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Pedestrian Count Summary

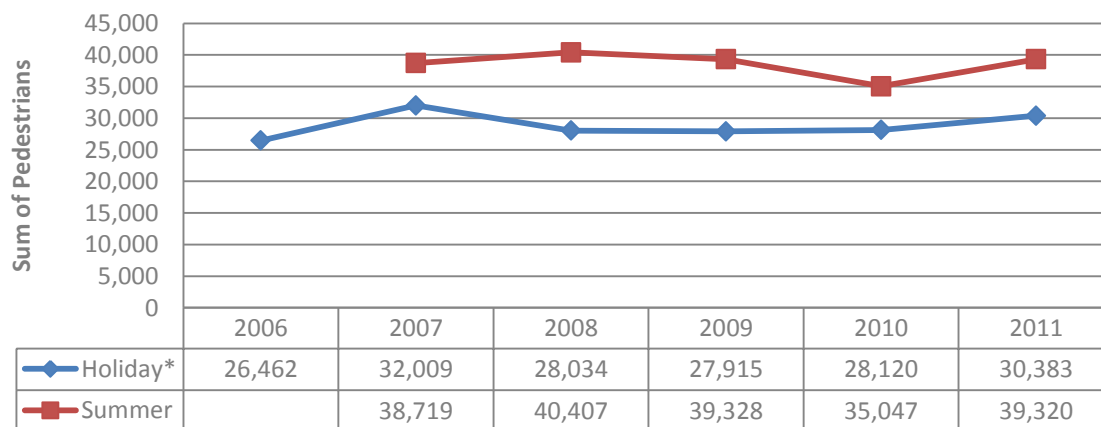
Holiday 2011 Update

Presently, two waves of pedestrian counts are conducted during the course of a calendar year: in the summer tourist season and during the winter holidays. Three shifts are conducted each count day: 7:30 to 9:00 am (morning rush), 11:30 to 1:00 pm (lunch) and 4:00 to 5:30 pm (evening rush). Data are currently gathered at seventeen geographically dispersed sites throughout Downtown Seattle. In 2010, the number of counts was reduced from three waves per year to two, eliminating a highly variable spring count.

Summary

For the holiday 2011 count, pedestrian traffic was counted at seventeen sites throughout Downtown Seattle. Nine of these sites have been regularly counted since pedestrian counts began in December of 2006. The following chart shows the aggregate counts for these sites to provide a sense of how overall "Downtown" traffic has changed in the past few years.

Pedestrian Traffic Trends: 9 Core Sites



* 2007 Holiday Count at 6th and Pine adjusted due to scheduling differences that year.

Findings from the 2011 holiday season count include the following:

- Retail Core sites continue to be the busiest sites regardless of season. Sixth & Pine was the busiest during the 2011 holiday count, followed by Fifth & Olive.
- Overall Downtown traffic is generally higher in the summer than during the holiday season.
- The site with the greatest increase from 2010 was 9th & Westlake in Denny Triangle.
- The site in with the most consistent annual increases since counts began is Westlake & Harrison in South Lake Union.
- Sites in tourist areas tend to see much lower traffic during the December wave compared to the August wave. Two sites at the waterfront (Alaskan & Seneca, Alaskan & Pike Street Hillclimb) saw the greatest difference between summer and holiday traffic.

Holiday 2010 versus Holiday 2011

An analysis of year-over-year variance showed that, on average, a normal “variance” due to daily fluctuations can account for 12 percent of changes at any given site. In 2011, four sites showed less than a twelve percent change: Broadway & Olive in Capitol Hill (11 percent increase), Fifth & Bell in Belltown, Seventh & Stewart in Denny Triangle (7 percent increase) and Fourth and Pine in the Retail Core (3 percent increase). Five sites saw an increase of more than 12 percent and five sites saw decreases of more than 12 percent. Four sites added in the past year lack historical data to allow for comparisons.

For those sites with more than a 12 percent year-over-year change, possible reasons are explored below:

Denny Triangle (9th & Westlake)

SE Corner

December 2010-2011: 44% increase

The Southeast corner by Whole Foods at Ninth & Westlake saw the greatest year over year increase. This site is near new retail shops, recently completed apartments and condominiums as well as several newly leased office towers. Much of the office space nearby has recently been leased by Amazon.com (in addition to the nearby Amazon.com campus in South Lake Union).

West Edge (2nd & University)

NE Corner

December 2010-2011: 26% increase

The West Edge site at Second & University experienced a 26 percent increase in 2011. In 2010, this site saw a similar increase (22 percent). This was after a large decrease in 2009 (25 percent). Over the past few years traffic at this site has likely been affected by the closure and reopening of the Metro bus tunnel and (more recently) significant decreases and increases in the occupancy of large nearby office towers, most notably the Russell Investments Center,

which was mostly vacant after Washington Mutual left the space and is now nearly 100 percent leased.

Retail Core (6th & Pine)

NE Corner

December 2010-2011: 24% increase

With a 24 percent increase over 2010, the 2011 holiday count at Sixth & Pine saw its highest level of traffic since holiday counts began in 2006. Previously this site had seen a fairly steady level of traffic during the December counts. One possible factor may be the day of the week the count was conducted. The 2011 count was conducted on a Friday, while the 2009 count was conducted on a Thursday.

South Lake Union (Westlake & Harrison)

SE Corner

December 2010-2011: 18% increase

With an 18 percent increase over December 2010, Westlake and Harrison in the South Lake Union Neighborhood has seen the steadiest increase each year in foot traffic since 2008. This neighborhood has seen an increase in office occupancy (most notably the addition of the new Amazon.com campus). In addition, several new eateries opened nearby in 2010 and 2011. Other factors likely influencing an increase in pedestrian volumes include new apartments nearby as well as increasing ridership on the South Lake Union Streetcar.

Pioneer Square (1st & Yesler)

SE Corner

December 2010-2011: 16% increase

The site at First & Yesler saw a 16 percent increase in pedestrian traffic over 2010. This is in contrast to the 2010 count, which saw a 15 percent decrease in volumes over the previous year. The Pioneer Square area lost street-level tenants between 2009 and 2010 but new tenants moving in led to one of the largest year-over-year increases in the number of street-level business among Downtown Seattle neighborhoods, bringing the level of street-level occupancy there back to 2009 levels.

Waterfront (Alaskan Way & Seneca)

West Side near crosswalk in front of Elliott's Oyster House

December 2010-2011: 15% decrease

Alaskan & Seneca saw a 15 percent decrease from 2010 and was 19 percent below the average for this site since counts began in 2006. While this count represented a decrease from the 2010 holiday count, it is also 9 percent higher than the count conducted in 2009. During the holidays this site can be affected by holiday events such as Argosy's holiday cruises.

Retail Core (7th & Pike)

SE Corner

December 2010-2011: 19% decrease

After two years of increased pedestrian traffic at this site (26 percent in 2009 and 14 percent in 2010), the site at Seventh & Pike saw a 19 percent year-over-year decrease. This level of fluctuation is not unusual for this site and is in the average range for December counts at this site since 2006 (the year counts started at this site).

International District (5th & Weller)

SE Corner

December 2010-2011: 19% decrease

The 5th & Weller site saw a 19 percent decrease both year-over-year. This was also 15 percent below the site average for the holiday season. This site has seen consistent decreases since 2009. One reason may be the loss of an anchor tenant (Amazon.com) in office buildings across the street.

First Hill (Madison & Minor)

SW Corner

December 2010-2011: 23% decrease

Pedestrian traffic at First Hill saw a 23 percent decrease in December 2010. Traffic patterns here may be affected by continued construction in the area, most recently an apartment tower currently under construction across the street. While this was a year-over-year decrease, the count was in the average range for this site for all December counts conducted since 2007 (the year counts started at this site).

Uptown (First Ave N & Mercer)

NE Corner

December 2010-2011: 71% decrease

In 2011, the First & Mercer site in Uptown saw the largest year-over-year decrease among all the sites counted. One possible factor is a high level of retail vacancy. The neighborhood saw the largest year-over-year decrease in the number of street level businesses. Another potential influence is nearby construction including construction at Seattle Center, apartment construction and a reconfiguration of Mercer Street several blocks to the east. The summer 2011 count saw a similar decrease from 2010 (67 percent). This site also tends to be among the most variable for pedestrian traffic counts.

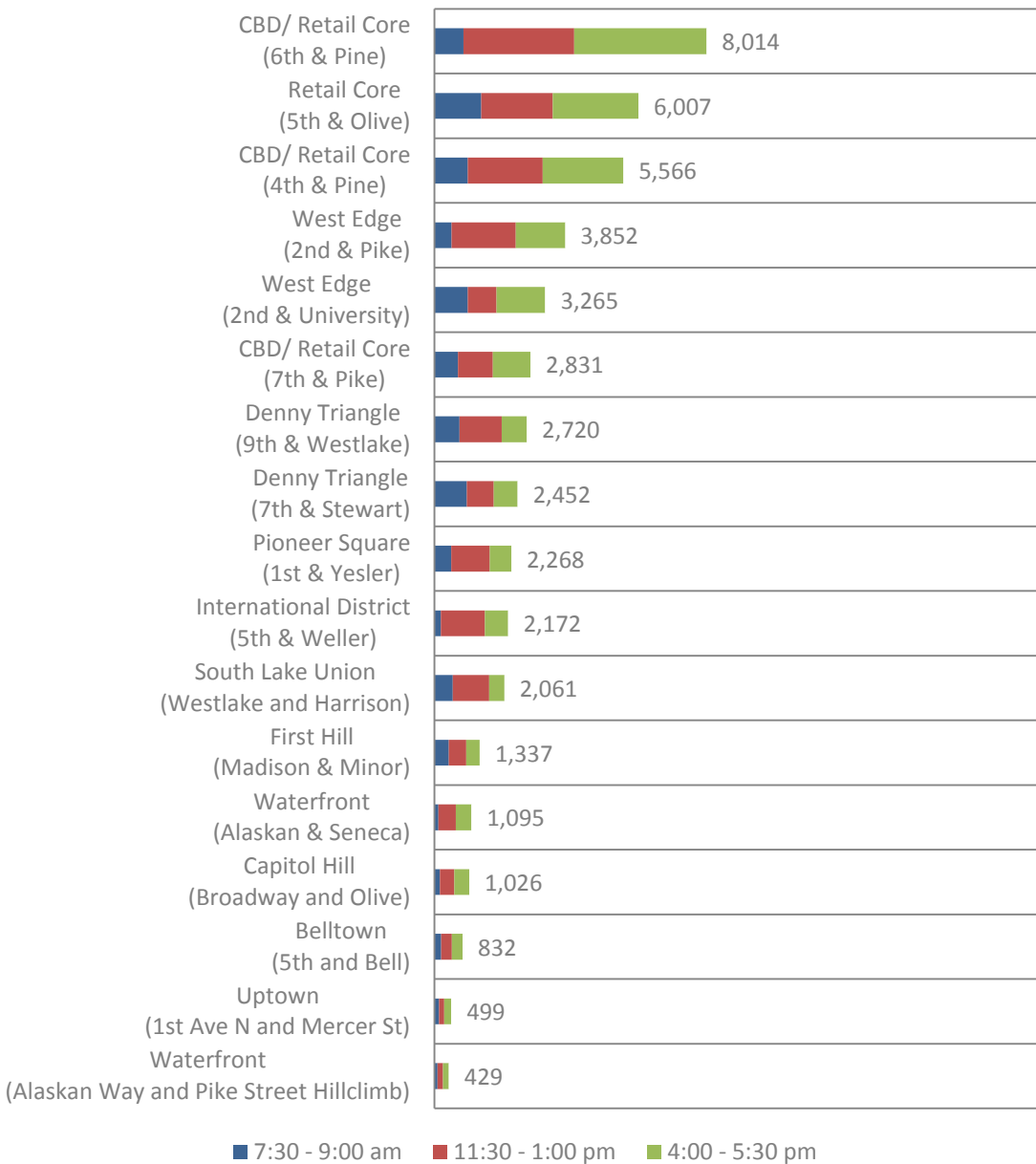
The table below shows year over year comparisons for each site for which they are available:

Pedestrian Counts: December 2010 vs. December 2011

Neighborhood (Intersection)	2010	2011	% Change
Denny Triangle (9th & Westlake)	1,895	2,720	44%
West Edge (2nd & University)	2,602	3,265	25%
CBD/ Retail Core (6th & Pine)	6,505	8,014	23%
South Lake Union (Westlake & Harrison)	1,741	2,061	18%
Pioneer Square (1st & Yesler)	1,963	2,268	16%
Capitol Hill (Broadway & Olive)	925	1,026	11%
Denny Triangle (7th & Stewart)	2,299	2,452	7%
CBD/ Retail Core (4th & Pine)	5,425	5,566	3%
Belltown (5th & Bell)	908	832	-8%
Waterfront (Alaskan & Seneca)	1,288	1,095	-15%
CBD/ Retail Core (7th & Pike)	3,472	2,831	-18%
International District (5th & Weller)	2,671	2,172	-19%
First Hill (Madison & Minor)	1,730	1,337	-23%
Uptown (1st Ave N & Mercer St)	1,732	499	-71%

The chart on the following page shows the 2011 data for all sites counted. The 2011 counts included three new sites: 5th and Olive, 2nd & Pike and Alaskan Way across the street from the base of the Pike Street Hillclimb.

2011 Holiday Pedestrian Counts - All Sites



Editor's Note

Collecting seasonal pedestrian traffic information over time provides a sense of the unique traffic patterns at each site and can signal changes in the area. However, any traffic count should also consider factors beyond the specific patterns at that location and time.

While explanations offered in this report may not account for all changes observed, historical activity suggests that pedestrian traffic is affected by factors such as office occupancy, construction, transit access, land use and resident density.

Counts are scheduled to match as closely as possible the conditions of previous years. Weather, the day of the week, the week of the count and level of event activity in an area can all affect pedestrian patterns. These factors are all taken into consideration when scheduling counts. Counts are not scheduled for days when large events such as conventions or sporting events may influence traffic patterns and overall volumes.

Another factor that cannot be ignored is normal day-to-day variability in pedestrian traffic volume. Sites are also selectively tested for variation in counts by stationing two different counters at the same time and place. Inter-counter differences have been less than 3%.

Who uses our data?

We regularly receive requests for pedestrian count data from real estate brokers, transportation planners, developers, property managers and others. Some individuals looking to site retail operations Downtown use the pedestrian count in concert with our Street Level database and Neighborhood Profiles to get a better sense of the area. We often receive calls from other Business Improvement Districts looking to create their own pedestrian count program. For questions regarding published data points, methodology or analysis, please contact Elliott Krivenko at 206-613-3255. In the past, we have been hired to conduct custom pedestrian counts. If you are interested in having us conduct customized counts for a fee please contact Jon Scholes at 206-613-3216.