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Seattle Center Economic and Conceptual Development Study Phase 1 Report and Executive Summary - Draft

Walt Disney Imagineering

Harrison Price Company

Peter Moy & Associates

Sharon J. Dalrymple

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DRAFT

**SEATTLE CENTER ECONOMIC AND
CONCEPTUAL DEVELOPMENT STUDY**

Phase I Report:

Local Market and Site Survey

Prepared for:

**CITY OF SEATTLE
March 1988**

Prepared by:

**WALT DISNEY IMAGINEERING AND
HARRISON PRICE COMPANY,
A Joint Venture,
in Association With
PETER MOY & ASSOCIATES and
SHARON J. DALRYMPLE**

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INTRODUCTION

Spread over 74 acres in the heart of Seattle, Washington is the unique conglomeration of cultural, public assembly, and entertainment facilities jointly known as Seattle Center. The complex, a legacy of the 1962 World's Fair, is the city's premier leisure destination as well as a major conference and exhibition venue. Though still a powerful force in the regional marketplace, it has not been immune to the ravages of time and intensive public use while, at the same time, newer and more glamorous rivals threaten to pare off a liberal slice of its attendance and event base. Symptomatic of the problems confronting Seattle Center is the relentless increase in building maintenance and administrative service requirements that has occurred over the past several years. Despite their cost in manpower and financial resources, these corrective measures have failed to compensate for the flaws inherent in the physical plant.

Recognizing that more concerted remedial action is imperative if the Center is to endure and prosper over the long term, the City of Seattle retained Walt Disney Imagineering, Inc. and Harrison Price Company, a Joint Venture, to prepare a master conceptual and economic development plan for Seattle Center. The six-month work program was initiated in December 1987 and encompassed a thorough examination of the physical condition, structural and use characteristics, and financial performance of Seattle Center buildings and grounds, both individually and collectively. It is emphasized that this new study is not simply an update of earlier planning work conducted over the past few years. Rather, the scope and depth of this work program transcends these earlier efforts and formulates, for the first time, a comprehensive master plan for the future growth and development of Seattle Center.

In accordance with the Mission Statement and Policy Guidelines adopted by the City Council relative to Seattle Center, the study had the following principal objectives:

1. To ascertain, by means of broad-based opinion surveys and interviews, the attitudes and aspirations of Seattle area residents toward the programs and facilities of Seattle Center;
2. To examine the physical and usage characteristics, current and potential, of all component facilities for the purpose of identifying marginal operations that should be adapted or eliminated;
3. To delineate a minimum of three alternative redevelopment programs based on the foregoing together with an analysis of the economic consequences of each option;
4. To recommend an optimum concept and physical plan, including appropriate phasing if indicated; and

5. To conduct an attendance and economic performance analysis of the recommended plan.

In addition to these objectives, the study was also guided by a number of broad directives and policies set forth by the Seattle City Council. The latter considerations establish that Seattle Center...

- ... is Seattle's Civic Center.
- ... shall be the focal point of the city for public art, education, culture, and recreation.
- ... shall be a major urban park.
- ... shall be an integral part of the public parks, entertainment, and recreation crescent from Lake Union to the waterfront to the International District.
- ... is for public enjoyment, including casual visitation to the site.
- ... shall be developed with the highest quality of urban design in a park-like setting, including resolution of transportation and parking problems.
- ... shall be a positive influence on land use.
- ... shall be financially stable.

The work program was divided into three phases: Phase I was comprised of a market and site survey establishing the needed data base; Phase II was addressed to the definition of concept alternatives, including pertinent tests of economic viability; Phase III was devoted to a detailed articulation of the recommended conceptual plan and its economic feasibility.

This report contains the findings of Phase I. Following this introduction, an Executive Summary highlights the primary findings and conclusions. Detailed commentary, together with all supporting documentation, are then presented in Parts A (local market survey) and B (site and use survey).

The study is a product of a joint venture between Walt Disney Imagineering, Inc. as conceptual designer, represented by Juliann Juras and Gordon Hoopes, and Harrison Price Company as economic consultant, represented by Harrison A. Price and Nicholas S. Winslow. In the capacity of subcontractors, Peter Moy and Associates was responsible for the local market survey, while Sharon J. Dalrymple provided analytical support to the site and use surveys.

The study team wishes to express its appreciation to the Seattle City Council, the staff of Seattle Center, and the many representatives of tenant organizations who generously contributed their time and data resources to the study program. Special gratitude is due Ewen C. Dingwall, retiring Director of Seattle Center and a one-man archive of the Center's history and evolution, for his indispensable tactical support. The assistance of Deputy Director Kathy Scanlan is also gratefully acknowledged.

EXECUTIVE SUMMARY

(work in progress)

Part A
LOCAL MARKET SURVEY

CHAPTER 1

INTRODUCTION

Seattle Center is a 74 acre urban park, which occupies the site of Seattle's 1962 World's Fair, Century 21. In 1966, the City of Seattle created a Seattle Center Department to manage operations and maintenance of the site. Since that time Seattle Center has evolved into an urban park that meets a variety of community needs. During the past several years, the City of Seattle has been re-examining the future of Seattle Center, and in 1985, the City Council reaffirmed Seattle Center's mission statement in Resolution 27323. In 1987, the City Council established policies and goals in Resolution 27606 to guide future development. Seattle Center's mission statement is the following:

"Seattle Center is visualized as an active and lively civic center, with primary emphasis on the arts, education and entertainment for the inhabitants of Seattle and the Pacific Northwest. Its plazas and buildings, both great and small, will accommodate a wide range of uses and activities which include festivals, theatrical performances, concerts, exhibitions, amusements, sports events, and general gatherings..."

LOCAL MARKET SURVEY OBJECTIVES

As part of the study's Phase I a local market survey was conducted to analyze the interests and concerns of the Seattle community and Puget Sound area visitors to Seattle Center. Through a market survey the City wanted to identify within the context of future development at Seattle Center any unique characteristics of current or potential visitor and regional markets. As specified in the agreement with Seattle Center, data was also collected regarding the number and origin of visitors, seasonality of visits, mode of transportation, length of stay, and accommodations used.

Given these parameters the local market survey was designed to do the following:

- profile Seattle Center visitors who have been there within the past year,

- identify and analyze who visited Seattle Center, why visitors came to Seattle Center, what events and facilities visitors attended at Seattle Center, and what happened on their trip at Seattle Center,
- identify and analyze what current perceptions are held about Seattle Center,
- identify and analyze perceptions about what future functions Seattle Center should have, and
- identify and analyze suggestions and opinions about improvements and potential changes to Seattle Center.

SURVEY METHODOLOGY

To accomplish the objectives of the survey and to work with existing users and tenants of Seattle Center, the primary approaches used to gather information regarding Seattle Center visitors were the following.

- A telephone survey of over 800 residents in the City of Seattle, King County excluding Seattle, Snohomish County, Kitsap County, and Pierce County.
- A review of past surveys done by Seattle Center, user groups, Seattle Center tenants, and other organizations and institutions.
- A review of data collected by tourist and convention organizations regarding the characteristics of those markets.

We would like to thank all the participating organizations, agencies, and individuals for their cooperation, information, and assistance in gathering data for this study.

Telephone Survey Methodology

A telephone survey of 824 residents living in the Puget Sound area (King, Snohomish, Kitsap, and Pierce Counties) was conducted between January 29 and February 9, 1988 by Peter Moy & Associates.

Questionnaire Development

A questionnaire was developed based upon the survey objectives and discussions with Seattle Center officials, tenants, and several user

organizations. Various ideas were discussed and identified with these groups, especially those that involved potential changes or improvements to Seattle Center. Focus groups were also used to assist in developing the questionnaire. Appendix A-I contains a copy of the questionnaire used in the interviews. A pre-test of the questionnaire and fielding procedures was conducted following the development of the questionnaire. The pre-test results were used to revise the introduction and various questions to increase respondent cooperation and decrease non-responsiveness. All questions in a series were rotated to reduce response order effects.

Calling Procedures

A minimum of four attempts was made at different times on different days to reach qualified respondents. Most calls were on weekday evenings and during the day over the weekend. Qualified respondents were randomly selected from all household members using a procedure based on the number of women 16 years or older in the household compared to the total number of household members 16 years or older. This procedure assured the inclusion of hard to reach members within households. All males and females in the household aged 16 and older had the same likelihood of becoming the designated respondent.

Interviewers

Interviewers were trained extensively by project supervisors on general interviewing techniques and procedures. In addition, interviewers received a briefing on the questions and on computer data entry procedures. Practice interviews were conducted and reviewed before actual interviewing began. Project staff supervisors supervised interviewers on all shifts. A minimum of 10% of all interviews were verified by contacting respondents who had participated in the survey. All interviewers conducted interviews in all geographic areas to reduce interviewer bias.

Coding

Coding was completed by interviewers who demonstrated high quality in probing and clarifying open ended responses. The staff was briefed on the goals and details of the coding schemes developed from a listing of open ended responses obtained from the first 100 surveys. All responses not coded easily, based on the original code sheets, were reviewed, and codes were determined by project supervisors. A minimum of 10% of the coded responses were verified.

Sampling Procedures

The sampling frame consisted of all households with telephones in King, Snohomish, Kitsap, and Pierce Counties. A stratified random sampling procedure was employed. Prefixes were selected proportional to residential lines within each county. Working digits within each prefix were determined and the last two digits were randomly assigned. This two stage random digit procedure ensured the inclusion of households with unpublished or unlisted telephone numbers. It is important to include unpublished and unlisted numbers in the sample because they comprise as much as one third of all telephone households in some areas.

Quotas were established for each geographical area to ensure a base sufficiently large to examine results by county:

n margin of error*

| | | | |
|------------|-----|---|-----|
| Seattle | 250 | + | 3.2 |
| Other King | 250 | + | 3.2 |
| Kitsap | 100 | + | 5.0 |
| Pierce | 100 | + | 5.0 |
| Snohomish | 100 | + | 5.0 |

* Probable deviation (plus or minus) of results due to size of sample. For a sample of 250, there is a 95% probability that any given response will be no more than 3.2% different than that of the population as a whole.

Findings cross tabulated by county are based on the unweighted data. All other data are reported based on weightings of households in the Puget Sound area proportional to each county's number of households. Weightings were determined using April 1, 1987 estimates of the number of households furnished by the Washington State Office of Financial Management.

This weighting produced the following number of households by geographical area:

| | n | % of total |
|------------|------------|------------|
| Seattle | 191 | 23% |
| Other King | 284 | 35% |
| Kitsap | 55 | 7% |
| Pierce | 168 | 20% |
| Snohomish | <u>127</u> | <u>15%</u> |
| Total | 824 | 100% |

Details concerning table presentation, fielding statistics, comparison of the sample to census data, and margin of error can be found in the Appendices A-II and A-III.

DISCUSSION OF FINDINGS

The following chapters discuss our survey findings. We have identified those findings which were desired by Seattle Center and those which we believe provide Seattle Center with some insight into the behavior patterns and thoughts of Puget Sound area residents regarding Seattle Center. In our discussion of past surveys conducted by Seattle Center and other organizations, we have summarized the findings that relate to issues in this report. It must also be remembered that survey research cannot predict behavior or opinion in the future. While great care and the most sophisticated techniques available were employed in the design, implementation, and analysis of this research, the results reported here can be interpreted only as representing the views of these respondents at the time they were interviewed.

This report provides an overview of the data collected during our survey. Because Phase II involves more detailed work on conceptual alternatives and economic feasibility, additional analysis and data not presented in this report may be presented at that time.

CHAPTER 2

RESPONDENT PROFILES

As discussed in Chapter 1 we interviewed over 800 residents living in the Puget Sound area in King, Snohomish, Kitsap, and Pierce counties. Our participants generally reflected the population in the area. The following are the characteristics of the sample.

GENDER

Interviewing quotas were controlled so that half of the respondents were male and half were female.

AGE

Chart 1 shows the age profile of the 820 respondents:

- 5% were from 16 to 20 years of age;
- 36% were from 21 to 34;
- 25% were from 35 to 44;
- 25% were from 45 to 64; and
- 8% were 65 years and older.

RACIAL AND ETHNIC BACKGROUND

As shown in **Chart 2**, eighty-nine percent (89%) described themselves as white, while 9% gave another racial or ethnic designation:

- 4% Asian/Pacific Islander;
- 2% Black;
- 1% Native American/Indian;
- Less than 1% Hispanic; and
- 2% named some other group.

The proportion of minority respondents was highest in Seattle and in Pierce County.

FAMILY STATUS

When asked which type of family structure best described them, almost half (46%) said they were part of a couple with children (**See Chart 3**). As for the rest:

CHART 1

AGE

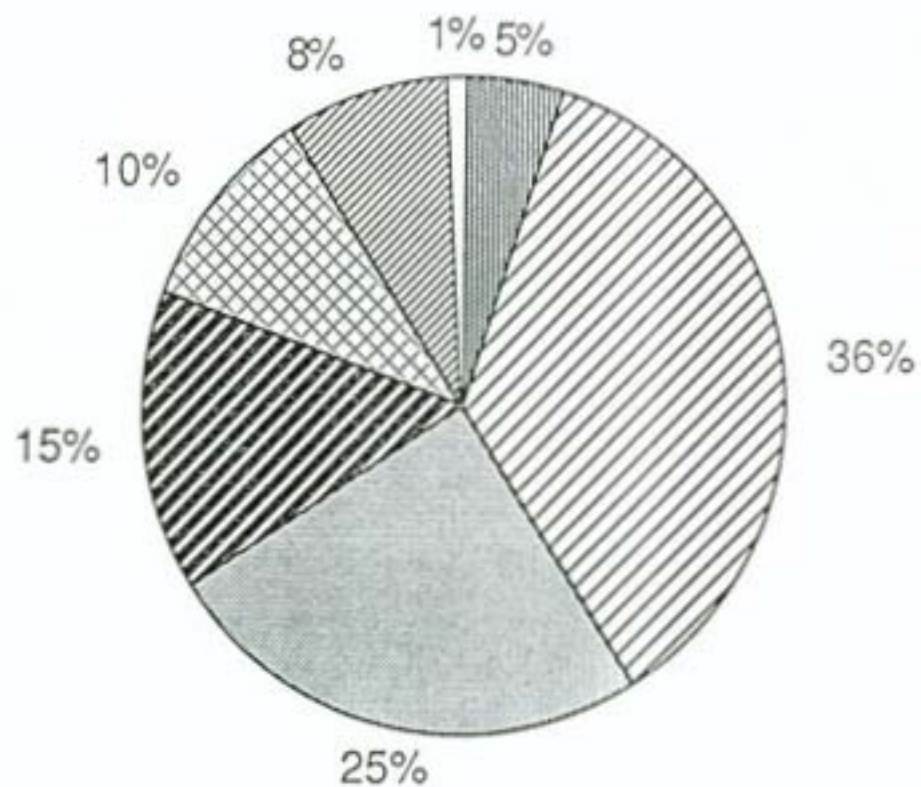
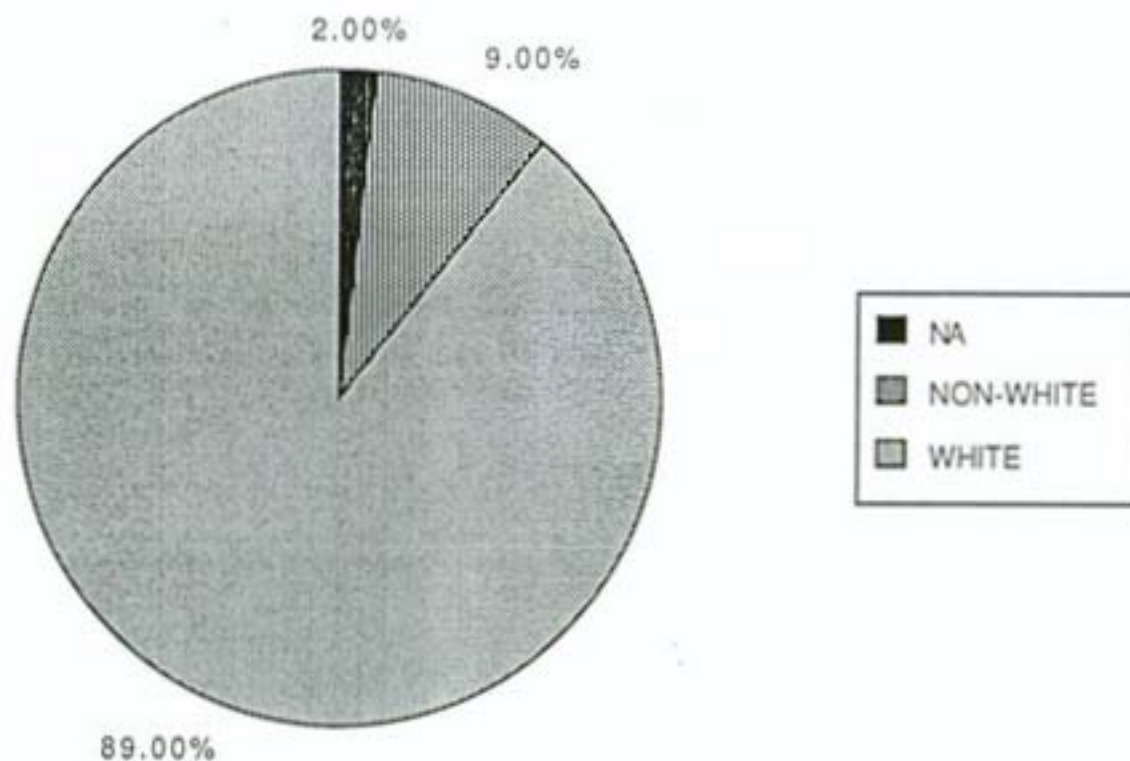


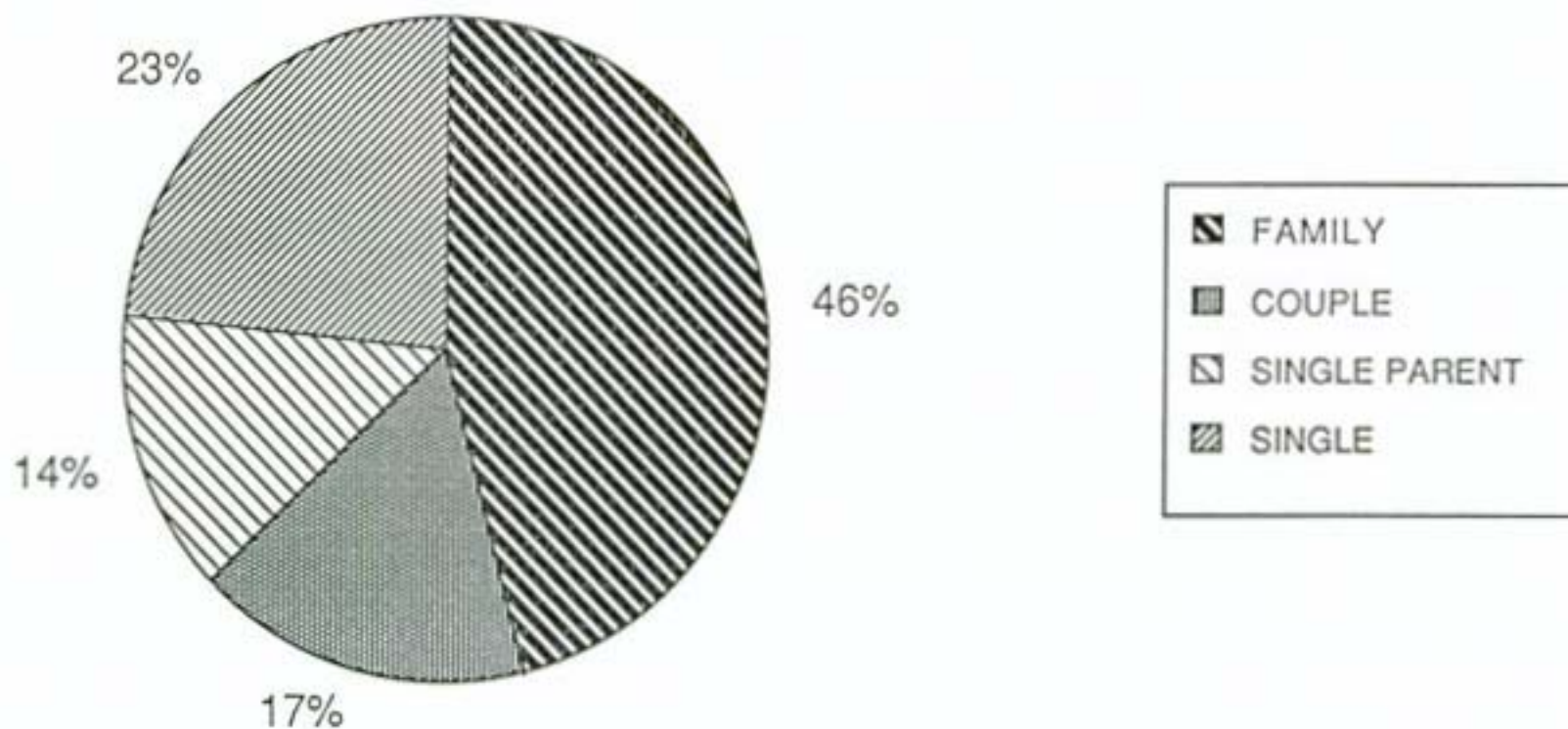
CHART 2

RACE OF RESPONDENT



A-8

CHART 3
FAMILY STATUS



A-9

- 23% of the total were single;
- 17% were in a couple; and
- 14% were single parents.

Seattle had the highest proportion of single respondents (32%) and the lowest proportion of couples with children (36%). On the other extreme, 54% of respondents from Snohomish County had families while only 16% of Snohomish County respondents were single. **Chart 4** shows the profile of households with children living at home.

- About (24%) lived in households with children under 13 years old age; and
- 10% lived with teenagers (13 to 19 years old).

RESIDENCE

One goal of the interviewing was to survey enough people in each county to assure reasonably statistically significant comparison between and within counties. In order to make the study results reflective of the actual population in the region, responses were weighted according to the proportion of residents living in each county (**See Chart 5**). The resulting residential distribution is as follows:

- 23% Seattle residents;
- 34% King County residents outside of Seattle;
- 20% Pierce County residents;
- 16% Snohomish County residents; and
- 7% Kitsap County residents.

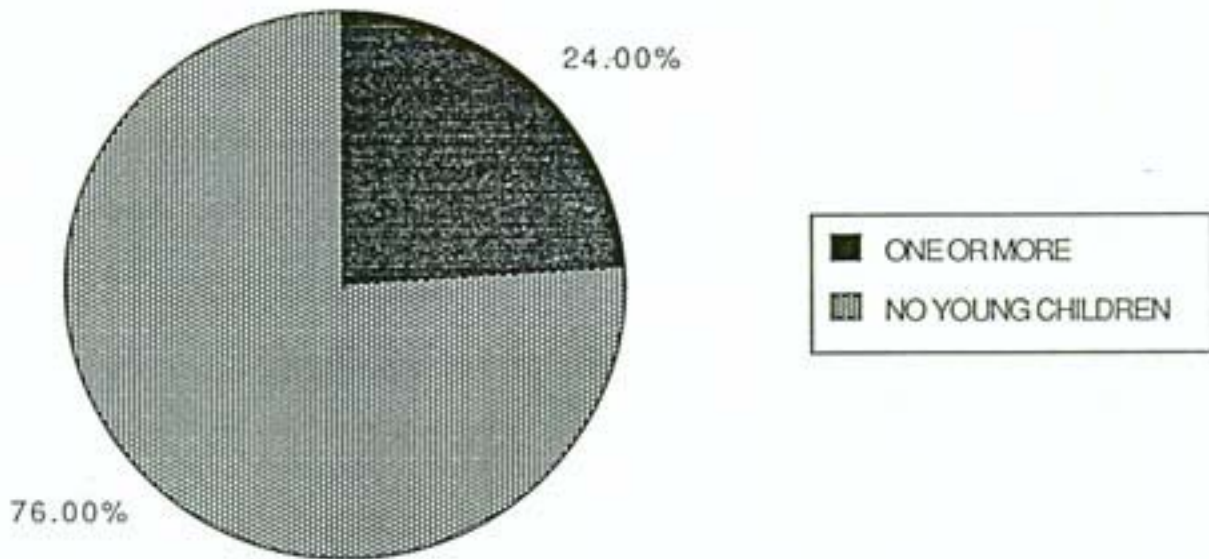
Over half of those surveyed (51%) had resided in the Puget Sound area for more than 20 years while the remaining respondents were distributed as follows (**See Chart 6**):

- 12% from 6 to 10 years;
- 12% from 2 to 5 years; and
- 5% less than 2 years.

CHART 4

Seattle Center Telephone Survey

FAMILY STATUS
- CHILDREN UNDER 12 LIVING AT HOME -



FAMILY STATUS
- CHILDREN 13 TO 19 LIVING AT HOME

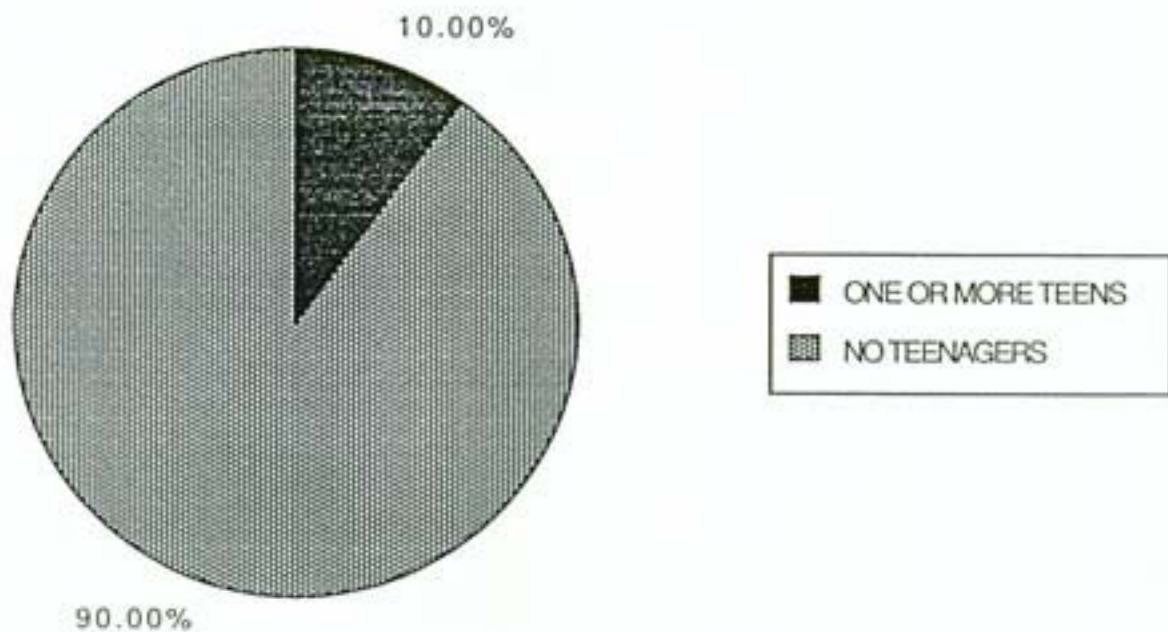


CHART 5
COUNTY

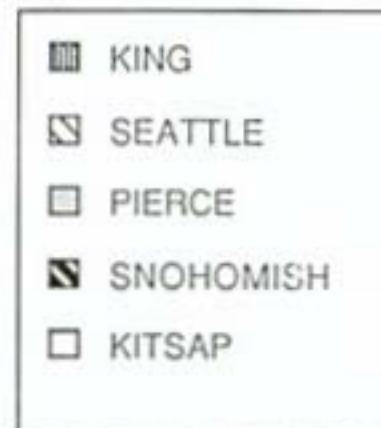
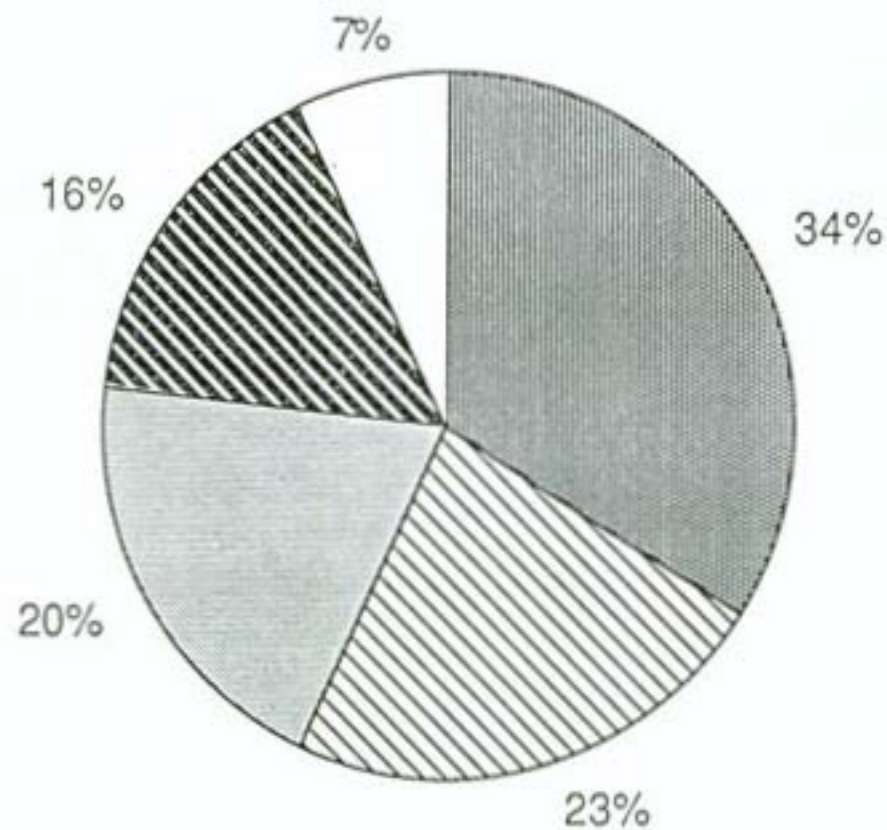
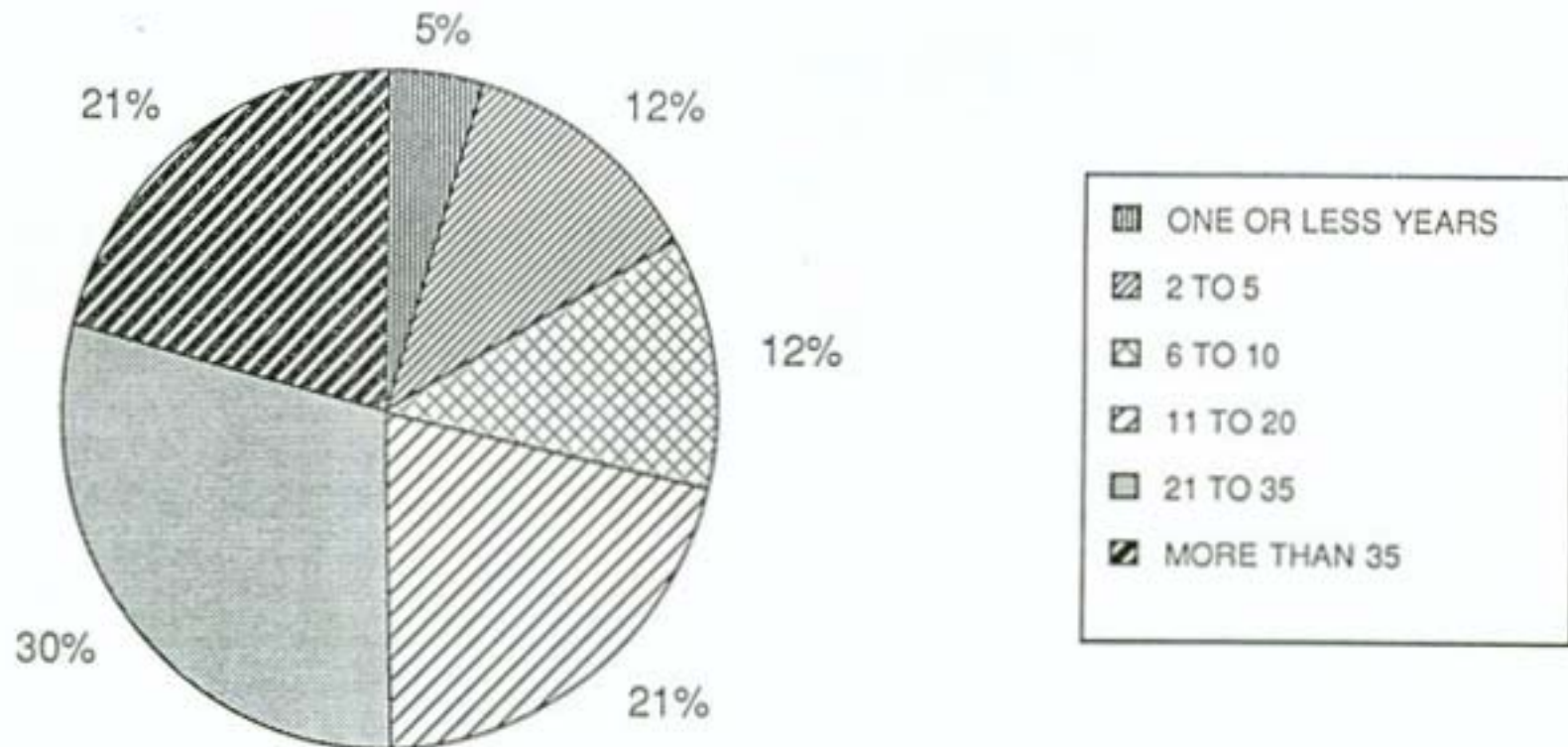


CHART 6

LENGTH OF TIME LIVED IN THE PUGET SOUND AREA



A-13

OCCUPATION

As **Chart 7** shows over seven out of 10 respondents were employed outside the home:

- 23% worked as professional or technical employees;
- 17% worked in white collar positions;
- 11% worked as managers or administration;
- 11% worked as skilled blue collar workers; and
- 8% worked as unskilled blue collar or service employees.

Of those not employed, the respondents consisted of the following out of the total:

- 10% were homemakers;
- 9% were retired; and
- 10% were either in military service, students, or unemployed.

Seattle and the rest of King County showed a higher proportion of professional employees (26% and 27%, respectively), while Pierce County had comparatively more blue collar workers (16% compared to 3% for Seattle).

About 15% of those surveyed worked in downtown Seattle:

- 27% of Seattle residents worked downtown; as do
- 16% of other King County residents;
- 15% of Snohomish County residents;
- 9% of Kitsap County residents; and
- 2% of Pierce County residents.

INCOME

Survey respondents were distributed by household income categories as follows (**See Chart 8**):

- 12% had an annual household income under \$15,000;
- 21% earned from \$15,000 to \$25,000;
- 21% from \$25,000 to \$35,000;
- 22% from \$35,000 to \$50,000; and
- 17% earned \$50,000 and more.

CHART 7
OCCUPATION

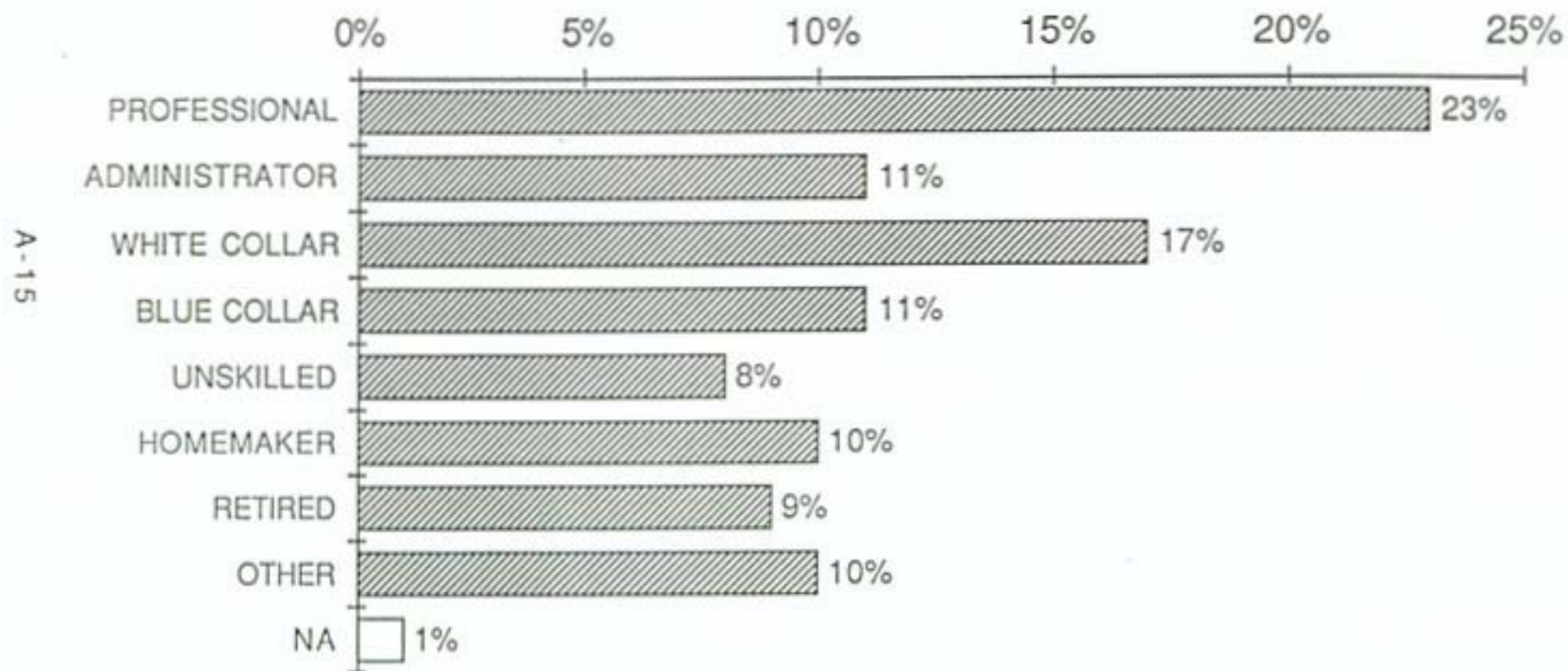
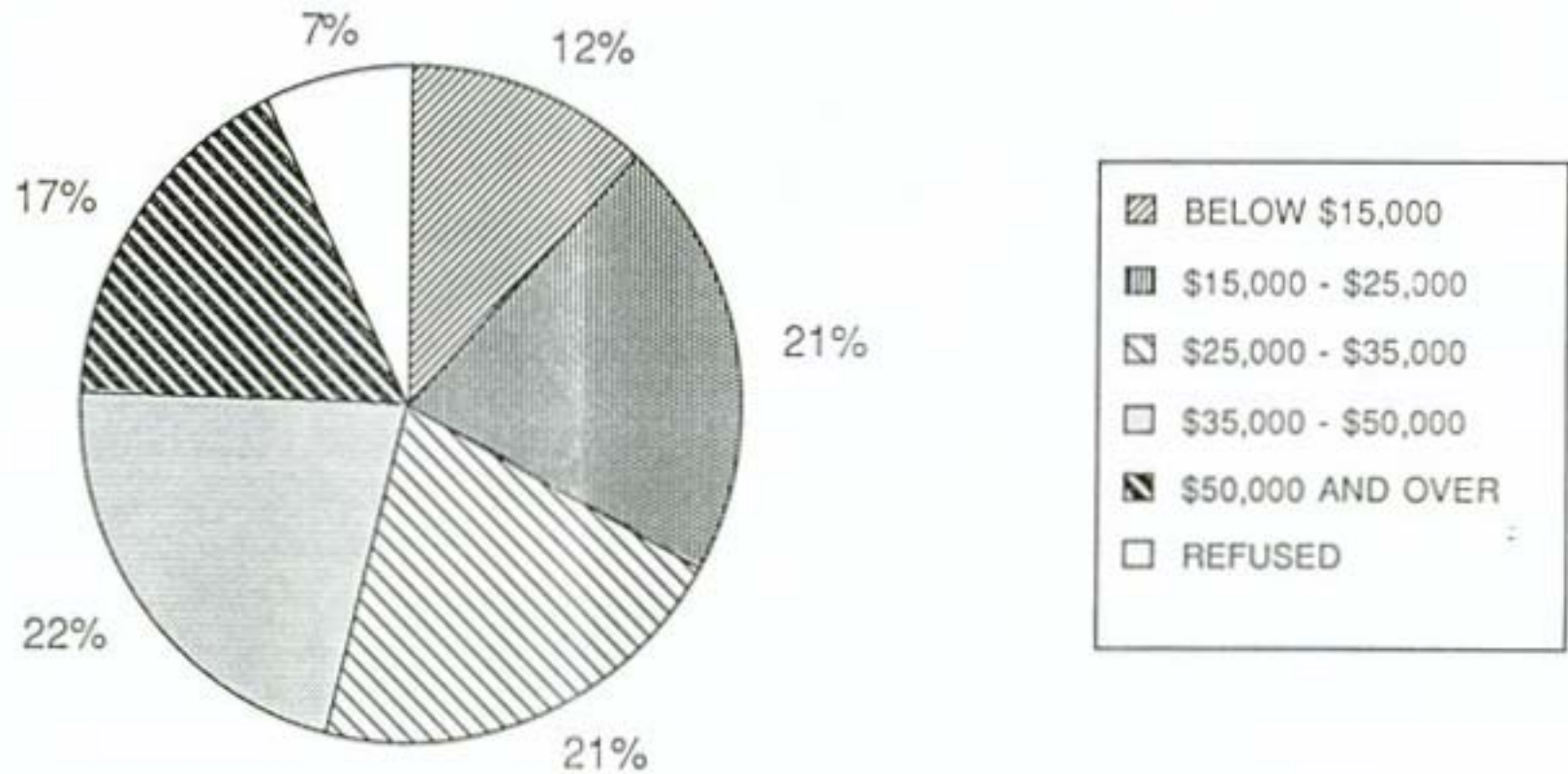


CHART 8
HOUSEHOLD INCOME



A-16

The portion of King County outside Seattle showed the highest incomes, with 24% earning \$50,000 or more annually, while only 7% earned less than \$15,000.

CHAPTER 3

SEATTLE CENTER VISITOR PROFILES

One of the survey objectives was to profile the Seattle Center visitors and the following sections discuss who visited Seattle Center, why they came to Seattle Center, why respondents did not come more often, how often they visited, when they usually came to Seattle Center, and what they did at Seattle Center.

SEATTLE CENTER VISIT EXPERIENCE

Based on weighted frequencies, **Chart 9** shows that in 68% of all households some members had been to Seattle Center in the previous year, but in 31% of the households no one had been to Seattle Center during this period.

- 19% of the respondents had been to Seattle Center, but not in the previous year,
- 14% had never been, or said they could not recall going to the Seattle Center,
- 52% of the respondents visited Seattle Center in the past year,
- 15% of the households had a member other than the respondent visit Seattle Center during the previous year.

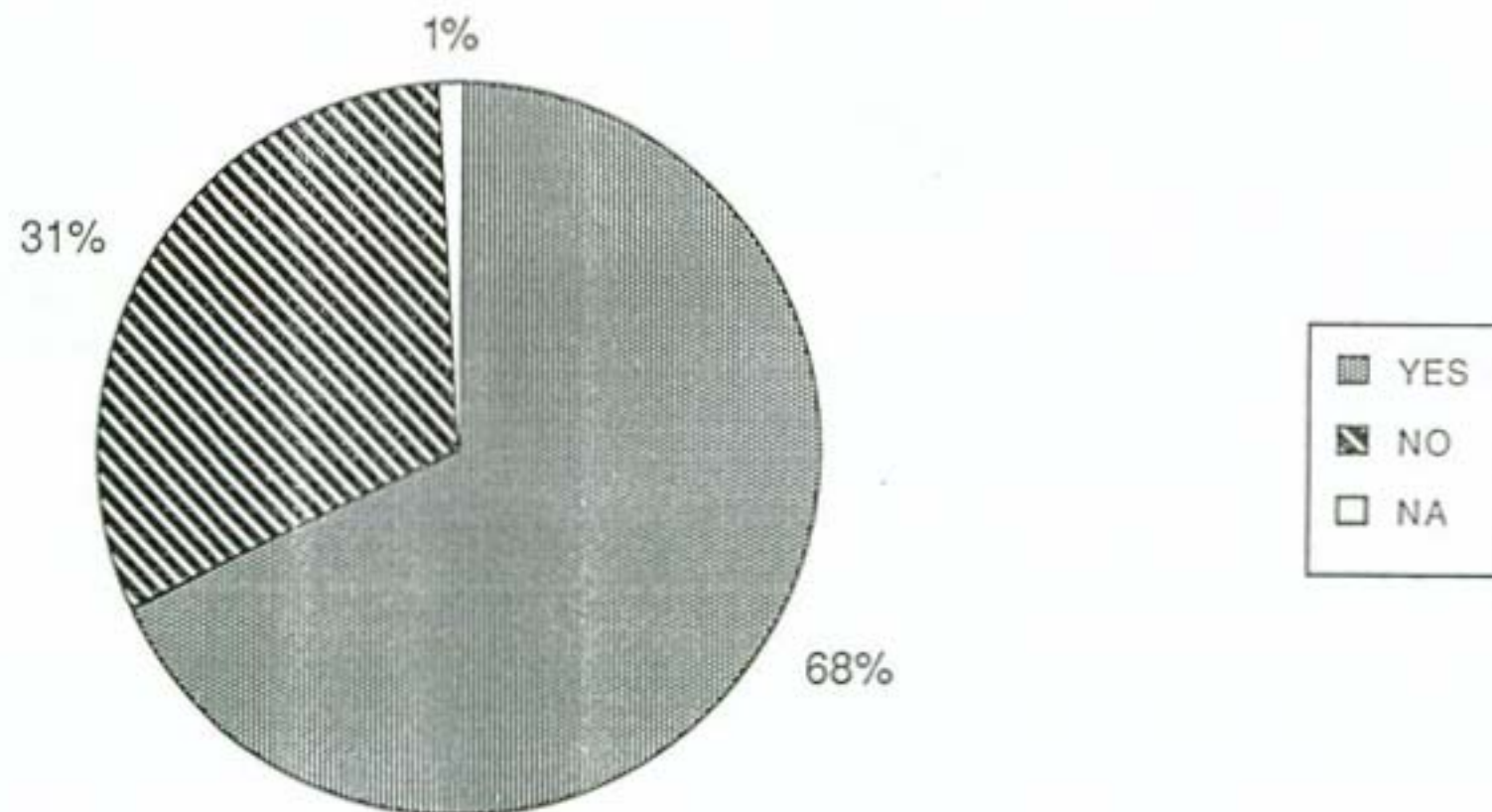
Household attendance by area was as follows:

- 83% of Seattle households visited Seattle Center,
- 73% of households in the rest of King County,
- 66% of Snohomish County households,
- 58% of Kitsap County households, and
- 47% of Pierce County households.

This pattern follows an expected geographic distribution of declining attendance with greater distance and time from Seattle Center. Kitsap County -which is located across Puget Sound from Seattle- had the highest proportion who had never visited Seattle Center (21%).

CHART 9

VISITED CENTER IN THE LAST YEAR



A-19

REASONS FOR VISITING SEATTLE CENTER

As discussed in the mission statement, Seattle Center is envisioned as a lively civic center which would accommodate a variety of uses, activities and events. Seattle Center, therefore, caters to a broad range of interests. To determine why visitors come to Seattle Center we asked respondents who had been to the Seattle Center in the past year the following: "In general, thinking of all the times you have been to the Seattle Center, why do you usually go there?"

Table 1 displays a wide range of reasons, even among the top ones mentioned. The Pacific Science Center and the Fun Forest were the most noted facilities, while special events, "fun and recreation," concerts, and "to walk around" were the most common purposes. Although particular events and facilities figured prominently in the reasons why people usually visit Seattle Center, some visitors saw it as a place for activities no more specific than "walking around."

Some differences among the reasons given for going to Seattle Center are the following:

- The Pacific Science Center was a less important attraction for people 16 - 34 years old (15%) and most attractive to those 35 - 54 (26%),
- "Fun and recreation" was a stronger motivation for younger ages (17%),
- Concerts, however, were the number one draw for this younger group (18%),
- Men were drawn more than women by the Sonics games (13% to 49%), and
- Interest in Opera House activities rose with age (11% of those 55 and older mentioned it),

REASONS FOR NOT VISITING MORE OFTEN

There are a number of reasons why residents do not go to Seattle Center or go more frequently. All respondents were asked why they have not visited the Seattle Center more often. Table 2 reveals that many reasons

TABLE 1

WHY DO YOU USUALLY GO TO THE SEATTLE CENTER?
 - Of Those Who Visited in Past Year -

TOP MENTIONS

| | |
|---------------------------------|-----|
| Pacific Science Center | 20% |
| Special events, general | 16 |
| Fun and recreation | 13 |
| Concerts | 12 |
| Fun Forest | 11 |
| To walk / wander around | 11 |
| Trade / consumer shows | 9 |
| To entertain out-of-town guests | 9 |
| Sonics basketball game | 8 |
| Bumbershoot festival | 8 |
| Exhibits | 7 |
| To take kids | 7 |
| Space Needle | 6 |
| Food Circus | 6 |
| Opera / Opera House | 4 |
| Sports, general | 4 |
| Laserium | 3 |
| Plays | 3 |
| Festivals | 3 |
| Other special events | 3 |
| To eat and drink | 3 |

Percentages may sum to more than 100% because respondents were allowed to give more than one answer.

TABLE 2

WHY HAVE YOU NOT VISITED THE SEATTLE CENTER MORE OFTEN?
- Total Sample -

TOP MENTIONS

| | |
|------------------------------------|-----|
| Too far away | 24% |
| Too busy | 21% |
| Not interested in what's there | 18 |
| No particular reason | 10 |
| Parking problems | 7 |
| Too expensive | 7 |
| Traffic / driving hassles | 6 |
| Don't like to go to the city | 5 |
| Work / school | 4 |
| I go there enough | 4 |
| Crime | 3 |
| Poor health / age | 3 |
| Other distance / location problems | 2 |
| Too congested / crowded | 2 |
| Weather / season | 2 |
| Kids too small / pregnant | 2 |
| Away a lot | 2 |
| New in town | 2 |
| Would go if had guests | 2 |
| Other personal factors | 2 |

Percentages may sum to more than 100% because respondents were allowed to give more than one answer.

concern factors beyond the control of Seattle Center, such as distance, full schedules, and negative perceptions of city activities. However, 18% of the respondents said they were "not interested in what is there". Parking problems and expense of activities are specific reasons mentioned, and these two factors have been consistently identified by other studies when respondents suggest improvements or problems. Other trends include the following:

- Men were more apt to say that they were "not interested" (22% to 15%),
- Distance was less of a problem for older respondents (15%),
- Younger people were more likely to be "too busy" (27%), and
- Older residents expressed more concern about the traffic (10%).

FREQUENCY OF VISITS

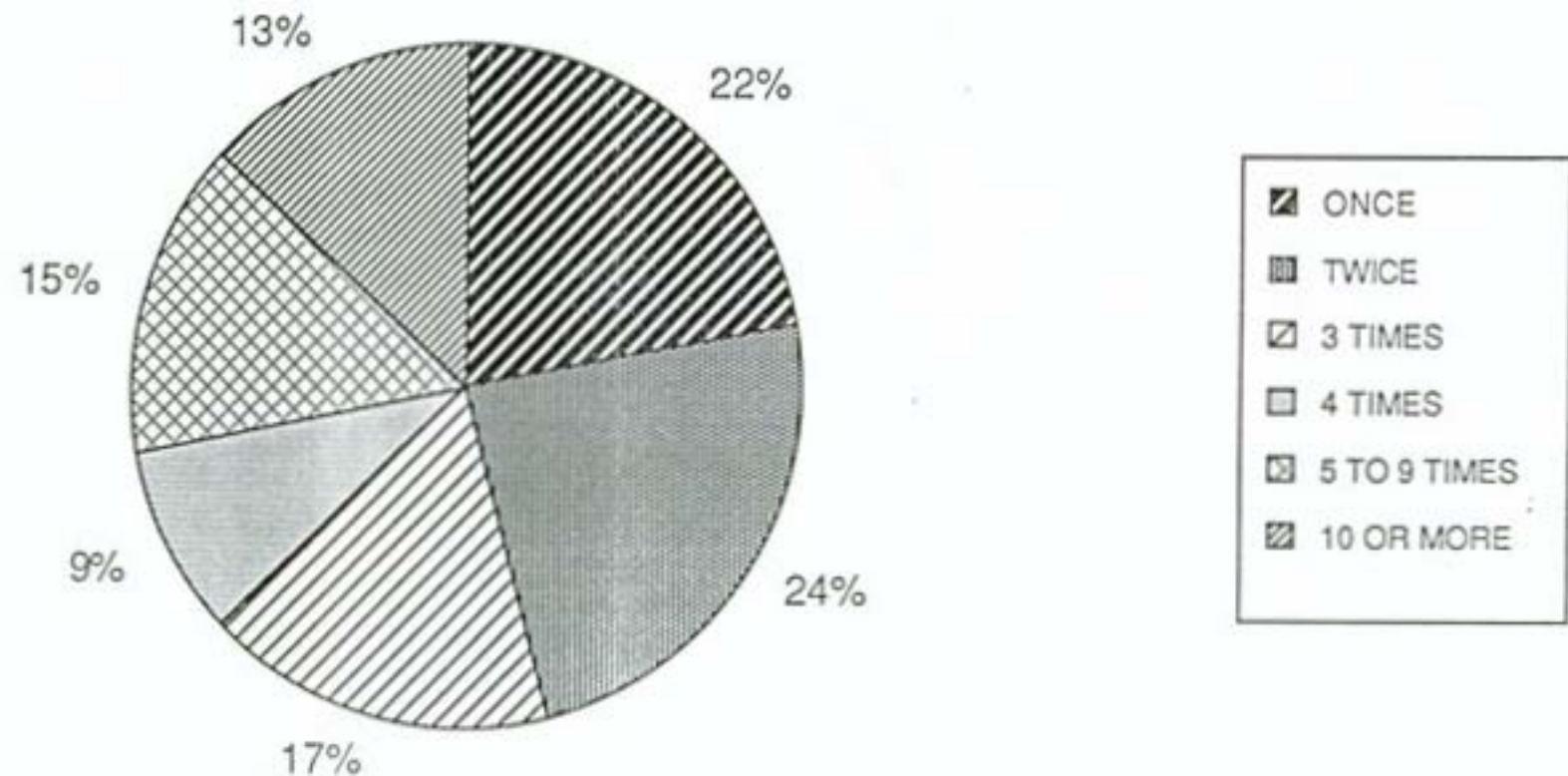
Seattle Center meets a variety of needs for Puget Sound area residents, as will be discussed later on what events and facilities were attended or visited. Our sample is based upon those people who have visited Seattle Center within the past year from January, 1987 through early February, 1988. **Chart 10** shows the distribution of respondents by the number of times they visited Seattle Center.

Among the group of recent visitors, 22% went to Seattle Center only once during the past year, while 13% visited ten times or more. The average reported number of past year visits by county were:

- 4.7 visits per respondent in Seattle;
- 3.6 in Kitsap County;
- 3.5 in King County outside Seattle;
- 3.3 in Pierce County; and
- 3.1 in Snohomish County.

Minority respondents were almost twice as likely to go ten times or more (23% to 12% for whites). On the other hand, older respondents were more apt to be one-time visitors (32%).

CHART 10
NUMBER OF VISITS
IN PAST YEAR



SEASON OF VISITS

Although there are year round events and attractions at Seattle Center, respondents most often said summer is the season when they usually went to Seattle Center. **Chart 11** shows the distribution.

- 57% chose summer;
- 15% chose winter;
- 10% chose spring; and
- 5% chose fall.

Summer was favored even more among young people and minority respondents (67%), while white respondents were somewhat more likely than minorities to go in the winter and spring (25% to 17%).

A look at the time of the most recent visits verified the preference for summer visits, with 30% saying their last Seattle Center visit was between July 1 and September 30, 1987.

ATTRACTIONS AND FACILITIES VISITED IN THE PAST YEAR

As specified in its mission statement, Seattle Center is a place where a variety of activities and facilities exist. We found that respondents attended a variety of types of events and facilities during the past year. The site inventory identifies the broad use patterns and attendance for each type of facility and use. Our survey showed that 16% of the respondents who visited Seattle Center attended only one type of activity as shown on **Chart 13**. Other respondents were distributed as follows: 32% attended 2-3 types, 31% attended 4-5 types, and 21% attended 6 or more types. Respondents who had visited Seattle Center in the previous twelve months were presented with a list of Seattle Center attractions and events and were asked if they had been to each. As shown in **Charts 12 and 13**, the most visited events and attractions were the following:

- International Fountain (69% visited last year);
- Center House (67%);
- Pacific Science Center (58%);
- Space Needle (47%);
- Festivals (46%);
- Fun Forest (45%); and
- Concerts (44%).

CHART 11
SEASON OF VISITS
IN PAST YEAR

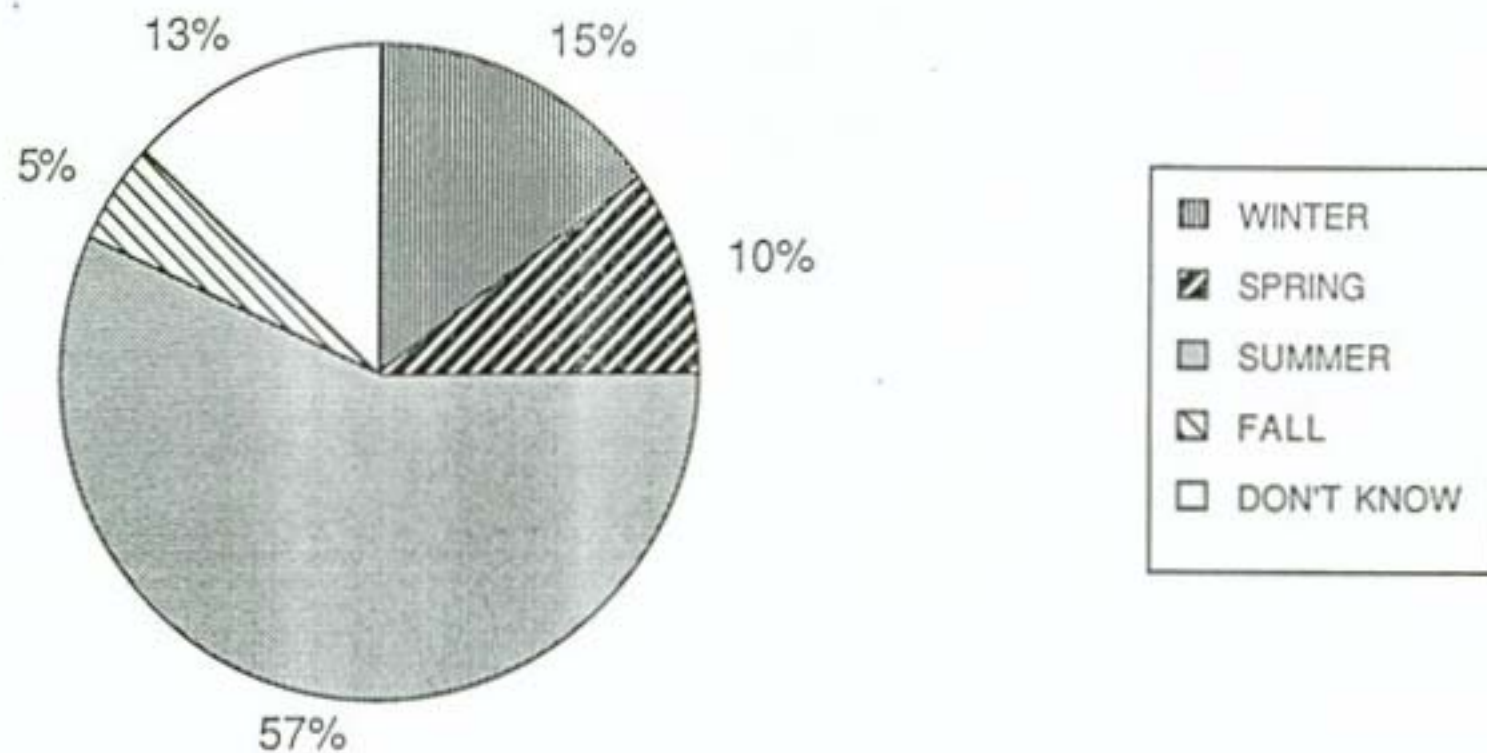
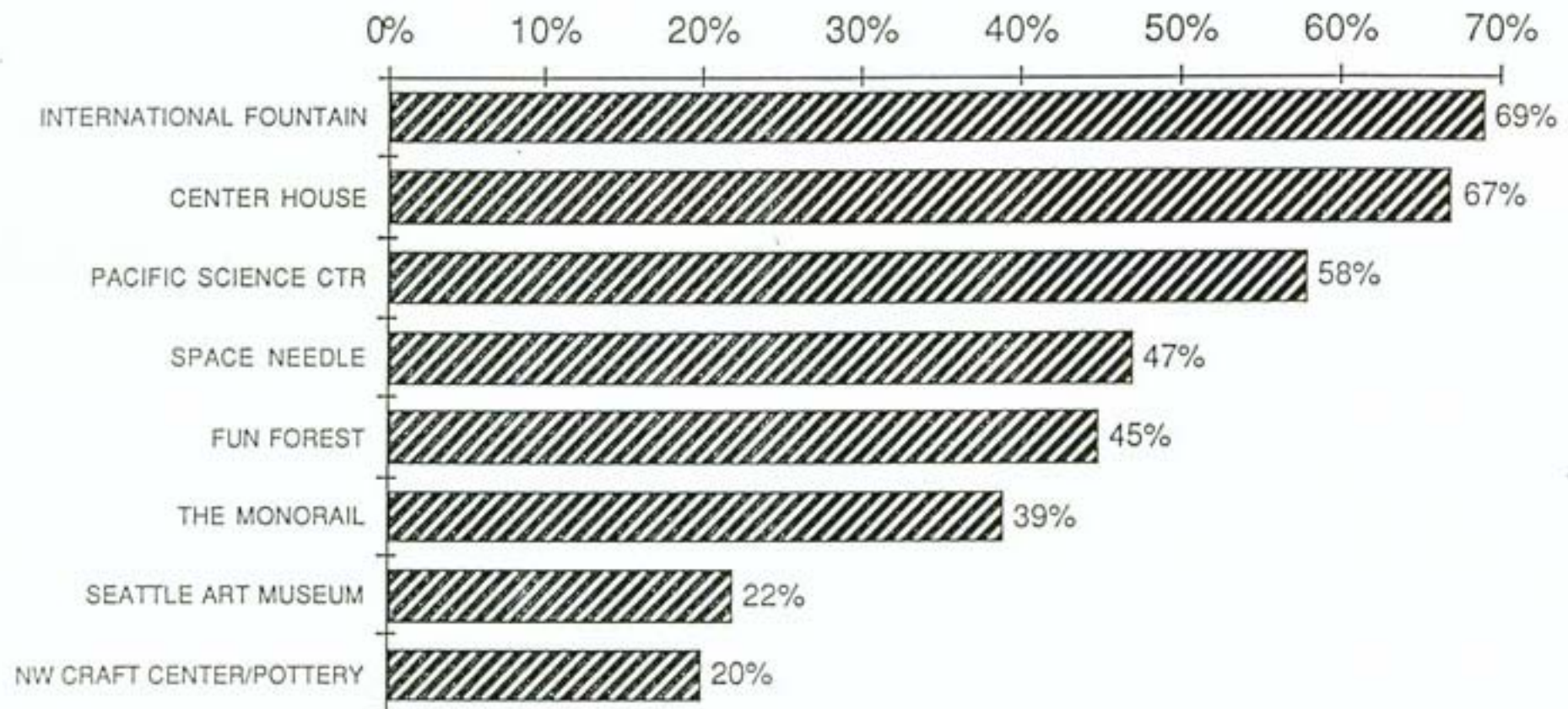


CHART 12

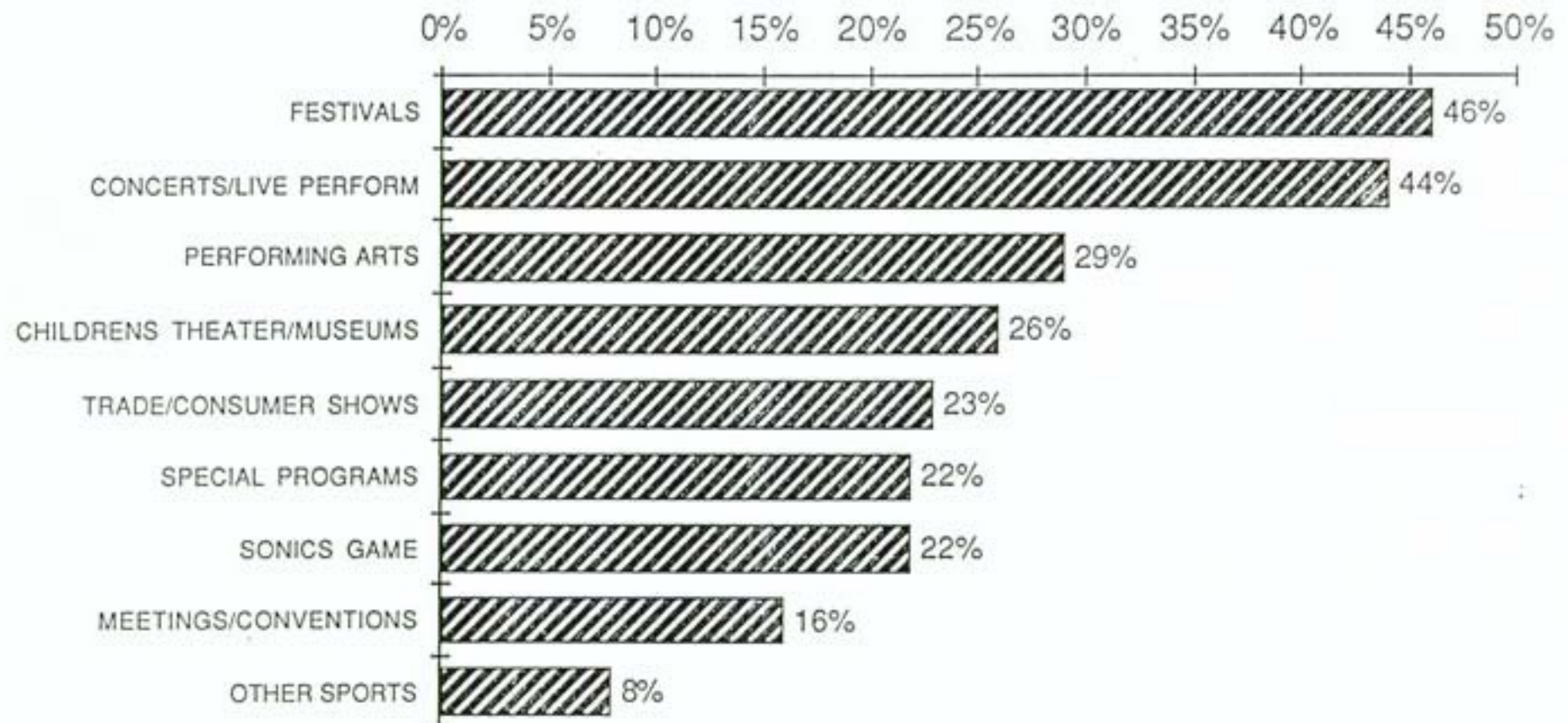
SEATTLE CENTER LOCATIONS VISITED IN PAST YEAR



A-27

CHART 13

SEATTLE CENTER EVENTS ATTENDED IN PAST YEAR



A-28

As previously noted, Seattle residents are the most regular visitors to Seattle Center, followed by people in the rest of King County; Snohomish, Kitsap, and Pierce counties. After analyzing attendance for specific attractions, variations from this overall trend appear:

- Pierce County residents go to the Pacific Science Center much more than would be predicted (61%);
- Kitsap County residents go to the Center House more (74%), and use the Monorail more (63%);
- People in Snohomish County go to the Pacific Art Center (23%), and attend more meetings and conventions (21%) and trade shows (27%) than expected; and
- Residents of King County outside Seattle go to the Fun Forest (50%) and Sonics games (26%) a bit more than expected.

Table 3 shows other activities which respondents said they did at Seattle Center during the past year. The most mentioned activity in this group was walking/wandering around. This activity was also identified in other studies and is related to the park aspects of Seattle Center.

The following sections identify attendance patterns for each of the attractions noted, in descending order of overall attendance. In addition to looking at demographic and general visit pattern data, the analysis compared attendance with users of the other facilities and events at Seattle Center.

International Fountain (69% attendance overall)

- Whites mention it more than minorities (71% to 56%)

TABLE 3

MISCELLANEOUS ACTIVITIES DURING PAST YEAR
- Of Those Who Visited in Past Year -

TOP MENTIONS

| | |
|----------------------------|----|
| Walking / wandering around | 8% |
| Food Circus | 4 |
| Concerts | 4 |
| Space Needle | 3 |
| Fun Forest | 3 |
| Pacific Science Center | 3 |
| Exhibits | 3 |
| Trade / consumer shows | 3 |
| Other special events | 3 |
| Center House | 2 |
| Shops | 2 |
| Laserium | 2 |
| Eating and drinking | 2 |

Center House (67% attendance overall)

- More popular among younger people (71% of those 16-34, compared to 60% of those 55 years and older)
- Most popular among people with children under 13 (78%)
- Center House users seemed to stay a bit longer than other facility users (25% over four hours)
- Center House users were also less likely to attend Sonics games (21%)

Pacific Science Center (58% attendance overall)

- Greater percentage among whites (58% to 48% for minorities)
- More popular among younger people (60% compared to 51% for those 55 years and older)
- Most popular among people with young children (68%)
- Pacific Science Center visitors were less apt to attend trade shows (25%) or conventions (17%)

Space Needle (47% attendance overall)

- Space Needle visitors brought out-of-town visitors more often (26%)
- They were not as interested in performing arts (31%), or the two art centers (16% and 20% attended the Pacific Art Center and the Seattle Art Museum, respectively)

Festivals (46% attendance overall)

- Much more popular among younger people (53%, compared to 29% for those 55 years and older)
- Festival goers were more likely than other user groups to attend Seattle Center in summer which happens to be the season of large festivals

- They were more apt to attend concerts (64%) and the Center House (80%)

Fun Forest (45% attendance overall)

- More popular among whites (46%) than minorities (32%)
- Most popular among people with young children (59%)
- Fun Forest users were more likely to be summer visitors (68%)
- They were also more apt to visit in larger groups (28% in groups of five or more)
- They were less interested in Seattle Center performing arts (31%, but among the highest visitors to the adjacent Space Needle (58%))

Concerts (44% attendance overall)

- More popular for younger respondents (52% to 36% for those 55 and older)
- Concert goers were more likely than any other user group to go to festivals (67%)

Monorail (39% use overall)

- Somewhat higher use among younger visitors (43% to 34% for people 55 and older)
- Kitsap County residents had a higher proportion of their visitors use the monorail (63%)

Performing Arts (29% attendance overall)

- Highest attendance among households earning \$35,000 or more (35% to 24% among those earning less)
- Greater attendance among whites (30% to 19% for minorities)
- Most popular with older people (38% to 21% for those under 35 years)

- Performing arts patrons were less apt to bring out-of-town visitors (12%)
- They used the Fun Forest less than other user groups (48%), but attended concerts more often (64%)

Children's Theaters (26% attendance overall)

- Most popular among households with children under 13 (41%)
- Less attendance by less wealthy households (21%)
- Patrons of children's theaters were less likely to attend Sonics games (21%) and more apt to go to the Fun Forest (59%)
- Among user groups, they were by far the most interested in the Pacific Science Center (84% attendance)

Trade Shows (23% attendance overall)

- Higher attendance among men (27% to 19% for women) and households earning more than \$35,000 annually (29%)
- People who came to trade shows or meetings were among the least likely to go to concerts (48%) or festivals (50%), but were the most frequent Sonics games attendees (30%)

Center House Programs (22% attendance overall)

- No real differences among types of people or user groups

Sonics Games (22% attendance overall)

- Much higher attendance among men (31% to 12% for women)
- Less attendance among the lowest income group (16% to 27% to those earning \$35,000 plus)
- Compared to other user groups, Sonics and other sports enthusiasts were less likely to go to the Center House (70%), the Pacific Science Center (58%), the children's theaters (26%), or Seattle Center craft attractions (20%)

- However, they were more likely than the others to go to meetings and conventions there (26%)

Seattle Art Museum Pavilion (22% attendance overall)

- Higher attendance for people with teenagers at home (30%)
- Visitors to different arts and crafts facilities (including the Seattle Center - Seattle Art Museum Pavilion) were less likely to go to the Space Needle (48%)
- There were more apt to patronize Seattle Center's performing arts events (45%), the children's theaters (43%), other Center House programs (36%), and trade shows (32%)

Northwest Craft Center and Pottery Northwest (20% attendance overall)

- Most popular among older respondents (27% use, compared to 16% for those under 35 years)

Meetings and Conventions (16% attendance overall)

- Greater attendance among minority respondents (26% to 15% for whites)
- Greatest attendance for the 35 to 54 age group (22%)

Pacific Art Center (15% attendance overall)

- See "Seattle Art Museum" for discussion of comparisons with other user groups

Other Sports Events (8% attendance overall)

- See "Sonics Games" for discussion of comparison with other user groups

OTHER STUDIES

Two past studies have also asked respondents about the annual visits to Seattle Center. A 1985 study conducted by using on-site interviews found that the typical visitor is from Seattle; 23% come 3-5 times per year

with 23% coming 6-12 times while the median is 3 visits; 48% have children under 18 years old with 34% having children under 13; and 17% were minorities. A 1980 study on attitudes and use by King County residents found the following: 82% had been to Seattle Center in the past year, 85% had been to more than one event or facility with 47% having been to four or more; the most frequently visited attraction was the Center House with 33% but an added 45% for those who had visited the Food Circus and International Bazaar; the Center House activities were followed by Pacific Science Center (34%), the Space Needle (32%), the Fun Forest (28%), the grounds/park (21%), the Opera (21%), consumer shows (18%), exhibits/trade shows (16%), and the Repertory Theater (13%).

CHAPTER 4

PROFILE OF THE MOST RECENT VISIT TO SEATTLE CENTER

To better understand what occurs on a visit to Seattle Center, we asked respondents when was their most recent visit to Seattle Center, why they went, who they went with, how long they stayed, how much they spent, what they visited at Seattle Center, and if they visited other attractions on the same trip. **Chart 14** shows the monthly breakdown of when respondents made their last visit.

PURPOSE OF MOST RECENT VISIT

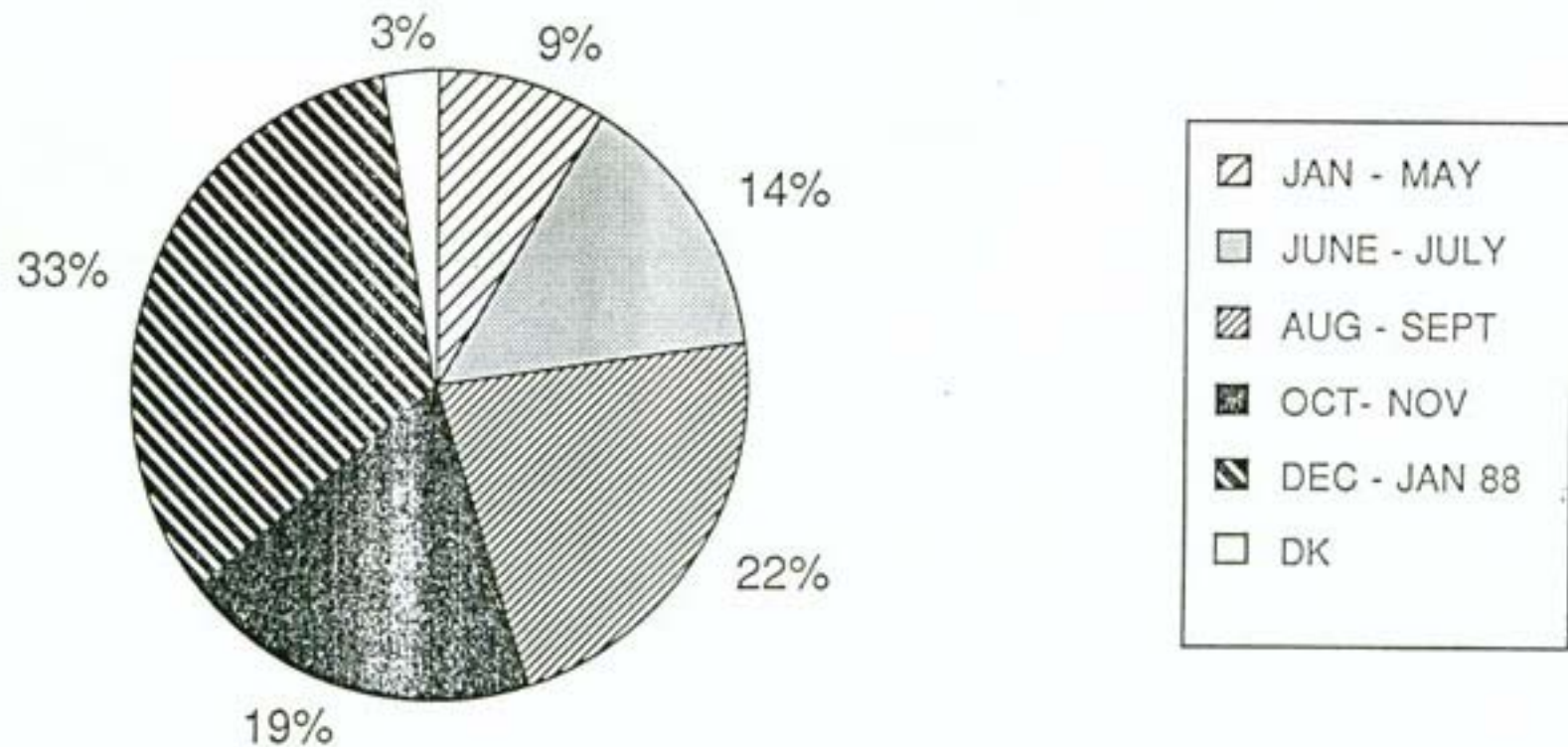
Table 4 shows that quite a few people thought of Seattle Center as a place "to walk around" (19%). Older respondents were more likely to mention "eating and drinking" (24% to 13% for those 16 - 34 years old). The Food Circus, eating and drinking, the Space Needle, and the Pacific Science Center were other primary purposes for these most recent visits. Concerts and the Space Needle came in fourth for those under 35 years of age, surpassed only by "walking around," the Food Circus, and "eating and drinking."

TRANSPORTATION FOR THE MOST RECENT VISIT

Car was by far the most popular means of getting to Seattle Center, with 89% of the total (See **Chart 15**). Five percent (5%) took the bus, and 4% took the monorail (which has a terminal in the Seattle Center). Seattle residents were more likely to use something other than a car (19%), while 17% of Kitsap County respondents said they arrived there by monorail on their last visit. This might be explained by the fact that the other terminal of the monorail is in the direction of the ferry terminal serving Kitsap County.

Respondents who visited Seattle Center more often in the past year use a car less often (84% compared to 95% of one-time visitors). The same is true for people with no children at home (85% car use compared to 93% among households with children).

CHART 14
MONTH OF MOST RECENT VISIT
IN PAST YEAR



A-37

TABLE 4

PURPOSE OF LAST VISIT
- Of Those Who Visited in Past Year -

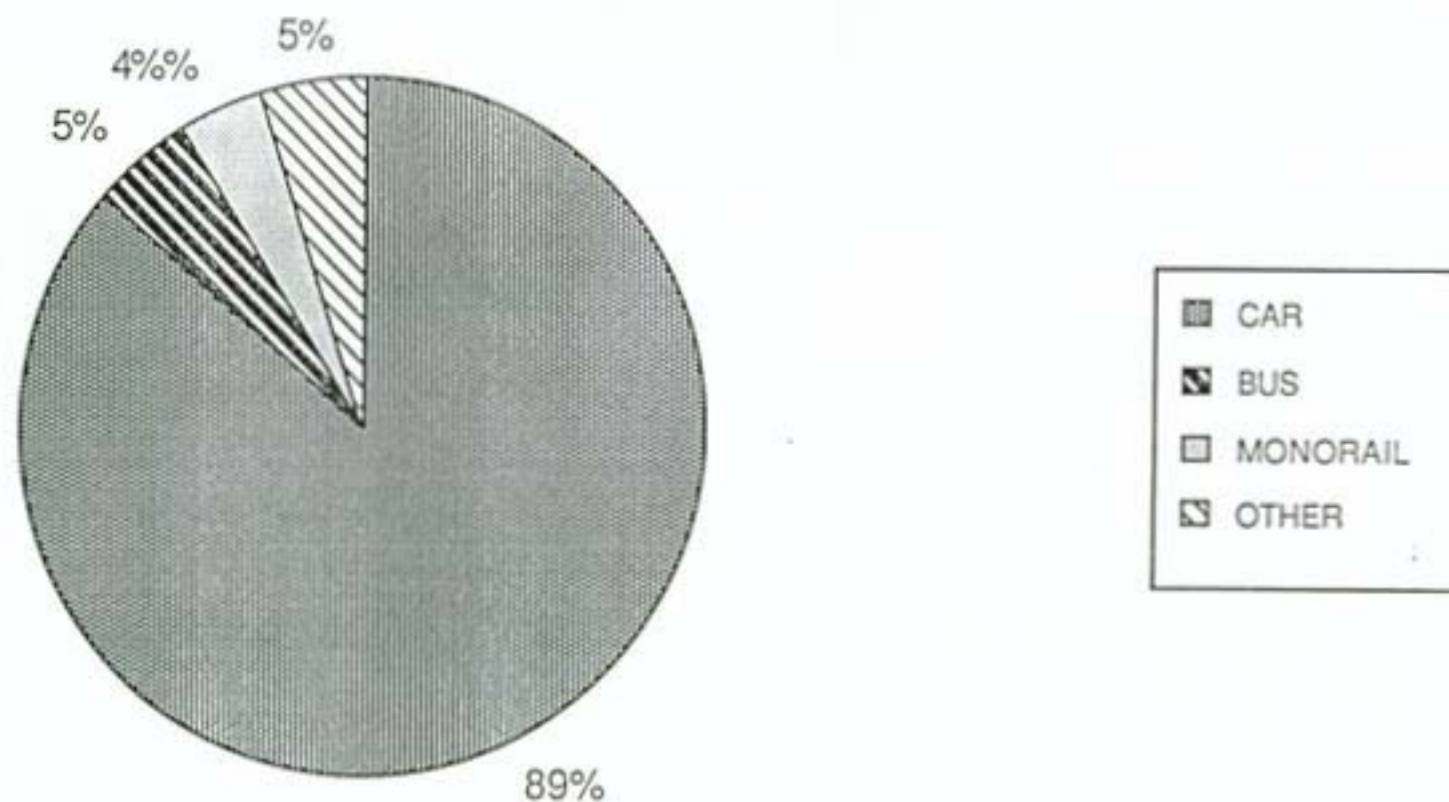
TOP MENTIONS

| | |
|---------------------------------|-----|
| To walk / wander around | 19% |
| Food Circus | 16 |
| To eat and drink | 16 |
| Space Needle | 11 |
| Pacific Science Center | 11 |
| Sonics basketball game | 9 |
| Fun Forest | 8 |
| Trade / consumer shows | 8 |
| Exhibits | 7 |
| Concerts | 7 |
| Bumbershoot festival | 6 |
| To entertain out-of-town guests | 5 |
| Laserium | 4 |
| Plays | 4 |
| To take kids | 4 |
| Monorail | 3 |
| Center House | 3 |
| Shops | 3 |
| Meetings / conventions | 3 |
| Other special events | 3 |
| Fun and recreation | 3 |

Percentages may sum to more than 100% because respondents were allowed to give more than one answer.

CHART 15

TRANSPORTATION FOR LAST VISIT
(MOST RECENT VISIT)



GROUP COMPOSITION

About one third (33%) went in groups of two people the last time they visited the Seattle Center. Seven percent (7%) went alone, and the rest had more people with them. **Chart 16** shows the distribution by number in the group. Younger respondents were more apt to go in groups of five or more (25%, compared to 13% for those 55 and older).

Less than one in five (18%) took out-of-town visitors the last time they went to the Seattle Center (**See Chart 17**). Older people were somewhat more likely to do so (25%).

LENGTH OF VISIT

The average visit length was from two to three hours (37%), with 19% staying for more than four hours. **Chart 18** depicts the distribution by category. Respondents from farther away -Pierce and Kitsap Counties- had longer visits (30% and 29% over four hours, respectively). Older respondents were also more likely to stay for more than four hours (25% compared to 16% for the 16-34 age group).

GROUP EXPENDITURES

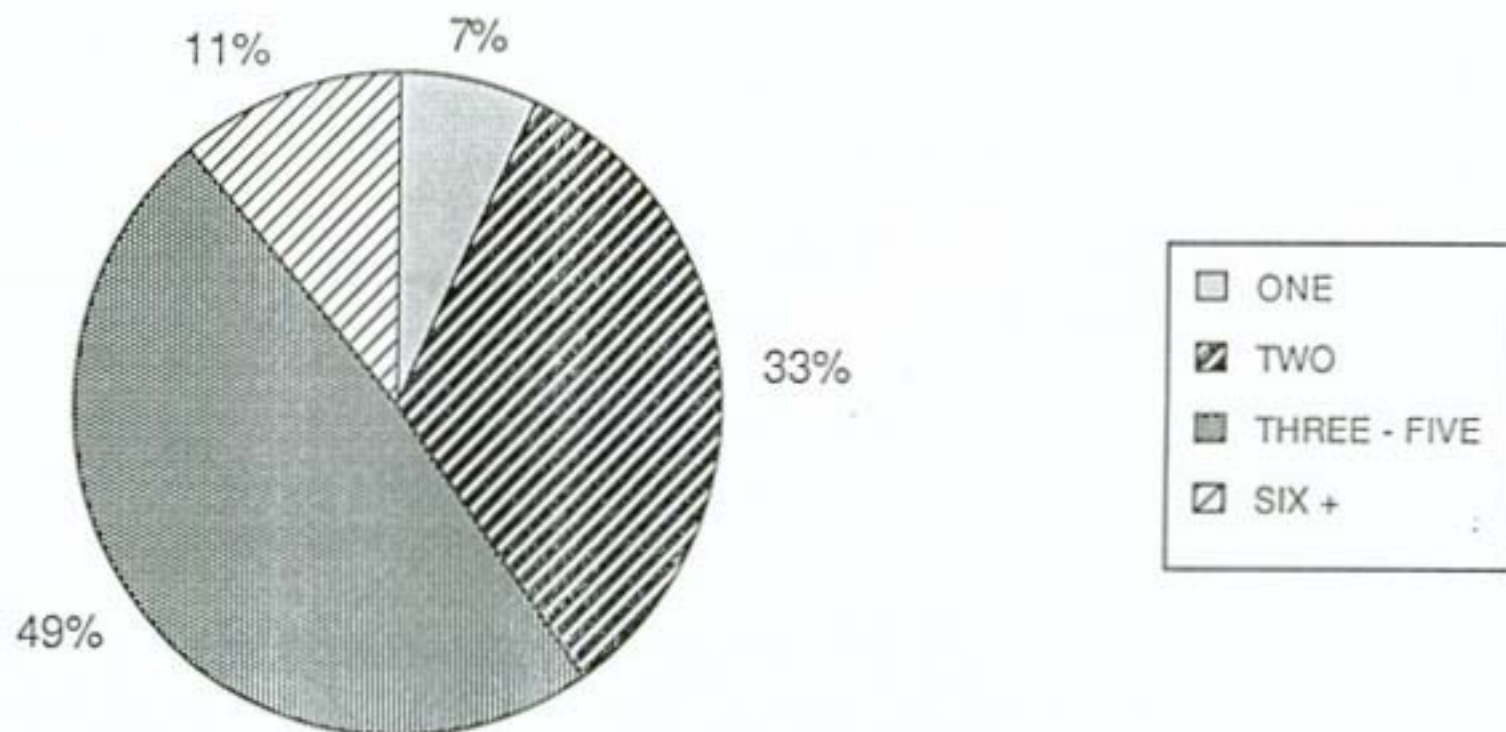
As shown in **Chart 19** the following pattern occurred for expenditures not including tickets or admission fees for events - but including parking:

- the average group expenditure was between \$10 and \$20;
- 10% spent nothing; and
- 12% spent more than \$50.

Group expenditures did not vary considerably among household income categories. Minority respondent groups seemed to spend more than white respondent groups (only 16% spent less than \$10, compared to 33% of whites).

CHART 16

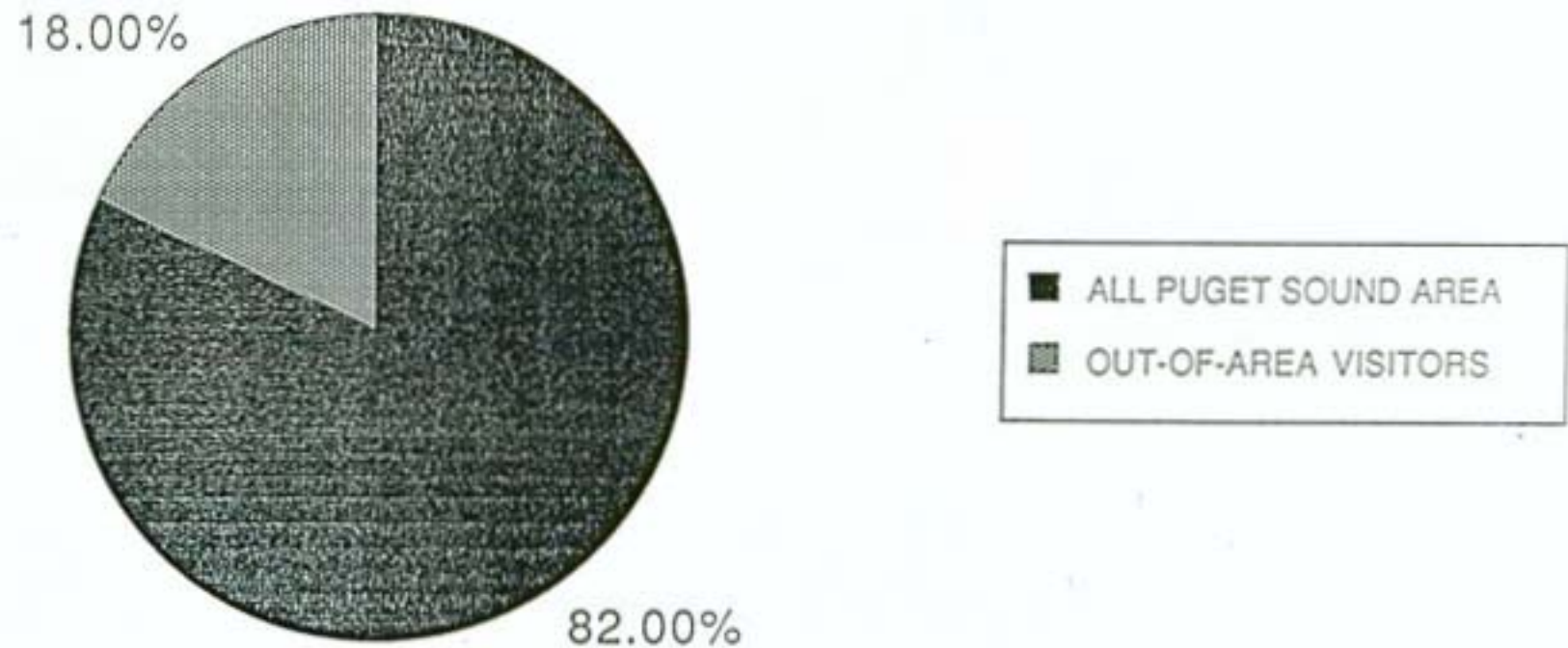
TOTAL NUMBER IN GROUP
(MOST RECENT VISIT)



A-41

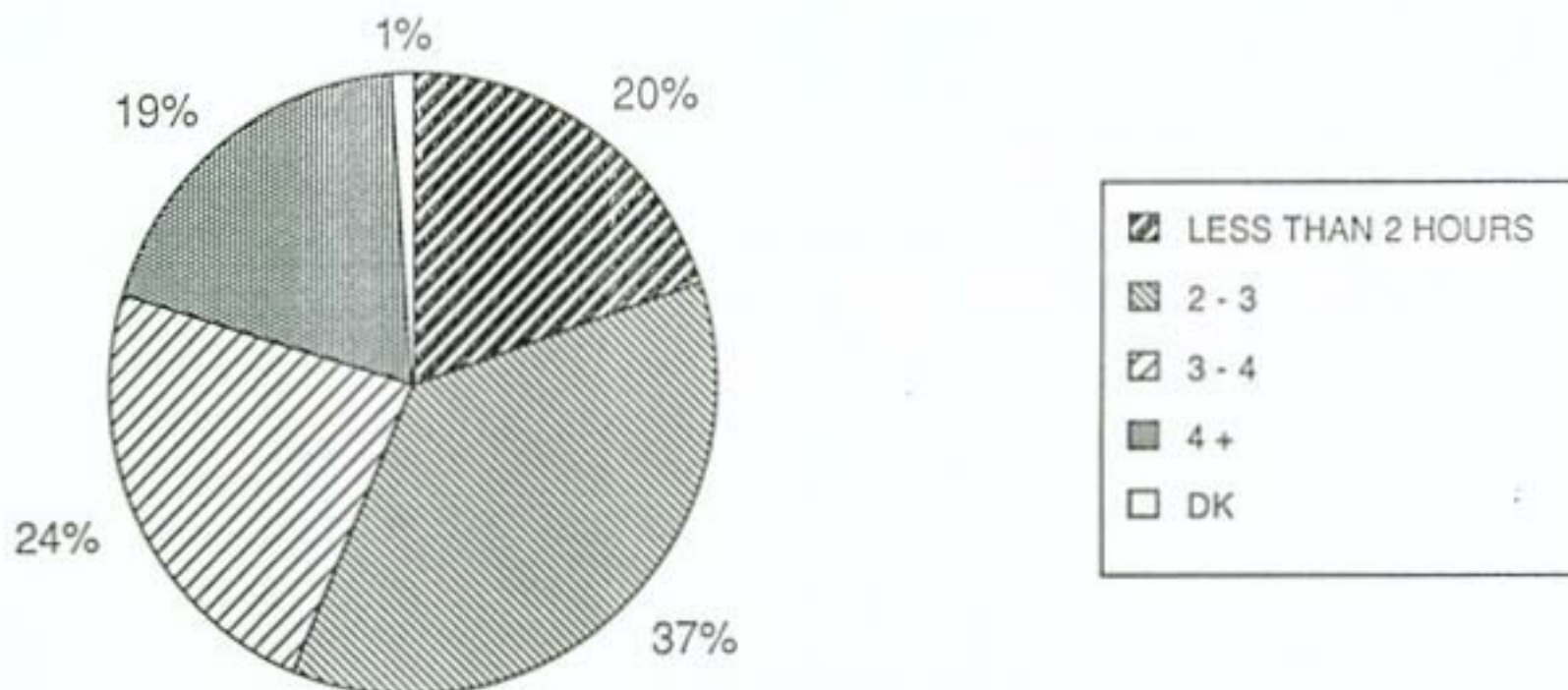
CHART 17

VISITORS IN GROUP
(MOST RECENT VISIT)



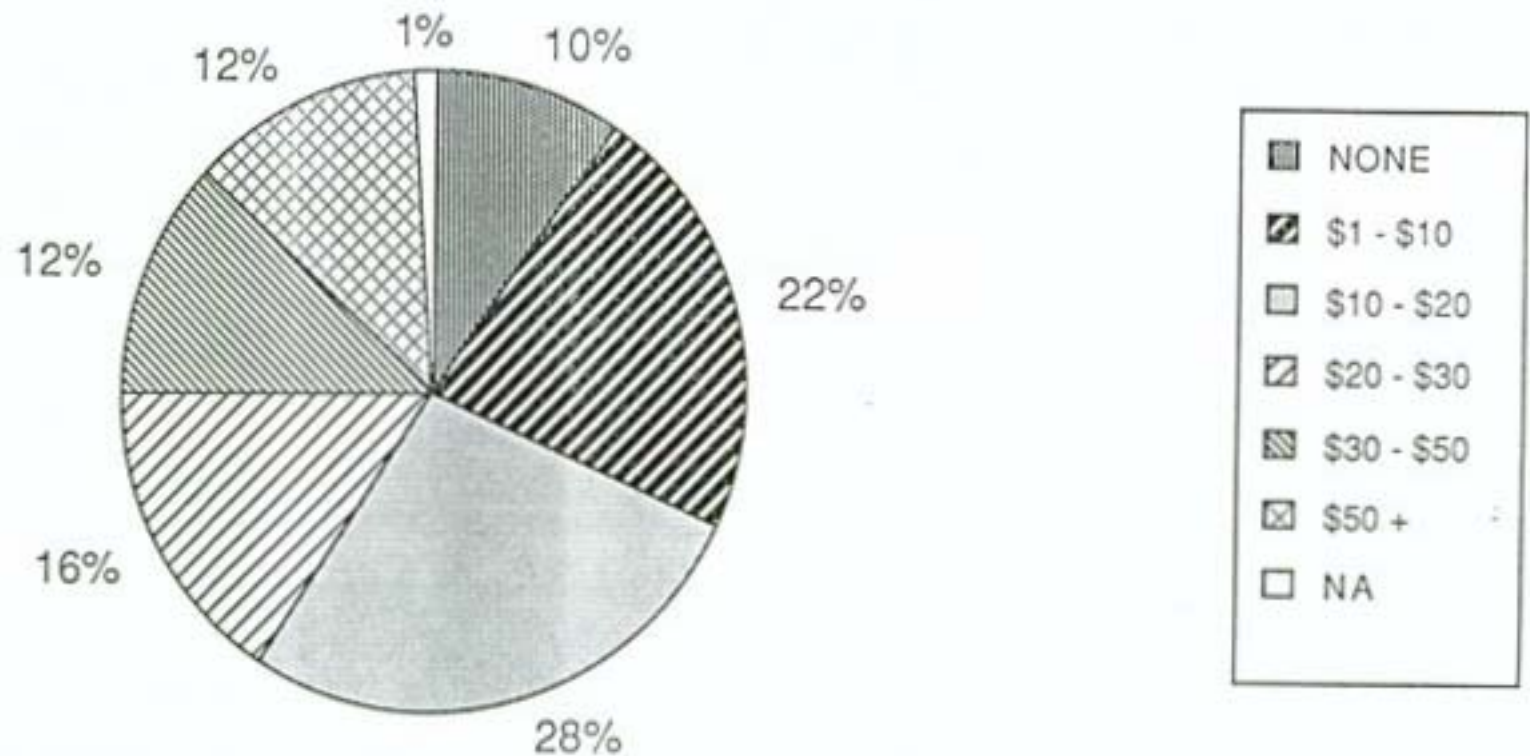
A-42

CHART 18
LENGTH OF STAY ON GROUNDS
(MOST RECENT VISIT)



A-43

CHART 19
AMOUNT SPENT BY GROUP
(MOST RECENT VISIT)



A-44

OTHER ATTRACTIONS VISITED ON THE SAME TRIP

As Table 5 indicates, a majority of Seattle Center patrons (58%) went nowhere else in Seattle during their last visit. Those who did stayed in the nearby downtown area: the waterfront, Pike Place Market, etc. Older visitors were less likely to have visited anything outside Seattle Center (72% went nowhere else, compared to 49% of those in the 16-34 age group).

OTHER STUDIES

The 1985 Seattle Center Visitors Study found that the average group was 3.2 persons; the length of stay was three hours, and the average expenditure was about \$20. The primary reasons for the visit were 36% came for an event or an exhibit, 17% came for something at Center House, 14% came to sightsee, and 9% came to the Space Needle. While at Seattle Center they also did other things such as they went to the Center House (90%), relaxed and passed the time, rode the monorail, and visited the grounds, the Fun Forest, the Pacific Science Center, and art exhibit areas. Visitors arrive primarily by car (68%) with 14% coming by monorail and 9% by bus. Summer visitors are twice as likely to take the monorail.

The Seattle Center survey done between August and December, 1983 showed visitors were mostly from Seattle (30%) compared to 22% from the rest of King County. Visitors from outside of the state represented 22%. The age group for those visitors showed that 35% were between 25-44 years of age with another 19% between 18 and 24. The primary mode of transportation was by car (67%), with 9% coming by bus and another 10% by foot. The primary reasons for visiting Seattle Center was to attend an event (22%), to sightsee (20%), and attend the Pacific Science Center (9%). Other activities included eating and shopping at the Center House, relaxing in the park, just passing the time, and visiting the Pacific Science Center and the Space Needle.

The 1980 study on attitudes and use of Seattle Center showed that 45% came in groups of 2-3 people, while 18% visited in a group of six or more people. Family groups accounted for 36%. Visitors generally stayed between 2-4 hours (57%). 88% came by car, 6% took the bus, and only less than 5% rode the monorail, bicycled, or walked. Seattle visitors were more likely to use the bus. 48% of the respondents visited the Center House, 11% visited Pacific Science Center, 16% visited the park, 14% visited the Space Needle, 17% visited exhibits/conventions, and 13% went to a concert.

TABLE 5

OTHER SEATTLE SPOTS VISITED DURING LAST VISIT
- Of Those Who Visited in Past Year -

TOP MENTIONS

| | |
|-------------------------------|-----|
| Nowhere else | 58% |
| Waterfront | 11 |
| Pike Place Market | 10 |
| Restaurants/bars | 8 |
| Downtown, general | 2 |
| Department stores | 2 |
| Pioneer Square | 2 |
| Other downtown spots | 2 |
| Some place adjacent to Center | 2 |

CHAPTER 5

CURRENT PERCEPTIONS ABOUT SEATTLE CENTER

In assessing the local and regional visitor market for Seattle Center, the present perceptions of Seattle Center may play an important role in determining what elements make Seattle Center successful, and these perceptions provide us with an understanding on which future developments can be built. There are different opinions about what Seattle Center is or should be depending on the type of user and the user's familiarity with Seattle Center. Our discussion of current perceptions involved identifying what visitors liked best, whether they saw Seattle Center as a regional facility or as a City of Seattle facility, and how they perceived Seattle Center given certain functional descriptions, such as a performing arts center.

BEST ASPECTS OF SEATTLE CENTER

When asked what they liked best about Seattle Center, respondents most often mentioned the Pacific Science Center. **Table 6** shows the top responses. The Space Needle and the Center House Food Circus were also big draws, while less specific qualities, such as the variety of things to do, the atmosphere, physical characteristics of the place, were important parts of what people like about Seattle Center. Another interesting finding is that, although about half noted visiting the International Fountain and the Center House in the past year, these two facilities were much less important on this list of "favorite things".

Other studies found similar preferences. The 1985 study found that 17% liked the Center House best, followed by the variety of things to do (15%), special events/public programs (13%), the atmosphere (12%), and the Space Needle (11%). The 1983 study found that the top attraction was the Space Needle at 9%, followed by Pacific Science Center and food (6%), and the International Fountain, the park setting, and Center House (5%). For some what they liked best was that there was much to do (7%).

TABLE 6

WHAT DO YOU LIKE BEST ABOUT THE SEATTLE CENTER?
- Total Sample -

TOP MENTIONS

| | |
|--------------------------------|-----|
| Pacific Science Center | 17% |
| Variety of things to do | 11 |
| Space Needle | 9 |
| Food Circus | 6 |
| Atmosphere / nice facility | 6 |
| Fun Forest | 4 |
| Walking / wandering around | 4 |
| Physical characteristics | 4 |
| Center House | 3 |
| Exhibits | 3 |
| Many things to do in one place | 3 |
| Open spaces | 3 |
| Everything | 3 |

REGIONALISM AND SEATTLE CENTER

Recent discussions in the Puget Sound area have focused on the regional nature of many governmental functions. For regional attractions, such as the Woodland Park Zoo, the Seattle Aquarium, and Seattle Center, the function and support of these facilities have often been discussed in a regional context and not just a City of Seattle context. Recently, King County residents voted to support a bond issue for the zoo. As needed capital improvements occur, ways to finance them often include discussions about whether the facilities are regional or more city in nature. **Chart 20** shows the following out of the total sample:

- 50% think of the Seattle Center more as a City of Seattle facility; and
- 47% think of it more as a regional facility

Seattle residents were somewhat more likely to consider Seattle Center to be a Seattle facility (57%), but even at the other end of the spectrum, 42% of Kitsap County residents agreed with this. Further analysis shows that:

- Minority respondents thought of it more often as a Seattle facility (62%)
- More frequent users were more likely to emphasize its regional nature (55% among those visiting five or more times in the past year)
- Pacific Science Center patrons were slightly more attuned to its regional aspects (54%)

CURRENT PERCEPTIONS ABOUT SEATTLE CENTER'S FUNCTIONS

To determine the kind of function that respondents believed Seattle Center performs, we asked how well each of eight descriptions of the Seattle Center fit their perception of Seattle Center. The results are presented in **Chart 21**. The following sections describe the characteristics of those respondents who answered "exactly" to the descriptions.

CHART 20

REGIONAL OR SEATTLE FACILITY

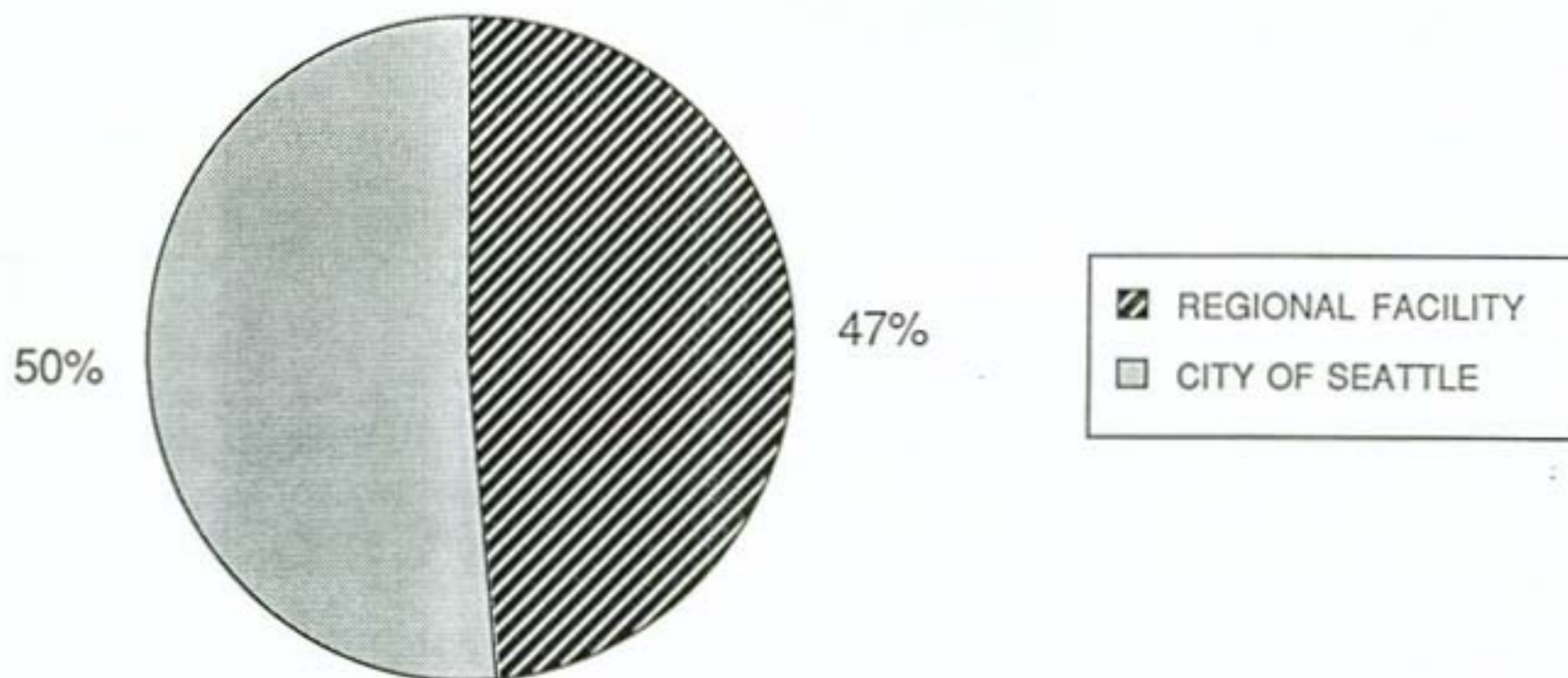
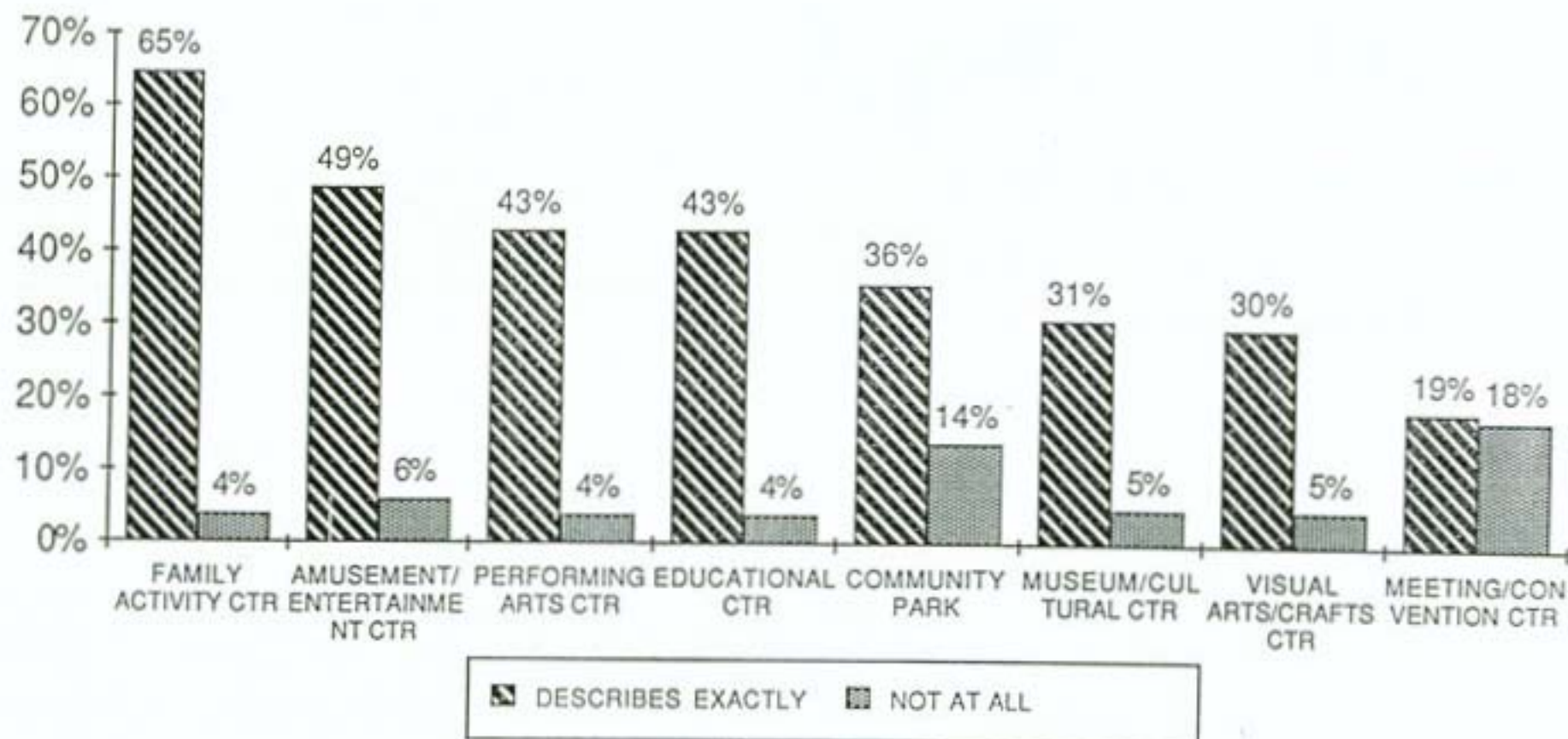


CHART 21

THE SEATTLE CENTER IS A.....



Family Activity Center (65% said fit "exactly")

Strongest agreement was among:

- less wealthy respondents (72%);
- women (71%);
- frequent users (73% of those visiting five or more times in the past year); and
- patrons of the children's theaters (76%)

Our survey did not include persons under 16 years of age, but as described in our visitor profiles, many visitors include families. In 1984 a survey sponsored by Seattle's Mayor Royer and Kidsplace was distributed to Seattle school children. The responses represented about 6,800 students, mostly under the age of 15. The survey had the following relationship to Seattle Center.

- 36.8% of the students associated the word "fun" with Seattle Center. This was the number one response for fun.
- 46.8% of the students associated the phrase "the best place in the city to go with my parents" with Seattle Center. This ranked number two.
- 31.2% of the students associated the phrase "my favorite place in the city" with Seattle Center. This also ranked number one.
- 45.7% of the students associated the phrase "my parent's favorite place to go with a child" with Seattle Center. This also ranked number two.
- Other categories where Seattle Center made the top twelve responses were beautiful, smells good, safe, noisy, busy, mysterious, boring, and tiring.

Although other studies' findings are discussed later in this chapter, it is interesting to note that in 1980, respondents did not perceive Seattle Center as a place for families. This type of description was only stated by four percent of the respondents. Since 1980, there have been some significant changes, primarily to Center House. The Children's Museum and two children's theaters have located at Seattle Center since the time of the 1980 study.

Amusement/Entertainment Center (49% said fit "exactly")

Strongest agreement was among:

- less wealthy respondents (59%);
- women (54%); and
- festival attendees (54%)

Educational Center (43% said fit "exactly")

Strongest agreement among:

- Pierce County residents (48%);
- women (50%);
- households with children (50%); and
- people who had never been to the Seattle Center in the past year (52%)
- Seattle Center as an "educational center" did not fit the image of younger people as exactly (38%).

Performing Arts Center (43% said fit "exactly")

Strongest agreement was among

- Kitsap County residents (51%);
- women (47%);
- older respondents (50%);
- more frequent visitors (52%); and
- people who consider the Seattle Center a regional facility (48%)

Understandably, recent performing arts patrons were much more apt to consider the Seattle Center a "performing arts center" (62%).

Community Park (36% said fit "exactly")

Strongest agreement was among:

- less wealthy respondents (44%); and
- Center House visitors (47%)

This description was not as true for sports fans (only 33% "exactly" and 19% "not at all").

Museum/Cultural Center (31% said fit "exactly")

Strongest agreement among:

- less wealthy respondents (37%);
- women (37%);
- older people (43%); and
- children's theaters visitors

Least agreement among:

- residents of King County outside Seattle (24%);
- sports events attendees (29%); and
- Fun Forest visitors (29%)

Visual Arts/Crafts Center (30% said fit "exactly")

Strongest agreement among:

- Pierce County residents (36%);
- less wealthy households (39%); and
- festival attendees (38%)

Least agreement among:

- King County residents outside Seattle (25%); and
- sports enthusiasts (24%)

Meeting and Convention Center (19% said fit "exactly")

Strongest agreement was among:

- Snohomish County residents (24%);
- minorities (28%); and
- of course, meeting or trade show visitors (22%)

OTHER STUDIES

The 1980 study was the only past study to survey the current perceptions of visitors to Seattle Center in 1980. 44% considered Seattle Center to be

a place with a variety of entertainment, 35% saw it as a point of interest, 21% saw it as an educational center, 19% as a cultural center, 18% as a nice grounds/ a place to visit, 15% as an amusement park, 13% as a place for special events, and only 4% as a place for families.

In addition, respondents said they would be likely to bring visitors to Seattle Center because Seattle Center is a landmark or that the Space Needle is there (44%) and has a variety of things to do (17%). Other mentioned reasons include educational/cultural reasons (9%), special events, and amusements. The study also asked what made Seattle Center important, and the top responses of those who thought Seattle Center was important included landmark (31%), variety of entertainment (20%), and educational/cultural (16%).

CHAPTER 6

PERCEPTIONS ABOUT SEATTLE CENTER'S FUTURE

In planning for the future of Seattle Center, we asked survey participants how well the eight descriptions fit their picture of what Seattle Center should be in the future. The responses for the eight descriptions were the following as seen in **Chart 22**. The future Seattle Center as a family activity center was a very strong desire with performing arts and educational centers also ranked very high. Less than 50% of the respondents saw Seattle Center's future as a community park, a visual arts/crafts center and a meeting/convention center.

There were three major changes in the perceptions about Seattle Center and what respondents saw Seattle Center as currently versus what they would like to see in the future. The greatest shifts in perceptions occurred in the descriptions that related to museum/cultural center (20% change), performing arts center (18% change), and an educational center (18% change). Family activity center perceptions increased by 10%. **Table 7** shows a comparison of the current perceptions and future perceptions as well as the percent change.

PERCEPTIONS ABOUT FUTURE FUNCTIONS AT SEATTLE CENTER

Our analysis of respondent characteristics is primarily related to the groups of respondents who answered in the "exactly" category for each description. Other percentages are stated.

The Future as a Performing Arts Center (61% said fit "exactly")

- Within King and Pierce County residents, slightly fewer respondents believed that this description fit exactly, 57% to about 67% in other counties.
- Women generally felt that this description fit better than men (67% to 56%)

CHART 22

IN THE FUTURE, THE SEATTLE CENTER SHOULD BE A.....

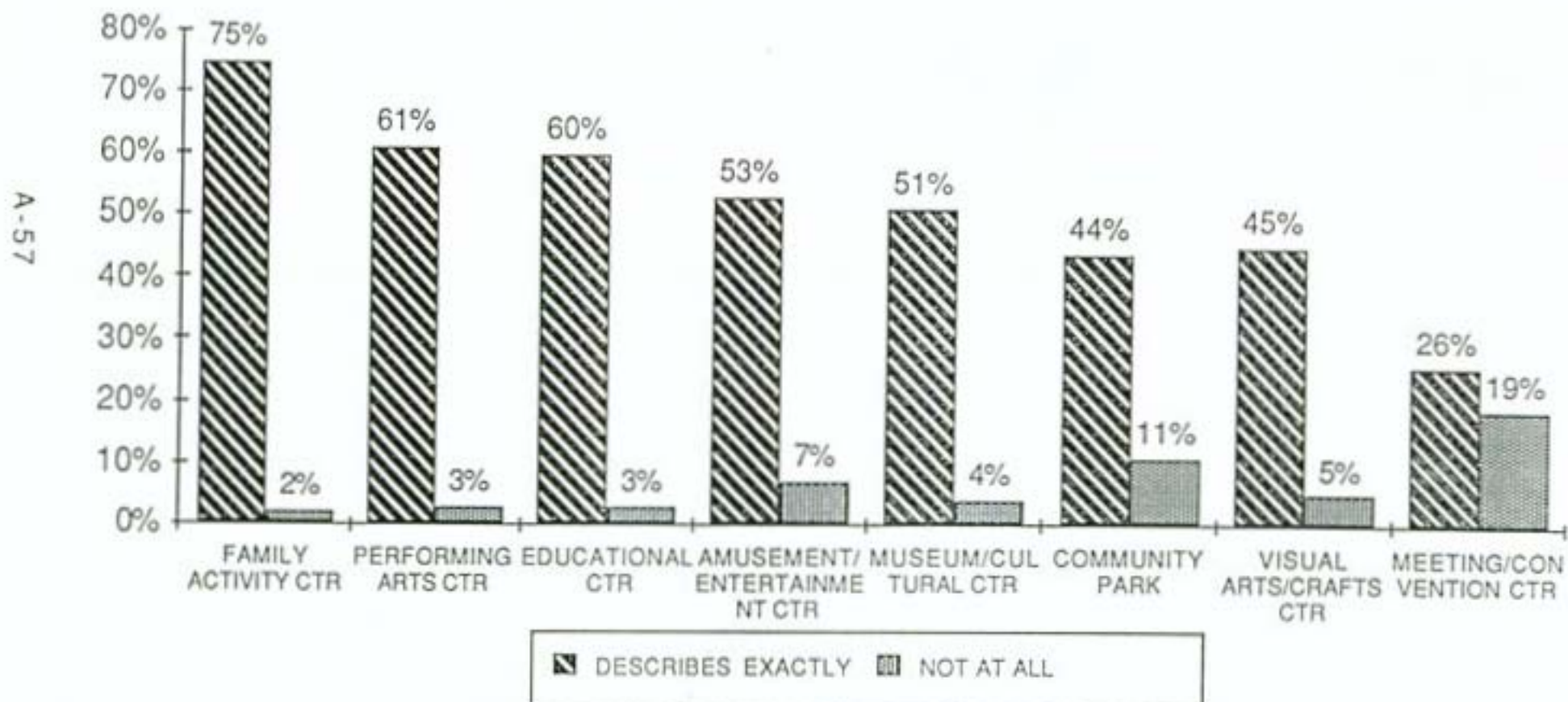


TABLE 7

PERCENTAGE CHANGE IN CURRENT AND FUTURE PERCEPTIONS BY FUNCTION

Performing Arts Center

| Response | Current % Perception | Future % Perception | Percent Change |
|------------|-------------------------|------------------------|-------------------|
| Not at All | 4 | 3 | -1 |
| Not Well | 18 | 10 | -8 |
| Somewhat | 33 | 25 | -8 |
| Exactly | 43 | 61 | 18 |
| DK | 3 | 2 | -1 |

Family Activity Center

| Response | Current % Perception | Future % Perception | Percent Change |
|------------|-------------------------|------------------------|-------------------|
| Not at All | 4 | 2 | -2 |
| Not Well | 8 | 4 | -4 |
| Somewhat | 21 | 17 | -4 |
| Exactly | 65 | 75 | 10 |
| DK | 1 | 2 | 1 |

Community Park

| Response | Current % Perception | Future % Perception | Percent Change |
|------------|-------------------------|------------------------|-------------------|
| Not at All | 14 | 11 | -3 |
| Not Well | 25 | 14 | -11 |
| Somewhat | 24 | 29 | 5 |
| Exactly | 36 | 44 | 8 |
| DK | 2 | 2 | 0 |

Museum/Cultural Center

| Response | Current % Perception | Future % Perception | Percent Change |
|------------|-------------------------|------------------------|-------------------|
| Not at All | 5 | 4 | -1 |
| Not Well | 23 | 12 | -11 |
| Somewhat | 38 | 31 | -7 |
| Exactly | 31 | 51 | 20 |
| DK | 3 | 2 | -1 |

Educational Center

| Response | Current % Perception | Future % Perception | Percent Change |
|------------|-------------------------|------------------------|-------------------|
| Not at All | 4 | 3 | -1 |
| Not Well | 16 | 11 | -5 |
| Somewhat | 35 | 24 | -11 |
| Exactly | 43 | 61 | 18 |
| DK | 2 | 2 | 0 |

Visual Arts/Crafts Center

| Response | Current % Perception | Future % Perception | Percent Change |
|------------|-------------------------|------------------------|-------------------|
| Not at All | 5 | 5 | 0 |
| Not Well | 23 | 18 | -5 |
| Somewhat | 38 | 31 | -7 |
| Exactly | 30 | 45 | 15 |
| DK | 3 | 2 | -1 |

Amusement/Entertainment Center

| Response | Current % Perception | Future % Perception | Percent Change |
|------------|-------------------------|------------------------|-------------------|
| Not at All | 6 | 7 | 1 |
| Not Well | 13 | 14 | 1 |
| Somewhat | 30 | 25 | -5 |
| Exactly | 49 | 53 | 4 |
| DK | 2 | 1 | -1 |

Meeting/Convention Center

| Response | Current % Perception | Future % Perception | Percent Change |
|------------|-------------------------|------------------------|-------------------|
| Not at All | 18 | 19 | 1 |
| Not Well | 30 | 28 | -2 |
| Somewhat | 25 | 24 | -1 |
| Exactly | 19 | 26 | 7 |
| DK | 8 | 3 | -5 |

- The 35-55 year old age group was higher than the other two categories (66% to 57%).
- The more a respondent went to Seattle Center the more likely they thought of Seattle Center as a performing arts center. Those that had gone five or more times compared to those that never used Seattle Center in the past year (75% to 58%).
- As expected, 81% of those that attended performing arts events felt that it was a performing arts center. Other groups such as those that attended children's programs, fine arts and crafts events, and the Center House had a high desire to see Seattle Center as a performing arts center. Those that had the lowest response for this description were respondents who said that they had attended sports events.

The Future as a Family Activity Center (75% said fit "exactly)

- 79% of the women saw this role compared to 70% of the men.
- The younger age groups saw this role more than older groups, 79% to 62%.
- Those that had one or more children at home or had young children at home had strong agreement with this role, 81% and 85%, respectively.
- Like performing arts, the more that a respondent went to Seattle Center the higher the percentage of agreement for this role. 82% of those going three or more times agreed with this role compared to only 69% of those who had never gone to Seattle Center during the year.
- 81% of those who perceived that Seattle Center was a regional facility thought this description fit, compared to only 70% of those who thought that Seattle Center was a Seattle facility.
- Those who attend performing and arts and crafts activities were slightly less in favor of this role compared to those who attended children's programs and festivals.

The Future as a Community Park (44% said fit "exactly)

- 52% of those that had a household income of \$25,000 or less compared to 38% of those making more than \$35,000.
- Pierce County residents did not consider this description very appropriate as only 34% of them agreed.
- Those between 35 and 54 years old were slightly less in agreement than the other two groups.
- Those with no children in the home were slightly higher than those with children at home (48% to 40%).
- 51% of those that attended concerts and festivals believed in a park compared to the lowest group of 41% of those attending sports events.

The Future as a Museum and Cultural Center (51% said fit "exactly)

- 57% of the women desired this compared to 46% of the men.
- 59% of the minorities agreed with this compared to 50% of the whites.
- Those that never used Seattle Center and those that used Seattle Center three or more times were slightly higher than the other infrequent users.
- Those that attended children's activities were highest at 62% while those that attended sports events were the lowest at 46%.

The Future as an Educational Center (60% said fit "exactly)

- 69% of the women felt this way compared to 52% of the men.
- Those believing that Seattle Center was a regional facility thought it was an educational center at a 66% rate compared to 57% of those that thought it was a Seattle facility.
- Those that had never used it in the past year had a slightly higher percentage than those who used Seattle Center (66%).

- Those that attended children's activities and attended Center House had the highest rating compared to those attending sports events (67% to 52%). Those who attended the Pacific Science Center were at 63%.

The Future as an Arts and Crafts Center (45% said fit "exactly)

- 53% of women compared to 37% of the men thought that this was future role.
- 53% of the minorities were in agreement compared to 44% of the whites.
- As household income increased, respondents were less likely to feel that Seattle Center should be an arts and crafts center. 53% of those with household incomes under \$25,000 compared to 38% of those with incomes of \$35,000 or more.
- Those that attended Center House programs and festivals had the highest percentage (52%) compared to those that went to sporting events (36%).

The Future as an Amusement and Entertainment Center (53% said fit "exactly)

- Within Snohomish County residents 63% thought of Seattle Center as an amusement and entertainment center.
- As household income increased, respondents were less likely to feel that Seattle Center should be an arts and crafts center. 61% of those with household incomes under \$25,000 compared to 48% of those with incomes of \$35,000 or more.
- 70% of minorities felt that this should be a role compared to 51% of whites.
- The younger age group category of 16 to 34 was much higher than the other age groups (62% to 47%).
- Those that went five or more times to Seattle Center had a slightly higher percentage than other users and non-users at 62% compared to 47% for non-users.

- Among those that attended in the past year Fun Forest users had the highest percent at 63% compared to those that went to performing arts at 49%.

The Future as a Meeting and Convention Center (26% said fit "exactly")

- 33% of minorities compare to 25% of whites.
- Those that never used Seattle Center tended to be slightly higher than users at 34%, but as use increased there was a very slight increase in the percentage who thought of Seattle Center as a meeting and convention center.
- Those attending meeting, convention or trade show activities had the highest percentage at 30%.

OPINIONS ABOUT SUGGESTED IMPROVEMENTS TO SEATTLE CENTER

As we discussed ideas and needs with Seattle Center officials and various user and tenant organizations, several potential improvements were discussed and identified. **Chart 23** shows the opinions of the respondents. The improvement that rated the highest for the "very much " category was more lighting and security. Other improvements with 50% or more in the very much category were a monorail park and ride, more cultural exhibits, more performing arts, and a children's play area.

Other miscellaneous improvements were mentioned and these can be found on **Table 8**. Highest among those improvements was more and cheaper parking.

Ice Skating Rink (37% said "very much")

- A slightly higher proportion (45%) of Kitsap County respondents favored the ice rink compared to other county's residents.
- Those that had one or more children in the home had a higher percentage response at 42% compared with 34% of those with no children.
- Those that attended sporting events had the highest percentage 45% while performing arts had the lowest 36%.

CHART 23

RATINGS FOR SEATTLE CENTER IMPROVEMENT
SUGGESTIONS

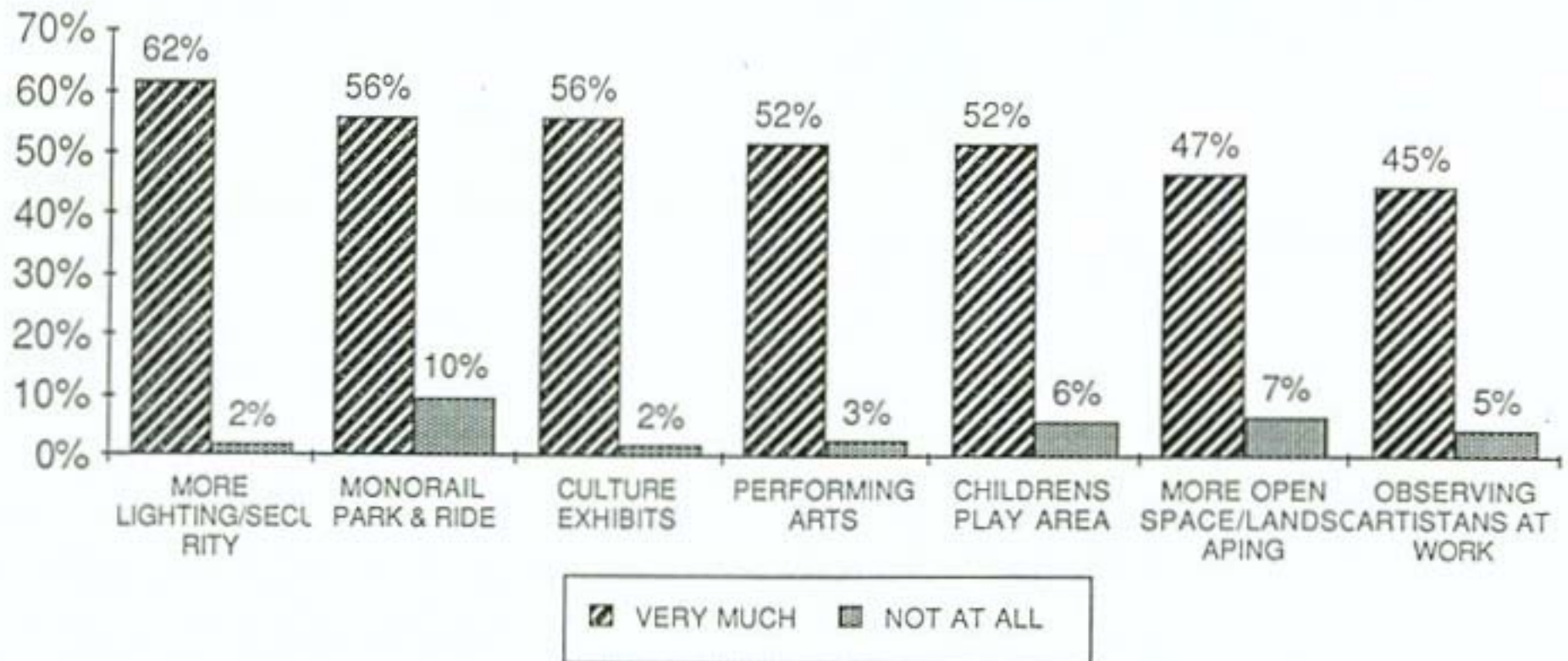


CHART 23
(Continued)

RATINGS FOR SEATTLE CENTER IMPROVEMENT SUGGESTIONS
- Continued from previous page -

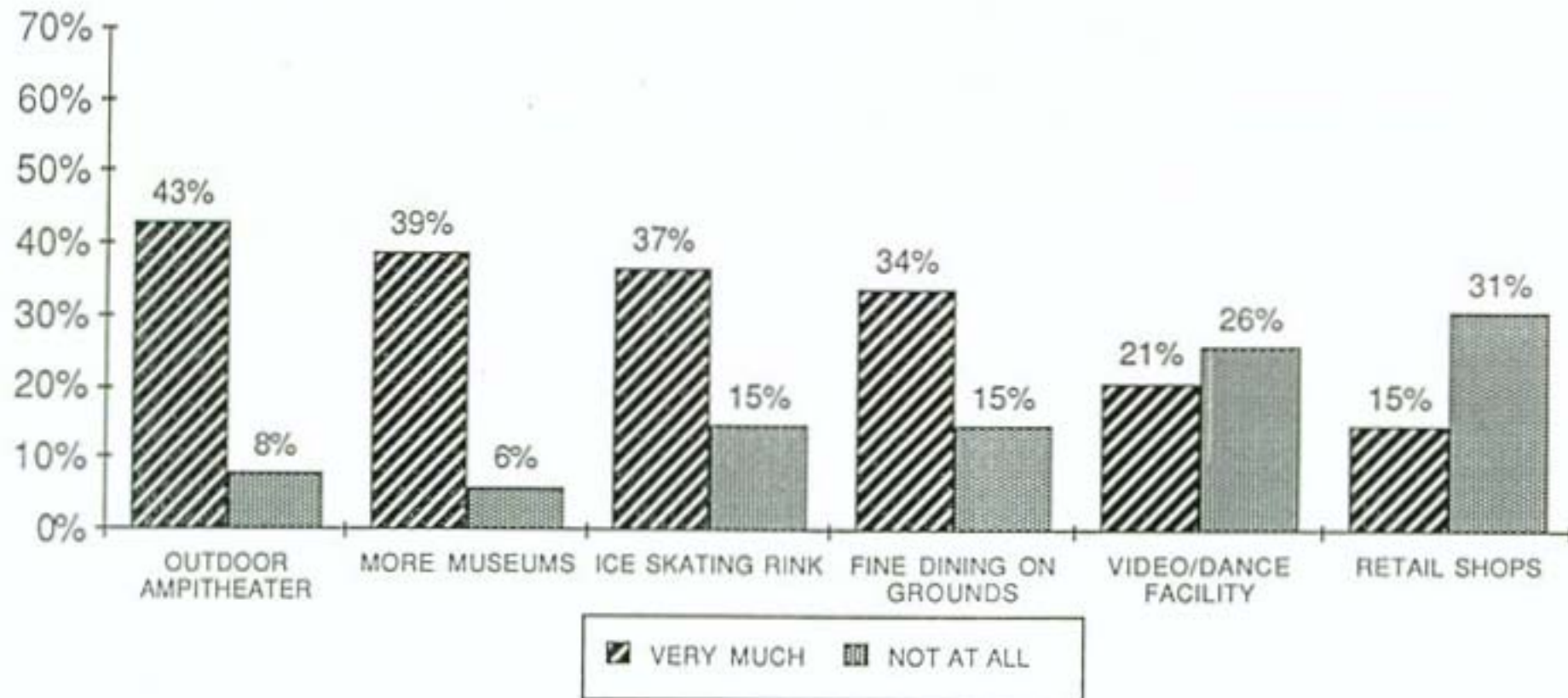


TABLE 8

MISCELLANEOUS IMPROVEMENTS TO SEATTLE CENTER
- Total Sample -

TOP MENTIONS

| | |
|--|----|
| More / cheaper parking | 7% |
| Disney management involvement | 5 |
| More family / children - oriented activities | 4 |
| More rides / improvements to Fun Forest | 4 |
| Reduced crime | 3 |
| General renovation | 3 |
| Miscellaneous suggested activities | 3 |
| More grassy / park - like areas | 2 |
| Other physical enhancements | 2 |
| More concerts | 2 |
| Other new things | 2 |
| More publicity | 2 |
| Less expensive / free events | 2 |

Outdoor Amphitheater (43% said "very much")

- Seattle respondents had a slightly higher proportion among themselves to other counties' residents.
- Those that had household incomes of less than \$25,000 that this was a better idea than those that had incomes of \$35,000 or more (48% to 40%).
- 48% of those in the 34-54 age group liked the idea compared to only 34% of those 55 and older
- Those attending concerts had the highest percentage 53% while those attending performing arts had the lowest, 42%.

A State of the Art Video and Dance Facility (21% said "very much")

- Kitsap County had the highest proportion of respondents in favor with 32% while King County respondents had the lowest percentage support and the highest not at all response, (30%).
- There was a large difference between minorities and whites 34% for minorities compared to 20% for whites.
- As household income increases the general trend is that there is less support. Those household incomes under \$25,000 wanted the facility at a 25% rate compared to 17% of those with income \$35,000 and over.
- 27% of those in the 16-34 age group compared to the other age groups at 17%.
- Those with no children thought that this is a better ride than those with children at home, (24% to 16%)
- As the number of visits increased during the year, there was more support for this facility. Those that never used Seattle Center responded at a 12% while those that used Seattle Center five or more times favored the dance facility at a rate of 28%.

- Those that attended performing arts had the lowest rate while those that attended concerts and festivals and visited the Space Needle had the highest support at 27%. Those that attended children's programs ,Center House, and arts and crafts had a high of 32% favoring the not at all category.

A Children's Play Area (52% said "very much")

- 58% of the women favored the area compared to 47% of the men.
- Those that were younger felt more strongly about a play area compared to those in the 55 and older group (59% to 44%)
- Those that had young children and had one or more children in the home favored the facility at about a rate of 64%-66%.
- Those attending performing arts activities were the least supportive of the idea at 49% compared to those who attended children's programs at 65%.

Monorail Park and Ride (56% said "very much")

- At 70%, Kitsap respondents very much supported a monorail park and ride. Seattle and King County respondents were at lower percentages of support for this type of improvement.
- Women favored this idea at 61% compared to 51% of the men.
- Minorities were higher than whites at 67% to 55%.
- The more frequent visitors had a lower percentage supporting this idea compared to those who have never used the facility in the past year or who have used it only once.
- Those that attended the Space Needle had the highest percentage at 58% compared to the lowest which involved those attending performing arts at 44%

More Open Space and Landscaping (47% said "very much")

- 59% of the minorities were in favor of this idea compared to 46% of whites.

- The older age groups had less of a desire for more open space. The 16-34 year old group had a response rate of 51% compared to only 40% of those 55 and older.

More Lighting and Security (62% said "very much")

- Women had a higher agreement level for this compared to men 69% to 56%.
- Those in the older age category also had a slight tendency to want more of this improvement 65% to 59% for other age groups.
- 70% of those that had not attended Seattle Center during the past year wanted to see this improvement along with those who had used it once. Those that had used more than once were in the 57%-59% range.
- Those that attended the Space Needle and Center House programs had the highest percentage rate, 66% and 65%, respectively, compared to the lowest percentage of 55% for those who attended performing arts.

Retail Shops (15% said "very much")

- The support for retail shops decreases as the income category increases. Those in the category \$35,000 and more had not at all rate of 31% compared to a 25% rate for those with \$25,000 or less.
- Those that attended the Fun Forest had the highest support for retail shops at 17% while the lowest were those who attended arts and crafts and performing arts activities. 46% of those attending performing arts did not want to see retail at all.
- 4% of minorities liked the idea compared to only 12% of whites.

Fine Dining (34% said "very much")

- 49% of minorities favored this idea while only 32% of whites favored this idea.
- Those that went to sporting events had the highest percentage at 37% compared to those who attended performing arts at 30%.

Observing Artisans at Work (45% said "very much")

- Women had a higher percentage rate at 49% compared to 40% of the men.
- Those attending Center House programs had highest percentage at 52% compared to the lowest percentage of 38% from those attending the Space Needle.

More Cultural Exhibits (56% said "very much")

- Women favored this idea 61% compared to 50% of the men.
- The older age categories had a slightly higher percentage than those in the 16-34 age group. The 35-54 age group had the highest percentage at 63% while the younger age group was at 47%.
- Those that attended Seattle Center only once had a lower support rate at 45%, but the highest rate was for those that never used Seattle Center in the past year, 61%.
- Those that attended children's programs had the highest percentage at 69% compared to those who went to sporting events who had the lowest percent, 50%.

More Performing Arts (52% said "very much")

- 61% of those in Snohomish County desired more performing arts compared to the lowest, 45%, in Pierce County.
- The 35-54 age group had a slightly higher desire for more performing arts at 57%.
- As visits increase, those that attended Seattle Center five or more times responded at 62% compared to those that had attended less, 42%-49%. Those never using Seattle Center in the past year rated this idea at 55%.
- Those attending performing arts activities wanted even more activities by 64% compared to those who went to sporting events at 50%.

More Museums (39% said "very much")

- Those who had never used Seattle Center during the past year were at a higher support level, 49%, compared to the range for those that went to Seattle Center (31% to 36%).
- Those attending children's activities had the highest percent, 43%, while those who attended sporting events and the Space Needle had the lowest percent, (30%).

OPINIONS ABOUT THREE SEATTLE CENTER FACILITIES

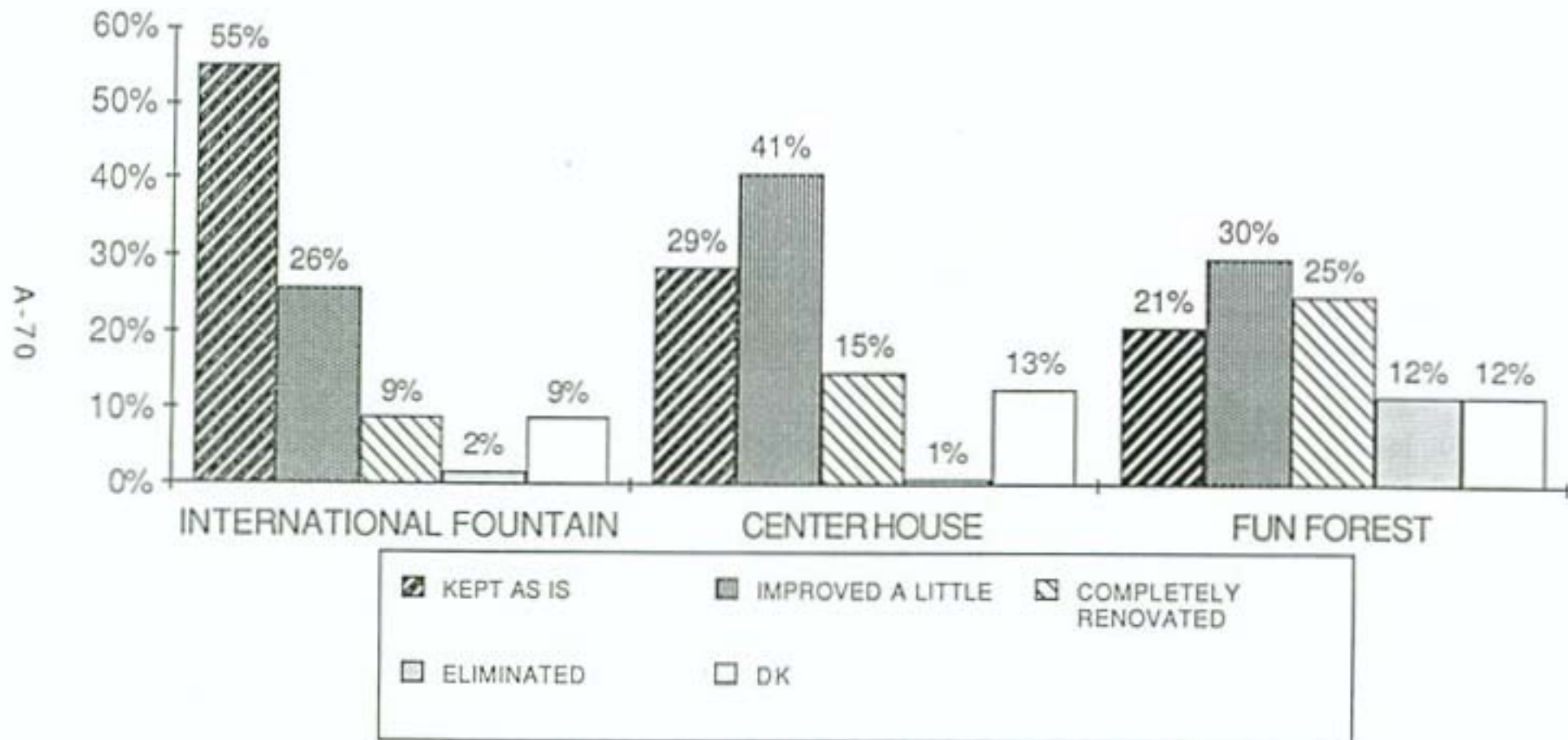
For some specific facilities we asked whether they should be kept as is, improved, renovated, or eliminated. **Chart 24** shows the responses for the Center House, the Fun Forest, and the International Fountain. 55% of the respondents said to "keep as is" the International Fountain compared to 29% for the Center House, and 21% for the Fun Forest. In addition we asked for any suggestions the respondents had concerning improvements for Seattle Center. Table 8 shows these responses with more and cheaper parking rated as the most often mentioned improvement.

The Future of Center House

- 35% of the men had a desire to keep it as is while women had a greater desire to improve.
- The older the age group the greater the desire to keep the Center House as is. 43% of those in the 55 and older group wanted the Center House as is, while only 29% of the 16-34 year old group desired this.
- Those who attended performing arts activities had the highest percent age, 23%, to renovate the the Center House, while those attending concerts had the highest percentage, 27%, to keep it as is.
- Those that attended Center House programs had the lowest desire to keep the facility as is, 19%. 53% of these people said to improve it while 55% of those attending children's activities said to improve it. Two children's theaters and the Children's Museum are in the Center House.
- Those that attended the Pacific Science Center had the highest percentage to say keep Center House as is, 28%.

CHART 24

FUTURE OF SOME EXISTING STRUCTURES



The Future of the International Fountain

- 56% of the whites supported keeping the fountain as is while 43% of the minorities supported it. 39% of the minorities believed that it should be improved compared to 24% of whites.
- The older the age group the higher the desire to keep the fountain as is. those in the 16-34 year old category were at 52% while 55 and older were at 64%. Those attending meetings and conventions had the highest percent 37%, for improvement along with those who attended children's activities at 33%.

The Future of the Fun Forest

- There is a slight trend that the higher the income category the less one supports keeping the Fun Forest as is.
- The younger age groups favor improving and renovating the facilities much more than the 55 and older age group. Those in the 16-34 age group only favored keeping the facilities as is at a 16% rate while they supported improvement and renovation at 35% and 33% respectively. The 35-54 year old group did have the highest percentage, 17%, to eliminate the facilities.
- Those that attended Seattle Center only once had a high improvement percentage, 41%. Those that used Seattle Center five or more times had a slightly higher renovation percentage, 34%.
- Those that attended performing arts activities had the highest percent for elimination, 19%. Those that used the Fun Forest had the highest improvement rate at 38%.

Other Studies

Other studies have also asked for comments or suggested improvements to Seattle Center. In addition to this survey, one improvement that is always cited by past studies as a problem or suggestion is parking. In the 1985 study, parking was mentioned by 7% of the respondents. Concerns expressed about parking included that parking was too expensive, more was needed, and more street parking was needed. As the use of Seattle Center increased the more critical respondents were about parking. The 1983 study found that 16% of the visitors commented about parking. The

1980 study found that almost 40% had problems with parking. 22.4% of those citing parking problems said parking was too expensive/no free parking, 20% said it takes too long/can't park close, 23% said there not enough spaces, and 25% said there were more than one event at Seattle Center. Congestion and traffic were also cited (8%). A 1984 Pacific Science Center study also found that more people would visit if it did not seem to be such a problem to find parking. Parking was considered to be difficult to find and expensive.

Other improvements or problems that were mentioned in these past studies included expensive prices, improved maintenance and security, and improved facilities such as the Fun Forest. The 1985 study mentioned the following: prices were too expensive, especially for food, the monorail, Space Needle, Pacific Science Center, and Fun Forest; more entertainment/events/activities such as concerts and winter activities, improved facilities such as more Fun Forest rides and an improved Fun Forest environment, improved maintenance, and improved safety/security. The 1983 study mentioned maintenance, price complaints, security/safety, information and services/amenities. The 1980 study mentioned better maintenance/cleanliness, improved rides, better, less costly food, and more educational activities.

CHAPTER 7

THE GENERAL TOURIST AND CONVENTION MARKETS

In the previous chapters, we discussed the regional and local visitor market and the characteristics and perceptions of that particular market. Although Seattle Center has been primarily concerned with meeting the needs of regional and local residents, another market does exist for Seattle Center. As noted in our survey, 18% of the respondents had out-of-town visitors in their group. Besides these out-of-town visitors who may be visiting friends and relatives, there are those visitors who just come to Seattle to vacation, sightsee and shop. Previous surveys done by various attractions on the Seattle Center grounds indicate that during the summer, a large number of tourists are attracted to Seattle Center facilities.

As part of our survey, we met with officials from the Seattle-King County Visitors and Convention Bureau, the Washington State Department of Trade and Economic Development, and the Washington State Convention and Trade Center. From our discussions with these officials, we found that there are very few specific studies that relate to the Seattle visitor market and the specific attractions and reasons for coming to Seattle Center. There are, however, state-wide studies which give us an indication about the Seattle tourist market.

Surveys done by Seattle Center, the Space Needle, and Pacific Science Center found a high percentage of visitors who are from outside of the Puget Sound area. In a study conducted for Seattle Center in 1985, 20% of the visitors were from outside of Western Washington. A more recent Space Needle study conducted in the summer of 1987 found that 67%-80% of those visiting the Space Needle attractions were out of town visitors. A 1985 Pacific Science Center study found that 44% of the visitors were from outside of western Washington.

In addition to the local surveys, the Department of Trade and Economic Development has done several surveys using information from its visitor information centers and requests for information about the state. These studies show the following about the visitor market, particularly those that request information about the state.

- A 1986 survey of data from visitor information centers throughout the state showed that 20% had a destination of Seattle-King County; 53% had a party size of two persons; 22% stayed one week or more

while 38% stayed one week or less; 38% stayed at campgrounds with another 32% staying at hotels; and 50% came to sightsee, vacation and shop while another 47% came to see friends and relatives.

- A survey of the downtown Seattle visitor information center showed that 39% had a destination for Seattle/King County; 24% were by themselves while another 37% were with somebody else; 29% stayed one week or more while 45% stayed one week or less; 56% stayed at hotels/motels with another 15% staying with friends or relatives; and 40% came to sightsee, vacation, and shop with 13% also coming for business and conventions.
- A 1984 survey following up on persons who requested information on travel to the state found that 75% of the persons came between June and September with 45% arriving by car and 26% by air travel. Once inside the state, however, 84% traveled by car. The average party size was 2.6 persons and the average stay for out-of-state visitors was 9.6 days with the average stay for in state visitors being 17.5 days. Visitors spent an average of \$826 or \$32.42 per person per day. With regard to these visitors and Seattle, 67% visited Seattle and stayed for an average of 4.5 days. The most popular attractions were the ferry system and the Space Needle. 54% visited the ferry system while 39% visited the Space Needle. The survey also stated that 48% gravitated toward Seattle Center. First time visitors were more likely to visit Seattle Center as well as other attractions such as Mount Rainier.
- According to the Department of Trade and Economic Development, the Space Needle, Pacific Science Center, and the Seattle Aquarium ranked third, sixth, and seventh, respectively, as western Washington's top attractions in 1986.
- The Space Needle is clearly a focal point for the visitor market. Its 1987 survey showed that 60% came by car, 61% of the visitors to the observation deck were first time visitors, visitors primarily come for the view, and 22% had also visited Pacific Science Center.

A subset of the visitor market are those attending conventions in Seattle. In the past Seattle has been the site of numerous national and regional conventions. The construction of the Washington State Trade and Convention Center will add to the facilities available for such events. Convention Center studies show that the facility can expect to obtain by 1992 1.5% of the overall national mid-size convention and trade show

market. According to the study the convention center will accommodate approximately 87% of all national conventions and trade shows.

Recent reports show that the convention center has booked 155 organizations into the new facility for the period 1988-1997. It is estimated that the existing bookings represent \$391 million in delegate expenditures, more than 1,498,000 room nights, and estimated tax revenue of more than \$28 million. The estimated number of delegates is 1.1 million for the ten year period.

The types of delegates and conventions represent the following:

- Health care field (35%),
- Trade, business, and commercial organizations (35%),
- Educational organizations (9%), and
- Others including religious, governmental, scientific, agricultural, athletic, etc. (21%).

APPENDIX A-I

APPENDIX A-I

PETER MOY & ASSOCIATES
SEATTLE CENTER - FINAL
JANUARY 1988

RESPONDENT # _____

TELEPHONE: _____

DATE _____

INTERVIEWER _____

ID # _____

Hello, my name is _____ from Peter Moy and Associates a private consulting firm in Seattle. We are conducting a public opinion survey about the future of the Seattle Center. To start off, I have a chart to help me select a person randomly from your household. I'll need to ask you two questions so I can determine which person should be interviewed.

A. First, how many persons 16 years or older live in this household, counting yourself?

1= ONE ("Then I need to interview you")
(RECORD B = 0 IF SPEAKING TO MAN
B = 1 IF SPEAKING TO WOMAN
SKIP TO Q.1

2= TWO
3= THREE
4= FOUR OR MORE
REFUSED - THANK AND TERMINATE

B. How many of them are women?

0= NONE
1= ONE
2= TWO
3= THREE
4= FOUR OR MORE
REFUSED - THANK AND TERMINATE

C. I need to speak to the (oldest/youngest person 16 or older) who is a (woman/man) in your household. Is he/she available?

IF UNAVAILABLE, ARRANGE FOR A CALLBACK:

Could you please tell me that person's first name?

WRITE FIRST NAME HERE: _____

When would be a good time to reach (PERSON)?
WRITE DOWN CALLBACK TIME AND DAY AND THANK PERSON.
WRITE RESPONDENT NUMBER, PHONE NUMBER, AND RESPONDENT ID AT TOP OF CALL RECORD SHEET.

WHEN YOU GET TO THE DESIRED RESPONDENT: REINTRODUCE YOURSELF IF NECESSARY

RECORD START TIME (Hr/min) ____:

Hello, my name is ____ from Peter Moy and Associates. We are conducting a public opinion survey about the future of the Seattle Center.

1. First, including yourself, has anyone in your household gone to Seattle Center in the past 12 months?

1= YES

NO - PROBE: Have you, yourself, ever been to the Seattle Center?

2= YES

3= NO

4= DON'T RECALL

]

SKIP TO Q.16

]

5= DON'T KNOW/REFUSED

2. How many times have you, yourself, gone to the Seattle Center in the past year?

____ RECORD ACTUAL NUMBER (1 - 10+) ASK Q.3

0 = 0 TIMES/NEVER]

99 = DK/REFUSED]

SKIP TO Q.16

3.. Would you say that you go to the Seattle Center more often in the . . . (READ 1-4)

1= winter

2= spring

3= summer, or

4= fall?

5= DON'T KNOW/REFUSED

4. In general, thinking of all the times you have been to Seattle Center why do you usually go there?

The next questions are only about your MOST RECENT VISIT to the Seattle Center.

5. During which month did you LAST go to the Seattle Center? (DO NOT READ) IF RESPONDENT SAYS SEASON; "PICK A MONTH"

- 1= JANUARY 1987
- 2= FEBRUARY 1987
- 3= MARCH 1987
- 4= APRIL 1987
- 5= MAY 1987
- 6= JUNE 1987
- 7= JULY 1987
- 8= AUGUST 1987
- 9= SEPTEMBER 1987
- 10= OCTOBER 1987
- 11= NOVEMBER 1987
- 12= DECEMBER 1987
- 13= JANUARY 1988
- 14= DON'T KNOW/REFUSED

6. The last time you went to the Seattle Center, what was the MAIN purpose of your visit? What other things did you do at the Center?

MAIN:-----

OTHER:-----

7. That last time you went, did you get to the Seattle Center by . . . (READ 1-6)

- 1= car
- 2= bus
- 3= taxi
- 4= the monorail
- 5= another type of vehicle, or
- 6= did you walk all the way?
- 7= DON'T KNOW/REFUSED

8. Including yourself, how many people total were in your group the last time you visited the Seattle Center? PEOPLE WHO WENT TOGETHER

_____ (IF ONLY ONE PERSON IN GROUP SKIP TO Q10)

9. Were any of these people visiting you from out of the Puget Sound area?

- 1= YES
- 2= NO
- 3= DON'T/REFUSED

10. How long did you stay at the Seattle Center on your last visit? Was it..... (READ 1-4)

- 1= less than an hour
- 2= one to two hours
- 3= two to three hours
- 6= three to four hours, or
- 7= more than four hours?

5= DON'T KNOW/REFUSED

11. Not including tickets or admission fees for events, about how much money did (you/your group) spend that last time? (include parking - METERED OR LOT) Was it . . .
(READ 1-6)

- 1= None
- 2= less than \$10
- 3= \$10 to \$20
- 4= \$20 to \$30
- 5= \$30 to \$50
- 6= more than \$50?
- 7= DON'T KNOW/REFUSED

12. Other than Seattle Center, what places in Seattle did you visit during that same trip?

13. Next, I'm going to read a list of events and attractions at Seattle Center. Please tell if you have gone to the Seattle Center for each in the past 12 months.

| | YES | NO | DK/REF |
|---|-----|----|--------|
| a. performing arts including Opera, Ballet, Symphony, Intiman, Seattle Rep | 1 | 2 | 3 |
| b. music concerts or live performances | 1 | 2 | 3 |
| c. childrens theater or museum | 1 | 2 | 3 |
| d. special programs at the Center House | 1 | 2 | 3 |
| e. festivals such as: Bumbershoot, Folk Festival, or Bite of Seattle | 1 | 2 | 3 |
| f. meetings or conventions | 1 | 2 | 3 |
| g. trade or consumer shows | 1 | 2 | 3 |
| h. a Sonics game | 1 | 2 | 3 |
| i. any other sports events | 1 | 2 | 3 |

14. Did you visit any of the following places at the Seattle Center in the past 12 months?

| | YES | NO | DK/REF |
|--|-----|----|--------|
| a. Pacific Science Center | 1 | 2 | 3 |
| b. Fun Forest Amusement Park | 1 | 2 | 3 |
| c. Space Needle | 1 | 2 | 3 |
| d. the Center House | 1 | 2 | 3 |
| e. Seattle Art Museum Pavillion at the Seattle Center | 1 | 2 | 3 |
| f. Pacific Art Center | 1 | 2 | 3 |
| g. Northwest Craft Center or Pottery Northwest | 1 | 2 | 3 |
| h. the International Fountain | 1 | 2 | 3 |
| i. the Monorail | 1 | 2 | 3 |

15. What OTHER facilities did you visit or things did you do in the Seattle Center during the past 12 months?

16. Why have you NOT visited the Seattle Center more often?

IF RECALL HAVE GONE IN THE PAST 12 MONTHS GO BACK TO Q.1
AND CORRECT RESPONSE

17. What do you like best about the Seattle Center? (ONE ANSWER
ONLY - CLARIFY)

18. In general, do you think of the Seattle Center more as a
regional facility or as a city of Seattle facility? (DO NOT READ)

- 1= MORE AS A REGIONAL FACILITY
- 2= MORE AS A CITY OF SEATTLE FACILITY
- 3= DON'T KNOW/REFUSED

19. The Seattle Center is many things to many people. As I read the following descriptions, tell me how well you think each one describes the Seattle Center. We'll use a scale from 1 to 4, where 4 means the description fits exactly, and 1 means it does not describe the Seattle Center at all, in your opinion. (START AT ROTATION MARK)

The Seattle Center is . . .

- - - - DESCRIBES - - - -

| | EXACTLY | | NOT AT ALL | | DK |
|--|---------|---|------------|---|----|
| [] a. a performing arts center | 4 | 3 | 2 | 1 | 5 |
| [] b. a family activity center | 4 | 3 | 2 | 1 | 5 |
| [] c. a community park | 4 | 3 | 2 | 1 | 5 |
| [] d. a museum/cultural center | 4 | 3 | 2 | 1 | 5 |
| [] e. an educational center | 4 | 3 | 2 | 1 | 5 |
| [] f. a visual arts/crafts center | 4 | 3 | 2 | 1 | 5 |
| [] g. an amusement/entertainment center | 4 | 3 | 2 | 1 | 5 |
| [] h. a meeting and convention center | 4 | 3 | 2 | 1 | 5 |

20. Now I'm going to go through the same list. This time, please tell me how well each description fits your picture of what the Seattle Center should be in the future. Use a 4-point scale, where "4" means the descriptions fits exactly and "1" means it does not describe your idea of the future of the Seattle Center at all. (START AT ROTATION MARK)

| | EXACTLY | | NOT AT ALL | | DK |
|--|---------|---|------------|---|----|
| [] a. a performing arts center | 4 | 3 | 2 | 1 | 5 |
| [] b. a family activity center | 4 | 3 | 2 | 1 | 5 |
| [] c. a community park | 4 | 3 | 2 | 1 | 5 |
| [] d. a museum/cultural center | 4 | 3 | 2 | 1 | 5 |
| [] e. an educational center | 4 | 3 | 2 | 1 | 5 |
| [] f. a visual arts/crafts center | 4 | 3 | 2 | 1 | 5 |
| [] g. an amusement/entertainment center | 4 | 3 | 2 | 1 | 5 |
| [] h. a meeting and convention center | 4 | 3 | 2 | 1 | 5 |

21. Is there anything else you would like to see as part of the Seattle Center in the future?

22. The following are some suggestions for improving the Seattle Center. As I read each one, tell me whether you would like to see this at the Seattle Center "very much," "somewhat," "not very much," or "not at all. (START AT THE ROTATION MARK)

| | VERY MUCH | SOMEWHAT | NOT MUCH | NOT AT ALL | DK |
|--|--------------|----------|-------------|------------------|----|
| [] a. ice skating rink | 4 | 3 | 2 | 1 | 5 |
| [] b. outdoor amphitheater | 4 | 3 | 2 | 1 | 5 |
| [] c. state-of-the-art video and dance facility | 4 | 3 | 2 | 1 | 5 |
| [] d. children's play area | 4 | 3 | 2 | 1 | 5 |
| [] e. monorail park-and-ride lot to downtown | 4 | 3 | 2 | 1 | 5 |
| [] f. more open space and improved landscaping | 4 | 3 | 2 | 1 | 5 |
| [] g. more lighting and security | 4 | 3 | 2 | 1 | 5 |
| [] h. more retail shops | 4 | 3 | 2 | 1 | 5 |
| [] i. more fine dining on the grounds | 4 | 3 | 2 | 1 | 5 |
| [] j. observing artists and crafts persons at work | 4 | 3 | 2 | 1 | 5 |
| [] k. culture exhibits | 4 | 3 | 2 | 1 | 5 |
| [] l. more performing arts | 4 | 3 | 2 | 1 | 5 |
| [] m. more museums | 4 | 3 | 2 | 1 | 5 |

23. The next few questions are about existing structures at Seattle Center. As I read each one, tell me whether you personally think it should be kept as is, improved a little; completely renovated; or eliminated.

| | KEPT AS IS | IMPROVED A LITTLE | COMPLETELY RENOVATED | ELIMI- NATED | DK |
|--|---------------|----------------------|-------------------------|-----------------|----|
| a. Should the Center House be ... | 1 | 2 | 3 | 4 | 5 |
| b. What about the International Fountain? | 1 | 2 | 3 | 4 | 5 |
| c. And the Fun Forest, (AMUSEMENT PARK/RIDES) should it be ... | 1 | 2 | 3 | 4 | 5 |

24. These final questions are to help us group your answers with other people like you. First, which county do you live in?

1= KING - PROBE: IN SEATTLE "CITY LIMITS"]
2= KING - (NOT SEATTLE)] ASK Q.25

3= PIERCE > SKIP TO Q26
4= SNOHOMISH > " "
5= KITSAP > " "
6= REFUSED > " "

25. (FOR KING COUNTY RESIDENTS ONLY)
What is the zip code where you live?

9 8 _ _ _ USE 999 FOR DK

26. Overall, how long have you lived in the Puget Sound area?

_ _ YEARS 00 = LESS THAN 1 YEAR

27. Do you work in downtown Seattle?

1= YES
2= NO
3= REFUSED

28. What is your occupation?

(OPEN QUESTION)

29. Which of these best describes you? (READ 1-4)

1= couple with children, ASK Q.30a and Q.30b
2= couple with no children SKIP TO Q.31
3= single with children, or ASK Q.30a and Q.30b
4= single with no children SKIP TO Q.31
5= REFUSED SKIP TO Q.31

30a. How many children 12 and under are living at home?

30b. How many children 13 to 19 are living at home?

31. What is your race or ethnic background? (DO NOT READ)

- 1= BLACK
- 2= ASIAN/PACIFIC ISLANDER
- 3= NATIVE AMERICAN/INDIAN
- 4= CHICANO/HISPANIC
- 5= WHITE
- 6= OTHER
- 7= REFUSED

32. What is your age? Is it . . . (READ 1-6 ONLY IF NECESSARY)

- 1= 16 to 20 years
- 2= 21 to 34 years
- 3= 35 to 44 years
- 4= 45 to 54 years
- 5= 55 to 64 years
- 6= 65 years or older?
- 7= REFUSED

33. Which of these categories best describes your household's income before taxes for 1987 (READ 1-5)?

- 1= Below \$15,000
- 2= \$15,000 to \$25,000
- 3= \$25,000 to \$35,000
- 4= \$35,000 to \$50,000, or
- 5= \$50,000 and over?
- 6= REFUSED

34. Thank you very much for your time and opinions.
May I get your first name and verify your phone number
in case a supervisor needs to call to verify this interview?

1= YES NAME: _____

PHONE # _____

2= NO

RECORD SEX OF RESPONDENT

- 1= MALE
- 2= FEMALE

RECORD STOP TIME (Hr/min) ____:

RECORD TOTAL TIME _____

APPENDIX A-II

APPENDIX A-II

TABLES

Frequencies of responses are presented to provide the most general indications of opinions and behaviors. Cross tabulations of questions are provided with demographic and other indicators to allow comparisons of categories of responses to two questions. These tables show the extent to which people with similar characteristics are likely to prefer the same policy options; e.g., are older people more likely to report that they have a personal physician than are younger people.

These tables are in the format of x rows by y columns, where x represents the dependent or criterion variable of interest and y is the independent or predictor variable. Percentages are calculated within columns and comparisons made across rows.

All open ended questions have been coded to three levels. Therefore, percentages can sum to more than 100% as respondents were encouraged to give more than one reply. The base for percentaging is the number of respondents, not the number of responses.

Statistical significance is an expression of the probability that the data in a particular comparison is the result of sampling error. Caution is advised in interpreting tables which are not statistically significant at this level of $p < .05$; the relationship apparent in the data may not reliably project to an actual relationship among the responses in the total population. In addition, even statistically significant results may not point to meaningful interpretations, since relationships may be spurious (i.e., both variables are related to a third variable which is causing the effect), or may not have very strong associations.

In general, large sample sizes can produce many statistically significant relationships based on what are actually small differences. Refer to the following margin of error table to calculate statistically significant differences.

MARGIN OF ERROR

All statistics presented in this report are subject to a "margin of error" as indicated in the following table. The table reflects statistical deviation only, based on the assumption of simple random sampling, and furthermore, does not take into account errors in recording or processing of data.

STANDARD ERRORS OF VARIOUS PERCENTAGES
WITH GIVEN SAMPLE SIZE

| Size of Raw Total | 95% or 5% | 90% or 10% | 80% or 20% | 70% or 30% | 60% or 40% | 50% |
|----------------------|-----------------|------------------|------------------|------------------|------------------|------|
| 800 | 1.5 | 2.1 | 2.8 | 3.2 | 3.4 | 3.5 |
| 600 | 1.8 | 2.5 | 3.3 | 3.8 | 4.0 | 4.1 |
| 500 | 2.0 | 2.7 | 3.6 | 4.1 | 4.4 | 4.5 |
| 400 | 2.2 | 3.0 | 4.0 | 4.6 | 4.9 | 5.0 |
| 300 | 2.5 | 3.5 | 4.6 | 5.3 | 5.7 | 5.8 |
| 200 | 3.1 | 4.3 | 5.7 | 6.5 | 7.0 | 7.1 |
| 100 | 4.4 | 6.0 | 8.0 | 9.2 | 9.8 | 10.0 |

How to Read: If the total survey sample is 800 people, and if on a given item 80% (or 20%) gave a certain response, the statistical reliability of that information is plus or minus 2.8%. However, it might be advisable to double this figure (plus or minus 5.6%) giving a more conservative interpretation of these data because the completion rate for this survey does not equal 100% (i.e., not all the qualified contacts resulted in completed interviews).

FIELDING STATISTICS

Seattle Center Telephone Survey

| | | |
|---|-----|------|
| Total Sample | | 3332 |
| Total Contacts | | 2315 |
| Qualified Contacts | | 1205 |
| Completions | 824 | |
| Refusals & Quits | 135 | |
| Respondent Not Available (Four Attempts) | 196 | |
| Survey Not Usable (Computer or Date Entry Errors) | 50 | |
| Not Qualified | | 415 |
| Business | 266 | |
| Other Not Qualified* | 149 | |
| Not Screened (Household Refusals) | | 695 |
| Non-Contacts | | 1017 |
| Disconnected/Non-Working Numbers | 651 | |
| No Answer (Four Attempts) | 366 | |
| Completion Rate = (Completions/Total Contacts) | | 36% |
| Refusal Rate = (Refusals and Quits/Qualified Contacts) | | 11% |
| Overall Refusal Rate (Based on qualified and not screened contacts) = (All refusals and quits/ qualified and not screened contacts) | | 44% |

- * Non-English speaking
Hard of hearing
Moved from area
Over quota for County or gender

APPENDIX A-III

APPENDIX A-III

COUNTY COMPARISONS

COMPARISON: AGE BY COUNTY

Overall the people who participated in the survey fall into similar age groups within counties compared to OMB county estimates. This survey slightly over represents people 35 - 44 and somewhat under represents those 16 - 20.

| | KING | | | PIERCE | | SNOHOMISH | | KITSAP | |
|------------|-------|------|------|--------|--------|-----------|--------|--------|--------|
| | ----- | | | ----- | | ----- | | ----- | |
| | Other | | | | | | | | |
| Age Group | OMB* | Sea | King | OMB | Survey | OMB | Survey | OMB | Survey |
| ----- | | | | | | | | | |
| (15-19) ** | 8% | - | - | 10% | - | 9% | - | 9% | - |
| 16-20 | - | 4% | 6% | - | 5% | - | 5% | - | 6% |
| (20-34) ** | 35% | - | - | 35% | - | 34% | - | 35% | - |
| 21-34 | - | 36% | 35% | - | 39% | - | 34% | - | 36% |
| 35-44 | 19% | 26% | 24% | 18% | 23% | 21% | 27% | 20% | 23% |
| 45-54 | 12% | 11% | 17% | 12% | 16% | 12% | 14% | 11% | 13% |
| 55-64 | 12% | 9% | 11% | 11% | 10% | 11% | 10% | 11% | 14% |
| 65 + | 14% | 12% | 6% | 14% | 6% | 13% | 9% | 14% | 6% |
| No Answer | - | 2% | 1% | - | 1% | - | 1% | - | 2% |
| ----- | | | | | | | | | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

* Source: Washington State Office of Management and Budget, 1985 Estimates

** Census Categories

COMPARISON: RACE BY COUNTY

| Race | KING | | | PIERCE | | SNOHOMISH | | KITSAP | |
|-----------|------|-------|------|--------|--------|-----------|--------|--------|--------|
| | OMB* | Other | | OMB | Survey | OMB | Survey | OMB | Survey |
| | | Sea | King | | | | | | |
| White | 90% | 85% | 94% | 90% | 85% | 97% | 92% | 94% | 93% |
| Black | 4% | 4% | 2% | 6% | 3% | 1% | 0% | 2% | 2% |
| Native Am | 1% | 1% | 0% | 1% | 3% | 1% | 1% | 1% | 1% |
| Asian | 5% | 6% | 3% | 3% | 5% | 1% | 5% | 3% | 2% |
| Hispanic | - | 1% | 0% | - | 0% | - | 1% | - | 0% |
| Spanish | | | | | | | | | |
| Origin*** | 2% | - | - | 2% | - | 1% | - | 3% | - |
| Other | - | 2% | 1% | - | 4% | - | 1% | - | 2% |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

* Source: 1980 Bureau of the Census General Social and Economic Characteristics, Table 184, 49 (404-406)

** Unweighted data

***The Census reports Spanish origin separately and does not include this category with race, and therefore we have identified it separately.

The above table shows that the people surveyed closely approximate the distribution of race within counties. Slight differences are not statistically significant, especially for tables which use the white/non-white classification for the entire number of respondents.

The Washington State Office of Management and Budget shows comparisons of 1980 census and 1984 estimates of overall county population. These numbers indicate that the rate of growth of the Asian population has been higher in Snohomish County compared to King, Kitsap, and Pierce.

COMPARISON: INCOME BY COUNTY

As expected, a comparison of survey household incomes (1987) to 1979 Census household incomes shows the overall increase of salaries over this time period. The patterns across counties are reasonable with Pierce County and Seattle having more lower income households, and King County households (excluding Seattle) having higher incomes.

| | KING | | PIERCE | | SNOHOMISH | | KITSAP | | |
|-------------|---------|------|--------|--------|-----------|--------|--------|--------|--------|
| | ----- | | ----- | | ----- | | ----- | | |
| | Other | | | | | | | | |
| Income | Census* | Sea | King | Census | Survey | Census | Survey | Census | Survey |
| | ----- | | ----- | | ----- | | ----- | | |
| Less than | | | | | | | | | |
| \$15,000 | 35% | 16% | 7% | 43% | 17% | 33% | 11% | 38% | 11% |
| \$15-25,000 | 26% | 21% | 19% | 27% | 25% | 29% | 18% | 29% | 24% |
| \$25-35,000 | 19% | 25% | 18% | 17% | 16% | 21% | 28% | 19% | 22% |
| \$35-50,000 | 13% | 16% | 27% | 9% | 17% | 12% | 26% | 10% | 18% |
| \$50,000 + | 7% | 15% | 24% | 4% | 13% | 5% | 13% | 43% | 14% |
| No answer | - | 7% | 5% | - | 12% | - | 4% | - | 11% |
| | ----- | | ----- | | ----- | | ----- | | |
| | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

* Source: U.S. Bureau of the Census, General Social and Economic Characteristics, Washington 49 (371-373)

Part B

DESCRIPTION AND USE PROFILE OF
SEATTLE CENTER FACILITIES

Part B

DESCRIPTION AND USE PROFILE OF SEATTLE CENTER FACILITIES

A key component of the Phase I study assignment was a comprehensive inventory and analysis of existing facilities at Seattle Center, focusing on current use patterns and potential future use consistent with the nature and physical condition of each facility as well as guidelines set forth in the Mission Statement and associated planning goals. The findings of that analysis are presented in this part of the report, divided into three major sections: an introductory discussion establishing a broad perspective on Seattle Center, followed by an examination of overall use patterns and then a more detailed evaluation of the complex on a facility-by-facility basis.

OVERVIEW OF SEATTLE CENTER

Important in the context of planning for the future of Seattle Center are the basic considerations of regional market strength and the locational attributes of the site. Also essential to the planning process is a review of the Center's existing facility mix, programming, and general financial performance. These various factors are addressed in subsequent paragraphs.

Regional Market Environment

The 74-acre Seattle Center, residual of the highly successful 1962 "Century 21" World's Fair, is located within the heart of Seattle, Washington, one of America's youngest metropolitan areas. The city had a modest beginning in 1852 as a lumber and fishing village of less than 200 souls; twenty years later, it was still a small town with a population of some 3,500. By 1890, however, population had soared to almost 43,000, while by the turn of the century, it stood at more than 81,000. The chief impetus to growth in these early decades was the Yukon Gold Rush, during which thousands of fortune-seekers poured into Alaska and the Yukon Territory via Seattle, changing the face of the city for all time. The Gold Rush spawned demand for a host of goods and services Seattle eagerly provided, which in turn created a thriving labor market that attracted scores of new residents. By 1910, population had risen to 237,000 and employment reached 122,000 jobs.

Although the goldfields were essentially played out by century's end, Seattle's by-then established prominence as a West Coast transportation hub--facilitated by an excellent deep-water harbor--furnished the springboard for continued industrial and commercial development, much of which was ultimately concentrated not only in shipping, but in the aircraft/aerospace sector. Today, the Emerald City is the largest in the Pacific Northwest and the region's leading business center. It remains the principal link between the U.S. mainland and Alaska, with the Port of Seattle still handling the major share of cargoes flowing between the Fiftieth State and the U.S. interior. More recently, Seattle has become a major origin/destination point in U.S. trade with the Far East, reflected in the oft-repeated slogan "Gateway to the Orient."

Recent population trends for Seattle are contained in **Table 1**. As indicated, the two-county metropolitan area has a total current population of approximately 1.8 million, up from 1.4 million in 1970. More than three-fourths of all residents live within King County, with the City of Seattle accounting for about 28 percent of the metropolitan total and 36 percent of the King County total. Growth rates during the 1970s were modest and well below the statewide average, largely the result of job losses associated with infamous "Boeing Bust" that began in the late 1960s and bottomed out in 1971. Population actually declined noticeably between 1970 and 1973, an unexpected turn of events that shook the confidence of a proud community. The situation was facetiously commemorated on a well-publicized billboard notice of the era asking: "Will the last person leaving Seattle please turn out the lights?" By the middle of the decade, however, the exodus was over and the trend was on the upswing again; since 1980, rates of increase have accelerated and now match those of the state overall.

It will be noted that the City of Seattle, in contrast to the metropolitan area as a whole, has consistently lost population over the last 16 years, declining from 531,000 in 1970 to 488,000 by 1986. This trend toward suburbanization is common to many large cities and is a function of several factors, among them increasing inner city crime rates, the decentralization of employment opportunities, urban traffic and parking conditions, and deterioration of the central city housing stock. There is evidence of renewed interest in downtown living, however, particularly among senior citizens and so-called "yuppies" which, in tandem with the efforts of local government to make the city core more "user-friendly," may eventually produce a turnaround in the city's population trend.

The demographic characteristics of metropolitan Seattle are compared with those of other cities of similar size in **Table 2**. Seattle's median household income of \$30,800 annually, as shown, is the second highest among the 10 cities listed (only marginally below Minneapolis), and exceeds the national average by a substantial 25 percent. A median age of slightly more than 32 years in Seattle is nearly identical to the U.S. mean and in the middle of the range for other cities shown. Average household size in Seattle is a comparatively small 2.49 persons, virtually the same as in Denver; among other points of reference, only Tampa reports a lower average at 2.37 persons (which correlates with the exceptionally high median age of 40-plus years in this haven of "empty-nesters"). These various characteristics, in particular the relatively high level of affluence, signal a demographically favorable market environment.

Quantitative measures aside, metropolitan Seattle is also distinguished by an enviable standard of livability. In recent years, it has placed near the top of every list ranking American cities on such factors as recreational opportunities, cultural/educational infrastructure, economic stability, and environmental quality. Most remarkable is the city's strong commitment to the visual and performing arts, which rivals or surpasses that of much larger and much older metropolitan areas. The arts, already flourishing in Seattle by the time of the city's Centennial in 1952, experienced a dramatic expansion over the next two decades. By 1979, for example, the area had more equity theaters per capita than New York, an internationally acclaimed Wagner "Ring" Festival, and a major regional ballet company. Prior to the 1970s, the number of art galleries in Seattle could be counted on the fingers of one hand; today, it is estimated that there

Table 1

POPULATION TRENDS IN THE
SEATTLE METROPOLITAN AREA
1970-1987

| | Total Population (thousands) | | | Average Annual Rate of Change | |
|--|---------------------------------|-------------|-------------|----------------------------------|----------------|
| | <u>1970</u> | <u>1980</u> | <u>1986</u> | <u>1970-80</u> | <u>1980-86</u> |
| City of Seattle | 531 | 494 | 488 | (0.7)% | (0.2)% |
| King County | 1,159 | 1,270 | 1,362 | 0.9 | 1.2 |
| Seattle Metropolitan Area (King and Snohomish counties) | 1,425 | 1,607 | 1,758 | 0.3 | 1.5 |
| State of Washington | 3,413 | 4,130 | 4,479 | 2.0 | 1.4 |

Source: U.S. Bureau of the Census, Washington State Employment Security Department, and Harrison Price Company.

Table 2

**DEMOGRAPHIC COMPARISON OF SEATTLE
AND OTHER SELECTED METROPOLITAN AREAS
1986**

| <u>Metropolitan Area</u> | <u>Total Population (thousands)</u> | <u>Median Household Income</u> | <u>Median Age (years)</u> | <u>Average Households (persons)</u> |
|--------------------------|---|--|-------------------------------|---|
| Minneapolis-St. Paul | 2,323 | \$30,927 | 31.0 | 2.65 |
| Pittsburgh | 2,140 | 24,121 | 35.5 | 2.56 |
| Phoenix | 1,916 | 25,673 | 32.0 | 2.56 |
| Tampa | 1,916 | 21,490 | 40.3 | 2.37 |
| Cleveland | 1,853 | 26,043 | 33.8 | 2.60 |
| Miami | 1,785 | 23,082 | 36.8 | 2.66 |
| SEATTLE | 1,758 | 30,814 | 32.4 | 2.49 |
| Denver | 1,649 | 29,897 | 30.9 | 2.48 |
| Kansas City | 1,525 | 28,349 | 32.3 | 2.66 |
| Cincinnati | 1,419 | 25,727 | 31.7 | 2.68 |
| U.S. Average | 243,212 | 24,632 | 32.2 | 2.71 |

Source: Sales Management, 1987 Survey of Buying Power.

are more than a hundred galleries in the metropolitan area, along with several major museums. The following statement nicely expresses the city's extraordinary accomplishments in this field of endeavor:

"Seattle has long been a national model in its innovative and meaningful use of the arts as part of the lives of its people. The arts in Seattle are not only diverse and vital, but are woven into the very fabric of the cultural, economic and social life of the city."

Nancy Hanks
National Endowment for the Arts

Favorable demographics and superior livability attest to the strength and quality of the Seattle market and provide a solid underpinning for the upgrading and expansion of cultural and entertainment offerings at Seattle Center.

Locational Attributes

Seattle Center is aptly named, for as shown in **Figure 1**, it is indeed located not only in the center of Seattle, but also in the center of the populated coastal districts of the metropolitan area at large. Two major highways, U.S. 99 and Interstate 5, provide access to the site from outlying points to the north and south, while I-5 in turn connects with I-90, the major arterial serving eastern Washington and points beyond all the way to Boston. Principal surface thoroughfares such as Mercer Street, Denny Way, and Broad Street provide the link between the Center and the freeway system, as shown in **Figure 2**. Although the latter routes are often heavily congested, peak commuter traffic hours generally do not coincide with peak visitation periods at Seattle Center (weekends and midday and evenings during the week).

More problematical for the Center than ordinary commuter traffic is the near-gridlock which occurs (most notably on Mercer Street and intersecting "feeders") when mass-attendance events let out and a large number of freeway-bound vehicles pours onto streets not designed to handle traffic of this magnitude. Solutions to what has been dubbed the "Mercer Mess" and other access problems on the periphery of Seattle Center are currently under study by local transportation authorities and are viewed as critical to the future of Seattle Center.

Another, unique mode of access to the site is the Seattle Monorail traversing the 1.5-mile distance between the downtown office/hotel district and Seattle Center. The Monorail has a current annual passenger volume of about 1.25 million, and ridership patterns (to be discussed subsequently) reveal that it is particularly instrumental in transporting downtown employees and tourists to the site. An additional mode of access that has been proposed is an extension of the existing trolley line along the downtown waterfront to Seattle Center which, if implemented, would provide a mutually advantageous link between the waterfront's recreational and commercial attractions and the entertainment and cultural facilities of Seattle Center. Overall, accessibility is considered good, but nevertheless impeded by the aforementioned capacity limitations of streets in the immediate site vicinity.

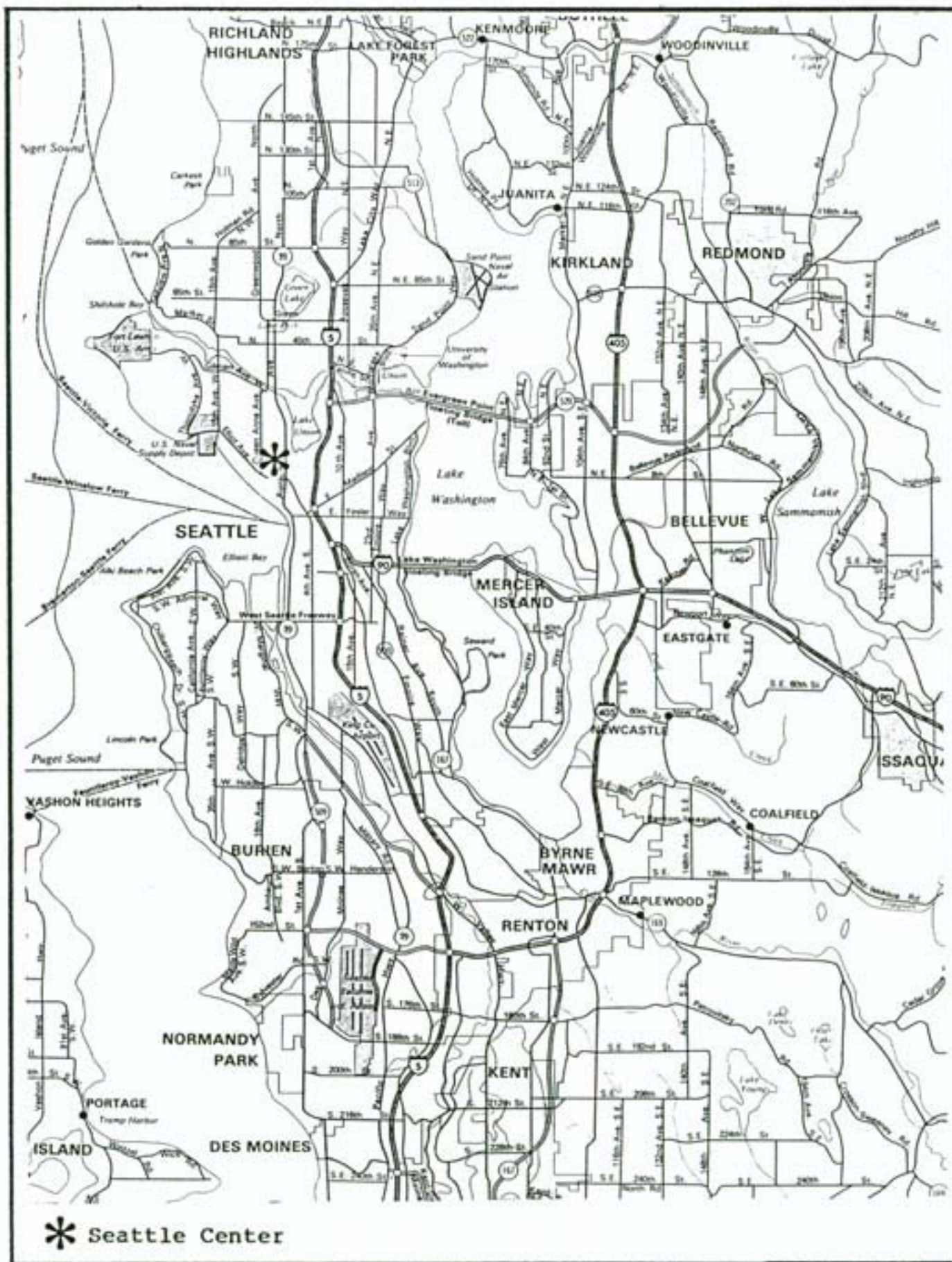


Figure 1

REGIONAL ORIENTATION MAP

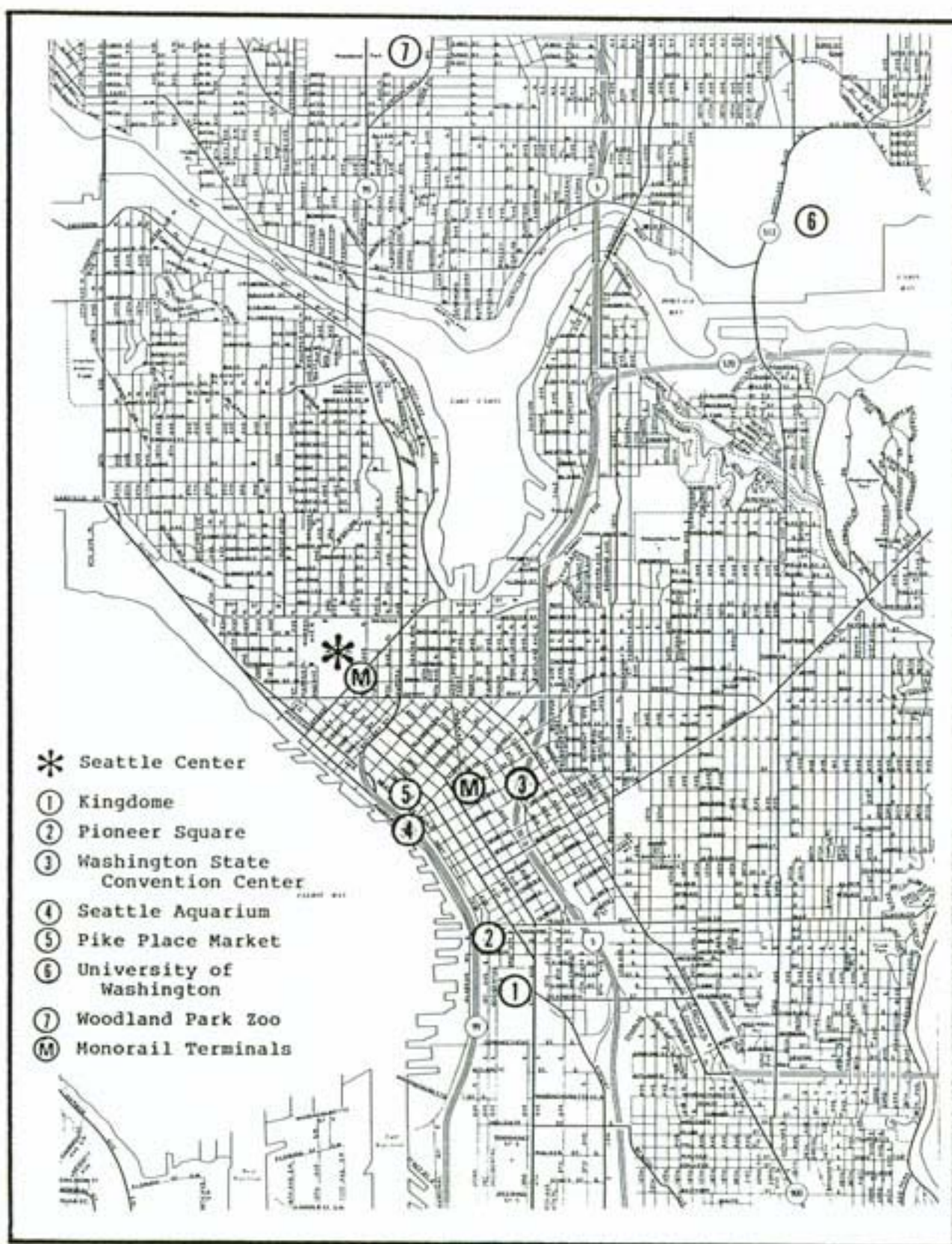


Figure 2

SEATTLE CENTER VICINITY MAP

Figure 2 also depicts Seattle Center's geographic relationship to other major attractions in the downtown area, including the Kingdome, Pioneer Square, Seattle Aquarium, Pike Place Market, and the new Washington State Convention Center to the south and the University of Washington and Woodland Park Zoo to the north. All of these facilities are located within a few miles of Seattle Center and collectively represent a diverse inventory of recreation/entertainment opportunities, most of which, by virtue of the differing experiences offered to the public, are complementary to Seattle Center's programs.

Two of these facilities--the Kingdome and the Washington State Convention Center--on the other hand constitute a competitive presence in the marketplace that must be reckoned with in planning for the future of Seattle Center. Meanwhile, suburban Bellevue located directly east of downtown Seattle across Lake Washington (refer to Figure 1) is currently evaluating plans for an 18,000-seat arena and adjacent convention center and represents further potential competition. The Kingdome competes with Seattle Center's Coliseum for certain sports, convention, and trade show events. Similarly, the new Convention Center, targeted for a late 1988 opening, will compete with several components of Seattle Center, including the Coliseum, Exhibition Hall, Northwest Rooms, and other facilities for a wide variety of convention, meeting, exhibit, and social functions. The Bellevue project, if developed, would be competitive in both sports- and convention/exhibit-related activity.

To a great extent, Seattle Center's ultimate positioning with respect to rental fees, which have historically been lower than its competition, will be a major determinant of the degree of event "leakage" that occurs, and there is the additional subjective factor of long-established loyalties to Seattle Center among selected user organizations that are not easily broken. These issues notwithstanding, heightened competition is inevitable and has important implications on operating philosophy as well as facility redevelopment alternatives to be defined in Phase II of this study assignment.

A final locational factor of interest to this analysis is weather conditions in the Seattle area, which are important in terms of potential to redistribute certain activities over the range of seasons and/or from indoor to outdoor venues. Seattle enjoys a mild maritime climate, as indicated by the data in **Table 3** highlighting temperature and precipitation norms. Directly in the path of Pacific westerly winds, the area is constantly subjected to comparatively warm, moist ocean air, and is normally insulated from cold Arctic and interior winds by the barrier of the eastern Cascade Mountains. Maximum temperatures vary from the mid-40s in winter to the very agreeable mid-70s in summer, while minimum (nighttime) averages extend from lows in the mid-30s in winter to highs in the mid-50s in summer. Rainfall amounts to a substantial 36 inches annually, nearly 75 percent of which occurs between October and March; a moderate three-plus inches characterizes the summer months. Snow, which in Seattle ordinarily occurs as ephemeral flurries or sleet, totals less than nine inches per year. On a 30-year average basis, the subject area typically experiences 153 days of measurable precipitation, equivalent to slightly more than 40 percent of the time. From November through January, rain or sleet can be expected on two out of every three days.

Though part of what is epithetically called the "Great Pacific NorthWET," Seattle's climate is in fact substantially drier than that of many other cities recognized as centers

Table 3

SEATTLE WEATHER CHARACTERISTICS¹

| Month | Mean Temperature (Degrees Fahrenheit) | | Total Precipitation (inches) | | Number of Days With Precipitation Exceeding 0.01 Inches |
|-----------|--|-------------|---------------------------------|------------|--|
| | Minimum | Maximum | Rain | Snow/Sleet | |
| January | 34.7 | 44.7 | 5.17 | 4.0 | 20 |
| February | 36.9 | 50.0 | 3.93 | 0.9 | 16 |
| March | 38.0 | 53.0 | 3.24 | 0.8 | 17 |
| April | 41.8 | 59.0 | 2.41 | T | 14 |
| May | 47.1 | 65.8 | 1.71 | T | 10 |
| June | 52.1 | 70.4 | 1.57 | -- | 9 |
| July | 55.6 | 75.8 | 0.87 | -- | 5 |
| August | 55.3 | 74.5 | 0.88 | -- | 6 |
| September | 51.8 | 69.8 | 1.75 | -- | 8 |
| October | 46.5 | 61.8 | 3.43 | T | 10 |
| November | 40.4 | 51.0 | 5.34 | 0.5 | 18 |
| December | <u>37.4</u> | <u>46.6</u> | <u>5.35</u> | <u>2.4</u> | <u>20</u> |
| Annual | 44.8 | 60.2 | 35.65 | 8.6 | 153 |

¹ Based on normals for the period 1947-1976 as measured in downtown Seattle.
T means trace.

Source: National Oceanic and Atmospheric Administration.

of entertainment/cultural activity: annual rainfall totals 60 inches in Miami, 57 inches in New Orleans, 51 inches in Orlando, and 48 inches in Houston and Atlanta. New York experiences 40 inches of rain each year along with 26 inches of snow; Pittsburgh reports 36 inches of rain and 30 inches of snow, while Minneapolis comes in at 26 inches of rain and 46 inches of snow. Seattle may be "wet" by the standards of Los Angeles, Phoenix, or Dallas, but its climate is clearly more amenable than popularly perceived.

Nonetheless, it is unlikely that a major shift from the Center's present heavy indoor orientation can occur, with outdoor use generally confined to the summer season. Seattle residents may be long-inured to soggy weather (their secret, folklore has it, is webbed feet), but the enjoyment and comfort of their visit is obviously enhanced by protection from the elements. This is not to say that more outdoor use cannot be achieved, even in winter--each January, nearly 2 million people brave frigid temperatures to attend the St. Paul Winter Carnival in Minnesota to revel in goofy fun like golfing in the snow, snowmobile races, and ice-castle building, illustrating that if the magnet is strong enough, the public will respond enthusiastically and may even take perverse pleasure in flouting Mother Nature.

Facility Mix

Some two dozen individual facilities plus a number of parking lots currently comprise Seattle Center, the physical layout of which is presented in **Figure 3**. These components may be grouped into five broad categories according to function and/or operating authority. The first and largest group is public access facilities, or those components made available to user organizations on a rental basis, all of which are owned by the city and administered by the Seattle Center Department of city government. **Table 4** lists these facilities along with their capacity characteristics. The largest single facility, as indicated, is the Coliseum, followed by the Opera House and Arena. The Northwest Rooms, Bagley Wright Theater, Exhibition Hall, and Playhouse comprise a middle group in overall size, while smaller facilities include the NASA Building, Flag Pavilion, Pacific Arts Center (PAC) Hall, Mercer Forum, Center House Conference Center, Center House Theater, Opera House Rehearsal Hall (part of the Opera House), and Poncho Forum (part of Bagley Wright Theater). Rounding out this group is the Mural Amphitheater, the Center's only outdoor performance venue (other than the grounds at large). In the aggregate, these facilities house virtually all of the Center's sports, performing arts, and convention/meeting/exhibit functions.

The second group of facilities is comprised of those under private sponsorship and encompasses the Space Needle--the highly visible symbol of Seattle Center as well as the city at large, the Pacific Science Center, Fun Forest amusement area, Veteran's Hall, KCTS/Channel 9 public television studios, Seattle Children's Museum (located in the basement of the Center House), and High School Memorial Stadium. The Space Needle and Pacific Science Center sites are privately owned and operated and, although they receive continuing strong support from the resident market, they are also the Center's principal tourist draws. Also privately administered is the Veteran's Hall. Privately operated but situated on land or in spaces leased from Seattle Center are the Fun Forest, KCTS studios, and Seattle Children's Museum. Finally, the High School Memorial Stadium site is owned and operated by the local school district.

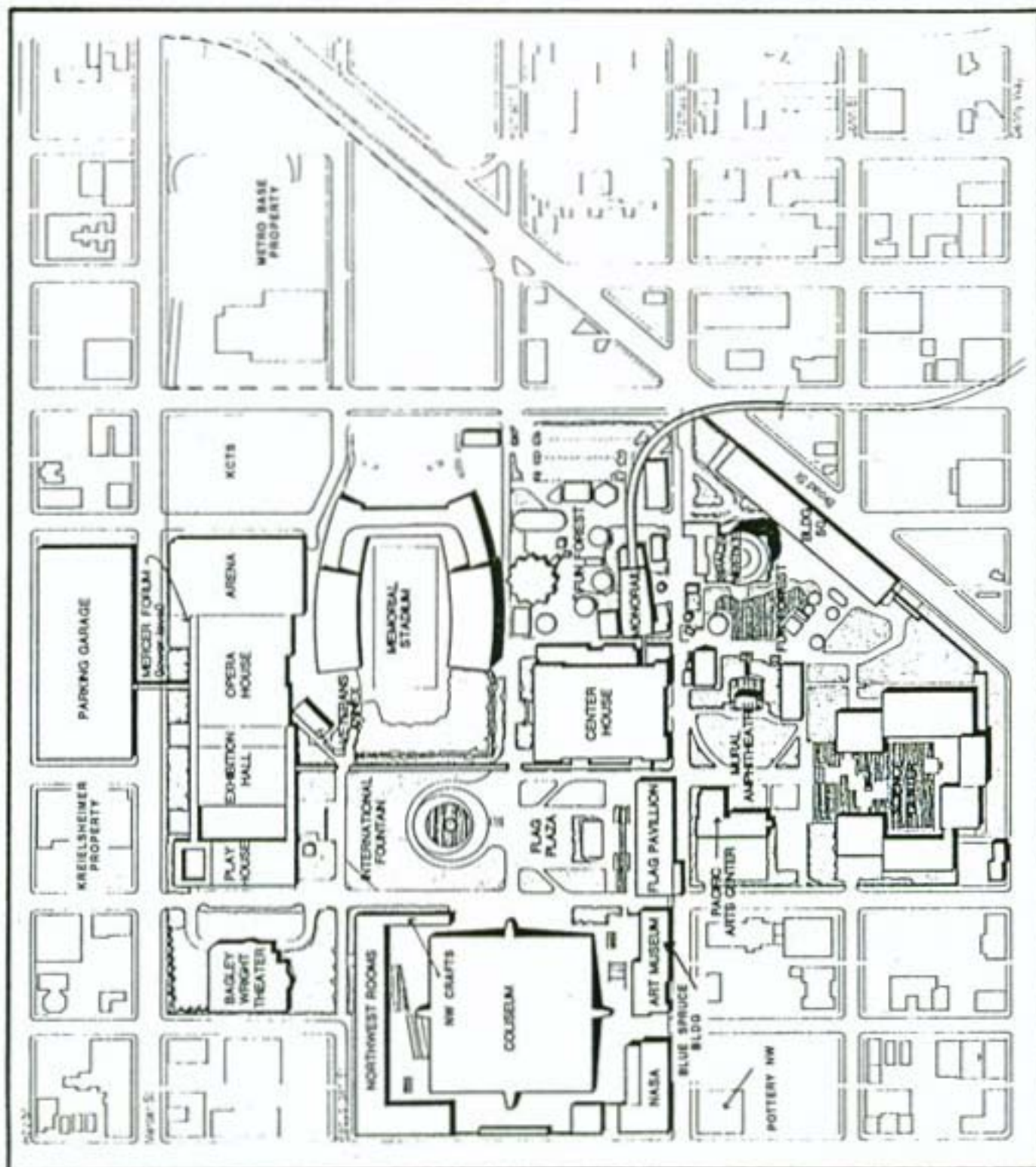


Figure 3
SEATTLE CENTER

Table 4

**CAPACITY OF PUBLIC ACCESS FACILITIES
AT SEATTLE CENTER
1988**

| <u>Facility</u> | <u>Gross Floor Area (square feet)</u> | <u>Usable Exhibit Area (square feet)</u> | <u>Aggregate Seating Capacity by Event Type</u> | | | |
|---|---|--|---|--------------------|-------------------|----------------|
| | | | <u>Reception</u> | <u>Theater</u> | <u>Conference</u> | <u>Banquet</u> |
| Coliseum | 252,026 | 125,000 | 15,000 | 1,500 | 965 | 3,000 |
| Opera House | 223,206 ¹ | -- | -- | 3,077 ² | -- | 1,275 |
| Arena | 108,014 | 15,600 | 6,000 | 6,118 | 540 | 1,500 |
| Northwest Rooms (9 rooms) | 70,310 | 35,100 | 4,217 | 4,217 | 1,724 | 1,910 |
| Bagley Wright Theater | 69,213 ³ | -- | -- | 864 | -- | -- |
| Exhibition Hall | 58,448 | 40,000 | 2,500 | 3,000 | 175 | 2,500 |
| Playhouse | 42,064 | -- | -- | 424 ⁴ | -- | -- |
| NASA Building ⁵ | 25,088 | -- | -- | -- | -- | -- |
| Flag Pavilion (2 rooms) | 21,742 | 17,300 | 1,500 | 2,000 | 1,088 | 1,200 |
| PAC Hall | 20,224 | 3,700 | 350 | 550 | 176 | 290 |
| Mercer Forum (8 rooms) | 19,950 | 4,400 | 1,086 | 1,086 | 534 | 650 |
| Center House Conference Center (8 rooms) | 18,895 | 7,400 | 530 | 530 | 342 | 420 |
| Center House Theater | 15,768 | -- | -- | 250 | -- | -- |
| Opera House Rehearsal Hall | see OH | 4,400 | -- | 250 | -- | -- |
| Poncho Forum | see BWT | -- | -- | 140 | -- | -- |
| Mural Amphitheater | NA | -- | -- | 2,000 | -- | -- |

¹ Includes Rehearsal Hall, Opera Room, and other miscellaneous assembly spaces.

² Mainstage only.

³ Includes Poncho Forum.

⁴ Formerly 894 seats; reduced to present level on conversion for Intiman Theater use.

⁵ Building primarily used for storage only.

NA means not applicable.

Source: Seattle Center Department, Seattle Center Financial Analysis Report, June 1984; Seattle Center Finance Division, Cost Accounting Reports for 1986; and Seattle-King County Convention & Visitors Bureau, Seattle-King County Facilities Guide.

The retail and entertainment floors of the Center House make up the third grouping. Merchandise sales and food service operations are spread over three levels in the Center House and represent the dominant component of this multi-function building; operators of shops and food outlets lease their individual premises from Seattle Center. Entertainment activities, nearly all of which are sponsored by Seattle Center as free public programs, are largely concentrated on the Food Court (middle) level of the Center House, which has a stage, dance floor, and a small amount of exhibit area.

The fourth category of facilities at Seattle Center embraces privately operated, exclusive-use components under lease from Seattle Center. Included are the Blue Spruce Building rented to individual office tenants, Building 50 (a storage warehouse currently rented to the Fun Forest concessionaire), the Pottery Northwest Building used as an artists' studio, the Northwest Crafts Annex (part of the Northwest Rooms complex but separately leased, also as an artists' studio and gallery), and office space on the fourth floor of the Center House (rented to various user organizations of Seattle Center, such as the Seattle Opera Association and Seattle Symphony). These facilities are generally not open to the public and have little or no integration with other components of Seattle Center.

Last among the facility groupings is transportation (Monorail) and parking. The Monorail, owned and operated by the City of Seattle, is one of only three such attractions in this country (the other two being located within the Disney theme parks), and has two terminals--one adjacent to the Fun Forest at Seattle Center and one at Westlake Plaza in the downtown business district. Parking facilities currently encompass seven lots on the periphery of Seattle Center totaling some 1,600 spaces, plus a 1,500-car garage. All except the Memorial Stadium lot are municipally owned and operated.

In addition to existing facilities as just described, there are two other city-controlled properties on the boundary of Seattle Center that have been proposed for new component attractions. The first of these is the abandoned Metro Base bus yard to the east of the present building complex, a sizable (12.5 acres) property now used for overflow parking and storage. The second is a smaller, 1.5-acre site to the north of Seattle Center adjacent to the parking garage, which was recently acquired by the city from the Kreielsheimer Foundation and is designated by deed restriction for cultural or educational use. Phase II of this study assignment will explore development alternatives for these properties.

As the foregoing summary of facility mix suggests, Seattle Center has a varied assortment of building components enabling an equally diverse menu of activities and programs. A more detailed description and use analysis for each of the Center's component facilities will be presented subsequently.

Programming Mandate

The Mission Statement for Seattle Center, adopted in City Council Resolution #2323, embodies the intended programming thrust of the complex:

"The Seattle Center is visualized as an active and lively civic center, with primary emphasis on the arts, education and entertainment for the inhabitants of Seattle and the entire Northwest. Its plazas and buildings, both great and small, will accommodate a wide range of uses and activities which include festivals, theatrical performances, concerts, exhibitions, amusements, sports events, and general gatherings..."

Seattle Center has admirably fulfilled these programming goals. As indicated in **Table 5**, more than 5,000 separate events were staged at the Center during 1986 (the latest year for which complete operating data are available). Approximately 1,900 of these events, or some 36 percent of the total, were generated in the performing arts category, while about 1,600 events, or 29 percent, were associated with festivals, dances, family shows, and other general entertainment. The convention/meeting/exhibit category accounted for roughly 1,500 events, for a 28 percent share, while the 364 sports events represented some 7 percent of the total. Overall, Seattle Center itself was the sponsor of 30 percent of all program activity, with its 1,600-plus events mostly concentrated in the general entertainment category. The balance of the Center's programming originated among a large number of "client" sponsors, including resident performance organizations as well as outside event promoters.

Financial Performance Summary

An overview of Seattle Center financial performance during 1986 is presented in **Table 6**. As indicated, earned revenue from operations (derived from rents, fees, reimbursements, and catering) amounted to some \$8.2 million. The latter was sufficient to cover approximately 70 percent of the \$11.9 million aggregate operating cost, with the residual \$3.7 million operating deficit offset by general fund (tax-supported) contributions. The largest operating loss, amounting to some \$2.3 million, or more than 60 percent of the overall deficit, was associated with maintenance of the grounds and public spaces in the Center House. These facilities have negligible revenue-generation capability given the free-admission policy of Seattle Center and will remain a primary item in the required operating budget.

Among programming categories, the performing arts had by far the lowest revenue/cost ratio, reporting income equivalent to only 45 percent of aggregate operating expenses. This is a consequence of the city's established commitment to the arts as reflected in a policy awarding liberally discounted rental rates to nonprofit performance organizations in the spirit of public service. Allowing that the economic reality of the arts makes it difficult to raise rental fees to a point commensurate with increases in maintenance and other facility overhead costs, the gap between revenue and costs progressively widens, meaning that the arts must be increasingly subsidized. Turning to the sports, convention, and exhibit category, the revenue ratio improves measurably, with earned income representing 75 percent of total costs. The absolute deficit of \$1.1 million, however, is nearly as high as that of the performing arts. Here, the problem is not only below-market rental fees, but that the age and deteriorating condition of many of the buildings used for these purposes has induced significant increases in maintenance and repair costs which, in a classic "Catch 22,"

Table 5

EVENT ACTIVITY BY PROGRAM TYPE
AT SEATTLE CENTER
1986

| <u>Program Type</u> | <u>Total Event-Days</u> | | | <u>Percent of Total</u> |
|---------------------------|------------------------------|------------------------------|--------------|-----------------------------|
| | <u>Center- Sponsored</u> | <u>Client- Sponsored</u> | <u>Total</u> | |
| Performing Arts | | | | |
| Seattle Repertory Theater | -- | 554 | 554 | 10.3% |
| Children's Programs | -- | 510 | 510 | 9.5 |
| Seattle Opera Association | -- | 326 | 326 | 6.1 |
| Seattle Symphony | -- | 131 | 131 | 2.4 |
| Pacific Northwest Ballet | -- | 89 | 89 | 1.6 |
| Rock Concerts | -- | 28 | 28 | 0.5 |
| Other Performing Arts | <u>120</u> | <u>157</u> | <u>277</u> | <u>5.2</u> |
| Subtotal | 120 | 1,795 | 1,915 | 35.6% |
| General Entertainment | | | | |
| Festivals/Celebrations | 524 | 101 | 625 | 11.6% |
| Dances/Parties | 386 | 55 | 441 | 8.2 |
| Other Special Events | 341 | -- | 341 | 6.4 |
| Films | -- | 25 | 25 | 0.5 |
| Family Shows | -- | 12 | 12 | 0.2 |
| Miscellaneous Activities | <u>85</u> | <u>51</u> | <u>136</u> | <u>2.5</u> |
| Subtotal | 1,336 | 244 | 1,580 | 29.4% |

Table 5
(Continued)

| <u>Program Type</u> | <u>Total Event-Days</u> | | <u>Percent of Total</u> |
|----------------------------------|------------------------------|------------------------------|-----------------------------|
| | <u>Center- Sponsored</u> | <u>Client- Sponsored</u> | |
| Conventions/Meetings/Exhibitions | | | |
| Meetings/Seminars/Classes | 169 | 787 | 956 |
| Trade Shows/Exhibitions | -- | 311 | 311 |
| Consumer Shows | -- | 155 | 155 |
| Conventions | -- | 90 | 90 |
| Subtotal | 169 | 1,343 | 1,512 |
| Sports | | | |
| Hockey | -- | 130 | 130 |
| Sonics Basketball | -- | 119 | 119 |
| Other Sonics Activities | -- | 89 | 89 |
| Other Sports | -- | 26 | 26 |
| Subtotal | -- | 364 | 364 |
| Total | 1,625 | 3,748 | 5,371 |

Source: Seattle Center Finance Division, Cost Accounting Reports for 1986; and
Harrison Price Company.

Table 6

**SEATTLE CENTER
FINANCIAL PERFORMANCE SUMMARY
1986**

| <u>Facility</u> | <u>Total Revenue¹</u> | <u>Total Costs²</u> | <u>Net Income (Loss)</u> |
|------------------------------------|--------------------------------------|------------------------------------|----------------------------------|
| Performing Arts Facilities | | | |
| Opera House ³ | \$864,248 | \$1,237,676 | \$(373,428) |
| Bagley Wright Theater ⁴ | 182,884 | 440,130 | (257,246) |
| Playhouse | 111,095 | 227,231 | (116,136) |
| Center House Stage/Court | 14,064 | 610,425 | (596,361) |
| Center House Theater | <u>13,669</u> | <u>88,297</u> | <u>(74,628)</u> |
| Subtotal | \$1,185,960 | \$2,603,759 | \$(1,417,799) |
| Sports/Meeting/Exhibit Facilities | | | |
| Coliseum | \$1,857,246 | \$2,042,818 | \$(185,572) |
| Arena | 597,125 | 880,520 | (283,395) |
| Exhibition Hall | 290,441 | 362,816 | (72,375) |
| Northwest Rooms | 186,163 | 422,789 | (236,626) |
| Flag Pavilion | 87,833 | 185,947 | (98,114) |
| Mercer Forum | 41,535 | 123,408 | (81,873) |
| Center House Conference Center | 25,551 | 128,179 | (102,628) |
| NASA Building | <u>16,002</u> | <u>48,098</u> | <u>(32,096)</u> |
| Subtotal | \$3,101,896 | \$4,194,575 | \$(1,092,679) |
| Exclusive Use Facilities | | | |
| Center House Retail/Food | \$706,808 | \$408,304 | \$298,504 |
| Fun Forest | 548,080 | 49,905 | 498,175 |
| KCTS Television Studios | 65,000 | 60,323 | 4,677 |
| Blue Spruce Building | 33,871 | 41,676 | (7,805) |
| PAC Hall | 20,968 | 64,166 | (43,198) |
| Northwest Crafts Annex | 8,637 | 8,253 | 384 |
| Pottery Northwest Building | 7,909 | 12,323 | (4,414) |
| Other Tenants | <u>96,680</u> | <u>249,248</u> | <u>(152,568)</u> |
| Subtotal | \$1,487,953 | \$894,198 | \$593,755 |

Table 6
(Continued)

| <u>Facility</u> | <u>Total Revenue</u> | <u>Total Costs</u> | <u>Net Income (Loss)</u> |
|---|--------------------------|------------------------|----------------------------------|
| Public Space and Grounds | | | |
| Landscape and Grounds ⁵ | \$146,822 | \$1,185,541 | \$(1,038,719) |
| Fountains | -- | 109,801 | (109,801) |
| Center House Public Space | <u>(3,364)</u> | <u>1,097,945</u> | <u>(1,101,309)</u> |
| Subtotal | \$143,458 | \$2,393,287 | \$(2,249,829) |
| Transportation and Parking | | | |
| Parking | \$1,640,450 | \$699,120 | \$941,330 |
| Monorail | <u>619,160</u> | <u>1,107,524</u> | <u>(488,364)</u> |
| Subtotal | <u>\$2,259,610</u> | <u>1,806,644</u> | <u>\$452,966</u> |
| Total | \$8,178,877 | \$11,892,463 | \$(3,713,586) |
| Cancellations and Reconciliation ⁶ | \$9,072 | \$7,069 | \$2,003 |
| Capital Improvement Program | 316,219 | 578,532 | (262,313) |
| Other Fund Contributions | <u>3,862,829</u> | <u>---</u> | <u>3,862,829</u> |
| Grand Total | \$12,366,997 | \$12,478,064 | \$(111,067) |

¹ Includes rental or lease fees, reimbursements for services, catering and concessions, and miscellaneous fees and charges.

² Includes direct expenses, facility services costs, and indirect overhead and administrative costs.

³ Includes Rehearsal Hall.

⁴ Includes Poncho Forum.

⁵ Includes Mural Amphitheater.

⁶ Adjustments associated with public access facilities (performing arts and sports/meeting groups).

Source: Seattle Center Finance Division, Cost Accounting Reports for 1986; and Harrison Price Company.

cannot be passed on to users in the form of higher rates that are not justified by venue quality.

Positive revenue/cost balances are found only among exclusive-use tenants and parking facilities. In the exclusive-use group, the leading revenue-generators are the Fun Forest and Center House retail operations, which together contributed almost \$800,000 in net income to Seattle Center. Parking facilities accounted for a substantial \$940,000 in net revenue and provided the single greatest net-income contribution.

A review of Seattle Center's overall financial performance during the past several years reveals that the aggregate revenue/cost ratio has been declining. In 1982, for example, combined earned revenue from all operations was equivalent to 86 percent of total costs. This ratio decreased to 80 percent in 1983, 77 percent in 1984, 73 percent in 1985, and now stands, as previously mentioned, at 70 percent. Revenues have consistently increased over the period, from \$7.4 million in 1982 to the present \$8.2 million, but have been outstripped by gains in operating costs brought on by the growing maintenance burden, higher utility rates, and heightened service levels required to meet intensified competition in the marketplace. Allowing that there are limits to the tax subsidy the Center can reasonably expect in the future, a major consideration in ensuing phases of this study assignment will be the determination of appropriate means of halting this downward trend.

BROAD USE PATTERNS OF SEATTLE CENTER

With the foregoing discussion of physical and operating characteristics as a framework, the paragraphs to follow describe broad patterns of attendance and facility usage at Seattle Center.

Attendance Volume

An estimate of aggregate visitation to Seattle Center is presented in **Table 7**, based on actual results for individual facilities where available together with extrapolations by Center management or Harrison Price Company where official records are absent (not all user organizations reliably supply attendance figures, while exact attendance at festivals and other free events is difficult or impossible to ascertain). As shown, the Center draws approximately 7.2 million visits annually at the present time, with the Center House retail/food service operations, the Space Needle, and the Pacific Science Center being the major attendance generators, each contributing around a million or more to the total. Attendance is also substantial at the Coliseum, at about 750,000 annually, along with the grounds at large (the estimate for which includes an allowance for major festivals), the Opera House, and the Fun Forest.

Given that an indeterminate number of visits--those associated with casual exploration of the site and with minor festivals and other miscellaneous activities--is unaccounted for, it is not unreasonable to conclude that Seattle Center is drawing close to 8 million visits per year overall. This is a remarkable accomplishment--placing Seattle Center in a class with preeminent American recreation attractions located in markets of vastly

Table 7

**ESTIMATED TOTAL ATTENDANCE
AT SEATTLE CENTER
1986**

| <u>Facility</u> | <u>Total Estimated Attendance</u> |
|---|---|
| Public Access Facilities | |
| Coliseum | 748,280 |
| Grounds ¹ | 520,422 |
| Opera House ² | 480,808 |
| Arena | 323,471 |
| Bagley Wright Theater | 172,550 |
| Northwest Rooms | 149,189 |
| Exhibition Hall | 133,705 |
| Flag Pavilion | 95,917 |
| Mercer Forum | 87,854 |
| NASA Building | 51,575 |
| Center House Conference Center | 41,061 |
| Playhouse | 31,350 |
| Center House Theater | 16,260 |
| Poncho Forum | 15,107 |
| PAC Hall | <u>50</u> |
| Subtotal | 2,867,599 |
| Privately Sponsored Facilities | |
| Space Needle | 1,159,000 |
| Pacific Science Center | 910,656 |
| Fun Forest | 400,000E |
| Seattle Children's Museum | 107,953 |
| Veteran's Hall | <u>na</u> |
| Subtotal | 2,577,609 |
| Center House Retail/Food/Entertainment | |
| Retail and Food Service Operations | 1,400,000E |
| Center House Stage/Court | <u>319,243</u> |
| Subtotal | <u>1,719,243</u> |
| Total | 7,164,451 |

¹ Includes Mural Amphitheater and major festivals.

² Includes Rehearsal Hall and other assembly spaces.

na means not available.

E means estimated.

Source: Seattle Center Finance Division, Cost Accounting Reports for 1986; Space Needle Corporation; Pacific Science Center; and Harrison Price Company.

greater size--and is indicative of the tremendous support the Center receives from residents and tourists alike.

Table 8 delineates the seasonal spread of patronage for selected Seattle Center attractions. Not surprisingly, volume tends to be greater during the summer months, when recreational outings by local residents and tourist visitation to the city is greatest. This seasonality, however, is not quite as pronounced as that of many recreational facilities open year-round (a peak month of 18 or 20 percent is not uncommon among major year-round theme parks, for example), suggesting that Seattle Center has considerable appeal as a destination throughout the year. The monthly distribution for the Pacific Science Center and Seattle Children's Museum is irregular and reflects patronage by school groups during the winter and spring yet, even here, a moderate summer "bulge" is also apparent.

It is more problematical to summarize event (as opposed to attraction) attendance at Seattle Center because attendance records for many individual activities are inaccurate or incomplete. The distribution of the event bookings themselves, however, is known and has been set forth in **Table 9**. As shown, the parade of "happenings"--including performances, meetings, shows, exhibits, rehearsals, and other diverse gatherings--is continuous and has no particular seasonal bias. If anything, it can be said that mild peaks occur in spring and fall, the so-called "shoulder" seasons, thereby complementing the previously described pattern for major component attractions.

In short, Seattle Center's usage is intense and continuous, a fact which has very favorable implications on the sizing of key infrastructure requirements such as parking and visitor circulation space--these facilities need not be sized to handle extremely large numbers of vehicles or people at one or two isolated peaks while standing almost empty during slack periods. Rather, a medium to high level of use can be anticipated at any given time of year.

Event Activity

A wide variance in intensity of use can be found among the component facilities of Seattle Center. As indicated in **Table 10**, the event load factor (that is, the number of recorded event-days divided by 365 calendar days) extends from a nominal 3 to 5 percent at the PAC Hall and NASA Building to a high of nearly 300 percent for the heavily programmed Center House stage and court area. Excellent load factors in excess of 100 percent--equivalent to at least one event every day on average--are also characteristic of the Center House Conference Center, Northwest Rooms, Center House Theater, and Opera House. In addition, the Coliseum, Poncho Forum, and Bagley Wright Theater have respectable event loading ratios varying from 73 to 78 percent, whereas remaining facilities fall below the 70 percent mark generally acknowledged as the dividing line between "successful" and under-utilized public assembly facilities. For Seattle Center overall, the load factor is an outstanding 87 percent; however, it is worthwhile to note that if the three Center House facilities (stage and court, conference center, and theater) are removed from the calculation, the overall ratio plummets to 61 percent. This one building, consequently--or at least the functions which take place in it--is clearly integral to the programming success of Seattle Center.

Table 8
MONTHLY DISTRIBUTION OF ATTENDANCE
FOR SELECTED SEATTLE CENTER ATTRACTIONS
1986

| <u>Month</u> | <u>Center House Retail/Food Operations</u> | <u>Seattle Monorail</u> | <u>Pacific Science Center</u> | <u>Seattle Children's Museum</u> |
|--------------|--|-----------------------------|---------------------------------------|--|
| January | 4.7% | 4.4% | 13.9% | 9.7% |
| February | 6.1 | 4.6 | 8.8 | 9.8 |
| March | 8.0 | 7.6 | 9.3 | 8.1 |
| April | 6.8 | 7.5 | 9.5 | 9.3 |
| May | 9.1 | 10.6 | 6.6 | 6.5 |
| June | 8.3 | 11.1 | 4.8 | 6.1 |
| July | 13.3 | 15.2 | 11.3 | 8.7 |
| August | 15.1 | 18.6 | 10.6 | 7.8 |
| September | 7.4 | 4.2 | 4.6 | 4.5 ¹ |
| October | 6.6 | 5.2 | 5.5 | 8.5 |
| November | 6.3 | 4.1 | 6.4 | 10.5 |
| December | <u>8.3</u> | <u>6.9</u> | <u>8.7</u> | <u>10.5</u> |
| Total | 100.0% | 100.0% | 100.0% | 100.0% |

¹ Museum closed two weeks during September 1986.

Source: Seattle Center Contracts and Concessions Division, Seattle Center Transportation Services Division, Pacific Science Center, Seattle Children's Museum, and Harrison Price Company.

Table 9

**MONTHLY DISTRIBUTION OF EVENT ACTIVITY
FOR SEATTLE CENTER PUBLIC ACCESS FACILITIES
1986**

| <u>Month</u> | <u>Percent Distribution of Events¹</u> | | |
|--------------|---|---|--------------|
| | <u>Performing Arts Facilities</u> | <u>Sports/Meeting/ Exhibit Facilities</u> | <u>Total</u> |
| January | 5.6% | 7.2% | 6.4% |
| February | 7.3 | 9.8 | 8.4 |
| March | 9.3 | 10.6 | 9.9 |
| April | 10.2 | 8.6 | 9.5 |
| May | 9.0 | 9.4 | 9.2 |
| June | 6.2 | 5.7 | 6.0 |
| July | 9.7 | 6.8 | 8.3 |
| August | 8.8 | 6.0 | 7.5 |
| September | 6.8 | 7.3 | 7.0 |
| October | 9.9 | 9.6 | 9.8 |
| November | 8.8 | 10.3 | 9.5 |
| December | <u>8.4</u> | <u>8.7</u> | <u>8.5</u> |
| Total | 100.0% | 100.0% | 100.0% |

¹ Based on 5,371 total on-site event-days in 1986.

Source: Seattle Center 1986 Duty Manager's Log and Harrison Price Company.

Table 10

**EVENT LOAD CHARACTERISTICS OF
SEATTLE CENTER PUBLIC ACCESS FACILITIES
1986**

| <u>Facility</u> | <u>Total Number of Event-Days¹</u> | <u>Event Load Factor²</u> |
|---|---|--|
| Center House Stage/Court | 1,067 | 292% |
| Center House Conference Center | 677 | 185 |
| Northwest Rooms | 643 | 176 |
| Center House Theater | 526 | 144 |
| Opera House | 370 | 101 |
| Coliseum | 284 | 78 |
| Poncho Forum | 284 | 78 |
| Bagley Wright Theater | 267 | 73 |
| Arena | 227 | 62 |
| Opera House Rehearsal Hall/Other Spaces | 210 | 58 |
| Flag Pavilion | 193 | 53 |
| Exhibition Hall | 169 | 46 |
| Mercer Forum | 153 | 42 |
| Playhouse | 134 | 37 |
| Grounds ³ | 125 | 34 |
| NASA Building | 18 | 5 |
| PAC Hall | <u>10</u> | <u>3</u> |
| Total | 5,371³ | 87% |

¹ Includes events, performances, rehearsals, move-in and move-out days, and all other uses.

² Total event-days divided by 365 calendar days.

³ Excludes off-site events (14 event-days in 1986).

Source: Seattle Center Finance Division, Cost Accounting Reports for 1986; and Harrison Price Company.

Table 11 shows the distribution of aggregate event activity at Seattle Center by day of week. Fridays and Saturdays are the busiest days, as shown, and together represent 36 percent of a typical week's event volume. A secondary accent can be found on Wednesdays, accounting for around 14 percent of the week's events, while Mondays and Tuesdays tend to be the slow days of the week ("slow" being a relative term in the context of use intensity at Seattle Center). Separating the days of the week into weekend (including Friday evenings) and midweek categories, **Table 12** reveals that the split favors weekends. The two weekend days plus Friday night account for 56 percent of all event activity versus 44 percent for the five weekdays.

A further stratification of event activity, in this instance by time of day, is contained in **Table 13**. Daytime hours have a distinct edge, as indicated, with nearly half of all events taking place before 6 pm. Evenings are the time of preference for 27 percent of total events, while a substantial 25 percent share is attributed to continuous programs (that is, activities beginning well before 6 pm and extending on into the evening hours). To the degree possible and appropriate vis-a-vis event type, it may be that the encouragement of greater nighttime use represents an area of potential program expansion for Seattle Center.

A popular joke of years past has a young lad stopping an elderly gentleman on the street to inquire: "How do I get to Carnegie Hall?," to which the man replies: "Practice, my boy! Practice!" In this vein, it is not surprising to find in **Table 14** that fully one-quarter of Seattle Center's event calendar consists of practices of one kind or another--rehearsals, technical run-throughs, scenery and set assembly, auditions, and so on--plus the move-in and move-out days associated with trade shows, exhibitions, major festivals, and some convention events. Activities of this type are low revenue-producers, but are for the most part a "necessary evil"--certainly in the case of the performing arts, where the metaphoric search for Carnegie Hall is eternal--and marginally less so in the case of other user groups. With respect to the latter, some control can be exercised through booking policies limiting the number of days allowed for move-ins and the like but, on the whole, an appreciable change in this scenario is improbable.

EVALUATION OF COMPONENT FACILITIES

In the paragraphs to follow, the physical, programming, and financial characteristics of each of Seattle Center's component facilities is evaluated. Potential future use--which in many cases is simply preservation of the status quo--then is explored based on the goals of the Mission Statement and Policy Guidelines adopted by the City Council, earlier planning studies for Seattle Center, and rounds of interviews conducted by the present study team with various tenant groups, public officials, and representatives of the public at large.

Table 11
**EVENT ACTIVITY BY DAY OF WEEK
 FOR SEATTLE CENTER PUBLIC ACCESS FACILITIES
 1986**

| <u>Day of Week</u> | <u>Percent Distribution of Events¹</u> |
|--------------------|---|
| Monday | 11.2% |
| Tuesday | 11.5 |
| Wednesday | 14.4 |
| Thursday | 13.3 |
| Friday | 15.4 |
| Saturday | 20.7 |
| Sunday | <u>13.5</u> |
| Total | 100.0% |

¹ Based on 5,371 total on-site event-days in 1986.

Source: Seattle Center 1986 Duty Manager's Log and Harrison Price Company.

Table 12

WEEKDAY VERSUS WEEKEND EVENT ACTIVITY
FOR SEATTLE CENTER PUBLIC ACCESS FACILITIES
1986

| | Percent Distribution of Events ¹ |
|-------------------------------------|---|
| Weekday (Monday through 6PM Friday) | 56.4% |
| Weekend (6PM Friday through Sunday) | <u>43.6%</u> |
| Total | 100.0% |

¹ Based on 5,371 total on-site event-days in 1986.

Source: Seattle Center 1986 Duty Manager's Log and Harrison Price Company.

Table 13
**DAY VERSUS EVENING EVENT ACTIVITY
 FOR SEATTLE CENTER PUBLIC ACCESS FACILITIES
 1986**

| <u>Time Period</u> | <u>Percent Distribution of Events¹</u> |
|---------------------|---|
| Day (before 6PM) | 48.1% |
| Evening (after 6PM) | 27.2 |
| Continuous | <u>24.7</u> |
| Total | 100.0% |

¹ Based on 5,371 total on-site event-days in 1986.

Source: Seattle Center 1986 Duty Manager's Log and Harrison Price Company.

Table 14

EVENT VERSUS REHEARSAL/MOVING-DAY USAGE
FOR SEATTLE CENTER PUBLIC ACCESS FACILITIES
1986

| | Percent Distribution of Events ¹ |
|--|---|
| Performances/Meetings/Exhibits | 74.7% |
| Rehearsals/Move-Ins/other Nonpublic Uses | <u>25.3</u> |
| Total | 100.0% |

¹ Based on 5,371 total on-site event-days in 1986.

Source: Seattle Center 1986 Duty Manager's Log and Harrison Price Company.

Public Access Facilities

Much of the existing facility inventory at Seattle Center is clustered in the public access category, including the Coliseum, Opera House, Arena, Northwest Rooms, Bagley Wright Theater, Exhibition Hall, Playhouse, and a number of smaller operating units. These facilities are subsequently examined.

Coliseum

The Coliseum, largest single structure at the Center, has a total gross floor area of roughly 250,000 square feet. Located on the central western boundary of the site, it seats up to 15,000 people (including portable risers) for sports events, concerts, and convention assemblies and has 125,000 square feet of usable flat-floor exhibit area as well as an ice-making capability. In addition, the sides of the building may be partitioned into 12 to 16 smaller meeting rooms with an aggregate capacity of 675 persons (about 50 persons each); banquet capacity is some 3,000 people in the main hall. Though structurally sound, the Coliseum is somewhat outmoded--loading and other support facilities, for example, are inadequate by modern standards--and in need of cosmetic upgrading. Further, the worsening condition of the building's roof represents a growing maintenance burden.

Total revenue generated by this facility during 1986 amounted to roughly \$1.9 million, which easily covered the year's \$828,000 in direct operating costs (the costs of event production). However, after allocation of indirect overhead (administrative services, utilities, and so on), total operating costs rose to \$2 million, for a modest overall operating deficit of \$186,000. On the whole, then, the Coliseum has a revenue/cost ratio of 91 percent, the highest among public access facilities at Seattle Center. Revenue-wise, the most lucrative program categories were Seattle Supersonics basketball (contributing 31 percent of total revenue), rock concerts (30 percent of total revenue), and trade shows/exhibits (17 percent of total revenue).

A total of 284 events were held in the Coliseum during 1986, about half of which were associated with the currently resident Sonics basketball team (including regular home games, preliminary games, practice sessions, and booster club activities). Trade, consumer, and sales shows accounted for 27 percent of the event calendar, followed distantly by rock concerts at 7 percent of the total. The Sonics are presently considering a move from Seattle Center to the new arena proposed for Bellevue, which has raised the issue of whether the Coliseum can realistically expect to fill the dent in the calendar that would be created by the team's departure. In actuality, the Sonics defected once before (to the Kingdome), and have only returned to the Coliseum since the 1985-86 season. Programming of this facility in 1983, two years prior to the Sonics return, was mostly exhibit-oriented (trade, consumer, and sales shows), with events of this type representing 62 percent of 203 total event-days, suggesting that the fortunes of the Coliseum do not necessarily ride on the coattails of basketball. More to the point, the building's overall revenue/cost ratio in 1983 was approximately the same as it is now.

In today's more competitive market, however, recapturing exhibit/show activity displaced a few years back to make room for the Sonics will not be easy in light of the

building's shortcomings and, in any case, these flat-floor events represent an under-utilization of the facility resource (15,000 seats go begging). Alternatives as to the future disposition of the Coliseum as set forth by the city in its instructions for this study assignment include replacement with a modern, competitive arena with somewhat larger seating capacity (predicated on the retention of the Sonics), reuse of the site for some other purpose (such as, but not limited to, a technologically sophisticated conference and exhibit complex), or substantive improvement of the existing structure with the understanding that this facelift, however thorough, will probably not be sufficient to raise the Coliseum to the highest tier among competing venues. These alternatives, including their economic implications, will be closely examined in the next study phase.

Opera House

Another large and visible element of Seattle Center is the 3,077-seat Opera House at the north end of the site, containing a total gross floor area of about 223,000 square feet. In addition to the mainstage, the complex has a number of smaller assembly spaces, including the Rehearsal Hall (4,400 square feet, 250-person capacity), Symphony and Opera Rooms (each with about 1,700 square feet and a capacity of 120 persons), and several meeting rooms varying in capacity from 20 to 90 persons. Including the large foyer and stage areas, the Opera House can seat up to 1,275 persons for banquets in its various available spaces (these are normally used separately, rather than collectively, for smaller functions). The physical condition of this structure is excellent and expert opinion ranks the main auditorium's acoustics as outstanding.

The Opera House event calendar encompassed 370 event-days for the mainstage and 210 event-days for the Rehearsal Hall and miscellaneous spaces, for a combined load factor of 159 percent. Roughly half of this usage was contributed by the primary tenant, the Seattle Opera Association, with the Seattle Symphony accounting for 23 percent of combined event-days and the Pacific Northwest Ballet for 15 percent. Other, nonresident performing arts and film presentations provided most of the remaining programming. About 43 percent of all event generation in this facility is associated with rehearsals and other nonperformance use.

Some \$864,000 in revenue was recorded for Opera House activities during 1986 against \$369,000 in direct operating costs and \$1.2 million in total operating costs including Seattle Center overhead. The overall revenue/cost ratio thus came to 70 percent, leaving a residual deficit of \$373,000.

The only significant change envisioned for the Opera House in the future is the possible relocation of the Seattle Symphony to a new venue of its own. One of the development alternatives for the previously discussed Kreielsheimer property across Mercer Street from the Opera House is a new concert hall on the order of 2,500 seats, for which the Seattle Symphony would be the primary tenant, in tandem with a 400-seat Little Theater, the tenants of which could include the Seattle Children's Theater now based at the Woodland Park Zoo. The relocation of the Symphony would have two salutary effects: competition among resident organizations for calendar space at the Opera House would be eased appreciably, while the Symphony, presently forced

by circumstances to accept the dregs of available performance dates (most notably the "Twilight Zone" of Monday nights) would be given the opportunity to expand its audience and cultivate its artistic development to a degree not possible in the present shared-facility arrangement. A third benefit would be that some of the dates vacated by the Symphony could be used to augment the offering of touring professional attractions (guest orchestras, celebrity virtuosos, and other high-caliber "imports"), which are now a rare commodity on the jammed Opera House schedule.

Additionally, a concert hall--the distinction between this kind of auditorium and the proscenium-stage Opera House is important--coupled with a little theater would undoubtedly also attract use by chamber orchestras and ensembles, soloists, choral groups, and some dance companies (provided that stage flooring is engineered with dance use in mind). These extra-Symphony programs, which are in general better suited to more intimate venues than the Opera House, would flourish alongside the Symphony and supply an added dimension to the Seattle Center arts scene.

Arena

Third largest of Seattle Center's existing facilities, with a gross floor area of 108,000 square feet, is the Arena abutting the east side of the Opera House. This venue has a maximum seating capacity of approximately 6,100 people and may be curtained in half for smaller events requiring up to 3,000 seats. Usable exhibit area is slightly in excess of 15,000 square feet. Banquet capacity is about 1,500 persons, while a series of partitionable meeting spaces accommodates groups averaging 40 persons in size. The Arena floor is under ice throughout the hockey season, hockey being one of the principal program categories for this facility. Building condition is precarious--as one of the oldest structures at the site, it not only falls short of modern technological standards, but is also seriously deteriorated in both the fundamental and cosmetic sense.

Arena usage totaled 227 event-days in 1986, with hockey the predominant use at almost 60 percent of the total. Meetings, miscellaneous performing arts events, and other sports such as wrestling, basketball (non-Sonics), and tennis comprise the balance of the event calendar. About one-third of all events are accounted for by practice sessions, move-ins, and other low-revenue activities.

The Arena generated approximately \$597,000 in total revenue to Seattle Center in 1986. Of this total, hockey contributed 33 percent, rock concerts 20 percent, other performances 17 percent, and sundry sports 13 percent. Direct operating costs amounted to \$343,000, while total costs were \$880,000, yielding an overall revenue/cost ratio of 68 percent and a residual operating loss of \$283,000.

Future disposition of the Arena hinges in part on what happens at the Coliseum site; replacement of the existing Coliseum with a new large-capacity sports/exhibition venue would theoretically enable transfer of many of the Arena's existing activities, assuming that the new venue makes design provision for flexible seating capacities. Per-game hockey attendance at Seattle Center, for example, averages 2,600 people compared to the Sonics' present 6,500-person average, with public response to both sports swelling or ebbing with the league standings of the teams--the proverbial

expression "everyone loves a winner" is validated repeatedly in gate receipts for sports events (the one striking exception being professional football, which seems to have an inexhaustible reserve of diehard fans who will attend regardless of the home team's figurative distance from the Super Bowl).

A further consideration affecting the Arena is that regulation-size ice rinks maintained on a permanent or seasonal basis are scarce in Seattle, and redevelopment of the Coliseum site is irrelevant in this context (the existing Coliseum, for example, employs its ice capability only five days per year for touring professional ice shows, and it is unlikely that any substitute facility would record much more ice-oriented use given the programming flexibility required to support a multi-use facility). One future use option for the Arena site, therefore, is to raze the existing building and develop a first-class ice facility in its stead. The cost of creating and, especially, maintaining a permanent ice-rink is considerable and would only be warranted at high demand levels (implying a resident professional hockey team together with resident skating instruction and Little League hockey programs, well-attended public skating sessions, and the rental of so-called "private ice" to competitive skaters). Another factor is that the Arena site is not ideal for this use--it is inconsistent with the performing arts emphasis of the Mercer Street corridor and is in addition remote from the center of action at Seattle Center (which negates its value as spectator entertainment for casual passers-by and also tends to undermine its ability to garner impulse business for public skating sessions).

Another alternative for the Arena site that is more in keeping with the Mercer environment is development of a sorely needed technical support annex to the Opera House (scene shop, costume and prop storage, and the like). Only a portion of the site would be absorbed for this purpose; remaining area available could be used to satisfy another need identified in the course of this study, namely a new performance venue for the Seattle Children's Theater. Phase II of this study effort will analyze the viability of these and other options.

Northwest Rooms

Nine adjoining meeting venues comprise the Northwest Rooms complex bracketing the north side of the Coliseum. In the aggregate, these rooms have a total floor area of 70,000 square feet and can seat up to 4,200 persons for assemblies, 1,700 for classroom-type events, and 1,900 for banquets. Largest of the individual units is the San Juan Suite, a series of four rooms (designated by the names Orcas, Lopez, Fildalgo, and Shaw) that can be used separately or in various combinations for meeting functions of 175 to 1,100 persons and banquet functions of 90 to 600 persons. Next in size are the Rainier and Snoqualmie Rooms (each with a capacity of 750 for meetings and 350 for banquets), followed by the Olympic Room (holding roughly 450 for meetings and 200 for banquets), the Nisqually Room (capacity of 265 for meetings and 150 for meal-service functions), and the Alki Room (capacity of 200 for meetings and 250 for banquets). The latter unit has a two-story configuration, while all other rooms are single-story. The Northwest Rooms are in satisfactory physical condition, but need some remodeling with respect to aesthetics and "creature comforts."

More than 640 event-days--equivalent to a load factor of 185 percent--were recorded at the Northwest Rooms in 1986, making this venue one of the most heavily utilized at

Seattle Center. Meetings and conventions were the dominant program category at 60 percent of total events, with trade, consumer, and sales shows next in significance at 17 percent of the total. Other uses include private social functions and small exhibit events.

Revenue from Northwest Rooms activity in 1986 amounted to \$186,000. Direct costs of operation were some \$99,000, while overall operating expenses came to \$423,000. A comparatively low revenue/cost ratio of 44 percent is thus indicated for this venue, primarily a reflection of discounted rental rates paid by certain user groups (nonprofit organizations, for example) and, on the expense side of the equation, the relatively high administrative service level required to market and coordinate use of the facility.

If the Coliseum site is redeveloped, it may be logical to incorporate the functions of the Northwest Rooms in the new facility and demolish the present complex. Alternatively, this venue could be retained in more or less its present configuration with appropriate refurbishments that would increase its competitive appeal (the addition of a catering kitchen should be considered, among other enhancements). Demand for good quality, inexpensive meeting space invariably exceeds supply in any city, and preservation of the Northwest Rooms in one form or another is considered a high priority for Seattle Center.

Bagley Wright Theater

Newest of Seattle Center's components is the Bagley Wright Theater, an 864-seat auditorium which opened in 1984 on the northwest corner of the site as the permanent home of Seattle Repertory Theater. In addition to the mainstage, the Bagley Wright complex includes a 140-seat "black box" performance and rehearsal venue known as Poncho Forum. Structural condition is excellent; a recently apparent problem with the building's exterior finishing is now being remedied.

Including Poncho Forum, programming of the Bagley Wright facility totaled some 550 event-days in 1986, yielding an overall load factor of 151 percent. Seattle Repertory Theater is for all intents and purposes the sole user, representing 95 percent of the total event calendar. Rehearsals, as opposed to performances, accounted for slightly half of overall use in that year.

The Bagley Wright complex generated \$183,000 in total revenue in 1986 against \$107,000 in direct expenses and \$440,000 in total expenses, leaving a residual operating deficit of \$257,000. The revenue/cost ratio accordingly amounted to 42 percent, considerably lower than the Opera House but nevertheless in keeping with the exclusively nonprofit arts use of the facility.

No change is envisioned for Bagley Wright Theater in the future except to augment its visual integration with the Opera House and other adjacent performance venues as well as other Seattle Center attractions (at present, the pedestrian circulation and landscape arrangement tends to isolate Bagley Wright from its sister facilities). Program-wise, Seattle Repertory Theater makes only nominal use of the building during the summer, and potential may exist to develop a summer theater program that

would take up the June-August slack in the calendar, sponsored either by the resident company or an independent organization.

Exhibition Hall

Approximately 58,000 square feet of gross floor area and 40,000 square feet of usable display space are contained in Seattle Center's Exhibition Hall, located between the Opera House and Playhouse. The main hall of the facility has a maximum seating capacity of 3,000 for assemblies and 2,500 for banquets, while three small adjoining rooms can handle between 25 and 75 persons each. Structural condition is good, but decorative embellishments are minimal.

The Exhibition Hall's calendar totaled 169 events in 1986, for a very low utilization rate of 46 percent. Consumer and trade shows contributed the bulk of programming at 55 percent of the total; various meetings and social gatherings provided the balance. Use levels of this facility have been dropping over the past several years, suggesting that its viability as a display venue is waning.

Roughly \$290,000 in total revenue was reported for the Exhibition Hall in 1986. Direct expenses amounted to \$92,000 and total expenses including Seattle Center overhead were \$363,000. Despite its light calendar, the Exhibition Hall's residual deficit of \$72,000 is among the lowest at the site and its 80 percent revenue/cost ratio among the highest. The chief explanation for this relatively good financial picture is that the predominant trade and consumer show usage is a full-rate enterprise, which contrasts with the discounted rate schedule typical for nonprofit or public service use.

In accordance with the recent usage trend, plans are now being formulated to convert part of the Exhibition Hall to a different type of venue, namely to a ballet school and rehearsal facility. A second floor is to be created by dividing the existing space horizontally in half. The upper floor would then be used for a ballet school and rehearsal studio, while the lower level would remain, at least for the time being, as a display venue (there is reportedly a shortage of medium-sized exhibit facilities in Seattle, and it may be that more aggressive marketing could produce a better utilization rate for this component). This new program falls in step with the arts-oriented nature of other attractions along Mercer Street and will substantially augment the dance element of the overall arts presence at Seattle Center.

Playhouse

Just recently reconfigured is the Playhouse adjoining the Exhibition Hall. Up until mid-1983, this building was the 894-seat home of Seattle Repertory Theater; when the theater group moved to new quarters in the Bagley Wright Theater, the Playhouse became, for all practical purposes, redundant, though it continued to operate as a supplemental performing arts hall until late 1986. At that time, a decision was made to reduce the auditorium's capacity to 424 seats in response to need expressed for a smaller venue by the Intiman Theater Company--an erstwhile "gypsy" organization that had been bouncing around several auditoriums in the Seattle area; Intiman is now a resident tenant of the Playhouse. Building area left over after reduction of seating

capacity was redeveloped as rehearsal and technical space, and the building's interior was extensively refurbished. The discussion of 1986 use and financial performance to follow, therefore, concerns the "old" Playhouse and is not indicative of its status under the new format.

A total of 134 events were staged in the Playhouse in 1986, of which 80 percent were performing arts programs and the balance meeting and convention assemblies. The implied load factor was an extremely low 37 percent. Total revenue was \$111,000 in that year, with direct expenses amounting to \$93,000 and total expenses to \$227,000. The revenue/cost ratio was thus 49 percent.

Usage levels of the Playhouse can be expected to increase in the future given the residency of Intiman Theater and a smaller seating capacity which, assuming calendar slots are available, should attract additional users for whom other performance sites at Seattle Center are much too large. The Seattle Children's Theater could become a tenant if the proposed little theater is not built on the Kreielsheimer property; a caveat is that the seasons of the two organizations overlap, and this pairing may not in fact be workable.

NASA Building

The 25,000-square-foot NASA Building just south of the Coliseum is primarily a storage facility, but does receive nominal use as support space for major exhibitions and trade shows. Such use amounted to 18 days in 1986, while revenue amounted to \$16,000 and overall expenses to \$48,000. The resulting revenue/cost ratio of 33 percent is one of the lowest at Seattle Center. Although the storage function is important, there is otherwise little incentive to retain this structure given its age and condition. To a great extent, the disposition of this facility hinges on the future of the Coliseum along with opportunities for relocating its valuable storage space.

Flag Pavilion

The exhibit structure known as the Flag Pavilion, situated between the Center House and the Coliseum, has 22,000 square feet of gross floor area and net usable display space of about 17,000 square feet. The latter may be divided on demand for smaller spaces into two units of 5,000 and 12,000 square feet. Seating capacity for assemblies is roughly 2,000 persons at maximum, and banquet capacity is around 1,200 people. Originally developed as a "temporary" venue for the 1962 World's Fair, the building was later structurally reinforced to more permanent status, but remains among the poorest-quality and ugliest components of Seattle Center.

Use of the Flag Pavilion--about half of which is associated with consumer and trade shows--totaled 193 days in 1986, for a mediocre load factor of 53 percent. Aggregate revenues in that year amounted to \$88,000, while direct operating costs came to \$75,000 and total operating costs to \$186,000. A 47 percent revenue/cost ratio is thus indicated.

The Flag Pavilion is seriously deteriorated; moreover, a recent engineering study placed the cost of upgrading to meet modern building and earthquake codes well in

excess of the cost of replacing it with a comparable new structure. Further allowing that it constitutes an obstruction in the line of sight between the International Fountain/Flag Plaza area and the Pacific Science Center and other facilities to the south, the redevelopment program for Seattle Center will assume demolition of this marginal structure.

Pacific Arts Center and PAC Hall

Immediately south of the Flag Pavilion is the Pacific Arts Center, also known as "The Nile Temple," a building which pre-dates the World's Fair but was only fairly recently (1980) acquired by Seattle Center. It contains a 550-seat auditorium, designated PAC Hall, plus a number of classrooms, offices, and meeting rooms accommodating up to 175 persons; banquet capacity is on the order of 300 people. The resident Pacific Arts Center organization uses the building for childrens' art instruction programs, with the PAC Hall infrequently available (10 days during 1986) to outside organizations for festival events and meetings (prior to construction of Bagley Wright Theater, it was also used as a rehearsal facility by Seattle Repertory Theater). Total outside rental revenue for the PAC Hall was \$21,000 in 1986, equivalent to a low 33 percent of \$64,000 in aggregate operating expenses.

Though the condition of the Pacific Arts Center building is very good, its eccentric architecture and small scale is out of character with the rest of Seattle Center. Alternatives as to the future disposition of this venue, therefore, will encompass replacement by a more suitable structure if possible in light of bond encumbrances attached to the building or retention of the existing building with modifications to its exterior appearance. In any event, the Arts Center's thriving instruction programs will be continued.

Mercer Forum

Mercer Forum is an eight-unit, 20,000-square-foot meeting venue located between the Exhibition Hall and Arena and below the Opera House. Seating capacities for each of the rooms, which may be used singly or in differing combinations, vary from 100 to 160 persons, while banquet capacity is 60 to 100 people. In the aggregate, Mercer Forum can handle about 1,100 persons for assemblies and 650 for banquets, and there is also some 4,400 square feet of available display space. Because of its subgrade location, the Forum complex has no windows and tends to be a rather claustrophobic environment for meeting activities, a problem compounded by the obtrusive noise of its air conditioning system.

The Mercer Forum event calendar for 1986 listed 153 events, representing a low 42 percent load factor. Meetings of various description comprised the bulk of usage, with trade shows a distant second in significance. The facility is additionally used on occasion by the Seattle Opera Association for rehearsals and auditions (a use severely constrained by the aforementioned noise interference). Revenue generation was slightly less than \$42,000 in 1986, while expenses totaled \$123,000 overall to yield a 34 percent revenue/cost ratio.

Given its unattractive ambience, Mercer Forum is not particularly popular as a meeting place; most often, it is the choice of last resort among user groups unable to secure a booking at more appealing Seattle Center venues. New or refurbished and expanded meeting facilities elsewhere on the Seattle Center site should be able to absorb the Forum's current programming, with this component then converted to alternative use, possibly to "tech space" supporting performing arts activities, art or dance studios, or offices.

Center House Conference Center

Chiefly because of extensive bookings by the City of Seattle, the 19,000-square-foot Conference Center located on the third floor of the Center House is one of the site's most heavily used meeting venues. Comprised of eight rooms, capacity totals 530 people in the aggregate for assemblies and 420 people for banquets. Individual rooms range in capacity from 24 to 120 persons for meetings and 20 to 90 persons for meal-service functions. Available display area amounts to about 7,500 square feet.

A total of 677 event-days were recorded for the Conference Center in 1986, equivalent to a 185 percent overall load factor, a benchmark exceeded only by the Center House stage and court area. Meetings comprise more than 60 percent of all usage, and public service activities (largely meetings and social gatherings) account for 45 percent of the event load. Mainly because of this heavy public service orientation (whereby facilities are provided free of charge or at minimal rental rates), the revenue/cost ratio for the Conference Center was an extremely low 20 percent during 1986 given revenues of \$26,000 and overall costs of \$128,000.

Despite the age of the Center House--like The Nile Temple, it substantially pre-dates the World's Fair--it is in fairly good condition, but there are infrastructural problems (utility and HVAC systems, for example) as well as a great amount of wasted space in extra-wide hallways, enormous stairwells and landings, and numerous lobbies and vestibules. Originally built as a National Guard Armory, moreover, the Center House is massive in scale and has a blocky, "institutional" appearance that is intimidating and uninspired. Its sense of communion with the outside environment and, hence, integration with other facility components of Seattle Center is weak. The program elements of the Center House, on the other hand, are the very lifeblood of Seattle Center as mentioned earlier and must be preserved in one way or another. The Phase II study process will thus consider replacement of the Center House with a new facility or facilities encompassing most or all of its present functions (some, such as the Conference Center element discussed here, can be relocated elsewhere on the site) or, alternatively, comprehensively remodeling the existing building to amend, insofar as possible, its more conspicuous defects.

Center House Theater

A second element of the Center House is a 250-seat theater located on the lower, or Fountain, level of the building. This venue is currently the home of two children's theater organizations--the World of Mother Goose and Piccoli Junior Theater. Up until 1987, the Seattle Children's Theater was also based here. Gross floor area

approximates 16,000 square feet, a space created not too long ago in area formerly occupied by shops that were part of the Center House's retail complex.

With three resident tenants in 1986, theater programming was comparatively heavy, amounting to 526 event-days, for a 144 percent load factor. Very little of this use is associated with programs other than children's theater. The latter activity is extensively subsidized as reflected in a revenue/cost ratio of 15 percent, second-lowest at Seattle Center (after the Center House stage and court), given 1986 revenues of \$14,000 and total expenses of \$88,000.

Audience response to the Theater's present tenants has grown to the point that these organizations, like Seattle Children's Theater, may soon need larger venues. Another planning consideration is that the existing Theater is barely adequate in the technical sense--prior use as retail area introduced constraints on such design parameters as height of the stagehouse, resulting in a generally inferior presentation space. The study team will therefore evaluate the possible relocation of children's theater activities to a larger and more suitable venue, whether in the existing Center House (or successor structure) or at an independent site.

Mural Amphitheater

The final component of the public access facility category is the Mural Amphitheater, the only formally designated outdoor venue at Seattle Center. As many as 2,000 people can be accommodated "on the green" situated just north of the Pacific Science Center and west of the Space Needle and Fun Forest. As might be anticipated given area weather conditions, Amphitheater use is confined almost exclusively to the summer months, with all but a handful of the 70-plus events in 1986 taking place in July and August. Musical performances are almost the sole usage type, and are ordinarily in the popular vein (band ensembles, jazz and rock concerts, and country and western shows). For accounting purposes, the Amphitheater is treated as part of the overall grounds budget at Seattle Center, and it is therefore not possible to analyze the specific performance of this venue.

Several user organizations interviewed by the study team expressed an interest in a larger outdoor presentation space in the range of 5,000 to 10,000 seats (or equivalent in lawn seating), with envisioned programming embracing rock and other popular music, a summer "pops" series by the Seattle Symphony, and expanded festival usage. Land area is insufficient at the Mural Amphitheater site for this seating range, however, so a larger performance space would have to be located elsewhere. One possibility in regard to the latter is the present Memorial Stadium property (to be discussed subsequently). Once this proposal has been evaluated in greater depth in Phase II, it may be that the existing Amphitheater will become redundant and the site consequently made available for different purpose, most probably landscaped open space, a sculpture garden, or similar low-intensity use. "Soft" improvements of this nature are greatly needed at Seattle Center and are moreover mandated by the Policy Guidelines governing this study. The same directive, it should be mentioned, also applies to other areas of the Seattle Center grounds--the International Fountain and Flag Plaza area, for instance, needs redefinition and "greening."

Privately Sponsored Facilities

Seven facilities at Seattle Center are privately owned and/or operated. These include the site's signature attraction, the Space Needle, plus the Pacific Science Center, Fun Forest, Veteran's Hall, KCTS Television Studios, Seattle Children's Museum, and High School Memorial Stadium. Salient characteristics of these Center elements are discussed in the following paragraphs.

Space Needle

This premier landmark of the Emerald City, located at the southeast corner of Seattle Center, was initially built as a futuristic theme symbol for the 1962 World's Fair. It is comprised of a 520-foot observation tower providing a panoramic, 360-degree view of downtown Seattle, surrounding suburbs, and the magnificent Puget Sound coastline. A full-service, revolving restaurant is situated at the 500-foot level just below the observation deck, one section of which--known as the Emerald Suite--offers gourmet dining in an elegant, continental setting. At the Skyline Level 100 feet above the ground, there is a three-room reception/banquet facility able to accommodate between 40 and 350 persons. Patrons have the option of visiting the observation deck and restaurant singly or in combination; if a meal is purchased, elevator transportation is provided free of charge. A visitor lobby and gift shop are located at ground level.

The Space Needle drew approximately 1.2 million visitors in 1986, making it the highest attendance generator at Seattle Center and the city's leading tourist attraction--some 60 to 80 percent of all visitors are tourists depending on the time of year. Plans have recently been prepared for the revitalization of this attraction, which call for expanded interpretive content on the observation deck, more visitor service facilities (expanded retail operations, restrooms, and lobby), and redesigned landscaping at the base. These plans will be integrated with those of Seattle Center proper as outlined in Phase II of this study assignment, and are intended to enhance the entertainment value and provide for more efficient servicing of the attraction.

Pacific Science Center

Close on the heels of the Space Needle in attendance volume is the Pacific Science Center occupying the southernmost quadrant of Seattle Center. Total 1986 attendance amounted to roughly 911,000 (because of the complicated ticketing arrangement employed at the Science Center, this figure includes some double-counting, but is nevertheless accurate as an order-of-magnitude total). Twenty-five to 35 percent of these visitors are tourists. Growth in attendance has been steady and rapid over the past 10 years as the Science Center's programs and facilities have been expanded and redeveloped.

The six-acre Science Center site, originally the U.S. Pavilion for the World's Fair, contains five interconnected buildings housing a wide variety of imaginative, interactive displays spanning the full range of science and technology in tandem with a planetarium, Laserium, and 382-seat IMAX theater. The various buildings surround a central plaza containing a series of reflecting pools and covered walkways. A \$14 million master plan for long-range development has recently been adopted by the

Pacific Science Center, which encompasses reconfiguration of 15,000 square feet of floor space within existing buildings, an 18,000-square-foot building addition, a new public entry on Denny Way, a new outdoor display known as "Waterworks" that will feature musical fountains and water bells, a remodeled food service facility, and various landscaping improvements. As in the case of the Space Needle, these plans will be coordinated to the extent appropriate with those of Seattle Center overall.

Fun Forest

Spread over seven acres to the east of the Center House and wrapping around the Space Needle is the Fun Forest amusement complex, the former midway of the 1962 World's Fair. This attraction includes a number of traditional carnival rides along with a sizable area for "pitch" games, an arcade, miniature golf course, and food/beverage stands. Popular with children and the teenage visitor contingent at Seattle Center, the Fun Forest is seasonally operated from late April through Labor Day and on a variable weekend- and holiday-only basis during the rest of the year. Total attendance during 1986 is estimated at about 400,000 people, with aggregate ride volume reported at some 2 million rides. This operation generated some \$548,000 in total gross revenue to Seattle Center in 1986 which, less operating costs totaling about \$50,000, resulted in net income to the Center of \$498,000--second only to parking in significance.

The Fun Forest is among the most problematical of Seattle Center's attractions. On the one hand, it is a lucrative source of income and really the only facility specifically targeted at the teenage market, thus filling an important programming slot. On the other, it is extremely dated in character (though the concessionaire maintains high ride safety standards) and has a crazy-quilt layout that is confusing, unsightly, and substandard in terms of visitor comfort and ease of circulation. Moreover, the noise and frenetic atmosphere associated with operations of this type tend to detract from the more passive, adult- and family-oriented facilities comprising other parts of Seattle Center.

There is little question that the concept of a lively, colorful amusement area providing a safe, active outlet for youthful energies should be retained, but a complete overhaul and, probably, relocation of the existing facility is desperately needed. One planning alternative to be explored in Phase II is the transfer of this component to the Metro Base property on the eastern periphery of Seattle Center, where it could be enlarged, modernized, and integrated with new recreation and entertainment facilities aimed at the teen market. The existing Fun Forest site could then be cleared for such alternative use as a new entrance complex for Seattle Center, as an extension of the Center House site should the latter be replaced, or some combination thereof taking into account the future plans of the adjacent Space Needle.

Veteran's Hall

Sandwiched between Memorial Stadium and the Opera House is the old Veteran's Hall, a multi-story structure housing offices and meeting spaces for the American Legion, Daughters of the American Revolution, and other patriotic groups. The lower floors of the building are rented by Seattle Center as storage space. On the veterans' floors, three rooms are available for meetings, receptions, and banquets ranging in

capacity from 50 to 300 people, which are reportedly heavily booked (use is limited by policy to the American Legion and other kindred organizations).

The Veteran's Hall facility is awkwardly located, and its height blocks the vista from the Mercer Street arts complex to the Center House and other components on the south. Since it is not open to the general public, furthermore, it has no program relationship to the Center as a whole. Accordingly, the most likely scenario is that this building should be acquired by Seattle Center and torn down to free the site for other use, including open space if this becomes appropriate in the overall Center plan.

KCTS Television Studios

Recently constructed on the so-called "mounds" site immediately east of the Arena is a new studio complex for Seattle's public television station, KCTS/Channel 9. The building is owned by KCTS, but the site is leased from Seattle Center; it is a modest net income-generator to Seattle Center, with lease revenues reported at some \$65,000 in 1986 against \$60,000 in total expenses.

The educational/public service nature of this operation makes it a desirable component of Seattle Center--management cites internal surveys revealing that 65 of all Seattle-Tacoma households watch this station at least once per week, and audience coverage in nearby Vancouver, B.C. (an important source of tourist visitation to Seattle) is a phenomenal 90 percent. KCTS has ambitious plans for more in-house production, in which the performance organizations of Seattle Center will figure prominently, and has expressed interest in cooperatively developing a cable television linkup across the Mercer corridor of performing arts facilities to enable live broadcasting. Provision for this exciting partnership between the resident arts and public television will be incorporated into the overall Seattle Center redevelopment plan.

Seattle Children's Museum

Currently housed on the lower level of the Center House is the Seattle Children's Museum, a delightfully innovative educational and entertainment facility for the very young. The Museum moved to Seattle Center in 1985 from Pioneer Square and, by the end of its first full year at the Center in 1986, had tripled its attendance volume to 110,000 visitors. Further substantial increases in attendance will necessitate a move to larger quarters, which will be necessitated in any case if the Center House is demolished. Museum management has recently been considering the Flag Pavilion; however, as mentioned earlier, retention of that building is doubtful. Because the Museum appears to have a symbiotic relationship to the Space Needle--both attractions are very popular with young children--a relocation site near the Space Needle (perhaps on the Fun Forest or Mural Amphitheater sites if these operations are replaced or moved) will be given priority in the Phase II redevelopment plan for Seattle Center.

In connection with the future of the Museum, an idea meriting study is integration of the Children's Museum with a larger children's activity complex also encompassing a youngsters' branch of the Seattle Public Library, a new children's theater, and possibly

a children's play center equipped with a variety of imaginative play apparatus. Potential siting of a complex of this type will be explored in Phase II.

High School Memorial Stadium

The massive High School Memorial Stadium occupies a strategic position on the east central periphery of Seattle Center. It is an eight-acre property comprised of a 12,000-seat grandstand, playing field, and adjoining parking lot owned by the Seattle School District and used for high school football and soccer and occasionally for graduation ceremonies. As the city has suburbanized over the past few decades, demand for a centrally located sports venue of this scale has been progressively declining and its useful life may be nearing an end. This situation, together with the impenetrable barrier this facility creates between the Mercer Street arts complex and areas in the southern half of Seattle Center, makes it a prime candidate for demolition. The site could then be reused, leading priorities including an underground parking garage (the playing field is already well below grade and would require only a moderate amount of excavation for this purpose) with beautifully landscaped open space above. Part of this open space, moreover, could take the form of a new outdoor performance venue to replace and expand the existing Amphitheater.

Center House Retail and Entertainment Operations

Two major components of the Center House not yet discussed are the retail and food service operations on the first three levels of the building and the stage and court area on the Food Court level. Subsequent paragraphs describe the characteristics of these operations.

Retail and Food Service Outlets

Approximately 45,000 square feet of leasable area comprises the retail and food service component of the Center House. As listed in **Table 15**, there are currently 51 tenants in all--24 food outlets and 27 shops. The food group embraces one full-service restaurant, with the balance of these units being small snack stands or "sidewalk" cafes offering a diverse selection of snacks and meals, including several ethnic specialties. Most food operations are confined to the Food Court level, but there is one on the lower, Fountain level, and a few on the upper, Balcony level overlooking the Food Court.

Although the retail component of the Center House is a major generator of net income to Seattle Center (contributing almost \$300,000 in 1986), the sales performance of this facility is undistinguished and on the downslide. **Table 16** shows that the overall volume of \$7.1 million in 1986 sales is virtually the same as recorded in 1982, implying an appreciable real-dollar decline after allowing for price inflation. The distribution of sales by building level, presented in **Table 17**, reveals that sales increases have occurred only among tenants on the Balcony level, with Fountain level and, especially, Food Court level sales dropping over the 1982-1986 period. The combined food and merchandise sales ratio for the Center House amounted to \$159 per square foot, as indicated in **Table 18**, which is appreciably below the standard for specialty-oriented retail centers (where overall average sales ratios of \$300 to \$600

Table 15
CENTER HOUSE TENANT LIST
1988

| <u>Tenant Name</u> | <u>Leasable Area (square feet)</u> | <u>Percent of Total</u> |
|------------------------------|--|-----------------------------|
| Restaurants | | |
| Yukon Jack's | 4,520 | 10.1% |
| Fast Food Outlets | | |
| Apples, Inc. | 324 | |
| Baker's Old Fashioned Sweets | 1,184 | |
| Cafe Europe | 1,264 | |
| Cafe Loc | 491 | |
| Fire Fish | 100 | |
| The Frankfurter | 737 | |
| The Garden Patch | 666 | |
| Hickory Chick 'n Ribs | 1,668 | |
| Hi's Fruit Cart | 100 | |
| Kabob Corner | 547 | |
| Mikado (Steamer's) Fish | 936 | |
| Mongolian Steak House | 1,331 | |
| Mon Hei Bakery | 400 | |
| Orange Julius | 758 | |
| Pie Pantry | 1,670 | |
| Pizza Haven | 915 | |
| Ponce's Delciena Snack | 324 | |
| Popcornacopia | 100 | |
| Quincy's Hamburgers | 1,837 | |
| Scoops Ice Cream | 936 | |
| Seattle Fudge | 289 | |
| Yonny Yonson's Yogurt | 748 | |
| Yoya's Mexican Cafe | <u>903</u> | |
| Subtotal | 18,228 | 40.5% |

Table 15
(Continued)

| <u>Tenant Name</u> | <u>Leasable Area (square feet)</u> | <u>Percent of Total</u> |
|------------------------------|--|-----------------------------|
| Shops | | |
| Artesania de Espana | 947 | |
| Aziza's | 552 | |
| Batik Boutique | 553 | |
| The Clog Factory | 946 | |
| Das Gift Haus | 1,906 | |
| Ears To You | 535 | |
| Faces | 263 | |
| Far East Creations | 840 | |
| Frontier Scrimshaw Gallery | 1,116 | |
| Gabriel's Fine Gifts | 816 | |
| Hong Kong & China Imports | 1,201 | |
| Hubbard's | 425 | |
| Jenny's Hallmark | 2,235 | |
| Khan's of Morocco | 930 | |
| Miguel's Glass Blowing | 300 | |
| Northwest Artists (C. Bolen) | 1,125 | |
| Northwest Sheepskins | 904 | |
| Okuda Jewelry | 858 | |
| Old Tyme Photo Parlor | 533 | |
| Seattle Landmark | 1,644 | |
| Singing Depot | 395 | |
| Something Special | 551 | |
| The Sports Stop, Inc. | 216 | |
| Treasures Jewelry | 400 | |
| T-Shirt Emporium | 1,039 | |
| Wood & Straw Shop | 701 | |
| Wrappit | <u>271</u> | |
| Subtotal | <u>22,202</u> | <u>49.4%</u> |
| Total | 44,950 | 100.0% |

Source: Seattle Center Contracts and Concessions Division and Harrison Price Company.

Table 16
**CENTER HOUSE RETAIL/FOOD SALES VOLUME
 1982-1986**

| <u>Year</u> | <u>Adjusted Gross Sales Volume (thousands)</u> | | |
|---|--|--------------------|--------------|
| | <u>Food</u> | <u>Merchandise</u> | <u>Total</u> |
| 1982 | \$5,064 | \$1,983 | \$7,047 |
| 1983 | 5,155 | 2,276 | 7,431 |
| 1984 | 5,627 | 2,331 | 7,958 |
| 1985 | 4,857 | 2,063 | 6,920 |
| 1986 | 5,101 | 2,043 | 7,144 |
| Average Annual Rate of Increase 1982-1986 | 0.2% | 0.7% | 0.3% |

Source: Seattle Center Contracts and Concessions Division and
 Harrison Price Company.

Table 17
**CENTER HOUSE RETAIL/FOOD SALES
 BY BUILDING LOCATION
 1982-1986**

| <u>Year</u> | <u>Adjusted Gross Sales Volume (thousands)</u> | | | <u>Total</u> |
|---|--|-----------------------------|--------------------------|--------------|
| | <u>Fountain Level</u> | <u>Food Court Level</u> | <u>Balcony Level</u> | |
| 1982 | \$1,201 | \$5,216 | \$630 | \$7,047 |
| 1983 | 1,257 | 5,211 | 963 | 7,431 |
| 1984 | 1,357 | 5,550 | 1,051 | 7,958 |
| 1985 | 1,263 | 4,571 | 1,086 | 6,920 |
| 1986 | 1,178 | 4,659 | 1,307 | 7,144 |
| Average Annual Rate of Change 1982-1986 | (0.5)% | (2.8)% | 20.0% | 0.3% |

Source: Seattle Center Contracts and Concessions Division and
 Harrison Price Company.

TABLE 18
SALES PERFORMANCE RATIOS
FOR THE CENTER HOUSE
1986

| <u>Building Location</u> | <u>Leasable Area (square feet)</u> | <u>Average Sales Per Square Foot</u> |
|--------------------------|--|--|
| Fountain Level | | |
| Food Service | 289 | \$ * |
| Merchandise | <u>10,716</u> | <u>100</u> |
| Subtotal | 11,005 | \$107 |
| Food Court Level | | |
| Food Service | 19,743 | \$236 |
| Merchandise | <u> </u> | <u> </u> |
| Subtotal | 19,743 | \$236 |
| Balcony Level | | |
| Food Service | 2,716 | \$124 |
| Merchandise | <u>11,486</u> | <u>84</u> |
| Subtotal | <u>14,202</u> | <u>\$92</u> |
| Overall | | |
| Food Service | 22,748 | \$224 |
| Merchandise | <u>22,202</u> | <u>92</u> |
| Total | 44,950 | \$159 |

* Data withheld to protect confidentiality of individual operations.

Source: Seattle Center Contracts and Concessions Division and
Harrison Price Company.

per square foot are common). A high rate of tenant turnover, a preponderance of well-motivated but inexperienced merchants, an insufficient number of full-service restaurant "anchors," weak tenant mix, and a lack of convenient parking are some of the impediments to improved retail performance. Also instrumental is heightened competition in downtown Seattle, which will further intensify on opening of the new Westlake Plaza project now under construction at the downtown terminus of the Monorail.

The Center House facility itself, however, also plays a role in the sales trend (but is not necessarily the pivotal factor)--the building's monolithic scale and minimal decorative amenities dilute its competitive appeal. More importantly, exposure to the flow of pedestrian traffic at Seattle Center is very low owing to the fortress-like nature of the structure. The intensive entertainment programming of the stage and court area of the Center House has undoubtedly helped to invite the public in to eat and browse through the shops, but is not alone enough to overcome all of the other problems. If the Center House is retained, complete redesign of the interior will be necessary to produce a viable, competitive specialty retail center. Exterior facades, additionally, would have to be opened up somehow to create a "window" to the rest of Seattle Center. In the long run, the sizable investment needed to make these material changes is probably better committed to a new structure or structures.

Stage and Court Entertainment Activities

The Center House stage and court entertainment area occupies the large central portion of the Food Court level. Nearly 1,100 separate activities--dances, festivals, clown shows, films, performances, exhibits, fashion shows, and many other diverse events--were presented in these areas during 1986. The resulting event load factor of 292 percent is by far the highest at Seattle Center, as pointed out earlier in this section. These activities are, of course, heavily subsidized since most are presented as a public service. Only \$14,000 in revenue was generated in 1986, while overall operating expenses amounted to \$610,000. The revenue/cost ratio of 2 percent is Seattle Center's lowest.

Center House entertainment programs add vitality and flavor to Seattle Center and are viewed as a critical ingredient in the broad mix of activities. This factor, paired with the public service mandate of the attraction as a whole, makes it essential to retain this function in its entirety, whether or not the present structure itself is retained.

Miscellaneous Facilities

In addition to the major components of Seattle Center as discussed up to now, there are a number of miscellaneous elements to be addressed in the master redevelopment plan. These are briefly highlighted in the paragraphs to follow.

Seattle Art Museum Building

South of the Coliseum and west of the Flag Pavilion is the now-vacant building until recently occupied by the Seattle Art Museum (which has moved to a new off-site venue). This facility is in essence a twin to the Pavilion, though it is slightly smaller,

and has the same problems of poor condition and unsightly appearance. Given the absence of any compelling incentive to save this facility, its removal will be given due consideration in the redevelopment plan.

Blue Spruce Building

The Blue Spruce Building is a three-story structure abutting the south side of the Art Museum. Once housing the administrative offices for the World's Fair and later Seattle Center management in the early years, it is now rented to independent office tenants. Badly deteriorated, it has no useful function at Seattle Center and should be redeveloped (probably in conjunction with the Coliseum, NASA, and Art Museum sites), or converted to open space or parking.

Building 50

Paralleling Broad Street at the southeast corner of Seattle Center is the long, narrow structure designated Building 50. Like the Flag Pavilion, it was originally destined for a temporary life but, unlike the Pavilion, has received no upgrading to "permanent" status. The Fun Forest concessionaire currently uses it to store ride and games equipment. Building 50 tops the list of candidates for the wrecking ball--it is a dilapidated eyesore that completely obscures one of the key vistas into the site from the surrounding neighborhood. This site, moreover, offers perhaps the best alternative for a new, landscaped main entrance to Seattle Center.

Pottery Northwest Building

The small building housing the Pottery Northwest artists' studio is situated immediately south of the NASA Building. Its present use is consistent with the overall programming of Seattle Center and building condition is acceptable. Other than minor cosmetic improvements, then, it should probably be retained as is.

Northwest Crafts Annex

The east wing of the Northwest Rooms complex is occupied by another artists' studio known as Northwest Crafts. The function of the Annex is appropriate and desirable for Seattle Center; the fate of the physical facility is tied to that of the Northwest Rooms evaluated earlier, and it is likely that the studio should be relocated elsewhere on the site.

Center House Office Space

An assemblage of office and support facilities for various performing arts organizations is found on the fourth level of the Center House. These functions are essential and must be provided for in any successor to the present facility, or transferred to a new venue (Mercer Forum, as mentioned previously, is one possibility). Similarly, the sizable office requirements of Seattle Center staff, now located throughout the Center House, must be incorporated into the redevelopment plan.

Transportation and Parking

The final category of facilities to be evaluated in this study is transportation and parking. These elements are subsequently highlighted.

Monorail

The Seattle Monorail was initially constructed for the World's Fair to demonstrate the viability and efficiency of the monorail concept as a rapid transit system. The system consists of two trains on an elevated two-track, 1.5-mile guideway. Both trains are comprised of a pair of double-section cars providing seats for 124 persons and standing room for up to 325 additional persons. During the fair, the system handled up to 9,000 persons per hour and recorded a total of more than 6 million rides over the six-month fair run. Post-fair ridership dropped to a base of about one million rides annually, but then steadily increased during the early 1970s when no fee was charged, reaching a peak of about 2.7 million rides in 1976. As shown in **Table 19**, a fare of 10 cents was instituted in 1977, inducing a 5 percent drop in ridership. In the following year, the fare was increased to 25 cents; however, possible losses in passenger volume due to this increase were more than offset by the staging of the singular "King Tut" exhibit at Seattle Center, and an increase of 14 percent to nearly 3 million riders was recorded in 1978.

The trend in ridership since 1978 has been consistently downward, with 1986 volume amounting to 1.25 million. This trend is partly the result of continuing fare increases, but is also due to the waning novelty of the ride experience (at least among local residents) and the absence of incentives to attend Seattle Center comparable to the "King Tut" event. In 1987 and this year, there is the additional factor of dislocation caused by the construction project at the Westlake end of the line. An indication of the strength of the interrelationship between the Monorail and the Center is provided by somewhat dated but probably still valid rider surveys revealing that the Center House is the main destination for 60 percent of all respondents, followed by the Space Needle at roughly half, the Fun Forest and grounds in general, each at about 30 percent, and the Pacific Science Center at slightly more than 20 percent. A large proportion of riders destined for the Center House are downtown employees arriving during the luncheon period, while riders destined for the other attractions include an appreciable contingent of tourists.

The monthly distribution of Monorail patronage, presented earlier in **Table 8**, shows that passenger volume peaks during the summer as would be expected given the leisure-time orientation of Seattle Center, the strong tourist draw of the Space Needle, and the fact that the Fun Forest is in full swing at this time of year. The distribution of Monorail ridership by day of week shows a clear preference for Fridays and Saturdays, which together account for 40 percent of a typical week's volume. The peak traffic hours are between noon and 2 pm, when as many as 1,000 riders per hour are recorded.

As to the long-range future of Monorail ridership levels, passenger volume is clearly related to the quality and scope of Seattle Center's offerings. Once the present redevelopment program has been implemented and new incentives to visit the site are

Table 19
MONORAIL RIDERSHIP TRENDS
1973-1986

| <u>Year</u> | <u>Prevailing One-Way Fare¹</u> | <u>Total Rides (thousands)</u> | <u>Percent Change From Prior Year</u> |
|-------------|--|--|---|
| 1973 | Free | 1,754 | -- |
| 1974 | Free | 1,996 | 13.8% |
| 1975 | Free | 2,450 | 22.8 |
| 1976 | Free | 2,657 | 8.5 |
| 1977 | 10¢ | 2,514 | (5.4) |
| 1978 | 25¢ | 2,870 | 14.2 |
| 1979 | 25¢ | 2,373 | (17.3) |
| 1980 | 25¢ | 2,147 | (9.5) |
| 1981 | 35¢/10¢ | 1,833 | (14.6) |
| 1982 | 35¢/10¢ | 1,784 | (2.7) |
| 1983 | 50¢/15¢ | 1,722 | (3.5) |
| 1984 | 50¢/15¢ | 1,665 | (3.3) |
| 1985 | 60¢/15¢ | 1,457 | (12.5) |
| 1986 | 60¢/15¢ | 1,255 | (13.9) |

¹ Where two figures are shown, first fare is full rate, second fare is senior citizen and handicapped rate.

Source: Seattle Center Transportation Services Division and Harrison Price Company.

thereby created, there is every reason to expect a resurgence in Monorail ridership. It is noteworthy that even at the current rider volume, the Monorail returns 81 percent of its direct operating costs through fare revenue, compared to only 25 percent for the city bus system. The master plan, it should be noted, will include provision for a new Monorail terminal at the site in conjunction with redevelopment of the Fun Forest area.

Parking

A summary of parking operations at Seattle Center is contained in **Table 20**. Annual revenue per space currently averages more than \$600, with the range extending from a low of about \$260 per space at the Metro Base overflow lot to more than \$2,200 per space at Lot 6. The wide variances in per-space revenue reflect lot location and thus convenience, with the smaller lots closest to various Seattle Center attractions logically being the most popular. As has been mentioned, parking is the single greatest source of net income for the Center, generating \$940,000 in 1986.

Parking revenue is distributed by month in **Table 21**. Only moderate seasonal variation can be noted, with March being the peak month, followed by November and October. January is the slowest month. This pattern conforms closely to the seasonal distribution of event activity at Seattle Center (refer to Table 9), as would be expected.

A major objective of the master plan program is the reorganization of the overall parking scheme at Seattle Center, placing emphasis on the consolidation or elimination of smaller lots, development of new parking areas as warranted by increased demand levels resulting from facility redevelopment, and conversion of selected existing lots to other use, including landscaped open space. A "park and ride" concept will also be explored, incorporating the opportunity for a new underground garage on the Memorial Stadium site teamed with Monorail access to the downtown business district.

Table 20
SEATTLE CENTER PARKING REVENUE
1987

| <u>Parking Location</u> | <u>Number of Spaces</u> | <u>Total Parking Revenue</u> | | | | <u>Annual Revenue Per Space</u> |
|-------------------------|-----------------------------|------------------------------|------------------|--------------------------|----------------|---|
| | | <u>Meter</u> | <u>Attendant</u> | <u>Other¹</u> | <u>Total</u> | |
| Lot 1 | 130 | \$20,409 | \$268,191 | \$2,089 | \$290,689 | \$2,236 |
| Lot 2 | 1,002 ² | 35,869 | 219,729 | 5,908 | 261,506 | 262 |
| Lot 3 | 245 | 28,162 | 84,924 | 69,405 | 182,491 | 745 |
| Lot 4 | 102 | 54,888 | 56,847 | 29,428 | 141,163 | 1,384 |
| Lot 5 | 29 | 27,742 | -- | 4,554 | 32,296 | 1,114 |
| Lot 6 | 51 | 86,989 | 3,853 | 5,719 | 96,561 | 1,893 |
| Lot 7 | 60 | 43,891 | -- | 967 | 44,858 | 748 |
| Mercer Street Garage | <u>1,505</u> | <u>12,968</u> | <u>734,317</u> | <u>130,979</u> | <u>878,264</u> | <u>584</u> |
| Total | 3,122 | \$310,918 | \$1,367,861 | \$249,049 | \$1,927,828 | \$617 |

¹ Includes monthly permits and reserve sales.

² Number of available spaces is approximate only.

Source: Seattle Center Finance Division and Harrison Price Company.

Table 21
MONTHLY DISTRIBUTION OF PARKING REVENUE
AT SEATTLE CENTER
1987

| <u>Month</u> | <u>Percent of Total Revenue</u> |
|--------------|---|
| January | 6.7% |
| February | 7.3 |
| March | 10.1 |
| April | 8.3 |
| May | 9.2 |
| June | 6.4 |
| July | 7.7 |
| August | 7.9 |
| September | 8.4 |
| October | 9.4 |
| November | 9.5 |
| December | <u>9.1</u> |
| Total | 100.0% |

Source: Seattle Center Finance Division and Harrison Price Company.