



Current Conditions Report



October 2021



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Overview

Martin Way, between Pacific Avenue and Marvin Road, serves as a crucial urban corridor that links multiple jurisdictions across its five-mile stretch. This former state highway connects people throughout the region to homes, businesses, services, and recreation.

1.1 Project Overview

The Martin Way Corridor Study is a joint planning effort between Thurston Regional Planning Council, Thurston County, City of Olympia, City of Lacey, and Intercity Transit. The purpose of the project is to develop a coordinated vision for the future of Martin Way, and identify transportation improvements, regulatory changes, and other tools and infrastructure needs that may be necessary to achieve that vision.

This Current Conditions report lays the groundwork for a consideration of alternative approaches to development along the corridor. Future project steps include:

- **Alternatives Analysis.** The study will consider different options for redevelopment, land use standards, and transportation facilities along the corridor, and identify a preferred alternative that incorporates public input.
- **Implementation and Action Plan.** The action plan will identify strategies to address issues raised in the current conditions report and identify specific infrastructure improvements and opportunities to increase connectivity for everyone who lives, works, and travels Martin Way.

- **Public Engagement.** There are many perspectives on the Martin Way Corridor, and there will be numerous opportunities for members of the public to help shape the results of this study, including through surveys and public meetings.

1.2 Current Conditions Summary

This report summarizes existing conditions along the Martin Way Corridor, including information about the people who live and work within the corridor, land use and transportation patterns, and preferences among the public and business community. It identifies some of the challenges that pose barriers to achieving the corridor vision, as well as opportunities that may be explored in future steps of the project.

Some of the findings from this review include:

- The Martin Way Corridor is currently home to more than 9,000 residents and is the location of more than 13,000 jobs. Under current regulations and projections, the corridor is expected to see an additional 3,000 new housing units and 6,000 new jobs over the next 25 years.

- Corridor residents are more diverse, and more likely to experience poverty and be cost burdened (spending more than 30 percent of household income on housing, including utilities) than the overall population in Lacey, Olympia, and Thurston County as a whole.
- A high proportion of residents rent (56 percent) and live in multifamily units (49 percent), but the corridor includes a diverse mix of housing, including single-family neighborhoods and manufactured home parks. As the corridor's population continues to grow, even more people will live in multifamily housing—about 64 percent by 2045.
- More than 40,000 vehicles travel Martin Way every day, and it's a major route for transit users as well as freight. Pedestrians and bicyclists also use the corridor, but with significant gaps in the sidewalk system, a lack of frequent crossing options, unprotected bike lanes, numerous driveway access points, and auto traffic going 40 mph or faster in places, it can feel unsafe and unfriendly.
- The corridor has a limited supply of remaining vacant land, but the potential for substantial redevelopment of mixed use and commercial areas. Redevelopment presents an opportunity for improvements to street frontages, but faces challenges such as costly infrastructure improvements, environmental constraints, and fractured ownership.

1.3 Public Engagement

TRPC administered two surveys to gather public impressions of the corridor and priorities for future planning.

Corridor Residents and Users Survey. TRPC administered a survey of residents and users of the Martin Way Corridor during Fall 2020. The survey was mailed directly to 8,612 households in September 2020. Residents were able to reply by sending back the paper survey or by taking an online version of the survey. A total of 1,990 surveys were returned, nearly half from corridor residents. Full survey results are summarized in Appendix 1.

- ***What residents like most about living on or near the corridor:*** easy and convenient access Martin Way provides to I-5, small businesses and big chain stores, as well as recreation and services.
- ***What corridor residents would like to see improved:*** traffic signal timing, multimodal infrastructure including continuous sidewalks, trails, and bike lanes, and addressing homelessness.
- ***Improving safety was the top priority among all survey participants for planning the future of Martin Way.*** Aside from safety, there was some variation among different populations when asked to identify their top priorities (see table).

Table 1. Top five issues to address for Martin Way's future among different survey respondents. *Source: Martin Way Residential Survey, 2020.*

Top 5 Issues	Residents	Non-Residents	People of Color	Household Income Less than \$35,000
1	Improve safety for all users	Improve safety for all users	Improve safety for all users	Improve safety for all users
2	Move traffic quickly through the corridor	Move traffic quickly through the corridor	Move traffic quickly through the corridor	Improve accessibility for people with disabilities
3	Increase places to safely cross Martin Way	Increase places to safely cross Martin Way	Increase places to safely cross Martin Way	Improve housing affordability
4	Improve street lighting	Improve accessibility for people with disabilities	Improve accessibility for people with disabilities	Improve street lighting
5	Improve accessibility for people with disabilities	Develop a trail system	Improve street lighting	Increase places to safely cross Martin Way

Business Survey. TRPC partnered with the Thurston Economic Development Council (EDC) to conduct a survey of businesses located along or near the Martin Way corridor. The survey was conducted through a variety of methods, including an online survey, phone interviews, in-person interviews, and email correspondence. Of the 450 businesses along the corridor invited to participate, 80 businesses responded for a response rate of 18 percent. Full survey results are summarized in Appendix 2.

- **Access by car is important to existing businesses on the corridor**, both for serving customers and retaining a quality workforce, and they place less emphasis on the need for pedestrian walkways, convenient bus service, and bicycle access.
- **What businesses say needs improvement:** left turn safety, traffic conditions, landscaping, lighting, parks and paths.

1.4 Key Needs & Opportunities

Based on the review of current conditions and public input, the project team identified the following needs and opportunities. These will help inform the types of treatments that will be considered in the alternatives analysis.

Support for inclusive growth. Alternatives will need to consider how to grow in ways that maintain access to more affordable housing and social services, and limits displacement of the low-income and other established communities that call the corridor home today.

Improve safety for all users of the corridor and all modes.

Alternatives should look at ways to address collision hotspots and contributing factors, and should consider ways to increase the perception of safety with strategies to help pedestrian, bicycle, and transit users and those with disabilities and other access challenges feel they are on equal footing with drivers.

Balance the needs of different users of the transportation network.

The future vision of the corridor foresees high-capacity transit, and increased pedestrian and cyclist use. At the same time, current residents and businesses in the corridor rely heavily on access by private vehicles, and Martin Way

will need to continue to function as a major route for freight, emergency routes, and access to the freeway system. Analysis should carefully assess the potential for conflict among these different users and uses, and identify priorities and strategies to provide the best balance of services to future travelers—whether they drive, haul freight, ride a bike, walk, or use transit.

Increase connectivity. While Martin Way connects people throughout the Thurston County region to shops, homes, offices, schools and more, it also creates a barrier, with limited north/south cross streets and few safe crossings for people walking and biking. The transitions from the high-intensity development directly on Martin Way to adjacent low-density residential neighborhoods are abrupt. Alternatives should identify logical and convenient links among residential areas, commercial nodes, transit stops, and trails.

Improve continuity across jurisdictions. Currently, the application of different standards in areas under different jurisdictional authority can contribute to the disjointed feel of the corridor. Alternatives should look at ways to create a seamless experience for drivers, pedestrians, bicyclists, and transit riders while allowing for some variation based on the individual needs, resources, and characters of each jurisdiction.

Build a sense of place and ownership. Today, most users of Martin Way see it as a route to get through, rather than a place to be. Alternatives should consider ways to beautify and highlight community assets and identify potential hubs or opportunity areas where redevelopment could help ground the corridor and establish its identity.

Figure 1. Aerial image of Martin Way, looking west from College Street. Credit: Thurston County Public Works.



Construction of Martin Way, 1935.
Credit: Washington State Archives



Background

Martin Way is an east-west route that runs 7.5 miles from east Olympia through Lacey and Thurston County, down to the Nisqually Delta. Along its way, it crosses through three watersheds, three jurisdictions, two school districts, and five zip codes. It serves as an emergency alternate route to Interstate 5, which crosses Martin Way at Exit 109, and connects people to major destinations across northeast Thurston County, including health services, schools, and public facilities. This chapter provides the history and context for planning on Martin Way.

Figure 2. 1974 aerial view looking east from Olympia, with Interstate 5 and Martin Way clearly visible. *Credit: Northwest Air Photos, Port of Olympia, Commissioners, Photograph Collection, Washington State Archives.*



2.1 Study Area

This study focuses on the five-mile stretch of Martin Way that runs from the junction of Pacific Avenue in Olympia to the intersection of Marvin Road in Lacey (Map 1). The corridor area includes land roughly within a quarter mile on either side of Martin Way. Although outside the focus area for the study, this report also includes information on the fast-growing section of Martin Way that extends from Marvin Road to the intersection of Meridian and Duterrow Roads, near the border of the Lacey Urban Growth Area. For the purposes of this report, “Martin Way Focus Area” is used to refer to the portion of the corridor west of Marvin Road. “Martin Way Corridor” is used to refer to the full corridor area from Pacific Avenue to Meridian Road.

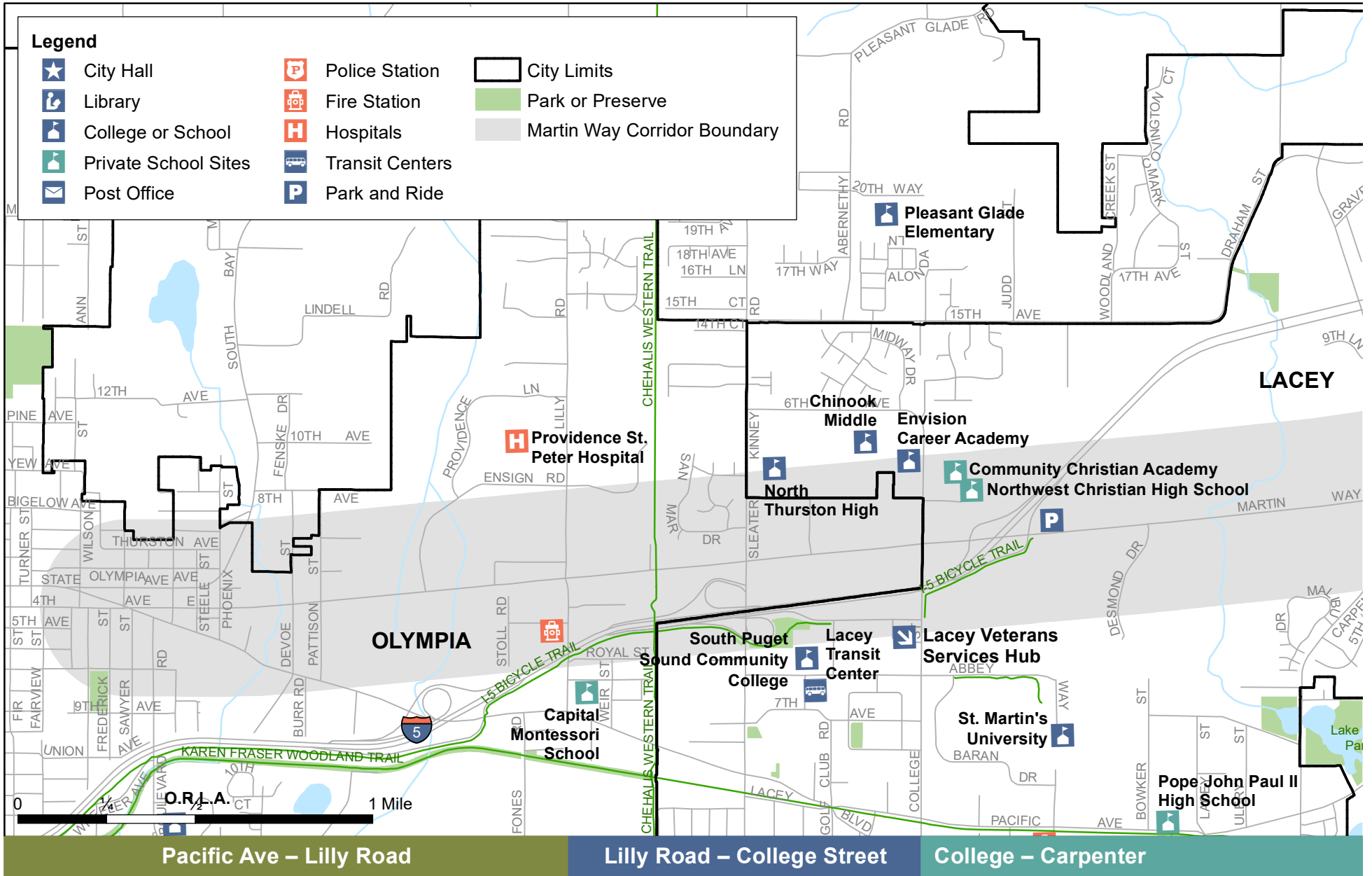
To look at how conditions differ along the corridor, the project team divided it into five segments, at major intersections:

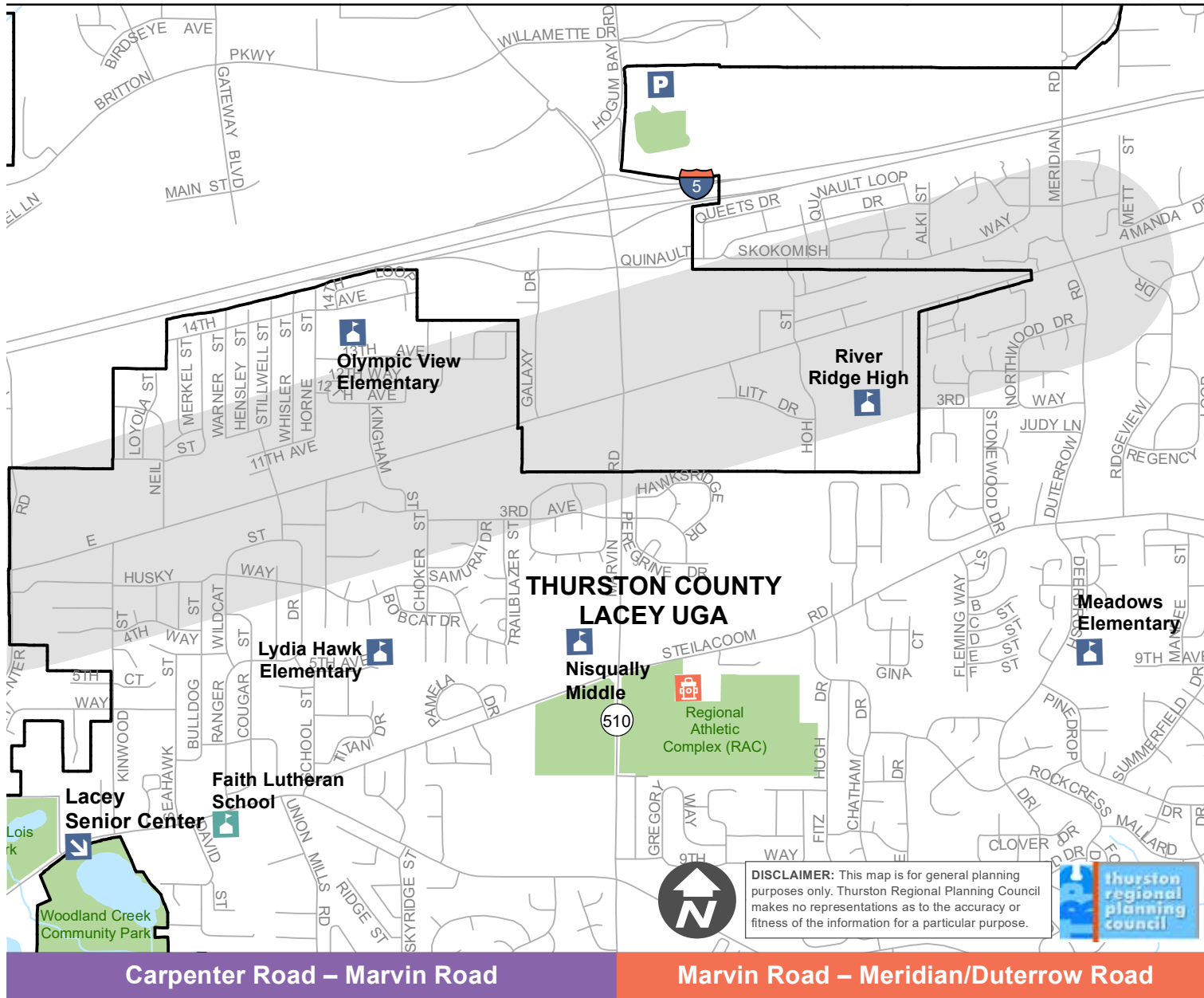
1. Pacific Avenue to Lilly Road
2. Lilly Road to College Street
3. College Street to Carpenter Road
4. Carpenter Road to Marvin Road
5. Marvin Road to Meridian Road/Duterrow Road

These sections are different lengths and areas. Not all information considered for this report is available or meaningful at the segment scale. Some of the data is reported by census tract or other relevant geography.

Chapter 2 Background

Map 1. Martin Way Corridor, showing section breaks and major landmarks.





2.2 Martin Way History

Martin Way opened in 1937 as part of State Road 1 and US Highway 99. It was named in honor of Governor Clarence Martin, a champion of major public works construction projects during the Great Depression, including this more direct route connecting Olympia to Fort Lewis and Tacoma. Martin Way replaced the old Pacific Highway route, which followed the original course laid out for military wagon trains and stagecoaches, winding south around McAllister Springs and avoiding the steepest portion of the Nisqually bluffs. The new route cut straight through a mostly undeveloped portion of northeast Thurston County owned by Saint Martin's Abbey, north of the unincorporated community of Lacey. Its wide, straight lanes promised free-flowing travel for those using the area's fastest-growing transportation mode—the automobile.

Commercial development along Martin Way, most of it oriented to serve cars and their drivers, quickly followed as the region's population and economy grew in the 1940s and 50s. This included a string of motor lodges such as the Lodoro Motel at 3434 Martin Way (opened in 1940), the Holly Motel at 2816 Martin Way (opened in 1942), and the Bailey Motor Inn at 3333 Martin Way (opened in 1946), as well as restaurants and attractions like the Aztec Lanes bowling alley, which was built in 1945. Industrial uses, including small factories and warehouses,

also made use of the open land. Housing and other services came later to the area—most of the corridor's mobile home parks opened between 1940 and 1962 and the Tanglewilde and Thompson Place neighborhoods developed in the late 1950s and 1960s. In 1966—the same year the City of Lacey officially incorporated—the Sisters of Providence purchased land on Lilly Road to build a new hospital that could meet the growing community's need for health care services. By then, plans were again underway to construct a faster travel route through the region. Martin Way was decommissioned as a US Highway in 1968 with the completion of Interstate-5.

Commercial growth continued to extend east along Martin Way, and residential pressure pushed north from Lacey. More offices opened along the corridor, especially near the new medical campus. In 1980, voters approved a local sales tax to fund transit service and create the Public Transportation Benefit Area that eventually became Intercity Transit. River Ridge High School opened in 1993 to relieve overcrowding in other North Thurston schools—the same year the new headquarters of the state Department of Ecology opened at 300 Desmond Drive. Several highway interchanges were reconstructed in the region, and new highway-oriented development followed, introducing more regional and national chain businesses, including gas stations, restaurants, and several hotels.



Figure 3. Survey records show the thickly forested terrain that was cleared and graded to build Martin Way. The top photo was taken in 1933, before road construction, and includes a 400-year-old stump. The bottom photo shows the same location in 1934. *Source: Washington State Archives*

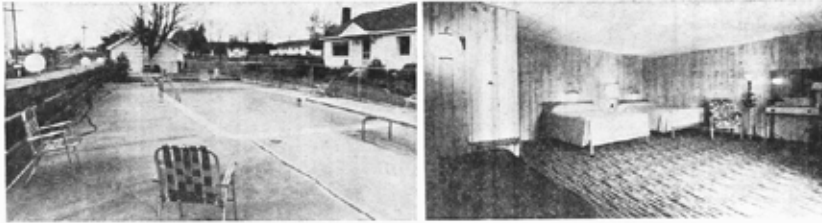
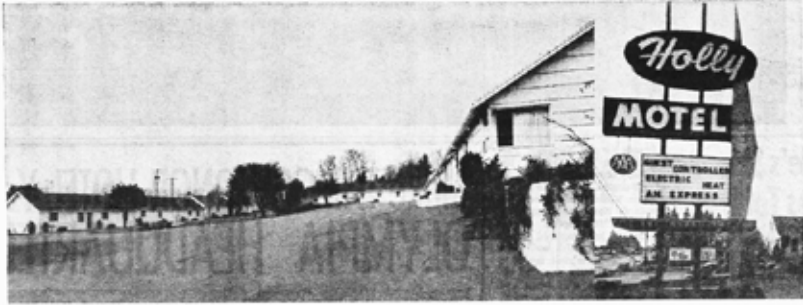
Figure 4. State Road 1 in 1947, looking south from the Nisqually Flats. *Source: Nisqually Flats, Martin Way, 1947, [photographer unknown], State Library Photograph Collection, 1851-1990, Washington State Archives, Digital Archives.*



With the passage of the Growth Management Act in 1990, jurisdictions began to more actively consider ways to plan for and balance the needs of future users of Martin Way. Local Comprehensive Plans and development codes began expressing an intent to shift away from the low intensity, strip commercial and light industrial development that had come to dominate Martin Way, and move toward a more pedestrian-friendly corridor that would have a denser mix of residential and commercial uses.

Despite this vision, the 2000s saw the continued construction of mostly auto-focused commercial uses along Martin Way, including a string of big box retail stores (Lowes [2002], Martin Village [2005], Best Buy [2006], and WinCo [2011]) and low-density storage facilities. More recent construction has seen an increase in apartment complexes in eastern portions of the

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Figure 5. Holly Motel Ad. The Daily Olympian, April 24, 1962. Source: Keyes Family Collection, Washington State Archives.

corridor as well as some redevelopment. Examples include the 2019 conversion of the Bailey Motor Inn into the affordable housing complex Merritt Manor, and new market-rate and senior apartment complexes in the easternmost segment of the corridor. The ongoing renovation and expansion of Intercity Transit's Maintenance, Operations, and Administrative facility at Pattison Street has also brought street improvements, including a new traffic signal, bus stop, and crosswalk.

Landmarks from each era of Martin Way's history are present throughout the corridor today and will continue to shape it as the roadway evolves to meet the needs of future generations.

2.3 Long Range and Comprehensive Plan Visions

The long-range plans of Olympia, Lacey, and Thurston County all envision a vibrant, dense urban corridor on Martin Way as a key strategy for accommodating population growth, supporting economic vitality, and providing less-car-dependent options for residents to meet their daily needs. Each jurisdiction has identified goals and policies for guiding development along Martin Way to support that vision.

Olympia

Olympia’s Comprehensive Plan describes urban corridors as areas where combined employment and residential density support frequent transit and pedestrian access between businesses, and provide a large customer base for businesses. In this vision, corridors should be lined with attractive trees, benches and other landscaping, with more intense commercial uses and multi-story structures located near the street edge, parking lots located behind buildings, and a transition to smaller structures in adjacent neighborhoods. Olympia’s Transportation Chapter identifies Martin Way as a strategy corridor—an area where level of service may fall below adopted standards and alternatives to road widening should be considered to reduce congestion and



Figure 6. City of Olympia sign along Martin Way.

improve mobility—as well as a first priority bus corridor that should have high-quality transit. Olympia’s Comprehensive Plan includes the following goals and policies for the Martin Way Corridor:

- **Land Use**

- o Identifies the intersection of Martin Way and Pacific Avenue as a “Gateway” to the City and its downtown area. (PL14.1)
- o Describes the vision for Martin Way from Pacific Avenue to Lilly Road as transitioning “away from cars being the primary transportation mode to a more walkable environment, where bicycling and transit are also encouraged. Redevelopment of the area will create more density and new buildings that gradually create a continuous street edge and more pedestrian-friendly streetscape.” (PL 13.7)
- o Identifies the Pacific/Martin/Lilly Triangle as a “High-Density Neighborhood” which should be highly walkable and have concentrated housing, as well as commercial uses that directly serve the needs of residents and allow people to meet their daily needs without traveling outside their neighborhood. (PL 14.2)
- o Identifies the area around the intersection of Martin Way and Lilly Road as a Medical Services district, where health care supporting uses (restaurants, florists, child care, convenience shops, multifamily and senior housing nursing homes) are encouraged and non-medical uses that generate high traffic volumes and noise are prohibited. (PL 15.3)
- o Describes the vision for the section of Martin Way east of Lilly Road as one that is primarily, “accessed by motor vehicles with provisions for pedestrian and bicycle travel; gradual transition from existing suburban character is to form continuous pedestrian-friendly streetscapes, but more regulatory flexibility will be provided to acknowledge the existing suburban nature of these areas.” (PL 13.7)
- o Identifies the Stoll Road area adjacent to the Martin Way Corridor as a focus for redevelopment, retail, office and professional services, and high-density housing. (PL 15.4)
- o Although not specific to Martin Way, includes a policy that urban green space be established between transportation corridors and adjacent areas. (PL 7.5)

- **Transportation**

- o Sets a goal for Martin Way as an area where a large portion of trips are made by walking, biking, and transit (GT15). Supporting policies include retrofitting city streets to attract new development and increase density (PT15.1), encouraging public agencies to locate along the corridor (PT15.2 and PT15.3), and partnering with Lacey to coordinate on transportation and land use objectives (PT15.4).
- o Identifies the need for additional east-west corridors and neighborhood collector level roadways to disperse local traffic from Martin Way onto the local street network.
- o Notes congestion and access issues on Lilly Road, north of Martin Way, and identifies a “strategy area” between Martin Way, Lilly Road and Sleater-Kinney Road where new street connections should be considered to address congestion. Potential connections north of Martin Way at 12th or 15th Avenue are identified for future review, as well as an extension of Ensign Road.
- o Identifies several future projects needed on Martin Way, including a roundabout at the intersection of Martin Way/Pacific Avenue/ and Boulevard Road, and dedicated left turn lanes at the intersections with Lilly Road and Sleater-Kinney.

Lacey

Dating back to the adoption of its first comprehensive plan in 1994, Lacey laid out a vision for dense mixed-use development along its portion of the Martin Way Corridor. Lacey divides its urban area into eight planning areas, which have their own policies; Martin Way crosses through four of these (west to east): Pleasant Glade, Central, Tanglewilde Thompson Place, and Meadows.

Lacey's Comprehensive Plan (2016) includes the following guidance for the Martin Way Corridor:

- Identifies the section of Martin Way from Carpenter Road to Galaxy Drive as a prime location for commercial development and notes three Commercial Center "Nodes" at the intersections of Martin Way with Carpenter Road, Hensley Road, and Hoh Street. This section is also identified as the location for a future subarea planning effort to spur private investment and increase character and sense of place.
- Includes a policy to apply different mixes of commercial and high-density land uses along the corridor, based on sensitivity to existing uses.
- Supports maintaining the health of existing businesses, by accommodating the continued operation of existing auto-dependent uses even if they do not meet the intent of the corridor's vision.

Figure 7. City of Lacey sign along Martin Way.



- Suggests a review of the Mixed Use High Density Corridor zone, and the development of a form-based code for the corridor subarea.
- Priorities and policies specific to the Tanglewilde Thompson Place planning area include recognizing the viability of auto-related uses on Martin Way, while also providing pedestrian connections between the corridor and adjacent residential areas. Any review of the mixed-use corridor designation should ensure compatibility with the adjacent low-density residential areas in this section. The plan also includes a goal to promote the extension of sewer service to the residential neighborhoods in the area.
- Priorities and policies specific to the Meadows planning area, include reexamining measures to promote mixed-use residential development along Martin Way (such as development bonuses, multifamily tax exemption programs, and planned action programs); and planning for pedestrian connections between the corridor, surrounding neighborhoods, and the high school.

Thurston County – Lacey UGA

Within the unincorporated portions of Lacey’s Urban Growth Area (UGA), development is permitted by Thurston County, but guided by a Joint Plan between the City of Lacey and Thurston County. Under the region’s Countywide Planning Policies, and supporting planning agreements, cities take the lead on preparing joint plans for the unincorporated portions of their UGAs, which are then adopted by both City and County. These Joint Plans are intended to provide a consistent vision for areas before they are annexed and create a more predictable experience for people living and working in these areas.

In practice, however, this consistency can be challenging to maintain. Since updates to joint plans require a second review and approval process that involves two governments, regulations for the UGA can lag behind those set by a City. The Lacey UGA Joint Plan was last updated in 2010. While it presents the same general vision for the Martin Way Corridor as a mixed use high density district transitioning away from auto-dominated uses with more pedestrian amenities, it also retains some older goals and policies that differ from those

included in the Lacey Comprehensive Plan. For example, policies in the joint plan allow for new auto-related businesses in certain sections of the corridor, while Lacey's updated version emphasizes supporting only existing businesses, and developing incentives for older development to come into compliance with the newer vision. The Joint Plan also does not identify commercial nodes.

Intercity Transit

Intercity Transit's 2018 Short- and Long-Range Plan includes the following information and policies related to the Martin Way Corridor. That plan predates the initiation of the five-year zero-fare demonstration project and the launch of The One, a rapid bus route serving part of Martin Way.

- Identifies performance issues and delays with Route 62 A/B, which runs along the Martin Way Corridor between Lacey and the Olympia Transit Center and is the agency's most popular route in terms of ridership. The Plan makes several recommendations to improve on-time performance, including: adding buses during peak times and to extend the route schedule, increasing service coverage to the rapidly growing employment sites in

northeast Lacey, and rerouting to avoid difficult left turns from Martin Way onto Galaxy Drive.

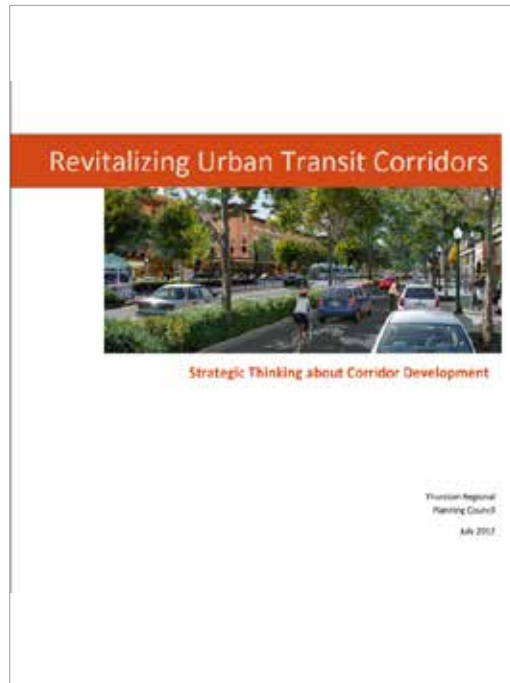
- Notes that the Smart Corridors project will include building transit signal priority along the Martin Way Corridor, with Phase II from Pacific Avenue to Lowes (just past Sleater-Kinney), and Phase III along the remainder of Martin Way.
- Identifies the Meadows neighborhood south of Martin Way as an area with a high propensity for transit, based on socio-economic factors including income, rental status, people with disabilities
- Recommends bus rapid transit (BRT) on Martin Way, to Marvin Road. Components of BRT would include half-mile bus stop spacing, transit signal priority, branding, enhanced stops, and real-time arrival information
- Recommends a new route connecting northeast Lacey job centers to the Lacey Transit Center. In the short term, this area will be served by an extension of Route 62A. The proposed route would follow Sleater-Kinney Road, avoiding Martin Way.

2.4 Past Projects

The Martin Way Corridor Study builds on previous work in the region, including the following studies and reports:

Revitalizing Urban Transit Corridors (2012)

Thurston Regional Planning Council commissioned an Urban Corridors Task Force in 2009 to identify measures needed to overcome barriers to achieving more compact, transit-supportive land use patterns in the metropolitan area of Lacey, Olympia, and Tumwater. The Task Force recommended that these jurisdictions take a more active role in partnering with the development community to stimulate mixed-use development along primary urban corridors, including Martin Way. The report included “modest measures” like creating an inventory of vacant and publicly-owned properties and identifying priority investment locations; “moderate measures” like developing investment strategies, employing form-based codes, and reviewing impact fees; and “mighty measures” like establishing a community lending pool and a corridor development partnership.

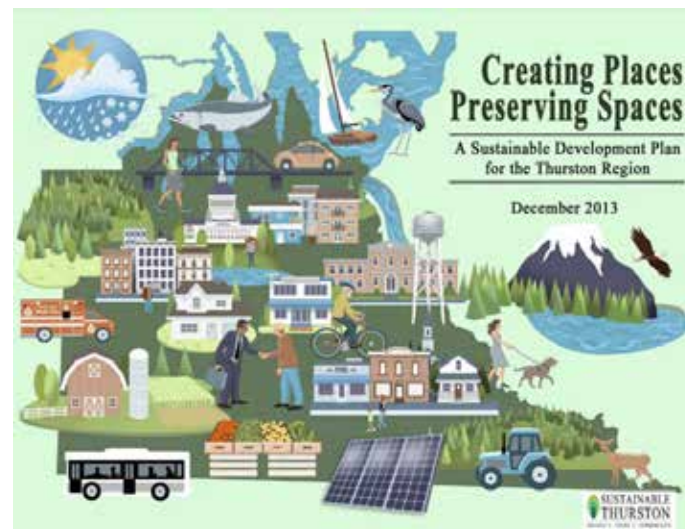


Sustainable Thurston (2013)

This communitywide conversation set a vision for how the Thurston region should look, function, and feel in 2035. It identified a priority goal to create vibrant centers, corridors, and neighborhoods while accommodating growth. The target set for achieving this goal is that by 2035, 72 percent of all new and existing households will be within a half mile—or a 20-minute walk—of an urban center, corridor or neighborhood center where access to goods and services can meet some of residents' daily needs.

The plan identified district planning for the Martin Way Corridor as a key action to achieve that goal. Other relevant actions identified in the plan include:

- Rethink existing land-use zoning and regulations to allow for a greater mix of uses and densities to support efficient provision of services.
- Invest public money to attract private investment in development projects. Create an investment strategy for critical infrastructure and place-making amenities (e.g., street trees, sidewalks, bike lanes, and traffic-calming devices) – C-1.02
- Encourage efficient use of land and building form that encourages walkability. Steps include: enforcing maximum parking requirements or eliminating minimum parking requirements altogether to reduce large expanses of surface parking. Consider strategies such as shared parking, charging for parking, and other means to reduce the need for large amounts of land used for parking. – C-1.03

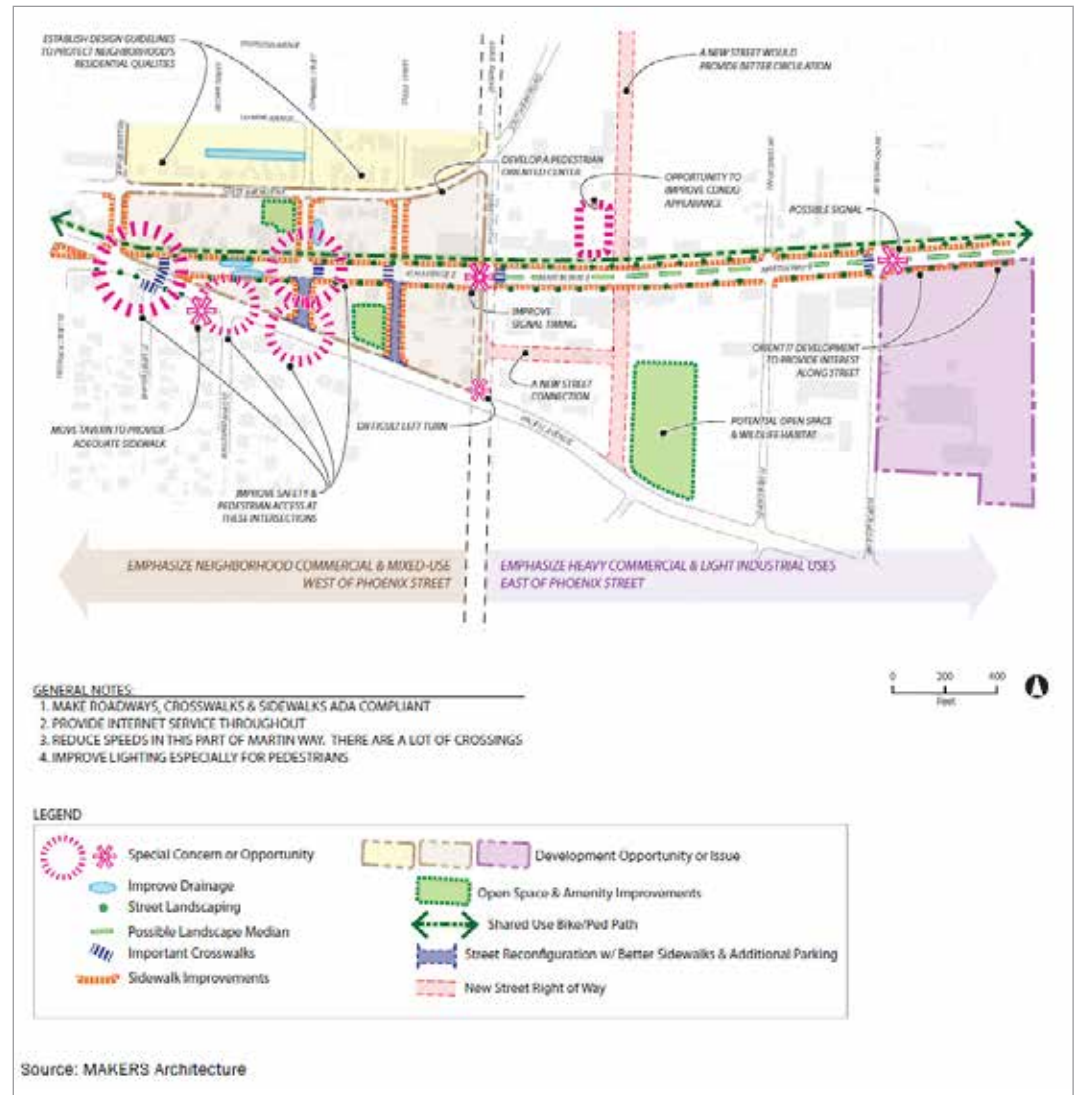


- Utilize incentives to improve financial viability for infill and redevelopment projects. This includes: Special Valuation Multi-family tax program, reducing or eliminating impact fees, using Purchase of Development Rights (PDR) or Transfer of Development Rights (TDR) programs that have been tested for feasibility, waiving stormwater fees for a number of years, providing frontage and utility improvements, eliminating connection charges, etc. – C-1.05
- Work with private financial institutions to provide innovative financing tools to supply credit for center or corridor projects. This includes: creating a community lending pool to supply credit for projects (e.g., spreading the financial risk among several local banks or investors); and other tools and programs that will help the financial viability of projects. – C.1.06
- Form partnerships and do market analyses to identify priority opportunities for center and corridor development. Create conditions that attract investments in center projects. This includes: building infrastructure as part of a project to make it financially viable; working with state and local governments to maintain and build their offices in urban centers; and, forge a regional agreement to support center-focused development. – C.1.07
- Review and update as appropriate individual jurisdictions' architectural and design guidelines and ensure design review procedures and boards are capable of effectively considering unique needs of urban and mixed-use projects. Consider contracting with an urban architect specifically to support center and corridor development by identifying ways to meet cities' design expectations. – C-1.09
- Create public-private or public-public land swap strategies to reduce the cost and risk of investments in centers and corridors. This includes considering swapping public lands that are underused and that could be developed more strategically by another government agency or private interest. This also includes amassing parcels in strategic locations and reselling them to a private development partner, or participating in a public-private development opportunity within the bounds of existing law. – C-1.10
- Form a multiagency partnership to foster conditions that attract investments in center and corridor projects. This entails collaborating among center and corridor communities, identifying opportunities, and recruiting developers. – C.1-11

Martin Way District Study (2014)

This study focused on Olympia’s portion of the corridor, between Wilson Street and Lilly Road and looked at whether infrastructure improvements could contribute to redevelopment of a vibrant, mixed use district. A market study completed by ECONorthwest found that while there were transportation, stormwater, and utility improvements needed in the district, these were not posing immediate barriers to development or redevelopment. Instead, the study identified low property values, low rents, and a large supply of competing locations as the primary impediments. These market factors led to the conclusion that private development would be unlikely to fund large-scale infrastructure improvements, such as an extension of Ensign Road to Pacific Avenue that would improve connectivity, and that infrastructure investments by the City would not be sufficient to trigger redevelopment under the market conditions that existed at the time.

Figure 8. Urban Design Suggestions from a 2014 Public Workshop Held as Part of the Martin Way District Study



Source: MAKERS Architecture

A public workshop helped identify community preferences for the area, including locations for safety improvements, signal timing, street connections, and open space (Figure 5). Infrastructure needs identified for this district included:

- An incomplete sidewalk network with significant gaps
- A high stress bicycle environment due to vehicle volumes and speeds
- A lack of north-south street connections
- A better understanding of the stormwater infrastructure needs and costs

Given the findings of the market study, the project recommended the City consider small projects that address safety issues, look for partnerships, and develop a funding strategy that would help fill the gaps in the pedestrian and bicycle network without waiting for improvements to be built by private development.

Lacey Pedestrian and Bicycle Plan (2018)

This plan identifies policies, programs, and infrastructure recommendations to improve the connectivity, safety, and comfort of the City's walking and biking networks. It is incorporated into Lacey's Comprehensive Plan, as a supplement

to its Transportation Element. The plan identified a number of challenges that apply within the Martin Way Corridor, including:

- Sidewalk gaps, including lack of sidewalk connections to transit stops along major roads
- Missing pedestrian connections to schools, commercial areas, and parks
- Gaps in bike network, including lack of bicycle lanes in Urban Growth Area
- Existing bike facilities do not provide a high level of comfort for less confident bicyclists

The plan also recommended a number of improvements along Martin Way, including:

- New crossing at Martin Way and Galaxy Drive
- Pedestrian Focus Routes associated with Lydia Hawk and Olympic View Elementary schools and River Ridge High School
- Sidewalk connections:
 - o Martin Way, from College Street to Duterrow Road (in Urban Growth Area)
 - o Carpenter Road, from Martin Way to Draham Street/ Britton Parkway (in UGA)

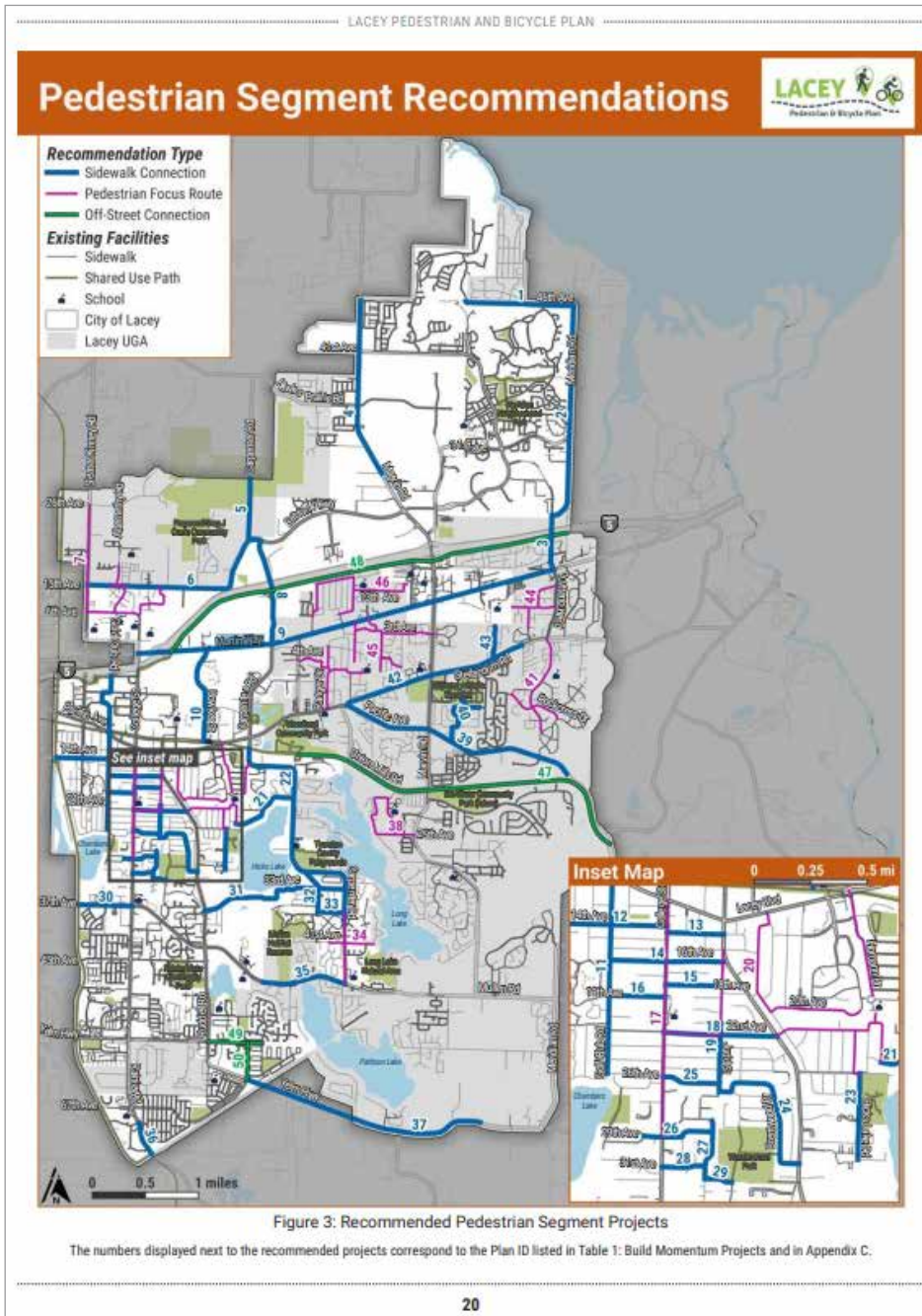


Figure 9. Map of Pedestrian Recommendations from the Lacey Pedestrian and Bicycle Plan—a need for sidewalk connections is noted along Martin Way.

- o Bowker Street (Pacific Avenue to Martin Way)
- o Orion Drive, from Martin Way to Meridian Road (in Urban Growth Area)
- Bike segments:
 - o Martin Way from College Street to Duterrow Road (in Urban Growth Area)
 - o Carpenter Road, from Mullen Road to Martin Way
- A new collector with bike and pedestrian infrastructure using Bowker Street and Desmond Drive to connect Pacific Avenue and Martin Way
- An off-street connection of the I-5 Trail from Martin Way to Duterrow Road
- Improved pedestrian and bicycle wayfinding for crossing at Martin Way and Carpenter Road
- A major reconstruction of the Martin Way interchange with I-5 that provides bicycle separation and installs lighting to improve visibility of pedestrian and bicyclists under the I-5 overpass
- Modification of traffic signal timing at Martin Way and Galaxy Drive to allow pedestrians to get ahead of vehicles.
- Installation of wayfinding signage and traffic calming elements along Kinwood Street from Pacific Avenue to Martin Way

Regional Transportation Plan (2020)

The Regional Transportation Plan (RTP) is developed by Thurston Regional Planning Council every five years to identify transportation goals and needs across the Thurston region over the next 20-25 years. In addition to the Martin Way Corridor Study, the RTP identified the following regional transportation priorities within the corridor area:

- Major reconstruction of the Martin Way interchange with I-5
- Carpenter Road widening from Martin Way to Britton Parkway
- College Street NE extension from Martin Way to 15th Avenue NE
- Ensign Road extension from Martin Way to Pacific Avenue
- Frequent, high capacity bus service (Bus rapid transit or “BRT light”) along the Martin Way Corridor, from Marvin Road to downtown Olympia
- Rehabilitation and expansion of the Intercity Transit Headquarters at Pattison Street
- Construct a new transit stop and transit-only access to the Martin Way Park & Ride from I-5
- Study to extend Desmond Drive from Martin Way to Pacific Avenue

Olympia Transportation Master Plan (2021)

This plan focuses on infrastructure improvements needed to achieve the City of Olympia’s transportation vision “to build a street system that supports walking, biking, and riding the bus, as well as driving.” The plan identifies numerous priority improvements within the Martin Way Corridor that the city should undertake in the next 20 years, including:

- A major street reconstruction of Martin Way from Phoenix Street to Lilly Road: The tentative scope of this project includes enhanced bike lanes, sidewalks, planter strips, stormwater facilities, new lighting, transit improvements, enhanced crosswalks, and medians. This reconstruction project would include many of the projects noted below.
- Enhanced crosswalks at 10 high-priority locations on Martin Way, and two locations within the corridor (see Figure 7). An enhanced crosswalk may include bulb-outs, a crossing island, or flashing beacons, among other features.
- Enhanced bike lanes along Martin Way from Phoenix Street to Lilly Road to create a low-stress bicycling network.

- Intersection improvements, including two roundabouts at the intersection of 4th Avenue, Pacific Avenue, and Martin Way. Roundabouts are planned at the intersections of Martin Way with Ensign, Lilly, and Sleater-Kinney roads, but are not on the city’s 20-year project list.
- Pedestrian and bike safety intersection improvements at Lilly Road and Martin Way.
- Transit improvements along Martin Way, including Transit Signal Priority at the Pacific Avenue intersection (partially complete), queue jump lanes at the intersection of Lilly Road and in-lane bus stops.

The Transportation Master Plan identifies Lilly Road as in need of a future corridor evaluation to address transportation needs, including a lack of bike lanes and sidewalks, support for improved transit operations, traffic congestion, and a lack of street connectivity. It also identifies Pacific Avenue as a location for prioritized improvements for people walking and biking.

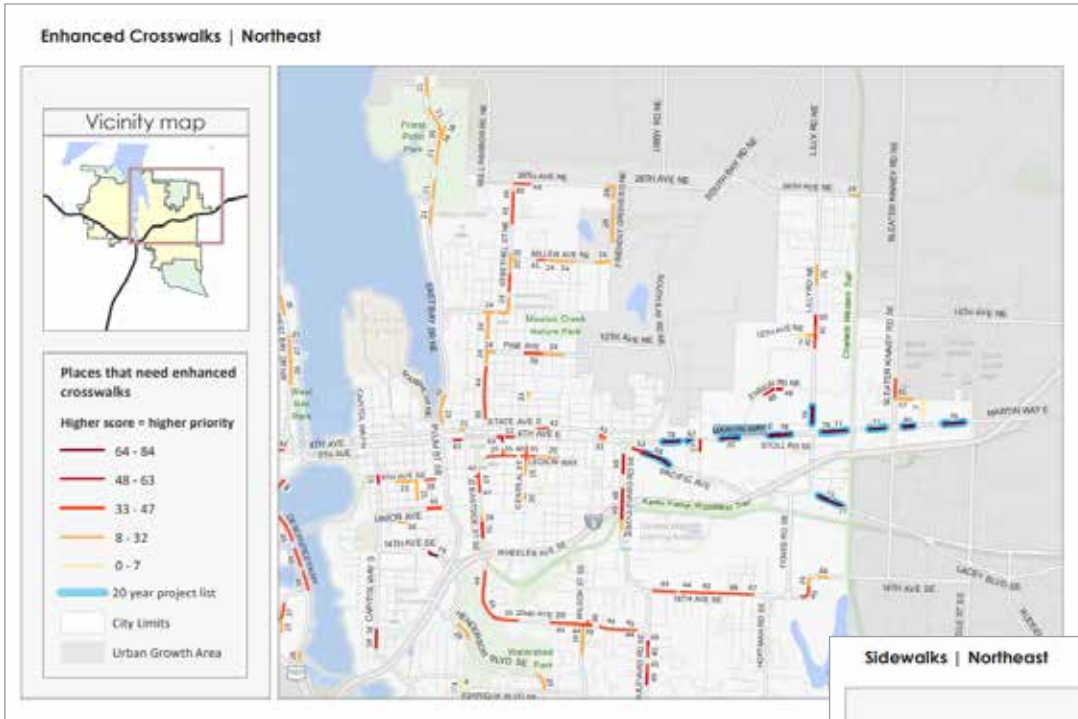


Figure 10. Map of planned enhanced crosswalk projects in the Olympia Transportation Master Plan. Highlighted projects are prioritized for the city’s 20-year project list—even if the highlighted areas are within the Martin Way Corridor.

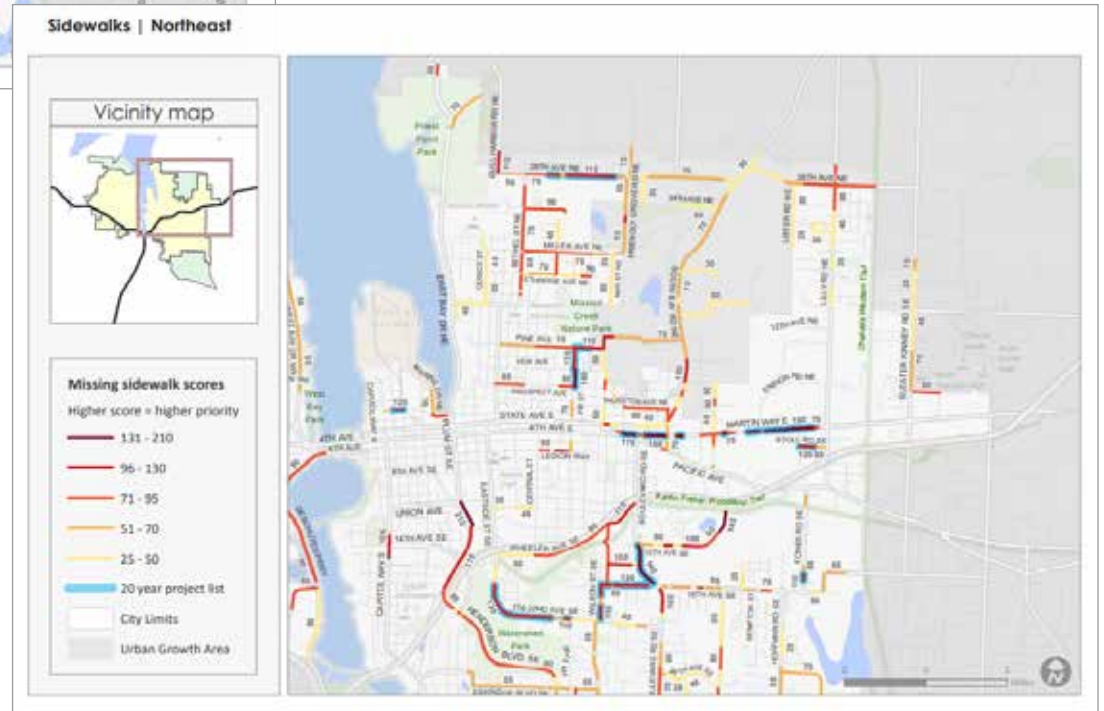


Figure 11. Map of needed sidewalk improvements in the Olympia Transportation Master Plan. Highlighted projects are prioritized for the city’s 20-year project list—many are located on the Martin Way Corridor.



3

Corridor Characteristics

Martin Way is home to a diverse mix of residents, businesses, and services that make the corridor a touchstone for the region as well as an economic driver. The area is slated to grow significantly in the coming years. This chapter looks at who lives and works in the Martin Way Corridor.

3.1 Study Area and Data Sources

As noted in section 2.1, the Martin Way Corridor Study focuses on the five-mile stretch of Martin Way that runs from the junction of State and Pacific Avenues in Olympia to the intersection of Marvin Road in Lacey, but this report also considers the section of Martin Way that extends to the intersection of Meridian and Duterrow Roads. For the purposes of this report, “Martin Way Focus Area” is used to refer to the portion of the corridor west of Marvin Road. “Martin Way Corridor” is used to refer to the full corridor area from Pacific Avenue to Meridian Road. The corridor area includes land roughly within a quarter mile on either side of Martin Way, and is divided into five segments, at major intersections:

1. Pacific Avenue to Lilly Road
2. Lilly Road to College Street
3. College Street to Carpenter Road
4. Carpenter Road to Marvin Road
5. Marvin Road to Meridian Road/Duterrow Road

To understand how the corridor compares across its length and with the broader region, information is shown on a section, city, and county basis, where that level of data is available. The data in this chapter is mainly drawn from two sources: Thurston Regional Planning Council’s 2018 Population and Employment Forecast and the U.S. Census Bureau’s American Community

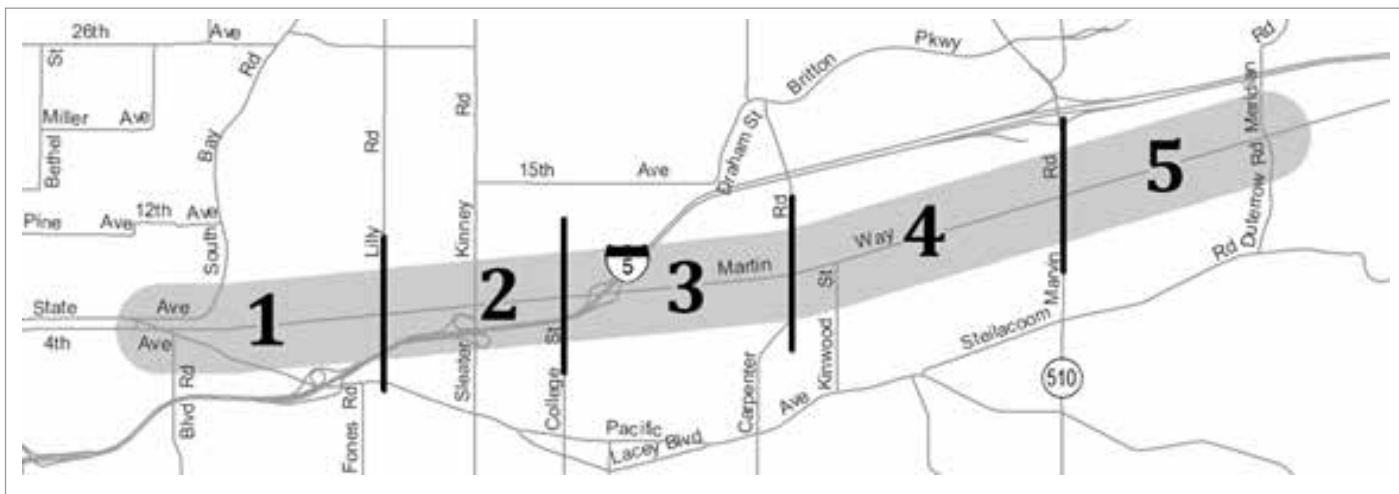


Figure 12. The Martin Way Corridor and segments.

Survey (ACS) estimates for the period of 2014 of 2018. ACS estimates for corridor segments are weighted averages, based on the percent of census block group population in each corridor segment.

3.2 Residents

The Martin Way Corridor is home to approximately 9,000 people (Table 2). Two-thirds of that population lives within the study’s Focus Area, from Pacific Avenue to Marvin Road. An additional third live in the extra section extending from Marvin Road to Meridian Road, making this the most populous stretch. The section of the corridor from College Street to Carpenter Road has the fewest residents. The population of the corridor is projected to increase significantly over the coming decades, growing by more than half in the next 25 years.

Figure 13. Martin Way Corridor Population, 2017-2045. Source: Thurston Regional Planning Council, Population and Employment Forecast (2018 Update).

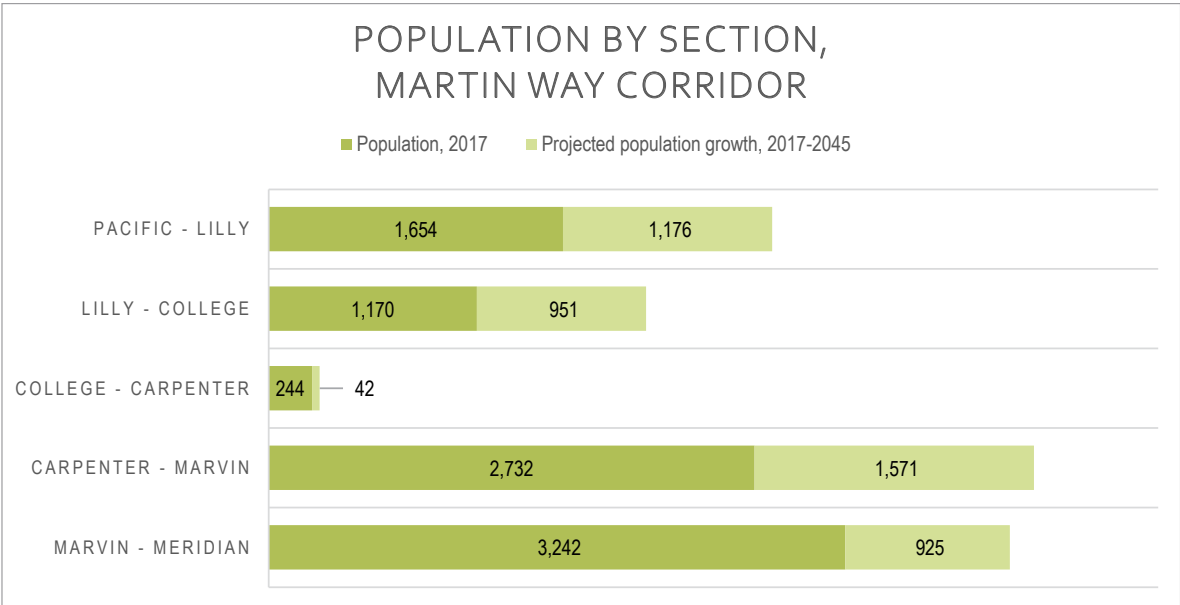


Table 2. Martin Way Corridor Population, 2017-2045. *Source: Thurston Regional Planning Council, Population and Employment Forecast (2018 Update).*

Corridor Sections	2017 Population	2045 Population	% Increase in Population, 2017-2045
Pacific - Lilly	1,654	2,831	71%
Lilly - College	1,170	2,122	81%
College - Carpenter	244	287	17%
Carpenter - Marvin	2,732	4,302	58%
TOTAL, Martin Way Focus Area	5,801	9,541	64%
Marvin-Meridian	3,242	4,167	29%
TOTAL, Martin Way Corridor	9,043	13,708	52%

Demographics

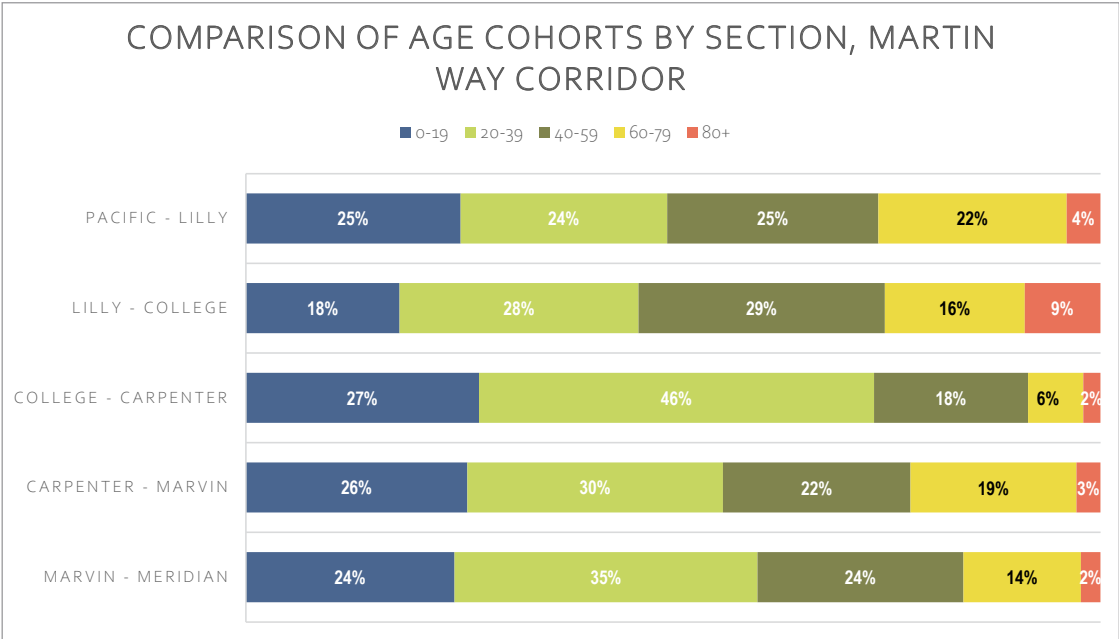
Age

Viewed as a whole, the population of the Martin Way Corridor is representative of age classes in the rest of Thurston County (Table 3). About one quarter of the population are those age 19 and under, and another fifth are over age 60. Age varies in different parts the corridor, however, with the highest concentration of residents over the age of 80 living in the section between Lilly Road and College Street, near the hospital and medical services, and a larger population of younger residents (under 20) in the eastern sections (Figure 14).

Table 3. Age of Residents of the Martin Way Corridor, compared with Thurston County, Lacey, and Olympia. *Source: U.S. Census Bureau, American Community Survey, 2014-2018.*

Age Cohort	Martin Way Corridor	Thurston County	Lacey	Olympia
0-19	24%	24%	26%	20%
20-39	31%	27%	31%	33%
40-59	24%	26%	22%	24%
60-79	17%	19%	16%	19%
80+	4%	4%	5%	4%

Figure 14. Age of Residents of the Martin Way Corridor, by Section. *Source: U.S. Census Bureau, American Community Survey, 2014-2018. Note that the College-Carpenter section has relatively few residents compared to other sections.*



Veteran Status

With its proximity to Joint Base Lewis-McChord (JBLM), the Martin Way Corridor is home to many veterans and military personnel. The concentration of veterans increases along the corridor from west to east—a fifth of the residents in the section from Marvin Road to Meridian Road are veterans.

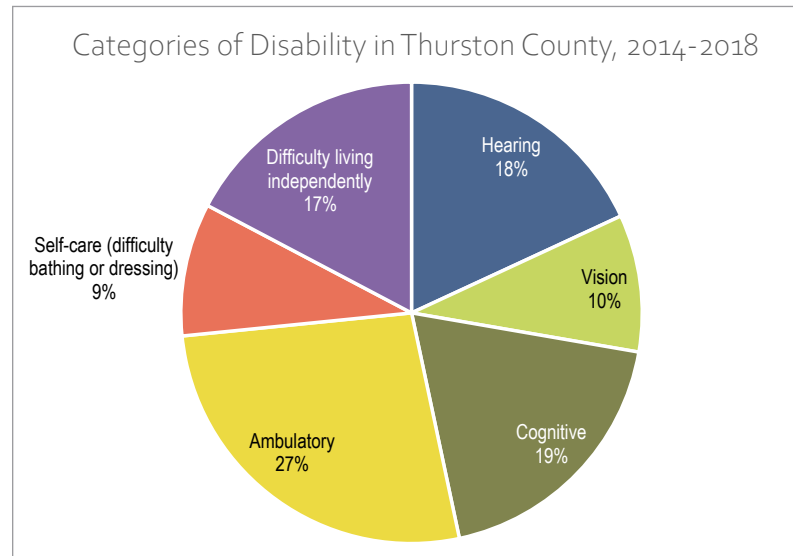
Table 4. Veteran Population in the Martin Way Corridor, Thurston County, Lacey, and Olympia. *Source: American Community Survey, 2014-2018.*

	Proportion of Population Who is a Veteran
Martin Way Corridor	15%
Pacific-Lilly	10%
Lilly-College	12%
College-Carpenter	4%
Carpenter-Marvin	16%
Marvin-Meridian	20%
Thurston County	16%
Lacey	19%
Olympia	10%

Disability

One in seven Martin Way residents live with a disability (14 percent)—this is similar to the proportions recorded for residents of Thurston County, Lacey, and Olympia in general. While information on type of disability is not available at the corridor scale, ambulatory disabilities—having serious difficulty walking or climbing stairs that may or may not necessitate the use of a wheelchair—are the most common type of disability among Thurston County residents (Figure 15). Seniors are more likely to be living with one or more disabilities. The needs of disabled community members should be considered when designing future improvements for the Martin Way Corridor.

Figure 15. Types of Disability in Thurston County. *Source: American Community Survey, 2014-2018.*



Race, Ethnicity, and Language

The Martin Way Corridor is among the most diverse areas of Thurston County. More than a third of residents identify as a person of color, which includes those who identify as Hispanic of any race or any race other than white. Compared to Thurston County as a whole, the corridor is home to higher proportions of people who identify as Hispanic (15 percent), Asian (9 percent), black or African-American (4 percent), or multiracial (10 percent). The sections from College Street to Carpenter Road and Marvin Road to Meridian Road are the most diverse portions of the corridor; nearly half the residents in these areas identify as a person of color.

Figure 16. Racial and Ethnic Diversity of Residents of the Martin Way Corridor, by Section and Compared to Surrounding Jurisdictions. *Source: American Community Survey, 2014-2018*

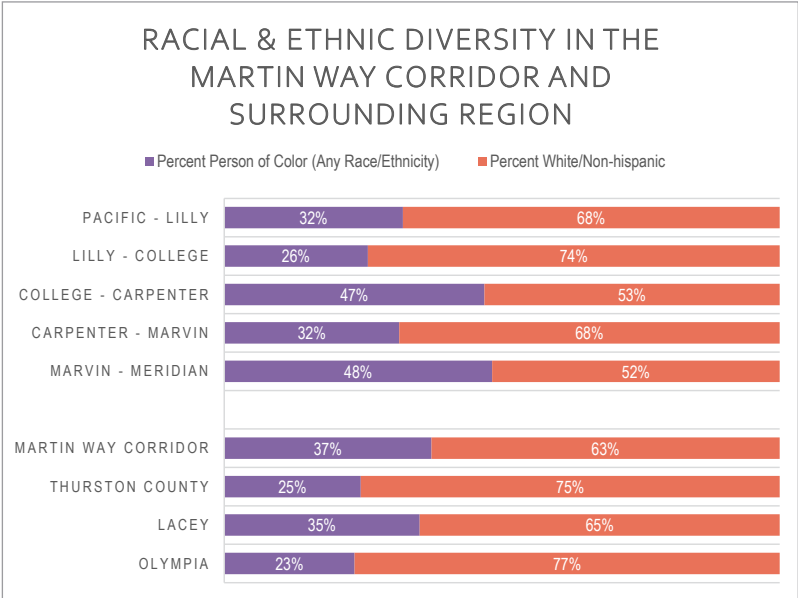


Table 5. Ethnicity and Race of Residents of the Martin Way Corridor, Compared with Thurston County, Lacey, and Olympia. *Source: U.S. Census Bureau, American Community Survey, 2014-2018. *Includes respondents who may be Hispanic or non-Hispanic.*

	Martin Way Corridor	Thurston County	Lacey	Olympia
Ethnicity				
Hispanic (of any race)	15%	9%	11%	8%
Race				
Black/African American*	4%	3%	6%	3%
American Indian/Native Alaskan*	1%	1%	1%	1%
Asian	9%	6%	9%	7%
Native Hawaiian/Other Pacific Islander*	<1%	1%	2%	<1%
Multiracial*	10%	6%	8%	5%
White/Non-Hispanic	63%	75%	65%	77%

Chapter 3 Corridor Characteristics

The Martin Way Corridor is also home to many immigrants, as well as people born in the United States who maintain cultural ties to other countries. Korean, Vietnamese, Filipino, and Latin American communities are the most visible along the corridor, but many ethnicities are present. Thurston County's Hispanic population includes people whose roots can be traced to many different Spanish-speaking areas—most commonly Mexico, Puerto Rico, and Central American countries, including Honduras, Guatemala, and Panama. While only 12 percent of corridor residents were born outside the United States—

roughly the same percentage as for the Thurston County region (13 percent)—about one in five residents speak a language other than English at home (21 percent), compared with 14 percent for Thurston County residents as a whole. About 4.7 percent of households in Census tracts overlapping the Martin Way Corridor are considered “limited English speaking” (568 households). Of these, the majority are either Spanish-speaking (41 percent) or Asian and Pacific Island language-speaking households (39 percent).

Income and Poverty

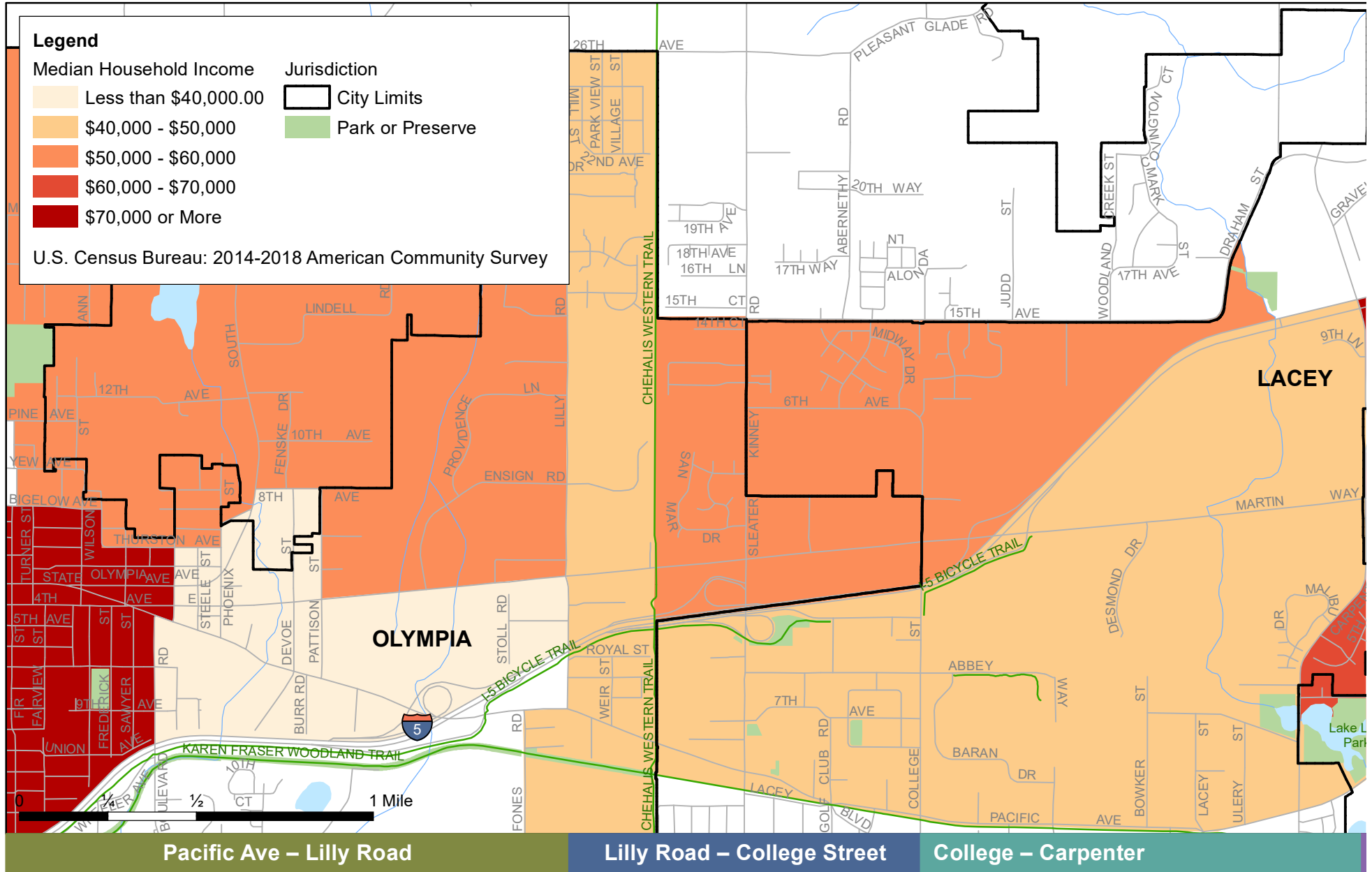
Household income varies considerably across the corridor, as shown in Map 2. When compared to median incomes for Thurston County or the Cities of Lacey and Olympia, some neighborhoods have higher incomes and others have very low-income populations. This wealth disparity can mask that a significant proportion of the corridor’s residents may be struggling to meet their basic needs. Residents of the Martin Way Corridor experience higher rates of poverty than is typical

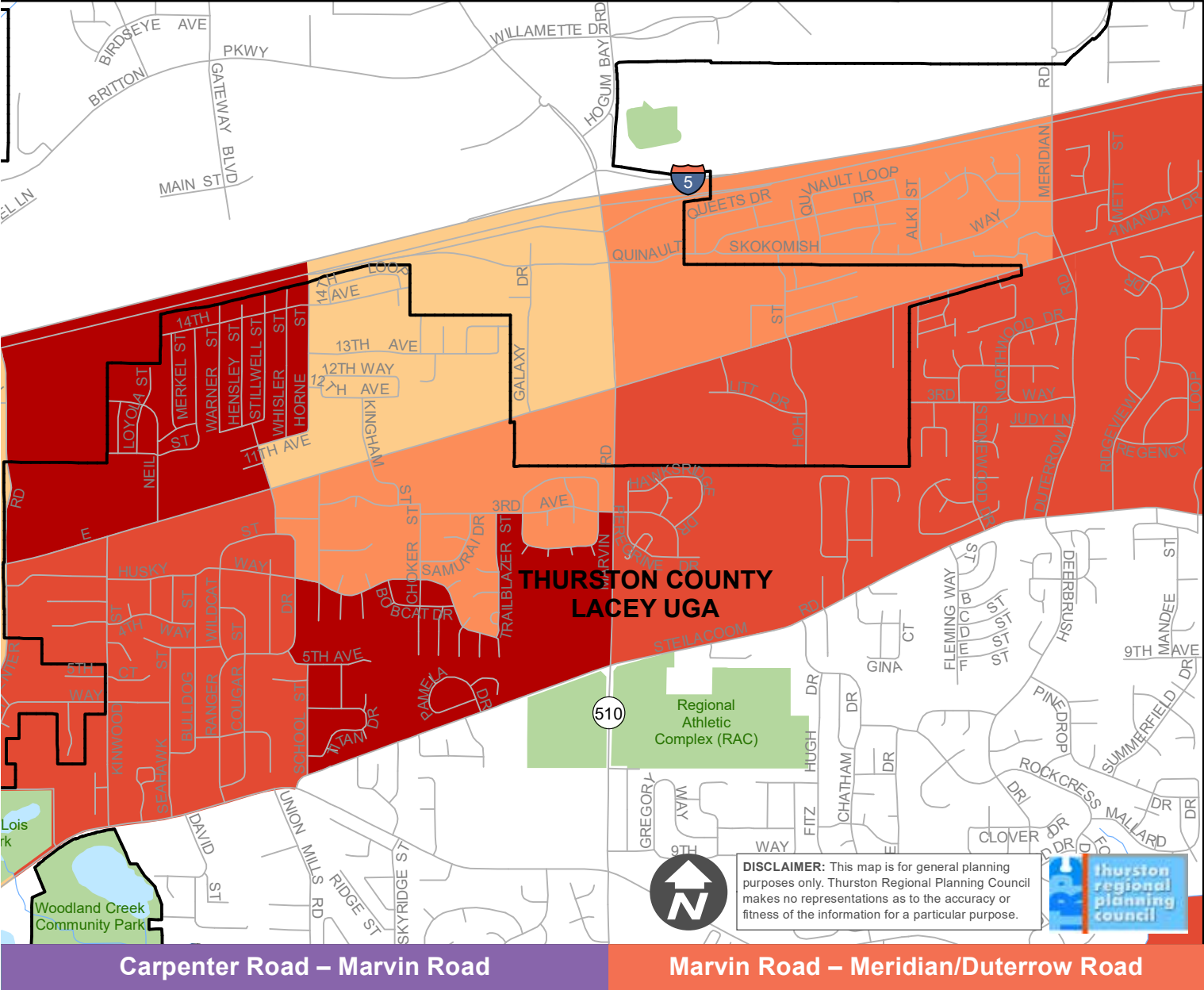
in the surrounding communities. Two out of five corridor residents are considered cost-burdened, which means that they spend a high proportion of their income on housing, and one-fifth of households are considered severely cost burdened. These households typically have less income available for transportation, health care, and other needs. Cost-burden and poverty levels are highest in the westernmost section of the corridor, between Pacific Avenue and Lilly Road.

Table 6. Median Income, Poverty, and Cost-burden of the Martin Way Corridor, compared with Thurston County, Lacey, and Olympia. Source: American Community Survey, 2014-2018.

	What does it measure?	Martin Way Corridor	Thurston County	Lacey	Olympia
Median Household Income	The income level at which half of households in the area earn more, and half earn less.	Varies, see Map 2	\$69,592	\$66,675	\$58,606
Poverty Rate	The percent of households earning an income below the federal estimate of the minimum amount needed to meet basic needs. In 2018, the poverty threshold for a two-person household in Thurston County was \$16,247.	16%	11%	10%	17%
Cost Burden (>30%)	Percentage of all households that spend 30% or more of their household income on housing.	39%	33%	36%	38%
Severe Cost Burden (>50%)	Percentage of all households that spend 50% or more of their household income on housing.	20%	13%	14%	17%

Map 2. Median Household Income in the Martin Way Corridor, by Census Tract.





Housing

Homeowners and Renters

As a high-density corridor, housing looks different along Martin Way than in other parts of the region. About half of all corridor residents (49 percent) live in multifamily units and ten percent live in manufactured housing, including in one of the nine manufactured home parks in the corridor. Around two percent of the population lives in group quarters like a nursing facility or care home—these are concentrated in the Pacific Avenue to Lilly Road section near Providence St. Peter Hospital. About 40 percent of the corridor’s residents live in single-family homes, typical of Olympia’s Eastside neighborhood and the Tanglewilde and Thompson Place neighborhoods in the Lacey Urban Growth Area.

This trend towards multifamily living is likely to intensify in the future; TRPC’s population estimates indicate that by 2045 two out of three corridor residents (64 percent) will live in a multifamily development, while less than a third (27 percent) will live in a single-family home. More than 90 percent of the population anticipated over the next 25 years is expected to be housed in multifamily development.

The corridor also has a higher proportion of renters (56 percent) than the Thurston County region (36 percent), Lacey (46 percent), or Olympia (54 percent).

Unhoused Population

The Martin Way Corridor is also home to many people without permanent housing. Demographic and population data like

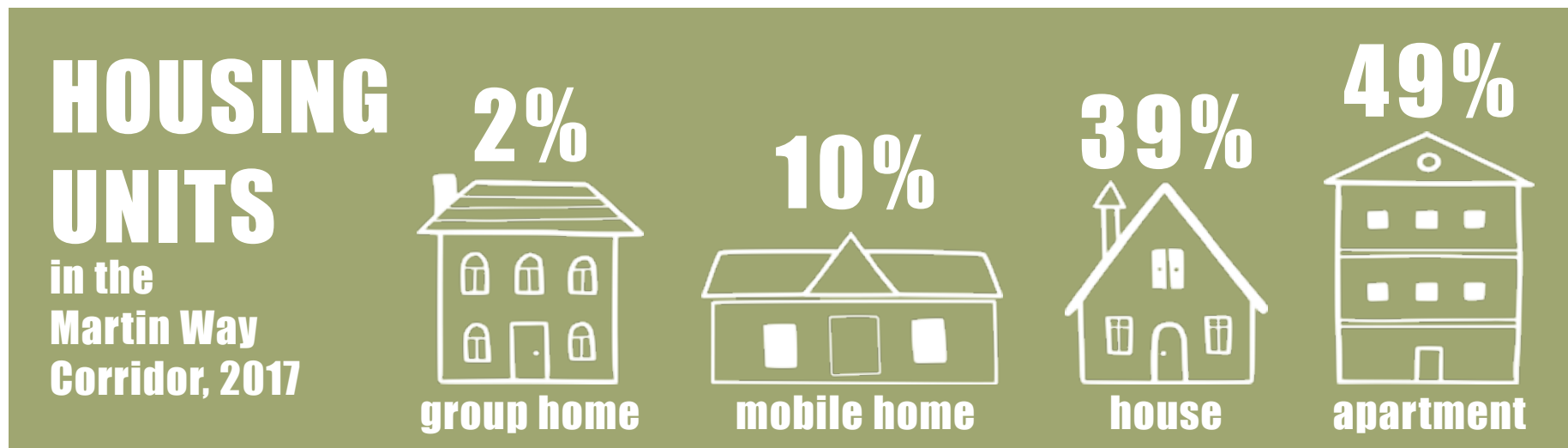


Table 7. 2017 Population of the Martin Way Corridor, by Housing Type and Section. *Source: Thurston Regional Planning Council Population and Employment Forecast, 2018.*

Population, 2017	Pacific- Lilly	Lilly-College	College-Carpenter	Carpenter-Marvin	TOTAL, Martin Way Focus Area	Marvin-Meridian	TOTAL, Martin Way Corridor
Single-family	872	185	79	1,314	2,450	1,133	3,583
Multifamily	434	747	165	1,145	2,492	1,964	4,456
Manufactured homes	168	236	0	257	660	144	804
Group quarters	180	3	0	16	199	1	200
TOTAL	1,654	1,170	244	2,732	5,801	3,242	9,043

Table 8. 2045 Population of the Martin Way Corridor, by Housing Type and Section. *Source: Thurston Regional Planning Council Population and Employment Forecast, 2018*

Population, 2045	Pacific- Lilly	Lilly-College	College-Carpenter	Carpenter-Marvin	TOTAL, Martin Way Focus Area	Marvin-Meridian	TOTAL, Martin Way Corridor
Single-family	900	216	72	1,364	2,551	1,201	3,752
Multifamily	1,395	1,688	214	2,680	5,977	2,830	8,807
Manufactured homes	165	214	0	239	618	135	753
Group quarters	371	4	0	20	395	1	397
TOTAL	2,831	2,122	287	4,302	9,541	4,167	13,708

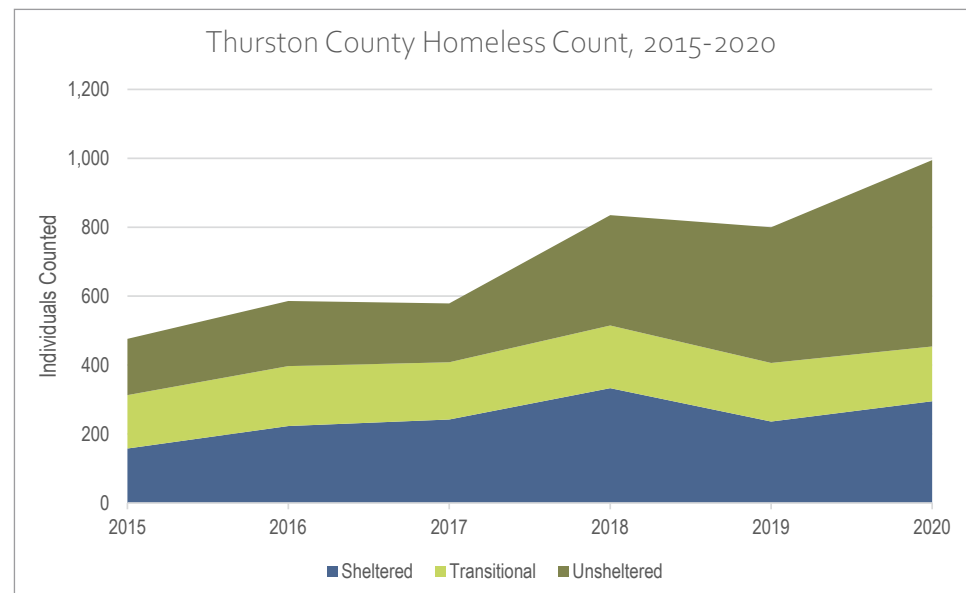
Chapter 3 Corridor Characteristics

those included in previous sections of this chapter often are missing information from these residents. The unhoused population includes those who live in shelters or transitional housing, like the Drexel House operated by Catholic Community Services on Devoe Street, as well as those who live “unsheltered” in places not intended for habitation, such as cars, tents, abandoned buildings, vacant land or public rights-of-way next to streets and freeway on-ramps. One of the region’s largest homeless encampments, known as “The Jungle,” is located in a wooded area within the Pacific Avenue to Lilly Road section, but other smaller encampments exist throughout the corridor.

While there is no geographically specific data to estimate the unhoused population within the corridor, anecdotally, the area has seen an increase in recent years, particularly among the unsheltered community. This is consistent with results of the annual Thurston County Point in Time Homeless Count, which has counted an increasing number of homeless individuals countywide, and an increasing share of unsheltered individuals. Several new shelters and transitional housing developments are under construction or consideration in the corridor, most of these concentrated in the Pacific Avenue to Lilly Road section.

Unhoused residents often rely on alternative transportation modes to get where they need to go, so access to transit, as well as pedestrian and bicycle infrastructure helps connect these communities to essential services and opportunities. Parking regulations and availability can impact residents who live in vehicles, including in larger trailers or recreational vehicles. Opportunities for innovative, affordable housing, as well as access to accessible public spaces or other “third places” (neither residential nor commercial) where people can gather are among the key needs for this population.

Figure 17. Thurston County Point in Time Homeless Count, 2015-2020. *Source: Thurston County Public Health and Social Services, 2020.*



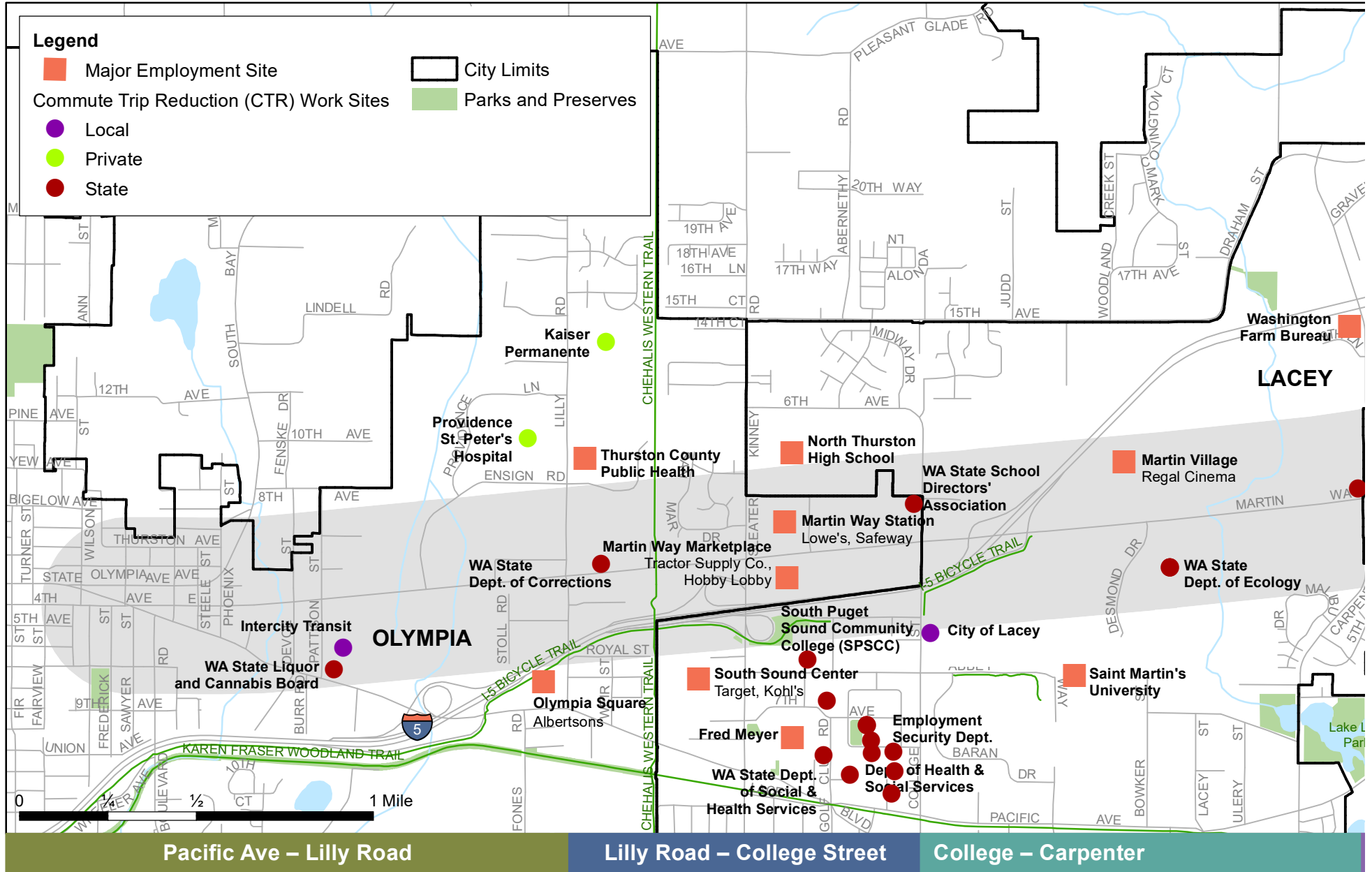
3.3 Workers and Employers

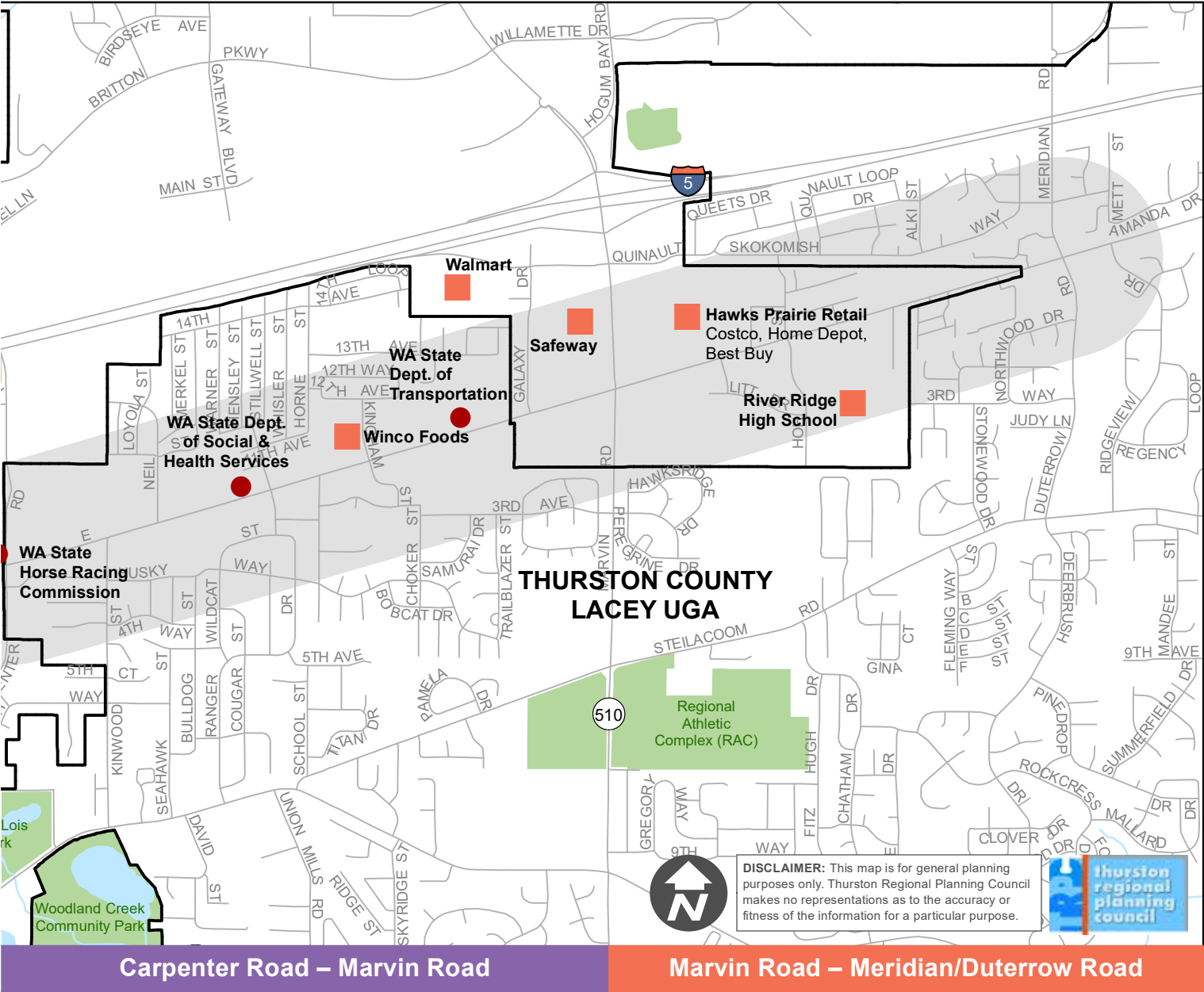
More than 13,000 people work at locations in the Martin Way Corridor, including major employment centers shown in Map 3. This means more people work in the corridor than live there.

The corridor includes more than 1,000 businesses serving a wide range of industries, including health and medical services, big box retail, small businesses, restaurants and other food services, professional offices, hotels, schools, and government agencies. The vast majority are small businesses: three-fourths of all businesses along the corridor have 10 or fewer employees, and 51 percent have four or fewer employees. Retail makes up the largest sector, accounting for 17 percent of all businesses, with the highest concentration of retail between Carpenter and Marvin Road. Health care and social services is the second largest sector (15 percent); these businesses are highly concentrated near Lilly Road.

Chapter 3 Corridor Characteristics

Map 3. Employment centers of the Martin Way Corridor.





Chapter 3 Corridor Characteristics

The westernmost section of the corridor, Pacific Avenue to Lilly Road, has the greatest concentration of jobs currently, and is likely to see the greatest of number of new positions over the coming decades, while the section from Lilly Road to College Street has the greatest number of businesses and is anticipated to see the greatest rate of job growth. In both sections, employment trends are strongly correlated to the continued growth of the health services industry, one of the Thurston

County region's strongest employment sectors. Projected job growth is otherwise distributed evenly across the corridor—as a whole, the corridor is anticipated to gain nearly 6,000 new jobs over the next twenty-five years, an increase of 43 percent over current conditions. This outcome is heavily dependent, however, on the future of employment in the retail and services sectors.

Figure 18. Total and Projected Employment by Section, Martin Way Corridor, 2017-2045. *Source: Thurston Regional Planning Council, Population and Employment Forecast (2018 Update).*

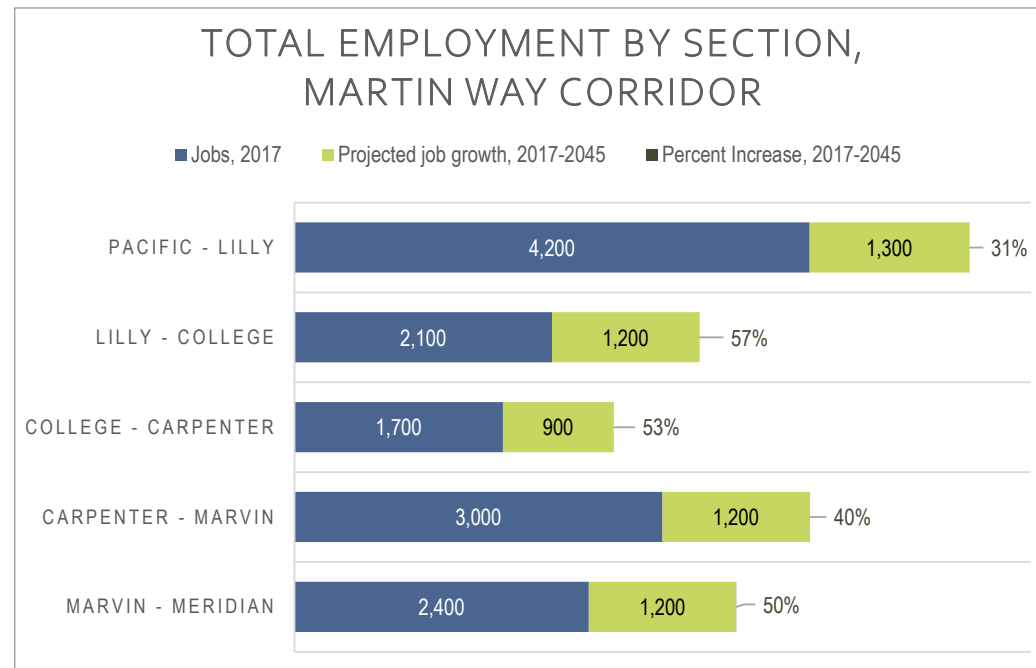


Table 9. Census of Businesses in the Martin Way Corridor. *Source: Thurston Economic Development Council, using the North American Industry Classification System (NAICS), 2020.*

Industry	Pacific - Lilly	Lilly-College	College-Carpenter	Carpenter-Marvin	TOTAL Martin Way Focus Area	Marvin-Meridian	TOTAL Martin Way Corridor
Retail Trade	21	57	9	69	156	22	178
Health Care & Social Assistance	25	85	1	22	133	20	153
Other Services (Except Public Administration)	34	33	3	61	131	17	148
Accommodation & Food Services	8	40	9	43	100	24	124
Professional, Scientific, & Technical Services	9	39	1	12	61	14	75
Finance & Insurance	6	31	3	9	49	16	65
Real estate & Rental	10	17	2	10	39	18	57
Construction	6	13	4	10	33	10	43
Public Administration	9	8	10	5	32	0	32
Administrative & Support Services	4	11	1	10	26	5	31
Educational Services	3	9	2	11	25	4	29
Wholesale Trade	4	9	1	9	23	2	25
Manufacturing	3	7	0	10	20	0	20
Information	1	6	3	8	18	2	20
Arts, Entertainment, & Recreation	1	5	0	4	10	2	12
Transportation & Warehouses	2	2	0	1	5	2	7
Agriculture, Forestry, Fisheries	0	0	1	0	1	0	1
Mining, Quarrying	0	1	0	0	1	0	1
Utilities	1	0	0	0	1	0	1
All Industries	147	373	50	294	864	158	1,022



Land Use

This chapter looks at environmental conditions, current land use and development patterns, and land use regulations in the Martin Way Corridor. These factors have shaped how Martin Way looks today and will help determine how it could look in the future.

4.1 Current Land Use

Watersheds, Streams, and Wetlands

The Martin Way Corridor is part of a dynamic ecosystem connected to other parts of the Thurston County and Puget Sound region, though some of its environmental features are largely hidden beneath current development. Along its length, Martin Way crosses three important stream systems, or watersheds, and cuts through extensive wetlands and other habitat, as shown in Map 4.

- **Indian Creek:** Indian Creek flows south from its headwaters in Bigelow Lake, just north of the corridor, and is piped under Martin Way near Devoe Street and I-5, eventually flowing to the East Bay of Budd

Inlet. The creek has poor water quality, including high rates of bacteria and nutrients, and intense urban development in the area that drains to this stream has degraded many of its natural functions. In spite of these conditions, the creek supports resident fish and other aquatic species, including Cutthroat Trout.

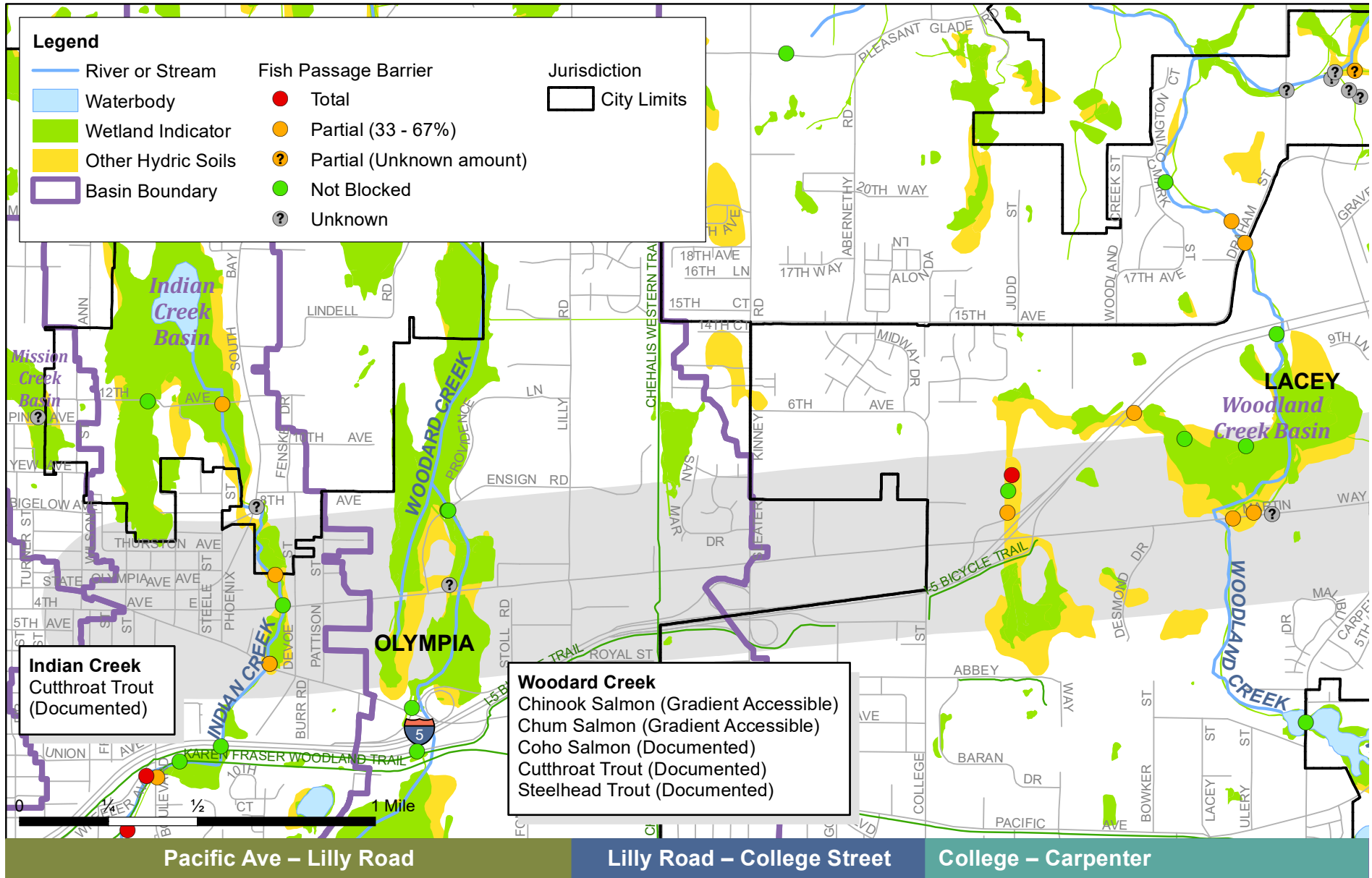
- **Woodard Creek:** Woodard Creek originates in a large wetland complex that extends south of Martin Way to Fones Road. The stream crosses under Martin Way near the intersection of Ensign Road and flows north to Henderson Inlet. Although impacted from heavy development around its headwaters, Woodard Creek has relatively good water quality and has documented use by Coho Salmon, Cutthroat and Steelhead Trout.

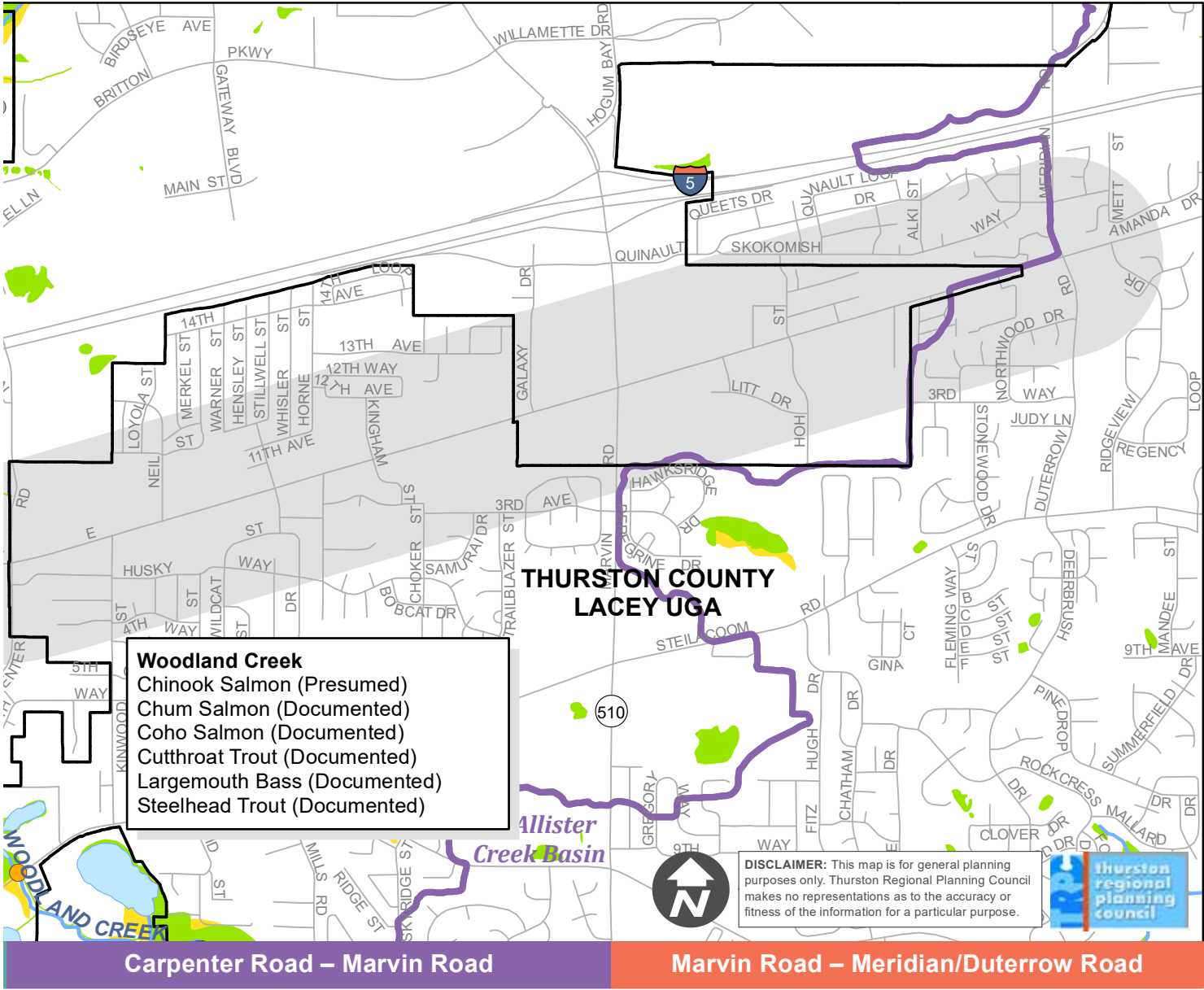
Poor water quality in Woodard Creek can contribute to the closure of shellfish beds in the Henderson Inlet Shellfish Protection District.

- **Woodland Creek:** Woodland Creek flows north from a series of interconnected lakes at the boundary of the City of Lacey and Lacey UGA (Hicks, Pattison, Long, and Lois). From Lake Lois to Martin Way, the creek is a low flowing stream that often dries up in the summer; downstream of Martin Way, flow increases as the stream is fed by several natural springs. Woodland Creek has documented use by several fish species, including Chum and Coho salmon and Cutthroat and Steelhead Trout. The Woodland Creek basin is

impacted by the concentrated level of development and high percentage of impervious surfaces in the areas that drain to the stream. Woodland Creek is the largest waterbody draining to Henderson Inlet, and its poor water quality can contribute to the closure of shellfish beds downstream. While water quality has improved significantly in Woodland Creek over the past 20 years, as of 2019 it still among the most polluted of all freshwater streams monitored by Thurston County, with high levels of bacteria and nutrients.

Map 4. Watersheds, streams and wetlands in the Martin Way Corridor.





Chapter 4 Land Use

Environmental conditions influence the type of land use that has developed along Martin Way, and in turn these resources are impacted by activity within the corridor. For example, the concentration of wetlands around Ensign Road and in the section of the corridor from College Street to Carpenter Road limits the potential for future development in these locations. Looking ahead, these environmental features can also be treated as assets and amenities, emphasizing design choices that provide users and residents of Martin Way with opportunities to access and interact with their natural surroundings.

Stormwater runoff from Martin Way and other roads, parking lots, and hard surfaces in the corridor carries trace pollutants into sensitive waterways, impacting water quality. Older development within the corridor was constructed without the water quality and habitat protections that are in place today. Since the early 2000s, Thurston County and the City of Lacey, with support from the state Department of Ecology and other funding sources, have made significant investments in the two Henderson Inlet watershed basins to improve stormwater treatment, connect homes served by leaking septic systems to municipal sewer systems, and restore habitat. Although water quality has improved in these streams, all still have significant water quality issues that bear consideration when looking at development options for the Martin Way Corridor.

Figure 19. Woodland Creek is one of three streams that Martin Way crosses. It has documented use by several fish species.



Land Cover

As it crosses these watersheds, Martin Way alternates between areas that are highly urbanized, lightly developed, and thickly forested and undeveloped. Looking at land cover classes (Table 10), nearly three quarters of the corridor is considered developed (72 percent), but much of this is at a medium or low intensity. Twenty percent of the corridor remains in a more

Table 10. Land Cover in the Martin Way Corridor. *Source:* NOAA C-CAP, *Classification Definitions:* <https://coast.noaa.gov/data/digitalcoast/pdf/ccap-class-scheme-regional.pdf>

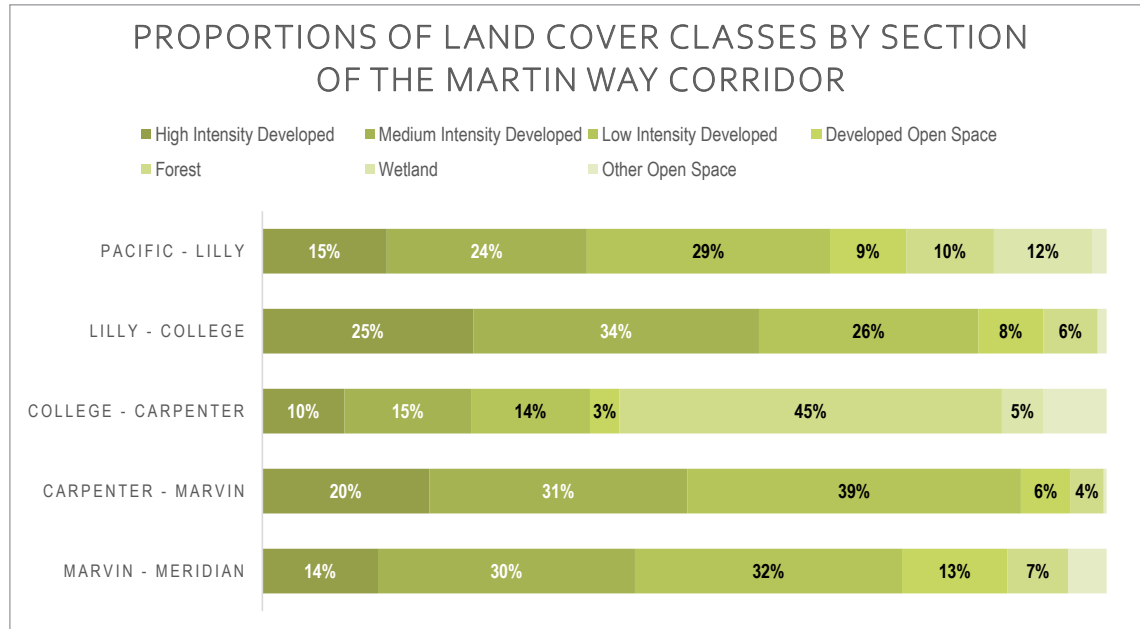
Land Cover Class	Percent Cover
Developed	80%
High Intensity Developed	16%
Medium Intensity Developed	27%
Low Intensity Developed	29%
Developed Open Space (i.e., landscaped parking lots)	8%
Forest	14%
Deciduous Forest	2%
Evergreen Forest	8%
Mixed Forest	4%
Wetland	3%
Other Open Space (Pasture, grassland, cultivated, scrub/shrub, bare land)	3%

natural condition—either as forest, wetland, or other open space. Land cover varies along the length of the corridor: the sections between Lilly and College Streets and Carpenter to Marvin Roads are the most highly developed, while the stretch from College Street to Carpenter Road remains heavily forested (Figure 21).

Figure 20. Much of the Martin Way Corridor is developed at relatively low intensities, such as this property in the Carpenter to Marvin segment, which has a small, single-story building and a large open area dedicated to parking.



Figure 21. Land Cover in the Martin Way Corridor, by Section.
 Source: NOAA C-CAP, Classification Definitions: <https://coast.noaa.gov/data/digitalcoast/pdf/ccap-class-scheme-regional.pdf>.



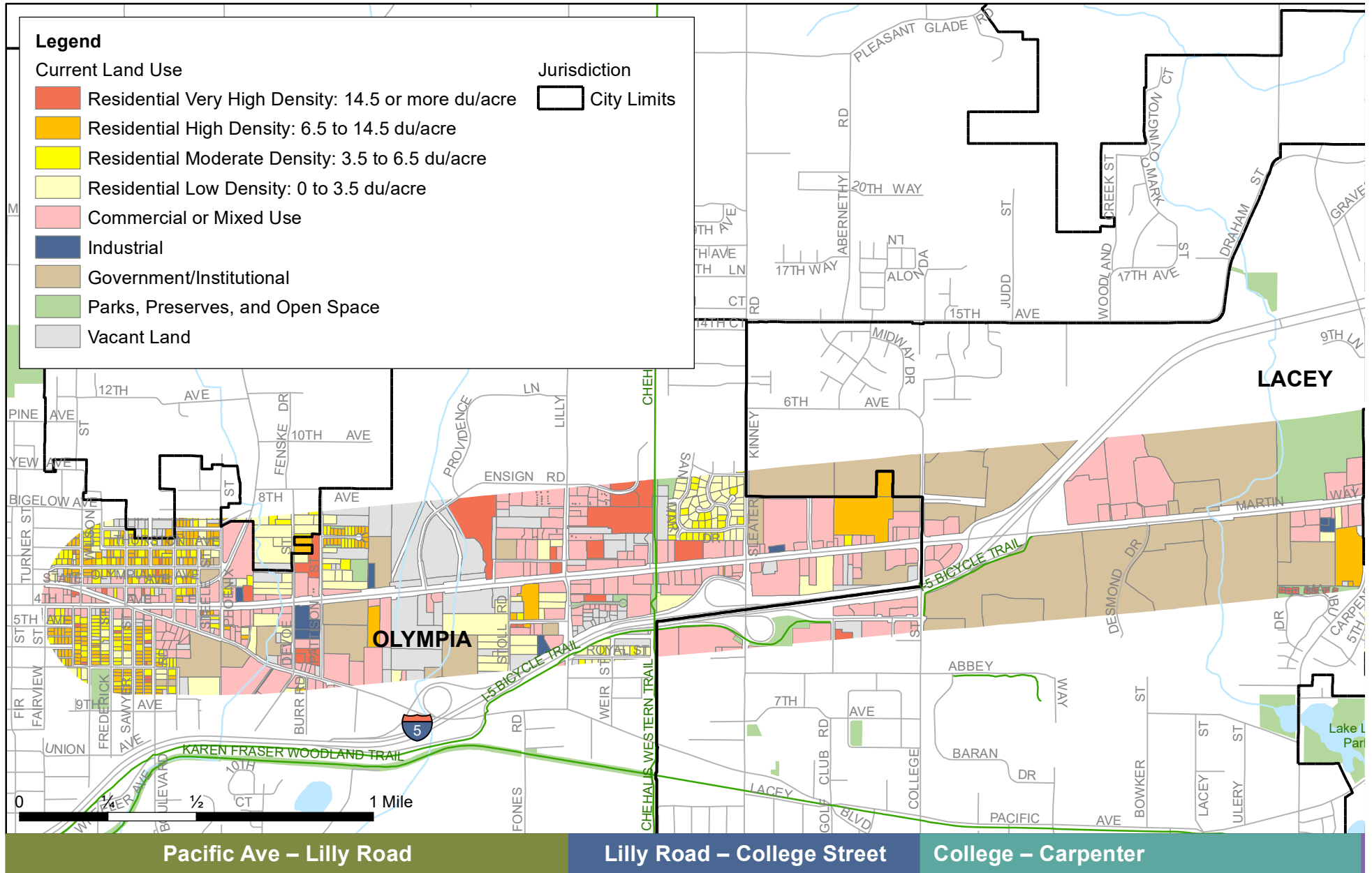
Current Land Use and Ownership

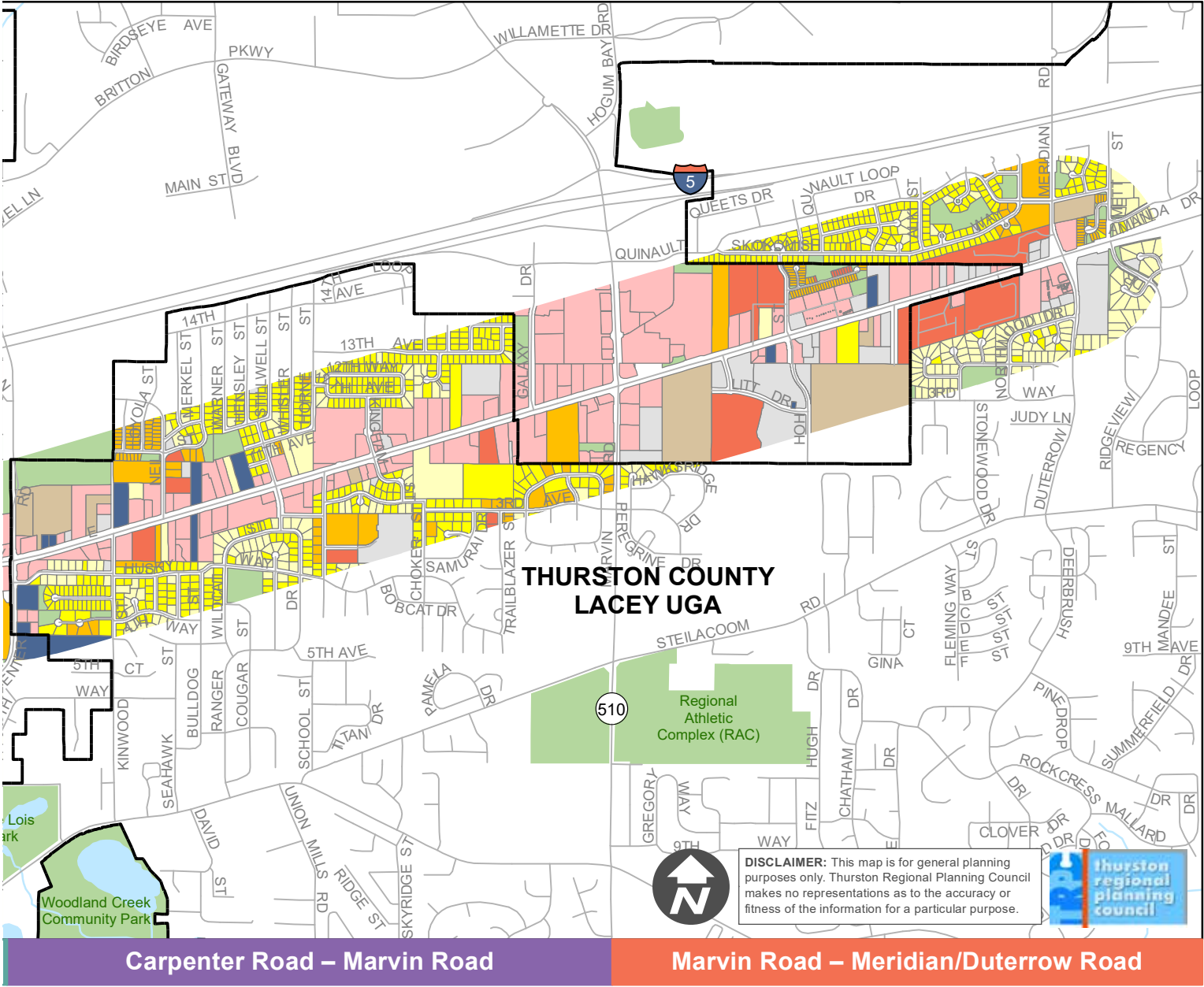
Land uses in the corridor are diverse, with a wide variety of large and small commercial businesses directly on Martin Way, and low- to moderate-density neighborhoods nestled just a parcel back from the street (Map 5). Most of the light manufacturing that populated the corridor historically has moved out, leaving just a handful of remaining parcels with industrial uses. Despite the large concentration of natural areas in the corridor, there are currently few designated parks, and most of these are open space parcels within neighborhoods rather than facilities available for broad public use. There are several clusters of government and institutional uses along the corridor, however the vast majority of land in the corridor is in private ownership (Map 6), including large undeveloped parcels owned by the Sisters of Providence (Ensign Road) and Saint Placid Priory (north of Martin Way, east of College Street), and Saint Martin's Abbey (College Street to Carpenter Road, east of the I-5 access).

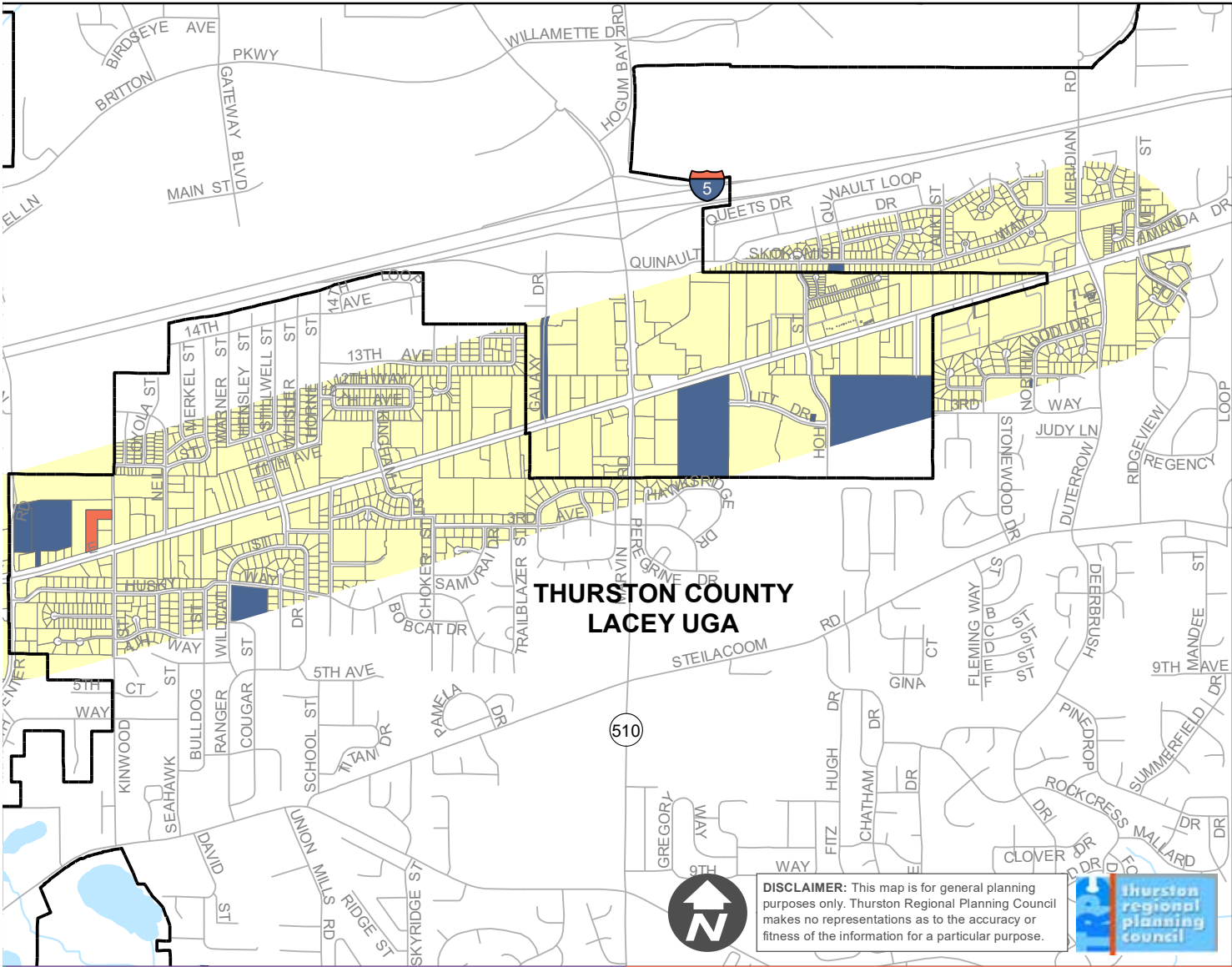


Chapter 4 Land Use

Map 5. Current Land Use, Martin Way Corridor.







Carpenter Road – Marvin Road

Marvin Road – Meridian/Duterrow Road

4.2 Land Use Regulations

As noted in Chapter 2, the comprehensive plans of Olympia, Lacey, and Thurston County all include a vision for vibrant, dense urban development on Martin Way. Each jurisdiction has zoning and development regulations intended to achieve that vision.

Zoning

Current zoning in the corridor largely corresponds with existing use, as shown in Map 7, with mixed use and commercial zoning directly on Martin Way, low- and mid-density residential zones around the edges, and limited areas identified for open space and industrial use.

Nearly half the corridor is zoned to allow a mix of uses, such as a combination of residential, office, retail, manufacturing, or entertainment (46 percent). Both

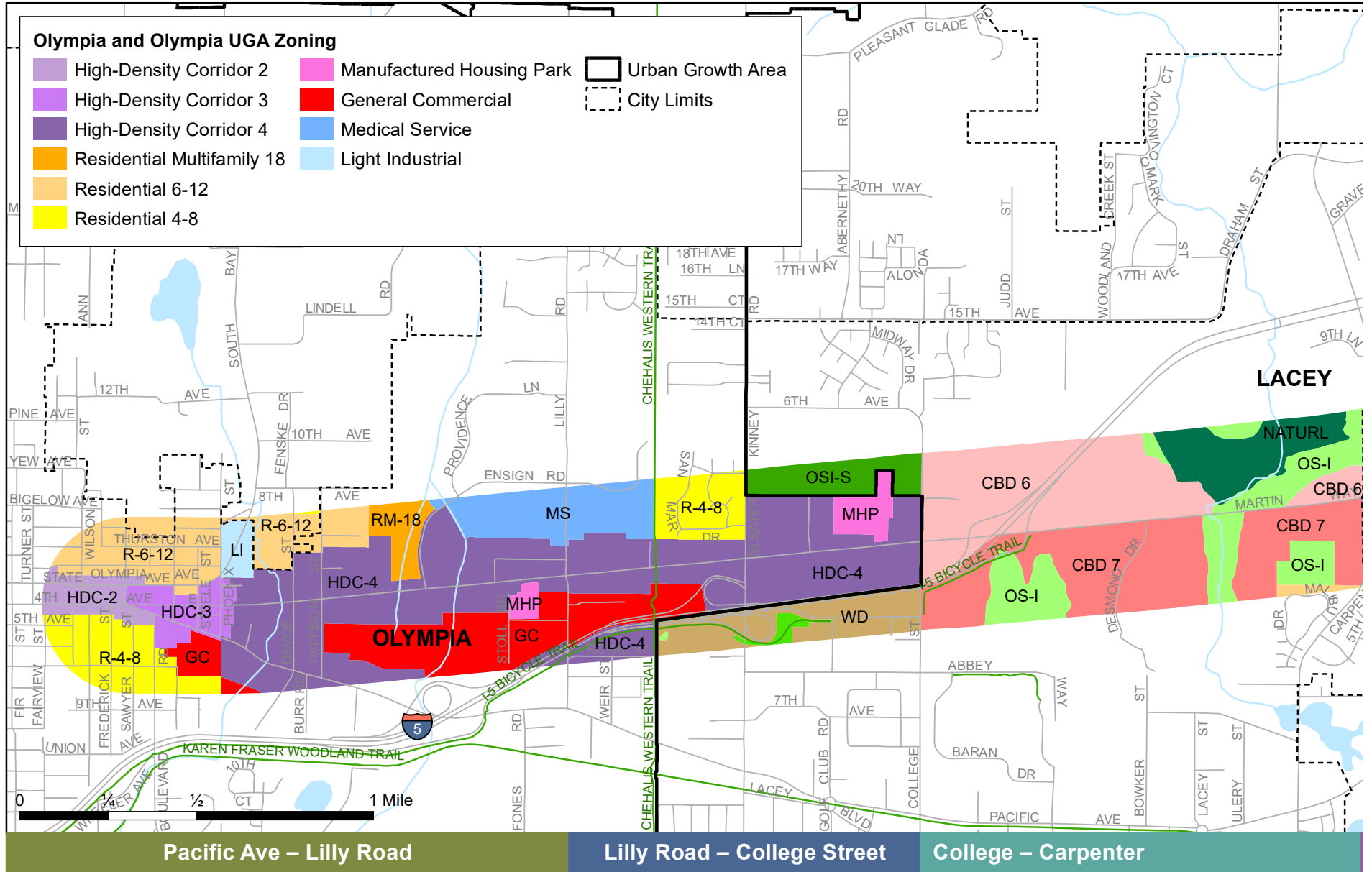
Olympia and Lacey have specific high-density zoning designations that correspond to their visions for these sections of the corridor. The standards for these zoning districts are summarized in Table 11.

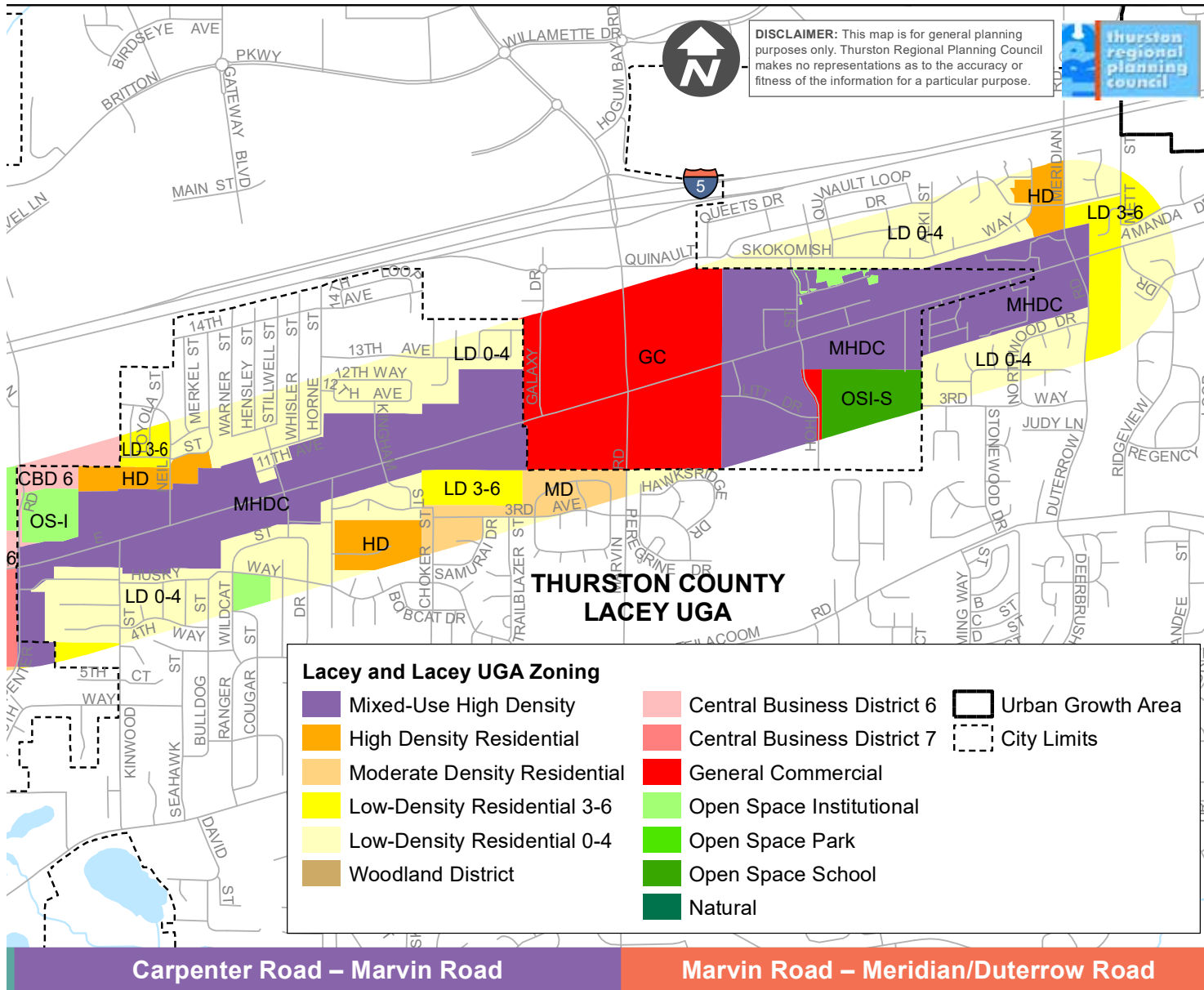
More than a quarter of the corridor is zoned for residential use (29 percent)—notably, the majority of these areas have relatively low densities for an urban setting, less than 10 units per acre. Thurston County’s Low Density Residential o-4 district dominates land just off Martin Way in the Lacey UGA. These neighborhoods remain at low densities in part because they developed without urban utilities, including sewer, and in many cases homes in these areas are still served by individual septic systems, which limit the potential for growth. This pattern can make for a very sudden transition from the high-intensity of Martin Way itself to widely spaced single-family homes.

One area of discrepancy between current use and zoning is the large area within the College Street to Carpenter Road section that Lacey has zoned as Central Business District, although these areas have remained largely undeveloped.

Another potential discrepancy is the area in Olympia west of Ensign Road—though zoned as Residential Multifamily 18 in light of its proximity to an urban corridor and Olympia’s Medical Services district, this area is largely made up of two undeveloped parcels owned by the Sisters of Providence in Washington and has extensive wetlands.

Map 7. Current Zoning, Martin Way Corridor





Development Standards and Incentives

Development standards, such as building heights, parking requirements, and permitted uses, function to regulate the look and feel of Martin Way and help guide the corridor’s growth into the future.

While Olympia, Lacey, and Thurston County all have zoned large portions of the corridor in mixed-use zones with similar intents, the specific standards for these districts have slight differences in maximum building heights, building coverage, permitted uses, stormwater infrastructure, and parking requirements. These differences are minor when viewed individually, but their cumulative effect contributes to the lack of a consistent look or feel to the corridor.

The jurisdictions also take different approaches to integrating pedestrian and transit access and incentivizing types of development. For example, while Olympia applies a multifamily tax exemption to its section of the Martin Way Corridor, Lacey’s applies to the Woodland District, just south of Martin Way, but not the corridor itself. No such tax incentive is available in the portion of the corridor under Thurston County jurisdiction. In the portions of Lacey and the Lacey UGA zoned as Mixed Use High Density Corridor, mixed uses and pedestrian amenities are required to allow higher building and impervious surface coverage.

Table 11. Comparing Mixed-Use Zoning Districts on the Martin Way Corridor

Zoning District	High Density Corridor (HDC 2-4)	Mixed Use High Density Corridor (MHDC)
Jurisdiction	Olympia	Lacey & Lacey UGA
Code	OMC 18.06	LMC 16.23/TCC 21.23
Year Established	1995	1995
Acres in Martin Way Corridor	356 acres (21 acres in HDC-2; 26 acres in HDC-3; 309 acres in HDC-4)	291 acres (87 acres in city; 204 in UGA)

Zoning District	High Density Corridor (HDC 2-4)	Mixed Use High Density Corridor (MHDC)
Intent	<p>HDC-2:</p> <ul style="list-style-type: none"> - Provide for a compatible mix of office, medium intensity commercial and moderate to high-density multifamily residential uses. - Ensure that residential and mixed-use projects are built within walking distance to transit. - Ensure that projects (buildings) are designed, using a neighborhood area design theme in order to blend with the historic buildings in the corridor and the adjacent neighborhoods. <p>HDC-3:</p> <ul style="list-style-type: none"> - Provide for a compatible mix of medium to high-intensity commercial, offices, and moderate to high-density multifamily residential uses. - Ensure that access to transit is a part of all new projects. <p>HDC-4:</p> <ul style="list-style-type: none"> - Provide for a compatible mix of high-intensity commercial, offices, and high-density multifamily residential uses. - Transform these areas to commercial and residential activity centers, over time. - Ensure that access to transit is a part of new projects. <p>All HDC zones:</p> <ul style="list-style-type: none"> - Establish a street edge that is as continuous as possible with buildings which are close to the street and which have multiple floors, distinctive windows facing the street, and entrances that are visible from the street. - Create a safe, convenient, and attractive environment for pedestrians, transit riders, and bicyclists, and which includes parking and access for vehicles. 	<p>Over time... gradually change from an area dominated by strip commercial development, light industry, warehousing, and other low intensity or non-pedestrian uses into mixed use, high density residential and commercial area where people enjoy walking, shopping, working and living.</p> <p>Create three mixed high-density corridor zones ... to reflect an emphasis on existing uses which are already established within the area to help promote a healthy business climate for existing uses.</p> <p>Carpenter-Hensley: a full range of commercial uses with attractive street fronts, multimodal improvements and a design which is compatible in an environment where residential uses and commercial uses are located adjacent to one another.</p> <p>Hensley-Marvin: transition zone; recognize some automobile-related uses but only through a special use permit process.</p> <p>Marvin-Meridian: Low intensity and motor-vehicle-oriented uses are not desirable within this area, including uses that sell products of such size and weight as to require motor transport by necessity, such as boats, and/or require substantial areas for outdoor storage of products or equipment. Exceptions for food and merchandise stores where design serves local pedestrian traffic and is compatible to adjacent uses.</p> <p>All sections:</p> <ul style="list-style-type: none"> - Allow for commercial uses and other mixed-use development in a way that serves the needs of the neighborhood and the community and enhances the appearance and identity of the mixed high-density corridor. - Provide for a type, configuration and density of development that will entice pedestrian shoppers to frequent the area, encourage pedestrian traffic between businesses, facilitate efficient mass transit, and require less reliance on motor vehicles. - Encourage a variety of businesses which offer retail goods or consumer services that appeal to pedestrians and/or serve the needs of the surrounding neighborhood. - Integrate new development with existing uses to achieve a better environment for pedestrians and to maintain or enhance the livability of the adjacent residential neighborhood. - Provide development standards which require direct, convenient pedestrian and vehicular access to businesses. - Balance the needs of motorists and businesses serving a community-wide market with the needs of pedestrians and neighborhood residents.

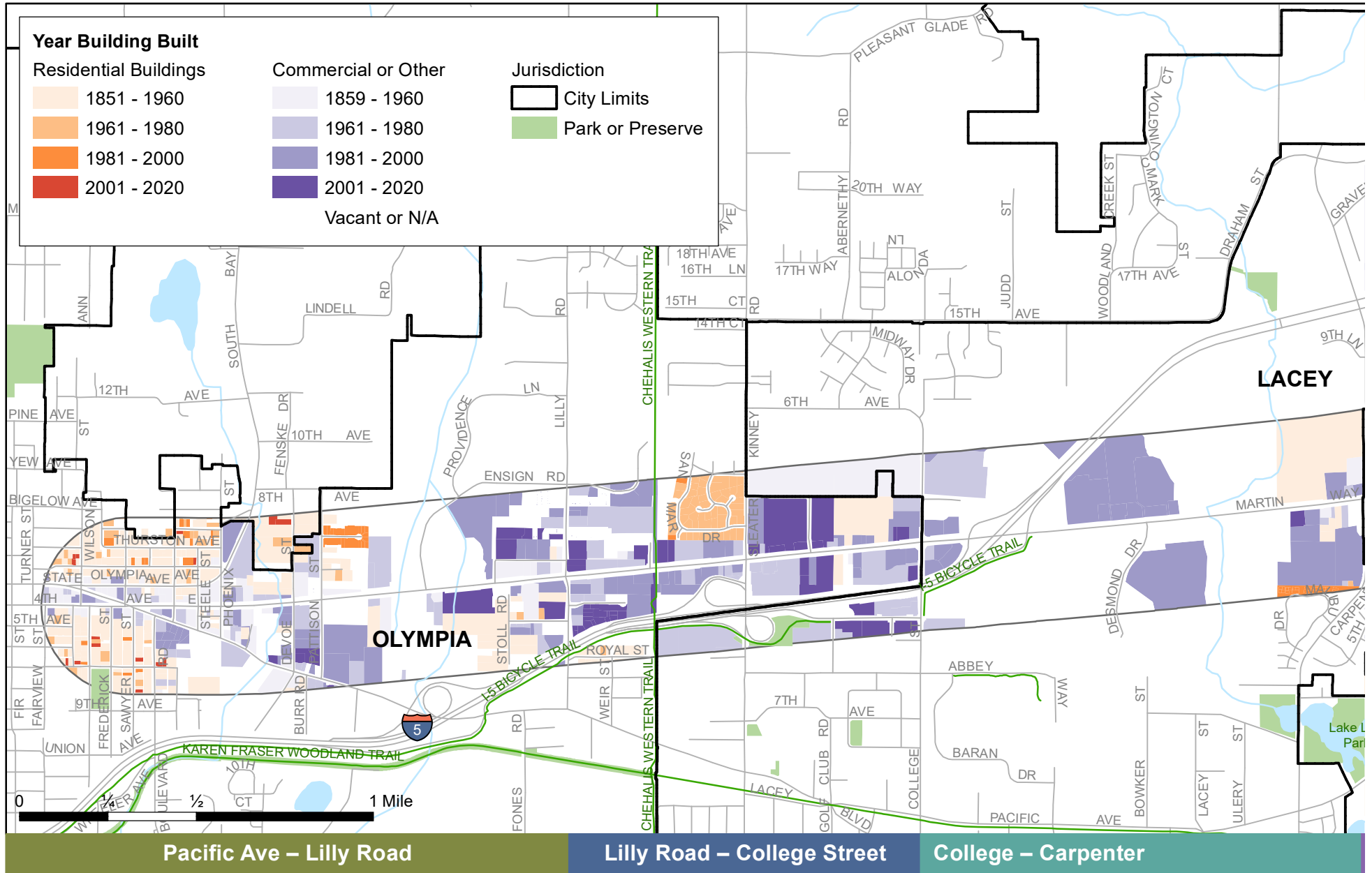
Chapter 4 Land Use

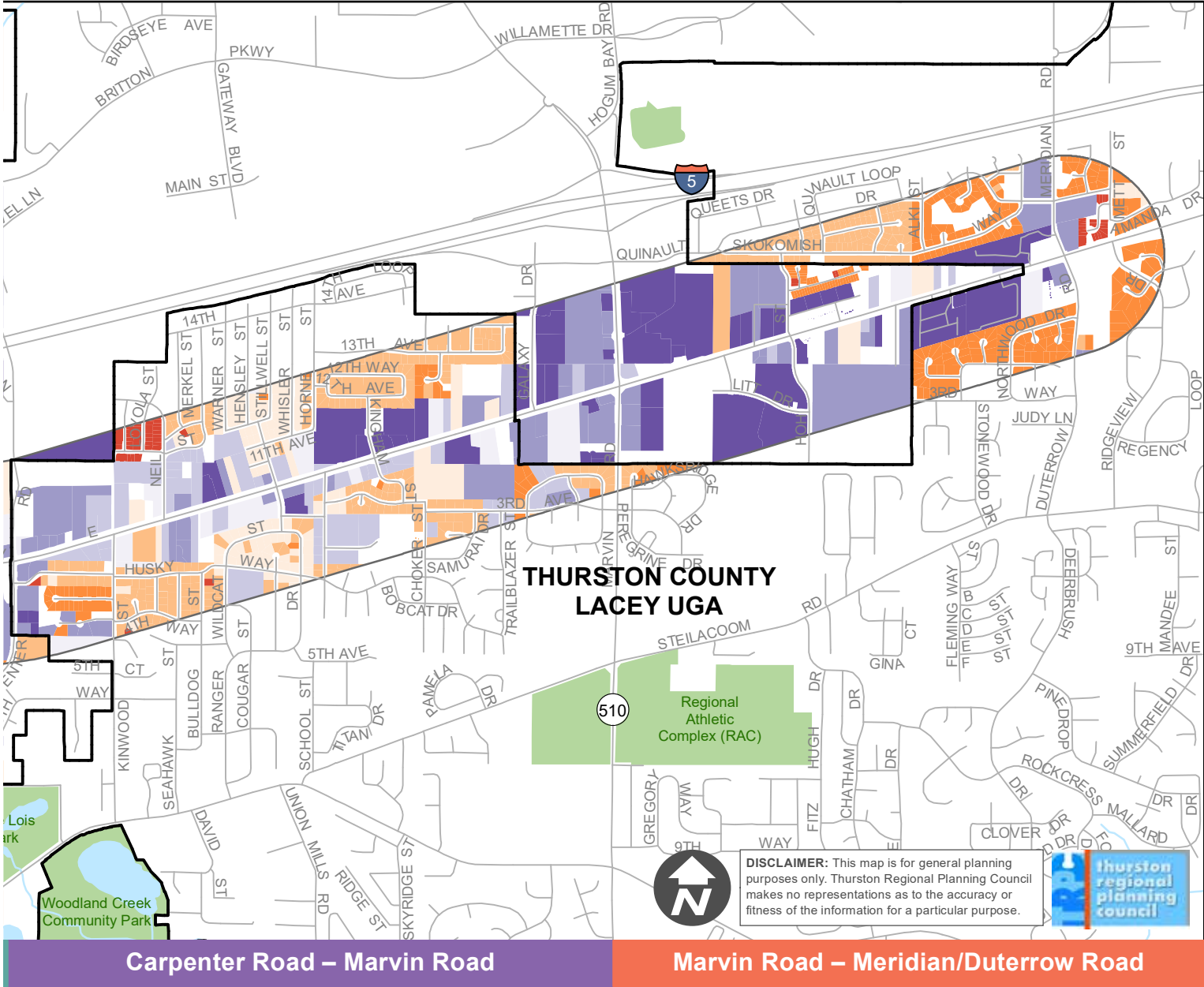
Zoning District	High Density Corridor (HDC 2-4)	Mixed Use High Density Corridor (MHDC)
Density	No minimum or maximum	No minimum or maximum
Front setback	0-10 feet; no minimum	0-15 feet; no minimum
Building Height	35-75 ft 35 ft within 100 ft of low-density residential areas 60 ft for most areas Up to 70 feet in HDC-3 if parking is located under a building Up to 70 feet in HDC-3 if one story is residential	No minimum or maximum, except 45 ft within 100 ft of existing single-family subdivision
Building Coverage	70% Up to 85% in HDC-3 if at least 50% of required parking is located under building	35% Up to 85% if site design incorporates desired elements: mixed uses (+5%), 3-4 stories (+5%), pedestrian areas (+20%), through-block corridor for pedestrian access (+10%), 50% of parking underground or within building (45%)
Impervious Surface/ Development Coverage	85%	60% Up to 95% if site design incorporates desired elements: mixed uses (+5%), pedestrian areas (+30%), through-block corridor for pedestrian access (+15%), vegetated roof (50% of square footage of vegetated roof)

Commercial development in areas zoned as Mixed Use High Density Corridor often includes pedestrian amenities like benches and walkways to allow higher building and impervious surface coverage.



Map 8. Building Age, Martin Way Corridor.





4.3 Development Patterns

Existing development

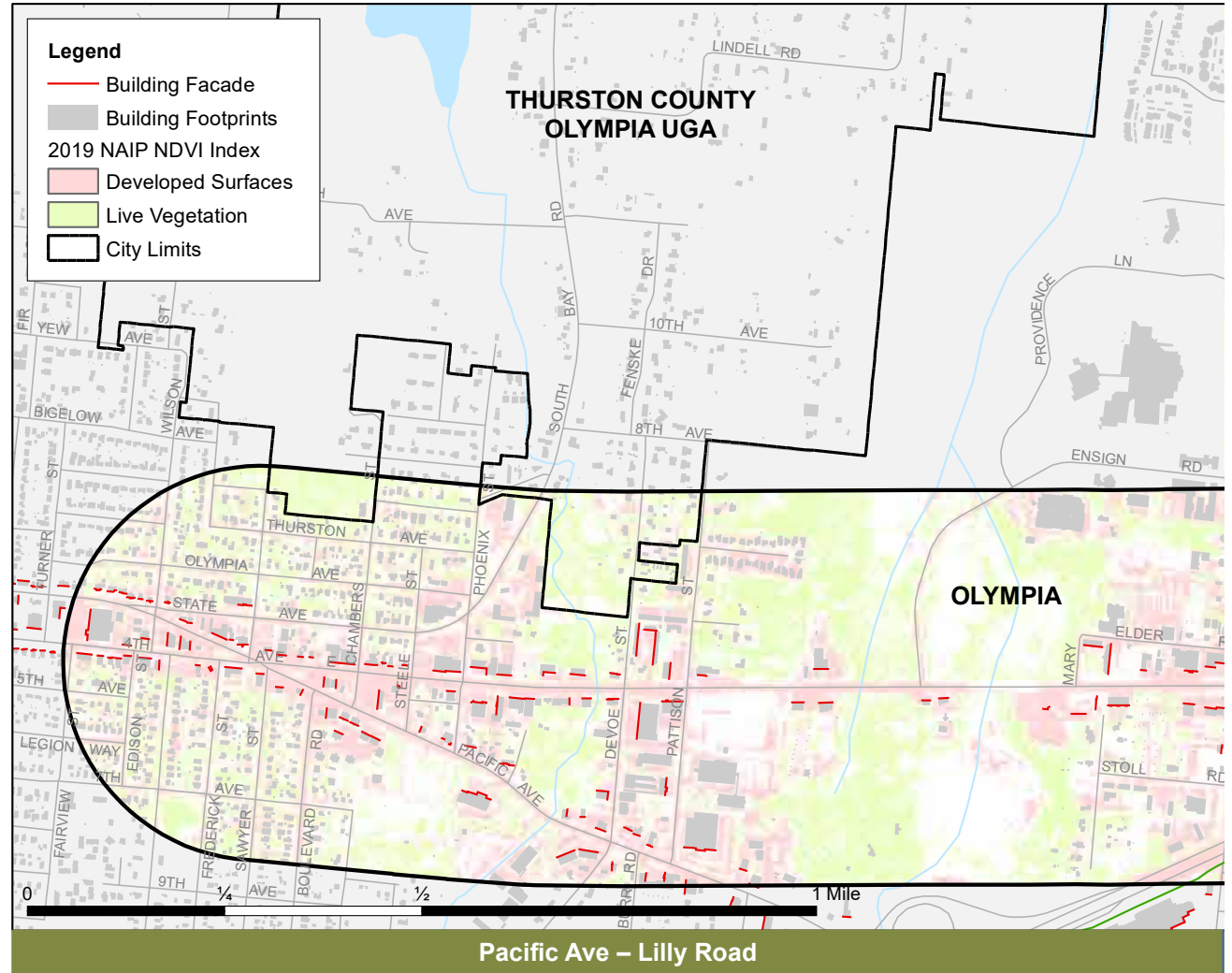
Since Martin Way opened in the 1930s, development along its length has occurred as a patchwork, rather than by coordinated design. In general, development has progressed from west to east (Map 8), with the oldest residential and commercial buildings in Olympia and newest development seen east of Marvin Road in Lacey and its UGA. Today, you can find examples from every past wave of development along the corridor: the motor lodges and trailer parks of the 1940s and 50s, suburban neighborhoods of the 1960s, strip-mall-style retail of the 1970s and 80s, big box retail of the 1990s and 2000s, with a few new examples of the dense, urban, mixed use development called for in today's plans.

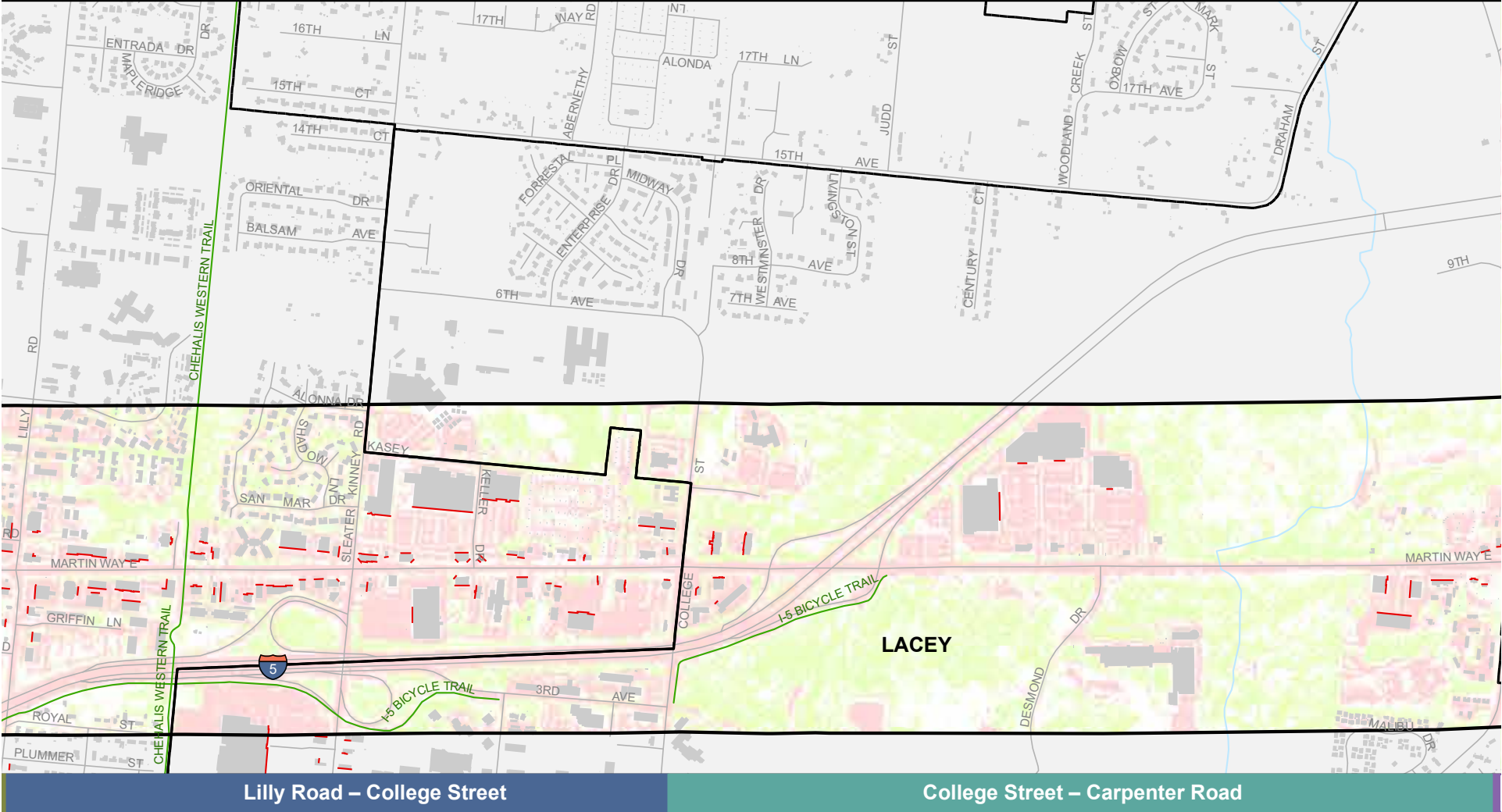
Throughout its history, development on Martin Way has favored access by automobiles. Map 9 gives a sense of how buildings are located within the corridor area. Most commercial locations feature large, open parking areas adjacent to the street, and with businesses set farther back. Very few structures have their facades directly on Martin Way, and many face away from the street. Similarly, neighborhoods constructed along Martin Way were designed with the expectation that residents would typically travel by car, with winding streets, cul de sacs, and garages facing the street. In contrast, Olympia's Northeast and Southeast neighborhoods, seen at the westernmost extent of Map 9, predate the construction of Martin Way and are laid out in a grid form that more easily supports pedestrian travel.

Many developments on Martin Way were built with a focus on access for people arriving in cars, rather than on foot, with large parking lots adjacent to the street, such as the Lacey Urban Center, which was built in the 1960s around the same time as the nearby Tanglewilde and Thompson Place neighborhoods.

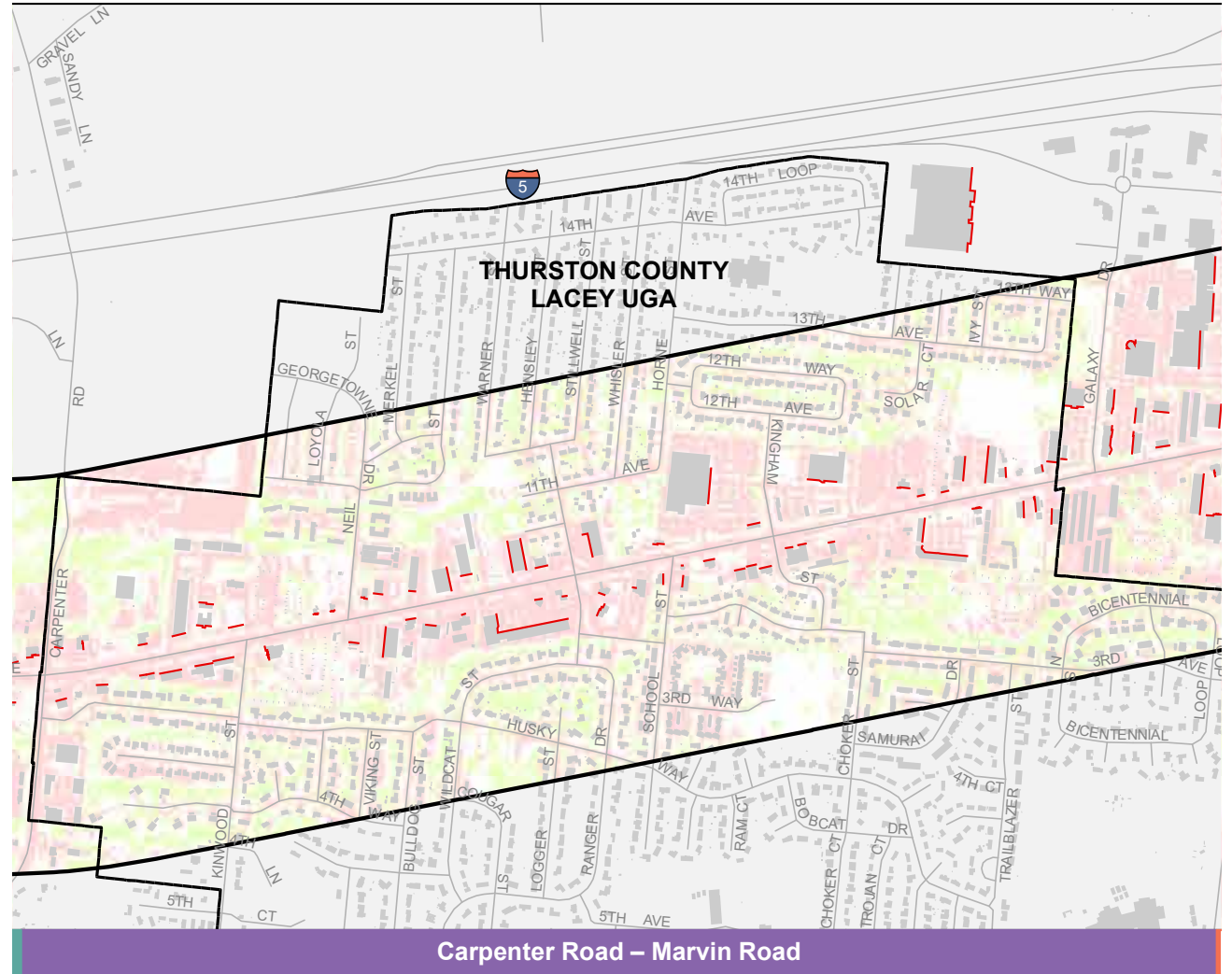


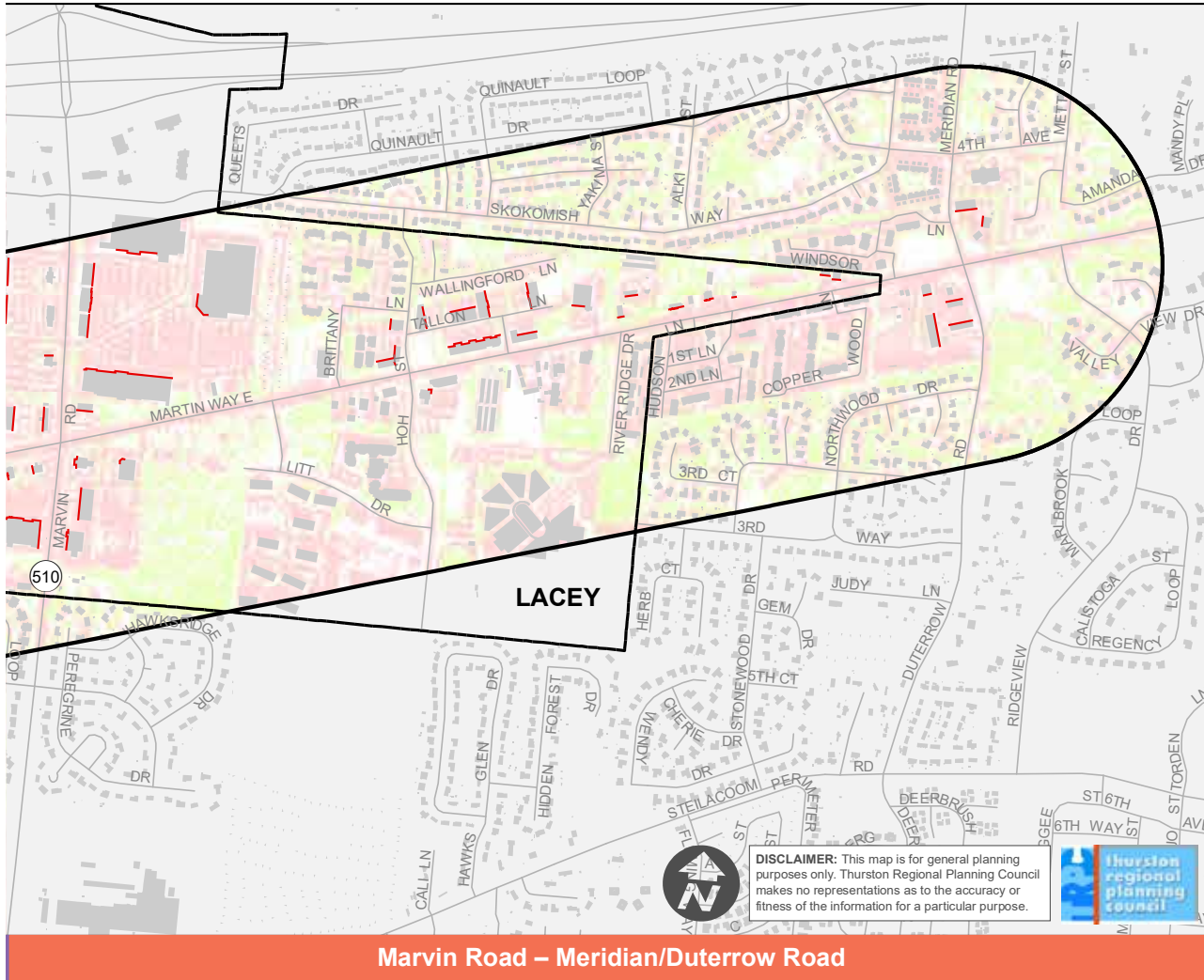
Map 9. Physical Form, Martin Way Corridor.





Map 9. Physical Form, Martin Way Corridor, continued.

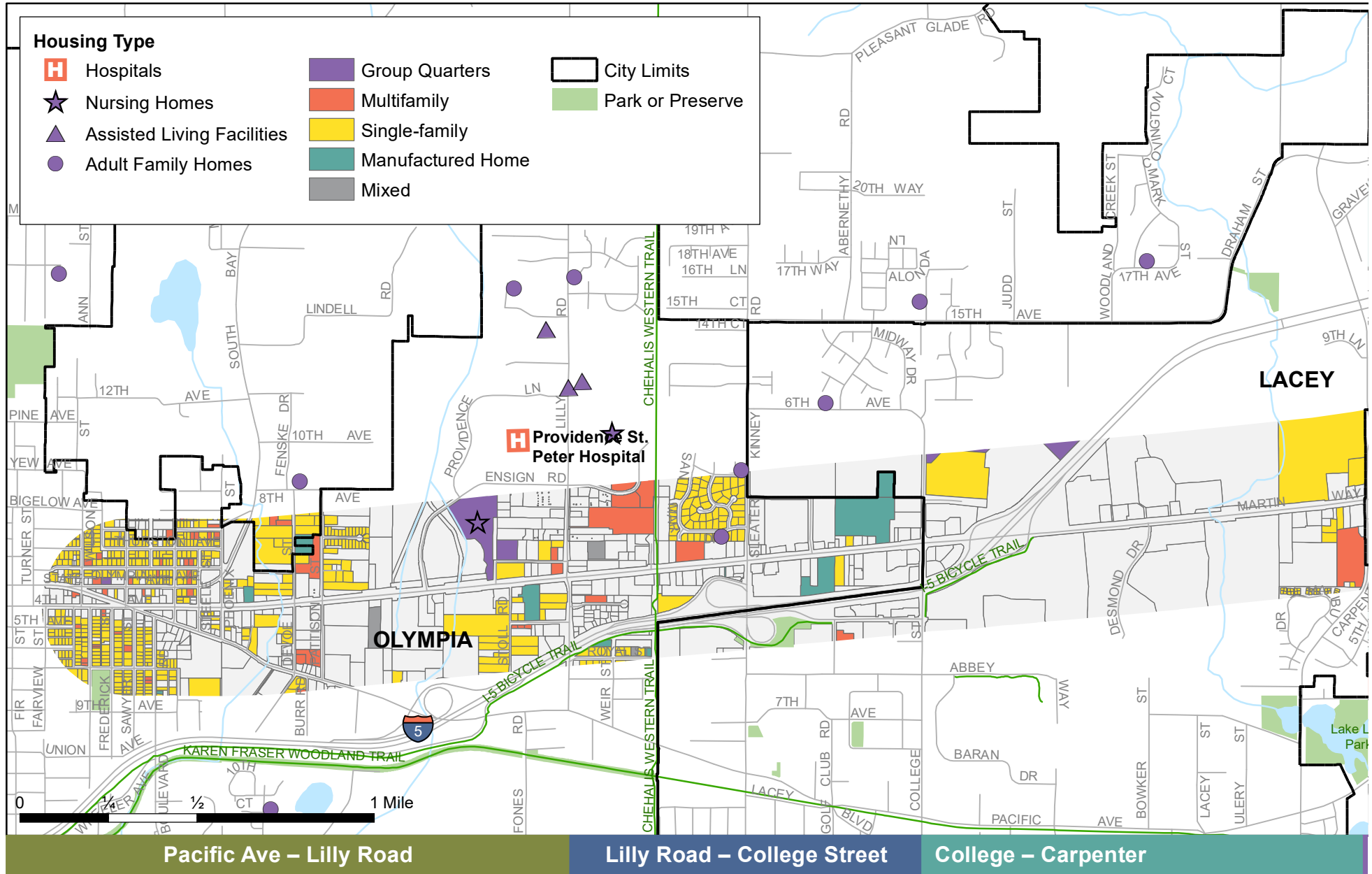


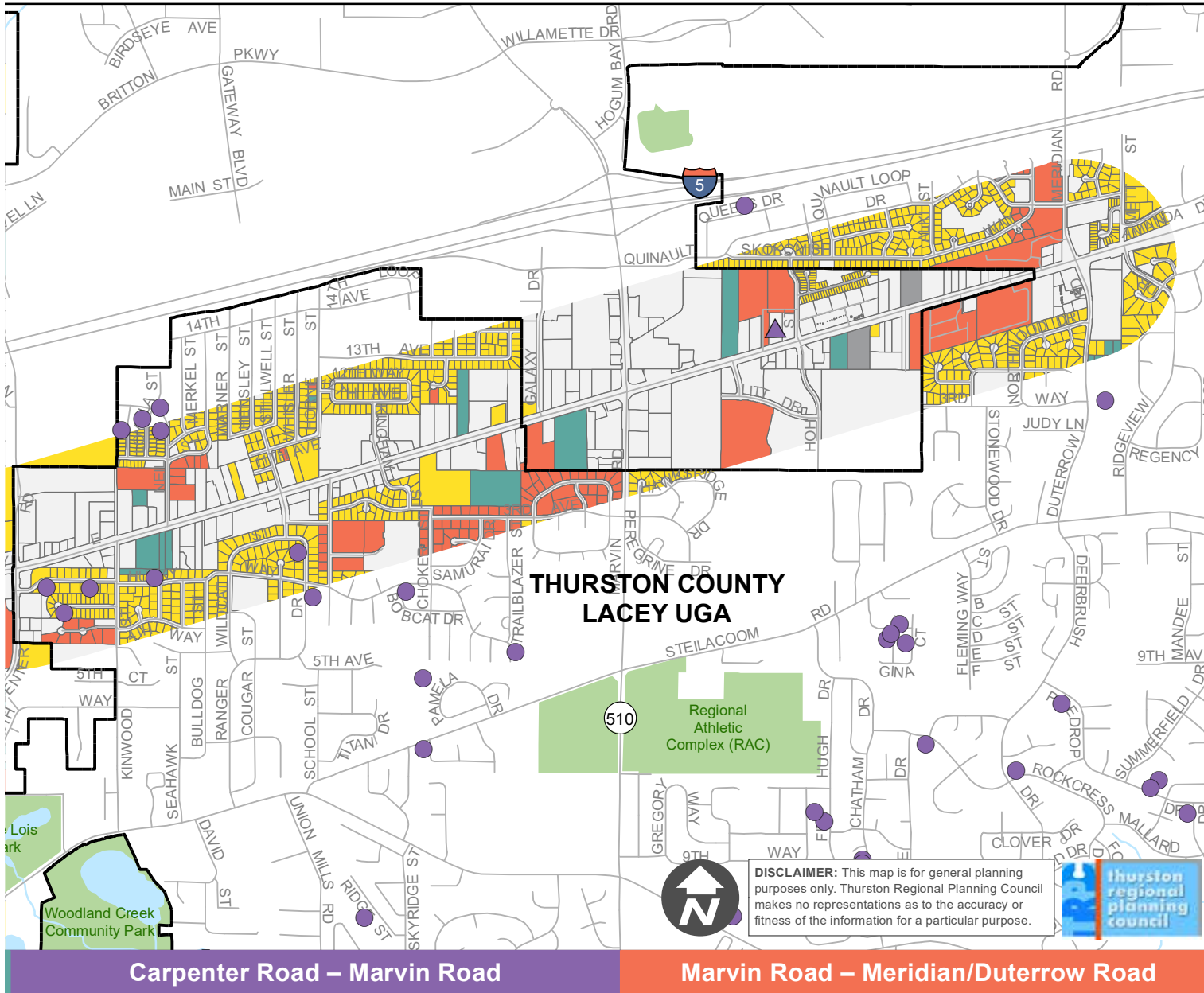


Marvin Road – Meridian/Duterrow Road

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Map 10. Housing Types, Martin Way Corridor.

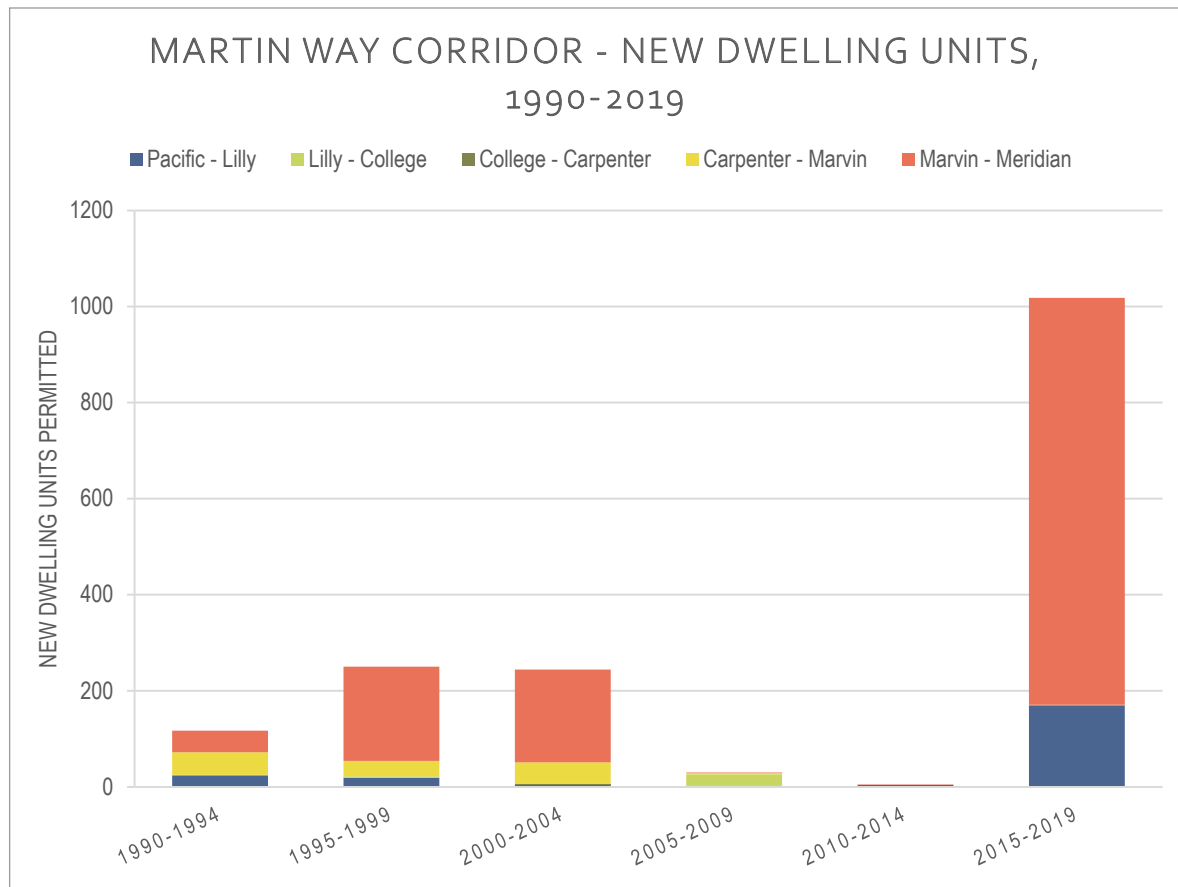




As shown in Map 10, the corridor includes a diverse selection of housing options, including traditional single-family neighborhoods, apartment complexes, manufactured home parks, and group quarters (including assisted living facilities). The majority of corridor residents (58 percent) live in multifamily developments. About a third (32 percent) live in single-family units today and one in ten live in a manufactured home. Most housing in the corridor predates 1990, and until recently, there were few new units being constructed. Since 2016, new housing has sprung up, although most has been concentrated in the easternmost section of the corridor, between Marvin and Meridian Roads (Figure 22).

Despite the emphasis on creating mixed-use development stated in the Comprehensive Plans and development standards of both Olympia and Lacey, there has been very little mixed-use development along the corridor since the mid-1990s, and no development that combines commercial and residential uses in a single structure.

Figure 22. Martin Way Corridor, Dwelling Units Constructed Over Time, 1990-2019.



Examples of Residential Development on Martin Way



Older apartment building.



Older single-family neighborhood.



Mobile home park.



New mixed-use professional offices and apartments.



New affordable apartments.



New market-rate apartments under construction.

Examples of Commercial and Other Development on Martin Way



Small strip-type retail development, built in 1977.



Big-box retail development, built in 2002.



New hotel development, built in 2016.



Older industrial use, built in 1963.



New commercial development, built in 2013.

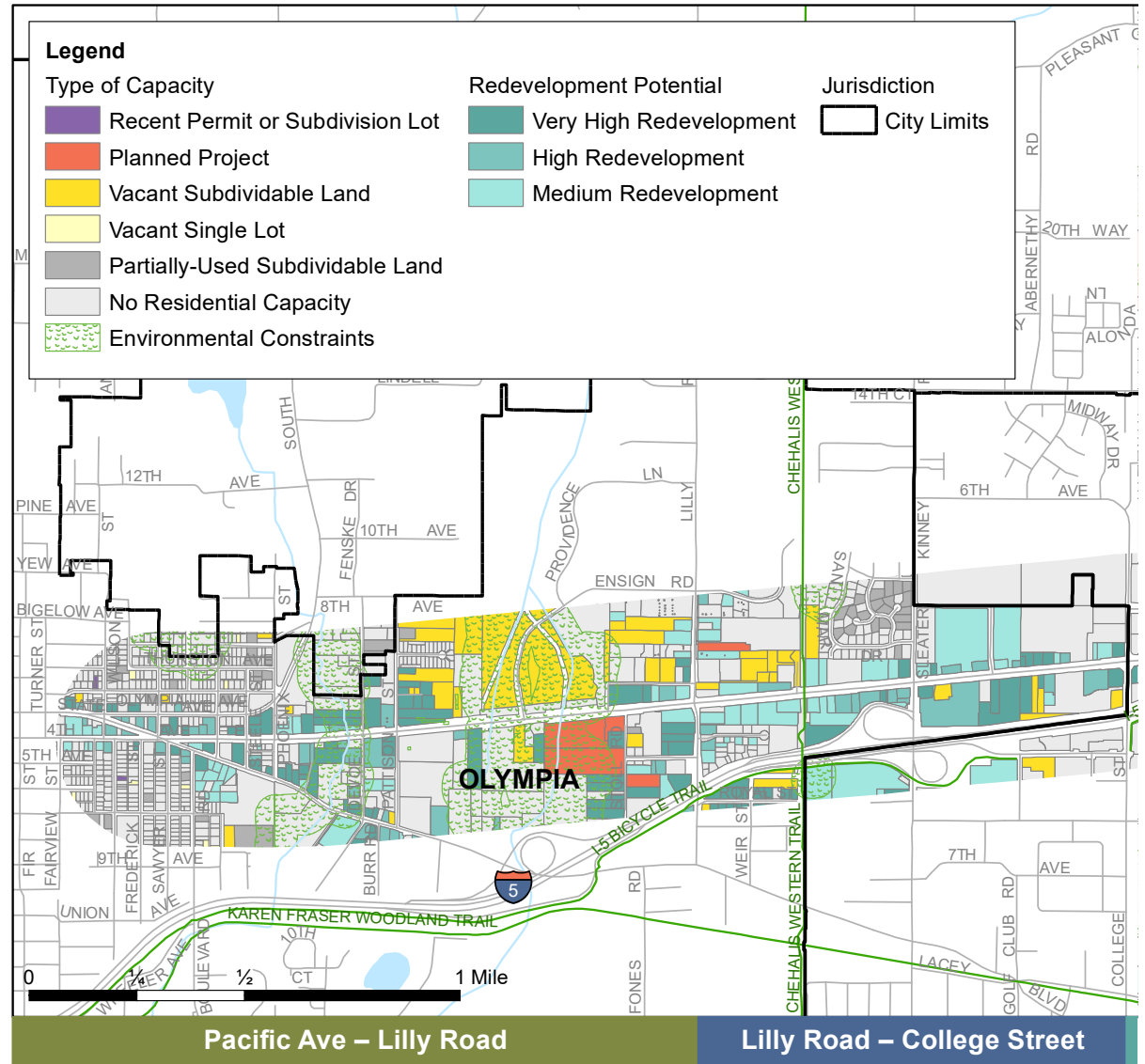


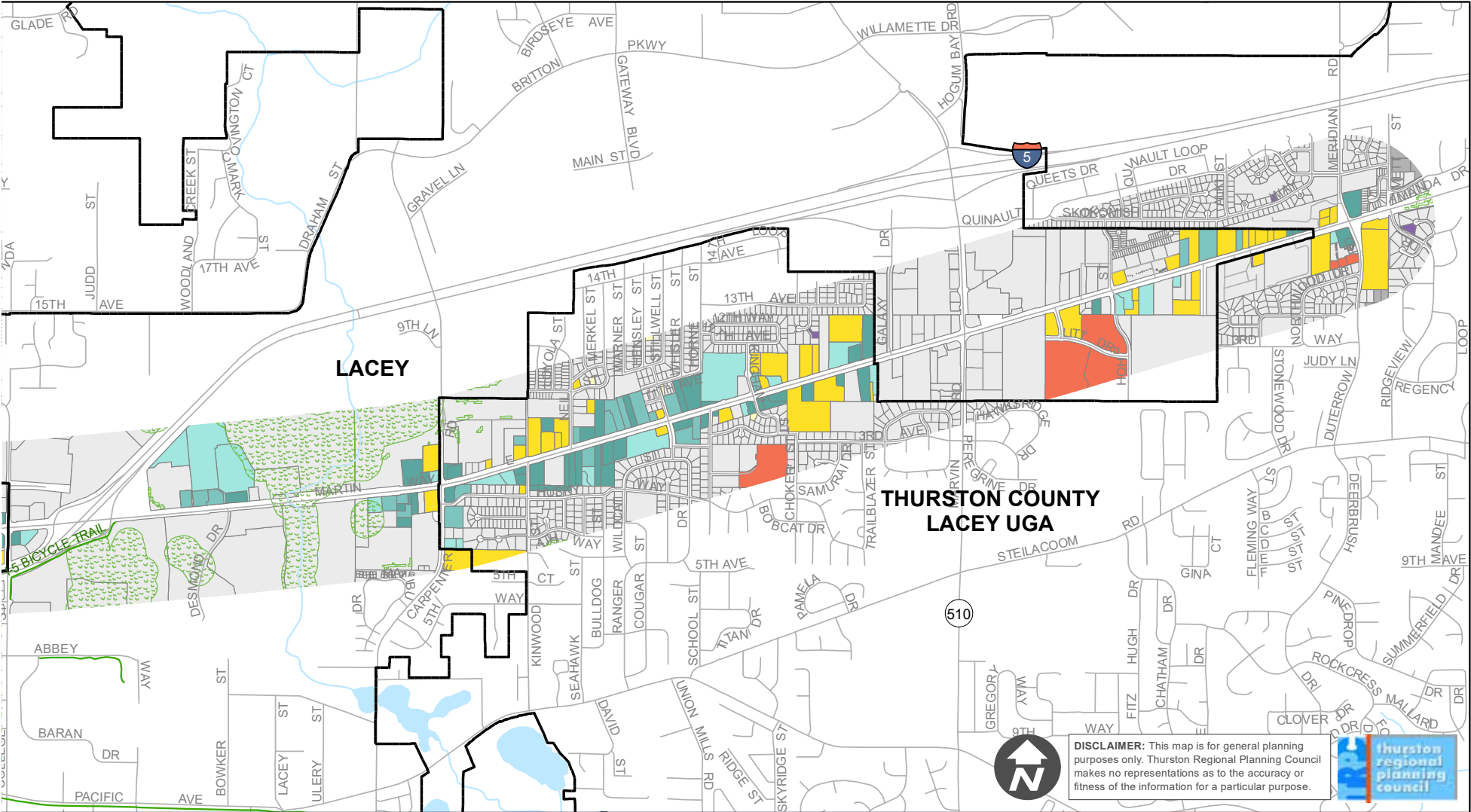
Intercity Transit's new administrative building rises next to the Aztec Lanes Bowling Alley, which was built in 1945.

Development Potential

The corridor has very little remaining vacant land, but the potential for substantial redevelopment of mixed use and commercial areas (Table 13). Map 11 identifies land with development potential as well as those parcels that may be most likely to redevelop (see Table 12 for definitions). Land with development potential includes vacant parcels, as well as those that could be subdivided or further developed under existing regulations. Redevelopment usually takes place when land prices rise at a greater rate than building values, especially as vacant land becomes increasingly scarce. Properties with redevelopment potential are those where the existing buildings have a low value compared to the land value. Map 11 also identifies where development may face significant environmental constraints, such as areas adjacent to Woodard and Woodland Creeks and the extensive wetlands around them.

Map 11. Development and redevelopment potential, Martin Way Corridor





College – Carpenter

Carpenter Road – Marvin Road

Marvin Road – Meridian/Duterrow Road

Chapter 4 Land Use

The section of the corridor from Carpenter to Marvin Road has the greatest cluster of parcels with redevelopment potential (100 acres), most of these very high (58 acres). The section from Pacific Avenue to Lilly Road also has substantial redevelopment potential, but these parcels are more likely to be constrained by wetlands and other critical areas. This section has the greatest amount of vacant land, however, most of this is tied to two parcels along Ensign Road that are zoned as high-density multifamily and currently owned by the Sisters of Providence. In the easternmost section of the corridor, Marvin Road to Meridian Avenue, most development is newer and therefore has the least redevelopment potential, though that section does still have some remaining vacant land. While redevelopment presents

Table 12. Definitions of Redevelopment Potential. Source: Population and Employment Land Supply Assumptions for Thurston County, 2019

Category	Building area to Parcel Area ratio (sq. ft. building/acre)	Building to Land Value
Vacant	<3,000 sq. ft./acre	n/a
Very High Redevelopment Potential	>3,000 sq. ft./acre	0.0-0.5
High Redevelopment Potential	>3,000 sq. ft./acre	0.5-1.0
Medium Redevelopment Potential	>3,000 sq. ft./acre	1.0-2.0

Table 13. Acres of Land with Development and Redevelopment Potential, Martin Way Corridor. Source: Thurston Regional Planning Council

Acres	Pacific - Lilly	Lilly-College	College-Carpenter	Carpenter-Marvin	TOTAL Martin Way Focus Area	Marvin-Meridian	TOTAL Martin Way Corridor
Developable Land (Acres)							
Vacant Single Lots	1.0	0.0	0.0	0.8	1.8	0.0	1.8
Vacant Subdividable Land	51.8	15.5	4.6	44.5	116.5	35.4	151.8
Partially Used Subdividable Land	10.3	7.8	0.0	0.0	18.2	3.6	21.7
Subtotal	63.2	23.2	4.6	45.4	39.0	136.4	175.4
Redevelopable Land (Acres)							
Very High	57.2	19.3	11.0	57.8	145.3	12.6	157.9
High	16.6	17.1	5.9	17.3	56.9	5.1	62.0
Medium	20.1	53.4	25.9	24.5	124.0	5.3	129.3
Subtotal	93.9	89.8	42.8	99.5	326.1	23.0	349.1
TOTAL	157.1	113.1	47.5	144.9	462.6	62.0	524.5

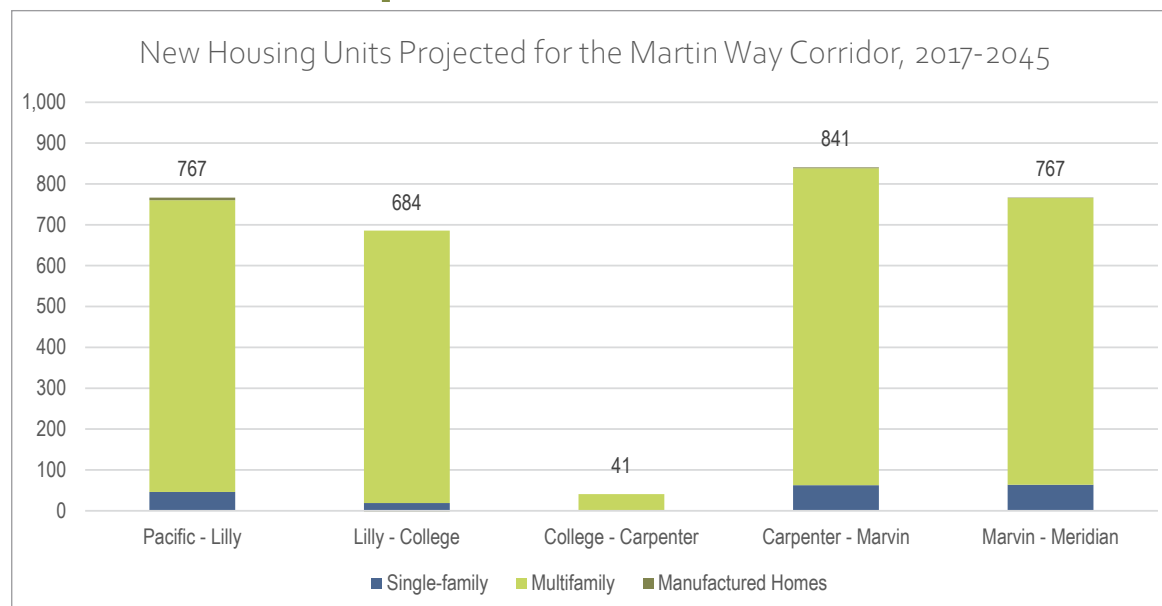
an opportunity for building styles and frontage improvements that better support the vision for Martin Way, there are many barriers including the cost of bringing properties up to meet newer requirements for stormwater and road frontage. To be cost effective, redevelopment may require consolidating existing parcels that are currently under separate ownership.

Future development

Looking ahead, the Martin Way Corridor is projected to add more than 3,000 new housing units over the next 25 years, a 78 percent jump from the number that existed in 2017. The

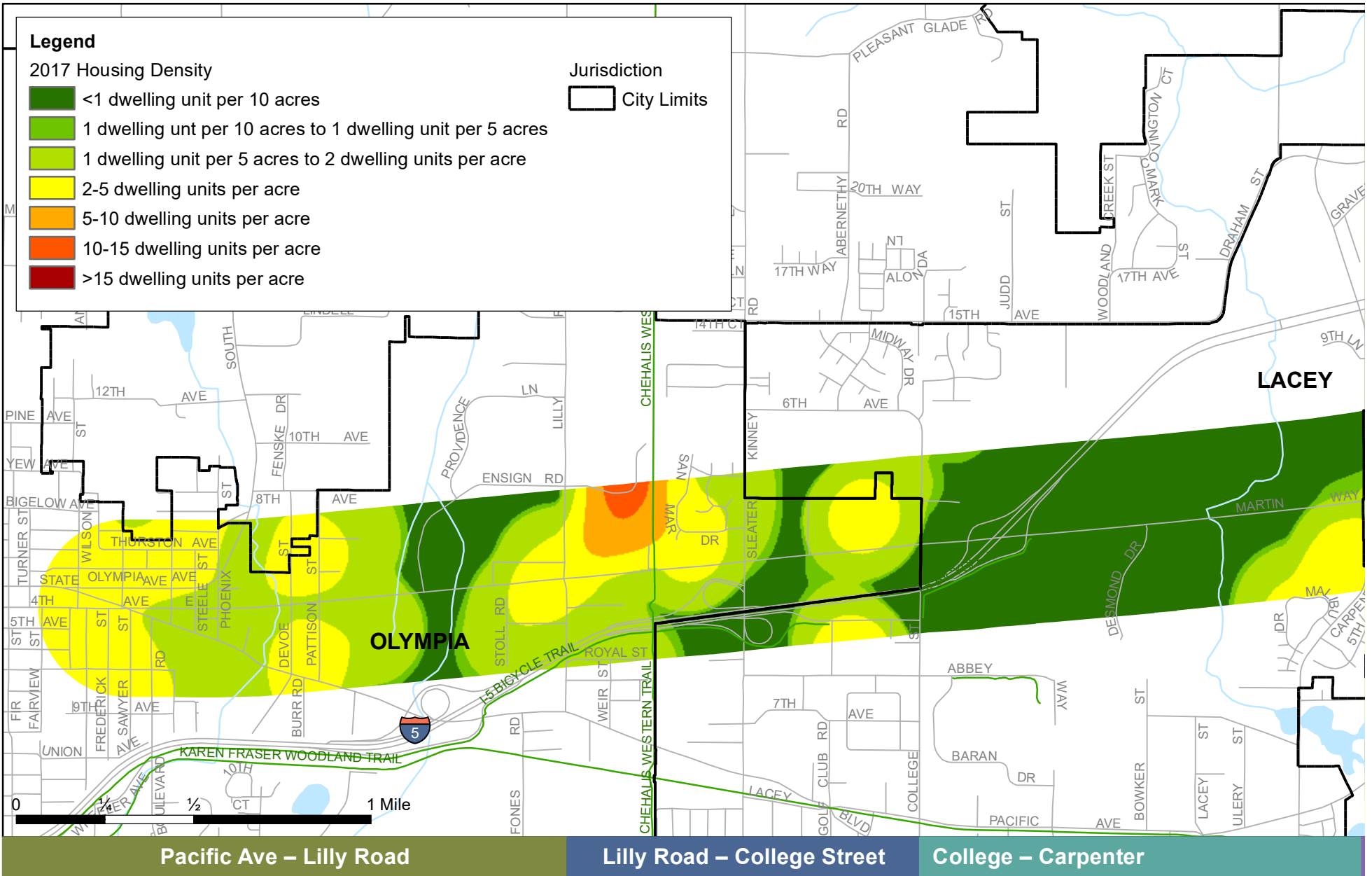
majority of these are anticipated to be multifamily units, further cementing this as the predominant housing type along the corridor. With the exception of the portion from College to Carpenter, all sections of the corridor are likely to see substantial increases in multifamily development. The area between Pacific Avenue to Lilly Road is set for the greatest rate of increase in multifamily units, when compared to the relatively few present in that section today. Several housing hubs may form in different areas, based on developable land and existing regulations. Map 12 and Map 13 show how housing density may change in the future.

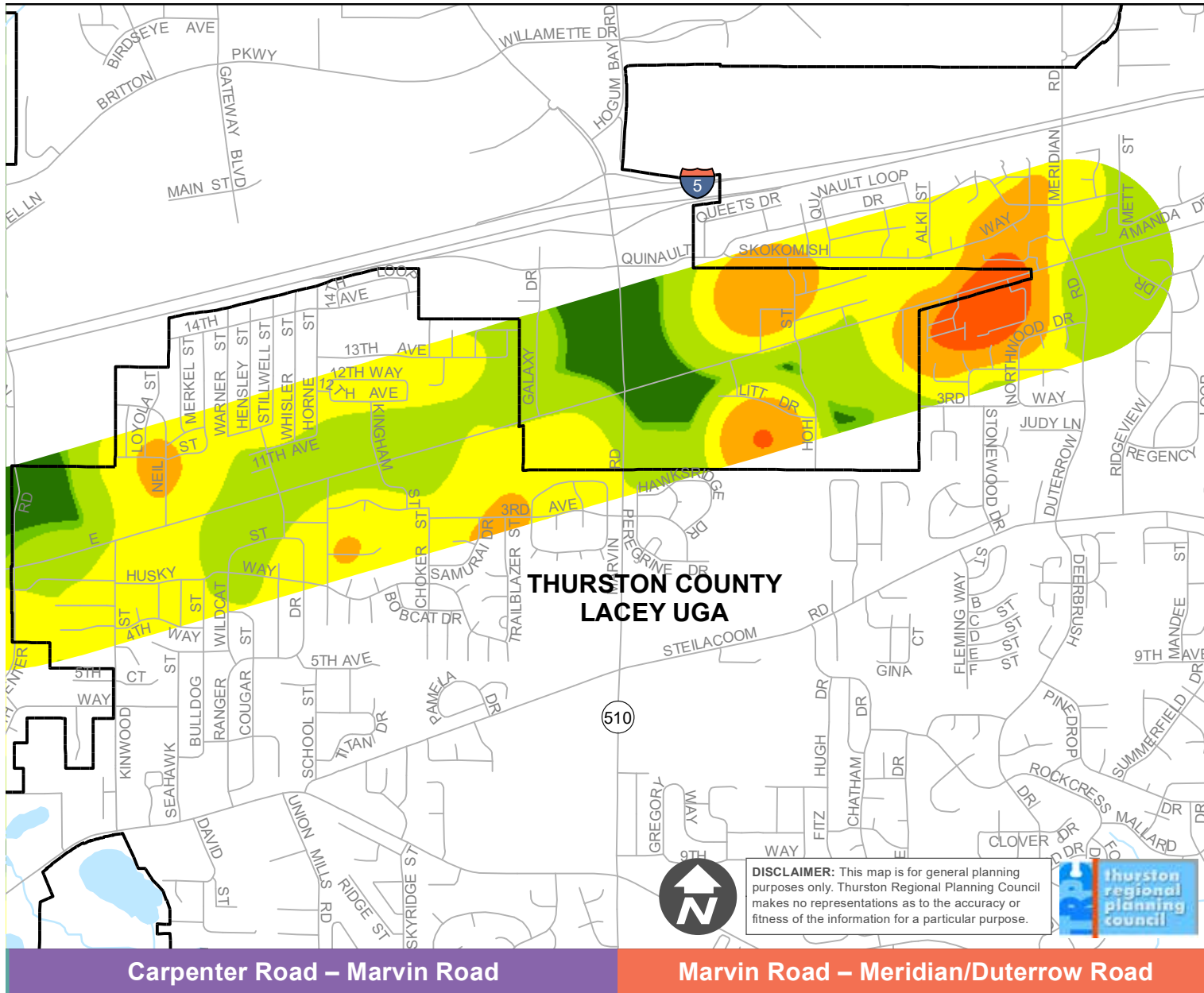
Figure 23. New Housing Units Projected for the Martin Way Corridor, 2017-2045.
 Source: Thurston Regional Planning Council, Population and Employment Forecasts



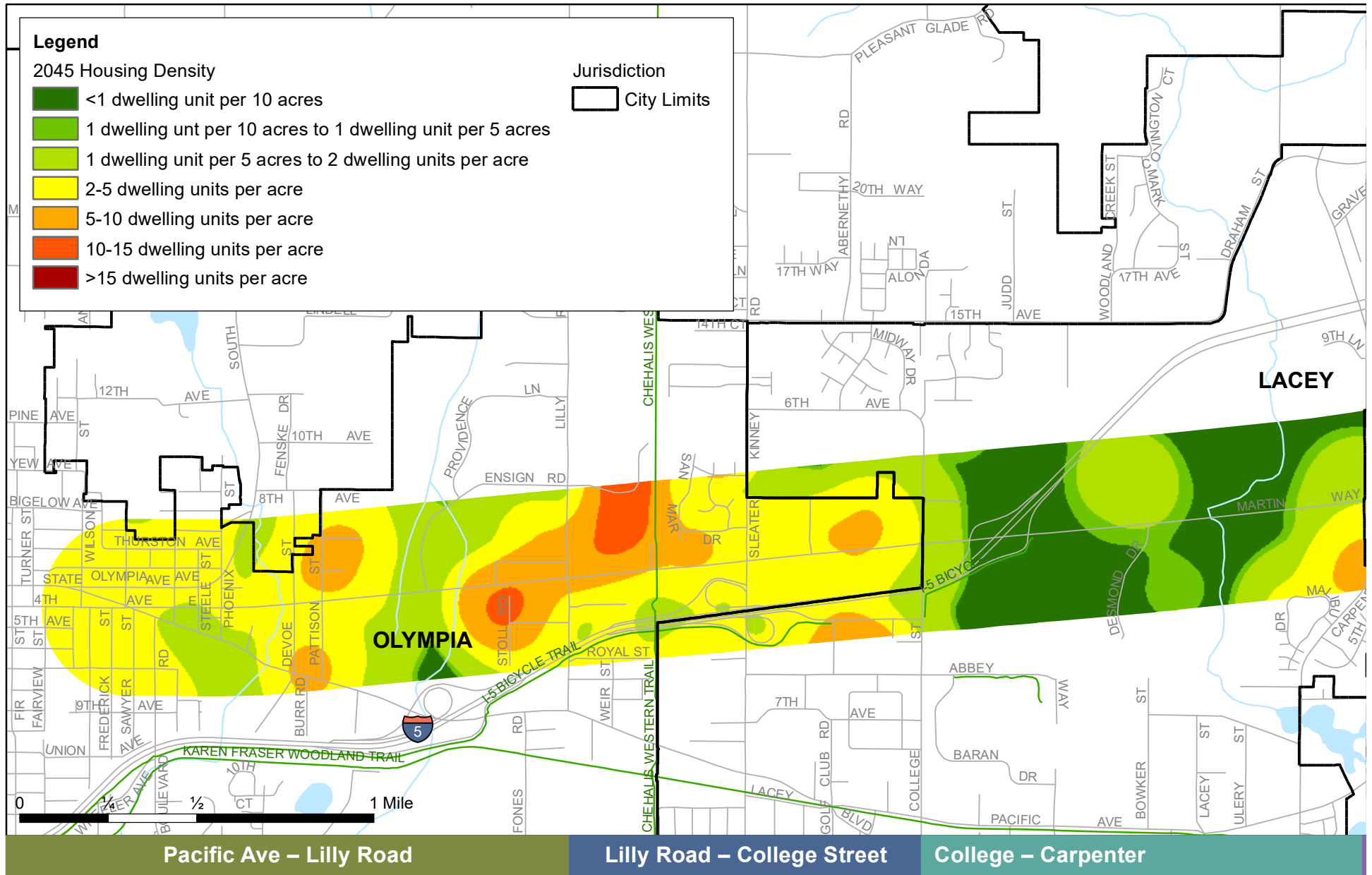
Chapter 4 Land Use

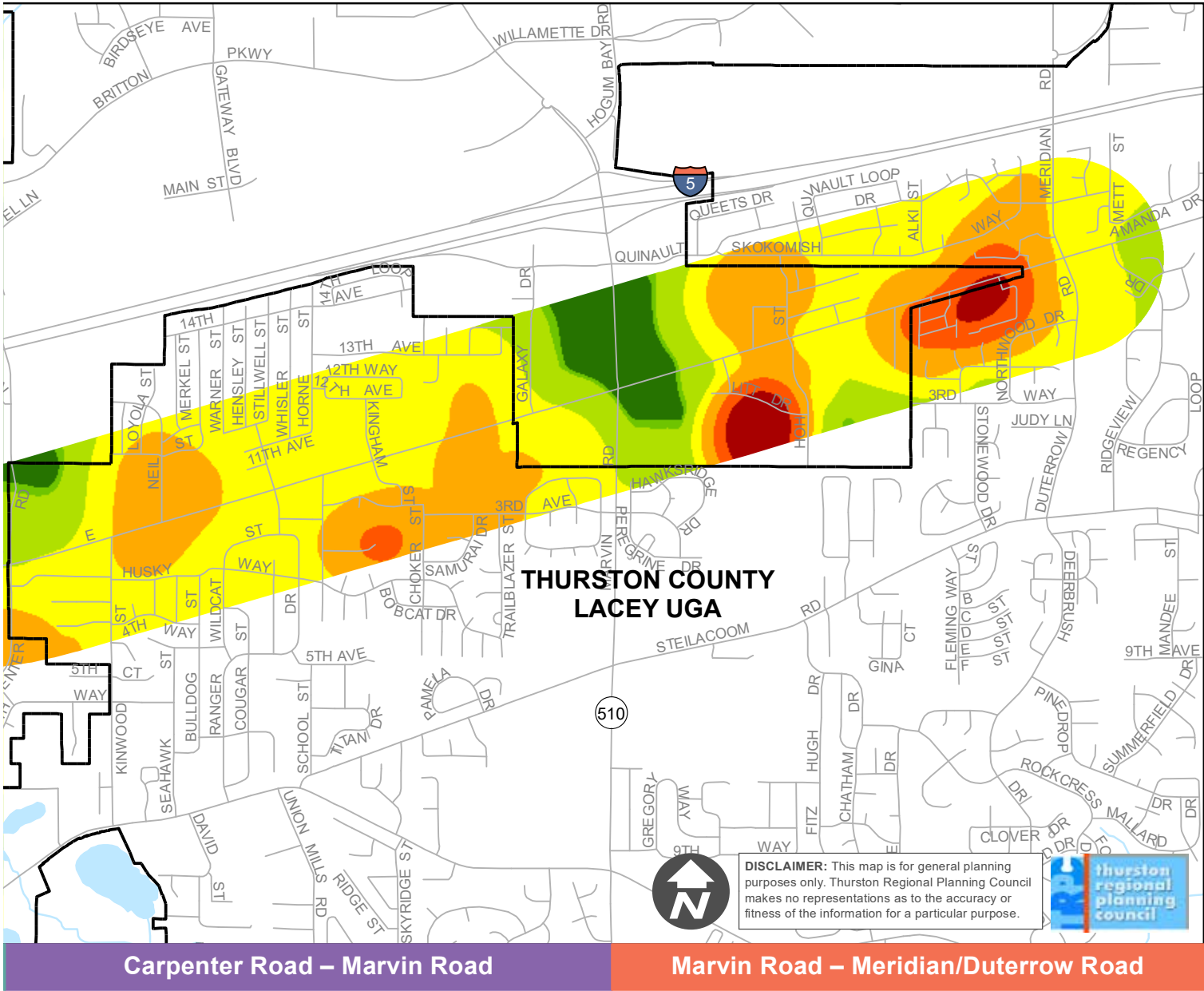
Map 12. Martin Way Corridor, 2017 Residential Density





Map 13. Martin Way Corridor,
2045 Residential Density







Transportation Network

Martin Way is one of the region's most critical transportation corridors. It is the area's primary east-west thoroughfare (aside from I-5), with over 40,000 vehicles using it every day. Pedestrians and bicyclists use Martin Way to get to and from their homes and workplaces and to connect with the area's trail system. Martin Way is also a major artery for transit, with the corridor accounting for approximately seven percent of Intercity Transit's system-wide ridership in 2019.

5.1 Transportation Facilities

Martin Way is identified as an arterial road by the cities of Olympia and Lacey, and Thurston County. Arterials are streets that are intended to carry high volumes of through traffic, and connect major generators of traffic. They are intended for high use by through, multimodal, and freight travelers.

There are 30 roadways that intersect with Martin Way along the corridor (21 intersections in the project Focus Area, nine in the section from Marvin Road to Meridian Road). Multiple interchanges connect Martin Way to I-5, including direct access at Exit 109, as well as connections on Pacific Avenue, Sleater-Kinney, and Marvin Road. Not all of these are “full” interchanges, with access to both north and south exits. The Sleater-Kinney exit only permits access to southbound I-5, which places more pressure on other interchanges for northbound access.

Figure 24 A wide variety of users travel on Martin Way, including passenger vehicles, transit, freight, pedestrians, and cyclists.



Intercity Transit operates and manages the Martin Way Park & Ride lot, just east of the Martin Way-Interstate 5 interchange (Exit 109), in partnership with the Washington Department of Transportation. The lot includes 318 parking stalls and sees use seven days a week. In 2019, the lot had an average of 140 vehicles on weekdays and 85 vehicles on weekend days.

5.2 Motor Vehicle Traffic

Traffic Counts and Volumes

Along Martin Way, traffic volumes peak approaching the Martin Way/ Interstate 5 interchange near College Street and taper off toward the project boundaries. Since 2018, traffic volumes have slowly increased with the residential and commercial growth experienced in the Lacey Urban Growth Area around the Marvin Road/Martin Way intersection.

Table 14. Traffic Counts at Key Martin Way intersections.

Location	Average Daily Traffic	Jurisdiction	Year
4th Avenue W of Chambers Street	12,427	Olympia	2018
4th Avenue W of Phoenix Street	13,271	Olympia	2018
Martin Way W of Devoe Street	14,387	Olympia	2018
Martin Way W of Pattison Street	16,383	Olympia	2019
Martin Way E of Ensign Road	12,121	Olympia	2017
Martin Way at Chehalis Western Trail	20,442	Olympia	2021
Martin Way E of Sleater Kinney Road	23,503	Olympia	2021
Martin Way W of College Street	24,696	Olympia	2017
Martin Way E of College Street	48,192	Lacey	2018
Martin Way W of Regal Cinema	35,560	Lacey	2018
Martin Way and Kinwood Street	28,150	Thurston County	2017
Martin Way and Ranger Drive	25,461	Thurston County	2017
Martin Way and Kingham Street	26,277	Thurston County	2017
Martin Way W of Marvin Road	27,862	Lacey	2018
Martin Way E of Marvin Road	23,683	Lacey	2018
Martin Way and Dutterow Road	24,247	Thurston County	2017

Level of Service

For the Thurston Region, a road's level of service (LOS) is a measure of how "full" or congested the road is during its two busiest hours—in the evening from 4 pm to 6 pm. Roads in urban centers and corridors are typically expected to function at LOS E or better. This means that delays during rush hour due to traffic volumes are anticipated, expected, and acceptable. The Martin Way corridor, however, is a designated Strategy Corridor, meaning traffic volumes are allowed to exceed the adopted LOS, and excessive delays during rush hour are anticipated, expected, and acceptable. Currently, Martin Way functions at LOS E or better (Map 14); the busiest portions of the corridor are near the Martin Way/I-5 interchange and the intersection with Marvin Road.

By 2045, traffic volumes are expected to increase significantly on Martin Way with areas experiencing traffic delays to expand considerably, particularly in between College Street and Marvin Road (Map 15). These future conditions take into consideration the projected land use and transportation construction projects that have already received funding and are highly likely to be constructed by 2045. It does not include transportation construction that may be on a longer timeframe, including future projects identified in section 5.6. This increased congestion will impact people traveling by other modes, especially transit. The College-Carpenter and Carpenter-Marvin segments are forecast to experience the most significant impacts, with the intersection at Martin Way and Marvin Road also seeing increased congestion.

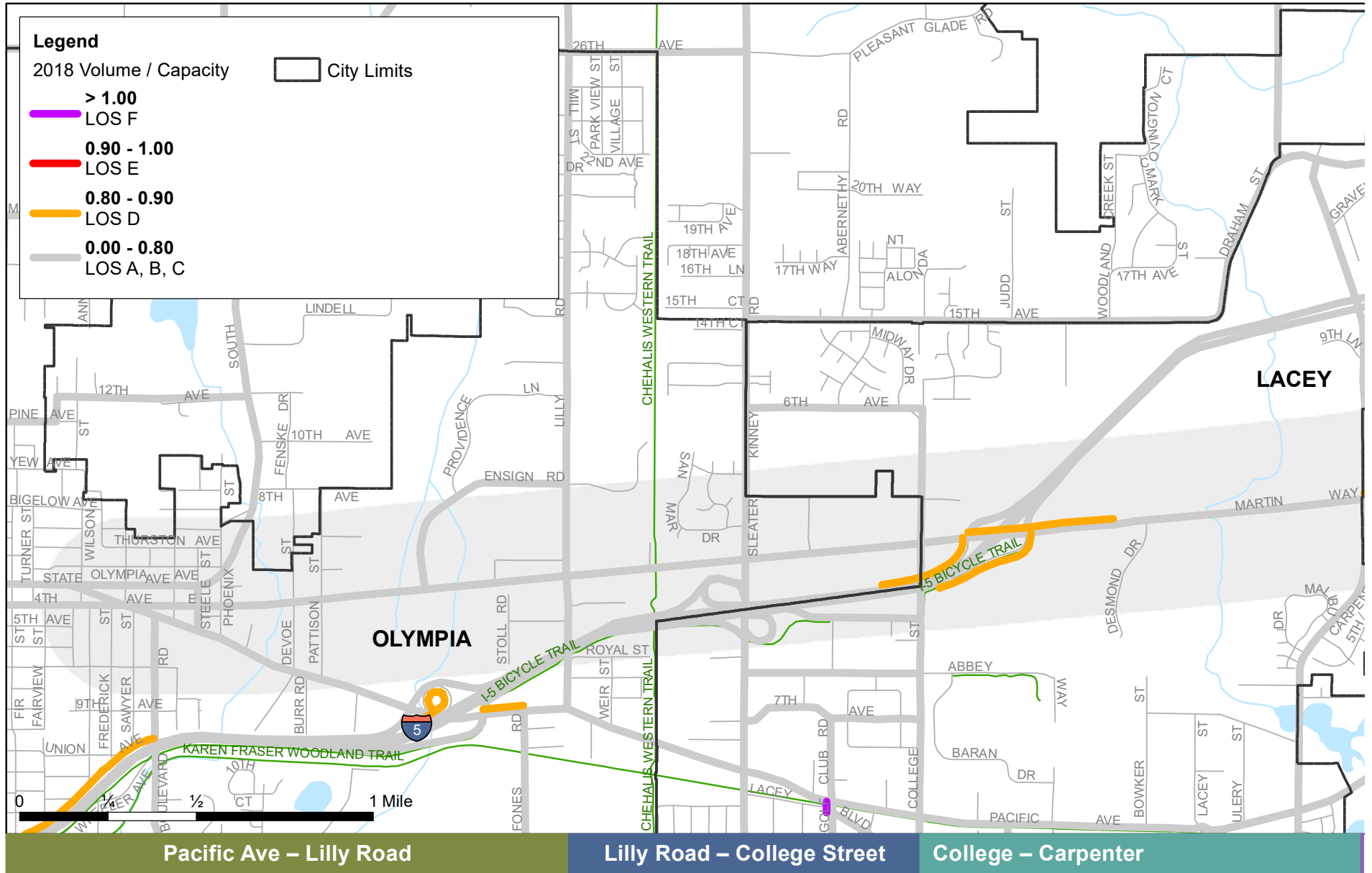
Table 15. Level of Service Definitions.

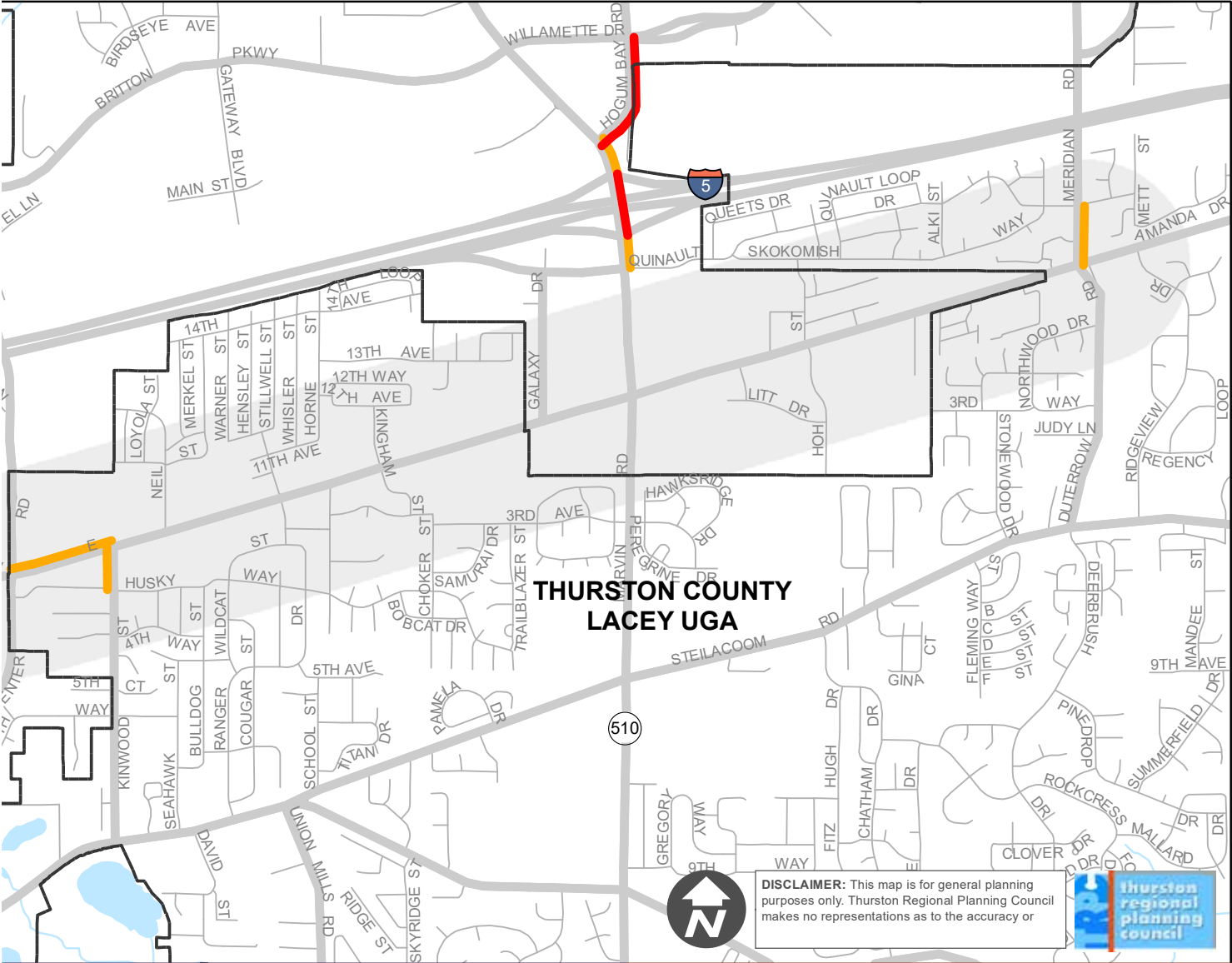
Level of Service	Definition
A	Free flow. Traffic flows at or above the posted speed limit and motorists have complete mobility between lanes. The average spacing between vehicles is about 550 ft(167m) or 27 car lengths. Motorists have a high level of physical and psychological comfort. The effects of incidents or point breakdowns are easily absorbed.
B	Reasonably free flow. LOS A speeds are maintained, maneuverability within the traffic stream is slightly restricted. The lowest average vehicle spacing is about 330 feet or 16 car lengths. Motorists still have a high level of physical and psychological comfort.
C	Stable flow, at or near free flow. Ability to maneuver through lanes is noticeably restricted and lane changes require more driver awareness. Minimum vehicle spacing is about 220 ft or 11 car lengths. Most experienced drivers are comfortable, roads remain safely below but efficiently close to capacity, and posted speed is maintained. Minor incidents may still have no effect, but localized service will have noticeable effects and traffic delays will form behind the incident.
D	Approaching unstable flow. Speeds slightly decrease as traffic volume slightly increase. Freedom to maneuver within the traffic stream is much more limited and driver comfort levels decrease. Vehicles are spaced about 160 ft (50m) or 8 car lengths. Minor incidents are expected to create delays. Examples are a busy shopping corridor in the middle of a weekday, or a functional urban highway during commuting hours.
E	Unstable flow, operating at capacity. Flow becomes irregular and speed varies rapidly because there are virtually no usable gaps to maneuver in the traffic stream and speeds rarely reach the posted limit. Vehicle spacing is about 6 car lengths, but speeds are still at or above 50 mph. Any disruption to traffic flow, such as merging ramp traffic or lane changes, will create a shock wave affecting traffic upstream. Any incident will create serious delays. Drivers' level of comfort become poor.
F	Forced or breakdown flow. Every vehicle moves in lockstep with the vehicle in front of it, with frequent slowing required. Travel time cannot be predicted, with generally more demand than capacity.

Source: Transportation Research Board Highway Capacity Manual, AASHTO Geometric Design of Highways and Streets

Chapter 5 Transportation Network

Map 14. Roadway Level of Service, 2018.



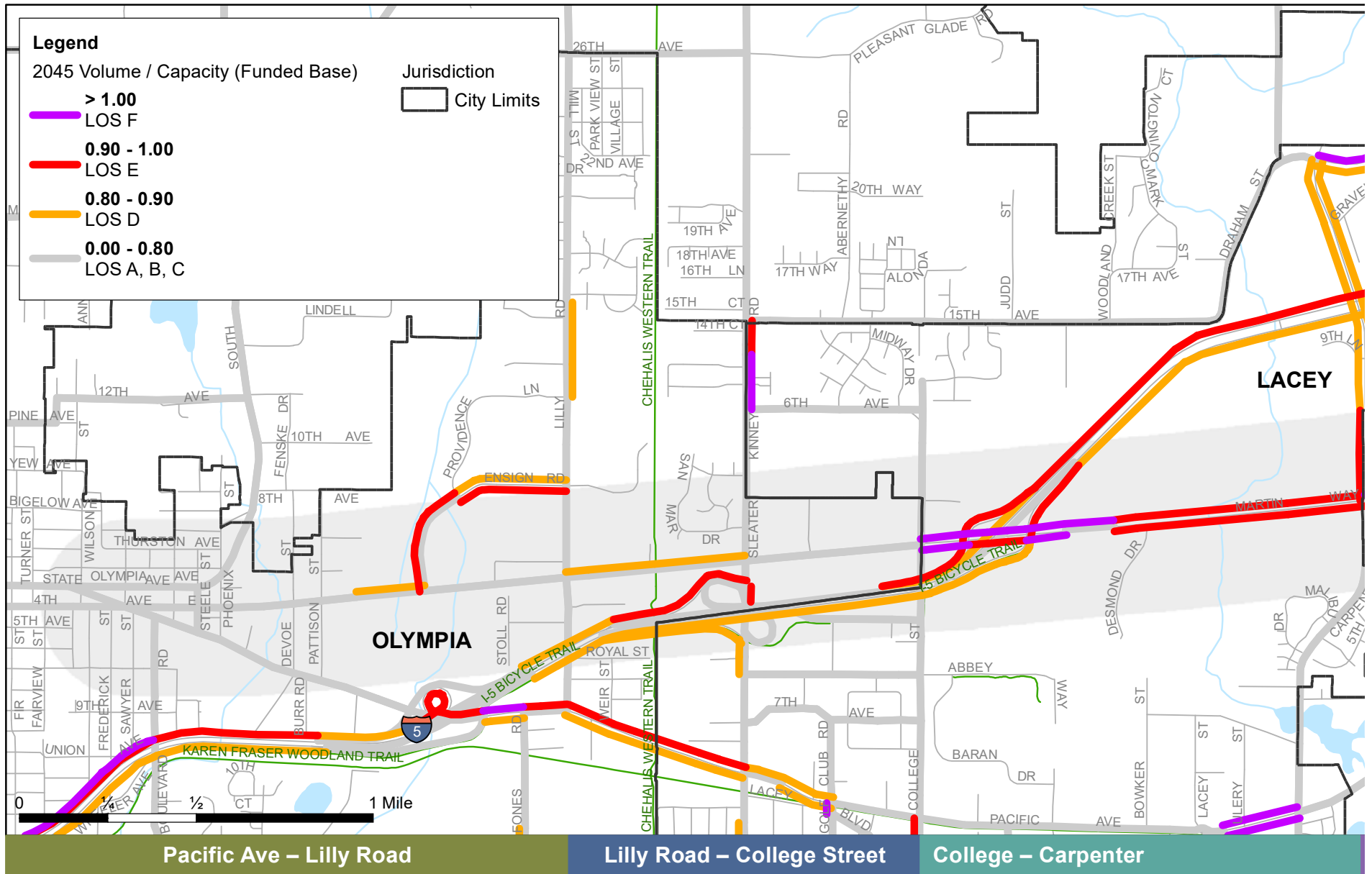


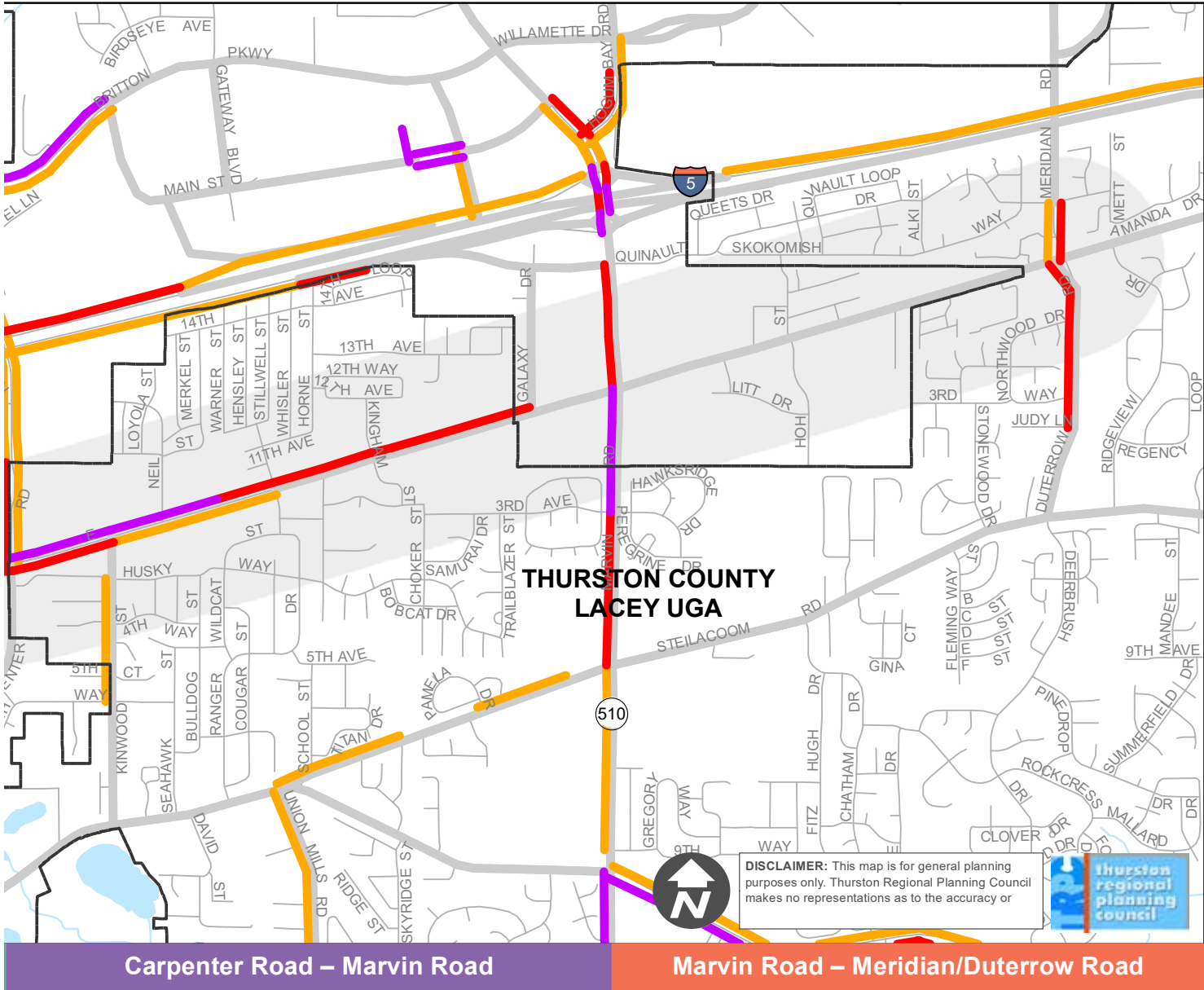
Carpenter Road – Marvin Road

Marvin Road – Meridian/Duterrow Road

Chapter 5 Transportation Network

Map 15. Roadway Level of Service, 2045.

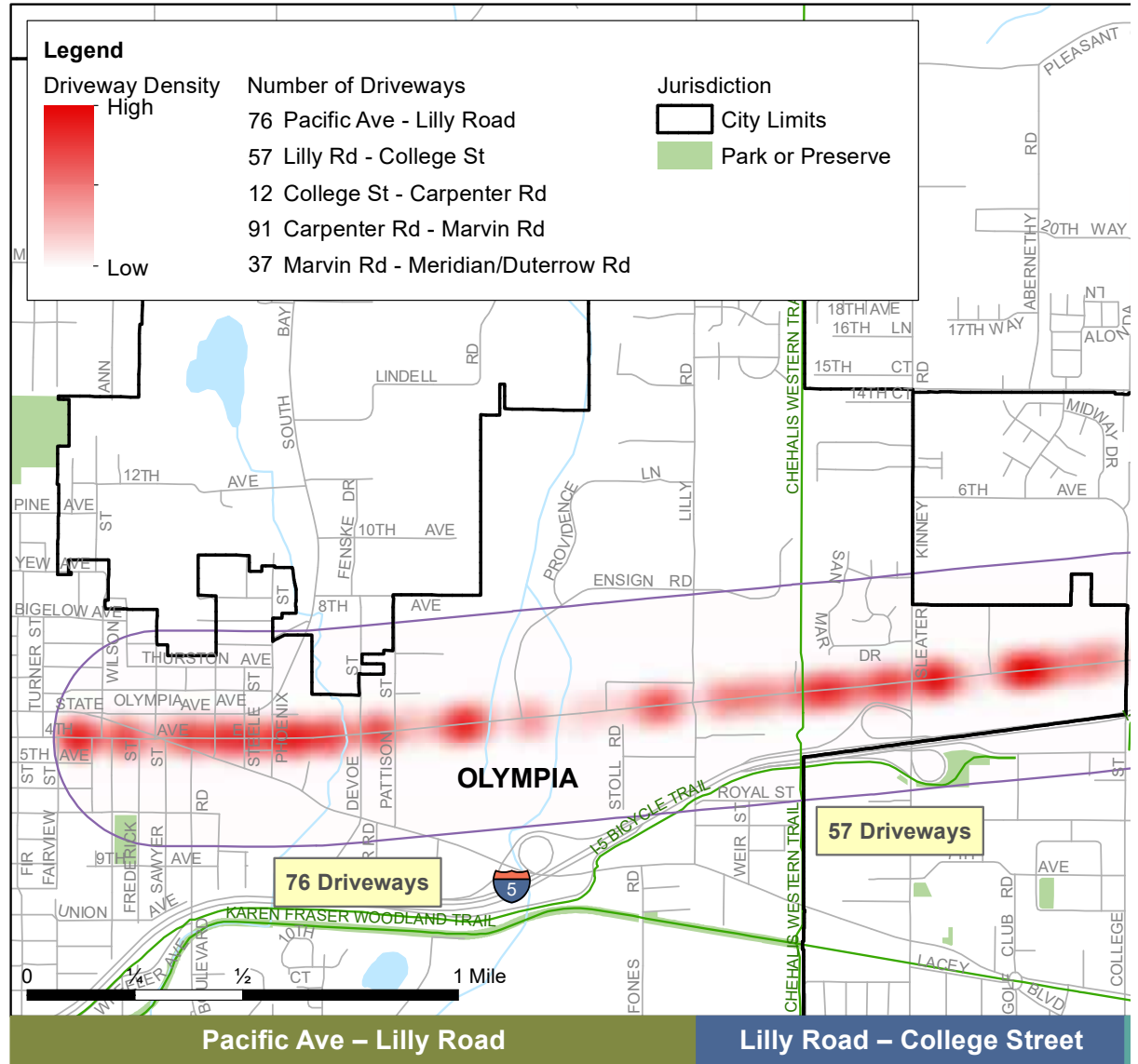


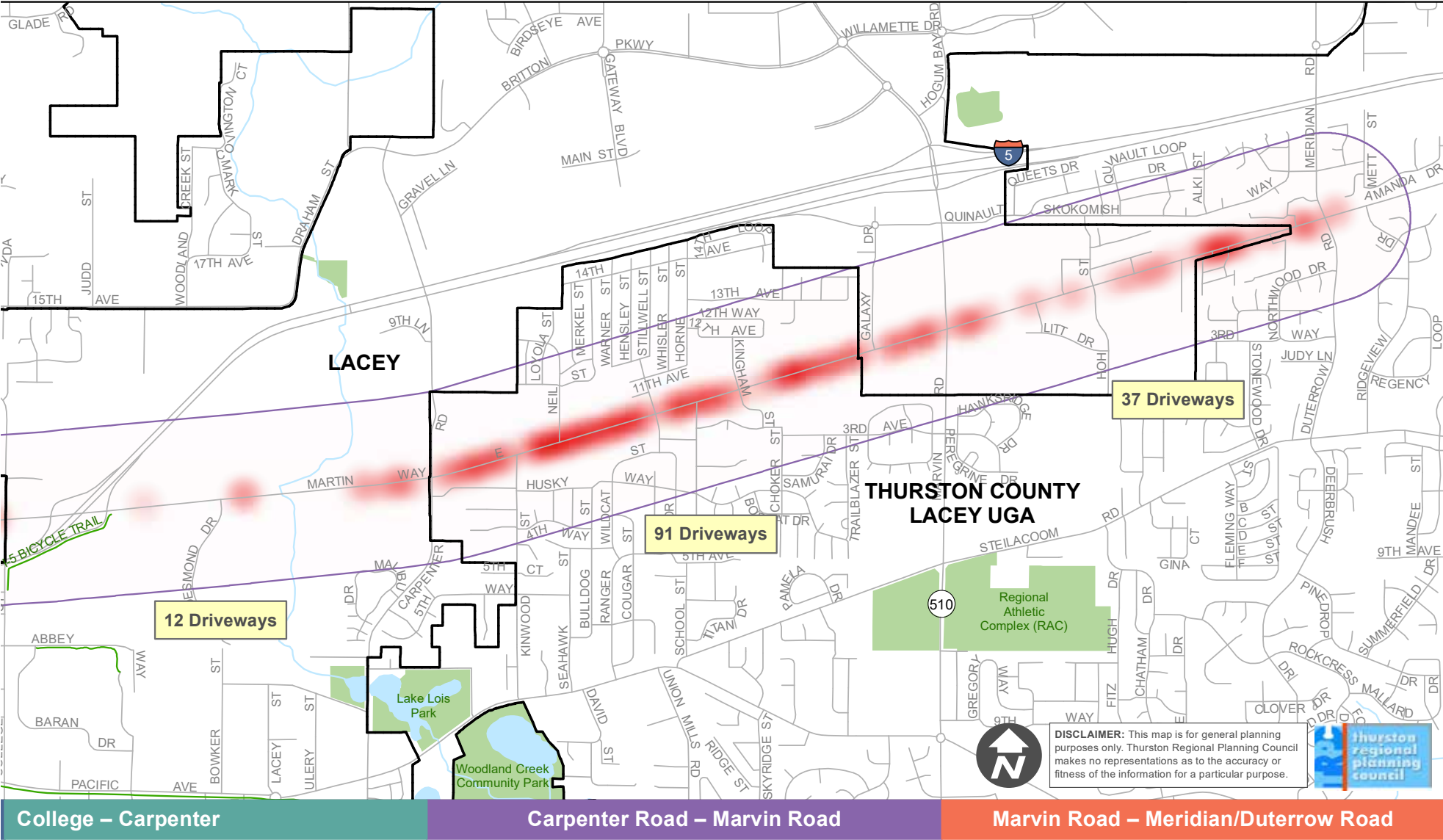


Driveways

TRPC staff reviewed aerial images of the corridor to identify driveways that provide access to and from Martin Way. Map 16 shows the relative density of these access points. The section of the corridor between Carpenter and Marvin Road has the greatest concentration of driveways, with 91 access points identified. Despite similar land uses, the easternmost section from Marvin Road to Meridian has substantially fewer driveways.

Map 16. Concentration of driveway access points along the Martin Way Corridor.

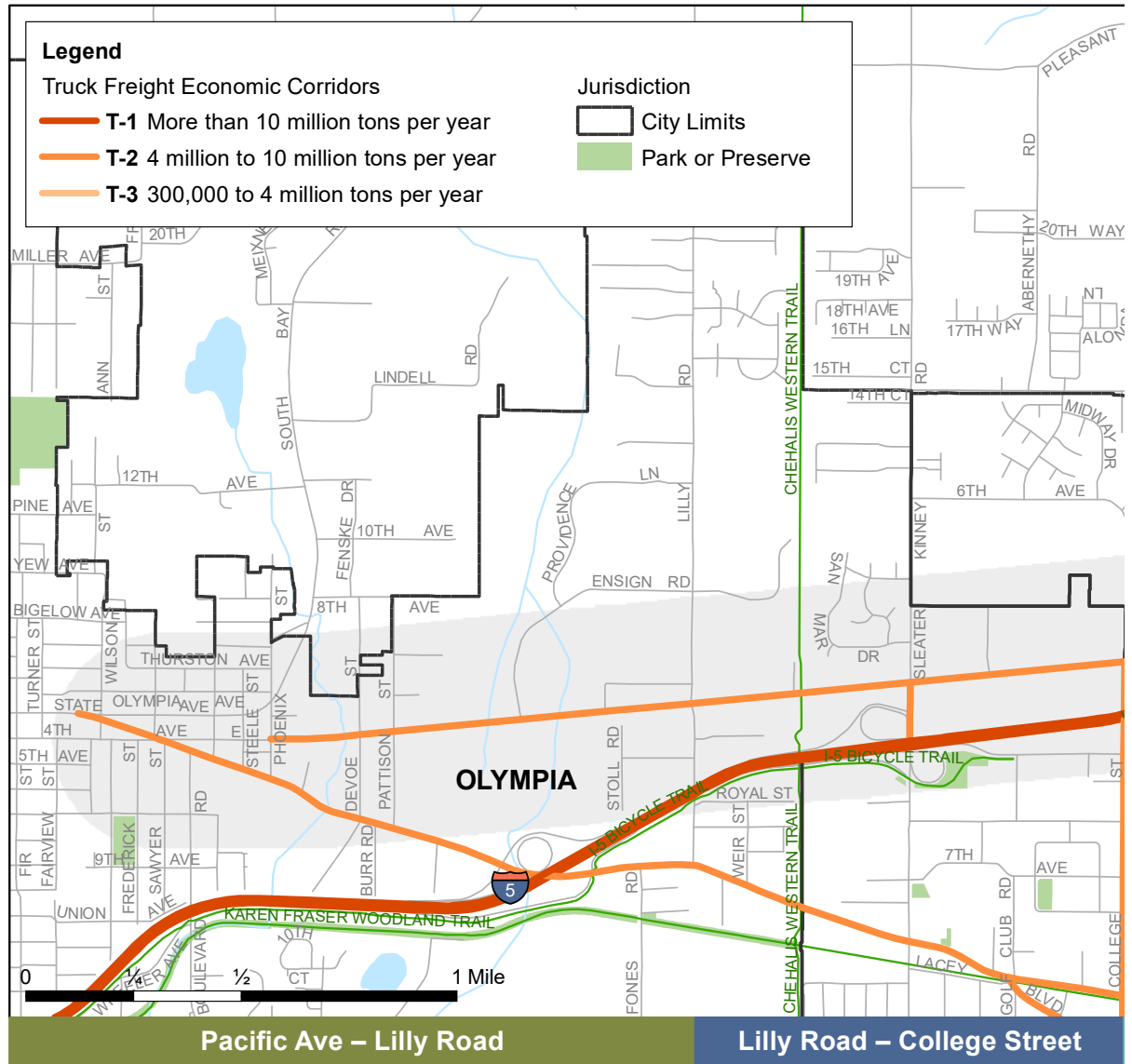


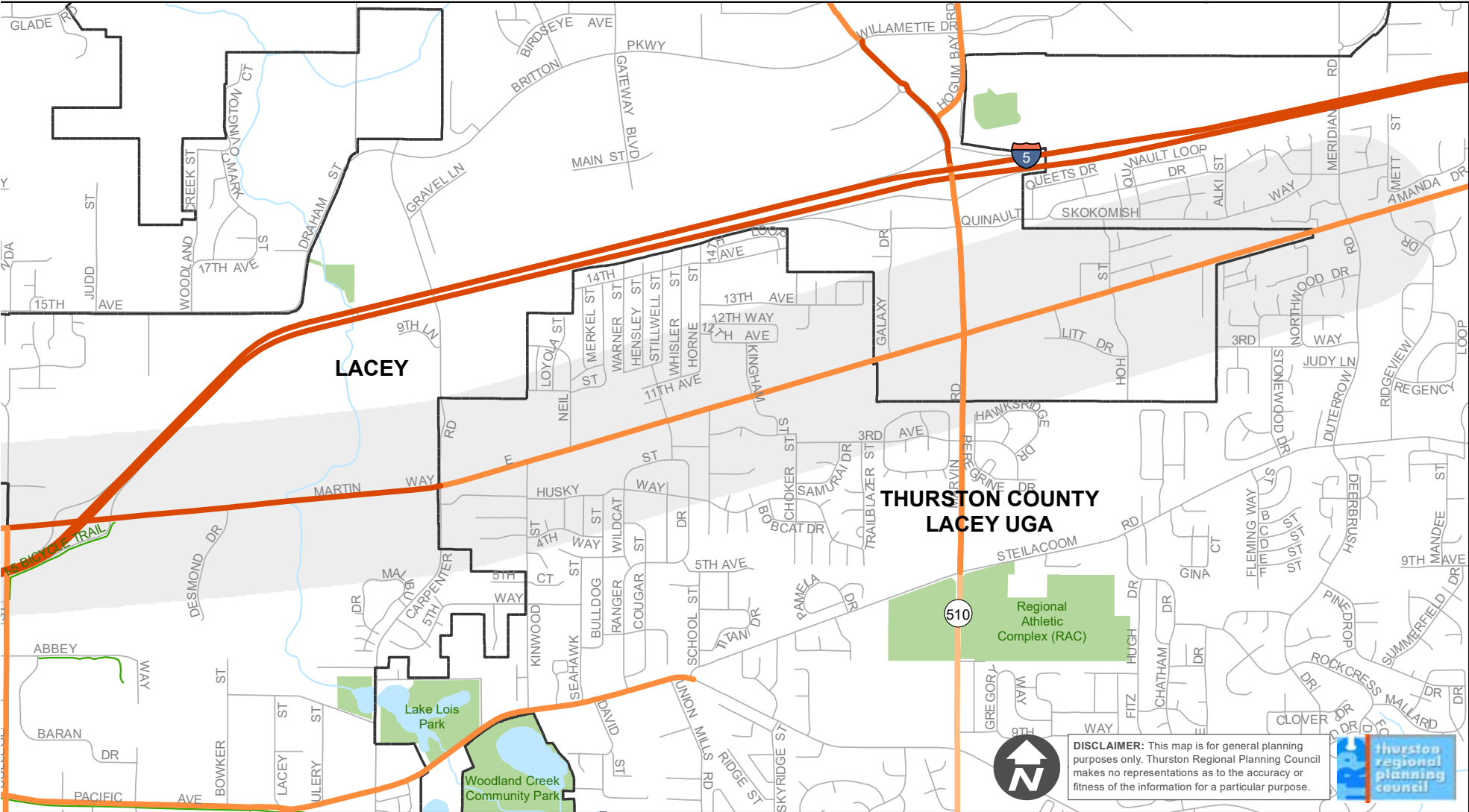


Freight

The Washington State Department of Transportation (WSDOT) classifies Martin Way as a high-volume truck freight corridor, with most of the corridor seeing 4 to 10 million tons of truck freight each year. A primary origin and destination for these freight trips is the Hogum Bay Logistics Center, just north of Martin Way on Marvin Road. The Center is home to over three million square feet of distribution centers for companies such as Target, Uline, Trader Joe's, and Medline.

Map 17. Truck Freight Economic Corridors.





College – Carpenter

Carpenter Road – Marvin Road

Marvin Road – Meridian/Duterrow Road

5.3 Speed

Speed limits differ along the corridor, from a low of 25 mph at the western edge to 40 mph on the central and eastern sections. Most of the corridor is set at a 40-mph speed limit.

5.4 Transit

Martin Way is one of Intercity Transit's most important transit corridors, accounting for approximately 14 percent of the transit agency's revenue service hours and 7 percent of its system-wide ridership in 2019. Intercity Transit is making major, sustained capital and service investments in the corridor, which will help catalyze additional development.

In January of 2020, the agency initiated a five-year zero-fare demonstration project throughout its system in response to the passage of Proposition 1, which provided increased sales tax for a

substantial increase in transit services. Eliminating fare collection is anticipated to increase ridership and the overall efficiency of the transit system.

Routes and Network

Intercity Transit operates seven fixed routes that run at least part of the Martin Way corridor: Routes 60, 62A, 62B, 65, 612, 620, and The One bus rapid transit (BRT) demonstration line. IT also has a major transit hub — the Lacey Transit Center—just south of Martin Way, between Sleater-Kinney Road and College Street, and an operations base, at Martin Way and Pattison Street (Map 18). Several routes, including The One, 62A&B, 612, and 620, serve the Martin Way Park & Ride lot.

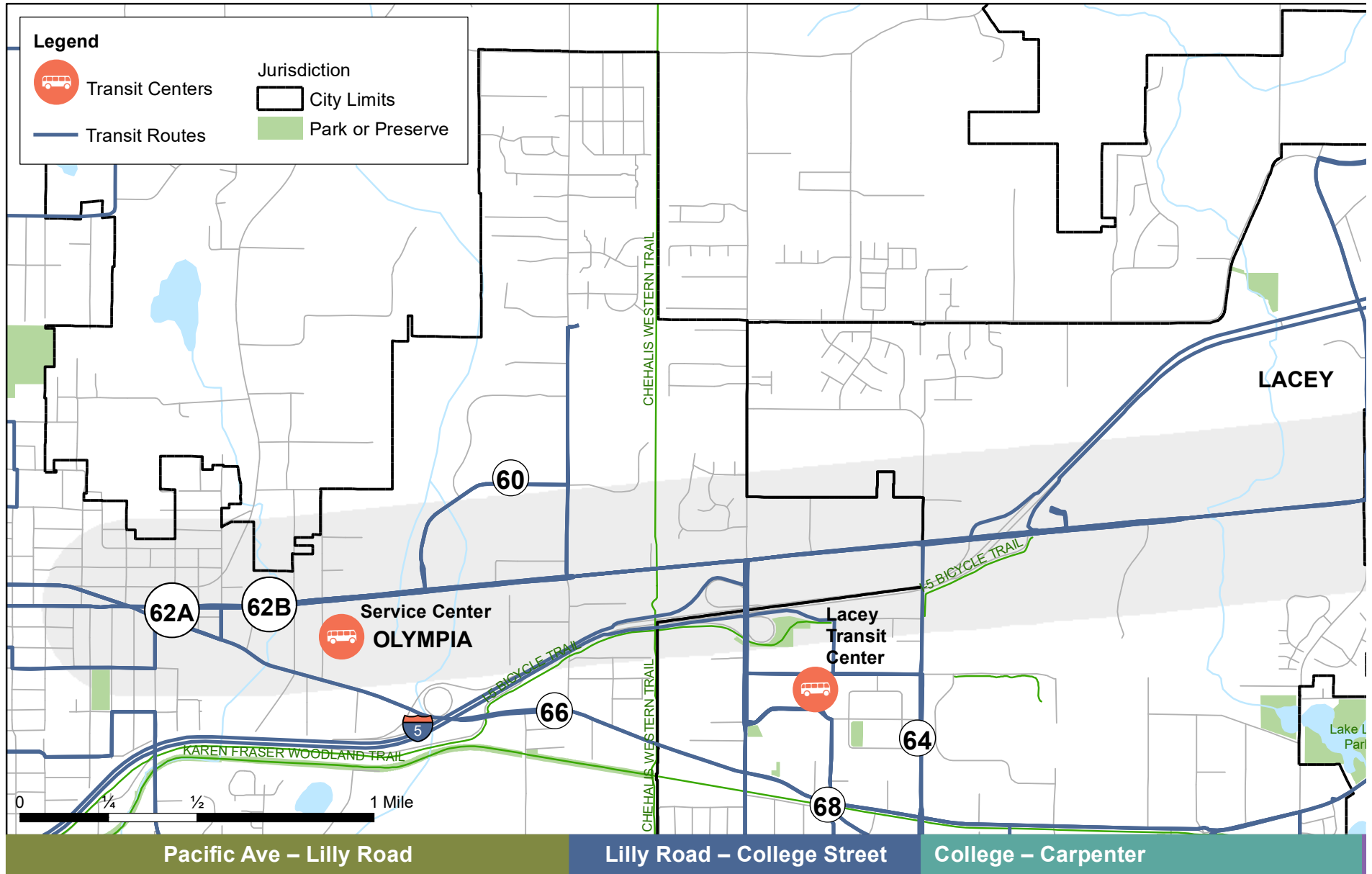
The One, a local express route with limited stops between West Olympia and the Martin Way Park & Ride, is a four-year demonstration project to test the market for Bus Rapid Transit (BRT) type

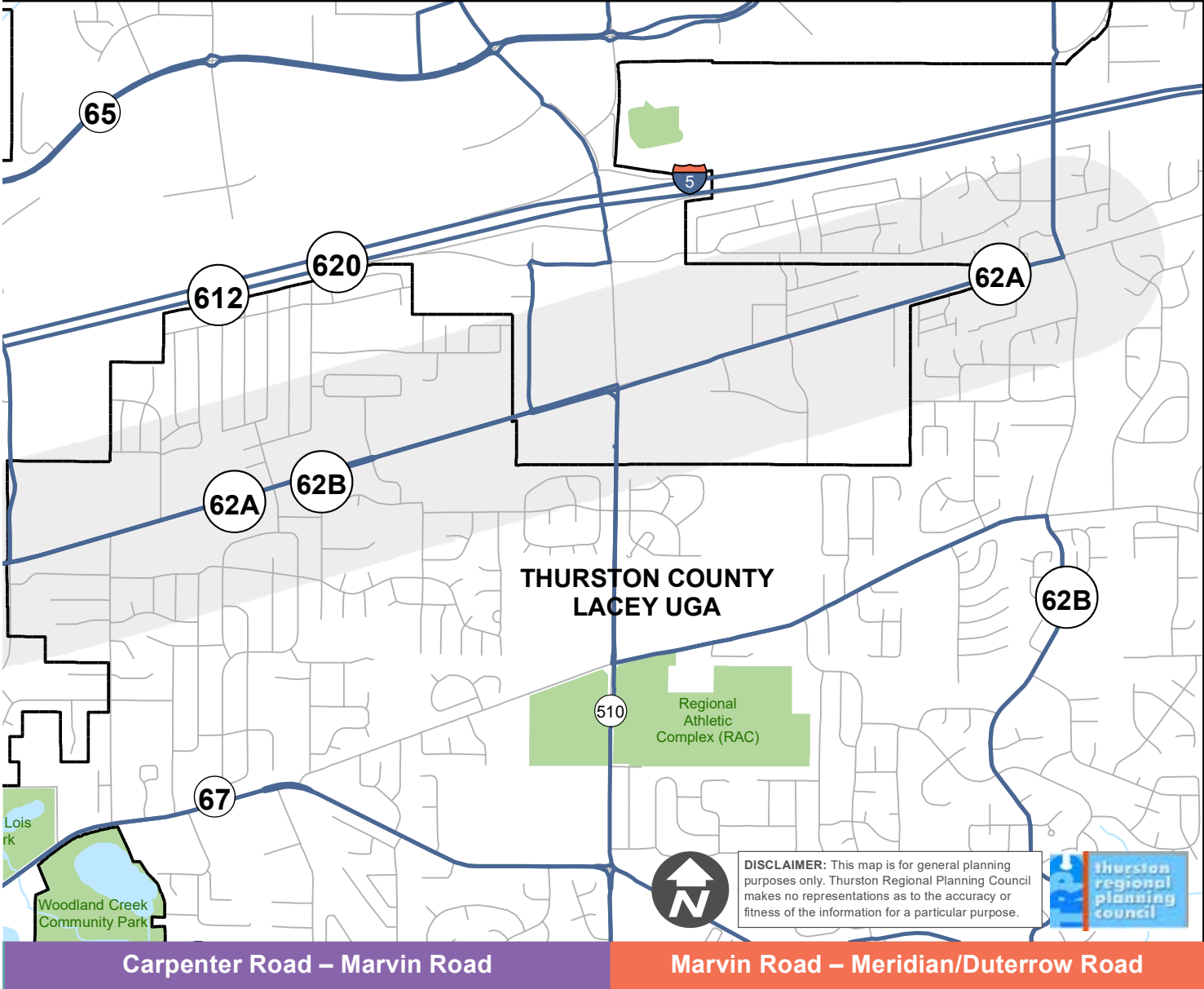
services in the region, as identified in Intercity Transit's Long Range Plan.

Dial-A-Lift is a door-to-door, paratransit service for people with disabilities. IT offers Dial-A-Lift service within three-quarters of a mile of its fixed routes. There were 44,442 Dial-A-Lift paratransit boardings (pick-ups) in 2019 within three-quarters of a mile of the portion of Martin Way within the study area. This figure represents about 30 percent of Intercity Transit's paratransit pick-ups during 2019.



Map 18. Transit Centers and Routes serving the Martin Way Corridor, 2021.

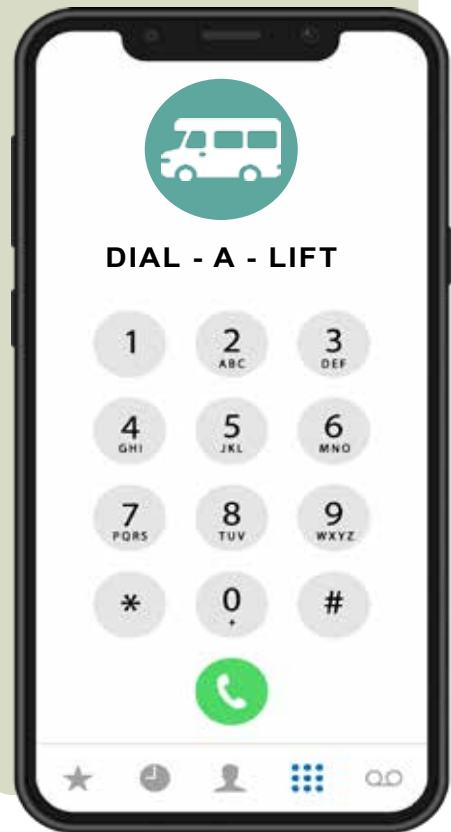




Martin Way Corridor
Dial-A-Lift Boardings (2019):

44,442

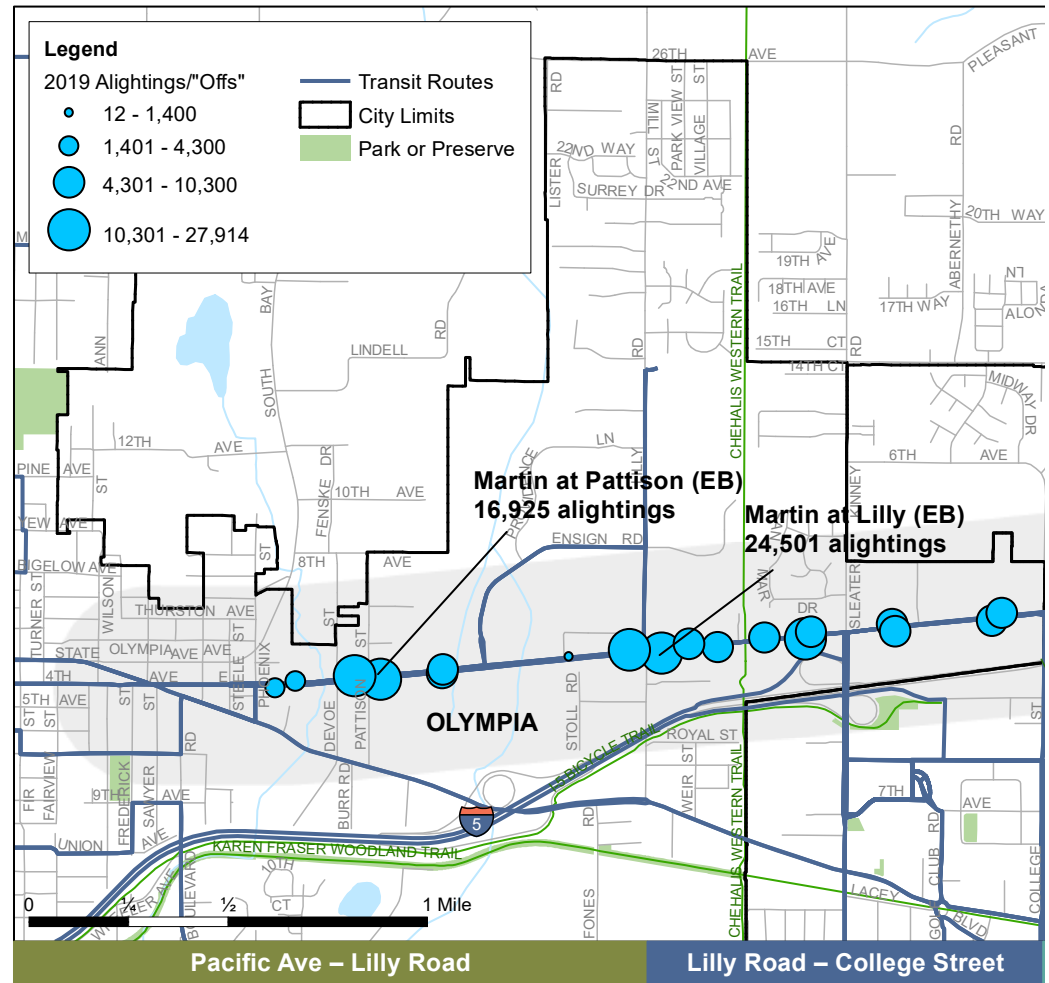
or 30% of all
Intercity Transit
Dial-A-Lift Boardings



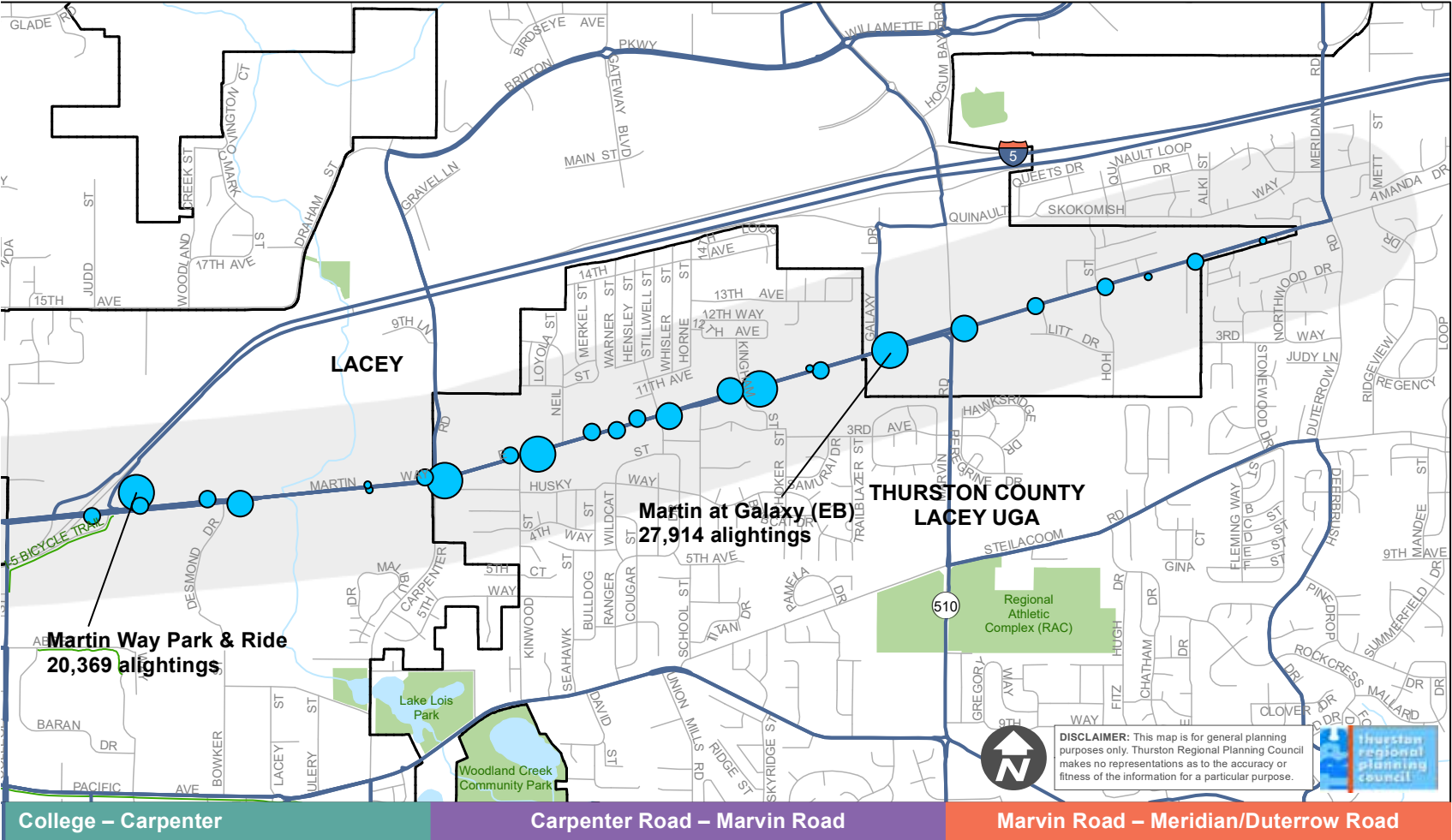
Ridership

Martin Way is a critical east-west corridor for transit users to access a variety of local destinations, including Hawks Prairie, midtown Lacey, and downtown Olympia. Martin Way routes also provide connections to the

Map 19. Intercity Transit Ridership (getting off the bus), 2019.



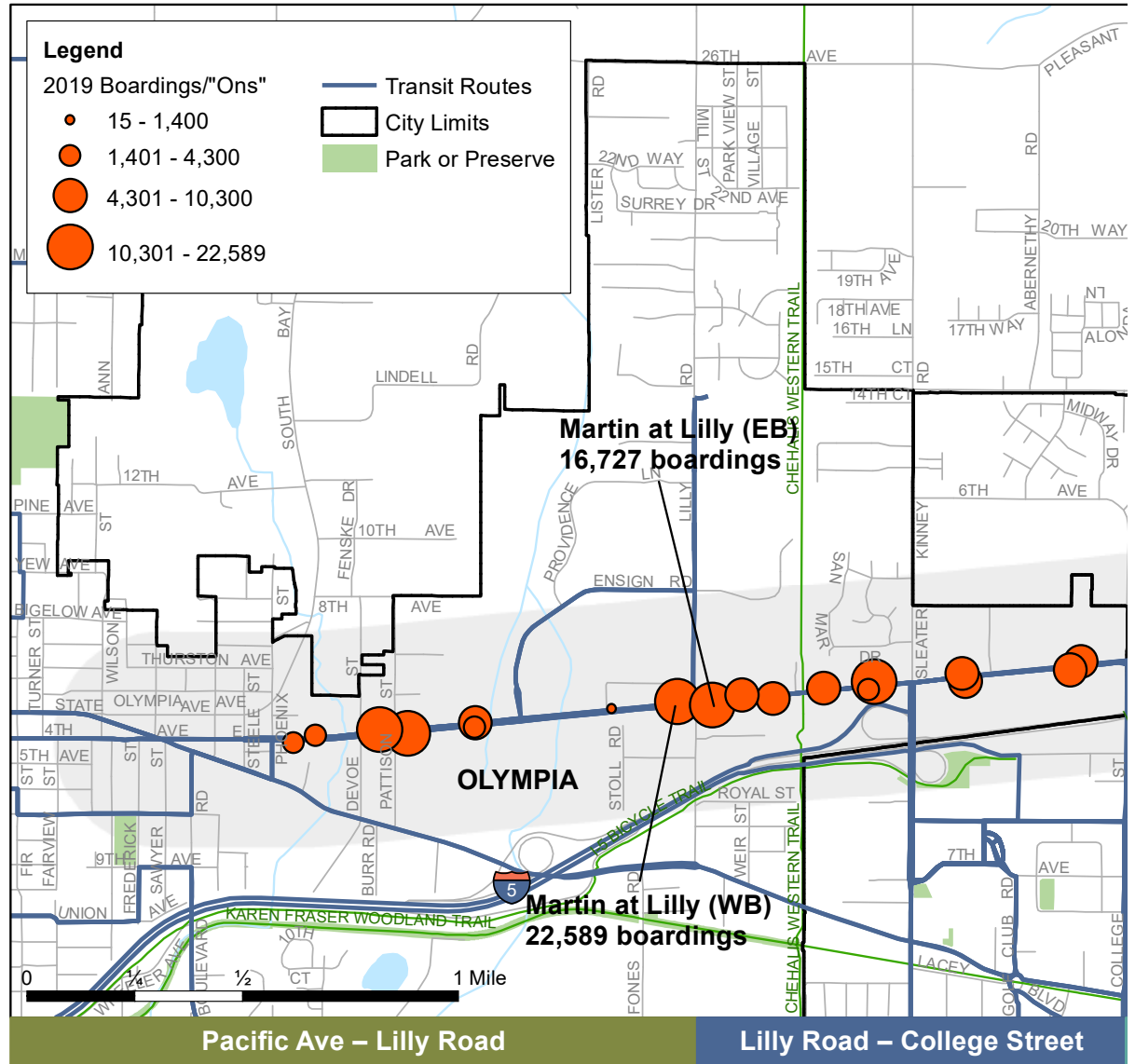
broader region, including express service to Tacoma (Routes 612/620—not operating in 2021, due to the reductions in service related to the COVID-19 pandemic), and connections via the downtown Olympia Transit Center to Grays Harbor and Mason counties. Collectively, the 45 Martin Way bus stops within this project’s study area generated 290,018 fixed-route passengers boarding (on) and 304,834 alighting (off) in 2019.

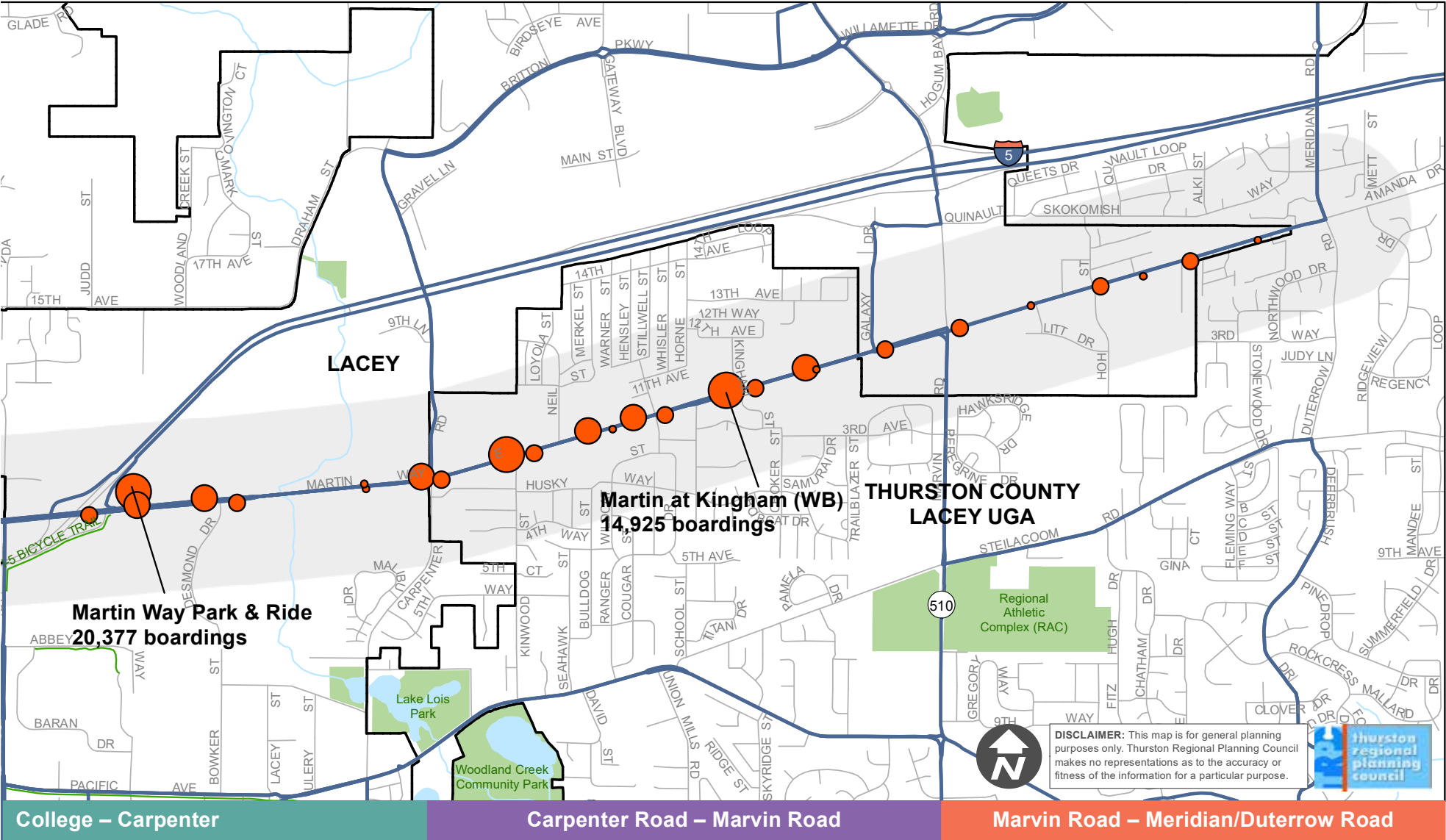


Performance Issues

Route 62A/B, which runs along the Martin Way Corridor between Lacey and the Olympia Transit Center has above average productivity, but below-average performance, with 16-17 percent of trips running late, according to Intercity Transit’s Long Range plan. The highest incidence of late running is associated with getting in and out of the Lacey Transit Center. These delays occur even though operators often deploy an extra vehicle during peak periods to shuttle passengers to and from the Lacey Transit Center, allowing buses to continue straight on Martin Way. The 62A experiences the greatest delays on inbound trips midday and PM peak, in the eastern portion of the route (Carpenter, Meridian, Marvin), while the 62B sees most laterunning on outbound trips, at Marvin Road and Pacific.

Map 20. Intercity Transit Ridership (getting on the bus), 2019.







Capital Investments

Intercity Transit is investing about \$85 million in the redevelopment of its base of operations at the southeast corner of Martin Way and Pattison Street. New buildings, which are under construction, will create an attractive, urban street edge along Martin Way. Completed roadway improvements along and adjacent to the base's Martin Way frontage include a new sidewalk, bike lane, bus shelter, and traffic signal with pedestrian crosswalks.

Over the next few years, Intercity Transit anticipates investing more than \$1.5 million in about a dozen new or improved bus stops (both standard fixed-route stops and enhanced bus rapid transit stops) along the Martin Way corridor. Such investments have the potential to serve adjacent nearby transit-oriented development.

Service Investments

IT provides 15-minute service on weekdays (headway) on the Martin Way corridor. Buses traveling the seven routes serve Martin Way stops between about 5AM and 12AM on weekdays (span of service); weekend service runs between about 7AM and 12AM. Traffic congestion, however, is forcing Intercity Transit to spend more time and money each year to provide the same “15-minute” level of service on the corridor.

For example, IT provided about 21,155 revenue service hours along the Corridor in 2018, an investment of about \$2.81 million. In 2019, IT increased its revenue service hours to about 32,949 and investment to \$4.38 million — an annual increase of about 56 percent.

The cost of running a trip on this important transportation corridor is also increasing. Intercity Transit buses ran 46,647 trips along the Corridor in 2018 — at a cost of about \$60 per trip. Intercity Transit buses ran 57,640 trips in 2019, at a cost of about \$76 per trip. Looked at another way, during a typical weekday workhour, there are more than a dozen buses traveling along the Martin Way corridor, carrying about 100 passengers collectively.



5.5 Walking and Bicycling

Pedestrians

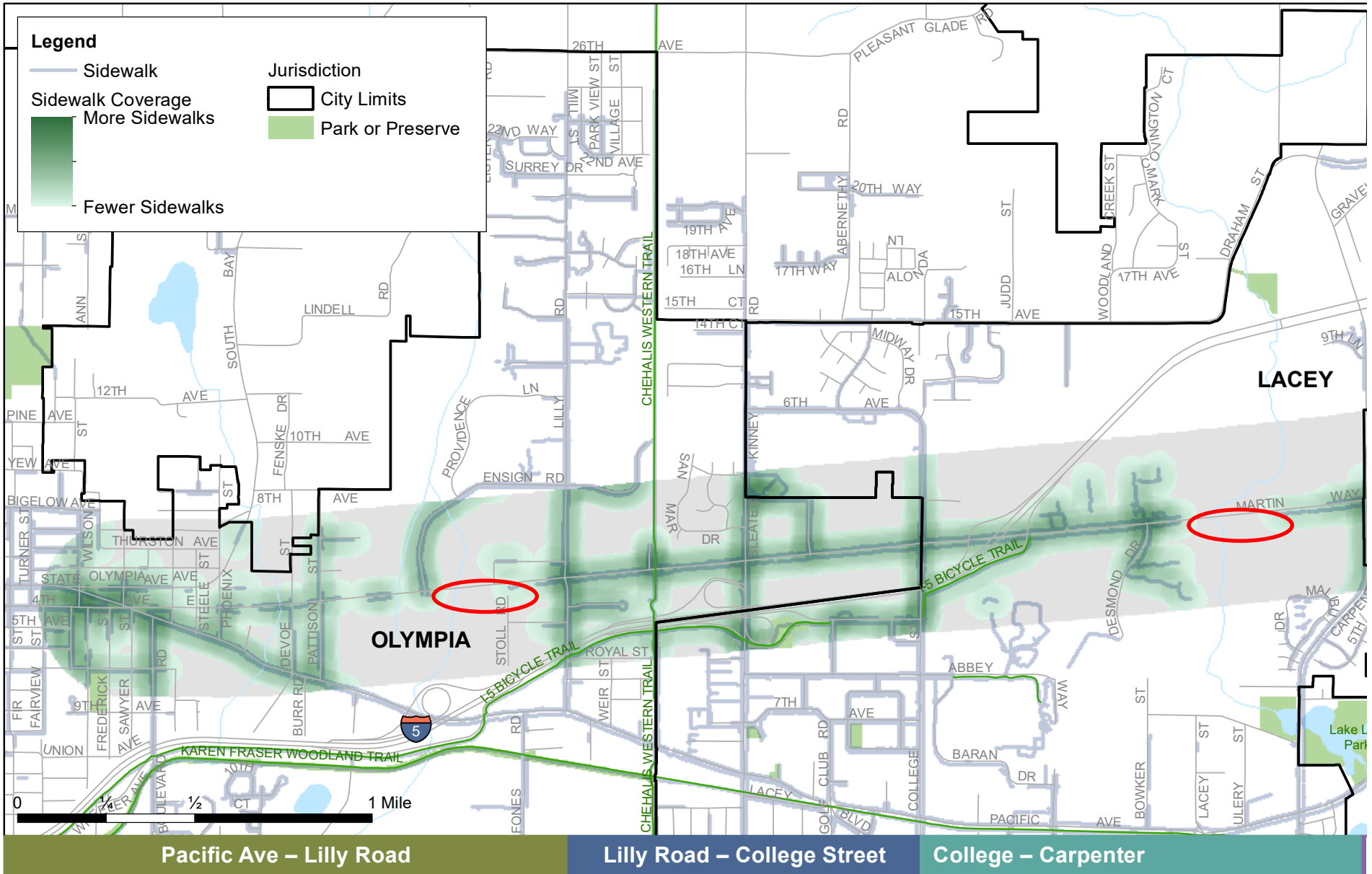
Safely using Martin Way as a pedestrian can pose a challenge due to high volumes, speeds, roadway width, and lack of facilities for walking. Significant sidewalk gaps exist along the corridor, with the two most severe gaps occurring in the Pacific Avenue to Lilly Road section of Olympia, near Woodard Creek, and in the College Street to Carpenter Road section of Lacey near Woodland Creek. These gaps are circled in the red in Map 21. The gaps correspond to areas of the corridor that have not been developed. Many streets connecting to Martin Way lack sidewalk infrastructure as well, including portions of the neighborhoods of Tanglewilde and Thompson Place, and the eastern edges of the corridor in the Lacey Urban Growth Area (UGA). Martin Way is wide and fast here, posing significant challenges to people attempting to cross the street to access destinations, including transit stops. [TRPC's State of the System report on sidewalks](#) shows that 81 percent of our region's urban corridors have sidewalks on both sides of

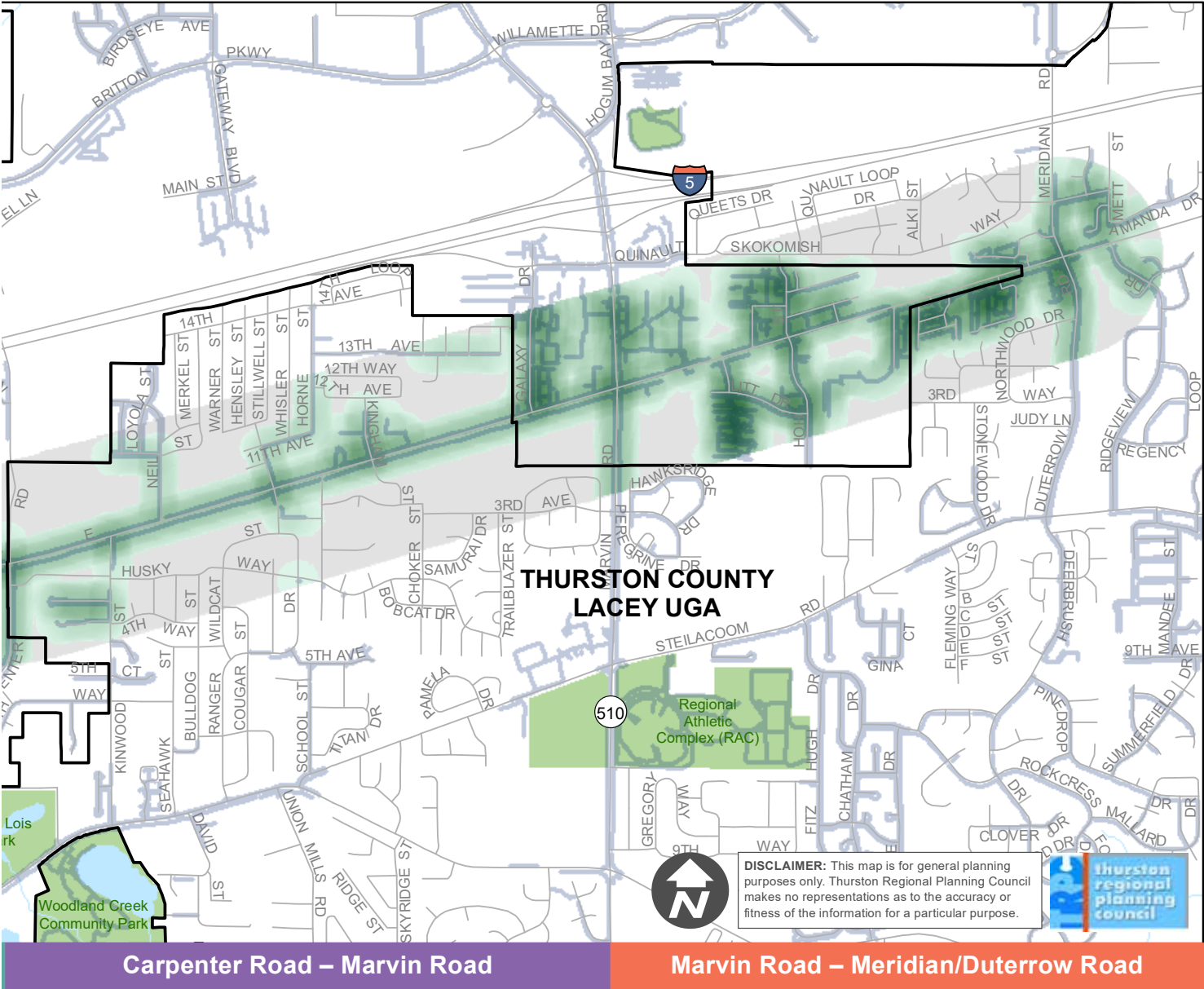
the street, with 8 percent having no sidewalk on either side. Addressing these sidewalk gaps and increasing safe crossing opportunities on Martin Way would provide a critical corridor linkage for pedestrians.

Bicyclists

Bicyclists are present on Martin Way, but cycling can feel intimidating and dangerous for all but the most experienced riders. Bicycle lanes exist on the street, but these five-foot lanes are immediately adjacent to travel lanes with heavy traffic volumes, that leave bicyclists feeling vulnerable and exposed. In response, cyclists often opt to travel on the more protected sidewalk, which puts them in conflict with pedestrians. The high number of driveway access points also creates many potential conflict points for cyclists.

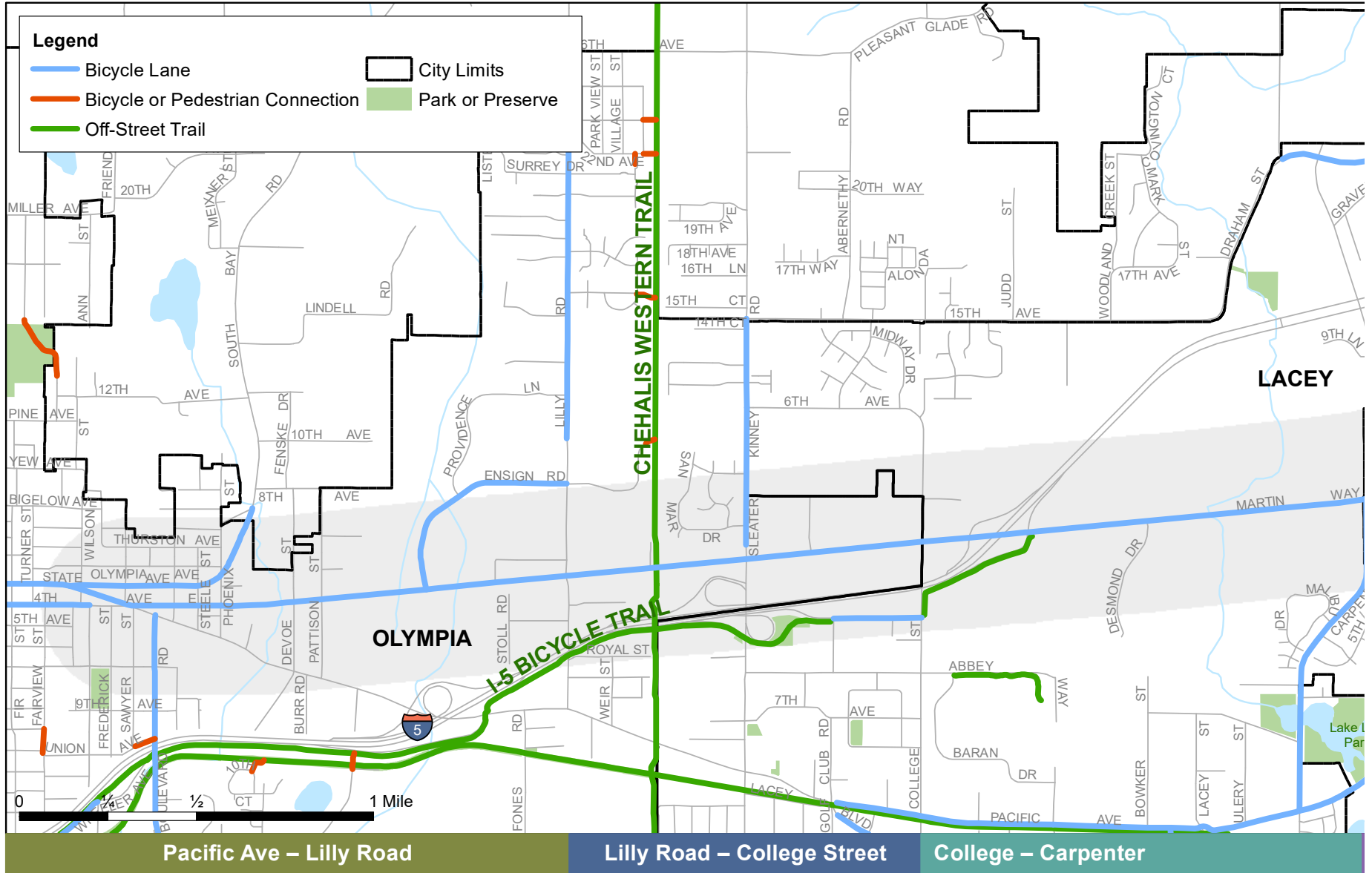
Map 21. Sidewalks in the Martin Way Corridor Study Area, 2020. The red circles denote significant gaps in the sidewalk network.

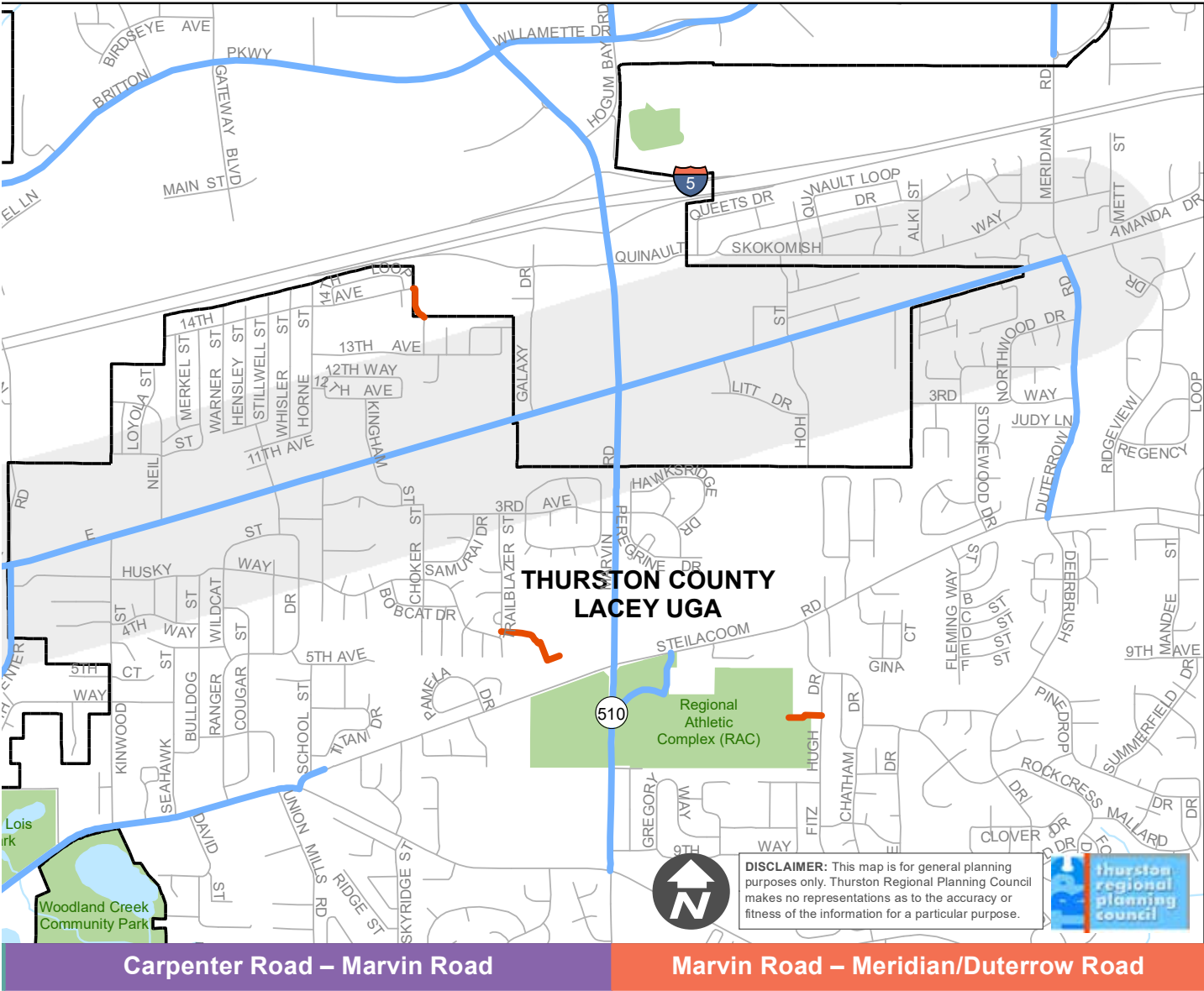




Chapter 5 Transportation Network

Map 22. Bicycle Lanes, Shared Use Trails, and Bicycle/Pedestrian Connections, 2020.





Trails and Neighborhood Connections

The Chehalis Western Trail, the Karen Fraser Woodland Trail, and the I-5 Bicycle Trail all interact with and serve users in the Martin Way corridor. These trails provide important connections for people to access schools, jobs, businesses and services. Neighborhood connections along the trail provide access to residents and people who are looking for an easy and direct way to get on the trail.

5.6 Safety

Martin Way's high traffic volumes, width, numerous driveways, and a lack of significant pedestrian and bicycle infrastructure can present safety challenges for all users.

Collision History

Between 2015 and 2019, there were an average of 324 collisions per year. Approximately 30 percent of collisions on the corridor in that period occurred in the College-Carpenter segment near the I-5 interchange. This segment saw the largest decrease in collisions between 2015 and 2019.

Figure 25. Bicycle lanes on Martin Way are immediately adjacent to travel lanes with heavy traffic volumes.



Table 16. Martin Way Collision History 2015-2019

Segment	Total # of Collisions 2015 to 2019	Total # Fatality/ Severe Injury	Total # Involving Bike/Ped	Number of Collisions				
				2015	2016	2017	2018	2019
Pacific Avenue - Lilly Road	156	4	7	33	44	27	26	26
Lilly Road - College Street	272	2	6	58	55	56	51	52
College Street - Carpenter Road	549	5	9	119	124	114	97	95
Carpenter Road - Marvin Road	493	1	16	92	119	107	85	90
Marvin Road - Meridian/Duterrow Road	150	4	2	28	29	29	27	37
TOTAL	1,620	16	40	330	371	333	286	300

Fatal and Serious Injuries

There were 16 serious/fatal collisions on Martin Way from 2015 to 2019. Four (4) of these involved pedestrians, with two (2) caused by a vehicle going straight hitting a pedestrian. Collisions involving pedestrians and bicyclists are the most common type of fatal or severe collision on Martin Way, representing almost half of all fatal or severe collisions on the corridor during this period. Nine of these occurred in the College-Carpenter segment.

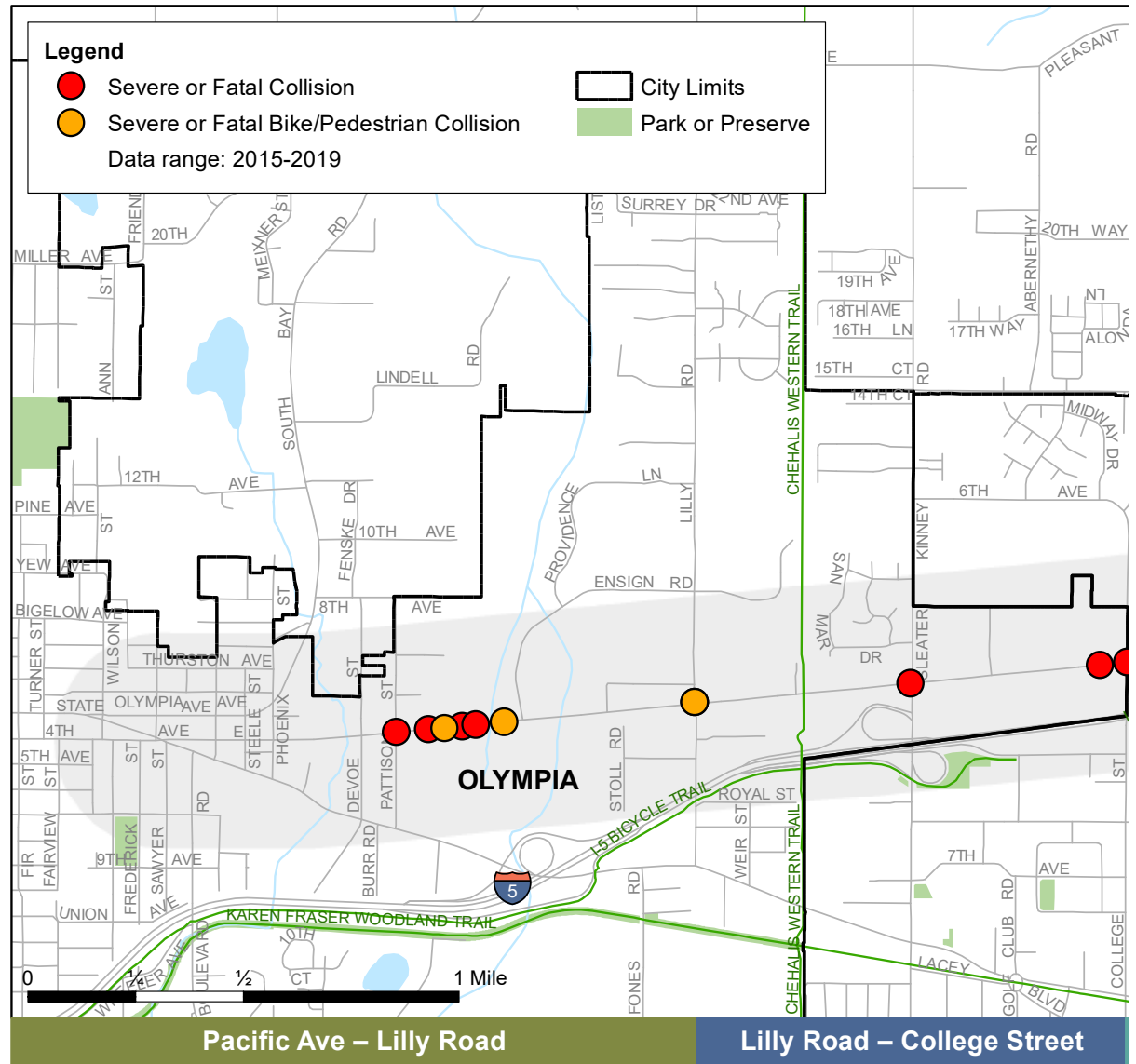
Collisions Involving Bicycles or Pedestrians

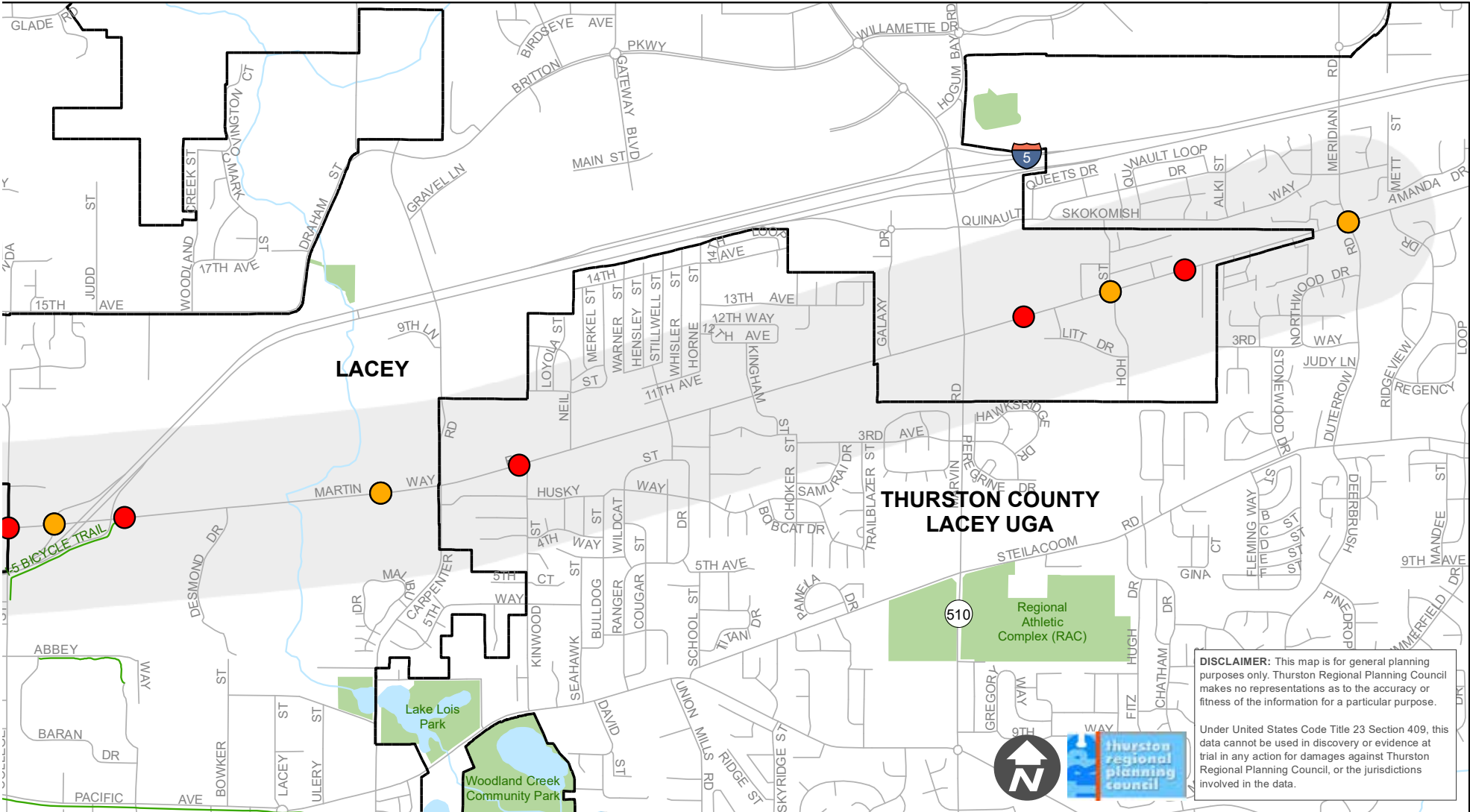
There were 20 collisions involving a pedestrian and 21 collisions involving a bicyclist on Martin Way from 2015 to 2019. Over 90 percent of these collisions occurred at an intersection or driveway. Vehicles turning right were the most common collision type with bicyclists, occurring 21 times and accounting for 49 percent of all collisions involving bicyclists on Martin Way.

Chapter 5 Transportation Network

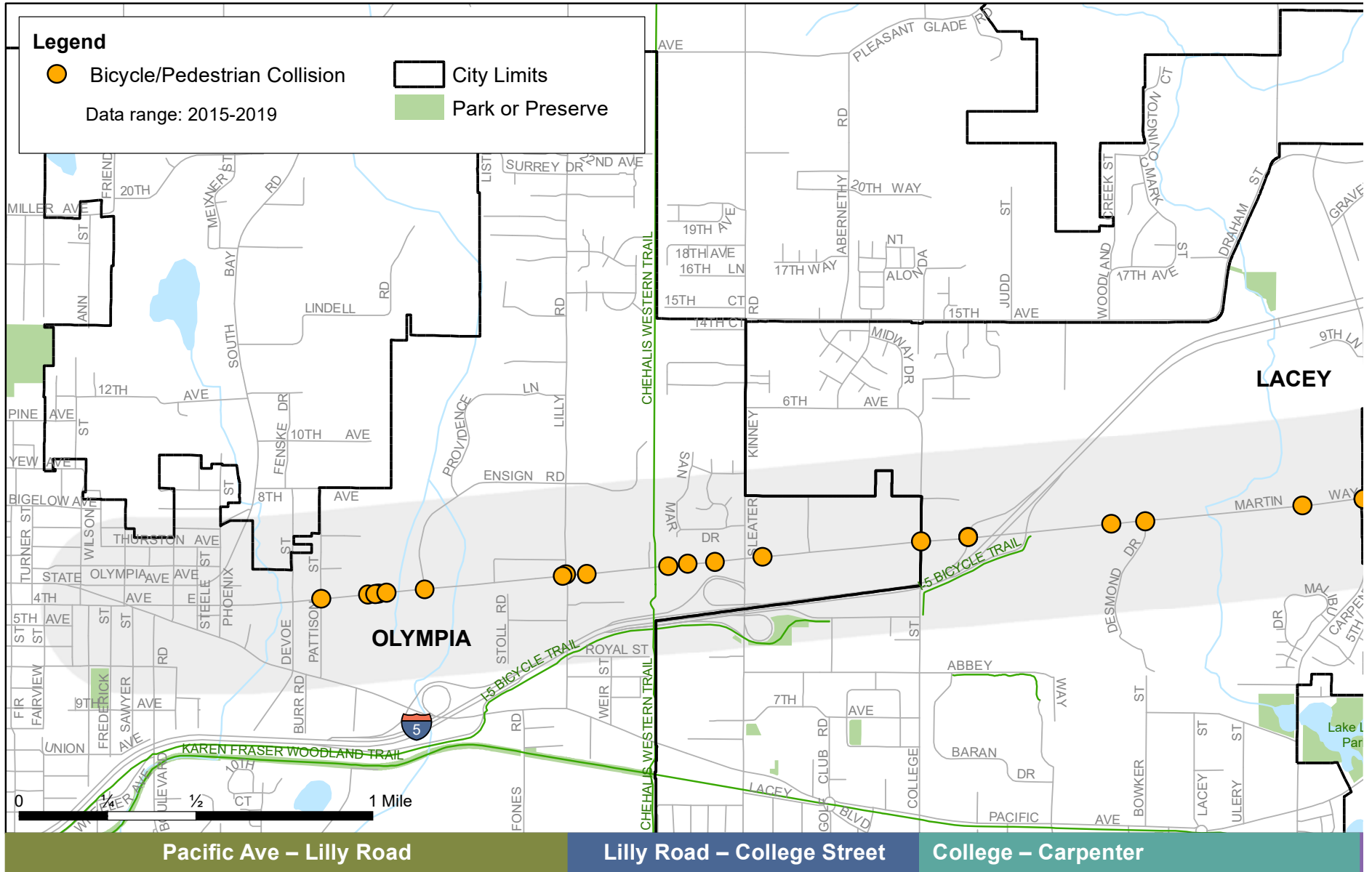
Collision types involving pedestrians were more variable, with vehicles going straight, making right or left turns accounting for roughly equal amounts of pedestrian-involved collisions on Martin Way. Over 70 percent of collisions involving pedestrians occurred within 250 feet of an Intercity Transit bus station. Thirteen (13) collisions involving a bicycle or pedestrian on Martin Way were severe or fatal, with most occurring in either the Carpenter-Marvin and Pacific-Lilly segments.

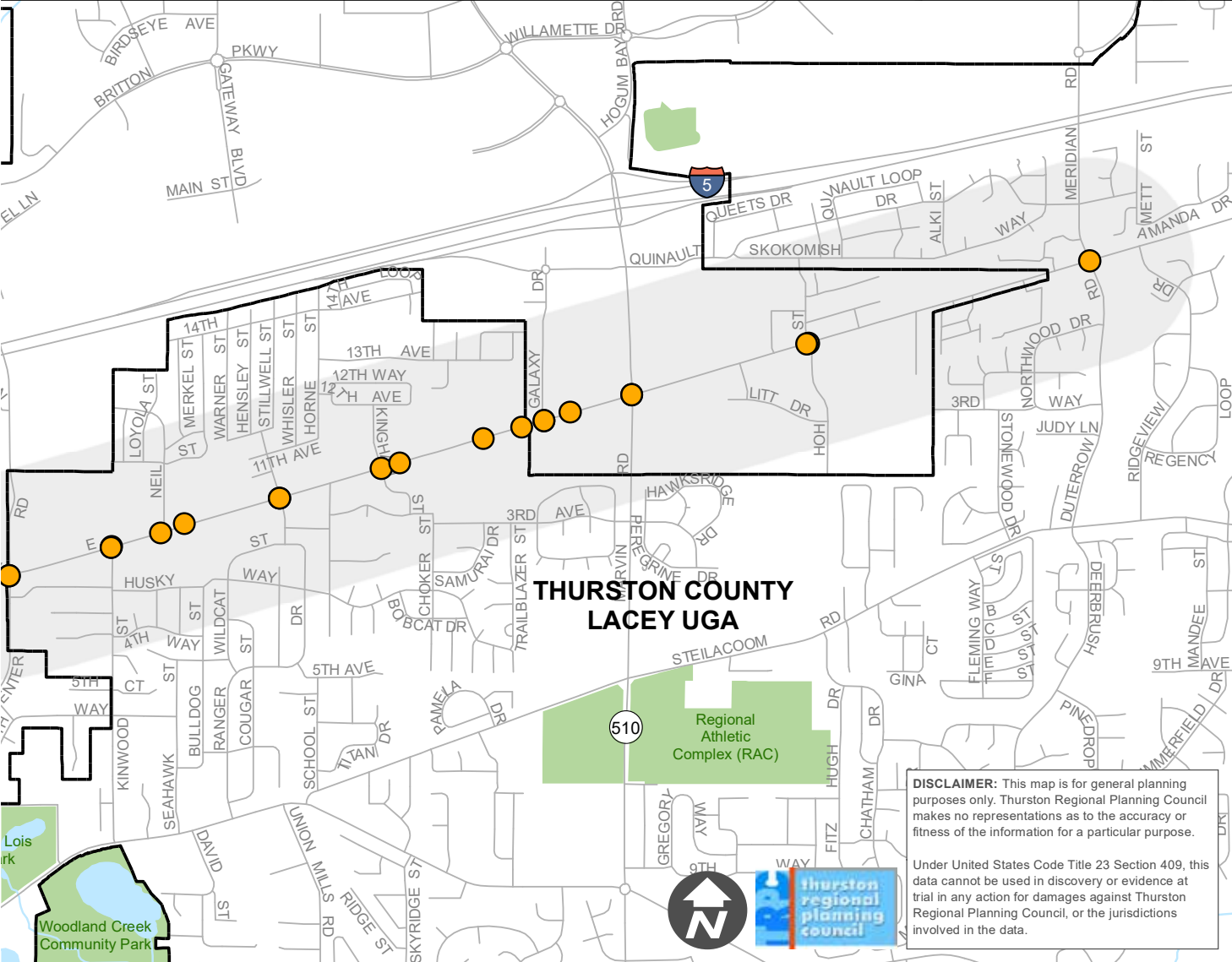
Map 23. Crashes involving fatalities and serious injuries along Martin Way, 2015-2019.





Map 24. Crashes involving bicyclists or pedestrians, 2015-2019.





Carpenter Road – Marvin Road

Marvin Road – Meridian/Duterrow Road

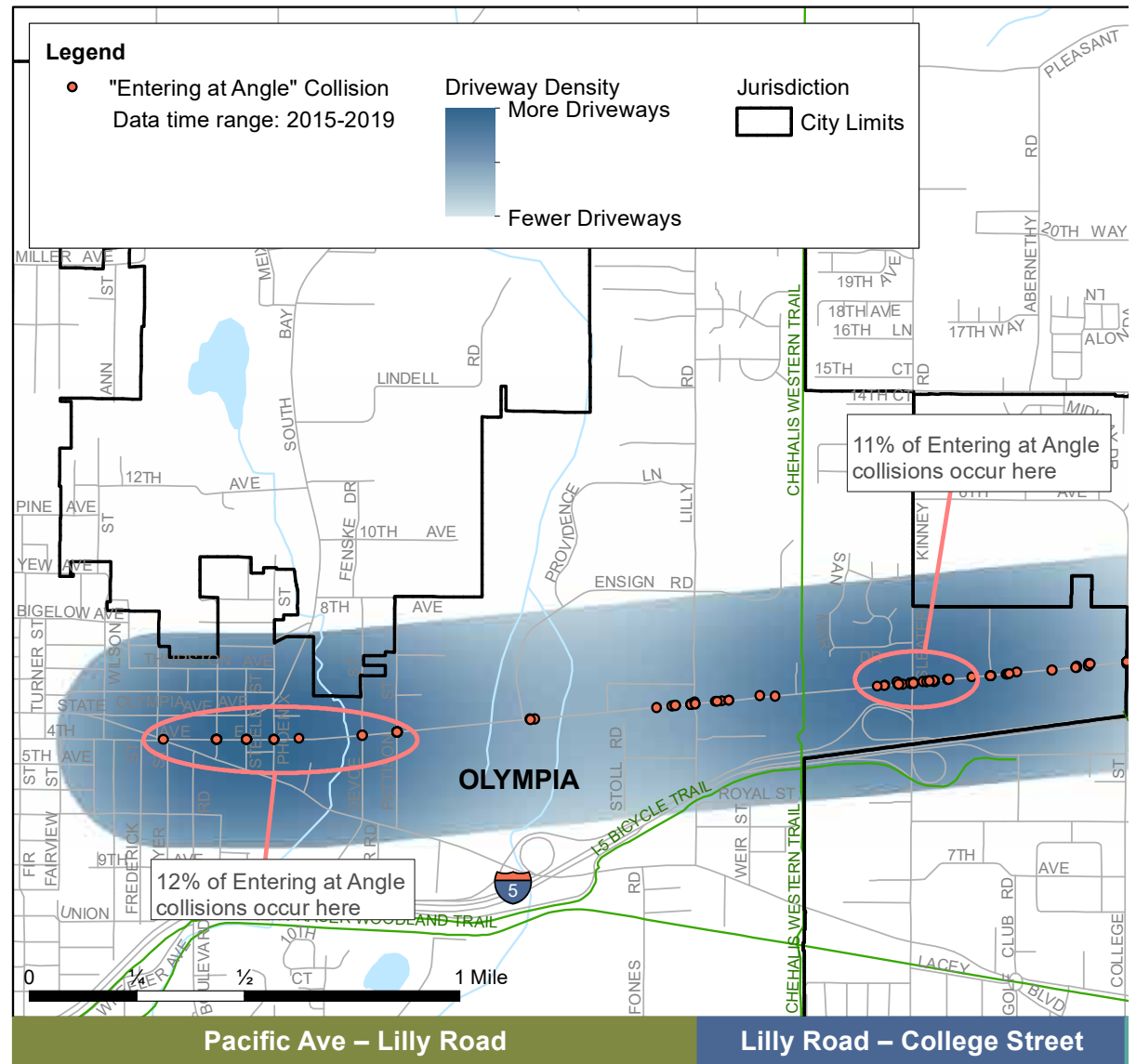
Entering at Angle Collisions

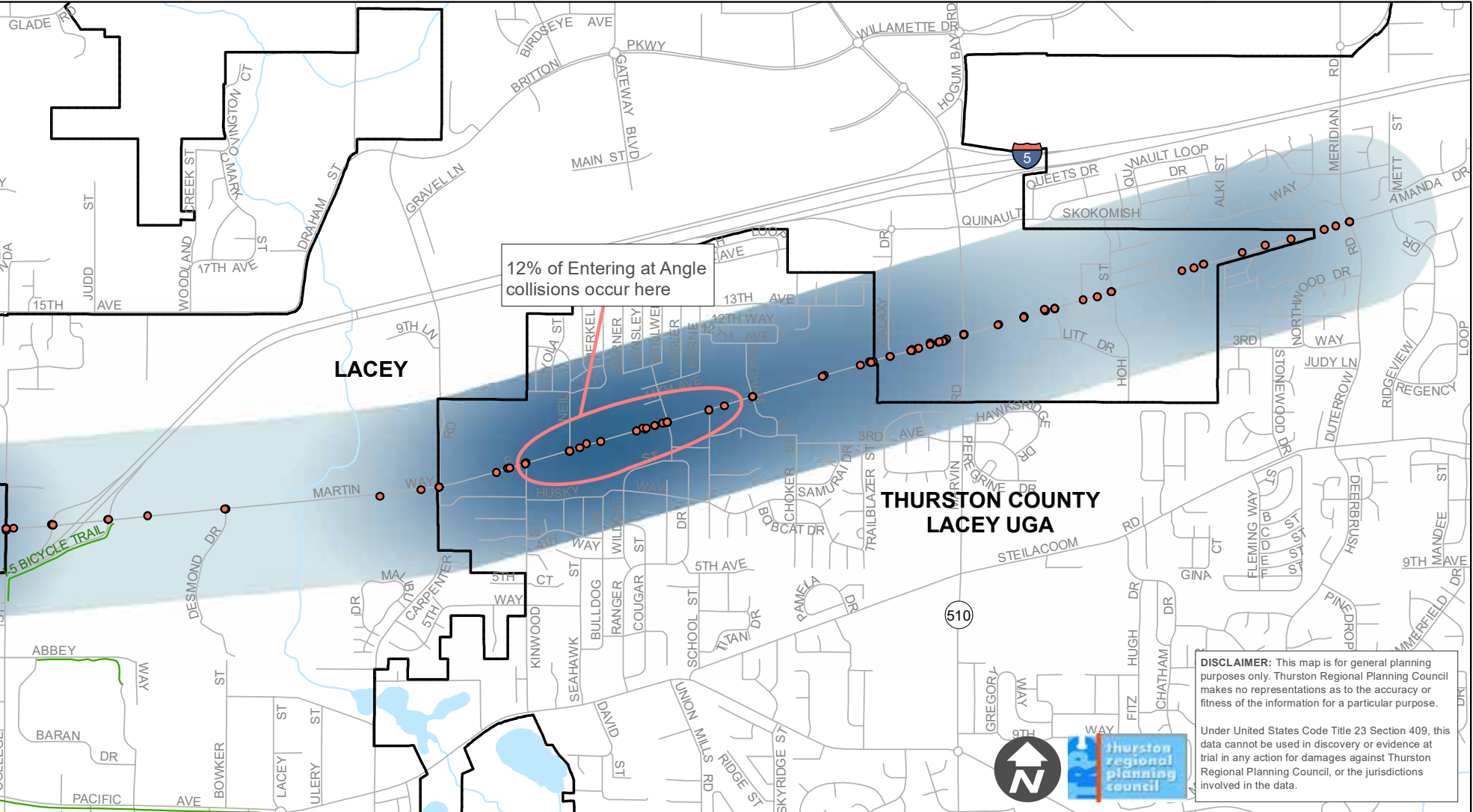
“Entering at angle” collisions describe a collision where two parties impact at an angle. Intersections and driveways create conflict points where this type of collision with a pedestrian, a bicyclist, or another vehicle is more likely to occur. There are three areas of the corridor where accidents involving vehicles turning onto or off of Martin Way occurred the most (Map 25):

1. in Segment 1 between Wilson and Pattison Street,
2. in Segment 2 near Sleater-Kinney, and
3. in Segment 4 between Kinwood and Kingham Street.

Together, these three areas comprise approximately 35 percent of all “Entering at Angle” collisions on Martin Way from 2015 to 2019.

Map 25. “Entering at Angle” crashes, 2015-2019.





College – Carpenter

Carpenter Road – Marvin Road

Marvin Road – Meridian/Duterrow Road

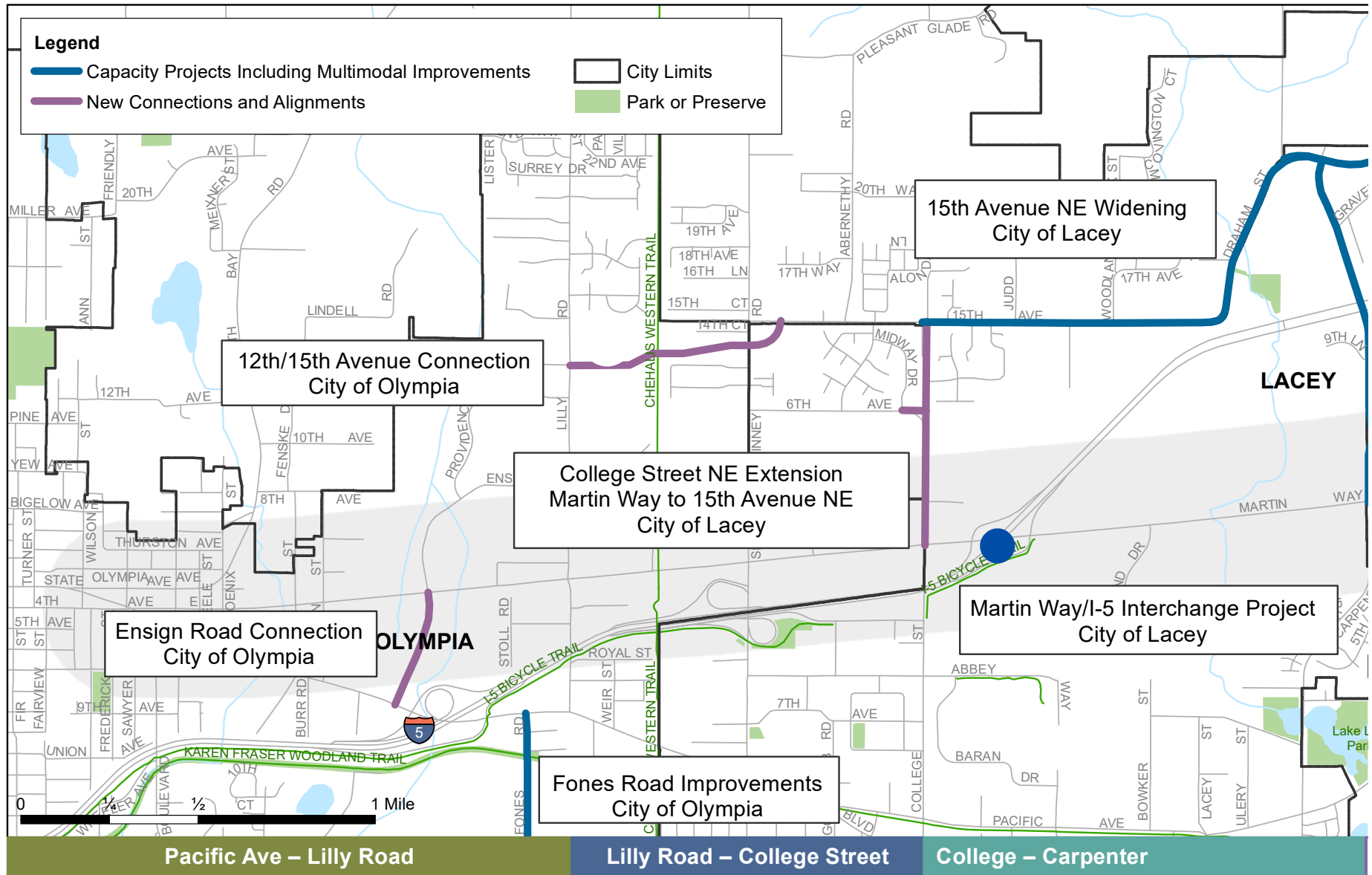
5.7 Planned Transportation Projects

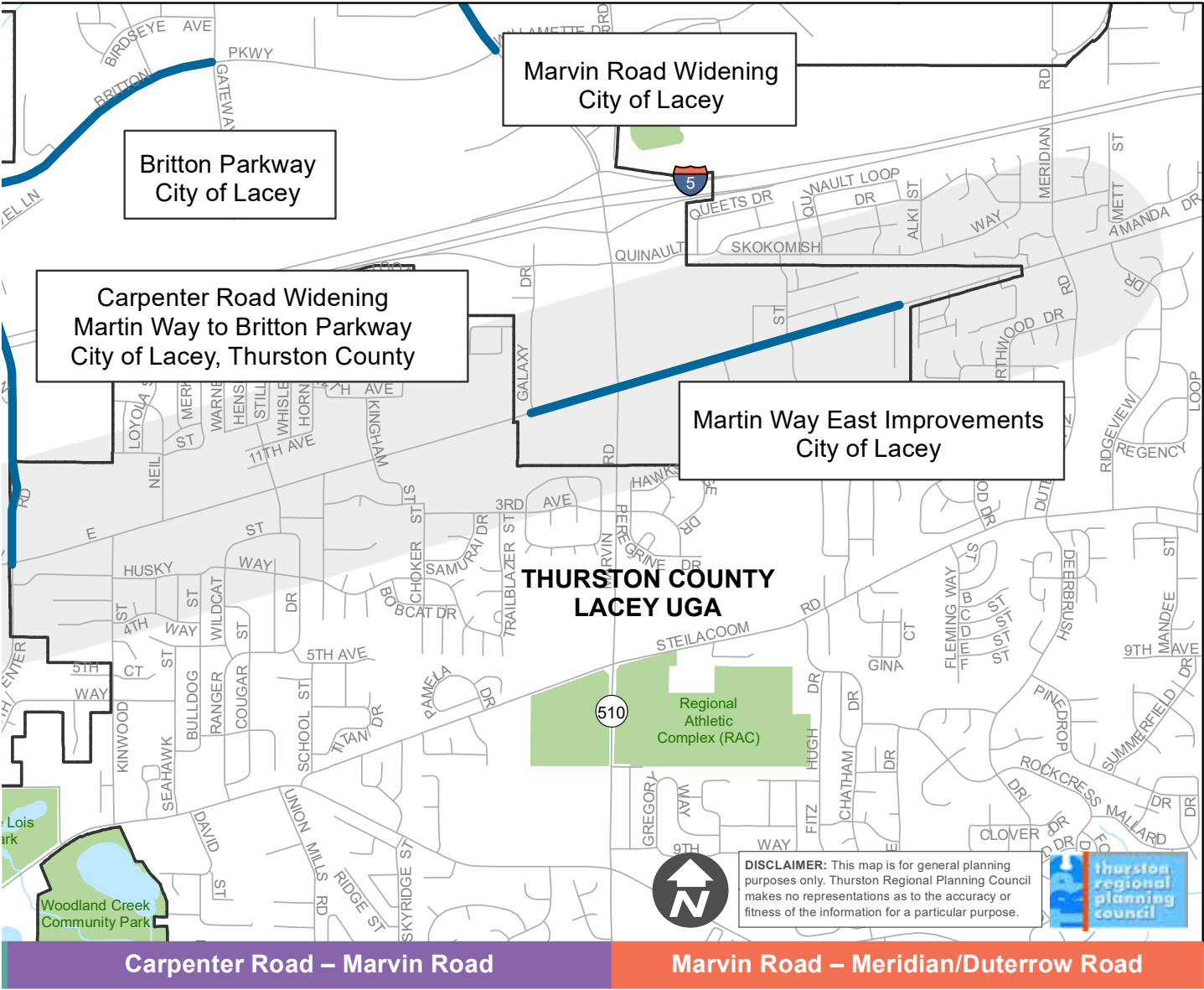
The Regional Transportation Plan (RTP) identifies several transportation projects anticipated to be completed over the next 25 years that will impact travel patterns on Martin Way. These projects are at various stages of planning and implementation. Because they impact travel on a region-wide basis, they are considered “regionally significant.” These projects include:

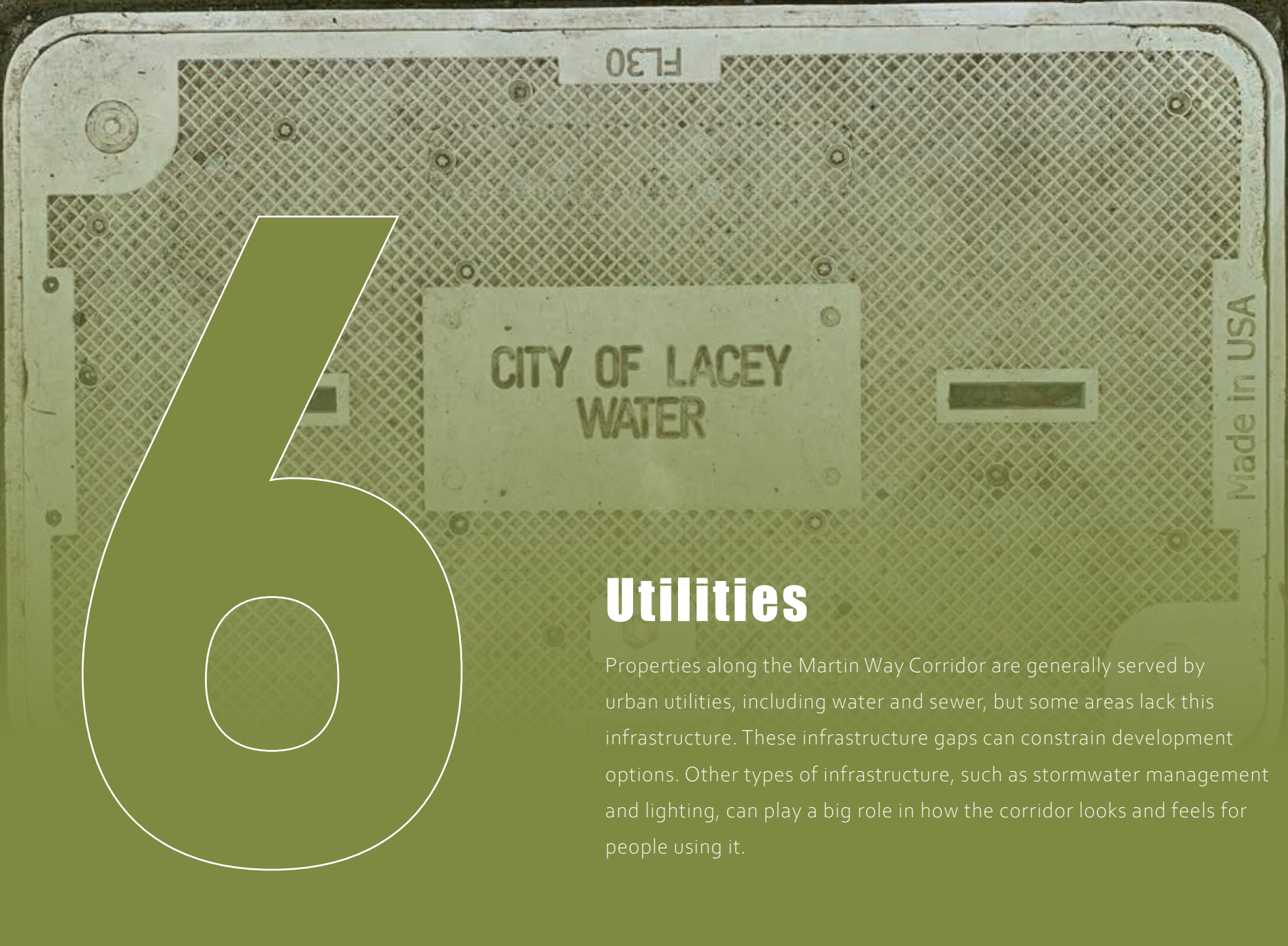
- Ensign Road Connection (City of Olympia). Connects Martin Way and Pacific Avenue just east of the Pacific Avenue/I-5 Interchange. This is anticipated to provide improved mobility for the Fones Road/Pacific Avenue intersection, Pacific Avenue/Lilly Road intersection, and Lilly Road/Martin Way intersection.
- Intercity Transit Bus Rapid Transit Demonstration Project on Martin Way.
- 12th/15th Avenue Connection (City of Olympia). Connects Lilly Road and Sleater Kinney Road north of Martin Way and I-5.
- College Street NE Extension (City of Lacey). Connects Martin Way to 15th Avenue NE by extending College Street north from 6th Avenue NE. Will include reconfigured travel lanes, new bicycle lanes, and new sidewalks.
- Martin Way/I-5 Interchange (City of Lacey). Major reconstruction of the Martin Way interchange to a partial cloverleaf interchange. Requires full involvement from WSDOT before this can be implemented.

- Carpenter Road Widening (City of Lacey, Thurston County). Widen Carpenter Road to 4 or 5 lanes with medians, bicycle lanes, planter strips and sidewalks. Will require a wider bridge over I-5.
- Martin Way East Improvements (City of Lacey). Add access management, bike lanes, and sidewalks between Galaxy Drive and River Ridge Drive.
- 15th Avenue NE Widening (City of Lacey). Widen 15th Avenue from Carpenter Road to Sleater-Kinney to a 4/5 lane arterial with median, bicycle lanes, planter strips, and sidewalks. This project will be coordinated with a future extension to Lilly Road.

Map 26. Planned Martin Way Corridor Transportation Projects in Regional Transportation Plan, 2020-2045.







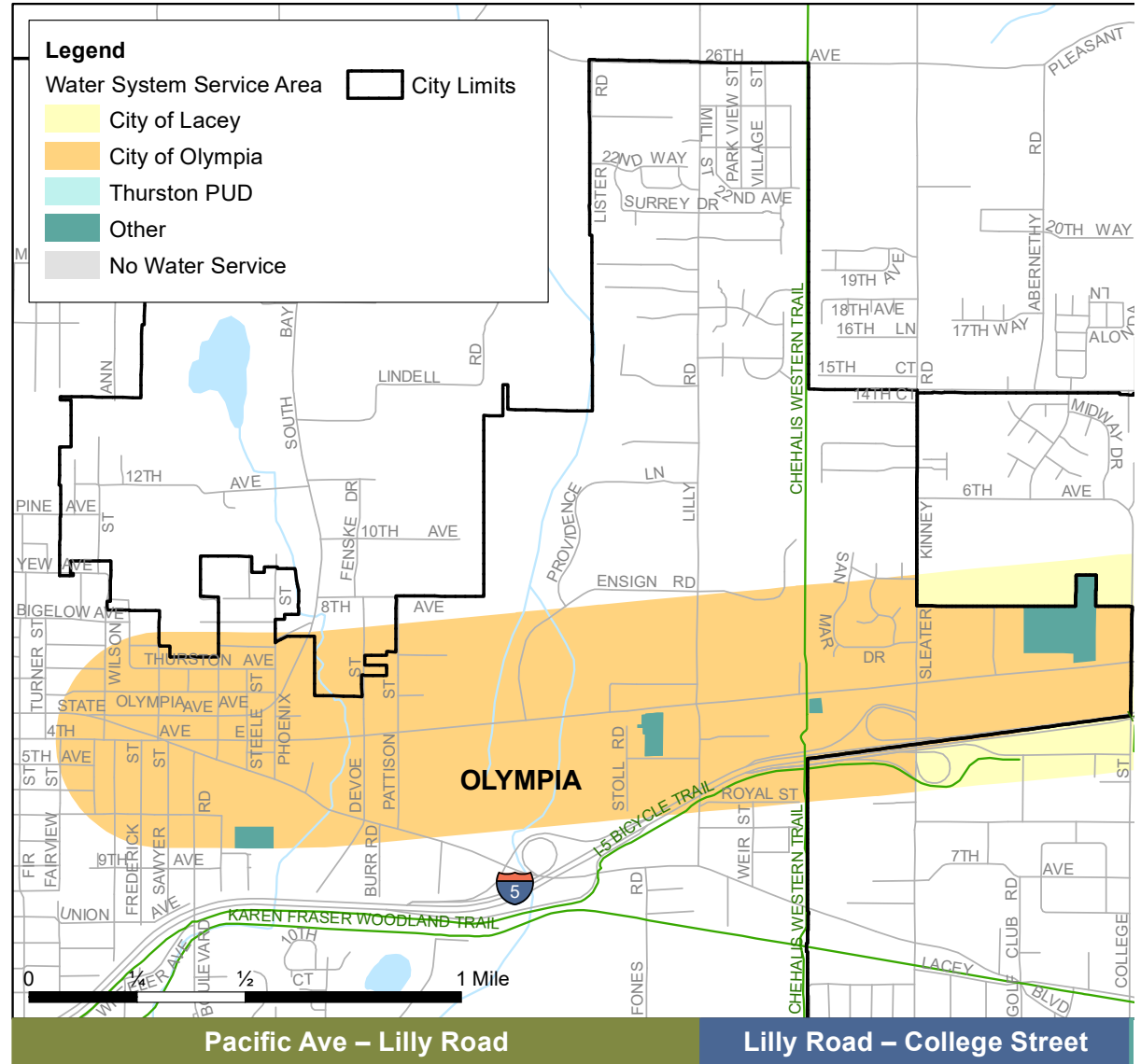
Utilities

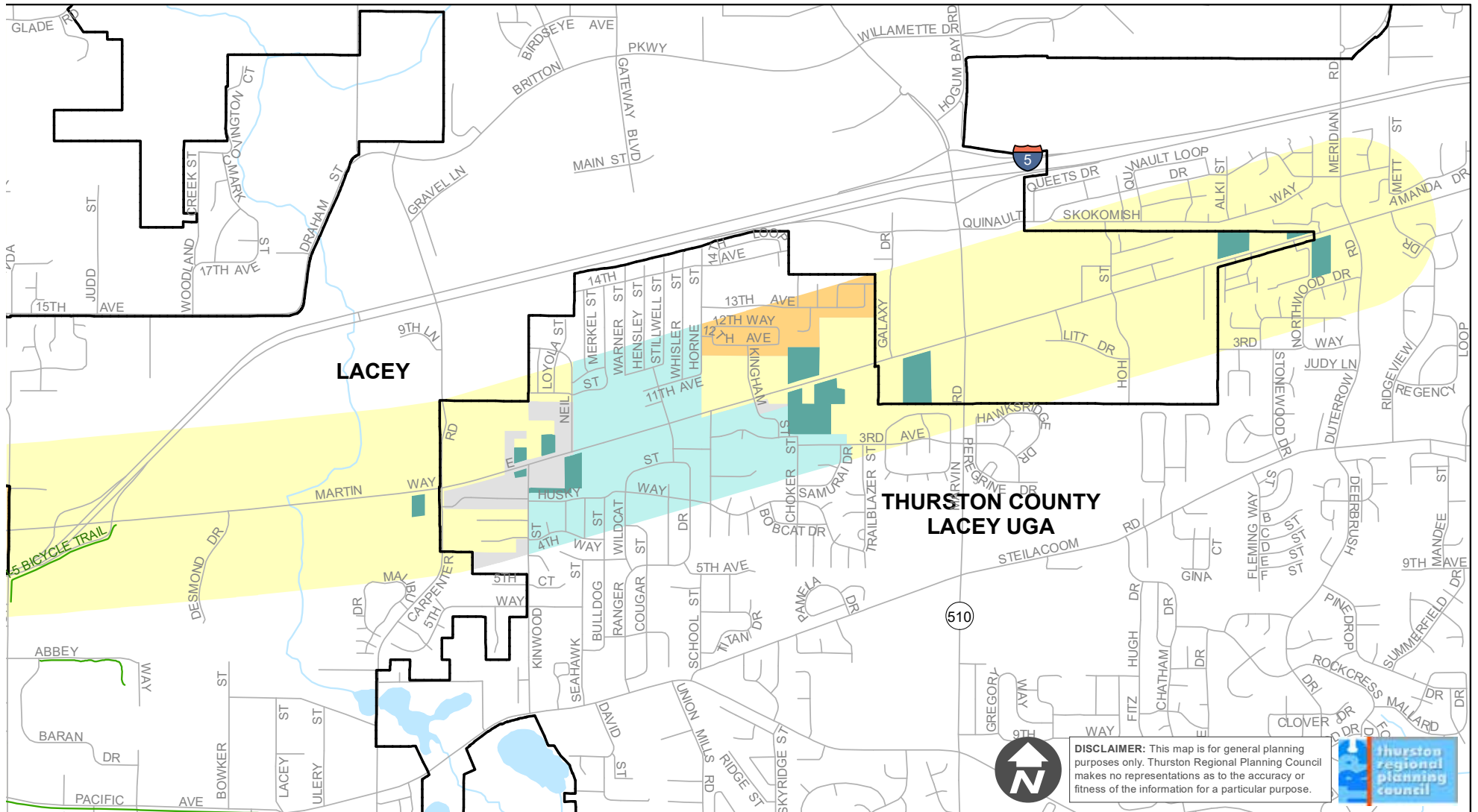
Properties along the Martin Way Corridor are generally served by urban utilities, including water and sewer, but some areas lack this infrastructure. These infrastructure gaps can constrain development options. Other types of infrastructure, such as stormwater management and lighting, can play a big role in how the corridor looks and feels for people using it.

6.1 Drinking Water

Water service along Martin Way is provided by either the City of Olympia, the City of Lacey, or the Thurston Public Utility District (PUD). There are also a small number of parcels using wells or other water service.

Map 27. Water service areas in the Martin Way Corridor.





College – Carpenter Carpenter Road – Marvin Road Marvin Road – Meridian/Duterrow Road



6.2 Stormwater

Each of the three jurisdictions have programs in place to manage stormwater to limit flooding, erosion and water pollution. These include separate design and engineering manuals, with similar but sometimes different requirements for new development. Runoff from roadways and rights of way is also handled differently in different sections of the corridor, with a greater reliance on low maintenance swales in areas managed by Thurston County, and more engineered solutions in incorporated areas of Lacey. These different standards contribute to a lack of consistency across the corridor.

Many areas of older development along the corridor (prior to 1990) lack the stormwater infrastructure that is typical of new development. While these improvements help protect local streams, groundwater supply, and ecosystems, their high cost can be a barrier to redevelopment.

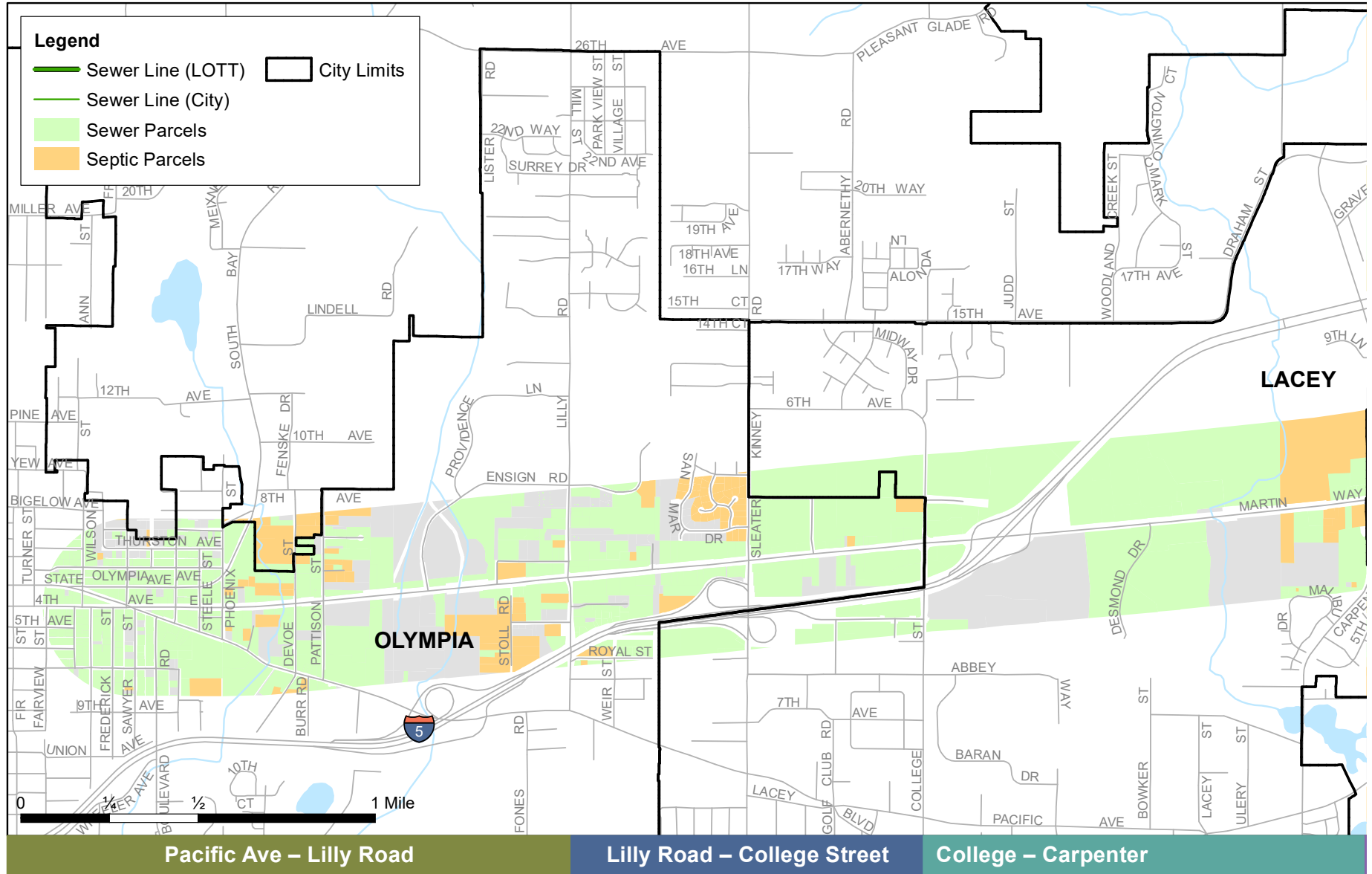
6.3 Wastewater

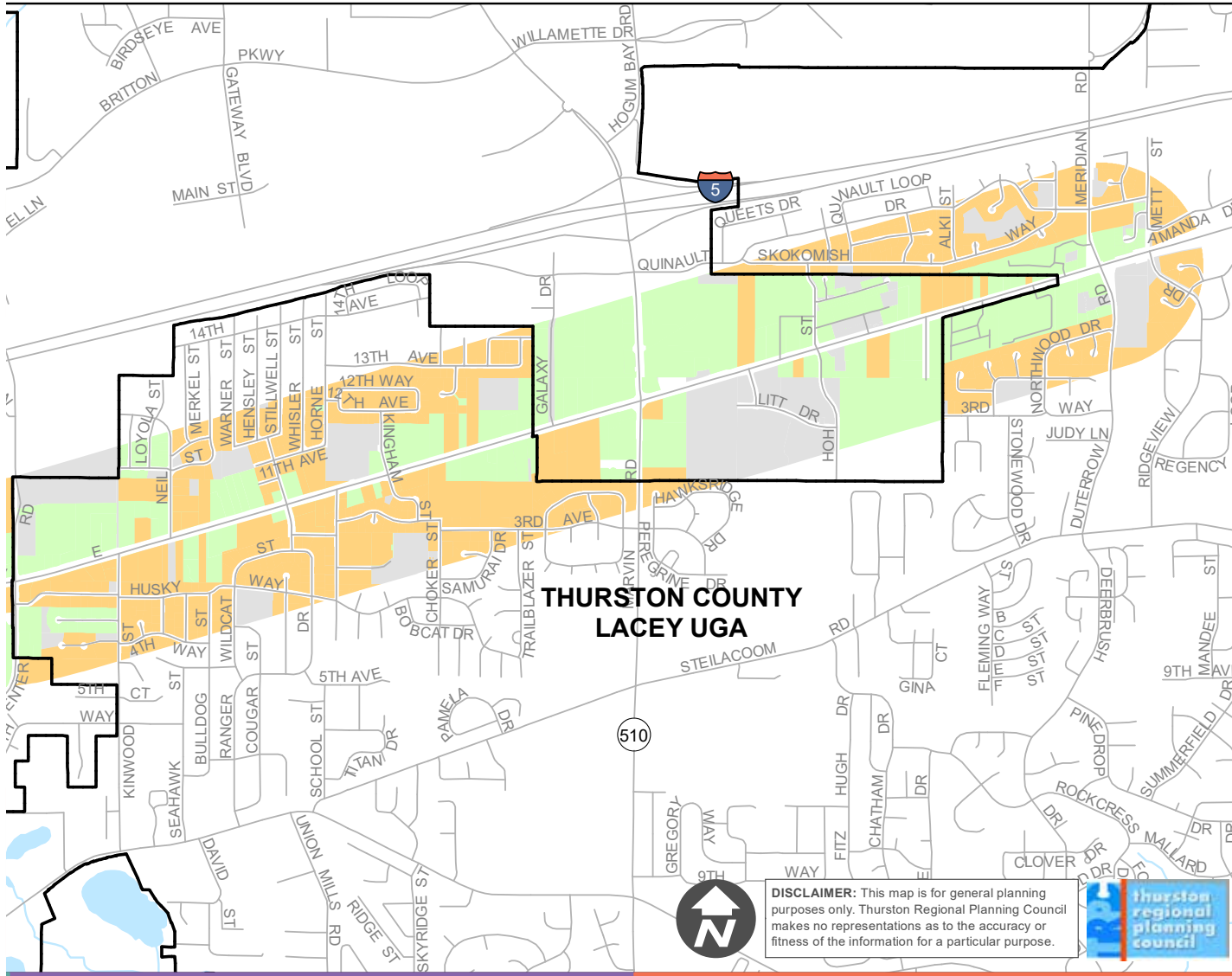
Presence of sewer infrastructure varies along Martin Way, with properties throughout the corridor that continue to rely on onsite septic systems for wastewater treatment. New homes and businesses are required to connect to the municipal sewer system if within 200 feet of an existing sewer main, but many areas of Martin Way developed before the current network was available. Two areas with high concentrations of septic systems include the neighborhoods of Tanglewilde and Thompson Place and the eastern edge of the corridor near Martin

and Duterrow. Both areas are in the Lacey Urban Growth Area. Lack of existing sewer infrastructure in these locations limits their potential for redevelopment at higher densities more consistent with the land use vision for the corridor.

LOTT operates a Reclaimed Water Plant on Martin Way near Carpenter Road. The facility treats and produces up to 1.5 million gallons of Class A Reclaimed Water a day, which can be used for irrigation, cleaning, and groundwater replenishment.

Map 28. Parcels served by sewer and septic in the Martin Way Corridor.





Carpenter Road – Marvin Road

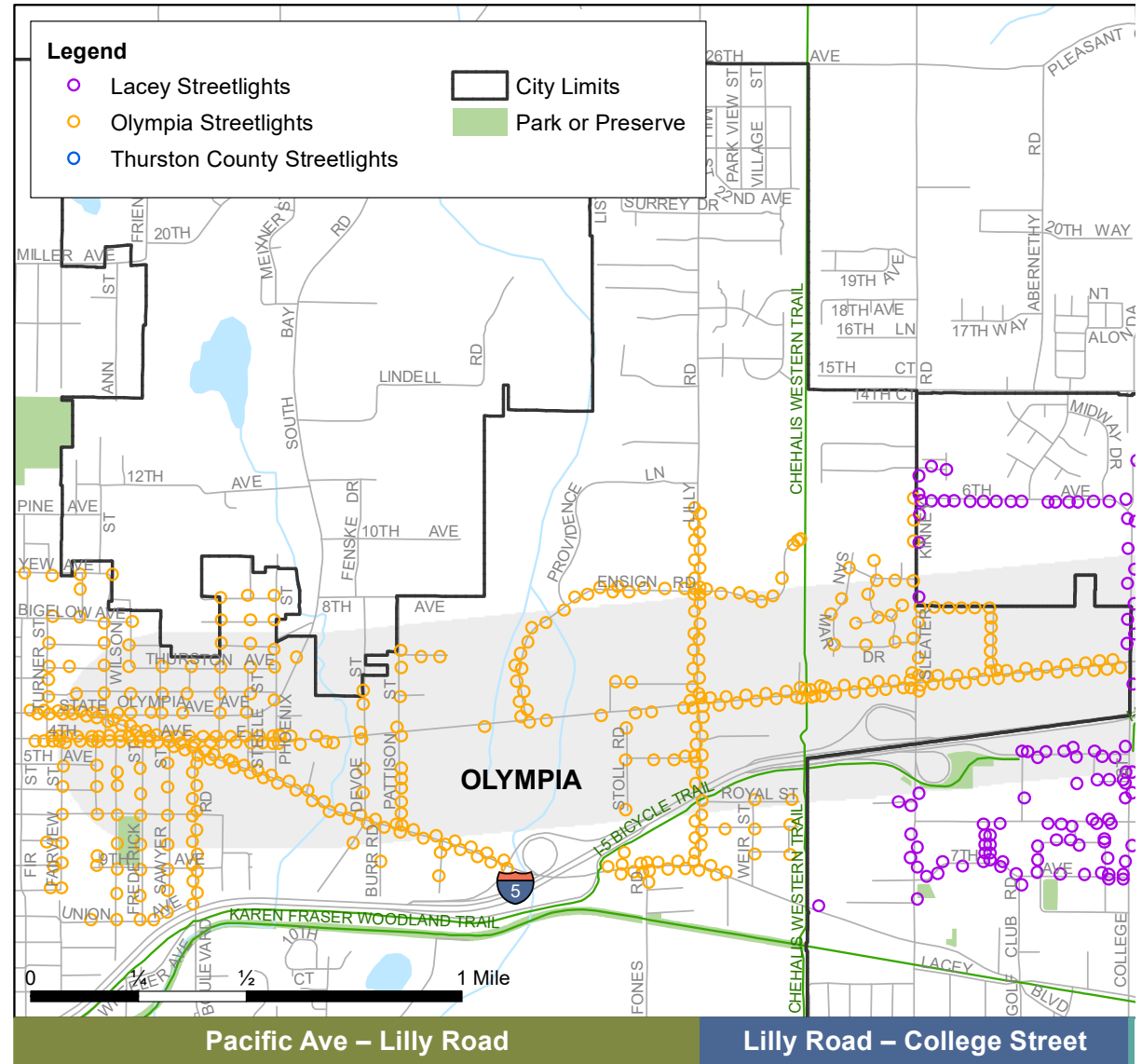
Marvin Road – Meridian/Duterrow Road

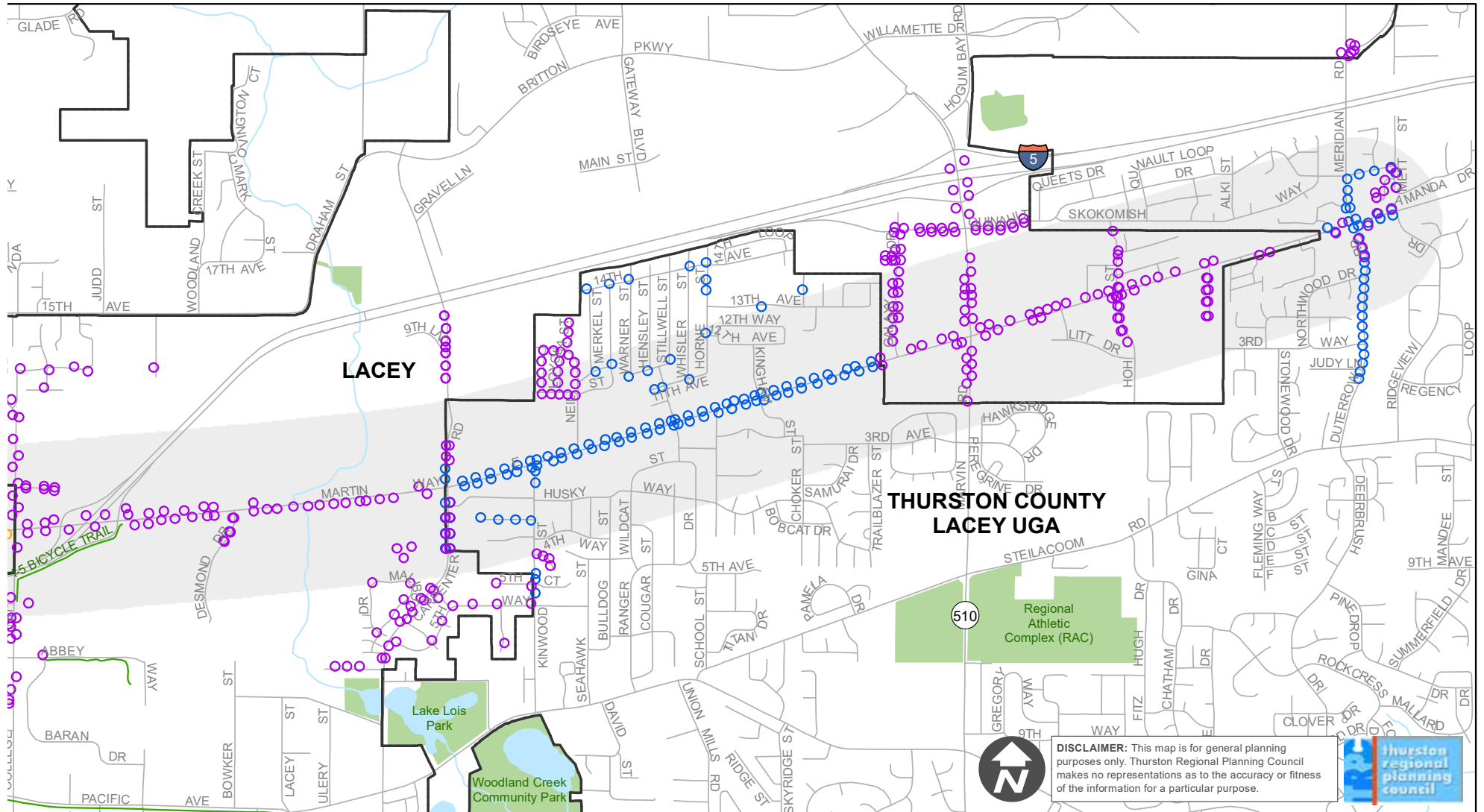
6.4 Lighting

Lighting along Martin Way is relatively consistent, but has some gaps, which impacts the perception of safety of the corridor for all users.

The area between Pattison and Lilly Road in Olympia lacks streetlights, and Martin Way over Woodland Creek in Lacey only has lights on the south side of the street. Many streets immediately adjacent to Martin Way lack any lighting infrastructure. In addition to transportation safety, lighting can increase a person’s sense of personal safety.

Map 29. Street lighting in the Martin Way Corridor.





College – Carpenter

Carpenter Road – Marvin Road

Marvin Road – Meridian/Duterrrow Road



Community Perspectives

Martin Way is a communitywide asset, connecting tens of thousands of people to a variety of destinations every day. This section summarizes community input on the corridor's current conditions and future development.

7.1 Residential Survey

TRPC administered a survey of residents who live on or around the Martin Way Corridor during Fall 2020. The survey was mailed directly to 8,612 households in September 2020. Residents were able to reply by sending back the paper survey

or by taking an online version of the survey. The online version of the survey was also promoted to other users of the corridor through social media, and through project partners. A total of 1,990 surveys were returned, nearly half from corridor residents. The full survey report is included as Appendix 1.

Who responded to the survey?

Race/Ethnicity[†]...
nearly 9/10 were white

Live...
nearly 1/2 were corridor residents

Household Income...
nearly 3/4 earned \$50,000 or more annually

Age*...
1/4 were 25-39, 1/3 were 40-54, & 1/3 were 55-69

Gender...
nearly 3/5 were women

Race/Ethnicity[†]...
 3% American Indian & Alaska Native
 6% Asian
 4% Black or African American
 4% Hispanic or Latino
 2% Native Hawaiian & Pacific Islander
 85% White
 4% Other

Live...
 48% are corridor residents
 52% live elsewhere

Household Income[§]...
 9% earned less than \$24,999
 14% earned \$25,000 \$49,000
 73% earned \$50,000 or more
 5% didn't know

Age*...
 1% 24 or younger
 25% 25-39
 35% 40-54
 31% 55-69
 7% 70 or older

Gender...
 59% female
 37% male
 1% other

[†] Respondents could choose more than one answer.

[§] A typo on the online and paper survey did not include those that make between \$49,001 and \$49,999.

* Reflects only responses from the online survey; the question regarding a respondents' age was unintentionally left off the paper version of the survey.

Corridor Residents

More than 50 percent of resident respondents have lived in their current location on the Martin Way corridor for at least five years, and more than 70 percent of resident respondents were homeowners. For residents, the easy and convenient access Martin Way provides to I-5, small businesses and big chain stores, as well as recreation and services was what they liked most about living on or near the corridor.

Residents were also interested in improving traffic signal timing, improving multimodal infrastructure including continuous sidewalks, trails, and bike lanes. The impact of encampments where those experiencing homelessness live was also of concern for residents.

Figure 26. What current residents like most about Martin Way.

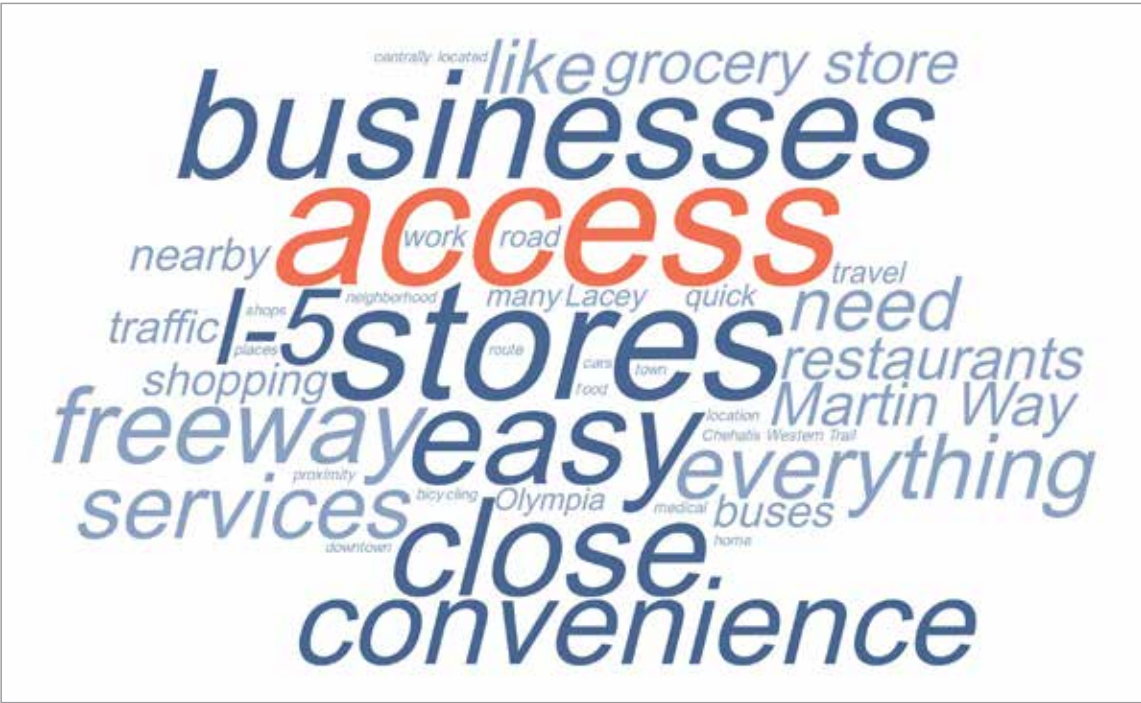


Table 17. Top 5 concerns about Martin Way for residents, people of color, and low-income households.

Top 5 Concerns	All Residents	People of Color	Household Income Less than \$35,000
1	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter
2	Sense of safety	Sense of safety	Level of crime
3	Level of crime	Level of crime	Sense of safety
4	Availability of trails	Ease of biking	Availability of crosswalks
5	Ease of biking	Community feel/neighborliness	Community feel/neighborliness

The availability of parking, frequency of bus service, ease of walking to bus stops, and location of bus stops were consistently the aspects of Martin Way residents were most satisfied with, regardless of the respondent's household income or race and ethnicity.

In general, people of color and those with an income less than \$35,000 reported higher levels of satisfaction with the 14 aspects of the Martin Way corridor than those with higher incomes and those who were non-Hispanic whites.

Mode of Travel

Both residents and nonresidents were asked about how they travel on the Martin Way corridor. Overall, residents were slightly less likely to ride the bus or bicycle than nonresidents. Driving a private vehicle was by far the most common method of transportation along the Martin Way corridor, followed by being a passenger in a private car. For residents, walking was the third most common method of travel while nonresidents were more likely to ride the bus.

Chapter 7 Community Perspectives

Regarding level of satisfaction for the 14 aspects of the Martin Way Corridor, responses were reviewed to better understand differences based on how people travel. Responses from frequent transit users, frequent walkers and mobility device users, and frequent bicyclists were reviewed to see if there were any differences in their answers. For the purposes of this report, “frequent” means the person utilized a mode daily or one to two times a week.

As with responses from corridor residents, the amount of trash or litter, the respondent’s sense of safety, and the level of crime on the corridor were consistently in the top five concerns regardless of how a respondent travels. Transit users were also concerned with the availability of crosswalks and how easy it is to bike the corridor. Walkers and mobility device users were concerned with the availability of trails and the ease of biking. Finally, bicyclists were also concerned with the availability of trails and the ease of walking on the corridor.

Table 18. Top 5 concerns about Martin Way for all respondents, transit users, walkers and mobility device users, and bicyclists.

Top 5 Concerns	All Respondents	Transit Users	Walkers & Mobility Device Users	Bicyclists
1	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter
2	Sense of safety	Level of crime	Sense of safety	Availability of trails
3	Level of crime	Availability of crosswalks	Level of crime	Ease of walking
4	Availability of trails	Sense of safety	Availability of trails	Sense of safety
5	Ease of biking	Ease of biking	Ease of biking	Level of crime

Martin Way’s Future

All survey participants were asked what they felt was important as the community plans for the future of Martin Way. Regardless of race and ethnicity, income, and whether or not you lived on the corridor, improving safety for all users was consistently the number one priority. Increasing places to safely cross Martin Way and improving accessibility for people with disabilities were also consistently one of the top five priorities regardless of race and ethnicity, income, and whether or not you lived on the corridor. Residents, non-residents, and people of color were also interested in moving traffic quickly through the corridor. Residents, people of color, and those with a household income less than \$35,000 also prioritized improving street lighting. Finally, developing a trail system rounded out the top five for non-residents while improving housing affordability was important to people with a household income less than \$35,000.

Table 19. Top 5 issues to address for Martin Way’s future

Top 5 Issues	Residents	Non-Residents	People of Color	Household Income Less than \$35,000
1	Improve safety for all users	Improve safety for all users	Improve safety for all users	Improve safety for all users
2	Move traffic quickly through the corridor	Move traffic quickly through the corridor	Move traffic quickly through the corridor	Improve accessibility for people with disabilities
3	Increase places to safely cross Martin Way	Increase places to safely cross Martin Way	Increase places to safely cross Martin Way	Improve housing affordability
4	Improve street lighting	Improve accessibility for people with disabilities	Improve accessibility for people with disabilities	Improve street lighting
5	Improve accessibility for people with disabilities	Develop a trail system	Improve street lighting	Increase places to safely cross Martin Way

Planning for the Future of Martin Way

Both corridor residents and nonresidents were asked what – of 13 topics – they thought were most important in planning for the future of Martin Way.

- Ensure there is a mix of different kinds of housing for young adults, families, and older adults
- Increase the amount of rental housing
- Improve housing affordability
- Increase places to safely cross Martin Way (for example: add crosswalks)
- Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations
- Improve accessibility for people with disabilities
- Bring new businesses and jobs
- Faster bus service that comes more often
- Improve street lighting
- Move traffic quickly through the corridor with minimum delay
- Improve safety for all users
- Add more landscaping and shade trees
- Increase mix of businesses and services within walking distance

7.2 - Business Survey

TRPC partnered with the Thurston Economic Development Council (EDC) to conduct a survey of businesses located along or near the Martin Way corridor project area between January and March 2021. The survey was conducted through a variety

of methods, including an online survey, phone interviews, in-person interviews, and email correspondence. Of the 450 businesses along the corridor invited to participate, 80 businesses responded for a response rate of 18 percent. The full survey report is included as Appendix 2.

Who responded to the business survey?

Type...

nearly 2/5 were retail businesses

Location...

2/5 are in Segment 4

Employees...

2/5 have less than 5 employees
1/3 have 5-10 employees

How Long in Business...

nearly 1/2 have been in business for 10 years or less

Type...

- 38% Retail Trade
- 11% Accommodation & Food Services
- 10% Education Services, Health Care, & Social Assistance
- 10% Other Services
- 9% Finance & Insurance
- 9% Professional & Real Estate Services
- 8% Wholesale Trade, Transportation, & Warehousing
- 6% Construction & Manufacturing

Location...

- 15% in Segment 1
- 23% in Segment 2
- 11% in Segment 3
- 40% in Segment 4
- 11% in Segment 5

Employees...

- 42% less than 5 employees
- 33% 5-10 employees
- 18% 11-20 employees
- 8% more than 20 employees

How Long in Business...

- 25% 0-5 years
- 22% 6-10 years
- 23% 11-20 years
- 22% 21-40 years
- 8% more than 40 years

Business Access

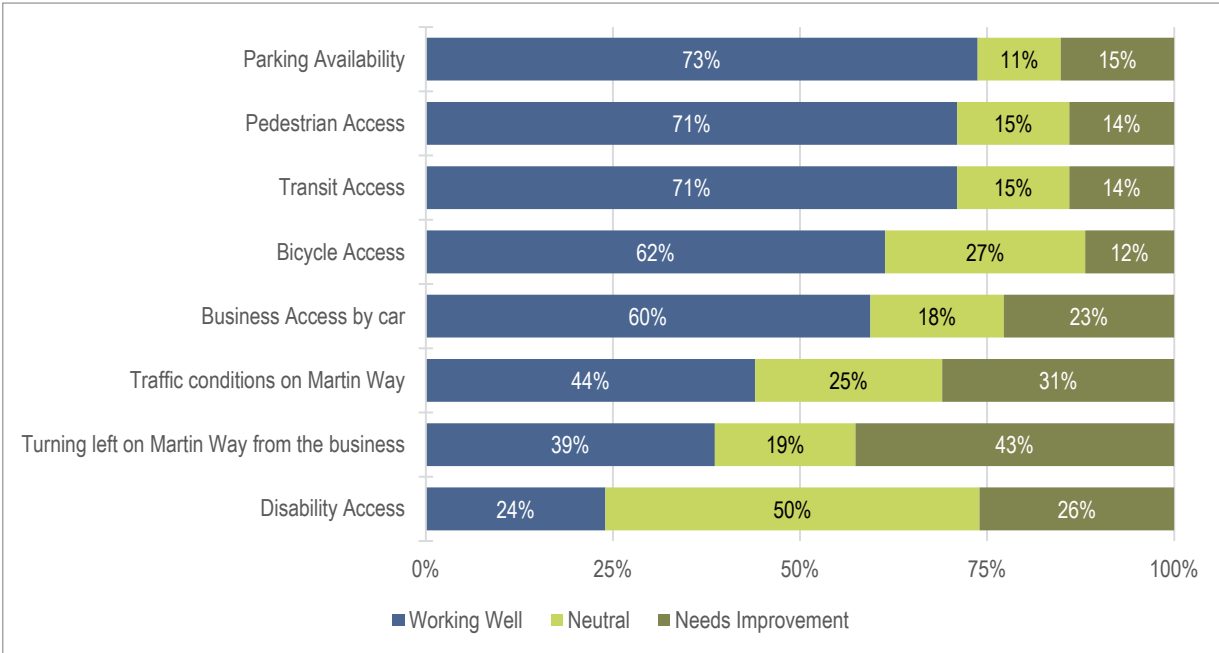
Businesses were asked whether 14 aspects of the Martin Way corridor were working well for their business, with particular focus on access. Of the eight metrics focusing on access, businesses indicated the areas needing the most improvement included a customer’s ability to turn left onto Martin Way from the business, traffic conditions on Martin Way, and access for persons with disabilities. More than half of respondents reported access to the business by car was working well for them. This was true regardless of which corridor segment the business was located in.

What’s Working Well

Respondents to the business survey were asked whether the following items were working well for their business:

- Access by car to business from Martin Way
- Access by car from business to Martin Way (eg left turns)
- Access by bicycle
- Pedestrian access (sidewalks, walkways)
- Access by bus
- Amount of parking
- Location or layout of parking
- Lighting
- Landscaping
- Traffic conditions on Martin Way
- Amenities such as parks or paths
- Access for persons with disability
- Nearby housing
- Overhead cost

Figure 28. Access issues on Martin Way: What’s working for businesses.



Retaining a Quality Workforce and Regular Customers

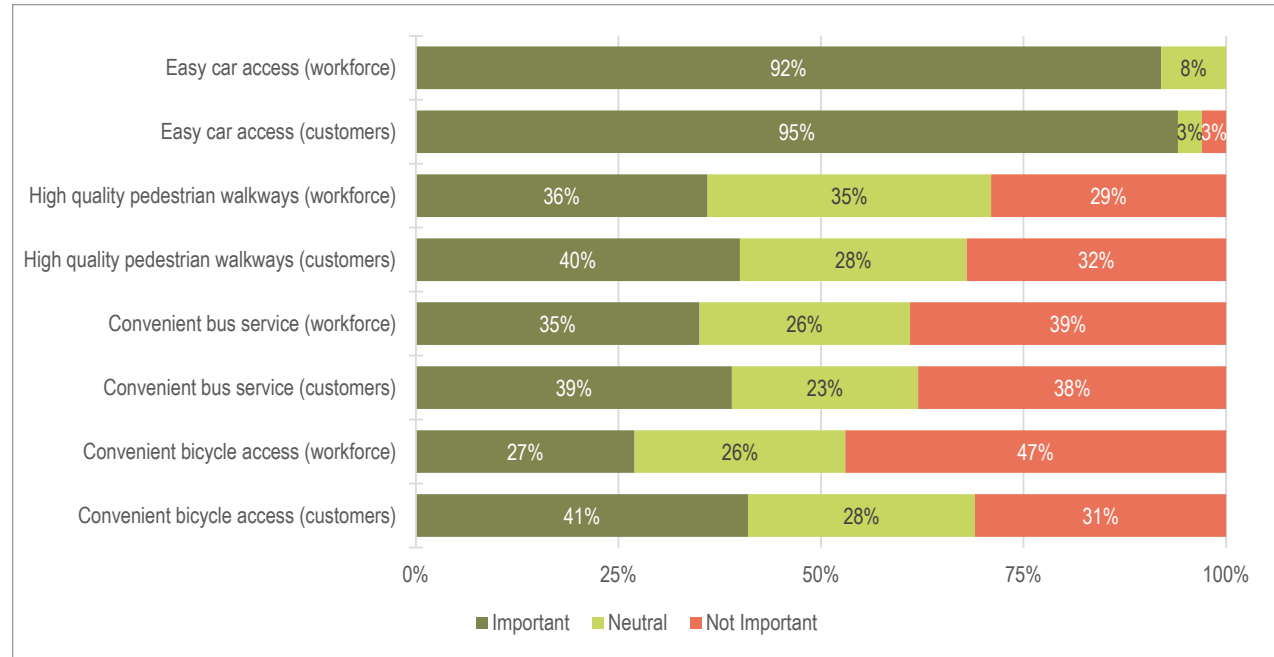
Respondents to the business survey were asked to identify how important the following metrics were to their regular customers and in retaining a quality workforce:

- Convenient bus service
- Easy car access
- Convenient bicycle access
- High quality pedestrian walkways

Business Success

Businesses were asked how important four factors were to their regular customers and to retaining a quality workforce. Easy access by car was identified by more than 90 percent of businesses as important to their regular customers and retaining a quality workforce. Less than half of surveyed businesses indicated high quality pedestrian walkways, convenient bus service, and convenient bicycle access were important.

Figure 29. Business access and retaining a quality workforce



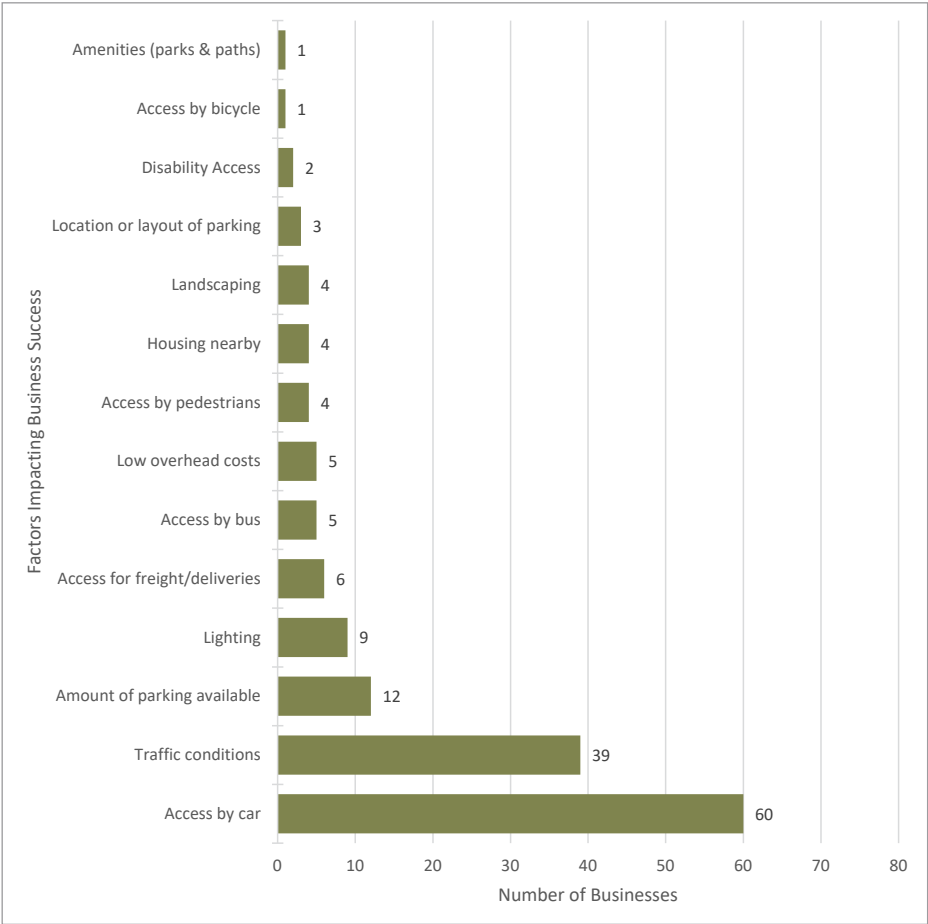
Businesses were also asked what of 13 factors were most important to their business success. Each respondent could choose up to three factors. Regardless of where the business was located, respondents consistently indicated access by car and traffic conditions were two of the three most important factors that impact the success of the business. The amount of parking available and lighting were two other important factors impacting business success.

Figure 30. Factors that bring success to Martin Way businesses.

Which of the following are the most important to the success of your business? (Select 3 max)

Respondents were asked which of the following 13 metrics were most important to their business' success:

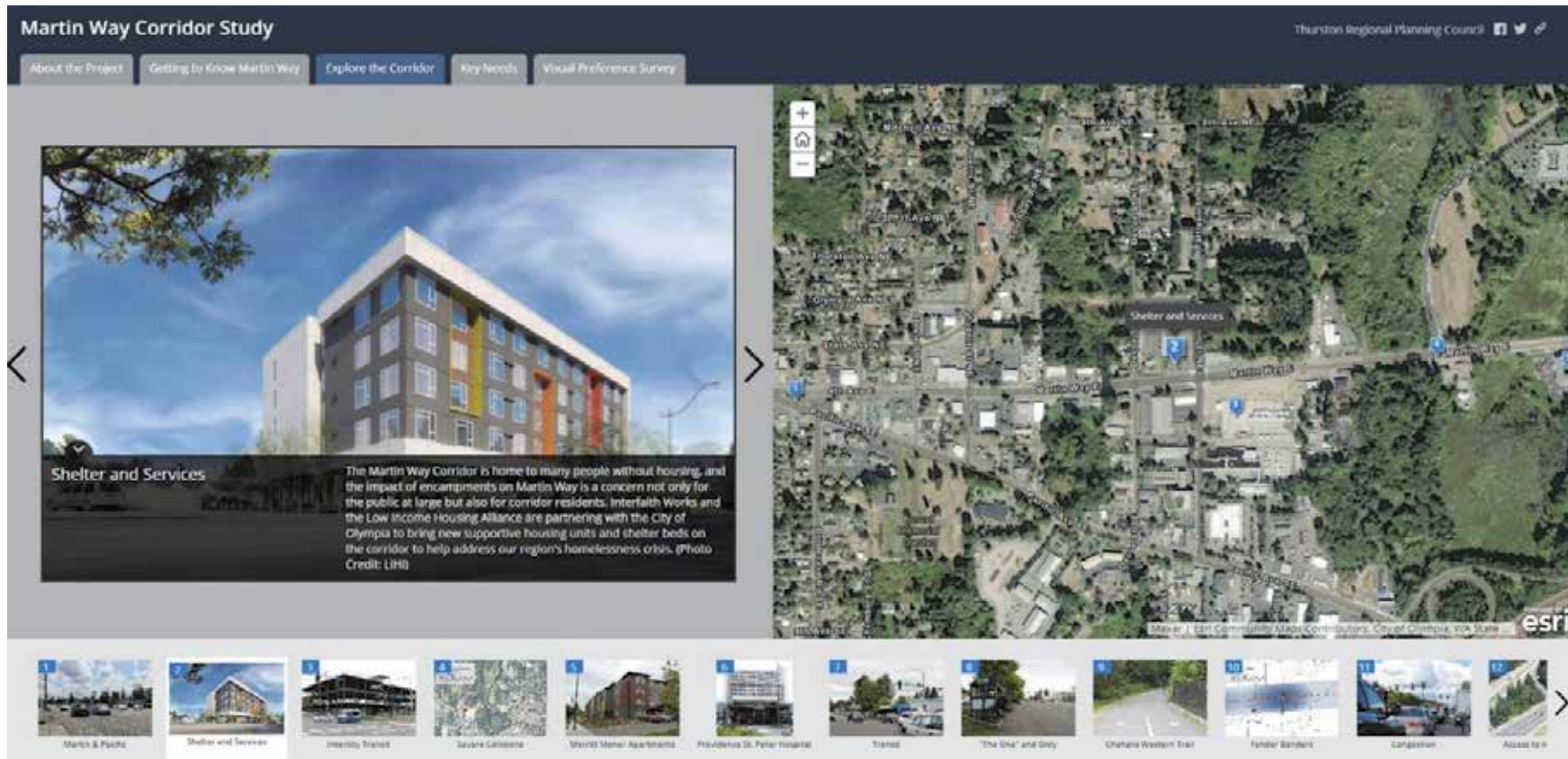
- Access by car
- Access for freight/deliveries
- Access by bicycle
- Access by pedestrians
- Access by bus
- Amount of parking space
- Location or layout of parking
- Lighting
- Landscaping
- Traffic conditions
- Amenities (parks & paths)
- Low overhead costs
- Housing nearby



7.3 - Public Meetings

Public health precautions related to the COVID-19 pandemic limited opportunities for in-person public meetings during the study period. Instead, TRPC hosted an online open house from June 11 through July 7, 2021 that provided information about the project and current conditions in the Martin Way Corridor. The site saw a total of 1,484 visitors during this period.

Figure 31. A screenshot from the Martin Way Corridor Summer 2021 Online Open House, which allowed visitors to explore elements of the corridor.



TRPC and partner organization staff hosted a virtual public meeting on June 23rd, using the Zoom webinar platform. Attendees had an opportunity to hear presentations on different aspects of the project, provide feedback on poll questions, and ask questions. A total of 24 people attended the virtual meeting.

As part of the online open house, members of the public had an opportunity to provide feedback on key needs for the corridor, and their preferences for how Martin Way could look in the future. Nearly 900 people took the survey. Full results are summarized in Appendix 3, but a few takeaways from that survey included:

- **Buildings and Land Use:** Survey respondents showed strongest support for seeing more public amenities along the corridor (82 percent), such as a community center, park, or library. There is also high support for additional neighborhood-serving businesses (73 percent), such as retail, services, and restaurants. Respondents felt that small and medium retail uses are appropriate to site directly adjacent to the sidewalk on Martin Way, but that other land uses, like housing, should be separated from the street by open space or parking areas.
- **Housing:** More than a third of respondents (42 percent) would like to see more housing along the corridor. Lower density housing types like townhomes and 2-3 story apartments are preferred over higher density types, but a quarter of respondents think 5-7 story apartments are an appropriate type of development for Martin Way. In general, respondents who are lower income, younger, people of color, and/or renters tended to be more supportive of housing with lower support for commercial uses.

- **Transportation Improvements:** Survey respondents showed high support for changes to the roadway that improve pedestrian and bicyclist safety. The majority (51 percent) would prioritize filling sidewalk gaps in front of existing businesses. Among crosswalk treatments, respondents preferred those with a flashing beacon or signal. When considering bicycle infrastructure, a protected bike lane with a physical barrier had the greatest support, followed by a shared use path.
- **Landscaping:** There is a high level of support for additional landscaping along Martin Way, particularly for placing street trees between the roadway and sidewalk and landscaped medians. These two treatments were among those with the most support from low-income respondents and people of color.
- **Signs:** Of the five types of signs tested, monument signs were identified as the most appropriate for Martin Way among all groups, followed by pole signs. Only 15 percent of respondents consider temporary signs to be important or very important for wayfinding on the corridor.

Figure 32. Visual preference survey responses for building and land uses.

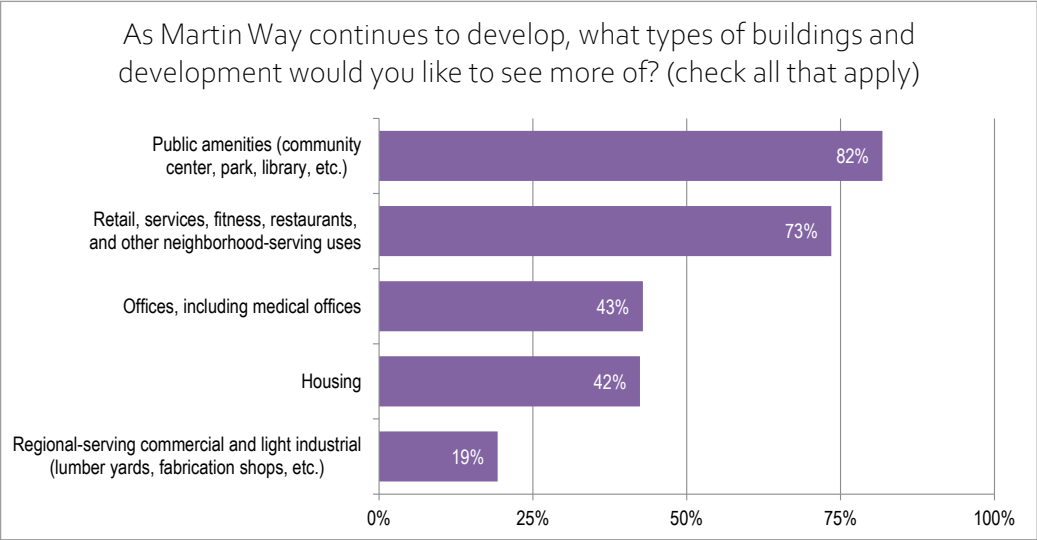
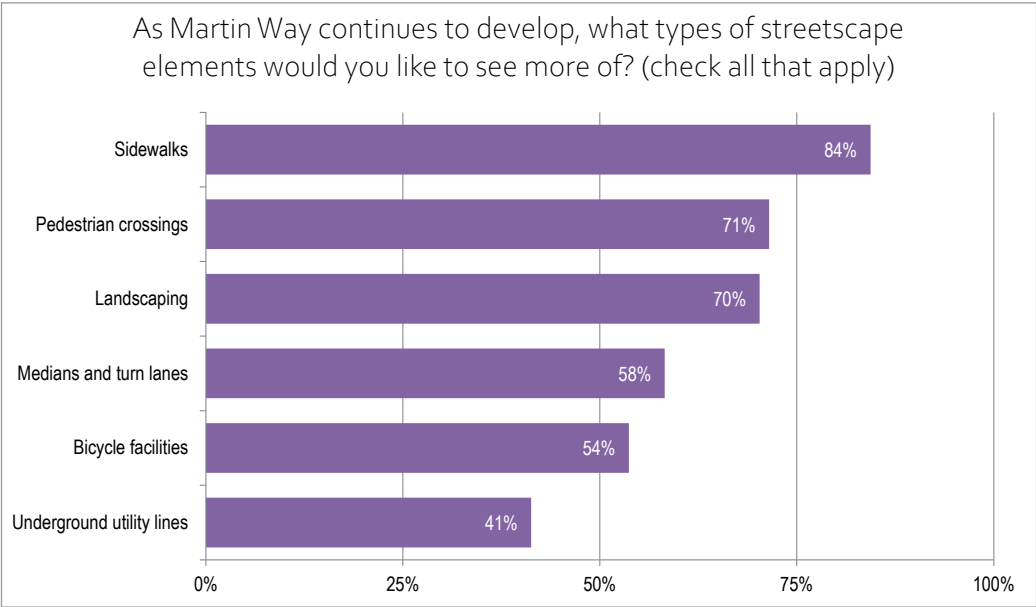
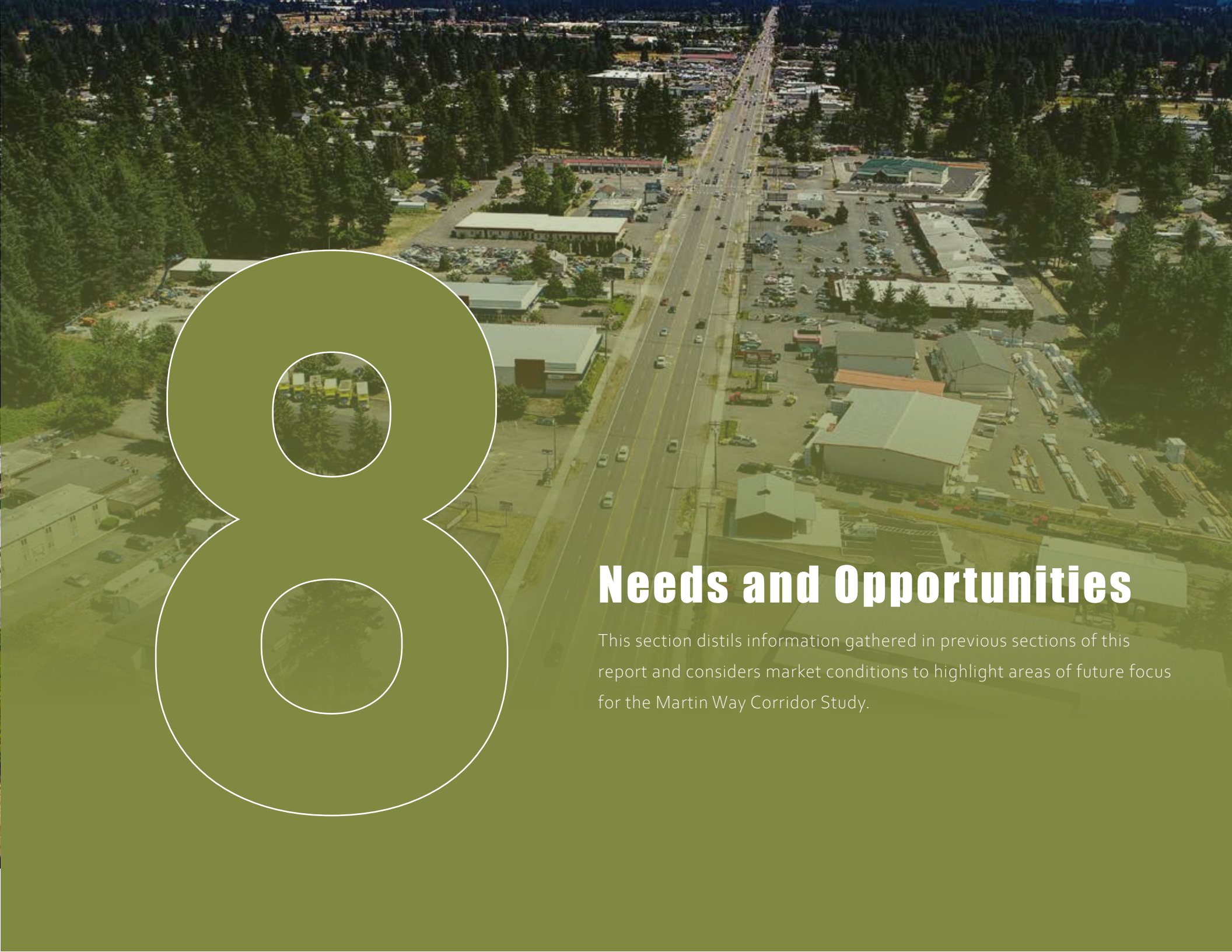


Figure 33. Visual preference survey responses on streetscape elements.





Needs and Opportunities

This section distils information gathered in previous sections of this report and considers market conditions to highlight areas of future focus for the Martin Way Corridor Study.



8.1 Key Needs

Over its nearly 90-year history, Martin Way has evolved and been shaped by market forces and community needs, and today it continues to serve as a vital connection for people throughout the Thurston County region. Yet it is clear this one-time state highway is falling short of the vision set by local jurisdictions in their Comprehensive Plans. That current vision can be summarized as:

The Martin Way Corridor is an attractive mixed-use, high-density residential and commercial area where people enjoy walking, shopping, working, and living. Over time, it will transition away from automobile-dominated use to a more pedestrian-friendly streetscape that also encourages bicycling and supports high-capacity transit.

Despite holding this vision for two decades, the corridor can continue to be described as an area where residential and commercial uses are separated and one that is most welcoming to those traveling by automobile. The next phases of this study will include evaluating different strategies and improvements to identify those that will best support a preferred alternative. Areas for focus include:

- **Support for inclusive growth.** Under current regulations and projections, the corridor is expected to see an additional 3,000 new housing units and 6,000 new jobs over the next 25 years. While this is a significant increase from current conditions, achieving the region's *Sustainable Thurston* land use goal of creating vibrant corridors will require even more concentrated development along Martin Way. Alternatives could investigate the land uses, regulatory tools, market incentives, and infrastructure improvements that would bring this vision to fruition. Such alternatives should consider how to grow in a way that maintains access to more affordable housing and social services, and limits displacement of the low-income and other established communities that call the corridor home today.
- **Improving safety for all users of the corridor and all modes.** Safety is a significant concern throughout the corridor. Martin Way's high traffic volumes, numerous driveways for accessing businesses and residential developments, and a lack of consistent pedestrian and bicycle infrastructure presents safety challenges for all users. Alternatives should look at ways to address collision hotspots and contributing factors, and should consider ways to increase the perception of safety with strategies to help pedestrian, bicycle, and transit users and those with disabilities and other access challenges feel they are on equal footing with drivers.
- **Balancing the needs of different users of the transportation network.** Many past reports on Martin Way have identified the need to build a more pedestrian- and bicycle-friendly environment. This includes filling remaining gaps in the sidewalk system, improving crossings for people walking and biking, improving the trail system and providing more access to it, and developing a lower-stress network for people biking on the street with protected bike lanes. Martin Way has long been identified as a key transit corridor, and higher-

capacity transit will be critical to supporting growth in the corridor and wider region in ways that minimize congestion and greenhouse gas emissions, while providing convenient and lower-cost transportation options to community members. At the same time, current residents and businesses in the corridor rely heavily on access by private vehicles, and say that convenient access by car is among the things they like best about the corridor today. In the future, Martin Way will need to continue to function as a major route for freight and emergency access (to medical services and as an alternative route for I5), and will provide a key access point to the freeway system. Analysis should carefully assess the potential for conflict among these different users and uses, and identify priorities and strategies to provide the best balance of services to future travelers.

- **Increasing connectivity.** While Martin Way connects people throughout the Thurston County region to shops, homes, offices, schools and more, it also creates a barrier, with limited north/south cross streets and few safe crossings for people walking and biking. The transitions from the high-intensity development directly on Martin

Way to adjacent low-density residential neighborhoods are abrupt. Alternatives should look at ways to ensure there are logical and convenient links among residential areas, commercial nodes, transit stops, and trails.

- **Improving continuity across jurisdictions.** Currently, the application of different standards in areas under different jurisdictional authority can contribute to the disjointed feel of the corridor. Shared standards, and consistent implementation of those standards, would help create a greater sense of cohesion. These should include consistent transit-supportive policies and infrastructure improvements to ensure the success of high-capacity bus service. Alternatives should look at ways to create a seamless experience for drivers, pedestrians, bicyclists, and transit riders. At the same time, standards must allow some variation to account for the individual needs, resources, and characters of each jurisdiction.
- **Building a sense of place and ownership.** Today, most users of Martin Way see it as a route to get through, rather than a place to be. Yet the Martin Way Corridor has many amenities that could be better showcased, with its

extensive sections of open space and essential community institutions, including schools, a hospital, and many public services. Alternatives should consider ways to beautify and highlight this community asset and identify potential hubs or opportunity areas where redevelopment could help ground the corridor and establish its identity.

8.2 Market Study

The project partners contracted with Leland Consulting Group to conduct a market study to identify economic opportunities and constraints, as well as potential models for future development in the Martin Way Corridor. The market study gathered information from background past studies, Census, building permit, and real estate data, and economic trends, as well as stakeholder interviews with local developers, brokers, major employers, and public agency partners. The complete market study can be reviewed in Appendix 4.

Based on these interviews, market conditions are generally perceived as favorable for future economic growth and development across the region and within the Martin Way Corridor. The Martin Way Corridor faces similar challenges





to that of other former and current highways in secondary or less prominent urban markets, with parcelized, underutilized, and fragmented land use patterns that make redevelopment challenging. The lack of a centralized area of focus exacerbates these challenges.

Key Takeaways

- **Nodal Development.** There is not currently a central focus of investment in the corridor. Select locations are on the cusp of transitioning into a moderate density environment. Focusing attention to specific nodes with major development opportunities can give rise to a suburban town center typology—a mixed-use hub that offers entertainment, apartments, and offices.
- **Development Timing.** Market conditions along the Martin Way Corridor still only support surface parked development typologies. The corridor is in transition, however, and may begin to see higher-density developments with a mix of structured and surface parking. From an investment

perspective, opportunities include low interest rates, land availability, and rising rents. However, construction costs are expected to continue increasing at the current record pace, so it may take many years before this actually comes to fruition.

- **Housing.** Demand is expected to remain strong for residential uses, particularly apartments. Pent-up demand, among other factors, has driven rents to levels that we believe are on the cusp of supporting higher density development types. The Martin Way Corridor is now a proven market for wood framed, walkup apartments but remains unproven for higher density or mixed-use developments with more experience construction types and structured parking.
- **Retail.** While the Martin Way Corridor is saturated with retail space, particularly general merchandise and big box retailers, opportunities exist to promote smaller, independent retailers and restauranters that provide amenities and services to local workers and residents.

Focused investments to the Martin Way streetscape and specific nodes may result in aesthetically pleasing public space and land uses that attracts new tenants.

- **Office.** Office prospects are likely limited for the foreseeable future. Employment growth is expected to continue in the industries of government, healthcare, and warehousing and transportation. Government and healthcare-related office will likely be limited to Olympia in select locations. Professional and financial office may occur as part of mixed-use developments further to the east in the future.
- **Industrial.** The vision for the Martin Way Corridor does not align with the current opportunities and trends in industrial development (big box warehousing and distribution). However, incremental improvements—particularly in the Tanglewilde-Thompson area—to existing light industrial properties will likely have modest impacts on market conditions throughout the corridor.

Strategies and Tools

The market study identified several strategies and tools that may improve market conditions and support development that is in keeping with the vision for the corridor. Some tools are in place already and may be expanded, and others may be considered in the future.

- **Tax Credits** provide incentives to construct specific housing types in targeted areas. The Low Income Housing Tax Credit program (LIHTC) provides a tax incentive to construct or rehabilitate affordable rental housing for low-income households. Olympia currently offers a Multifamily Tax Exemption (MFTE) in the western section of Martin Way that provides an eight to 12-year tax exemption on the building value of eligible housing projects. The program currently stops at Lilly Road.
- **Bonuses and Waivers.** Cities can decide to waive certain fees for certain development types or award bonuses (density, parking) for including certain components.
- **Public-Private Partnerships (PPPs).** PPPs do not have to be big joint ventures; cities can also agree to fund

or construct infrastructure improvements that may be prohibitively expensive for developers. Partnerships with local colleges and healthcare institutions may provide additional opportunities.

- **District-wide funding tools.** Tax Increment Financing is currently being debated by the State Legislature.
- **Placemaking.** Public space, plazas, trails, and sidewalks are critical public investments for mixed-use environments. Local governments may need to construct the sidewalks and bike lanes through the critical areas rather than expecting development to build that infrastructure (since there won't be development in those areas).
- **Phasing.** Developing large sites can often be done in a way that limits the need to take significant financial risks upfront. Infrastructure should be built incrementally and flexibly, using a variety of funding sources and financing tools.
- **Property Acquisitions and Land Banking.** As land prices increase, rent growth may not be enough to cover the

feasibility gap of higher density development types. Land banking (purchasing and holding land in order to preserve land for desired development types that might not yet be feasible) is one strategy to consider.

- **Housing Action Plans.** Both Olympia and Lacey are in the process of looking into potential future actions or have already adopted a variety of strategies to encourage a range of housing options. Olympia has identified land write-downs (discounted land prices for city-owned property), density and height bonuses, streamlining the permitting process, revising development standards, lowering impact fees, and reducing minimum lot sizes. Lacey's HAP recommendations are borne out of its affordable housing strategy to streamline affordable housing development.
- **Identify Private and Nonprofit Champions.** Often these entities and individuals are able or willing to take more risks for a lower return on investment and can therefore enter the market with lesser needs.

8.3 Next Steps

The project partners will use information gathered in this current conditions report and public input to develop alternative development options for the Martin Way Corridor. Additional information, including a development feasibility analysis and transportation operations analysis will help identify the strategies and improvements that will best help achieve the community's vision for Martin Way.

INTERcity TRANSIT

References



Chapter 9 References

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U.S. Census Bureau, American Community Survey (ACS) 5-Year Estimates from 2014-2018 ACS estimates for corridor segments are weighted averages, based on the percent of census block group population in each corridor segment.

10

Appendices

Appendix 1 Residential Survey



Residential Survey Summary

Task 2.f Deliverable

FINAL – April 1, 2021

1. Project Background

Martin Way is a major regional thoroughfare and corridor serving the communities of Olympia, Lacey, and Thurston County. The former state highway serves as the area’s primary alternative to Interstate 5, has frequent transit service, and is home to a variety of business activity and destinations. It connects people throughout the region to homes, businesses, services, and recreation. Looking to the future, the corridor is forecasted to grow in importance as a strategic transportation link and business destination. The Martin Way Corridor Study will examine multimodal safety and mobility issues, and incorporate transportation, land use, environmental, and economic development considerations. This project is a joint planning study between Thurston Regional Planning Council, Thurston County, City of Olympia, City of Lacey, and Intercity Transit.



Figure 1. Map of the study area with numbered corridor segments

Martin Way Corridor Study Residential Survey Summary

The study area spans approximately 7.5 miles from where Martin Way and Pacific Avenue diverge in Olympia to its intersection with Dutterow and Meridian Road in the Lacey urban growth area. The corridor is broken into five segments (Figure 1, previous page):

- 1 - between Pacific Ave. and Lilly Rd.
- 2 - between Lilly Rd and College St.
- 3 - between College St. and Carpenter Rd.
- 4 - between Carpenter Rd. and Marvin Rd.
- 5 - between Marvin Rd. and Dutterow/Meridian Rd.

2. Survey Distribution & Response

In September 2020, TRPC administered a survey to learn more about the needs, concerns, and preferences among people who live along the corridor. Staff from the project partners developed the survey questionnaire collaboratively. The survey was mailed directly to 8,612 households within or near the corridor, and respondents could choose to reply either by returning the paper survey in a postage-paid envelope or by taking it online through the Survey Monkey platform. The online survey was promoted to other users of the Martin Way Corridor through:

- TRPC's homepage.
- Social media posts.
- GovDelivery message to riders of major bus routes along the corridor - Intercity Transit routes 65 62A, and The One.
- E-newsletter notice sent by the City of Olympia.

A total of 1,990 surveys (both online and paper) were returned.

The full survey sent to residents included 17 questions. In the online survey, those who identified themselves as not residing in the corridor area were asked a shorter subset of questions. The analysis below differentiates responses from corridor residents from other users of the corridor. See Appendix A for copies of the online and print versions of the survey.

3. Respondent Demographics

Question 1 asked about whether the respondent lived on the Martin Way corridor. Of the 1,686 responses received to this question, nearly half indicated they live on or near the corridor (Table 1, next page). One quarter work on or near the corridor, and another 22 percent often travel the corridor, though they don't live or work along it.

Table 1. Living on the Martin Way corridor

Martin Way Corridor Study Residential Survey Summary

Relationship to the Martin Way corridor	Respondents	
	Percent	Count
Martin Way Corridor residents	49%	818
Nonresidents	51%	868
<i>I own residential property on or near the Martin Way Corridor, but don't live there.</i>	2%	26
<i>I work on or near the Martin Way Corridor</i>	25%	429
<i>I don't live or work along the Martin Way Corridor, but I often travel on Martin Way</i>	22%	379
<i>I live outside the Martin Way Corridor, and don't own property there</i>	2%	34
Total Responses	100%	1,686
No Response	--	304

In addition to Question 1, Questions 15, 16, and 17 asked about who was responding to the survey. Most respondents were women, white, and have a household income of \$50,000 or more.

Who responded to the survey?	Race/Ethnicity [†] ...	Household Income [§] ...
Race/Ethnicity[†] ... nearly 9/10 were white	3% American Indian & Alaska Native 6% Asian 4% Black or African American 4% Hispanic or Latino 2% Native Hawaiian & Pacific Islander	9% earned less than \$24,999 14% earned \$25,000 to \$49,000 73% earned \$50,000 or more 5% didn't know
Live... nearly 1/2 were corridor residents	85% White 4% Other	Age* ... 24 or younger 25-39 40-54 55-69 70 or older
Household Income... nearly 3/4 earned \$50,000 or more annually	Live... 48% are corridor residents 52% live elsewhere	Gender... 59% female 37% male 1% other
Age* ... 1/4 were 25-39, 1/3 were 40-54, & 1/3 were 55-69		
Gender... nearly 3/5 were women		

[†] Respondents could choose more than one answer.

[§] A typo on the online and paper survey did not include those that make between \$49,001 and \$49,999.

* Reflects only responses from the online survey; the question regarding a respondent's age was unintentionally left off the paper version of the survey.

Martin Way Corridor Study
Residential Survey Summary

4. Corridor Residents

Question 1 also asked residents where they live along the Martin Way corridor (Table 2). For respondents who indicated they lived on or near the Martin Way corridor, more than half (56 percent) live east of Carpenter Road.

Table 2. Where residents live on the Martin Way corridor

Question 1: Where do you live along the Martin Way Corridor (see map - choose closest area)?		
Corridor Segment	Respondents	
	Percent	Count
1 - between Pacific Ave. and Lilly Rd.	20%	149
2 - between Lilly Rd and College St.	12%	91
3 - between College St. and Carpenter Rd.	11%	83
4 - between Carpenter Rd. and Marvin Rd.	29%	219
5 - between Marvin Rd. and Dutterow/Meridian Rd.	27%	204
Total Resident Responses	100%	746
No Response	--	71

Comparing the survey returns to the estimated population in the corridor segments, people living in Segment 5 are under-represented in responding to the survey with just 27 percent of responses coming from an area that represents 36 percent of the total Martin Way Corridor population (Figure 2). Conversely, people living in Segment 3 are over-represented, making up 11 percent of the survey returns but only three percent of the Martin Way Corridor population.



Figure 2. Comparing Martin Way survey resident responses to the corridor's estimated population
*Source: 2017 Population & Employment Forecast, Thurston Regional Planning Council

Martin Way Corridor Study Residential Survey Summary

Question 2 asked residents how long they have lived in their current location. Nearly half of all residents have lived in their current location for 10 or more years while only seven percent have lived in their current location for less than one year (Table 3).

Table 3. Residents' length of time living in current location along the Martin Way corridor

Question 2: How long have you lived in your current location?	Residents	
	Percent	Count
Length of Time		
Less than 1 year	7%	53
1-2 years	12%	85
2-3 years	9%	63
3-4 years	6%	45
4-5 years	6%	41
5-10 years	14%	106
10 or more years	47%	348
Total Resident Responses	100%	741
No Response	--	76

For residents who answered Question 2 about which part of the corridor they live in, residents in Segment 2 (between Lilly Rd and College St.) are significantly more likely to have resided in their current location for five years or less (Table 4 and Figure 3, next page).

Table 4. Residents' length of time living in current location along the Martin Way corridor by corridor segment

Question 2: How long have you lived in your current location?	Residents of:					Total Responses
	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5	
Length of Time						
Less than 1 year	13	4	4	16	16	53
1-2 years	10	17	7	25	26	85
2-3 years	15	9	11	6	22	63
3-4 years	10	9	5	9	12	45
4-5 years	10	9	7	7	8	41
5-10 years	28	19	7	30	22	106
10 or more years	62	24	42	123	97	348
Total Responses	148	91	83	216	203	741
No Response						76

Martin Way Corridor Study
Residential Survey Summary

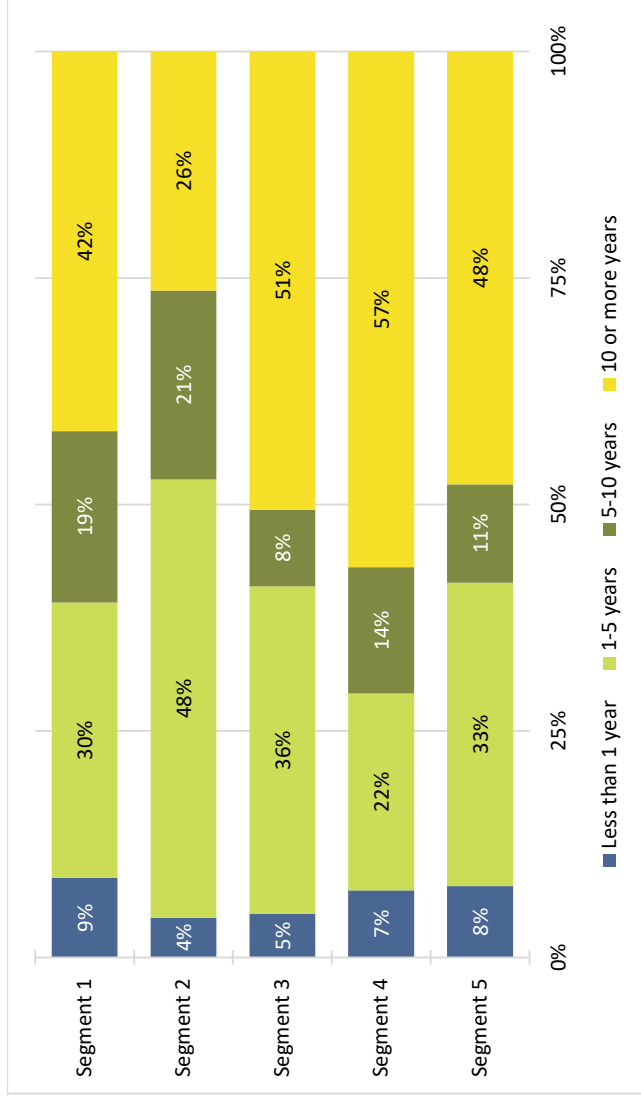


Figure 3. Residents' length of time living in current location along the Martin Way corridor by segment
Segment 1 - between Pacific Ave. and Lily Rd. | Segment 2 - between Lily Rd and College St. | Segment 3 - between College St. and Carpenter Rd. | Segment 4 - between Carpenter Rd. and Marvin Rd. | Segment 5 - between Marvin Rd. and Dutterow/Meridian Rd.

Question 3 asked about residents' living situation (Table 5). Nearly three out of four residents are homeowners (71 percent) while only 28 percent are renters. None of the corridor residents indicated they are unhoused or experiencing homelessness, although eight people indicated they live with someone else.

Table 5. Household tenure on the Martin Way corridor

Household Tenure	Respondents	
	Percent	Count
Rents our home	28%	215
Owens our home	71%	570
Lives with someone else	1%	8
Is unhoused or unsheltered	0%	0
Total Resident Responses	100%	793
No Response	--	24

Martin Way Corridor Study Residential Survey Summary

Although 48 percent of the corridor is made up of households that rent, only 27 percent of respondents are renters (Figure 4).

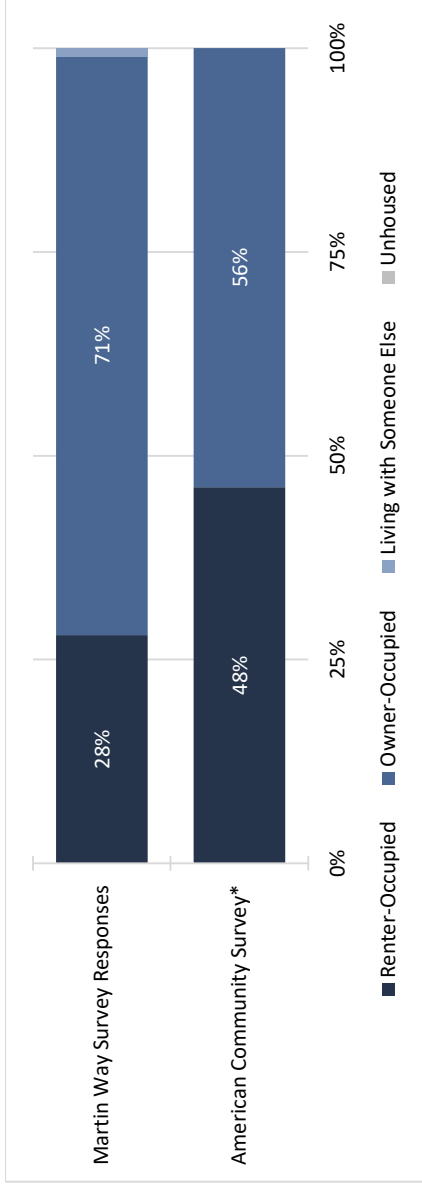


Figure 4. Comparing Martin Way survey resident responses to the American Community Survey

Source: US Census Bureau, 2014-2018 American Community Survey

* The ACS does not include options for households who live with someone else and those that are experiencing homelessness, so a direct comparison is not possible.

Corridor residents were also asked about their work situation and could give more than one answer (Table 6 and Figure 5, next page).

Table 6. Where Martin Way corridor residents work

Work Location *	Respondents	
	Percent	Count
At my home	14%	107
At a business or office located on the Martin Way Corridor	14%	103
At a business or office located elsewhere in Thurston County	25%	183
At Joint Base Lewis-McChord, active-duty military	3%	23
At Joint Base Lewis-McChord, civilian or contract position	2%	17
At a business or office located elsewhere in Pierce County	4%	27
At a business or office located somewhere else	7%	50
Retired	36%	266
Not employed	4%	28
Total Resident Responses	--	744
No Response	--	73

* Respondents could give more than one answer.

Martin Way Corridor Study
Residential Survey Summary

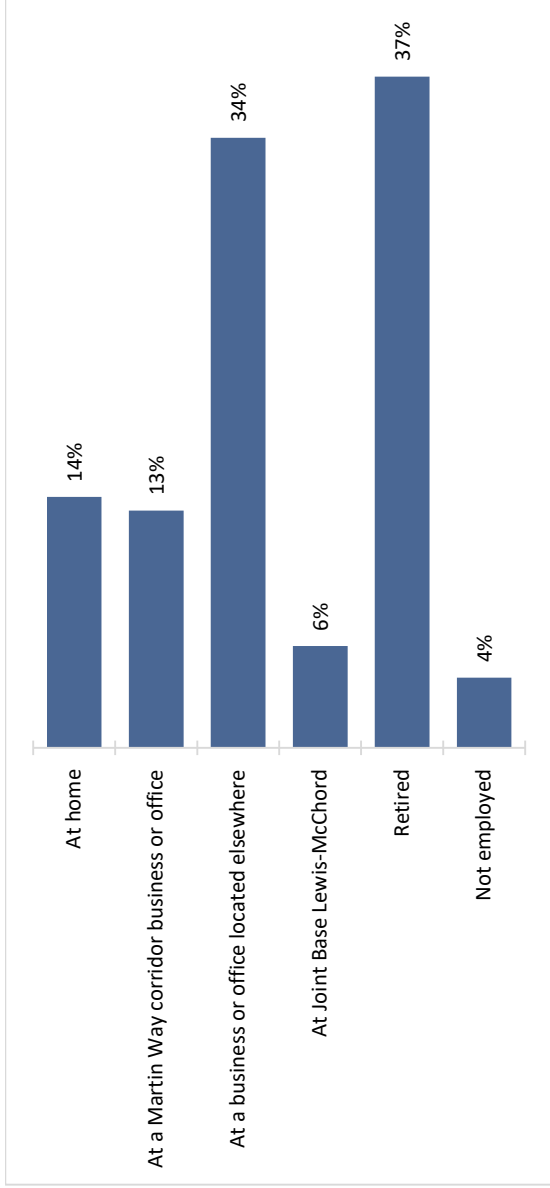


Figure 5. Where Martin Way corridor residents work. Respondents could give more than one answer.

Question 6 asked residents what they liked most about living on or near Martin Way (Figure 6). Many respondents appreciate the convenience and ease of access to Interstate 5 (I-5) and the corridor’s businesses.

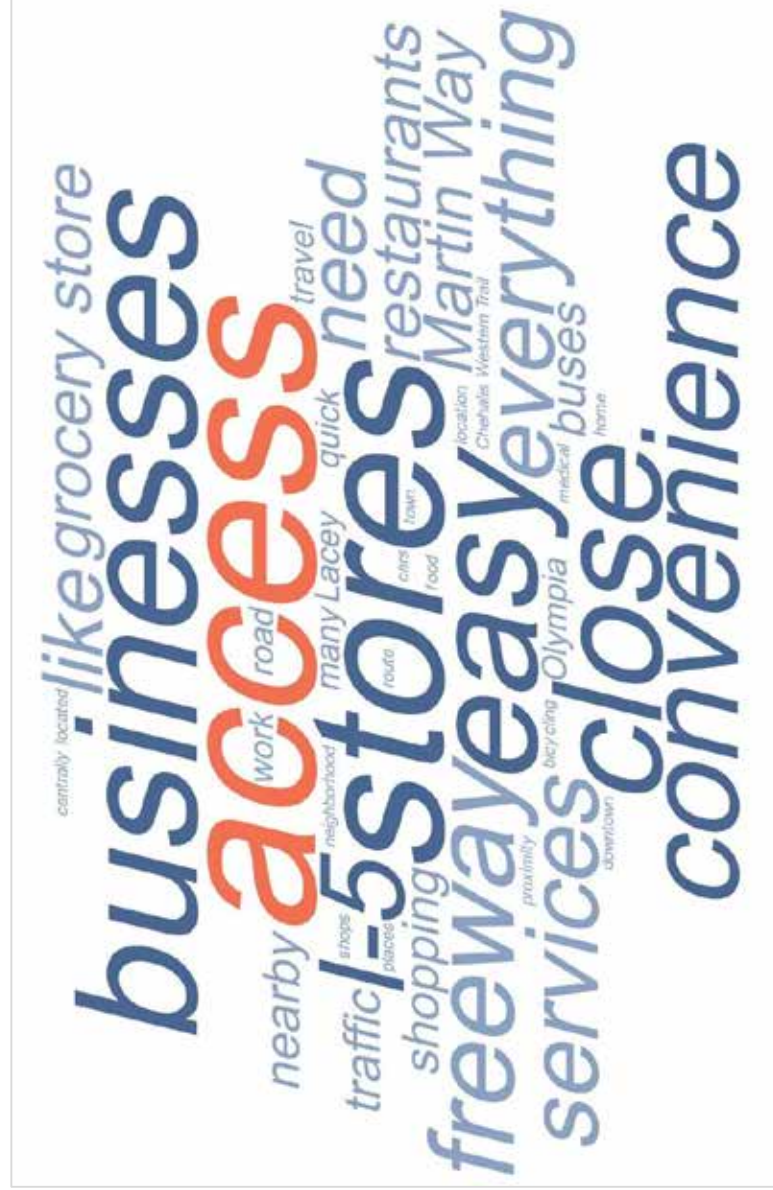


Figure 6. What do you like most about living on or near Martin Way?

Martin Way Corridor Study Residential Survey Summary

Question 7 asked residents what they would do to improve Martin Way (Figure 7). Many respondents want to see better signal timing to improve traffic flow and reduce stop-and-go traffic. Other concerns include addressing the homelessness impacting the corridor, adding bike lanes and trails, installing continuous sidewalks along Martin Way and other streets, addressing safety issues, and improving the overall look of the corridor – from maintaining landscaping to picking up trash to improving the look of businesses and buildings.



Figure 7. If you could do one thing to improve Martin Way, what would you do?

Martin Way Corridor Study
Residential Survey Summary

Question 9 asked residents about the businesses and services they need and how easy it is to access them (Table 7).

Table 7. Accessing businesses and services

Response	Very hard to get to	Moderately hard to get to	Neutral	Moderately easy to get to	Very easy to get to	Total
Grocery stores/markets	18	105	72	292	306	793
Convenience stores	11	66	174	214	274	739
Specialty/ethnic markets	26	97	259	186	137	705
Pharmacies	17	75	150	259	252	753
Parks, trails, and public places to enjoy nature and open space	57	118	225	196	128	724
Schools	11	35	346	131	150	673
Hospital and doctors' offices	20	104	146	287	201	758
Restaurants	14	97	141	287	215	754
Coffee shops	10	65	194	229	217	715
Fitness clubs or places to work out	19	58	317	159	143	696
Social services (such as unemployment office)	41	69	406	72	58	646
Local businesses	14	104	149	304	168	739
Chain retailers (such as Target or Home Depot)	16	99	87	302	261	765
Different kinds of housing	25	41	391	94	88	639
Affordable housing	64	65	376	61	66	632
Entertainment (movies, etc.)	21	74	196	250	173	714
Total Resident Responses						788
No Response						29

Martin Way Corridor Study Residential Survey Summary

In Figure 8, responses were converted into percentages and placed on a scale of -100% to +100% where negative percentages indicate accessing a business or service is moderately or very hard and positive percentages indicate accessing a business or service is moderately or very easy. Neutral responses are not represented in Figure 8. In general, residents were more likely to indicate accessing a business or service is easy. Residents were more evenly split regarding accessing affordable housing and social services. About 22 percent of respondents indicated accessing parks, trails, and public places is either moderately or very hard to access.

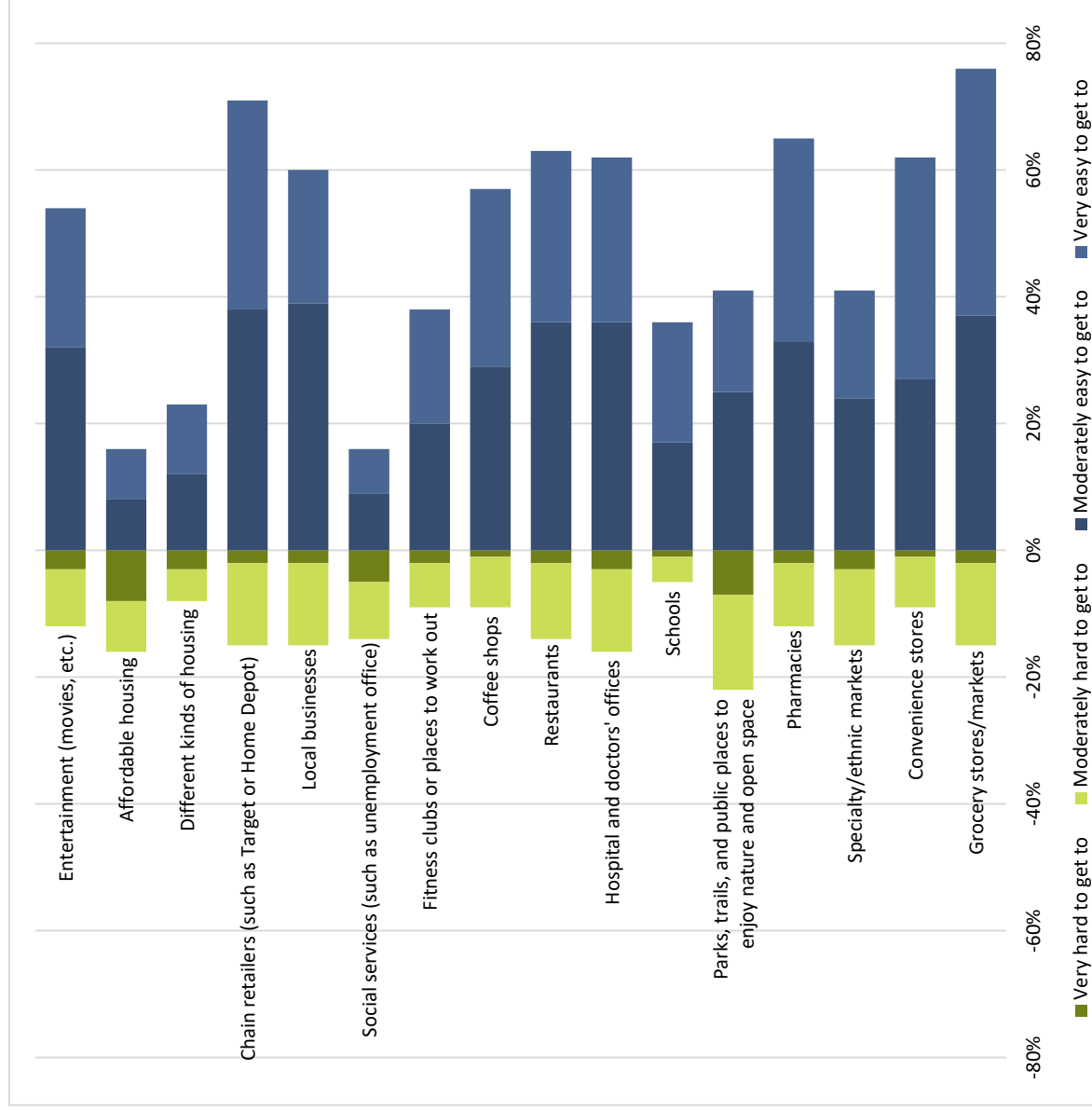


Figure 8. Accessing businesses and services. In the figure above, negative percentages indicate accessing a business or service is moderately or very hard and positive percentages indicate accessing a business or service is moderately or very easy. Neutral responses are not represented above.

Martin Way Corridor Study
Residential Survey Summary

Question 10 asked residents about their level of satisfaction with 14 aspects of the corridor including how easy it is to walk or bike the corridor, the location of bus stops, how safe residents feel, etc. (Table 8).

Table 8. Level of satisfaction with 10 aspects of Martin Way

Question 10: As a resident living near the Martin Way Corridor, tell us how satisfied you are with aspects of the area.						
Answer Choices	Very unsatisfied	Moderately unsatisfied	Neutral	Moderately satisfied	Very satisfied	TOTAL
Ease of walking	114	188	202	177	93	774
Availability of sidewalks	137	198	166	173	92	766
Availability of crosswalks	107	174	207	193	82	763
Ease of biking	80	147	346	88	51	712
Availability of bike lanes	71	149	336	103	58	717
Availability of trails	105	175	265	110	67	722
Frequency of bus service	48	51	428	105	80	712
Location of bus stops	51	63	411	112	81	718
Ease of walking to bus stops	70	76	380	111	79	716
Amount of trash or litter	222	247	137	124	29	759
Sense of safety	162	262	149	171	41	785
Level of crime	129	247	223	127	33	759
Availability of parking	49	91	297	208	94	739
Community feel/neighborliness	112	173	232	197	56	770

Martin Way Corridor Study Residential Survey Summary

In Figure 9, responses were weighted on a scale of -2 to +2 where -2 indicated the respondent is very unsatisfied and +2 indicated the respondent is very satisfied. Overall, respondents were unsatisfied with 10 aspects of the corridor and satisfied with four. Of the greatest concern for residents was the amount of trash and litter, sense of safety, and the level of crime on the corridor. Aspects residents were satisfied with include the availability of parking, the frequency of bus service and location of bus stops, and the ease of walking to bus stops.

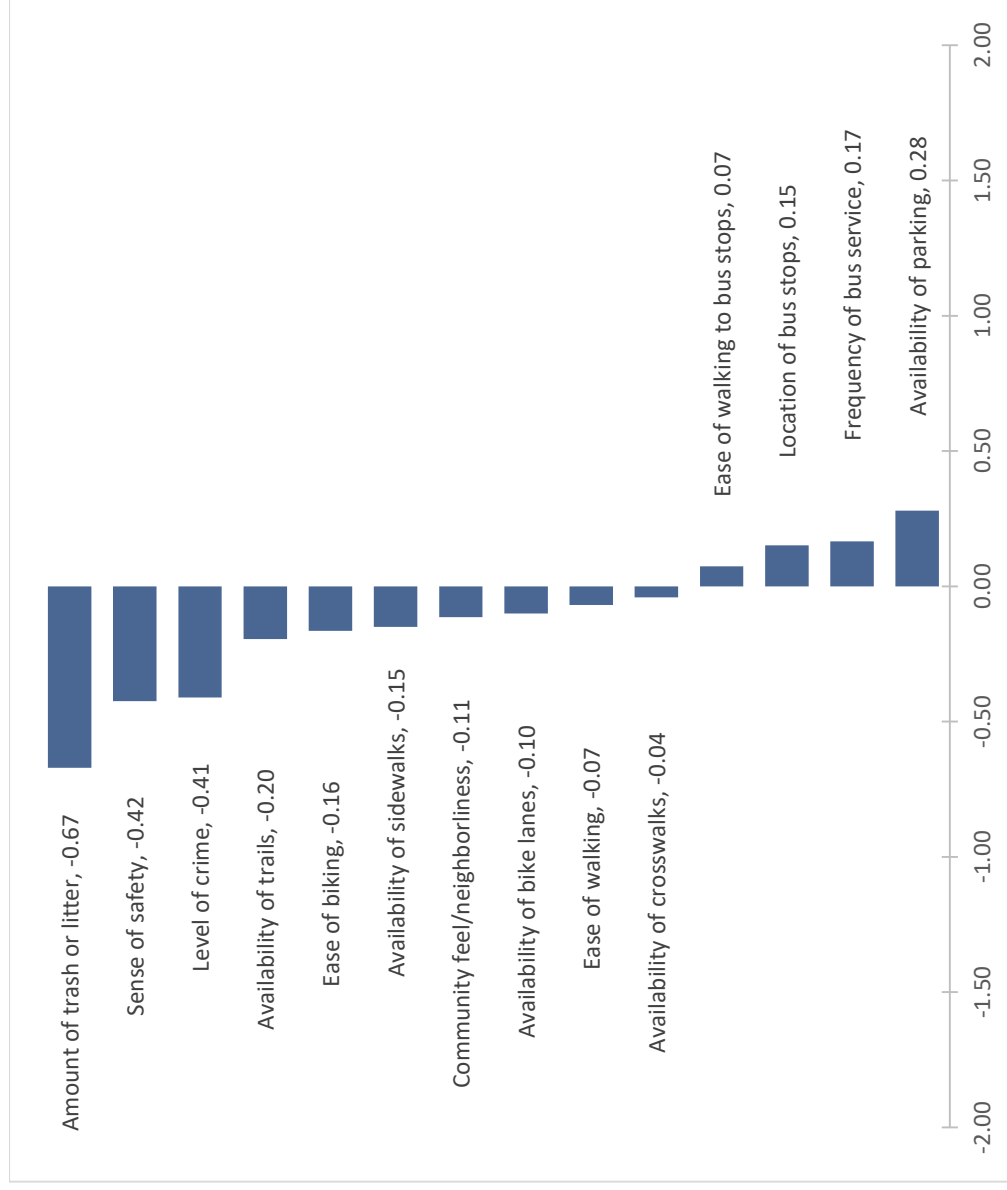


Figure 9. Level of satisfaction with 10 aspects of Where Martin Way (-2 to +2)

Martin Way Corridor Study
Residential Survey Summary

Using the same -2 to +2 scale, resident responses were weighted and reviewed by corridor segment (Table 9). The data shows the amount of trash or litter, sense of safety, and level of crime were consistently three of the greatest concerns for corridor residents. Corridor residents in the five segments differed on the two other issues that rounded out the top five concerns:

- For Segment 1 residents, the ease of walking and availability of sidewalks
- For Segment 2 and 3 residents, community feel/neighborliness and the availability of trails
- For Segment 4 residents, the availability of trails and ease of biking
- For Segment 5 residents, the availability of trails and sidewalks.

Table 9.5 Aspects of greatest concern to Martin Way corridor residents by corridor segment

Top 5 Concerns	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
1	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter
2	Sense of safety	Level of crime	Sense of safety	Level of crime	Availability of trails
3	Level of crime	Sense of safety	Availability of trails	Sense of safety	Sense of safety
4	Ease of walking	Community feel/neighborliness	Level of crime	Availability of trails	Level of crime
5	Availability of sidewalks	Availability of trails	Community feel/neighborliness	Ease of biking	Availability of sidewalks

Martin Way Corridor Study Residential Survey Summary

Figure 10 compares responses received from those with a household income less than \$35,000 per year to those with a household income of \$35,000 or more. Figure 11 (next page) compares responses from people of color compared to those who are white and not Hispanic. Low-income respondents are unsatisfied with three aspects of Martin Way compared to 10 aspects for higher-income respondents. People of color were unsatisfied with five aspects compared with 10 for white, non-Hispanic respondents. Regardless of household income or race and ethnicity, the amount of trash or litter, sense of safety, and the level of crime continue to be aspects of greatest concern for Martin Way.

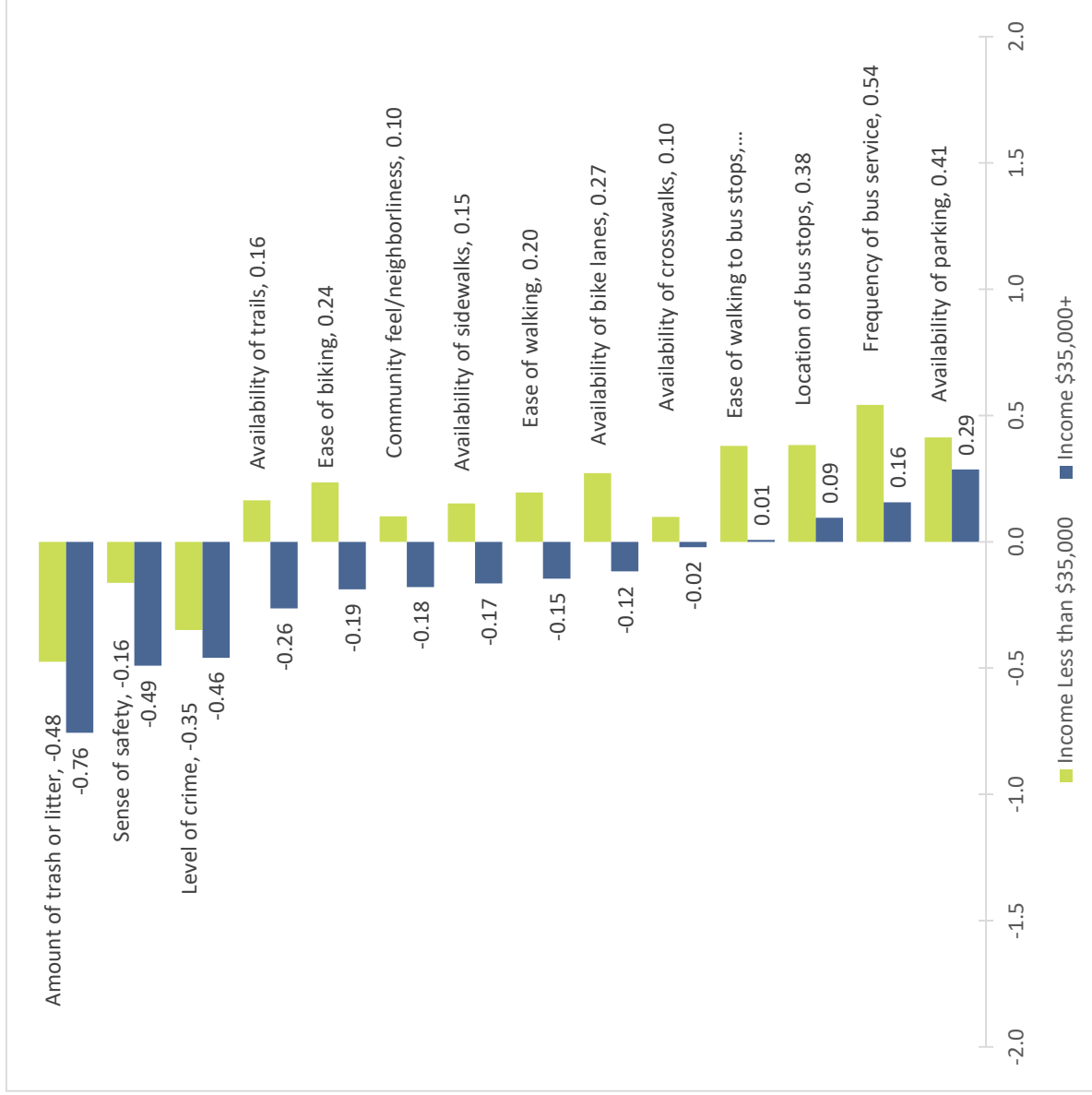


Figure 10. Comparing level of satisfaction between low- and higher-income respondents.

Martin Way Corridor Study
Residential Survey Summary

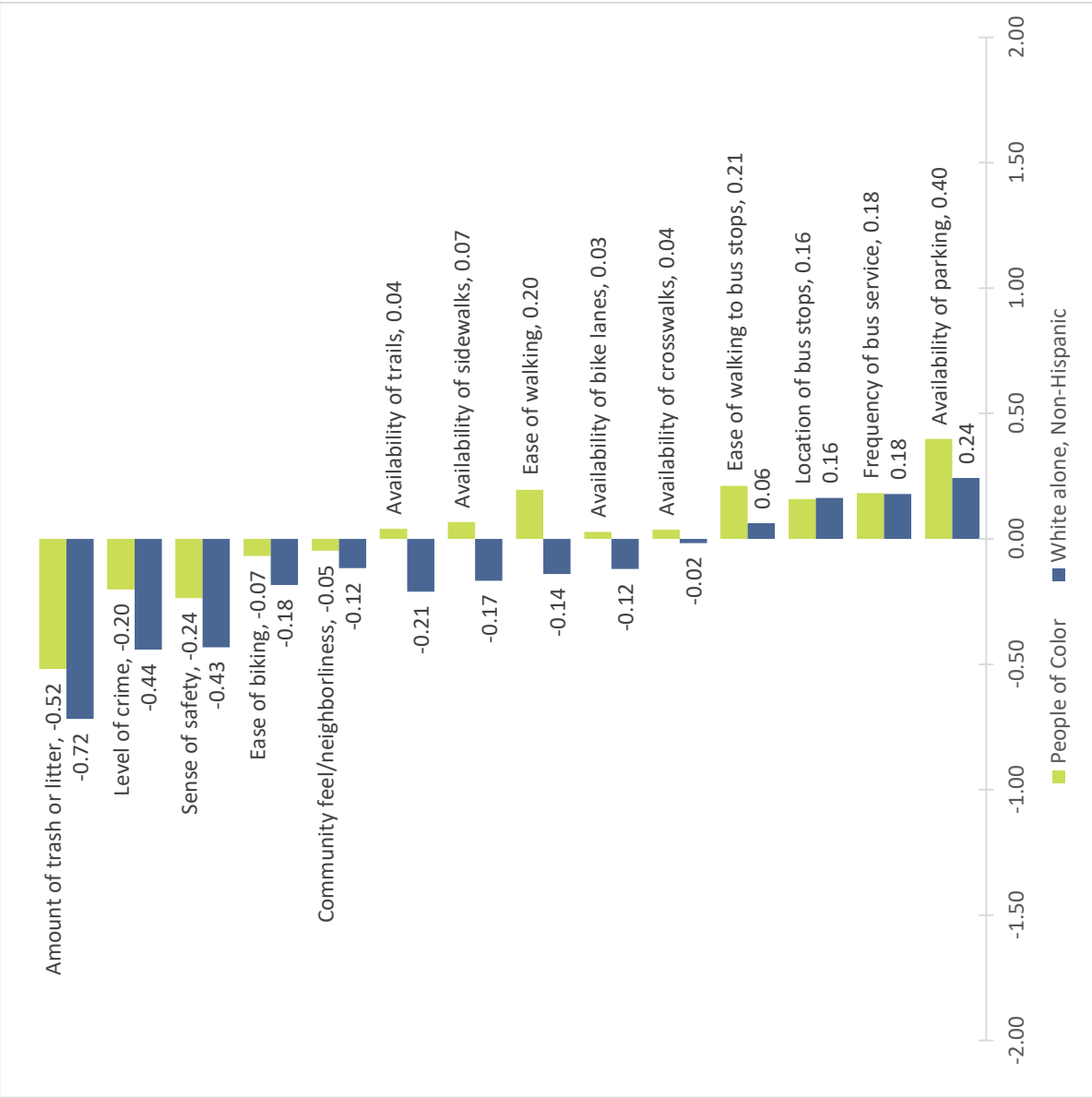


Figure 11. Comparing level of satisfaction between people of color and people who are white and not Hispanic

5. Transportation & Martin Way

Question 5 asked respondents about the frequency with which they traveled on Martin Way, focusing on what was typical before the COVID-19 pandemic (Table 10).

Table 10. How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?

To get to:		Survey	Daily	1-2 times a week	1-2 times a month	Infrequently	Never	Total	
Work	Residents		324	48	14	20	201	607	
	Non-Residents		378	66	21	33	111	609	
School	Residents		51	19	3	14	425	512	
	Non-Residents		15	5	2	22	419	463	
Big chain stores (Costco, Target, etc.)	Residents		106	412	117	34	6	675	
	Non-Residents		49	245	201	99	29	623	
Small businesses	Residents		93	337	138	67	13	648	
	Non-Residents		42	200	206	107	39	594	
I-5	Residents		238	241	88	60	28	655	
	Non-Residents		176	185	114	96	32	603	
Restaurants	Residents		53	263	201	116	18	651	
	Non-Residents		30	162	206	170	28	596	
Doctor appointments/ healthcare services	Residents		40	110	242	237	23	652	
	Non-Residents		25	64	206	232	74	601	
Other services (childcare, banks, etc.)	Residents		53	124	252	175	43	647	
	Non-Residents		32	70	143	183	138	566	
Total Respondents	Residents							707	
	Non-Residents							677	

Martin Way Corridor Study
Residential Survey Summary

In Figure 12, responses for each destination are weighted on a scale of 0 to 7 where 0 indicated the respondents never travelled Martin Way and 7 indicates they travelled Martin Way every day. Overall, nonresidents are more likely to travel Martin Way to get to work while residents are more likely to travel Martin Way for every other reason.

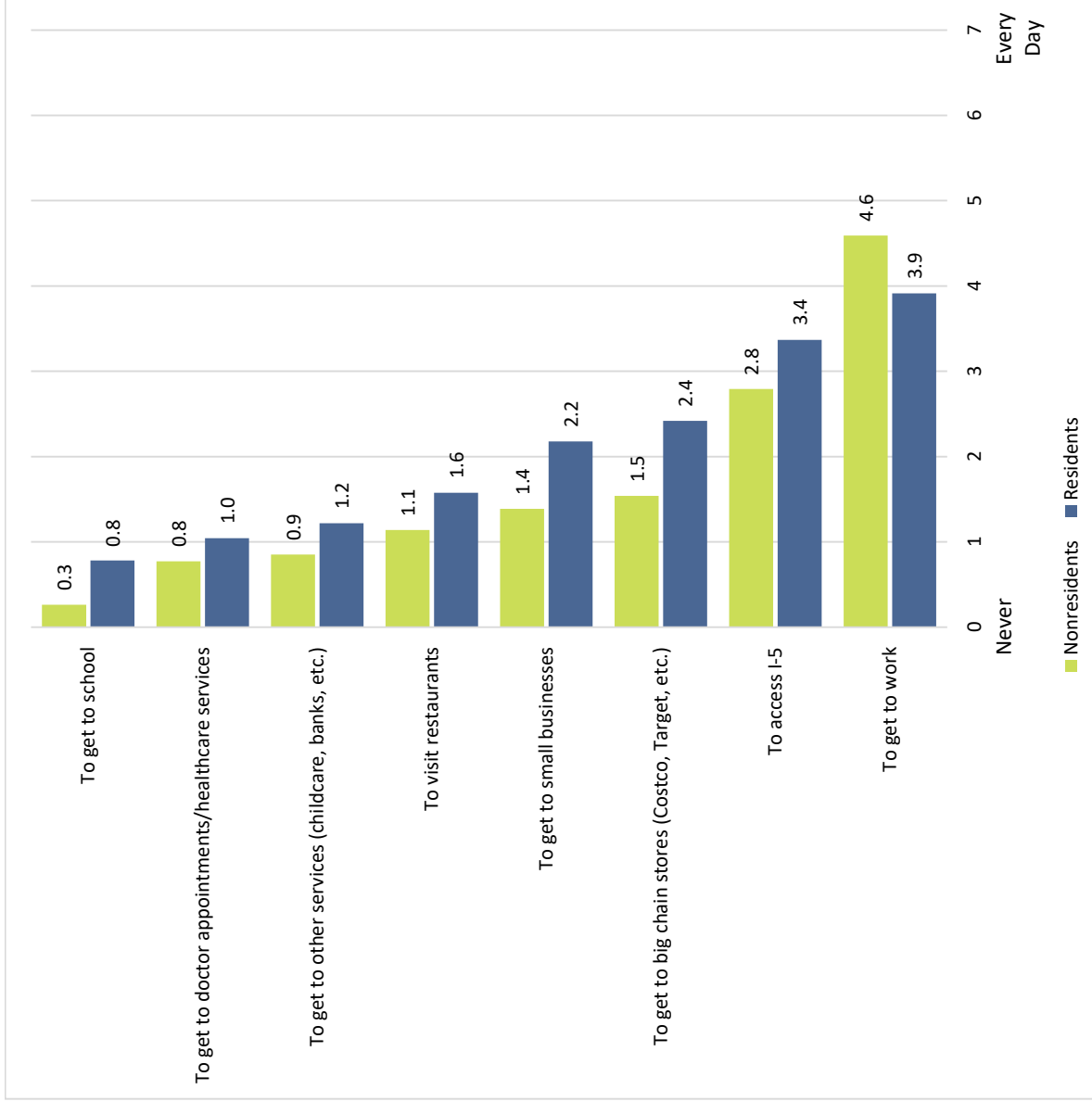


Figure 12. Purposes for travelling the Martin Way corridor

Martin Way Corridor Study Residential Survey Summary

Question 8 asked about the methods of transportation people use – and how frequently they use it (Table 11).

Table 11. Methods of travelling the Martin Way corridor

Q8. On average, how often do you use different methods of transportation along Martin Way?							
Method	Survey	Daily	1-2 times a week	1-2 times a month	Infrequently	Never	Total
Drive a private vehicle	Residents	473	210	33	25	54	795
	Non-Residents	320	166	68	42	30	626
Ride in a private vehicle (passenger)	Residents	79	188	104	169	136	676
	Non-Residents	36	125	113	152	97	523
Ride the bus	Residents	29	34	24	100	485	672
	Non-Residents	26	20	43	102	336	527
Bicycle	Residents	12	39	51	102	472	676
	Non-Residents	13	24	33	125	326	521
Walk	Residents	57	63	77	180	318	695
	Non-Residents	16	29	32	76	374	527
Use a mobility device (such as a wheelchair or walker)	Residents	18	5	9	25	590	647
	Non-Residents	3	1	0	6	489	499
Other (please specify)	Residents	5	1	3	14	211	234
	Non-Residents						42
Total Respondents	Residents						796
	Non-Residents						635

Martin Way Corridor Study
Residential Survey Summary

In Figure 13, responses for each mode of transportation were averaged and weighted on a scale of 0 to 7 where 0 indicated the respondents never use a specific mode of transportation and 7 indicates they use the mode of transportation every day. Overall, residents were slightly less likely to ride the bus or bicycle than nonresidents. Driving a private vehicle is by far the most common method of transportation along the Martin Way corridor, followed by being a passenger in a private car. For residents, walking is the third most common method of travel while nonresidents are more likely to ride the bus.

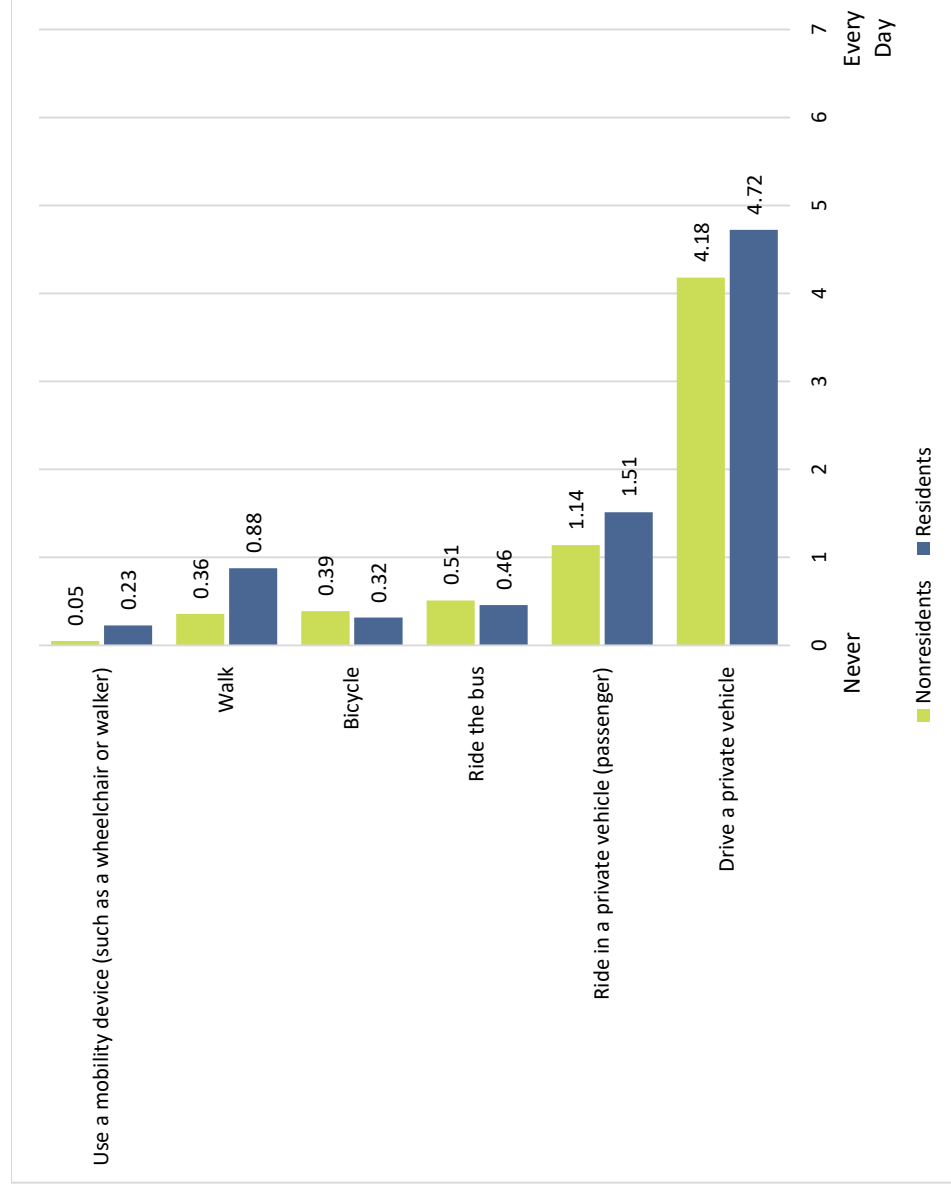


Figure 13. Frequency of travelling the Martin Way corridor by types of transportation

As discussed in Section 4 of this summary, Question 10 asked residents about their level of satisfaction with 14 aspects of the Martin Way corridor. Responses were reviewed to better understand differences based on how people travel.

- Frequent transit users (people who ride the bus daily or 1-2 times a week)
- Frequent walkers and mobility device users (people who walk or use a mobility device daily or 1-2 times a week)
- Frequent bicyclists (people who ride a bike daily or 1-2 times a week)

Martin Way Corridor Study Residential Survey Summary

In general, respondents were most satisfied with the availability of parking and frequency of bus service regardless of how they get around. The data shows the amount of trash or litter, sense of safety, and the level of crime on the corridor were consistently three of the greatest concerns regardless of how a respondent travels the corridor (Table 12). Responses differed on the two other issues that rounded out the top five concerns:

- For all respondents, the availability of trails and ease of biking
- For frequent transit users, the availability of crosswalks and ease of biking
- For frequent walkers and mobility device users, the availability of trails and ease of biking
- For frequent bicyclists, the availability of trails and ease of walking

Table 12. 5 Aspects of greatest concern by travel mode

Top 5 Concerns	All Responses	Frequent Transit Users	Frequent Walkers and Mobility Device Users	Frequent Bicyclists
1	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter
2	Sense of safety	Level of crime	Sense of safety	Availability of trails
3	Level of crime	Availability of crosswalks	Level of crime	Ease of walking
4	Availability of trails	Sense of safety	Availability of trails	Sense of safety
5	Ease of biking	Ease of biking	Ease of biking	Level of crime

Martin Way Corridor Study
Residential Survey Summary

6. Future of Martin Way

Question 11 asked respondents about what they feel is important as the community plans for the future of Martin Way. Responses were weighted on a scale of -2 to 2 where -2 indicates a topic is not important to the respondent and +2 indicates a topic is very important. Both residents and nonresidents indicate the following are some of the most importation issues to consider (Table 13):

- Improve safety for all users
- Move traffic quickly through the corridor with minimum delay
- Increase places to safely cross Martin Way
- Improve accessibility for people with disabilities

While residents feel improving street lighting along the corridor is also one of the top five issues to address, nonresidents are more interested in the development of a trail system.

Table 13. Top 5 outcomes for the planning process

Top 5 Priorities	Residents	Non-Residents
1	Improve safety for all users	Improve safety for all users
2	Move traffic quickly through the corridor with minimum delay	Increase places to safely cross Martin Way (for example: add crosswalks) Move traffic quickly through the corridor with minimum delay
3	Improve accessibility for people with disabilities	Improve accessibility for people with disabilities
4	Increase places to safely cross Martin Way (for example: add crosswalks)	Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations
5	Improve street lighting	

*Ranking is on a scale of -2 to 2 where -2 indicated a topic was not important to the respondent and +2 indicated a topic was very important.

Question 11 was also reviewed based on the respondents' household income and race and ethnicity when such information was provided (Tables 14 and 15, next page). The most important issues for respondents regardless of household income includes:

- Improving safety for all users
- Improving accessibility for people with disabilities
- Increasing places to safely cross Martin Way

Respondents with a household income less than \$35,000 were also more interested in improving street lighting and housing affordability. Respondents with a household income of \$35,000 or more were more interested in moving traffic quickly through the corridor with minimum delay and developing a trail system.

Martin Way Corridor Study Residential Survey Summary

Table 14. Top 5 outcomes for the planning process for respondents by income

Top 5 Priorities	Respondents with a household income of less than \$35,000	Respondents with a household income of \$35,000 or more
1	Improve safety for all users	Improve safety for all users
2	Improve accessibility for people with disabilities	Move traffic quickly through the corridor with minimum delay
3	Improve housing affordability	Increase places to safely cross Martin Way (for example: add crosswalks)
4	Improve street lighting	Improve accessibility for people with disabilities
5	Increase places to safely cross Martin Way (for example: add crosswalks)	Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations

*Ranking is on a scale of -2 to 2 where -2 indicated a topic was not important to the respondent and +2 indicated a topic was very important.

The most important issues for respondents regardless of race and ethnicity include:

- Improving safety for all users
- Moving traffic quickly through the corridor with minimum delay
- Increasing places to safely cross Martin Way
- Improving accessibility for people with disabilities

People of color were also interested in improving street lighting while people who are white alone were interested in developing a trail system.

Table 15. Top 5 outcomes for the planning process for respondents by race and ethnicity

Top 5 Priorities	People of Color [§]	People who are White, Non-Hispanic
1	Improve safety for all users	Improve safety for all users
2	Move traffic quickly through the corridor with minimum delay	Move traffic quickly through the corridor with minimum delay
3	Increase places to safely cross Martin Way (for example: add crosswalks)	Increase places to safely cross Martin Way (for example: add crosswalks)
4	Improve accessibility for people with disabilities	Improve accessibility for people with disabilities
5	Improve street lighting	Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations

[§]Includes those who are any race other than white alone and those who are Hispanic of any race.

*Ranking is on a scale of -2 to 2 where -2 indicated a topic was not important to the respondent and +2 indicated a topic was very important.

Martin Way Corridor Study
Residential Survey Summary

Appendix A. Surveys

Online Survey

thurston regional planning council

connecting communities
MARTIN WAY CORRIDOR

Martin Way Corridor Survey

Dear Neighbor,

We need your help to find ways to improve travel along Martin Way for everyone, including for people who drive, walk, bicycle, ride a bus, carpool or vanpool, or use a wheelchair or other mobility device.

Thurston County, the cities of Lacey and Olympia, and Intercity Transit would like your thoughts on the future of transportation and development along Martin Way. We're calling this the "Martin Way Corridor Study," and our study area is between Pacific Avenue and Marvin Road (see map - the numbers mark different sections of the corridor).

Please complete this survey by Wednesday, September 30, 2020.


Materials can be provided in alternate formats by contacting the Thurston Regional Planning Council at 360.956.7575 or email info@trpc.org.


1

1. Choose the answer that best matches your situation:

- I live on or near the Martin Way Corridor
- I own residential property on or near the Martin Way Corridor, but don't live there.
- I work on or near the Martin Way Corridor
- I don't live or work along the Martin Way Corridor, but I often travel on Martin Way

2

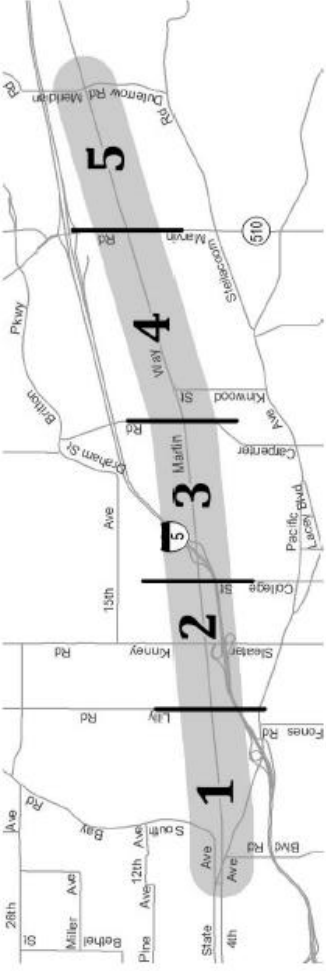




Martin Way Corridor Survey

Residential Survey

These questions apply to people who live on or near Martin Way.



2. Where do you live along the Martin Way Corridor (see map - choose closest area)?

- Section 1 - between Pacific Avenue and Lilly Road
- Section 2 - between Lilly Road and College Street
- Section 3 - between College Street and Carpenter Road
- Section 4 - between Carpenter Road and Marlin Road
- Section 5 - between Marlin Road and Dutlerow Road/Meridian Road

3. How long have you lived in your current location?

- Less than 1 year
- 1-2 years
- 2-3 years
- 3-4 years
- 4-5 years
- 5-10 years
- 10 or more years

4. My household:

- Rents our home
- Owns our home
- Lives with someone else
- Is unsheltered or unsheltered

5. Where do you work?

- At my home
- At a business or office located on the Martin Way Corridor
- At a business or office located elsewhere in Thurston County
- At Joint Base Lewis-McChord, active-duty military
- At Joint Base Lewis-McChord, civilian or contract position
- At a business or office located elsewhere in Pierce County
- At a business or office located somewhere else
- Retired
- Not employed

4

6. How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
To get to work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to big chain stores (such as Costco, Target, Home Depot, Best Buy)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to small businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To access I-5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To visit restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to doctor appointments or other healthcare services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to other services, like child care, financial services, personal care (hair and nail salons)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

7. What do you like most about living on or near Martin Way?

8. If you could do one thing to improve Martin Way, what would you do?

5

9. On average, how often do you use different methods of transportation along Martin Way?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
Drive a private vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ride in a private vehicle (passenger)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ride the bus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bicycle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use a mobility device (such as a wheelchair or walker)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)					

6

10. As a resident living near the Martin Way Corridor, tell us about the businesses and services you need, and how easy it is to get there.

	Very hard to get to	Moderately hard to get to	Neutral	Moderately easy to get to	Very easy to get to
Grocery stores/markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Convenience stores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specialty/ethnic markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pharmacies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parks, trails, and public places to enjoy nature and open space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospital and doctors' offices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coffee shops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fitness clubs or places to work out	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social services (such as unemployment office)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chain retailers (such as Target or Home Depot)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Different kinds of housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entertainment (movies, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Martin Way Corridor Study
Residential Survey Summary

11. As a resident living near the Martin Way Corridor, tell us how satisfied you are with aspects of the area.

	Very unsatisfied	Moderately unsatisfied	Neutral	Moderately satisfied	Very satisfied
Ease of walking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of sidewalks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of crosswalks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of biking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of bike lanes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of trails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Frequency of bus service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Location of bus stops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of walking to bus stops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Amount of trash or litter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sense of safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Level of crime	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of parking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community feel/neighborliness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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12. As we plan together for the Martin Way Corridor, what do you think is important?


	Not important	Less important	Neutral	Important	Very important	No opinion
Ensure there is a mix of different kinds of housing for young adults, families, and older adults	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase the amount of rental housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve housing affordability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase places to safely cross Martin Way (for example: add crosswalks)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve accessibility for people with disabilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bring new businesses and jobs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Faster bus service that comes more often	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve street lighting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Move traffic quickly through the corridor with minimum delay	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve safety for all users	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Add more landscaping and shade trees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase mix of businesses and services within walking distance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>


13. Is there anything we missed that you'd like us to know as we look at options for the Martin Way Corridor?

Martin Way Corridor Study
Residential Survey Summary



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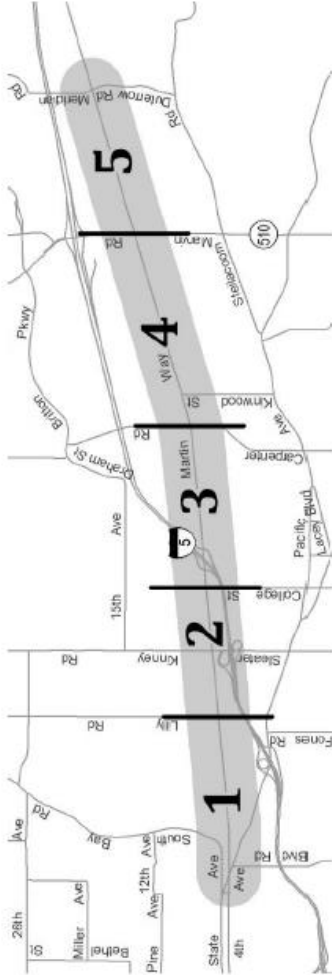


MARTIN WAY CORRIDOR

Martin Way Corridor Survey

Property Owner Survey

These questions apply to people who own property on or near the Martin Way Corridor, but do not live there.





14. Where do you own property along the Martin Way Corridor (see map - choose closest area)?

- Section 1 - between Pacific Avenue and Lily Road
- Section 2 - between Lily Road and College Street
- Section 3 - between College Street and Carpenter Road
- Section 4 - between Carpenter Road and Marvin Road
- Section 5 - between Marvin Road and Dutterow Road/Meridian Road
- I live outside the Martin Way Corridor, and don't own property there

15. How long have you owned property along Martin Way?

- Less than 1 year
- 1-2 years
- 2-3 years
- 3-4 years
- 4-5 years
- 5-10 years
- 10 or more years

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Martin Way Corridor Survey

General Survey

16. How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
To get to work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to big chain stores (such as Costco, Target, Home Depot, Best Buy)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to small businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To access I-5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To visit restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to doctor appointments or other healthcare services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To get to other services, like child care, financial services, personal care (hair and nail salons)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)					

17. What do you like most about Martin Way?

18. If you could do one thing to improve Martin Way, what would you do?

19. On average, how often do you use different methods of transportation along Martin Way?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
Drive a private vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ride in a private vehicle (passenger)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ride the bus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bicycle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use a mobility device (such as a wheelchair or walker)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>				

14

20. As we plan together for the Martin Way Corridor, what do you think is important?

	Not important	Less important	Neutral	Important	Very important	No opinion
Ensure there is a mix of different kinds of housing for young adults, families, and older adults	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase the amount of rental housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve housing affordability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase places to safely cross Martin Way (for example: add crosswalks)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve accessibility for people with disabilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bring new businesses and jobs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Faster bus service that comes more often	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve street lighting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Move traffic quickly through the corridor with minimum delay	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve safety for all users	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Add more landscaping and shade trees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase mix of businesses and services within walking distance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

21. Is there anything we missed that you'd like us to know as we look at options for the Martin Way Corridor?

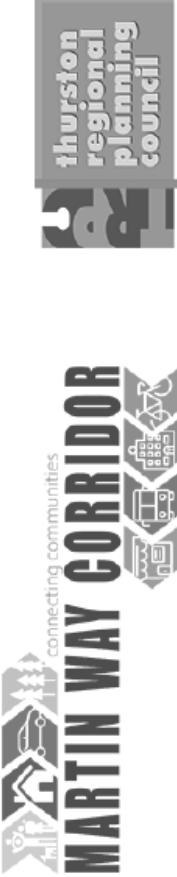
15

Martin Way Corridor Study
Residential Survey Summary



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MARTIN WAY CORRIDOR
connecting communities

thurston regional planning council

Martin Way Corridor Survey



Contact Info

22. Would you like to participate in other community planning activities for the Martin Way Corridor?

Yes

No

17



Martin Way Corridor Survey

Contact Information

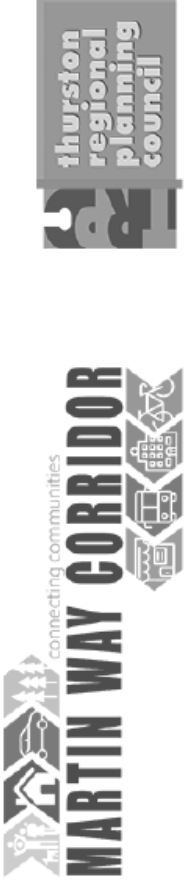
23. Please provide your email address so we can reach out to you. If you want to participate, but don't have email, please provide a phone number.

Full name:

Email address:

Phone number:

18



Martin Way Corridor Survey

Demographic Questions

Please help us understand more about who lives and works in the Martin Way Corridor by completing the following demographic section of this survey.

Thurston Regional Planning Council ensures full compliance with Title VI of the Civil Rights Act of 1964 by prohibiting discrimination against any person based on race, color, national origin, or sex in the provision of benefits and services resulting from its federally assisted programs and activities.

Information about your race, ethnicity, age, income, and/or gender that is provided voluntarily through this survey may be used to monitor TRPC's Title VI program.

24. What is your gender?

Female

Male

Other (please specify)

25. What is your age?

0-14

15-24

25-39

40-54

55-69

70-84

85 or older

26. What is your race/ethnicity (check as many as apply)?

American Indian & Alaska Native

Asian

Black/African American

Hispanic or Latino

Native Hawaiian & Pacific Islander

White

Other (please specify)

27. What is your household's annual income (before taxes)?

Less than \$14,999

\$15,000-\$24,999

25,000-\$34,999

\$35,000-\$49,000



\$50,000-\$74,999

\$75,000-99,999

\$100,000 or more

I don't know

20



Martin Way Corridor Survey

Thank you!

Thank you for taking this survey! You have helped us understand what is important to people who live on the Martin Way Corridor. You will have other chances to be a part of this project over the next year. If you have any questions or other comments, please visit www.trpc.org/martinway or contact Allison Osterberg at OsterbergA@trpc.org.

Print Survey



Dear Neighbor,

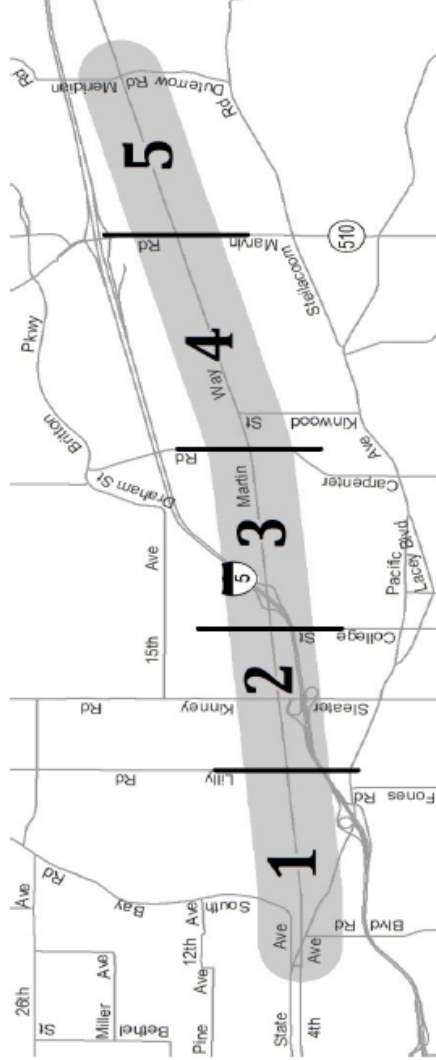
We need your help to find ways to improve travel along Martin Way for everyone, including people who drive, walk, bicycle, ride a bus, carpool or vanpool, or use a wheelchair or other mobility device.

Thurston County, the cities of Lacey and Olympia, and Intercity Transit would like your thoughts on the future of transportation and development along Martin Way. We're calling this the "Martin Way Corridor Study," and our study area is between Pacific Avenue and Marvin Road (see map).

Instructions:

- o Anyone in your household may complete this survey.
- o If more than one person wants to complete the survey, call TRPC at (360) 956-7575 to ask for more surveys.
- o Please answer the following questions for the study area shown on the map below.

Figure 1. Map of the Martin Way Corridor



Please return the completed survey(s) in the enclosed postage-paid envelope by **Wednesday, September 30**. You may also take this survey online by visiting the following website: www.trpc.org/martinway.

Queremos sus comentarios! Háganos saber si desea esta encuesta traducida en otro idioma que no sea inglés. Contact us at 360-956-7575 or info@trpc.org.

Chúng tôi muốn biết ý kiến của quý vị. Nếu quý vị muốn khảo sát này được dịch sang ngôn ngữ khác ngoài tiếng Anh, vui lòng cho chúng tôi biết. Contact us at 360-956-7575 or info@trpc.org.

여러분의 의견이 궁금합니다! 영어 이외의 언어로 번역된 설문지를 원하시면 저희에게 알려주세요. Contact us at 360-956-7575 or info@trpc.org.

To respond  or 



1) Where do you live along the Martin Way Corridor (see map on previous page – choose closest area)?

- Section 1 – between Pacific Avenue and Lilly Road
- Section 2 – between Lilly Road and College Street
- Section 3 – between College Street and Carpenter Road
- Section 4 – between Carpenter Road and Marvin Road
- Section 5 – between Marvin Road and Dutterow Road/Meridian Road
- I don't live along Martin Way Corridor, but own property there (also mark the section where your property is located)
- I live outside the Martin Way Corridor, and don't own property there

2) How long have you lived in your current location?

- Less than 1 year
- 1-2 years
- 2-3 years
- 3-4 years
- 4-5 years
- 5-10 years
- 10 or more years

3) My household:

- Rents our home
- Owns our home
- Lives with someone else
- Is unsheltered or unsheltered

4) Where do you work?

- At my home
- At a business or office located on the Martin Way Corridor
- At a business or office located elsewhere in Thurston County
- At Joint Base Lewis-McChord, active-duty military
- At Joint Base Lewis-McChord, civilian or contract position
- At a business or office located elsewhere in Pierce County
- At a business or office located somewhere else
- Retired
- Not employed

To respond: or





5) How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
To get to work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To get to school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To get to big chain stores (such as Costco, Target, Home Depot, Best Buy)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To get to small businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To access I-5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To visit restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To get to doctors' appointments or other healthcare services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To get to other services, like child care, financial services, personal care (hair and nail salons)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6) What do you like most about living on or near Martin Way?

7) If you could do one thing to improve Martin Way, what would you do?

To respond: or



8) On average, how often do you use different methods of transportation along Martin Way?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
Drive a private vehicle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ride in a private vehicle (passenger)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ride the bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bicycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use a mobility device (such as a wheelchair or walker)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other (please tell us about it)

9) As a resident living near the Martin Way Corridor, tell us about the businesses and services you need, and how easy it is to get there.

	Very hard to get to	Moderately hard to get to	Neutral	Moderately easy to get to	Very easy to get to
Grocery stores/markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenience stores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Specialty/ethnic markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pharmacies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks, trails, and public places to enjoy nature and open space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hospital and doctors' offices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coffee shops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fitness clubs or places to work out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social services (such as an unemployment office)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chain retailers (such as Target or Home Depot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Different kinds of housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affordable housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment (movies, etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>





10) As a resident living near the Martin Way Corridor, tell us how satisfied you are with aspects of the area.

	Very unsatisfied	Moderately unsatisfied	Neutral	Moderately satisfied	Very satisfied
Ease of walking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of sidewalks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of crosswalks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of biking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of bike lanes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of trails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequency of bus service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location of bus stops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of walking to bus stops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of trash or litter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sense of safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community feel/neighborliness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To respond: or



11) As we plan together for the Martin Way Corridor, what do you think is important?

	Not important	Less important	Neutral	Important	Very important	No opinion
Ensure there is a mix of different kinds of housing for young adults, families, and older adults	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase the amount of rental housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improve housing affordability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase places to safely cross Martin Way (for example: crosswalks)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improve accessibility for people with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bring new businesses and jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Faster bus service that comes more often	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improve street lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Move traffic quickly through the corridor with minimum delay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improve safety for all users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add more landscaping and shade trees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase mix of businesses and services within walking distance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12) Is there anything we missed that you'd like us to know as we look at options for the Martin Way Corridor?

13) Would you like to participate in other community planning activities for the Martin Way Corridor?

- Yes (be sure to leave your email address or other contact information)
 No

To respond: or





14) If you answered "Yes," please provide your full name and email address so we can reach you. If you want to participate, but don't have email, please provide your name and phone number.

Please help us understand more about who lives and works in the Martin Way Corridor by completing the following demographic section of this survey.

Thurston Regional Planning Council ensures full compliance with Title VI of the Civil Rights Act of 1964 by prohibiting discrimination against any person based on race, color, national origin, or sex in the provision of benefits and services resulting from its federally assisted programs and activities.

Information about your race, ethnicity, age, income, and/or gender that is provided voluntarily through this survey may be used to monitor TRPC's Title VI program.

Materials can be provided in alternate formats by contacting the Thurston Regional Planning Council at 360.956.7575 or email info@trpc.org.

15) What is your gender?

- Female
- Male
- Other

16) What is your race/ethnicity (check as many as apply)?

- American Indian & Alaska Native
- Asian
- Black/African American
- Hispanic or Latino
- Native Hawaiian & Pacific Islander
- White
- Other

To respond: or



17) What is your household's annual income (before taxes)?

- Less than \$14,999
- \$15,000-\$24,999
- \$25,000-\$34,999
- \$35,000-\$49,000
- \$50,000-\$74,999
- \$75,000-\$99,999
- \$100,000 or more
- I don't know

Thank you for taking this survey! You have helped us understand what is important to people who live on the Martin Way Corridor.

You'll have other chances to be a part of this project over the next year. If you have any questions or other comments, please visit <https://www.trpc.org/martinway> or contact Allison Osterberg at OsterbergA@trpc.org.

To respond: or



Appendix 2 Business Survey

Martin Way Corridor Survey Results

Submitted April 2021



Introduction and Acknowledgements

In June of 2020 the Thurston Regional Planning Council contracted with the Thurston Economic Development Council to conduct a survey of business perceptions of the Martin Way corridor. Survey elements included questions related to safety, methods of access, conditions of amenities and more. Survey responses will be used in long range planning efforts for Martin Way by Thurston County, The City of Olympia and The City of Lacey.

A 12 question survey was conducted within the Survey Monkey online platform and administered to businesses along 5 designated zones. The survey was administered primarily over the phone and was supported by email and in-person contact when necessary to capture responses.

This survey was conducted primarily in early 2021. As such, significant attention had to be given to the COVID-19 pandemic and survey methods were adjusted to accommodate the needs of businesses. Surveys were primarily conducted by phone to protect the safety of both the research staff and the respondents. Due to decreases in employee capacity, many businesses did not have the free time to participate in the survey and some opted to leave during the middle of the survey to attend to customer needs.

Special attention was given to accommodate businesses by scheduling surveys in multiple parts or allowing businesses to email their responses. In addition, respondents were offered the opportunity to be notified of COVID-19 support services available to businesses in Thurston County.

This survey could not have been successfully completed without the participation of the Thurston Regional Planning Council and their steering committee:

City of Olympia	Thurston County	Intercity Transit	Thurston Regional Planning Council
<ul style="list-style-type: none"> • Joyce Phillips • Sophie Stimson 	<ul style="list-style-type: none"> • Jennifer Davis • Leah Davis • Matt Unzelman • Becky Conn • Theresa Parsons 	<ul style="list-style-type: none"> • Eric Phillips • Mike Burnham • Rob LaFontaine 	<ul style="list-style-type: none"> • Allison Osterberg • Katrina Van Every • Aidan Dixon • Karen Parkhurst
<p>City of Lacey</p> <ul style="list-style-type: none"> • Rick Walk • Ryan Andrews • Martin Hoppe 			

Their guidance and suggestions were critical to preparing a survey instrument that met the needs of the project. Allison Osterberg of Thurston Regional Planning Council acted as the contract manager for this project and was critical to the success of the project. The research team consisted of Emily Gooding (Intern, Saint Martin's University), Julia Wojnar (Thurston EDC), Ryan Norskog (Thurston EDC) and was supervised by Gene Angel (Thurston EDC). Questions and comments on this document can be made to Gene Angel, Director of Research and Evaluation at the Thurston Economic Development Council.¹

Businesses Contacted

The Thurston Economic Development Council employed three survey methods to gather feedback for this project: in-person, email and telephone. The primary mechanism used to gather responses was by phone. In total, 80 businesses completed surveys meeting the project goal.

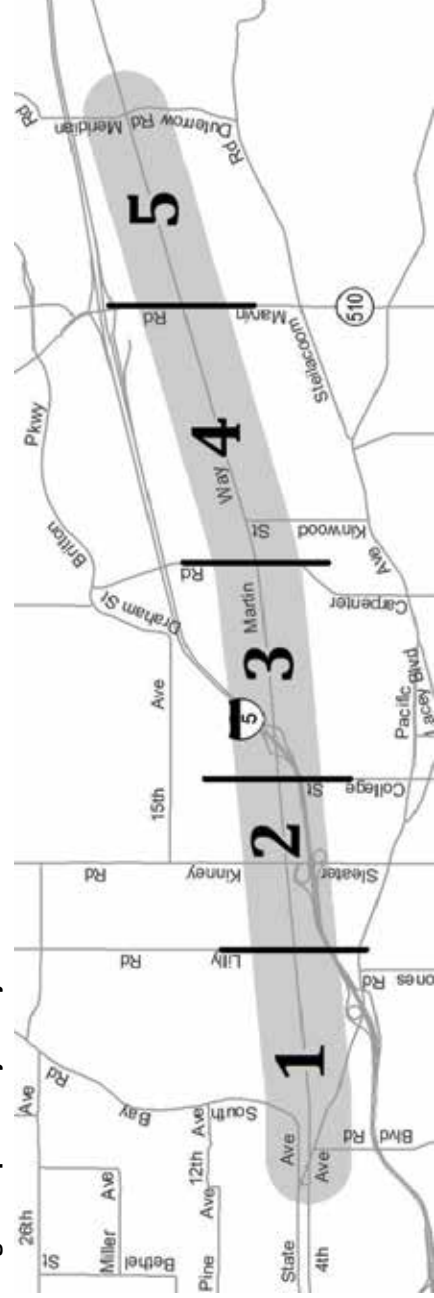
The Thurston Economic Development Council reached out to 450 businesses and received responses back from 80 representing an overall response rate of 17.78%. Businesses were surveyed between January 1st 2021 and March 3rd 2021.

Areas Represented

The survey area for this project is focused along the Martin Way corridor which winds its way through Olympia, WA and Lacey, WA in Thurston County. Businesses eligible to participate in this survey must be located on or near the Martin Way corridor in one of the five designated zones:

Zone 1 is defined as the area of Martin Way between Pacific Avenue and Lilly Road. Zone 2 is defined as the area between Lilly Road and College Street. Zone 3 is defined as the area between College Street and Carpenter Road. Zone 4 is defined as the area between Carpenter Road and Marvin Road. Zone 5 is defined as the area between Marvin Road and Meridian Road.

Image 1: Map of Survey Area by Zone



Business Characteristics

Business characteristics of industry, size and age were generally well represented throughout zones 1-5. The typical business represented in this survey was a small business with less than 10 full-time employees, operates in the retail trade industry and has been operating for less than 40 years.

Industry Representation

In total, 80 businesses were surveyed for this project with Retail Trade (NAICS 44-45) being the far and away most common respondent at 30. The next most represented industry sector was Accommodation and Food Services (NAICS 72) with 9 respondents.

When comparing distributions between responses and the business census² we find that Retail Trade represents approximately 38% of all respondents while only representing 17% of the general business activity along the corridor. This overrepresentation in Retail Trade might be explained by virtue of retail businesses being more capable of responding to survey requests rather when compared to the Health Care sector which was underrepresented at just 7.5% of total respondents compared against 15% of the total business population along the corridor.

¹ Email Gene Angel at gangel@thurstonedc.com

² The business census for this report was created using the ZoomProspector tool, a GIS based business analytics database that pulls business records geographically by NAICS. A full copy of this census has been given to the Thurston Regional Planning Council with this report.

Table 1: Industry Distribution of Respondents, by Zone

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total	% Total
Agriculture, Forestry, Fishing and Hunting	0	0	0	0	0	0	0.0%
Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0.0%
Utilities	0	0	0	0	0	0	0.0%
Construction	1	0	0	2	0	3	3.8%
Manufacturing	1	0	0	1	0	2	2.5%
Wholesale Trade	1	0	1	3	0	5	6.3%
Retail Trade	4	4	2	16	4	30	37.5%
Transportation and Warehousing	0	1	0	0	0	1	1.3%
Information	0	0	0	0	0	0	0.0%
Finance and Insurance	0	4	2	1	0	7	8.8%
Real Estate and Rental and Leasing	0	0	0	0	1	1	1.3%
Professional, Scientific, and Technical Services	1	0	1	3	1	6	7.5%
Management of Companies and Enterprises	0	0	0	0	0	0	0.0%
Administrative and Support and Waste Management...	0	0	0	0	0	0	0.0%
Educational Services	0	1	0	1	0	2	2.5%
Health Care and Social Assistance	1	4	0	0	1	6	7.5%
Arts, Entertainment, and Recreation	0	0	0	0	0	0	0.0%
Accommodation and Food Services	0	4	2	2	1	9	11.3%
Other Services (except Public Administration)	3	0	1	3	1	8	10.0%
Public Administration	0	0	0	0	0	0	0.0%
All Industries	12	18	9	32	9	80	100.0%

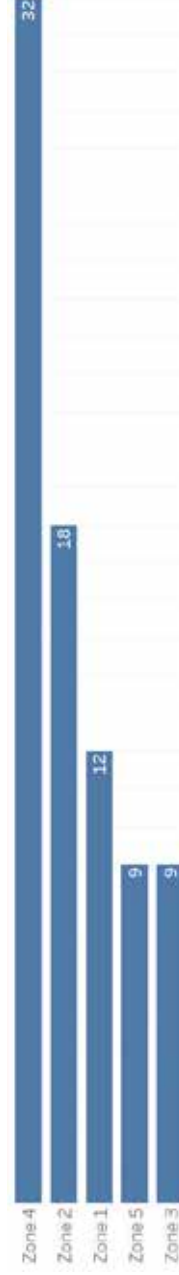
Table 2: Industry Distribution Business Census, by Zone

Description	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total	% Total
Agriculture, Forestry, Fis..	0	0	1	0	0	1	0.10%
Mining, Quarrying, and Oi..	0	1	0	0	0	1	0.10%
Utilities	1	0	0	0	0	1	0.10%
Construction	6	13	4	10	10	43	4.21%
Manufacturing	3	7	0	10	0	20	1.96%
Wholesale Trade	4	9	1	9	2	25	2.45%
Retail Trade	21	57	9	69	22	178	17.42%
Transportation and Ware..	2	2	0	1	2	7	0.68%
Information	1	6	3	8	2	20	1.96%
Finance and Insurance	6	31	3	9	16	65	6.36%
Real Estate and Rental an..	10	17	2	10	18	57	5.58%
Professional, Scientific, a..	9	39	1	12	14	75	0.00%
Management of Companie..	0	0	0	0	0	0	0.03%
Administrative and Suppo..	4	11	1	10	5	31	3.03%
Educational Services	3	9	2	11	4	29	2.84%
Health Care and Social As..	25	85	1	22	20	153	14.97%
Arts, Entertainment, and ..	1	5	0	4	2	12	1.17%
Accommodation and Food..	8	40	9	43	24	124	12.13%
Other Services (except Pu..	34	33	3	61	17	148	14.48%
Public Administration	9	8	10	5	0	32	3.13%
All Industries	147	373	50	294	158	1,022	100.00%

Distribution of Responses within Zones

Every zone in the survey received at least 9 responses with Zone 4 having the highest concentration at 32.

Graph 1: Distribution of Business Responses (by Zone)



Business Size

The employee counts of businesses represented in this survey were generally small, with 74.3% of all respondents indicating they employed 10 or fewer full-time employees. In general, the size of the businesses surveyed were consistent with the general representation of business size within the region.

For example, nearly 75% of respondents indicated their business had 10 or fewer FTEs. The general business census of the area showed an exactly equal proportion of businesses with fewer than 10 FTEs at 75% of the total.

Graph 2: Overall FTEs, All Respondents



Table 3: Overall FTEs, All Respondents

	Less than 5	5 To 10	11 To 15	16 To 20	Greater than 20	Totals
Zone 1	27%	55%	9%	9%	0%	11
Zone 2	31%	13%	13%	13%	31%	16
Zone 3	13%	88%	0%	0%	0%	8
Zone 4	42%	35%	16%	3%	3%	31
Zone 5	33%	56%	0%	11%	0%	9
All Zones	33%	41%	11%	7%	8%	75

Table 4: Overall FTEs, Business Census

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total	% Total
1 to 4	84	187	13	164	97	545	51.5%
5 to 9	41	96	11	64	37	249	23.5%
10 to 19	13	41	11	46	10	121	11.4%
20 to 49	8	41	11	20	11	91	8.6%
50 to 99	5	14	3	6	1	29	2.7%
100 to 249	2	9	1	3	5	20	1.9%
250 to 499	1	1	0	1	0	3	0.3%
500 to 999	0	0	1	0	0	1	0.1%
Total	154	389	51	304	161	1,059	100.0%

Business Age

Business age was relatively evenly distributed amongst the selections. The most common selection with 24.7% of the total was 0-5 years in business. The next most represented category was 11-20 years in business at 23.3% of the total.

Graph 3: Years in Business, All Respondents



Table 5: Years in Business, All Respondents

Years in Business	Percentages	Total Responses
0 to 5	24.7%	18
6 to 10	21.9%	16
11 to 20	23.3%	17
21 to 40	21.9%	16
Greater than 40	8.2%	6
Totals	100.0%	73

Survey Results

Q1: Please choose whether or not the following items are currently working well for your business.

Question 1 is a multifaceted question that asked respondents to rank how certain elements along Martin Way are currently meeting the needs of their business. Respondents were asked to choose between one of three options:

- Working well for my business (highest)
- Neutral
- Needs Improvement (lowest)

Businesses were asked to choose the above options across 14 different elements relating to the Martin Way corridor. The full list of elements is as follows:

- Access by car to business from Martin Way
- Access by car from business to Martin Way (eg left turns)
- Access by bicycle
- Pedestrian access (sidewalks, walkways)
- Access by bus
- Amount of parking
- Location or layout of parking
- Lighting
- Landscaping
- Traffic conditions on Martin Way
- Amenities such as parks or paths
- Access for persons with disability
- Nearby housing
- Overhead cost

Q1.1 Access by car to business from Martin Way

“Working well” was the most commonly selected option across all zones. Respondents in Zone 2 were most likely to select working well for their business when compared to other zones at 66.7%. Of businesses that selected “Needs Improvement”, Zone 3 had the highest concentration at 33.3%.

Graph 4: Access by Car to Business from Martin Way



Table 6: Access by Car to Business from Martin Way

	Needs Improvement	Neutral	Working well	Total Responses
Zone 1	25.0%	16.7%	58.3%	12
Zone 2	27.8%	5.6%	66.7%	18
Zone 3	33.3%	11.1%	55.6%	9
Zone 4	15.6%	28.1%	56.3%	32
Zone 5	22.2%	11.1%	66.7%	9
All Zones	22.5%	17.5%	60.0%	80

Q1.2 Access by car to Martin Way from Business (eg left turn safety)

Respondents identified left turn safety as a need for improvement across all zones and was the most common response across a majority of zones. The highest rating for left turn safety came from Zone 1 where 58.3% indicated it was “working well”. Zones 3 and 5 represented the areas where responses most indicated the need for improvement with 55.6% of respondents selecting “needs improvement”.

Graph 5: Access by car from business to Martin Way



Table 7: Access by car from business to Martin Way

Zone	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	33%	8%	58%	12
Zone 2	39%	22%	39%	18
Zone 3	56%	11%	33%	9
Zone 4	41%	25%	34%	32
Zone 5	56%	11%	33%	9
All Zones	43%	19%	39%	80

Q1.3 Access by bicycle

“Working well” was the most represented selection across all zones and highest in Zone 5 at 77.8%. Zone 5 had the highest concentration of businesses that selected “needs improvement” at 22.2%

Graph 6: Access by Bicycle

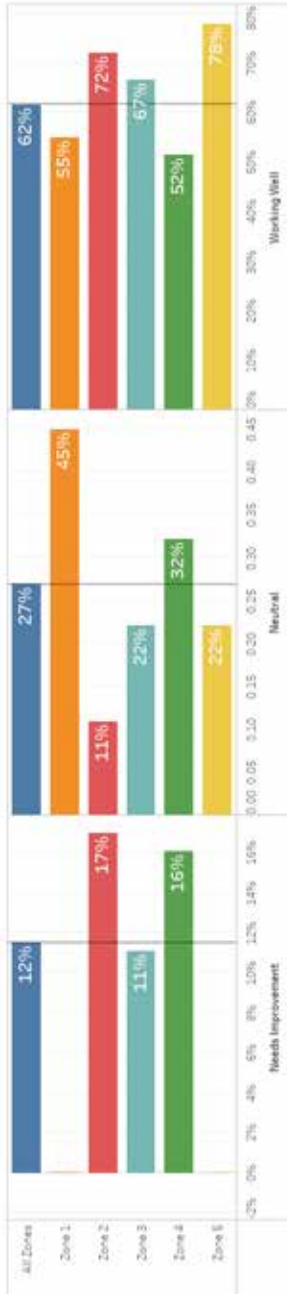


Table 8: Access by Bicycle

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	0%	45%	55%	11
Zone 2	17%	11%	72%	18
Zone 3	11%	22%	67%	9
Zone 4	16%	32%	52%	31
Zone 5	22%	22%	78%	9
All Zones	12%	27%	62%	78

Q1.4 Access by Pedestrian

Businesses in all zones indicated that pedestrian access was working well for their business. The highest satisfaction rating was in Zone 1 with 91.7% selecting “working well”. The most dissatisfied zones were Zones 2 and 3 with both having 22.2% selecting “needs improvement”.

Graph 7: Access by Pedestrians

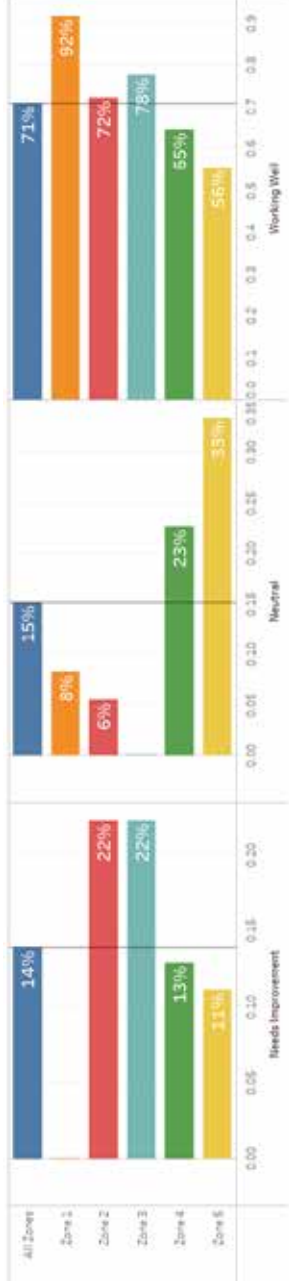


Table 9: Access by Pedestrians

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	0%	8%	92%	12
Zone 2	22%	6%	72%	18
Zone 3	22%	0%	78%	9
Zone 4	13%	23%	65%	31
Zone 5	11%	33%	56%	9
All Zones	14%	15%	71%	79

Q1.5 Access by Bus

The majority of zones responded that access by bus was working well for their business. The zone with the highest satisfaction was Zone 1 with 91.7% selecting “working well”. The zone with the highest dissatisfaction was Zone 5 with 44.4% selecting “needs improvement”.

Graph 8: Access by Bus

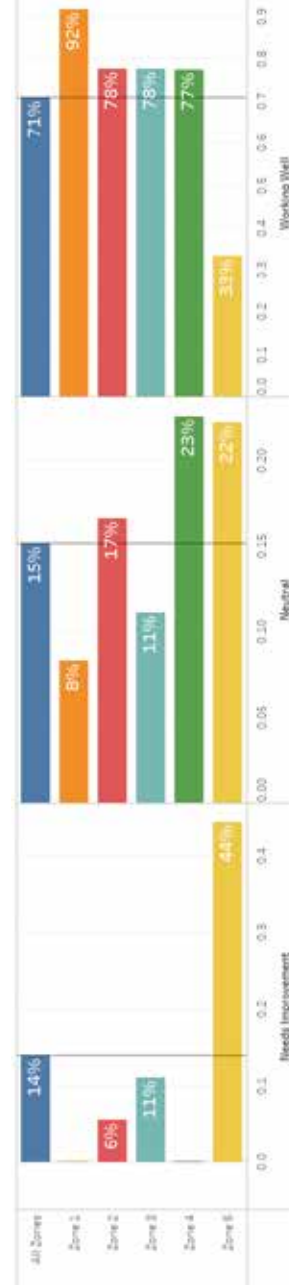


Table 10: Access by Bus

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	0%	8%	92%	12
Zone 2	6%	17%	78%	18
Zone 3	11%	11%	78%	9
Zone 4	0%	23%	77%	31
Zone 5	44%	22%	33%	9
All Zones	14%	15%	71%	79

Q1.6 Amount of Parking

Respondents indicated that the amount of parking available to them was working well in all of the zones surveyed. The highest concentration of positive responses was in Zone 3 with 88.9% selecting “working well” and the highest concentration of negative responses was in Zone 1 with 33.3% selecting “needs improvement”.

Graph 9: Amount of Parking

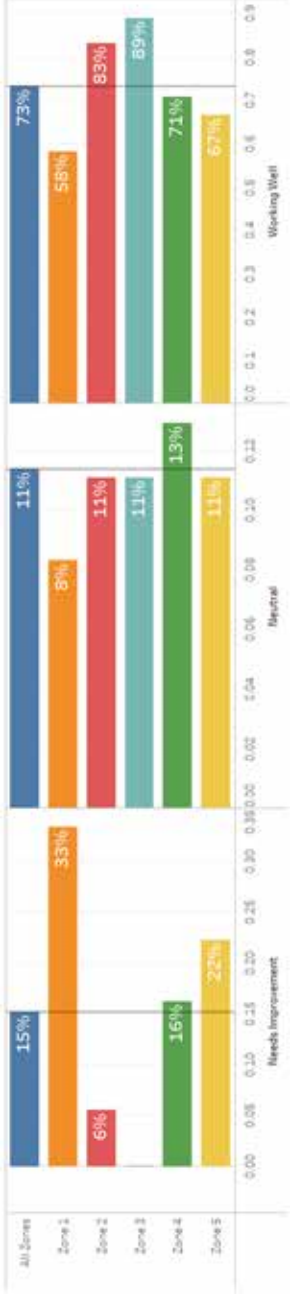


Table 11: Amount of Parking

Zone	Needs			Total Responses
	Improvement	Neutral	Working Well	
Zone 1	33%	8%	58%	12
Zone 2	6%	11%	83%	18
Zone 3	0%	11%	89%	9
Zone 4	16%	13%	71%	31
Zone 5	22%	11%	67%	9
All Zones	15%	11%	73%	79

Q1.7 Location and Layout of Parking

The majority of respondents in each zone indicated that parking location and layout were working well for their business. The highest concentration of positive responses was located within Zone 2 at 72.2%. The highest concentration of negative responses were tied between Zones 1 and 2 with 16.7% in each selecting “needs improvement”.

Graph 10: Location and Layout of Parking

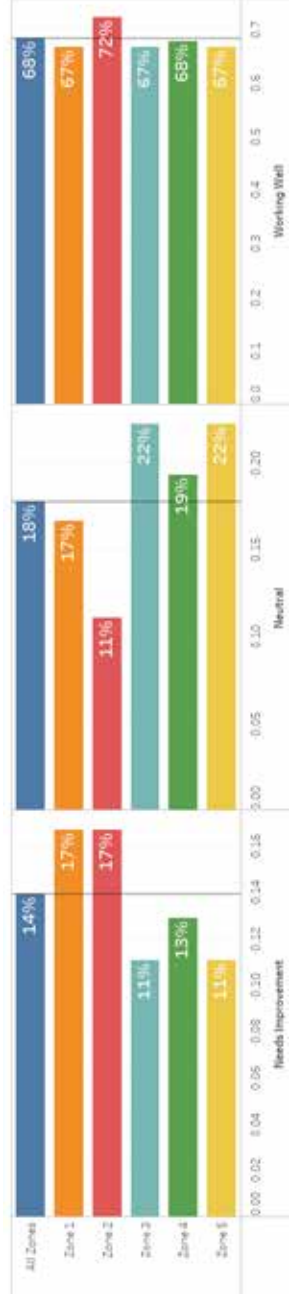


Table 12: Location and Layout of Parking

Zones	Needs			Total Responses
	Improvement	Neutral	Working Well	
Zone 1	17%	17%	67%	12
Zone 2	17%	11%	72%	18
Zone 3	11%	22%	67%	9
Zone 4	13%	19%	68%	31
Zone 5	11%	22%	67%	9
All Zones	14%	18%	68%	79

Q1.8 Quality of Lighting

The majority of respondents indicated that the quality of lighting was working well for their business with 4 out of 5 zones indicating that as their primary selection. The highest concentration of positive responses was within Zone 2 with 61.1% selecting “working well” and the highest concentration of negative responses was located with Zone 1 with 41.7% selecting “needs improvement”.

Graph 11: Quality of Lighting

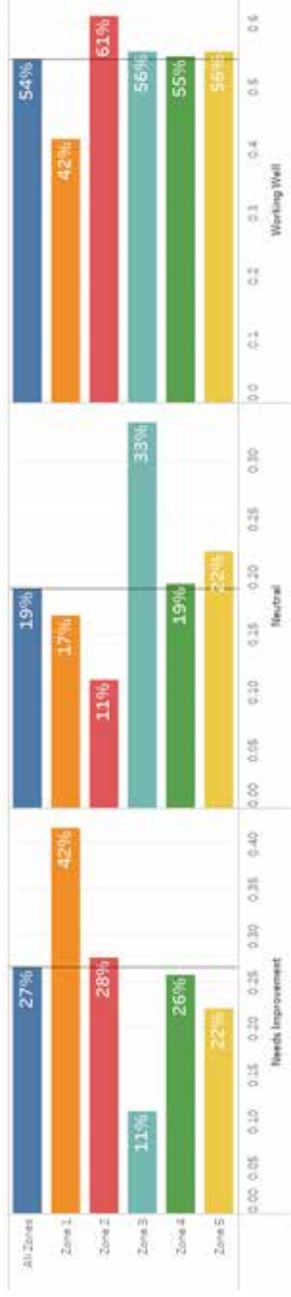


Table 13: Quality of Lighting

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	42%	17%	42%	12
Zone 2	28%	11%	61%	18
Zone 3	11%	33%	56%	9
Zone 4	26%	19%	55%	31
Zone 5	22%	22%	56%	9
All Zones	27%	19%	54%	79

Q1.9 Quality of Landscaping

The majority of respondents indicated that the quality of landscaping was working well for their business. The highest concentration of positive responses were in Zone 2 where 61.1% of respondents selected that landscaping was “working well”. The highest concentration of negative responses were located in Zone 3 where 44.4% indicated that landscaping “needs improvement”.

Graph 12: Quality of Landscaping



Table 14: Quality of Landscaping

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	17%	42%	42%	12
Zone 2	22%	17%	61%	13
Zone 3	44%	11%	44%	9
Zone 4	26%	19%	55%	31
Zone 5	22%	33%	44%	9
All Zones	30%	26%	45%	74

Q1.10 Traffic Conditions

Respondents were split on their perception of traffic conditions, but most zones indicated that traffic conditions were an issue. The highest concentration of positive responses were located within Zone 1 with 91.7% indicating traffic conditions were “working well”. The highest concentration of negative responses were from Zone 2 where 38.9% indicated that traffic conditions “need improvement”.

Graph 13: Traffic Conditions

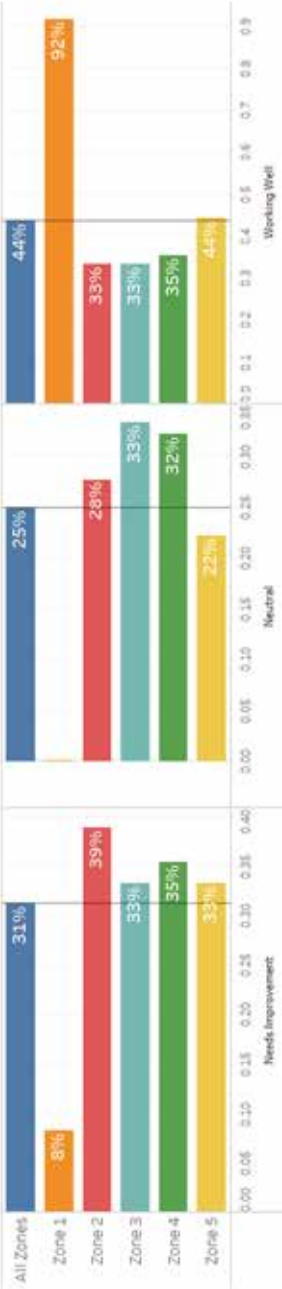


Table 15: Traffic Conditions

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	8%	0%	92%	12
Zone 2	39%	28%	33%	18
Zone 3	33%	33%	33%	9
Zone 4	35%	32%	35%	32
Zone 5	33%	22%	44%	9
All Zones	31%	25%	44%	80

Q1.11 Parks and Paths

Respondents were primarily neutral when considering the condition of parks and paths provided along Martin Way. Zone 2 contained both the highest concentration of positive and negative perceptions with 33.3% indicating they were “working well” and 38.9% indicated “needs improvement”.

Graph 14: Parks and Paths

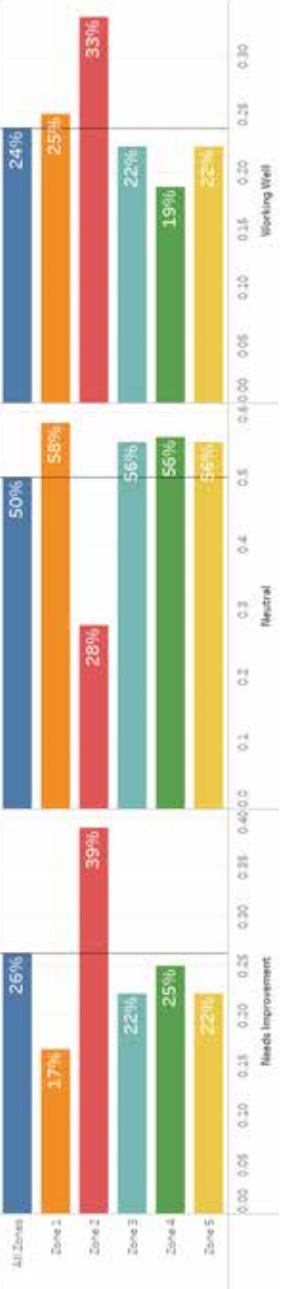


Table 16: Parks and Paths

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	17%	58%	25%	12
Zone 2	39%	28%	33%	18
Zone 3	22%	56%	22%	9
Zone 4	25%	56%	19%	32
Zone 5	22%	56%	22%	9
All Zones	26%	50%	24%	80

Q1.12 Access for Persons with Disability

Respondents indicated that access for persons with disability was working well for their business across all surveyed zones. The highest concentration of positive feedback was located in Zone 1 with 75% of respondents selecting “working well”. The highest concentrations of negative responses were located within Zones 3 and 4 with 11.1% selecting “needs improvement”.

Graph 15: Access for Persons with Disability

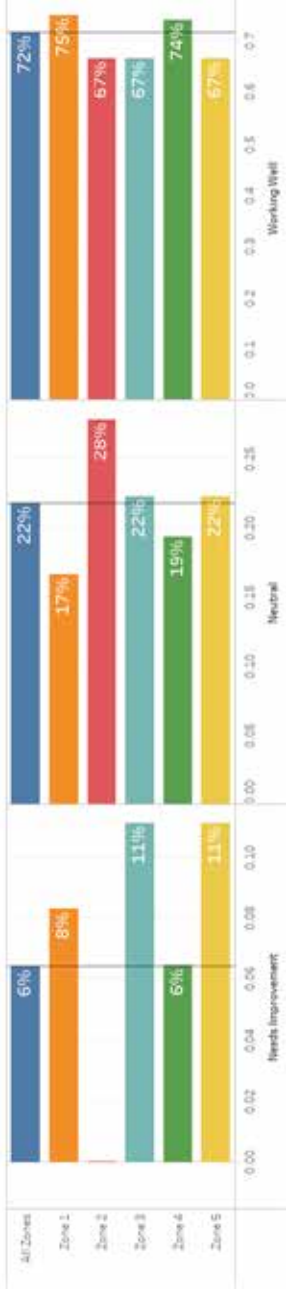


Table 17: Access for Persons with Disability

Zone	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	8%	17%	75%	12
Zone 2	0%	28%	67%	17
Zone 3	11%	22%	67%	9
Zone 4	6%	19%	74%	31
Zone 5	11%	22%	67%	9
All Zones	6%	22%	72%	78

Q1.13 Housing Nearby

Respondents were primarily neutral when assessing the nearby housing stock.

Graph 16: Housing Nearby

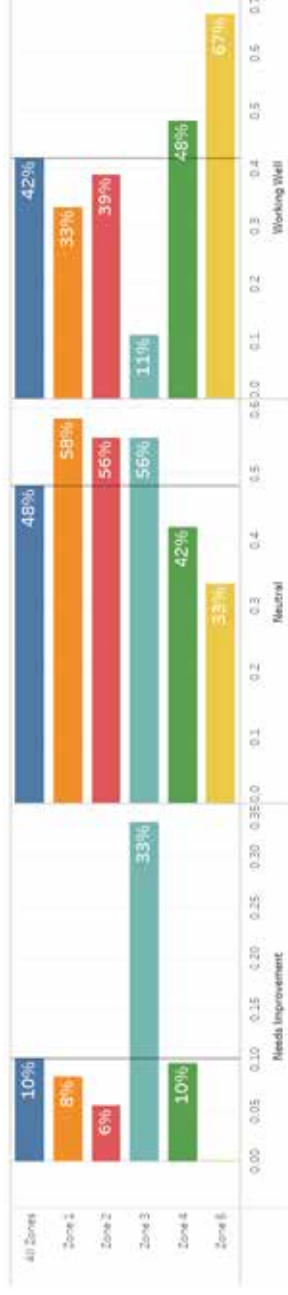


Table 18: Housing Nearby

Zone	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	8%	58%	33%	12
Zone 2	6%	56%	39%	18
Zone 3	33%	11%	48%	9
Zone 4	10%	42%	48%	31
Zone 5	0%	33%	67%	9
All Zones	10%	48%	42%	79

Q1.14 Overhead Costs

Respondents were primarily neutral about the condition of overhead costs. The zone with the highest concentration of positive responses was Zone 1 with 41.7% indicating overhead costs were “working well”. The highest concentration of negative responses was Zone 5 where 22.2% indicated that overhead costs “need improvement”.

Graph 17: Overhead Costs

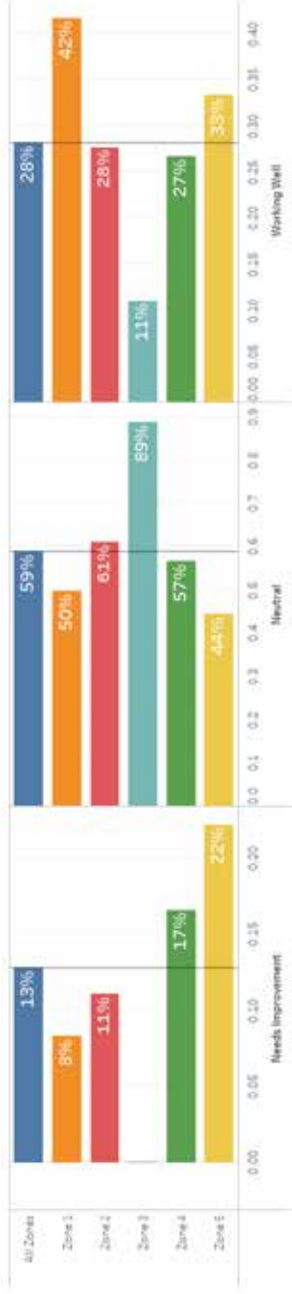


Table 19: Overhead Costs

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	8%	50%	42%	12
Zone 2	11%	61%	28%	18
Zone 3	0%	89%	11%	9
Zone 4	17%	57%	27%	30
Zone 5	22%	44%	33%	9
All Zones	13%	59%	28%	78

Q1.15 Open Response: Items Needing Improvement

Respondents were asked to provide clarity on why they selected “needs improvement” in the questions above. General themes for each zone are detailed below. A full list of responses can be found in Appendix 1.

Zone 1 Themes

A main concern for businesses in this zone was the safety of driving on Martin Way with many businesses commenting that they did not feel safe turning right or left onto Martin Way due to traffic conditions. Traffic accidents are mentioned as common and contribute to a general feeling of poor access to and from their businesses.

Respondents indicated concern over the amount of lighting and expressed a desire to see additional lighting on the street itself.

Homelessness was a consistent theme across all zones and many businesses expressed concerns of safety and blight around their businesses.

Access to parking was commonly mentioned with several businesses commenting that their access to parking was limited for the customers and their employees.

Zone 2 Themes

The most commonly represented concern by respondents was concern about the safety of left turns and the poor condition of traffic, generally. Many businesses expressed that their businesses are unsafe to enter for customers arriving by foot or bicycle and that car accidents are common.

Some businesses represented concerns about the availability of lighting and parks and pathways near their business.

Zone 3 Themes

The most common concern respondents had was related to traffic safety and access to and from their business. Several businesses indicated that traffic conditions along Martin Way simply do not allow for left turns to be conducted safely.

Homelessness, the quality of bike lanes and pedestrian paths were mentioned, but did not represent a significant portion of open responses in this zone.

Zone 4 Themes

Poor lighting and landscaping were consistently represented by respondents within this zone and some businesses were able to connect lack of proper lighting to safety concerns.

Road safety was the most commonly represented concern with traffic conditions and difficult left-turns mentioned most frequently. Many businesses feel that entering and exiting their development itself poses a significant danger to themselves and their customers.

Some businesses mentioned their desire for additional parks and pathways and dislike the general blight of the area.

Zone 5 Themes

Access by bus was represented as concern with some businesses mentioning that their business is poorly served by the bus.

Lighting and landscaping concerns were represented, but not uniformly across all respondents.

Traffic conditions and left-turn safety were the most commonly represented concerns. Traffic is seen as “bad” and a significant cause of concern for employee and customer safety.

Q2: Size of Business

The vast majority of businesses surveyed were small businesses with FTE counts of less than 10. Zone 3 represented the highest concentration of small business responses with 100% of all respondents indicating they had 10 or fewer employees.

Graph 18: Number of FTEs, All Respondents by Zone



Table 20: Number of FTEs

	Less than 5	5 To 10	11 To 15	16 To 20	Greater than 20	Totals
Zone 1	27%	55%	9%	9%	0%	11
Zone 2	31%	13%	13%	13%	31%	16
Zone 3	13%	88%	0%	0%	0%	8
Zone 4	42%	35%	16%	3%	3%	31
Zone 5	33%	56%	0%	11%	0%	9
All Zones	33%	41%	11%	7%	8%	75

Q3 Years located on Martin Way

Respondent business age was varied across zones with no clear category dominating overall.

Graph 19: Age of Business



Table 21: Age of Business

	0 To 5	11 To 20	21 - 40	6 To 10	Greater than 40	Totals
Zone 1	33%	25%	17%	8%	17%	12
Zone 2	13%	19%	31%	38%	0%	17
Zone 3	13%	13%	13%	38%	25%	8
Zone 4	34%	24%	21%	17%	3%	29
Zone 5	13%	38%	25%	13%	13%	8
All Zones	26%	23%	22%	22%	8%	74

Q4 Open Response: Why did you originally locate your business on Martin Way?

Respondents were asked in an open response to explain why their business was originally located along Martin Way. A collection of general themes by zone are presented below. The full list of responses is included in Appendix 1.

Zone 1 Themes

The most commonly represented response was that no strong reason was responsible for locating their business in this area or that their location choice was unknown.

The next most common reason was the land or building available was suited to the needs of the business. Traffic flow and access to I-5 was mentioned by a minority of respondents

Zone 2 Themes

The most common response within Zone two was related to location. Many businesses indicated they chose to locate their business in this area of Martin Way due to proximity to I-5, drive by traffic, to have access to state workers and be near the hospital.

Zone 3 Themes

The majority of respondents Zone 3 opted not to answer this question, but those who did mentioned visibility from the road and building availability as a primary reason.

Zone 4 Themes

The most commonly represented reason for locating their business in this area was related to visibility and the highly trafficked street.

Some respondents mentioned they wanted to be part of the immediate community in that area of Lacey and chose their locations based on affordability and the quality of the buildings available to them.

Access to I-5 and housing were also represented as important.

Zone 5 Themes

Cost and proximity to Martin Way were the primary reasons mentioned by respondents within Zone 5.

Q5 Open Response: Why have you continued to locate your business along Martin Way?

Respondents were asked in an open response to explain why they continue to locate their business along Martin Way. General themes represented for each zone are detailed below. The entire collection of responses for this question are included in Appendix 1.

Zone 1 Themes

The most common response in Zone 1 was related to location. Respondents indicated they preferred being close to the high number of cars driving by, proximity to I-5 and a lack of affordable alternatives.

Zone 2 Themes

Respondents in Zone 2 indicated that location was the primary reason they choose to locate along Martin Way. High visibility and access to drive-by traffic were significant contributors.

Zone 3 Themes

A small number of businesses in Zone 3 responded to this question, but those who did emphasized Martin Way's great visibility and the locations of their buildings as being their primary motivation to stay.

Zone 4 Themes

Respondents commonly indicated they remain at their current location due to its excellent visibility and the high drive-by traffic. Proximity to I-5 and nearby housing were mentioned.

A small number of respondents indicated that they would move, but fear losing their customer base.

Zone 5 Themes

Visibility from the road, easy access and cost were consistent themes across Zone 5.

Q6: From the perspective of retaining a quality workforce how important are the following?

Respondents were asked to rank the importance of the following elements Respondents were asked to choose between the following responses: to their business from the perspective of retaining a quality workforce:

- Convenient bus service
- Easy Car Access
- Convenient Bicycle Access
- High Quality Pedestrian Walkways

Q6.1 Convenient Bus Service (Workforce)

Respondents were split on their belief that convenient bus service was important. The highest concentration of support came from respondents in Zone 2 with 70.6% selecting "important". The lowest concentration of support came by way of Zone 3 where 55.6% of respondents selected "not important".

Graph 20: Convenient Bus Service (Workforce)

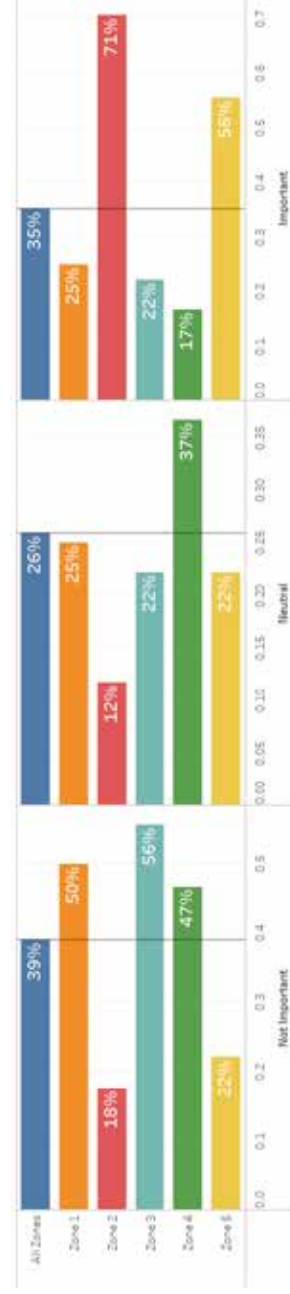


Table 22: Convenient Bus Service (Workforce)

	Important	Neutral	Not Important	Total Responses
Zone 1	25%	25%	50%	12
Zone 2	71%	12%	18%	17
Zone 3	22%	22%	56%	9
Zone 4	17%	37%	47%	30
Zone 5	56%	22%	22%	9
All Zones	35%	26%	39%	77

Q6.2 Easy Car Access (Workforce)

The importance of easy car access was communicated uniformly across all zones. The highest concentration of support came from Zones 1 and 5 with 100% of respondents selecting “important”. The lowest concentration of support came from Zone 2 with 83.3% selecting important.

Graph 21: Importance of Easy Car Access (Workforce)

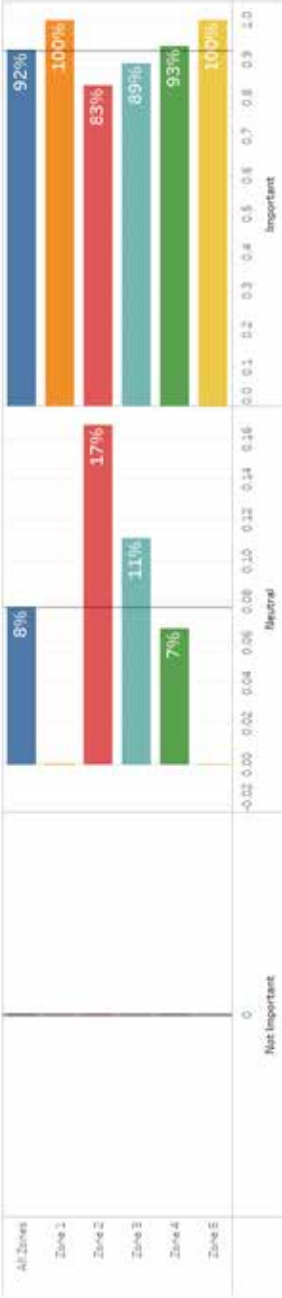


Table 23: Importance of Easy Car Access (Workforce)

	Not Important	Neutral	Important	Total Responses
Zone 1	0%	0%	100%	12
Zone 2	0%	17%	83%	18
Zone 3	0%	11%	89%	9
Zone 4	0%	7%	93%	30
Zone 5	0%	0%	100%	9
All Zones	0%	8%	92%	78

Q6.3 Importance of Bicycle Access (Workforce)

The majority of respondents indicated that bicycle access was not of major importance for their business with Zone 2 being the only exception at 64.3% indicating it as “important”. The lowest concentration of support came from Zone 3 where 77.8% of respondents selected “not important”.

Graph 22: Importance of Bicycle Access (Workforce)



Table 24: Importance of Bicycle Access (Workforce)

	Not Important	Neutral	Important	Total Responses
Zone 1	58%	17%	25%	12
Zone 2	24%	24%	64%	17
Zone 3	78%	11%	11%	9
Zone 4	47%	33%	20%	30
Zone 5	44%	33%	22%	9
All Zones	47%	26%	27%	77

Q6.4 Importance of Good Pedestrian Walkways (Workforce)

Respondents were split on the importance of quality walkways, but the majority indicated they were important to their business. The highest concentration of support was indicated in Zone 2 where 58.8% selected “important”. The lowest concentration of support came from Zone 4 where 36.7% selected “not important”.

Graph 23: Importance of Good Walkways (Workforce)



Table 25: Importance of Good Walkways (Workforce)

	Not Important	Neutral	Important	Total Responses
Zone 1	33%	42%	25%	12
Zone 2	12%	29%	59%	17
Zone 3	22%	33%	44%	9
Zone 4	37%	40%	23%	30
Zone 5	22%	33%	44%	9
All Zones	29%	35%	36%	77

Q7 From the perspective of your regular customers, how important are the following?

Respondents were asked to rank the importance of the following elements to their business from the perspective of retaining a quality workforce:

- Convenient bus service
- Easy Car Access
- Convenient Bicycle Access
- High Quality Pedestrian Walkways

Respondents chose between the following options:

- Not Important
- Neutral
- Important

Q7.1 Convenient Bus Access (Customers)

Respondents were split on the importance of bus access for their customers, but the majority indicated it was an important element for their business. The highest concentration of support came from respondents within Zone 2 with 70.6% selecting “important”. The highest concentration of lack of support for bus service came from Zone 1 with 58.3% selecting “not important”.

Graph 24: Importance of Bus Access (Customers)



Table 26: Importance of Bus Access (Customers)

	Important	Neutral	Not Important	Total Responses
Zone 1	17%	25%	58%	12
Zone 2	71%	18%	12%	17
Zone 3	44%	22%	33%	9
Zone 4	23%	27%	50%	30
Zone 5	56%	22%	22%	9
All Zones	39%	23%	38%	77

Q7.2 Convenient Car Access (Customers)

Respondents across all zones were uniform in their selection of car access being important for their customers with 100% of Zone 3 and 5 selecting “important”.

Graph 25: Importance of Car Access (Customers)

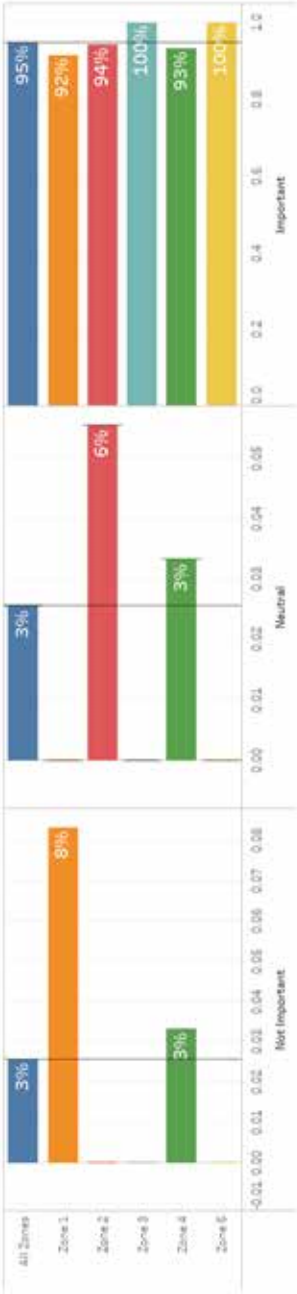


Table 27: Importance of Car Access (Customers)

	Not Important	Neutral	Important	Total Responses
Zone 1	8%	0%	92%	12
Zone 2	0%	6%	94%	18
Zone 3	0%	0%	100%	9
Zone 4	3%	3%	93%	30
Zone 5	0%	0%	100%	9
All Zones	3%	3%	95%	78

Q7.3 Importance of Bicycle Access (Customers)

Respondents were split on the importance of bicycle access but the majority of respondents selected that it was not important for their customers. The highest concentration of responses selecting “important” came from Zone 2 with 61.1% indicating so. Zone 1 had the highest concentration of “not important” responses at 66.7%.

Graph 26: Importance of Bicycle Access (Customers)



Table 28: Importance of Bicycle Access (Customers)

	Important	Neutral	Not Important	Total Responses
Zone 1	17%	17%	67%	12
Zone 2	61%	22%	17%	18
Zone 3	22%	33%	44%	9
Zone 4	17%	37%	47%	30
Zone 5	44%	22%	33%	9
All Zones	31%	28%	41%	78

Q7.4 Importance of Good Walkways (Customers)

Respondents were split on the importance of pedestrian walkways across zones. Zone 2 had the highest concentration of support with 72.2% indicating they were “important”. Zone 3 had the highest concentration of respondents that selected “not important” at 58.3%.

Graph 27: Importance of Good Walkways (Customers)



Table 29: Importance of Good Walkways

	Not Important	Neutral	Important	Total Responses
Zone 1	58%	25%	17%	12
Zone 2	11%	17%	72%	18
Zone 3	22%	33%	44%	9
Zone 4	40%	37%	23%	30
Zone 5	22%	22%	56%	9
All Zones	32%	28%	40%	78

Q8 Which of the following are most important to your business (select 3)

- Access by car
- Access for freight/deliveries
- Access by bicycle
- Access by pedestrians
- Access by bus
- Amount of parking space
- Location or layout of parking
- Lighting
- Landscaping
- Traffic conditions
- Amenities (parks & paths)
- Low overhead costs
- Housing nearby

Respondents were asked to select the three most important elements to their business (in no order) from the following elements: Respondents in Zone 1 most frequently selected “access by car” as an important element to the success of their business with 75% of respondents selecting it. The next most selected response was “traffic conditions”.

67% Respondents in Zone 2 chose “access by car” as one of the most important elements to the success of their business making it the most common choice. The next most common selection was “amount of parking space” with 33% of respondents selecting that option.

“Access by car” was again the most commonly selected item for businesses in Zone 3 at 67%. “Traffic conditions” were the next most common selection with 44% of businesses indicating it as important.

In Zone 4, “access by car” was the most commonly selected item at 75% and “traffic conditions” the second most commonly selected item at 66%. 100% of all respondents selected “access by car” as important within Zone 5. Traffic conditions was the next most commonly selected item with 78% indicating it as important for their success.

Graph 28: Most Important Elements to Business Success, Total Responses

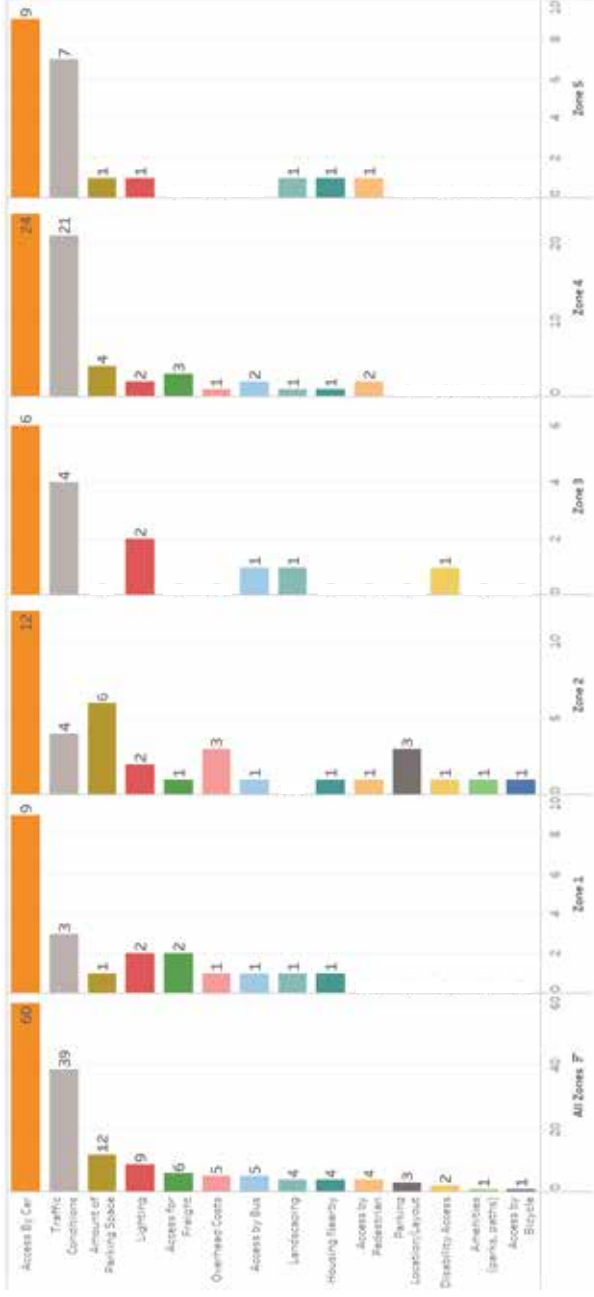


Table 30: Most Important Elements to Business Success, Total Responses

	All Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Access by Bicycle	1	0	1	0	0	0
Access by Bus	5	1	1	1	2	0
Access by Car	60	9	12	6	24	9
Access by Pedestrian	4	0	1	0	2	1
Access for Freight	6	2	1	0	3	0
Amenities (parks, paths)	1	0	1	0	0	0
Amount of Parking Space	12	1	6	0	4	1
Disability Access	2	0	1	1	0	0
Housing Nearby	4	1	1	0	1	1
Landscaping	4	1	0	1	1	1
Lighting	9	2	2	2	2	1
Overhead Costs	5	1	3	0	1	0
Parking Location/Layout	3	0	3	0	0	0
Traffic Conditions	39	3	4	4	21	7

100% of all respondents selected “access by car” as important within Zone 5. Traffic conditions was the next most commonly selected item with 78% indicating it as important for their success.

Q9 Open Response: Explanation of Q8 Selection

Respondents were asked to explain their selections from question 8. General themes across zones included:

- Importance of access by car
- Importance of traffic conditions
- Concern for safety when driving & turning

A complete list of responses is included in Appendix 1

Q10 Open Response: What would you like to see added to Martin Way in the future?

Respondents were asked to provide suggestion on what elements they would like to see added to Martin Way in the future. Below represents a summary of comments in each zone. A full list of responses can be found in Appendix 1.

Zone 1 Themes

Concern about homelessness and homeless activity was the single most common suggestion from respondents in Zone 1.

Some respondents indicated their desire for general beautification and landscaping improvements.

Zone 2 Themes

Concern about homelessness was a primary suggestion from businesses in Zone 2.

Traffic conditions were identified as an area for improvement.

Better lighting and beautification services were suggested.

Zone 3 Themes

Concern about homelessness and homeless activity was a primary concern for businesses in Zone 3.

Other concerns mentioned were in relation to lighting, bus stop access and a dislike of roundabouts, but these concerns were not commonly represented in Zone 3.

Zone 4 Themes

Street improvements were a common suggestion. Respondents indicated there is often debris on Martin Way or that street markings are not clearly visible.

A desire for “better” traffic lights including changing left turn lights from blinking yellow to protected green arrows.

Better lighting, landscaping and beautification was commonly referenced.

Zone 5 Themes

Suggestions around improving traffic congestion were common in this zone.

Q11: What Percentage of your Workforce is Currently Working from Home?

The vast majority of businesses surveyed had few or no workers currently working from home. This result is consistent with what we would expect given that the most commonly represented industry sector was Retail Trade and the next most common Accommodation and Food Service.³ Zone 3 had the highest presence of remote working with an average of 11.7% currently working from home.

Graph 29: Average Workforce Currently Working from Home



Table 31: Average Workforce Currently Working from Home

Zone 1	0.00%
Zone 2	1.35%
Zone 3	10.00%
Zone 4	2.93%
Zone 5	11.25%

³ See Table 1 for a breakdown of industry representation by Zone.

Appendix 1

Question 1.15: Open Response Items Needing Improvement

Respondents were asked to provide clarity on why they selected “needs improvement” in the questions above.

Zone 1

Need more lighting

Parking lot can only fit about 10 cars

They have a decent amount of lighting but more lights on the street would be helpful. Homeless problem is becoming a huge issue at their location and for their business

Need more parking space

Would be nice for a safe left-hand turn that does not need to go over double yellow lines

Difficult to turn in depending on which way you're coming from martin way. Leaves using another street. No one comes in riding bikes.

Street lines make it illegal to turn left into business, also fairly difficult to leave so the only access is from one way. More parking space and the layout could be improved for easier access. Lighting and landscaping could be improved to help the aesthetic and make people feel safe especially when daylight hours are limited during the winter. Not many parks and paths. Expensive to operate in this area.

Access by car and traffic conditions: there are a lot of accidents around the area that can affect business as well as lots of traffic. Amount of parking and layout: Since we are next to other businesses they tend to take out parking spaces and can leave employees.

There are several eyesores near my business not the least of which is the Century link maintenance building on the corner of Devoe and Martin. I don't expect much from the Holly Hotel but a multi-billion-dollar company such as CL should try harder to keep up the compound with small businesses like mine. Dilapidated vehicles for homeless people and homeless encampments are also just about everywhere near us. That really wears on us.

Zone 2

Median in the middle of the road makes it difficult to enter and exit location. Need more parking space and better layout of those parking spaces. Need more lighting and landscaping efforts, especially involving the cleaning up of garbage in the area. Not many parks or paths. Access for people with disabilities is difficult. The only housing nearby needs improvement. Overhead costs are rather expensive.

Traffic conditions get very hairy from time to time and there is definitely room for improvement in this area.

Difficult to turn left. Businesses are super far back from the road/sidewalk which would make it difficult for any customers on foot to enter/exit the location. Not enough lighting especially during early morning/night hours. Not many paths or any parks.

Landscaping could use some upkeep.

Difficult to leave the business due to occasional heavy traffic conditions.

Located in the middle of an intersection so it does not seem very safe to enter/exit on bike or foot. Traffic conditions can get really bad and there have been quite a few head-on collisions in the area. No parks or paths in the area, mainly surrounded by businesses.

Not many parks or paths in the area.

Difficult left run. Weird angle and layout. More lights, more landscaping. Bad traffic conditions between Sleater Kinney and College St.

Could use more lighting and landscaping help.

Traffic is always heavy. Left turns out of our driveway can be difficult. Left turns into our driveway can be difficult. I'm not sure what the solution is, however.

Leaving my office at Martin and lily. Specifically turning right onto Martin is a mess. Turning left is worse. It is dangerous anyway out. My address is 102 Lilly road. I see people pulling out in front of other people, narrowly missing pedestrians because they are so caught looking for a hole to pull out on. I am a very safe and careful driver and I have had that issue. The intersection of Lilly and Martin way is dangerous to access.

A left turn into our business office from Martin Way eastbound is difficult due to very short turn lane (traffic curb in center lane and driveway are too close to each other).

Zone 3

Weird shared parking lot with bar that makes parking odd to navigate. Landscaping is horrible, there are rocks all over the parking lot. Lighting in the front of the building is fine for this business, but there are about 6 other businesses in the building and the lighting out back is not great. Moving a homeless camp behind the location is not ideal.

Difficult to turn out because of unprotected left turn, causes a few accidents.

More landscaping on Martin Way could help customers see the signs and bank location better.

Difficult/impossible to turn left into the business location. Traffic gets extremely busy.

Lots of new traffic due to an increase of housing nearby makes it difficult to navigate entering and exiting the business premises. Not really any bike lanes or sidewalks nearby. Traffic conditions have gotten a lot worse. Increase of housing nearby has been inconvenient.

Very awkward for our business entrance. Our entrance is being shared with Denny's and super 8. There is only one entrance and exit. I think we need to have better way out and in.

Can be difficult to leave due to traffic conditions going left. Light timing could be better so a bunch of cars aren't getting backed up and causing traffic.

Zone 4

Need more lighting and landscaping needs to be kept up better on Martin Way. The ditches are overgrown in some areas and getting littered with garbage.

Depending on which way you are coming and going it is difficult to turn left to enter or exit the location. Same story for access by bike. Lighting on martin way needs a lot of improvement, it can be very dark in some spots. Too much housing nearby is contributing to the increase in traffic.

Hard to access by walking because pedestrians have to walk all the way down to the light or jaywalk for convenience, which is unsafe. Need more parking space

and a more convenient layout of the parking space. Traffic conditions are horrible sometimes. Disability parking is inconveniently located on the premises and is kind of far away. Overhead costs are expensive.

Light on Kinwood and Martin is horrible and inconveniently only blinks yellow.

Traffic can be bad depending on the time of day.

Islands in the middle of the road make it inconvenient to leave the location. Doesn't like how the landscaping was put in the middle of the road.

Difficult left hand turn out of business. Overhead costs are expensive.

Hard turning left out of location but right is fine.

"everything is too expensive right now"

Essentially no lighting or landscaping, makes it difficult for customers arriving around 5pm in the winter to find the location. No parks or paths in the area.

Difficult left turn especially during rush hour or lunch time when there is a lot of traffic. Could use more lighting when it starts to get dark early.

Very hard to enter and exit the location depending on which way you're coming from, the islands in dividing the lanes are very inconvenient for people trying to turn into the parking lot. Light is busy. There are not really any parks or paths.

Two parking lot outlets to Martin Way. One is right turn only. The other allows for left turns, but moderate traffic can make that difficult. Additionally, turning right in hopes of getting to the freeway can be more difficult with moderate traffic.

Martin Way is very busy.

Thurston county is growing so it is getting busier, everything else is great.

Not many sidewalks, parks, or paths in the area.

No bike lane or side walks around really. Landscaping could be kept up better. No parks or paths, no housing nearby. Horrible left turn leaving and traffic conditions do not help.

Bike access is difficult. Lighting is minimal Landscaping is not kept up. Little to no parks or paths in the area.

the parking lot is generally very full. Traffic conditions and the flow of traffic can be horrible in this area of Martin Way.

Unprotected left hand turn makes leaving dangerous and coming in difficult. Traffic can get super busy because of the timing of traffic lights.

Traffic conditions on Martin make it difficult to enter and exit the location, especially because they are located right on the corner. No bus stops nearby. Limited amount of parking space that has an inconvenient layout. Traffic conditions are bad in the area.

Only 1 way into business, very dangerous to come and go, east west is really bad for entering and exiting, north to south not so much. Biking is also dangerous. Need more parking spaces and a better layout of the parking lot. Lighting is horrible in the area, have had multiple people run into the telephone pole in the parking lot due to poor lighting conditions. Landscaping could use a lot of improvement. Traffic is very hectic between 12-6 which causes a lot of accidents in the surrounding area. No parks or paths around the area. Difficult to access business for people with disabilities, need this to be focused on. Housing nearby is "kind of sketchy."

Need more lighting and landscaping work.

People are speeding coming of the freeway which makes it difficult to come and go from the location.

Development going on right now makes access by walking difficult. Removed the bus stop that was across the street which cut down on their business from bus users. Traffic conditions can get a little busy at times but overall isn't too bad. Almost no parks or paths nearby. Things like storm water are expensive.

Businesses coming in across the street have been causing more traffic, kind of difficult to come in and out of business depending on which way you're coming from.

The entrance to the businesses on Martin Way do not have a traffic light, but have one about 100 ft or less. This can create a lot of near accidents.

Kind of difficult to access business from Martin Way depending on where you're coming from. The left hand turn at the light is tedious to wait at, same for leaving the business. Parking problem that mainly pertains to landlord but more parking space would be nice. Traffic conditions can be pretty busy sometimes.

Left hand turn is dangerous. More lighting and landscaping work would be helpful Not many parks nearby so neutral.

Car access: said that with the three entrances they have it can be difficult to get into and out of their property. When it is very busy there can be a line in the parking lot of people trying to exit. Parking and layout: A lot of trucks with trailers will come in and take up five or so parking spots. It would be nice to have an area where those trailers can park specifically. Overhead: Don't like how they do the water PUD.

There is no landscaping nor lighting along the stretch that my business is on Martin Way.

Zone 5

Traffic conditions make it difficult to leave the location safely sometimes.

Not easily accessible by bus. Not enough parking space and

Question 4: Why did you originally locate your business on Martin Way?

Zone 1

He knew someone who owned the building

They wanted to share a space with a certain business

land was available

Not sure

Not sure

because of traffic flow

Not sure why original owner chose the location.

Traffic flow and access to I-5

I found the perfect building for my business after 10 months of looking.

Zone 2

best building option at the time

Allstate's coverage, passing auto traffic

needed more space

not sure

Probably for the decent amount of drive by traffic

Found a spot that he thought would work and counted cars which led him to see that there were a lot of people driving by on this street. Quite a few military members in the area as well, and thought it was a good street to be on. He could afford it at the time.

N/A

N/A

We moved from the corner of College and Pacific (current Happy Teriyaki

location) in 1987 after acquiring and building out the property at 4426 Martin Way. The motivation was to own property. Didn't hurt to be located across the street from what was the largest movie theater in Thurston County. Mega church is fine, but I was not happy when the theater moved to lacey and I miss those Friday and Saturday movie crowds.

Location I am a dr.

Access to I-5, proximity to the Capitol to accommodate government travelers

Location

access to Chehalis trail, more spacious building

close to I-5 and hospital/healthcare businesses on Lilly Rd.

Zone 3

boss liked the visibility from the road and car access, easy access for walk in traffic

Being able to locate in the farm bureau building, size, building location, great moving from by Fred Myer gave them a break from the traffic

Historical - people know where to find us here
N/A

Zone 4

always been there

affordable and high traffic

relocated from martin way to another location on martin way

visibility in traffic

larger lot

premises became available

traffic, amount of people that drive by every day

found the property and new it would work for them

Corporate decision. Likely proximity to I-5 and local neighborhoods.

Access

Close to I-5

Customers in and out, good area Quiet community at the time

not sure

wanted to be at this location in this community

because of a papercip drop on a map Better advertisement and traffic movement and less theft

new building, just leasing and had some good pricing. Good location and like the lacey location

Building was sold that they used to be in so they moved across the street

bigger shop

Location

already an established lumber yard and owners chose to purchase it
Visibility and available retail space.

Developing area

Took over a family business - no choice in location really

Zone 5

got his own practice

Used to be a vet location, not really sure though

location along martin way

Cost: Former landlord doubled our rent

Location and cost

Question 5: Why have you continued to locate your business along Martin Way?

Zone 1

low overhead costs outweigh the issues of the area, homelessness is bad Building is functional with offsite parking Nice that he works offsite because homeless people would drive customers away

convenient to stay at the same location

great location, access to i-5
Not sure

because of traffic flow

Their customers are familiar with their location and know where to find them. There is no where else to go.

Great retail location

Proximity to I5, appropriate building size.

Zone 2

has good visibility and location

passing auto traffic

needed more space

not sure

Same as above and owns his own business so he does not have to worry about payments on that.

N/A

N/A

We own the building and property and have for the past 34 years. Why stop now?

I have a lease.

Unable to move the building.

Location

access to Chehalis trail, more spacious building

cost, ease of location, same as question 4

Zone 3

visibility and great location on the corner

Building location, better traffic than other locations in lacey

N/A

Zone 4

affordable and high traffic

great visibility for customers coming by car

visibility in traffic

good size and accessibility for customers

Good location and not a lot of places to move to in Lacey that are good for car sales

moving at the end of this year to get a bigger space but has been a great location for traffic

seems to be working

Corporate decision. Likely proximity to I-5 and local neighborhoods.

Access

Close to I-5

Difficult to move a business

not sure

good traffic flow

because business is located there and customers know where to find it

Better advertisement and traffic movement and less theft

Like the location and been there for a long time, like their landlord. Also, when customers know where you're located and you've been there for a long time it makes it difficult to relocate

amount of visible traffic

Location

Zone 5

visibility from the road

Same as above, although good location among housing developments

location along martin way

Easy access & landmarks

Location and cost

Question 9: Respondents were asked to explain their selections from question 8.

Zone 1

This has kept him at his location despite the decline of the area due to the homeless population and lack of strategic planning by the cities of Lacey and Olympia

most customers and employees come by car

Most customers come by car, bartenders come by bus, and homeless problem needs to be dealt with

Most customers come by car and more parking space is needed for services

Most customers come in their personal vehicle

All employees drive

They are an auto shop so access by car and traffic conditions are very important. Also, want people to feel safe with more lighting. Landscaping is important so there isn't garbage and shopping carts everywhere.

Most important because it is the most frequently used. They need deliveries to be successful and the other options are not utilized as much as car/freight.

The ease, safety, and security for my drivers and customers.

I have customers and suppliers coming to us with regularity. It's near I5 and accommodates large trucks well.

Zone 2

Better landscaping would help make the area feel cleaner and most customers and employees come by car, so parking space is important

Good on amount of parking space but it is important to the success

of the business, traffic conditions being better could improve access to location

More of a connection between housing and commercial businesses would be helpful (they seem distant and the business locations feel like a dead zone), most customers come by car, parking spaces are compact/very small for people driving larger vehicles

Sometimes customers are deterred from entering the Safeway because of the homeless issue in the parking lot, most customers come by car

Traffic conditions are really the only thing that hinder business and that only happens occasionally

It is important for employees and customers to feel safe at night

most customers and employees come by car

Important because he has a lot of parking area and finds himself lucky to have so much.

Safety is most important

Brings in the most customers and is the safest way to travel in the area.

We're still a family restaurant, and we're not within walking distance of many residences. People get to us via car.

It is dangerous getting into my parking lot. It is incredibly dangerous for bicycles. I worry about the safety of our patients coming and going. Many are elderly and are driving....

Olympia attracts state employees to it for business, but I believe it lacks amusement amenities to attract out-of-town visitors.

Martin way traffic can just me a nightmare at times.

We are a medical clinic and have clients with limited mobility

Zone 3

Lighting is very important for the safety of people working in the office, especially since many are women and a homeless encampment is being moved right behind the building Almost everyone comes by car

visibility from the road is important for bringing customers in, many come by car

Everything is working well but traffic can get fairly busy and it is important that customers are able to see the business by cutting back the trees and increased landscaping

Most customers access by car and they need to be able to enter and exit safely with the increasing business of traffic

Serve seniors and people with disabilities

Guest is looking for a convenient and safe parking / due to car break in and stealing

Almost everyone comes by car and it is working

Better traffic conditions, especially in the summer time when traffic backs up and makes it unsafe for people who are trying to make a left turn

Zone 4

ditches need to be controlled and landscaped better, more garbage cleanup Beautification Traffic can just get busy from time to time but it generally works well for the business

they want all traffic coming by car because they are a high end gift shop that wants to attract those customers/businesses

Most customers come by car and traffic conditions dictate how easy it is to come and go

most customers come by car so parking lot and traffic conditions play a big role in the convenience of this transportation method	All employees and customers arrive by car	most customers come by car so entering and exiting the premises easily is important. Lighting during winter hours is also important to make customers feel safe in the parking lot and entering the store
Visibility from the road is very important for attracting customers when people are in traffic driving by	Most customers and employees access the business by car and the traffic conditions can make it easier/harder for them to enter	
Great location and layout for deliveries, they are also able to keep a lot of stock of their products on hand while allowing for their customers to easily navigate their parking lot	Access by car is important because a lot of customers use this method of transportation to come into their business, unsafe turns make this difficult along with traffic conditions on Martin Way, lighting causes problems for customers in the parking lot with parking, exiting, and getting approached by people	Most people come to the location by car and traffic conditions being better would help
Most customers come by car, important to be able to access the location conveniently	Most, if not all, customers come by car and the parking situation could be better	Most everyone from customers to employees come by car
Most customers come by car	Mostly gets car traffic coming into business	Most customers come by car or walking
For a car dealership, access by car is important	access by car is most important because it is a great factor for business	As we service youth and adult martial arts for fitness and health (amongst other skills), having great and safe access off of Martin Way is important for continued access and safety.
Traffic attracts customers, all come by car	N/A	
Customers and employees come by car so it would be nice if traffic conditions could make it easy for them to enter and exit the location	Our business is local families and safety and traffic are the most important.	
Customers have a hard time getting to the location due to the odd layout of the medians/islands in the road and because the store is kind of hiding behind the gas station	It is very weird to wait for two traffic signal to reach your destination	
We have a customer base ranging from close communities to commuters. Some use the bus, but most drive.	We work on vehicles - we are an automotive shop, access by car is 100% of our business.	
We have three delivery trucks, and receive freight often.	Zone 5	
Need freight to sell.	customers come by car and need to enter/exit safely when traffic increases	
Essentially everyone comes by car	Most customers come by car so it is important that the parking lot has enough space for them and that they are able to navigate the traffic conditions easily and safely	
Better traffic conditions could make it easier for customers to enter and exit by car	Most customers come by car and the traffic conditions make it difficult for them	
Most customers come by bus and car, good traffic flow helps with business		

Question 10: What would you like to see added to Martin Way in the future?

Zone 1

Plan by Olympia and Lacey for making Martin Way a successful area, long-term strategy. Developing undeveloped area in a strategic, better way than just pot shops. Continuing to maintain it as a business location, not a residential location

more stop lights to help the flow of traffic

Taking care of the homelessness issue

Not sure

lighting and landscaping, aesthetically pleasing, and the ability to turn left/leave left out of the business

Less homelessness

Lighting and police coverage for the homeless that "J" walk on Martin Way. And be Strict on this. It's for their safety.

Reduction of homeless encampments and vehicles. The beautification of the surrounding with landscaping, proper fencing, basic maintenance, etc.

Zone 2

Added clean up efforts of garbage on Martin Way

More lighting, flex the live work development, street side service industry improvement

Easier access onto freeway from Sleater Kinney

None

Better traffic updates

Solve the homelessness problem

Traffic circle if possible. Maybe it is too busy. Maybe more stoplights getting to the intersection of Lily and Martin

Security cameras

Better upkeep

more police patrols or social services to get homeless or drug dependent folks off the streets and out of parking lots, wooded areas etc.

Zone 3

not to add a homeless encampment

no more roundabouts

A light at the intersection of carpenter road and Britton parkway

Better bus stops and cross walks

More lighting or anything to keep the area clean and safe from homeless community

Shortening the slow lane so that its not 1/4 a mile long

Zone 4

vacant lots getting developed and improving the looks of the rough and unfinished locations around Martin Way, better restaurants, not just fast food

Stripes on the road that you can see, and reflective

street improvement, actual roadway, lots of claims from road conditions on martin way (they are an insurance company), clean up from glass and other debris in the roadway

light to turn left changing from only blinking yellow to a red/green

more traffic lights

Take out the islands blocking left hand turns

N/A

No response

Less traffic.

nothing

more sidewalks

nothing

Better lighting and traffic lights, dealing with the homelessness issue

Lighting, easier/safer exit and entry ways, a light that helps safely move traffic (ex: green left hand turn light instead of just the flashing yellow)

No roundabouts

Not sure

Nothing specific

N/A

N/A

Clean it up and make it safer.

No ideas now

Landscaping and lighting along Martin Way would be beneficial to the outside look of the area in general.

Zone 5

lots of stoplights, don't add more

dealing with congestion

figure out how to slow the traffic down a bit, speed limit is supposed to be 50 mph but people are going way faster

Marvin/Martin intersection can get very busy but doesn't impact the business too much

better crosswalks, better lighting

Better controlled light systems and better turn access

Appendix 2

Martin Way Business Survey TRPC 2020

1. Please choose whether or not the following items are currently working well for your business or if they need improvement for your business to thrive.

	Working well for my business	Neutral	Needs Improvement
Access by car to business from Martin Way	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access by car from business to Martin Way (eg left turn safety)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access by bicycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access by pedestrians (sidewalks, walkways)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access by bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of parking space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
location or layout of parking spaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Landscaping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic Conditions on Martin Way	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amenities such as parks or paths	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access for persons with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing nearby	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overhead costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If needs improvement, ask for clarity and record answers here.

2. Approximately how many full-time employees work at your business?

3. How long have you been at your current location?

4. Why did you originally locate your business on Martin Way? (cost, access to i-5)

5. Why have you continued to locate your business along Martin Way? (cost, access to i-5)

6. From the perspective of retaining a quality workforce, how important are the following?

	Not important	Neutral	Important
Convenient bus service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easy car access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easily accessible by bicycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walkable with good pedestrian pathways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. From the perspective of your regular customers, how important are the following?

	Not important	Neutral	Important
Convenient bus service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easy car access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easily accessible by bicycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walkable with good pedestrian pathways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Which of the following are the most important to the success of your business? (Select 3 max)

- Access by car
- Access for freight/deliveries
- Access by bicycle
- Access by pedestrians
- Access by transit (bus)
- Amount of parking space
- Location/layout of parking space
- Other (please specify)
- Lighting
- Landscaping
- Traffic conditions along Martin Way
- Amenities (ex., parks, paths)
- Access for persons with disabilities
- Low overhead costs
- Housing nearby

9. Please explain why your choice from the previous question is the most important for your business?

10. Approximately what percentage of your workforce is now working from home due to Covid-19?

11. What would you like to see added to Martin Way in the future?

12. Would you like someone to follow-up with you about COVID-19 resources for businesses?

- Yes
- No

13. Enter the Business ID from Worksheet

Appendix 3 Visual Preference Survey

Martin Way Corridor Study

Visual Preference Survey Results

Date August 3, 2021
To Katrina Van Every, TRPC
From Rachel Miller, MAKERS
CC Sam Brookham, Leland Consulting Group

This memo serves as a summary of the land use and transportation results from the recently conducted Visual Preference Survey for the Martin Way Corridor Study.

Land Use

- Overall there is strong support for retail services and public amenities along the corridor, and mixed support for residential and office uses.
 - As Martin Way continues to develop, what types of buildings and development would you like to see more of?
 - 81% Public amenities
 - 74% Retail, services, restaurants, etc
 - 43% Offices
 - 42% Housing
 - 19% Regional light-industrial and general commercial
 - Lower density housing types are more strongly supported than higher density types. Support (“very good idea” and “appropriate”):
 - 63% Townhouses
 - 57% 2-3 story apartments
 - 37% 4-6 story apartments
 - 25% 5-7 story apartments
- Roughly half of all respondents (49%) think there are large commercial spaces along Martin Way that could be adapted and re-used.
 - When asked about specific opportunities, the former ShopKo building was the most frequently mentioned, along with other buildings in “Martin Village” (Regal Cinema shopping center near I-5).
 - Respondents also mentioned many vacancies and run-down buildings in strip malls along the arterial.
- Respondents felt small and medium retail uses (and, to a lesser extent, offices) were appropriate to site directly adjacent to the sidewalk on Martin Way, while other uses should be separated from the road by open space or, for large commercial stores, parking lots.
- **Demographics**
 - Support for housing varied the most among different demographic groups.
 - In general, low income respondents, younger respondents, respondents of color, and renters tended to be more supportive of housing, with lower support for commercial uses.
 - Younger residents had the highest tolerance for larger apartments (4-6 stories and 5-7 stories) of any group but still preferred lower densities overall.



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- All groups ranked public amenities as the most desirable type of new development. Low-income respondents had the highest support for public amenities among any group, while older respondents had the lowest support.
- About 25% of respondents didn't fill out the race and income questions. These respondents tended to be significantly more negative about all proposals than the group as an average.

Signs

- Of the five types of signs tested, monument signs were by far the most popular among all groups, followed by pole signs.
- Billboards had the least support. 32% of respondents said billboards were not appropriate on Martin Way. However, 31% said they were either appropriate or a "very good idea".
- Respondents generally did not find temporary signs to be helpful:
 - Two thirds said temporary signs were "not helpful" or "somewhat helpful".
 - Only 6% said temporary signs were very helpful.
- There were no significant differences among the responses of different demographic groups.

Transportation

- Generally strong support for changes to roadway to support pedestrian safety
- Filling sidewalk gaps priority—In front of existing businesses is the clear favorite
- Crosswalks
 - Flashing beacon is favorite and very strongly supported (75% support)
 - Other options also popular
- Bicycle infrastructure
 - Protected lane (physical barrier) is most popular (72% support and large group of "very good idea" with 49.5%)
 - Other options also popular
 - Painted lanes are least popular
- Landscape treatments
 - Street trees between road and sidewalk most popular (81% support and large group of "very good idea" with 49%)
 - Some support for stormwater swale and landscaped strip
- Median—Landscaped median much more popular than hardscape median
 - **Most popular** roadway intervention on survey (83% support and largest group of "very good idea" with 58%)
 - Even stronger support among low income and people of color
- Utilities undergrounding
 - Overall, more support than opposition, though responses are very divided
 - 56% Very important/Important
 - 39% Somewhat important/Not important
 - **Least supported** roadway improvement on survey
- **Demographics**
 - **Very limited differentiation among demographic groups overall**
 - Low income
 - Low-income respondents were most "positive" group, with high rates of approval towards most interventions

- Most supported idea: landscaped median (88%)
- Even stronger support for protected bike lanes (and buffered bike lanes)
- Smallest sample size among demographic groups
- Stronger support for sidewalks along major streets
- People of Color
 - Limited differentiation from group as a whole
 - Most supported idea: street trees (83%)
 - Stronger support for pedestrian bridge and utility undergrounding
 - Somewhat stronger support for shared use path (though protected bike lanes is still the favorite) and narrow landscape strip (though still prefer street trees)
- Residents within ¼ mile
 - Generally less supportive of proposed interventions
 - Residents within ¼ mile somewhat lower reported incomes and more likely to be renters
- Gender
 - Little differentiation based on gender
 - Females generally as or more supportive of all interventions except they showed less support for undergrounding utility lines and slightly less for shared use paths
- Age
 - Younger respondents generally more supportive of interventions than older respondents
- Tenure
 - Homeowners generally less supportive of interventions than renters

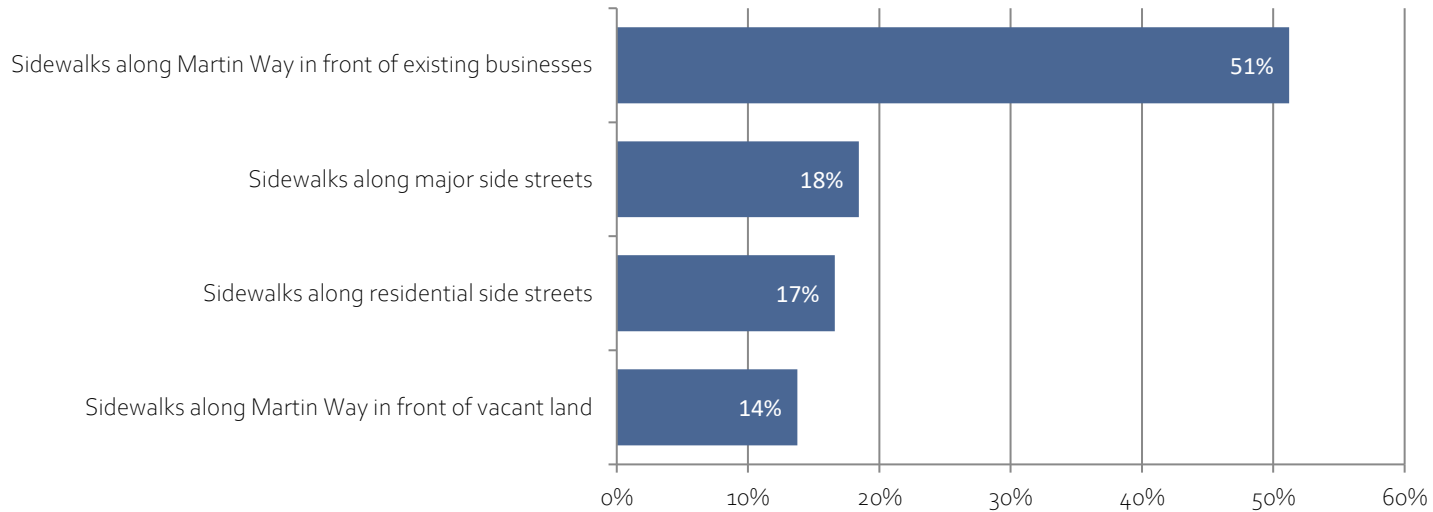


Online Open House
Visual Preference Survey

895 Total Responses

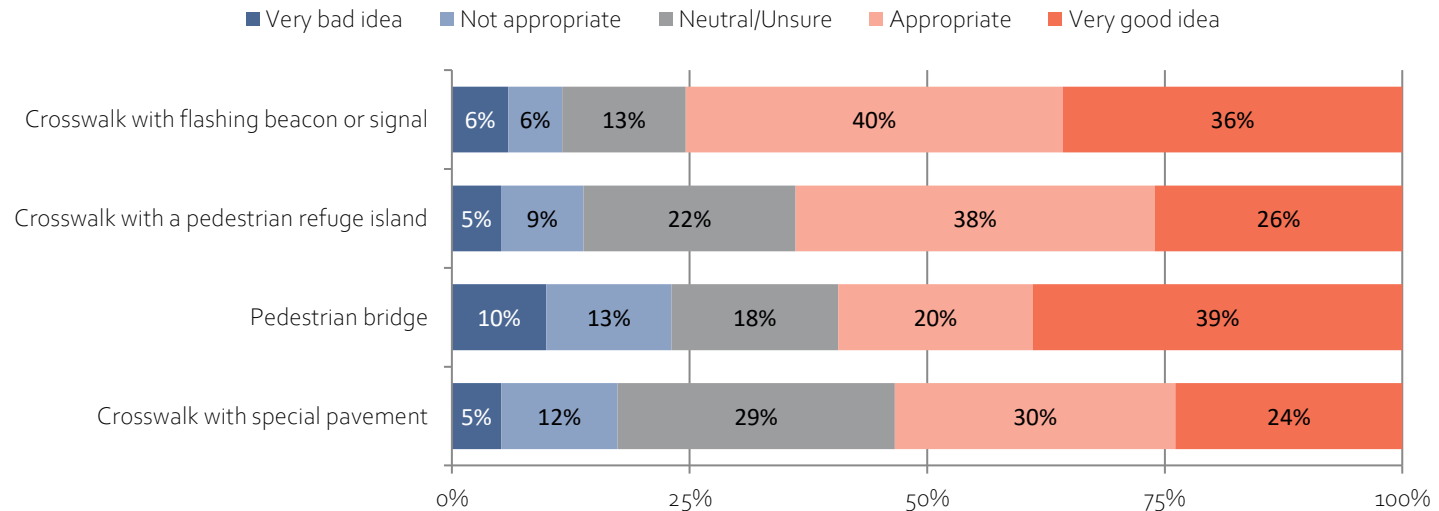
Sidewalk gaps exist along Martin Way and its side streets. What sidewalk gaps are most important to fill first?

Answered: 873 Skipped: 22



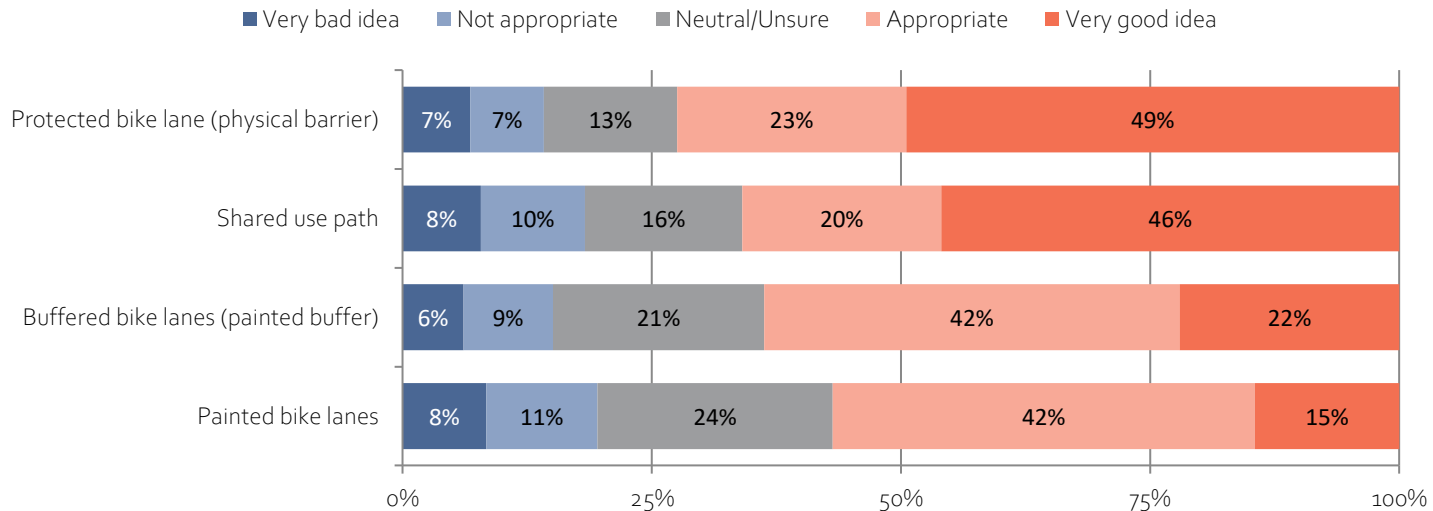
As a pedestrian or someone who uses a mobility device (wheelchair, walker, etc.), what kind of crossings would you like to see on Martin Way (see images above)?

Answered: 884 Skipped: 11



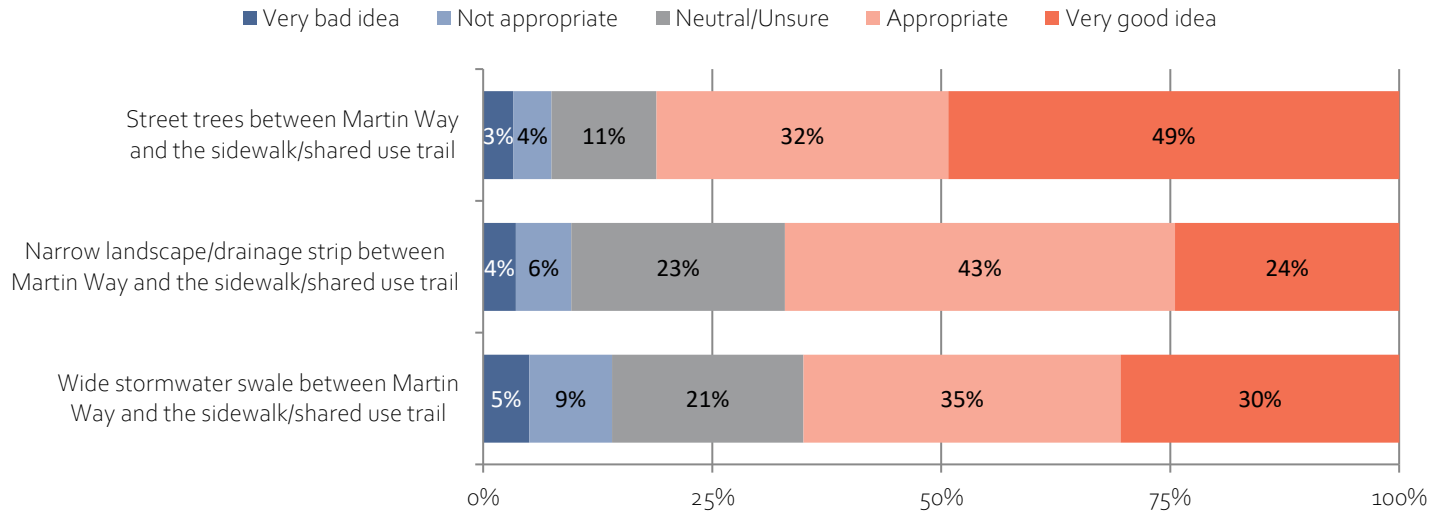
As a bicyclist, what kind of bike lanes would you like to see on Martin Way?

Answered: 864 Skipped: 31



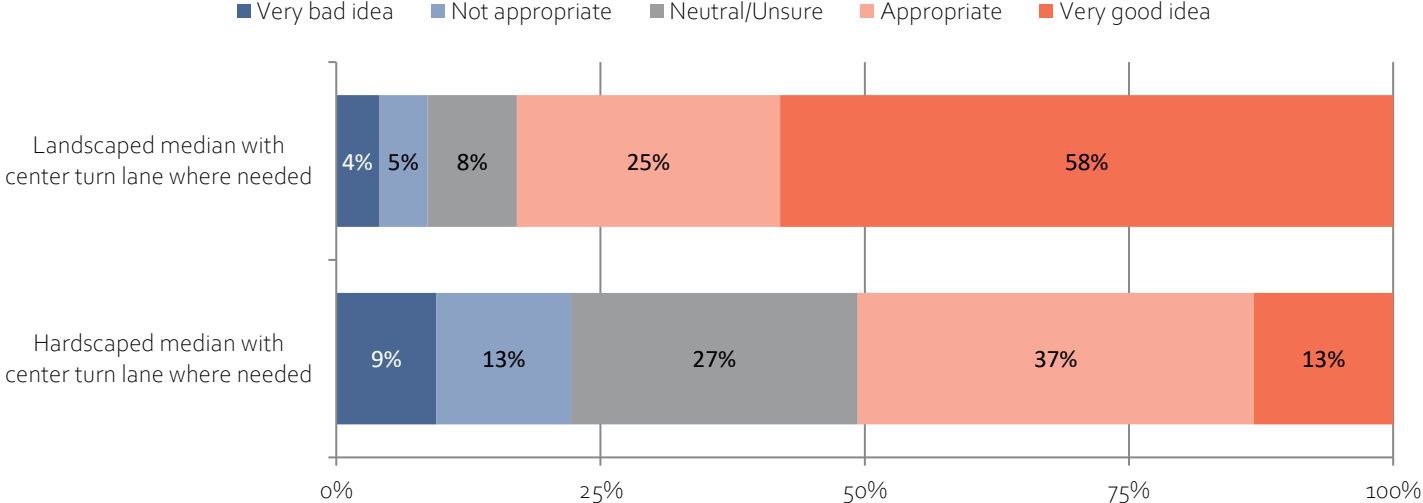
What type of landscape treatments would most improve Martin Way?

Answered: 857 Skipped: 38



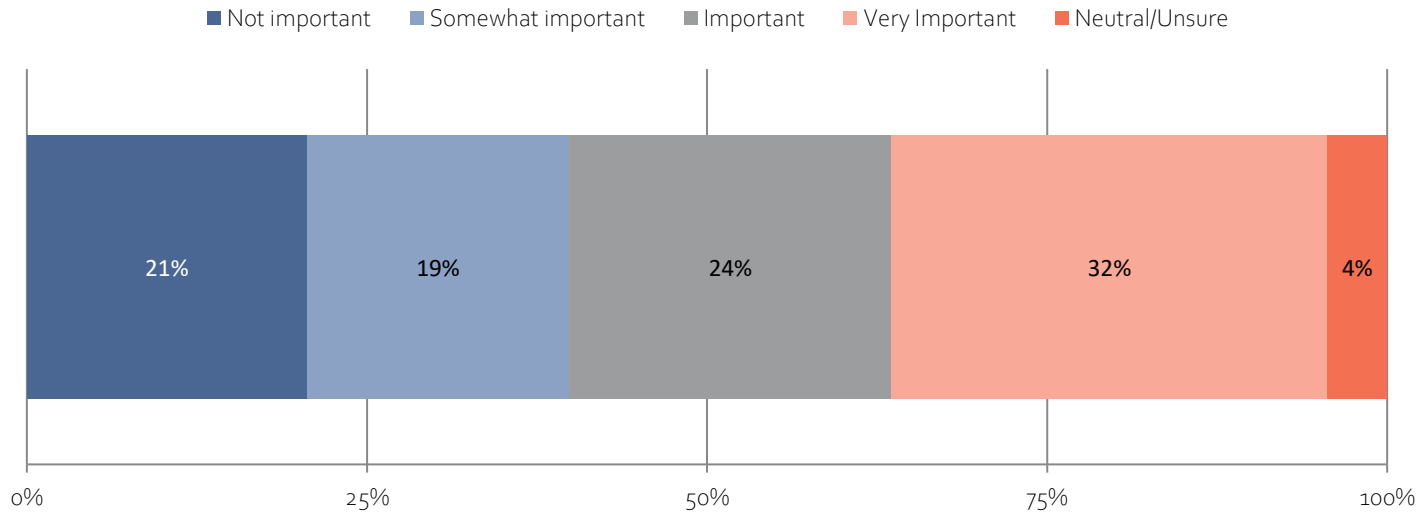
What type of median would you most like to see on Martin Way?

Answered: 851 Skipped: 44



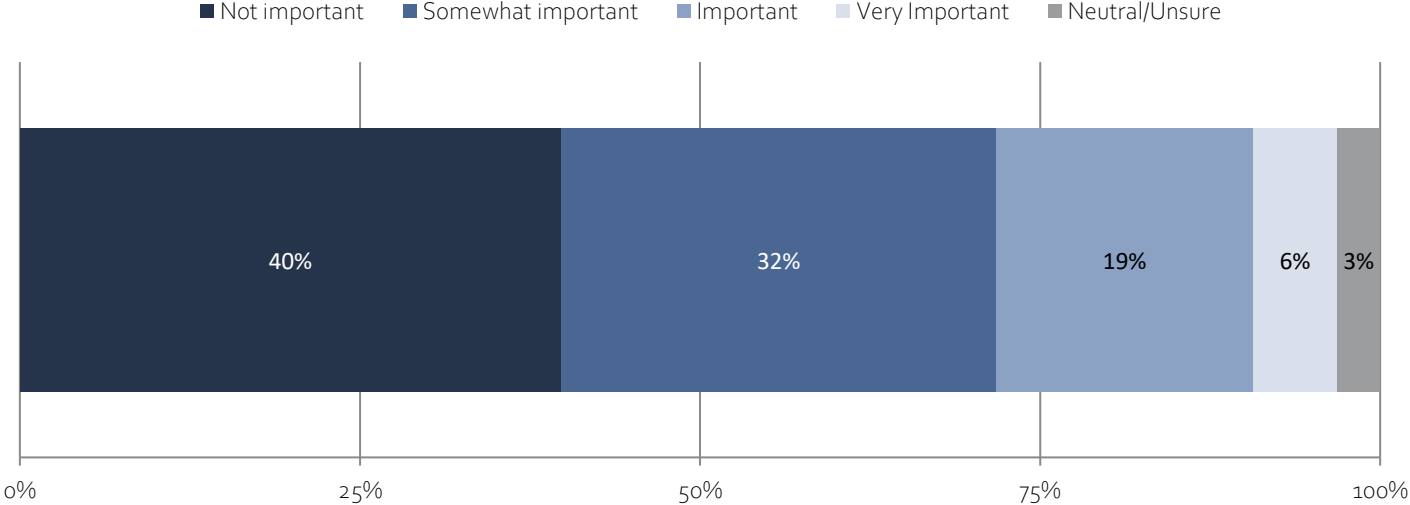
Knowing it can be expensive, how important is it to you that existing overhead utility lines along Martin Way be rerouted underground?

Answered: 845 Skipped: 50



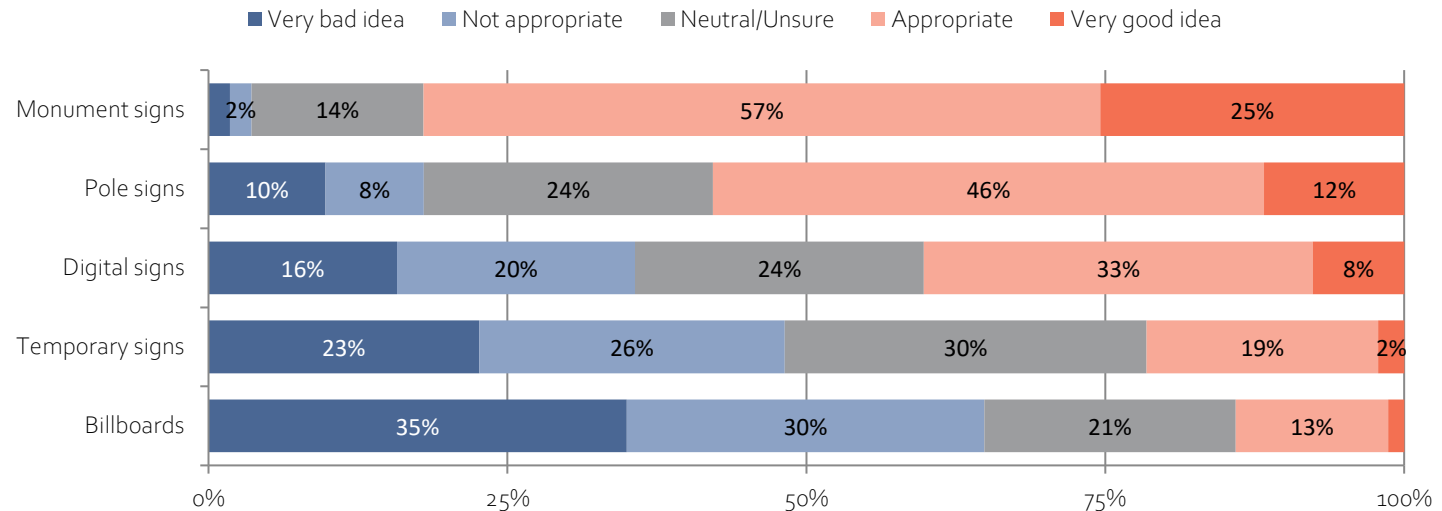
To what extent do temporary signs help you find the places - or the products - you're looking for along Martin Way?

Answered: 822 Skipped: 73



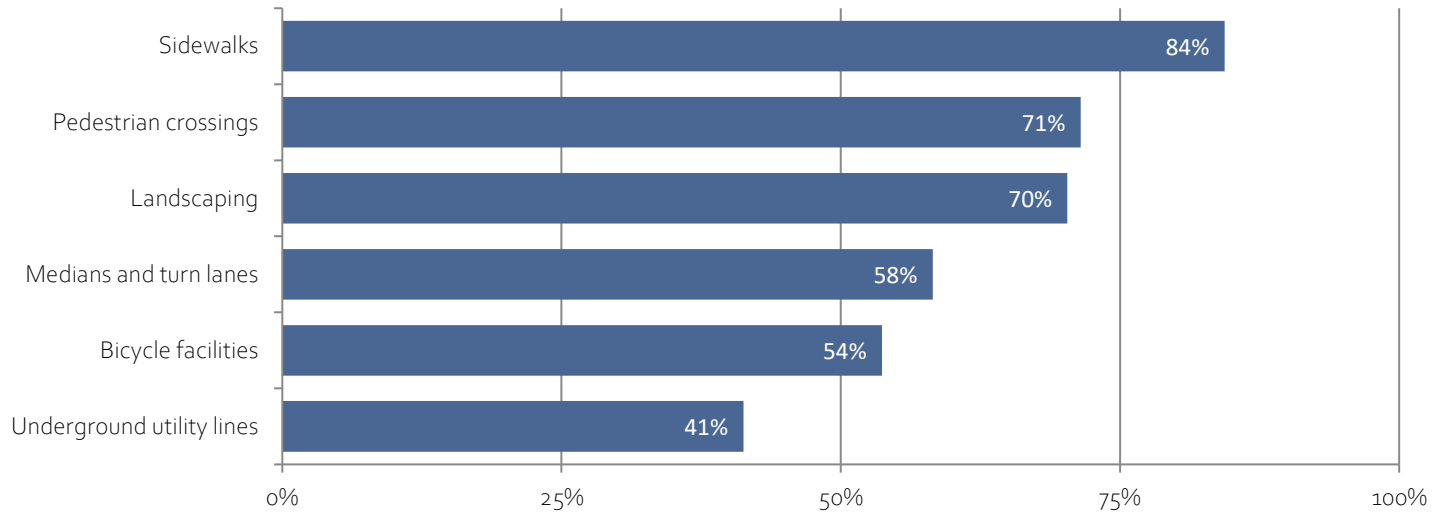
Which sign types are appropriate along Martin Way?

Answered: 844 Skipped: 51



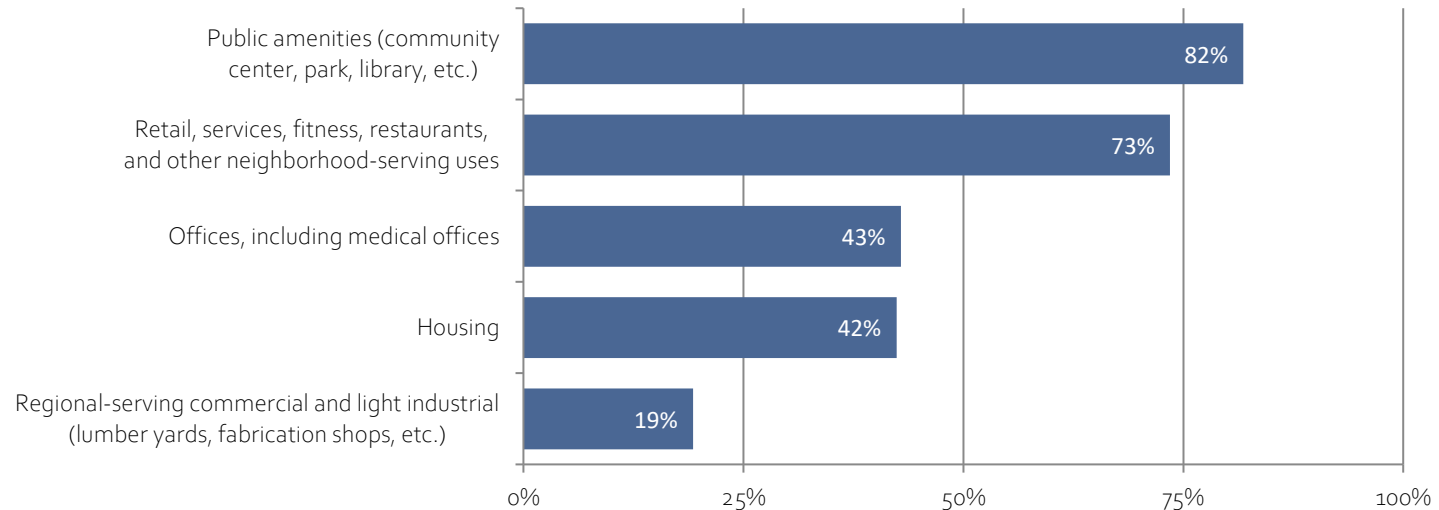
As Martin Way continues to develop, what types of streetscape elements would you like to see more of? (check all that apply)

Answered: 838 Skipped: 57



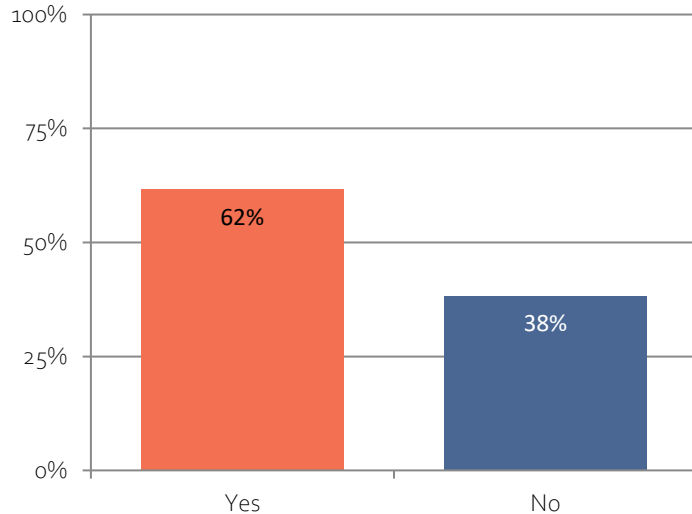
As Martin Way continues to develop, what types of buildings and development would you like to see more of? (check all that apply)

Answered: 830 Skipped: 65



Are there large commercial spaces along Martin Way you think could be adapted and re-used? Where are there opportunities to adapt and re-use large commercial spaces?

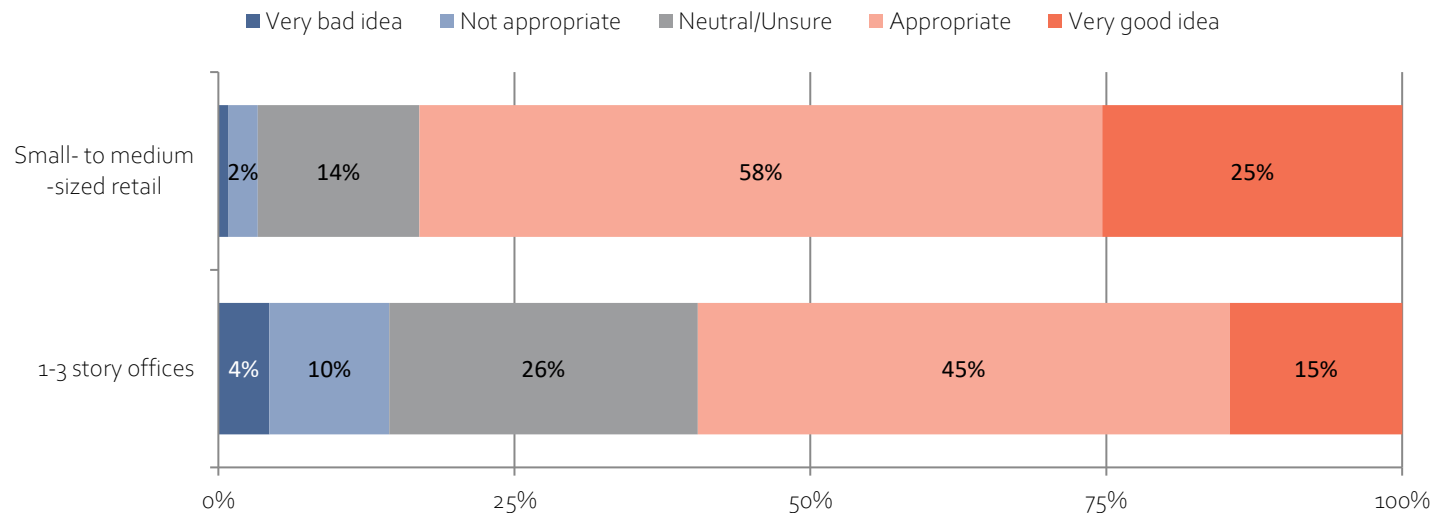
Answered: 710 Skipped: 185



Winco
Strip mall
Shopko
furniture store
Burlington
Sears

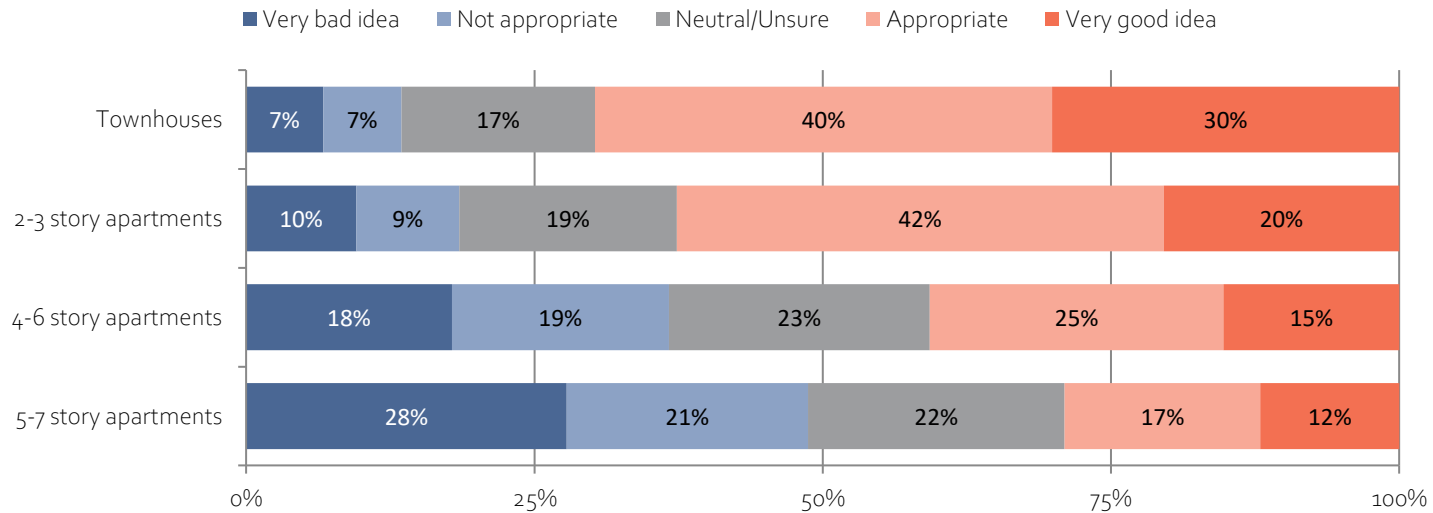
As the Martin Way corridor continues to develop, what kind of commercial space do you want to see more of?

Answered: 822 Skipped: 73



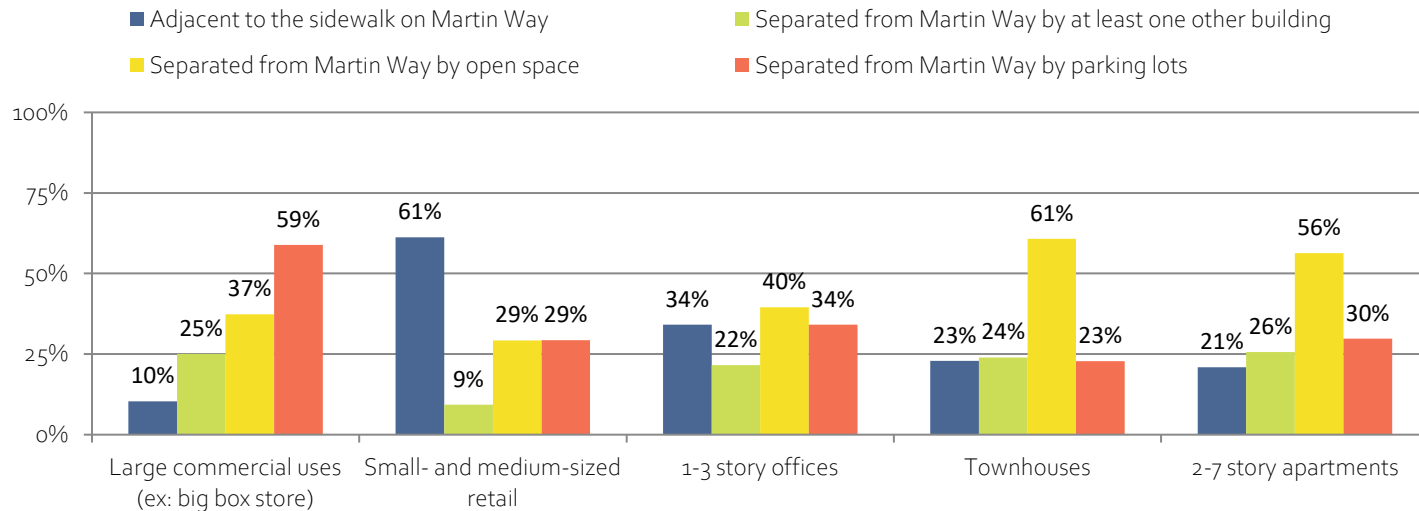
As the Martin Way corridor continues to develop, how appropriate do you feel the following developments are?

Answered: 819 Skipped: 76



How should the following development types be oriented to Martin Way? (check all that apply)

Answered: 791 Skipped: 104



Survey Demographics

Race/Ethnicity*...

3% American Indian & Alaska Native

5% Asian

2% Black or African American

4% Hispanic or Latino

1% Native Hawaiian & Pacific Islander

92% White

2% Some other race

**Respondents could choose more than one answer*

Live...

21% are corridor residents

79% live elsewhere

Tenure...

18% are renters

82% are homeowners

<1% are unhoused or couch surf

Household Income...

2% earned less than \$24,999

10% earned \$25,000 to \$49,999

88% earned \$50,000 or more

Age...

1% 24 or younger

26% 25-39

34% 40-54

31% 55-69

8% 70 or older

Gender...

63% female

35% male

2% Non-binary



Questions about the survey results? Contact:

Katrina Van Every, Senior Planner
vaneveryk@trpc.org

www.trpc.org/martinway

Visual Preference Survey

Martin Way Visual Preference Survey

Help us understand what you think Martin Way should look like as we plan for the next 25 years. We'll ask you about your thoughts on:

- Streetscape elements – sidewalks, bicycle facilities, landscaping, utilities, and signage
- Building Types – commercial renovations, new retail, offices, and residential

This survey will take about 10 minutes to complete. Thank you for your time and feedback!

Visual Preference Survey

Sidewalks & Pedestrian Crossings

Sidewalks coupled with safe and frequent crossings support a walkable urban environment, making it easier to get from place to place. Clearly defined sidewalks and crossings where pedestrians are expected to be help make the road safer for both walkers and drivers.

Sidewalks

1. Sidewalk gaps exist along Martin Way and its side streets. What sidewalk gaps are most important to fill first?

- Sidewalks along Martin Way in front of existing businesses
- Sidewalks along Martin Way in front of vacant land
- Sidewalks along major side streets
- Sidewalks along residential side streets

Pedestrian Crossings

A. Crosswalk with flashing beacon or signal



B. Crosswalk with a pedestrian refuge island



C. Crosswalk with special pavement



D. Pedestrian bridge



2. As a pedestrian or someone who uses a mobility device (wheelchair, walker, etc.), what kind of crossings would you like to see on Martin Way (see images above)?

	Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
A. Crosswalk with flashing beacon or signal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Crosswalk with a pedestrian refuge island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Crosswalk with special pavement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Pedestrian bridge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Visual Preference Survey Bicycle Facilities

More people bicycle when they have safe places to ride. Routes that provide comfortable, low-stress bicycling conditions can increase safety for people walking and driving as well as bicyclists.

A. Painted bike lanes



B. Buffered bike lanes (painted buffer)



C. Protected bike lanes (physical barrier)



D. Shared use path



3. As a bicyclist, what kind of bike lanes would you like to see on Martin Way (see images above)?

	Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
A. Painted bike lanes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Buffered bike lanes (painted buffer)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Protected bike lane (physical barrier)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Shared use path	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Visual Preference Survey Landscaping

Trees and landscaping along roadways enhance urban streets by creating shade and reducing stress. Landscaping can also slow, absorb, and clean stormwater runoff so that less pollution makes its way into streams and groundwater. When requiring or putting in landscaping, communities need to consider the cost of long-term maintenance and avoid creating safety hazards.

A. Street trees between Martin Way and the sidewalk/shared use trail



B. Wide stormwater swale between Martin Way and the sidewalk/shared use trail



C. Narrow landscape/drainage strip between Martin Way and the sidewalk/shared use trail



4. What type of landscape treatments would most improve Martin Way? (see images above)

	Very bad idea	Not appropriate	Neutral/unsure	Appropriate	Very good idea
A. Street trees between Martin Way and the sidewalk/shared use trail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Wide stormwater swale between Martin Way and the sidewalk/shared use trail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Narrow landscape/drainage strip between Martin Way and the sidewalk/shared use trail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Visual Preference Survey

Medians & Turn Lanes

Center medians can help calm traffic, act as a refuge for pedestrians crossing wide streets, and make room for landscaping or lighting. When combined with center turn lanes, they limit access points in ways that can help reduce collisions by making traffic patterns more predictable.

A. Landscaped median with center turn lane where needed



B. Hardscaped median with center turn lane where needed



5. What type of median would you most like to see on Martin Way? (see images above)

	Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
A. Landscaped median with center turn lane where needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Hardscaped median with center turn lane where needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Visual Preference Survey
Overhead Utility Lines

Putting utility lines underground can improve the way a street looks and service reliability. The tradeoff is burying utility lines can be very costly and can make repairs more challenging. Burying utility lines can be timed with other construction projects to reduce costs.

Above vs. Below Ground Utility Lines



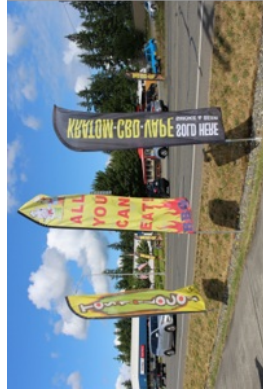
6. Knowing it can be expensive, how important is it to you that existing overhead utility lines along Martin Way be rerouted underground?

Not important Somewhat important Important Very Important Neutral/Unsure

Visual Preference Survey Signage

Signs help people find the places and products they're looking for. They can also make the street look cluttered and uninviting.

Temporary Signs



7. To what extent do temporary signs help you find the places - or the products - you're looking for along Martin Way? (see image above)

Not helpful Somewhat helpful Helpful Very helpful Neutral/Unsure

Sign Types



8. Which sign types are appropriate along Martin Way? (see images above)

	Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very Good Idea
A. Temporary signs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Monument signs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Digital signs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Billboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Pole signs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Visual Preference Survey Development Generally

9. As Martin Way continues to develop, what types of streetscape elements would you like to see more of? (check all that apply)

- Sidewalks
- Pedestrian crossings
- Bicycle facilities
- Landscaping
- Medians and turn lanes
- Underground utility lines

10. As Martin Way continues to develop, what types of buildings and development would you like to see more of? (check all that apply)

- Housing
- Offices, including medical offices
- Retail, services, fitness, restaurants, and other neighborhood-serving uses
- Regional-serving commercial and light industrial (lumber yards, fabrication shops, etc.)
- Public amenities (community center, park, library, etc.)

Visual Preference Survey Commercial Buildings

Big Box Commercial Renovations

Older commercial buildings over 80,000 square feet (“big box” stores, for example) on large lots can be converted to new uses and make use of existing parking lots. This can be helpful in reviving vacant or struggling retail areas and offer destinations for nearby residents and workers.

Below are examples of big box commercial renovations:



Kmart to school conversion



Kmart to museum conversion



Grocery store to library conversion



Grocery store to church conversion

11. Are there large commercial spaces along Martin Way you think could be adapted and re-used?

Yes

No

12. If you answered “yes” to the previous question, where are there opportunities to adapt and re-use large commercial spaces?

New Retail and Office Space

Below are examples of retail and office buildings that are common on the Martin Way corridor:

A. Small- and medium-sized retail



B. 1-3 story offices



13. As the Martin Way corridor continues to develop, what kind of commercial space do you want to see more of? (see images above)

	Very bad idea	Not appropriate	Neutral/unsure	Appropriate	Very good idea
A. Small- to medium-sized retail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. 1-3 story offices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Visual Preference Survey Residential Buildings

Below are types of residential development that are possible on the Martin Way corridor:

Townhouses



Some quick facts about townhouse developments:

- 15-30 dwelling units per acre
- An affordable homeownership option
- Supports some small businesses within a short walk
- Supports frequent transit service within a short walk

14. As the Martin Way corridor continues to develop, how appropriate do you feel townhouse developments are?

Very bad idea Not appropriate Neutral/Unsure Appropriate Very good idea

2-3 Story Apartments



Some quick facts about 2-3 story apartments:

- Already common along Martin Way
- 20-30 dwelling units per acre
- Surface parking
- Supports small businesses within a short walk
- Supports frequent transit service within a short walk

15. As the Martin Way corridor continues to develop, how appropriate do you feel 2-3 story apartment developments are?

Very bad idea Not appropriate Neutral/Unsure Appropriate Very good idea

4-6 Story Apartments



Some quick facts about 4-6 story apartments:

- Becoming more common along Martin Way
- 40-60 dwelling units per acre
- Surface parking
- Supports small businesses within a short walk
- Supports frequent transit service within a short walk

16. As the Martin Way corridor continues to develop, how appropriate do you feel 4-6 story apartment developments are?

Very bad idea Not appropriate Neutral/Unsure Appropriate Very good idea

5-7 Story Apartments



Some quick facts about 5-7 story apartments:

- No developments along Martin Way currently
- 50-120+ dwelling units per acre
- Structured parking is costly; typical only when parking is limited
- Supports small businesses within a short walk
- Supports frequent transit service within a short walk

17. As the Martin Way corridor continues to develop, how appropriate do you feel 5-7 story apartment developments are?

Very bad idea Not appropriate Neutral/Unsure Appropriate Very good idea

**Visual Preference Survey
Building Orientation**

We'd like to understand how you think various development types should be situated in relationship to Martin Way. Building fronts, especially entries, can be lively places that make a sidewalk or street more inviting for people.

18. How should the following development types be oriented to Martin Way?
(check all that apply)

	Adjacent to the sidewalk on Martin Way		Separated from Martin Way by at least one other building		Separated from Martin Way by open space		Separated from Martin Way by parking lots	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Large commercial uses (ex: big box store)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Small- and medium-sized retail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1-3 story offices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Townhouses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2-7 story apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Visual Preference Survey
Demographic Information

Please share some information about yourself. Since we want to make sure we hear from people from all walks of life and all parts of the community, this will help use determine if we have reached a broad representation of the community. These questions are optional.

19. If you would like to be informed via email about this project, please provide your email address.

20. What is your age range?

- 14 or younger
- 15-24
- 25-39
- 40-54
- 55-69
- 70-84
- 85 or older
- Prefer not to answer

21. What is your gender?

- Female
- Male
- Non-binary
- Prefer not to answer

22. Do you live within a ¼ mile of Martin Way?

- Yes
- No
- I don't know
- Prefer not to answer

23. Does your household rent or own your home?

- My household rents our home
- My household owns our home
- My household lives with someone else (ex: couch surfing)
- My household is unhoused or unsheltered
- Prefer not to answer

24. What is your race/ethnicity? (check all that apply)

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino
- Native Hawaiian or Other Pacific Islander
- White
- Some other race
- Prefer not to answer

25. What is your annual household income?

- \$14,999 or less
- \$15,000-\$24,999
- \$25,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 or more
- I don't know
- Prefer not to answer

Appendix 3 Visual Preference Survey Results

Appendix 4 Market Study



Martin Way Corridor

Market Study FINAL

PREPARED FOR



PREPARED BY



JULY 2021

Introduction

Purpose & Methodology

Martin Way Corridor Study. Martin Way is a major regional thoroughfare and corridor serving the communities of Olympia, Lacey, and Thurston County. The former state highway serves as the area's primary alternative to Interstate 5, has frequent transit service, and is home to a variety of business activities and destinations. Looking forward, the corridor is forecasted to grow in importance into the future as a strategic transportation link and business destination. A comprehensive review of the Martin Way's current conditions and future opportunities is underway to help guide growth to better serve the needs of the community.

Led by Thurston Regional Planning Council, the Martin Way Corridor Study will identify a common vision, as well as opportunities to develop the identity and character of the Martin Way Corridor (MWC) as it grows into the future.

Market Study. The purpose of this market study is to identify economic opportunities and constraints, highlight potential models for future development, establish the potential corridor market capture for residential, commercial, industrial, and other uses, and begin a discussion of strategic recommendations. It will specifically address the following questions:

- What are the current demographics and employment trends that affect opportunities in the corridor, including the ongoing COVID pandemic and vehicle and transit access and ridership?
- What are the market, economic, and employment factors that affect development opportunities?
- What are the best opportunities for redevelopment?
- Which land uses, character, and scale are most appropriate and are supported by economic conditions?

While the market study will be conducted for the entire corridor, the latter recommendations will focus on high-priority areas based on market conditions, land availability, and regulatory structure.

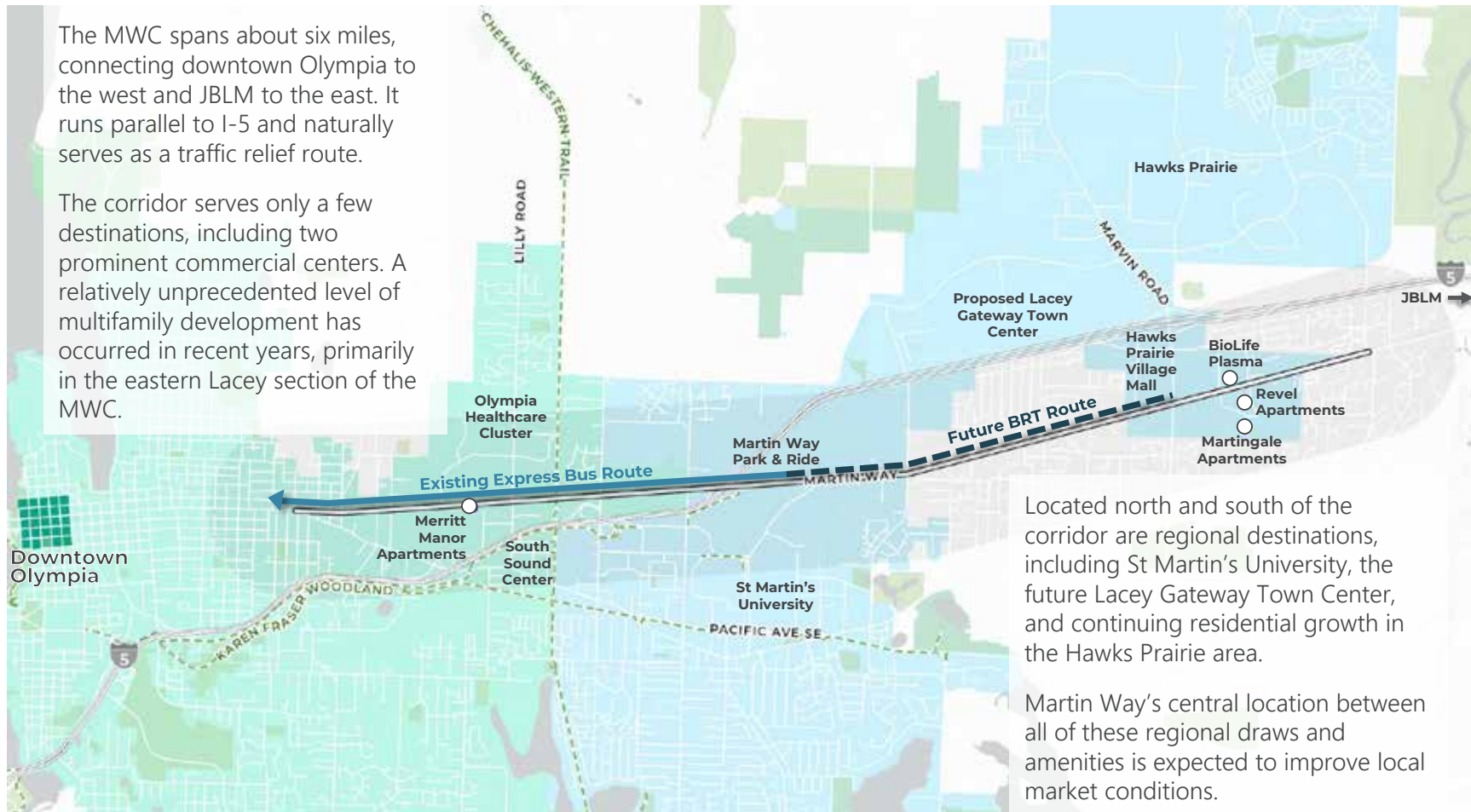
Methodology. In order to document opportunities and constraints from a market perspective, Leland Consulting Group documented key takeaways from existing planning documents, market studies, and broker reports; analyzed US census data, real estate data (from Costar, a national database), building permit data, and economic information; and held stakeholder interviews with developers, brokers, major employers, and public agency partners.

Introduction

Martin Way Corridor Study Area & Local Context

The MWC spans about six miles, connecting downtown Olympia to the west and JBLM to the east. It runs parallel to I-5 and naturally serves as a traffic relief route.

The corridor serves only a few destinations, including two prominent commercial centers. A relatively unprecedented level of multifamily development has occurred in recent years, primarily in the eastern Lacey section of the MWC.



Located north and south of the corridor are regional destinations, including St Martin's University, the future Lacey Gateway Town Center, and continuing residential growth in the Hawks Prairie area.

Martin Way's central location between all of these regional draws and amenities is expected to improve local market conditions.

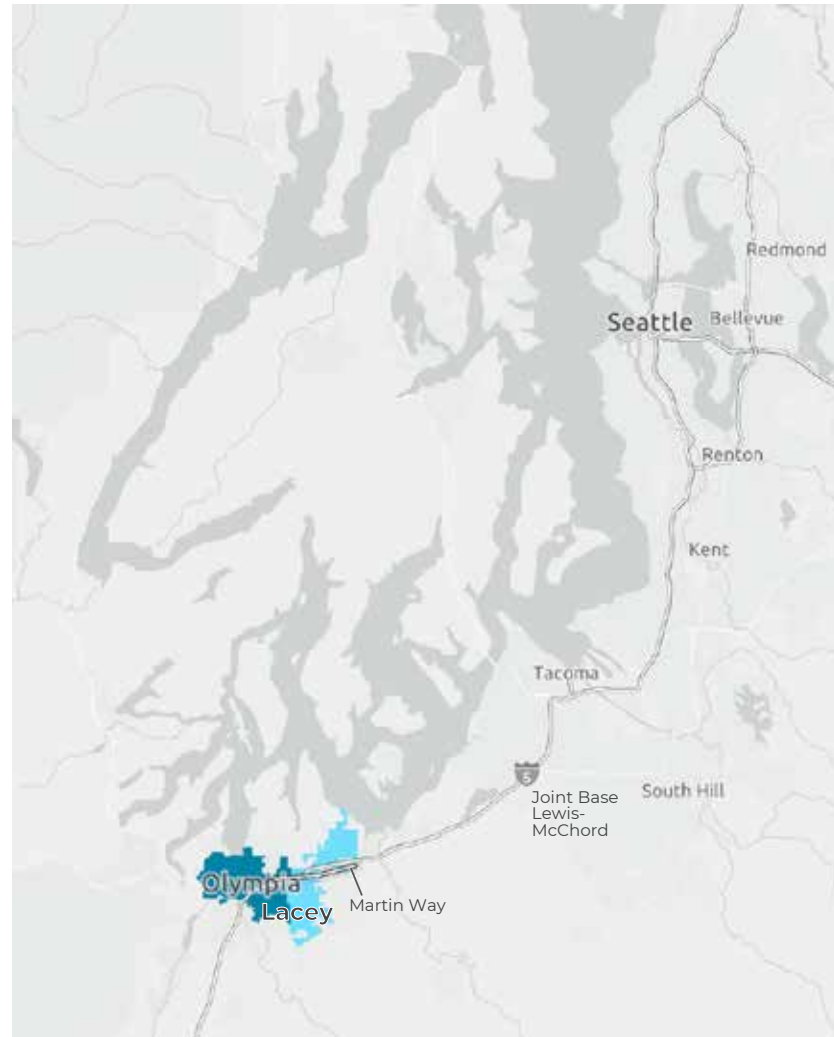
Introduction

Vision & Regional Context

Vision. The shared vision for the Martin Way Corridor is as an “attractive mixed-use, high-density residential and commercial area where people enjoy walking, shopping, working and living. Over time, it will transition away from automobile-dominated use to a more pedestrian-friendly streetscape that also encourages bicycling and supports high-capacity transit.”

Many cities in the Puget Sound region have experienced the type of development that aligns with this vision. In the Case Studies section, we document some of the efforts that have been made by cities to transition an auto-oriented highway corridor to a mixed-use, more walkable environment.

Regional Context. Proximity to Olympia (the state capital), the military base (Joint Base Lewis-McChord) and I-5 shapes a lot of the land use patterns in the region. The affordability of the area relative to cities closer to the Seattle urban core has attracted significant residential growth in the recent past. Looking forward, the area is poised to benefit further as a less centralized model of employment growth emerges from the pandemic.



Stakeholder Perspectives

Opportunities
Challenges/Barriers to Development

Stakeholder Interviews

Overview

An important step taken at the outset of this process was to interview a set of corridor stakeholders that have experience with real estate, economic development, leasing, and development within the corridor or region.

These stakeholders included developers, brokers, major employers, and other public agency partners. The purpose of the interviews was to gain a better understanding of the local and regional market and explore nuanced observations specific to the Martin Way Corridor.

Based on these interviews, market conditions are generally perceived as favorable for future economic growth and development across the region and within the Martin Way Corridor. The Martin Way Corridor faces similar challenges to that of other former and current highways in secondary or less prominent urban markets, with parcelized, underutilized, and fragmented land use patterns that make redevelopment challenging. The lack of a centralized area of focus exacerbates these challenges.

Stakeholder Perspectives

Opportunities

Residential Demand. Housing of all types, including market-rate, affordable, and student. There is pent-up demand (deficient by about 600 units over the past decade) that is slowly being realized and addressed with new construction. JBLM is experiencing a shortage of housing in the surrounding areas.

Healthcare Expansion. Continuing expansion of the existing healthcare cluster, including Providence and Kaiser, and the diversification of the healthcare industry. Providers are now increasingly taking a holistic, multifaceted approach to healthcare, looking at expanding residential and employment options with a greater lifestyle focus.

Public Improvements. Improvements to Martin Way are likely to improve the likelihood of new businesses and developments to locate on the corridor, but it is unlikely to change the economic feasibility of higher density development.

Redevelopment of Underutilized Property. The high proportion of underutilized properties, particularly in the Tanglewilde-Thompson Place section, might require assemblage for a large-scale redevelopment in keeping with the vision, but land remains at a price that offers a lower barrier to entry for investors. Encouraging redevelopment of existing property will require growth of other amenities, aesthetics, public improvements, and incentives.

Supportive Zoning. Current zoning designations support the vision for the corridor. Zoning is not seen as a barrier to development.

Transitional Corridor. Investors are becoming aware of lower cost locations, such as the MWC. As rents trend upwards of \$2 per square foot, higher density development types will start penciling.

Tax Credits. The availability of tax credit or abatement programs are critical for development feasibility. Low Income Housing Tax Credits are available to affordable developers, and Olympia's Multifamily Tax Exemption program (within 250 ft of Martin Way west of Lilly Road) is seen as a highly effective in incentivizing new apartment development. The development community would like to see these tools expanded.

Political Commitment. Public agency commitment to housing. Both Olympia and Lacey have adopted various elements of the Regional Housing Action Plan (HAP).

Favorable Market Conditions. Low interest rates, available land, and rent increases are improving prospects for higher density opportunities, especially nearer Olympia.

Stakeholder Perspectives

Challenges

Challenges or barriers to development can be grouped into one of five categories: physical, regulatory, political, financial, and market-based.

Challenge	Description
Market	<ul style="list-style-type: none"> • Despite rising rents, construction costs have risen so rapidly that most higher density products fail to pencil, especially vertical mixed use • Slow historic rate of new investment • Difficult to find office tenants; uncertain/unknown office forecast due to the pandemic
Financial	<ul style="list-style-type: none"> • Market is more cost-sensitive than other geographies in the region; requires an opportunistic approach to development • Recent multifamily development has been on vacant land; most sites on Martin Way require redevelopment • For most of the corridor, the current land use remains more valuable relative to the cost of the land than the potential return on investment for redevelopment.
Physical	<ul style="list-style-type: none"> • Development constraints limit a lot of areas in the corridor for new development. • Length of corridor; lack of central area of focus • Martin Way has the feel of a highway and is not oriented to pedestrian activity • Lots/sites are typically one parcel deep, which is difficult to redevelop or to build a dense development cluster; much of the corridor is likely to look similar in 20 years from a land use perspective
Regulatory	<ul style="list-style-type: none"> • Arduous SEPA process for new development; perception of little public agency assistance; many sites are contaminated because of former and current auto-oriented uses. • Permitting process – capacity issues that slow down the entitlement process • Zoning includes minimum density standards that are challenging to meet given current market conditions • CC&Rs typically prohibit mixed-use developments (e.g., Hawks Prairie, Costco area)
Political	<ul style="list-style-type: none"> • Lack of champions for the corridor • Private-sector and non-profit leadership appear indifferent • Perception of crime, homelessness, and vandalism discourages new investment

Existing Conditions

Demographics
Employment
Regulatory
Development
Transit

Existing Conditions

Demographics

The following pages in this section borrow from the Martin Way Corridor Current Conditions Report. This serves as an important baseline on which to build.

Population. The Martin Way Corridor is home to approximately 9,000 people. Two-thirds live in the area from Pacific Avenue to Marvin Road. One-third live between Marvin Road and Meridian Road, reflecting the density of housing. College Street to Carpenter Road has the fewest residents.

Projected Growth. The population of the corridor is projected to increase significantly over the coming decades, growing to 13,700 by 2045 (growth of 1.5 percent annually). This will drive demand for various amenities, services, and jobs.

Age. The age characteristics of MWC residents is similar to that of Thurston County, with 24 percent of the population aged 19 and under, 31 percent between 20 to 39, 24 percent between 40 to 59, and 21 percent 60 or older.

Income. Residents of the Martin Way Corridor experience higher rates of poverty than is typical in the surrounding communities. Two out of five corridor residents are considered cost-burdened, which means that they spend a high proportion of their income on housing, and one-fifth of households are considered severely cost burdened. These households typically have less income available for transportation, health care, and other needs. Cost-burden and poverty levels are highest in the westernmost section of the corridor, between Pacific Avenue and Lilly Road.

Tenure. The corridor is heavily renter-occupied (56 percent). About half of all corridor residents (49 percent) live in multifamily units and 10 percent live in manufactured housing (there are nine manufactured home parks in the corridor).

TRPC’s population estimates indicate that by 2045 two out of three corridor residents (64 percent) will live in a multifamily development, while less than a third (27 percent) will live in a single-family home.

Future development along the Martin Way Corridor is expected to be predominantly multifamily and renter occupied.

Corridor Sections	2017 Pop	2045 Pop	Annual Growth	Total Growth
Pacific - Lilly	1,654	2,831	1.94%	1,177
Lilly - College	1,170	2,122	2.15%	952
College - Carpenter	244	287	0.58%	43
Carpenter - Marvin	2,732	4,302	1.63%	1,570
Marvin - Meridian	3,242	4,167	0.90%	925
Martin Way Corridor	9,043	13,708	1.50%	4,665

Source: TRPC MWC Existing Conditions Report

Existing Conditions

Employment

Regional Conditions

Government. Proximity to the state capital contributes to a high proportion of government workers. These jobs are generally more resilient to economic downturns than most. In addition to the statehouse, Joint Base Lewis-McChord borders the eastern edge of Thurston County, and many military personnel live in the region.

Other Sectors. After government, the next-largest sectors in the region are trade, transportation, utilities, and education and health services. Combined, these sectors provide about as many jobs as the government sector. Among trade, transportation, and utilities, nearly three-fourths are retail trade jobs, which have seen a major decline in recent quarters due to the coronavirus pandemic. Leisure and hospitality also makes up a good portion of jobs, and combined with retail trade, the two sectors account for more than 20 percent of the total workforce in the region.

Major Employers. Some of the largest private employers are Providence St. Peter Hospital (1,700 employees), Walmart Supercenter (1,000 employees), Safeway (900 employees). The median household income is significantly higher than the national level, but the region's limited income growth is reflective of these lower-paying sectors.

Education/Talent. A relatively high proportion of educated residents contributes to the above-average incomes here. The metro's percentage of those with a bachelor's degree or higher is greater than that of most small metros in Washington. In addition, Saint Martin's University, a private university in Lacey, enrolls around 1,600 students and employs more than 200 academic and administrative staff members. South Puget Sound Community College (SPSCC) has a campus located in Lacey near St. Martin's and The Evergreen State College. TESC's campus is further away in West Olympia near SPSCC's main campus .

Local Conditions

More than 13,000 people work at locations in the Martin Way Corridor.

The corridor includes a wide range of businesses, including health and medical services, big box retail, small businesses, restaurants and other food services, professional offices, hotels, schools, and government agencies.

The westernmost section of the corridor, Pacific Avenue to Lilly Road, has the greatest concentration of jobs currently, and is likely to see the greatest of number of new positions over the coming decades, while the section from Lilly Road to College Street is anticipated to see the greatest rate of job growth.

In both sections, employment trends are strongly correlated to the continued growth of the health services industry, one of the Thurston County region's strongest employment sectors.

Projected job growth is otherwise distributed evenly across the corridor—as a whole, the corridor is anticipated to gain nearly 6,000 new jobs over the next twenty-five years, an increase of 43 percent over current conditions. This outcome is heavily dependent, however, on the future of employment in the retail and services sectors.

Existing Conditions

Regulatory & Land Use

Physical Conditions. Twenty percent of the corridor remains in a more natural condition—either as forest, wetland, or other open space. Along its length, Martin Way crosses three important stream systems, or watersheds, and cuts through extensive wetlands and other habitat (Indian Creek, Woodard Creek, Woodland Creek). Environmental conditions influence the type of land use that has developed along Martin Way, and in turn these resources are impacted by activity within the corridor. For example, the concentration of wetlands around Ensign Road and in the section of the corridor from College Street to Carpenter Road limits the potential for future development in these locations.

Zoning. Current zoning in the corridor largely corresponds with existing use, with mixed use and commercial zoning directly on Martin Way, low- and mid-density residential zones around the edges, and limited areas identified for open space and industrial use. Nearly half the corridor is zoned to allow a mix of commercial and residential uses (mixed-use) (46 percent). Both Olympia and Lacey have specific high-density zoning designations that correspond to their visions for these sections of the corridor.

One area of discrepancy between current use and zoning are the large portions of the College Street to Carpenter Road section Lacey has zoned as Central Business District, although these areas have remained largely undeveloped.

Based on Leland Consulting Group’s understanding of market conditions and input from developers during the stakeholder interviews, zoning is not considered a major barrier to development.

Land Use. Martin Way alternates between areas that are highly urbanized, areas of light development, and areas that are thickly forested and undeveloped. Almost three quarters of the corridor is considered development, albeit at a medium or low intensity.

Land uses in the corridor are diverse, with a wide variety of large and small commercial businesses directly on Martin Way, and low- to moderate-density neighborhoods nestled just a parcel back from the street. Most of the light manufacturing that populated the corridor historically has moved out, leaving just a handful of remaining parcels with industrial uses.

Land Cover Class	Percent Cover
Developed	72%
High-intensity Developed	16%
Medium Intensity Developed	27%
Low Intensity Developed	29%
Developed Open Space (i.e. landscaped parking lots)	8%
Forest	14%
Deciduous Forest	2%
Evergreen Forest	8%
Mixed Forest	4%
Wetland	3%
Other Open Space (Pasture, grassland, cultivated, scrub/shrub, bare land)	3%

Source: TRPC MWC Existing Conditions Report

Existing Conditions

Development

Development Opportunities. The corridor has only a limited supply of remaining vacant land, but the potential for substantial redevelopment of mixed use and commercial areas. The section from Carpenter to Marvin Road has the greatest cluster of parcels with redevelopment potential (100 acres), most of these very high (58 acres)

The section from Pacific Avenue to Lilly Road also has substantial redevelopment potential, but these parcels are more likely to be constrained by wetlands and other critical areas. This section has the greatest amount of vacant land, however, most of this is tied to two parcels along Ensign Road that are zoned as high-density multifamily and currently owned by the Sisters of Providence who founded the Providence St. Peter Hospital, just north of the corridor boundary. The easternmost section of the corridor, Marvin Road to Meridian Avenue, has the least amount of redevelopment potential since much of the development there is newer, though that section does still have some remaining vacant land.

Acres	Pacific - Lilly	Lilly- College	College- Carpenter	Carpenter- Marvin	TOTAL, Martin Way Focus Area	Marvin- Meridian	TOTAL, Martin Way Corridor
Developable Land (Acres)							
Vacant Single Lots	1.0	0.0	0.0	0.8	1.8	0.0	1.8
Vacant Subdividable Land	51.8	15.5	4.6	44.5	116.5	35.4	151.8
Partially Used Subdividable Land	10.3	7.8	0.0	0.0	18.2	3.6	21.7
Subtotal	63.2	23.2	4.6	45.4	39.0	136.4	175.4
Redevelopable Land (Acres)							
Very High	57.2	19.3	11.0	57.8	145.3	12.6	157.9
High	16.6	17.1	5.9	17.3	56.9	5.1	62.0
Medium	20.1	53.4	25.9	24.5	124.0	5.3	129.3
Subtotal	93.9	89.8	42.8	99.5	326.1	23.0	349.1
TOTAL	157.1	113.1	47.5	144.9	462.6	62.0	524.5

Source: TRPC MWC Existing Conditions Report

Existing Conditions

Transit

Several routes, including The One, 62A&B, 612 and 620, serve the Martin Way Park & Ride lot, just east of the Martin Way-Interstate 5 interchange (Exit 109). The lot includes 318 parking stalls and sees use seven days a week. In 2019, the lot had an average of 140 vehicles on weekdays and 85 vehicles on weekend days

Martin Way is a priority corridor for Intercity Transit. It accounts for a significant portion of their total ridership and is a critical east-west route for transit users to access a variety of destinations.

A future Bus Rapid Transit line is planned for the Martin Way Corridor. It will connect downtown Olympia and terminate at Marvin Road in the eastern Lacey section of the corridor. This is likely to increase demand for housing in the corridor.



Source: TRPC MWC Existing Conditions Report

Case Studies

Aurora, Shoreline
Bridgeport Way, University Place
Bothell Way, Bothell
68th Avenue, Kenmore

Case Studies

Overview

Case studies serve as an educational tool that can help public agencies understand how similar geographies or markets typically respond to public investments or changes.

For this study, we selected four Washington-based case studies that currently share or previously shared (prior to investments) similar characteristics with the Martin Way Corridor, including the primary arterial's functionality as a highway, the type of planned streetscape or transportation improvements, and status as an outlying or secondary market.

The four selected case studies are:

- Aurora Blvd – Shoreline
- Bridgeport Way – University Place
- Everett Highway – Bothell
- Hwy 522/Bothell Way – Kenmore

Lessons Learned:

- Corridor redesigns have been most successful when there is City ownership, and/or when a City sees the corridor as their "Main Street," and therefore have been willing to invest tens of millions of dollars
- The private-sector land use response to corridor redesign is typically slow. Market conditions, land availability, and the availability of financing tools and incentives are more relevant factors.
- Most of the new construction along highway corridors (current and former) that fits the description of pedestrian-oriented, TOD, or mixed-use has been the result of targeted public investments in land and real estate development.
- Multifamily apartments have dominated the development

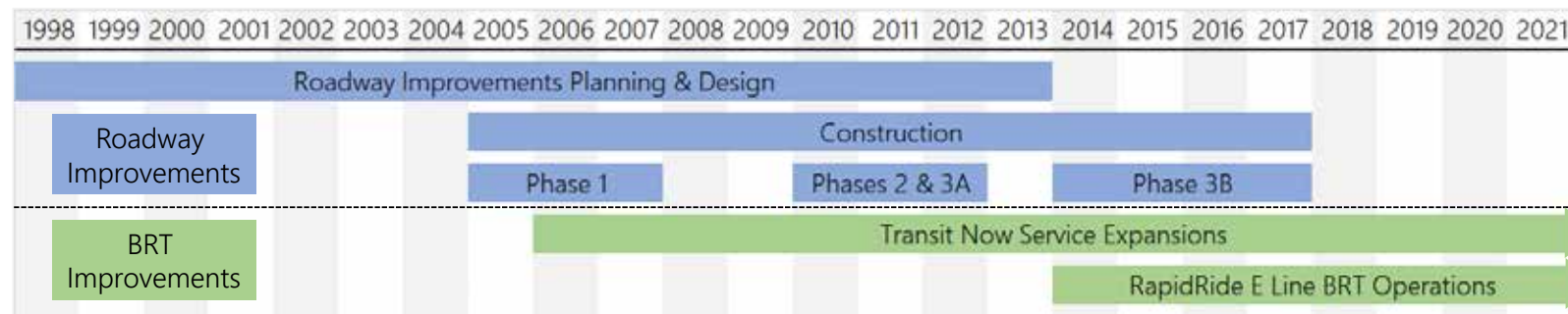
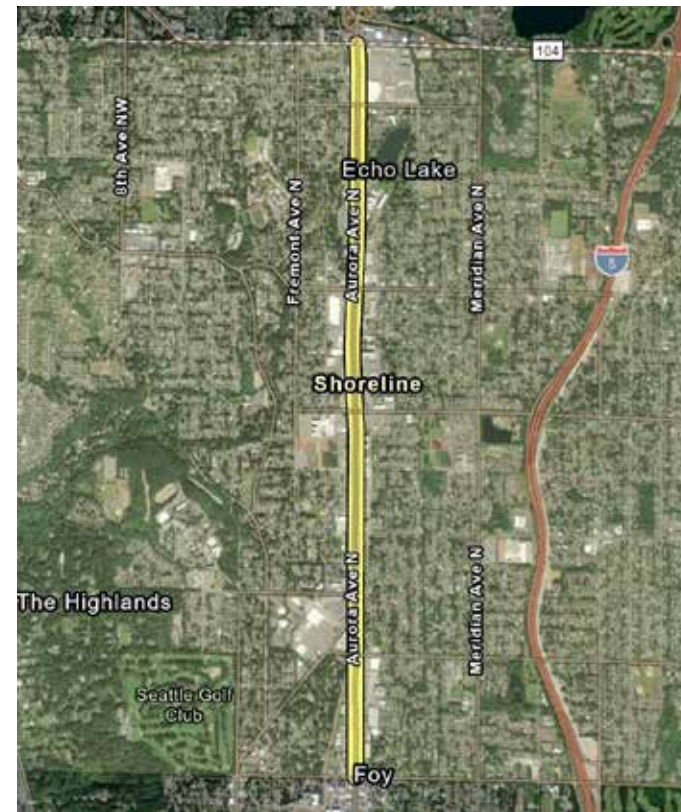
Case Studies

Summary

	Aurora Corridor Shoreline	Bridgeport Way University Place	Bothell Way Bothell	68 th Avenue Kenmore
Length of Corridor	3 miles	1.5 miles	0.4 miles	1.7 miles
Time Period of Improvements	1998 – Present (23 years)	1996 – Present (25 years)	2006 – Present (15 years)	1999 – Present (22 years)
Project Elements				
Addition of BRT	Yes	No	No	No
Pedestrian + Bicyclist Improvements	Yes	Yes	Yes	Yes
Zoning or Subarea Plan	?	Yes	Yes	Yes
City-Led Redevelopment Effort	No	Yes	Yes	Yes
Results				
Private Sector Improvements	Yes	Yes – 2:1 private to public investment	Yes – transition to high density uses	Yes

Aurora Corridor Shoreline, Washington

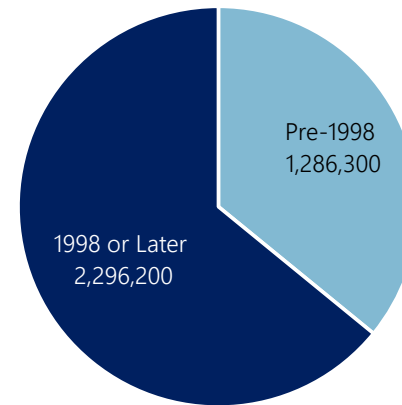
- 3-mile state highway corridor
- Initial goals were to address pedestrian safety deficiencies and improve traffic flow
- Economic development was a secondary goal that became more important in later project phases
- The project has been fully complete for about four years
- BRT service was added in this corridor seven years ago



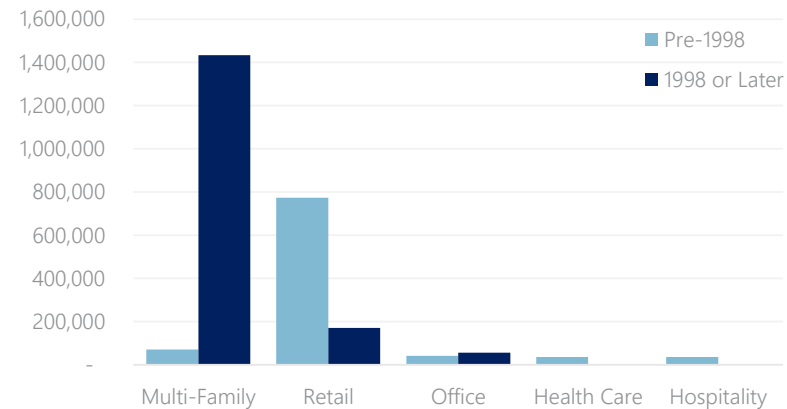
Aurora Corridor Shoreline, Washington

- 36% of development square feet took place prior to the roadway improvements that began in 1998
- 64% of development took place after roadway improvements began in 1998
- The majority of the corridor’s retail development was built prior to 1998
 - About 775,000 square feet
- Since 1998, the bulk of development has been apartment developments
 - Nearly 2,000,000 square feet
- 190,000 square feet of retail, office, industrial, and one multifamily building dating from the 1950s to 1980s were demolished

Square Feet of Development
Pre- and Post-Roadway Improvements
Costar, 2021



Types of Development by Square Feet
Pre- and Post-Roadway Improvements
Costar, 2021



Aurora Corridor Shoreline, Washington



Bridgeport Way

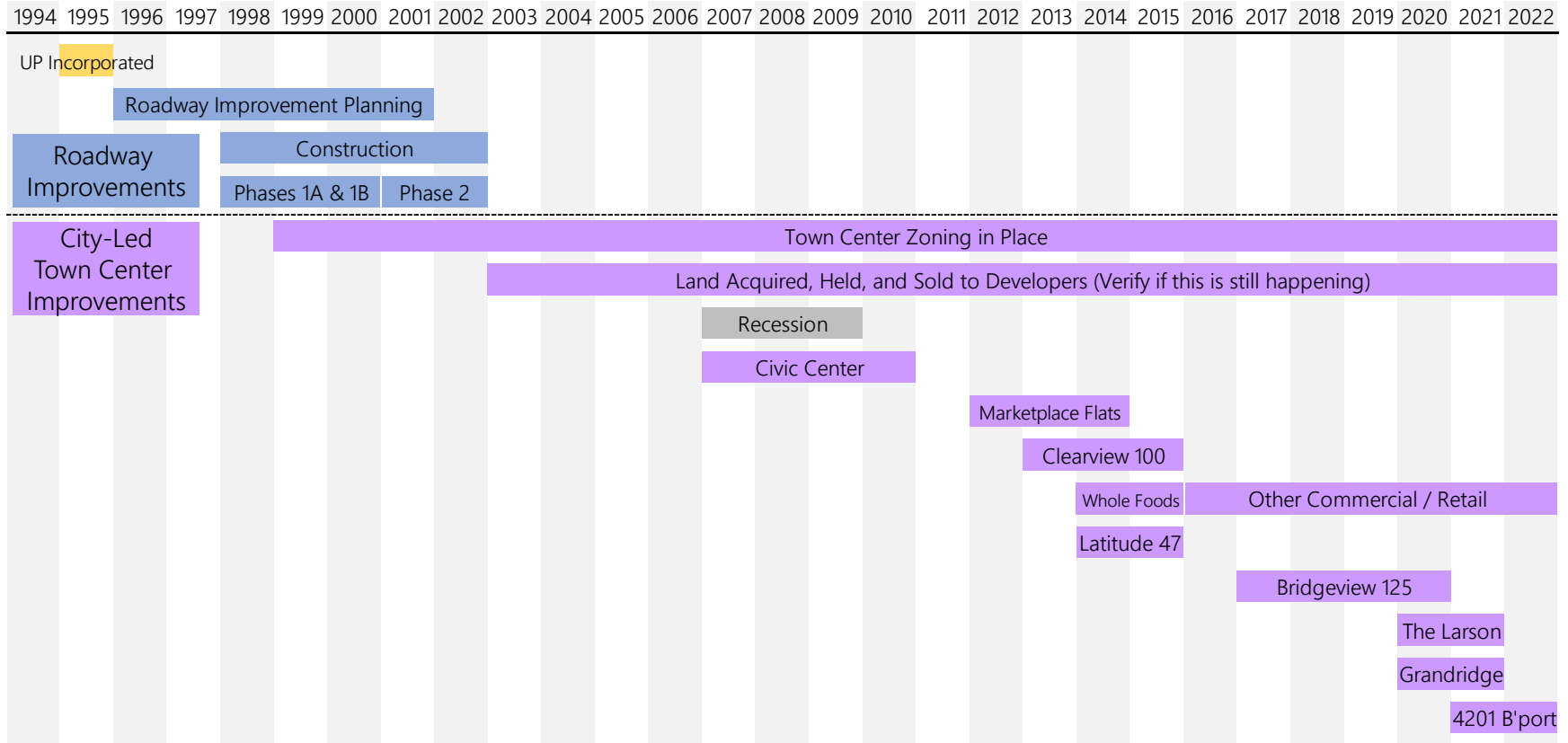
University Place, Washington

- 1.5-mile state highway corridor
- Initial goals were to add sidewalks and increase pedestrian and driver safety
- Includes a substantial Town Center component
- The City of University Place not only completed corridor redesign, it also acquired 22 acres of property, built a parking garage, and conducted public-private partnerships (PPPs) to bring in Whole Foods, 500 housing units (3 projects), a new City Hall and library, plaza, etc.
- Most redevelopment is nodal (Town Center)
- Estimated \$270 - \$320 million in private investment from Town Center development
- Private market has not been catalyzed into action: about \$2 in private investment for each \$1 in public investment (Kevin Briske)



Bridgeport Way

University Place, Washington

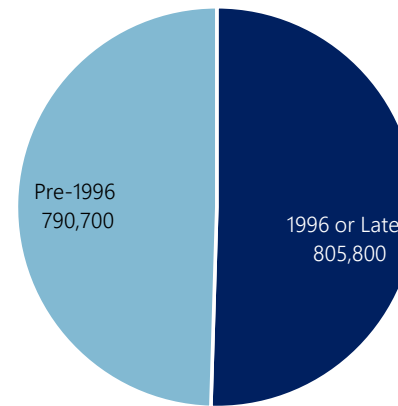


Bridgeport Way

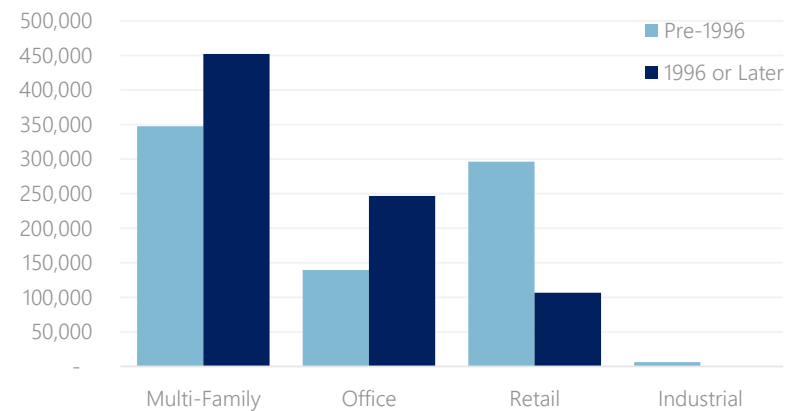
University Place, Washington

- 50% of development square feet took place prior to the roadway improvements that began in 1996
- 50% of development took place after roadway improvements began in 1996
- Similar to the Aurora Corridor, more of the corridor’s retail development was built prior to 1996
- Since 1998, multi-family and office development are more prevalent than they were before 1998
- 65,500 square feet of retail and office buildings dating from the 1960s to 1990s were demolished

Square Feet of Development
Pre- and Post-Roadway Improvements
Costar, 2021



Types of Development by Square Feet
Pre- and Post-Roadway Improvements
Costar, 2021



Bridgeport Way

University Place, Washington



Bothell Way

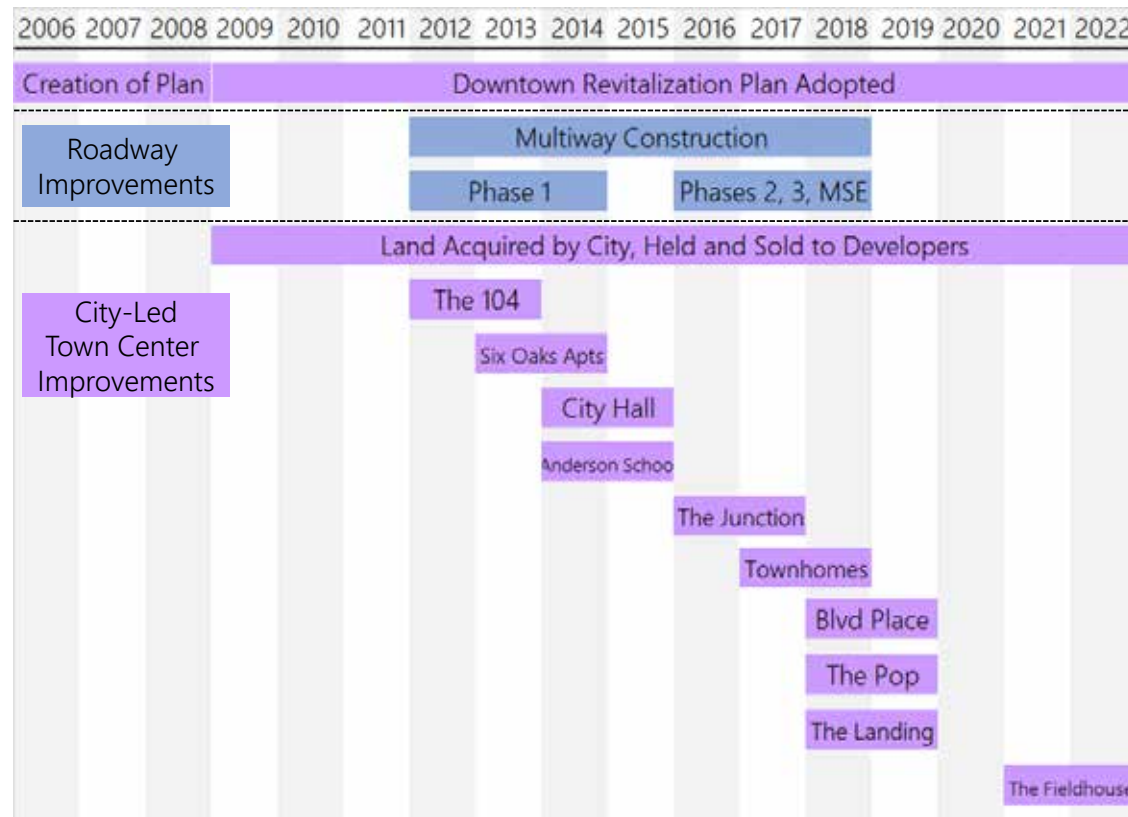
Bothell, Washington

- 0.37-mile former state highway corridor
- Goal was to transform downtown portion of Bothell Way into a “multiway boulevard” with parallel outer roadways for slower vehicles, pedestrians, and bicyclists
- City bought 20+ acres of land for the purpose of creating a downtown
 - Components include:
 - City Hall (2015)
 - Multifamily
 - Townhomes
 - Hospitality
- Total downtown area shown here totals 45 acres



Bothell Way

Bothell, Washington

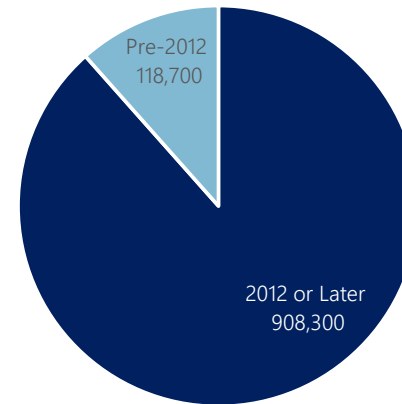


Bothell Way

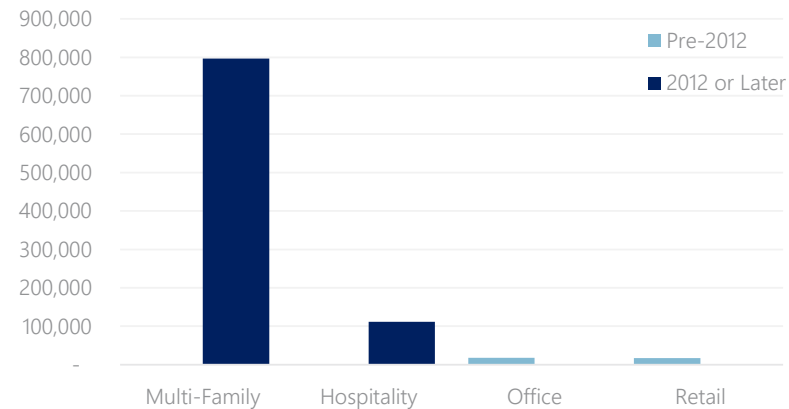
Bothell, Washington

- 12% of development square feet took place prior to the roadway improvements that began in 1996
- 88% of development took place after roadway improvements began in 1996
- 95,000 square feet of buildings constructed during the 1940s to 1960s were demolished for new development (not included in pie chart)
- Similar to the other case studies, retail (and office in this case) was built prior to the roadway improvements and city-led development efforts that began in 2012
- Since 2012, the bulk of development has been multi-family, with a small amount of hospitality. There are parcels available for commercial development, but no new retail or office has been built since 2012.

Square Feet of Development
Pre- and Post-Roadway Improvements
Costar, 2021



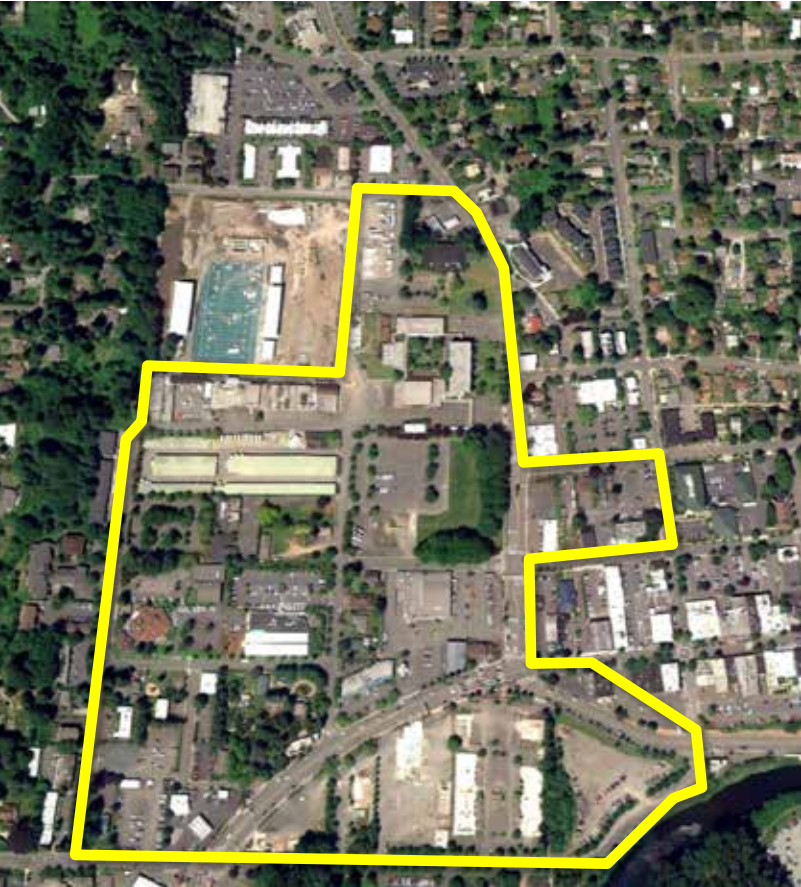
Types of Development by Square Feet
Pre- and Post-Roadway Improvements
Costar, 2021



Bothell Way

Bothell, Washington

June 2010



August 2020



Bothell Way

Bothell, Washington

November 2015 Streetview



June 2019 Streetview



Six Oaks - 2014 - 203 Units



The Junction - 2018 - 130 Units



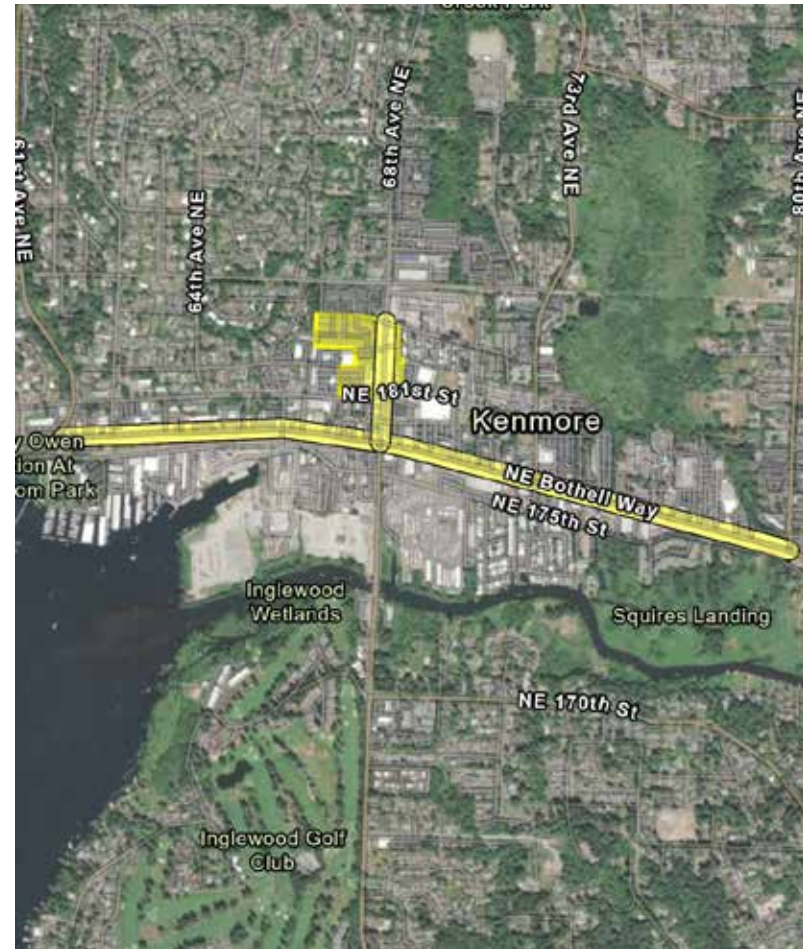
Anderson School Hotel - 2015 - 72 Rooms



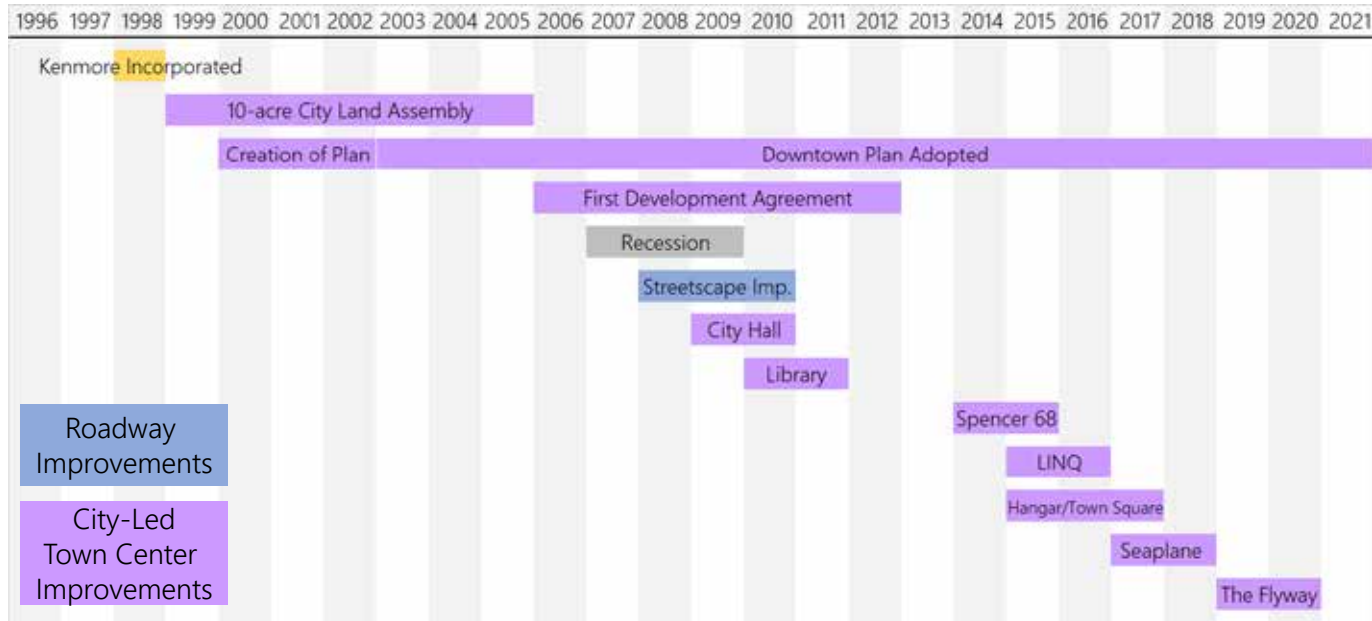
68th Street

Kenmore, Washington

- 1.7-mile state highway corridor + 0.2 mile local street
- Goal was to add pedestrian facilities and create a downtown
- City acquired 9.6 acres of land for the purpose of creating a “downtown”
 - Components
 - City Hall (2010)
 - Library (2011)
 - Hangar/Town Square (2017)
 - Multifamily
 - Restaurant
- Total downtown area shown here measures 10.7 acres



68th Avenue Kenmore, Washington

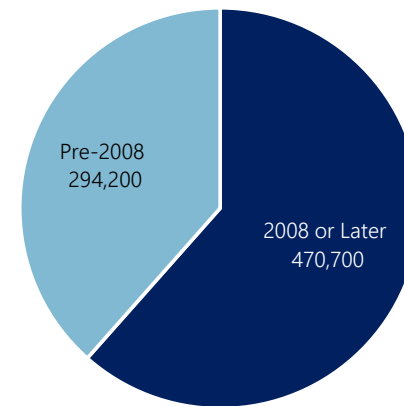


68th Avenue

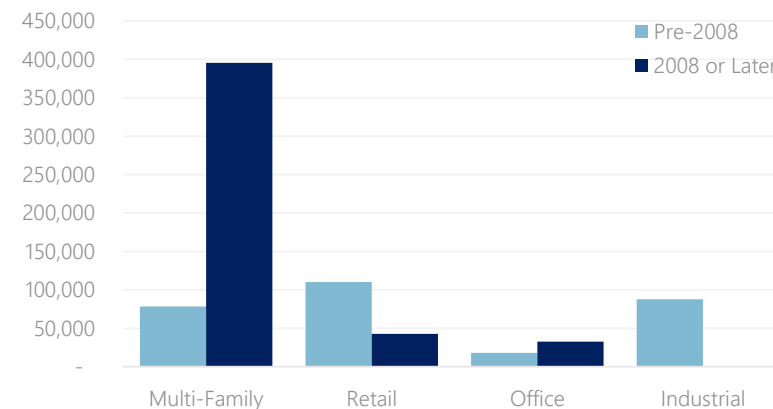
Kenmore, Washington

- 38% of development square feet took place prior to the roadway improvements that began in 2008
- 62% of development took place after roadway improvements began in 2008
- 46,300 square feet of buildings from the 1960s – 1970s were demolished for new development (not included in pie chart)
- Similar to the other case studies, more retail (and industrial in this case) was built prior to the roadway improvements that began in 2008
- Since 2012, the bulk of development has been multi-family

Square Feet of Development
Pre- and Post-Roadway Improvements
Costar, 2021



Types of Development by Square Feet
Pre- and Post-Roadway Improvements
Costar, 2021



68th Avenue Kenmore, Washington



August 2011 Streetview



October 2018 Streetview



LINQ - 2017 - 94 Units



The Hangar & Town Square - 2017



The Spencer 68 - 2015 - 222 Units

Market Conditions

National & Regional Trends

Local Market Overview

Opportunities

Challenges

Development Character

Focus Areas

National Trends Overview

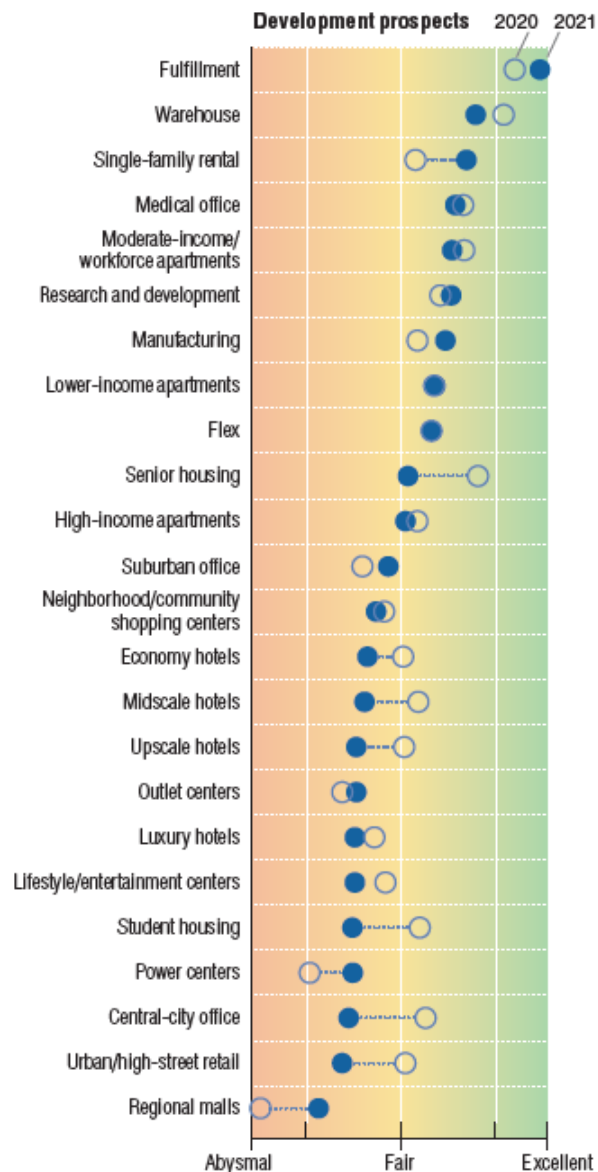
The figure at right from the Urban Land Institute’s annual Emerging Trends publication displays the development prospects for a variety of land uses in 2020 and 2021. Industrial, medical office, and housing products are considered the most promising development types.

The ongoing COVID-19 pandemic is one of, if not the most significant market disrupter for many decades. It has impacted the market in a number of ways, including:

- Increasing pent-up demand for housing (rental and owned) as a result of a constrained supply
- Increasing demand for suburban or outlying locations as people seek housing options in more affordable areas that provide access to recreational opportunities

There were several trends that had emerged pre-pandemic that are set to continue as the recovery ensues. These include:

- E-commerce’s increasing market share of retail (ecommerce increased by 30% during the pandemic) and the continuing fall of regional malls.
- Demand for experience-based commercial (retail and employment)
- Rising demand for health services and senior housing product as the population ages



Source: ULI Emerging Trends

Regional Development Trends

Market Area

Development along the Martin Way Corridor is impacted by the surrounding area, including downtown Olympia, JBLM, and Hawks Prairie.

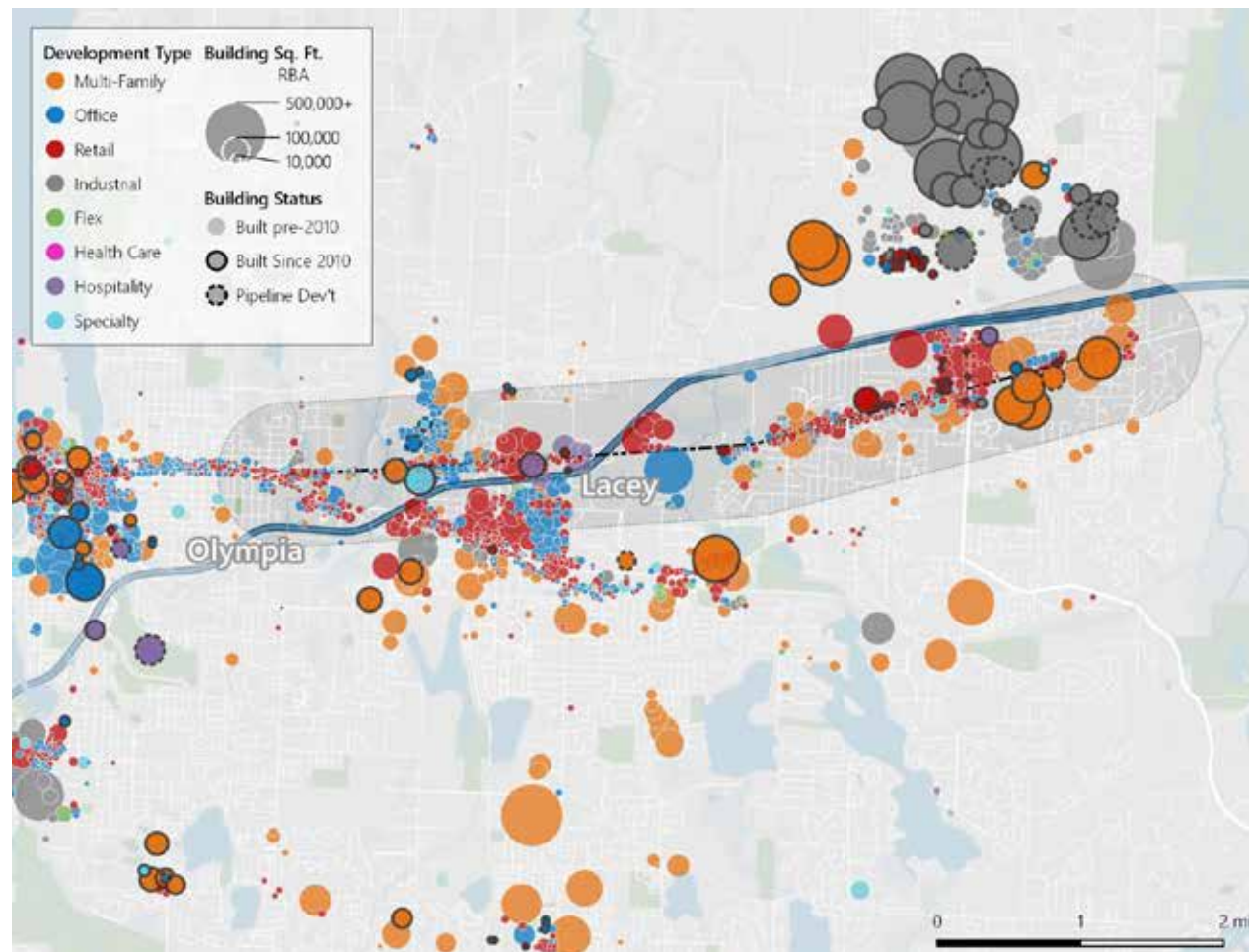
Housing development has seemingly occurred in tandem with this growth. New multifamily apartments have featured heavily in the Martin Way Corridor, accounting for 66 percent of all new development since 2010.

Clusters of **retail** space are primarily located near the corridor's I-5 interchanges.

Office space and healthcare uses are almost entirely located in Olympia.

A substantial amount of **industrial** development has occurred to the northeast of the corridor, bringing major employment growth.

Hotel development, including a new project, has clustered near College Street.



Source: Costar

Regional Market Trends

Multifamily Residential

The national multifamily market stabilized in early 2021 after a 2020 that saw weakening market dynamics. Seasonality, widespread vaccinations, an improving economy, additional fiscal stimulus and a return of office workers will all contribute to further multifamily market improvement.

The regional market shows positive indicators for new development. Regional population growth over the past decade has been robust, largely thanks to the economic resilience of the Puget Sound region and high levels of inflow migration from those priced out of larger cities. During a time when office-using employees can work from anywhere, lower priced markets like Olympia and Lacey have benefitted. The primary competition for apartment development for the Martin Way Corridor is Downtown Olympia and further south along Ruddell Road and Yelm Highway.

Vacancies have remained tight at less than five percent over the past few years, even with a protracted wave of new development. An influx of renters from bigger cities during the pandemic has created a strong demand base for apartments. Rent has historically been lower than the national average, but rents have grown swiftly over the past decade due to relatively tight vacancies. Rent growth has maintained strong levels despite the pandemic.

The region benefits from relatively consistent renter demand as a result of the high proportion of blue-collar workers, government employees, students, and a younger-than-average population. There are several colleges in the area, including St Martins in Lacey. Local colleges have long been a perennial source of rental housing demand, but the transition to distance learning could soften absorption in areas that cater to students. Over a longer timeframe, the ageing population is expected to increase demand for senior housing products.

Prior to the pandemic, investors targeted the Olympia metro market due to these steady demand drivers and relative affordability to nearby Seattle. Sales volume since then has slowed though, due in part to the implementation of the graduated real estate excise tax (REET) in January (according to some developers) and a pullback in investment as a result of economic uncertainty.

Construction has surged recently. The market area has experienced a construction surge, with 2,200 units opening over the past five years and 140 units under construction (reflecting one-quarter of total inventory). Development activity has mostly been focused on garden style apartments in Lacey and Olympia proper (outdoor-style complex up to three stories in height—i.e., low rise—and usually have parking surrounding the complex in surface lots). Notable recent deliveries include The Wolff Company's 240-unit Martingale, which opened in Lacey in early October 2020. Projects under construction include the 48-unit Mulberry Place near Lacey. This garden-style community is set to open in mid-2021 with a unit mix that contains mostly one-bedrooms, a relatively new phenomenon in the Olympia market.

Local Market Conditions

Recent Multifamily Development

Of the 14 new projects built in the last five years or currently under construction, six have been multifamily. Only Merritt Manor is in Olympia, the other five are clustered in Lacey. Images from each project are included at right in the order each project is listed in the table.

Each of these projects are low-density (3-4 story), surface parked (versus a structured parking garage), and wood-framed construction. This is considered the cheapest construction type. Market-rate rents for new projects are upwards of \$2.00 per square foot, which is considered an important threshold for increasing the feasibility of higher density (and more expensive) projects. However, this recent rent growth has been outpaced by the rapidly increasing cost of construction.

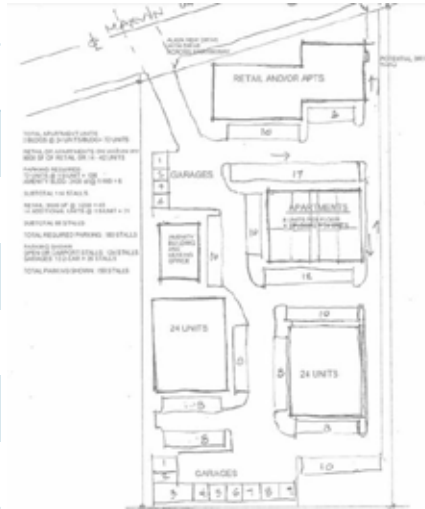
Project Name	No. Units	Year Built	Rent Type & Avg. Rent Per Square Foot	Lot Acres	Units per Acre
Merritt Manor	82	2020	Affordable (\$1.22 PSF)	5.72* (2.95)	27.8
Martin-gale	240	2020	Market (\$2.17 PSF)	32	21.4
Revel Lacey	135	2018	Independent Senior Living	6.66	20.3
The Marq on Martin	248	2017	Market (\$2.06 PSF)		20.6
Copper Wood	228	2017	Affordable (\$1.09 PSF)	9.66	23.6
8819 Martin Way	96	Under Constr.	Market	3.54	27.1



Development Example

Gayteway Apartments

Address	8819 Martin Way
Units	96
Uses	Market-rate Apartments
Acres	3.54
Density	27 units per acre
Parking	120+ surface
Zoning	MHDC



Development character is consistent with recent multifamily construction (3-story, surface parked)

- Original application included potential ground floor retail, highlighting the potential challenges of mixed-use development in the MWC.
- Site plan reflects minimum lot acreage needed for similar development types
- Sold in June 2018 for \$1.5 million (\$9.7 per square foot); \$15,600 per door

Year	Building Value	Land Value	I:L Ratio
2021	\$0	\$1.31m	0
2020	\$522,600	\$1.34m	0.39
2019	\$395,000	\$1.36m	0.29
2018	\$439,200	\$1.15m	0.36



Site conditions during at sale (2018):

Anecdotal evidence from developers indicate that land must now cost \$10,000 to \$15,000 per door in order for projects to pencil.

Market Trends

Retail

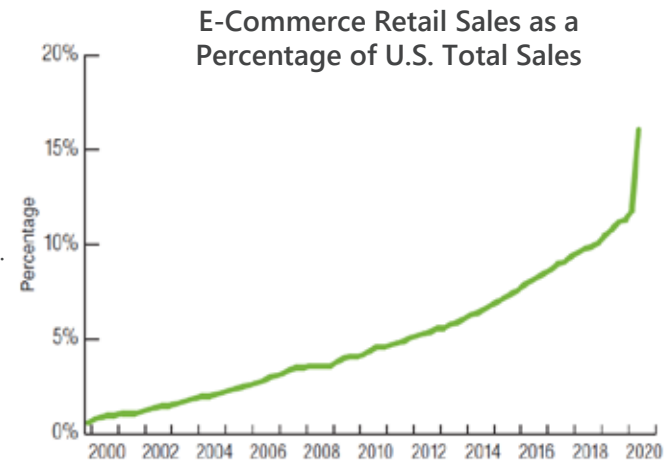
National Trends. The commercial real estate environment, and particularly the retail sector, remains uncertain thanks to the pandemic and ecommerce’s ever-increasing share of the market. It is probable that retailers will continue to face turbulence for the foreseeable future, impacting demand, rent growth, and capital markets in the process.

Regional Trends. The market area contains 6.1 million square feet of retail space. Retail space per new resident has been steadily declining for the past few decades, averaging about 200 square feet of new space in 2000 to practically zero in 2020. While approximately 100,000 square feet of new space is proposed in the corridor over the next few years, this trend is set to continue as consumer habits shift and ecommerce captures an increasing share of the market.

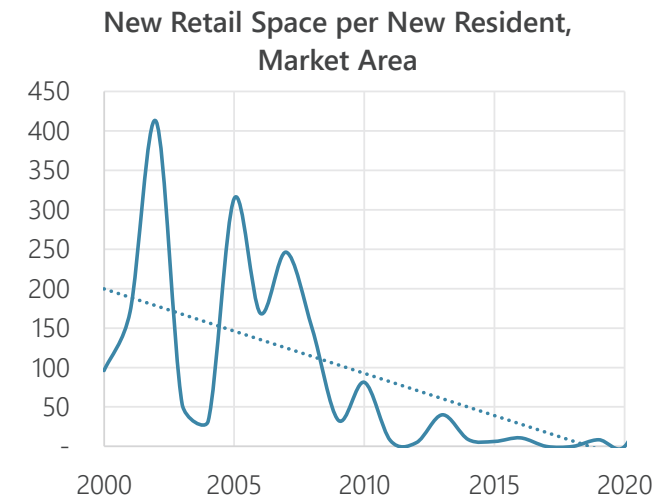
Local Trends. The Martin Way Corridor is dominated by two main retail centers: the South Sound Center (Woodland District) and Hawks Prairie Village Mall and the nearby big box centers, all in Lacey, which includes Walmart, Costco, Best Buy, and Home Depot. Despite the aforementioned challenges, each center is considered strong performers with few vacancies, relatively high average rents, and national credit tenants. Rents generally average between the high \$20s to the high \$30s per square foot. Based on LCG’s understanding of the market—supplemented by stakeholder interview findings—demand is expected to continue for quality retail with strong anchors in eastern sections of the corridor, especially as residential growth continues in the region.

However, there are few locations along the corridor that could accommodate this type of development—nor does it fit with the vision for the MWC. New commercial spaces in mixed-use buildings may be feasible as market conditions improve. These tenants may include foodservice or drinking establishments, medical offices, or small professional or financial services.

Martin Way Corridor Study | Market Study



Source: U.S. Census Bureau



Source: Costar, ESRI

Market Trends

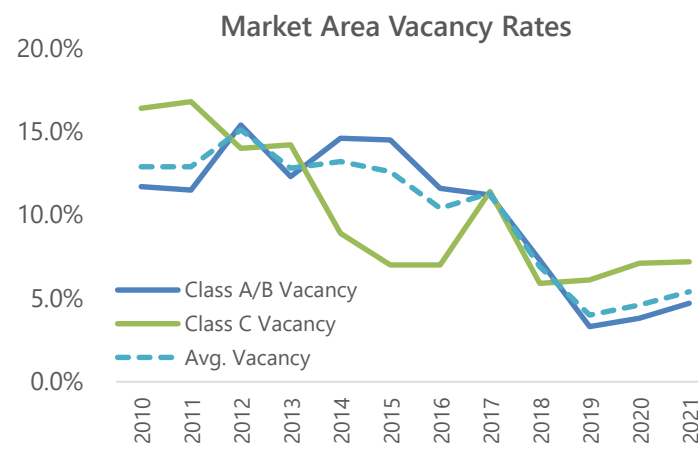
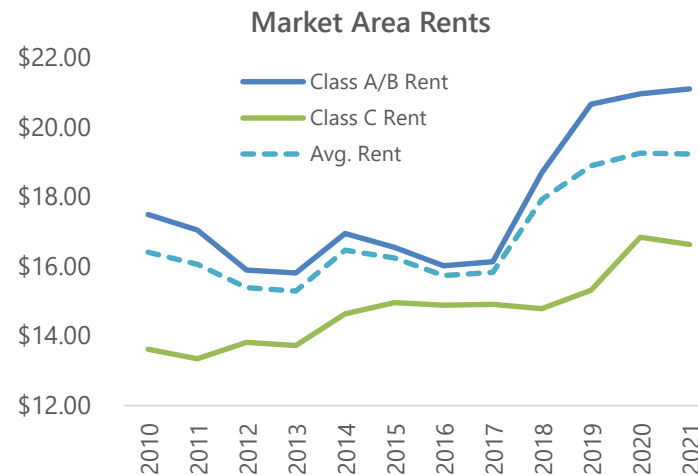
Office

National Trends. With continued easing of pandemic-related occupancy restrictions, flexible space options are increasingly becoming a key component of companies’ short- and long-term strategies for returning their workforces to the office. The rise of remote working over the past year has greatly accelerated the acceptance of flexibility in terms of where and how employees will work. This may include allowing employees to work outside of the traditional central office location and from certain satellite locations nearer their homes.

Regional Trends. The local office market, which includes medical office, totals 3.1 million square feet of inventory. Downtown markets remain disproportionately impacted by the COVID-19 pandemic, although the Puget Sound region’s office employment, which is concentrated in the tech industry, is relatively insulated from long-term employment loss.

Local Prospects. While the office outlook is unclear, trends suggest a more positive outlook for local office prospects in the Olympia-Lacey market area, particularly given the stability that the government and healthcare sectors bring. While rents in older, more dated buildings have stagnated, rents for newer Class A/B space (which typically possess the highest-quality amenities, construction, access, and management) experienced significant growth between 2019 and 2020. There is only one Class A office space in the Martin Way Corridor—a 28,000 square foot medical office building on Lilly Road that was built in 2006. All office deliveries over the past 20 years have been Class A and B.

New development is likely to cluster near existing developments in the western sections of the Martin Way Corridor, especially near the existing healthcare cluster.



Market Trends

Hotel

National trends. Nationwide annual hotel demand dropped by 37% in 2020, with U.S. hotels suffering the worst annual occupancy level in 2020 since the Great Depression in the 1930s. Social distancing continues to constrain group demand and convention hotels suffered the greatest declines in profits because of the slowdown in office-using employee travel. Leisure travelers remain the most dependable source of demand for U.S. hotels.

Regional trends. Almost every hospitality metric available show historic lows for the Southwest Puget Sound due to the COVID-19 Pandemic. Occupancy rates are hovering just over 50 percent, average daily room rates are about \$84, revenue per room is about \$48. None of these read well for new hotel prospects. Because of the risk and cost involved with hotels, they are usually a “follow-on” use. Hotel investors look for areas experiencing significant growth in high-income industry sectors, major tourism destinations, or other unique differentiators. Investors utilize STR (a data benchmarking company) reports to gauge the hotel market, and typically look for an occupancy rate of at least 70 percent across a spectrum of hotels.

The hotel industry is expected to bounce back as workers return to offices and business and leisure travel resumes. As the industry recovers, new investments will be made in proven locations with robust employment or tourism. Proximity to the state capital, JBLM, and substantial new employment growth in Hawks Prairie will likely drive long-term demand for hotels in the region.

The Martin Way Corridor is dominated by economic lodging with a limited number of midscale product. Demand for luxury and upscale lodging is typically limited to downtown environments or mixed use, walkable locations.

Market Trends

Industrial

National Trends. The national industrial & logistics market had its strongest year on record in 2020 despite a pandemic that caused a severe economic downturn. Tenants moved into facilities in droves to serve a rapidly growing online consumer base and increase their safety stock to avoid inventory disruptions that plagued the past year. All types of occupiers increased their presence in big-box last year to serve growing populations, be near expanding logistics hubs, and take advantage of new government incentive programs.

Regional Trends. The Puget Sound's industrial market is among the strongest in the nation, with growth fueled by the e-commerce, energy and life sciences companies that is delivering above-average returns for investors. Building values, land prices and rents are steadily increasing.

Local Opportunities. While the Martin Way Corridor could capitalize on these trends due to its proximity to I-5 and accessibility to major growth markets, these development types do not fit within the vision for the corridor. These developments also require large, vacant, flat tracts of land, which are unavailable in the corridor. We expect, the Hawks Prairie area, however, to continue to see major development of this type, creating many jobs and thereby generating additional demand for a variety of housing options, amenities, and services.

Local Market Conditions

Recent Commercial Development

Of the eight commercial projects built since 2015 along the Martin Way Corridor, two were self storage facilities and three were drive-through fast food restaurants. Two of the eight were built in the Olympia section of the corridor, including the Hampton Inn (top image). Most developments are single-story and surface parked, which is reflected by the low floor-area-ratios. These ratios are not reflective of a mixed-use, pedestrian-oriented environment.

Only one office building has been built—BioLife Plasma Services—a purpose-built medical development toward the eastern section of the corridor, reflecting the lack of office market strength.

Project Name	Sq. Ft.	Year Built	Development Type	Lot Acres	Floor Area Ratio
Olympia & Lilly Storage	127,000	2019	Self Storage	2.16	1.35
Hampton Inn, Olympia	85,500 (121 rooms)	2016	Hotel	4.26	0.46
Kingham St Pad Site	3,800	2016	Retail (multi-tenant)	0.82	0.11
BioLife Plasma Svcs	16,700	2016	Office	1.43	0.27
Lacey Self Storage	12,000	2019	Self Storage	3.76	0.07



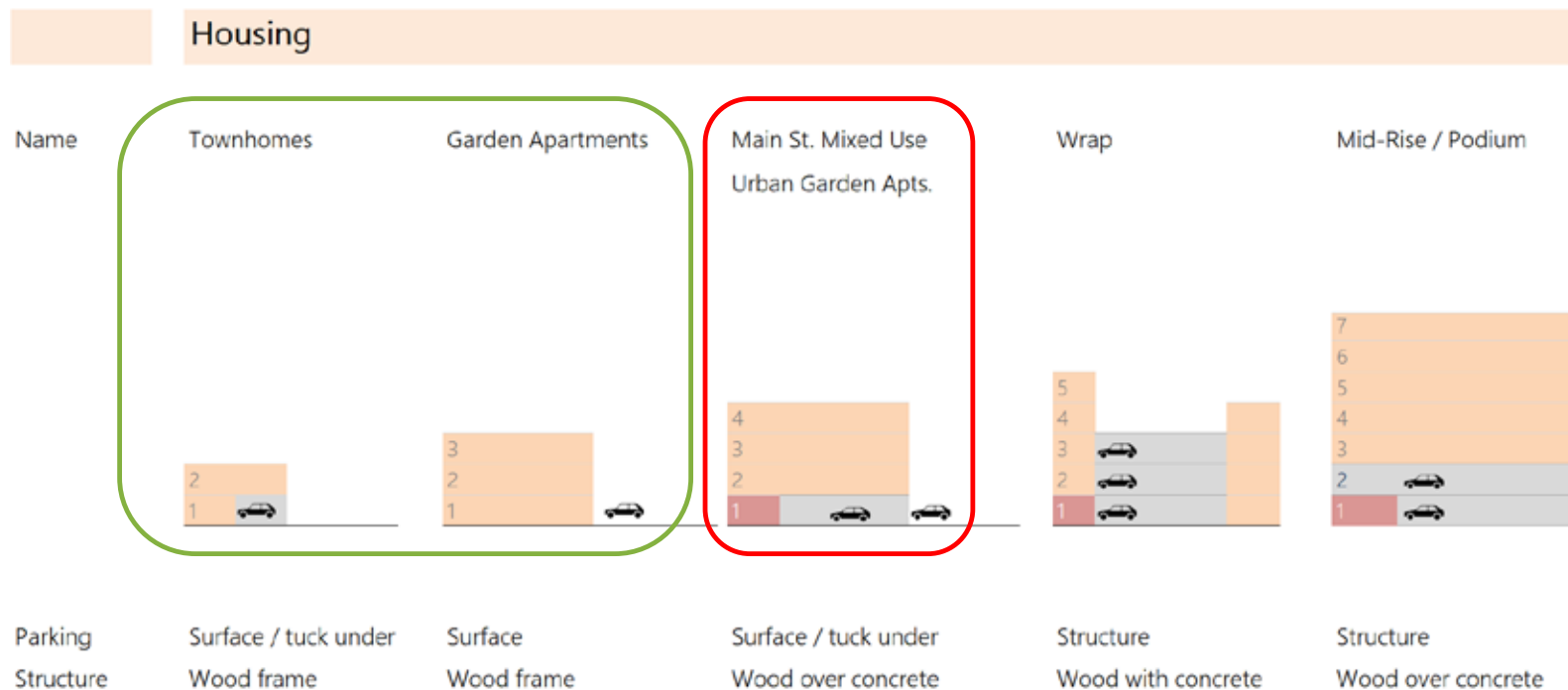
Source: Costar

Land Uses & Development Character

Housing Prototypes

Much development is built within a series of “prototypes.” The way in which parking is provided (surface, tuck under, or structured) is a key influence on the physical form of these projects. Typical housing (multifamily) prototypes are shown below.

Development in the Martin Way Corridor has been consistent with Townhomes and Garden Apartments. Interviews with area developers indicate market momentum towards a Main Street Mixed Use development type, but only with public funding assistance or incentives.



Development Feasibility

The vision for a mixed-use, higher-density development pattern is not yet feasible on the MWC, predominantly because construction costs have outpaced rent growth.

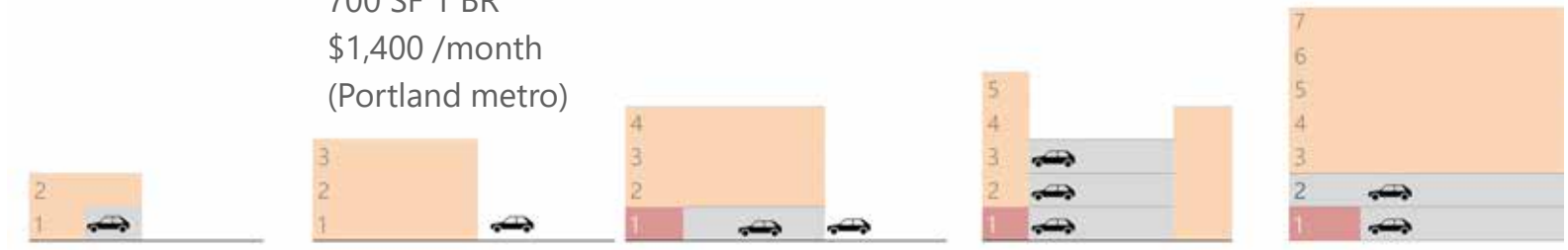
The specific feasibility gap will be explored in LCG's feasibility analysis.

Therefore, **rent** must increase to create ROI

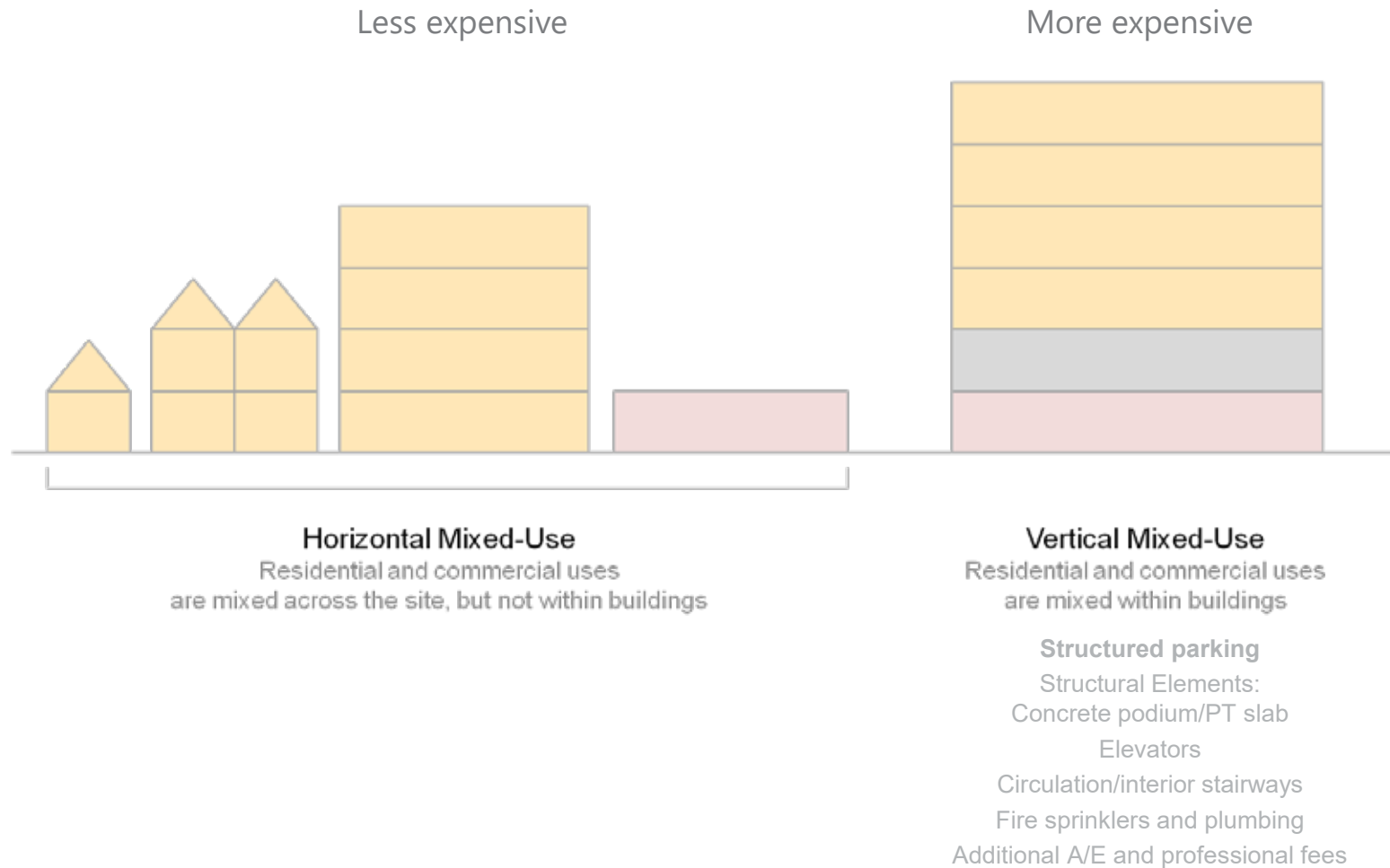
Construction Cost Increases

Required rent:
 ~ \$3.00 PSF
 700 SF 1 BR
 \$2,100/month
 (Portland metro)

Required rent
 ~ \$2.00 PSF
 700 SF 1 BR
 \$1,400 /month
 (Portland metro)

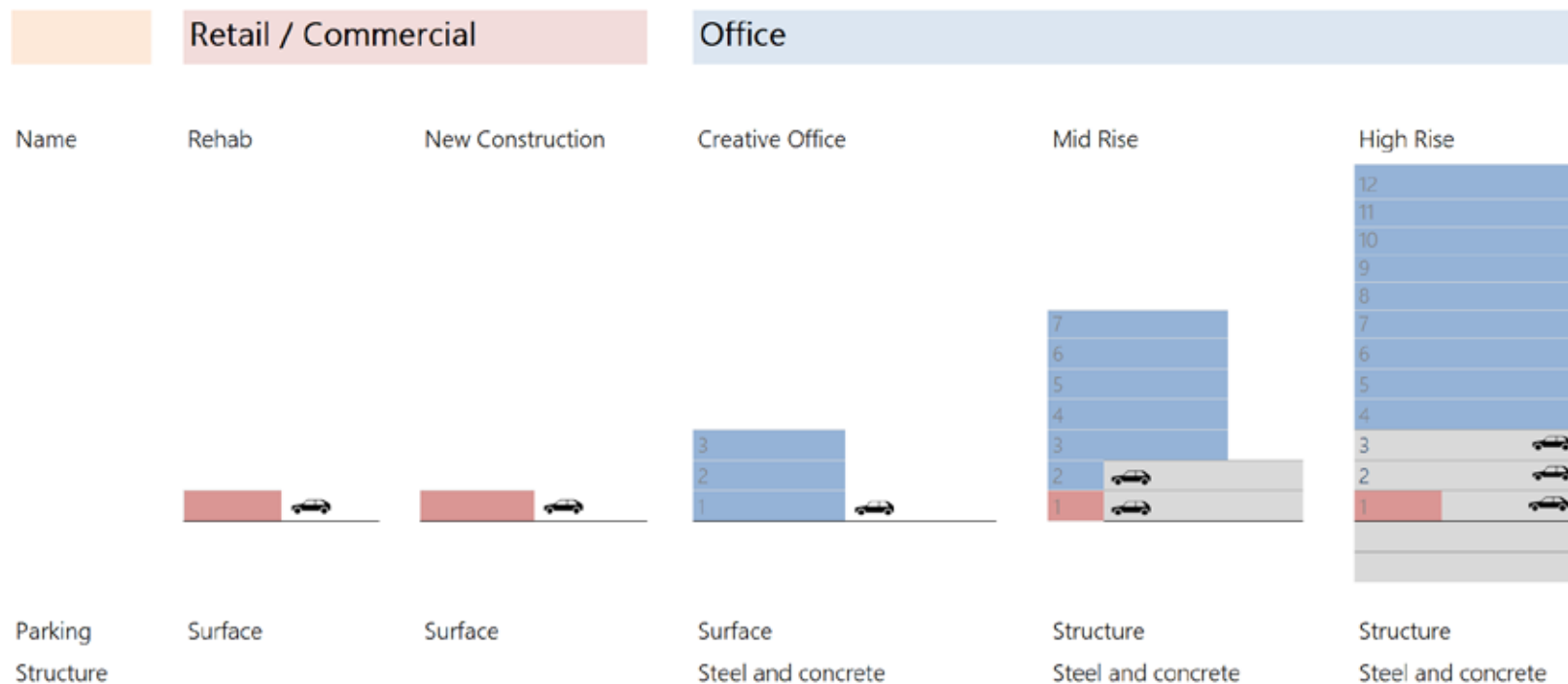


Types of Mixed-Use Development



Commercial Prototypes

Typical retail and office prototypes are shown below. Like the housing prototypes, the way in which parking is provided (surface, tuck under, or structured) is a key influence on the physical form of these projects. For single-use retail projects, there may be new construction or rehab/renovation of existing retail/commercial buildings, since there are many of these buildings in the MWC and rehab is a likely type of development.



Opportunity Sites

Development Opportunity Sites



In LCG’s experience, cities are best served by selecting specific areas to focus investments. Areas that are likely to transition the most in keeping with the vision for the corridor include nodal areas (i.e., where major roads intersect) that contain one or more major development opportunities.

Leland Consulting Group identified six nodal areas of activity along the Martin Way Corridor.

The criteria for development opportunities sites include:

- Vacant or highly underutilized sites
- Larger than two acres
- Contiguous ownership
- Known investment properties

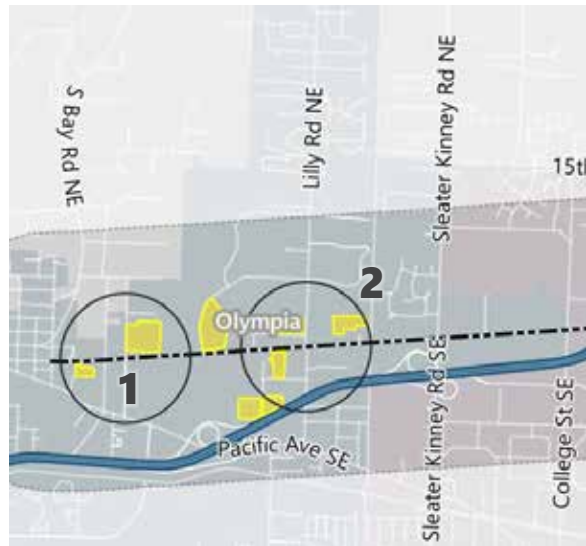
In Olympia, the combination of recent and planned private investments—particularly in housing and healthcare—and the need for improvements to the right-of-way, make Lilly Road a suitable candidate.

In Lacey, Martin Village is the major redevelopment opportunity, although it is unlikely to see the necessary private investment for full-scale redevelopment. More on this in the following pages.

In the unincorporated area of Tanglewild-Thompson place, Carpenter Road presents an opportunity for major redevelopment projects, especially if annexed into Lacey.

In the eastern section, recent development and upcoming projects have accounted for most of the vacant sites, although a few vacant sites remain unaccounted for.

Sites: Olympia



While wetlands and natural areas are prevalent in this section and hinder development prospects the nodal area surrounding the intersection of Lilly Road and Martin Way has the highest density of both construction activity and development opportunities.

Several development projects are in the pipeline on existing vacant sites (not shown in the map at left). These include:

- An affordable 82-unit apartment project called Merritt Manor recently opened on the old Bailey Inn site just west of Stoll Road. A second phase of the project is understood to be market-rate, six stories tall, and contain structured parking. While it would be the first of its type along the corridor, the project is currently only conceptual and at least two years away from breaking ground. Its completion and success will provide a realistic depiction of market feasibility for similar developments in the future.
- Immediately south of Merritt Manor is another proposed market-rate apartment project called The Mulberry. Another 50+ unit market-rate apartment project is proposed in an undisclosed location.

Thurston County parcel data shows land holdings by several potential developers and indicates that private sector investments in the corridor are likely to continue increasing in keeping with the trends of recent years (as long as development is feasible).

The area between Nodes 1 and 2 is owned by Providence, who indicated a desire for development that would be in keeping with “Health Care 2.0.” In LCG’s opinion, this may include a mix of uses that provide housing or retail amenities for staff and customers.

Sites: Lacey (West)

Martin Village is a 33-acres in the central part of the corridor (#3). It is adjacent to 10-acre park and ride and includes a Regal Cinema, a former Sears (currently vacant), retail pad sites along Martin Way, and a Burlington clothing store.

Visibility from I-5 is low and its isolation relative to other uses in the corridor make it a challenging site for brokers to re-tenant. As a weak performing center, the site may be a candidate for reuse or redevelopment. While mall redevelopments can often take advantage of consolidated landownership patterns and a sophisticated set of financing and regulatory tools, Martin Village has at least eight different property owners and CC&R restrictions are likely in place that limit redevelopment. Prospects are therefore likely very long term and require public acquisition and/or funding assistance.



While not fronting on, or within 0.25 miles of Martin Way, the 50+ acre gravel pit presents a significant opportunity for a major redevelopment project in the future. Many examples of gravel pit redevelopments have occurred throughout the state, and most include a mix of uses, including residential, retail, office, and recreation.

The Carpenter Road Node offers more readily developable opportunities (#4). Land is zoned CBD and supports higher density uses. At the southwest corner of Martin Way and Carpenter is a 3.1-acre site within the City of Lacey; other sites are on unincorporated land. A 2.5-acre parcel owned by Thurston County offers up the potential for a joint venture or disposition strategy.

While not fronting on, or within 0.25 miles of Martin Way, the 50+ acre gravel pit presents a significant opportunity for a major redevelopment project in the future. Many examples of gravel pit redevelopments have occurred throughout the state, and most include a mix of uses, including residential, retail, office, and recreation.

Sites: Lacey (East)

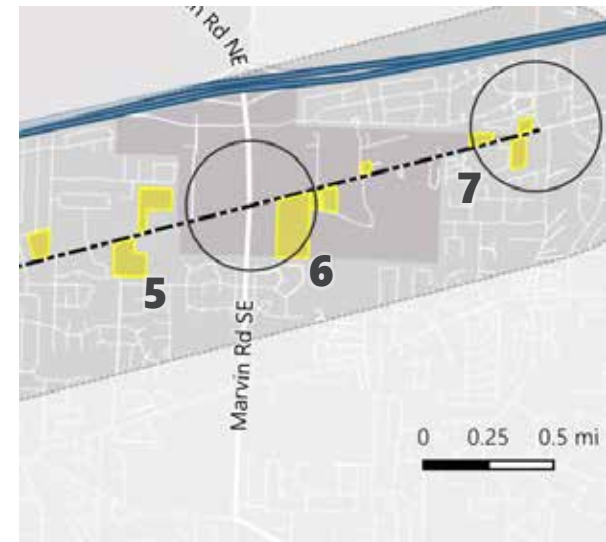
The eastern section of the corridor is dominated by shopping centers north of Martin Way along Marvin Road. While this area might appear like a prime infill opportunity because of the low-density environment and surface parking lots, the covenants, conditions, and restrictions (CC&Rs) that are implemented by retail property owners highly restrict development prospects. These centers are currently strong performers.

South of Martin Way and sharing a property line with the newly constructed Marq Apartments, there is a vacant 20-acre parcel (#6) owned by the Washington Department of Natural Resources. While plans for this site are unknown, if any, it is one of the few large vacant sites in this section of the corridor. Recent multifamily construction, proximity to the future Bus Rapid Transit route and nearby retail services, and access to several major employment growth areas, make this site highly attractive as a housing or mixed-use development. There are also two adjacent smaller (1-2 acre) sites fronting Martin Way.

On a related note, the future terminus of the Bus Rapid Transit route improves prospects for higher density development. However, in LCG's experience, transit is not a major driver of redevelopment; rather it is added value.

There are two "flag" lots in unincorporated Tanglewilde (#5). These sites are considered long-term redevelopment prospects given the industrial character of the surrounding area.

At the study area's eastern terminus (Meridian Rd, #7), there are three developable sites that surround the recently constructed Copper Wood Apartments. Housing and neighborhood-scale retail are appropriate in these locations.



Conclusions

Conclusions

Key Takeaways

Nodal Development. There is not currently a central focus of investment in the corridor. Select locations are on the cusp of transitioning into a moderate density environment. Focusing attention to specific nodes with major development opportunities can give rise to a suburban town center typology—a mixed-use hub that offers entertainment, apartments, and offices.

Development Timing. Market conditions along the Martin Way Corridor still only support surface parked development typologies. The corridor is in transition, however, and may begin to see higher-density developments with a mix of structured and surface parking. From an investment perspective, opportunities include low interest rates, land availability, and rising rents. However, construction costs are expected to continue increasing at the current record pace, so it may take many years before this actually comes to fruition.

Housing. Demand is expected to remain strong for residential uses, particularly apartments. Pent-up demand, among other factors, has driven rents to levels that we believe are on the cusp of supporting higher density development types. The Martin Way Corridor is now a proven market for wood framed, walkup apartments but remains unproven for higher density or mixed-use developments with more experience construction types and structured parking.

Retail. While the Martin Way Corridor is saturated with retail space, particularly general merchandise and big box retailers, opportunities exist to promote smaller, independent retailers and restauraners that provide amenities and services to local workers and residents. Focused investments to the Martin Way streetscape and specific nodes may result in aesthetically pleasing public space and land uses that attracts new tenants.

Office. Office prospects are likely limited for the foreseeable future. Employment growth is expected to continue in the industries of government, healthcare, and warehousing and transportation. Government and healthcare-related office will likely be limited to Olympia in select locations. Professional and financial office may occur as part of mixed-use developments further to the east in the future.

Industrial. The vision for the Martin Way Corridor does not align with the current opportunities and trends in industrial development (big box warehousing and distribution). However, incremental improvements—particularly in the Tanglewild-Thompson area—to existing light industrial properties will likely have modest impacts on market conditions throughout the corridor.

Conclusions

Strategies and Tools

There are several strategies and tools available to cities to improve market conditions and support development that is in keeping with the vision for the corridor. Some tools are in place already and may be expanded, and others are yet to be implemented. This page provides a brief summary of the tools and strategies we will further explore in later tasks of this project.

Tax Credits provide a develop an incentives to construct specific housing types in targeted areas.

- The Low Income Housing Tax Credit program (LIHTC) provides a tax incentive to construct or rehabilitate affordable rental housing for low-income households.
- The Multifamily Tax Exemption (MFTE) currently exists in the western Olympia section of Martin Way and provides an eight to 12-year tax exemption on the building value of eligible housing projects. The program currently stops at Lilly Road.

Bonuses and Waivers. Cities can decide to waive certain fees for certain development types or award bonuses (density, parking) for including certain components.

Public-Private Partnerships (PPPs). PPPs do not have to be big joint ventures; cities can also agree to fund or construct infrastructure improvements that may be prohibitively expensive for developers. Partnerships with local colleges and healthcare institutions may provide additional opportunities.

District-wide funding tools. Tax Increment Financing is currently being debated by the State Legislature.

Placemaking. Public space, plazas, trails, and sidewalks are critical public investments for mixed-use environments. Local governments may need to construct the sidewalks and bike lanes through the critical areas rather than expecting development to build that infrastructure (since there won't be development in those areas).

Phasing. Developing large sites can often be done in a way that limits the need to take significant financial risks upfront. Infrastructure should be built incrementally and flexibly, using a variety of funding sources and financing tools.

Property Acquisitions and Land Banking. As land prices increase, rent growth may not be enough to cover the feasibility gap of higher density development types. Land banking (purchasing and holding land in order to preserve land for desired development types that might not yet be feasible) is one strategy to consider.

Housing Action Plans. Both Olympia and Lacey are in the process of looking into potential future actions or have already adopted a variety of strategies to encourage a range of housing options.

- Olympia has identified land write-downs (discounted land prices for city-owned property), density and height bonuses, streamlining the permitting process, revising development standards, lowering impact fees, and reducing minimum lot sizes
- Lacey's HAP recommendations are borne out of its affordable housing strategy to streamline affordable housing development.

Identify Private and Nonprofit Champions. Often these entities and individuals are able or willing to take more risks for a lower return on investment and can therefore enter the market with lesser needs.



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