Today’s Agenda

1. Where We Are
2. Defining Food Life
3. City Markets as Regional Centers of Food Life
4. Pike Place Market as a Food Life Nexus
5. Defining a Food Life Strategy + Discussion
Where We Are
Master Plan Timeline

- **MARCH**
  - Kickoff

- **MAY**
  - Eco-Charrette

- **JUNE**
  - Opportunities, Constraints & DEI

- **OCTOBER**
  - Scenarios
  - 10/26 Retreat

- **DECEMBER**
  - Draft Master Plan

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**2023**

- Assessment
- Scenario Development

**2024**

- Master Plan

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**Stakeholder Engagement**

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**Council work sessions:**
- Social Services & Community Steward
- **Food Life Strategies (today)**
- DEI Framework
- Sustainability Action Plan + Physical Strategies
- Emerging Themes + Downtown Anchor
Why We’re Discussing Food Life

Macro Trends & Case Studies (MRA):
• Rise of online delivery, food halls, and interest in regional/sustainable cuisine
• Decline in farmers due to economics, workforce, climate challenges

Tenant & Other Interviews (BERK):
• “More programming around food, like festivals/night market, can attract more visitors, especially at night.”
• “Great place to shop for specialty goods and discover the joy of cooking. It began as a way to keep that affordable. Don’t lose this!”

Analysis of PPM Data (HR&A):
• 43% of all PDA revenues come from Restaurant, Food, or Farmers

Physical Analysis (Mithun):
• Physical constraints and opportunities for food life

Goal #1: Multiple Roles & DEI
Goal #2: Reattracting locals
Goal #4: Fin. Sustainability

PDA Council Opportunities & Constraints Workshop + Food Life Discussions
• Competing with grocery stores and supporting farmers
• Creating evening destination for locals
• PPM’s food offerings as a reflection of multicultural diversity
• Desire for greater synergies between food life & farmers/other retail

Emerging theme of food life as a core focus

MRA Strategic Positioning Analysis + Physical Analysis + Case Studies + Financial Analysis

Scenarios (food life curation, activation, place-making & financial implications)

TODAY:
• Definition of Food Life
• Food Life in other city markets
• Food Life Strategy for PPM

Master Plan
PPM: Goals and Roles from 6/29 Council Workshop

Goal #1: Multiple Identities & DEI
- Local & Tourist Destination
- Food Life Destination
- Farmers Market & Ag Hub
- Makers’ Market & Studio

Goal #2: Local Audience Oriented
- Retail Hub
- Small Business Incubator & Advocate
- Downtown Anchor
- Social Service & Community Steward

Goal #3: Improve Physical Plant

Goal #4: Financial Sustainability

Goal #5: Governance Rules

DEI embedded across all eight roles
Food Life as a Focus

Food Life Destination

Social Service & Community Steward

Local & Tourist Destination

Farmers Market & Ag Hub

Small Business Incubator & Advocate

Downtown Anchor

Retail Hub

Makers’ Market & Studio

= the soul of the city
Defining Food Life
Defining Food Life as a Distinctive and Sustainable Regional Food System
Defining Food Life: Across 8 Dimensions

- Food equity from production to consumption
- Culinary techniques + innovations
- Diversity, connectivity + inclusion
- Multi-cultural interfaces + influences
- Accessibility + addressing food scarcity
- Land-based food sources + systems ("Terroir")
- Regional sustainability
- Aquatic food sources + systems ("Merroir")

Regional Asset Management

Social impact Efforts
The Pacific Northwest is a **food life ‘cornucopia’** with its rich land-based produce and its bountiful sea-based foods - fish, crustacea, mollusks and shellfish.

**Multi-cultural influences** include Native American, Scandinavian, Irish, Mexican, Southern Black migrants, Japanese, Filipino, pan-Asian and Pacific Islander, and more recently African groups including Somali, Ethiopian and Eritrean immigrants.

This mix is reflected in a wide variety of **regional dishes, culinary fusions** and **evolving dining concepts**.
Defining Food Life: Pacific Northwest Culinary Culture

PPM is the only entity with the capacity, legacy and competence to advance this opportunity in full.

PPM can foster a culinary culture with local authenticity and destination appeal, built on a sustainable food system that extends from the producer to the consumer.
City Markets as Regional Centers of Food Life
City Markets as Regional Centers of Food Life
Markets as Centers of Food Life: Local vs Destination + Produce vs. Product

1. **Local**
   - Trinity Grove (Dallas)
   - Ponce City Market (Atlanta)
   - Eataly (multiple sites: NYC, Chicago, Boston, LA, Las Vegas, Dallas, etc.)
   - Avanti F&B Incubator (Denver)
   - Grand Central Market (Los Angeles)

2. **Destination**
   - Toyosu Market (Tsukiji) (Kyoto)
   - Mercado Ribera (Bilboa)
   - Marche des Enfants (Paris)
   - Cours Saleya (Nice)
   - St Lawrence Market (Toronto)
   - New Sydney Fish Market (Sydney)
   - Reading Terminal Market (Philadelphia)
   - Granville Island Market (Vancouver)
   - LA Farmers Market (Los Angeles)
   - San Miguel Market (Madrid)
   - Time Out Market (Lisbon)
   - LA Farmers Market (Los Angeles)

3. **Produce-Focused**
   - Borough Market (London)
   - Marche des Enfants (Paris)
   - Westside Market (Cleveland)
   - Oxbow Market & Copia (Napa)

4. **Product-Focused**
   - Mercado Ribera (Bilboa)
   - Marche des Enfants (Paris)
   - Westside Market (Cleveland)
   - Oxbow Market & Copia (Napa)

= Case Studies
Positioning Markets as Food Life Destinations and Local Community Hubs

Best Practices from Review of 24 Markets:

1. Committing to refining **tenant curation** processes
2. Addressing **shifts in dining patterns** across all market segments
3. Creating offerings and environments which support **local connectivity**
4. Targeting Food Life experiences which are **unique to the region** and draw visitors
5. Leveraging events **programming and animation** as a key function
6. Developing approaches to supporting **producer participation** in the Market
7. Fostering **partnership relationships** to advance goals
Markets as Centers of Food Life: Local vs Destination + Produce vs. Product

= Focus Case Studies Today
Markets as Centers of Food Life: Granville Island Public Market, Vancouver

**2040 Strategy** commits to establishing Vancouver’s leading food destination and an international center of innovation in the culinary arts:

- **Demonstration kitchens** with a rotation of regional chefs
- **On-site culinary institute**
- **Space for food-related events**
- **Restaurants on the leading edge of culinary innovation**
- **Underrepresented and emerging food concepts**
- **First Nations’** culinary traditions and chefs
- **Evening operating hours** for dining + food events
- **Market District**
- **Mix of specialty markets** e.g., Spice Market, Fish Market, Forager Market, Ethnic Market
St. Lawrence Market’s Strategy focuses on 3 mandates:

1. **Build Local Appeal as Basis of Authenticity:**
   - Redevelop the North Market as a mixed-use ‘green’ market for **community events** including the **Saturday Farmers Market**.
   - Develop new tenant targets and programming to support local use of the Market Complex as a **social convening point** and **anchor for the evolving neighborhood**.

2. **Food Life as Destination Strategy:**
   - Position the Market as the leading institution for Toronto’s evolving **pan-cultural food scene**
   - Position the Market as a **food destination** and must-see on the visitor itinerary.
   - Enhance the Market’s role as a gathering point, Market, and dining destination for the **community**

3. **District Level Integration:**
   - Lead a **district integration initiative** with the surrounding York neighborhood to preserve character of Heritage Conservation District and set design standards for new construction.
Pike Place Market as a Food Life Nexus
PPM’s Mix of Offerings Has Evolved Over Time: From 625 Farmers to …..
**Number of Farm and Craft merchants is a daily average based on total Farm and Craft attendance data. Flower farmers (45 permits) are included in Farm (95 permits total).**

**Food, Restaurant, and Retail (“Non-Food”) revenues to PDA include base + percentage rent as well as Common Area Charges (CAC). Revenues from Utilities, Tenant Reimbursement, and Late Fees/Service Charges are included in Misc. instead of their respective merchant type because they could not be disaggregated. Does not include payments/reimbursement from PPMQB3 (entity created by PDA to facilitate new market tax credit funding).**
PPM in the Future: Dependent on Response to Changing Context

Then

Tomorrow?

Now

Destination

Local

Produce-Focused

Product-Focused

Tourist destination
PPM: Community Connection and/or Tourism Destination

• **Food Mix as Engagement and Experience:**
  
  • **Locals** seek out food experiences that tend to be casual, affordable, distinctive in social environments…"food as engagement”
  
  • **Overnight tourists** tend to seek out food experiences that are unique, entertaining, in experiential environments…"food as experience”

• **The Market as Asset and Attraction:**
  
  • **Locals** seek out goods that are not generally available elsewhere, based on quality, diversity and service...."the Market as a unique community asset”
  
  • **Overnight tourists** seek out market experiences that are memorable and entertaining…"the Market as a destination attraction"
PPM: Changing Downtown and Waterfront – Threats and Opportunities

Redevelopment of Waterfront:

• As a **vertical market** PPM is in a unique position to create physical and programmatic connections to the waterfront and the downtown - advancing roles as a **Destination** and **Community CenterPoint**.

• PPM can **benefit from an increase in tourism to the waterfront**, but risks devolving towards a tourist attraction rather than authentic experience.

Need to Revitalize Downtown:

• PPM’s role as an authentic place of **community identity and connection** can be enhanced as an **anchor for downtown revitalization**, but will likely involve some level of conflict with other interests involved in Downtown redevelopment.
Defining a Food Life Strategy
A Food Life Strategy for PPM

1. **Curate food offerings and experiences**
   - Curate market and food offerings to address local needs and wants; and visitor wants
   - Embrace curation as a process for building a critical mix of offerings
   - Identify zones and itineraries across all levels of PPM for Food Life offerings in the context of waterfront and downtown revitalization

2. **Renew “Meet the Producer” strategy**
   - Identify and support producers’ needs to elevate their Market participation
   - Diversify the Market’s mix of produce and harvested offerings – highlighting local and artisanal products – to serve local demand and create more opportunities to supply Market restaurants

3. **Adapt to changing context**
   - Evaluate Market opportunities in relation to broader Downtown and the waterfront
   - Extend the regional reach of PPM in terms of its role as a steward for sustainability and equity
   - Identify and prioritize facilities and technologies that support the success of PPM’s tenants and the experience of its guests
A Food Life Strategy for PPM: Physical Strategies

“Taste of the Market”
• Multi-cultural PNW food experience
• Taking on a Food Studio, Food Hall or Street Market

Waterfront Connection
• Food offerings at lower Market level

First Nations food and culture anchor experience
• Showcasing origination of PNW cuisine

Restaurant Incubator
• Featuring 4-5 startups that roll out or into PPM every 3 years

Dining Cluster of Restaurants
• Designed to draw locals with space that is off tourist itinerary

Cooking Studio
• Featuring rotating chefs

Programmable Space
• Allowing farmers market to expand as multi-cultural food and produce Saturday market

PNW Winery Center
• Taste of Washington’s wineries and distilleries
• A draw to locals
What if we...

• Supported the courtyard with indoor/outdoor seating and dining?
• Created a PNW winery center adjacent to the courtyard?
• Added visual art to link the upper and lower levels i.e., umbrellas?
What if we...

- Created more direct engagement between seating and adjacent retail spaces?
- Considered noise reduction strategies?
- Opened up the connection to 1st Ave?
What if we...
• Programmed the space for a Saturday produce market?
• Moved the Food Bank up to face onto Western Ave to better support their activities and highlight PPM’s role as a social service provider?
The consultant team believes the PDA should embrace Food Life strategies with intentionality.

**Benefits**

- DEI and social impact
- More local visitors during shoulder season within additional revenues to businesses and PDA
- Larger - and potentially more diverse and distinctive - base of producers selling to more locals and Market businesses
- Stronger physical and programmatic ties to waterfront and downtown, benefitting Seattle as a whole
- PNW core to the Market’s identity and brand
- Other?
Not adopting Food Life as the central idea of the Master Plan is a greater risk than any risk inherent in its adoption. There are, however, risks.

Risks
- A less quirky, exploratory experience

Challenges
- Physical upgrades to accommodate more food uses and programming
- Subsidy to support and retain farmers
- Capacity to curate, recruit, support, and advocate for more food merchants and manage new programming
Discussion:

As of now, do you agree that Food Life is the probable central, animating idea of the Master Plan?

Based on PPM’s values, strengths, and opportunities, which potential social impacts should PPM put at the forefront of a Food Life strategy?