2011 MID/DSA MULTI-COUNTY STAKEHOLDER STUDY

Executive Summary

This study, in its benchmark year, evaluates how Puget Sound residents view Downtown Seattle as a unique and preferred destination to shop and play. In so doing, its focus is on identifying the perceived strengths and weaknesses in Downtown Seattle's offerings, improvements that could be made and the demographic profiles of visitors and non-visitors. The study was conducted by EMC Research, an independent research provider, who sampled the opinions of 1,003 Puget Sound residents. In addition to appraising the current offerings in Downtown Seattle, the study also examines how individuals travel to Downtown, the present state of urban destination competition and what are the main sources of information about Downtown that they access. Interviews were conducted from April 27 through May 11, 2011.

Perception – **For the entire survey region, half (51%) consider Downtown Seattle to be their preferred destination for a day of shopping and entertainment.** Connections with Downtown have a significant influence on whether you consider it a preferred destination. If you live and/or work in Downtown you are more likely to agree (58%) that Downtown Seattle is your preferred urban destination. Those who visit Downtown once a month or more are very likely to think of it as their preferred destination (67%).

Branding – **Open-ended descriptions of Downtown Seattle are a mixed bag of responses and closely divided between positive (34%), negative (29%) and neutral (37%) mentions.** This description mix leans more positive (e.g., attractive, pleasant, active, etc.) for those connected by work and/or residence to Downtown (42%). General negative comments include congested, crowded and lots of people.

Barriers – **The expense of parking and the hassle of getting Downtown are key barriers**. Two-thirds of respondents (65%) agree they'll often avoid going Downtown because parking is too expensive. This reaction was expressed with strong agreement across all major subgroups. Over half (53%) said the hassle of the trip Downtown is a barrier to them visiting. Interestingly, two-thirds (65%) of respondents said ease of parking is very important in their decision as to where to shop.

Transportation – **The closer you live to Downtown, the more likely you are to take transit to get there.** Infrequent visitors are more likely to be driving to get Downtown. The youngest (18-29) and oldest (65+) age groups are most likely to take transit to Downtown.

Competition – **Downtown Seattle is in direct competition with a host of destinations with unique offerings.** While it is the top choice destination for Downtown (43%) and Bainbridge Island (45%) respondents, it faces strong competition among residents in the other major geographic areas.

Information sources – **Sources for hearing about events and activities Downtown are evenly split between traditional media (50%) and online/social/media/word of mouth (46%) sources.**

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