

South Lake Union Development Employment Impact

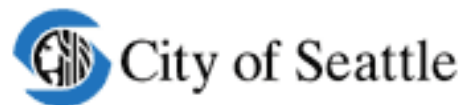
January 2012

Prepared by:



Prepared for:

City of Seattle
Office of Economic Development





*Community Attributes tells data-rich stories
about communities that are important to decision makers.*

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SOUTH LAKE UNION DEVELOPMENT EMPLOYMENT IMPACTS

SUMMARY OF FINDINGS

Community Attributes (CAI) reviewed data and analysis of planned and actual development in the South Lake Union Neighborhood in recent months and past years. This report presents analysis to inform an understanding of SLU development impacts. Subsequent sections present the analysis, methods and data in detail. The key findings from the report are as follows:

- State employment data (covered employment) maintained by the Puget Sound Regional Council, suggest that employment increased in South Lake Union by 4,700 jobs during 2004 to 2008, from 16,600 jobs in 2004 to 21,300 in 2008. From 2008 to 2010, SLU employment declined by 3,000 jobs, partially due to the recession and partially due to displacement from new construction begun during that period.
- Unfortunately for this analysis, March of 2010 is the most recent year for which state covered employment data exist. We know that jobs in South Lake Union have increased significantly since March of 2010, led by Amazon.com moving in and many other commercial developments opening during that period.
- The most significant building development in South Lake Union opened for occupancy during the 18-month period from June 2010 through December 2011. During that time, commercial building space in SLU increased by 1,183,030 square feet from June 2010 to December 2011, according to King County Assessor records.
 - This represents net new development (the amount of new building square footage built during this period *less* the amount of building square footage demolished during the same period).
 - The net new development completed during those 18 months exceeded the net amount completed during the prior seven years (between December 2003 and June 2010), during which time the net increase in commercial square footage was 920,682 square feet.
- Based on net development during the past several years and general assumptions on employment densities, then we would *expect* that total employment increased in SLU by several thousand jobs between March 2010 and December 2011.

- At present, vacancy rates in SLU are low, and overall absorption of new office space has been high over the past 18 months, as reported by commercial real estate agents that represent office space in the neighborhood.
- If all recent development is absorbed at typical employment densities and vacancy rates reported by local real estate professionals, then we would expect net job increase of up to 7,000 jobs between March 2010 and the end of 2011.
 - This number may be lower if, in fact, large companies such as Amazon.com have controlled large amounts of space without moving employees in (or if they have significantly more square feet per employee than average).
 - This estimate reflects our development-driven estimates through the end of 2011 and state employment estimates from 2003 through March of 2010.
 - We will not know this number with better certainty until more recent State employment data are mapped and released. State employment data maintained by the PSRC would reflect this increase in the March of 2012 data that the PSRC maintains, to be released in mid-2013.
- Studies completed in 2004 and 2010 for the City of Seattle Office of Economic Development (OED) estimated employment growth associated with new real estate development in South Lake Union.
 - The studies did not attempt to estimate *net* job growth. In other words, as stated in their reports, they did not account for demolished buildings and the resulting net loss in employment resulting from displaced or closed businesses.
 - CAI attempted to produce employment estimates directly comparable to the 2004 to 2010 period, using comparable methods and accounting for displacement of buildings. Availability of assessors' data, however, dictated that the analysis in this report change the base year to 2003 rather than 2004 as in the prior studies.

Finally, this analysis focuses entirely on the South Lake Union boundaries. From a citywide perspective of net impacts, a full appreciation of the South Lake Union plan would need to consider (1) where companies moved that were displaced by plan implementation, and whether their displacement was inevitable regardless of the plan; and (2) whether the job growth would have occurred elsewhere in the city, were it not for the plan; or whether there would have been risk of losing major employers to other cities were it not for the plan, possibly to cities outside of the region or state. This analysis does not address those considerations.

INTRODUCTION

In the last decade, planning and development transformed Seattle's South Lake Union (SLU) neighborhood. New high rises are home to condominiums, apartments, offices, retail shops and other land uses. New development and absorption of commercial building space continues to change the nature of the neighborhood. On August 27, 2011, the Seattle Times published an article praising overall job growth resulting from development in SLU. Subsequently, other media outlets cited discrepancies between estimates of net job change in SLU provided by Puget Sound Regional Council (PSRC) and estimates from reports funded by Seattle's Office of Economic Development (Sommers et al). The City desires a third party review of the data sources and methods used by these articles and reports to verify employment numbers directly with employers in the area.

PRIOR ESTIMATES OF IMPACTS

SLU Development Update 2004-2010 Report

In March of 2011, the City of Seattle Office of Economic Development released a report titled "South Lake Union Development Update: 2004-2010." The report begins by summarizing development square footage and job growth estimates for South Lake Union produced in 2004 by Paul Sommers. It then provides updated estimates of employment and building square footage for 2010. The employment estimates from 2004 and 2010 are derived from the aforementioned building square footages. The key findings of the report are as follows:

- In 2004 Heartland, LLC estimated that 7.2 million square feet of building space could be developed in SLU by 2020 (**Exhibit 1**). This was an estimate of gross new development and did not account for demolished building space.
- The original 2004 analysis framed estimates into the phases and scenarios provided in **Exhibit 1**. A total of 2.21 million square feet of building space was estimated to be developed from 2004 to 2007 and 4.99 million square feet from 2008 to 2020, a total of 7.2 million square feet.

**Exhibit 1. Build-out Phases and Scenarios (1,000's s.f.),
2004-2020**

	Full Build-out			Partial Build-out	
	Phase 1 (2004-2007)	Phase 2 (2008-2020)	Total	Phase 3 (2008-2020)	Total
Commercial Use					
Biotech	1,382	1,138	2,520	569	1,951
Office	708	3,252	3,960	1,626	2,334
Retail/Hotel	120	600	720	300	420
Commercial Sub-Total	2,210	4,990	7,200	2,495	4,705

Source: SLU Development Update (2010)

- The original 2004 estimated that, depending on the build-out scenario, between 15,000 and 23,000 jobs would move into the neighborhood by 2020 (**Exhibit 2**). This was an estimate of gross new jobs and did not account for displaced jobs or jobs naturally leaving the area.

Exhibit 2. SLU Planning Employment Estimates, 2004-2020

	Full Build-out			Partial Build-out	
	Phase 1	Phase 2	Total	Phase 2	Total
Biotech	3,159	3,141	6,300	1,571	4,730
Office	2,518	12,213	14,731	6,107	8,625
Retail/Hotel	732	1,946	2,678	973	1,705
Total Permanent Jobs	6,409	17,300	23,709	8,651	15,060

Source: SLU Development Update (2010).

- New employment estimates were completed in 2010 based on the previously described Phase One timeline (2004 to 2007) and the first three years of the Phase Two timeline (2008 to 2010). The sum of development square footage within both of the time frames (2004-2010) is shown in **Exhibit 3**.
- The 2004 estimates projected that under a full build-out scenario 3,361,283 square feet of commercial building space would be developed from 2004 to 2010. The 2010 updated development figures, based on actual development square footages, show that 4,253,909 square feet of new commercial building space was developed in SLU from 2004 to 2010. According to the report, actual development exceeded the pace of development originally estimated by Dr. Paul Sommers at Seattle University and Heartland, LLC in 2004.

Exhibit 3. SLU Development Update Development Projections (s.f.), 2004-2010

	Full Build-out	Partial Build-out	Actual
Biotech	1,644,695	1,513,388	1,784,808
Office	1,458,262	1,083,031	2,211,422
Retail	258,327	189,096	257,679
Total Commercial	3,361,283	2,785,514	4,253,909

Source: SLU Development Update (2010)

- According to the report, development between 2004 and 2010 resulted in the creation 13,637 new jobs in SLU, thus outpacing all 2004 employment estimates for this time frame. **Exhibit 4** shows the partial and full build-out employment estimates from 2004 and compares them to new employment estimates calculated in 2010. According to the SLU Development Update Report office space outpaced all other categories in terms of overall employment totaling 8,226 jobs from 2004 to 2010. Biotech was the second largest category at 4,462 jobs.

Exhibit 4. SLU Development Update Employment Estimates, 2004-2010

Actual Jobs vs. Projected During 2004-2010			
	Full Build-out	Partial Build-out	Actual
Biotech	4,112	3,783	4,462
Office	5,425	4,029	8,226
Retail	961	703	959
Total	10,497	8,516	13,647

Source: SLU Development Update (2010)

Recent Articles and Discrepancies

In August of 2011 an editorial article was published in the Seattle Times addressing job growth estimates for the South Lake Union Neighborhood. In general, the article was a positive reflection on overall job growth in SLU and made the following assertions regarding the transformation of the neighborhood:

- *In terms of jobs, it has worked spectacularly. It's exceeding even the optimistic claims made years ago...*
- *By the close of 2010, the Vulcan-developed "Allentown" area was judged to be home, already, to 14,000 jobs. That's 30 percent more than Sommers had projected by this time under his rosiest scenario.*

- *New estimates are low and include only 3,200 jobs for Amazon. Amazon hasn't said how many workers it has at its new headquarters, but based on square footage it's believed to be at least 6,000 by now and on its way to 10,000.*
- *The company (Amazon) is on fire, and had it not decided to move in, Allentown would probably be home to about 10,000 jobs — about on the pace predicted.*

In contrast, the Seattle Displacement Coalition distributed a column in September 2011 titled “Job Growth in South Lake Union Exaggerated.” Generally, the article criticized job growth estimates published in the 2010 SLU Development Update produced for the City of Seattle OED. The article included the following assertions:

- *Over the decade... we actually saw an overall drop in employment, with a paltry gain of 548 jobs between 2004 and 2010.*
- *(The estimates) Failed to subtract the number of jobs lost over the same period, mostly blue-collar jobs with the warehouses, shops, light industry, retail, low-income housing and other longtime uses removed often as a direct result of Vulcan's redevelopment.*
- *Mann and Sommers also expanded their area of study beyond the boundaries of how SLU is normally defined to include new developments not truly in the neighborhood at all.*
- *(The estimates) Failed to take into account vacancy rates in those new developments running as high as 40 percent over their period of study.*
- *A significant portion of new jobs in SLU are simply jobs that have relocated from other parts of the city —including the relocation of more than 2,000 Amazon jobs from Beacon Hill and downtown.*

Current Covered Employment Estimate

Employment estimates are also generated utilizing the Quarterly Census of Employment and Wages (QCEW) data, which represents all covered employees. This source is made up of administrative records employers are required to report to the Washington State Employment Security Department. This data can be accessed through the Puget Sound Regional Council (PSRC), which utilizes the data in its employment growth forecasts. This is the same data source discussed in the article presented by the Seattle Displacement Coalition. **Exhibit 5** contains 1995 through 2010 employment estimates for SLU by sector. Each column represents the total number of covered employees in March of that year. According to the 2010 QCEW Data, there were 16,633 jobs in SLU in 2004 and 18,233 jobs in 2010, a net increase of 1,600 jobs. In general, the QCEW data reflects substantial employment fluctuations over the last fifteen years with major gains and losses occurring during the time period.

Exhibit 5. PSRC South Lake Union RGC Employment Estimates, 1995-2010 (March)

PSRC Jobs Estimates 1995-2010					
Sector	1995	2000	2004	2008	2010
Construction/Resource	847	2,019	849	2,333	1,408
Finance, Real Estate & Leasing	1,683	2,133	1,967	1,473	1,174
Manufacturing	1,985	1,966	1,335	1,150	449
Retail	690	1,394	860	883	712
Services	6,310	11,416	10,224	14,481	13,479
Wholesale, Transportation & Utilities	2,355	1,797	937	839	831
Government	700	404	461	152	180
Total	14,570	21,129	16,633	21,311	18,233
Total Jobs Gained 2004-2010					1,600

Source: PSRC Covered Employment Estimates, South Lake Union RGC, (2011)

A closer look reveals where job gains and losses occurred by sector from 2004 to 2010. Although this data shows an increase in overall employment, several industries experienced significant losses. **Exhibit 6** illustrates these losses and gains.

Exhibit 6. PSRC South Lake Union RGC Employment Net Change 2004-2010 (March)

PSRC 2004-2010 Net Change in Employment	
Sector	Net 2004-2010
Construction/Resource	559
Finance, Real Estate & Leasing	-793
Manufacturing	-886
Retail	-148
Services	3,255
Wholesale, Transportation & Utilities	-106
Government	-281
Total	1,600

Source: PSRC Covered Employment Estimates (unscaled), South Lake Union RGC, (2012)

Significant drops in employment occurred in the Manufacturing Sector, which lost a total of 886 jobs from 2004 through 2010. The Finance, Real Estate and Leasing Sectors also experienced substantial drops in employment as well, resulting in a loss of 793 jobs. Alternatively, employment increased by 559 in the Construction/Resource Sector and

3,255 in the Services Sectors. The Services Sector includes jobs in the following industries:

- Information, Professional, Scientific and Technical Services
- Management of Companies and Enterprises
- Administrative and Support and Waste Management and Remediation Services
- Educational Services
- Health Care and Social Assistance
- Arts, Entertainment and Recreation
- Accommodation and Food Services
- Other Services (except Public Administration)

REVIEW OF METHODS

The following section summarizes the methods used to produce employment estimates for SLU, including the previously discussed QCEW data (covered employees) and the methods used in the SLU Development Update.

SLU Development Update 2004-2010 Report

The 2010 employment estimates from the SLU Development Update are based on actual development square footages within SLU. These square footages are organized under three categories: Office, Biotech and Retail/Hotel and, according to the report, represent net rentable square feet. The geographic area that is analyzed is derived from the City of Seattle designated SLU Urban Village Overlay, show in **Exhibit 7**. This area is bounded by Denny Way to the South, Interstate 5 to the east, Aurora Ave to the west and Lake Union along its northern edge. To provide consistency, this geographic boundary is used in further analysis provided later in this report.

Exhibit 7. South Lake Union Neighborhood Boundaries

South Lake Union Jobs Estimate - Third Party Review
South Lake Union Urban Village Overlay

DISCUSSION DRAFT



Employment estimates within the SLU Development Update are only completed for direct employment and do not include potential indirect employment growth. These estimates utilize the same assumptions developed by Paul Sommers in his 2004 study. They are based on an assumed number of employees per thousand square feet of development. **Exhibit 8** summarizes the assumptions used in the report for estimating employment in SLU.

**Exhibit 8. SLU Development Update
Employees per 1,000 s.f. of Building Space**

Type	Assumption
Office	3.72 employees per 1000 s.f.
Retail	3.72 employees per 1000 s.f.
Biotech	2.5 employees per 1000 s.f.

Source: SLU Development Update, (2010)

Seattle Displacement Coalition

The article distributed by the Seattle Displacement Coalition utilizes QCEW (covered employees) data from the Washington State Employment Security Department, which is provided by the PSRC. As previously described, this data provides total employment within SLU by sector. The employment number is a net total and includes job losses and gains.

Seattle Times Article

The Seattle Times Article references the SLU Development Update estimates and the methods and approach associated with that report. Claims that employment is even higher than estimated within the SLU Development Update are based on recent growth by Amazon during 2011, which is not accounted for in the SLU Development Update.

Limitations to Methods

SLU Development Update Approach

The method used for the SLU Development Update focuses on estimating new employment resulting directly from new development. This method does not reflect total employment in SLU nor does it reflect net employment growth. An estimate of total employment would also factor in net losses in employment and provide a more complete picture of overall employment and employment growth within the neighborhood. Employment growth estimates cited in the report are only representative of new jobs but do not represent existing employers that left the

neighborhood during the same time period. This is a key distinction when analyzing the report's estimates.

The following additional inputs and considerations would enhance this method and are included in the **Reframed Employment Estimate** section of this report:

- As previously mentioned, base the employment estimate on total building square footage within SLU, thereby accounting for new building square footage and demolished building square footage.
- Factoring in vacancy rates, which vary greatly within a neighborhood over time, will more precisely determine the number of employees expected in a given space.
- Jobs per thousand square feet assumptions should vary based on the type of building use. Warehouse and storage uses in particular account for fewer jobs per thousand square feet than office or retail uses.

Seattle Displacement Coalition Approach

Assertions by the Seattle Displacement Coalition are based on QCEW data, available upon request through the PSRC. As previously described, the data represents total covered employees within SLU by sector and year. Net growth can be calculated by comparing year over year totals. The Seattle Displacement coalition claims that 548 jobs were gained from 2004 to 2010 in SLU, which is substantially lower than the 1,600 jobs reported in the recently obtained QCEW data provided under the **Current Covered Employment Estimate** section of this report. The discrepancy between the Seattle Displacement Coalition QCEW data and the QCEW provided earlier in this report results from the use of different time periods. The Displacement Coalition compared 2003 and 2010 data, citing 2003 data from the 2009 Puget Sound Trends report published by the PSRC (**Exhibit 9**). To be clear, the QCEW numbers provided earlier in this report represent 2004 and 2010 data.

Exhibit 9. Seattle Displacement Coalition Estimate, 2003-2010

PSRC Estimates -Seattle Displacement Coalition Time Period			
Year	2003	2010	Net Change
Employment	17,685	18,233	548

Source: PSRC Covered Employment Estimates (unscaled), South Lake Union RGC, (2012).

QCEW/PSRC Data Approach

QCEW data provides a method for estimating employment growth that is based on actual state compiled covered employee data. The data selection is based on the geography of the PSRC designated SLU Regional Growth Center, which has the same boundaries as the City of Seattle SLU Urban Village Overlay boundary. The QCEW data represents employment in March of each year and is based on “*employment for those firms, organizations and individuals whose employees are covered by the Washington Unemployment Insurance Act. Covered employment excludes self-employed workers, proprietors, CEOs, etc., and other non-insured workers. Typically, covered employment has represented 85-90% of total employment. Note that this includes part-time and temporary employment, and if a worker holds more than one job, each job would appear in the database.*” (Source: PSRC 2011) The data is tabulated based on each business’ location which allows for accurate compilation of overall employment data within a specific geography.

By analyzing yearly totals provided through this data one can extrapolate net changes in employment, or employment growth. This method does not account for movement of existing employees from one location in Seattle to another. Additionally, it does not provide a complete picture of job displacement, wherein existing jobs are replaced by new development. This is due to the difficulty in distinguishing job losses resulting from displacement by new development versus job losses resulting from business closures. Additionally, the most recent QCEW data represents employment in March of 2010 before Amazon and several other businesses established themselves in the neighborhood. When 2011 data is made available it will capture much of this growth, but will not represent all growth in 2011 as it will only capture employment through March of 2011.

RECOMMENDATIONS

The following recommendations improve upon preceding methods to provide a more accurate estimate of overall job growth in SLU.

- Reframe the estimates provided in the SLU Development Update Report so that they more accurately represent total employment in SLU. The estimates from the SLU Development Update only represent new jobs associated with new development, not total employment and net employment growth.
- Utilize and track up-to-date QCEW employment data available through the PSRC. Estimates for 2011 will be available in June 2012 and will more accurately reflect current employment in SLU by including recent growth at the Amazon campus.
- Clearly define the intended study area. If the study area is defined by the boundaries of the SLU Urban Village Overlay, then these

boundaries should be consistently used in the future in order to accurately measure job growth over time.

- Consider job migration within Seattle and King County. None of the methods used in this report account for job migration within the City of Seattle or King County. These moves may not result in net new jobs within a municipality, but present major impacts at the neighborhood level.

REFRAMED EMPLOYMENT ESTIMATE

The following is a revised employment estimate for SLU based on building square footages (based on the recommendation from the previous section of this report). This is similar to the method utilized in the SLU Development Update report but is accomplished using an alternate method to calculate development square footage. In this reframed analysis, the *net* change in building square footage is analyzed, thereby accounting for employment gains *and* losses resulting from existing business displacement and closures. The geographic boundary of SLU used in this reframed estimate is consistent with the City's SLU neighborhood definition displayed in **Exhibit 7**.

Alternate Method

In this alternate method, net building square footages are used in order to accurately reflect usable space and rentable square footages. Building square footage totals are based on King County Assessor data for December 2003, June 2010 and December 2011 (it is important to note that assessor data from 2003 was utilized rather than 2004 due to its availability). Building square footages for each year are available on a parcel by parcel basis and are categorized by use. Net increases from 2003 to 2010 and from 2010 to 2011 are then calculated. In addition, vacancy rates based on data from each time period are factored into the estimate to more accurately reflect building occupancies.

The total building square footages from 2003, 2010 and 2011 are then used to calculate overall employment in the neighborhood. Assumptions similar to those utilized in the SLU Development Update are utilized to calculate overall employment by commercial use category, but with additional categories.

Results

Exhibit 10 illustrates the net building square footage in SLU in 2003, 2010 and 2011. The data represents the net rentable square footage of the neighborhood. The reframed employment estimates are derived from these totals, which are divided into six categories: Retail/Accommodation, Office, Biotech/Medical, Industrial, Storage/Warehouse and Civic. Office buildings are the most common commercial building type in SLU and

were developed at a higher rate than any other commercial building type, increasing by 920,862 square feet from 2003 to 2010 and 1,183,030 square feet from 2010 to 2011.

Exhibit 10. SLU Net Building s.f., 2003-2010

Category	2003	2010	2011	2003-2010	2010-2011
				Net Change	Net Change
Retail/Accommodation	1,687,819	1,681,675	1,720,793	(6,144)	39,118
Office	3,022,417	4,142,978	5,580,464	1,120,561	1,437,486
Biotech/Medical	293,153	1,475,454	1,311,332	1,182,301	(164,122)
Industrial	986,084	417,062	340,187	(569,022)	(76,875)
Storage/Warehouse	1,661,932	878,888	826,311	(783,044)	(52,577)
Civic	228,217	204,427	204,427	(23,790)	-
Total	7,879,622	8,800,484	9,983,514	920,862	1,183,030

Source: King County Assessor, (2011) Community Attributes Inc., (2012)

The assumptions used in determining overall employment are shown in **Exhibit 11**. Greater densities of employment are assumed for office and retail service uses, both set at 3.72 per 1,000 net square feet of building. This is the same assumption used in the SLU Development Update Report. Lower employment densities are assumed for Biotech/Medical, Industrial, Storage/Warehouse and Civic uses.

Exhibit 11. Reframed Analysis Employees per 1,000 s.f. of Building Space

Category	Employees per 1000 s.f.
Retail/Accommodation	3.72
Office	3.72
Biotech/Medical	2.5
Industrial	2.31
Storage/Warehouse	1.28
Civic	2

Source: Institute of Transportation Engineers, 2003, SLU Development Update, (2010)

The reframed employment estimate for SLU is shown in **Exhibit 12**. Based on the reframed method, overall employment in SLU went from 18,510 in 2003 to 23,863 in 2010, a net increase of 5,353 employees.

Exhibit 12. Reframed Employment Estimate, 2003-2011

Category	2003	2010	2011	2003-2010	2010-2011
				Net Change	Net Change
Retail/Accommodation	6,279	6,256	6,401	(23)	146
Office	11,243	15,412	20,759	4,168	5,347
Biotech/Medical	733	3,689	3,278	2,956	(410)
Industrial	2,278	963	786	(1,314)	(178)
Storage/Warehouse	2,127	1,125	1,058	(1,002)	(67)
Civic	456	409	409	(48)	-
Total	18,510	23,863	29,214	5,353	5,351

Source: King County Assessor, (2011), Community Attributes, (2012).

The results of the reframed estimate indicate that employment growth from 2003 to 2010 was substantial in SLU. Office uses and biotech/medical uses comprise the majority of new employment, while significant losses occurred in industrial and storage/warehouse uses. From 2003 to 2010, office employment increased from 11,243 to 15,412 employees, an increase of 4,168. In the same time period, Industrial uses decreased by 1,314 employees and Storage/Warehouse uses decreased by 1,002 employees.

Exhibit 12 also provides estimates from 2010 to 2011. From 2010 to 2011, the same timeframe in which Amazon moved a significant number of employees to its SLU campus, overall employment grew from 23,863 to 29,214, a net increase of 5,351 employees. Office uses accounted for almost all of the increase totaling 5,347 new jobs. Losses took place in biotech/medical, industrial and storage/warehouse categories in the same time period. More detailed breakdowns of reframed employment estimates for both time periods are provided under **Appendix A**.

For comparison, **Exhibit 13** provides the various employment estimates completed for the SLU previously analyzed in this report. Each estimate listed represent a different method and approach to analyzing employment in SLU.

Exhibit 13. Employment Estimate Comparison, 2003-2010

Estimate	Employment Growth Estimate
Sommers Analysis, 2004	10,497
SLU Development Update, 2004-2010	13,647
QCEW Data (Covered Employees)	1,600
Reframed Estimate*	5,353

*Based on 2003 and 2010 assessor data

Source: Community Attributes Inc., (2012)

APPENDIX A.

Exhibit A1. SLU Net Square Footage Employee Generating Uses, 2003-2011

Employment Generating Uses (Net s.f.)				
Use	2003	2010	2011	Category
410 AUTOMOTIVE CENTER (410)	-	100,616	100,616	Retail/Accommodation
498 BROADCAST FACILITIES (498)	-	155,272	155,272	Office
309 CHURCH (309)	48,855	48,855	48,855	Civic
308 CHURCH WITH SUNDAY SCHOOL (308)	14,522	14,522	14,522	Civic
311 CLUBHOUSE (311)	3,947	2,550	2,550	Retail/Accommodation
845 CONDO, OFFICE (845)	-	8,063	8,063	Office
846 CONDO, RETAIL (846)	-	1,509	1,509	Retail/Accommodation
419 CONVENIENCE MARKET (419)	1,596	1,596	-	Retail/Accommodation
482 CONVENTION CENTER (482)	50,000	50,000	50,000	Civic
426 DAY CARE CENTER (426)	-	14,666	64,666	Retail/Accommodation
319 DISCOUNT STORE (319)	9,720	6,480	6,480	Retail/Accommodation
365 ELEMENTARY SCHOOL (ENTIRE) (365)	47,460	19,880	19,880	Civic
528 GARAGE, SERVICE REPAIR (528)	294,338	228,502	201,510	Retail/Accommodation
326 GARAGE, STORAGE (326)	86,426	50,634	50,634	Storage/Warehouse
491 GOVERNMENT COMMUNITY SERVICE BUILDING (491)	-	3,790	3,790	Civic
841 HOTEL, FULL SERVICE (841)	153,315	153,315	153,315	Retail/Accommodation
332 HOTEL, LIMITED (332)	511,767	577,816	577,816	Retail/Accommodation
494 INDUSTRIAL LIGHT MANUFACTURING (494)	986,084	417,062	340,187	Industrial
496 LABORATORIES (496)	164,246	1,322,854	1,158,732	Biotech/Medical
341 MEDICAL OFFICE (341)	128,907	152,600	152,600	Biotech/Medical
525 MINI WAREHOUSE, HI-RISE (525)	124,330	90,968	90,968	Storage/Warehouse
344 OFFICE BUILDING (344)	2,913,989	3,505,007	4,830,409	Office
820 OPEN OFFICE (820)	-	370,162	482,246	Office
350 RESTAURANT, TABLE SERVICE (350)	122,175	105,152	124,841	Retail/Accommodation
353 RETAIL STORE (353)	562,853	458,265	456,282	Retail/Accommodation
406 STORAGE WAREHOUSE (406)	1,224,980	617,298	564,721	Storage/Warehouse
379 THEATER, LIVE STAGE (379)	67,380	67,380	67,380	Civic
458 WAREHOUSE DISCOUNT STORE (458)	26,540	7,200	7,200	Retail/Accommodation
810 WAREHOUSE OFFICE (810)	108,428	104,474	104,474	Office
534 WAREHOUSE SHOWROOM STORE (534)	1,568	24,008	24,008	Retail/Accommodation
407 WAREHOUSE, DISTRIBUTION (407)	226,196	119,988	119,988	Storage/Warehouse
Total	7,879,622	8,800,484	9,983,514	

Source: King County Assessor, (2011) Community Attributes, (2012)

Exhibit A2. SLU Employment *Reframed* Estimate 2003, 2010 and 2011, by Use

Employment Generating Uses (Jobs with Vacancy)			
Use	2003	2010	2011
410 AUTOMOTIVE CENTER (410)	-	321	334
498 BROADCAST FACILITIES (498)	-	495	516
309 CHURCH (309)	78	84	87
308 CHURCH WITH SUNDAY SCHOOL (308)	23	25	26
311 CLUBHOUSE (311)	12	8	8
845 CONDO, OFFICE (845)	-	26	27
846 CONDO, RETAIL (846)	-	5	5
419 CONVENIENCE MARKET (419)	5	5	-
482 CONVENTION CENTER (482)	80	86	89
426 DAY CARE CENTER (426)	-	47	215
319 DISCOUNT STORE (319)	29	21	22
365 ELEMENTARY SCHOOL (ENTIRE) (365)	76	34	36
528 GARAGE, SERVICE REPAIR (528)	877	728	670
326 GARAGE, STORAGE (326)	89	56	58
491 GOVERNMENT COMMUNITY SERVICE BUILDING (491)	-	6	7
841 HOTEL, FULL SERVICE (841)	457	489	510
332 HOTEL, LIMITED (332)	1,524	1,842	1,921
494 INDUSTRIAL LIGHT MANUFACTURING (494)	1,824	825	702
496 LABORATORIES (496)	329	2,833	2,589
341 MEDICAL OFFICE (341)	258	327	341
525 MINI WAREHOUSE, HI-RISE (525)	127	100	104
344 OFFICE BUILDING (344)	8,680	11,171	16,058
820 OPEN OFFICE (820)	-	1,180	1,603
350 RESTAURANT, TABLE SERVICE (350)	364	335	415
353 RETAIL STORE (353)	1,677	1,461	1,517
406 STORAGE WAREHOUSE (406)	1,256	677	646
379 THEATER, LIVE STAGE (379)	108	115	120
458 WAREHOUSE DISCOUNT STORE (458)	79	23	24
810 WAREHOUSE OFFICE (810)	323	333	347
534 WAREHOUSE SHOWROOM STORE (534)	5	77	80
407 WAREHOUSE, DISTRIBUTION (407)	232	132	137
Total	18,510	23,863	29,214

Source: King County Assessor, (2011) Community Attributes, (2012)

Exhibit A3. Employee Generating Uses SLU. 2003-2011

Cushman Wakefield 2003,2010, 2011

	Q1 2003	Q2 2003	Q3 2003	Q4 2003	Q1 2010	Q2 2010	Q3 2010	Q4 2010	1Q 2011	2Q 2011	3Q 2011
Lower Queen											
Anne/Lake	20.10%	21.40%	19.50%	18.70%	15.30%	14.10%	13.80%	14.10%	12.50%	12.90%	16.40%

Washington State CPS Report 2010

	2004	2005	2006	2007	2008	Q2 2009	Q3 2009	Q4 2009	Q1 2010	Q2 2010
Lake Union	9.26%	13.35	4.57	7.9	8.95	10.23	17.07	17.57	17.45	15.96

CB Richard Ellis Puget Sound Office Report 2003, 2010, 2011

	Q4 2003	Q3 2010	Q4 2010	Q1 2011	Q2 2011	Q3 2011
Lake Union	23.43%	9.86%	7.46%	9.23%	11.37%	11.31%

Source: Cushman Wakefield, Washington State CPS Report, CB Richard Ellis, (2011)

Exhibit A4. Employee Generating Uses SLU

Land Use	Employee Per 1,000 Sq Ft
Commercial / Shopping Ctr (820)	
25K gross leasable area	3.33
50K gross leasable area	2.86
100K gross leasable area	2.5
200K gross leasable area	2.22
400K gross leasable area	2
General Office (710)	
10K gross floor area	4.48
25K gross floor area	4.14
50K gross floor area	3.91
100K gross floor area	3.7
Institutional	
Government Office Building (730)	5.77
Day Care Center (565)	2.54
School (Averaged)	0.76
Industrial	
Business Park (770)***	3.16
Mini-Warehouse (151)	0.04
Light Industrial (110)	2.31
Warehousing (150)	1.28
Manufacturing (140)	1.79

Source: Trip Generation, Institute of Transportation Engineers, (2003)