

SOUTH KING COUNTY INTERNATIONAL PUBLIC MARKET FEASIBILITY

**Phase 1 Report:
Determine Market Demand,
Feasibility & Benefits of Market
(October 2023)**

PROJECT PARTNERS:



**To learn out more about this project,
visit the project page on the
Port of Seattle Website**

[https://www.portseattle.org
/projects/international-
public-market-feasibility-
study](https://www.portseattle.org/projects/international-public-market-feasibility-study)



Prepared by:



The feasibility study was conducted by New Venture Advisors in partnership with the Port of Seattle and King County, who are acting as co-funders and project leads.



Port of Seattle

The Port of Seattle's mission is to promote economic opportunities and quality of life in the region by advancing trade, travel, commerce, and job creation in an equitable, accountable, and environmentally responsible manner.



King County

King County

As the most populous county in Washington, King County is a vibrant and diverse community of residents from countries across the world. King County's work is guided by its True North, which is that every person be able to thrive, be economically secure, and contribute to the life of their community.



New Venture Advisors LLC

New Venture Advisors (NVA) is a consulting firm that specializes in food system planning and infrastructure development. Since 2009, NVA has helped more than 100 communities across North America identify strategies to develop food systems, food enterprises, and food policies that are good for farmers, food entrepreneurs, consumers, and the intermediaries that connect them.

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Executive Summary

Project Background

In March 2023 the Port of Seattle and King County sought to conduct a feasibility study for the development of an international public market (IPM) facility in South King County. The project team made up of Port and County officials, would be supported in the feasibility process by an Advisory Committee. The Port and County engaged New Venture Advisors (NVA) to conduct the study.

To ensure that the proposed development (the IPM) met community objectives and needs, the study was designed to be conducted in two phases. Phase 1 would include an assessment of the marketplace to assess demand, the benefits of an IPM for the local region, and the feasibility of locating an IPM in South King County. Phase 2 would include site analysis, operational and financial modeling, design development, and finalization of conclusions and recommendations of the feasibility assessment of the concept. This report presents the findings of Phase 1.

The goal of this phase of research was to determine **demand, feasibility, and potential benefits** of an international public market. The findings were presented to the Advisory Committee and project leads in August 2023 and with their approval to move to Phase 2, NVA will apply these findings to concept modeling, site evaluation, and financial modeling.

Purpose and Vision

The **vision** for the project is an international public market that will attract tourists and visitors, provide a gathering space, showcase local cultural attributes, and support economic development and entrepreneurship for small businesses in South King County (with an emphasis on supporting small ethnic businesses).

Three objectives defined the feasibility study's purpose:

1. Conduct thorough stakeholder outreach and engagement to assess demand for a public market, including current market operators, current small business tenants, potential small business tenants, and local food entrepreneurial experts, etc.
2. As part of stakeholder outreach and engagement, determine potential benefits of an international public market in South King County
3. Evaluate current market conditions surrounding public markets and similar entrepreneurial spaces in South King County

Project Goals

The goal of the feasibility study was to understand the demand, viability, and potential benefits of an international public market as well as to identify the components and programs that could be most beneficial to both vendors and consumers. To that end, the study pursued the following objectives:

- identify potential operators
- identify consumer (community) interest: products, foods, services, spaces, etc.
- determine infrastructural and programmatic needs
- identify potential revenue and cost considerations (desired retail rates, desired frequency of vending, etc.)
- identify benefits of an IPM for the local community
- evaluate tourism and regional spending potential
- study regional landscape to understand current market offerings and avoid overlap in services

Methodology

New Venture Advisors has developed a multi-stage planning process. The early stage examines the regional landscape to uncover gaps and opportunities for development. Where enterprise ideas are indicated, NVA develops and refines the business case in a phased approach that tests its viability before advancing. The specific scope of NVA projects varies based on the needs of our clients. For some, NVA focuses on a single step or combination of deliverables in this process; for others, NVA works from idea to venture launch to ongoing strategic support.

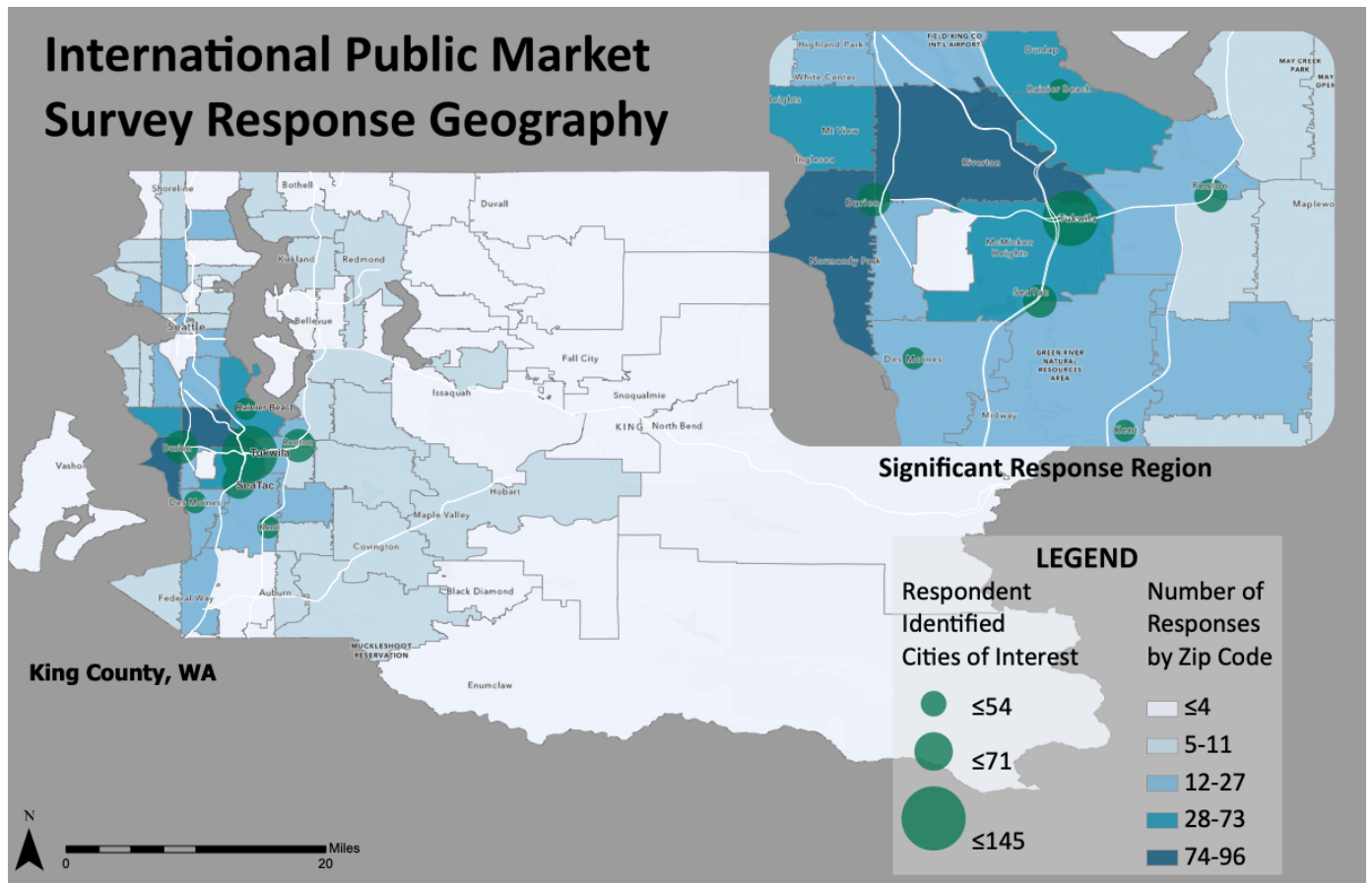
The research tools and methodology were chosen to address the project's diverse audience, the objective information needed in future models (phase 2), and the specific data points highlighted in the scope. Utilizing public and syndicated data, secondary research created an overview of the local, regional, and statewide food systems. Secondary research included a consumer demand analysis to inform the retail components of the project goals. Surveys, interviews, facilitated discussions, in-person visits, and interviews were the primary research tools identified for this project scope. The analysis of primary and secondary research tools presented a viable argument for an International Public Market. The following sections of this report detail the research and analysis performed between May and August of 2023.

Outreach

Utilizing surveys, interviews, and facilitated discussions, NVA was able to collect input from constituencies in 9 different languages and received 928 survey responses. Figure 1 below shows the response rates by zip code; respondents were predominantly from ZIP Codes identified as Tukwila, Seattle, and Burien, with significant responses also coming from SeaTac, Des Moines, and Kent.

At several planned mid-research intervals, NVA engaged the project team and Advisory Committee (detailed later in this report) to ensure that the project received a statistically significant response rate that reflected the region as accurately as possible. The efforts of Phase 1 will be followed by Phase 2, which will allow further opportunities to engage with additional community partners and constituents. Interested parties should refer to the project site for more ways to engage. The project site is linked here: <https://www.portseattle.org/projects/international-public-market-feasibility-study>

Figure 1: King County Survey Response distribution and IPM cities of interest



Summary of Findings

Phase 1 of the International Marketplace Feasibility study is designed to assess the first lever of feasibility, which includes identifying community needs and objectives and whether they align with the proposed project’s objectives and potential outcomes. The analysis and outreach conducted identified clear community interest in and support of the proposed IPM. The potential space needs, community access points, and programs/services that community individuals and groups identified as being of value all align with the potential contributions of an IPM to the regional market.

There is interest in retail/food retail spaces, community spaces, placemaking spaces (gathering), and vendors to support those interests. Businesses expressed a need for business support services to support their growth, and a number of regional organizations identified these as being among the services they offer. And there is a strong desire for authentic cultural representation through vending opportunities and educational or community-focused classes and events.

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- identify benefits of an IPM for the local community
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Research Hypothesis

Iterations of research and planning for a form of an International Public Market in South King County have been discussed for many years. For various reasons, such a market has not yet launched, though there has been significant interest around the concept. When NVA was hired to complete phase one of the research, the project team and Advisory Committee co-chairs committed to completing research and public outreach to determine the current interest in an IPM. It was hypothesized that there would be interest in retail, but other offerings were to be explored, including community space, programming and educational offerings, and other infrastructure considerations like storage, production, parking, etc.

Project Team and Advisory Committee

The feasibility study will be supported by a core project team made up of Port of Seattle and King County representatives.

Table 1: Project Team

Team member		Role
Dave McFadden	Managing director, Economic Development Division	Port of Seattle, project lead
Annie Tran	Economic development manager	Port of Seattle, project lead
Ashton Allison	Director, Economic Opportunity at Office of King County Executive Dow Constantine	King County, project lead
Susanō Surface	Executive analyst, Office of Performance, Strategy, and Budget	King County, project representative

In addition to the Port of Seattle and King County offices, the IPM project is supported by an advisory committee made up of two co-chairs and 24 municipal, resident, organizational, and entrepreneurial representatives. Full advisory committee reviews are scheduled once in the first phase and three times in the second phase.

Table 2: Advisory Committee Members

NAME	Position	Role
Hamdi Mohamed	Port Commissioner, Co-Chair of Advisory Committee	Port of Seattle
Dave Upthegrove	King County Councilmember, Co-Chair of Advisory Committee	King County
Bilan Aden	Associate Director	African Community Housing & Development
Haidar Al-Abedi	Engagement & Outreach Manager	Iraqi Community Center of Washington
Steve Claggett	Community Member	Community Member
Cynthia Delostrinos Johnson	Tukwila City Councilmember	City of Tukwila
Allen Ekberg	Mayor of Tukwila	City of Tukwila
Bookda Gheisar	Senior Director, Office of Diversity Equity and Inclusion	Port of Seattle
Shamso Issak	Executive Director	Living Well Kent
Mohammed Jama	Executive Director of Access to Our Community	Access to Our Community nonprofit and Wadajir Residences and Souq

NAME	Position	Role
Domonique Juleon	Chief Program Officer	Business Impact NW - Food Business Resource Center
Mehdi Jumale	Owner	Tawakal Supermarket and Zain Bakery
Mike Lufkin	Local Food Economy Manager	King County
Annie McGrath	President/CEO	Seattle Southside Chamber
Pete Mills	Commission Office Strategic Advisor - Commissioner Mohamed	Port of Seattle
Munira Mohamed	Executive Director	East African Community Services
Abshir Mohammed	Operator	SeaTac Market
Maribel Pastor	Bilingual Outreach Coordinator	Villa Comunitaria
Diana Phibbs	Chief of Staff - King County Councilmember Dave Upthegrove	King County
Derek Speck	Economic Development Administrator	City of Tukwila
Arni Villanueva Carullo	Chair - Board of Directors	Global to Local - Food Innovation Network
Aleksandr Yermeyev	Economic Development Manager	City of SeaTac

Methodology

New Venture Advisors has developed a multi-stage planning process. The early stage examines the regional landscape to uncover gaps and opportunities for development. Where enterprise ideas are indicated, NVA develops and refines the business case in a phased approach that tests its viability before advancing. The specific scope of NVA projects varies based on the needs of our clients. For some, NVA focuses on a single step or combination of deliverables in this process; for others, NVA works from idea to venture launch to ongoing strategic support.

After the Advisory Committee meeting on September 8, 2023, NVA received a “go-ahead” to continue to Phase 2 of the which will include additional community outreach, initial facility development and financial modeling detailed later in this report.

Timeline

Table 3 below outlines the timeline, details, and methodological approach for this project.

Table 3: Project Timeline and Details

Phase 1 Project Timeline Details	Delivery Dates
Project kickoff with study team <ul style="list-style-type: none"> • Kickoff with Project Team • Advisory #1: Kickoff Presentation • Create and maintain project plan and timeline • Conduct preliminary interviews to inform the research plan • Design research plan • Design and manage stakeholder outreach plan 	May 16, 2023
Advisory Committee kickoff	May 25, 2023
Design research plan <ul style="list-style-type: none"> • Confirm project goals: 	June 14, 2023

<ul style="list-style-type: none"> i. Determine market demand, feasibility, and benefits of an International Public Market development. ii. Determine potential benefits of a market in South King County (define potential study area). iii. Evaluate current market conditions surrounding public markets and similar spaces in South King County. <ul style="list-style-type: none"> • Design research tools: Surveys, interviews, secondary research, and case studies <ul style="list-style-type: none"> Includes – Consumer demand analysis Includes – In-person workshops/focus groups, interviews, or survey engagement 	
Finalize research tools	June 23, 2023
Conduct interviews	June 12–July 14, 2023
Survey available to the public	June 27 and July 31, 2023
NVA on-site	July 18–20, 2023
Synthesis and analysis	August 1–25, 2023
Present research findings to study team	August 28, 2023
Present research findings to Advisory Committee	September 8, 2023

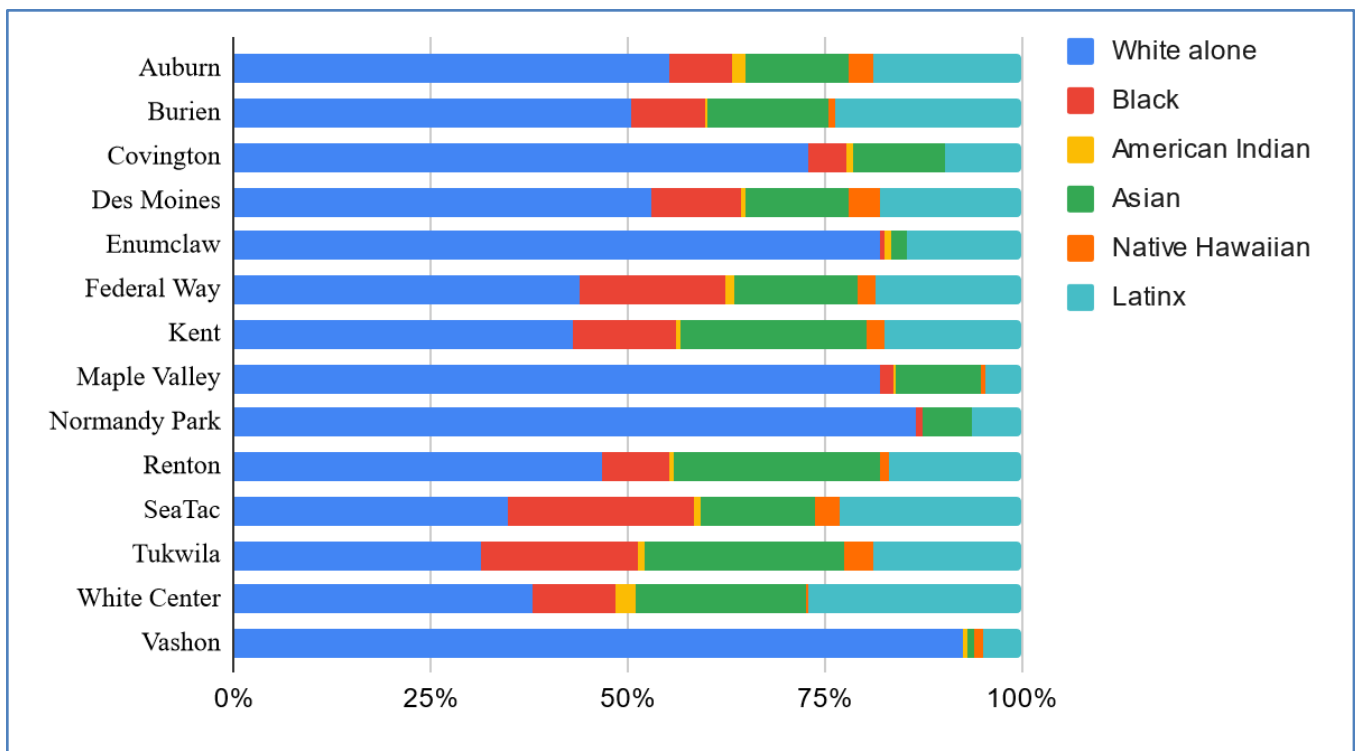
Market Analysis

Landscape Analysis

A landscape analysis of the region was conducted in July 2023 to gain a better understanding of regional demographics, economic conditions, and the food system landscape as it relates to a public market. Secondary research accessed public and syndicated data to create an overview of the local, regional, and statewide food systems.

According to the 2020 Census, 665,655 people reside in the study area, a 24.8 percent population increase from 2010. The three most populous areas are Kent (136,588), Renton (106,785), and Federal Way (101,030). The region is diverse, with 51.5 percent of the population identifying as White alone, 9.5 percent as Black, 0.8 percent as American Indian, 14.3 percent as Asian, 1.5 percent as Native Hawaiian, and 15.7 percent as Latinx.¹

Figure 2: Population demographics in the South Seattle Region



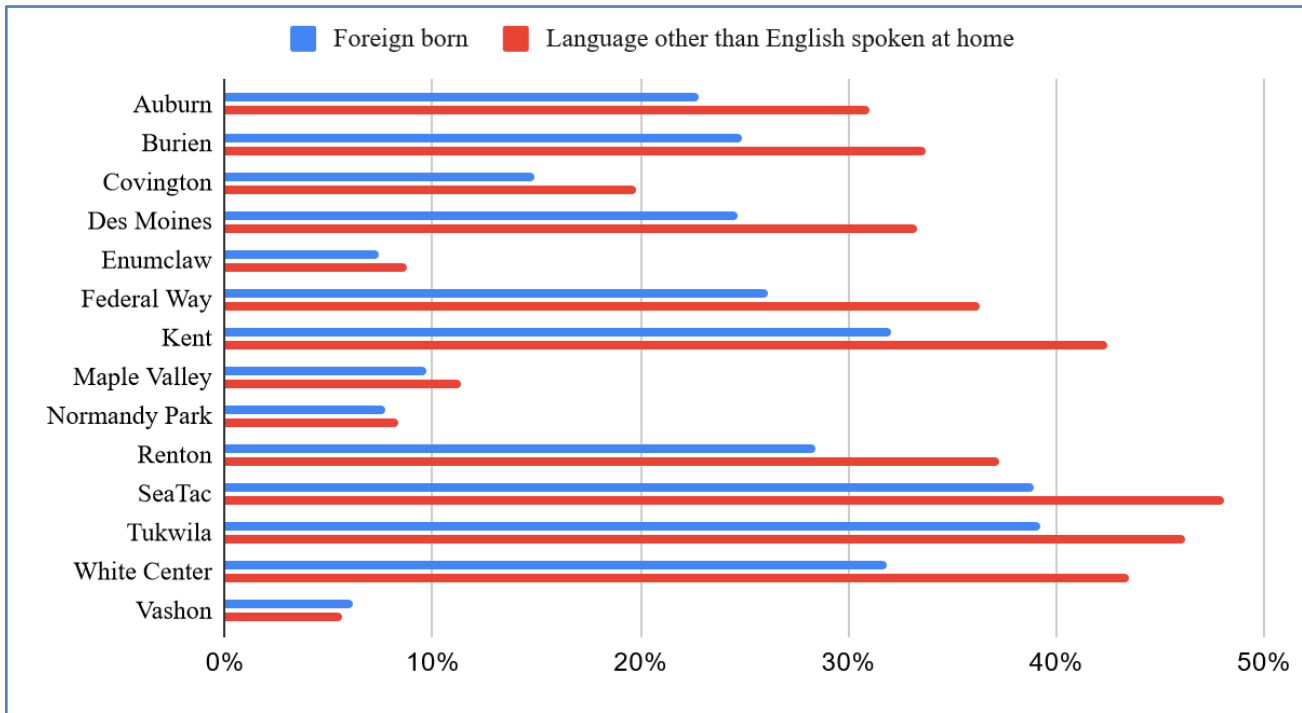
Washington State is the third largest refugee-receiving state in the United States. In the study area, 22 percent of the population is foreign-born, and 30 percent speak a language other than English at home. The foreign-born population grew by 39.8 percent from 2010 to 2020, from 117,342 to 173,094.² A 2016 study by the Pew Research Center, estimates there are 140,000 undocumented immigrants in the Seattle–Tacoma–Bellevue metro area.³

¹ United States Census Bureau, “Quick Facts,” 2020, <https://www.census.gov/quickfacts/WA>.

² Ibid.

³ Pew Research Center, “Estimates of U.S. Unauthorized Immigrant Population, by Metro Area, 2016 and 2007,” 2016, <https://www.pewresearch.org/hispanic/interactives/unauthorized-immigrants-by-metro-area-table/>.

Figure 3: Foreign-born population (by city) in South Seattle region



The industries that have the highest share of foreign-born workers in the Seattle metropolitan area are professional, scientific, and technical services (32%); administrative support (31%); information (28.7%); health care and social support (26.7%); and tourism, hospitality, and recreation (27%).⁴

Food Access

Access to healthy food options is essential to healthy eating habits, which are, in turn, essential to good health. Food access considers a consumer’s ability to physically get to places where healthy foods are available for purchase, the affordability of healthy food options, and the availability of assistance to ensure consumers can purchase healthy food.

- In 2021, the overall food insecurity rate for all people in King County was 7.3 percent; the insecurity rate among children was 8.1 percent. These rates are lower than the Washington state average of 8.9 percent and 11.8 percent, respectively.⁵
- The food insecurity rate is higher for non-White populations: for Black persons, the rate is much higher at 23 percent, and for Latino persons, it is 16 percent.
- Eight percent of all households in King County are enrolled in SNAP. Only 5.4 percent of White households are enrolled in SNAP, whereas 25.7 percent of Black households and 13.7 percent of Latino households are enrolled in SNAP.⁶

⁴ New American Economy, Seattle Metro Area, 2022, <https://www.newamericaneconomy.org/city/seattle/>.

⁵ Feeding America, Map the Meal Gap, 2021, <https://map.feedingamerica.org/county/2021/overall/washington>.

⁶ United States Census Bureau, “Food Stamps/SNAP in King County, 2021 American Community Survey 5-Year Estimates,” 2023, [https://data.census.gov/table?q=S2201:+FOOD+STAMPS/SUPPLEMENTAL+NUTRITION+ASSISTANCE+PROGRAM+\(SNAP\)](https://data.census.gov/table?q=S2201:+FOOD+STAMPS/SUPPLEMENTAL+NUTRITION+ASSISTANCE+PROGRAM+(SNAP)).

Small Business Landscape

A recent SmartAsset study ranked King County seventh best among Washington’s 39 counties for small-business owners in 2020. In King County, almost 23.5 percent of the tax-filing population reported small-business income, and over 7.9 percent of total income was from small businesses.⁷ The report “Immigrants and Opportunity in America’s Cities” reviewed 12 key indicators in America’s 100 most populous metropolitan areas to identify the communities where immigrants thrive. According to the report, the Seattle–Tacoma–Bellevue metro area ranks as the fourth best city for immigrants.⁸

As of 2019, there were 284,846 nonemployee establishment owners in the Seattle–Tacoma metropolitan area. Of these, 18 percent were foreign-born. Of the nonemployee establishments, 1,871 fell within food manufacturing, food retail, and restaurant sectors as indicated in Table 4.⁹

Table 4: Nonemployee establishments in the Seattle–Tacoma metropolitan area, 2019

	Number of nonemployee establishments	Sales, value of shipments, or revenue
FOOD MANUFACTURING	451	\$24,120,000
- Sugar and confectionery product manufacturing	32	\$790,000
- Fruit and vegetable preserving and specialty food manufacturing	32	\$2,171,000
- Seafood product preparation and packaging	38	\$3,853,000
- Bakeries and tortilla manufacturing	115	\$4,207,000
- Other food manufacturing (teas, coffee, spices, snack foods, dressing, etc.)	185	\$10,194,000
SPECIALTY FOOD STORES	332	\$23,665,000
GROCERY STORES	277	\$31,015,000
RESTAURANTS & OTHER EATING PLACES	813	\$68,629,000

As of 2021, there are 12,495 foreign-born business owners in the Seattle–Tacoma metropolitan area.¹⁰ Recognizing the important contributions immigrants make to the state's economic vitality, in 2019, the legislature passed SB 5497, "ensuring the state of Washington remains a place where the rights and dignity of all residents are maintained and protected in order to Keep Washington Working."¹¹ A work group was established to bring recommendations to the governor and legislature with respect to legalization and related workforce and

⁷ Puget Sound Business Journal, “Study: Here’s Where King County Ranks Among the Best Places for Small Businesses,” 2021, <https://www.bizjournals.com/seattle/news/2021/04/04/king-county-ranked-wa-for-small-businesses.html>.

⁸The George W. Bush Institute-SMU Economic Growth Initiative, “Immigrants and Opportunity in America’s Cities,” 2022, <https://gwbushcenter.imgix.net/wp-content/uploads/Immigrants-and-Opp-3.pdf>.

⁹United States Census Bureau Economic Survey, “Nonemployer Statistics by Legal Form of Organization and Receipts,” 2019, <https://data.census.gov/table?q=NS1900NONEM>.

¹⁰ United States Census Bureau Annual Business Survey, “Owner Characteristics of Respondent Employer Firms,” 2021, https://data.census.gov/table/ABSCBO2020.AB2000CSCBO?q=ab2000*&g=310XX00US42660&nkd=QDESC~O11.

¹¹ Washington State Dept of Commerce, “Keep Washington Working,” 2021, https://www.commerce.wa.gov/wp-content/uploads/2022/02/CommerceReports_20220125_OEDC_KeepWAWorking_Final.pdf.

social service strategies to support undocumented immigrants impacted by federal legislation. Recommendations from the 2021–22 annual report include the following:¹²

- Expand Keep Washington Working. Based at Highline College in Des Moines, the Puget Sound Welcome Back Center provides counseling and educational services to help immigrants practice their profession in Washington state.
- The Department of Commerce Small Business Resiliency Network builds on a trusted messenger model to provide critical small business development support to small businesses, including immigrant, refugee, and minority-owned businesses across Washington. As the Department of Commerce continues to expand this model, the Keep Washington Working work group encourages the department to explore how the program can be tailored to meet the needs of non-traditional workers (such as independent contractors and self-employed people).

Food Business Support/Entrepreneur Incubator Programs

There are valuable initiatives and resources within the study area that support small business entrepreneurs and owners.

Shared commercial kitchen spaces: In King County, there are as many as 90 formal and informal shared commercial kitchen spaces, with most being shared informally. Recent studies show that many of these kitchens have four or more businesses licensed in the same space. Most appear to be leased on an hourly basis.

Food business/entrepreneur incubator facilities and programs: While more than 60 incubators/accelerators exist across the western Washington region, few cater to small and mid-sized food producers, below is a list of regional resources that do so:

- **International Rescue Committee** in SeaTac provides immigrants and refugees with business-skills training and supports entrepreneurship through mentorship and technical assistance.
- **Project Feast** in Kent provides refugees and immigrants pathways to sustainable employment in the food industry.
- **Ventures** in south Seattle offers business training and commercial kitchen rental.
- **Food Business Resource Center (FBRC)** in Tukwila is a one-stop-shop for Washington state food entrepreneurs to access skills, resources, networks, and marketplace opportunities needed to start, run, and grow a successful food-related business.
- **Food Innovation Network** in SeaTac has a food business incubator program that helps entrepreneurs launch food businesses by providing training, mentorship, subsidized commercial kitchen access, and support with permitting, licensing, menu planning, and marketing.
 - **Spice Bridge** became home to Food Innovation Network’s food business incubator program, which supports under-resourced south King County residents, primarily women of color and immigrants. Food entrepreneurs can access a commercial kitchen, restaurant space, and a community hub.

In addition to the accelerator and incubator list above, there are a number of organizations that provide small business and entrepreneurial coaching among their services.

¹² Ibid.

Retail Analysis

Independent Food Establishments in the Market Area

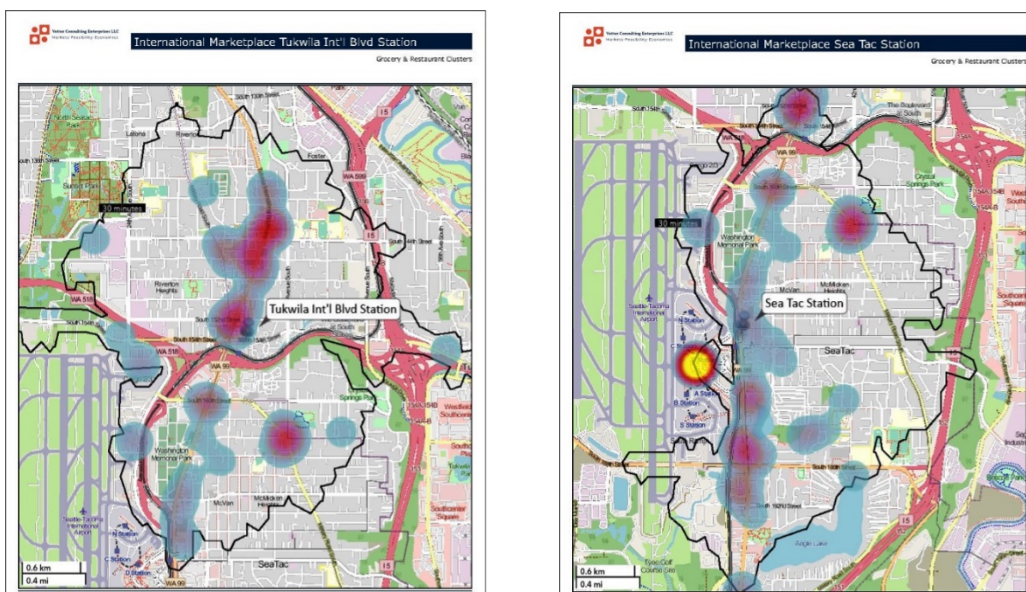
To assess the current market of retail establishments that might service a similar need to an IPM or the vendors that make up an IPM, NVA performed retail analysis to identify the locations, types, and the sizes (by employees and average annual sales) of current operators in the market. The retail analysis was conducted with the support of Vetter Consulting Enterprises, LLC.

All tables and charts in this section represent cumulative datasets based on a 30-minute walk time from both the SeaTac light rail station and the Tukwila light rail station. In Figure 3 below, the geographic parameters of these data sets are illustrated with a black line; Seattle–Tacoma International Airport is excluded from this retail analysis.

Geographic Density of Food Establishments

In Figure 3 below, two heatmaps are shown indicating the presence of independent food establishments within 30-minutes walking of the Tukwila light rail station (left) and SeaTac light rail station (right). Independent food establishments are non-franchised or chain food businesses that are in the category of either convenience, grocery, restaurants, or cafes.

Figure 4: Heatmaps of independent food establishments within 30-minutes walking of Tukwila (left) and SeaTak (right) light rail stations



In both maps, most of the food establishment clusters appear along International Boulevard with pockets of retail activity in smaller volumes visible in other locations as well.

Type and Size of Food Establishments

As seen in Figure 3 above, the two defined market areas overlap slightly. For the following section, overlap has been removed to keep the datasets separated by city and walk time, versus strictly walk time. Table 5 below shows the number of food establishments by dataset broken into independent convenience stores, ethnic food stores and markets versus independent full-service restaurants and cafes. At its most basic, this table confirms that some of the core services of an IPM are already represented in the studied region, and they are quite small

(number of employees and average annual sales). We see that SeaTac is home to more and larger restaurants while Tukwila is home to more profitable convenience stores, ethnic food stores, and cultural markets.

Table 5: Food establishments within 30-minutes walking of SeaTac and Tukwila light rail stations

	Convenience stores, ethnic food stores, markets (independent)	Full-service restaurants and cafes (independent)
SeaTac		
Number of establishments	10	24
Average # of employees	3	12
Average sales	\$450,000	\$786,059
Tukwila		
Number of establishments	10	15
Average # of employees	2.7	6
Average sales	\$651,111	\$383,500

Current Spending in the Market Area

To evaluate the market conditions surrounding retail spending in food establishments, NVA performed a gap analysis of the convenience/grocery and the dining out categories for the 30-minute walk time datasets around the SeaTac and Tukwila light rail stations.

Gap analysis compares the demand (spending by residents) against the sales in a specific region and category of spending. If the gap analysis shows that there is a “draw,” this means that there are more sales than there is demand in a given area; that is, there are people traveling to the region to spend money. In Table 6 (below) the gap analysis shows that all four datasets have a market draw. This is promising for an IMP as it indicates that people are already traveling to the identified regions to spend in both convenience/grocery and dining out categories.

The demand in the two geographic datasets are comparable, yet Tukwila shows a notably large draw in the convenience/grocery category. This indicates that the retail market for convenience or grocery items in Tukwila might not support more of this type of establishment. The same indications are not true in the dining category.

Table 6: Retail gap analysis for SeaTac and Tukwila¹³

SeaTac market areas leakage/draw by business type			Tukwila market areas leakage/draw by business type		
Convenience/grocery					
Demand (spending)	Sales	Leakage/draw	Demand (spending)	Sales	Leakage/draw
\$51,967,360	\$64,579,199	\$12,611,839	\$51,420,958	\$105,586,810	\$54,165,852
Dine-out					
Demand/spending	Sales	Leakage/draw	Demand/spending	Sales	Leakage/draw
\$25,983,196	\$42,002,206	\$16,019,010	\$25,833,655	\$42,824,780	\$16,991,125

¹³ Tourism Economics, An Oxford Economics Company. (2023). “Economic Impact of Tourism in Seattle 2022”. Prepared for Visit Seattle.

Projected Tourism Spending

A key component to the vision of the IPM project is attracting not only local shoppers but travelers and tourists as well. To evaluate the viability of attracting tourism and begin to estimate the projected tourism spending at an IPM NVA referenced a report prepared for Visit Seattle by Tourism Economics¹⁴. Using just the tourism spending data from 2022 and projecting forward, NVA considered the following important factors to make projections: proximity to Seattle attractions and day visitors versus overnight visitors. Additionally, NVA considered the categories of spending that overlap with the typical offerings of an IPM which include Food & Beverage, Retail, and Recreation (concerts, comedy shows, classes, etc.).

An IPM located outside of the primary tourist destination of a metropolitan region will require strong partnerships, marketing, and time to develop a significant consumer pull. Day visitors are more likely to visit a new market as they are more likely to be arriving by vehicle from surrounding areas and are likely to have previously visited the region and be looking for new attractions. With conservative estimates based exclusively on the 2022 tourism spending data prepared for Visit Seattle, NVA projects a potential of \$43,280 of the current tourism spending could be redirected towards an IPM in South King County with that number climbing to over \$4M after year three (assuming capturing 2% of overnight market and 16% of day visitor market).

It is important to note that new retail destinations require significant marketing efforts and time to develop a retail draw. In Phase 2 when sites are considered, proximity to Seattle-Tacoma Airport could be an important consideration as it has the potential to encourage travelers or those with overnight layovers to build in time for an additional stop on their way in or out of the region. Phase 2 of NVAs work will include financial analysis, which will consider these projections among other factors to assess financial viability.

Learning from other IPMs


International Public Markets can be designed in many ways to highlight the cultural and economic priorities of the region they are looking to serve. There are many exciting examples worldwide of what an IPM can be to the community it is a part of – offering a cultural, community, event, or retail center. Table XX highlights four examples representing diverse communities in Canada and the United States that share mission or community aims with this proposed project.

The examples highlighted include examples of municipalities supporting IPM projects from an operational standpoint, projects of varying sizes and economic impact, and highlight a variety of operating models that successfully showcase diverse retail and programmatic offerings.

¹⁴ Tourism Economics, An Oxford Economics Company. (2023). “Economic Impact of Tourism in Seattle 2022”. Prepared for Visit Seattle.

Table 7: IPM Case Studies

Case Study	Facility	Economic Impact	Operations
<p>Eastern Market, Detroit, MI</p>  <p>Key Takeaways: Large market with many vendors, many revenue streams, and a very high economic impact</p>	<p>Farmer's Market, Public Market, Incubator space, Food hub</p> <ul style="list-style-type: none"> • 125,000 square feet 	<ul style="list-style-type: none"> • 125 vendors/retailers representing a diverse mix of culture and ethnicities Each year, approximately: <ul style="list-style-type: none"> • 2M people shop & buy food at EM (40,000 visitors daily during peak season) • \$360M of wholesale food sold in EM • \$418M of meat sold • 1,300 permanently employed in EM food businesses 	<ul style="list-style-type: none"> • Managed by a nonprofit corporation • \$7.1M Operating Budget <ul style="list-style-type: none"> • Foundation and Grants (82.5%) • Rental (16.5%)
<p>St Lawrence Market, Toronto, ON</p>  <p>Key Takeaways: Large number of merchants spread through multiple facilities to increase impact. Project operation is City supported.</p>	<p>Public Market, Demonstration Kitchen, Art Gallery</p> <ul style="list-style-type: none"> • 111,458 square feet 	<ul style="list-style-type: none"> • 120 unique merchants Consists of 3 multi-use buildings <ul style="list-style-type: none"> • North Market: Saturday Farmer's Market, Sunday flea market, and rental space • South Market: specialty vendors, prepared foods, fresh produce; art gallery on 2nd floor • St Lawrence Hall: Retail businesses, rental space, and City offices/uses 	<ul style="list-style-type: none"> • Public asset managed by the Real Estate Services Division of the City of Toronto • Cost of current redevelopment of North Market is around \$116.3M, largely coming from city budget
<p>Essex Street Market, LES, NYC</p> 	<p>Public Market, Demonstration Kitchen, Gallery</p> <ul style="list-style-type: none"> • 37,000 square feet 	<ul style="list-style-type: none"> • 37 unique merchants • 2 restaurants • Includes a mix of over 10 different ethnic cuisines • Located within Essex Crossing, a development that includes 1,079 units of housing, half of which will be permanently affordable for low to middle-income households and senior citizens, a 15,000- square-foot public open space, a 	<ul style="list-style-type: none"> • Managed by New York City Economic Development Corporation • Offers vendors rent at below-market rates and aids build out their physical spaces

Case Study	Facility	Economic Impact	Operations
<p>Key Takeaways: Multiuse space supporting diverse merchants. Managed by Economic Development Corporation of NYC</p>		<p>rooftop urban farm, office space, and a diverse mix of retail and community space</p>	
<p>Market Square, San Antonio, TX</p>  <p>Key Takeaways: Multiuse space dedicated to cultural representation and education, city owned, and offers development opportunities to a moderate number of merchants. High volume of visitors drawn to events and cultural experiences.</p>	<p>Historic Mexican market and outdoor plaza</p> <ul style="list-style-type: none"> • covers 3 city blocks • hosts regular cultural events 	<ul style="list-style-type: none"> • 53 small business vendors at the market and 32 at El Mercado • Up to 24 working artisans and 13 food vendors on the outdoor plaza • More than 1.8 million people visited Historic Market Square between August 2022 and July 2023. In March and April alone, more than 600,000 people typically visit for Fiesta events. • Part of the heritage portion of San Antonio’s tourism industry which has \$2.5 billion in visitor expenditures, resulting in nearly 52,000 jobs and \$1.7billion in salaries and wages each year 	<ul style="list-style-type: none"> • City-owned • Managed by the Dept of Historic Preservation

Secondary and Retail Analysis Findings

The findings of secondary research point to the finding that many of the key components necessary for the success of an IPM exist locally: demonstrated retail sales, a diverse community of entrepreneurs and organizations dedicated to business development, and the potential economic impact of a multi-vendor market.

Primary Research

Methodology

NVA utilizes multiple tools to build a comprehensive understanding of the regional landscape. For this project, primary research subjects included potential shoppers, vendors, and the large network of organizations and municipal partners invested in the region. The project team and advisory committee heavily supported the development of outreach lists, identifying communities of interest, and opening lines of communication between NVA and research partners. This work would not have been possible without the efforts of the full research team and advisory committee.

It is important to state that this initial phase of research was not able to include every ethnic and cultural group represented in the region; there are still many perspectives to continue to be incorporated into this project through its development, establishment, and eventually its operation.

Primary research included interviews, a survey, site-visits, community events, and facilitated/translated discussions. Each of these tools were employed to learn from key partners and demographic groups in different ways to achieve the most well-rounded findings possible with the time and resources dedicated to this phase of research. Due to the

Interviews

The following is a full list of stakeholders interviewed. Fourteen interviews were conducted virtually between June 12 and July 14, 2023. Interviewees included city officials, entrepreneurs and small business owners, and social welfare program workers.

Table 8: Completed Interviews

Name	Organization
Abdirahman Omar	African Career and Resources Associates King County Department of Community Health Services
Hamdi Abdulle, Abokor Isaak	African Community Housing and Development
Aleksandr Yermeyev	City of SeaTac
Derek Speck	City of Tukwila
Faisal Mohamed	SeaTac International Mall
Hien Kieu	Partner in Employment
Mark Everton	Seattle Southside Regional Tourism Authority
Marwa Sadik	Iraqi Community Center of Washington
Medhi Jumale	Tawakal Supermarket and Zain Restaurant and Bakery
Peter Gishuru	African Chamber of Commerce of the Pacific Northwest, African Business Innovation Center
Samantha Le	Seattle Southside Chamber of Commerce
Shamso Issak	Living Well Kent
Maribel Pastor, Diana Hernandez, Nadia Melo	Villa Comunitaria
Jose Manuel Vasquez	Growing Contigo
Munira Mohamed	East African Community Services
Jessie Kotarski	City of Renton
Commissioner Hamdi Mohamed	Port Commissioner
Councilperson Dave Upthegrove	Councilperson, King County

Name	Organization
John Schofield	CuliNEX
Gary Hopkins	Mango Thai

Results and Analysis

The full interview synthesis can be found listed in the appendix as “Appendix A”. The following is a summary of themes pulled from all interviews conducted:

Need for a public market: Ten interviewees agreed that “yes” there is a need for an international public market. There was enthusiasm, around the concept of an IPM primarily to give a unified home to the many cultures the region can showcase. Themes in interviews included a thoughtfully curated space, strong considerations to support the success of the vendors (business support, language facilitation, training, etc.), diverse retail options and events for the customer, and resources to support the community. Interviewees identified grocery options as a regional need; halal was mentioned specifically several times.

When asked, interviewees envisioned a “global village” at the international market. They also hoped there would be synergy between all the businesses so that healthy competition and mutual thriving could be achieved. Types of businesses mentioned included food, arts, apparel, and technology.

Stated benefits of an IPM: Interviewees stated that an IPM could bring opportunities to the area to support the local economy, community building efforts, and social welfare. It would create more jobs in addition to enriching the cultural landscape and bringing new ideas of culture to the region, as it would be a space for gathering different groups together. A space to congregate resources would enable locals to find both their household needs and other socio-cultural needs in one place.

Interviewees expressed enthusiasm that an IPM would offer opportunities to invest in community businesses and make the region more popular to visitors.

Location: In interviews, individuals were asked what cities they thought would be suitable for a new IPM. There was a strong expressed interest in SeaTac as a potential market location (nine references), primarily because of the proximity to the airport and existing commerce on International Boulevard. Tukwila was also heavily cited as a potential location for an IPM, with six specific mentions.

When considering locations for an IPM, interviewees expressed the importance of modes of public transportation to make an international public market accessible. If airport visitors are a priority market, interviewees suggested transportation be provided to or from the airport or other popular gathering sites to ease access.

Existing regional programming: Interviewees referenced the Mall of Africa, Spice Bridge, and the former Bakaro Mall when asked about retail or programmatic offerings similar to an IPM. Interviewees highlighted that retail spaces already in existence are limited in that they primarily served a narrow audience and are not necessarily accessible or targeted to a broad retail market.

Important Considerations: The most common theme among interviewees was the importance of authentically advocating for the needs of the community and representing the cultures the IPM is designed to showcase. Suggestions to achieve this included ensuring that the development of the market is led and supported by people from within the community, building in considerations for vendor and shoppers language needs, and continually having community representation in decision making around IPM development and programming. **“Representation**

matters,” one interviewee said. For an IPM to be a truly international market, issues from within the communities represented must continue to be part of outreach efforts and decision making. It was also referenced that coaching or curation could help make the products accessible to an audience that is not familiar with cultures represented or items sold.

With regards to **business preparation**, many interviewed not only suggested that potential vendors will require coaching to scale their business to the appropriate size but offered that their organizations already provide this type of programming. **Language barriers** were frequently cited as an important consideration for business preparation. Interviewees were concerned about making sure that potential vendors who might not be comfortable in English have access to the tools to help them understand how to navigate the opportunities presented by an IPM in addition to the challenges of interacting with customers that might also speak a variety of languages.

The **affordability** of products and rental space will need to be evaluated closely. Interviewees explicitly stated that for an IPM to service both locals and tourists, a range of price points will need to be reflected. Additionally, to support the development of generational wealth among south King County residents, business ownership must be approachable. To encourage this, it was suggested that entrepreneurs would benefit from having an IPM in which there is a pipeline to growth, starting with affordable, regular vending opportunities and building toward long term, higher-capital retail spaces.

Customer demographics: One of the goals of phase 1 research was to evaluate both regional and tourism spending. When asked if they expected that a project like this could meet the needs of local shoppers in addition to attracting tourism, one interviewee said, “Without the traveler, it can’t be successful.” In many interviews, individuals stressed that they were enthusiastic about the opportunity to showcase the region’s diversity in a retail setting.

Communities to include: In every interview inclusion was a major topic, be that through language accessibility, research outreach methodologies, market development strategy, partnerships with community to ensure longevity, or authentic representation. The following is a list of languages, countries, or cultures that were explicitly mentioned in interviews as priorities to represent the region: Afghani, Algerian, Hmong, Vietnamese, Congolese, East African, Ethiopian, Iraqi, Mexican, Middle Eastern, Pakistani, Pilipino, Punjabi, Somali, Syrian, Latinx, West African. This list is not exhaustive, and while interviewee suggestions informed research methodologies, NVA, the Port of Seattle, and King County focused outreach on the broadest reach possible to ensure that all interested parties were invited to join the conversation.

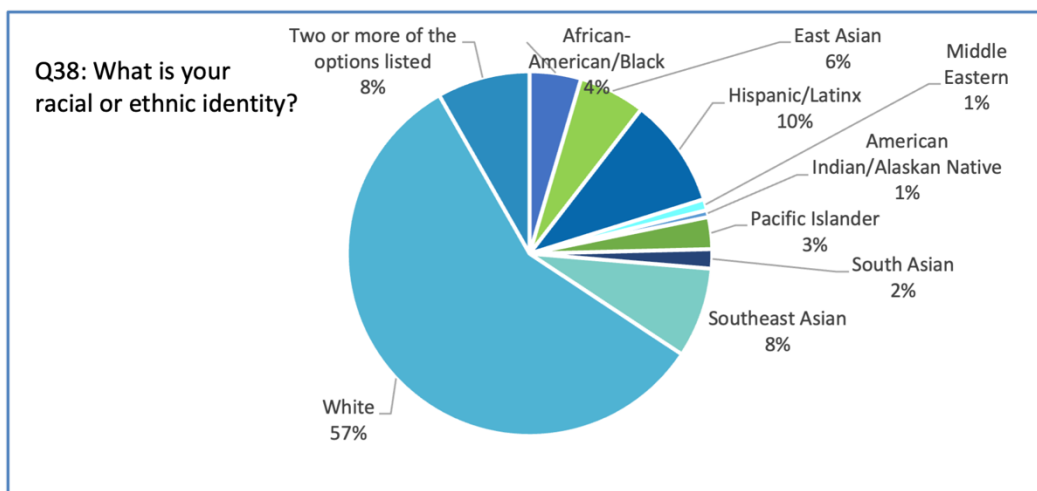
Surveys

With a large and diverse study area, it was important to build a survey that could reach as many south King County constituents as possible. To ease the distribution of the survey, a single survey was designed that asked participants to self-select which of the following applied most to them: the desire to make or sell goods at an IPM (potential vendors) or the desire to shop or attend events at an IPM (potential customers). All respondents were asked the same set of questions designed to determine market demand, shopping habits, and perceptions of an IPM. Those that identified as potential vendors were asked an additional set of questions pertaining to their business, vending needs, and infrastructure requirements. The survey was written in English and translated into Somali and Spanish; all language options were accessible using the same web link.

Initial interview findings showed that SeaTac and Tukwila were key geographic areas of interest. As a result, the survey language highlighted these two cities. It is important to note that in this phase of the international public market study there has not been a city or site located for this project.

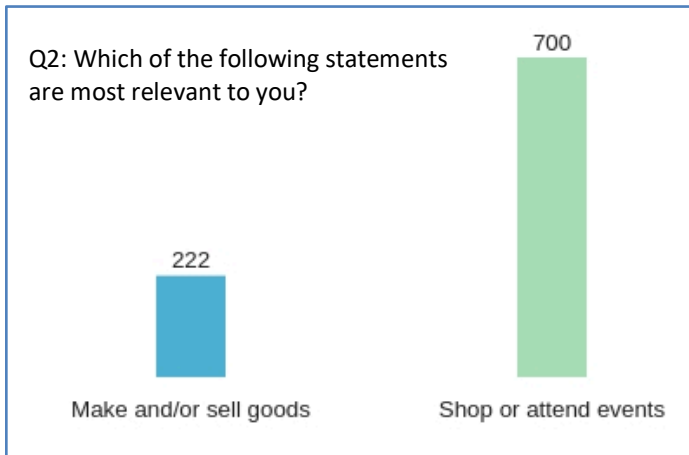
The survey was open between June 27 and July 31, 2023; in that time, a total of 928 responses were collected. At the beginning of the survey, each respondent was asked for their ZIP Code to help determine the geographic reach of the survey and proximity to potential future market sites. Respondents were predominantly from ZIP Codes identified as Tukwila, Seattle, and Burien, with significant responses also coming from SeaTac, Des Moines, and Kent. The racial or ethnic identity of survey respondents closely reflects that of King County as a whole (shown in Figure 5). A majority (60%) of respondents identified as female, and 75 percent listed themselves as being employed full-time. English was listed by 93 percent of respondents as being among the primary languages spoken at home; roughly 2 percent of the total responses included more than one language as the primary language spoken at home.

Figure 5: Racial or ethnic identity of survey respondents



When asked if respondents thought their community would benefit from having a new IPM in SeaTac or Tukwila, 88 percent of respondents answered positively. Looking strictly at the respondents from these ZIP Codes, 92 percent responded positively. Two hundred twenty-two respondents identified as potential vendors of an IPM, and 88 percent of them (196 people) identified that they make or sell a food product. It is notable that only 2 identified as current or future farmers, and 15 are future business owners that do not currently have a business but are looking to begin vending.

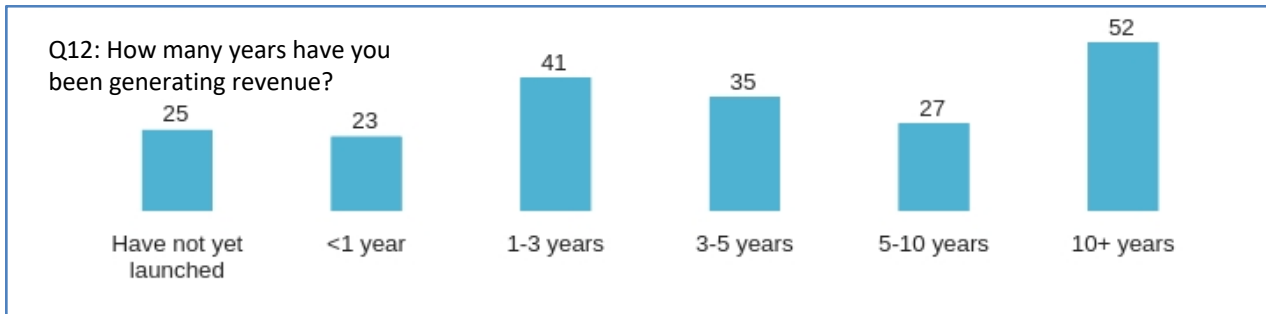
Figure 6: Respondent self-identification (vendor vs. customer)



Vendors

The majority of vendors identified as food businesses. Within that, most identified as a restaurant or a producer of ready-to-eat food items. Other trends include baked items (bread, pastries, etc.) and mobile vending (catering or food trucks). Most business did not list any specific licensing or inspection requirements, but there was a notable interest in halal production and certification. Of the non-food item businesses, 8 of 12 offer crafts or hand-made items as their primary product.

Figure 7: Years generating revenue (potential vendors)

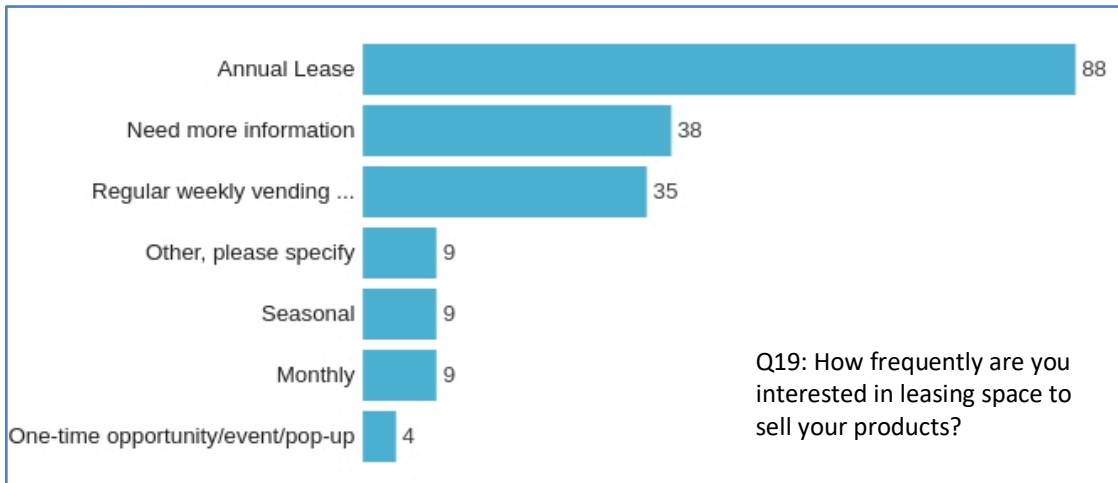


Potential vendors have been generating revenue for a wide range of years, but only 38 percent have been generating revenue for more than five years. After five years of generating revenue many new businesses are considered to be more established, these numbers indicate that the potential vendors interested in an IPM are still relatively early in their development. Most vendors are also operating year-round.

Vendors are predominantly vending from their own stores or homes; many are also vending at special events (festivals, markets, etc.) or utilizing online sales. Of the vendors making their own products, most are producing out of owned or leased space, some of which was specified as a shared commissary or commercial kitchen.

Vendors report that labor is their primary barrier to growth, followed by access to customers, production space, and equipment.

Figure 8: Desired vending frequency



The most desired vending frequency is an annual lease, but there is a mix of interest in shorter term leases in addition to special event vending opportunities.

Among surveyed vendors, there is interest in space to make products, specifically kitchen space, but more information is needed. Additionally, storage (cold, dry, and frozen) was identified as desirable for potential vendors.

Customers

Survey respondents were asked which factors they would value in an IPM (see Table 9 below). **Freshness of the products and supporting a diverse range of business owners** were top priorities to a majority of respondents. The affordability of products as well as being able to shop for a variety of options were also a notable priority among potential customers. Neither walkability from respondents’ neighborhood nor SNAP/WIC eligibility were among respondents’ priorities. Most parties were neutral about products specific to their culture or heritage, but nearly equal amounts of people identified this as “not important” and “very important.”

Table 9: Factors that would make an IPM an ideal place to shop

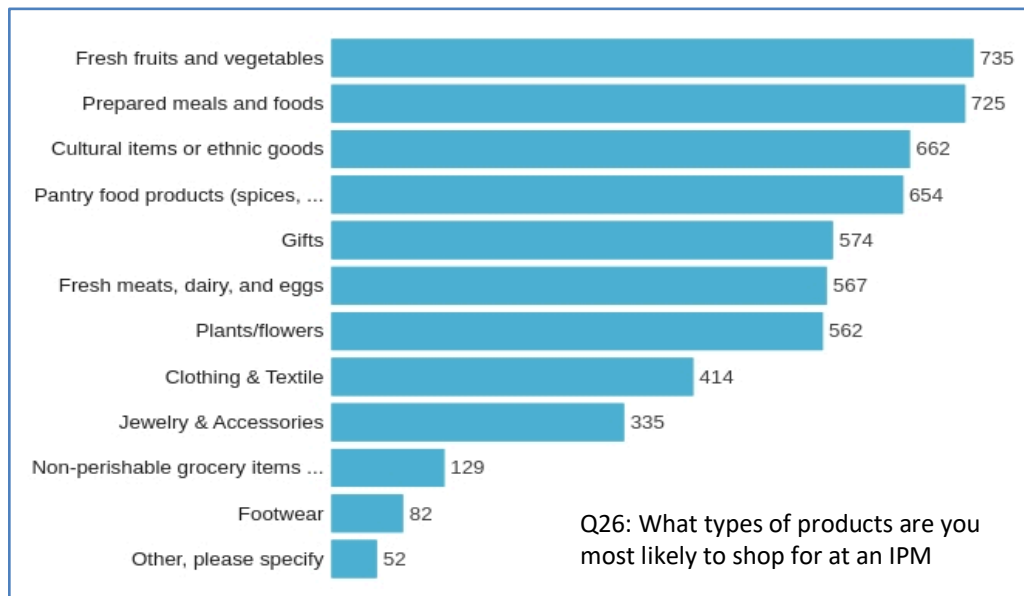
What factors would make an IPM ideal to shop? (Q23)	Not Important	Somewhat Important	Neutral	Important	Very Important
<i>SNAP/WIC eligibility</i>	199	45	412	148	141
Hosting community events	41	71	302	320	211
Hosting classes	90	98	421	225	111
Affordability of the products	22	98	291	334	200
Freshness of the product	6	17	150	280	492
Products specific to my culture/heritage	144	56	397	184	164
Shops run by vendors who are a part of my community	40	51	260	305	289
Supporting a diverse range of business owners	18	29	190	234	474
<i>Walkable from my neighborhood</i>	208	102	390	130	115
Hours of operation	16	72	312	372	173
Offering a variety of options	7	25	188	378	347

Additionally, respondents identified that food stalls and restaurants were most likely to attract visitors ut a variety of vendors would be crucial to a well-rounded consumer experience. In additional to retail opportunities, 459 respondents (more than half) also listed an interest in gathering space.

Because attracting tourism was identified as a goal of this project, the survey also asked respondents what would make them visit an IPM in another city. Food was mentioned as a top attraction in addition to a unique experience, local vendors, events, quality of goods, and parking.

Potential customers are **likely to attend events** at an IPM, and in an open-ended question, the most volunteered types of events included cooking classes, cultural events, crafts courses, and music-based events. There is limited, but still significant interest in hosting events (103 individuals) and of the events respondents are interested in hosting, cooking classes were the most common.

Figure 9: Products respondents are likely to shop for



The products respondents are most likely to shop for are **food items** (fresh fruits and vegetables as well we prepared meals and foods). Cultural items, grocery, and gifts were also very appealing to potential shoppers.

The reported frequency that customers would shop at an IPM varies, which is important to developing a steady customer base. Predominantly, respondents identified that they would shop once a week, with many stating that they would shop once a month or every two weeks. Collectively, potential customers reported **regular** shopping frequency. Personal vehicles were the most selected transit modality to access an IPM, followed by public transit.

Survey respondents were asked what an ideal location for a market would be. This open-ended question encouraged respondents to input specific neighborhoods, streets, or addresses. There were 661 responded to this question, which is a high response rate for a write-in style question. Table 10 shows the number of times a specific city was referenced, Tukwila was the most commonly listed city. Other common responses included proximity to the light rail or public transit, safe locations, indoor/covered spaces to accommodate weather, and sites with ample parking.

Table 10: Write-in preferences for IPM location (city)

Write-In City Suggestions	#
Tukwila	145
Burien	71
SeaTac	64
Renton	55
Rainier Beach	24
Des Moines	20
Kent	15

To assess how an IPM would fit into current offerings, the survey asked respondents what they believe the nearest overlap in services regionally would be. The most cited overlap was farmers markets (85 people), and Spice Bridge (50) and Pike Place (36) were listed as specific businesses of note.

Full survey response reports can be found in the appendix. The comprehensive King County responses are listed as “Appendix B” and the SeaTac and Tukwila zip code respondents only are listed as “Appendix C”.

Site Visit

To assist in the feasibility study research, NVA spent three days on-site in south King County to conduct in-person research and interact with the study region. In that time NVA conducted in-person interviews, took guided facility tours, visited markets, grocery stores, international malls, and other establishments that represent marketplace examples of similar ventures or infrastructure and participated in community events to inform the study.

Tabling: While in south King County, NVA requested to participate at the Spice Bridge Farmers Market and SeaTac Music in the Park event. The purpose of these visits was to interact with potential customers to learn about IPM familiarity and interest, potential needs, and to market the survey.

The Spice Bridge market offered the opportunity to connect with people shopping for food, picking up free meals, and shopping for produce with vouchers. There were many languages and ages represented at this market; having a public presence at an event like this allowed NVA to speak to individuals that might not have been reached otherwise, and many of the conversations were interpreted by family members.

The Music in the Park event hosted by SeaTac in Riverton Heights Park was an opportunity to speak with families and groups of friends in the SeaTac area. Three individuals at this event stated that they had already seen and completed the survey.

At both events, NVA observed that groups were primarily arriving by car.

Site visits: Interviews and secondary research helped produce a list of markets, grocery stores, international malls, light rail stations, city centers, and areas of interest. While on-site, NVA visited eight retailers, three city centers, two light rail stations, and several other notable areas of interest.

NVA observed that most retailers offer parking, regardless of proximity to light rail stations. While sidewalks exist in the more populated city areas, pedestrian traffic was limited. International malls in the area are home to many vendors, but the range of products is limited to three to four primary types of vendors. Many ethnic grocery stores or convenience stores also offer a small menu of food items, but there are not many food courts or food halls that offer a variety of food and retail options like an IPM would.

With Seattle–Tacoma International Airport as a notable area of interest, NVA walked the light rail station and the surrounding streets and parking lots in addition to driving the adjacent length of International Boulevard. There is a heavy concentration of hotels, several airport affiliated businesses, and some food establishments. There are not a lot of available sites in this dense area, but there are existing transit routes including bus and light rail that travel north and south.

Facilitated Discussions

Since interviews were predominantly with organizations, facilitated discussions were an important opportunity to speak directly with current and future business owners. In interviews NVA learned that many of the cultures represented in the region are verbal cultures and, with that, people would likely benefit from being interviewed in their native tongue. With the support of two partners, Living Well Kent and Saadia Hamid, two facilitated discussions were hosted at the end of July: one in person and one virtually.

Each facilitated discussion had a list of questions that was translated by an interpreter and delivered either individually or in a group session. Language facilitators shared their notes, and NVA synthesized the findings.

Facilitated discussions took place with a total of 32 participants. The languages represented were Arabic, Punjabi, Spanish, Somali, Amharic, Tigrinya, Tigre, and Oromo.

Vendors represented: There was a range of business types represented at the facilitated discussions. Roughly half operated or planned to operate a food business. The other half was a mix of services (henna artists, clothing makers, furniture makers, day care operators) or individuals hoping to start a business. Most reported a small volume of current sales with production and sales happening from home or at special events. Most vendors are looking for a regular vending opportunities (a long-term space that allows for daily vending).

Vendor needs: In conversations with vendors NVA found first and foremost that vendors are looking for support in gaining access to a new and larger customer base. While many reported that navigating the licensing process was challenging, primarily due to language barriers, many also reported that they are aware of organizations that can support them with these steps. The cost and limited availability of retail space was commonly expressed as a barrier.

Research Summary and Takeaways

Market Demand

There is a clear market demand for an IPM, with over 80 percent of survey respondents expressing that they believe SeaTac or Tukwila would benefit from a **new** international public market. Roughly one-third of respondents expressed an interest in vending at an IPM, which is statistically significant for a region this size, though businesses are relatively small and early in their careers. While research identified many interested vendors, a successful market will need a diversity of vendor types and sizes; it will be important to find larger, well-established vendors as well as providing business development support to entrepreneurs.

There is a strong overlap between what consumers identified as their priorities and the vendors that expressed an interest in an IPM. Consumers are primarily interested in shopping for food items (fresh and grocery items as well as meals). Most potential vendors (82%) identified as food-vendors offering mostly prepared foods (restaurants, caterers, baked goods, deserts, etc.) with a small representation of grocery/retail operators.

Research respondents are enthusiastic about a market in Tukwila and have interest in Burien, SeaTac, and Renton as well. Parking, safety, and access to public transit were notable desired site features.

Offerings and Benefits of an International Public Market

Vendors: If we compare the barriers to growth that vendors reported against the features of an IPM, there is a lot of overlap. In surveys, facilitated discussions, and interviews, vendors repeatedly identified that they would like support gaining access to customers. IPMs offer a strong customer draw by offering a range of products, services, and experiences that not only appeal to broad audiences but also give people reasons to return. Additionally, potential vendors expressed that finding retail space is a great challenge for them due to limited space and the cost of renting. Retail space in a shared location can often be more affordable because management, utilities, and other expenses are shared among many vendors.

Staffing is a national challenge, and it was expressed by many vendors that finding labor is a barrier for them. IPMs offer businesses consistent vending opportunities, which in turn makes them attractive employers. Some IPMs also see shared staffing models to support businesses that might not be able to offer full-time employment and wish to offer their employees a consistent schedule and workplace.

IPMS offer a variety of different retail spaces with different lease terms, sizes, and financial demands. With the number of early-stage businesses NVA interviewed, this flexibility and the opportunity to test out a business without a full-time lease could support sustainable growth versus exponential growth that can be hard to maintain.

Additionally, a theme among vendors and organizations was that an IPM would need to provide business coaching to support vendors as they grow and provide them the tools they need to interact with a broad and diverse audience. An IPM with many vendors makes a perfect location to host courses and trainings and allows the opportunity not only for formal learning but also for mentorship from established businesses vending at the market.

Community: The research shows that community members are looking for a community space to gather and learn. IPMs are typically built with a common space that is flexibly used for dining, gathering, and learning. In this way, an IPM is a great community gathering space. These spaces can be used to achieve some of the human services that the research identified as a priority like language classes, job fairs, trainings, and courses.

From a cultural representation standpoint, NVA heard through many channels that people are looking for spaces that showcase the regional diversity and provide opportunities to learn. IPM programming is strongest when a diversity of vendors is represented. Prioritizing a diverse range of businesses and cultures strengthens the draw of an IPM and provides the opportunity to host a broad range of cultural events like cooking classes, dance classes, and craft markets.

Market Landscape and Indicators

To consider the viability of a retail market in south King County, it is important to investigate the potential market share. NVA's retail analysis focused on walking zones around the SeaTac and Tukwila light rail stations and of the four datasets (0–15 minutes walking, 15–30 minutes walking from each light rail station) three have a smaller

daytime population than overall population. This means that people are leaving these areas during the day and indicates that a market would need to **attract daytime visitors** to this area.

Given that food is a major priority for consumers (and a highly represented vendor demographic), NVA looked at the retail demand and spending on convenience/grocery and dining out to consider what commerce is already taking place in the region. In each category there are more sales than there is a demand, which shows that there is a market draw to this area. This is promising as it shows that **people are already traveling to these areas for this type of spending**.

When we consider tourism spending, NVA's retail analysis focused primarily on Seattle tourism data provided by Visit Seattle to make industry-supported assumptions about spending. For an IPM outside of a major city center to attract tourism, **marketing and outreach must be a major priority**. It is also important to consider that tourism spending might likely come from regional tourists that visit the area often and are looking for new attractions versus first-time visitors that might be more likely to focus their travel time closer to Seattle.

The highlighted market region of SeaTac and Tukwila are already home to food businesses, but many of them small with low average annual sales. SeaTac is home to larger restaurants, and Tukwila has more profitable convenience stores and cultural markets. There is no direct overlap in offerings in either area, and with a mix of local shoppers and tourism, there is potential that this market could draw more retail spending to the region.

Phase 2 of NVA's work will take a closer look at the financial implications of a market.

Important Considerations

Language considerations: When considering an international public market in south King County, it is important to acknowledge that both potential vendors and shoppers might encounter language barriers to interacting with the market. In the NVA research, it was clearly identified both by individuals and by organizations representing population groups that accommodations for language barriers would need to be considered at every step of the way.

Inclusivity: In Phase 1, NVA was not able to engage with all represented cultures and ethnicities in the region. As part of the continue efforts to design, build, establish, and eventually operate an IPM, a dedication to representation and inclusivity must be maintained at the core of all outreach and development. Establishing long-term relationships with local partners and organizations will support the authentic and inclusive representation of the region. Strategic partnerships and the continued support of the Advisory Committee can help manage and maintain inclusivity through the development of an IPM.

Business pipeline development: Due to the high engagement from early-stage businesses, building a pipeline of businesses at various stages of readiness will benefit the long-term success of an IPM. Partnerships with local organizations that can guide the sustainable development of local entrepreneurs will build a pipeline of strong local businesses. In addition to building into the local entrepreneur network, a successful IPM will benefit from building connections with established regional brands that can act as anchor tenants to attract customers and establish a model for operator success.

Consumer education and marketing an IPM: A large part of NVA's research work involved educating participants about what an IPM can be. A pivotal tool to integrating into the existing economy to support local businesses and attract new shoppers to the region will be education and marketing around the IPM. Cornerstone to an IPM model is offering a wide range of entry points for consumers, retail, education, events, grocery, and so on. The current perception locally is that a farmers' market is the closest comparison for what an IPM can provide to a community.

It will be important for the long-term success of an IPM that the distinction between existing retail operations and the mission of an IPM be clearly communicated.

Partnership Opportunities

For the longevity of an IPM, it will be crucial to engage a strong list of community partners as collaborators. Intentional community partnerships will yield stronger connections to the local consumers, authentic representation of the regions' diverse population, and yield more successful support services. Many organizations enthusiastically referenced their existing programming designed to support individuals as they grow their businesses. While many IPMs offer courses to the public, this IPM has the potential to distinguish itself from other models by prioritizing local partnerships and integrating their robust offerings into the market's development.

Conclusions and Next Steps

Conclusions

The above findings were presented to the Advisory Committee on September 8th, 2023. The analysis presents a viable argument for an International Public Market. There is significant support for an IPM in South King County, and there is a match between the expressed desires of consumers and the needs of vendors.

There is interest in retail/food retail spaces, community spaces, placemaking spaces (gathering), and vendors to support those interests. Businesses expressed a need for business support services to support their growth, and a number of regional organizations identified these as being among the services they offer. And there is a strong desire for authentic cultural representation through vending opportunities and educational or community-focused classes and events.

Phase 1: Market Feasibility

This initial phase of the feasibility study is designed to assess the first lever of feasibility, which includes identifying community needs and objectives and whether they align with the proposed project's objectives and potential outcomes. The analysis and outreach conducted identified clear community interest in and support of the proposed IPM. The potential space needs, community access points, and programs/services that community individuals and groups identified as being of value all align with the potential contributions of an IPM to the regional market.

The next steps, outlined below, will address the remaining two levers of feasibility, operational viability, and financial viability, via modeling and site analysis.

Next Steps: Phase 2

Moving into this next phase, the focus of the study will be to validate assumptions built on analysis conclusions to support the development of a full concept model with operational, design, and financial modeling tools.

This phase of work will include assessing market attribute via a site analysis to begin to determine the size of the proposed market, scope of operations, and related considerations for infrastructure requirements as well as implications that impact the design and infrastructure of an IPM. This portion of the continued analysis includes the development of concept visuals and tenant strategy and recommendations.

Phase 2 proceeds with a thorough site analysis (including the review and identification of potential sites in the region) and initial operational modeling which will include a second site visit by the NVA team. This step will be followed by financial modeling at which stage a preliminary budget model (cost model) for the facility will be developed along with proforma operating projections to support the concept models. These phases are expected to be completed in early 2024 and will be followed by a final stage to include recommended funding approaches, management suggestions, and an implementation plan.