

APPENDIX G

CURRENT AND FUTURE MARKET SUMMARY

This document provides an overview of land use changes that are expected in the study area through 2040. It includes population and employment forecast data, as well as other policy and planning context about zoning changes and upcoming developments.

MEMORANDUM

To: Darin Stavish
From: SSES Project Team
Date: October 7, 2022
Subject: Current and Future Markets

INTRODUCTION

This memo provides an overview of land use changes in the Stream System Expansion Study (SSES) study area. Growth across the region may support additional service along existing routes or the creation of new routes or service types to efficiently serve growing population and employment centers, in addition to the major service upgrades represented by new Stream bus rapid transit implementation.

POPULATION AND EMPLOYMENT PROJECTIONS

Densities of jobs and residents are critical elements in the design of transit networks. Routes through dense neighborhoods and job centers generally yield higher ridership than routes through lower-density areas.

This section summarizes what inputs were used to understand future population and employment densities. These growth levels were then used to calculate future ridership and other metrics used to evaluate the SSES corridors.

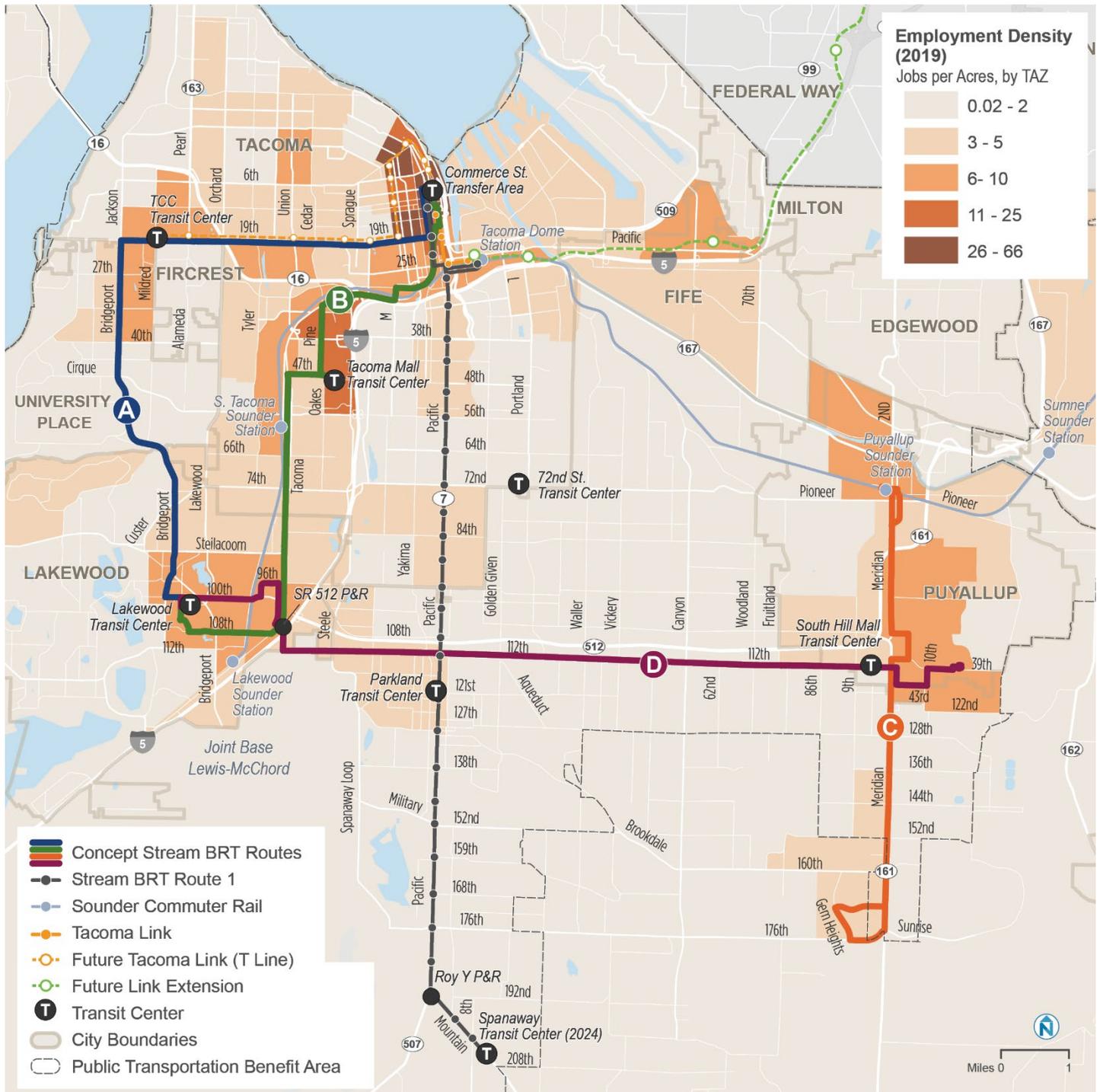
2040 Population and Employment Projections

Long-term population and employment model projections are developed for the Seattle region, including Pierce County, by Puget Sound Regional Council (PSRC). The PSRC model is a representation of future development based on the zoning and development allowances established in the comprehensive plans of individual jurisdictions in the region. This growth is assigned to individual transportation analysis zones (TAZs).

The current projections used for the SSES project are for a 2019 base (current) year and a 2040 horizon (future) year. Figure 1 and Figure 2 show the existing and future household density per acre by TAZ. Figure 3 and Figure 4 show the existing and future job density per acre by TAZ. Much of the growth in both households and employment is centered around SSES corridors A and B, with Corridor C projected to add the most jobs and households along the northern half of the corridor in Puyallup and Edgewood. Corridor D, which comprises many rural and unincorporated areas, generally shows the lowest projected growth.

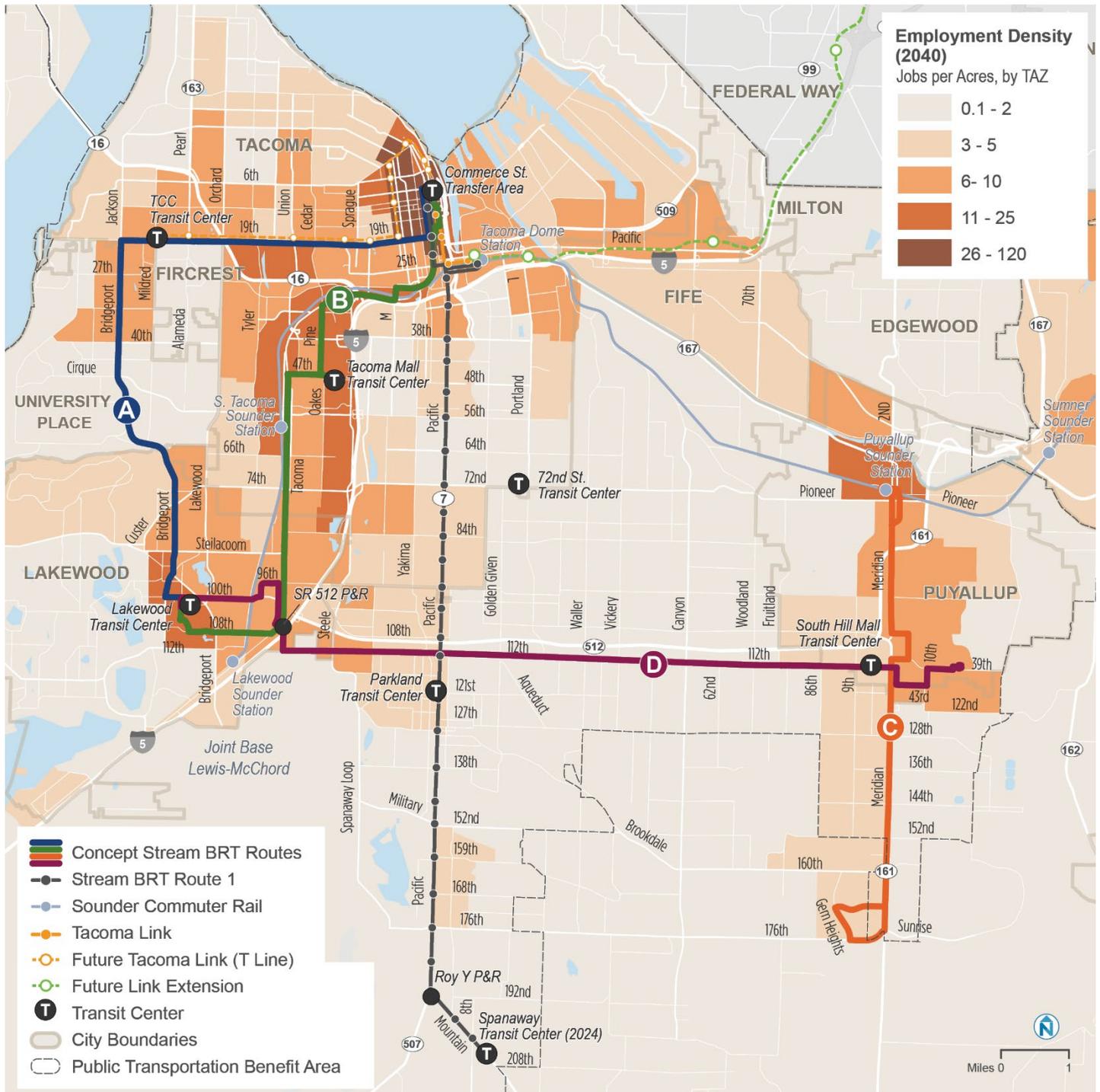
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Figure 3 Employment Density (2019)



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Figure 4 Employment Density (2040)



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Overall, Pierce County is expected to have a 53% increase in households and a 54% increase in jobs between 2019 and 2040. However, the growth is not evenly distributed, and each of the SSES corridors is expected to see different amounts of growth. Figure 5 shows the expected change in households and jobs in each corridor. Corridors A and B are projected to experience the most growth, at rates above the countywide rate. Corridor B is projected to grow the most, with a 129% increase in households and a 70% increase in jobs. Growth along Corridor C is expected to be approximately in line with the countywide rates. Corridor D, however, is expected to grow more slowly than the county.

Figure 5 Percent Change in Households and Employment (2019 to 2040)

Corridor	Description	Households	Employment
A	Downtown Tacoma to Lakewood Towne Center via 19th Street and Bridgeport Way	106%	63%
B	Downtown Tacoma to Lakewood Towne Center via S Tacoma Way	129%	70%
C	Downtown Puyallup and Puyallup Sounder to 176th Street E/Sunrise	57%	51%
D	Lakewood Towne Center to South Hill Mall & Pierce College	42%	43%
<i>Pierce County (average)</i>		53%	54%

KEY LAND USE CHANGES

PSRC is responsible for regional modeling that integrates locally developed plans and forecasts growth based on those plans. The current model forecasts population and employment growth to 2040. Several major developments in the SSES study area are included in PSRC’s modeling, including:

1. Tacoma’s Downtown Brewery District Infill Development Project
2. Tacoma’s James Center/Aviva Crossing Redevelopment Project
3. Four Corners Redevelopment Planning Area
4. Fircrest and University Place Form-Based Code Adoption
5. *Lakewood Landing* Transit Oriented Development

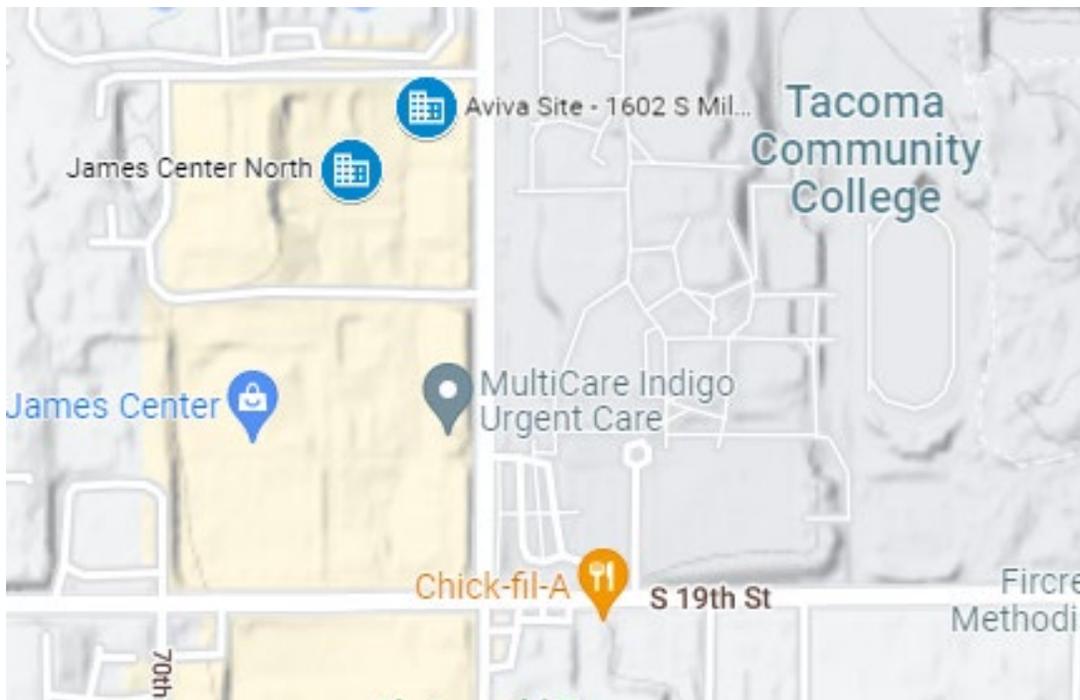
Tacoma’s Downtown Brewery District Infill

Tacoma’s Brewery Blocks are situated immediately south of the University of Washington-Tacoma campus in the heart of Downtown Tacoma (Figure 6). The Brewery Blocks are just a few blocks east of future Stream 1 stations planned along Market Street and Jefferson Avenue, and one block from numerous Pierce Transit bus routes and Sound Transit Link light rail on Pacific Avenue. When completed, the renovation and infill development at the Brewery Blocks will add more than 200 housing units, 25,000 square feet of retail space, and 75,000 square feet of Class A office space. Initial phases of construction are complete, with 70 residential units leasing and numerous commercial tenants in place.

James Center/Aviva Crossing Redevelopment

Tacoma Housing Authority plans to construct a mixed-income, mixed use, transit-supported development on nearly seven acres of land on the west side of S Mildred Street, between S 12th and S 19th streets in Tacoma's west end (Figure 7). The site is located immediately west of Tacoma Community College and one block north of SSES Corridor A, which traverses S 19th Street. The site will eventually be served by the Tacoma Link extension from Hilltop in 2039. The project intends to develop a model for compact, pedestrian-oriented development in an area of Tacoma with few similar sites. The project will incorporate transit-oriented development standards, mixed-use strategies, and mixed-income housing opportunities through public-private partnerships. Current plans call for up to 650 residential units and 30,000 square feet of commercial space.

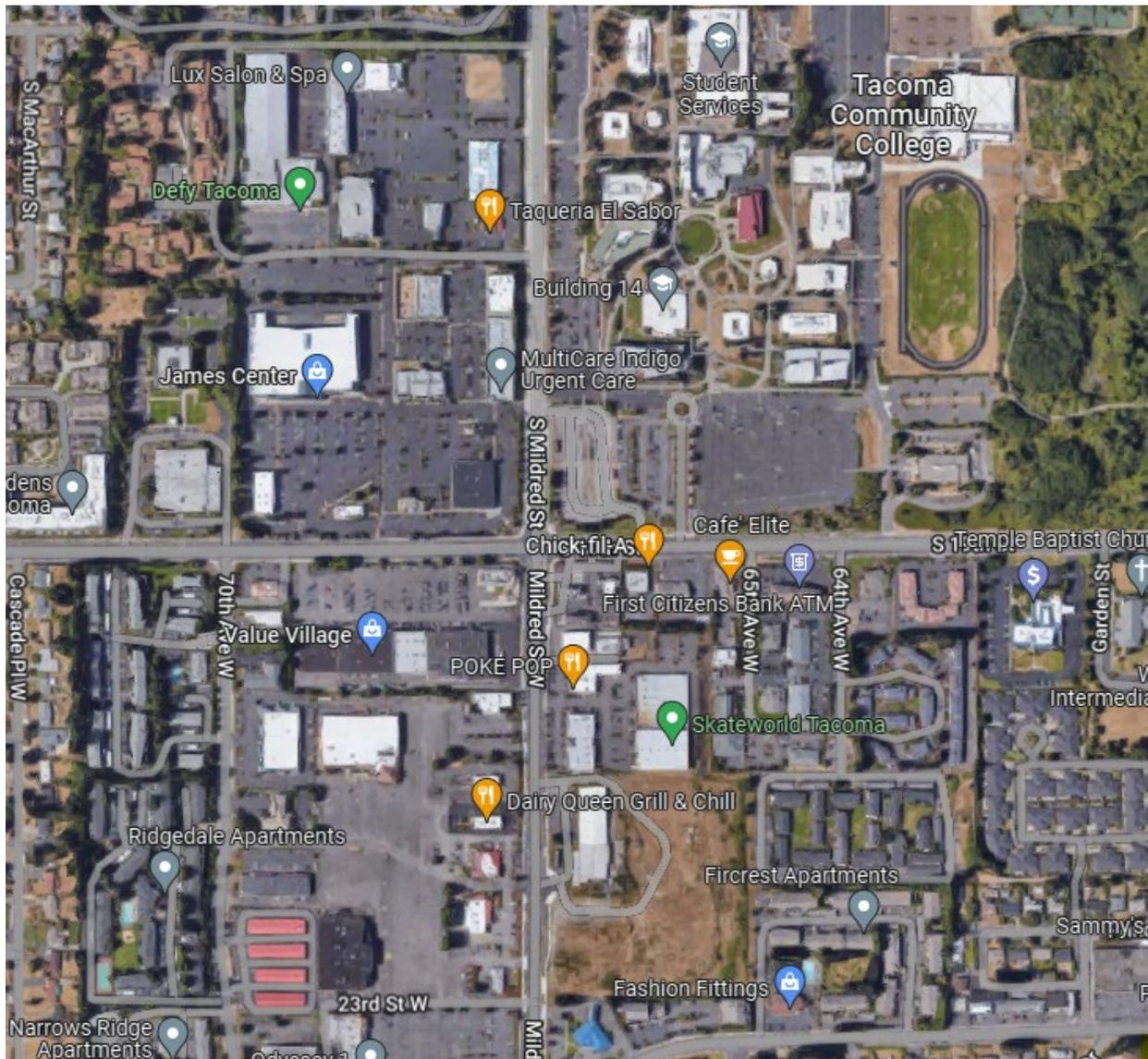
Figure 7 Location of James Center/Aviva Crossing Redevelopment



Four Corners Redevelopment Planning Area

The Four Corners area where Tacoma, Fircrest, and University Place intersect presents an opportunity for redevelopment coordinated across these three jurisdictions. The Four Corners area is centered around the intersection of S 19th Street (SSES Corridor A) and Mildred Street (Figure 9) and includes Tacoma Community College. No formal coordinated planning agreements or large-scale development agreements have yet been established. Combined with the nearby form-based code updates and James Center/Aviva project described above, coordinated redevelopment planning in this area could support future transit service enhancements and the coming Link light rail extension, which will have its western terminus within the Four Corners area.

Figure 8 Four Corners Redevelopment Planning Area



Fircrest and University Place Form Based Codes

The cities of Fircrest and University Place have recently adopted form-based codes in areas along substantial portions of SSES Corridor A. Form-based codes foster a high-quality public realm and a regular, predictable built environment through the use of physical form, scale, and character, rather than separation of uses, as the organizing principles for the code. Form-based codes also generally define the scale and types of streets and blocks, typically resulting in fine street grids with more blocks and intersections. These factors support transit use by ensuring a diverse mix of uses, excellent walkability and pedestrian connectivity, and higher density.

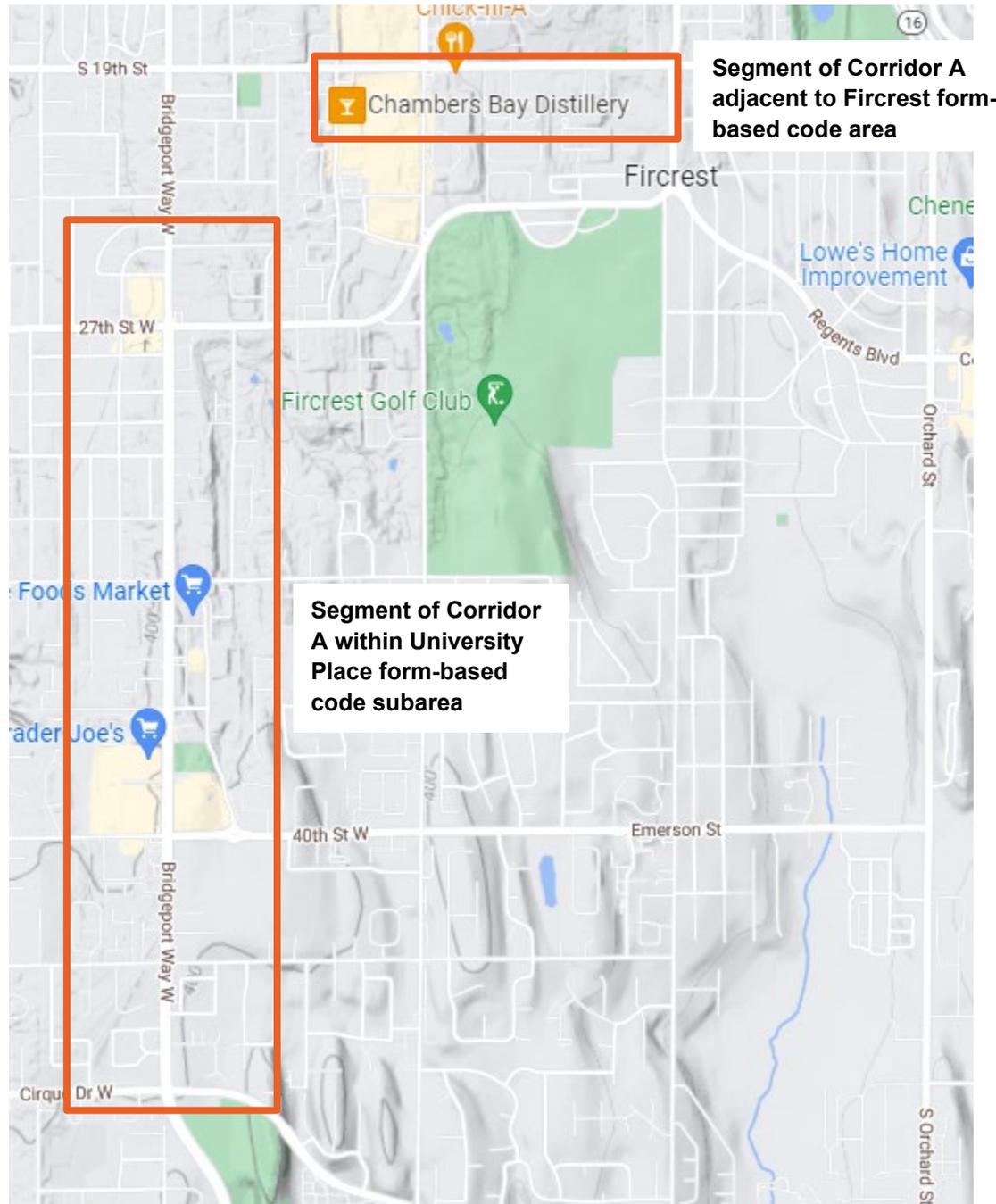
Fircrest borders Corridor A along the south side of S 19th Street between Orchard Street and Mildred Street W. The University Place form-based code applies to areas within the Regional Growth Center Subarea Plan, which encompasses a long stretch of Corridor A along Bridgeport Way between 27th Street W and Cirque Drive W. These two areas are highlighted in Figure 9.

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Over time as redevelopment and infill development occur along these areas of Fircrest and University Place, these segments of Corridor A will shift from some existing automobile-oriented land use patterns to diverse land uses at a pedestrian scale. This will support high capacity transit service or other upgraded transit service along S 19th Street and Bridgeport Way in the future.

Figure 9 Fircrest and University Place Form-Based Code Areas Adjacent to SSES Corridor A



Lakewood Landing Transit Oriented Development

Lakewood Landing is a 30-acre development opportunity located within the Lakewood Station District Subarea Plan area. The site is located along Pacific Highway SW a short distance northeast of the Lakewood Sounder station (Figure 8) and adjacent to one alignment option considered for both SSES Corridor A and Corridor D. The City of Lakewood is actively soliciting proposals from developers for the site, envisioning a vibrant mixed-use development to serve as a commercial anchor within the Lakewood Station District. The initial phase may develop one-third of the site acreage to add up to 760 housing units and 87,000 square feet of retail space.

Figure 10 Location of Lakewood Landing



Source: City of Lakewood

ADDITIONAL LAND USE CHANGES

Between updates to PSRC projections (the next update will be to a 2050 horizon year), jurisdictions continue adapting land use actions and policies to changing conditions. Zoning changes or major developments approved between projection periods are not captured in the PSRC model until the next update is complete. Between the 2040 and 2050 projections in the SSES study area, several major land use changes were identified through discussions with Pierce County jurisdictions. The following were *not* included in the PSRC 2040 growth projections described above and used in the SSES corridor evaluation, but are described here to highlight areas that will likely one day present strong opportunities for new or upgraded transit service:

1. Home in Tacoma Zoning Changes
2. City of Edgewood Developments and Plans

3. Pierce County Zoning Changes

The PSRC forecasts already include a large amount of growth in both households and employment within Pierce County. Although other local planning efforts (such as Home in Tacoma and up-zoning in Pierce County dependent on BRT service) and other local density-enabling legislation may increase housing, analysis by the SSES project team determined that PSRC growth assumptions already account for more growth than can be realized by those efforts and legislation.

Home in Tacoma

Home in Tacoma¹ refers to a package of changes to Tacoma's zoning, city code, and policies to increase housing supply, improve housing affordability, and provide more housing choices for current and future residents.

Home in Tacoma analysis projected 20,000 to 45,000 additional housing units in Tacoma over the twenty years from 2020 to 2040.² The low end of the range was approximately double the rate of growth since 2000, whereas the high end of the range was based on the PSRC Land Use Vision.

Specific estimates for the impact of Home in Tacoma have yet to be developed because the actual changes to zoning and the city code are not yet complete. However, there is an expectation that Home in Tacoma (once implemented) will increase the number of households on the higher end of the spectrum (approximately 40,000 new housing units over the next two decades).

¹ <https://www.cityoftacoma.org/cms/one.aspx?pagelId=180033>

²

https://www.cityoftacoma.org/UserFiles/Servers/Server_6/File/cms/Planning/Affordable%20Housing/AHAS%20Planning%20Actions/Tacoma%20Housing%20Action%20Plan%206-8-21.pdf

City of Edgewood Developments

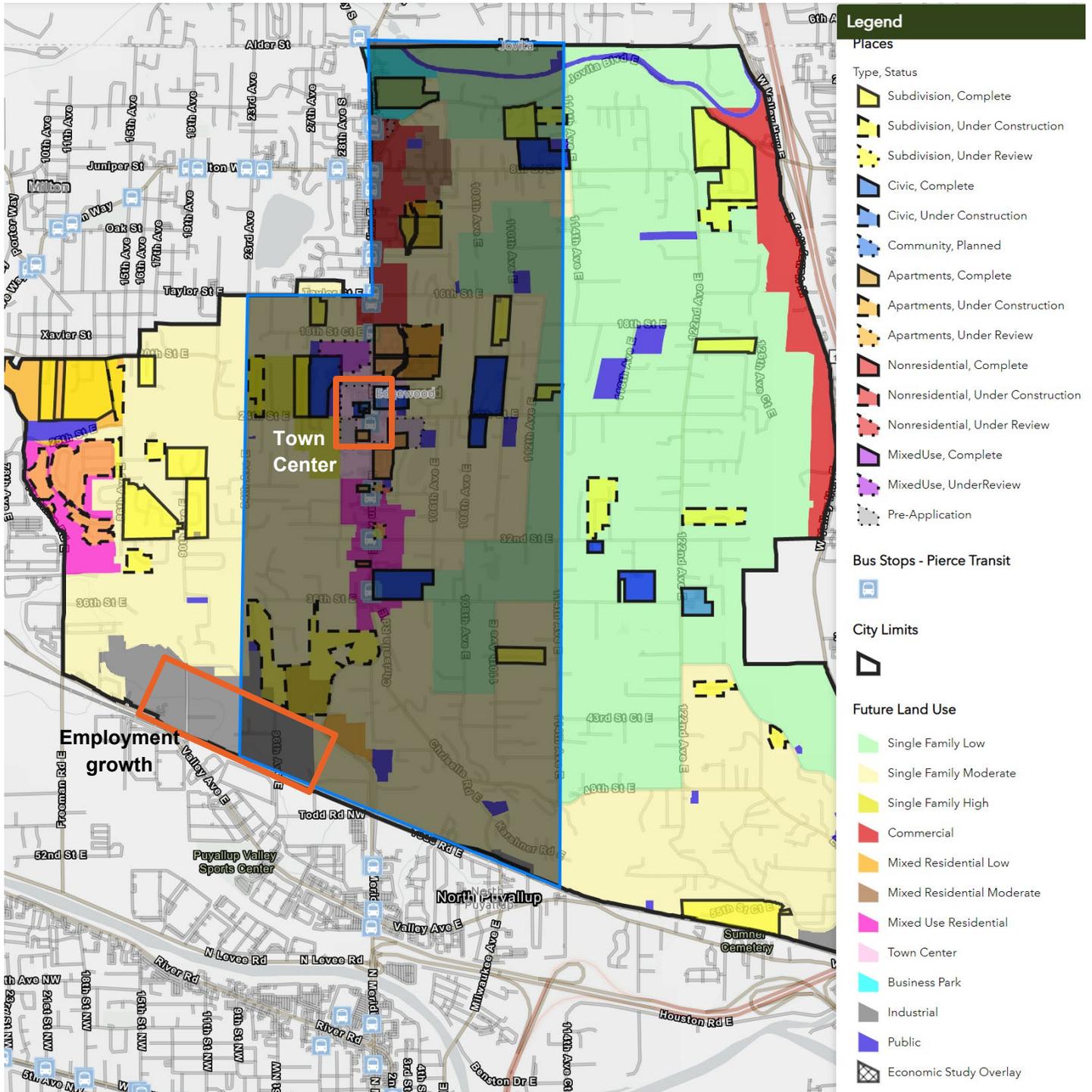
The City of Edgewood is planning to focus growth along Meridian Avenue (SSES study Corridor C), which will support growth in transit ridership in the future. Overall Edgewood is anticipating roughly 5,000 additional residents by the year 2050 according to current land use plans and growth projections. Key points related to current plans/policies and planned developments include:

- Job densities are reflected in the Pierce County Buildable Lands Report; however, it does not fully reflect the Mixed-Use Residential (MUR) zoning that generally follows Meridian. Maximum densities (excluding bonuses) per the City's Comprehensive Plan are 48 units per acre in Commercial and Town Center zones and 24 units per acre in MUR zones.
- A Town Center subarea plan currently underway will define future growth and development potential centered on Meridian Ave and 24th Street, near City Hall.
- New mixed-use development permitted or proposed will add more than 1,100 housing units within the Town Center in the next three years.
- Significant employment growth (more than 1,000 jobs expected) is anticipated in southwest Edgewood along 90th Ave E, however this is approximately one mile from potential BRT stations along Meridian Ave, with no existing transit connection.

A map of Edgewood places and zoning, including the Town Center plan area and development areas including future industrial land are highlighted in Figure 6 along with a generally 1/2-mile zone along the Meridian corridor.

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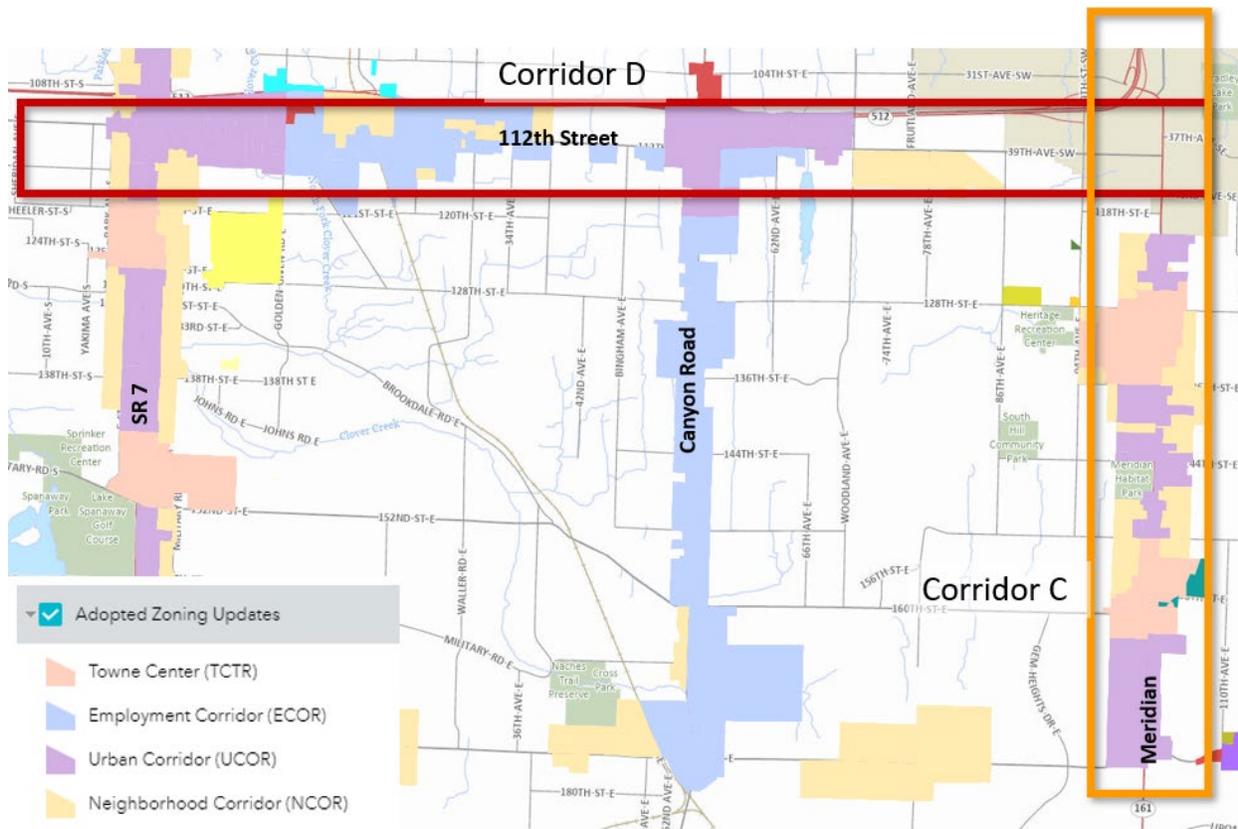
Figure 11 Edgewood Town Center and Anticipated Employment Growth Area



Pierce County Zoning Changes

In Fall 2021 the Pierce County Council adopted a slate of zoning changes applicable to unincorporated areas of the county. These will allow additional housing and employment density within and along identified Centers and Corridors, which follow primary roadway corridors such as SR 7 (Pacific Avenue), 112th Avenue, Meridian, and Canyon Road (Figure 7). The Urban Corridor and Town Center designations (light purple and light pink on the map, respectively) allow the highest residential densities, with up to 60 units per acre in Urban Corridors and up to 25 units per acre in Town Centers. Urban Corridor areas are found along both Corridor C and D, while Town Centers are clustered only on Corridor C (the South Hill Mall Town Center). The Town Center land use designation has additional allowable density built in that would be unlocked if BRT service were funded or in service along the corridors – up to 80 units per acre. Based on direction from County staff, the project team considered assuming these BRT-supported densities would be in place for the purpose of the study comparative evaluation.

Figure 12 Pierce County Adopted Zoning with SSES Corridors C and D



CONCLUSION

Home In Tacoma, major redevelopment projects, local jurisdiction code updates, new land use policies and development in the City of Edgewood, and Pierce County Community Plan zoning changes reflect policy choices and legislation that will help achieve higher densities, and were all considered as potential additions to the PSRC projections.

However, the PSRC forecast already includes a large amount of growth in both households and employment. This has been integrated into Sound Transit's ridership model, which was used to project ridership on each SSES corridor.

The PSRC projections for 2040 already account for more than the growth that could be realized through each of the individual land use elements considered. Therefore, no additional land use assumptions were incorporated into the SSES corridor evaluation beyond PSRC projections.