



SPOKANE HOUSING^{AND} ECONOMIC REPORT

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NOVEMBER 2015

Prepared for the:
Downtown Spokane Partnership
Parking and Business Improvement District
The University District Development Association



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EXECUTIVE SUMMARY

INTRODUCTION

The City of Spokane in Spokane County, Washington, features an historic downtown and a University District (UD) with a strong economic base driven by medical and health sciences, education, and technology. The City offers a wealth of cultural amenities attracting both local and regional visitors to experience many popular activities. The rich historic heritage in the City is exemplified by the original Davenport Hotel built in 1914, and the adaptively-reused Steam Plant Square's iconic 225-foot twin stacks in the heart of downtown. Attracting visitors from across the nation, the City hosts several notable events such as Bloomsday, a 7.5-mile race drawing more than 50,000 runners worldwide, and Hoopfest, the nation's largest 3-on-3 basketball tournament with 250,000 spectators and participants. Local residents can enjoy the many activities at Riverfront Park, featuring a 1909 Carousel beside the Spokane River, while visitors can also experience the spectacular view of the Spokane Falls on the Park's Gondola skyride. Spokane is the region's center of entertainment; coupled with the downtown art district and the up-and-coming "hip" urban restaurant scene, both local residents and regional visitors can enjoy the City's high quality of life and natural outdoor amenities throughout the year.

The University District is anchored by Gonzaga University, with nearly 7,500 students, which offers 43 undergraduate degree programs and seven different schools at the graduate level. Gonzaga is continually upgrading its campus facilities and programs, adding a new University Center in 2015 and with plans for a new science center and performing arts theater in 2016. In addition, the UD has a significant opportunity with the State's approval in April 2015 for a new medical school at the Washington State University (WSU) Spokane campus and the approval of state funding for a pedestrian bridge linking the Medical Sciences campus with the South University District revitalization area along the Sprague Avenue Corridor. The medical school will add a significant level of student and faculty activity to the campus. The updated Master Plan for the combined WSU and Eastern Washington University (EWU) campus anticipates further development of up to 490,700 sq. ft. of additional campus facilities during the 2014-to-2024 period.

In addition to the on-campus development and the potential for residential and commercial development south of the campus, the Master Plan highlights the opportunity in the "College Town" area for mixed-use economic development, including campus and community amenities, retail and housing to support the campus. This area, which is west of the campus and serves as a transition to downtown, has already seen an influx of vibrant new businesses and entertainment venues and is becoming an exciting living environment. Planned improvements to Division Street will further support growth of this area as an urban mixed use node with a high quality of life.

The City and private business have made concerted efforts to invest in the downtown district (Downtown), the Business Improvement District (BID), and the University District (UD) (collectively, the "Study Areas"), to provide desirable opportunities for residents and workers to live, work, and play. The City formed the University District Revitalization Area with a commitment to invest some \$43.6 million by 2035 to improve infrastructure and community amenities. With strong economic and industry sectors based in education, medical and health science, and advanced manufacturing, steady

growth continues to position the City as one of the strongest submarkets in the region. Recent higher density multifamily developments such as Kendall Yards further indicate healthy market demand for more residential development. In addition, the new 700+ room Davenport Grand hotel and convention center across from the INB Performing Arts Center provide additional accommodations for regional visitors to enjoy the City's rich historic and cultural amenities.

REGIONAL CONTEXT

Located at the Eastern border of the State of Washington, the City of Spokane includes 60 square miles of land nestled in the heart of Spokane County. It is located approximately 20 miles from the Washington-Idaho border along the Spokane River and Interstate-90 ("I-90"). The City is often referred to as the "Lilac City" and is the second largest city in the State with a population of 212,300 as of 2014. The City is situated adjacent to Fairchild Air Force Base and is served by the Spokane International Airport located approximately five miles from downtown. There are several distinct districts such as the UD, Medical District, Davenport Arts District, and historic districts in both the west and east ends of Downtown. The presence of notable public and private universities and a strong medical network is gradually shifting the traditional industrial and manufacturing base toward a medical health science, education, start up and advanced manufacturing economy. In the context of the larger region, the City is located about 300 miles east of Seattle.

A number of significant developments and capital improvement projects have been completed or are underway in the Study Areas, reflecting just a portion of the total public and private investment occurring throughout the City:

- **Kendall Yards.** A new 78-acre residential mixed-use development located to the north of downtown Spokane, and adjacent to the Spokane River, Gorge Park, and Centennial Trail expansion. This project has been very successful in its early phases and is planned to include 1,088 residential units and 700,000 sq. ft. of retail and office space at build out. As of October 2015, 182 apartments have been built and occupied and 161 homes sold, with another 31 homes pending sale or under construction. In addition, 53,000 sq. ft. of commercial space has been constructed.
- **Davenport Grand Hotel by Marriott and Spokane Convention Center Expansion.** The Spokane Convention Center added 91,000 sq. ft. of meeting and event space in 2014 and now offers nearly 200,000 sq. ft. of exhibit, ballroom and meeting space. This new hotel directly across the street from the Center has 716 rooms that cater to business travelers, visitors, and leisure travelers and will serve as an anchor for activities along the downtown's retail and entertainment district. It includes more than 25 meeting rooms, a 19,000-sq.-ft. ballroom, and 929 parking spaces.
- **University District Pedestrian Bridge.** This critical circulation improvement will cross Martin Luther King Jr. Way and the rail lines to provide a pedestrian connection from the university facilities on the north to the South University District area. The south landing point for this bridge will become a key development opportunity, along

with a number of sites along the Sprague Avenue corridor which can develop with residential and commercial projects to support the growing student population.

- **Riverfront Park.** The \$64 million Riverfront Park revitalization, which is expected to be completed in spring 2019, includes new pedestrian access, expanded open space for special events, multiple entrances and access points to the Park, outdoor entertainment spaces for local residents and visitors to enjoy the outdoor amenities, i.e., family ice rink and major renovations to the U.S. Pavilion. The park is situated on the second largest urban waterfall in the continental U.S.
- **Huntington Park Revitalization.** Completed in 2014, the Huntington Park master plan has developed a pedestrian corridor connecting Post Street adjacent to City Hall with Riverfront Park. The pedestrian corridor has new plantings, seating areas, water features, and enhanced landscaped green spaces. The park was paid for by Avista Utilities as a gift to the City in its 125 anniversary year.
- **Division Street Redevelopment.** The arterial corridor connecting I-90 to downtown, and extending north across the river to Sharp Avenue, is planned for upgraded streetscapes and other enhancements to beautify the landscaping and increase connectivity. The beautification project began construction in 2015 with \$600,000 in improvements to off-ramps and entryways, and another \$3.6 million grant will fund completion of the project by 2017.
- **Central City High Capacity Transit Line.** The 6-mile Central City Line (CCL) route between Browne's Addition and Spokane Community College will connect downtown Spokane with the UD and improve mobility throughout the transit network. The local matching portion of the \$72 Million Spokane Transit capital improvement project is funded in the 2015 state-wide transportation package. Service is expected to begin in 2020 and the project is financed mainly by federal, state, and local grants. The CCL will improve future transit and infrastructure connections and will help streamline operations at the STA Plaza in downtown Spokane. Additionally, an economic impact assessment by EcoNorthwest estimates that the project will elevate land and improvement value in areas along the route by \$175 million over a 20-year period.

SUMMARY OF FINDINGS

The residential market analysis and economic report results in the following conclusions:

OVERALL ASSESSMENT

- **The City is experiencing a shift in demographics to both younger and older age groups.** The university population, defined by an age cohort between 18 and 24 years old, increased by nearly 38 percent between the years of 2009 and 2013. The younger age demographic is more likely to occupy smaller rental units. While the University District expects increased university student enrollments, particularly with the new medical school opening at Washington State University Spokane, little on-

campus housing growth is anticipated, creating a strong opportunity for private development. Over the longer term, the Spokane Regional Transportation Council (SRTC) projects large increases in older populations as well, aged 65+, who will also seek smaller and more convenient housing in the downtown environment. This is exemplified by the recent development of Kendall Yards, which has experienced strong absorption in the past few years with a mixture of couples and singles across the full range of age groups, including older adults and young professionals.

- **The increase in the university age population indicates additional demand for retail, amenities, entertainment, and restaurants in the City.** Both the UD and the downtown area are particularly good environments for development opportunities in mixed-use and retail commercial developments that accommodate the younger generation.
- **Strong regional population and income growth will expand Downtown Spokane's role as the regional retail hub.** Efforts by the City and regional workforce agencies to attract higher paying jobs, as well as substantial population growth in the region, will lead to increases in disposable income and retail development opportunities. The success of the River Park Square retail mall indicates the market success for an anchor retail mall development in the Downtown, and recent retail development projects have outstripped retail market projections. A City-commissioned study at the end of 2014 reported that there were 29 retail projects in the pipeline totaling 657,000 sq. ft. citywide.
- **Potential market support for adaptive-reuse building conversions and mixed-use development is expected to thrive in the downtown and BID area.** A number of examples exist of successful adaptive reuse projects in Downtown and the UD, and new projects have been announced frequently in 2015. Most of these projects include ground floor retail and residential on the upper floors. Some of the projects have also created new office space or renovated old hotels.
- **The expansion of the University academic curriculum and strength of the medical and health science network is expected to drive future industry expansion.** The partnership among universities, regional business corporations, hospitals and medical facilities, and local and regional agencies provides strong support to increase job opportunities, overall wages, and quality of life in the City. The development of a new four-year medical school at the WSU Riverpoint campus will inject substantial spending into the local economy and expansion interest in the UD as a residential as well as employment environment. (The State Legislature approved initial funding to begin the process to develop the Medical School in April 2015. A firm timetable to complete the school has not yet been established.)

SOCIOECONOMIC ASSESSMENT

- **The City of Spokane is positioned to capture a substantial portion of future population growth in the greater region.** The City of Spokane is projected to add

45,814 new residents by 2040, from 208,916 in 2010 to 254,730. Overall, Spokane County is projected to add nearly 165,000 new residents during this time.¹

- **Employment growth in the City is expected to increase significantly.** Although employment growth is not anticipated to grow at the same pace as population growth over the next 30 years, the City is projected to add 24,899 new jobs, increasing the 2010 estimate of 111,044 jobs to 135,943 jobs by 2040. The Downtown and Business Improvement District market areas are projected to add as many as 4,436 of these new jobs and the UD is estimated to add 1,637 of the City's new jobs. Current job growth is occurring at a much more rapid pace, as the region starts to satisfy pent up demand from the recession. Spokane County added more than 6,000 jobs between 2nd QTR 2014 and 2nd QTR 2015, more than three times the long term projected average for job growth.

RESIDENTIAL MARKET ASSESSMENT

- **The Downtown Spokane, Business Improvement District, and UD can capitalize on its affordability.** With 2014/2015 median prices at \$165,000 for existing single-family dwellings, the City offers a very affordable residential market in the region compared to Seattle. For new construction, the median single family price was \$259,226 in July 2015, up from \$235,270 the prior year. These price points, coupled with the relatively low construction costs,² robust medical system and university network, will be attractive to potential residents, as well as private developers who may want to participate in redeveloping Downtown, the Business Improvement District and the University District.
- **Recent mixed use development facilitates increasing housing-density trend.** An increasing trend in multifamily housing absorption in the market, as well as in the number of recent higher density developments such as the Kendall Yards development just north of downtown or the 18-unit high-end Michael Building renovation in downtown, indicate increasing market acceptance for an urban residential lifestyle in Spokane.
- **Rental housing may provide additional opportunities for Downtown development.** The Downtown Spokane's apartment-rental market has seen very low vacancy rates in recent years, reaching 2.1 percent in spring 2015 after a steady decline for several years. Coupled with increases in asking rents projected over the next several years, there will be future opportunity for market-rate apartment complexes located in Downtown. As home prices and rent values continue steady increases in the City, additional market-rate rental apartment projects may be

¹ Spokane Regional Transportation Council, Horizon 2040 Land Use Planning, ADE, 2015. Population information from SRTC and the American Community Survey (ACS) data from the U.S. Census are slightly different. ADE uses the ACS data to discuss demographic characteristics and the data from SRTC for future projections.

² RS Means indicates that apartment construction costs in Spokane are \$143.69 per sq. ft. compared to \$159.69 in Seattle.

necessary to provide affordable housing options to off-campus university students and residents.

- **SRTC's Horizon 2040 forecasts for the county include growth of 46,403 single-family units (31% growth) and growth of 24,670 multi-family units (49% growth).** SRTC forecasts future housing need based on demographic trends and projected employment growth. While the majority of housing units in the 2010 base and the 2040 forecast are single-family, there is a definite trend forecasted in Horizon 2040 towards more multi-family residential. Of the County growth totals, the City is expected to add 22,270 total housing units by 2040, with Downtown projected to add 2,498 units and the University District an additional 2,116 units.

DEVELOPMENT SITE OPPORTUNITIES AND FEASIBILITY

- **Three areas within the Downtown and UD have especially strong development potential.** Based on City identification of vacant sites and planned public and private infrastructure investments, ADE has identified three opportunity areas: Opportunity Area #1) the West Downtown Spokane Historic District area southwest of Riverpark Square; Opportunity Area #2) the neighborhood along West Main Avenue near Division adjacent to the UD, referred to as "College Town" in the WSU Master Plan; Opportunity Area #3) the area adjacent to the south landing of the proposed future UD Gateway bridge connecting the UD across Martin Luther King Junior Way.

STUDY AUTHORS

Advanced Development Economics, Inc. (ADE) is a pioneer in exploring the economic development opportunities that emerge from improving environmental quality. Founded in 1985 by a group of planners and economists from the University of California Berkley's Department of City and Regional Planning, ADE conducted the first comprehensive socio-economic study of a major regional air quality plan in California. ADE also was responsible for one of the first cluster studies identifying and mapping the environmental technology industry. ADE's research and technical expertise in areas such as clean energy, regional business, wage structures, housing, broadband, regional food systems, and the green economy, help communities achieve sustainable prosperity and an improved quality of life.

METHODOLOGY AND ASSUMPTIONS

The purpose of the economic report and residential market analysis ("Analysis") is to assess the residential market potential and support for future development in the Study Areas. The Analysis evaluates the economic and development growth opportunity given market support within the local and regional policy context. The analysis further provides objective evaluations of critical components that influence the City's residential market capacity and potential for additional university housing for the UD, BID, and Downtown. In addition, an overview of the BID's retail market is reviewed as the demand for residential housing influences retail needs and additional services required for the local population.

The detailed Analysis accounts for the socio-economic characteristics of local residential population in recent years, in addition to the projected housing and employment growth within the Study Areas in

comparison to the City and County. The current conditions and future plans of each university are assessed since the universities strongly influence the future labor force. The future growth of specific industries through partnerships among the universities and with regional business groups is important in understanding the current and future labor force of the City. ADE reviewed the City's notable cultural activities and festivities that have historically drawn a significant number of regional visitors to the City. This, in turn, translates into potential increases in visitor spending along with additional support for potential retail and hotel development.

To evaluate the market support for additional residential demand in the Study Areas, ADE reviewed real estate trends using market matrices such as vacancy rates, absorption, and lease and sales rates, in terms of both current and historical performance. The evaluation analyzes future demand and addresses the adequacy of the current market supply. Projected residential housing growth is evaluated using data provided by the Spokane Regional Transportation Council ("SRTC") from the 2040 Horizon Plan, the County's Growth Capacity Area Land Quantity Report, ADE's GIS data, the City's building permit trends, and socio-economic and demographic characteristics.

ADE uses Geographic Information Systems ("GIS") and U.S. Census data to provide detailed assessments of population, employment, age, income, and industry distribution. Future residential potential in the Study Areas is examined based on housing and employment projection data provided by the SRTC. ADE distinguishes the specific Traffic Analysis Zones ("TAZ") that comprise the total land parcels for the UD and the Downtown to examine potential housing unit and employment growth over the next three decades. As part of the analysis for evaluating existing university housing capacity, ADE interviewed University representatives and reviewed current and projected University enrollment, future academic discipline development, and campus facility expansion plans. The information serves as an overview of the current capacity and potential needs for more university on- and off-campus residential housing.

ADE collaborated with Steinberg Architects in Los Angeles to evaluate the local and regional tourist attractions and amenities that typically drive additional retail, commercial, and hospitality development. Steinberg Architects has identified examples of five prototypes for housing typologies that may be suitable for future residential development within the recommended opportunity site areas. The prototypes include adaptive reuse of existing buildings and new construction. Since additional residential development will spur overall service requirements and additional retail commercial needs, ADE reviewed downtown retail market performance data to provide a general overview of the retail market. In addition, an overall assessment of the confluence of activities in Downtown suggests there may be further support for additional mixed-use and/or retail commercial development. The market performance for the office segment is not included in the analysis.

The analysis uses information from the City, local and regional agencies, and real estate industry reports, as well as local site visits and interviews with University representatives and community leaders as the primary data sources. ADE compared multiple data sources on the local Study Areas, City, and County level to inform the Analysis, as well as supplementing the market trend information with brokers, real estate developer interviews, and industry research. The comprehensive evaluation of socio-economic and housing data uses Geographic Information Systems ("GIS") for selected sites in

the Study Areas and the City to quantify the data to provide a more detailed Analysis. These sources include the following:

- U.S. Census
- Longitudinal Employer-Household Dynamics ("LEHD") Data
- REIS Analytics
- Real Capital Analytics
- Urban Land Institute
- American Institute of Architecture
- Growth Capacity Areas Land Quantity Report
- County of Spokane Horizon 2040
- City of Spokane Planning and Engineering
- Universities including Gonzaga University, Eastern Washington University, Washington State University, University of Washington in Spokane, Whitworth.
- Spokane Regional Transportation Council ("SRTC")
- Greater Spokane Incorporated ("GSI")
- Visit Spokane
- Riverfront Park and Recreation District
- Spokane Area Workforce Development Council
- Spokane Transit Authority ("STA")

MARKET AREAS

The Analysis requires evaluating specific market areas in the City and regional contexts, which represent the areas where potential residential development and redevelopment may occur, or from which demand may be generated. To assess the market potential for the specific areas in the City, ADE defines the market areas as follows:

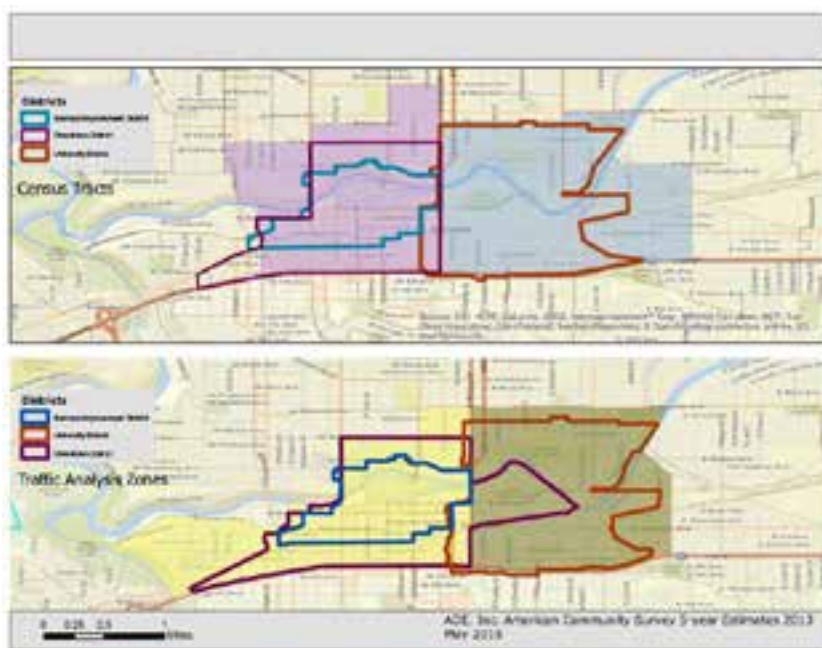
- **Primary Market Areas:** Market areas or "Study Areas" are defined by the boundary of the University District ("UD"), Business Improvement District ("BID"), and downtown Spokane ("Downtown") in the City. To be consistent with the boundary areas defined by the Spokane Regional Transportation Council's Traffic Analysis Zone "TAZ" for the districts, a close approximation of the similar land parcel boundary defined by the U.S. Census parcel area is used. The Business Improvement District and downtown Spokane are identified as one market area using the boundary defined by the downtown area.
- **Secondary Market Area:** The remainder of the City of Spokane, excluding the Primary Market Areas which include UD, BID, and Downtown.

- **Tertiary Market**

Area: The remainder of the greater Spokane County, excluding the Primary and Secondary Market Areas which include the UD, BID and Downtown.

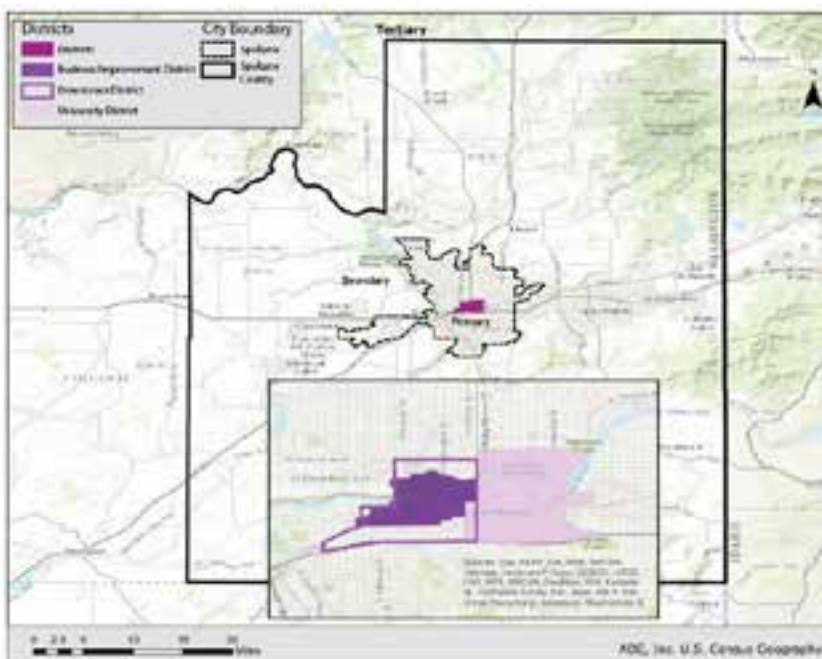
Refer to **MAP 1** for the location of the Study Areas in relation to the City and the regional context. **MAP 2** provides the specific boundaries used for both Downtown/BID and UD from U.S. Census and TAZ defined by the Regional Transportation Council. For the Analysis, the UD and Downtown District market areas are used, and the Business Improvement District is included as part of the Downtown.

MAP 1
MARKET AREAS



Source: ADE

MAP 2
PRIMARY STUDY AREAS



Source: Spokane Regional Transportation Council, U.S. Census, ADE, 2015

SOCIOECONOMIC ASSESSMENT

SOCIO-ECONOMIC CHARACTERISTICS

The City of Spokane, which accounts for 44% of the total population in the County, had an increase in population growth over the 2000 to 2014 period from 195,629 to 212,300 persons, or 8.5 percent. During this 14-year period, the City's population growth was about half as rapid as the County, which grew 15.9 percent.³ In the UD, a majority of the population is university students, with approximately 63% of all residents between 18 and 24 years old. In Downtown, the majority of residents are middle-aged, with 32% between the ages of 25 and 44 years old, and 30% are in the age cohort between 45 and 64 years old.

Appendices A-1 through **A-27** provide a detailed and comprehensive summary of the socio-economic evaluation of the UD, Downtown and Business Improvement District, the City of Spokane, and the remaining region between 2009 and 2013 based on GIS data from the U.S. Census. The analysis is an average of the five-year period and includes detailed population, age, education, home ownership, income, and industry for each U.S. Census block area, in addition to the UD, Downtown and Business Improvement District areas.

POPULATION

The City had the largest population in the County of Spokane in 2010, and is expected to remain the largest jurisdiction in 2040. The population is projected to increase from 208,916 to 254,730 during the period of 2010 to 2040, according to the SRTC's 2040 Horizon Plan. The County allocated 27.8 percent of its population growth to the City, the second highest below the Spokane Unincorporated County Area, which has a 44.9 percent growth capacity allocation. Spokane Valley accounts for the third highest amount of population growth allocation by the County, at 12.06 percent (**Table 1 and Figure 1**).

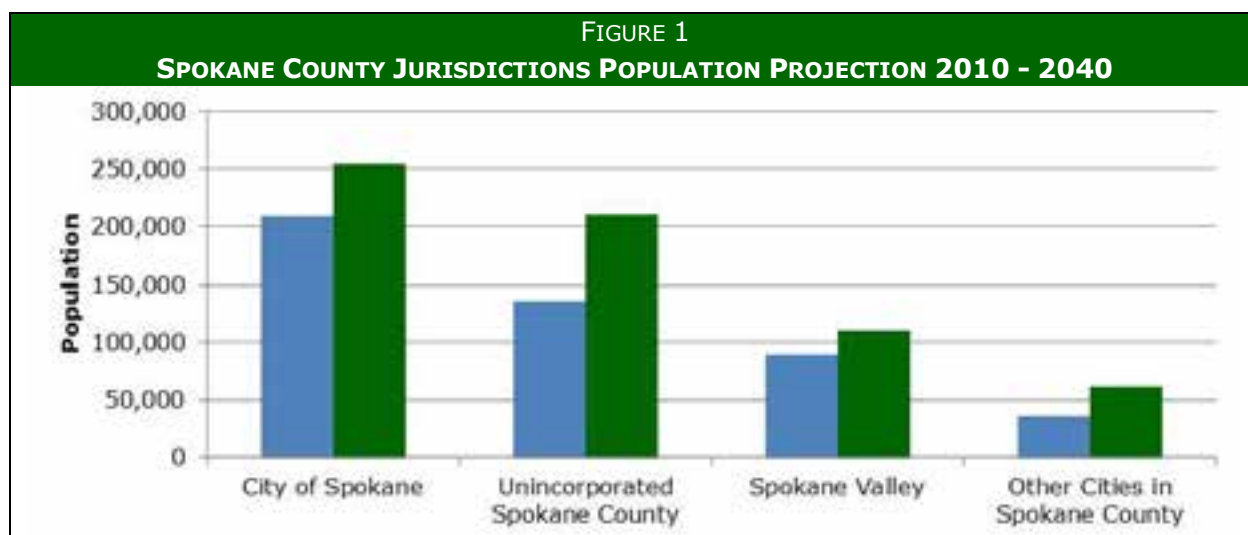
AGE

ADE uses U.S. Census data to examine the demographic age composition for the City between the years of 2009 and 2013 for age cohorts between 0 and 17 years old (newborn to young adults), 18-24 years old (university students), 25-44 years old (Generations X and Y), 45-64 years old (baby boomers), and 65 and above (retirees). Among the age groups, the university student population increased by 37.7 percent, from 14,228 to 19,597. The second largest increase occurred with the retiree age group, at 18.5 percent from 25,611 to 30,343 in the same period. Both the age cohorts of 0-17 and 25-44 years old declined while the baby boomers increased at a more moderate rate of 5.3 percent (**Table 2**).

³ Spokane-Kootenai Real Estate Research Committee, The Real Estate Report, Vol. 39, No. 1, Spring 2015. p. 29.

Table 1 Spokane County Jurisdictions Population Projection 2010-2040				
	2010	2040	CAGR (2010-2040)	% GROWTH OF ALLOCATED BY SRTC
City of Spokane	208,916	254,730	0.66%	27.80%
Unincorporated Spokane County	136,108	210,197	1.46%	44.96%
Spokane Valley	89,755	109,626	0.67%	12.06%
Other Cities in Spokane County	36,442	61,447	1.76%	15.18%
Total County	471,221	636,000	1.00%	100.00%

Source: Spokane Regional Transportation Council, ADE, 2015. CAGR = Compound Annual Growth Rate.



Source: Spokane Regional Transportation Council, ADE, 2015

TABLE 2 CITY OF SPOKANE POPULATION BY AGE 2009-2013							
	2009	2010	2011	2012	2013	CHANGE 2009- 2013	PERCENT CHANGE
Age 0-17	51,426	52,124	52,946	52,585	50,784	-642	-1.2%
Age 18-24	14,228	17,793	18,909	17,598	19,597	5,368	37.7%
Age 25-44	60,980	56,729	58,199	57,194	56,684	-4,296	-7.0%
Age 45-64	50,613	52,752	50,845	51,956	53,312	2,698	5.3%
Age 65 +	25,611	29,934	28,994	30,378	30,343	4,732	18.5%
Total	203,268	209,334	210,107	209,504	210,721	7,453	3.7%

Source: ADE, Inc. American Community Survey 5-year Estimates, 2013

ADE uses The American Community Survey (ACS) to evaluate the demographic characteristics. We compared the population information to that from SRTC, which we have used for future housing projections. The ACS reports a lower number than SRTC, but is used only for the demographic characteristics including total population, age, income, and educational attainment.

A significant proportion of the population growth has occurred in both college age and retiree age groups. These are key renter age groups, with a high concentration of apartment occupants, as

younger people finish their education and enter the workforce and older age groups look to downsize. The University District is a natural market for multi-family housing. Among the 4,633 people living in the UD in 2013, 63 percent or 2,903 were between the ages of 18 and 24. The Business Improvement District and Downtown District, on the other hand, included a higher population between 24 and 64 years of age. About 32 percent of the Business Improvement District's population was 25 to 44 years old and 30 percent were between the ages of 45 and 64 (Table 3).

TABLE 3 CITY OF SPOKANE AND STUDY AREAS AGE DISTRIBUTION, 2013						
CITY OF SPOKANE AND STUDY AREAS	POPULATION	AGE 0-17	AGE 18-24	AGE 25-44	AGE 45-64	AGE 65 +
City Of Spokane	210,721	50,784	19,597	56,684	53,312	30,343
UD	4,633	333	2,903	569	410	418
BI/Downtown District	3,971	229	656	1,264	1,187	635
PERCENT OF TOTAL		PERCENT 0-17	PERCENT 18-24	PERCENT 25-44	PERCENT 45-64	PERCENT AGE 65+
City Of Spokane	100.0%	24.1%	9.3%	26.9%	25.3%	14.4%
UD	100.0%	7.2%	62.7%	12.3%	8.8%	9.0%
BI/Downtown District	100.0%	5.8%	16.5%	31.8%	29.9%	16.0%

Source: ADE, Inc. American Community Survey 5-year Estimates, 2013

INCOME

Household incomes in the Study Areas are directly related to the household retail purchasing power and determine the price ranges in which the population can afford housing. According to the American Community Survey estimates, the median household income in the City averaged \$42,092 from 2009 to 2013. Per capita income in the City was \$23,965, compared to \$10,003 for the UD and \$21,206 for the Downtown, although a portion of the Downtown had a higher income at \$24,920 (**Table 4**).

Regional policy makers have set a goal to increase the proportion of residents with high quality degrees, certificates or other credentials from 40% to 60% by 2025.⁴ This supported by the region's concerted effort to retain university graduates to work in Spokane, and to attract businesses who can pay a premium wage for the local educated labor force.⁵ These efforts will lead an accelerated increase in household incomes throughout the area.

⁴ See www.greaterspokane.org.

⁵ ADE interview with Spokane Area Work Force Development Council, April 9th, 2015.

TABLE 4 CITY AND STUDY AREAS PER CAPITA INCOME			
DISTRICT	CENSUS TRACT	POPULATION	PER CAPITA INCOME
BID/Downtown	530630035001	1,283	\$24,920
	530630035002	947	\$12,533
	530630024001	1,741	\$20,994
Total Downtown		3,791	\$21,206
UD	530630145002	1,326	\$15,634
	530630025003	556	\$18,052
	530630025004	2,751	\$6,113
Total UD		4,633	\$10,003
Spokane		210,721	\$23,965

Note: The per capita income is total average income per person while the median household income is the level at which 50% of households are above and 50% below.

Source: ADE, Inc. American Community Survey 2013

ECONOMIC BASE AND LABOR FORCE

The size and composition of the labor force and employment in the City are in direct correlation with future population growth, demographic trends and educational attainment as well as economic opportunities. Furthermore, the strength of the City's current economy and industry composition is a critical indicator in evaluating potential businesses and future residential development, in addition to the nature of any proposed retail spaces in the UD, Downtown Spokane and the Business Improvement District. The City's close proximity to Fairchild Air Force Base, the abundant medical facilities, and strong university network all play a critical role in shaping the City's employment sectors and labor force composition. **Table 5** shows the City's industries trends between 2002 and 2011.

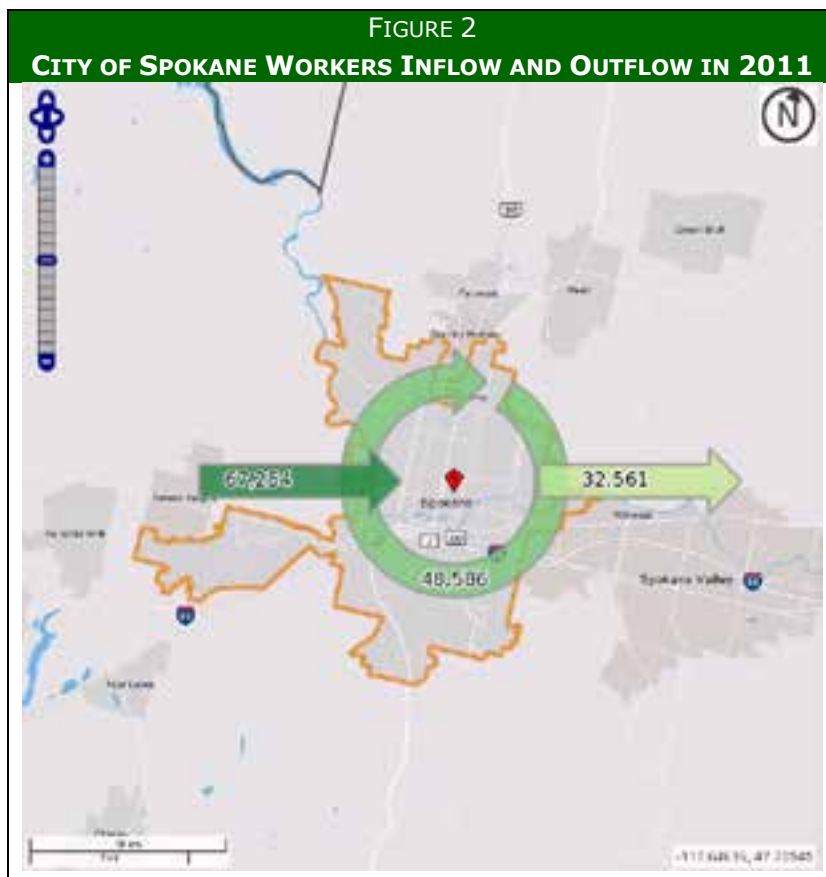
The City's economic drivers consist of the Health Science, Education, Advance Manufacturing, and Professional and Tech Services, as well as other industrial sectors.⁶ Coming out of the recession, health care has led the way with 3,300 new jobs between 2008 and 2011. The retail sector has also rebounded strongly with 1,442 new jobs followed by the management and administrative sector (1,136 new jobs), which portends increasing demand for office space in the City. In addition to these employment sectors, Fairchild Air Force Base has been the largest employer in Spokane County, and has weathered the latest round of Base Realignment and Closure (BRAC) discussions.

⁶ ADE interview with Greater Spokane Incorporated, April 6th, 2015

TABLE 5
CITY OF SPOKANE PRIMARY EMPLOYMENT BY NAICS INDUSTRY SECTOR

NAICS INDUSTRY SECTOR	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	PERCENT OF TOTAL 2011
Agriculture, Forestry, Fishing and Hunting	127	115	121	109	118	143	215	188	180	167	0.1%
Mining, Quarrying, and Oil and Gas Extraction	32	22	17	6	5	16	47	89	68	70	0.1%
Utilities	910	874	865	865	845	836	820	787	818	653	0.6%
Construction	3,981	4,062	4,516	4,384	4,784	5,280	5,277	4,792	3,872	3,753	3.2%
Manufacturing	4,553	4,734	4,545	4,546	4,945	4,855	4,982	4,489	4,067	4,118	3.6%
Wholesale Trade	5,752	5,840	5,720	5,675	5,836	5,996	5,504	5,338	4,946	4,678	4.0%
Retail Trade	14,622	14,906	14,974	15,636	16,097	15,855	15,874	14,698	16,438	17,316	14.9%
Transportation and Warehousing	3,014	2,750	2,743	2,651	2,564	2,305	2,297	2,471	2,436	2,289	2.0%
Information	2,172	2,056	2,332	2,431	2,811	2,677	2,605	2,573	2,694	2,259	2.0%
Finance and Insurance	7,691	7,640	7,872	7,896	8,298	8,300	7,645	7,369	6,933	6,503	5.6%
Real Estate and Rental and Leasing	1,653	1,513	1,522	1,549	1,602	1,644	1,643	1,515	1,602	1,537	1.3%
Professional, Scientific, and Technical Services	4,781	4,888	5,063	4,871	5,211	5,722	6,124	6,270	6,157	6,626	5.7%
Management of Companies and Enterprises	1,692	1,680	1,764	1,723	1,740	1,797	1,864	1,879	2,299	3,000	2.6%
Administration and Support	4,636	4,804	5,623	6,012	6,492	6,237	5,459	4,556	4,820	4,625	4.0%
Waste Management and Remediation	8,005	8,174	8,079	8,157	8,184	8,378	8,315	8,605	8,765	8,521	7.4%
Educational Services	19,265	19,267	19,368	19,340	19,287	19,937	21,907	24,882	25,093	25,232	21.8%
Health Care and Social Assistance	810	894	1,061	1,238	1,122	1,191	1,212	1,083	1,145	1,275	1.1%
Arts, Entertainment, and Recreation	9,358	9,050	9,237	9,715	10,180	10,387	10,726	10,311	10,226	10,679	9.2%
Accommodation and Food Services	5,124	5,048	4,693	4,582	4,667	4,638	4,782	4,802	4,865	4,922	4.2%
Other Services (Excluding Public Administration)	7,096	7,209	7,310	7,222	7,351	7,287	7,817	8,022	8,676	7,617	6.6%
Public Administration	105,274	105,526	107,425	108,609	112,139	113,481	115,115	114,719	116,100	115,840	100.0%
Total											

Source : Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015



Source: Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

Several factors shape the City's current economy and labor force, including: 1) the proximity to major employment centers, including company corporate headquarters and manufacturing centers; 2) the strong health science and medical care facilities in the City, and; 3) the concentration of several notable universities and community colleges within the City. The proximity of several major employers that shape the industrial sector and the labor force in the County contributes to the economic momentum in the city. For example, The Boeing Company in Seattle, an aircraft manufacturing firm in the advanced manufacturing and aerospace industry, has had an estimated 50 percent growth

since 2007. The firm's growth has resulted in growth in supplier industries in Spokane County, from approximately 85 in 2007 to 120 businesses supporting the aerospace manufacturing firm in 2015. This in turn creates more employment opportunities for other peripheral supplier industries. Caterpillar, a heavy machinery manufacturing firm, and Keystone Automation, a manufacturing firm, attribute their location in Spokane County to the presence of the labor force in the City. Other firms such as Thermo King, a climate control product manufacturing firm also located in the county area, play an integral role in employing workers from the City.⁷

Spokane benefits from a regional labor force and employment base, due to the mobility of the labor force. The inflow and outflow patterns of workers that live in or commute to the City indicate a higher number of in-commute workers traveling to the City than out-commuters, with a substantial number of workers both living and working in the City, as shown in **Figure 2**. Furthermore, the trends in worker inflow and outflow over time also indicate the City now captures a higher number of workers who are employed within the City but living outside the City than earlier in the decade. Specifically within the age group of 55 and above, there was a significant increase from 2002 to 2011 in the percentage of workers living outside the City, as shown in **Table 6**. The remaining age groups maintained a relatively steady percentage by comparison.

⁷ ADE interview with Greater Spokane Incorporated, April 6th, 2015

TABLE 6

CITY OF SPOKANE INFLOW AND OUTFLOW JOB COUNTS (PRIMARY JOBS)

ALL WORKERS										
INFLOW/OUTFLOW WORKERS	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Employed in the City	105,274	105,526	107,424	108,609	112,139	113,481	115,115	114,719	116,100	115,840
Employed in the City but Living Outside	53,293	53,795	55,684	56,303	58,813	63,154	63,790	64,691	67,974	67,254
Employed and Living in the City	51,981	51,731	51,740	52,306	53,326	50,327	51,325	50,028	48,126	48,586
Living in the City	82,433	83,278	84,295	86,826	88,951	85,615	87,771	83,958	81,376	81,147
Living in the City but Employed Outside	30,452	31,547	32,555	34,520	35,625	35,288	36,446	33,930	33,250	32,561
WORKERS AGED 29 OR YOUNGER										
Employed in the City	29,458	29,144	29,566	30,039	31,318	31,970	31,980	28,478	29,121	29,913
Employed in the City but Living Outside	14,395	14,248	14,807	14,675	15,334	16,994	16,897	15,337	16,687	17,504
Employed and Living in the City	15,063	14,896	14,759	15,364	15,984	14,946	15,083	13,141	12,434	12,409
Living in the City	24,358	24,714	24,937	26,351	27,574	26,028	26,392	22,493	21,624	21,483
Living in the City but Employed Outside	9,295	9,818	10,178	10,987	11,590	11,082	11,309	9,352	9,190	9,074
WORKERS AGED 30 TO 54										
Employed in the City	62,319	62,039	62,460	62,124	63,130	62,504	62,841	64,828	64,428	62,207
Employed in the City but Living Outside	32,094	32,206	32,828	32,958	34,016	35,485	35,653	37,397	38,340	36,142
Employed and Living in the City	30,225	29,833	29,632	29,166	29,114	27,019	27,188	27,431	26,088	26,065
Living in the City	48,010	47,844	48,088	48,370	48,494	46,221	46,713	46,311	44,308	43,657
Living in the City but Employed Outside	17,785	18,011	18,456	19,204	19,380	19,202	19,525	18,880	18,220	17,592
WORKERS AGED 55 OR OLDER										
Employed in the City	13,497	14,343	15,398	16,446	17,691	19,037	20,294	21,413	22,551	23,720
Employed in the City but Living Outside	6,804	7,341	8,049	8,670	9,463	10,675	11,240	11,957	12,947	13,608
Employed and Living in the City	6,693	7,002	7,349	7,776	8,228	8,362	9,054	9,456	9,604	10,112
Living in the City	10,065	10,720	11,270	12,105	12,883	13,366	14,666	15,154	15,444	16,007
Living in the City but Employed Outside	3,372	3,718	3,921	4,329	4,655	5,004	5,612	5,698	5,840	5,895

Source: Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

As indicated in **Table 5**, the strong Health Science and Medical Care industry in the Spokane area anchors the City's economic base, and includes two major hospital systems, as well as a wealth of medical centers and hospital facilities in the Medical District south and east of Downtown Spokane and near North Town Mall north of downtown. The hospital systems in the City include notable general hospitals and medical facilities, such as Providence/Sacred Heart Medical Center, Deaconess Hospital, Providence Holy Family Hospital, Spokane VA Medical Center, St. Luke's Rehabilitation Institute, Shriners Hospital for Children, Valley General Hospital and a number of Group Health Medical Centers. As discussed later in the report, Washington State University (WSU) was approved in April 2015 to add a full medical school, and the University of Washington (UW) continues to offer health care education in partnership with Eastern Washington University (EWU) in its School of Medicine and Dentistry program.

This strong industry sector is expected to evolve and catalyze future growth in supporting industries, such as medical device manufacturing, clean tech, and related advance manufacturing business.⁸ In fact, more workforce training and lab space supporting health care research and pharmaceutical products, given the existing university students population proximity to the medical facilities, will benefit future employment growth in this sector.

Gonzaga University's graduates in the Classes of 2013 and 2014, for instance, reported 1,112 internships in the Spokane area, including 35 students interning at the Providence/Sacred Heart Medical Center/Holy Family Hospital, and 13 others working in Spokane but funded from as far away as the Howard Hughes Medical Institute in Maryland.⁹ Expansion of the Riverpoint Campus for both UW and EWU focuses on the Health Science and Public Health academic disciplines, resulting in graduates who are fully employed in occupational and physical therapy, healthcare management, and dental professions.¹⁰ The integration of a strong university network, robust hospital systems and close proximity of the medical facilities, and the City's collaboration with hospitals and universities in support of medical research and entrepreneurship¹¹ will continue to position the Health Science and Medical sector as one of the stronger economic drivers in the City and in the region.

The presence of several notable universities and colleges results in an educated labor force in the City that further capitalizes on future academic discipline growth and affects potential development for residential housing. While some universities focus on undergraduate and general education programs, others emphasize professional and graduate level training in Law, Health Science and Medical Care, etc. Not only the universities located in the UD, but also the Spokane Falls Community College and the Community Colleges of Spokane, enjoy close collaboration with local agencies, policy makers, and industries through such organizations as the Spokane Area Workforce Development Council, Greater Spokane Incorporated, the City of Spokane and the University District Development Authority.

Spokane Community College, for instance, works closely with the Spokane Area Workforce Development Council to provide disconnected youth in downtown opportunities to obtain a high school diploma and transfer to a university. The UD's Innovation Partnership Zone (IPZ) is a partnership

⁸ ADE interview with Greater Spokane Incorporated, April 6th, 2015

⁹ ADE email correspondence with Gonzaga University, April 14th, 2015

¹⁰ ADE interview with Eastern Washington University, April 8th, 2015

¹¹ ADE interview with Greater Spokane Incorporated, April 6th, 2015

between universities providing research, technology, and training working with local corporations, hospitals, and other universities. Moreover, other incentives to connect education and the City's skilled labor force include non-credit continuing education for teachers and engineers, entrepreneurship training and opportunities exemplified by the McKinstry's Maker's Space for shared working spaces, and student internship opportunities with local industry leaders. As mentioned in the earlier discussion of household income levels, the economic development and workforce partners throughout the County have adopted a comprehensive approach to boost education levels and high quality jobs in the region.

The closely integrated university system, health care system, and adjacency to local businesses and headquarters facilitate a myriad of opportunities for students to begin education through professional training from high school to full-time employment in the City. The City's competitive advantage in retaining university graduates in the local work force lies in the employment opportunities generated through internships within these networks, and the projected growth in specific private sector industries such as Aerospace, Advance Manufacturing and Professional Services and Information Technology. With future incentives to create more entrepreneurship opportunities, availability of specific training programs through new academic disciplines, and access to regional employment centers, the City is positioned to continue to diversify its economy and capture more local residents to work in the City, which, in turn, will increase the demand for more workforce housing as well as residential development in Downtown Spokane.

EMPLOYMENT GROWTH PROJECTIONS

While overall employment growth has been slow since the market downturn in 2008, certain sectors, such as health services, continue to grow more quickly than other industry sectors. Despite having affordable business costs compared to the other cities in the State, the City of Spokane's private sector growth is expected to continue at a steady but slower pace compared to the national level.

REGIONAL CONTEXT

According to the Spokane Regional Transportation Council (SRTC), the County is projected to gain 68,019 of total jobs between the years of 2010 and 2040, from 196,917 jobs to 264,936.¹² While this reflects an average growth of 2,267 jobs per year, the County actually grew by more than 6,000 jobs between mid-year 2014 and June 2015.¹³ This reflects an accelerated recovery coming out of the recession and indicates that current development opportunities are expanding rapidly. The majority of the employment growth in the County is projected to be in the City of Spokane, which captured 59.3 percent of total employment in the County in 2010 and is expected to account for majority of the employment in the County in 2040 as well. The City of Spokane is allotted the highest percentage of projected employment growth by SRTC, at 36.6 percent, or 24,899 employees through 2040. Spokane Valley is projected to see 27 percent employment growth, the second highest area in the County. The employment in Downtown Spokane is expected to grow from 24,262 employees to 28,698 employees between the years of 2010 to 2040, an increase of 4,436 employees over the 30-year period, for a

¹² Spokane Regional Transportation Council (SRTC), *Horizon 2040 Land Use Planning, Appendix B*. SRTC provides slightly different employment figures in different parts of its report. The figures presented in this analysis reflect the industry sector detailed found on page B-16. ADE also uses the LEHD figure of 116,100 for total employment in 2010 in the City of Spokane, which is slightly higher than the 2010 figure used by SRTC of 111,044.

¹³ Grant Forsyth, Avista Corporation, October 20, 2015.

15.4 percent increase.¹⁴ The UD's employment is expected to grow at a similar rate as the Downtown Spokane District, at 16.9 percent between the years of 2010 and 2040. The projected employment level in the UD would be 9,654 in 2040, an increase of 1,637 employees from the 8,017 jobs currently in the district.¹⁵ According to SRTC, the overall number of university employees in the County was 6,544 in 2010, about 40 percent of which were within the UD. The projected number of university employees in the County is expected to increase to 8,094 by 2040, or 24 percent, with a commensurate increase in workers in the UD by that year.¹⁶

A broad overview of the County's specific industry projections also indicates a significant growth in medical, education, and retail, as well as university-related and office-related employment. The non-university related education sector is projected to grow by 40 percent, an increase from 11,480 to 16,017 jobs. The medical sector would also increase significantly, by 28 percent, or 7,602 jobs by 2040, as shown in **Table 7**. Additionally, retail in the downtown/Central Business Districts will increase by 23 percent, adding approximately 1,675 jobs in the Central Business Districts of the County. While the category of CBD Retail in Table 7 includes CBDs in cities throughout the County, the City of Spokane's downtown remains the retail hub of the region and may capture the majority of the job growth in the retail sector.

TABLE 7 COUNTY OF SPOKANE'S SPECIFIC INDUSTRY EMPLOYMENT GROWTH				
	2010	2040	CHANGE	% CHANGE
Industrial	42,948	60,276	17,328	40%
Non CBD Retail	51,314	71,214	19,900	39%
Office	38,766	50,283	11,517	30%
FIRES	11,697	15,607	3,910	33%
Medical	26,902	34,504	7,602	28%
CBD Retail	7,266	8,941	1,675	23%
Education	11,480	16,017	4,537	40%
University	6,544	8,094	1,550	24%
Total	196,917	264,936	60,017	30%

Source: Spokane Regional Transportation Council, U.S. Census, ADE, 2015

Notes: FIRES = Financial, Insurance, Real Estate, Services

Education sector does not include University employment, which is shown separately.

Close examination of the Study Areas indicates that a higher rate of employment growth is projected to occur in the UD than in the Downtown Spokane/Business Improvement District, at 0.62 percent compared to 0.56 percent average compounded annual growth rate. This is slightly lower than the City's overall average annual growth rate of 0.65 percent, with the job base projected to grow from 116,100 to 140,999 between 2010 and 2040, as shown in **Table 8**. The college age cohort is growing rapidly in Spokane, achieving a 37.7 percent increase between 2009 and 2013 (**Table 2** above). As

¹⁴ Spokane Regional Transportation Council, GIS Data at TAZ level, ADE, 2015.

¹⁵ Spokane Regional Transportation Council, GIS Data at TAZ level, ADE, 2015.

¹⁶ Spokane Regional Transportation Council, Horizon 2040 Land Use Planning, ADE, 2015.

student enrollments grow, UD employment, including faculty and staff, is also projected to increase, leading to additional demand for more housing in the UD.

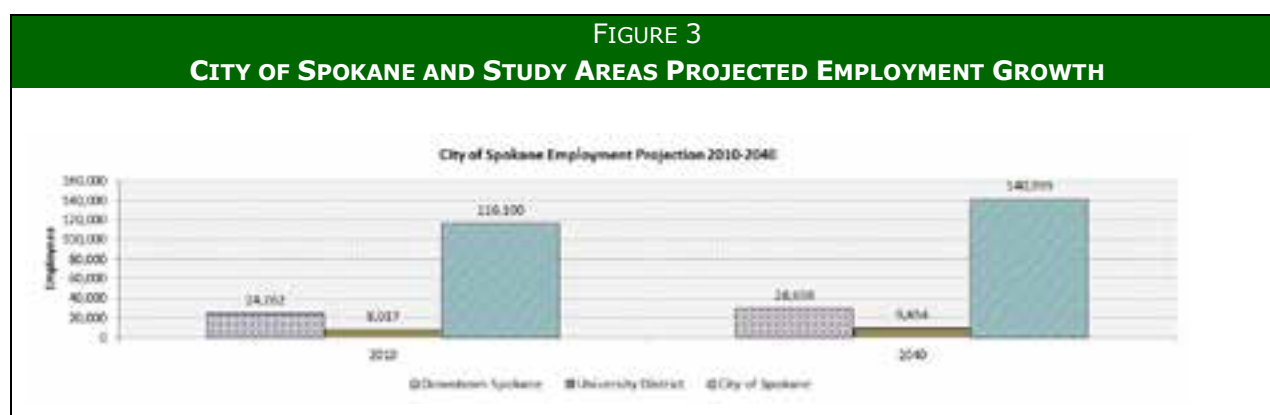
TABLE 8 CITY OF SPOKANE AND STUDY AREAS EMPLOYMENT 2010-2040				
	2010	2040	CHANGE	CAGR* (2010-2040)
Employment				
Downtown Spokane	24,262	28,698	4,436	0.56%
UD	8,017	9,654	1,637	0.62%
City of Spokane	116,100	140,999	24,899	0.65%

Source: Spokane Regional Transportation Council, U.S. Census, LEHD 2010, ADE, 2015.

*CAGR = Compound Annual Growth Rate.

Additionally, the growing employment in the Downtown Spokane/Business Improvement District also suggests the following opportunities:

- 1) As students from the current university population graduate, they will find greater opportunities to work in Downtown Spokane or the UD;
- 2) Downtown Spokane will accommodate additional employment and job opportunities that will translate to additional workforce housing demand, as discussed further in the residential market demand analysis later in the report;
- 3) As jobs and housing increase in the UD and Downtown/Business Improvement District, the amount of retail, commercial and restaurant needs will increase, as discussed in the Retail Market Analysis later in the report. The increase in median household incomes between 2009 and 2013, coupled with the City's incentives to further increase high wage jobs, will further support retail demand (See p. 70 for description of City economic development incentives).



Source: Spokane Regional Transportation Council, U.S. Census, ADE, 2015

UD LABOR FORCE

While the employment projections from the Spokane Regional Transportation Council and supplemental interviews with the Greater Spokane Incorporated and Workforce Development Council

describe the overall City and Study Area's employment potential, analysis of employee characteristics and commute patterns can further illustrate the economic potential of the UD.

ADE uses employment and industry statistics generated by the U.S. Census from LEHD data for the period 2002-2011 (latest available) to describe business and industry types (such as in **Table 5**), and worker in-flow and out-flow commute patterns specifically in the UD. (The numbers obtained from this source are slightly different than the TAZ level data provided by SRTC described above, but the characteristics of the job base and labor force are valuable in considering future market opportunities.) These key drivers of the local economy compare local employment trends by industries specific to the UD relative to the rest of the City and downtown. Coupled with evaluating the number of workers residing and commuting to the UD from the City, the industry and worker characteristics address the availability of the labor force and skillsets available when considering potential locations for employers and businesses in Downtown Spokane based on the adjacent UD labor force composition. This also helps identify the specific training and education needed for the skilled workers in the UD that is directly relevant to the universities' future academic discipline changes, campus facility expansion plans, and future potential for additional university-related worker housing or off-campus housing outside of the UD.

UD EMPLOYEE CHARACTERISTICS

As noted in the previous regional labor force section of the Analysis, the County's combined university/other educational job base is projected to increase by nearly 6,100 jobs by 2040, accounting for a large percentage of job growth in the County. As of 2011, the Educational Service sector accounted for about half of total employment in the district (see **Table B** in the Appendix). Other employment sectors include Health Care and Social Assistance, as well as Accommodation and Food Services, which accounted for approximately nine percent each. While Educational Services has always been a dominating employment sector in this area, it has grown since 2002, from 37.8 percent of total UD jobs to 50.9 percent in 2011. In contrast, the number of employees in Wholesale Trade has decreased steadily throughout the past decade, along with a slight increase in Construction and Manufacturing.¹⁷ The shift in the types of jobs and industry signifies changes in the nature of employment and development of a more sophisticated workforce, away from manufacturing and construction labor.

The UD workforce characteristics vary depending on whether they work in the UD or elsewhere (see **Tables A to E** in the Appendix). As of 2011, the US Census LEHD reported 11,573 jobs in the University District (slightly more than shown in the SRTC model), while there were 796 employed workers living in the UD. Of this latter amount, 55 were working in the UD and 741 were employed elsewhere. Not surprisingly, workers who live in the UD tend to be younger than the overall labor force working in the UD. About one-third of those living in the UD are 29 years or younger, compared to 18 percent for the UD workforce as a whole. About 25 percent of workers living in the UD are in education or health services, and another five percent are in professional, technical or information services. Retail and visitor-serving businesses, including food services, employ another quarter of the UD labor force, with other industries employing less than seven percent each.

¹⁷ Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

EDUCATION AND UNIVERSITIES

INTRODUCTION

The large presence of the universities provides a significant student population that translates into future labor force and employment growth, supported by the existing and future plans of the university academic disciplines. Partnerships with the local and regional business corporations, public agencies and community stakeholders, as well as among the universities, further provide a strong, collaborative network that can help to drive the future economic development of the City. This section of the Analysis provides a general overview of the universities located in the UD and Downtown Spokane, in addition to some located outside the UD that are part of the University campus system. The overview provides a framework for evaluating the future expansion plans for each university, including total student enrollment, faculty and staff growth, existing on-campus and off-campus housing opportunities, and the number of disciplines for undergraduate, graduate, and professional programs in addition to executive education. In addition, collaborative partnerships with other universities and industry leaders that shape each university's specific mission and graduate profile affect the development of the labor force in the region.

UNIVERSITIES IN THE UD

The City of Spokane is home to a number of notable public and private universities concentrated in the UD, plus community colleges and other universities outside the UD. The largest private university occupying land in the City is Gonzaga University, a Roman Catholic university. Other universities and colleges in the City include Eastern Washington University, Washington State University, University of Washington, Whitworth University, Spokane Falls Community College, Spokane Community College, the Institute for Extended Learning, and ITT Tech campus. Whitworth University is located north of the UD, but has an educational center in the UD offering professional programs to primarily adult students. Spokane's three largest school districts include Spokane Public Schools, Central Valley School District, and Mead School District with high schools, middle schools, and elementary schools (see **Figure 4** for the UD within the City context).

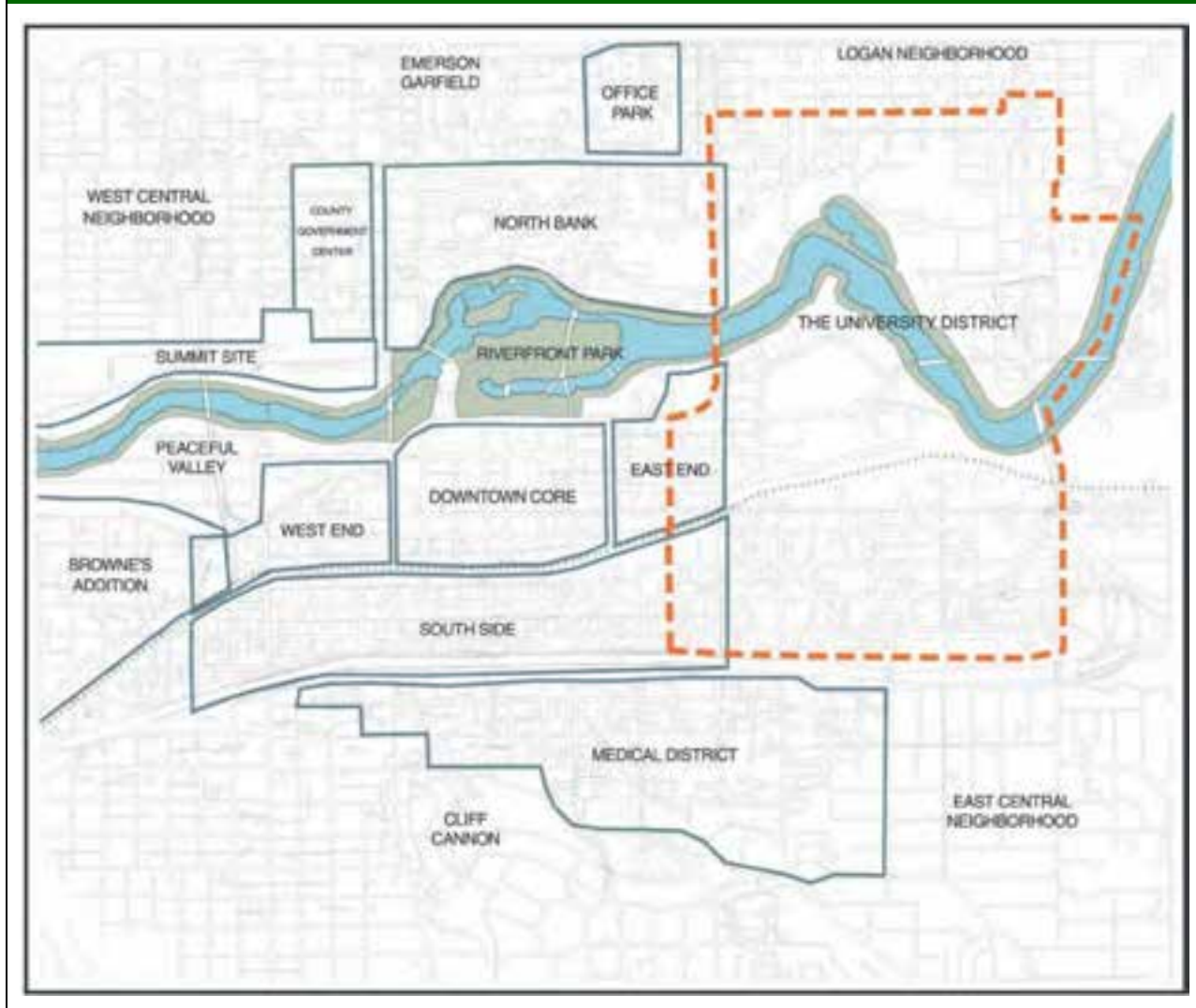
A regional overview in Spokane County shows there were 25,219 university students in 2010 and the total number of university students is expected to increase to 34,090 students in 2040.¹⁸ The majority of the university students in the County are enrolled in the public and private universities in the City of Spokane. Within the City, approximately 17.6 percent of undergraduate students reside in the UD, and 1.8 percent live in Downtown Spokane and the Business Improvement District (see **Appendix 7**). In addition, an estimated 3.9 percent of graduate or professional students live in the UD, and 1.7 percent live in Downtown Spokane (see **Appendix 8**).¹⁹ According to the U.S. Census Bureau in 2011, the total school enrollment in the City was 54,830. Elementary or high school enrollment was 30,548, while undergraduate or graduate school enrollment was 18,798, and the remainder in kindergarten and preschool. An estimated 91.6 percent of people 25 years and over in the City had at least graduated from high school, and 29.2 percent had a bachelor's degree or higher.²⁰

¹⁸ Spokane Regional Transportation Council, Horizon 2040 Land Use Planning, ADE, 2015.

¹⁹ Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

²⁰ U.S. Census 2011; ADE, 2015.

FIGURE 4
CITY OF SPOKANE UD



Source: ADE, City of Spokane

The following sections provide an overview of each university's current and projected enrollment, academic disciplines, staff and professors, housing and dormitories, and future expansion plans based on multiple data sources including in-person interviews, secondary internet sources, university websites, published long-term plan documents, and data and information from university administrators.

GONZAGA UNIVERSITY²¹

University Students: The Roman Catholic private university was founded in 1887 and is located in the heart of the UD in Spokane and occupies the majority of the land in the UD. Gonzaga includes a Law School in the district. The University supports a total of 7,486 students and 1,540 faculty and staff. The student population includes 5,046 undergraduate students, 1,903 graduate students, 198 doctoral students, and 339 professional students as of fall 2015. Approximately 48 percent of students are from the State of Washington and 8 percent from Oregon, while 23

²¹ ADE Phone interview and email correspondence with Gonzaga University, Mary Joan Hahn, Director, Community and Public relations, Marty Martin, Executive Vice President, and Chuck Murphy, Vice President for Finance; University website; ADE, 2015.

percent of students come from California, Montana, and Idaho. There are 724 faculty members and 825 non faculty staff on campus.

Academic Programs – Undergraduate: The University offers 43 undergraduate degree programs, and has a majority of the students in the undergraduate program in five separate schools including: College of Arts and Sciences (2,284); School of Business (1,104); School of Education (182); School of Engineering and Applied Sciences (952); and School of Nursing and Human Physiology (524).

Academic Programs – Graduates, Doctoral, and Professional: There are a total of seven different schools at the graduate level and 26 master's degree programs, which comprises the second largest student population at the University. This includes: College of Arts and Sciences (41); English Language Center (31); School of Business (172); School of Education (380); School of Engineering and Applied Science (47); School of Nursing and Human Physiology (624); and School of Professional Studies (608). With only two schools offering doctoral programs, the School of Nursing and Human Physiology has 120 students and the School of Professional Studies has 78 students. The School of Law, which is the only professional school at the University, has 339 law students.

Faculty and Staff: Gonzaga University has a total of 1,549 faculty and staff which include 724 faculty and 825 non-faculty staff.

Housing Demand: Nearly 40 percent of the student population lives on the University campus, while 99 percent of faculty and employees live off-campus. An estimated 2,825 of University students live on campus, and 144 students live off-campus at the University owned off-campus housing. Both freshmen and sophomores are required to live on campus. In addition, an estimated 1,534 faculty and staff live off campus, while only 18, or one percent of total faculty and staff live on campus. Approximately half of off-campus students live within 5 miles of campus, including the Logan Neighborhood. Graduate students usually live off-campus in privately owned housing units.

Future Plan for the University: In 2015, the University added 167,000 sq. ft. to the University Center. It is planning to complete a Science building expansion of 72,000 sq. ft. and a 750-seat Performance Arts Building of 53,000 sq. ft. in 2016, as well as other smaller projects around the district. The University plans to increase the number of online programs to alleviate demand of on campus enrollment, while also responding to demand in STEM (Science, Technology, Engineering, Math) and accommodating more future demand for the Arts program. The future Central City Bus Line will connect the campus directly to Downtown Spokane, which will attract more students to travel to the downtown area.

EASTERN WASHINGTON UNIVERSITY²²

University Students: Eastern Washington University is a public university founded in 1882 located 15 miles southwest of Spokane in Cheney, and is a regional university that had a total enrollment of 13,453 students in the academic year of 2014/2015, including 9,557 undergraduate students and 1,227 graduate students. The remainder are taking online courses or other non-degree related course work. These figures have remained stable for the Fall 2015 term. The University's Spokane Campus serves as the City's center for advanced graduate and professional studies and research on health science. Approximately 2,200 to 2,500 students occupy the Spokane campus, depending on the term. Recent data indicate that 1,803 students are part-time undergraduate, 862 students are full-time graduate students, and 365 are part-time graduate students.

²² ADE in person interview with Eastern Washington University; University website; ADE, 2015.

Faculty and Staff: The University has 474 full-time faculty, and 222 part-time faculty, 889 full time and 114 part time non-teaching staff. About 200 of these faculty/staff work at the Spokane campus.

Academic Programs – Undergraduate: Five separate schools enroll undergraduate students, including: College of Arts, Letters and Education; College of Business and Public Administration; College of Health Science and Public Health; College of Science, Technology, Engineering and Mathematics; and College of Social and Behavioral Sciences and Social Work. The Spokane campus focuses on the health science, education, and criminal justice disciplines.

Academic Programs – Graduates, Doctoral, and Professional: The University's graduate programs include Applied Psychology, Biology, Business, Communication, Computer Science, Creative Writing, Dental, Education, Teaching, English, History, Music, Occupational Therapy, Physical Education, Physical Therapy, Psychology, Public Administration and Health, Social Work, and Urban and Regional Planning. The University also offers expanded learning programs for non-credit professionals in project management, business education, career and technical education, education, and therapeutic recreation, as well as housing the Sleep and Performance Research Center.

Housing Demand: EW's resident campus is in Cheney, where nearly 100 percent of freshmen live in University housing. However, the majority of the University students (82%) and faculty live in off-campus housing, and the University does not expect to build any more student or faculty housing due to the growth strategy being focused on the Spokane Campus in the near future.

Future Plans for the University: EWU is preparing a new strategic plan; therefore, specific information about expansion plans is not currently available. However, the University is interested in consolidating its Spokane programs and strengthening the partnership with University of Washington to expand the Dental "RIDE" program and with Washington State University Nursing Program to possibly open a new clinic while working closely with a local hospital. The Spokane campus primarily houses Health Science and Public Health disciplines. There is currently no plan to build housing to accommodate students and faculty since the majority of the student population commutes into Spokane.

WASHINGTON STATE UNIVERSITY IN SPOKANE²³

University Students: Established in 1890 as a land grant university, Washington State (WSU) is a public University that has four campuses including the Spokane Campus located in the east end of Downtown Spokane in the UD. The Spokane Campus was established in 1989 and WSU also shares some of the programs with Eastern Washington University. The University had 1,482 total students enrolled in the 2015/2016 academic year, up from 1,458 in 2014-15. The University had 615 undergraduate students, and 372 graduate students.

The most recent projections for student growth at the WSU Spokane campus indicate that another 251 students could be added by 2023; however, the University expects to revise this figure as planning for the new medical school is developed.²⁴

Faculty and Staff: There are 200 full-time faculty, and 200 staff members.

Academic Programs – Undergraduate: WSU offers undergraduate in Nursing, Speech & Hearing and Nutrition and Exercise Physiology.

²³ Washington State University website; Phone interview and email correspondence with Judy Zeiger, Director of Student Affairs; ADE, August 2015.

²⁴ Letter from Lisa J, Brown, Ph.D., Chancellor, to Mark Richard, President, University District Development Association, dated November 5, 2013.

Academic Programs – Graduates, Doctoral, and Professional: The University offers graduate degrees in the same programs as the undergraduate level, but also offers graduate programs in Health Policy and Administration, Criminal Justice and Education. The University offers a professional degree program in Pharmacy, with 495 students (Fall 2015).

Housing Demand: The WSU students are not provided with campus housing on the Spokane Campus, and typically seek off-campus housing or one-bedroom apartment housing within 5 miles of the campus. Rent ranges from \$350 to \$600 per month as of Spring 2015.

Future Plans for the University: The University has just been approved to add a medical school, which will serve as a significant catalyst for a range of both public and private development opportunities. A recent study estimates that the annual economic impact of the Spokane campus will increase from \$346.7 million in 2013 to \$908.9 million in 2023 based on current University expansion plans.²⁵ Future expansion plans include increasing the campus footprint by as much as 490,700 sq. ft. by 2024, with additional long-term expansions included in the recently updated Master Plan.

UNIVERSITY OF WASHINGTON – SCHOOL OF MEDICINE²⁶

University Students: University of Washington is a large public University founded in 1861 and based in Seattle. There are three programs at the Spokane campus, including the School of Medicine, Physician Assistants, and Dentistry. The majority of the University of Washington students at Spokane are medical students who participate in academic programs provided in partnership with EWU. As of Fall 2015 in Spokane, there are an estimated 40 Physician Assistants students in their first two years of studies, 80 medical students in a two year program, 30 medical students completing their required 3rd and 4th year rotations with an additional 40 FTE students completing other required clerkships, and eight dentistry students.

Faculty and Staff: The University's faculty and staff are from the City's hospital network and other University medical programs. There are 16 to 18 medical school faculty and one faculty in the school of dentistry, with the remaining faculty shared with Eastern Washington University.

Academic Programs – Graduate, Doctoral, and Professional: The University has first and second year medical students from the School of Medicine and Dentistry, and first year dental students at the Spokane Campus in partnership with WSU and EWU as part of the WWAMI (Washington, Wyoming, Alaska, Montana, and Idaho) Regional Medical Education Program and the RIDE dental program.

Future Plans for the University: The University plans to increase its medical school student class size to 120 students, and dentistry students to 32 students per year. The State Legislature has funded the medical school expansion along with the development of a new medical school under the auspices of WSU, described above. Future UW plans include continued collaboration and partnership with Eastern Washington University and Gonzaga University to develop new health care related instructional programs. The University is seeking capital improvement funding for a new building for the school of dentistry.

WHITWORTH UNIVERSITY²⁷

University Students: A private Christian liberal arts college founded in 1890 and located in the City of Spokane, the University is in partnership with the Spokane Falls Community College and Spokane Community College. With a

²⁵ Tripp Umbach, *America's Next Great Health Sciences Campus, 2013 Economic Impact Study Update*, July 2013.

²⁶ University of Washington website; Phone interview with Suzanne Allen, Vice Dean for Academic, Rural, and Regional Affairs of UW, ADE, May 2015.

²⁷ ADE Interview with Whitworth University; University website; ADE, 2015.

separate main campus in northern Spokane, the university's downtown campus focuses on adult learners and occupies space in the Riverfront office park with seven classrooms and four offices. As of Fall 2015, it has 2,666 undergraduate and 325 graduate students on the main University campus and approximately 150 undergraduate and 50 graduate students in the Downtown Spokane campus.

Faculty and Staff: There are 156 full-time faculty at Whitworth University teaching both undergraduate and graduate courses.

Academic Programs – Undergraduate: The University has four colleges and 60 undergraduate and graduate degree programs. The undergraduate programs are in the College of Arts and Science, the School of Business, the School of Education, and the School of Continuing Studies.

Academic Programs – Graduates, Doctoral, and Professional: The graduate studies programs include counseling and therapy, education, teaching, theology, and an MBA program. The University also has adult education programs including organizational management, management and accounting, teaching, social services, criminal justice, public administration, and humanities.

Housing Demand: Housing is not a need for the Whitworth UD center due to the older age demographic of its students and the professional nature of the educational programs it offers.

Future Plans for the University: The University is not expected to grow at the main campus; in fact, they expect to limit total enrollment to 2,300 in the future and grow the non-traditional student enrollment at the downtown campus. The downtown campus is expected to continue to offer adult learning continuing study, with degree and non-degree programs, in addition to six undergraduate and MBA programs. The University expects to add new executive MBA programs for doctors in the future, and to continue executive training in partnership with local hospitals such as Sacred Heart Hospital. The University's 2021 Strategic Plan will continue to have a five percent student growth rate for the adult learning program, which is self-supporting, and hopes to eventually have more facilities in downtown close to local businesses. However, parking is an issue downtown for the campus that needs to be addressed.

OTHER EDUCATIONAL INSTITUTIONS

Spokane also offers several community colleges, extended learning, and apprenticeship educational opportunities within the City. The Community Colleges has 29,766 full and part time undergraduate students as of Fall 2015, and employ 1,453 faculty and staff. The Institute for Extended Learning, which coordinates rural outreach for business and community training, as well as adult literacy services, serves approximately 38,600 students annually and works closely with the universities in the UD as well as the local Spokane Area Workforce Development Council to provide education and working opportunities for local residents. The Community Colleges and other Schools include: ²⁸

- Spokane Community College
- Spokane Falls Community College
- Institute for Extended Learning
- ITT Technical Institute
- Spokane Art School
- Washington School of World Studies
- Moody Bible Institute

²⁸ ADE Interview with Spokane Area Workforce Development Council; EWU; Community College website; ADE, 2015.

TOURISM AND ATTRACTIONS

OVERVIEW

The City's rich cultural heritage is exemplified by the downtown Davenport Hotel, the art deco Fox Theater, the Steam Plant adaptive reuse for new restaurants and offices, as well as amenities such as the 100-acre Riverfront Park, the adjacent new Spokane Tribal Gathering Place, the Spokane Falls Skyride Gondola ride, INB Performing Arts Center, and the River Park Square retail complex. The City of Spokane is home to a variety of events, accommodating local residents and regional visitors to enjoy the downtown urban experience and regional festivals. ADE collaborated with Steinberg Architects to evaluate the local amenities and attractions, including local shopping, dining, cafes and bakeries, pubs and lounges, wineries, museums and attractions, as indicated in **Figure 5**. The map also indicates the location of the Davenport Art District and the historic districts around downtown.

VISITORS PROFILES

An estimated 69 percent of the leisure travelers in Spokane come from a 250-mile radius around the City. Visit Spokane, a regional tourism bureau, noted that the City has approximately three million visitors each year, generating approximately \$977 million in annual visitor spending in recent years. In 2013, there were an estimated 572,000 overnight guests in the downtown area occupying 351,839 rooms, compared to 3.3 million visitor-stays in the County. Spokane gained an estimated \$139 million that year in visitor spending from these Downtown tourists, or about 14 percent of the total visitor spending in the City. Of the total visitor spending, the City generated approximately \$276 million, or 29 percent, in revenue from over 155 events and festivals in 2014. In 2015, 133 events had already been scheduled and booked by spring, with expected revenue of \$272 million.²⁹

REGIONAL FESTIVALS

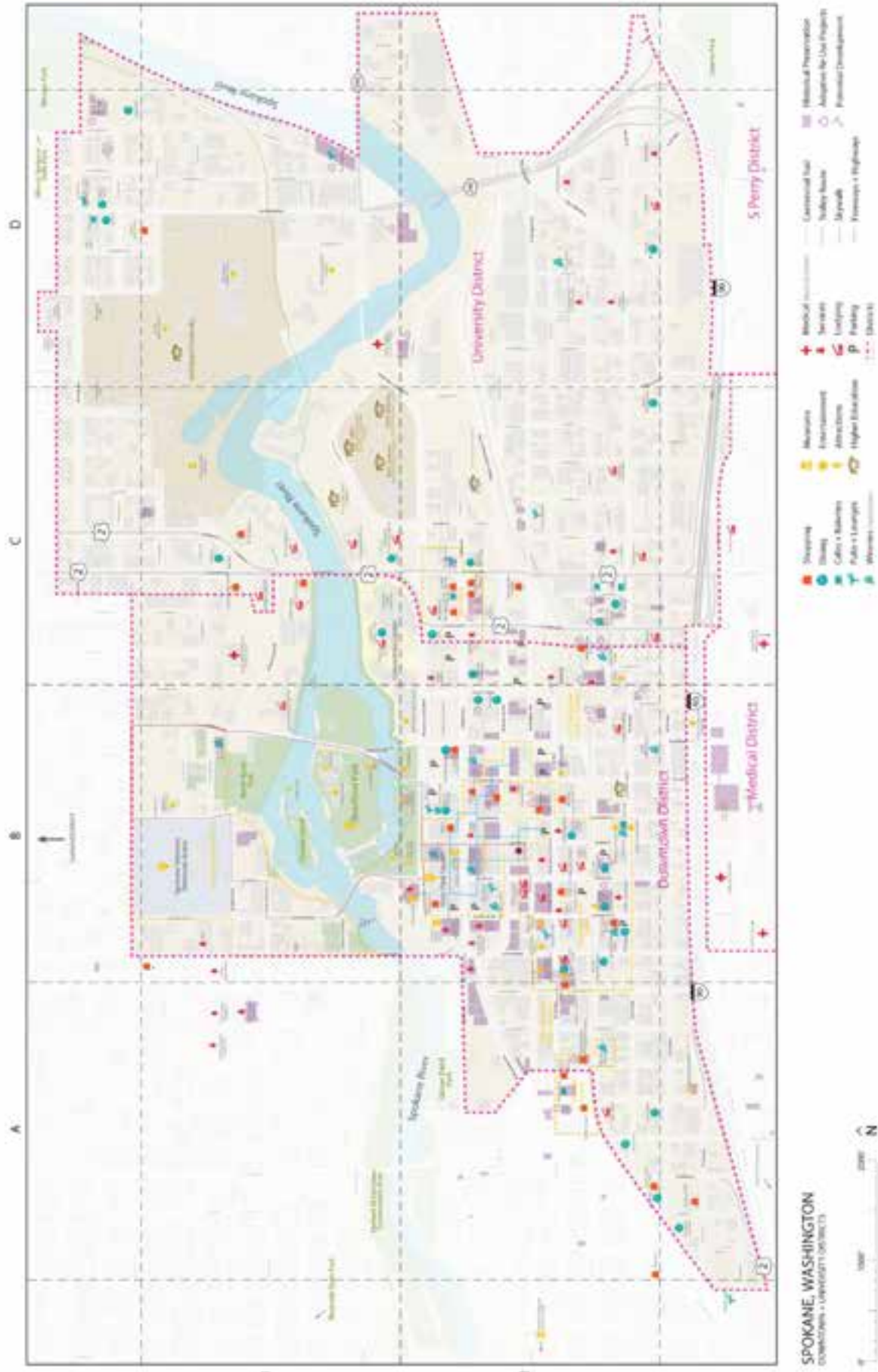
The City's notable natural landscapes and beautiful natural attractions are located close to the Riverfront Park. The proposed Riverfront Park renovation, Huntington Park, the Spokane River, Manito Park, and the Centennial Trail providing miles of trails for bicycling and jogging, as well as the abundance of golf courses and lakes serve local residents and visitors alike who enjoy outdoor recreational amenities. During the winter, Spokane features skiing opportunities as well as an outdoor ice skating rink and Riverfront Park. The City is most famous for the annual regional festivals, along with local farmers markets, some of which include the following:³⁰

- **Bloomsday** – one of the largest running races in the nation, a 7.5 mile race through the City attracting over 50,000 runners and walkers from around the world in early May, and serves as the official kickoff event to the City's Lilac Festival, which attracts 160,000 participants.
- **Lilac Festival** - ten days of activities of celebration in May featuring the Armed Forces Torchlight Parade, where members of the armed forces and high school marching bands march in downtown, with parade floats along the city streets.
- **Hoopfest** - the largest 3-on-3 street basketball tournament in the world, featuring more than 7,000 teams on more than 450 courts every June, with over 250,000 spectators and players.
- **Pig Out at the Park** – an annual festival featuring local restaurants at the Riverfront Park for Labor Day weekend, a five-day event with over 45 food booths and outdoor entertainments.

²⁹ ADE interview with Visit Spokane, April 7th 2015, ADE.

³⁰ ADE interview with Visit Spokane, April 7th 2015; www.visitspokane.com; ADE 2015.

FIGURE 5
LOCAL AMENITIES AND ATTRACTIONS IN DOWNTOWN AND UD



- **First Night Spokane** – New Year’s Eve Winter Festival that includes family friendly events and performances.
- **Art Fest** – local arts and crafts as well as food vendors and musicians are showcased in the City’s historic Browne’s Addition neighborhood, typically in late May and early June.
- **July 4th firework show** – hosted annually in Downtown Spokane’s Riverfront Park.
- **Oktoberfest** – featuring live music and German food.
- **Lantern Festival** – a brand new festival at the Riverfront Park with dozens of larger than life size authentic Chinese lanterns, music and food, it was first held in September 2015.
- **Fiesta Spokane** – a festival in September celebrating Hispanic Heritage Month via a 5k/10k fun run, festival in the park, and an Encanto Gala.
- **Spokane International Film Festival** – celebrates independent films from around the world during ten days in February, hosted at several theaters in the City.
- **Green Bluff** – a showcase of community and family farms, fruits and vegetables, and wineries from the local region. This is located outside of Spokane, but reflects the diversity of family attractions throughout Spokane County.

RIVERFRONT PARK

Originally the home to the 1974 Exposition, the significance today of the Riverfront Park in Spokane, with 2.5-3 million annual domestic and international visitors, is exemplified by its hosting of major annual events, including Bloomsday, Hoopfest, 4th of July, and Pig Out at the Park. Approximately 600,000 of the visitors are active users, visiting the amusement center, the gondola and other recreation and entertainment facilities as well as the events, while the remaining are passive users, enjoying the trails and open space. The park is planned to have a \$64 million upgrade to be completed by 2019, that includes relocating the amusement rides and the ice-skating rink closer to the Riverfront Park Mall. The carousel in the park is currently one of the oldest in the nation, built in 1909, and is expected to stay as a signature piece at the park. The improvements will include improving the bridges and pathways throughout the park, and expanding the events venue at the waterfront. Other amenities may include concessions, parking, skyrides, and the relocated ice-skating rink. The recent hotel construction and convention center expansion along the riverfront will help to accommodate lodging needs during these large events, especially Hoopfest, where visitors have had to reserve a room many months ahead of the event due to large demand.³¹

ARTS

The City’s local arts and music scene includes the Spokane Symphony and various live theaters that feature local musicians and actors, along with artist studios, galleries, and public arts on downtown building facades. The Arts Galleries are located in the heart of downtown as well as at Whitworth University and City Hall. The City’s growing art scene includes exhibits, festivals, as well as public arts, exemplified by the following: ³²

³¹ ADE interview with Spokane Parks and Recreation Department, April 7th 2015, ADE.

³² ADE interview with Visit Spokane, April 7th 2015; www.visitspokane.com; ADE 2015.

- **First Friday (of every month)** - an event sponsored by the Downtown Spokane Partnership, Business Improvement District, and Spokane Arts, featuring events and exhibits by local artists and musicians in the downtown area. Visitors are provided a map that highlights local destinations.
- **Sculptural Walk** – a public art installation along the Spokane River between the Monroe Street Bridge and the UD.
- **Public Art** –seven new murals were funded by the City’s Art Fund on the City’s buildings in the downtown area between January 2014 and October 2015. The mural program has operated since 1983.
- **Art Galleries and Museums** – the City hosts several significant museums and galleries, including the Northwest Museum of Arts and Culture (MAC), Jundt Art Museum at Gonzaga University, Bryan Oliver Gallery at Whitworth University, EWU Gallery of Art, Spokane Falls Community College Fine Art Gallery, Chase Gallery at City Hall, and 12 other studios and local galleries in downtown.

According to Visit Spokane, the 2013 to 2014 Creative Vitality Index showed Spokane County, with 6,969 creative jobs, to be on par with the national average for “creative occupations” (0.963 on a scale of 0.0 to 1.0). The high arts profile in the County positions the City to attract further arts and cultural activity in the region.³³

MUSIC AND OTHER CULTURAL ENTERTAINMENT

The downtown also has a variety of music, sports and other entertainment venues, including the Spokane Symphony, local live theaters such as the Bartlett Concert Hall and the Knitting Factory, a large concert venue with a restaurant. Several of the more significant venues include the following: ³⁴

- **Spokane Symphony** – the largest and most active performing arts organization featuring a 70-piece professional orchestra performs more than 60 concerts including classical, pops, chamber orchestra, ballet, and family and holiday concerts. The symphony draws over 150,000 visitors annually.
- **West Coast Entertainment** – a national promoter presenting Broadway touring productions and events.
- **Martin Woldson Theater at the Fox** – home of the Spokane Symphony and a variety of performances.
- **The Bartlett** – state-of-the-art concert hall featuring unique and up-and-coming tours, with weekly art events such as open mic and poetry slam.

³³ ADE interview with Visit Spokane, April 7th 2015; ADE 2015. Note: the Creative Vitality Index is a ratio, indicating that Spokane has 96.3 percent as many creative occupations per total jobs as the nation as a whole.

³⁴ ADE interview with Visit Spokane, April 7th 2015; www.visitspokane.com; <http://www.inlander.com/spokane/not-too-big-not-too-small>; ADE 2015.

- **The Bing Theater** – Performing Arts Theater and part-time movie theater that seats up to 750 people.

To accommodate the arts and music scenes, the City has several notable venues that are multipurpose and accommodate large performance groups and concerts, which include the Spokane Arena, a 12,500-seat, state-of-the-art multipurpose arena, and the INB Performing Arts Center, which is along the downtown riverfront adjacent to the multi-purpose 200,000 sq. ft. Downtown Spokane Convention Center and exhibit hall, and hosts a variety of entertainment events including comedians and Broadway shows.

In addition, Spokane hosts a number of professional sports teams such as the Chiefs (hockey), the Indians (baseball) and the Shock (arena football).

RESTAURANTS AND RETAIL

The City's culinary scene has evolved significantly in recent years, and has an up-and-coming restaurant scene with over 500 restaurants, which comprises approximately 62 percent of the total restaurants in the County. There are over 120 food and coffee venues that serve food in the Downtown area alone. One of the City's restaurants, Sante's, was a semifinalist in 2015 for the James Beard award, which marked a turning point for the culinary scene in the region. Many of the restaurants focus on dishes made with local ingredients, as exemplified by the City's Restaurant Week, which featured 97 local restaurants in 2014.³⁵

The City has designated several cultural culinary related tours and districts that highlight the various cultural aspects of the City, including the Cork District and the Ale Trail, in addition to multiple restaurants highlighted in the Restaurant Week in the downtown area. The Cork District, which spans Northern Spokane, the Spokane Valley, and downtown, has a large number of wineries and wine tasting venues featured in the downtown area. The Ale Trail, started in 2013, expanded from 17 to 27 brewery participants by 2015. There are also multiple cooking classes and kitchen stores in the City that cater to the up-and-coming culinary scene in the City.³⁶

The culinary scene is further marked by the adaptive reuse of buildings that include new restaurants in a former industrial Steam Plant. The historical building, built in 1916 with large smoke stacks, is architecturally significant and has been converted wonderfully to accommodate restaurant and office spaces.

The County of Spokane is home to several retail shopping centers, including River Park Square, North Town Mall, and Spokane Valley Mall, which also contribute to the visitor experience. River Park Square includes Nordstrom, Apple Store, Anthropologie, and an upcoming Urban Outfitters. It is located in the heart of Downtown Spokane adjacent to the Monroe Street Bridge. The retail complex includes a Children's Museum, movie theater, wine cellars and tasting rooms and restaurants.³⁷ Further detailed retail analysis is shown in the Retail Market Analysis section of this report.

³⁵ ADE interview with Visit Spokane, April 7th 2015; ADE 2015. Restaurant Week is held in February and participating restaurants offer a range of menu items at discount prices.

³⁶ ADE interview with Visit Spokane, April 7th 2015; www.visitspokane.com; ADE 2015.

³⁷ Visit Spokane Map; ADE interview with Visit Spokane, April 7th 2015, ADE.

CONCLUSION

The wealth of local festivals, events, and amenities shows the City's strength in cultural resources, famous regional festivals, and recreation activities, which will continue to grow with the public and private sector investments underway and planned. In addition to the Riverfront Park renovation, the \$55 million, 91,000 sq. ft. Spokane Convention Center expansion was completed in 2014, and the 716-room Davenport Grand Hotel opened in June 2015.³⁸

Furthermore, the new up-and-coming, award-winning restaurant scene will attract demographic groups that value culture and culinary entertainment, and urban living and experience in the downtown area. With the renovation of the Huntington Park open space, and the upcoming renovation of the Riverfront Park — a City funded capital improvement project expected to cost an estimated \$64 million³⁹ — this will further catalyze the City's tourism attractions and capitalize on the City's natural landscape and the existing parks popularized by local events and festivals.

Overall, the wealth of amenities and attractions have a number of positive effects on the local economy:

- Tourist destination and convention facilities near the waterfront will accommodate additional business and leisure travelers to the downtown and Business Improvement District.
- The increase in tourist attractions such as the food and beer trails, conversion of industrial warehouses to restaurants such as the Steam Plant, "Pig out at the Park" and "Chinese Lantern Festival" in addition to Bloomsday and other local festivals will attract regional residents and visitors to stay in Downtown Spokane and subsequently increase retail and hotel spending.

³⁸ ADE interview with Visit Spokane, April 7th 2015, ADE.

³⁹ ADE interview with Spokane Parks and Recreation Department, April 7th 2015, ADE.

RESIDENTIAL MARKET ANALYSIS

INTRODUCTION

The residential market assessment provides an overview of housing trends occurring regionally and locally in the Study Areas. Following a review of housing permit trends and other real estate residential market performance indicators, this section assesses the potential future demand for specific types of residential housing in the UD and the downtown/Business Improvement District. A number of factors suggest a strong likelihood for increased demand for additional residential housing, including the shifting demographic composition toward both college age and retiree groups evaluated in the Socio-Economic section of the Analysis, the increase in employment in specific industry sectors described in the previous Employment and Labor Section, as well as the housing projection from the Spokane Regional Transportation Council. Considering the demographics of the market and the urban character of the UD and Downtown, the residential market assessment is focused on higher density multifamily housing.

ADE compared multiple data sources to compile the analysis of residential market dynamics and potential, including interviews with real estate brokers and stakeholder groups. The analysis also uses several secondary real estate data sources and reporting published by the Spokane Association of Realtors (SAR), REIS Analytics, Real Capital Analytics, LoopNet, Urban Land Institute, Harvard Joint Center for Housing, and brokerage reports, in addition to government sources including the City of Spokane, Spokane Regional Transportation Council, the U.S. Census, and other available data sources.

RESIDENTIAL MARKET ANALYSIS METHODOLOGY

National, regional, and local economic conditions affect residential property demands, ranging from macroeconomic conditions that shape consumer confidence and business investment activities, such as interest rates, inflation, and industry productivity, to local microeconomic conditions in the Spokane region and the City, such as population dynamics and employment growth. Local tourism and business travel also contribute to future residential demand. The City's changing demographic and market dynamic, coupled with a strong labor force and employment sectors, and a significant student population in the UD, is expected to simultaneously shape the future residential market demand and affect university housing capacity as the local economy continues to grow.

Socio-economic characteristics such as population growth in specific age groups, household formation, mobility, immigration, and income shifts are critical in determining the residential market potential for most housing products, with the exception of senior housing and second homes. These types of characteristics help determine the specific product types that will be effectively absorbed in the market, which then determines potential residential market prices in a given real estate market cycle.

RESIDENTIAL MARKET ASSESSMENT

The strength of the existing economy, labor force, and local tourist attractions in the City serve as the foundation for which demand for the residential properties in the Study Areas and the City can capitalize on, including:

- Additional off-campus university related housing is needed to accommodate future university student and staff populations, in addition to university-related workers, and other workers in the UD.
- The growth in the medical and healthcare industry capitalizes on the university's expansion of medical programs, and the increasing student population and local medical residents.
- The increase in employment in the downtown and the Business Improvement District, in addition to the housing unit projections of need and real estate market demand, indicates a healthy residential market for the downtown area. The new proposed Central City Bus Line connecting the UD to downtown will allow convenient access for local residents and the university student population to Downtown Spokane and support the increased demand for residential housing in downtown.

Recent capital improvement investments along the downtown waterfront, including a new hotel and upgraded conference center, an urban park adjacent to City Hall, and a number of retail stores in downtown, enhance opportunities for future development to support residents and workers attracted to live and work in downtown, in addition to visitors traveling from around the region to enjoy the City's amenities and participate in the local festivals.

CURRENT HOUSING STOCK

As shown in **Table 9**, single family detached homes constitute about two-thirds of the housing stock in Spokane County and in the City of Spokane as well. However, since 1970, growth in multi-family housing has been more rapid than single family, growing from about 25 percent of the housing stock in 1970 to one-third by 2009.

This trend has accelerated in recent years, as permits for multi-family units have run at about 42 percent of new units in the County between 2010 and mid-year 2015 (**Table 10**). For the City, multi-family units have been 55 percent of total new construction during this period (**Table 11**).

TABLE 9 TOTAL HOUSING STOCK BY TYPE OF UNIT SPOKANE COUNTY — TOTAL OF ALL JURISDICTIONS						
	2009		2000a		1970b	
TYPE OF UNIT	NUMBER OF UNITS	PERCENT OF TOTAL	NUMBER OF UNITS	PERCENT OF TOTAL	NUMBER OF UNITS	PERCENT OF TOTAL
Single-Family	133,917	67.5	120,520	69.0	77,074	77.6
Duplex	7,010	3.5	6,351	3.6	4,611	4.6
3 – 4 Unit Bldgs	6,675	3.4	6,099	3.5	2,846	2.9

5 + Unit Bldgs	36,470	18.4	29,749	17.0	12,420	12.5
Mobile Homes	14,409	7.2	12,095	6.9	2,488	2.5
Total	198,481	100.0	174,814	100.0	99,439	100.0
2010 Census	201,434	100.0				
SPOKANE CITY						
Single-Family	62,958	66.8	60,005	68.1	48,646	75.6
Duplex	4,231	4.5	3,913	4.4	2,780	4.3
3 – 4 Unit Bldgs	4,369	4.6	4,245	4.8	2,378	3.7
5 + Unit Bldgs	21,096	22.4	18,360	20.9	10,215	15.9
Mobile Homes	1,579	1.7	1,563	1.8	302	0.5
Total	94,233	100.0	88,086	100.0	64,341	100.0
2010 Census	94,291	100.0				

a 2000 Census

b 1970 Census

TECHNICAL NOTE: For non-census years, these figures are the official estimates of the State OFM Office, except for duplex, 3 – 4 unit structures, and 5 or more unit structures, which are estimated breakouts from the State's "multi-family" estimate. These figures do not include 191 units classified by the 2000 Census as "Boat, RV, Van, Etc."

Source: Spokane City Community Development Department (Dale Strom 509-625-6325) Washington State OFM (Tom Kimpel 360-902-0596)

TABLE 10					
RESIDENTIAL BUILDING PERMITS, SPOKANE COUNTY^a (NUMBER OF UNITS)					
YEAR	TOTAL DWELLING UNITS	SINGLE FAMILY UNITS	DUPLEX UNITS	UNITS IN 3 – 4 UNIT STRUCTURES	UNITS IN 5+ UNIT STRUCTURES
2010	1,487	891	62	0	534
2011	1,632	767	50	0	815
2012	1,145	858	56	7	224
2013	1,998	1,181	60	11	746
2014	1,785	995	90	10	690
2015b	478	230	46	11	191
Total	8,525	4,922	364	39	3,200

a Data represents City of Spokane, City of Spokane Valley, Liberty Lake and unincorporated areas of the County only, and excludes mobile homes.

b Through March 31, 2015

Sources: Liberty Lake Planning and CD department (Michele Frachiseur 509-755-6700); Spokane County Building Department (Jeff Forry 509-477-7103); Spokane City Building Department (Lori Patrick 509-625-6016); Spokane Valley Building Department (Deanna Griffeth 509-720-5301)

TABLE 11					
PERMITS ISSUED FOR RESIDENCES, CITY OF SPOKANE					
YEAR	TOTAL UNITS	SINGLE FAMILY RESIDENCES (DETACHED SFR's)	TOWNHOUSES/ ATTACHED SFR's	DUPLEX UNITS	APARTMENT UNITS
2010	215	164	31	6	14
2011	629	155	21	20	433
2012	383	186	21	16	160
2013	461	250	69	24	118
2014	519	212	11	8	288
2015b	56	40	6	4	6
Total	2,260	1,004	159	78	1,019

b Data pulled from yearly BPAS reports through Feb 2015.

Source: City of Spokane

RESIDENTIAL INVENTORY BY OWNERSHIP

According to SRTC and the U.S. Census, the City had an estimated total of 94,393 single-family and multifamily housing units in 2013, which accounted for both renter and owner occupied units. The majority of the City's housing is owner occupied, with approximately 52.2 percent compared to 39.7 percent renter occupied. Further evaluation of the residential supply in the three Study Areas, which include the UD, Business Improvement District, and Downtown Spokane, shows the Study Areas accounted for approximately 6.9 percent of total housing inventory in the City according to the U.S. Census. In contrast to the city pattern, the majority of the residential units in the study areas are renter-occupied, comprising 81.4 percent of the Downtown housing stock and 69.3 percent of the UD housing inventory. In the Study Areas, there were an estimated 274 owner-occupied housing units and 3,063 residential for-rent units. Detailed information of the existing housing supply as of 2013 is shown at **Table 12** below.

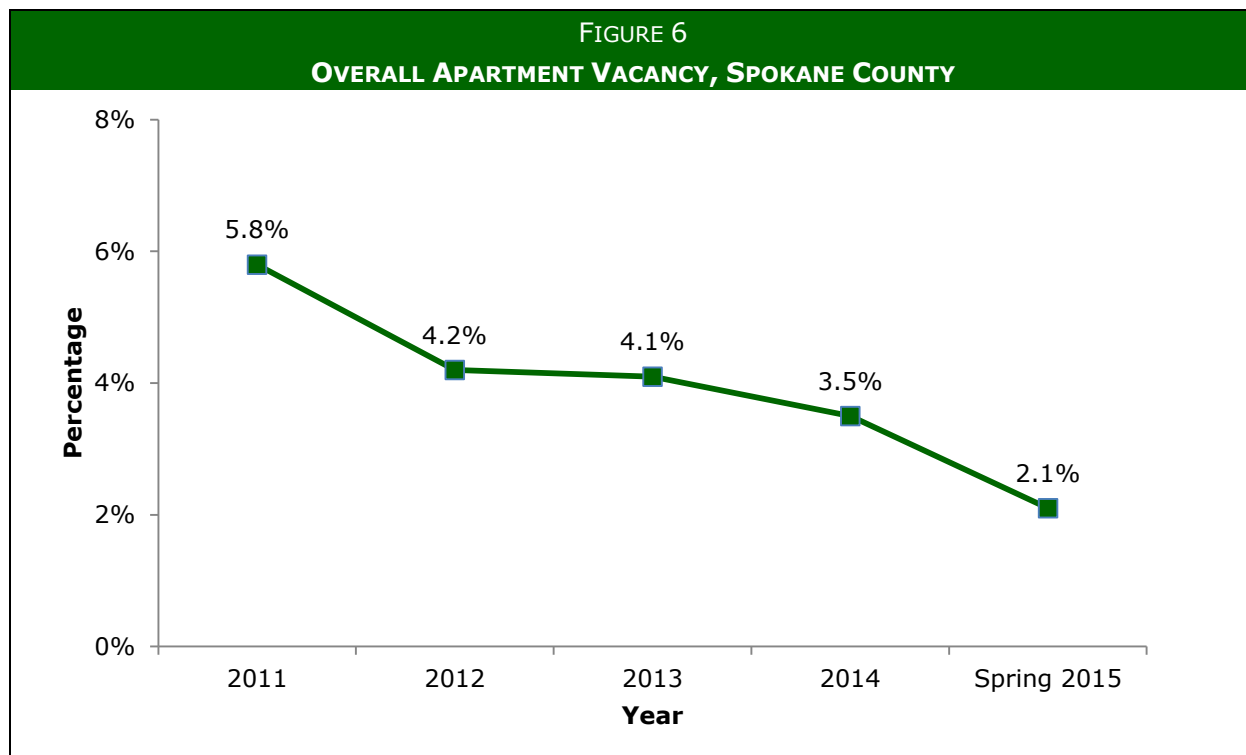
TABLE 12 CITY OF SPOKANE AND STUDY AREAS HOUSING BY OWNERSHIP. 2013					
GEOGRAPHY	OWNER- OCCUPIED UNITS	RENTER- OCCUPIED UNITS	TOTAL OCCUPIED UNITS	TOTAL VACANT UNITS	TOTAL HOUSING UNITS
HOUSING UNITS					
BI/Downtown	125	2,042	2,167	342	2,509
University	149	747	896	182	1,078
City of Spokane	49,298	37,506	86,804	7,589	94,393
PERCENT DISTRIBUTION					
BI/Downtown	5.0%	81.4%	86.4%	13.6%	100.0%
University	13.8%	69.3%	83.1%	16.9%	100.0%
City of Spokane	52.2%	39.7%	92.0%	8.0%	100.0%
STUDY AREAS OCCUPANCY STATUS AS A PERCENT FOR THE TOTAL UNITS IN THE CITY OF SPOKANE					
BI/Downtown	0.3%	5.4%	2.5%	4.5%	7.0%
University	0.3%	2.0%	1.0%	2.4%	3.4%

Source: ADE, Inc. American Community Survey 5-year estimates 2013

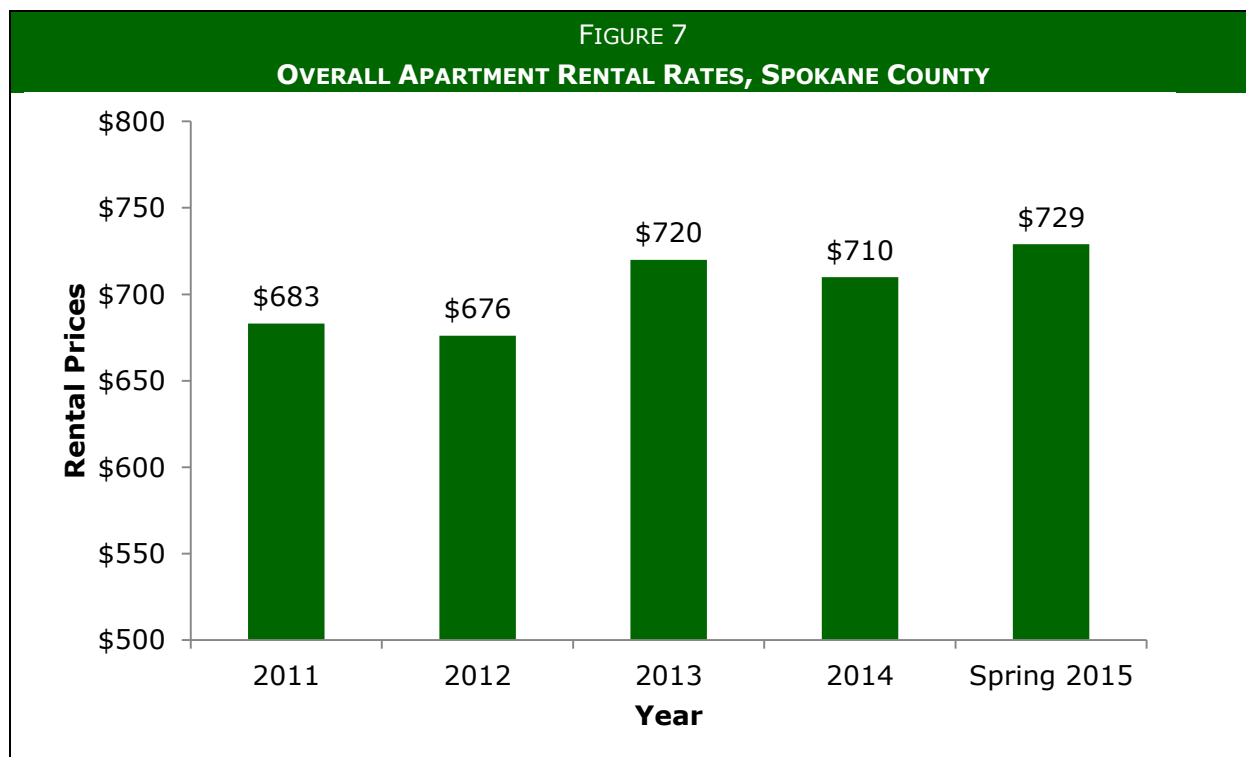
VACANCY TRENDS

Despite the development of new units, apartment vacancy rates have continued to fall since at least 2011 (**Figure 6**). As of mid-year 2015, the apartment vacancy rate in Spokane County is estimated at 2.1 percent. As expected rental rates have been increasing during this time as well, reaching an average of \$729 per unit as of Spring 2015 (**Figure 7**). As shown in **Table 13**, rental rates average about \$500 for studios up to \$970 for 3 bedroom units. The available data suggests that average market rents range from about \$0.82 to \$1.10 per sq. ft. countywide, aside from 3 bedroom, 1 bath units that apparently are relatively unpopular. In Central Spokane, however, rents reach upward to \$1.30 per sq. ft. This area includes both Downtown Spokane and the University District. In fact, two new projects have achieved higher rents. Kendall Yards, a new construction project northwest of Downtown is renting at about \$1.50 per sq. ft. and the Michael Building, an upscale adaptive reuse

project in Downtown, rented up quickly at \$2.00 per sq. ft. These projects are discussed in more detail later in the report.



Source: Runstad Center for Real Estate Studies/University of Washington



Source: Runstad Center for Real Estate Studies/University of Washington

TABLE 13 APARTMENT MARKET BREAKDOWN BY UNIT TYPE			
UNIT TYPE	VACANCY %	AVERAGE RENTAL RATES	AVERAGE RENT/Sq/Ft
Spokane County			
Studio	2.3%	\$516	\$1.10
1bd/1ba	1.4%	\$614	\$0.92
2bd/1ba	2.3%	\$710	\$0.84
2bd/2ba	1.7%	\$809	\$0.83
3bd/1ba	9.2%	\$848	\$0.56
3bd/2ba	2.5%	\$970	\$0.83
Total County	2.1%	\$729	\$0.88
Central Area*			
Studio	1.7%	\$456	\$1.31
1bd/1ba	1.4%	\$586	\$1.14
2bd/1ba	1.4%	\$745	\$1.08
2bd/2ba	NA	NA	NA
3bd/2ba	0.9%	\$865	\$0.73
Total Central Area	1.3%	\$676	\$1.10

Source: Runstad Center for Real Estate Studies/University of Washington

*Central Area is North of I-90, West of Havana St., South of Euclid, East of Latah Creek/Spokane River.

As in most cities, new residential construction dipped during the recession and sales volumes are recovering slowly. However, prices have recovered more rapidly and the median new home price in 2014, at \$254,199, exceeded the previous high point in 2007 (**Table 14**).

TABLE 14 NEW CONSTRUCTION SALES IN SPOKANE COUNTY			
YEAR	SALES	AVERAGE PRICE	MEDIAN PRICE
2014	650	\$273,949	\$254,199
2013	692	\$258,414	\$237,603
2012	540	\$245,691	\$219,594
2011	498	\$228,572	\$204,930
2010	553	\$232,013	\$206,500
2009	569	\$262,460	\$219,925
2008	805	\$286,677	\$248,944
2007	1,259	\$292,644	\$251,000
2006	1,424	\$278,791	\$249,150
2005	1,442	\$254,535	\$214,900

Source: Spokane Association of Realtors

RECENT TRANSACTIONS AND CAP RATES

In 2014, there were several transactions of multifamily apartment units in downtown and north of the City center along the Spokane River near Spokane Community College, including the 47-unit Riverton Terrace Apartment built in 1970 purchased by Kenneth Wilkinson from Inland Group for \$1.8 million. The other transactions were purchased and sold by private owners, with several apartments being sold in 2008 and 2009 during the market recession period. No transactions were recorded between 2010 to

2012 during the market recovery, while more sales activities occurred in 2013 and thereafter (**Table 15**).

The City had an average cap rate^[1] of 6.5 percent between 2010 and 2015, according to recent transactions from Real Capital Analytics. This was the same as the national average during this time, however the rates have fluctuated from year to year. In 2014, the City had a slightly higher average cap rate at 6.3 percent than the national cap rate of 6.0 percent. This indicates that rental residential buildings were valued at a slightly higher price in relation to rents in the nation than the City. In comparison to the County, however, the City had a lower rate in 2013, at 7 percent compared to 8.8 percent (most recent available for the County). This signifies an overall slightly higher building value in the City compared to the County of Spokane.

^[1] The capitalization (cap) rate is the ratio between the net operating income from a property and its sales value. Sales value is determined by dividing net income by the cap rate. Therefore, a lower cap rate generates a higher value in relation to net income.

TABLE 15
RECENT SELECTED SPOKANE COUNTY MULTIFAMILY TRANSACTIONS

PROPERTY NAME	DATE	PRICE	SIZE	\$/UNIT	BUILT	BUYER NAME (TYPE)	SELLER NAME (TYPE)
Big Trout Lodge	12/17/2013	\$29,000,000	297	\$97,643	1999	Kennedy-Wilson Properties (Institutional)	The Wolff Company II (Private)
Canyon Bluffs Apartment	12/1/2014	\$24,250,000	240	\$101,042	2005	Horowitz Group (Private)	Greater Mountain Financial
Harbor Crest at Cedar Canyon	3/12/2013	\$21,162,086	160	\$132,263	2001	Health Care REIT (Public)	MBK Senior Living (Private)
Eagle Rock	5/20/2014	\$16,300,000	210	\$77,619	1997	Charles V Eckert III Law Office (Private)	Thomas Wolff and Company (Private)
Dear Creek Apartments	11/30/2012	\$13,850,000	156	\$88,782	2006	Horowitz Group (Private)	Vandervert Developments (Private)
Willowbrook Apartments	6/21/2013	\$6,791,617	110	\$61,742	1991	Investor Capital Group (Private)	Northwood Family Investment (Private)
Forest Park	6/30/2014	\$4,722,000	80	\$59,025	1987	Craig McLaughlin (Private)	Larry Browtn (Private)
18715 E Boone Ave	11/14/2014	\$3,600,000	26	\$138,462	1987	n/a	Diamond Rock Construction (Private)
Regal Heights Apartments	4/24/2014	\$2,340,679	38	\$61,597	1992	Aileen Warner (Private)	David Golden (Private)
Gray Court	11/21/2014	\$2,329,000	48	\$48,521	1975	n/a	n/a
Marietta Villa	8/28/2012	\$2,295,000	46	\$49,891	1985	KS West Investment (Private)	Auburn Apartment Investors (Private)
Regal Village	12/3/2012	\$2,038,000	58	\$35,138	1972	Ryan Douglas	James and Mischa Wynhausen
Riverton Terrace Apartments	11/3/2014	\$1,835,000	47	\$39,043	1970	Kenneth A Wilkinson (Private)	Inland Group (Private)
Turning Leaf Townhomes	6/10/2013	\$860,000	32	\$26,875	1988	Lee Camey (Private)	Inland Northwest Bank (Institutional)
2824 E Wabash Ave	9/15/2012	\$415,000	21	\$19,762	1973	NAI Black (Private)	PNC Financial Services Group (Institutional)
406 E Montgomery Ave	10/28/2013	\$315,000	22	\$14,318	1908	n/a	n/a

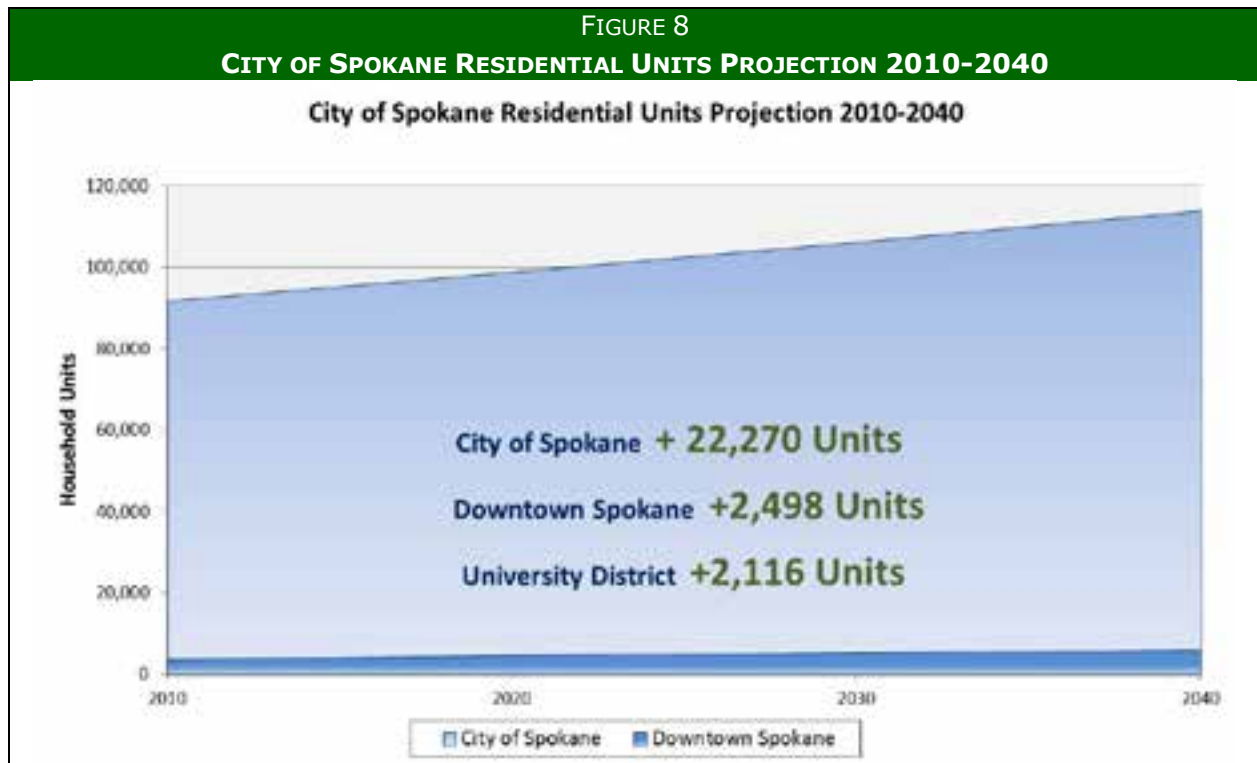
Source: Co-Star Portfolio Strategy 2015, Submarkets Rent Comps, ADE, Inc. 2015

RESIDENTIAL MARKET DEMAND

Projected residential growth, employment trends, and demographic shifts typically will result in changes in resident preferences for housing unit types and density in a neighborhood, as well as preferences for close proximity to work. To project the citywide and Study Areas housing demand, ADE uses multiple data sources including evaluating GIS data from the Spokane Regional Transportation Council for the three Study Areas, the population and employment growth projections over the next three decades from SRTC, the City of Spokane's Planning Department historical trends for multifamily and single-family housing permits, and the real estate market trends and conditions.

POPULATION AND HOUSING UNIT PROJECTIONS

The City is expected to have an increase in population through 2040 of 45,814 people, from 208,910 in 2010 to 254,730 in 2040, an increase of 22 percent. A close analysis of the GIS data provided by SRTC shows that the agency projects an increase of 22,270 units in Spokane during this period. Downtown Spokane is expected to increase from 3,704 to 6,202 housing units, while the UD is expected to add an additional 2,116 housing units during the period of 2010 to 2040 (**Figure 8** and **Table 16**).



Source: Spokane Regional Transportation Council, City of Spokane Planning Department, U.S. Census, ADE, 2015

TABLE 16 CITY OF SPOKANE STUDY AREAS PROJECTED HOUSING UNITS 2010-2040						
	2010	2020	2030	2040	CHANGE 2010- 2040	PERCENT CHANGE
Housing Units						
Downtown Spokane	3,704	4,395	5,215	6,202	2,498	67.4%
UD	992	1,452	2,125	3,108	2,116	213.3%
City of Spokane	94,291	101,400	109,400	116,561	22,270	23.6%
Growth Percentage (10 Years)						
Downtown Spokane	n/a	18.66%	18.66%	18.93%		
UD	n/a	46.37%	46.35%	46.26%		
City of Spokane	n/a	7.51%	7.59%	6.45%		

Source: Spokane Regional Transportation Council, U.S. Census, ADE, 2015

RESIDENTIAL HOUSING TYPE PROJECTION

Across the nation, significant transformations in households over the past years have led to changes in neighborhood and housing preferences, resulting in major shifts from predominantly single-family detached houses in lower-density suburbs to higher-density multi-family apartment units, townhouses, and attached houses in urban and mixed-use neighborhoods. This housing preference is likely to continue at least over the next decade, and represents a demographic shift as a result of Baby Boomers aging and Generation Y demographic growth serving as the foundation on which the City can further develop its downtown neighborhood with higher-density residential housing and mixed-use commercial spaces.

Baby Boomer households (65+ years old) include empty nesters and retirees that choose to move to new condominiums, apartments, or townhouses in downtown neighborhoods after their children have left home, while Millennial and Generation Y (18-34 years old) are young professionals and families that choose to live in urban neighborhoods adjacent to urban centers with amenities and services. These two demographics represent a large portion of the market demand, particularly for higher-density residential housing types, and will drive housing demand in the City for multi-family residential in the future, especially in the City's waterfront areas, downtown, and the UD.

As noted at the outset of this chapter, Spokane has seen an increasing trend in multi-family housing production. According to SRTC, this trend is projected to continue in the future. SRTC's Horizon 2040 forecasts show an inventory of 147,492 **occupied** single family units in the County in 2010, which is projected to grow by 46,425, or 31%, by 2040. SRTC also shows 39,676 **occupied** multi-family units in 2010, which is projected to grow by 24,663, or 62 percent, by 2040.⁴⁰ While the majority of housing units in the 2010 base and the 2040 forecast are single-family, according to SRTC, there is a

⁴⁰ SRTC, *Horizons 2040*, Appendix B, p. B-16. SRTC's unit counts for 2010 do not immediately reconcile with the housing inventory shown in Table 9 above, which is based on the Census and State of Washington data, even accounting for vacancy rates. However, SRTC's unit growth projections are based on their population projections and if their multi-family growth projection is applied to the Table R-1 multi-family inventory for 2009 (including duplexes), it would amount to 49 percent growth, still well above the single family rate.

definite trend forecasted in Horizon 2040 towards more rapid multifamily housing development in the region.

SELECTED RECENT AND PROPOSED MULTI-FAMILY RESIDENTIAL PROJECTS

The following projects provide a representative description of current market demand in and around the Downtown and UD areas.

Kendall Yards. Located on 78 acres along the north banks of the Spokane River, immediately northwest of Downtown, this project has achieved extraordinary success in creating an urban living environment near downtown. Approved for 1,088 dwelling units and 700,000 sq. ft. of commercial and office space, the development has so far built and occupied 343 units (182 rental apartments and 161 for-sale homes) and 53,000 sq. ft. of retail space, with an additional 31 dwelling units pending sale or under construction as of October 2015. The market demographic in the early stages of the project has been couples and single adults across the full range of age groups, from young professionals through senior citizens.⁴¹

The Michael Building. The 125-year-old former City hall was recently renovated with three floors of residential over ground floor commercial. As of June 2015, 16 of the 18 dwelling units had been occupied at an average rent of \$2.00 per sq. ft. In addition, 85 percent of the ground floor commercial has been leased to a restaurant and specialty retail stores, with planned openings later in 2015.⁴²

940 North Apartments. This 213-room complex is under construction with a completion date of July 2016. It is directly adjacent to the Gonzaga Campus and would likely cater mainly to the student population.

Matilda Building. The developers broke ground in August 2015 for an 88,000-sq.-ft. project in the Logan Neighborhood northeast of Gonzaga University. Owned by John Stockton, former Gonzaga and NBA basketball star, the project will have 57 residential units plus retail.

Jefferson and Norman Buildings. In July 2015, it was reported that Yellow Door Properties, LLC, a Spokane based real estate investment concern, bought two adjacent downtown buildings and plans to rehabilitate the structures as mixed use retail and residential developments. While the dollar amount of the sale transactions were not disclosed, the assessed value of the buildings equate to about \$20 - \$40 per sq. ft. The developer plans to build residential units of 1,500 sq. ft. or more.

Falls Tower. Spokane developer Lanzce Douglas has submitted a predevelopment application for a 26-story mixed use project at the corner of Division Street and Spokane Falls Blvd. The project would include 171 residential units, ground floor commercial and six floors of parking above the commercial.

UD AND DOWNTOWN HOUSING DEMAND

Using the findings from the socio-economics section, residential real estate market assessment evaluation, data from SRTC, U.S. Census, and interviews with each University representative, ADE

⁴¹ Jim Frank, Greenstone Development, personal communication, July 2015.

⁴² "Updated Michael Building in downtown Spokane fills with tenants." By Kevin Blocker, Spokane Journal. June 18, 2015.

evaluated the demand for off-campus university housing units in the UD, as well as excess demand for housing that may occupy areas outside of UD, such as Downtown Spokane. While Gonzaga University provides on campus housing for a portion of its study body, the other universities in the UD are not residential campuses and they anticipate relying on the private sector to provide off-campus housing to their growing student enrollments.

As noted above, SRTC projects an increase in housing unit need in the Downtown and the UD of 4,436 units between 2010 and 2040. In its projections report, SRTC states that planned development in these areas would support an increase of 6,000 residents.⁴³ This reflects an average household size of 1.3 persons, and is consistent with the high proportion of students and other non-family households living in these areas. There are several population segments that will contribute to this future demand, including not only university related students and employees but also new workers in other businesses as job levels expand in both the UD and Downtown. One can add to this the increasing demand from both younger demographics, including college students and younger professionals, and older, retired age cohorts, who are interested in urban living environments for quality of life reasons.

The university and job related segments of demand are summarized in **Table 17** below.

- UD Share of County Student Growth: SRTC projects 35.2% growth in the county university student population. ADE estimates there are currently 12,300 university students in the UD. Adjusting for estimated growth since 2010 when the SRTC projections begin, the UD has about 45 percent of the county university student population and about 40 percent of its university employee job base. If the UD sees a commensurate share of growth then it should add 4,061 students and 621 university staff between 2010 and 2040.
- The other UD employment growth and the Downtown growth are also taken from SRTC GIS projections data, as was shown in Table 7 earlier in the report.
- The increase in students and employment in these areas equals about 10,400 persons. At 1.3 persons per household, this would equate to demand for 7,990 new units, 73 percent more than the 4,615 projected. The projected growth in housing in these areas is only 59 percent of these direct sources of demand.
- The demographic characteristics of these market segments will not all match the likely profile for new housing in the Downtown or UD. Many of the new employee households would be in the market for single family homes and would not necessarily consider the Downtown or UD as an appropriate location for family housing. However, at the same time, the demographic shifts that are driving increases in both younger households and retiree households throughout the rest of the City will add to demand for multi-family housing products in the Downtown.

⁴³ Ibid., p. B-6.

TABLE 17 SOURCES OF FUTURE HOUSING DEMAND IN DOWNTOWN AND THE UD		
HOUSING DEMAND SEGMENTS		NOTES
Total Projected Pop Growth	6,000	SRTC Projection
Projected Housing Growth	4,615	SRTC (based on 1.3 persons per hshld.)
UD Share of County Student Growth	4,061	SRTC County rate
UD Share of University Employment Growth	621	SRTC County rate
Other UD Employment Growth	1,016	SRTC Projection
Projected Downtown Employment Growth	4,436	SRTC Projection
Subtotal	10,134	
Total Housing Demand (@1.3 pph)	7,796	
Projected Demand as Percent of Direct Student and Job Growth	59.2%	Does not include potential demand from citywide demographic shifts

Source: SRTC, ADE 2015

CONCLUSION

The City has had an increase in residential multifamily development in recent years. To continue to attract residential development in the City, several key points should be considered:

- Favorable demographics conducive to a renting population and higher density residential development
- Easy access to downtown and the UD, including mass transit
- Proximity to major job centers including corporate headquarters, medical network, and university network
- Strong local education network and health care facilities including hospitals and clinics
- High-tech employment within a short commute may lead more workers to prefer living Downtown or in the UD, increasing demand for multifamily units
- High quality of life includes the retail and park amenities in downtown area that will attract residents to live and work in downtown
- Limited multifamily supply coupled with low vacancy rates and high market demand will increase future demand for more medium to high density residential development
- Ongoing revitalization efforts by the City will attract future development

RETAIL MARKET ANALYSIS

INTRODUCTION

Retail development is closely dependent on population, employment rates, consumer confidence, and household income growth. The Spokane region has a number of retail attractions including River Park Square in Downtown Spokane, North Town Mall, and Spokane Valley Mall, in addition to many local general and boutique retailers throughout the City and the region.

The majority of the retail spaces are located along Interstate 90 and North of the City along Highway 395. Downtown Spokane has an anchor retail complex, the River Park Square, which features several anchor tenants including Nordstrom, Macys, Apple, Anthropologie, and the upcoming Urban Outfitters. It is located in the heart of Downtown Spokane adjacent to the Monroe Street Bridge. The retail complex also includes a Children's Museum, a movie theater, wine cellars and tasting rooms, restaurants, and a variety of specialty retail stores.⁴⁴

CURRENT MARKET CONDITIONS

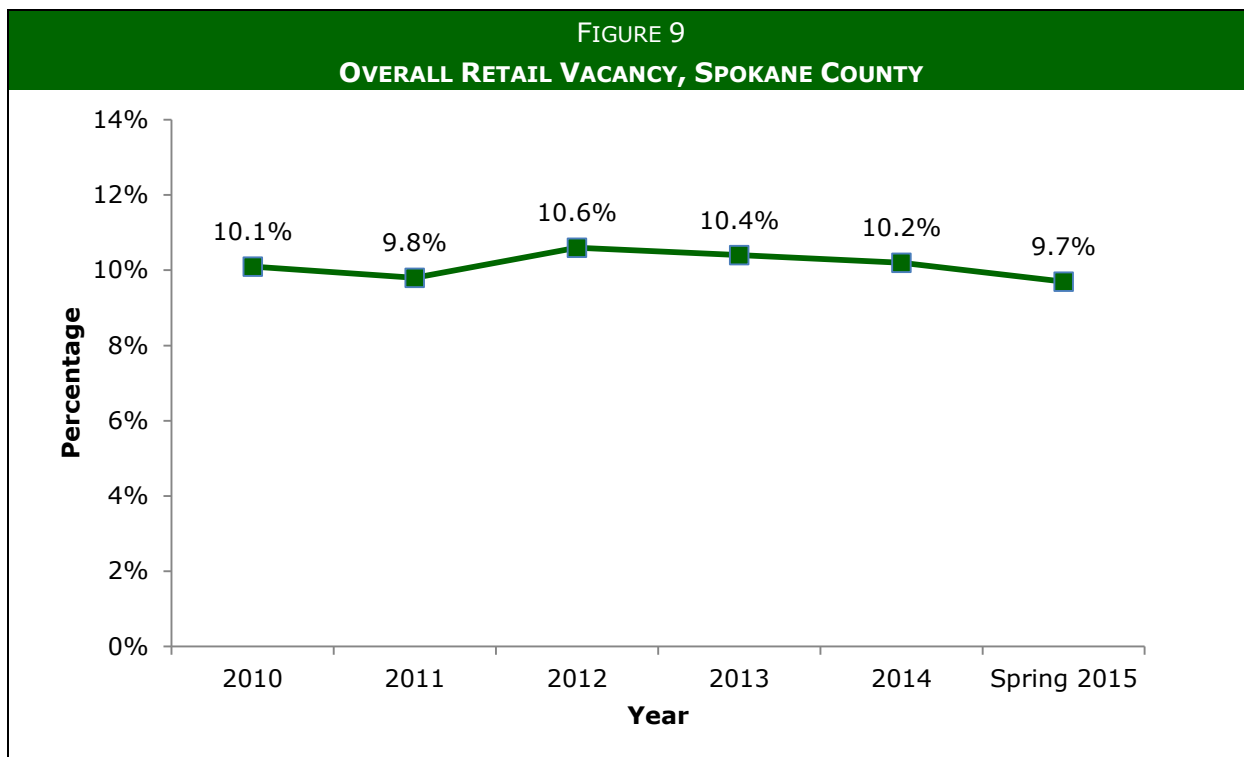
Local real estate advisory services track about 16 million sq. ft. of retail space in the County. The Central Business District (CBD) captures just under ten percent of this market, with another 5 percent in adjacent areas (**Table 18**). The CBD tends to have a higher vacancy rate, but also attracts higher end retailers such as the Apple Store and Urban Outfitters.

TABLE 18 RETAIL MARKET BREAKDOWN, SPRING 2015				
SUBMARKET	SURVEYED INVENTORY	PERCENT OF TOTAL	VACANT INVENTORY	VACANT PERCENT
CBD	1,553,298	9.7%	186,822	12.0%
Close-in	872,680	5.4%	73,366	8.4%
South	1,162,980	7.2%	50,114	4.3%
North	5,937,665	37.1%	706,722	11.9%
Valley	6,280,609	39.1%	510,615	8.1%
West	249,269	1.5%	18,690	7.5%
Total	16,056,501	100.0%	1,546,329	9.7%

Source: Valbridge Property Advisors, as reported by Kiemle & Hagood Company. Market review & Outlook, Mid-Year 2015.

Overall retail vacancy rates have been relatively stable over the past five years, with a moderate downward trend over the past three years (**Figure 9**). Nationally reported figures show even lower vacancy figures as shown in **Table 20**.

⁴⁴ Visit Spokane Map; ADE interview with Visit Spokane, April 7th 2015, ADE.



Source: Valbridge Property Advisors

Thirty percent of the retail stock is more than 45 years old (**Table 19**). However, the County did see a surge in retail development in the 2000's and recently has begun to see more development as well, notably a new Target store in the southeast area of town. A City-commissioned study at the end of 2014 reported that there were 29 retail projects in the development pipeline totaling 657,000 sq. ft.⁴⁵

TABLE 19 RETAIL INVENTORY BY CENTER AGE	
YEAR BUILT	PERCENT
Before 1970	30.0%
1970-1979	7.0%
1980-1989	31.0%
1990-1999	7.0%
2000-2009	21.0%
After 2009	4.0%
Total	100.0%

Source: REIS, Inc. Data as of 12/31/14

Recent Transactions

According to REIS Analytics, the regional market has had several sales transactions in 2014 and 2015⁴⁶:

⁴⁵ University District Integrated Planning Study, Market Assessment. Heartland. December 2014. P. 7

⁴⁶ Co-Star Portfolio Strategy 2014 Q3; REIS Retail Market Report 2014 4th Quarter; ADE, Inc.

- **20 E Indiana Avenue** – Sold on 02/2/2015 at \$250,000 sales price at \$96 per sq. ft. The building was built in 1968, with a total of 2,600 square feet.
- **4107 E Sprague Avenue** – Sold on 10/01/2014 at \$250,000 at \$46 per sq. ft. Building was built in 1929 and is 5,468 square feet.
- **5524 N Wall Street** – Sold on 9/19/2014 at \$362,000 and \$84 per sq. ft. Building was built in 1986 and total size is 4,285 square feet. This building was fully occupied with tenants, including the Nailry salon.

MARKET PROJECTION

REIS, a national real estate analytics firm, provides a short term projection of retail demand that suggests further development opportunities. In REIS' dataset, retail vacancies did not quite reach 10 percent, as shown in **Figure 9** above, but asking rents did fluctuate from a recent high of \$17.16 in 2009 to a low of \$16.75 in 2011 and then again in 2014. However, average household income growth is projected to outpace both population and household growth in the near term further increasing retail spending, reducing vacancy rates and leading to an upward trend in retail lease rates (Table 20).

As discussed in the socioeconomic section, the UD has lower per capita incomes than the City as a whole but much of this is due to the student population, and does not necessarily reflect retail spending potential due to parental financial support. Other areas of the Downtown actually have higher incomes than the City average. With increasing household incomes, coupled with the up-and-coming culinary scene and the continued visitor draws to the regional festivals, the local spending power will increase as the current young and middle-aged populations expand their spending power.

The population in the City and the region has grown steadily and is projected to continue to grow over the next 30 years. Spokane County unincorporated area is projected to add another 74,089 residents while the City of Spokane will have an additional 45,814 in total population by 2040, generating greater demand for retail and commercial services throughout the County. As discussed in the previous chapter, the Downtown and UD are projected to add over 4,600 households by 2040 and nearly 6,100 jobs. As this development occurs there are a number of opportunities for neighborhood retail development as well as adding more national brands. The South UD area in particular, is projected to add housing for students and young professionals but currently has relatively few retail services. In addition, the West Main area has developed into an exciting boutique retail block and further expansion of housing in the UD and the Downtown to add to the market support for these kinds of unique shopping and entertainment areas.

While the local residents are currently comprised of an employee demographic commuting into the City of Spokane for work, future employees and residents may be anticipated to desire a more active community near the amenities in the downtown area based on national trends. This demographic would be expected to have higher purchasing power and also increased demand for retail services. As such, more national retailers or community-serving, local boutique retail stores may accommodate future residential and employee growth. With the success of River Park Square, it is likely that more

TABLE 20

SPOKANE COUNTY RETAIL MARKET TRENDS AND PROJECTIONS

YEAR	QTR	VACANCY RATE	VACANCY CHANGE (BPS)	ASKING RENT	ASK RENT % CHG	POPULATION	POP % CHG	HOUSEHOLDS	HH % CHG	AVG HH INCOME	AHHI % CHG
2009	Y	7.6%	-10	\$17.16	-0.9%	470,520	1.1%	186,850	1.3%	\$88,182	-2.8%
2010	Y	8.3%	70	\$16.83	-1.9%	472,860	0.5%	188,590	0.9%	\$89,017	0.9%
2011	Y	8.1%	-20	\$16.75	-0.5%	474,560	0.4%	190,340	0.9%	\$92,407	3.8%
2012	Y	7.0%	-110	\$16.81	0.4%	477,610	0.6%	192,010	0.9%	\$98,180	6.2%
2013	Q1	7.2%	20	\$16.92	0.7%	478,490	0.2%	192,500	0.3%	\$65,284	-
2013	Q2	7.8%	60	\$19.96	18.0%	479,400	0.2%	192,760	0.1%	\$95,575	33.5%
2013	Q3	8.4%	60	\$16.97	-15.0%	480,320	0.2%	193,330	0.3%	\$96,192	46.4%
2013	Q4	9.2%	80	\$16.92	-0.3%	481,240	0.2%	193,700	0.2%	\$95,689	0.6%
2013	Y	9.2%	220	\$16.92	0.7%	481,240	0.8%	193,700	0.9%	\$95,689	-0.5%
2014	Q1	9.8%	60	\$16.85	-0.4%	482,180	0.2%	194,090	0.2%	\$95,689	-2.5%
2014	Q2	9.6%	-20	\$16.81	-0.2%	483,130	0.2%	194,350	0.1%	\$96,533	0.9%
2014	Q3	9.8%	20	\$16.83	0.1%	484,080	0.2%	194,430	0.0%	\$97,307	0.8%
2014	Q4	9.6%	-20	\$16.75	-0.5%	485,080	0.2%	194,780	0.2%	\$98,107	0.8%
2014	Y	9.6%	40	\$16.75	-1.0%	485,080	0.8%	194,780	0.6%	\$99,182	1.1%
2015	Y	9.2%	-40	\$16.77	0.1%	489,310	0.9%	198,100	1.7%	\$99,182	3.7%
2016	Y	8.8%	-40	\$17.03	1.6%	493,780	0.9%	201,650	1.8%	\$103,761	4.6%
2017	Y	8.7%	-10	\$17.49	2.7%	498,550	1.0%	205,090	1.7%	\$107,041	3.2%
2018	Y	8.5%	-20	\$17.95	2.6%	503,500	1.0%	207,850	1.7%	\$109,453	2.3%
2019	Y	8.5%	0	\$18.37	2.3%	508,510	1.0%	210,370	1.3%	\$111,135	1.5%
										\$112,276	1.0%

Source: REIS, Inc. Note: Population figures reported by REIS are slightly higher but within 0.1 to 0.3% of the census and State of Washington figures.

retail and commercial tenants at a smaller scale will be attracted to the growing City and downtown area without competing with the existing anchor retailers in the City. The downtown area will benefit from smaller retail chains that diversify the nature of the retail tenants, in addition to more boutiques, with local retailers in addition to the national chain stores.

Future small scale mixed-use development with a ground floor retail and commercial component in the downtown area may be considered depending on development feasibility based on zoning regulations, available parcels, and financial feasibility, in particular due to downtown's proximity to the UD and existing active retail and commercial activities in the downtown commercial district. The establishment of a local retail and commercial development would accomplish numerous goals: allowing residents living close to the UD and downtown, the opportunity to walk to work and shop, accommodate future residents and workers with the expansion of the Central City Line and local transit, and support the development of the downtown district.

DEVELOPMENT SITE OPPORTUNITIES AND FEASIBILITY

SITE CHARACTERISTICS AND OPPORTUNITIES FOR DEVELOPMENT

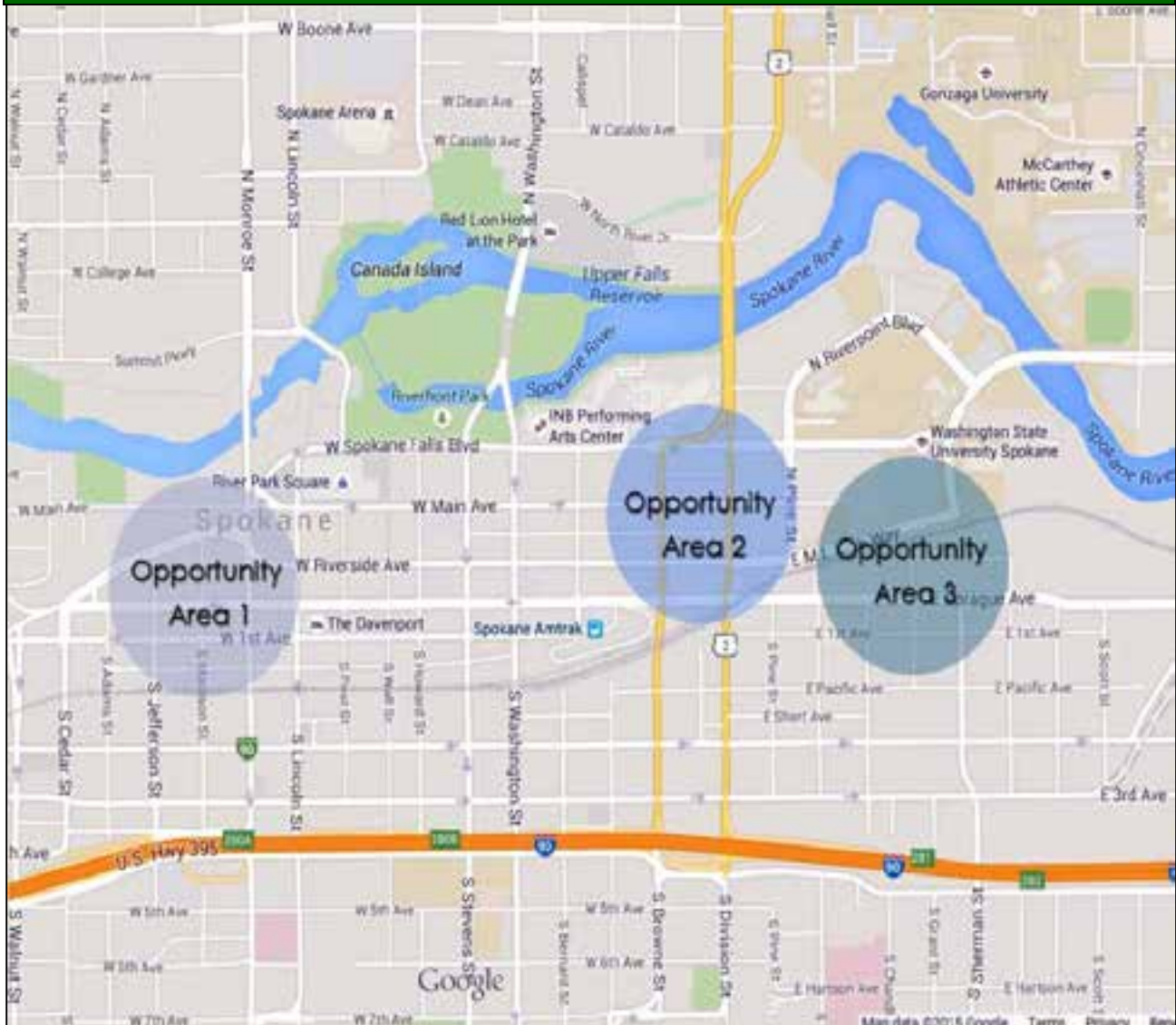
There are a number of future potential site development opportunities throughout the City, particularly in the downtown area and neighborhoods adjacent to the UD due to its proximity to amenities and accessibility. With vacant site data provided by the City and evaluation of recent and planned infrastructure projects and amenities, ADE has identified three areas for potential development opportunities in the City (see **Figure 10**), including: Opportunity Area #1) the West Downtown Spokane Historic District area southwest of the Riverpark Square; Opportunity Area #2) the neighborhood just west of the UD near the intersection of West Main and Division; and Opportunity Area #3) the areas adjacent to the south landing area of the proposed UD Gateway bridge connecting the UD across Martin Luther King Junior Way. Capitalizing on the analysis in the previous sections for the residential and retail market, the following general characteristics and attributes are evaluated to determine site opportunities and areas for potential development, to the extent that data is available:

- Proximity (adjacent land uses, nearby activity centers)
- Access and visibility (highways, transit systems, pedestrians)
- Site (size, shape, topography, soils)
- Services (utilities, roads, public facilities)
- Land use controls (zoning, subdivision regulation, code, local government)
- Potential uses (type and quality of use programmed, timing and size of market)
- Ownership (assembly, availability)
- Land Costs

According to the Growth Capacity Areas Land Quantity Report by SRTC, and interviews with the Planning Department, there are several vacant commercial and residential parcels that are sized and have the capacity to allow for higher-density development in addition to smaller, infill sites that can have multiple uses.⁴⁷ The central location of the downtown and the UD allow for easy access points and travel efficiency that will be increased by the Central City bus Line. In addition, the confluence of activities that bookends transition areas with different uses, festivities, and activities, allow for future single use or mixed use development.

⁴⁷ Spokane Regional Transportation Council, Horizon 2040 Land Use Planning, ADE, 2015.

FIGURE 10
OPPORTUNITY AREAS



OPPORTUNITY AREA #1

The downtown area has several vacant commercial parcels in the West Downtown Historic District at the Southeast of Glover Field Park, between W. Main Avenue and W. Sprague Avenue, and between N. Monroe Street through Jefferson Street to the edge of the downtown boundary. According to the Spokane Regional Transportation Council's Growth Capacity Areas Land Quantity Report, this area has the potential for more commercial and residential land use capacity.⁴⁸ There are several vacant commercial parcels in the area, which can be a future development potential extending the current

⁴⁸ Spokane Regional Transportation Council, Horizon 2040 Land Use Planning, ADE, 2015.

River Park Square area for more retail or mixed-use opportunities. The development potential in this area can accommodate multiple uses due to immediate adjacency to the downtown area.

OPPORTUNITY AREA #2

The City's West Main area east of Browne Street is an area with boutique retail and a bakery. There are a few vacant commercial sites scattered throughout the eastern portion of E. Main Street. The potential site development here can be mixed-use development that extends the West Main retail area to the UD, as well as providing more residential mixed-use development. Located in between the UD and the downtown area, this area can accommodate potential increases in development and capture the UD's residential and employee population.

OPPORTUNITY AREA #3

The future UD Gateway Bridge has a development opportunity on the parcels adjacent to the proposed bridge over E. Martin Luther King Junior Way. The future bridge that will connect the north and south side of the area provides direct access from the UD to the Sprague Avenue corridor.

HOUSING TYPOLOGY

A number of housing types have potential in the Spokane market. As discussed in the residential market analysis, recent projects include adaptive reuse and 2-3 story new construction, as in the Michael Building and Kendall Yards and others. As of summer 2015, there is also a proposal for a 26 story mixed use building in the area between downtown and the UD.⁴⁹ In collaboration with Steinberg Architects, examples of several housing prototypes have been compiled in **Figures 11 and 12** below. These types of projects could be done at different scales, depending on site characteristics and neighborhood conditions.

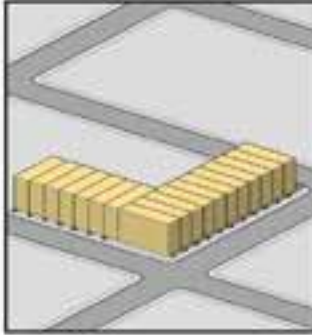
⁴⁹ "Lanzce Douglas Ponders 26 Story Mixed Use Tower" by Mike Douglas, Spokane Journal. July 2, 2015.

FIGURE 11

HOUSING TYPOLOGY

DOWNTOWN + UNIVERSITY DISTRICTS | SPOKANE

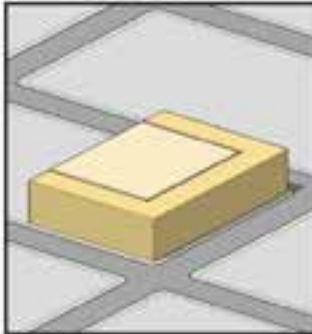
ROW HOUSE



height : 2-3 stories w. potential basement
context : medium density urban
zoning : residential | live-work | light-industrial
parking : sub-t garage | alley access | individual garage
pros : fee simple | individual stoop entry

Westgate Apartments
Steinberg Architects

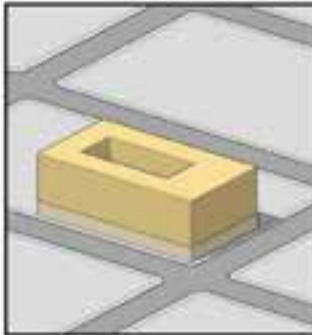
WRAP



height : 4-5 stories
type I or II around type I garage
context : medium - high density urban
zoning : commercial | mixed-use
parking : stand-alone garage behind residential
pros : ground floor can be retail or residential | lower construction cost than podium or high-rise

The Aviator at Carson
Steinberg Architects

PODIUM



height : 6-7 stories
type I or II over type I podium
context : medium - high density urban
zoning : commercial | mixed-use
parking : sub-t garage
pros : ground floor retail w. housing above | lower construction cost than type I

The Pierce
Steinberg Architects

STEINBERG

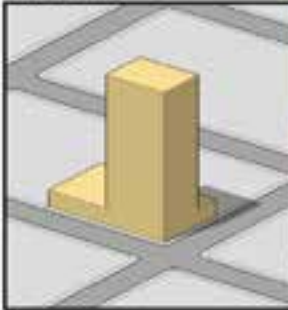
Source: Steinberg Architects

FIGURE 12

HOUSING TYPOLOGY

DOWNTOWN + UNIVERSITY DISTRICTS | SPOKANE

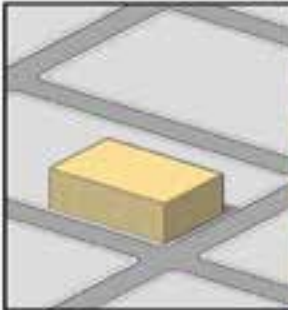
HIGH-RISE



height: 8+ stories | type i
context: high density urban
zoning: commercial | mixed-use
parking: sub-t garage and/or above-grade podium
pros: ground floor retail as housing solve | higher quality construction | higher density

3033 Blaine
Steinberg Architects

WAREHOUSE (ADAPTIVE RE-USE)



height: varies
context: industrial
zoning: industrial
parking: varies
pros: adaptive re-use of existing building | sustainable | adds to historic character | desired for creative office + live-work

The Cork Factory
Antonovich Associates

STEINBERG

Source: Steinberg Architects

LOCAL DEVELOPMENT INCENTIVES

As discussed earlier in the report, the City of Spokane has committed to extensive infrastructure investments in the University District and in Downtown Spokane over the next 20 years. For the University District Revitalization Area, these planned projects include:

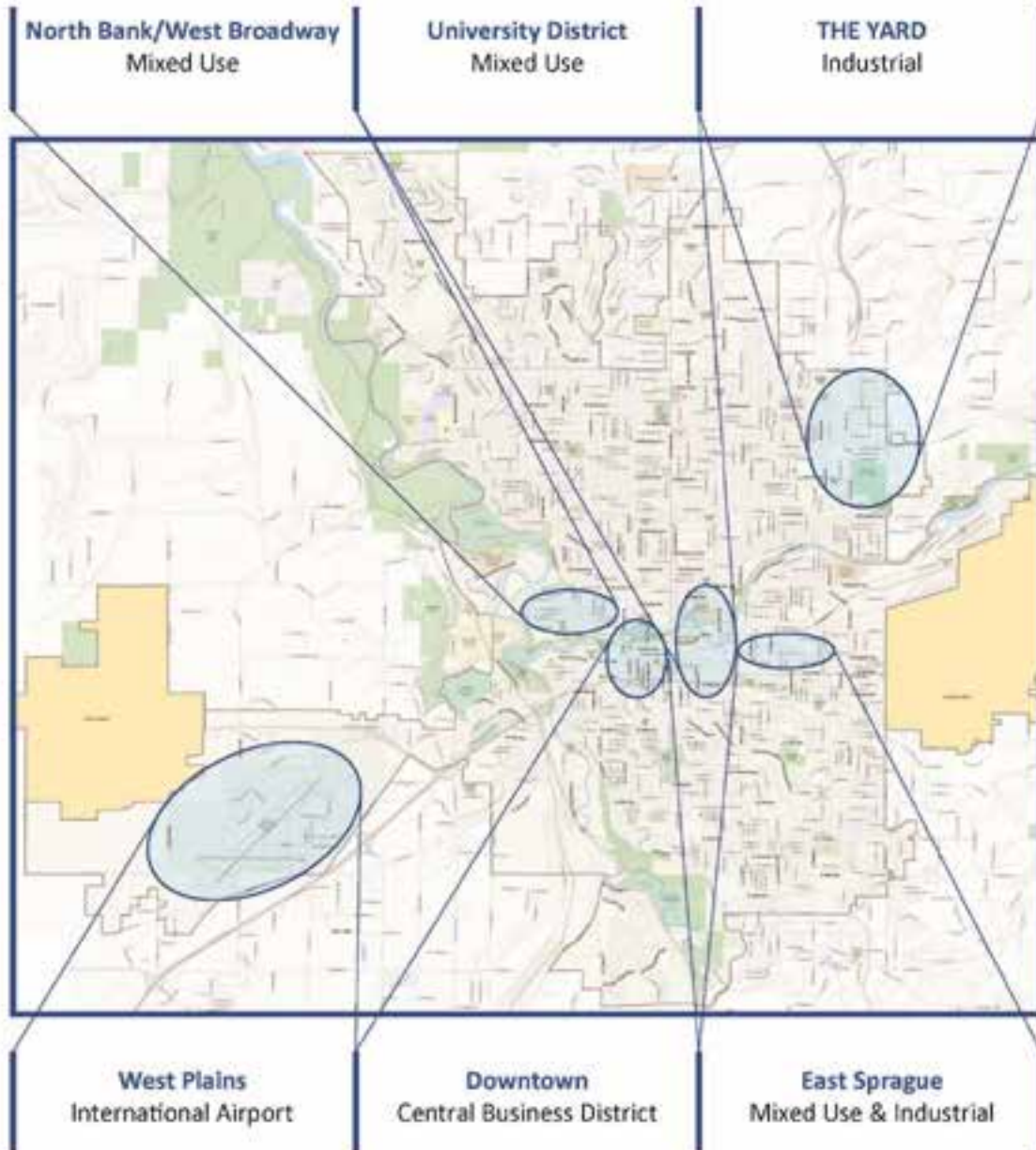
Streets and rail corridors	\$31,420,000
Water/Sewer	1,000,000
Transit	8,000,000
Parks	1,600,000
Storm drains	500,000
Planning/Environmental	600,000
Historic preservation	<u>500,000</u>
Total	\$43,620,000

These investments will support private development efforts to create attractive residential and commercial spaces as well as high quality neighborhood living and shopping environments.

In 2015, the City adopted a new Economic Strategic Plan with specific incentives for targeted areas in the City, including the Downtown and the University District. The exhibits on the following pages outline these incentives and related City policies.



Economic Investment Program






Economic Investment Program

Targeted Investment Partnerships

Partnership Assistance and Incentives Available		Within	Outside
<p>Financial Incentive Plan</p>	Building permit fee due at occupancy	✓	
	Traffic impact fee due at occupancy	✓	
	Brownfield redevelopment	✓	
	Brownfield remediation	✓	✓
	Home improvement tax exemption	✓	✓
	Blight remediation	✓	✓
	8- or 12-year Multi-Family (property) Tax Exemption (MFTE) - (Does not include The YARD in 2015)	✓	
	Historic preservation tax exemption	✓	✓
	Reduced multi-family utility costs	✓	
	General facilities connection (water & sewer) waiver (gfc)	100%	50% in CEZ
	Tax Increment Financing (TIF)	✓	
	ROW improvement requirements waived prior to public investment	✓	
	Urban utility installation program (downtown & sprague only in 2015)	✓	
Value-Added Targeted Area Assistance and Pre Planning			
<p>Revitalization Planning</p>	<ul style="list-style-type: none"> Target investment partnerships and planning (Brownfield, Integrated Capital . . .) SEPA planned action building blocks Comprehensive planning integration with growth strategies 		
<p>Target Area Development</p>	<ul style="list-style-type: none"> Arterial street improvements Combined Sewer Overflow (CSO) system improvements "Cleaner River Faster" Utility improvements (integrated planning) Streetscape/place-making improvements 		
<p>Economic Development Assistance</p>	<ul style="list-style-type: none"> Ombudsman assistance for applicants Bundling incentives into a "partnership portfolio" showing dollar value Creating ROW improvement agreements Securing federal, state and county incentives 		

Projects greater than \$5M in improvement value are considered projects of citywide significance. Staff will work with applicants on an incentive package to be approved by City Council prior to permitting.

10/10/2015

 Agenda Sheet for City Council Meeting of: 08/10/2015		Date Rec'd 7/21/2015 Clerk's File # RES 2015-0084 Renews # Cross Ref # Project # Bid # Requisition #
Submitting Dept	PLANNING & DEVELOPMENT	
Contact Name/Phone	SCOTT 625-6584	
Contact E-Mail	SMSIMMONS@SPOKANECITY.ORG	
Agenda Item Type	Resolutions	
Agenda Item Name	0650 - RESOLUTION - COMPREHENSIVE PLAN	
Agenda Wording		
A RESOLUTION regarding supporting and establishing the City's Economic Development Strategy to implement the City's Comprehensive Plan and growth strategies		
Summary (Background)		
This project is facilitated by the Spokane City Council, the Mayor, and Mayor's staff. These entities will collaborate to craft a set of business recruitment, retention, and expansion strategies the City can use to incentivize business development and economic growth in defined areas including target investment areas to be further defined by the Council President and Mayor Staff.		
Fiscal Impact		Budget Account
Neutral	\$	#
Select	\$	#
Select	\$	#
Select	\$	#
Approvals		Council Notifications
Dept Head	MEULER, LOUIS	Study Session
Division Director	SIMMONS, SCOTT M.	Other PCED 7/20/15 PC
Finance	SALSTROM, JOHN	Distribution List
Legal	RICHMAN, JAMES	lhattenburg@spokanecity.org
For the Mayor	CODDINGTON, BRIAN	aworlock@spokanecity.org
Additional Approvals		tstripes@spokanecity.org
Purchasing		smsimmons@spokanecity.org
		bstuckart@spokanecity.org

ADOPTED BY
 SPOKANE CITY COUNCIL:
August 10, 2015
[Signature]
 CITY CLERK

RESOLUTION NO. 2015-0084

A resolution regarding supporting and establishing the City's Economic Development Strategy to implement the City's Comprehensive Plan and growth strategies.

WHEREAS, in 2010 the Spokane City Council adopted resolution 2010-0049 establishing support for a Targeted Area Development strategy for economic development and a commitment to continue its economic development efforts utilizing the strategic approach of Targeted Area Development; and,

WHEREAS, this approach to economic development has continued to evolve and adapt to changing conditions both within the City and in the local, regional and national economies, and it is now appropriate that the strategy be reviewed and updated to reflect current conditions and best practices; and,

WHEREAS, it is the intent that this resolution build upon the work of the Targeted Area Development strategy to bring further alignment with capital infrastructure plans, community development, neighborhood planning and incentives policies, and clarify the City's role in economic development; and,

WHEREAS, it is recognized that a fundamental objective of the City's economic development policy is to align public investments in neighborhood planning, community development and infrastructure development with private sector investments resulting in increased opportunities for business growth and to provide its citizens with safe, affordable and quality residential living environments; and,

WHEREAS, new and expanded business activity within the City of Spokane can spur additional economic growth, provide living wage jobs, improve neighborhoods, increase property values, increase tax collections, raise wages and median income, and enhance the standard of living of all citizens in the City; and

WHEREAS, the dedication of public resources to help achieve these outcomes is within the public interest and is a legitimate function of City government when conducted in a predictable, transparent and accountable manner which includes appropriate metrics, or other measures to ensure that the programs are sustainable and generate real and measurable economic benefit to the areas of the City which most need the benefits; and,

WHEREAS, it is appropriate and fiscally responsible to align public and private investments in concentrated target areas and to bundle financial incentives to accelerate private investment in these areas which lead to implementation of the community vision expressed in adopted plans; and,

WHEREAS, since City government does not have the fiscal or human capacity to focus all its redevelopment resources everywhere at the same time, it is understood that the economic development focus must be on only a few priority target areas at a time; and,

WHEREAS, successful economic and community development policy must include housing, community and neighborhood improvements along with incentives for commercial,

NOW, THEREFORE, BE IT RESOLVED that the Spokane City Council supports the joint effort by the Council President and the Mayor to craft a set of business recruitment, retention, and expansion strategies which the City can use to incentivize business development and economic growth in specifically-defined areas of the City in a transparent, measurable, and sustainable manner, in support of development which increases not only the economic conditions of the citizens of the City of Spokane, but improves the standard and conditions of living for all the citizens of the City of Spokane.

BE IT FURTHER RESOLVED that the Council requests that the Council President continue to work diligently with the Mayor's staff to define the specific areas of the City which should receive increased focus for business recruitment, retention, and expansion strategies, to detail the mechanisms which can be deployed and how and when to measure the efficacy of those measures with partnership oversight, to strive for clarity and accountability in the creation of these development incentive tools, and to continuously give updates to and seek input from the Council as the project moves forward. Starting in 2015, these areas will include the target investment areas as included and described in Attachment "A".

BE IT FURTHER RESOLVED that the Council requests that the Council President bring forward a set of necessary and/or desirable changes to policies or procedures, the Spokane Municipal Code, and other guidance, such as illustrative forms, maps, white papers, background materials, and other documents as needed, for the Council's consideration as it considers a framework for focused, specific, measurable, transparent and impactful business recruitment, retention, and expansion strategies for the City of Spokane, including projects of Citywide significance which includes private investments of \$5 million (five million dollars) and greater.

Passed by the City Council this 10th day of August, 2015.

City Clerk

Approved as to form:

Assistant City Attorney



Attachment "A":

Section I: Target Investment Areas.

The following are designated target investment areas to which the City intends to dedicate public resources towards capital improvements, financial incentives and other resources including staff and administrative services:

Downtown Spokane: (Always)

- Downtown Zoning categories: Downtown General (DTG), Downtown Core (DTC), Downtown General (DTG) and Downtown South (DTS)

Spokane International Airport/ West Plains: (Always)

- Spokane International Airport property within City limits on the West Plains

University District: (Until 2020 and reassessed)

- University District Revitalization Area (UDRA) boundary

The YARD: (Until 2020 and reassessed)

- Market Haven Couplet - Market Corridor - to the east City limits, Garland north to City limits, 500 acres Industrial and 300 acres residential

East Sprague: (Until 2020 and reassessed)

- Hamilton to Fiske, Rail line to I90: Sprague Employment Center – CC1, CC2, Industrial, General Commercial, Residential, MF, Industrial Park

North Bank/Kendall Yards: (Until 2020 and reassessed)

- Existing North Bank TAD boundaries and Kendall Yards Subarea of the West Quadrant Tax Increment Finance Area (WQTIF)

Section II: Annual Reporting and Assessment.

Annual reporting and assessment will include:

- Economic Development Programmatic performance measures
 - Target Investment Area assessment, investments and outcomes (Public & Private)
 - Number of permits and total values
 - Project values
 - Public investment values
 - Construction sales tax
 - New utility users
 - Incentive values
 - Assessed Property values
 - Business Data
 - Retail sales data for districts
 - New businesses added
 - Jobs added
 - District Demographics
 - Income levels
 - Crime stats
 - Housing Vacancy rates
 - Ownership/Rental ratio
 - Target Investment Area adjustment recommendations by staff
 - Indicators, pressures, capital projects for future Target Investment Areas
 - Incentives Window of Opportunity

Revised, Rev'd 8-5-15

Section III: New Target Investment Area Selection Parameters.

For new areas approved by resolution at the time of annual reporting, selection parameters will include:

- Areas identified in the Comprehensive Plan for infill (Downtown, Centers and Corridors)
- The level of community and redevelopment planning in place within a defined area
- Readiness of the community stakeholders to embrace and champion public and private investment
- Project areas identified in the Regional Comprehensive Economic Development Strategy that align with federal and state priorities and commercial clusters (aerospace, manufacturing, distribution)
- Natural and Built environment (bluff, hill, river, major arterial intersections, I90, rail line, bridges)
- Zoning - primary target area zoning and optional 2-4 block surrounding area of influence
- City Limits
- Public Private Partnership organizations – Public Development Authority, Business Improvement District or similar business association
- Neighborhood Boundaries
- Major public improvement project limits
- Staff Resources

Section IV: Incentives

The City will consider reviewing existing incentive ordinances, adopting new incentives and establishing sustainable incentives budgets. In 2015, it is the intent of this resolution to utilize the following incentives:

- Building Permit Fees and Impact fees
- Brownfield Redevelopment
- Brownfield Remediation
- Home Improvement Tax Exemption
- Historic Preservation Tax Exemption
- Tax Increment Financing (TIF)
- ROW improvement requirements deferred to public investment
- General Facilities Connection fees
- Blight Remediation
- Multi-Family Tax Exemption (MFTE)
- Reduced Multi-Family Utility Costs
- Urban Utility Installation Program

Revised, Rev'd 8-5-15

09/14/15

 Agenda Sheet for City Council Meeting of: 09/14/2015		Date Rec'd	9/1/2015
		Clerk's File #	RES 2015-0101
		Renews #	
Submitting Dept	PLANNING & DEVELOPMENT	Cross Ref #	RES 2015-0084
Contact Name/Phone	SCOTT SIMMONS 625-6584	Project #	
Contact E-Mail	SMSIMMONS@SPOKANECITY.ORG	Bid #	
Agenda Item Type	Resolutions	Requisition #	
Agenda Item Name	0650 - AMENDED RESOLUTION - COMPREHENSIVE PLAN		
Agenda Wording A RESOLUTION regarding amendments to the City's Economic Development Strategy.			
Summary (Background) This project is facilitated by the Spokane City Council, the Mayor and Mayor's staff. These entities will collaborate to craft a set of business recruitment, retention, and expansion strategies the City can use to incentivize business development and economic growth in the defined areas including target investment areas to be further defined by the Council President and Mayor Staff.			
Fiscal Impact		Budget Account	
Neutral	\$	#	
Select	\$	#	
Select	\$	#	
Select	\$	#	
Approvals		Council Notifications	
Dept Head	MEULER, LOUIS	Study Session	9/3/15
Division Director	SIMMONS, SCOTT M.	Other	PCED 7/20/15
Finance	SALSTROM, JOHN	Distribution List	
Legal	RICHMAN, JAMES	lhattenburg@spokanecity.org	
For the Mayor	SANDERS, THERESA	aworlock@spokanecity.org	
Additional Approvals		tstripes@spokanecity.org	
Purchasing		smsimmons@spokanecity.org	
		bstuckart@spokanecity.org	

ADOPTED BY
SPOKANE CITY COUNCIL:

[Signature]
CITY CLERK

Resolution No. 2015-0101

A resolution regarding amendments to the City's Economic Development Strategy.

WHEREAS, on August 10, 2015 the City Council adopted a resolution (Resolution No. 2015-0084) which states their support for and established an Economic Development Strategy to implement the City's Comprehensive Plan and growth strategies; and

WHEREAS, the Economic Development Strategy provides for a targeted investment area approach through which public resources may be dedicated towards capital improvements, financial incentives and other assistance in certain areas of the City and for projects which are considered of "Citywide significance"; and

WHEREAS, Resolution 2015-0084 further provides that the Council President will work with the Mayor's staff regarding the specific areas to receive increased focus and the detail of the mechanisms which can be deployed to advance the objectives of the strategy; and,


WHEREAS, the Council has requested the Council President bring forward a set of necessary and/or desirable changes to policies or procedures, the Spokane Municipal Code, and other guidance such as illustrative forms, maps and other documents as needed for Council's consideration as it considers a framework for focused, specific, measurable, transparent and impactful business recruitment, retention, and expansion strategies for the City of Spokane, including projects of Citywide significance which includes private investments of \$5 million (five million dollars) and greater; and

WHEREAS, a work group which included members of the City Council, including the Council President and the Mayor's staff met on July 21, July 28, and August 11 to review and discuss the framework and details for Economic Development strategy; and


WHEREAS, the City Council at this time wishes to add Attachments "B" and "C" attached hereto to Resolution 2015-0084.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF SPOKANE that the City Council hereby adds Attachments "B" and "C" to the Economic Development Strategy as described in Resolution 2015-0084, providing guidance and direction which supplements and is in addition to that contained within Attachment "A" of said Resolution 2015-0084.

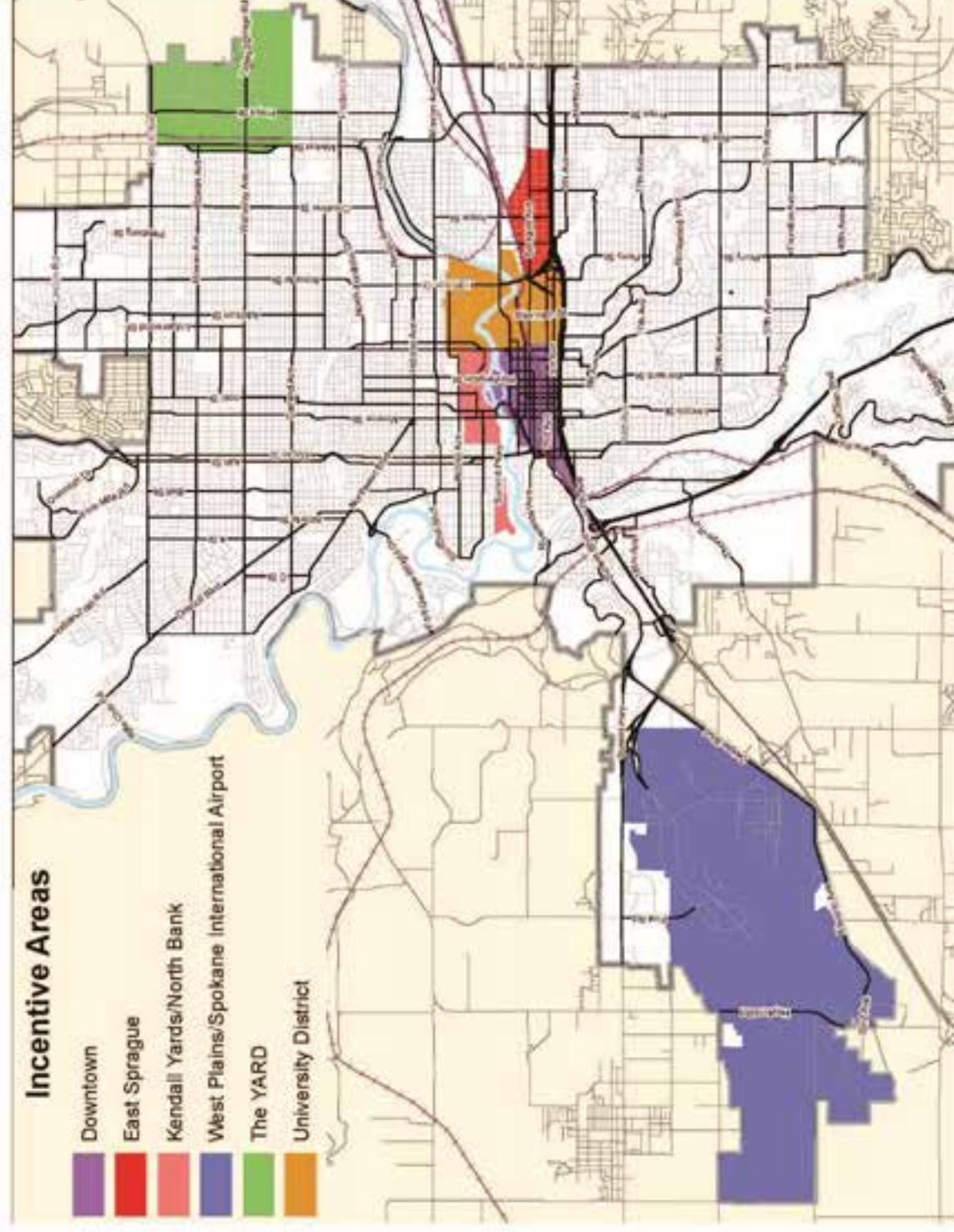
ADOPTED by the City Council this 14th day of September, 2015.


City Clerk

Approved as to form:


Assistant City Attorney





City wide	Within TIA	Partnership Assistance and Incentives Available
●	●	Historic Preservation – Special Valuation Tax Exemption (SMC 17D.040.310).
	●	ROW Improvement requirements waived prior to public Investment (Admin Policy).
●	●	Home Improvement Tax Exemption (RCW 84.36.400).
Within MFTE*		8 or 12 year Multi-Family (property) Tax Exemption (MFTE) (SMC 08.15) – Within MFTE target area boundary
Within Central Incentives Area*		General Facilities Connection (water & sewer) Waiver (GFC) – Within Central Incentive Area (SMC 13.03.0732 and 13.04.2042).
	●	Tax Increment Financing (TIF) (RCW 39.89).
	●	Commercial Rate Clarification Policy for existing buildings (Resolution 2014-0077 and Admin Policy 5200-14-04).
●	●	Traffic Impact Fee Due at Occupancy (SMC 17D.075.040(C)).
●	●	Brownfield Remediation.
	●	Brownfield Redevelopment (Integrated Planning).
●	●	Blight Remediation (CDBG funding).
	●	Urban Utility Installation Program (Downtown & Sprague only in 2016) (SMC 08.10.230).
●	●	"Projects of Citywide Significance" Financial Incentive (Qualifying projects of \$5,000,000 or greater new investment).
		Revitalization Planning
		Target Investment Partnerships & Planning (Brownfield, Integrated Capital . . .)
		SEPA Planned Action Building blocks
		Comprehensive Planning Integration with Growth Strategies
		Target Area Development
		Arterial Street Improvements
		Combined Sewer Overflow System Improvements "Cleaner River Faster"
		Utility Improvements (Integrated planning)
		Streetscape/Place Making Improvements
		Economic Development Assistance
		Ombudsman Assistance for Applicants
		Assistance researching and filing for Federal, State and County incentives
		Bundling incentives into a package showing dollar value - Partnership Portfolio
		Creating ROW Improvement agreements



My.SpokaneCity.org
 Planning and Development Services
 808 W Spokane Falls Blvd., 3rd floor
 Spokane, WA 99201
 509.625.6300
incentives@spokanecity.org

Financial Incentive Plan – Projects of Citywide Significance.

In Resolution 2015-0084 Council requested that the Council President bring forward a set of necessary and/or desirable changes to policies or procedures, the Spokane Municipal Code, and other guidance, such as illustrative forms, maps, white papers, background materials, and other documents as needed, for the Council's consideration as it considers a framework for focused, specific, measurable, transparent and impactful business recruitment, retention, and expansion strategies for the City of Spokane, including projects of Citywide significance which includes private investments of \$5 million (five million dollars) and greater.

The following evaluation and scoring process is to be used when considering financial incentives for projects of Citywide significance.

Projects will be evaluated and scored based on the project's merits with regard to the following: incremental revenue generated for the City by increased property tax, sales tax and utility tax dollars added; the overall long-term job generation, both the number of jobs created and number with wages at or 30 percent greater than the average per capita income in Spokane; how well the project implements existing community plans, Comprehensive Plan, design standards and cleans up the environment; advances state and regional industry cluster growth and regional economic development plans; and whether the project is in a core infill development area such as within a Center or Corridor, targeted area.

Below are the evaluation sections and the maximum score possible.

a. Property Based Incremental Revenue	Max Score	30
b. Job Creation	Max Score	60
c. Comp Plan, Design, and the Environment	Max Score	60
d. Industry Cluster Advancements	Max Score	10
e. Geographic Priority Areas	Max Score	<u>10</u>
Total Score Possible		170

Individual projects considered for financial incentives under the Projects of Citywide significance program will be evaluated in accordance with these scoring parameters by a committee formed for such purpose. Committee membership and review process should be provided in an administrative policy to be developed prior to any such recommendation. At a minimum, the membership should include City economic development and finance staff, 2 members of City Council and a member of the community at large with experience and expertise in the field of economic development. Recommendations of the committee on project incentives will be made to the City Council and shall include all evaluation details on each individual project for review along with the incentive agreement on projects, including value of the incentive agreement and any conditions related to the award of the incentive.

Revised - Rec'd 9-10-15

<div> <div>\$</div> <div>Project & Location Plan</div> </div> <div> <div>Project of Citywide Significance</div> <div>Financial Partnership Portfolio Evaluation</div> </div>		Points Possible	Score
Project based Incremental Revenue			
City Property Tax, Sales Tax (Retail and Construction), Utility Taxes, Utility Revenues			
Incremental Revenue:			
1 year total incremental revenue:			
Exceeds \$1 million - 30 points			
Between \$750,000 and \$999,999 - 25 points			
Between \$500,000 and \$749,999 - 20 points			
Between \$250,000 and \$499,999 - 15 points			
Max group score possible		30	
Job Creation			
Number of new jobs			
Greater than 100 - 10 points			
75 to 99 - 8 points			
50 to 74 - 6 points			
25 to 49 - 4 points			
1 to 24 - 2 points			
Living Wage Job creation Multiplier (>1.30xMedian Per Capita Income)			
80% to 100% of new jobs - 6x			
60% to 79% of new jobs - 5x			
40% to 59% of new jobs - 4x			
20% to 39% of new jobs - 3x			
10% to 19% of new jobs - 2x			
Less than 10% of new jobs - 1x			
Max group score possible		60	
Comp Plan, Design and the Environment			
Brownfield redevelopment - 5 points			
Innovative or exemplary site design - 5 points			
Design includes enhanced public amenities - 5 points			
Project includes Neighborhood or Sub-Area improvements - 5 points			
Incorporation of Low Impact Development standards - 5 points			
Incorporation of adopted green building standards - 5 points			
Transit Oriented Development - 5 points			
Mixed Use Development - 5 points			
Mixed Income Development - 5 points			
Historic Preservation - 5 points			
Adaptive reuse - 5 points			
Blight removal - 5 points			
Max group score possible		60	
Industry Cluster Advancement			
Manufacturing - 10 points			
Aerospace/Automation - 10 points			
Technology (Biotech, medical, IT, etc) - 10 points			
Tourism - 10 points			
Max group score possible		10	
Geographic Priority Areas			
Located in a CAC or Downtown - 10 points			
Located in a target investment area - 10 points			
Infill location with existing infrastructure capacity - 10 points			
Max group score possible		10	
TOTAL SCORE POSSIBLE		170	
"Special Considerations" Bonus - 10 points			
[Can be added to total score when warranted in consideration of special public benefit factors not addressed above.]			
Median Per capita income \$24,000 est. \$22.5/hr. (2015)			
130% of median per capita income is \$31,200 annually and approximately \$15/hour			

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TABLE A

UD INFLOW AND OUTFLOW JOB COUNTS

INFLOW/OUTFLOW WORKERS	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
ALL WORKERS										
Employed in the UD	8,903	9,650	8,968	9,289	9,672	9,763	9,625	9,756	9,693	11,573
Employed in the UD but Living Outside	8,838	9,292	8,916	9,240	9,611	9,714	9,561	9,710	9,642	11,518
Living in the UD	695	689	686	726	717	643	738	681	697	796
Living in the UD but Employed Outside	630	631	634	677	656	594	674	635	646	741
Living and Employed in the UD	65	58	52	49	61	49	64	46	51	55
WORKERS AGED 29 OR YOUNGER										
Employed in the UD	2,009	2,147	1,976	2,104	2,287	2,350	2,155	1,977	1,872	2,110
Employed in the UD but Living Outside	1,993	2,130	1,954	2,089	2,268	2,335	2,139	1,964	1,856	2,092
Living in the UD	244	222	235	244	244	236	252	226	222	275
Living in the UD but Employed Outside	228	205	213	229	225	221	236	213	206	257
Living and Employed in the UD	16	17	22	15	19	15	16	13	16	18
WORKERS AGED 30 TO 54										
Employed in the UD	5,546	5,692	5,398	5,465	5,516	5,424	5,355	5,567	5,533	6,513
Employed in the UD but Living Outside	5,509	5,663	5,378	5,442	5,483	5,398	5,322	5,547	5,514	6,491
Employed and Living in the UD	37	29	20	23	33	26	33	20	19	22
Living in the UD	378	379	368	385	374	321	364	350	374	373
Living in the UD but Employed Outside	341	350	348	362	341	295	331	330	355	351
Living and Employed in the UD	37	29	20	23	33	26	33	20	19	22
WORKERS AGED 55 OR OLDER										
Employed in the UD	1,348	1,511	1,594	1,720	1,869	1,989	2,115	2,121	2,288	2,950
Employed in the UD but Living Outside	1,336	1,499	1,584	1,709	1,860	1,981	2,100	2,199	2,272	2,935
Living in the UD	73	88	83	97	99	86	122	105	101	148
Living in the UD but Employed Outside	61	76	73	86	90	78	107	92	85	133
Living and Employed in the UD	12	12	10	11	9	8	15	13	16	15
WORKERS EARNING \$1,250 PER MONTH OR LESS										
Employed in the UD	2,247	2,449	2,292	2,296	2,323	2,350	2,048	2,064	2,195	2,416
Employed in the UD but Living Outside	2,225	2,427	2,266	2,280	2,302	2,331	2,031	2,052	2,176	2,399
Living in the UD	279	263	262	243	243	197	231	202	203	214
Living in the UD but Employed Outside	257	241	236	227	222	178	214	190	184	197
Living and Employed in the UD	22	22	26	16	21	19	17	12	19	17
WORKERS EARNING \$1,250 TO \$3,333 PER MONTH										

TABLE A
UD INFLOW AND OUTFLOW JOB COUNTS

INFLOW/OUTFLOW WORKERS	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Employed in the UD	4,201	4,152	3,874	4,029	4,036	3,813	3,744	3,781	9,428	3,952
Employed in the UD but Living Outside	4,169	4,123	3,854	4,005	4,009	3,795	3,713	3,755	3,409	3,927
Employed and Living in the UD	32	29	20	24	27	18	13	26	19	25
Living in the UD	320	343	335	354	356	318	325	339	325	378
Living in the UD but Employed Outside	288	314	315	330	329	300	306	313	306	353
Living and Employed in the UD	32	29	20	24	27	18	19	26	19	25
WORKERS EARNING MORE THAN \$3,333 PER MONTH										
Employed in the UD	2,455	2,749	2,802	2,964	3,313	3,600	4,070	3,911	4,070	5,205
Employed in the UD but Living Outside	2,444	2,742	2,796	2,955	330	3,588	4,057	3,903	4,057	5,192
Living in the UD	96	83	89	129	118	128	169	140	169	204
Living in the UD but Employed Outside	85	76	83	120	105	116	156	132	156	191
Living and Employed in the UD	11	7	6	9	13	12	13	8	13	13
WORKERS IN THE "GOODS PRODUCING" INDUSTRY CLASS										
Employed in the UD	627	710	706	621	639	541	641	597	449	429
Employed in the UD but Living Outside	624	709	703	619	638	539	638	597	443	428
Living in the UD	84	98	95	90	101	90	102	87	68	84
Living in the UD but Employed Outside	81	97	92	88	100	88	99	87	62	83
Living and Employed in the UD	3	1	3	2	1	2	3	0	6	1
WORKERS IN THE "TRADE, TRANSPORTATION, AND UTILITIES" INDUSTRY CLASS										
Employed in the UD	1,674	1,669	1,239	1,324	1,327	1,199	1,194	1,189	1,236	1,049
Employed in the UD but Living Outside	1,663	1,661	1,234	1,320	1,317	1,196	1,190	1,184	1,231	1,048
Living in the UD	135	146	153	169	152	141	154	144	160	161
Living in the UD but Employed Outside	124	138	148	165	142	138	150	139	155	160
Living and Employed in the UD	11	8	5	4	10	3	4	5	5	1
WORKERS IN THE "ALL OTHER SERVICES" INDUSTRY CLASS										
Employed in the UD	6,602	6,971	7,023	7,344	7,706	8,023	7,790	7,970	8,008	10,095
Employed in the UD but Living Outside	6,551	6,922	6,979	7,301	7,656	7,979	7,733	7,929	7,968	10,042
Living in the UD	476	445	438	467	464	412	482	450	469	551
Living in the UD but Employed Outside	425	396	394	424	414	368	425	409	429	498
Living and Employed in the UD	51	49	44	43	50	44	57	41	40	53

Source: *Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015*

TABLE B CHARACTERISTICS OF JOBS IN THE UNIVERSITY DISTRICT									
WORKER CHARACTERISTICS	2002		2003		2004		2005		2006
	WORKER S	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS
JOB COUNTS BY AGE									
Age 29 or Younger	2,009	22.6%	2,147	23.0%	1,976	22.0%	2,104	22.7%	2,287
Age 30-54	5,546	62.3%	5,692	60.9%	5,398	60.2%	5,465	58.8%	5,516
Age 55 or Older	1,348	15.1%	1,511	16.2%	1,594	17.8%	1,720	18.5%	1,869
JOB COUNTS BY EARNINGS									
\$1,250 Per Month or Less	2,247	25.2%	2,449	26.2%	2,292	25.6%	2,296	24.7%	2,323
\$1,251 to \$3,333 Per Month	4,201	47.2%	4,152	44.4%	3,874	43.2%	4,029	43.4%	4,036
More than \$3,333 Per Month	2,455	27.6%	2,749	29.4%	2,802	31.2%	2,964	31.9%	3,313
JOB COUNTS BY INDUSTRY SEGMENTS									
Agriculture, Forestry, Fishing and Hunting	0	0.0%	2	0.0%	0	0.0%	0	0.0%	1
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Utilities	6	0.1%	0	0.0%	0	0.0%	0	0.0%	0
Construction	311	3.5%	378	4.0%	378	4.2%	299	3.2%	349
Manufacturing	316	3.5%	330	3.5%	328	3.7%	322	3.5%	289
Wholesale Trade	887	10.0%	886	9.5%	540	6.0%	506	5.4%	476
Retail Trade	719	8.1%	711	7.6%	620	6.9%	734	7.9%	769
Transportation and Warehousing	62	0.7%	72	0.8%	79	0.9%	84	0.9%	82
Information	267	3.0%	236	2.5%	231	2.6%	240	2.6%	382
Finance and Insurance	141	1.6%	170	1.8%	157	1.8%	239	2.6%	285
Real Estate and Rental and Leasing	178	2.0%	160	1.7%	167	1.9%	155	1.7%	166
Professional, Scientific, and Technical Services	420	4.7%	400	4.3%	427	4.8%	400	4.3%	580
Management of Companies and Enterprises Administration and Support	68	0.8%	67	0.7%	93	1.0%	91	1.0%	92
Waste Management and Remediation	169	1.9%	173	1.9%	226	2.5%	322	3.5%	291
Educational Services	3,366	37.8%	3,550	38.0%	3,519	39.2%	3,559	38.3%	3,562
Health Care and Social Assistance	810	9.1%	1,000	10.7%	1,014	11.3%	1,059	14.4%	998
Arts, Entertainment, and Recreation	37	0.4%	53	0.6%	32	0.4%	14	0.2%	12
									0.1%

TABLE B

CHARACTERISTICS OF JOBS IN THE UNIVERSITY DISTRICT

WORKER CHARACTERISTICS	2002			2003			2004			2005			2006		
	WORKER S	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS
Accommodation and Food Services	780	8.8%	801	8.6%	791	8.8%	938	10.1%	1,048	10.8%					
Other Services (Excluding Public Administration)	229	2.6%	224	2.4%	232	2.6%	211	2.3%	184	1.9%					
Public Administration	137	1.5%	137	1.5%	134	1.5%	116	1.2%	106	1.1%					
WORKER RACE															
White Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Black or African America Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
American Indian or Alaska Native Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Asian Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Native Hawaiian or Other Pacific Island Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Two or More Race Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATION ATTAINMENT															
Less than High School	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
High School or Equivalent, No College	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Some College or Associate Degree	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Bachelor's Degree or Advanced Degree	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WORK GENDER															
Male	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Female	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL PRIMARY JOBS IN UD	8903	100.0%	9350	100.1%	8968	100.0%	9289	100.0%	9672	100.0%	9672	100.0%	9672	99.9%	99.9%

Source: Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

TABLE B
CHARACTERISTICS OF JOBS IN THE UD AREA

WORKERS	JOB COUNTS BY EARNINGS (PRIMARY JOBS - WORKERS EMPLOYED IN THE UD)						2011					
	2007		2008		2009		2010		2011			
	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE
JOB COUNTS BY AGE												
Age 29 or younger	2,350	24.1%	2,155	22.4%	1,977	20.3%	1,872	19.3%	2,110	18.2%		
Age 30-54	5,424	55.6%	5,355	55.6%	5,567	57.1%	5,533	27.1%	6,513	56.3%		
Age 55 or older	1,989	20.4%	5,115	22.0%	2,212	22.7%	2,288	23.6%	2,950	25.5%		
JOB COUNTS BY EARNINGS (PRIMARY JOBS)												
\$1,250 per month or less	2,350	24.1%	2,048	21.3%	2,064	20.3%	2,195	22.6%	2,416	20.9%		
\$1,251 to \$3,333 per month	3,813	39.1%	3,744	38.9%	5,567	57.1%	3,428	35.4%	3,952	34.1%		
More than \$3,333 per month	3,600	36.9%	3,833	39.8%	2,212	22.7%	4,070	42.0%	5,205	45.0%		
JOB COUNTS BY INDUSTRY SEGMENTS												
Agriculture, Forestry, Fishing and Hunting	0	0.0%	51	0.5%	73	0.7%	1	0.0%	62	0.5%		
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	0	0.0%	49	0.5%	44	0.5%	33	0.3%		
Utilities	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%		
Construction	269	2.8%	317	3.3%	205	2.1%	197	2.0%	140	1.2%		
Manufacturing	272	2.8%	273	2.8%	270	2.8%	207	2.1%	194	1.7%		
Wholesale Trade	452	4.6%	461	4.8%	525	5.4%	557	5.7%	293	2.5%		
Retail Trade	673	6.9%	637	6.6%	557	5.7%	576	5.9%	650	5.6%		
Transportation and Warehousing	74	8.0%	96	1.0%	107	1.1%	103	1.1%	106	0.9%		
Information	375	3.8%	387	4.0%	326	3.3%	323	3.3%	274	2.4%		
Finance and Insurance	298	3.1%	328	3.4%	195	2.0%	243	2.5%	191	1.7%		
Real Estate and Rental and Leasing	153	1.6%	147	1.5%	158	1.6%	140	1.4%	157	1.4%		
Professional, Scientific, and Technical Services	656	6.7%	477	5.0%	559	5.8%	502	5.2%	527	4.6%		
Management of Companies and Enterprises Administration and Support	90	0.9%	81	0.8%	7	0.1%	11	0.1%	23	0.2%		
Waste Management and Remediation	245	2.5%	210	2.2%	187	1.9%	42	1.2%	121	1.0%		
Educational Services	3,723	38.1%	3,628	37.7%	3,873	39.7%	4,072	42.0%	5,886	50.9%		
Health Care and Social Assistance	1,013	10.4%	1,091	11.3%	1,284	13.2%	975	10.1%	1,045	9.0%		

TABLE B
CHARACTERISTICS OF JOBS IN THE UD AREA

Job Counts by Earnings (Primary Jobs - Workers Employed in the UD)										
Workers	2007		2008		2009		2010		2011	
	Workers	Share	Workers	Share	Workers	Share	Workers	Share	Workers	Share
Arts, Entertainment, and Recreation	31	0.3%	37	0.4%	31	0.3%	50	0.1%	36	0.3%
Accommodation and Food Services	1,014	10.4%	1,010	10.5%	901	9.2%	994	10.3%	1,052	9.1%
Other Services (Excluding Public Administration)	257	2.6%	244	2.5%	273	2.8%	241	2.5%	265	2.3%
Public Administration	168	1.7%	150	1.6%	166	1.7%	339	3.5%	518	4.5%
Worker Race										
White Alone	n/a	n/a	n/a	n/a	9,018	92.4%	8,938	92.2%	10,737	92.8%
Black or African America Alone	n/a	n/a	n/a	n/a	195	2.0%	191	2.0%	225	1.9%
American Indian or Alaska Native Alone	n/a	n/a	n/a	n/a	127	1.3%	112	1.2%	126	1.1%
Asian Alone	n/a	n/a	n/a	n/a	247	2.5%	288	3.0%	289	2.5%
Native Hawaiian or Other Pacific Island Alone	n/a	n/a	n/a	n/a	16	0.2%	12	10.0%	8	10.0%
Two or More Race Alone	n/a	n/a	n/a	n/a	153	1.6%	152	1.6%	188	1.6%
Education Attainment										
Less than High School	n/a	n/a	n/a	n/a	486	5.0%	450	4.6%	550	4.8%
High School or Equivalent, No College	n/a	n/a	n/a	n/a	1,959	20.1%	1,928	19.9%	2,269	19.6%
Some College or Associate Degree	n/a	n/a	n/a	n/a	2,657	27.2%	2,615	27.0%	3,191	27.6%
Bachelor's Degree or Advanced Degree	n/a	n/a	n/a	n/a	2,677	27.4%	2,828	29.2%	3,453	29.8%
Work Gender										
Male	n/a	n/a	n/a	n/a	4,380	44.9%	4,183	43.2%	4,738	40.9%
Female	n/a	n/a	n/a	n/a	5,376	55.1%	5,510	56.8%	6,835	59.1%
TOTAL PRIMARY JOBS IN UD	9763	100.1%	12625	100.0%	9756	100.1%	9693	70.0%	11573	100.0%

Source: Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

TABLE C

CHARACTERISTICS OF WORKERS LIVING IN THE UNIVERSITY DISTRICT

WORKER CHARACTERISTICS	2002		2003		2004		2005		2006	
	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE
JOB COUNTS BY AGE										
Age 29 or younger	244	35.1%	222	32.2%	235	34.3%	244	33.6%	244	34.0%
Age 30-54	378	54.4%	379	55.0%	368	53.6%	385	53.0%	374	52.2%
Age 55 or older	73	10.5%	88	12.8%	83	12.1%	97	13.4%	99	13.8%
JOB COUNTS BY EARNINGS (PRIMARY JOBS)										
\$1,250 per month or less	279	40.1%	263	38.2%	262	38.2%	243	33.5%	243	33.9%
\$1,251 to \$3,333 per month	320	46.0%	343	49.8%	335	48.8%	354	48.8%	356	49.7%
More than \$3,333 per month	96	13.8%	83	12.0%	89	13.0%	129	17.8%	118	16.5%
JOB COUNTS BY INDUSTRY SEGMENTS										
Agriculture, Forestry, Fishing and Hunting	4	0.6%	1	0.1%	3	0.4%	4	0.6%	4	0.6%
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Utilities	3	0.4%	6	0.9%	3	0.4%	4	0.6%	7	1.0%
Construction	31	4.5%	33	4.8%	29	4.2%	26	3.6%	34	4.7%
Manufacturing	49	7.1%	64	9.3%	63	9.2%	60	8.3%	63	8.8%
Wholesale Trade	36	5.2%	39	5.7%	35	5.1%	34	4.7%	29	4.0%
Retail Trade	77	11.1%	88	12.8%	93	13.6%	107	14.7%	102	14.2%
Transportation and Warehousing	19	2.7%	13	1.9%	22	3.2%	24	3.3%	14	2.0%
Information	11	1.6%	13	1.9%	14	2.0%	15	2.1%	11	1.5%
Finance and Insurance	37	5.3%	31	4.5%	29	4.2%	35	4.8%	34	4.7%
Real Estate and Rental and Leasing	19	2.7%	12	1.7%	15	2.2%	13	1.8%	11	1.5%
Professional, Scientific, and Technical Services	36	5.2%	20	2.9%	27	3.9%	25	3.4%	24	3.3%
Management of Companies and Enterprises	7	1.0%	8	1.2%	16	2.3%	9	1.2%	9	1.3%
Administration and Support										
Waste Management and Remediation	50	7.2%	34	4.9%	40	5.8%	61	8.4%	64	8.9%
Educational Services	61	8.8%	61	8.9%	50	7.3%	54	7.4%	53	7.4%

TABLE C

CHARACTERISTICS OF WORKERS LIVING IN THE UNIVERSITY DISTRICT

WORKER CHARACTERISTICS	2002			2003			2004			2005			2006		
	WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE	
Health Care and Social Assistance	95	13.7%		115	16.7%		86	12.5%		91	12.5%		97	13.5%	
Arts, Entertainment, and Recreation	9	1.3%		15	2.2%		16	2.3%		14	1.9%		21	2.9%	
Accommodation and Food Services	81	11.7%		62	9.0%		71	10.3%		78	10.7%		81	11.3%	
Other Services (Excluding Public Administration)	37	5.3%		48	7.0%		42	6.1%		30	4.1%		31	4.3%	
Public Administration	33	4.7%		26	3.8%		32	4.7%		42	5.8%		28	3.9%	
WORKER RACE															
White Alone	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
Black or African America Alone	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
American Indian or Alaska Native Alone	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
Asian Alone	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
Native Hawaiian or Other Pacific Island Alone	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
Two or More Race Alone	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
EDUCATION ATTAINMENT															
Less than High School	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
High School or Equivalent, No College	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
Some College or Associate Degree	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
Bachelor's Degree or Advanced Degree	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
WORK GENDER															
Male	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
Female	n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a		n/a	n/a	
TOTAL PRIMARY JOBS IN UD	695	100.0%		689	100.0%		686	100.0%		726	100.0%		717	100.0%	

TABLE C

CHARACTERISTICS OF WORKERS LIVING IN THE UD AREA

	2007			2008			2009			2010			2011		
	WORKERS	SHARE	WORK	SHARE	WORK	SHARE	WORK	SHARE	WORK	SHARE	WORK	SHARE	WORK	SHARE	
JOB COUNTS BY AGE															
Age 29 or younger	236	36.7%	252	34.1%	226	33.2%	222	31.9%			275	34.5%			
Age 30-54	321	49.9%	364	49.3%	350	51.4%	374	53.7%			373	46.9%			
Age 55 or older	86	13.4%	122	16.5%	105	15.4%	101	14.5%			148	18.6%			
JOB COUNTS BY EARNINGS (PRIMARY JOBS)															
\$1,250 per month or less	197	30.6%	231	31.3%	202	29.7%	203	29.1%			214	26.9%			
\$1,251 to \$3,333 per month	318	49.5%	346	46.9%	339	49.8%	325	46.6%			378	47.5%			
More than \$3,333 per month	128	19.9%	161	21.8%	140	20.6%	169	24.2%			204	25.6%			
JOB COUNTS BY INDUSTRY SEGMENTS															
Agriculture, Forestry, Fishing and Hunting	9	1.4%	3	0.4%	4	0.6%	6	0.9%			3	0.4%			
Mining, Quarrying, and Oil and Gas Extraction	2	0.3%	1	0.1%	0	0.0%	0	0.0%			0	0.0%			
Utilities	3	0.5%	4	0.5%	2	0.3%	2	0.3%			3	0.4%			
Construction	30	4.7%	43	5.8%	35	5.1%	27	3.9%			26	3.3%			
Manufacturing	49	7.6%	55	7.5%	48	7.0%	35	5.0%			55	6.9%			
Wholesale Trade	31	4.8%	30	4.1%	36	5.3%	41	5.9%			32	4.0%			
Retail Trade	91	14.2%	94	12.7%	82	12.0%	92	13.2%			102	12.8%			
Transportation and Warehousing	16	2.5%	26	3.5%	24	3.5%	25	3.6%			24	3.0%			
Information	13	2.0%	13	1.8%	10	1.5%	21	3.0%			19	2.4%			
Finance and Insurance	39	6.1%	35	4.7%	41	6.0%	28	4.0%			36	4.5%			
Real Estate and Rental and Leasing	10	1.6%	13	1.8%	4	0.6%	6	0.9%			9	1.1%			
Professional, Scientific, and Technical Services	37	5.8%	34	4.6%	36	5.3%	42	6.0%			40	5.0%			
Management of Companies and Enterprises	7	1.1%	8	1.1%	7	1.0%	4	0.6%			17	2.1%			
Administration and Support															
Waste Management and Remediation	50	7.8%	50	6.8%	39	5.7%	37	5.3%			48	6.0%			
Educational Services	46	7.2%	63	8.5%	55	8.1%	49	7.0%			69	8.7%			
Health Care and Social Assistance	78	12.1%	106	14.4%	113	16.6%	106	15.2%			127	16.0%			

TABLE C

CHARACTERISTICS OF WORKERS LIVING IN THE UD AREA

	2007			2008			2009			2010			2011		
	WORKERS	SHARE	WORK	SHARE	WORK	SHARE	WORK	SHARE	WORK	SHARE	WORK	SHARE	WORK	SHARE	WORK
Arts, Entertainment, and Recreation	12	1.9%		17	2.3%		17	2.5%		12	1.7%		14	1.8%	
Accommodation and Food Services	65	10.1%		82	11.1%		67	9.8%		88	12.6%		96	12.1%	
Other Services (Excluding Public Administration)	26	4.0%		32	4.3%		35	5.1%		42	6.0%		36	4.5%	
Public Administration	29	4.5%		29	3.9%		26	3.8%		34	4.9%		40	5.0%	
WORKER RACE															
White Alone	n/a	n/a	n/a	n/a	n/a		602	88.4%		626	89.8%		680	85.4%	
Black or African America Alone	n/a	n/a	n/a	n/a	n/a		20	2.9%		18	2.6%		28	3.5%	
American Indian or Alaska Native Alone	n/a	n/a	n/a	n/a	n/a		10	1.5%		10	1.4%		12	1.5%	
Asian Alone	n/a	n/a	n/a	n/a	n/a		38	5.6%		27	3.9%		53	6.7%	
Native Hawaiian or Other Pacific Island Alone	n/a	n/a	n/a	n/a	n/a		0	0.0%		2	0.3%		1	0.1%	
Two or More Race Alone	n/a	n/a	n/a	n/a	n/a		11	1.6%		14	2.0%		22	2.8%	
EDUCATION ATTAINMENT															
Less than High School	n/a	n/a	n/a	n/a	n/a		40	8.8%		49	10.3%		62	11.9%	
High School or Equivalent, No College	n/a	n/a	n/a	n/a	n/a		171	41.2%		138	32.3%		171	37.2%	
Some College or Associate Degree	n/a	n/a	n/a	n/a	n/a		150	26.8%		170	26.7%		182	25.6%	
Bachelor's Degree or Advanced Degree	n/a	n/a	n/a	n/a	n/a		94	12.1%		118	14.5%		106	11.7%	
WORK GENDER															
Male	n/a	n/a	n/a	n/a	n/a		316	46.4%		349	50.1%		422	53.0%	
Female	n/a	n/a	n/a	n/a	n/a		365	53.6%		348	49.9%		374	47.0%	
TOTAL PRIMARY JOBS IN UD	643	100.0%		738	100.0%		681	100.0%		697	100.0%		796	100.0%	

Source: Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

TABLE D

WORKERS LIVING IN UD BUT WORKING ELSEWHERE IN THE CITY OF SPOKANE

WORKER CHARACTERISTICS	2002			2003			2004			2005			2006		
	WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE	
JOB COUNTS BY AGE															
Age 29 or Younger	157	34.1%		142	32.9%		132	31.7%		142	34.1%		135	31.8%	
Age 30-54	249	54.1%		230	53.4%		226	54.3%		214	51.3%		221	52.1%	
Age 55 or Older	54	11.8%		59	13.7%		58	13.9%		61	14.6%		68	16.0%	
WORKERS LIVING IN UD	460	100.0%		431	100.0%		416	99.9%		417	100.0%		424	99.9%	
JOB COUNTS BY EARNINGS (PRIMARY JOBS)															
\$1,250 Per Month or Less	200	43.5%		175	40.6%		176	42.3%		161	38.6%		154	36.3%	
\$1,251 to \$3,333 Per Month	207	45.0%		214	49.7%		192	46.2%		200	48.0%		205	48.3%	
More than \$3,333 Per month	53	11.5%		42	9.7%		48	11.5%		56	13.4%		65	15.3%	
WORKERS LIVING IN UD	460	100.0%		431	100.0%		416	100.0%		417	100.0%		424	99.9%	
JOB COUNTS BY INDUSTRY SEGMENTS															
Goods Producing	38	8.3%		41	9.5%		39	9.4%		30	7.2%		33	7.8%	
Trade, Transportation, and Utilities	71	15.4%		83	19.3%		73	17.5%		78	18.7%		73	17.2%	
All Other Services	351	76.3%		307	71.2%		304	73.1%		309	74.1%		318	75.0%	
WORKERS LIVING IN UD	460	100.0%		431	100.0%		416	100.0%		417	100.0%		424	100.0%	

TABLE D

WORKERS LIVING IN UD BUT WORKING ELSEWHERE IN THE CITY OF SPOKANE

WORKERS	2007			2008			2009			2010			2011		
	WORK CHARAC- TERISTICS	SHARE	WORK CHARAC- TERISTICS	WORK CHARAC- TERISTICS	SHARE	WORK CHARAC- TERISTICS	WORK CHARAC- TERISTICS	SHARE	WORK CHARAC- TERISTICS	WORK CHARAC- TERISTICS	SHARE	WORK CHARAC- TERISTICS	WORK CHARAC- TERISTICS	SHARE	WORK CHARAC- TERISTICS
JOB COUNTS BY AGE															
Age 29 or Younger	117	34.9%	143	34.5%	121	32.7%	131	36.6%	160	37.2%					
Age 30-54	191	51.0%	211	51.0%	187	50.5%	168	46.9%	184	42.8%					
Age 55 or Older	47	14.0%	60	14.5%	62	16.8%	59	16.5%	86	20.0%					
WORKERS LIVING IN UD	355	99.9%	414	100.0%	370	100.0%	358	100.0%	430	100.0%					
JOB COUNTS BY EARNINGS (PRIMARY JOBS)															
\$1,250 per Month or Less	112	33.4%	138	33.3%	113	30.5%	121	33.8%	118	27.4%					
\$1,251 to \$3,333 Per Month	153	45.7%	207	50.0%	191	51.6%	167	46.6%	210	48.8%					
More than \$3,333 Per Month	70	20.9%	69	16.7%	66	17.8%	70	19.6%	102	23.7%					
WORKERS LIVING IN UD	335	100.0%	414	100.0%	370	99.9%	358	100.0%	430	99.9%					
JOB COUNTS BY INDUSTRY SEGMENTS															
Goods Producing	36	10.7%	34	8.2%	33	8.9%	24	6.7%	23	5.3%					
Trade, Transportation, and Utilities	55	16.4%	68	16.4%	58	15.7%	56	15.6%	67	15.6%					
All Other Services	244	72.8%	312	75.4%	279	75.4%	278	77.7%	340	79.1%					
WORKERS LIVING IN UD	335	99.9%	414	100.0%	370	100.0%	358	100.0%	430	100.0%					

Source: Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

TABLE E WORKERS EMPLOYED IN THE UD AND LIVING ELSEWHERE IN THE CITY OF SPOKANE									
	2002			2003			2004		
	WORK CHARAC- TERISTICS	SHARE	WORK CHARAC- TERISTICS	WORK CHARAC- TERISTICS	SHARE	WORK CHARAC- TERISTICS	WORK CHARAC- TERISTICS	SHARE	2006
JOB COUNTS BY AGE (PRIMARY JOBS)									
Age 29 or Younger	1,078	23.7%	1,186	24.7%	1,057	23.3%	1,138	25.1%	1,272
Age 30-54	2,771	60.9%	2,855	59.5%	2,674	58.9%	2,562	56.6%	2,616
Age 55 or Older	703	15.4%	758	15.8%	806	17.8%	830	18.3%	900
UD EMPLOYEES LIVING IN CITY OF SPOKANE	4,552	100.0%	4,799	100.0%	4,537	100.0%	4,530	100.0%	4,788
									100.0%
JOB COUNTS BY EARNINGS (PRIMARY JOBS)									
\$1,250 Per Month or Less	1,276	28.0%	1,388	28.9%	1,347	29.7%	1,258	27.8%	1,348
\$1,251 to \$3,333 Per Month	2,245	49.3%	2,258	47.1%	2,007	44.2%	2,100	46.4%	2,088
More than \$3,333 Per Month	1,031	22.6%	1,153	24.0%	1,183	26.1%	1,172	25.9%	1,352
UD EMPLOYEES LIVING IN CITY OF SPOKANE	4,552	99.9%	4,799	100.0%	4,537	100.0%	4,530	100.1%	4,788
									100.0%
JOB COUNTS BY INDUSTRY SEGMENTS									
Goods Producing	313	6.9%	330	6.9%	320	7.1%	280	6.2%	277
Trade, Transportation, and Utilities	761	16.7%	807	16.8%	612	13.5%	626	13.8%	645
All Other Services	3,478	76.4%	3,662	76.3%	3,605	79.5%	3,624	80.0%	3,866
UD EMPLOYEES LIVING IN CITY OF SPOKANE	4,552	100.0%	4,799	100.0%	4,537	100.1%	4,530	100.0%	4,788
									100.0%

TABLE E

WORKERS EMPLOYED IN THE UD AND LIVING ELSEWHERE IN THE CITY OF SPOKANE

		2007		2008		2009		2010		2011	
		WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE
JOB COUNTS BY AGE (PRIMARY JOBS)											
Age 29 or Younger		1,153	25.3%	1,085	23.9%	1,001	21.1%	830	19.0%	1,025	18.1%
Age 30-54		2,478	54.5%	2,451	54.0%	2,655	56.0%	2,492	57.0%	3,164	55.8%
Age 55 or Older		919	20.2%	1,007	22.2%	1,085	22.9%	1,049	24.0%	1,482	26.1%
UD EMPLOYEES LIVING IN CITY OF SPOKANE		4,550	100.0%	4,543	100.1%	4,741	100.0%	4,371	100.0%	5,671	100.0%
JOB COUNTS BY EARNINGS (PRIMARY JOBS)											
\$1,250 Per Month or Less		1,173	25.8%	1,071	23.6%	1,095	23.1%	1,002	22.9%	1,254	22.1%
\$1,251 to \$3,333 Per Month		1,928	42.4%	1,892	41.6%	1,981	41.8%	1,666	38.1%	1,980	34.9%
More than \$3,333 Per Month		1,449	31.8%	1,580	34.8%	1,665	35.1%	1,703	39.0%	2,437	43.0%
UD EMPLOYEES LIVING IN CITY OF SPOKANE		4,550	100.0%	4,543	100.0%	4,741	100.0%	4,371	100.0%	5,671	100.0%
JOB COUNTS BY INDUSTRY SEGMENTS											
Goods Producing		233	5.1%	282	6.2%	25	5.3%	172	3.9%	152	2.7%
Trade, Transportation, and Utilities		540	11.9%	525	11.6%	540	11.4%	473	10.8%	388	6.8%
All Other Services		3,777	83.0%	3,936	82.2%	3,951	83.3%	3,726	85.2%	5,131	90.5%
UD EMPLOYEES LIVING IN CITY OF SPOKANE		4,550	100.0%	4,743	100.0%	4,516	100.0%	4,371	99.9%	5,671	100.0%

Source: Onthemap.ces.census.gov, 2002-2011 LEHD, ADE, Inc. 2015

TABLE F
CHARACTERISTICS OF JOBS IN DOWNTOWN/BID AREA

WORKERS	2002		2003		2004		2005		2006		2007	
	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE
	JOB COUNTY BY AGE OF WORKER											
Age 29 or younger	3,420	29.3%	3,396	29.2%	3,351	28.8%	2,957	26.6%	2,956	26.6%	3,033	27.3%
Age 30-54	6,678	57.2%	6,508	56.0%	6,467	55.7%	6,295	56.7%	6,198	55.7%	6,106	55.0%
Age 55 or older	1,579	13.5%	1,708	14.7%	1,802	15.5%	1,854	16.7%	1,966	17.7%	1,971	17.7%
JOB COUNTS BY EARNINGS (PRIMARY JOBS)												
\$1,250 per month or less	3,520	30.1%	3,431	29.5%	3,249	28.0%	2,739	24.7%	2,700	24.3%	2,391	21.5%
\$1,251 to \$3,333 per month	4,786	41.0%	4,525	39.0%	4,588	39.5%	4,542	40.9%	4,435	39.9%	4,327	38.9%
More than \$3,333 per month	3,371	28.9%	3,656	31.5%	3,783	32.6%	3,825	34.4%	3,985	35.8%	4,392	39.5%
JOB COUNTS BY INDUSTRY SEGMENTS												
Agriculture, Forestry, Fishing and Hunting	0	0.0%	2	0.0%	1	0.0%	2	0.0%	0	0.0%	3	0.0%
Mining, Quarrying, and Oil and Gas Extraction	7	0.1%	6	0.1%	5	0.0%	3	0.0%	1	0.0%	1	0.0%
Utilities	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Construction	21	0.2%	85	0.7%	88	0.8%	96	0.9%	25	0.2%	149	1.3%
Manufacturing	10	0.1%	12	0.1%	11	0.1%	6	0.1%	26	0.2%	20	0.2%
Wholesale Trade	680	5.8%	661	5.7%	565	4.9%	549	4.9%	553	5.0%	227	2.0%
Retail Trade	1,153	9.9%	1,200	10.3%	1,341	11.5%	1,201	10.8%	1,013	9.1%	1,089	9.8%
Transportation and Warehousing	4	0.0%	4	0.0%	5	0.0%	2	0.0%	7	0.1%	9	0.1%
Information	151	1.3%	97	0.8%	104	0.9%	119	1.1%	130	1.2%	106	1.0%
Finance and Insurance	1,439	12.3%	1,471	12.7%	1,642	14.1%	1,507	13.6%	1,563	14.1%	1,508	13.6%
Real Estate and Rental and Leasing	145	1.2%	115	1.0%	119	1.0%	129	1.2%	144	1.3%	200	1.8%
Professional, Scientific, and Technical Services	658	5.6%	641	5.5%	661	5.7%	620	5.6%	673	6.1%	734	6.6%
Management of Companies and Enterprises Administration and Support	251	2.1%	224	1.9%	247	2.1%	268	2.4%	344	3.1%	367	3.3%
Waste Management and Remediation	695	6.0%	643	5.5%	731	6.3%	353	3.2%	325	2.9%	306	2.8%
Educational Services	4,257	36.5%	4,322	37.2%	4,183	36.0%	4,093	36.9%	4,042	36.3%	4,027	36.2%
Health Care and Social Assistance	37	0.3%	33	0.3%	26	0.2%	29	0.3%	86	0.8%	48	0.4%
Arts, Entertainment, and Recreation	25	0.2%	84	0.7%	75	0.6%	92	0.8%	118	1.1%	105	0.9%
Accommodation and Food Services	1,738	14.9%	1,626	14.0%	1,413	12.2%	1,601	14.4%	1,688	15.2%	1,790	16.1%
Other Services (Excluding Public Administration)	364	3.1%	345	3.0%	356	3.1%	399	3.6%	343	3.1%	372	3.3%
Public Administration	41	0.4%	41	0.4%	47	0.4%	37	0.3%	39	0.4%	49	0.4%
WORKER RACE												

TABLE F
CHARACTERISTICS OF JOBS IN DOWNTOWN/BID AREA

WORKERS	2002		2003		2004		2005		2006		2007	
	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE
White Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Black or African America Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
American Indian or Alaska Native Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Asian Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Native Hawaiian or Other Pacific Island Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Two or More Race Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATION ATTAINMENT												
Less than High School	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
High School or Equivalent, No College	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Some College or Associate Degree	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Bachelor's Degree or Advanced Degree	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WORK GENDER												
Male	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Female	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL PRIMARY JOBS IN THE DOWNTOWN/BID	11,677	100.0%	11,612	100.0%	11,620	100.0%	11,106	100.0%	11,120	100.0%	11,110	100.0%

Source: LEHD

TABLE F
CHARACTERISTICS OF JOBS IN DOWNTOWN/BID AREA

WORKERS	2008		2009		2010		2011		2012		2013	
	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE
JOB COUNTY BY AGE OF WORKER												
Age 29 or younger	3,135	27.6%	2,740	24.7%	2,970	25.7%	3,234	26.5%	2,441	22.3%	2,690	23.3%
Age 30-54	6,120	53.9%	6,188	55.8%	6,286	54.4%	6,467	53.1%	6,060	55.3%	6,290	54.5%
Age 55 or older	2,101	18.5%	2,152	19.4%	2,302	19.9%	2,487	20.4%	2,463	22.5%	2,571	22.3%
JOB COUNTS BY EARNINGS (PRIMARY JOBS)												
\$1,250 per month or less	2,295	20.2%	2,255	20.4%	2,531	21.9%	2,752	22.6%	2,155	19.7%	2,387	20.7%
\$1,251 to \$3,333 per month	4,396	38.7%	4,097	37.0%	4,296	37.2%	4,666	38.3%	4,087	37.3%	4,115	35.6%
More than \$3,333 per month	4,665	41.1%	4,728	42.7%	4,731	40.9%	4,770	39.1%	4,722	43.1%	5,049	43.7%
JOB COUNTS BY INDUSTRY SEGMENTS												
Agriculture, Forestry, Fishing and Hunting	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Mining, Quarrying, and Oil and Gas Extraction	4	0.0%	0	0.0%	0	0.0%	0	0.0%	18	0.2%	16	0.1%
Utilities	0	0.0%	1	0.0%	0	0.0%	3	0.0%	0	0.0%	0	0.0%
Construction	184	1.6%	208	1.9%	148	1.3%	63	0.5%	79	0.7%	70	0.6%
Manufacturing	18	0.2%	14	0.1%	12	0.1%	23	0.2%	22	0.2%	19	0.2%
Wholesale Trade	241	2.1%	248	2.2%	247	2.1%	544	4.5%	300	2.7%	317	2.7%
Retail Trade	1,078	9.5%	999	9.0%	1,114	9.6%	1,143	9.4%	814	7.4%	1,015	8.8%
Transportation and Warehousing	4	0.0%	7	0.1%	0	0.0%	0	0.0%	4	0.0%	9	0.1%
Information	64	0.6%	98	0.9%	246	2.1%	169	1.4%	137	1.2%	175	1.5%
Finance and Insurance	1,538	13.5%	1,305	11.8%	1,197	10.4%	1,218	10.0%	1,115	10.2%	1,135	9.8%
Real Estate and Rental and Leasing	190	1.7%	205	1.9%	236	2.0%	227	1.9%	218	2.0%	178	1.5%
Professional, Scientific, and Technical Services	897	7.9%	971	8.8%	1,130	9.8%	1,489	12.2%	1,258	11.5%	1,396	12.1%
Management of Companies and Enterprises Administration and Support	371	3.3%	390	3.5%	529	4.6%	697	5.7%	543	5.0%	545	4.7%
Waste Management and Remediation	281	2.5%	401	3.6%	291	2.5%	356	2.9%	409	3.7%	534	4.6%
Educational Services	3,906	34.4%	4,000	36.1%	4,010	34.7%	3,975	32.6%	3,906	35.6%	3,976	34.4%
Health Care and Social Assistance	50	0.4%	9	0.1%	13	0.1%	15	0.1%	49	0.4%	39	0.3%
Arts, Entertainment, and Recreation	114	1.0%	136	1.2%	106	0.9%	105	0.9%	113	1.0%	129	1.1%
Accommodation and Food Services	2,030	17.9%	1,802	16.3%	1,861	16.1%	1,830	15.0%	1,628	14.8%	1,608	13.9%
Other Services (Excluding Public Administration)	338	3.0%	222	2.0%	162	1.4%	139	1.1%	165	1.5%	194	1.7%
Public Administration	48	0.4%	64	0.6%	256	2.2%	192	1.6%	186	1.7%	196	1.7%

TABLE F
CHARACTERISTICS OF JOBS IN DOWNTOWN/BID AREA

WORKERS	2008			2009			2010			2011			2012			2013		
	WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE		WORKERS	SHARE	
WORKER RACE																		
White Alone	n/a	n/a		10,220	92.2%		10,625	91.9%		11,135	91.4%		10,088	92.0%		10,574	91.5%	
Black or African America Alone	n/a	n/a		259	2.3%		288	2.5%		318	2.6%		279	2.5%		287	2.5%	
American Indian or Alaska Native Alone	n/a	n/a		107	1.0%		101	0.9%		116	1.0%		104	0.9%		120	1.0%	
Asian Alone	n/a	n/a		317	2.9%		328	2.8%		372	3.1%		268	2.4%		315	2.7%	
Native Hawaiian or Other Pacific Island Alone	n/a	n/a		11	0.1%		12	0.1%		26	0.2%		17	0.2%		19	0.2%	
Two or More Race Alone	n/a	n/a		166	1.5%		204	1.8%		221	1.8%		208	1.9%		236	2.0%	
EDUCATION ATTAINMENT																		
Less than High School	n/a	n/a		424	3.8%		501	4.3%		573	4.7%		514	4.7%		632	5.5%	
High School or Equivalent, No College	n/a	n/a		1,941	17.5%		1,977	17.1%		2,215	18.2%		2,154	19.6%		2,142	18.5%	
Some College or Associate Degree	n/a	n/a		2,775	25.0%		2,822	24.4%		2,982	24.5%		2,769	25.3%		2,910	25.2%	
Bachelor's Degree or Advanced Degree	n/a	n/a		3,200	28.9%		3,288	28.4%		3,184	26.1%		3,086	28.1%		3,177	27.5%	
WORK GENDER																		
Male	n/a	n/a		4,306	38.9%		4,587	39.7%		4,814	39.5%		4,476	40.8%		4,722	40.9%	
Female	n/a	n/a		6,774	61.1%		6,971	60.3%		7,374	60.5%		6,488	59.2%		6,829	59.1%	
TOTAL PRIMARY JOBS IN THE DOWNTOWN/BID	11,356	100.0%		11,080	100.0%		11,558	100.0%		12,188	100.0%		10,964	100.0%		11,551	100.0%	

Source: LEHD

TABLE G

CHARACTERISTICS OF WORKERS LIVING IN THE DOWNTOWN/BID AREA BUT EMPLOYED ELSEWHERE

JOB COUNTS BY EARNINGS (PRIMARY JOBS - WORKERS LIVING IN THE UNIVERSITY DISTRICT AND EMPLOYED ELSEWHERE)																
WORKERS		2002		2003		2004		2005		2006		2007				
	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE	WORKERS	SHARE		
WORKERS BY AGE																
Age 29 or younger	25	27.5%	32	31.7%	25	24.3%	21	21.9%	33	33.3%	23	31.5%				
Age 30-54	56	61.5%	59	58.4%	59	57.3%	50	52.1%	49	49.5%	33	45.2%				
Age 55 or older	10	11.0%	10	9.9%	19	18.4%	25	26.0%	17	17.2%	17	23.3%				
WORKERS BY EARNINGS																
\$1,250 per month or less	44	48.4%	38	37.6%	48	46.6%	26	27.1%	34	34.3%	26	35.6%				
\$1,251 to \$3,333 per month	33	36.3%	49	48.5%	35	34.0%	51	53.1%	42	42.4%	31	42.5%				
More than \$3,333 per month	14	15.4%	14	13.9%	20	19.4%	19	19.8%	23	23.2%	16	21.9%				
WORKERS BY INDUSTRY SEGMENTS																
Agriculture, Forestry, Fishing and Hunting	2	2.2%	1	1.0%	2	1.9%	0	0.0%	0	0.0%	3	4.1%				
Mining, Quarrying, and Oil and Gas Extraction	1	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%				
Utilities	0	0.0%	1	1.0%	1	1.0%	0	0.0%	0	0.0%	0	0.0%				
Construction	3	3.3%	5	5.0%	2	1.9%	2	2.1%	8	8.1%	1	1.4%				
Manufacturing	7	7.7%	6	5.9%	5	4.9%	11	11.5%	11	11.1%	7	9.6%				
Wholesale Trade	6	6.6%	3	3.0%	2	1.9%	7	7.3%	4	4.0%	2	2.7%				
Retail Trade	12	13.2%	11	10.9%	11	10.7%	9	9.4%	9	9.1%	8	11.0%				
Transportation and Warehousing	3	3.3%	0	0.0%	1	1.0%	1	1.0%	3	3.0%	2	2.7%				
Information	0	0.0%	1	1.0%	5	4.9%	4	4.2%	2	2.0%	2	2.7%				
Finance and Insurance	9	9.9%	9	8.9%	5	4.9%	5	5.2%	7	7.1%	2	2.7%				
Real Estate and Rental and Leasing	1	1.1%	2	2.0%	1	1.0%	2	2.1%	1	1.0%	1	1.4%				
Professional, Scientific, and Technical Services	2	2.2%	4	4.0%	4	3.9%	4	4.2%	9	9.1%	1	1.4%				
Management of Companies and Enterprises Administration and Support	1	1.1%	1	1.0%	1	1.0%	3	3.1%	0	0.0%	1	1.4%				
Waste Management and Remediation	4	4.4%	3	3.0%	7	6.8%	5	5.2%	12	12.1%	6	8.2%				
Educational Services	15	16.5%	10	9.9%	5	4.9%	11	11.5%	7	7.1%	6	8.2%				
Health Care and Social Assistance	7	7.7%	21	20.8%	14	13.6%	12	12.5%	12	12.1%	10	13.7%				
Arts, Entertainment, and Recreation	1	1.1%	4	4.0%	2	1.9%	5	5.2%	0	0.0%	3	4.1%				
Accommodation and Food Services	12	13.2%	11	10.9%	14	13.6%	10	10.4%	7	7.1%	5	6.8%				
Other Services (Excluding Public Administration)	1	1.1%	4	4.0%	13	12.6%	3	3.1%	1	1.0%	4	5.5%				

TABLE G

CHARACTERISTICS OF WORKERS LIVING IN THE DOWNTOWN/BID AREA BUT EMPLOYED ELSEWHERE

JOB COUNTS BY EARNINGS (PRIMARY JOBS - WORKERS LIVING IN THE UNIVERSITY DISTRICT AND EMPLOYED ELSEWHERE)										
Public Administration	4	4.4%	4	4.0%	8	7.8%	2	2.1%	6	6.1%
WORKERS BY RACE										
White Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Black or African America Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
American Indian or Alaska Native Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Asian Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Native Hawaiian or Other Pacific Island Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Two or More Race Alone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATIONAL ATTAINMENT OF WORKERS										
Less than High School	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
High School or Equivalent, No College	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Some College or Associate Degree	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Bachelor's Degree or Advanced Degree	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
WORKER GENDER										
Male	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Female	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL WORKERS LIVING IN DOWNTOWN/BID	91	100.0%	101	100.0%	103	100.0%	96	100.0%	99	100.0%
									73	100.0%

Source: LEHD

TABLE G

CHARACTERISTICS OF WORKERS LIVING IN THE DOWNTOWN/BID AREA BUT EMPLOYED ELSEWHERE

Job Counts by Earnings (Primary Jobs - Workers Living in the University District and Employed Elsewhere)												
Workers		2008		2009		2010		2011		2012		2013
	Workers	Share	Workers	Share	Workers	Share	Workers	Share	Workers	Share	Workers	Share
Workers by Age												
Age 29 or younger	29	26.1%	30	44.8%	29	34.1%	36	36.0%	33	31.4%	32	29.4%
Age 30-54	63	56.8%	26	38.8%	43	50.6%	44	44.0%	55	52.4%	56	51.4%
Age 55 or older	19	17.1%	11	16.4%	13	15.3%	20	20.0%	17	16.2%	21	19.3%
Workers by Earnings												
\$1,250 per month or less	35	31.5%	21	31.3%	26	30.6%	24	24.0%	27	25.7%	21	19.3%
\$1,251 to \$3,333 per month	48	43.2%	32	47.8%	36	42.4%	46	46.0%	56	53.3%	49	45.0%
More than \$3,333 per month	28	25.2%	14	20.9%	23	27.1%	30	30.0%	22	21.0%	39	35.8%
Workers by Industry Segments												
Agriculture, Forestry, Fishing and Hunting	1	0.9%	2	3.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Utilities	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.9%
Construction	5	4.5%	0	0.0%	4	4.7%	5	5.0%	3	2.9%	3	2.8%
Manufacturing	7	6.3%	5	7.5%	3	3.5%	8	8.0%	10	9.5%	11	10.1%
Wholesale Trade	10	9.0%	4	6.0%	2	2.4%	0	0.0%	4	3.8%	2	1.8%
Retail Trade	9	8.1%	4	6.0%	11	12.9%	10	10.0%	11	10.5%	6	5.5%
Transportation and Warehousing	2	1.8%	0	0.0%	1	1.2%	1	1.0%	2	1.9%	1	0.9%
Information	1	0.9%	2	3.0%	7	8.2%	2	2.0%	0	0.0%	1	0.9%
Finance and Insurance	8	7.2%	4	6.0%	5	5.9%	8	8.0%	5	4.8%	9	8.3%
Real Estate and Rental and Leasing	0	0.0%	1	1.5%	3	3.5%	2	2.0%	2	1.9%	1	0.9%
Professional, Scientific, and Technical Services	4	3.6%	12	17.9%	8	9.4%	5	5.0%	7	6.7%	8	7.3%
Management of Companies and Enterprises Administration and Support	1	0.9%	1	1.5%	3	3.5%	3	3.0%	3	2.9%	4	3.7%
Waste Management and Remediation	8	7.2%	3	4.5%	3	3.5%	5	5.0%	14	13.3%	13	11.9%
Educational Services	9	8.1%	5	7.5%	8	9.4%	10	10.0%	5	4.8%	5	4.6%
Health Care and Social Assistance	14	12.6%	8	11.9%	11	12.9%	16	16.0%	14	13.3%	17	15.6%
Arts, Entertainment, and Recreation	2	1.8%	1	1.5%	1	1.2%	2	2.0%	1	1.0%	4	3.7%
Accommodation and Food Services	16	14.4%	12	17.9%	10	11.8%	7	7.0%	17	16.2%	12	11.0%
Other Services (Excluding Public Administration)	8	7.2%	1	1.5%	4	4.7%	4	4.0%	2	1.9%	8	7.3%

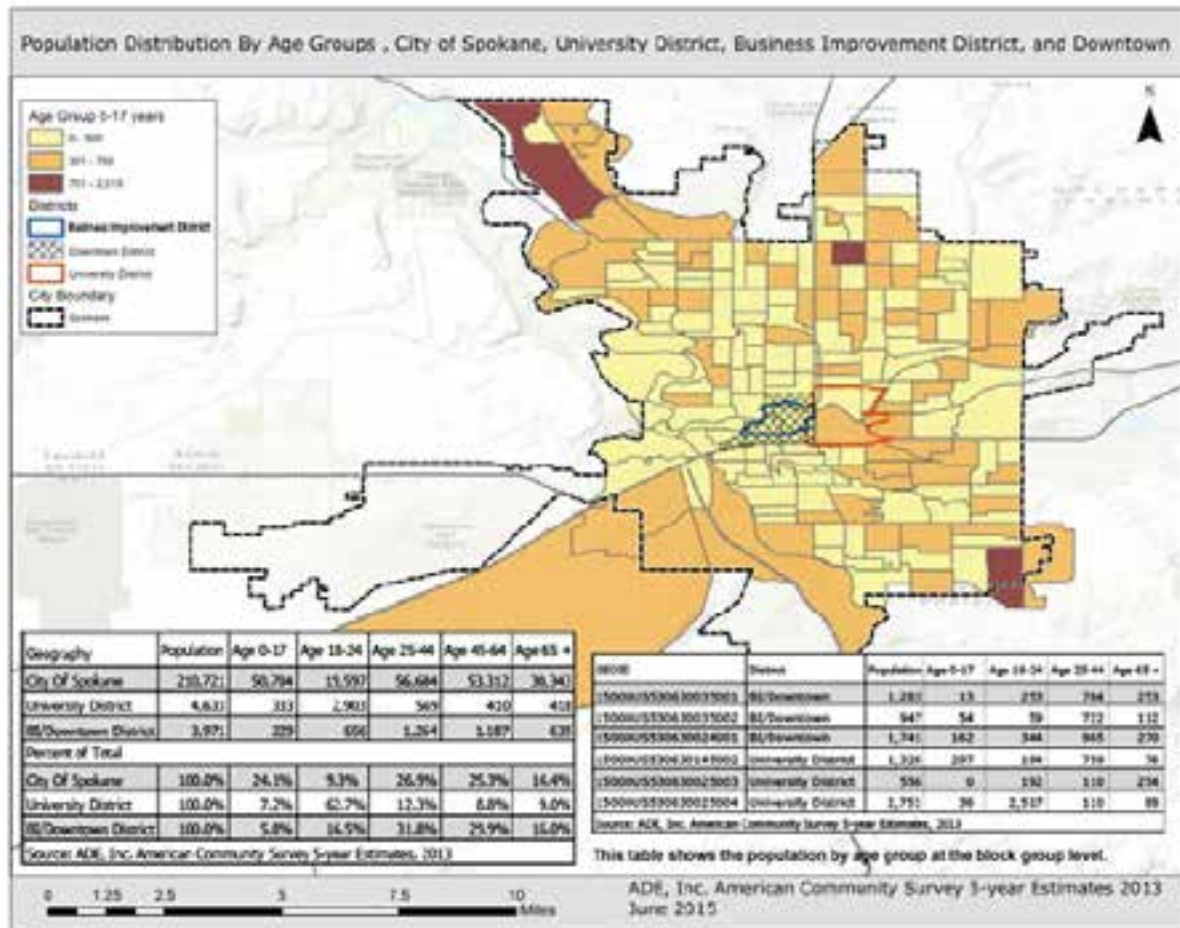
TABLE G

CHARACTERISTICS OF WORKERS LIVING IN THE DOWNTOWN/BID AREA BUT EMPLOYED ELSEWHERE

Job Counts by Earnings (Primary Jobs - Workers Living in the University District and Employed Elsewhere)												
Workers		2008		2009		2010		2011		2012		2013
	Workers	Share	Workers	Share	Workers	Share	Workers	Share	Workers	Share	Workers	Share
Public Administration	5	4.5%	2	3.0%	1	1.2%	12	12.0%	5	4.8%	3	2.8%
Workers by Race												
White Alone	n/a	n/a	602	88.4%	79	92.9%	91	91.0%	99	94.3%	107	98.2%
Black or African America Alone	n/a	n/a	20	2.9%	0	0.0%	2	2.0%	1	1.0%	0	0.0%
American Indian or Alaska Native Alone	n/a	n/a	10	1.5%	1	1.2%	2	2.0%	0	0.0%	0	0.0%
Asian Alone	n/a	n/a	38	5.6%	3	3.5%	5	5.0%	2	1.9%	1	0.9%
Native Hawaiian or Other Pacific Island Alone	n/a	n/a	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Two or More Race Alone	n/a	n/a	11	1.6%	2	2.4%	0	0.0%	3	2.9%	1	0.9%
Educational Attainment of Workers												
Less than High School	n/a	n/a	40	8.8%	4	4.7%	6	6.0%	7	6.7%	10	9.2%
High School or Equivalent, No College	n/a	n/a	171	41.2%	17	20.0%	23	23.0%	26	24.8%	22	20.2%
Some College or Associate Degree	n/a	n/a	150	26.8%	16	18.8%	22	22.0%	21	20.0%	22	20.2%
Bachelor's Degree or Advanced Degree	n/a	n/a	94	12.1%	19	22.4%	13	13.0%	18	17.1%	23	21.1%
Worker Gender												
Male	n/a	n/a	316	46.4%	54	63.5%	53	53.0%	68	64.8%	70	64.2%
Female	n/a	n/a	365	53.6%	31	36.5%	47	47.0%	37	35.2%	39	35.8%
TOTAL WORKERS LIVING IN DOWNTOWN/BID	111	100.0%	67	100.0%	85	100.0%					109	100.0%

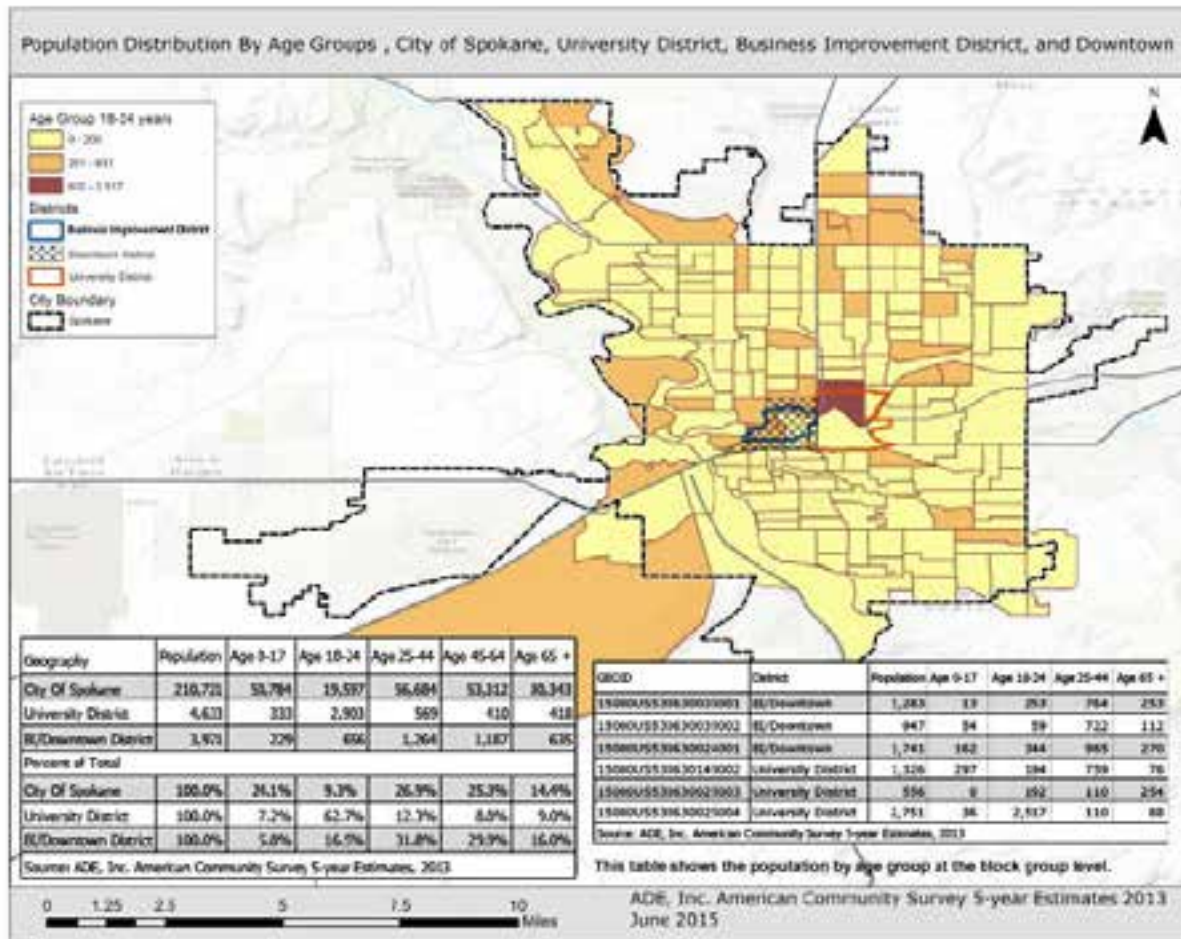
Source: LEHD

APPENDIX 1



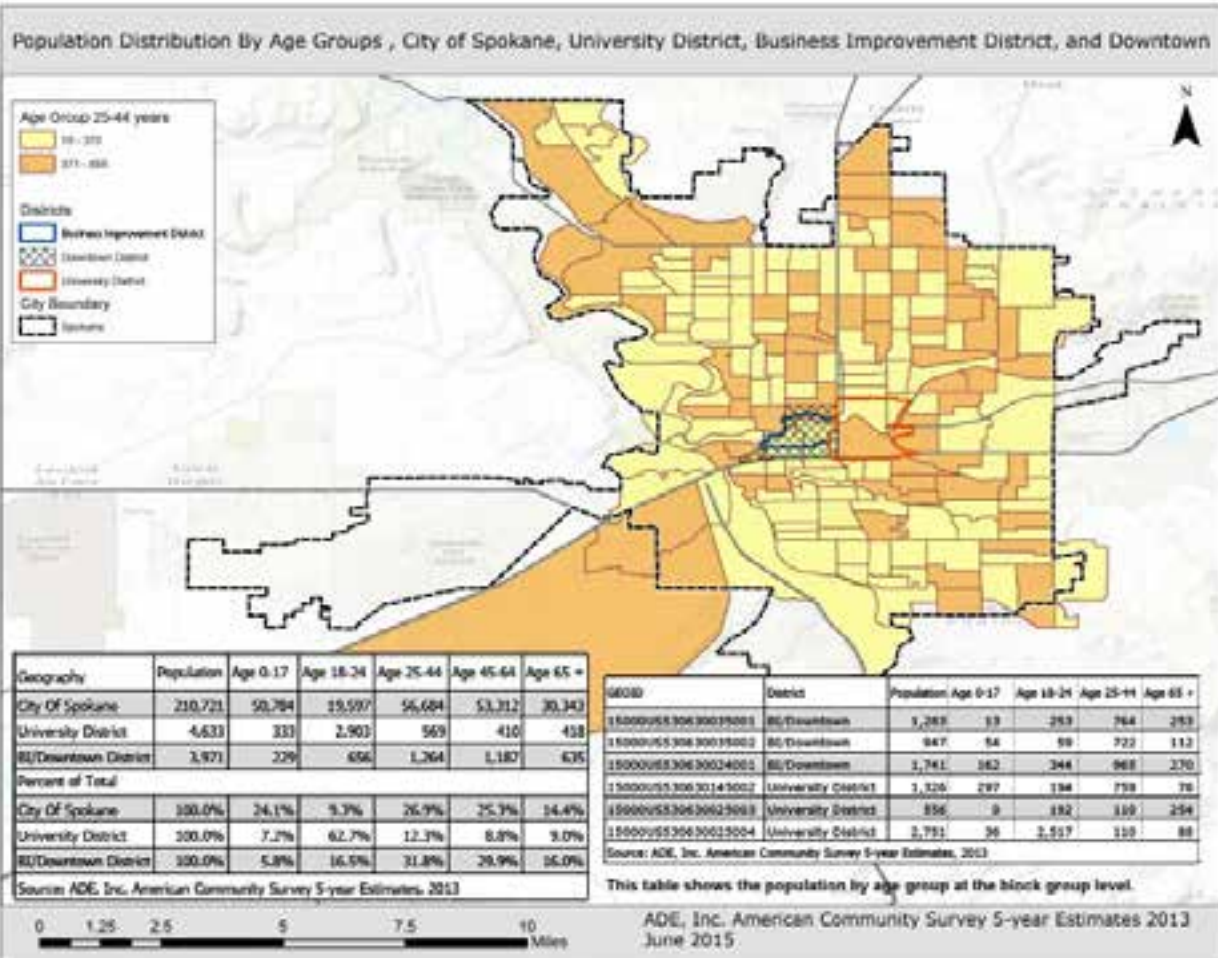
Source: US Census, ADE

APPENDIX 2



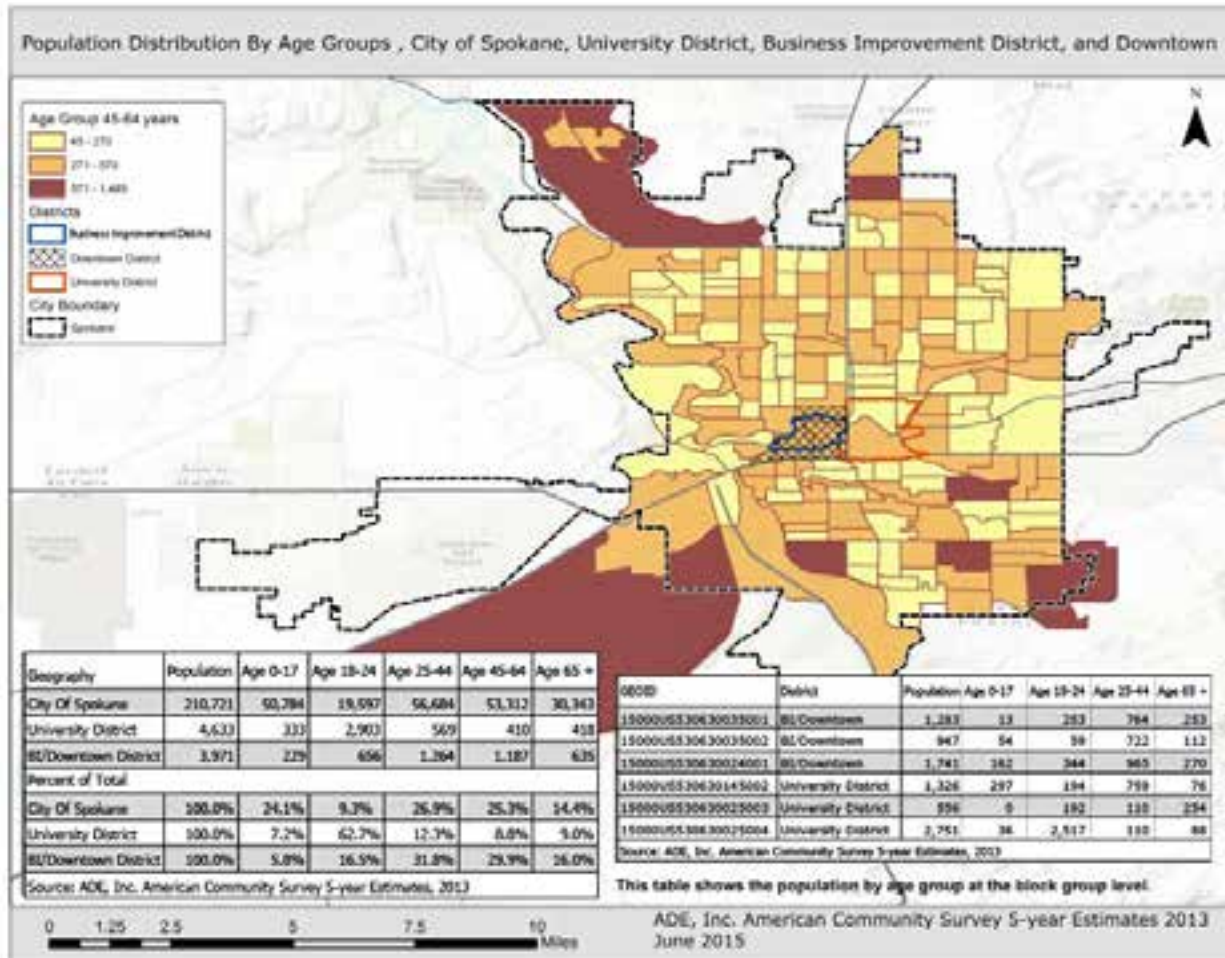
Source: US Census, ADE

APPENDIX 3



Source: US Census, ADE

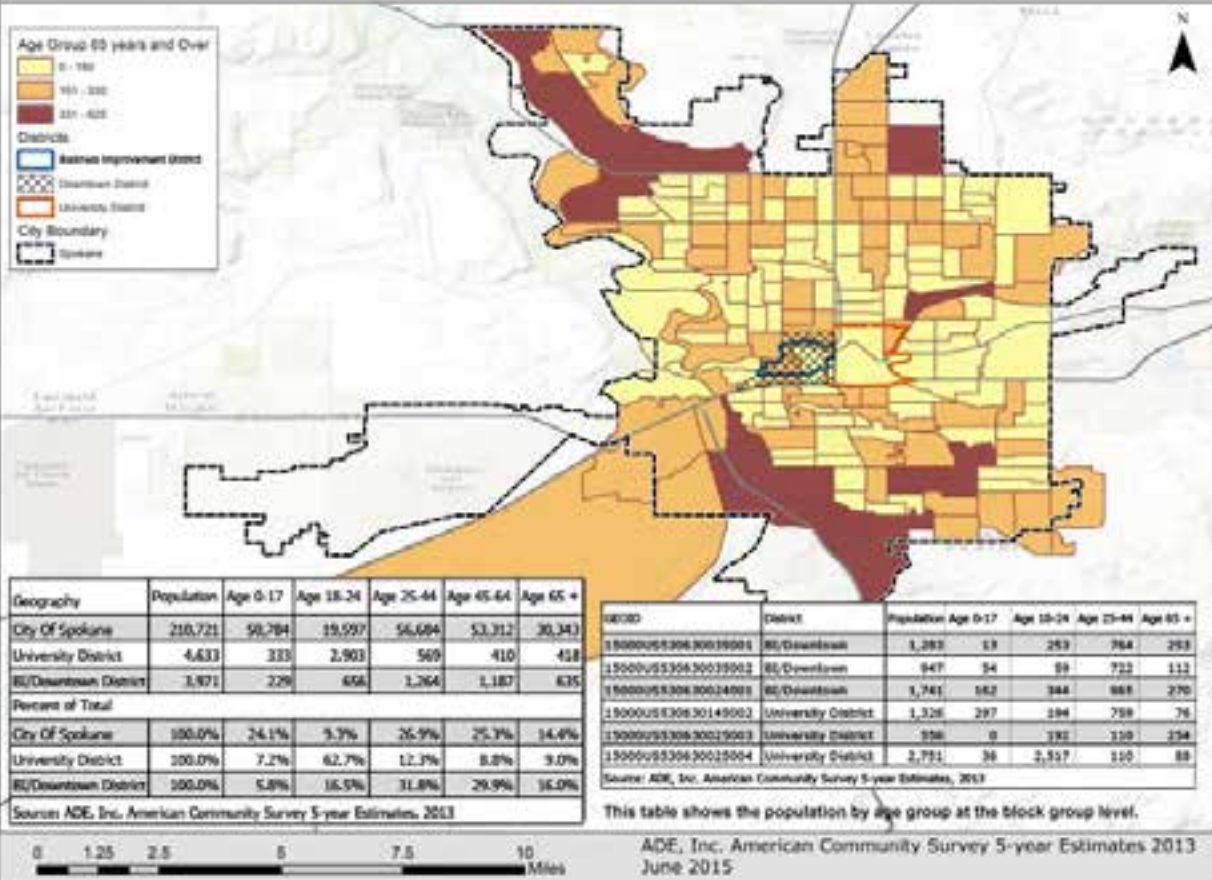
APPENDIX 4



Source: US Census, ADE

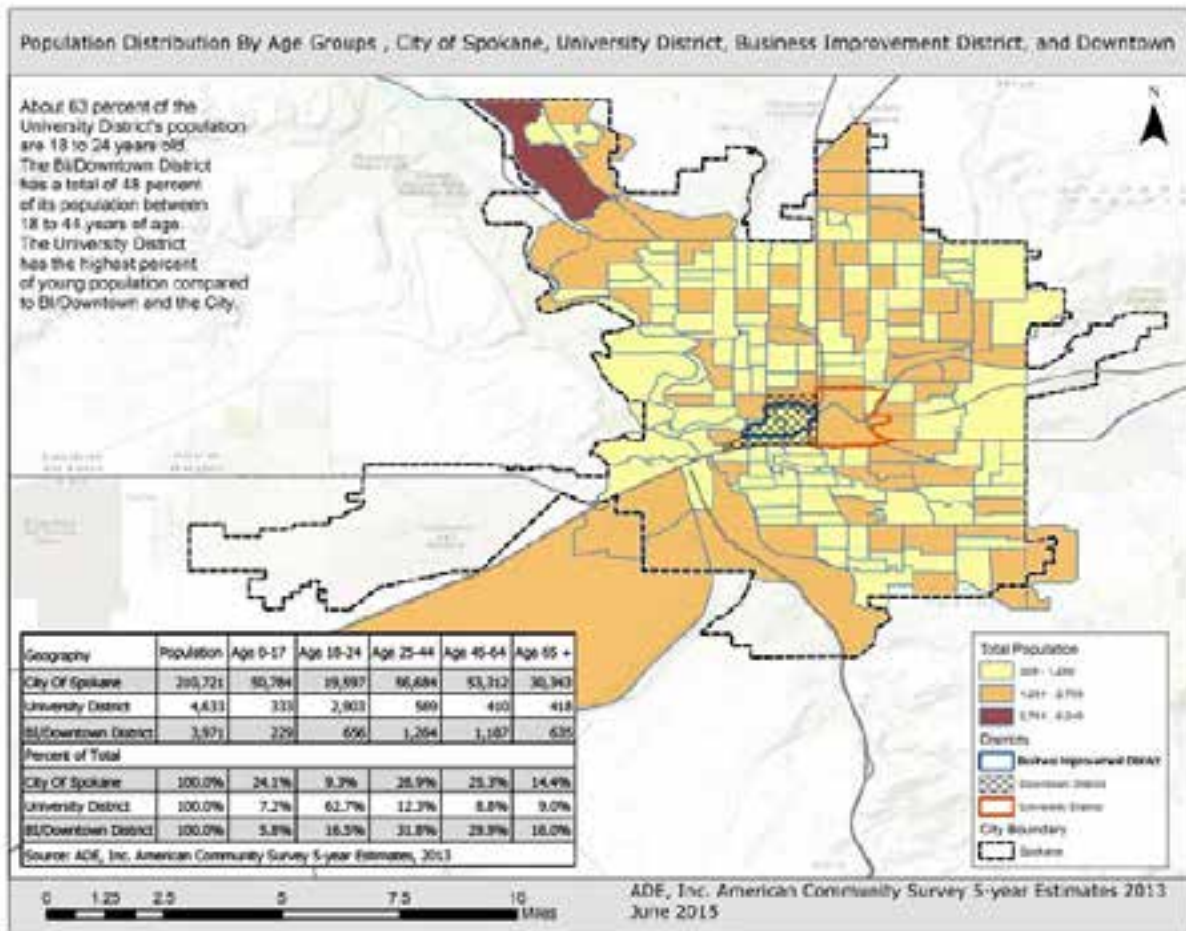
APPENDIX 5

Population Distribution By Age Groups , City of Spokane, University District, Business Improvement District, and Downtown



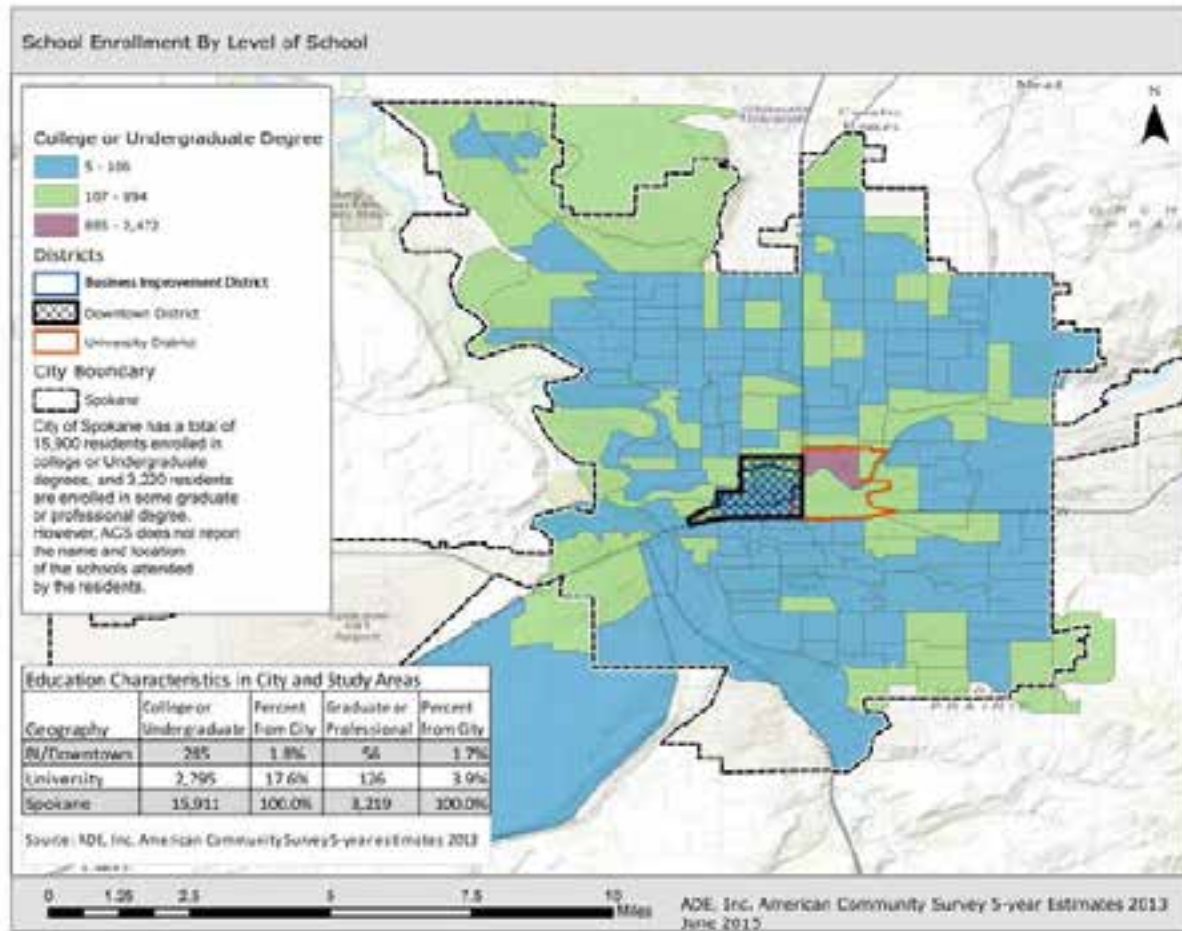
Source: US Census, ADE

APPENDIX 6



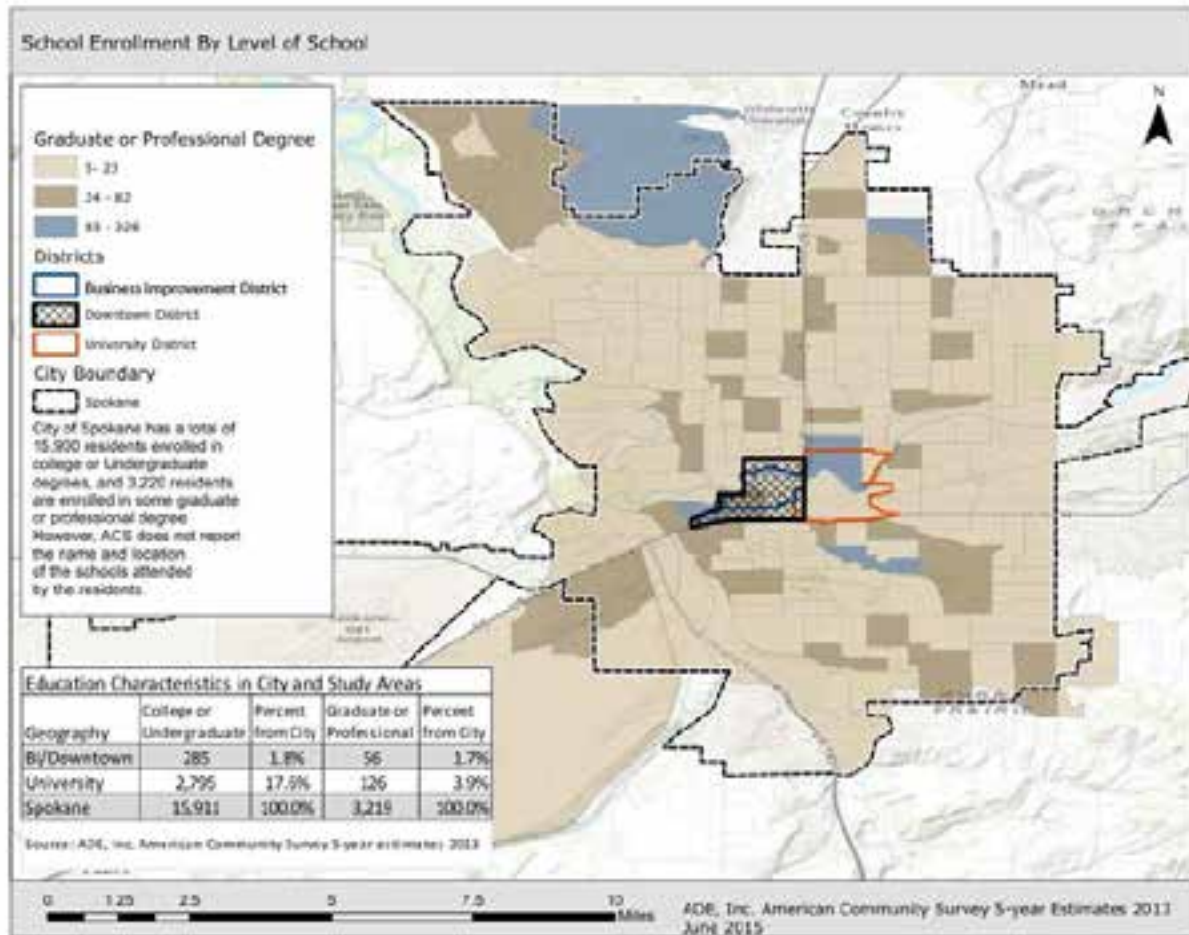
Source: US Census, ADE

APPENDIX 7



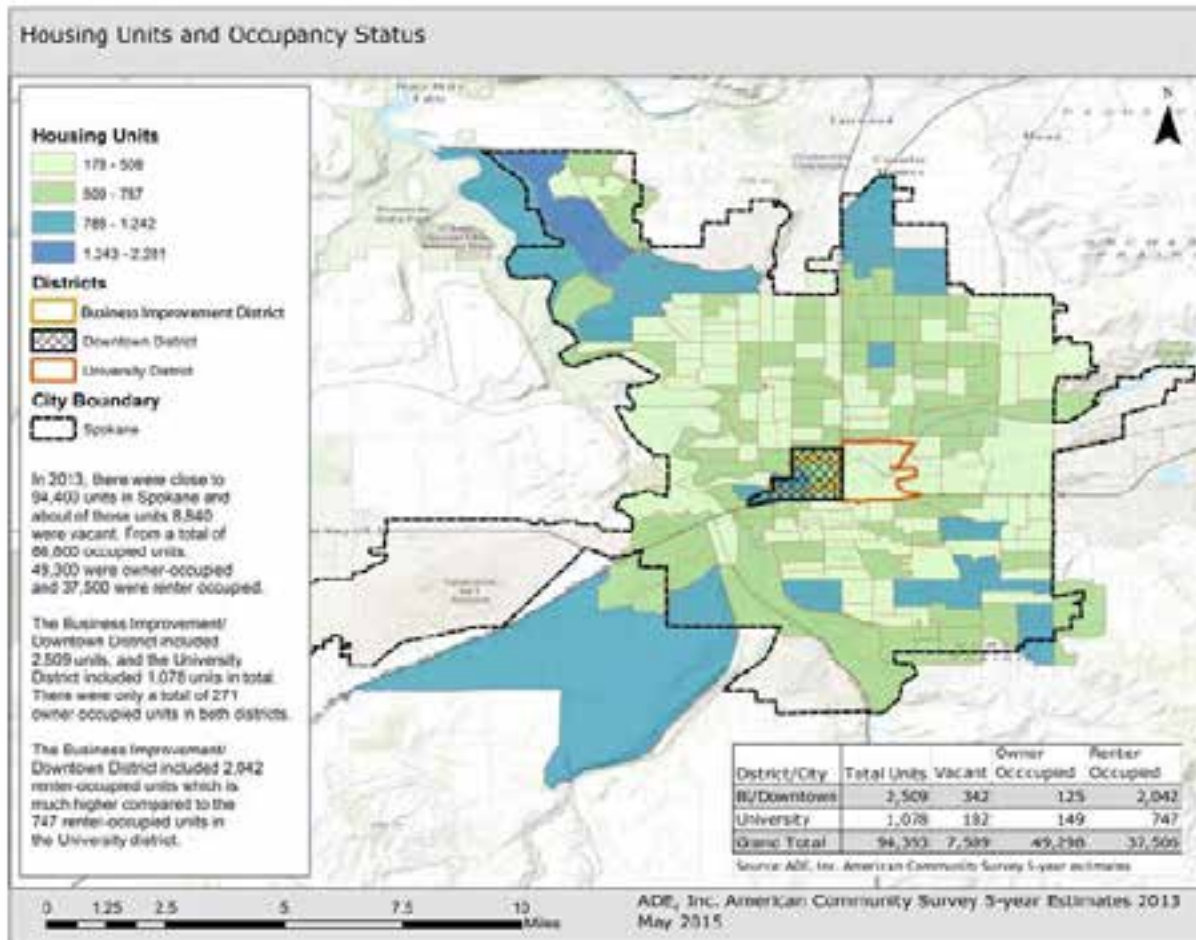
Source: US Census, ADE

APPENDIX 8



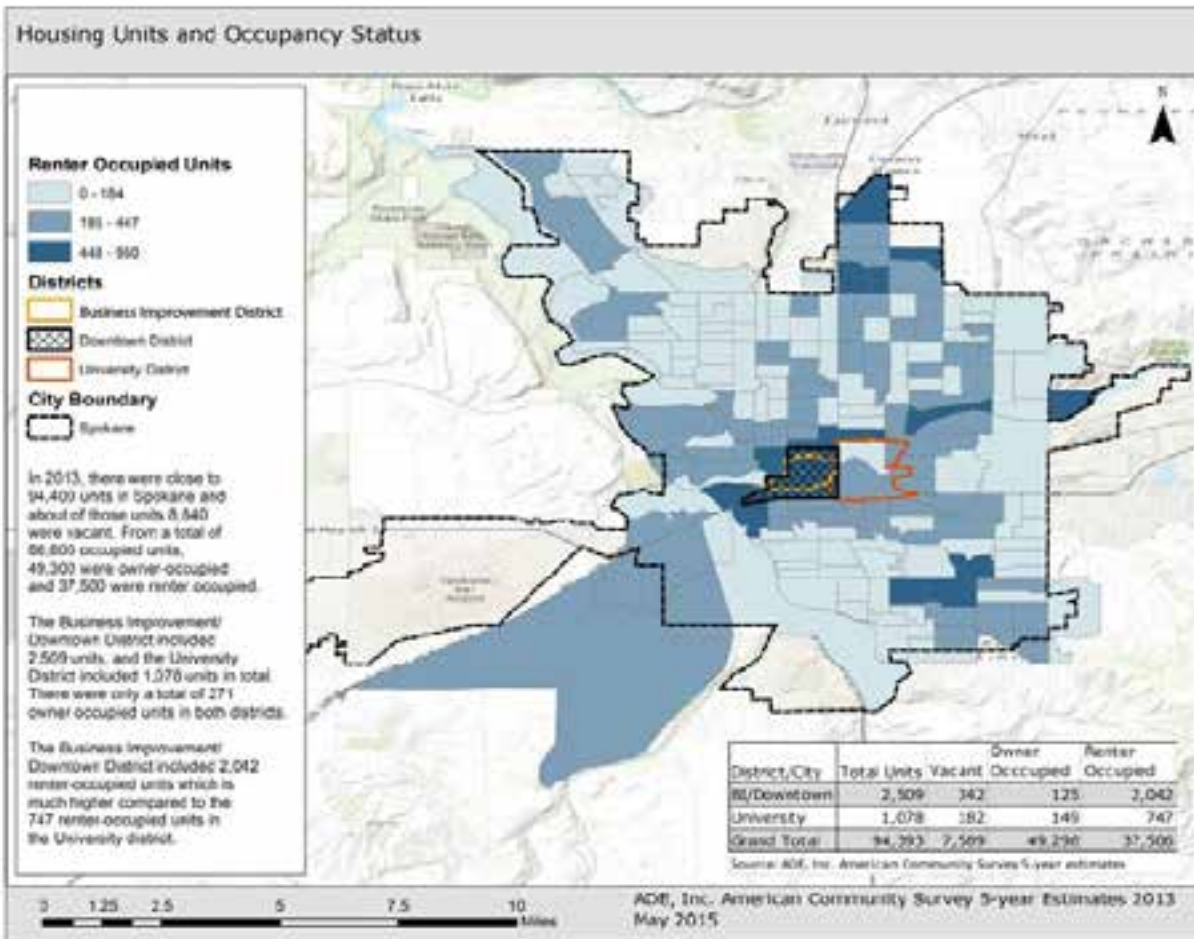
Source: US Census, ADE

APPENDIX 9



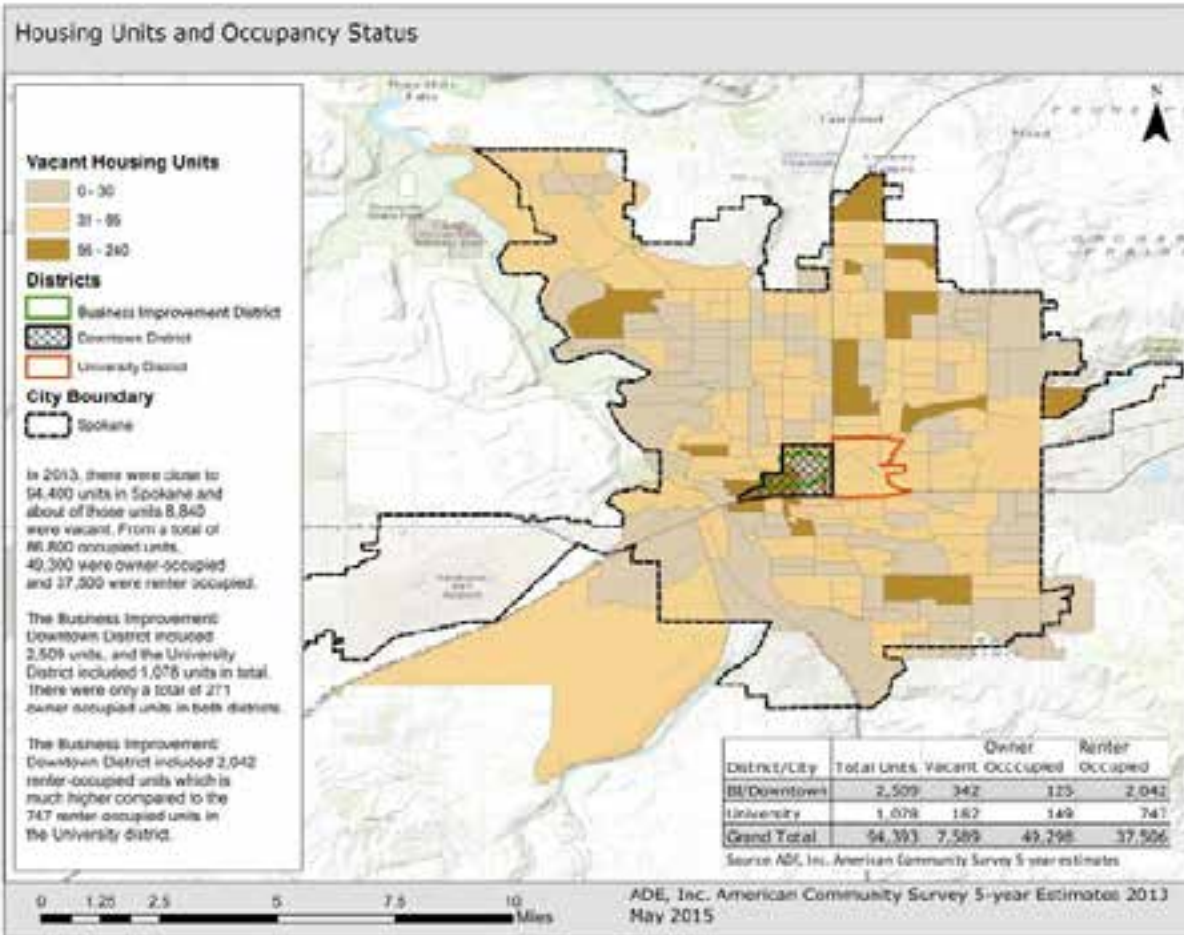
Source: US Census, ADE

APPENDIX 10



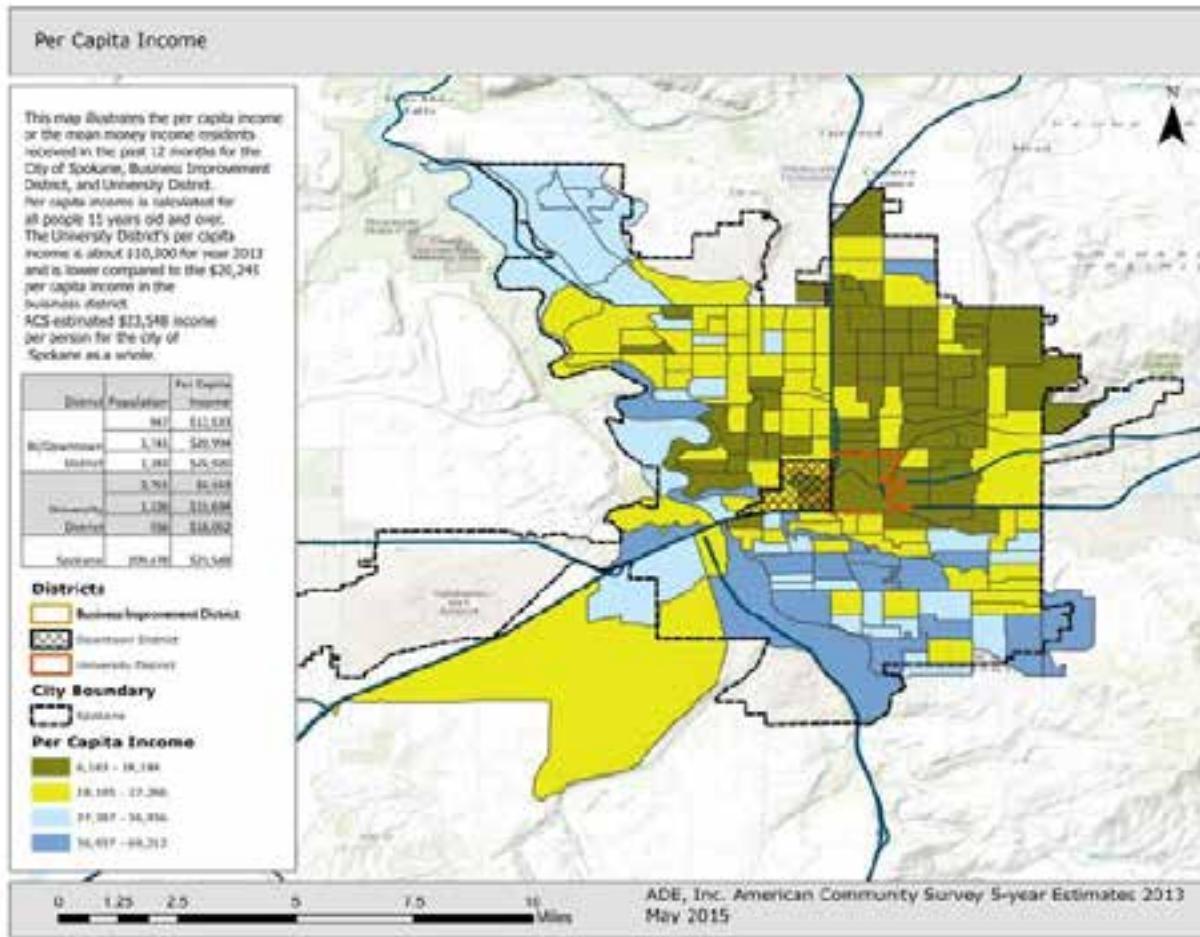
Source: US Census, ADE

APPENDIX 11



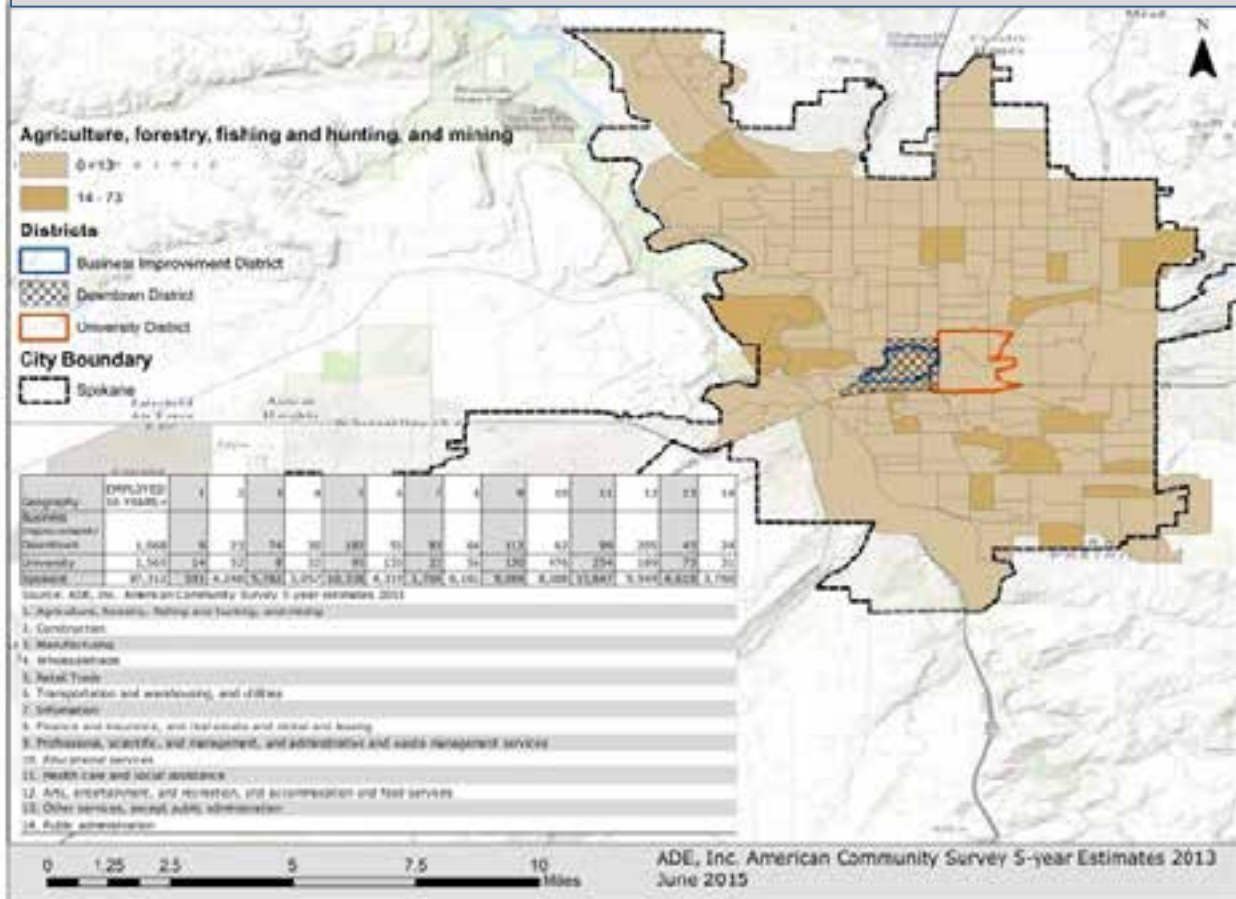
Source: US Census, ADE

APPENDIX 12



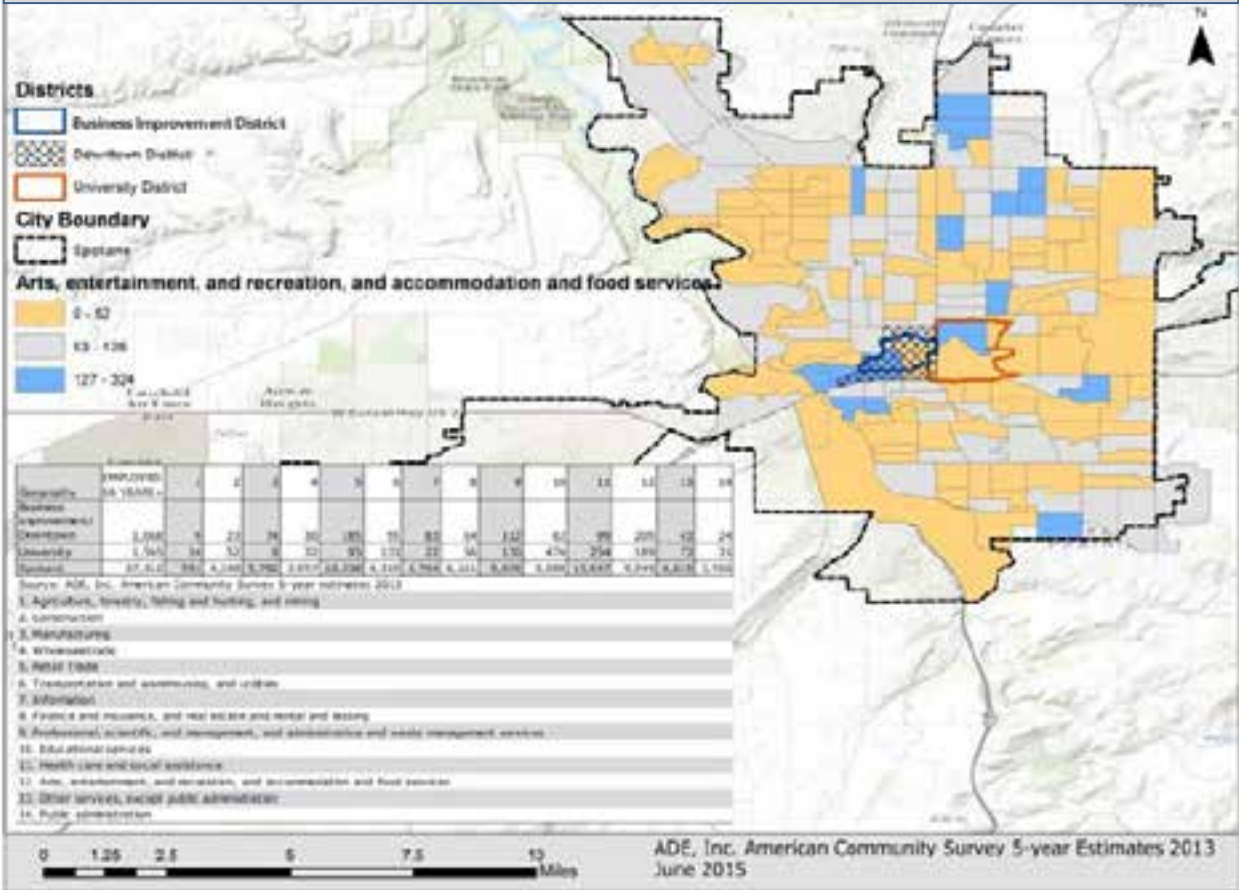
Source: US Census, ADE

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



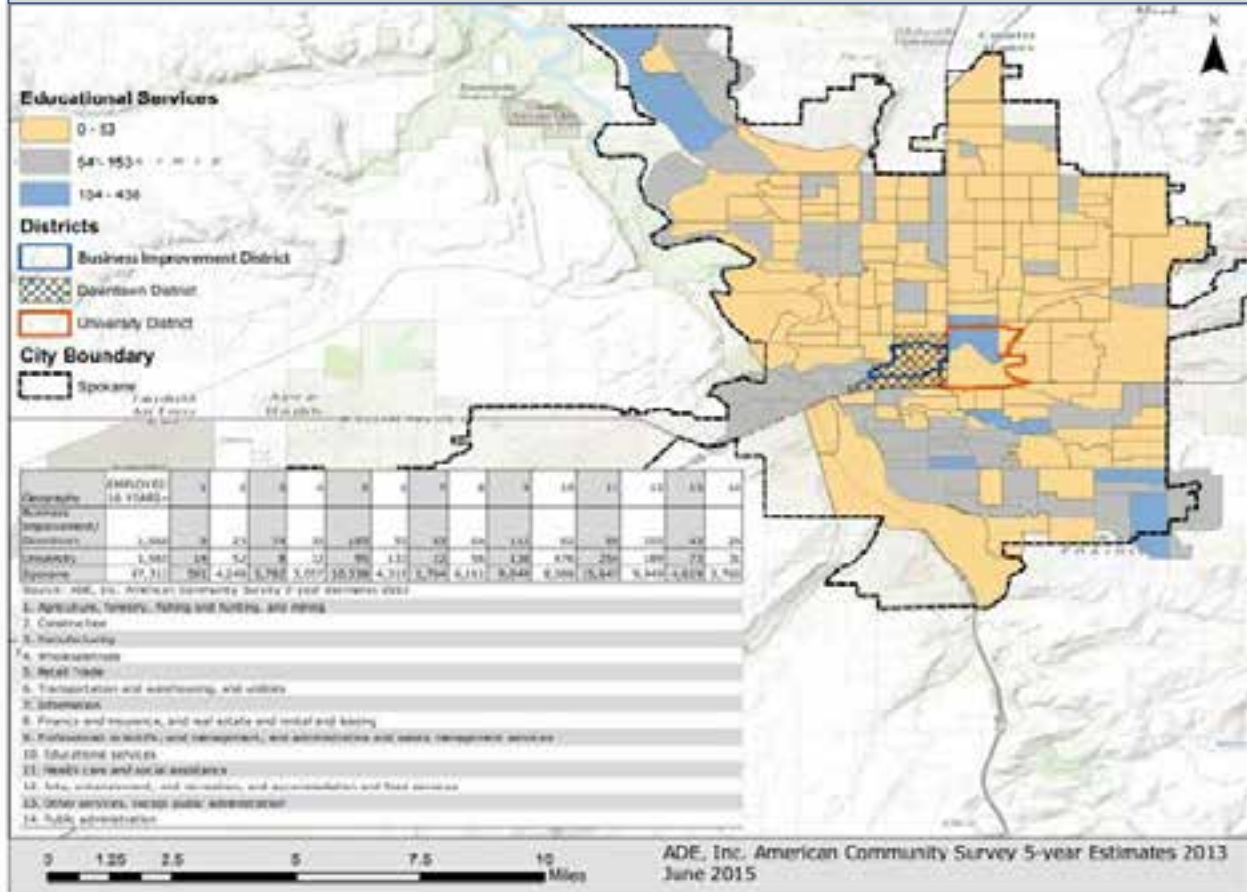
Source: US Census, ADE

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



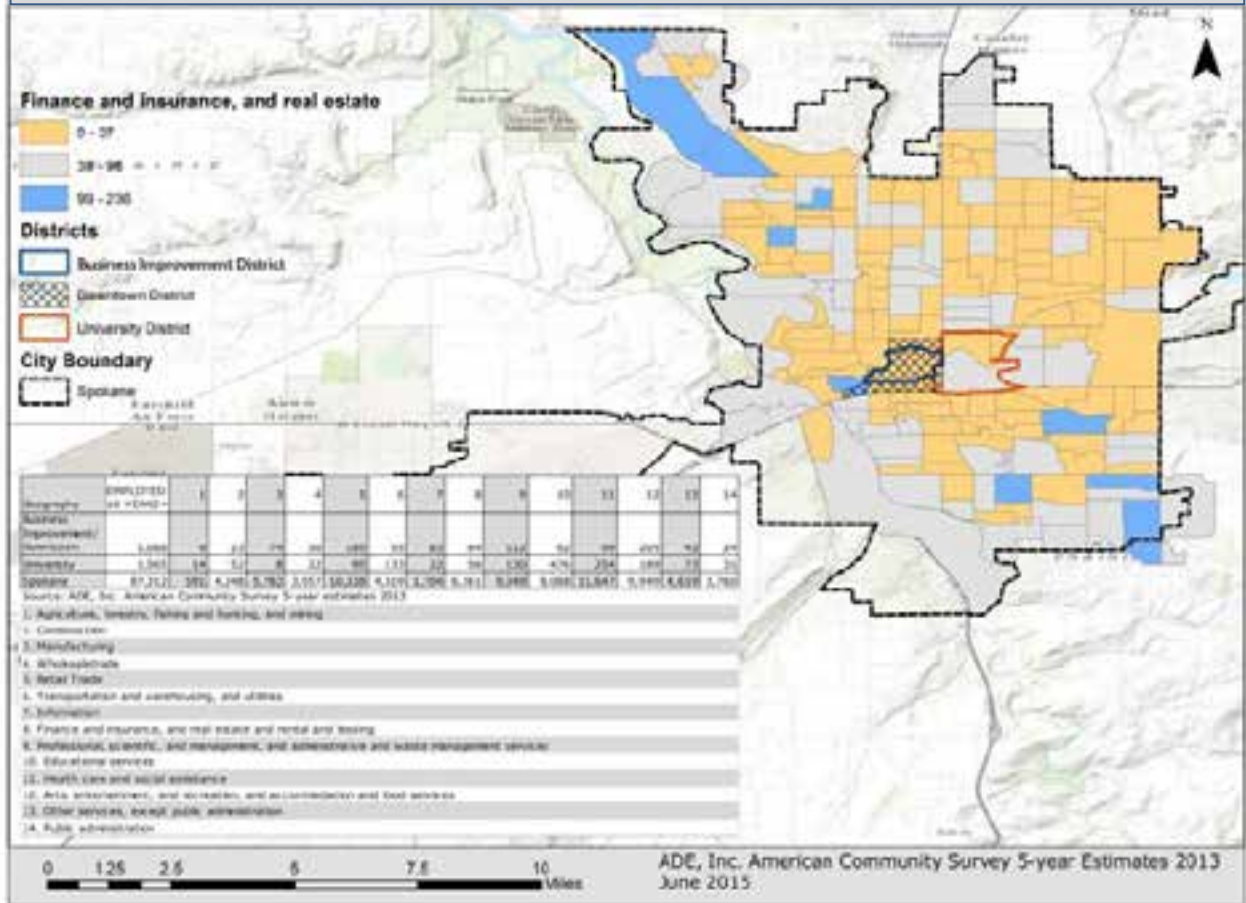
Source: US Census, ADE

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



Source: US Census, ADE

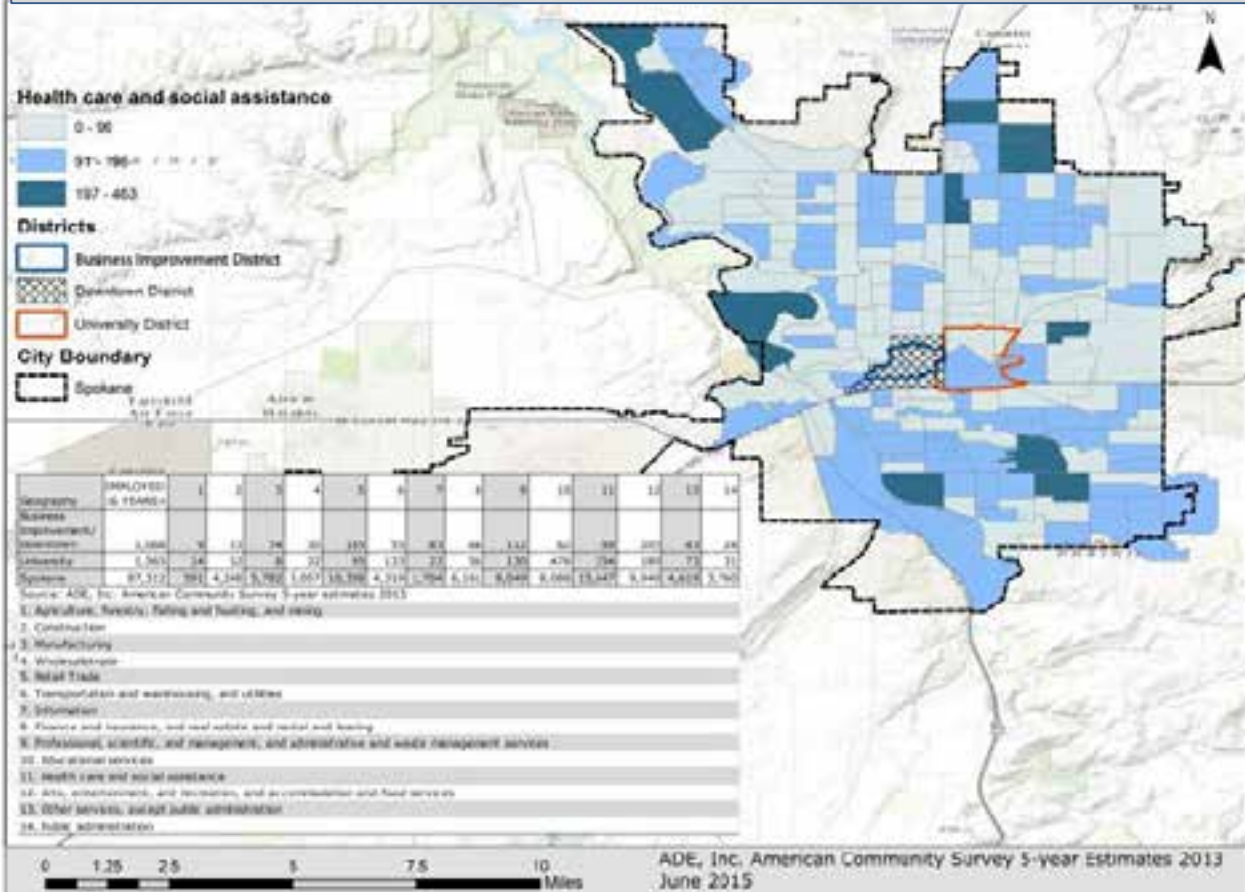
Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



Source: US Census, ADE

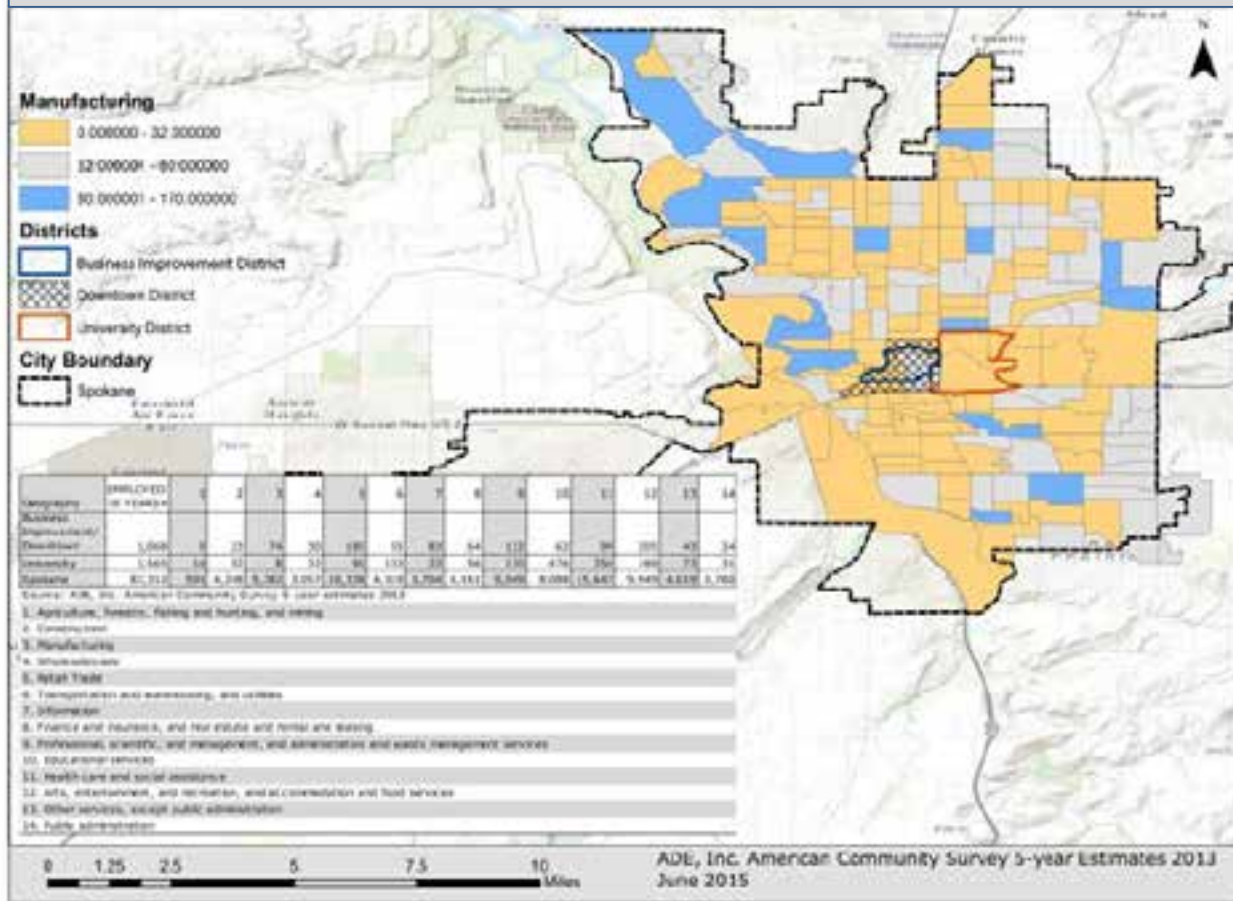
APPENDIX 18

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



Source: US Census, ADE

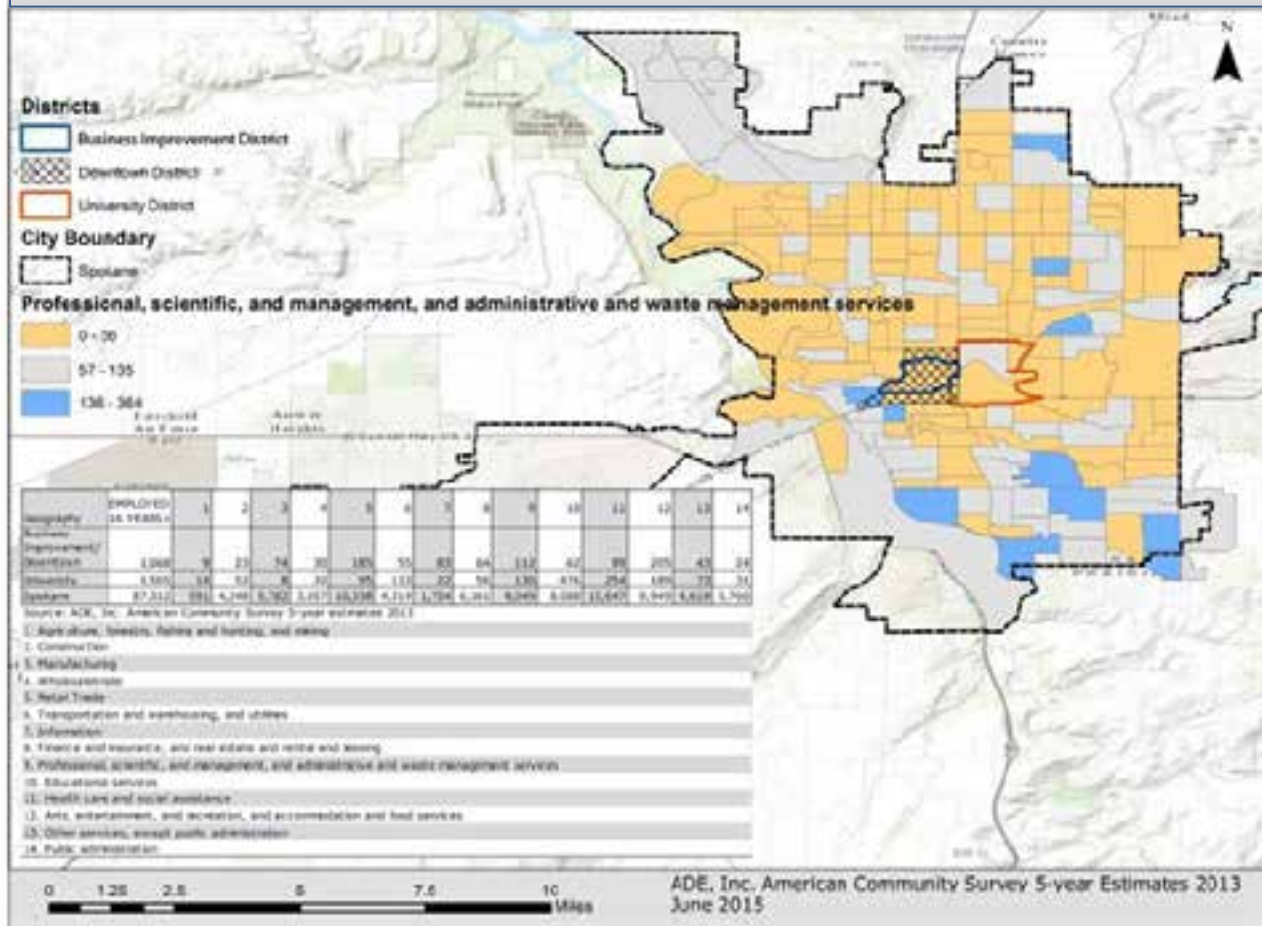
Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



Source: US Census, ADE

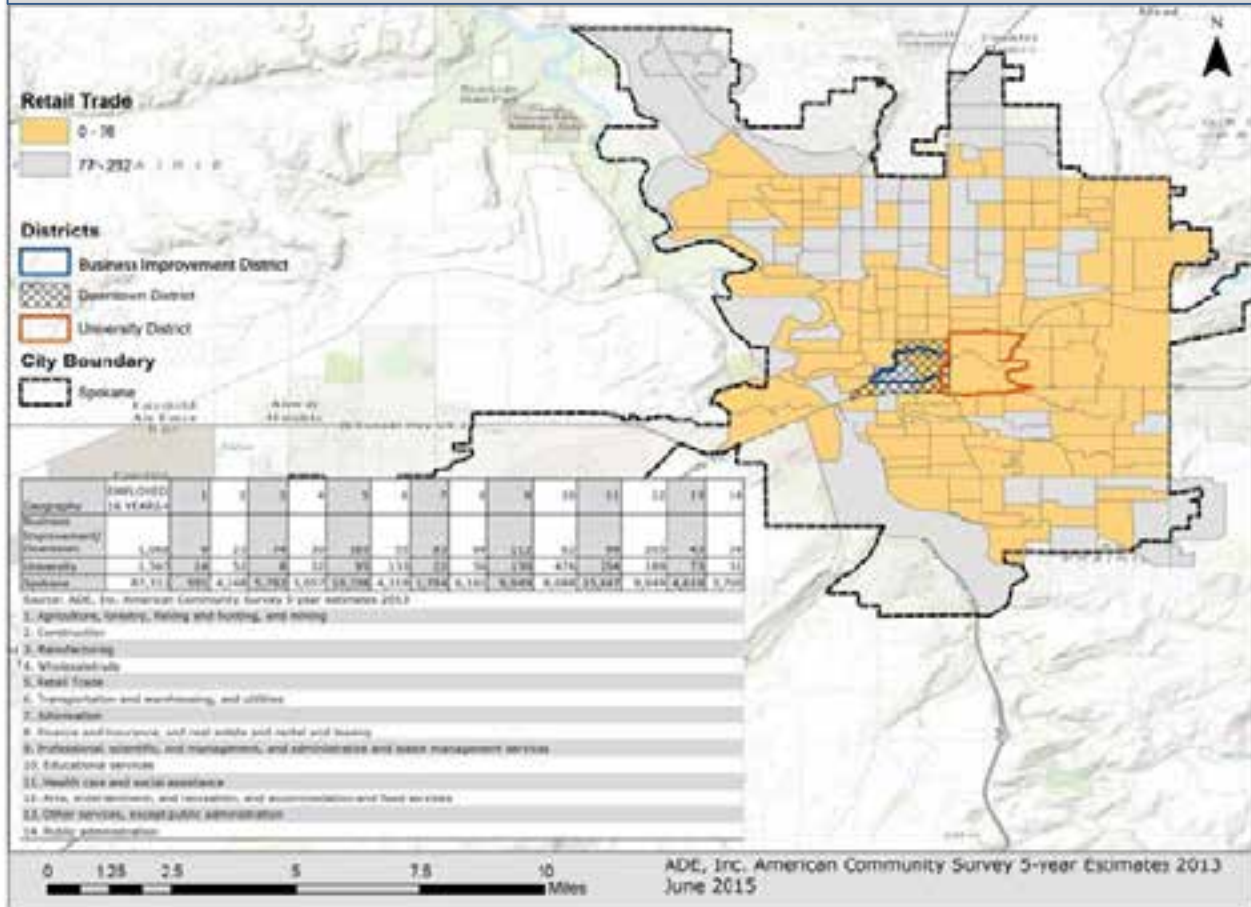
APPENDIX 20

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



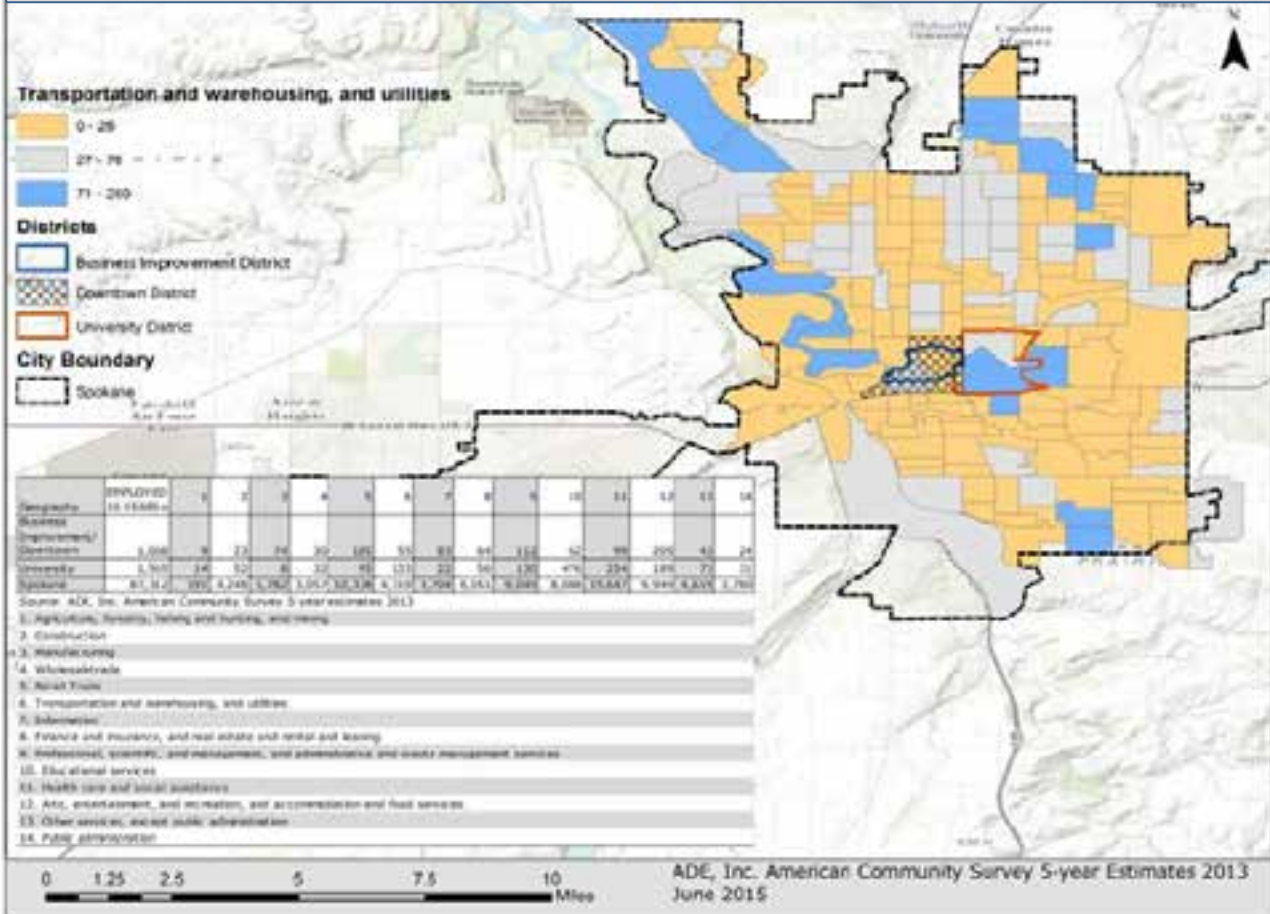
Source: US Census, ADE

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



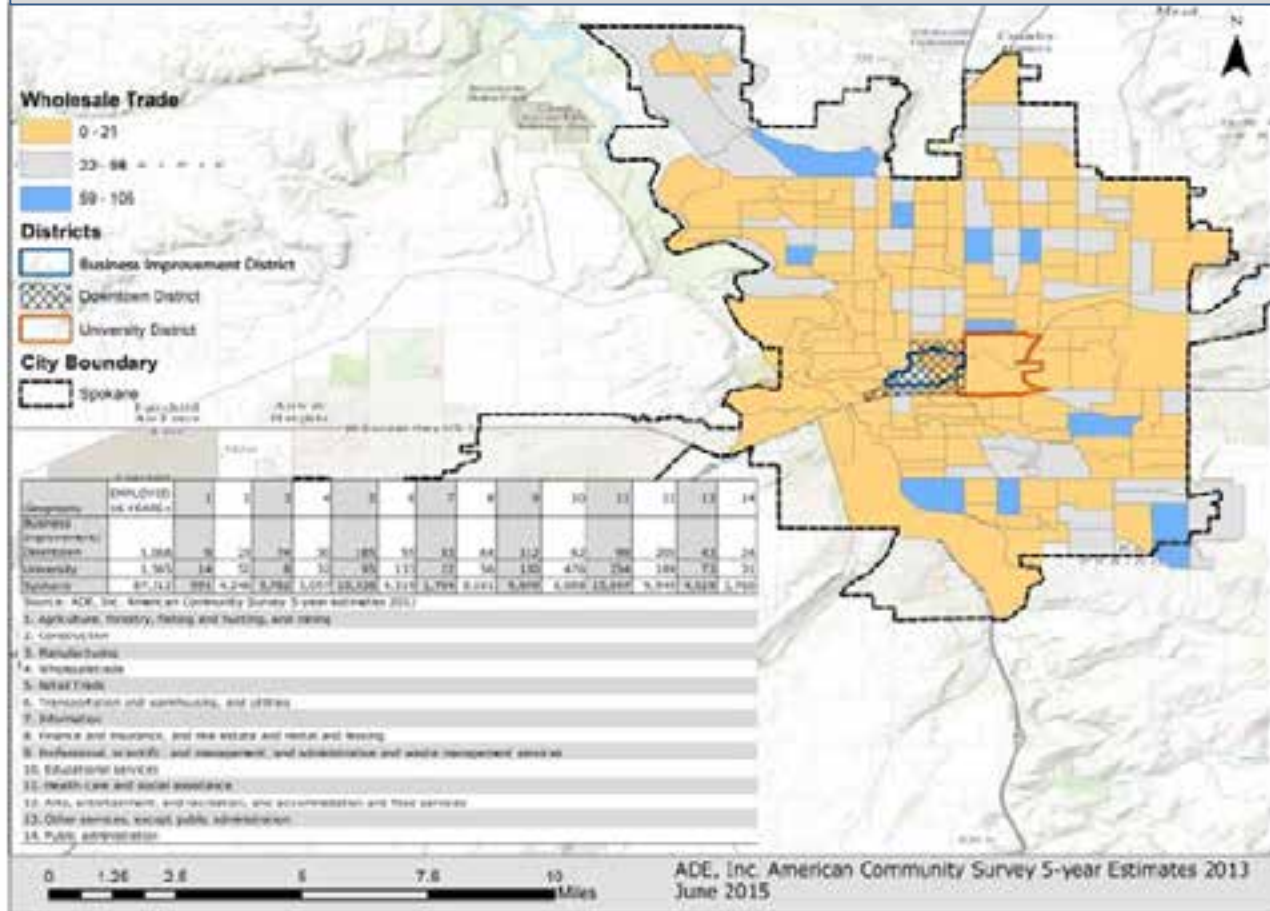
Source: US Census, ADE

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



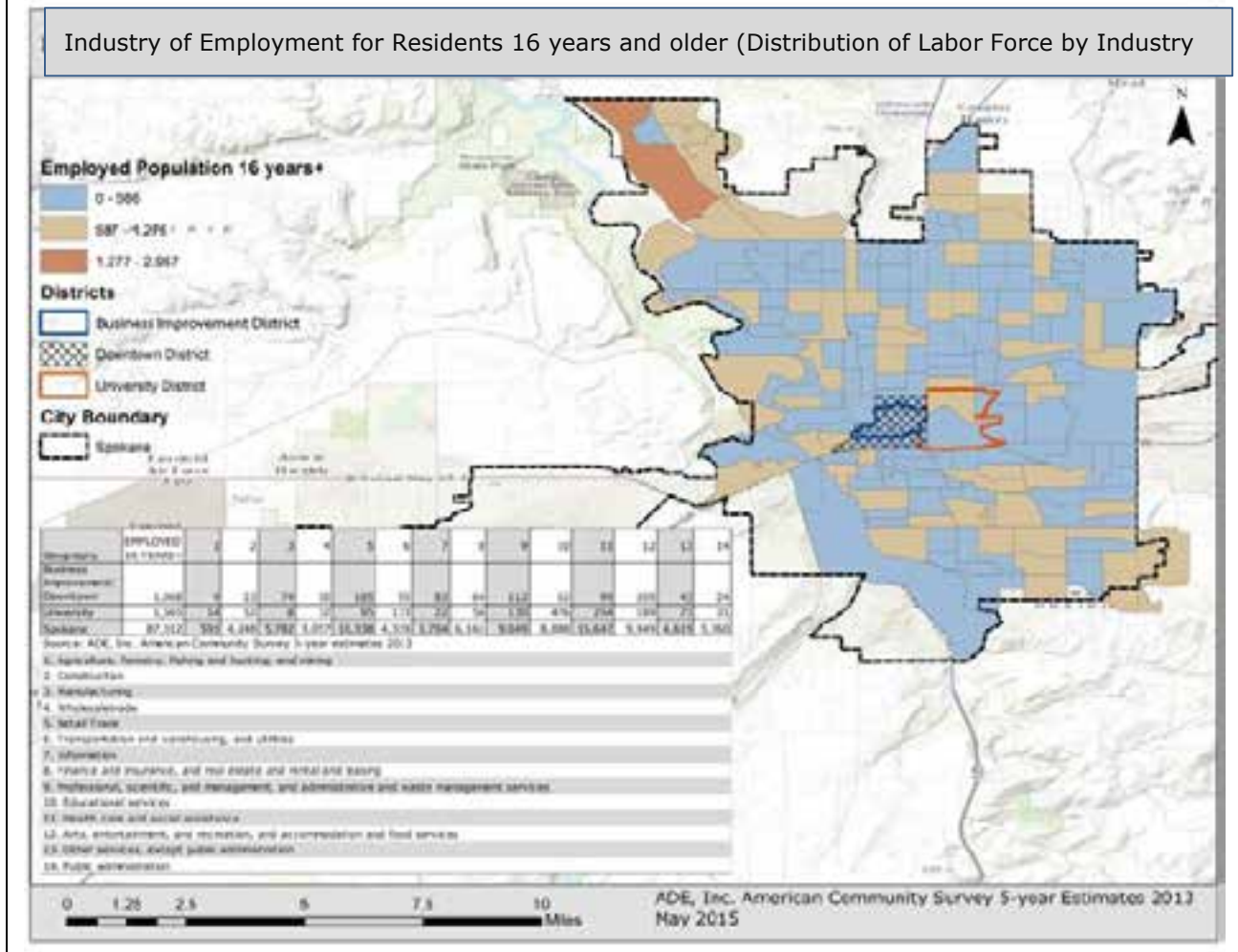
Source: US Census, ADE

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



Source: US Census, ADE

Industry of Employment for Residents 16 years and older (Distribution of Labor Force by Industry)



Source: US Census, ADE



Prepared for the:
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Parking and Business Improvement District
The University District Development Association