

Food Life Nexus

PDA Council Discussion

August 31, 2023



Social Services – Recap of What We Heard

1. **There is an interest in defining the Market's current and future roles around social services (including as landlord and facilitator).**
2. **As a result, there is a need to build more regular, open, and meaningful dialogue and relationships between the PDA, Foundation, and other partners to conduct joint planning and goal-setting to execute the goals of the Market as a social service provider.**
3. **From a social support perspective, the Market's primary focus is on its immediate community, defined as business owners, their employees, and Market residents.**
4. **Social service needs are evolving and are exacerbated by Seattle's housing affordability challenges.** The PDA could take the lead on addressing some and could identify ways to facilitate and/or partner on addressing others. Major needs include:
 - More affordable housing
 - Subsidy for farmers and other workers to ensure their continued presence
 - Improved worker conditions – ranging from break rooms to healthcare*
 - Physical upgrades to the Food Bank
5. **Physical accessibility improvements are important to serving a diverse Market community and its visitors.** They also entail significant financial and space challenges.

*Acknowledging that the PDA cannot provide the latter directly.

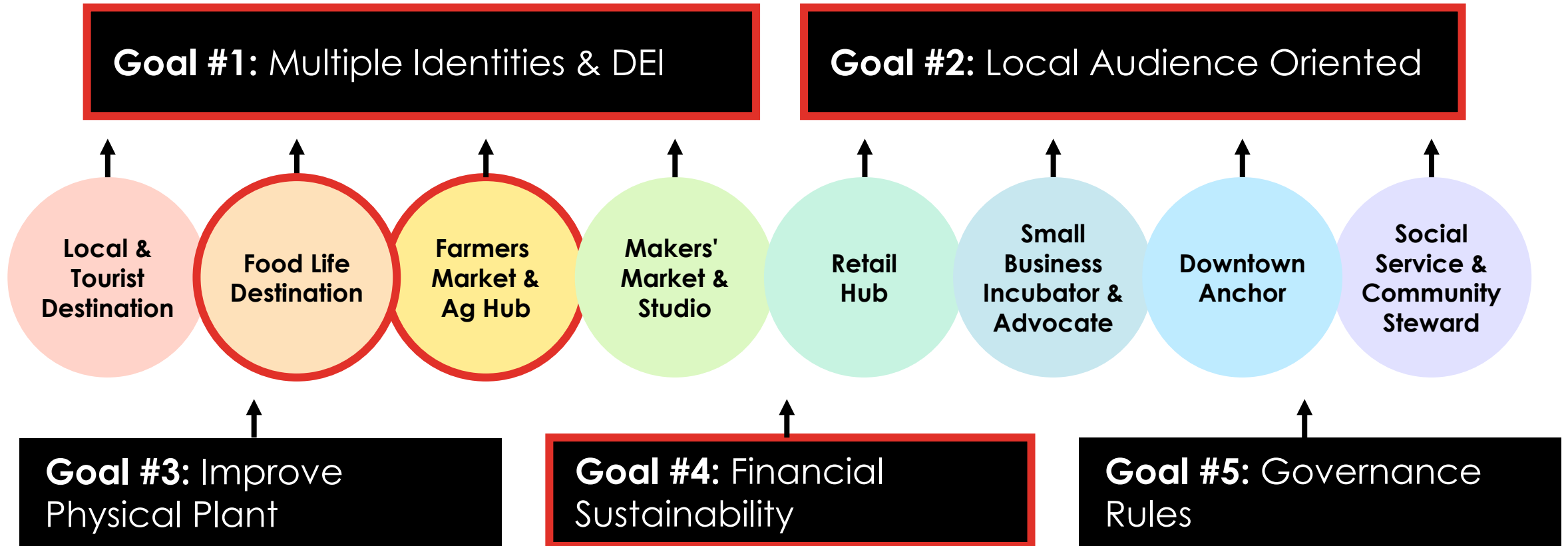
Today's Agenda

1. Defining Food Life
2. City Markets as Regional Centers of Food Life
3. A PPM Food Life Strategy + Discussion

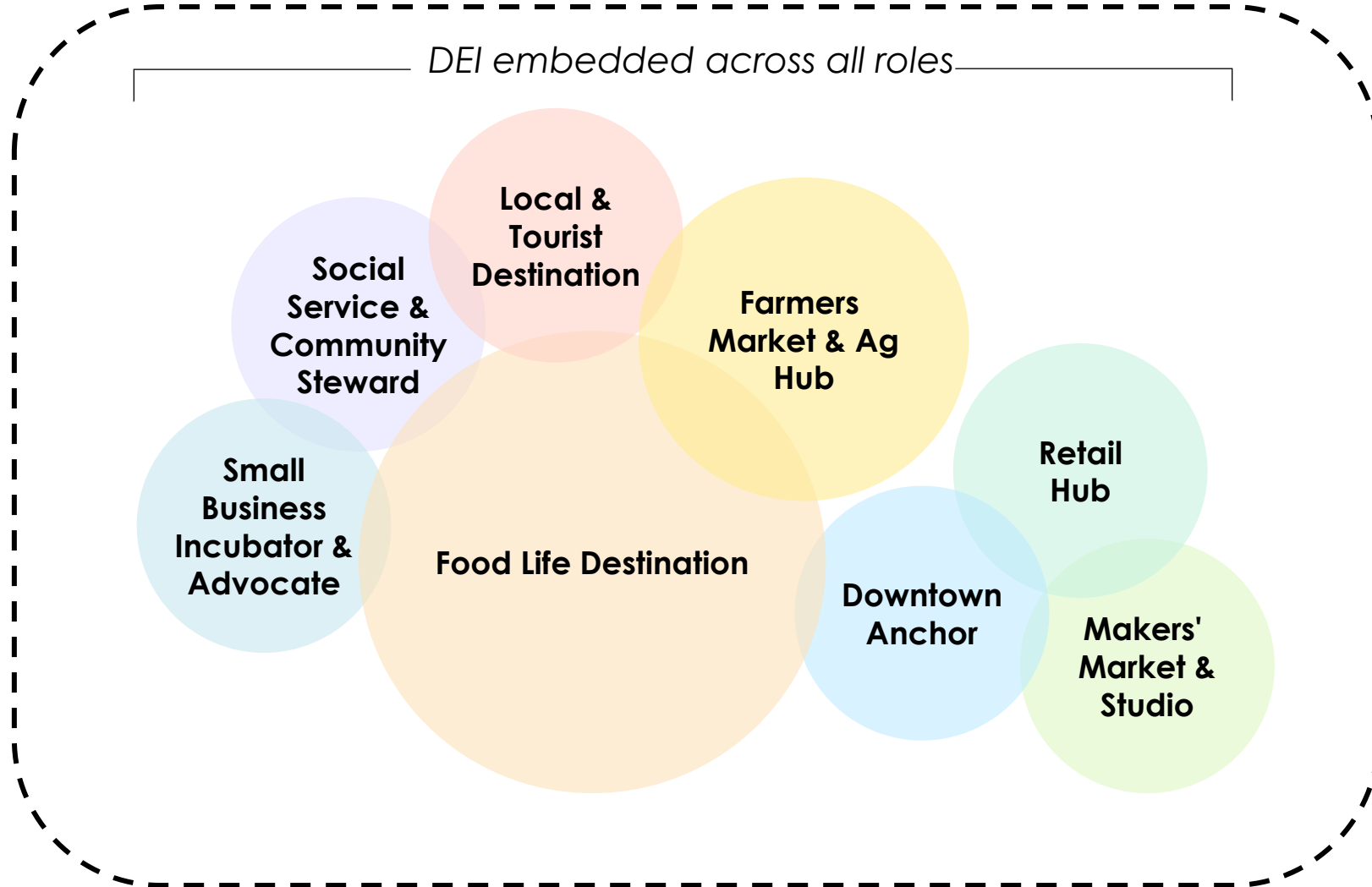


PPM: Goals and Roles from 6/29 Council Workshop

DEI embedded across all eight roles



Food Life as a Focus



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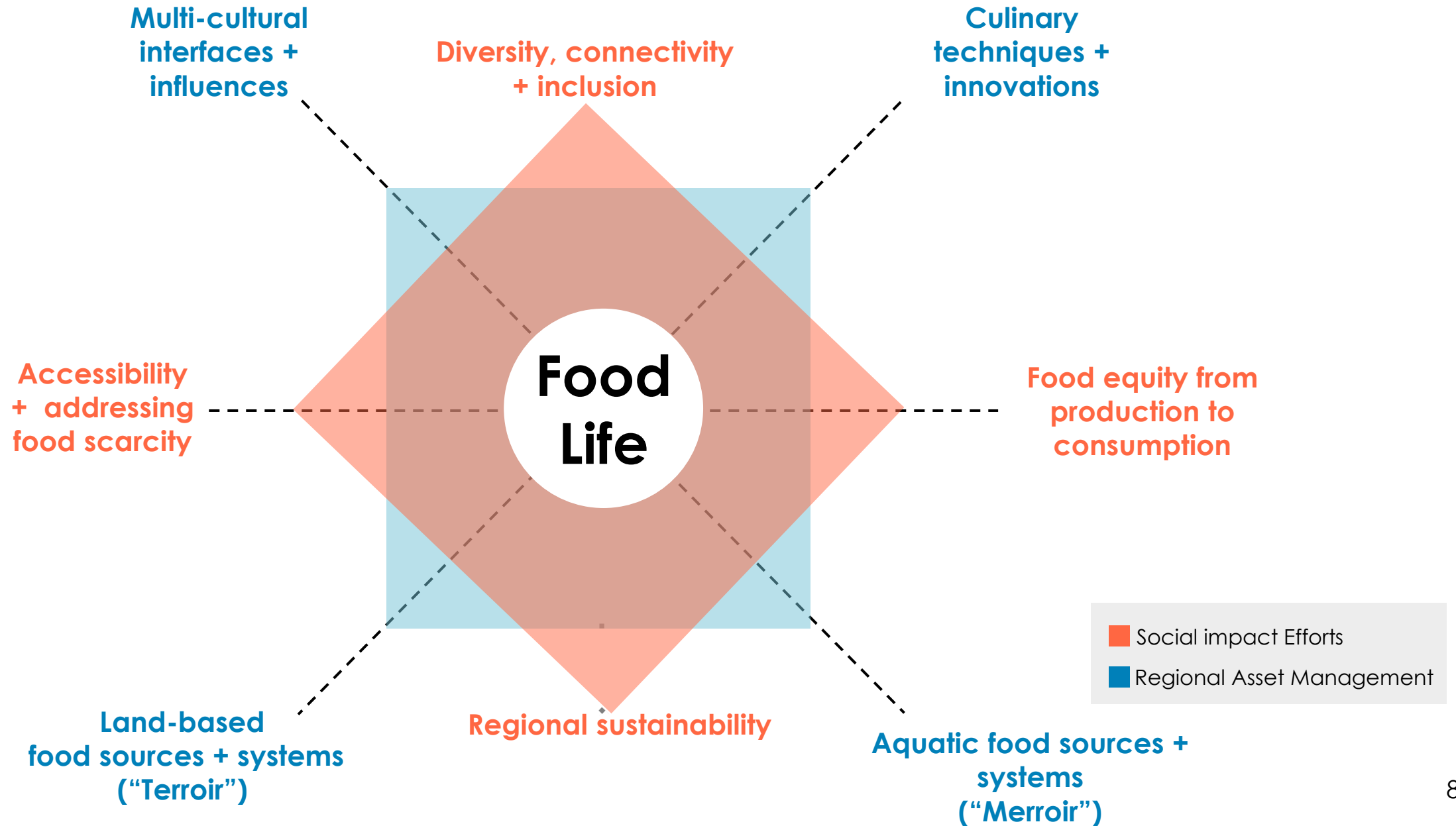
**the soul of
the city**

Defining Food Life

Defining Food Life as a Distinctive and Sustainable Regional Food System



Defining Food Life: Across 8 Dimensions



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.

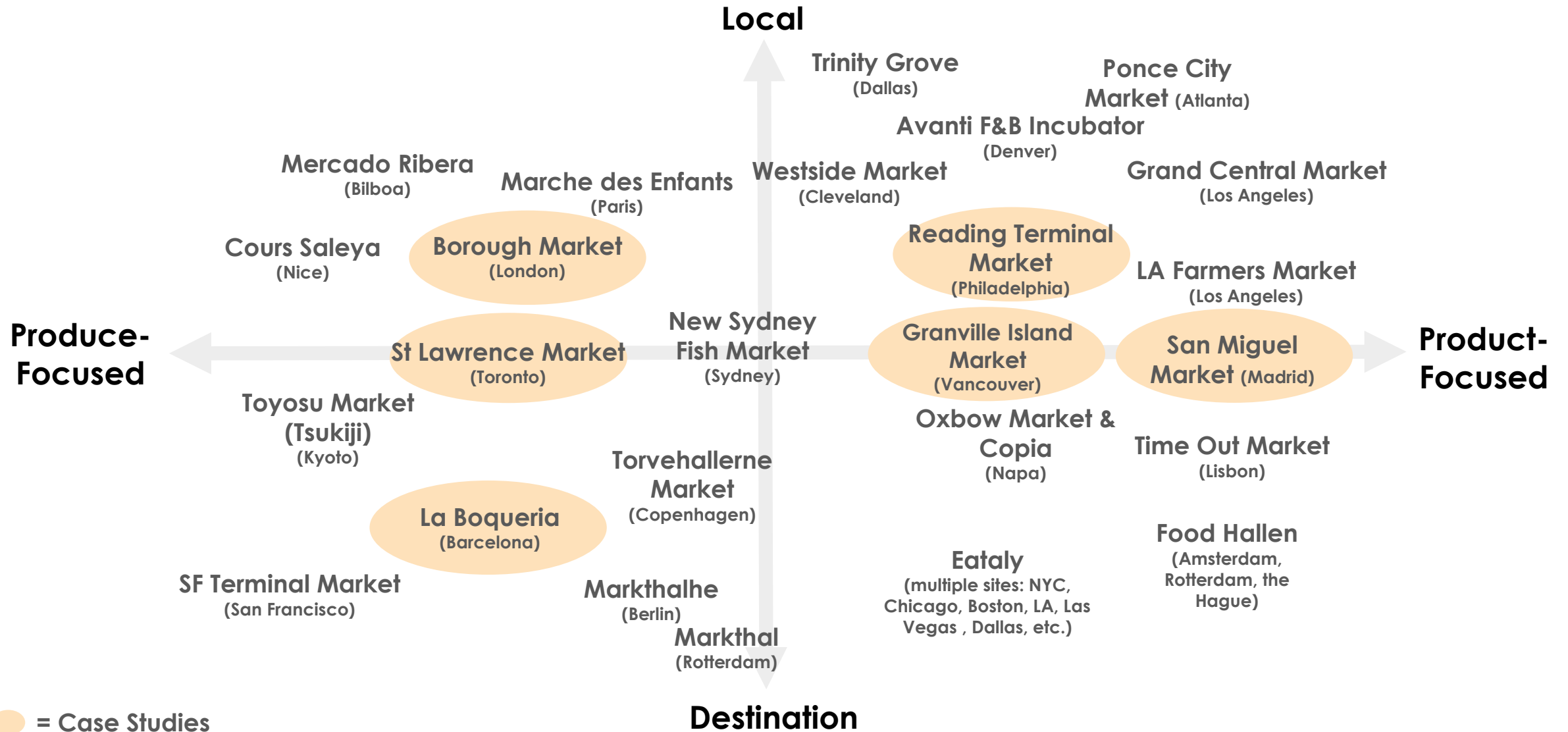


City Markets as Regional Centers of Food Life

City Markets as Regional Centers of Food Life



Markets as Centers of Food Life: Local vs Destination + Produce vs. Product



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



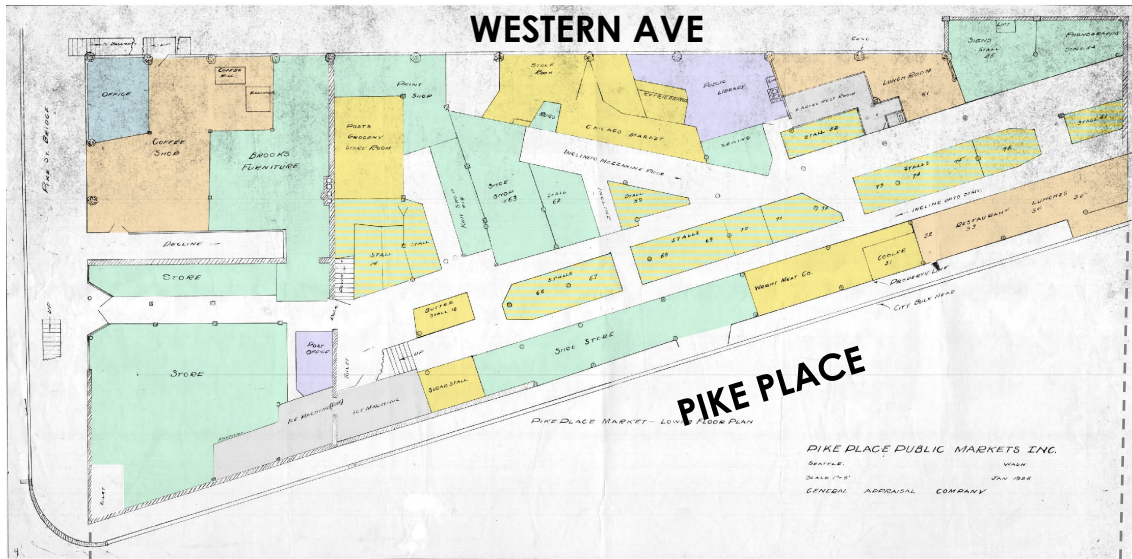
A PPM

Food Life Strategy

+ Discussion

PPM's Mix of Offerings Has Evolved Over Time: From 625 Farmers to

Down Under,
1929



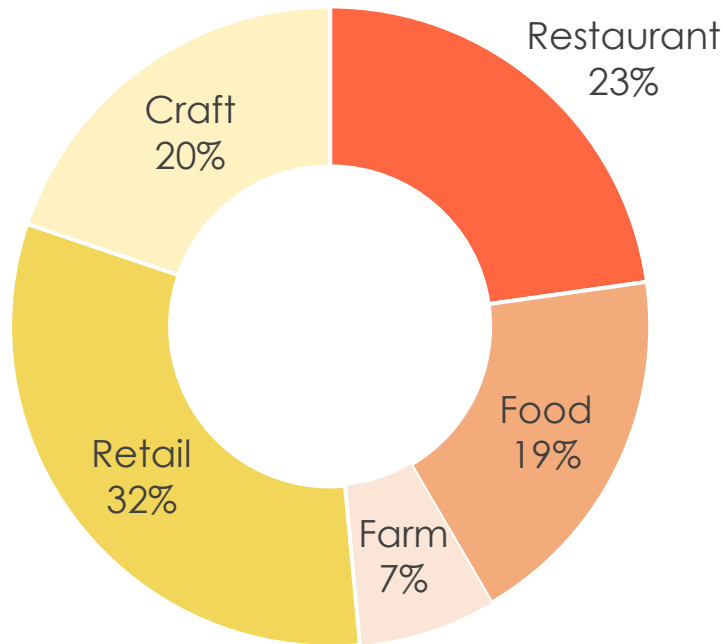
- Food Provider & Restaurant
- Produce & Agriculture
- Craft
- Retail
- Business
- Housing & Social Services
- Utilities

Down Under,
Today



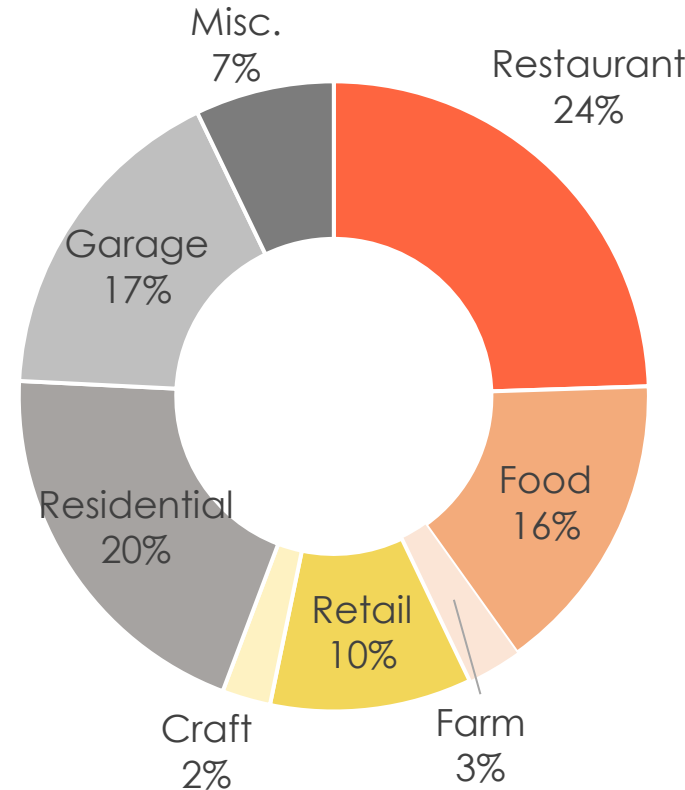
Food Life is a Revenue Driver for PPM

Distribution of Merchant Types at PPM, 2022*



49%
of merchants are
Restaurant, Food, or
Farm

Distribution of PDA Revenue Sources, 2022**



43%
of PDA Revenues
from Restaurant,
Food, or Farm

* 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



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



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



Waterfront Connection

- Food offerings at lower Market level



First Nations food and culture anchor experience

- Showcasing origination of PNW cuisine



Programmable Space

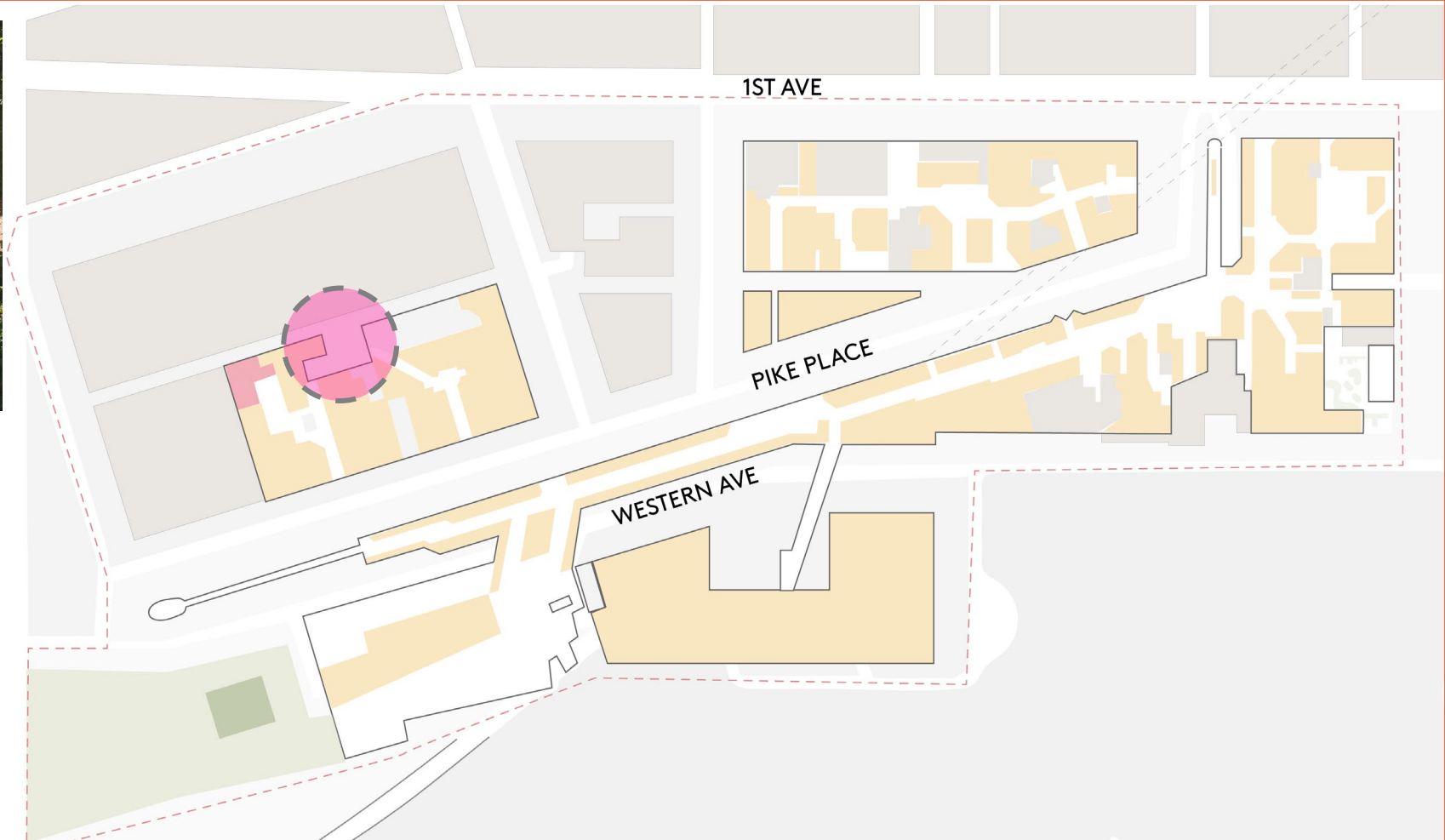
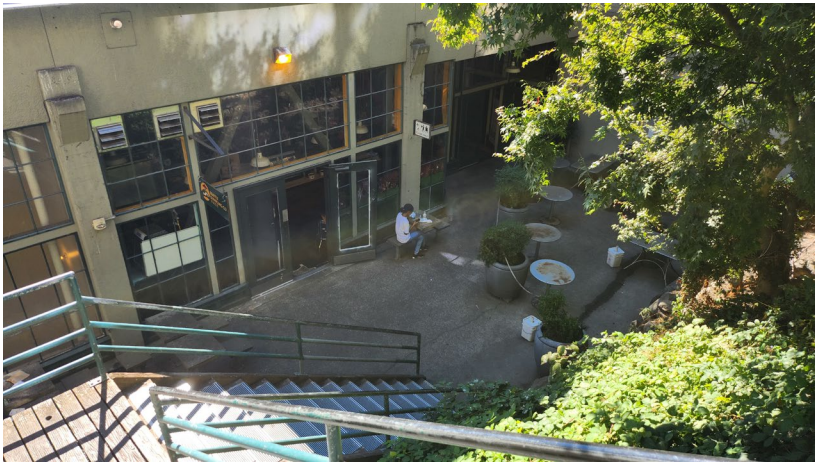
- Allowing farmers market to expand as multi-cultural food and produce Saturday market



PNW Winery Center

- Taste of Washington's wineries and distilleries
- A draw to locals

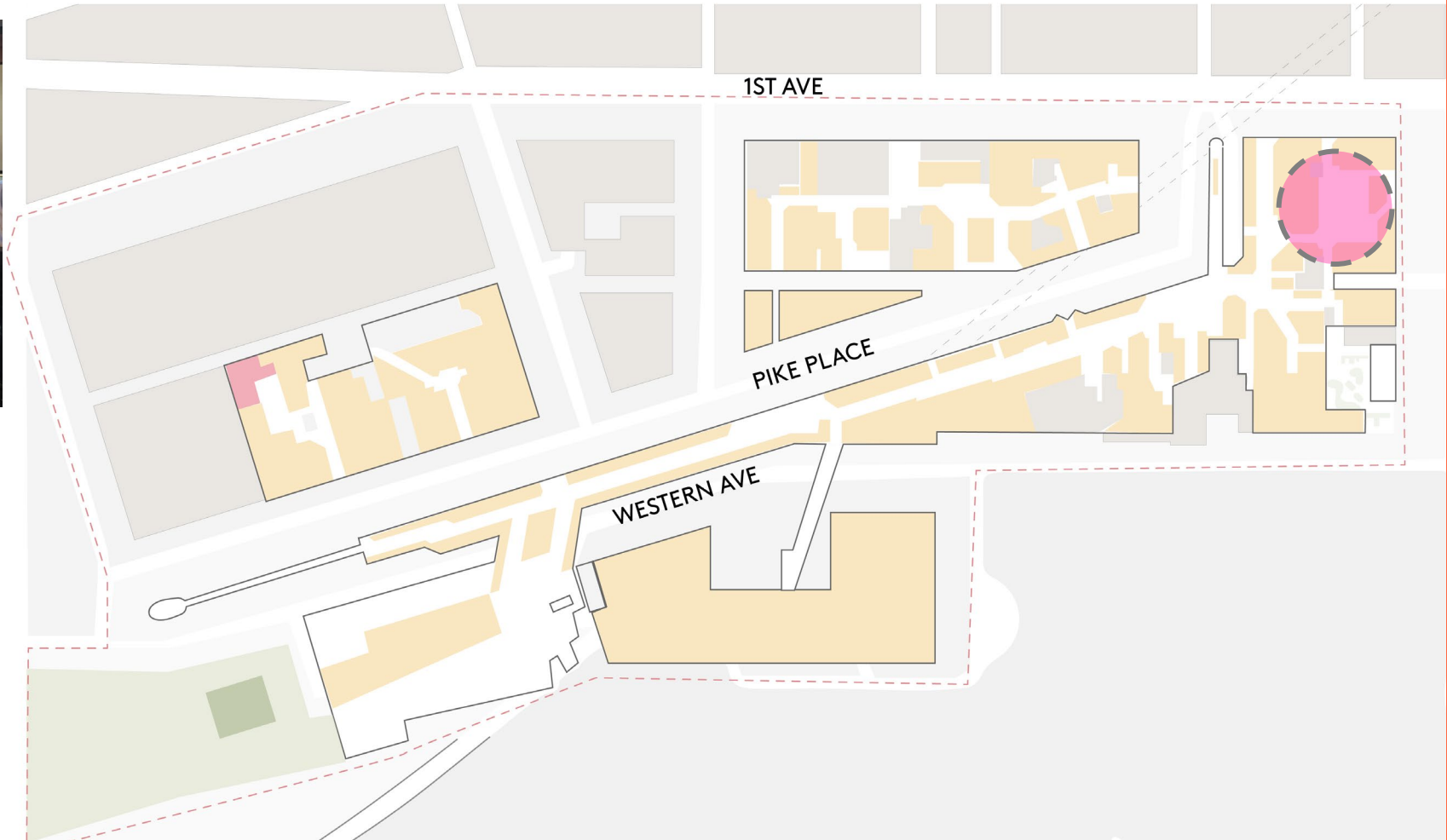
A Food Life Strategy for PPM: Soames Dunn Courtyard



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?

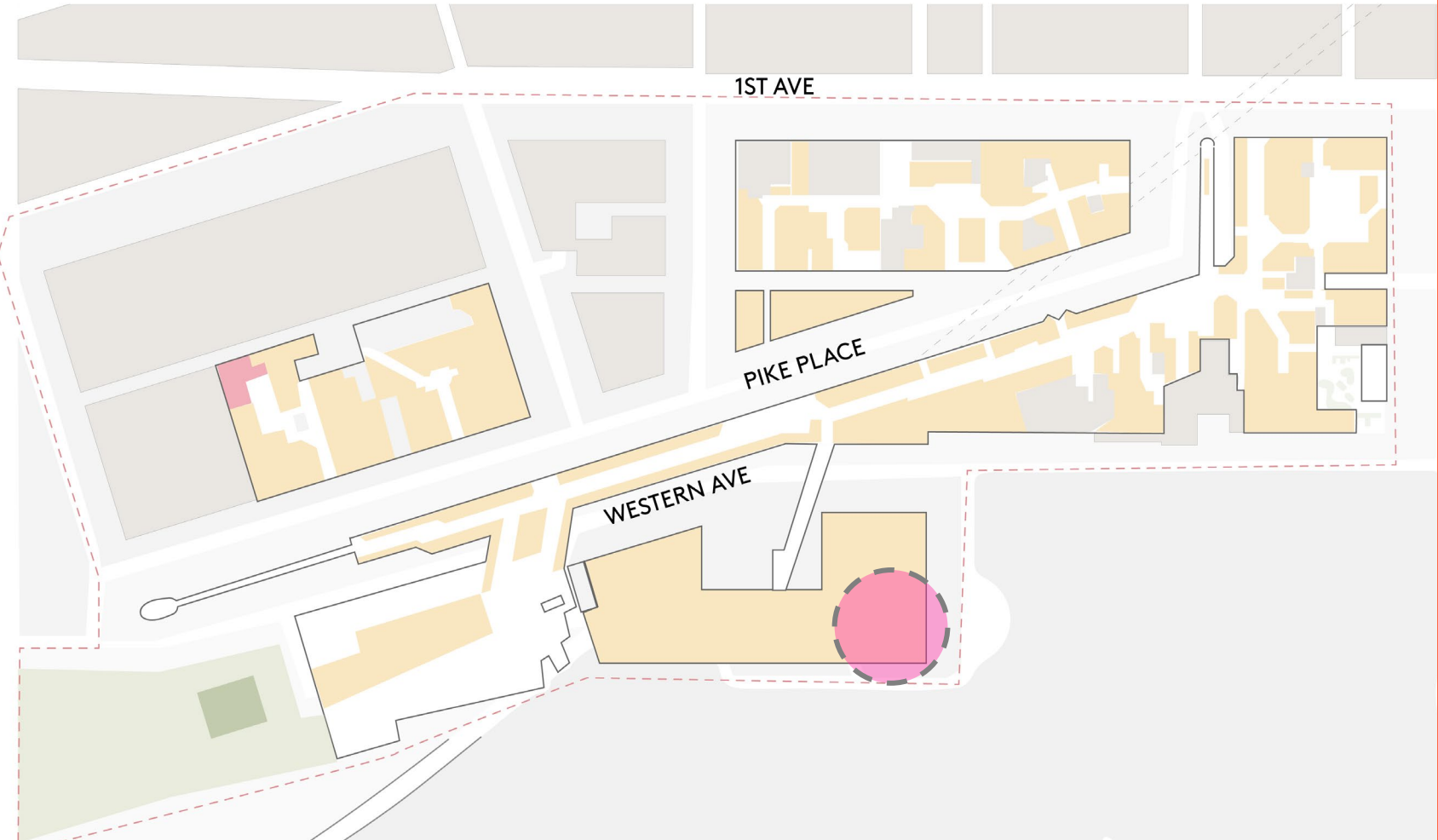
A Food Life Strategy for PPM: Economy Market Atrium



What if we...

- Created more direct engagement between seating and adjacent retail spaces?
- Considered noise reduction strategies?
- Opened up the connection to 1st Ave?

A Food Life Strategy for PPM: Parking Garage / Waterfront Connection



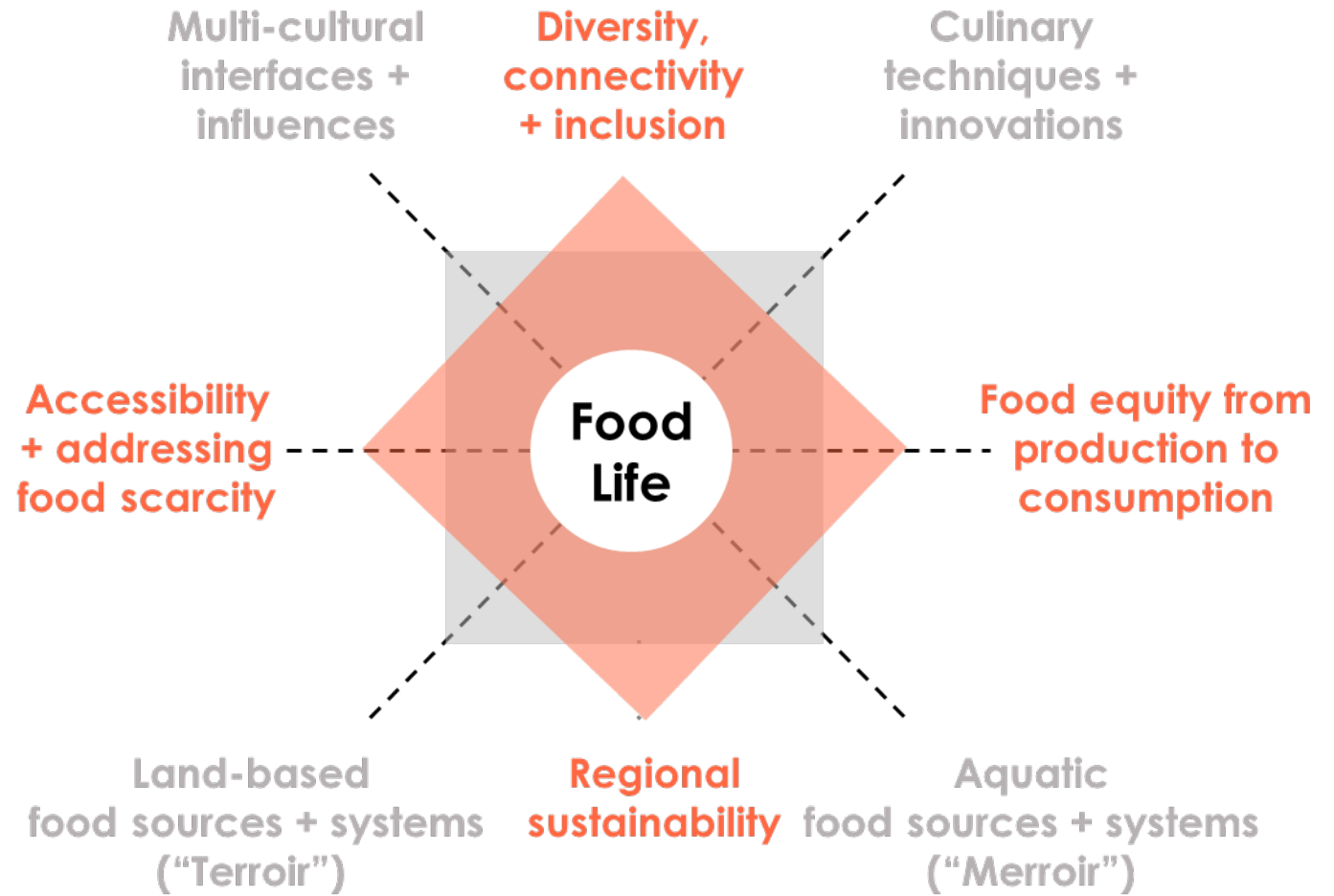
What if we...

- 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?



■ Social impact

■ Regional Assets 23

Not adopting Food Life as a 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

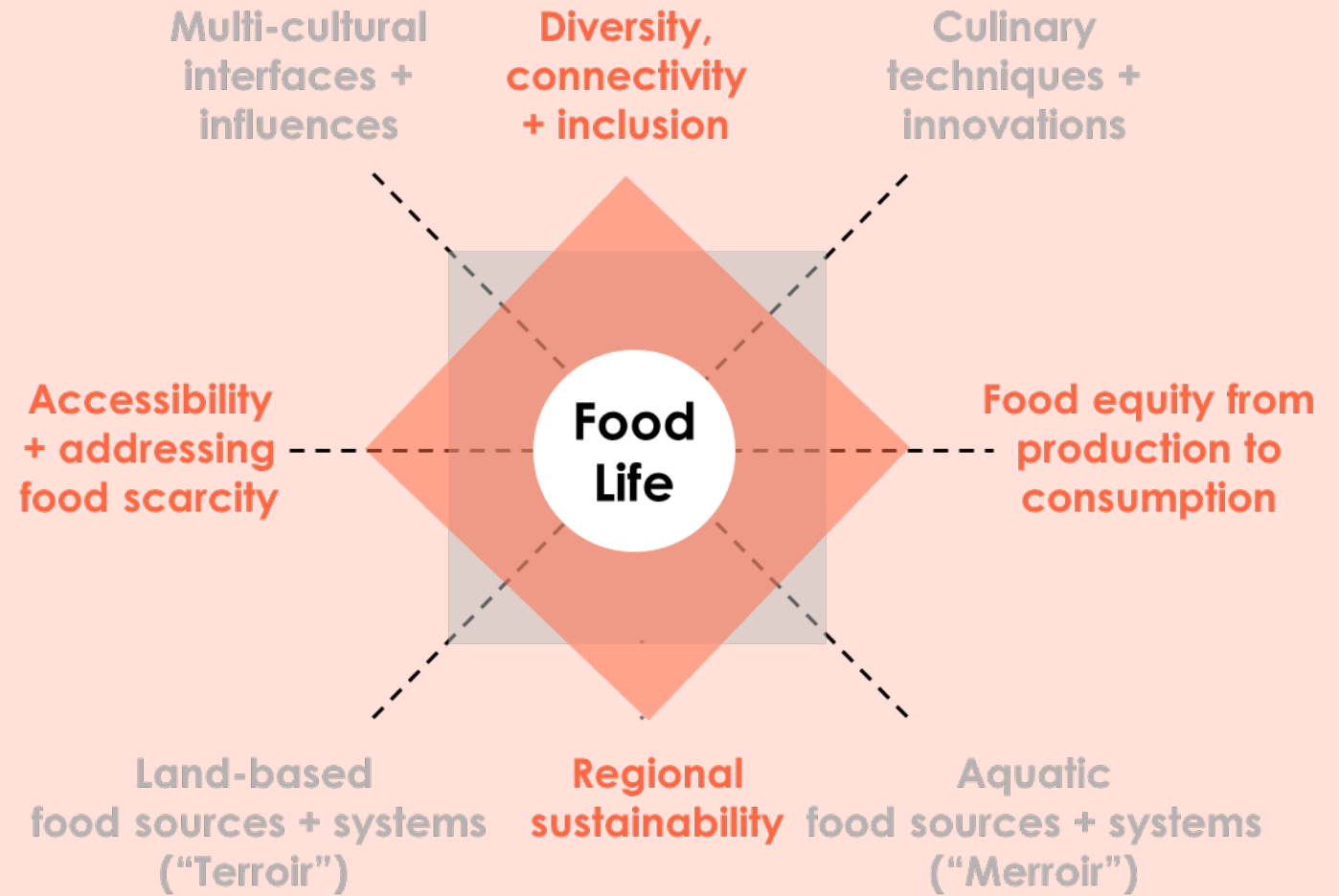
- Physical upgrades to accommodate more food uses and programming
- Subsidy to support and retain farmers
- Capacity to curate, recruit, support, and advocate for more food merchants and manage new programming



Discussion:

As of now, do you agree that Food Life is a **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?



■ Social impact

■ Regional Assets

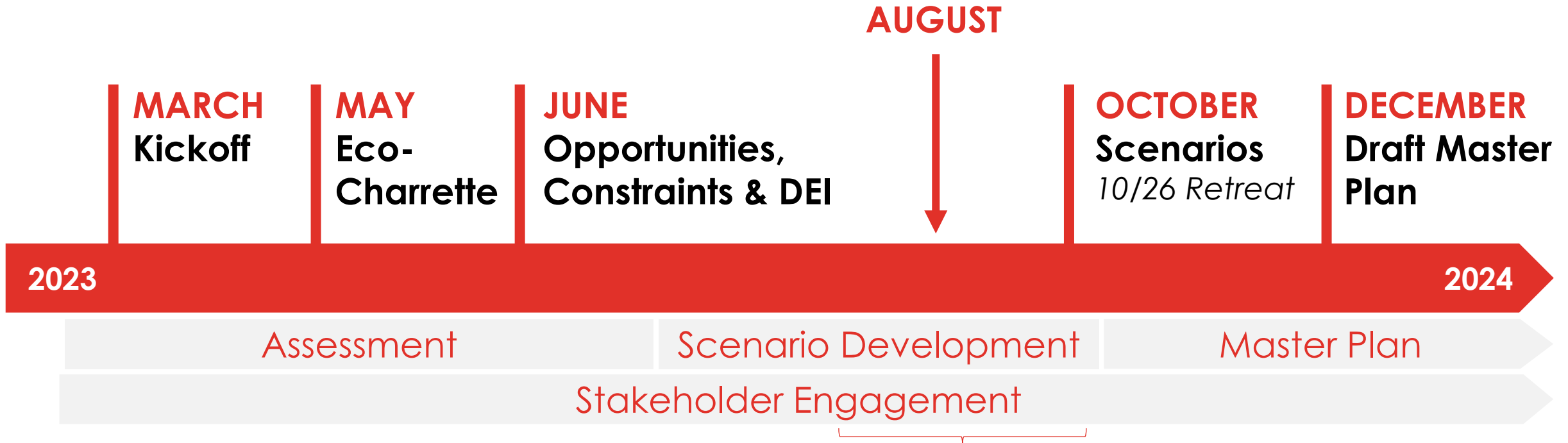
Appendix

Original Agenda

1. Defining Food Life
2. City Markets as Regional Centers of Food Life
3. Pike Place Market as a Food Life Nexus
4. Defining a Food Life Strategy + Discussion



Master Plan Timeline



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

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

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

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 multi-cultural diversity
- Desire for greater synergies between food life & farmers/other retail

Emerging theme of food life as a core focus

TODAY:

- Definition of Food Life
- Food Life in other city markets
- Food Life Strategy for PPM

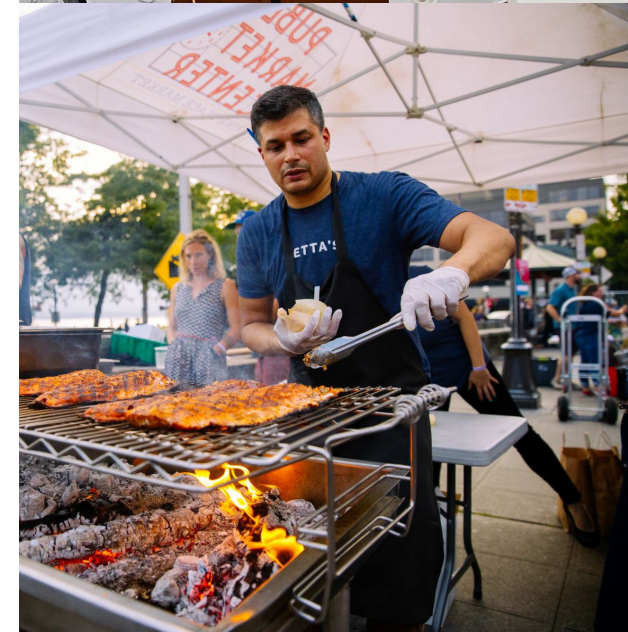
MRA
Strategic Positioning Analysis
+
Physical Analysis
+
Case Studies
+
Financial Analysis

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

Master Plan

Defining Food Life: Pacific Northwest Culinary Culture

- 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**.



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



Markets as Centers of Food Life: St. Lawrence Market, Toronto

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.



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

