ATHLETIC STADIUM

5 YEAR IMPACT STUDY

PREPARED FOR:

CITY OF SEATTLE

OFFICE OF PLANNING AND DEVELOPMENT

OFFICE OF ECONOMIC DEVELOPMENT

PREPARED BY:

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I. INTRODUCTION AND SUMMARY

INTRODUCTION

Safeco Field was developed as the home for the Seattle Mariners, by the Public Facilities District in 1999. Based on the conditions of a street vacation agreement for Occidental Avenue S. for use by Safeco Field, at years 5 and 10 after the construction, the Seattle Mariners were required to contribute $20,000 for an evaluation of "*business retention, housing, land value and development capacity for the surrounding area.*" A report of the valuation is required to be made to the city Council and the Public Facilities District Board.

The Seattle Mariners made the Year 5 contribution, currently held by the City's Office of Economic Development (OED), but the required study has not yet been undertaken until now. In the meantime, the Mayor initiated a South Downtown planning effort as part of his Center City Seattle planning strategy, and the Department of Planning and Development (DPD) and OED have agreed to complete the stadium-related study within the context of the South Downtown planning effort.

This report documents the result of the 5 year impact study. The scope of the study includes the following tasks

1. Evaluate gross receipts data for area businesses.
2. Interview 15-20 businesses to identify positive and negative impacts.
3. Interview 5-10 property owners to identify issues and tools to encourage a positive business climate.
4. Evaluate potential tools to address adverse impacts.
5. Document results.
6. Summarize implications for South Downtown planning and zoning actions.

This report is organized in eight sections:

I. Introductions and Summary

II. Stadium Event Activity

III. Interviews with Area Businesses

IV. Interviews with Area Property Owners

V. Parking Impacts

VI. Property Value Impacts

VII. Housing Impacts

VIII. Conclusions and Recommendations

The findings are summarized in the remainder of this section.

SUMMARY

EVENT ACTIVITY

Safeco Field hosts 81 regular season Mariner games each year plus playoff games and other major events. There were nine playoff games and three All Star game events over the period 1998 through 2005. There were 91 other major events ranging from community events, graduations, shows/exhibits, meetings and luncheons. Qwest Field and Event Center was developed north of Safeco Field, with the event center opening in 1999 and the stadium opening in 2002. The stadium hosts 8 regular season Seahawks games each year plus playoff games, as well as a variety of other events. The total number of events over the period 2003 through 2006 to date is 1,265. Meetings, miscellaneous events, banquets/receptions/parties, and sporting events are the largest categories.

47 of the 81 Mariner games are scheduled for weekday evenings. 8 games were scheduled on weekday afternoons, starting at either 1:35 PM or 3:35 PM. Seahawks games are typically held on Sunday afternoons, but two Monday evening and one Thursday evening game are scheduled in 2006.

BUSINESS RECEIPTS TRENDS

Business receipts data for area businesses are summarized in the following table.

	2005 Gross Receipts	**% Growth 1996 – 2005**	**Major Sectors**
Pioneer Square	$2.1 B	280%	Construction, Business Services, Amusement and Recreation
International District	1.5 B	250%	Construction, Wholesale, Professional and Business Services
Stadium Area / South of Dearborn	.8 B	145%	Construction, Business Services, Amusement and Recreation

While there are several anomalies in the data that need to be researched, the general picture is one of growth in business activities over a wide range of business sectors. The obvious stadium-related influences are team revenues and eating/drinking.

INTERVIEWS WITH AREA BUSINESSES

25 area businesses were interviewed representing a range of business types and locations. There are several common themes:

- Event attendees do patronize businesses in the immediate area of the stadiums.

- Parking is a perceived, if not real issue. Perceived shortages discourage regular customers on game days. The issue is most pressing in the area immediately around the stadium.

- Restaurants are the major attractors of event attendee spending. The benefits are most positive in Pioneer Square, and are insignificant if not negative in some areas of the International District.

- Certain retailers like the bookstore, carpet and apparel stores are beneficiaries of event-related activity. Retailers offering large or expensive items are less likely to make sales to walk-in patrons, and the extent of return business is inconsistent among the persons interviewed.

- Businesses that market to event attendees either through their products or promotions receive the greatest benefits.

- Business other than restaurants report that weekday games are disruptive to their businesses, in terms of service to their regular customers and their ongoing operations.

- Businesses that require regular truck access for receiving and delivery are recent affected by day game traffic and parking.

- Many businesses report adverse impacts from some sporting events attendees, including noise, litter, and public urination. Such behavior is more frequently attributed to football game attendees.

INTERVIEWS WITH PROPERTY OWNERS

7 property owners were interviewed. Their responses represented a wide view of attitudes and interests.

- Property owners interviewed from the Pioneer Square area viewed the stadiums as amenities and activity generators for development on their sites.

- Property owners interviewed from the International District considered proximity of the stadiums to be an overall advantage to potential businesses and demand for development on their property.

- The property owner interviewed from Little Saigon did not believe that stadium activity was a major factor in development potential for the area.

- The property owners interviewed from the stadium transition area agreed that afternoon baseball games conflict with warehousing and transportation activity in the area. One owner expressed the opinion that the area is no longer a desirable location for such uses, and felt that restriction on other uses in the area should be eased. A building owner felt that the stadiums were a destabilizing element, and had caused a loss of tenants in his building. One property owner commented that event activity generates parking revenues for his site.

PARKING IMPACT

Parking is identified by business owners as a major source for stadium impacts. The issue is both real and perceived. The pattern of parking demand varies by type of event and time of the event. Generally, attendees will begin arriving one hour to an hour and a half before a weekday game, but considerably earlier for a weekend football or baseball game. For a Sunday or evening game, on-street parking fills immediately.

The spatial distribution of demand varies with attendance. One parking lot operator we interviewed observed that:

- With the Kingdome, a crowd of 30,000 would fill up parking lots east to 3rd Avenue. A crowd of 60,000 would fill up lots past the freeway to the east.

- With Safeco Field, a sell-out crowd will fill Pioneer Square lots and International District lots east to 7th Avenue.

- With Qwest Field, a sell-out will fill up lots past the freeway.

Close-in lots often adjust their fee based on expected attendance with rates of $25 or $30 for sell-out games.

This experience indicates that parking is relatively scarce in Pioneer Square and to a lesser extent International District. The high parking demands of a large event put tremendous pressure on the parking resource in terms of utilization and rental rates.

PROPERTY VALUE IMPACTS

Changes in property values can reflect overall market supply/demand, local supply demand conditions, or changes in land use.

Generally, the number of land sales in the area has been small. Sales since 2000 have ranged from $97 to 230 per square foot. The highest price of $230 per square foot was for the Silver Cloud site north of Safeco Field. The price is equivalent to $21,000 per hotel room, a realistic price for a hotel of that quality.

The land prices prior to 2000 were generally under $40 per square foot. The properties were speculative or pioneering purchases.

The King County Assessor regularly evaluates land price trends as part of their valuation efforts. The valuation background reports identify the value range for stadium area neighborhoods. The Assessor reports for the periods 2002 through 2004 do not reflect any changes in the value range.

The lack of identifiable increases is at least partly due to the lack of properties on the market. In general, however, it is difficult to attribute any significant pressure on land values to the stadium, particularly in Pioneer Square, International District, and Little Saigon areas.

HOUSING IMPACT

Housing is an established use in Pioneer Square, the International District, and Little Saigon; but is allowed only as artist studio/dwelling units in existing buildings in the Stadium Transition Area. The number of dwelling units in the area is estimated to be:

	Number 2005	Increase since 2000
Pioneer Square	902	147
International District	1,910	396

While there is anecdotal evidence of stadium area residents being inconvenienced and frustrated by stadium event traffic, recent and proposed development projects include residential uses. Developers contacted during the ongoing Livable South Downtown planning study have identified housing as a very viable use in the future. The area offers the potential of an established residential and commercial district, with prices and rents that are lower than other urban center neighborhoods. Further, other uses like restaurants that are supported by stadium event attendees are attractive to potential residents as well. Potential developers have generally identified the stadium as a benefit to potential residents.

CONCLUSIONS AND RECOMMENDATIONS

The analysis supports the following conclusions.

1. Businesses differ in the type and extent of impacts.

    - Many restaurants near the stadiums benefit from attendees at almost all events.

- Many other businesses benefit from events at some times, weekday evenings, but not others, particularly weekday afternoons.

- Many businesses don't benefit from event attendees, but can schedule their activities to minimize conflicts.

- Some businesses, particularly those operating extended hours, seven days a week, have difficultly scheduling around events.

With a few exceptions, businesses identified 1:35 PM weekday baseball games as the events that create the most conflict. Those events overlap with the operating hours for warehouse/transportation businesses, and create traffic during the evening commute.

2. Parking is the most frequent issue raised by business owners.

    - Attendees for major sports events absorb the available parking inventory extending east to I-5, north into the business core and south into the industrial area.

    - Non-event customers for area businesses are discouraged from patronizing those businesses during events.

    - Parking fees are frequently raised to two or more times their regular level.

3. Traffic congestion and control are major issues raised. While many interested parties acknowledge the challenge and support current efforts of traffic control, many identify specific actions that would increase traffic flow including relaxing restrictions on certain turning movements.

4. Business and property owners are largely in agreement that some sporting event attendees create problems in the area with noise, litter, and urination.

5. There has not been significant redevelopment or new development as a direct result of the stadiums.

    - A hotel is under construction north of Safeco Field. While the stadiums will generate room night activity for the hotel, other sources of demand will be necessary to sustain hotels throughout the South Downtown area over the course of a typical year.

    - There are major office proposals east of Safeco Field and over the tracks east of Qwest Field. The stadiums themselves do not generate demand for such uses, but do support restaurants and retail/services that are amenities for such development.

- Housing development has occurred and is proposed in Pioneer Square and International District. Again, the stadiums themselves do not generate demand for such uses, but do support restaurants and retail/service businesses that are amenities for such development.

We recommend that the City and interested parties pursue the following approaches to dealing with stadium-related impacts.

1. Work with Seattle Mariners to minimize the number of weekday afternoon games, and when possible schedule those games at 3:35 PM rather than 1:35 PM. While scheduling of games is dictated by agreements among Major League Baseball and the Players Association, the Mariners are required to get City approval beyond the 6 afternoon games covered in their agreements.

2. Develop coordinated strategy for parking in the neighborhoods around the stadiums. Extents of the strategy include:

    - Possible organizing entity for parking in the area.

    - Regulation of on-street parking.

    - Parking enforcement.

    - Parking fees.

    - Information on parking availability and directional signing.

3. Provide adequate staffing and efficient routs for directing vehicular traffic before and particularly after events. While the teams and the City regularly review and discuss traffic issues, they should continue to evaluate adequacy of staffing and restrictions on turning movements and traffic routes.

4. Provide convenient routes for pedestrian traffic that will minimize conflicts with vehicular traffic and business operations. A strategy would recognize adequacy of sidewalks, business access to streets opened for pedestrian routes, and adequate crosswalks.

5. Provide facilities and staffing to minimize adverse impacts of event attendee behavior. Additional public restrooms and garbage cans could reduce impacts of littler and public urination. Additional police presence and enforcement could reduce the incidence of such behavior.

6. Further encourage outreach between teams and local businesses. Businesses that make an effort to serve attendees through their product/service offerings and promotions, can realize benefits while reducing negative impacts. The team can expand their efforts to promote and involve local businesses.

7. The City and public partners need to resolve the major transportation infrastructure projects in the area. Projects such as the Viaduct, SR 519, and freight mobility projects can alleviate conflicts between the warehouse/transportation businesses in the immediate area of the stadiums and the Duwamish Manufacturing Industrial Center.

II. STADIUM EVENT ACTIVITY

Neighborhood impacts are related to the numbers and type of events held at each stadium. Event activity is described in this section in terms of:

Event Activity

Event Profile

EVENT ACTIVITY

SAFECO FIELD

Safeco Field opened in July 1999. The number of baseball games and the average attendance is summarized in Table 1.

Table 1

Safeco Field
Mariners Games

	Games	Paid Attendance	Turnstile Attendance	Avg. Paid	Avg. Turnstile
1999	42	1,816,026	1,686,116	43,239	40,146
2000	85[1]	3,341,485	3,048,772	39,312	35,868
2001	89[2]	3,882,315	3,692,169	43,621	41,485
2002	81	3,540,482	3,273,289	43,710	40,411
2003	81	3,269,268	3,039,966	40,361	37,530
2004	81	2,942,054	2,539,408	36,322	31,351
2005	81	2,725,549	2,373,311	33,649	29,300

[1] Includes 4 playoff games
[2] Includes 5 playoff games and 3 all star game events
Source: Seattle Mariners

The home season features 81 games. The Mariners hosted playoff games in 2000 and 2001, as well as the all-star game and associated events in 2001. Total paid attendance was highest in 2001, the year in which the teams set a record for most regular season wins. Regular season paid attendance was slightly higher in 2002, but turnstile attendance was lower in that year. Regular season turnstile attendance was 95% of paid attendance in 2001, but only 87% in 2005.

Safeco Field also hosts several other major events each year.

Table 2

Safeco Field
Other Major Events

By Year	
2000	9
2001	10
2002	24
2003	10
2004	16
2005	13
2006	3
Total	91

Total by Period	
Jan – Mar	24
April – June	34
July – Sept	18
Oct – Dec	13
Other	2
Total	91

Source: Seattle Mariners

The types of events range from graduations, community events (e.g. Race for the Cure, St. Patty's Day Dash, Heartwalk), shows/exhibits (JobFair, Antique and Farmer's Market, tradeshows), meetings or luncheons (Microsoft Company meeting, US Conference of Mayors, Fred Hutchinson Award Luncheon), concerts, and other sporting events.

QWEST FIELD AND EVENT CENTER

Qwest Field opened in July 2002. The adjacent Event Center opened in October 1999. The number of Seahawk Games and average attendance is summarized in Table 3.

Table 3

Qwest Field
Seahawk Games

Regular Season	Games	Paid Attendance	Avg. Attendance
2002	8	504,621	63,077
2003	8	512,150	64,018
2004	8	533,436	66,679
2005	8	532,954	66,619

Source: ESPN.com

In addition, Qwest Field hosted 2 pre-season games in each of those years, plus 2 playoff games in 2006.

Seahawks games are a small portion of overall event activity at Qwest Field and the Event Center. The number and type of events is summarized in Table 4.

Table 4

Qwest Field and Event Center
Number of Events by Type

Event Type	2003	2004	2005	2006	Grand Total
Consumer Show	21	18	20	7	**66**
Meeting	63	80	151	48	**342**
Misc. Events	69	80	109	26	**284**
Sporting Event	55	48	48	8	**159**
Trade Show	22	26	28	15	**91**
Graduations/Reunions/Proms	16	28	31	1	**76**
Banquets/Receptions/Parties	32	50	68	19	**169**
Concerts	12	7	7	2	**28**
Seahawks Non-Game Event	6	17	22	5	**50**
Grand Total	**296**	**354**	**484**	**131**	**1265**

As shown, sporting events represent approximately 13% of total events. The number of events has grown steadily since opening. Attendance varies from several hundred thousand over 5 days for the Seattle International Auto Show to meetings with fewer than 75 attendees.

EVENT PROFILES

Seattle Mariner games can be categorized according to the time of day and day of the week. The distribution of games by type and associated attendance is summarized for the 2005 season in Table 5.

Table 5

Mariner Games by Time of Day and Week – 2005

	Number of Games	Avg. Turnstile Attendance
Weekday Afternoon	8	26,360
Weekday Evening	47	27,946
Saturday Afternoon	8	33,839
Saturday Evening	5	29,678
Sunday Afternoon	13	33,066
Total	81	29,300

Source: Seattle Mariners
Property Counselors

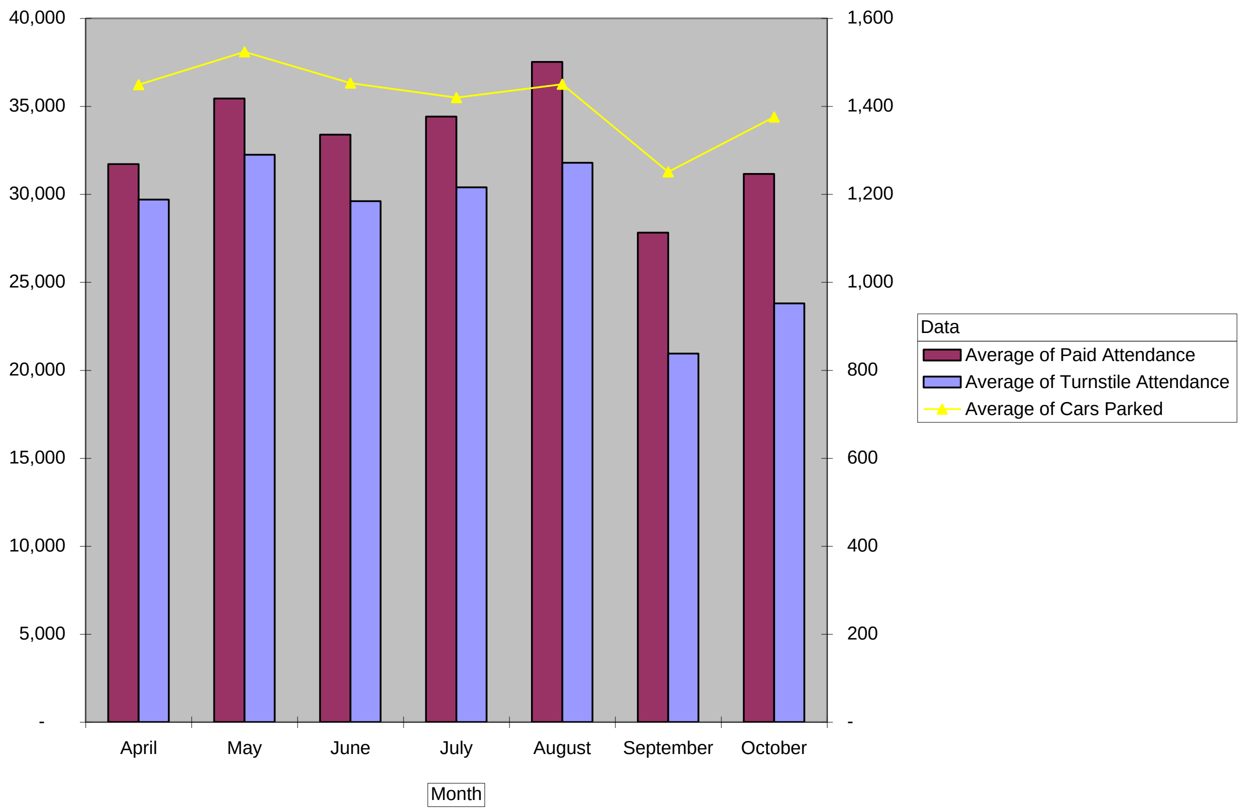
Over one-half of the games are played in the evening on weekdays. The highest average attendance was for weekend afternoon games. The lowest was for weekday afternoon games.

Weekday afternoon games are scheduled on get-away days at the end of a series or home-stead. Major League Baseball and Player Association agreements require day games in order to facilitate team travel to their next destination. Start times for afternoon games have varied from 1:35 PM to 3:35 PM. In 2006, five of the seven afternoon games start at 1:35 PM, while a game with the Los Angeles Angels in April started at 3:35 PM, and a game on July 4 started at 1:05 PM.

Attendance patterns over the course of the season vary depending on the performance of the team. Figure 1 summarizes the attendance patterns in 2005. Attendance reached the highest level in August, but declined sharply in September, with the Mariners not in competition for a play-off berth.

Figure 1

Mariner Attendance by Month-2005



Seahawk games are usually scheduled at 1 PM on Sundays, except for occasional Sunday evenings or Monday games during the regular season, and Saturday games in the playoffs. The distribution for the upcoming 2006 season is summarized in Table 6.

Table 6

Seahawk Home Games by Time of Day and Week – 2006

Sunday Afternoon	5
Sunday Evening	0
Monday Evening	2
Thursday Evening	1
Total	8

Source: Seattle Seahawks

This year pre-season games are scheduled for a Saturday evening and a Thursday evening.

II. BUSINESS RECEIPTS TRENDS

Trends in economic activity in the neighborhoods around the stadium should be reflected in data on gross business receipts. The City of Seattle collects a business and occupation tax on all businesses in the City. This data was analyzed to evaluate overall trends and possible impacts associated with the stadium. Data are summarized for the south downtown neighborhoods:

Pioneer Square

International District

Stadium Area/ South of Dearborn

The areas are shown in Figure 2.

Receipts are reported each quarter or annually. Data are available on a quarterly basis but are analyzed on an annual basis here. The data from businesses filing annually can't be disaggregated by quarter and the quarterly data often reflects adjustments from prior periods. Gross receipts are reported for a single location, even if there are multiple places of business. A business division in Pioneer Square may have its receipts reported by an administrative office outside the district, and an administrative office in Pioneer Square may report receipts from divisions elsewhere in the City.

PIONEER SQUARE

Trends in gross business receipts for Pioneer Square over the period 1996 through 2005 are summarized in Table 7. Generally, total receipts grew quickly through 2000, remained stable through 2004, and increased significantly in 2005. Some of this pattern is explained by the construction activity of the stadiums themselves. Construction receipts were very high from 1998 through 2003. Other sectors that show high levels of gross receipts are:

- Manufacturing with a rise and fall in receipts over the period.
- Eating/drinking with an apparent anomaly in the data for 2005. (Two entries in the fourth quarter appear to be data entry errors.)
- Finance Insurance Real Estate
- Business Services, with much of the growth in computer-related services.
- Amusement and Recreation – with much of the growth in professional sports.

- Legal services – have remained strong with some variability from year to year.

- Health Services – with apparent anomalies in 2005 for chiropractic and health practitioners.

- Other Professional Services

Table 7

Gross Business Receipts Trends
Pioneer Square

	1996 Total	1997 Total	1998 Total	1999 Total	2000 Total	2001 Total	2002 Total	2003 Total	2004 Total	2005 Total
Agriculture, Forestry, Fishing	6,909,915	4,036,750	4,331,168	5,257,683	5,434,195	6,083,788	5,211,720	5,393,592	6,053,612	7,117,617
Construction	34,831,155	75,042,312	171,277,072	291,988,570	524,763,305	442,911,113	305,358,840	387,104,685	134,666,383	138,488,547
Manufacturing	33,416,219	29,737,752	34,033,703	48,944,230	46,139,013	50,449,194	48,140,480	46,424,056	45,907,201	66,731,144
Transportation	28,808,136	34,122,035	37,908,717	31,605,655	30,082,984	25,709,186	28,264,905	27,663,475	42,022,217	62,761,442
Wholesale Trade	26,210,840	25,162,082	37,715,904	37,841,276	37,478,266	36,341,024	27,939,444	32,810,974	30,108,928	39,726,341
Retail Building Materials	-	-	-	-	172,297	149,536	138,909	-	-	-
Retail General Merchandise	-	18,000	109,544	218,355	66,624	173,170	116,975	111,244	96,334	129,778
Retail Food	4,040,582	25,980,124	2,859,344	2,637,256	3,001,784	2,592,770	2,343,965	2,154,195	2,382,230	2,266,634
Retail Apparel	7,254,675	9,096,413	5,227,503	4,955,964	4,469,306	3,771,473	1,577,026	478,723	6,937,615	2,064,770
Retail Furniture and Appliances	21,113,130	13,755,907	17,436,747	16,753,984	16,097,106	6,470,179	4,938,692	8,230,122	18,350,815	16,856,353
Retail Eating/Drinking	33,933,437	40,369,418	43,480,473	38,135,083	36,942,026	33,508,275	26,852,550	30,019,101	32,061,249	326,628,714
Retail Miscellaneous	25,672,578	34,071,978	35,238,866	33,998,296	37,500,298	37,338,163	36,622,566	36,722,557	45,880,297	72,343,095
Total Retail Trade	92,014,402	123,291,841	104,352,477	96,698,938	98,249,439	84,003,566	72,590,682	77,715,942	105,708,540	420,289,345
Finance Insurance Real Estate	21,273,073	24,359,017	28,846,732	29,236,766	35,122,454	33,302,066	31,676,289	28,574,493	25,529,128	106,899,364
Hotels and Motels	1,758,412	2,196,495	2,459,045	2,550,532	2,532,779	2,451,686	2,436,706	2,287,181	2,515,349	2,768,739
Personal Services	11,756,174	13,026,920	14,140,154	2,680,715	2,776,199	2,580,230	2,279,249	2,920,073	2,746,485	9,818,427
Business Services	52,203,233	63,721,104	84,918,897	115,768,165	309,787,559	234,019,961	182,194,384	209,652,828	401,220,113	613,215,613
Automotive Services	8,085,555	10,245,157	14,495,724	26,971,319	6,217,264	7,782,066	8,368,748	8,921,212	10,205,027	11,250,633
Other Repair Services	1,908,962	2,253,914	2,705,829	3,259,246	3,561,536	3,530,508	5,793,470	6,712,016	6,171,223	6,054,894
Amusement and Recreation	72,322,385	94,060,468	94,847,236	56,949,134	20,518,025	220,194,632	235,692,109	247,487,204	259,497,655	245,833,986
Health Services	6,914,586	6,610,293	7,546,830	7,750,304	8,699,758	9,769,531	10,027,332	12,392,994	11,281,691	117,049,467
Legal Services	47,202,215	50,656,691	55,913,965	54,428,999	55,864,377	58,418,851	61,972,706	54,934,985	65,573,548	55,851,541
Educational Services	80,048	204,245	481,543	993,551	641,272	387,938	2,319,077	3,384,866	3,841,291	11,849,265
Social Services	5,132,572	6,358,445	6,808,615	8,079,098	11,027,125	11,790,216	10,741,331	12,161,027	13,945,070	13,565,211
Organizations	4,368,412	4,231,378	4,336,684	5,504,527	6,222,733	6,490,968	5,936,197	3,701,819	5,523,308	5,192,979
Other Professional Services	96,178,494	131,295,848	142,776,019	178,581,195	171,076,640	132,051,608	151,258,998	165,045,020	159,574,689	166,014,610
Administrative	17,990	37,667	139,071	3,000	-	-	-	-	-	-
Total Services	307,929,039	384,898,625	431,569,614	463,519,786	598,925,267	689,468,196	679,020,307	729,601,226	942,095,448	1,258,465,365
Other	639,728	350,143	128,283	183,141	1,039,658	1,189,262	1,042,191	743,729	828,445	921,388
Total All Industries	552,032,507	701,000,556	850,163,669	1,005,276,045	1,377,234,581	1,369,457,395	1,199,244,858	1,336,032,170	1,332,919,901	2,101,400,552

Source: City of Seattle B&O Tax data
Property Counselors

Ignoring the apparent anomalies and the construction activities, there has been steady growth in business activity over a wide range of business sectors. Other than the sports team's receipts in the amusement and recreation section, there are no obvious relationships to event activity at the stadiums.

INTERNATIONAL DISTRICT

Trends in gross business receipts for International District over the period 1996 through 2005 are summarized in Table 8. Overall, gross receipts are approximately 75% of the total levels in Pioneer Square. Total receipts grew quickly from 1996 through 2001, remained steady through 2004, and grew quickly again in 2005. Construction activity from 1998 through 2003 accounts for much of the growth. Other sectors that show high levels of gross receipts include:

Wholesale Trade – with an apparent anomaly for automobiles in 2004 and home furnishings in 2005.

General Merchandise

Food

Eating/Drinking

Miscellaneous Retail

Finance Insurance Real Estate

Business Services – primarily business services not elsewhere classified

Legal Services

Other Professional Services – including architecture and engineering services, and management consulting.

Table 8

Gross Business Receipts Trends
International District

	1996 Total	1997 Total	1998 Total	1999 Total	2000 Total	2001 Total	2002 Total	2003 Total	2004 Total	2005 Total
Agriculture, Forestry, Fishing	1,078,965	1,065,625	1,080,587	1,062,816	1,234,814	1,262,509	1,344,726	1,144,572	1,297,669	1,692,642
Mining	-	1,561	-	62,280	-	-	-	-	-	-
Construction	48,163,350	111,983,152	173,966,467	244,099,939	272,358,646	288,286,571	214,220,432	202,501,068	136,613,401	132,878,056
Manufacturing	31,402,334	30,059,384	21,205,618	41,746,452	46,396,073	37,851,990	23,652,211	15,106,233	15,141,482	30,910,818
Transportation	9,341,601	7,280,529	8,353,723	13,328,496	14,006,565	7,200,775	8,044,584	8,152,187	8,592,856	22,383,157
Wholesale Trade	47,906,415	51,264,175	55,937,961	54,491,981	52,527,254	49,189,606	48,976,636	52,386,846	164,357,017	534,871,213
Retail Building Materials	-	-	-	-	136,911	151,140	50,758	-	-	-
Retail General Merchandise	43,882,111	47,543,748	54,218,098	26,107,186	20,797,875	28,992,768	29,372,730	36,710,037	36,251,750	30,583,566
Retail Food	37,917,610	38,895,411	36,653,696	31,607,297	28,383,486	30,605,776	32,152,503	31,804,404	37,151,542	39,928,235
Retail Automobiles and Gas	968,839	1,031,894	701,040	782,364	1,233,657	1,401,943	988,651	268,802	427,828	581,205
Retail Apparel	-	716	87,440	36,770	-	-	-	-	-	47,323
Retail Furniture and Appliances	1,567,651	6,383,850	1,220,056	23,259,213	63,956,382	81,822,085	85,984,637	96,425,507	118,704,286	187,239,641
Retail Eating/Drinking	23,739,359	29,021,651	24,767,126	62,687,071	26,164,505	26,094,855	25,758,838	46,999,890	29,282,414	53,306,159
Retail Miscellaneous	21,845,024	28,417,440	26,947,914	62,264,587	52,844,965	78,095,366	101,682,455	64,556,003	37,676,845	75,038,214
Total Retail Trade	129,920,594	151,294,710	144,595,369	206,744,489	193,517,780	247,163,931	275,990,571	276,764,643	259,494,664	386,724,343
Finance Insurance Real Estate	20,540,077	22,830,311	24,474,928	26,143,747	25,166,993	26,692,394	38,057,304	42,878,800	55,181,566	66,392,346
Services, Hotels and Motels	119,555	42,339	46,568	38,051	42,131	29,396	14,913	6,852	24,869	0
Personal Services	1,699,398	4,972,302	2,721,214	2,732,862	2,877,345	2,939,207	4,464,495	4,494,958	4,562,850	7,163,528
Business Services	28,616,173	30,810,234	32,251,105	47,306,852	54,541,052	60,535,475	68,149,254	68,740,110	78,956,077	85,145,757
Automotive Services	11,786,541	12,323,425	12,344,873	13,998,313	15,014,646	15,744,842	16,927,613	18,924,321	20,285,750	32,770,156
Other Repair Services	810,411	910,286	960,700	902,084	1,098,094	987,612	1,019,158	968,872	921,825	12,738,050
Amusement and Recreation	1,965,240	1,414,293	1,181,793	2,658,723	2,482,096	2,395,848	2,163,544	1,937,628	1,765,320	2,667,613
Health Services	7,843,126	8,296,227	8,247,653	8,235,162	8,554,234	9,283,818	10,688,687	11,870,292	11,781,711	16,304,344
Legal Services	11,059,354	14,874,043	19,507,698	21,102,030	40,845,489	21,335,142	29,405,510	25,438,945	30,883,737	25,142,553
Educational Services	1,061,171	1,378,990	1,835,159	7,714,933	1,223,387	1,394,982	1,571,527	1,756,231	6,172,500	6,311,008
Social Services	6,319,896	14,832,609	15,321,572	16,410,859	18,341,671	15,440,930	20,116,084	21,205,252	22,668,591	25,834,050
Organizations	118,342	300,003	133,376	194,075	209,015	168,189	949,331	361,647	207,612	16,537
Other Professional Services	65,725,852	46,572,629	37,631,058	40,781,873	107,473,337	102,084,084	106,191,785	175,419,681	106,599,909	111,850,295
Administrative	8,268	34,315	157,800	319,840	440,265	244,818	397,023	739,707	569,874	405,052
Total Services	137,133,327	136,761,695	132,340,568	162,395,656	253,142,761	232,584,343	262,058,922	331,864,496	285,400,625	326,348,943
Other	1,887,062	1,513,873	1,614,379	1,608,820	1,541,008	1,384,090	1,011,054	705,379	664,849	748,368
Total All Industries	427,373,725	514,055,015	563,569,601	751,684,675	859,891,893	891,616,209	873,356,440	931,504,223	926,744,128	1,502,949,885

Source: City of Seattle B&O Tax data
Property Counselors

The retail trade sectors show strength in the categories mentioned above. International District has Eating/Drinking sales comparable to those in Pioneer Square, but food and general merchandise sales that are much larger.

Again, the overall picture is one of growth areas in a wide range of business sectors. This is an obvious relationship to activity at the stadiums.

STADIUM TRANSITION AREA AND SOUTH OF DEARBORN

Trends in gross business receipts in the Stadium Transition Area and South of Dearborn areas over the period 1996 through 2005 are summarized in Table 9. Overall receipts are similar in magnitude to International District. Total receipts grew quickly from 1996 to 1998, remained steady through 2000, and grew thereafter.

The two largest sectors are construction and amusement and recreation. Construction values reached their highest levels after Safeco Field was complete, and apparently reflect the transportation projects in the area. Amusement and recreation are primarily professional sports. This category shows a step increase in 2001, two years after the team moved from the Kingdome. Other sectors with notable sales volumes are:

Manufacturing – showing a cyclical pattern over the period.

Wholesale Trade – providing auto parts, beer and wine, and fresh produce.

Retail Apparel – an apparent anomaly.

Eating/Drinking – with a significant increase in 2001.

Business Services – including advertising and security services.

Social Services

Generally, the picture is one of limited growth in recent years. The obvious stadium-related influence is in team revenues and eating/drinking.

Table 9

Gross Business Receipts Trends
SODO District

	1996 Total	1997 Total	1998 Total	1999 Total	2000 Total	2001 Total	2002 Total	2003 Total	2004 Total	2005 Total
Agriculture, Forestry, Fishing	1,068,669	859,851	668,397	1,143,061	1,063,606	904,629	817,412	1,258,429	1,635,300	1,299,693
Mining	-	-	-	-	-	-	-	-	-	-
Construction	55,120,890	122,992,707	185,255,559	248,767,911	310,441,013	327,195,061	233,704,076	407,314,300	182,147,611	157,691,236
Manufacturing	17,129,828	18,101,238	32,367,183	42,859,588	43,157,204	43,045,542	28,450,104	24,514,535	28,242,003	48,938,737
Transportation	27,176,440	37,226,914	24,994,405	17,305,742	17,167,390	11,754,584	6,984,217	3,628,497	3,721,072	1,096,114
Wholesale Trade	53,679,284	57,823,155	113,034,350	62,756,597	47,659,119	41,752,146	34,936,178	35,142,398	144,296,197	88,147,582
Retail Building Materials	-	-	-	-	-	-	-	-	-	-
Retail General Merchandise	2,166,514	2,443,964	2,564,074	2,352,396	2,692,285	3,290,163	3,235,136	3,378,716	3,913,006	5,068,709
Retail Food	8,898,981	9,999,907	10,267,386	7,374,555	9,093,495	10,443,300	11,307,118	12,222,834	11,986,368	12,580,788
Retail, Automobiles and Gas	16,445,824	18,010,736	24,997,664	29,374,726	24,669,834	14,509,420	17,423,432	15,672,625	12,585,645	14,202,805
Retail Apparel	3,053,816	2,640,581	1,609,322	1,058,193	1,815,625	1,445,605	1,780,550	1,906,026	2,490,263	50,809,414
Retail Furniture and Appliances	8,163,446	8,838,005	9,353,931	9,476,558	6,460,672	1,013,113	1,447,740	1,690,721	1,254,592	2,280,868
Retail Eating/Drinking	5,608,237	5,770,556	6,135,194	5,511,928	4,236,159	26,293,520	27,349,159	26,692,955	23,369,338	40,533,679
Retail Miscellaneous	4,292,088	7,224,519	7,989,868	7,587,515	10,284,541	9,396,202	9,856,313	11,271,232	17,032,258	30,390,515
Total Retail Trade	48,628,905	54,928,269	62,917,438	62,735,871	59,252,611	66,391,322	72,399,449	72,835,110	72,631,470	155,866,778
Finance Insurance Real Estate	7,638,382	9,354,171	10,247,372	10,266,136	10,767,170	11,592,498	14,875,060	13,861,765	14,061,724	15,326,732
Services, Hotels and Motels	-	-	-	-	-	-	-	-	-	-
Personal Services	9,342,637	10,898,025	12,251,185	915,078	779,388	870,491	2,711,921	2,582,743	2,697,616	2,756,476
Business Services	17,261,304	21,723,982	25,003,076	31,765,992	32,779,140	36,309,120	46,585,653	67,191,748	84,546,295	103,138,856
Automotive Services	1,243,930	1,054,950	968,977	1,264,651	1,164,508	1,150,778	1,010,116	1,001,043	1,185,875	1,374,538
Other Repair Services	-	-	-	-	-	-	-	-	-	-
Amusement and Recreation	93,969,475	130,828,968	126,788,114	75,137,372	6,644,732	201,991,009	214,261,945	222,758,485	245,428,172	231,578,512
Health Services	667,436	610,914	639,722	887,511	1,000,315	698,754	273,594	44,593	90	-
Legal Services	1,850,518	2,590,450	2,514,328	2,965,656	-	-	3,473,661	3,382,425	3,378,812	3,355,882
Social Services	5,260,831	14,136,804	13,231,422	15,269,651	16,025,185	16,917,297	17,443,800	18,272,660	19,322,555	23,853,880
Organization	-	-	-	-	-	-	-	-	-	-
Other Professional Services	989,245	2,731,622	2,649,902	2,036,333	2,641,737	2,533,176	3,273,070	3,475,611	3,697,270	3,343,152
Administrative	-	-	-	-	-	-	-	-	-	-
Total Services	130,585,376	184,575,715	184,046,726	130,242,244	61,035,005	260,470,626	289,033,758	318,709,308	360,256,686	369,401,295
Other	112,660	195,472	337,199	337,417	141,672	-	-	-	-	-
Total All Industries	341,140,434	486,057,492	613,868,629	576,414,566	550,684,791	763,106,409	681,200,253	877,264,342	806,992,061	837,768,167

III. INTERVIEWS WITH AREA BUSINESSES

We conducted interviews with 25 area businesses to discuss the nature of their business, impacts of events at the stadium, and strategies for mitigating impacts. The persons interviewed are listed in Appendix 1. The businesses that the interviewees reprsent are intended to reflect a range of business types and location: but not necessarily a statistically valid sample. The information derived from the interviews is presented in this section by neighborhood and type of business.

PIONEER SQUARE

The businesses that we contacted fall into four broad categories: restaurants/nightclubs, galleries, other retail businesses, and industrial uses.

RESTAURANTS/NIGHTCLUBS

There are many restaurants and clubs in the Pioneer Square area that cater to game attendees either before or after vents. Stadium events represents as much as 50% of total business volume in the case of one restaurant located adjacent to Qwest Field, and 10 to 15% for a restaurant located at the north edge of Pioneer Square near the core of the central business district. The interviewees all identified the impact of the stadium to be positive for the businesses.

Restaurants and clubs are typically open from before noon to midnight or later, seven days a week. They are available to serve event attendees before and after events. Most of the stadium-related business is from sports events. The extended hours make it possible to serve attendees regardless of the time of day or day of week. One restaurant operator indicated that he preferred early afternoon start times for weekday games, because it generated additional lunch business, while another preferred late afternoon start times so as not to interfere with regular lunch business. Patrons are more likely to spend before or after an event on weekends.

The perception of a parking shortage, if not an actual shortage was identified as a problem by all those interviewed. It's particularly a problem for a nightclub seeking to attract patrons for shows on game nights.

GALLERIES

Galleries differ somewhat in their perceptions of business impacts for event attendees. Gallery representatives that we spoke to agreed that there was lots of foot traffic on event days. In some cases this results in walk-in traffic. The walk-in traffic isn't likely to purchase expensive items however . In some cases, the increased walk-in traffic dictates higher staffing, but the limited sales revenue doesn't cover the cost. The representatives we interviewed agreed that event activity discourages their regular patrons, as a result of perceived or real parking shortages. While some game day walk-ins may return at another time, this is believed to be an infrequent phenomenon.

Galleries are generally not open in the evening, or on Sundays, so weeknight and Sunday games aren't a great issue.

Representatives did identify problems with litter and public urination on game days.

OTHER RETAIL

Other retail businesses interviewed included a bookstore, carpet store, clothing store, furniture store, and building material showroom. The bookstore is open seven days per week until 9 or 10 PM. Baseball attendees frequently shop at the store before games. Books are the type of merchandise that a shopper can purchase and carry to a game. Football patrons are less likely to visit the store and make purchases. The perceived shortage of parking on game days discourages regular customers. This is a particular problem on Sundays in November and December.

The clothing store and the carpet store both identified event attendees as a strong source of business. Both stores are open seven days a week. Increased foot traffic generates sales on event days as well as return business. Perceived parking shortages were identified as a major issue.

The furniture store identified mixed impacts. As with the galleries, they report limited revenue from walk-in businesses, and not much return business. The shortage of parking on game days discourages regular customers. Football sundays have the greatest negative impact.

The building material showroom is generally affected only by baseball day games. They aren't open on Sunday and close at 5 PM during the week. Many regular customers stay away during game days. The walk-in traffic may make purchases at the time or during a return visit, but in many cases are not serious shoppers.

INDUSTRIAL

We interviewed a cold storage facility operation and a commercial printer, both located on 1st Avenue with loading facilities on Occidental. Both businesses are open Monday through Friday, and are closed by 6 PM. Evening games and weekend games do not present significant conflicts. The afternoon baseball games do create conflicts, however. In addition to the area-wide increases in traffic, Occidental may be closed to vehicle traffic. In the case of a night game, this may occur at 5 PM; for an afternoon game, it would occur earlier. In either case, the limited access and pedestrian traffic inhibits pick up and delivery. Both businesses monitor scheduled start times and coordinate their activities accordingly. With a 1:35 PM start time its difficult to avoid conflicts.

Much of the conflict is due to pedestrian traffic on Occidental. It's difficult for trucks and pedestrians to share the roadway.

INTERNATIONAL DISTRICT

The businesses that we contacted fall into three broad categories: market, restaurants, and other retail and service.

MARKET

Uwajimaya is a major anchor in the International District. Uwajimaya serves a diverse customer base throughout the region. The store manager identifies game day activity at the stadium as positive. The store is open seven days a week until 10 PM (9 PM on Sunday). The store is open to serve event attendees before evening games and before/after other games. For afternoon games and weekend games, event attendees come by for lunch at the store. They serve fewer attendees for evening games. The store makes an effort to serve event attendees through its food court offerings and game day specials.

The manager acknowledges that traffic congestion on game days is a potential deterrent. However, they do have their own parking lot, so regular customers can find a place to park. The garage closes at 10 PM, and hourly parking rates are $7.50 (with credit for store purchases), so event attendees are not likely to use their parking.

RESTAURANTS

The restaurants in the International District don't believe that they capture significant spending by event attendees. Generally, event attendees take up parking that would otherwise go to regular customers. (They differ from Uwajimaya in that they don't control their own parking.) One restaurant reports some sit-down business before games, and take-out sales, but that is more then offset by loss of other business. Another restaurant is open until midnight, and serves some event attendees after games, but this is a small share. Weekends offer frequently strong lunch business, but this is lost on football Sundays.

OTHER BUSINESSES

We interviewed the operator of a teahouse and specialty hotel. None of her customers are event attendees. The major impact is noise and litter from football game attendees.

LITTLE SAIGON

The major business categories in Little Saigon are markets, restaurants and other retail and service businesses. The business representatives that we interviewed indicated that they are not greatly affected by game activity. One restaurant owner reported that drive through traffic on game days was a problem. None of the interviewees considered parking impacts to be serious, although parking is an issue on football game and non-game days. Little Saigon's location east of I-5 is somewhat beyond the limit for event related parking.

STADIUM TRANSITION DISTRICT

We interviewed representatives of businesses in two broad categories: warehousing and retail/showroom.

WAREHOUSING

The two warehousing businesses included a third party warehouse and trucking business, and a fresh produce distributor. The third party warehouse firm handles a limited number of low turnover items. Much of their business has been moved to warehouse space in the Kent Valley. The Kent location is much better suited to the requirements of handling large trucks. As a result, the south Downtown facility has limited truck activity and operates between 8 AM and 4 PM most weekdays. There is little if any conflict with evening and weekend baseball events. There are conflicts, however, for day baseball games. Given the level of activity at the site, it is often possible to schedule around the conflicts.

The produce warehouse operates 24 hours a day, seven days a week. There is limited receiving or no deliveries on Sunday, so there are few conflicts with events on those days. For evening games, they have adapted their systems and schedules to reduce conflicts. For weekday afternoon games, however, there are major conflicts with traffic congestion, building access, and truck parking. Parking is the biggest issue by far, as they estimate that 400 parking spaces have been lost in the area due to road construction and development.

RETAIL/SHOWROOM

We interviewed two retail showroom stores, one selling appliances and one selling doors and millwork. Both businesses reported that they had conflicts with afternoon events at the stadiums. The conflicts are related to traffic congestion and parking. In spite of these conflicts, the area is apparently a desirable site for such uses. The appliance store believes that they benefit from the walk-by traffic, both on game-day or for return visits. The millwork business reports that two other door/window distributors have located in the area in recent years.

SUMMARY

There are several common themes:

- Event attendees do patronize businesses in the immediate area of the stadiums.

- Parking is a perceived, if not real issue. Perceived shortages discourage regular customers on game days. The issue is most pressing in the area immediately around the stadium.

- Restaurants are the major attractions of event attendee spending. The benefits are most positive in Pioneer Square, and are insignificant if not negative in some areas of the International District.

- Certain retailers like the bookstore, carpet and apparel stores are beneficiaries of event-related activity. Retailers offering large or expensive items are less likely to make sales to walk-in patrons, and the extent of return business is inconsistent among the persons interviewed.

- Businesses that market to event attendees either through their products or promotions receive the greatest benefits.

- Business other than restaurants report that day games during the week are disruptive to their businesses, in terms of service to their regular customers and their ongoing operations.

- Businesses that require regular truck access for receiving and delivery are most affected by day game traffic and parking.

- Many businesses report adverse impacts from some sporting events attendees, including noise, litter, and urination. Such behavior is more frequently attributed to football game attendees.

IV. INTERVIEWS WITH PROPERTY OWNERS

We conducted interviews with representatives of seven property owners to discuss the impact of stadium events on their use and plans for their properties. The property owners are intended to reflect a range of property types and locations, but not a statistically valid sample. The persons interviewed are listed in Appendix 1. The information derived from the interviews is presented in this section by neighborhood.

PIONEER SQUARE

The property owners we interviewed have existing developed sites in the area and adjacent South Downtown neighborhoods. They have announced plans for large properties in the area (Kingdome North Parking Lot and Over Tracks Development for Nitze-Stagen; and WOSCA site and south of Dearborn properties for Urban Visions). The proposed developments embrace the stadiums with physical linkages and references. (The WOSCA development is referred to as Stadium West). The stadiums are considered to be amenities and activity generators for any new development on the subject sites.

INTERNATIONAL DISTRICT

The property owners we interviewed have multiple sites in the International District. Both persons interviewed considered proximity of the stadium as an overall advantage to potential businesses and demand for development on their properties. One owner commented specifically on demand for restaurants in the area by Mariner game attendees. The owner also indicated that their studies did not indicate that sports events and trade shows provide significant support for new lodging facilities.

LITTLE SAIGON

The property owner we interviewed owns a mixed use retail/residential building and three retail/office buildings. He does not identify stadium-related activity as being a major factor in the development potential of the area.

STADIUM TRANSITION AREA

We interviewed two owners of buildings within the area, and one with a site currently used primarily for parking. The owner of an industrial building that houses his warehouse operation acknowledges that the existing building and immediate area no longer can accommodate the large trucks and capacity associated with a modern 3rd party parking warehouse facility. He has moved much of his operation to the Kent Valley.

Afternoon baseball games create some conflicts for truck access and convenience, but those conflicts can be accommodated given the scale of operations. The owner reports a strong benefit from revenues available from game day parking on the site. The parking lot is managed on game day by a local parking operator.

The owner of a large lot used for parking by stadium events, has proposed to build a large office complex on the site. The project will be dependent upon attracting a major tenant for the buildings. At this time, the owner believes that it will be possible to attract such a tenant. The proximity to Safeco Field is considered a marketing plus for the project.

The owner of a mixed use building with residential and quasi-industrial tenants considers stadium activity to be destabilizing for the immediate area and the Greater Duwamish Manufacturing Industrial Center. He reports that he has lost two tenants because they couldn't get access to their premises for pick up and/or activity during sport events.

Representatives of the Port of Seattle expressed strong concern about the impact of stadium events on the movement of containers. The truck gate for Terminal 37-46 is located off Alaskan Way at Atlantic. Traffic congestion and pedestrian activity slows the movement of containers by truck, and creates a dangerous condition for truck traffic. Afternoon games create the greatest conflicts, because the period from 12:30 to 3:30 is a peak time for truck movements.

V. PARKING IMPACTS

Parking is identified by business and property owners as a major issue for stadium impact. Whether parking shortages are real or perceived, they affect businesses in the stadium area. The parking issue is explored in more detail in this section in terms of

Parking Statistics

Game Day Impacts

PARKING STATISTICS

The Puget Sound Regional Council (PSRC) has conducted a periodic inventory of the parking inventory in the Central Puget Sound Region. The earliest study was in 1996 and the most recent in 2004. This time period provides a baseline prior to the opening of Safeco Field, and a somewhat current point in time as well.

Table 10 summarizes charges in the parking inventory over the period. As shown, there are approximately 9,200 parking spaces in the three zones around the stadiums. The number of spaces has increased by 35% over the period 1996 through 2004. However, the number of spaces is well below the parking demand created by a sold out sporting event in one of the stadiums. The number of parking spaces in each of the three zones is well below the average for the Central Business District on a per acre basis.

Table 10

Off Street Parking Inventory

1996 to 2004

		1996	2004	% Change	Stalls/Acre 2004
Zone 1	Stadium Area	3,700	5,805	56.9%	31.1
Zone 2	International District	1,452	1,667	13.7	22.2
Zone 3	Pioneer Square	1,663	1,723	7.4	27.8
Total	CBD	53,146	54,035	1.7	53.9

Source: Puget Sound Regional Council, Parking Inventory for Central Puget Sound Region, 2004

Table 11 summarizes the breakdown of off-street parking according to whether it is reserved for employees or customers. As shown, International District and Pioneer Square have higher percentages of spaces reserved for employees and customers than the CBD as a whole.

Table 11

Parking Type – 2002

	Spaces				% of Total			
	Cust.	Empl.	Other	Total	Cust.	Empl.	Other	Total
Zone 1	17	82	5,706	5,806	.2	1.4	98.3	100.0
Zone 2	284	237	1,140	1,661	17.1	14.3	68.6	100.0
Zone 3	35	167	1,521	1,723	2.0	9.7	88.3	100.0
Total CBD	1,208	3,680	49,147	54,035	2.2	6.8	91.0	100.0

Source: Puget Sound Regional Council, Parking Inventory for Central Puget Sound Region, 2004

The average occupancy rate for off-street parking in each of the zones is summarized in Table 12. As shown, the occupancy in the zone around the stadium has decreased to 33.2% over the period. This result reflects the fact that the inventory increased because of the stadium, but the occupancy figures don't reflect event days. The International District and Pioneer Square both showed increased in utilization.

Table 12

Average Parking Occupancy

		1996	2004	% Change
Zone 1	Stadium Area	57.6%	33.2%	(42.4)%
Zone 2	International District	62.7	67.4	7.5
Zone 3	Pioneer Square	72.2	73.0	1.1
Total	CBD	80.3	63.9	120.4

Source: Puget Sound Regional Council, Parking Inventory for Central Puget Sound Region, 2004

Tables 13, 14, and 15 summarize the average hourly, daily, and monthly rates for the three parking zones and the CBD as a whole. The average rates for all time periods and all three zones are lower than the averages for the CBD, but all have grown at faster rates over the period 1996 to 2004.

Table 13

Average Hourly Rate

		1996	2004	% Change
Zone 1	Stadium Area	$3.69	$6.38	72.9%
Zone 2	International District	2.51	6.36	153.4
Zone 3	Pioneer Square	3.74	5.07	35.6
Total	CBD	5.68	7.40	30.3

Source: Puget Sound Regional Council, Parking Inventory for Central Puget Sound Region, 2004

Table 14

Average Daily Parking Cost

		1996	2004	% Change
Zone 1	Stadium Area	$5.17	$10.38	100.8%
Zone 2	International District	3.91	14.21	263.4
Zone 3	Pioneer Square	7.24	11.73	62.0
Total	CBD	11.2	15.72	42.6

Source: Puget Sound Regional Council, Parking Inventory for Central Puget Sound Region, 2004

Table 15

Average Monthly Parking Cost

		1996	2004	% Change
Zone 1	Stadium Area	$74.61	N/A	N/A
Zone 2	International District	57.94	130.71	125.6%
Zone 3	Pioneer Square	109.76	163.11	48.6
Total	CBD	147.10	213.52	45.2

Source: Puget Sound Regional Council, Parking Inventory for Central Puget Sound Region, 2004

GAME DAY IMPACTS

The pattern of parking demand varies by type of event and time of the event. Generally, attendees will begin arriving one hour to an hour and a half before a weekday game, but considerably earlier for a weekend football or baseball game. For a Sunday or evening game, on-street parking fills immediately.

The spatial distribution of demand varies with attendance. One parking lot operator we interviewed observed that:

- With the Kingdome, a crowd of 30,000 would fill up parking lots east to 3rd Avenue. A crowd of 60,000 would fill up lots past the freeway to the east.

- With Safeco Field, a sell-out crowd will fill Pioneer Square lots and International District lots east to 7th Avenue.

- With Qwest Field, a sell-out will fill up lots past the freeway.

Close in lots often adjust their fee based on expected attendance with rates of $25 or $30 for sell-out games.

This experience indicates that parking is relatively scarce in Pioneer Square and to a lesser extent International District. The high parking demands of a large event put tremendous pressure on the parking resource in terms of utilization and rental rates.

VI. PROPERTY VALUES

Changes in property values can reflect overall market supply/demand, local supply demand conditions, or changes in land use. Trends in land prices are described in this section in terms of specific land sales, and general trends.

LAND SALES

Land sales in the neighborhoods around the stadium for the period 1997 to 2005 are shown in Table 16. Generally, the number of sales is small. Sales since 2000 have ranged from $97 to $230 per square foot. The $97 price was for the Mosaic Apartment site (Now Asia Condominiums) with the building completed in 2002. The highest price of $230 per square foot was for the Silver Cloud site north of Safeco Field. The price is equivalent to $21,000 per hotel room, a realistic price for a hotel of that quality.

The land prices prior to 2000 were under $40 per square foot, except for the King County Building site in Pioneer Square. Other than the King County site, the properties were speculative or pioneering purchases. The WOSCA site is still undeveloped though there are plans and requirements for changes in zoning. The Uwajimaya and Union Station sites have since been developed with successful projects but were pioneering efforts at the time. The King County building site sale in Pioneer Square reflects a price for land in an established area and the price is similar to more recent transactions in the area.

GENERAL TRENDS

The King County Assessor regularly evaluates land price trends as part of their valuation efforts. The valuation background reports identify the value range for stadium area neighborhoods to be

International District		
1DM	75/85	$50-90/sq ft
1DM	100/120	85-90
1DR	150	90-100
Little Saigon/Central District		
C1	65	$15-60
1C	65	18-55
NC3	65	25-65
Pioneer Square		
PSM	85/120	$70-90
PSM	100	70-90
PSM	100/120	70-110

The Assessor reports for the periods 2002 through 2004 do not reflect any changes in the value range except in NC3 65, where the low end of the range was $20 in 2002.

The lack of identifiable increases is at least partly due to the lack of properties on the market. In general, however, it is difficult to attribute any significant pressure on land values, to the stadium, particularly in Pioneer Square, International District, and Little Saigon areas.

Table 16

Pioneer Square/International District Land Sales

Comp. No.	Location	Sale Date	Analysis Price	Area (Sq Ft)	Zoning	Price/ Sq Ft	
	Starbucks Office Building Site N. Corner 1st Ave. S/Alaskan Way.	Apr-06	$6,500,000	36,155	PSM-85-120	$180	Starbucks office site Price incl. entitlements/plans
	Allright Site 800 Block of 4th Ave. S.	Pending Land: Billboard:	$3,870,750 $3,185,750 $685,000	35,956	IC-65	$108 $89	Purchase by Monorail Subject to easements
	Sweazey-Miller Site Full block bounded by 4th & 5th, and Yesler & Washington St.	Oct-04	$10,080,000	57,600	IDM-100-120	$175	City of Seattle bought for new command center
	NEC 1st Ave. & Royal Brougham	Dec-04	$4,441,000	19,275	PSM-85-120	$230	Silver Cloud Hotel - 210 rooms
	Half block on east side of 5th Ave., between Main and Jackson St.	Feb-04	$3,100,000	27,000	IDM 75-85 IDR-150	$115	160 room hotel + 80 condos
	NEC Yesler Way & 6th Ave. S.	Sep-04	$2,500,000	21,600	IDR-150	$116	Retail/Residential planned
	210 Alaskan Way	Aug-03	$1,170,000	8,077	PSM-100	$145	Hotel site between WA & Main
	SWC Main St./Maynard Ave.	Jan-02	$1,500,000	14,400	IDR-150	$104	Parking lot
	NWC Lane St./7th Ave. S.	Jun-01	$1,400,000	14,460	IDM-75-85	$97	Apt/Retail bldg built '02
	801 1st Ave. 1st Ave., north of Royal Brougham	Jan-99	$10,097,344	302,305	IG2U-85	$33	WOSCA site
	1003 4th Ave. S.	Jun-98	$1,039,500	41,818	IG2U-85	$25	Allright Parking lot
	SEC 5th Ave. S./S. Lane St.	Jan-98	$2,070,000	56,137	IDM-75	$37	Uwajimaya assemblage
	NEC S. King St./2nd Ave. S.	Jun-97	$7,550,000	66,179	PSM-100	$114	King Co. bldg. Site
	East of 4th Ave. S., south of Jackson St.	Sep-97	$11,900,000	322,545	IDM-65	$37	Union Station site
	1531 Utah St.	Oct-98	$2,100,000	65,710	IG2U-85	$32	Coast Cranes site
	1528-2020 Alaskan Way S.	Jul-96	$2,687,847	74,384	Res	$36	Condo sites?

VII. HOUSING IMPACTS

Housing is an established use in Pioneer Square, the International District, and Little Saigon; but is allowed only as artist studio/dwelling units in existing buildings in the Stadium Transition Area. Housing issues are presented in this section in terms of housing market trends and stadium impacts.

HOUSING MARKET TRENDS

The City has compiled housing data for the Downtown Urban Center neighborhoods. The number of housing units and additions since 2000 are summarized in Table 16.

Table 17

Dwelling Units in Downtown Urban Center

	Dwelling Units – 2005	Increase Since 2000
Pioneer Square	902	147
International District/Chinatown	1,910	396
Belltown	8,256	2,885
Denny Triangle	1,340	496
Commercial Core	3,069	692
Downtown Urban Center	15,977	4,616

Source: City of Seattle, Department of Planning and Development

The dwelling unit numbers demonstrate the prominence of Belltown as the major residential concentration in Downtown. It accommodates 53% of all units and 63% of new units of the period 2000 to 2005. Pioneer Square has the lowest number of dwelling units in Downtown and the lowest increase. International District/Chinatown has the next lowest increases.

Market conditions in the stadium area are summarized in the following table.

Table 18

South Downtown Neighborhoods
Comparison of Economic Conditions

	Pioneer Square	Intl. Dist. Chinatown	Intl. Dist. Little Saigon	Stadium So. Dearborn
Residential				
Type	Renovation Market & Subsidy	Renov./New Market & Subsidy	New Market	N/A
Price Range-Apt. (mkt.)	$1.50-2.00/sf/mo.	$1.40-1.75/sf/mo.	$1.50/sf/mo.	
Price Range-Condo	$325-400/sf	$400-450/sf	$300-350/sf	

Residential development is occurring in Pioneer Square, Chinatown and little Saigon. In Pioneer Square, much of the development has been renovations. Recent projects included:

Lowman Building: Income restrictions

Terry Denny Building: Rental lofts

Corona: Rental lofts

New development is proposed for Trolley Barn site on Occidental, on the Kingdome North Parking Lot.

In the International District, new development includes

75 S Weller, (under construction)

Empress on Fifth:

Washington Terrace: Seniors

Seniors Nehomachi Terrace: Income restricted

The rent leader for the area is Uwajimaya Village with monthly rents of up to $1,800 for 6 bedroom unit. To date, the only condominium project was Fujisada on 5th Avenue. Units in the buildings are up for resale at $450,000 for a 1,000 square foot home. The Mosaic apartments recently sold, and units are now for sale as the Asia Condominiums at prices starting at $199,800 for studios and $339,000 for 2 bedroom.

There has been only a limited amount of residential development in Little Saigon. The Pacific Rim Center has condominiums available for $300,000 or more. 10 of the 40 units have sold with the remainder coming up for sale as leases expire.

STADIUM IMPACTS

While there is anecdotal evidence of stadium area residents being inconvenienced and frustrated by stadium event traffic, recent and proposed development projects include residential uses. Developers contacted during the ongoing Livable South Downtown planning study have identified housing as a very viable use in the future. The area offers the potential of an established residential and commercial district, with prices and rents that are lower than other urban center neighborhoods. Further, other uses like restaurants that are supported by stadium event attendees, are attractive to potential resident as well. Potential developers have generally identified the stadium as a benefit to potential residents.

VIII. CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

1. Businesses differ in the type and extent of impacts.

    - Many restaurants near the stadiums benefit from attendees at almost all events.

    - Many other businesses benefit from events at some times, weekday evenings, but not others, particularly weekday afternoons.

    - Many businesses don't benefit from event attendees, but can schedule their activities to minimize conflicts.

    - Some businesses, particularly those operating extended hours, seven days a week, have difficultly scheduling around events.

    With a few exceptions, businesses identified 1:35 PM weekday baseball games as the events that create the most conflict. Those events overlap with the operating hours for warehouse/transportation businesses, and create traffic during the evening commute.

2. Parking is the most frequent issue raised by business owners.

    - Attendees for major sports events absorb the available parking inventory extending east to I-5, north into the business core and south into the industrial area.

    - Non-event customers for area businesses are discouraged from patronizing those businesses during events.

    - Parking fees are frequently raised to two or more times their regular level.

3. Traffic congestion and control are major issues raised. While many interested parties acknowledge the challenge and support current efforts of traffic control, many identify specific actions that would increase traffic flow including relaxing restrictions on certain turning movements.

4. Business and property owners are largely in agreement that some sporting event attendees create problems in the area with noise, litter, and urination.

5. There has not been significant redevelopment or new development as a direct result of the stadiums.

   - A hotel is under construction north of Safeco Field. While the stadiums will generate room night activity for the hotel, other sources of demand will be necessary to sustain hotels throughout the South Downtown area over the course of a typical year.

   - There are major office proposals east of Safeco Field and over the tracks east of Qwest Field. The stadiums themselves do not generate demand for such uses, but do support restaurants and retail/services that are amenities for such development.

   - Housing development has occurred and is proposed in Pioneer Square and International District. Again, the stadiums themselves do not generate demand for such uses, but do support restaurants and retail/service businesses that are amenities for such development.

RECOMMENDATIONS

1. Work with Seattle Mariners to minimize the number of weekday afternoon games, and when possible schedule those games at 3:35 PM rather than 1:35 PM. While scheduling of games is dictated by agreements among Major League Baseball and the Players Association, the Mariners are required to get City approval beyond the 6 afternoon games covered in their agreements.

2. Develop coordinated strategy for parking in the neighborhoods around the stadiums. Extents of the strategy include:

   - Possible organizing entity for parking in the area.

   - Regulation of on-street parking.

   - Parking enforcement.

   - Parking fees.

   - Information on parking availability and directional signing.

3. Provide adequate staffing and efficient routs for directing vehicular traffic before and particularly after events. While the teams and the City regularly review and discuss traffic issues, they should continue to evaluate adequacy of staffing and restrictions on turning movements and traffic routes.

4. Provide convenient routes for pedestrian traffic that will minimize conflicts with vehicular traffic and business operations. A strategy would recognize adequacy

of sidewalks, business access to streets opened for pedestrian routes, and adequate crosswalks.

5. Provide facilities and staffing to minimize adverse impacts of event attendee behavior. Additional public restrooms and garbage cans could reduce impacts of littler and public urination. Additional police presence and enforcement could reduce the incidence of such behavior.

6. Further encourage outreach between teams and local businesses. Businesses that make an effort to serve attendees through their product/service offerings and promotions, can realize benefits while reducing negative impacts. The team can expand their efforts to promote and involve local businesses.

7. The City and public partners need to resolve the major transportation infrastructure projects in the area. Projects such as the Viaduct, SR 519, and freight mobility projects can alleviate conflicts between the warehouse/transportation businesses in the immediate area of the stadiums and the Duwamish Manufacturing Industrial Center.

APPENDIX 1

STADIUM IMPACT STUDY

LIST OF CONTACTS

Business Owners
- Tam Nguyen, Saigon Bistro
- Hiroshi Hibi, Uwajimaya
- Phil Chan, Seven Seas
- Kevin Cochrane, Millwork Supply
- Mike Olson, Merchants Parking
- Andy Cheim, Evergreen Chiropractic
- Theresa Reyna, Kim Ngoc Jewelry
- Jim Friedman, Direct Buying Service
- Tina Bueche, Synapse 206
- Tom McQuaid, Nordic Cold Storage
- Jason Handalay, Sound Produce
- Pejmun Mostafaui, Classic Rug Gallery
- Jeff Bieber, American Slate
- Jan Johnson, Teahouse
- Peter Aaaron, Elliot Bay Books
- Gay Enderson, New Orleans Restaurant
- Terry Derosier, Agate Design
- Craig Dyer, Olympic Reprographics
- Richard Chang, Kau Kau
- Gigi Gelfin, Northwest Fine Woodworking
- Mick McHugh, FX McRory's
- Ben Masin, Masin's Furniture
- Seth Howard, Collin's Pub
- Pheng Huang, Foster White
- Tom Hirsche, United Warehouse

Property Owners
- David Hutchhaesen, Bemis Building
- Bill Vivian, Home Plate Parking
- Chris Koh, Coho Real Estate
- Paul Liao, Pacific Rim Center
- John King, American Warehouse
- Tom Hirsche, United
- Allen Kurmura, Uwajimaya

Frank Stagen, Nitze-Stagen
Greg Smith, Urban Visions

Other
Susan Ranf, Seattle Mariners
David Young, Qwest Field
Joyce Pisnanout, International District Housing Alliance
Christine Wolfe and Linda Styrk, Port of Seattle