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CHAPTER IV - MARKET CONDITIONS

Consistent with national trends, the origins and destinations of commuting trips in the Puget Sound Region have become increasingly suburban, generating what Alan Pisarski of the Eno Foundation for Transportation calls "the suburban commuting boom."⁵ As reflected in the following quotations, the "traditional commute" - the Bellevue resident commuting to downtown Seattle - is now one of many travel markets; including Bellevue residents commuting to Bellevue and other eastside jurisdictions as well as the Seattle resident commuting to downtown Bellevue.

- The PSRC, in its *1999 Central Puget Sound Regional Economic Report*, notes that "Between 1995 and 1998, the number of high tech jobs on the Eastside grew from 36,500 to 50,100, an increase of 37 percent. Over half of the region's high tech jobs are located on the Eastside... The Eastside cities of Redmond, Bellevue, Issaquah and Bothell are home to over 51,000 high tech jobs, more than twice the number in Seattle."
- King County Metro, in its *Six Year Transit Development Plan (1996-2001)*, acknowledged that: "Continuing decentralization of population and employment in King County has decreased travel to Seattle in general and downtown Seattle in particular and has resulted in the rapid growth of suburb-to-suburb and intra-community trips."
- WSDOT, in its *Translake Washington Study Technical Report*, notes that "SR-520 has shown a gradual, but steady, increase in volume between 1984 and the present.... Vehicle travel volumes in both directions are generally balanced..."
- WSDOT, in its *I-90 Existing Conditions Report*, notes that "1999 Existing conditions show that I-90 carries approximately 58% of the trips for AM westbound and PM eastbound vehicles." The gap between east and west is anticipated to narrow over time as the Eastside continues to grow and attract more jobs. Certainly future two-way improved transit and GP travel times will make trips to and from the east that much more attractive

King County Metro *Six-Year Transit Development Plan (1995-2001)* recognized this trend and was formulated on a significant reorientation of service to a broader range of travel destinations. While a number of improvements have been made to the existing route network, the latent demand for transit in East King County is significant.

Operating statistics from King County Metro show that transit ridership on the Eastside is increasing rapidly. By way of example, 31% of East County households used transit in 1999 (1994 = 19%) – the most significant growth in Metro's service area. Additionally, King County Metro's *1999 Rider/Nonrider Survey* showed that one-third (32%) of bus riders living

⁵ Alan Pisarski. *Commuting in America: A National Report on Commuting Patterns and Trends*. Eno Foundation for Transportation. 1987.

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in East King County rely on King County Metro for all or most of their transportation needs.

There are a number of promising trends that suggest the continued improvement of transit as a viable mobility option for Bellevue residents – higher land use densities in the suburbs, more funding for transit service, more infrastructure improvements supportive of transit, and a public committed to alternative modes of travel.

As reflected in Figures IV-1 and IV-2, residential and employment development in the City of Bellevue is occurring at a rapid pace. As evidenced in the following summary, based on Puget Sound Regional Council 2010 growth estimates, residential development in Bellevue is strong throughout the city:

Southeast Area

- Southeast area of Bellevue has higher densities than other areas and a 1998 population of about 4,000. Projections indicate a 50% growth by 2010.
- Transit service only covers north edge of area.

Northeast Area

- Includes portions of Redmond
- Denser development with about 9,200 population; 11,700 by 2010
- Area served by one route
- Near new transit center/park-and-ride lot at SR 520/NE 40th Street

Central Bellevue (140th Avenue Corridor)

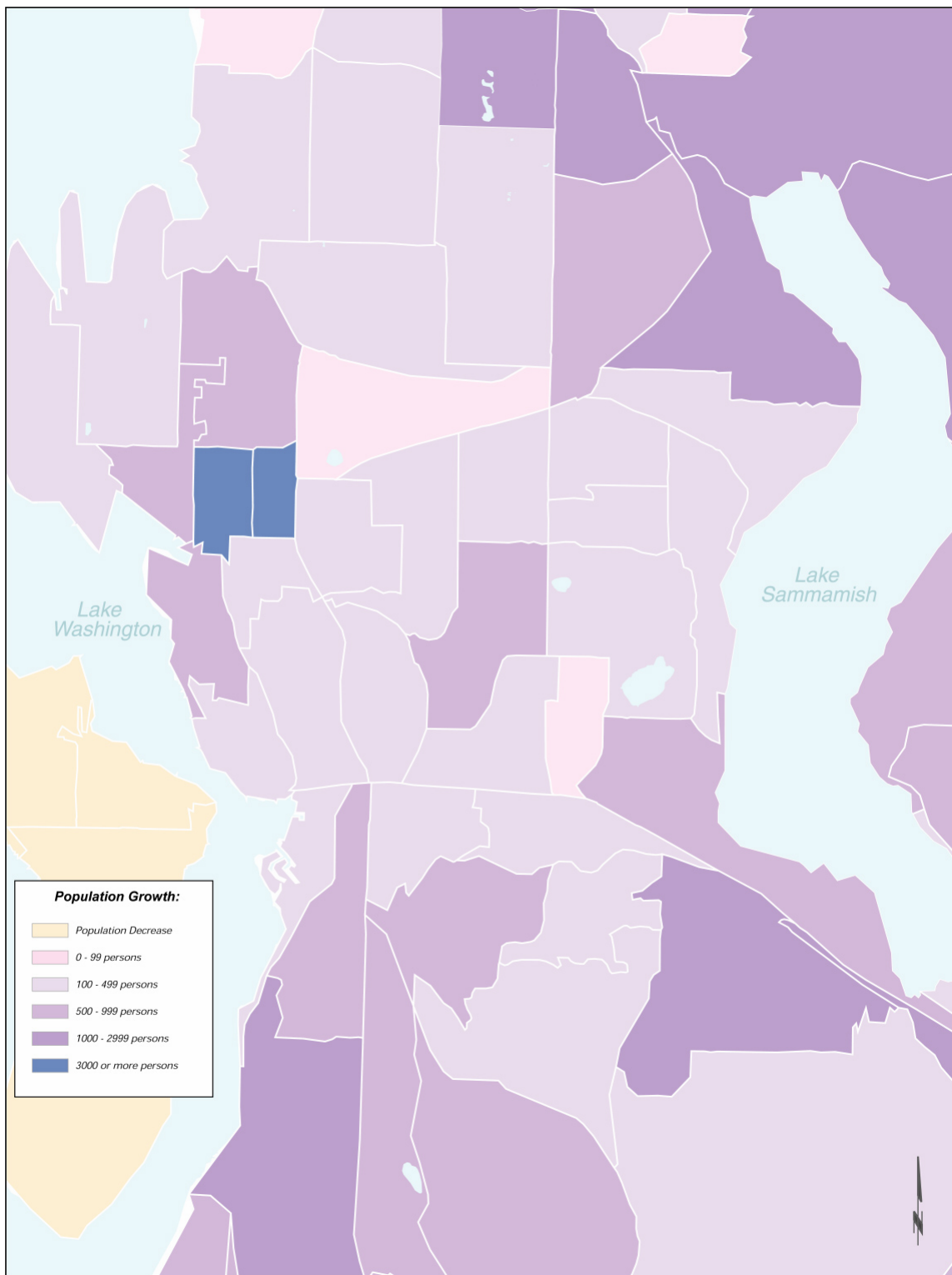
- Significant current population along corridor – Lake Hills to Kirkland (23,000)
- Projected modest increase in population by 2010
- Served by Route Metro 920 – hourly service with van-type vehicle; no evening or weekend coverage.

Similarly, employment development in Bellevue is occurring at an accelerated pace in the following areas:

North of SR 520

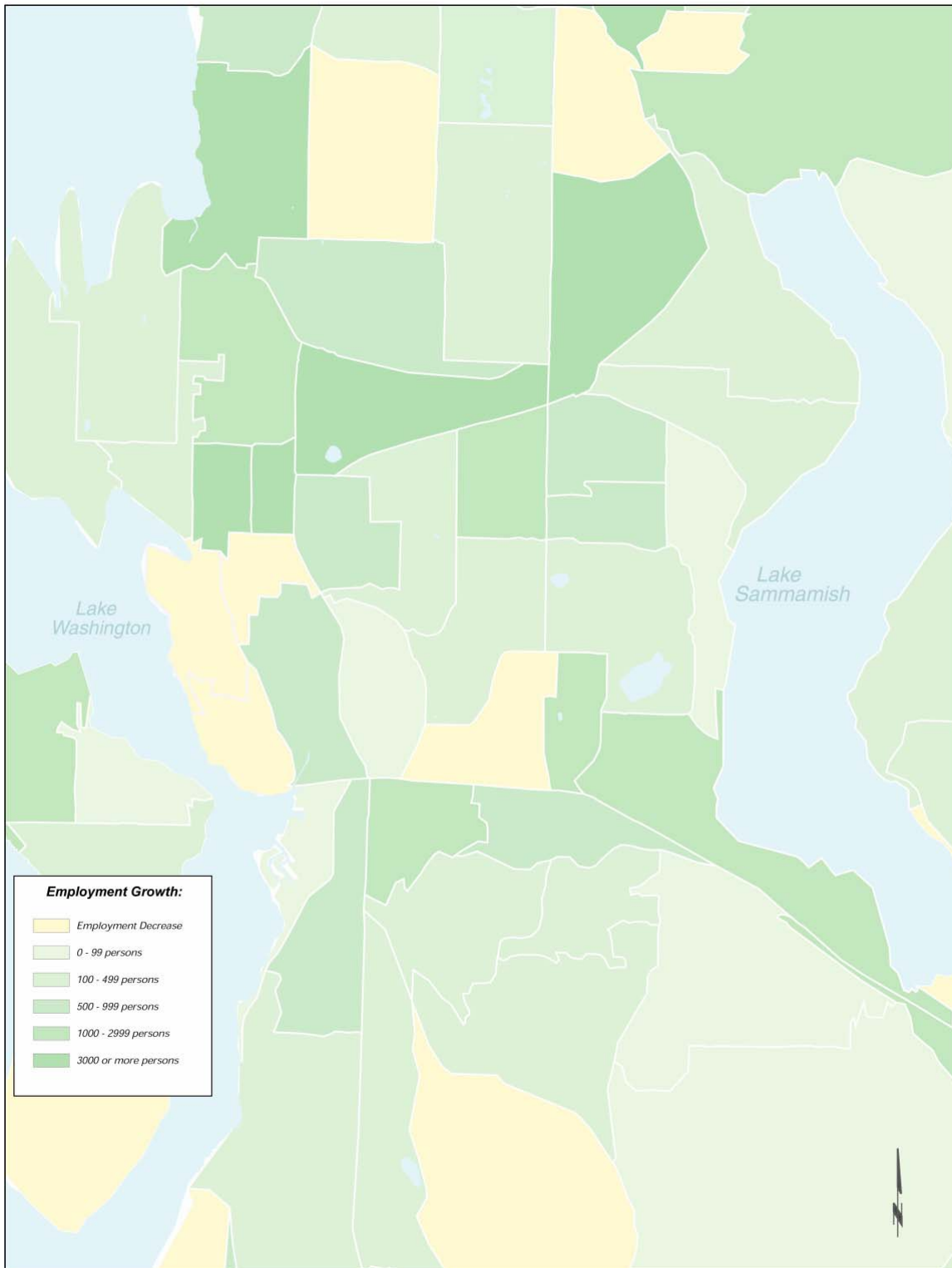
- Already dense employment area. Doubling of employment level by 2010 – 5,300 to 10,600. Served by two Metro routes: 230 via Lake Washington Blv'd (30 minute peak and midday service); 234 via 108th Avenue (30 minute peak; 69 minute midday service)
- Overlake: 20,000 additional employment by 2010. Sound Transit 545/546 provide quick links between Overlake transit center and Seattle
- Several Eastside locations without convenient transit access to Overlake: From Kirkland (Route 230) via downtown Bellevue; From Sammamish (Route 269) – peak only every 60 minutes; North Bellevue – peak only service; and Renton – no service.

Figure IV-1
Forecasted Population Change, 1998-2010



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Figure IV-2
Forecasted Employment Change, 1999-2010



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Travel Demand Analysis

A major factor in assessing possible transit service improvements in Bellevue is the pattern and volumes of total travel demand. It is recognized that future total travel does not necessarily translate into transit travel demand. However, many trips will be candidates for transit. The examination of total travel serves as a starting point for examining what may be potentially feasible transit markets.

This travel demand analysis of 2010 person trips to the City of Bellevue was based on information from the Bellevue-Kirkland-Redmond (BKR) model. A total of 28 districts were identified for the travel demand analysis – 13 in Bellevue; 8 for the eastside, and 7 for the region (non Bellevue and non-eastside areas). The 13 districts in Bellevue correspond to the city's Mobility Management Areas. The Bellevue, Eastside, and Regional areas are aggregations of the traffic analysis zones (TAZ's) that make up the area covered by the BKR model.

Three major markets were addressed by the analysis of travel patterns:

- Bellevue-Bellevue trips,
- Bellevue-Eastside trips, and
- Bellevue-Regional trips.

The review of production (trips originating in a particular area) and attractions (trips attracted to a particular area) indicated that downtown Bellevue and Overlake dominate as major destinations in Bellevue. Figures IV-3 through IV-5 identify dominant travel patterns affecting downtown Bellevue and the Overlake area. The following summarizes key findings of the 2010 person trips demand assessment:

Bellevue – Bellevue Markets (10,000 + Person Trips)

- East Bellevue - Overlake = 18,800
- South Bellevue - downtown Bellevue = 18,400
- Bridle Trails - Overlake = 16,600
- North Bellevue - downtown Bellevue = 15,400
- Bel-Red Northup - downtown Bellevue = 14,800
- Northeast Bellevue - Overlake = 13,600
- Crossroads - Overlake = 13,500
- Bel-Red Northup - Overlake = 13,100

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Bellevue-Eastside Markets (10,000 + Person Trips)

- Redmond non-CBD - Overlake = 65,600
- Kirkland - downtown Bellevue = 43,200
- Kirkland - Overlake = 39,300
- Redmond non-CBD - downtown Bellevue = 15,700
- Renton - downtown Bellevue = 14,800
- Medina, Clyde Hill - downtown Bellevue = 11,700
- Sammamish - Overlake = 11,000

Bellevue-Regional Markets (10,000 + Person Trips)

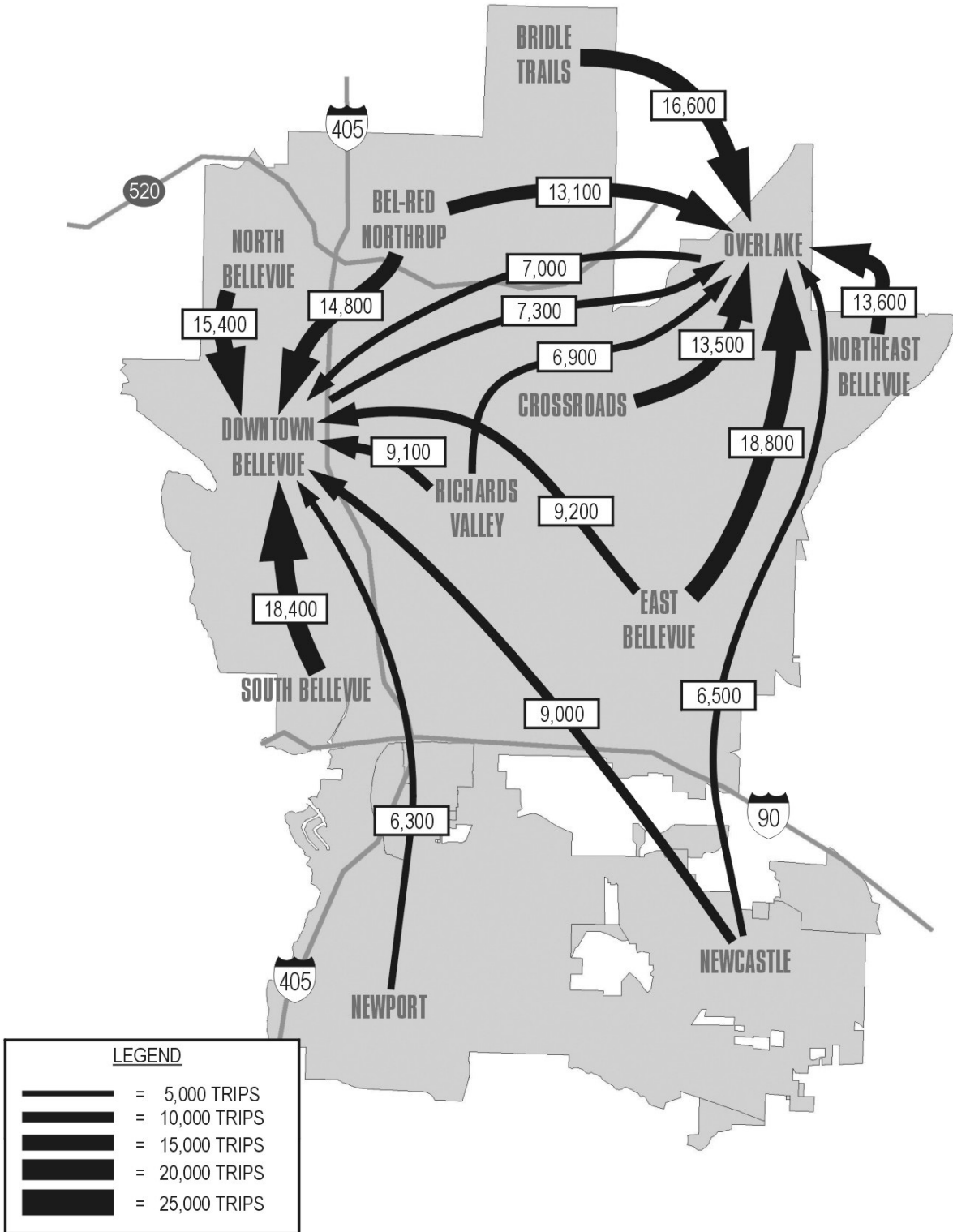
- Pierce County - Overlake = 21,300
- Pierce County - downtown Bellevue = 21,000
- Snohomish County - downtown Bellevue = 16,900
- Snohomish County - Overlake = 15,200
- South King County - downtown Bellevue = 14,900
- Medina, Clyde Hill - downtown Bellevue = 11,700
- North Seattle - downtown Bellevue = 11,500
- South King County - Overlake = 10,500
- South Seattle - downtown Bellevue = 10,300

The travel demand assessment indicates several key conclusions:

- *Bellevue-Bellevue Markets* - The volume of South Bellevue-downtown Bellevue demand indicates the importance of quality transit access between areas such as Factoria and downtown Bellevue. Also good transit connections involving Crossroads-Overlake and East Bellevue-Overlake will be necessary to meet expected trip volumes.
- *Bellevue-Eastside Markets* - For Eastside patterns, the results indicate the need for improved transit access between Kirkland and both downtown Bellevue and Overlake. Also, future transit improvements should address growth in demand between Redmond and downtown Bellevue/Overlake. Transit plans by Kirkland and Redmond have also called out this need.
- *Bellevue-Regional Markets* - Regional travel patterns indicate that future major Bellevue markets involve corridors that are currently not well served by public transit. These include Snohomish-Overlake, South King County-Overlake, South King County-downtown Bellevue, and Pierce County to Overlake and downtown Bellevue.

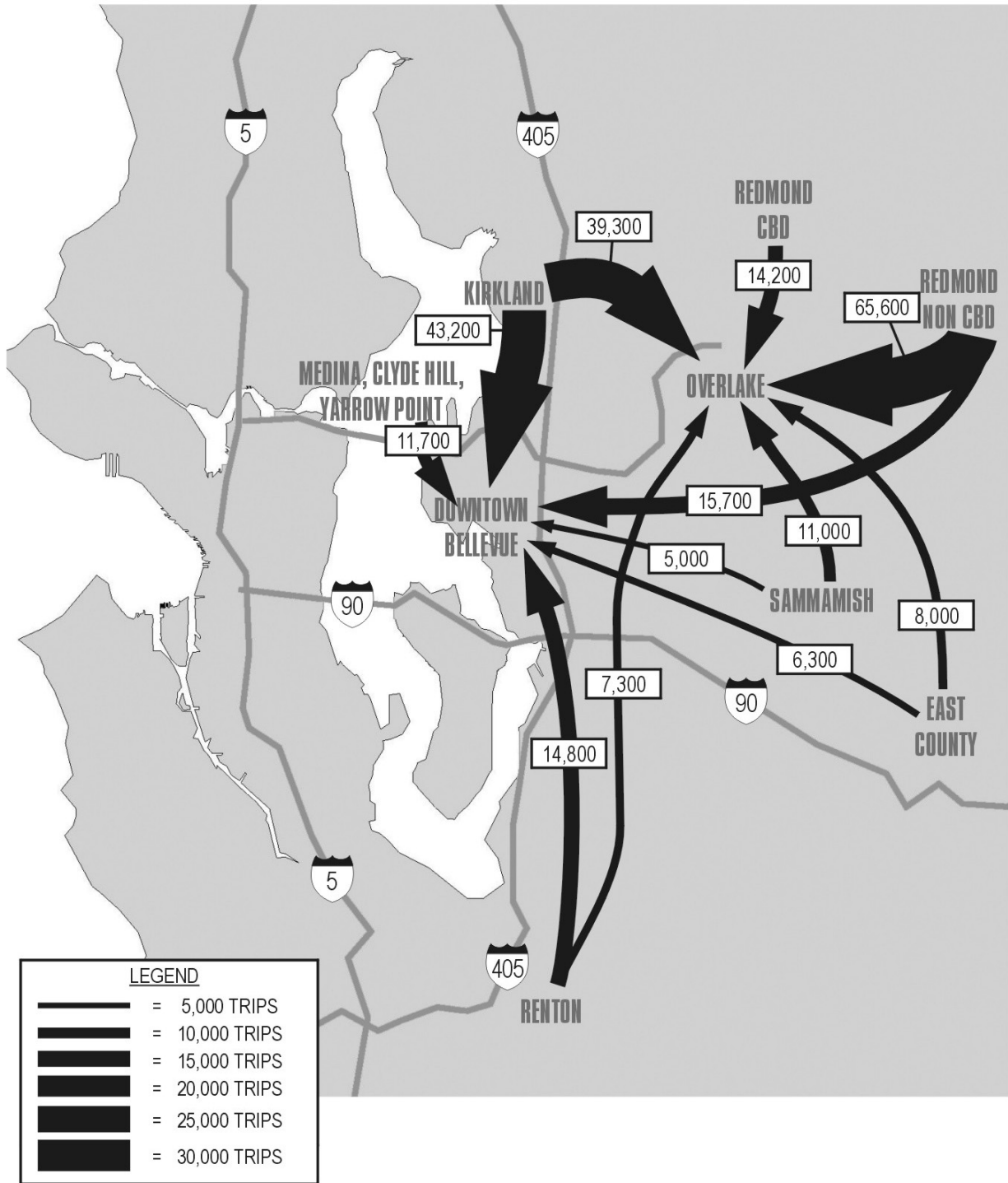
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**Figure IV-3
2010 Total Bellevue Trips to Downtown Bellevue and Overlake**



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**Figure IV-4
2010 Total Eastside Trips to Downtown Bellevue and Overlake**



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Figure IV-5
2010 Total Regional Trips to Downtown Bellevue and Overlake
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