

WILBURTON COMMERCIAL AREA STUDY





Wilburton Trestle

Agenda

Results of Public Survey

- Identify common themes between CAC discussion, Stakeholder Interviews and Public Survey

B. Calvert, NBBJ

Economic Information and Discussion

- Present early economic research and market analysis

B. Vanneman (Leland Consulting)

Case Studies

B. Calvert, NBBJ

Prioritization of Assets, Opportunities and Framework

- Discussion on establishing priorities that will inform the overall vision of the Wilburton Commercial Area

B. Calvert, NBBJ

SURVEY RESULTS



Online Open House Overview

- Site was live Feb 13 – Feb 27
- 5 pages in total
- In numbers:

5:13

AVG. TIME ON SITE (MIN)

782

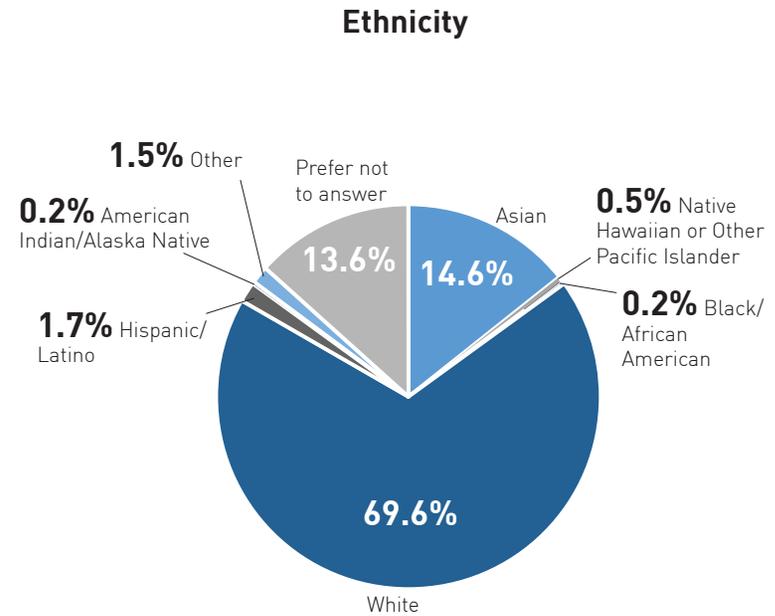
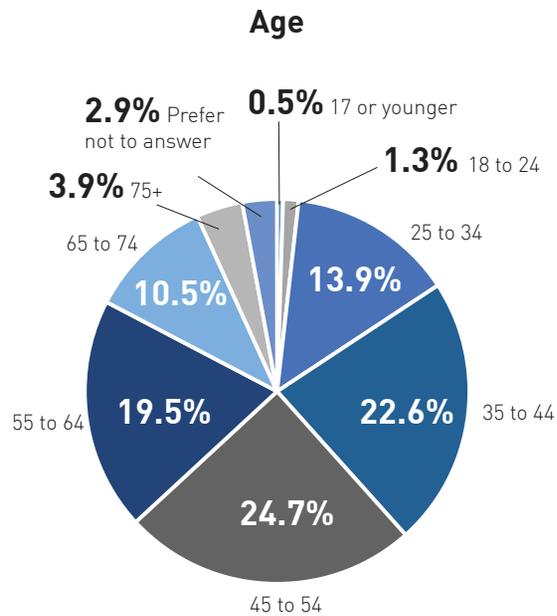
TOTAL VISITORS

3.75

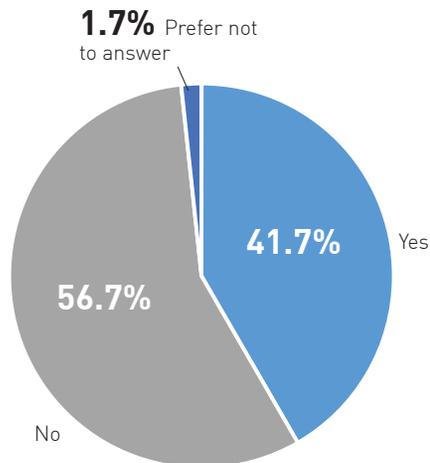
PAGES PER SESSION

- Key comment themes:
 - Respondents tilted towards **long-time Bellevue residents**
 - Desire for **cultural space** (art, music, theater)
 - **Outdoor recreation/walkability** is highly valued

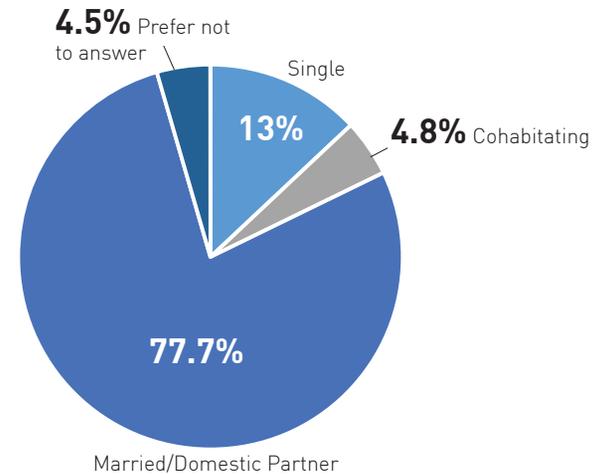
Demographic Responses



Children in Household (Under 21)

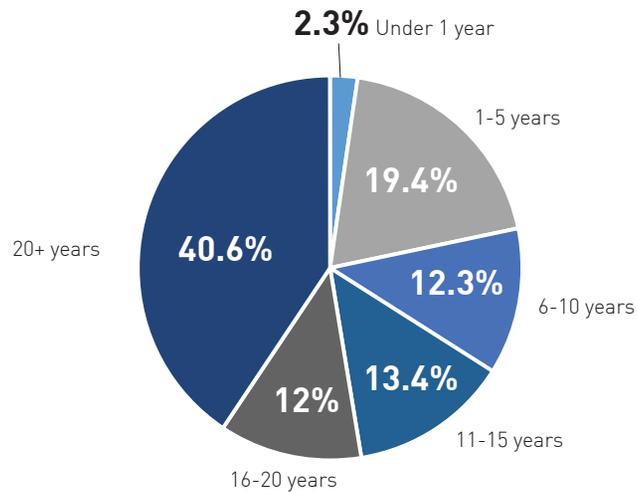


Household Composition

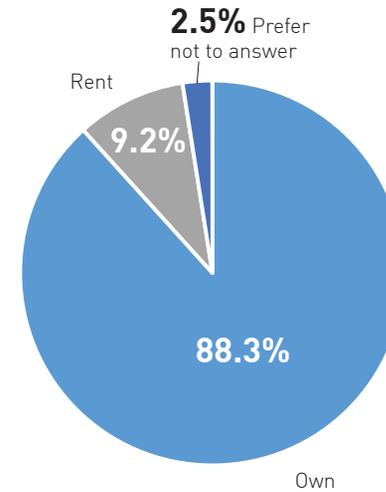


Demographic Responses

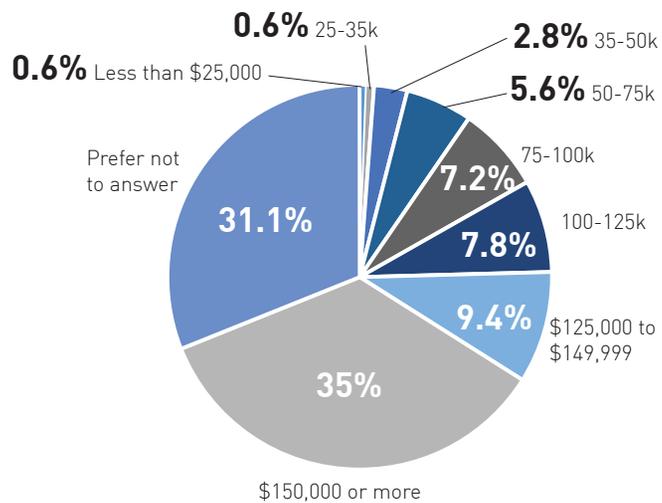
Years Lived in Bellevue



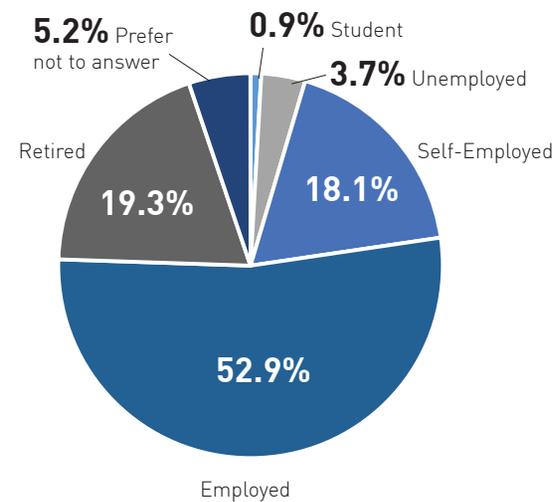
Own/Rent



Household Income



Employment Status



Thinking Big Station



- Total Responses: 149
- Question 1: What future uses for this area (e.g. shopping, outdoor recreation, nightlife) would benefit you personally? (Top themes in responses)
 - Outdoor recreation opportunities (green space, trails, playing fields)
 - Pedestrian-friendly shopping/restaurants/nightlife
 - Library, shelter, and other public services
 - Movie theater or community theater
- Question 2: What is Bellevue currently lacking that might find a home in the Wilburton Commercial Area? (Top themes in responses)
 - [Many similar answers to previous question]
 - Affordable housing
 - Live theater and cultural center
 - Incubator space for businesses that start in Bellevue

Character Station



- **Total Responses: 123**
- **Question 1: What kind of character do you think a new urban neighborhood should have?**
(Top themes in responses)

- Great food and small shops (not chains or “cell phone stores”)
- Green, walkable, designed around a town square/neighborhood center
- Cultural diversity
- Art shops, public art, and places for artists to live/work



- **Question 2: Is there an unmet need in Bellevue for a neighborhood with a specific type of character or to serve a specific demographic?** (Top themes in responses)

- Venues for art and live music
- Public market or general gathering place that isn't a mall
- Designed to be seniors-friendly (“stroll-friendly”)
- “Human-scale” development (not “towers”)
- Affordable housing for young people and seniors
- International/Asian district

Defining Features Station



- Total Responses: 119
- Question 1: The following elements or attributes of the Wilburton Commercial Area either already exist, or will exist in the future. Which do you think has the greatest potential to define this area's future? (Pick 3 of 9) (Top themes in responses)
 - Grand connection (66%)
 - East Link light rail (61%)
 - Eastside Rail Corridor (60%)
 - Proximity to Downtown (35%)
- Question 2: The study area's future development could pursue many possible directions. Which of the following uses or elements should be prioritized? (Pick 3 of 14) (Top themes in responses)
 - Park and public space (47%)
 - Community and neighborhood-oriented businesses (39%)
 - Pedestrian and cyclist network (35%)
 - Natural environment (streams, wetlands, etc) (31%)
 - Affordable housing (25%)



Bellevue Wilburton-Grand Connection Study

Real Estate Market Analysis

PREPARED BY



FEBRUARY 2017

Authentic

A Great Urban Neighborhood

Connected & Pedestrian Friendly

Active & Healthy

Affordable

Different from Downtown

Diverse and Multiethnic

Technology and Entrepreneurism

Special Opportunity Area

Are these the right goals?

Are they feasible?

How can the City help make them happen?

Authentic

A Great Urban Neighborhood

Connected & Pedestrian Friendly

Active & Healthy

Affordable

Different from Downtown

Diverse and Multiethnic

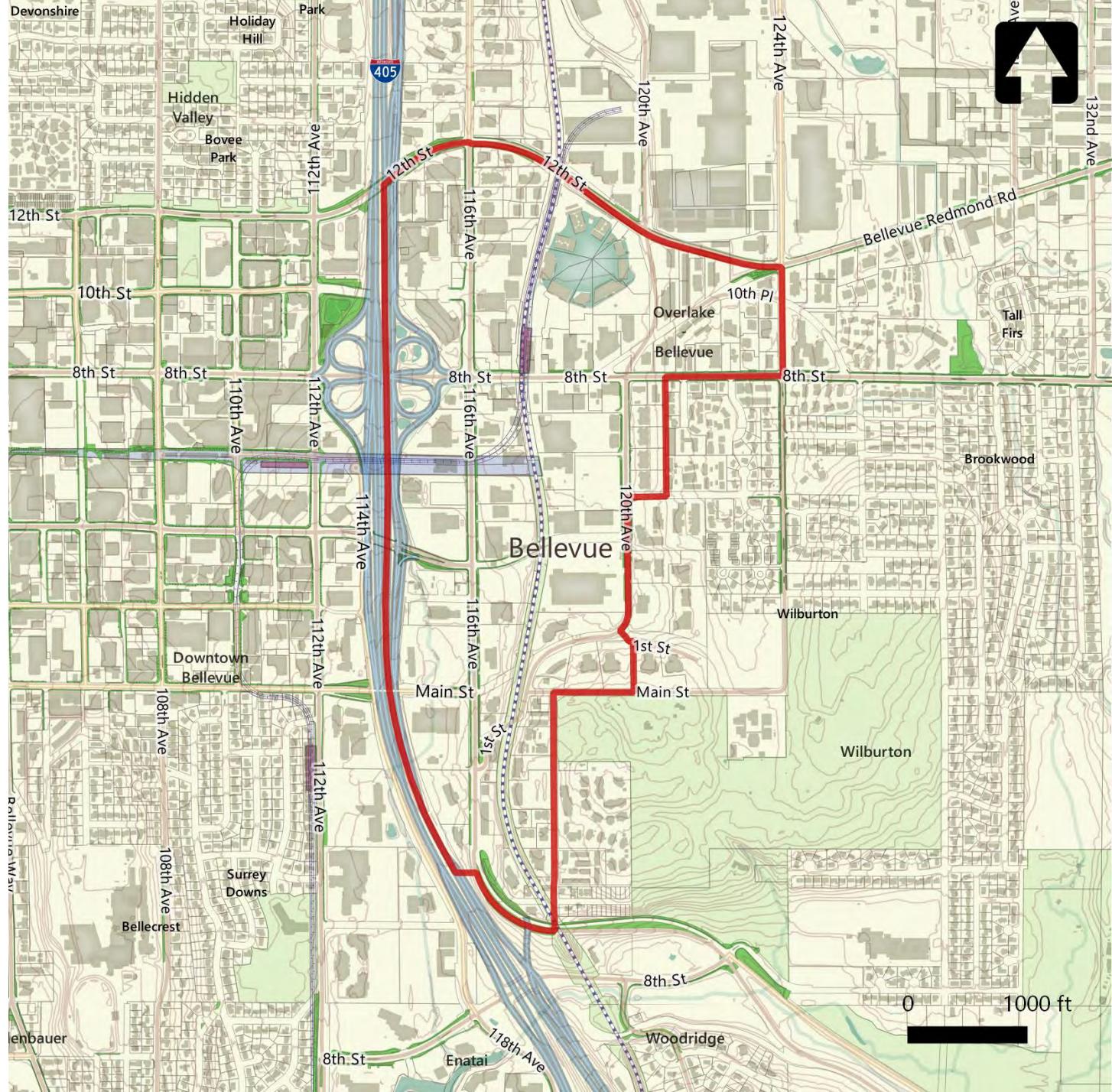
Technology and Entrepreneurism

Special Opportunity Area

In order to plan for an authentic future, we must understand real estate market conditions and projections for Wilburton and surrounding areas.

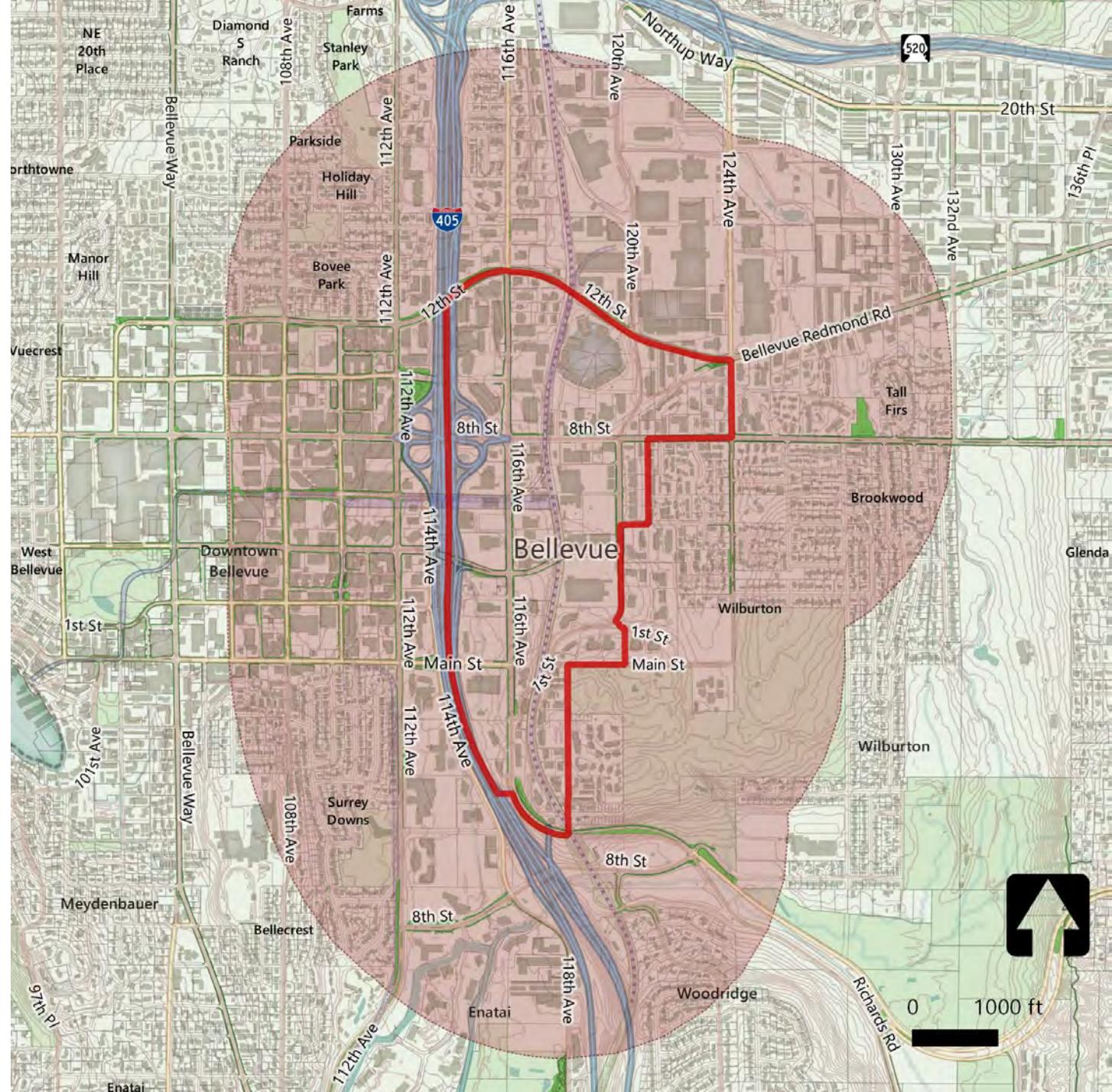


Wilburton Study Area



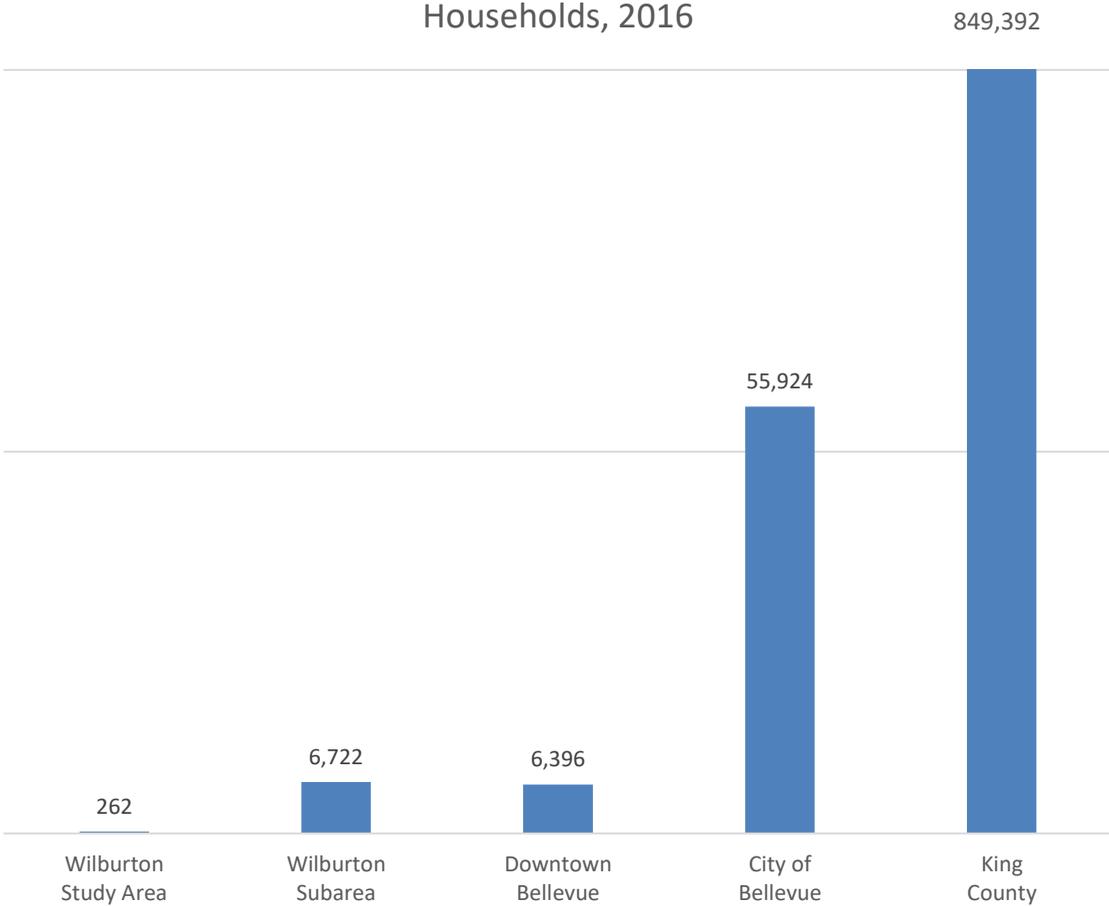
Wilburton "Subarea"

Study area, plus
additional ½ mile
surrounding area



Number of Households

- Very few households currently live in the study area.
- The Wilburton Subarea contains about 12 percent of the City's households. Downtown contains 11 percent.



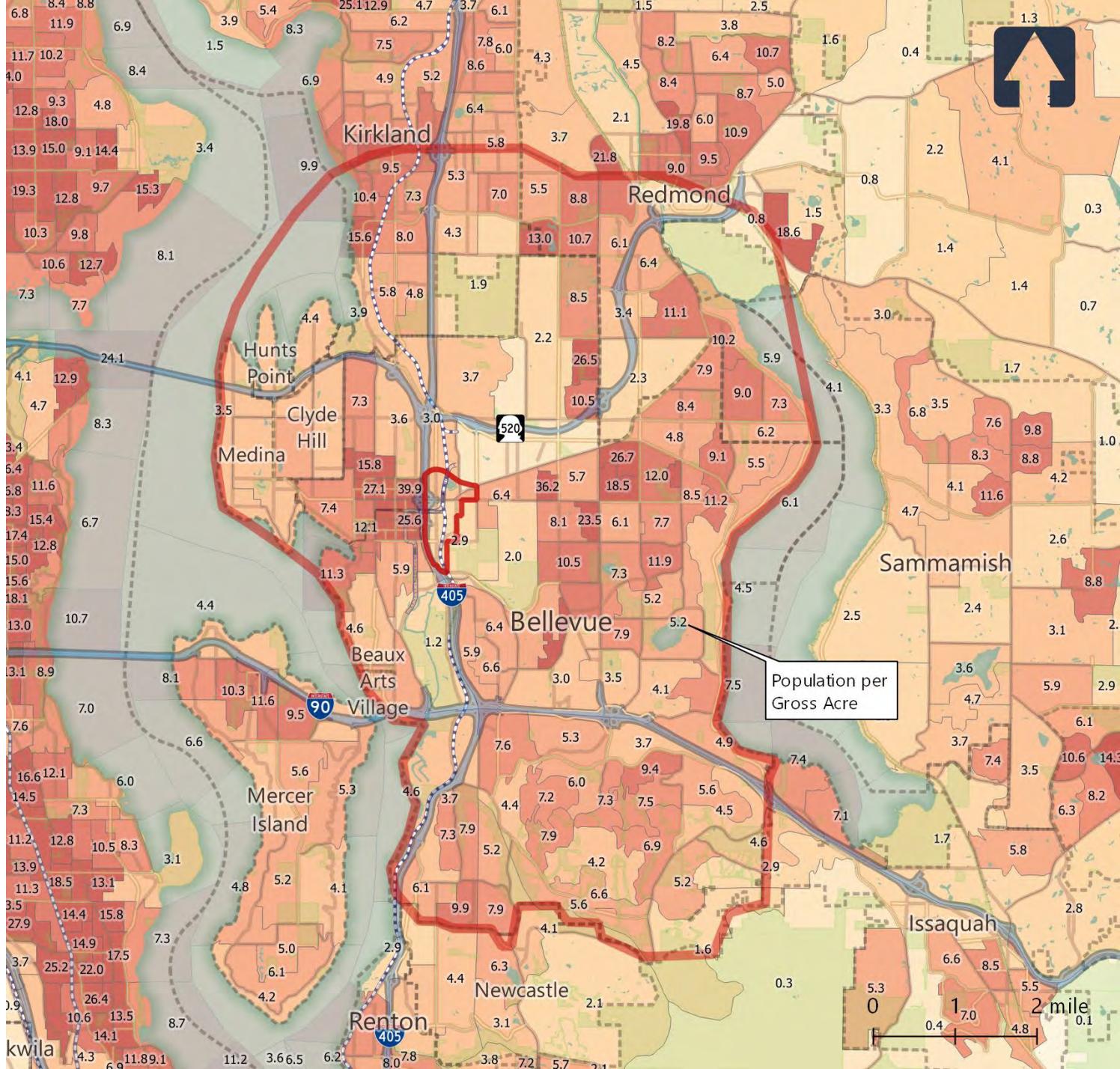
Source: ESRI Business Analyst, US Census, Leland Consulting Group.

Wilburton Market Area

For the purposes of this study, the Wilburton Market Area is defined as the City of Bellevue, and those portions of Redmond and Kirkland south of Redmond Way/Central Way. A market area is the larger context area from which a majority (70 to 80 percent) of demand for real estate is expected to originate—e.g., residents' demand for retail goods and services. It is also the primary area in which other districts or projects may compete with Wilburton. Long-term PSRC population and employment projections are used for the market area; "capture rates" are then estimated for the study area.



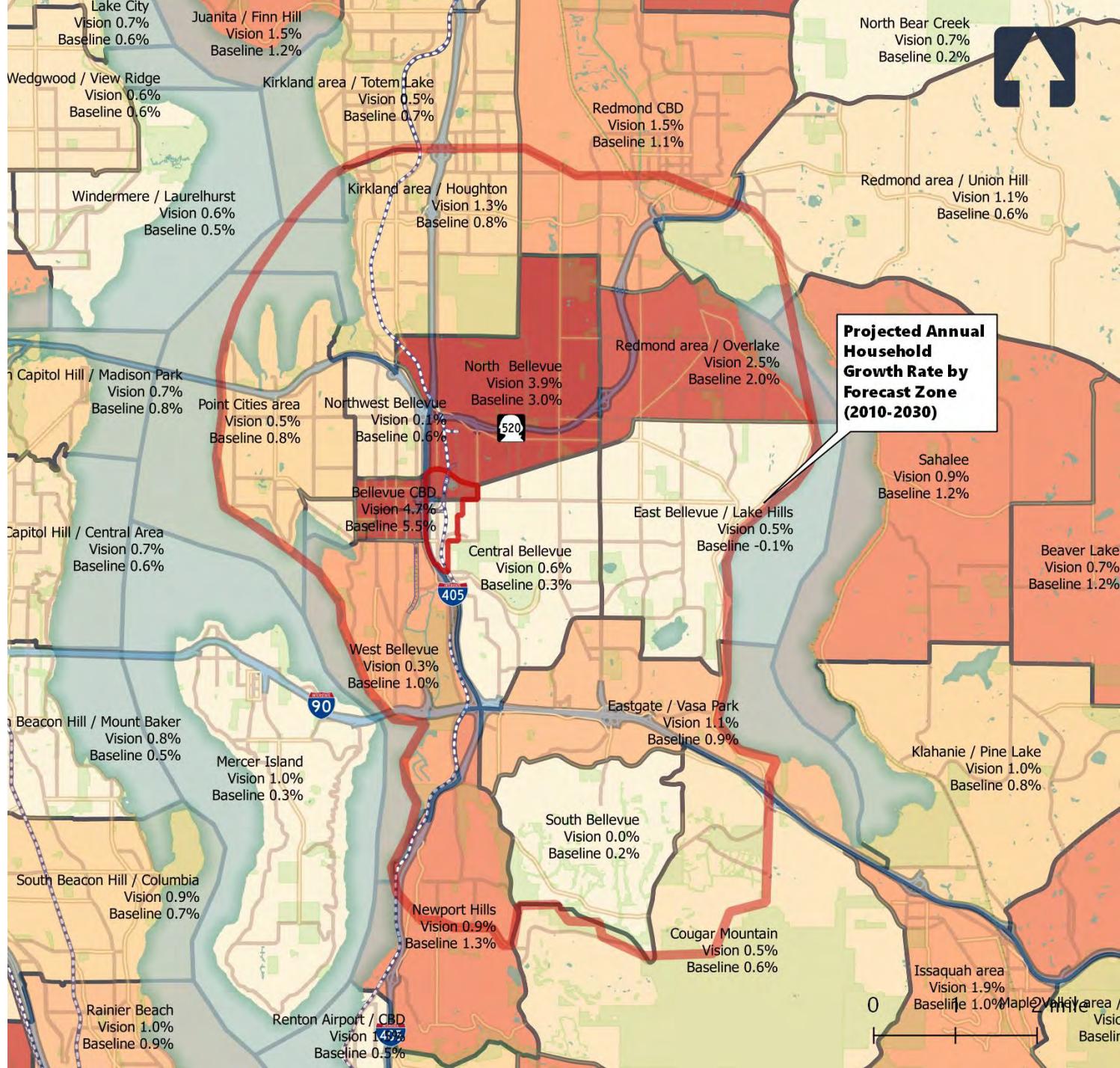
Population Density (per gross acre)



Source: US Census.

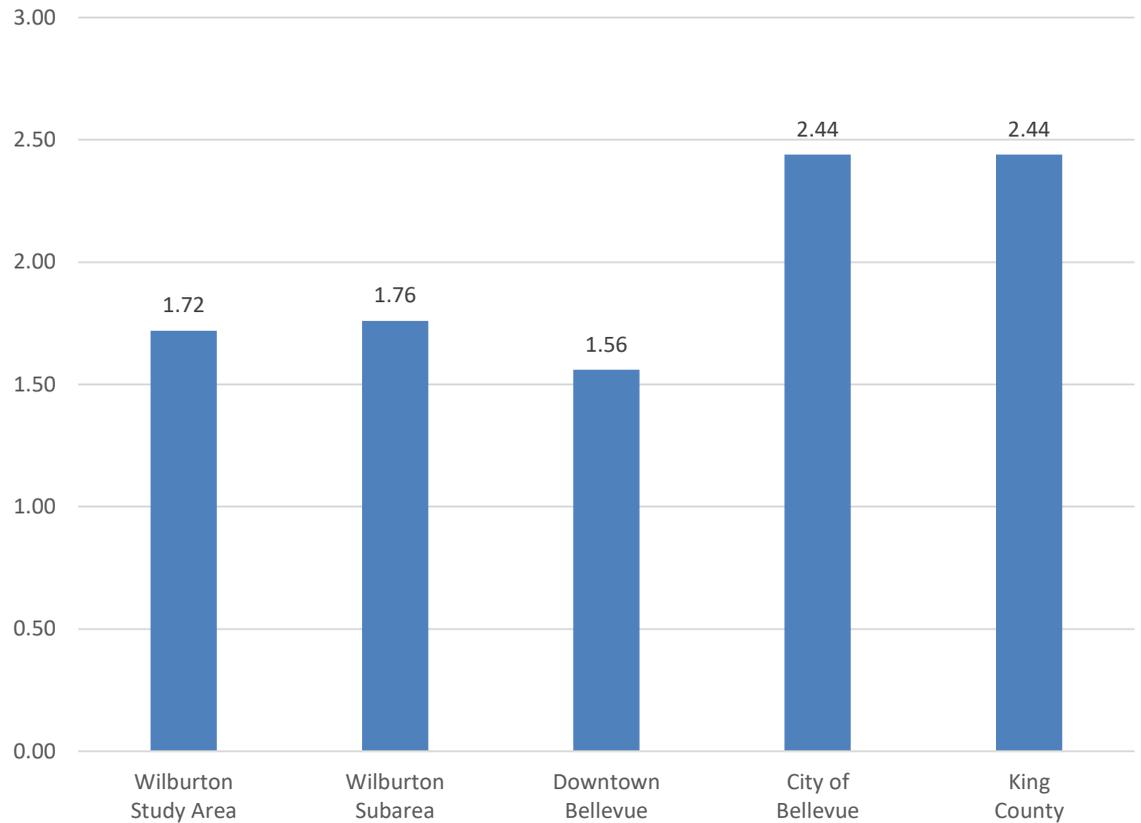
Projected Population Growth

2010 to 2030, average annual rates, by Forecast Analysis Zone (PSRC)



Average Household Size

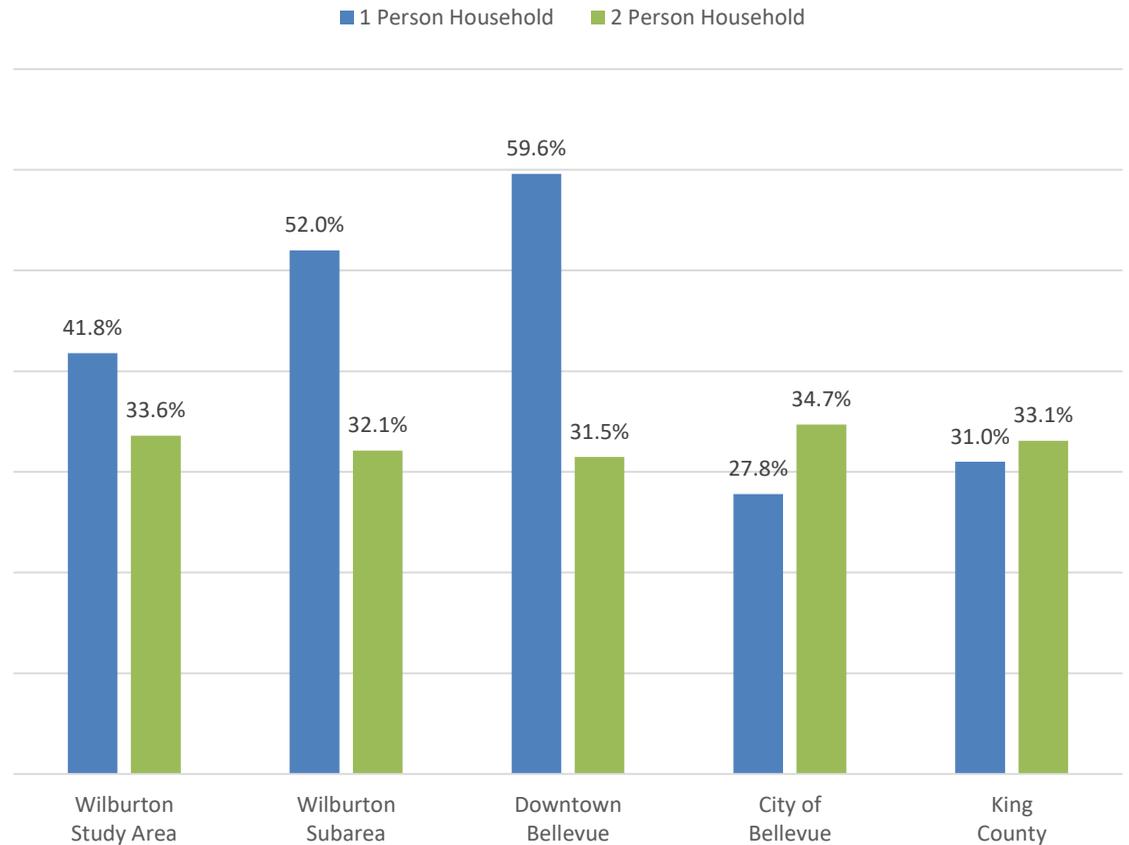
- Wilburton's households tend to be smaller than the City's.
- A greater share of Wilburton's households tend to be single people, or roommates living together.



Source: ESRI Business Analyst, US Census, Leland Consulting Group.

1 and 2 Person Households

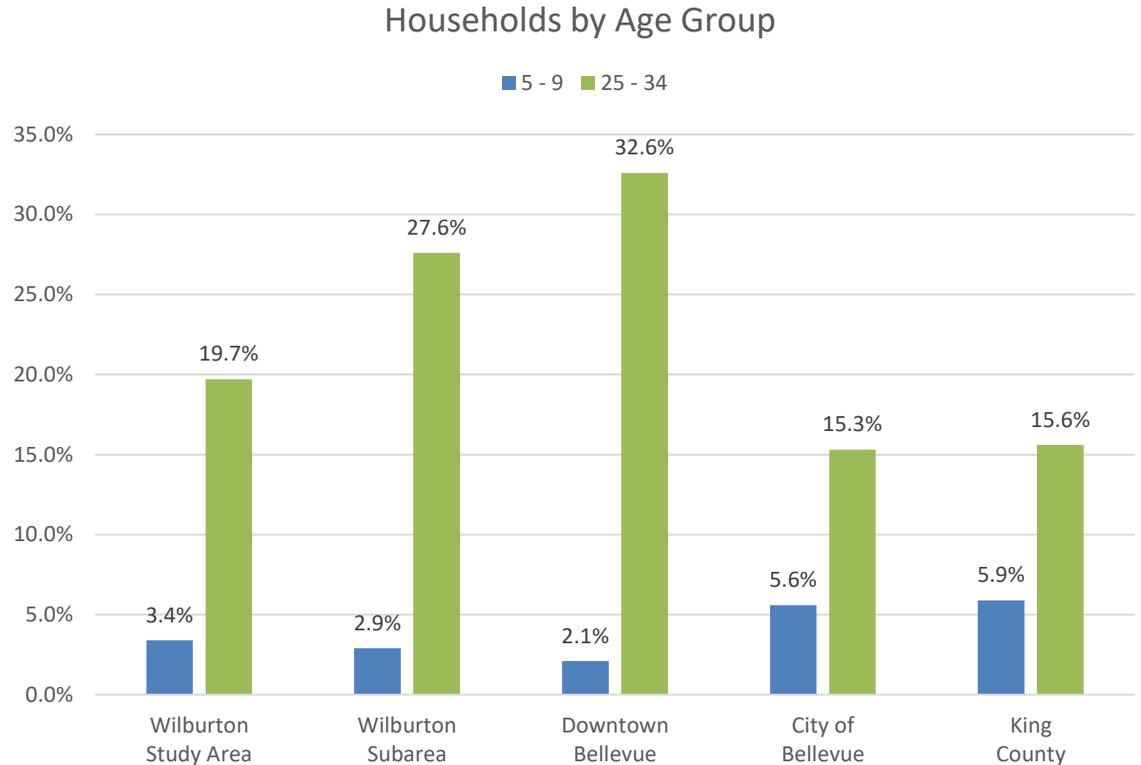
- Bellevue's central areas—including Wilburton and Downtown—have far more 1 person households than the City or County.



Source: ESRI Business Analyst, US Census, Leland Consulting Group.

Age Groups

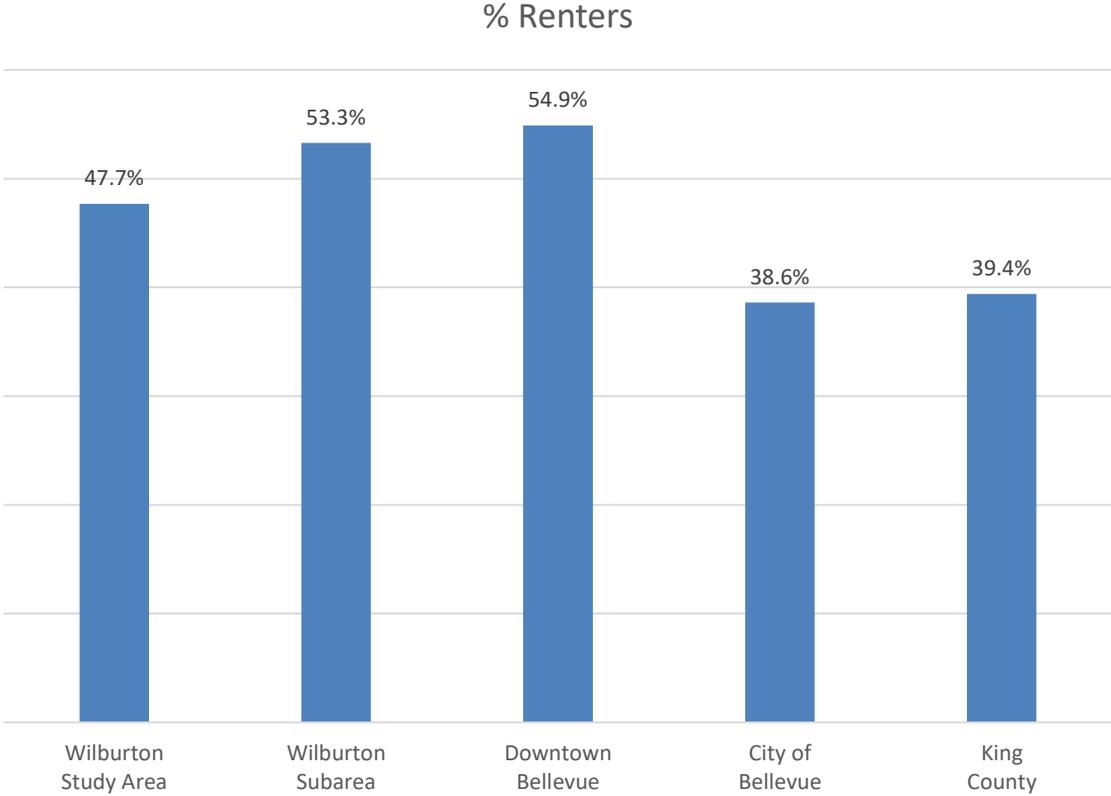
- Young adults in the 25- 34 age group are much more likely to live in Wilburton and Downtown than in the City or County as a whole.
- There are fewer young children in Wilburton and Downtown than in the City or County.



Source: ESRI Business Analyst, US Census, Leland Consulting Group.

Renters

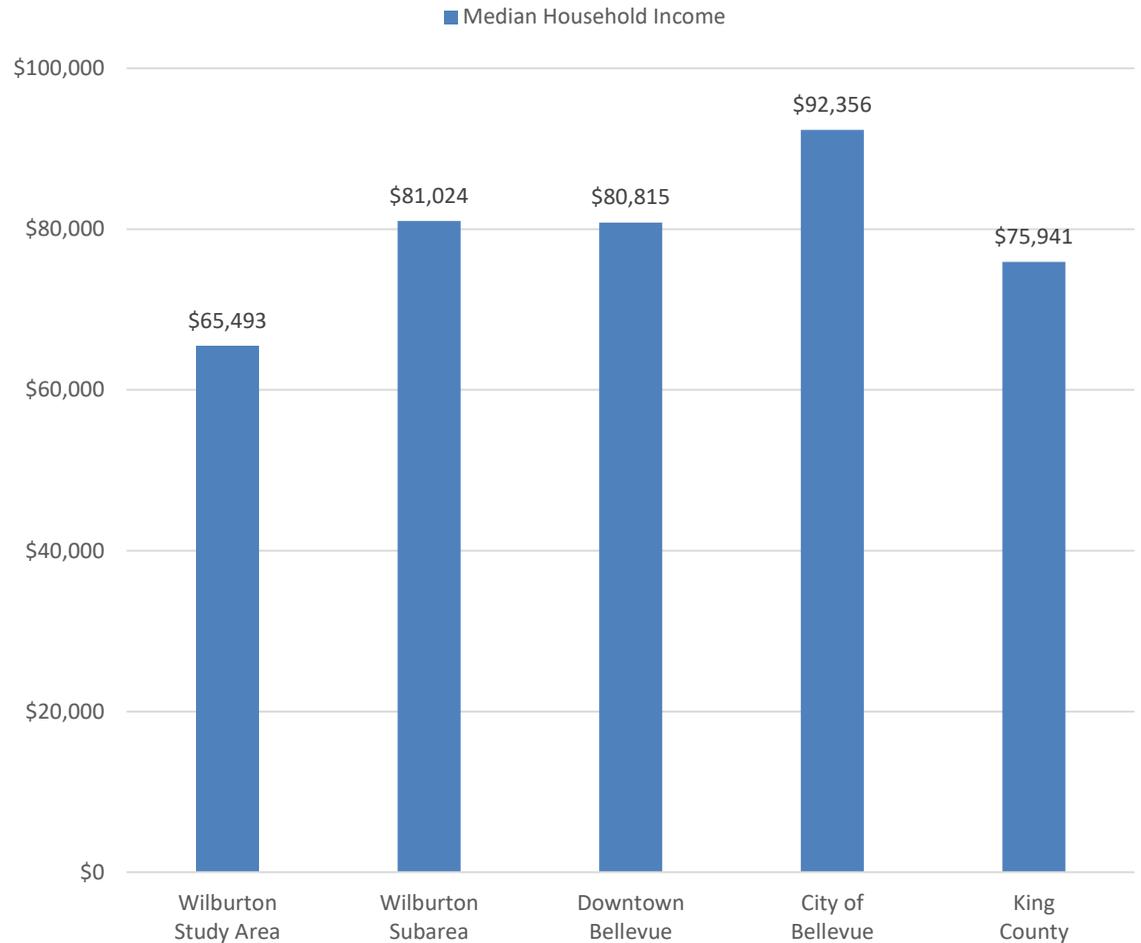
- There is a higher percentage of renters in Wilburton and Downtown than in the City and County.



Source: ESRI Business Analyst, US Census, Leland Consulting Group.

Incomes

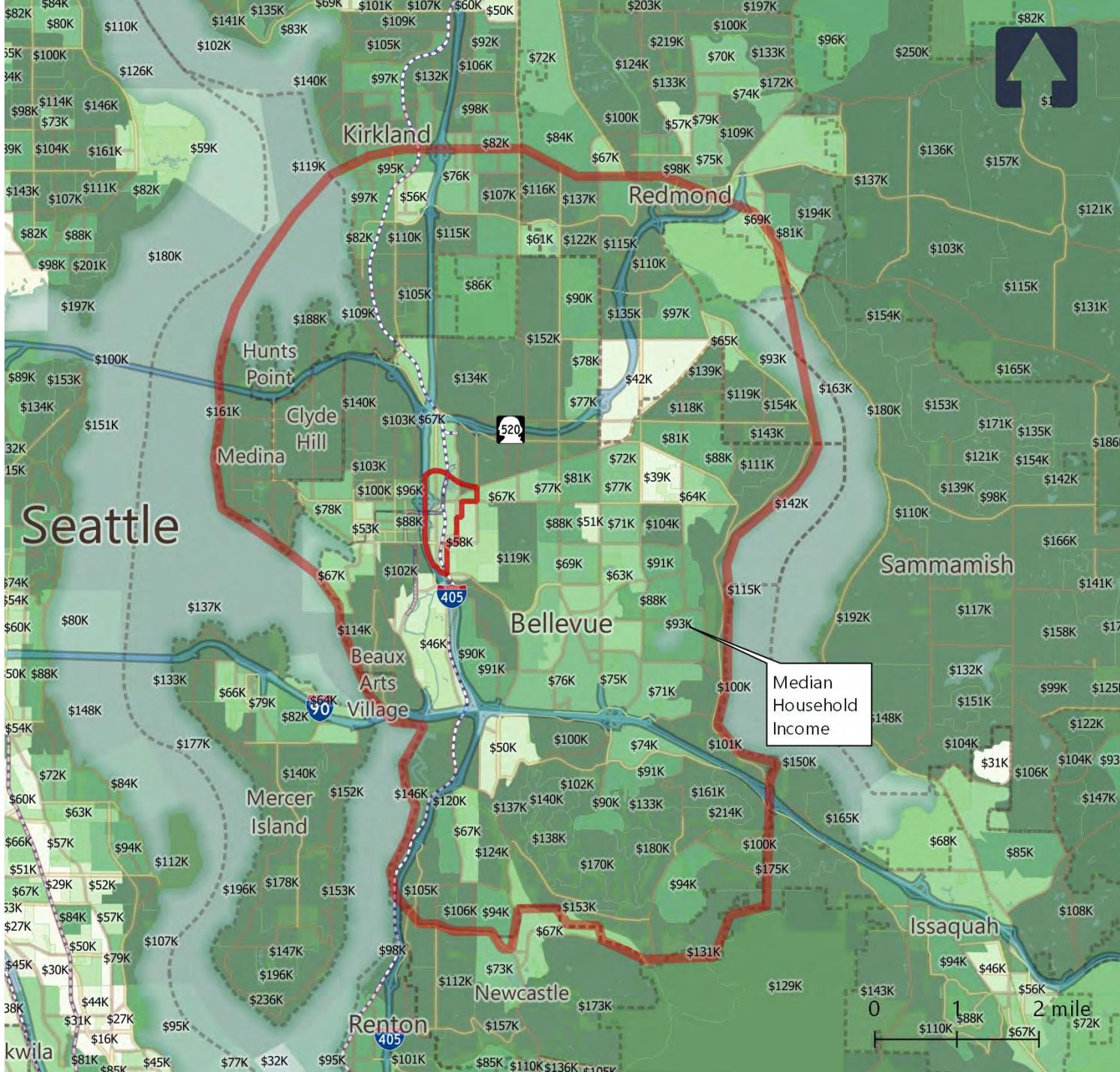
- Household incomes in the study area are lower than Downtown and the City.
- Incomes in the City are among the highest in King County.



Source: ESRI Business Analyst, US Census, Leland Consulting Group.

Household Incomes

2014 Median Household Income by Census Block Group



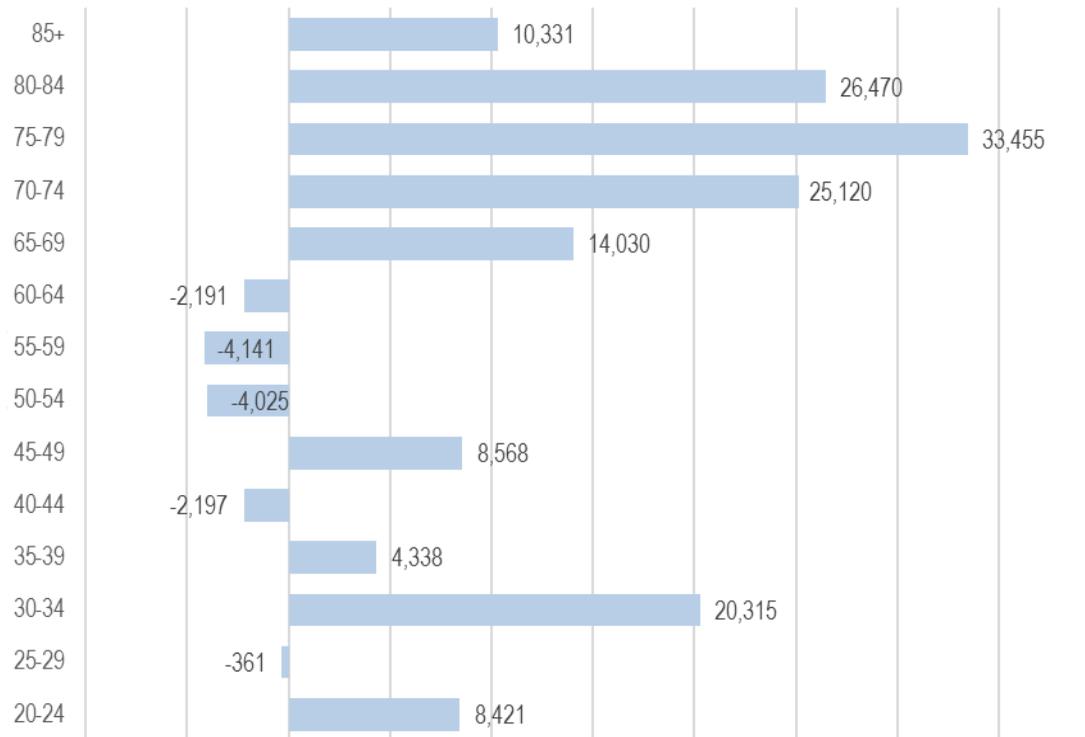
Ethnicity

Non-White Population by Race/Ethnicity, 2016	Wilburton Study Area	Wilburton Subarea	Downtown Bellevue	City of Bellevue	King County
Black Alone	3.2%	3.0%	2.8%	2.5%	6.6%
American Indian Alone	0.4%	0.4%	0.2%	0.4%	0.8%
Asian Alone	28.2%	35.1%	38.5%	31.3%	16.9%
Pacific Islander Alone	0.2%	0.2%	0.3%	0.2%	0.8%
Some Other Race Alone	2.6%	2.1%	1.5%	3.2%	4.3%
Two or More Races	4.3%	3.9%	3.5%	4.4%	5.6%
Hispanic Origin	6.7%	5.8%	5.1%	7.4%	9.8%

Source: ESRI Business Analyst, US Census, Leland Consulting Group.

Population Growth by Age Category

King County, 2015 - 2025

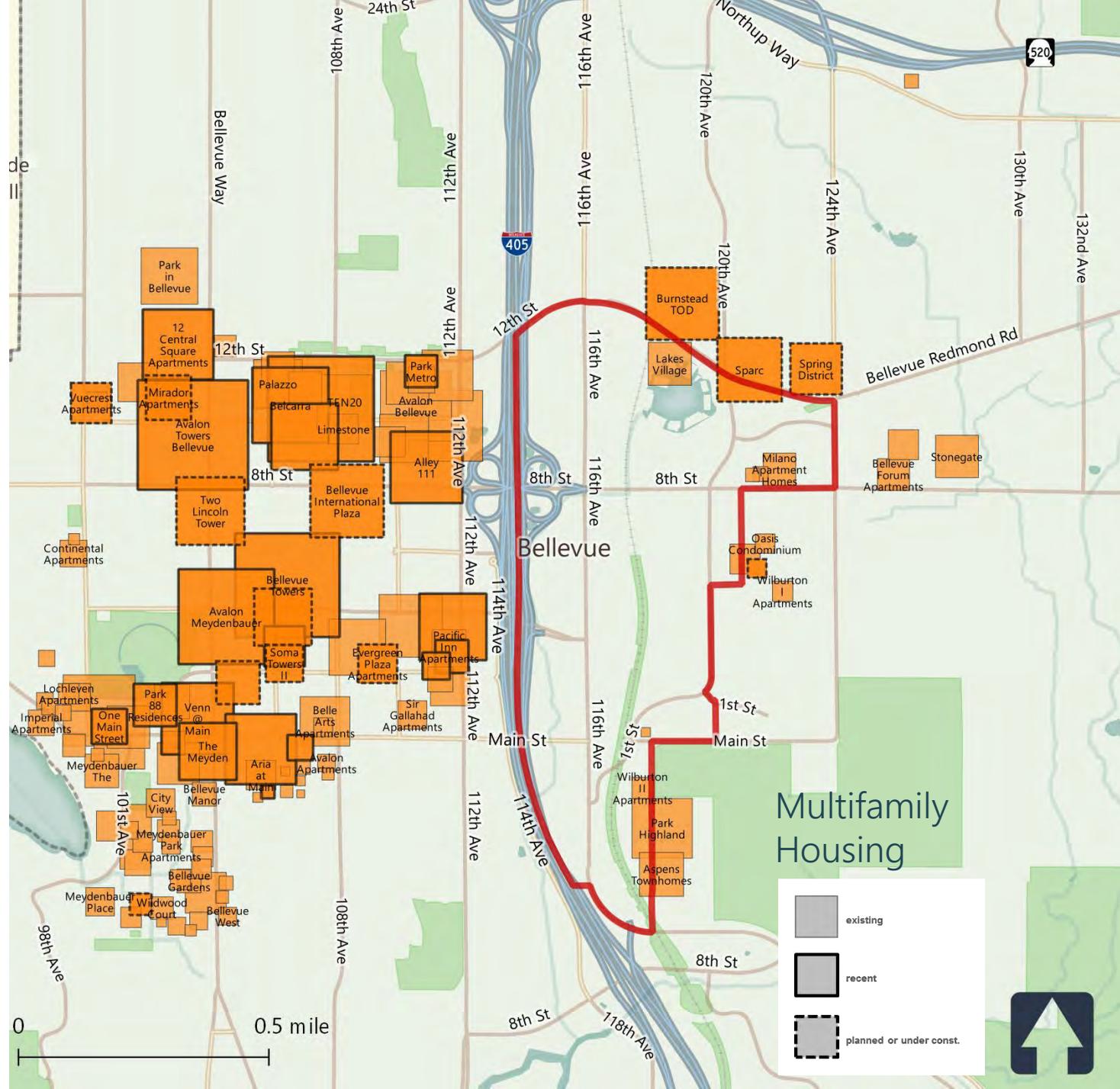


Source: OFM, State of Washington.

Housing

Apartment development has boomed in Downtown and the Spring District, but not in Wilburton.

About 4,800 apartment and condo units are under construction or planned west of 405.



Housing

Spring District

Mid Rise



The Sparc

Downtown

High Rise

Luxury market



Two Lincoln Tower
700 Bellevue Way NE

20-Year Housing Demand Forecast

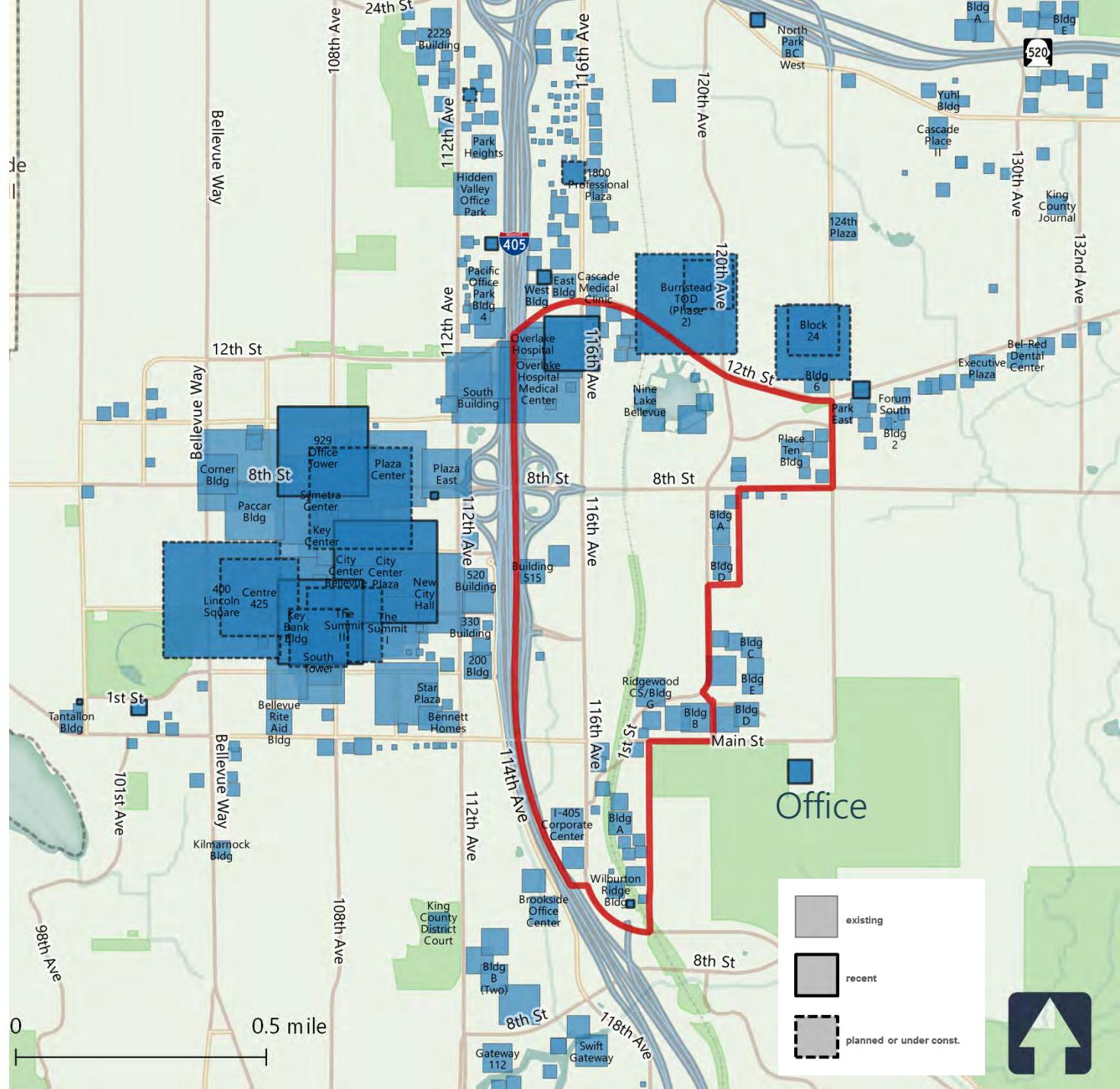
Housing Type	Market Area Demand	Study Area Capture Rate	Study Area Development	
			Low	High
Single Family Detached	5,000	0 to 0%	-	-
Rental Apartments	10,600	20 to 26%	2,120	2,760
Attached Ownership (Townhome, Condo, Plex)	7,600	18 to 23%	1,360	1,740
Total Units	23,200	15 to 19%	3,480	4,500

ULI Estimate 3,600

Office

Large-scale office projects have been built in Downtown, and several are proposed for the Spring District.

Most office space in Wilburton is smaller, and on the fringe of the district.



Office



UW,
Microsoft,
Tsinghua
University



Bellevue



REI



Google

Office Migration to Urban Locations

“General Electric stunned many when it announced that it would relocate its headquarters in Boston, after being in suburban Fairfield, CT, since 1974.

GE wanted to move to a place that had a walkable urban environment and access to transit... in a vibrant, innovative environment that would be stimulating to workers.”

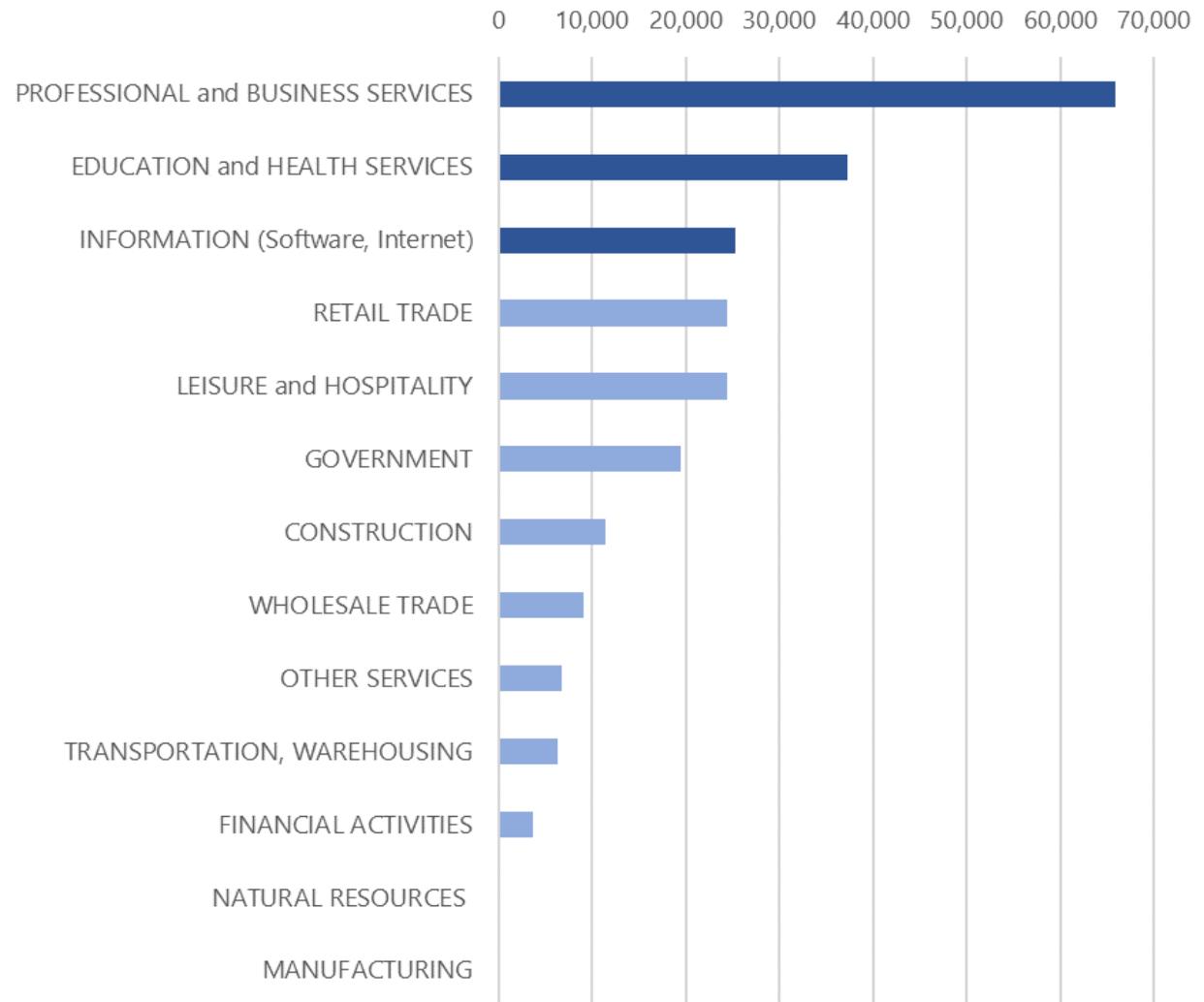
—Forbes

<http://www.forbes.com/sites/petesaunder1/2016/04/19/business-goes-where-talent-flows/#1ad64f665d63>



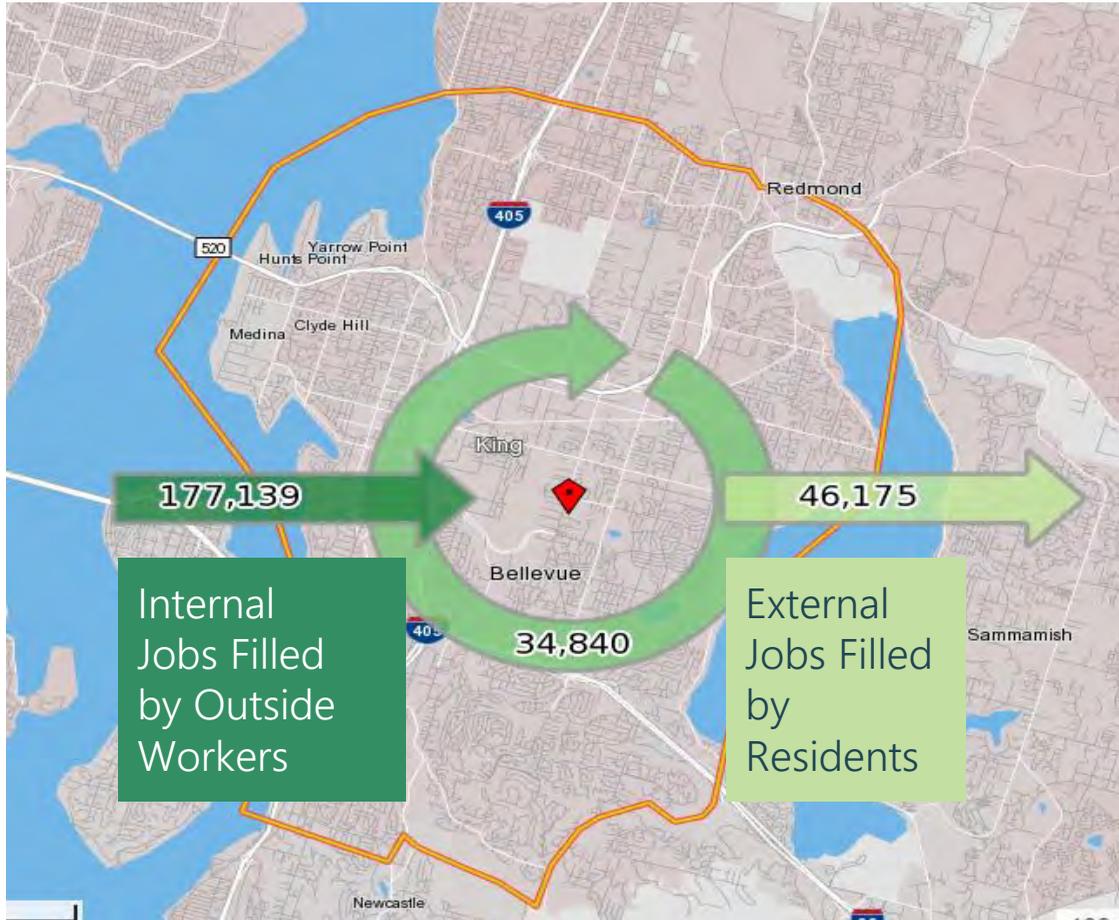
Job Growth, King County, 2014 - 2024

King County is projected to add approximately 230,000 jobs between 2014 and 2024—within industry sectors that Wilburton is well positioned to capture.



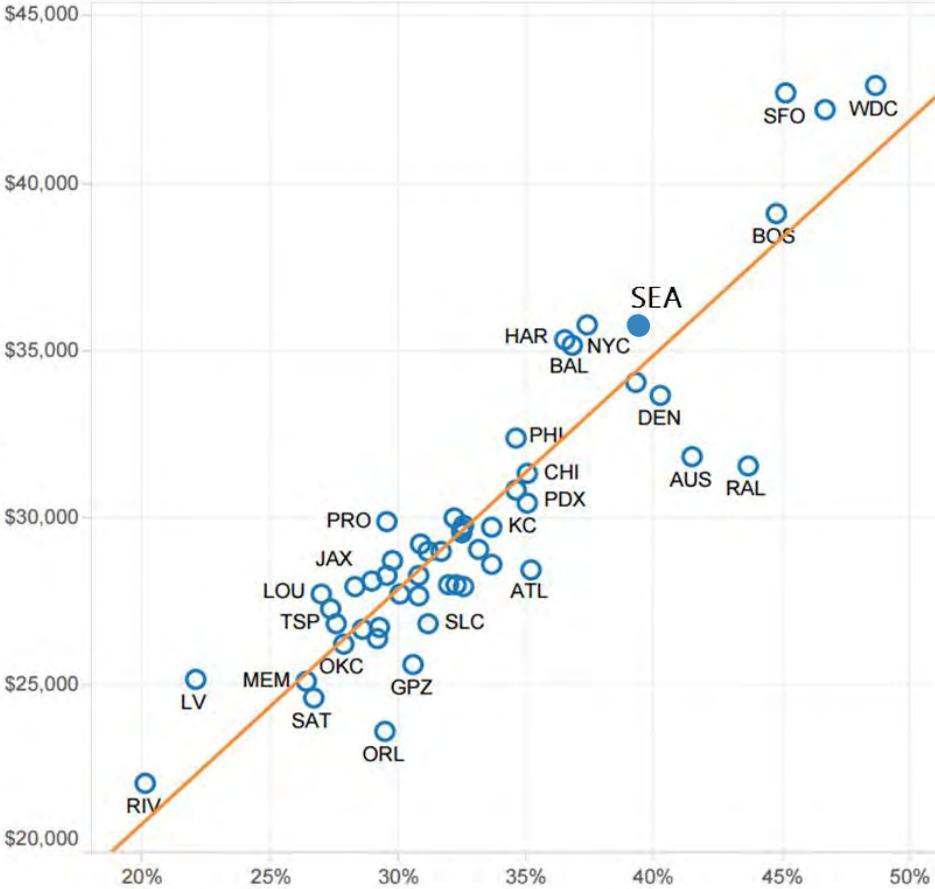
Employment

The market area is a major employment center.



Education and Expertise Drive Prosperity

Prosperity
(Per Capita Income)

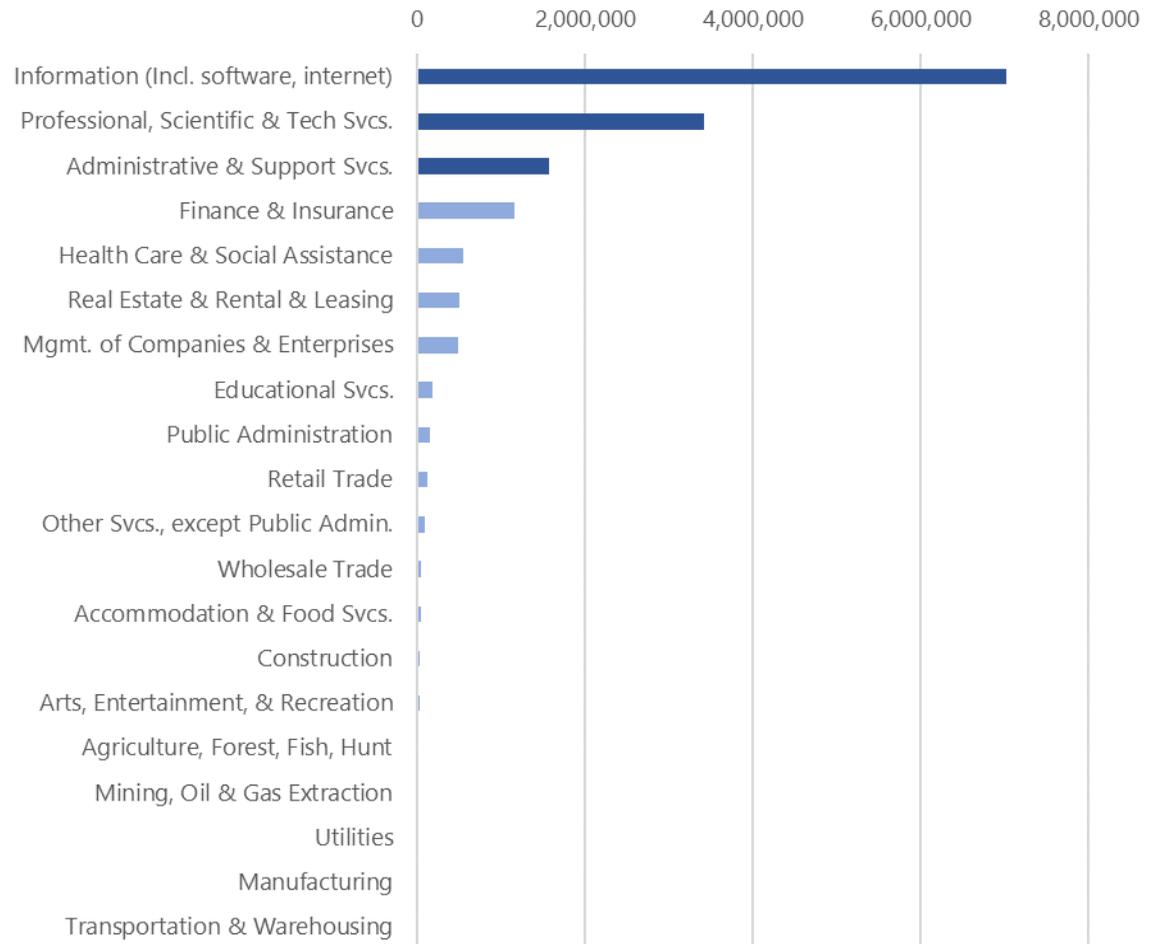


Education (Percent of Adults with College Degree)

Source: ACS, BEA, City Observatory.

Office Demand by Sector, Market Area, 20 Years

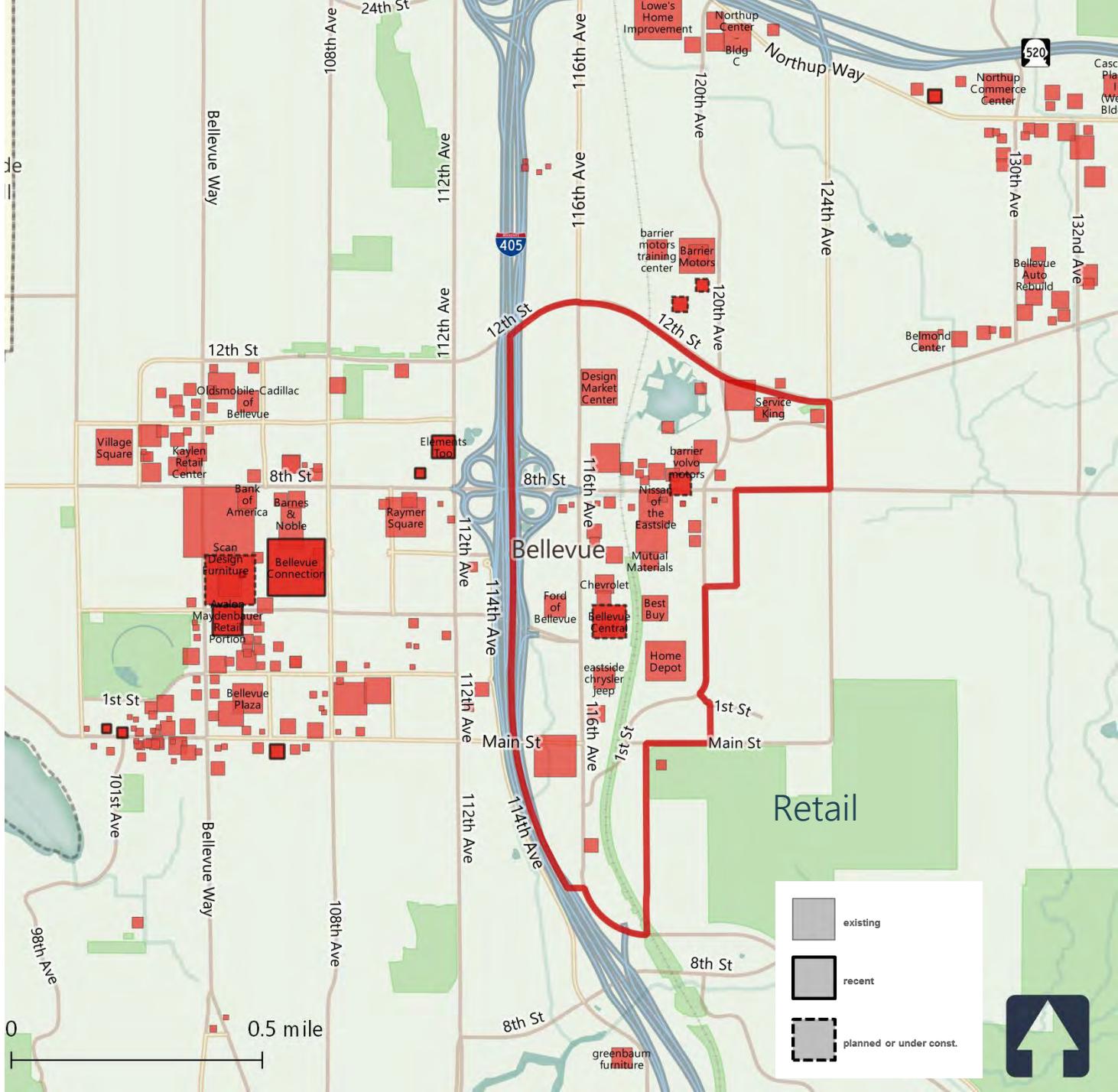
We anticipate approximately 15 million SF of new office development within the market area over the next two decades.



20-Year Office Demand Forecast

Market Area Demand (SF)	15,200,000
Study Area capture rate	
Low	12%
High	20%
Study Area Demand (SF)	
Low	1,800,000
High	3,000,000
ULI Estimate	3,200,000

Retailers and auto dealerships dominate much of Wilburton.



Retail

Uwajimaya is one retailer that expresses Wilburton's distinctive ethnic makeup.



Grocers:

- Uwajimaya
- Whole Foods
- Trader Joes
- Other TBD



Eating, drinking, and connecting with fresh food is the ultimate retail and sensory experience.



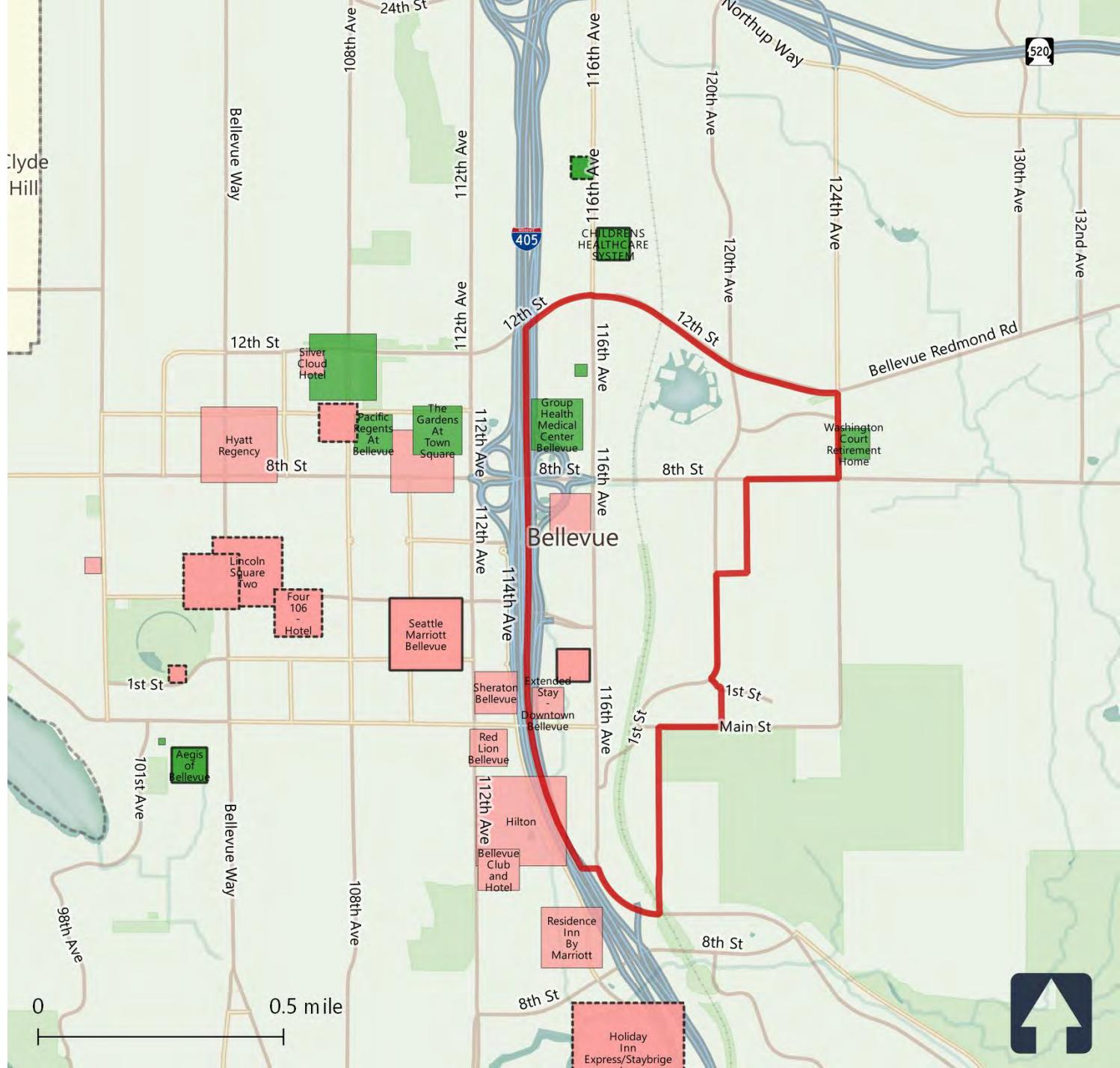
"Placemaking is not sustainable without food and beverage." –CBRE

20-Year Office Demand Forecast

Market Area Demand (SF)	4,400,000
Study Area capture rate	
Low	9%
High	16%
Study Area Demand (SF)	
Low	416,000
High	722,000
ULI Estimate	1,260,000

Several major healthcare institutions are located in Wilburton.

Most of Bellevue's lodging is located west of 405.



Wilburton's assets—healthcare, multiple new active transportation facilities, and numerous grocery stores—create an opportunity for a district that promotes health and wellness.

"Healthy places can create enhanced economic value for both the private and public sectors."—ULI



“Healthy Corridors”

Improved infrastructure

- » Frequent, safe, and well-marked pedestrian crossings
- » Safe and well-marked bike lanes
- » Traffic speeds that accommodate pedestrians, bicyclists, and other users
- » Reduced traffic congestion
- » Utility lines and traffic signs and signals that are underground or that blend in
- » Sidewalks that link adjacent neighborhoods to the corridor and that are unobstructed, wide enough for a variety of users, and buffered from the street
- » Streetscapes that include amenities for visual interest and safety, including seating, trees for shade, and green buffers
- » Lighting that improves visibility and safety for pedestrians and bicyclists
- » Features that improve accessibility for all types of users, in compliance with Americans with Disabilities Act standards

Design and land use patterns that support community needs

- » Vibrant retail environment
- » Housing options for all income levels
- » Buildings adjacent or proximate to sidewalks
- » Improved parking strategies and shared parking
- » High-quality parks and public spaces
- » Healthy food options

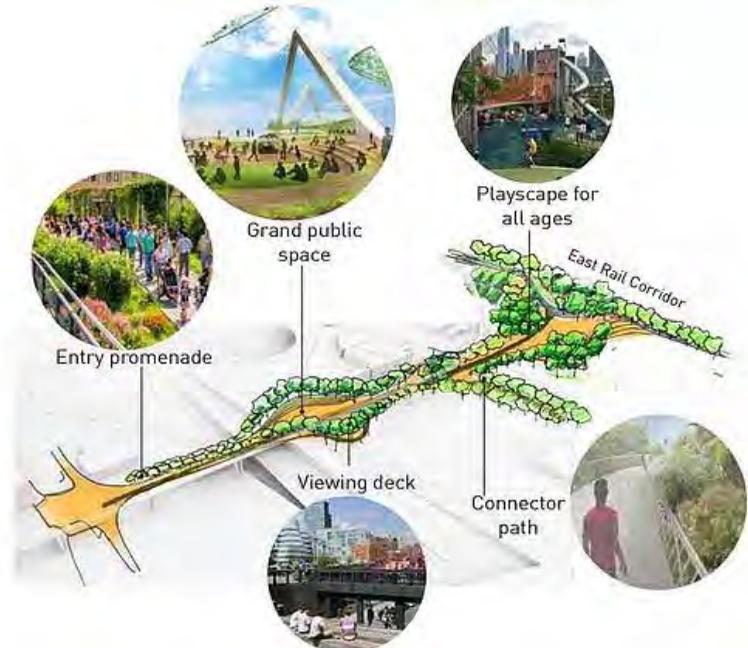
Engaged and supported people who live, work, and travel along the corridor

- » Engaged residents and local business owners
- » Organizations that facilitate long-term improvements and resident engagement
- » Regular programs in community gathering spaces
- » Accommodations for pets
- » Accommodations for vulnerable populations, including children, the elderly, and people with disabilities
- » A defined identity, drawing on the arts and culture of the community and supported by creative placemaking programming
- » Measures to address safety and perceptions of safety

Linkages to other parts of the city

- » Well-connected, multimodal street networks
- » Safe and easily identifiable connections, including sidewalks and trails
- » Transit, including enhanced bus service or rail
- » Bike infrastructure on or adjacent to the corridor

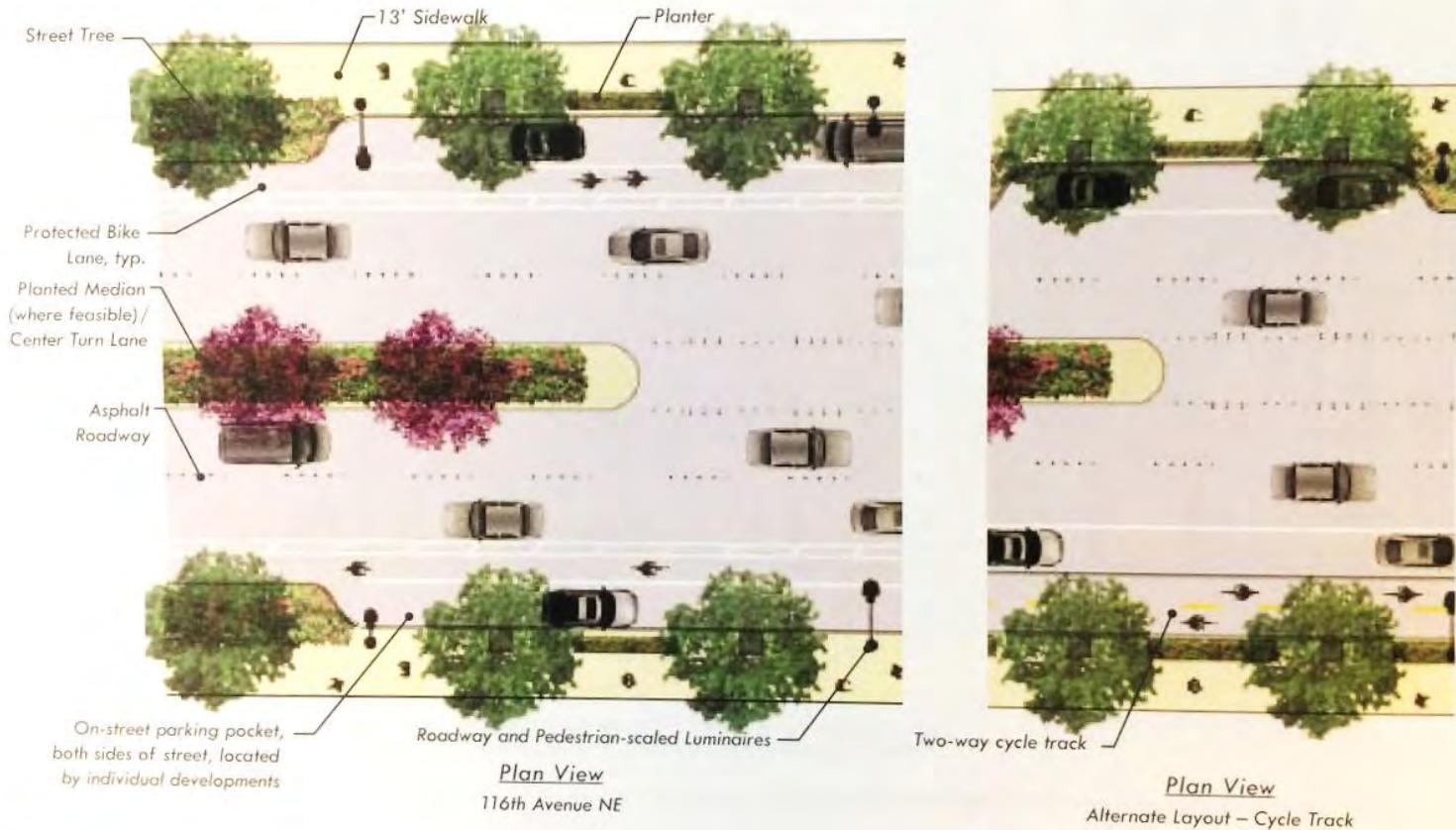
"Planning should be defined as 'public action that generates a sustained and widespread private market reaction.'"
–Alexander Garvin



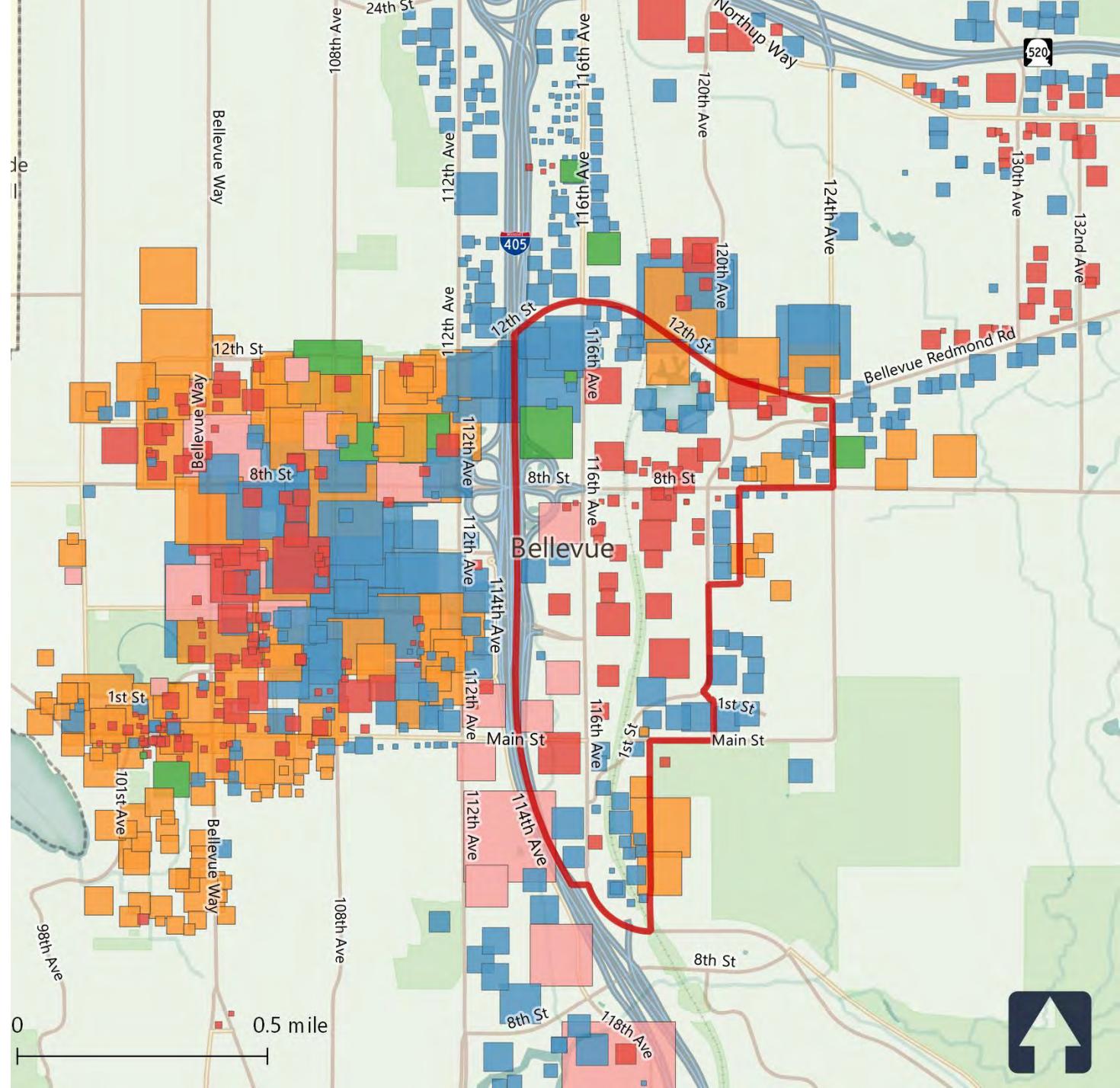
Public action that generates a private market reaction.

CONCEPTUAL 116TH AVE NE STREETScape

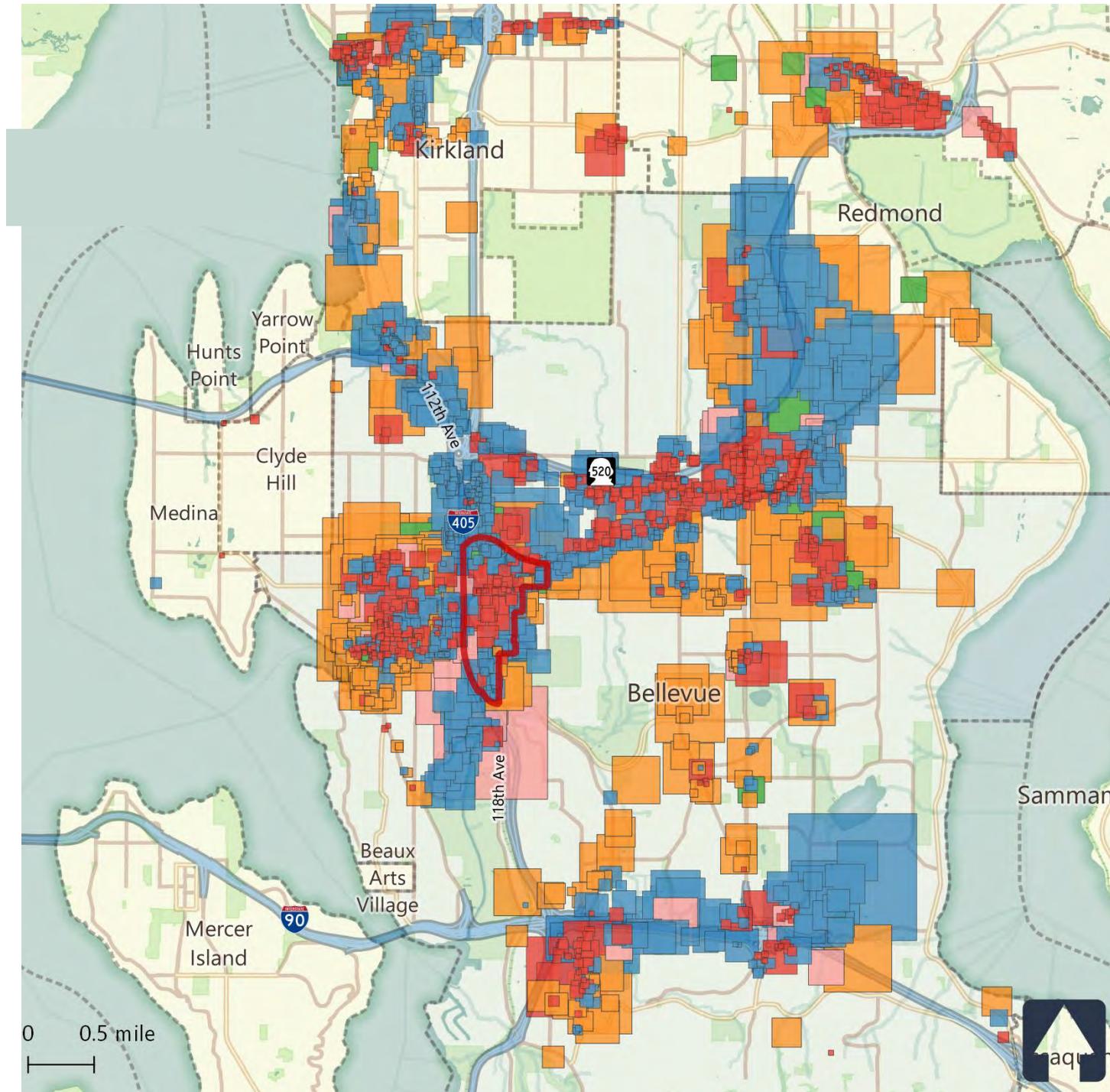
An alternate streetscape layout is to incorporate a two-way cycle track rather than buffered bike lanes, which would reduce the cross section of the road. In both cases, the design speed should reflect the posted speed to make the streetscape as safe and friendly as possible.



While Downtown Bellevue is mixed-use, Wilburton is a largely auto-oriented retail district that is in the “path of growth.”



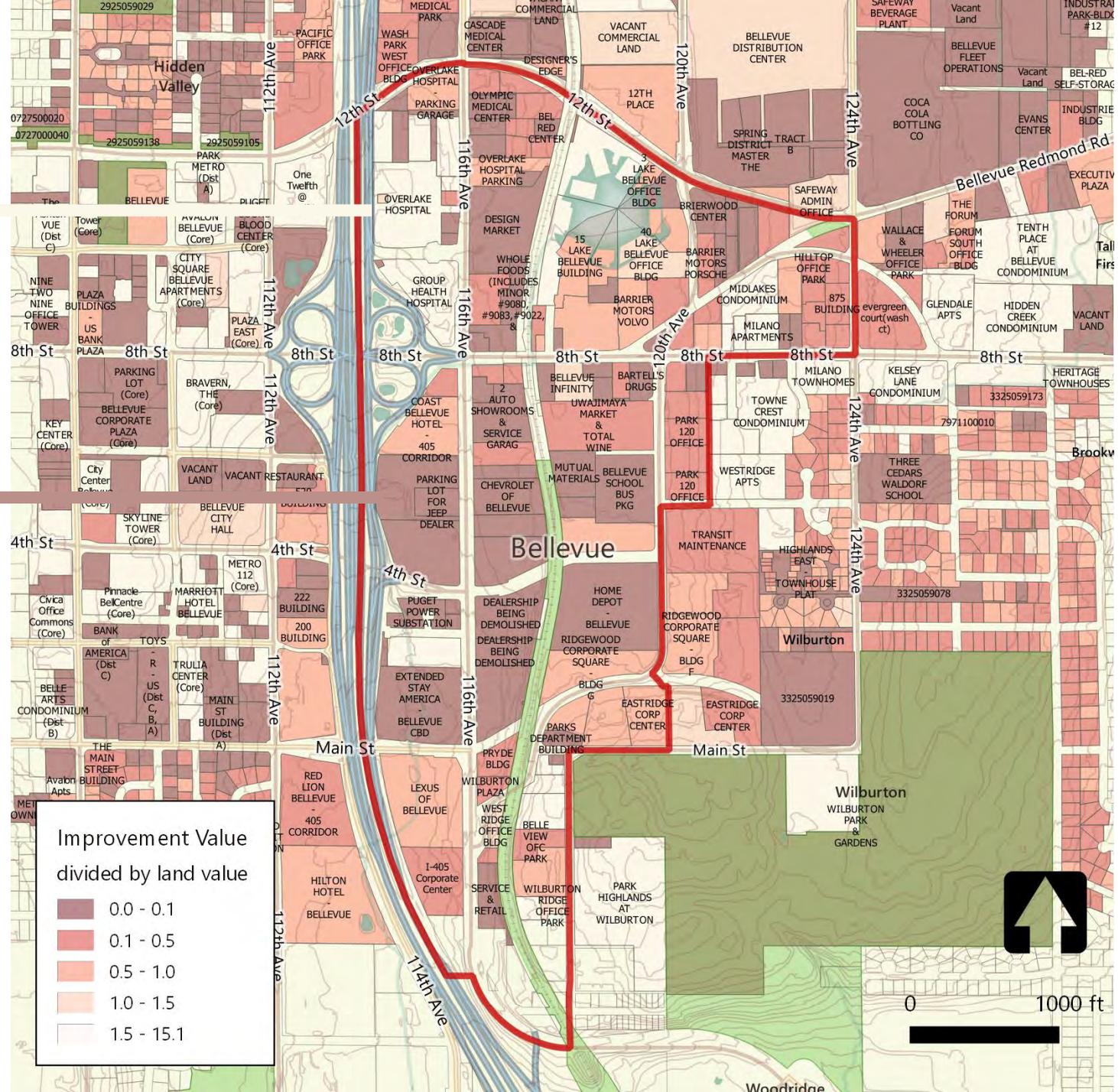
Wilburton is located at the intersection of two major high growth corridors: Bel-Red and 405.



Redevelopment Potential

Some properties are more likely to remain as is.

Some properties are more likely to redevelop.



**Are these the
right goals?**

**Are they
feasible?**

Authentic

A Great Urban Neighborhood

Connected & Pedestrian Friendly

Active & Healthy

Affordable

Different from Downtown

Diverse and Multiethnic

Technology and Entrepreneurism

Special Opportunity Area

WILBURTON CASE STUDIES

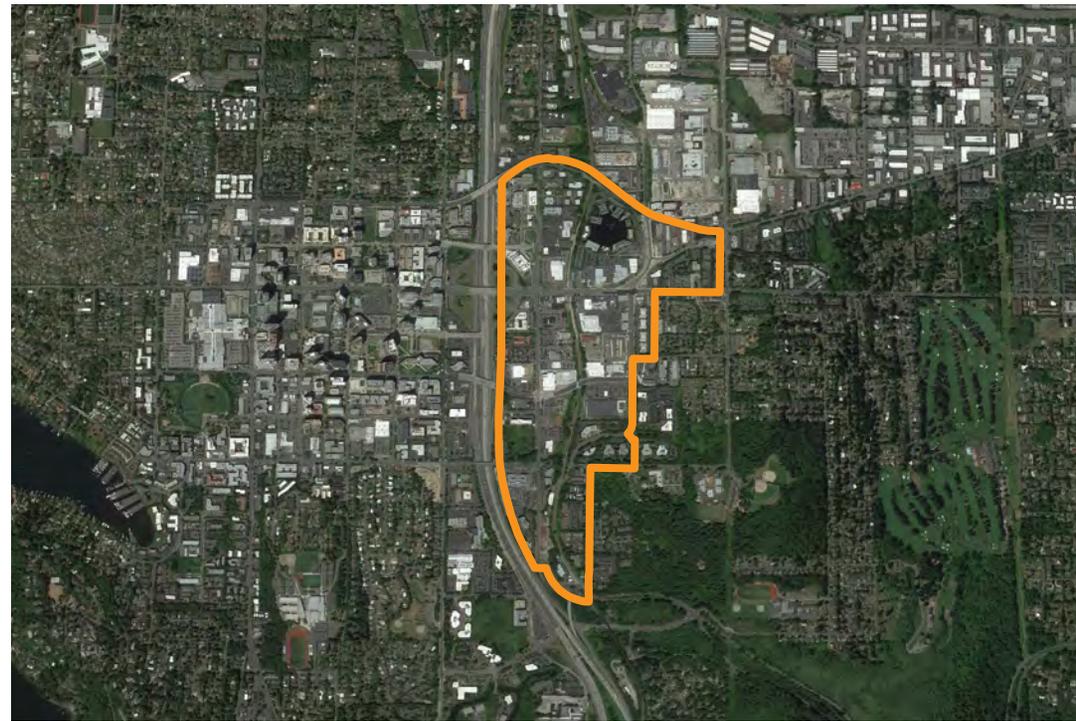
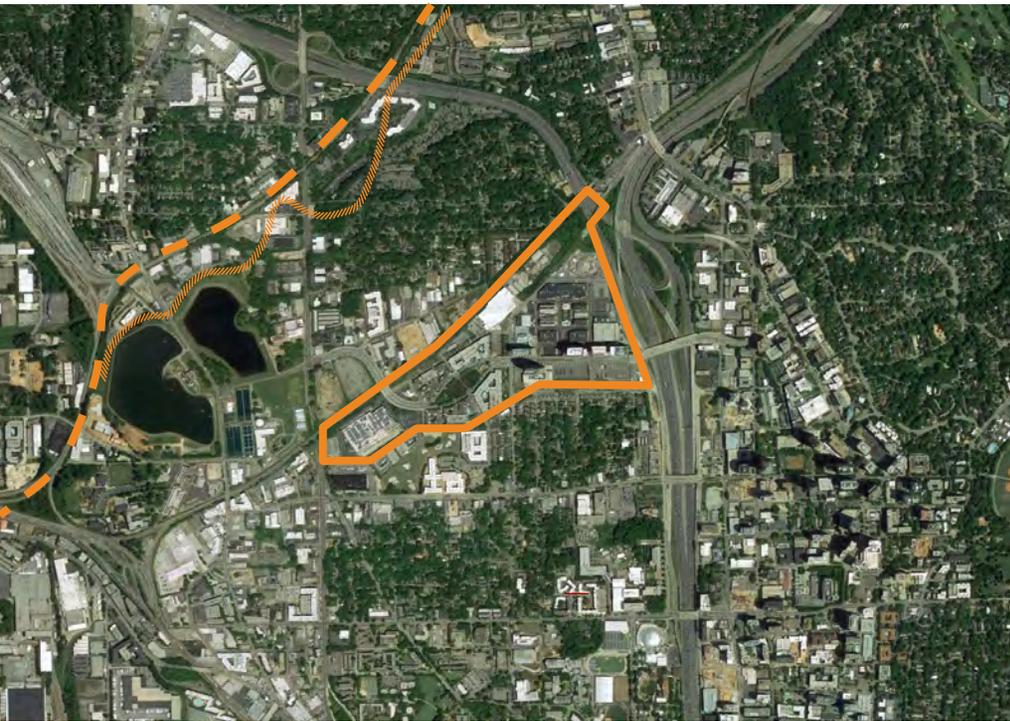


ATLANTA

ATLANTIC STATION BELTLINE



Overview



ATLANTIC STATION, ATLANTA, GA
~150 ACRES

WILBURTON STUDY AREA, BELLEVUE, WA
~300 ACRES

KEY FACTS



ATLANTIC STATION

- Opened 2005
- Built on a former site of Atlantic Steel (brownfield remediation site)
- Multimodal bridge over I-75 and I-85 to connect to Midtown Atlanta
- 12 Million Square Feet Of Retail, Office, Residential & Hotel Space
- 11 Acres Of Public Parks
- Comprised of three districts just NW of Midtown Atlanta. (The District, The Commons, and The Village)

- 3.5 miles to Downtown Atlanta

BELTLINE

- Sustainable redevelopment project
- It will ultimately connect 45 intown neighborhoods
- 22-mile loop of multi-use trails, modern streetcar, and parks – all based on former railroad corridors
- Supports affordable workforce housing, economic development, job creation, public health, streetscapes, public art, environmental clean-up, and historic preservation

RELATIONSHIP TO WILBURTON



ATLANTIC STATION

- Close to Midtown Atlanta, Georgia Institute of Technology
- Adjacent to major freeway
- New bridge connection over freeway provides access to light rail (3/4 mile walk)
- Re-envisioned Industrial Area
- Potential trail connection (Atlanta Beltline)
- Access to light rail
- Incorporates 'big box' retail and high-rise Class A office buildings (22+ stories)
- Mixed-use (Office, Residential, Retail, Hospitality)

BELTLINE

- Rail-to-Trail
- Economic development around trail and transit

More Information:

- [Atlantic Station](#)
- [Beltline](#)

PLAN FOR A HEALTHY LOS ANGELES



OVERVIEW

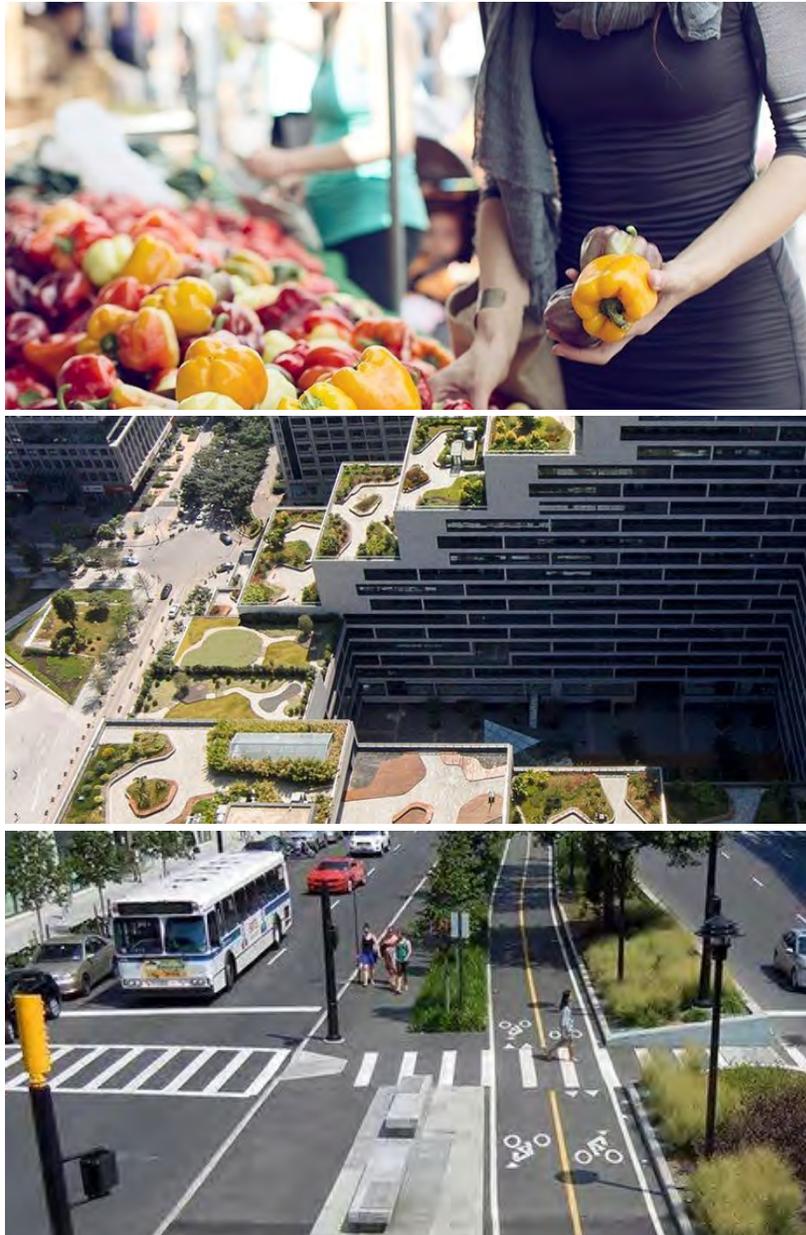


- Element of the General Plan
- Provides high-level policy vision, along with measurable objectives and implementation programs
- Elevates “health” as a priority for the City’s future growth and development
- The Plan for a Healthy Los Angeles provides a roadmap for addressing the most basic and essential quality-of-life issues:
 - * Safe neighborhoods
 - * A clean environment
 - * Access to health services
 - * Affordable housing
 - * Healthy and sustainably produced food
 - * Opportunity to thrive

More Information:

- [Plan for a Healthy Los Angeles](#)

POLICY & GOALS



- The Plan acknowledges the relationship between public health and issues such as;
 - * Transportation
 - * Housing
 - * Environmental justice
 - * Open space (parks) - among others
- 7 goals, each goal includes supporting objectives to track improvements to community health:
 1. Los Angeles, a Leader in Health and Equity
 2. A City Built for Health
 3. Bountiful Parks and Open Spaces
 4. Food that Nourishes the Body, Soul, and Environment
 5. An Environment Where Life Thrives
 6. Lifelong Opportunities for Learning and Prosperity
 7. Safe and Just Neighborhoods

BATON ROUGE

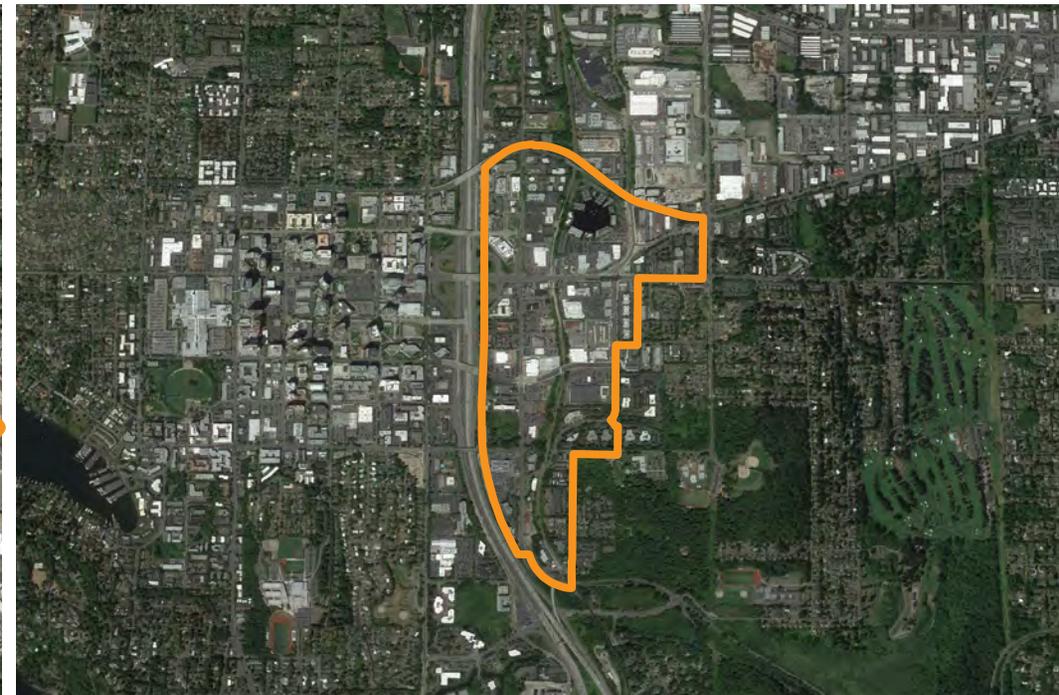
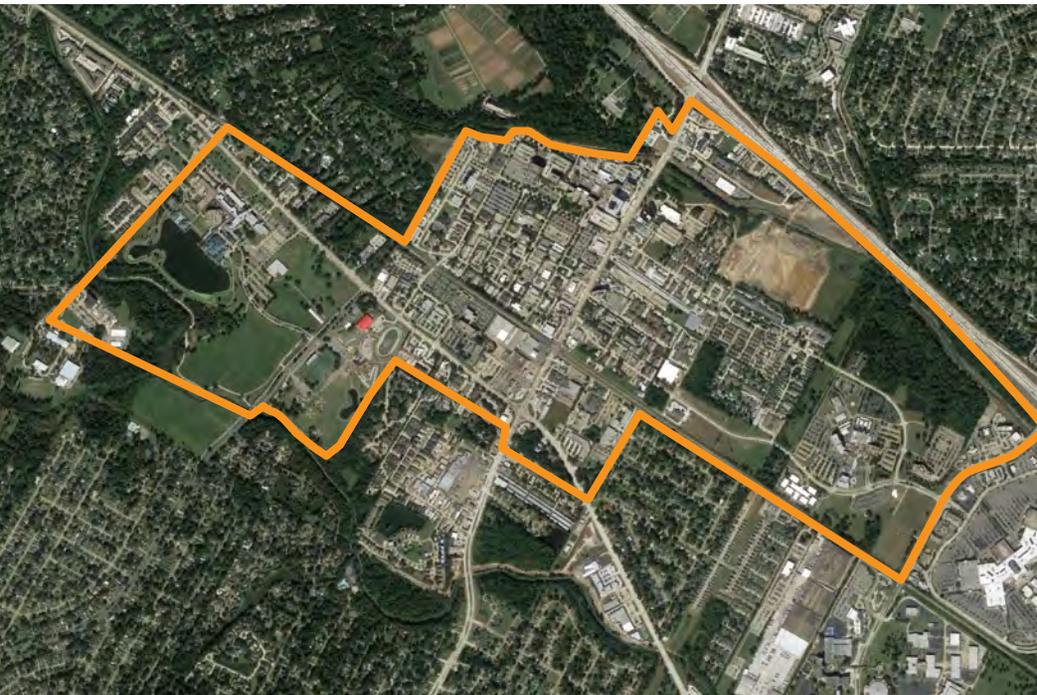
HEALTH DISTRICT



Overview



• BATON ROUGE, LA



BATON ROUGE HEALTH DISTRICT, BATON ROUGE, LA
~1,100 ACRES

WILBURTON STUDY AREA, BELLEVUE, WA
~300 ACRES

KEY FACTS

HEALTHY PLACE RECORD	
DIAGNOSIS	
 CHIEF COMPLAINT	Acute Congestion on Arterial Roads
 KEY SYMPTOMS OBSERVED	<ol style="list-style-type: none">1. Inefficient Transportation Network2. Weak Alternatives to the Car3. Poor Access to Parks and Open Spaces4. Uncoordinated, Sprawling Development
 VITAL SIGNS	40,000+ Cars / Day on Major Arterials Only 25 Street Intersections Per Square Mile Only 20% Sidewalk Coverage on District Streets
 ASSESSMENT	Auto-oriented sprawl is bad for business, health, and the business of healthcare.
TREATMENT PLAN	
 PRIORITY INTERVENTIONS	Build the District Street Network. Build the Health Loop Trail.
 PRESCRIPTIONS	<ol style="list-style-type: none">1. Create connections for efficient circulation and access.2. Enable people to walk, bike, and take transit.3. Connect to parks and open spaces.4. Promote balanced, diverse, and orderly development.
 FOLLOW-UP TESTS (ANNUAL CHECK UP)	Travel Speed on Arterials Pedestrian and Bicyclist Counts Employee Travel Behavior Survey
 EXPECTED OUTCOME	An Efficient, Safe, and Pleasant Place for All

25

- Health District > Medical District
- Place-based health collaborative, made up of 8 different healthcare related organizations
- Plan to change built environment and shift the culture
- Examines district in four categories:
 - * Healthy Place
 - * Health Education + Research
 - * Healthcare Innovation
 - * Resiliency + Disaster Preparedness
- Plan “diagnoses symptoms” (existing conditions) and provides “treatment plan” (recommendations and performance measures)
- Strong focus on non-motorized transportation improvements

RELATIONSHIP TO WILBURTON



- Healthcare as catalyst for change (district wide influences)
- Large healthcare employee base
- Focus on street infrastructure, pedestrian safety and multi-modal connections
- Future light rail connections (less dependency on the motor vehicle)
- Multiple healthcare providers / medical office users teaming for overarching goal of healthy communities.

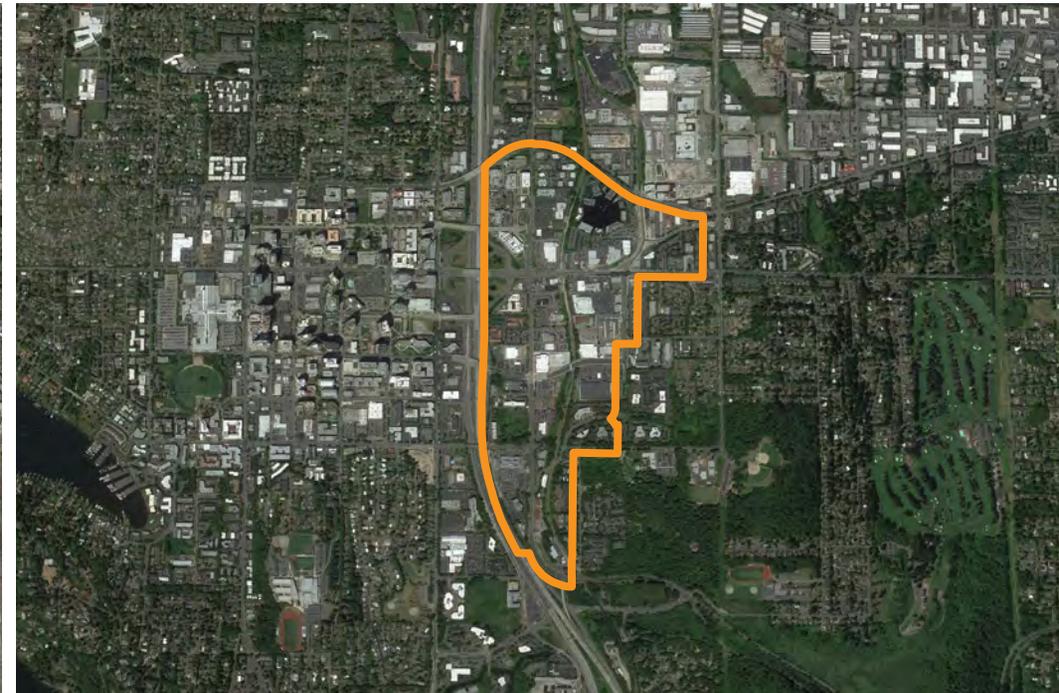
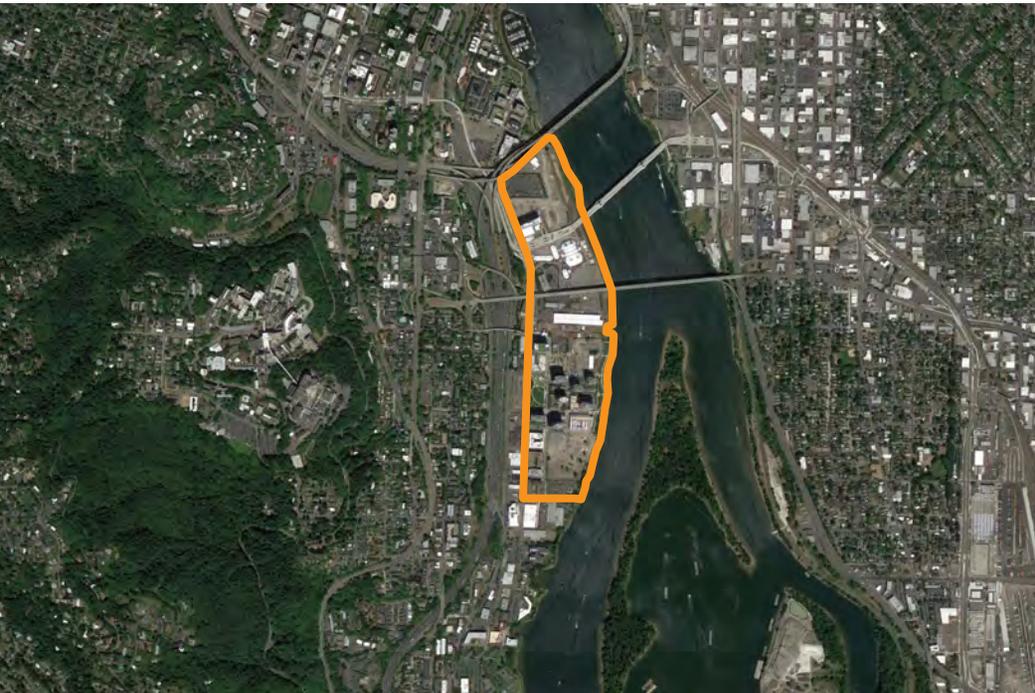
More Information:

- [Master Plan for the Baton Rouge Health District](#)

SOUTH WATERFRONT ECO-DISTRICT



Overview



SOUTH WATERFRONT ECO-DISTRICT, PORTLAND, OR
~120 ACRES

WILBURTON STUDY AREA, BELLEVUE, WA
~300 ACRES

KEY FACTS



- 'Eco-District' forms a connecting thread throughout the district
 - Sustainable economic strategies
 - Local-owned businesses
 - Sustainable Best Practices
 - Diversity / Equity
- Targeted as a mixed-use central city neighborhood in 1999 with the establishment of an Urban Renewal Area
- Focus on reconnection of city to waterfront
- Infrastructure designed for humans (woonerf streets, open green space, parks, and a greenway)
- Goal to build timeless spaces to avoid need for redevelopment
- Stormwater filtration system throughout, wildlife habitat along waterfront
- LEED-ND (integrates principles of smart growth, urbanism, and green building) rated neighborhood
- Serviced by aerial tram, streetcar, light rail, bikeways, walking trails, and pedestrian and transit bridges.

RELATIONSHIP TO WILBURTON



- Adjacency to major interstate
- Movement away from prior uses (industrial / commercial) to create something different
- Unique opportunity to brand the place (placemaking strategy)
- Connections to neighborhood and city center by light rail
- Direct connection to Oregon Health Science University district by tram

More Information:

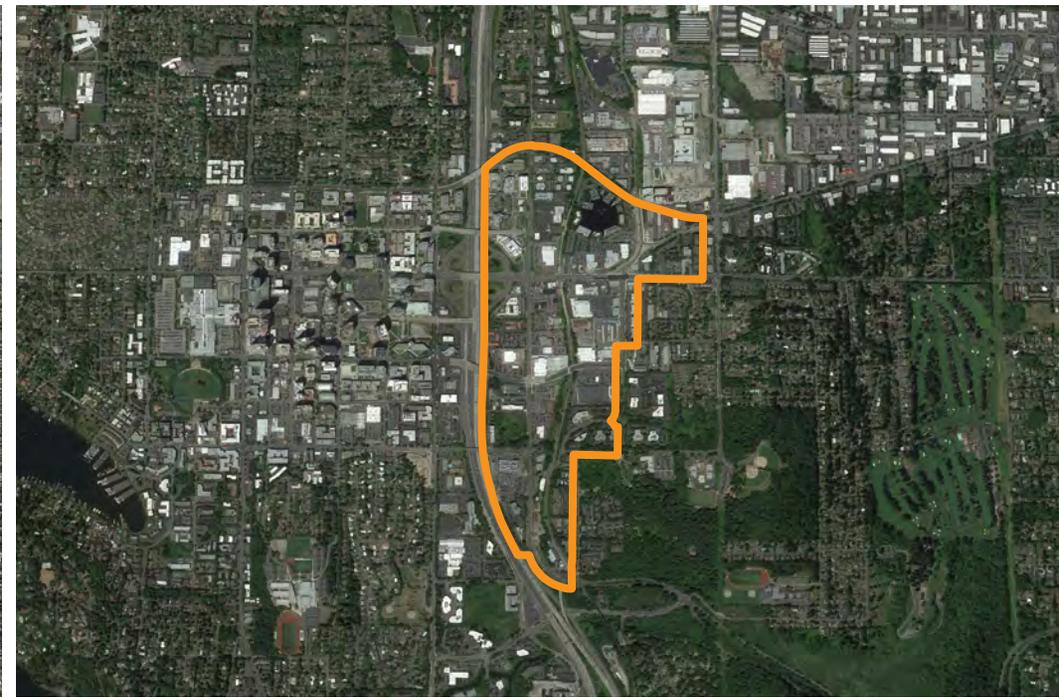
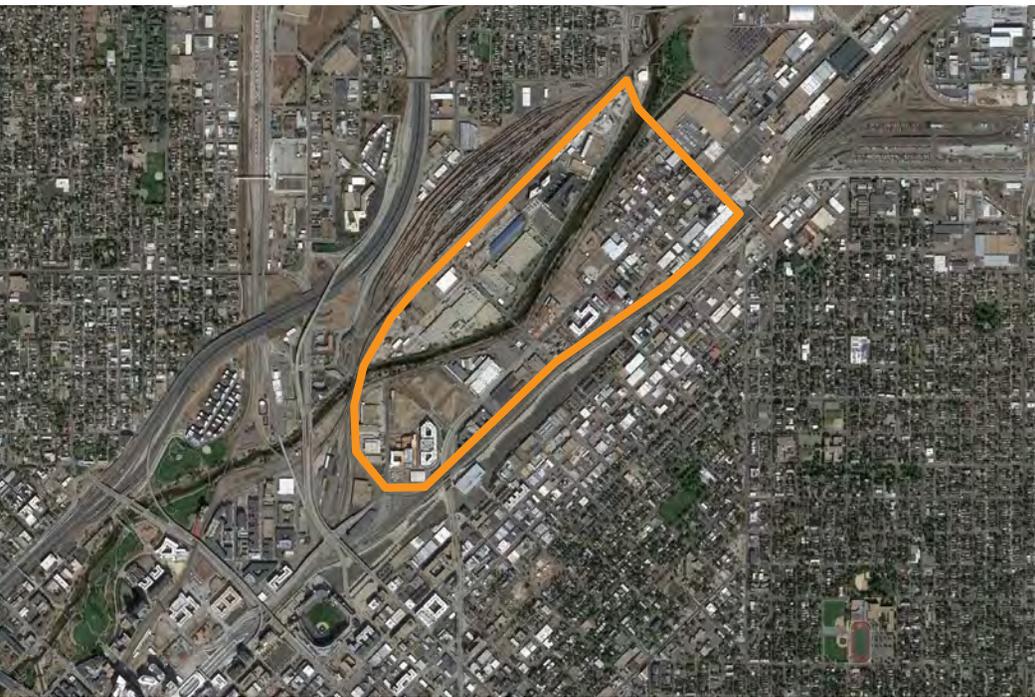
- [Portland South Waterfront EcoDistrict](#)

RiNo

ARTS DISTRICT



Overview



RiNo ARTS DISTRICT, DENVER, CO
~300 ACRES

WILBURTON STUDY AREA, BELLEVUE, WA
~300 ACRES

KEY FACTS



- Located just north of downtown Denver
- Former railyards / industrial / commercial hub
- Artists moved to the area in the 80's & 90's w/ decline of industrial uses
- Creative businesses; architects, designers, artists (sculptors, illustrators, mixed media), gallery space, furniture makers, represent an array of studio spaces
- Taxi Building (Phase I) / Drive Building (Phase 2) initiated a cluster of artists and creatives working in the area



RELATIONSHIP TO WILBURTON



- Transitional commercial (industrial) area
- Located near downtown
- Physically separated from downtown (major freeway (Wilburton) and river (RiNO District))
- Potential special opportunity area - artist as economic and development driver
- Potential for groundswell movement to create unique placemaking opportunity
- Mixed-use and incubator spaces for small businesses serve as catalyst for redevelopment

More Information:

- [RiNo Arts District](#)

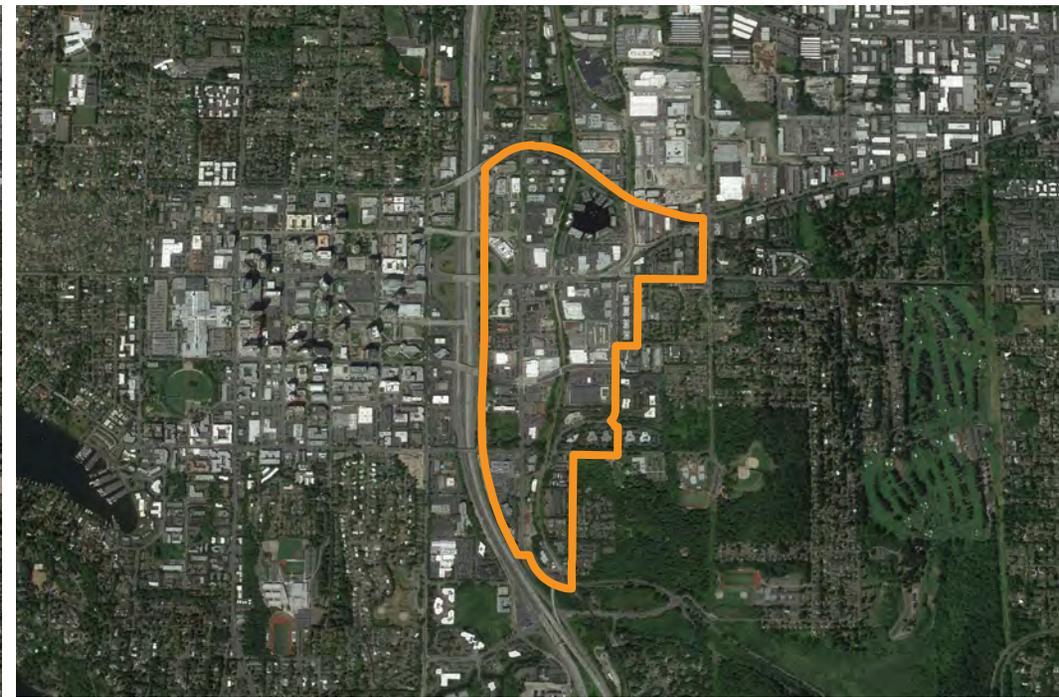
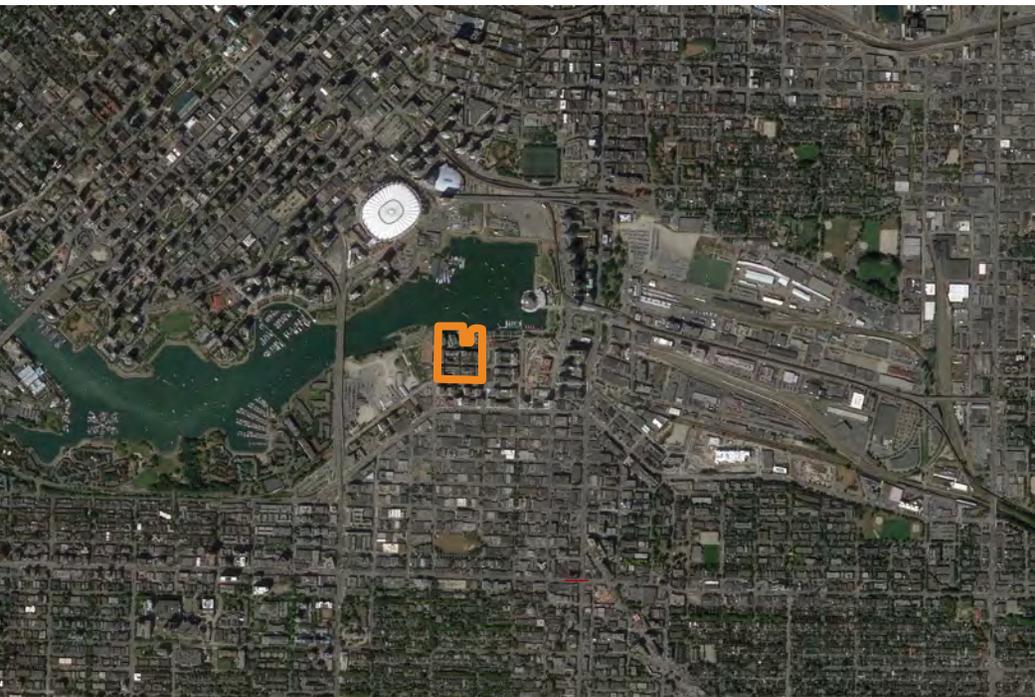
VANCOUVER

OLYMPIC VILLAGE



Overview

• VANCOUVER, BC



OLYMPIC VILLAGE, VANCOUVER, B
~18 ACRES

WILBURTON STUDY AREA, BELLEVUE, WA
~300 ACRES

KEY FACTS



- Built for 2010 Winter Olympic Games
- One of the greenest communities in the world
- LEED Gold for all buildings
- Mixed-use community
- Approx. 1,100 residential units, ~ 33% affordable
- Core of the Southeast False Creek neighborhood
- Manmade Habitat Island is an urban sanctuary along Southeast False Creek
- Wetland area built to filter stormwater before it enters False Creek
- Intended streetcar stops through neighborhood
- Primarily residential w/retail and public parks and waterfront

RELATIONSHIP TO WILBURTON



- Downtown adjacent (across multimodal bridge)
- Public transit access
- Former Industrial Area
- Potential trail connection (Atlanta Beltline)
- Access to light rail
- Portion of larger False Creek neighborhood development plan
- Features creek and wetland areas



More Information:

- [Vancouver Olympic Village](#)

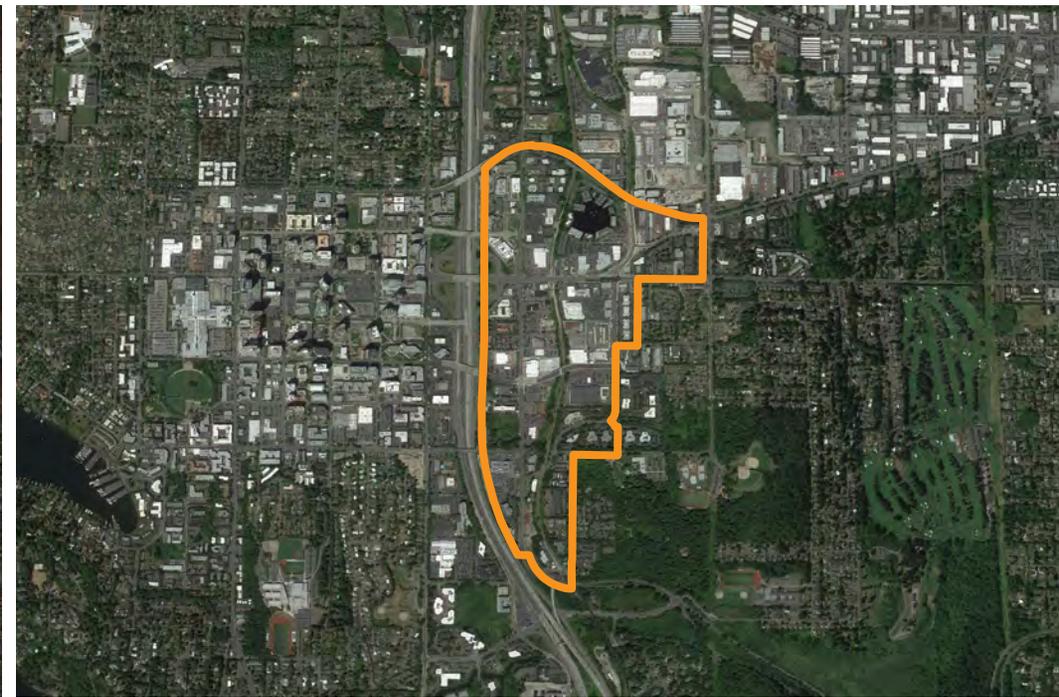
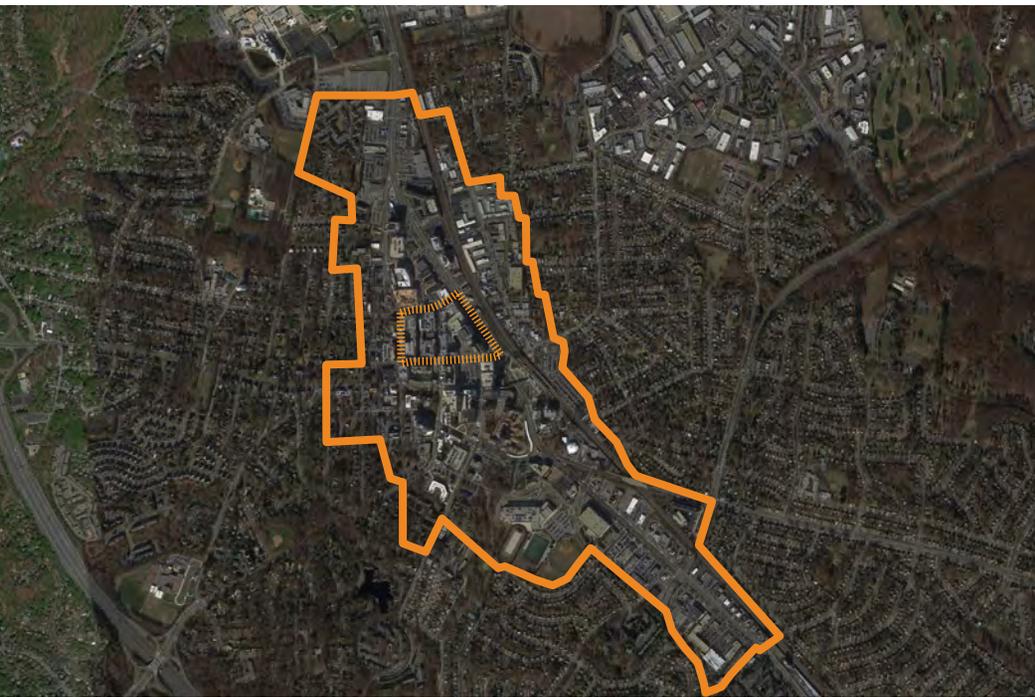


ROCKVILLE

TOWN CENTER



Overview



ROCKVILLE TOWN CENTER, ROCKVILLE, MD
~483 ACRES

WILBURTON STUDY AREA, BELLEVUE, WA
~300 ACRES

KEY FACTS



TOWN CENTER

- Area of highest projected employment growth for City of Rockville
- Mixed use area with a central core of development around Rockville Town Square
- Serviced by D.C. Metro's Red Line
- Moderately Priced Dwelling Unit Program requires ~15% of units to be affordable

TOWN SQUARE

- Core of Town Center
- Six-block urban mixed-use infill project
- Rockville Town Square is the first phase of development of the Rockville Master Plan
- Grew out of a community-based planning process that began soon after the city demolished the failed Rockville Mall in 1995
- Created a grid and pedestrian oriented streetscapes (trees, lights, benches)
- Mixed use, strong ground-floor retail presence
- Project required redirection of an existing creek



RELATIONSHIP TO WILBURTON



- Mid-density urban form
- Connected to Washington DC by Metro Rail
- Former mall/strip mall uses
- Public/private coordination led to best possible results
- Includes public buildings; library & performing arts center
- Similar demographic trends
- Centered around civic space
- Creek running through development area

More Information:

- [Rockville Town Center](#)
- [Rockville Town Square](#)

PRIORITIZATION OF ASSETS OPPORTUNITIES & FRAMEWORK

