



Downtown Scottsdale Brand Perceptions Presentation

June 7, 2017

Background

Research Objective: To provide the City of Scottsdale, and HAPI, with deeper insights into perceptions of Downtown Scottsdale in order to facilitate the development of a new brand awareness campaign to drive additional visitors to Downtown Scottsdale.

Our primary focus is to understand the perceptions of those who live outside of Scottsdale in order to better market to them.

Two Phased Approach:

- Focus Groups – gain insights around current perceptions of Downtown Scottsdale, a deeper understanding of what resonates with the target audiences, and how their perceptions impact their desire to experience Downtown Scottsdale.
- Online Survey - the insights gleaned from the focus groups were used to inform the development of an online survey, designed to get feedback from a larger and more representative audience.

Project Overview

In-person focus groups were conducted in Phoenix on April 26th and April 27th, 2017.

An online survey was fielded between May 13th and May 26th, 2017.

Two groups with each audience.

AUDIENCES	# of Respondents
Residents of Scottsdale	16
Residents living in the Phoenix Metro area (Phoenix, Mesa, Tempe, Gilbert, Peoria, Glendale, Chandler)	15
TOTAL RESPONDENTS	31

AUDIENCES	Completed Surveys
 Phoenix Metro Residents	382
 Scottsdale Residents	130
 Tucson Metro Residents	200
TOTAL RESPONDENTS	712

SCREENING CRITERIA

The following criteria were used to qualify participants:

- Residents of the specified metropolitan areas
- Household income of \$65,000 and above (singles \$50,000+)
- Sometimes or frequently engage in at least 3 of the following activities:
 - *Attend festivals or events*
 - *Shop at boutiques or shopping malls*
 - *Go to a casual/fine dining restaurant*
 - *Go to art galleries*
 - *Experience nightlife*
- Willing to spend 30+ minutes driving to do an activity in the Phoenix area
- Open to doing leisure activities in Downtown Scottsdale
- Between the ages of 25 and 65

Unaided: First Thing That Comes To Mind

Respondents were asked to write down the first things that came to mind when they think of Downtown Scottsdale.

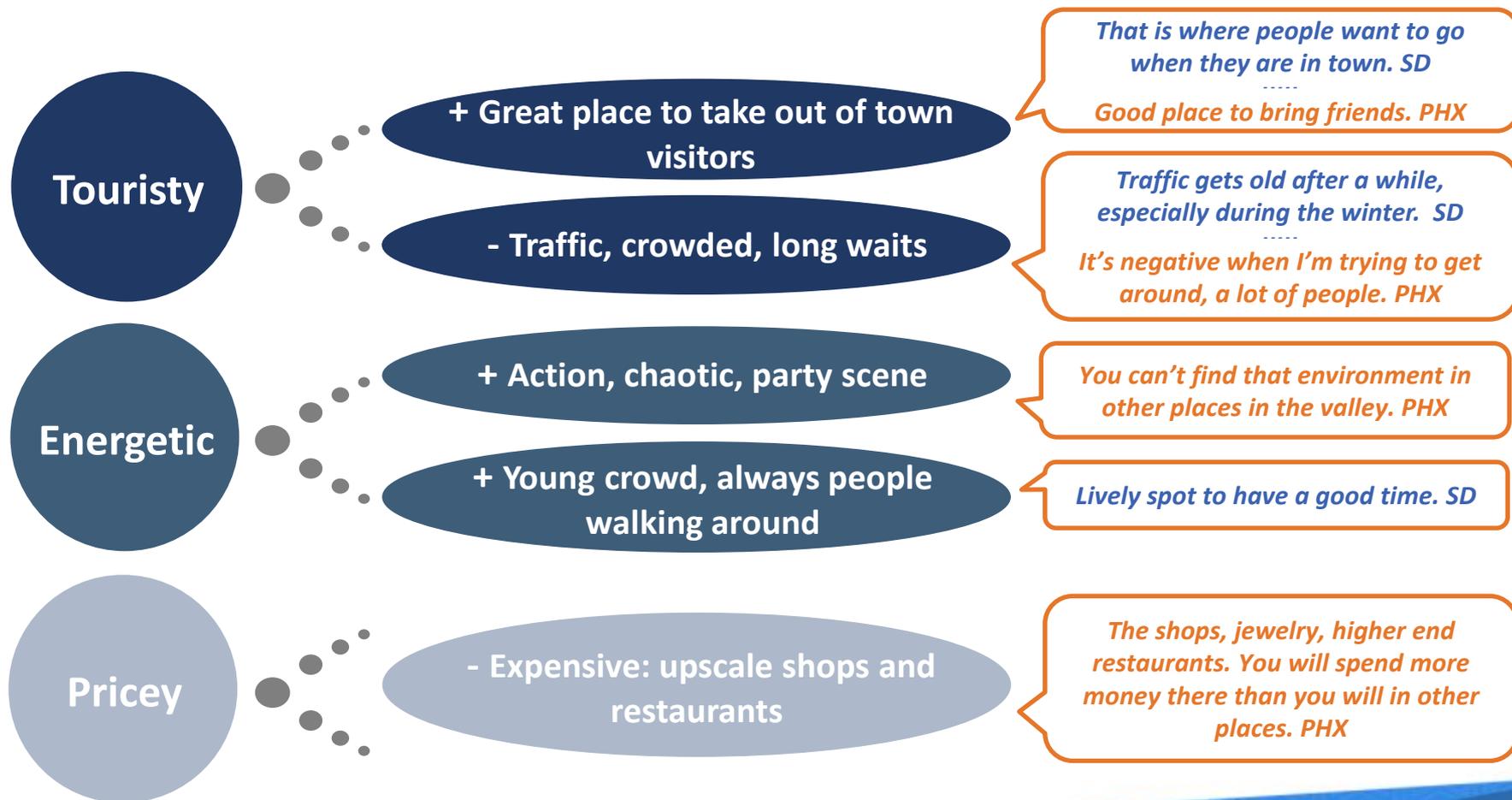
- The most common top of mind perceptions overall had to do with shopping, restaurants and nightlife.



The size of the circle indicates the frequency of mention.

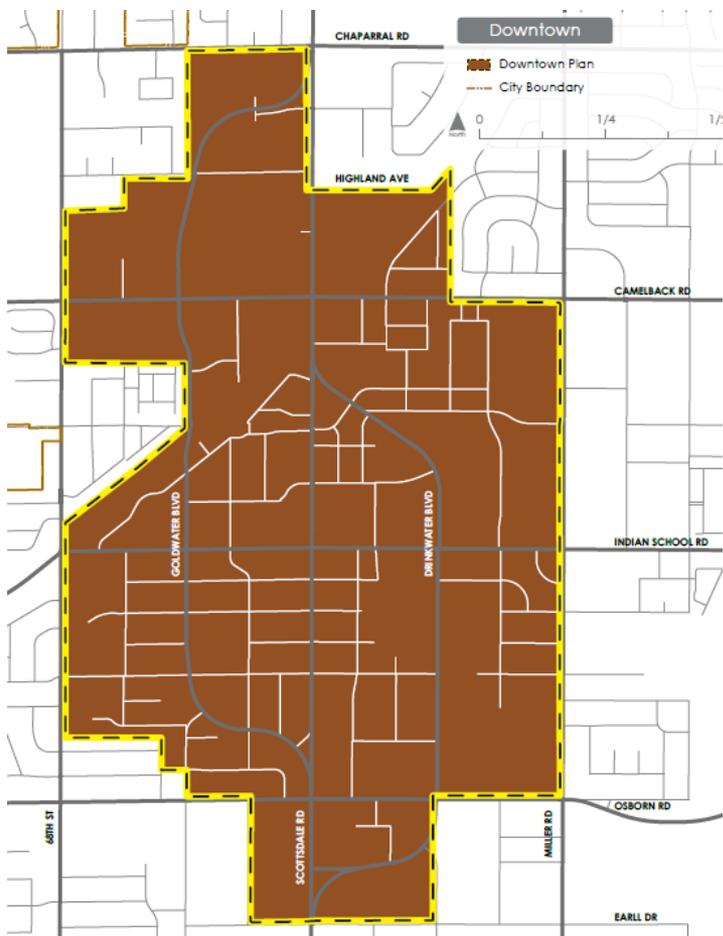
Perceptions of Downtown Scottsdale – Rationale

- Respondents were asked why each attribute was associated with Downtown Scottsdale. Some of their descriptions are featured below.



Refer to The Area As...

This Downtown Scottsdale map was shared with respondents and they were then asked to share how they refer to the area.



What do you call the area highlighted in the map			
	# of mentions		
	"Downtown"	"Old Town"	"Scottsdale"
Scottsdale Residents (n=11)	1	10	-
Metro Phoenix Residents (n=16)	5	7	4
Overall (n=27)	6	17	4

Detailed Findings by Geography

Unless otherwise noted, the sample sizes for each of the surveys are:

Phoenix Metro Area Residents (n=462)

Scottsdale Residents (n=158)

Tucson Residents (n=229)

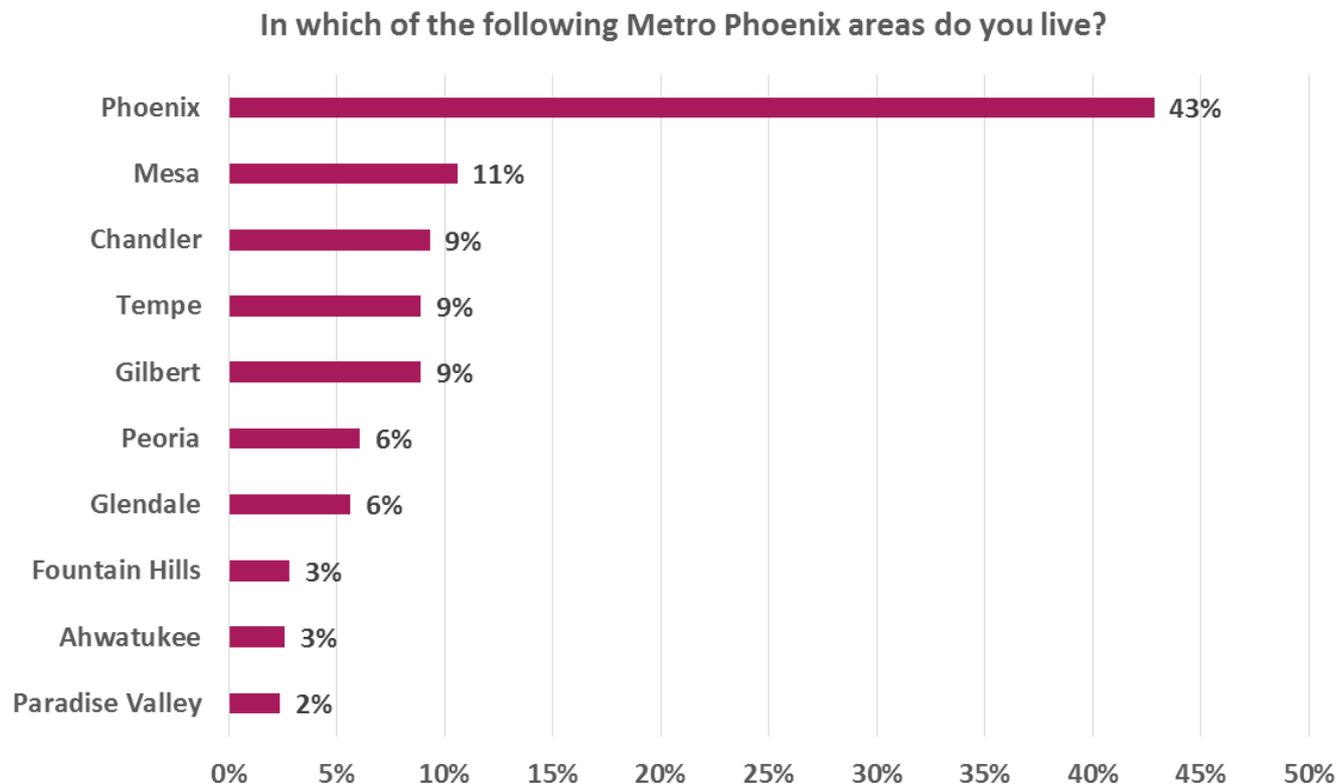
SCREENING CRITERIA

The following criteria were used to qualify participants:

- Residents of the following metropolitan areas:
 - *Phoenix Metro Area* (Ahwatukee, Chandler, Gilbert, Fountain Hills, Glendale, Mesa, Paradise Valley, Phoenix and Tempe)
 - *Scottsdale*
 - *Tucson Metro Area*
- Household income of \$65,000 above (singles \$50,000+), with those 66+ (\$75,000+, majority \$125,000+)
- Sometimes or frequently engage in at least 3 of the following activities:
 - *Attend festivals or events*
 - *Shop at boutiques or shopping malls*
 - *Go to a casual/fine dining restaurant*
 - *Go to art galleries*
 - *Experience nightlife*
- Willing to spend 30+ minutes driving to do an activity in the Phoenix area
- Open to doing leisure activities in Downtown Scottsdale
- Ages 25 and over

METRO PHOENIX CITY BREAKOUT

43% of the Phoenix metro respondents live in Phoenix proper, with a fairly even distribution residing Mesa (11%), Chandler (9%), Gilbert (9%), Tempe (9%), Glendale (6%) and Peoria (6%).



MOST FREQUENT WEEKEND ACTIVITIES

Which leisure activities do you most frequently do on weekends?



Go to a casual dining or fine dining restaurant

78%

85%

87%

Attend festivals or events (Farmer's Markets, Art Walk, etc.)

40%

49%

40%

Shop at a major shopping mall

41%

34%

37%

Experience nightlife at a bar/lounge

30%

28%

20%

Shop at smaller shops/boutiques

29%

26%

24%

MOST FREQUENT WEEKEND ACTIVITIES

Which leisure activities do you most frequently do on weekends?



Visit museums and theaters

24%

23%

21%

Visit attractions geared towards families

24%

15%

27%

Go to art galleries

4%

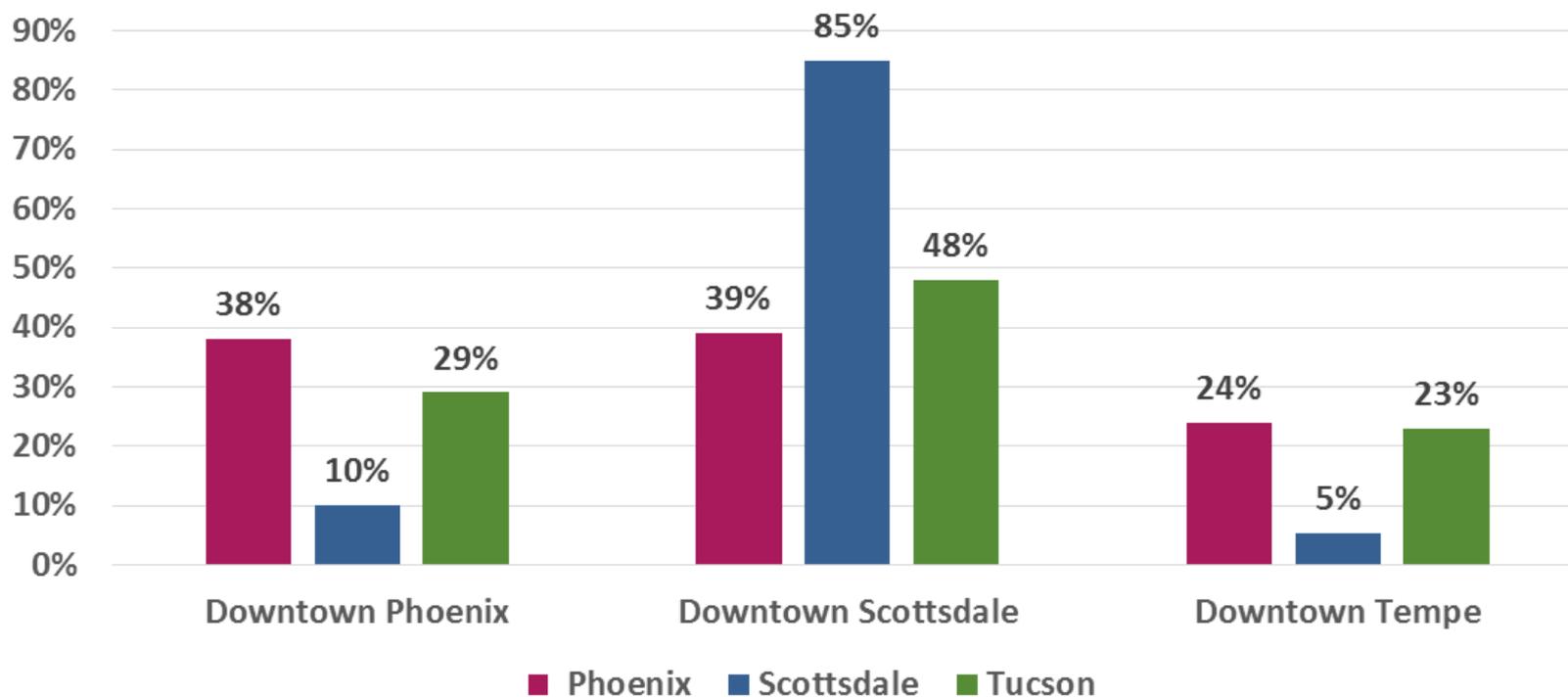
6%

4%

WEEKEND DESTINATION

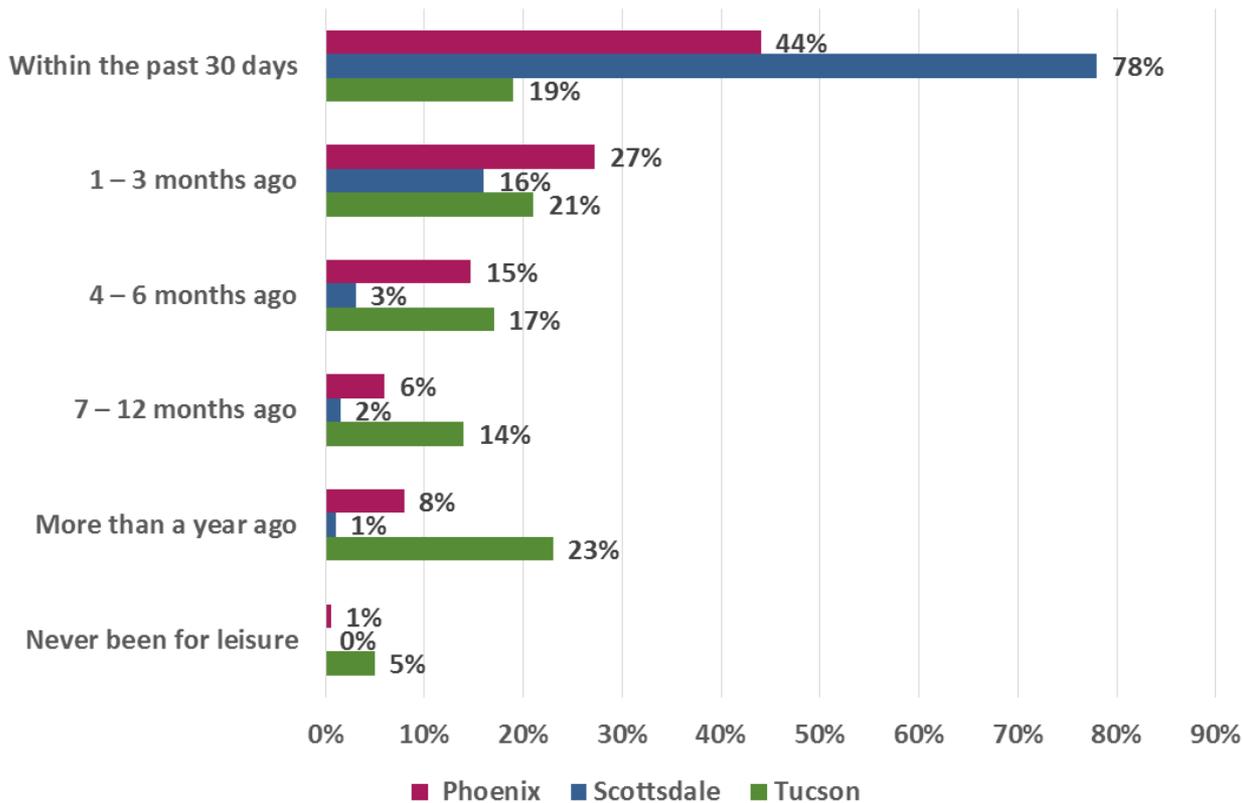
A significant majority of Scottsdale residents (85%) prefer to go to Downtown Scottsdale for weekend leisure activities over Downtown Phoenix or Downtown Tempe.

Which of these three downtown areas appeals to you most as a weekend destination for leisure activities?



DOWNTOWN SCOTTSDALE VISITS

When was the last time you visited Downtown Scottsdale for a leisure activity (dining, shopping, nightlife, etc.)?



Visited Downtown Scottsdale in the past 3 months

Scottsdale residents



Phoenix metro residents



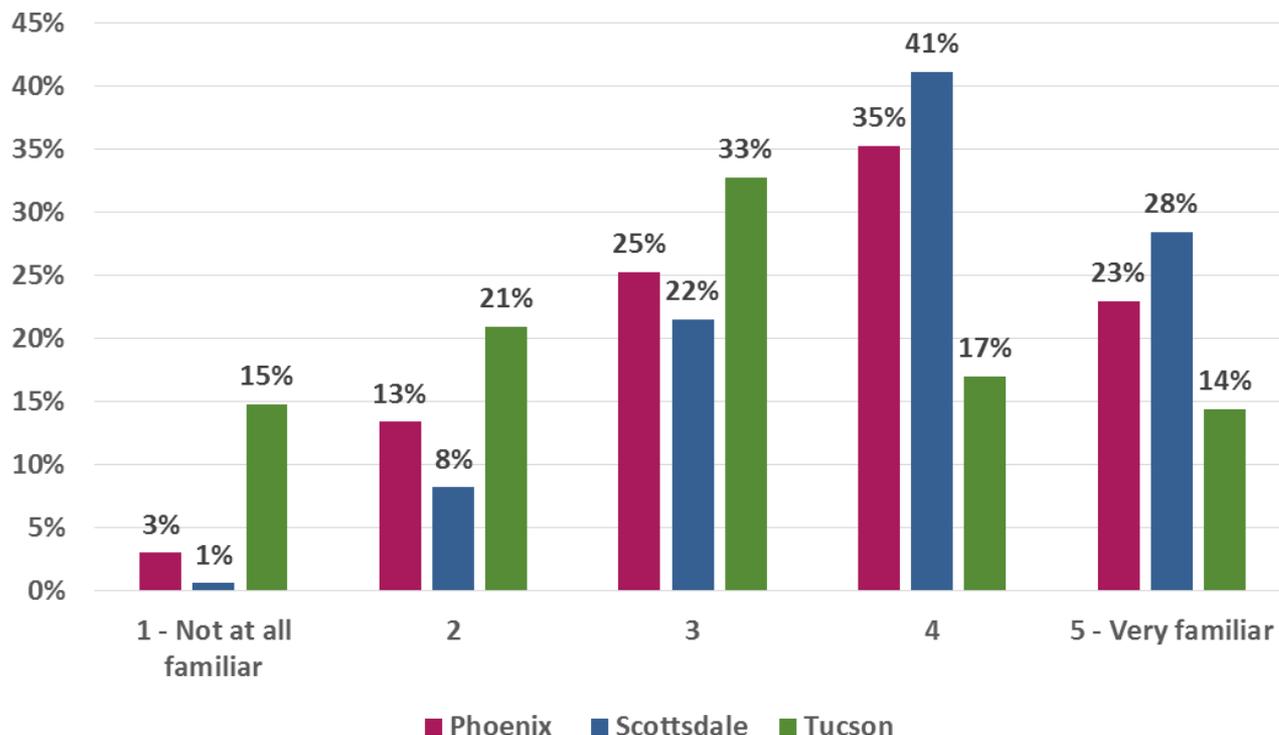
Tucson metro residents



DOWNTOWN SCOTTSDALE LEISURE ACTIVITIES

69% of Scottsdale residents rated their familiarity with Downtown Scottsdale leisure activities with a score of '4' or '5', while 58% of Phoenix metro residents and 31% of Tucson metro residents provided similar scores.

How familiar do you feel you are about all of the leisure activities and amenities that Downtown Scottsdale has to offer?



Mean Scores

Scottsdale residents



Phoenix metro residents

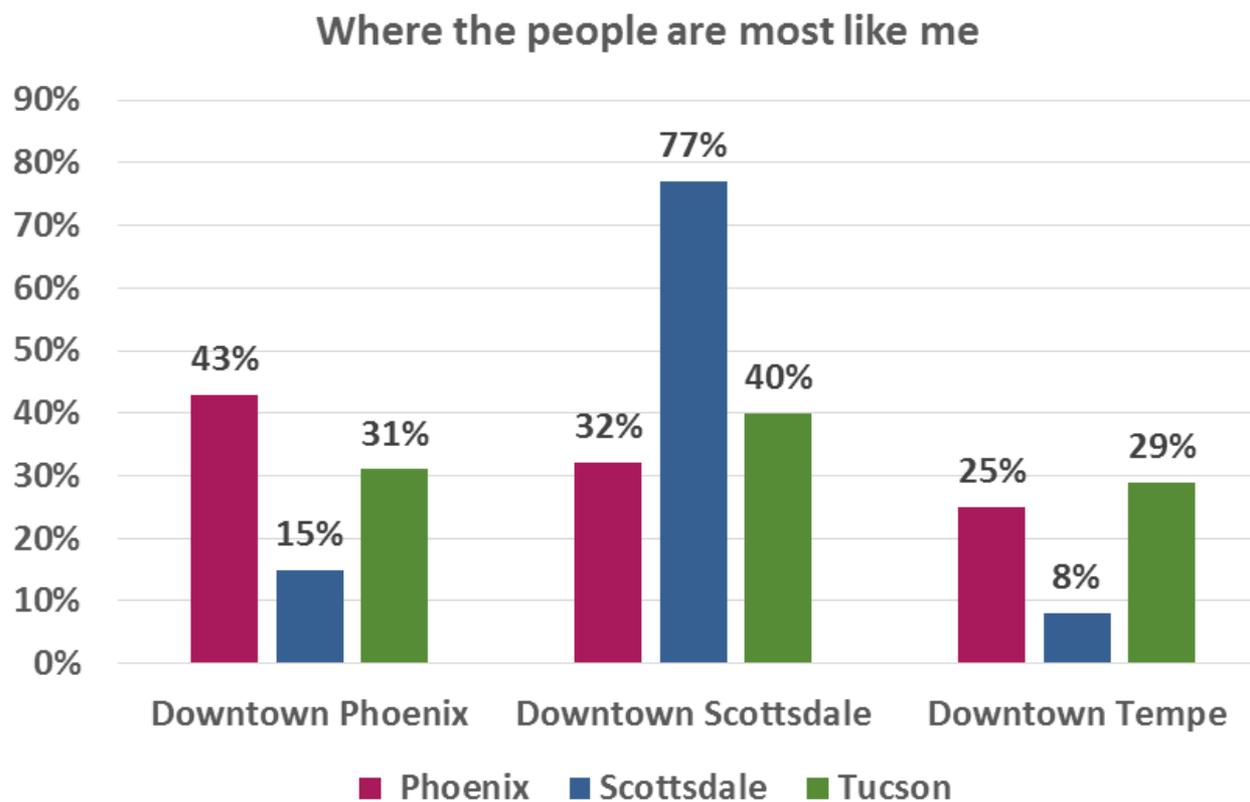


Tucson metro residents



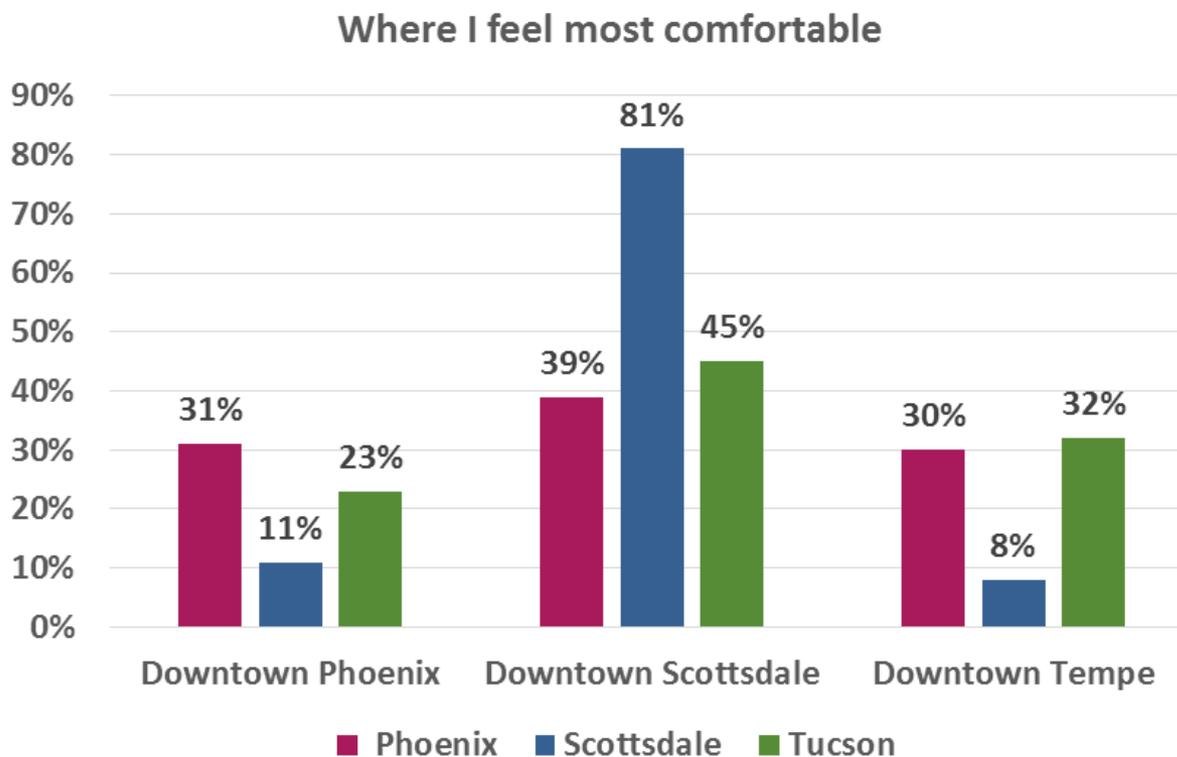
PEOPLE MOST LIKE ME

77% of Scottsdale residents felt that the people were most like them in Downtown Scottsdale, while 40% of Tucson and 32% of Phoenix metro residents expressed similar sentiments.



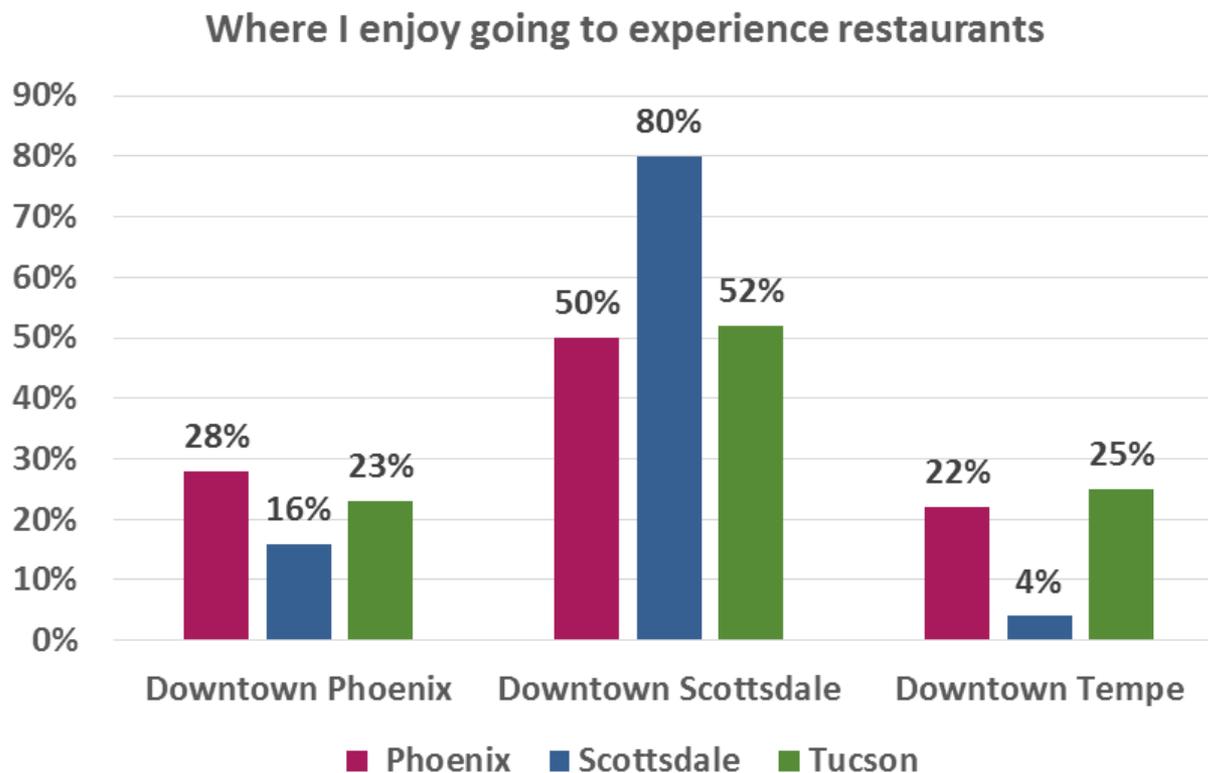
FEEL MOST COMFORTABLE

Tucson (45%) and Phoenix (39%) metro residents felt slightly more comfortable in Downtown Scottsdale than in the other two downtown areas, while Scottsdale residents (81%) were significantly more likely to feel comfortable in Downtown Scottsdale.



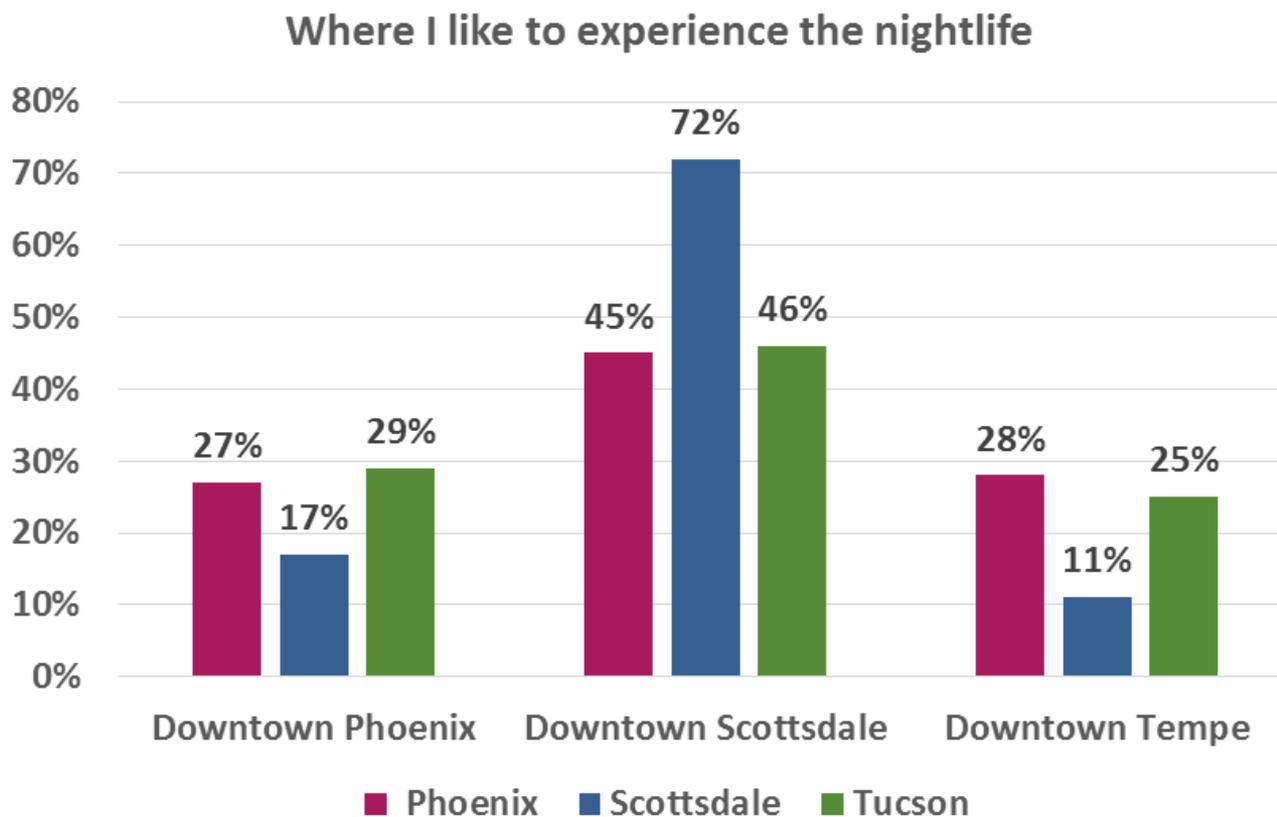
ENJOY GOING TO RESTAURANTS

Tucson (52%) and Phoenix (50%) metro residents identified that Downtown Scottsdale is where they enjoy going most to experience restaurants, while Scottsdale residents (80%) clearly felt that way.



LIKE TO EXPERIENCE NIGHTLIFE

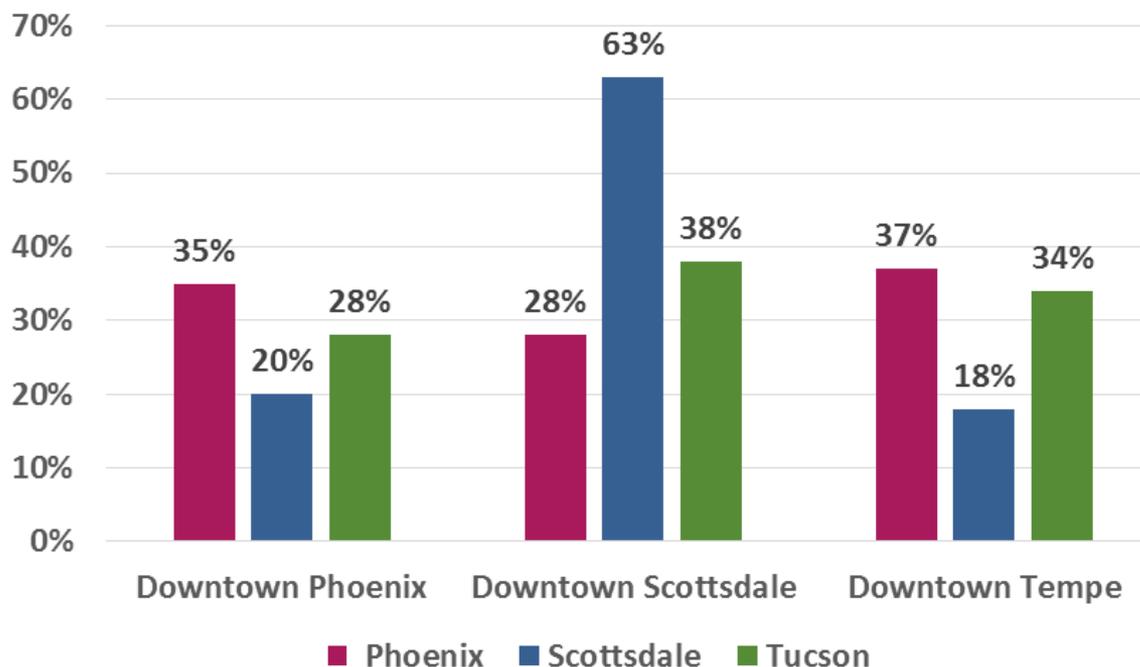
Downtown Scottsdale was viewed most commonly by all three audiences as the place to go to experience nightlife, with Scottsdale residents (72%) significantly more likely to hold these sentiments.



ENJOY OUTDOOR EVENTS AND FESTIVALS

Scottsdale residents (63%) were most likely to enjoy attending an outdoor event or festival in Downtown Scottsdale, while Phoenix and Tucson metro residents were more evenly divided across all three of the downtown areas presented.

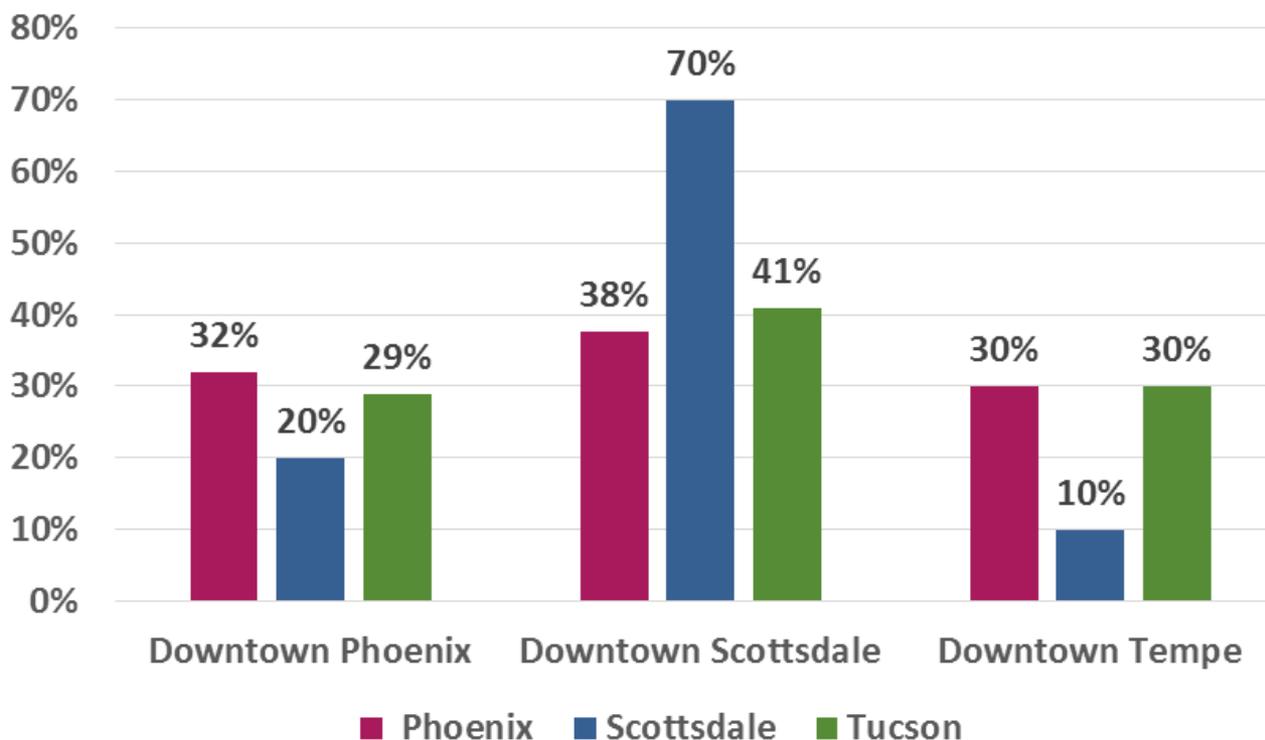
Where I enjoying attending outdoor events or festivals



ALWAYS SOMETHING FUN TO DO

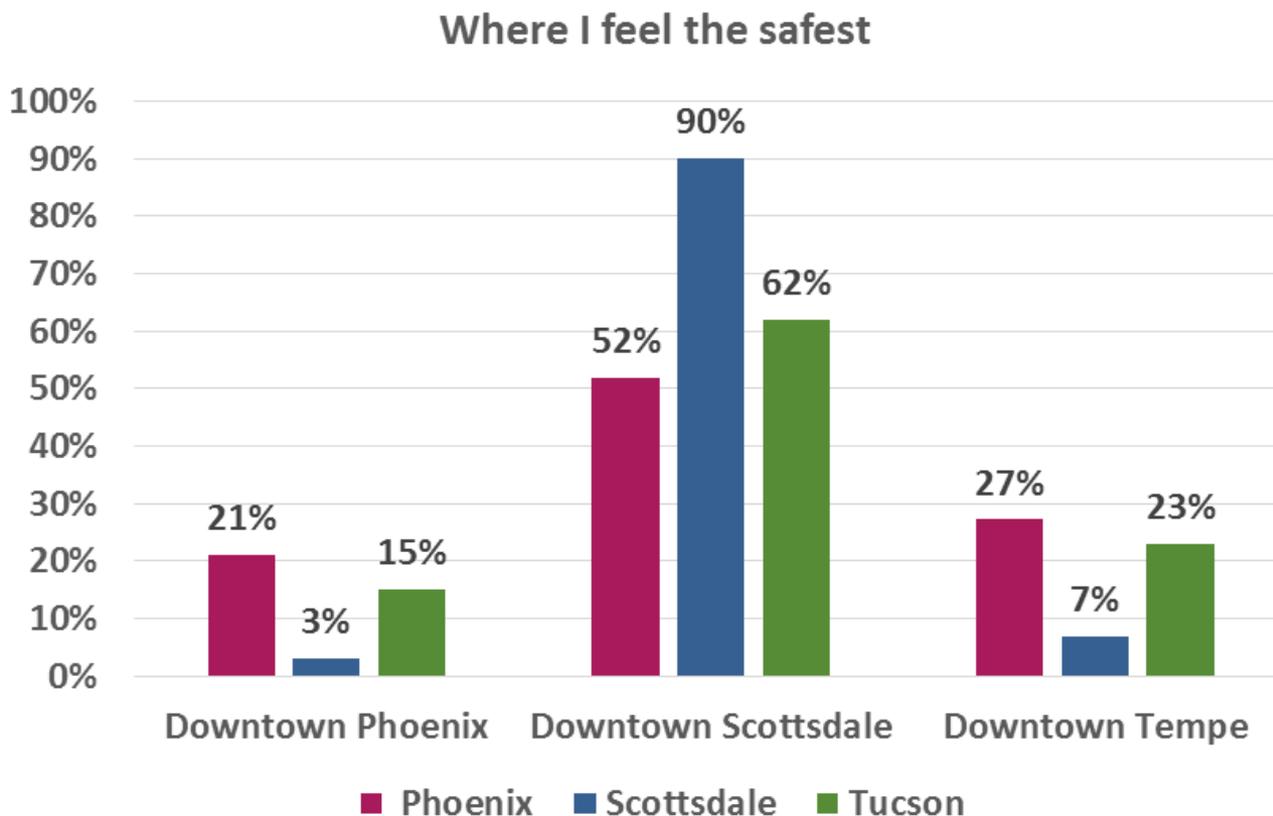
Phoenix and Tucson metro residents were fairly evenly split in terms of which downtown area always has something fun to do.

Where there is always something fun to do



WHERE I FEEL THE SAFEST

All three audiences felt that Downtown Scottsdale was the safest of the three downtown areas presented, with Scottsdale residents (90%) overwhelming feeling that it is the safest.



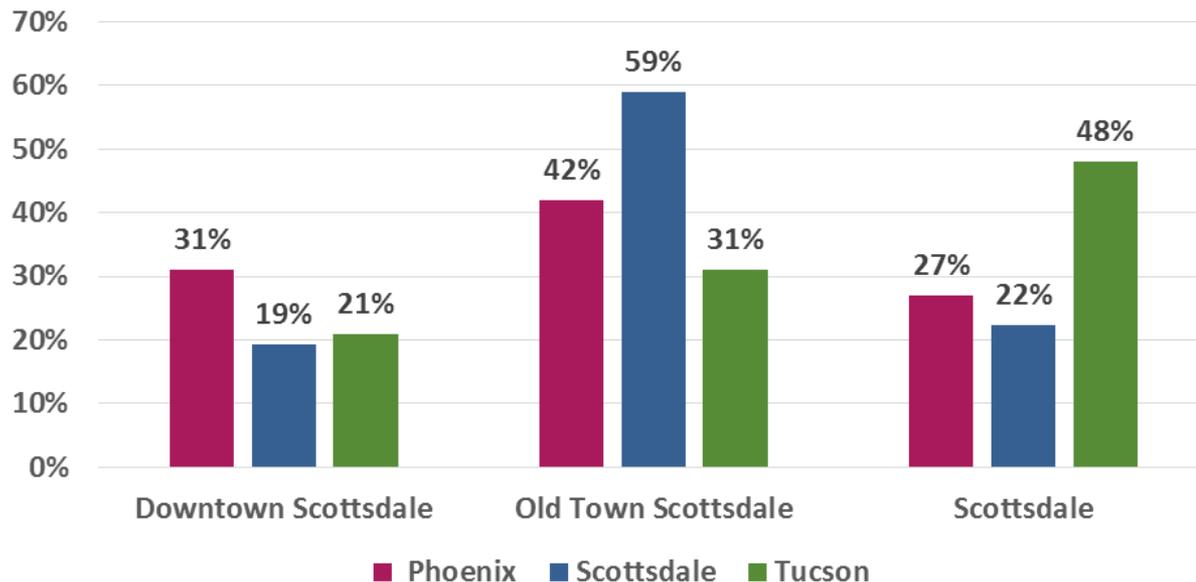
AREA DESCRIPTION

Residents of all three geographies used ‘Downtown Scottsdale’, ‘Old Town Scottsdale’ and ‘Scottsdale’ to varying degrees to describe the same area.

Area Description Provided

The center of Scottsdale is located at the intersection of Indian School and Scottsdale Roads. It extends north to Chaparral Road and south to Earll Drive and it extends to Miller Road on the east and west to 68th Street.

If you were to tell a friend or family member that you are going to this area, which of the following descriptions would you use to tell them where you are headed?



UNAIDED: DESCRIPTION OF DOWNTOWN

UNAIDED: Based on your experiences or what you have heard, how would you describe Downtown Scottsdale? (n=712)

Comment:	% of respondents
Great Restaurants (Good Food)	29%
Shopping (Boutiques, Fashion Square)	22%
Fun	16%
A lot of things to do/see	11%
High-End/Upscale	9%
Good/Great/Nice	9%
Nightlife	8%
Great place to visit/hang out	8%
Hip/Trendy/Happening Place	7%
Expensive	7%
Art Galleries/Museums	7%
Safe	6%
Variety of bars/breweries	6%
Lively/Energetic	5%
Misc.	6%

- Respondents most commonly described Downtown Scottsdale based on having great restaurants/food (29%) and offering great shopping at Fashion Square and boutiques (22%).
- Downtown Scottsdale was also described as being fun (16%), with lots to do (11%).



THE SCOTTSDALE EXPERIENCE

Words	Phoenix	Scottsdale	Tucson
Safe	20%	31%	22%
Lively	20%	30%	16%
Fun	24%	30%	26%
Trendy	28%	27%	26%
Touristy	26%	23%	14%
Vibrant	14%	22%	16%
Friendly	18%	20%	17%
Energetic	15%	16%	8%
Pricey	28%	15%	34%
Distinctive	10%	15%	10%
Approachable	9%	11%	6%
Sophisticated	11%	9%	21%
Hip	6%	8%	8%
Fresh	6%	8%	5%
Pretentious	11%	6%	13%
Snooty	11%	5%	10%
Luxurious	10%	5%	16%
Glamorous	8%	4%	7%
Romantic	5%	3%	3%
Chaotic	3%	3%	3%
Arrogant	4%	2%	3%
Edgy	2%	2%	5%
Dated	5%	1%	3%
Other	1%	0%	1%

Respondents were presented with a list of 22 descriptive words and were asked to select up to three that best describes their experience with Downtown Scottsdale. They also had an option to add words that were not on the list.

- Scottsdale residents chose words like ‘Safe’, ‘Fun’, ‘Lively’, and ‘Trendy’ most frequently to describe Downtown Scottsdale.
- Phoenix metro residents most commonly selected ‘Trendy’, ‘Pricey’, ‘Touristy’, ‘Fun’, ‘Safe’ and ‘Lively’.
- ‘Pricey’, ‘Trendy’, ‘Fun’, ‘Safe’ and ‘Sophisticated’ were the most prevalent words selected by Tucson metro residents to describe the area. These respondents were also less likely of the three geographies to chose ‘Energetic’ to describe Downtown Scottsdale.

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

ELEMENTS OF DOWNTOWN SCOTTSDALE

Old Town Scottsdale and Scottsdale Fashion Square were most commonly identified as being part of Downtown Scottsdale across all three audiences.

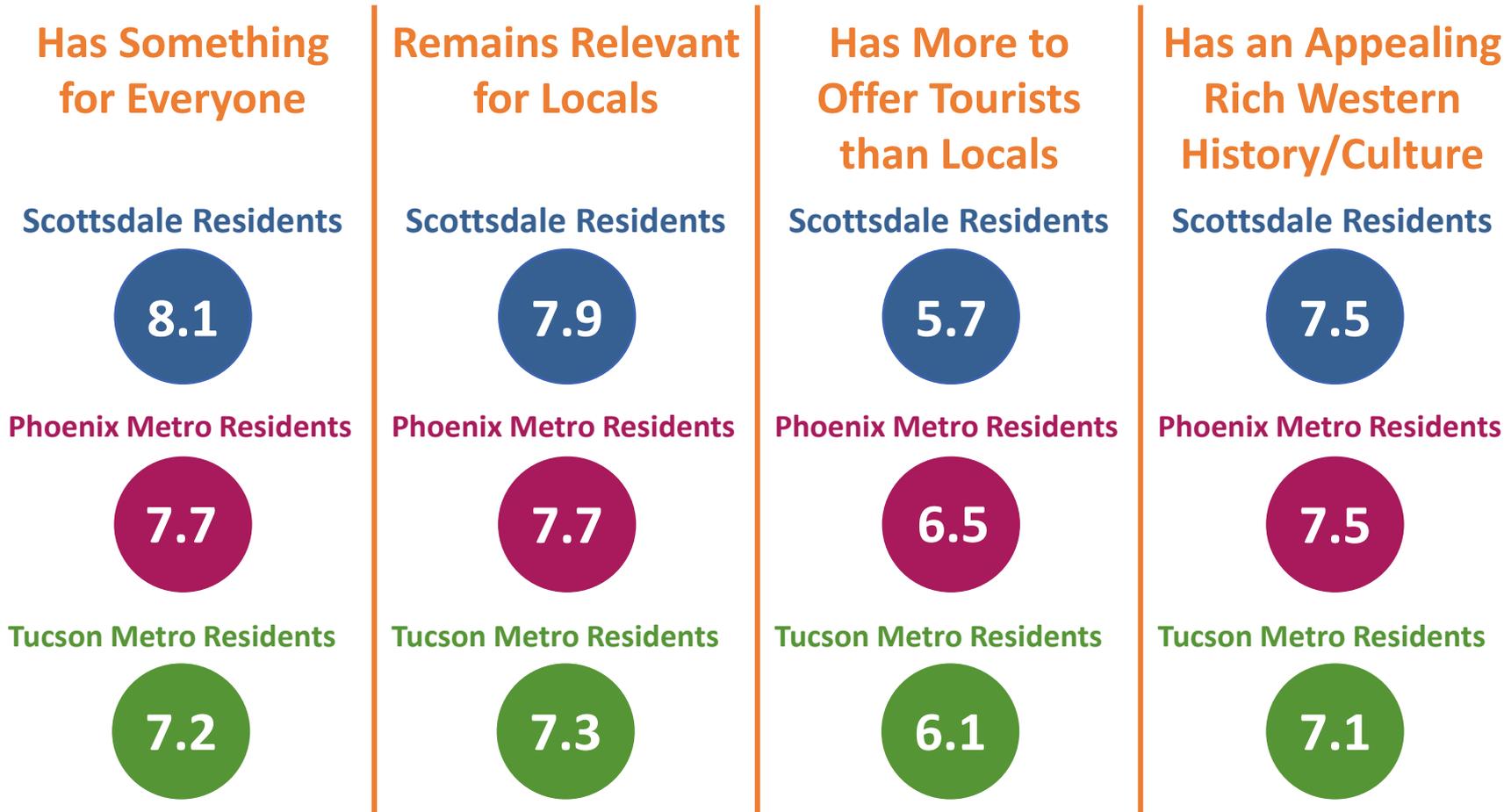
- As would be expected, Scottsdale residents had the greatest awareness as to which other areas/attractions are part of the downtown area.

Which of the following are part of what you consider to be Downtown Scottsdale?	Phoenix	Scottsdale	Tucson
Old Town Scottsdale	66%	84%	52%
Scottsdale Fashion Square	59%	67%	52%
Scottsdale Arts District	50%	66%	41%
Scottsdale Civic Center	47%	65%	31%
The Waterfront/Southbridge	32%	62%	17%
5th Avenue Shops and Boutiques	48%	58%	38%
Scottsdale Stadium	28%	46%	17%
The Entertainment District	32%	34%	29%
Scottsdale Quarter	21%	13%	21%
Kierland Commons	14%	7%	11%
OdySea Aquarium	10%	5%	10%
Other	0%	1%	3%

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

STATEMENT AGREEMENT: MEAN SCORES

Downtown Scottsdale...

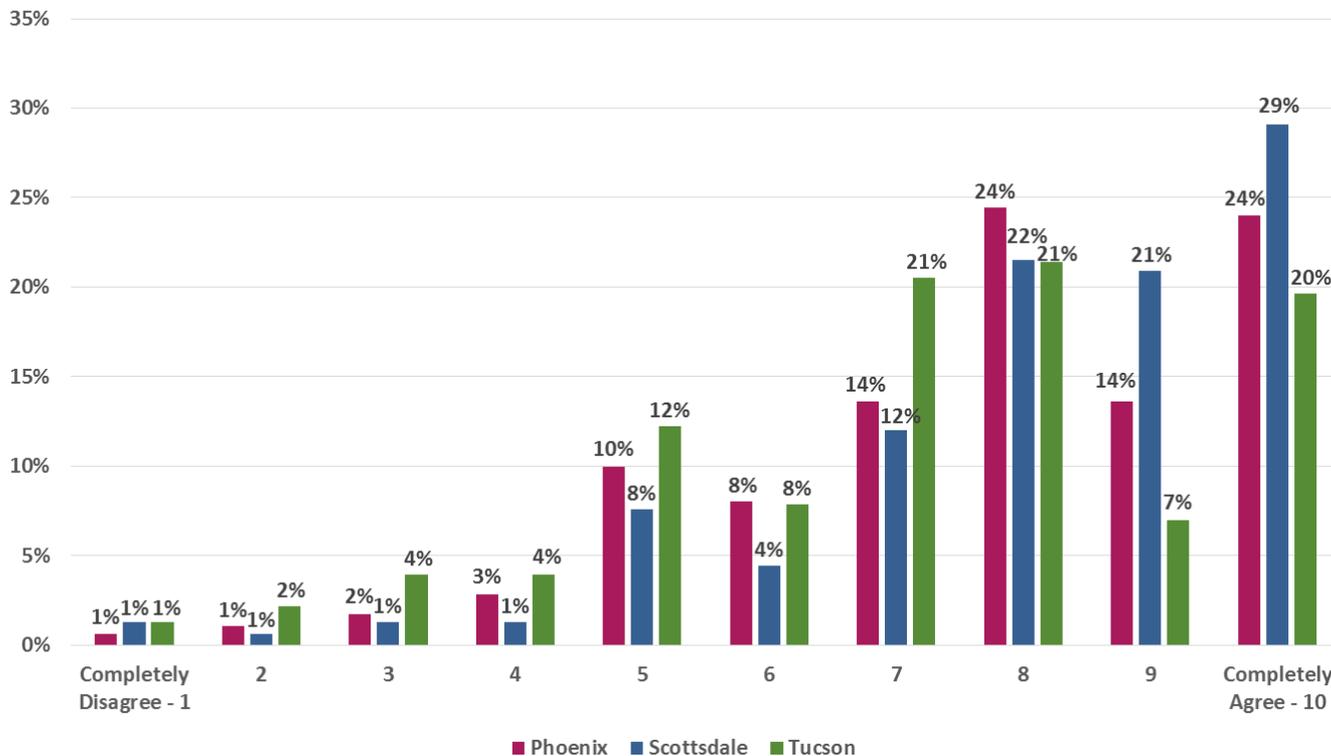


Mean scores based on a 1 to 10 scale where '1' is Completely Disagree and '10' is Completely Agree.

SOMETHING FOR EVERYONE

Half of the Scottsdale residents provided a rating of '9' or '10' in response to 'Downtown Scottsdale has something to offer for everyone', while 38% of Phoenix and 27% of Tucson metro residents did the same.

Downtown Scottsdale has something to offer for everyone.



Mean Scores

Scottsdale residents



Phoenix metro residents



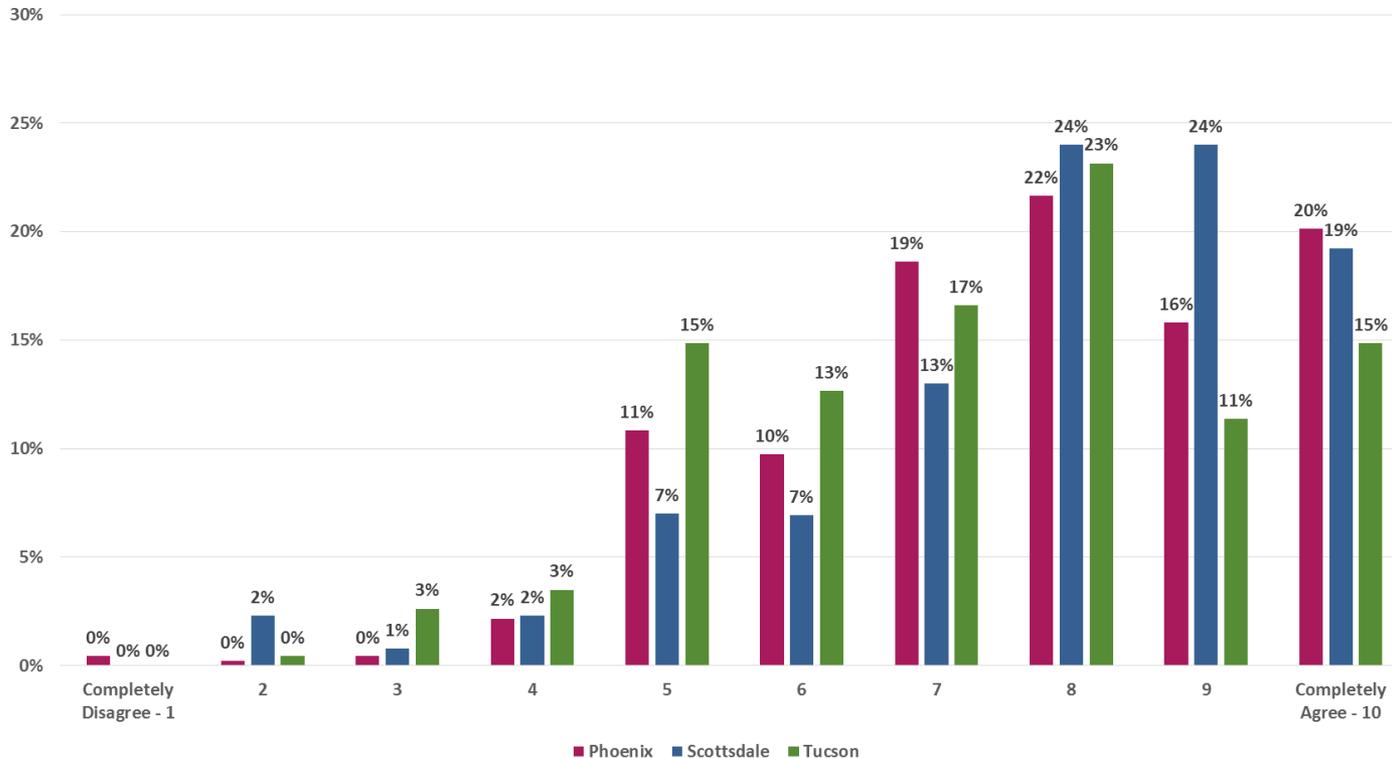
Tucson metro residents



REMAINS RELEVANT

67% of Scottsdale and 58% of Phoenix metro residents provided a score of '8' or higher in response to their perceptions around Downtown Scottsdale remaining relevant to local residents, while 49% of Tucson metro residents offered similar scores.

Downtown Scottsdale remains relevant in what it has to offer local residents of the Phoenix metro area.



Mean Scores Scottsdale residents

7.9

Phoenix metro residents

7.7

Tucson metro residents

7.3



MORE TO OFFER FOR TOURISTS

With a mean score of 6.5, Phoenix metro residents were the most likely to feel that Downtown Scottsdale has more to offer for tourists than for local residents, while Scottsdale residents (5.7) were least likely to feel that way.

Mean Scores

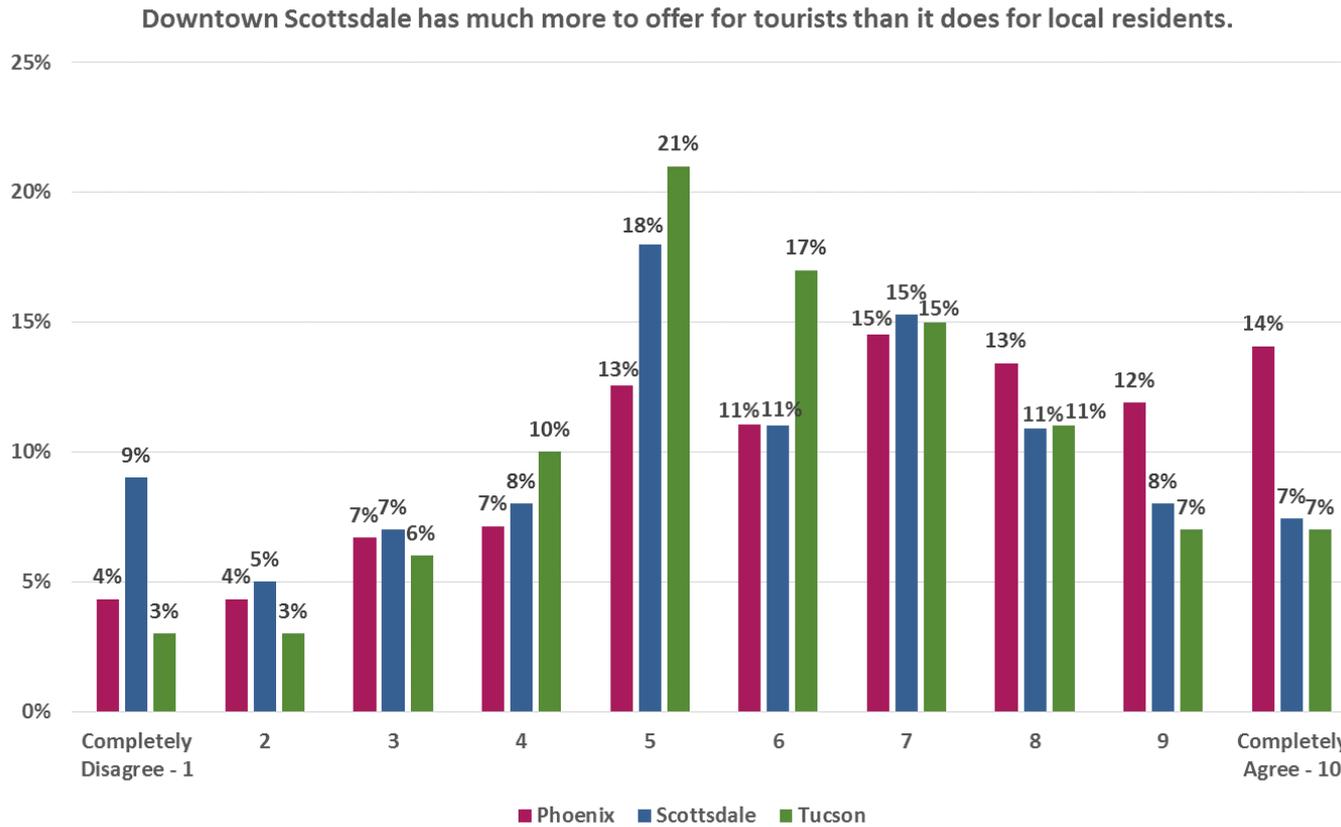
Scottsdale residents



Phoenix metro residents



Tucson metro residents



A RICH WESTERN HISTORY AND CULTURE

62% of Scottsdale and 55% of Phoenix metro residents provided a score of '8' or higher in response to their perceptions of Downtown Scottsdale's offering a rich western history and culture, while 43% of Tucson metro residents offered similar scores.

Mean Scores

Scottsdale residents



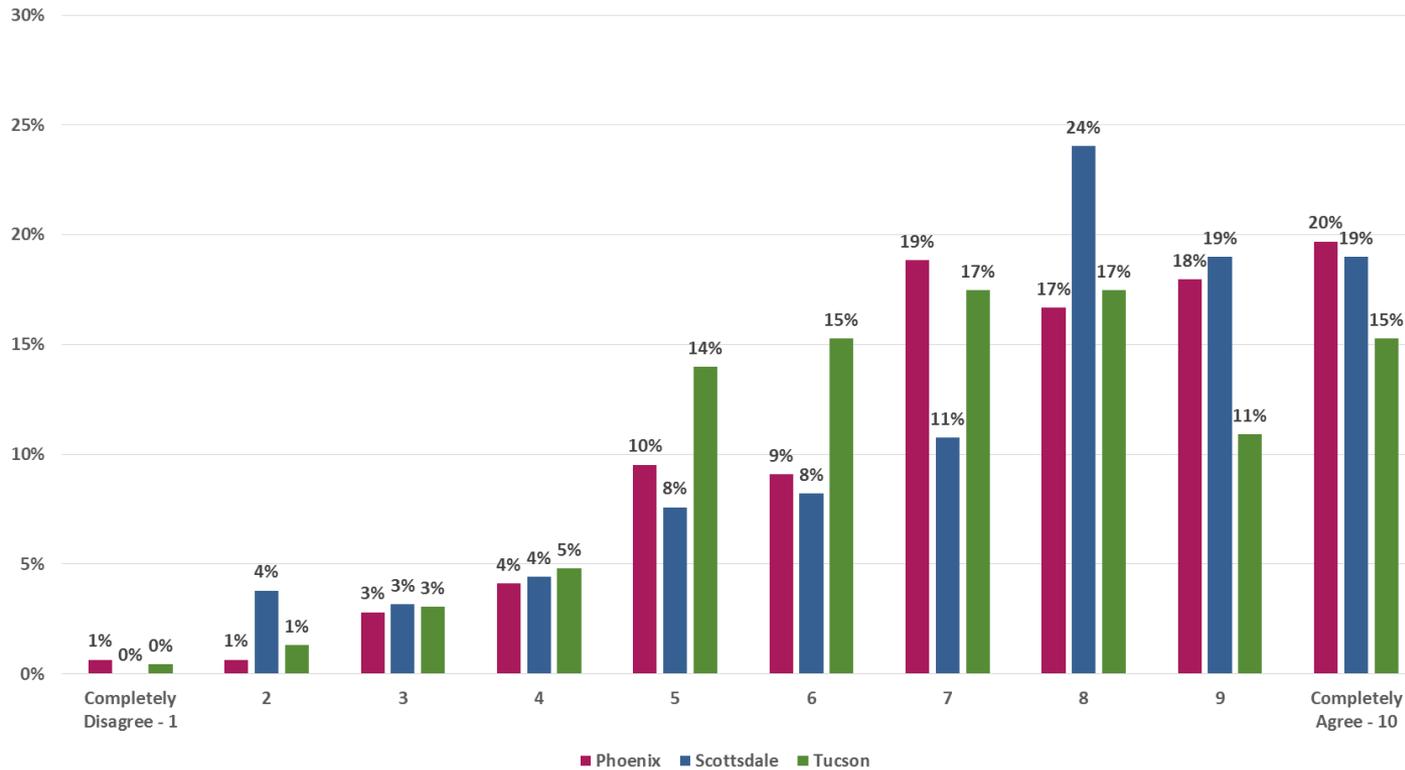
Phoenix metro residents



Tucson metro residents



Downtown Scottsdale has a rich western history and culture that is very appealing.



UNAIDED: UNIQUELY OFFER

UNAIDED: What does Downtown Scottsdale uniquely offer that you will not find elsewhere in the Phoenix metro area? (n=712)

Comment:	% of respondents
Restaurants (selection, unique, trendy)	20%
Western History/Theme	9%
Unique Shops/Boutiques (western, specialty, ice cream parlors)	9%
Safety (safe environment)	8%
Walkability (condensed area, easy to go place to place)	8%
Shopping (general)	5%
Art Galleries	5%
Great Nightlife	5%
Variety (a lot of options)	4%
Old Town (active, charm, streets)	4%
Nothing special/unique	4%
Fun/Lively Environment/Atmosphere	3%
Bars/Clubs	3%
Fancy/Upscale	3%
High-end Shopping	3%
Small Town (feel, appeal)	3%
Misc. comments	10%
Don't Know/Unsure	12%

- When thinking about the Phoenix metro area, one out of five respondents felt the breadth and depth of restaurants was unique to Downtown Scottsdale.
- Other major areas of perceived differences included the western history/theme (9%) and unique shops/boutiques (9%).
- For some, a safe environment (8%) and easily being able to walk from place to place (8%) were also sources of distinction.

MOTIVATES VISIT TO DOWNTOWN SCOTTSDALE

All three audiences felt the variety of restaurants available in Downtown Scottsdale motivated them to go to there, with this being especially true for Scottsdale residents (85%).

What motivates you to go to Downtown Scottsdale?	Phoenix	Scottsdale	Tucson
Variety of restaurants	64%	85%	59%
Walkability/close proximity of shops, restaurants, bars, etc.	52%	67%	41%
A safe environment	45%	61%	50%
Variety of shops/shopping opportunities	46%	59%	43%
Major festivals and events	40%	56%	25%
A lively and energetic vibe	34%	44%	27%
Plenty of nightlife options	30%	40%	21%
Art galleries	21%	31%	17%
Museums and theaters	20%	27%	13%
Diversity of people	21%	20%	15%
Other	3%	3%	8%

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

CHILDREN AND DOWNTOWN SCOTTSDALE

More than half of respondents in all three geographic areas indicated that they take their children to Downtown Scottsdale to enjoy activities that are designed to appeal to families.

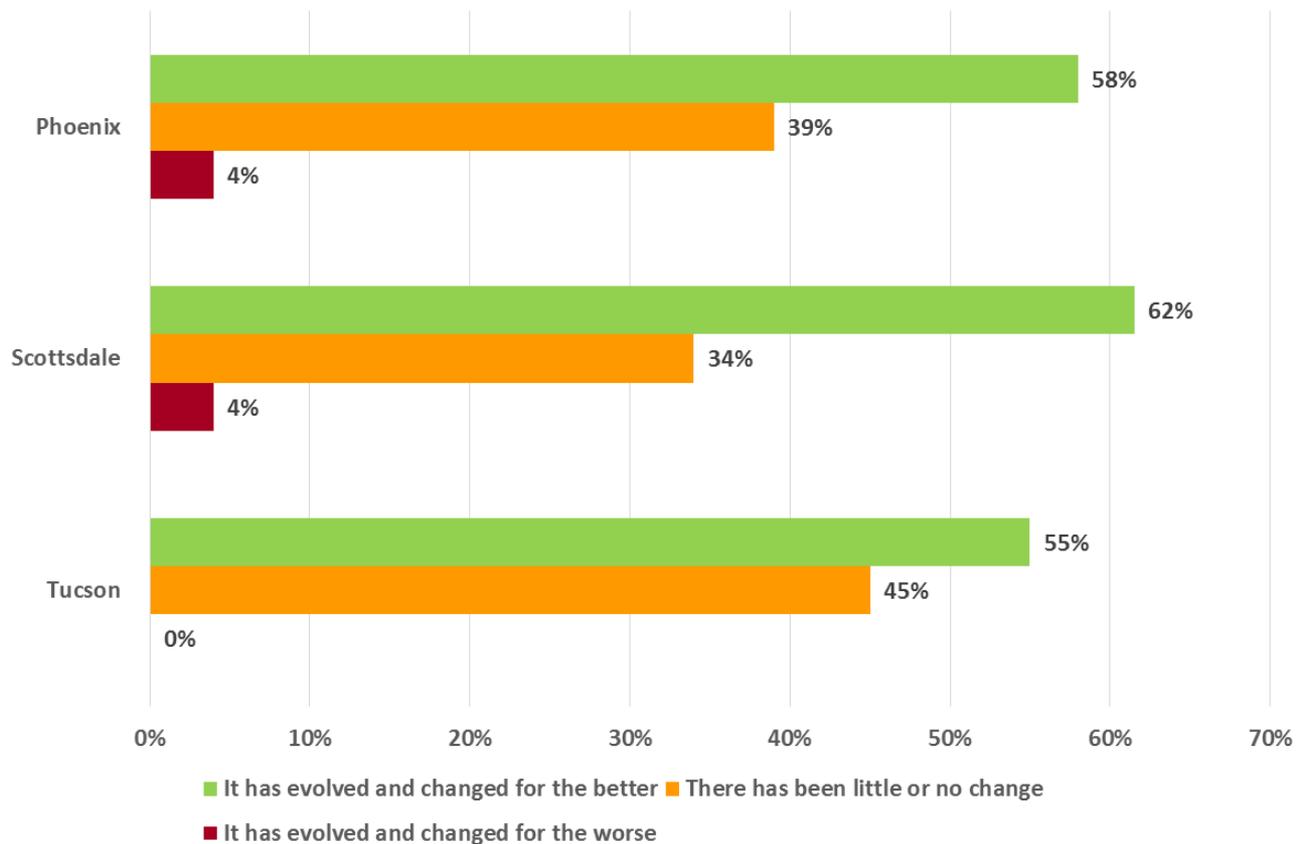
Which of the following statements best describes your feelings about taking your children with you to experience Downtown Scottsdale?*	Phoenix (n=205)	Scottsdale (n=50)**	Tucson (n=91)
We take our children to Downtown Scottsdale to enjoy some of the activities that are specifically designed to appeal to families.	59%	52%	62%
We take our children to Downtown Scottsdale, but it is usually to do activities that are not specific for children, like dining, events or festivals.	28%	38%	24%
Because there are not many activities that are specifically designed to appeal to families, we tend not to take our children to Downtown Scottsdale.	13%	10%	14%

**These results reflect respondents who have children 18 years old or younger living in their home.*

***The sample size for Scottsdale residents is small and caution should be used when generalizing the results to the general population.*

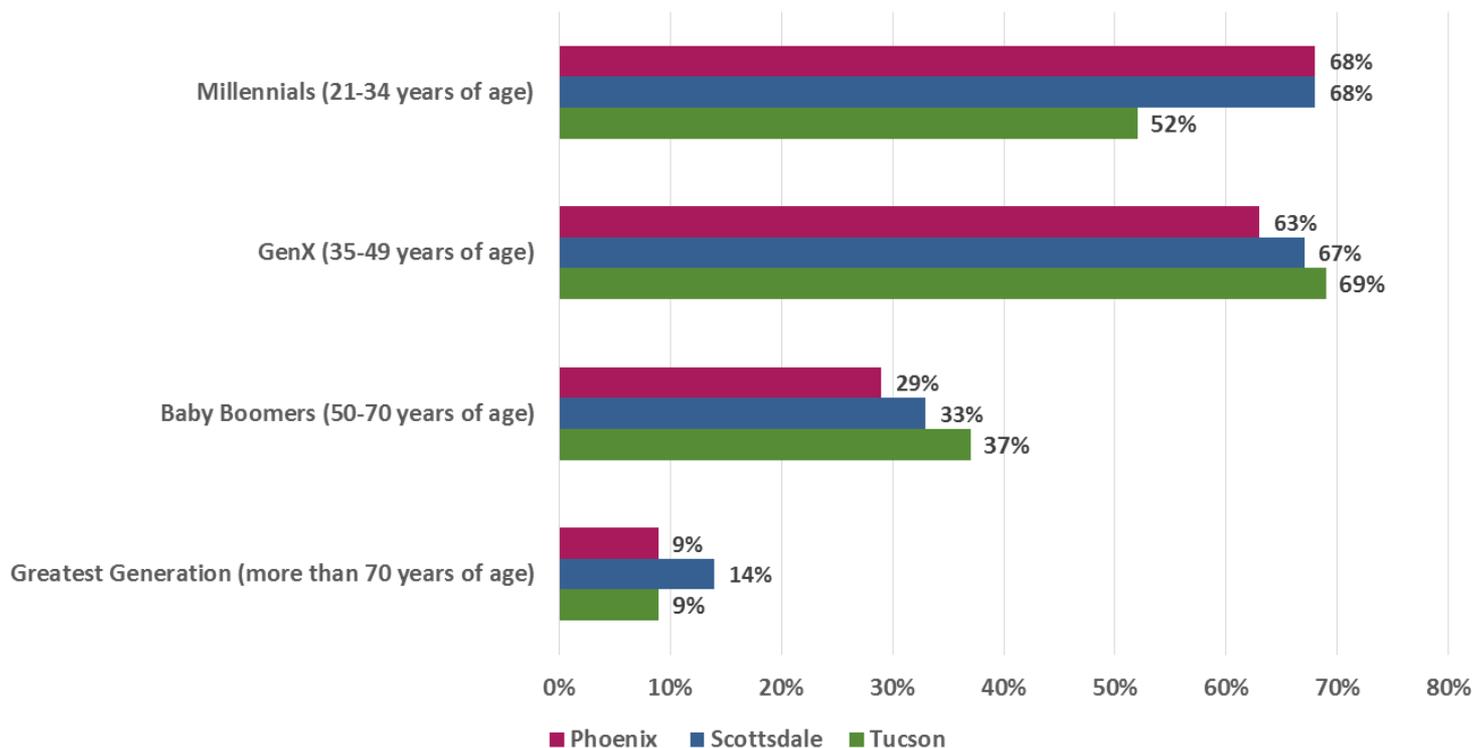
DOWNTOWN SCOTTSDALE CHANGES

Which of the following best describes how you feel as to whether or not Downtown Scottsdale has evolved and changed over the past 3 years?



TRYING TO ATTRACT...

Based on your experiences, who do you think that Downtown Scottsdale is trying to attract?



Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

BARRIERS TO GOING TO DOWNTOWN SCOTTSDALE

All three audiences felt that parking in Downtown Scottsdale was an issue, with this being especially true for Scottsdale (35%) and Phoenix metro (36%) residents.

What, if anything, deters you from going to Downtown Scottsdale to experience leisure activities more often?	Phoenix	Scottsdale	Tucson
Not enough parking	36%	35%	29%
Nothing deters me from going to Downtown Scottsdale	22%	30%	22%
Too crowded/too many people	23%	26%	14%
Too expensive	35%	18%	43%
Too touristy	18%	17%	14%
Not enough options for public transportation	8%	9%	7%
Snooty and arrogant attitude of others	23%	8%	20%
Not enough diversity among people	7%	6%	7%
Nothing that I can't experience elsewhere in the Valley	11%	6%	5%
Lack of appealing options for dining, shopping or entertainment	5%	4%	6%
Unfriendly workers in the shops and restaurants	5%	4%	3%
Other	4%	7%	11%

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

SOURCES OF INFORMATION ABOUT EVENTS

What sources of information do you rely upon most often to find out about events that might be taking place in Downtown Scottsdale?	Phoenix	Scottsdale	Tucson
Word of mouth	39%	48%	34%
Social Media (Facebook, Instagram, Twitter, etc.)	35%	30%	32%
Arizona Republic	28%	23%	10%
Search engines (Google, Yahoo, Bing, etc.)	31%	19%	33%
Magazines (Trends, Scottsdale Lifestyle, Phoenix Magazine, etc.)	17%	19%	18%
City of Scottsdale website (www.cityofscottsdale.com)	12%	18%	11%
Area websites (ExperienceScottsdale.com, DowntownScottsdale.com, etc.)	17%	16%	24%
TV	16%	15%	10%
Phoenix New Times	18%	11%	7%
User Review Websites (Yelp, TripAdvisor, etc.)	11%	11%	17%
Email newsletters	8%	8%	7%
Radio	14%	7%	10%
Other	1%	2%	4%

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

INFORMATION ON RESTAURANTS

When thinking specifically of finding information about restaurants in Downtown Scottsdale, what sources of information do you rely upon most heavily?	Phoenix	Scottsdale	Tucson
Word of mouth	40%	56%	34%
Yelp	23%	40%	27%
Search engines (Google, Yahoo, Bing, etc.)	32%	23%	35%
Specific restaurant websites	17%	16%	16%
Social Media (Facebook, Instagram, Twitter, etc.)	25%	15%	23%
TripAdvisor	15%	13%	23%
OpenTable	11%	13%	12%
Arizona Republic	17%	11%	8%
AzCentral.com	11%	10%	6%
Area websites (ExperienceScottsdale.com, DowntownScottsdale.com, etc.)	11%	8%	17%
Phoenix New Times	18%	8%	5%
Magazines (Trends, Scottsdale Lifestyle, Phoenix Magazine, etc.)	16%	13%	10%
Other	2%	1%	6%

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

Analysis by Age

Unless otherwise noted, the sample sizes for each of the surveys are:

25-29 (n=73)*

30-39 (n=245)

40-49 (n=133)

50-59 (n=163)

60-65 (n=98)*

66+ (n=137)

*Sample sizes are relatively small and caution should be used in generalizing the results to a larger audience.

Note: Due to rounding, some of the totals in slides 40-48 not add up to 100%

MOST FREQUENT WEEKEND ACTIVITIES

Going to a casual or fine dining restaurant was the most frequent weekend activity across all age groups, with those who are 50 years old and above significantly more likely to do so.

- Those who are between the ages of 25 and 49 were much more likely to experience nightlife at a bar or lounge and to visit attractions geared towards families.

Which leisure activities do you most frequently do on weekends?	25-29 years old	30-39 years old	40-49 years old	50-59 years old	60-65 years old	66 and above
Go to a casual dining or fine dining restaurant	71%	69%	83%	91%	92%	91%
Experience nightlife at a bar or lounge	48%	38%	35%	21%	10%	8%
Shop at a major shopping mall	45%	43%	31%	38%	36%	35%
Attend festivals or events	30%	40%	38%	45%	49%	47%
Visit attractions geared towards families	30%	38%	31%	15%	11%	4%
Visit museums or theaters	27%	22%	17%	26%	17%	27%
Shop at smaller shops and boutiques	25%	24%	34%	26%	27%	28%
Go to art galleries	10%	6%	6%	2%	1%	3%
Other	0%	3%	5%	8%	11%	12%

DOWNTOWN SCOTTSDALE VISITS

When was the last time you visited Downtown Scottsdale for a leisure activity (dining, shopping, nightlife, etc.)?	25-29 years old	30-39 years old	40-49 years old	50-59 years old	60-65 years old	66 and above
Within the past 30 days	47%	49%	50%	44%	31%	34%
1 – 3 months ago	33%	24%	27%	19%	17%	26%
4 – 6 months ago	16%	15%	8%	12%	16%	12%
7 – 12 months ago	3%	4%	7%	6%	15%	13%
More than a year ago	1%	7%	7%	17%	16%	14%
Never been for leisure	0%	1%	2%	2%	4%	1%

Visited Downtown Scottsdale in the past 3 months

25-29
Years Old



30-39
Years Old



40-49
Years Old



50-59
Years Old



60-65
Years Old



66 and
above



DOWNTOWN SCOTTSDALE LEISURE ACTIVITIES

The level of familiarity with leisure activities and amenities that Downtown Scottsdale has to offer was highest among the younger respondents and decreased as the age segments increased.

How familiar do you feel you are about all of the leisure activities and amenities that Downtown Scottsdale has to offer?

Mean Scores

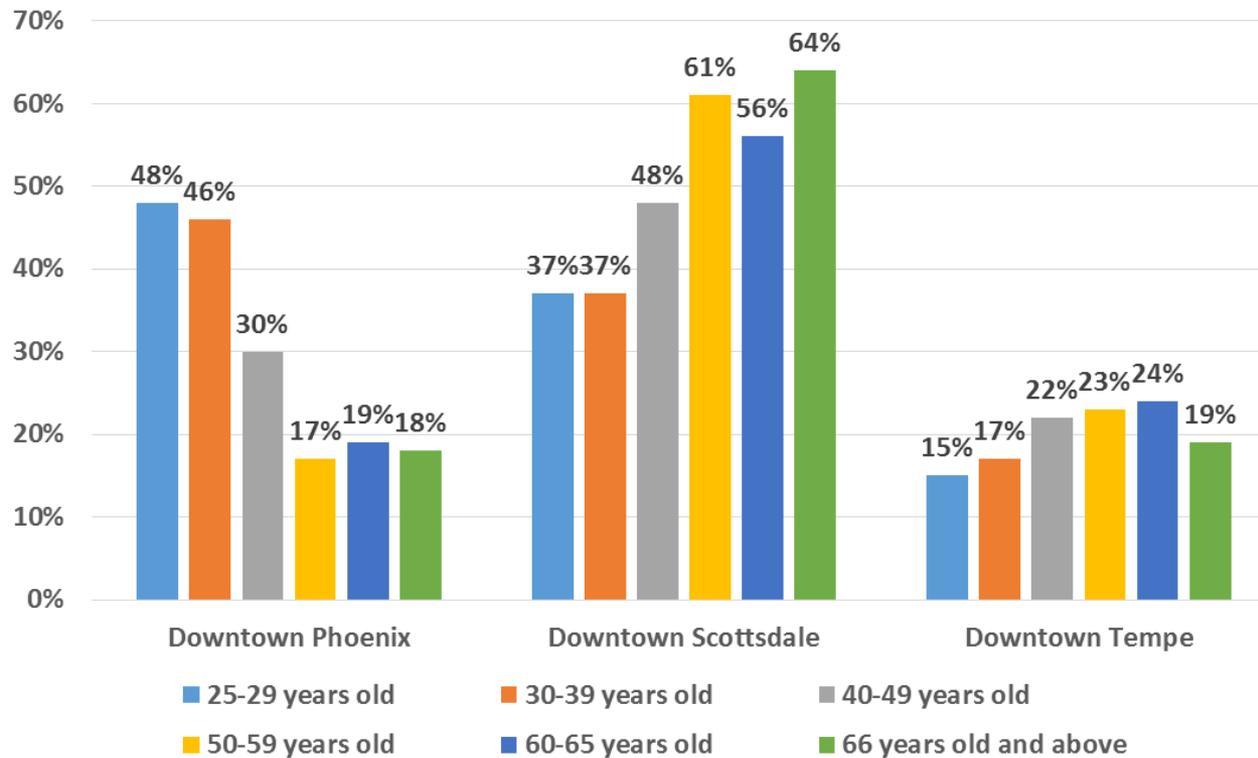


Mean scores based on a 1 to 5 scale where '1' is Not At All Familiar and '5' is Very Familiar.

WEEKEND DESTINATION

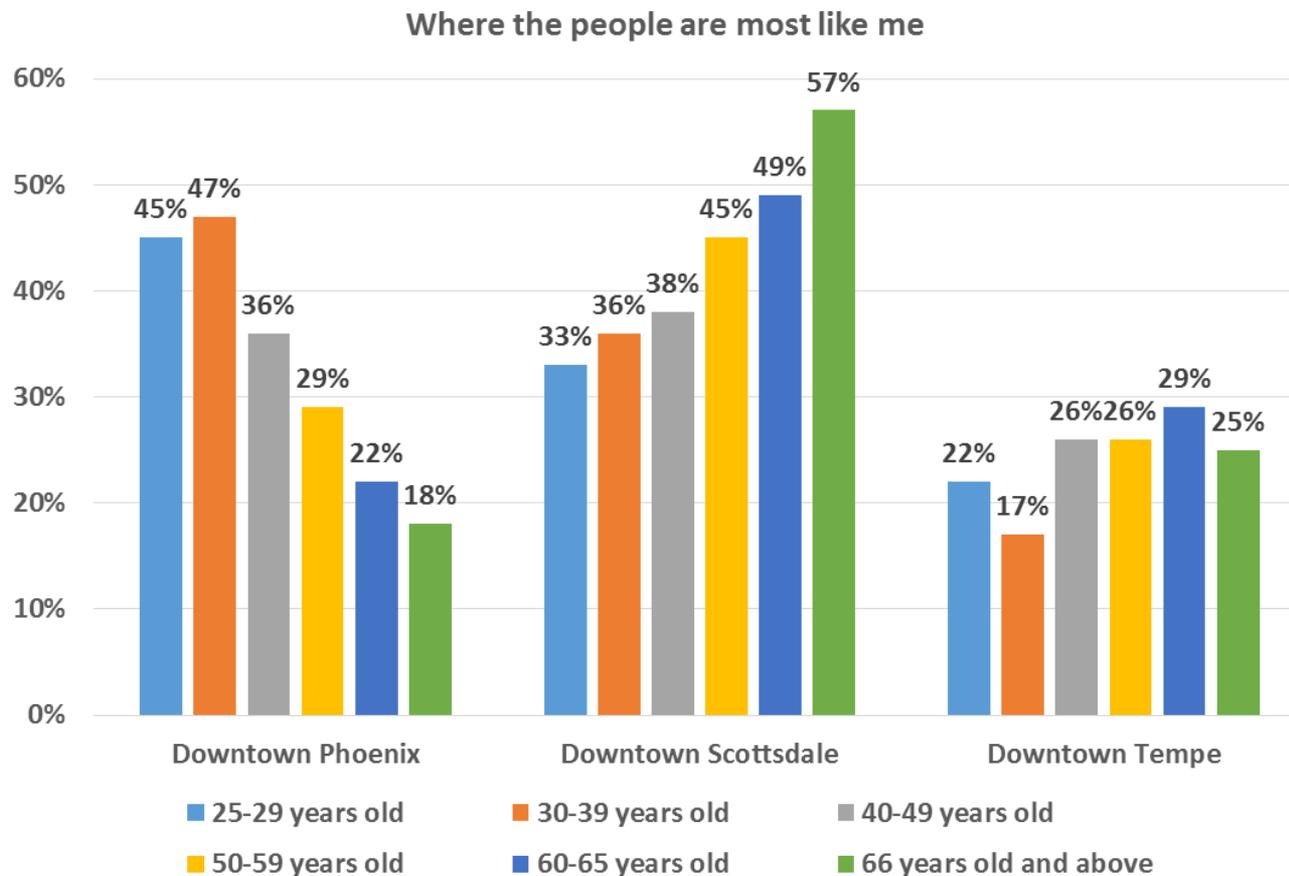
Those respondents who were 50 years and above felt that Downtown Scottsdale was the most appealing as a weekend destination for leisure activities.

Which of these three downtown areas appeals to you most as a weekend destination for leisure activities?



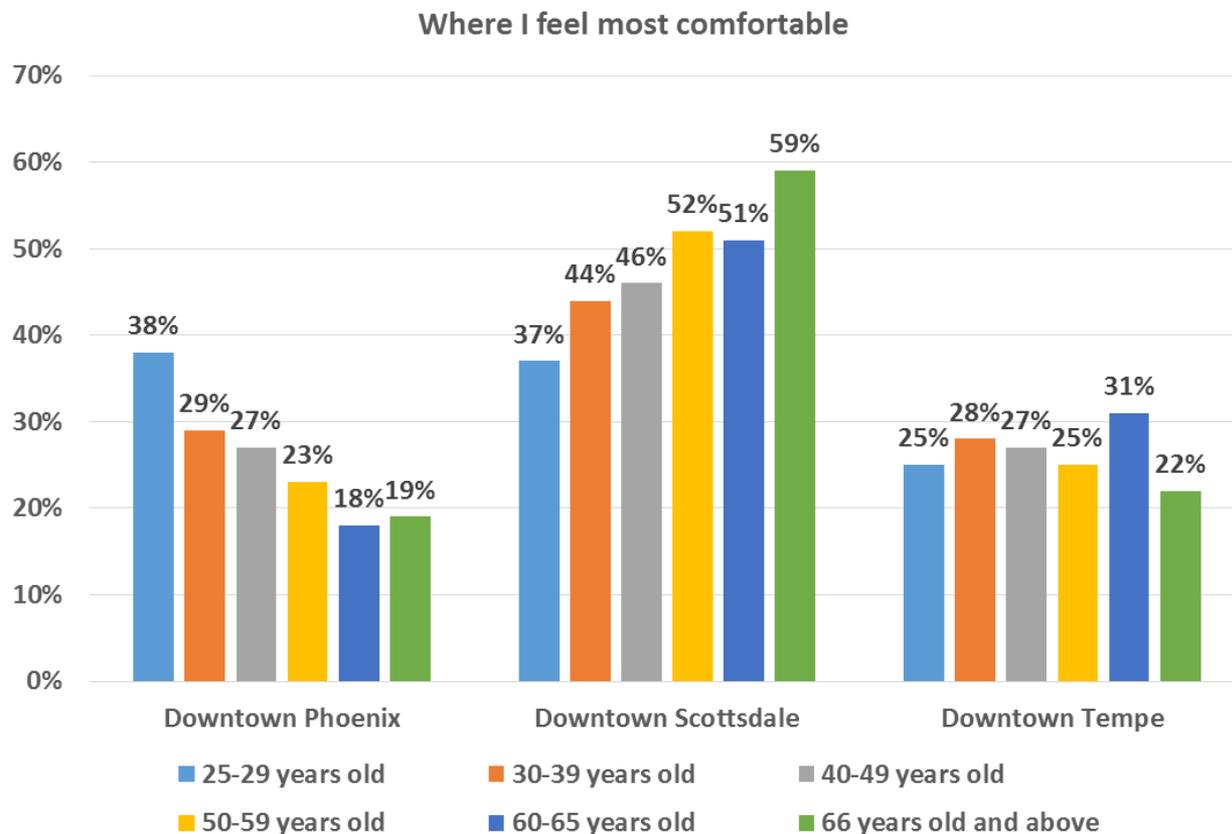
PEOPLE ARE MOST LIKE ME

As age increased, respondents were more likely to feel that people in Downtown Scottsdale are most like them.



FEEL MOST COMFORTABLE

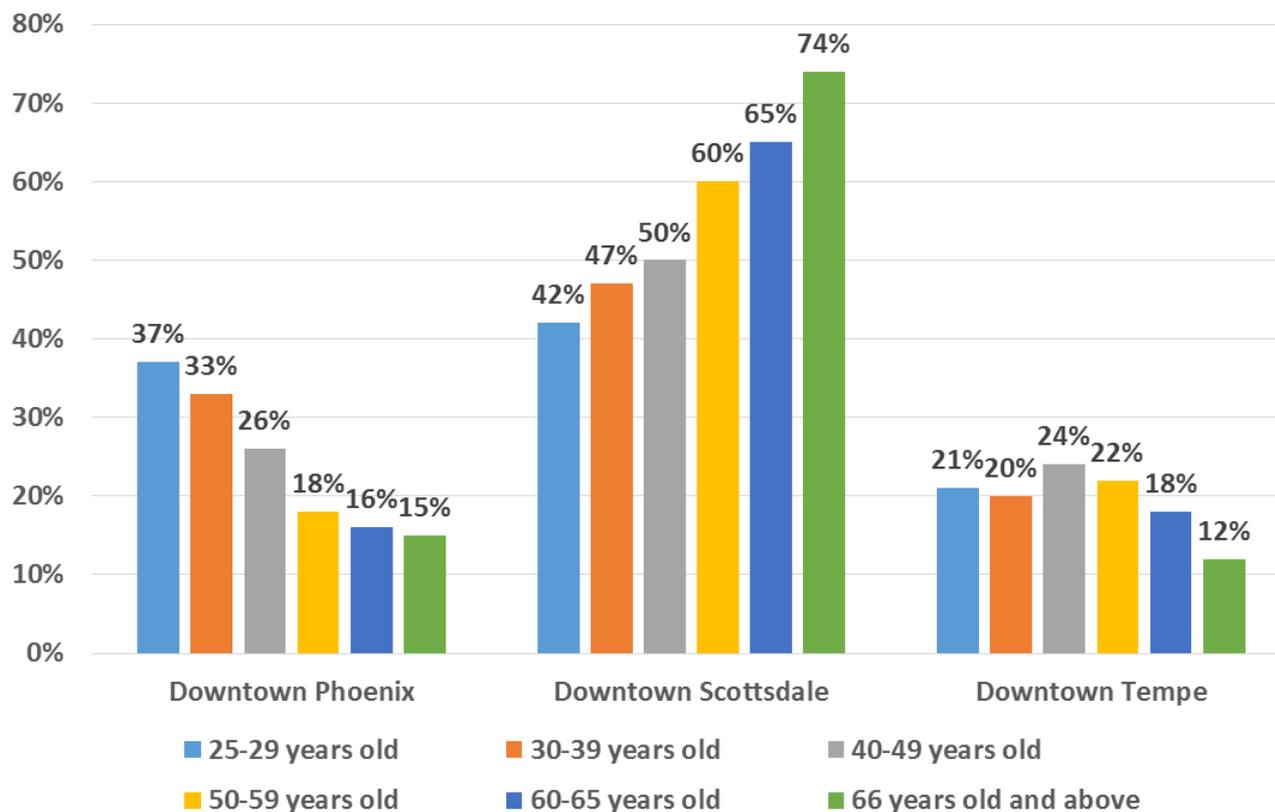
More than half of the respondents who were 50 years old and above felt most comfortable in Downtown Scottsdale.



ENJOY GOING TO RESTAURANTS

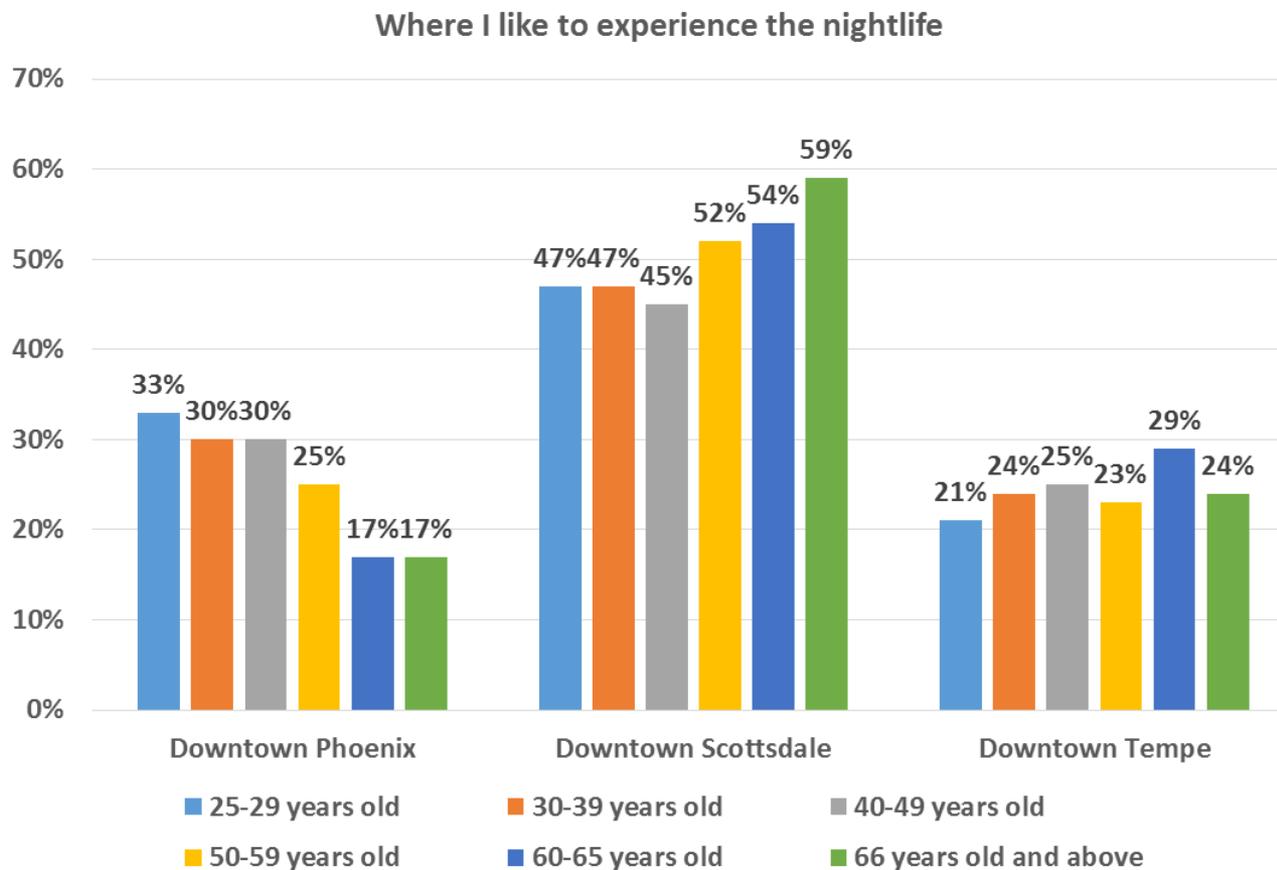
Across all age segments, Downtown Scottsdale was the most preferred downtown area to go to experience restaurants. This preference strengthened as the ages of the respondents increased.

Where I enjoy going to experience restaurants



LIKE TO EXPERIENCE NIGHTLIFE

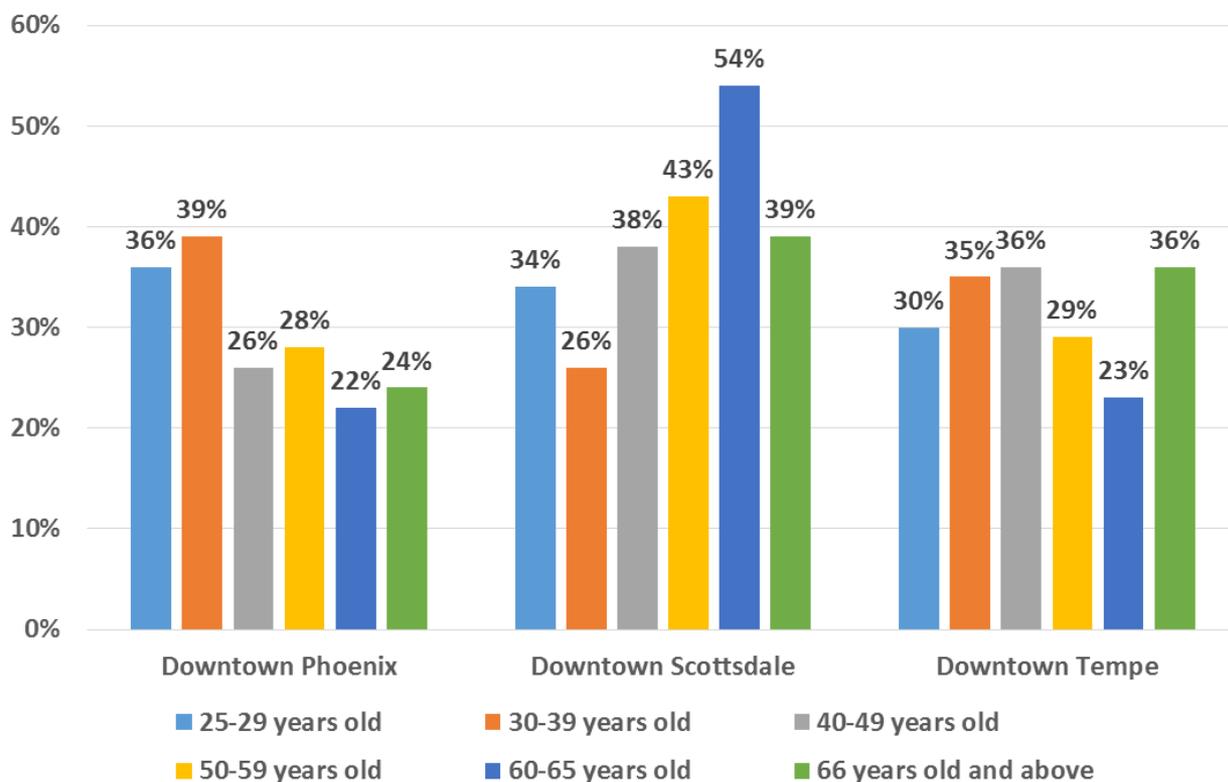
Downtown Scottsdale was where all age segments preferred to experience nightlife.



ENJOY OUTDOOR EVENTS AND FESTIVALS

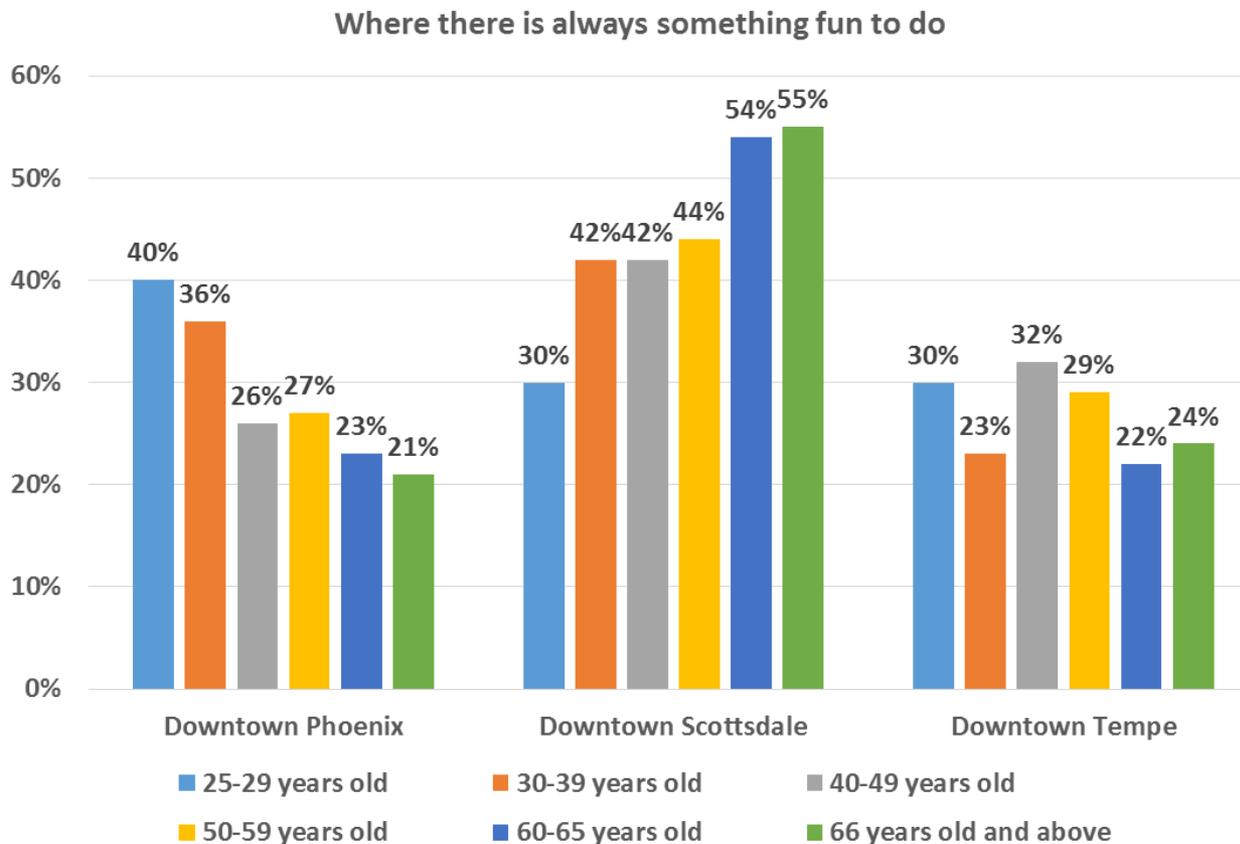
Respondents who were 60-65 years old (54%) were most likely to enjoy attending outdoor events or festivals in Downtown Scottsdale. Respondents between the ages of 25 and 39 years old shared a slight preference for experiencing these activities in Downtown Phoenix.

Where I enjoying attending outdoor events or festivals



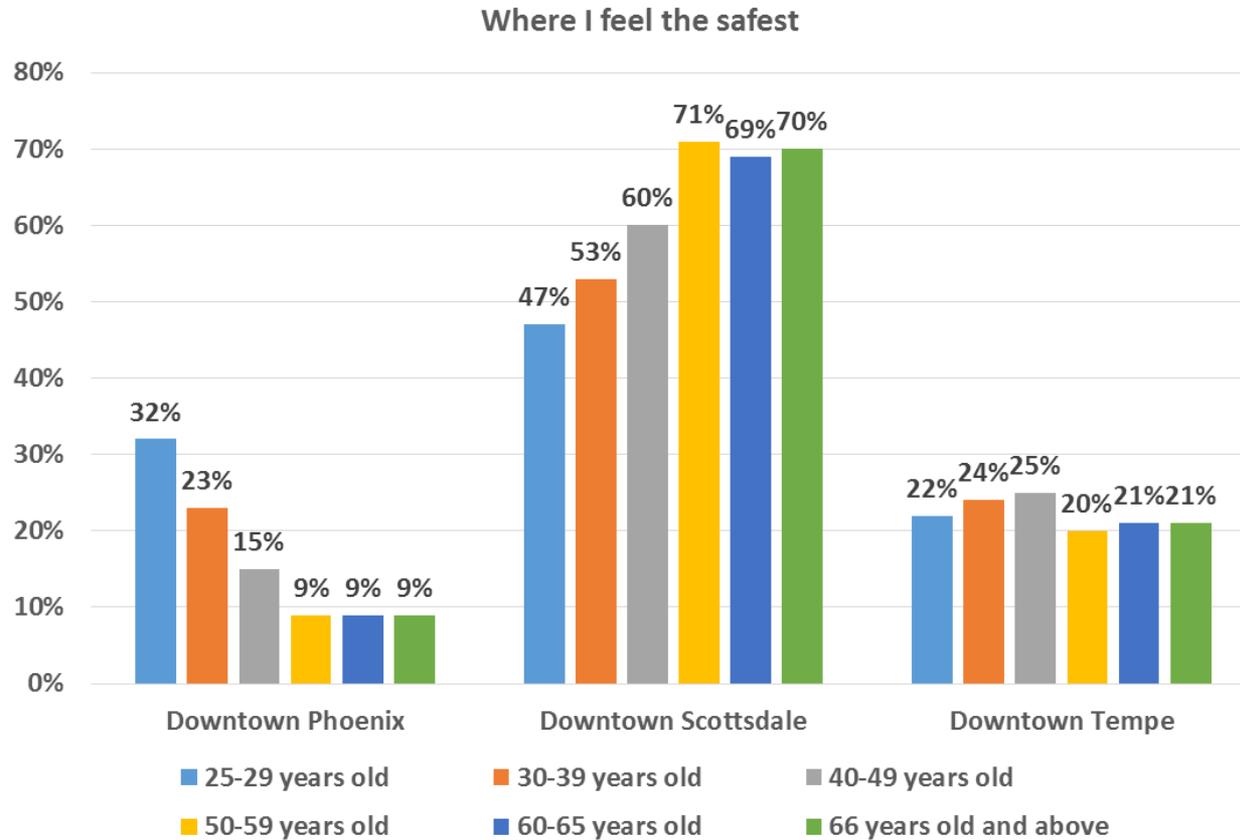
ALWAYS SOMETHING FUN TO DO

More than half of the respondents who were 60 years old and above felt that there is always something fun to do in Downtown Scottsdale.



WHERE I FEEL THE SAFEST

Across all age groups, Downtown Scottsdale was seen as where respondents feel the safest, with nearly seven out of ten respondents who were 50 years old and above expressing these sentiments.



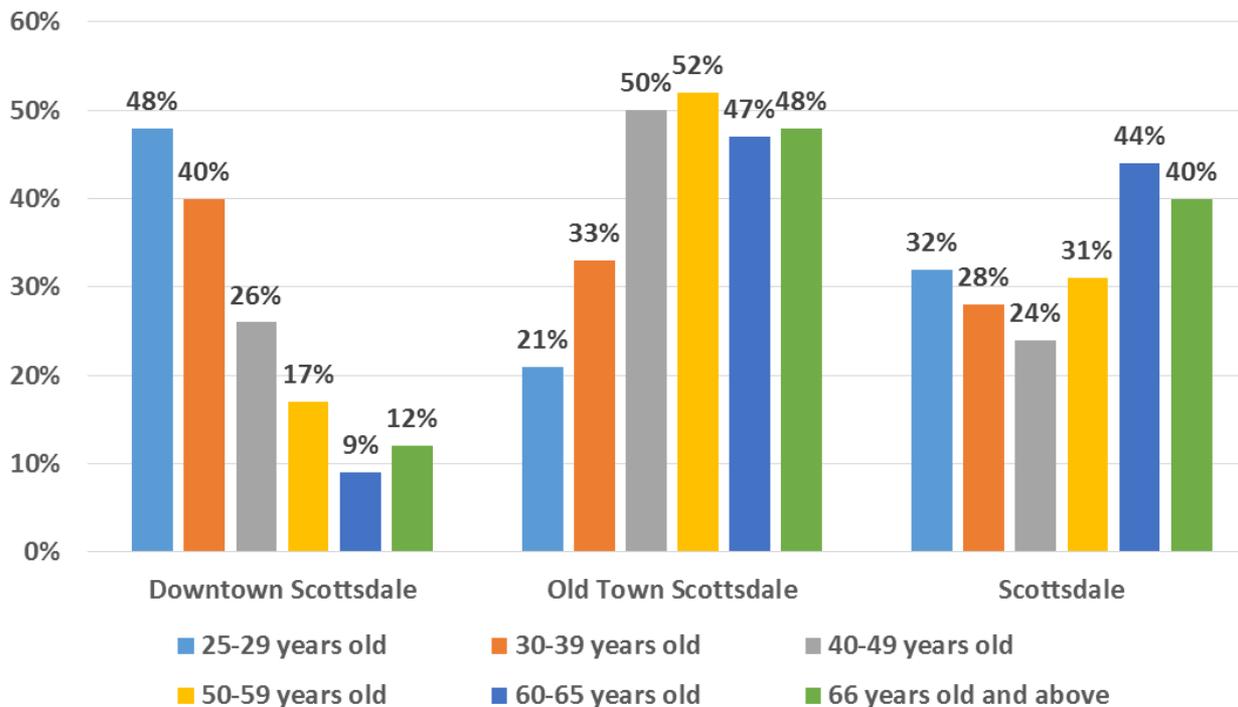
AREA DESCRIPTION

Residents across all age segments used ‘Downtown Scottsdale’, ‘Old Town Scottsdale’ and ‘Scottsdale’ to varying degrees to describe the same area.

Area Description Provided

The center of Scottsdale is located at the intersection of Indian School and Scottsdale Roads. It extends north to Chaparral Road and south to Earll Drive and it extends to Miller Road on the east and west to 68th Street.

If you were to tell a friend or family member that you are going to this area, which of the following descriptions would you use to tell them where you are headed?



STATEMENT AGREEMENT: MEAN SCORES

Downtown Scottsdale...



Mean scores based on a 1 to 10 scale where '1' is Completely Disagree and '10' is Completely Agree.

TRYING TO ATTRACT...

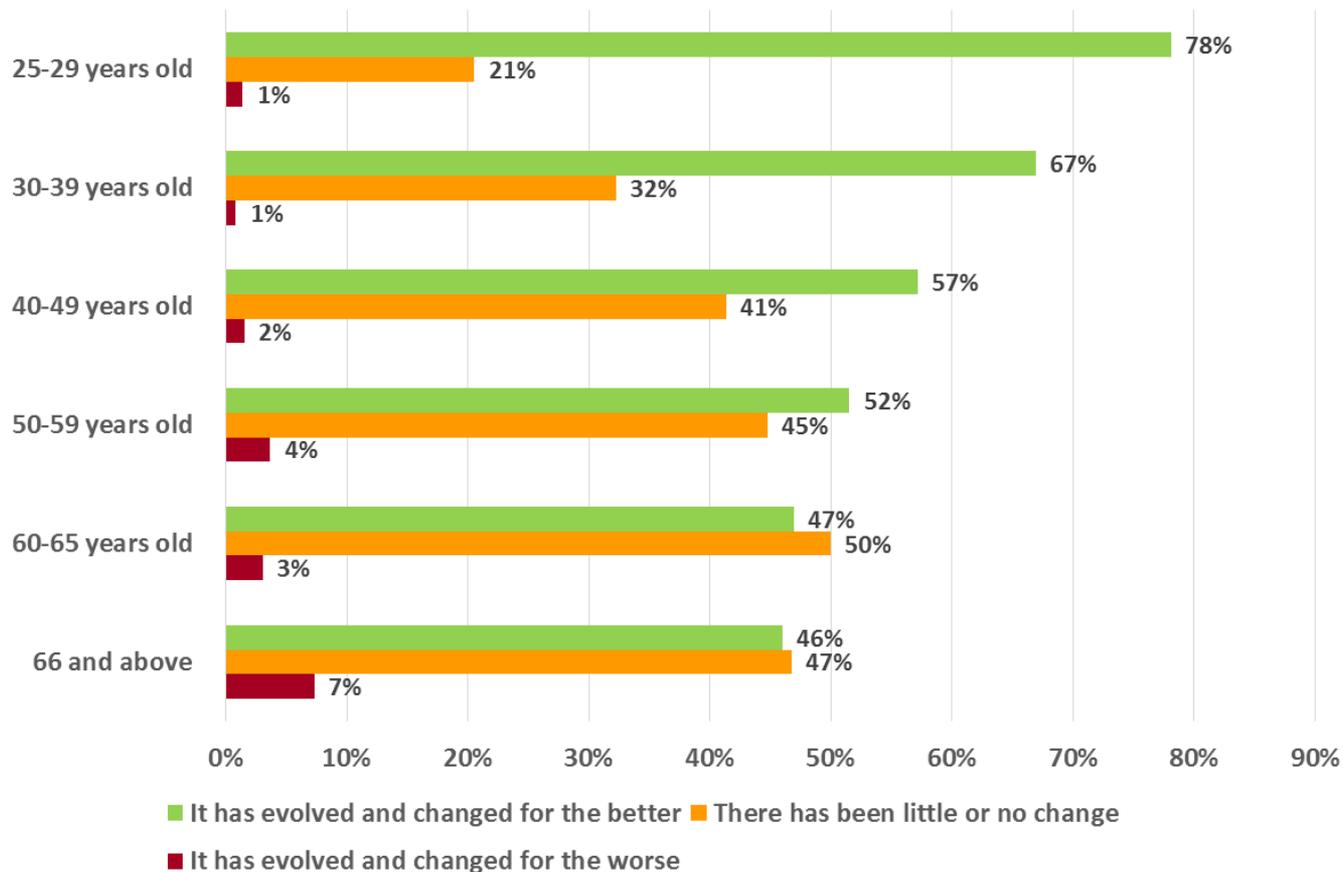
Respondents who were between the ages of 25 and 39 years of age were significantly more likely to think Downtown Scottsdale is trying to attract millennials, while those who were between 50 and 65 were more likely to feel that Baby Boomers were being targeted.

Based on your experiences, who do you think that Downtown Scottsdale is trying to attract?	25-29 years old	30-39 years old	40-49 years old	50-59 years old	60-65 years old	66 and above
Millennials (21-34 years of age)	88%	76%	63%	53%	47%	52%
GenX (35-49 years of age)	51%	66%	74%	69%	53%	69%
Baby Boomers (50-70 years of age)	19%	24%	32%	39%	43%	33%
Greatest Generation (more than 70 years of age)	8%	9%	14%	9%	13%	9%

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

DOWNTOWN SCOTTSDALE CHANGES

Which of the following best describes how you feel as to whether or not Downtown Scottsdale has evolved and changed over the past 3 years?



MOTIVATES VISIT TO DOWNTOWN SCOTTSDALE

More than 50% of respondents across all groups felt that the restaurants available in Downtown Scottsdale motivated them to go to there, while this was especially true for those over the age of 40.

What motivates you to go to Downtown Scottsdale?	25-29 years old	30-39 years old	40-49 years old	50-59 years old	60-65 years old	66 and above
Variety of restaurants	53%	57%	68%	74%	71%	78%
A safe environment	44%	48%	57%	54%	41%	47%
Plenty of nightlife options	42%	39%	34%	28%	17%	12%
A lively and energetic vibe	42%	42%	38%	31%	28%	20%
Variety of shops/shopping opportunities	40%	46%	47%	48%	52%	52%
Walkability/close proximity of shops, restaurants, bars, etc.	38%	42%	56%	57%	56%	61%
Major festivals and events	33%	38%	44%	44%	40%	31%
Diversity of people	30%	29%	20%	12%	8%	13%
Museums and theaters	26%	22%	20%	15%	15%	18%
Art galleries	22%	24%	21%	20%	17%	26%
Other (please specify)	0%	3%	3%	9%	4%	6%

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

BARRIERS TO GOING TO DOWNTOWN SCOTTSDALE

Across all age segments, parking was seen as a potential deterrent to visiting and engaging in activities in Downtown Scottsdale.

What, if anything, deters you from going to Downtown Scottsdale to experience leisure activities more often?	25-29 years old	30-39 years old	40-49 years old	50-59 years old	60-65 years old	66 and above
Not enough parking	30%	29%	37%	33%	37%	40%
Too crowded/too many people	23%	20%	23%	20%	16%	23%
Not enough diversity among people	12%	10%	5%	6%	1%	4%
Too expensive	27%	35%	33%	39%	37%	29%
Lack of appealing options for dining, shopping or entertainment	18%	8%	5%	2%	0%	2%
Nothing that I can't experience elsewhere in the Valley	4%	9%	6%	9%	3%	17%
Too touristy	11%	18%	12%	21%	17%	18%
Snooty and arrogant attitude of others	29%	22%	25%	17%	7%	15%
Unfriendly workers in the shops and restaurants	3%	7%	7%	2%	1%	1%
Not enough options for public transportation	16%	11%	8%	3%	1%	7%
Nothing deters me from going to Downtown Scottsdale	19%	20%	23%	21%	36%	28%
Other	1%	4%	4%	11%	10%	8%

Respondents were allowed to make multiple selections for this question; therefore, the percentages do not add up to 100%.

Social Media & Online Searches

Social Media & Online Searches



Instagram Hashtags

- 58,044 users used the hashtag #oldtownscottsdale
- 3,544 users used the hashtag #downtownscottsdale



Facebook Check-ins

- 143,574 users checked in to Old Town Scottsdale
- 2,096 users checked in to Downtown Scottsdale



Google Searches

- 18,100 average monthly searches for Old Town Scottsdale
- 2,400 average monthly searches for Downtown Scottsdale

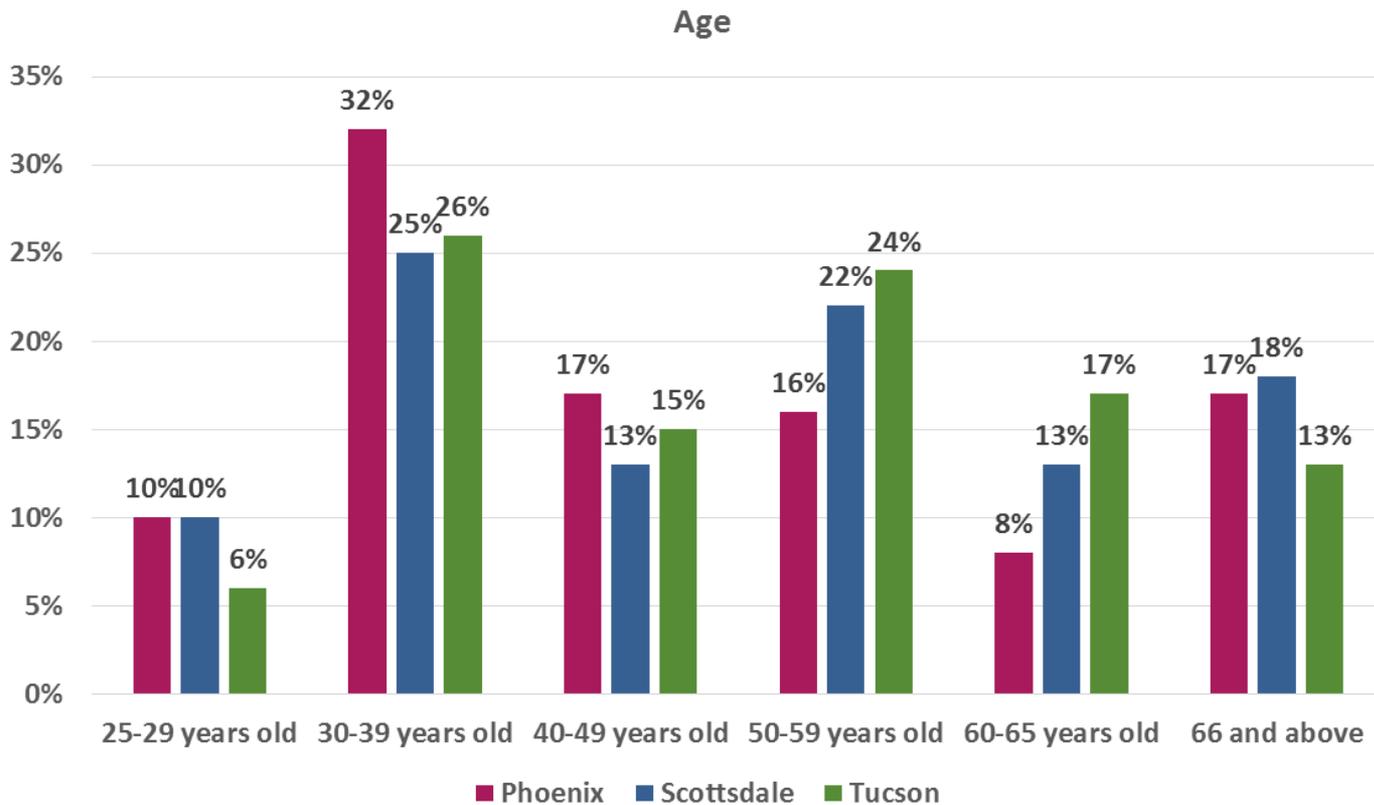
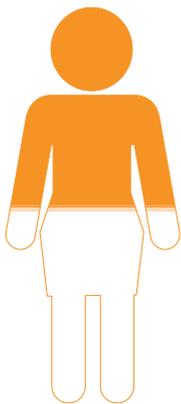
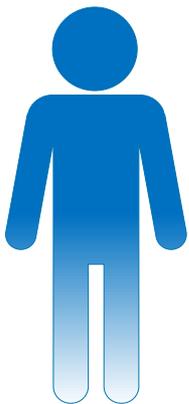
As of 8/15/17

Demographics

AGE & GENDER

49%

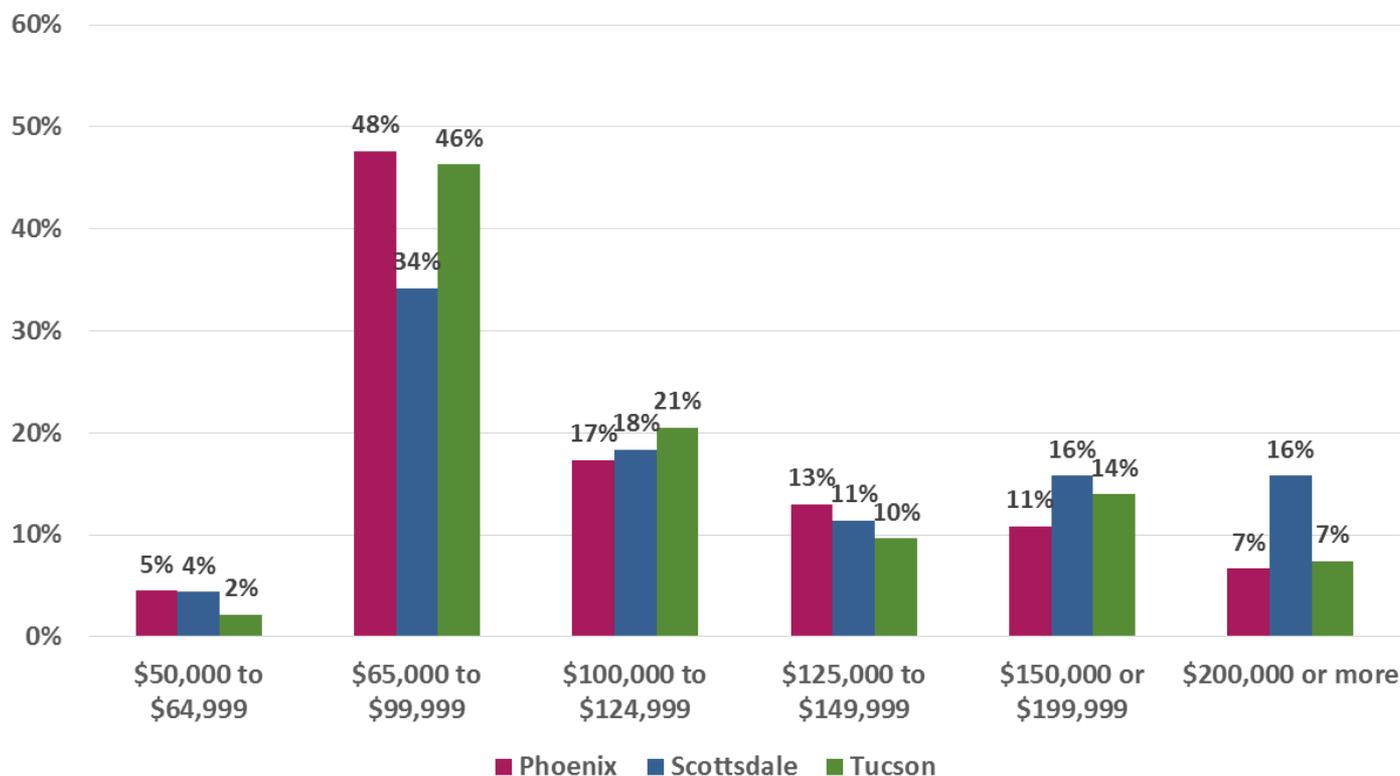
51%



Income

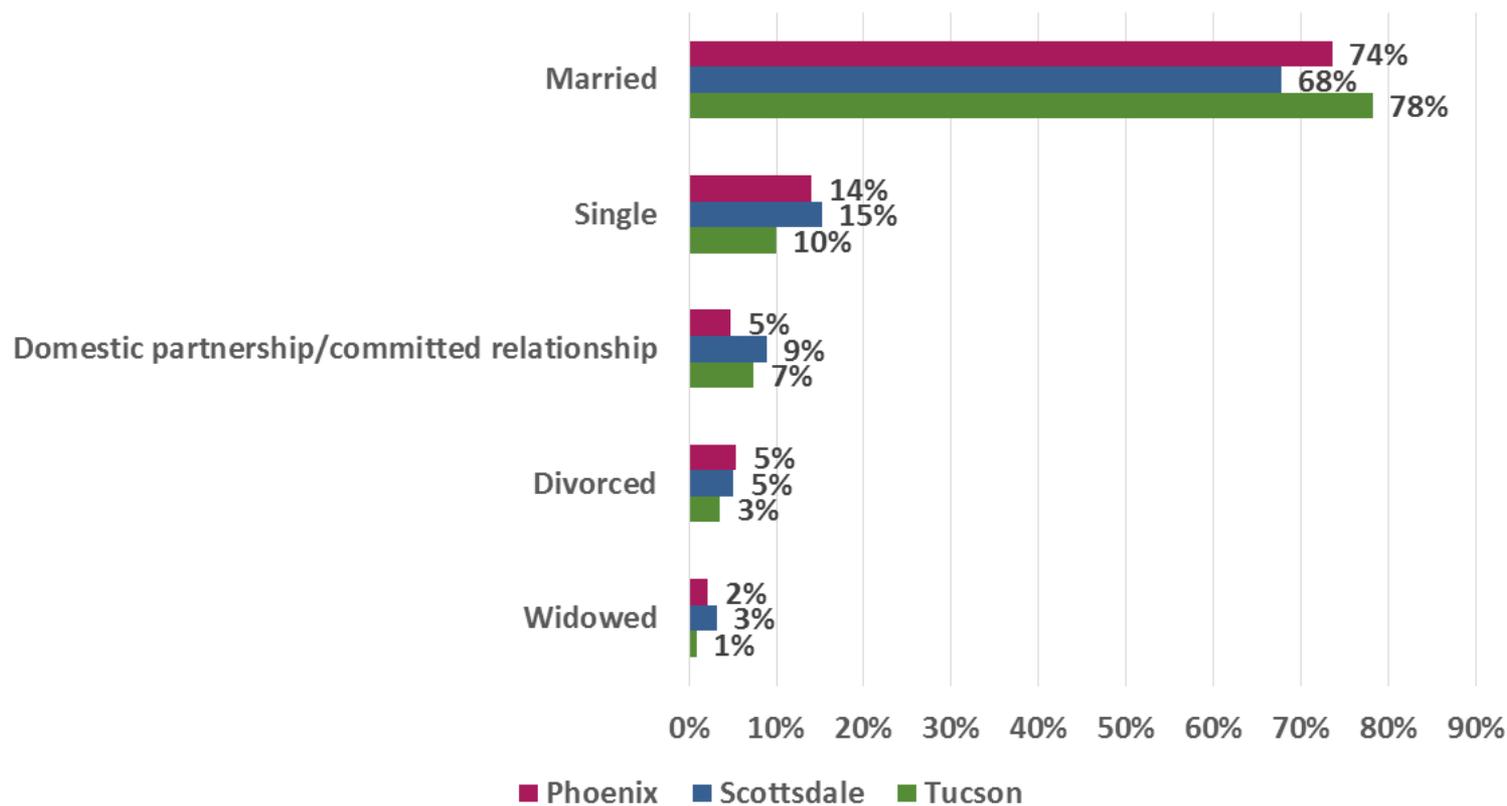
Phoenix (31%) and Tucson (31%) metro residents had a household income \$125,000 or more, while Scottsdale residents had the highest annual household incomes with 32% earning \$150,000 or more.

Which of the following best describes your total annual household income?



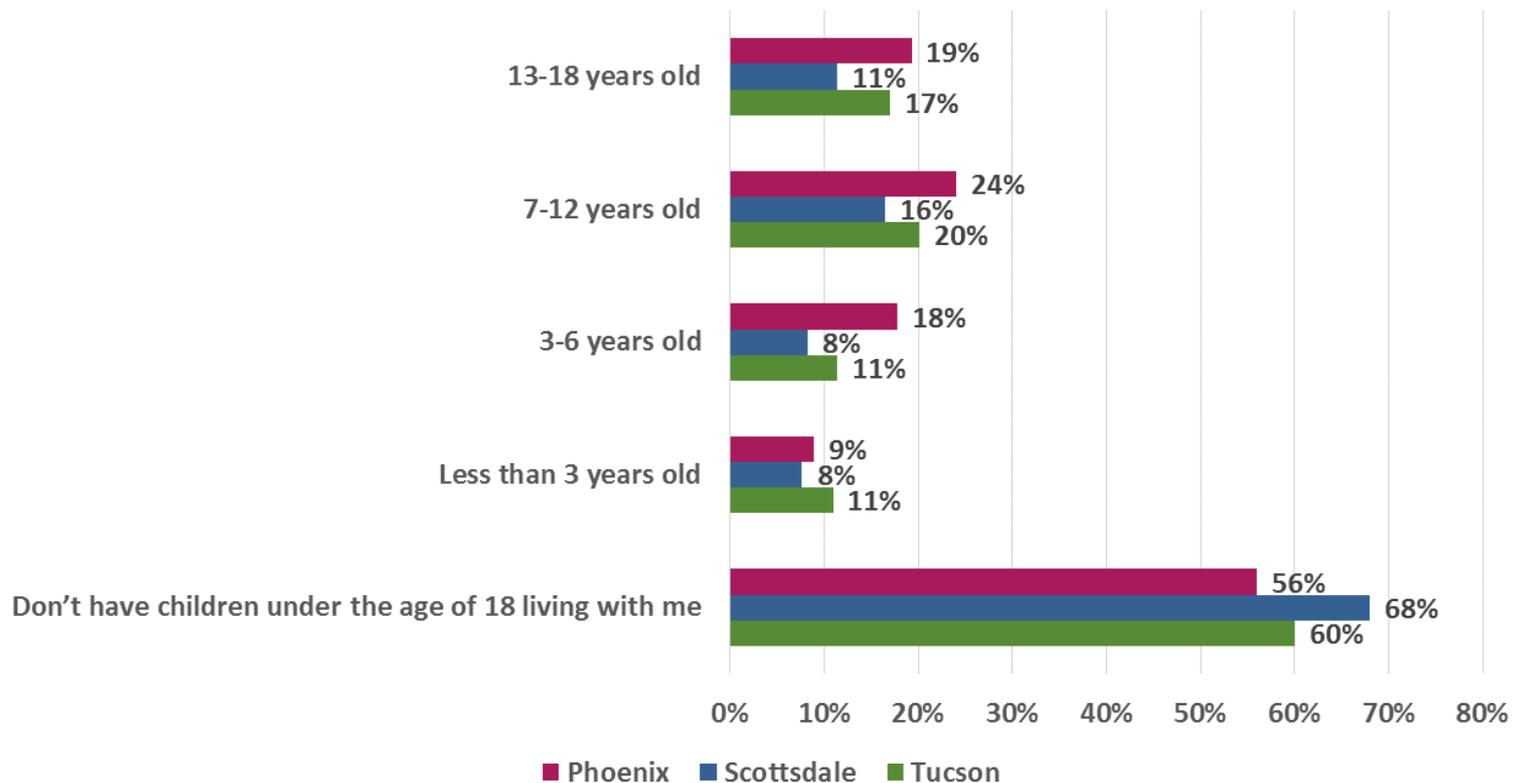
MARITAL STATUS

Marital Status



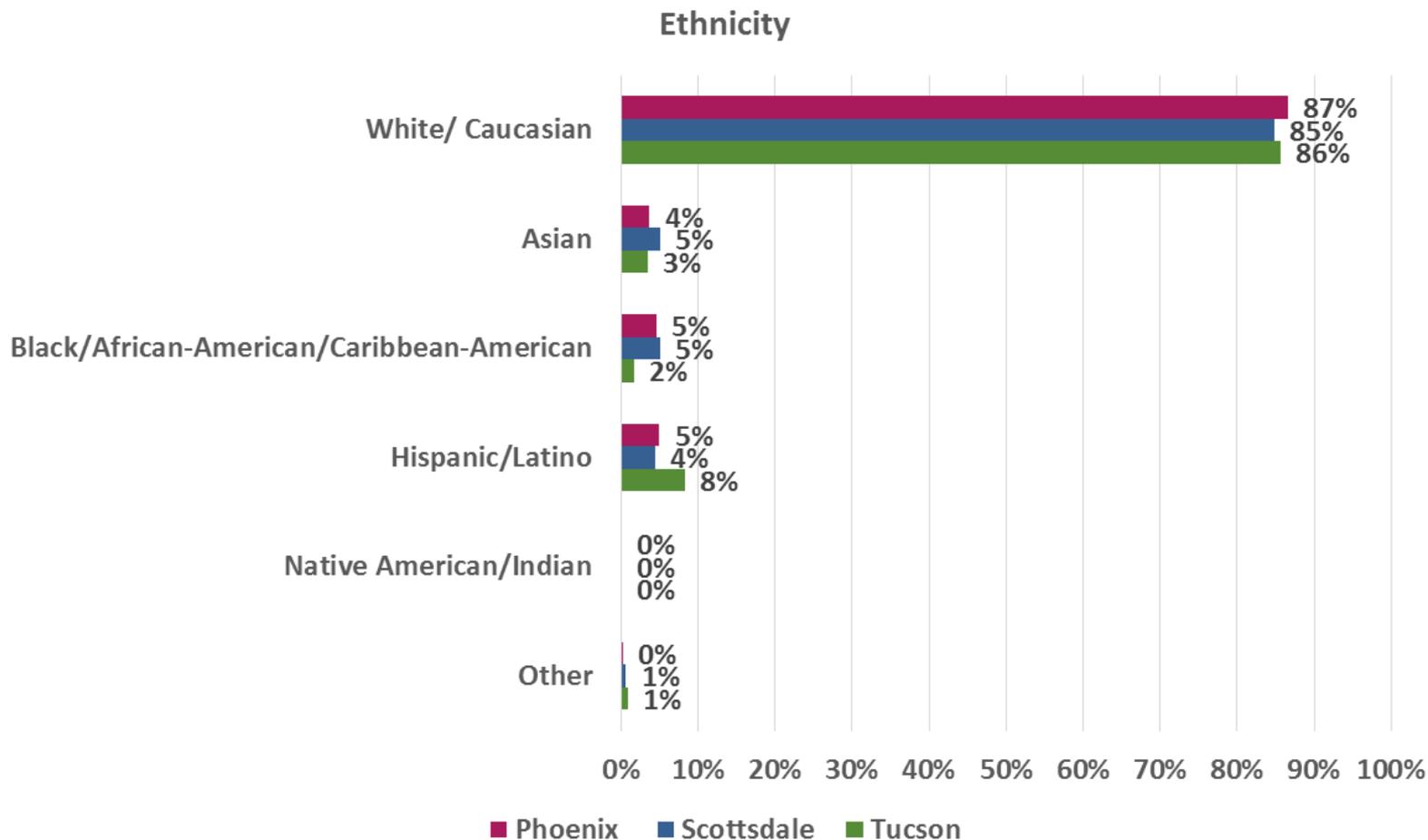
CHILDREN AT HOME

If you have children living with you 18 years old or younger, what are their ages?

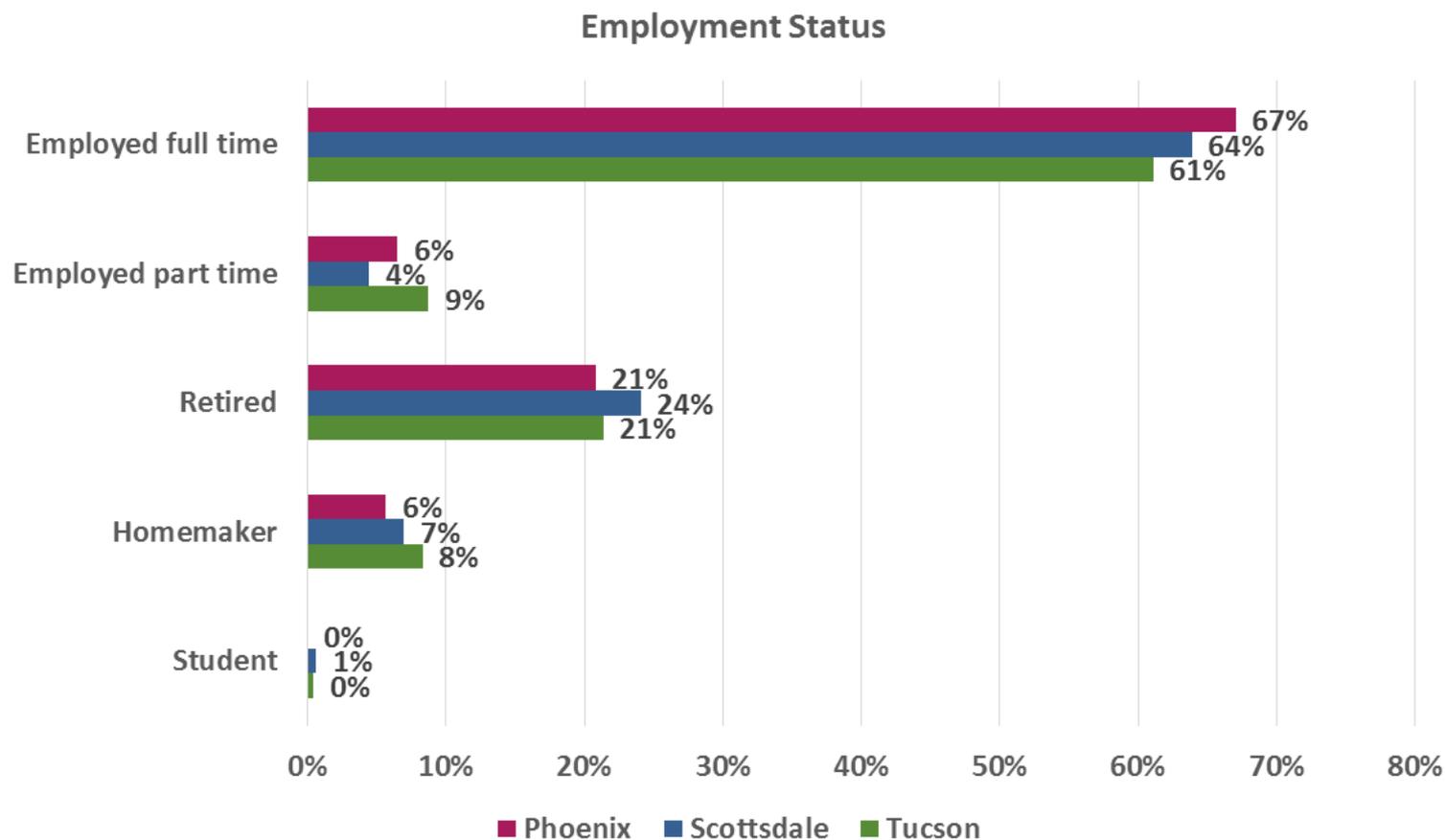


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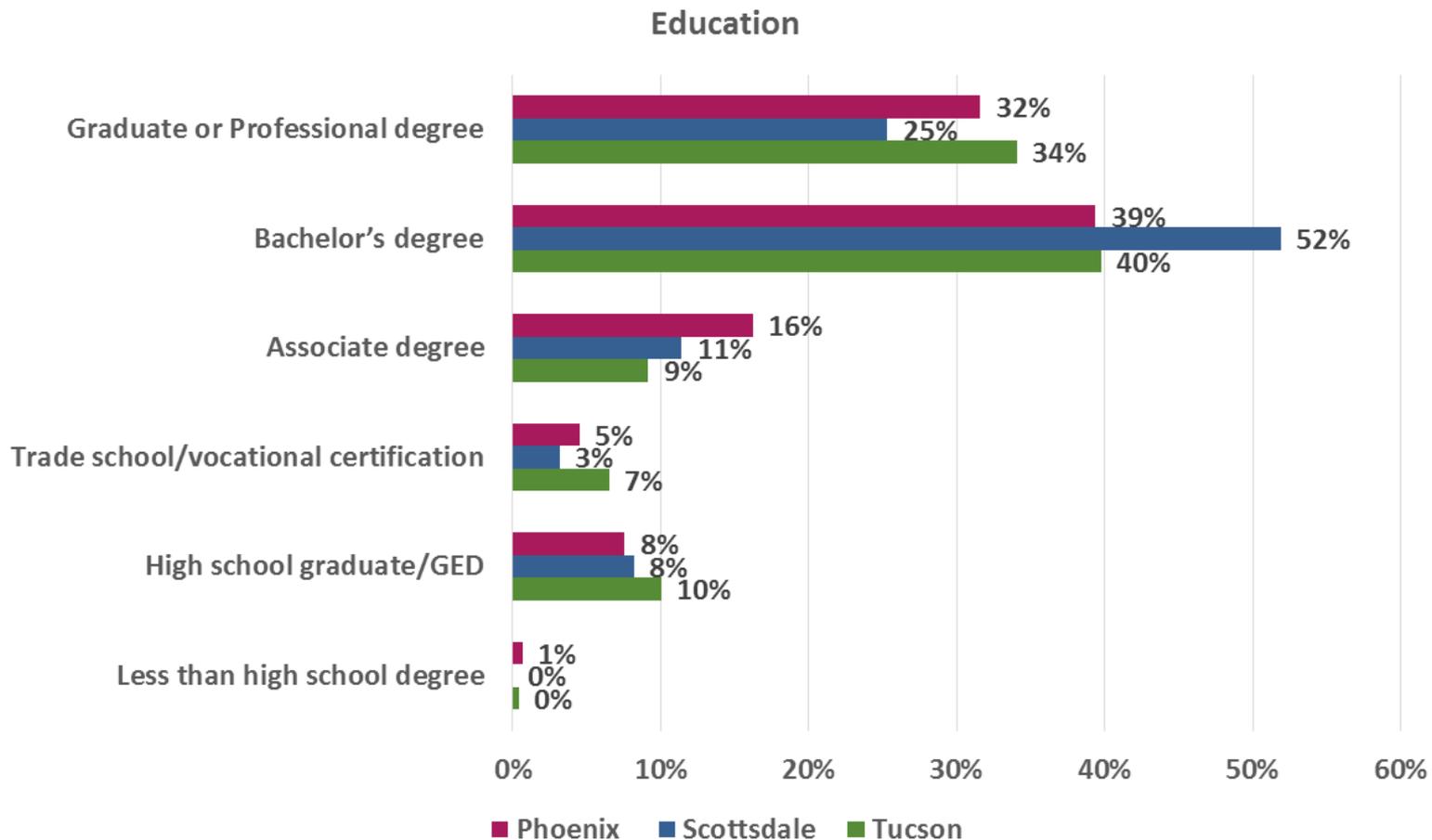
ETHNICITY



EMPLOYMENT STATUS



EDUCATION





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