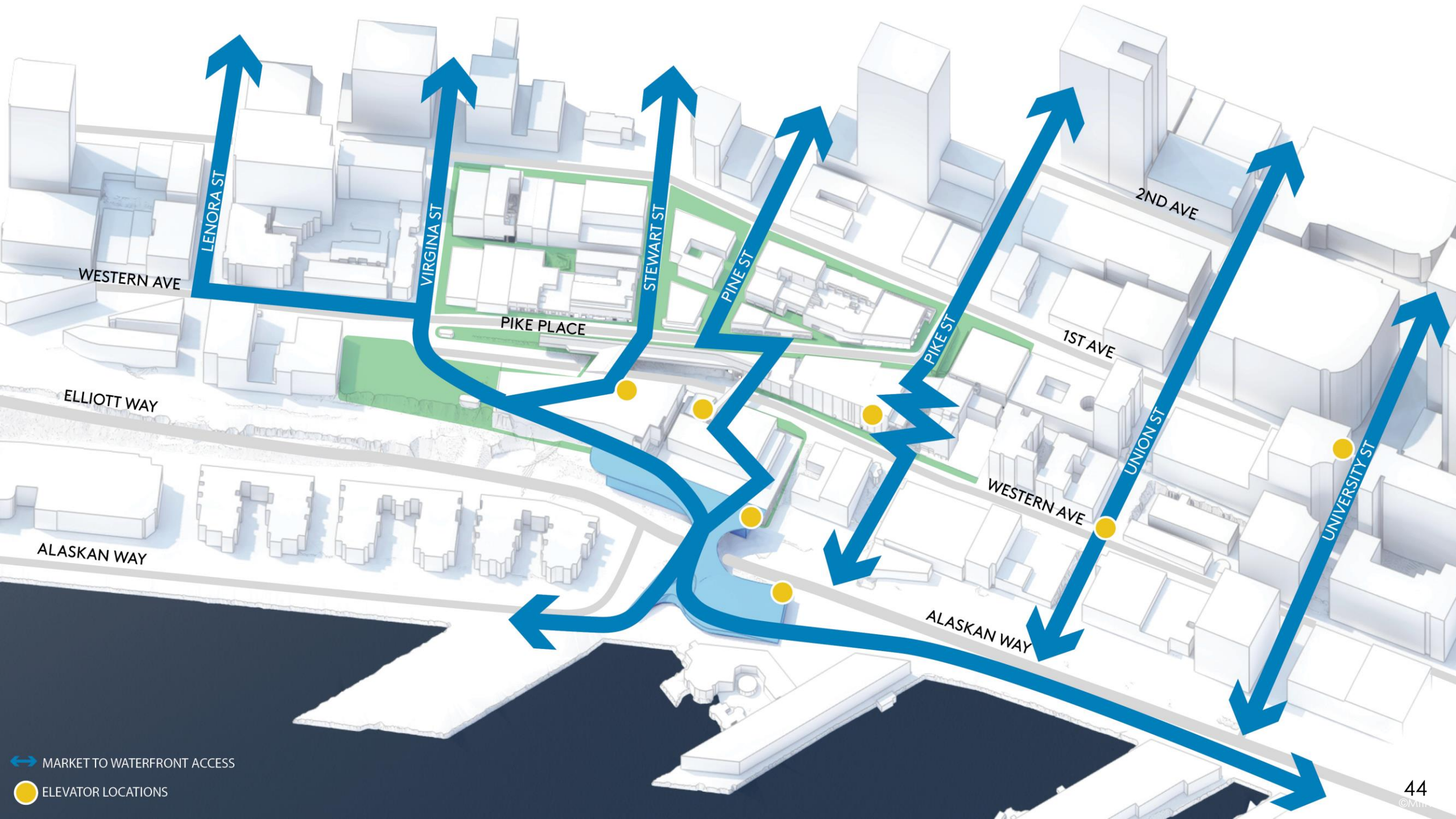
Equity is fair treatment, equality of opportunity, and fairness in access to information and resources for all.

Inclusion is a culture of belonging by actively inviting the contribution and participation of all people.

Master Plan Goal 3

Visitation - Local Audience Balancing
Tourism

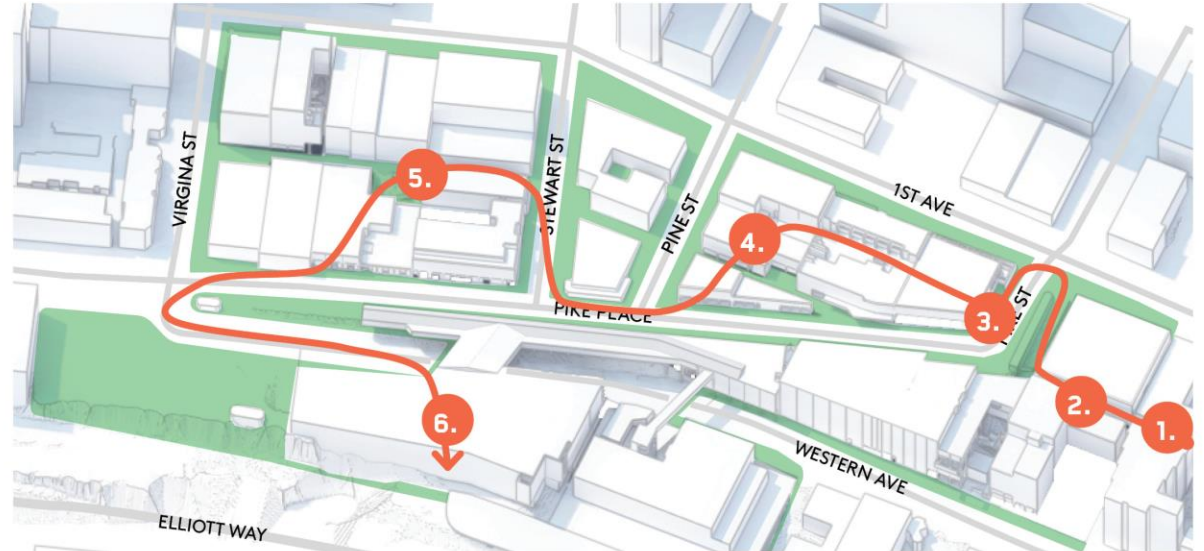
3. Reorient PPM to a local audience with a business model that makes PPM a place for people who live and work in Seattle to shop and gather. Ensure a "seat at the table" on relevant local policy issues.



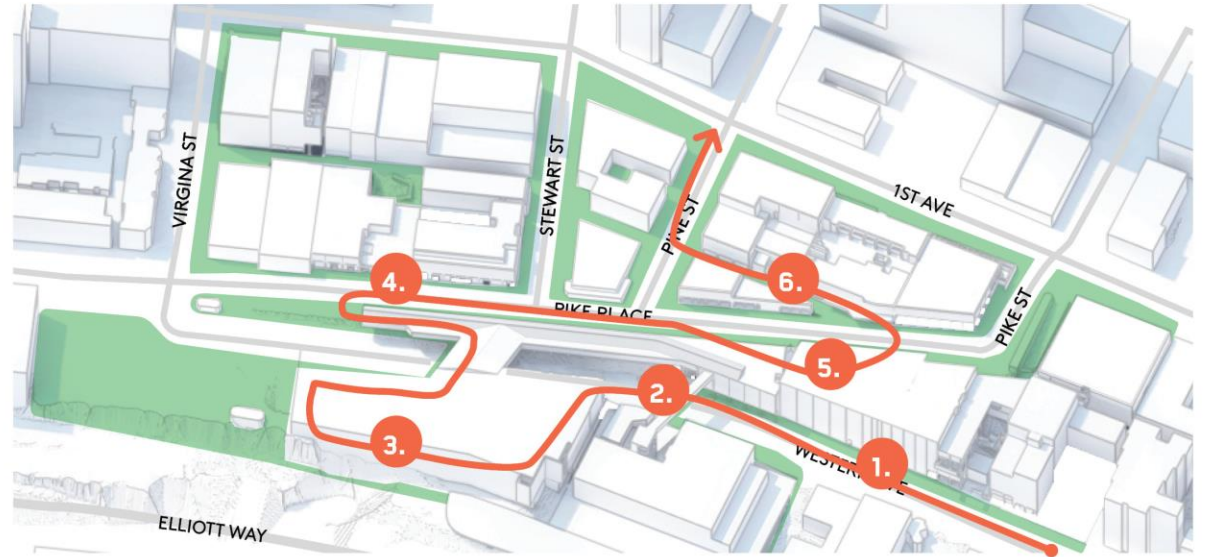
↔ MARKET TO WATERFRONT ACCESS

● ELEVATOR LOCATIONS

Nooks & Crannies

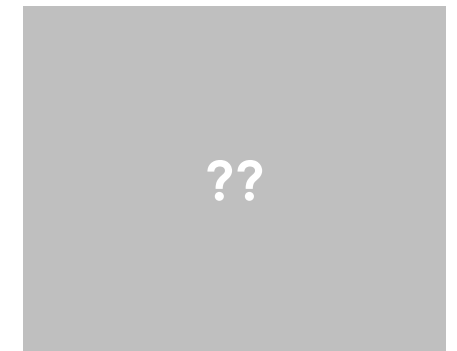
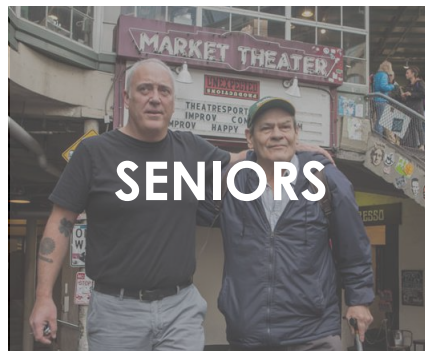
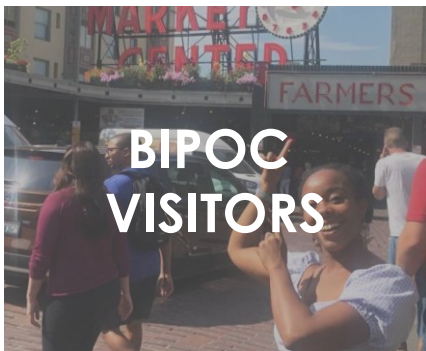
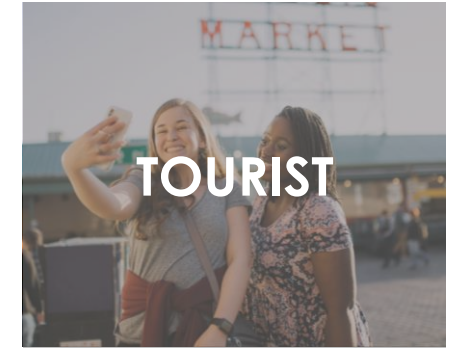


Wander Path



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