

# Growing Transit Communities Monitoring Report

Presented to the Regional TOD Advisory Committee • December 15, 2017



Puget Sound Regional Council



# Growing Transit Communities Strategy



The [Growing Transit Communities Strategy](#), adopted in 2014, calls for regional and local actions that respond to the challenges and opportunities in transit communities. The Strategy is centered around three main goals:

- Attract more of the region's residential and employment growth near high-capacity transit
- Provide housing choices affordable to a full range of incomes near high-capacity transit
- Increase access to opportunity for existing and future community members in transit communities.



To help inform the Strategy, [Existing Conditions Reports](#) were developed in 2011 for high capacity transit study areas across the region. In 2017, PSRC staff, at the direction of the [Regional Transit-Oriented Development Advisory Committee](#), updated information from the 2011 Existing Conditions Reports to set a new baseline for newly planned and funded stations areas along with the existing station areas that were studied previously. This monitoring report is intended to describe recent trends and current conditions in station areas as well as highlight strengths and gaps in implementing the Growing Transit Communities Strategy and can provide a roadmap for future work to support ongoing regional and local efforts.





# The regional transit network is expanding

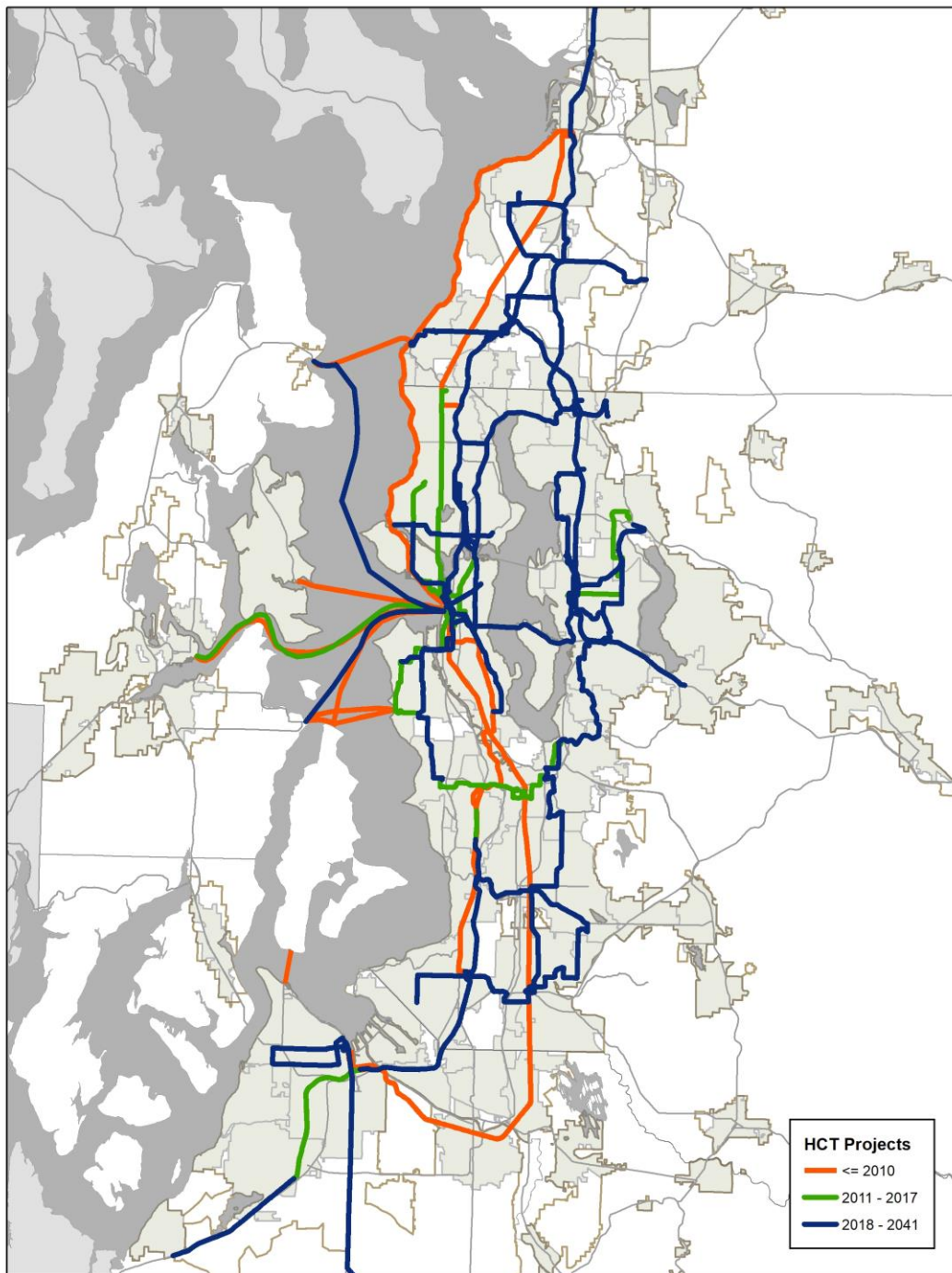
## 2010 Network

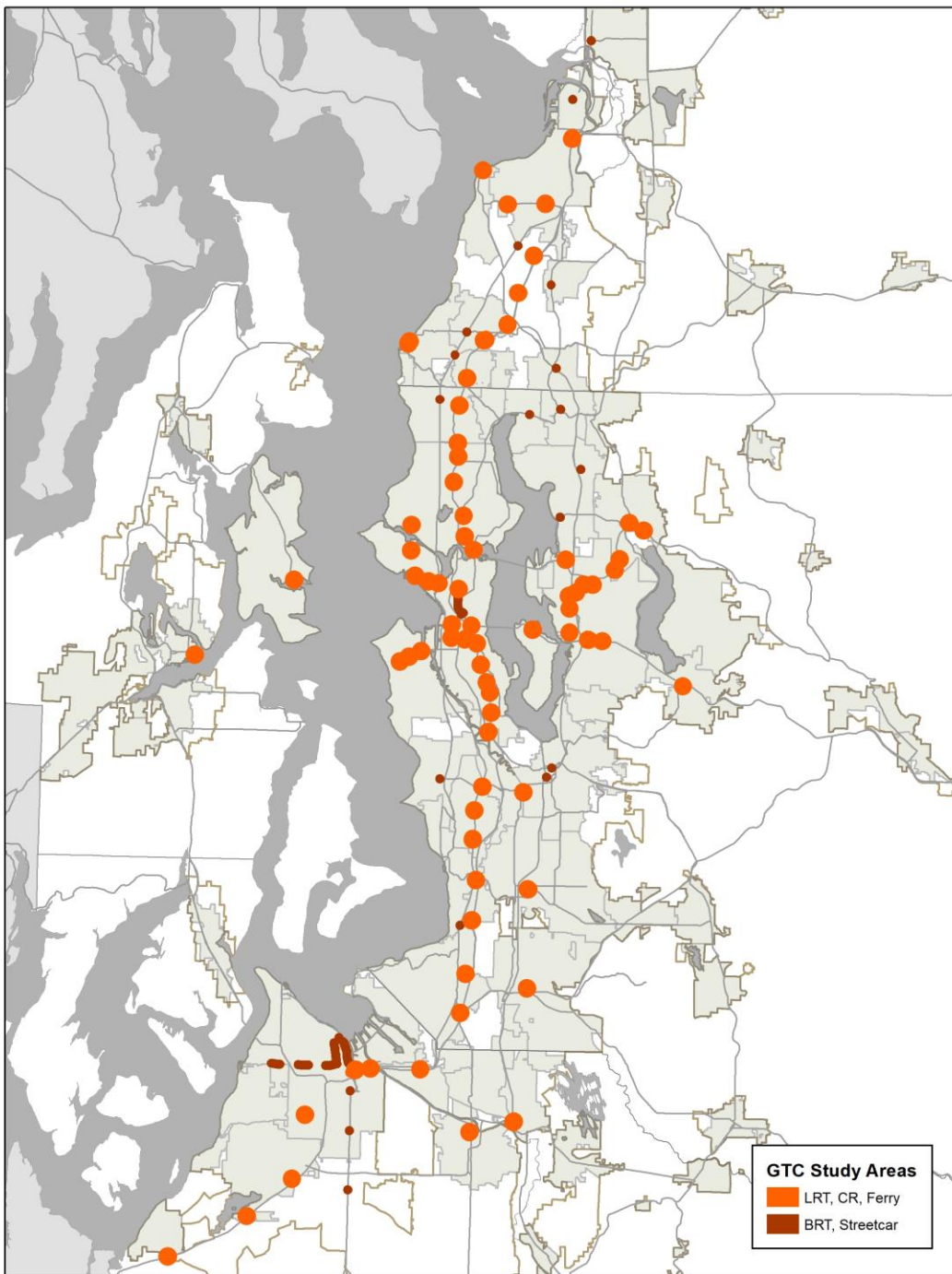
## Additions made 2010-2017

- LINK and Sounder
- RapidRide
- Fast Ferry to Bremerton
- First Hill Streetcar

## Investments by 2041

- LINK and Sounder
- SWIFT
- Fast Ferry RapidRide
- HCT along SR7





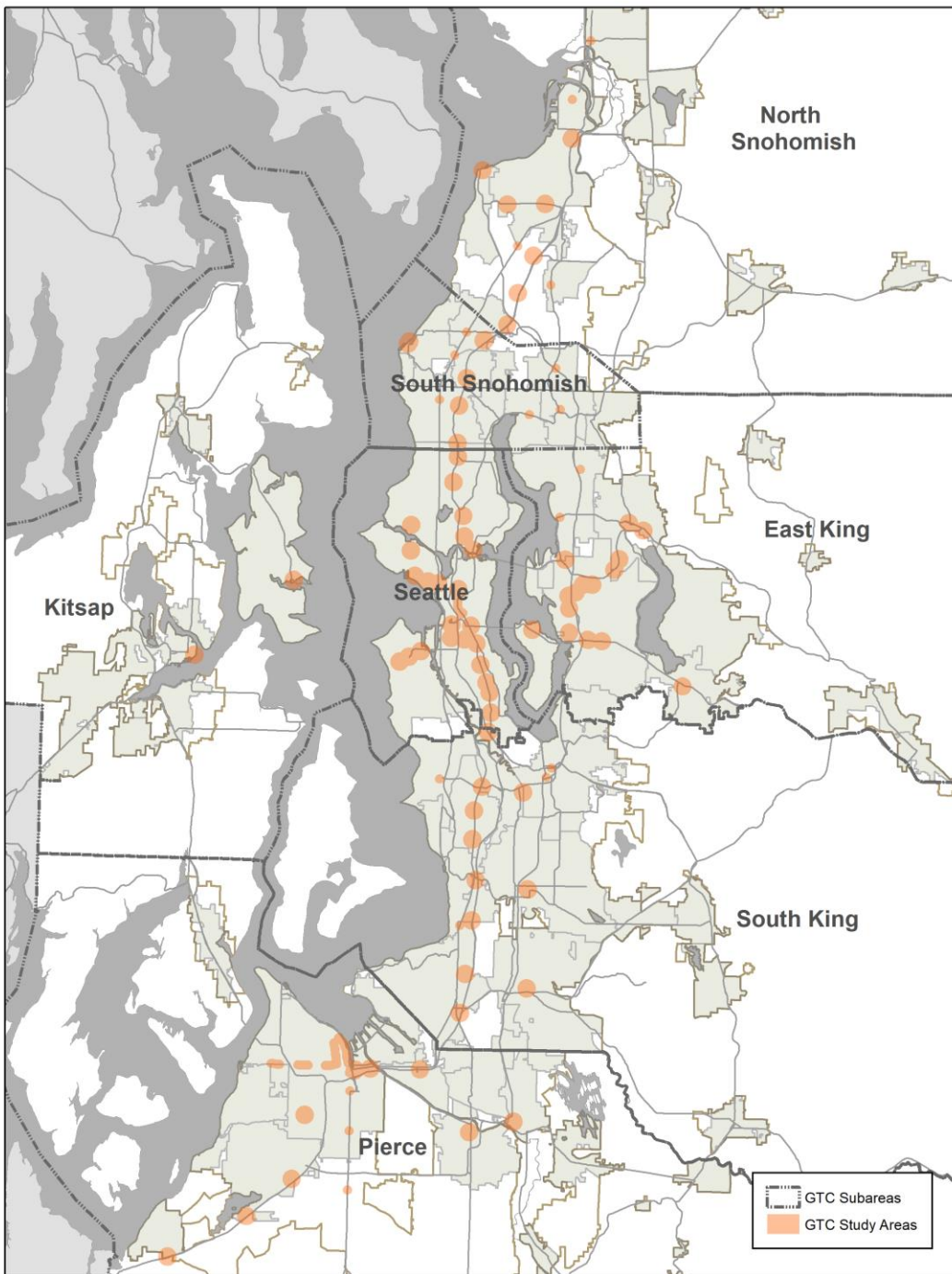
# Updated Station Areas

- Sound Move, ST2, ST3
- Sounder
- Ferry
- Streetcar
- Bus Rapid Transit (BRT)

96 study areas

- ½ mile buffer for light rail, commuter rail, and ferries
- ¼ mile buffer for streetcar and BRT
- Downtown Seattle stations not included because of unique characteristics





# Corridors → Areas



The GTC Strategy focused on four corridors: East, North, South, and Central. The new study areas cover a greater geography and comprise multiple corridors and transit nodes. The updated set of stations are now grouped into seven areas based on the timing of transit investments .

**Seattle:** Rainier Beach to NE 130<sup>th</sup>

**South Snohomish:** NE 145th to Lynnwood TC

**North Snohomish:** West Alderwood Mall to Marysville

**East King:** Mercer Island to Issaquah and Kirkland

**South King:** Tukwila Int'l Blvd to South Federal Way

**Pierce:** Fife to DuPont

**Kitsap:** Winslow Way and Bremerton



# Part 1: Performance Monitoring

Are we achieving desired *outcomes* and *results*?

The following slides provide updated information on population, housing, and job growth in the transit community study areas.





# Who lives in station areas?

From 2010-2016, 21% of regional population growth occurred in station areas



# Population in Station Areas



**+63,274**

**+19%**

**329,341**

**8.9% of region's population**

2010

**392,615**

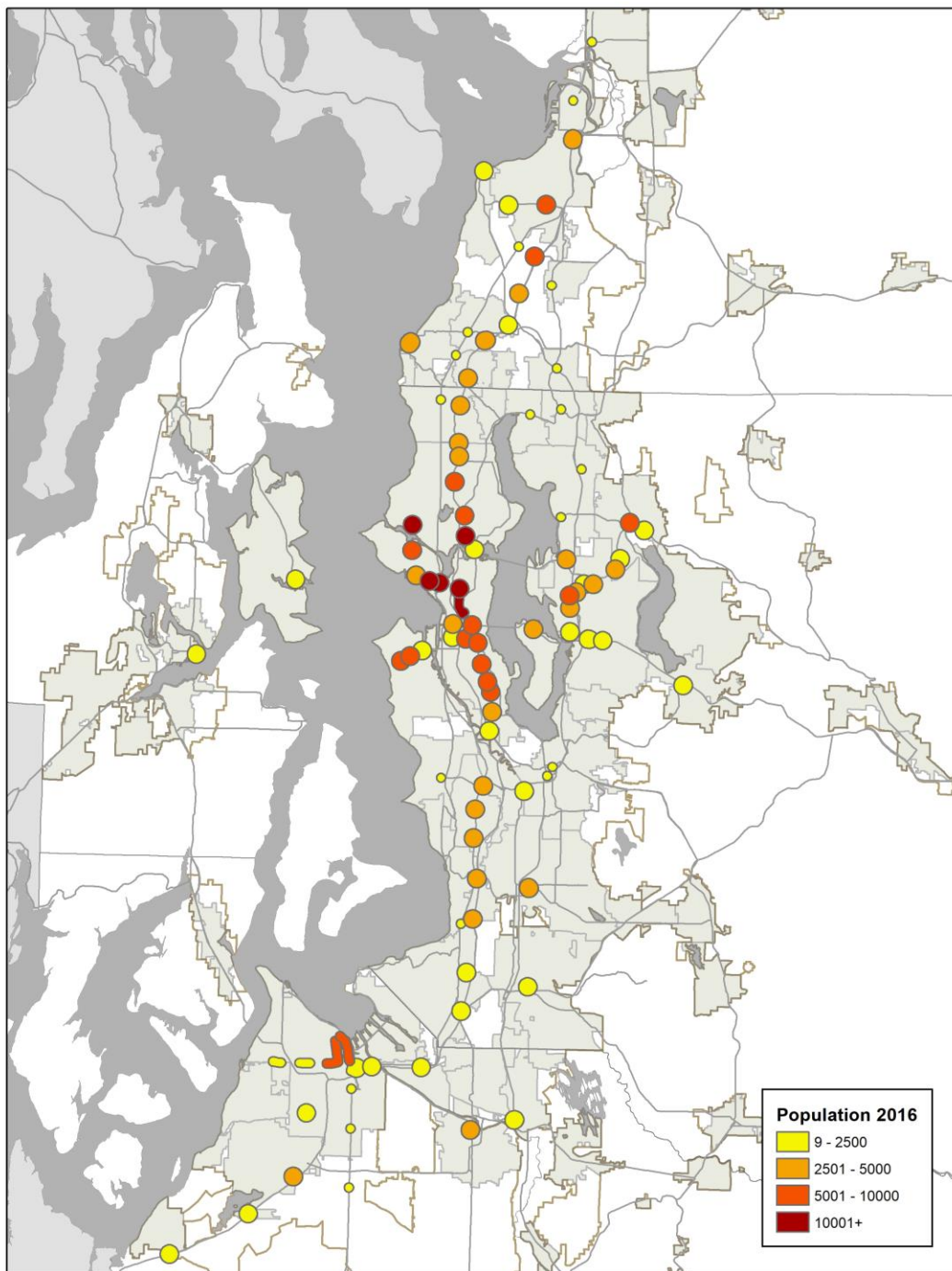
**9.8% of region's population**

2016



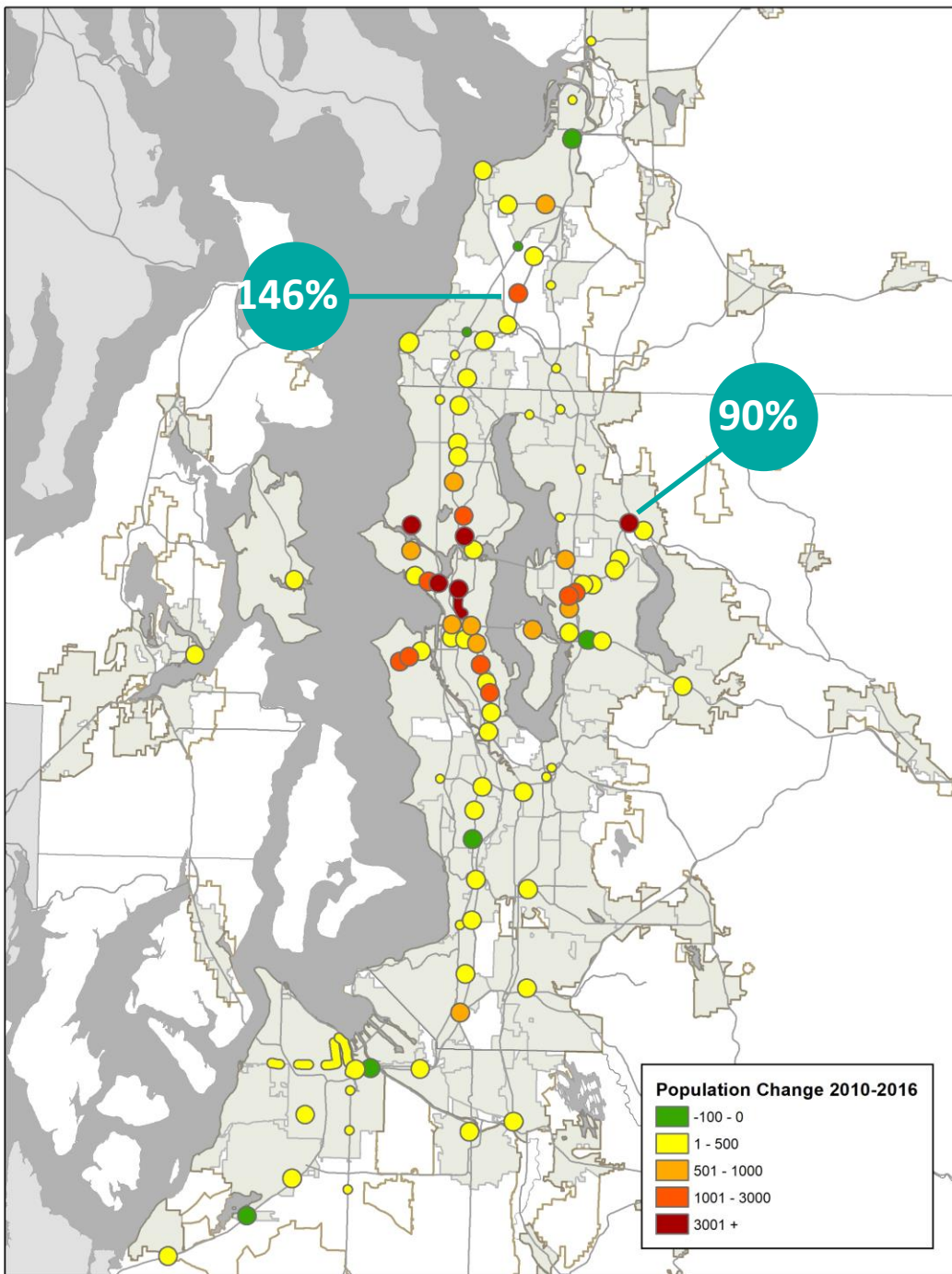


# Population in station areas varies across the region



- The map shows total population in station areas in 2016
- **1** in **10** residents lives in a station area
- **7** station areas exceed 20 people/acre, and **6** of these do not currently have light rail

Source: OFM estimates 2016



# Station area growth varies across the region



- The map shows the absolute change in population in station areas from 2010 to 2016
- Existing population centers are growing: **Downtown Bellevue, Redmond, South Lake Union**
- New population centers are emerging: **Ash Way, South Federal Way**
- Of the top 10 fastest growing station areas, only **2** have HCT online

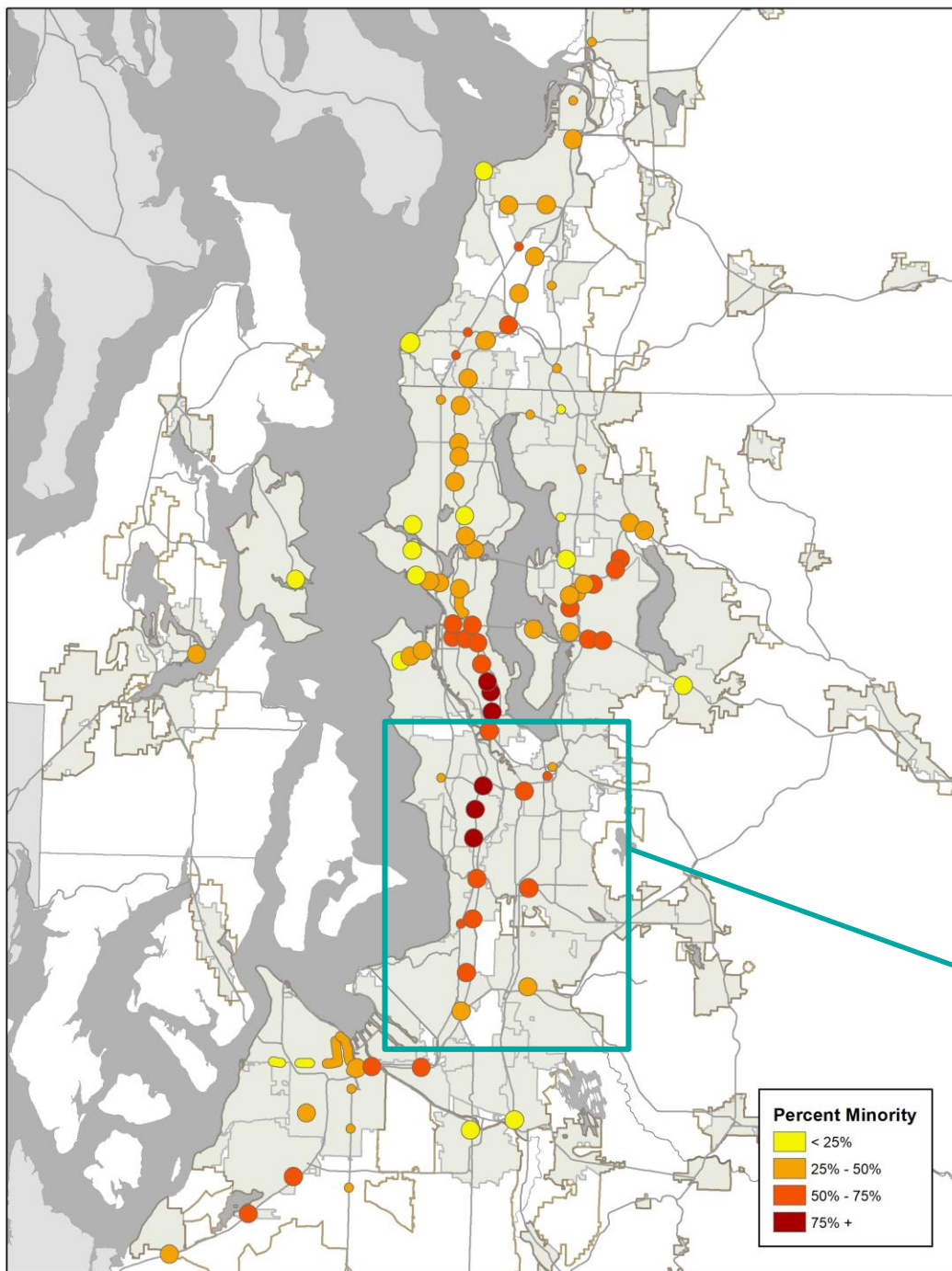




# Station areas are more diverse than the region as a whole

- The map shows the percentage of residents in station areas who identify as non-white minorities
- **45%** minority in station areas
- **34%** minority in region

South King station areas have largest share of minority population: **64%**



Source: 2015 American Community Survey 5-year estimates



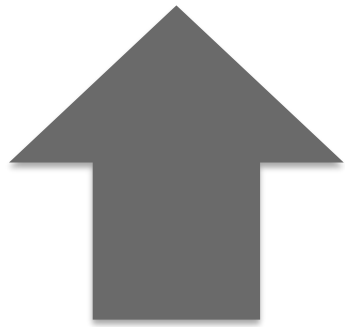
# Who can afford to live in station areas?

From 2010 – 2015, 1/3 of housing permits regionally were issued in station areas





# Housing Units in Station Areas



**+34,037**  
**+21%**

**161,878**

**10.3% of region's housing units**

**2010**

**195,915**

**11.9% of region's housing units**

**2015**

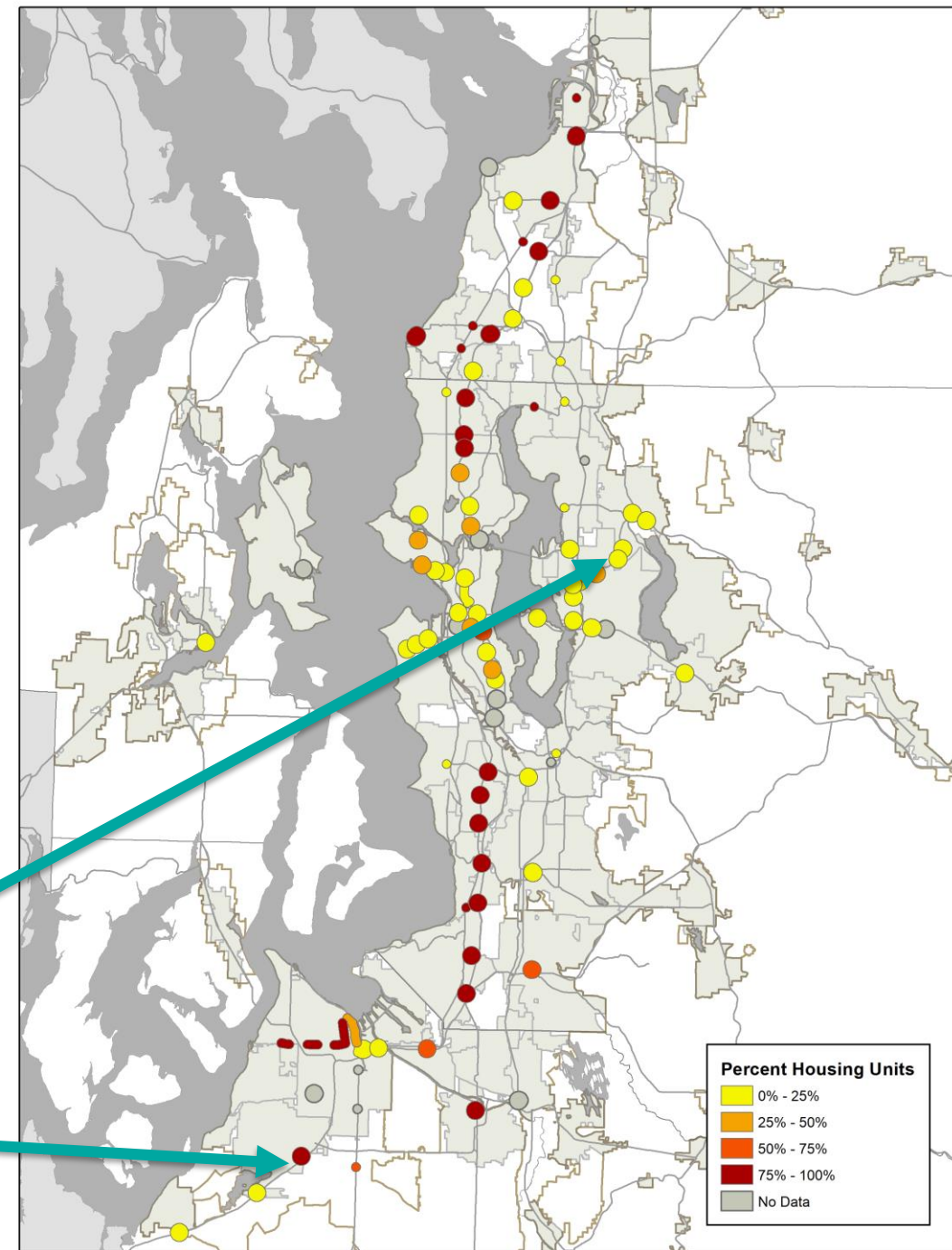
# Many transit communities have limited market-rate affordable housing (Affordable to 0-80% AMI)

- The map shows the percentage of housing units in station areas that are affordable to households making 80% AMI or less

**Highest average rent:** Spring District/120th

**Lowest average rent:** Lakewood

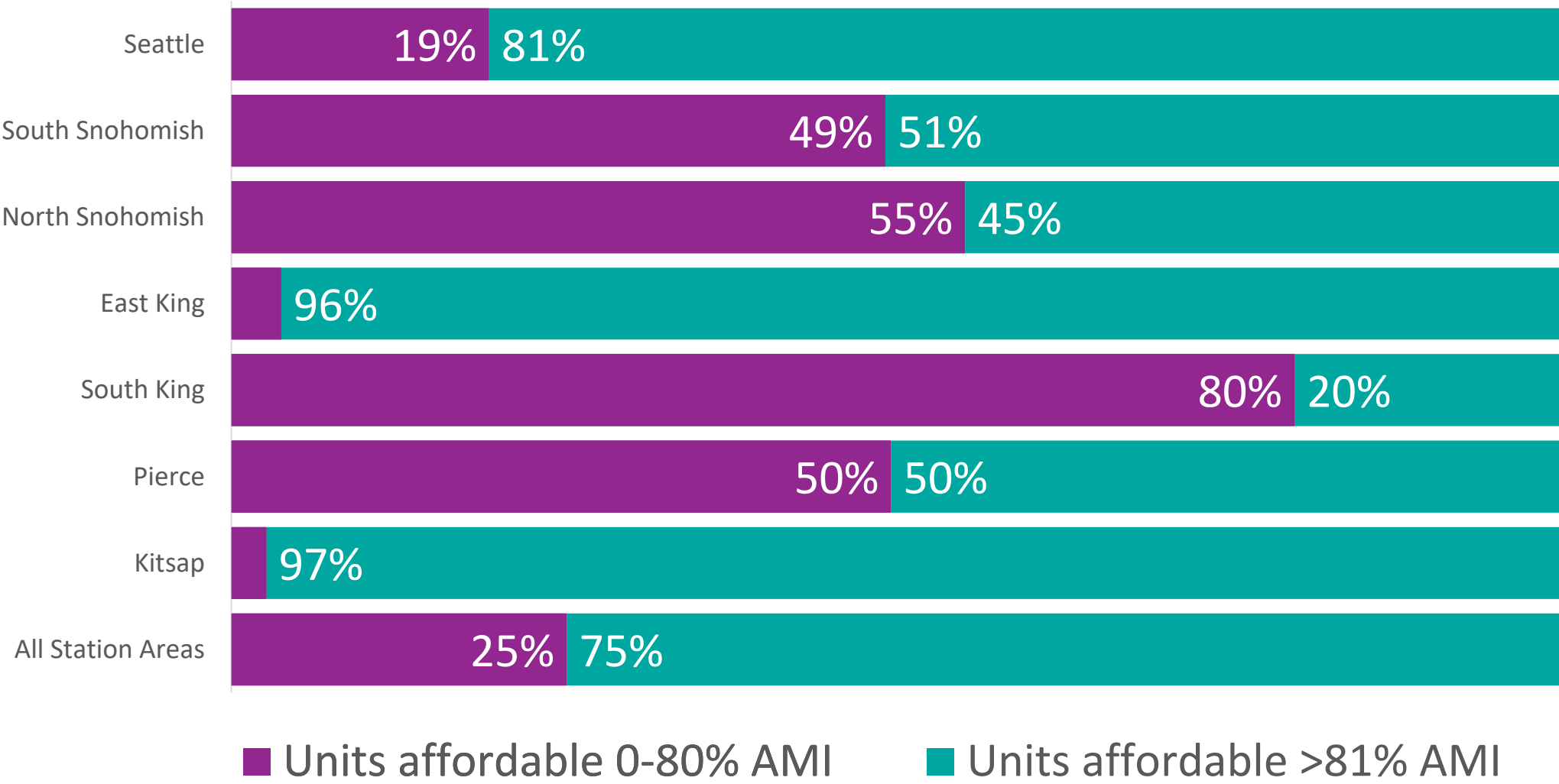
Source: Dupre + Scott Spring 2017 Apartment Survey







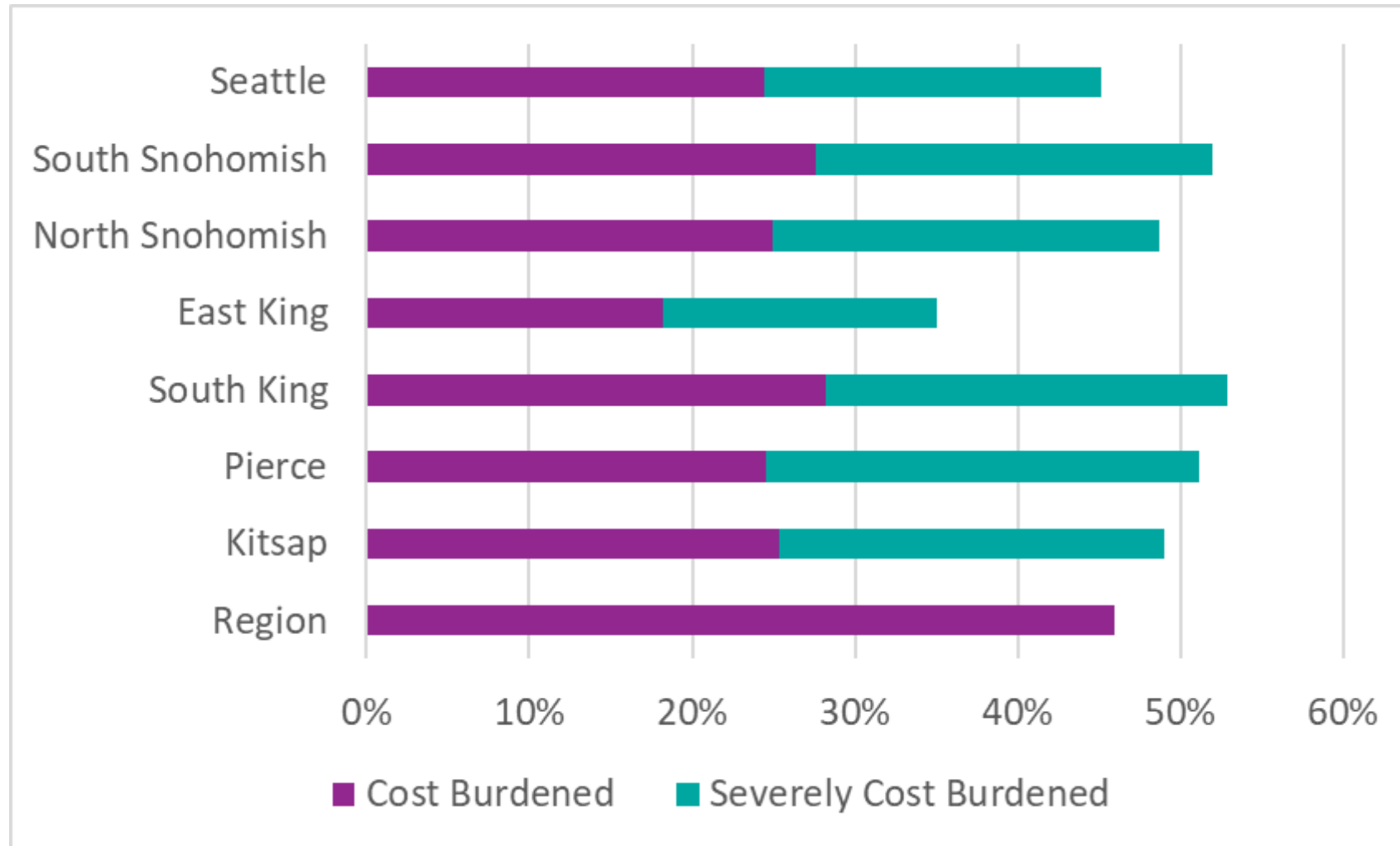
# Market-rate rental affordability differs greatly by area



Source: Dupre + Scott Spring 2017 Apartment Survey



## Cost burden greater in transit communities than the region overall



Source: 2015 American Community Survey 5-year estimates



# Who works in station areas?

From 2010-2015, 37% of regional job growth occurred in station areas





# Jobs in Station Areas



**+98,156**

**+20%**

**520,209**

**30% of region's jobs**

**2010**

**600,365**

**31% of region's jobs**

**2015**





# Many station areas serve as employment hubs



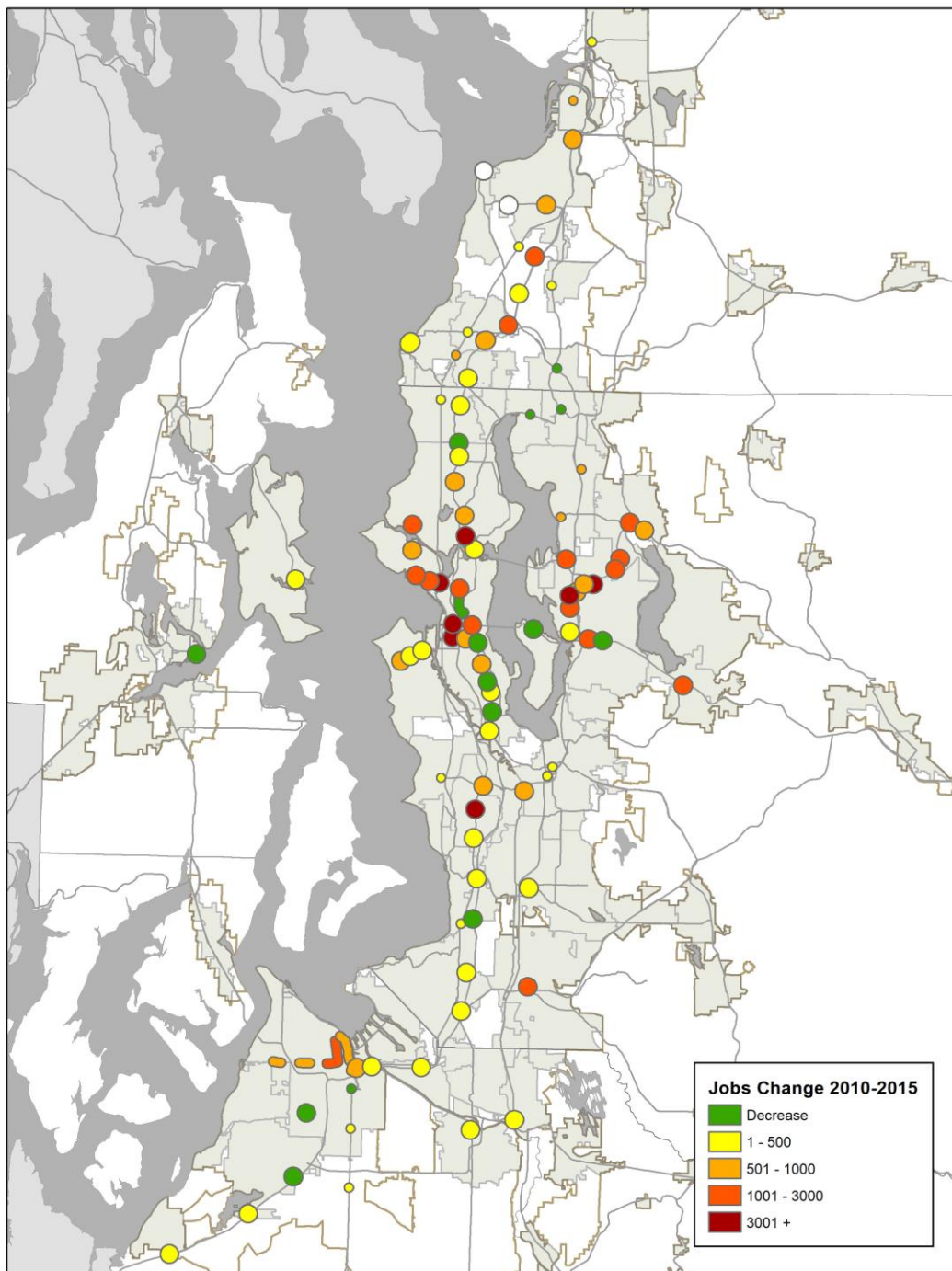
- The map shows the total numbers of jobs in station areas in 2015
- Established employment hubs continue to grow: **South Lake Union, Downtown Bellevue, U District**
- Jobs in station areas + jobs in downtown Seattle = **40%** of the region's jobs

Source: PSRC covered employment database 2015



# Job growth varies across the region

- The map shows the absolute change in jobs in station areas from 2010 to 2015
- Of the top 10 fastest growing station areas, only **4** have HCT online
- Station areas with higher population growth rates did not see similar growth in jobs, with the exception of Seattle and Bellevue



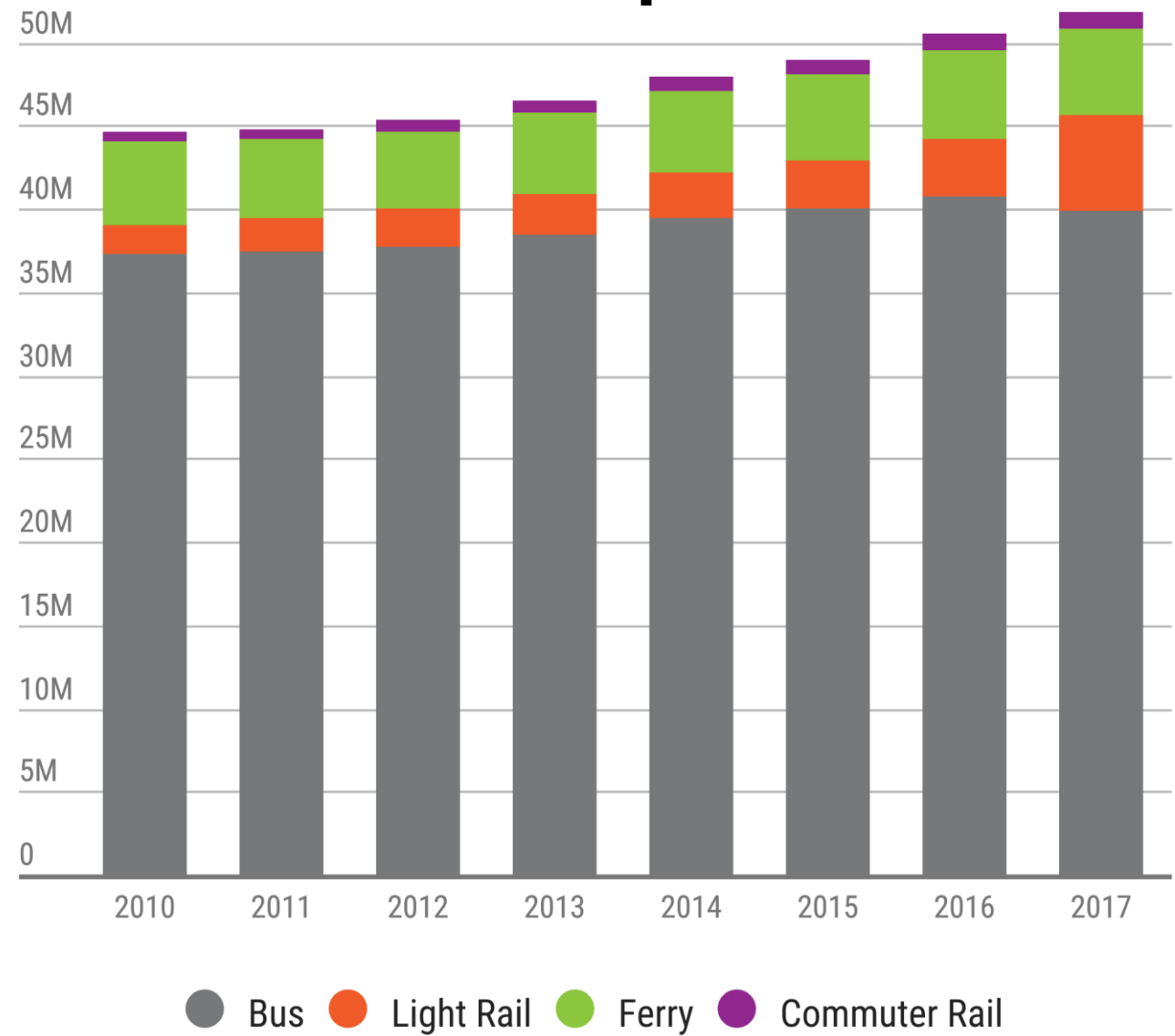
Source: PSRC covered employment database 2010, 2015



# How are people traveling to and from station areas?



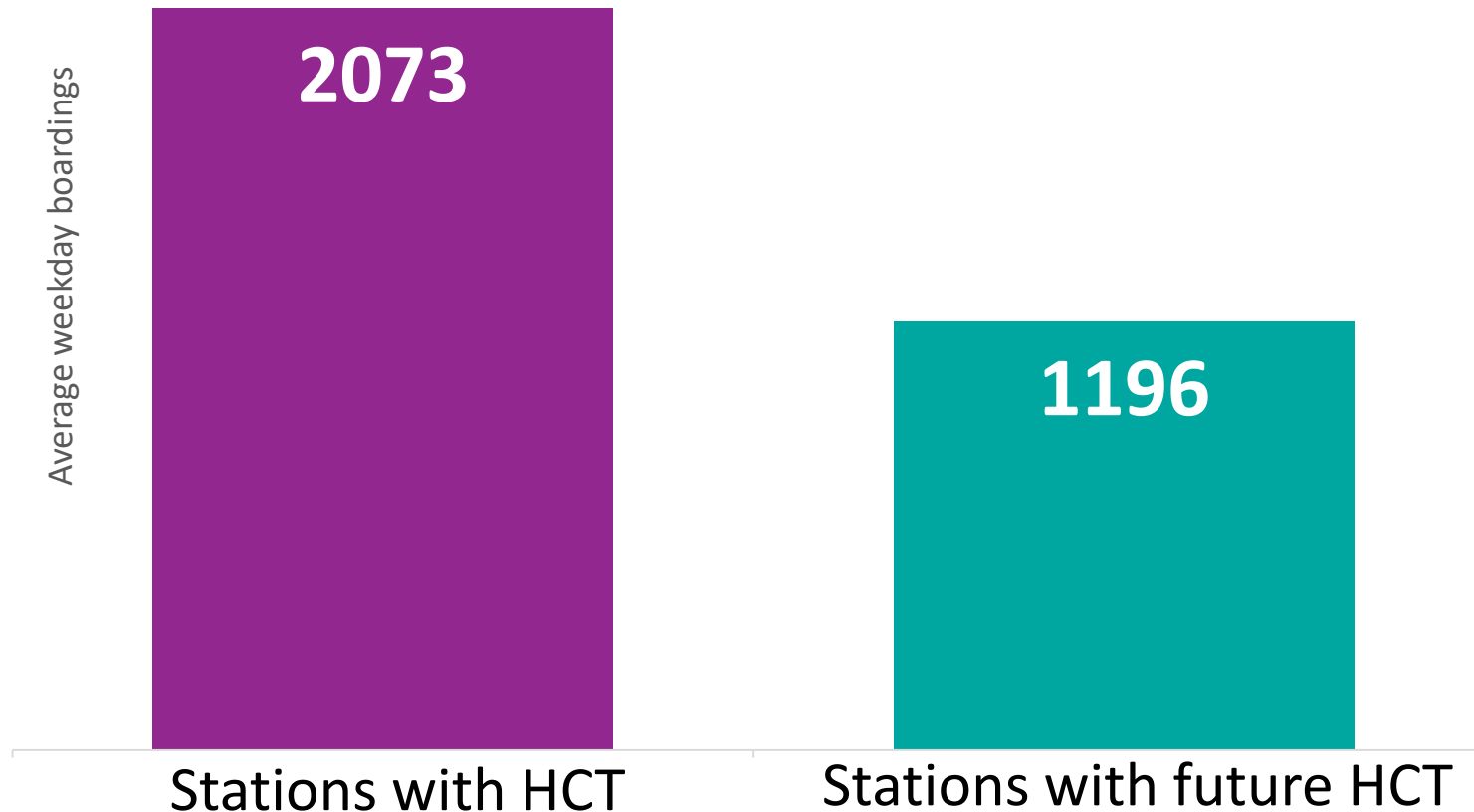
# 2017 is the 7<sup>th</sup> straight year of increased regional transit ridership



Source: Spring 2016. PSRC, King County Metro, Community Transit, Pierce Transit, Everett Transit, Sound Transit



# Station areas with existing High Capacity Transit have nearly twice as many boardings as those without



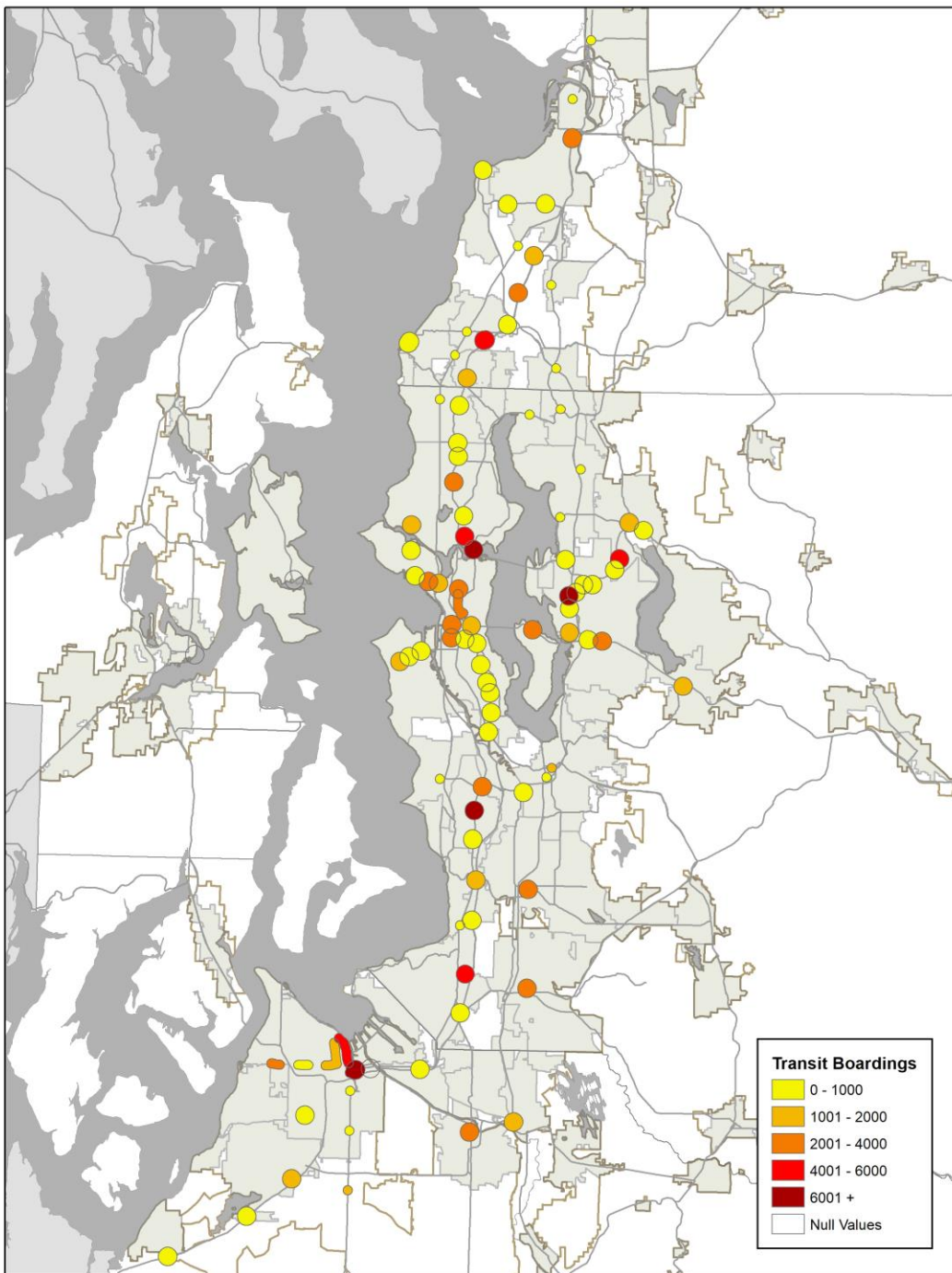


# Average weekday boardings

- The map shows the total number of transit boardings at stations areas in 2016

## Ridership reflects

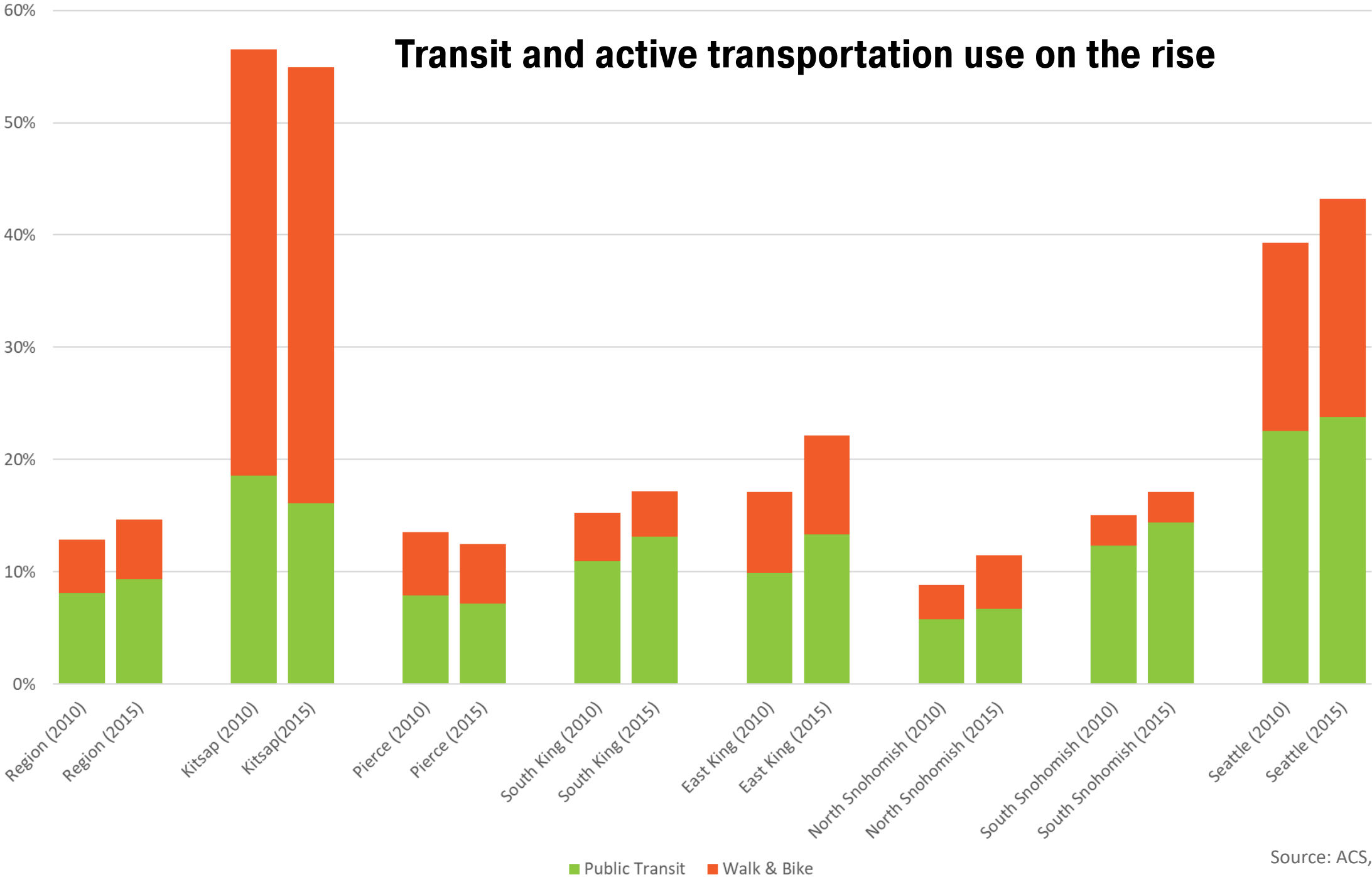
- Where HCT currently exists:  
**Capitol Hill, Tacoma**
- Existing transit centers:  
**Downtown Bellevue, Tacoma Dome**
- Nearby housing and employment centers:  
**UW Station, SeaTac Airport**



Source: Spring 2016. PSRC, King County Metro, Community Transit, Pierce Transit, Everett Transit, Sound Transit



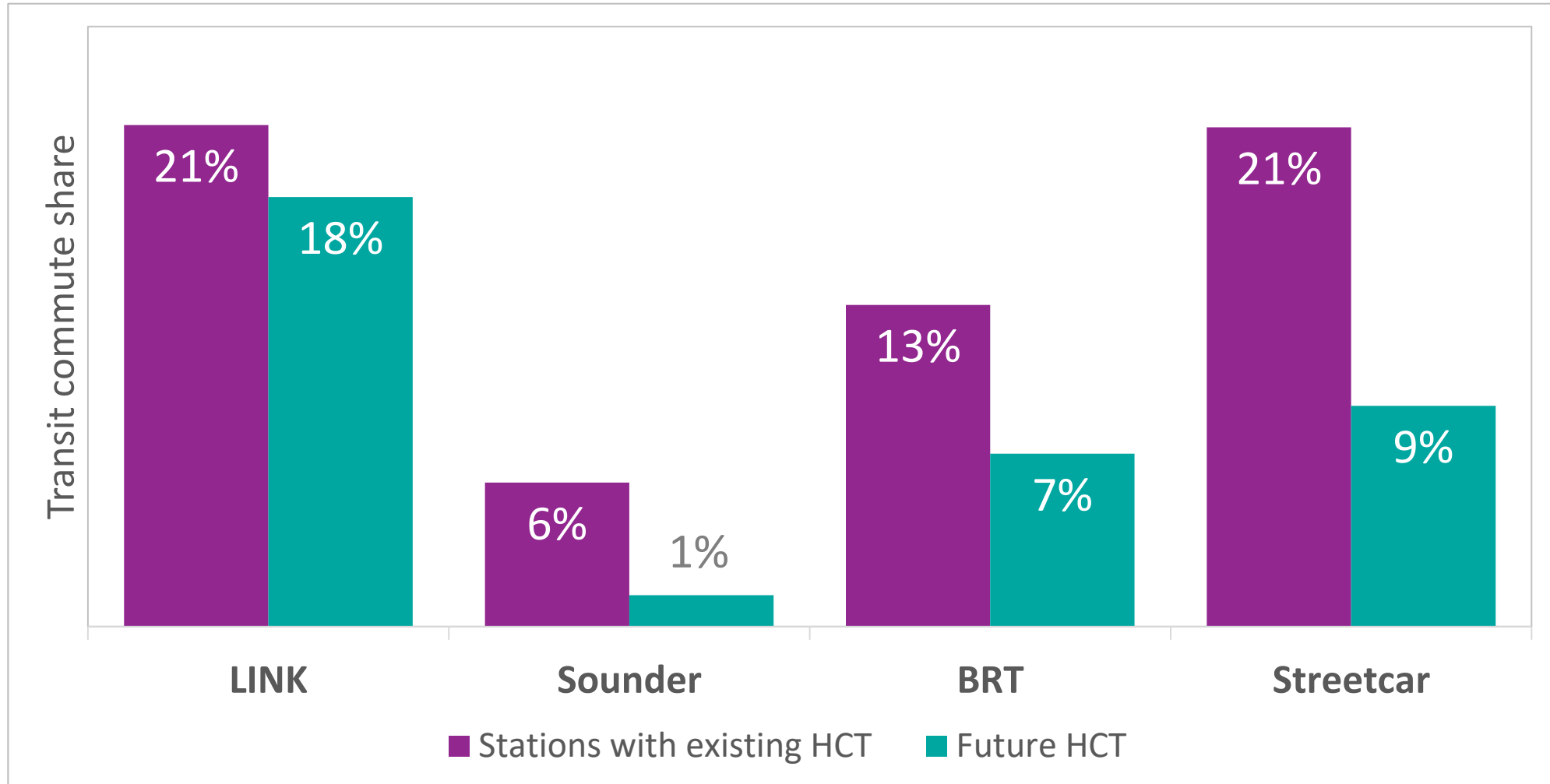
# Transit and active transportation use on the rise



Source: ACS, 2015



# More residents of existing LINK and streetcar station areas commute by transit



Source: 2015 American Community Survey 5-year estimates

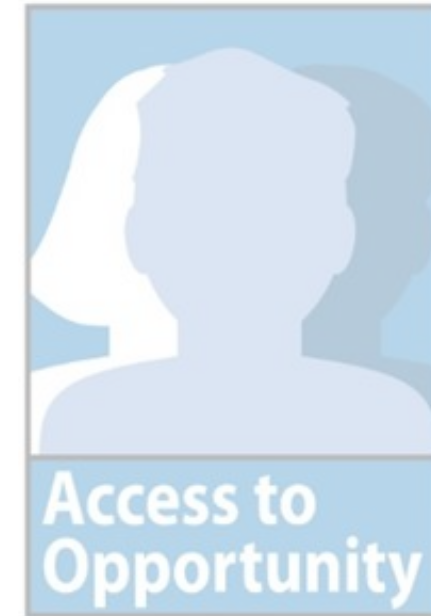


# Part 2: Implementation Monitoring

Are we *doing* what we said we would do?

The following slides highlight policies and action undertaken by counties, cities, transit agencies, and other partners that help to implement the Growing Transit Communities Strategy.





**Goal:** Attract more of the region's residential and employment growth to high capacity transit communities.



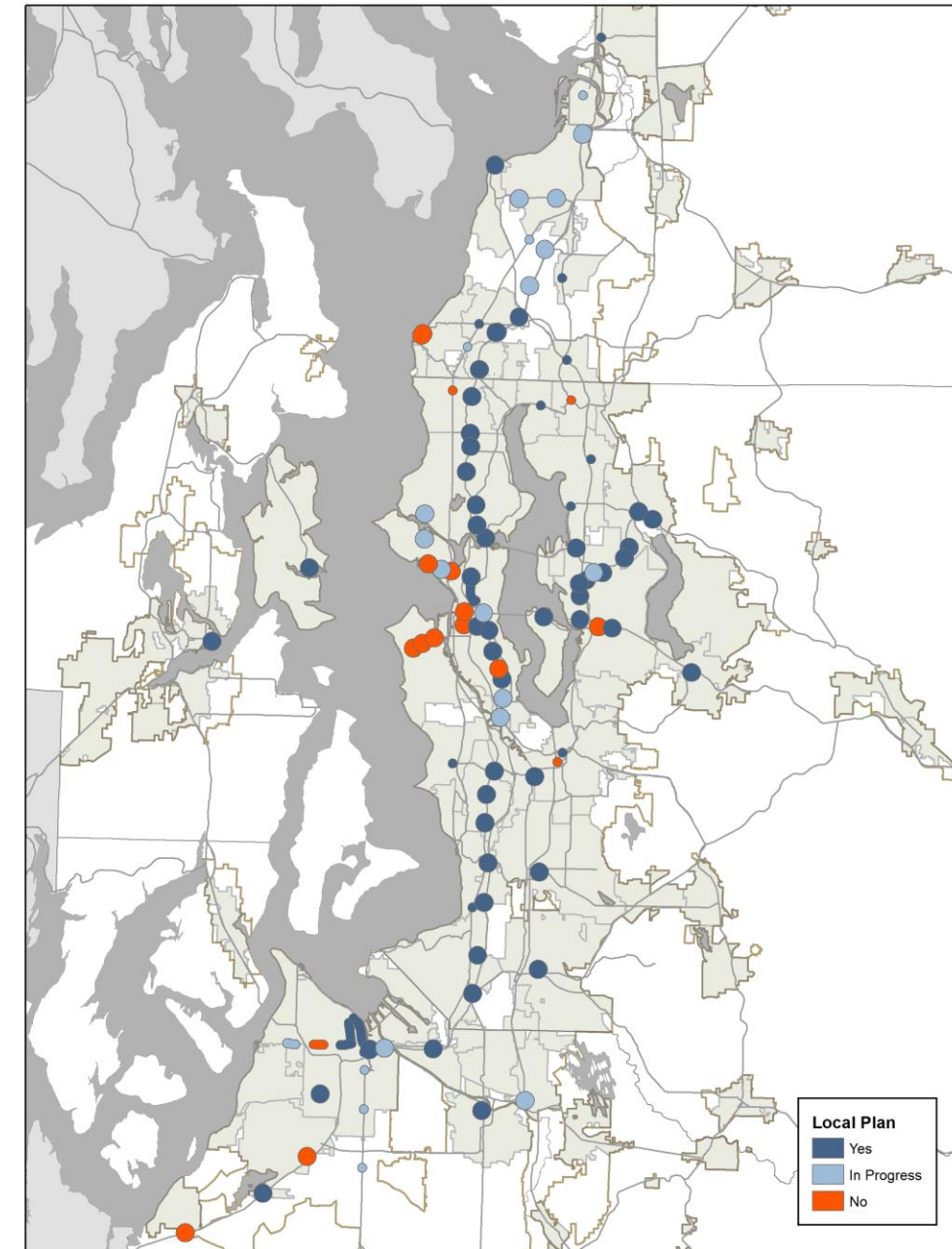
# Local TOD planning

Cities and counties have developed and updated plans for public and private improvements to further successful transit station areas.

**55%** of station areas have adopted subarea plans. This includes all operating Link Light Rail stations and several BRT stations. Some of these plans were adopted before transit came on line while others focus on TOD.

**23%** of station areas have plans in development. This includes many stations included in ST3 and the expansion of BRT lines in King, Pierce, and Snohomish Counties.

**22%** of station areas do not have subarea plans. This includes stations planned to open after 2035.



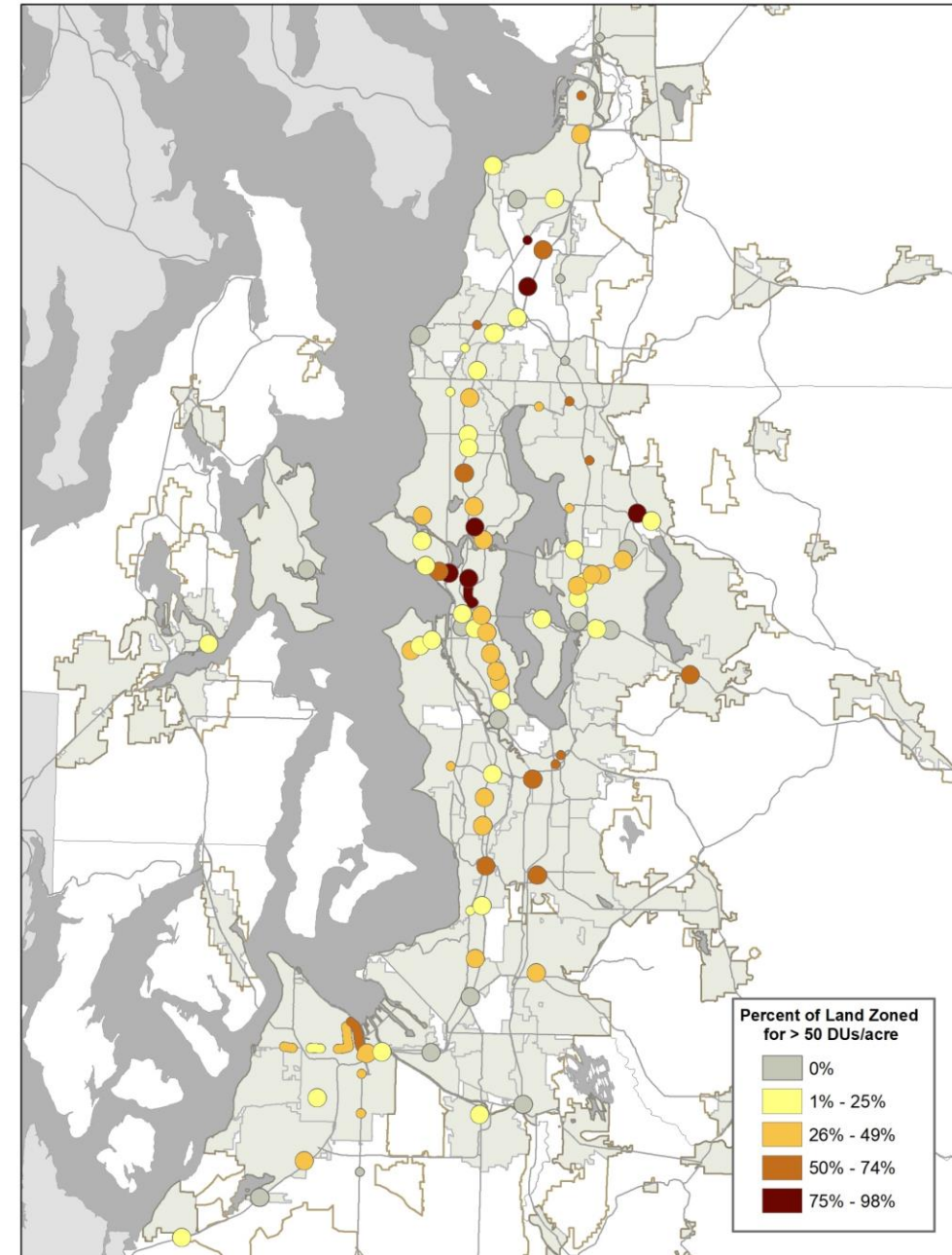
Source: PSRC

# Transit-supportive land uses

- A 2015 PSRC guidance paper summarizes research on transit-supportive densities and uses to recommend a framework for setting and achieving density goals involving regional, transit agency, and local governments
- Newly adopted comp plans provide updated data on what uses and densities cities and counties are planning and zoning for in station areas
- Transit Corridors Zoning Profile: Study Areas Grouped by Percent of Land Zoned in Following Categories:

| Zoning    | 0 - 25% | 26 - 50% | 51 - 75% | 76 - 100% |
|-----------|---------|----------|----------|-----------|
| MU / MF   | 32      | 30       | 22       | 12        |
| >50 du/ac | 45      | 29       | 12       | 10        |
| SF        | 53      | 20       | 18       | 5         |
| Com / Ind | 60      | 18       | 14       | 4         |

Source: PSRC



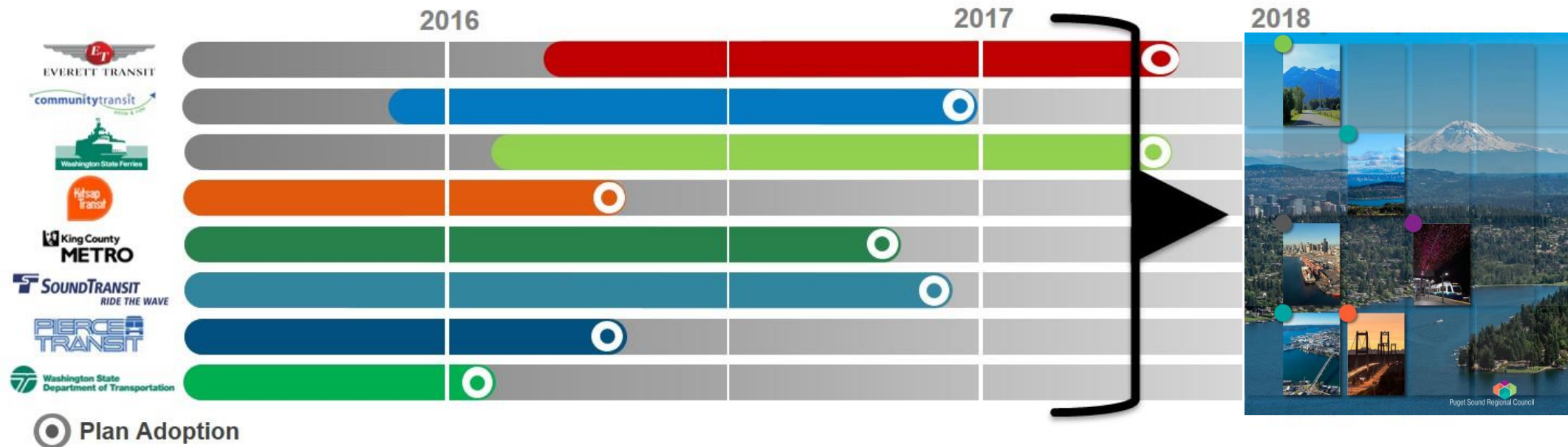


# Long Range Transit Planning



## Transit Agencies created or updated their Long Range Plans

- Sound Transit developed its third system plan ([ST3](#)) expanding transportation investments throughout the region into 2041
- Other transit agencies developed or updated their long range plans, integrating with ST3 and building upon recent experiences with rail-bus integration

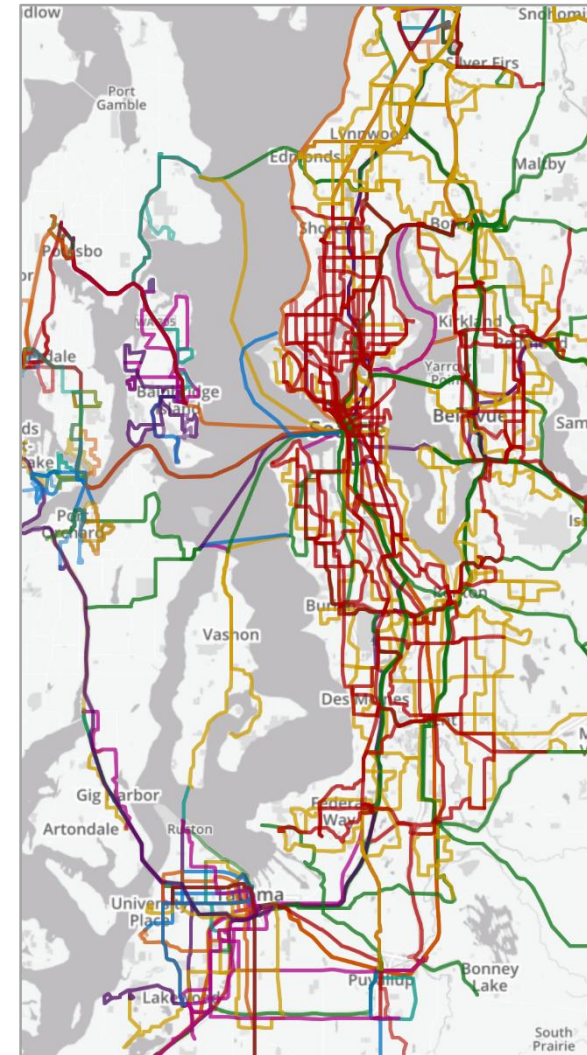


# 2040 Integrated Transit Network



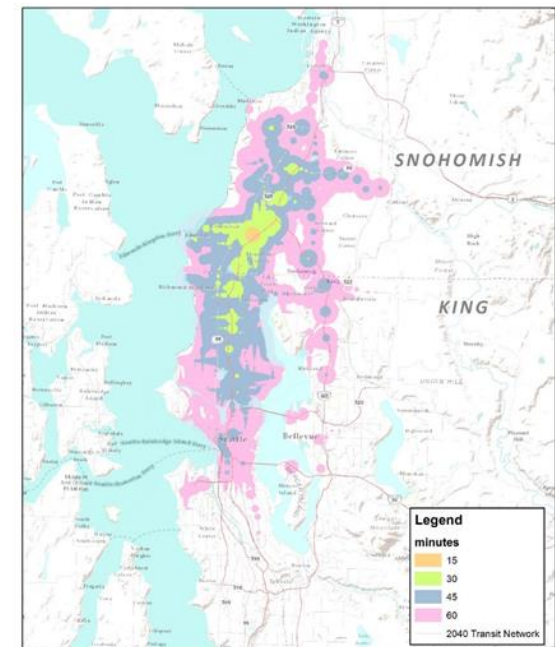
- PSRC built off of transit agency long range planning to develop an integrated transit network for inclusion in the [Regional Transportation Plan](#)
- Using a common sketch planning software (Remix), agencies are able to better integrate systems allowing rail, bus, and ferry services to support each other
- The new transit network provides a better understanding of mobility benefits for customers and agencies

## DRAFT 2040 Transit Network



Source: Puget Sound Regional Council, 2017

## Transit Travel Times at Noon 2040



source: Puget Sound Regional Council, 2017



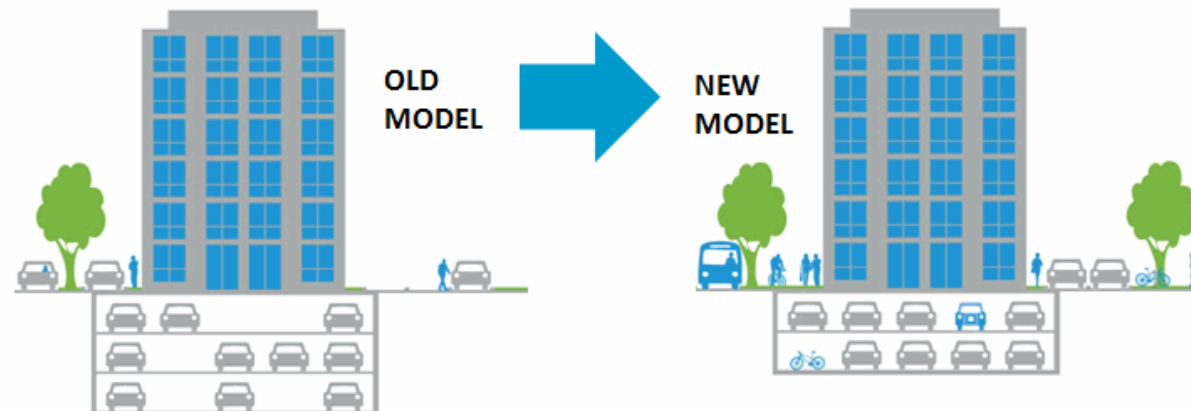
# Innovative parking tools



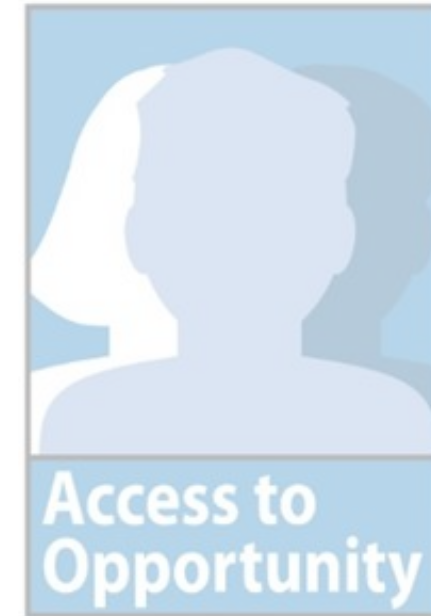
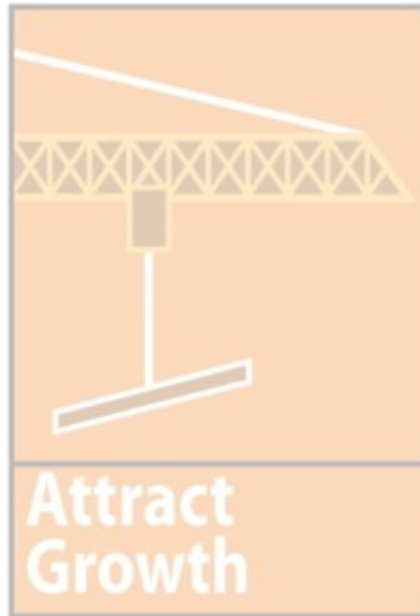
A range of innovative parking tools are available for use in transit communities to support TOD while meeting the limited parking needs of a transit rich environment.

## Example: Shared parking

- Commonly shared between developments with different uses in varying timed parking needs (i.e. residential vs. office), shared parking is one innovative parking tool in the GTC strategy
- The King County Metro [Park & Ride Partnership](#) connects transit riders with market prices park and ride spaces at commercial and multi-family parking near high frequency transit



Source: King County Metro



**Goal:** Provide housing choices affordable to a full range of incomes near high-capacity transit.



# TOD Funding

Several regional and local funding sources for equitable TOD have become available since the adoption of the Growing Transit Communities Strategy in 2014.

## Seattle Housing Levy – 2016

- Passed by Seattle voters in the 2016, the [levy raises \\$290 million](#).
- The selection process prioritizes locations with access to transit and preserving and producing units in HCT station areas.

## Regional Equitable Development Initiative (REDI) Fund – 2016

- The [fund](#) helps finance the acquisition of property along transit corridors to preserve the affordability of future housing and community facilities.

Funding  
in action

**Tacoma Housing Authority – \$4 m**  
loan from REDI fund to redevelop site  
in Tacoma's West End



# TOD Funding

## King County TOD Bond Allocation Plan – 2016

- The [plan](#) will provide up to \$87 million in bonds backed by future hotel/motel tax revenues.
- The selection process focuses on housing within a ½ mile of new or existing HCT.

## Impact Capital

- [Impact Capital](#) provides loans to non-profits that don't typically meet bank lending requirements.
- The initial funding helps to get projects off the ground and attract future investors

Funding  
in action

### Capitol Hill Housing – Broadway

110 units: 8 at 30% AMI; 10 < 50% AMI; 91 < 60% AMI

### Mount Baker Housing Association

\$3.2 m loan to purchase and clean-up 5 contaminated parcels in SE Seattle



# Affordable Housing Incentives

Cities and counties can provide additional development capacity or other incentives in exchange for affordable units, thus ensuring new development contributes to maintaining and expanding the supply of affordable units.

## 18 of the 33 Cities Have Adopted Incentives

The 96 study areas are located in 33 cities. 18 of these cities have adopted incentives to encourage the development of affordable housing in transit communities.

Incentives include: Density Bonus, Fee Waiver, Parking Reductions, and Multi-Family Tax Exemption (MFTE). Several other cities have policies supporting the development of affordable housing incentives but these policies have yet to be translated into regulations.

**Incentives  
in action**

### **City of Renton MFTE**

- 503 units in TOD areas, majority use 8 year exemption with no affordability requirements
- 92 units affordable at 60% AMI, use 12 year exemption

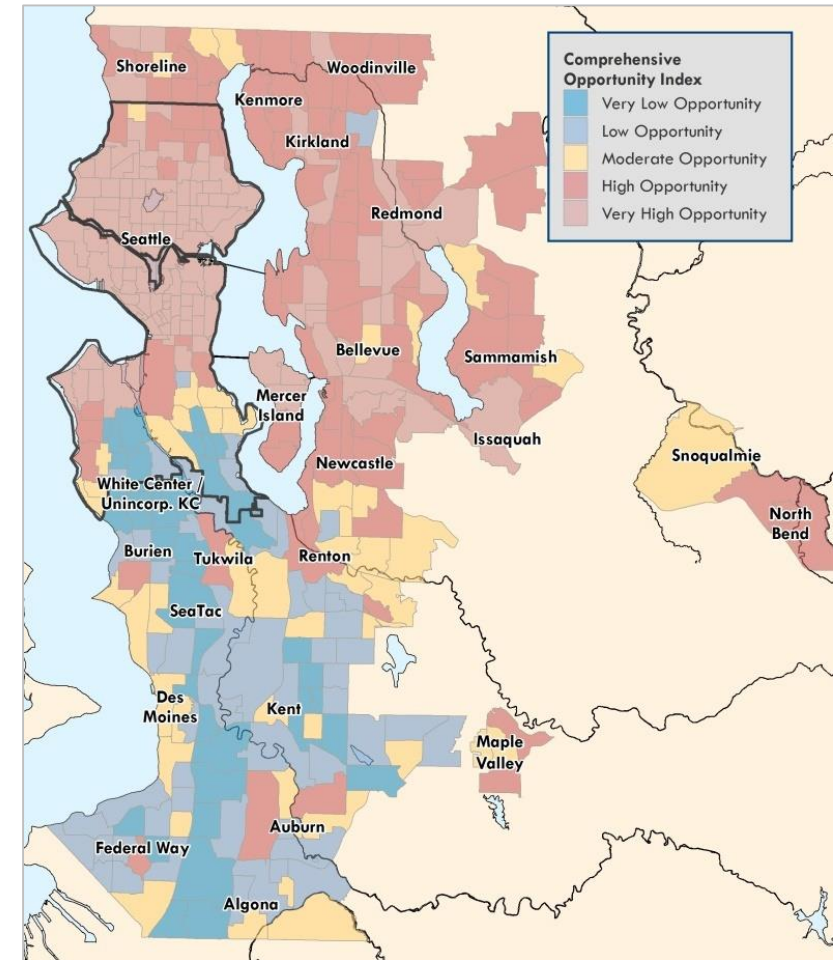


# Housing Choice & Access to Opportunity

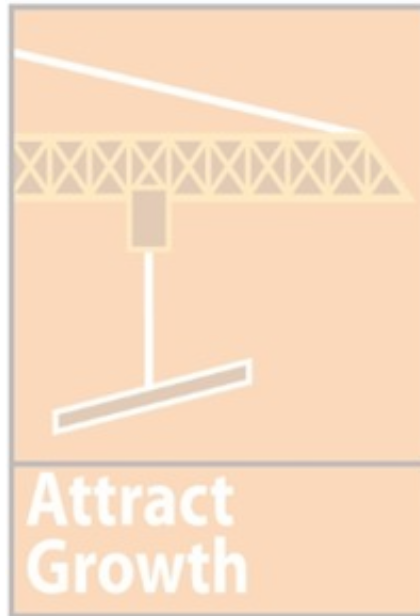
Housing choice is at the intersection of housing affordability and access to opportunity. [Research shows](#) that providing opportunities for low-income residents to move to high opportunity neighborhoods leads to better outcomes for all residents.

The [King County Housing Authority](#) runs several programs to provide better access to high opportunity neighborhoods.

- Site-based affordability strategies such as purchasing older mid-rise developments in higher opportunity areas.
- Tenant-based mobility strategies such as increasing the value of vouchers in different parts of the county to account for varying rental prices.







**Goal:** Increase access to opportunity for existing and future residents of transit communities.

# Economic Vitality and Opportunity

While the economic development inherent to attracting growth will help support vibrant transit communities, additional strategies are needed to attract and retain existing and local-owned businesses and to link transit community residents to family wage jobs.

## Seattle's Equitable Development Initiative

- [The City of Seattle](#) actively engages with organizations representing historically underserved communities and communities at risk of displacement to develop economic opportunities
- Driven by nonprofit developers and community groups, the five planned initiatives are funded by foundations, city, state, private investors, and Seattle's newly-adopted short-term rental tax
- The Rainier Beach Food Innovation district supports a community initiative aimed at clustering employment and educational opportunities around the light rail station

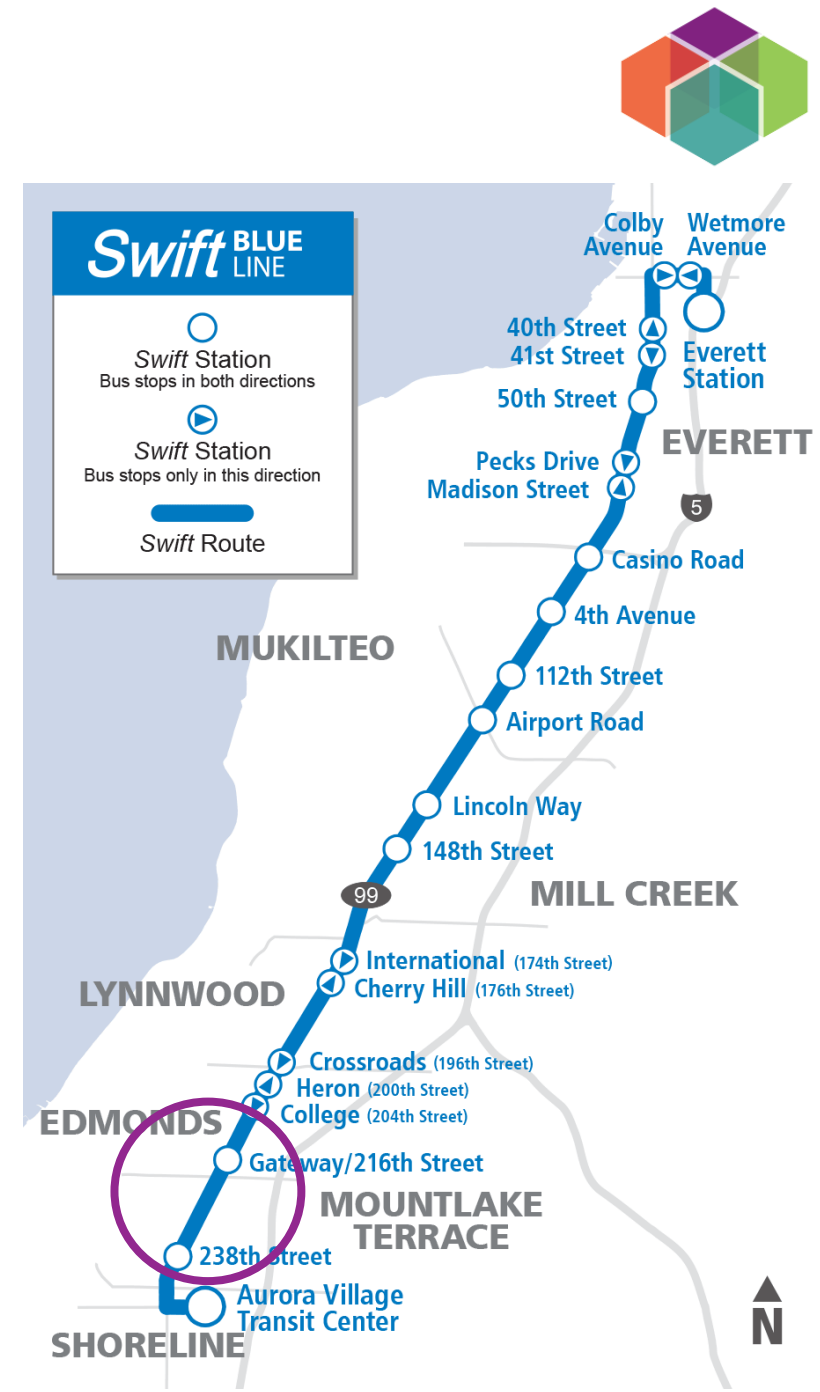
In action

# Multimodal Mobility Options

Local jurisdictions and transit agencies are developing partnerships regionwide to provide multimodal access to transit. Investments in these communities allow greater access to education and employment, promote public health, and reduce transportation costs.

## Edmonds Highway 99 Subarea Plan

- Hwy 99 provides high capacity transit connections through the region and a link to the Mountlake Terrace Transit Center and future LINK light rail station
- Pedestrian improvements, including sidewalks and street lighting, on neighboring residential streets allow people to walk safely and comfortably at all times of day
- Intersection improvements improve multimodal connections to enhance safety along Hwy 99





# Affordable Mobility Options



## ORCA Lift

- Started regionally in 2015, [ORCA Lift](#) provides up to 50% reduced fares for customers with low incomes
- Building off a programs started by Kitsap Transit, ORCA Lift provides up to 50% fare savings for customers with low incomes
- Reduced fares are available on Kitsap Transit; King County Metro and Water Taxi; Seattle Streetcar; Sound Transit buses, LINK light rail, and Sounder Trains



# Access to Education



There is a growing trend to expand community colleges and satellite campuses as the region grows. Expansion in alignments with high capacity transit allows increases access to these high quality educational opportunities.

## WSU Everett

- [New campus](#) can accommodate up to 1,000 students and enhanced focus on degrees in aerospace and engineering
- Served by frequent bus lines along a transit emphasis corridor and possible future Community Transit SWIFT BRT corridor from Everett to Smokey Point



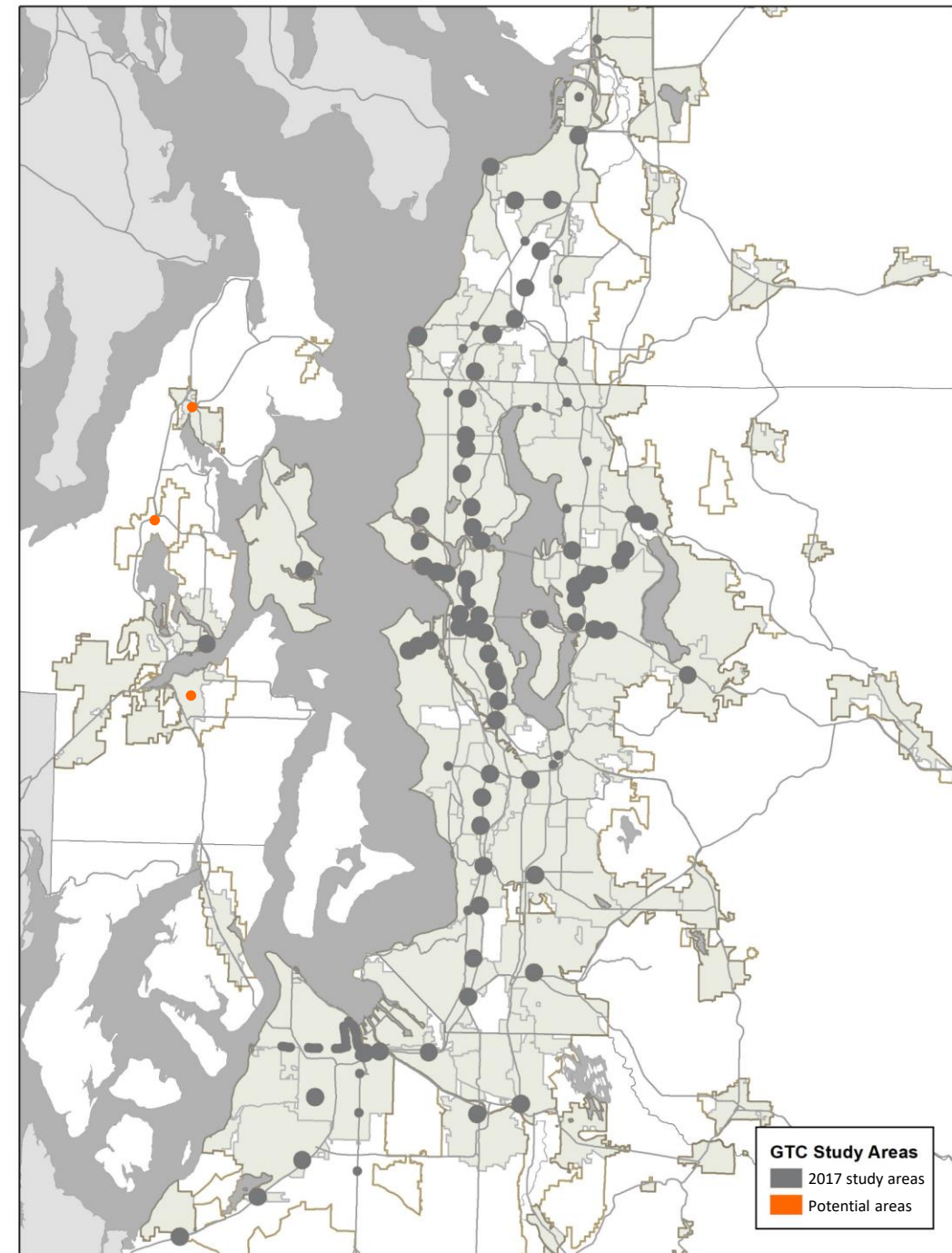


# Report Updates

The monitoring report will be updated and expanded based on data availability.

Potential study areas to be added in the next update include:

- Poulsbo (BRT)
- Silverdale (BRT)
- Port Orchard (BRT)





The Puget Sound Regional Council, [Regional TOD Advisory Committee](#), and local partners will continue to work to implement the Growing Transit Communities Strategy.

Please contact the PSRC staff listed below with questions or requests for data.

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**Thank you**



Puget Sound Regional Council