



11. MARKET ANALYSIS

In addition to providing a means to identify and prioritize non-motorized network improvement projects, the connectivity index developed earlier can be combined with other transit and land use metrics to perform large-scale planning analyses. This chapter summarizes an area-wide analysis of transit usage, land use, and non-motorized connectivity to categorize the study area into three groups:

- **Marketing Potential:** Areas with good connectivity and good transit service, but lower public transit mode share
- **Investment Potential:** Areas that exhibit moderate to high density and good transit service, but with poor connectivity and low public transit mode share
- **Zoning Potential:** Areas with good connectivity and transit service, but low population density and public transit mode share

The following methodology was developed to identify the areas that fit the profiles described above:

1. Public transit mode share from the 2011 five-year ACS commute trip profiles at a block group level was assigned to each stop-area utilizing a half-mile buffer
2. The average population density for each station was determined based on a half-mile area using ACS population data at the block-group level
3. The existing non-motorized connectivity index for each transit stop/station in the study area was determined via the process defined in the existing conditions section of this report
4. Stop/station-areas were scored for each variable based on a combination of the factors listed above

To understand how station-areas rate within the region, the factors were scored based on quartile bins of the underlying data. For example, the top 25% station-areas exhibited a connectivity index above 3.75 while the bottom 25% scored below 3.15. Because population density was primarily a factor for the Zoning Potential, the scores were only given half the weight for the Marketing and Investment Potential ratings. Stations with



public transit mode share above 25% were precluded from the results to prevent bias because of Downtown Seattle stations. The stations in Downtown Seattle mostly exhibit high levels of transit mode share, connectivity and population density and their inclusion would have diminished any measurable differences between other areas.

Existing Connectivity Index

Index Score			
Connectivity Index	Marketing*	Investment*	Zoning*
<3.15	1	5	1
3.15 – 3.49	2	3	2
3.50 – 3.74	3	2	3
>3.75	5	1	5

Public Transit Mode Share

Index Score			
Public Transit	Marketing	Investment	Zoning
<10%	5	5	5
10-14%	3	3	3
15-20%	2	2	2
>20%	1	1	1

Population Density

Index Score			
Population Density (people/acre)	Marketing	Investment	Zoning
<10	0.5	0.5	5
10-14	1	1	3
15-25	1.5	1.5	2
>25	2.5	2.5	1

* Notes:

Marketing: Good connectivity and transit service, lower transit mode share

Investment: Moderate/high density, good transit service, poor connectivity

Zoning: Good connectivity and transit service, but low densities



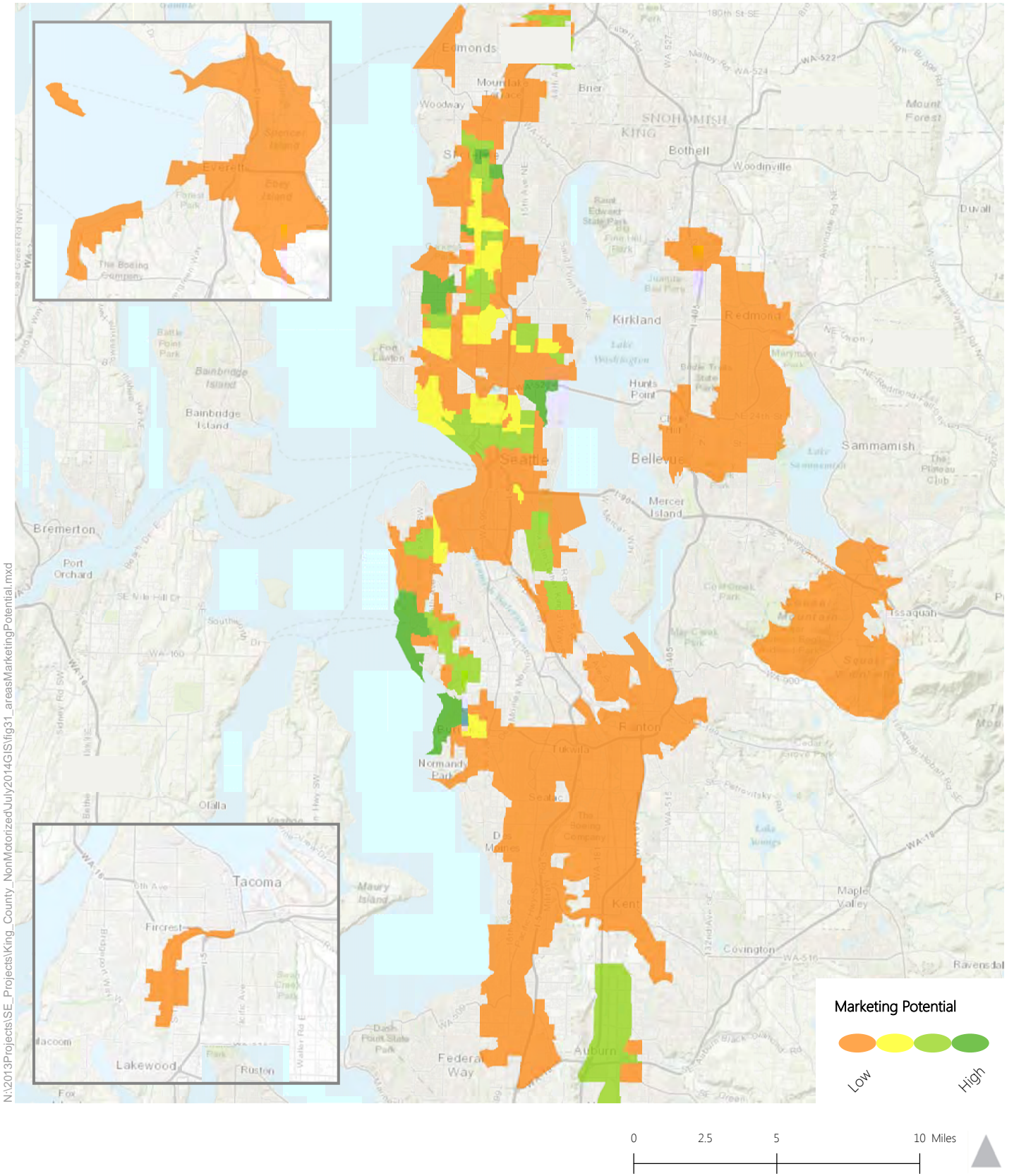
RESULTS

Marketing Potential

In general, areas within Seattle scored the best due to relatively high existing connectivity scores and generally high population density values as shown in **Table 25**. In particular, areas in West Seattle and along the Aurora Corridor scored well while more suburban areas did not score as highly due to either lower connectivity scores or lower population density. Note that most of the areas with higher connectivity scores and population densities tended to have relatively high public transit usage as well. Burien and Shoreline are examples with lower existing transit mode shares. Despite the relatively high public transit usage, there are still a large number of trips that could be made by transit, and thus these areas are ripe for additional marketing to point out that transit is accessible. **Figure 31** highlights the marketing potential present in the study area. Because the underlying data was based upon the Census Block Group, the maps utilize this unit of analysis for score visualization purposes.

Table 25: Station Areas with High Potential for Marketing Efforts

<i>Nearby Stop Name</i>	<i>Area</i>	<i>Percent Public Transit Use</i>	<i>Existing Connectivity</i>	<i>Population Density</i>	<i>Marketing Score</i>
DENNY WAY & DEXTER AVE N	Seattle	17%	3.91	36.5	9.5
1 ST AVE & DENNY WAY	Seattle	17%	3.86	30.6	9.5
15TH AVE NW & NW 85TH ST	Seattle	13%	3.57	21.5	7.5
AMBAUM BLVD SW & SW 144TH ST	Burien	7%	3.63	8.3	7.5
AURORA AVE N & N 165TH ST	Shoreline	12%	3.50	11.5	7
SW ALASKA ST & CALIFORNIA AVE SW	Seattle	15%	3.53	21.5	6.5
SW BARTON ST & 29TH AVE SW	Seattle	16%	3.60	16.6	6.5
AURORA AVE N & N 100TH ST	Seattle	18%	3.60	22.0	6.5
MERIDIAN AVE N & N NORTHGATE WAY	Seattle	17%	3.60	15.7	6.5



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Figure 31

Station Areas with High Marketing Potential



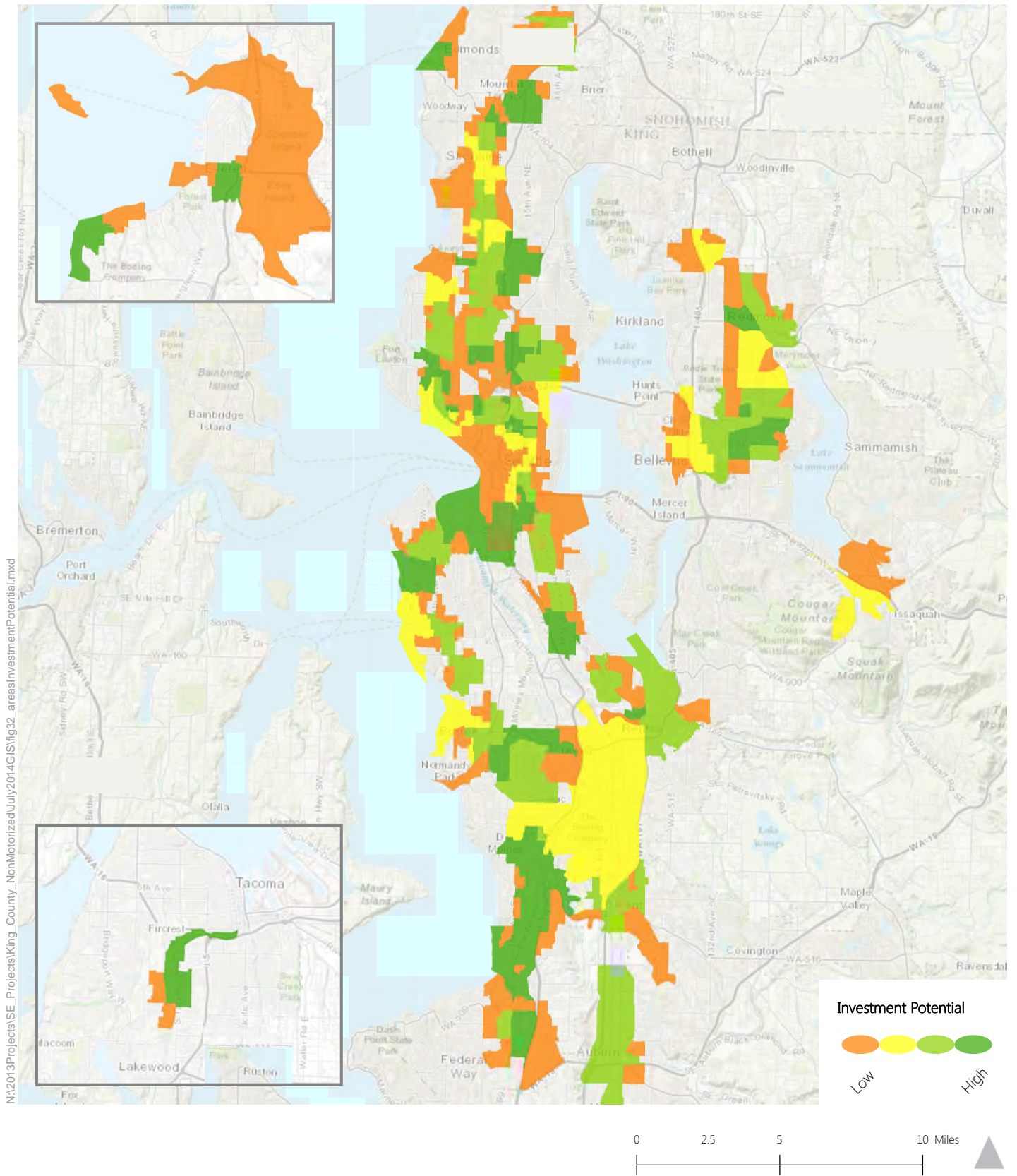


Investment Potential

The results for the investment potential analysis were more varied between suburban and urban areas as shown in **Table 26**. Higher scoring areas included Federal Way, Everett, Mountlake Terrace, Des Moines, Edmonds, and Seattle. These areas exhibited lower scores in connectivity yet exhibited relatively high population densities. Providing improved connectivity to these relatively dense areas could boost ridership on the existing transit lines. **Figure 32** highlights the area-wide distribution of investment potential.

Table 26: Station Areas with High Potential for Infrastructure Investment

<i>Nearby Stop Name</i>	<i>Area</i>	<i>Percent Public Transit Use</i>	<i>Existing Connectivity</i>	<i>Population Density</i>	<i>Investment Score</i>
PACIFIC HWY S & S 260TH ST	Des Moines	5%	2.93	15.4	11.5
EVERETT STATION	Everett	9%	2.97	24.4	11.5
PACIFIC HWY S & S 288TH ST	Federal Way	7%	3.11	14.0	11
MOUNTLAKE TERRACE TC	Mountlake Terrace	8%	3.02	10.0	11
PACIFIC HWY S & S 240TH ST	Des Moines	6%	2.89	8.9	10.5
148TH AVE NE & NE 87TH ST	Redmond	8%	3.05	8.5	10.5
EDMONDS STATION	Edmonds	9%	2.88	8.5	10.5
AURORA AVE N & N 135TH ST	Seattle	10%	3.50	17.9	9.5



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Figure 32

Station Areas with High Investment Potential



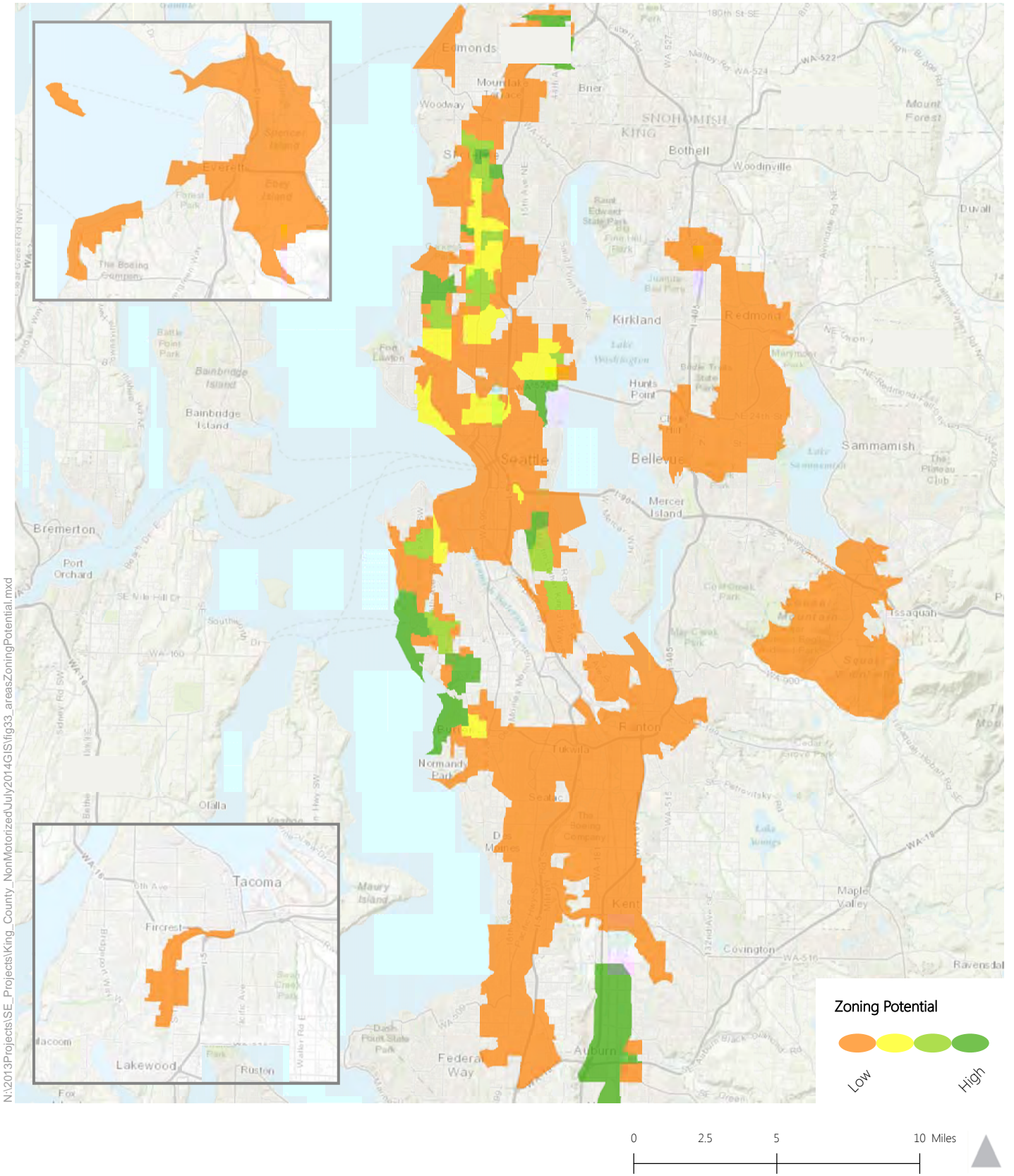


Zoning Change Potential

As shown in **Table 27**, the areas that exhibited the highest potential return from zoning changes also varied between suburban and urban areas. Burien, portions of West Seattle, Lynnwood, and Auburn all scored highly because of generally good connectivity and lower population density. Increased zoning or improved conditions to encourage redevelopment could increase population density and the pool of potential transit riders. **Figure 33** highlights those areas that scored the highest for potential zoning change.

Table 27: Station Areas with High Potential Return from Zoning Changes

<i>Nearby Stop Name</i>	<i>Area</i>	<i>Percent Public Transit Use</i>	<i>Existing Connectivity</i>	<i>Population Density</i>	<i>Zoning Score</i>
AMBAUM BLVD SW & SW 144TH ST	Burien	7%	3.63	8.3	13
FAUNTLEROY WAY SW & SW BARTON ST	Seattle	13%	3.50	7.8	11
LYNNWOOD TC	Lynnwood	16%	3.52	5.5	10
AUBURN TC	Auburn	15%	3.64	4.4	10
NE PACIFIC ST & NE PACIFIC PL	Seattle	16%	3.87	10.5	10
AURORA AVE N & N 165TH ST	Seattle	12%	3.50	11.5	9
AURORA AVE N & 185TH ST	Seattle	24%	3.50	13.6	8
15TH AVE NW & NW 85TH ST	Seattle	13%	3.57	21.5	8



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Figure 33

Station Areas with High Zoning Potential

