

PIKE PLACE MARKET MASTER PLAN

DRAFT – 12/21/2023

NOTE: Throughout this document, notes highlighted in gray are used to explain what has changed since the outline was presented to Council, as well as to indicate placeholders for content yet to come.

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FOREWORD

[PLACEHOLDER FOR MARY BACARELLA AND DEVIN MCCOMB]

ACKNOWLEDGEMENTS

[PLACEHOLDER]

INTRODUCTION

[Edits: added detail]

Background

Over the course of 116 years, Pike Place Market (the Market) has continuously adapted to a changing world. With each major economic shock, social movement, and cultural shift, the Market has added to its initial mission as an affordable farmers' market and grocery center to, as of this writing, include a large residential community, community center, food bank, business incubator, restaurants and retail establishments, craft market, buskers, a childcare and preschool center, and more.

The Market has grown physically as well as in terms of mission. In the generations before the Market was established in 1907, the Duwamish people and Coast Salish stewarded the location. When Pike Place Market was established, producers sold goods directly to the public in a physical environment that was functional, flexible, and adaptable – open outdoor space where carts, horses, cars, and people mixed in delightful level of sensory cacophony. In its first 50 years, the Market expanded into a thriving centerpiece of Seattle, growing to 14 buildings on 9 acres, and then declined into disrepair.

As the Market environment deteriorated in the 1960s, calls for demolition and urban renewal arose. In response, a historic district was created in 1971 to protect and preserve not only the physical Market but also the uses – food vendors, farmers, crafters, and small shops, by and large family run businesses running in a cash economy – that defined the function and experience of the Market. This parallel strategy of curation of uses in tandem with adaptation of the physical environment is core to how Pike Place Market has adapted over time.

The activism that saved the Market was led by Friends of the Market, which remains a strong advocate for the Market's social mission to this day. The Pike Place Market Preservation & Development Authority (PDA), established in 1973, created a new management structure for the Market. Since then, the PDA and its 12 Council members have stewarded the preservation and development goals of the Market according to the values and mandates set forth in the Charter and Historic District while adapting to the Market's changing context.

Over the 50 years since the Market was saved, the challenge has been to resurrect the Market's role as a food center for Seattle, using preservation to provide an economic center for downtown Seattle and highlight the Market's unique and local identity. This required a parallel strategy of "preservation and development," a rebuilding of the "traditional mix of use" in tandem with reinvestment in the physical environment. Within the first decade of the creation of the historic district, the amount of retail space and number of businesses tripled, the residential population went from 0 to over 500, a community network of social services was established, and the PDA established a profitable track record.

The Market has weathered many crises since. Most recently, the Market had to adapt in the face of the COVID-19 pandemic, adopting new strategies to serve as a lifeline to its vendors. The PDA gave \$3.8M in rent credits over the course of almost 16 months, digging into its operating reserves and halting all capital projects, while launching funds and programming to help its vendors stay in business.

The next 50 years begins with a new set of challenges requiring strategic tenant curation and capital investment. Unlike 50 years ago, when the need was to resuscitate a beloved institution fallen on hard times,

today's challenge is to keep the Market relevant in a vastly changed economic and technological environment, while keeping it a "people place" where social interactions are as important as ever.

As we look to the next 50 years, we must continue to steward the Market, staying true to its history and mission while adapting to a changing world to ensure its long-term financial sustainability.

The Market must adapt to rapidly changing external forces, many positive, others not. While farmers continue to sell at the Market, macro-economic pressures on agriculture have resulted in a decline in their presence: farm attendance in 2022 was at 69% of pre-pandemic levels. Commercial tenants – restaurants, food purveyors, and retailers – and crafters face an ever-changing retail environment increasingly focused on delivery, online shopping, and rapidly shifting consumer preferences. Yet there are also opportunities to leverage growing consumer interest in unique, local food experiences and immense opportunity for the Market to position itself as a hub for multicultural Food Life that reinvigorates the "Meet the Producer" ethos through curation of local and regional food products. Seattle's downtown is facing a post-pandemic crisis, with a dramatic loss of workers, higher office and retail vacancies, and increased crime. However, it also features a rapidly growing residential population, with a 71% increase in residents since 2010 that could be served by the Market. Further, the Waterfront Park, slated to open in 2025, is projected to bring 1.5M new visitors to the area,¹ and the Market is strategically placed as a physical connector between downtown and the waterfront. The Market has an opportunity to become a stronger advocate in the community and a stronger voice in local government decisions that have an impact on the Market and the surrounding downtown. This is the time for us to actively seek and engage with community partners who can participate and support this mission.

The Market is also facing operational challenges. Rapidly rising operating costs – outpacing increases in revenues – pose a threat to the long-term sustainability of the Market. Although these cost increases can be mitigated in the short- to medium-term with rent increases, other responses are needed to ensure resilience in the face of the unpredictable and to make the major capital investments identified in this Master Plan. The Market receives no operating funds from the City, and all operating expenses must be covered by rents and parking fees. The top 20% of commercial tenants – which include restaurants, food vendors, and retailers that make over \$1M in annual sales – generate 72% of sales, while the bottom 50%, making less than \$300K, represent 8% of total sales. There is a "missing middle" of tenants that must be grown through curation and reattraction of local spending. Yet seismic changes in consumer and retail behavior, accelerated by the pandemic, have created challenges for visitation to the Market and the financial health of Market businesses. The rise of online retail and delivery, increasing emphasis on experiential retail, incorporation of augmented reality (AR) and other technologies into visitor experiences are all trends the Market must acknowledge and should respond to as consumer patterns in a changing economy where expenditures on "dining out" now exceed those for "preparing meals at home." And while the Market's origins are as a beloved local community institution, it is increasingly dependent on revenue from out-of-town visitors, highlighting a need to ensure its offerings can reattract Seattle region residents. Finally, the Market's physical buildings are expensive to maintain, present considerable challenges with accessibility and infrastructure, and have room for improvement on environmental sustainability and visitor and vendor experience.

As a historic hub for immigrant farmers and diverse entrepreneurs, and as a longtime home for social services and affordable housing, if the Market is to retain and expand our engagement with local shoppers, **we must double down on our DEI commitments**, particularly in the face of rising income inequality in the region. The Master Plan offers opportunities to build on the Market's strategic planning work to date in order to embed DEI across our community, including PDA and PDA Council leadership, merchants, workers, residents, social service providers and recipients, and visitors. With our mission of social impact – and as home to the Pike Place Market

¹ *Friends of Waterfront Seattle*

Foundation, the Five Families (Food Bank, Preschool, Neighborcare Clinic, Pike Market Senior Center, Heritage House Assisted Living), and affordable housing – the Market must grapple with how Seattle’s social service and affordable housing needs are growing, exacerbated by Seattle’s rapidly rising cost of living.

Recognizing the need for the Market to proactively respond and act on these opportunities and challenges, the PDA launched a yearlong effort to develop this Master Plan.

Master Plan Process

In 2019, the PDA Council voted to develop a Master Plan to ensure the long-term sustainability of the Market. This process was halted during the COVID-19 pandemic and restarted in 2022, with the release of a Request for Qualification (RFQ) in the spring to select a consultant to lead the planning process.

The RFQ process resulted in the selection of HR&A Advisors, an industry leader in economic development, real estate, and public policy consulting, equipped with a unique understanding of the intersection of public and private sectors. HR&A assembled a project team that included BERK Consulting, Mithun, and MRA International. More details on the consultants and selection process can be found in the appendix.

During our November 2022 retreat, the PDA Council established parameters for a Master Plan to guide decisions on preservation, development, and use of assets over the next generations. The Council crafted a scope of work that considers the Market holistically across its business operations, physical plant, civic engagement, financing models, and management on a 10-year active planning horizon and 50-year vision horizon.

Public Outreach

The master planning process was grounded in stakeholder engagement to ensure that the Master Plan was informed by institutional knowledge and on-the-ground, diverse perspectives on opportunities and challenges. The stakeholder engagement activities were guided by a Public Engagement Plan that outlined objectives including the importance of providing information and transparency throughout the process. Public engagement included:

- 54 interviews with neighboring institutions, non-profit organizations, tenants at the Market, and other stakeholders
- Open House event, introducing the Master Plan process.
- Coffee and Donuts Event for Tenants
- Discussion groups with Friends of the Market, Market Constituency, and the Five Families
- Conversations with Market Historical Commission
- Two Summer BBQs for Market Residents
- PDA External Community Survey (2,365 responses)
- PDA Internal Market Community Survey (372 responses)

PDA Council Meetings

The PDA Council met frequently over the course of the year. Presentations at each of these meetings are included in an appendix. These meetings included:

- Master Plan Project Kickoff (March 30, 2023)
- Eco-Charrette Workshop (May 25, 2023)
- Opportunities, Constraints, and DEI Discussion (June 29, 2023)

- Food Life Follow-Up Discussion (July 27, 2023)
- Social Services & Community Steward Discussion (August 17, 2023)
- The Market as Food Life Nexus (August 23, 2023)
- The Market as Food Life Nexus (August 31, 2023)
- Sustainability Action Plan Update & Physical Analysis (September 14, 2023)
- DEI discussion (September 21, 2023)
- The Market as Small Business Hub (September 28, 2023)
- The Market as Downtown Anchor and Workshop Preview (October 18, 2023)
- Scenario Workshop (October 26, 2023)
- Financial Analysis and Draft Master Plan (December 21, 2023)
- [January-March meeting agendas and dates to be confirmed]

VISION & GOALS

[Edits: Added detail, increased emphasis on Food Life and Meet the Producer and Market's DEI legacy]

Pike Place Market's 50-Year Vision and Goals

Pike Place Market will always be central to the identity of Seattle. Our vision for the next 50 years is consistent with the purpose of the PDA set by the Charter 50 years ago.

Fifty years from now, we envision Pike Place Market as a thriving hub of Pacific Northwest food, culture, and commerce. The Market will continue to celebrate its "Meet the Producer" mission – valuing face-to-face interactions between customers and producers, artists, makers, and farmers – and embrace "Food Life," fostering a culinary culture with local authenticity and destination appeal, built on a sustainable Pacific Northwest food system that extends from the producer to the consumer. The Market will maintain its authentic character as a hub for local entrepreneurship, with an increased orientation towards a local audience, amplified social impact and citywide presence, and demonstrated leadership on diversity, equity, and inclusion.

We will know we have achieved this vision when the Market is operating on a long-term financially sustainable basis, driven by the success of our community of local entrepreneurs; when we can point to sustained, significantly increased patronage of the Market by downtown residents and workers, Seattle residents, and residents of the region; and when there are DEI outcomes across the Market's organizational structure and culture that are regularly measured, examined, and acted upon.

- **Ensuring long-term financial sustainability** means that revenues generate an adequate margin for a strong operating reserve and a modest capital maintenance and improvement fund, as well as permit decreased reliance on referenda to make major capital investments.
- **Increasing local visitation** requires curating the Market's tenancy to ensure a mix of businesses that are primarily of interest to locals and attract tourists by virtue of their local authenticity.
- **Advancing a diverse, equitable, and inclusive Market** requires establishing a shared definition of DEI, and institutionalizing it across PDA Council & staff, Market businesses, Market residents, and visitors. This will build on the Market's rich history of diverse vendors and social impact.

This Master Plan is a roadmap to achieving our vision and realizing its goals. It provides an approach to reinvestment in the Market that can be achieved by 2033, and through regular revisitation of goals and adaptation to changing conditions, guides the Market for generations to come.

Diversity, Equity, and Inclusion (DEI) at Pike Place Market

The Market has long celebrated diversity and equity, through its rich history of immigrant entrepreneurs and its deep social impact through provision of affordable housing and social services. In 2023, the PDA drafted a working document on the Market's strategic goals for DEI, establishing that the Market aims to create a diverse and inclusive work environment for PDA staff members to ensure that the way it engages tenants and community is grounded in equity. The Market seeks to support Black, Indigenous and People of Color (BIPOC) through all lines of engagement and provision of access to opportunity and resources. DEI will be

considered in management and non-management staff positions, tenant selection, consultants, contractors, marketing, and programming. The PDA plans to measure and review the strategy on an ongoing basis.

The Master Plan builds on this effort, which ran in parallel to master planning. Strategies contained in this Master Plan embed DEI, using this definition:

- **Diversity:** *representation of people who have a variety of differences and identities (e.g., race, ethnicity, gender, disability, sexual orientation, country of origin, etc.)*
- **Equity:** *equality of economic opportunity; fairness of access to information, resources, and physical space; and fair treatment for all – with a focus on taking cognizance of past practices and their embedded effects while actively reducing disparities.*
- **Inclusion:** *actively inviting all people to visit, engage with, and participate in the Market.*

STRATEGIES & ACTIONS

[Reorganized with a new "Partnerships" section and "Implementation" section]

The Master Plan strategies are organized into three categories:

- 1. Food life curation and programming to reattract locals and help businesses thrive:** Curate Market businesses and experiences that facilitate "Meet the Producer," embody the Market's mission as a hub for Pacific Northwest Food Life, and support diverse, equitable, and inclusive local entrepreneurship. This will attract greater local visitation and increase revenues, driving financial sustainability for the Market's diverse businesses, as well as the Market itself.
- 2. Physical Investments to support economic performance, inclusivity, space capacity, downtown/waterfront connectivity, and delightful public space:** Make physical investments that improve wayfinding, accessibility, and circulation; drive foot traffic to under visited spaces; increase programmable gathering spaces; and improve the Market's environmental sustainability.
- 3. Partnerships to amplify the Market as the Soul of Seattle.** Revisit and renew strategic partnership to build on the Market's longtime social mission and address emerging challenges.

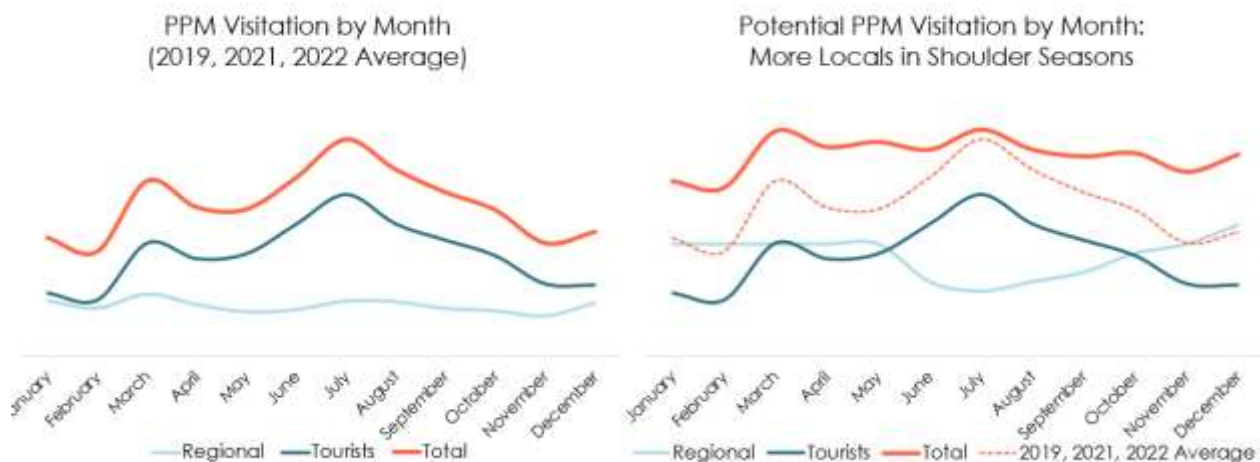
1. Food life curation and programming to reattract locals and help businesses thrive

[Edits: Emphasis on Food Life; more strategies for farmers; more discussion of crafters; consolidation of strategies; community input; data; additional detail overall]

The curation of tenants and programming to strengthen the Market as an iconic hub of Pacific Northwest Food Life and help businesses thrive is critical to reattracting locals, embracing authentic "Meet the Producer" experiences, advancing DEI, and bolstering financial sustainability.

While the Market is a beloved Seattle institution, its visitors increasingly skew towards tourists. Cell phone data suggests that only one in four visitors to the Market lives in the Seattle region.² When increasingly dominated by tourists, destinations can lose their feeling of authenticity, a concern identified in outreach for the Master Plan. The Market must reattract locals, thereby preserving authenticity and the Market's status as a community gathering place while increasing revenues to vendors and the Market. The Market can also strategically cater to the rapidly growing downtown residential population, which has increased by 71% since 2010, with 18,000 new housing units built during that time frame.³

Reattraction of locals also has a seasonal component. During high season – from May to September – parts of the Market can be overcrowded, which, locals say, deters them from visiting. We can increase revenues by leveraging seasonal events and food offerings to increase local visitation in the shoulder seasons, "smoothing the curve" of visitation.



² Near, HR&A Analysis (2023)

³ Downtown Seattle Association (DSA) 2022 Report Card. The DSA defines Downtown as the neighborhoods of Uptown, South Lake Union, Denny Triangle, West Capitol Hill, Belltown, Waterfront, West Edge, Retail Core, First Hill, Pioneer Square, Chinatown-International District, and Sodo. City of Seattle Residential Unit Types and Sizes Dashboard (2022). Downtown Activation Plan (2023).

What We Heard: Internal Market Survey

Two of the top three issues the Master Plan should focus on were ensuring the Market's current **mix of food, craft, farm, and retail offerings** is attractive to locals (40%) and ensuring the Market attracts the right **balance of locals and tourists** (34%).

*"Commercially, sustainability depends on being relevant to a local audience. **Seattleites love the market, but most don't shop here**, primarily because of the perception that it's overrun with tourists and caters to them, not to locals."*

What We Heard: External Community Survey

Top 3 offerings that regional residents said would **encourage them to visit more often**:

- Locals-oriented days or discounts for Seattle residents (60%)
- More food-related events like food fairs and night markups (54%)
- After-work activities like happy hours (45%)

Reattract locals by embracing Pacific Northwest Food Life

Embracing Pacific Northwest Food Life can help the Market achieve our goals of ensuring long-term financial sustainability, reattracting locals, and embracing DEI, while also rebuilding the presence of farmers at the Market. The Pacific Northwest is a Food Life cornucopia, with rich land-based produce and bountiful sea-based foods - fish, crustacea, mollusks and shellfish. Multi-cultural influences include Native American, Scandinavian, Irish, Mexican, Southern Black, 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.

The Market 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; the Market is the only entity with the capacity, legacy, and competence to advance this opportunity in full. As a Food Life hub, the Market can reattract locals while continuing to attract tourists based on their respective preferences:

Locals seek out food experiences that tend to be casual, affordable, and distinctive in social environments – e.g., “food as social engagement and community hubs.” At public markets, they seek out goods that are not generally available elsewhere, based on quality, diversity, and service. Tourists tend to seek out food experiences that are unique, entertaining, and memorable – “food as experience and destination attraction.”

A review of 22 public markets⁴ identified best practices for positioning markets as Food Life destinations and local community hubs:

1. Committing to refining **tenant curation** processes
2. Addressing **shifts in dining patterns** across all market segments

⁴ Avanti F&B Incubator, Borough Market, Cours Saleya, Granville Island Market, La Boqueria, LA Grand Central Market, LA Farmers Market, Markthalhe, Markthal, Marche des Enfants, Mercado Ribera, New Sydney Fish Market, Oxbow Market & Copia, Ponce City Market, Reading Terminal Market, San Miguel Market, SF Terminal Market, St. Lawrence Market, Torvehallerne Market, Toyosu Market, Trinity Grove, Westside Market.

3. Creating offerings and environments which support **local connectivity**.
4. Targeting Food Life experiences which are **unique to the region** and draw (local?) visitors.
5. Leveraging events **programming and vibrancy** as a key function
6. Developing approaches to supporting **producer participation** in the Market
7. Fostering **partnership relationships** to advance goals

To apply those international best practices, we should:

- Actively recruit and curate businesses according to a set of annual and multi-year tenant curation objectives that are guided by the Meet the Producer and Food Life ethos. Among these objectives should be increasing the “missing middle” of tenants – those that make more than \$300K and less than \$1M. Priority targets for attraction should include: **authentic Pacific Northwest food products, dining concepts, producers, and experiences** to diversify food offerings (such as foraged produce, spices, culinary tools, or farm to table prepared products); **BIPOC businesses** representative of the Pacific Northwest’s rich cultural and ethnic mix; and a modest, **defined number of pre-existing, local independent businesses** who can serve as Market anchors supporting other vendors while acting as revenue generators for the Market community.
- Create **Market zones that facilitate visitor itineraries** through unique Food Life experiences – such as food stands, alleys, restaurant clusters, demo spaces, etc. – that support both a range of “experiential journeys,” discovery, and storytelling about the Market’s vendors and labyrinthine physical spaces. Examples of potential themes include heritage bakeries, Washington wineries, First Nations cuisine, or a CIA-Seattle coffee & chocolate roastery. This should also include creating **temporary, pop-up, and shared spaces** to facilitate small business incubation and testing of different concepts.
- Develop a coordinated set of strategies to support **farmers’ financial sustainability** and increase their presence at the Market. This should include increasing the presence of **value-added prepared foods** and events centered on **seasonal harvests of regional crops** – such as an apple festival with cider tasting and apple pie competitions, or a taste of Washington cheese, wine and compote festival. The Market can expand the **PIKE BOX CSA**, potentially through additional catalogue narratives featuring participating producers, a subscription program with enhanced delivery, cruise ship boxes as passenger gifts purchased by cruise companies or adding a physical presence at an existing Market retail operation to expand reach. The Market can incubate produce farmers for daystalls at the Market’s satellite farmer’s markets and can incentivize more Market restaurants to **procure seasonal food products from producers** at the Market and in the region, with “Sourced by Pike Place Market” or “Sourced in Washington State” labels on packaging and menus. Throughout these strategies, proactively recruit and highlight **BIPOC farmers**.
- Curating the vendor mix will happen over years as new spaces become available, but **sponsored events, programs, and farmers markets** that spotlight the Market’s Food Life identity can launch quickly. Events can allow near-term experimentation to increase local and regional visitors year-round to fill “shoulder seasons.” For instance, we should:
 - Coordinate with food and restaurant businesses to identify opportunities to extend business hours in order to **create an evening destination** that attracts more visitors throughout the day.
 - Create signature **Food Life-focused Market events** – centered on Market vendors, producers, crafters, buskers, etc. – targeting Seattle locals and regional residents, particularly outside of the summer high season. The Market can secure sponsorships to support mission-driven programming initiatives undertaken by the Market – for example, to promote Native American food life and culture, or agricultural sustainability focused on promoting regenerative farming and life cycle management practices across the region.

- Adopt technologies that can provide revenue-generating, customizable visitor journeys, such as apps that provide **augmented reality (AR) experiences** of wayfinding, guided tours, and vendor profiles for a small fee.

Throughout implementation, embracing DEI and increasing the presence of BIPOC vendors at the Market should be a continual mission. Food Life can increase the frequency and duration of local visitation, thereby increasing overall visitor spending, critical to making the Market more financially sustainable.

What We Heard: Internal Market Survey

*"I feel that the **evening and late-night opportunities for the market are huge**. I manage a restaurant in the Market, and the only reason we stop seating at 9pm is that there is not strong enough foot traffic to support late night business."*

What We Heard: External Community Survey

Top 3 reasons King County residents say they visit the Market:

- To eat meals, snacks, or beverages (78%)
- To bring out-of-town friends or family when they visit (69%)
- To buy food items such as groceries for myself or others (57%)

Support small businesses to advance wealth building and support greater financial sustainability for them and the Market

Helping small businesses grow and thrive is core to the Market's mission. As stated in the Market's Leasing Guidelines, *"The PDA provides opportunity for the incubation of small businesses. The PDA can offer opportunity to new, small businesses with lower rental terms and smaller spaces than what might be offered in other areas of the downtown. The PDA seeks to work with commercial tenants to identify opportunities for their business to become viable and to succeed."*

Based on outreach and best practices from business incubators and accelerators from across the country, the Market can embrace a number of actions to reinforce our support for small businesses' vitality and growth – with dedicated support specifically for BIPOC businesses. These strategies should grow the "missing middle" and reduce the share of vendors – currently 50% – that generate revenues below \$300K per year. Growing vendors' revenues will, in turn, generate greater revenues to the PDA – reflecting vendors' and the PDA's shared responsibility for financial sustainability. We should:

- Create **shared infrastructure** to address common business needs identified through Master Plan outreach, including break rooms that workers highlighted were sorely needed, public WiFi and/or WiFi for businesses, and Market-branded containers/cutlery to support takeout business while promoting affiliation with the Market. We can standardize point-of-sale (POS) system(s) to streamline business operations and PDA rent generation. We can also launch a shared food delivery service to increase vendor revenues from locals, generating additional PDA revenues through percentage rent and delivery fees, in tandem with creating a shared food production and aggregation space.
- Identify business challenges and **partner with incubator and accelerator organizations who can offer resources to help new and legacy vendors to sustain and grow**. While the PDA offers technical assistance today, uptake is limited; this process should begin with an assessment of why PDA services are

not better used and whether partnering with another organization that specializes in these services could have a greater reach. Training and technical assistance support – supported jointly by tenants and the Market – could include technology adoption, marketing and branding, and business operations, and helping legacy businesses with succession planning.

- Partner with **BIPOC community and business organizations** to create a streamlined pipeline for diverse businesses to apply to enter the Market. Further, we can partner with **local incubator/accelerator programs focused on BIPOC businesses**, such as the Seattle Food Innovation Network, Seattle Made, and/or the Food Business Resource Center WA Food & Farm Incubator, to provide targeted business support programming for BIPOC entrepreneurs, who often face greater systemic barriers to starting up and scaling businesses.
- Help **crafters to grow their businesses**, including by creating pathways for growing into brick-and-mortar spaces at the Market. Some crafters highlighted that stringent rules on attendance, production, and materials – while preserving the character of the Market – would allow them to more easily scale if modestly loosened.
- Facilitate the reestablishment of a **merchants' association** or other community building mechanisms for mentorship and partnerships between new and existing businesses. During outreach, businesses stated that they felt that vendors would benefit from stronger infrastructure to build community, share resources and information, and troubleshoot business issues.

What We Heard: Internal Market Survey

*"It would be amazing if the Market had a **small business liaison** that could help market businesses & permit holders navigate things like taxes, health insurance, etc."*

*"It would be great to have **business coaching** or peer-based coaching to help our businesses thrive."*

*"Very, very few businesses ever leave the craft line... [We need] more opportunities to learn next steps - maybe a class or meetings with the retail rental persons at the Market about available space and **what the leap to retail would look like**."*

*"Offer **retail sales consultations** to improve on marketing strategies, product offerings, customer outreach, grants to improve on business development and improvements."*

2. Physical investments to support economic performance, inclusivity, space capacity, downtown/waterfront connectivity, and delightful public space

[edits: additional detail, updated drawings]

Strategic physical investments are needed to achieve the Master Plan's goals of ensuring long-term financial sustainability, increasing local visitation, and advancing a diverse, equitable, and inclusive Market.

The approach to investments described here follows five guiding principles to respect and reinforce the vitality, history, and future of the Market:

- Facilitate strong economic performance.
- Be inclusive for all.
- Respond to the remaking of Downtown and the waterfront.
- Grow program capacity.
- Expand on seasonal and delightful public spaces.

These guiding principles inform the Market's tactical investment priorities. For instance, an inclusive Market that also wants to facilitate strong economic performance must improve the visitor experiences by alleviating crowding and adding seating and public spaces. A Market that is responsive to adjacent conditions and that wants to facilitate strong economic performance must drive foot traffic to under-visited areas. The Master Plan's approach to supporting the Market's physical environment focuses on a foundation of on-going maintenance and repairs in parallel with targeted investments in three priority areas or zones that have a distinct character, potential and needs. These zones are Western Avenue, First Avenue, and Pike Place. They are shown in the diagram and described below.

Western Avenue: The environment surrounding Western Avenue is changing. The waterfront's transformation will result in significant foot traffic between that destination and the Market. However, today, businesses in the DownUnder and along Western Avenue receive lower foot traffic and see significantly lower average sales per square foot compared to businesses in more prominent locations. The new Overlook Walk, when completed, will create a direct connection between the waterfront and the PPM's properties. It has the potential to become a second "front door" to the Market. The redevelopment, repair, and/or renovation of Heritage House atop the Market garage is a significant opportunity to expand on this adjacency and increase the Market's presence as it responds to changes on the waterfront. This area also holds the potential for new program spaces that could help draw visitors down from the upper levels and through the DownUnder.

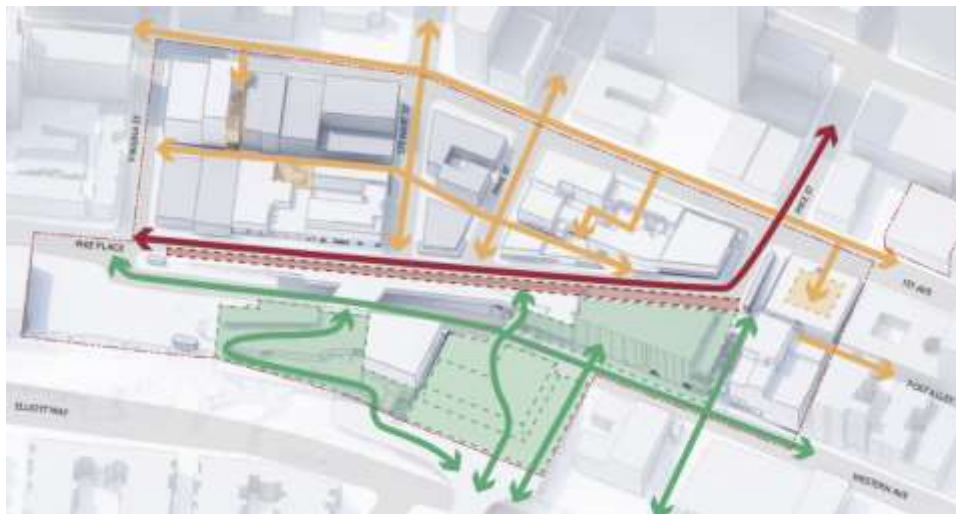
First Avenue: The Market's traditional entry has always been located at First Avenue and Pike Place where the Market's famous "Public Market Center" sign is located. Increasing entry points could distribute people entering the Market, reducing the sense of crowding and better dispersing foot traffic – particularly from downtown residents and office workers – among shops. This area is defined by its relationship to the city street grid as it meets the waterfront edge. It also contains many of the identified historic buildings that contribute to the Market's landmark status. Strengthening the hidden courtyards, alleys, and sense of discovery of this portion of the street grid will help distribute visitors and increase retail viability.

Pike Place: Pike Place, the street, has always served a wide range of uses. As the Market's "front porch," the street is often crowded with visitors and pedestrians. At the same time, it serves as a critical loading zone, emergency access, and throughway for the Market's businesses. Managing the street differently, under the

stewardship of the Market, can ensure that businesses can continue to use the street for critical business needs while also addressing crowding and pedestrian safety concerns.



Pike Place Market is one of three historic districts located downtown.



The Market can be thought of as three distinct experiences or zones, each having a distinctive character and context, each with a unique set of needs and opportunities (Orange: First Avenue, Red: Pike Place, Green: Western).

Invest in Western Avenue to improve connections to the waterfront and create more rentable and programmable space for mission-driven and revenue-driving activities

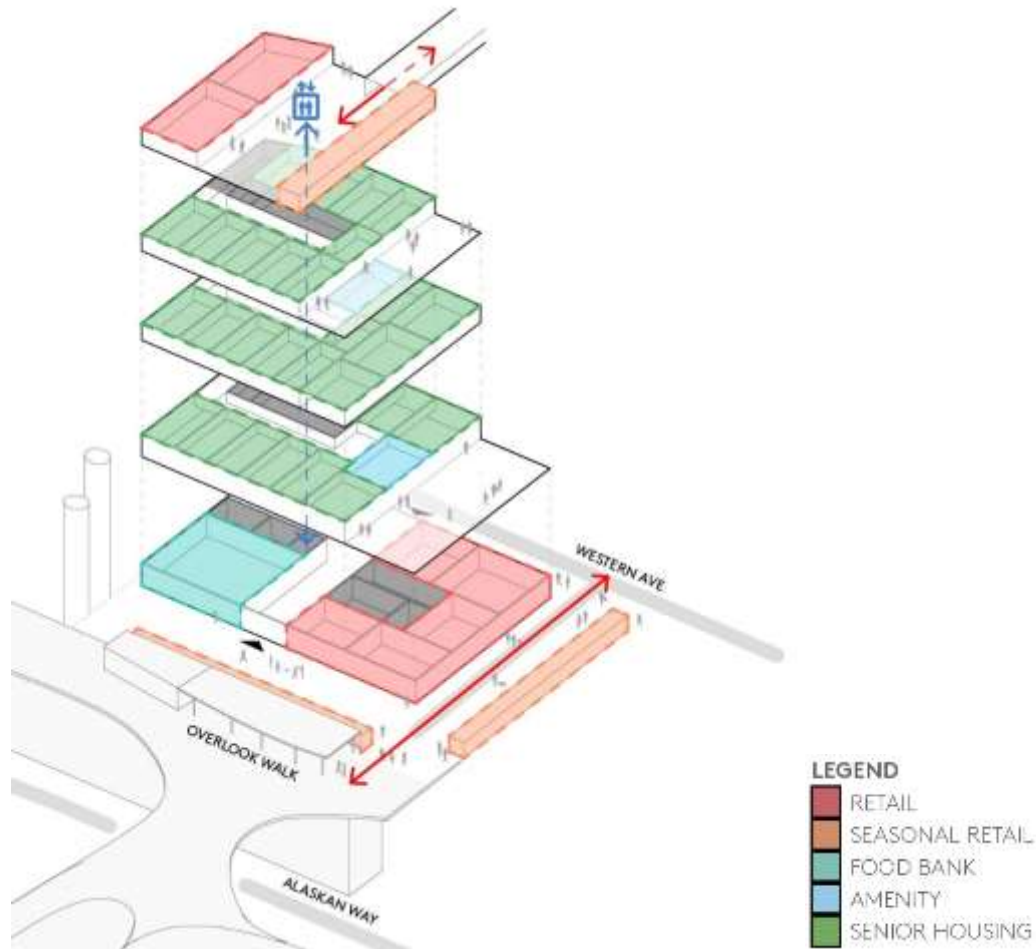
When the new Waterfront Park opens, the Market will be strategically located as a destination connector between the waterfront and downtown Seattle via the Overlook Walk, a pedestrian bridge that will cross over Alaskan Way. While this new piece of urban infrastructure will connect to the Market at the upper level through the MarketFront terrace, there is a second mid-level connection opportunity to Western Avenue via the Heritage House site that we should not overlook. Potential replacement or renovation of the set of wood-framed structures that sit on top of the existing garage could provide a significant opportunity to create a new, highly visible entry point on Western Avenue, to draw visitors up from the waterfront while creating more space

for mission-driven activities, programming, and commerce at this level and along a revitalized Western Avenue. Improvements to and energizing of Western could become a focal point for new retail or dining environments that can expand capacity and reach as the waterfront builds momentum. This would complete redevelopment along the waterfront edge of the Market, could provide purpose-built retail, social service, and program spaces, to help to provide more connections to and from adjacent under-visited areas outside of the historic core. Potential strategies to realize the potential of this area are:

- Create a **second “front door”** and improve the experience of arrival to the Market by expanding and enhancing the mid-level pedestrian connection between the Overlook Walk and Western Avenue. Leverage and build upon the already significant investment being made in the distinctive new pedestrian bridge by providing retail and pedestrian space at this mid-level zone.
- Highlight the **western façade of the Main Arcade** with visible vertical circulation and improved signage to increase visibility and wayfinding and create more dynamic views coming from west of the Market of the DownUnder spaces and amenities.
- Creating a **stronger ground-level experience and presence** on both sides of Western Avenue through public art and retail spaces, some of which could be located in the renovated or redeveloped Heritage House building, or on top of the existing garage.
- Explore ways to create improved assisted living facilities and more space for additional retail and community uses at **Heritage House** (the PC-1S site) through redevelopment. The existing building above the garage is in need of significant capital improvements to address needed maintenance updates. We can rethink this site in conjunction with our approach to Western Avenue and the DownUnder. A redevelopment could:
 - Include needed capital investments to or relocating the Food Bank to a more appropriate or practical location,
 - Create a more visible connection from Pine Street to the pedestrian bridge to the west,
 - Create a substantive public space between Western Avenue and the Overlook Walk from the waterfront,
 - Expand purpose-built retail space within the Heritage House building,
 - Build to the maximum lot line along Western Avenue and resolve vehicle access and unused spaces that currently break the retail experience along Western from the upper level,
 - Rebuild the pedestrian bridge to more visibly connect at upper levels of the Market to provide more retail, better views, access and wayfinding to the waterfront.
- At the MarketFront terrace, creating a covered connection between **Desimone Bridge and MarketFront** to increase usable, flexible, revenue-generating event and retail space while improving comfort for the artisans using the space.

What We Heard: Internal Market Survey

*“Start with having better signage in the MarketFront and elevators so that the **public realizes that Western Ave shops exist** and are a part of Pike Place Market.”*



DRAFT Concept Drawing: The Heritage House site could be redeveloped to maximize the potential of the site, providing a new home for mission-driven programs already there, in addition to new purpose-built retail, seasonal stalls and pedestrian connections to western and the waterfront.



DRAFT Concept Drawing: View of activated Overlook Walk connection from the Waterfront to the DownUnder

Improve access and circulation in the DownUnder to drive greater foot traffic in the DownUnder and along Western Avenue

The DownUnder is one of the most distinct spaces at the Market and exemplifies the feeling of discovery that visitors experience as they lose their way in the labyrinth of passages. However, because the DownUnder is difficult to find and to navigate, it has significantly less visitation and lower average sales per square foot than high-traffic areas such as Post Alley and the Arcade (\$450/SF vs. ~\$2,000/SF). There is an opportunity to improve parts of the DownUnder to draw more people into and through this unique retail experience, while still maintaining the 'hidden' nature of the space to create an authentic shopping and dining experience geared to locals who are "in the know." These changes could strengthen the performance of existing retailers, while energizing and connecting more effectively to the other areas of the Market and new development along Western Avenue. We can:

- Reorganize key portions of the DownUnder to create a **Food Life destination**. Strategies could include creating new social dining spaces to complement existing tenants. Locating an anchor tenant – such as a popular existing local food business – could also create a new draw for locals with positive ripple effects on other DownUnder businesses. Creating a targeted number of new restaurants would require studying the potential for infrastructure – such as kitchens and venting – that may be costly and should be carried out only in targeted locations. Other food and beverage vendors– such as bars, coffee shops, prepared foods, and food products – could also be located in the DownUnder without requiring significant new infrastructure.
- Reconfigure spaces around elevators and stairs at two ends of the DownUnder to **reduce crowding and increase the availability of public seating**, which visitors and Market community members say is badly needed throughout the Market. Renovation concentrated at core elements could provide pathways for infrastructure improvements, retail or tenant amenities, improved accessibility, and better access to light and air to improve the visitor experience.
- **Activation of the Pike Street Hillclimb balcony spaces** that connect the different levels of the DownUnder with public seating, pop-ups, and events to make an inviting route that attracts more foot traffic and draws people through all of the levels of the DownUnder, particularly the lowest levels that receive the least foot traffic.
- Increasing **visibility into and through retail spaces** throughout the DownUnder by expanding retail transparency and requirements for unblocked windows. This could improve wayfinding, provide better access to light and air to reduce energy use, and may allow more of the lofty utilitarian character of the original DownUnder buildings to shine through.

What We Heard: Internal Market Survey

The #2 issue respondents said the Master Plan should address areas of the Market that are under-visited, especially in the off-season.

[Placeholder for DownUnder diagram to identify strategies related to vertical circulation and connections to Western Ave]

Invest in the Market's entrances, internal connections, and gathering spaces to reinforce Downtown connections, improve wayfinding, redistribute visitor crowding, and create delightful public spaces

We can strengthen the Market’s physical ties to Downtown and the new Waterfront Park, drawing in the rapidly growing Downtown resident population as well as Downtown office workers seeking post-work gathering places. Strategically creating inviting new entry points and connections can also help alleviate the crowding that locals say deters them from visiting. Improving connections and legibility can be a “both/and” idea – retaining the sense of discovery that is an inherent Market experience and providing the comfort of knowing the general direction one is heading in.

The below actions would create a hierarchy of experiences for visitors, enhance a feeling of safety, create legible and engaging pathways, and expand programmable space and public seating. These actions can help define the edge of the Market district as well as its connections to other districts in support of strengthening Downtown connections.

- Increase the legibility and visibility of **Market entrances along First Avenue** with public art, signage, and/or other design elements. Providing people with multiple pathways to arrive at the Market reduces crowding and makes wayfinding easier. This could include creating a new connection between First Avenue and Post Alley through the Sanitary Atrium and enlivening the Livingston Baker passageway between First Avenue and Post Alley. Signage can also indicate First Avenue as the edge of the historic district to help relate the extent of the Market to the everyday user.
- Create more **visible, delightful public spaces**. This can include increasing visibility and facilitating event space functions in the Economy Atrium and adding sidewalk seating. Outdoor seating and terracing of the Soames Dunn Courtyard could create areas for social dining in collaboration with neighboring businesses. This would bring more visibility to Post Alley and Market businesses and create a “release valve” in a section of the Alley that is typically crowded in the summer by distributing people moving between Post Alley and Pike Place with an alternative route – although this would not be ADA accessible.
- Help to create a continuous journey along **Post Alley and First Avenue** from Virginia to the Pergola at Yesler Street in Pioneer Square to connect the experiences of multiple Seattle historic districts in collaboration with partners. As the waterfront and Downtown revitalization attract more visitors and residents to Downtown over time, alternative ways to walk through Seattle between the Market, sporting events, hotels and homes will distribute people and create an inviting and less crowded experience. This can include lighting, public art, wayfinding, and seating that create inviting public spaces along Post Alley, and programming and collaborative promotions with the adjacent historic districts.

What We Heard: Internal Market Survey

*“The Market isn’t an island; **what’s good for downtown is good for us**. The more people downtown, the faster new businesses will open, the safer downtown will feel, which will in turn bring more people. We can promote a cycle of prosperity for the whole district... The Market’s long-term survival is absolutely dependent on more locals feeling welcome in our neighborhood and patronizing our businesses.”*



DRAFT Concept Drawing: View of increased visibility and access to the Economy Market Atrium

[Placeholder for perspective view: Soames/Dunn courtyard]

Partner with the City to assign the PDA with responsibility for management of the operations of Pike Place to enhance a high-quality street experience for visitors while maintaining critical functions for Market businesses

As the historic main spine of the Market, Pike Place has long demonstrated the value of sharing uses on a street and the vitality that comes with that mix of uses. However, in the summer, Pike Place is continually crowded with both pedestrians and vehicles, and the street is a critical loading area for vendors who have no alternative locations for receiving deliveries. Managing the street differently to respond to varying seasonal and time-of-day uses while retaining the functional needs of the Market is needed. We can assume responsibility for the management of the street in order to improve the experience of visiting the Market, preserve access for critical business needs, and increase capacity for a greater range of activities to serve a growing number of visitors.

Actions to improve the operations of the street can include:

- Create a **comprehensive street management program** for Pike Place through a process led by the PDA. This can start through the evaluation of the functions, needs, and users of Pike Place and development of a report that identifies Market’s priorities for the use of the street. Designating the **PDA as the street manager** to coordinate multiple uses such as critical safety access, deliveries, parking, public seating, temporary closures, and special events – all of which have occurred in ad hoc manner to date. A central plan and management organization for public spaces is how the Downtown Seattle Association currently contracts with the City to manage Westlake, McGraw Place, and Occidental Parks, and how its Clean Team manages downtown streets; it is also similar to how the Freeway Park Association activates Freeway Park.
- Invest in **streetscape improvements** that support universal accessibility, electrical power and greater flexibility for street activation and uses such as outdoor dining, events, and kiosks for food vendors.

What We Heard: Internal Market Survey

The Internal Market survey indicated 2/3 of Market community members believe that the street should be managed differently. It confirmed that Pike Place provides critical infrastructure for loading. Farmers, crafters, and business owners typically use it for less than 30 minutes to unload and load and receive 1-2 deliveries per day. Deliveries happen throughout the day, with the most occurring between 8am-noon.

[Placeholder for view of Pike Place with mix of uses].

[Placeholder for Pike Place street use diagram]

Make the Market more physically accessible to a wider range of visitors

The historic, “quirky” spaces of the Market are a fundamental part of its charm and authenticity. However, many of these historic features – which well pre-date ADA requirements and standards – make the Market less accessible to the differently abled, as highlighted in outreach. With our commitment to DEI, we must embrace a renewed attention to ensuring that visitors – of different ages, abilities, and genders – can equitably access Market spaces.

There are also certain infrastructure needs that are necessary to better support and ensure the comfort of all visitors: outreach found consistently and repeatedly that more seating was not only important for differently abled visitors, but for visitors seeking a place to linger, rest, or eat. Another concern was a lack of available restrooms, and the need to open restrooms earlier, particularly for employees at the Market.

To make the Market more physically accessible we can:

- Develop a universal **accessibility assessment to guide** the prioritization of investments that would make the Market more accessible. This might include interventions such as resetting paving, eliminating curbs, and modifying or adding ramps, railings, and elevators, as well as adding lactation rooms and other facilities.
- Create a comprehensive **public seating and activation plan** that welcomes visitors to linger and at the Market without overcrowding spaces.

What We Heard: Internal Market Survey

*“Exploring the Market is part of the magic and charm of visiting, but we need **better wayfinding and easier access for those with disabilities**. We need gender-inclusive restrooms, not bathrooms segregated by chromosomes. We need more seating and shade to encourage people to rest and linger.”*

What We Heard: External Community Survey

Availability of places to sit was ranked as the #2 issue that most negatively impacted the experience of visiting the market, and availability of public restrooms was ranked as #3.

[Note: Integrating the on-going maintenance and repair of Pike Place Market buildings and spaces with accessibility is another way to address this issue. This will be outlined in the capital project phasing in future draft.]

Adopt a Market Sustainability Action Plan

Embracing a Sustainable Action Plan (SAP) will create a pathway for the Market to join global leadership among public markets in sustainability in the urgent context of climate change. The SAP, which is part of the Master Plan, is a blueprint for creating a continuous learning environment to elevate and expand sustainable leadership and practices that are intertwined with the identity of the Market and the City of Seattle. A continuous learning environment might include ongoing staff training, regular Council discussion of SAP goals and progress, adding expertise to the PDA Council in sustainability issues, and/or forming a team to advance the SAP. Washington State and the City of Seattle have set energy code standards that move the region toward global commitments to reduce carbon emissions.

The PDA, in partnership with the MHC, has an opportunity to become a model for sustainable preservation by demonstrating best practices for adaptive reuse of historic buildings. Preservation is typically most effective when there is active use that engages people with the place and appropriately adapts to current functional requirements. While it entails up-front capital investments, greater sustainability can support the Market's overall financial stability through reduced operational and energy costs and create resilient systems in the context of increased risk due to climate change. The SAP translates sustainability values and aspirations into a comprehensive approach for adapting best practices, including goals and metrics for the Market's culture, systems, and processes.

The SAP consists of four focus areas and objectives, multi-benefit examples and next steps for each. The goals and objectives are outlined below, and details of the full action plan are in the appendix.

- **GOAL: FOOD – Support sustainable food and farming practices from the source to the consumer and continue to raise the diverse and historic culture of food in the Pacific Northwest.** As part of our embrace of Food Life, we should double down on the Market's longtime role of providing access to healthy local and affordable food. As discussed earlier, through partnerships and farmer supports, the Market can support preserving and reinforcing equitable and sustainable farming practices in the Pacific Northwest, and it can select and/or prioritize farm and food businesses that source local products and ingredients. Further, we should work towards zero waste and reduced carbon emissions on-site and off-site among producers and merchants.
- **GOAL: ENERGY AND RESILIENCE – Achieve low-carbon operations and demonstrate national leadership while improving human comfort and resiliency.** We can reduce energy use by minimizing demand and maximizing conservation. Through a comprehensive energy audit of all PDA-owned buildings, the buildings with high energy use and nonconformance of State and City building performance targets can be prioritized for improvements. They can be designed for maximum occupant comfort in living and working spaces while using extremely little energy and optimizing physical plant performance at all scales to meet ever-evolving energy requirements. We can also plan and design for emergencies and vulnerabilities associated with the long-term effects of the climate crisis.

- **GOAL: MATERIALS** – Make informed material selections, balancing priorities to achieve durable, safe, and healthy projects with an equitable, sustainable supply chain to minimize possible negative impacts to human health and the planet. This strategy entails minimizing waste streams and prioritizing selection of low carbon, non-toxic materials in capital projects to help continue to build a healthy Market environment for merchants, residents, and visitors alike. We can encourage and celebrate the use of regionally manufactured products or materials and incentivize merchants to shorten supply chains and support equitable labor practices.
- **GOAL: HEALTH AND WELLBEING** – Develop holistic, targeted outcomes that include physical, mental, emotional, and financial effects on building occupants and the surrounding community. We can improve indoor environmental quality to support long-term health and wellbeing of merchants and visitors. Through developing an emergency response plan, we can continue to be a source of resilience for the community during times of need. We can aid in expanding economic opportunities to support a socially and economically diverse merchant community and provide the health benefits of biophilia through physical connection to natural systems, light, air, and patterns.

What We Heard: Internal Market Survey

*"Sustainability means a **resilient regional food network**."*

*"Making sure that Pike Place as a whole is all **compostable** and as close to **zero waste** as can be would be outstanding."*

*"Infrastructure that is more **energy efficient** (insulation, sealing holes, fans, a/c, better glass, etc), [and] more **shaded areas** [would make the Market more sustainable]."*

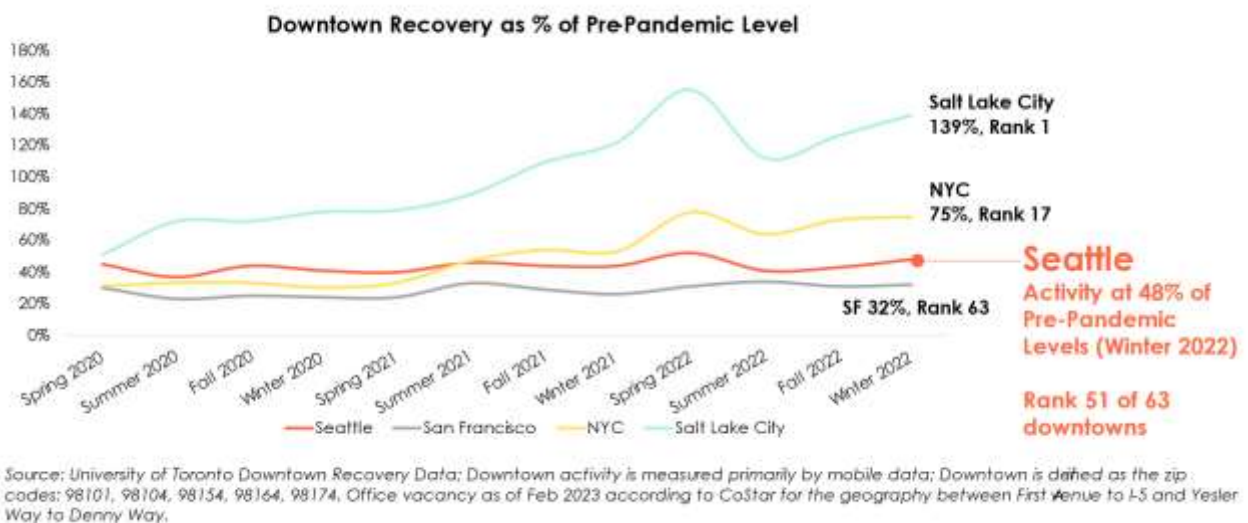
*"Anything that leads to **carbon offsets** is a good idea. We also have significant roof spaces that can be converted to '**green roofs**' provided that the roofs can support the weight of the soil/sod."*

3. Partnerships to amplify the Market as the Soul of Seattle

[New section]

Given its central role in Seattle’s history, culture, and identity, the Market is considered by many to be the “Soul of Seattle.” Social impact is a core value of the Market, which is home to a wide array of social services, including the Pike Place Market Foundation, Five Families – the Food Bank, Preschool, Neighborcare Clinic, Pike Market Senior Center, and Heritage House Assisted Living – and affordable housing. Other programs the Market offers include the Market Commons, a Food Access Program, Safety Net Funding, and a Small Business Recovery Program. Continuing to deliver on social impact will require facing new challenges including growing income inequality and rapidly growing costs of living that are threatening the stability of low- and middle-income people and are leading to an increased need for social services and affordable housing.

Further, downtown Seattle, of which the Market is a major anchor, still has not recovered from COVID. Downtown Seattle’s return of office workers continues to lag other cities by a high margin; as of winter 2022, it ranked 51 of 63 downtowns in terms of the recovery of foot traffic to pre-COVID levels.



In order to maintain and amplify the Market’s social impact and its status as the “Soul of Seattle,” we must revisit and renew strategic partnerships.

Increase public awareness of social impact at the Market and make needed capital improvements in the Food Bank.

As part of the master planning process, the PDA conducted extensive outreach to the social service community and the people it serves – including discussions with the Foundation and the Five Families; discussions with Market residents at resident BBQs; and interviews with other stakeholders. These conversations indicated a desire for further connection and partnership between the social services providers and the rest of the Market, as well as a desire for increased public visibility around their role and the impact of social service providers. Conversations highlighted that social services are challenging to sustain and require substantial funds to expand, and that providers’ physical assets need ongoing maintenance and capital improvements – particularly the Food Bank.

To increase awareness and address major capital needs, we can:

- Collaborate with social service providers on increasing **awareness of social service provision** at the Market in external messaging and marketing. Increased awareness of social impact can uplift providers and generate more donations while enhancing public perception of and support for the Market itself.
- Make **capital investments in the Pike Market Food Bank** in line with the Market's commitment to social impact through Food Life. The Pike Market Food Bank provides free groceries to downtown Seattle residents experiencing food insecurity – including many residents of the Market's affordable housing itself – and last year, 3,431 shoppers visited the Food Bank. The current Food Bank is in a less than ideal location within the garage.

What We Heard: External Market Survey

“Uplift the Foundation and social services at the Market – it will help us see the impact of the Market more broadly.”

What We Heard: Internal Market Survey

Understanding of the Market's Social Impact: Only **30%** of respondents agreed that the Market's social impact is well understood by the Market community and the public.

Strengthen external relationships and advocacy to embrace a “seat at the table” on local policy issues

Today, Downtown is grappling with public safety challenges, increasing commercial vacancies, and a steep drop in foot traffic driven by the pandemic, with significant implications for the future and vitality of the Market itself. Downtown revitalization is a major focus of City government, and we should have a “seat at the table” on local policy issues, particularly as they relate to the future of Downtown, in collaboration with other the Market community, downtown anchors, historic districts, and advocates.

Further, with respect to Master Plan implementation, as part of our commitment to DEI, we must ensure that the input of BIPOC communities and Tribes are intentionally solicited as improvements advance, particularly given the Market's role and the impact of our decisions on communities downtown, the city, and broader King County region. This includes inviting BIPOC Communities and Tribes that are currently not present in the Market and developing processes that allow for all voices to be heard.

We should:

- Strengthen **the PDA's external relations functions** to interface with the City and other external actors in order to advocate for the Market on issues that impact the Market community and its ongoing commercial success. This might include policies related to public safety, transportation and transit, public realm improvements, residential development, and sustainability, all of which are areas of focus and concern for City government, for downtown, and for Seattle communities. This effort can also include convening **coalition of downtown partners** to advocate collectively on actions that impact us, potentially including other historic districts and institutions like the historic districts of Chinatown-International District, Pioneer Square, Seattle Art Museum, Seattle Center, and Waterfront Seattle.
- Build **reciprocal relationships with BIPOC communities and Tribes** to inform ongoing implementation of the Master Plan - for example, periodic meetings to solicit input on ongoing tenant curation, events programming, and public art efforts to identify opportunities to ensure that BIPOC vendors, producers, and creators are represented.

What We Heard: Internal Market Survey

Market's Support for Downtown Revitalization: *84% of respondents agreed or strongly agreed that the Market can help support the revitalization of downtown post- COVID.*

"If attracting locals and downtown residents to the Market is critical to this plan, the Market should focus on what it means to help downtown recover and what it means to embrace and connect to the waterfront."

IMPLEMENTATION

[New section to be further built out for the next draft.]

Financial Sustainability

Market Rules and Business Operations

Market Organizational Structure

Phasing and Metrics

Phasing of Strategies in Short, Medium, and Long-Term

Metrics to Track Master Plan Process

CONCLUSION

[Placeholder; to be included in next draft.]

APPENDIX

1. Master Plan Consultants & Selection Process
2. Engagement Summary
 - a. Qualitative summary of interviews & discussion groups
 - b. Survey summary
3. Case Studies
4. Financial Analysis
5. Sustainability Action Plan
6. PDA Council Meeting Presentations
 - a. Kickoff
 - b. Eco-Charrette
 - c. Opportunities, Constraints & DEI
 - d. Food Life
 - e. Sustainability and Physical Analysis
 - f. DEI
 - g. Downtown District Anchor & Small Business Incubator
 - h. Scenarios Preview
 - i. Scenarios Workshop