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U-District Retail Study & Strategy

prepared for the University District Partnership
by Downtown Works, LLC
September, 2014

U-District Retail Study & Strategy

Throughout the U.S., people are eager for urban experiences—they want to shop and dine in authentic places that are distinct from more conventional, often contrived options like malls and lifestyle centers. Though they will not wholly abandon other offerings, many area consumers will shift a number of their shopping and dining trips to a streetfront setting if it provides a compelling and unique mix of shops and restaurants in a welcoming, clean, and friendly environment. An urban place is able to serve its immediate area residents, workers and visitors while simultaneously drawing in people from a larger trade area.

U-District Retail Study
PHASE I

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2013 Assessment of U-District Challenges & Assets

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1. U-District Challenges

Our team assessed Seattle's University District, with an emphasis on University Avenue, in early 2013. We observed the following challenges to fostering a vibrant, people-attracting shopping and dining climate in the area:

- **The current mix of shops and eateries is extremely narrow**; this was noted in a study conducted in 2003 and remains true today. The Ave is marked by loads of fast/quick food operators and is particularly saturated with Asian/noodle spots. In speaking with area landlords we also learned that The Ave tends have a high rate of operator turnover.

- By and large, **buildings and facades along The Avenue are unattractive and uninteresting.** There appears to have been scant investment in buildings over the years, and in many cases original facades have been disfigured. New construction tends to be boring and not supportive of retail, with features like setbacks and tinted windows.
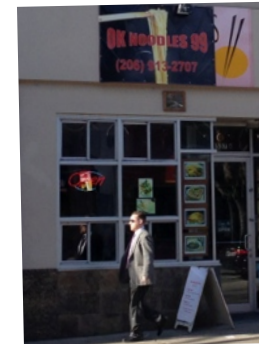
The mix of operations along The Ave is heavily skewed towards fast/quick food operators, in particular with loads of Asian/noodle spots.

In many cases, older buildings along The Avenue are poorly maintained, while new construction—marked by uniformity, setbacks and/or tinted windows—is not supportive of retail.

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- **The maintenance standards of assets along The Ave are quite low.** Overall the street presents itself as unkempt and dirty, with street elements in poor shape, and deplorable building conditions.
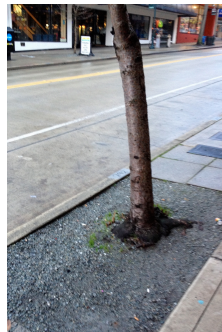
- **The Ave is marked by visual clutter,** with an overabundance of signage, neon open signs (it should be clear that a business is open without the use of these types of signs), and colossal sandwich board signs.

- **The district's key corner—at 45th and University Way—key corner has two banks,** one of which presents entirely blank walls to the street (a killer for a retail district).

- **Today there is no one entity charged with building consensus on improving the U-District.** Instead, a committee model makes it difficult to get things accomplished.

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2. U-District Assets

- **The U-District enjoys easy access—**far more so than neighborhoods such as Fremont, Ballard, and Madison Park.

- **The coming light-rail service and station** will make the district even more accessible, and ensure it remains that way for the foreseeable future. And development spurred in part by the light rail station will be a benefit to the overall district.

- **The significant presence of the prestigious University of Washington** is a major asset that has historically been leveraged—never more so than today.
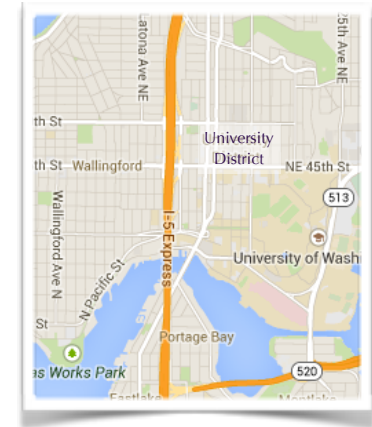
University District Farmer's Market

- **Farmer's markets are hot commodities, and the U-District's is one of the best.** Twenty-five percent of its customers are aged 51-60, strong years for consumption; this illustrates that people other than UW students and faculty will patronize the district if given a compelling reason to do so.

- **Residential neighborhoods such as Ravenna, Bryant and Laurelhurst surround the U-District.** Many are quite dense, and all skew towards healthy household incomes.

- **The opportunity for significant mixed-use development exists in the U-District** (and there has been a great deal of activity in particular north of 45th and around 11th/12th Avenues).

- To a large degree, **the building stock in the district, and especially lining The Ave, is quite human-scaled** and conducive to shopping and dining uses.

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- As noted earlier, the merchandise mix in the district, and particularly along The Ave, is narrow—it is heavily skewed towards quick/casual food operations, many with poor maintenance standards. Nonetheless, **a number of well-branded, well-maintained operations (some quick/casual food eateries among these) are present,** indicating that the district can be a good place to do business. *(Bonus points go to a number of dog-friendly operators!)*

A number of well-branded, well-maintained operations are doing business in the U-District.

Red Light is one of several high-quality resale stores located in the U-District.

- **A cluster of resale stores are located in the U-District**—they have great reputations and enjoy strong followings.

- The committee model notwithstanding, **there are very committed players (landlords, business operators, the UW) striving to improve the U-District.** The newly formed U-District Partnership will play the critical role of building a strategy for improving the district and getting the stakeholders on board with it.

U-District Asset **&** Challenge…

students

- U-District students represent an important consumer group, yet the amount of operations aimed at them is not supportable.

For recommendations on addressing the identified challenges, refer to pages 28-30 of this report.

U-District Retail Study
PHASE II

2013 U-District Market Analysis

Understanding the target market of consumers for a given district is important for creating a mix of shops, restaurants, and entertainment options that they wish to patronize. This report defines and analyzes the primary and secondary trade areas and target markets for Seattle's University District.   It includes:

1. Demographics—Primary + Secondary Trade Areas

The map at right shows the total trade area for the U-District—the blue-shaded portion indicates the **primary trade area**, while the green indicates the **secondary trade area**.

Today, the population of the total trade area is 800,440; it is comprised of those living within a reasonable distance of the U-District and includes groups of residents inclined to patronize shops and restaurants in an urban setting. By 2018 the population is expected to increase by nearly 60,000; areas with growing populations are of interest to independent and national retailers. While they still like to see strong co-tenancies and sales numbers, the growing population is a data point they'll consider when making location decisions.

Trade Area Population

	TOTAL trade area	PRIMARY trade area	SECONDARY trade area
2013 Estimated	800,440	183,667	616,773
2018 Forecast	858,319	195,017	663,302
2013-2018 Increase	7.2%	6.2%	7.5%

U-District Trade Area

PRIMARY trade area

SECONDARY trade area

U-District Total Trade Area Pop. = 800,440

Source: ESRI Business Solutions; 2010 US Census; Downtown Works
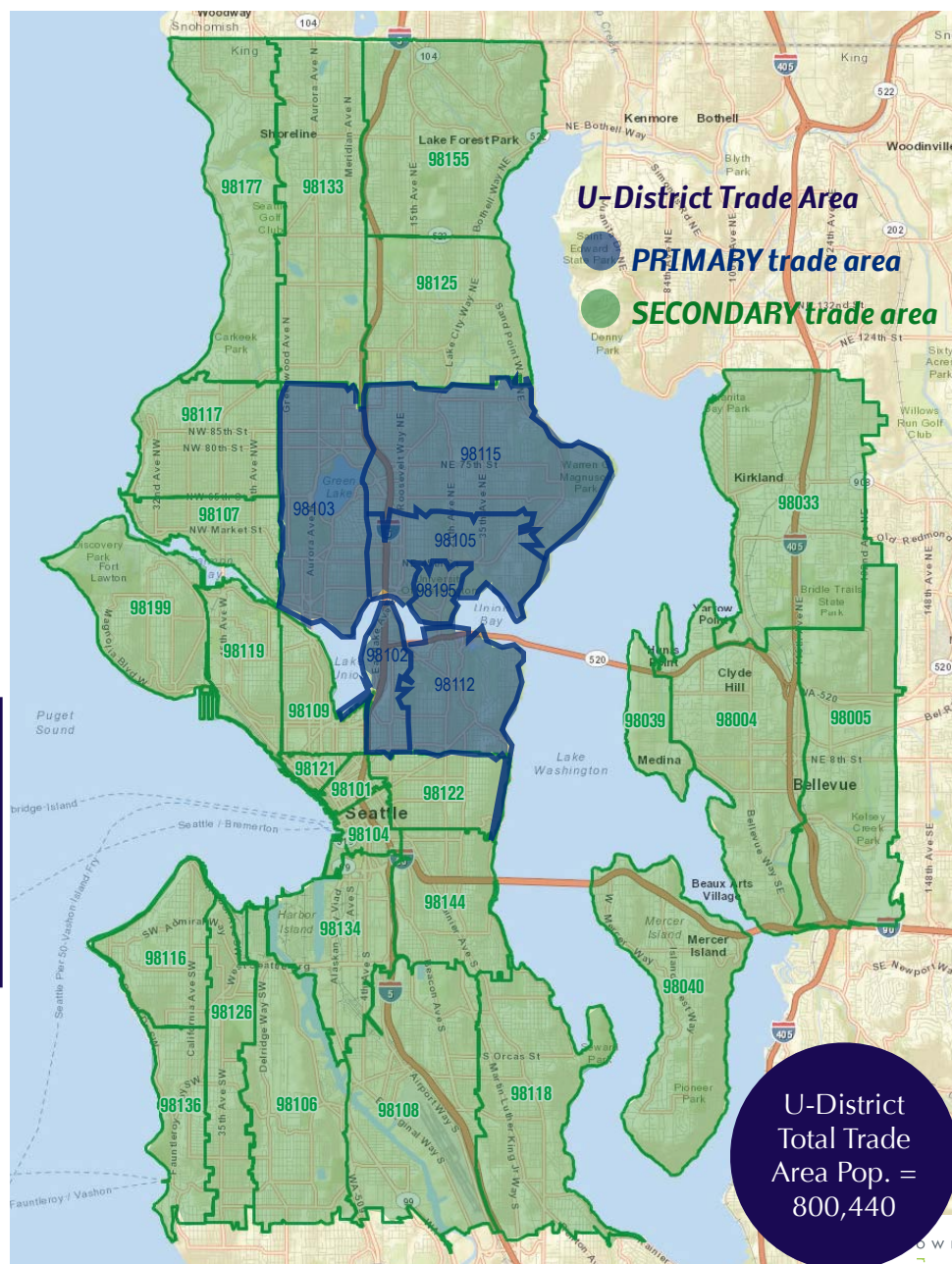
Average Household Income

	PRIMARY trade area	SECONDARY trade area
2013 Estimated	$94,036	$88,757
2018 Forecast	$115,853	$107,461
2013-2018 Increase	23.2%	21.1%

Key statistics:

- Nearly 50% of primary and secondary trade area residents between the ages of 25 and 54, strong years for consumption.

- The average household income of $94,036 in the primary trade area is particularly high; by comparison, the average income for all US households is $71,842.

- 43% of all households in the primary and secondary trade areas annually earn $75,000 and up.

- 16% of primary and secondary trade area households annually earn between $50,000 and $75,000. While not top earners, many of these people spend nearly all their discretionary income on themselves.

- The University of Washington's total student population at its U-District campus is nearly 44,000.

- There are just over 20,000 immediate area workers (within zip codes 98195 and 98105).

Households by Income

	PRIMARY trade area		SECONDARY trade area	
	2013 estimated	2018 forecast	2013 estimated	2018 forecast
$50-$74.9k	16.1%	13.6%	15.9%	13.5%
$75-$99.9k	11.6%	14.3%	12.9%	15.7%
$100-$149.9k	16.2%	19.5%	16.5%	20.1%
$150-$199.9k	7.1%	9.2%	6.2%	8.1%
$200k +	8.6%	9.8%	7.2%	8.0%

43.5% (primary, 2013) / 42.8% (secondary, 2013)

Today, 43% of all households in the primary and secondary trade areas annually earn $75,000 and up.

Age Distribution

	PRIMARY trade area		SECONDARY trade area	
	2013 estimated	2018 forecast	2013 estimated	2018 forecast
Age 15-24	18.9%	18.1%	11.3%	10.9%
Age 25-34	22.4%	21.0%	17.5%	16.9%
Age 35-44	15.1%	15.0%	15.4%	14.6%
Age 45-54	11.5%	11.5%	14.4%	13.7%
Age 55-64	10.6%	10.7%	13.0%	13.2%
Age 65-74	5.6%	7.1%	7.3%	9.1%
Age 75-84	2.4%	2.8%	3.9%	4.4%

49% (primary, 2013) / 47.3% (secondary, 2013)

Today, nearly half of primary and secondary trade area residents are between the ages of 25 and 54.

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2. Primary Trade Area— Psychographics & Primary Target Market

The total population in the U-District's Primary Trade Area is 183,667. As shown at right, its primary target market (PTM) *psychographic* groups make up 86% of primary trade area households; their members include those inclined to shop and dine in an urban setting if the right product—a critical mass of distinct, quality operators—is offered.

The bulk of the PTM is comprised of people who are active, electronically savvy, and strive to be current. Some are more affluent than others, yet they all have disposable income which they tend to spend on the latest in electronics, apparel, activewear, meals out, movies ,concerts and, in some cases, home furnishings.

Metro Renters make up nearly a third—30.4%—of the PTM. Because they aren't yet homeowners, they don't spend their money on investment-grade furniture (though they do shop at places like CB2). Nonetheless, they are avid shoppers and diners—they spend nearly all their discretionary income on themselves.

Urban Chic and Trendsetters together represent 30.6% of the target market. Members of these groups are affluent and like to spend their money.

Two PTM groups—Top Rung and Connoisseurs—are the top two most affluent of all ESRI's 65 consumer groups. These two groups comprise 8.3% of the PTM. They buy high-quality clothing and home goods, and frequent top restaurants.

Descriptions of each of the eight groups that comprise the U-District's PTM are included on the following pages.

U-District Primary Target Market (PTM)
(as percent of PRIMARY TRADE AREA households)

	U-DISTRICT PTM	U.S.
• Metro Renters	30.4%	1.6%
• Urban Chic	15.7%	1.4%
• Trendsetters	14.9%	1.2%
• Laptops & Lattes	11.3%	1.0%
• Connoisseurs	6.7%	1.3%
• Metropolitans	5.6%	1.4%
• Top Rung	1.6%	0.9%

PTM =

86% of primary trade area households

(vs. 9% in U.S.)

Psychographics explained: Demographic statistics cross-tabulated with information on lifestyles, attitudes and behaviors lead to **psychographic** profiles of a population. These profiles consider:

▸ *Occupation and education level*
▸ *Preferred activities and spending habits*
▸ *Stage of life*

For this analysis we have assessed data from ESRI, which segments the entire U.S. population into 65 unique psychographic groups.

Source: ESRI Business Solutions; 2010 US Census; Downtown Works

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U-District Primary Target Market Groups

Metro Renters 30.4%
- Young, educated singles starting their careers
- Highly educated: 1 in 4 holds graduate degrees
- Need to be where the action is and are avid shoppers/diners
- Because they rent, home products are not a priority, though they will buy furniture from stores such as CB2 or Pier One Imports
- Shop at traditional stores, independents and online
- Work out regularly and are active in sports
- Own electronics, laptops; seldom watch TV
- Spend most of their discretionary income on themselves

Urban Chic 15.7%
- Professionals who live stylishly and are well-educated
- Focus on both quality and style
- Stay fit, eat organic and drink imported
- Dine out all the time yet have well equipped kitchens
- Shop in upscale stores
- Active consumers, emphasize organic-sustainable goods/services + craftsmanship/artisanship; favor local operators over chains
- One of the top groups to own Apple products

Trendsetters 14.9%
- Young, diverse and mobile
- Educated professionals who have substantive jobs
- Spenders who love to shop in stores
- Fashion conscious and stay current on trends
- Other groups follow them!

Laptops and Lattes 11.3%
- Tend to be in late 30s to mid 40s
- Live urban lifestyles (30% do not own cars)
- More than 70% have bachelors or graduate degrees
- Are well read and well traveled
- Dine out all the time, shop Target for necessities, and buy luxuries at high end department and home stores
- One of top markets to own iPod, laptop or notebook
- Exercise and eat healthy foods

Connoisseurs 6.7%
- Couples in their 40s and 50s
- Third most affluent psychographic segment—they are well-educated and well-paid
- Seek out quality
- Dress well and have beautifully decorated homes
- Eat out several times a week (occasionally cook at home for fun)
- Have the latest in gadgetry and like labels
- Buy the latest sports apparel to look good

Metropolitans 5.6%
- Live in older city neighborhoods
- More than 75% over the age of 25 have attended college
- Median age is 37.6; just 40% are married
- Live in single family homes and in multi-unit buildings
- Active, urbane lifestyle
- Up on women's fashion
- Practice yoga
- Prefer Apple products

Top Rung 1.6%
- Mature, highly educated, married couples
- Is the wealthiest consumer market
- Shoppers—they buy the "best of the best"
- Frequently upgrade their electronics

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3. Secondary Trade Area— Psychographics & Secondary Target Market

As shown at right, the U-District's psychographic secondary target market (STM) groups make up 63% of secondary trade area households. The STM's groups are the same as those within the PTM, with the exception of Top Rung; this group is not in the top ten groups within the secondary trade area, hence it is not included in the STM.

U-District Secondary Target Market (STM)
(as percent of SECONDARY TRADE AREA households)

	U-DISTRICT STM	U.S.
• Metro Renters	18.5%	1.6%
• Urban Chic	14.4%	1.4%
• Trendsetters	14.3%	1.2%
• Laptops & Lattes	5.7%	1.0%
• Connoisseurs	5.1%	1.3%
• Metropolitans	5.0%	1.4%

STM =

63% of secondary trade area households

(vs. 8% in U.S.)
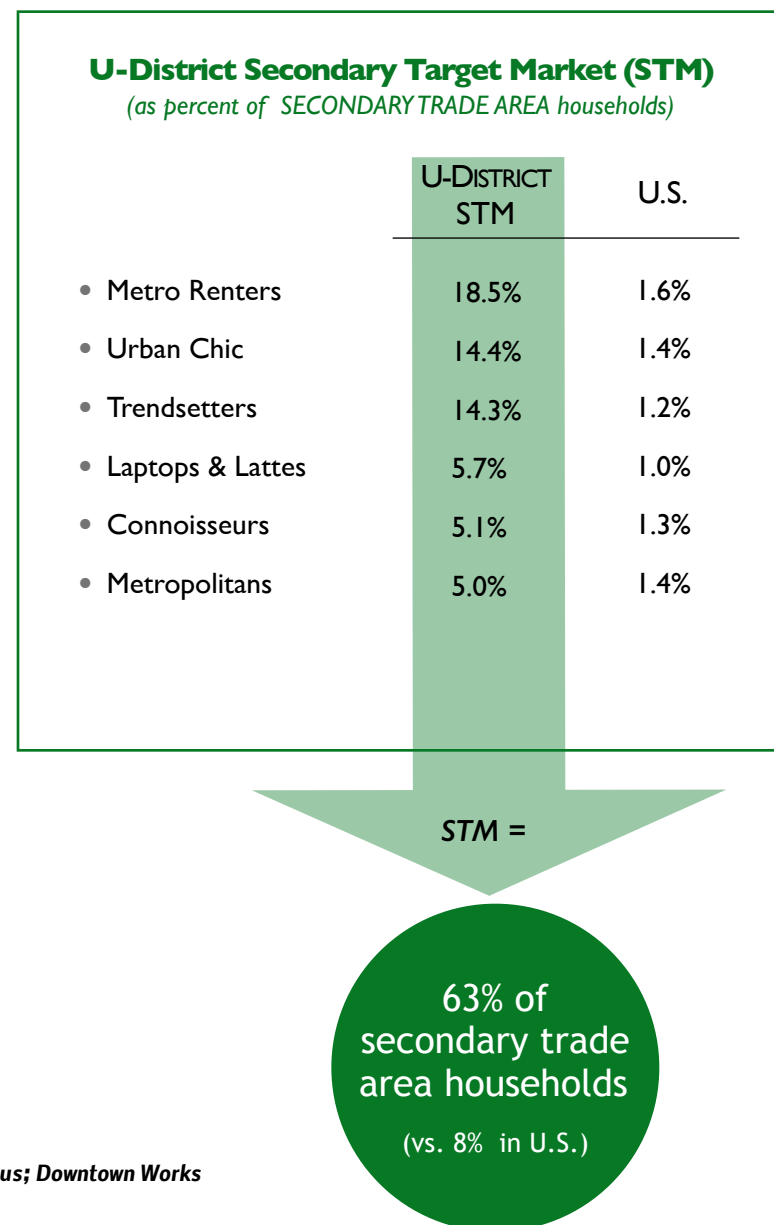
Source: ESRI Business Solutions; 2010 US Census; Downtown Works

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4. Conclusion

Both the primary and secondary trade areas contain an abundance of urban-inclined people.

- The target market groups are active, well-educated, well-read and well-traveled.

- Entertainment is important to all of the target groups. Much of this is connected to the sophisticated electronic devices they buy and upgrade with frequency.

- Some of those in the target market groups will harbor a sensitivity to price. And while they value local retailers, they also like to trade with brands they know.

- Nearly all those in the target groups enjoy dining out often, for the most part at trendy restaurants.

- The target groups are made up of people who are active (workout and play sports), fit and health conscious.

- For many of those in the target groups, disposable income is spent on maintaining the lifestyle of "it's about me." They are not terribly interested in what others think.

In addition to conducting the demographic and psychographic research, we also spoke with a half-dozen U-District operators that serve as destinations. We learned that these operators are drawing customers from both the primary and secondary trade areas, and are also attracting visitors. Additional quality uses would help create a critical mass of operations capable of drawing a larger number of consumers to the district.

U-District Retail Study
PHASE III

2014 U-District Strategy & Implementation

1. District Nodes

The boundaries of the University District are a bit informal (as is typical of many Seattle districts), though it is commonly accepted that the district is bordered by Interstate 5 to the west; 25th Avenue NE to the east; the Lake Washington Ship Canal to the south; and on the north by NE Ravenna Boulevard.

- The southern portion is heavily campus related, and the dominant street is NE Campus Parkway, a wide, boulevard-type passageway divided by a median with heavy bus traffic. The UW has opened a number of operations—eateries, a grocery store—in this area to serve students and faculty that are also open to the public.

- Brooklyn Avenue is currently closed due to construction of the light-rail station, but when it reopens there should be commercial space focused on impulse-oriented goods and food surrounding it.

- 11th Avenue north of 45th Street is very residential. Work/live units at the SE corner of 47th & 11th appear to be mostly empty, while some are part of new residential under construction.

- The North end of The Ave is generally in poor condition—it needs much work and redevelopment. Some recent developments include the Park Modern, which is well designed and houses Herkimer Coffee and a hair salon, both good uses, as well as Muriel's Landing which houses Araya's. The area can improve, but controlling retail design should be a priority as existing single story buildings are demolished and replaced with larger ones. This end of The Ave is also home to the Farmer's Market.

- 45th and 50th Streets both serve as transportation corridors, and as such will not be primary retail streets. Some blocks along 45th have been developed like typical suburban strip centers, which should not be permitted on an urban streetfront—parking should be located in the back with storefronts contiguous with sidewalks.

- Roosevelt is another thruway, and not a pedestrian-friendly street. At its southern end is Portage Bay Cafe, which is well-designed and has quite a following, serving as a destination use.

- University Way—The Ave—is the focus area for contiguous retail in the U-District. The following pages cover the assessment of The Ave.
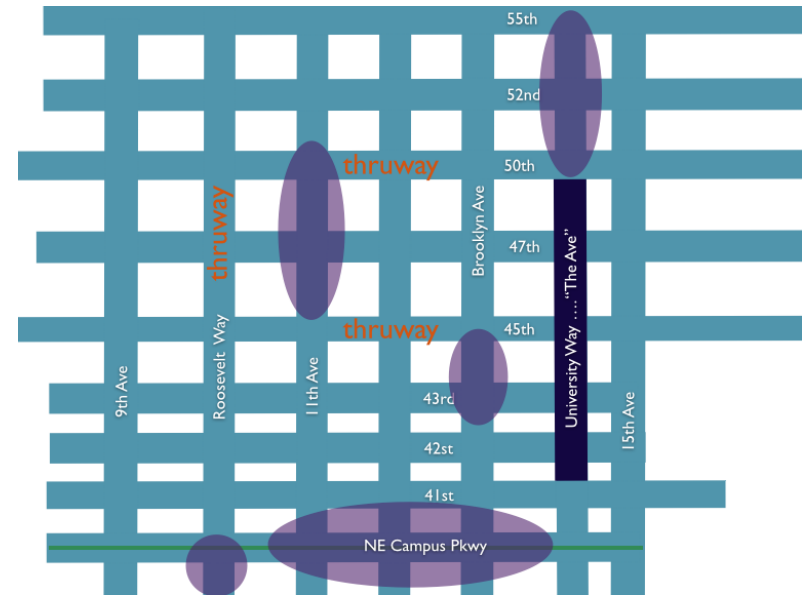
2. Quantitative + Qualitative Assessment of Focus Area

Understanding the existing mix of operators—both quantifying the types of uses as well as assessing their quality—is important when seeking to improve a commercial area.

QUANTITATIVE Assessment

Uses of 167 streetfront spaces in the focus area for this project, identified as University Way from 41st to 50th Streets:

- Food & beverage operations account for a little under half—44%—of uses.
- A quarter of uses are other retail (the likes of discount, gifts, framing, nutrition, phone, convenience).
- Just under a quarter —23%—of uses are either vacant or filled with non-retail uses (building lobbies, banks, offices).
- Apparel, shoes, and accessories make up a scant 8% of uses.
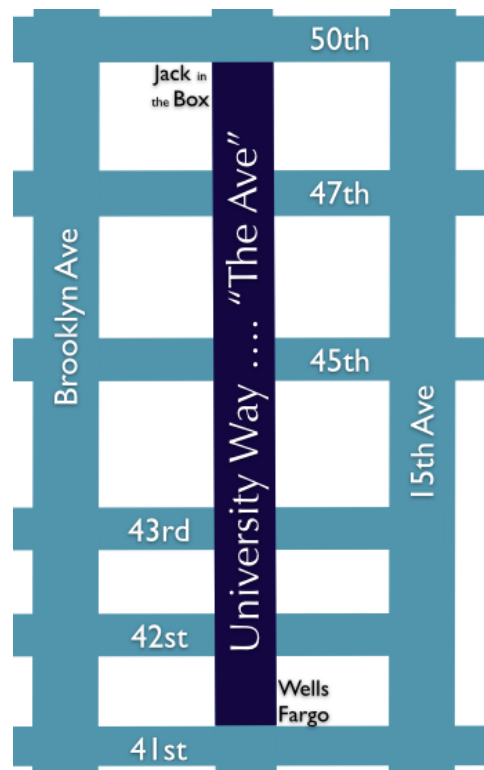
Focus Area—
"The Ave" from 41st to 50th

Existing Mix—167 spaces
July, 2014

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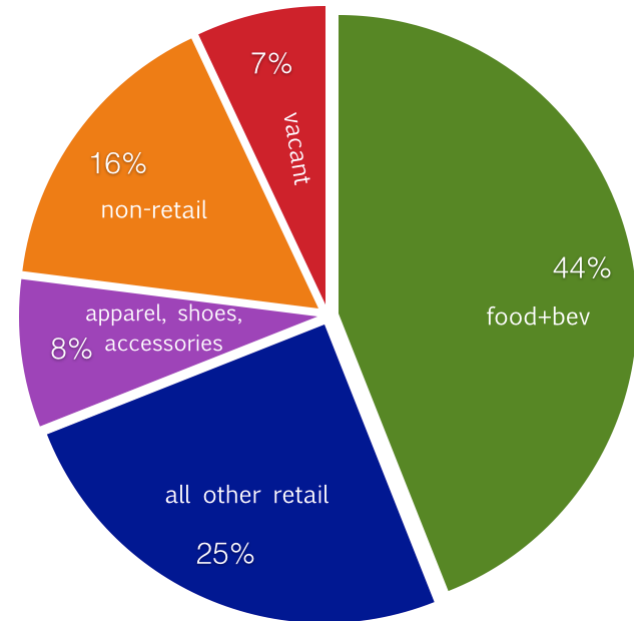
Food+Bev Mix—*44% of all 167 uses*

We analyzed the mix of 73 food and beverage operations by category, and found the following:
- Nearly two-thirds—64%—are quick/fast food operations.
  - More than half of the quick/fast food operations—54%—are Asian cuisine.
- Just under a quarter—23%—fall into the coffee/tea/yogurt/dessert category.
- Only 12% are full-service restaurants/bars.
- There is just one nightclub-type operation, a karaoke bar.

Overall Food+Bev Mix
July, 2014

1%
nightclub
12%
restaurants
23%
coffee, tea,
yogurt, dessert
quick/fast food
64%
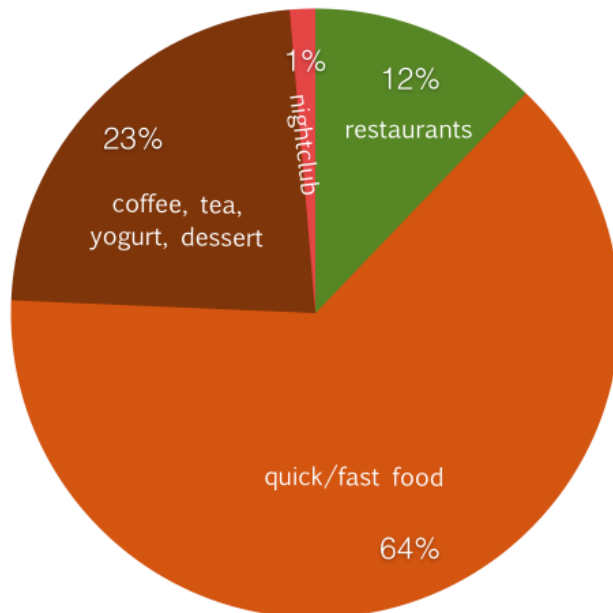
Breakdown within Quick/Fast Food
July, 2014

pizza
2%
latin
2%
american
2%
indian
7%
mediterranean
7%
burger
9%
asian
54%
fast food
17%
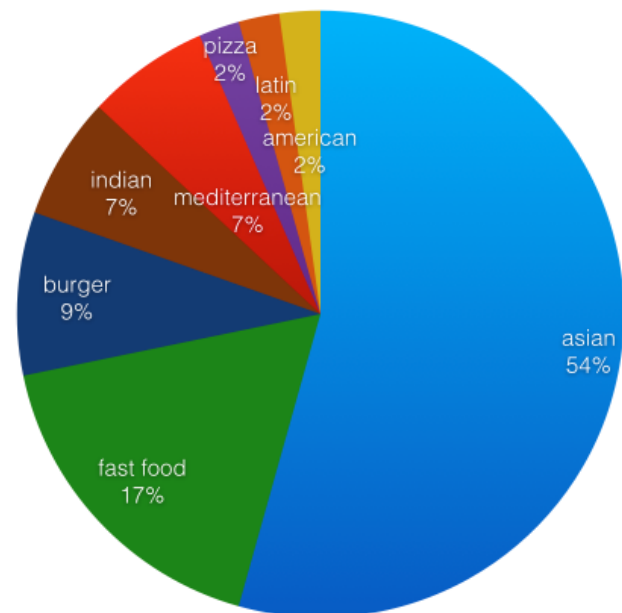
Store Mix—*33% of *<u>all</u>* 167 uses*

We analyzed the mix of 55 store operations by category, and found the following:
- One quarter are apparel/shoes/accessories stores; this includes six consignment stores.
- 40% are all other retail—smokes shops, copy/print, phone, electronics, etc.
- 16% are personal services such as salons, barber shops, and nail parlors.
- One fifth are businesses selling home goods, convenience, grocery or discount stores.

Pie chart categories: apparel, shoes, accessories; includes 6 consignment — 25%; other i.e., smoke shops, copy, phone, electronics — 40%; salon, barber, nails — 16%; home-focused — 7%; convenience — 7%; grocer — 4%; discount — 2%
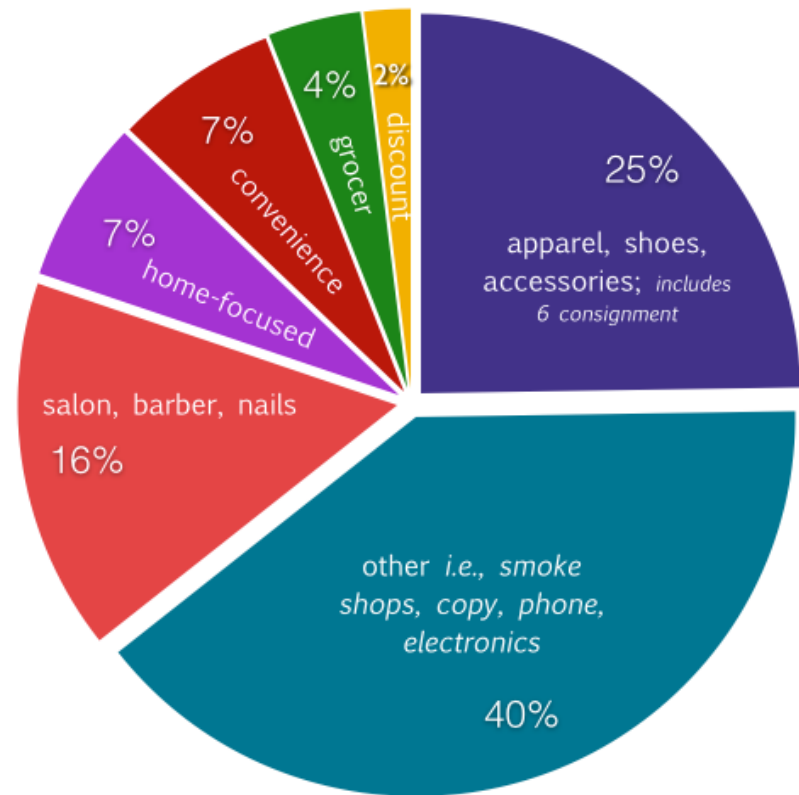
QUALITATIVE Assessment

"Healthy" commercial districts are often defined from the standpoint of occupancy; if the occupancy rate is very high, say 90% or more, it is considered healthy. But the *quality* and *condition* of the operations is at least as important as the number of filled storefronts—a fully occupied district with poorly designed, signed, cleaned, and merchandised operations, or with an overly narrow merchandise mix, is far from healthy. The foregoing *quantitative* snapshot must be considered in combination with a *qualitative* assessment of uses; together these provide a more complete view of the health of the retail along The Ave.

We conducted a qualitative assessment (QA) of the 128 shops, restaurants and personal services within the focus area, evaluating these operations in 5 categories:

‣ facade
‣ signage
‣ exterior maintenance
‣ window display
‣ interior

> *operations are scored on a 4-point scale in each category — 1=poor, 2=fair, 3=good, 4=excellent*
> **highest possible score: 20   lowest possible score: 5**

Total shops, restaurants and personal services: 128

Average QA score: 9.1 points (out of a possible 20)—collectively the operations are a few points BELOW "good" in terms of the experience they offer to consumers.

While 6 operations scored 16 points or higher, and another 39 scored 11-15 points, the great majority of operations (83) scored 10 points or less, making them below standards in terms of the experience they offer.

19 operations (15%) scored 0-5 pts = well below standards

64 operations (50%) scored 6-10 pts = below standards

39 operations (30%) scored 11-15 pts = can & must improve

6 operations (5%) scored 16-20 pts = good to great!

Qualitative Assessment
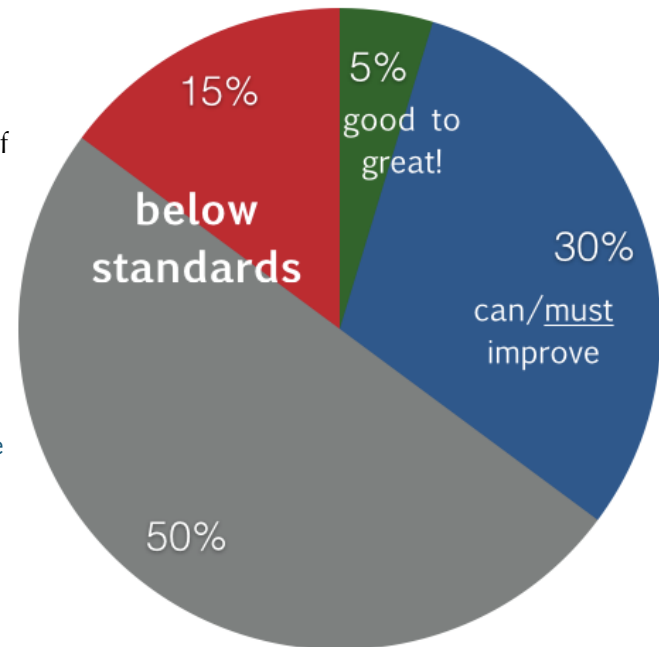
65% of uses scored 10 points or less

The above are examples of conditions of businesses that scored 10 points or less on the QA and are considered below standards.

30% of uses scored 11-15 points

The above are example businesses that scored 11-15 points on the QA; in many cases, with some adjustments and by addressing maintenance issues these stores and eateries can improve the experience they offer.

5% of uses scored 16-20 points

The above businesses scored 16-20 points on the QA; they are well-branded, well-maintained on the exterior and clean and tidy, well-designed and merchandised on the interior..

From one block to the next there was only a small difference in average scores, with 9.6 being the highest in the 4300 block, and 8.4 the lowest in the 4700 block.

Average scores by category (each is out of a possible 4 points):

2.1 interior

1.9 facade

1.8 signage

1.7 exterior maintenance

1.6 window display

Qualitative Assessment—why does it matter?

Operations that are thoughtful about their exterior design and branding will create a storefront that grabs the attention of passersby, and if it offers a quality experience once inside will get them to not only be customers that day, but to return. So the look and feel of a store or restaurant is integral to its success. But it's not just about the success of the individual operator, but the district as a whole. The individual businesses collectively create a look and feel for the district and an overarching experience that can set it apart—for good or bad—from the competition.
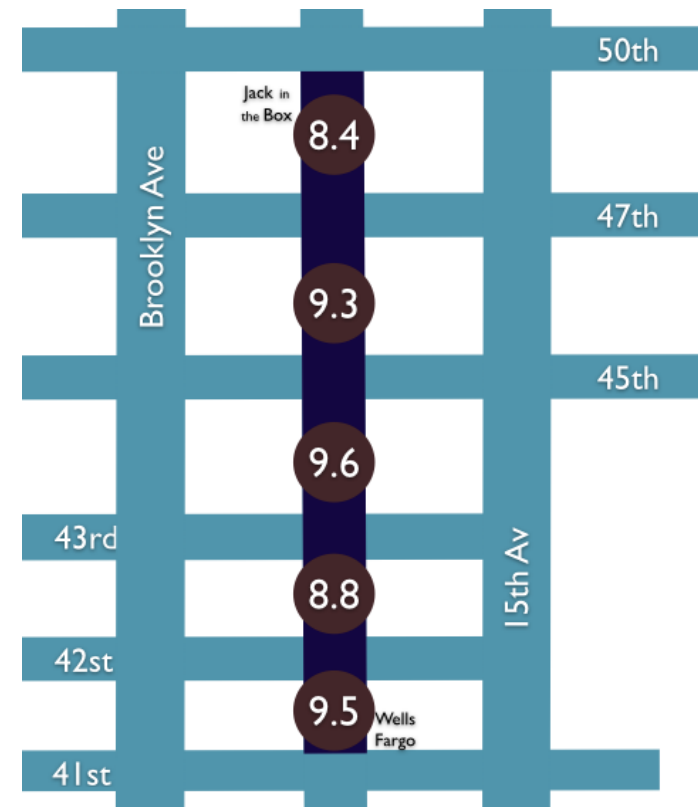
At left, a quick/casual operator with an affordable price point presents a visually cluttered face to the street. At right, an eatery with a very similar price point uses simple, inexpensive treatments to draw the eye and stand out from its neighboring operator.

What can be done in the U-District to improve the look and feel it offers? Focus particularly on the operations that scored in the range of 11-15, as with a few tweaks they can be lifted into the range of "good to great":

- Window display, interior merchandising—educate through workshops and in-store merchandising consultations.
- Facade, signage—explore grant/loan programs for existing operators. Develop retail-centric design criteria to guide new operators. Suggest all operators—existing and new—read Paco Underhill's "Why We Buy, the Science of Shopping."
- Exterior maintenance—discuss with landlords and suggest they include requirements in leases and enforce them.

facades
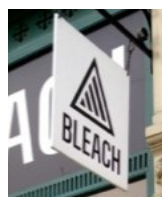
signage

What makes a great retailer?

Great retailers have distinctive facades that draw people in; signage that is succinct and eye-catching; engaging and frequently changed window displays; and a sought-after selection of focused merchandise in appropriate quantities.

The above retail principles are further illustrated in "What Makes a Great Retailer" found in the appendix.

windows

interiors

3. Merchandise Mix Plan

Urban districts with unique, clustered collections of shops and eateries serve not just the people who live and work in the immediate vicinity but also attract urban-inclined consumers from a wider trade area.

To achieve a district that is active both during the day and into the evening, the mix of shops and restaurants in the focus area must be a balance of high-quality daytime and nighttime uses emphasizing independent operators; any nationals should be solely those not over-represented in the market. Services—such as dry cleaners or copy shops—are important as they serve district workers and residents; as much as possible, these should not be located in the primary focus area of The Ave from 41st to 50th, rather on other blocks and streets within the U-District.

The categories and types of operations appropriate for The Ave are noted below.

The Ave Merchandise Mix

existing   **vs.**   **goal**

eatery	apparel/ accessory	other retail	personal
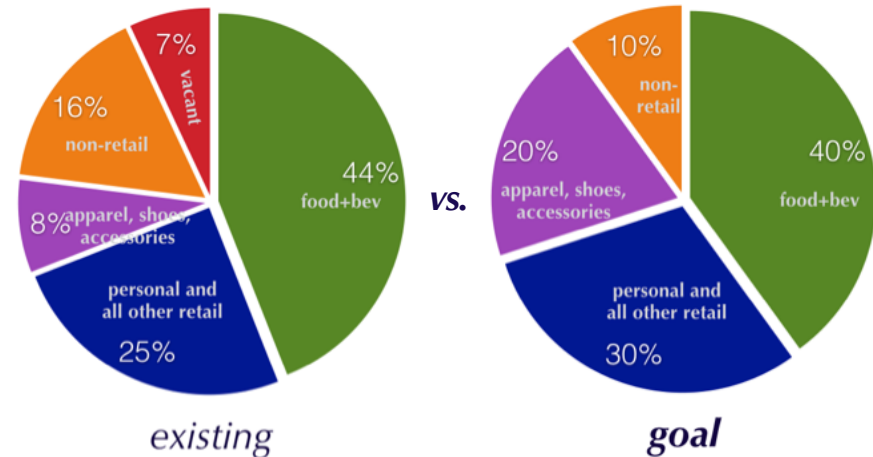
- full-service, mid-price point
- fresh/unique concepts
- chef-driven
- neighborhood
- in-demand, local quick/casual concepts (á la Marination Station)
- delicatessen/cafe

- specialty apparel
- athletic/fitness
- shoes/accessories
- fashion jewelry
- eyeglasses

- gifts & home accents
- garden shop
- mercantile
- tech/travel/office
- art supplies
- pet food/accessory
- bike store/repair

- makeup
- salon
- barber shop
- massage therapy

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The Ave Food Mix

As noted earlier, in terms of eateries The Ave today is heavily dominated by quick/fast food operations—these account for 64% of all food uses; more than half (54%) of these quick/fast food operations offer asian cuisine.

Overtime the mix should be balanced in favor of full-service eateries rather than fast food, resembling the pie chart at right below, the "goal."

Food Mix

1%
12% restaurants
23% coffee, tea, yogurt, dessert
nightclub
quick/fast food
64%

vs.

1%
restaurants
27% coffee, tea, yogurt, dessert
nightclub
40%
quick/fast food
32%

existing

goal
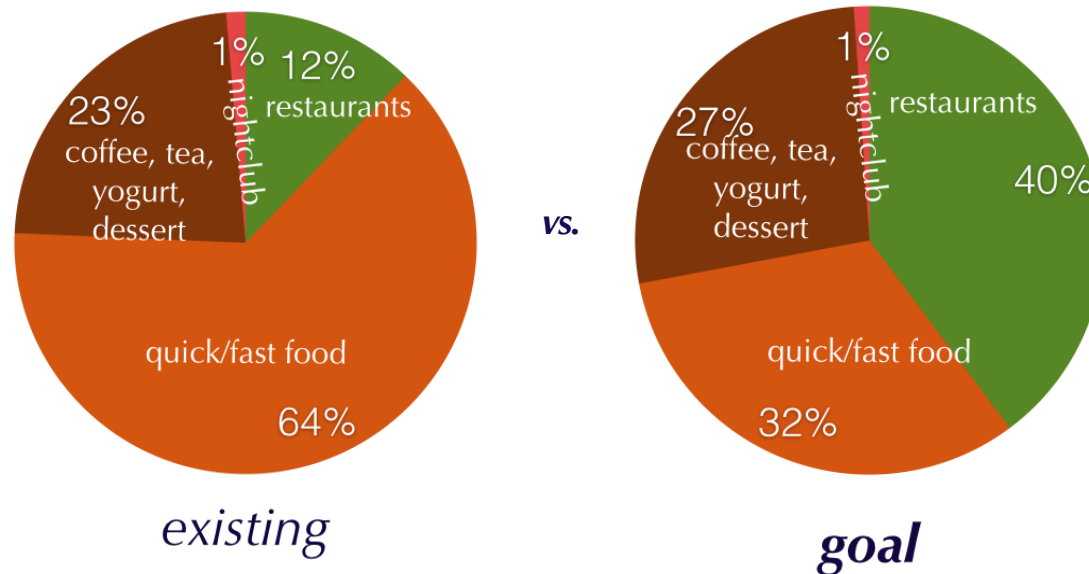
New operators to seek out for The Ave should have high standards and an explicit identity. More good operators will "up the ante"—existing low-quality ones will either improve or leave.   Existing high-quality operators will benefit from having good new neighbors.

MAGNETS, NEUTRALS & INHIBITORS

- **magnets** draw other quality operators to the area
  - *well-executed independent concepts*
  - *nationals that put just one store in a market*

- neutrals neither leverage nor discourage quality operators from locating nearby
  - *local operators that are of reasonable quality*
  - *national stores that already exist in the market but with few locations*

- inhibitors prevent quality operators from locating in a given area
  - *poor quality local operators*
  - *fast food outlets*
  - *too many banks*
  - *low-end outlet/discount stores*

every deal is critical!   *ideal* = each deal *leverages* the next, at minimum = no deals that *inhibit* the next

magnets draw other quality operators to the district

- Local food eatery Skillet would be considered a *Magnet*—when it locates somewhere other quality shop and restaurant operators take notice. Nationally, an operator such as Anthropologie would be considered a magnet.

neutrals neither leverage nor discourage deals

- An operator like Starbucks would be considered a *Neutral*—while quality operators would locate next to a Starbucks, their interest in a district would not be piqued because of it.

inhibitors repel quality operators

- Some operators are considered *Inhibitors* because quality operators would stay away from a space or a given block because of its presence. These include the likes of Subway; this type of operator should be located on side streets or secondary streets, not on a district's key shopping/dining blocks.

downtown works

4. Implementation

A. RECOMMENDATIONS

Environment

- **Clean it up!** Consumers, also operators, are attracted to tidy, well-lit, clean places
- Women are especially sensitive to cleanliness, and they still make the majority of spending decisions
- Don't spend time and money marketing the district before cleaning it up. You don't want people coming before it's improved lest they not return.
- Improve the streetscaping with flowers, foliage, new street fixtures. Ensure that street trees don't block storefronts and signage.

TREES MEAN BUSINESS: City Trees and the Retail Streetscape
by Kathleen L. Wolf, Ph.D., University of Washington
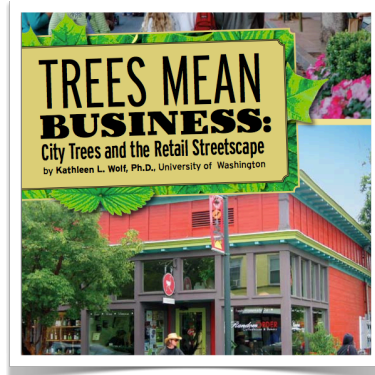
Parking

- Improve way-finding to existing parking lots.
- Ensure new construction adds appropriate parking.

Buildings/Design

Both retailers and consumers are attracted to districts marked by unique, distinctive storefronts that are differentiated from adjacent ones as well as from uses on upper floors. A set of retail-specific design guidelines can aid significantly towards this goal. Additionally, encouraging developers, landlords and prospective operators to engage architects with retail expertise is essential.

- don't over-retail: ground level can be residential, office, live/work, fitness…
- improve existing facades
- ban tinted windows! change out existing, don't allow in new
- encourage developers to:
  - do one-level of retail (even if design looks like two)
  - not use setbacks at ground level, build to column line
  - hire retail-centric architects for ground floors
- require tenants brand storefronts in compliance with retail design guidelines
  - permissible materials (i.e., ban tinted windows and aluminum framing, particularly "strip-mall silver")
  - transparency %
  - blade signs
  - etc…
- have architects do renderings of storefronts for key buildings to enable property owners to visualize their potential. The Bookstore presents a great opportunity for this, either with a local architect or through a contest within the UW School of Architecture.

Leasing

- Recapture spaces from poor quality operators (per the QA).
- Incorporate rules and regulations for design and operations into leases. Require review and approval of design, including storefront, signage, fixtures, furniture, etc.
- Include very specific use clauses, explaining exactly what can be sold. Restaurants leases should include review and approval of menus. Avoid offering exclusives (on product lines, food types).
- Set minimum standard hours of operation and incorporate in each lease. Recommend at least 6 days open, specifying which days, and from the hours of 10am to 6pm. Allow a tenant to stay open outside of those hours (as, for example, many restaurants would). Also, require all tenants keep lights on until at least 11pm.
- Avoid options, or use them very carefully.
  - Options should only be awarded to those who are making improvements that require long-term amortization.
  - In order to exercise an option, lease requirements must be current and there cannot be more than three events of default over the initial term (that must have been cured).
  - Depending on the length of options offered, some form of renovation or store updating must be required.
  - Options are best if they are two-sided and based on a sales threshold.
- Consider annual or bi-annual step-up in rents based on sales performance.
- Even when there is no percentage-rent clause in a lease, require tenants to report gross sales on a monthly basis as it is critical for a landlord to know how each tenant is performing.
- Include a continuous operations clause stating that a business cannot go dark. If a business does go dark for more than 30 days, landlord has the right to terminate lease and take immediate possession of the space, and tenant is still responsible for all monies owed up until termination.
- Consider a radius restriction for the same operation.
- Ensure sublets are at the landlord's sole discretion.

downtown works

Incentives

- Incentives can be useful tools for attracting tenants. These often come from landlords in the form of interior fit-out, low initial rent rates, and tenant allowances.
- It can also be useful to provide incentives in the form of forgivable loans and/or facade improvement grants. Below are example criteria for these types of incentives.

Forgivable Loan Program:

- Strict set of criteria, with a time limit
- Geographically specific (must be for operations opening within the Pike/Pine corridor)
- Must stay in business for 5 years
- Each year, 20% of loan is forgiven
- Large enough to make an impact ($20,000 - $100,000)
- First round pool of funds: $300,000 to $500,000
- Successful in places like St. Louis, MO
  - *Administered through St. Louis Development Corporation*
  - *Guided by small committee that followed Downtown Works' retail recommendations regarding location and retail type*

Façade Grant Program:

- Strict set of criteria
- Need to geographically restrict (to the focus area) in order to have an impact
- Large enough to make an impact ($25k to $40k or more)
- Include matching component—property owner or tenant must make financial commitment
- Successful model in Philadelphia, PA administered through Center City District

Recruiting

The U-District will have the best chance of reaching its full potential if a **retail recruiter** is hired to steward the strategy.

The retail recruiter identifies and develops relationships with compelling operators—ideally not first-timers, but ones that have proven themselves adept at creating a compelling shop or eatery—that appeal to the target market. The recruiter acts as a matchmaker between prospects and U-District property owners and their brokers. Early on, the recruiter meets with landlords to discuss the strategy and begin building their trust. The recruiter must be:

- an expert at recognizing quality store and restaurant operators
- enthusiastic about the U-District
- detail oriented
- tenacious yet engaging

In cases where landlords simply cannot reject a tenant that is not the highest and best use for the district, the recruiter can encourage shorter-term deals and performance clauses that allow the space to be recaptured when more fitting tenants are found. Landlords may not have experience with recapture and relocation strategies, but these are useful tools for improving a retail district.

Retail Recruiter Role

- stewards the retail strategy
- salaried (not commission-based)
- develops and nurtures relationships with property owners, existing operators, and potential operators
- serves as a "Match Maker"—brings viable prospects to landlords and/or their real estate representative
- keeps track of key vacancies, short-term leases, lease expirations; helps recapture ground level space for retail
- keeps track of new developments
- works with relevant city agencies to help facilitate the opening of shops and restaurants

Retail Recruiting Process

The retail recruiter is tasked with finding shop and restaurant operators for the U-District, with a particular emphasis on The Ave from 41st to 50th Streets.

The recruiting effort is time-consuming, ongoing (operators come and go over time, making prospecting for shops and restaurants a continuous process), and personal—prospecting is conducted in person, not by phone or e-mail. Typically, Downtown Works with its clients to select the ideal candidate for a Retail Recruiter position. Following hiring, the training process across six months includes:

- *Initial Training*: Downtown Works provides recruiters with intensive training on leasing terminology; landlord relations; prospecting philosophy, approach, and best practices; and the process for "handholding" a retailer through to the opening of their operation (leasing, permitting, etc.).

- *Prospecting*: We prospect with recruiters, seeking out and engaging unique, independent operators from throughout the region (in the case of the U-District, it would be appropriate to prospect in both Washington and Oregon). We also work with the recruiter to reach out, as appropriate, to national and international operators. We continually review prospecting efforts and strategize regarding key opportunities.

- *Landlord Relations:* Together with the recruiter, we meet one-on-one with landlords and their brokers to share the retail strategy, seeking their support for the plan. We discuss opportunities and issues with their specific properties and tenants, and emphasize how critical the street-level tenanting is to their building as well as to the district as a whole. We know from experience that it can be a challenge to engage and gain support from landlords. This is a time-consuming yet critical part of the implementation, as with their support the program will have the greatest opportunity for success.

B. GETTING STARTED—INITIAL & NEXT STEPS

Initial Steps

- Clean up The Ave!

- Maintain the improvements.

- Hire and provide training for a retail recruiter to serve as the steward for improving the shopping and dining culture in the U-District.

- Develop a marketing image piece for use by the recruiter. This should be eye-catching and succinct; additional information can be made available online.

- Develop database: The recruiter should enter all data regarding prospecting in a tool such as SalesForce for his/her use and to build institutional memory.

Next Steps

- Beautify the district with streetscape improvements.

- Explore the use of incentives.

- Focus on recommendations related to buildings, design, developers, and parking.

- Replace the poorest quality operators as leases expire.

- Fight to keep inhibitors off the Ave!

- Market the district once improvements have been made.

C. MEASURING PROGRAM PROGRESS

The decline of a district does not occur overnight, and similarly it takes time to improve it. Progress when beginning a retail transformation is likely to seem slow, but over time a district can be improved one space at a time with an active and sustained recruitment effort.

early on (years 1-2):

- ▶ # of prospects generated
- ▶ # of prospect visits
- ▶ # of deals in negotiations

later (years 2-5):

- ▶ # of leases signed
- ▶ # of operations opened

over time:

- ▶ increase in rental rates
- ▶ growth in sales tax
- ▶ growth in property tax

Appendix

1. Retail Design

2. What Makes a Great Retailer?

3. Storefront Presence—*Get Customers in the Door!*

4. Trade Area Demographics & Psychographics

    • Primary Trade Area

    • Secondary Trade Area

The importance of corners
- First impression of the street—set the tone via facades, window displays and physical conditions
- Build out to sidewalk (right-of-way)

No arcades, plazas, or special features in storefront area
- Consumers are drawn in by quality merchandise display and good storefront design; arcades and plazas hide these

Avoid generic designs from storefront systems; these lead to a bland environment that does not interest passersby
- New construction, mixed-use buildings are at high risk
- See examples of what to avoid below

Encourage unique, distinctive storefronts
- Storefronts should be differentiated from upper floor uses, and distinct from adjacent ones; operators must express their brand/identity to capture the interest of passersby
- See examples of distinctive storefronts on page 26

Clear sight-lines
- well-branded storefronts/windows are a retailer's best marketing tool
- in a retail environment, median and sidewalk plantings with trees must be maintained so that visibility to storefronts is unhindered
- Tinted windows must be banned—they block the view into a storefront

Generic storefront systems to **AVOID** as they do not capture interest from those passing by on foot or by vehicle, and give retailers little to no opportunity to distinguish their brand.

Example storefronts to **EMULATE**! This small sampling shows distinctive storefronts that help create interest-capturing districts. To achieve this, operators should always hire experts experienced with designing shop and/or restaurant exteriors (and interiors!).

Distinctive storefronts (can be designed in old *and* new buildings):

- Distinguish from upper floors

- Encourage professional, retail-specific designs

- Institute design review guidelines

What makes a great retailer?

What makes a great retailer?

Appropriate Signage

- Succinct (name should be in only 1 or 2 places)

- Eye-catching, attractive graphics; styled to fit character of storefront

- Should not state too much information (i.e. hours, website, number, name, merchandise)

- Avoid neon "open" signs

What makes a great retailer?

Engaging window displays:

- Should change every 2 or 3 weeks (great retailers change more frequently!)

- Convey a particular spirit and are eye-catching

- Don't overly rely on props (rather focus on merchandise sold)

- Are very well-lit

Thoughtful selection and presentation of merchandise:

- Sought-after products organized by color, style, type

- Inventory levels— neither cluttered nor sparse

- Merchandise selection varied yet focused
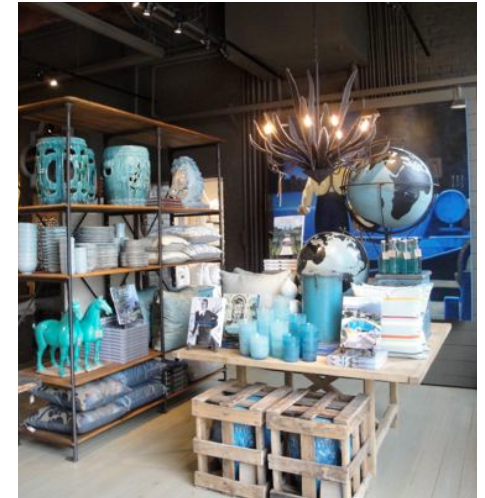
What makes a great retailer?

GET CUSTOMERS IN THE DOOR!

Like a well-wrapped gift, the exterior of a shop or restaurant holds the promise of something special within. **An effective storefront reflects your brand and entices people to enter** (and if you can get more people in your door, your sales will increase!).

When passersby see a storefront, they unconsciously evaluate the shop or restaurant in 3 seconds or less. The business's design, signage, cleanliness, and display must each reflect its' brand promise, communicating the core of what the operation is all about and enabling a person to decide whether or not to enter.

☹ *The exterior of this restaurant in Washington DC does not reflect it's interior; many people who would enjoy it's interior decor will never enter given it's exterior appearance (plasticized signage, door cluttered with decals, filthy windows).*

A 2009 study by the Wharton School of Business found that customer loyalty is more heavily influenced by the "brand experience" than by any other factor; it's critical to ensure your store's brand is as clearly expressed on the <u>outside</u> as it is on the inside!

☺ *The exteriors of these stores in Seattle (two photos at left) and Portland (two at right) convey brand messages consistent with the look/feel and merchandise found within.*

KEY EXTERIOR PRACTICES

Minimal Signage (has far more impact!)

- store name
- succinct listing of hours
- no neon "open" signs
- no credit card stickers
- no hand-written signage

vs.

Clean & Well-maintained

- women are especially sensitive to this, they notice and are repelled by dirt/shabbiness
- keep windows sparkling clean
- sweep debris daily
- wash entry mats (and replace when worn out)
- touch-up paint as needed

Make it *Inviting*

- attractive doormat
- planters with healthy plants
- bench or cafe table/chairs
- be creative....do something unusual or fun that fits your brand!

Painted trash cans, left, become planters that brighten up a storefront in Portland, OR. At right, a store in DC causes even those not accompanied by a pooch to pause and smile! An iron bench, below, invites passersby to sit for a spell at a store in Provincetown, MA.

The store above uses exterior lighting well; the window at right was shot late at night!

Well-lit

- critically important!
- have a combination of directional spots and floods (there are some great little halogen spotlights available that are inexpensive and easy to install) to use in windows; make sure the cords are unobtrusive
- light up the exterior of the building
- adjust light level for time of day, and keep on until at least 10pm, 11 is even better!

Windows

- frequent display changes keep passersby interested (in many cases, the same people walk by daily, so change it up!)
- "don't air your dirty laundry in public" – don't put cash/wrap area up against the window (banks, offices can follow this practice, no cluttered desk areas backed up to the window contributes to a better street)

Simple, eye-catching display.

downtown works
analyze. strategize. realize.
www.dtownworks.com

University District - Primary Trade Area

98115

98103

98105

98195

98102

98112

downtown works

Executive Summary

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

	98115 (SEATTLE, WA), 9810...
Population	
2000 Population	164,689
2010 Population	178,298
2013 Population	183,667
2018 Population	195,017
2000-2010 Annual Rate	0.80%
2010-2013 Annual Rate	0.92%
2013-2018 Annual Rate	1.21%
2013 Male Population	50.0%
2013 Female Population	50.0%
2013 Median Age	33.4

In the identified area, the current year population is 183,667. In 2010, the Census count in the area was 178,298. The rate of change since 2010 was 0.92% annually. The five-year projection for the population in the area is 195,017 representing a change of 1.21% annually from 2013 to 2018. Currently, the population is 50.0% male and 50.0% female.

Median Age	

The median age in this area is 33.4, compared to U.S. median age of 37.3.

Race and Ethnicity	
2013 White Alone	78.8%
2013 Black Alone	2.7%
2013 American Indian/Alaska Native Alone	0.5%
2013 Asian Alone	11.1%
2013 Pacific Islander Alone	0.2%
2013 Other Race	1.5%
2013 Two or More Races	5.3%
2013 Hispanic Origin (Any Race)	5.4%

Persons of Hispanic origin represent 5.4% of the population in the identified area compared to 17.4% of the U.S. population. Persons of Hispanic Origin may be of any race. The Diversity Index, which measures the probability that two people from the same area will be from different race/ethnic groups, is 43.1 in the identified area, compared to 62.1 for the U.S. as a whole.

Households	
2000 Households	77,969
2010 Households	82,501
2013 Total Households	84,826
2018 Total Households	90,333
2000-2010 Annual Rate	0.57%
2010-2013 Annual Rate	0.86%
2013-2018 Annual Rate	1.27%
2013 Average Household Size	2.03

The household count in this area has changed from 82,501 in 2010 to 84,826 in the current year, a change of 0.86% annually. The five-year projection of households is 90,333, a change of 1.27% annually from the current year total. Average household size is currently 2.03, compared to 2.03 in the year 2010. The number of families in the current year is 33,709 in the specified area.

October 29, 2013

Executive Summary

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

	98115 (SEATTLE, WA), 9810...
Median Household Income	
2013 Median Household Income	$62,775
2018 Median Household Income	$78,855
2013-2018 Annual Rate	4.67%
Average Household Income	
2013 Average Household Income	$94,036
2018 Average Household Income	$115,853
2013-2018 Annual Rate	4.26%
Per Capita Income	
2013 Per Capita Income	$44,632
2018 Per Capita Income	$54,795
2013-2018 Annual Rate	4.19%
Households by Income	

Current median household income is $62,775 in the area, compared to $51,314 for all U.S. households. Median household income is projected to be $78,855 in five years, compared to $59,580 for all U.S. households

Current average household income is $94,036 in this area, compared to $71,842 for all U.S households. Average household income is projected to be $115,853 in five years, compared to $83,667 for all U.S. households

Current per capita income is $44,632 in the area, compared to the U.S. per capita income of $27,567. The per capita income is projected to be $54,795 in five years, compared to $32,073 for all U.S. households

Housing	
2000 Total Housing Units	80,726
2000 Owner Occupied Housing Units	36,515
2000 Owner Occupied Housing Units	41,454
2000 Vacant Housing Units	2,757
2010 Total Housing Units	88,317
2010 Owner Occupied Housing Units	39,151
2010 Renter Occupied Housing Units	43,350
2010 Vacant Housing Units	5,816
2013 Total Housing Units	90,556
2013 Owner Occupied Housing Units	39,257
2013 Renter Occupied Housing Units	45,569
2013 Vacant Housing Units	5,730
2018 Total Housing Units	95,780
2018 Owner Occupied Housing Units	41,779
2018 Renter Occupied Housing Units	48,554
2018 Vacant Housing Units	5,447

Currently, 43.4% of the 90,556 housing units in the area are owner occupied; 50.3%, renter occupied; and 6.3% are vacant. Currently, in the U.S., 56.4% of the housing units in the area are owner occupied; 32.3% are renter occupied; and 11.3% are vacant. In 2010, there were 88,317 housing units in the area - 44.3% owner occupied, 49.1% renter occupied, and 6.6% vacant. The annual rate of change in housing units since 2010 is 1.12%. Median home value in the area is $478,273, compared to a median home value of $177,257 for the U.S. In five years, median value is projected to change by 3.74% annually to $574,714.

October 29, 2013

Market Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

	98115 (SEATTLE, WA), 9810...
Population Summary	
2000 Total Population	164,689
2010 Total Population	178,298
2013 Total Population	183,667
2013 Group Quarters	11,076
2018 Total Population	195,017
2013-2018 Annual Rate	1.21%
Household Summary	
2000 Households	77,969
2000 Average Household Size	2.00
2010 Households	82,501
2010 Average Household Size	2.03
2013 Households	84,826
2013 Average Household Size	2.03
2018 Households	90,333
2018 Average Household Size	2.04
2013-2018 Annual Rate	1.27%
2010 Families	32,886
2010 Average Family Size	2.75
2013 Families	33,709
2013 Average Family Size	2.74
2018 Families	35,622
2018 Average Family Size	2.73
2013-2018 Annual Rate	1.11%
Housing Unit Summary	
2000 Housing Units	80,726
Owner Occupied Housing Units	45.2%
Renter Occupied Housing Units	51.4%
Vacant Housing Units	3.4%
2010 Housing Units	88,317
Owner Occupied Housing Units	44.3%
Renter Occupied Housing Units	49.1%
Vacant Housing Units	6.6%
2013 Housing Units	90,556
Owner Occupied Housing Units	43.4%
Renter Occupied Housing Units	50.3%
Vacant Housing Units	6.3%
2018 Housing Units	95,780
Owner Occupied Housing Units	43.6%
Renter Occupied Housing Units	50.7%
Vacant Housing Units	5.7%
Median Household Income	
2013	$62,775
2018	$78,855
Median Home Value	
2013	$478,273
2018	$574,714
Per Capita Income	
2013	$44,632
2018	$54,795
Median Age	
2010	32.8
2013	33.4
2018	34.3

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

October 29, 2013

Market Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

	98115 (SEATTLE, WA), 9810...
2013 Households by Income	
Household Income Base	84,824
<$15,000	10.9%
$15,000 - $24,999	7.2%
$25,000 - $34,999	9.4%
$35,000 - $49,999	12.9%
$50,000 - $74,999	16.1%
$75,000 - $99,999	11.6%
$100,000 - $149,999	16.2%
$150,000 - $199,999	7.1%
$200,000+	8.6%
Average Household Income	$94,036
2018 Households by Income	
Household Income Base	90,331
<$15,000	10.0%
$15,000 - $24,999	5.4%
$25,000 - $34,999	7.6%
$35,000 - $49,999	10.6%
$50,000 - $74,999	13.6%
$75,000 - $99,999	14.3%
$100,000 - $149,999	19.5%
$150,000 - $199,999	9.2%
$200,000+	9.8%
Average Household Income	$115,853
2013 Owner Occupied Housing Units by Value	
Total	39,257
<$50,000	0.1%
$50,000 - $99,999	0.5%
$100,000 - $149,999	1.4%
$150,000 - $199,999	3.1%
$200,000 - $249,999	4.4%
$250,000 - $299,999	5.1%
$300,000 - $399,999	17.7%
$400,000 - $499,999	22.6%
$500,000 - $749,999	27.7%
$750,000 - $999,999	8.6%
$1,000,000 +	8.9%
Average Home Value	$553,891
2018 Owner Occupied Housing Units by Value	
Total	41,779
<$50,000	0.0%
$50,000 - $99,999	0.1%
$100,000 - $149,999	0.3%
$150,000 - $199,999	0.9%
$200,000 - $249,999	1.6%
$250,000 - $299,999	2.5%
$300,000 - $399,999	13.5%
$400,000 - $499,999	20.7%
$500,000 - $749,999	34.8%
$750,000 - $999,999	15.1%
$1,000,000 +	10.5%
Average Home Value	$633,856

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

October 29, 2013

Market Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

	98115 (SEATTLE, WA), 9810...
2010 Population by Age	
Total	178,298
0 - 4	4.8%
5 - 9	3.9%
10 - 14	3.1%
15 - 24	19.8%
25 - 34	22.8%
35 - 44	15.4%
45 - 54	11.3%
55 - 64	10.5%
65 - 74	4.5%
75 - 84	2.5%
85 +	1.5%
18 +	86.5%
2013 Population by Age	
Total	183,667
0 - 4	4.5%
5 - 9	4.1%
10 - 14	3.5%
15 - 24	18.9%
25 - 34	22.4%
35 - 44	15.1%
45 - 54	11.5%
55 - 64	10.6%
65 - 74	5.6%
75 - 84	2.4%
85 +	1.5%
18 +	86.0%
2018 Population by Age	
Total	195,017
0 - 4	4.4%
5 - 9	4.0%
10 - 14	3.8%
15 - 24	18.1%
25 - 34	21.0%
35 - 44	15.0%
45 - 54	11.5%
55 - 64	10.7%
65 - 74	7.1%
75 - 84	2.8%
85 +	1.5%
18 +	85.7%
2010 Population by Sex	
Males	88,955
Females	89,343
2013 Population by Sex	
Males	91,785
Females	91,882
2018 Population by Sex	
Males	97,769
Females	97,248

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University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

	98115 (SEATTLE, WA), 9810...
2010 Population by Race/Ethnicity	
Total	178,298
White Alone	79.7%
Black Alone	2.7%
American Indian Alone	0.5%
Asian Alone	10.7%
Pacific Islander Alone	0.2%
Some Other Race Alone	1.3%
Two or More Races	5.0%
Hispanic Origin	4.7%
Diversity Index	41.0
2013 Population by Race/Ethnicity	
Total	183,667
White Alone	78.8%
Black Alone	2.7%
American Indian Alone	0.5%
Asian Alone	11.1%
Pacific Islander Alone	0.2%
Some Other Race Alone	1.5%
Two or More Races	5.3%
Hispanic Origin	5.4%
Diversity Index	43.1
2018 Population by Race/Ethnicity	
Total	195,017
White Alone	76.9%
Black Alone	2.9%
American Indian Alone	0.5%
Asian Alone	11.9%
Pacific Islander Alone	0.2%
Some Other Race Alone	1.8%
Two or More Races	5.8%
Hispanic Origin	6.6%
Diversity Index	46.8
2010 Population by Relationship and Household Type	
Total	178,297
In Households	94.1%
In Family Households	52.5%
Householder	18.4%
Spouse	15.0%
Child	15.7%
Other relative	1.7%
Nonrelative	1.7%
In Nonfamily Households	41.6%
In Group Quarters	5.9%
Institutionalized Population	0.2%
Noninstitutionalized Population	5.7%

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University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
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	98115 (SEATTLE, WA), 9810...
2013 Population 25+ by Educational Attainment	
Total	126,751
Less than 9th Grade	0.8%
9th - 12th Grade, No Diploma	1.6%
High School Graduate	7.2%
Some College, No Degree	13.6%
Associate Degree	5.7%
Bachelor's Degree	39.6%
Graduate/Professional Degree	31.4%
2013 Population 15+ by Marital Status	
Total	161,533
Never Married	51.1%
Married	37.2%
Widowed	2.9%
Divorced	8.8%
2013 Civilian Population 16+ in Labor Force	
Civilian Employed	94.9%
Civilian Unemployed	5.1%
2013 Employed Population 16+ by Industry	
Total	109,068
Agriculture/Mining	0.2%
Construction	3.0%
Manufacturing	5.5%
Wholesale Trade	1.6%
Retail Trade	10.2%
Transportation/Utilities	2.1%
Information	3.0%
Finance/Insurance/Real Estate	5.9%
Services	65.4%
Public Administration	3.1%
2013 Employed Population 16+ by Occupation	
Total	109,068
White Collar	79.2%
Management/Business/Financial	19.5%
Professional	40.7%
Sales	9.9%
Administrative Support	9.1%
Services	14.4%
Blue Collar	6.3%
Farming/Forestry/Fishing	0.0%
Construction/Extraction	1.8%
Installation/Maintenance/Repair	1.0%
Production	1.7%
Transportation/Material Moving	1.8%

October 29, 2013

Market Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

	98115 (SEATTLE, WA), 9810...
2010 Households by Type	
Total	82,500
Households with 1 Person	40.2%
Households with 2+ People	59.8%
Family Households	39.9%
Husband-wife Families	32.5%
With Related Children	13.8%
Other Family (No Spouse Present)	7.4%
Other Family with Male Householder	2.3%
With Related Children	1.0%
Other Family with Female Householder	5.1%
With Related Children	2.7%
Nonfamily Households	19.9%
All Households with Children	17.7%
Multigenerational Households	0.7%
Unmarried Partner Households	10.1%
Male-female	7.8%
Same-sex	2.3%
2010 Households by Size	
Total	82,500
1 Person Household	40.2%
2 Person Household	34.6%
3 Person Household	12.4%
4 Person Household	9.0%
5 Person Household	2.6%
6 Person Household	0.8%
7 + Person Household	0.5%
2010 Households by Tenure and Mortgage Status	
Total	82,501
Owner Occupied	47.5%
Owned with a Mortgage/Loan	35.7%
Owned Free and Clear	11.7%
Renter Occupied	52.5%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

October 29, 2013

Market Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

		98115 (SEATTLE, WA), 9810...
Top 3 Tapestry Segments		
	1.	Metro Renters
	2.	Urban Chic
	3.	Trendsetters
2013 Consumer Spending		
Apparel & Services: Total $		$181,778,636
Average Spent		$2,142.96
Spending Potential Index		95
Computers & Accessories: Total $		$30,847,544
Average Spent		$363.66
Spending Potential Index		146
Education: Total $		$203,640,462
Average Spent		$2,400.68
Spending Potential Index		164
Entertainment/Recreation: Total $		$364,719,495
Average Spent		$4,299.62
Spending Potential Index		132
Food at Home: Total $		$551,744,318
Average Spent		$6,504.42
Spending Potential Index		129
Food Away from Home: Total $		$380,620,872
Average Spent		$4,487.08
Spending Potential Index		140
Health Care: Total $		$431,910,206
Average Spent		$5,091.72
Spending Potential Index		114
HH Furnishings & Equipment: Total $		$178,896,100
Average Spent		$2,108.98
Spending Potential Index		117
Investments: Total $		$307,703,967
Average Spent		$3,627.47
Spending Potential Index		175
Retail Goods: Total $		$2,477,343,833
Average Spent		$29,205.01
Spending Potential Index		121
Shelter: Total $		$1,968,444,369
Average Spent		$23,205.67
Spending Potential Index		143
TV/Video/Audio:Total $		$140,996,113
Average Spent		$1,662.18
Spending Potential Index		129
Travel: Total $		$209,312,942
Average Spent		$2,467.56
Spending Potential Index		135
Vehicle Maintenance & Repairs: Total $		$119,688,070
Average Spent		$1,410.98
Spending Potential Index		129

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.
Source: Consumer Spending data are derived from the 2010 and 2011 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

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University District - Primary Trade Area
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Geographies: 6 ZIP Codes

Summary	Census 2010	2013	2018	2013-2018 Change	2013-2018 Annual Rate
Population	178,298	183,667	195,017	11,350	1.21%
Households	82,501	84,826	90,333	5,507	1.27%
Average Household Size	2.03	2.03	2.04	0.01	0.10%

	Census 2010		2013		2018	
Total Population by Detailed Age	Number	Percent	Number	Percent	Number	Percent
Total	178,299	100.0%	183,667	100.0%	195,017	100.0%
<1	1,848	1.0%	1,777	1.0%	1,845	0.9%
1	1,779	1.0%	1,720	0.9%	1,793	0.9%
2	1,702	1.0%	1,646	0.9%	1,701	0.9%
3	1,603	0.9%	1,609	0.9%	1,657	0.8%
4	1,569	0.9%	1,561	0.8%	1,624	0.8%
5	1,505	0.8%	1,589	0.9%	1,655	0.8%
6	1,472	0.8%	1,567	0.9%	1,632	0.8%
7	1,413	0.8%	1,511	0.8%	1,578	0.8%
8	1,261	0.7%	1,428	0.8%	1,498	0.8%
9	1,245	0.7%	1,360	0.7%	1,459	0.7%
10	1,193	0.7%	1,327	0.7%	1,528	0.8%
11	1,132	0.6%	1,316	0.7%	1,525	0.8%
12	1,044	0.6%	1,242	0.7%	1,437	0.7%
13	1,056	0.6%	1,256	0.7%	1,468	0.8%
14	1,074	0.6%	1,225	0.7%	1,424	0.7%
15	989	0.6%	1,186	0.6%	1,352	0.7%
16	1,033	0.6%	1,149	0.6%	1,317	0.7%
17	1,100	0.6%	1,200	0.7%	1,377	0.7%
18	2,895	1.6%	3,059	1.7%	3,201	1.6%
19	5,176	2.9%	5,213	2.8%	5,329	2.7%
20 - 24	24,116	13.5%	22,975	12.5%	22,682	11.6%
25 - 29	22,798	12.8%	21,691	11.8%	21,335	10.9%
30 - 34	17,807	10.0%	19,367	10.5%	19,703	10.1%
35 - 39	14,804	8.3%	14,498	7.9%	16,345	8.4%
40 - 44	12,626	7.1%	13,183	7.2%	12,915	6.6%
45 - 49	10,287	5.8%	10,967	6.0%	11,928	6.1%
50 - 54	9,783	5.5%	10,083	5.5%	10,583	5.4%
55 - 59	10,152	5.7%	10,166	5.5%	10,734	5.5%
60 - 64	8,608	4.8%	9,387	5.1%	10,104	5.2%
65 - 69	5,145	2.9%	6,435	3.5%	8,370	4.3%
70 - 74	2,916	1.6%	3,767	2.1%	5,546	2.8%
75 - 79	2,374	1.3%	2,473	1.3%	3,356	1.7%
80 - 84	2,109	1.2%	1,997	1.1%	2,120	1.1%
85+	2,685	1.5%	2,737	1.5%	2,896	1.5%
<18	24,021	13.5%	25,669	14.0%	27,870	14.3%
18+	154,280	86.5%	157,998	86.0%	167,147	85.7%
21+	140,977	79.1%	144,264	78.5%	153,176	78.5%
Median Age	32.8		33.4		34.3	

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98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes
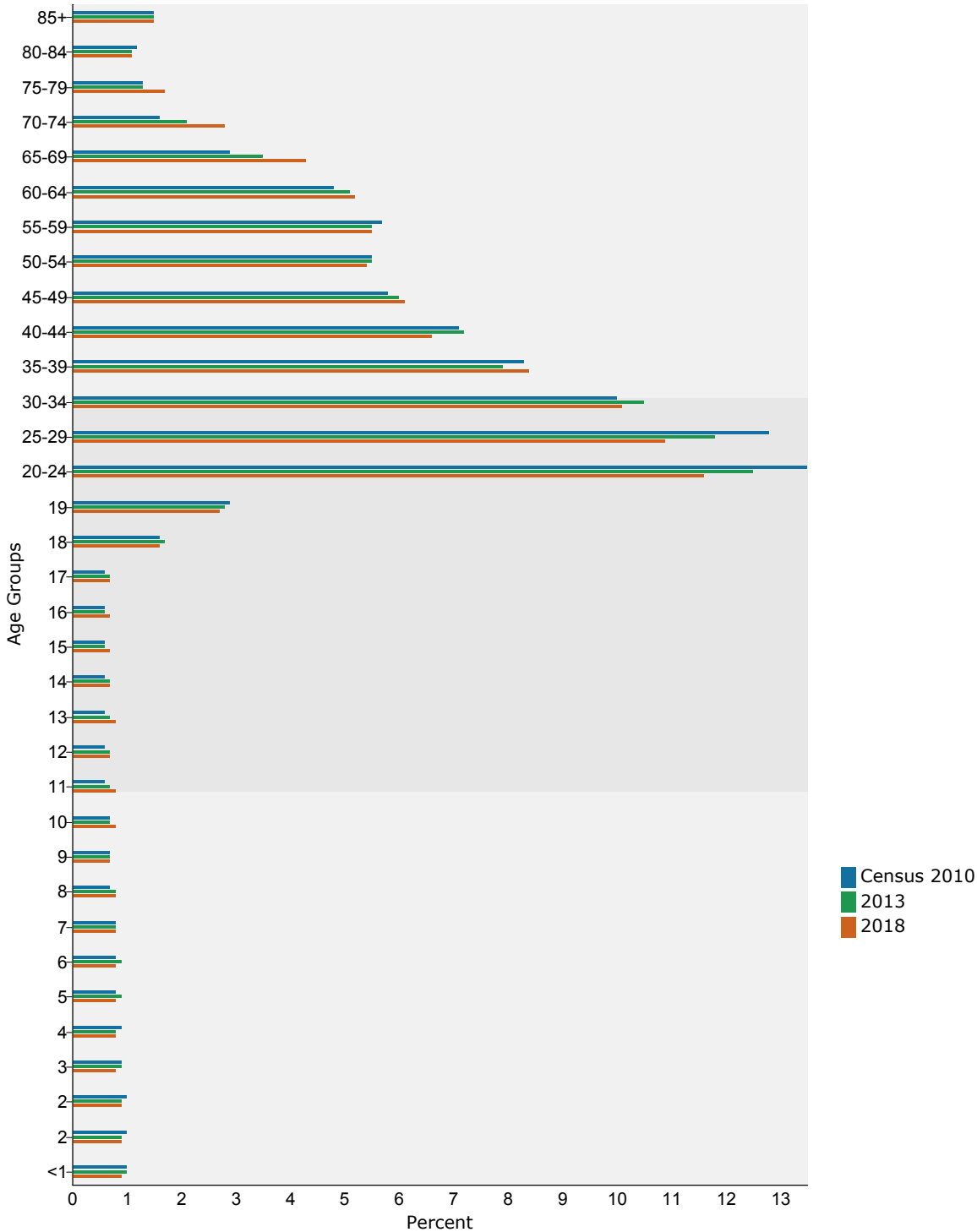
Total Population by Detailed Age

Census 2010
2013
2018

Detailed Age Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Male Population by Detailed Age	Census 2010 Number	Census 2010 Percent	2013 Number	2013 Percent	2018 Number	2018 Percent
Total	88,951	100.0%	91,785	100.0%	97,769	100.0%
<1	916	1.0%	902	1.0%	941	1.0%
1	922	1.0%	887	1.0%	927	0.9%
2	852	1.0%	831	0.9%	859	0.9%
3	828	0.9%	821	0.9%	840	0.9%
4	808	0.9%	792	0.9%	831	0.8%
5	761	0.9%	793	0.9%	826	0.8%
6	740	0.8%	791	0.9%	829	0.8%
7	704	0.8%	746	0.8%	782	0.8%
8	600	0.7%	707	0.8%	746	0.8%
9	616	0.7%	687	0.7%	735	0.8%
10	584	0.7%	660	0.7%	767	0.8%
11	569	0.6%	667	0.7%	772	0.8%
12	530	0.6%	631	0.7%	732	0.7%
13	526	0.6%	634	0.7%	754	0.8%
14	519	0.6%	583	0.6%	683	0.7%
15	507	0.6%	606	0.7%	686	0.7%
16	514	0.6%	566	0.6%	651	0.7%
17	530	0.6%	590	0.6%	678	0.7%
18	1,329	1.5%	1,367	1.5%	1,447	1.5%
19	2,380	2.7%	2,416	2.6%	2,468	2.5%
20 - 24	11,955	13.4%	11,439	12.5%	11,210	11.5%
25 - 29	11,443	12.9%	10,889	11.9%	10,778	11.0%
30 - 34	9,250	10.4%	10,053	11.0%	10,374	10.6%
35 - 39	7,753	8.7%	7,550	8.2%	8,561	8.8%
40 - 44	6,733	7.6%	6,944	7.6%	6,761	6.9%
45 - 49	5,464	6.1%	5,810	6.3%	6,251	6.4%
50 - 54	4,885	5.5%	5,173	5.6%	5,477	5.6%
55 - 59	4,999	5.6%	5,049	5.5%	5,459	5.6%
60 - 64	4,203	4.7%	4,521	4.9%	4,888	5.0%
65 - 69	2,475	2.8%	3,082	3.4%	3,969	4.1%
70 - 74	1,346	1.5%	1,772	1.9%	2,654	2.7%
75 - 79	1,043	1.2%	1,116	1.2%	1,543	1.6%
80 - 84	808	0.9%	805	0.9%	895	0.9%
85+	859	1.0%	905	1.0%	995	1.0%
<18	12,029	13.5%	12,894	14.0%	14,039	14.4%
18+	76,925	86.5%	78,891	86.0%	83,730	85.6%
21+	70,689	79.5%	72,458	78.9%	77,183	78.9%
Median Age	32.9		33.4		34.3	

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Male Population by Detailed Age

Legend:
- Census 2010
- 2013
- 2018

(Y-axis: Age Groups, X-axis: Percent)

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downtown works
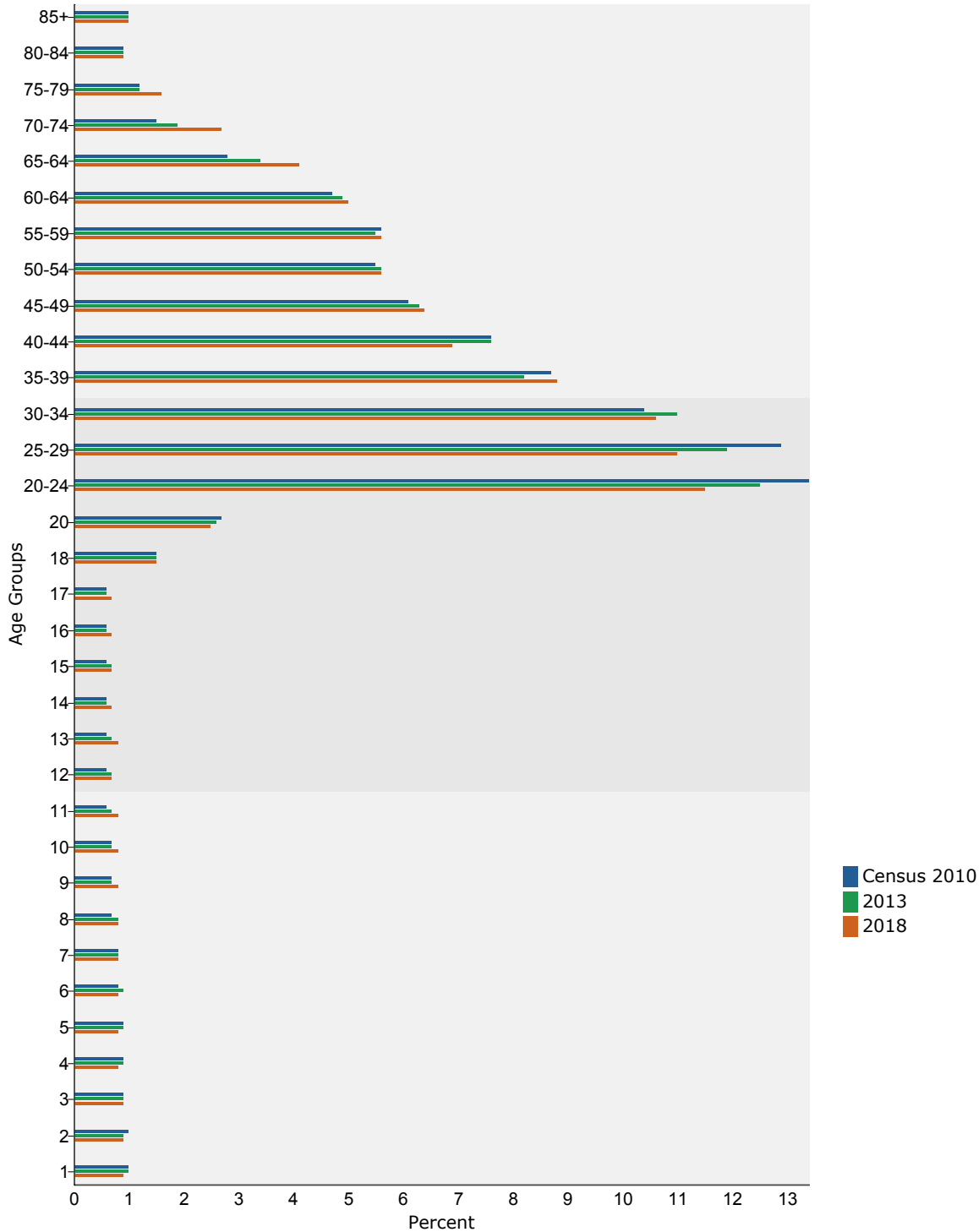
Detailed Age Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Female Population by Detailed Age	Census 2010		2013		2018	
	Number	Percent	Number	Percent	Number	Percent
Total	89,348	100.0%	91,882	100.0%	97,248	100.0%
<1	932	1.0%	875	1.0%	904	0.9%
1	857	1.0%	833	0.9%	866	0.9%
2	850	1.0%	815	0.9%	842	0.9%
3	775	0.9%	788	0.9%	817	0.8%
4	761	0.9%	769	0.8%	793	0.8%
5	744	0.8%	796	0.9%	829	0.9%
6	732	0.8%	776	0.8%	803	0.8%
7	709	0.8%	765	0.8%	796	0.8%
8	661	0.7%	721	0.8%	752	0.8%
9	629	0.7%	673	0.7%	724	0.7%
10	609	0.7%	667	0.7%	761	0.8%
11	563	0.6%	649	0.7%	753	0.8%
12	514	0.6%	611	0.7%	705	0.7%
13	530	0.6%	622	0.7%	714	0.7%
14	555	0.6%	642	0.7%	741	0.8%
15	482	0.5%	580	0.6%	666	0.7%
16	519	0.6%	583	0.6%	666	0.7%
17	570	0.6%	610	0.7%	699	0.7%
18	1,566	1.8%	1,692	1.8%	1,754	1.8%
19	2,796	3.1%	2,797	3.0%	2,861	2.9%
20 - 24	12,161	13.6%	11,536	12.6%	11,472	11.8%
25 - 29	11,355	12.7%	10,802	11.8%	10,557	10.9%
30 - 34	8,557	9.6%	9,314	10.1%	9,329	9.6%
35 - 39	7,051	7.9%	6,948	7.6%	7,784	8.0%
40 - 44	5,893	6.6%	6,239	6.8%	6,154	6.3%
45 - 49	4,823	5.4%	5,157	5.6%	5,677	5.8%
50 - 54	4,898	5.5%	4,910	5.3%	5,106	5.3%
55 - 59	5,153	5.8%	5,117	5.6%	5,275	5.4%
60 - 64	4,405	4.9%	4,866	5.3%	5,216	5.4%
65 - 69	2,670	3.0%	3,353	3.6%	4,401	4.5%
70 - 74	1,570	1.8%	1,995	2.2%	2,892	3.0%
75 - 79	1,331	1.5%	1,357	1.5%	1,813	1.9%
80 - 84	1,301	1.5%	1,192	1.3%	1,225	1.3%
85+	1,826	2.0%	1,832	2.0%	1,901	2.0%
<18	11,992	13.4%	12,775	13.9%	13,831	14.2%
18+	77,356	86.6%	79,107	86.1%	83,417	85.8%
21+	70,288	78.7%	71,806	78.2%	75,993	78.1%
Median Age	32.8		33.4		34.4	

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018.

October 29, 2013

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University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Female Population by Detailed Age

October 29, 2013
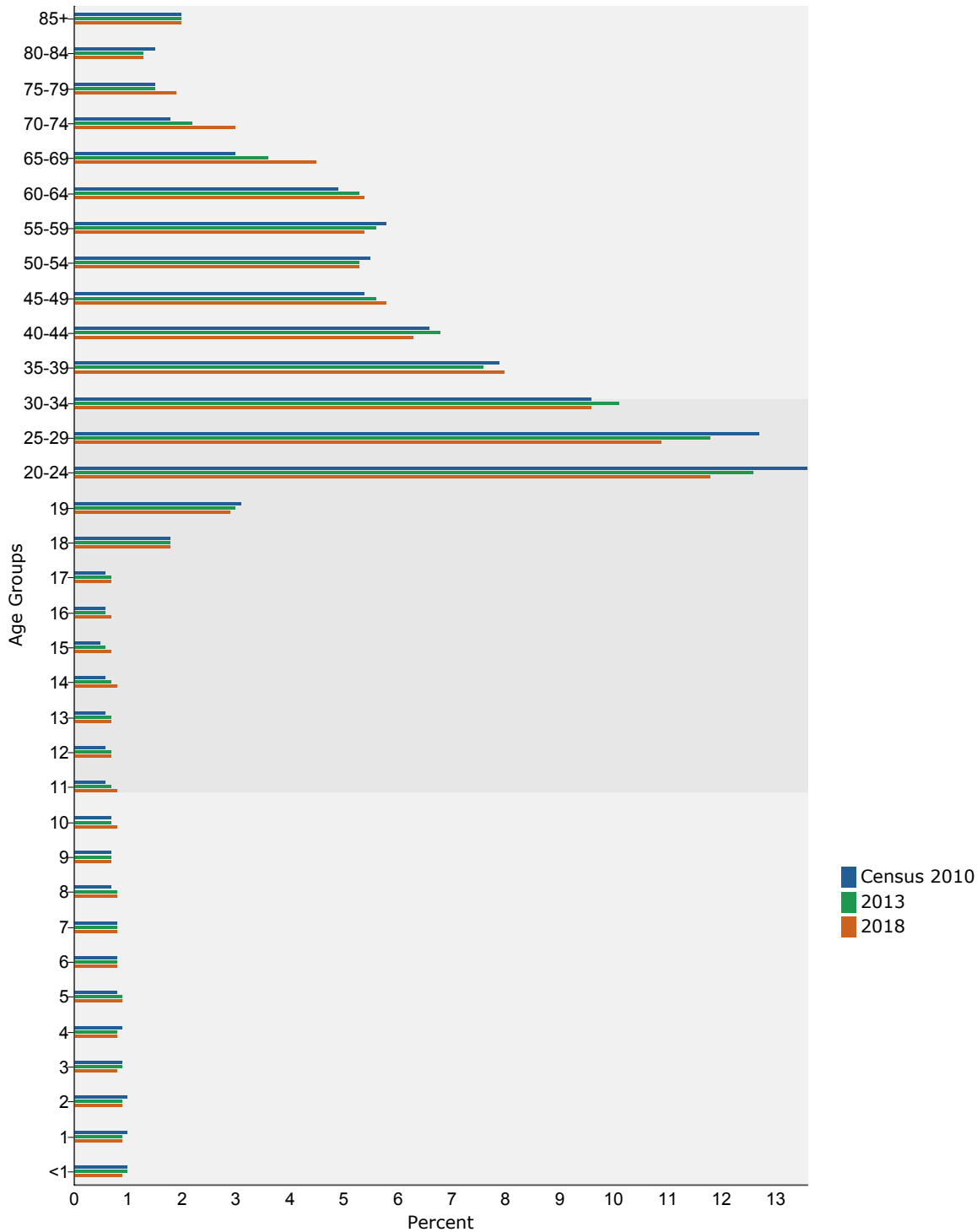
Data for all businesses in area	98195 (UNIV OF WASHINGTON...
Total Businesses:	61
Total Employees:	3,095
Total Residential Population:	2,966
Employee/Residential Population Ratio:	1.04

	Businesses		Employees	
by SIC Codes	Number	Percent	Number	Percent
Agriculture & Mining	0	0.0%	0	0.0%
Construction	0	0.0%	0	0.0%
Manufacturing	3	4.9%	206	6.7%
Transportation	0	0.0%	0	0.0%
Communication	0	0.0%	0	0.0%
Utility	0	0.0%	0	0.0%
Wholesale Trade	1	1.6%	6	0.2%
Retail Trade Summary	2	3.3%	5	0.2%
Home Improvement	0	0.0%	0	0.0%
General Merchandise Stores	0	0.0%	0	0.0%
Food Stores	0	0.0%	0	0.0%
Auto Dealers, Gas Stations, Auto Aftermarket	0	0.0%	0	0.0%
Apparel & Accessory Stores	0	0.0%	0	0.0%
Furniture & Home Furnishings	0	0.0%	0	0.0%
Eating & Drinking Places	0	0.0%	0	0.0%
Miscellaneous Retail	2	3.3%	5	0.2%
Finance, Insurance, Real Estate Summary	0	0.0%	0	0.0%
Banks, Savings & Lending Institutions	0	0.0%	0	0.0%
Securities Brokers	0	0.0%	0	0.0%
Insurance Carriers & Agents	0	0.0%	0	0.0%
Real Estate, Holding, Other Investment Offices	0	0.0%	0	0.0%
Services Summary	55	90.2%	2,878	93.0%
Hotels & Lodging	0	0.0%	0	0.0%
Automotive Services	0	0.0%	0	0.0%
Motion Pictures & Amusements	0	0.0%	0	0.0%
Health Services	20	32.8%	186	6.0%
Legal Services	0	0.0%	0	0.0%
Education Institutions & Libraries	14	23.0%	2,093	67.6%
Other Services	21	34.4%	599	19.4%
Government	0	0.0%	0	0.0%
Totals	61	100%	3,095	100%

November 04, 2013

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	0	0.0%	0	0.0%
Mining	0	0.0%	0	0.0%
Utilities	0	0.0%	0	0.0%
Construction	0	0.0%	0	0.0%
Manufacturing	2	3.3%	203	6.6%
Wholesale Trade	1	1.6%	6	0.2%
Retail Trade	2	3.3%	5	0.2%
Motor Vehicle & Parts Dealers	0	0.0%	0	0.0%
Furniture & Home Furnishings Stores	0	0.0%	0	0.0%
Electronics & Appliance Stores	0	0.0%	0	0.0%
Bldg Material & Garden Equipment & Supplies Dealers	0	0.0%	0	0.0%
Food & Beverage Stores	0	0.0%	0	0.0%
Health & Personal Care Stores	0	0.0%	0	0.0%
Gasoline Stations	0	0.0%	0	0.0%
Clothing & Clothing Accessories Stores	0	0.0%	0	0.0%
Sport Goods, Hobby, Book, & Music Stores	1	1.6%	2	0.1%
General Merchandise Stores	0	0.0%	0	0.0%
Miscellaneous Store Retailers	1	1.6%	3	0.1%
Nonstore Retailers	0	0.0%	0	0.0%
Transportation & Warehousing	0	0.0%	0	0.0%
Information	3	4.9%	45	1.5%
Finance & Insurance	0	0.0%	0	0.0%
Central Bank/Credit Intermediation & Related Activities	0	0.0%	0	0.0%
Securities, Commodity Contracts & Other Financial Investments & Other Related Activities	0	0.0%	0	0.0%
Insurance Carriers & Related Activities; Funds, Trusts & Other Financial Vehicles	0	0.0%	0	0.0%
Real Estate, Rental & Leasing	0	0.0%	0	0.0%
Professional, Scientific & Tech Services	8	13.1%	505	16.3%
Legal Services	0	0.0%	0	0.0%
Management of Companies & Enterprises	0	0.0%	0	0.0%
Administrative & Support & Waste Management & Remediation Services	2	3.3%	2	0.1%
Educational Services	12	19.7%	2,051	66.3%
Health Care & Social Assistance	23	37.7%	266	8.6%
Arts, Entertainment & Recreation	0	0.0%	0	0.0%
Accommodation & Food Services	0	0.0%	0	0.0%
Accommodation	0	0.0%	0	0.0%
Food Services & Drinking Places	0	0.0%	0	0.0%
Other Services (except Public Administration)	8	13.1%	12	0.4%
Automotive Repair & Maintenance	0	0.0%	0	0.0%
Public Administration	0	0.0%	0	0.0%
Total	61	100%	3,095	100%

November 04, 2013

Data for all businesses in area	98105 (SEATTLE, WA)
Total Businesses:	2,642
Total Employees:	16,693
Total Residential Population:	40,783
Employee/Residential Population Ratio:	0.41

	Businesses		Employees	
by SIC Codes	Number	Percent	Number	Percent
Agriculture & Mining	51	1.9%	139	0.8%
Construction	108	4.1%	326	2.0%
Manufacturing	84	3.2%	854	5.1%
Transportation	22	0.8%	143	0.9%
Communication	23	0.9%	230	1.4%
Utility	3	0.1%	11	0.1%
Wholesale Trade	70	2.6%	248	1.5%
Retail Trade Summary	489	18.5%	4,011	24.0%
Home Improvement	11	0.4%	95	0.6%
General Merchandise Stores	6	0.2%	29	0.2%
Food Stores	41	1.6%	581	3.5%
Auto Dealers, Gas Stations, Auto Aftermarket	18	0.7%	271	1.6%
Apparel & Accessory Stores	35	1.3%	343	2.1%
Furniture & Home Furnishings	47	1.8%	301	1.8%
Eating & Drinking Places	193	7.3%	1,388	8.3%
Miscellaneous Retail	138	5.2%	1,003	6.0%
Finance, Insurance, Real Estate Summary	205	7.8%	773	4.6%
Banks, Savings & Lending Institutions	23	0.9%	181	1.1%
Securities Brokers	8	0.3%	15	0.1%
Insurance Carriers & Agents	25	0.9%	75	0.4%
Real Estate, Holding, Other Investment Offices	149	5.6%	502	3.0%
Services Summary	1,574	59.6%	9,823	58.8%
Hotels & Lodging	26	1.0%	376	2.3%
Automotive Services	22	0.8%	128	0.8%
Motion Pictures & Amusements	72	2.7%	292	1.7%
Health Services	231	8.7%	3,103	18.6%
Legal Services	47	1.8%	109	0.7%
Education Institutions & Libraries	83	3.1%	1,875	11.2%
Other Services	1,093	41.4%	3,940	23.6%
Government	13	0.5%	135	0.8%
Totals	2,642	100%	16,693	100%

Source: Copyright 2013 Dun & Bradstreet, Inc. All rights reserved. Esri Total Residential Population forecasts for 2013.

November 04, 2013

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Page 1 of 2

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	12	0.5%	22	0.1%
Mining	1	0.0%	1	0.0%
Utilities	1	0.0%	3	0.0%
Construction	111	4.2%	335	2.0%
Manufacturing	63	2.4%	825	4.9%
Wholesale Trade	69	2.6%	246	1.5%
Retail Trade	294	11.1%	2,619	15.7%
Motor Vehicle & Parts Dealers	11	0.4%	233	1.4%
Furniture & Home Furnishings Stores	14	0.5%	135	0.8%
Electronics & Appliance Stores	29	1.1%	144	0.9%
Bldg Material & Garden Equipment & Supplies Dealers	11	0.4%	95	0.6%
Food & Beverage Stores	39	1.5%	572	3.4%
Health & Personal Care Stores	22	0.8%	178	1.1%
Gasoline Stations	7	0.3%	38	0.2%
Clothing & Clothing Accessories Stores	40	1.5%	394	2.4%
Sport Goods, Hobby, Book, & Music Stores	40	1.5%	441	2.6%
General Merchandise Stores	6	0.2%	29	0.2%
Miscellaneous Store Retailers	63	2.4%	264	1.6%
Nonstore Retailers	12	0.5%	96	0.6%
Transportation & Warehousing	15	0.6%	120	0.7%
Information	89	3.4%	432	2.6%
Finance & Insurance	76	2.9%	313	1.9%
Central Bank/Credit Intermediation & Related Activities	22	0.8%	172	1.0%
Securities, Commodity Contracts & Other Financial Investments & Other Related Activities	23	0.9%	53	0.3%
Insurance Carriers & Related Activities; Funds, Trusts & Other Financial Vehicles	31	1.2%	88	0.5%
Real Estate, Rental & Leasing	127	4.8%	489	2.9%
Professional, Scientific & Tech Services	522	19.8%	1,722	10.3%
Legal Services	48	1.8%	116	0.7%
Management of Companies & Enterprises	4	0.2%	11	0.1%
Administrative & Support & Waste Management & Remediation Services	275	10.4%	839	5.0%
Educational Services	103	3.9%	1,897	11.4%
Health Care & Social Assistance	330	12.5%	3,644	21.8%
Arts, Entertainment & Recreation	54	2.0%	203	1.2%
Accommodation & Food Services	218	8.3%	1,762	10.6%
Accommodation	25	0.9%	374	2.2%
Food Services & Drinking Places	193	7.3%	1,388	8.3%
Other Services (except Public Administration)	265	10.0%	1,075	6.4%
Automotive Repair & Maintenance	18	0.7%	80	0.5%
Public Administration	13	0.5%	135	0.8%
Total	2,642	100%	16,693	100%

November 04, 2013

Business Summary

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Data for all businesses in area	98115 (SEATTLE, WA), 9810...
Total Businesses:	13,742
Total Employees:	64,406
Total Residential Population:	183,667
Employee/Residential Population Ratio:	0.35

	Businesses		Employees	
by SIC Codes	Number	Percent	Number	Percent
Agriculture & Mining	251	1.8%	709	1.1%
Construction	721	5.2%	2,288	3.6%
Manufacturing	442	3.2%	2,289	3.6%
Transportation	141	1.0%	796	1.2%
Communication	136	1.0%	542	0.8%
Utility	14	0.1%	27	0.0%
Wholesale Trade	498	3.6%	1,631	2.5%
Retail Trade Summary	1,964	14.3%	11,886	18.5%
Home Improvement	65	0.5%	314	0.5%
General Merchandise Stores	20	0.1%	73	0.1%
Food Stores	191	1.4%	2,315	3.6%
Auto Dealers, Gas Stations, Auto Aftermarket	92	0.7%	575	0.9%
Apparel & Accessory Stores	142	1.0%	709	1.1%
Furniture & Home Furnishings	169	1.2%	836	1.3%
Eating & Drinking Places	718	5.2%	4,302	6.7%
Miscellaneous Retail	567	4.1%	2,762	4.3%
Finance, Insurance, Real Estate Summary	995	7.2%	3,884	6.0%
Banks, Savings & Lending Institutions	106	0.8%	822	1.3%
Securities Brokers	52	0.4%	134	0.2%
Insurance Carriers & Agents	107	0.8%	620	1.0%
Real Estate, Holding, Other Investment Offices	730	5.3%	2,308	3.6%
Services Summary	8,526	62.0%	37,412	58.1%
Hotels & Lodging	69	0.5%	554	0.9%
Automotive Services	109	0.8%	396	0.6%
Motion Pictures & Amusements	490	3.6%	1,919	3.0%
Health Services	1,060	7.7%	7,233	11.2%
Legal Services	296	2.2%	734	1.1%
Education Institutions & Libraries	311	2.3%	6,712	10.4%
Other Services	6,191	45.1%	19,864	30.8%
Government	54	0.4%	2,942	4.6%
Totals	13,742	100%	64,406	100%

October 29, 2013

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	57	0.4%	132	0.2%
Mining	2	0.0%	4	0.0%
Utilities	8	0.1%	12	0.0%
Construction	751	5.5%	2,376	3.7%
Manufacturing	395	2.9%	2,257	3.5%
Wholesale Trade	493	3.6%	1,621	2.5%
Retail Trade	1,217	8.9%	7,440	11.6%
Motor Vehicle & Parts Dealers	68	0.5%	442	0.7%
Furniture & Home Furnishings Stores	58	0.4%	257	0.4%
Electronics & Appliance Stores	100	0.7%	525	0.8%
Bldg Material & Garden Equipment & Supplies Dealers	65	0.5%	314	0.5%
Food & Beverage Stores	167	1.2%	2,198	3.4%
Health & Personal Care Stores	80	0.6%	642	1.0%
Gasoline Stations	24	0.2%	133	0.2%
Clothing & Clothing Accessories Stores	171	1.2%	807	1.3%
Sport Goods, Hobby, Book, & Music Stores	135	1.0%	808	1.3%
General Merchandise Stores	20	0.1%	73	0.1%
Miscellaneous Store Retailers	268	2.0%	928	1.4%
Nonstore Retailers	61	0.4%	313	0.5%
Transportation & Warehousing	88	0.6%	560	0.9%
Information	504	3.7%	1,828	2.8%
Finance & Insurance	365	2.7%	1,855	2.9%
Central Bank/Credit Intermediation & Related Activities	105	0.8%	812	1.3%
Securities, Commodity Contracts & Other Financial Investments & Other Related Activities	141	1.0%	387	0.6%
Insurance Carriers & Related Activities; Funds, Trusts & Other Financial Vehicles	119	0.9%	656	1.0%
Real Estate, Rental & Leasing	619	4.5%	2,108	3.3%
Professional, Scientific & Tech Services	3,303	24.0%	9,330	14.5%
Legal Services	299	2.2%	745	1.2%
Management of Companies & Enterprises	23	0.2%	56	0.1%
Administrative & Support & Waste Management & Remediation Services	1,565	11.4%	4,273	6.6%
Educational Services	416	3.0%	6,916	10.7%
Health Care & Social Assistance	1,537	11.2%	9,688	15.0%
Arts, Entertainment & Recreation	366	2.7%	1,802	2.8%
Accommodation & Food Services	788	5.7%	4,850	7.5%
Accommodation	65	0.5%	540	0.8%
Food Services & Drinking Places	723	5.3%	4,310	6.7%
Other Services (except Public Administration)	1,191	8.7%	4,356	6.8%
Automotive Repair & Maintenance	98	0.7%	330	0.5%
Public Administration	54	0.4%	2,942	4.6%
Total	13,742	100%	64,406	100%

October 29, 2013

Tapestry Segmentation Area Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Top Twenty Tapestry Segments

Tapestry descriptions can be found here

| Rank | Tapestry Segment | Households | | U.S. Households | | |
		Percent	Cumulative Percent	Percent	Cumulative Percent	Index
1	27. Metro Renters	30.4%	30.4%	1.6%	1.6%	1845
2	09. Urban Chic	15.7%	46.1%	1.4%	3.0%	1,124
3	23. Trendsetters	14.9%	61.0%	1.2%	4.2%	1,283
4	08. Laptops and Lattes	11.3%	72.3%	1.0%	5.2%	1,118
5	63. Dorms to Diplomas	7.7%	80.0%	0.5%	5.7%	1,535
	Subtotal	**80.0%**		**5.7%**		
6	03. Connoisseurs	6.7%	86.7%	1.3%	7.0%	531
7	22. Metropolitans	5.6%	92.3%	1.4%	8.4%	392
8	05. Wealthy Seaboard Suburbs	3.8%	96.1%	1.4%	9.8%	274
9	16. Enterprising Professionals	1.7%	97.8%	1.9%	11.7%	90
10	01. Top Rung	1.6%	99.4%	0.9%	12.6%	174
	Subtotal	**19.4%**		**6.9%**		
11	55. College Towns	0.6%	100.0%	0.9%	13.5%	60
12	66. Unclassified	0.0%	100.0%	0.0%	13.5%	1,227
	Subtotal	**0.6%**		**0.9%**		
	Total	**100.0%**		**13.5%**		**739**

Top Ten Tapestry Segments Site vs. U.S.

Percent of Households by Tapestry Segment

Legend: ■ Site ■ U.S.

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.
Source: Esri

October 29, 2013

Tapestry Segmentation Area Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Tapestry Indexes by Households

Tapestry Indexes by Population

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.
Source: Esri

October 29, 2013

Tapestry Segmentation Area Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Tapestry LifeMode Groups	2013 Households			2013 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	84,826	100.0%		183,667	100.0%	
L1. High Society	**10,238**	**12.1%**	**96**	**25,705**	**14.0%**	**102**
01 Top Rung	1,326	1.6%	174	3,515	1.9%	191
02 Suburban Splendor	0	0.0%	0	0	0.0%	0
03 Connoisseurs	5,652	6.7%	531	14,041	7.6%	602
04 Boomburbs	0	0.0%	0	0	0.0%	0
05 Wealthy Seaboard Suburbs	3,260	3.8%	274	8,149	4.4%	289
06 Sophisticated Squires	0	0.0%	0	0	0.0%	0
07 Exurbanites	0	0.0%	0	0	0.0%	0
L2. Upscale Avenues	**14,792**	**17.4%**	**132**	**34,769**	**18.9%**	**145**
09 Urban Chic	13,343	15.7%	1124	31,614	17.2%	1329
10 Pleasant-Ville	0	0.0%	0	0	0.0%	0
11 Pacific Heights	0	0.0%	0	0	0.0%	0
13 In Style	0	0.0%	0	0	0.0%	0
16 Enterprising Professionals	1,449	1.7%	90	3,155	1.7%	103
17 Green Acres	0	0.0%	0	0	0.0%	0
18 Cozy and Comfortable	0	0.0%	0	0	0.0%	0
L3. Metropolis	**4,736**	**5.6%**	**105**	**10,307**	**5.6%**	**107**
20 City Lights	0	0.0%	0	0	0.0%	0
22 Metropolitans	4,736	5.6%	392	10,307	5.6%	474
45 City Strivers	0	0.0%	0	0	0.0%	0
51 Metro City Edge	0	0.0%	0	0	0.0%	0
54 Urban Rows	0	0.0%	0	0	0.0%	0
62 Modest Income Homes	0	0.0%	0	0	0.0%	0
L4. Solo Acts	**48,031**	**56.6%**	**771**	**90,149**	**49.1%**	**885**
08 Laptops and Lattes	9,626	11.3%	1118	20,701	11.3%	1506
23 Trendsetters	12,635	14.9%	1283	26,446	14.4%	1497
27 Metro Renters	25,770	30.4%	1845	43,002	23.4%	2170
36 Old and Newcomers	0	0.0%	0	0	0.0%	0
39 Young and Restless	0	0.0%	0	0	0.0%	0
L5. Senior Styles	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
14 Prosperous Empty Nesters	0	0.0%	0	0	0.0%	0
15 Silver and Gold	0	0.0%	0	0	0.0%	0
29 Rustbelt Retirees	0	100.0%	0	0	100.0%	0
30 Retirement Communities	0	0.0%	0	0	0.0%	0
43 The Elders	0	0.0%	0	0	0.0%	0
49 Senior Sun Seekers	0	0.0%	0	0	0.0%	0
50 Heartland Communities	0	0.0%	0	0	0.0%	0
57 Simple Living	0	0.0%	0	0	0.0%	0
65 Social Security Set	0	0.0%	0	0	0.0%	0
L6. Scholars & Patriots	**7,012**	**8.3%**	**517**	**18,525**	**10.1%**	**552**
40 Military Proximity	0	0.0%	0	0	0.0%	0
55 College Towns	481	0.6%	60	1,628	0.9%	101
63 Dorms to Diplomas	6,531	7.7%	1535	16,897	9.2%	1366

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.
Source: Esri

October 29, 2013

Tapestry Segmentation Area Profile

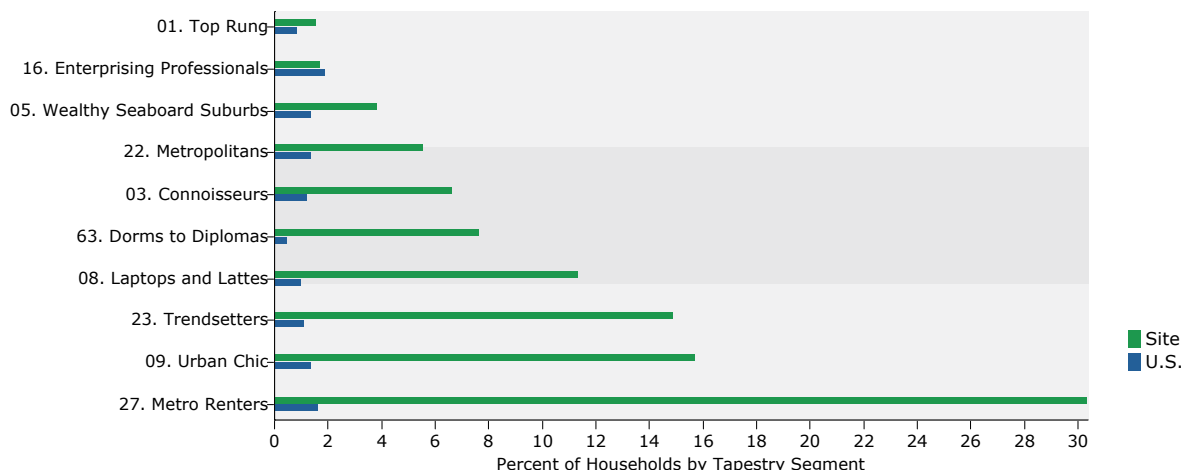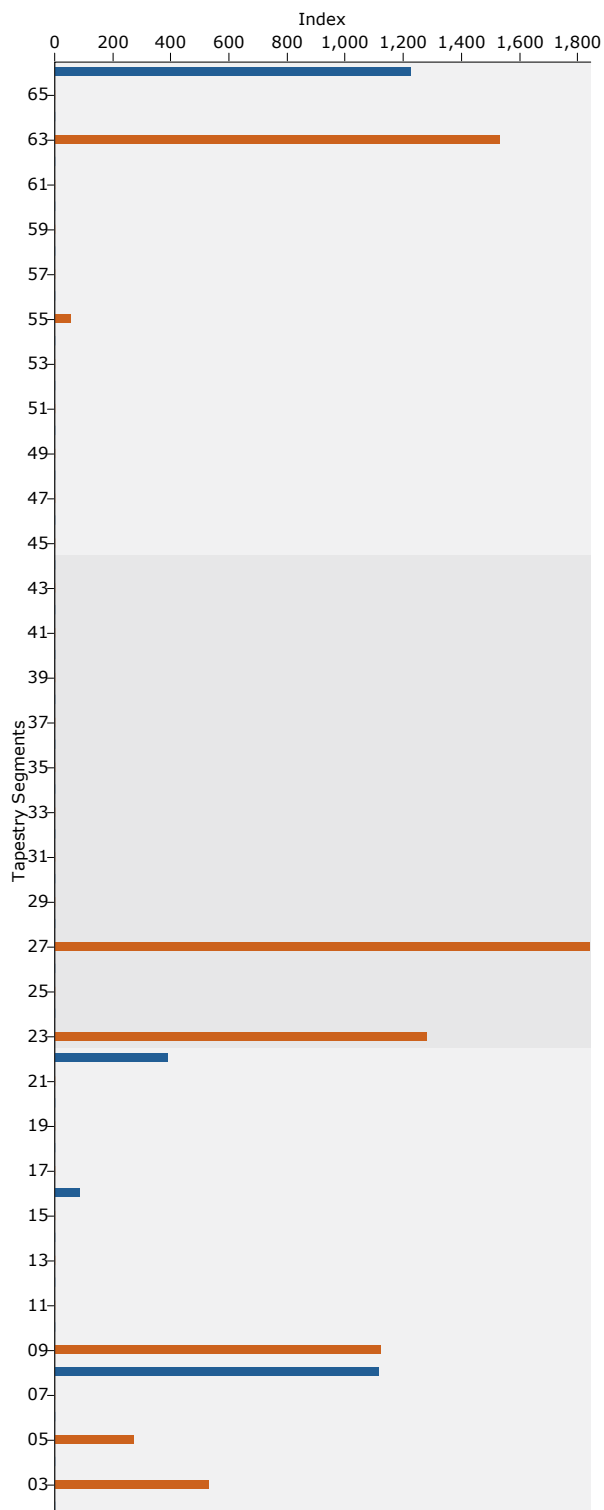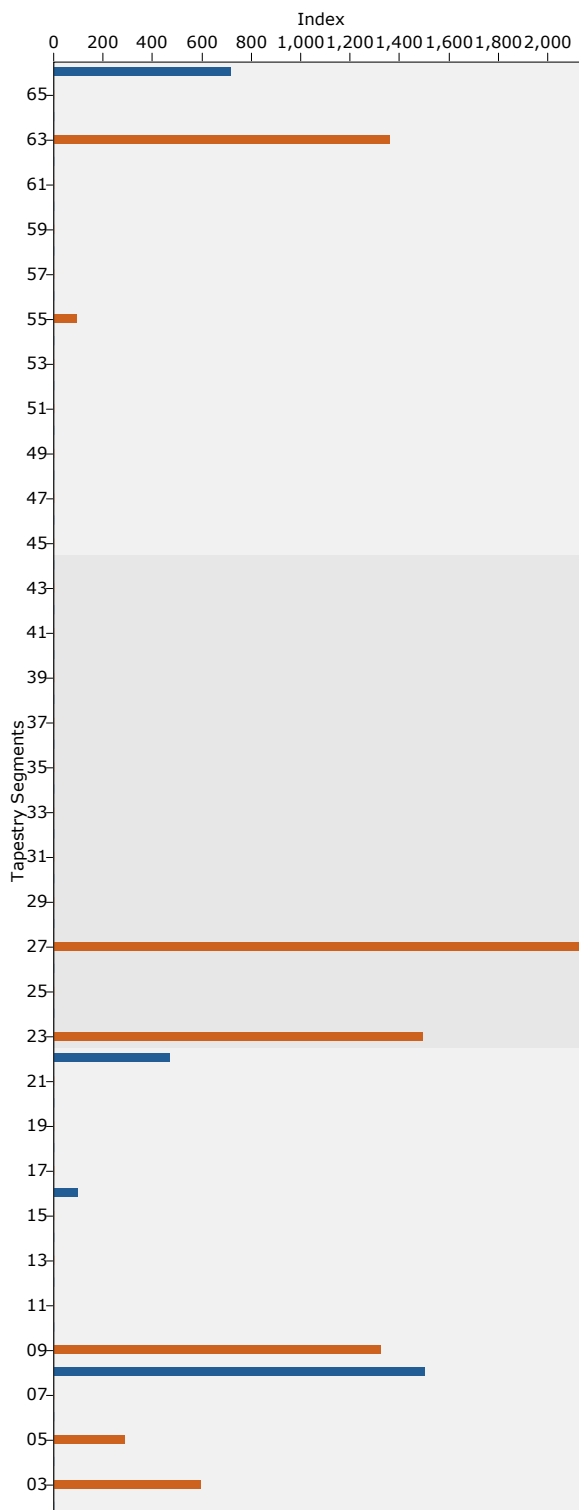University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

downtown
w o r k s

Tapestry LifeMode Groups	2013 Households			2013 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	84,826	100.0%		183,667	100.0%	
L7. High Hopes	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
28 Aspiring Young Families	0	0.0%	0	0	0.0%	0
48 Great Expectations	0	0.0%	0	0	0.0%	0
L8. Global Roots	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
35 International Marketplace	0	0.0%	0	0	0.0%	0
38 Industrious Urban Fringe	0	0.0%	0	0	0.0%	0
44 Urban Melting Pot	0	0.0%	0	0	0.0%	0
47 Las Casas	0	0.0%	0	0	0.0%	0
52 Inner City Tenants	0	0.0%	0	0	0.0%	0
58 NeWest Residents	0	0.0%	0	0	0.0%	0
60 City Dimensions	0	0.0%	0	0	0.0%	0
61 High Rise Renters	0	0.0%	0	0	0.0%	0
L9. Family Portrait	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
12 Up and Coming Families	0	0.0%	0	0	0.0%	0
19 Milk and Cookies	0	0.0%	0	0	0.0%	0
21 Urban Villages	0	0.0%	0	0	0.0%	0
59 Southwestern Families	0	0.0%	0	0	0.0%	0
64 City Commons	0	0.0%	0	0	0.0%	0
L10. Traditional Living	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
24 Main Street, USA	0	0.0%	0	0	0.0%	0
32 Rustbelt Traditions	0	0.0%	0	0	0.0%	0
33 Midlife Junction	0	0.0%	0	0	0.0%	0
34 Family Foundations	0	0.0%	0	0	0.0%	0
L11. Factories & Farms	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
25 Salt of the Earth	0	0.0%	0	0	0.0%	0
37 Prairie Living	0	0.0%	0	0	0.0%	0
42 Southern Satellites	0	0.0%	0	0	0.0%	0
53 Home Town	0	0.0%	0	0	0.0%	0
56 Rural Bypasses	0	0.0%	0	0	0.0%	0
L12. American Quilt	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
26 Midland Crowd	0	0.0%	0	0	0.0%	0
31 Rural Resort Dwellers	0	0.0%	0	0	0.0%	0
41 Crossroads	0	0.0%	0	0	0.0%	0
46 Rooted Rural	0	0.0%	0	0	0.0%	0
66 Unclassified	17	0.0%	1227	4,212	2.3%	721

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.
Source: Esri

October 29, 2013

Tapestry Segmentation Area Profile

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Tapestry Urbanization Groups	2013 Households			2013 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	84,826	100.0%		183,667	100.0%	
U1. Principal Urban Centers I	**48,031**	**56.6%**	**673**	**90,149**	**49.1%**	**598**
08 Laptops and Lattes	9,626	11.3%	1118	20,701	11.3%	1506
11 Pacific Heights	0	0.0%	0	0	0.0%	0
20 City Lights	0	0.0%	0	0	0.0%	0
21 Urban Villages	0	0.0%	0	0	0.0%	0
23 Trendsetters	12,635	14.9%	1283	26,446	14.4%	1497
27 Metro Renters	25,770	30.4%	1845	43,002	23.4%	2170
35 International Marketplace	0	0.0%	0	0	0.0%	0
44 Urban Melting Pot	0	0.0%	0	0	0.0%	0
U2. Principal Urban Centers II	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
45 City Strivers	0	0.0%	0	0	0.0%	0
47 Las Casas	0	0.0%	0	0	0.0%	0
54 Urban Rows	0	0.0%	0	0	0.0%	0
58 NeWest Residents	0	0.0%	0	0	0.0%	0
61 High Rise Renters	0	0.0%	0	0	0.0%	0
64 City Commons	0	0.0%	0	0	0.0%	0
65 Social Security Set	0	0.0%	0	0	0.0%	0
U3. Metro Cities I	**29,766**	**35.1%**	**290**	**70,781**	**38.5%**	**316**
01 Top Rung	1,326	1.6%	174	3,515	1.9%	191
03 Connoisseurs	5,652	6.7%	531	14,041	7.6%	602
05 Wealthy Seaboard Suburbs	3,260	3.8%	274	8,149	4.4%	289
09 Urban Chic	13,343	15.7%	1124	31,614	17.2%	1329
10 Pleasant-Ville	0	0.0%	0	0	0.0%	0
16 Enterprising Professionals	1,449	1.7%	90	3,155	1.7%	103
19 Milk and Cookies	0	0.0%	0	0	0.0%	0
22 Metropolitans	4,736	5.6%	392	10,307	5.6%	474
U4. Metro Cities II	**6,531**	**7.7%**	**70**	**16,897**	**9.2%**	**91**
28 Aspiring Young Families	0	0.0%	0	0	0.0%	0
30 Retirement Communities	0	0.0%	0	0	0.0%	0
34 Family Foundations	0	0.0%	0	0	0.0%	0
36 Old and Newcomers	0	0.0%	0	0	0.0%	0
39 Young and Restless	0	0.0%	0	0	0.0%	0
52 Inner City Tenants	0	0.0%	0	0	0.0%	0
60 City Dimensions	0	0.0%	0	0	0.0%	0
63 Dorms to Diplomas	6,531	7.7%	1535	16,897	9.2%	1366
U5. Urban Outskirts I	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
04 Boomburbs	0	0.0%	0	0	0.0%	0
24 Main Street, USA	0	0.0%	0	0	0.0%	0
32 Rustbelt Traditions	0	0.0%	0	0	0.0%	0
38 Industrious Urban Fringe	0	0.0%	0	0	0.0%	0
48 Great Expectations	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.
Source: Esri

October 29, 2013

University District - Primary Trade Area
98115 (SEATTLE, WA), 98103 (SEATTLE, WA) et al.
Geographies: 6 ZIP Codes

Tapestry Urbanization Groups	2013 Households			2013 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	84,826	100.0%		183,667	100.0%	
U6. Urban Outskirts II	**481**	**0.6%**	**11**	**1,628**	**0.9%**	**17**
51 Metro City Edge	0	0.0%	0	0	0.0%	0
55 College Towns	481	0.6%	60	1,628	0.9%	101
57 Simple Living	0	0.0%	0	0	0.0%	0
59 Southwestern Families	0	0.0%	0	0	0.0%	0
62 Modest Income Homes	0	0.0%	0	0	0.0%	0
U7. Suburban Periphery I	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
02 Suburban Splendor	0	0.0%	0	0	0.0%	0
06 Sophisticated Squires	0	0.0%	0	0	0.0%	0
07 Exurbanites	0	0.0%	0	0	0.0%	0
12 Up and Coming Families	0	0.0%	0	0	0.0%	0
13 In Style	0	0.0%	0	0	0.0%	0
14 Prosperous Empty Nesters	0	0.0%	0	0	0.0%	0
15 Silver and Gold	0	0.0%	0	0	0.0%	0
U8. Suburban Periphery II	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
18 Cozy and Comfortable	0	0.0%	0	0	0.0%	0
29 Rustbelt Retirees	0	0.0%	0	0	0.0%	0
33 Midlife Junction	0	0.0%	0	0	0.0%	0
40 Military Proximity	0	0.0%	0	0	0.0%	0
43 The Elders	0	0.0%	0	0	0.0%	0
53 Home Town	0	0.0%	0	0	0.0%	0
U9. Small Towns	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
41 Crossroads	0	0.0%	0	0	0.0%	0
49 Senior Sun Seekers	0	0.0%	0	0	0.0%	0
50 Heartland Communities	0	0.0%	0	0	0.0%	0
U10. Rural I	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
17 Green Acres	0	0.0%	0	0	0.0%	0
25 Salt of the Earth	0	0.0%	0	0	0.0%	0
26 Midland Crowd	0	0.0%	0	0	0.0%	0
31 Rural Resort Dwellers	0	0.0%	0	0	0.0%	0
U11. Rural II	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
37 Prairie Living	0	0.0%	0	0	0.0%	0
42 Southern Satellites	0	0.0%	0	0	0.0%	0
46 Rooted Rural	0	0.0%	0	0	0.0%	0
56 Rural Bypasses	0	0.0%	0	0	0.0%	0
66 Unclassified	17	0.0%	1227	4,212	2.3%	721

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.
Source: Esri

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University District - Secondary Trade Area

98177 98133
98155
98125
98117
98107
98199
98119
98033
98109
98121
98101 98122
98104
98039 98004 98005
98144
98134
98116
98126
98040
98136 98106 98108 98118

downtown
works

Executive Summary

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
Population	
2000 Population	551,696
2010 Population	592,864
2013 Population	616,773
2018 Population	663,302
2000-2010 Annual Rate	0.72%
2010-2013 Annual Rate	1.22%
2013-2018 Annual Rate	1.47%
2013 Male Population	49.8%
2013 Female Population	50.2%
2013 Median Age	39.2

In the identified area, the current year population is 616,773. In 2010, the Census count in the area was 592,864. The rate of change since 2010 was 1.22% annually. The five-year projection for the population in the area is 663,302 representing a change of 1.47% annually from 2013 to 2018. Currently, the population is 49.8% male and 50.2% female.

Median Age	

The median age in this area is 39.2, compared to U.S. median age of 37.3.

Race and Ethnicity	
2013 White Alone	67.0%
2013 Black Alone	7.9%
2013 American Indian/Alaska Native Alone	0.8%
2013 Asian Alone	15.6%
2013 Pacific Islander Alone	0.4%
2013 Other Race	2.9%
2013 Two or More Races	5.2%
2013 Hispanic Origin (Any Race)	7.7%

Persons of Hispanic origin represent 7.7% of the population in the identified area compared to 17.4% of the U.S. population. Persons of Hispanic Origin may be of any race. The Diversity Index, which measures the probability that two people from the same area will be from different race/ethnic groups, is 58.8 in the identified area, compared to 62.1 for the U.S. as a whole.

Households	
2000 Households	244,495
2010 Households	270,709
2013 Total Households	282,841
2018 Total Households	305,150
2000-2010 Annual Rate	1.02%
2010-2013 Annual Rate	1.36%
2013-2018 Annual Rate	1.53%
2013 Average Household Size	2.12

The household count in this area has changed from 270,709 in 2010 to 282,841 in the current year, a change of 1.36% annually. The five-year projection of households is 305,150, a change of 1.53% annually from the current year total. Average household size is currently 2.12, compared to 2.13 in the year 2010. The number of families in the current year is 135,984 in the specified area.

October 29, 2013

downtown
works

Executive Summary

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
Median Household Income	
2013 Median Household Income	$61,590
2018 Median Household Income	$77,297
2013-2018 Annual Rate	4.65%
Average Household Income	
2013 Average Household Income	$88,757
2018 Average Household Income	$107,461
2013-2018 Annual Rate	3.90%
Per Capita Income	
2013 Per Capita Income	$41,237
2018 Per Capita Income	$49,934
2013-2018 Annual Rate	3.90%
Households by Income	

Current median household income is $61,590 in the area, compared to $51,314 for all U.S. households. Median household income is projected to be $77,297 in five years, compared to $59,580 for all U.S. households

Current average household income is $88,757 in this area, compared to $71,842 for all U.S households. Average household income is projected to be $107,461 in five years, compared to $83,667 for all U.S. households

Current per capita income is $41,237 in the area, compared to the U.S. per capita income of $27,567. The per capita income is projected to be $49,934 in five years, compared to $32,073 for all U.S. households

Housing	
2000 Total Housing Units	257,141
2000 Owner Occupied Housing Units	130,938
2000 Owner Occupied Housing Units	113,559
2000 Vacant Housing Units	12,644
2010 Total Housing Units	297,298
2010 Owner Occupied Housing Units	140,545
2010 Renter Occupied Housing Units	130,166
2010 Vacant Housing Units	26,589
2013 Total Housing Units	305,015
2013 Owner Occupied Housing Units	142,470
2013 Renter Occupied Housing Units	140,371
2013 Vacant Housing Units	22,174
2018 Total Housing Units	325,406
2018 Owner Occupied Housing Units	153,082
2018 Renter Occupied Housing Units	152,068
2018 Vacant Housing Units	20,256

Currently, 46.7% of the 305,015 housing units in the area are owner occupied; 46.0%, renter occupied; and 7.3% are vacant. Currently, in the U.S., 56.4% of the housing units in the area are owner occupied; 32.3% are renter occupied; and 11.3% are vacant. In 2010, there were 297,298 housing units in the area - 47.3% owner occupied, 43.8% renter occupied, and 8.9% vacant. The annual rate of change in housing units since 2010 is 1.15%. Median home value in the area is $406,914, compared to a median home value of $177,257 for the U.S. In five years, median value is projected to change by 3.37% annually to $480,162.

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Market Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
Population Summary	
2000 Total Population	551,696
2010 Total Population	592,864
2013 Total Population	616,773
2013 Group Quarters	16,530
2018 Total Population	663,302
2013-2018 Annual Rate	1.47%
Household Summary	
2000 Households	244,495
2000 Average Household Size	2.17
2010 Households	270,709
2010 Average Household Size	2.13
2013 Households	282,841
2013 Average Household Size	2.12
2018 Households	305,150
2018 Average Household Size	2.12
2013-2018 Annual Rate	1.53%
2010 Families	131,044
2010 Average Family Size	2.90
2013 Families	135,984
2013 Average Family Size	2.89
2018 Families	145,283
2018 Average Family Size	2.88
2013-2018 Annual Rate	1.33%
Housing Unit Summary	
2000 Housing Units	257,141
Owner Occupied Housing Units	50.9%
Renter Occupied Housing Units	44.2%
Vacant Housing Units	4.9%
2010 Housing Units	297,298
Owner Occupied Housing Units	47.3%
Renter Occupied Housing Units	43.8%
Vacant Housing Units	8.9%
2013 Housing Units	305,015
Owner Occupied Housing Units	46.7%
Renter Occupied Housing Units	46.0%
Vacant Housing Units	7.3%
2018 Housing Units	325,406
Owner Occupied Housing Units	47.0%
Renter Occupied Housing Units	46.7%
Vacant Housing Units	6.2%
Median Household Income	
2013	$61,590
2018	$77,297
Median Home Value	
2013	$406,914
2018	$480,162
Per Capita Income	
2013	$41,237
2018	$49,934
Median Age	
2010	38.5
2013	39.2
2018	39.9

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

October 29, 2013

Market Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
2013 Households by Income	
Household Income Base	282,841
<$15,000	12.1%
$15,000 - $24,999	8.4%
$25,000 - $34,999	8.6%
$35,000 - $49,999	12.1%
$50,000 - $74,999	15.9%
$75,000 - $99,999	12.9%
$100,000 - $149,999	16.5%
$150,000 - $199,999	6.2%
$200,000+	7.2%
Average Household Income	$88,757
2018 Households by Income	
Household Income Base	305,150
<$15,000	11.4%
$15,000 - $24,999	6.3%
$25,000 - $34,999	6.9%
$35,000 - $49,999	10.1%
$50,000 - $74,999	13.5%
$75,000 - $99,999	15.7%
$100,000 - $149,999	20.1%
$150,000 - $199,999	8.1%
$200,000+	8.0%
Average Household Income	$107,461
2013 Owner Occupied Housing Units by Value	
Total	142,470
<$50,000	0.1%
$50,000 - $99,999	0.6%
$100,000 - $149,999	1.8%
$150,000 - $199,999	4.0%
$200,000 - $249,999	6.5%
$250,000 - $299,999	10.4%
$300,000 - $399,999	25.4%
$400,000 - $499,999	17.6%
$500,000 - $749,999	18.9%
$750,000 - $999,999	6.8%
$1,000,000 +	7.9%
Average Home Value	$497,460
2018 Owner Occupied Housing Units by Value	
Total	153,082
<$50,000	0.0%
$50,000 - $99,999	0.2%
$100,000 - $149,999	0.5%
$150,000 - $199,999	1.4%
$200,000 - $249,999	2.9%
$250,000 - $299,999	6.2%
$300,000 - $399,999	23.7%
$400,000 - $499,999	18.7%
$500,000 - $749,999	24.6%
$750,000 - $999,999	12.1%
$1,000,000 +	9.6%
Average Home Value	$573,362

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

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University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
2010 Population by Age	
Total	592,870
0 - 4	5.4%
5 - 9	4.8%
10 - 14	4.4%
15 - 24	11.5%
25 - 34	18.3%
35 - 44	16.1%
45 - 54	14.6%
55 - 64	12.5%
65 - 74	6.3%
75 - 84	4.0%
85 +	2.4%
18 +	82.7%
2013 Population by Age	
Total	616,773
0 - 4	5.1%
5 - 9	4.9%
10 - 14	4.6%
15 - 24	11.3%
25 - 34	17.5%
35 - 44	15.4%
45 - 54	14.4%
55 - 64	13.0%
65 - 74	7.3%
75 - 84	3.9%
85 +	2.4%
18 +	82.7%
2018 Population by Age	
Total	663,302
0 - 4	5.0%
5 - 9	4.8%
10 - 14	4.8%
15 - 24	10.9%
25 - 34	16.9%
35 - 44	14.6%
45 - 54	13.7%
55 - 64	13.2%
65 - 74	9.1%
75 - 84	4.4%
85 +	2.5%
18 +	82.7%
2010 Population by Sex	
Males	294,912
Females	297,950
2013 Population by Sex	
Males	307,052
Females	309,721
2018 Population by Sex	
Males	330,521
Females	332,781

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

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Market Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
2010 Population by Race/Ethnicity	
Total	592,863
White Alone	68.1%
Black Alone	7.9%
American Indian Alone	0.8%
Asian Alone	15.3%
Pacific Islander Alone	0.4%
Some Other Race Alone	2.6%
Two or More Races	4.9%
Hispanic Origin	6.8%
Diversity Index	56.9
2013 Population by Race/Ethnicity	
Total	616,773
White Alone	67.0%
Black Alone	7.9%
American Indian Alone	0.8%
Asian Alone	15.6%
Pacific Islander Alone	0.4%
Some Other Race Alone	2.9%
Two or More Races	5.2%
Hispanic Origin	7.7%
Diversity Index	58.8
2018 Population by Race/Ethnicity	
Total	663,302
White Alone	65.0%
Black Alone	8.1%
American Indian Alone	0.9%
Asian Alone	16.5%
Pacific Islander Alone	0.4%
Some Other Race Alone	3.4%
Two or More Races	5.7%
Hispanic Origin	9.3%
Diversity Index	62.1
2010 Population by Relationship and Household Type	
Total	592,866
In Households	97.2%
In Family Households	66.3%
Householder	22.1%
Spouse	16.9%
Child	21.7%
Other relative	3.5%
Nonrelative	2.1%
In Nonfamily Households	30.9%
In Group Quarters	2.8%
Institutionalized Population	0.9%
Noninstitutionalized Population	2.0%

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Market Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
2013 Population 25+ by Educational Attainment	
Total	456,563
Less than 9th Grade	3.9%
9th - 12th Grade, No Diploma	4.2%
High School Graduate	13.5%
Some College, No Degree	18.7%
Associate Degree	7.3%
Bachelor's Degree	32.2%
Graduate/Professional Degree	20.2%
2013 Population 15+ by Marital Status	
Total	526,544
Never Married	36.3%
Married	46.6%
Widowed	5.2%
Divorced	12.0%
2013 Civilian Population 16+ in Labor Force	
Civilian Employed	94.5%
Civilian Unemployed	5.5%
2013 Employed Population 16+ by Industry	
Total	334,699
Agriculture/Mining	0.4%
Construction	3.8%
Manufacturing	7.4%
Wholesale Trade	2.2%
Retail Trade	10.9%
Transportation/Utilities	3.7%
Information	3.2%
Finance/Insurance/Real Estate	6.6%
Services	58.7%
Public Administration	3.1%
2013 Employed Population 16+ by Occupation	
Total	334,699
White Collar	72.2%
Management/Business/Financial	20.5%
Professional	31.2%
Sales	10.0%
Administrative Support	10.6%
Services	16.8%
Blue Collar	10.9%
Farming/Forestry/Fishing	0.2%
Construction/Extraction	2.6%
Installation/Maintenance/Repair	1.6%
Production	3.0%
Transportation/Material Moving	3.5%

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University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
2010 Households by Type	
Total	270,705
Households with 1 Person	39.0%
Households with 2+ People	61.0%
Family Households	48.4%
Husband-wife Families	37.1%
With Related Children	15.3%
Other Family (No Spouse Present)	11.3%
Other Family with Male Householder	3.3%
With Related Children	1.6%
Other Family with Female Householder	8.0%
With Related Children	4.7%
Nonfamily Households	12.6%
All Households with Children	22.0%
Multigenerational Households	1.9%
Unmarried Partner Households	8.6%
Male-female	6.7%
Same-sex	1.9%
2010 Households by Size	
Total	270,702
1 Person Household	39.0%
2 Person Household	33.4%
3 Person Household	12.8%
4 Person Household	9.4%
5 Person Household	3.3%
6 Person Household	1.2%
7 + Person Household	0.9%
2010 Households by Tenure and Mortgage Status	
Total	270,711
Owner Occupied	51.9%
Owned with a Mortgage/Loan	39.6%
Owned Free and Clear	12.3%
Renter Occupied	48.1%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

October 29, 2013

Market Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

	98117 (SEATTLE, WA), 9810...
Top 3 Tapestry Segments	
1.	Metro Renters
2.	Urban Chic
3.	Trendsetters
2013 Consumer Spending	
Apparel & Services: Total $	$558,279,151
Average Spent	$1,973.83
Spending Potential Index	87
Computers & Accessories: Total $	$93,782,569
Average Spent	$331.57
Spending Potential Index	133
Education: Total $	$591,626,158
Average Spent	$2,091.73
Spending Potential Index	143
Entertainment/Recreation: Total $	$1,151,510,034
Average Spent	$4,071.23
Spending Potential Index	125
Food at Home: Total $	$1,729,902,011
Average Spent	$6,116.16
Spending Potential Index	122
Food Away from Home: Total $	$1,167,182,095
Average Spent	$4,126.64
Spending Potential Index	129
Health Care: Total $	$1,415,443,851
Average Spent	$5,004.38
Spending Potential Index	112
HH Furnishings & Equipment: Total $	$555,853,728
Average Spent	$1,965.25
Spending Potential Index	109
Investments: Total $	$1,015,305,196
Average Spent	$3,589.67
Spending Potential Index	173
Retail Goods: Total $	$7,788,099,799
Average Spent	$27,535.26
Spending Potential Index	114
Shelter: Total $	$6,194,569,470
Average Spent	$21,901.24
Spending Potential Index	135
TV/Video/Audio:Total $	$437,699,849
Average Spent	$1,547.51
Spending Potential Index	120
Travel: Total $	$669,219,554
Average Spent	$2,366.06
Spending Potential Index	129
Vehicle Maintenance & Repairs: Total $	$376,813,539
Average Spent	$1,332.25
Spending Potential Index	122

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.
Source: Consumer Spending data are derived from the 2010 and 2011 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

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Detailed Age Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Summary	Census 2010	2013	2018	2013-2018 Change	2013-2018 Annual Rate
Population	592,864	616,773	663,302	46,529	1.47%
Households	270,709	282,841	305,150	22,309	1.53%
Average Household Size	2.13	2.12	2.12	0.00	0.00%

	Census 2010		2013		2018	
Total Population by Detailed Age	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Total	592,860	100.0%	616,773	100.0%	663,302	100.0%
<1	6,824	1.2%	6,534	1.1%	6,888	1.0%
1	6,418	1.1%	6,292	1.0%	6,592	1.0%
2	6,452	1.1%	6,452	1.0%	6,776	1.0%
3	6,297	1.1%	6,196	1.0%	6,470	1.0%
4	5,755	1.0%	5,936	1.0%	6,225	0.9%
5	5,942	1.0%	6,285	1.0%	6,568	1.0%
6	5,817	1.0%	6,171	1.0%	6,466	1.0%
7	5,715	1.0%	6,097	1.0%	6,384	1.0%
8	5,341	0.9%	5,775	0.9%	6,067	0.9%
9	5,470	0.9%	5,982	1.0%	6,347	1.0%
10	5,311	0.9%	5,779	0.9%	6,454	1.0%
11	5,280	0.9%	5,876	1.0%	6,624	1.0%
12	5,251	0.9%	5,729	0.9%	6,511	1.0%
13	5,026	0.8%	5,529	0.9%	6,270	0.9%
14	5,156	0.9%	5,596	0.9%	6,281	0.9%
15	5,286	0.9%	5,396	0.9%	5,847	0.9%
16	5,515	0.9%	5,438	0.9%	5,825	0.9%
17	5,654	1.0%	5,482	0.9%	5,839	0.9%
18	6,001	1.0%	6,019	1.0%	6,341	1.0%
19	6,368	1.1%	6,737	1.1%	7,081	1.1%
20 - 24	39,183	6.6%	40,909	6.6%	41,668	6.3%
25 - 29	56,307	9.5%	53,394	8.7%	58,115	8.8%
30 - 34	51,991	8.8%	54,726	8.9%	53,969	8.1%
35 - 39	48,586	8.2%	47,481	7.7%	51,281	7.7%
40 - 44	46,610	7.9%	47,621	7.7%	45,802	6.9%
45 - 49	43,517	7.3%	44,467	7.2%	46,239	7.0%
50 - 54	42,951	7.2%	44,218	7.2%	44,599	6.7%
55 - 59	40,493	6.8%	42,383	6.9%	45,107	6.8%
60 - 64	33,390	5.6%	37,907	6.1%	42,644	6.4%
65 - 69	22,047	3.7%	26,854	4.4%	35,413	5.3%
70 - 74	15,100	2.5%	18,259	3.0%	25,224	3.8%
75 - 79	12,495	2.1%	13,262	2.2%	17,073	2.6%
80 - 84	11,225	1.9%	11,078	1.8%	12,017	1.8%
85+	14,086	2.4%	14,913	2.4%	16,295	2.5%
<18	102,513	17.3%	106,545	17.3%	114,434	17.3%
18+	490,353	82.7%	510,228	82.7%	548,868	82.7%
21+	471,372	79.5%	490,161	79.5%	527,989	79.6%
Median Age	38.5		39.2		39.9	

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Detailed Age Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Total Population by Detailed Age
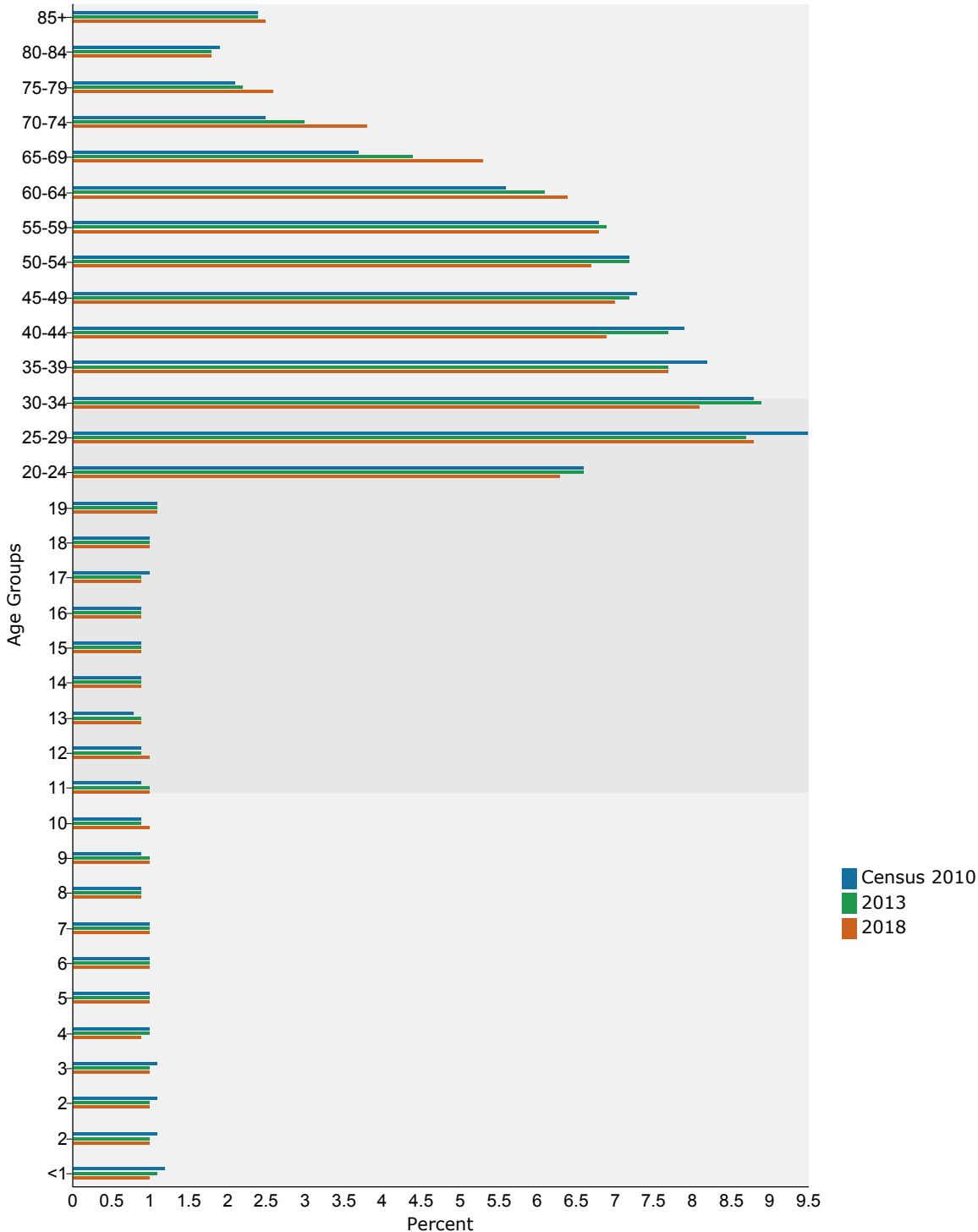
Legend:
- Census 2010
- 2013
- 2018

X-axis: Percent
Y-axis: Age Groups

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018.

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Detailed Age Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Male Population by Detailed Age	Census 2010		2013		2018	
	Number	Percent	Number	Percent	Number	Percent
Total	294,901	100.0%	307,052	100.0%	330,521	100.0%
<1	3,536	1.2%	3,391	1.1%	3,571	1.1%
1	3,317	1.1%	3,278	1.1%	3,420	1.0%
2	3,378	1.1%	3,348	1.1%	3,515	1.1%
3	3,231	1.1%	3,157	1.0%	3,303	1.0%
4	2,973	1.0%	3,097	1.0%	3,263	1.0%
5	3,062	1.0%	3,233	1.1%	3,402	1.0%
6	2,974	1.0%	3,194	1.0%	3,349	1.0%
7	2,895	1.0%	3,104	1.0%	3,281	1.0%
8	2,638	0.9%	2,940	1.0%	3,110	0.9%
9	2,758	0.9%	3,074	1.0%	3,279	1.0%
10	2,705	0.9%	2,978	1.0%	3,348	1.0%
11	2,666	0.9%	2,963	1.0%	3,380	1.0%
12	2,628	0.9%	2,882	0.9%	3,330	1.0%
13	2,585	0.9%	2,802	0.9%	3,207	1.0%
14	2,625	0.9%	2,832	0.9%	3,205	1.0%
15	2,737	0.9%	2,742	0.9%	2,963	0.9%
16	2,895	1.0%	2,809	0.9%	2,984	0.9%
17	2,898	1.0%	2,798	0.9%	2,966	0.9%
18	3,041	1.0%	2,990	1.0%	3,134	0.9%
19	2,997	1.0%	3,185	1.0%	3,335	1.0%
20 - 24	19,257	6.5%	20,213	6.6%	20,200	6.1%
25 - 29	28,676	9.7%	27,204	8.9%	29,690	9.0%
30 - 34	26,798	9.1%	28,258	9.2%	28,260	8.6%
35 - 39	25,168	8.5%	24,481	8.0%	26,657	8.1%
40 - 44	24,548	8.3%	24,828	8.1%	23,696	7.2%
45 - 49	22,562	7.7%	23,176	7.5%	23,917	7.2%
50 - 54	21,673	7.3%	22,518	7.3%	22,897	6.9%
55 - 59	19,947	6.8%	20,974	6.8%	22,514	6.8%
60 - 64	16,091	5.5%	18,285	6.0%	20,696	6.3%
65 - 69	10,518	3.6%	12,762	4.2%	16,842	5.1%
70 - 74	6,855	2.3%	8,382	2.7%	11,653	3.5%
75 - 79	5,327	1.8%	5,758	1.9%	7,591	2.3%
80 - 84	4,377	1.5%	4,402	1.4%	4,904	1.5%
85+	4,565	1.5%	5,014	1.6%	5,659	1.7%
<18	52,513	17.8%	54,622	17.8%	58,876	17.8%
18+	242,400	82.2%	252,430	82.2%	271,645	82.2%
21+	233,144	79.1%	242,703	79.0%	261,605	79.1%
Median Age	37.8		38.5		39.1	

October 29, 2013

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Male Population by Detailed Age

Legend:
- Census 2010
- 2013
- 2018

Y-axis: Age Groups
X-axis: Percent

October 29, 2013

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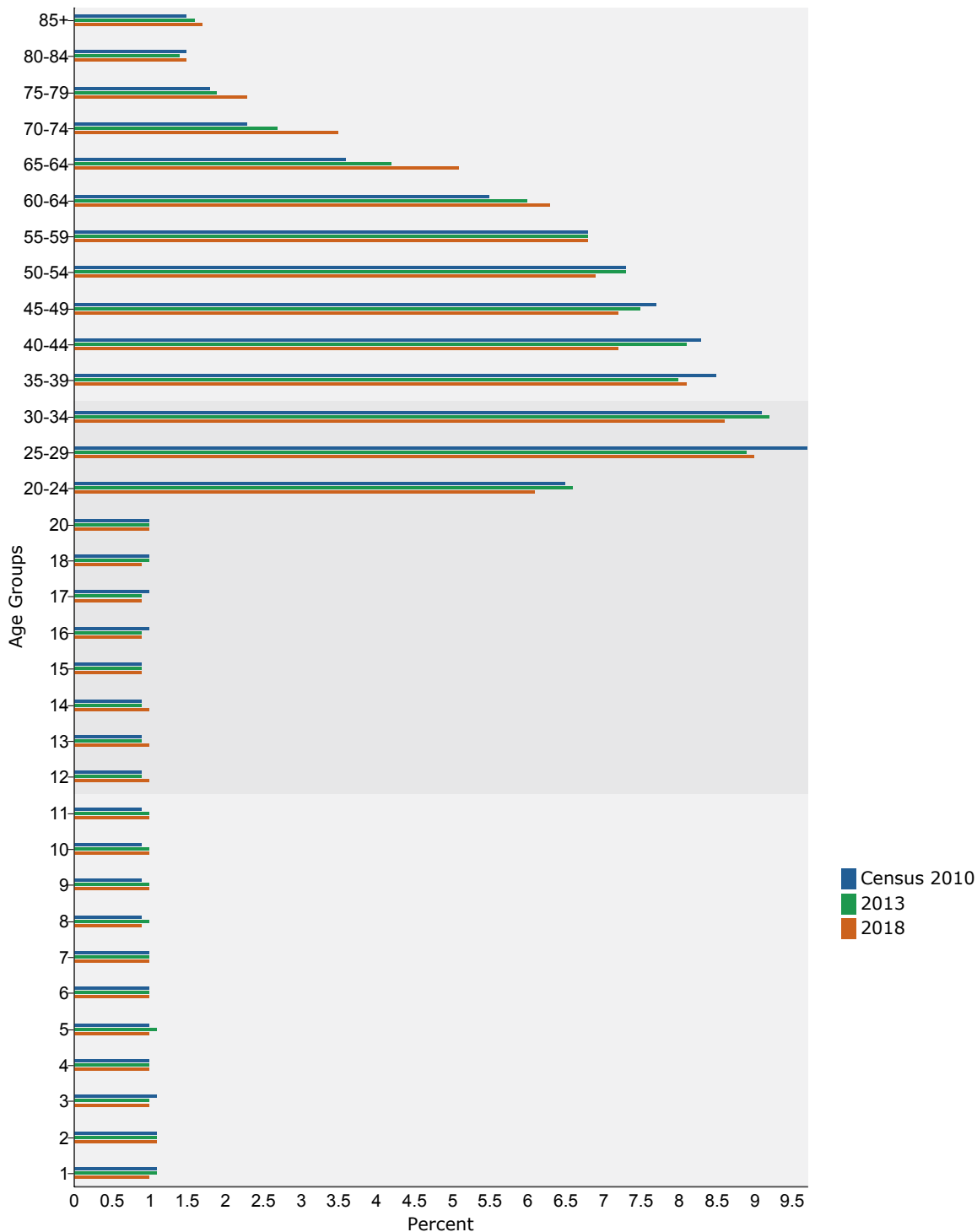
Detailed Age Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Female Population by Detailed Age	Census 2010		2013		2018	
	Number	Percent	Number	Percent	Number	Percent
Total	297,959	100.0%	309,721	100.0%	332,781	100.0%
<1	3,288	1.1%	3,143	1.0%	3,317	1.0%
1	3,101	1.0%	3,014	1.0%	3,172	1.0%
2	3,074	1.0%	3,104	1.0%	3,261	1.0%
3	3,066	1.0%	3,039	1.0%	3,167	1.0%
4	2,782	0.9%	2,839	0.9%	2,962	0.9%
5	2,880	1.0%	3,052	1.0%	3,166	1.0%
6	2,843	1.0%	2,977	1.0%	3,117	0.9%
7	2,820	0.9%	2,993	1.0%	3,103	0.9%
8	2,703	0.9%	2,835	0.9%	2,957	0.9%
9	2,712	0.9%	2,908	0.9%	3,068	0.9%
10	2,606	0.9%	2,801	0.9%	3,106	0.9%
11	2,614	0.9%	2,913	0.9%	3,244	1.0%
12	2,623	0.9%	2,847	0.9%	3,181	1.0%
13	2,441	0.8%	2,727	0.9%	3,063	0.9%
14	2,531	0.8%	2,764	0.9%	3,076	0.9%
15	2,549	0.9%	2,654	0.9%	2,884	0.9%
16	2,620	0.9%	2,629	0.8%	2,841	0.9%
17	2,756	0.9%	2,684	0.9%	2,873	0.9%
18	2,960	1.0%	3,029	1.0%	3,207	1.0%
19	3,371	1.1%	3,552	1.1%	3,746	1.1%
20 - 24	19,926	6.7%	20,696	6.7%	21,468	6.5%
25 - 29	27,631	9.3%	26,190	8.5%	28,425	8.5%
30 - 34	25,193	8.5%	26,468	8.5%	25,709	7.7%
35 - 39	23,418	7.9%	23,000	7.4%	24,624	7.4%
40 - 44	22,062	7.4%	22,793	7.4%	22,106	6.6%
45 - 49	20,955	7.0%	21,291	6.9%	22,322	6.7%
50 - 54	21,278	7.1%	21,700	7.0%	21,702	6.5%
55 - 59	20,546	6.9%	21,409	6.9%	22,593	6.8%
60 - 64	17,299	5.8%	19,622	6.3%	21,948	6.6%
65 - 69	11,529	3.9%	14,092	4.5%	18,571	5.6%
70 - 74	8,245	2.8%	9,877	3.2%	13,571	4.1%
75 - 79	7,168	2.4%	7,504	2.4%	9,482	2.8%
80 - 84	6,848	2.3%	6,676	2.2%	7,113	2.1%
85+	9,521	3.2%	9,899	3.2%	10,636	3.2%
<18	50,000	16.8%	51,923	16.8%	55,558	16.7%
18+	247,950	83.2%	257,798	83.2%	277,223	83.3%
21+	238,228	80.0%	247,458	79.9%	266,384	80.0%
Median Age	39.2		40.0		40.8	

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Female Population by Detailed Age

Legend:
- Census 2010
- 2013
- 2018

Age Groups (y-axis)
Percent (x-axis)
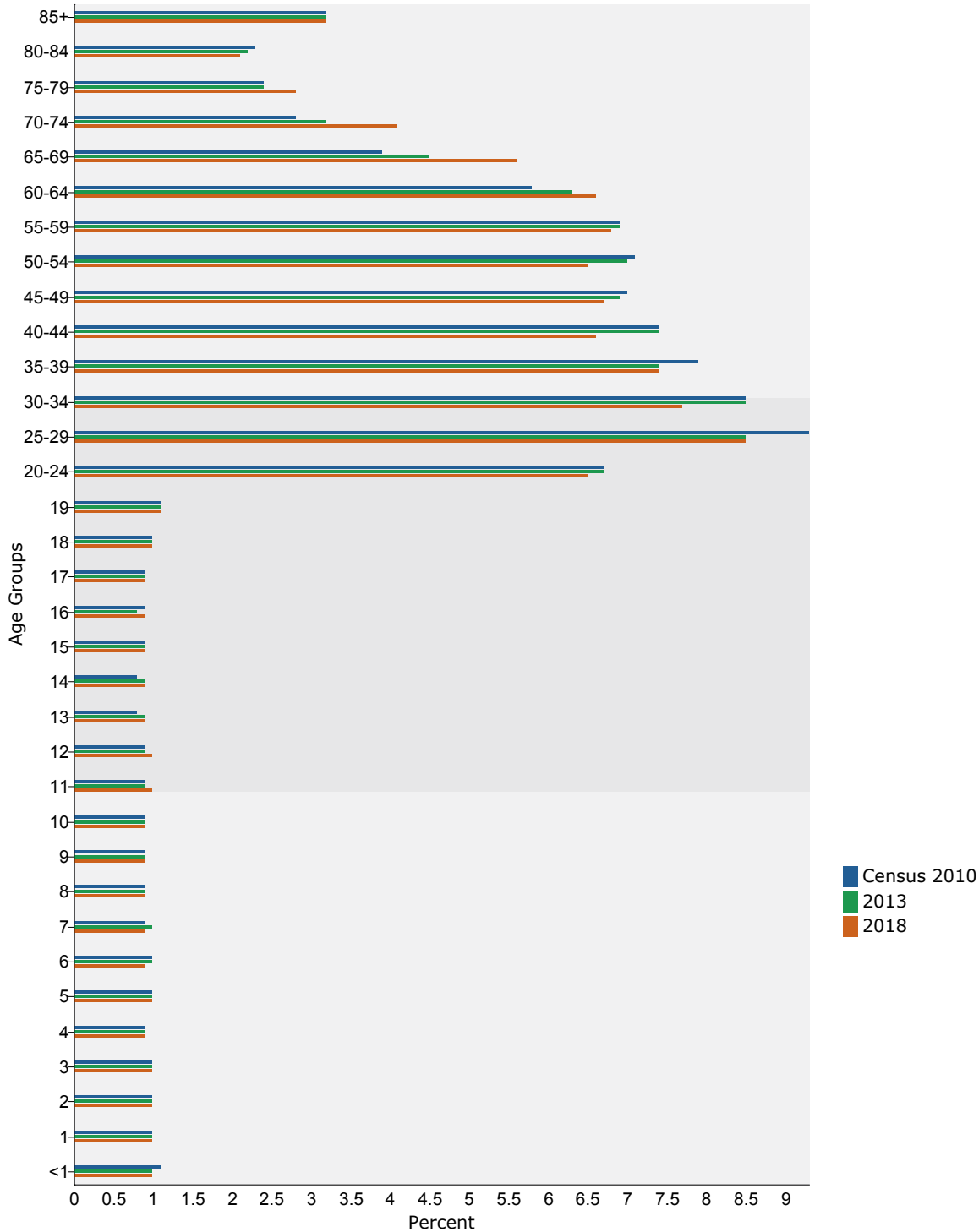
October 29, 2013

Business Summary

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Data for all businesses in area	98117 (SEATTLE, WA), 9810...
Total Businesses:	57,973
Total Employees:	420,266
Total Residential Population:	616,773
Employee/Residential Population Ratio:	0.68

	Businesses		Employees	
by SIC Codes	**Number**	**Percent**	**Number**	**Percent**
Agriculture & Mining	978	1.7%	4,473	1.1%
Construction	3,545	6.1%	18,381	4.4%
Manufacturing	2,200	3.8%	23,679	5.6%
Transportation	1,177	2.0%	12,256	2.9%
Communication	645	1.1%	5,525	1.3%
Utility	81	0.1%	1,835	0.4%
Wholesale Trade	2,785	4.8%	19,196	4.6%
Retail Trade Summary	7,988	13.8%	58,527	13.9%
Home Improvement	303	0.5%	2,817	0.7%
General Merchandise Stores	98	0.2%	2,893	0.7%
Food Stores	889	1.5%	9,437	2.2%
Auto Dealers, Gas Stations, Auto Aftermarket	453	0.8%	4,634	1.1%
Apparel & Accessory Stores	663	1.1%	4,661	1.1%
Furniture & Home Furnishings	680	1.2%	3,336	0.8%
Eating & Drinking Places	2,591	4.5%	18,237	4.3%
Miscellaneous Retail	2,311	4.0%	12,512	3.0%
Finance, Insurance, Real Estate Summary	4,985	8.6%	32,252	7.7%
Banks, Savings & Lending Institutions	694	1.2%	5,766	1.4%
Securities Brokers	429	0.7%	3,643	0.9%
Insurance Carriers & Agents	692	1.2%	8,447	2.0%
Real Estate, Holding, Other Investment Offices	3,170	5.5%	14,396	3.4%
Services Summary	33,069	57.0%	205,018	48.8%
Hotels & Lodging	264	0.5%	7,157	1.7%
Automotive Services	797	1.4%	3,819	0.9%
Motion Pictures & Amusements	1,798	3.1%	9,920	2.4%
Health Services	3,563	6.1%	39,486	9.4%
Legal Services	2,276	3.9%	11,264	2.7%
Education Institutions & Libraries	846	1.5%	16,616	4.0%
Other Services	23,525	40.6%	116,756	27.8%
Government	520	0.9%	39,124	9.3%
Totals	57,973	100%	420,266	100%

October 29, 2013

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	258	0.4%	1,952	0.5%
Mining	26	0.0%	182	0.0%
Utilities	32	0.1%	1,203	0.3%
Construction	3,714	6.4%	19,356	4.6%
Manufacturing	2,096	3.6%	23,030	5.5%
Wholesale Trade	2,768	4.8%	19,051	4.5%
Retail Trade	5,281	9.1%	39,513	9.4%
Motor Vehicle & Parts Dealers	362	0.6%	4,011	1.0%
Furniture & Home Furnishings Stores	328	0.6%	1,479	0.4%
Electronics & Appliance Stores	323	0.6%	1,767	0.4%
Bldg Material & Garden Equipment & Supplies Dealers	296	0.5%	2,785	0.7%
Food & Beverage Stores	823	1.4%	9,646	2.3%
Health & Personal Care Stores	340	0.6%	3,162	0.8%
Gasoline Stations	99	0.2%	772	0.2%
Clothing & Clothing Accessories Stores	855	1.5%	5,374	1.3%
Sport Goods, Hobby, Book, & Music Stores	434	0.7%	2,364	0.6%
General Merchandise Stores	98	0.2%	2,893	0.7%
Miscellaneous Store Retailers	1,129	1.9%	3,970	0.9%
Nonstore Retailers	194	0.3%	1,290	0.3%
Transportation & Warehousing	945	1.6%	10,727	2.6%
Information	1,958	3.4%	14,694	3.5%
Finance & Insurance	2,414	4.2%	19,868	4.7%
Central Bank/Credit Intermediation & Related Activities	696	1.2%	6,112	1.5%
Securities, Commodity Contracts & Other Financial Investments & Other Related Activities	940	1.6%	4,890	1.2%
Insurance Carriers & Related Activities; Funds, Trusts & Other Financial Vehicles	778	1.3%	8,866	2.1%
Real Estate, Rental & Leasing	2,580	4.5%	13,373	3.2%
Professional, Scientific & Tech Services	12,851	22.2%	66,966	15.9%
Legal Services	2,308	4.0%	11,394	2.7%
Management of Companies & Enterprises	127	0.2%	598	0.1%
Administrative & Support & Waste Management & Remediation Services	7,031	12.1%	26,601	6.3%
Educational Services	1,153	2.0%	16,156	3.8%
Health Care & Social Assistance	5,024	8.7%	52,251	12.4%
Arts, Entertainment & Recreation	1,337	2.3%	9,025	2.1%
Accommodation & Food Services	2,859	4.9%	25,732	6.1%
Accommodation	257	0.4%	7,077	1.7%
Food Services & Drinking Places	2,602	4.5%	18,655	4.4%
Other Services (except Public Administration)	4,998	8.6%	21,022	5.0%
Automotive Repair & Maintenance	599	1.0%	2,432	0.6%
Public Administration	521	0.9%	38,966	9.3%
Total	57,973	100%	420,266	100%

October 29, 2013

Tapestry Segmentation Area Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Top Twenty Tapestry Segments

Tapestry descriptions can be found here

| | | Households | | U.S. Households | | |
| | | | Cumulative | | Cumulative | |
Rank	Tapestry Segment	Percent	Percent	Percent	Percent	Index
1	27. Metro Renters	18.5%	18.5%	1.6%	1.6%	1122
2	09. Urban Chic	14.4%	32.9%	1.4%	3.0%	1,026
3	23. Trendsetters	14.3%	47.2%	1.2%	4.2%	1,230
4	08. Laptops and Lattes	5.7%	52.9%	1.0%	5.2%	567
5	03. Connoisseurs	5.1%	58.0%	1.3%	6.5%	402
	Subtotal	**58.0%**		**6.5%**		
6	22. Metropolitans	5.0%	63.0%	1.4%	7.9%	349
7	10. Pleasant-Ville	4.9%	67.9%	1.6%	9.5%	304
8	05. Wealthy Seaboard Suburbs	3.2%	71.1%	1.4%	10.9%	226
9	65. Social Security Set	3.1%	74.2%	0.7%	11.6%	413
10	35. International Marketplace	3.0%	77.2%	1.3%	12.9%	228
	Subtotal	**19.2%**		**6.4%**		
11	36. Old and Newcomers	2.8%	80.0%	2.0%	14.9%	139
12	16. Enterprising Professionals	2.6%	82.6%	1.9%	16.8%	138
13	30. Retirement Communities	2.5%	85.1%	1.6%	18.4%	159
14	01. Top Rung	2.3%	87.4%	0.9%	19.3%	261
15	13. In Style	1.7%	89.1%	2.3%	21.6%	73
	Subtotal	**11.9%**		**8.7%**		
16	20. City Lights	1.6%	90.7%	1.1%	22.7%	149
17	11. Pacific Heights	1.6%	92.3%	0.7%	23.4%	229
18	24. Main Street, USA	1.4%	93.7%	2.2%	25.6%	63
19	39. Young and Restless	1.2%	94.9%	1.5%	27.1%	79
20	44. Urban Melting Pot	1.0%	95.9%	0.7%	27.8%	153
	Subtotal	**6.8%**		**6.2%**		
	Total	**95.8%**		**27.9%**		**344**

Top Ten Tapestry Segments Site vs. U.S.

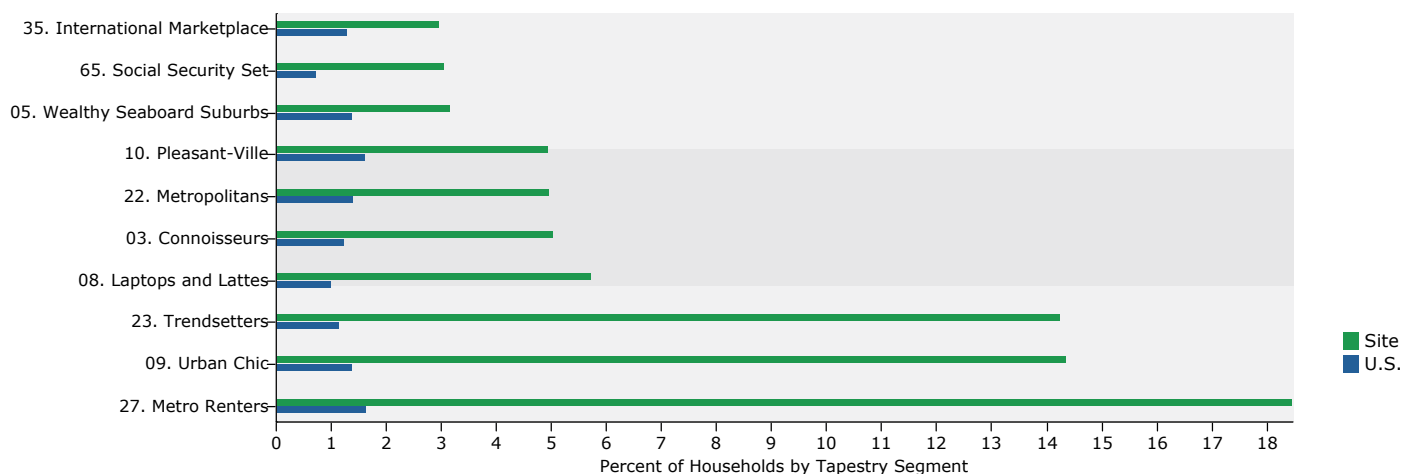Percent of Households by Tapestry Segment

Site
U.S.

October 29, 2013

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

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Tapestry Indexes by Households

Tapestry Indexes by Population

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.
Source: Esri

October 29, 2013

Tapestry Segmentation Area Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Tapestry LifeMode Groups	2013 Households			2013 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	282,841	100.0%		616,773	100.0%	
L1. High Society	**32,743**	**11.6%**	**92**	**86,023**	**13.9%**	**102**
01 Top Rung	6,625	2.3%	261	18,791	3.0%	305
02 Suburban Splendor	1,587	0.6%	33	4,256	0.7%	37
03 Connoisseurs	14,290	5.1%	402	36,703	6.0%	469
04 Boomburbs	503	0.2%	7	1,331	0.2%	8
05 Wealthy Seaboard Suburbs	8,991	3.2%	226	23,100	3.7%	244
06 Sophisticated Squires	747	0.3%	11	1,842	0.3%	11
07 Exurbanites	0	0.0%	0	0	0.0%	0
L2. Upscale Avenues	**71,214**	**25.2%**	**190**	**172,145**	**27.9%**	**213**
09 Urban Chic	40,620	14.4%	1026	94,460	15.3%	1183
10 Pleasant-Ville	13,995	4.9%	304	36,576	5.9%	332
11 Pacific Heights	4,390	1.6%	229	13,765	2.2%	269
13 In Style	4,797	1.7%	73	11,152	1.8%	85
16 Enterprising Professionals	7,412	2.6%	138	16,192	2.6%	157
17 Green Acres	0	0.0%	0	0	0.0%	0
18 Cozy and Comfortable	0	0.0%	0	0	0.0%	0
L3. Metropolis	**19,560**	**6.9%**	**130**	**45,753**	**7.4%**	**142**
20 City Lights	4,480	1.6%	149	11,846	1.9%	175
22 Metropolitans	14,077	5.0%	349	31,393	5.1%	430
45 City Strivers	1,003	0.4%	53	2,514	0.4%	58
51 Metro City Edge	0	0.0%	0	0	0.0%	0
54 Urban Rows	0	0.0%	0	0	0.0%	0
62 Modest Income Homes	0	0.0%	0	0	0.0%	0
L4. Solo Acts	**120,209**	**42.5%**	**579**	**217,568**	**35.3%**	**636**
08 Laptops and Lattes	16,261	5.7%	567	29,343	4.8%	636
23 Trendsetters	40,381	14.3%	1230	84,810	13.8%	1429
27 Metro Renters	52,248	18.5%	1122	80,702	13.1%	1213
36 Old and Newcomers	8,009	2.8%	139	15,807	2.6%	162
39 Young and Restless	3,310	1.2%	79	6,906	1.1%	96
L5. Senior Styles	**16,371**	**5.8%**	**46**	**30,825**	**5.0%**	**47**
14 Prosperous Empty Nesters	518	0.2%	9	1,203	0.2%	10
15 Silver and Gold	0	0.0%	0	0	0.0%	0
29 Rustbelt Retirees	0	0.0%	0	0	0.0%	0
30 Retirement Communities	7,171	2.5%	159	13,469	2.2%	178
43 The Elders	0	0.0%	0	0	0.0%	0
49 Senior Sun Seekers	0	0.0%	0	0	0.0%	0
50 Heartland Communities	0	0.0%	0	0	0.0%	0
57 Simple Living	0	0.0%	0	0	0.0%	0
65 Social Security Set	8,682	3.1%	413	16,153	2.6%	487
L6. Scholars & Patriots	**1,549**	**0.5%**	**34**	**5,180**	**0.8%**	**46**
40 Military Proximity	0	0.0%	0	0	0.0%	0
55 College Towns	738	0.3%	28	2,517	0.4%	46
63 Dorms to Diplomas	811	0.3%	57	2,663	0.4%	64

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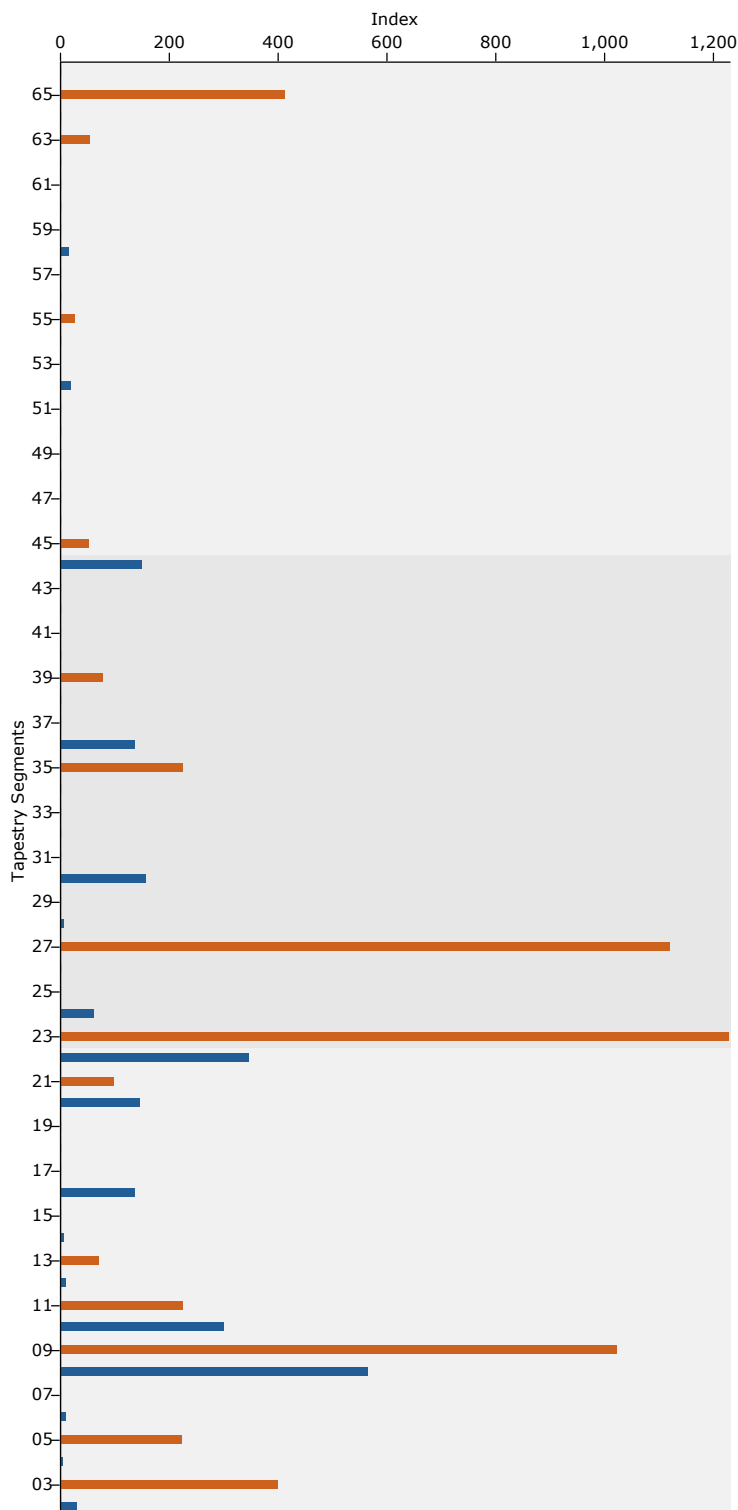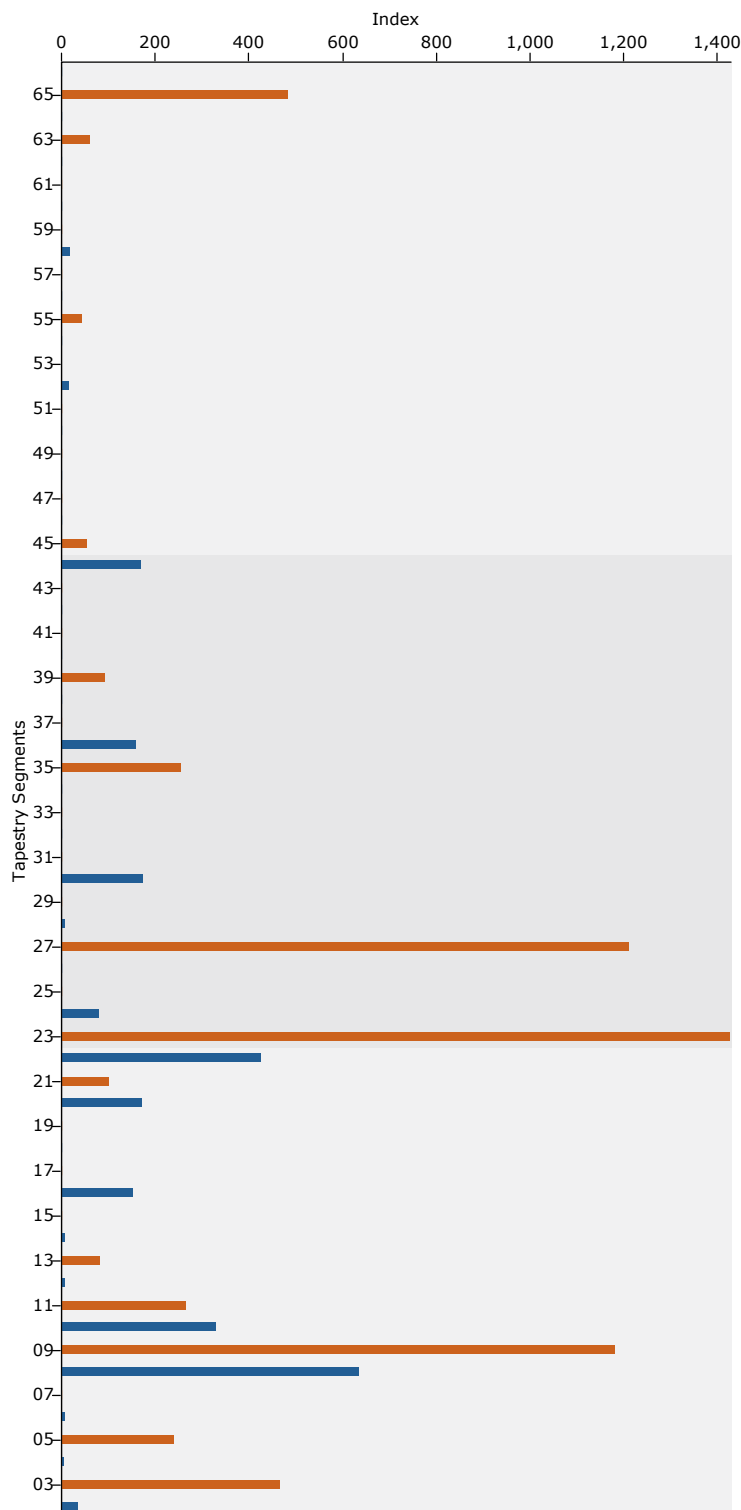**Source:** Esri

October 29, 2013

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Tapestry LifeMode Groups	2013 Households			2013 Population		
	Number	**Percent**	**Index**	**Number**	**Percent**	**Index**
Total:	282,841	100.0%		616,773	100.0%	
L7. High Hopes	**613**	**0.2%**	**5**	**1,439**	**0.2%**	**6**
28 Aspiring Young Families	613	0.2%	9	1,439	0.2%	10
48 Great Expectations	0	0.0%	0	0	0.0%	0
L8. Global Roots	**12,665**	**4.5%**	**54**	**34,659**	**5.6%**	**57**
35 International Marketplace	8,398	3.0%	228	23,967	3.9%	257
38 Industrious Urban Fringe	0	0.0%	0	0	0.0%	0
44 Urban Melting Pot	2,918	1.0%	153	7,453	1.2%	173
47 Las Casas	0	0.0%	0	0	0.0%	0
52 Inner City Tenants	833	0.3%	21	1,621	0.3%	20
58 NeWest Residents	516	0.2%	19	1,618	0.3%	21
60 City Dimensions	0	0.0%	0	0	0.0%	0
61 High Rise Renters	0	0.0%	0	0	0.0%	0
L9. Family Portrait	**3,838**	**1.4%**	**15**	**11,873**	**1.9%**	**18**
12 Up and Coming Families	1,332	0.5%	11	3,572	0.6%	12
19 Milk and Cookies	0	0.0%	0	0	0.0%	0
21 Urban Villages	2,506	0.9%	101	8,301	1.3%	105
59 Southwestern Families	0	0.0%	0	0	0.0%	0
64 City Commons	0	0.0%	0	0	0.0%	0
L10. Traditional Living	**4,011**	**1.4%**	**18**	**11,128**	**1.8%**	**24**
24 Main Street, USA	4,011	1.4%	63	11,128	1.8%	82
32 Rustbelt Traditions	0	0.0%	0	0	0.0%	0
33 Midlife Junction	0	0.0%	0	0	0.0%	0
34 Family Foundations	0	0.0%	0	0	0.0%	0
L11. Factories & Farms	**68**	**0.0%**	**0**	**180**	**0.0%**	**0**
25 Salt of the Earth	0	0.0%	0	0	0.0%	0
37 Prairie Living	0	0.0%	0	0	0.0%	0
42 Southern Satellites	0	0.0%	0	0	0.0%	0
53 Home Town	68	0.0%	2	180	0.0%	2
56 Rural Bypasses	0	0.0%	0	0	0.0%	0
L12. American Quilt	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
26 Midland Crowd	0	0.0%	0	0	0.0%	0
31 Rural Resort Dwellers	0	0.0%	0	0	0.0%	0
41 Crossroads	0	0.0%	0	0	0.0%	0
46 Rooted Rural	0	0.0%	0	0	0.0%	0
66 Unclassified	0	0.0%	0	0	0.0%	0

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Source: Esri

October 29, 2013

Tapestry Segmentation Area Profile

University District - Secondary Trade Area
98117 (SEATTLE, WA), 98107 (SEATTLE, WA) et al.
Geographies: 26 ZIP Codes

Tapestry Urbanization Groups	2013 Households			2013 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	282,841	100.0%		616,773	100.0%	
U1. Principal Urban Centers I	**131,582**	**46.5%**	**553**	**260,187**	**42.2%**	**514**
08 Laptops and Lattes	16,261	5.7%	567	29,343	4.8%	636
11 Pacific Heights	4,390	1.6%	229	13,765	2.2%	269
20 City Lights	4,480	1.6%	149	11,846	1.9%	175
21 Urban Villages	2,506	0.9%	101	8,301	1.3%	105
23 Trendsetters	40,381	14.3%	1230	84,810	13.8%	1429
27 Metro Renters	52,248	18.5%	1122	80,702	13.1%	1213
35 International Marketplace	8,398	3.0%	228	23,967	3.9%	257
44 Urban Melting Pot	2,918	1.0%	153	7,453	1.2%	173
U2. Principal Urban Centers II	**10,201**	**3.6%**	**75**	**20,285**	**3.3%**	**61**
45 City Strivers	1,003	0.4%	53	2,514	0.4%	58
47 Las Casas	0	0.0%	0	0	0.0%	0
54 Urban Rows	0	0.0%	0	0	0.0%	0
58 NeWest Residents	516	0.2%	19	1,618	0.3%	21
61 High Rise Renters	0	0.0%	0	0	0.0%	0
64 City Commons	0	0.0%	0	0	0.0%	0
65 Social Security Set	8,682	3.1%	413	16,153	2.6%	487
U3. Metro Cities I	**106,010**	**37.5%**	**309**	**257,215**	**41.7%**	**342**
01 Top Rung	6,625	2.3%	261	18,791	3.0%	305
03 Connoisseurs	14,290	5.1%	402	36,703	6.0%	469
05 Wealthy Seaboard Suburbs	8,991	3.2%	226	23,100	3.7%	244
09 Urban Chic	40,620	14.4%	1026	94,460	15.3%	1183
10 Pleasant-Ville	13,995	4.9%	304	36,576	5.9%	332
16 Enterprising Professionals	7,412	2.6%	138	16,192	2.6%	157
19 Milk and Cookies	0	0.0%	0	0	0.0%	0
22 Metropolitans	14,077	5.0%	349	31,393	5.1%	430
U4. Metro Cities II	**20,747**	**7.3%**	**66**	**41,905**	**6.8%**	**67**
28 Aspiring Young Families	613	0.2%	9	1,439	0.2%	10
30 Retirement Communities	7,171	2.5%	159	13,469	2.2%	178
34 Family Foundations	0	0.0%	0	0	0.0%	0
36 Old and Newcomers	8,009	2.8%	139	15,807	2.6%	162
39 Young and Restless	3,310	1.2%	79	6,906	1.1%	96
52 Inner City Tenants	833	0.3%	21	1,621	0.3%	20
60 City Dimensions	0	0.0%	0	0	0.0%	0
63 Dorms to Diplomas	811	0.3%	57	2,663	0.4%	64
U5. Urban Outskirts I	**4,514**	**1.6%**	**15**	**12,459**	**2.0%**	**18**
04 Boomburbs	503	0.2%	7	1,331	0.2%	8
24 Main Street, USA	4,011	1.4%	63	11,128	1.8%	82
32 Rustbelt Traditions	0	0.0%	0	0	0.0%	0
38 Industrious Urban Fringe	0	0.0%	0	0	0.0%	0
48 Great Expectations	0	0.0%	0	0	0.0%	0

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October 29, 2013

Tapestry Segmentation Area Profile

University District - Secondary Trade Area
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Geographies: 26 ZIP Codes

Tapestry Urbanization Groups	2013 Households			2013 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	282,841	100.0%		616,773	100.0%	
U6. Urban Outskirts II	**738**	**0.3%**	**5**	**2,517**	**0.4%**	**8**
51 Metro City Edge	0	0.0%	0	0	0.0%	0
55 College Towns	738	0.3%	28	2,517	0.4%	46
57 Simple Living	0	0.0%	0	0	0.0%	0
59 Southwestern Families	0	0.0%	0	0	0.0%	0
62 Modest Income Homes	0	0.0%	0	0	0.0%	0
U7. Suburban Periphery I	**8,981**	**3.2%**	**20**	**22,025**	**3.6%**	**21**
02 Suburban Splendor	1,587	0.6%	33	4,256	0.7%	37
06 Sophisticated Squires	747	0.3%	11	1,842	0.3%	11
07 Exurbanites	0	0.0%	0	0	0.0%	0
12 Up and Coming Families	1,332	0.5%	11	3,572	0.6%	12
13 In Style	4,797	1.7%	73	11,152	1.8%	85
14 Prosperous Empty Nesters	518	0.2%	9	1,203	0.2%	10
15 Silver and Gold	0	0.0%	0	0	0.0%	0
U8. Suburban Periphery II	**68**	**0.0%**	**0**	**180**	**0.0%**	**0**
18 Cozy and Comfortable	0	0.0%	0	0	0.0%	0
29 Rustbelt Retirees	0	0.0%	0	0	0.0%	0
33 Midlife Junction	0	0.0%	0	0	0.0%	0
40 Military Proximity	0	0.0%	0	0	0.0%	0
43 The Elders	0	0.0%	0	0	0.0%	0
53 Home Town	68	0.0%	2	180	0.0%	2
U9. Small Towns	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
41 Crossroads	0	0.0%	0	0	0.0%	0
49 Senior Sun Seekers	0	0.0%	0	0	0.0%	0
50 Heartland Communities	0	0.0%	0	0	0.0%	0
U10. Rural I	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
17 Green Acres	0	0.0%	0	0	0.0%	0
25 Salt of the Earth	0	0.0%	0	0	0.0%	0
26 Midland Crowd	0	0.0%	0	0	0.0%	0
31 Rural Resort Dwellers	0	0.0%	0	0	0.0%	0
U11. Rural II	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
37 Prairie Living	0	0.0%	0	0	0.0%	0
42 Southern Satellites	0	0.0%	0	0	0.0%	0
46 Rooted Rural	0	0.0%	0	0	0.0%	0
56 Rural Bypasses	0	0.0%	0	0	0.0%	0
66 Unclassified	0	0.0%	0	0	0.0%	0

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