



Intercept Survey of Chinatown / International District Visitors

April 2012

Draft Presentation

Purpose:

To better understand behaviors and perceptions among visitors to the Chinatown/International District.

Objectives:

- Gauge the general frequency and length of stay of CID's visitors
- Investigate the key reasons for visiting CID
- Understand how visitors travel to CID and parking behaviors of those who drive or carpool to the District
- Gauge how visitation behaviors and parking perceptions have changed since last year
- Identify ways the City can help to sustain and improve visitation to CID
- Quantify the demographic characteristics of visitors to CID

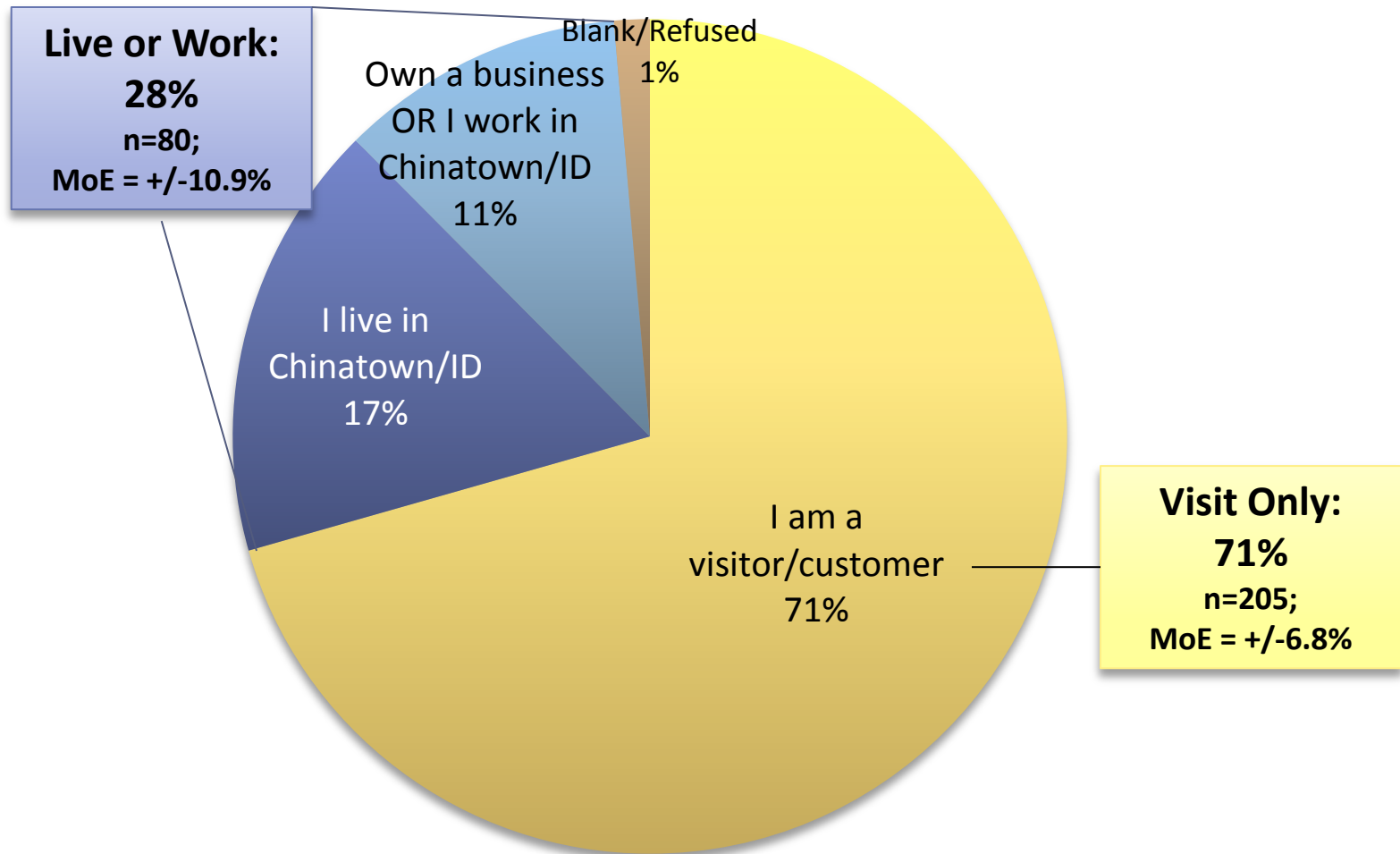
- A total of 290 interviews were completed in CID with an overall margin of error of +/- 5.6 points at the 95% confidence level. There were 24 completed Chinese interviews and 5 Vietnamese.
- Interviewing took place from April 5th-7th and April 21st, with two shifts per day: one in the late morning/early afternoon (10am to 3pm) and one in late afternoon/evening (5 to 10pm).
- The questionnaire was a double-sided, self-administered handout. Two interviewers were on-site for each shift to distribute and collect surveys. Interviewers were also available to assist respondents with visual or physical impairments.
- The survey was printed in three languages: English, Traditional Chinese and Vietnamese. Interviewers were bi-lingual in either English/Chinese or English/Vietnamese to improve participation among non-English speaking respondents.
- To minimize selection bias, during normal and heavy traffic periods interviewers approached every 3rd visitor passing their location to participate. During slow periods, interviewers approached as many visitors as possible.

Due to rounding, some percentages may not add up to exactly 100%.

Profile of Visits

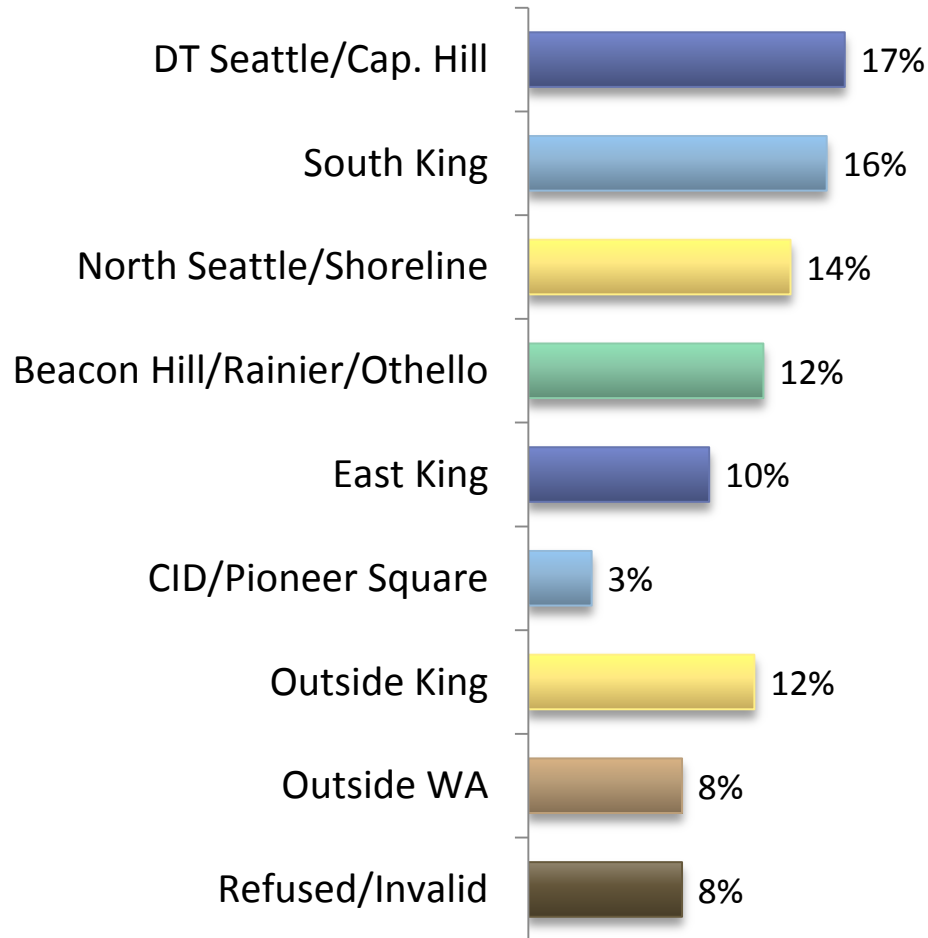


Q2. Which describes you best?



Q16. What is your home zip code?

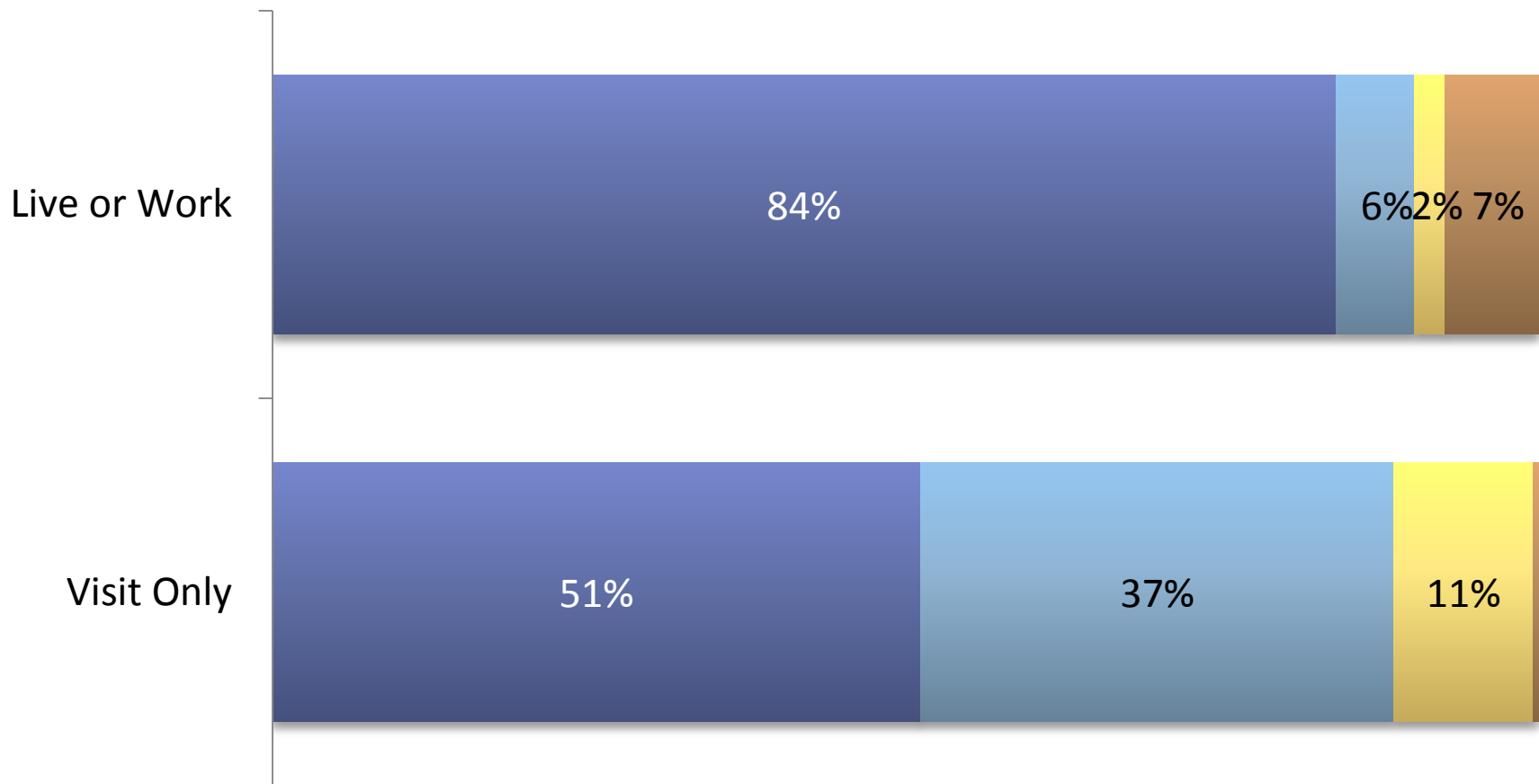
% of Visitors



General Visit Frequency

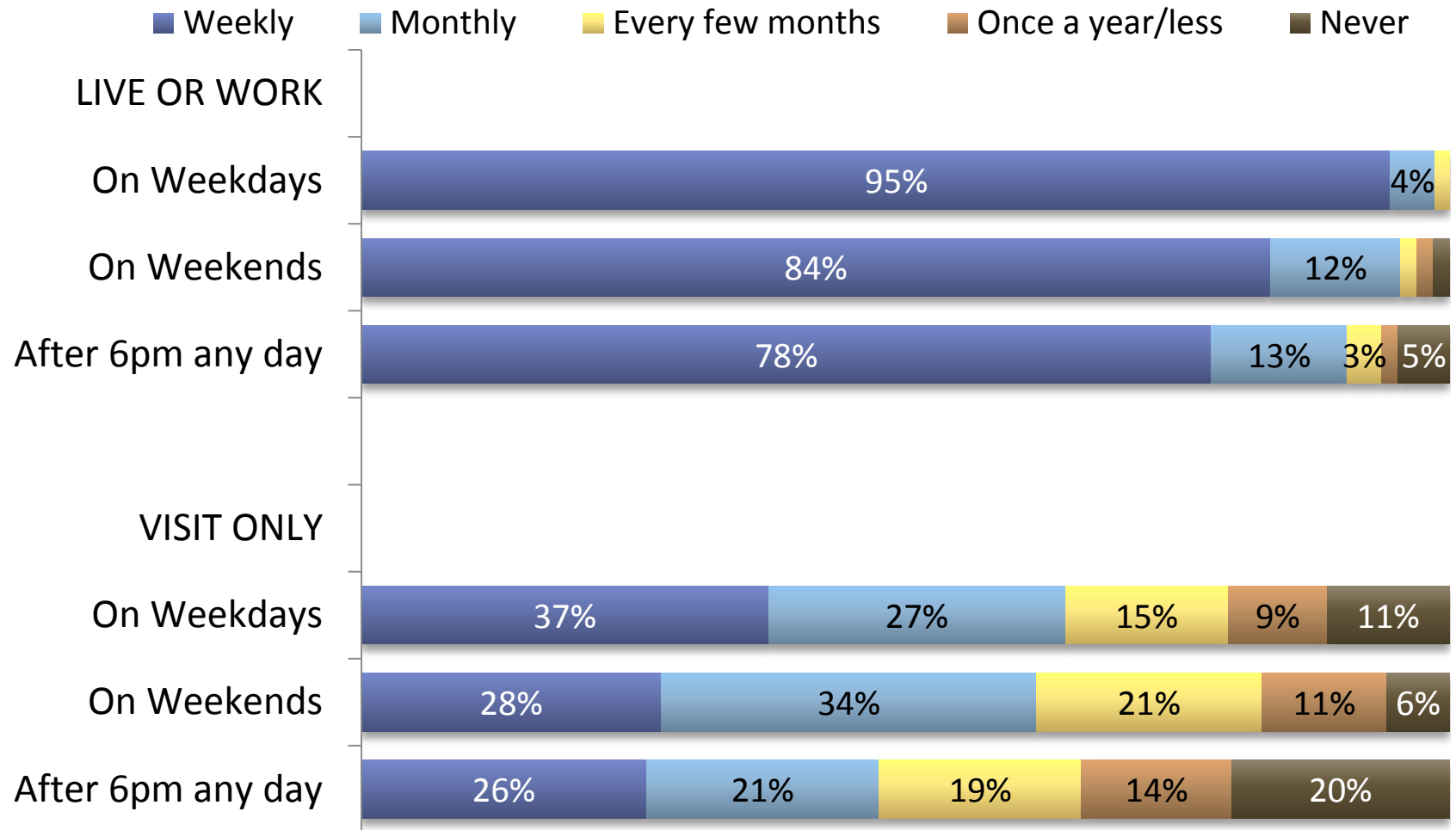
Q1. Which describes how often you visit Chinatown/International District?

■ I come here regularly ■ I've been here a few times ■ This is my first visit ■ DK/ Refused



Visitation Frequency

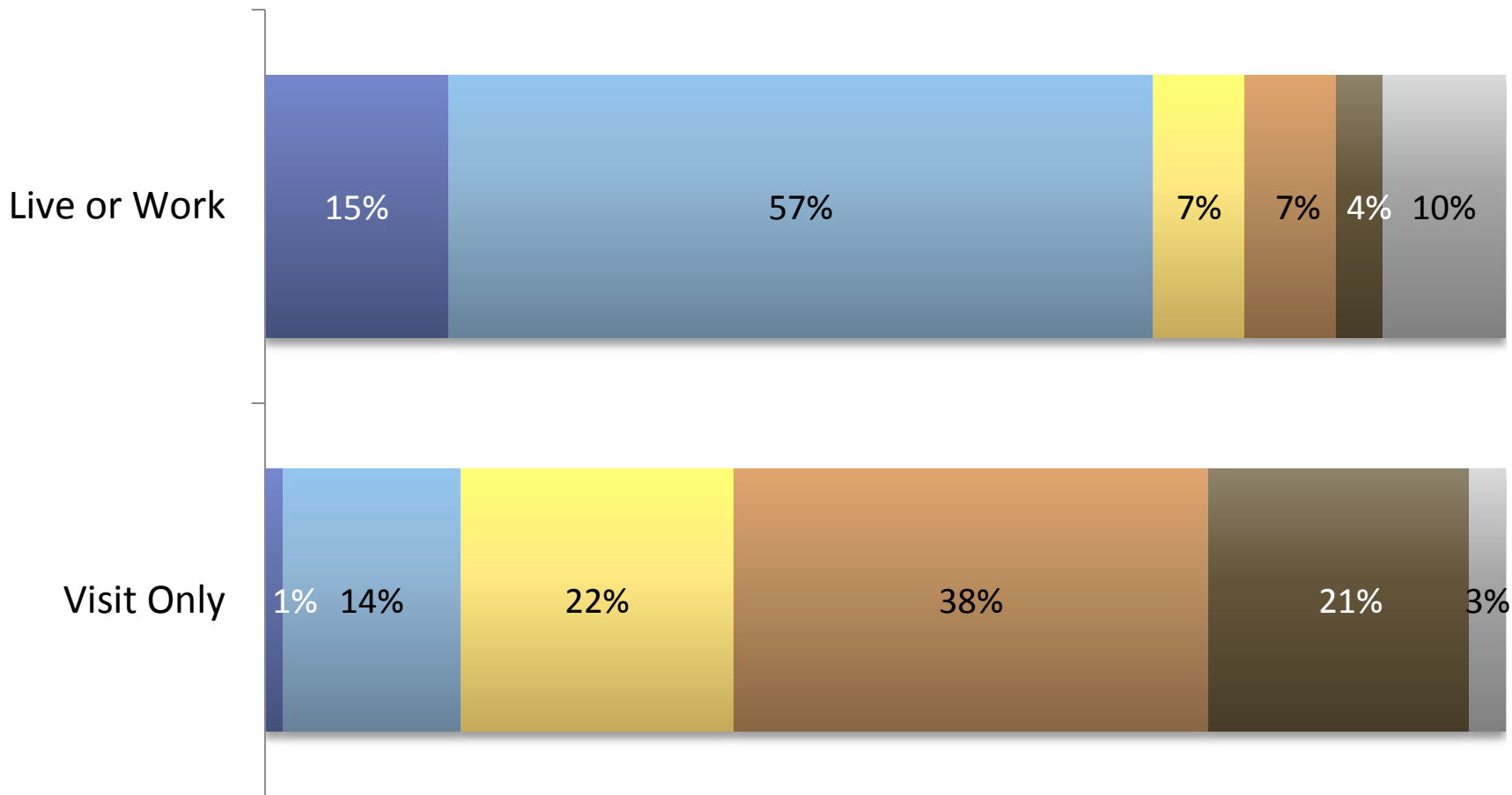
Q5. How often do you visit Chinatown/ID...



Length of Visit

Q3. How long will your visit to Chinatown/ID be today? (CHECK ONE)

■ 4 hrs or longer ■ 3-4 hrs ■ 1-2 hrs ■ Less than 1 hr ■ Parking; Not staying ■ Not sure



1) Gauge the general frequency and length of stay of CID's visitors

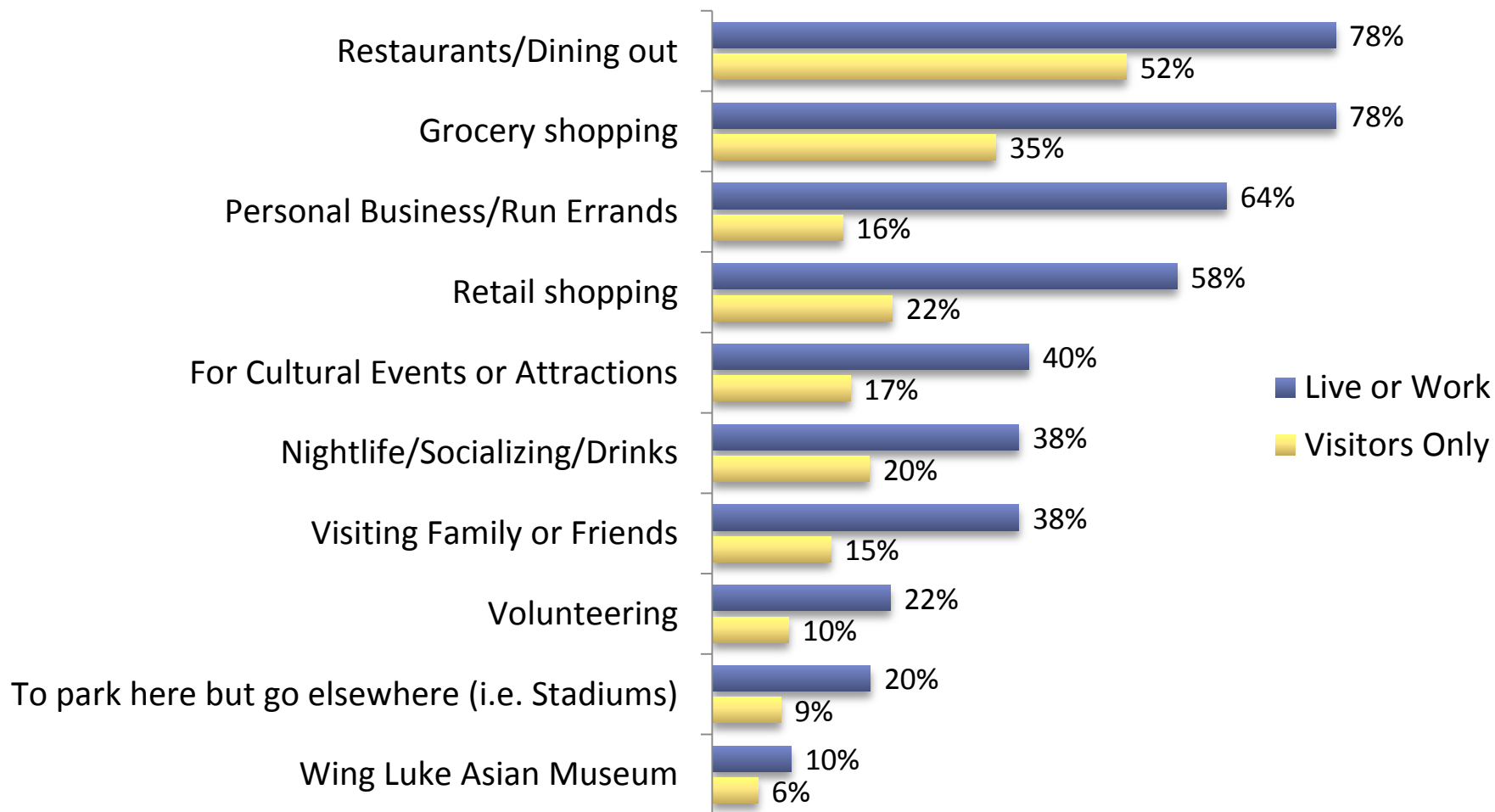
- Nearly three-quarters (71%) of respondents are visiting the CID. Just over a quarter of respondents (28%) either live or work in CID.
- Even if all 28% of Live/Work respondents were CID residents, the percentage of visitors observed in the CID is still higher than any other Seattle neighborhood we did similar surveys in (40-70% of other NBD visitors were non-residents). In other words, the CID relies more on visitors for its activity than other neighborhoods.
- Those who live or work in CID are very likely to be regular visitors, visiting consistently throughout the week and staying for extended periods of time (57% for 3-4 hours).
- By contrast, Visit Only respondents are less frequent visitors and their visits are shorter. They visit less often in the evening (26% visit after 6pm on a weekly basis) and have relatively brief trips to CID (59% stay for less than an hour).

Purpose of Visits



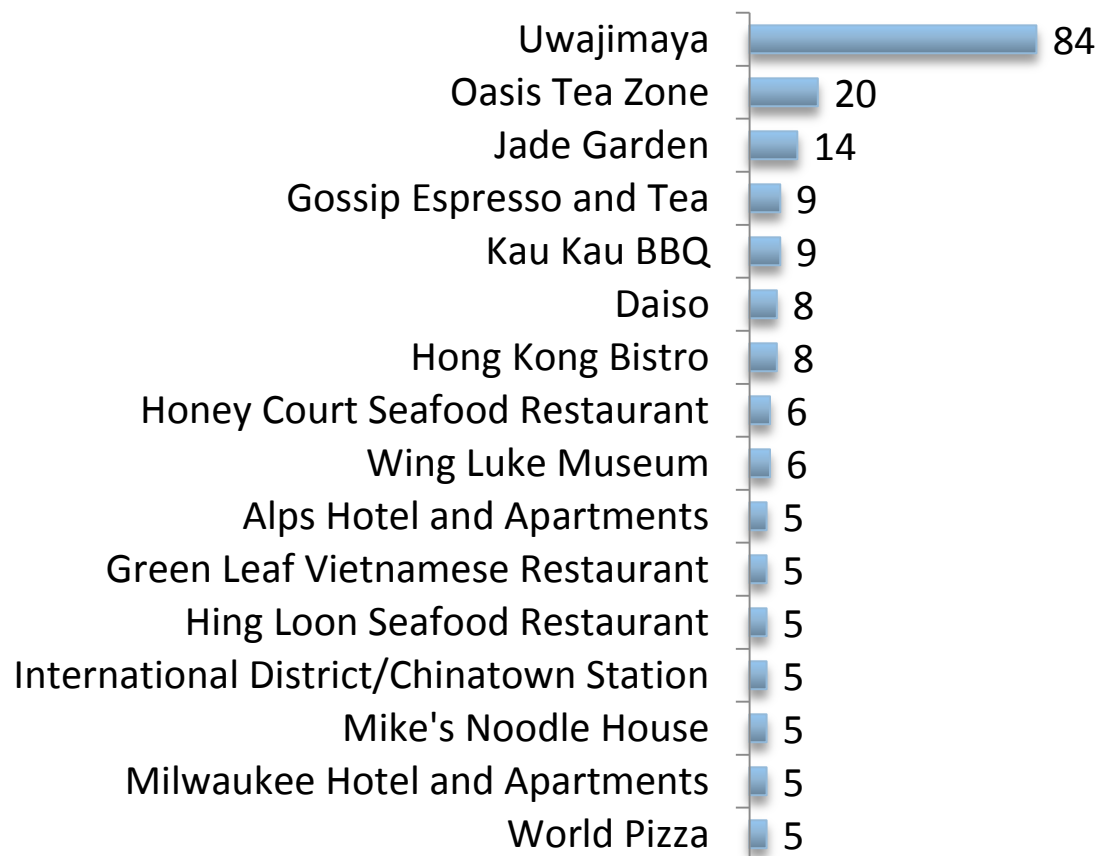
Q5. How often do you visit Chinatown/ID... (% of respondents doing each at least **monthly**)

% Doing Each Monthly in CID



Q4. Write the names of the specific businesses or places you are visiting/visited in Chinatown/ID **today**.
(Multiple responses; Number of responses shown)

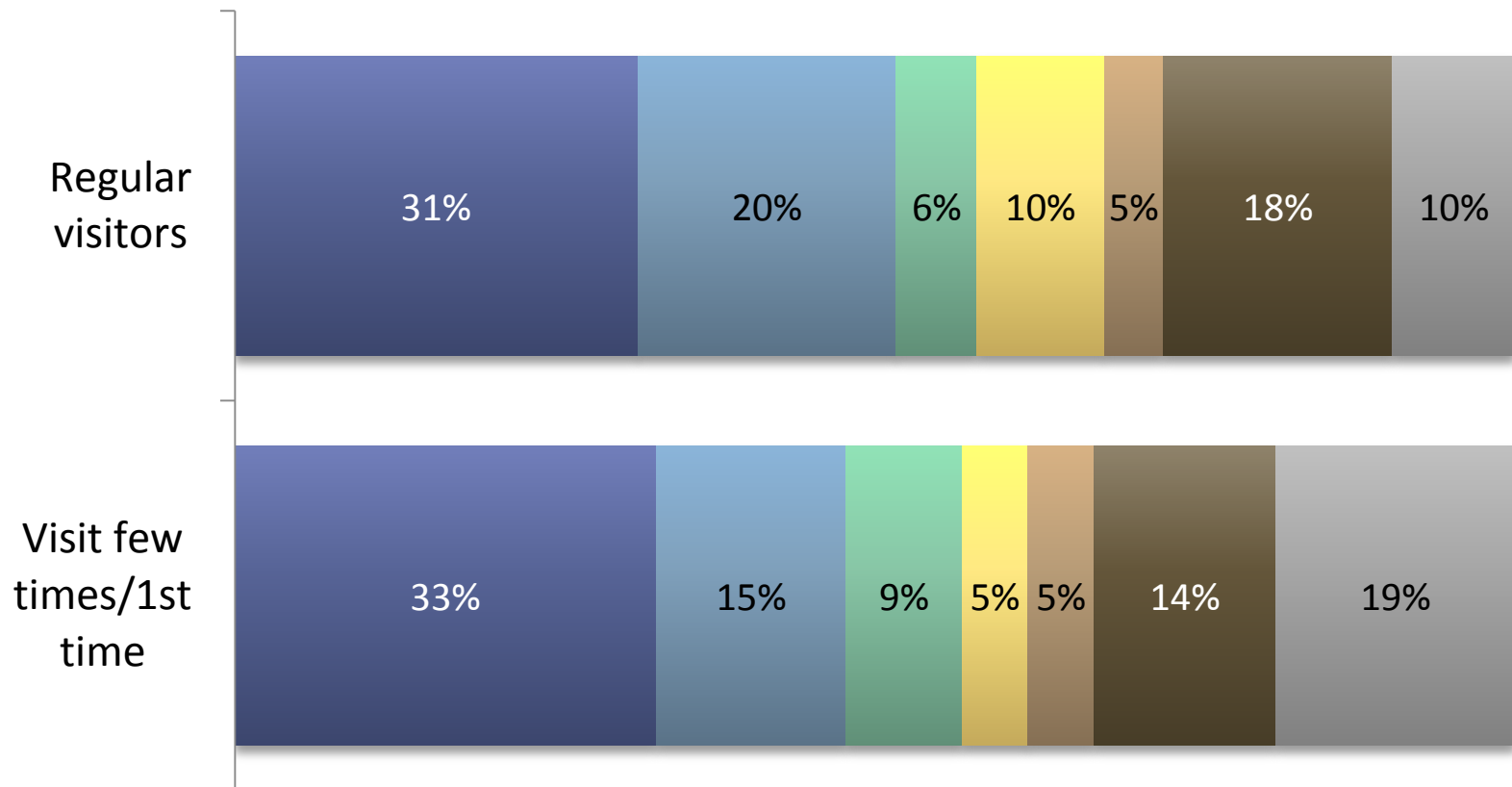
Top mentions among all respondents (n)



Destination Categories

Q4. Write the names of the specific businesses or places you are visiting/visited in Chinatown/ID **today**.
(Multiple responses; Percentages based on all responses combined)

- Restaurants
- Uwajimaya
- Coffee/Bubble Tea
- Retail Stores
- Hotel or Apartment
- Other
- Don't Know/NA



2) Investigate the key reasons for visiting CID

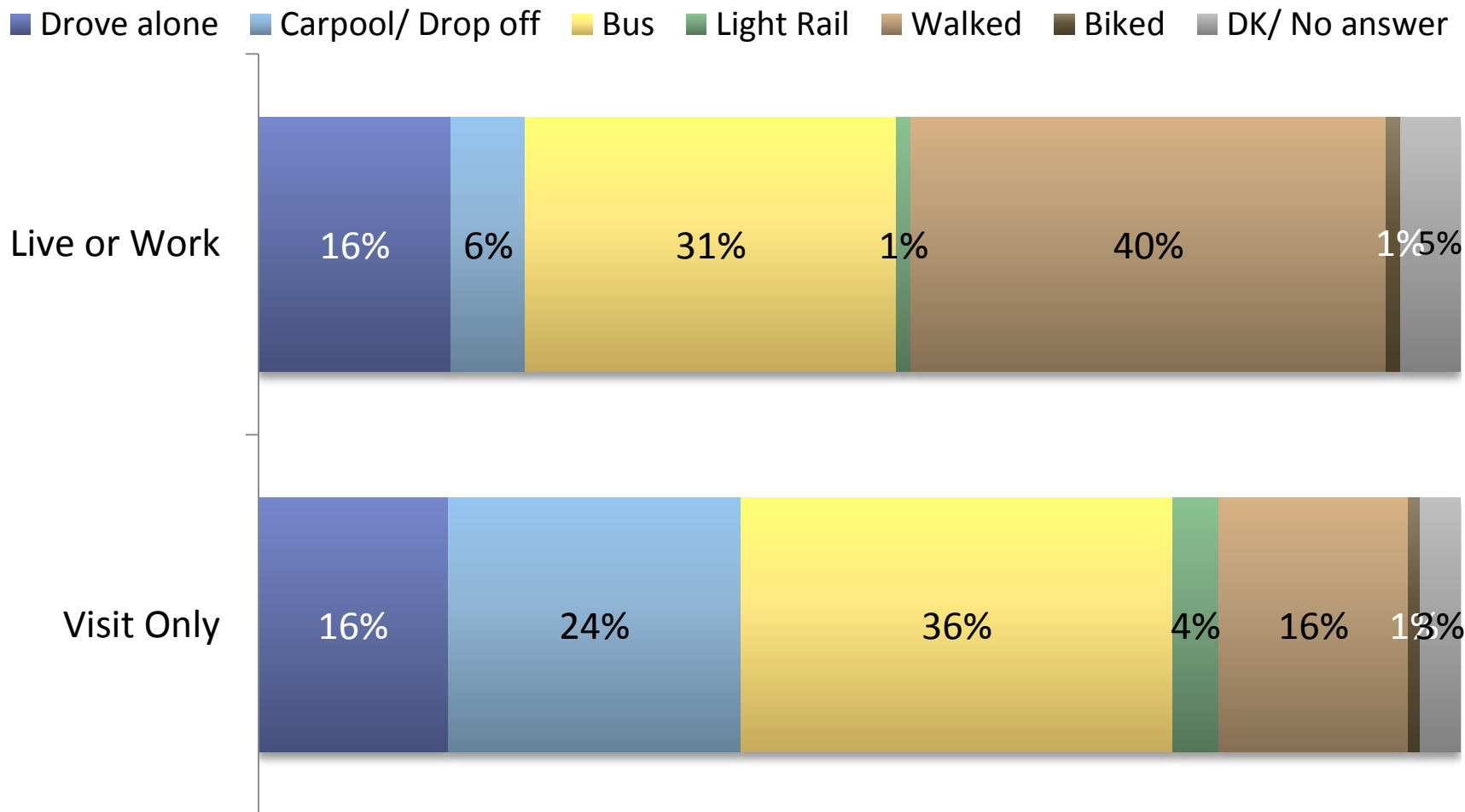
- Restaurants/Dining out and Grocery shopping are the biggest drivers for both Live/Work respondents and visitors coming to the District.
- Retail shopping (22%+ monthly), Nightlife (20%+) and Cultural Events (17%+) are also in the top six most common CID attractions for both groups. However, those with a Live/Work connection are also likely to run errands in CID (64% monthly).
- When asked for their specific destinations, over a quarter of all respondents (84 mentions) went to Uwajimaya during their visit to CID. Oasis (20 mentions) and Jade Garden (14) were the next-most frequently mentioned stops among all visitors.
- Comparing self-identified regular visitors and those who come less often, both are visiting the ID for similar purposes. Food-related activities (restaurants, Uwajimaya and bubble tea/coffee) are mentioned by a majority (57%+) of both groups visiting CID.

Travel & Parking Profile



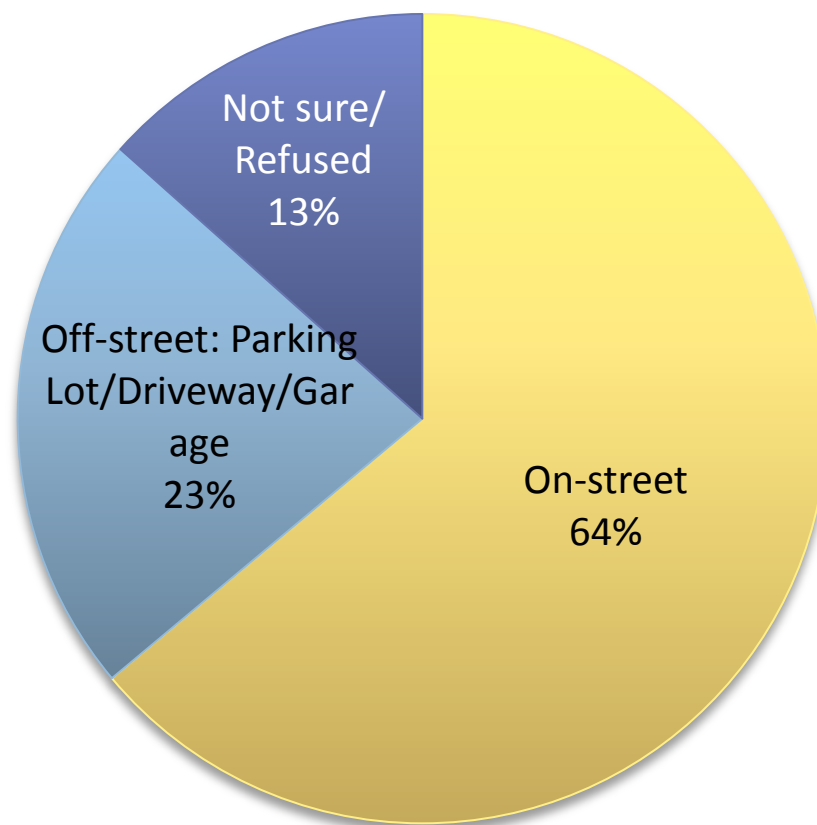
Mode of Travel

Q10. How did you travel to the Chinatown/ID today? (Single response)



Q11. Did you park on street or off street?
(n=98; MoE=+/-9.9%)

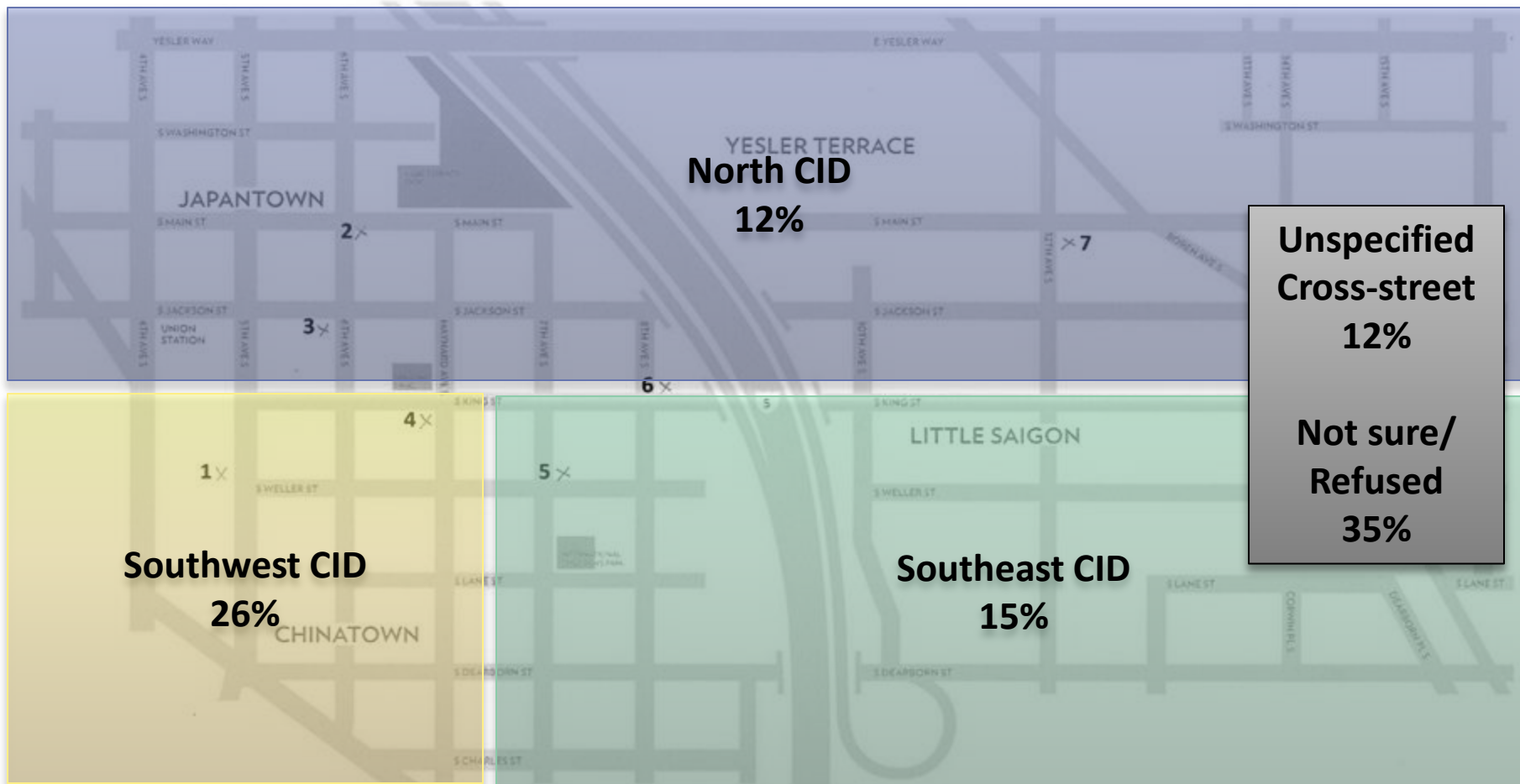
Drove or Carpoled Only (%)



Parking: Location Breakdown

Q12. Where did you park? Write the nearest cross-streets, landmark, or business.
(n=98; MoE=+/-9.9%)

Drove or Carpooled Only (%)



3) Understand how visitors travel to CID and parking behaviors of those who drive or carpool to the district

- Visitors travel to CID via a steady mix of modes: two-fifths (40%) drove or carpooled while an equal portion (40%) took transit.
- Live/Work respondents are more likely to walk (40%) to CID but also travel by a mix of transit (32%) and driving/carpooling (22%).
- About four times as many visitors carpooled or got dropped off (24%) as Live/Work respondents (5%).
- Of those who drove or carpooled to CID, nearly two-thirds (64%) parked on-street.
- Many respondents were unable to recall their parking location specifically enough (12%), or at all (35%). A plurality (26%) of those who could answer the question parked south of King St. and west of 7th Ave.

Paid Parking Impacts

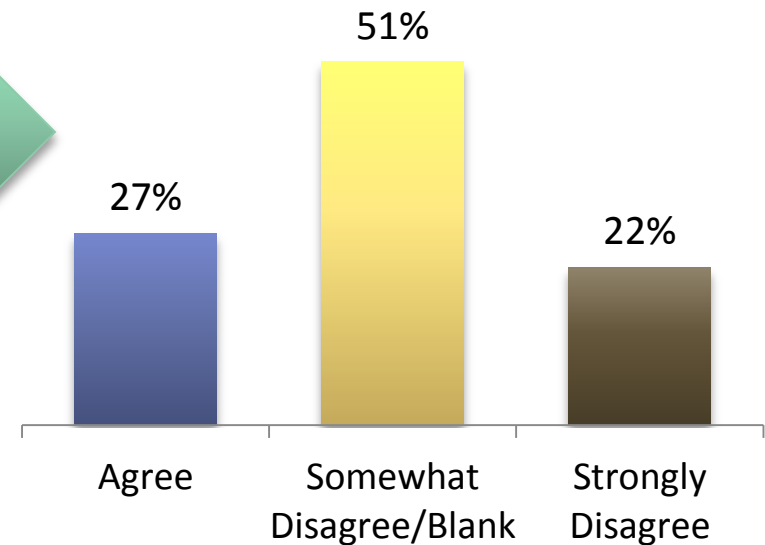
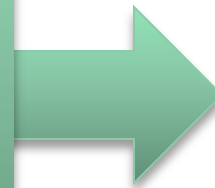


Q13. In the summer of 2011, on-street paid parking hours were extended until 8:00pm in various parts of Seattle, including Chinatown/ID. Indicate how much you agree or disagree with the following statement:
“Since the parking change went into effect, I am visiting Chinatown/ID more often.”

Regular Visitors (%)

“Regular Visitors”
Excludes Live/Work respondents
AND
Excludes first-time visitors and those
visited the CID only a few times

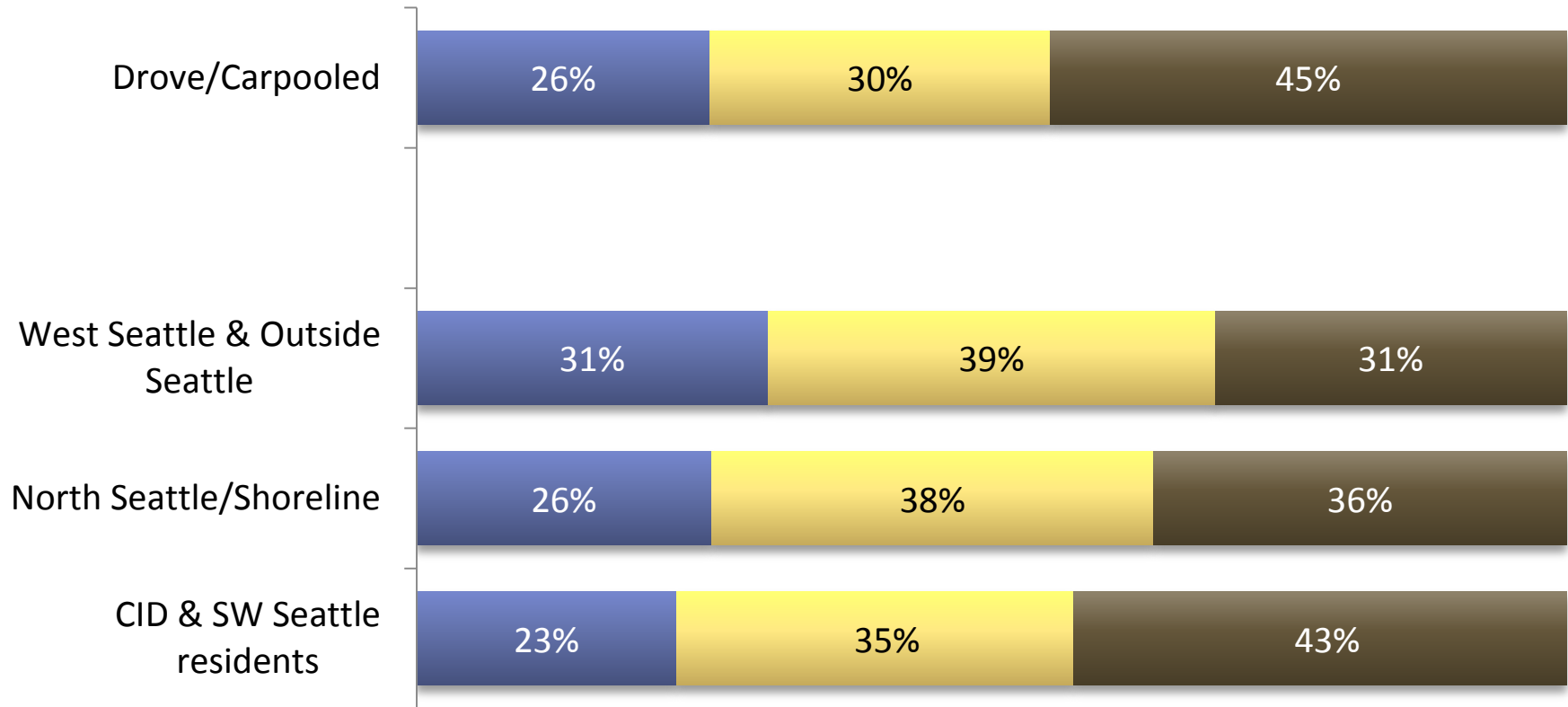
[n=104; MoE = $\pm 9.6\%$]



Impact on Visit Frequency

Q13. In the summer of 2011, on-street paid parking hours were extended until 8:00pm in various parts of Seattle, including Chinatown/ID. Indicate how much you agree or disagree with the following statement:
“Since the parking change went into effect, I am visiting Chinatown/ID more often.”

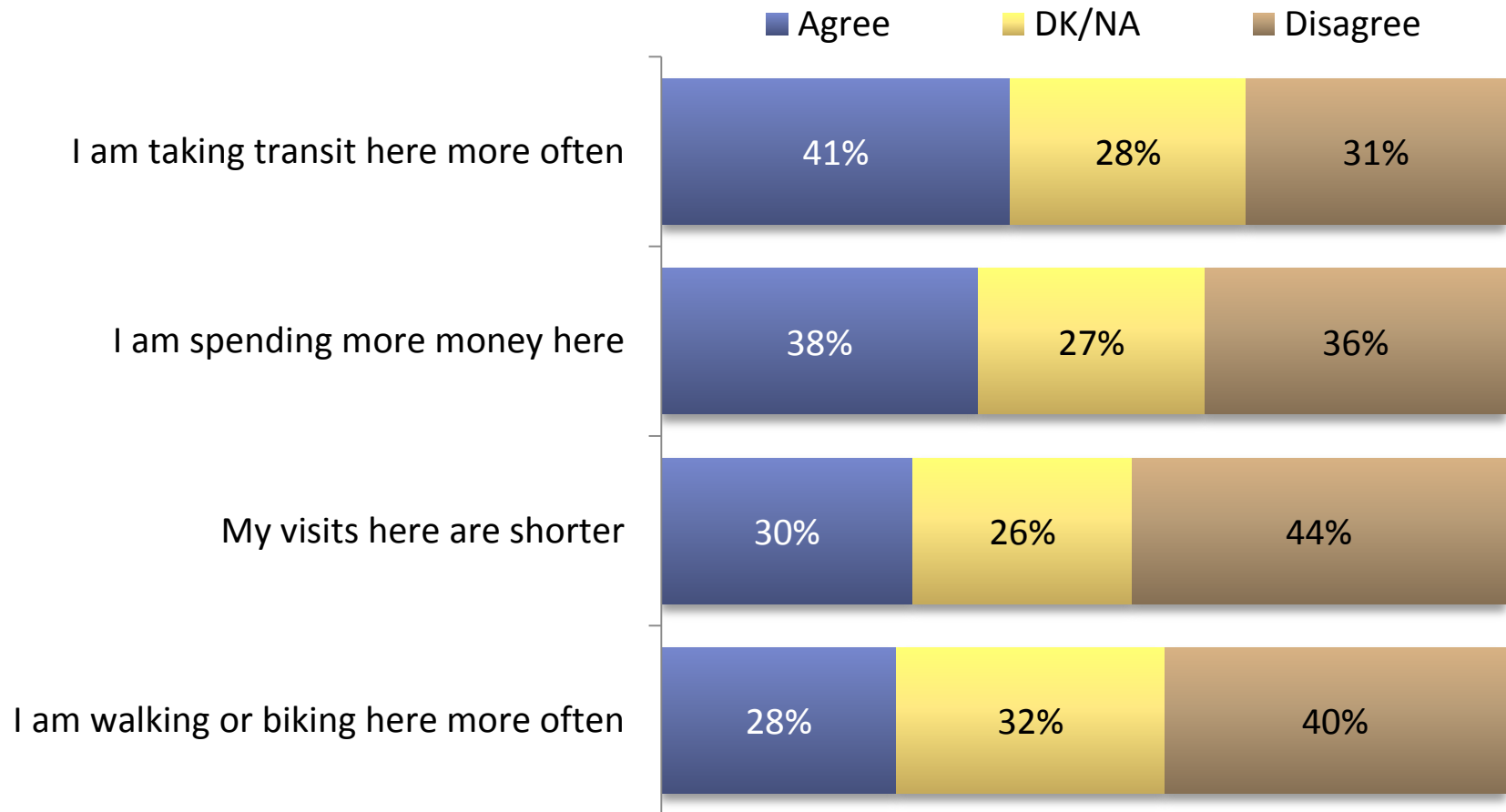
■ Agree ■ Somewhat Disagree/Blank ■ Strongly Disagree



Impacts on Visitation Behaviors

Q14A-D. Indicate how much you agree or disagree with each of the following statements.
Since this time a year ago:

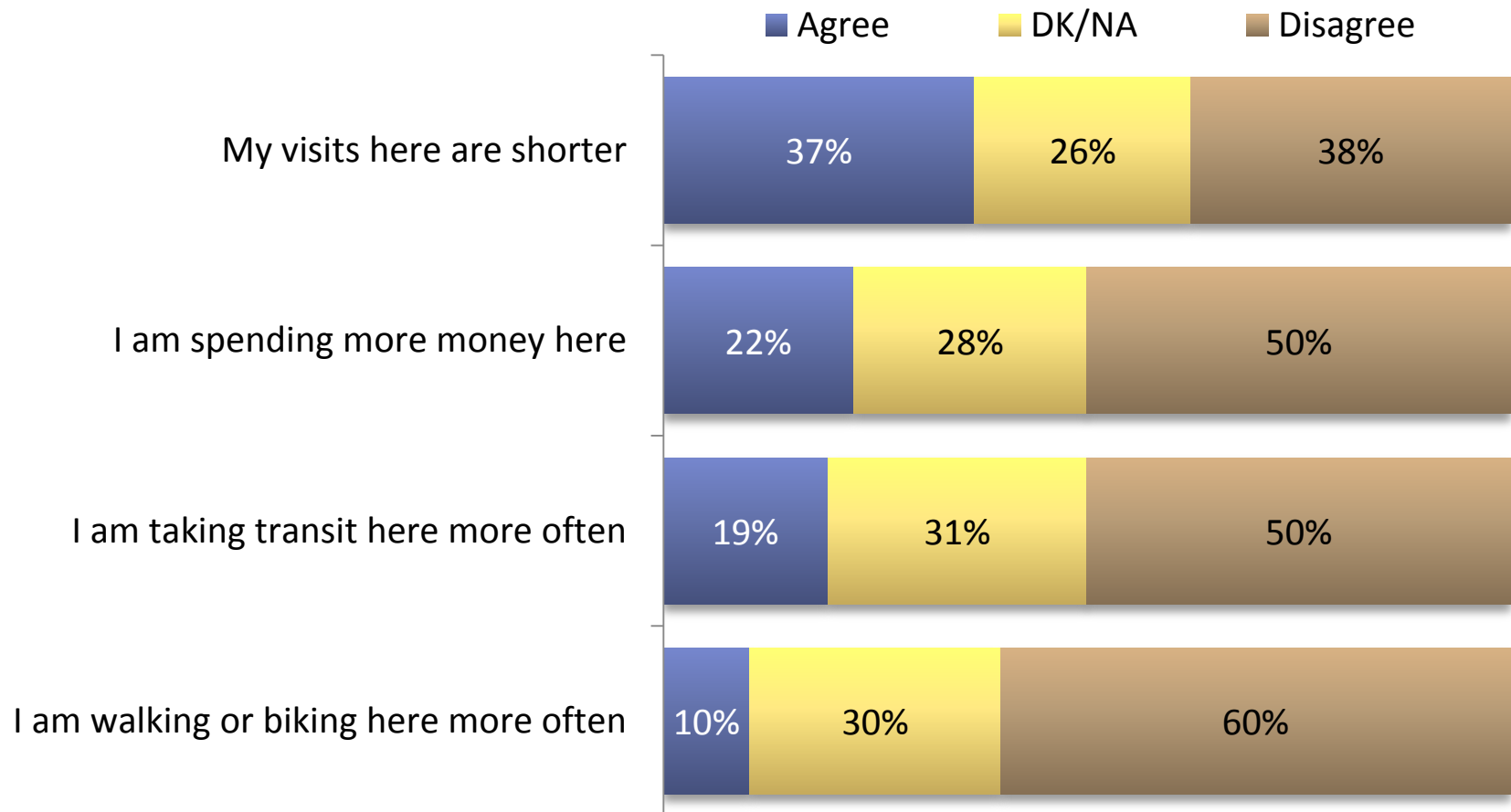
Regular Visitors (%)



Impacts on Visitation Behaviors

Q14A-D. Indicate how much you agree or disagree with each of the following statements:
Since a year ago this time:

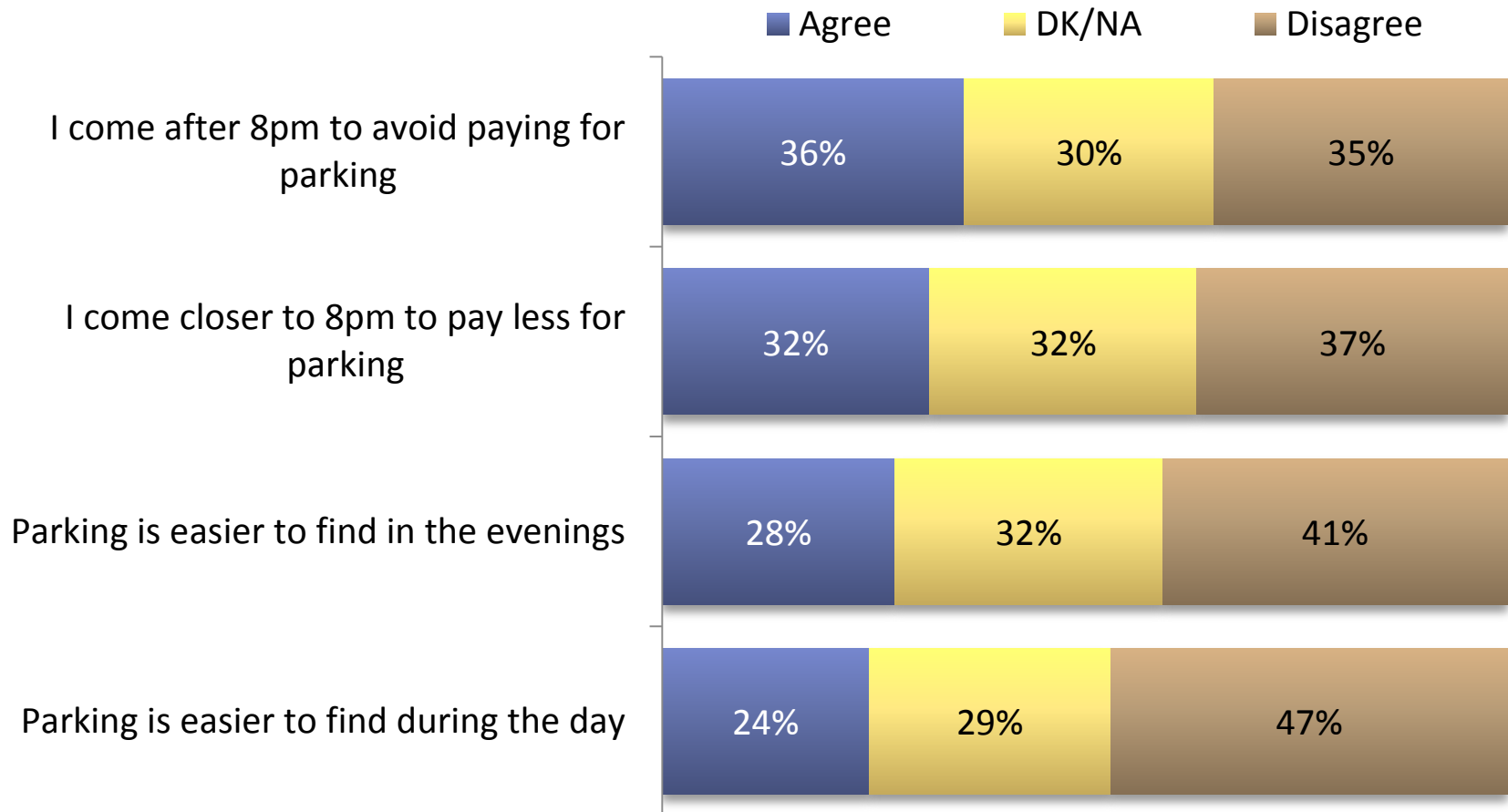
Drove or Carpooled (%)



Impacts on Visitation Behaviors

Q14E-H. Indicate how much you agree or disagree with each of the following statements:
Since a year ago this time:

Drove or Carpooled (%)



5) Gauge how visitation behaviors and parking perceptions have changed since last year

- Just over a quarter (27%) of regular visitors agree that they visit more often now than before the extended paid parking hours went into effect, but just as many disagree. The majority (51%) don't appear to have changed their visitation.
- Between now and one year ago, regular visitors are taking transit more often. At the same time among regular visitors:
 - Spending has stayed about the same (equal number agree/disagree)
 - More visits have stayed the same or are longer
- Among drivers, the length of visits is a wash, while only a small portion say they are spending more money or taking transit more often to CID.
- Among drivers, just as many agree as disagree that they now come after 8 to avoid parking or come closer to 8pm to pay less.
 - At the same time, drivers are more likely to disagree that parking is easier to find.

Improving Visitation



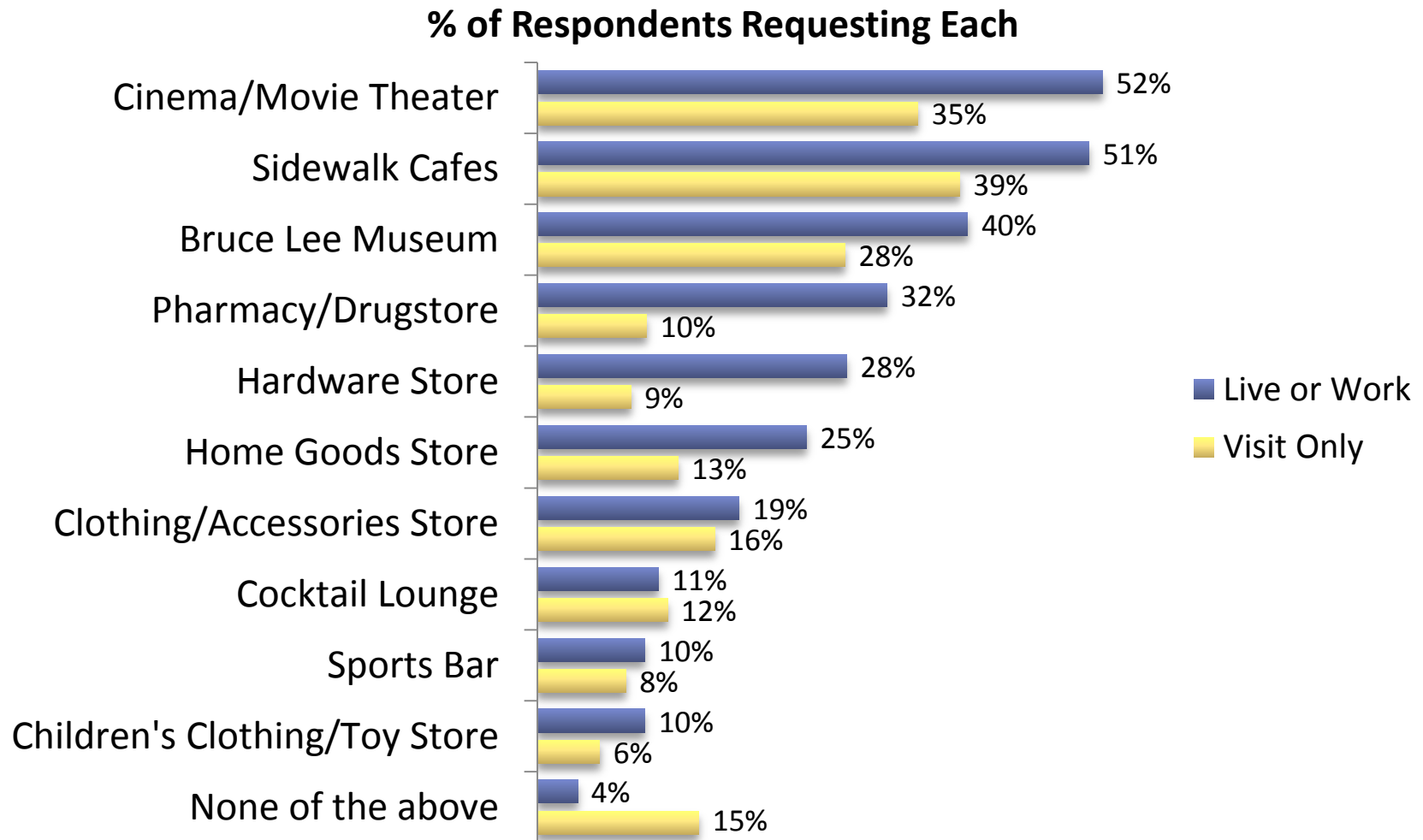
Top-of-Mind CID Descriptions

Q7. What sorts of words or phrases that describe your shopping and dining experiences in Chinatown/ID?
(First mention percentages shown)

	% of All
Positive mentions	51%
Good/delicious food	11%
Fun/Enjoyable	5%
Diverse/Cultural/Sense of community	4%
Beautiful/Interesting/Unique	4%
Cheap/Affordable	3%
Convenient	2%
Other Positive	6%
Non-specific Positive (i.e. good, great, etc.)	17%
Negative mentions	4%
Parking - bad, expensive, not enough	3%
Other negative	1%
Neutral mentions	44%
Okay/Fine	2%
Other	7%
Don't Know/NA	36%

Prompted Improvement Suggestions

Q9. Of the following items, which would you most like to see added to Chinatown/International District?
(Multiple response; Percentage of respondents mentioning each shown)

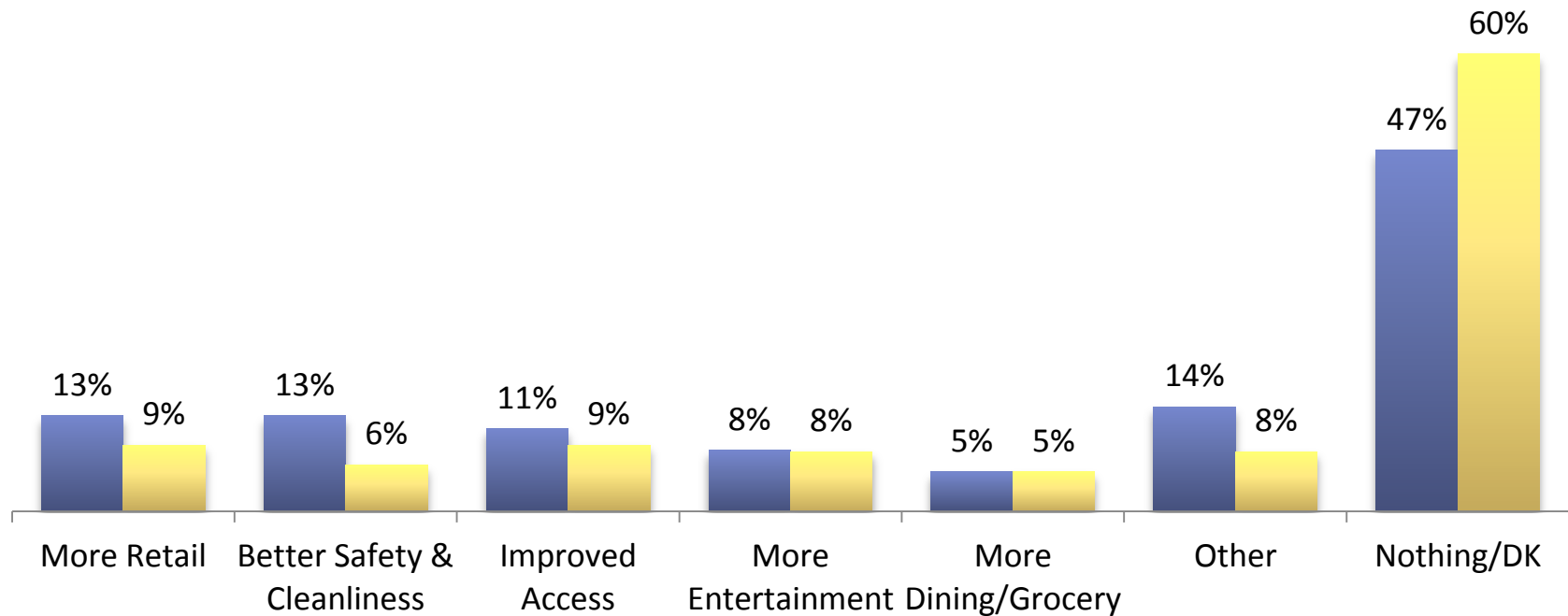


Top-of-Mind Improvement Suggestions

Q8. What would you like to see here in the Chinatown/International District that isn't currently a part of, or available, in the neighborhood? (Multiple response; Number of respondents mentioning each shown)

% of Respondents Requesting Each

■ Live or Work ■ Visit Only



Q8. What would you like to see here in the Chinatown/International District that isn't currently a part of, or available, in the neighborhood? (Multiple response; Number of respondents mentioning each shown)

Top specific mentions (n)



5) Identify ways the City can help sustain and improve visitation to CID

- Visitors' top-of-mind descriptions of CID's shopping and dining experiences were mostly (51%) positive, citing quality food (11% mention) as the top reason. Another large portion of respondents (44%) were unsure how to describe it while very few (4%) said anything negative about their shopping and dining experiences in CID.
- When offered a list of possible CID additions, sidewalk cafes (39%+ mentioned), a cinema/theaters(35%+) and a Bruce Lee museum (28%+) were the top three requests among both Visit Only and Live/Work respondent groups.
- A majority (51%+) of those living or working in CID expressed interest in sidewalk cafes and a movie theater while a significant portion would also like to see more pharmacies (32%), hardware stores (28%) and home goods stores (25%).
- A majority (60%) of visitors and a plurality (47%) of Live/Work respondents do not have top-of-mind suggestions for improving CID's offerings. The top specific mentions include more retail (21 mentions), improved safety (15), cleanliness (14) and parking price (12) and availability concerns (15).