

2026

# U DISTRICT ECONOMIC REPORT



THE **U** DISTRICT  
PARTNERSHIP

# IN THIS REPORT



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## Acknowledgments

2026 U District Economic Report was produced by The U District Partnership and written by Hannah Kiburz, Economic Development Manager, with support from Don Blakeney, Executive Director and Pollyanna Yokokawa, Marketing & Communications Manager.

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## Unprecedented Investment is Shaping the Future of the U District

The U District is where many chapters in Seattle's story began, as home to the city's first art museum, first espresso bar, and first brewpub. It's a neighborhood built on creativity, entrepreneurship, and culture. Today, it's also where Seattle's future is being written.

As a global hub for learning and innovation, the U District brings together world-renowned experts, students, and researchers from across the globe. It's a diverse, dynamic neighborhood with a deep sense of community. The unmatched mix of restaurants, arts, entertainment, retail, and everyday amenities make it a great place to live and connect.

Designated as a regional center in Seattle's Comprehensive Plan, the U District is poised for transformative growth. Major public investments and unprecedented private development are expanding housing, transit, public spaces, and job opportunities—strengthening the neighborhood's role as one of Seattle's most important economic engines.

In the pages ahead, you'll see the U District is a neighborhood in motion—a thriving economy, major investments, and the momentum building toward our next chapter.

We invite you to join us in shaping what comes next.

### **Don Blakeney**

Executive Director  
The U District Partnership



Seattle's neighborhoods are part of our city's character, and the U District stands out as a beacon of creativity and opportunity. A regional transit hub that is home to more than 560 small businesses, a diverse mix of amenities, and growing residential density, it's one of Seattle's fastest growing and most dynamic areas.

At its center is the University of Washington, a global leader whose influence extends far beyond campus, fueling research, arts and culture, entrepreneurship, and economic growth. This report highlights exactly what makes the U District what it is: its unique mix of people, a strong commercial corridor in "the Ave," a hub for innovation, and vibrant pedestrian activity.

The neighborhood plays an important role in Seattle's economy and culture, and I'm excited about the partnerships that make progress possible.

I'm so pleased to support the talent, creativity, and spirit of the U District as we work together to build a future that is economically strong, inclusive, and uplifting for all.

### **Katie Wilson**

Mayor of Seattle





*Welcome to Seattle's*

# NEXT CHA

Long recognized as a cornerstone of North Seattle, the University District ranks among the city's most densely populated and economically dynamic neighborhoods. In 2026, spurred by recent zoning changes and an influx of public and private investment, the U District is experiencing unprecedented residential and economic growth, heavy visitor activity, and continued expansion as a regional hub for innovation and commerce.

Home to over 38,000 residents and Seattle's densest census tract, the U District has seen its population surge 47% since 2010.<sup>1</sup> Its streets are alive year-round, drawing more than 37 million annual visits from people enjoying the small businesses and cultural institutions that make the neighborhood uniquely and authentically Seattle.<sup>2</sup> With more than 560 businesses, including 17 new ground floor tenants arriving in 2025, the mix of long-standing shops and new ventures highlights the neighborhood's robust small business community and entrepreneurial spirit.<sup>3</sup>

That character endures even as the U District undergoes a physical transformation. Since the 2017 upzone, housing development has accelerated, bringing the total number of residential units to more than 16,300, a 27% increase between 2020 and 2025, with additional high-rise projects in the



# CHAPTER

development pipeline.<sup>1</sup> Even as these changes reshape the neighborhood's skyline, the U District continues to retain its authentic character.

The U District's vibrant streets are supported by one of the city's most accessible transportation networks. Among Seattle's top neighborhoods for walk, transit, and bike scores—93, 82, and 87 respectively—the area makes it easy for residents, workers, and visitors to get around.<sup>4</sup> Anchored by one of the system's busiest light rail stations and strengthened by projects like the RapidRide J Line, the neighborhood has become a true multimodal transit hub, connecting people efficiently to destinations throughout the city.

At the heart of the U District's vitality is the University of Washington (UW), one of the state's largest employers and an economic engine that generated over \$20.9 billion in statewide economic impact in fiscal year 2023.<sup>5</sup> The campus not only stands as a pillar of the neighborhood but also drives innovation and opportunity around the world.

Together, these forces—rapid residential growth, exceptional transit access, sustained investment, a vibrant commercial core, and the global reach of the UW—define the U District as one of Seattle's most active, connected, and future-ready urban centers. With continued momentum and strategic planning, the neighborhood is poised to continue as a hub of creativity, opportunity, and urban vitality for decades to come.

<sup>1</sup>The Washington State Office of Financial Management Small Area Estimates Program (OFM SAEP), 2025 <sup>2</sup>Placer.ai, 2025 <sup>3</sup>The U District Partnership Business Inventory, 2025 <sup>4</sup>Walk Score, 2025 <sup>5</sup>University of Washington, FY 23





# FOOT TRAFFIC

*Fueled by Culture, Campus & Community*

Welcoming tens of thousands of people each day, the U District's bustling streets offer visitors the chance to discover something new around every corner. While seasonal patterns of foot traffic, including the academic calendar, continue to shape peak activity periods, the neighborhood's rich mix of cultural institutions, major events, and vibrant small businesses invite exploration year-round.

Moreover, the U District attracts a growing number of visitors each year, with annual visits surpassing pre-pandemic 2019 levels every year since 2023. The return of university affiliates to campus in 2021 played a key role in the neighborhood's post-pandemic recovery, setting the U District apart while other urban centers in the region are still gradually catching up.

# MILLIONS OF VISITORS

*Bolster a Healthy Ground Floor Economy*

Foot traffic data helps show how busy the U District is on a day-to-day basis and how that activity adds up over the course of the year. While not a standalone measure of economic health, it provides important context when considered alongside other data. In the U District, steady year-over-year growth in visits points to a neighborhood that is becoming more popular and more active. Seasonal patterns are also evident, shaped in part by the University of Washington’s academic calendar, with predictable peaks and lulls that influence how the neighborhood feels and functions throughout the year.

**37.4M** visits to the U District in 2025

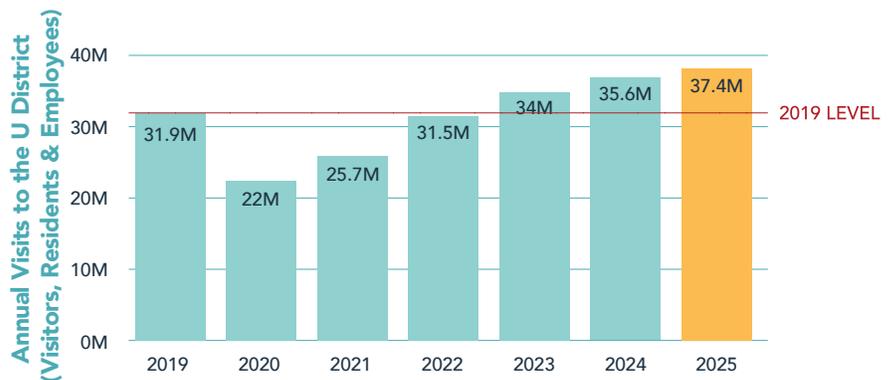
**17.2%** increase in annual visits to the U District, 2019-2025

Source: Placer.ai, 2025

## Annual U District Foot Traffic Surpasses Pre-Pandemic Peak

Annual visits to the U District have grown every year since 2020, surpassing 2019 pre-pandemic levels for the first time in 2023. As of 2025, annual foot traffic in the neighborhood has increased 17.2% compared to 2019.

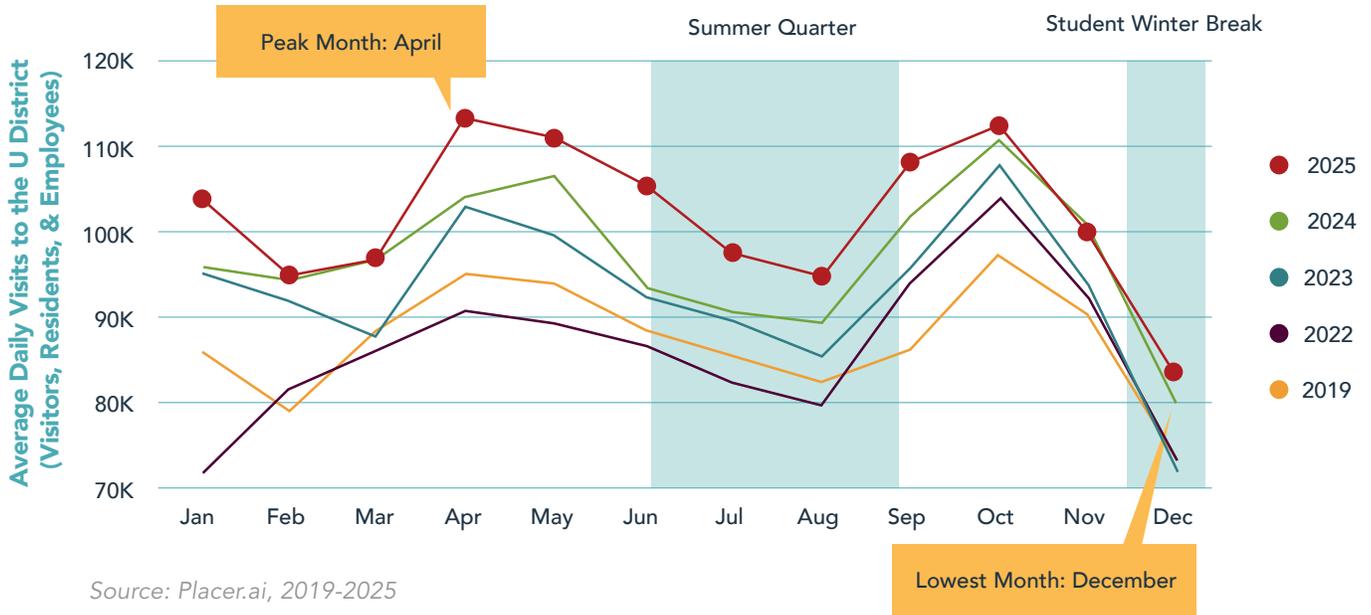
Neighborhood foot traffic has not only recovered from the pandemic, but is now exceeding the 2019 baseline. This strong rebound is sustained by a built-in market of residents, employees, and visitors, particularly those affiliated with the University of Washington, whose return to in-person operations helped drive the rapid recovery.



Source: Placer.ai, 2019-2025

# Seasonal Foot Traffic Shows a Predictable Rhythm and Steady Growth Year-Over-Year

Monthly visitation patterns over the past several years reveal steady year-over-year growth and consistent seasonal rhythms, even when compared with 2019. Seasonal dips during summer and winter breaks are expected in university districts, and winter drop-offs are common across most neighborhoods in Seattle. Students make up a large share of daily visits, but the many non-student residents, employees, and out-of-market visitors keep the U District active year-round.



## 2025 Foot Traffic Highlights

Source: Placer.ai, 2025

Peak Month: April

**113,697**

average daily visits

Lowest Month: December

**83,719**

average daily visits





## Out-of-Market Visits Peak During UW Events and Neighborhood Festivals

Defined as individuals who neither work nor live in the U District, out-of-market visitors help highlight what draws people to the neighborhood for leisure. While residents, students, and employees provide a steady base of daily activity, these visitors reveal the times when the neighborhood's cultural and recreational assets have the greatest pull.

# HIGHEST FOOT TRAFFIC

*periods for out-of-market visits to the U District in 2025*

**UW Move-In**  
September 16 –  
September 27, 2025



**89K**

**Average Daily Visits During UW Move-In Week**  
41.3% above annual average

**Peak Cherry Blossom Bloom**  
March 29 – April 5, 2025



**88K**

**Average Daily Visits During Peak Bloom**  
39.7% above annual average

**UW Graduation**  
June 3 – June 14, 2025



**86K**

**Average Daily Visits During UW Graduation Week**  
36.5% above annual average

**U District Street Fair**  
May 16 – May 18, 2025



**82K**

**Average Daily Visits During Street Fair Weekend**  
30.2% above annual average

*Annual average daily visits to the U District by out-of-market visitors in 2025: 63K*

Source: Placer.ai, 2025

# Cultural Institutions Draw Large Crowds to the U District

The U District has been a cultural hub for the region for over 100 years. From museums and cultural institutions to live performances, athletic events, and signature festivals, thousands of people are drawn to the neighborhood each year for recreation, entertainment, and unique experiences. The strength of the U District’s cultural ecosystem is evident in its wide range of cultural institutions, several of which are listed below along with their annual attendance figures.

*Data provided by each individual venue.*

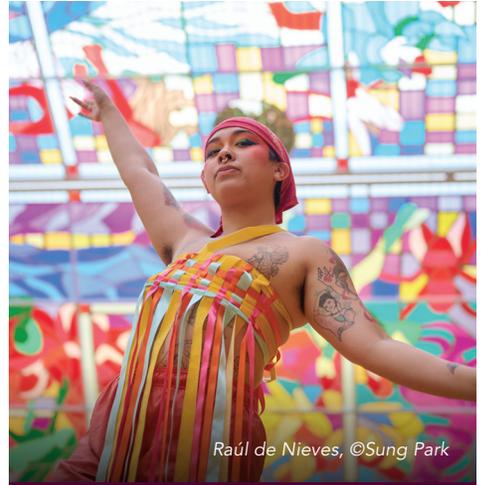


©Christopher Nelson

**Neptune Theatre: 135,379**



**Burke Museum: 84,845**



Raúl de Nieves, ©Sung Park

**Henry Art Gallery: 65,492**



©UW Athletics

**UW Athletics: 666,338**



Alonzo King, ©Jim Coleman

**Meany Center: 56,000**



©Zainab

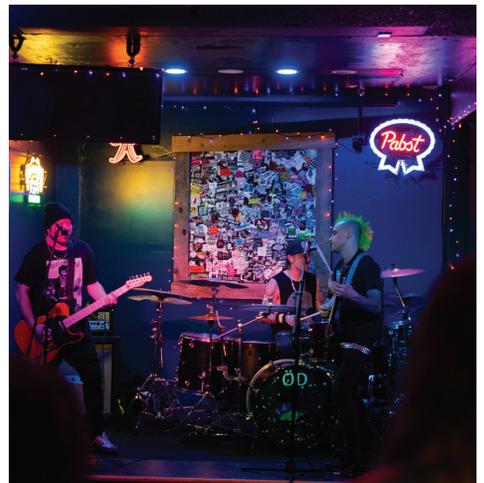
**Laughs Comedy Club: 17,000**



**Blue Moon Bar & Music Venue: ~5,000**



**Unity Museum: 8,000**



**Kraken Bar & Music Venue: 6,240**





# A DIVERSE & GROWING

## *Residential Base*

While thousands of students call the U District home, the neighborhood's walkability, vibrant commercial corridors, and regional transit access also attract many non-student residents. This broader residential base supports the local economy by creating consistent demand for goods and services, keeping the neighborhood active year-round.

# GROWING POPULATION

*Strengthens the U District*

The U District is experiencing sustained residential growth, driving increased demand for housing, services, and neighborhood amenities. In recent years, population growth has accelerated, fueled by students choosing privately developed housing designed to meet their needs, as well as non-student residents drawn to the neighborhood's access and vibrancy.

To accommodate this growth, the U District is building upward and adapting to increased residential density and modern urban living preferences. Today, its residents—students and non-students alike—form a rapidly growing population that is notably young, highly educated, and racially and ethnically diverse.

**38,298**

*U District residents*

**31.3%**

*increase compared to 2015*

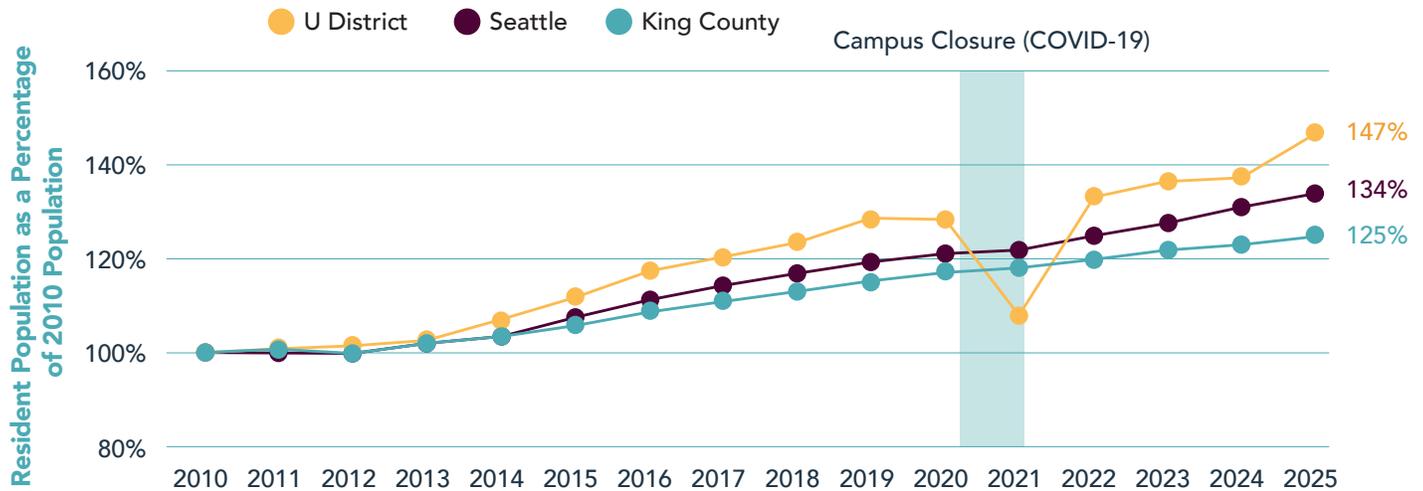


Source: The Washington State OFM SAEP 2025

## U District Population Increase Outpaces Seattle and King County

Over the past 15 years, the U District has become one of Seattle’s fastest-growing neighborhoods. Its residential population has increased by an estimated 47%, far outpacing growth in both the City of Seattle (34%) and King County (25%) over the same period.

This surge is especially notable given that Seattle itself was already among the fastest-growing cities in the country during the 2010s, averaging roughly 2% annual growth. The U District, by comparison, grew at an average of 2.8% per year, underscoring its role as a major driver of citywide population gains and a neighborhood experiencing sustained, long-term demand.



Source: The Washington State OFM SAEP 2025

The chart shows population change in the U District, Seattle, and King County relative to each area’s 2010 population, set at 100%. Values above 100% indicate growth since 2010; for example, 120% represents a population 20% larger than in 2010. The U District’s line rises more steeply than the others, highlighting its comparatively faster growth.



The U District is among Seattle’s most densely populated neighborhoods. According to the US Census, it contains the single most densely populated census tract in the entire city, with a density of more than 121,000 people per square mile. This remarkable concentration of residents underscores the U District’s unique urban character and reinforces its longstanding role as North Seattle’s downtown.

Source: US Census Bureau, ACS 2019-2023

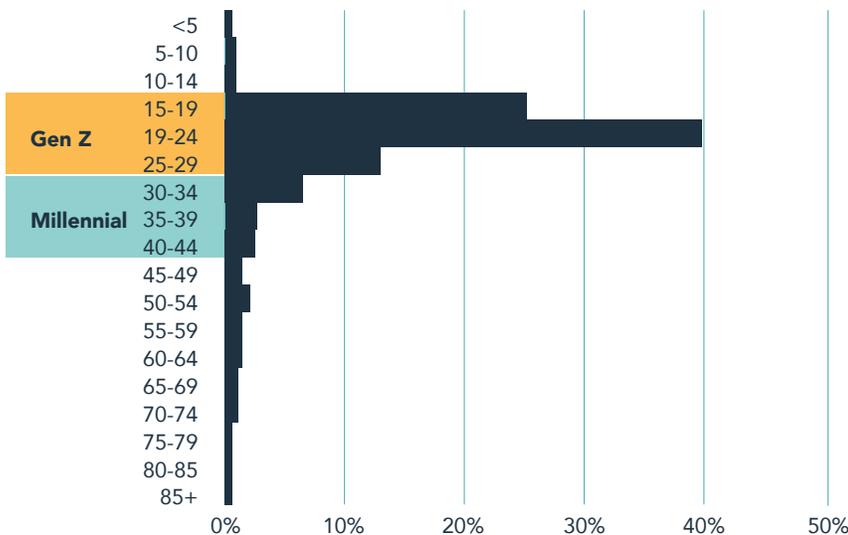
## U District Residents Are Overwhelmingly Young, Diverse, and College Educated

The neighborhood is home to a population that is notably young and highly educated, not only because of the University of Washington’s student population, but also due to the many young professionals and recent graduates who are drawn to the neighborhood’s urban amenities.



### U District Resident Age Distribution

Gen Z residents—who make up over 78% of the U District population and whose pragmatism, emphasis on authenticity, and growing economic influence are increasingly evident nationwide—are well positioned to thrive in a neighborhood that aligns with their values and preferences.

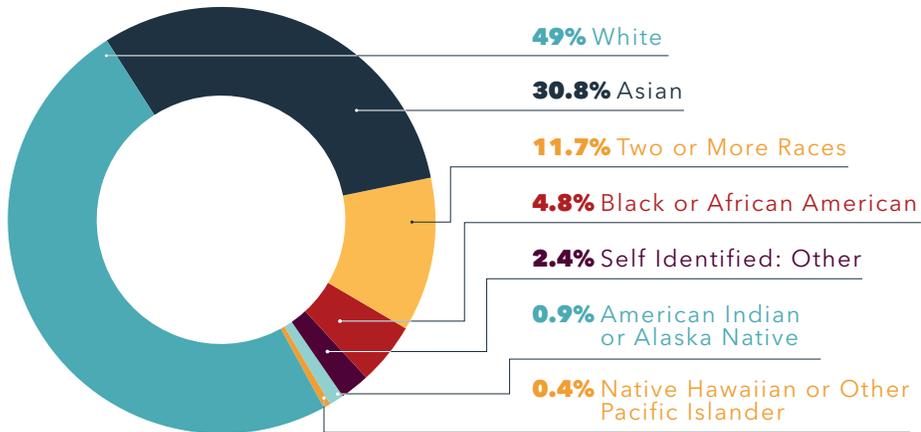


**78%**  
*of U District residents are between the ages of 15 and 29*

Source: US Census Bureau, ACS 2019-2023

## Race & Ethnicity

According to the US Census Bureau's 2019-2023 American Community Survey, U District residents identify their race as follows. In addition, 7.7% of U District residents identify as Hispanic or Latino.



Source: US Census Bureau, ACS 2019-2023

# 35.3%

*of residents speak at least one language other than English*

# 66.3%

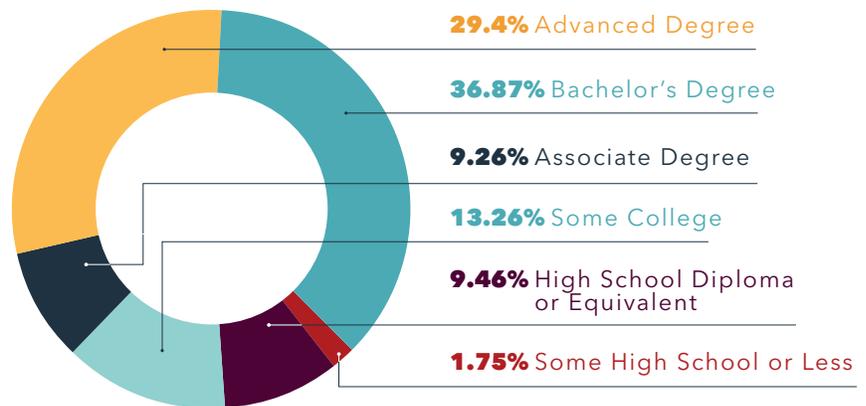
*of residents over the age of 25 hold at least a bachelor's degree*

Source: US Census Bureau, ACS 2019-2023



## Educational Attainment

The U District is a hub of educational attainment, with 66.3% of residents over the age of 25 holding at least a bachelor's degree, and nearly one-third of the population holding an advanced degree.



Source: US Census Bureau, ACS 2019-2023



*130 Years of*

# INNOVATION

*Anchored in the U District*

As home to the University of Washington (UW), the U District provides the foundational setting for one of the region's most powerful economic engines. The University and surrounding area operate in a mutually reinforcing relationship that shapes both daily life and long-term investment. The UW and its affiliates, including students and employees, generate steady demand for local businesses, transit, and services, while also fueling substantial private investment in housing, office, and research space. In return, the neighborhood provides the amenities and urban environment that sustain the University community and support a vibrant, walkable district.

Over time, the relationship between the UW and the U District has allowed both to grow together, addressing shared challenges and fostering innovation both collaboratively and independently. Together, they cement the U District's role as a center of education, research, commerce, and community, extending its impact far beyond its borders.

*A Neighborhood That Fuels Washington's*

# ECONOMIC ENGINE

The University of Washington is one of Washington State's largest employers and among the region's most influential economic institutions. Its teaching, research, medical, and administrative operations generate billions of dollars in annual economic activity, support tens of thousands of jobs, and attract students, faculty, staff, patients, and visitors from around the world.

Home to the University's primary academic, administrative, and UW Medicine campuses, the U District serves as a central hub of the University's economic influence, reinforcing the neighborhood as a place for long-term investment.



**\$20.9B**

*in statewide economic impact generated by the UW annually*

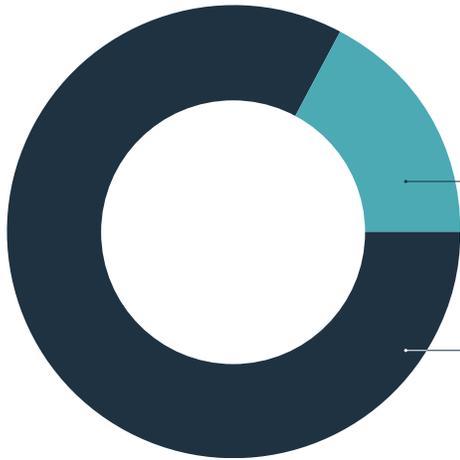
**\$2.5B**

*in annual visitor and student spending across all UW campuses*

Source: The University of Washington, FY23

## One of Washington's Most Influential Employers

Across the state, the UW sustains 111,951 jobs.



**17.4%**  
**19,434 jobs**  
indirectly through student  
and visitor spending

**82.6%**  
**92,517 jobs**  
directly through core operations  
and capital spending

Source: The University of Washington, FY23

The UW is the

**5<sup>th</sup>**  
largest employer in the  
State of Washington

**1 in 10**

workers in the State of  
Washington are UW alumni

Source: The University of  
Washington, FY23



The UW is ranked No. **8**  
for Best Global Universities

Source: 2025-26 U.S. News & World Report

Launchpad for

**NEW IDEAS**

The University of Washington was named the world's most innovative public university by Reuters in 2019. Through **UW CoMotion**, the university supports 110 active companies based on innovations from University of Washington research, employing over 1,549+ people and generating over \$2.3B in the past five years.

**110**

active companies based on  
innovations from the UW

Source: The University of Washington

# STUDENT

*Population on the Rise*

Students are a cornerstone of the U District's identity, shaping the neighborhood as residents, consumers, and young adults navigating a formative stage of life. Each year, tens of thousands of students living both on and off campus move into the U District, establishing routines, finding new favorite places, and contributing to the daily rhythm of the neighborhood.

**52,316**

*UW students enrolled at the Seattle campus*

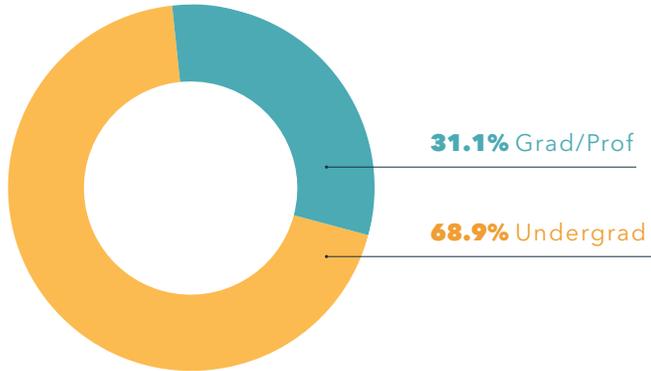
**7,129**

*UW first-year undergraduate students enrolled at the Seattle campus*

*Source: The University of Washington, 2025-26*

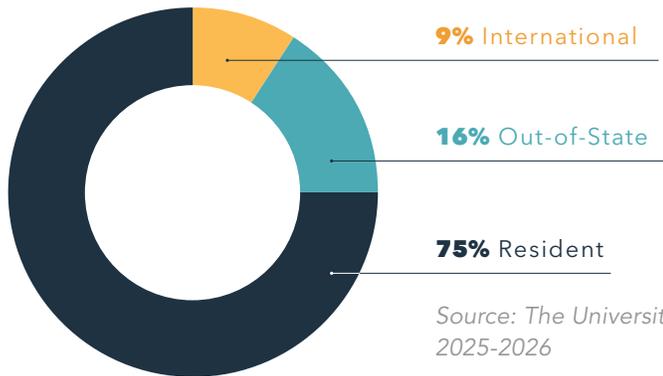


## Students by Degree Level Seattle Campus



## Undergraduate Students by Residential Status All UW Campuses

Most undergraduates across the UW's three campuses are residents of Washington State, but 25% come from out of state, including many international students, bringing a wide range of experiences to the UW community. From a neighborhood perspective, these students' needs can differ. While all require access to basic services, those living far from home often rely on additional support, such as finding a doctor or dentist in Washington State, that local students may already have in place. This creates particularly high demand for these services in the U District.



Source: The University of Washington, 2025-2026

# 9,149

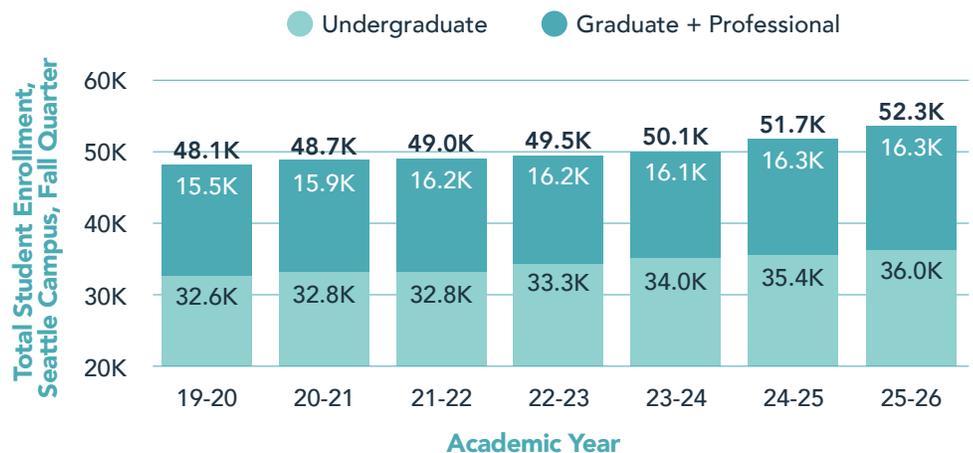
UW students living on the Seattle campus

Source: The University of Washington, 2025-2026



## Student Enrollment at the UW's Seattle Campus Rises 8.7% Since 2019

Undergraduate enrollment at the UW's Seattle campus is at an all-time high of 36K students, increasing 10.4% between the fall quarter of 2019-20 and fall 2025-26. Over the same period, enrollment in Seattle-based professional and graduate degree programs grew by roughly 800 students. This demonstrates that the neighborhood not only sees a consistent flow of students every day, but that this population is growing, creating greater demand for goods and services in the U District.



Source: The University of Washington, 2025-2026

*Education Professionals Serve as the Core of the Neighborhood's*

# WORKFORCE

The U District is home to a diverse range of employers and industries, including thriving life sciences and research sectors, a robust food service industry, and numerous social service organizations. However, with the University of Washington (UW) as the neighborhood's largest employer, the U District workforce is overwhelmingly centered on education, comprising both faculty and university staff. Moreover, the U District hosts the majority of Seattle's educational services positions, making the neighborhood a stronghold for education professionals.

# 32.9K

# of jobs in the U District

# 55%

*of Seattle's Educational Services jobs are located in the U District*

*These roles are defined as instructional and training roles at public and private schools of all levels.*

Source: US Census Bureau OnTheMap, 2023

## Top Industries of Employment



### **Educational Services**

Schools, Colleges, and Other Educational Institutions



### **Accommodation & Food Service**

Hotels, Restaurants, and Cafes



### **Retail Trade**

Stores & Shops



### **Healthcare & Social Assistance**

Hospitals, Clinics, and Social Services



### **Professional, Scientific & Technical Services**

Legal, Consulting, Research, etc.

Source: US Census Bureau OnTheMap, 2023



## Long-Term Employment Data Shows a Pattern of Growth, Despite Fluctuations

Job growth in the U District has remained steady over time. By 2023, the neighborhood supported nearly 33,000 jobs—a 14.4% increase since 2019.

Employment dipped in 2018 and 2019 due to a decline in educational services jobs, likely caused by an administrative change in reporting, as this phenomenon did not reflect broader neighborhood trends or major job losses. By 2022, job totals in the U District had fully rebounded, even amid broader post-pandemic workforce pressures.



Source: US Census Bureau OnTheMap, 2023





*From*

# LEGACY BUSINESSES

*to*

# NEW CONCEPTS

Seattle's U District is home to more than 560 businesses, many of which activate the neighborhood's ground floors and contribute to its lively street environment. As one of the city's oldest commercial districts, the U District has long served as a hub for North Seattle, blending historic buildings and long standing Seattle businesses with new concepts and emerging startups.

The neighborhood functions as both a launchpad for entrepreneurs opening their first storefronts and a point of entry for international brands entering the U.S. market. This ongoing mix of new ventures and established anchors keeps the U District dynamic while preserving its distinct character.

With a high concentration of restaurants, retail, and cultural spaces, the U District offers a diverse range of amenities that support daily life, attract visitors, and reinforce its appeal as a place to live, work, and explore.

# A FULL-SERVICE NEIGHBORHOOD

## Reflected in a Diverse Business Mix

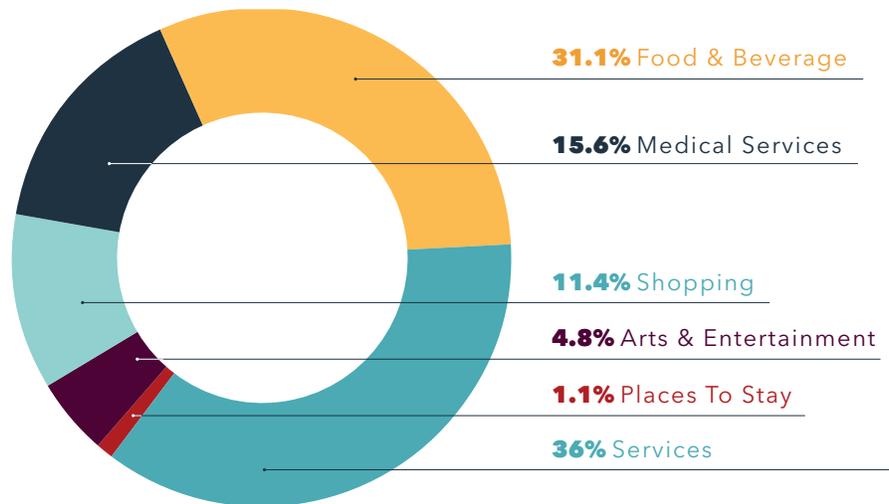
The U District’s business landscape is rich with amenities, ranging from everyday services to a wide array of unique shops, restaurants, and experiences. With multiple grocery stores, medical offices, and other businesses that meet daily needs, the U District functions as a fully self-sufficient neighborhood, with most necessities available within its boundaries.

In recent years, the closure of pharmacies and everyday home goods stores reflects a broader trend seen across many Seattle neighborhoods, resulting in critical service gaps. Nevertheless the U District’s strong and consistent customer base indicates continued demand for these businesses, creating a clear opportunity for providers seeking to address this need.

**560+**  
businesses located  
in the U District

The breakdown of the U District’s businesses by category reveals a balanced mix of industries and offerings, with a notable concentration in services and food and beverage establishments. This chart focuses on consumer-facing businesses occupying neighborhood space and excludes religious institutions and residential leasing/management offices to provide a clearer view of these commercial offerings.

### All U District Businesses by Category



Source: The U District Partnership Business Inventory, 2025

#### The “Services” category encompasses:

- |   |   |
|---|---|
| <b>1.48%</b> Animal Care                      | <b>9.85%</b> Massage & Acupuncture                    |
| <b>4.93%</b> Automotive & Transportation      | <b>6.90%</b> Media & Creatives                        |
| <b>9.36%</b> Business Services & IT           | <b>21.18%</b> Personal Care, Grooming & Spa           |
| <b>2.46%</b> Cleaning & Repairs               | <b>18.23%</b> Professional, Legal, & Banking Services |
| <b>10.84%</b> Community Services & Nonprofits | <b>8.37%</b> Property & Real Estate                   |
| <b>6.40%</b> Education & Tutoring             |   |



**60%**  
of U District  
businesses occupy a  
ground floor space

## Vibrancy Driven by Ground Floor Economy

Ground floor businesses are a defining feature of the U District, with around 60% of all businesses occupying street-level space. These establishments play a highly visible role in shaping the neighborhood’s streetscape and defining the pedestrian experience. While the majority are concentrated along “The Ave”, ground floor businesses are also clustered throughout the neighborhood on corridors like Roosevelt Way NE and 45th St NE, creating an active and diverse urban environment at every turn.

## Seattle Bouldering Project Transforms A Historic U District Corner

In November 2024, the opening of Seattle Bouldering Project’s (SBP) U District location reshaped a pivotal corner of the neighborhood. Located on NE 45th St and University Way NE, the incredible renovation of the historic University National Bank building attracted SBP as they sought to build upon the success of their other gyms and open their fourth location in the Seattle market.

The building served as a bank for its first 106 years, until it was purchased in 2020 by Hunters Capital with a vision to restore and revitalize it for the future, achieving Federal Historic Landmark status the following year. This adaptive reuse project preserved the building’s architectural heritage while reimagining its purpose with 7,000 square feet of bouldering walls, a yoga studio, fitness areas, and unique amenities like cold plunges and an infrared sauna housed inside the original bank vaults.

Bouldering Project chose the U District to expand access within a fitness-forward market, strategically positioned near light rail. This location presents the opportunity to tap into the neighborhood’s diverse, high-energy demographic— specifically the students and young professionals who are the core of the bouldering community.

“The U District was a natural choice for our expansion,” says SBP General Manager Kara Stone. “We saw a chance to serve new members and cultivate future climbers in what is arguably our most visible location, benefiting from high pedestrian and vehicular traffic. Being just a block from the light rail and adjacent to UW allows us to truly welcome people to the sport, connecting with the community and providing that essential ‘third place’ in their lives.”

### BUSINESS FEATURE



©Laura Schneider,  
Seattle Bouldering Project

One of Seattle's Highest Concentrations of

# CAFES, RESTAURANTS, & BARS

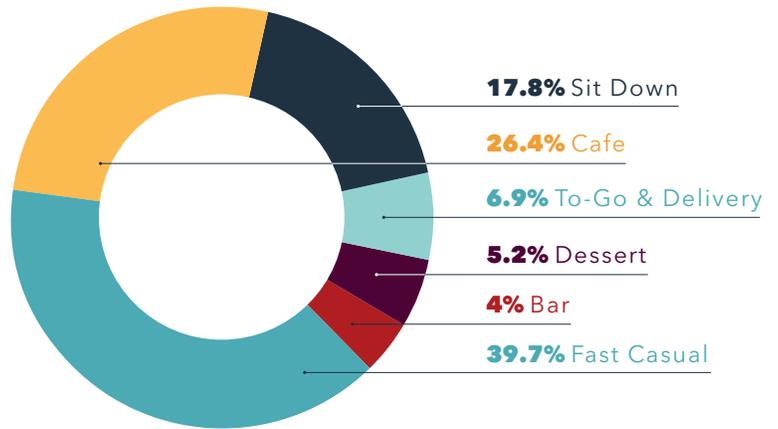
The U District is home to over 170 food and beverage establishments, offering dining experiences in a variety of formats. With more than 20 cultures represented amongst U District restaurants, visitors can explore flavors from around the world, all within a single neighborhood.

**170+**

food and beverage establishments

Source: The U District Partnership

## Food & Beverage Businesses by Venue Type



## An Unparalleled Mix of Authentic Food For People on the Go

The U District's food and beverage scene is defined by variety, offering a wide range of venues to enjoy global cuisines, with a particularly strong showing of Asian restaurants. This diversity extends across formats: fast-casual establishments provide convenient counter service, cafés and dessert shops serve as everyday gathering spaces, and sit-down restaurants enhance the neighborhood's appeal as a dining destination.

## International Cuisine Mix

|                           |                              |
|---------------------------|------------------------------|
| <b>15.2%</b> Chinese      | <b>&lt;2%</b> Greek          |
| <b>9.6%</b> Taiwanese     | <b>&lt;2%</b> Venezuelan     |
| <b>11.2%</b> American     | <b>&lt;1%</b> Brazilian      |
| <b>&lt;2%</b> Hawaiian    | <b>&lt;1%</b> Caribbean      |
| <b>&lt;1%</b> Indigenous  | <b>&lt;1%</b> Cuban          |
| <b>7.2%</b> Asian Fusion  | <b>&lt;1%</b> Eritrean       |
| <b>7.2%</b> Japanese      | <b>&lt;1%</b> Ethiopian      |
| <b>7.2%</b> Korean        | <b>&lt;1%</b> Irish          |
| <b>7.2%</b> Vietnamese    | <b>&lt;1%</b> Italian        |
| <b>6.4%</b> Mediterranean | <b>&lt;1%</b> Latin American |
| <b>6.4%</b> Thai          | <b>&lt;1%</b> Lebanese       |
| <b>5.6%</b> Indian        | <b>&lt;1%</b> Persian        |
| <b>5.6%</b> Mexican       |                              |

This calculation excludes cafes, bars, and certain fast food chains.  
Source: The U District Partnership Business Inventory, 2025

## Dedicated to Ethiopian Coffee Traditions, Avole Opens a Community-Focused Café in the U District

Owners Solomon Dubie and Gavin Amos became business partners in 2018, united by a shared vision to create a welcoming café rooted in authentic Ethiopian coffee culture. After opening their first location in Seattle’s Central District, Avole expanded to the U District in October 2025, taking advantage of a larger space designed for gathering and lingering. The café serves as a third place where neighbors can seek connection or recharge.

“We want people to feel naturally drawn to the space and to build community here,” said Amos. “The U District felt like the right place for that—there’s energy, curiosity, and a strong student presence.”

In this space, Avole highlights the traditions of Ethiopian coffee, from ceremonial preparation to attentive hospitality, showing how coffee can bring people together. This approach complements the U District’s multicultural food scene and its celebration of local entrepreneurship.



# The U District Welcomed **17 NEW** Businesses in 2025, Including Nine Food & Beverage Spots

New businesses continue to open across the U District, reflecting a dynamic commercial environment and ensuring there is always something new to explore.

**Food + Beverage:** Bite and Bento, Avole Coffee, Egg Street, Manager’s Pizza, Muddy Waters Coffee Company, Nom Nom Sando, Daddy Tacos & Cuban, Snooze Café, Taste of Home

**Shopping:** Late Night Vintage Mall, ThreadsOhSix, Flower’s 24 Hour Market, Muse Crush, Nook & Cranny Books, Re-Animated Music, HAVN

**Community Space:** Loft on the Ave

RETRO REVIVAL:

# VINTAGE, THRIFT & NOSTALGIA

*Define Shopping in the U District*

A defining feature of the U District's business landscape is its vibrant cluster of thrift shops, vintage stores, and physical media collections. These establishments cultivate a distinct retro vibe that resonates strongly with today's shoppers, who are rediscovering the charm of records, used books, vintage clothing, video games, and collectibles. By blending long-standing favorites with emerging trends, the U District offers a retail experience centered on unique discoveries and an alternative to conventional shopping. This culture of reuse and curation enriches the neighborhood's commercial identity, reflecting a broader embrace of sustainability, individuality, and creative expression, while celebrating past trends that have found new popularity.





## Thrift & Second Hand Clothing:

### Crossroads Trading

4300 University Way NE

### RAX Vintage

4341 University Way NE

### Red Light Vintage & Costume

4560 University Way NE

### Late Night Vintage Mall

4552 University Way NE

### Lucky Dog on the Ave

4542 University Way NE

### Lucky Vintage

4742 University Way NE

## Physical Media:

### Pink Gorilla Games

4341 University Way NE

### Al's Music & Games

4547 University Way NE

### HIFI LOFI

4544 University Way NE

### Neptune Music Co.

4344 Brooklyn Ave NE

### Cenotaph Records

5232 University Way NE

### The Audio Connection

5621 University Way NE

### Seattle Records

5521 University Way NE

### Scarecrow Video

5030 Roosevelt Way NE

### Collector's Corner NW

5025 25th Ave NE

### Re-Animated Music

1217 NE Ravenna Blvd

## Books:

### Magus Books

1408 NE 42nd St

### The Globe Books

5520 University Way NE

## Furniture & Other Items:

### The Man Who Sold The World

5270 University Way NE

### HAVN

5651 University Way NE

### Oasis Antique Oriental Rugs

5655 University Way NE

### Recycled Cycles

1007 NE Boat St



*The U District Attracts*

# UNPRECEDENTED INVESTMENT



# UNTED MENT

For decades, the U District has been one of Seattle's primary centers of economic activity. The neighborhood is now experiencing a transformative phase of growth and investment, sparked when the City of Seattle raised allowable building heights in the core of the district. This change unlocked the potential for taller developments and triggered a wave of transit-oriented construction that is reshaping the area.

Much of this development has focused on housing, responding to strong demand from new residents and offering a variety of formats, from traditional apartments and condominiums to dorm-style private student housing. Although rising interest rates, higher construction costs, and broader market shifts have affected some timelines, many projects in the pipeline remain viable, signaling continued confidence in the neighborhood's long-term outlook.

This momentum is further reflected in the City's most recent comprehensive plan, which designates the U District as a Regional Growth Center—a hub for people, jobs, and innovation. Recognizing its regional significance, the City is developing a dedicated subarea plan to guide growth, ensuring that one of Seattle's key economic anchors continues to thrive while accommodating rapid change.

# DEVELOPMENT GUIDE

## Featured Completed Projects Since 2017

| No. | Building Name       | Building Address     | Year Completed | Stats  |
|-----|---------------------|----------------------|----------------|--|
| 1   | Trailside II        | 4907 25th Ave NE     | 2025           | 7 Stories, 185 Residential Units, 470 Beds, 4.2K SqFt Ground Floor Retail                    |
| 2   | Gateway Building    | 4320 Brooklyn Ave NE | 2024           | 13 Stories, 262.5K SqFt of Commercial Office, 3.5K SqFt Ground Floor Retail                  |
| 3   | Chapter Building I  | 4530 12th Ave NE     | 2024           | 12 Stories, 240K SqFt Commercial Office, 9K SqFt Ground Floor Retail                         |
| 4   | Chapter Building II | 4519 Brooklyn Ave NE | 2024           | 10 Stories, 150.5K SqFt Life Sciences Space, 3.5K SqFt Ground Floor Retail                   |
| 5   | The Standard        | 4220 12th Ave NE     | 2023           | Two Towers (25 Stories Each), 426 Residential Units, 1,541 Beds, 8K SqFt Ground Floor Retail |
| 6   | Arista              | 4715 25th Ave NE     | 2022           | 7 Stories, 236 Residential Units, 8.9K SqFt Ground Floor Retail                              |
| 7   | HERE Seattle        | 4732 Brooklyn Ave NE | 2022           | 7 Stories, 175 Residential Units, 543 Beds, 34.5K SqFt Ground Floor Retail                   |
| 8   | oLiv Seattle        | 4515 Brooklyn Ave NE | 2022           | 22 Stories, 211 Residential Units, 609 Beds, 1.6K SqFt Ground Floor Retail                   |
| 9   | The Accolade        | 4126 12th Ave NE     | 2022           | 21 Stories, 226 Residential Units, 597 Beds  |
| 10  | Theory U District   | 4759 15th Ave NE     | 2022           | 7 Stories, 171 Residential Units, 438 Beds   |
| 11  | Trailside I         | 4801 24th Ave NE     | 2021           | 7 Stories, 265 Residential Units, 762 Beds, 2.1K SqFt Ground Floor Retail                    |
| 12  | The M               | 4700 Brooklyn Ave NE | 2020           | 24 Stories, 230 Residential Units, 477 Beds, 5.8K SqFt Ground Floor Retail                   |

Sources: Seattle In Progress, CoStar, UW Facilities, and individual building representatives

### Student Housing:

# RESIDENTIAL UNITS V. BEDS

Many new residential buildings in the U District are designed for students, making it important to track both units and bedrooms. In these dorm-style layouts, a single unit may contain several bedrooms, meaning far more people live in each unit than the neighborhood's average household size suggests. Counting beds in these developments provides a clearer picture of actual leasing capacity of a building.

NE 65th St



NE Ravenna Blvd

NE 50th St

NE 50th St

1  
25  
6  
NE

I-5

NE 45th St

7  
10  
12  
3  
4  
8

11th Ave NE

15th Ave NE

20th Ave NE

NE 45th St

NE 40th St

2  
5  
9

University Way NE (The Ave)

15th Ave NE

513

NE Northlake Way

NE Pacific St

NE Pacific St

Portage Bay

520

- Featured Completed Projects Since 2017
- Additional Completed Projects Since 2017
- Projects Under Construction
- Projects Announced

## Additional Completed Projects Since 2017

| <i>Project Name</i>                                | <i>Project Address</i>       | <i>Stats</i>   |
|--|------------------------------|--|
| Graceland Apartments                               | 4751 21st Ave NE             | Completed in 2025, 4 Stories, 54 Residential Units                                   |
| Husky Urban Living                                 | 4729 21st Ave NE             | Completed in 2025, 4 Stories, 5 Residential Units, 40 Beds                           |
| Jean Darsie Place                                  | 5228 15th Ave NE             | Completed in 2023, 6 Stories, 57 Residential Units                                   |
| Greta Apartments                                   | 4746 20th Ave NE             | Completed in 2023, 4 Stories, 33 Residential Units                                   |
| Artisan Studios II                                 | 5014 15th Ave NE             | Completed in 2023, 4 Stories, 30 Residential Units                                   |
| Viola Apartments                                   | 4048 7th Ave NE              | Completed in 2022, 7 Stories, 79 Residential Units                                   |
| Artisan Studios I                                  | 5006 15th Ave NE             | Completed in 2022, 5 Stories, 30 Residential Units                                   |
| UW - Health Sciences Education Building            | 1607 NE Pacific St           | Completed in 2022, 4 Stories, Approx. 100K SqFt                                      |
| Clara Apartments                                   | 4730 19th Ave NE             | Completed in 2022, 4 Stories, 78 Residential Units                                   |
| Montclair Apartments                               | 4727 12th Ave NE             | Completed in 2021, 7 Stories, 66 Residential Units                                   |
| Sora Apartments                                    | 4239 8th Ave NE              | Completed in 2021, 7 Stories, 54 Residential Units                                   |
| UW - Oak Hall                                      | 4295 Little Canoe Channel NE | Completed in 2021, 5 Stories, 155 Residential Units                                  |
| Ace Apartments                                     | 5020 15th Ave NE             | Completed in 2021, 4 Stories, 31 Residential Units                                   |
| University Flats                                   | 5521 15th Ave NE             | Completed in 2021, 4 Stories, 18 Residential Units                                   |
| UW - The Hans Rosling Center for Population Health | 3980 15th Ave NE             | Completed in 2020, 9 Stories, Approx. 300K SqFt                                      |
| DP Studios   | 802 NE 43rd St               | Completed in 2020, 6 Stories, 22 Residential Units                                   |
| Home 88  | 4523 8th Ave NE              | Completed in 2020, 6 Stories, 20 Residential Units                                   |
| UW - Interdisciplinary Engineering                 | 4000 East Stevens Way NE     | Completed in 2020, 4 Stories, Approx. 72K SqFt                                       |
| Fifty Two Apartments                               | 4714 20th Ave NE             | Completed in 2020, 4 Stories, 52 Residential Units                                   |
| Nors   | 5253 15th Ave NE             | Completed in 2020, 4 Stories, 28 Residential Units                                   |
| DXU Apartments                                     | 4230 11th Ave NE             | Completed in 2019, 7 Stories, 99 Residential Units                                   |
| The Stax   | 5001 Brooklyn Ave NE         | Completed in 2019, 7 Stories, 60 Residential Units, 1.5K SqFt of Ground Floor Retail |
| Cielo aPodment                                     | 4520 7th Ave NE              | Completed in 2019, 7 Stories, 120 Residential Units                                  |

| <i>Project Name</i>             | <i>Project Address</i>       | <i>Stats</i>  |
|---------------------------------|------------------------------|---|
| Sundodger Apartments            | 4218 Roosevelt Way NE        | Completed in 2019, 6 Stories, 110 Residential Units, 2K SqFt of Ground Floor Retail             |
| U20 Apartments                  | 4536 20th Ave NE             | Completed in 2019, 5 Stories, 64 Residential Units  |
| Thirty One Apartments           | 5637 University Way NE       | Completed in 2019, 4 Stories, 31 Residential Units  |
| WSECU Building                  | 1121 NE 45th St              | Completed in 2019, 7 Stories, 66K SqFt of Commercial Space, 6.2K SqFt of Ground Floor Retail    |
| UW - McCarty Hall               | 4330 Little Canoe Channel NE | Completed in 2018, 7 Stories, 341 Residential Units   |
| UW - Life Sciences Building     | 3747 West Stevens Way NE     | Completed in 2018, 6 Stories, Approx. 207K SqFt   |
| UW - Spratlen Hall              | 4320 Little Canoe Channel NE | Completed in 2018, 6 Stories, 523 Residential Units   |
| UW - Oliver Hall                | 4294 Little Canoe Channel NE | Completed in 2018, 6 Stories, 221 Residential Units   |
| Residential Development         | 4046 8th Ave NE              | Completed in 2018, 4 Stories, 37 Residential Units  |
| 5221 Ravenna Apartments         | 5221 Ravenna Ave NE          | Completed in 2018, 4 Stories, 35 Residential Units  |
| Residential Development         | 4263 7th Ave NE              | Completed in 2018, 4 Stories, 14 Residential Units  |
| UW - Burke Museum               | 4303 Memorial Way NE         | Completed in 2018, 3 Stories, Approx. 110K SqFt   |
| UW - West Campus Utility Plant  | 3900 University Way NE       | Completed in 2017, Approx. 19.3K SqFt   |
| Hub U District                  | 5000 University Way NE       | Completed in 2017, 7 Stories, 111 Residential Units, 236 Beds, 16K SqFt of Ground Floor Retail  |
| The Parsonage                   | 4138 Brooklyn Ave NE         | Completed in 2017, 7 Stories, 84 Residential Units, 147 Beds                                    |
| Ori on The Ave                  | 5260 University Way NE       | Completed in 2017, 7 Stories, 69 Residential Units, 4.2K SqFt of Ground Floor Retail            |
| Augusta Apartments              | 4041 Roosevelt Way NE        | Completed in 2017, 7 Stories, 210 Residential Units, 3.6K SqFt of Ground Floor Commercial Space |
| Arbora Court                    | 4750 15th Ave NE             | Completed in 2017, 7 Stories, 133 Residential Units   |
| 50th & Roosevelt                | 4750 Roosevelt Way NE        | Completed in 2017, 6 Stories, 60 Residential Units, 5K SqFt of Ground Floor Retail              |
| UW - NanoEngineering & Sciences | 1701 NE Grant Ln             | Completed in 2017, 5 Stories, Approx. 53K SqFt  |
| 7th Ave Place                   | 4229 7th Ave NE              | Completed in 2017, 5 Stories, 23 Residential Units  |
| Lavender Apartments             | 4519 18th Ave NE             | Completed in 2017, 4 Stories, 28 Residential Units  |
| Willet Apartments               | 4252 8th Ave NE              | Completed in 2017, 4 Stories, 20 Residential Units  |

## Projects Under Construction

| <i>Project Name</i>     | <i>Project Address</i>       | <i>Stats</i>   |
|-------------------------|------------------------------|--|
| Valhalla Apartments     | 4030 7th Ave NE              | 7 Stories, 40 Residential Units                              |
| UW - Haggett Hall       | 4290 Little Canoe Channel NE | 6 Stories, 800 Students Beds                                 |
| Residential Development | 5000 12th Ave NE             | 6 Stories, 49 Residential Units, 1K SqFt Ground Floor Retail |
| Residential Development | 4311 7th Ave NE              | 4 Stories, 46 Residential Units                              |
| 20th Avenue Apartments  | 4544 20th Ave NE             | 4 Stories, 31 Residential Units                              |
| Residential Development | 5115 24th Ave NE             | 4 Stories, 100 Residential Units                             |

## Projects Announced

| <i>Project Name</i>          | <i>Project Address</i> | <i>Stats</i>  |
|------------------------------|------------------------|---|
| OneX                         | 4522 Roosevelt Way NE  | Two Towers (22 Stories Each), 585 Residential Units         |
| University Temple            | 1415 NE 43rd St        | Two Towers (22 Stories & 14 Stories), 224 Residential Units |
| Residential Development      | 4140 Roosevelt Way NE  | Two Towers (20 Stories Each)                                |
| Residential Development      | 4525 9th Ave NE        | 33 Stories, 359 Residential Units                           |
| Nuovo Tower                  | 4512 11th Ave NE       | 32 Stories, 100 Residential Units, 168 Hotel Rooms          |
| University District Building | 1107 NE 45th St        | 28 Stories, 336 Residential Units                           |
| oLiv 50th Residence          | 1205 NE 50th St        | 25 Stories, 222 Residential Units                           |
| 1200 45th High Rise          | 1200 NE 45th St        | 24 Stories, 237 Residential Units                           |
| Roosevelt High Rise          | 4212 Roosevelt Way NE  | 23 Stories, 220 Residential Units                           |
| Residential Development      | 4131 Brooklyn Ave NE   | 23 Stories, 200 Residential Units                           |
| B45                          | 1300 NE 45th St        | 22 Stories, 342 Residential Units                           |
| Sunbreak Tower               | 920 NE 42nd St         | 16 Stories, 244 Residential Units                           |
| Residential Development      | 911 NE 50th St         | 13 Stories, 170 Residential Units                           |
| LIHI Building                | 1000 NE 45th St        | 12 Stories, 160 Residential Units                           |

| <i>Project Name</i>       | <i>Project Address</i> | <i>Stats</i>                     |
|---------------------------|------------------------|----------------------------------|
| Residential Development   | 4551 15th Ave NE       | 8 Stories                        |
| RIFT Apartments           | 818 NE 42nd St         | 8 Stories, 34 Residential Units  |
| Residential Development   | 4244 11th Ave NE       | 7 Stories, 50 Residential Units  |
| Ori Roosevelt             | 4709 Roosevelt Way NE  | 6 Stories, 70 Residential Units  |
| University Way Apartments | 5247 University Way NE | 6 Stories, 59 Residential Units  |
| Residential Development   | 1251 NE 50th St        | 6 Stories, 12 Residential Units  |
| Acre UW Tripalink         | 4637 21st Ave NE       | 5 Stories, 94 Residential Units  |
| Residential Development   | 4742 17th Ave NE       | 5 Stories, 90 Residential Units  |
| Residential Development   | 4521 19th Ave NE       | 5 Stories, 76 Residential Units  |
| Residential Development   | 5500 University Way NE | 5 Stories, 73 Residential Units  |
| Residential Development   | 708 NE 42nd St         | 5 Stories, 52 Residential Units  |
| Residential Development   | 4746 16th Ave NE       | 5 Stories, 38 Residential Units  |
| 21st U District           | 4626 21st Ave NE       | 5 Stories, 173 Residential Units |
| Residential Development   | 5300 Roosevelt Way NE  | 4 Stories, 52 Residential Units  |
| Residential Development   | 4715 21st Ave NE       | 4 Stories, 29 Residential Units  |



©Kevin Scott

*The U District's Role as a Regional Center Strengthened by*

# RAPID HOUSING DEVELOPMENT

The rapid growth of housing stock in the U District addresses both the immediate demand for more housing and the neighborhood's strengthened long-term economic position, as new developments allow for increased residential density. This concentration of residential development is fueled by the neighborhood's transit access, walkability, dense mix of resources, and other amenities, making the U District an attractive location for both residents and investors.

**16,300+**

*U District housing units*

**+27%**

*increase in housing units,  
2020 to 2025*

*Source: The Washington State OFM SAEP 2025*

## Expanding Housing Capacity to Meet Population Growth

To accommodate the U District's growing population, the 2017 upzone increased development capacity and spurred a rapid rise in multifamily construction. As a result, the number of housing units has expanded significantly in recent years, with continued growth expected as additional tower projects advance through the development pipeline.

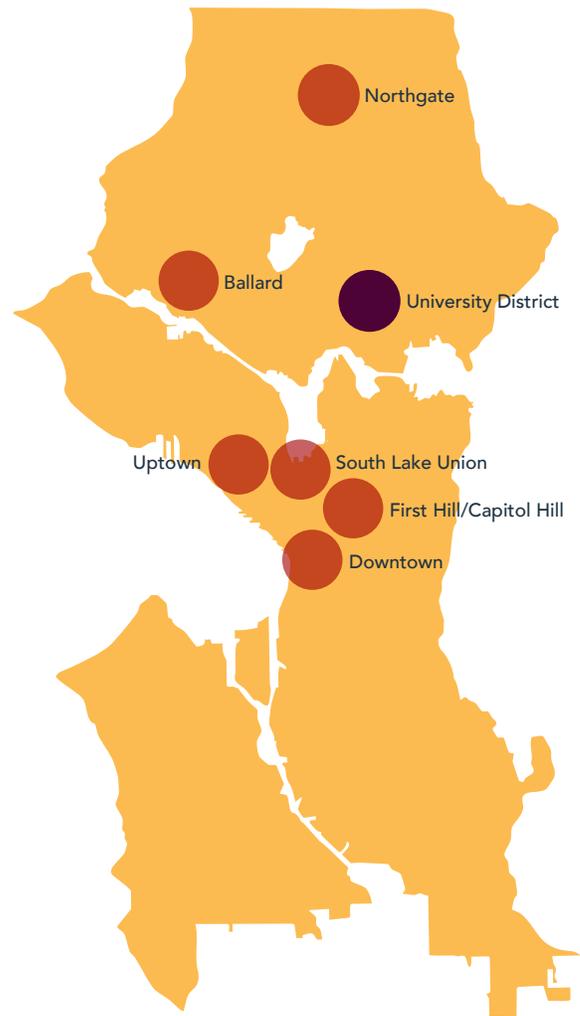


*Source: The Washington State OFM SAEP 2025*

## Seattle Focuses Major Residential Growth in the U District

The Puget Sound Regional Council designated the U District as a Regional Growth Center in 1995, recognizing its role as a major hub for economic activity, population growth, and regional transit. This status continues under the City of Seattle's 2025 Comprehensive Plan, which identifies the U District as one of the city's primary centers for jobs, commerce, and high-capacity transit.

As a Regional Center, the U District is expected to absorb a substantial share of Seattle's future growth in the decades ahead—reflecting its importance to the city's economic success and long-term development strategy. To guide this growth, the neighborhood will receive a dedicated subarea plan beginning in 2026.



*The City of Seattle projects that the U District will add at least 4,000 new housing units and 3,500 new jobs over the next 20 years.*

*Source: City of Seattle Comprehensive Plan 2025*

## Stable Housing Demand Reflected in Long-Term Occupancy Rates

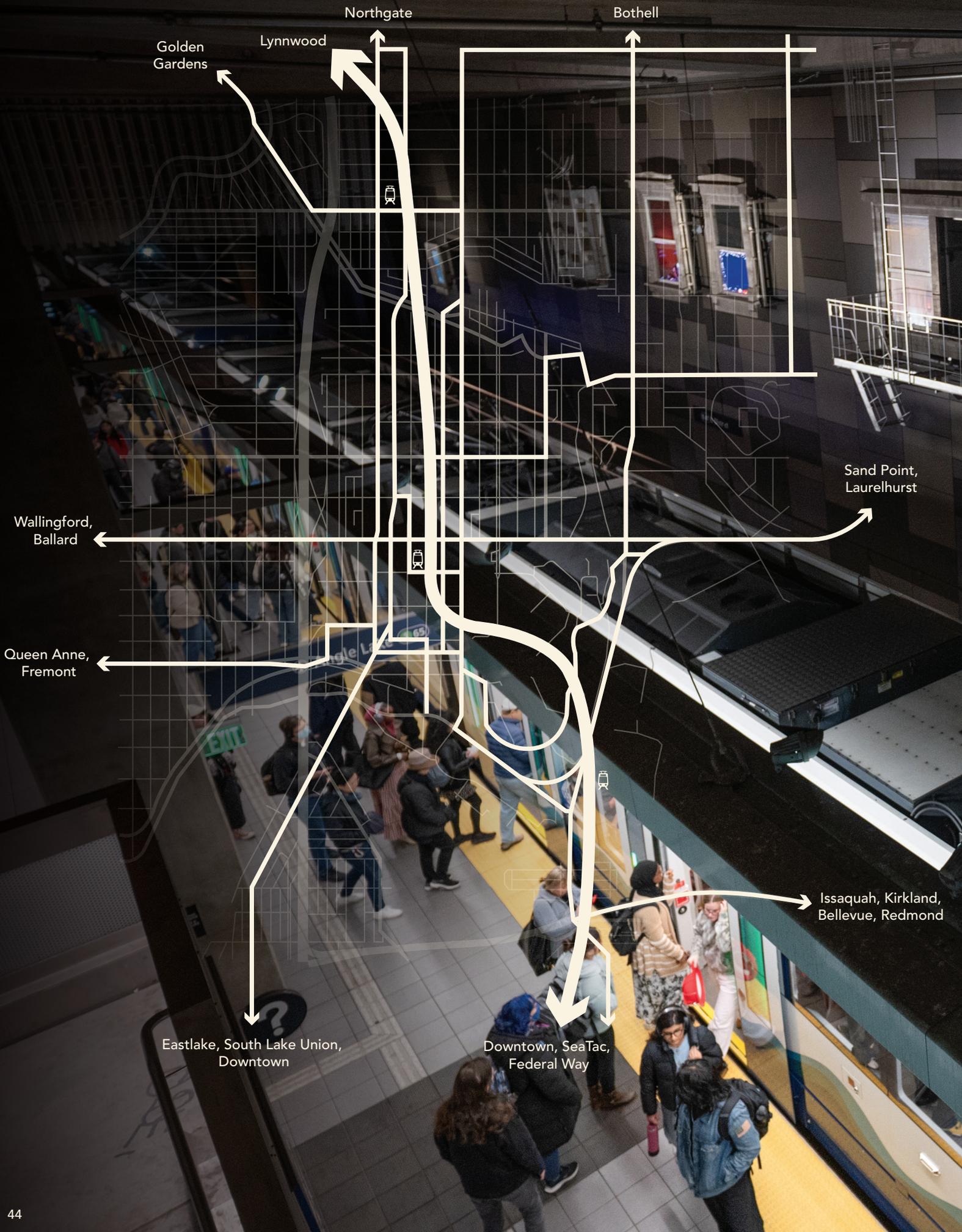
Housing demand in the U District has remained strong and resilient over the past 15 years. Occupancy rates consistently hover around 90 percent, even as new multifamily buildings are constructed. The steady absorption of new units shows that household demand keeps pace with rapid development.

# 90.3%

*U District housing occupancy rate, 15 year average (2010 to 2025)*

*Source: The Washington State OFM SAEP 2025*





Golden Gardens

Lynnwood

Northgate

Bothell

Sand Point, Laurelhurst

Wallingford, Ballard

Queen Anne, Fremont

Issaquah, Kirkland, Bellevue, Redmond

Eastlake, South Lake Union, Downtown

Downtown, SeaTac, Federal Way



# AWELL CONNECTED

## *Economic Hub*

The U District is one of Seattle’s most transit-rich, walkable, and bike-friendly neighborhoods, offering residents and visitors seamless access across the city and region. Major infrastructure investments—most notably light rail—have strengthened the neighborhood’s connectivity, anchoring it as a regional mobility hub with links to Eastside cities, Federal Way to the south, and Bothell and Lynnwood to the north.

At the local level, streets and sidewalks support easy movement throughout the neighborhood, complemented by a growing network of micromobility options that make navigating the district convenient and efficient. The Burke-Gilman Trail also provides a protected route for bikes and pedestrians, connecting the U District to other parts of the city.

This combination of regional access and pedestrian-friendly infrastructure not only supports the U District’s rapid growth but also ensures the neighborhood has the mobility framework in place to meet the needs of residents, workers, and visitors alike.

Welcome to the U District



# CONNECTIVITY

*as a Competitive Advantage*

The U District ranks within the top 25 percent of Seattle neighborhoods for walkability, transit access, and bicycle infrastructure, making it one of the city's most accessible areas. In addition, the U District is tied with Capitol Hill as the most walkable neighborhood outside of Downtown Seattle.

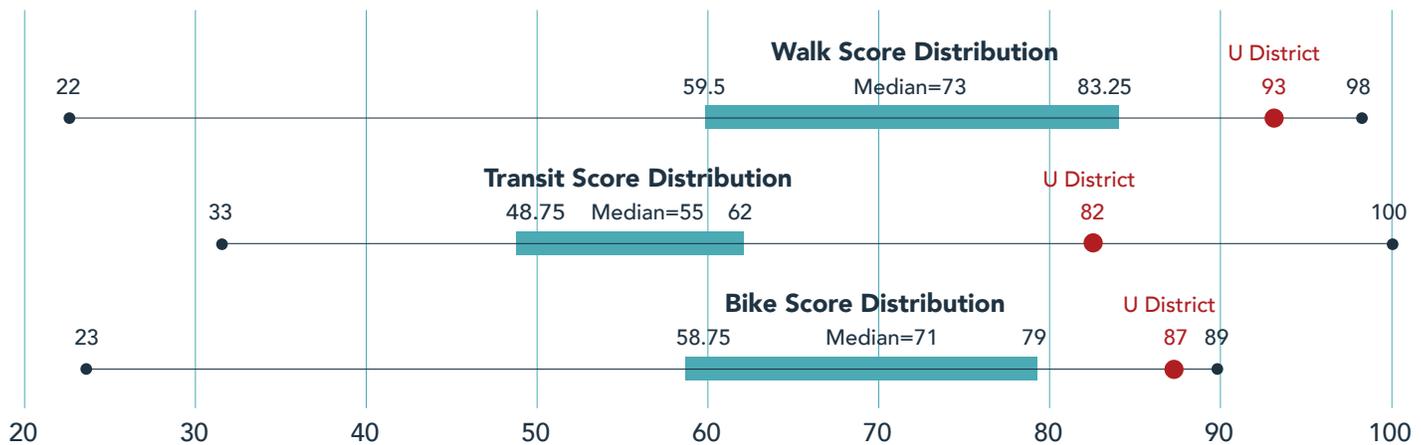
**THE AVE** *Walk Score: 99*  
*Transit Score: 83*  
*Bike Score: 85*

**U DISTRICT** *Walk Score: 93*  
*Transit Score: 82*  
*Bike Score: 87*

**SEATTLE OVERALL** *Walk Score: 74*  
*Transit Score: 60*  
*Bike Score: 71*

## U District Outperforms Other Seattle Neighborhoods in Measures of Mobility

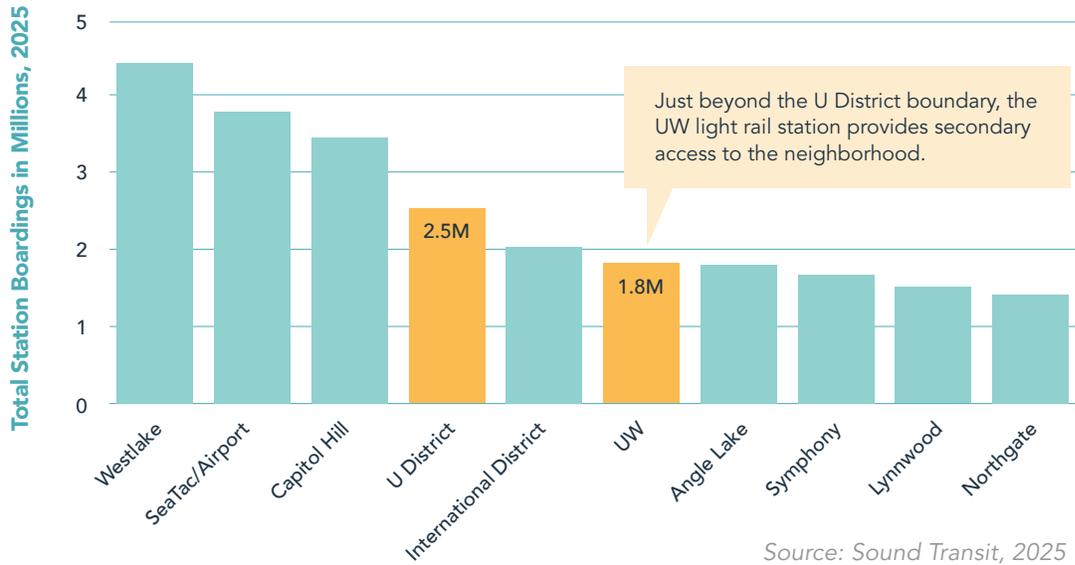
The box plots below show the distribution of Walk, Transit, and Bike Scores across 80 Seattle neighborhoods, as defined by WalkScore. The red dot represents the U District's position within each distribution, highlighting its consistently strong performance across all three mobility measures.



Source: Walk Score, 2025

# New U District Light Rail Station Ranks Fourth in Ridership

The U District’s transit network is anchored by its light rail station, which opened in 2021 and quickly became one of the system’s busiest. This connectivity has spurred a surge in transit-oriented development and continues to attract significant investment around the station, reinforcing its role as a central nexus.



Average weekday bus ridership rebounds:

# 72.8%

of 2019 Levels

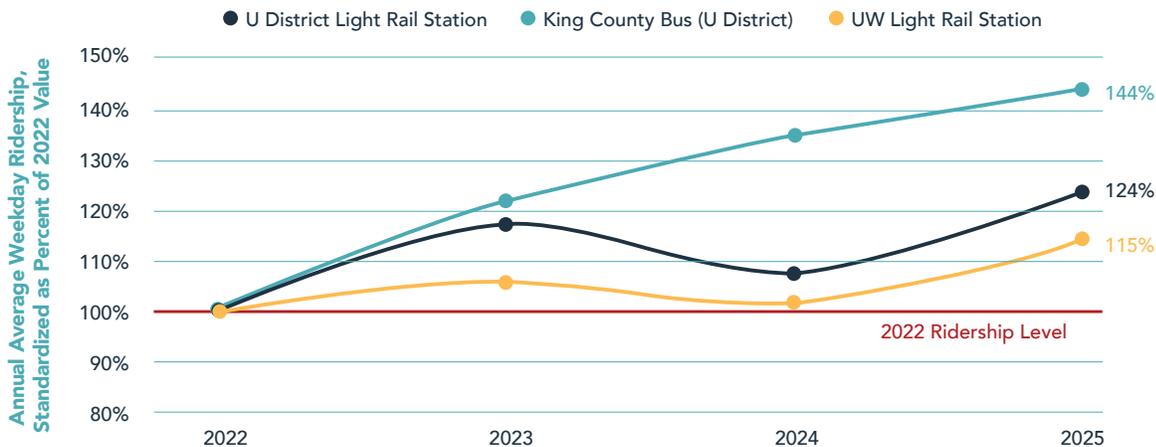
Average weekday ridership on King County Metro bus routes serving the U District reached 72.8% of 2019 levels in 2025, signaling continued movement toward recovery even as light rail has absorbed a share of former bus demand.

Source: King County Metro, 2025

## Growing Ridership Reflects Strong Transit Demand in the U District

Transit activity in the U District is trending upward overall, based on year-over-year comparisons of average weekday ridership. Both light rail and King County Metro bus lines serving the U District now exceed their 2022 ridership levels. Light rail experienced a slight dip in 2024 but has since fully rebounded, while Metro bus ridership has increased steadily each year since 2022.

Boardings at the U District and University of Washington Light Rail stations, along with ridership on bus lines serving the neighborhood, are shown as a percentage of 2022 levels. This standardization allows for consistent comparison of ridership growth across transit modes.



Sources: King County Metro & Sound Transit, 2022-2025



*Major Transit Projects*

# EXPAND ACCESS

*to the U District*

## **\$1.9 Billion Light Rail Expansion Transforms the U District**

Sound Transit's investment in the U District Light Rail Station has transformed access to the neighborhood and strengthened its transit network. Opened in 2021 as part of a \$1.9 billion light rail expansion, the station connects the U District to Downtown Seattle, SeaTac, the stadium district, and destinations between Federal Way and Snohomish County, providing fast and reliable transit for residents, workers, students, and visitors. The planned 2026 light rail extension to Redmond and Bellevue will further expand the U District's regional connectivity.

*Source: Sound Transit*

## **Transforming NE 43rd Street Into a Safe, Pedestrian-Friendly Gateway**

Recent public and private investment in NE 43rd Street has transformed the corridor into a safer, more pedestrian-friendly gateway that strengthens connections to the U District Light Rail Station. Project improvements include widened sidewalks, a public plaza, outdoor seating, enhanced crosswalks, and dedicated bike lanes, creating a more accessible and comfortable environment for all people and vehicles. Planned improvements to nearby NE 42nd Street in the coming years will build on this momentum, further expanding the neighborhood's pedestrian and green corridors and reinforcing the area's role as a key multimodal connection point.

*Source: Seattle Department of Transportation*

## **\$128.5 Million Investment in RapidRide Bus Lines Will Soon Serve the U District**

The RapidRide J Line, a \$128.5M project, represents a significant public investment in enhancing transit connectivity for Seattle's U District. Scheduled for completion in the coming years, this high-capacity, frequent bus service will establish connections between the U District to neighborhoods like Eastlake, South Lake Union, and Downtown Seattle—providing a faster, more reliable alternative to traditional bus routes. With dedicated bus lanes, signal priority, and improved stops, the J Line is designed to reduce travel times and increase accessibility for residents, students, and workers.

*Source: Seattle Department of Transportation*



**10.13%**

*of all Seattle Lime rides start or stop in the U District, 2025*

*The number of Lime rides in the U District increased*

**112%**

*from 2024 to 2025*

*Source: Lime, 2025*

## Shared Micromobility Strengthens Local Connectivity in the U District

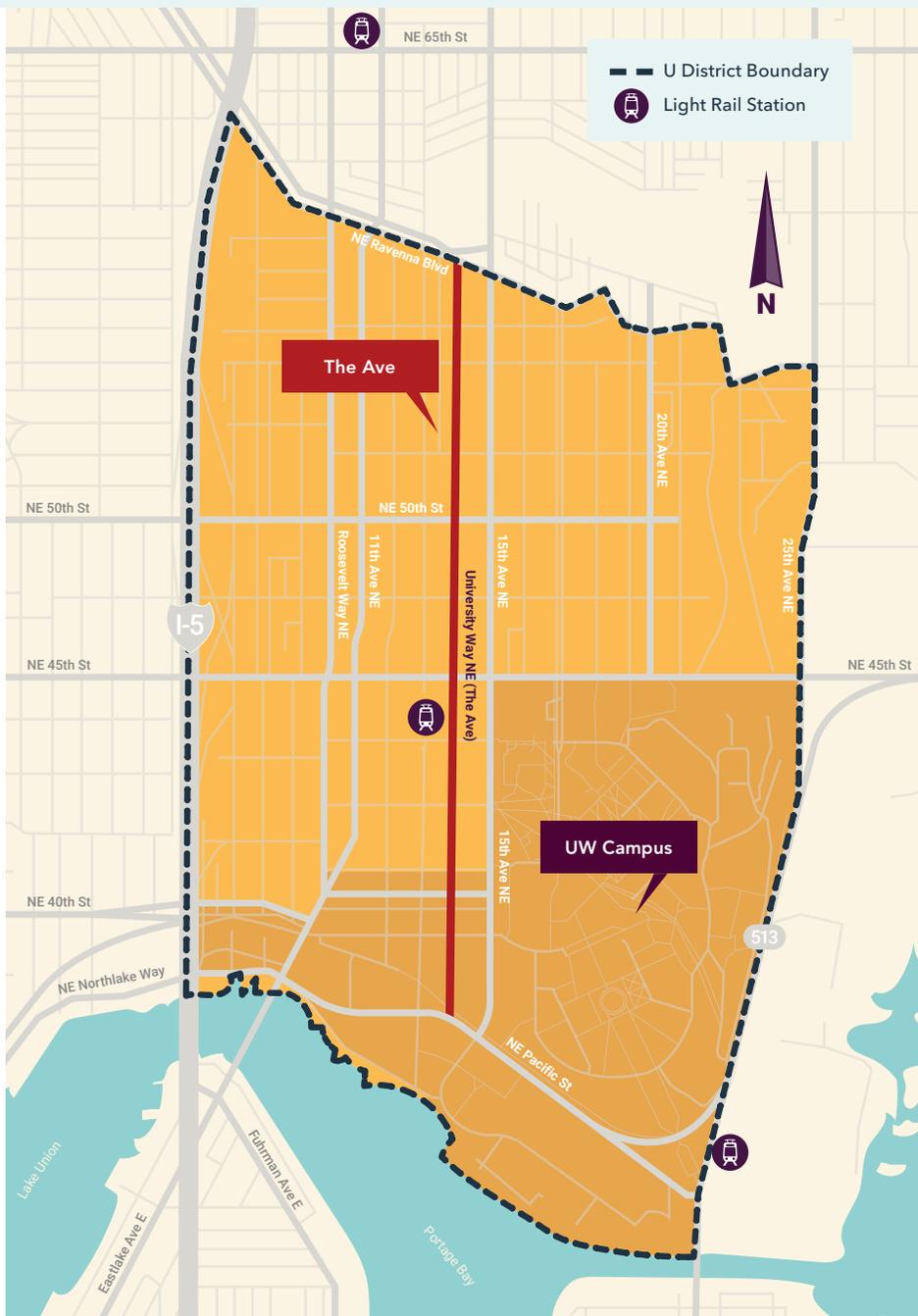
The U District benefits from a robust micromobility network, particularly through shared electric scooters and bikes operated by Lime. Seattle ranks among Lime’s highest-performing markets nationwide, and the U District consistently records some of the highest usage levels in the city. These short-term rentals are rapidly growing in popularity, shrinking perceived distances within the neighborhood and enabling students to travel easily from campus, residents to reach key activity hubs, and visitors to navigate the district efficiently without relying on cars.



Defining the

# U DISTRICT

For the purposes of this report, Seattle's University District—the “U District,” shown in yellow—is defined as the area bounded by I-5, 25th Ave NE, NE Ravenna Boulevard, and the Portage Bay Waterfront, unless otherwise noted. The University Village shopping center lies outside this boundary and is not included in this definition of the U District.



## “The Ave”

A key geography referenced when discussing the U District is “the Ave,” the commercial corridor along University Way NE that runs through the center of the neighborhood.

While there are several commercial corridors in the U District, “the Ave” contains the largest concentration of street-level businesses, extending for more than a mile. This corridor functions as the spine of the neighborhood, though businesses and activity continue to thrive both on and off “the Ave.”

## The University of Washington

The University of Washington (UW) academic and medical campuses account for roughly 36% of the U District’s land area, making them a central part of the neighborhood. The campuses draw large numbers of people who move to and through the area, shaping foot traffic, transit use, and commercial demand throughout the broader U District, even beyond campus boundaries.

## Data Sources & Methodology

This report integrates both quantitative and qualitative data to present a comprehensive and reliable overview of the U District economy. The data are drawn from a combination of public, proprietary, and locally collected sources and, where feasible, are cross-checked and supplemented through on-the-ground triangulation and verification. For questions, requests for clarification, or to explore any of the data in greater detail, please contact Hannah Kiburz, Economic Development Manager, at [hannah@udistrictpartnership.org](mailto:hannah@udistrictpartnership.org)

### Foot Traffic & Visitor Activity | Placer.ai

Foot traffic data comes from the Placer.ai platform, which uses anonymized mobile device location data to estimate visitation trends, peak activity periods, and basic information about who is visiting the neighborhood and for what purpose. Note: Placer.ai data includes only devices with U.S. phone numbers; international visitors are not captured.

This report uses visits as the primary foot traffic metric. A visit is counted when a device enters the U District geofence and remains for more than 10 minutes, a filter designed to exclude pass-through traffic.

Audience definitions—including Residents, Employees, and Out-of-Market Visitors—are based on Placer.ai's analysis of behavioral patterns such as time of day, length of stay, and frequency of visits within the U District geofence.

All data reported from Placer.ai was pulled on January 18, 2026.

### Residential Population & Housing | The Washington State OFM SAEP 2025

Population and housing data come from the Washington State Office of Financial Management's Small Area Estimates Program (OFM SAEP), released in Fall 2025. The SAEP provides up-to-date estimates for small areas using data collected both during and between the decennial censuses, offering more current insights than the census alone.

### Resident Demographics | US Census Bureau, ACS 2019-2023

Resident demographic data is sourced from the US Census Bureau's American Community Survey (ACS) 2019-2023, the most up-to-date dataset available for the 2025 reporting period. The ACS provides updated estimates between decennial census cycles. Data has been adjusted using ArcGIS Business Analyst to better align and summarize information from census geographies within the U District boundary used in this report.

### University of Washington

Data for this report from the University of Washington comes from several sources:

Economic Impact: FY23 figures from "The Economic Contribution of the University of Washington to the Statewide, Local, and National Economies," available on the UW website.

Student Demographics & Enrollment: Data from the UW Office of Planning & Budgeting and the UW Office of Hospitality & Food Services, reflecting the 2025–26 academic year (fall quarter).

Athletics Attendance: Data provided by the UW Athletics Department on sports event attendance.

### Workforce | US Census Bureau OnTheMap, 2023

Workforce and employment data sourced from the U.S. Census Bureau's OnTheMap tool, with data available through calendar year 2023.

### Commercial Economy | The U District Partnership Business Inventory, 2025

Business data for this report comes from a ground-level survey conducted by The U District Partnership through on-foot canvassing of the neighborhood. Businesses are tracked by documenting openings, closures, and vacancies. The most recent full survey was completed in November 2025, with updates made throughout the year as changes occur. For the purposes of this report, business data is accurate as of December 31, 2025.

When possible, businesses not located on the ground floor are verified using building directories, Google listings, and property websites. Apartment management offices and religious institutions are excluded from calculations in this report.

### Real Estate Development

Development pipeline data is compiled by The U District Partnership using information from Seattle in Progress permit records, CoStar, and UW Facilities, including details on building heights, residential units, and square footage. Whenever possible, this data is cross-checked and verified through project websites, architectural plans, and direct outreach to project stakeholders.

### Transportation and Mobility

Transportation and mobility data comes from publicly available sources including Sound Transit, King County Metro, and Walk Score. Scooter usage data comes from Lime.

King County Metro routes included in this analysis are: 31, 32, 44, 45, 48, 65, 67, 70, 75, 79, 255, 271, 372, 542, and 556. Routes 513 and T Line are excluded due to lack of data availability.

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