

Internal Community Survey Results



Survey Results Overview

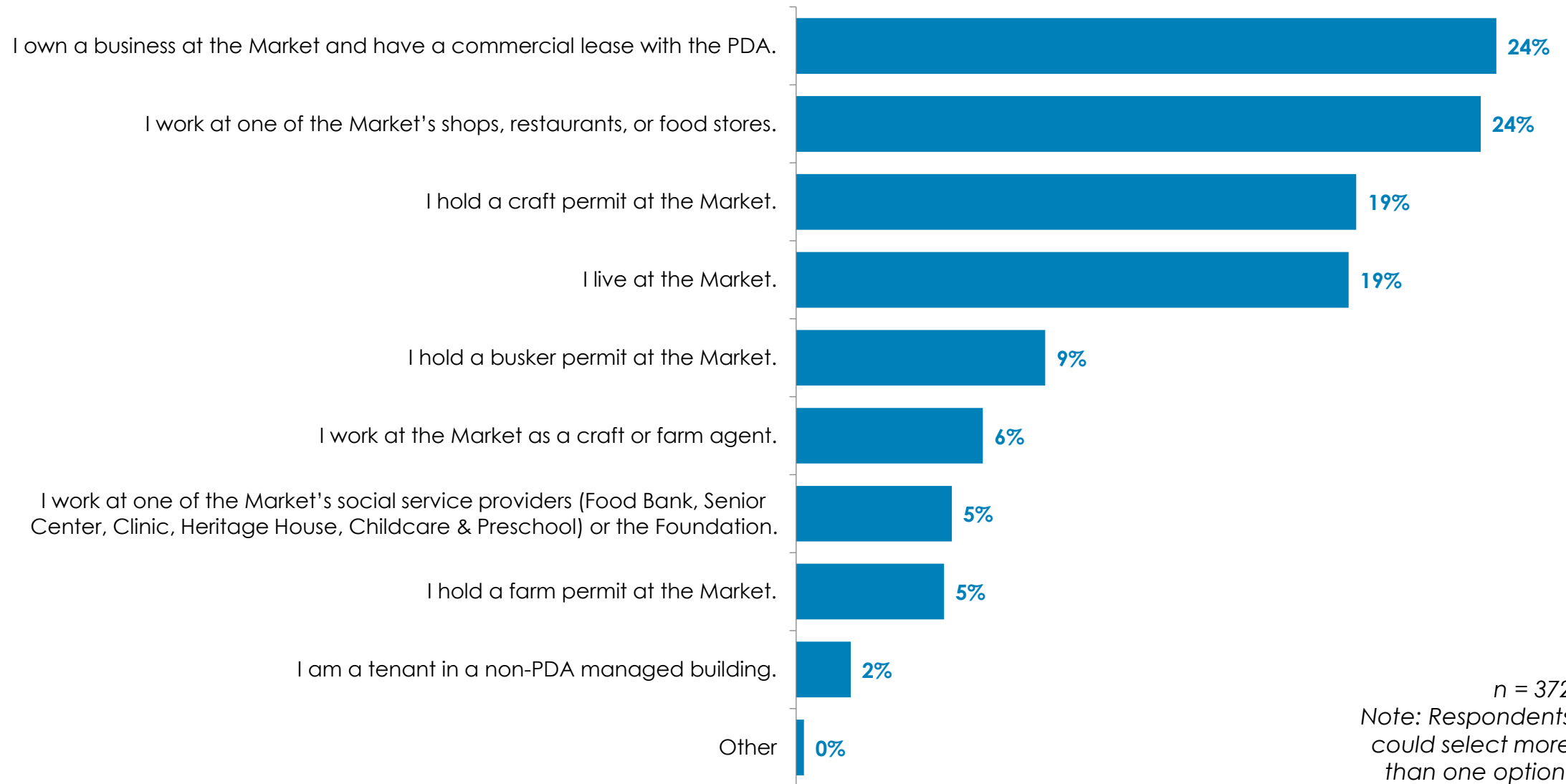
Internal Community Survey Overview

- **372 total survey respondents**
- Open from September 8 to September 26
- Promoted by the PDA to the Market community (see affiliations on the next slide).
- In addition to being promoted by email and on the website, paper copies were also to gather responses from individuals who may not have consistent access to a computer or the internet.

Objectives

- Gather input from the Market community to inform the Master Plan. Several open-ended questions allowed in-depth answers.
- Understand how responses differ based on Market affiliation.
- Identify how the street Pike Pl. is currently used by the Market community.

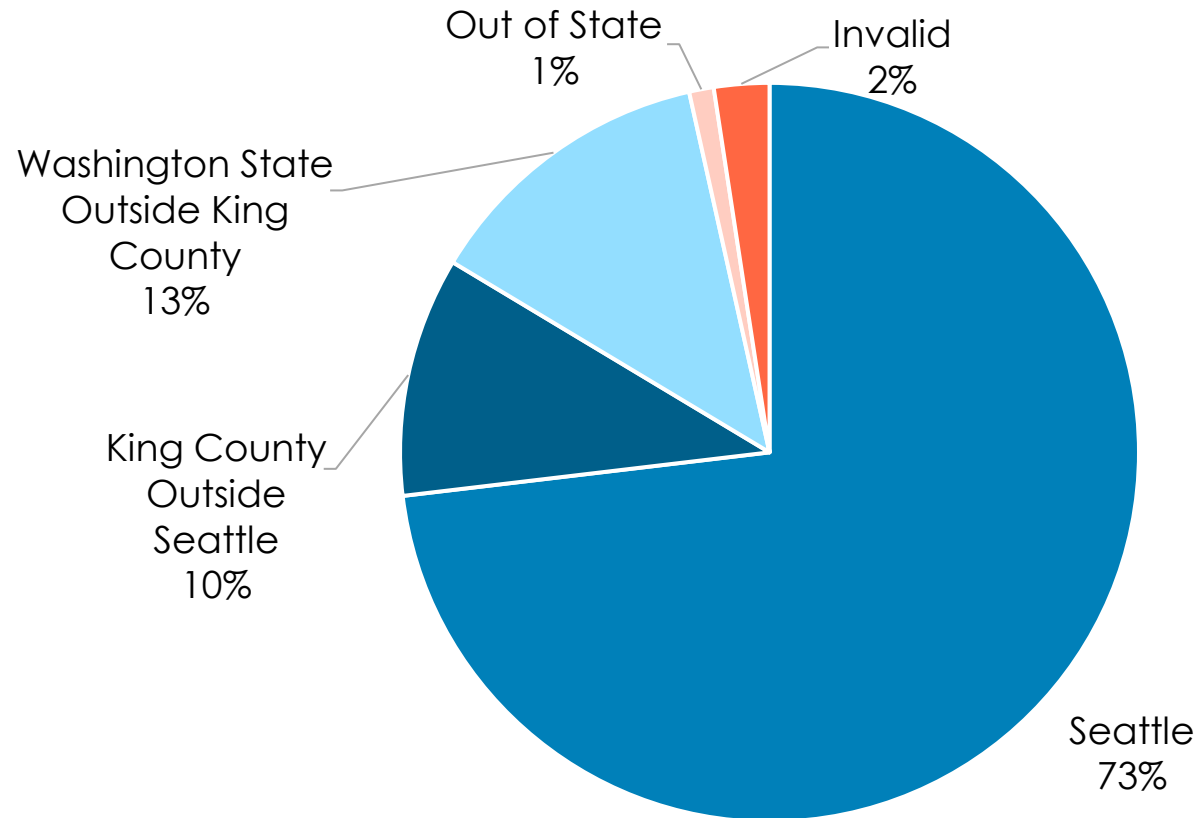
Respondents are from diverse affiliations



n = 372
Note: Respondents could select more than one option.

83% of all respondents live in King County

What is your home zip code?



n = 372
Note: Invalid includes missing responses.

Agreement with Statements

Survey respondents were asked: **How much they agree or disagree with various statements related to the Market today?**

Analysis Overview

We analyzed respondents' agreement with statements both in aggregate and categorized them based on the following market affiliations:

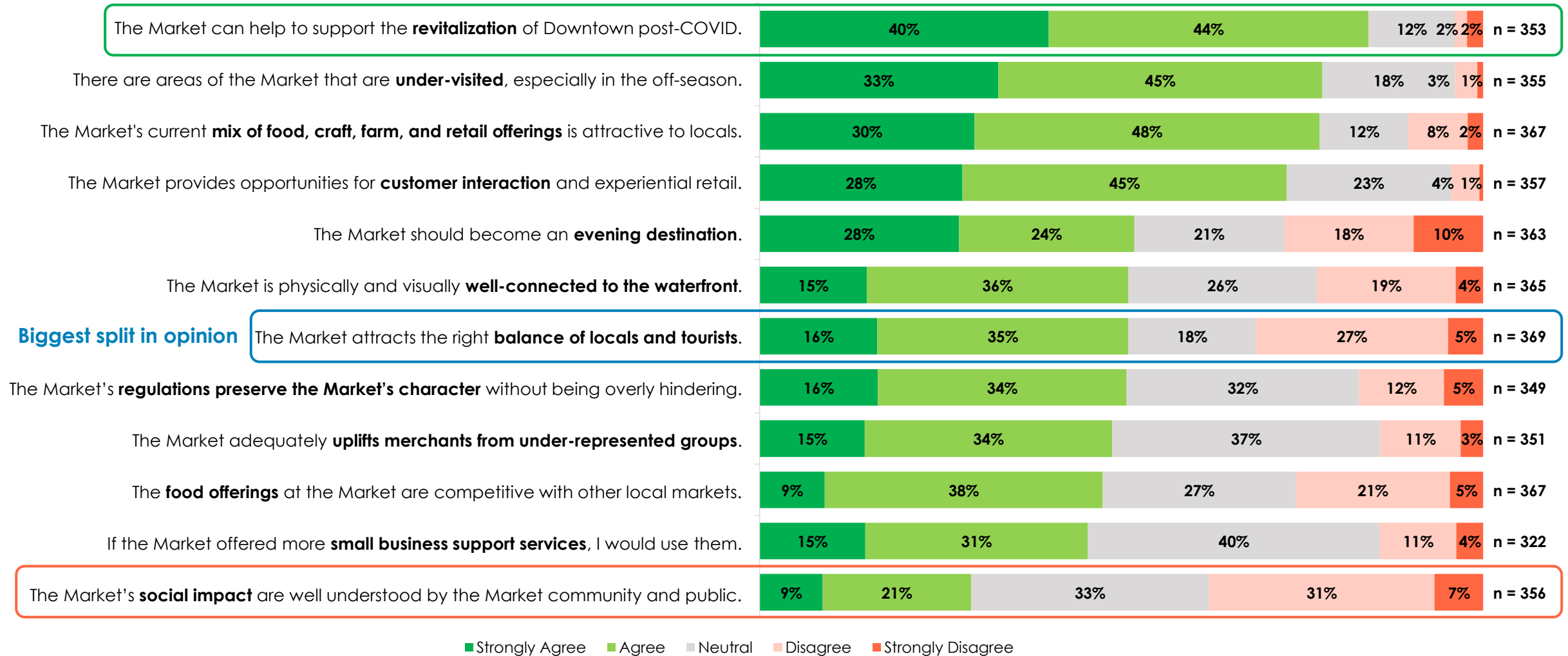
- Live at the Market
- Food and retail workers
- Social service providers
- Commercial business owners
- Tenants in non-PDA buildings
- Craft and farm agents
- Craft permit holders
- Farm permit holders
- Busker permit holders

Note: Statements in the following charts were edited slightly for presentation purposes. See the Survey Instrument for exact wording.

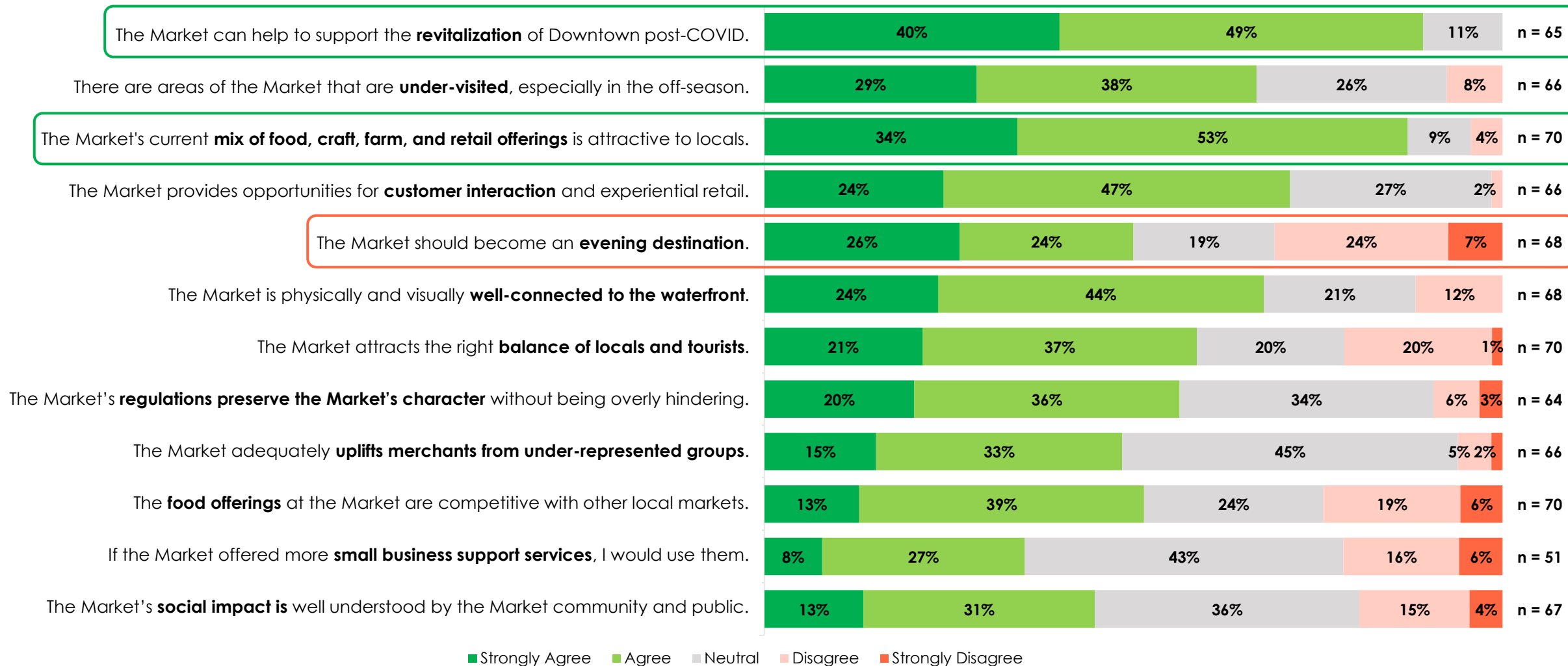
Topline Results

- Across and within all market affiliations, **over 70% agreed or strongly agreed** that the Market can help to support the **revitalization of Downtown** post-COVID.
- Respondents generally **disagreed or strongly disagreed** that **locals understand the Market's social impact**.
- **Respondents were split** on whether the Market is attracting the right **balance of locals and tourists** and **if the Market should become an evening destination**.

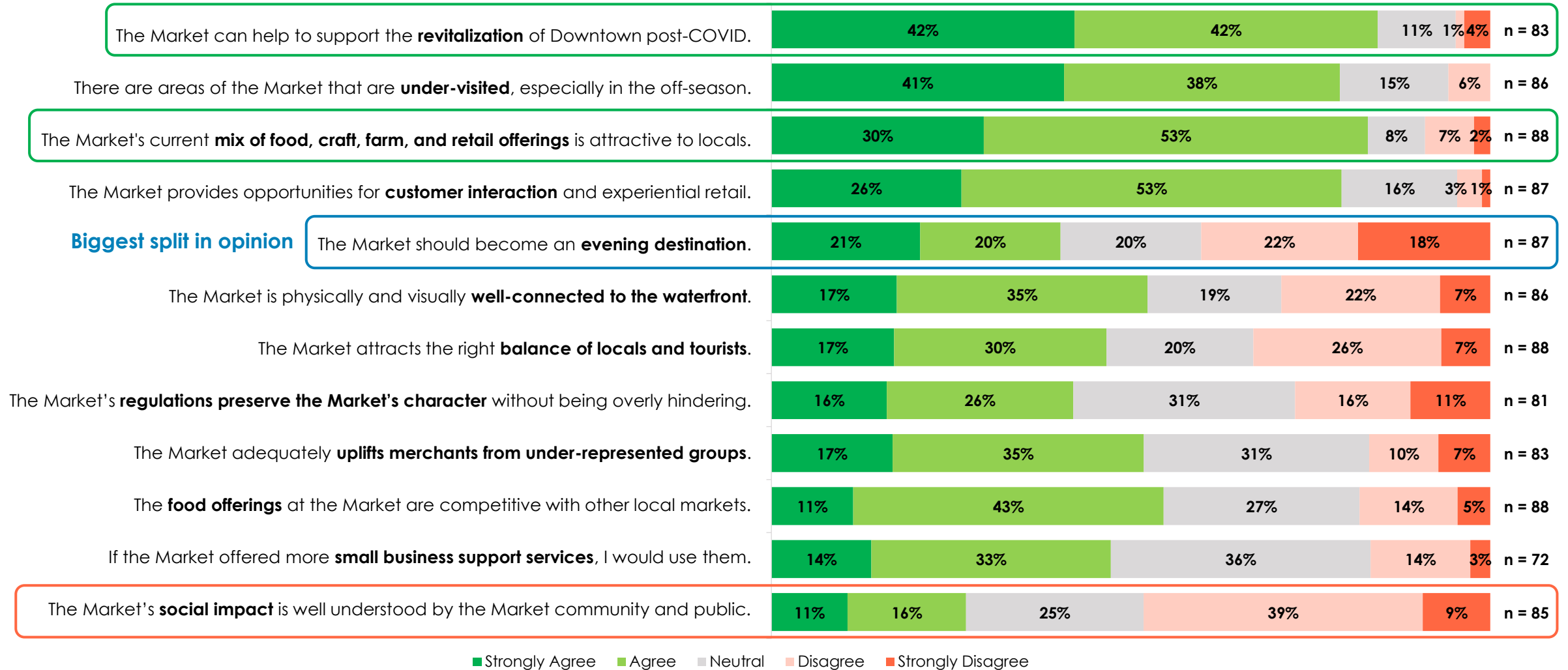
Across all affiliations, there is most agreement to **revitalization of Downtown** and most disagreement to **local understanding of the Market's social impact**.



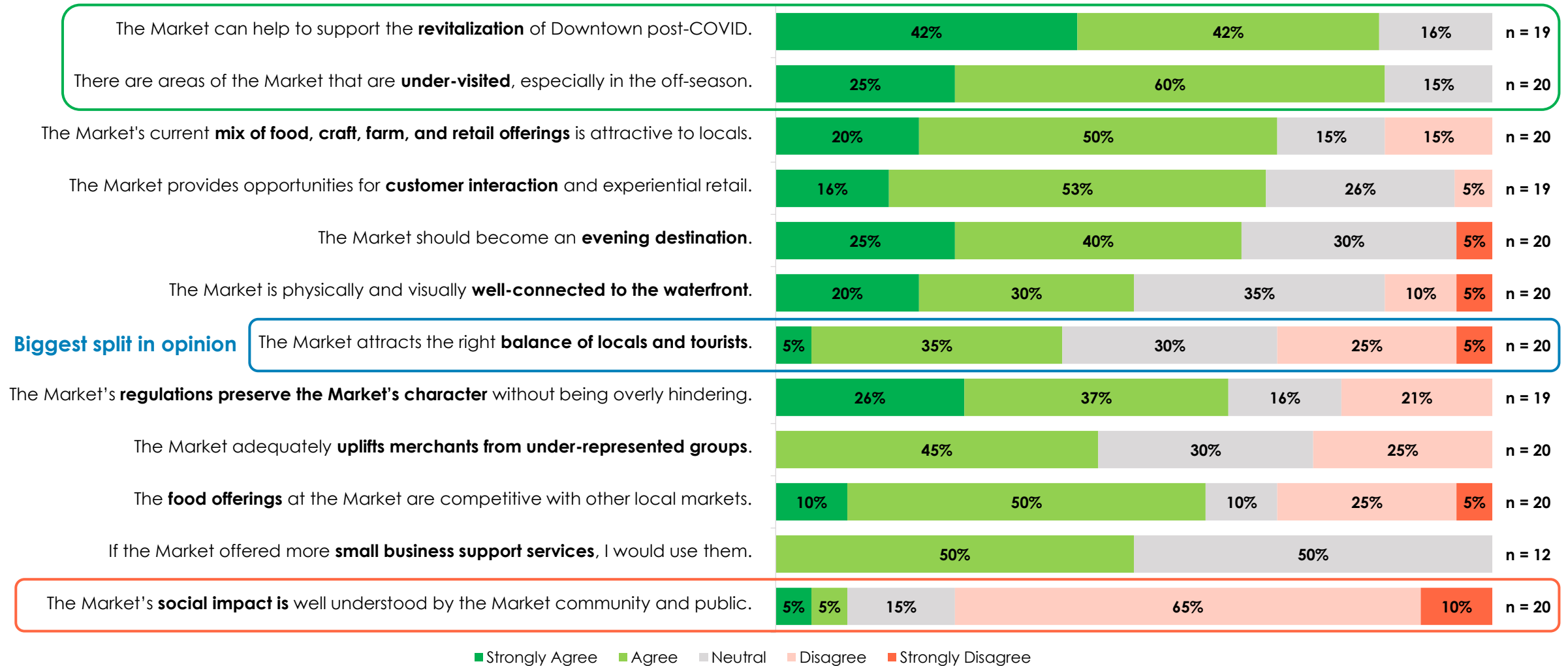
Among those who live at the Market, there is most agreement to **revitalization** and **mix of offerings** and most disagreement to **the Market as an evening destination**.



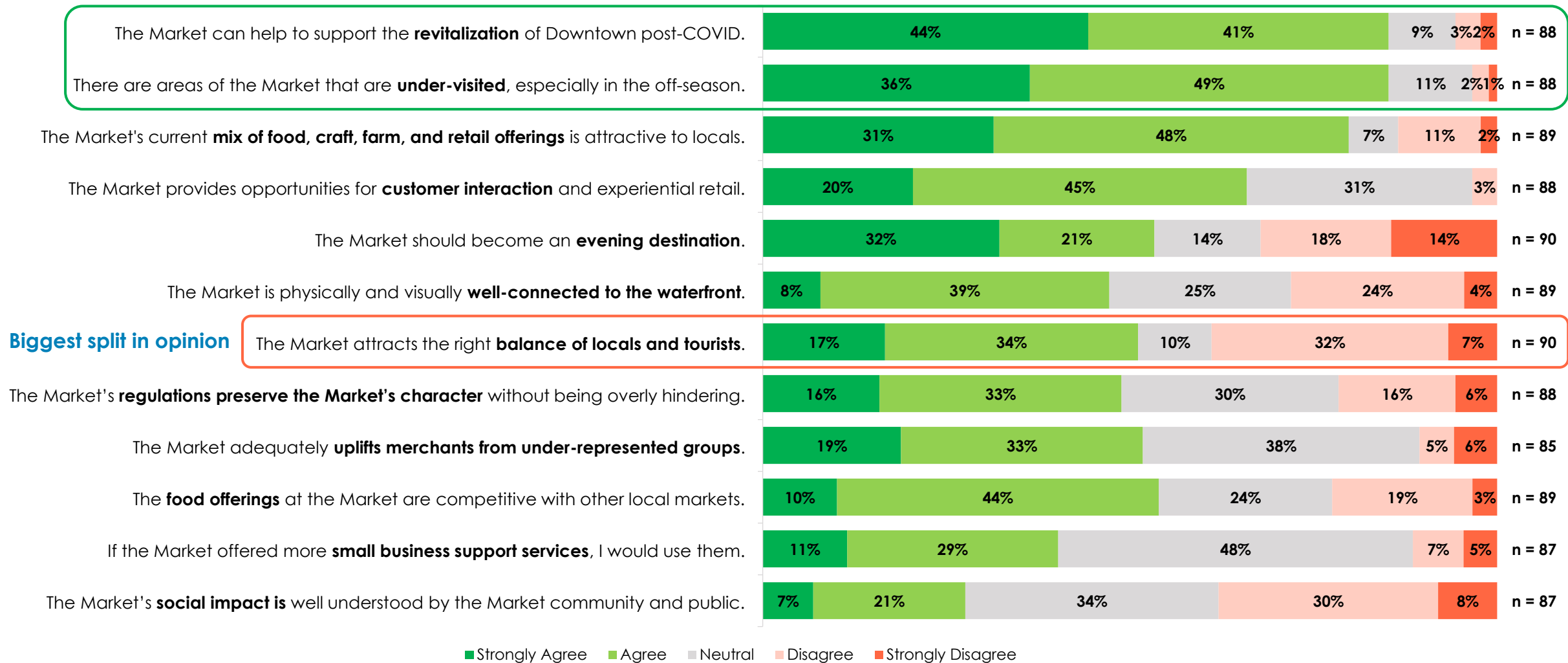
Among food and retail workers, there is most agreement to **revitalization** and **mix of offerings** and most disagreement to **local understanding of social impact**.



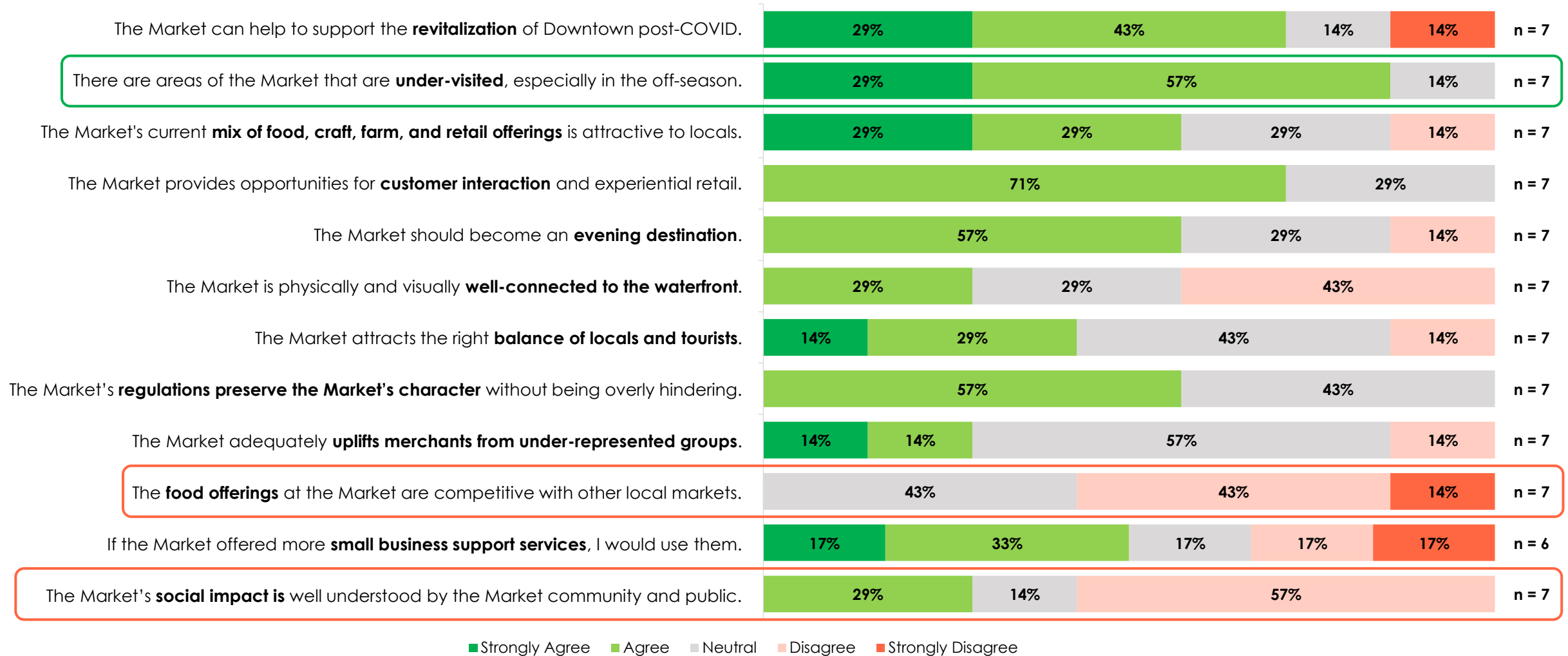
Among social service providers, there is most agreement to **under-visited areas** and **revitalization** and most disagreement to **local understanding of social impact**.



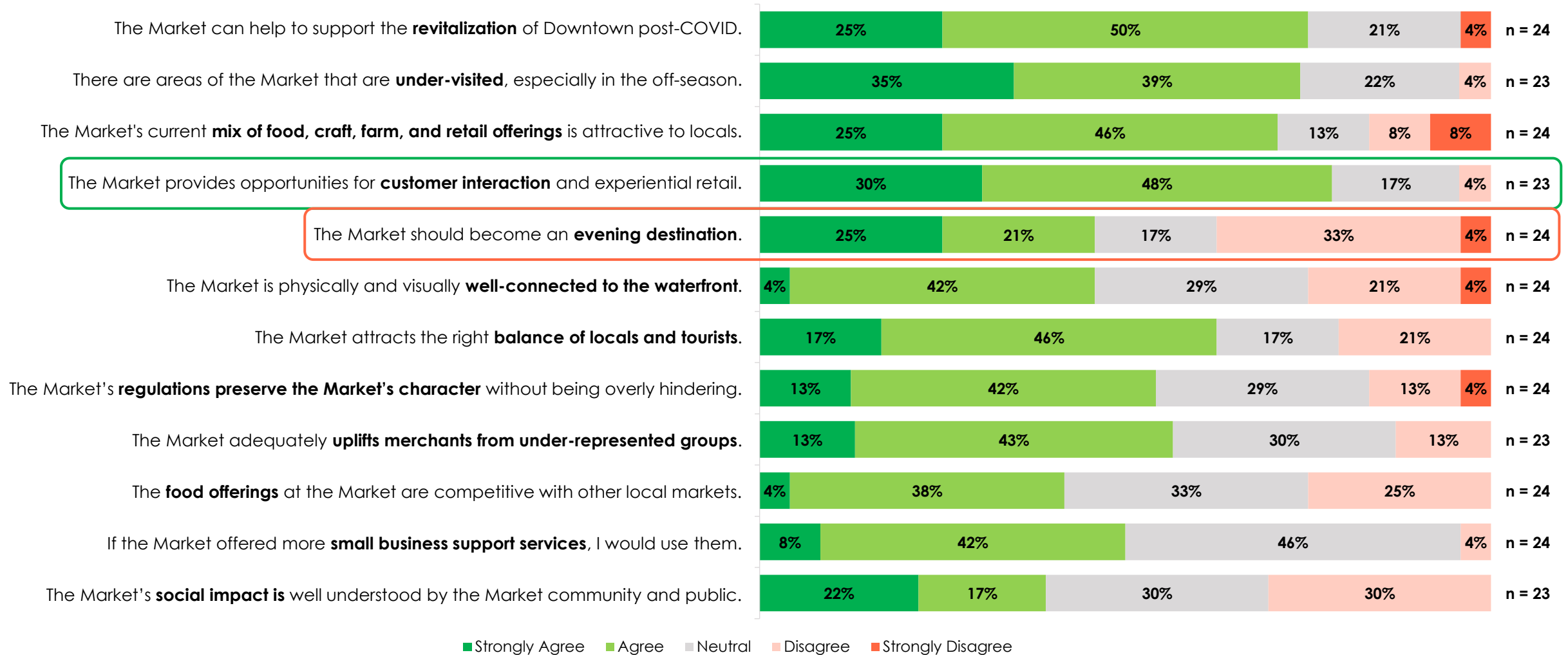
Among commercial business owners, there is most agreement to **revitalization** and **under-visited areas** and most disagreement to **balance of locals and tourists**.



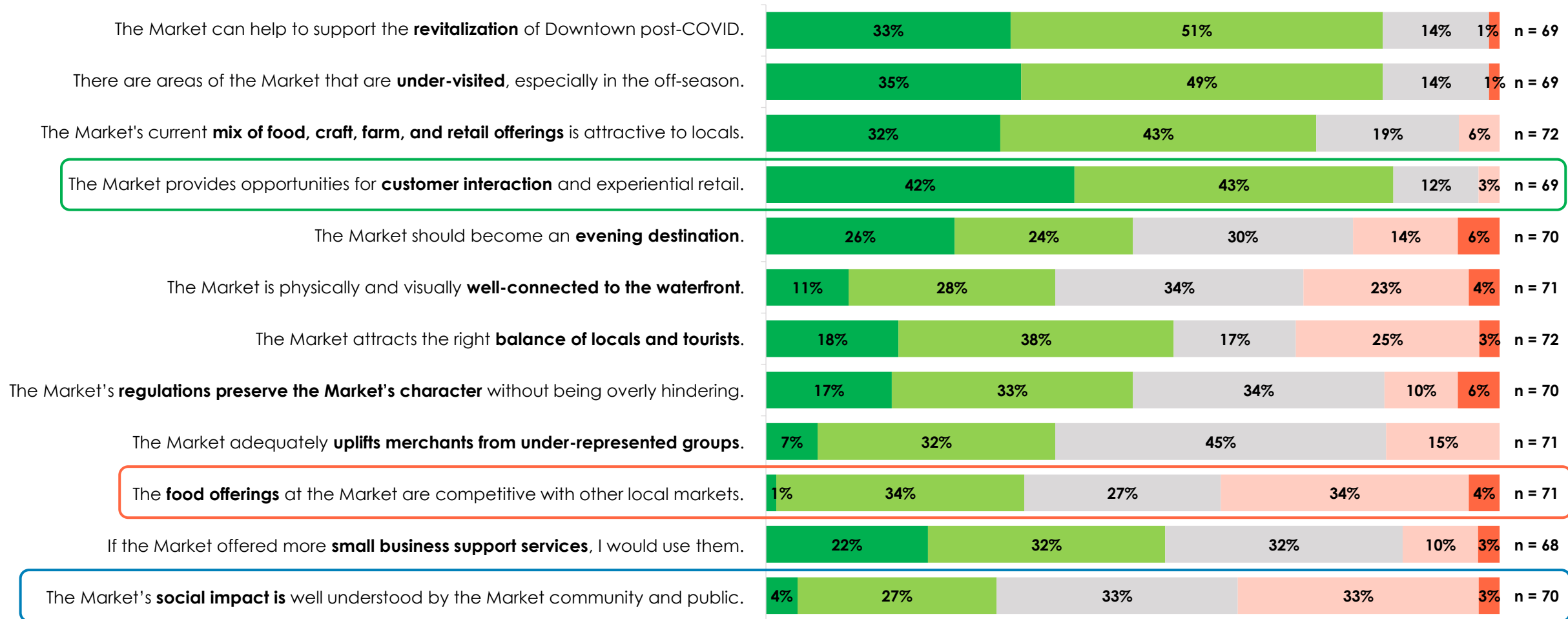
Among tenants in non-PDA buildings, there is most agreement to **under-visited areas** and most disagreement to **competitive food offerings** and **understanding of impact**.



Among craft and farm agents, there is most agreement to **customer interaction** and most disagreement to **the Market as an evening destination**.



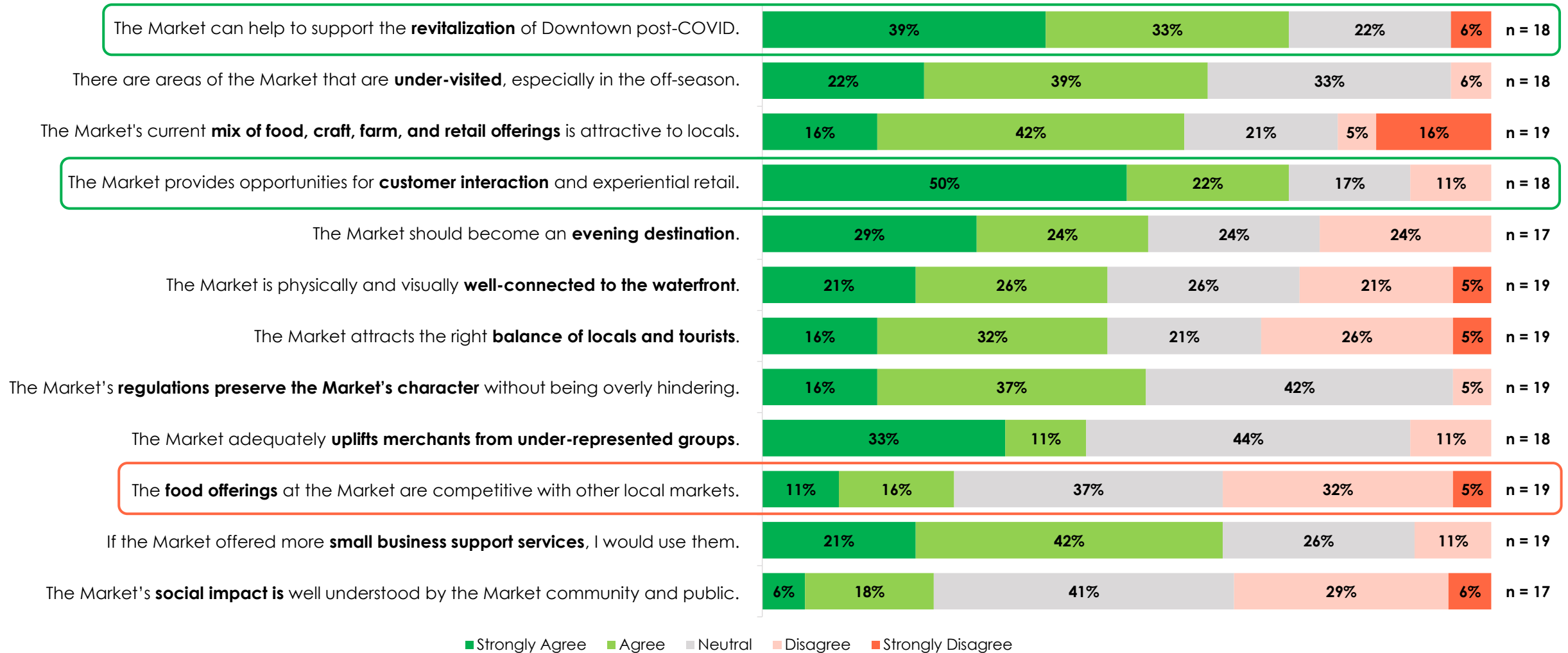
Among craft permit holders, there is most agreement to **customer interaction** and most disagreement to **competitive food offerings**.



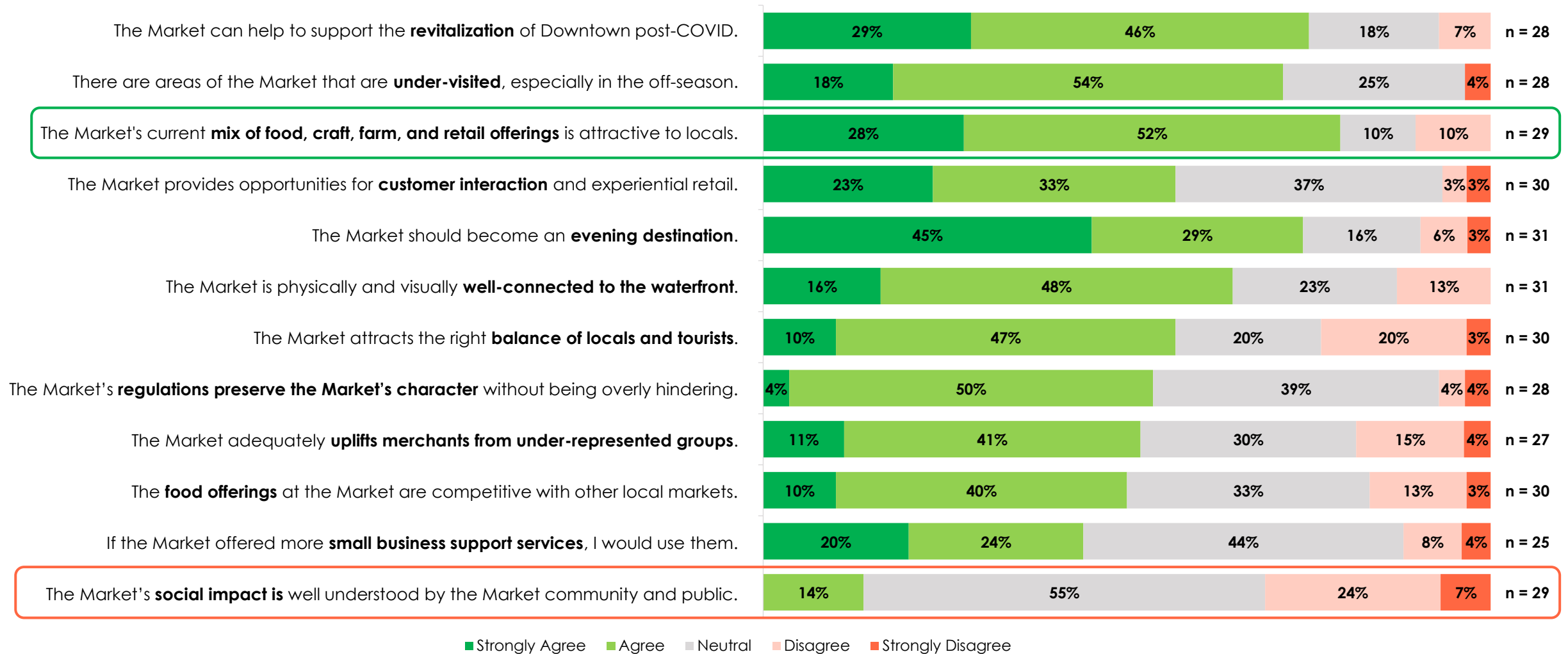
Biggest split in opinion

■ Strongly Agree
 ■ Agree
 ■ Neutral
 ■ Disagree
 ■ Strongly Disagree

Among farm permit holders, there is most agreement to **revitalization** and **customer interaction** and most disagreement to **competitive food offerings**.



Among busker permit holders, there is most agreement to **attractive mix of offerings** and most disagreement to **local understanding of the Market's social impact**.



Focus of the Pike Place Market Master Plan

Survey respondents were asked to **select up to three statements they believe should be a focus of the Pike Place Market Master Plan.**

Analysis Overview

We analyzed respondents' top statements both in aggregate and categorized them based on the following market affiliations:

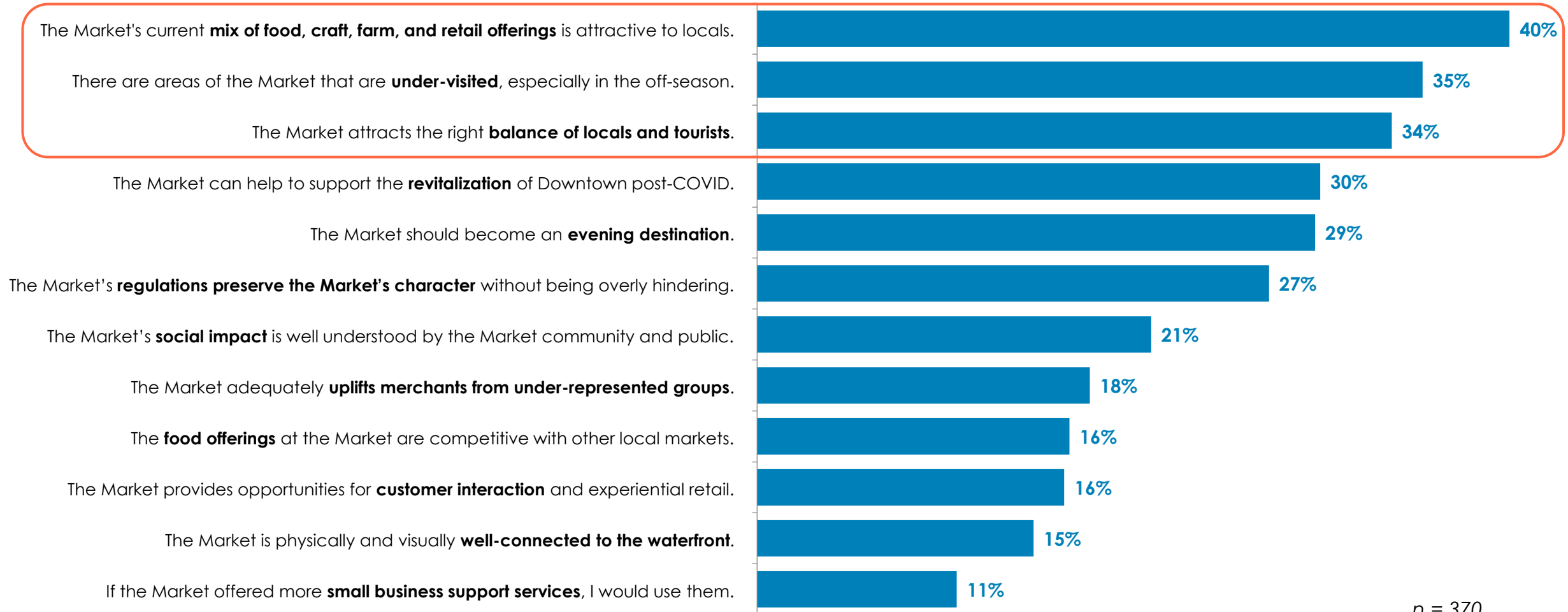
- Live at the Market
- Food and retail workers
- Social service providers
- Commercial business owners
- Tenants in non-PDA buildings
- Craft and farm agents
- Craft permit holders
- Farm permit holders
- Busker permit holders

Note: Statements in the following charts were edited slightly for presentation purposes. See the Survey Instrument for exact wording.

Topline Results

- Respondents most wanted the Master Plan to focus on:
 - The mix of offerings to **attract locals**
 - **Under-visited areas**, especially in the off-season
 - Right **balance of locals and tourists**
- Other statements specific to affiliation subsets (indicated in parentheses):
 - **Regulations that preserve the Market's character** without being overly burdensome (craft and farm agents and permit holders)
 - Market becoming an **evening destination** (busker permit holders)
 - **Local understanding of social impact** (social service providers)
 - **Uplifting merchants** from under-represented groups (social service providers)

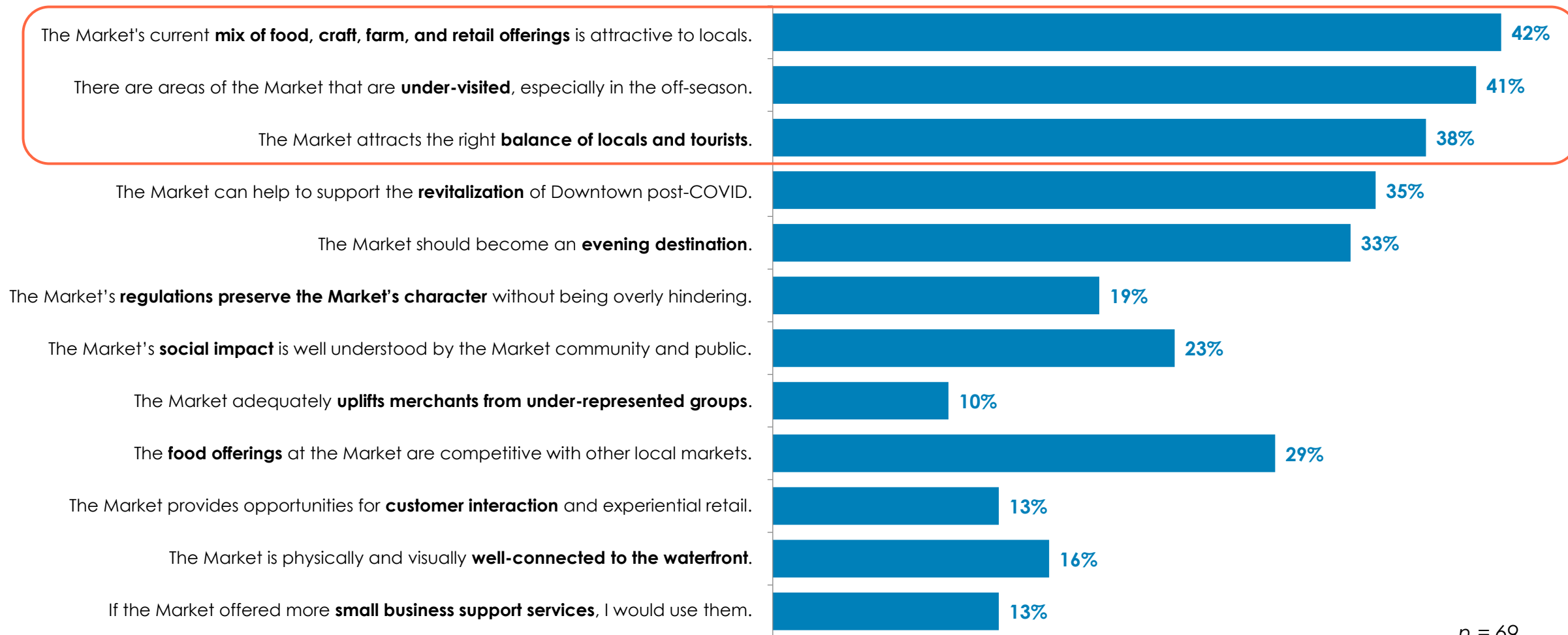
Across all affiliations, the top desired focus areas for the Master Plan are **attractive mix of offerings, under-visited areas, and balance of locals and tourists.**



n = 370

Note: Respondents could select more than one option.

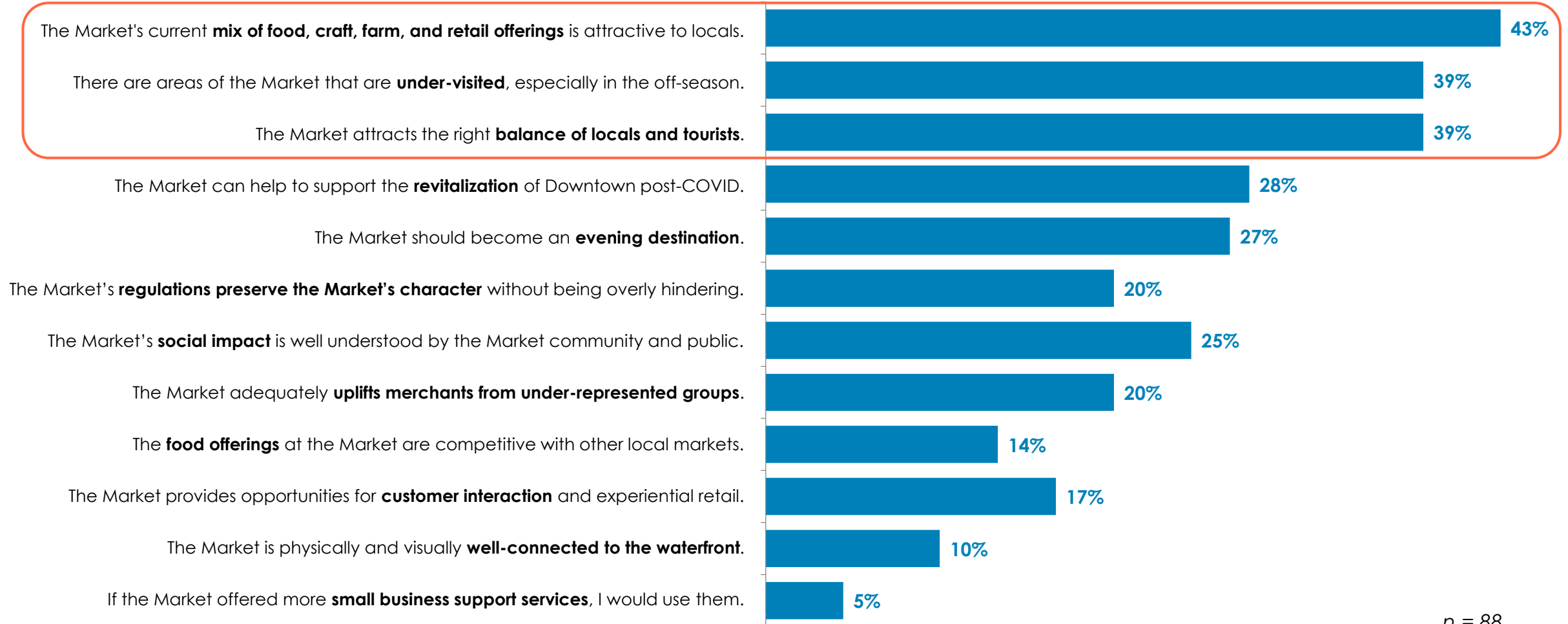
Among those who live at the Market, the top desired focus areas are **attractive mix of offerings**, **under-visited areas**, and **balance of locals and tourists**.



n = 69

Note: Respondents could select more than one option.

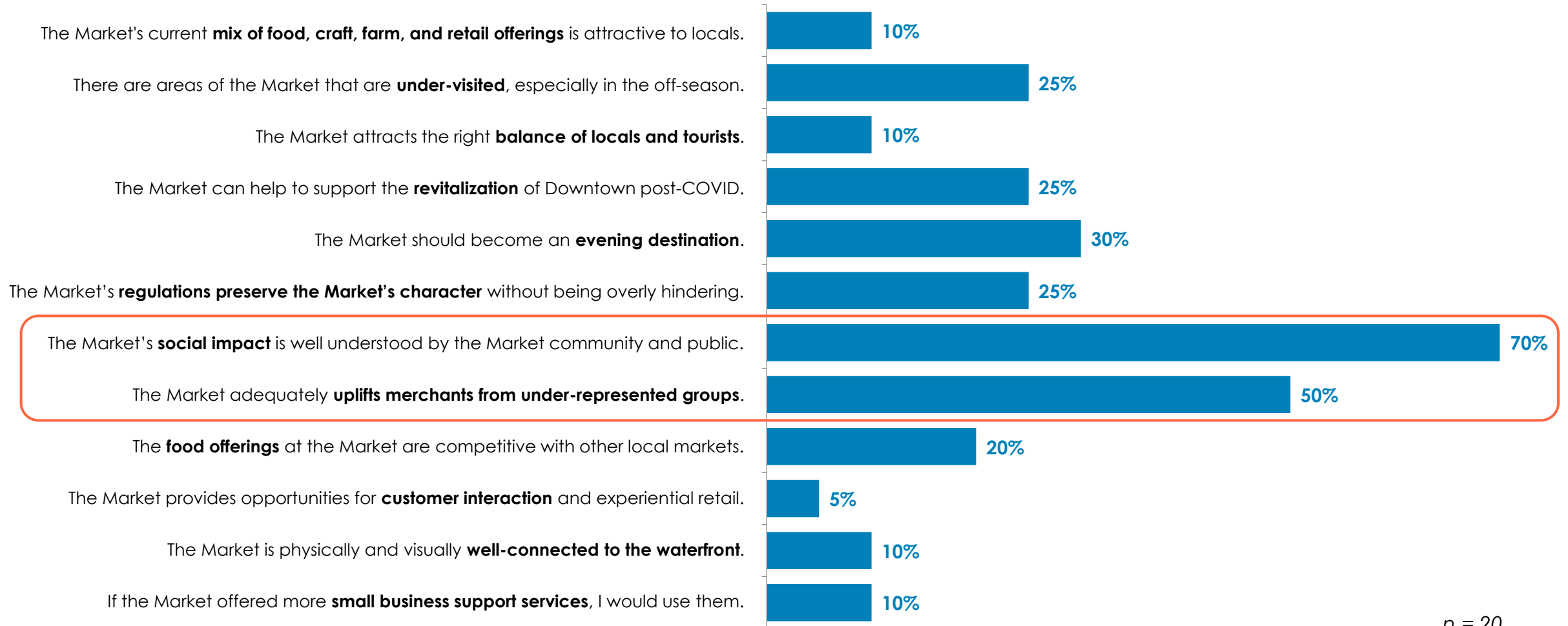
Among food and retail workers, the top desired focus areas are **attractive mix of offerings**, **under-visited areas**, and **balance of locals and tourists**.



n = 88

Note: Respondents could select more than one option.

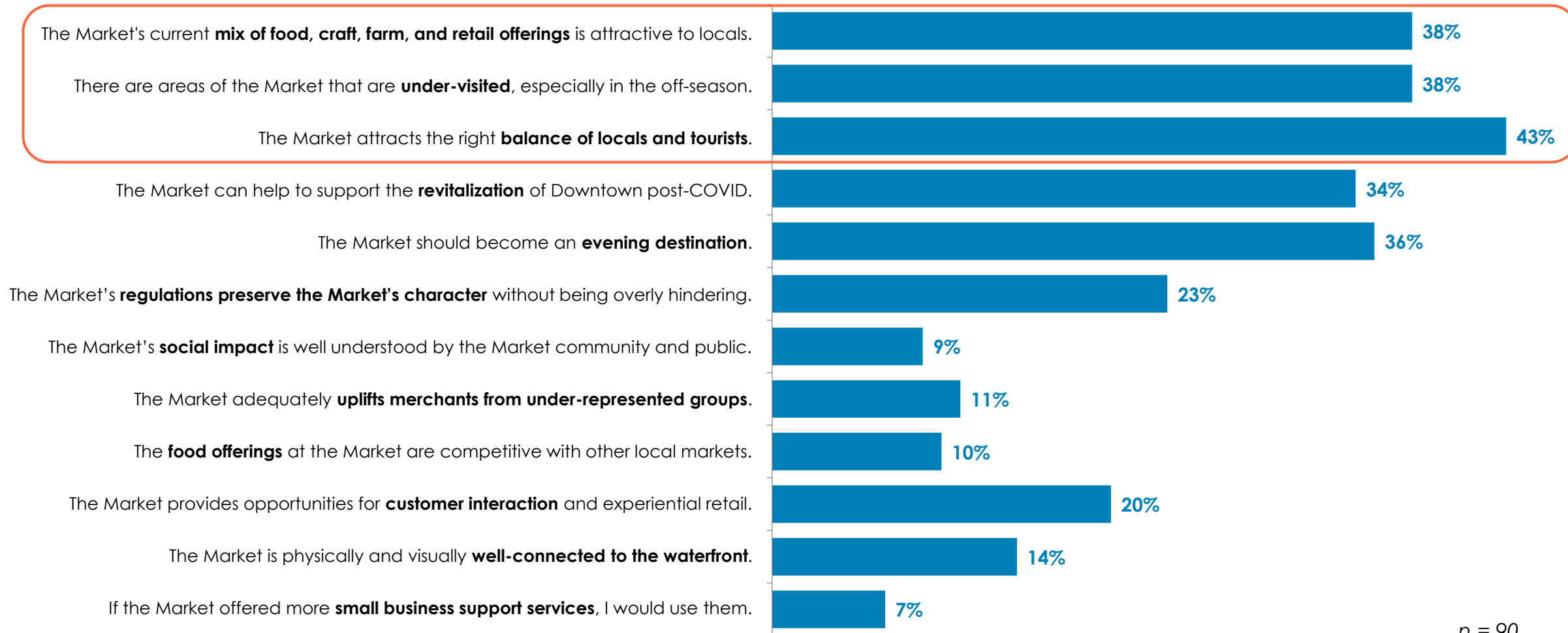
Among social service providers, the top desired focus areas are **local understanding of the Market's social impact** and **uplifting merchants from underrepresented groups**.



n = 20

Note: Respondents could select more than one option.

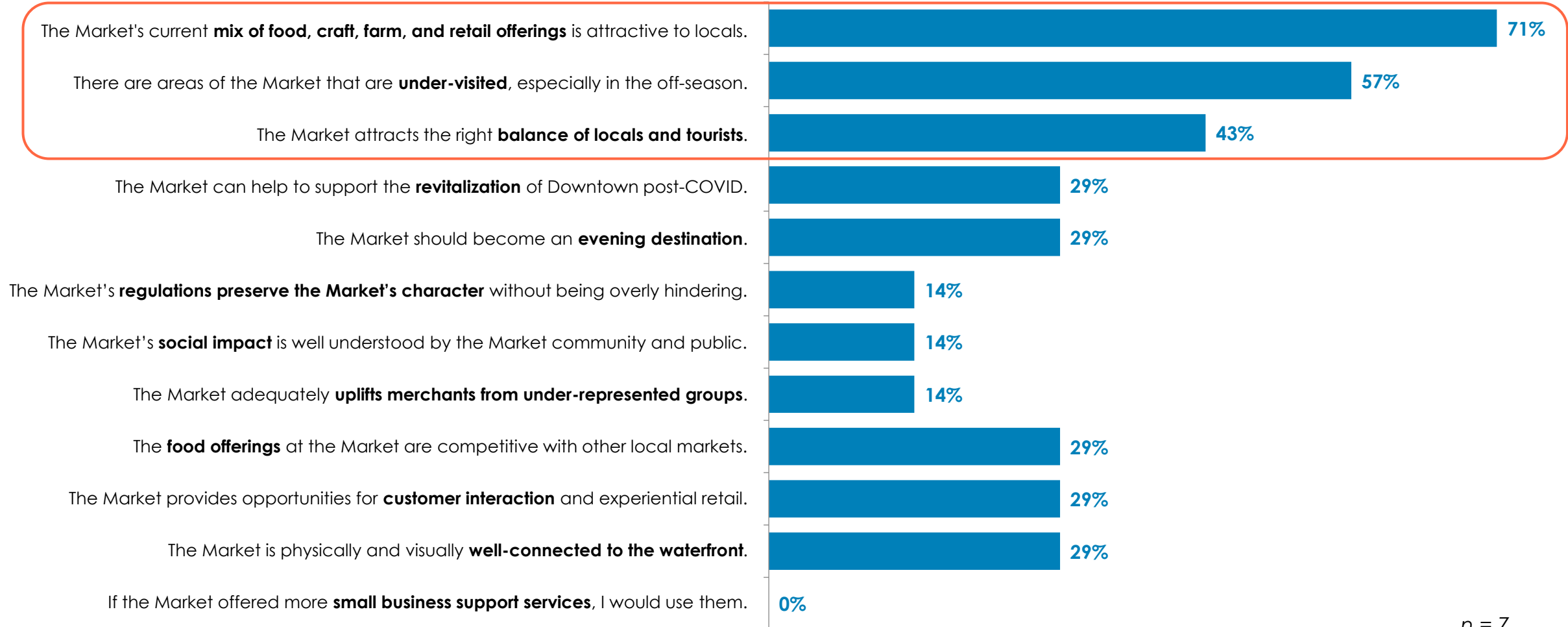
Among commercial business owners, the top desired focus areas are **attractive mix of offerings**, **under-visited areas**, and **balance of locals and tourists**.



n = 90

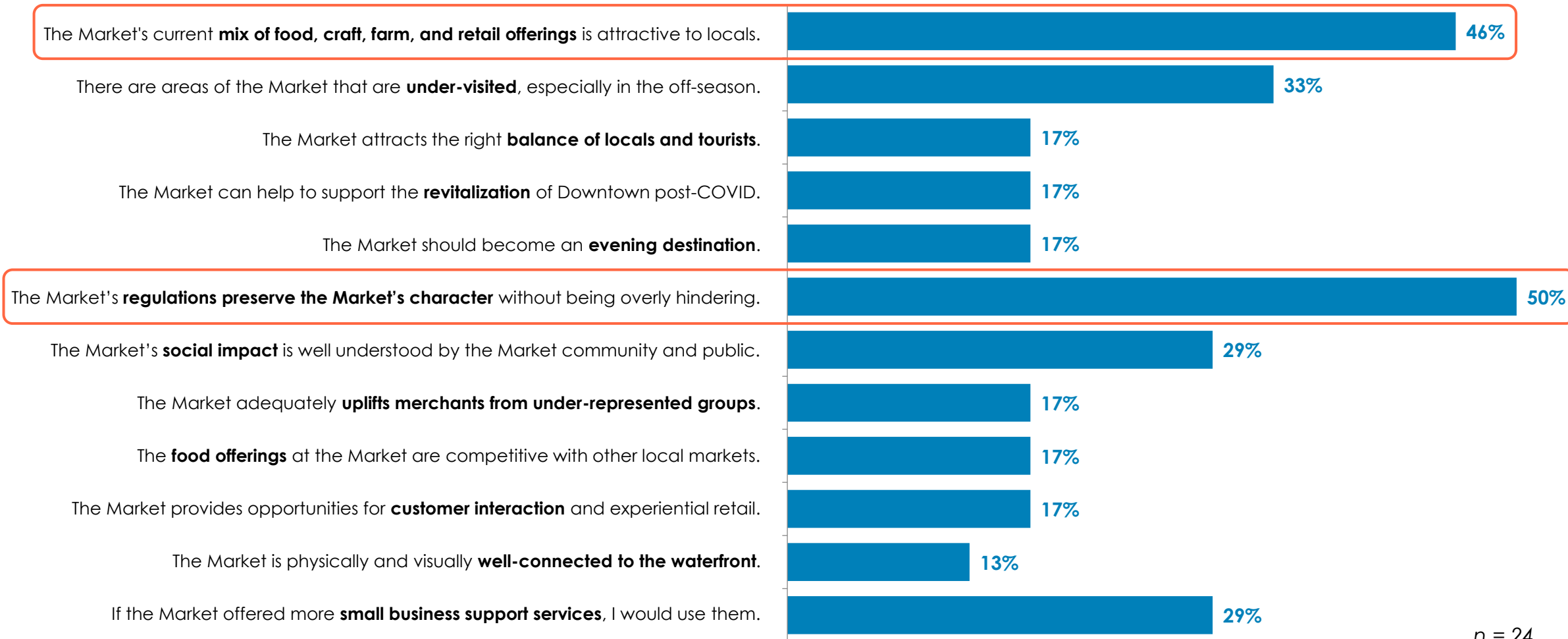
Note: Respondents could select more than one option.

Among tenants in non-PDA buildings, the top desired focus areas are **attractive mix of offerings**, **under-visited areas**, and **balance of locals and tourists**.



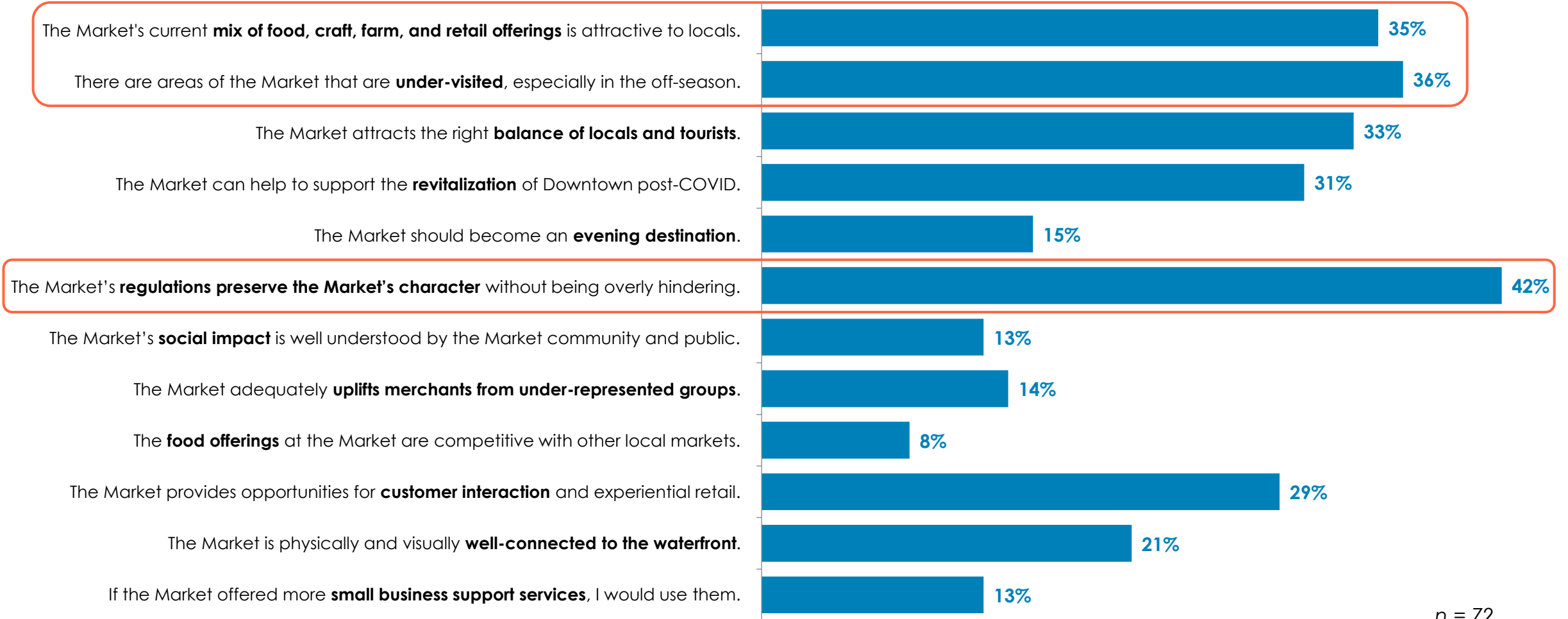
n = 7
 Note: Respondents could select more than one option.

Among craft and farm agents, the top desired focus areas are **ensuring regulations that preserve the Market's character** and **attractive mix of offerings**.



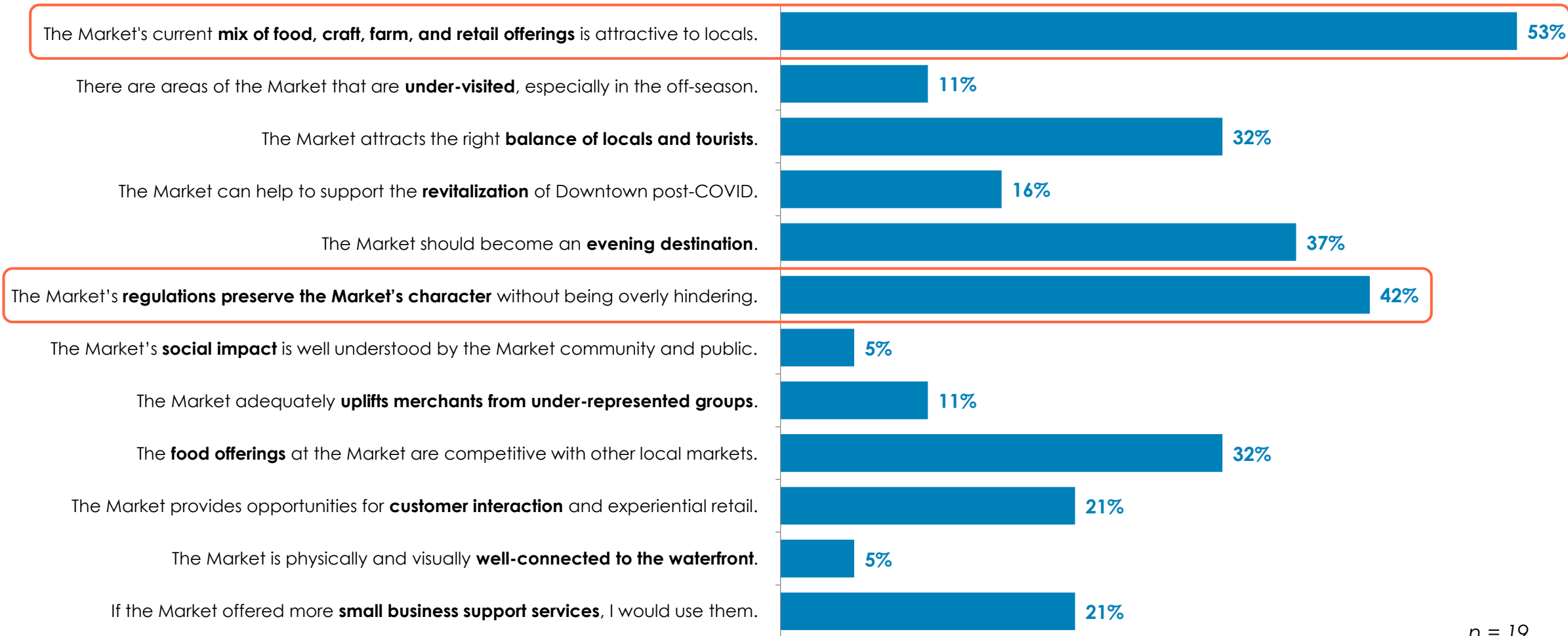
n = 24
 Note: Respondents could select more than one option.

Among craft permit holders, the top desired focus areas are **ensuring regulations that preserve the Market's character**, **under-visited areas**, and **attractive mix of offerings**.



n = 72
 Note: Respondents could select more than one option.

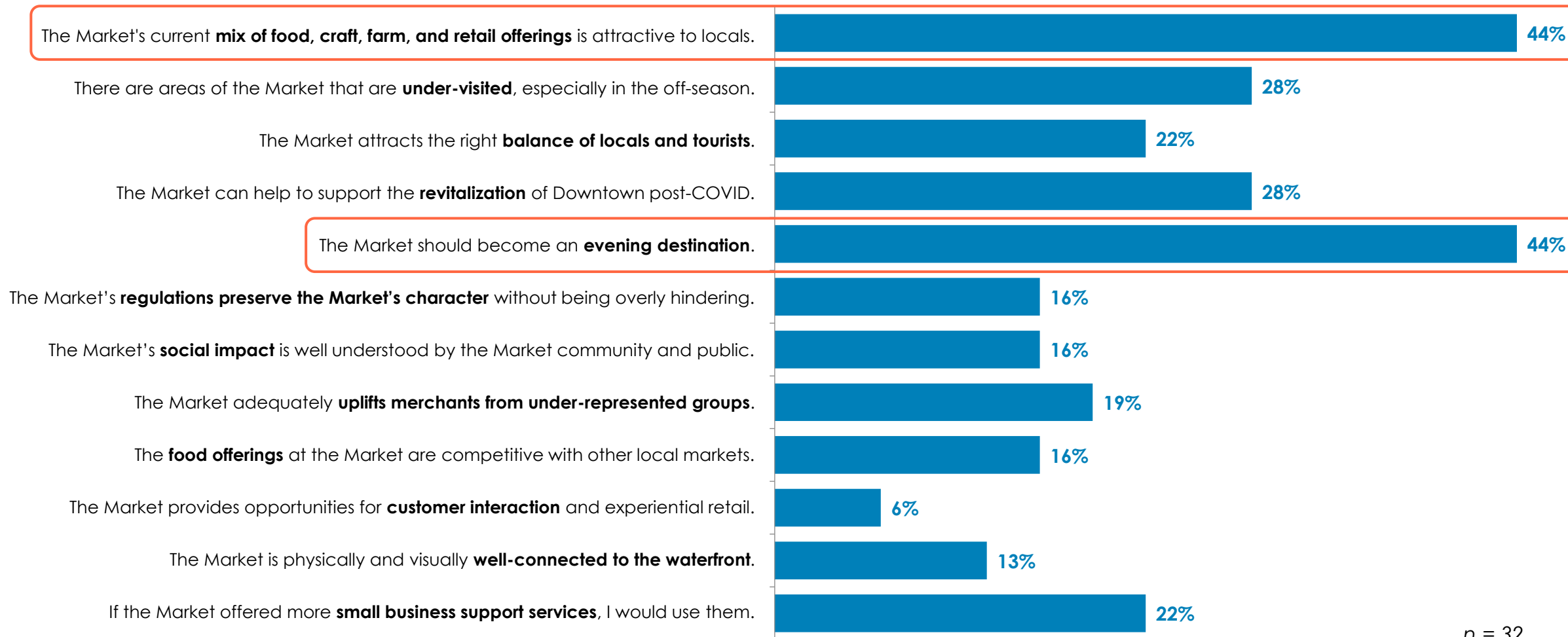
Among farm permit holders, the top focus areas were **attractive mix of offerings** and **ensuring regulations that preserve the Market's character**.



n = 19

Note: Respondents could select more than one option.

Among busker permit holders, the top focus areas were **attractive mix of offerings** and **the Market becoming an evening destination**.



n = 32

Note: Respondents could select more than one option.

Open-Ended Questions

Survey respondents were asked **three open ended questions** around better **support, opportunities, and vision**.

Themes Across all Open-Ended Questions

- Continued emphasis on **safety and security** at and around the Market
- Desire to see more **cleaning or maintenance** done at the Market

How can Pike Place Market better support you as a business owner, service provider, permit holder, employee, or resident?

- Top comments included:
 - Ideas for providing **support for businesses** like training, wifi, and ideas to support buskers
 - Expressing a desire for consistent and reliable **communication** from PDA staff
 - Various requests for the **governance** of the Market, including daystall rules, lease provisions, and other rules at the Market
 - **More marketing** to create demand for products and draw in locals

Business support	38
Communication	30
Governance	29
Marketing	27
Praise	24
Security	21
Affordability	15
Parking	15
Maintenance	14
Street	14
Physical	12
Evening	9
Employee benefits	8
Tenant mix	8
Accessibility	5
Farmers	5
Programming	5
Wayfinding	5
N/A	4
Other	4
Total	292

Quotes

*“It would be amazing if the market had a **small business liaison** that could help market businesses & permit holders navigate things like taxes, health insurance, etc.”*

*“We need **more face time with Market managers** - visiting shops, introducing themselves and talking to people, observing how things are done, seeing the good and bad for themselves. There needs to be better/mandated response time to business owners' inquiries.”*

*“The **historic preservation can be too limiting**. I know of one instance where a Black business owner was denied a stall because it historically only sold fruit. I believe it's important to identify areas where historic preservation locks out communities who should be represented and who weren't, historically.”*

Thinking beyond day-to-day operations, what are the major opportunities for the Market? What are your big ideas for ensuring the Market thrives in the years ahead?

- Top comments included:
 - Desire to see **more locals** visiting the Market
 - Ideas on and support for **programming and events**
 - Support for having Pike Place be an **evening destination**
 - Opinions on the usage of **Pike Pl. Street**

Locals	29
Programming and events	28
Evening destination	24
Street	20
Marketing	18
Small business	17
N/A	14
Maintenance	13
Waterfront	13
Security	11
Farmers	10
No change	10
Physical	10
Preservation	10
Tenant mix	9
Business Support/Operations	8
DEI	7
Wayfinding	7
Other	6
Parking	5
Affordability	3
Employee benefits	3
Partnerships	3
Sustainability	2
Total	280

Quotes

“An authentic Pike Place Market **should be a place locals want to go** to for groceries and one-of-a-kind gifts and a place where farmers want to sell their produce. The balance between tourists and locals has been skewed to the point where we have to cater to one. The challenge is that there is more money with tourism and that will win every time. If you can't sell to the tourist, you can't thrive.”

“It would help to **market festival events** better (upcoming Oktoberfest, maybe do a German-themed Christkindlesmarket, Latino Dia de Los Muertos, etc. celebrating different cultures, and sub-cultures.”

“Have **inviting evening locations, food stalls and seating** with appropriate music, covered and perhaps even heated as the days grow shorter.”

What does a sustainable, equitable, and authentic Pike Place Market look like to you? What are the challenges to this?

- Top comments included:
 - Emphasizing the importance of **small businesses** at the Market, including maintaining “Meet the Producer”
 - **Praise for the Market** as it currently is
 - Comments about the **importance of affordability** for many communities at the Market

Small business/Meet the Producer	29
Praise	17
N/A	14
Affordability	13
Security/safety	13
No change	12
Preservation	12
Governance	11
Communication	10
Locals	10
Other	10
Sustainability	10
DEI	8
Economic stability	8
Tenant mix	7
Maintenance	6
Atmosphere	5
Marketing	5
Street	5
Farmers	4
Seating	4
Social services	4
Physical	3
Programming	3
Partnerships	2
Wayfinding	2
Evening	1
Total	228

Quotes

“Keeping the small business and meet the producer in forefront of the retail principle --the handmade craft aspect, home grown farm aspect makes PPM Unique and a colorful destination. Treat the community members as family and individuals who sometime need different personal support than a corporate entity does, especially as they age and have devoted lives to market. keep a personal aspect to dealings at the Market. Keep things HUMANE.”

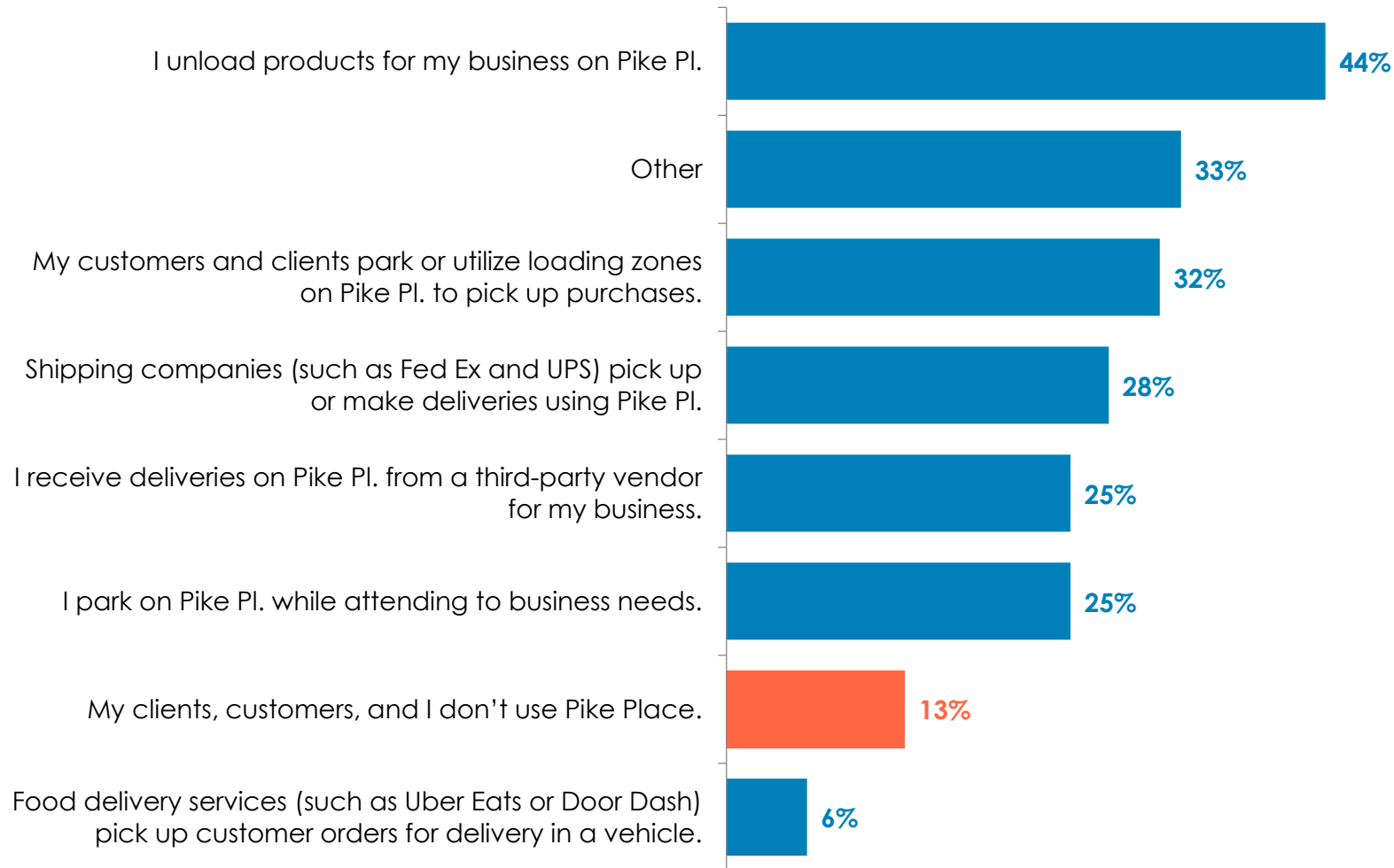
“Overall, I think the **Market we have now is quite close to ideal.** I believe the most important thing going forward is to focus on maintaining this truly incredible community we share, not only that but to also ensure a great experience for each & every visitor.”

“Keep rents for all businesses: commercial tenants, daystalls and low income house **affordable.**”

Use of Pike Pl.

Survey respondents were asked various questions on how they or their clients **use and access Pike Pl. street.**

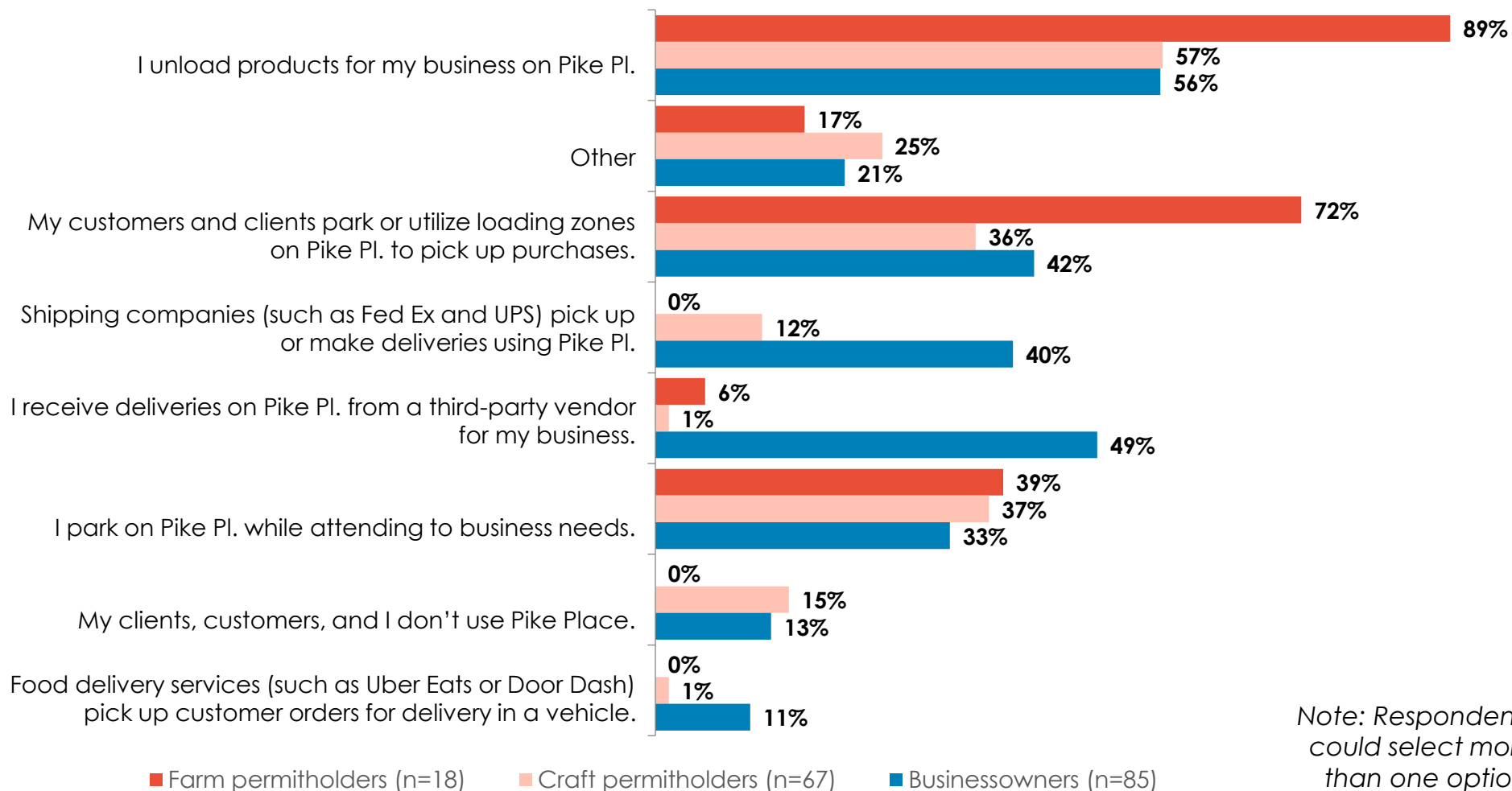
Most survey respondents use Pike Pl. for business needs, from **load/unload** to **delivery** to **parking**



- Top “other” responses included:
 - Walking
 - Busking
 - Expressing an opinion on the street usage
 - Parking

n = 321
Note: Respondents could select more than one option.

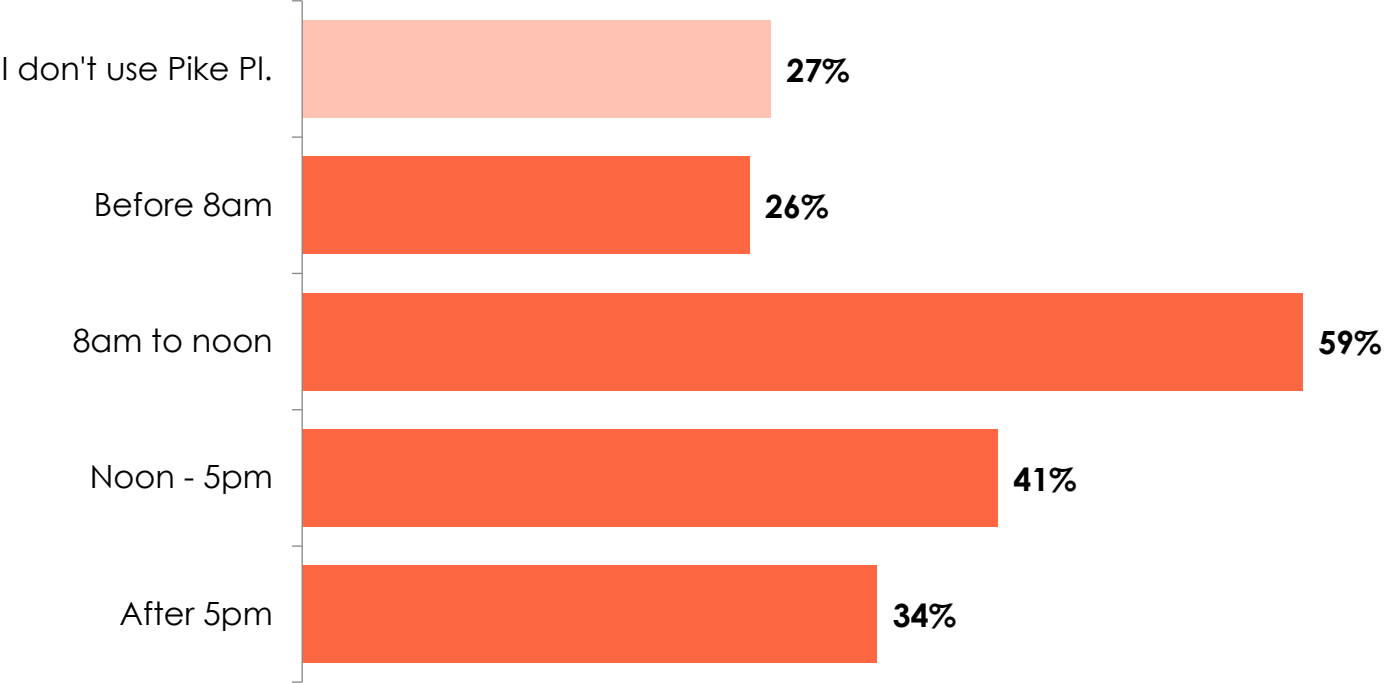
Most farm permit holders, craft permit holders, and commercial business owners use Pike Pl. for **unloading products**.



Note: Respondents could select more than one option.

Pike Pl. is accessed throughout the day and **most frequently from 8am to noon among survey respondents**

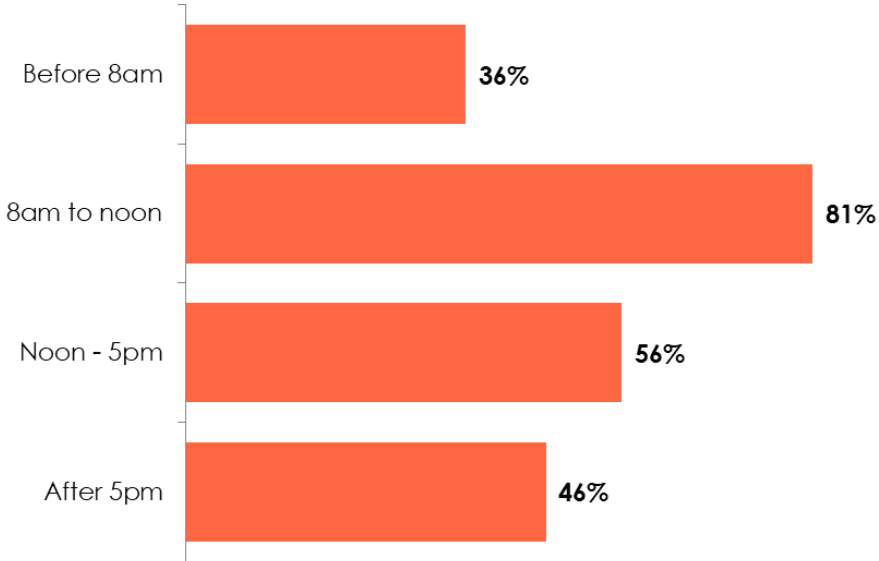
All Respondents



n = 241

Note: Respondents could select more than one option.

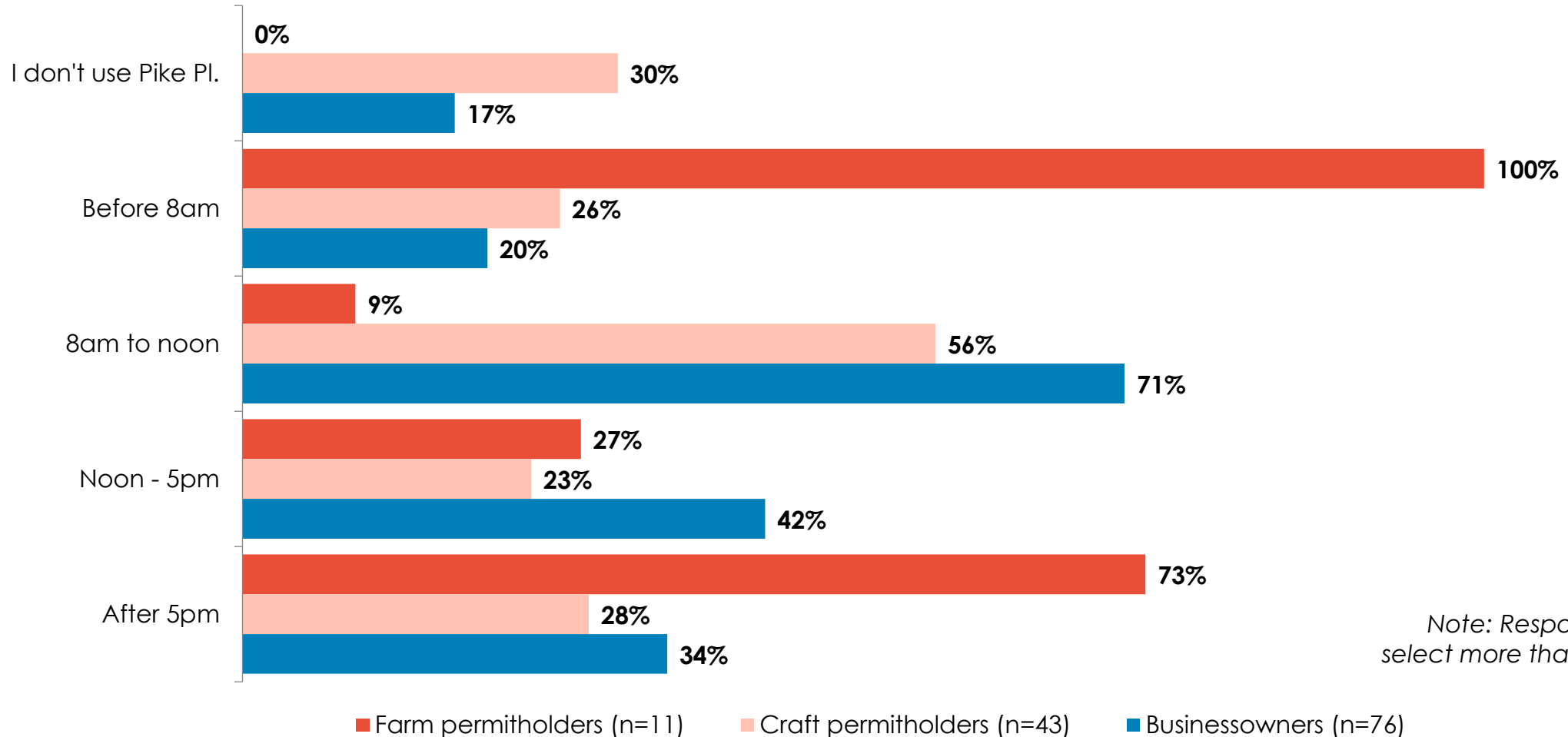
Respondents that Access Pike Place



n = 175

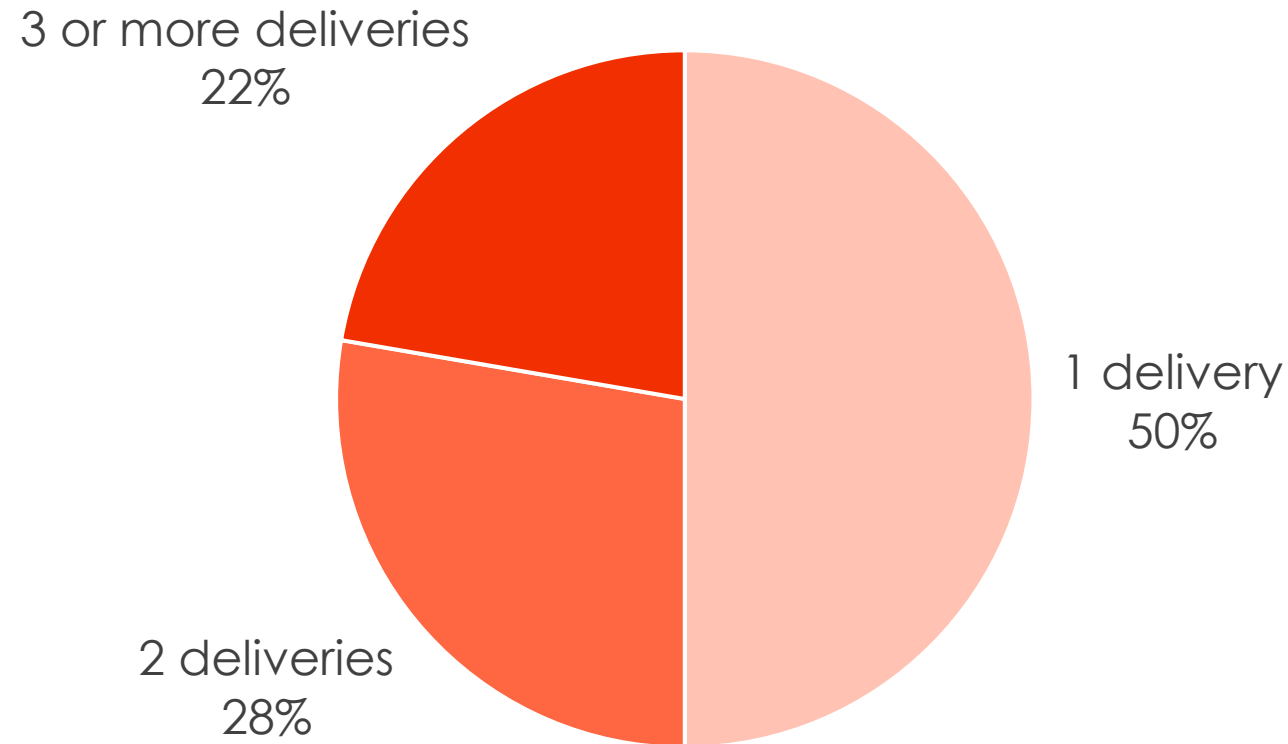
Note: Excludes respondents who selected "I don't use Pike Pl."

Farm permit holders most frequently access Pike Pl. before 8am, while most craft permit holders and commercial business owners access from 8am to noon.



Note: Respondents could select more than one option.

78% of those who use Pike Pl. for business needs receive 1 to 2 deliveries per day

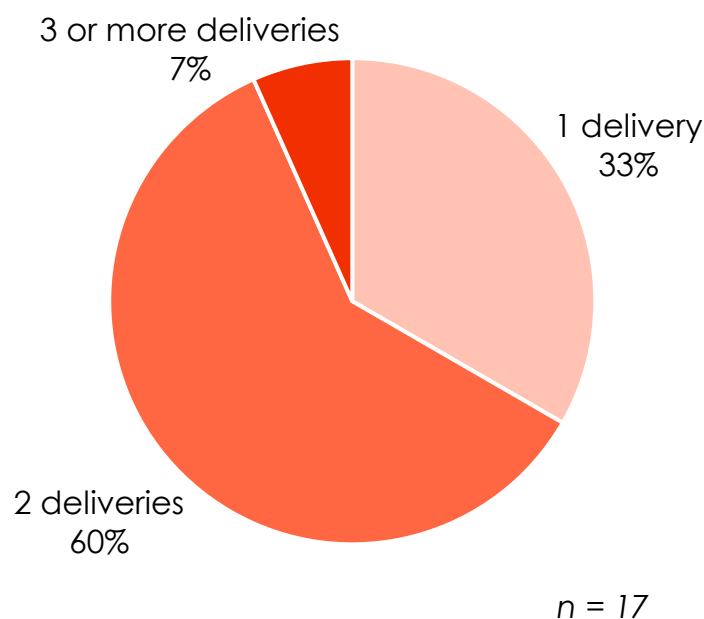


n = 148
Note: Excludes respondents who selected "I don't use the Pike Pl. for deliveries or load/unload of products."

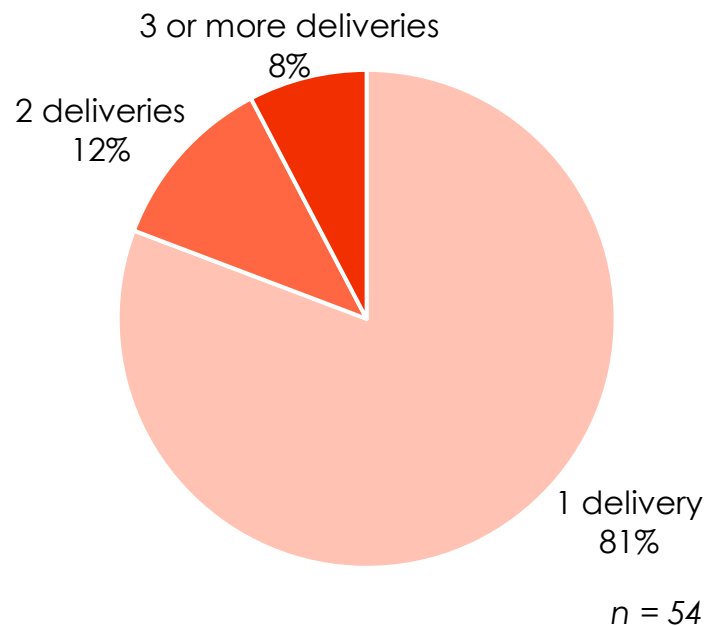
Farm permit holders frequently receive 2 deliveries per day on Pike Pl., compared to 1 delivery for craft permit holders and commercial business owners.

Note: Excludes respondents who selected "I don't use Pike Pl. for deliveries or load/unload of products."

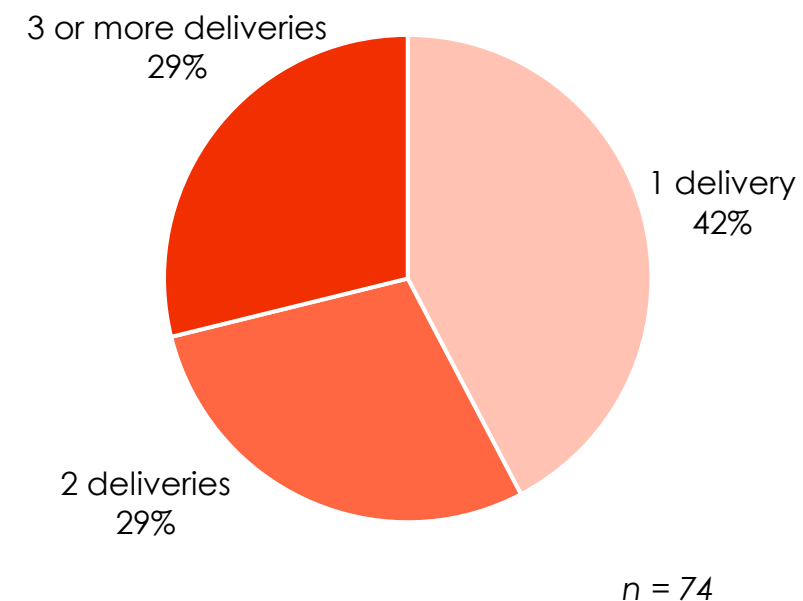
Farm permit holders



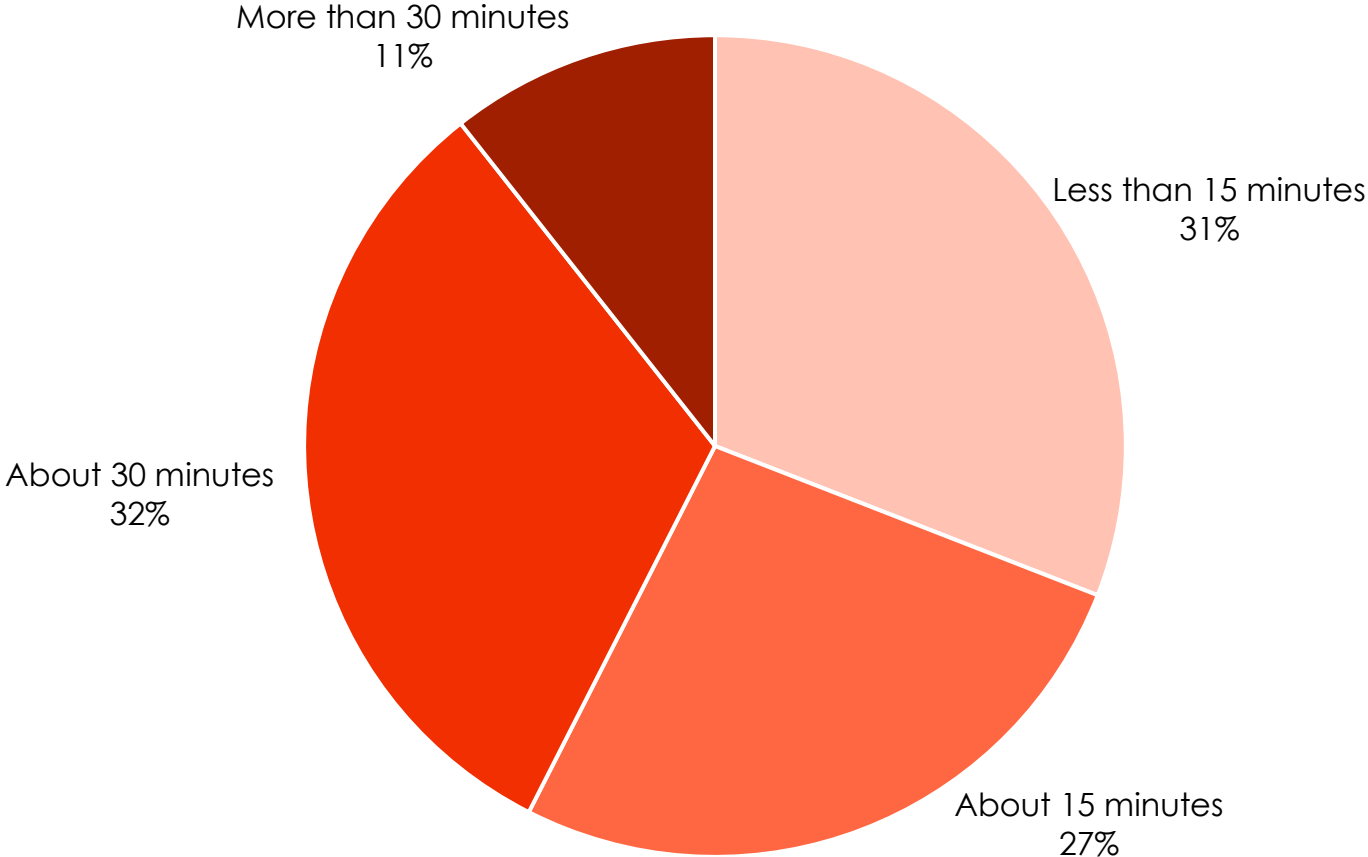
Craft permit holders



Commercial business owners



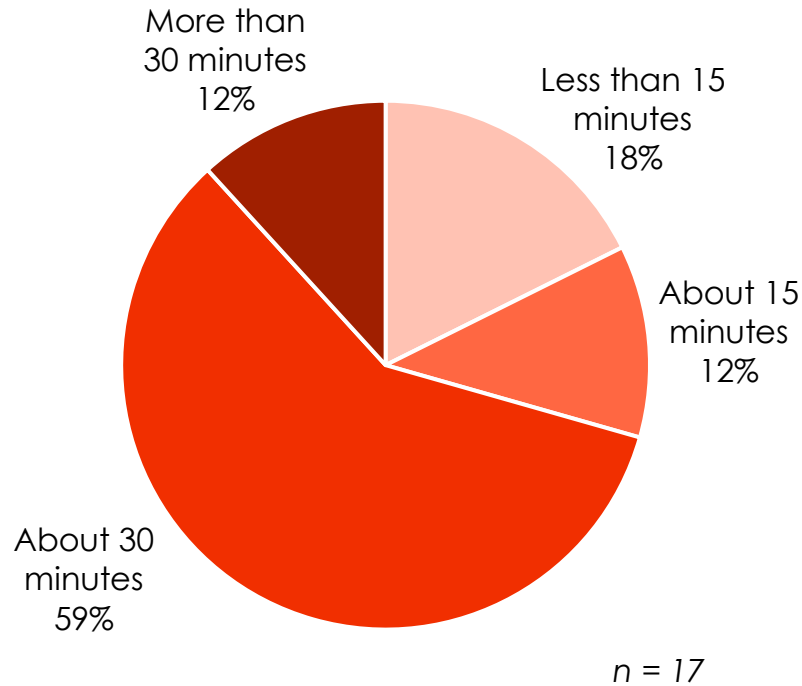
89% of deliveries or load/unload of products on Pike Pl. takes **less than 30 minutes**



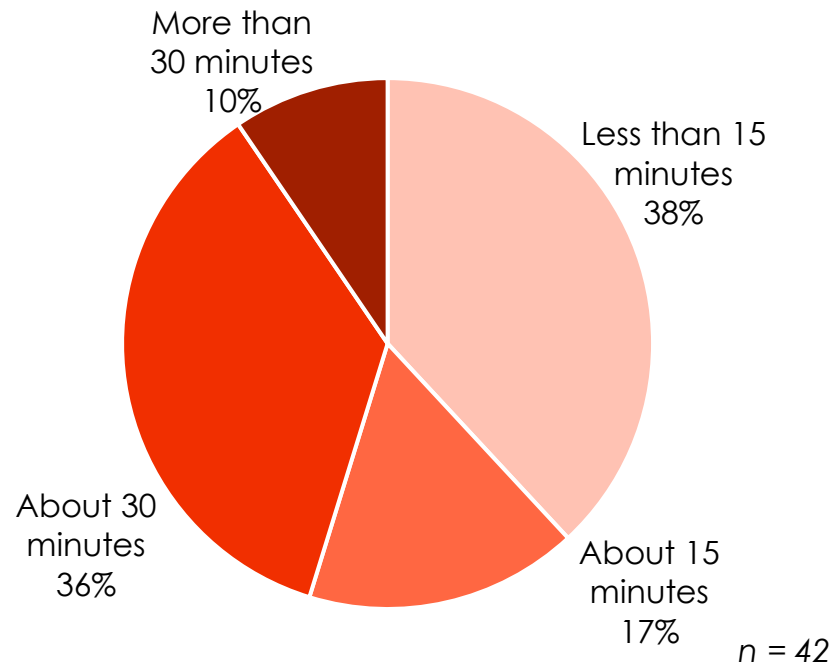
n = 207

71% of farm permit holders take 30 minutes or more for deliveries or load/unload of products, compared to 46% for craft permit holders and 44% for business owners.

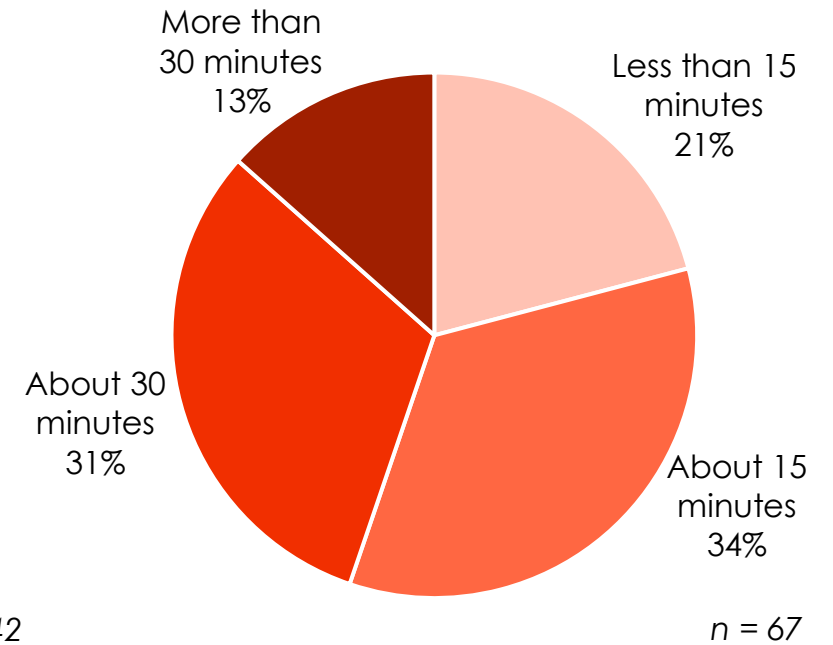
Farm permit holders



Craft permit holders



Commercial business owners



Do you have thoughts on how the street could be managed differently while still meeting the diverse needs of everyone in the Market community?

- Total of **133 comments** recognized a need to **manage the street differently** including:
 - Limiting car traffic to official uses, including deliveries, emergency vehicles, disabled drop off/pick up, and vendors
 - Closing at certain times
 - Closing on certain days
 - Wanting pedestrians
- Total of **38 comments** explicitly expressed a desire to see **no change** with how the street is currently managed.

Official use only (Deliveries, emergency, disabled, vendors)	80
No change	38
Close: Certain times	22
Parking	20
Other suggestions	17
Close: Certain days	16
Ped only	15
Wayfinding	12
N/A	11
Security	9
PDA	6
Unsure	6
Physical condition	4
Seating	4
Total	260

Survey Instrument



Internal Market Community Survey

Welcome! Pike Place Market is in the process of developing a vision for a sustainable future.

As a member of the Pike Place Market community who is here year-round, your experiences and ideas will provide the master planning team with important insights into challenges and opportunities at the Market that we will not hear elsewhere.

Your ideas and responses will be summarized and shared with the Pike Place Market Preservation & Development Authority (PDA) Council to guide the Master Plan. For more information on the Master Plan goals and process, see the website and [FAQ here](#).

Included on this survey are several questions related to Pike Place (the cobblestone street that runs from Pike Street to Virginia) that will help provide the PDA with baseline data and help inform future planning.

This survey should take about 15 minutes to complete. **Please submit your responses by 11:45pm on Tuesday, September 26th (survey deadline has been extended).** Thank you for your participation!

* 1. What is your role in the Pike Place Market community? (check all that apply)

- I live at the Market.
- I work at one of the Market's shops, restaurants, or food stores.
- I work at one of the Market's social service providers (Food Bank, Senior Center, Clinic, Heritage House, Childcare & Preschool) or the Foundation.
- I own a business at the Market and have a commercial lease with the PDA.
- I am a tenant in a non-PDA managed building.
- I work at the Market as a craft or farm agent.
- I hold a craft permit at the Market.
- I hold a farm permit at the Market.
- I hold a busker permit at the Market.
- Other (please specify)

2. What is your home zip code?

3. How much do you agree or disagree with the following statements related to the Market today?

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
The Market's current mix of food, craft, farm, and retail offerings is attractive to local Seattle residents and workers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Market attracts the right balance of locals and tourists.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There are areas of the Market that are under-visited, especially in the off-season.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Market's social impact – including Market social services, support by the Foundation, and affordable housing – are well understood by members of the Market community and the broader public.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The food offerings at the Market are competitive with grocery stores and other local farmer's markets.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Market adequately uplifts merchants from under-represented groups, such as BIPOC, female, LGBTQ, and/or differently-abled entrepreneurs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The Market should become an evening destination.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Market is well-connected – physically and visually – to the waterfront.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Market can help to support the revitalization of Downtown post-COVID with the right partnerships and programming.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Market's regulations – including its charter, leasing processes, and daystall rules – preserve the Market's character without overly hindering the Market's operations and its businesses.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the Market offered more small business support services – such as coaching on online marketing, using point of sale systems another technology, business planning, and succession planning – I would use them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Market provides opportunities for customer interaction and experiential retail (Meet the Producer)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. Please **select up to three statements** you believe should be a focus of the Pike Place Market Master Plan.

- The Market's current mix of food, craft, farm, and retail offerings is attractive to local Seattle residents and workers.
- The Market attracts the right balance of locals and tourists.
- There are areas of the Market that are under-visited, especially in the off-season.
- The Market's social impact – including Market social services, support by the Foundation, and affordable housing – are well understood by members of the Market community and the broader public.
- The food offerings at the Market are competitive with grocery stores and other local farmer's markets.
- The Market adequately uplifts merchants from under-represented groups, such as BIPOC, female, LGBTQ, and/or differently-abled entrepreneurs.
- The Market should become an evening destination.
- The Market is well-connected – physically and visually – to the waterfront.
- The Market can help to support the revitalization of Downtown post-COVID with the right partnerships and programming.
- The Market's regulations – including its charter, leasing processes, and daystall rules – preserve the Market's character without overly hindering the Market's operations and its businesses.
- If the Market offered more small business support services – such as coaching on online marketing, using point of sale systems another technology, business planning, and succession planning – I would use them.
- The Market provides opportunities for customer interaction and experiential retail (Meet the Producer)

The Pike Place Market and You

5. How can Pike Place Market better support you as a business owner, service provider, permit holder, employee, or resident? (open ended)

6. Thinking beyond day-to-day operations, what are the major opportunities for the Market? What are your big ideas for ensuring the Market thrives in the years ahead? (open ended)

7. What does a sustainable, equitable, and authentic Pike Place Market look like to you? What are the challenges to this? (open ended)

Questions 8-12 pertain to Pike Place, the cobblestone street that runs from Pike Street to Virginia Street adjacent to the main arcade of the Market.

8. How do you, your clients, and/or customers use the street Pike Place? Select all that apply.

- I unload products for my business on Pike Pl.
- I receive deliveries on Pike Pl. from a third-party vendor for my business.
- My customers and clients park or utilize loading zones on Pike Pl. to pick up purchases.
- I park on Pike Pl. while attending to business needs.
- Food delivery services (such as Uber Eats or Door Dash) pick up customer orders for delivery in a vehicle.
- Shipping companies (such as Fed Ex and UPS) pick up or make deliveries using Pike Pl.
- My clients, customers, and I don't use Pike Place.
- Other (please specify)

9. When do you access the street Pike Place for delivery, pick up, or other needs? Select all that apply.

- I don't use Pike Pl.
- Before 8am
- 8am to noon
- Noon - 5pm
- After 5pm

10. For those who receive deliveries, load/unload of business products on Pike Pl., on average, how many deliveries do you receive each day?

- 1
- 2
- 3 or more
- I don't use the Pike Pl. for deliveries or load/unload of products

11. On average, how long does a delivery or load/unload of business products take?

- Less than 15 minutes
- About 15 minutes
- About 30 minutes
- More than 30 minutes

12. Do you have thoughts on how the street could be managed differently while still meeting the diverse needs of everyone in the Market community?

Contact in the Future

13. If you are interested in talking more about the questions addressed in this survey, please select the topic(s) you'd like to discuss further.

Master Plan

Pike Pl needs

14. If you are interested in talking more about the questions addressed in this survey, please provide your name and email.

Name

Email



Done