SALT LAKE DOWNTOWN ALLIANCE

2013 Baseline Research | Year Five

RICHTER7

OBJECTIVES AND METHODOLOGY

RESEARCH OBJECTIVES

2013 objectives are consistent with previous years' baseline studies, while adding new areas of interests.

- Determining the purposes of visitation to downtown Salt Lake
- Gauging interest in various activities and attractions in the downtown area
- Gathering community feedback on primary motivations and barriers to downtown visitation
- Evaluating awareness and attendance of primary Downtown Alliance events
- Learning if/how community members feel connected with the downtown area
- Attractors and detractors for Utah residents to move and live downtown
- Find out perception and affect that homelessness and panhandling is having on visitors to Downtown
- Measure current levels of interest in, visitation to, and awareness of downtown Salt Lake, especially in the areas of dining, shopping, and entertainment
- Compare 2013 metrics to benchmarks established in 2009-2012

RESEARCH METHODOLOGY

10 – 12 minute telephone survey

- 401 completed surveys
- Representative sample of Utah adult population
- Low response rate in rural Counties reflective of statewide population distribution (did not oversample)
- +/- 4.8% margin of error
- Some significant changes to new questions to gain deeper insight into main areas of interest
- Broad access to both landline and mobile phone lists

RESEARCH METHODOLOGY

Data collection by Lighthouse Research

- Member of SL Chamber of Commerce since 1998

Data analysis and strategic recommendations by Richter7

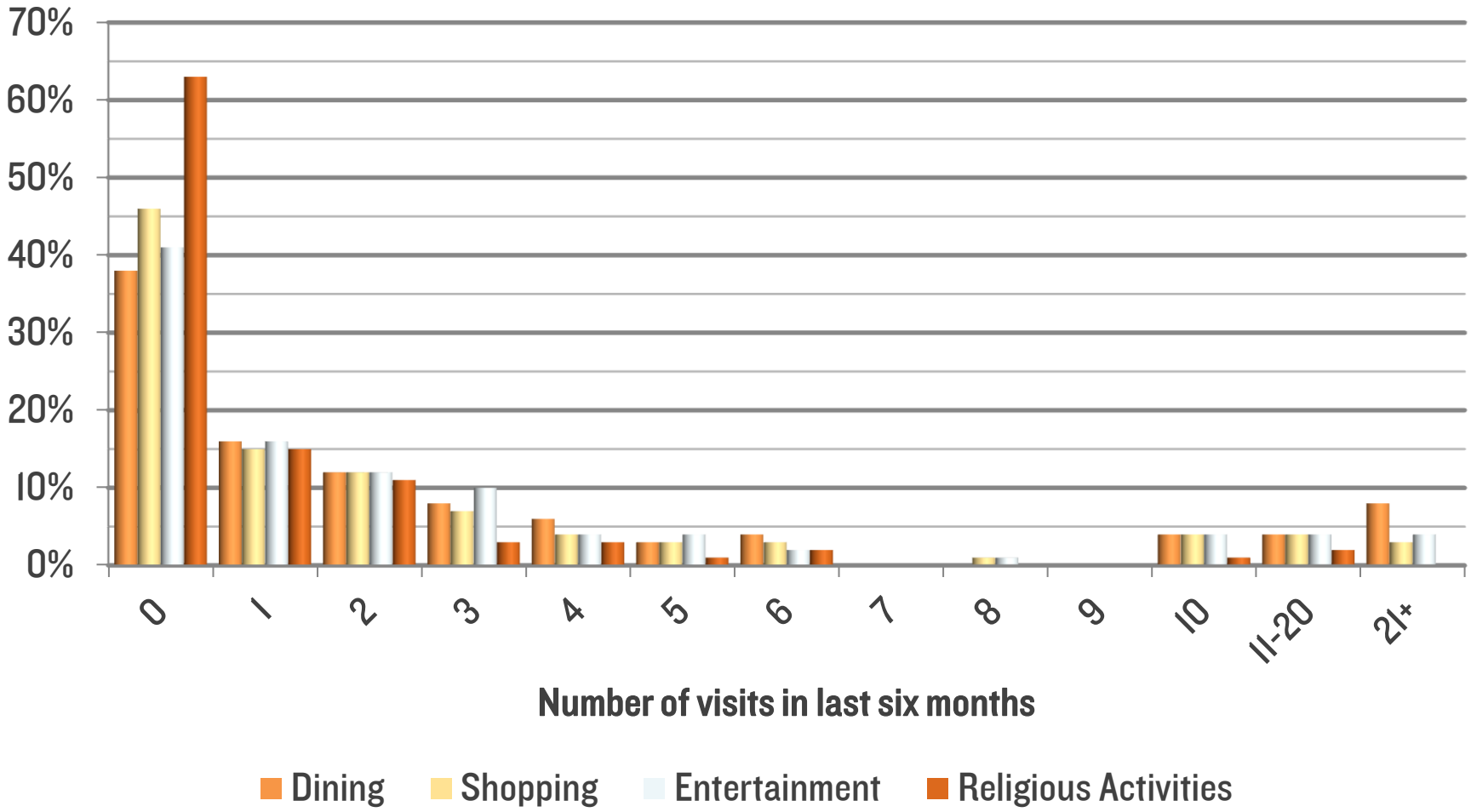
- Member of SL Chamber of Commerce since 2000

VISITATION TO DOWNTOWN

DINING, SHOPPING, RELIGIOUS
AND ENTERTAINMENT

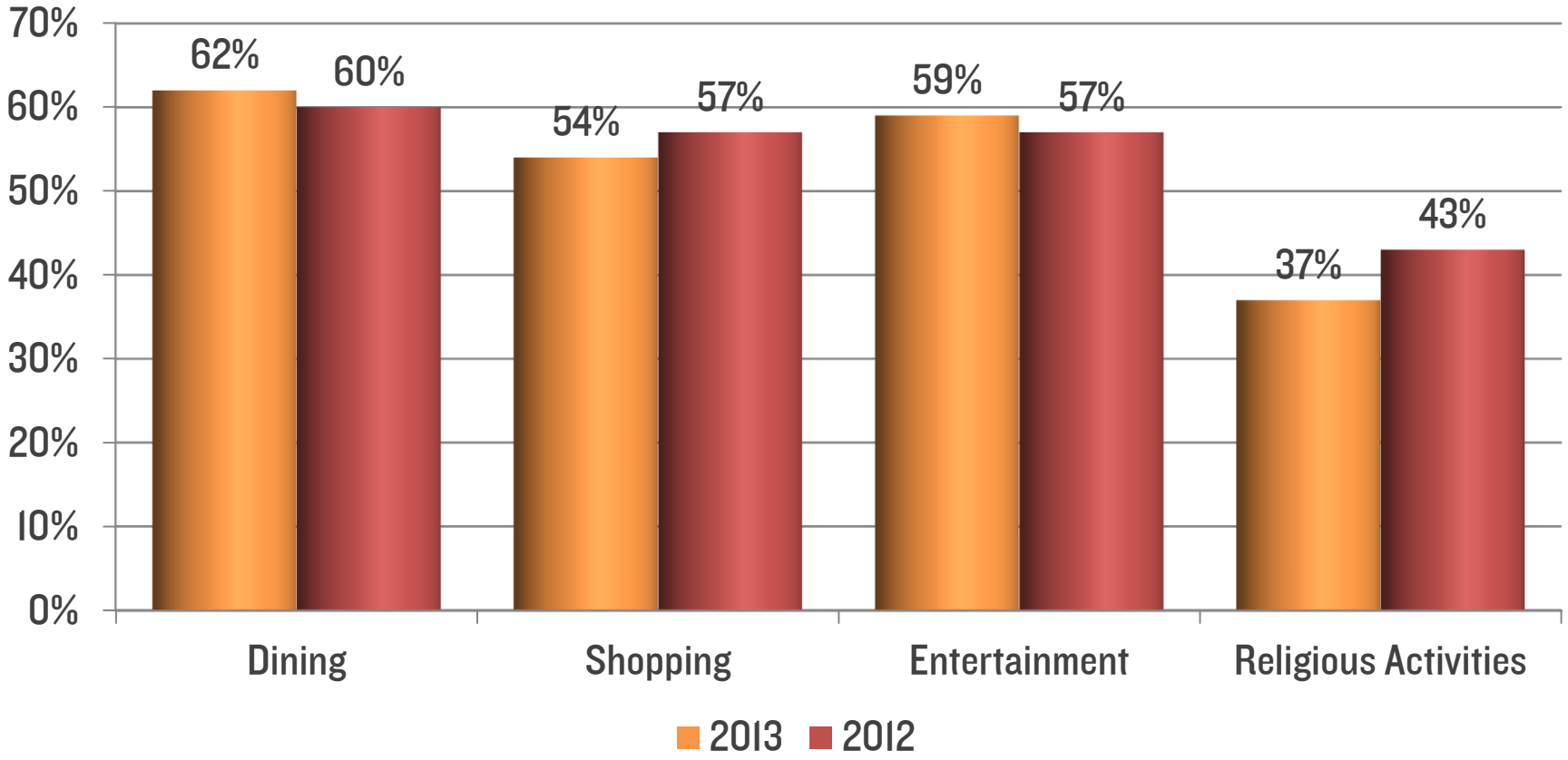
SUMMARY: VISITS DOWNTOWN IN LAST 6 MONTHS

Q: How many times have you visited Downtown Salt Lake in the last 6 months for the following activities?



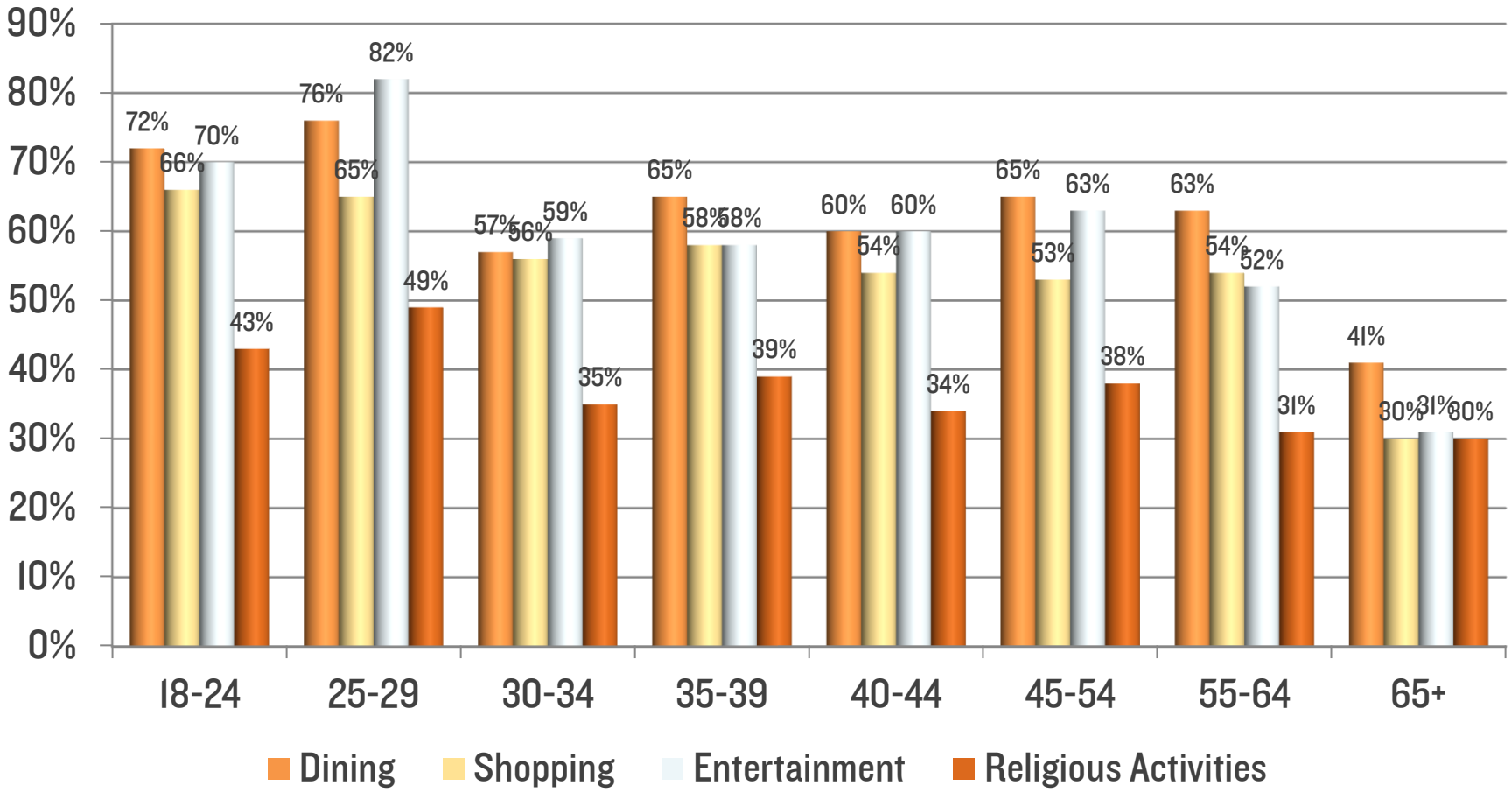
SUMMARY: VISITS TO DOWNTOWN BY ACTIVITY

Below is the percentage of respondents who answered that they have visited Downtown once or more in the last six months for the listed activities. The data is compared to 2012.



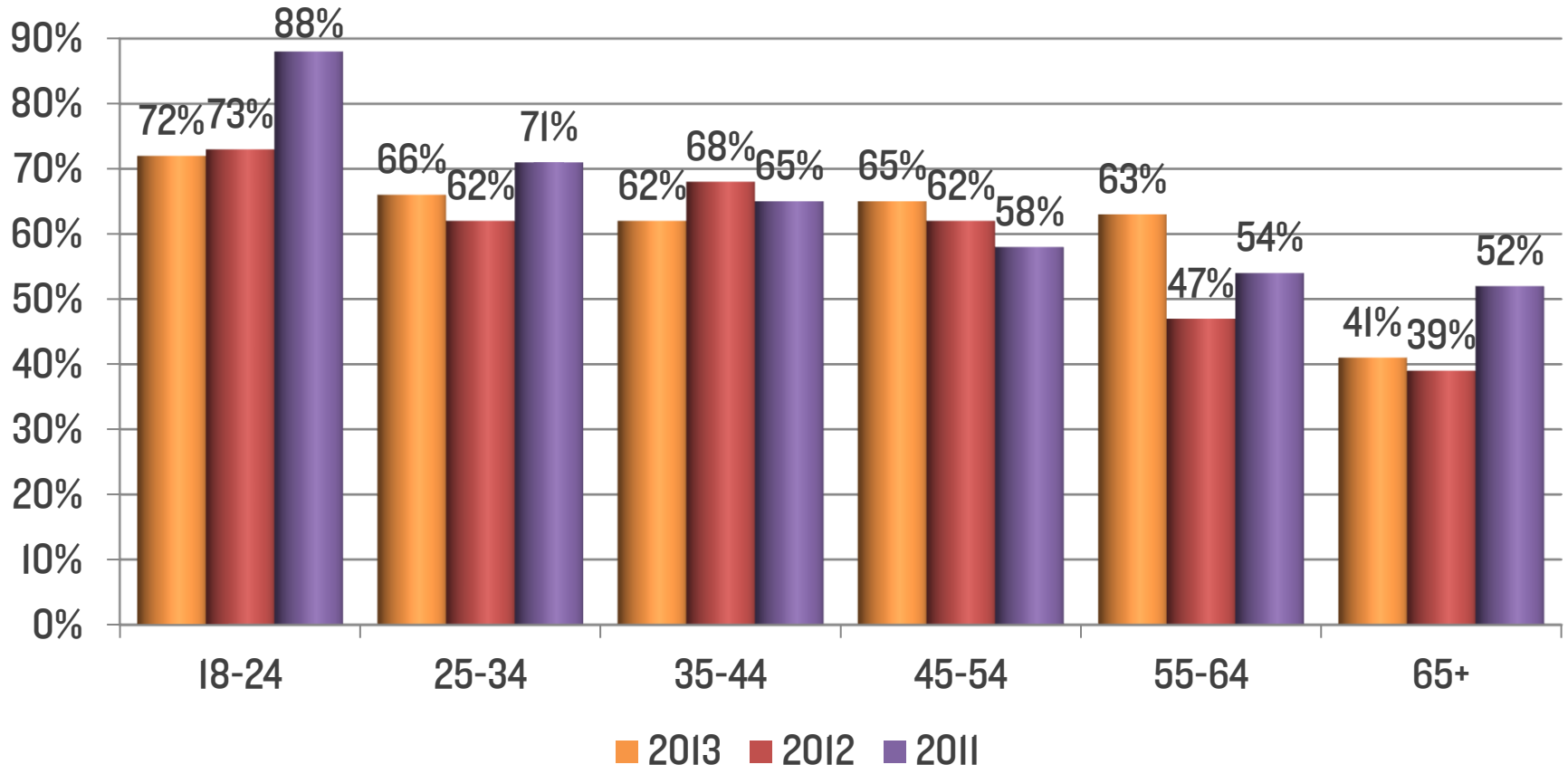
SUMMARY: VISITS DOWNTOWN IN LAST 6 MONTHS (BY AGE)

The chart below shows the percentage of respondents within each age group that indicated they had made at least one visit to Downtown Salt Lake for each of the specified activities in the last six months.



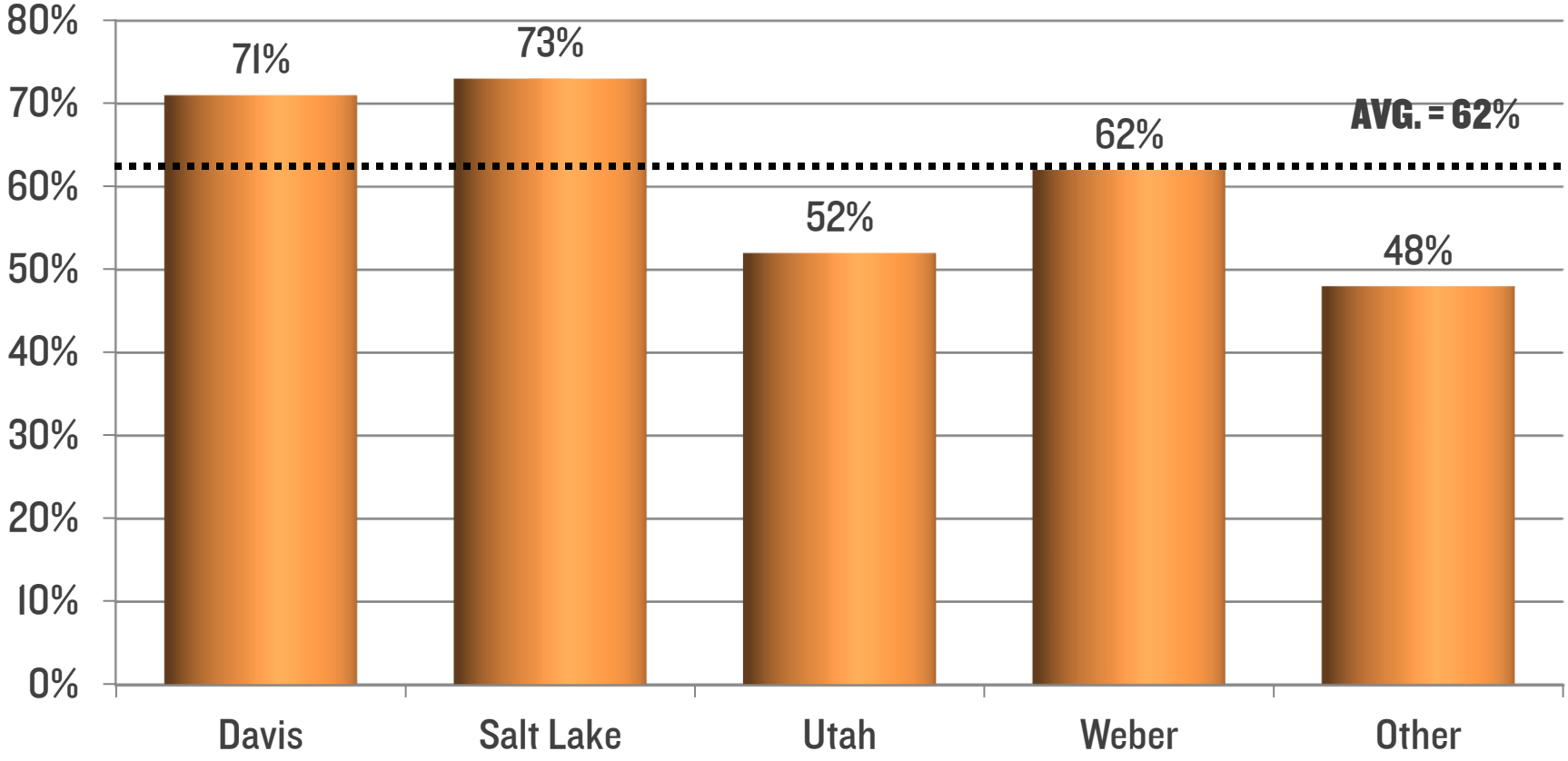
DINING DOWNTOWN IN LAST 6 MONTHS (BY AGE)

Responses remained similar to 2012 for respondents under 55; however, the 55 - 64 age group saw a significant spike from 47% in 2012 to 63% in 2013.



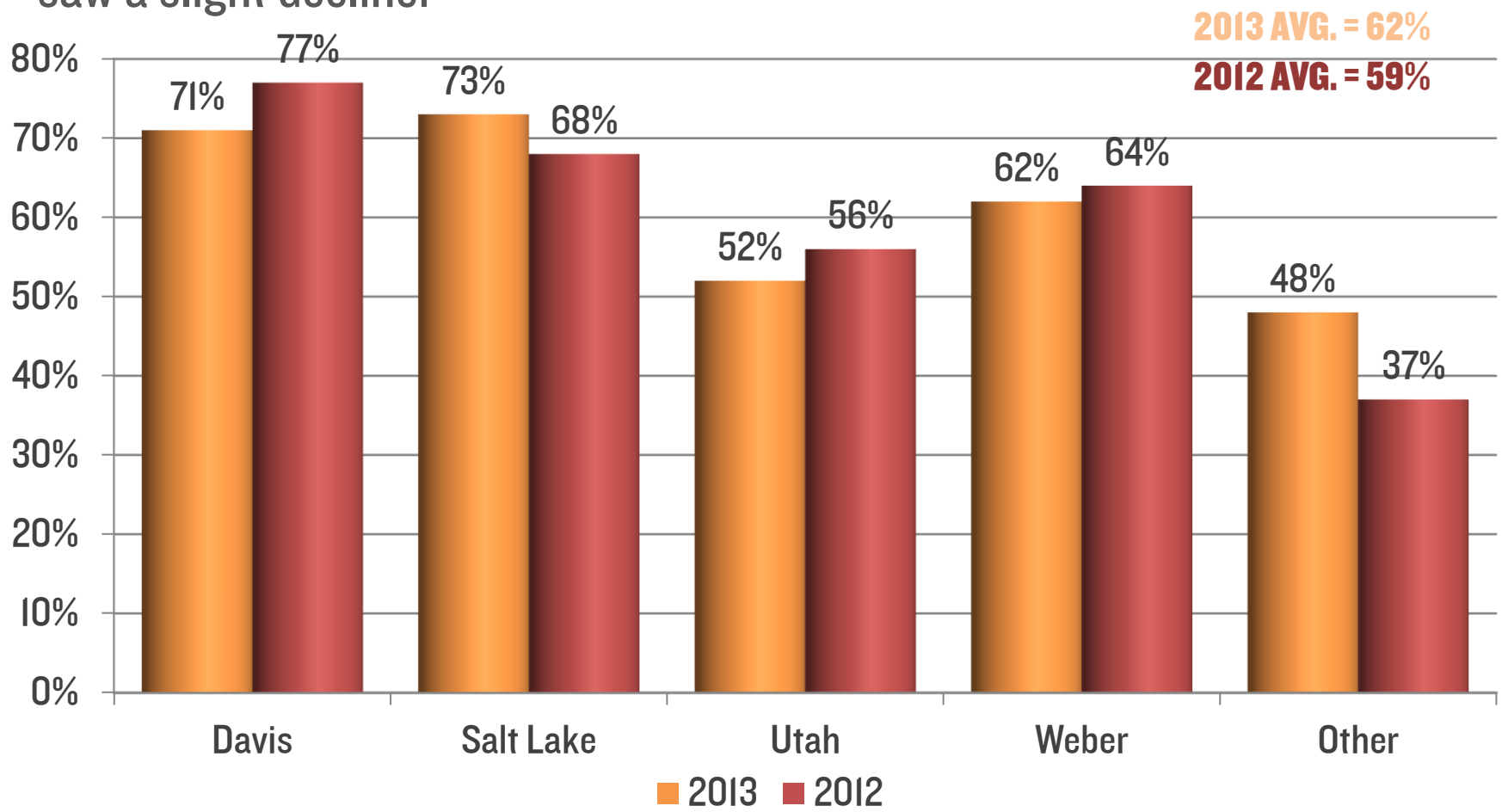
DINING DOWNTOWN IN LAST 6 MONTHS (BY COUNTY)

Almost three-fourths of respondents living in Salt Lake and Davis Counties indicated they had dined downtown during the last six months (73% and 71%, respectively). Although at somewhat equal and opposite ends of the Valley, Weber County residents visited downtown for dining more than Utah County, but was still at the statewide average.



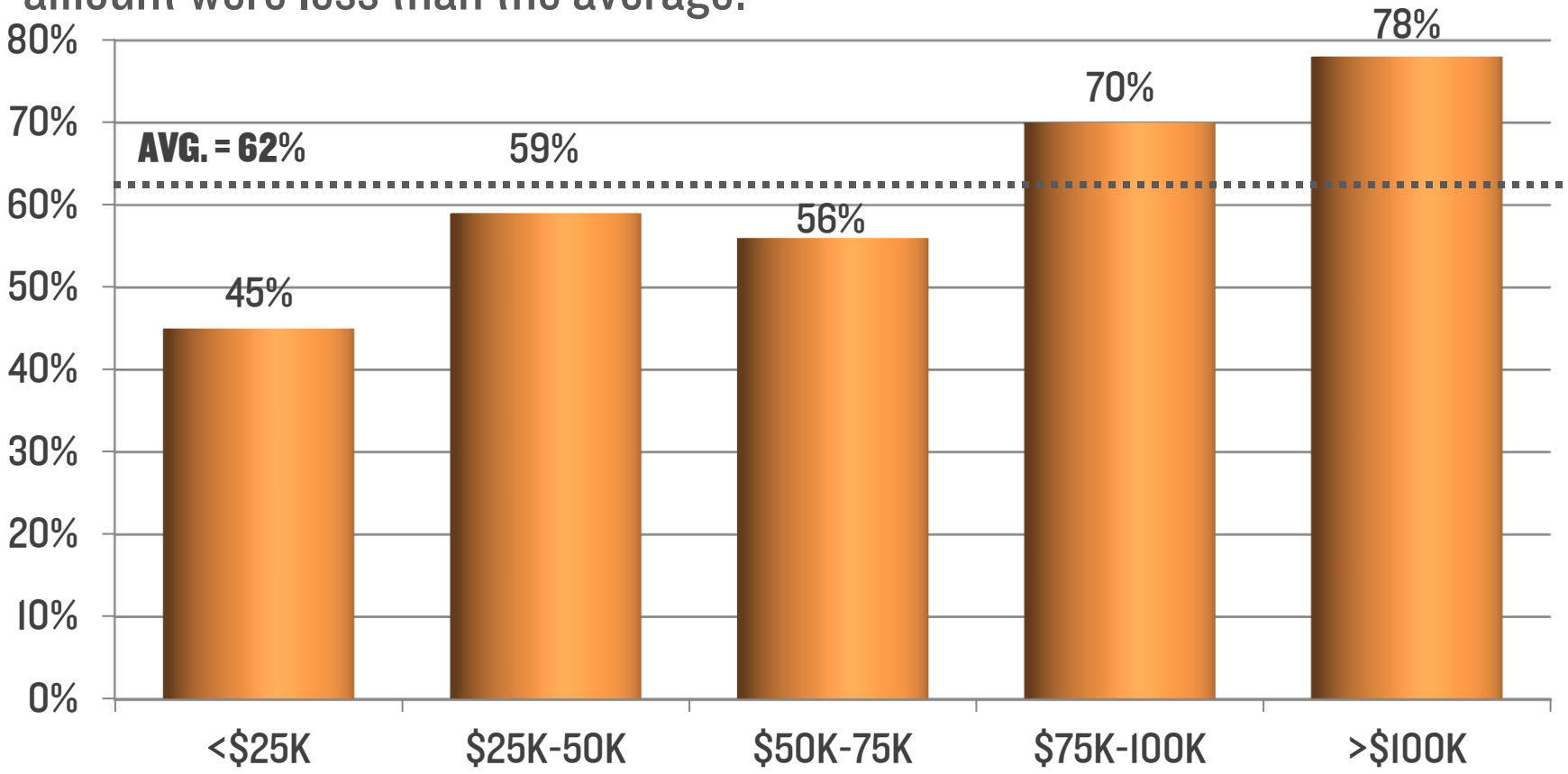
DINING DOWNTOWN IN LAST 6 MONTHS (BY COUNTY)

Comparing 2012 responses, 2013 saw a slight rise in average visitors coming to dine. The biggest difference was found in Other Counties, seeing an increase from 37% to 48%. Davis, Utah and Weber Counties all saw a slight decline.



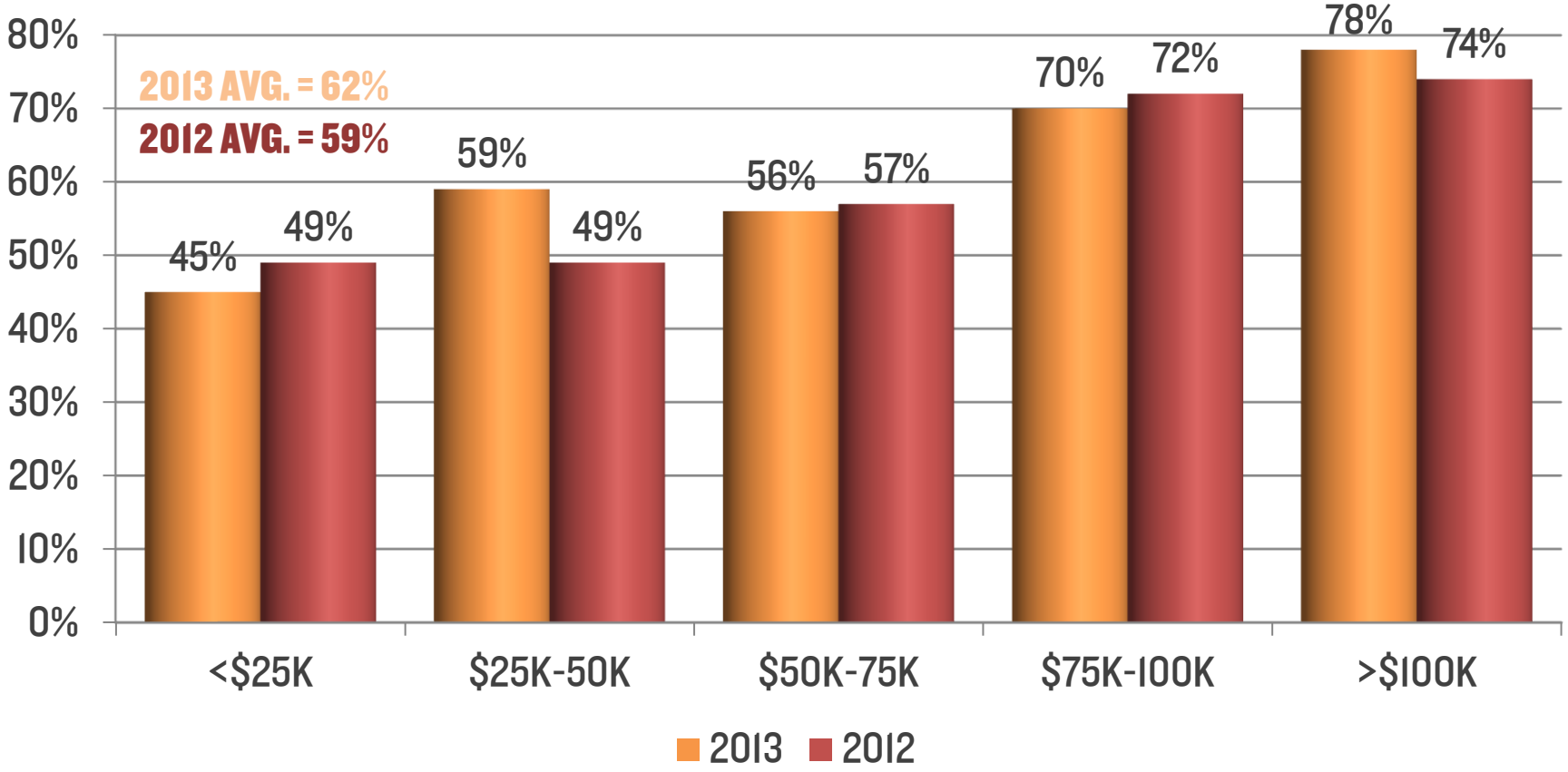
DINING DOWNTOWN IN LAST 6 MONTHS (BY INCOME)

As HHI increased, so did the likelihood a respondent dined downtown in the past six months. There was not a large difference in the $25–50K and $50–75K segments. Also, there is a noticeable split at the $75K amount, with HHI being above the statewide average, while those under that amount were less than the average.



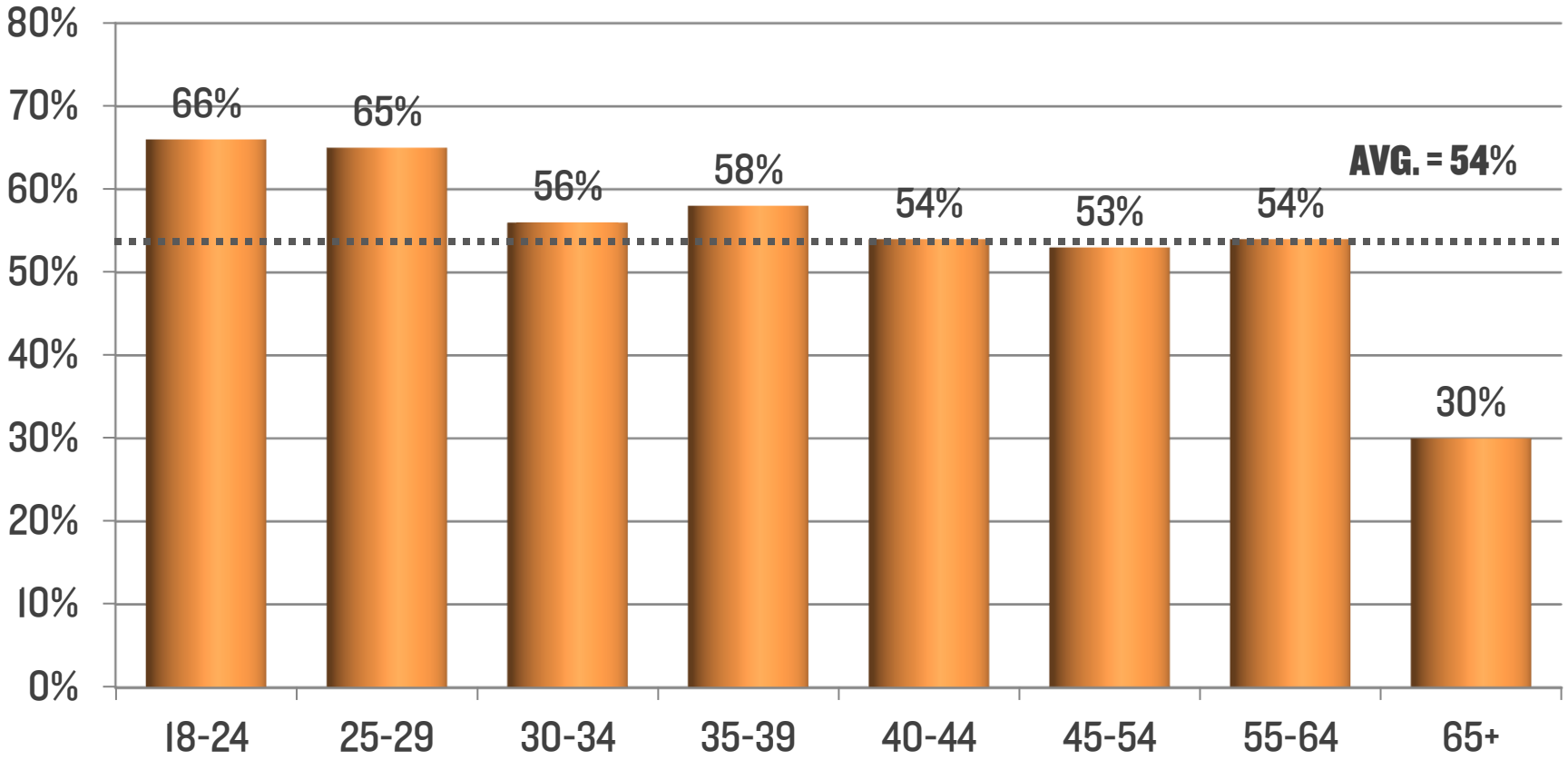
DINING DOWNTOWN IN LAST 6 MONTHS (BY INCOME)

When comparing 2013 to 2012, the biggest jump came from the $25-50K income range, which increased from 49% to 59% of those who say they have visited Downtown to dine.



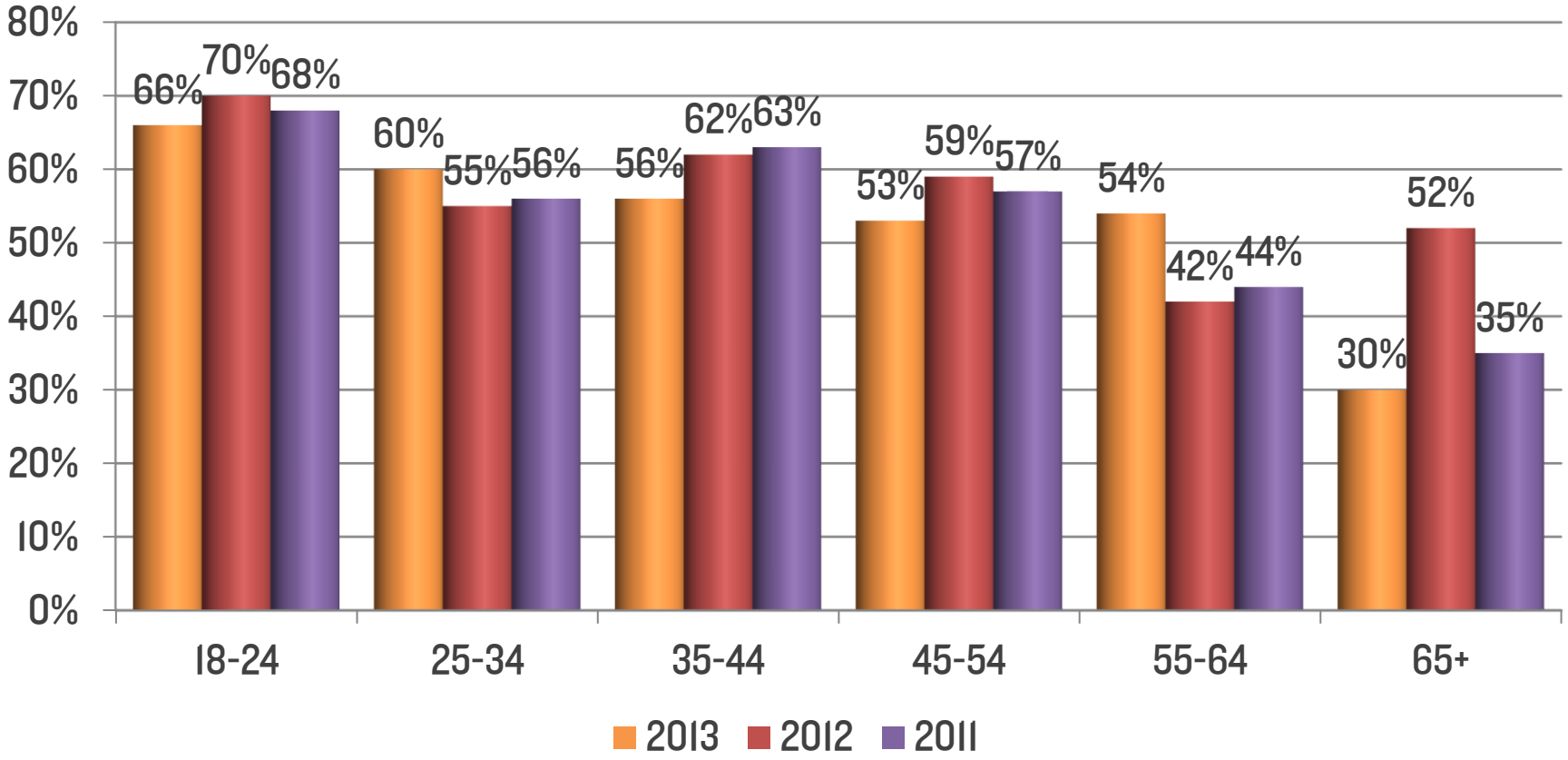
SHOPPING DOWNTOWN IN LAST 6 MONTHS (BY AGE)

Roughly two thirds (66.5%) of those aged 18 - 29 said they had shopped Downtown in the last six months. All other age groups were around the average of 54%, except for those 65+, of whom only 30% visited Downtown to shop in the last six months.



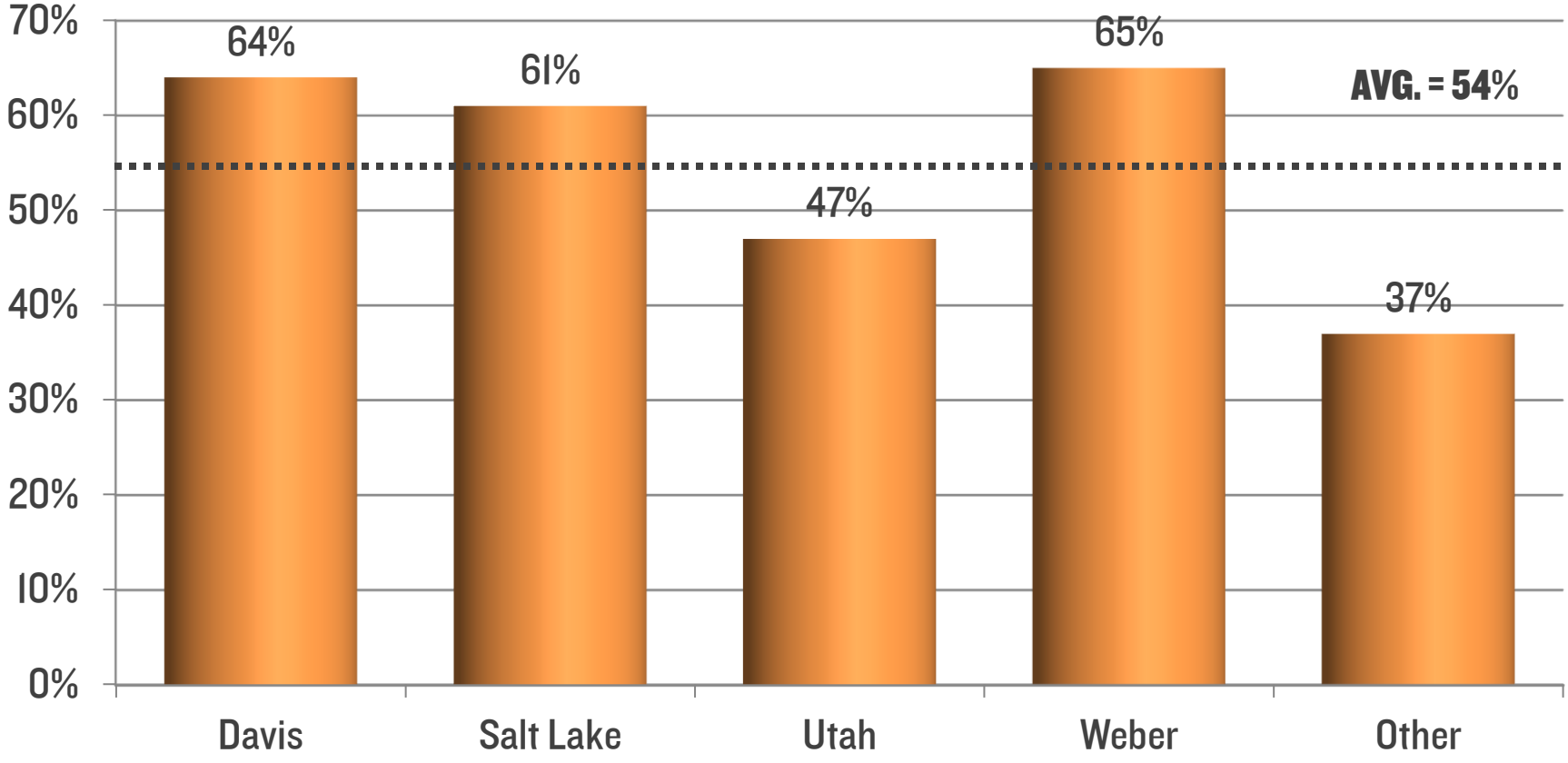
SHOPPING DOWNTOWN IN LAST 6 MONTHS (BY AGE)

2013 responses saw changes in all age groups compared to past years. 18 – 24 and 35 – 54 saw slight decreases, while those aged 65+ experienced a large decrease. This is somewhat surprising given the 55 – 64 age group experienced an above average increase. This may be due to changing shopping habits now that City Creek is established.



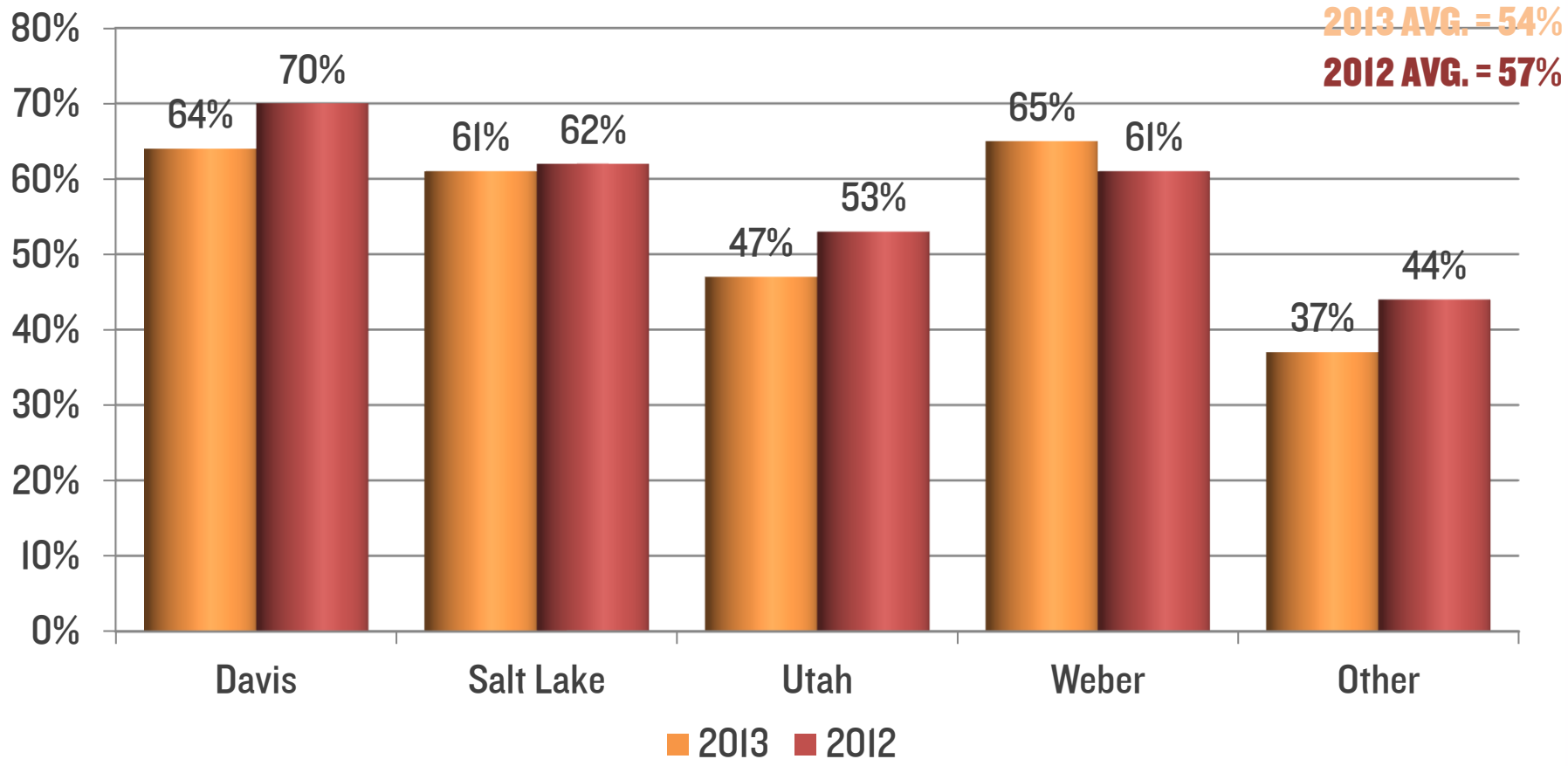
SHOPPING DOWNTOWN IN LAST 6 MONTHS (BY COUNTY)

Residents of Davis (64%), Salt Lake (61%), and Weber (65%) Counties were most likely to indicate they had shopped downtown Salt Lake at least once in the last six months. All three of these Counties were above the observed statewide baseline of 54%. 47% of Utah County residents surveyed said they had shopped Downtown.



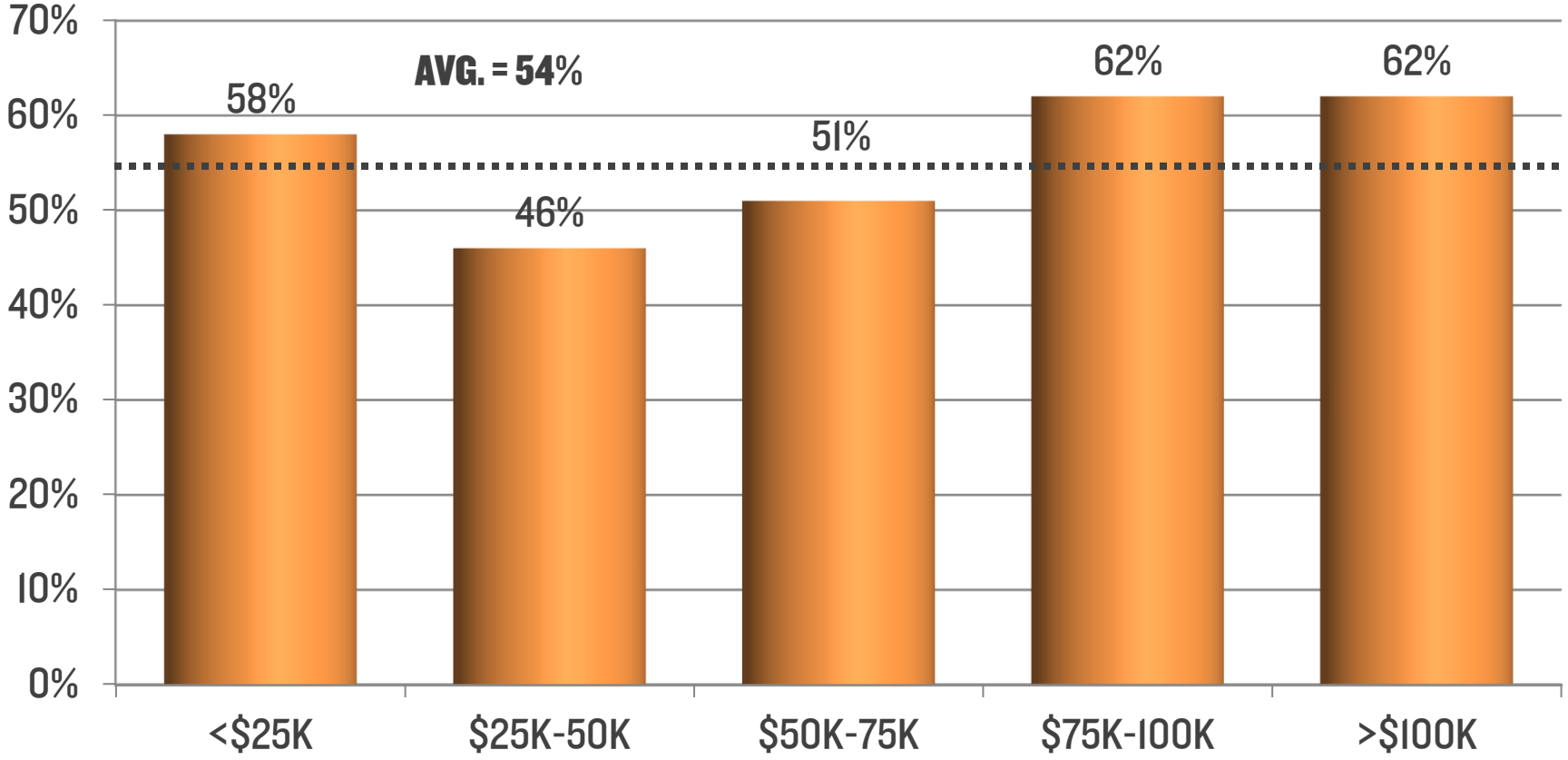
SHOPPING DOWNTOWN IN LAST 6 MONTHS (BY COUNTY)

Davis and Utah Counties (along with "Other") had much less visitation in 2013 compared to the same six month period in 2012. Salt Lake County had a slight decrease, while Weber County experienced an increase.



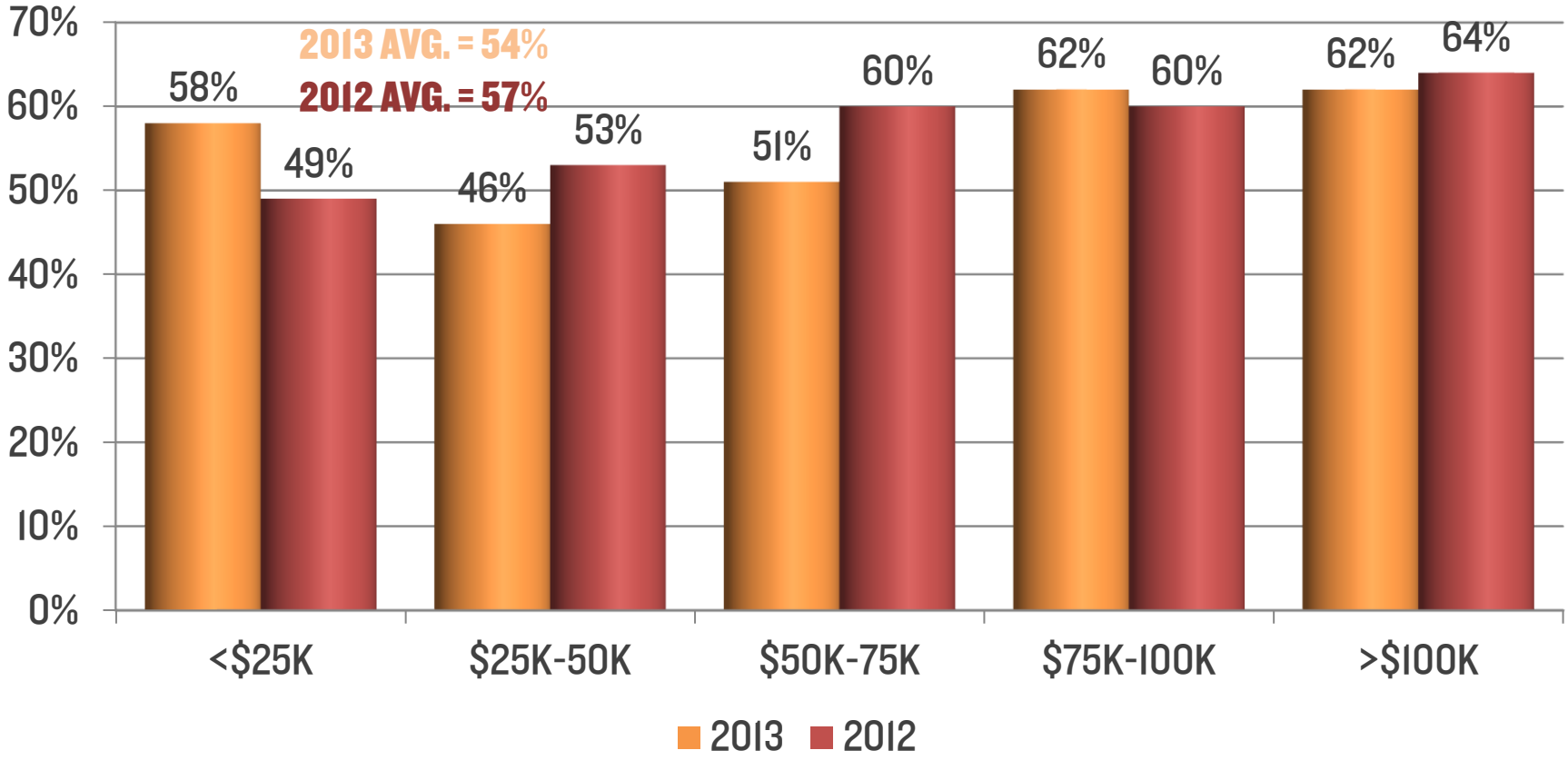
SHOPPING DOWNTOWN IN LAST 6 MONTHS (BY INCOME)

Respondents with annual household incomes of $25K or less and $75K or higher were most likely to indicate they had shopped Downtown at least once in the previous six months. The statewide baseline for Downtown shopping among all respondents in 2013 was 54%. Those with HHI of $25K-75K were well below the statewide average.



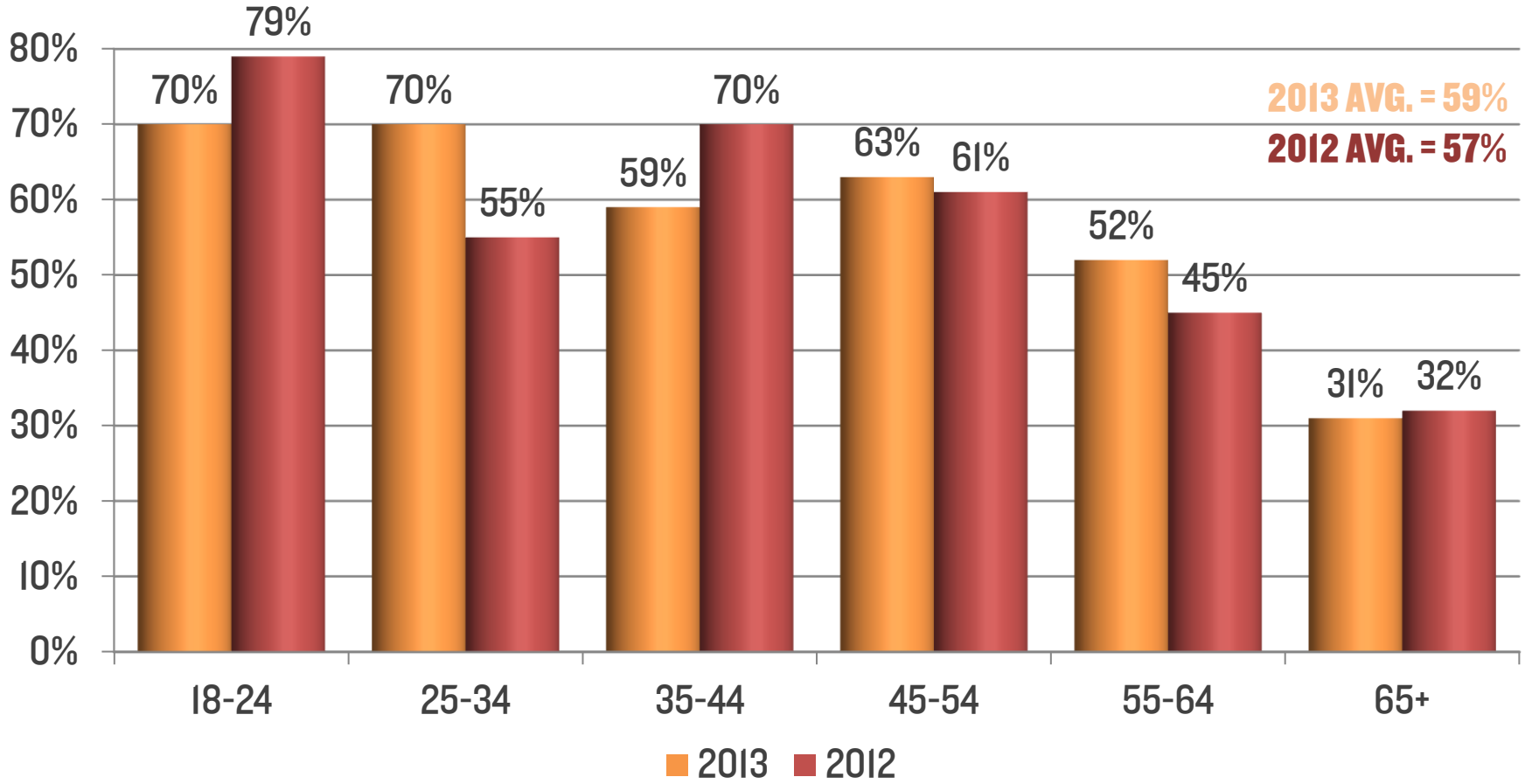
SHOPPING DOWNTOWN IN LAST 6 MONTHS (BY INCOME)

Respondents with annual household incomes of <$25K saw a large increase YOY, while those $25K-75K experienced a large decrease. This seems to show that shopping habits continue to change as Downtown evolves and there are distinct differences amongst HHI.



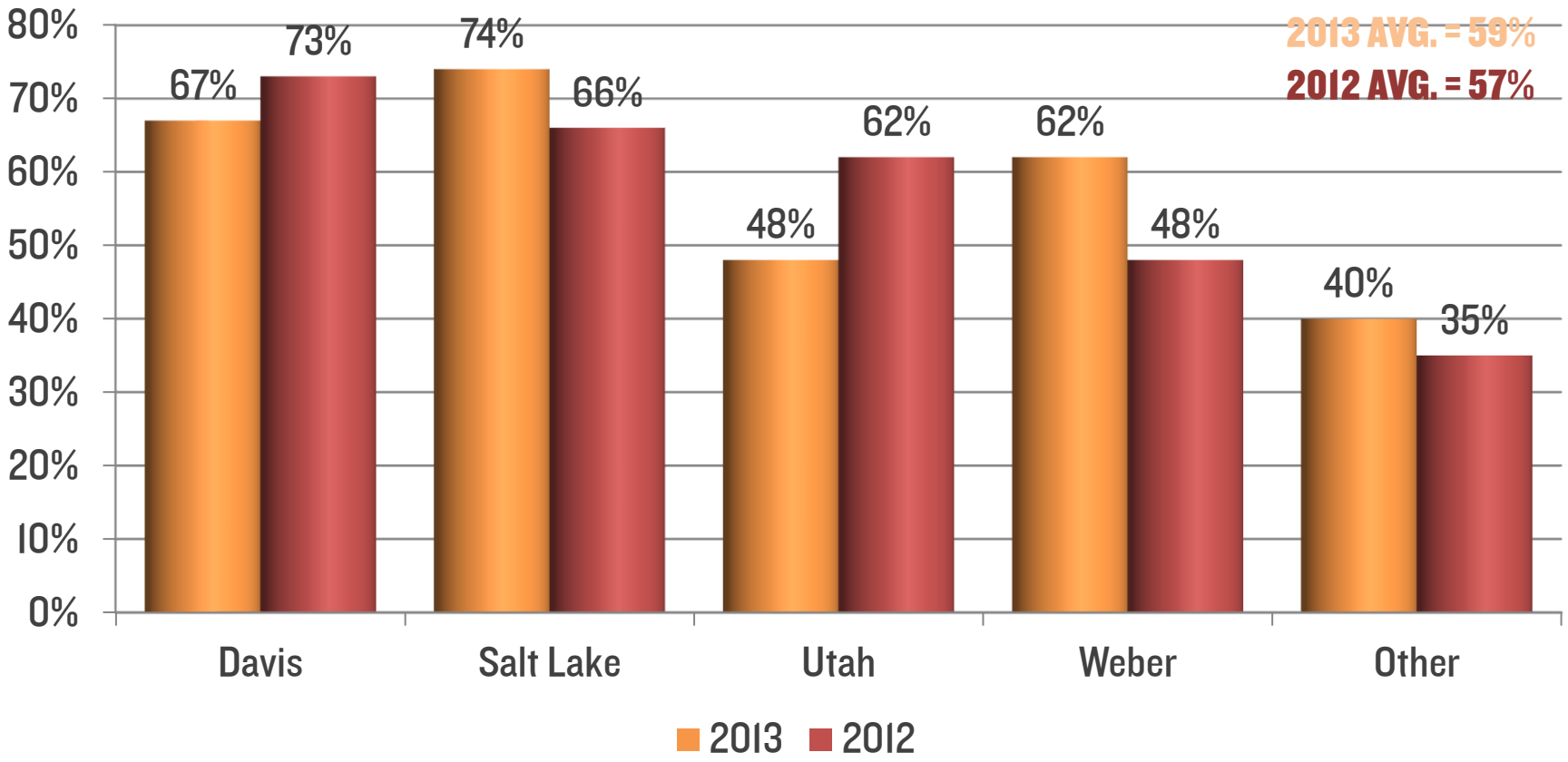
ENTERTAINMENT DOWNTOWN IN LAST 6 MONTHS (BY AGE)

Respondents aged 18 – 44 saw large YOY changes, both up and down: 18 – 24 and 35 – 44 saw large decreases, while 25 – 34 saw a large increase. Those aged 45 – 54 and 65+ saw marginal changes, while 55 – 65 also experienced an increase. 18 – 34 seem to have more similar habits in 2013, compared to 2012, as did 35 – 54.



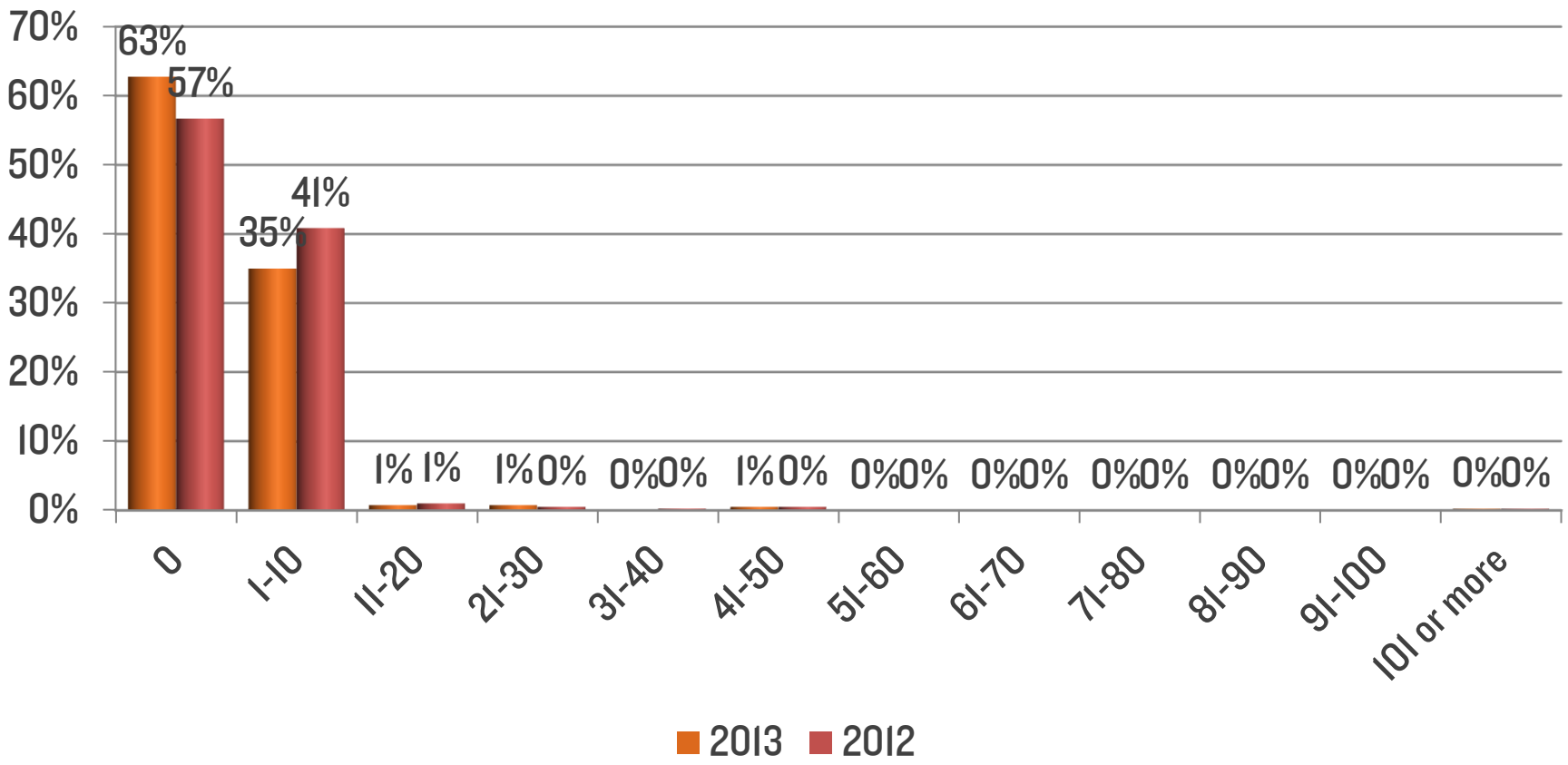
ENTERTAINMENT DOWNTOWN IN LAST 6 MONTHS (BY COUNTY)

There were significant YOY changes across all Counties in 2013. Davis and Salt Lake Counties had moderate decreases and increases, respectively. Utah County experienced a large decrease, while Weber County had a dramatic increase. Other Counties also experienced an increase. This seems to indicate that Salt Lake's Downtown is drawing slightly different groups over the past year.



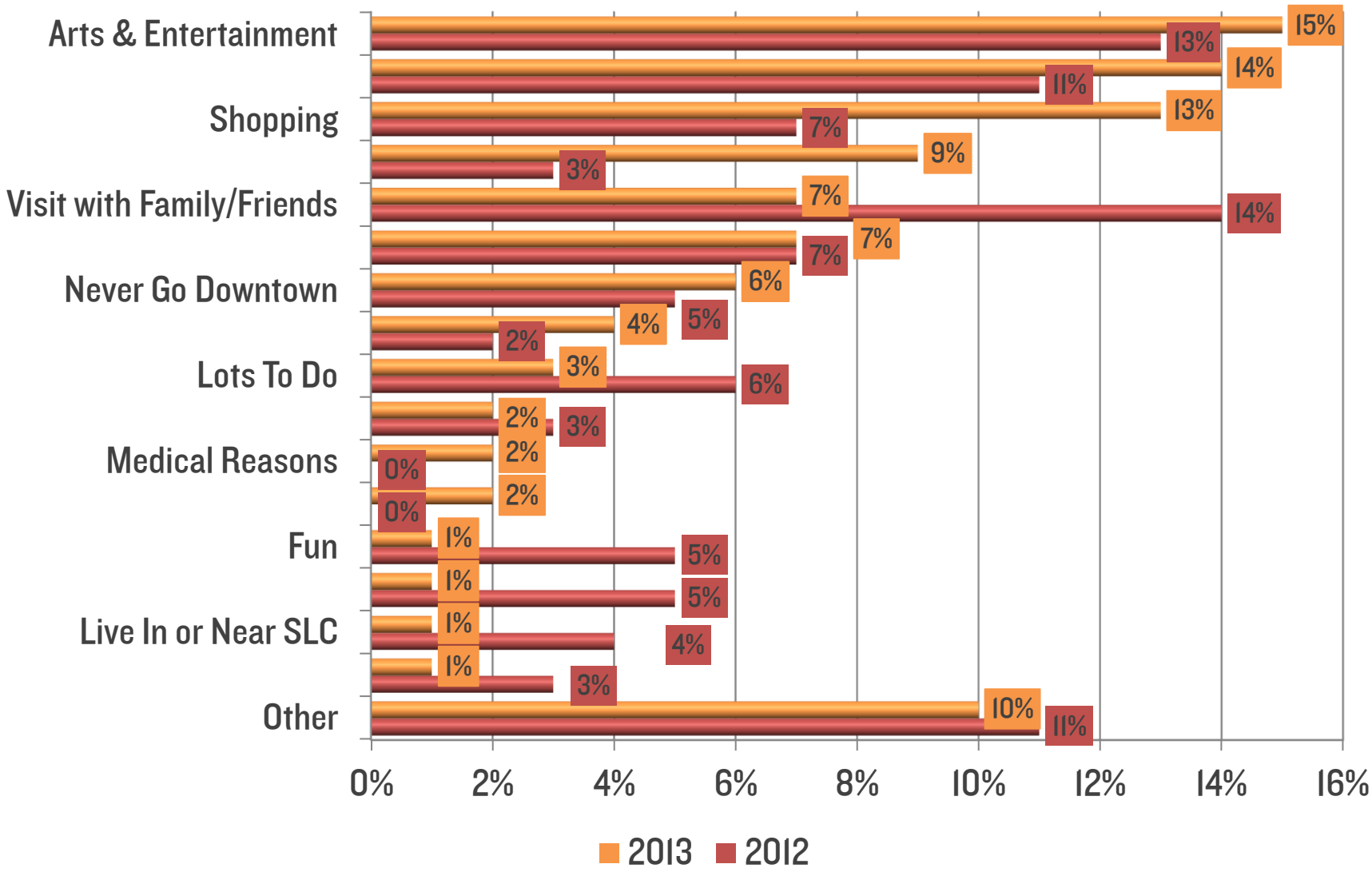
RELIGIOUS EVENTS DOWNTOWN IN LAST 6 MONTHS

Among respondents, there were much fewer visits Downtown for religious activities in the last six months for 2013 compared to the same time in 2012. Almost two-thirds of respondents never visited, while slightly more than a third (35%) visited 1 – 10 times.

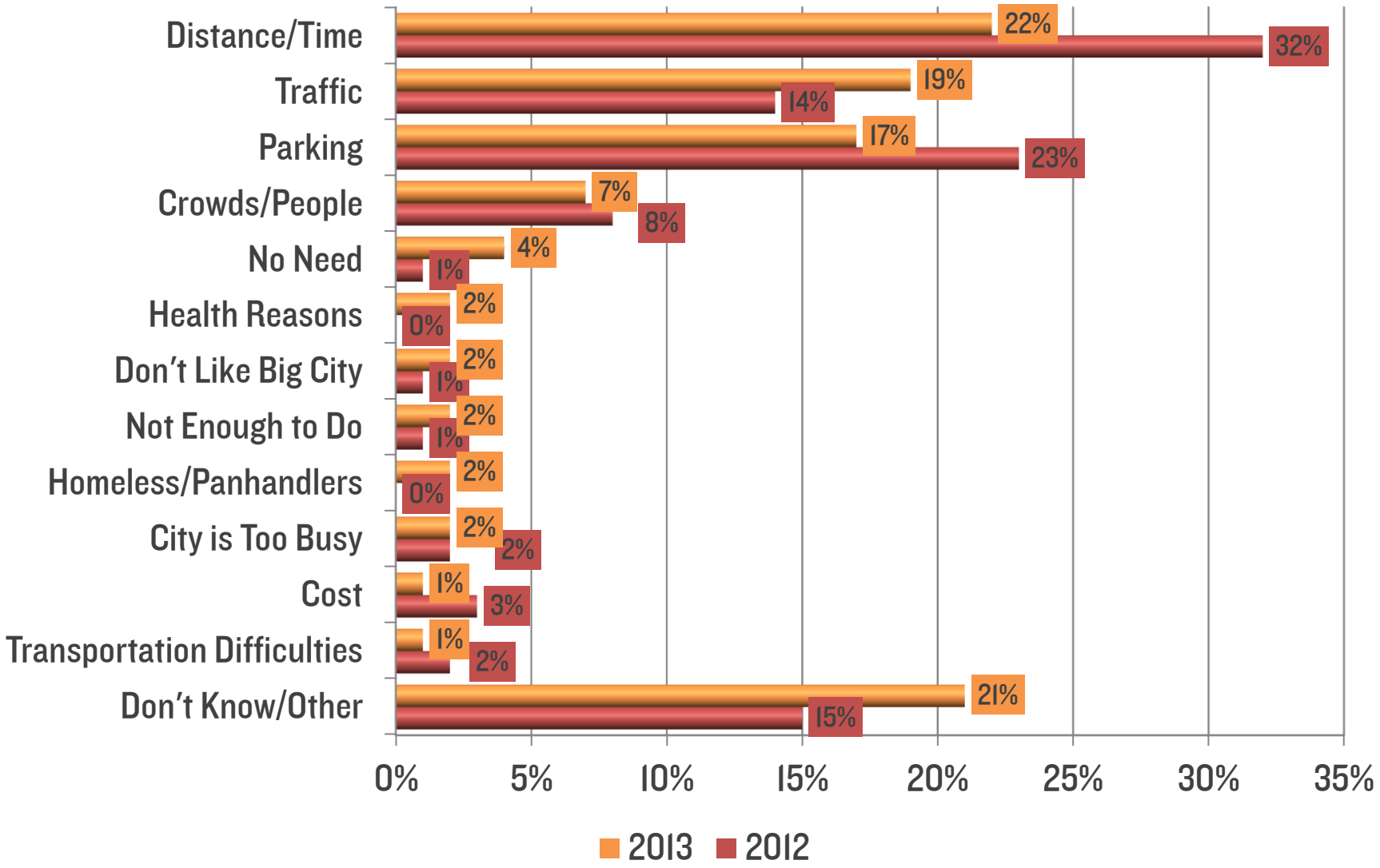


PERCEPTIONS OF DOWNTOWN

BIGGEST MOTIVATIONS/REASONS FOR COMING DOWNTOWN

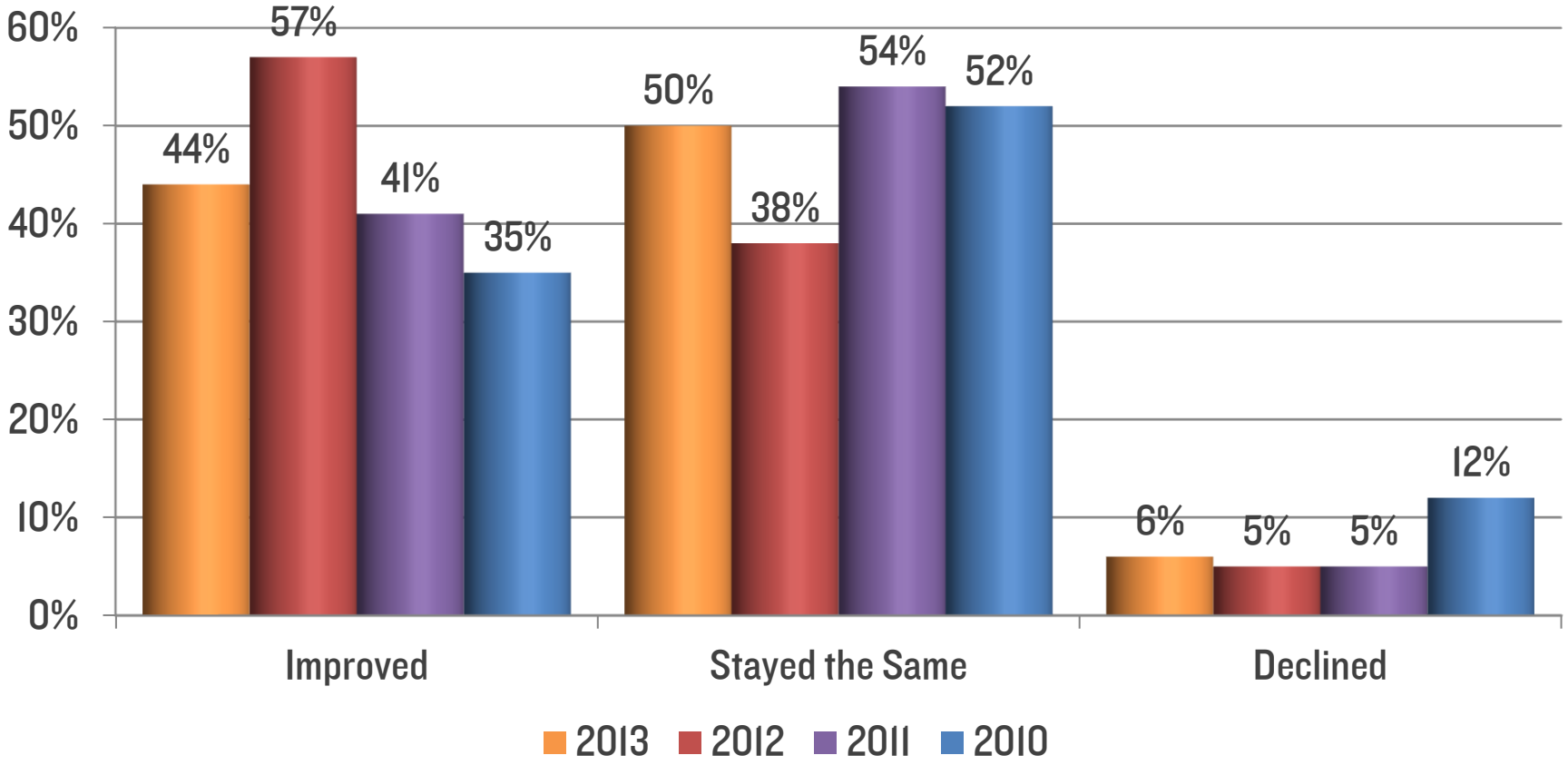


BIGGEST DETERRENTS/REASONS AGAINST COMING DOWNTOWN



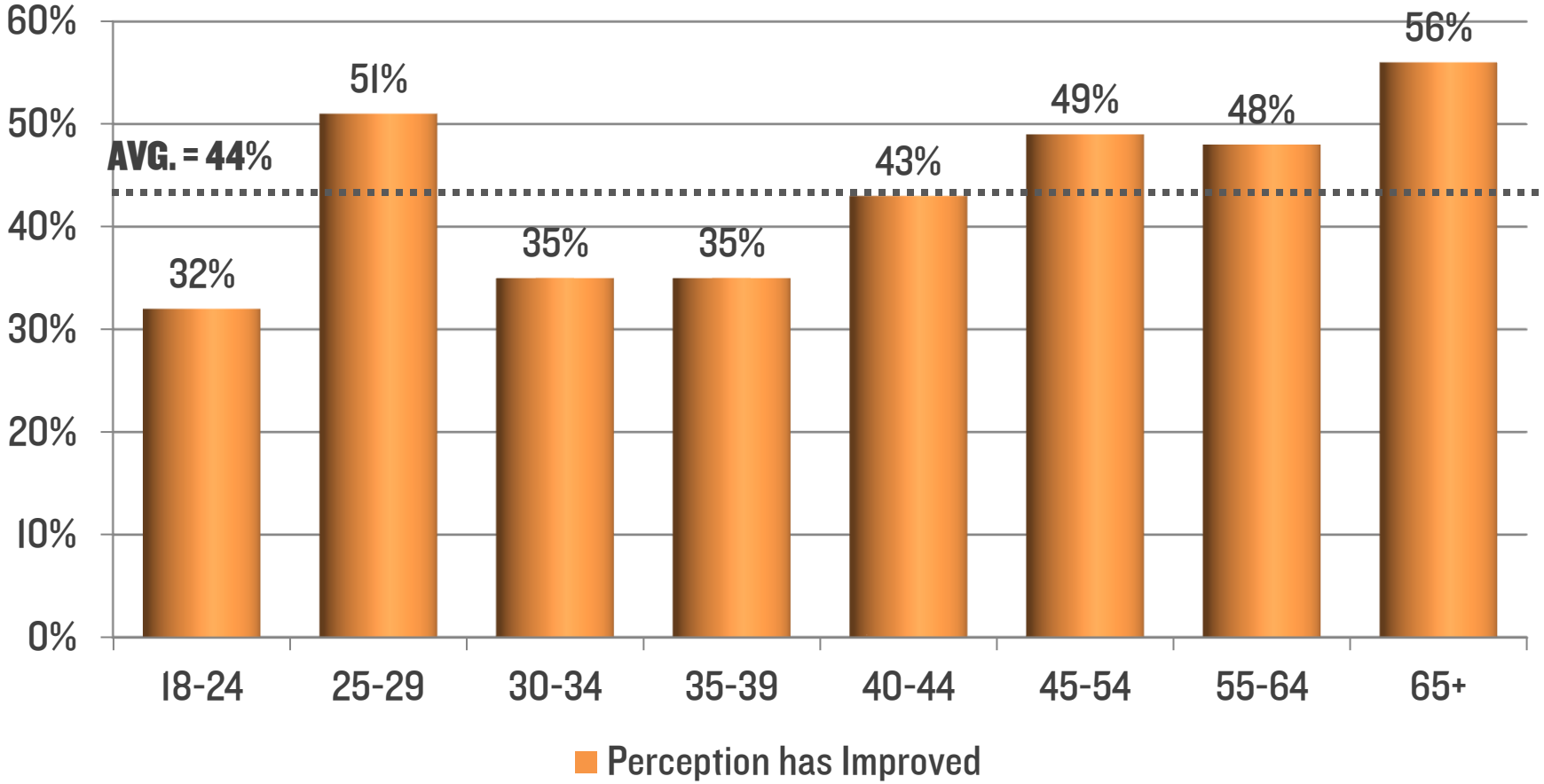
PERCEPTIONS OF DOWNTOWN SALT LAKE - YOY

After a positive spike in 2012, perceptions of Downtown fell in 2013 to 44% from 57%, in saying their perceptions improved. However, a very small percentage (6%) feel their perception of Downtown declined in 2013, with half feeling their perception stayed the same.



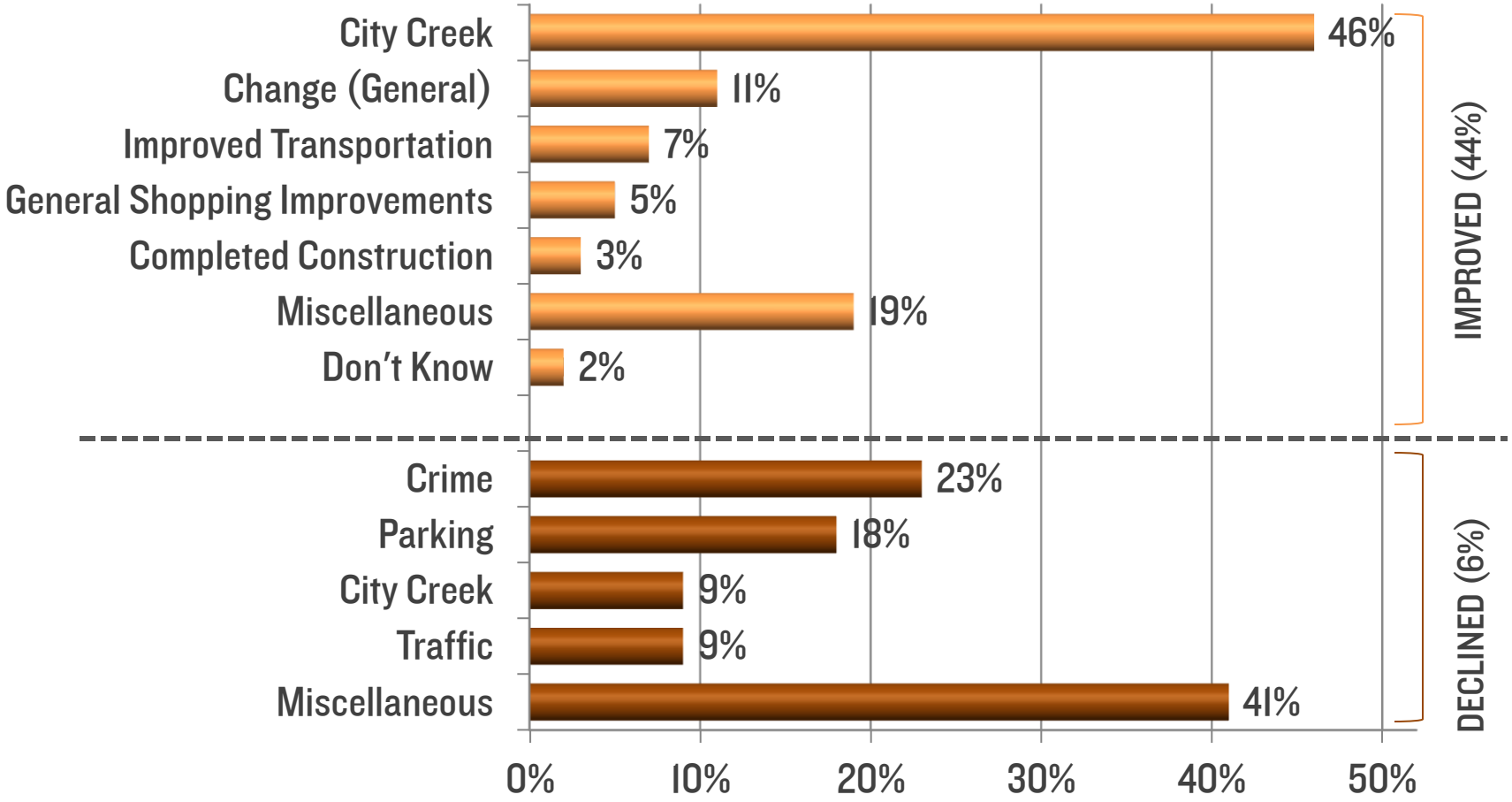
PERCEPTIONS DOWNTOWN HAS IMPROVED (BY AGE)

Contrary to 2012, perceptions that Downtown has "improved" seemed to skew slightly toward the older crowd in 2013, with those 65+ having the most positive outlook while the 18-24 crowd had the least positive. It should be noted that a perceived "decrease" in Downtown was small and evenly dispersed across age groups.

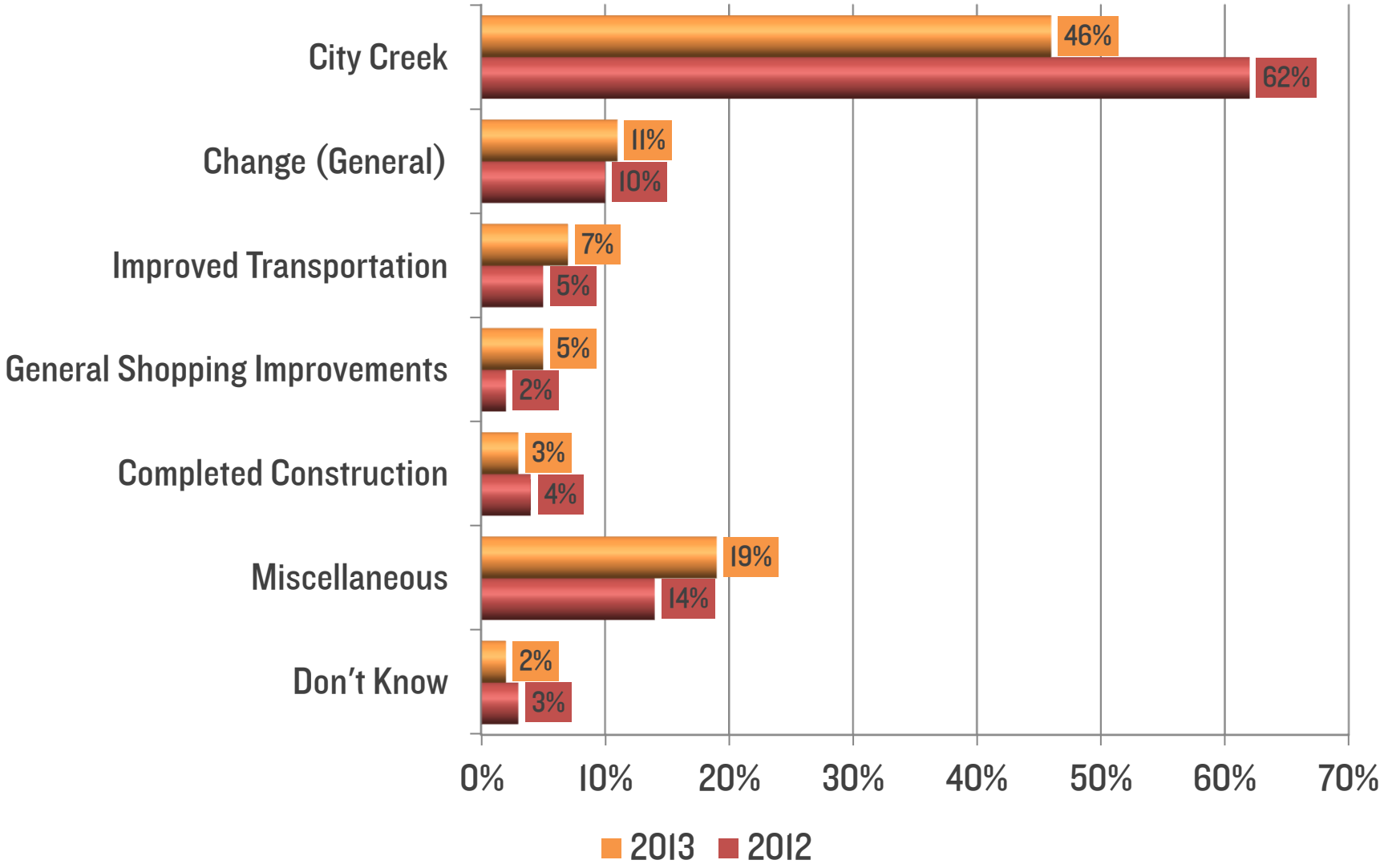


IMPACTING PERCEPTIONS OF DOWNTOWN SALT LAKE

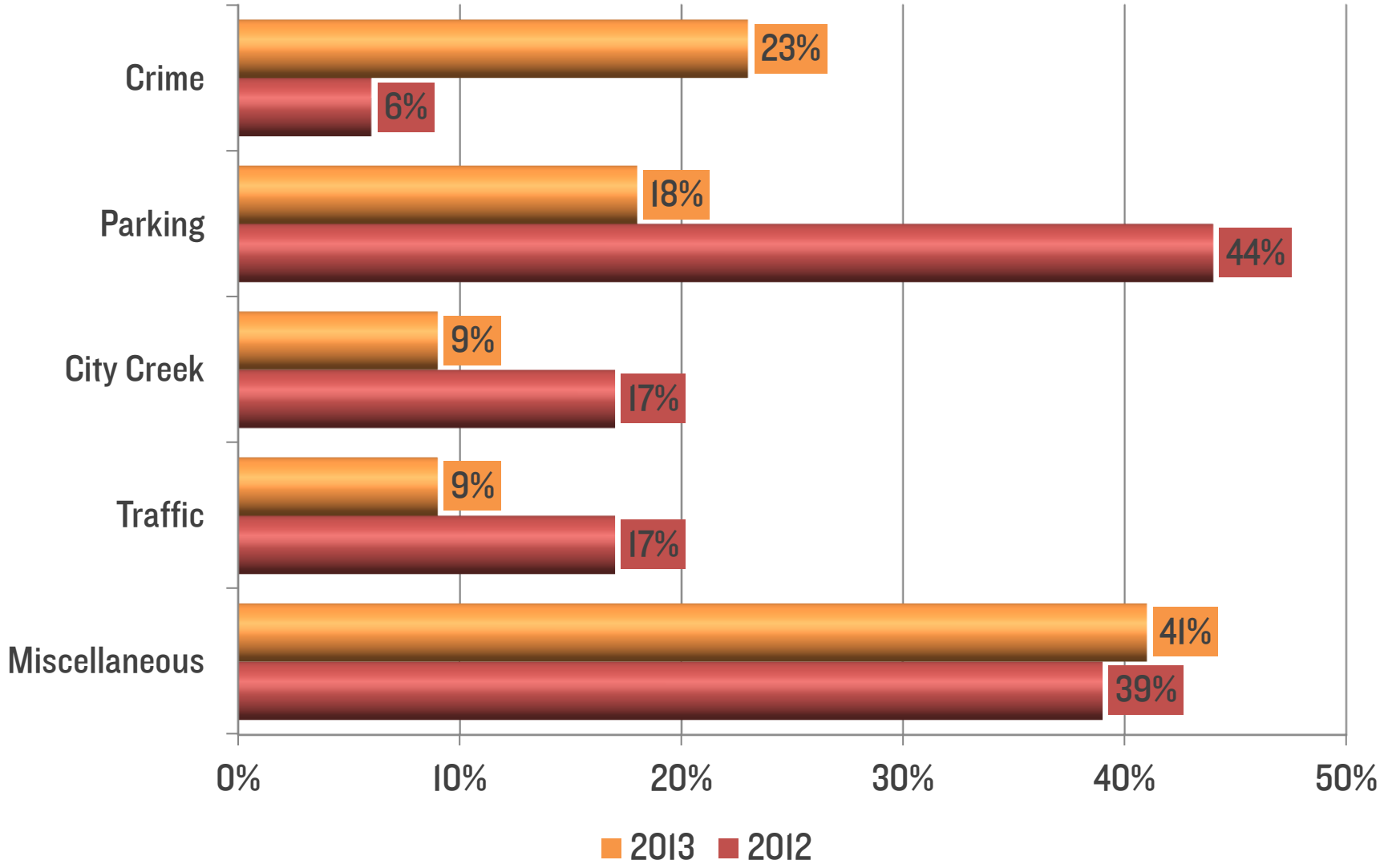
Among those who said their perception of Downtown Salt Lake had "improved", which represented 44% of all respondents, City Creek was the most frequently cited factor for the second straight year. The specific reasons perceptions of Downtown had "declined" are more dispersed.



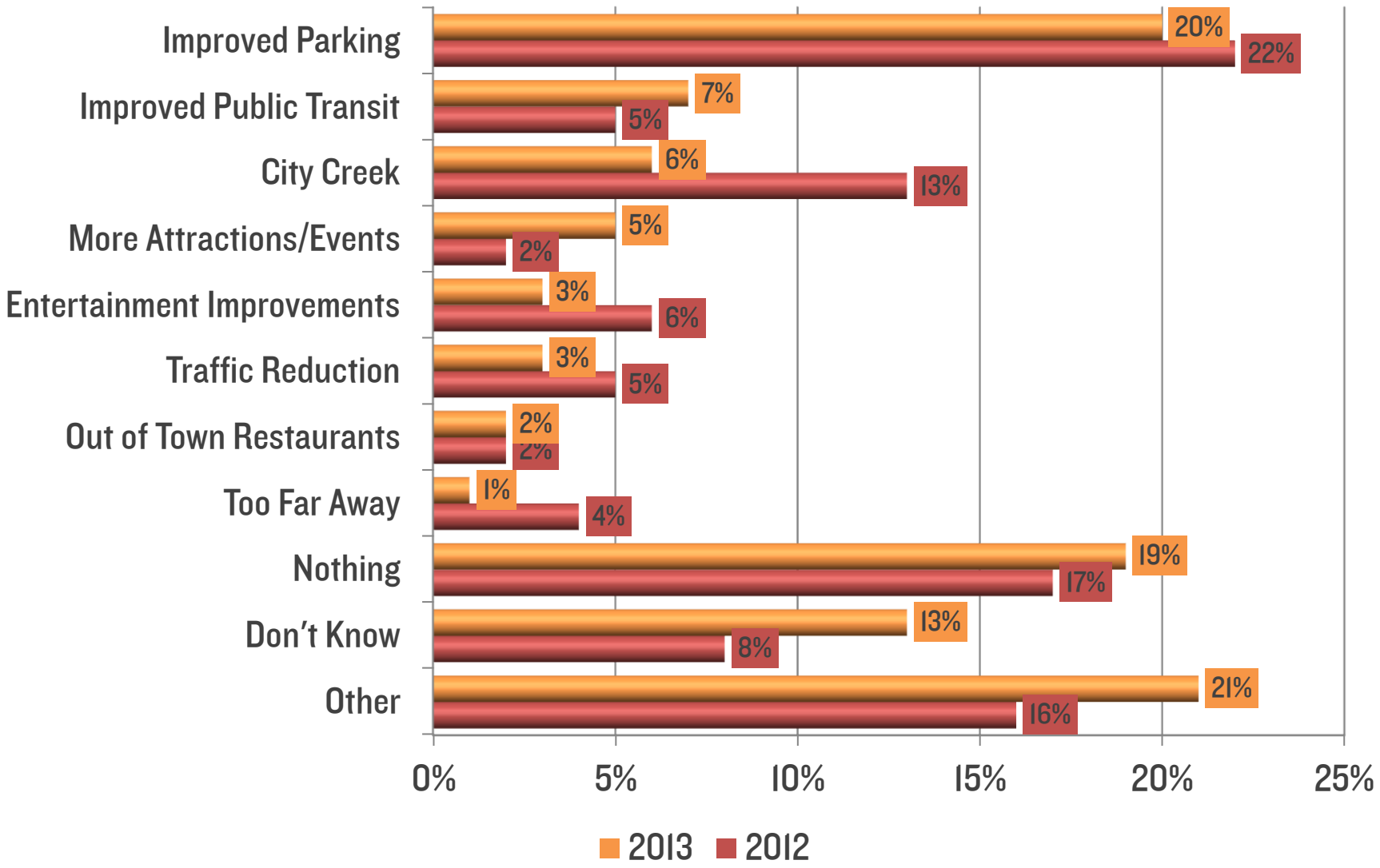
PERCEPTIONS OF WHY THINGS IMPROVED - YOY



PERCEPTIONS OF WHY THINGS HAVE GOTTEN WORSE - YOY

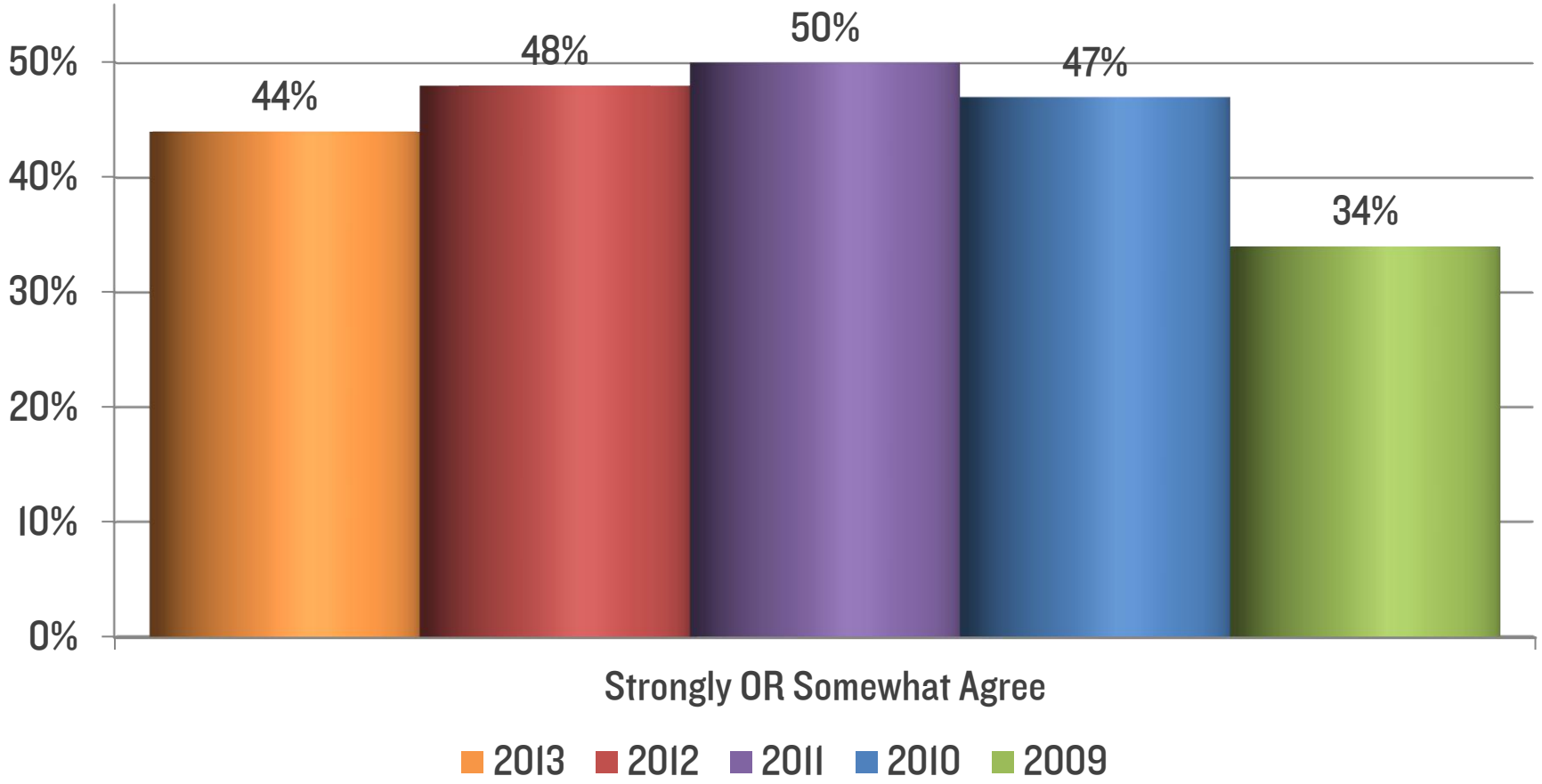


WHAT WOULD MAKE YOU COME DOWNTOWN MORE OFTEN?- YOY

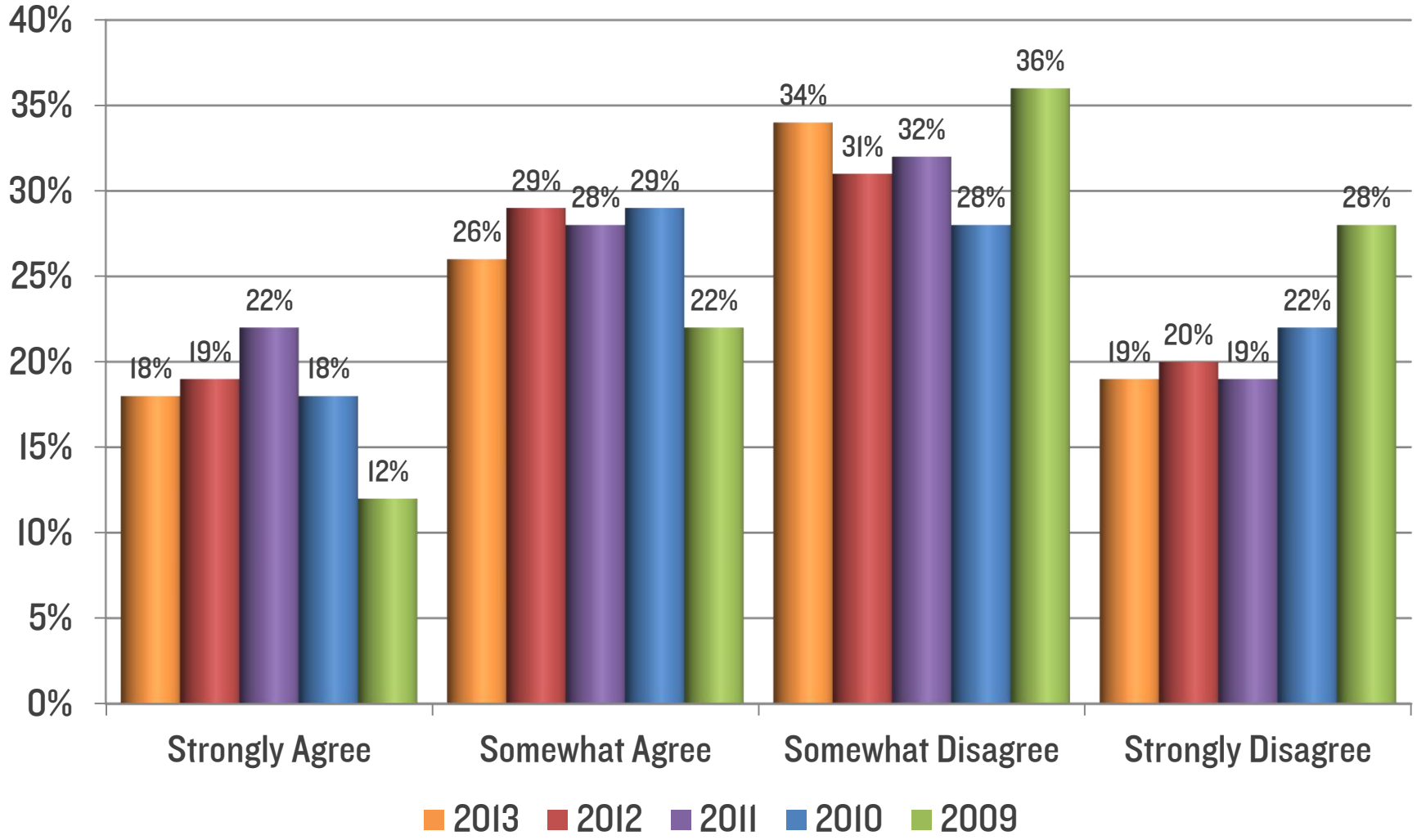


OWNERSHIP & CONNECTION WITH DOWNTOWN SALT LAKE

44% of respondents said they either "strongly" or "somewhat agreed" they felt a sense of ownership and connection with Downtown Salt Lake. This is down slightly from the previous two years, but within the margin of error.

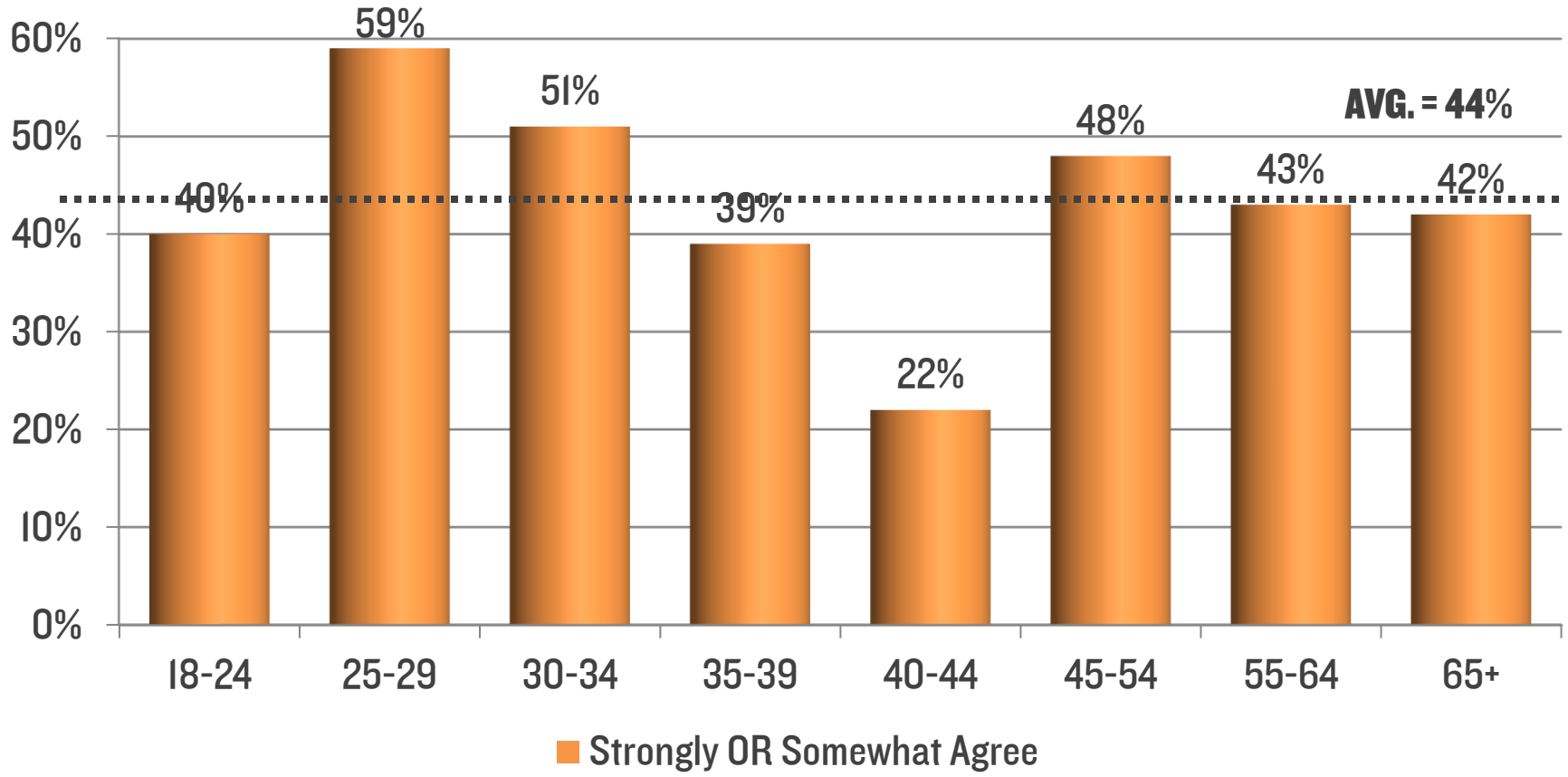


OWNERSHIP & CONNECTION WITH DOWNTOWN SALT LAKE



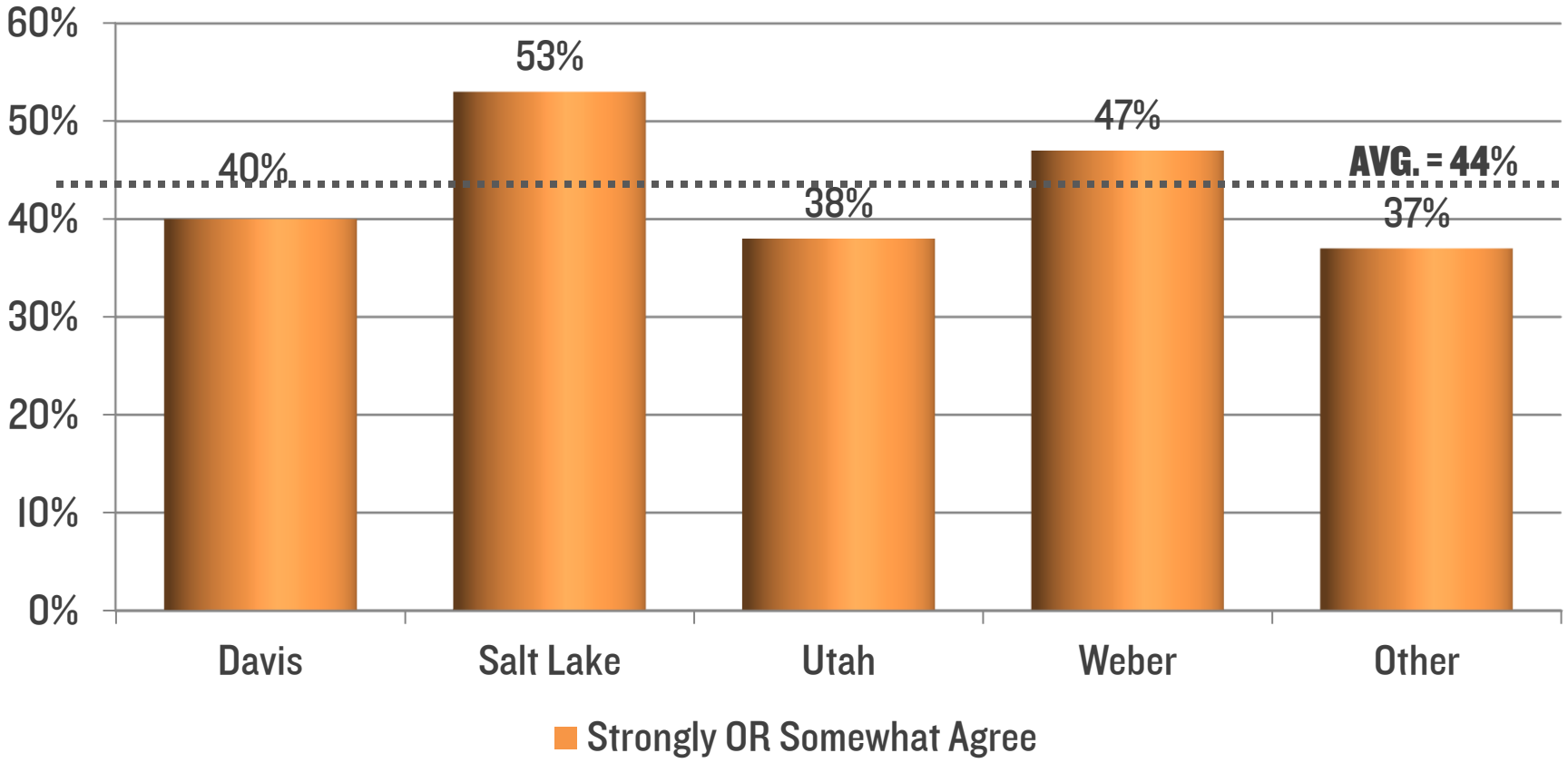
OWNERSHIP & CONNECTION WITH DOWNTOWN (BY AGE)

Respondents between the ages of 25 – 34 seemed to have the greatest sense of "ownership and connection" associated with Downtown (55%). This contrasted with respondents between the ages of 35 – 44, only 30% of whom agreed with the statement, well below the reported average of 44%.

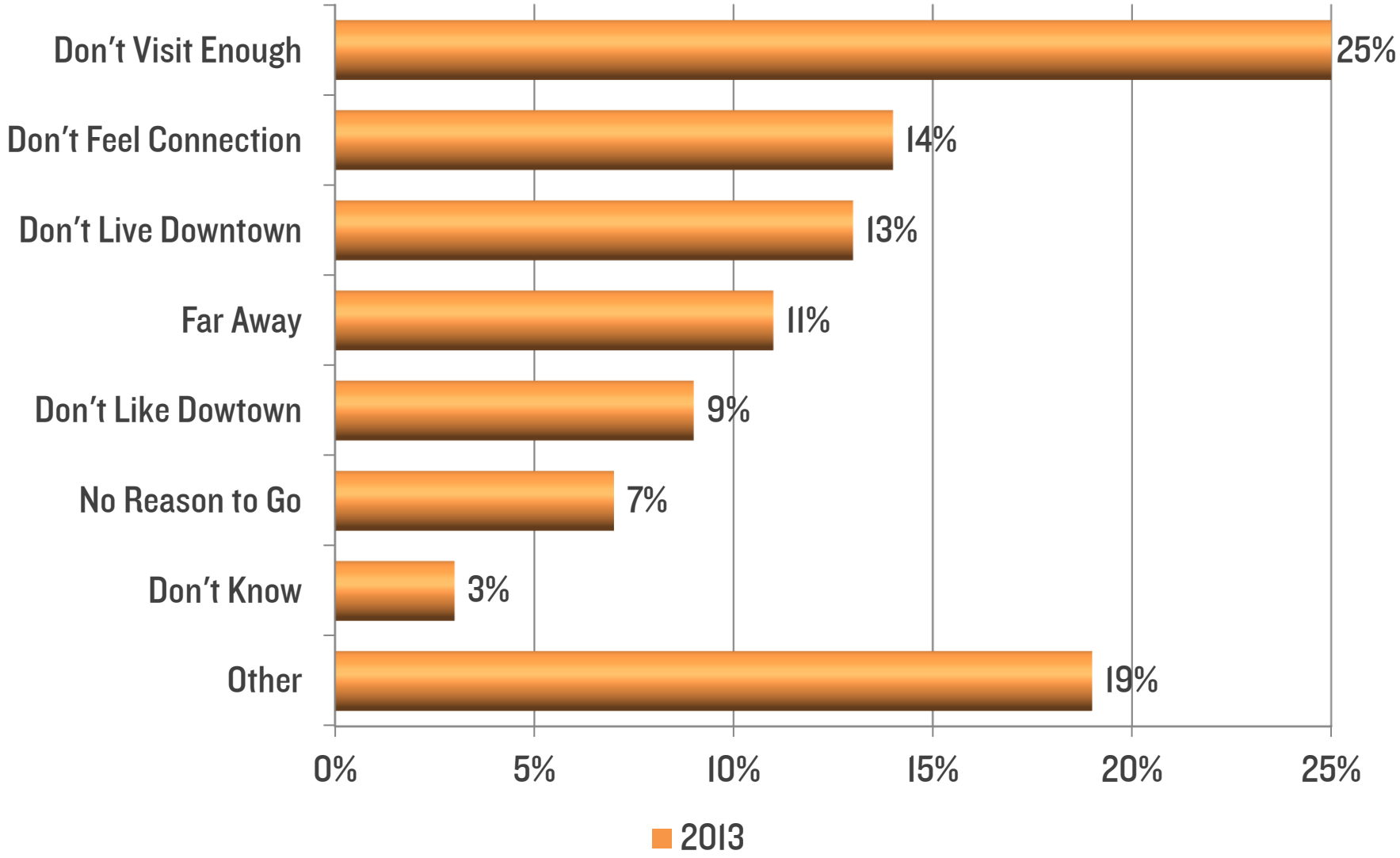


OWNERSHIP & CONNECTION WITH DOWNTOWN (BY COUNTY)

As should be expected, Salt Lake County had the highest percentage of respondents who felt "ownership and connection" in 2013 at 53%. Surprisingly, Weber was the other County in which respondents agreed with the statement with a higher frequency than the state average.

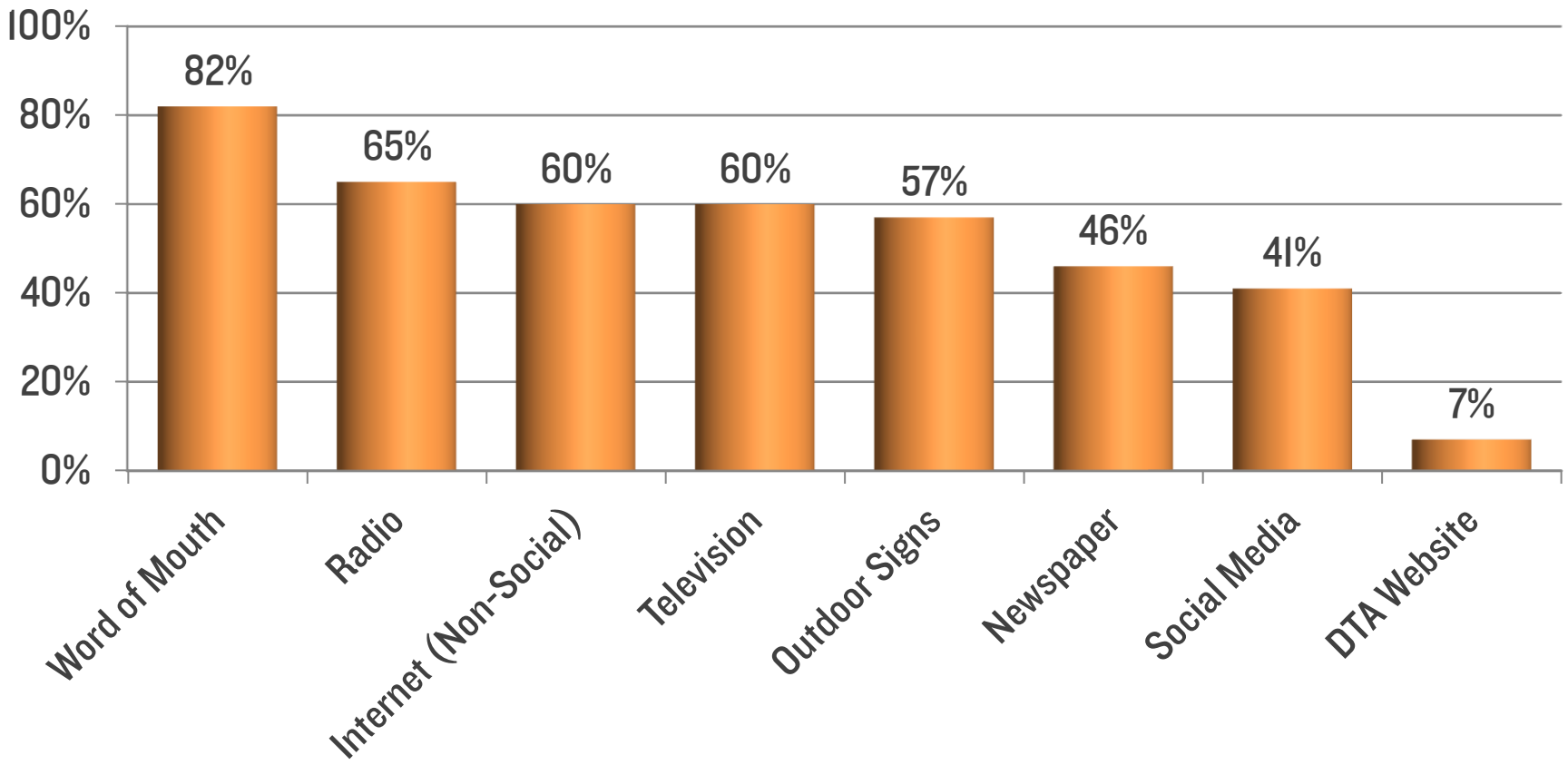


WHY DON'T YOU FEEL OWNERSHIP/CONNECTION WITH DOWNTOWN SALT LAKE?



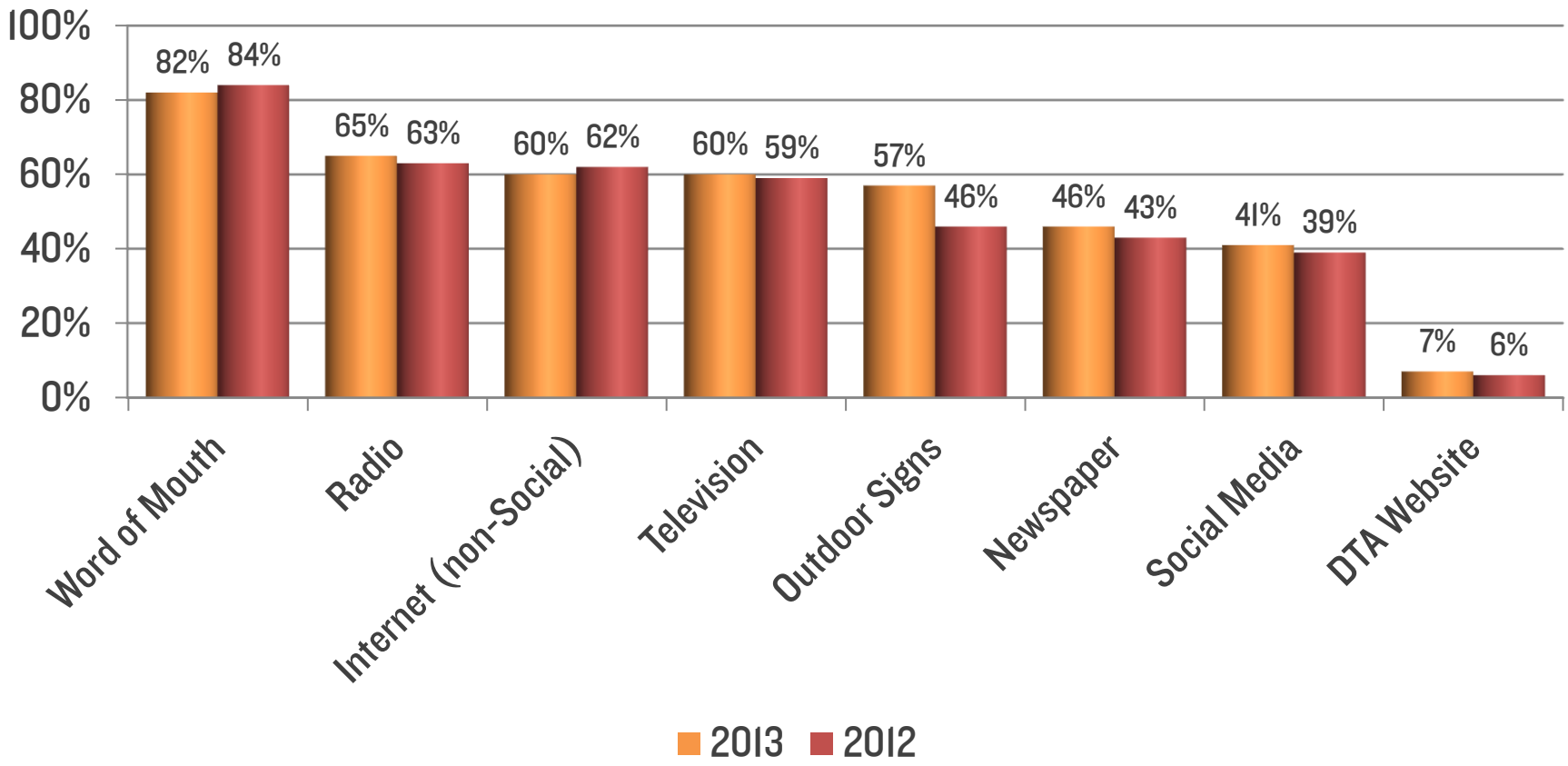
INFORMATION SOURCES ABOUT DOWNTOWN

When asked where they get information about Downtown events, shopping, restaurants, etc., 82% of respondents cited "word of mouth" followed by "radio" (65%) and "non-social internet" (60%). The Downtown Alliance website was mentioned by 7% of respondents.



INFORMATION SOURCES ABOUT DOWNTOWN - YOY

When compared to 2012, information sources saw very little fluctuation in 2013. "Outdoor Signs" is the one response that had a rate-increase in 2013 (+11%) higher than the margin of error.



INFORMATION SOURCES ABOUT DOWNTOWN

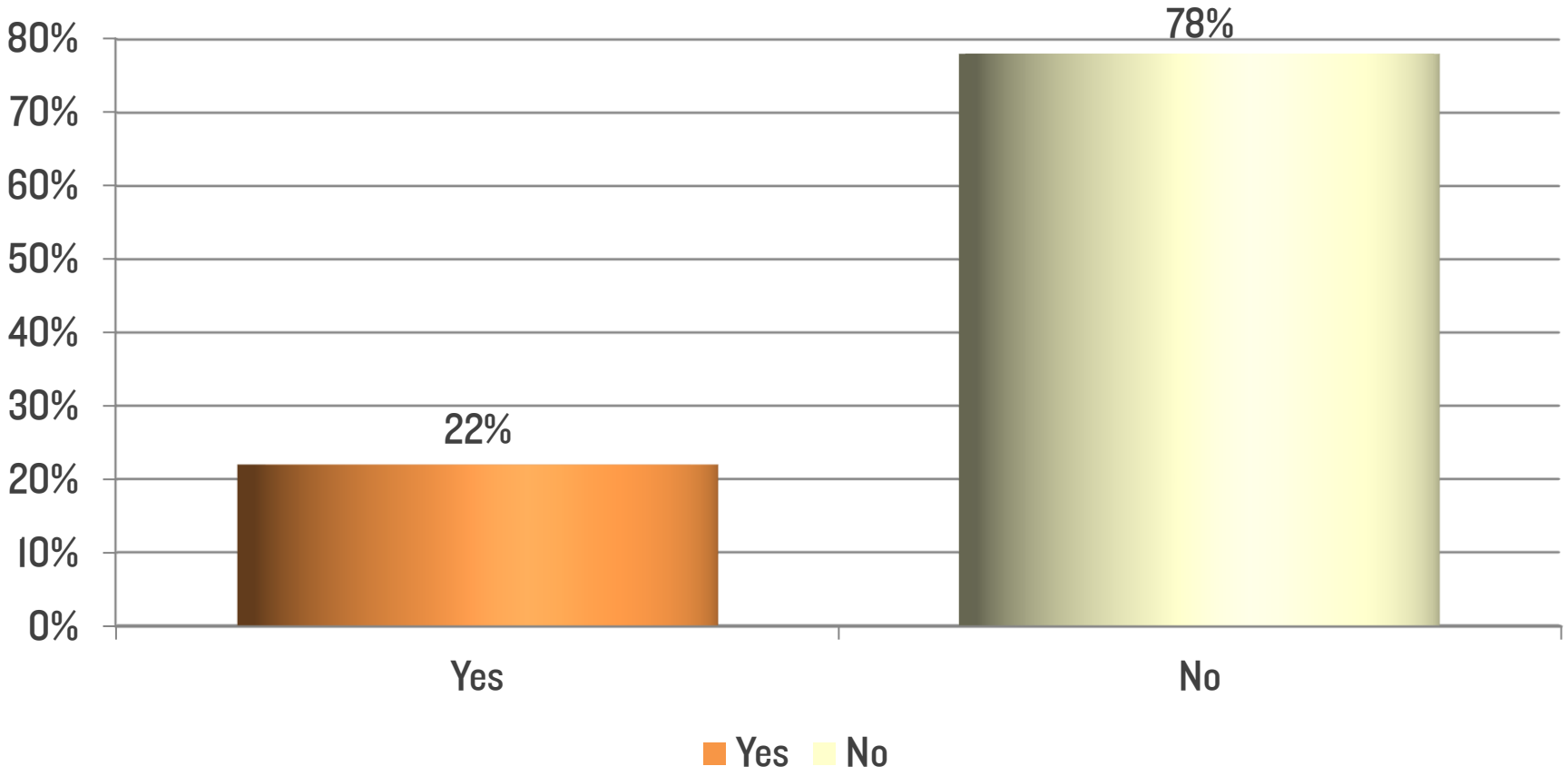
The chart below breaks out the percentage within each age group that said they do get information about Downtown from each of the sources specified. Highlighted cells indicate statistically significant differences, with orange being significantly higher and yellow being significantly lower. Younger respondents are much more likely to get their info online, while older ages rely more on TV and newspaper.

	18-24	25-29	30-34	35-39	40-44	45-54	55-64	65+
DTA Website	6%	4%	11%	3%	6%	7%	6%	8%
Email	15%	27%	20%	19%	23%	23%	22%	11%
Internet (non-social)	66%	78%	80%	55%	51%	64%	57%	22%
Newspaper	28%	39%	36%	42%	49%	48%	50%	72%
Outdoor signs	60%	65%	60%	61%	63%	62%	65%	26%
Radio	51%	71%	75%	58%	69%	77%	67%	50%
Social media	62%	65%	49%	39%	34%	46%	19%	13%
Television	30%	45%	53%	52%	66%	75%	74%	78%
Word of Mouth	85%	92%	82%	84%	80%	84%	85%	65%

LIVING DOWNTOWN

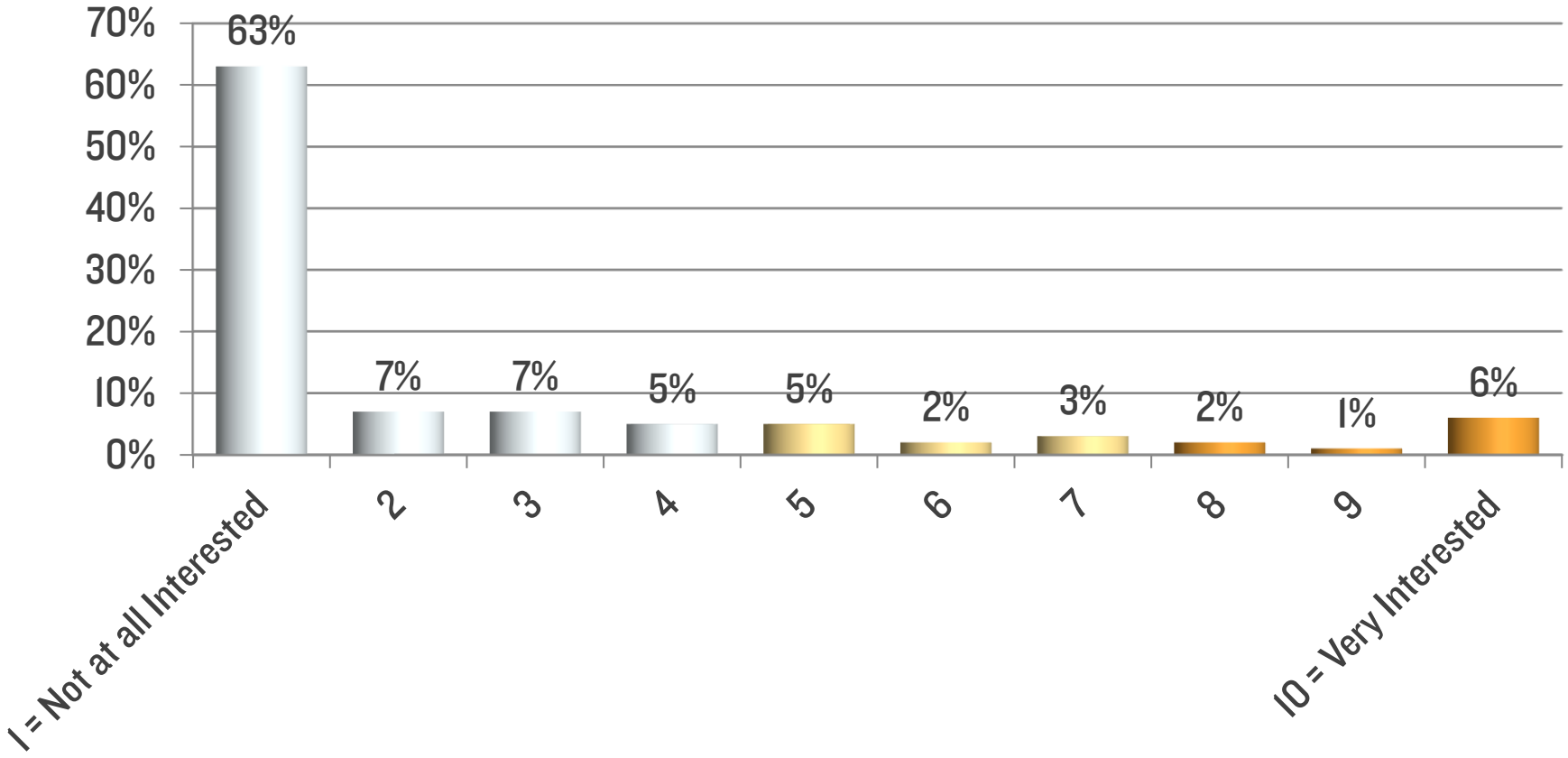
WOULD YOU CONSIDER LIVING DOWNTOWN?

Of those who do not already live there (8 respondents), nearly 4 in 5 (78%) respondents said they would NOT consider living Downtown.



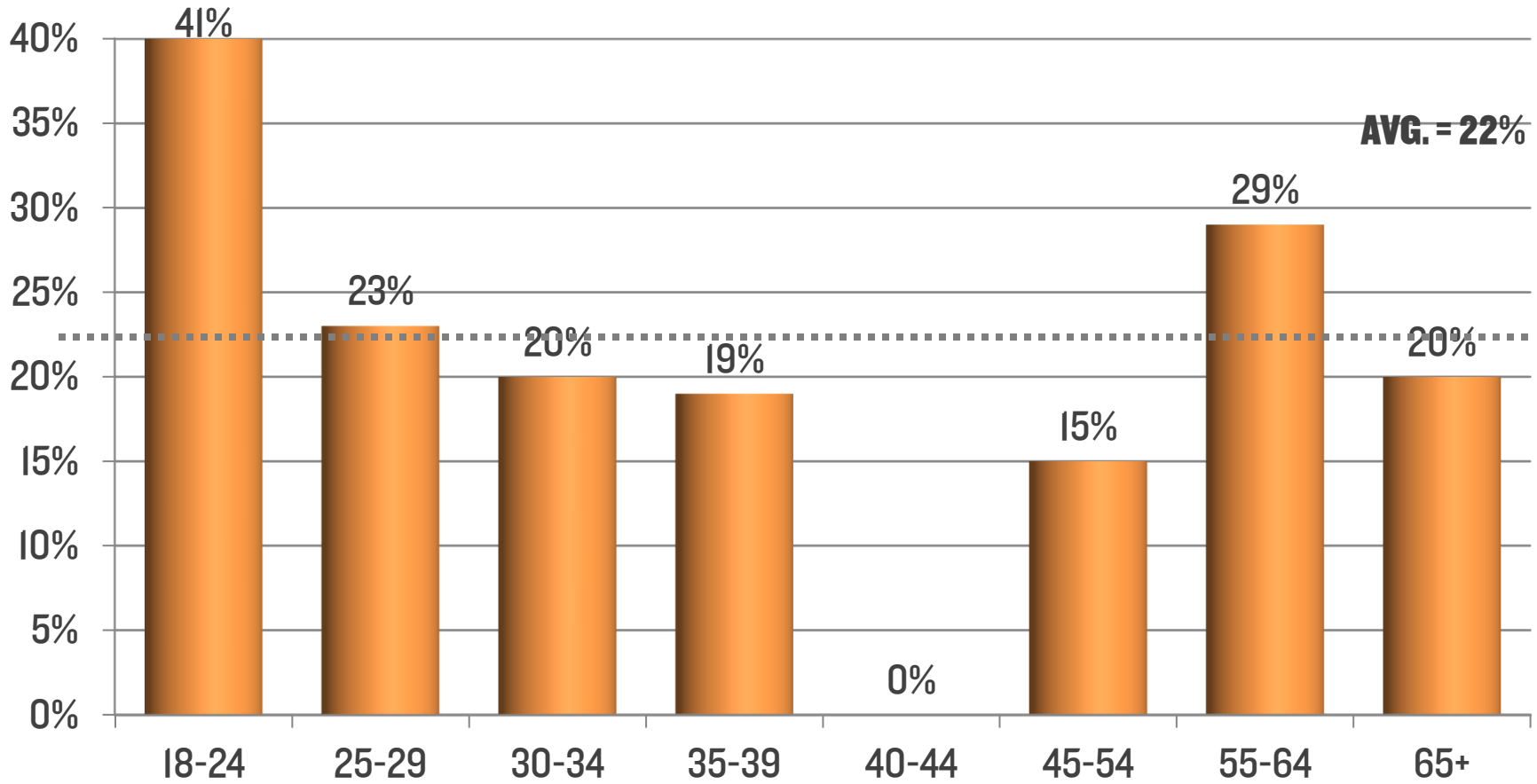
INTEREST IN LIVING DOWNTOWN SALT LAKE

Roughly 1 in 10 respondents (9%) indicated an 8, 9 or 10 for being very interested in living in Downtown Salt Lake. Four in five respondents (82%) had very low interest, with almost two-thirds (63%) not having any interest. Overall, there was very low interest in living Downtown amongst respondents. Also, no single age was more or less interested in living Downtown when cross tabbed by age.



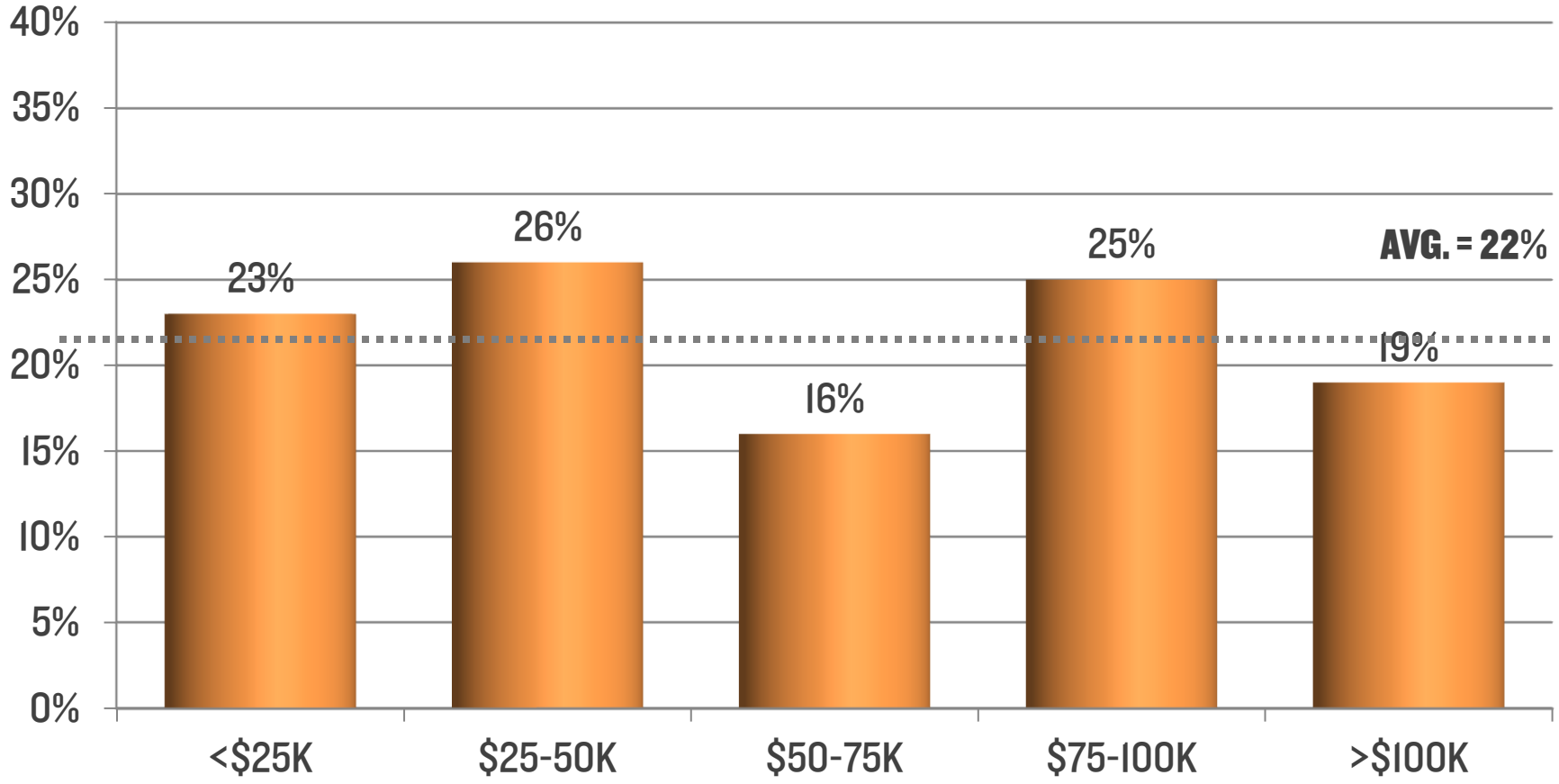
WOULD YOU CONSIDER LIVING DOWNTOWN? (BY AGE)

Respondents aged 18 - 24 had the most interest (41%) in living Downtown. The next age group with the highest interest (31%) were those aged 55 - 64. All other age groups were at or below the statewide average of 22%.



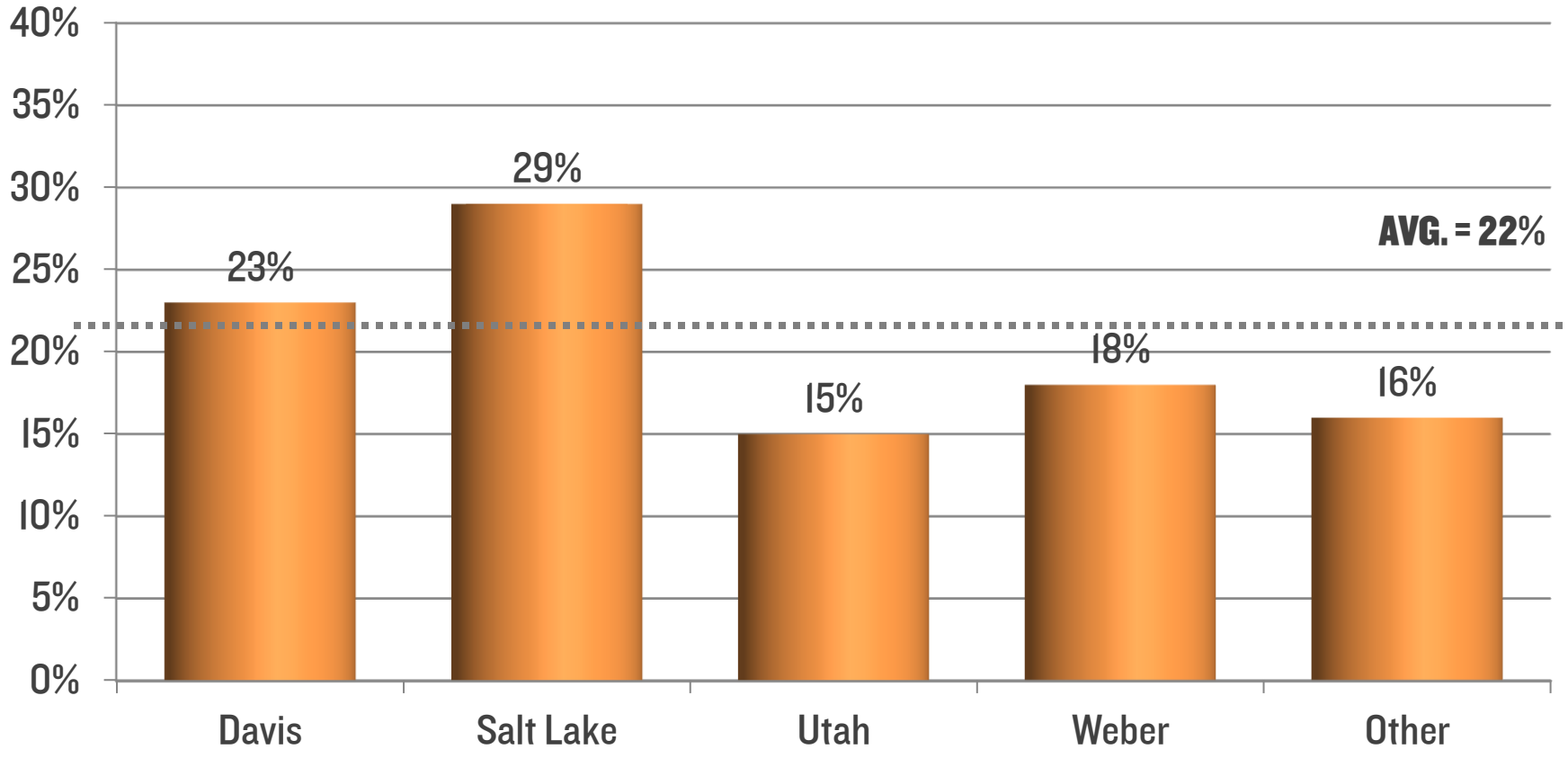
WOULD YOU CONSIDER LIVING DOWNTOWN? (BY INCOME)

Household income had a less dramatic variation than age, with those making < $25K - 50K or $75K - 100K being slightly above the statewide average of 22%. Those with a HHI of $50K - 70K or > $100K were under.



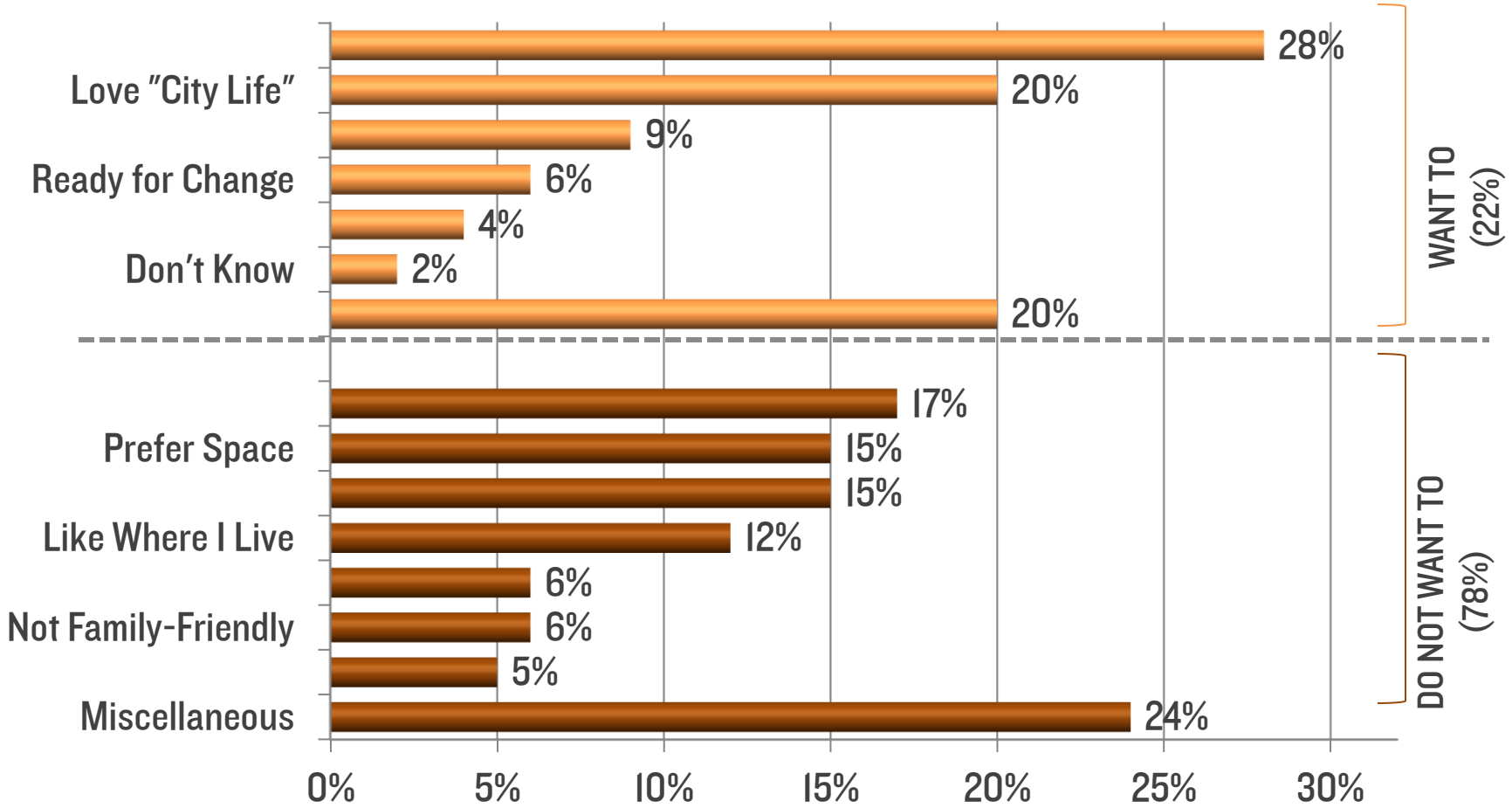
WOULD YOU CONSIDER LIVING DOWNTOWN? (BY COUNTY)

With little surprise, those respondents currently living in Salt Lake County had the highest interest in living Downtown, at 29%. Just below them and still above the statewide average was Davis County at 23%. Utah, Weber and Other Counties were below the statewide average of 22%.



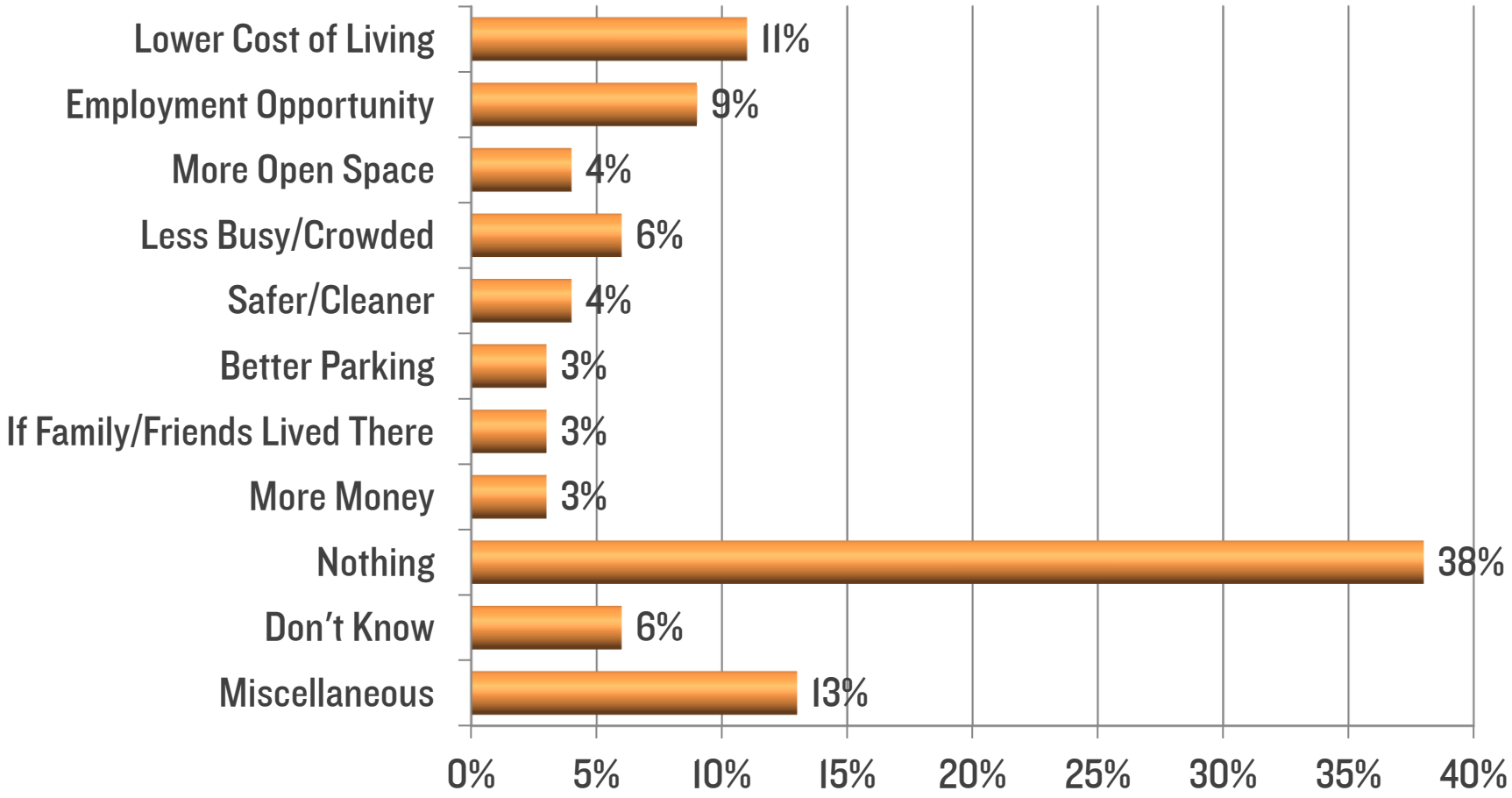
REASONS FOR WANTING/NOT WANTING TO LIVE DOWNTOWN

The top reasons for wanting to live Downtown were related to convenience, being closer to work and general love for city life. The two main deterrents for wanting to live Downtown were both related to less space and more people.



WHAT WOULD INCREASE YOUR INTEREST IN LIVING DOWNTOWN?

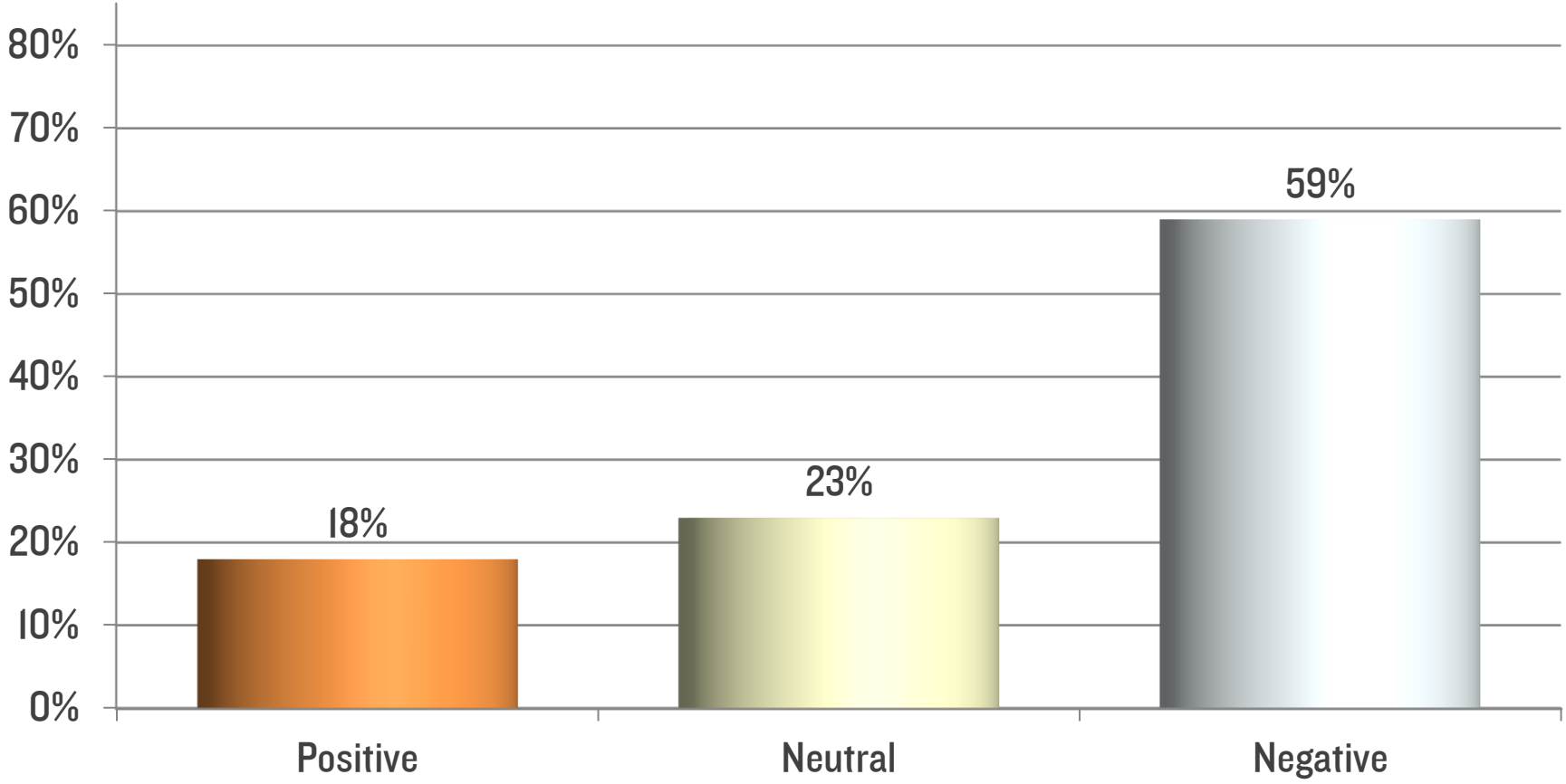
Although several answers were provided that would increase interest in living Downtown, 38% still said nothing would change their mind. Excluding the 6% who answered "Didn't Know," a little more than half (56%) at least had suggestions of improvements that would make them more interested in living Downtown.



HOMELESSNESS DOWNTOWN

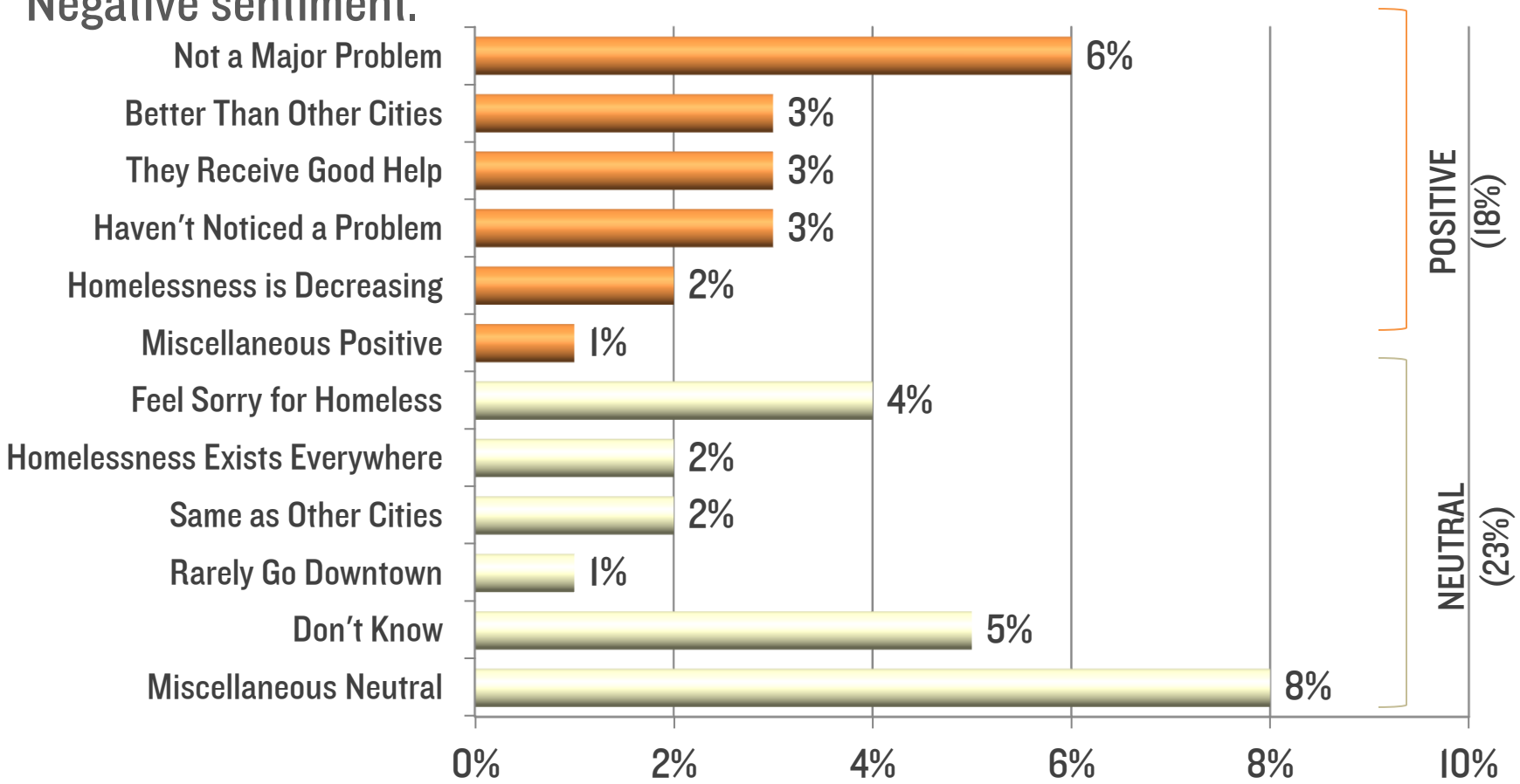
WHAT IS YOUR PERCEPTION OF HOMELESSNESS DOWNTOWN?

This was a new, open ended question for 2013. Similar answers were aggregated into clusters of responses, which will be reported in forthcoming slides. Responses were also aggregated based on sentiment, into Positive, Neutral and Negative. About 3 in 5 respondents (59%) perceived homelessness negatively in Downtown Salt Lake.



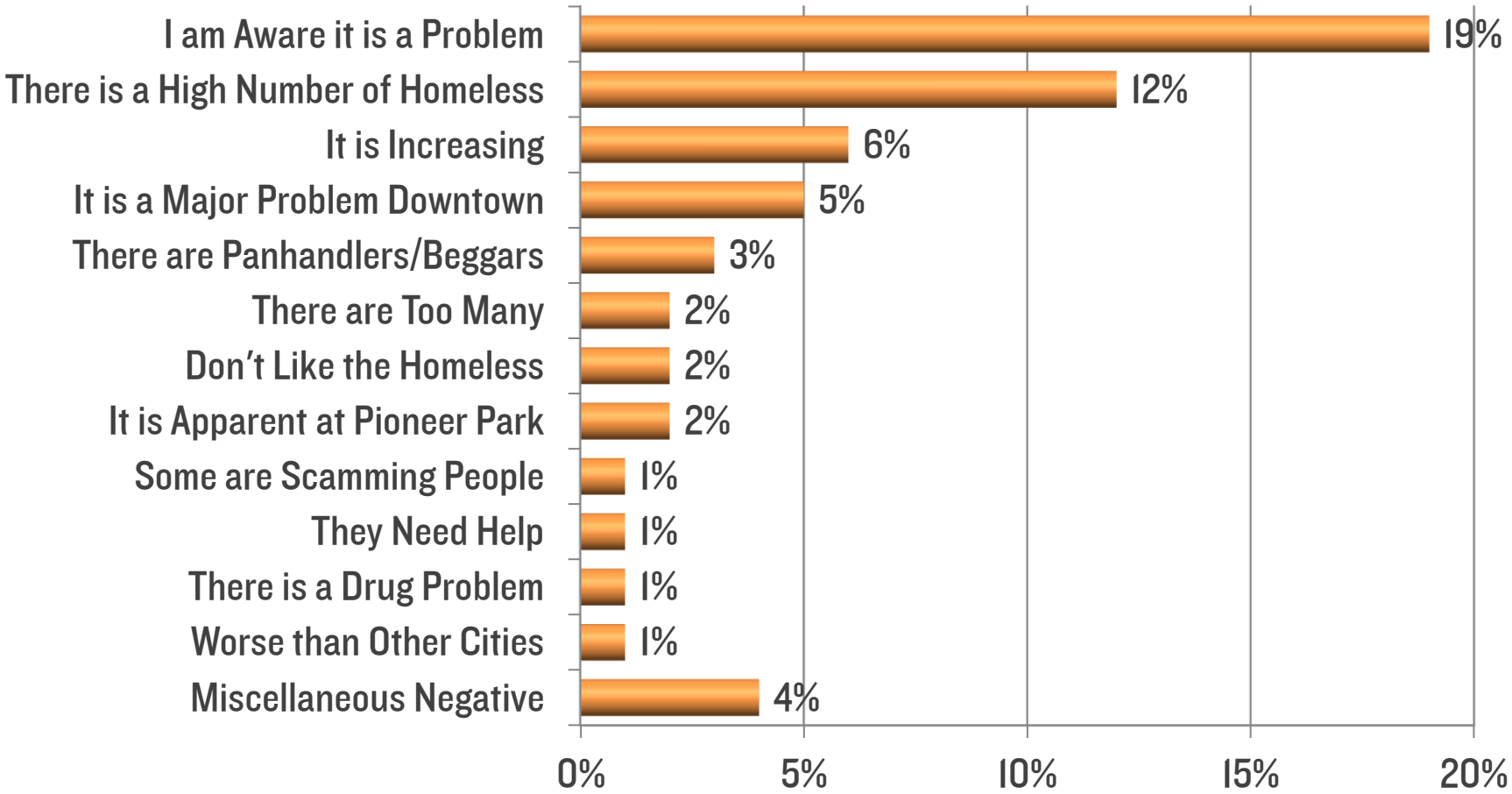
SPECIFIC HOMELESSNESS PERCEPTIONS – POSITIVE/NEUTRAL

Responses that were grouped into Positive or Neutral sentiments primarily compared Downtown Salt Lake's homeless to other cities or had a generally low perception of it. No answers supported homelessness, but instead had less critical perceptions than those with answers to the Negative sentiment.



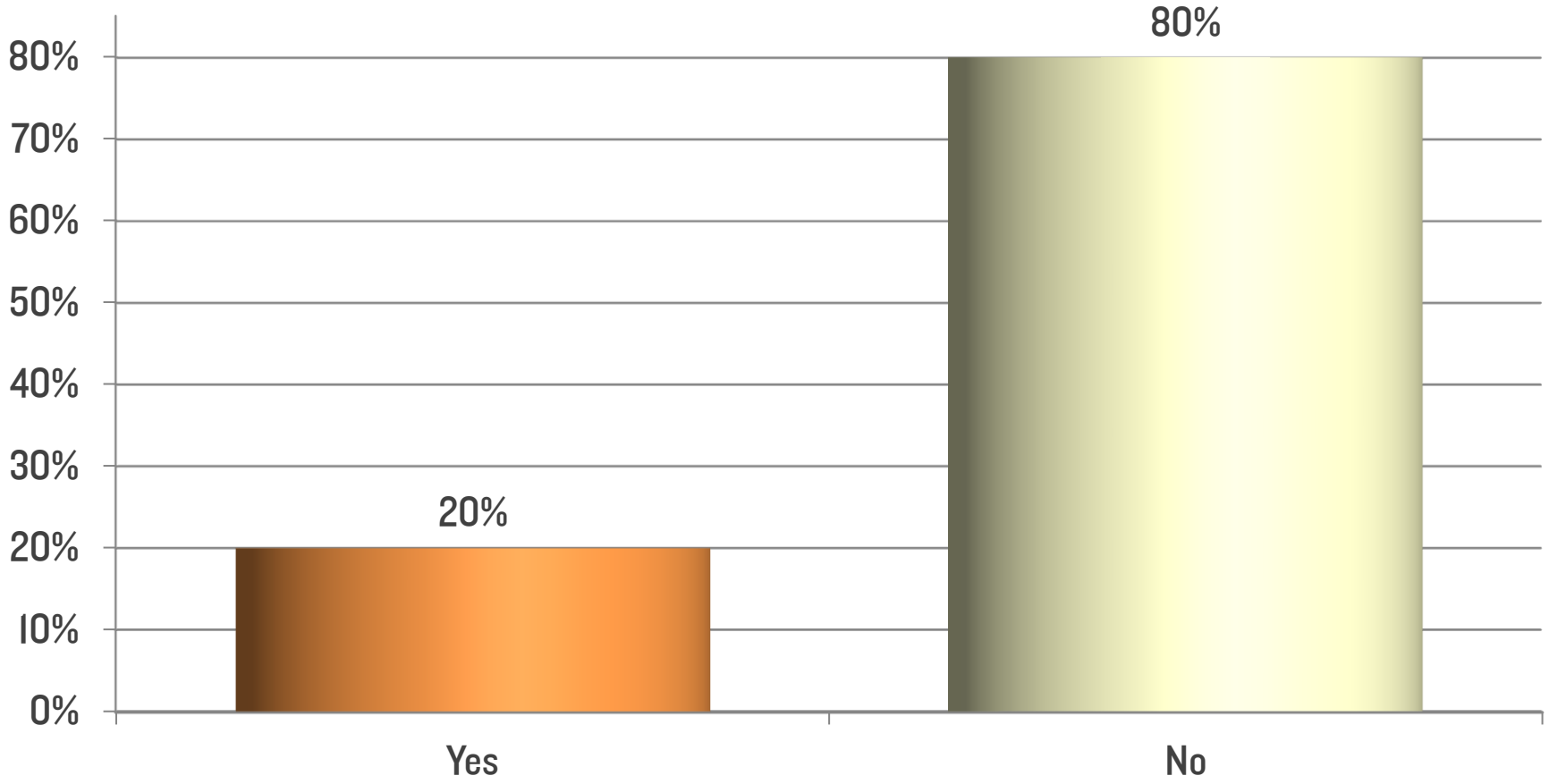
SPECIFIC HOMELESSNESS PERCEPTIONS – NEGATIVE

The three highest Negative perception responses (37%) were general and did not single out specific issues or areas of Downtown involving homelessness. Only 5% perceived it as a major problem and only 1% perceiving drugs as a large issue. Panhandling, begging and "scamming" made only 4% of responses.



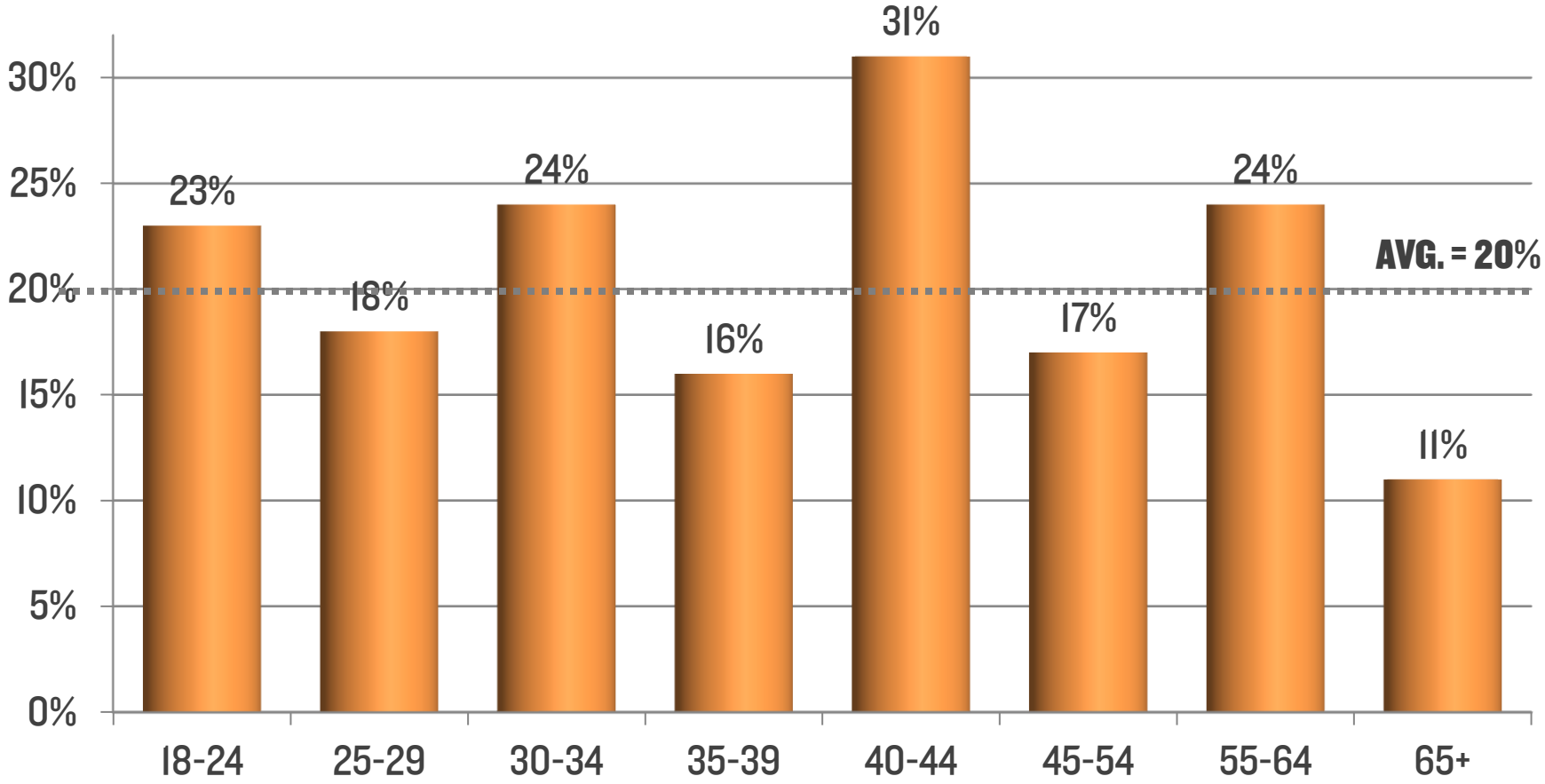
DOES PANHANDLING SPECIFICALLY EVER DETER YOU FROM VISITING DOWNTOWN?

4 in 5 respondents were not deterred in visiting Downtown Salt Lake due to panhandling specifically.



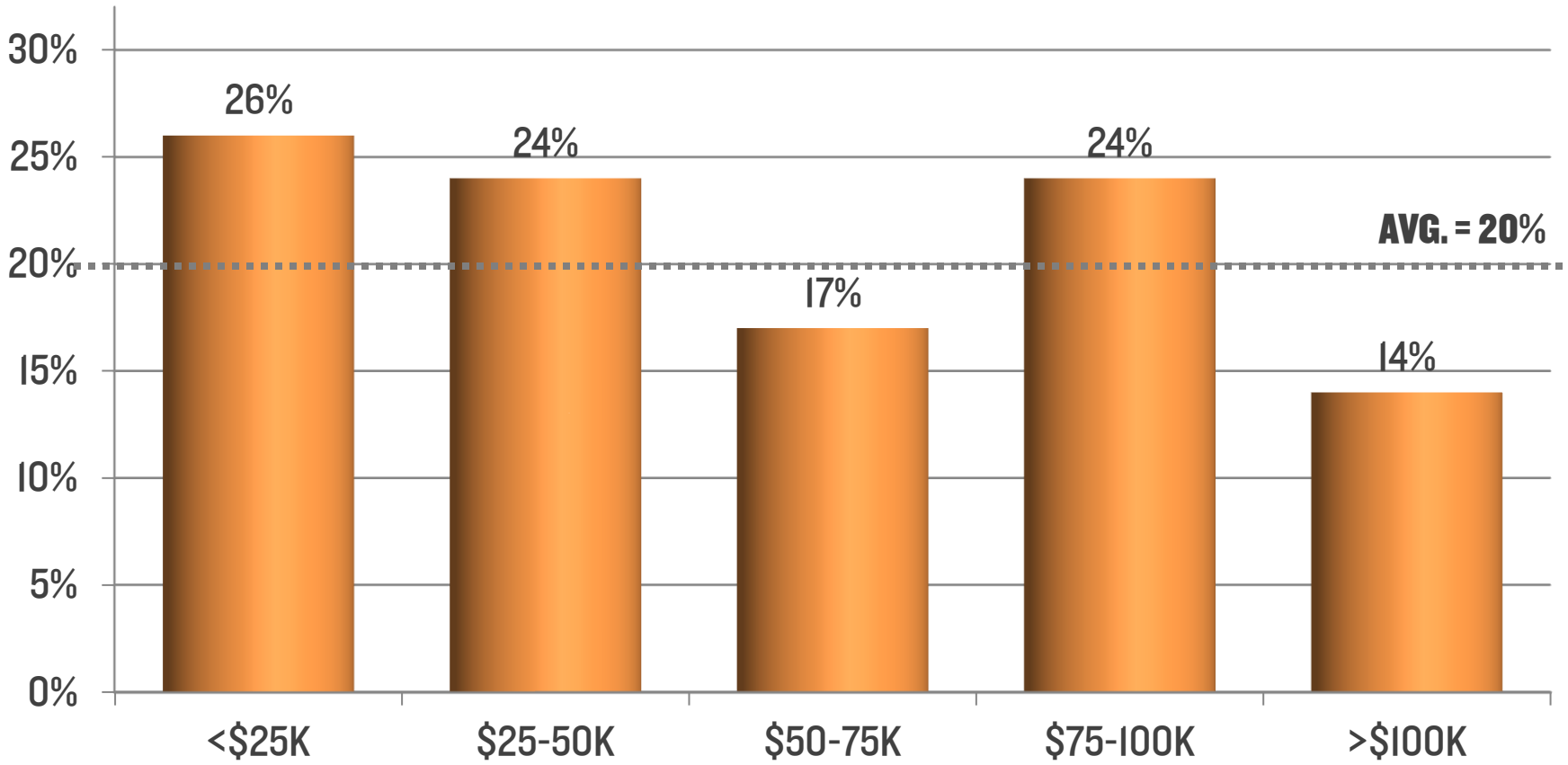
PANHANDLING DETERRENCE (BY AGE)

For the 1 in 5 respondents who were deterred in visiting Downtown because of panhandling, age did not seem to have a large factor. Those aged 40 – 44 were deterred most at 31%. After that, the percentage of ages deterred varied from a high of 24% to a low of 11%.



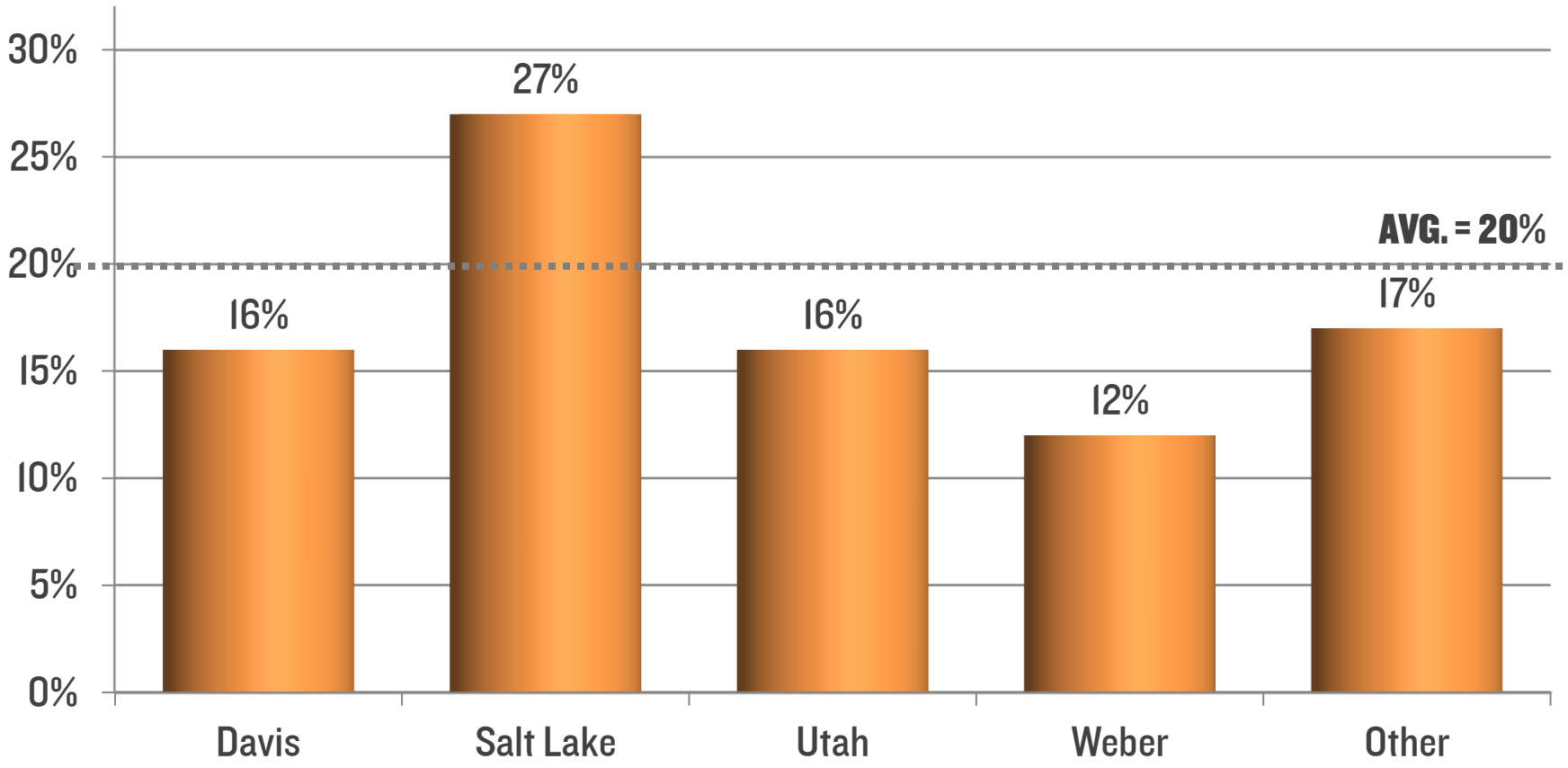
PANHANDLING DETERRENCE (BY INCOME)

Household Income also did not seem to play a large factor in being deterred from visiting Downtown due to panhandling. Those with < $25K had the highest percentage at 26% while those >$100K had the lowest at 14%. All other HHI levels fell between the two.



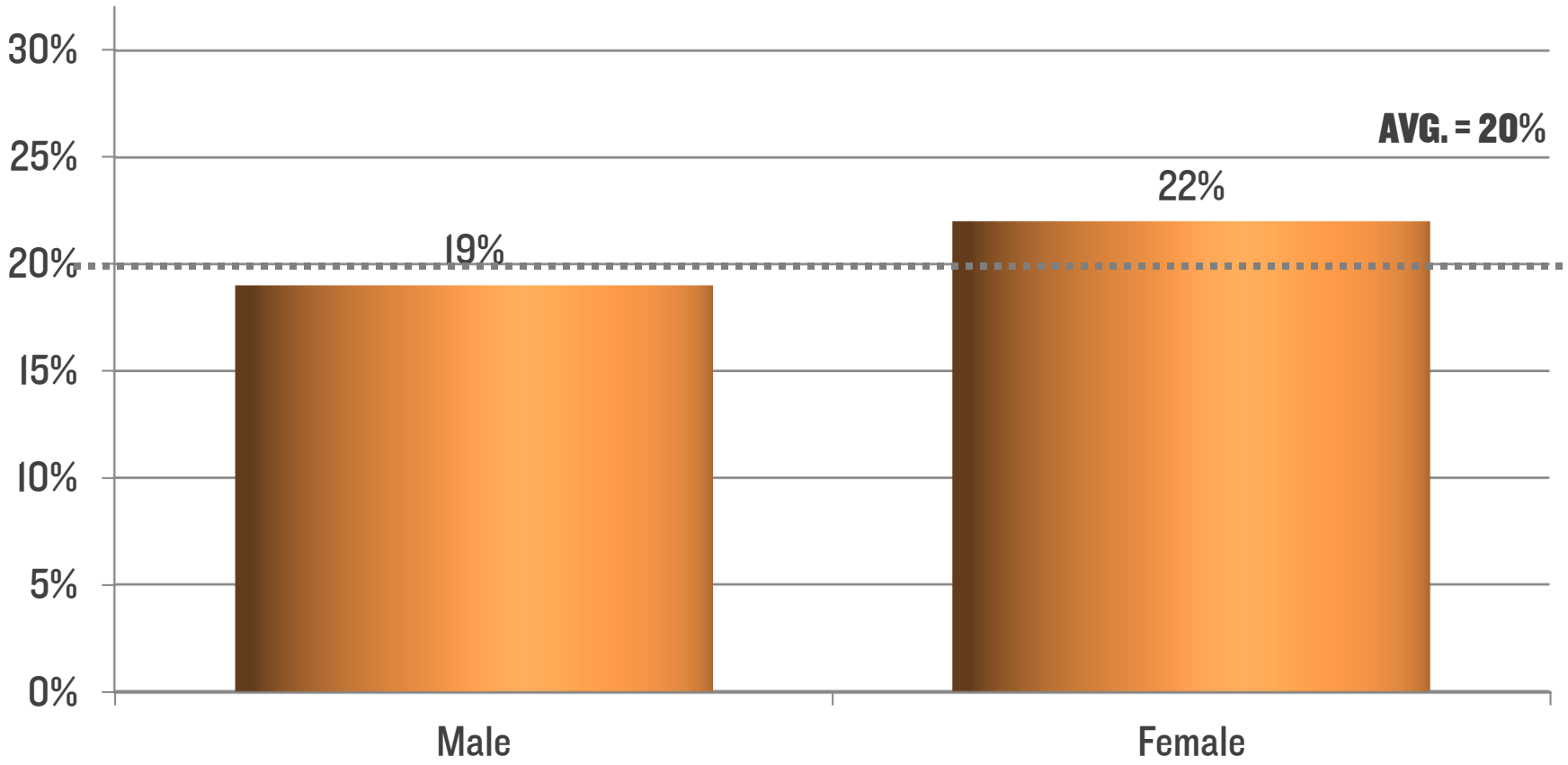
PANHANDLING DETERRENCE (BY COUNTY)

Somewhat surprisingly, residents in Salt Lake County were most deterred (27%) from visiting Downtown Salt Lake because of panhandling. Utah, Davis and Other Counties averaged 16.5%, while Weber County was the lowest at 12%.



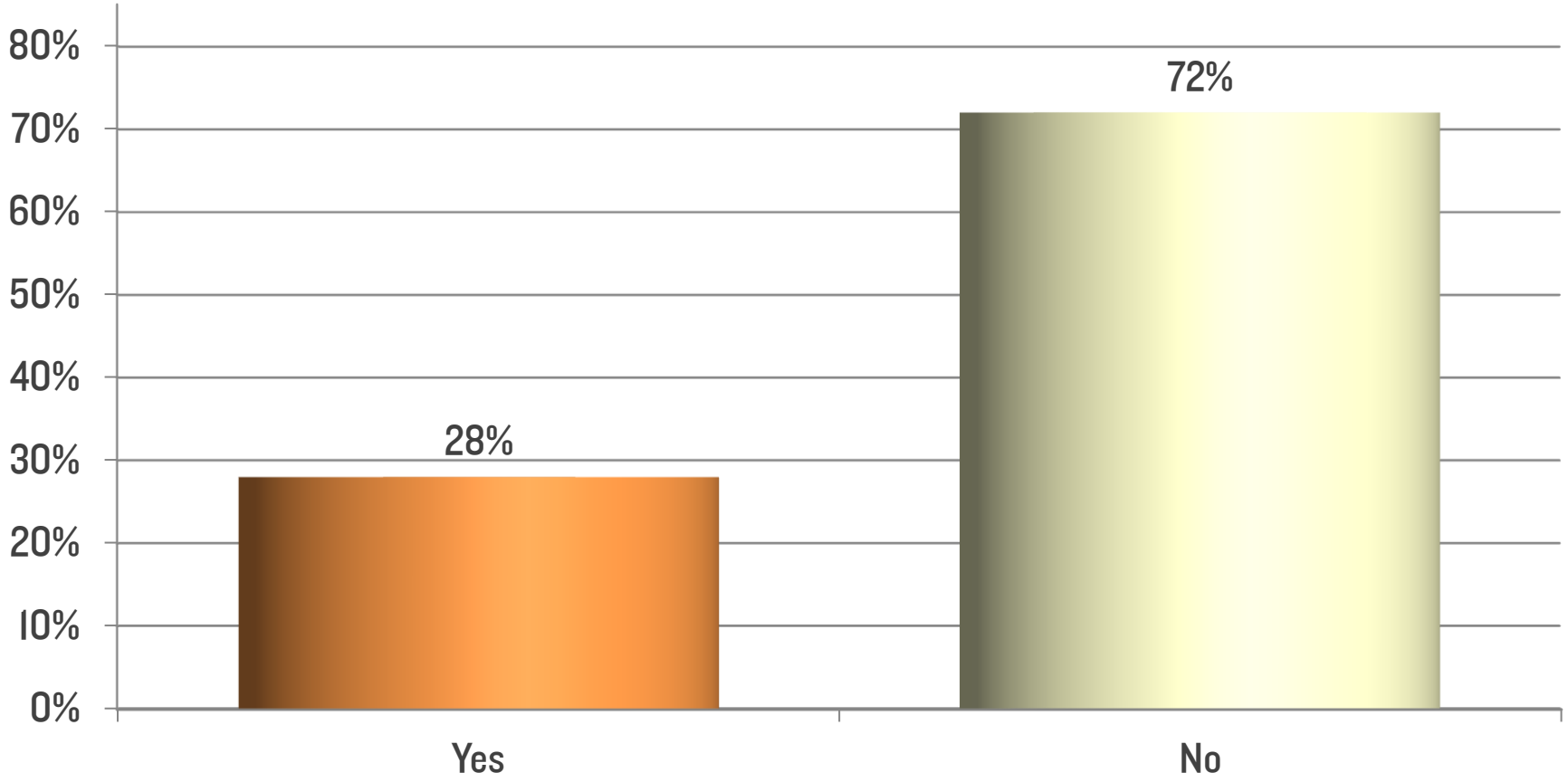
PANHANDLING DETERRENCE (BY GENDER)

Females were slightly more deterred than males from visiting Downtown due to panhandling at 22% compared to 19%, respectively.



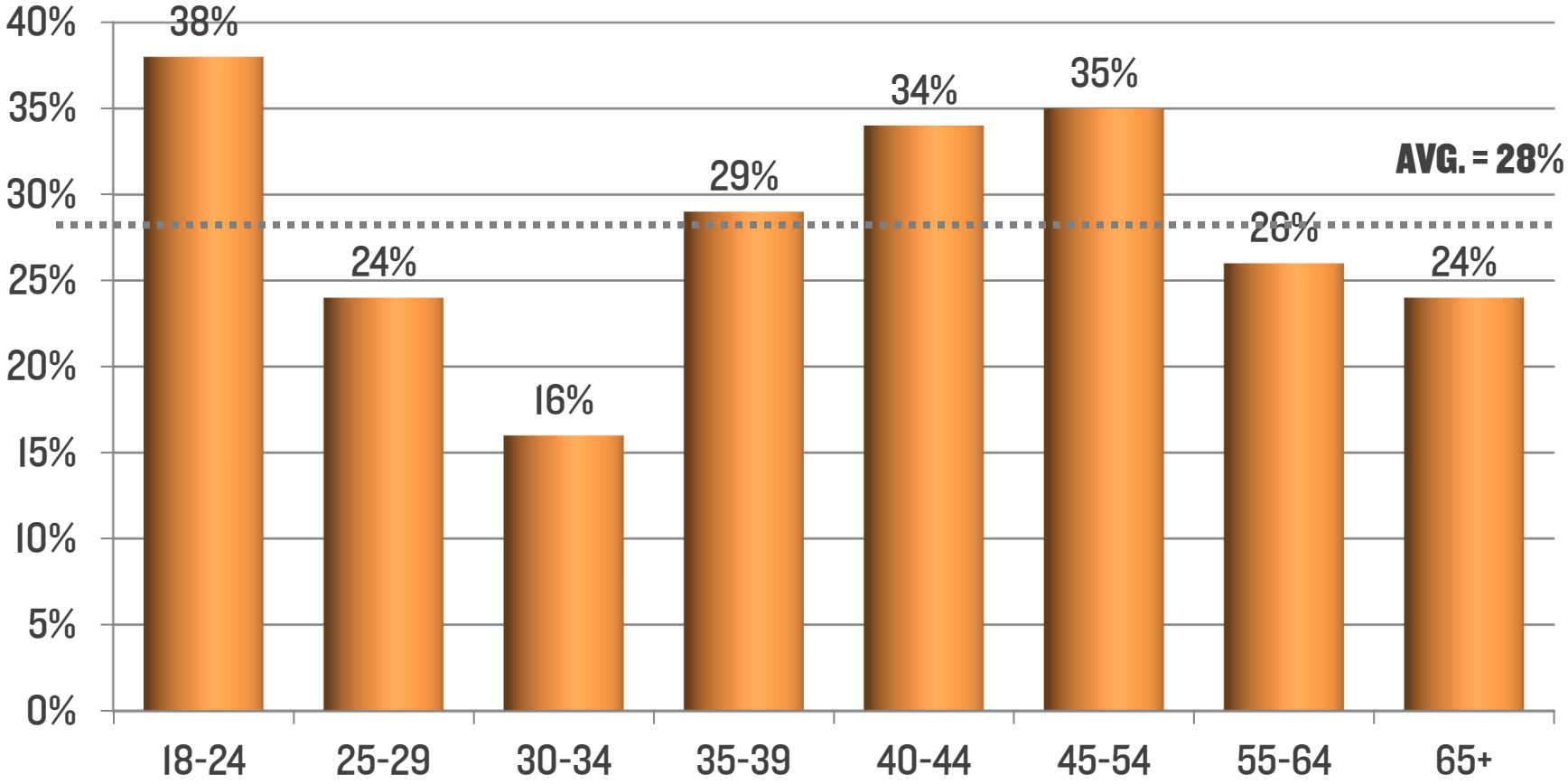
HAVE YOU GIVEN MONEY TO A PANHANDLER IN PAST 12 MONTHS?

Almost 3 out of 10 respondents (28%) had given money to panhandlers in the past 12 months.



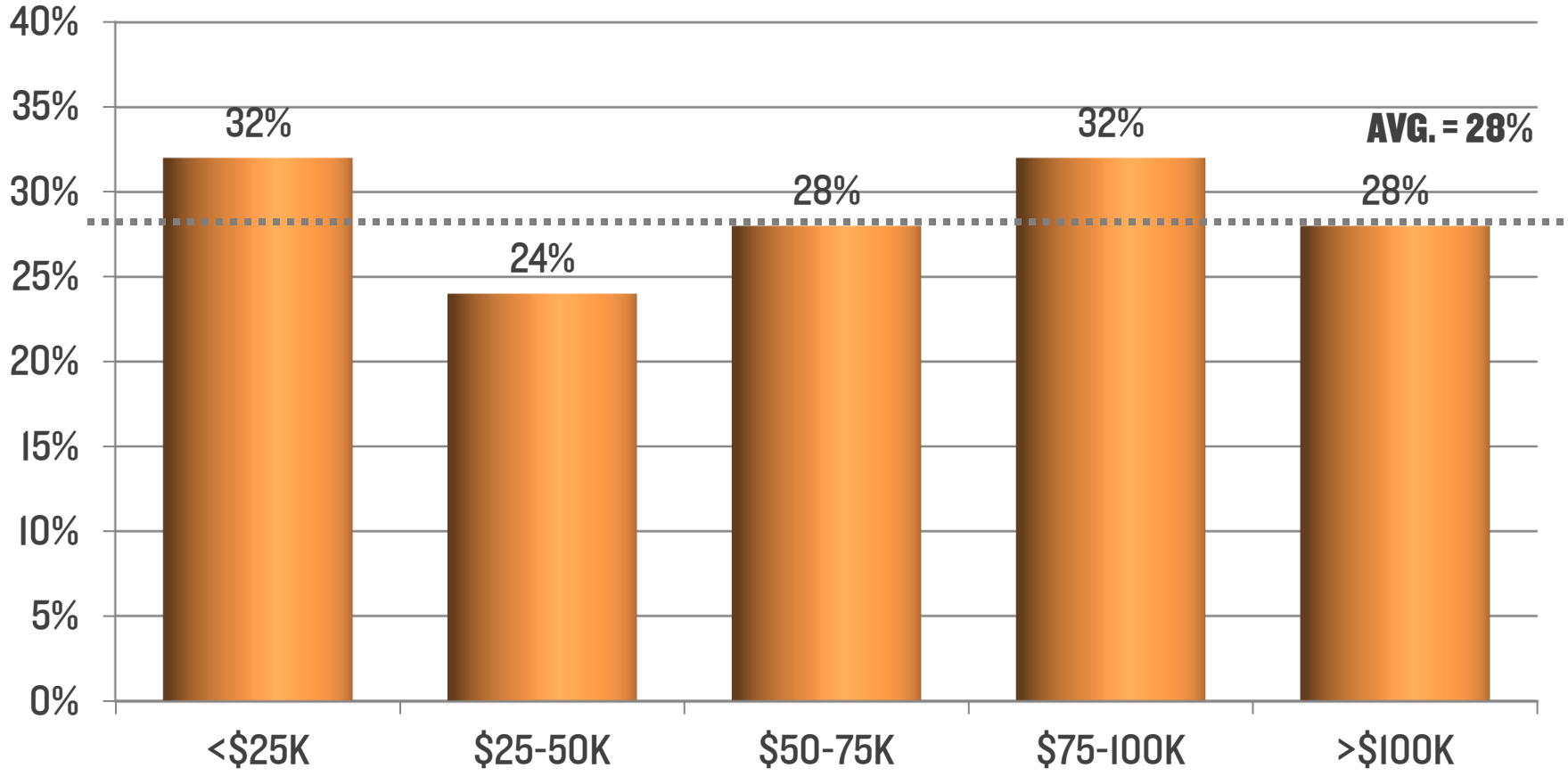
GIVEN MONEY TO PANHANDLER (BY AGE)

Of the total respondents who gave money to panhandlers in the past 12 months, those aged 18 – 24 and 40 – 54 were above the statewide average of 28%. It's interesting the decline experienced in the age group 25 – 34 and 55+.



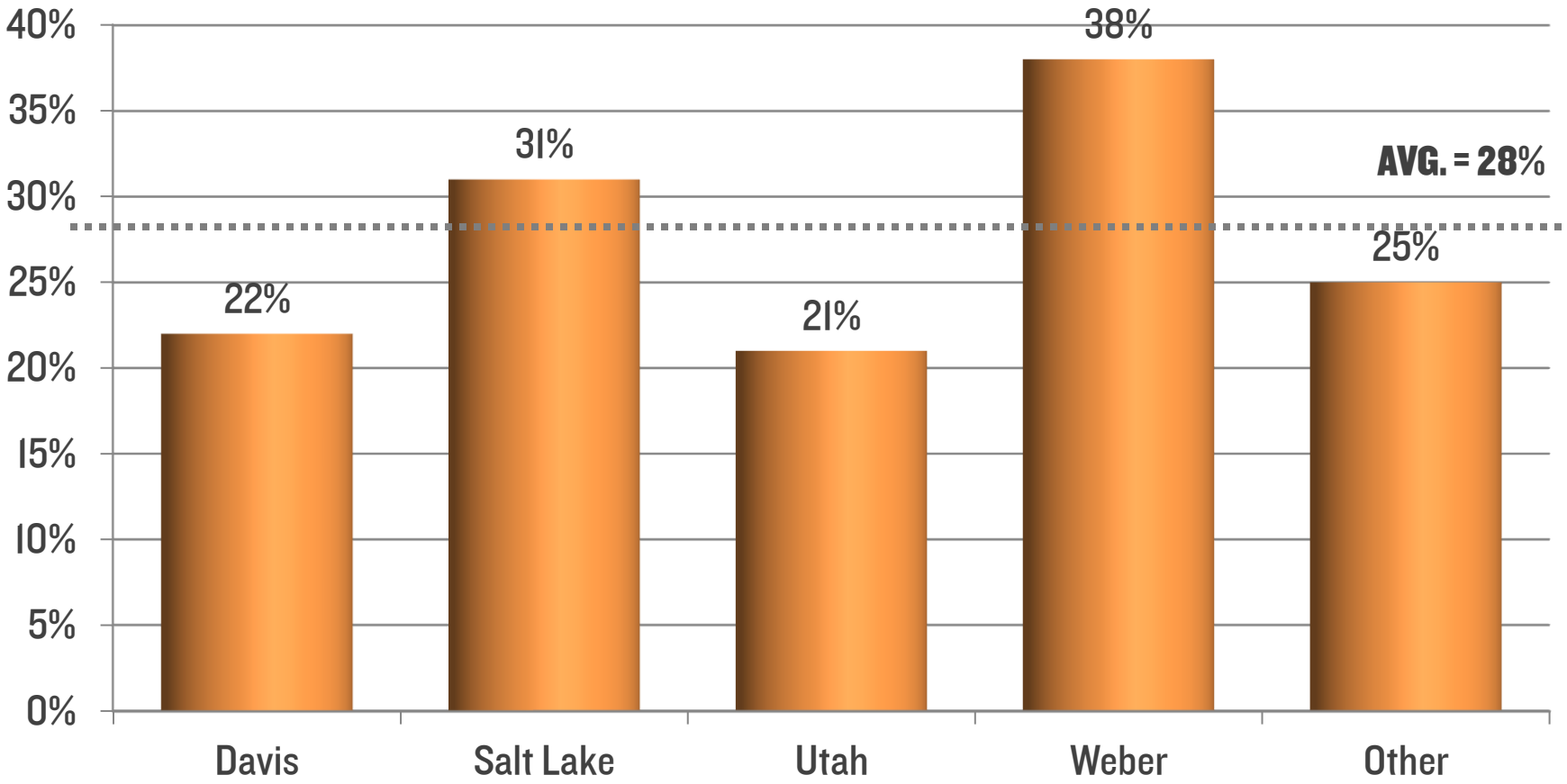
GIVEN MONEY TO PANHANDLER (BY INCOME)

Household income did not seem to be a large differentiator in who gave money to panhandlers over the past 12 months. Those with $25 – 50K were the lowest at 24%, with all other HHI groups averaging 30%.



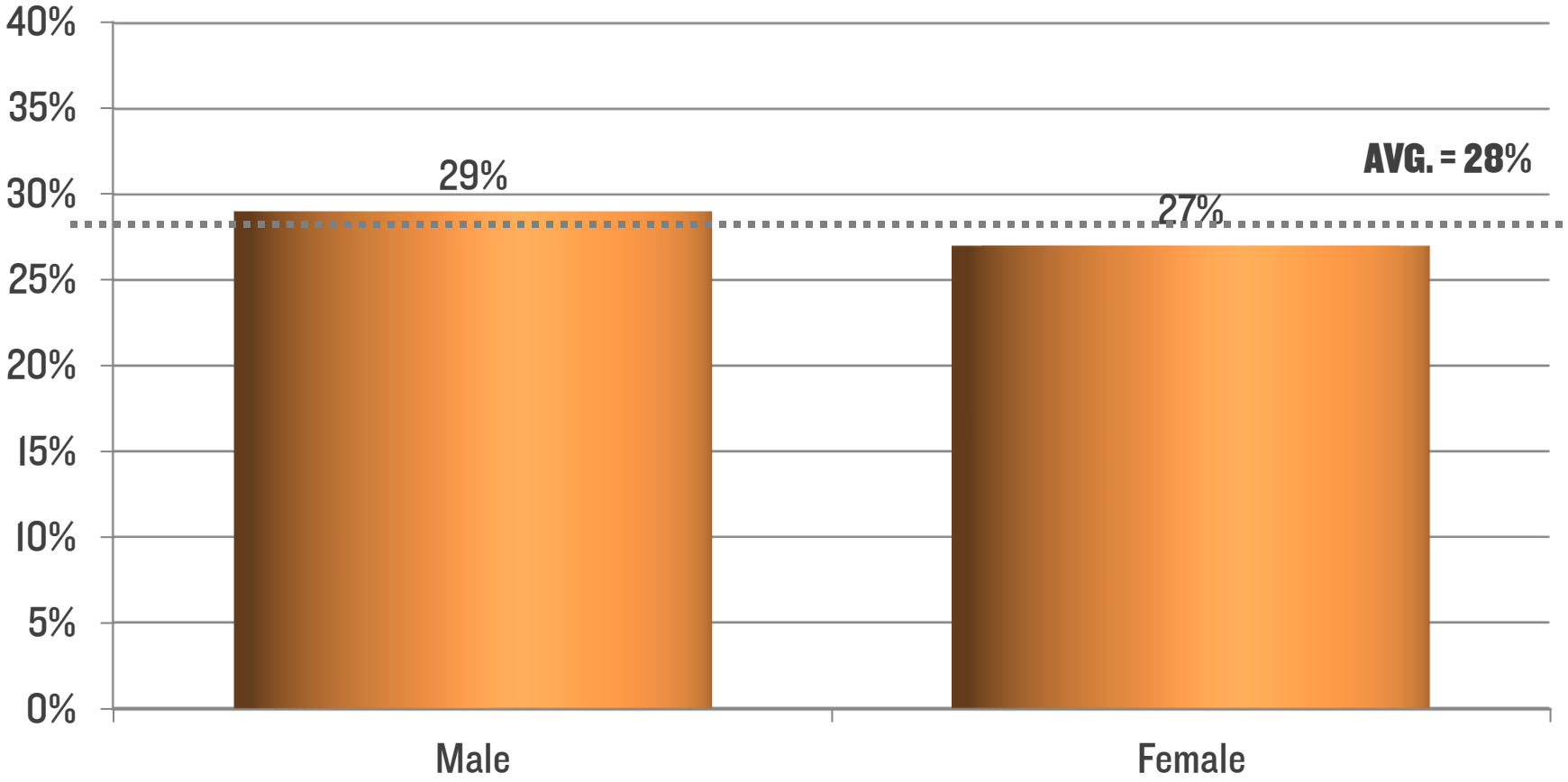
GIVEN MONEY TO PANHANDLER (BY COUNTY)

Respondents from Weber and Salt Lake Counties who had given money to panhandlers were above the statewide average of 28% with 38% and 31%, respectively. Davis and Utah Counties were similar and below the average at 22% and 21%, respectively.



GIVEN MONEY TO PANHANDLER (BY GENDER)

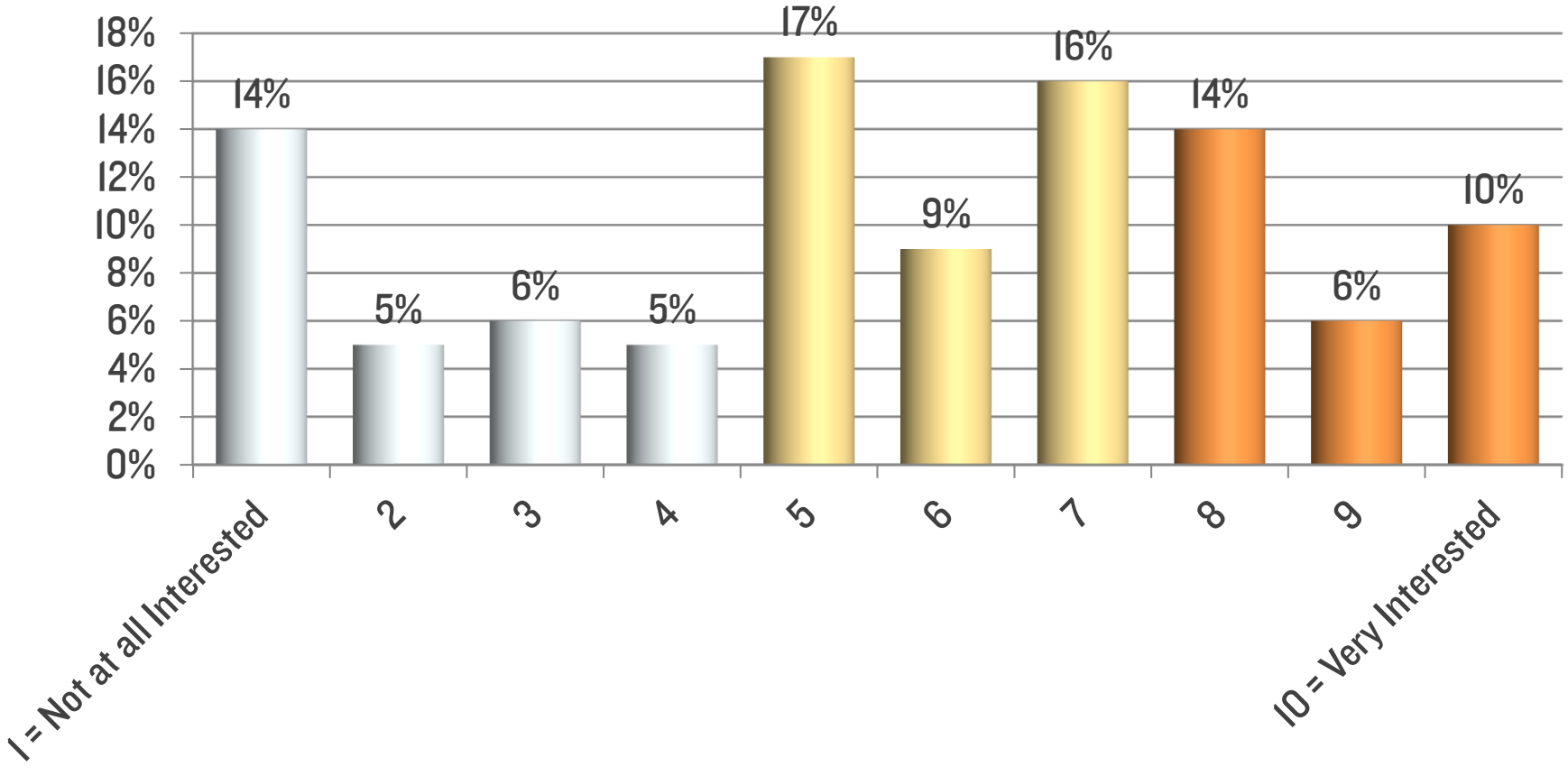
Gender seemed to be a minimal factor in a respondent having given money to a panhandler in the last 12 months. With males at 29% and Females 27%, they were just slightly above and below the statewide average.



DOWNTOWN DINING

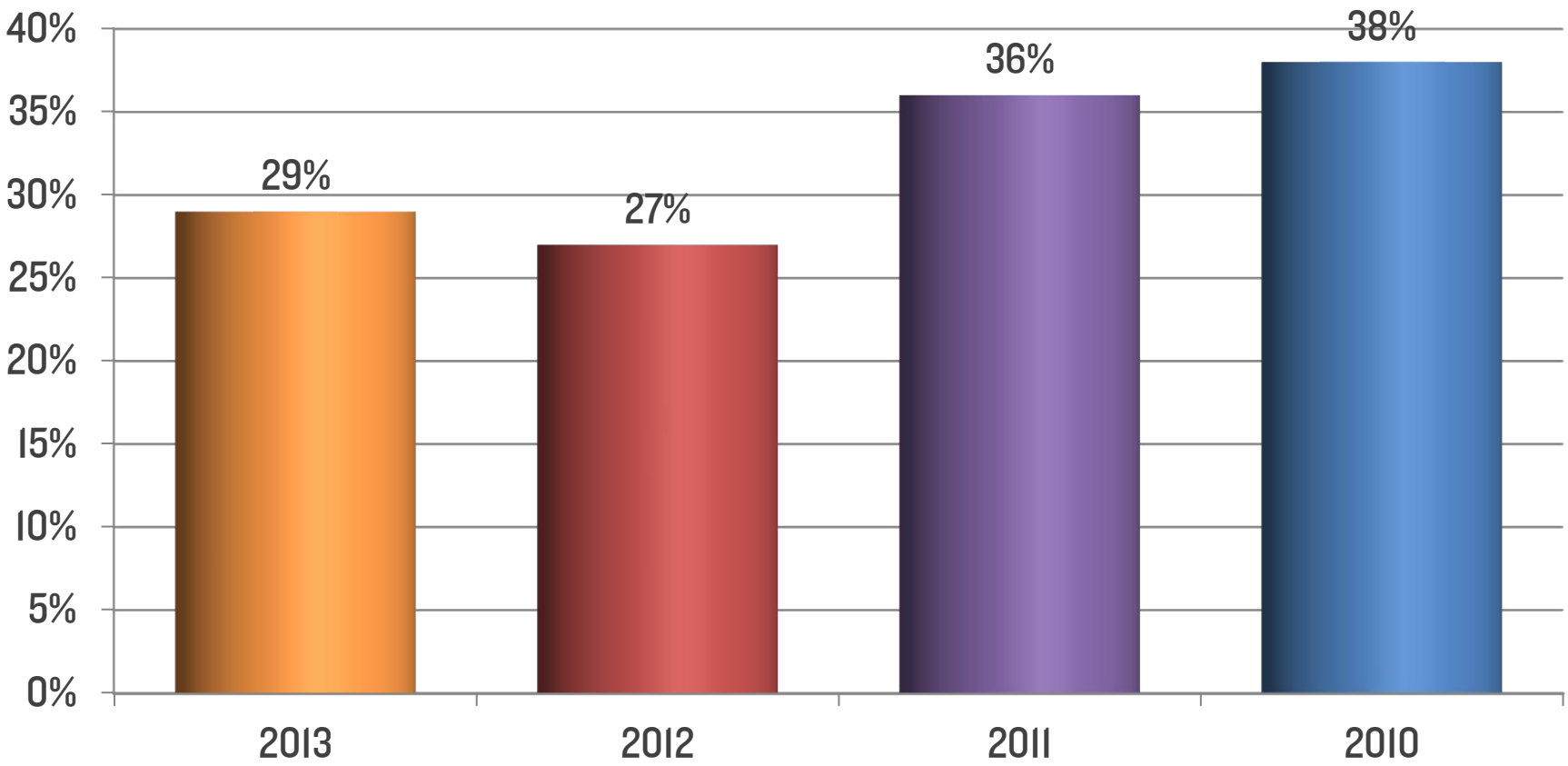
INTEREST IN DINING DOWNTOWN SALT LAKE

Almost one-third of respondents (30%), rated their interest in dining in Downtown Salt Lake as an 8, 9, or 10 AND 1, 2, 3 or 4. Forty-two percent had more moderate interest and selected 5, 6 or 7.



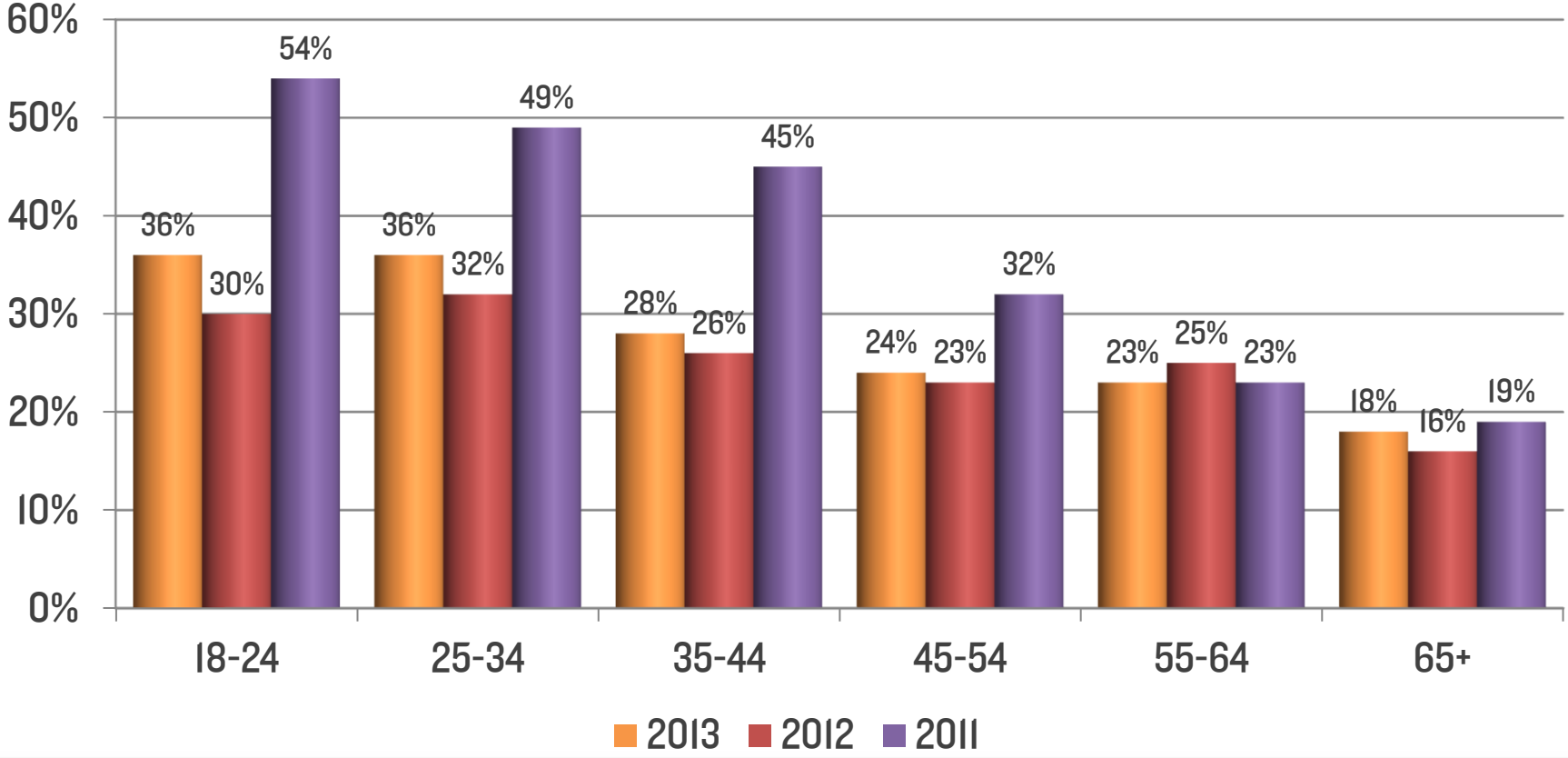
INTEREST IN DINING DOWNTOWN SALT LAKE

Twenty-nine percent of respondents rated their interest in dining in Downtown Salt Lake as an 8, 9, or 10. This is up from 2012, but still down from the two prior years. This large discrepancy is likely due to the changes in survey questions.



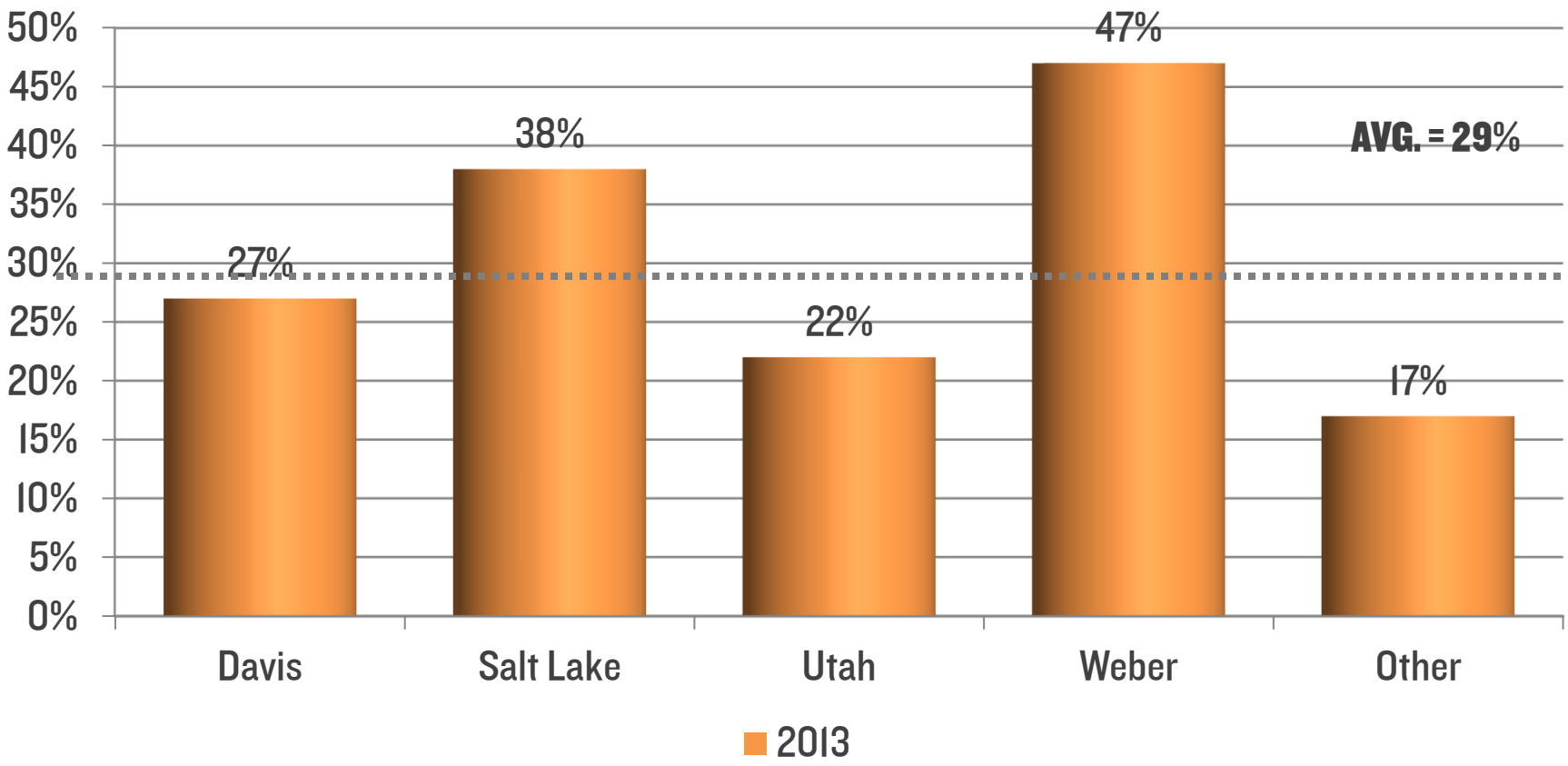
INTEREST IN DINING DOWNTOWN SALT LAKE (BY AGE)

Interest rated as an 8, 9, or 10 was up across all age groups when compared to the prior year 2012 results, but still lower than 2011. The larger gaps observed here may suggest this question is impacted by the changes in the 2012 survey questionnaire. It is interesting that the older respondents' answers are still similar.



INTEREST IN DINING DOWNTOWN SALT LAKE (BY COUNTY)

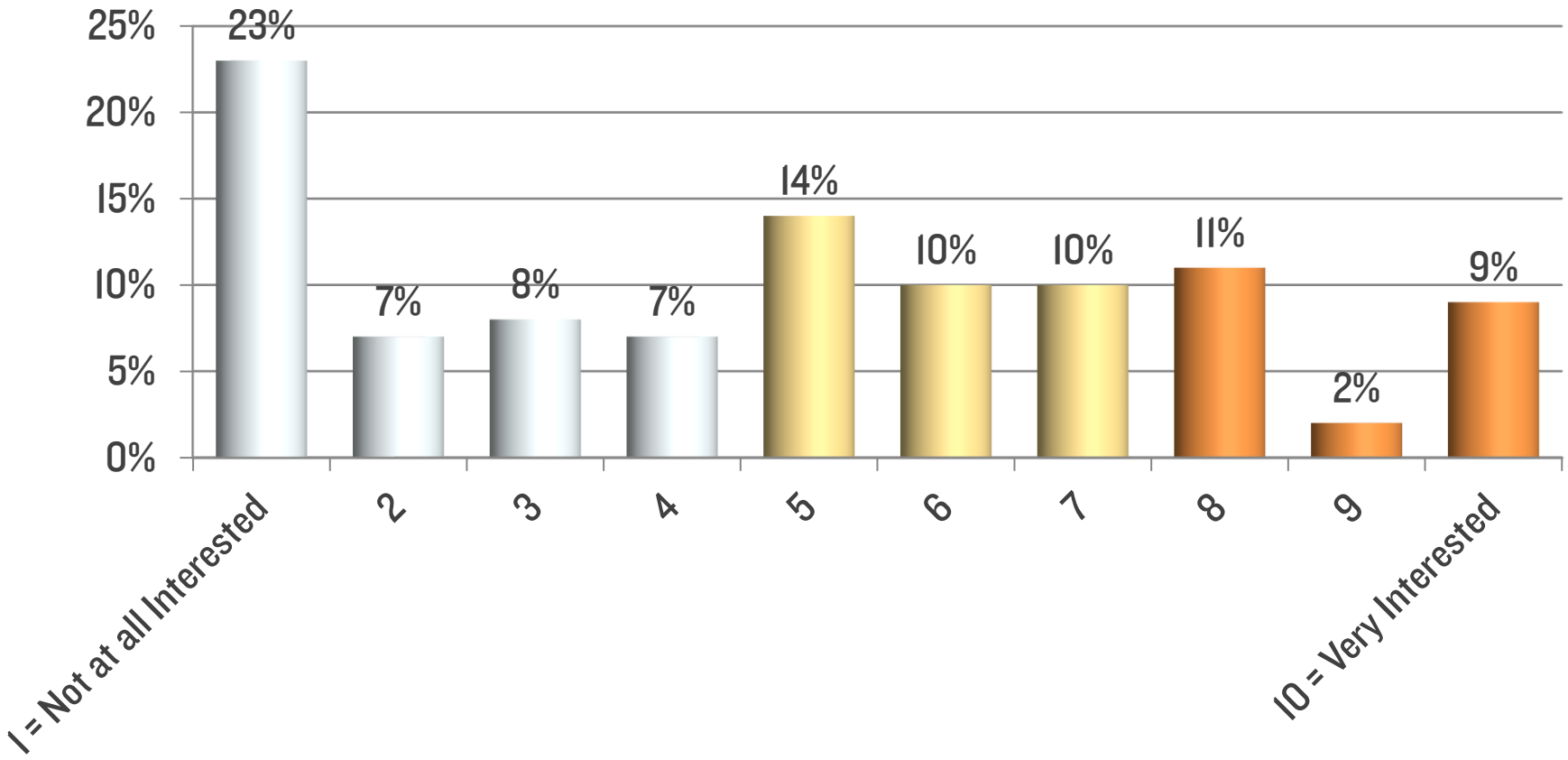
Weber County had an extraordinarily high interest in dining Downtown with 47% selecting 8, 9 or 10. The next two highest were Salt Lake and Davis Counties at 38% and 27%, respectively. Weber County seems to have high interest in visiting Downtown Salt Lake specifically for dining.



DOWNTOWN SHOPPING

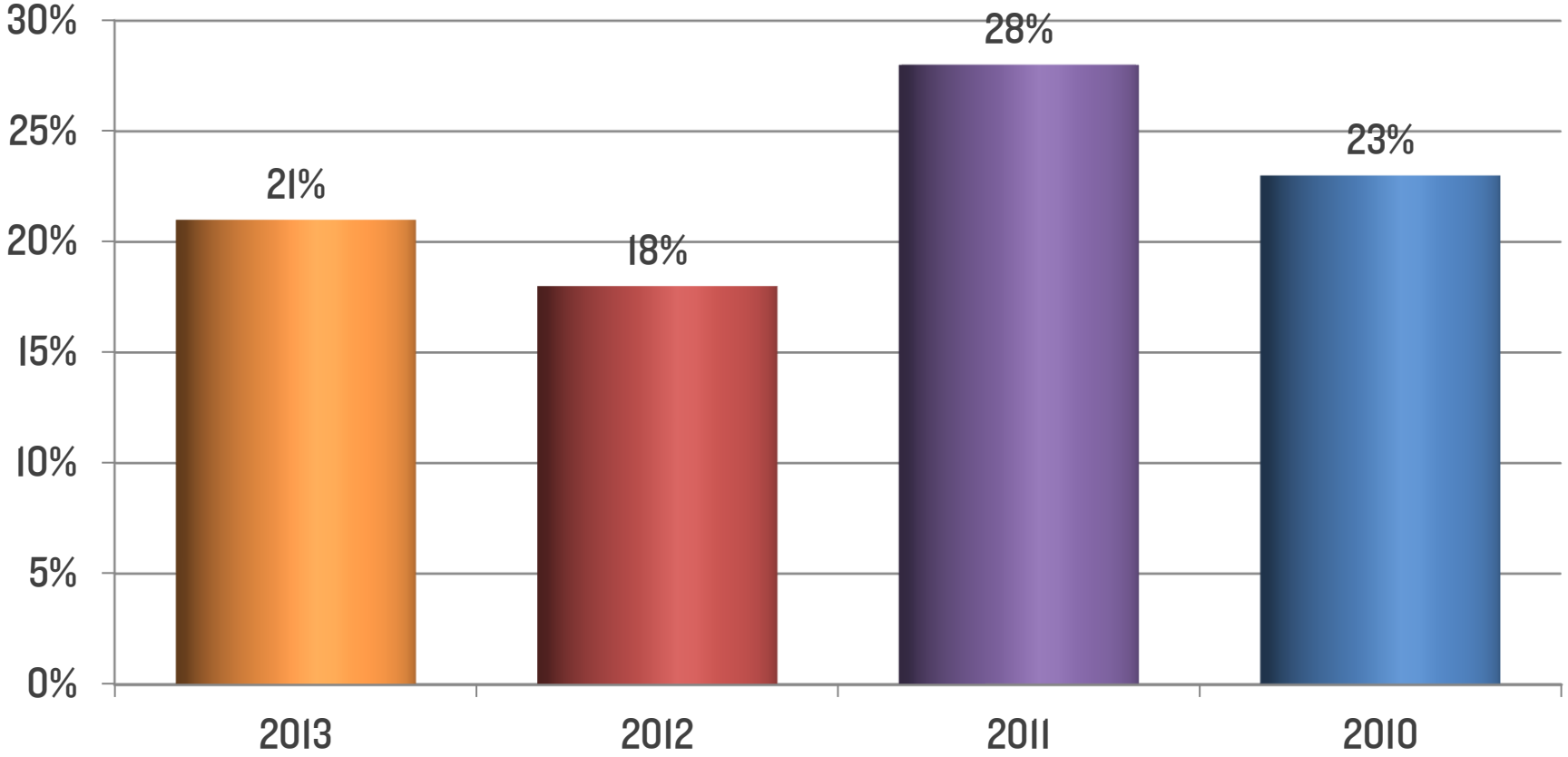
INTEREST IN SHOPPING DOWNTOWN SALT LAKE

Approximately one in five respondents (22%), rated their interest in shopping Downtown Salt Lake as an 8, 9, or 10. A third (34%) had medium interest with responses of 5, 6 or 7. Almost a quarter of respondents were not interested at all with shopping Downtown.



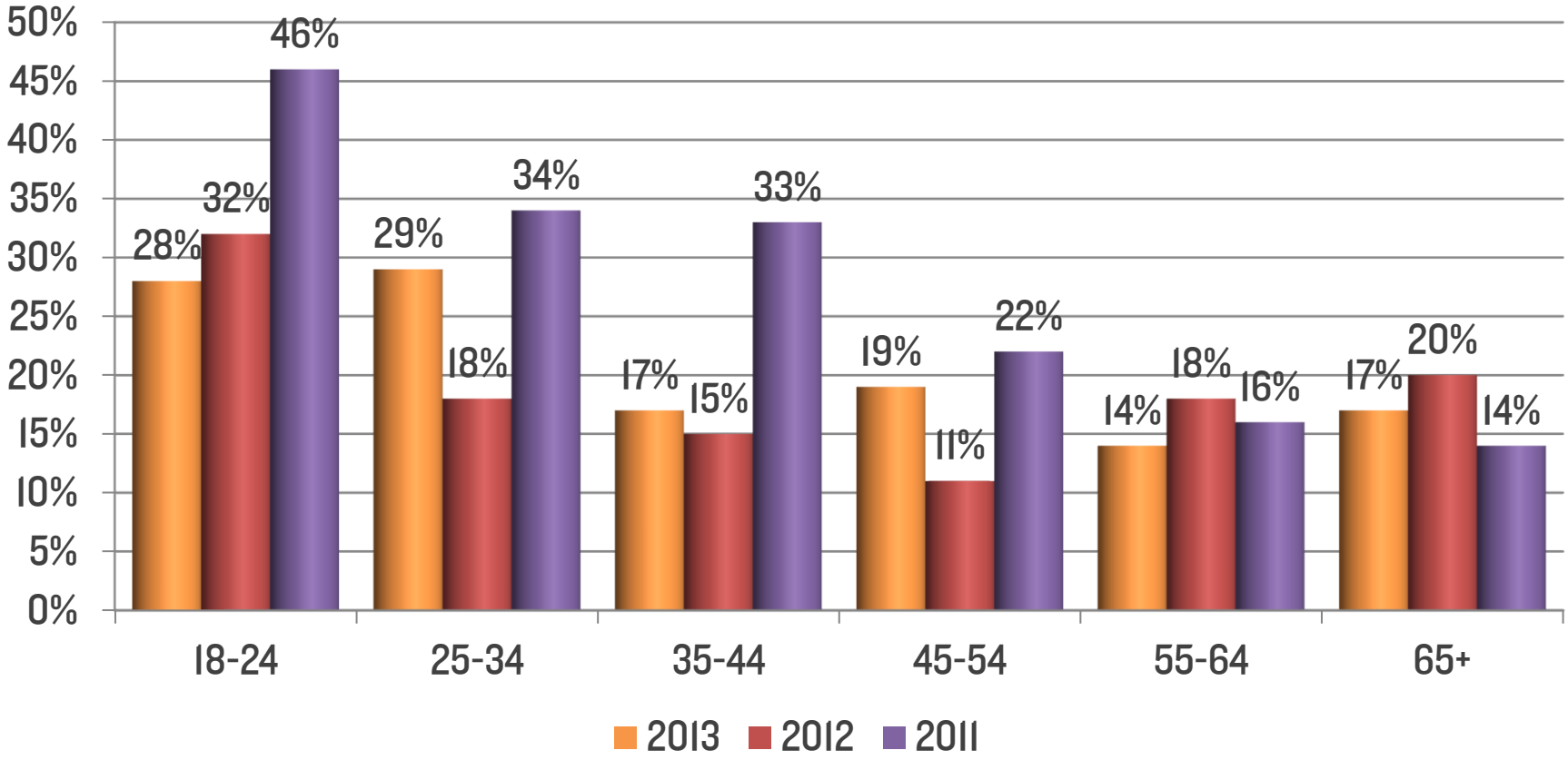
INTEREST IN SHOPPING DOWNTOWN SALT LAKE

A little more than one in five respondents (21%), rated their interest in shopping in Downtown Salt Lake as an 8, 9, or 10. This is slightly up from 2012 and is approaching the level of interest in 2010. The difference from 2010 and 2011 may also be due to changes in the survey questionnaire.



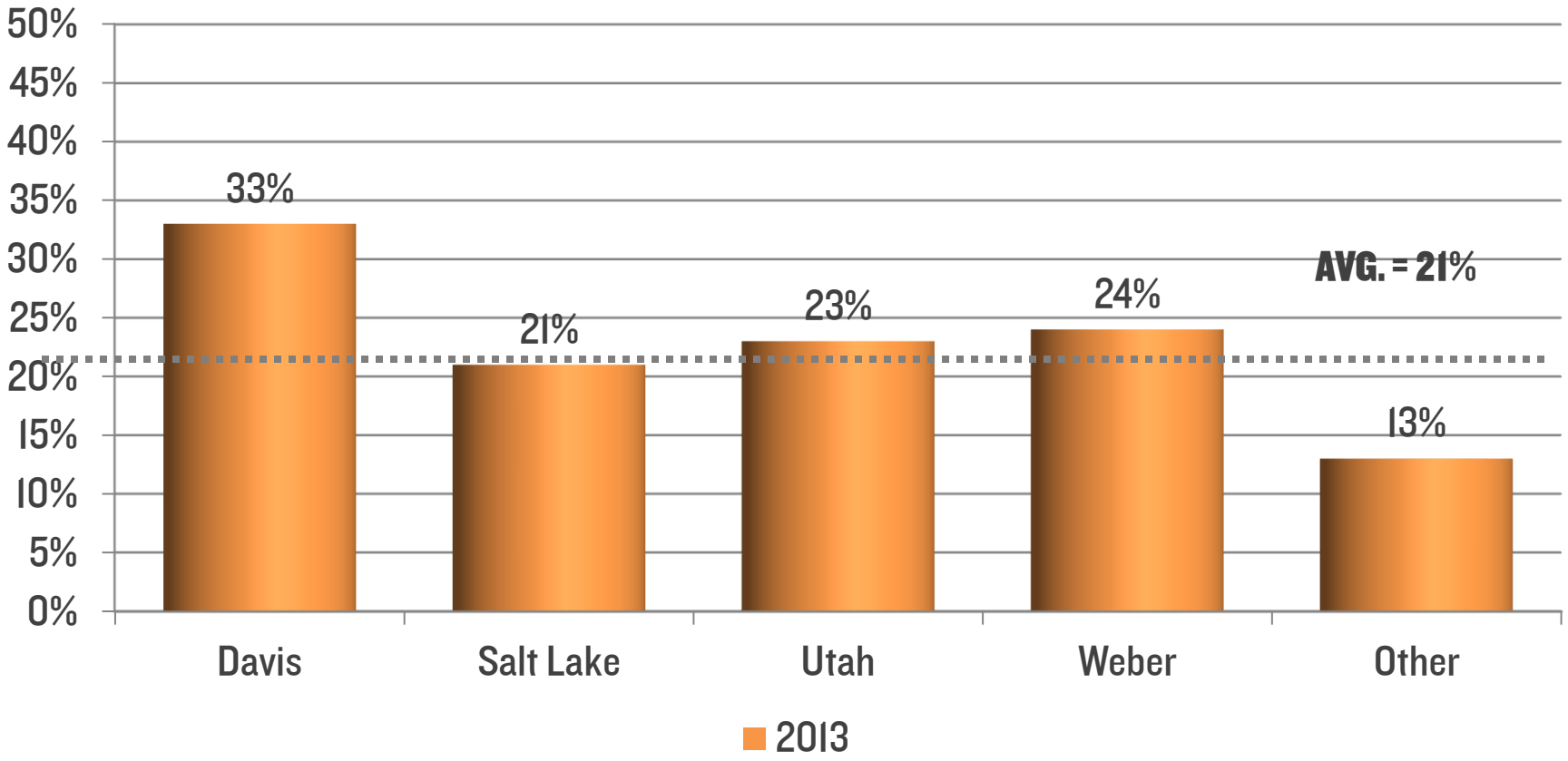
INTEREST IN SHOPPING DOWNTOWN SALT LAKE (BY AGE)

The youngest (18 – 24) and oldest (55+) age groups saw slight declines YOY, and only the 65+ group was above their 2011 level of interest. Those aged 25 – 34 and 45 – 54 saw large increases YOY, while 35 – 44 saw a minor increase. Although the modification of questions from 2011 to 2012/2013 was a factor in some responses, it appears that the level of interest to shop Downtown is also changing. While it may be somewhat waning with the young and old, interest is increasing with middle aged respondents.



INTEREST IN SHOPPING DOWNTOWN SALT LAKE (BY COUNTY)

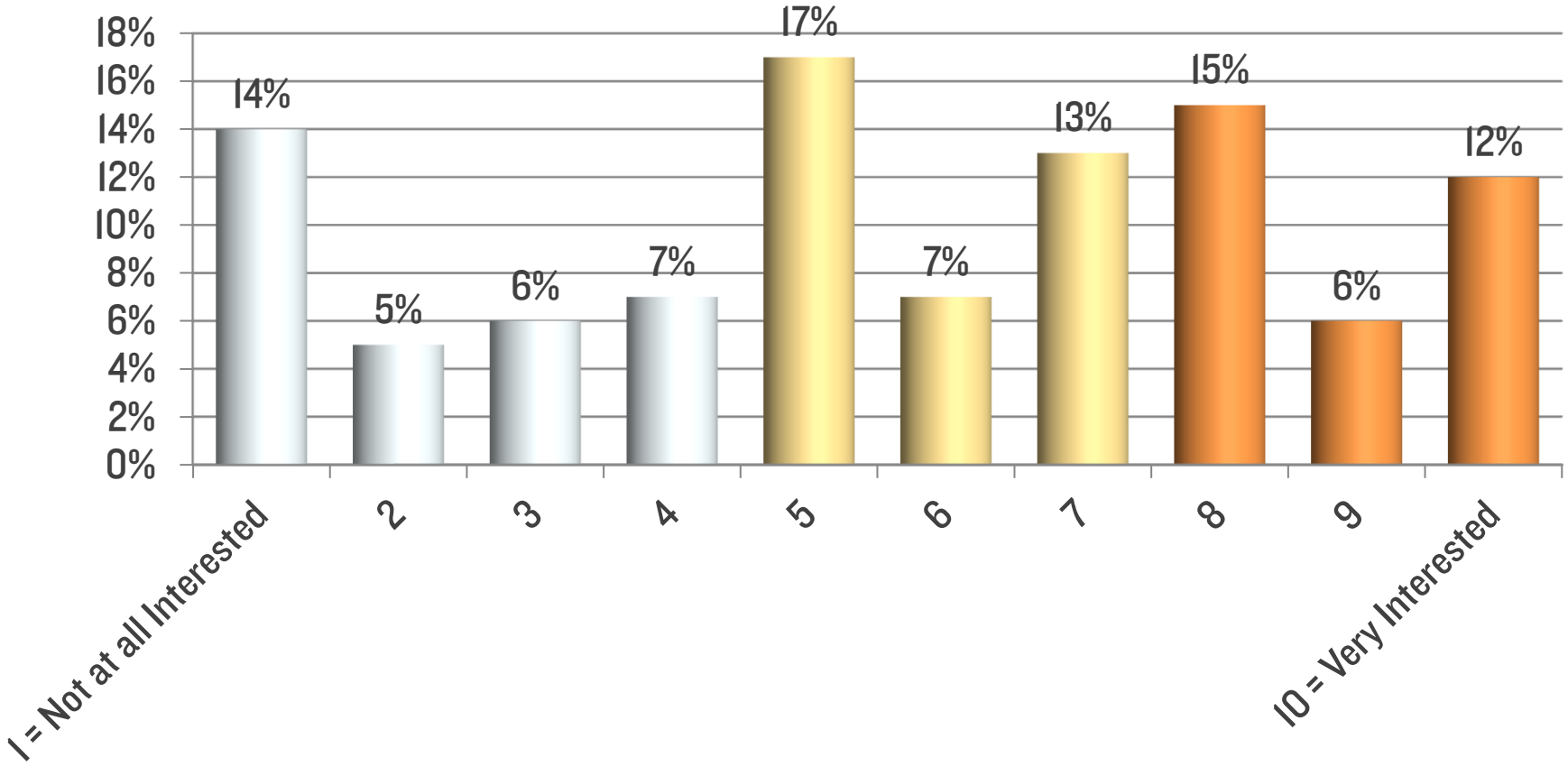
Davis County respondents had the highest interest in shopping Downtown at 33%. Surprisingly, Utah and Weber Counties had higher responses of 8, 9 or 10 to shop downtown compared to Salt Lake County.



DOWNTOWN ENTERTAINMENT, NIGHTLIFE AND OTHER

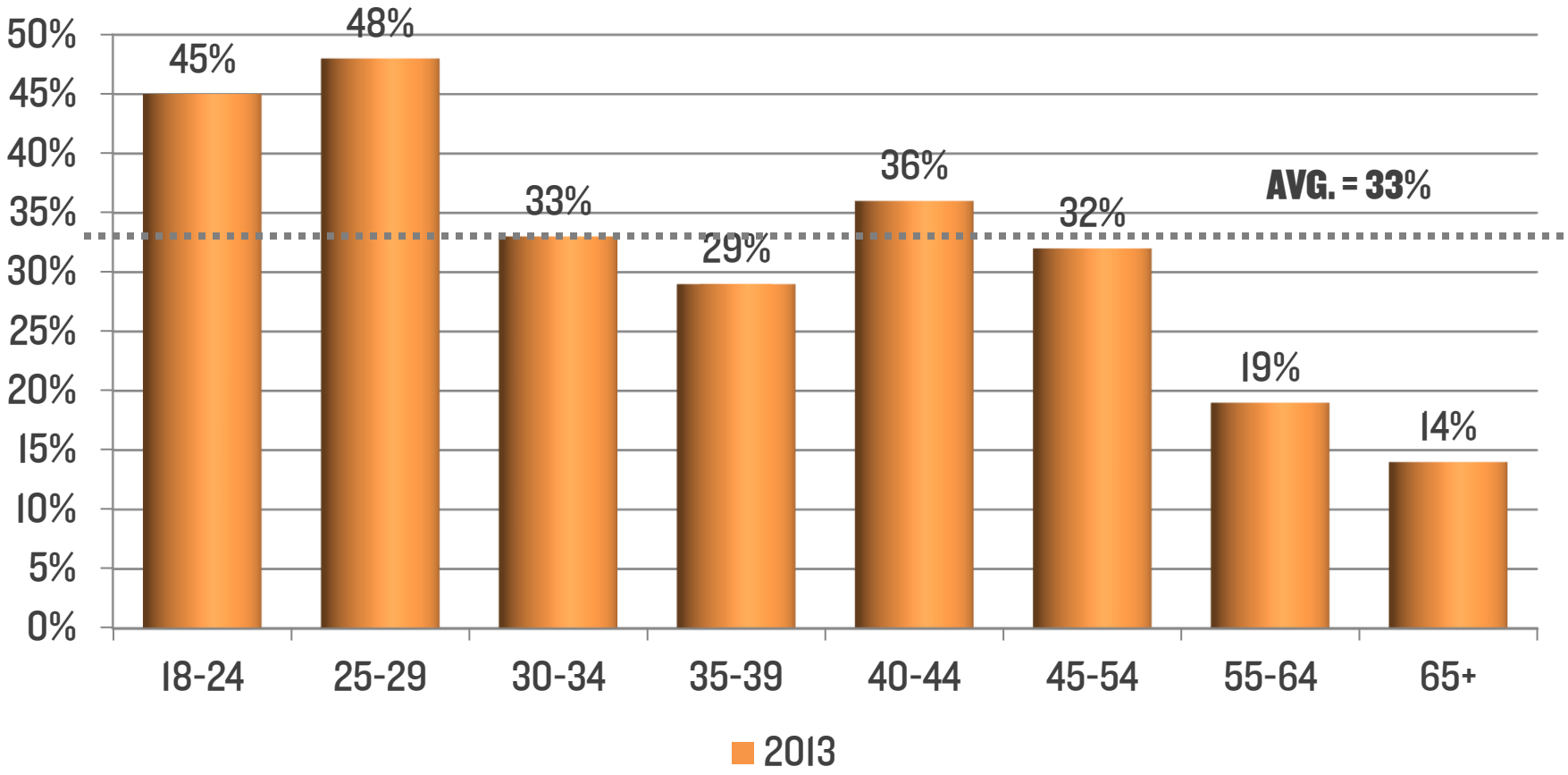
INTEREST IN EVENTS AND FESTIVALS DOWNTOWN SALT LAKE

One third of respondents (33%), rated their interest in entertainment in Downtown Salt Lake as an 8, 9, or 10.



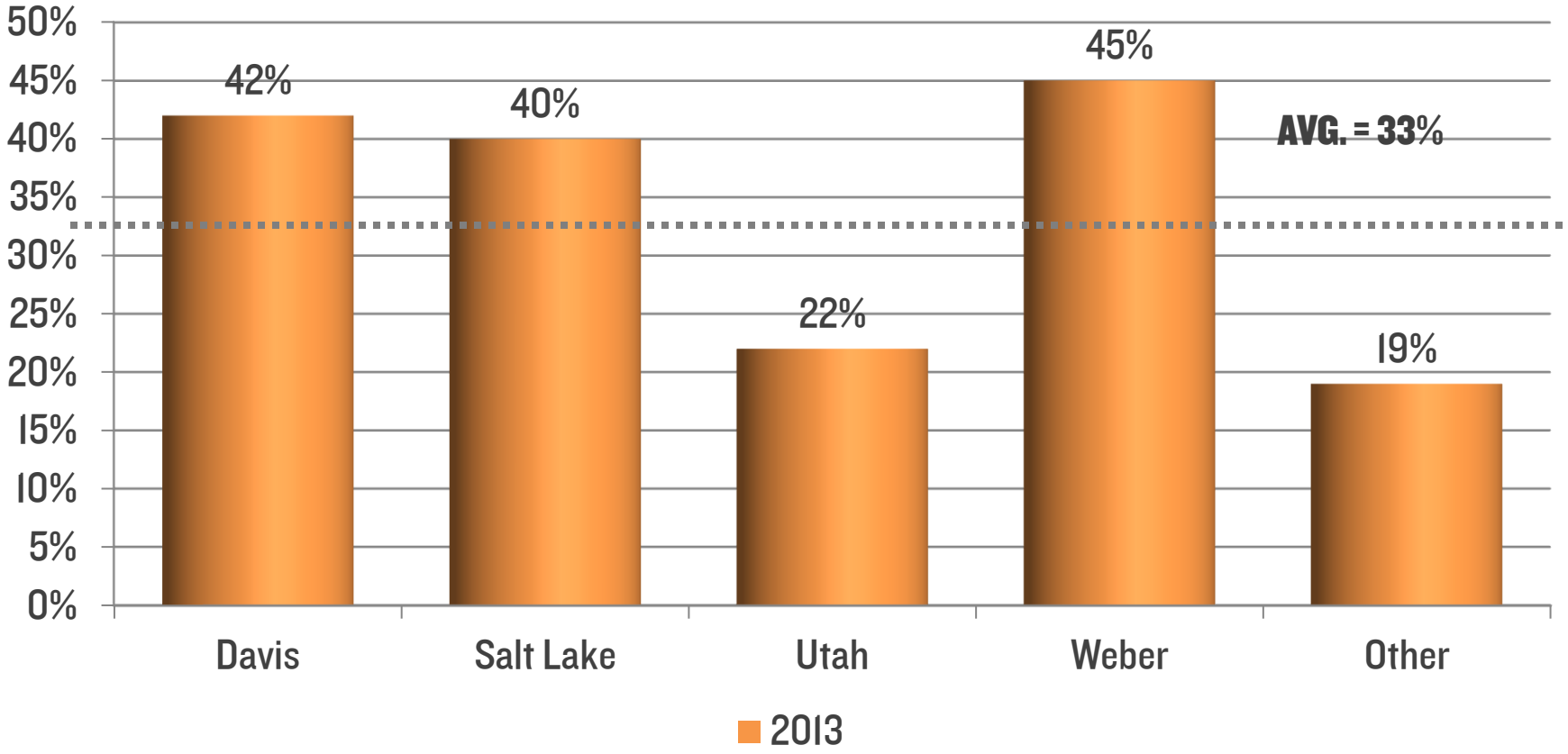
INTEREST IN EVENTS AND FESTIVALS DOWNTOWN SALT LAKE (BY AGE)

Interest in Downtown entertainment options is markedly highest among those respondents ages 18 – 29. Reported interest among this age group was an average of 46.5%, compared to the reported statewide baseline of 33%. Those aged 30 – 54 had somewhat similar interest in their age group, hovering around the average. The data seems to show distinct levels of interest in those aged younger than 30, 30 – 54 and 55+.



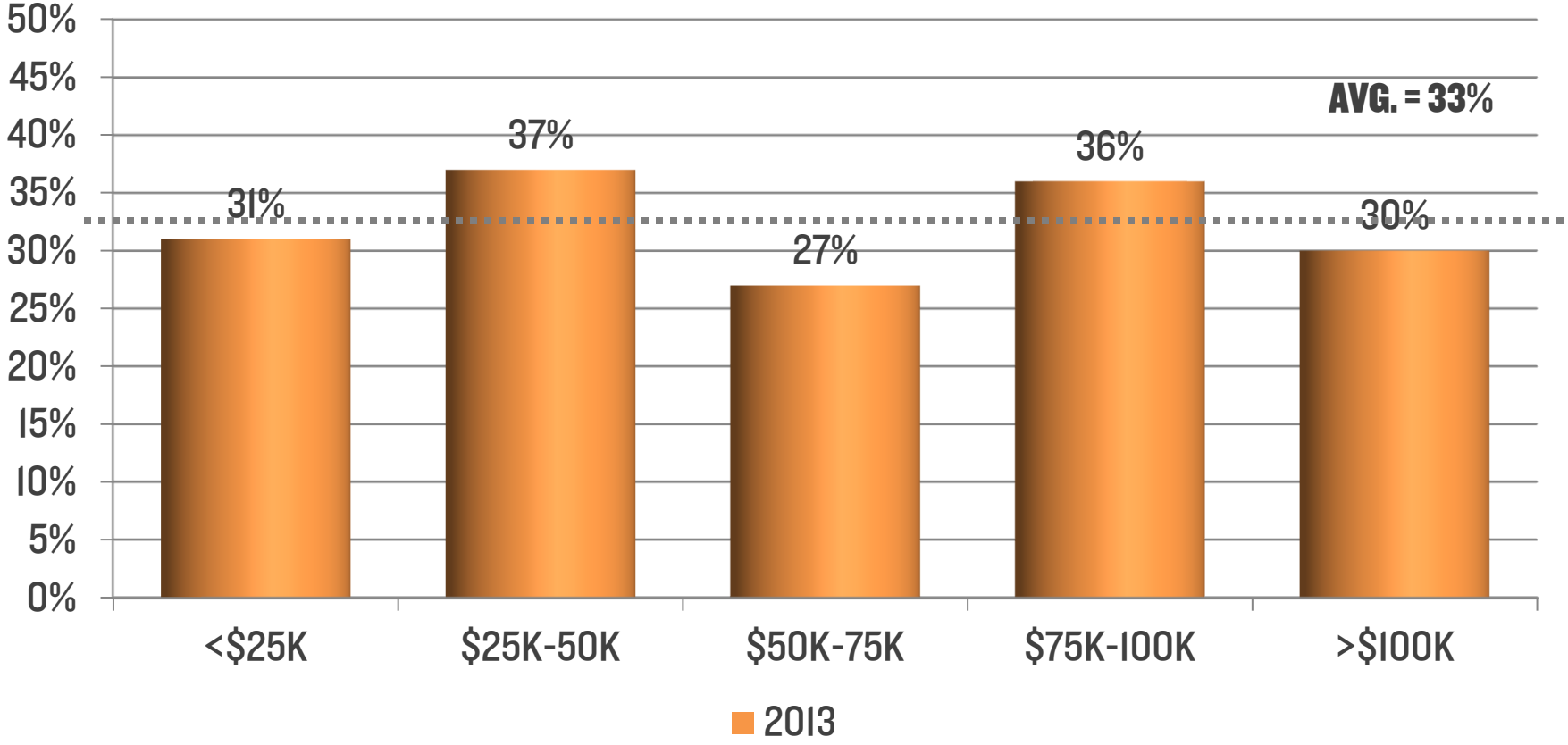
INTEREST IN EVENTS AND FESTIVALS DOWNTOWN SALT LAKE (BY COUNTY)

Weber, Davis and Salt Lake Counties had similar, high interest in attending events and festivals Downtown and were well above the statewide average of 33%. Utah and Other Counties were the opposite by having similar, low interest.



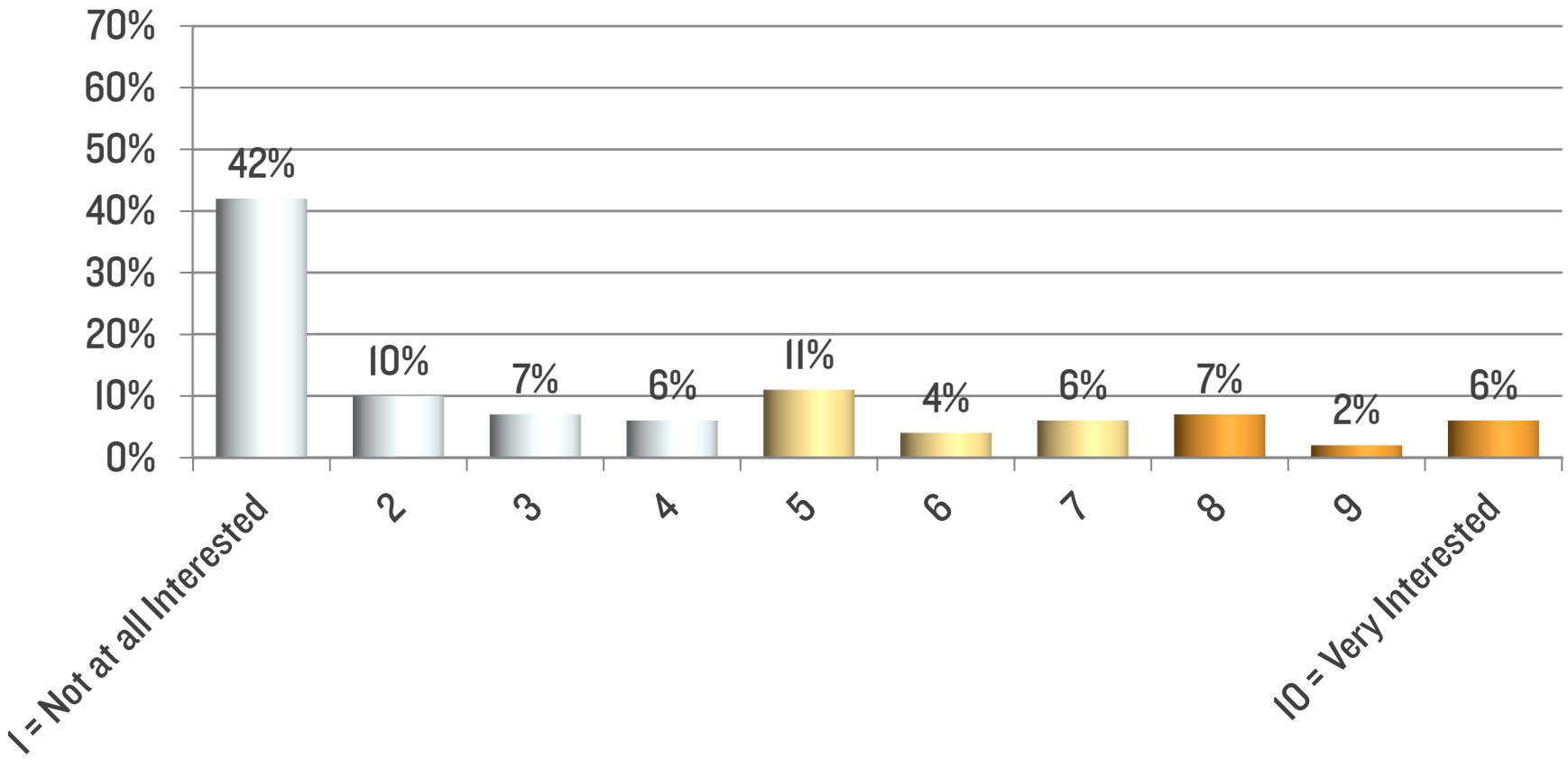
INTEREST IN EVENTS AND FESTIVALS DOWNTOWN SALT LAKE (BY INCOME)

Although there was deviation from the statewide average of 33%, no one household income level stood out over another. Those who made $25K–50K and $75K–100K were above average at 37% and 36%, respectively. $50K–75K had the least "high" interest at 27%.



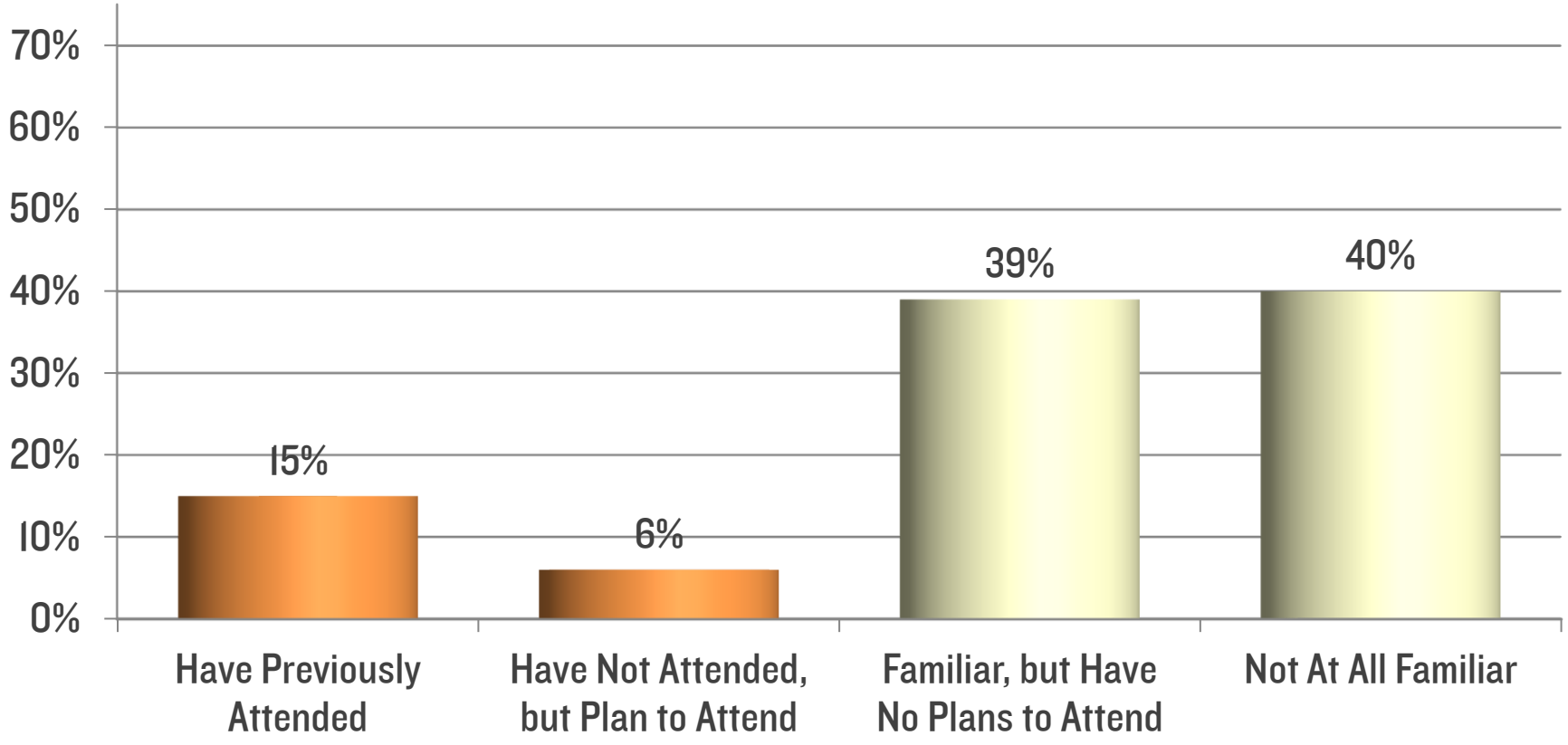
INTEREST IN NIGHTLIFE DOWNTOWN SALT LAKE

Compared to interest levels in other Downtown Salt Lake activities, Nightlife had the least amount of "Very Interested" for those who selected 8, 9 or 10. "Not Interested at All" was very high at 42%, with the total percentage of respondents selecting 1, 2, 3 or 4 at 65%.



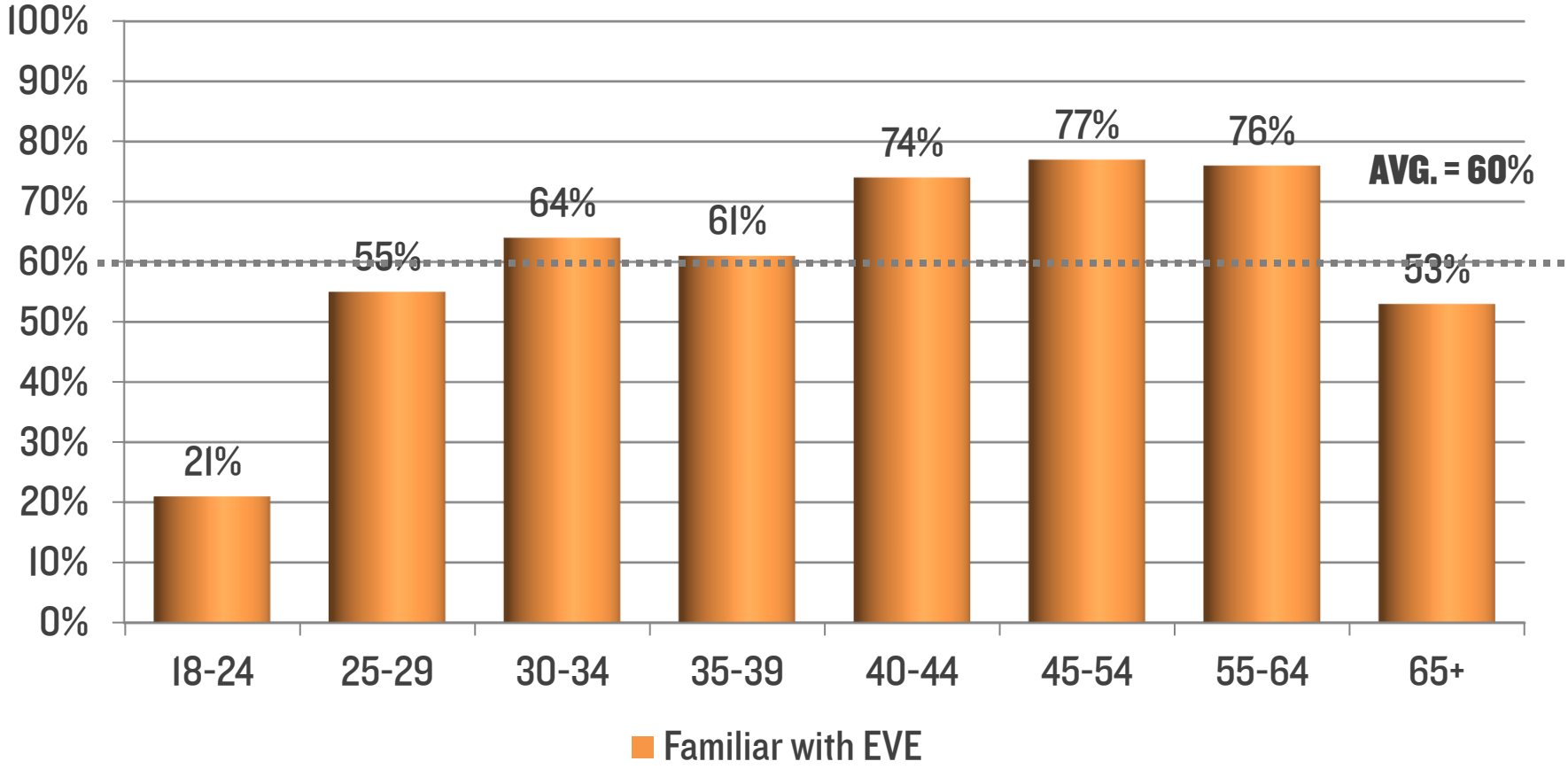
EVENT FAMILIARITY - EVE

Two in three respondents (60%) were familiar with EVE, however barely 1 in 5 (21%) had attended or planned to attend.



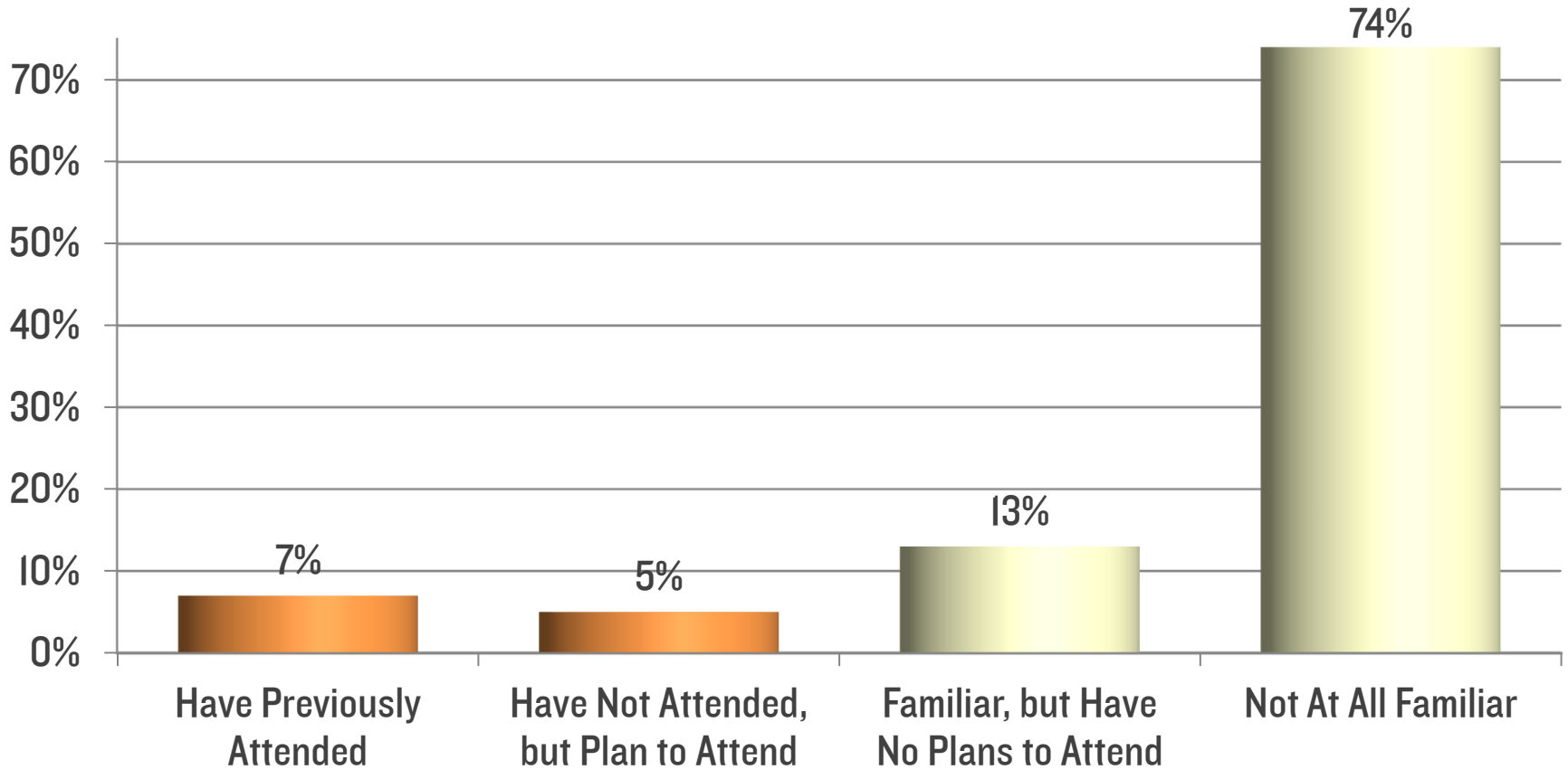
EVENT FAMILIARITY – EVE (BY AGE)

Familiarity of EVE increases steadily as age increases. Although EVE is promoted as a family friendly event, it is quite surprising at the low level of awareness with those aged 18 – 24. The data does seem to show that there is more awareness (and likely interest) in ages where a family with children is presented, meeting EVE's target audience.



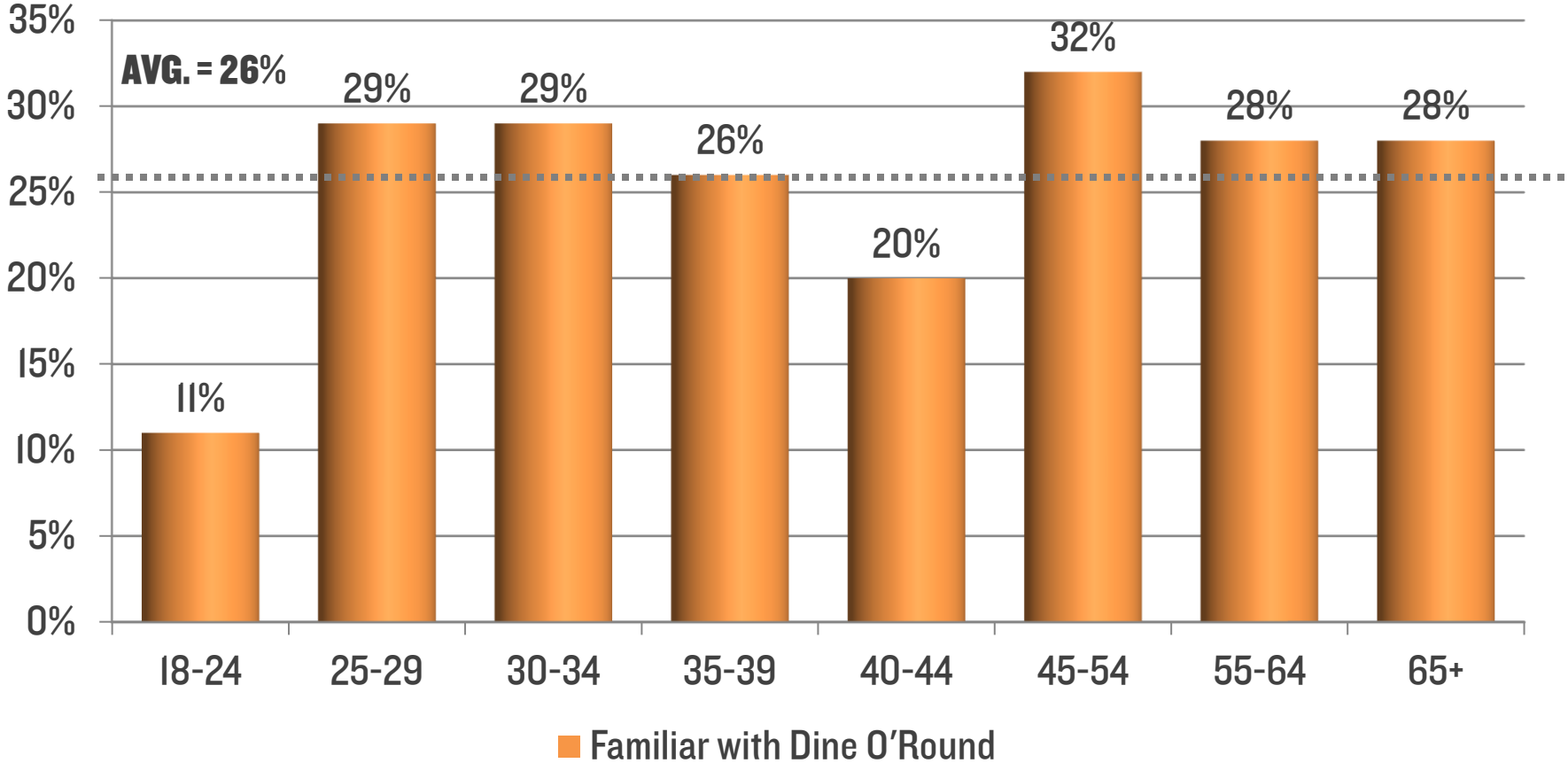
EVENT FAMILIARITY – DINE O'ROUND

1 in 4respondents (25%) were familiar with Dine O'Round, however only about 1 in 10 (12%) had attended or planned to attend. Three-quarters of those surveyed were not at all familiar with the event.



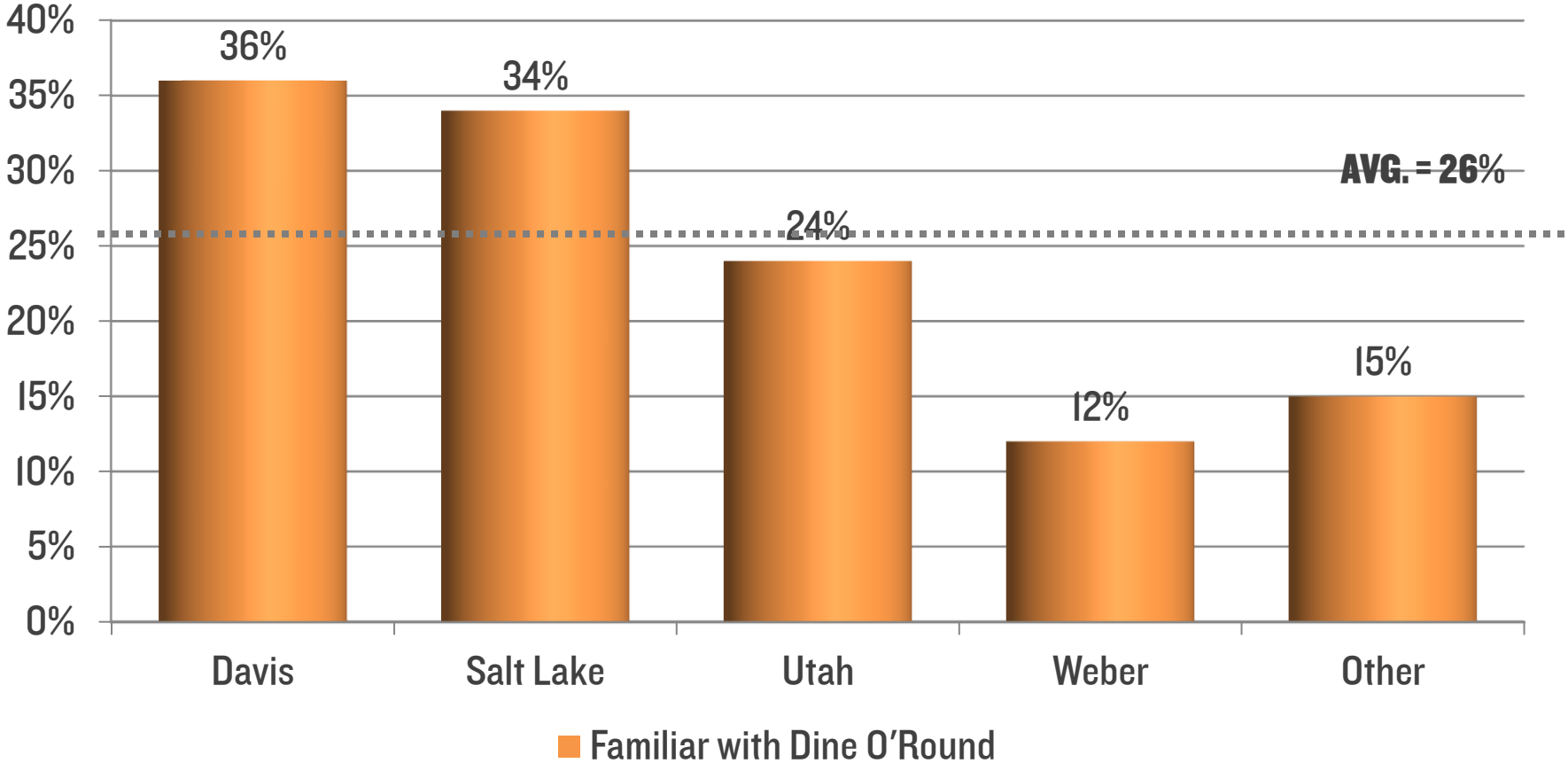
EVENT FAMILIARITY – DINE O'ROUND (BY AGE)

Familiarity of Dine O'Round based on age indicates those under the age of 25 have very low understanding of the event. All age groups above 25 seem to have similar familiarity of the event. Strangely, those age 40 – 44 had the lowest awareness while those 45 – 54 had higher awareness. This may be due to slight sample variation of the survey.



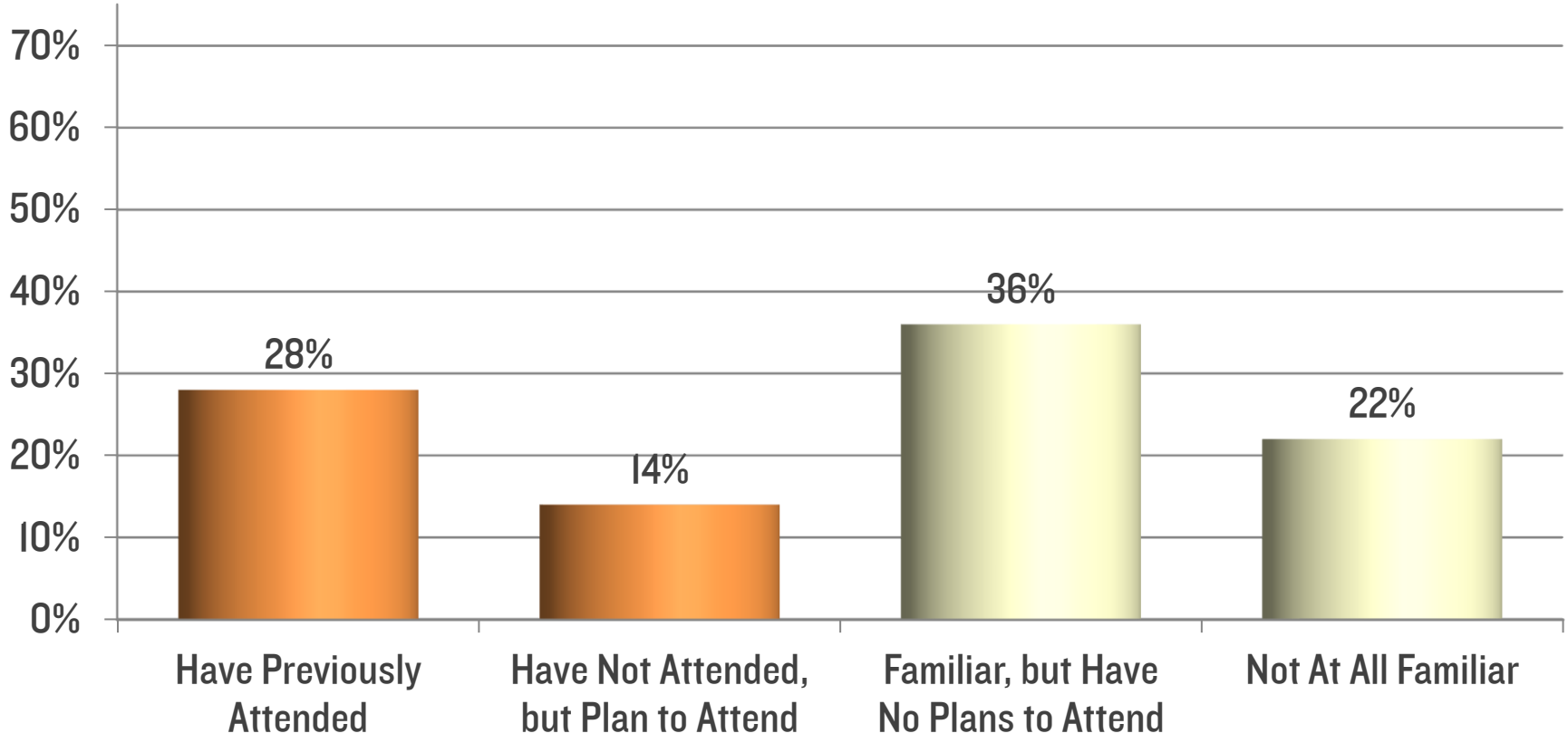
EVENT FAMILIARITY – DINE O'ROUND (BY COUNTY)

Unsurprisingly, respondents with relatively close proximity to Downtown had the most familiarity with Dine O'Round as both Davis and Salt Lake Counties had responses above the survey's average. Weber and Other Counties had very low familiarity, suggesting that knowledge of Dine O'Round isn't very far-reaching, geographically.



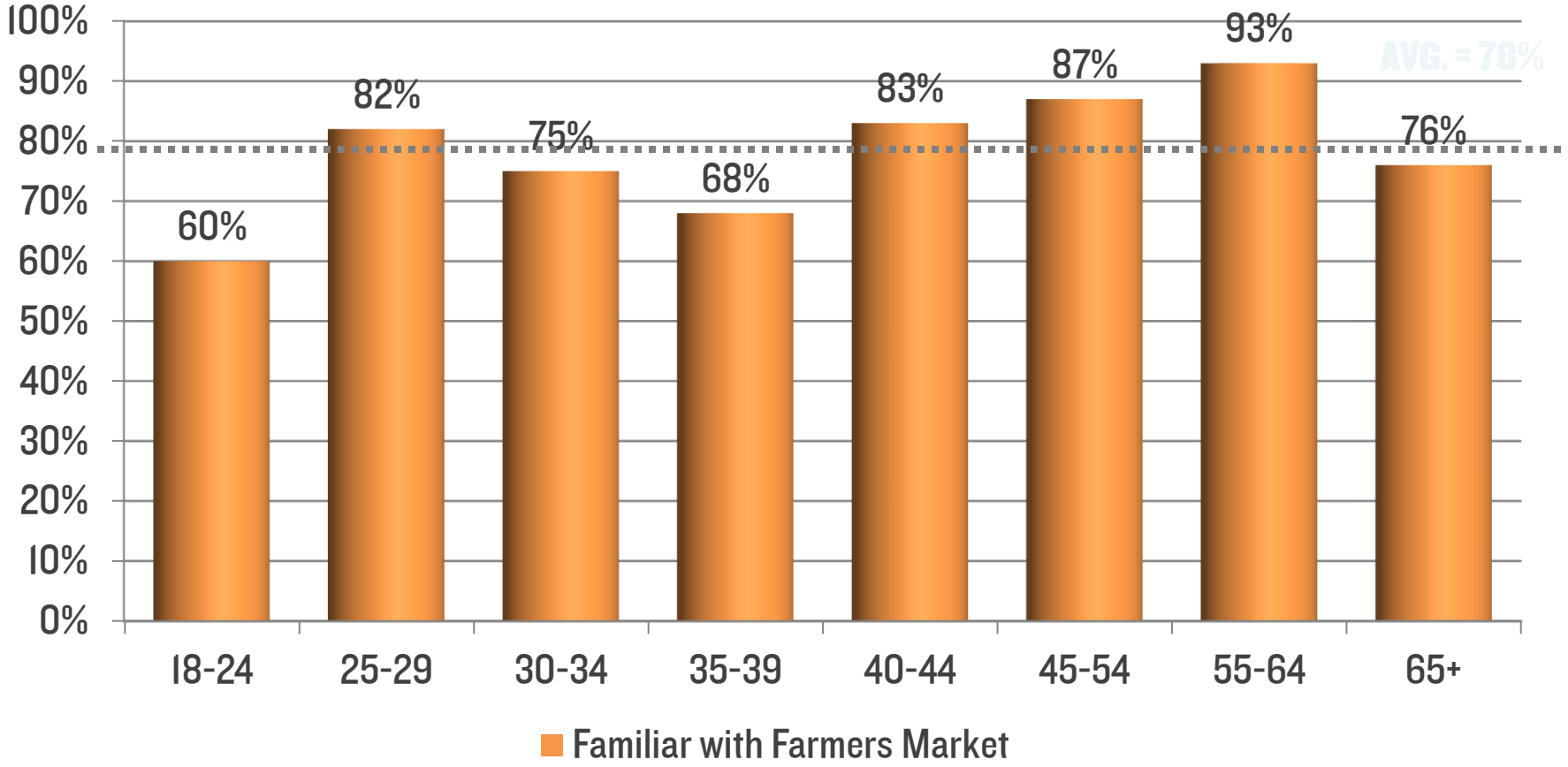
EVENT FAMILIARITY – PIONEER PARK FARMERS MARKET

Almost 4 in 5 respondents (78%) were familiar with the Farmers Market at Pioneer Park, with over a quarter (28%) having attended. The high awareness is very positive, along with the interest in attending. For the 36% who are familiar, but do not plan to attend the Farmers Market, hopefully the awareness will motivate them to attend a farmers market closer to where they live or work.



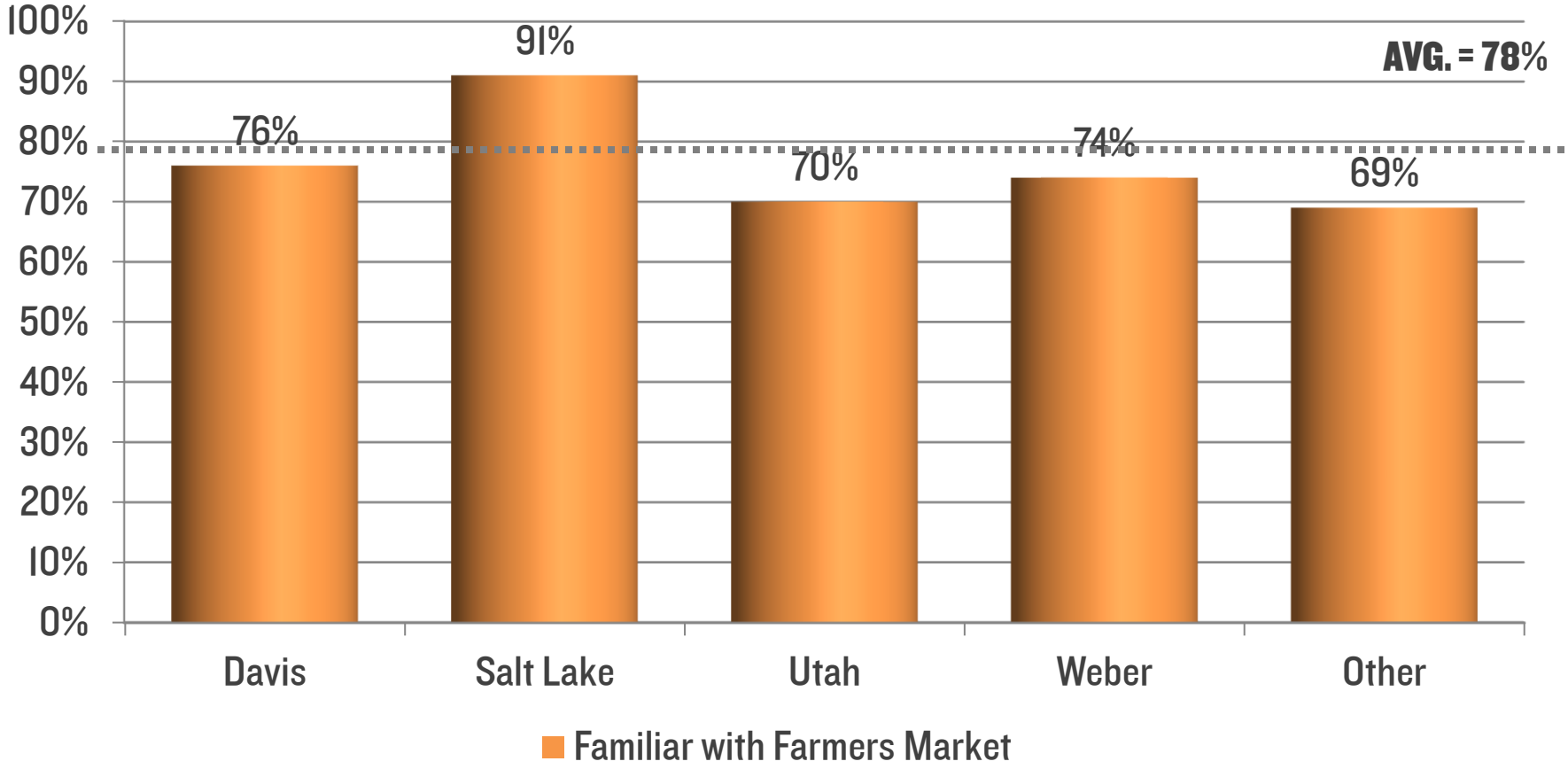
EVENT FAMILIARITY – PIONEER PARK FARMERS MARKET (BY AGE)

Familiarity with the Farmers Market seems to be highest with those over the age of 40. A shocking 93% of respondents aged 55 – 64 were familiar with the market. There does seem to be opportunity for more awareness with the 18 – 24 age group.



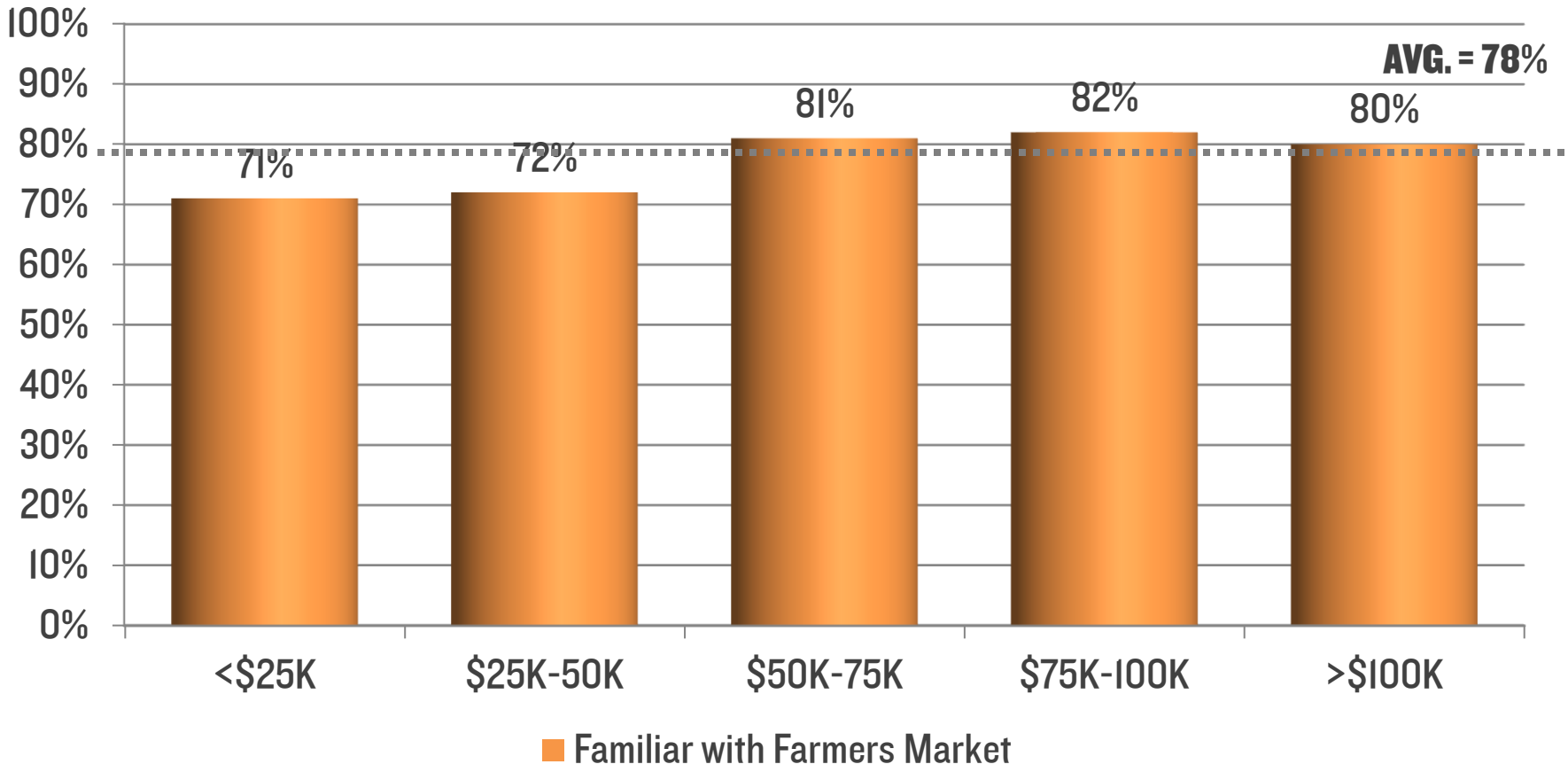
EVENT FAMILIARITY – PIONEER PARK FARMERS MARKET (BY COUNTY)

Breaking out by County, we can see that Salt Lake County has a very high rate of awareness at 91%, while all other Counties had roughly 70% of respondents indicating familiarity with the Farmers Market. While the average familiarity of 78% is good, the 20% drop outside of Salt Lake County indicates that the geographic reach of the event could be improved.



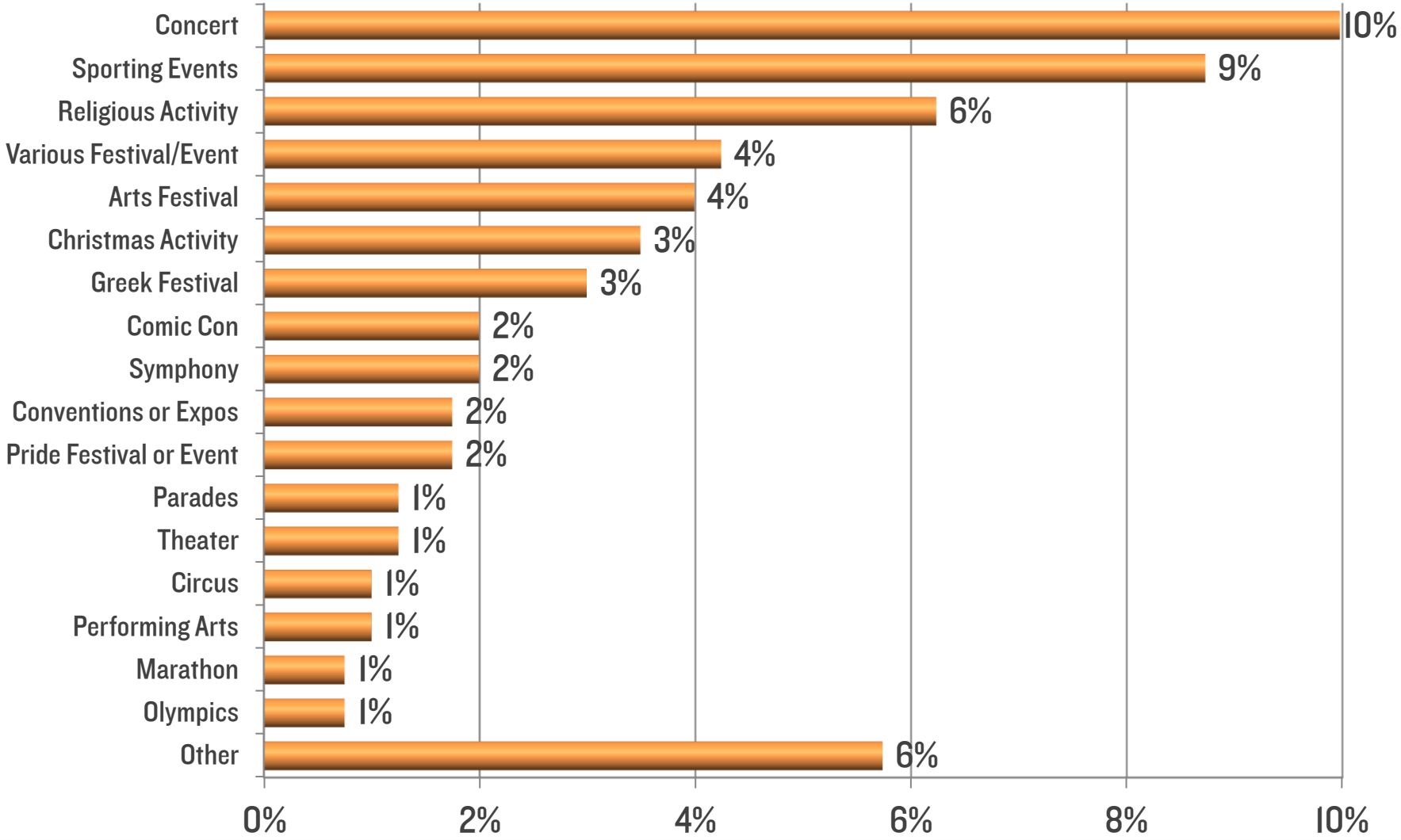
EVENT FAMILIARITY – PIONEER PARK FARMERS MARKET (BY INCOME)

Staying true to income's relationship with age, there was a slight increase in awareness with those who make at least $50K per year. Other than that small bump, familiarity with the Farmers Market seems to be fairly equal among household income brackets.



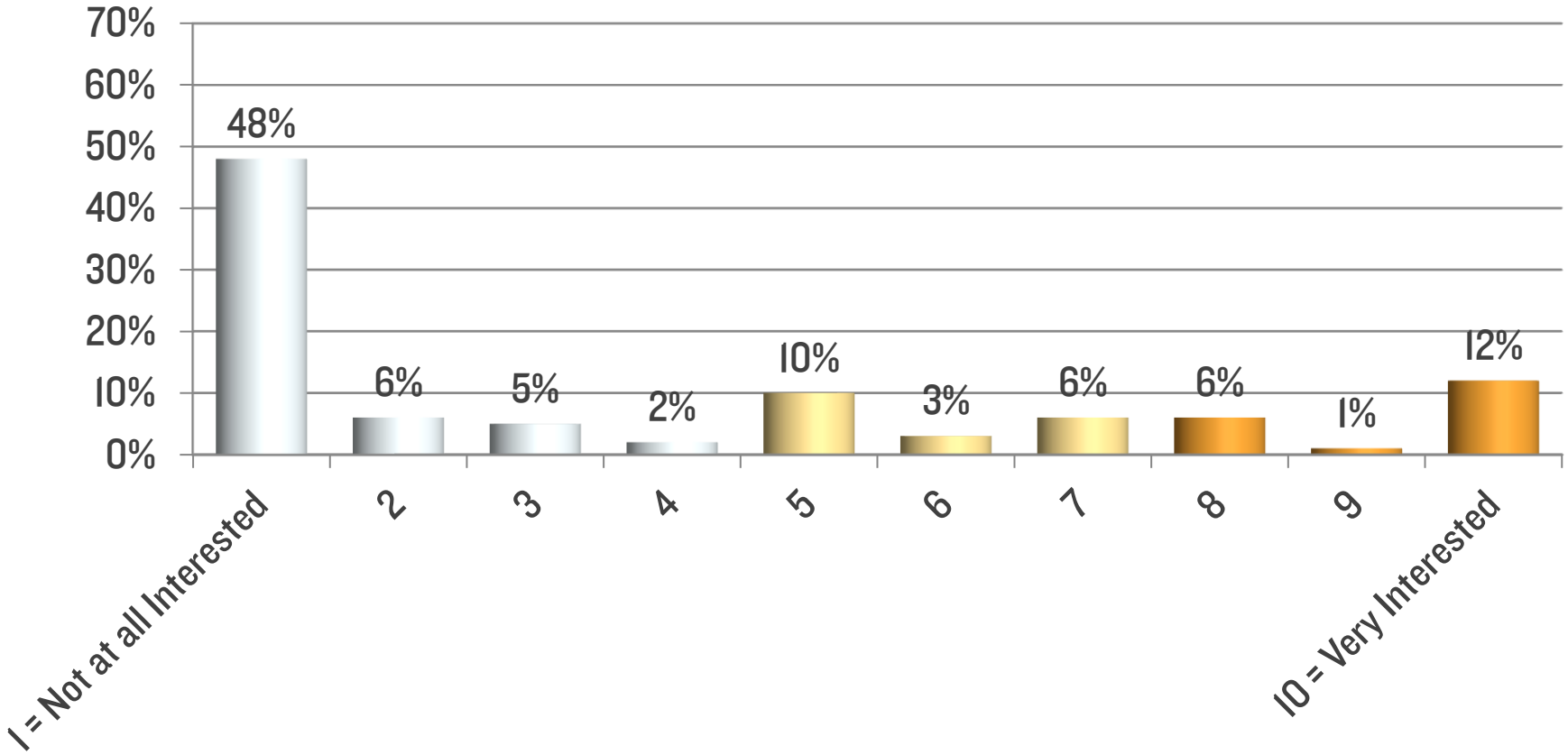
OTHER EVENTS ATTENDED

For those who said they had attended an "Other" event Downtown, Concerts and Sporting Events were the two most mentioned.



INTEREST IN WORKING DOWNTOWN SALT LAKE

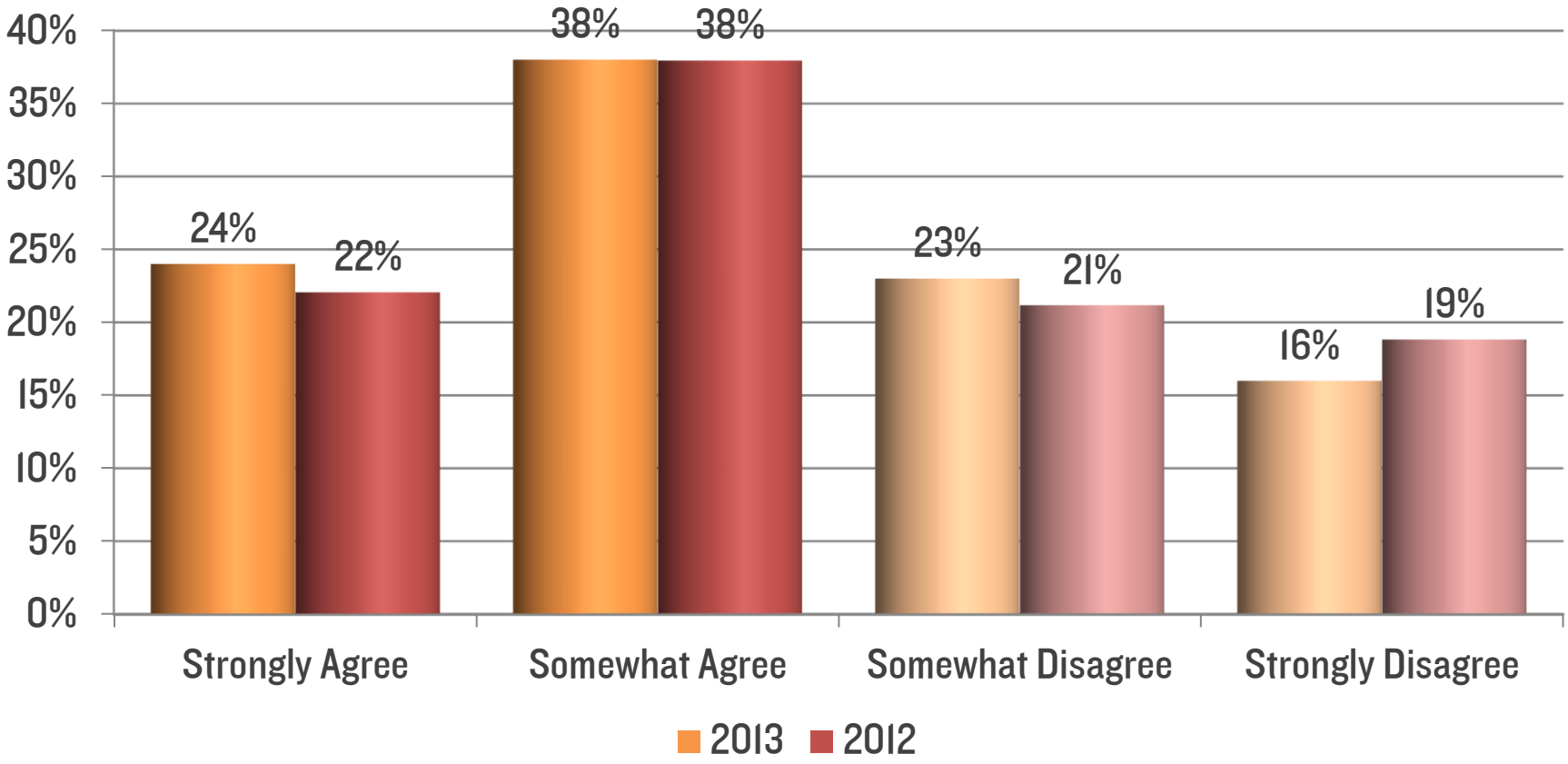
Nearly 1 in 5 respondents (19%) indicated an 8, 9 or 10 for being very interested in working in Downtown Salt Lake. 3 in 5 respondents (61%) had very low interest, with almost half (48%) not having any interest.



PARKING DOWNTOWN

AVAILABILITY OF DOWNTOWN PARKING - YOY

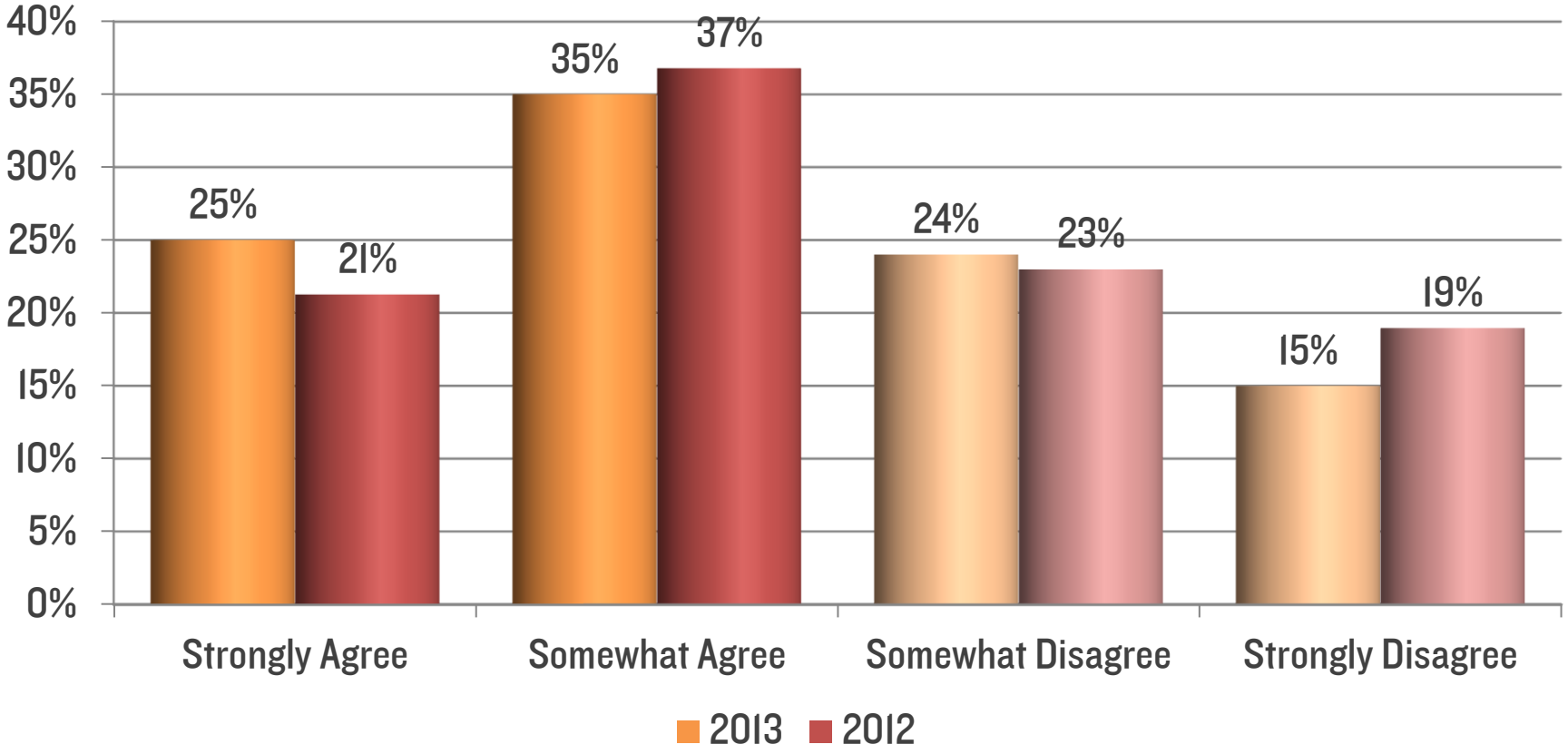
When compared to 2012, the respondents' sentiment toward the availability of parking increased very slightly in 2013. However, it should be noted that this change is within the margin of error.



NOTE: Excludes all respondents who answered "don't know" to this question.

CONVENIENCE OF DOWNTOWN PARKING

When compared to 2012's responses, it appears that there is movement toward agreeing that *convenience* of parking Downtown is improving.

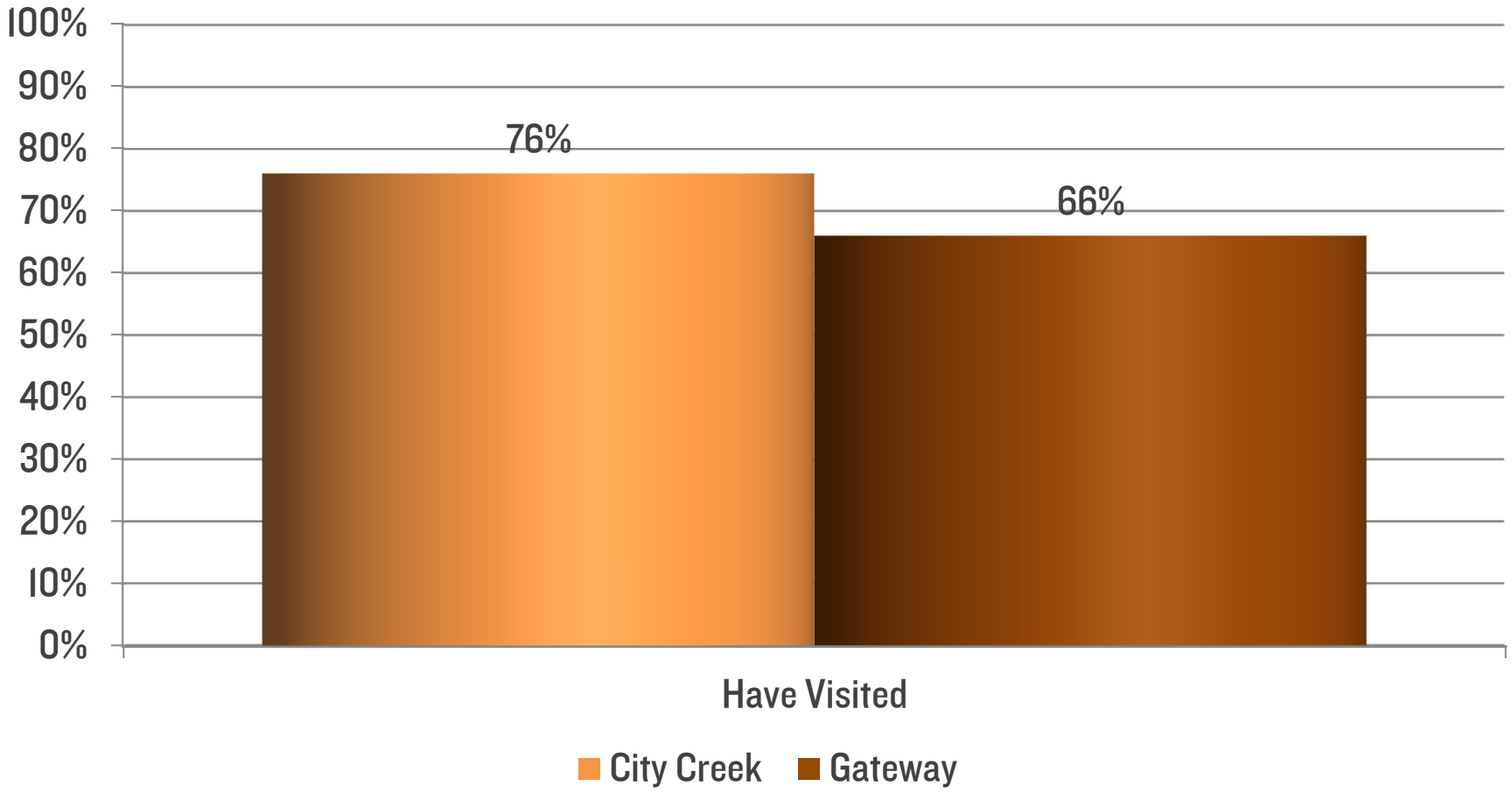


NOTE: Excludes respondents who answered "don't know" to this question.

DOWNTOWN MALLS

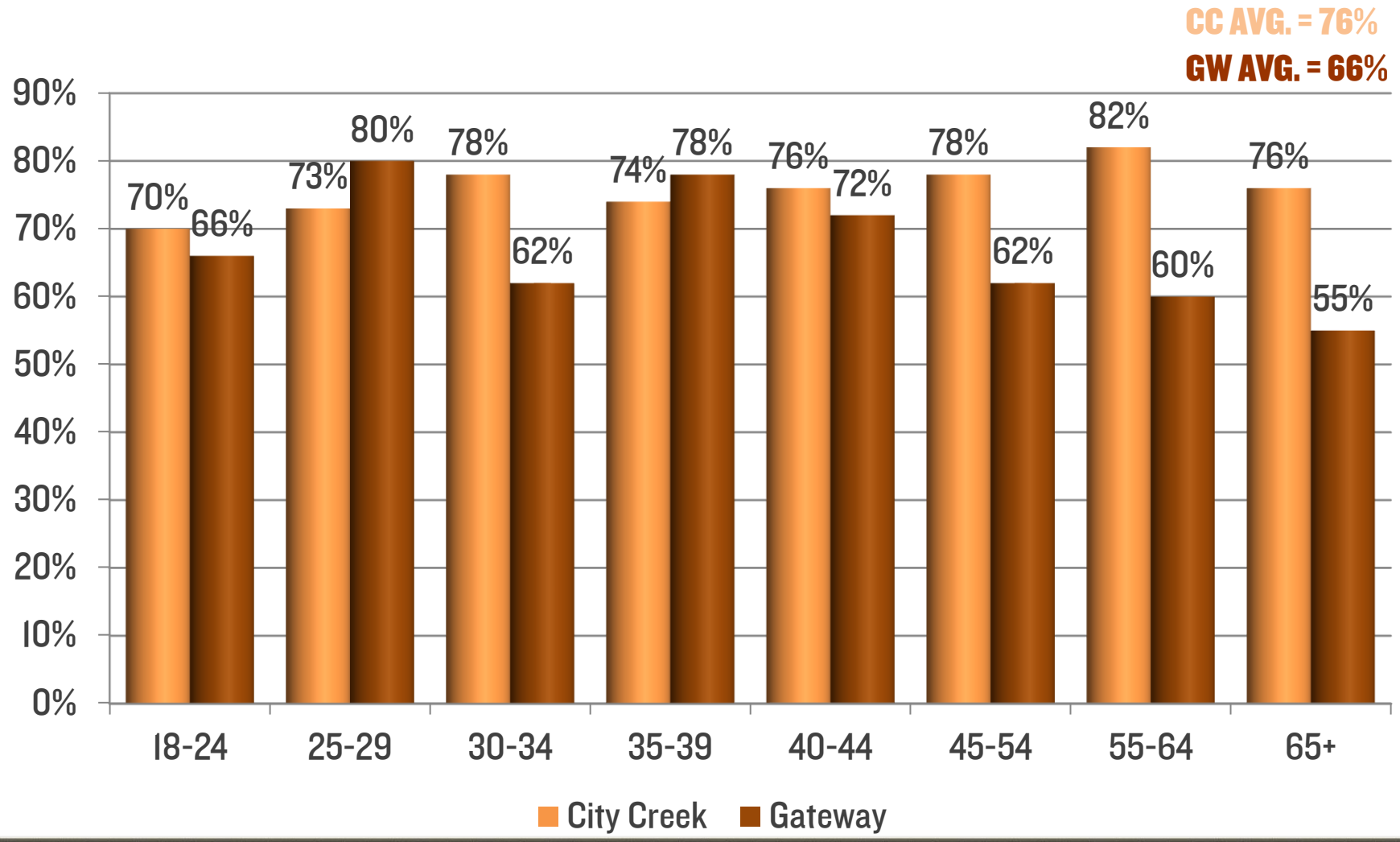
DOWNTOWN MALL VISITORS– LAST 12 MONTHS

When comparing respondents' visits to malls Downtown, 3 in 4 (76%) had visited City Creek, while only two-thirds (66%) visited Gateway.



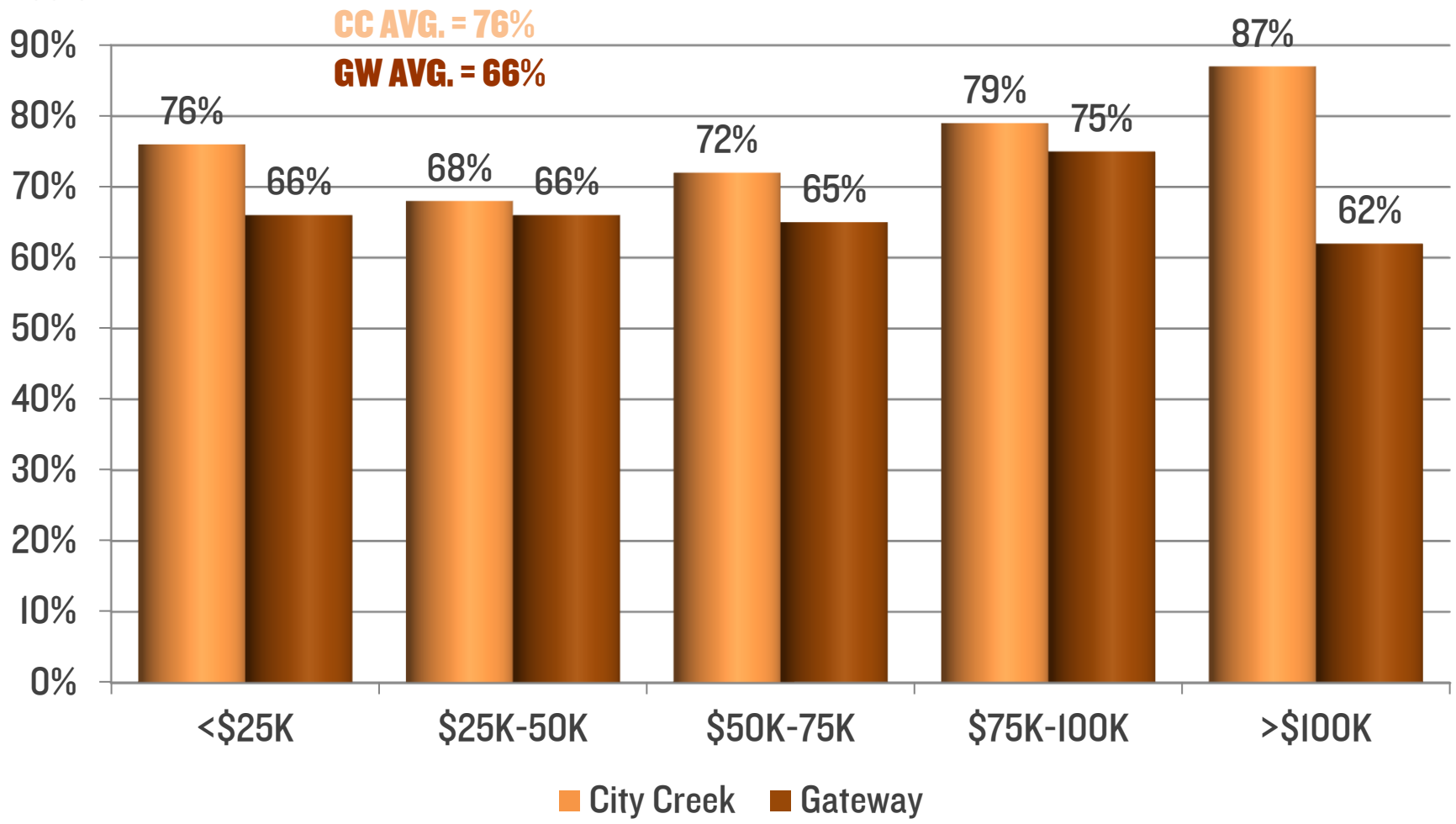
VISITORS TO DOWNTOWN MALLS (BY AGE)

City Creek had more visits by all age groups, except 25 – 29 and 35 – 39. The largest gaps occurred in the 30 – 34 and 45 + ages.



VISITORS TO DOWNTOWN MALLS (BY INCOME)

Respondents who visited Gateway with HHI of <$25K – 75K were right on its average, while those with $75K – 100K visited slightly more at 75%. Only City Creek respondents with HHI of <$25K were at its average of 76%. All other income levels were above or below.

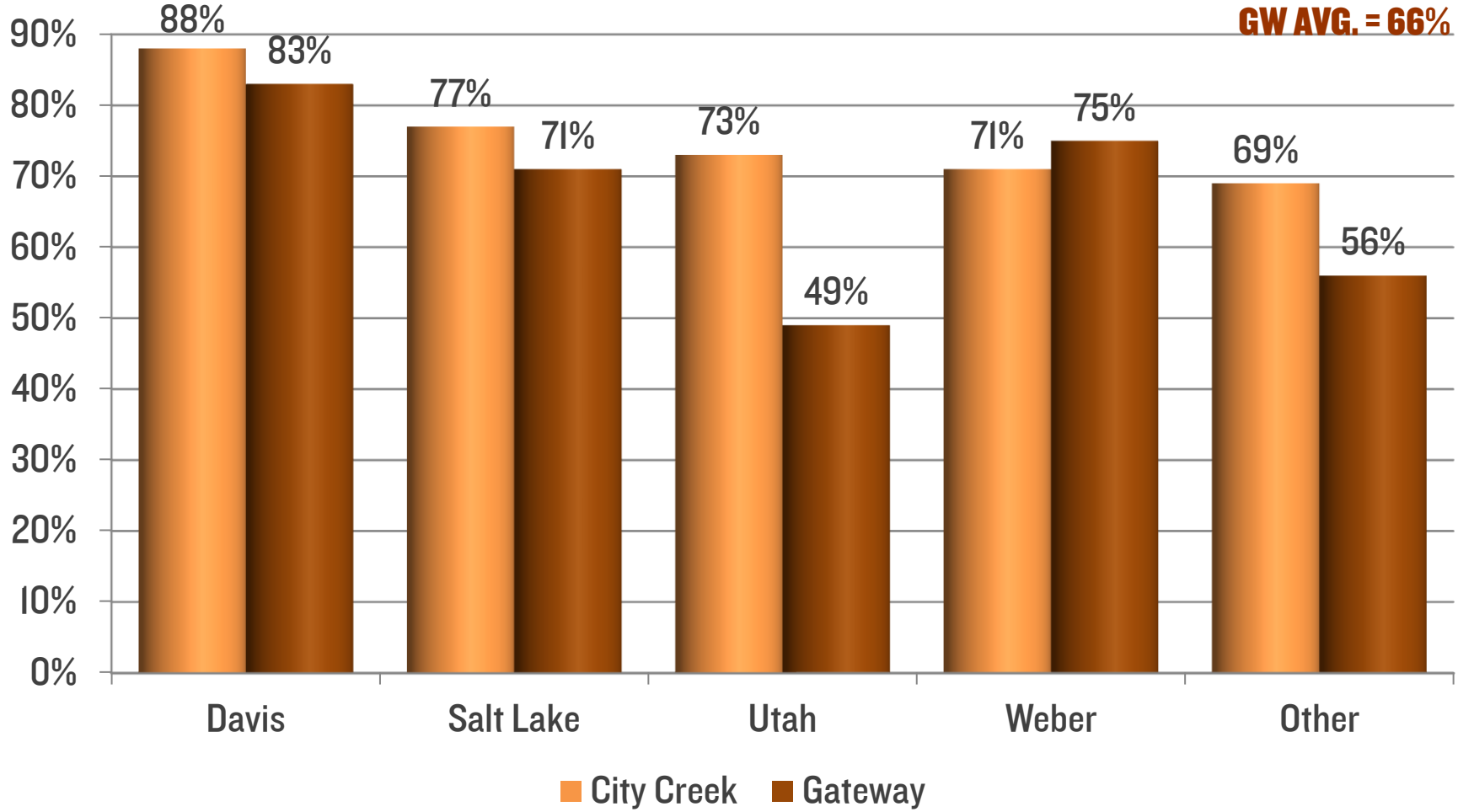


VISITORS TO DOWNTOWN MALLS (BY COUNTY)

Respondents who visited City Creek or Gateway from Davis and Salt Lake Counties trended higher than their statewide averages. Weber County had more visits to Gateway compared to City Creek. Utah and Other Counties had the largest discrepancies between both malls and their statewide averages.

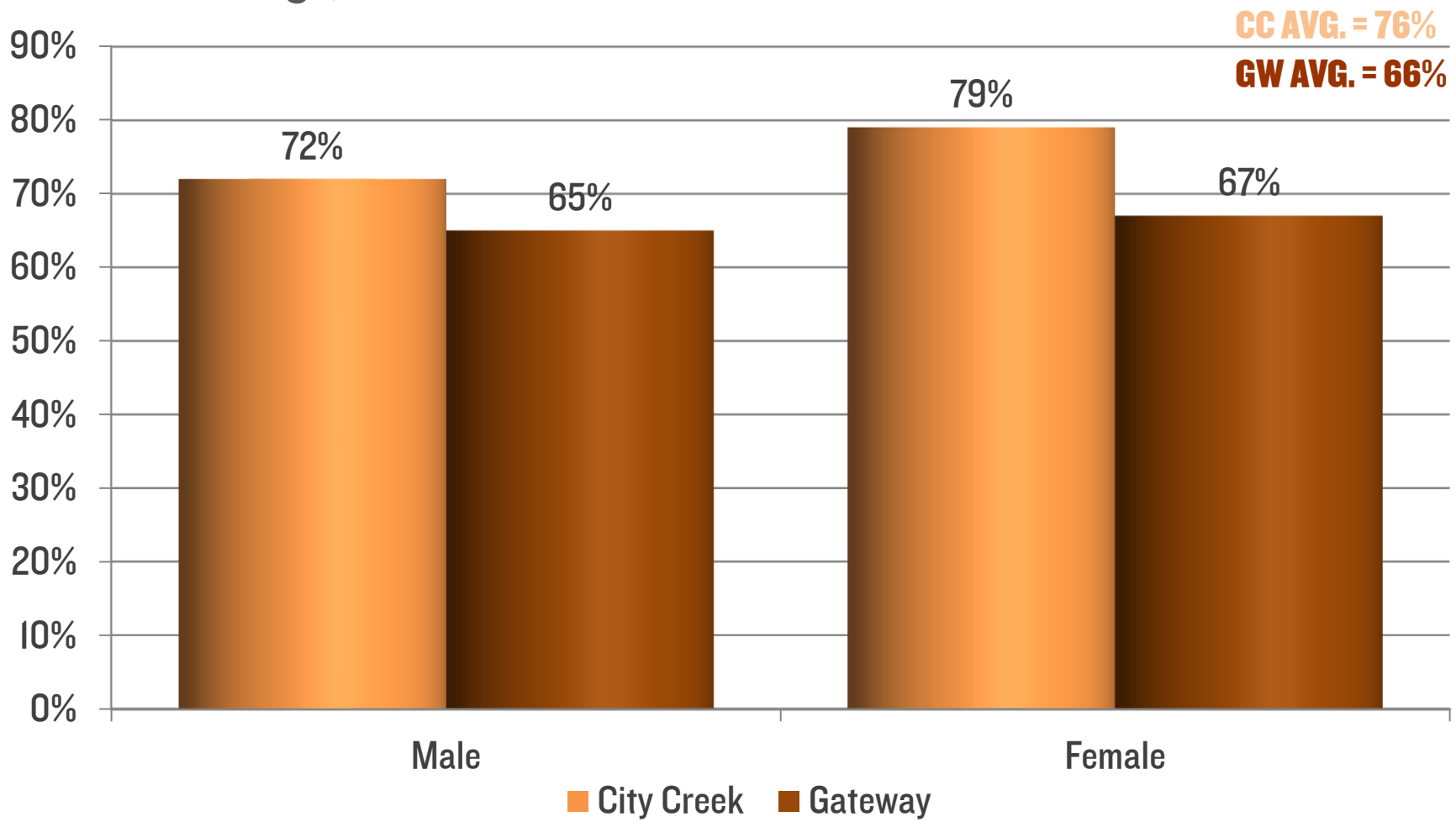
CC AVG. = 76%

GW AVG. = 66%



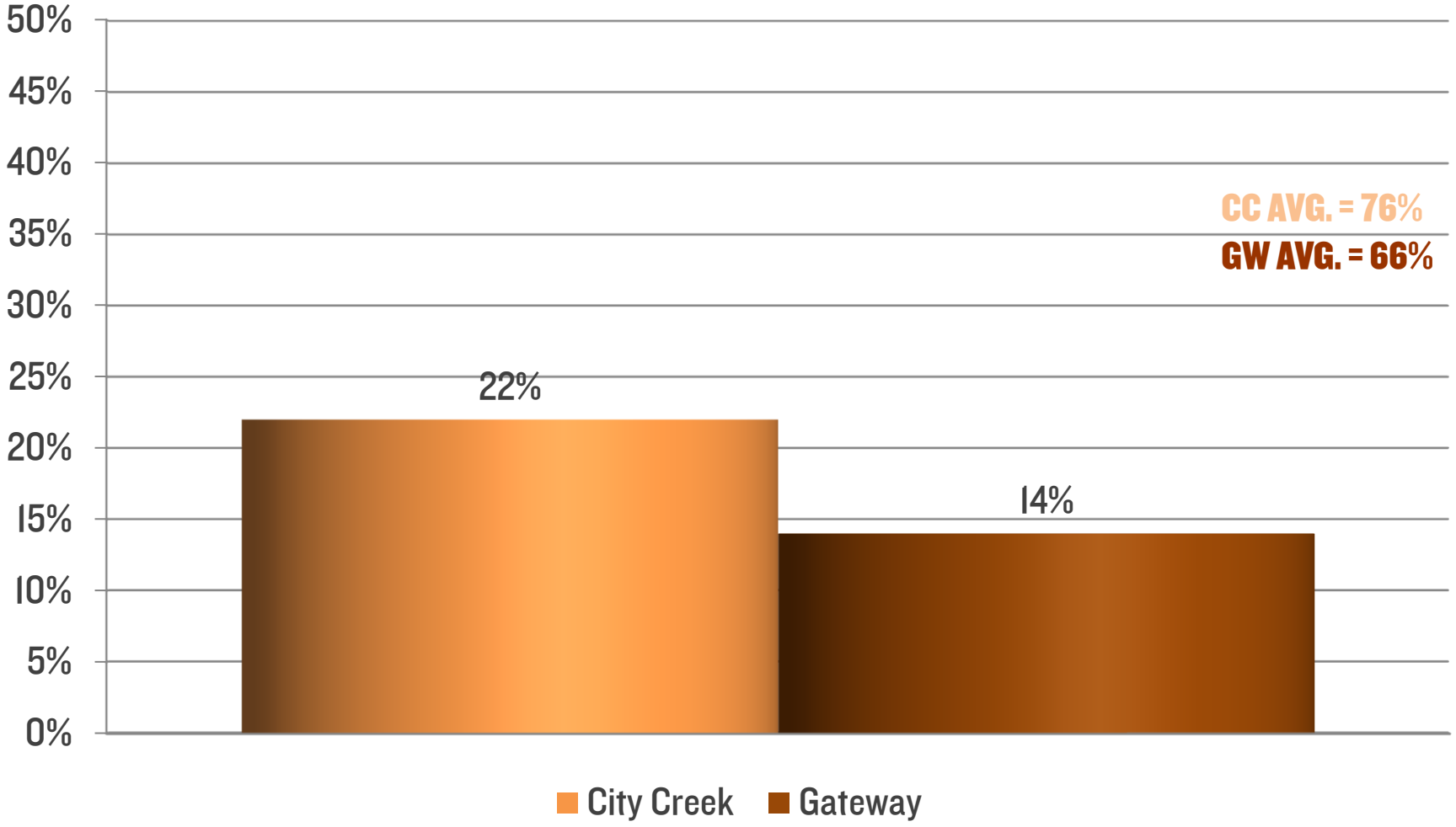
VISITORS TO CITY CREEK (BY GENDER)

Male and female respondents who visited Gateway were nearly equal to the statewide average of 66%. Slightly more females visited City Creek than its average, while less males visited.



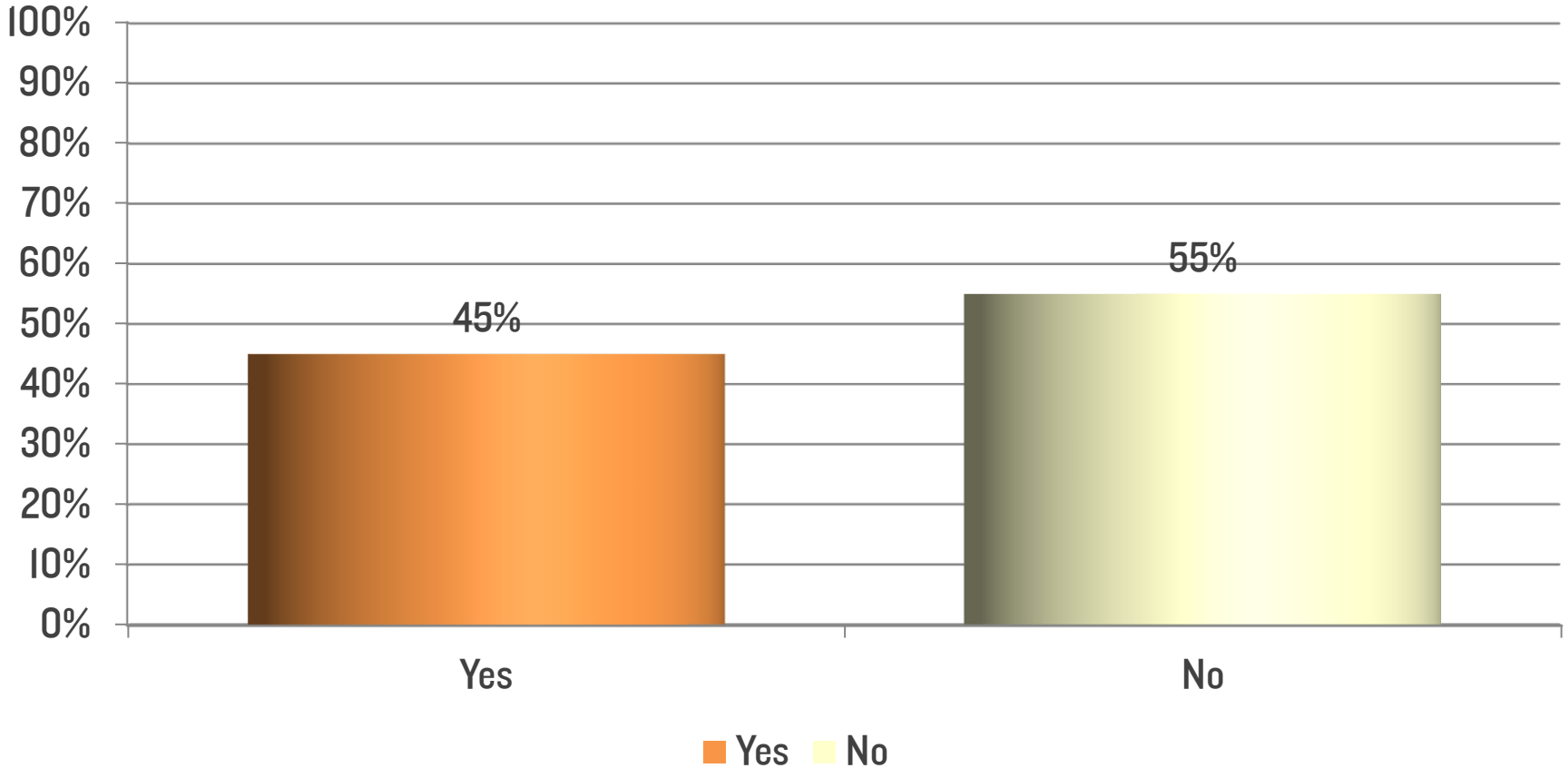
VISITING DOWNTOWN MALLS ONLY TO USE PARKING

Twenty-nine percent (22% of 76%) of respondents who visited City Creek did so only to use their parking. This compares to only 21% (14% of 66%) of Gateway respondents who visited for the same reason.



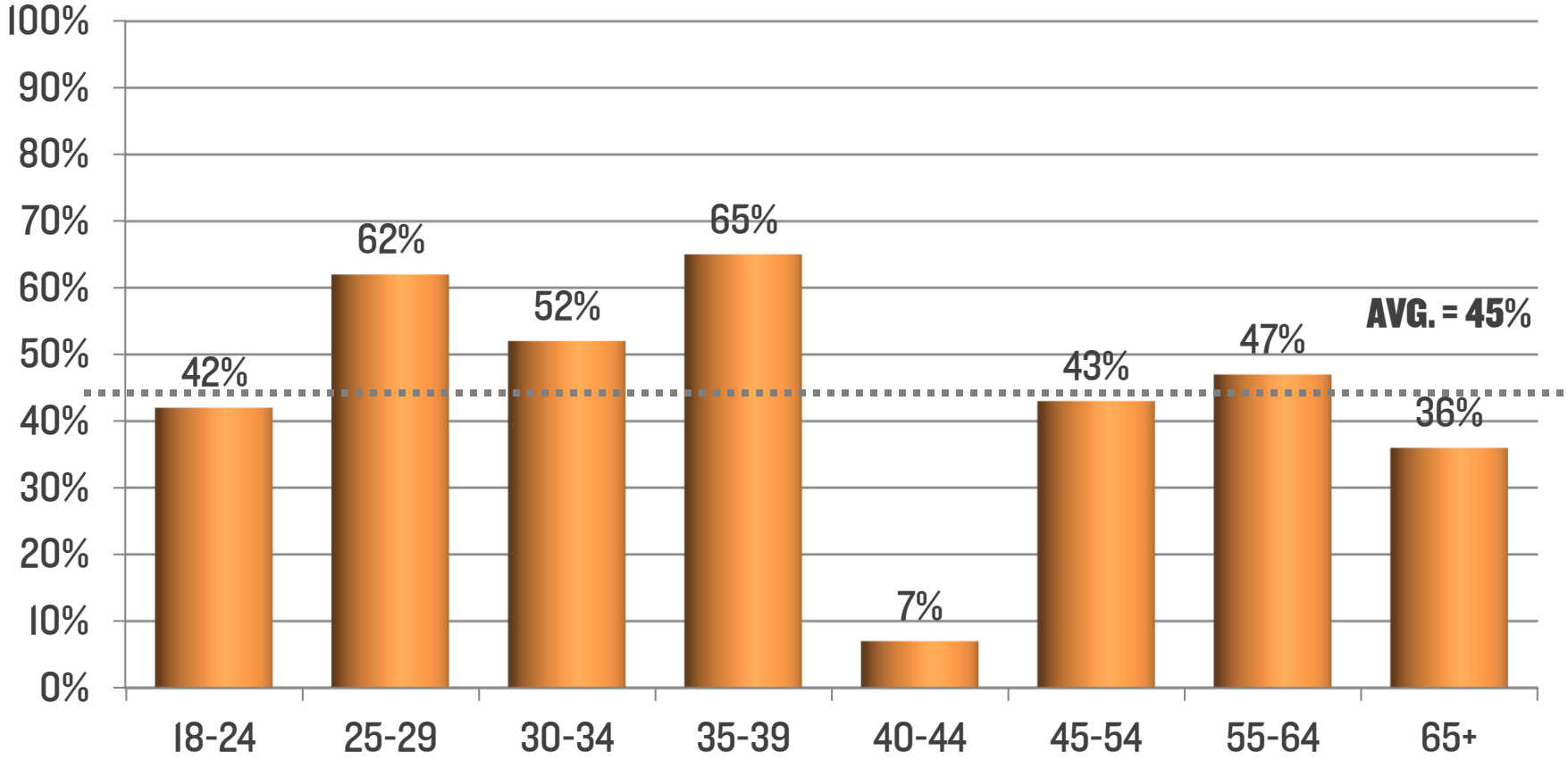
VISITORS EXPLORING BROADER DOWNTOWN

Among those respondents who indicated they had been Downtown at least once in the last twelve months, 45% said they had dined at or shopped at least one location that they have never previously visited in Downtown Salt Lake (not located at City Creek Center). This is the same percentage as 2012.



VISITORS EXPLORING BROADER DOWNTOWN – (BY AGE)

Respondents aged 25 – 39 were well above the statewide average of 45% exploring broader downtown. Ages 18 – 24 and 45 – 54 were near the average, while 40 – 44 and over 65 were well under the average.



STRATEGIC RECOMMENDATIONS

STRATEGIC RECOMMENDATIONS

- Overall perceptions and interactions with Downtown Salt Lake seem to be improving or staying the same. With City Creek and other large construction projects being finished over the past two years, visitors both close and far continue to visit.
- Weber and Davis Counties have seen marked growth and interest in visiting Downtown over the past 6 – 12 months. With public transit and parking improving, visitors seem more willing to travel for entertainment.
- Utah County seemed to move the opposite way and visit Downtown less. With more shopping and entertainment options in Utah County and around Point of the Mountain, residents may see less of a need to make the drive to Salt Lake City.

STRATEGIC RECOMMENDATIONS

- Two age groups stood out amongst respondents: 18 – 29 and 55 – 64. Both seem to have above average interest in entertainment or nightlife Downtown.
- Household income seemed to affect interest or perceptions of Downtown Salt Lake and the activities it offers.
- As the Downtown Alliance moves forward in promoting events, it should leverage the positive improvements that allow for easier access to Downtown. This is especially true with Salt Lake, Davis and Weber Counties' residents.
- Events, Activities, and Promotions should be promoted across a variety of marketing channels, taking into account the channels that the primary age target is most likely to use when gathering information.

STRATEGIC RECOMMENDATIONS

- Events and activities that appeal to a broad audience or families will likely draw the largest number of people. This was seen in the age groups where those above the age of 29 attended events with more mass appeal.
- EVE and the Farmers Market are ideal events for these groups.
- Ages under 29 are more interested in nightlife and less family friendly events like concerts.

STRATEGIC RECOMMENDATIONS

- On average, there does not seem to be a high amount of interest in living Downtown.
- Those that would consider it were most interested in being close to work, Downtown entertainment and “city life.”
- If Salt Lake wants to increase those people who live downtown, ideally they would want to target those people who currently work there or visit frequently for entertainment.

STRATEGIC RECOMMENDATIONS

- Although parking is still perceived as an issue and deterrent, it is much less so than in previous years. Visitors seem to find parking more accessible and convenient.
- There is high awareness of homelessness and panhandling in Downtown Salt Lake. Especially around City Creek, Pioneer Park and Gateway. However, they do not seem to be a large deterrent to visitors.
- Very few respondents had serious concerns with the homelessness involving violence, drugs, etc.
- There is room for improvement to help visitors feel more at ease Downtown with less panhandling. However, most people seem to accept it as a part of the Downtown culture.

STRATEGIC RECOMMENDATIONS

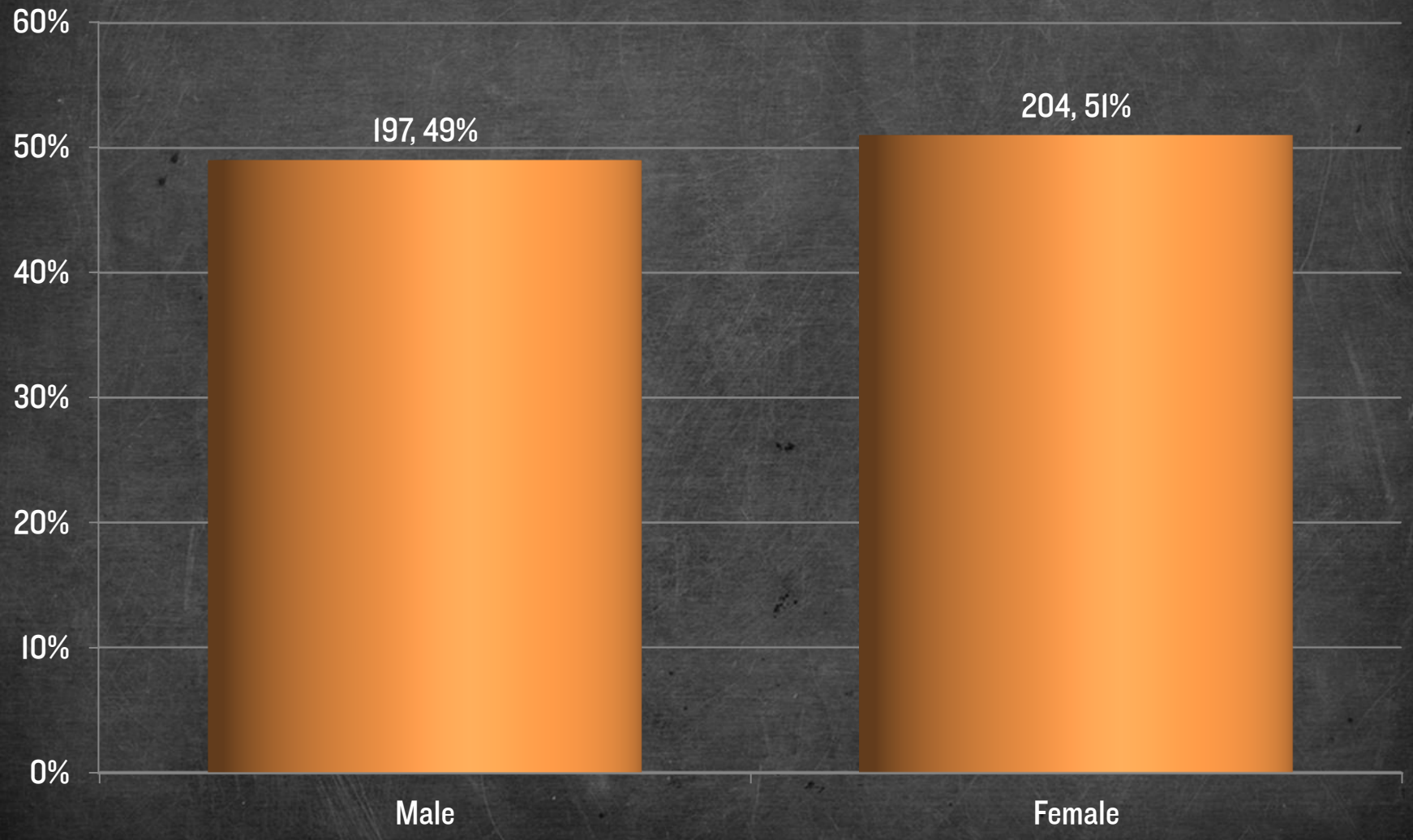
- City Creek Center is still continuing to have more visitors than Gateway. However, the gap is much less than last year and there does seem to be interest in both malls.
- A larger portion of respondents visited City Creek just for parking than they did Gateway.
- City Creek seems to be more of a central hub for Downtown access, which may be a reason why it sees more visitors than Gateway.
- Both malls should continue to be promoted as destinations for Downtown Salt Lake.

APPENDIX

DEMOGRAPHICS

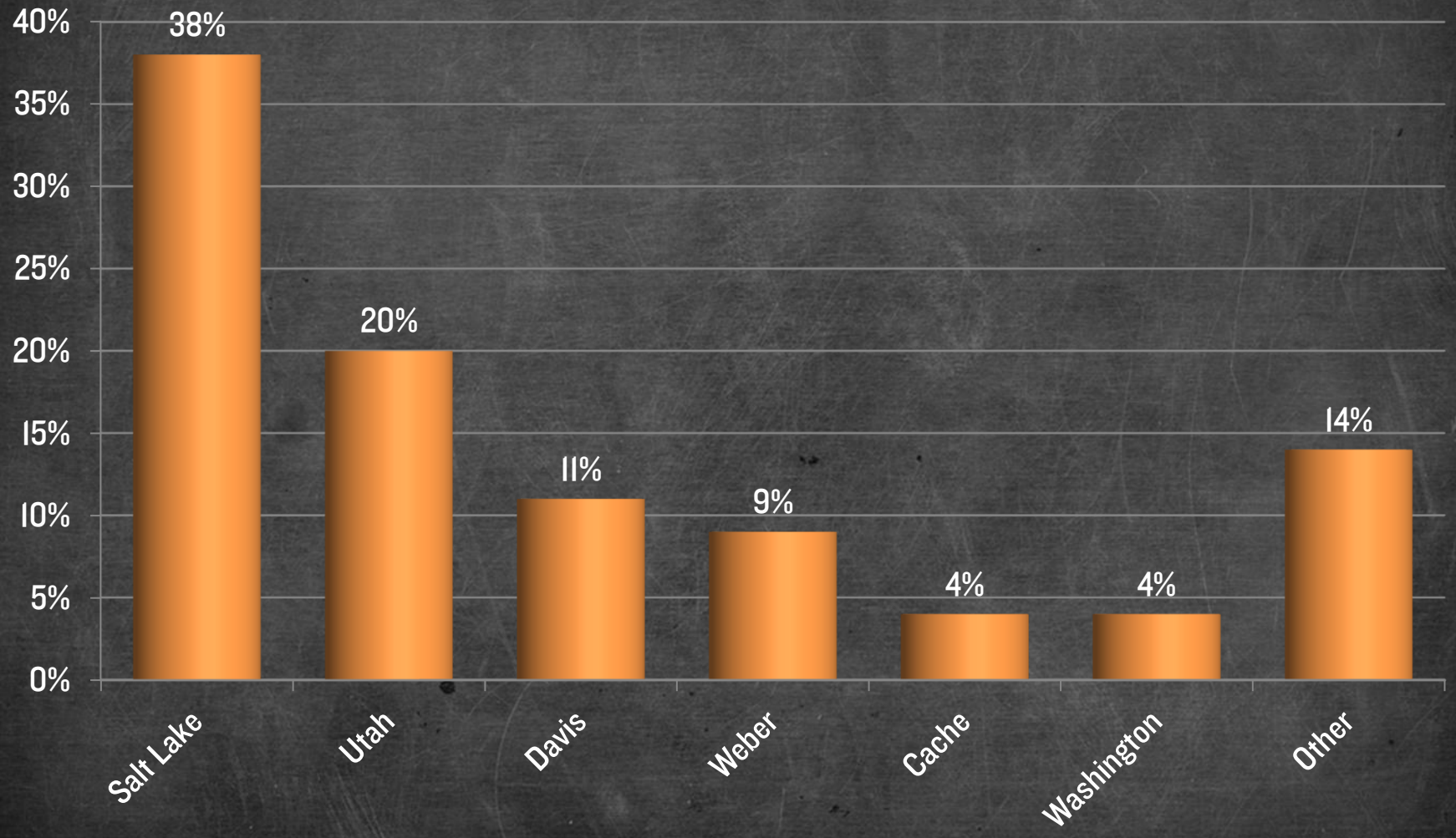
GENDER

[Recorded by observation of the interviewer]



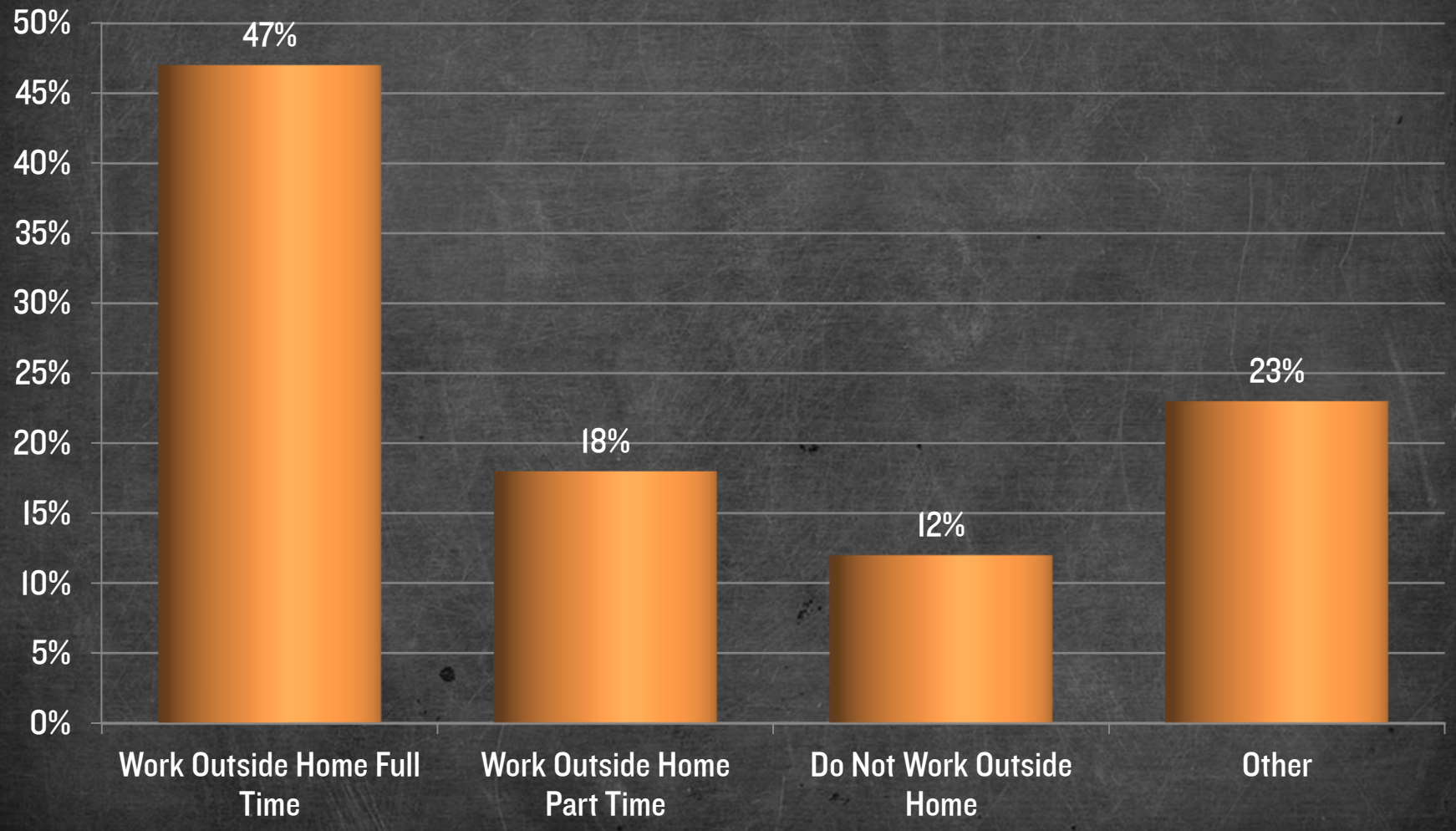
COUNTY

Q: In which County do you currently live?



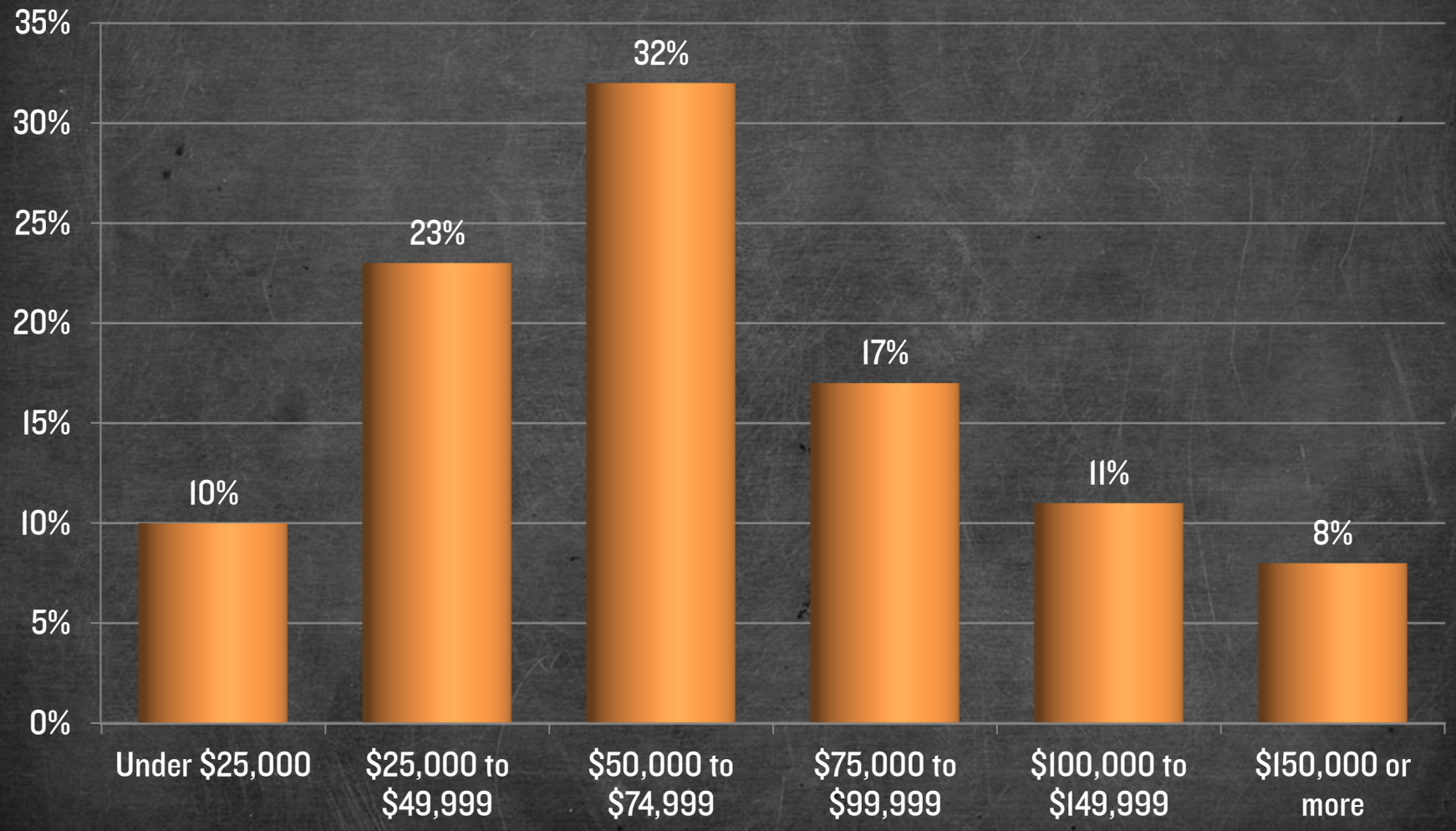
CURRENT WORK STATUS

Q: What is your current work status? Do you...



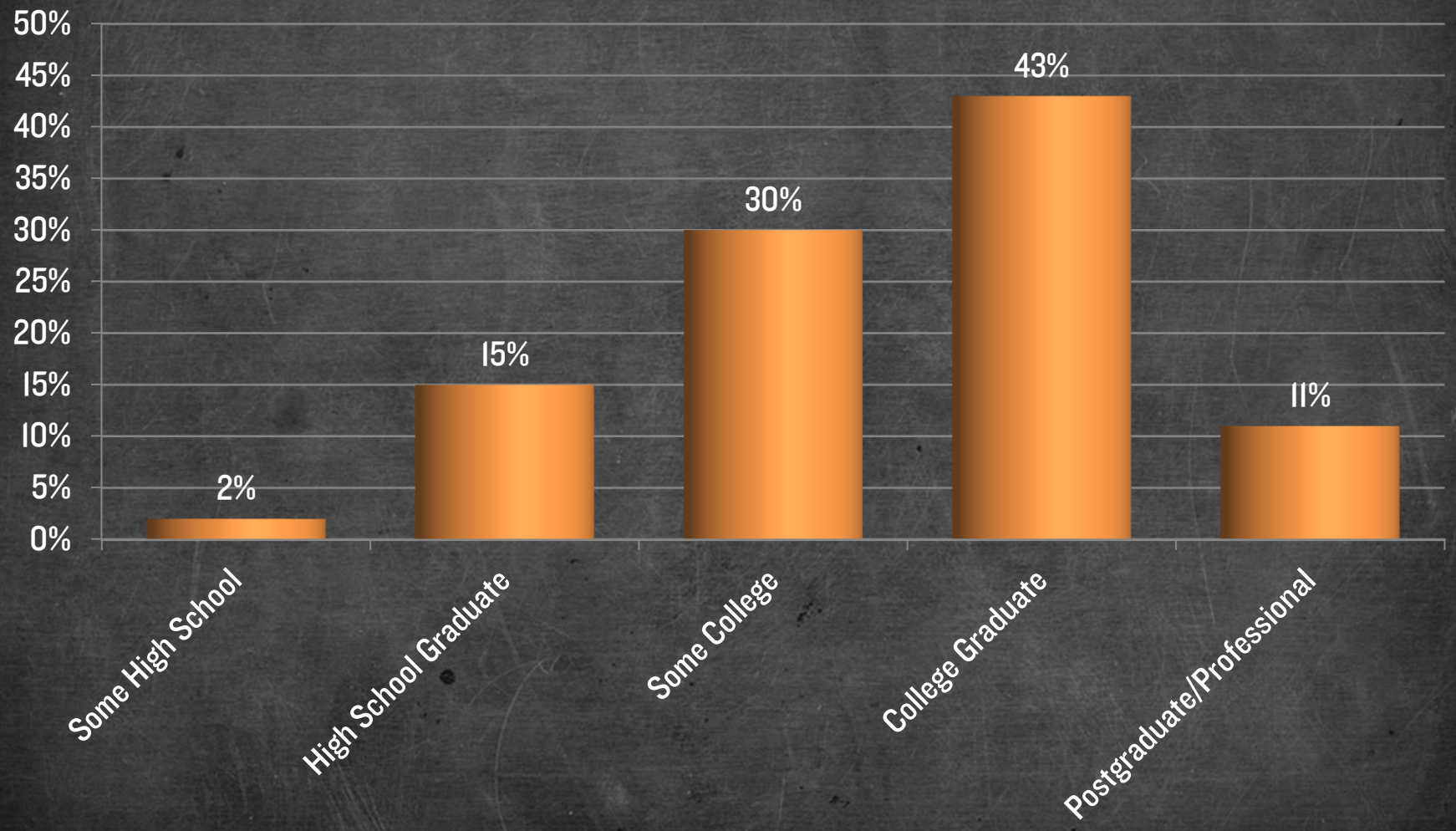
ANNUAL HOUSEHOLD INCOME

Q: Which if the following best describes your annual household income?



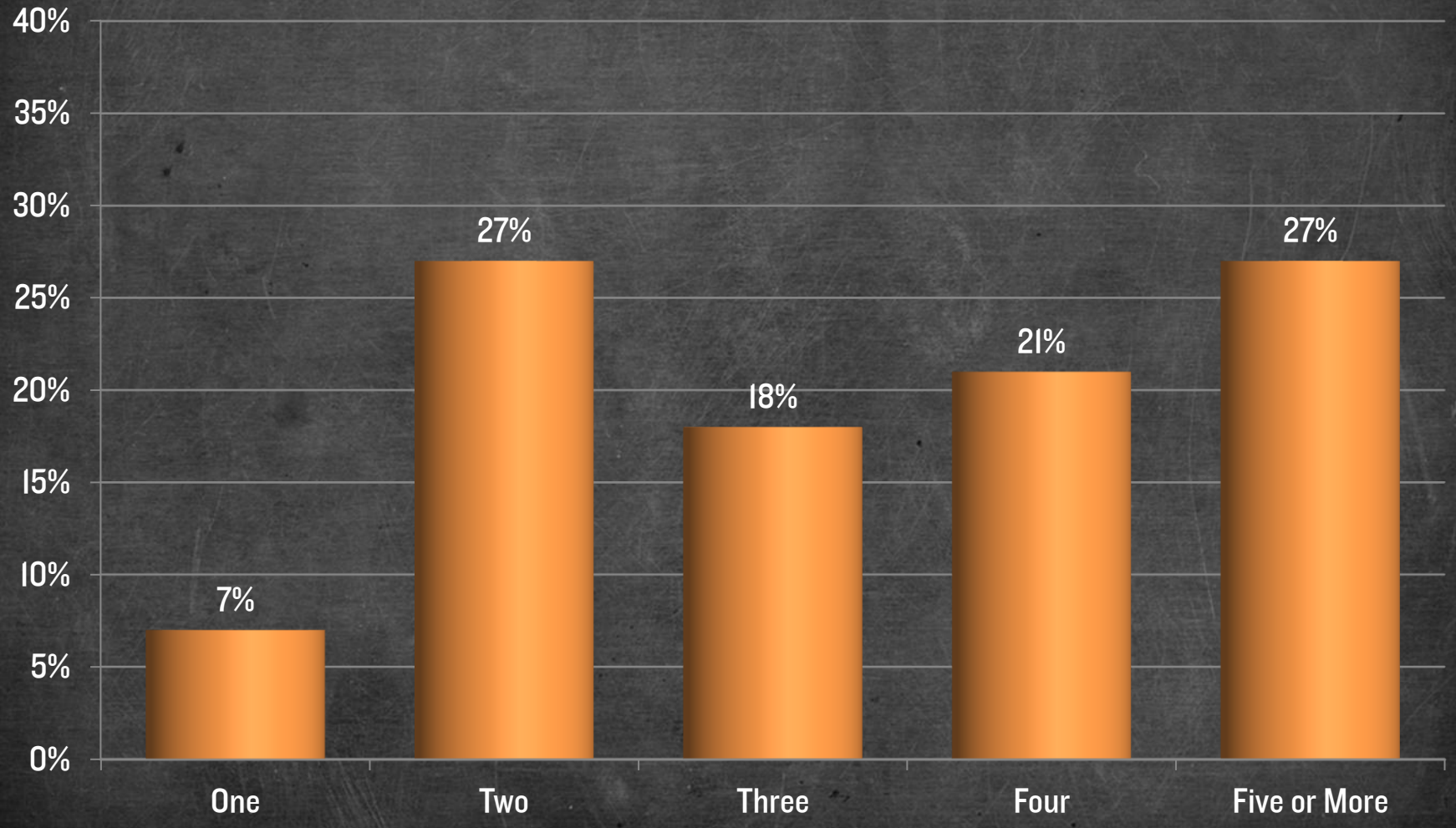
EDUCATION

Q: What was the last level of education you completed?



HOUSEHOLD SIZE

Q: Including yourself, how many individuals currently live in your household?

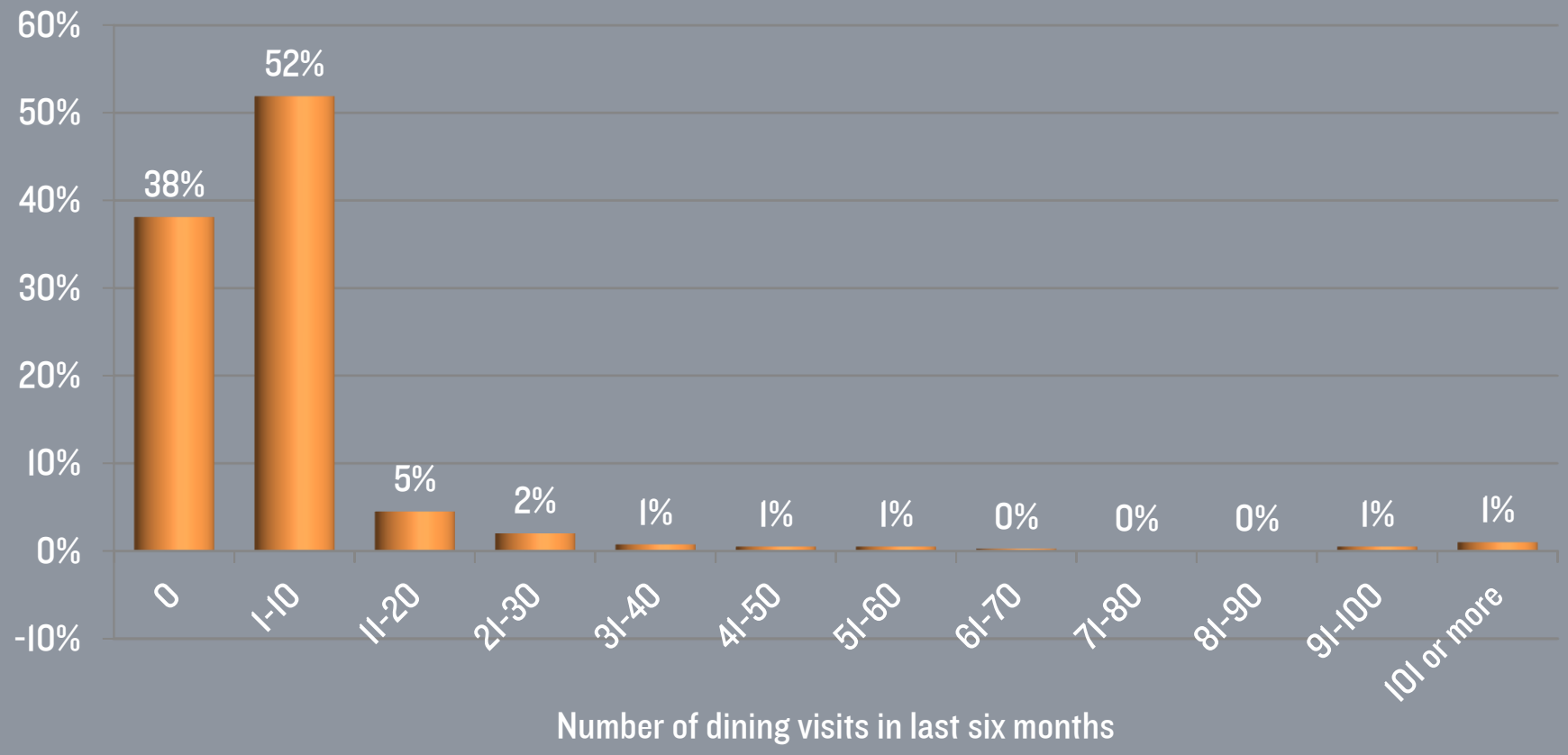


VISITATION TO DOWNTOWN

Dining, Shopping, Religious
and Entertainment

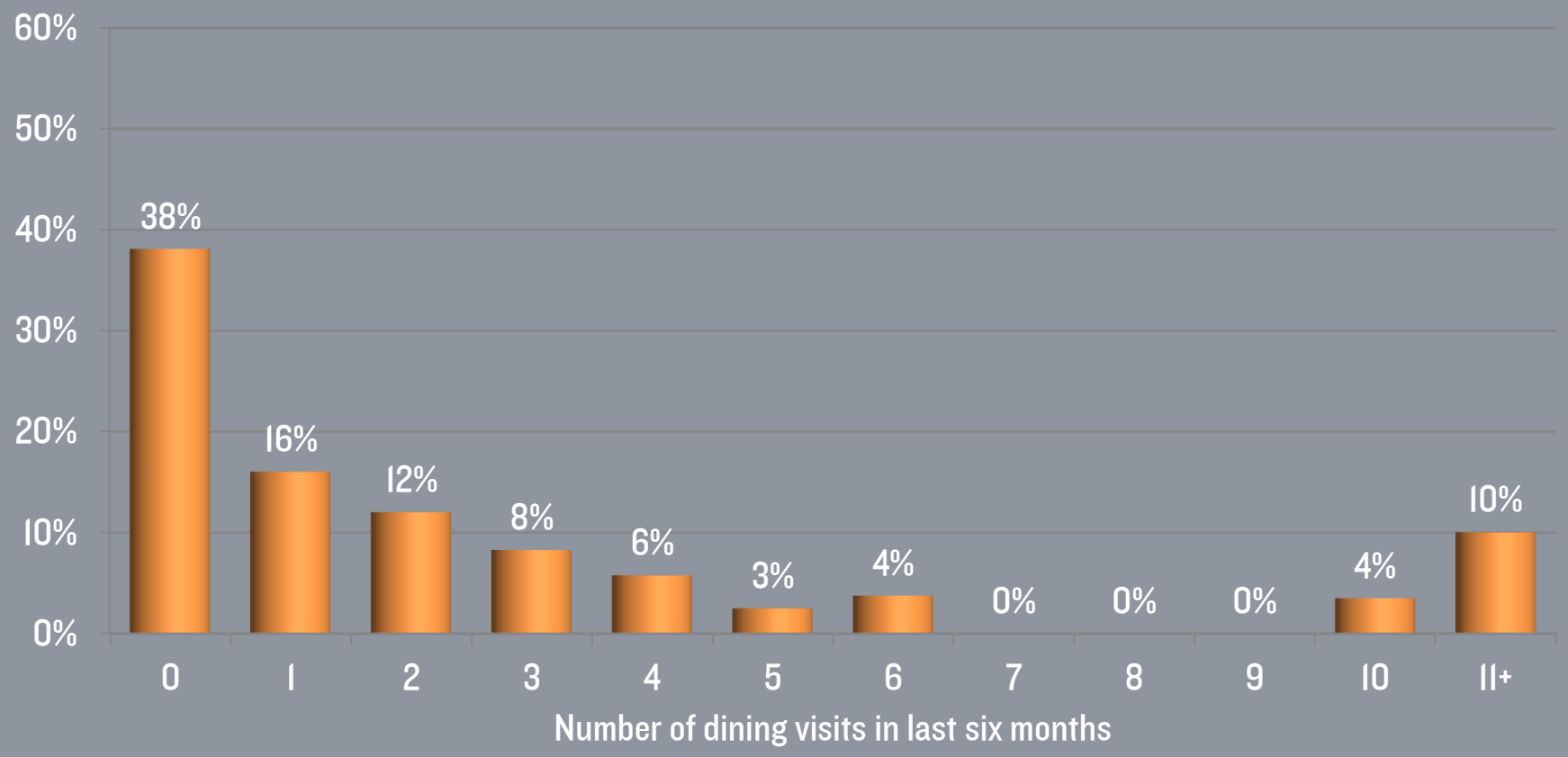
DINING DOWNTOWN IN LAST 6 MONTHS

Over six in ten respondents (62%) said they visited Downtown Salt Lake in the last six months for dining. The majority, 52%, dined Downtown 1 - 10 times during that same time period, with another 5% saying they had come 11 - 20 times.



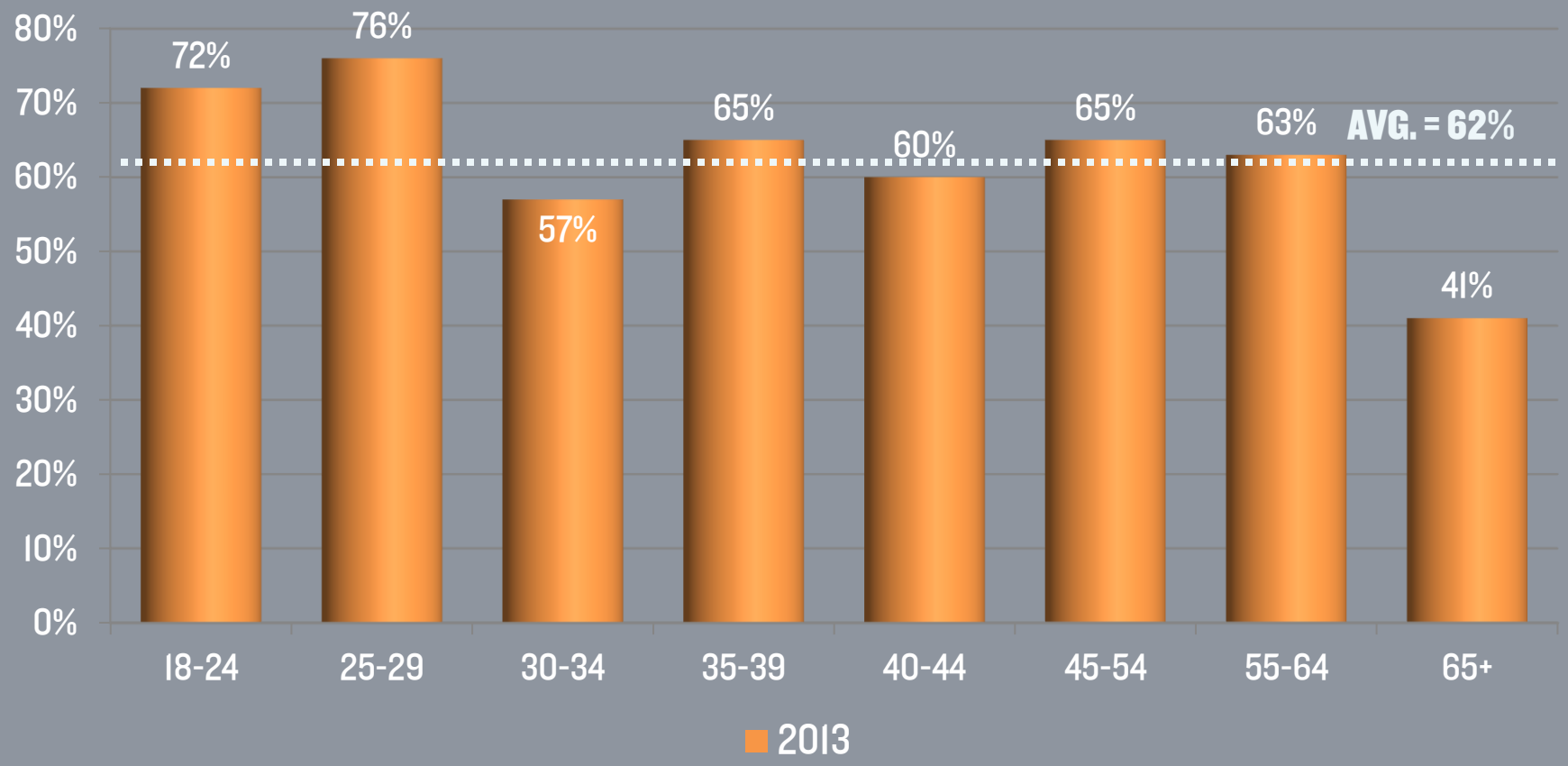
DINING DOWNTOWN IN LAST 6 MONTHS

Breaking down dining visits even further, more than one-fourth (28%) came downtown for dining once or twice, and another 21% indicated they came between 3 - 7 times. 14% came Downtown for dining 10 or more times.



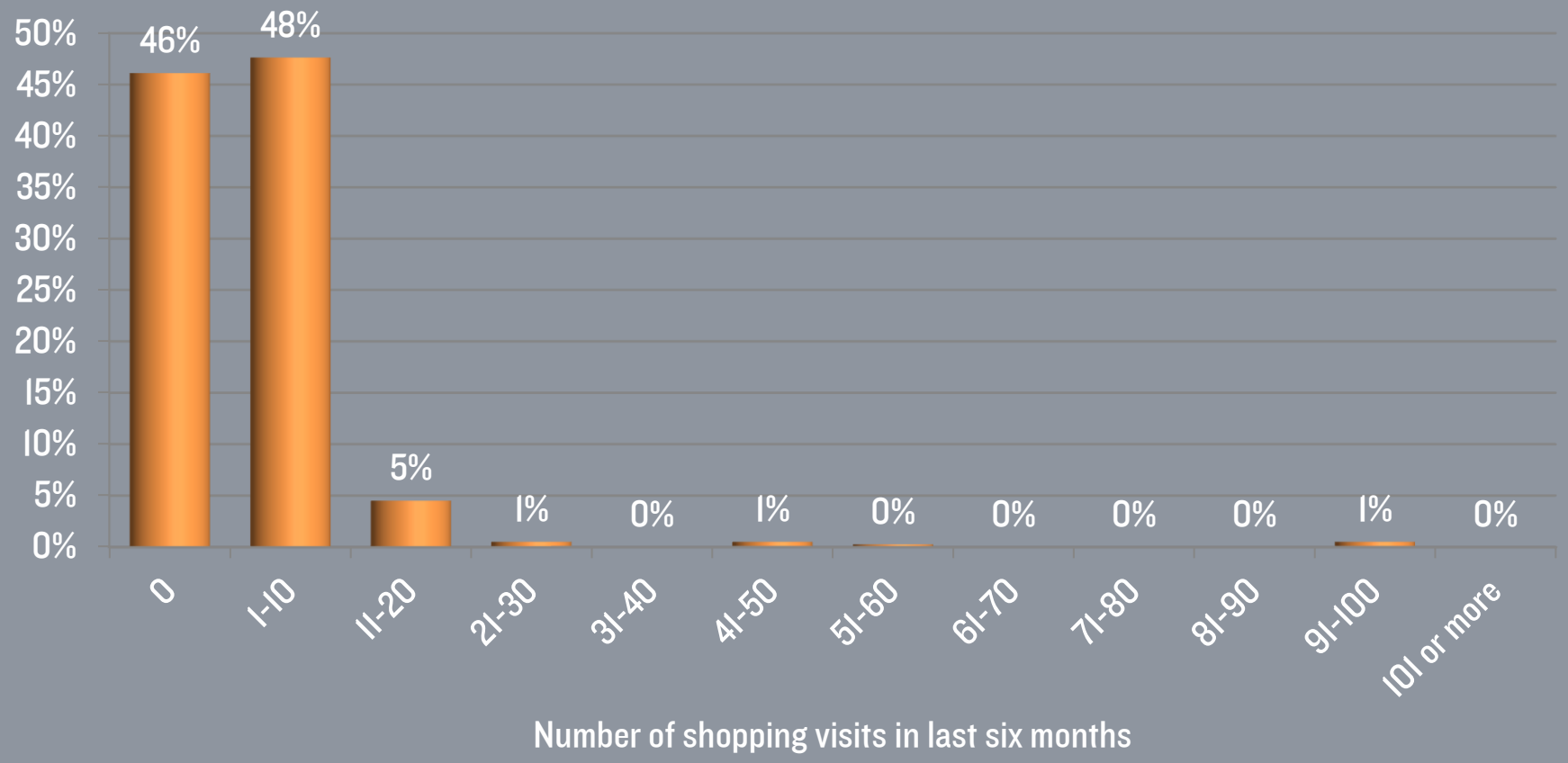
DINING DOWNTOWN IN LAST 6 MONTHS (BY AGE)

Those aged 25 – 29 had the highest visits to Downtown for dining, followed by 18 - 24 year olds. Ages 35 – 64 hovered around the average while the 30-34 and 65+ categories had the lowest propensity to dine Downtown in the last 6 months.



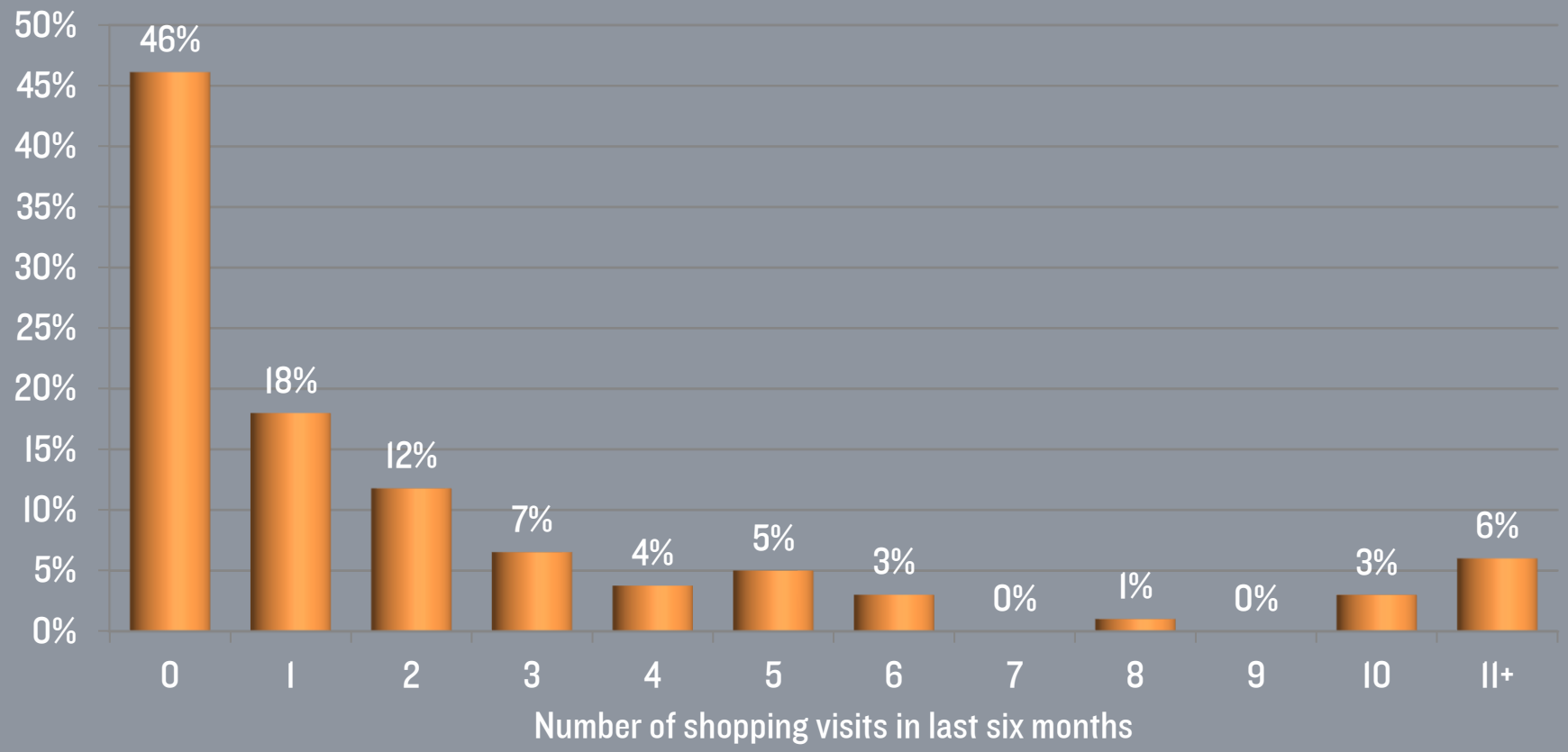
SHOPPING DOWNTOWN IN LAST 6 MONTHS

Over half of all respondents (54%) said they visited Downtown Salt Lake in the last six months for shopping versus 46% of whom said they did not visit at all for shopping.



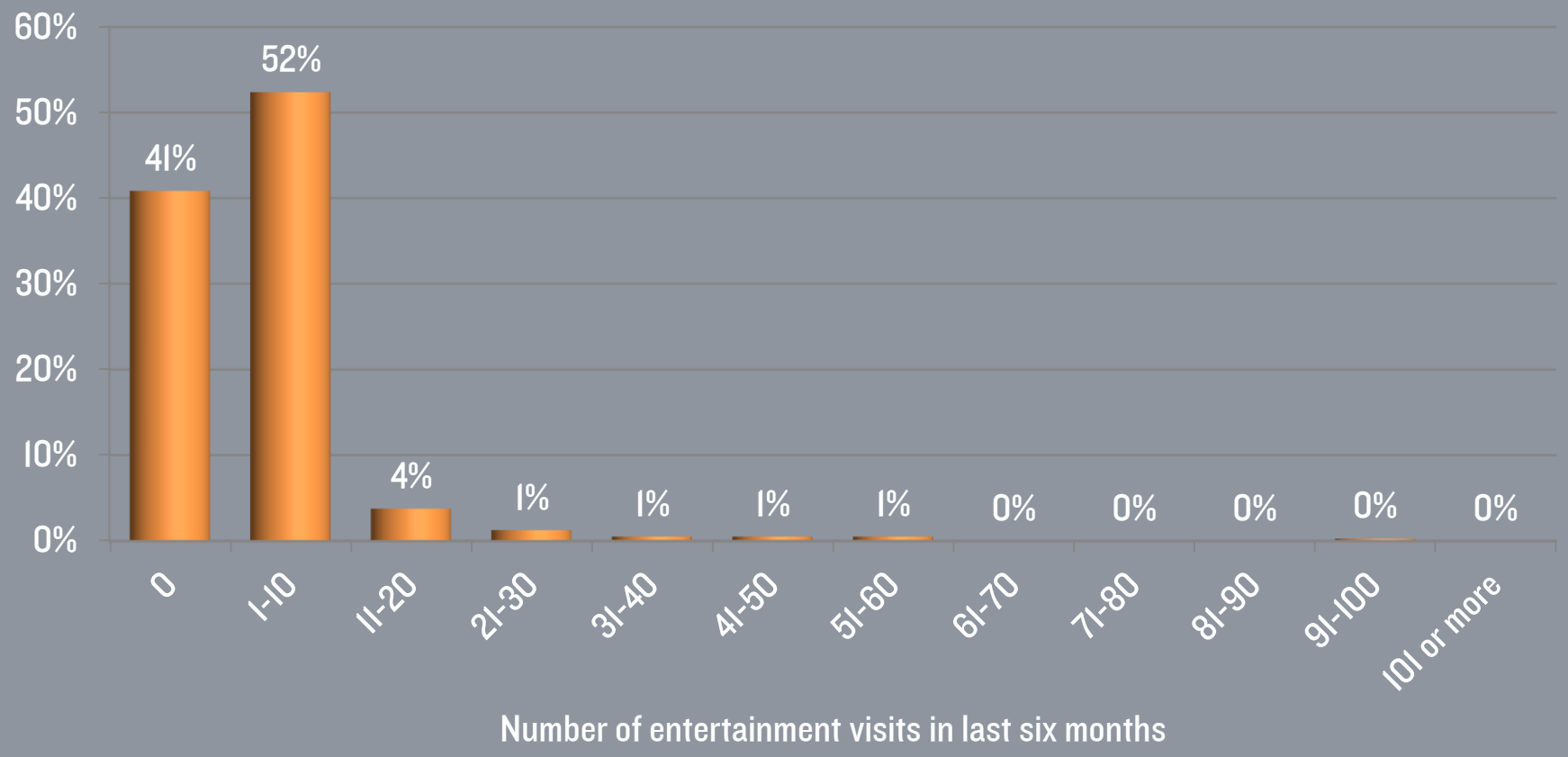
SHOPPING DOWNTOWN IN LAST 6 MONTHS

Breaking down shopping visits even further, more than one-third (37%) came Downtown for shopping 1 - 3 times, and another 12% indicated they came between 4 - 7 times. 9% came Downtown for shopping 10 or more times.



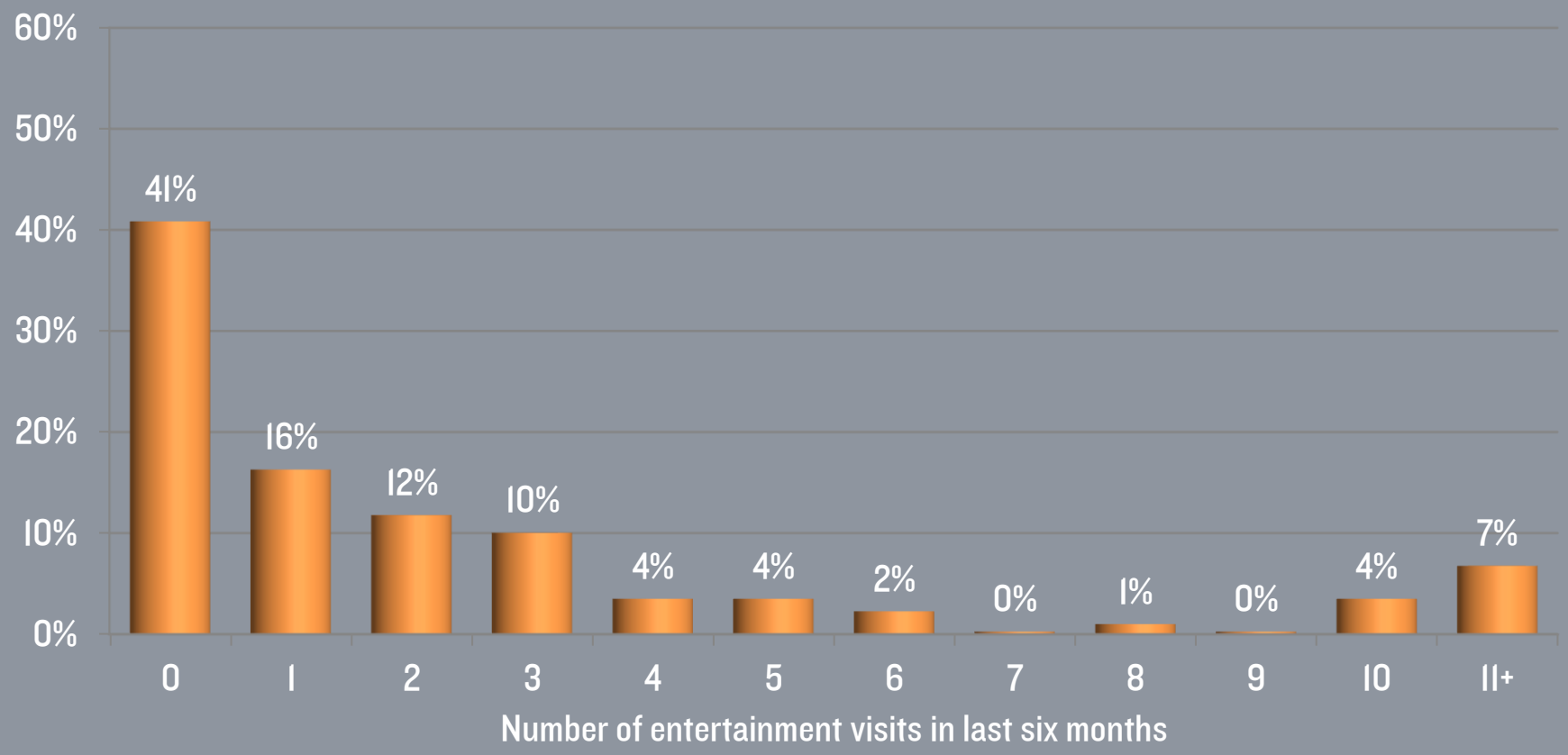
ENTERTAINMENT DOWNTOWN IN LAST 6 MONTHS

More than half of all respondents (59%) said they visited downtown Salt Lake in the last six months for entertainment (sporting events, performance arts, community festivals, etc.). The remaining 41% said they had not been Downtown for entertainment during that same time period.



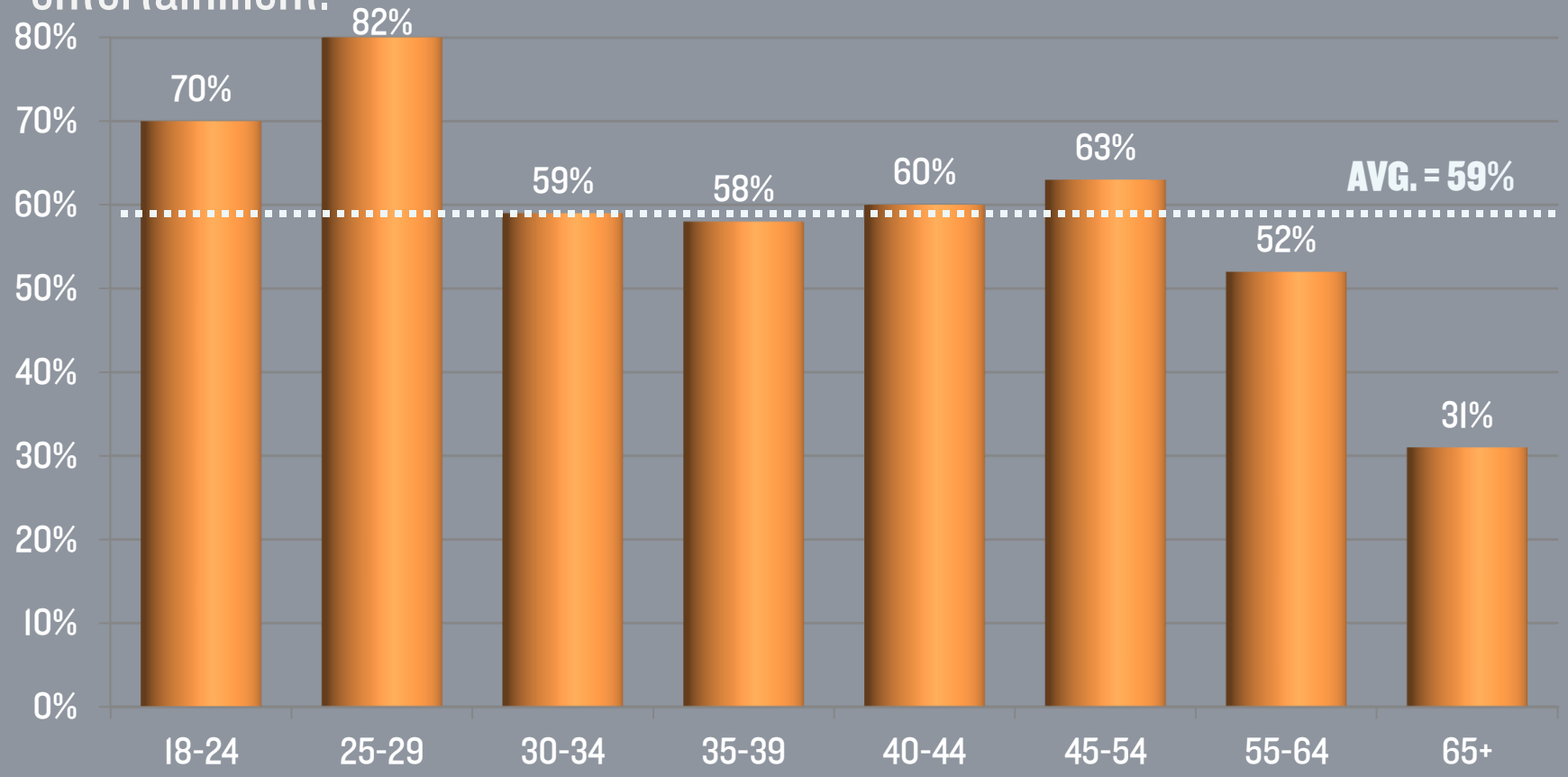
ENTERTAINMENT DOWNTOWN IN LAST 6 MONTHS

Breaking down entertainment visits even further, more than one-fourth of respondents (28%) came Downtown for entertainment 1 - 2 times, and another 21% indicated they came between 3 - 8 times. 11% came Downtown for entertainment 10 or more times.



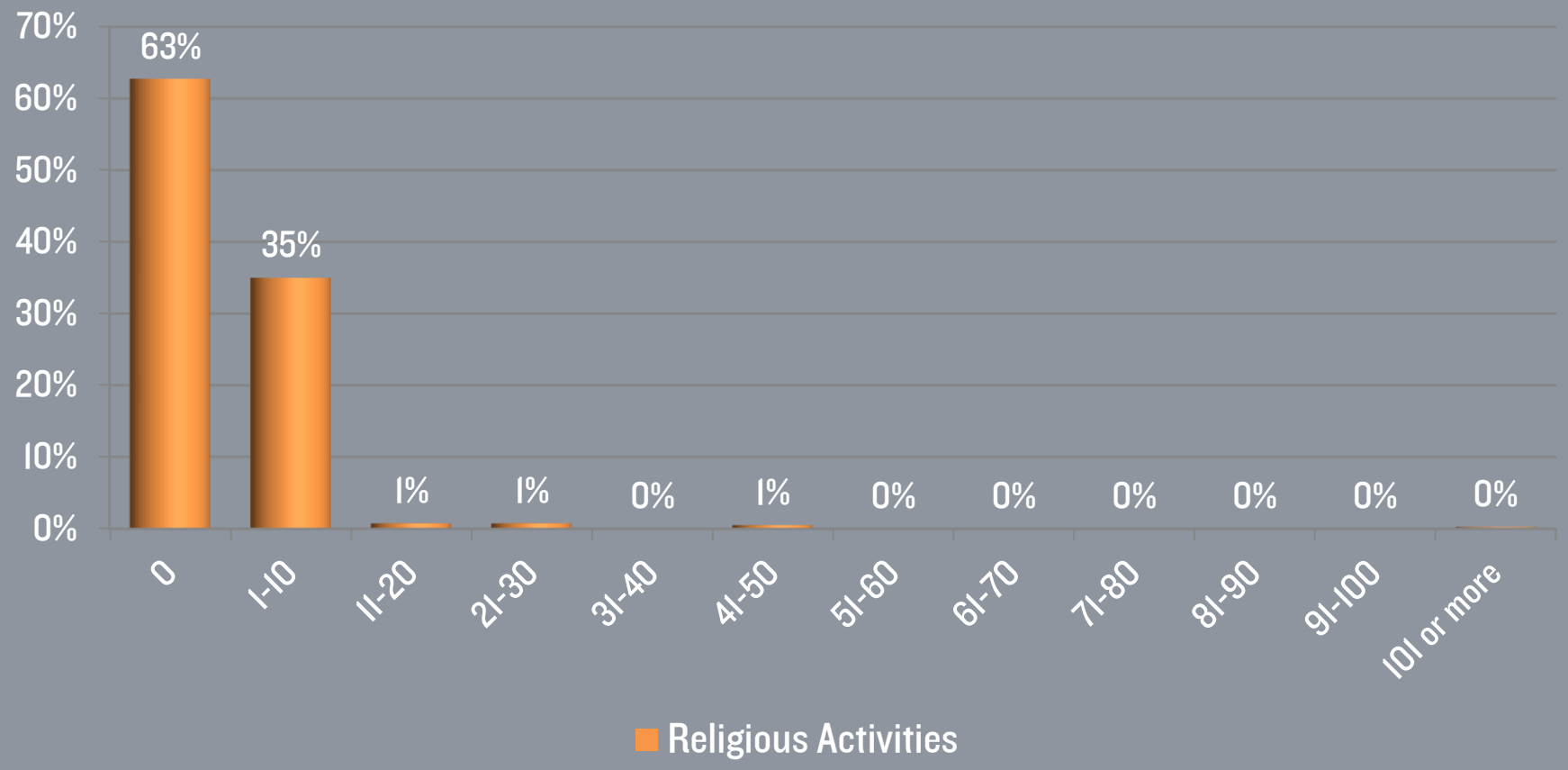
ENTERTAINMENT DOWNTOWN IN LAST 6 MONTHS (BY AGE)

Respondents aged 18 – 29 were more likely than any other ages to attend entertainment Downtown in the previous six months. Those aged 30 – 54 were less likely and were around the statewide average of 59%. Over the age of 55 respondents became even less likely to visit Downtown for entertainment.



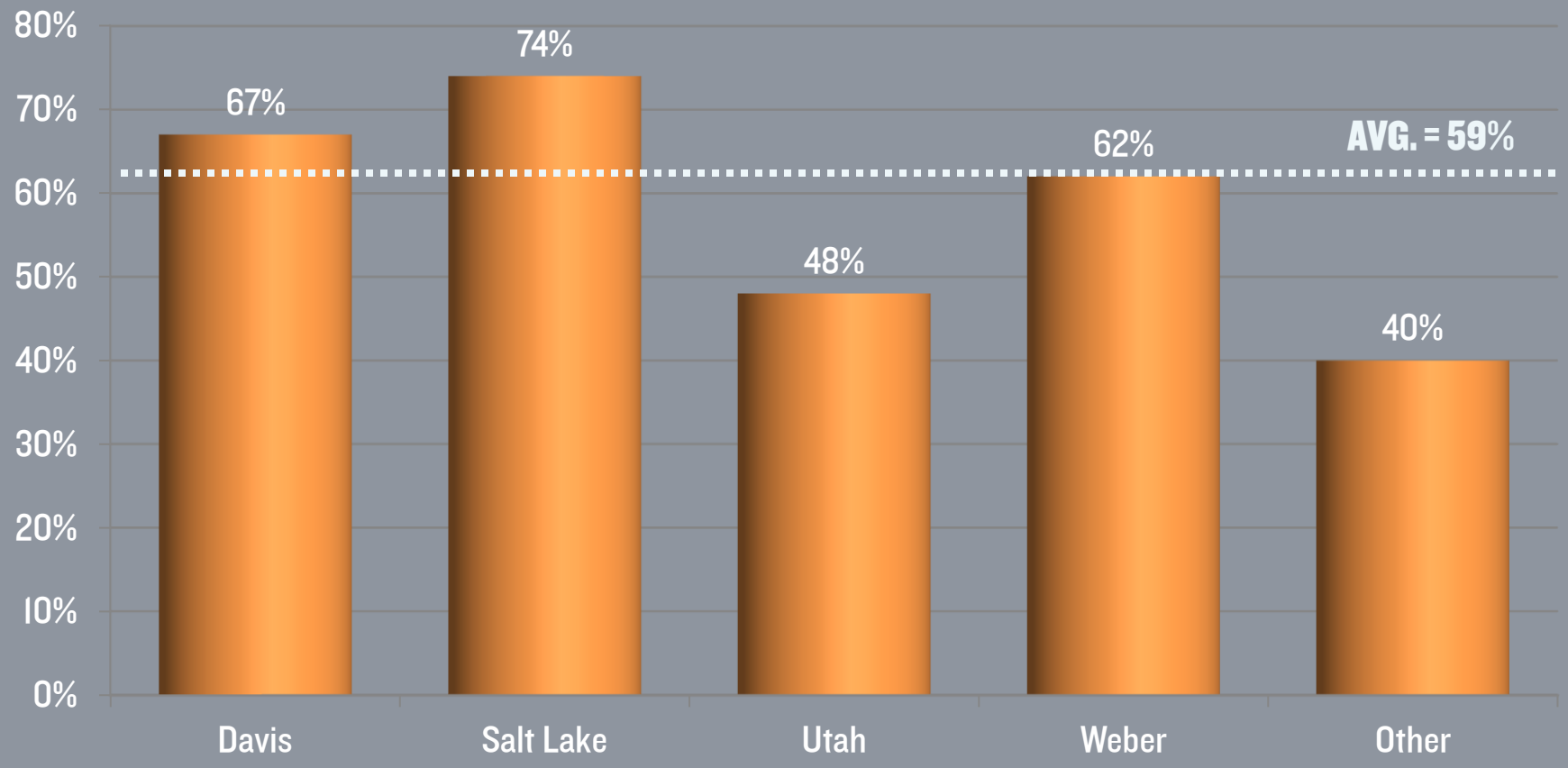
RELIGIOUS EVENTS DOWNTOWN IN LAST 6 MONTHS

Less than four out of ten respondents (37%) said they visited Downtown Salt Lake in the last six months for religious activities.



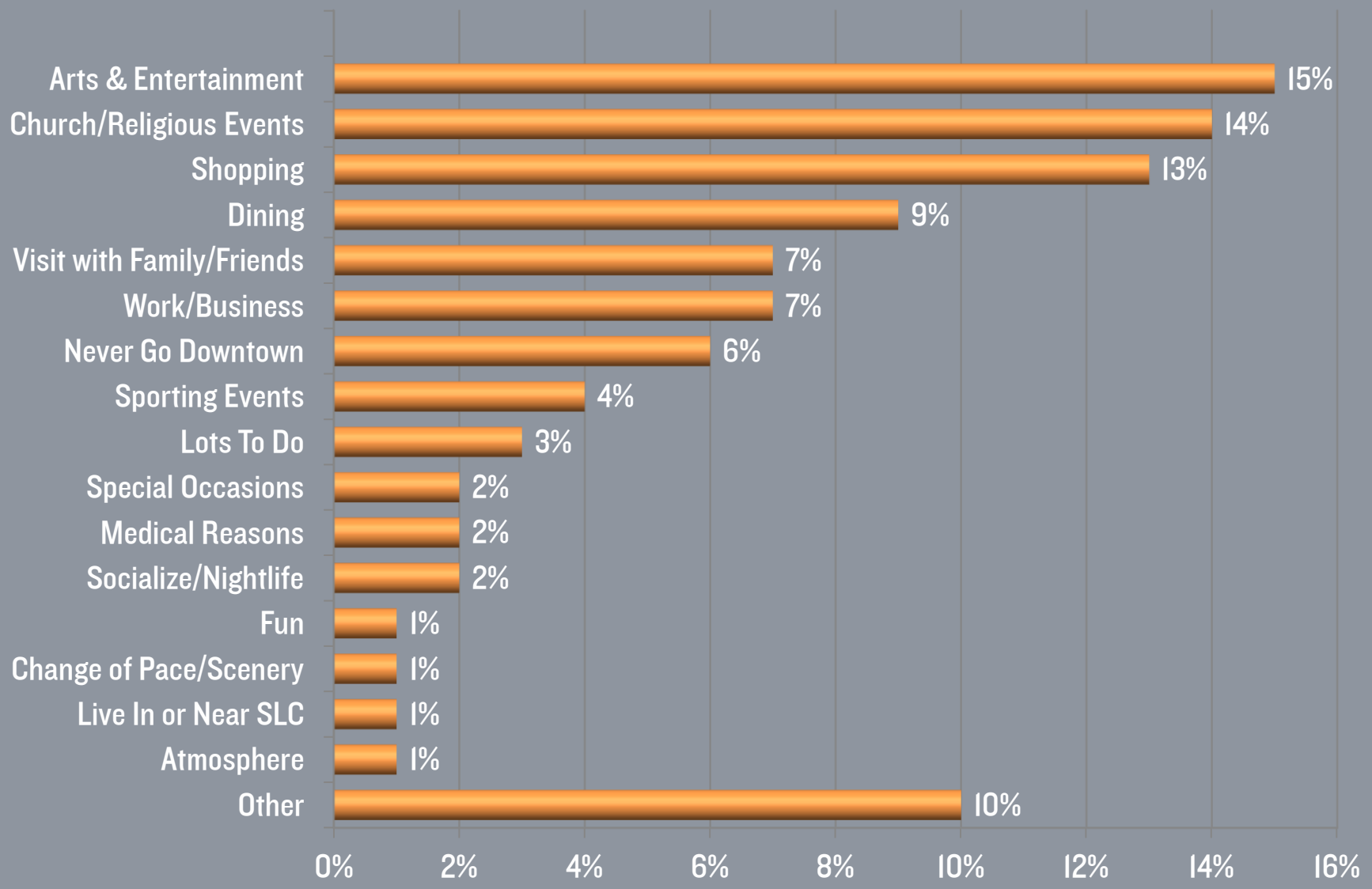
ENTERTAINMENT DOWNTOWN IN LAST 6 MONTHS (BY COUNTY)

For entertainment, which was stated to include "sporting events, performance arts, community festivals, etc.", Davis and Salt Lake Counties were all above the statewide baseline of 59%. For being so far away, its surprising Weber County is above the baseline at 62%. Utah and Other Counties were well below and in the 40% ranges.

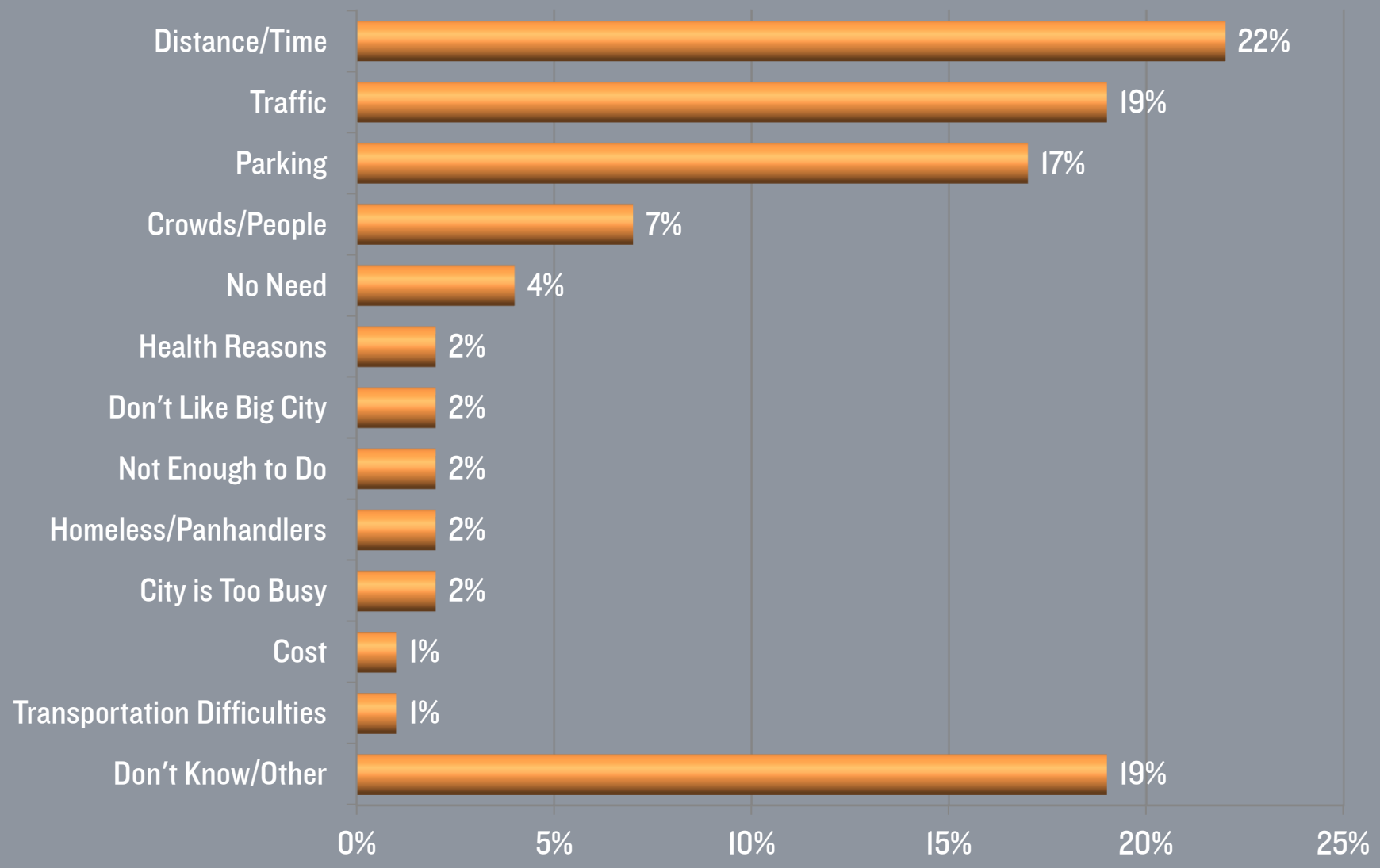


PERCEPTIONS OF DOWNTOWN

BIGGEST MOTIVATIONS/REASONS FOR COMING DOWNTOWN

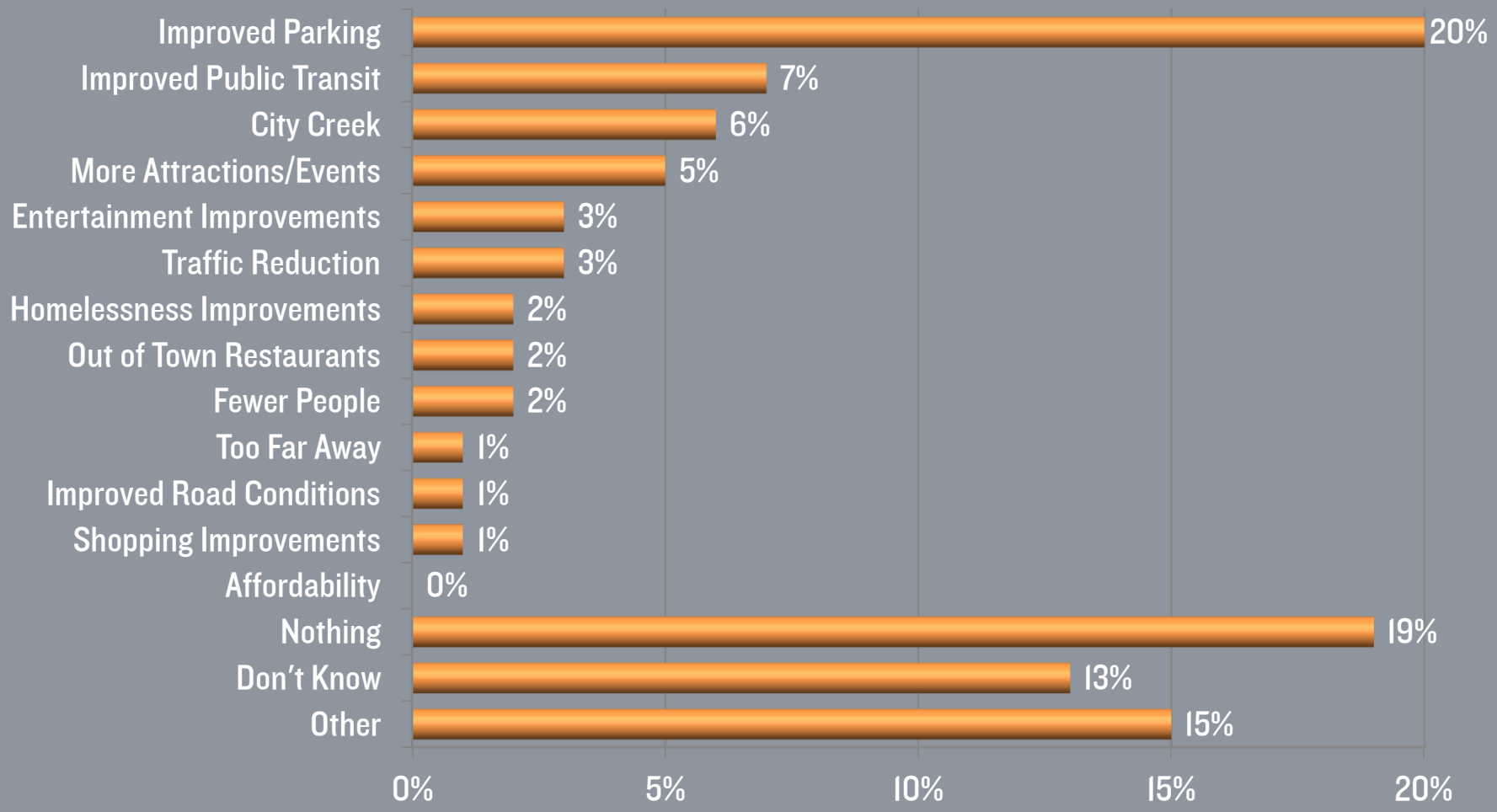


BIGGEST DETERRENTS/REASONS AGAINST COMING DOWNTOWN



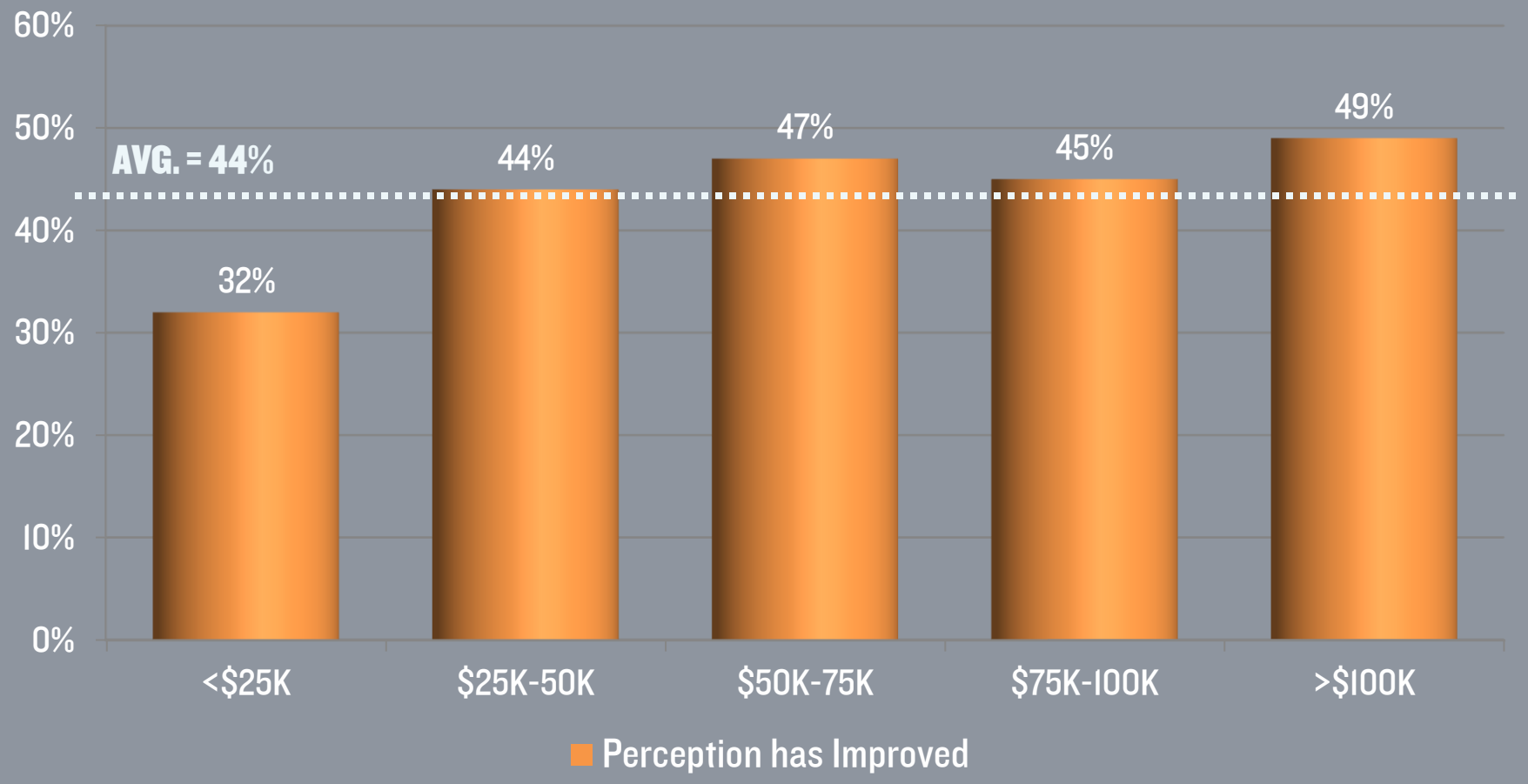
WHAT WOULD MAKE YOU COME DOWNTOWN MORE OFTEN?

Although parking wasn't cited many times as a reason for decreasing perception of Downtown, when all respondents were asked what would make them visit more often, 20% named "improved parking" as the number one factor. This means that while not many respondents see parking as a deterrent, a large portion think it could be improved.



PERCEPTIONS DOWNTOWN HAS IMPROVED (BY INCOME)

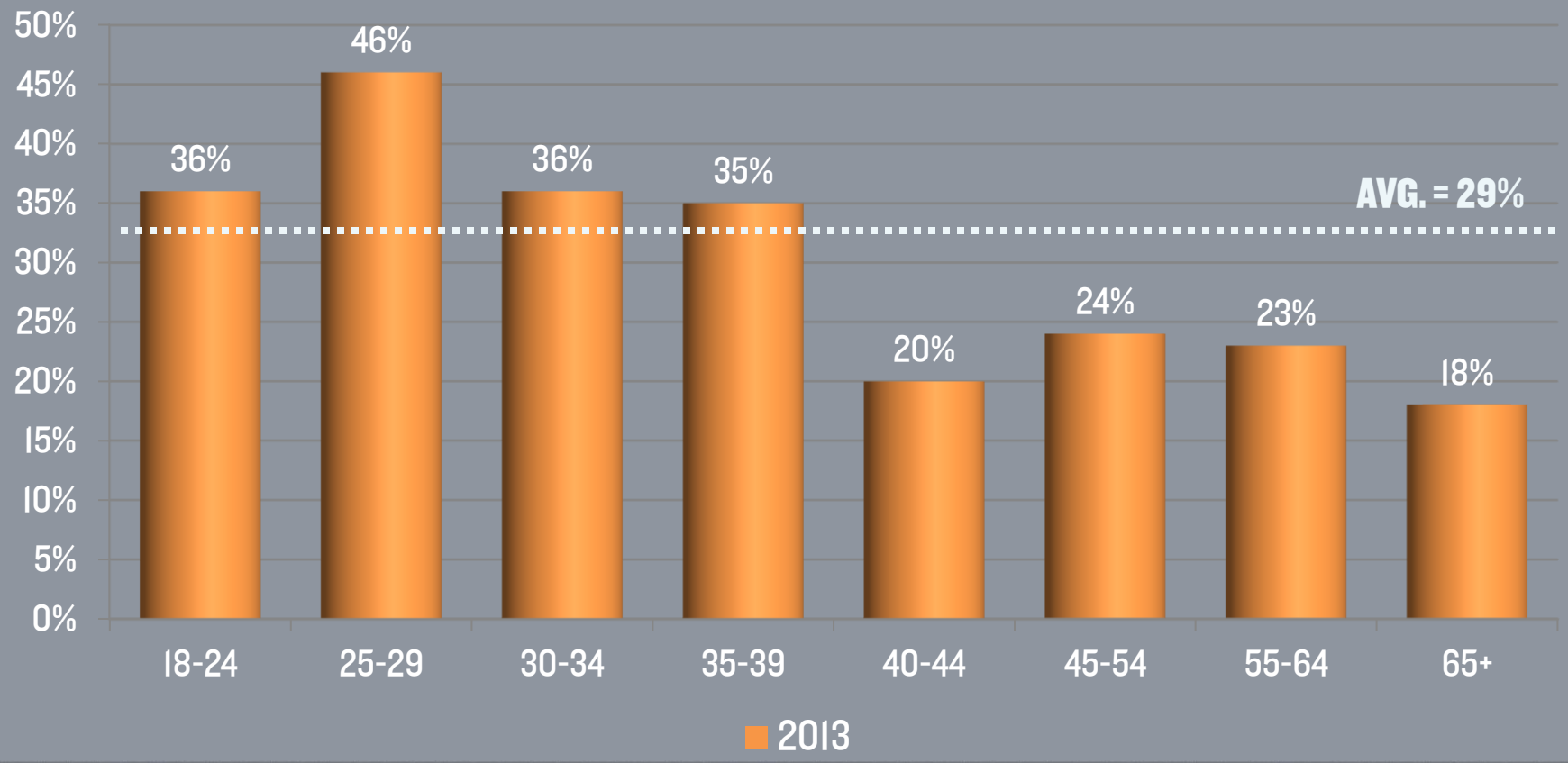
When breaking out by income bracket, perceptions of Downtown seemed to even out a bit more than when looking at age groups. Although the perception of Downtown seems well below average for those with the lowest income, the size of that group is small, increasing the margin of error.



DOWNTOWN DINING

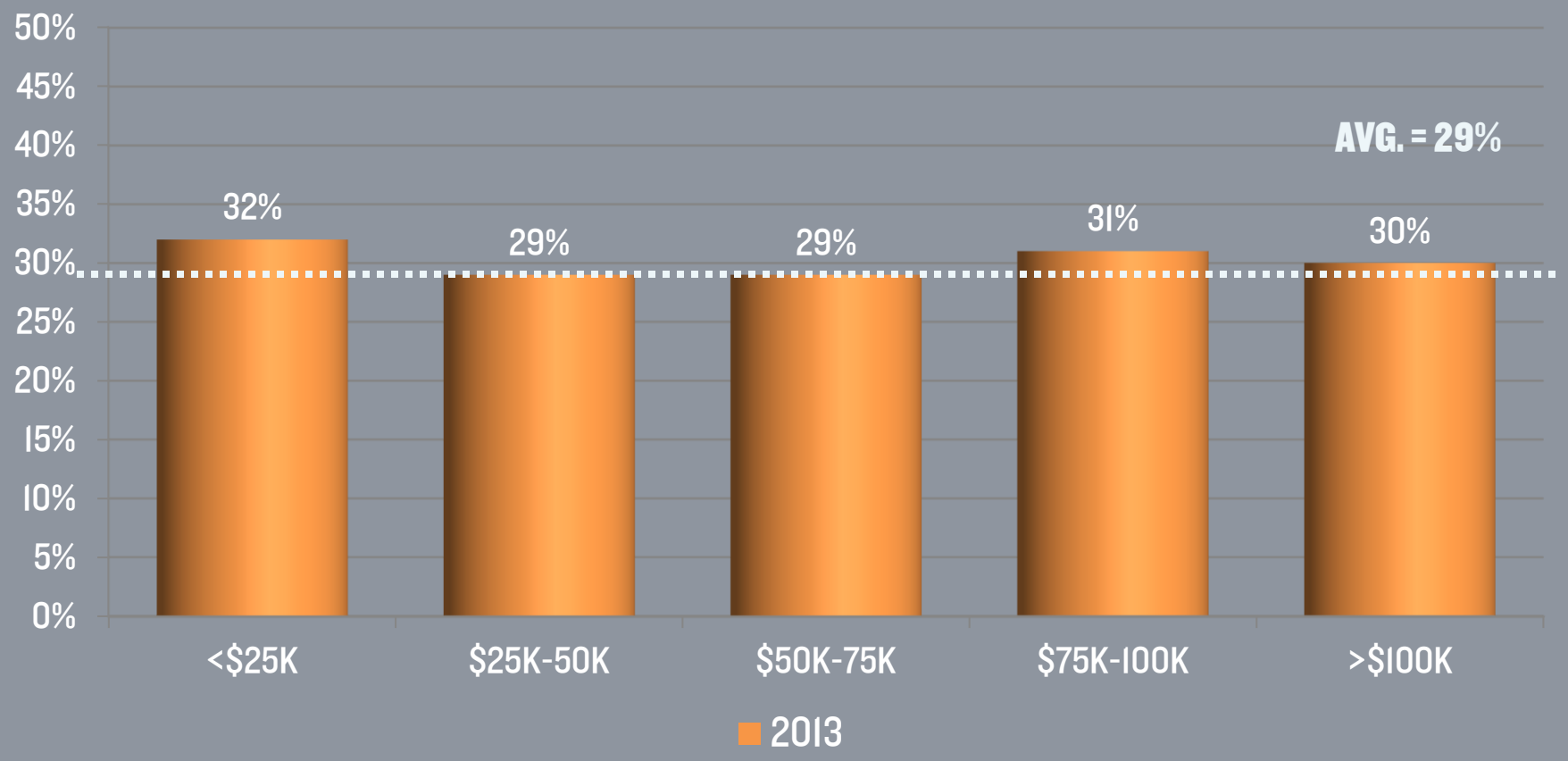
INTEREST IN DINING DOWNTOWN SALT LAKE (BY AGE)

Well over a third of each age group under the age of 40 had interest in dining Downtown, over the average of 29%. Those aged 25 – 29 had the highest interest at 46%. Age groups over 40 decrease dramatically into the low to mid 20% range. This shows a dramatic difference in age groups' interest in dining Downtown.



INTEREST IN DINING DOWNTOWN SALT LAKE (BY INCOME)

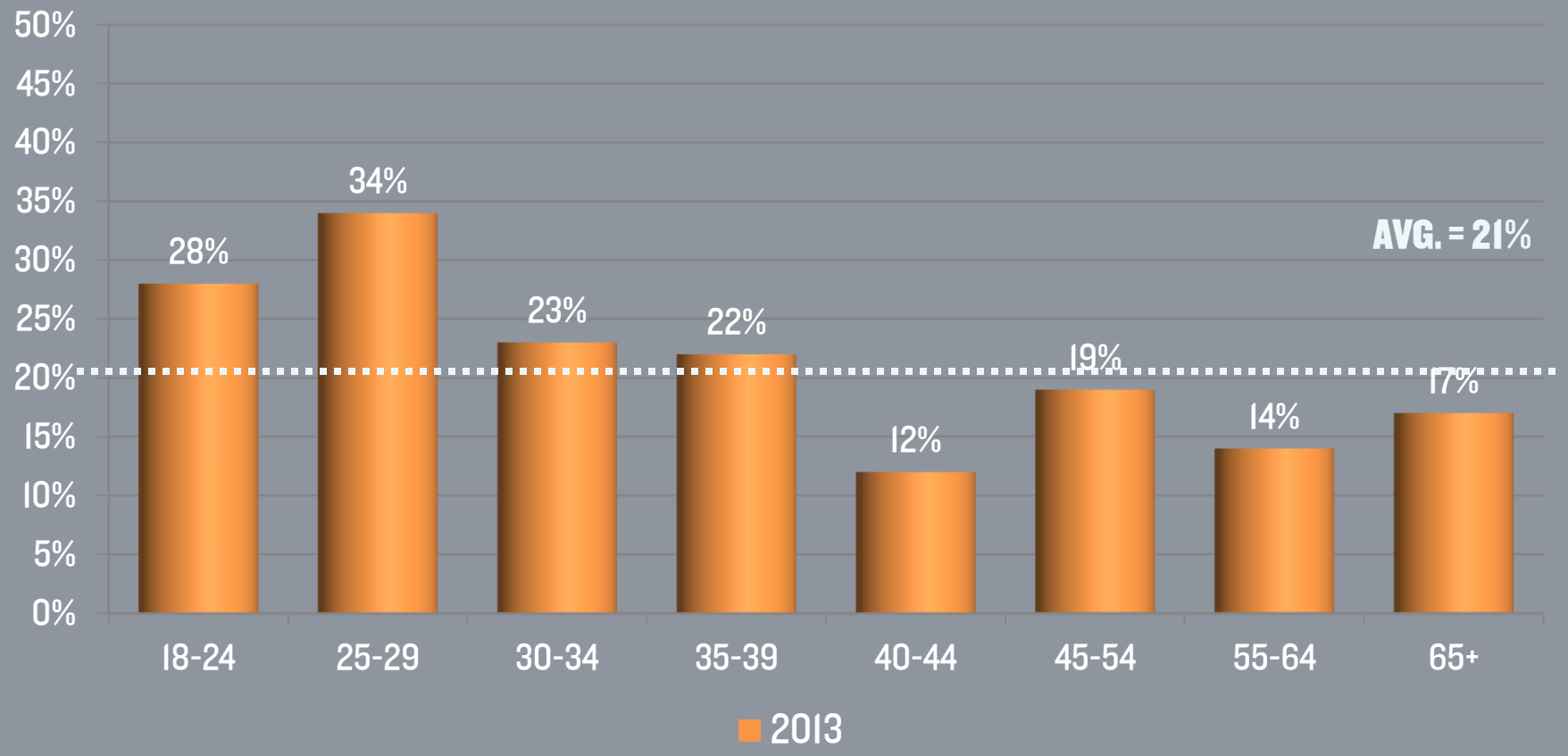
Very surprisingly, household income was nearly identical across the groups, for those who selected 8, 9 or 10. It seems a person's income is not a large factor in overall interest in dining Downtown.



DOWNTOWN SHOPPING

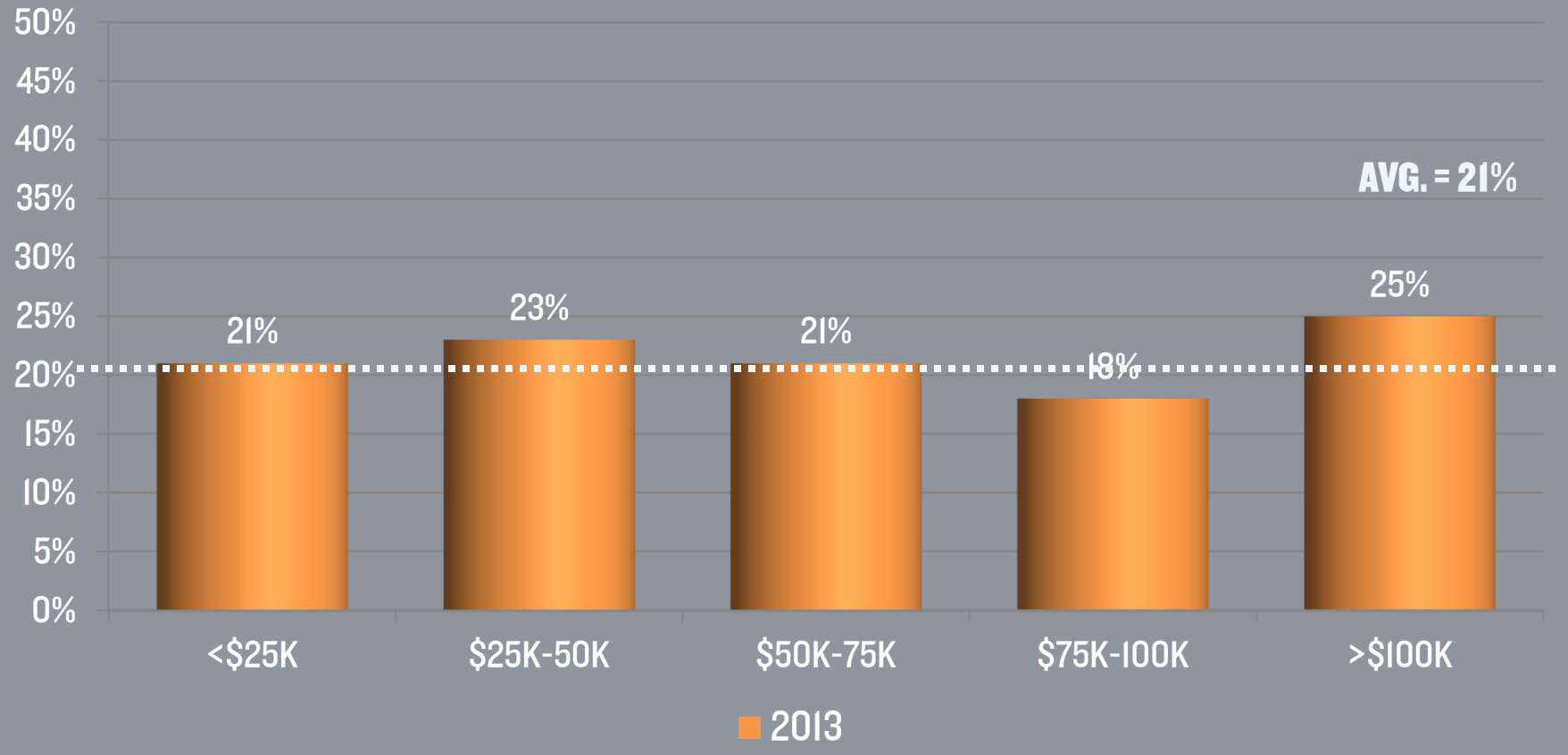
INTEREST IN SHOPPING DOWNTOWN SALT LAKE (BY AGE)

Those aged 18 – 29 had the highest interest in shopping Downtown and were well over the state wide average of 21%. Those aged 30 – 39 were at or above the state average, while those over the age of 40 had much less interest. Although the 45 – 54 and 65+ age groups had higher interest than the other two 40+ age groups, it may be that they were over indexed. The data also suggests different interests in shopping Downtown above and below the age of 40.



INTEREST IN SHOPPING DOWNTOWN SALT LAKE (BY INCOME)

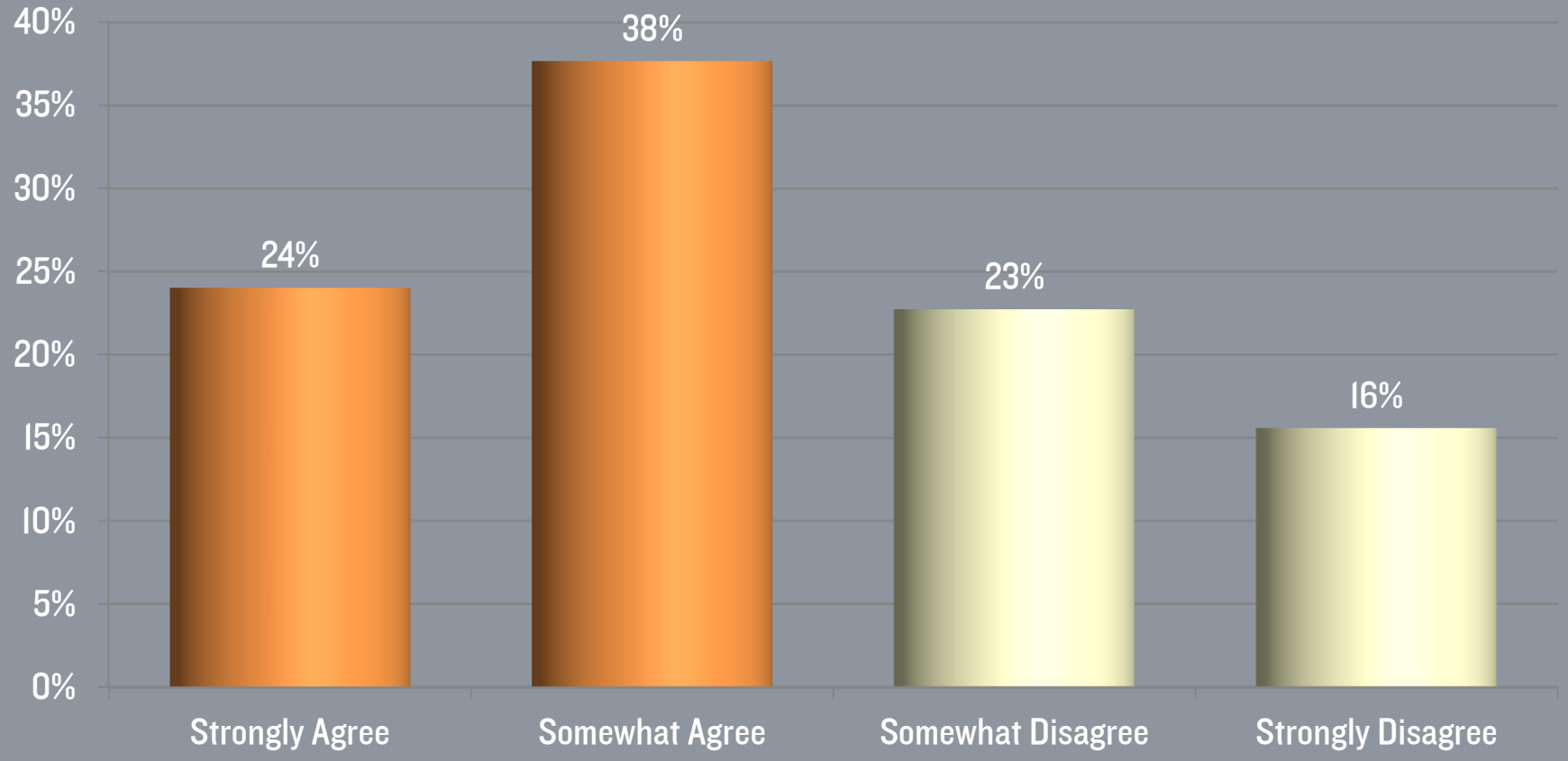
Similar to Interest in Dining Downtown, household income was nearly identical across the groups, for those who selected 8, 9 or 10. Only the $100K+ respondents were noticeably higher than the state wide average. It seems a person's income is not a large factor in overall interest to shop Downtown. At least up until HHI is greater than $100,000.



PARKING DOWNTOWN

AVAILABILITY OF DOWNTOWN PARKING

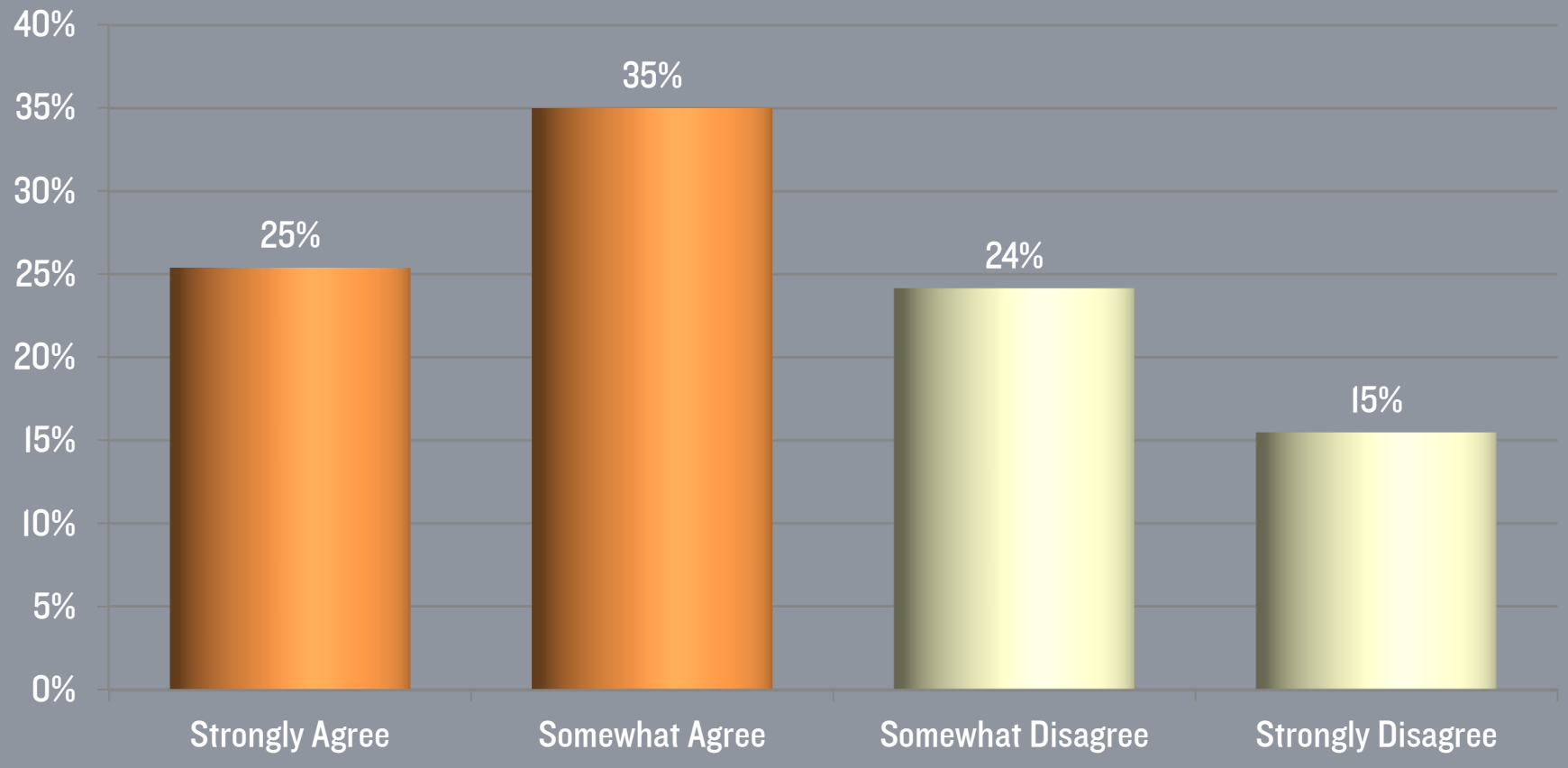
Almost two-thirds of respondents (62%) said they either "strongly" or "somewhat agreed" when asked if parking in Downtown Salt Lake was more *available* today than it was 12 months ago. Less than half of respondents felt strongly about their answer (40%).



NOTE: Excludes all respondents who answered "don't know" to this question.

CONVENIENCE OF DOWNTOWN PARKING

When asked about the improvement in *convenience* of Downtown parking, 60% of respondents agreed that parking is more convenient than it was 12 months ago. This is very slightly lower than the response to an increase in *availability* of parking in 2013.

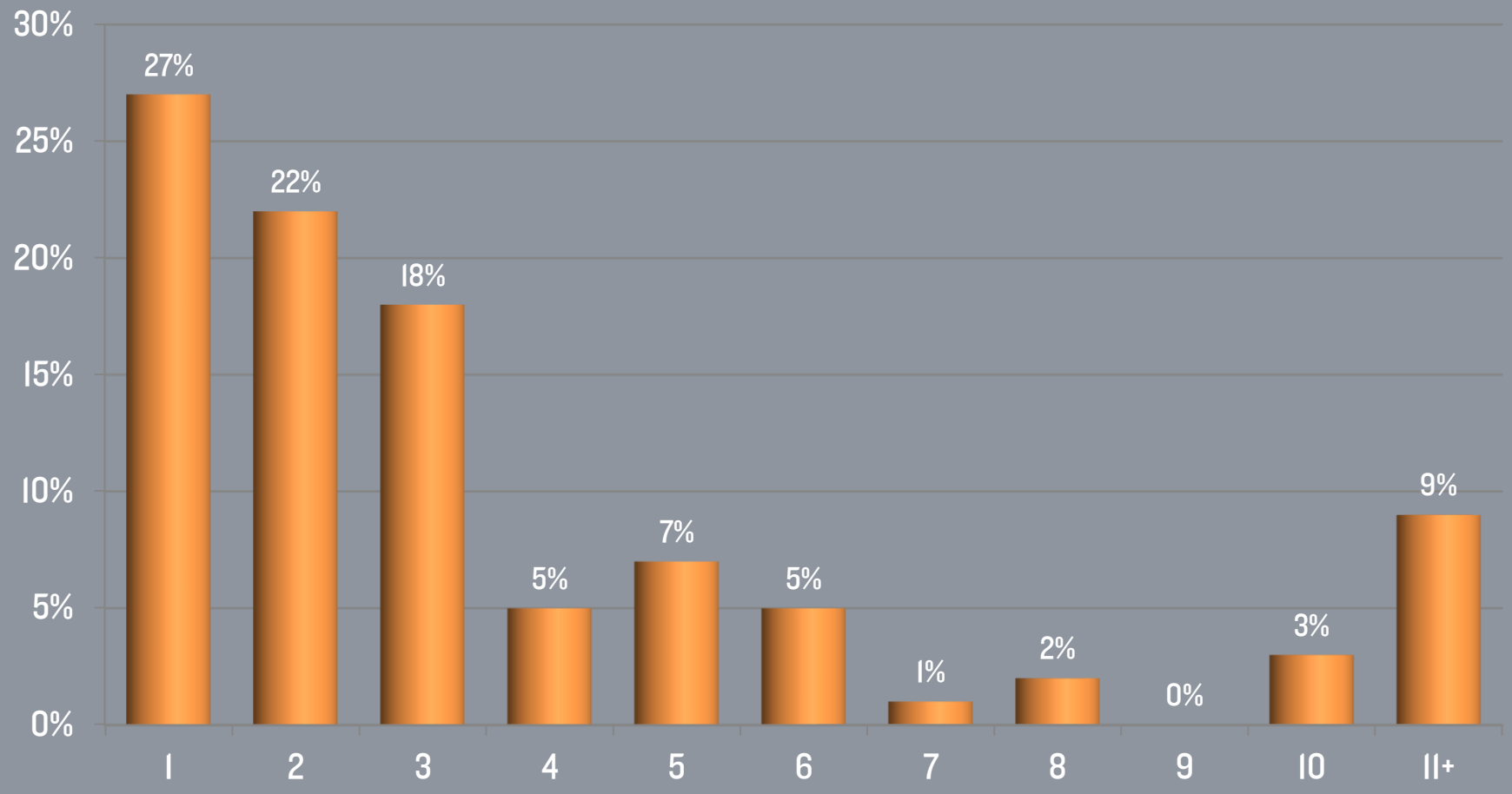


NOTE: Excludes respondents who answered "don't know" to this question.

DOWNTOWN MALLS

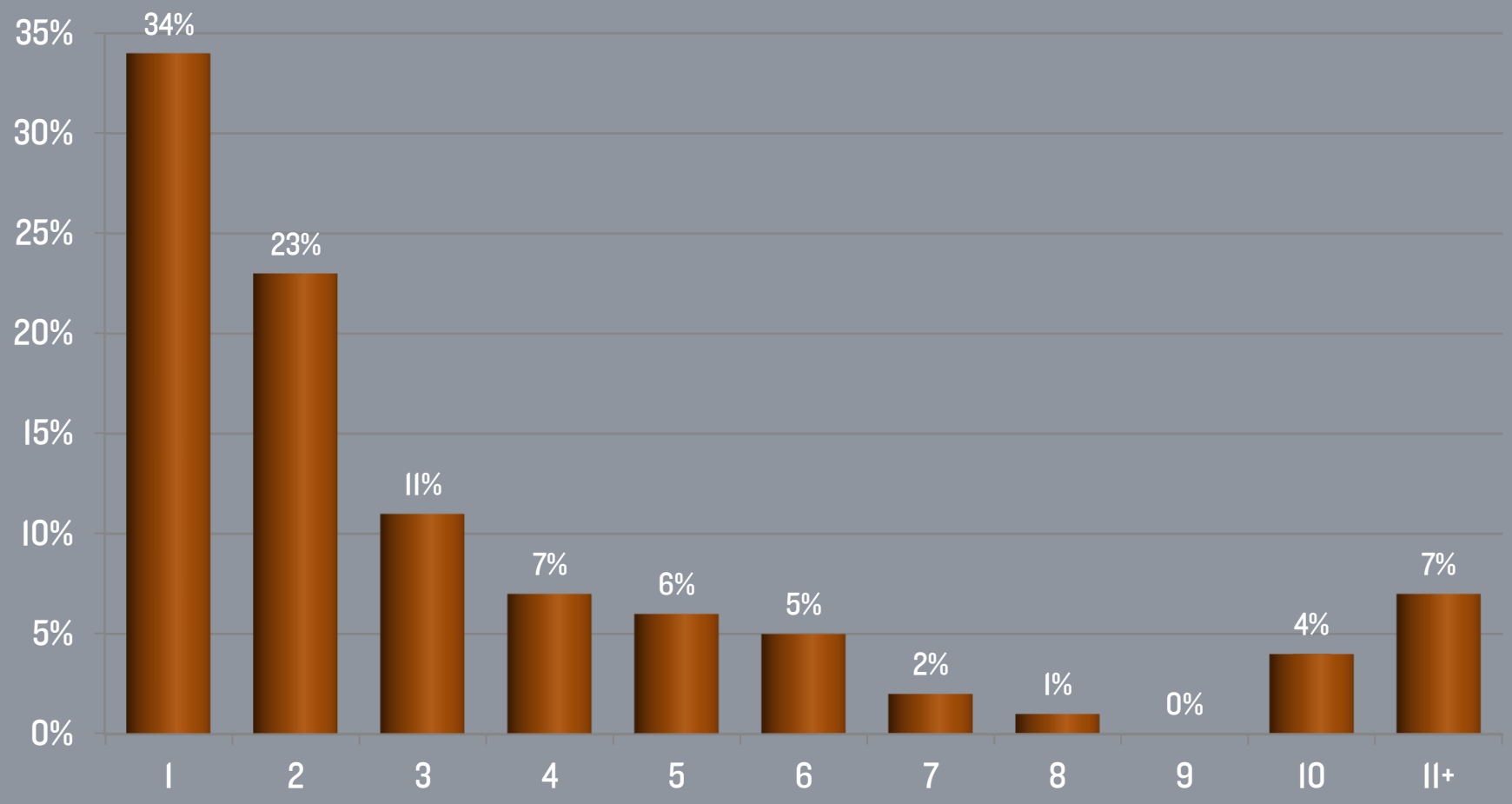
NUMBER OF VISITS TO CITY CREEK CENTER– LAST 12 MONTHS

Slightly more than 1 in 4 (27%) respondents visited City Creek at least once in the last 12 months. Another 40% of respondents visited 2 to 3 times. The remaining third of respondents (33%) visited 4 or more times.



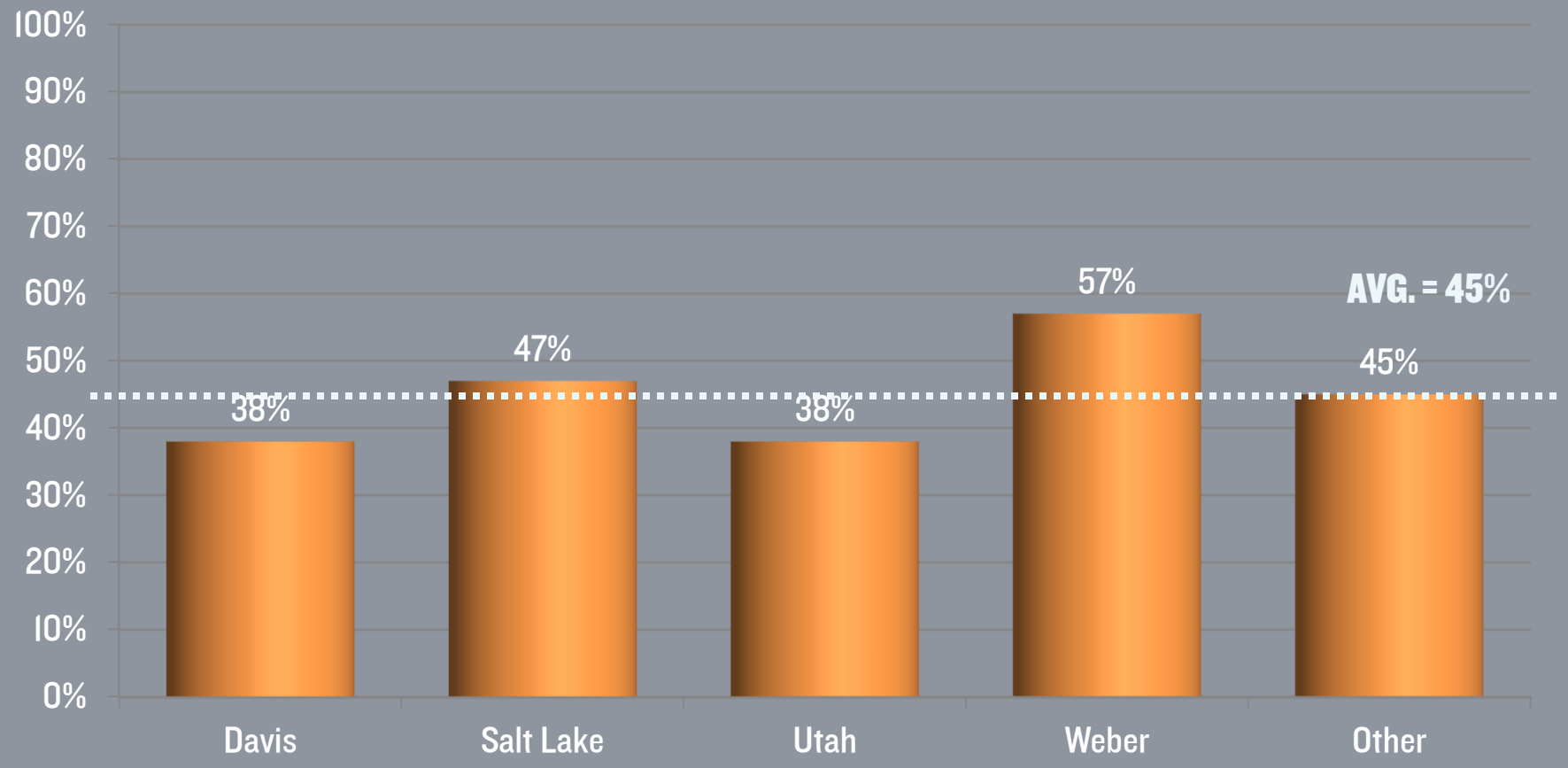
NUMBER OF VISITS TO THE GATEWAY – LAST 12 MONTHS

Slightly more than 1 in 3 (34%) respondents visited Gateway at least once in the last 12 months. Another third (34%) of respondents visited 2 to 3 times. The remaining third of respondents (32%) visited 4 or more times.



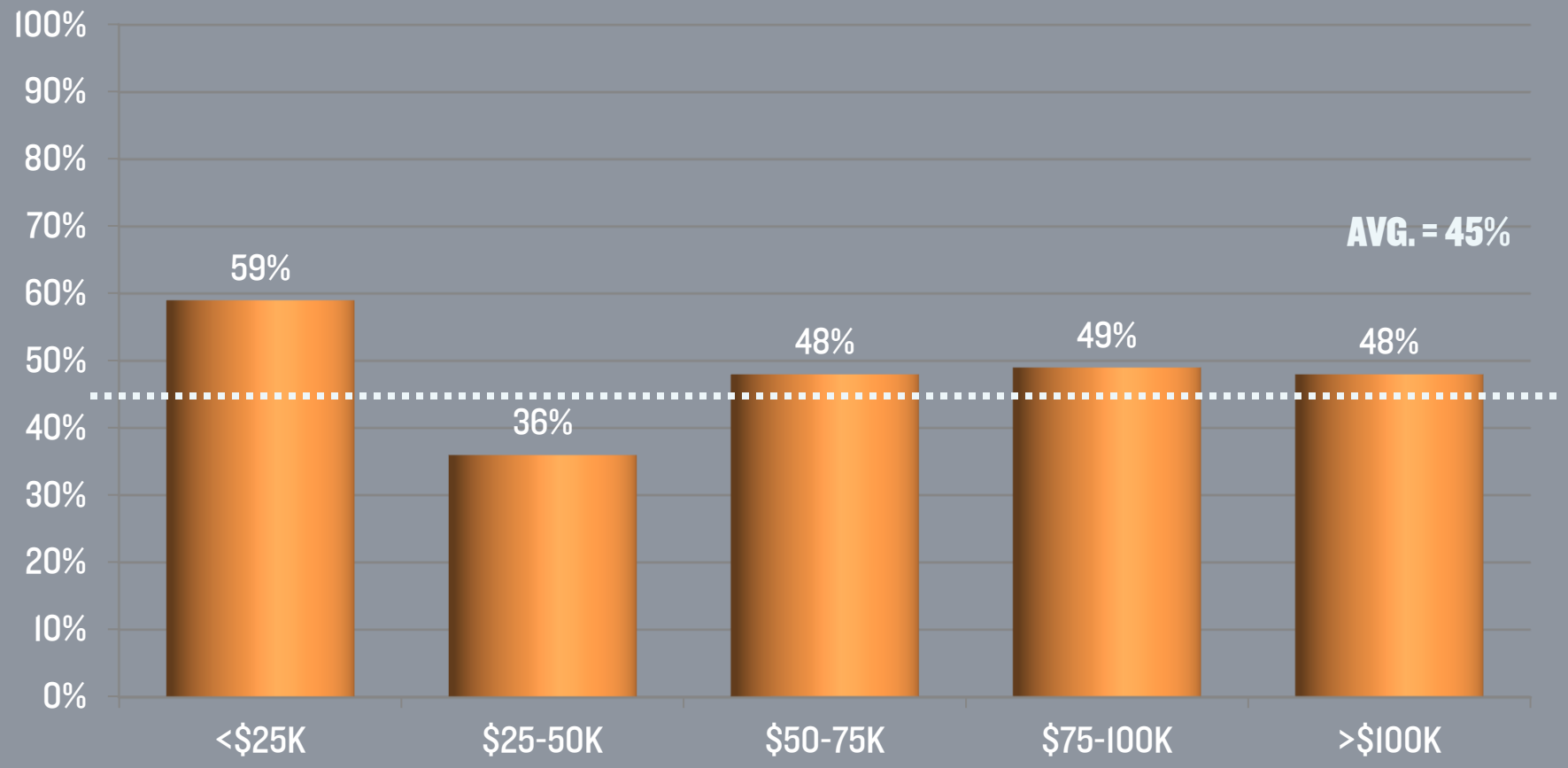
VISITORS EXPLORING BROADER DOWNTOWN (BY COUNTY)

Respondents from Weber County who explored the broader Downtown at 57% were much higher than the statewide average of 45%. Davis and Utah Counties were equal at 38% and below the average.



VISITORS EXPLORING BROADER DOWNTOWN (BY INCOME)

Respondents with household income less than $25K explored broader downtown the most at 59%. $25K–50K were the only HHI group below the statewide average. Those with HHI above $50K were slightly above average.



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