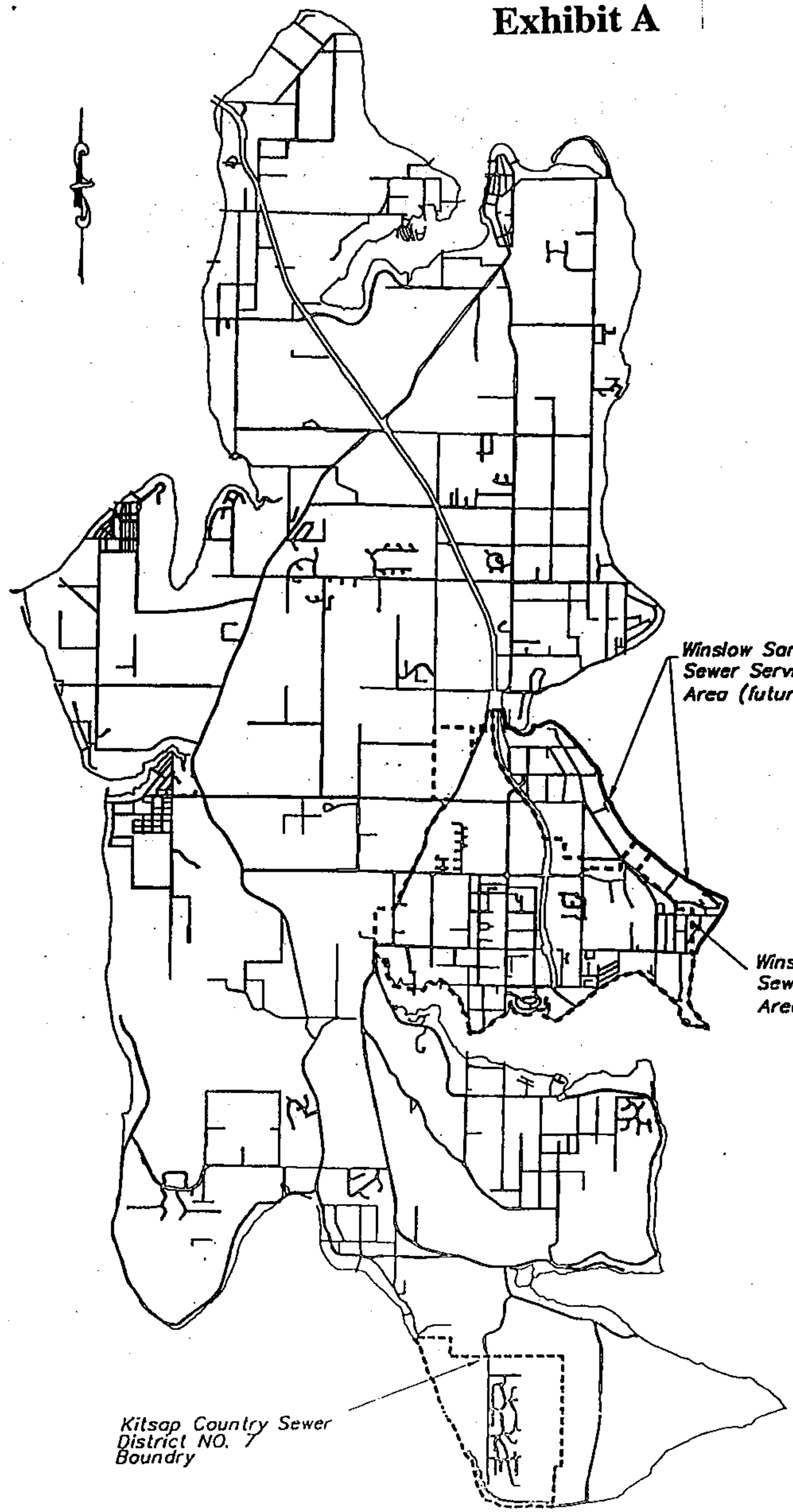
Appendix D - Capital Facilities

2. April 29, 1998, Memo from William Bryan re. Wyatt Way/Knechtel Way ROW Cost Estimates.

Exhibit A



City of Bainbridge Island
Sewer Service Areas

City of Bainbridge Island
PUBLIC WORKS DEPARTMENT
Phone 206/842-2016 FAX 206/780-3710

MEMORANDUM

CITY OF
BAINBRIDGE ISLAND
MAY 01 1998
DEPT. OF PLANNING & COMMUNITY DEVELOPMENT

TO: Jane Allan
Planning & Community Development

FROM: William A. Bryan, P.E.
Director, Public Works

DATE: April 29, 1998

RE: Wyatt Way/Knechtel Way ROW Cost Estimates

Jane - per your request the information I provided you verbally for the Winslow Master Plan is as follows;

Wyatt Way - For the 7 parcels - $156,000.

Knechtel Way - For the 13 parcels, $415,000.

There are so many variables in this ROW calculation that to be able to properly compare, I used the following assumptions

- A 60' ROW is required in either case, from SR 305 to Madison Avenue. If it is proposed for only SR 305 to Erickson Avenue, I have the numbers and can easily provide those to you. I felt if it went only to Erickson, there would have to be other considerations so I calculated the ROW costs through to Madison.
- For commonality of comparisons, I used the Kitsap County assessed values for the full market value of the parcel, including land and improvements.
- This estimate cannot provide a "damages" costs which will affect some of the parcels, nor does it address some of the unique construction features such as Wyatt Way having to cross the ravine.

WINSLOW MASTER PLAN
ECONOMIC ANALYSIS

Analysis of
Market Conditions

May 1996

Prepared By
Property Counselors

Table of Contents

List of Tables and Figures

I. INTRODUCTION AND SUMMARY

INTRODUCTION

The City of Bainbridge Island is preparing a Master Plan for Winslow as an amendment to its Comprehensive Plan. The City's goal is to enhance Winslow as a vibrant pedestrian-oriented mixed-use town center. The master plan process includes an economic analysis element which will provide an understanding of the trends affecting development of various uses in Winslow, will evaluate site-specific development opportunities, and will recommend regulatory approaches and incentives that can increase the likelihood of plan success. This report documents the market analysis which addresses the issue of understanding the trends affecting the demand for future development. The scope of the market analysis includes an evaluation of current local conditions, an analysis and comparison of conditions in other communities in the region, and projections for potential demand by use.

This report is organized in five sections:

I. INTRODUCTION AND SUMMARY
II. EXISTING CONDITIONS
III. REGIONAL EXPERIENCE
IV. PROJECTIONS OF FUTURE DEVELOPMENT
APPENDICES

The findings and conclusions of the analysis are summarized below.

SUMMARY

EXISTING CONDITIONS

The population of Winslow represents approximately one-quarter of the total population of Bainbridge Island. The household characteristics of Winslow differ from those of the rest of the island. Almost 40% of the housing units in Winslow are multifamily compared to 13% for the island as a whole, and the average household income is $56,200 compared to $70,700 on the rest of the island. These differences are consistent with Winslow's role as the more dense community center. In absolute terms, Winslow has experienced healthy rates of population growth and has high incomes.

Of the 1,300 multifamily dwelling units on Bainbridge Island, approximately two-thirds are apartments. Few of the apartment buildings have more than 40 units. The overall vacancy rate for the largest buildings is approximately 5%. Average rents for onebedroom and two-bedroom/one-bathroom units are $510 to $575 per month, and for two-bedroom/two-bathroom units are $950 to $1,015 per month. Condominiums in Winslow fall into two general categories: waterfront or view condominiums with 1,500 to 2,000 square feet or larger, selling for $200,000 or more, and less expensive units with 1,000 to 1,500 square feet, selling for $120,000 to $170,000. Using typical definitions of affordable in terms of prevailing income levels, current rents in the area do not exceed affordable rents of $810 per month for a two-bedroom unit, but sale prices exceed affordable levels of $115,000 in most existing condominiums and single-family homes.

A current commercial area inventory identifies approximately 750,000 square feet of commercial development.

Office	272,000 square feet	(36%)
Retail	282,000 square feet	(38%)
Service	54,000 square feet	(7%)
Restaurant	42,000 square feet	(6%)
Other (Institutional)	100,000 square feet	(13%)

The average building is 5,600 square feet. The average business is 1,900 square feet. Sixty percent of businesses are located in offices. Approximately 50% of estimated island household spending leaks off the island (on a net basis). While it is unrealistic to expect island businesses to increase their shares in retail segments served on a regional basis, there is potential for increases in local serving segments.

Office market conditions in Winslow indicate low vacancies (about 2%) and an absorption rate of 10,000 square feet per year over recent years and average rents in newer buildings of $1.50 per square foot per month, fully serviced. Office tenants are typically small but include both local-serving businesses and regional-serving businesses which choose to locate here because owners either live on the island or like the character of the area.

There are three general types of retail buildings in Winslow: older retail buildings, newer specialty malls, and the shopping center anchored by Safeway and PayLess. The older buildings offer rents of $10 to $13 per square foot per year, partially serviced, while the newer buildings offer space at $14 to $20. The major retail businesses are Safeway, Thriftway, PayLess, Lumberman's building materials, and Ace Hardware.

REGIONAL EXPERIENCE

Winslow is located in Kitsap County in the Central Puget Sound region (King, Kitsap, Pierce, and Snohomish Counties). King County is the dominant county of the four with 55% of the regional population in 1990 and 67% of the jobs. The region is projected to grow by 46,000 persons per year between 1990 and 2020. Kitsap County's share of regional population is projected to increase from 7% to 8% by 2020. The county will continue to be a net exporter of residents to jobs.

As the major employment center in the area, downtown Seattle represents a daily destination for residents throughout the region. Downtown employment is projected to grow by 30,000 workers over the next 20 years. According to a recent survey of downtown Seattle employees, the largest occupational category is professional/technical with 33.5% of total employment. Secretarial/clerical had been the largest category five years earlier. There is a wide range of income levels, with one-quarter of workers with household incomes below $25,000 annually and 20% greater than $75,000 annually.

Winslow can be compared to other communities in the region. Beyond the first tier of areas around the Seattle Central Business District, existing communities are mature and largely built-out; Winslow can compete effectively in terms of commute time with these areas. Winslow has a small and specialized downtown by regional standards, but it is similar to other waterfront communities in terms of level of employment and scope of its businesses. Winslow offers an opportunity to provide a more balanced distribution of incomes than either the close-in Seattle communities or the other waterfront communities in the region.

PROJECTIONS OF MARKET DEMAND

The projections of future market demand and potential development are intended to provide a basis for evaluating alternative plans and actions for achieving plan objectives for density increases, affordable housing, and transfer of development rights The projections also serve to identify the relationship between actions, associated forecast assumptions and outcomes.

The City of Winslow projects island-wide population growth of 7,430 people over the 20-year period ending 2012. The City's goal is to accommodate one-half of that growth, 3,715 people, in Winslow. The associated growth in housing units would be 1,456.

Housing demand in Winslow would be strong enough to meet or exceed these projections based on potential demand in two market segments: commuter to downtown Seattle jobs and island residents moving from single-family dwellings. This potential demand will depend upon Winslow's maintaining and enhancing an attractive physical setting, and on the island's offering an attractive and affordable alternative to built-out close-in Seattle neighborhoods.

Office development in Winslow is not likely to exceed the recent historical average absorption rate of 10,000 square feet per year. Winslow would continue to accommodate businesses serving local residents and businesses serving larger market areas but which choose to locate here for non-business reasons.

Potential retail demand in Winslow will result from three major roles:

- retail center for residents in the downtown area itself

- retail center for the entire island
- specialty destination for visitors from elsewhere in the region.

The second role provides the greatest source of potential demand, representing approximately 12,000 of a potential 16,000 square feet of annual absorption.

II. EXISTING CONDITIONS

The existing economic and market conditions in Winslow and Bainbridge Island provide a point of reference for evaluating alternatives for the future, as well as information useful in projecting the future conditions. Relevant current conditions include economic and demographic conditions as well as real estate market conditions.

ECONOMIC AND DEMOGRAPHIC CONDITIONS

Winslow currently serves at least two significant roles in the local and regional market area:

- It is the commercial center of an island-wide trade area.
- It is the western terminus of a ferry route linking downtown Seattle with the Olympic Peninsula.

Given those roles, Winslow is affected by both conditions on Bainbridge Island and conditions throughout the region. The latter conditions are addressed specifically in the next chapter of this report. The conditions on Bainbridge Island are addressed here.

Table 1 presents information on population and housing in the Winslow Forecast Analysis Zone (FAZ) and the entire island. The Winslow FAZ as defined by the Puget Sound Regional Council (PSRC) is somewhat larger than the historic City of Winslow (prior to annexation of the remainder of the island). The population of the FAZ was 4,037 in 1990, compared to 3,081 for the historic City. Population in the FAZ grew at a rate of 2.8% per year between 1980 and 1990. Rates for the same period for the entire island are slightly lower. All of these rates indicate strong growth.

The number of households in Winslow and on the island have grown faster than population between 1980 and 1990. As a result, the average household size dropped. As shown, the average household size for the island as a whole exceeds that for Winslow.

The makeup of the housing stock also differs between the Winslow FAZ and the island as a whole. As shown, multifamily housing's share of total housing units for the island as a whole is relatively low and actually declined between 1980 and 1990. The multifamily share in Winslow is considerably higher and grew between 1980 and 1990.

Table 1
Winslow Area and City of Bainbridge Island Population and Housing

	1980	1990	Avg. Annual Growth
POPULATION			
Winslow FAZ	3,055	4,037	2.8%
City of Bainbridge Island	12,314	15,846	2.6%
HOUSING			
Winslow			
Single-Family	822	1,152	
Multifamily	463	721	
Total	1,285	1,873	3.8%
City of Bainbridge Island			
Single-Family	3,888	5,322	
Multifamily	651	812	
Total	4,539	6,134	3.1%
MULTIFAMILY AS % OF TOTAL			
Winslow	36.0%	38.5%	
City of Bainbridge Island	14.3%	13.2%	
AVERAGE HOUSEHOLD SIZE			
Winslow	2.31	2.12	
City of Bainbridge Island	2.67	2.55	

FAZ: Forecast Analysis Zone
Source: Puget Sound Regional Council, Property Counselors.

The income levels of households also differ between Winslow and the island as a whole. As show in Table 2, the average household income for Winslow was $56,745 in 1993, 20% below the average income of $70,700 for the island as a whole. Each figure exceeds the average of the Central Puget Sound region (King, Pierce, Kitsap and Snohomish Counties) and Kitsap County only, with average household incomes of $51,675 and $46,995 respectively. Table 2 also shows the distribution of income according to the quartiles for the region as a whole. The income limits for each quartile are defined such that 25% of the households fall into each interval for the region as a whole. For any subarea, a percentage greater than 25% means there are relatively more households in that income quartile than the region as a whole. For example, 26.9% of Winslow households are in the low income quartile, indicating relatively more such households than in the region. Conversely, 37% of households on Bainbridge Island are in the upper quartile, indicating significantly more households in this category.

Table 2
Winslow and City of Bainbridge Island Income

Distribution of Household Income	1980	1990	1993
Winslow FAZ			
Low	26.8%	26.9%	
Low Middle	26.2%	24.9%	
Upper Middle	22.5%	22.7%	
Upper	24.6%	25.5%	
City of Bainbridge Island			
Low	18.0%	18.7%	
Low Middle	19.8%	19.6%	
Upper Middle	25.1%	24.7%	
Upper	37.0%	37.0%	
Average Household Income			
Winslow			$56,745
City of Bainbridge Island			$70,700

Source: Puget Sound Regional Council.

HOUSING AFFORDABILITY

Income levels determine whether local households can afford housing in the community. Affordable housing can be defined in many different ways. Affordability is often defined in terms of eligibility for housing assistance under various programs of the U.S. Department of Housing and Urban Development (HUD). A common definition is housing which is affordable to very low, low, or moderate income households - those with annual incomes less than 80% of the median income for the metropolitan area. The median income for Kitsap County as identified by HUD is $44,900. A moderate income family of four is one with income less than $35,900 (80% of the median). A moderate income family of three is one with an income of less than $32,350.

HUD uses a factor of 30% to determine the portion of a family's income which is typically spent on rental housing (including utilities). In the case of purchased housing, 25% of income can go for principal and interest. Using these definitions, the affordable rents and purchase prices for a two-bedroom housing unit can be calculated as follows.

Affordable Rent:	
30% of Income	$809 per Month Rent
Affordable Purchase:	
25% of Income	$674 per Month Principal & Interest
Mortgage (30 years @ 8%)	$91,800
Down Payment (@ 20%)	23,000
	$114,800

The affordable rent is higher in comparison with market rents in Winslow, but the affordable purchase price is lower than prevailing prices for most new construction.

SUMMARY

Overall, it is clear that the demographic characteristics of Winslow differ from those of the island as a whole. However, conditions in Winslow are strong in absolute terms, with healthy rates of population growth and high incomes. The differences between Winslow and the remainder of the island reflect Winslow's role as the more dense community center, while the balance of the island is largely upper income single-family residential.

COMMERCIAL INVENTORY AND BUSINESS MIX

While regional and local planning data offer reasonably current estimates of population and housing, data on commercial development is collected infrequently or is available only in larger metropolitan areas. We conducted a survey of buildings in the Winslow commercial core as part of this study. The results of the inventory are summarized in Table 3. The complete inventory is presented in Appendix A.

Table 3 is arranged geographically according to the major streets. As shown, total development in the commercial areas is estimated to be about 750,000 square feet. Office and retail uses each represent about 37% of the total space. Service businesses—including such uses as dry cleaners and animal hospitals—represent 7% of the total; restaurants represent 6%; and other uses, primarily government, churches or other institutions represent 13%. There were 133 buildings (excluding single-family residences) in total, indicating an average building size of 5,600 square feet. This number is consistent with the obvious impression that the existing commercial development is small in scale.

Table 3
Downtown Winslow
Commercial Inventory - 1996

	Square Feet					
	Office	Retail	Service	Rest	Other	Total
Madison Avenue - South of Winslow Way	16,423	1,103	3,200	3,874	11,719	36,319
Parfitt Way Avenue - Madison Avenue to Wood Avenue	7,159	1,944	0	1,400	1,120	11,623
Winslow Way - West of Madison	19,943	2,989	0	0	0	22,932
Winslow Way - Madison Avenue to Highway 305 - South Side	21,968	59,677	7,686	2,522	12,827	104,680
Winslow Way - Madison Avenue to Highway 305 - North Side	20,415	59,711	5,400	14,082	0	99,608
Winslow Way - Highway 305 to Ferncliff	30,464	0	2,550	2,058	18,126	53,198
Ericksen Avenue - West Side - Winslow Way to Wallace Way	23,650	2,280	6,786	0	0	32,716
Ericksen Avenue - East Side - Winslow Way to Wallace Way	38,930	1,310	4,340	0	1,313	45,893
Madison Avenue - West Side - Winslow Way to High School Road	20,697	11,728	8,201	7,281	8,438	56,345
Madison Avenue - East Side - Winslow Way to High School Road	11,193	16,422	9,588	2,000	12,984	52,187
Wyatt Way - Madison to Ericksen	3,776	0	0	0	0	3,776
Knechtel - Madison to Ericksen (north side only)	0	0	0	0	4,401	4,401
Wallace Way (Madison to Ericksen)	0	0	0	0	0	0
High School Road - East of Highway 305	8,069	35,000	4,080	3,971	0	51,120
High School Road - Highway 305 to Madison	48,873	89,535	2,012	4,500	29,498	174,418
Total	271,560	281,699	53,843	41,688	100,426	749,216

Source: Property Counselors.

There is one lodging facility in the area, the 46-room Island Country Inn.

The inventory also identified 400 businesses within the commercial area. This figure may understate the total number of businesses as it is difficult in many cases to distinguish individual businesses. The number of businesses by type and average square feet per tenant is as follows:

Office:	253 businesses, 1,070 square feet average per business
Retail:	80 businesses, 3,520 square feet average per business
Service:	27 businesses, 1,990 square feet average per business
Restaurant:	24 businesses, 1,740 square feet average per business
Other:	16 businesses, 6,280 square feet average per business

Over 60% of the businesses in the commercial area are in offices. The businesses are small on average.

The office category includes nine health care-related businesses - medical and dental clinics and opticians. These businesses range in size from the 2,126-square foot Vision Center to the 8,428-square foot Winslow Clinic. The average size of these businesses is 3,455 square feet, considerably larger than the remaining office-using businesses.

Based on these results and a qualitative assessment of the area, the commercial district can be characterized as follows:

- The major business concentration is along Winslow Way between Madison Avenue and Highway 305. A second major concentration is located at High School Road. Additional commercial development stretches along Madison and Erickson Streets.

- With the exception of the Town and Country Thriftway store, the retail stores on Winslow Way are small scale and pedestrian friendly. The High School Road concentration is more auto oriented, with ample parking and good highway access.

- The businesses along Madison and Erickson are relatively small in scale but are spread out and less accessible to pedestrians.

- Office space is spread more uniformly throughout the commercial district. Much of the office space is in stand-alone buildings with its own parking.

Current business conditions are also reflected in sales data available from the Washington State Department of Revenue. Retail sales data provide a measure of the performance of retail business in terms of sales efficiency (dollars per square foot) and their ability to capture market area spending. Table 4 summarizes a comparison of estimated spending by island residents and business receipts by island businesses. Island spending is estimated by applying statewide average spending figures per $1,000 in personal income times the aggregate income on the island. As shown, estimated spending by island residents is $362 million in 1994. Gross retail sales (adjusted from net taxable sales) are estimated to be $179 million. Spending by island residents exceeds local sales by a factor of 2. Essentially, one-half of island spending leaks out of the community.

The extent of leakage is not surprising given the size of the market area. 56% of the leakage is accounted for in three categories—general merchandise, auto dealers, and wholesale trade. The two sectors with net inflows are Building Materials/Hardware and Contracting, reflecting a high level of construction on the island in that year. The only other sectors where the island captures a significant share of total spending are Grocery and Personal Services.

Table 4
1994 Retail Leakage Analysis
City of Bainbridge Island

SIC	Category	Sales/$1,000 Income	Resident Spending	Gross Sales	Retail Leakage
52	Building Materials/Hardware	20.71	10,450,639	13,330,104	(2,879,465)
53	General Merchandise	43.65	22,026,576	0	22,026,576
54	Food	85.44	43,114,562	35,932,348	7,182,214
55	Auto Dealers/Gas Station	85.89	43,341,640	2,703,118	40,638,522
56	Apparel/Accessories	22.07	11,136,919	2,372,957	8,763,962
57	Furniture/Appliances	26.12	13,180,622	5,583,597	7,597,025
58	Eating/Drinking	37.59	18,968,591	9,899,235	9,069,355
59	Misc. Retail	54.14	27,320,019	14,520,173	12,799,846
	Total Retail Trade	375.61	189,539,567	84,341,532	105,198,035
70	Hotel/Motels	8.77	4,425,500	793,898	3,631,602
72	Personal Services	4.42	2,230,412	1,575,952	654,460
73	Business Services	33.41	16,859,287	5,932,662	10,926,626
75	Auto Repair/Services	15.06	7,599,547	4,860,156	2,739,391
76-89	Other Services	21.10	10,647,440	6,314,683	4,332,757
	Total Services	82.76	41,762,186	19,477,351	22,284,835
15-17	Contracting	82.89	41,827,786	46,750,217	(4,922,431)
19-39	Manufacturing	42.60	21,496,727	9,589,688	11,907,039
40-49	TCPU	27.89	14,073,796	7,728,610	6,345,187
50-51	Wholesale Trade	93.89	47,378,584	6,153,889	41,224,695
60-67	FIRE	8.07	4,072,267	901,587	3,170,680
96-99	Other Business	4.19	2,114,349	3,730,370	(1,616,021)
	Total All Industries	717.90	362,265,262	178,673,244	183,592,018

While it is unrealistic to expect island businesses to increase their shares in segments generally served on a regional basis, there is potential to increase shares in the following sectors:

- Eating/Drinking
- Misc. Retail
- Hotels/Motels
- Other Services

Real Estate Market Conditions

Real estate market conditions are often summarized in terms of amount of development, vacancy rate, absorption rate, and prevailing rents or prices. Such data are presented for each of several types of development below.

OFFICE

As presented in the commercial district survey, there are approximately 270,000 square feet of office space in Winslow. There are three typical types of space—converted single-family homes, older commercial buildings, and new office buildings. Based on our inventory, we estimate the overall vacancy rate to be about 2%.

Comparing the current inventory with a city inventory done in December 1993, we identify 10 new commercial buildings built in the past two years, comprising 31,000 square feet. While there is currently vacant space in the market, there was undoubtedly vacant space at the time of the previous inventory. The 31,000 square feet of new development represents a reasonable estimate of new absorption. On average, the commercial district absorbed approximately 15,000 square feet of development per year. Approximately two-thirds of that was office and the balance retail and services.

Office rents in the newer buildings range from $1.25 per square foot per year, fully serviced, to $2.00 per square foot per year for buildings with prime water views. Average rents in these buildings are $1.50 per square foot.

The types of office tenants in these buildings are generally small but include both local serving businesses and regional serving businesses which choose to locate here because they either live on the island or like the character of the area.

RETAIL

As presented in the commercial district survey, there are approximately 280,000 square feet of retail space in Winslow. Major retail businesses include:

Town and Country Thriftway	31,000 SF
Lumberman's	13,000 SF
Ace Hardware	22,000 SF
PayLess	36,000 SF
Safeway	47,000 SF

Winslow Mall and Winslow Green each offer multitenant retail clusters with 10,000 to 15,000 square feet. As noted in the office discussion above, the overall commercial vacancy rate is about 2%.

There are three general types of retail buildings in Winslow: the older retail buildings, the newer specialty malls and the neighborhood shopping center with Safeway and PayLess. Small tenant rents in these three types of space are estimated to be:

Older Retail: $10 to $13 per square foot per year, partially serviced (tenant pays utilities and interior maintenance).

Newer Retail: $14 to $20 per square foot, partially serviced.

APARTMENTS

The City estimates that there are 1,299 multifamily units on Bainbridge Island at the present time. Approximately two-thirds of these units are rental apartments versus condominiums. Many of the apartments are assisted rent projects as opposed to market rate projects. We have identified four market rent projects with 40 or more units:

- Island Homestead, on Wyatt, built in 1988 with 75 units.
- Bainbridge Quay, with 70 units.
- Madison Avenue Retirement Center, on Madison Avenue, with 56 units.
- Eagles Nest, on Madison, built in 1978 with 40 units.

The Madison Avenue Retirement Center is an adult congregate living facility offering meals and other services in addition to shelter.

Island Homestead and Eagles Nest capture the highest rents of the larger apartment buildings. The overall vacancy rate for the two buildings is approximately 5%. Average rents are as follows:

1 BR or 2 BR/1 BA	$510-$575	800-900 SF	$0.65/SF/Mo
2 BR/2 BA	$675-$810	950-1,015 SF	$0.70-$0.80/SF/Mo

In addition to the 56-unit Madison Avenue Retirement Center, there are four additional senior housing projects on Bainbridge Island:

Winslow Manor	39 Units	Market Rate
Virginia Villa	40 Units	Assisted Rent
Winslow Arms	60 Units	Assisted Rent
Finch Place	29 Units	Assisted Rent

In total, these five senior projects represent 224 units or 17% of the multifamily housing units on the island.

CONDOMINIUMS

We have identified 233 condominium units in the Winslow commercial district plus 175 condominium units located outside the commercial district, in many cases closer to the water. The projects are listed in Table 5 and represent an approximate, if not complete, inventory.

Table 5
Selected Winslow Condominium Projects

Within Commercial District Survey Area		
Tillicum Condominiums	465 Winslow Way	28 units
637 Madison	637 Madison	6 units
Madison Park Condominiums	1057 Madison N.	11 units
Madison Avenue Cottages		20 units
The Madison Condominiums	774 Madison N.	14 units
Winslow Cohousing	353 Wallace Way	30 units
Blue Herron	Wallace Way	54 units
Bainbridge Crest Townhouse	339 High School Road	11 units
Winslow Green	Winslow Way & Madison	34 units
Chatham Cove	Weaver & High School Road	25 units
Summer House at Winslow	177 Wallace	5 units
		233 units
Other Condominiums		
Olympian	370 Growe Avenue	33 units
Growe Village	220 Growe Avenue	8 units
The Bainbridge	965 Winslow Way E.	17 units
Harborside	Wood Avenue	10 units
Williamson Landing	Wood Avenue	6 units
Sun Day Cove	Winslow Way & Lovell	25 units
Eagle Harbor	Harborview Drive	64 units
Shannon Landing	Shannon Drive	4 units
Place 18	Eagle Harbor Lane	18 units
		175 units

Source: Property Counselors.

Winslow condominiums fall into one of two general categories:

- Waterfront or view condominiums such as the last six projects listed in Table 5. Units are typically large—two- and three-bedroom units with 1,500 to 2,000 square feet or more. Sale prices generally exceed $200,000 and reach as high as $600,000.

- More affordable units such as those in the upper portion of the table featuring smaller units at 1,000 to 1,500 square feet, and alternative forms such as the Madison Avenue Cottages and Winslow Cohousing. Unit prices are $120,000 to $170,000.

III. Regional Experience

The economy and population growth of the Central Puget Sound region will have a significant influence on the demand for development in Winslow. Winslow's characteristics relative to other communities in the region will determine the share of regional activity which Winslow can capture. This section addresses the overall growth in the region, the role of downtown Seattle as an employment center, and the experience of other communities in the region.

Regional Growth

The Central Puget Sound region is defined generally as the four-county area including King, Kitsap, Pierce, and Snohomish Counties. While the Seattle Consolidated Metropolitan Statistical Area (CMSA) includes Thurston County and Island County, the four larger counties form the Puget Sound Regional Council and are the subject of extensive economic modeling and forecasting.

The historical and projected levels of population, households, and employment are summarized in Table 6.

Table 6
Central Puget Sound Region
County Population, Households and Employment

County	1980	1990	2000	2010	2020	Average Annual Increase 1980-1990	1990-2000	2000-2010
POPULATION								
King	1,269,749	1,507,319	1,686,234	1,856,240	2,069,450	23,757	17,892	17,001
Kitsap	147,152	189,731	228,795	276,852	329,198	4,258	3,906	4,806
Pierce	485,643	586,203	693,473	810,777	900,636	10,056	10,727	11,730
Snohomish	337,720	465,642	587,065	706,959	833,661	12,792	12,142	11,989
Region	2,240,264	2,748,895	3,195,567	3,650,828	4,132,945	50,863	44,667	45,526
HOUSEHOLDS								
King	497,263	615,792	706,254	826,086	937,954	11,852	9,046	11,983
Kitsap	52,809	69,267	84,695	107,877	128,690	1,646	1,543	2,318
Pierce	174,232	214,652	256,215	314,835	349,365	4,042	4,156	5,862
Snohomish	120,699	171,713	218,442	276,549	326,014	5,101	4,673	5,811
Region	845,003	1,071,424	1,265,606	1,525,347	1,742,023	22,642	19,418	25,974
TOTAL JOBS								
King	697,401	972,567	1,123,512	1,301,870	1,420,533	27,517	15,095	17,836
Kitsap	56,701	79,267	89,621	110,085	128,415	2,257	1,035	2,048
Pierce	175,904	224,059	267,323	313,275	353,457	4,816	4,326	4,595
Snohomish	103,401	169,350	221,841	265,061	303,405	6,595	5,249	4,322
Region	1,033,407	1,445,243	1,702,297	1,990,291	2,205,810	41,184	25,705	28,799

Source: Puget Sound Regional Council.

As shown, the population of the four-county region was 2.7 million in 1990 and is projected to exceed 3 million by the year 2000. The population of King County represented approximately 55% of the regional population in 1990, but that share is projected to drop below 50% by 2020.

King County's share of jobs exceeds its share of population, with 67% of regional jobs located in King County in 1990, with the share expected to decline to 64% by 2020.

As shown, the region grew by 51,000 residents per year between 1990 and 2000, and is projected to continue to grow at rates of approximately 45,000 per year between 2000 and 2020. The number of households is projected to grow by 23,000 per year through the year 2000, by 19,000 per year between 2000 and 2010, and by 26,000 per year between 2010 and 2020.

Kitsap County's share of population is projected to grow from 7% of the four-county total to 8% by 2020. The County's share of jobs is projected to increase as well, from 5.5% in 1990 to 5.8% in 2020. The County will continue to be a net exporter of residents to jobs.

The average household income varies among counties in the region as follows.

Table 7
Central Puget Sound Region
Average Household Income - 1993

King	$55,019
Kitsap	$46,995
Pierce	$44,236
Snohomish	$51,320
Total	$51,675

Source: Puget Sound Regional Council.

King County had the highest average household income in 1993.

DOWNTOWN SEATTLE EMPLOYMENT

Winslow is a 35-minute ferry ride from downtown Seattle. As the major employment center in the Puget Sound region, downtown represents a daily destination for residents of surrounding communities. The characteristics of the downtown Seattle workforce greatly affect their housing needs.

The Puget Sound Regional Council conducted an extensive survey of downtown Seattle employees in 1987 and 1992. The results of the latter survey were published in June 1993. The occupations of downtown workers in 1992 were as shown in the following table.

Table 8
Downtown Seattle Employees - 1992
Occupation

Retail Sales	5.6%
Other	6.1%
Secretarial/Clerical	23.8%
Personal Services	3.2%
Professional/Technical	33.5%
Management/Admin	15.6%
Other Services	7.1%
Other	5.2%
	100.0%

Source: Puget Sound Regional Council.

The largest occupation, professional/technical, represented a lower percentage of the total workforce than did secretarial/clerical in 1987, but the former grew significantly while the latter declined.

The distribution of employees by household income is summarized in the following table.

Table 9
Downtown Seattle Employees - 1992
Household Income

< $15,000	9.1%
$15,000-$24,999	14.6%
$25,000-$34,999	15.8%
$35,000-$54,999	24.2%
$55,000-$74,999	16.8%
$75,000 +	19.6%
	100.0%

Source: Puget Sound Regional Council.

As shown, there is a wide range of income levels, with almost one quarter falling in the $35,000 to $54,999 interval, but almost 20% exceeding $75,000.

The distribution of employees by age is shown in the following table.

Table 10
Downtown Seattle Employees - 1992
Age

Under 18	0.1%
19-30	30.3%
31-40	33.4%
41-50	23.1%
51-64	11.1%
65 and over	2.1%
	100.0%

Source: Puget Sound Regional Council,
Downtown Seattle Employee Survey 1992.

The average age of employees is 37.7, up from 35.0 in 1987.

Employment levels in downtown Seattle are projected to grow from 117,000 in 1990 to 128,000 in the year 2000 and 147,000 in the year 2010, a total increase of 30,000 jobs over 20 years. The service sector provides virtually all of that growth.

In summary, the growth in downtown employment will provide significant demand for new housing to accommodate additional employees. While the new jobs will be primarily in the service sector, they will represent a range of occupations from personal services to professional/technical and will span a wide income range.

COMPARISON TO OTHER COMMUNITIES

Future growth and development in Winslow will depend at least partly on its desirability in comparison with other communities in the region. Because of its easy access by ferry from downtown Seattle, it will compete with close-in neighborhoods within the city of Seattle. Because of its waterfront setting, it will compete with other high amenity settings. Even if Winslow does not compete directly with such communities, their experience provides some insights into how communities develop in response to economic and demographic trends.

Table 11 compares several characteristics of 15 communities in the Central Puget Sound region. The communities are grouped into tiers based upon their accessibility to the employment center of downtown Seattle. The first tier includes such close-in neighborhoods as Denny Regrade, Seattle Center/Lake Union, Queen Anne, and Capitol Hill. The second tier includes communities within 15 to 20 minutes commuting distance: several in-city neighborhoods and Mercer Island (with its exceptional freeway access). The third and fourth tiers include high amenity suburban communities. A more complete comparison is provided in Appendix B.

The first two columns compare the past and projected future levels of growth. The communities are designated by Forecast Analysis Zone (FAZ) as defined by the Puget Sound Regional Council. The selected zones are those which include the traditional community center. With some exceptions, the close-in neighborhoods experienced greater population growth from 1990 to 1994 than did the communities in the second and third tiers. This result is even more pronounced for projected growth in 1994 through 2000. Except for the Seattle CBD, Bellevue CBD, Fremont/Wallingford, and Mercer Island, none of the communities are projected to grow by more than 500 residents. Many of the close-in neighborhoods are mature and have a limited capacity for (or interest in) significant growth.

The table also compares levels of employment (in 1990) and the scope of commercial development. The communities with the largest employment bases are the Seattle CBD, Denny Regrade, Seattle Center/Lake Union, and Bellevue CBD. The retail and commercial development in these areas serve largely a regional market area. Queen Anne, Fremont/Wallingford, Ravenna/University, and Ballard all have significant employment centers. Each of these serve as community scale retail centers with some specialty stores serving a wider area. The waterfront communities generally are smaller employment centers, and serve as neighborhood scale retail centers or specialty destinations.

The final column addresses the mix of income levels. The disparity between the number of upper income and lower income households is expressed in relative terms according to whether the number of upper income households exceeds the number of lower income households and by how much. As shown, the waterfront communities show a balanced or positive income distribution. The central business districts and close-in Seattle neighborhoods show significant negative distributions.

Winslow's comparative position in the region can be summarized as follows:

- Beyond the first tier of areas around the Seattle CBD, existing communities are mature and somewhat built-out and are not projected to experience higher rates of growth. Winslow can compete effectively in terms of commute time and convenience with these communities.

- Winslow has a small and specialized downtown by regional standards. However, it is comparable to the other waterfront communities in terms of its amount of employment and scope of its commercial businesses. Availability of retail and service support should not be an obstacle to attracting residents and additional business.

- Winslow offers an opportunity to provide a more balanced distribution of incomes than either the close-in Seattle community or the other waterfront communities in the region. The other communities have either more upper or lower income households, and do not have the growth capacity to regain a balance. Winslow already offers a balanced distribution, and it could be reinforced with growth.

Table 11
Summary of Regional Comparison

	Population Growth 1990-1994	Projected Growth 1994-2000	Employment	Commercial Character	Mix of Income
Seattle CBD	⬤	⬤	⯁	Regional	- - -
1st Tier					
Denny Regrade	⬤	•	⯁	Regional/Nbd.	- - -
Seattle Center/Lake Union	⚫	⚫	⯁	Regional/Specialty	- - -
Queen Anne	●	•	◆	Nbd./Specialty	-
North Capitol Hill	•	•	⬩	Nbd./Specialty	+ +
2nd Tier					
Alki Admiral	●	•	⬩	Nbd./Specialty	0
Fremont/Wallingford	•	●	◆	Nbd./Specialty	- - -
Ravenna University	⚫	•	◆	Comm./Specialty	- -
Green Lake	•	•	⬩	Nbd./Specialty	- - -
Ballard	●	•	◆	Comm./Specialty	- -
Mercer Island	•	●	⬩	Comm./Specialty	+ + +
3rd Tier					
Bellevue CBD	•	⬤	⯁	Regional	- - -
Kirkland/Houghton	⚫	•	◆	Specialty	+ +
Edmonds	●	•	⬩	Specialty	+
4th Tier					
Gig Harbor	⬤	•	⬩	Specialty	0

Key

Population		Employment		Income	
•	< 500	⬩	< 7,5000	Extent to which number of upper income households exceeds number of lower income households:	
●	500-999	◆	7,500-14,999	+ + +	Greatly exceeds
⚫	1,000-1,499	⯁	15,000 and up	0	Approximately equal
⬤	1,500 and up			- - -	Significantly less

IV. PROJECTIONS OF FUTURE DEVELOPMENT

Future development within Winslow is expected and inevitable. The City is preparing a plan to shape and guide that development to meet the Comprehensive Plan goals and the Master Plan Steering Committee visions for the future. It is important to project future levels of development as a means of testing alternative actions today against their possible outcomes and relationships to goals. Most important, projection of future conditions helps to identify the relationship between development regulations and potential levels of growth. The projections presented in this section were prepared with that intent. They are organized in terms of baseline projections, estimated development capacity, and projections by use.

BASELINE PROJECTIONS

Baseline projections for population and households have been prepared by both the Puget Sound Regional Council and the City of Bainbridge Island. The PSRC projections reflect a regional view and a step-down to local analysis zones. The City projections reflect an analysis of local trends and City expectations. Together they describe some important determinants of future levels of development.

Table 12 presents the PSRC projections for population and household growth. As shown, the current population of approximately 18,000 for the city as a whole is projected to grow by 10,000 people by the year 2020. The average growth would be approximately 400 per year. The number of households is projected to grow by approximately 4,500 by 2020, a growth rate of approximately 175 per year. Table 13 presents the PSRC projections on income distribution for Winslow and the City as a whole. The figures reflect an increasing share of households above the median for the region, in both Winslow and the city as a whole. In the case of Winslow, the balanced distribution in 1990 changes significantly.

Table 12
City of Bainbridge Island
Projected Future Population and Housing
Puget Sound Regional Council

	1990	2000	2010	2020	Average Annual Increase 1990-2000	2000-2010	2010-2020
POPULATION							
City of Bainbridge Island	15,846	19,827	23,727	27,579	400	390	385
HOUSING							
City of Bainbridge Island							
Single-Family	5,322	6,495	7,953	18,737	120	145	80
Multifamily	812	1,354	1,816	2,560	50	45	75
Total	6,134	7,849	9,769	11,297	170	190	155
MULTIFAMILY AS % OF TOTAL							
Winslow	38.5%	46.3%	47.9%	51.2%			
City of Bainbridge Island	13.2%	17.3%	18.6%	22.7%			

Source: Puget Sound Regional Council, August 1995; Property Counselors.

Table 13
Winslow and City of Bainbridge Island
Projected Income Levels

Distribution of Household Income	1990	2000	2010	2020
Winslow				
Low	26.9%	22.2%	20.4%	19.3%
Low Middle	24.9%	25.2%	22.9%	21.0%
Upper Middle	22.7%	24.5%	24.7%	24.8%
Upper	25.5%	28.2%	32.1%	34.9%
	100.0%	100.0%	100.0%	100.0%
City of Bainbridge Island				
Low	18.7%	16.5%	15.2%	14.8%
Low Middle	19.6%	20.0%	18.4%	17.2%
Upper Middle	24.7%	26.0%	25.1%	24.4%
Upper	37.0%	37.6%	41.3%	43.7%
	100.0%	100.0%	100.0%	100.0%

Source: Puget Sound Regional Council, August 1995.

The City of Bainbridge Island has prepared its own projections as part of its master plan and overall planning under the State's Growth Management Act. That planning focuses on the 20-year period 1992-2012. The key numbers in those projections are summarized in Table 14.

Table 14
City Projections of Population and Housing

	1992	2012	Growth 1992-2012	Avg. Annual Growth
Population				
City	16,850	24,280	7,430	370
Historic Winslow	3,397	7,112	3,715	190
Winslow as % of City	20.2%	29.3%	50%	
Housing				
Historic Winslow				
Single-Family	701	1,144	443	22
Multifamily	982	1,965	983	49
Manufactured	72	102	30	2
Total	1,755	3,211	1,456	73
Average HH Size	1.9	2.2	2.6	

Source: City of Bainbridge Island.

City projections for total population in 2012 are consistent with the PSRC projections for the year 2010. The projected growth represents 7,430 residents over the 20-year period. The City's goal is to accommodate 50% of that growth within historic Winslow (the area which formerly constituted the City of Winslow). Housing units are projected to increase by 1,456, with approximately two-thirds of that growth in multifamily units. The average household size is projected to increase over the period.

Development Capacity

The City conducted a survey of the Winslow Downtown area in 1993. Using those results, the City estimated the additional development which could be provided under existing zoning and under a proposal by a citizens' committee for a Mixed-Use Town Center area in Winslow. The results are as follows.

	Commercial SF	Dwelling Units
Mixed-Use Town Center		
Existing	583,517	280
Additional Under Existing Zoning	636,741	348
Additional Under Proposal	153,971	67
With Density Bonus	—	220
Total	1,374,229	915
Additional Development Capacity		
Mixed-Use Town Center	790,712	635
Outside Town Center	—	1,192
Total	790,712	1,827

As shown, the additional capacity in the Mixed-Use Town Center is 790,000 square feet of commercial space and 635 housing units. In addition, the City has estimated development potential in the R2.9, R3.5, R4.3, R8, and R14 residential zones outside the Mixed-Use Town Center area to be 1,192 housing units. The overall development capacity of 1,827 units exceeds the projected growth of 1,456 over the period 1992 through 2012. This capacity can be further compared with market opportunities for residential and commercial development as presented in the remainder of this section.

PROJECTIONS BY USE

The City's Comprehensive Plan identifies Winslow as "the heart of the island, with a vibrant pedestrian-oriented core which should be enhanced as a center for the island's commercial activity, a common area or center where the local community can meet." The analysis of existing conditions confirms that Winslow is the heart of the island with a mix of uses. There is certainly potential for enhancement. The projections presented below suggest the likely segments of growth, the factors which affect demand in those segments, and the potential levels of demand.

RESIDENTIAL

There are two obvious segments of potential demand for residential growth in Winslow: households with one or more members working in downtown Seattle, and current island residents looking for smaller, lower maintenance dwelling units (often empty nesters).

COMMUTER SEGMENT

As presented earlier, the downtown employment base is projected to grow by 30,000 workers over the next 20 years. Those workers will require housing somewhere in the metropolitan area. The higher income professional/technical employment categories are already well represented among Bainbridge commuters as evidenced by the income levels on the island and the passenger activity on the ferry at peak commuting times. The lower income entry level or retail service employees represent a segment which might be attracted to higher density, lower priced housing on the island, in the future.

Winslow would be competing for these residents with other close-in neighborhoods in Seattle. As presented earlier, other than the Seattle CBD, Denny Regrade and Seattle Center/Lake Union, other neighborhoods are mature and relatively built-out. These areas are projected to grow by an average of approximately 300 households, or only 50 households per year, between 1994 and 2000. Winslow could capture a larger share of this demand if it can provide an attractive setting and affordable housing.

The rate of 50 households per year is probably a conservative estimate for this segment of demand, representing only 3% of projected employment growth. This segment would represent the lower portion of the income range for downtown workers, approximately $45,000 or less. Affordable housing prices could be up to $115,000 for this segment and rents as high as $800 per month. Average rents and prices would be lower, however. Housing is currently available at these prices in existing apartments or condominiums. However, new construction will be required to accommodate growth, and new development must be targeted to these segments if housing is to be affordable.

Empty Nesters

Empty nesters would likely be attracted to new housing opportunities in Winslow as they find that they no longer need a large single-family home elsewhere on the island. A typical owner of a single-family home may live in such a setting for 30 years, approximately 1-1/2 generations. On average, one 1/30th of the households on the island would be reaching the end of that tenure each year. They would be potential residents of smaller multifamily housing units in Winslow. Based on a current single-family inventory of 5,300, there would potentially be 175 households looking to move to smaller units on the island each year. Winslow would compete for such residents with other communities such as downtown Seattle, downtown Bellevue, Kirkland or Edmonds. A capture rate of 50 per year would represent only 29% of the potential.

Such residents would likely be interested in the larger, more expensive condominium units like the several existing water view condominiums in the area already.

Summary of Demand

The segments described above are the two most obvious ones. In addition, there will be interest by young families attracted to the local schools and island lifestyle. While many of them will be attracted to single-family units, there will certainly be some interest in higher density alternatives in Winslow.

In all cases, the demand for housing in Winslow will be related to the area's ability to maintain and enhance an active and attractive physical setting. In addition, the demand will depend as well on housing opportunities in the Seattle CBD, Denny Regrade and

South Lake Union. If Seattle's proposed urban villages such as the Seattle Commons are slow to realize their visions, Winslow will offer a particularly strong alternative.

The City's projections of an additional 1,4560 housing units in Winslow over the next 20 years is not unrealistic given the potential of 100 units per year in the two major market segments only.

Office

The primary segments of office-using employment are the service sector and government. Puget Sound Regional Council projects a slowdown in the rate of future growth in these categories in Winslow compared to the last decade. Based on these projections, the demand for office space would probably not increase beyond its current levels.

Office-using businesses on the island fall into one of two categories: businesses serving island residents and businesses serving a larger market area but choosing to locate here perhaps because the owner lives here. The demand for office space for the former businesses will grow as the island population grows. The demand for the latter will depend on whether businesses continue to choose Winslow over alternative locations. Enhancement of Winslow as an active, pedestrian-oriented district would increase its attractiveness for such businesses somewhat.

Overall, it is not likely that office demand would greatly exceed its recent average absorption rate of 10,000 square feet per year. At that rate, the total increase in occupied office space would be 160,000 square feet by the year 2012.

Retail

Winslow has the potential to serve in three roles as a retail center:

- retail center for residents in immediate area
- retail center for residents of island-wide market area
- specialty destination for visitors from elsewhere in the region.

Local Demand

New residents in Winslow will spend relatively more of their income in Winslow than residents elsewhere. Additional spending by such residents can be estimated at $2,500 per household, assuming spending factors of $20 per $1,000 income for eating/drinking, $20 for miscellaneous retail, and $10 for other purchases, and an average $50,000 annual household income. The additional 1,500 households in Winslow over the next 20 years would support 18,750 square feet of retail development.

ISLAND-WIDE DEMAND

As presented in Table 4, Bainbridge Island businesses capture approximately 45% of island spending on a net basis. With no additional increase in the rate of capture, population growth over the next 20 years will increase retail trade and service receipts by 44%, or $46 million, equivalent to 184,000 square feet of retail development. With an increase in the net capture rate to 50%, the potential additional space would increase to 250,000 square feet.

DESTINATION RETAIL

The potential demand for new retail space to service visitors is quite speculative. Small communities like La Conner in Skagit County and Langley on Whidbey Island have commercial districts which cater almost entirely to visitors on weekends and during the summer. These seasonal patterns can create conflicts with a resident population. Commercial buildings with 20,000 to 40,000 square feet can accommodate one or more restaurants and small shops, and are a typical size in some of these other communities. New development in this size range could flourish during the peak days and seasons, but would have to rely on local patronage during the balance of the year. Such increments of development become feasible when the local population can support new development.

SUMMARY

The potential new retail development over the next 20 years can be estimated as:

Local Demand	20,000 square feet
Island-Wide	250,000 square feet
Destination	60,000 square feet
	330,000 square feet

Much of the island-serving retail development would be located in both the High School Road area and in the center of Winslow. The local support and destination retail would be located near the center of Winslow.

The ability of Winslow to attract the level of development identified will be dependent largely on the City's achieving the population growth identified for the island as a whole and to a lesser extent creating an environment in the downtown area which attracts residents and visitors.

COMPARISON TO DEVELOPMENT CAPACITY

The projections can be compared to the development capacities presented earlier in this section.

	Potential Demand-2012	Additional Capacity
Housing	1,500 units	1,827 units
Commercial		
Office	200,000 SF	
Retail	330,000 SF	
Total	530,000 SF	790,712 SF

APPENDICES

A. WINSLOW COMMERCIAL DISTRICT INVENTORY

B. REGIONAL COMMUNITY COMPARISON

APPENDICES

A. WINSLOW COMMERCIAL DISTRICT INVENTORY

B. REGIONAL COMMUNITY COMPARISON

Commercial Inventory
Winslow Town Center
City of Bainbridge Island

Parcel Number	Name	Address No.	Address Street	Use	Square Feet Office	Square Feet Retail	Square Feet Service	Square Feet Rest	Square Feet Other	Square Feet Total	Housing Units	Number of Tenants Office	Number of Tenants Retail	Number of Tenants Service	Number of Tenants Rest	Number of Tenants Other	Number of Tenants Total
Madison Avenue - South of Winslow Way																	
262502-3-090	Seabreeze Apartments	198	Madison South	Apartment						0	6						0
262502-3-091	Windemere Real Estate	220	Madison South	Office	3,200					3,200		1					1
262502-3-078	Vacant Lot		Madison South	Vacant						0							0
262502-3-093	Edwin Monk & Sons	270	Madison South	Office	2,060					2,060		3					3
262502-3-094	Bainbridge Cleaners	310	Madison South	Service			3,200			3,200				1			1
262502-3-095	City Utility		Madison South	Utility						0							0
262502-3-096	Waterfront Bldg.	330	Madison South	Mixed Use	7,500			1,500		9,000		3			1		4
272502-4-115	Congregational Church	105	Winslow Way W	Other					11,719	11,719						1	1
272502-4-112	Travel Store	219	Madison South	Office	991	1,103				2,094		4	1				5
272502-4-111	SFR	231	Madison South	SFR						0	1						0
272502-4-109	Norman Down	261	Madison South	Office	2,272					2,272		15					15
272502-4-108	SFR	271	Madison South	SFR						0	1						0
272502-4-107	Madison Avenue Retirement	285	Madison South	Apartment						0							0
272502-4-106	Contractor		Madison South	Office	400					400		1					1
(000000-0-000)	Marina Parking		Madison South	Parking						0							0
272502-4-089	Madrona Waterfront Cafe	403	Madison South	Restaurant				2,374		2,374					1		1
										0							0
Parfitt Way Avenue - Madison Avenue to Wood Avenue																	0
272502-4-088	Pegasus	131	Parfitt Way	Mixed Use	2,250			1,000		3,250							0
(000000-0-000)	Chandlery, Cutler Architects	133	Parfitt Way	Mixed Use	1,728	1,944		400	1,120	5,192							0
272502-4-086	SFR - brown house	175	Parfitt Way	SFR						0	1						0
272502-4-084	Cutler Architects		Parfitt Way	Office	1,205					1,205		1					1
272502-4-085	SFR - Norman Down		Parfitt Way	SFR						0	1						0
272502-4-136	The Pub	231	Parfitt Way	Restaurant	1,312					1,312							0
272502-4-082	SFR		Parfitt Way	SFR						0	1						0
272502-4-103	Winslow Arms	220	Parfitt Way							0							0
272502-4-104	Captain's House B&B	234	Parfitt Way							0	1						0
272502-4-091	Balas/Katz Architects	274	Parfitt Way		664					664		1					1
272502-4-090	SFR		Parfitt Way							0	1						0
										0							0
										0							0
Winslow Way - West of Madison										0							0
272502-4-019	Vacant		Winslow W	Vacant						0							0
4107-004-011	Alliance Building	298	Winslow W	Office	4,478					4,478		7					7
4107-004-006	SFR		Winslow W	SFR						0	1						0
272502-4-096	Vacant		Winslow W	Vacant						0							0
272502-4-097	DLI Engineering	253	Winslow W	Office	7,332					7,332		1					1
272502-4-098	Winslow Auto Parts	241	Winslow W	Mixed Use		2,989				2,989			1				1
272502-4-099	Bainbridge Review	221	Winslow W	Mixed Use	1,100					1,100	1						0
272502-4-100	Finch Place Building	147	Finch Place	Office	3,789					3,789		3					3
272502-4-101	Bainbridge Babies	151	Finch Place	Office	2,215					2,215		1					1
272502-4-102	SFR	155	Finch Place	SFR						0	1						0

Commercial Inventory
Winslow Town Center
City of Bainbridge Island

Parcel Number	Name	Address No.	Address Street	Use	Square Feet Office	Square Feet Retail	Square Feet Service	Square Feet Rest	Square Feet Other	Square Feet Total	Housing Units	Number of Tenants Office	Number of Tenants Retail	Number of Tenants Service	Number of Tenants Rest	Number of Tenants Other	Number of Tenants Total
272502-4-114	Stockers Chiropractic	191	Winslow W	Office	1,029					1,029							0
272502-4-113	Finch Place Senior Residences	215	Finch Place	Apartment						0							0
272502-4-095	SFR	218	Wood	SFR						0	1						0
272502-4-094	Winslow Manor	234	Wood	Apartment						0							0
272502-4-093	SFR	278	Wood	SFR						0	1						0
272502-4-092	Vacant		Wood	Vacant						0							0
										0							0
										0							0
Winslow Way - Madison Avenue to Highway 305 - South Side										0							0
262502-3-073	Cafe Nola, Bain. Electric	101	Winslow Way	Mixed Use			2,016	1,272		3,288				1	1		2
262502-3-024	Bad Blanche, Loomis Travel	133	Winslow Way	Mixed Use	1,000	5,496				6,496	4	1	2				3
262502-3-025	Bainbridge Auto Parts	124	Bjune Drive	Retail		3,525				3,525			1				1
262502-3-074	Eagle Harbor Bookstore	157	Winslow Way	Mixed Use	650	12,918	4,500			18,068		1	4	1			6
262502-3-077	New Washington Mutual	181	Winslow Way	Mixed Use	3,450	3,116	420			6,986		2	3	1			6
262502-3-116	Old Wash. Mutual - Vacant	231	Winslow Way	Retail		1,602				1,602			0				0
262502-3-081	American Marine Bank	255	Winslow Way	Office	12,355					12,355		6					6
4114-001-007	U.S. Post Office		Winslow Way	Public					6,330	6,330		6				1	7
262502-3-082	Ester's Fabrics	287	Winslow Way	Mixed Use	3,375	1,000				4,375		2	1				3
262502-3-083	Christian Science Room	295	Winslow Way	Retail		450				450			1				1
262502-3-084	Town & Country Thriftway	343	Winslow Way	Retail		30,820				30,820			1				1
262502-3-085	Streamliner Diner	397	Winslow Way	Mixed use	1,138	750	750	1,250		3,888		2	1	1	1		5
8008-000-	Tillicum Condominium	465	Winslow Way	Condo						0	28						0
262502-3-089	Ravine		Winslow Way	Vacant						0							0
262502-3-099	Vacant - former gas station		Winslow Way	Vacant						0							0
4114-002-007	City of Winslow	370	Bjune	Public					2,716	2,716						1	1
4114-002-008	City of Winslow	402	Bjune	Public					1,281	1,281						1	1
4114-006-002	City of Winslow	289	Shannon	Club					2,500	2,500						1	1
										0							0
Winslow Way - Madison Avenue to Highway 305 - North Side										0							0
262502-3-072	Lungren Station	106	Madison N	Mixed Use	1,500	4,632	500	2,000		8,632		1	6	1	1		9
262502-3-069	Bainbridge Floor Covering	156	Winslow Way	Retail		6,480				6,480			3				3
262502-3-063	Country Mouse	176	Winslow Way	Retail		3,960				3,960			3				3
262502-3-062	Robert's Jeweler	194	Winslow Way	Retail		2,639				2,639			1				1
262502-3-127	Harold Square - Go Travel	155	Madrone Lane	Office	5,072					5,072		5					5
262502-3-058	Harold Square - Autopilot		Madrone Lane	Office	1,774					1,774		1					1
262502-3-060	Harold Square - Fornters	210	Winslow Way	Mixed Use		3,469		1,500		4,969			2		1		3
262502-3-059	Harold Square - Smith Barney	120	Madrone Lane	Mixed Use	2,039	550				2,589		8	1				9
262502-3-057	Vacant		Winslow Way	Vacant						0							0
262502-3-056	Winslow Hardware	240	Winslow Way	Retail		6,350				6,350			1				1
262502-3-132	Paper Products	256	Winslow Way	Retail	500	3,500				4,000		2	1				3
262502-3-055	Winslow Mall		Winslow Way	Mixed Use		14,457	1,500	1,300		17,257			6	1	2		9
262502-3-133	Vacant		Winslow Way							0							0
262502-3-131	Winslow Drug	290	Winslow Way	Retail		3,800				3,800	1		1				1
262502-3-054	Isla Bonita, Custom Printing	316	Winslow Way	Mixed Use		2,400		3,602		6,002			1		1		2

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262502-3-053	Parking Lot		Winslow Way	Parking						0							0
262502-3-050	Winslow Clinic	380	Winslow Way	Office	8,428					8,428		1					1
262502-3-049	Winslow Clinic annex	390	Winslow Way	Office	1,102					1,102		1					1
262502-3-038	Doogals, Cuts Above		Winslow Way	Mixed Use		1,000	1,000	3,630		5,630			1	1	1		3
262502-3-037	That's a Some Pizza	488	Winslow Way	Restaurant				1,500		1,500					2		2
262502-3-021	Ravine		Winslow Way	Vacant						0							0
262502-3-020	Ravine		Winslow Way	Vacant						0							0
262502-3-136	Vacant		Winslow Way	Vacant						0							0
4118-001-004	Gateway Towing	149	Norman Place	Service			2,400			2,400				1			1
4118-001-002	Sow's Ear, Shoe Repair	554	Winslow Way	Retail		1,705				1,705			2				2
4118-001-001	Chamber of Commerce	590	Winslow Way	Mixed Use		4,769		550		5,319			4		1		5
										0							0
										0							0
Winslow Way - Highway 305 to Ferncliff										0							0
262502-3-100	City Hall	625	Winslow Way	Public					7,546	7,546						1	1
262502-3-103	Edward Ulloa, CPA	701	Winslow Way	Office	1,825					1,825		1					1
262502-3-104	Solarmarine Building	755	Winslow Way	Office	7,973					7,973		17					17
262502-3-105	Flying Penguin Design	761	Winslow Way	Office	1,258					1,258		2					2
	Ferry Parking Lot - Diamond		Winslow Way	Parking						0							0
262502-3-108	Ferry Building & Parking		Winslow Way	Public					8,080	8,080						1	1
262502-3-074	Ferry Parking Lot		Winslow Way	Parking						0							0
262502-3-075	Ferry Parking Lot		Winslow Way	Parking						0							0
262502-3-076	Ferry Parking Lot		Winslow Way	Parking						0							0
										0							0
4109-000-001	Sterling Place	600	Winslow Way	Mixed Use	17,000				2,500	19,500		24				1	25
262502-3-010	Pine Building	682	Winslow Way	Office	1,204					1,204		1					1
262502-3-009	Nystrom Property		Winslow Way	Parking						0							0
262502-3-008	SFR		Ferncliff	SFR						0	1						0
262502-4-006	Cleaners		Winslow Way	Service			1,206			1,206				1			1
										0							0
262502-3-010	Vacant Office Building	180	Olympic Drive		1,204					1,204		0					0
262502-3-106	Import Auto	220	Olympic Drive				1,344			1,344				1			1
262502-3-110	Hall Brothers	260	Olympic Drive	Restaurant				2,058		2,058					1		1
262502-3-109	Kitsap Transit Bus Parking		Olympic Drive	Parking						0							0
262502-3-107										0							0
										0							0
Ericksen Avenue - West Side - Winslow Way to Wallace Way										0							0
262502-3-048	Old frieght building	143	Ericksen Ave	Service			1,360			1,360				1			1
262502-3-047	Bainbridge Island Funeral Home	187	Ericksen Ave	Service			5,426			5,426				1			1
262502-3-046	Winslow Pets	215	Ericksen Ave	Retail		2,280				2,280			1				1
262502-3-045	SFR	241	Ericksen Ave	SFR						0	1						0
262502-3-044	SFR	255	Ericksen Ave	SFR						0	1						0
262502-3-043	SFR	261	Ericksen Ave	SFR						0	1						0
262502-3-042	SFR	299	Ericksen Ave	SFR						0	1						0
262502-3-041	Ericksen Avenue Office Bldg	375	Ericksen Ave	Office	11,519					11,519		25					25

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262502-3-035	Vacant - for sale		Ericksen Ave	Vacant						0							0
262502-3-030	Vacant - for sale		Ericksen Ave	Vacant						0							0
262502-3-040	SFR	353	Ericksen Ave	SFR						0	1						0
262502-3-026	SFR	321	Wyatt	SFR						0	1						0
262502-2-045	Jack Sarin, Naval Architect	382	Wyatt	Office	2,131					2,131		1					1
262502-2-044	SFR	571	Ericksen Ave	SFR						0	1						0
262502-2-060	Vacant		Ericksen Ave	Vacant						0							0
262502-2-043	Garden Plaza Office Building	345	Knechtel	Office	10,000					10,000		10					10
5091-000-004	Vacant		Ericksen Ave	Vacant						0							0
5091-000-003	Vacant		Ericksen Ave	Vacant						0							0
5091-000-002	Vacant		Ericksen Ave	Vacant						0							0
										0							0
										0							0
Ericksen Avenue - East Side - Winslow Way to Wallace Way																	
262502-3-034	Showhouse Square	176	Ericksen Ave	Mixed Use	240	1,310	1,040			2,590	-	1	1	1			3
262502-3-033	Thornbugh Insurance	188	Ericksen Ave	Office	1,456					1,456		1					1
262502-3-032	216 Erickson Avenue Building	216	Ericksen Ave	Office	2,239					2,239		6					6
262502-3-031	SFR		Ericksen Ave	SFR						0	1						0
262502-3-029	SFR	260	Ericksen Ave	SFR						0	1						0
262502-3-028	SFR	266	Ericksen Ave	SFR						0	1						0
262502-3-027	SFR	292	Ericksen Ave	SFR						0	1						0
262502-3-023	SFR	310	Ericksen Ave	SFR						0	1						0
262502-3-022	SFR	348	Ericksen Ave	SFR						0	1						0
262502-3-018	SFR	370	Ericksen Ave	SFR						0	1						0
262502-3-017	Five Seasons Healing	380	Ericksen Ave	Service			300			300	1			1			1
262502-3-016	SFR	430	Ericksen Ave	SFR						0	1						0
262502-3-015	SFR	440	Ericksen Ave	SFR						0	1						0
262502-3-014	SFR	460	Ericksen Ave	SFR						0	1						0
262502-3-013	SFR	470	Ericksen Ave	SFR						0	1						0
262502-2-050	Voyager Montesorri School	520	Ericksen Ave	School					1,313	1,313						1	1
262502-2-051	Office	568	Ericksen Ave	Office	480					480		1					1
262502-2-048	600 Bainbridge Building	600	Ericksen Ave	Office	14,000					14,000		17					17
262502-2-047	600 Bainbridge Building		Ericksen Ave	Office						0							0
262502-2-046	Apartment	650	Ericksen Ave	Apartment						0	7						0
262502-2-066	Vacant		Ericksen Ave	Vacant						0							0
262502-2-049	Office Building	710	Ericksen Ave	Office	5,483					5,483		4					4
262502-2-063	Office Building	724	Ericksen Ave	Office	5,000					5,000		5					5
262502-2-083	Port Madison Building	730	Ericksen Ave	Office	5,016					5,016		5					5
262502-2-082	Port Townsend Paper	750	Ericksen Ave	Office	5,016					5,016		1					1
262502-2-081	Winslow Animal Clinic	800	Ericksen Ave	Service			3,000			3,000				1			1
										0							0
Madison Avenue - West Side - Winslow Way to High School Road																	
8061-000-	Winslow Green			Mixed Use	2,203	11,728		2,934		16,865	34	2	10		3		15
272502-4-017	Winslow Financial Center	213	Madison N	Office	3,654					3,654		4					4
272502-4-016	New Law Office	241	Madison N	Office	3,334					3,334		1					1

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272502-4-015	San Carlos Mexican Restaurant	279	Madison N	Restaurant				2,005		2,005					1		1
272502-4-014	Prudential Wells/Eastman	299	Madison N	Office	4,942					4,942		2					2
272502-4-116	Vacant		Madison N	Vacant						0							0
272502-4-010	Karate (former Domsea)	403	Madison N	Service			4,000			4,000				3			3
272502-4-009	Four Swallows Restaurant	481	Madison N	Restaurant				2,342		2,342					1		1
272502-4-007	Madison Avenue Garage		Madison N	Service			2,217			2,217				1			1
272502-4-008	Vacant		Madison N	Vacant						0							0
272502-4-064	Wyatt House		Madison N	Service			1,984			1,984				1			1
272502-1-063	SFR	563	Madison N	SFR						0	1						0
272502-1-062	SFR	595	Madison N	SFR						0	1						0
4099-000-	Townhomes	637	Madison N	Condo						0	6						0
272502-1-060	SFR	671	Madison N	SFR						0	1						0
272502-1-059	SFR		Madison N	SFR						0	1						0
272502-1-058	US West	783	Madison N	Utility					4,000	4,000						1	1
272502-1-057	Winslow Convalescent	835	Madison N	Nursing						0							0
272502-1-022	SFR	937	Madison N	SFR						0	1						0
272502-1-021	SFR	995	Madison N	SFR						0	1						0
272502-1-066	SFR	993	Madison N	SFR						0	1						0
272502-1-019	Dental-Surgical Center	1037	Madison N	Office	2,132					2,132	1	1					1
8076-000	Madison Park Condo's	1057	Madison N	Condo						0	11						0
272502-1-015	SFR		Madison N	SFr						0	1						0
272502-1-014	Dental Center	1145	Madison N	Office	2,306					2,306		1					1
272502-1-016	SFR		Madison N	SFR						0	1						0
272502-1-013	Vision Center	1173	Madison N	Office	2,126					2,126		2					2
272502-1-001	Christian Science Church	1261	Madison N	Church					4,438	4,438						1	1
										0							0
Madison Avenue - East Side - Winslow Way to High School Road										0							0
262502-3-068	Vacant		Madison N	Vacant						0							0
262502-3-138	Chinese Restaurant, bowling alley	190	Madison N	Mixed Use		10,500		2,000		12,500			0		1		1
262502-3-137	Vacant	280	Madison N	Parking						0							0
262502-3-139	Vacant	280	Madison N	Parking						0							0
262502-3-141	Vacant	280	Madison N	Parking						0							0
262502-3-142	Vacant		Madison N	Parking						0							0
262502-3-143	BPA	200	Madison N	Public					6,000	6,000						1	1
262502-3-140	Road into BPA		Madison N	Vacant						0							0
262502-3-064	P&R Madison Avenue Deli	280	Madison N	Retail		2,400				2,400			1				1
4119-000-007	Clean Center	290	Madison N	Mixed Use	2,870		2,870			5,740		1		1			2
4119-000-006	Office Building	328	Madison N	Mixed Use	1,154		250			1,404		4		1			5
4119-000-005	Vacant		Madison N	Vacant						0							0
4119-000-003	B.I. Veterinary Clinic	350	Madison N	Service			4,468			4,468				1			1
4119-000-001	Leonhardt & Associates	382	Madison N	Office	672					672		1					1
4110-000-001	Wyatt Corner	105	Wyatt Way	Mixed Use	500	3,522				4,022							0
262502-2-037	Office Building	138	Wyatt Way	Office	1,672					1,672		4					4
262502-2-036	Apartment	550	Madison N	Apartment						0	14						0
262502-2-035	SFR	590	Madison N	SFR						0	1						0

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262502-2-034	Highpoint Child & Adolescent		Madison N	Office	1,045					1,045		1					1
8090-000-	Madison Avenue Cottages		Madison N	Condo						0	20						0
262502-2-031	Madison Avenue Cottages		Madison N	Condo						0							0
262502-2-025	Vacant		Madison N	Vacant						0							0
262502-2-024	SFR	750	Madison N	SFR						0	1						0
8019-000-	The Madison Condominium	774	Madison N	Condo						0	14						0
262502-2-020	SFR		Madison N	SFR						0	1						0
262502-2-019	Bainbridge Dance Center	844	Madison N	Service			2,000			2,000				1			1
5290-014-00	Eagle's Nest Apartments	920	Madison N	Apartment						0	40						0
262502-2-010	Bainbridge Eyeland Optical	1122	Madison N	Office	3,280					3,280	1	1					1
262502-2-011	SFR		Madison N	SFR						0	1						0
262502-2-064	Vacant		Madison N	Vacant						0							0
262502-2-008	Library	1270	Madison N	Public					6,984	6,984						1	1
										0							0
Wyatt Way - Madison to Ericksen										0							0
262502-2-038	SFR		Wyatt Way	SFR						0	1						0
262502-2-039	Island Homestead Apartments	280	Wyatt Way	Apartment						0	75						0
262502-2-041	Bainbridge Learning Center	344	Wyatt	School	2,502					2,502		2					2
4110-000-003	MacLearnsberry Engineering	159	Wyatt Way	Office	1,274					1,274		1					1
4110-000-004	SFR	163	Wyatt Way	SFR						0	1						0
4110-000-005	SFR	167	Wyatt Way	SFR						0	1						0
4110-000-006	SFR	201	Wyatt Way	SFR						0	1						0
4110-000-007	SFR	271	Wyatt Way	SFR						0	1						0
4110-000-009	Two Duplexes		Madrona Way	Apartment						0	4						0
4110-000-013	Vacant		Madrona Way	Vacant						0							0
Knechtel - Madison to Ericksen (north side only)																	
262502-2-026	SFR	164	Knechtel	SFR						0	1						0
262502-2-027	SFR	192	Knechtel	SFR						0	1						0
262502-2-093	Island Homes	200	Knechtel	Apartment						0	4						0
262502-2-017	Helpline House	282	Knechtel	Public					4,401	4,401						1	1
262502-2-094	Island Homes	220	Knechtel	Apartment						0	7						0
5091-000-005	Vacant		Knechtel	Vacant						0							0
262502-2-016	Water tank		Knechtel	Public						0							0
Wallace Way (Madison to Ericksen)																	
8084-001	Summer House at Winslow	177	Wallace Way	Condo						0	8						0
262502-2-099	Summer House at Winslow		Wallace Way	Condo						0							0
262502-2-092	Winslow Co-Housing		Wallace Way	Condo						0							0
5091-000-001	Winslow Co-Housing	353	Wallace Way	Condo						0							0
8013-	Blue Herron Condominiums		Wallace Way	Condo						0	54						0
5290-000-017	Vacant - Common Area		Wallace Way	Vacant						0							0

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										0							0
										0							0
High School Road - East of Highway 305										0							0
262502-1-002	Hockett & Olsen Automotive	1278	Ferncliff	Service			4,080			4,080				1			1
262502-1-012	Bloedel Photography	1196	Ferncliff	Office	500					500	1	1					1
232502-3-031	Vacant		High School	Vacant						0							0
232502-3-028	Kitsap Bank	10140	High School	Office	6,185					6,185		3					3
232502-3-030	City Property		High School	Vacant						0							0
232502-3-027	Deschamps Realty	10048	High School	Office	1,384					1,384		1					1
232502-3-043	Vacant		High School	Vacant						0							0
232502-3-026	Water well		High School	Utility						0							0
232502-3-036	Lumbermans	10056	High School	Retail		13,000				13,000			1				1
										0							0
262502-2-001	Island Terrace	825	High School	Apartment						0							0
262502-2-079	Vacant		High School	Vacant						0							0
262502-2-078	Ace Hardware - Lindseys	635	High School	Retail		22,000				22,000			2				2
262502-2-076	McDonalds Restaurant	501	High School	Restaurant				3,971		3,971					1		1
262502-2-077	Vacant		High School	Vacant						0							0
High School Road - Highway 305 to Madison										0							0
232502-3-023	Vacant		High School	Vacant						0							0
232502-3-022	Vacant		High School	Vacant						0							0
232502-3-045	American Marine Bank	208	High School	Office	5,866					5,866		1					1
232502-3-046	Virginia Villa Senior Apartments		High School	Apartment						0							0
232502-3-047	Vacant		High School	Vacant						0							0
232502-3-021	St. Cecilia Catholic Church	1310	Madison	Church					19,974	19,974						1	1
			High School							0							0
262502-2-075	Chevron		High School	Service			712			712				1			1
262502-2-088	Seafirst Bank	1200	Hildebrand	Office	3,415					3,415		1					1
262502-2-089	First Interstate Bank	1180	Hildebrand	Office	3,615					3,615		1					1
262502-2-090	Vacant		Hildebrand	Vacant						0							0
262502-2-091	Island Country Inn	920	Hildebrand	Hotel						0							0
262502-2-084	North Sound Bank	901	Hildebrand	Office	8,700		1,300			10,000		2	1				3
262502-2-085	911 Place Office Building	911	Hildebrand	Office	11,000					11,000		5					5
262502-2-086	Vacant		Hildebrand	Vacant						0							0
262502-2-087	Vacant		Hildebrand	Vacant						0							0
262502-2-012	Vacant		Hildebrand	Vacant						0							0
262502-2-097	Payless		High School	Mixed Use		35,764		4,500		40,264			10		3		13
262502-2-096	Coldwell Banker, Puget Power		High School	Mixed Use	4,000	5,000				9,000		2	3				5
262502-2-095	Safeway		High School	Mixed Use	500	48,771				49,271		1	1				2
										0							0
272502-1-003	Rhododendron Apartments	225	High School	Apartment						0							0
	Bainbridge Crest Townhouses	339	High School	Condo						0	11						0
272502-1-006	Dentist - Kitamoto	1298	Grow		3,049					3,049		2					2

Commercial Inventory
Winslow Town Center
City of Bainbridge Island

Parcel Number	Name	Address		Use	Square Feet						Housing	Number of Tenants					
		No.	Street		Office	Retail	Service	Rest	Other	Total	Units	Office	Retail	Service	Rest	Other	Total
4101-003-007	Masonic Temple	1299	Grow						9,524	9,524						1	1
272502-1-027	Bainbridge Dental Park	525	High School		4,466					4,466		2					2
272502-1-028	Group Health	621	High School		4,262					4,262		1					1
272502-1-026	Vacant		High School							0							0
										0							0
					271,560	281,699	53,843	41,688	100,426	749,216		253	80	27	24	16	400

WINSLOW DOWNTOWN PLAN
REGIONAL COMPARISON

DEMOGRAPHIC CONDITIONS	EDMONDS-SOUTH	KIRKLAND-HOUGHTON	MERCER ISLAND	BELLEVUE-CBD	SEATTLE-CBD
POPULATION					
City-1995	31,310	42,350	21,290	102,000	532,900
FAZ					
1990	18,525	20,322	20,816	1,182	6,785
1994	19,295	21,653	21,186	1,253	
Growth 1990-1994	770	1,331	370	71	
2000	19,788	22,133	21,844	3,315	9,908
2010	21,253	23,657	22,056	8,292	13,022
Growth 1994-2000	493	480	658	2,062	
HOUSEHOLDS					
1990	7,919	8,507	8,007	654	3,799
1994	8,190	8,939	8,227	709	
Growth 1990-1994	271	432	220	55	
2000	8,567	9,528	8,636	2,193	6,231
2010	9,580	10,776	9,253	5,945	8,802
Growth 1994-2000	1,390	1,837	1,026	1,484	
MULTIFAMILY HOUSEHOLDS					
1990	3,088	3,211	1,442	570	3,681
2000	3,684	3,940	1,605	2,192	6,024
2010	4,480	4,816	1,887	5,944	8,801
MULTI AS % OF TOTAL-1990	39.0%	37.7%	18.0%	87.2%	96.9%
HOUSEHOLDS BY INCOME					
Lower Income	21.5%	18.4%	11.8%	42.8%	72.2%
Lower Mid Inc.	25.8%	24.6%	12.1%	33.2%	10.7%
Upper Mid Inc.	24.6%	26.6%	17.8%	15.3%	8.3%
Upper Inc.	28.1%	30.4%	58.2%	8.7%	8.7%
EMPLOYMENT-1990	5,782	12,119	5,468	22,257	117,252
REAL ESTATE CONDITIONS					
APT. RENTS (/MO. 2BR/1BA)	$581	$742	$781	$734	$997
CONDO PRICES (/SF NEW PROJECTS)	$90-190	$140-225		$190-350	$150-300
COMMERCIAL CHARACTER	Specialty	Specialty	Nbd./Specialty	Regional	Regional

WINSLOW DOWNTOWN PLAN
REGIONAL COMPARISON

	DENNY REGRADE	LAKE UNION/ SEA. CENTER	QUEEN ANNE	ALKI/ ADMIRAL	FREMONT/ WAL'NGFRD
DEMOGRAPHIC CONDITIONS					
POPULATION					
City-1995					
FAZ					
1990	4,759	9,421	23,468	32,789	15,299
1994	6,527		24,083	33,541	15,704
Growth 1990-1994	1,768		615	752	405
2000	7,081	11,624	24,205	33,659	16,247
2010	10,895	18,148	24,347	34,683	1,615
Growth 1994-2000	554		122	118	543
HOUSEHOLDS					
1990	3,706	5,948	12,334	15,737	8,003
1994	5,027		12,686	16,139	8,239
Growth 1990-1994	1,321		352	402	236
2000	5,706	7,551	13,076	16,584	8,728
2010	9,106	12,347	13,728	17,950	9,240
Growth 1994-2000	679		390	445	489
MULTIFAMILY HOUSEHOLDS					
1990	3,588	4,882	7,638	5,193	4,629
2000	5,546	6,499	8,309	6,047	5,231
2010	9,106	11,756	9,155	7,509	5,877
MULTI AS % OF TOTAL-1990	96.8%	82.1%	61.9%	33.0%	57.8%
HOUSEHOLDS BY INCOME					
Lower Income	61.4%	36.4%	30.3%	26.8%	34.5%
Lower Mid Inc.	17.4%	30.6%	28.8%	26.6%	32.3%
Upper Mid Inc.	10.4%	19.0%	20.1%	23.0%	20.1%
Upper Inc.	10.8%	14.0%	20.7%	23.7%	13.1%
EMPLOYMENT-1990	44,582	40,864	7,854	6,213	9,763
REAL ESTATE CONDITIONS					
APT. RENTS (/MO. 2BR/1BA)			$808	$621	
CONDO PRICES (/SF NEW PROJE	$150-300		$120-150	$150-290	
OMMERCIAL CHARACTER	Regional/Nbd.	Specialty	Nbd./ Specialty	Nbd./ Specialty	Nbd./ Specialty

WINSLOW DOWNTOWN PLAN
REGIONAL COMPARISON

	NORTH CAPITOL HIL	GREENLAKE	RAVENNA/ UNIVERSITY	BALLARD	GIG HARBOR
DEMOGRAPHIC CONDITIONS					
POPULATION					
City-1995					3,890
FAZ					
1990	20,797	19,809	24,179	24,517	8,023
1994	21,186	20,150	25,524	25,089	9,925
Growth 1990-1994	389	341	1,345	572	1,902
2000	20,946	20,214	25,063	25,042	10,391
2010	21,295	20,468	27,373	25,236	14,584
Growth 1994-2000	(240)	64	(461)	(47)	466
HOUSEHOLDS					
1990	10,162	9,611	9,954	12,519	3,186
1994	10,336	9,770	10,173	12,758	3,896
Growth 1990-1994	174	159	219	239	710
2000	10,504	10,069	10,660	13,129	4,172
2010	11,225	10,722	12,441	13,978	6,112
Growth 1994-2000	168	299	487	371	276
MULTIFAMILY HOUSEHOLDS					
1990	4,712	3,241	6,446	6,331	566
2000	4,965	3,759	7,202	6,959	851
2010	5,639	4,696	8,783	8,617	1470
MULTI AS % OF TOTAL-1990	46.4%	33.7%	64.8%	50.6%	17.8%
HOUSEHOLDS BY INCOME					
Lower Income	24.9%	29.3%	41.0%	36.5%	22.0%
Lower Mid Inc.	23.3%	28.7%	30.2%	28.0%	24.9%
Upper Mid Inc.	21.4%	23.2%	17.0%	21.0%	27.5%
Upper Inc.	30.5%	18.9%	11.7%	14.6%	25.5%
EMPLOYMENT-1990	6,437	4,187	12,178	13,006	2,569
REAL ESTATE CONDITIONS					
APT. RENTS (/MO. 2BR/1BA)	$754	$707	$707	$622	$529
CONDO PRICES (/SF NEW PROJE	$130-200	$115-140		$120-150	
COMMERCIAL CHARACTER	Nbd./ Specialty	Nbd./ Specialty	omm./ Specialty	omm./ Specialty	Specialty