# DOWNTOWN ALLIANCE

## YEAR 3 BASELINE RESEARCH
## AUGUST/SEPTEMBER 2011

RICHTER7™

# RESEARCH OBJECTIVES

- Measure current levels of interest in, visitation, and awareness of downtown Salt Lake City
- Compare 2011 levels to observed 2009 and 2010 benchmarks
- Understand primary motivations and barriers to downtown visitation, including community sentiment regarding the downtown area
- Gauge community sentiment regarding downtown development projects
- Deliver recommendations for brand positioning and communication strategies

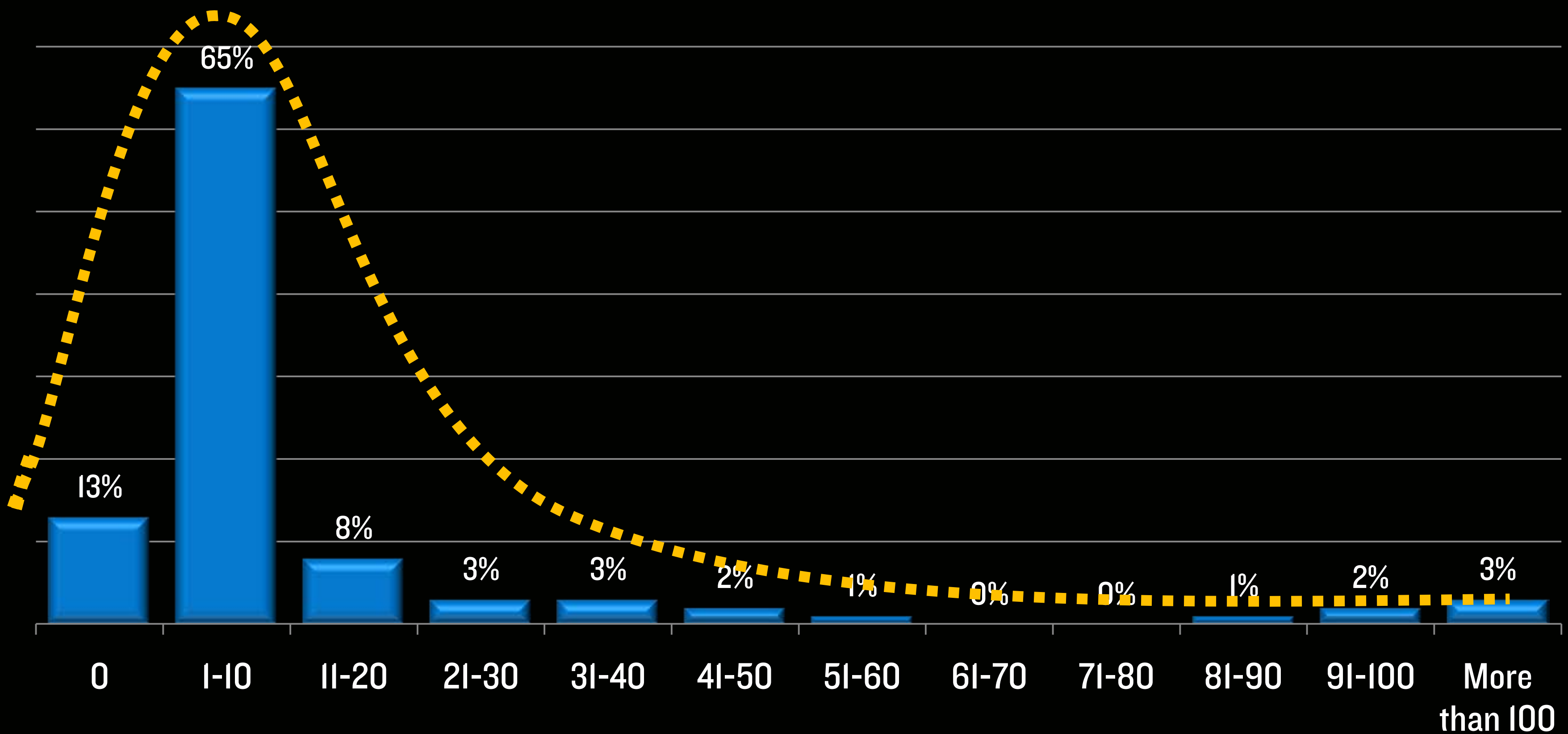
# RESEARCH METHODOLOGY

- 8-10 minute telephone survey (shortened from last year's 12-14 minute questionnaire)
  - 402 completed surveys
  - Representative of adult population throughout Utah
  - Low response volume in rural counties reflective of statewide population distribution (did not oversample)
  - 4.89% margin of error at 95% confidence level

    +/- 6.4% at 99% confidence level
- Data collection facilitated by Lighthouse Research
- Data analysis and strategic recommendations by Richter7

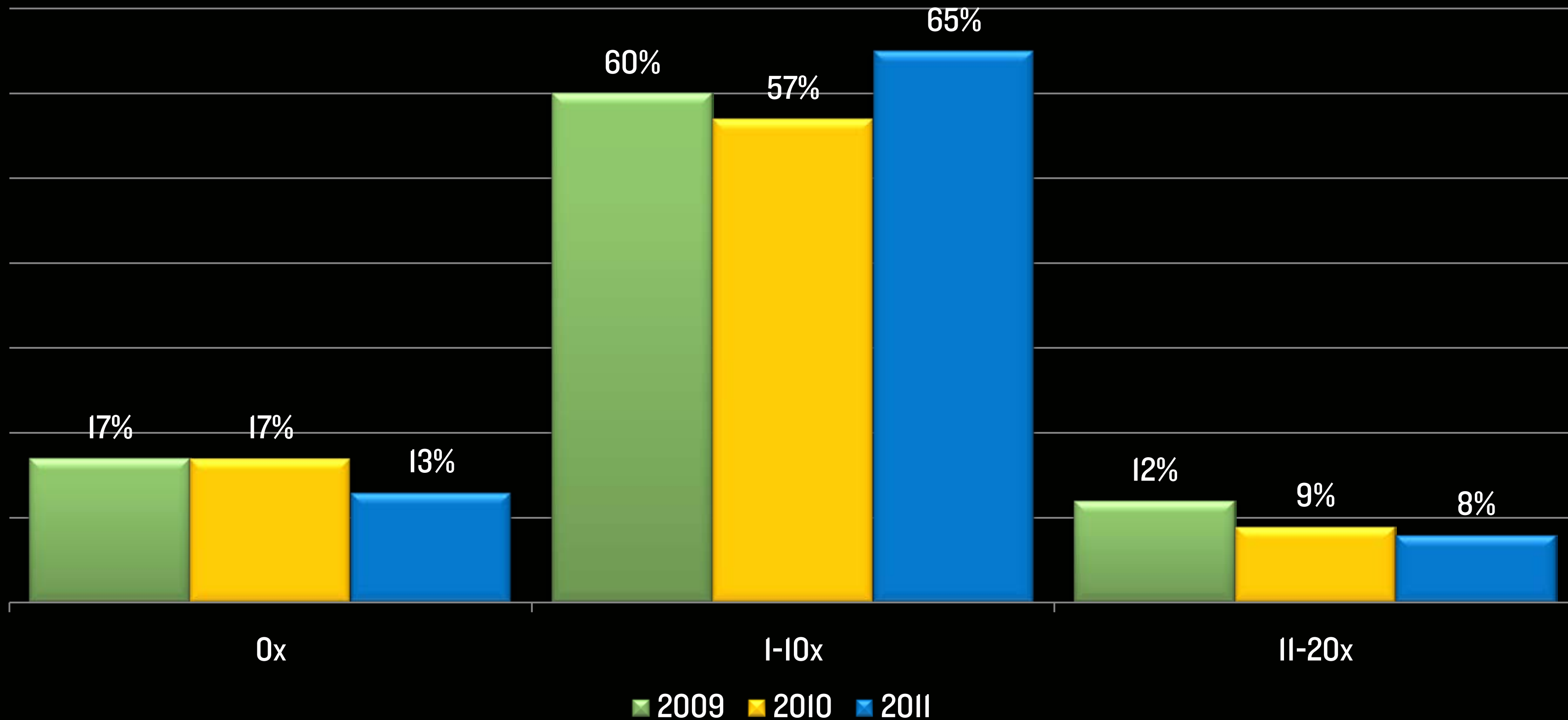
# MOST LOCALS VISIT 1-10x OVER 6 MONTHS

Among all respondents, 65% said they had visited downtown Salt Lake 1-10 times in the last six months. Another 8% had visited 11-20 times in that same period.



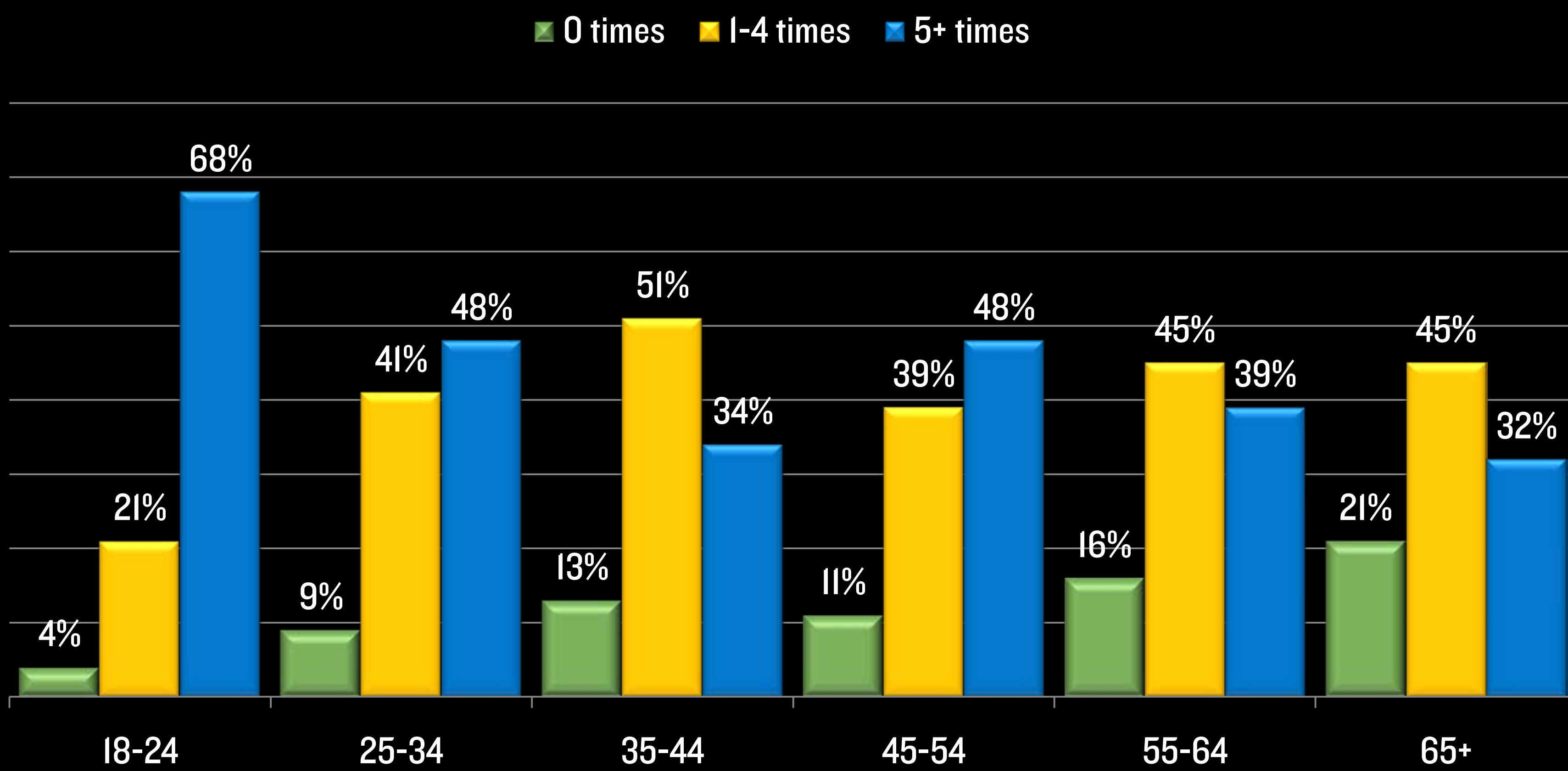
# VISITATION INCREASED YEAR OVER YEAR

According to survey respondents, 65% of people visited downtown SLC 1-10 times in the past six months in 2011; eight percentage points higher than in 2010 and five points higher than 2009. Fewer people also stated they had not visited downtown.



# VISITATION BY AGE

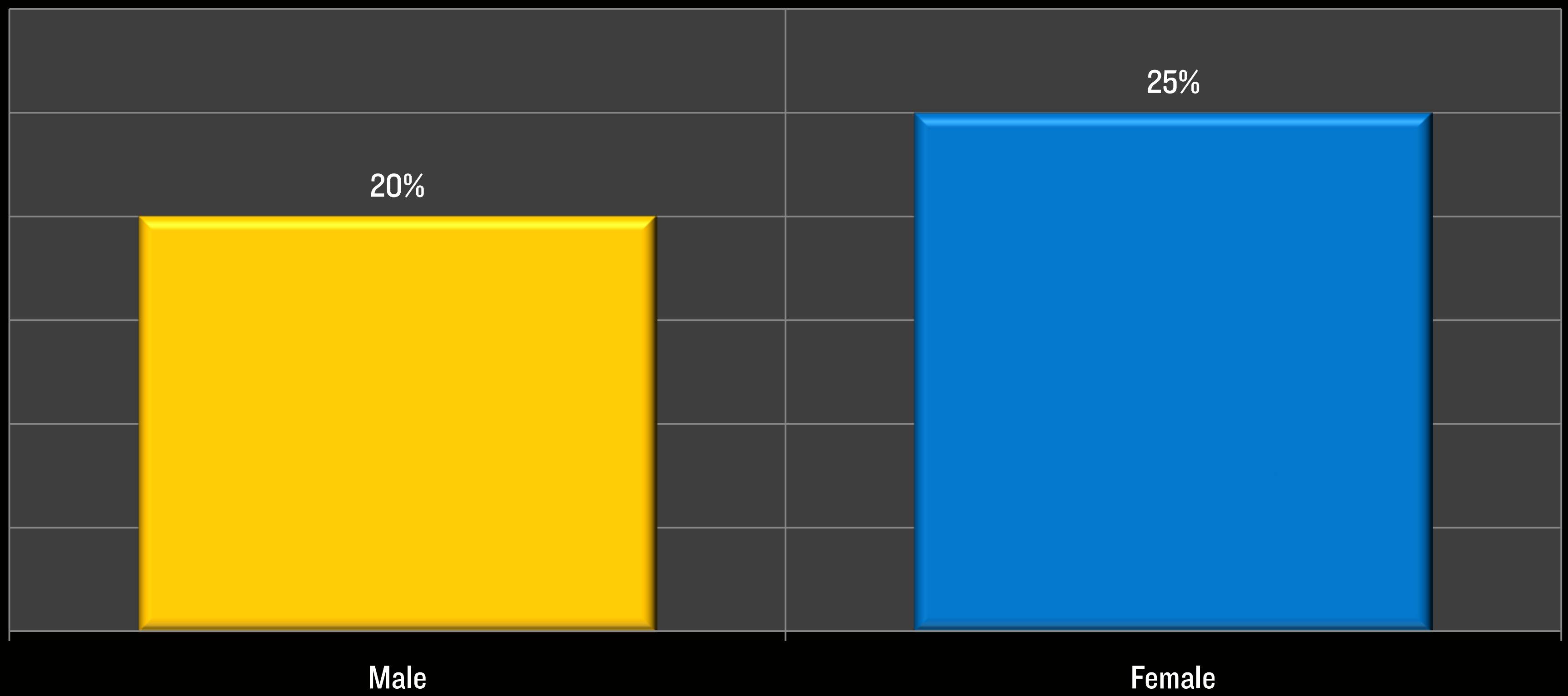
68% of 18-24 years olds indicated they had visited downtown SLC 5 or more times in the past six months, markedly higher than any other frequency or age group.



# INTEREST IN DOWNTOWN SLC

**BY GENDER**

Measured as those who rated their interest as an 8, 9, or 10 (on a ten point scale, with one being "not at all interested" and ten being "very interested") for all downtown attractions, events, and activities.



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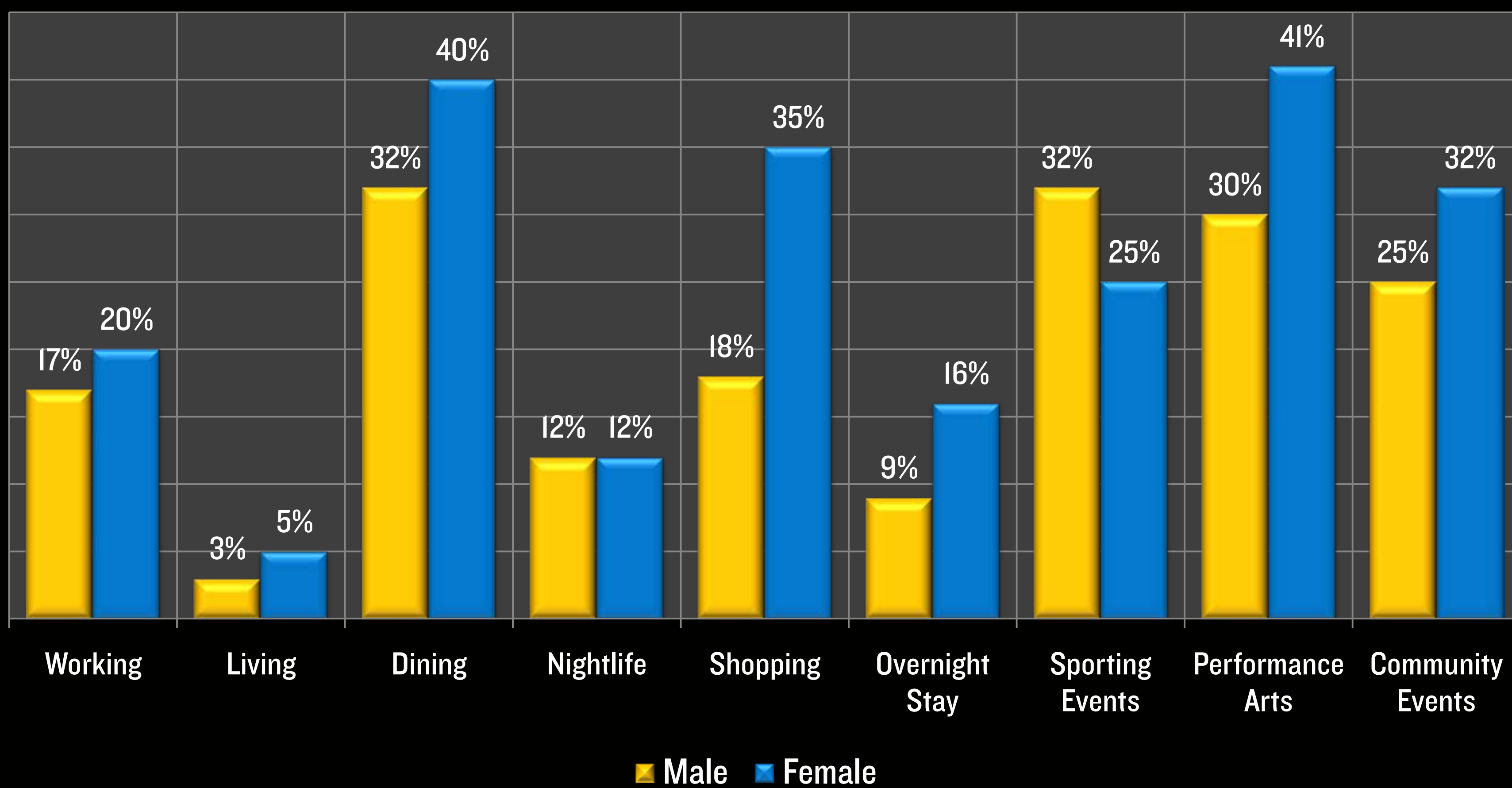

# INTEREST IN DOWNTOWN SLC

BY COUNTY

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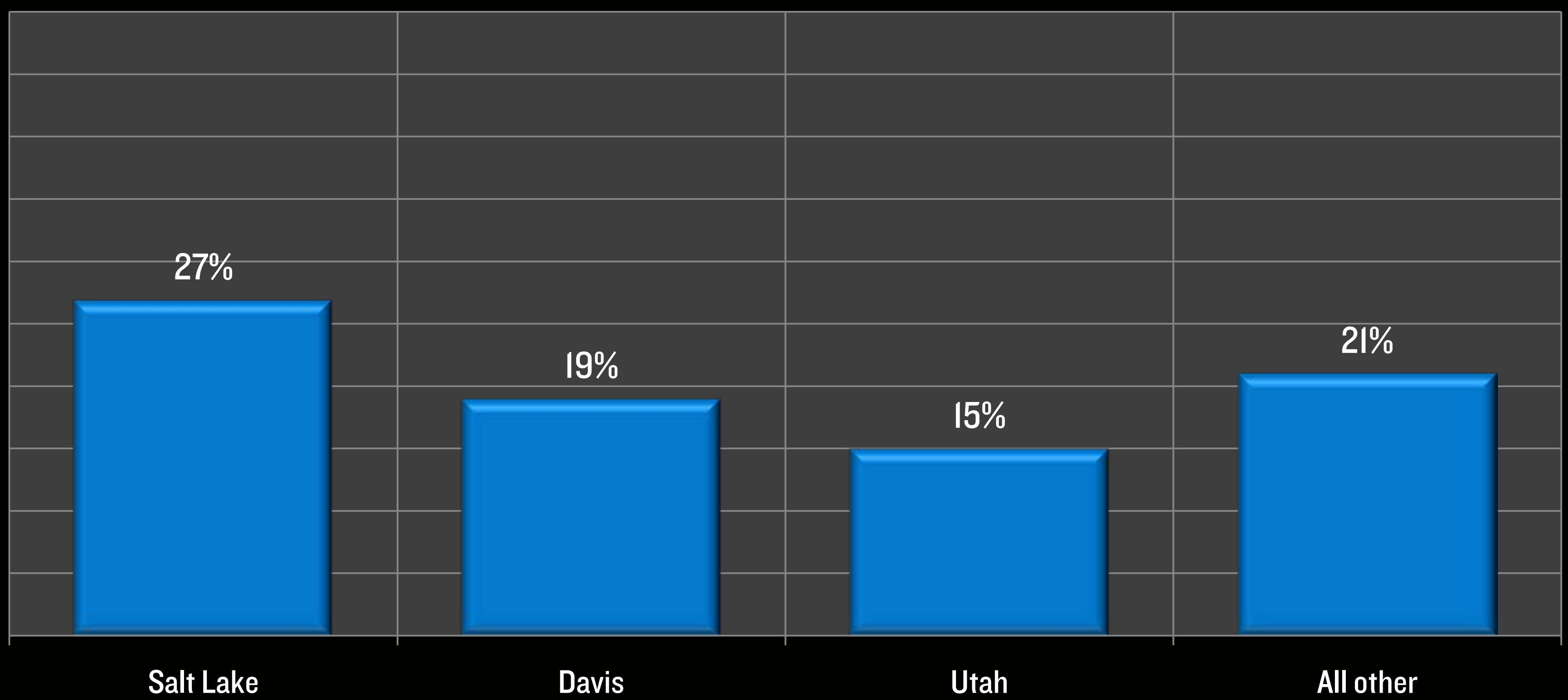
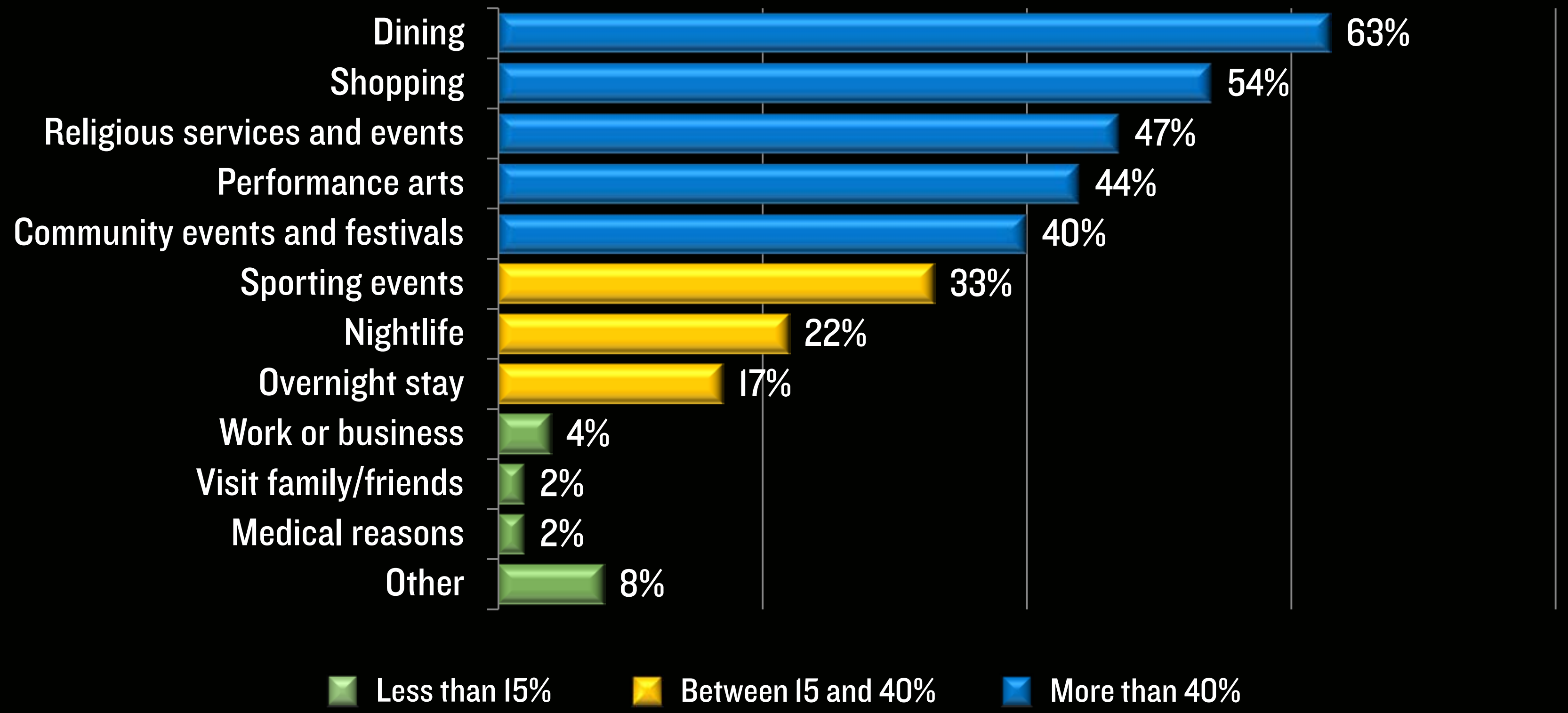


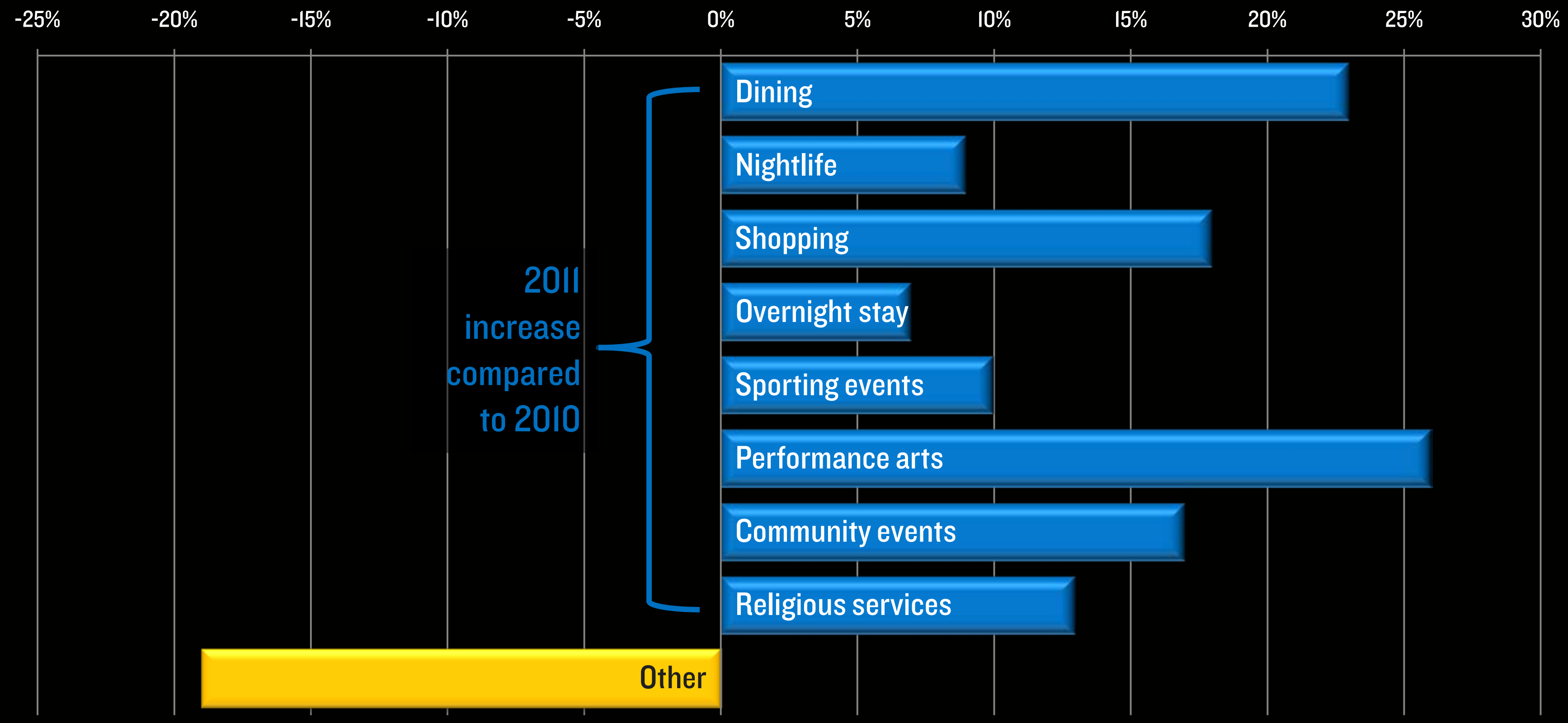
# DINING & SHOPPING BRING THE CROWDS

The most popular reason for visiting downtown Salt Lake was dining at 63%. Shopping was the second most-mentioned reason for visiting downtown at 54%, and 47% said they had visited for religious services and/or events. Performance arts and community festivals were the other most frequently cited activities.



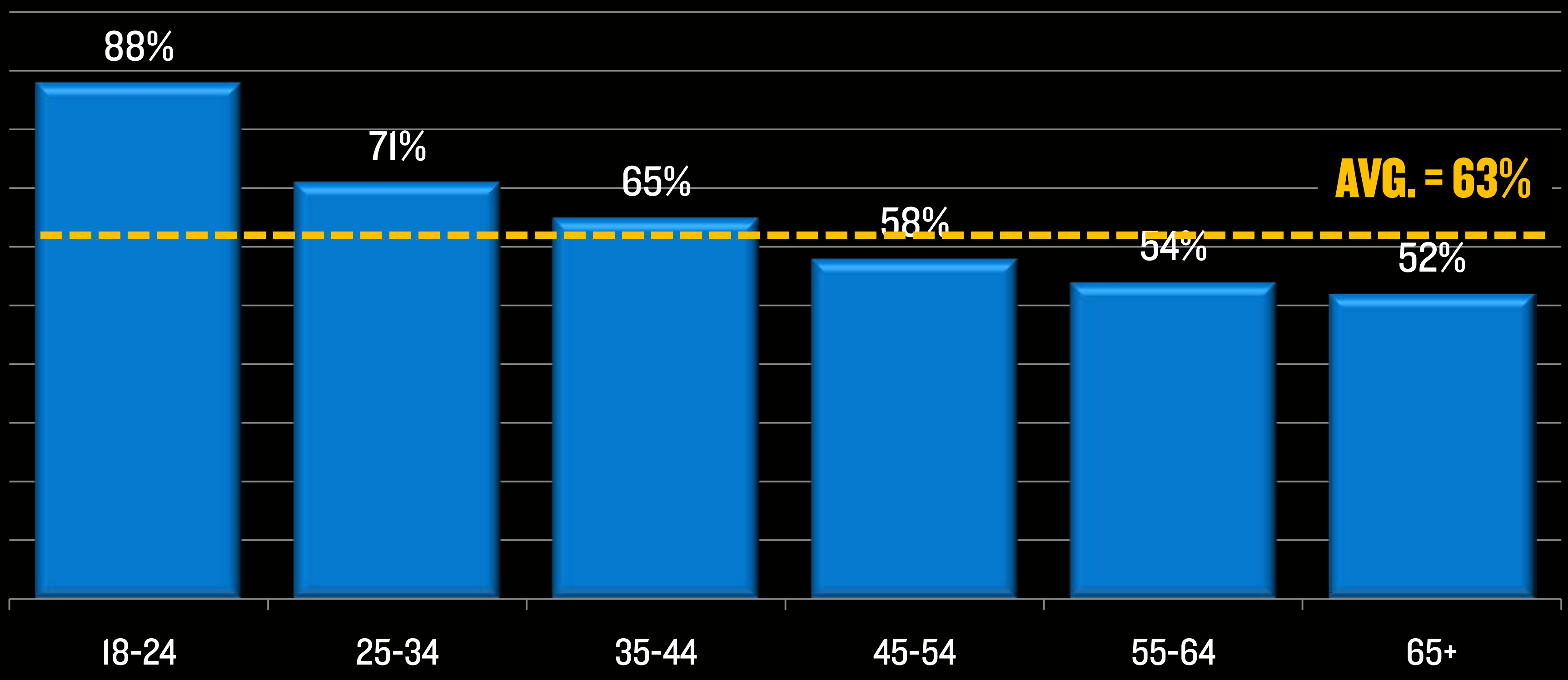
# Y.O.Y. INCREASES ACROSS THE BOARD

According to survey responses, all major categories of reasons for visiting downtown Salt Lake City increased in 2011 compared to the prior year. The biggest gains were for performance arts (44% in 2011 vs. 18% in 2010), and dining (63% vs. 40%). Shopping and community events/festivals also saw significant year-over-year gains.



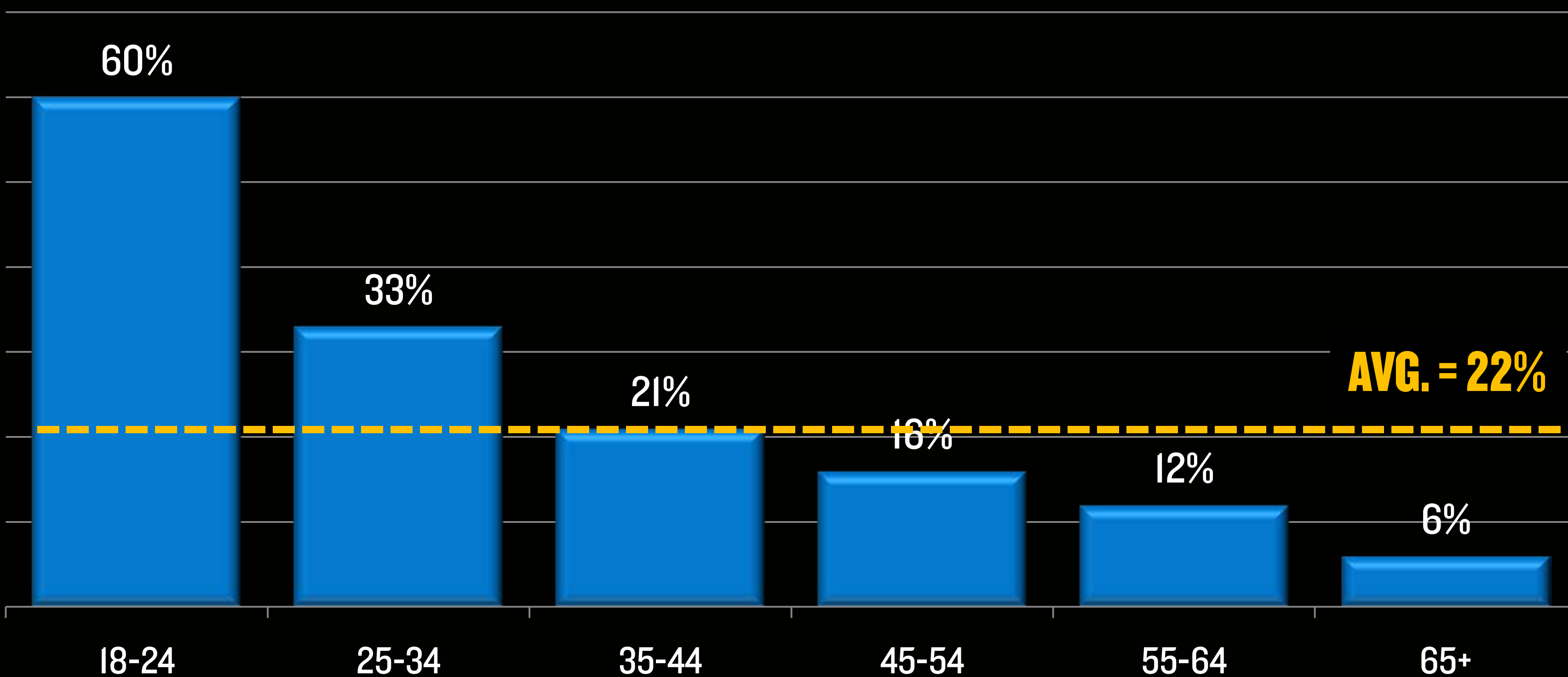
# DINING BY AGE

Those who mentioned they had visited downtown SLC at least once for dining in the last six months were more likely to be younger respondents, below the age of 44.



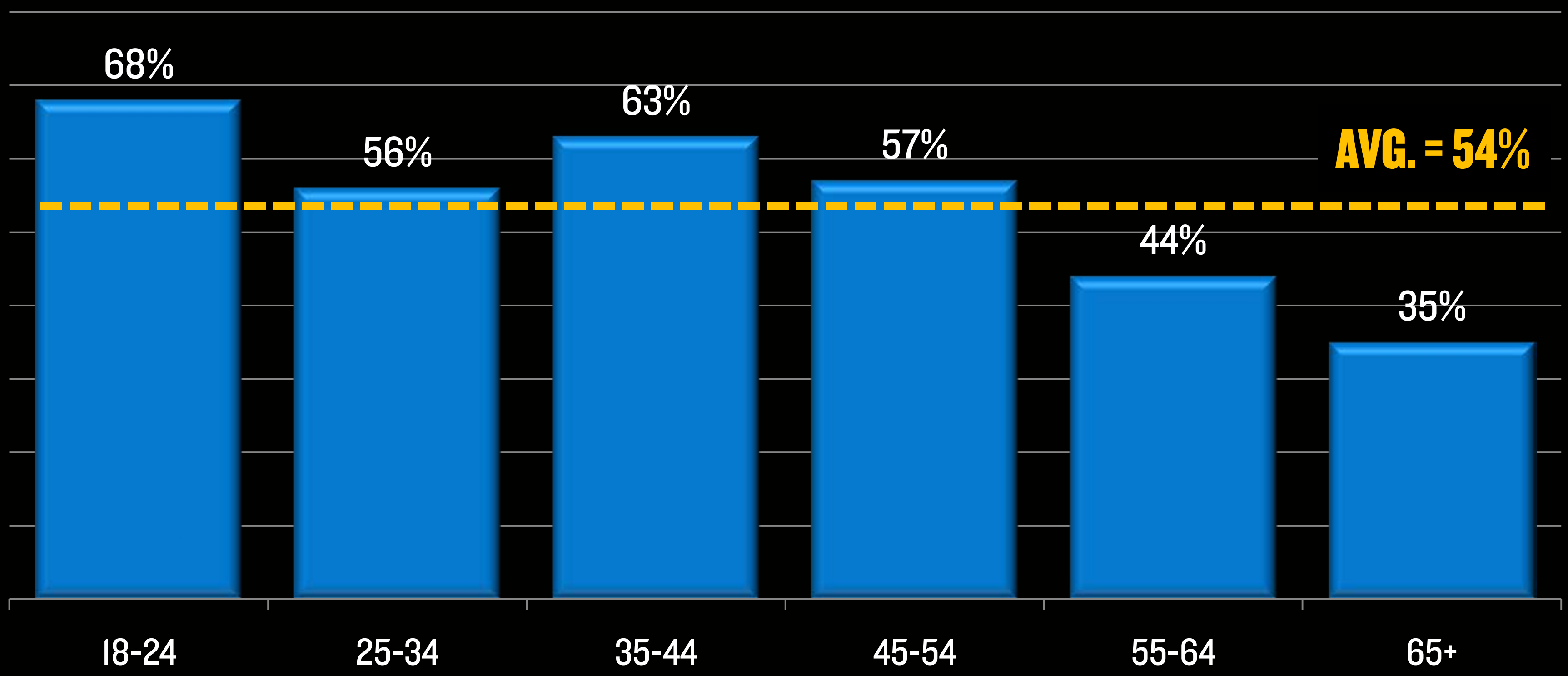
# NIGHTLIFE BY AGE

Those who mentioned they had visited downtown SLC at least once for nightlife in the last six months were more likely to be younger respondents, below the age of 35.



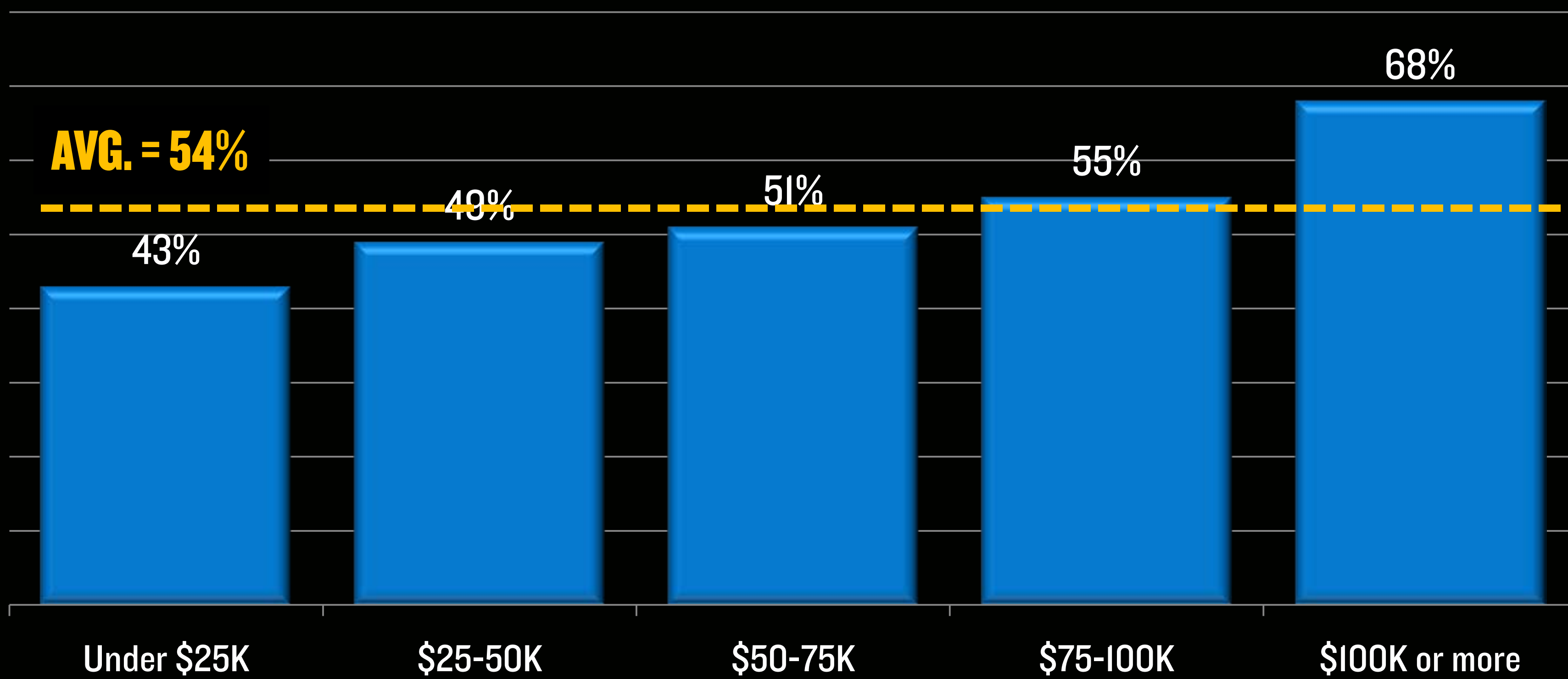
# SHOPPING BY AGE

Respondents ages 18-54 were more likely to indicate they had visited downtown SLC at least once for shopping in the last six months.



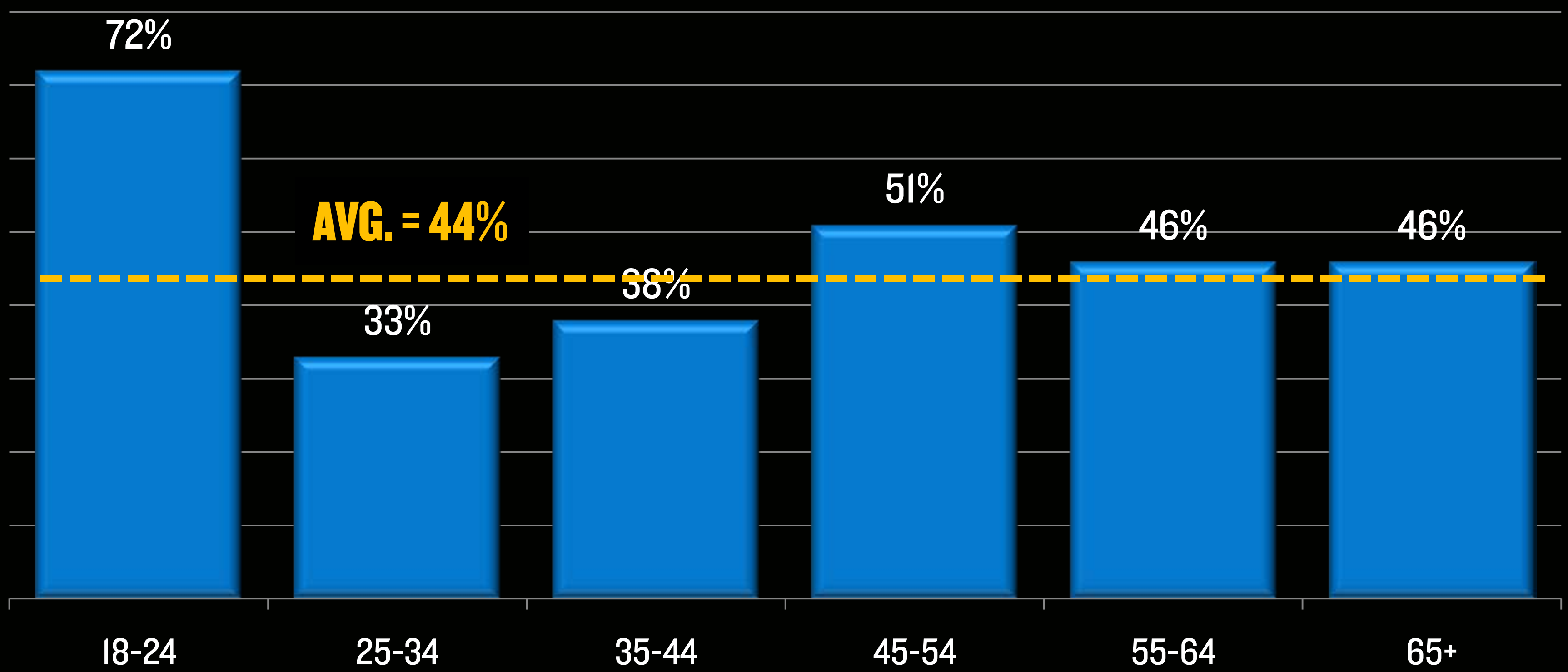
# SHOPPING BY HH INCOME

Respondents with higher household incomes, defined as $75,000 or more annually, were more likely to indicate they had visited downtown SLC at least once for shopping in the last six months.



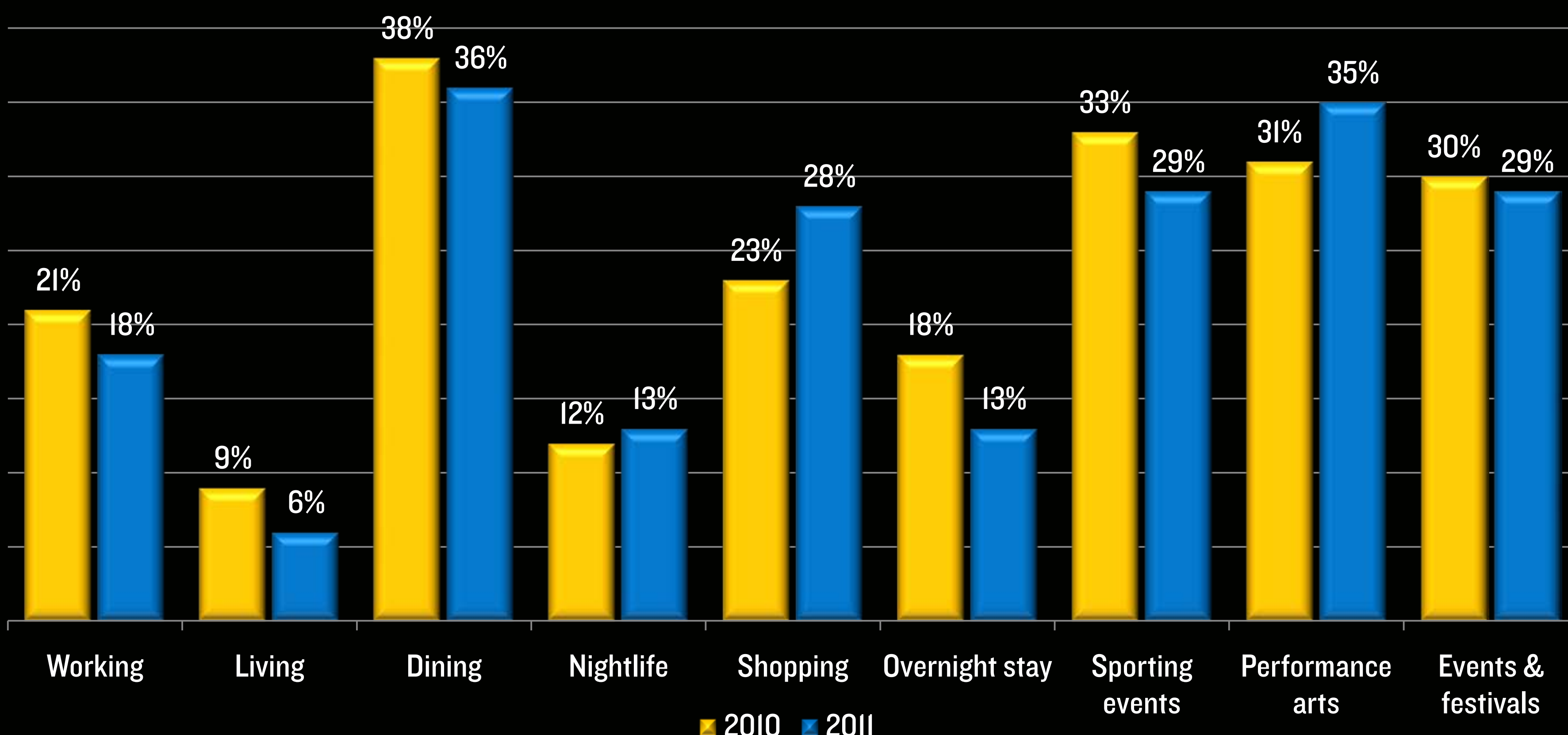
# PERFORMANCE ARTS BY AGE

Those who mentioned they had visited downtown SLC at least once to attend performance arts events were slightly more likely to be over the age of 45. 18-24 year-olds also had a high response rate, but a slightly smaller sample size in that age group may be skewing results.



# INTEREST IN DOWNTOWN EXPERIENCES

Interest in overall downtown experiences has generally remained consistent to 2010 levels.



# INTEREST IN LIVING DOWNTOWN

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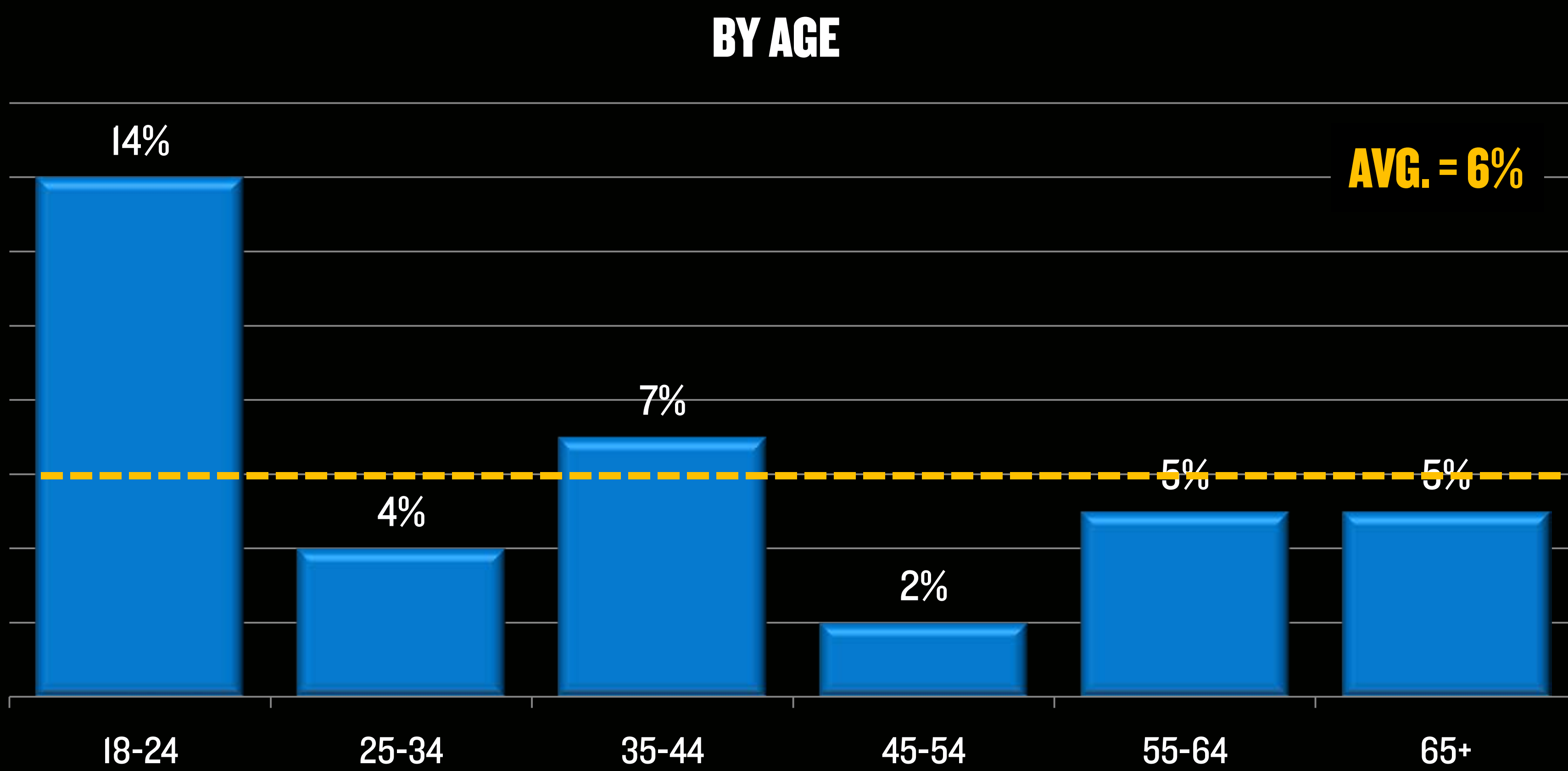
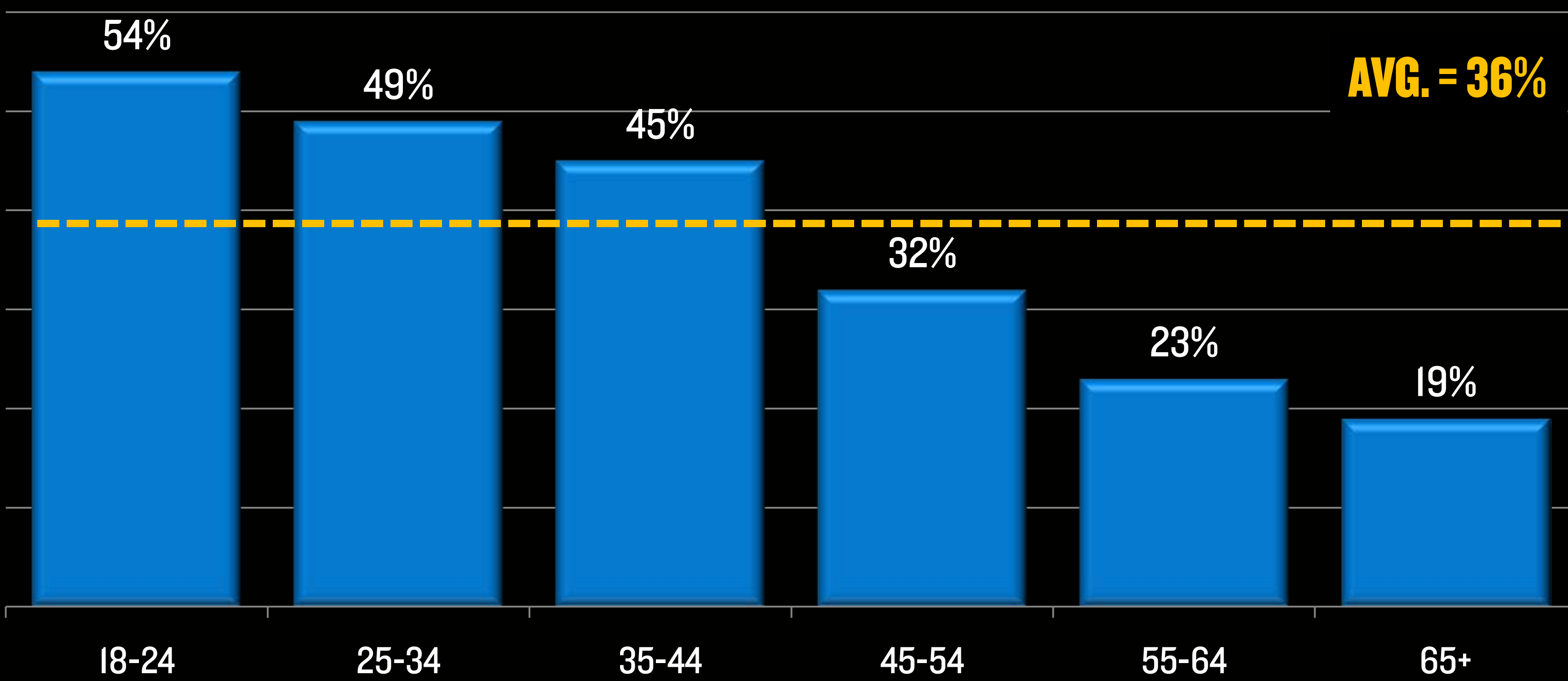


# INTEREST IN DINING DOWNTOWN

Measured as those who rated their interest as an 8, 9, or 10 (on a scale of 1-10, with 1 being "not at all interested" and 10 being "very interested").

## BY AGE



# INTEREST IN NIGHTLIFE DOWNTOWN

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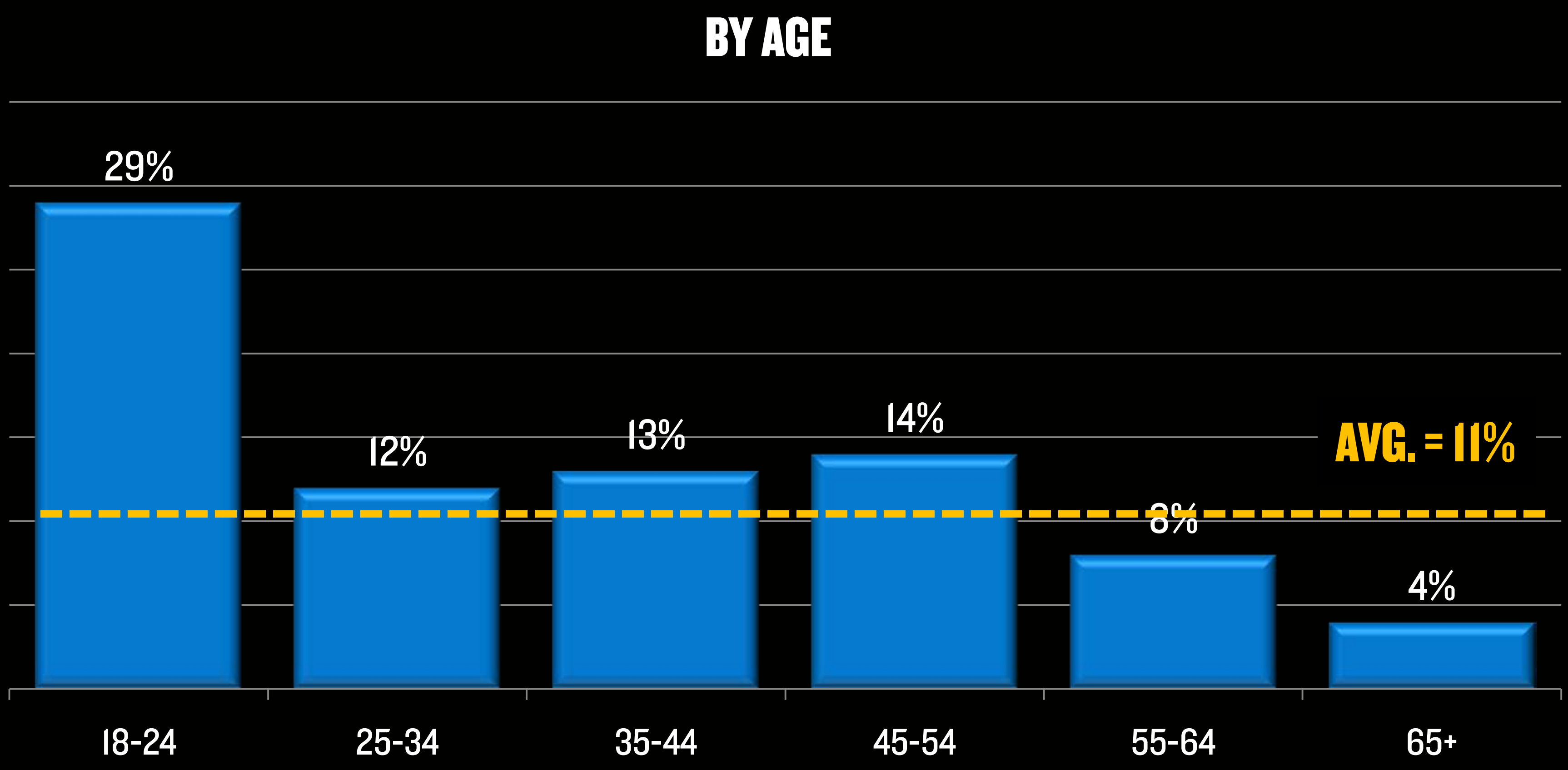

# INTEREST IN SHOPPING DOWNTOWN

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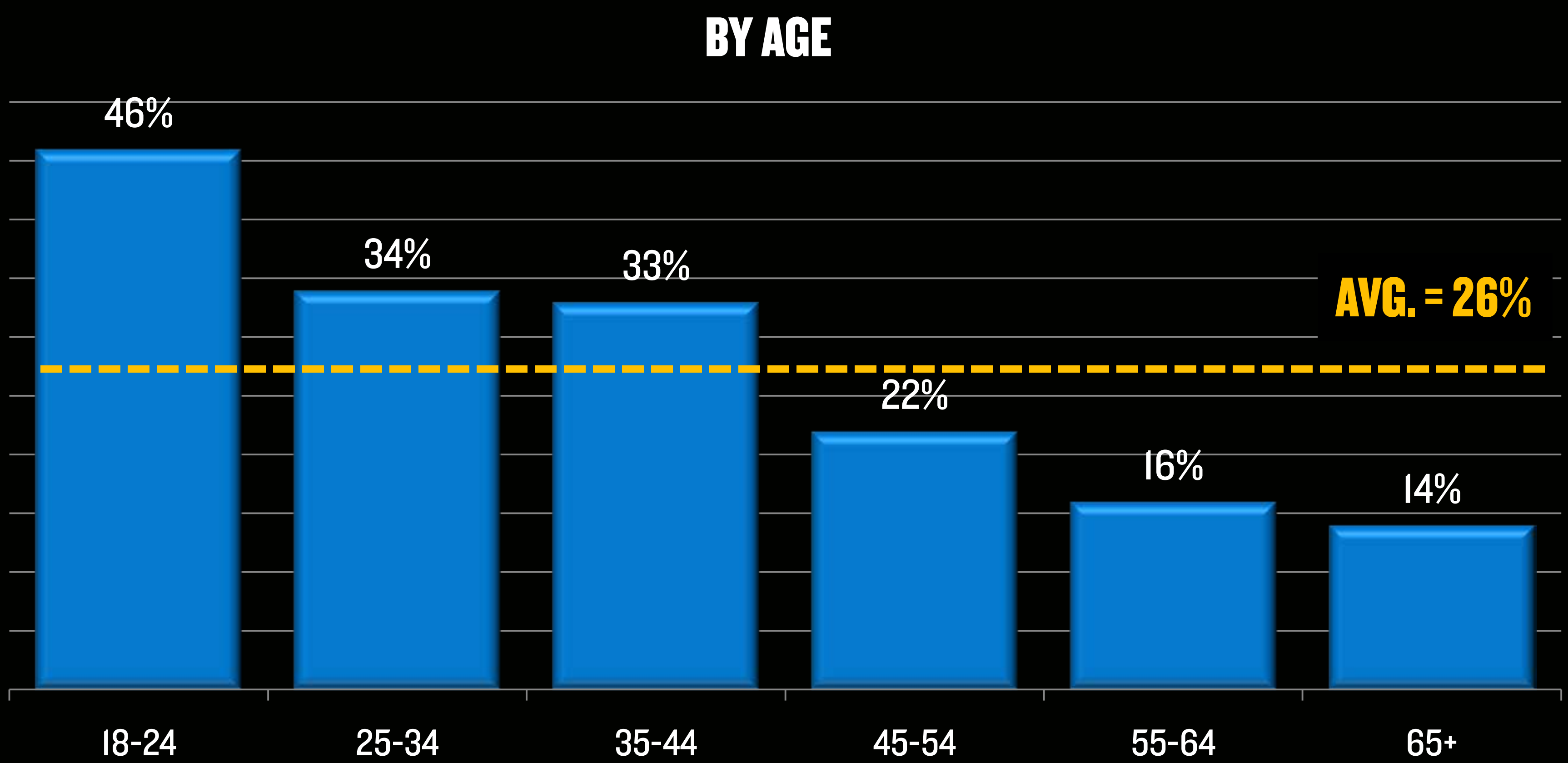

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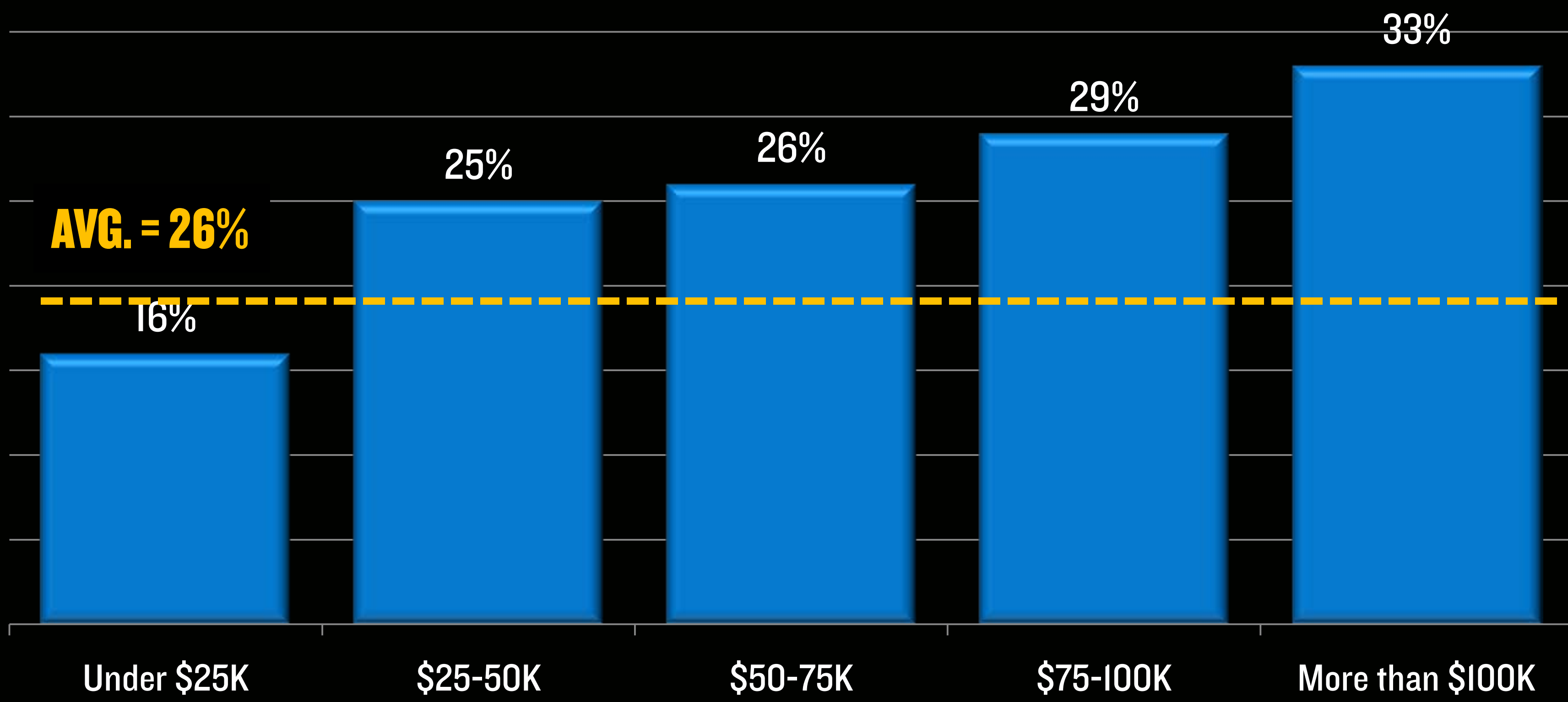
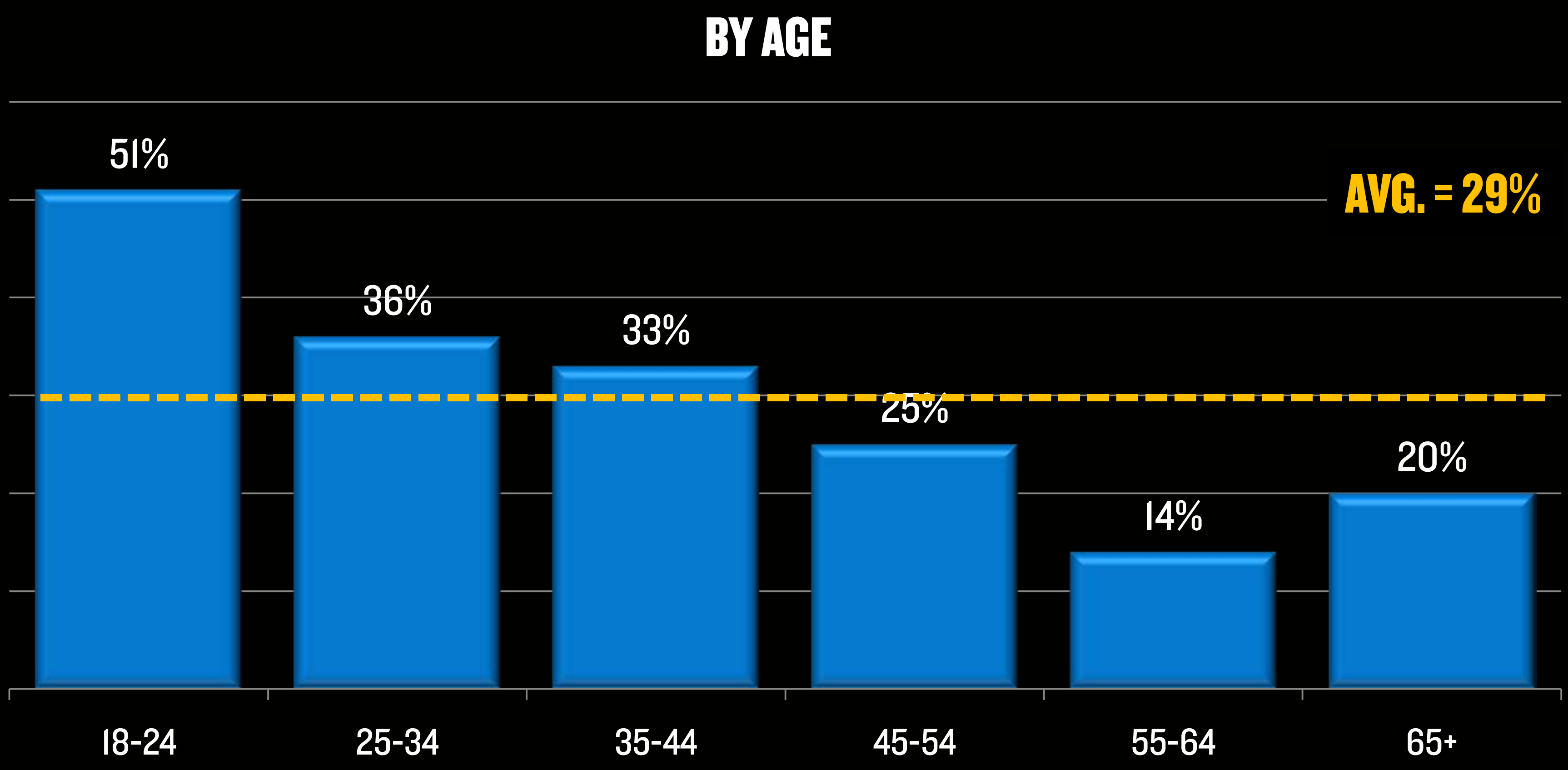
## BY ANNUAL HOUSEHOLD INCOME



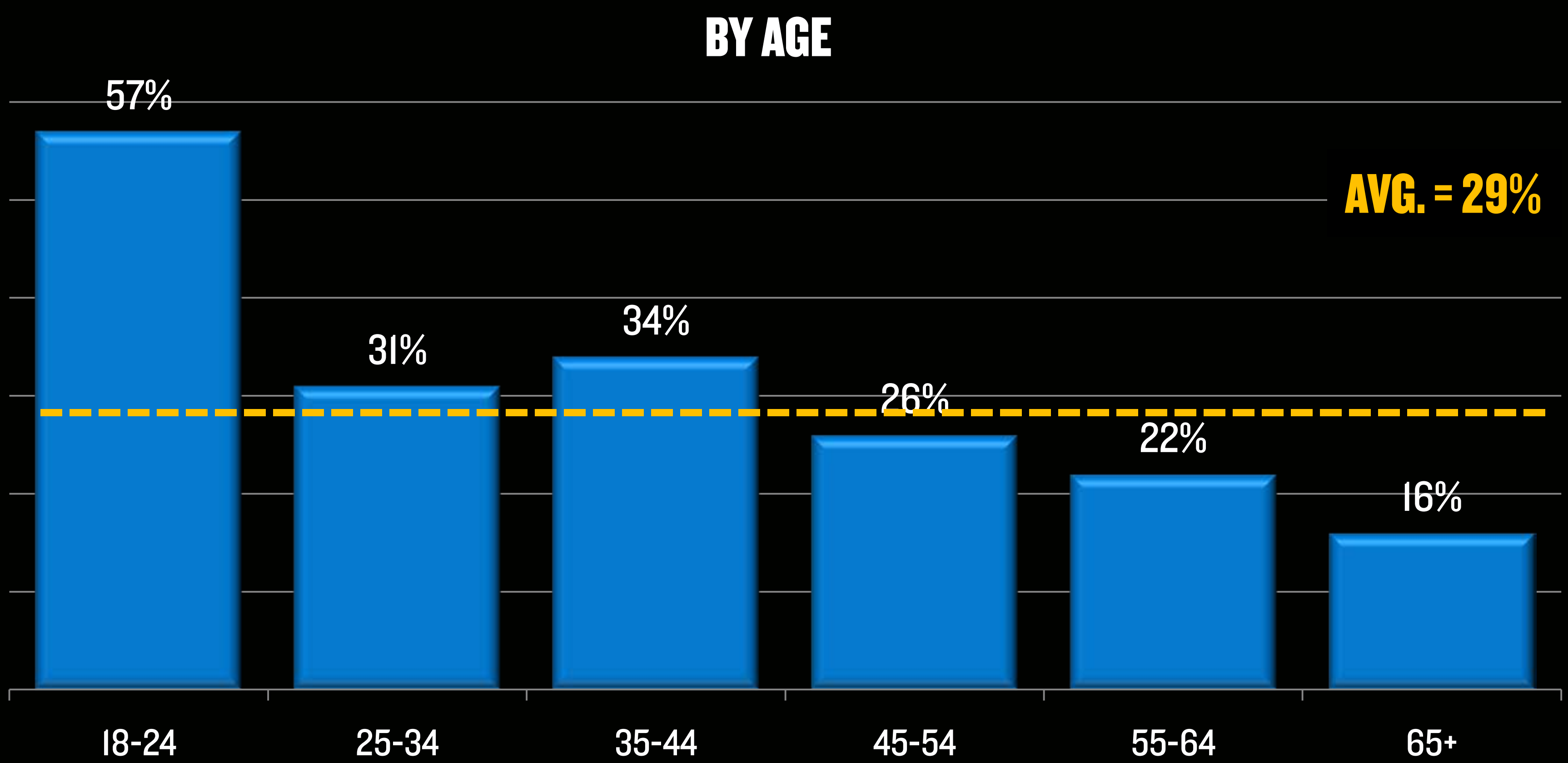
# INTEREST IN SPORTING EVENTS DOWNTOWN

Measured as those who rated their interest as an 8, 9, or 10 (on a scale of 1-10, with 1 being "not at all interested" and 10 being "very interested").



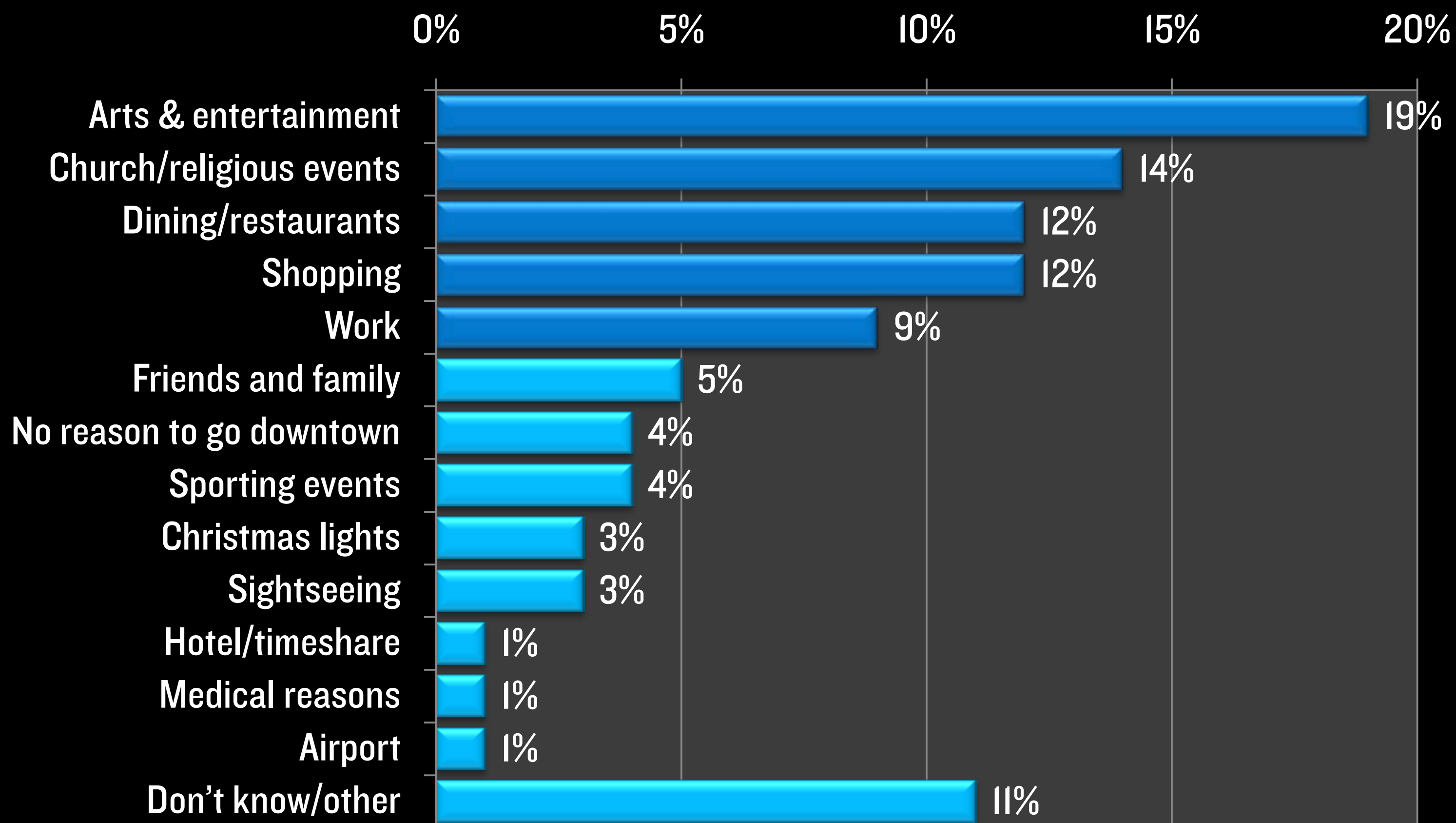
# INTEREST IN COMMUNITY EVENTS

Measured as those who rated their interest as an 8, 9, or 10 (on a scale of 1-10, with 1 being “not at all interested” and 10 being “very interested”).



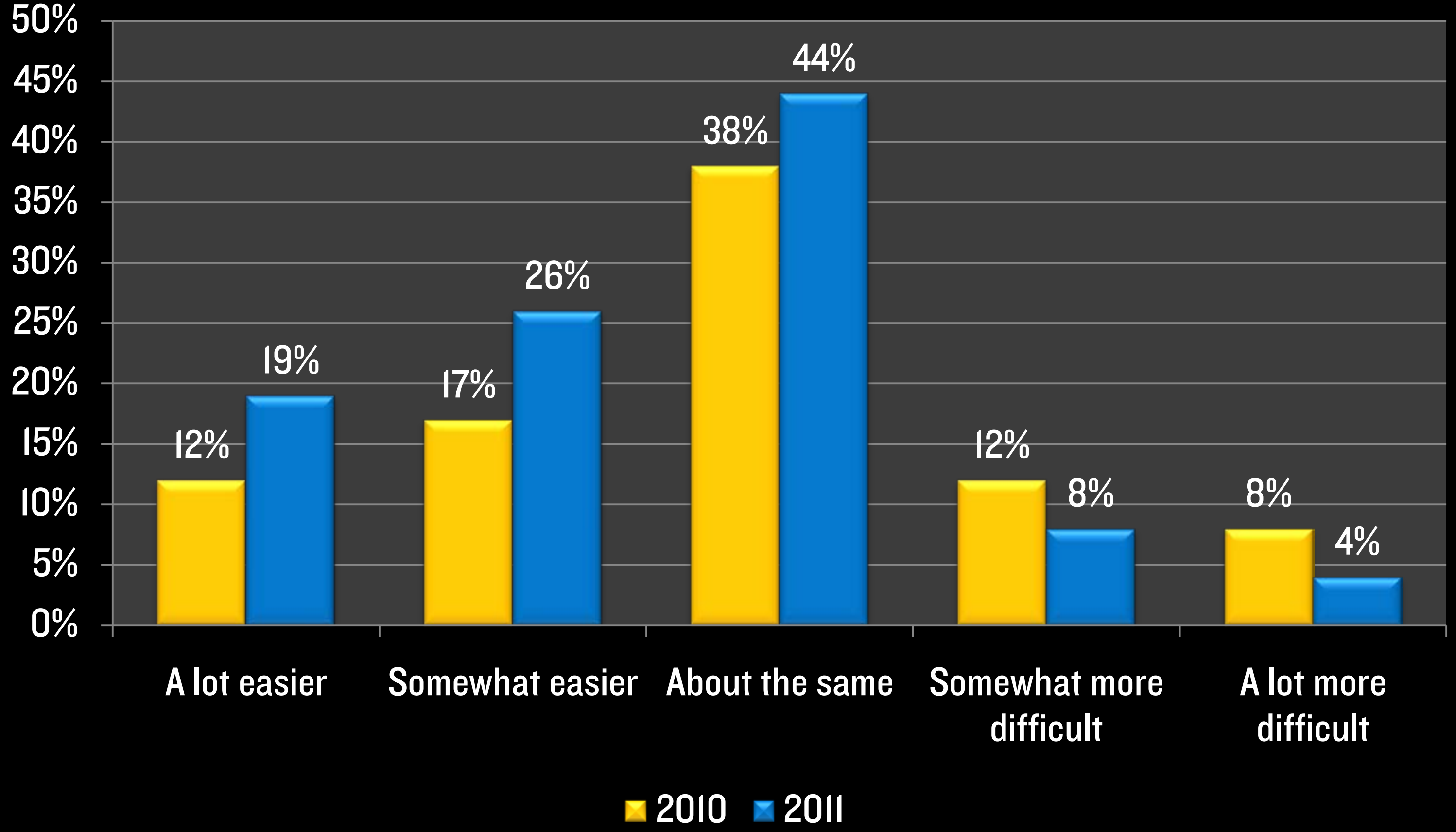
# ARTS & ENTERTAINMENT ARE THE BIGGEST MOTIVATORS FOR VISITING DOWNTOWN

When asked what the biggest motivators for coming to downtown Salt Lake would be (open-ended), 19% indicated arts & entertainment, including theatre, concerts, festivals, and events. Church and religious events were mentioned 14% of the time, dining/restaurants, and shopping 12% of the time.



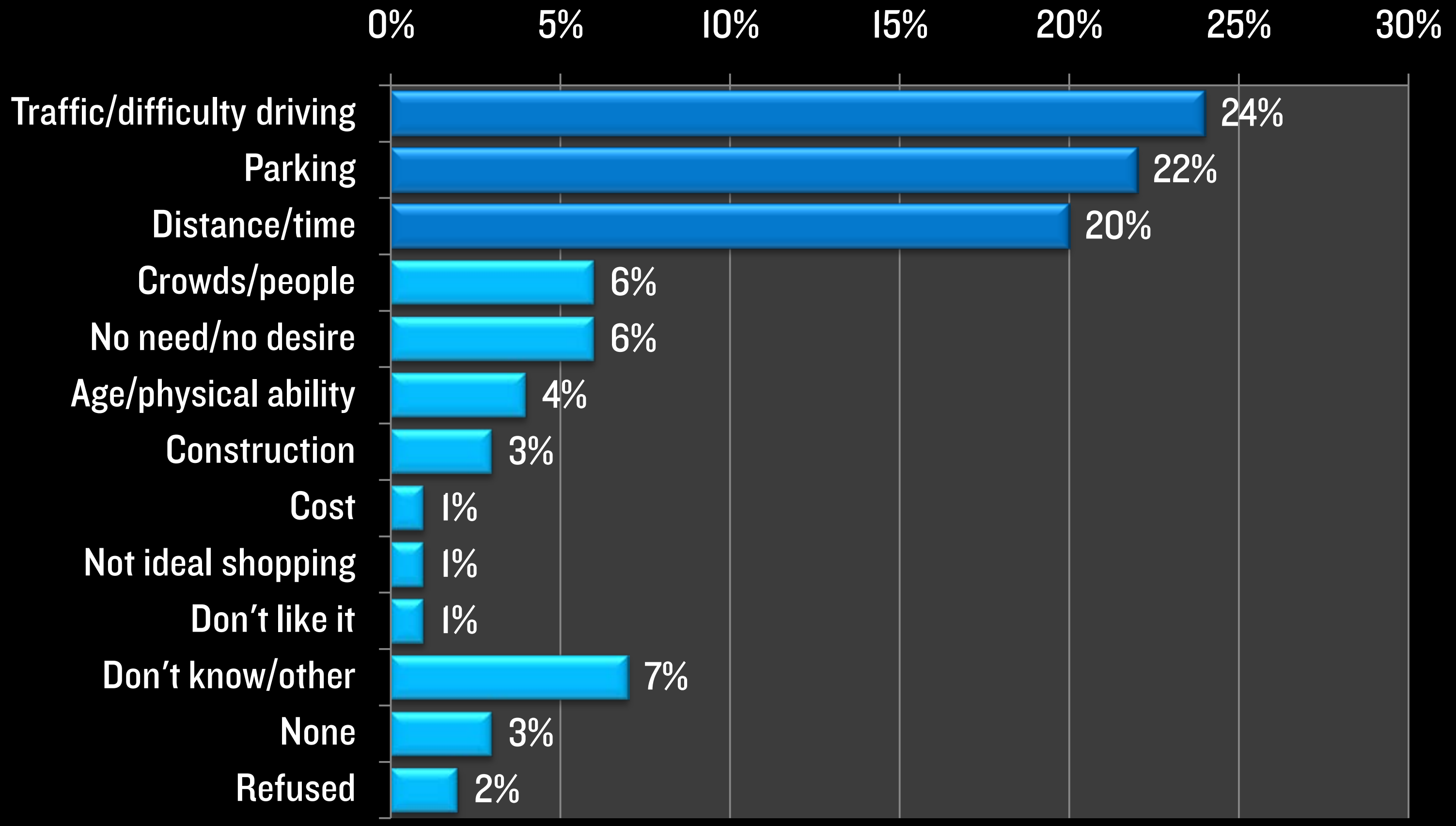
# RESIDENTS FEEL TRAVELING TO AND IN DOWNTOWN SLC HAS IMPROVED

When asked whether it was easier to get around and commute to downtown Salt Lake now as opposed to 12 months ago, 19% said it was a lot easier and 26% said it was somewhat easier. Both are gains on top of improved community perceptions observed in 2010.



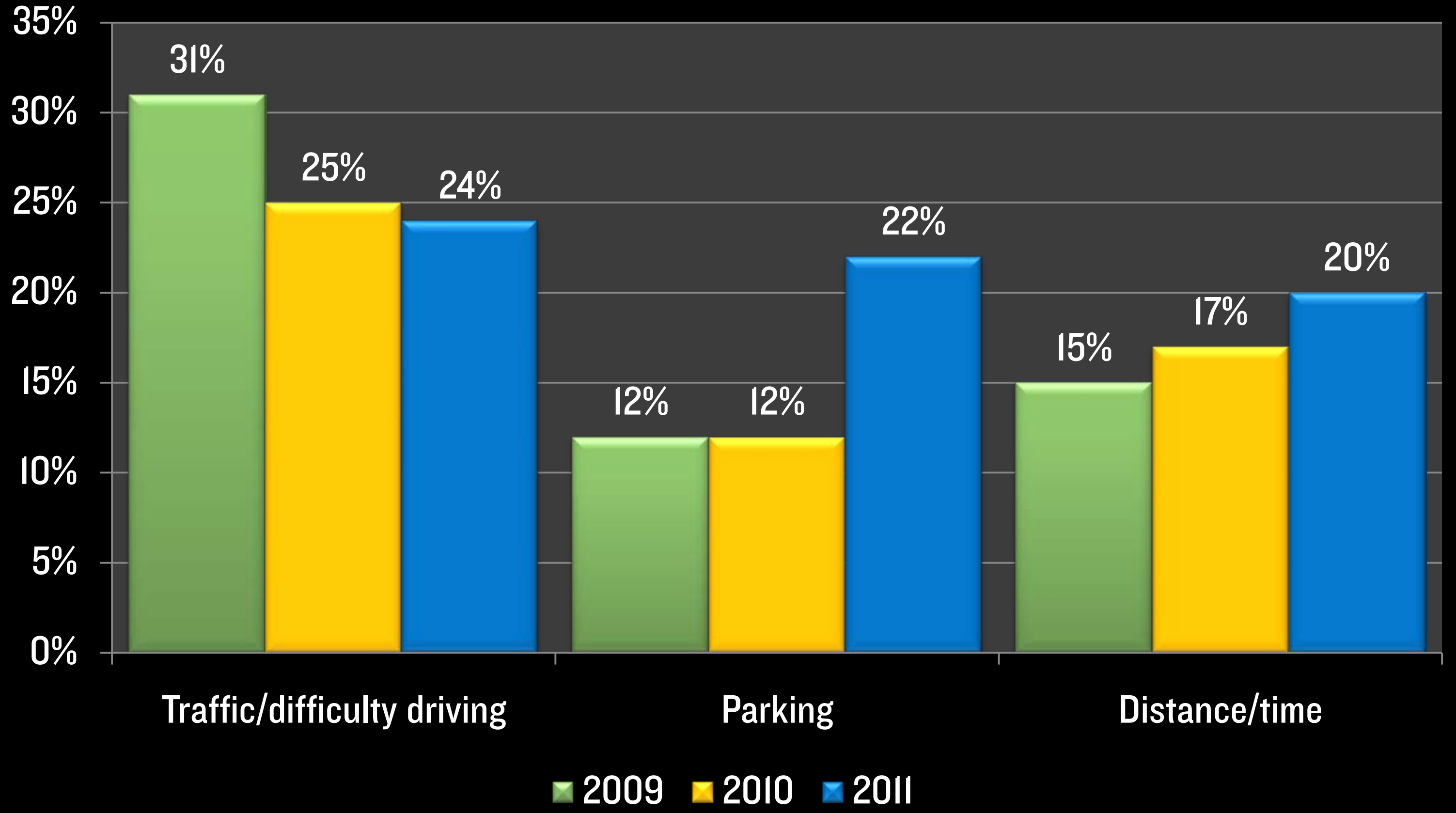
# TRAFFIC & PARKING CONTINUE TO BE THE BIGGEST DETERRENTS FOR DOWNTOWN

When asked what the biggest deterrents for coming to downtown Salt Lake would be (open-ended), 24% indicated traffic and driving difficulty was their primary concern, with another 22% indicating parking (cost, availability, and convenience) was a major barrier.



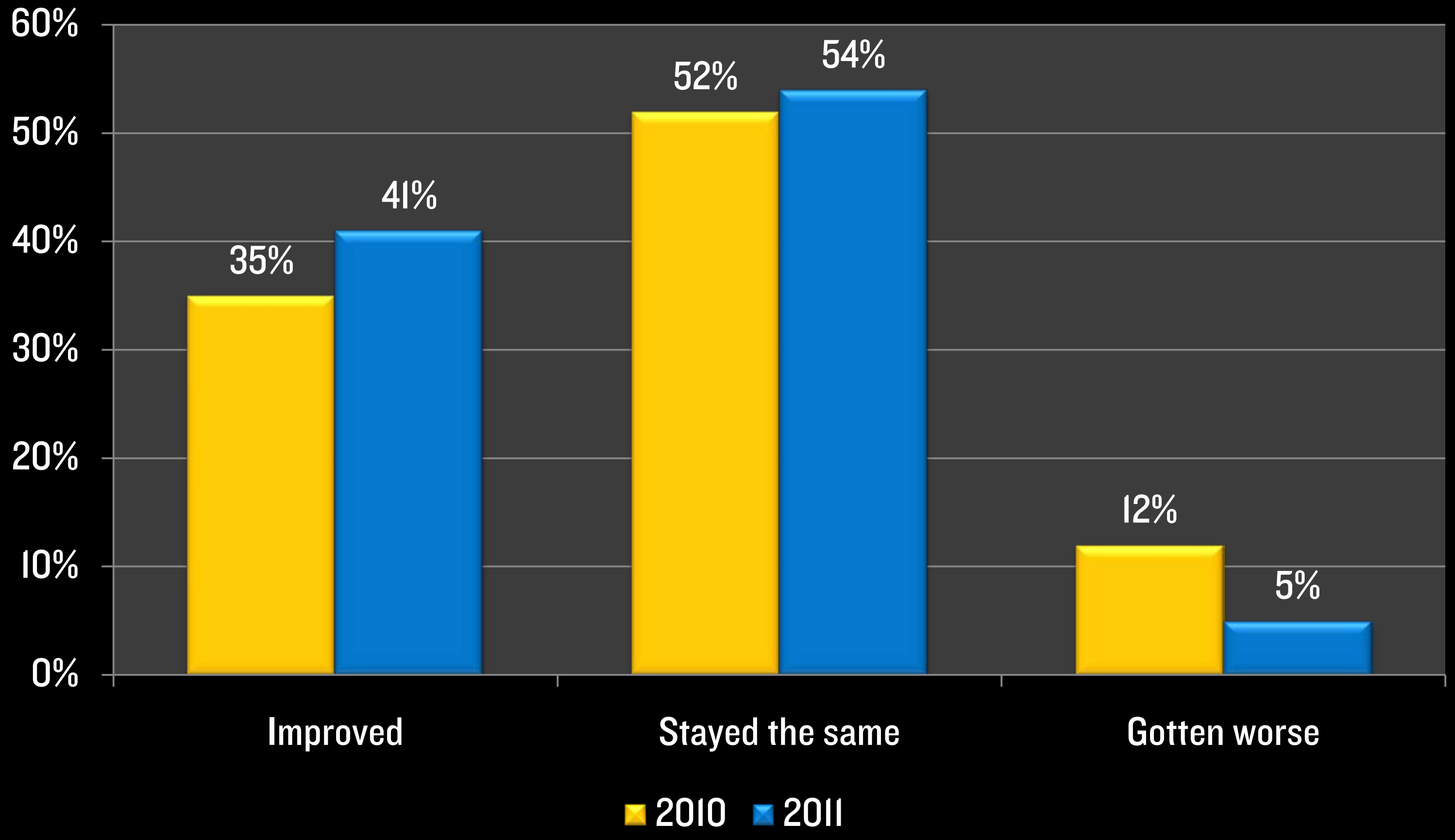
# TRAFFIC, PARKING, & DISTANCE ARE THE BIGGEST DETERRENTS TO DOWNTOWN

Overall, traffic and difficulty of driving downtown has decreased since 2009, while parking concerns have grown significantly. These open-ended responses speak loudly for the perceived confusion on parking and having a more easily identified parking system downtown.



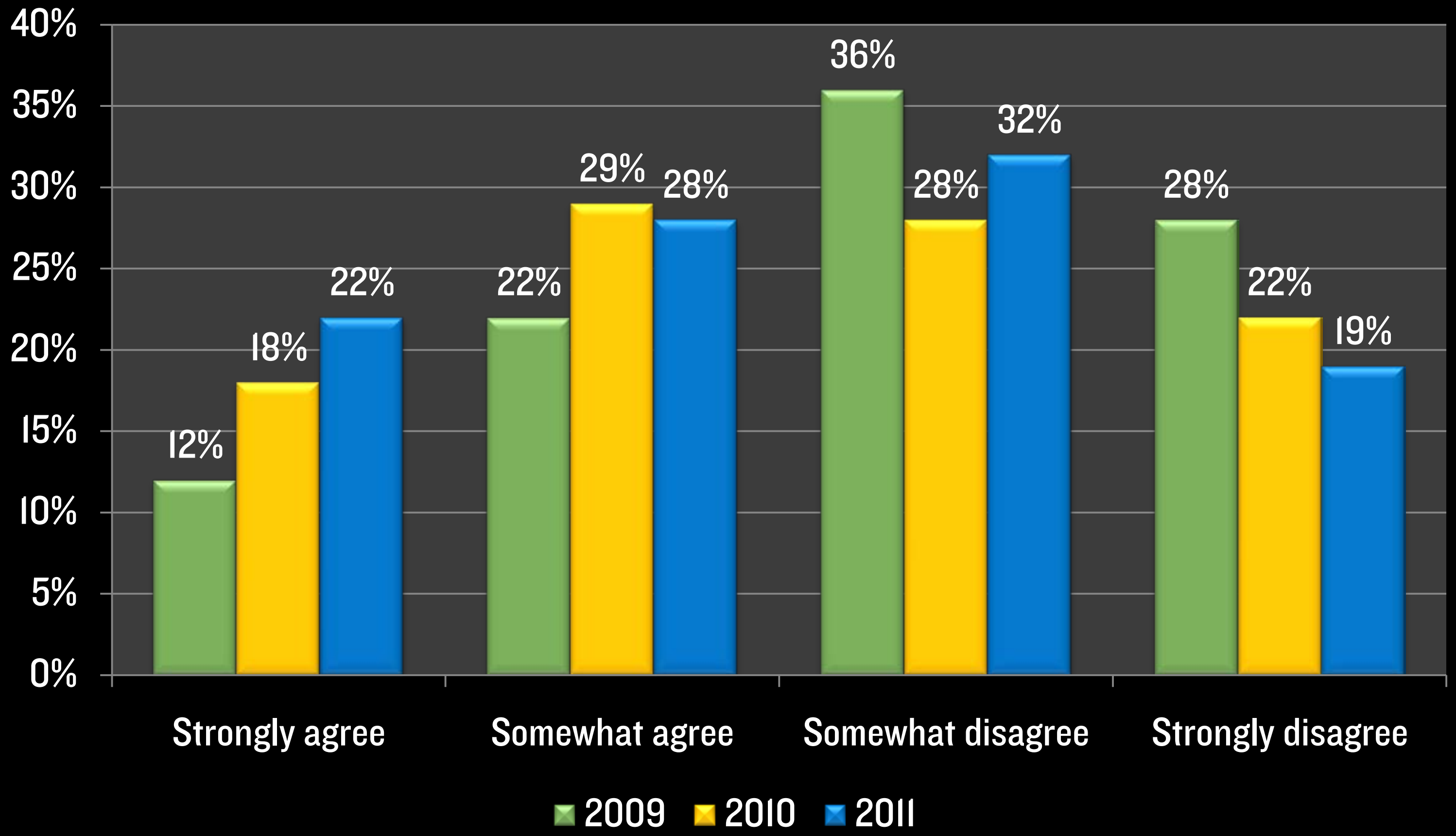
# COMMUNITY PERCEPTIONS OF DOWNTOWN SLC CONTINUE TO IMPROVE

Overall, 41% of respondents indicated their perceptions of downtown Salt Lake had improved over the last 12 months, six percentage points higher than in 2010. Only 5% said their perceptions of downtown had declined compared to 12% in 2010.



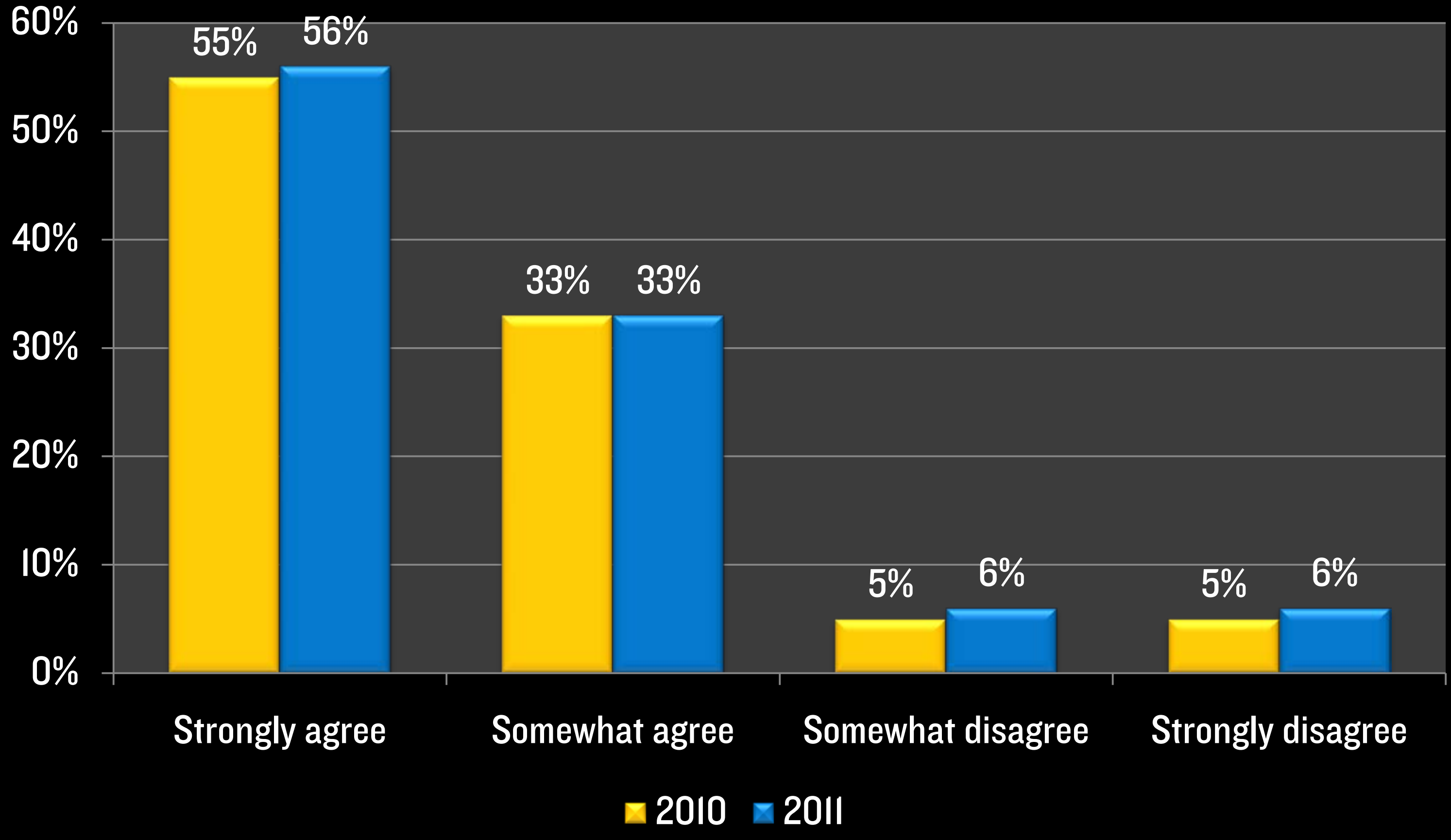
# GREATER SENSE OF CONNECTION WITH DOWNTOWN SLC

When asked whether they felt a sense of ownership and connection with downtown Salt Lake, 50% of 2011 respondents indicated they strongly or somewhat agreed. 22% said they strongly agreed with the statement, 4% higher than in 2010 and 10% higher than in 2009.



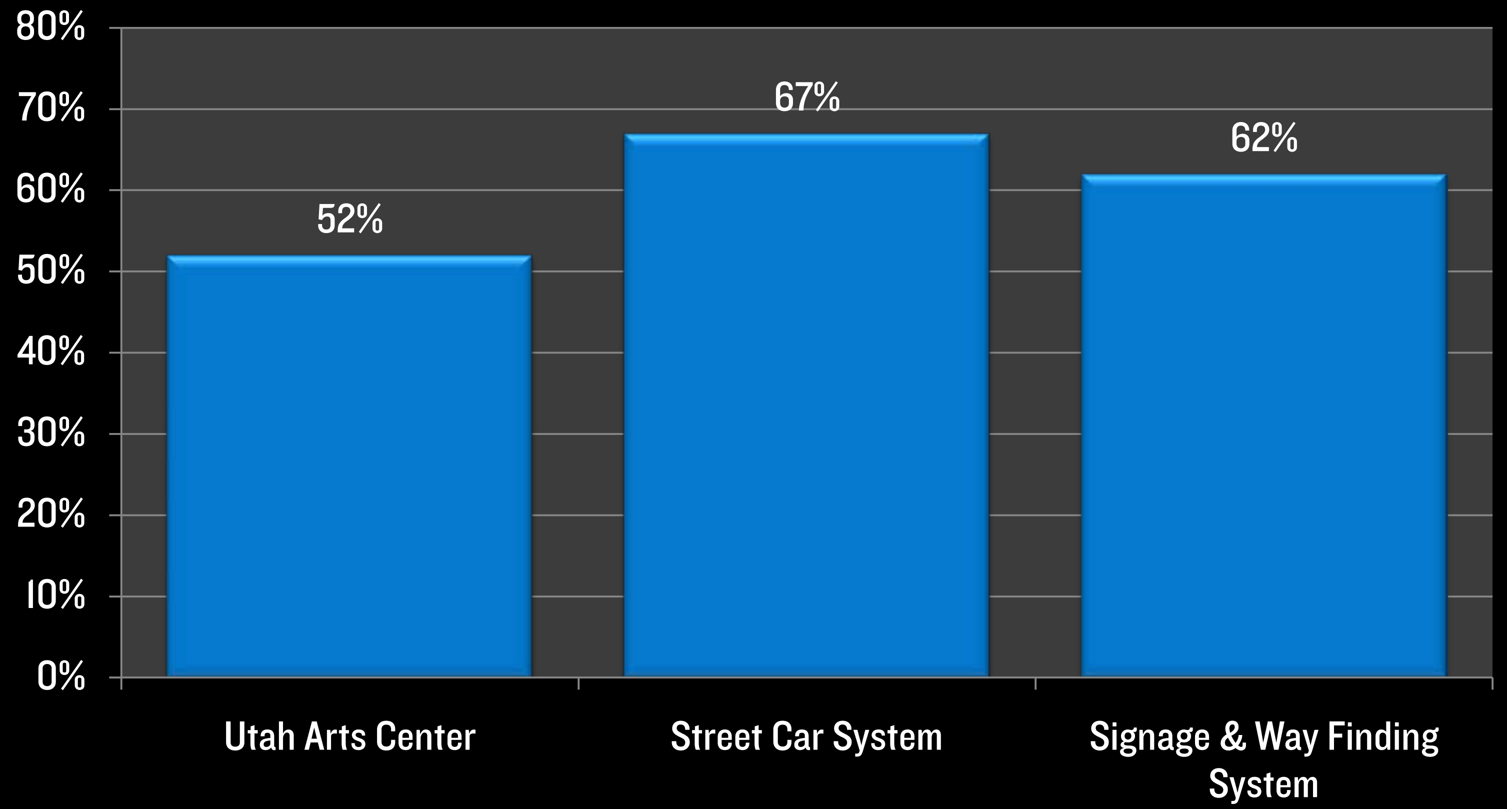
# MAJORITY FEEL POSITIVE ABOUT DOWNTOWN SLC AS PART OF CAPITAL CITY

When asked whether they felt positive about downtown Salt Lake as part of their capital city, 56% of 2011 respondents said they strongly agreed with another 33% saying they somewhat agreed. Responses were flat compared to the prior year.



# PLANNED PROJECTS FOR DOWNTOWN SLC

The chart below shows the combined percentages of those who rated each of the projects as a four or a five (on a five point scale), indicating high levels of perceived personal importance.



STRATEGIC RECOMMENDATIONS

# FOCUS MARKETING EFFORTS ON YOUNGER AUDIENCES.

Utah's younger demographic of 18-44 is more likely to enjoy downtown dining, nightlife, shopping and other downtown events and attractions. Create messaging and a persona that appeals to this demographic and persuades them that coming downtown for entertainment is the thing to do.

STRATEGIC RECOMMENDATIONS

# BUILD ON THE POPULARITY OF UNIQUE DOWNTOWN EVENTS.

Need to continue building greater familiarity for downtown events, such as Dine O' Round and Eve. Having a great experience will generate more positive word of mouth.

STRATEGIC RECOMMENDATIONS

# SHARE THE POSITIVE ASPECTS OF LIVING DOWNTOWN.

New developments will come online in the coming months that will draw large crowds downtown and let them experience the vibrancy of downtown life. Build on that foundation by showcasing all that downtown living has to offer.

# QUESTIONS?

RICHTER7