

# Food Life Nexus

## PDA Executive Council Discussion

August 23, 2023



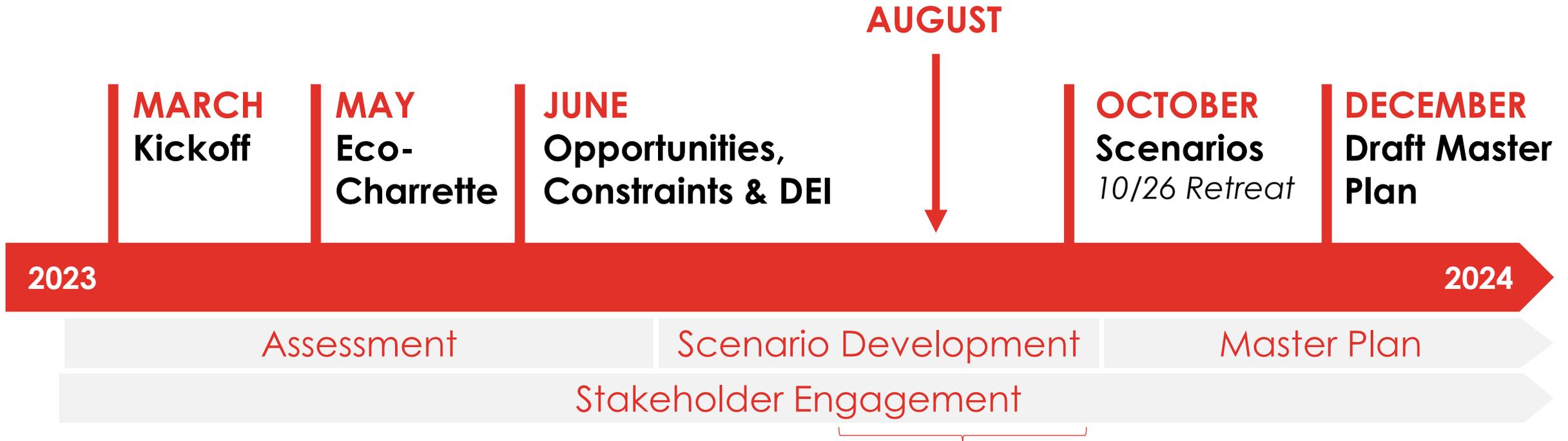
# Today's Agenda

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



**Where We Are**

# Master Plan Timeline



## Council work sessions :

- ✓ Social Services & Community Steward
- **Food Life Strategies (today)**
- DEI Framework
- Sustainability Action Plan + Physical Strategies
- Emerging Themes + Downtown Anchor

# Why We're Discussing Food Life

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

## Macro Trends & Case Studies (MRA):

- Rise of online delivery, food halls, and interest in regional/sustainable cuisine
- Decline in farmers due to economics, workforce, climate challenges

## Tenant & Other Interviews (BERK):

- "More programming around food, like festivals/night market, can attract more visitors, especially at night."
- "Great place to shop for specialty goods and discover the joy of cooking. It began as a way to keep that affordable. Don't lose this!"

## Analysis of PPM Data (HR&A):

- 43% of all PDA revenues come from Restaurant, Food, or Farmers

## Physical Analysis (Mithun):

- Physical constraints and opportunities for food life

## PDA Council Opportunities & Constraints Workshop + Food Life Discussions

- Competing with grocery stores and supporting farmers
- Creating evening destination for locals
- PPM's food offerings as a reflection of multi-cultural diversity
- Desire for greater synergies between food life & farmers/other retail

**Emerging theme of food life as a core focus**

## TODAY:

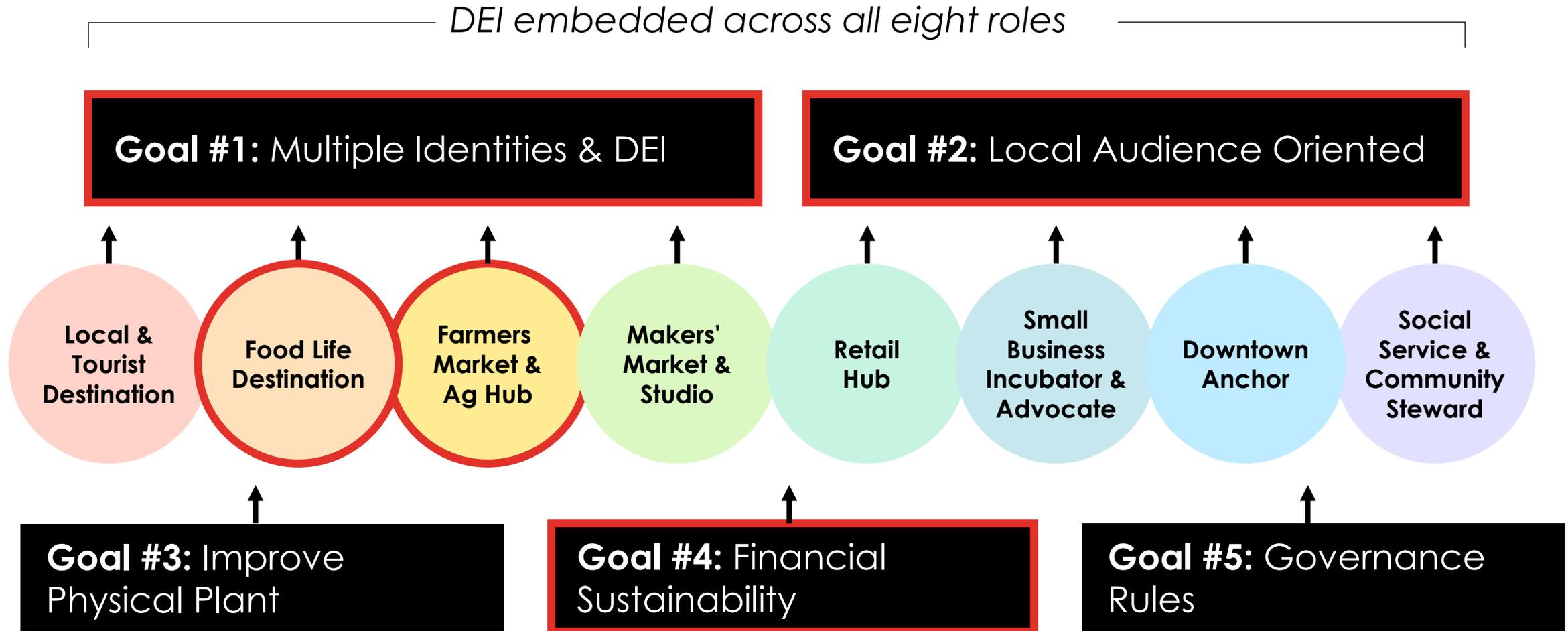
- Definition of Food Life
- Food Life in other city markets
- Food Life Strategy for PPM

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

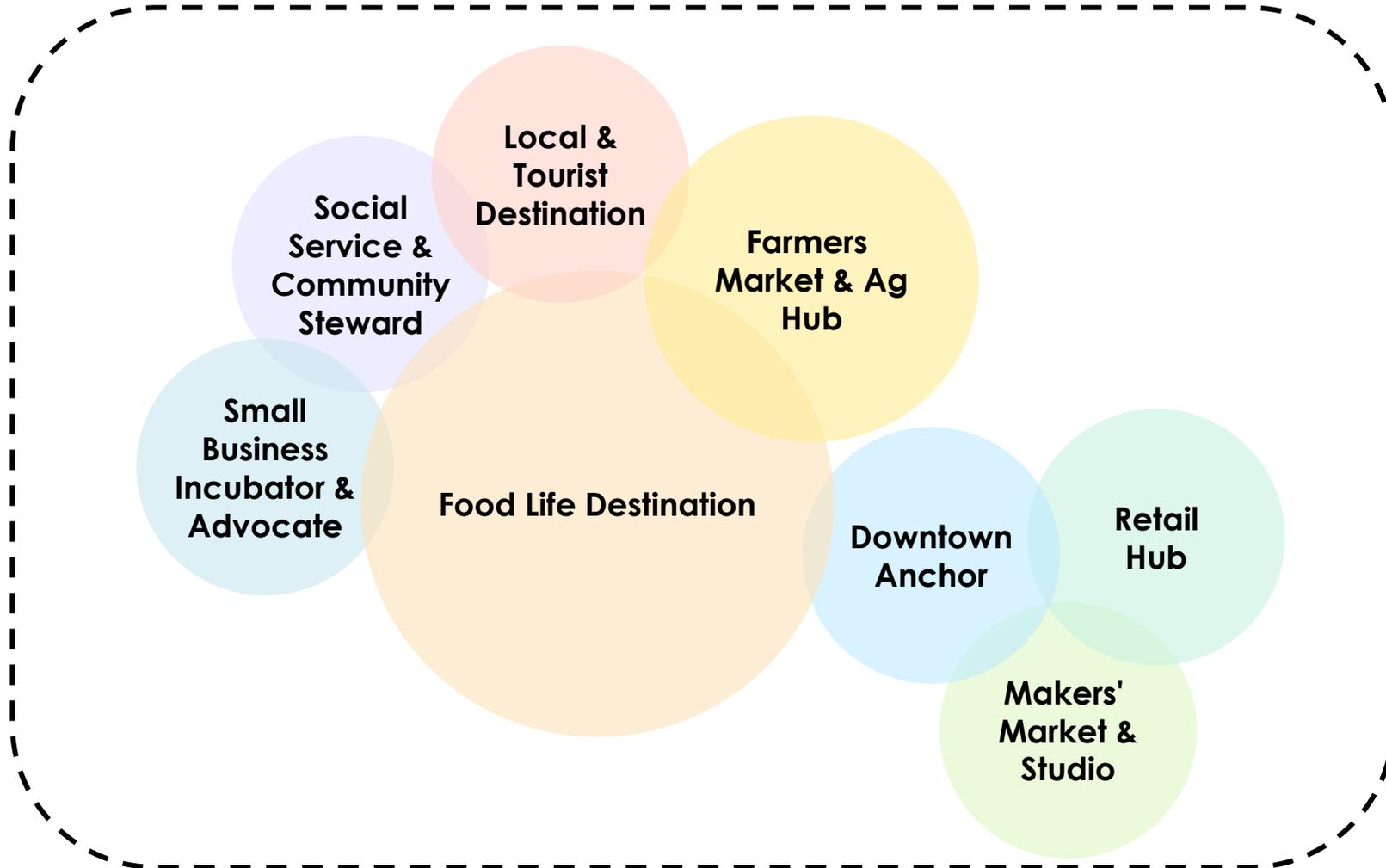
**Scenarios (food life curation, activation, place-making & financial implications)**

**Master Plan**

# PPM: Goals and Roles from 6/29 Council Workshop



# Food Life as a Focus



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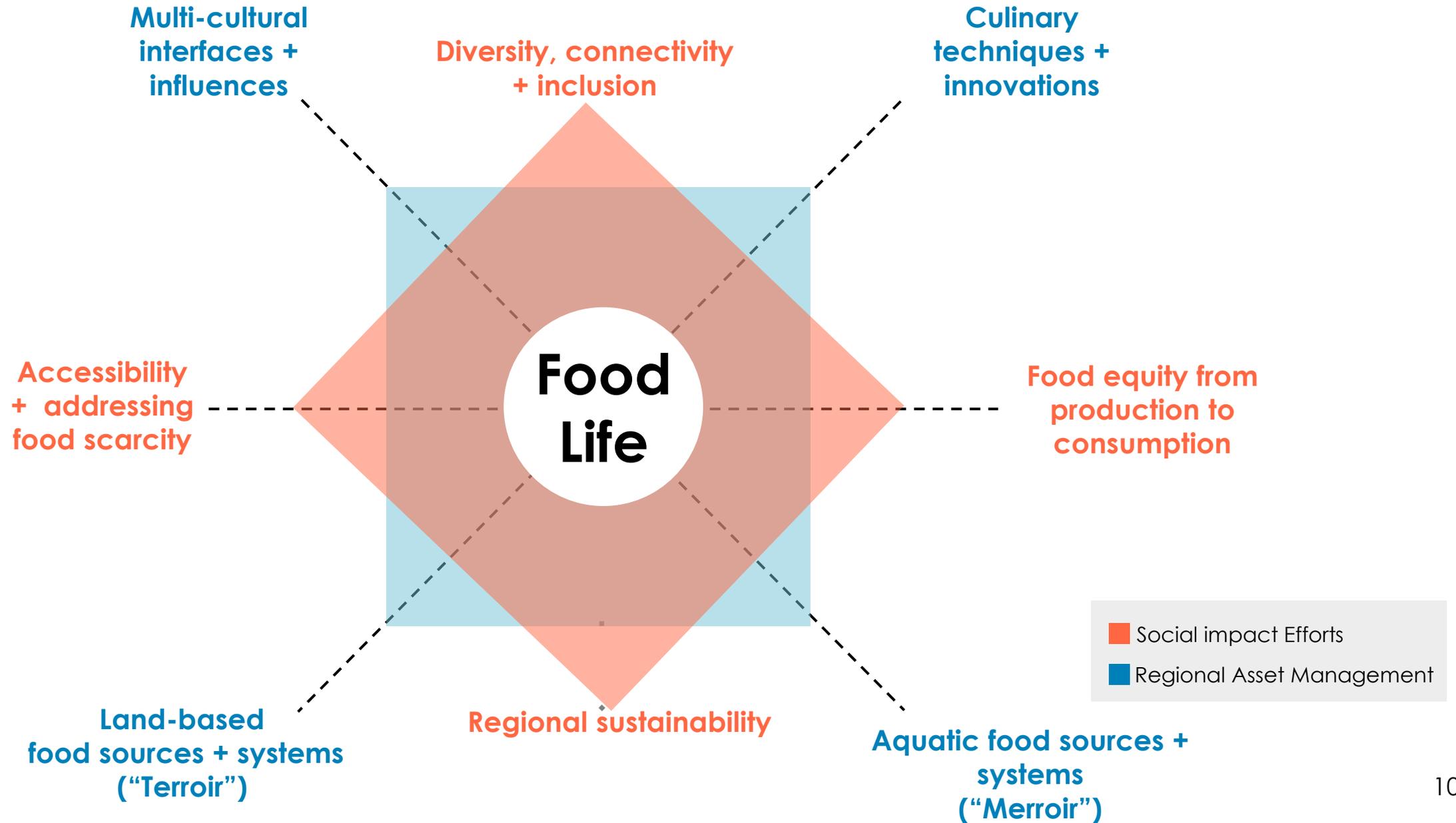
**the soul of  
the city**

# Defining Food Life

# Defining Food Life as a Distinctive and Sustainable Regional Food System



# Defining Food Life: Across 8 Dimensions



# Defining Food Life: Pacific Northwest Culinary Culture

- The Pacific Northwest is a **food life 'cornucopia'** with its rich land-based produce and its bountiful sea-based foods - fish, crustacea, mollusks and shellfish.
- **Multi-cultural influences** include Native American, Scandinavian, Irish, Mexican, Southern Black migrants, Japanese, Filipino, pan-Asian and Pacific Islander, and more recently African groups including Somali, Ethiopian and Eritrean immigrants.
- This mix is reflected in a wide variety of **regional dishes, culinary fusions** and **evolving dining concepts**.



# Defining Food Life: Pacific Northwest Culinary Culture

PPM is the only entity with the capacity, legacy and competence to advance this opportunity in full.

**PPM can foster a culinary culture with local authenticity and destination appeal, built on a sustainable food system that extends from the producer to the consumer.**

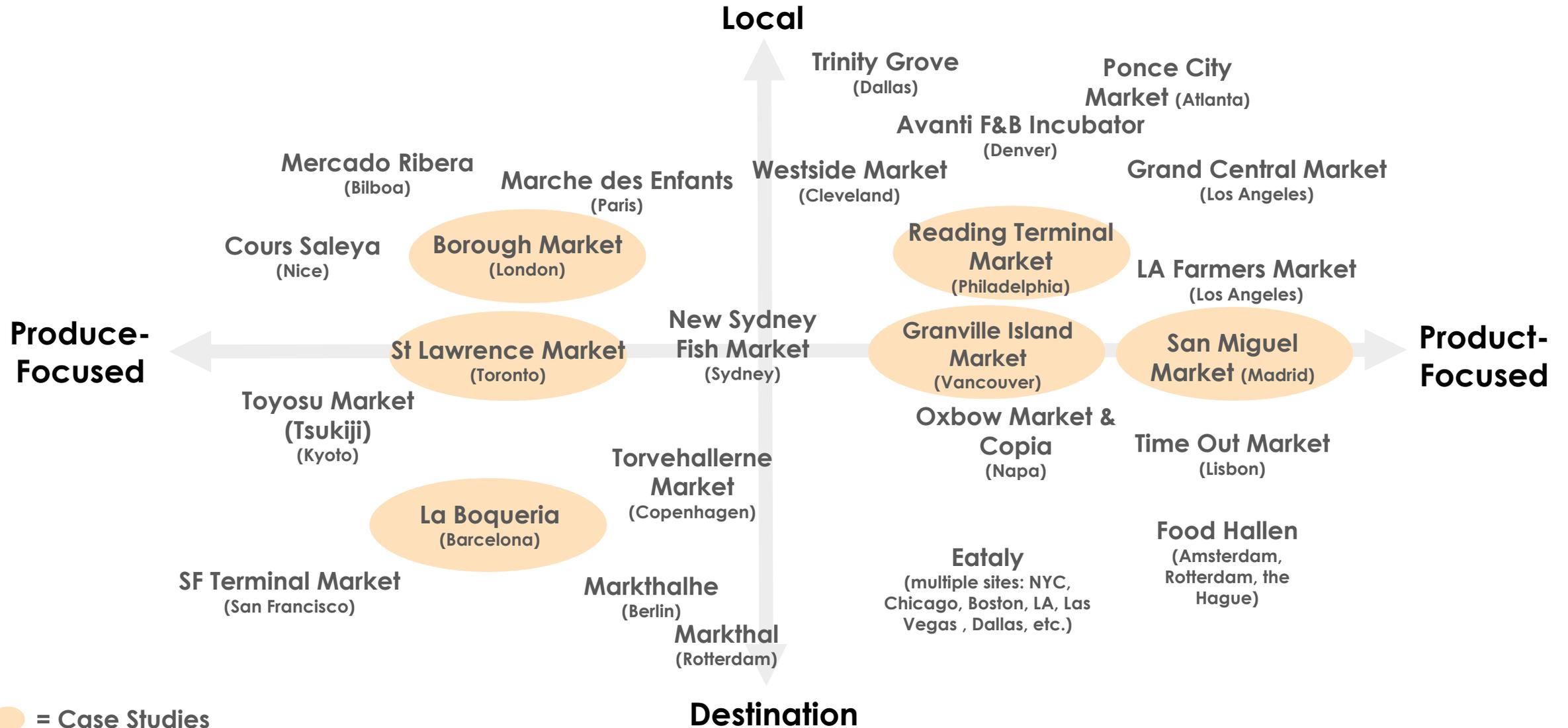


# City Markets as Regional Centers of Food Life

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



● = Case Studies

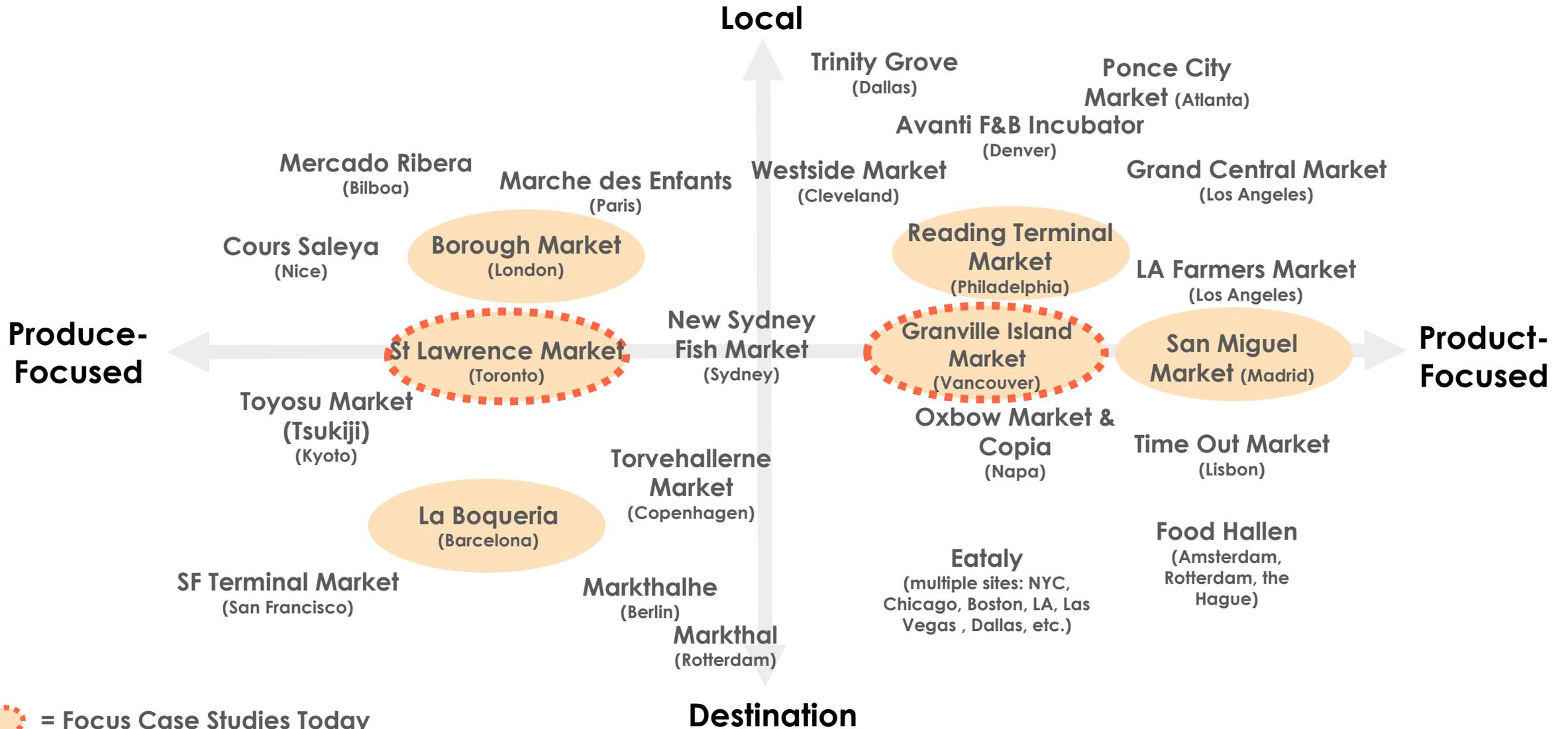
# Positioning Markets as Food Life Destinations and Local Community Hubs

## Best Practices from Review of 24 Markets:

1. Committing to refining **tenant curation** processes
2. Addressing **shifts in dining patterns** across all market segments
3. Creating offerings and environments which support **local connectivity**
4. Targeting Food Life experiences which are **unique to the region** and draw visitors
5. Leveraging events **programming and animation** as a key function
6. Developing approaches to supporting **producer participation** in the Market
7. Fostering **partnership relationships** to advance goals



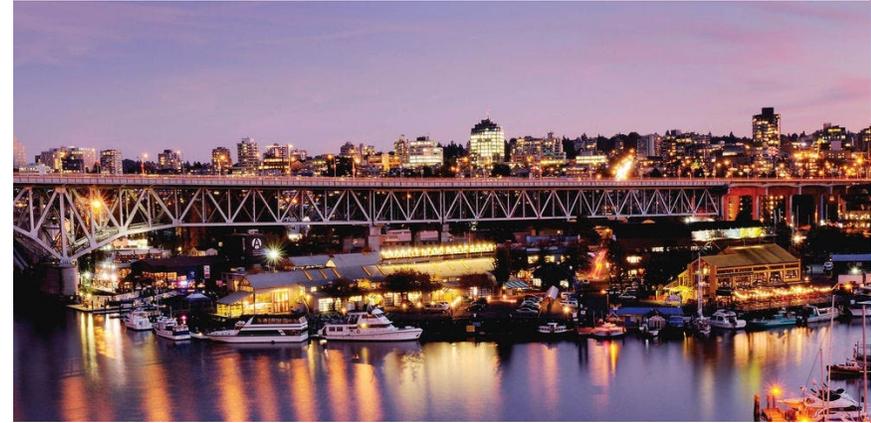
# Markets as Centers of Food Life: Local vs Destination + Produce vs. Product



# Markets as Centers of Food Life: Granville Island Public Market, Vancouver

**2040 Strategy** commits to establishing Vancouver's **leading food destination** and an international center of **innovation in the culinary arts**:

- **Demonstration kitchens** with a rotation of regional chefs
- On-site **culinary institute**
- Space for **food-related events**
- Restaurants on the leading edge of **culinary innovation**
- **Underrepresented** and **emerging food concepts**
- **First Nations'** culinary traditions and chefs
- **Evening operating hours** for dining + food events
- **Market District**
- **Mix of specialty markets** e.g., Spice Market, Fish Market, Forager Market, Ethnic Market



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

## St. Lawrence Market's Strategy focuses on 3 mandates:

### 1. Build Local Appeal as Basis of Authenticity:

- Redevelop the North Market as a mixed-use 'green' market for **community events** including the **Saturday Farmers Market**.
- Develop new tenant targets and programming to support local use of the Market Complex as a **social convening point** and **anchor for the evolving neighborhood**.

### 2. Food Life as Destination Strategy:

- Position the Market as the leading institution for Toronto's evolving **pan-cultural food scene**
- Position the Market as a **food destination** and must-see on the visitor itinerary.
- Enhance the Market's role as a gathering point, Market, and dining destination for the **community**

### 3. District Level Integration:

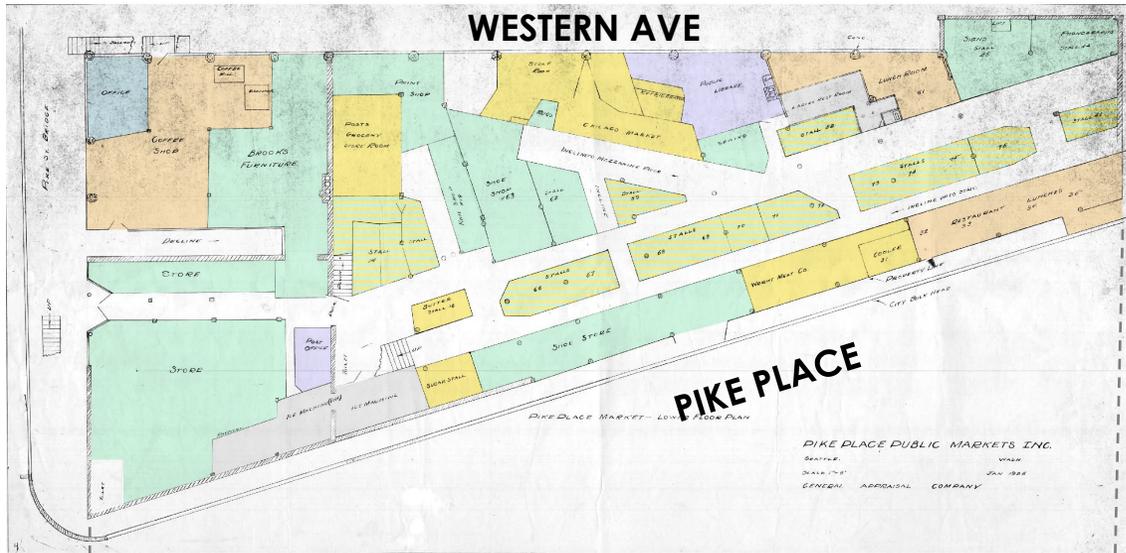
- Lead a **district integration initiative** with the surrounding York neighborhood to preserve character of Heritage Conservation District and set design standards for new construction.



# Pike Place Market as a Food Life Nexus

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

Down Under,  
1929



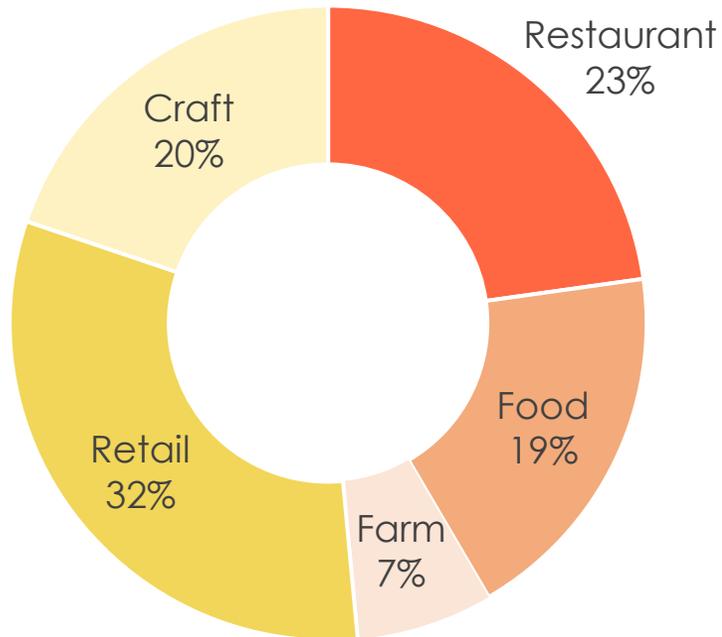
- Food Provider & Restaurant
- Produce & Agriculture
- Craft
- Retail
- Business
- Housing & Social Services
- Utilities

Down Under,  
Today



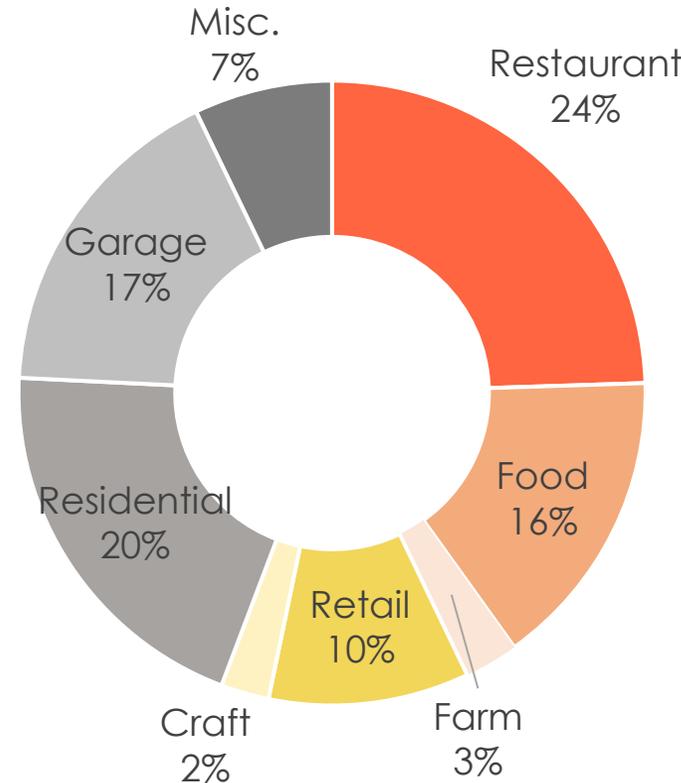
# Food Life is a Revenue Driver for PPM

Distribution of Merchant Types at PPM, 2022\*



**49%**  
of merchants are  
Restaurant, Food, or  
Farm

Distribution of PDA Revenue Sources, 2022\*\*



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

\* Number of Farm and Craft merchants is a daily average based on total Farm and Craft attendance data. Flower farmers (45 permits) are included in Farm (95 permits total).

\*\*Food, Restaurant, and Retail ("Non-Food") revenues to PDA include base + percentage rent as well as Common Area Charges (CAC). Revenues from Utilities, Tenant Reimbursement, and Late Fees/Service Charges are included in Misc. instead of their respective merchant type because they could not be disaggregated. Does not include payments/reimbursement from PPMQB3 (entity created by PDA to facilitate new market tax credit funding).

# PPM in the Future: Dependent on Response to Changing Context



# PPM: Community Connection and/or Tourism Destination

- **Food Mix as Engagement and Experience:**
  - **Locals** seek out food experiences that tend to be casual, affordable, distinctive in social environments...**"food as engagement"**
  - **Overnight tourists** tend to seek out food experiences that are unique, entertaining, in experiential environments...**"food as experience"**
- **The Market as Asset and Attraction:**
  - **Locals** seek out goods that are not generally available elsewhere, based on quality, diversity and service....**"the Market as a unique community asset"**
  - **Overnight tourists** seek out market experiences that are memorable and entertaining...**"the Market as a destination attraction"**



# PPM: Changing Downtown and Waterfront – Threats and Opportunities

## Redevelopment of Waterfront:

- As a **vertical market** PPM is in a unique position to create physical and programmatic connections to the waterfront and the downtown - advancing roles as a **Destination** and **Community CenterPoint**.
- PPM can **benefit from an increase in tourism to the waterfront**, but risks devolving towards a tourist attraction rather than authentic experience.

## Need to Revitalize Downtown:

- PPM's role as an authentic place of **community** identity and connection can be enhanced as an **anchor for downtown** revitalization, but will likely involve some level of conflict with other interests involved in Downtown redevelopment



# Defining a Food Life Strategy

# A Food Life Strategy for PPM

## 1. Curate food offerings and experiences

- Curate market and food offerings to address **local needs and wants**; and **visitor wants**
- Embrace **curation** as a process for building a **critical mix** of offerings
- Identify **zones and itineraries** across all levels of PPM for Food Life offerings in the context of waterfront and downtown revitalization

## 2. Renew “Meet the Producer” strategy

- Identify and support **producers' needs** to elevate their Market participation
- **Diversify the Market's mix of produce and harvested offerings** – highlighting local and artisanal products – to serve **local demand** and create more opportunities to supply **Market restaurants**

## 3. Adapt to changing context

- Evaluate Market opportunities in relation to broader **Downtown** and the **waterfront**
- Extend the regional reach of PPM in terms of its role as a steward for **sustainability and equity**
- Identify and prioritize **facilities and technologies** that support the success of PPM's tenants and the experience of its guests

# A Food Life Strategy for PPM: Physical Strategies



## “Taste of the Market”

- Multi-cultural PNW food experience
- Taking on a Food Studio, Food Hall or Street Market



## Restaurant Incubator

- Featuring 4-5 startups that roll out or into PPM every 3 years



## Dining Cluster of Restaurants

- Designed to draw locals with space that is off tourist itinerary



## Cooking Studio

- Featuring rotating chefs



## Waterfront Connection

- Food offerings at lower Market level



## First Nations food and culture anchor experience

- Showcasing origination of PNW cuisine



## Programmable Space

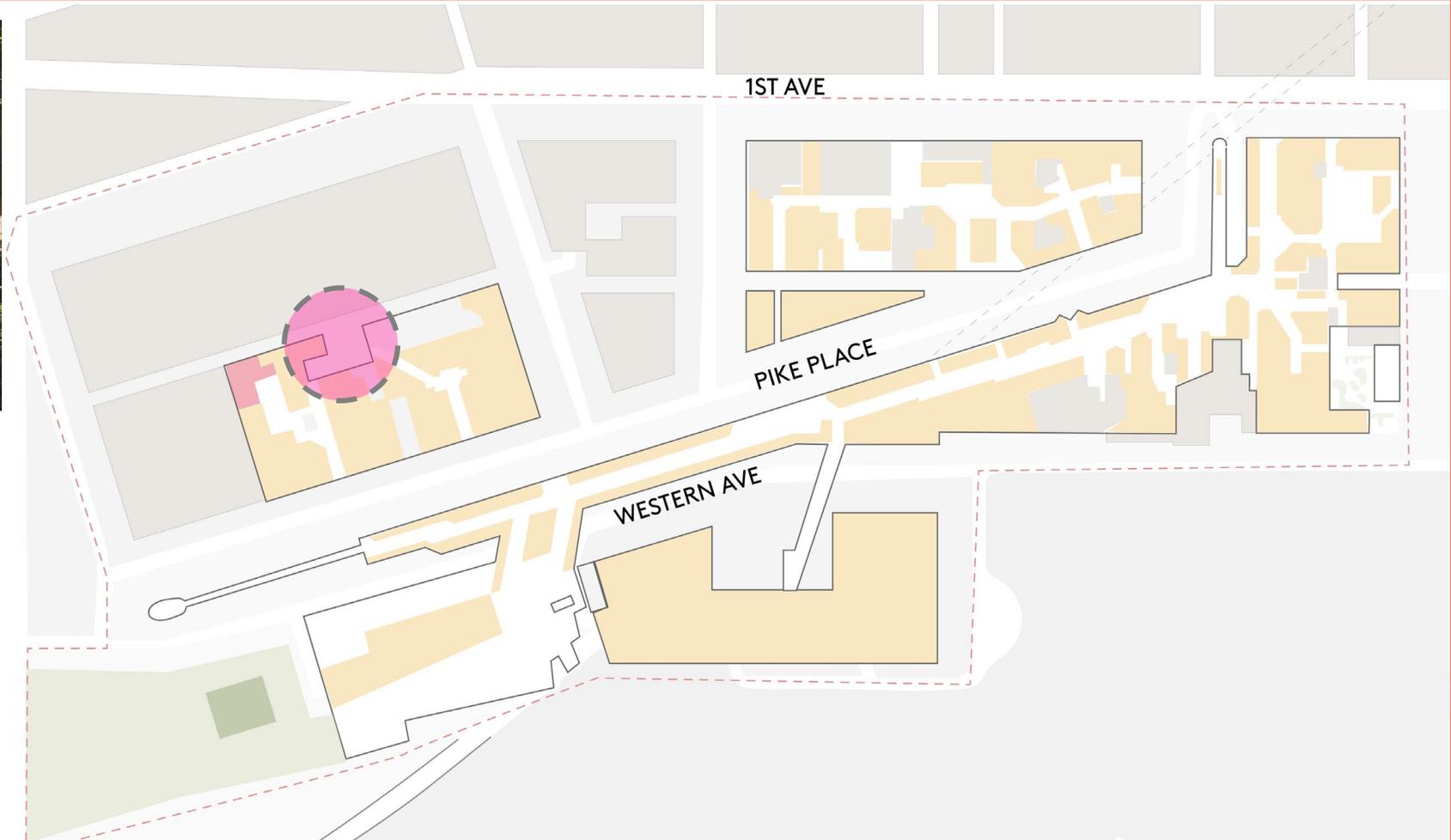
- Allowing farmers market to expand as multi-cultural food and produce Saturday market



## PNW Winery Center

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

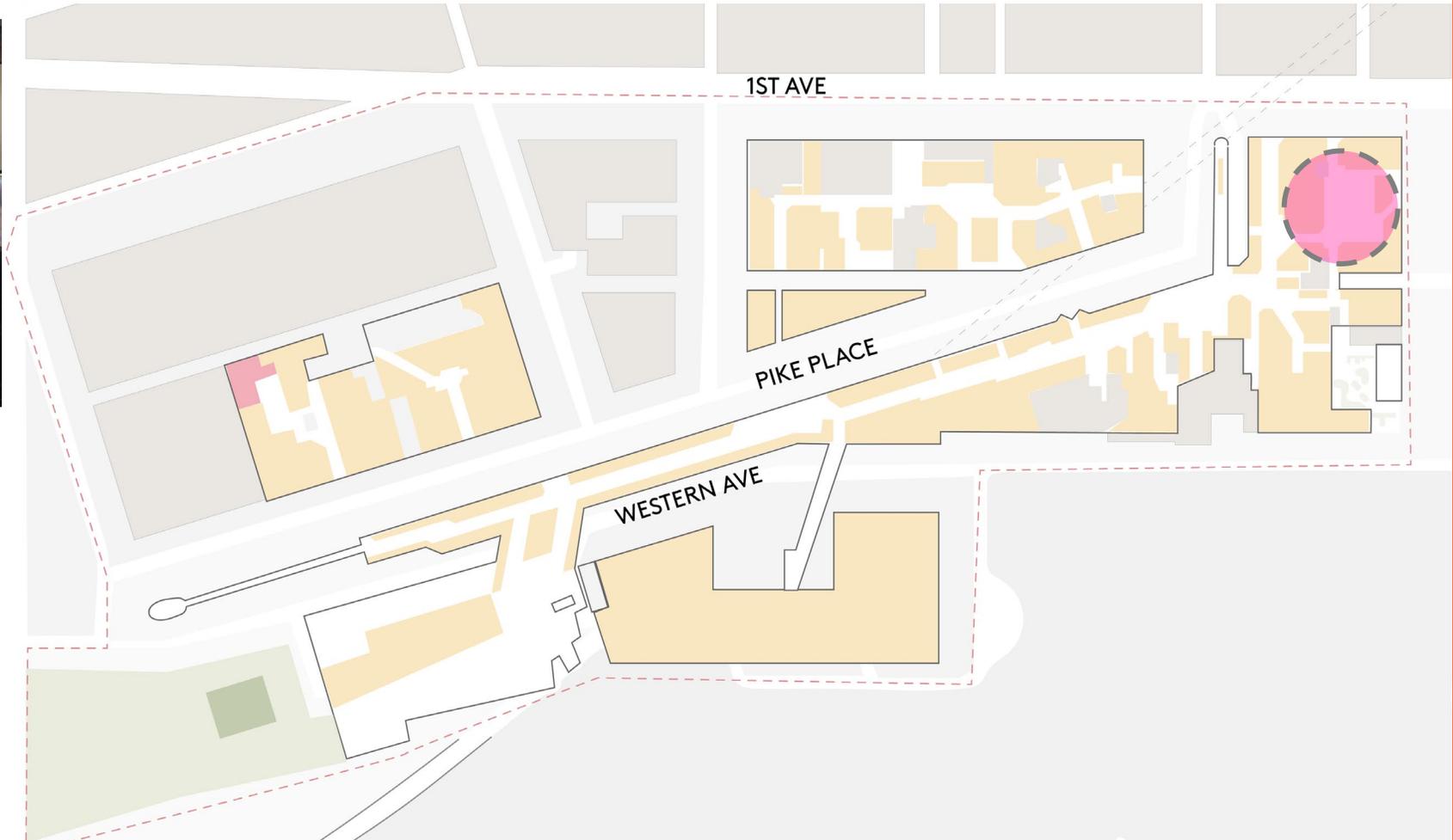
# A Food Life Strategy for PPM: Soames Dunn Courtyard



## What if we...

- Supported the courtyard with indoor/outdoor seating and dining?
- Created a PNW winery center adjacent to the courtyard?
- Added visual art to link the upper and lower levels i.e., umbrellas?

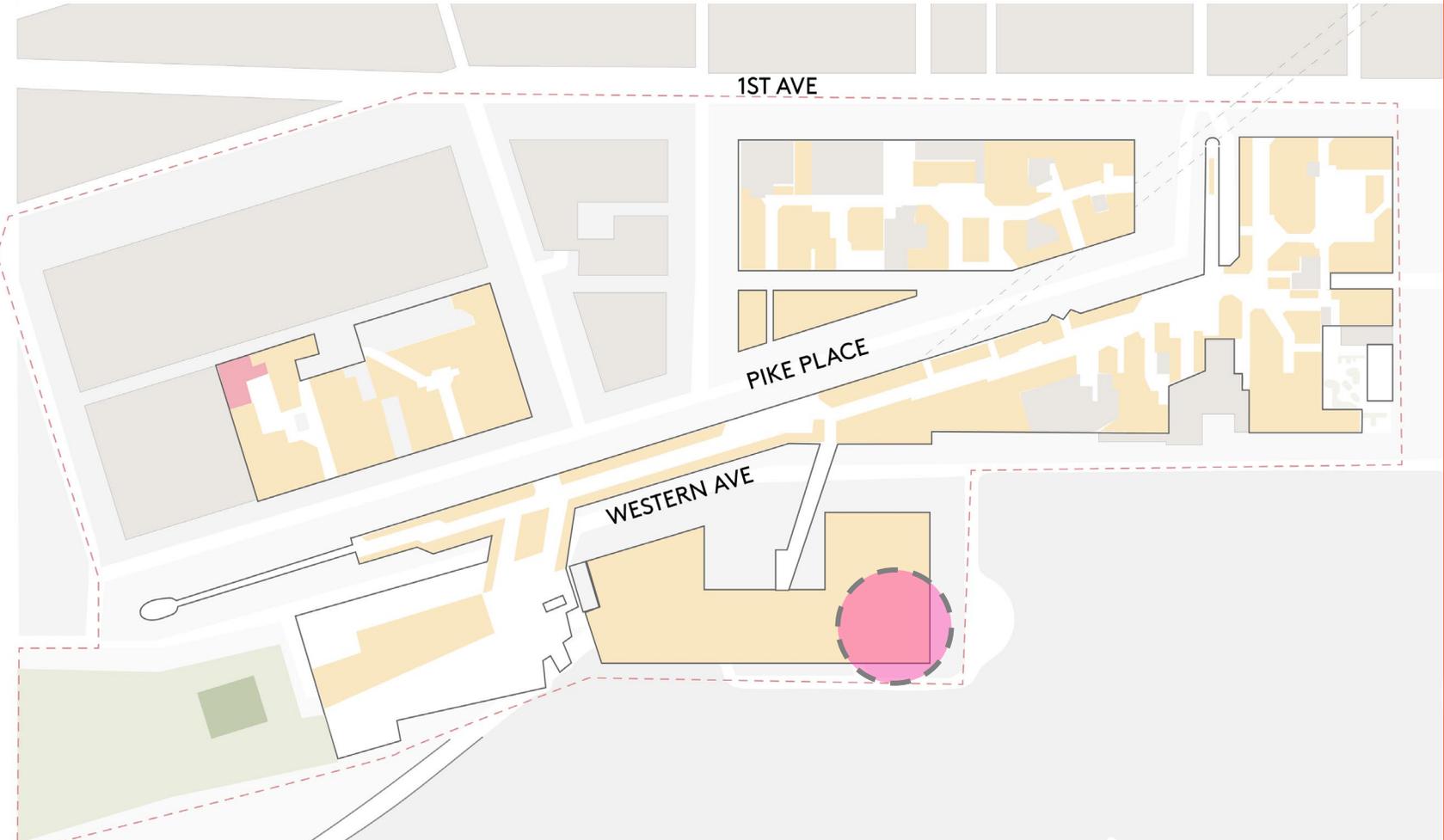
# A Food Life Strategy for PPM: Economy Market Atrium



## What if we...

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

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



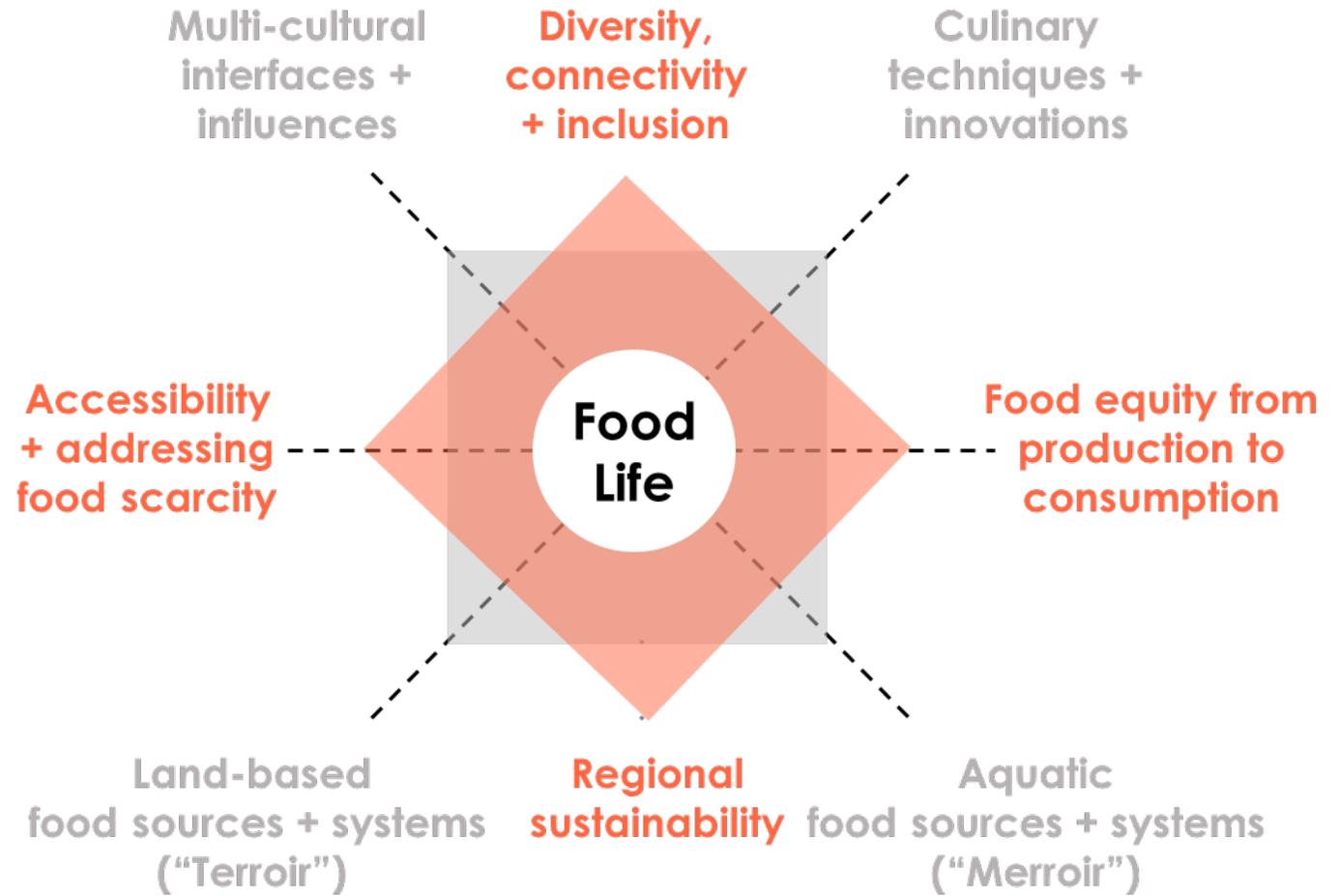
## What if we...

- Programmed the space for a Saturday produce market?
- Moved the Food Bank up to face onto Western Ave to better support their activities and highlight PPM's role as a social service provider?

# The consultant team believes the PDA should embrace Food Life strategies with intentionality.

## Benefits

- DEI and social impact
- More local visitors during shoulder season within additional revenues to businesses and PDA
- Larger - and potentially more diverse and distinctive - base of producers selling to more locals and Market businesses
- Stronger physical and programmatic ties to waterfront and downtown, benefitting Seattle as a whole
- PNW core to the Market's identity and brand
- Other?



■ Social impact

■ Regional Assets 32

# Not adopting Food Life as the central idea of the Master Plan is a greater risk than any risk inherent in its adoption. There are, however, risks.

## Risks

- A less quirky, exploratory experience

## Challenges

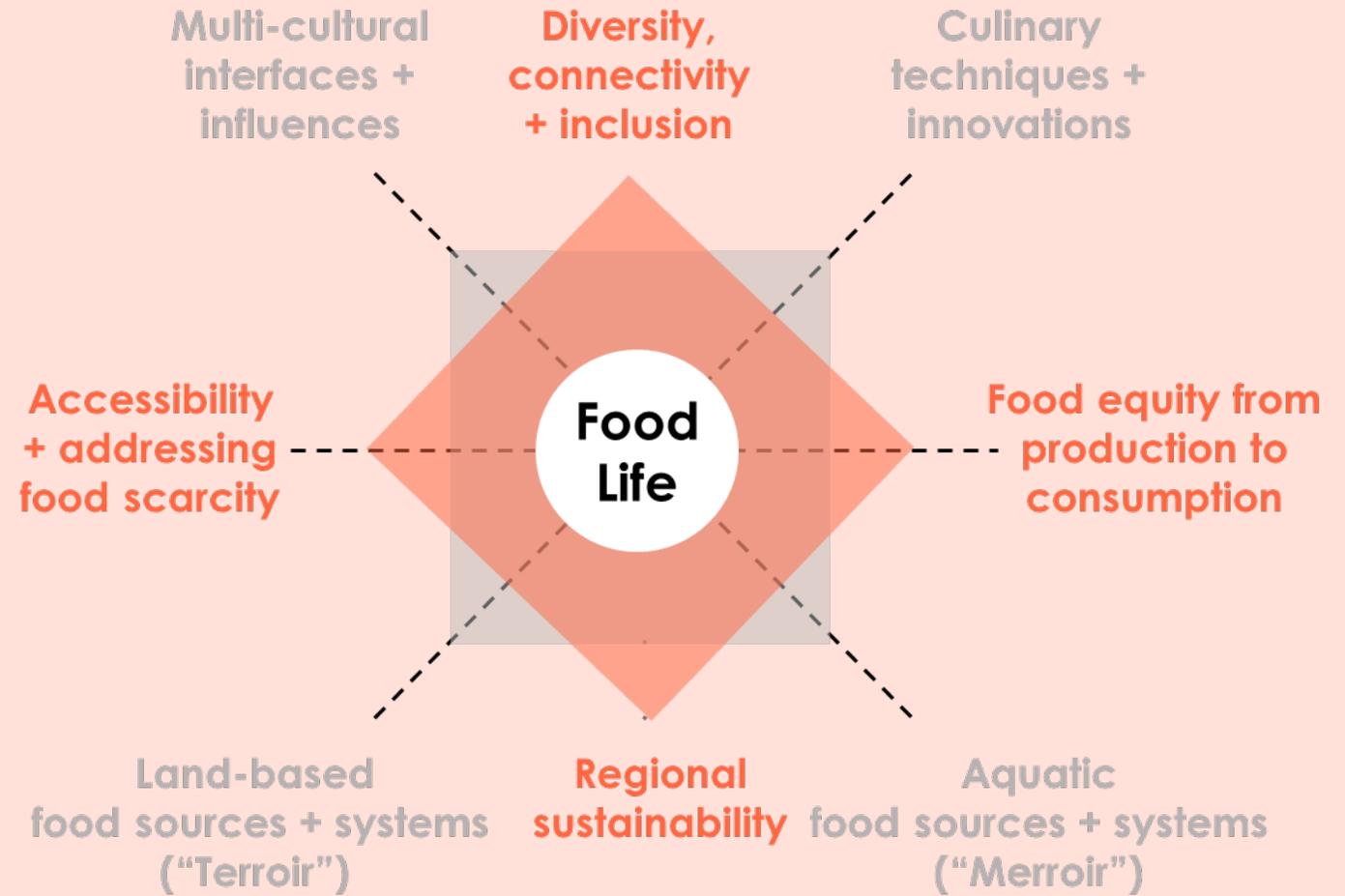
- Physical upgrades to accommodate more food uses and programming
- Subsidy to support and retain farmers
- Capacity to curate, recruit, support, and advocate for more food merchants and manage new programming



## Discussion:

As of now, do you agree that Food Life is the probable **central, animating idea** of the Master Plan?

Based on PPM's values, strengths, and opportunities, which potential **social impacts** should PPM put at the forefront of a Food Life strategy?



■ Social impact

■ Regional Assets 34