

# 2010 Light Up Night / Holiday Economic Impact Study

Pittsburgh Downtown Partnership  
January 2010

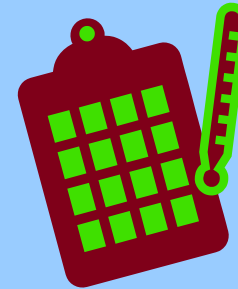
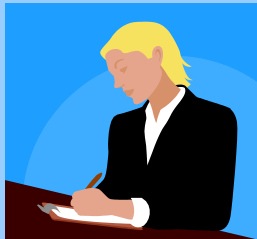
# METHODOLOGY & SAMPLING

## Methodology

Pedestrians at six locations were surveyed: 1) Market Square 2) Macy's 3) PPG 4) 5<sup>th</sup> Ave/Highmark 5) Bridge Party (6<sup>th</sup> St.) 6) One Oxford Center

Due to the timing of the surveying, the majority of respondents were attending Light Up Night events. A small number were Downtown for other reasons.

Study respondents were surveyed on Light Up Night weekend (Fri 11/19, Sat 11/20, and subsequent Saturdays (11/27, 12/4, and 12/11).



## Sampling

Interviewers chose pedestrians at random.

Response Rate: 20% - This means 5 people had to be approached to gain 1 completed survey (4 of 5 said "No").

Time to Complete: Average of 4-5 minutes.

Incentive: No incentive offered.

419 surveys gathered by field interviewers.

# RESPONDENT DEMOGRAPHICS

# DEMOGRAPHICS – ALL RESPONDENTS

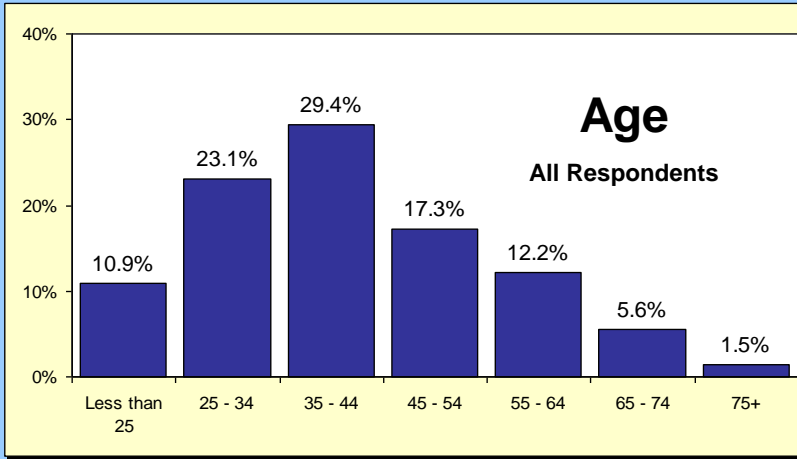
GENDER	n	%
Male	203	49%
Female	212	51%
Total	415	100%
RACE/ETHNICITY	n	%
African American	58	15%
Caucasian	337	83%
Asian	4	1%
Other	5	1%
Total	404	100%

Just 4 respondents classified themselves as Latino and/or Hispanic.

AGE	n	%
Less than 25	45	11%
25 – 34	95	23%
35 – 44	121	29%
45 – 54	71	17%
55 – 64	50	12%
65 – 74	23	6%
75 or More	6	2%
Total	411	100%
INCOME	n	%
Under \$25,000	86	24%
\$25,000 - \$49,999	57	16%
\$50,000 - \$74,999	84	23%
\$75,000 - \$99,999	64	18%
\$100,000 or More	73	20%
Total	364	100%

The respondent base is a representative mix of age groups, income, race, and gender. Similar demographics as the 2007 study.

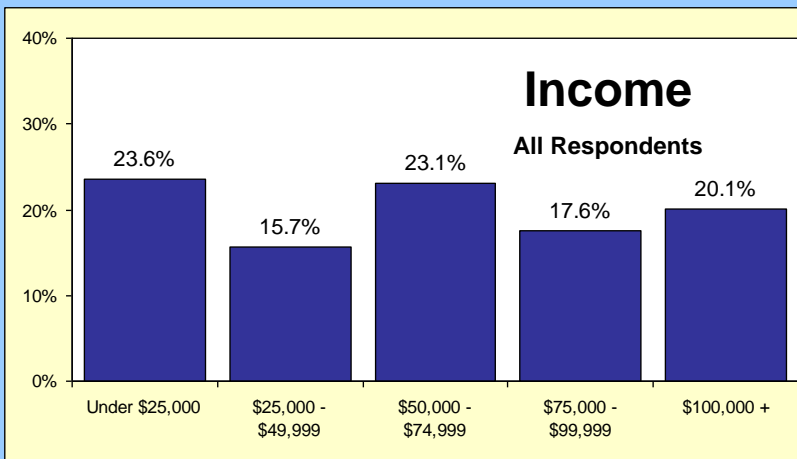
# AGE & INCOME COMPARISONS



	LUN n = 245	Holiday n = 166
Less than 25	9.8	12.7
25 - 34	26.1	18.7
35 - 44	24.9	36.1
45 - 54	16.3	18.7
55 - 64	13.9	9.6
65 - 74	6.9	3.6
75+	2.0	0.6
Total	100.0	100.0

	LUN Friday n = 106	LUN Saturday n = 139
Less than 25	11.3	8.6
25 - 34	29.2	23.7
35 - 44	16.0	31.7
45 - 54	17.9	15.1
55 - 64	17.0	11.5
65 - 74	6.6	7.2
75+	1.9	2.2
Total	100.0	100.0

Friday LUN attendees skewed younger than Sat LUN attendees. Sat LUN heavily attended by those 35-44. Little difference by income.



	LUN n = 214	Holiday n = 150
Under \$25,000	22.0	26.0
\$25,000 - \$49,999	17.3	13.3
\$50,000 - \$74,999	22.9	23.3
\$75,000 - \$99,999	14.5	22.0
\$100,000 +	23.4	15.3
Total	100.0	100.0

	LUN Friday n = 93	LUN Saturday n = 121
Under \$25,000	18.3	24.8
\$25,000 - \$49,999	18.3	16.5
\$50,000 - \$74,999	25.8	20.7
\$75,000 - \$99,999	10.8	17.4
\$100,000 +	26.9	20.7
Total	100.0	100.0

# OCCUPATIONS OF RESPONDENTS

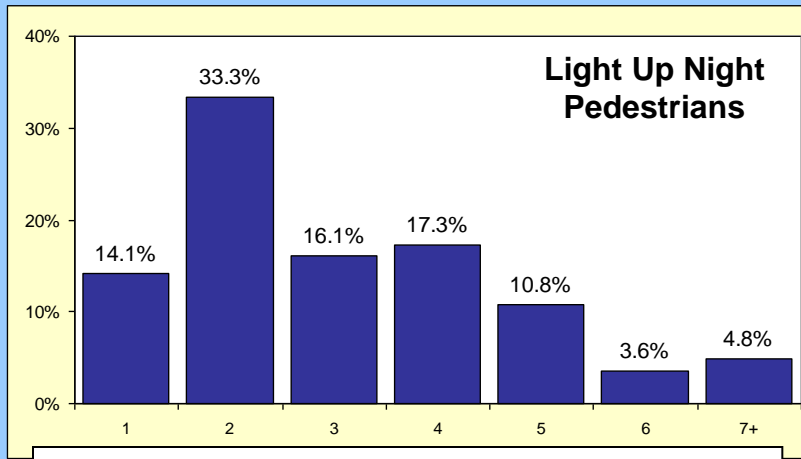
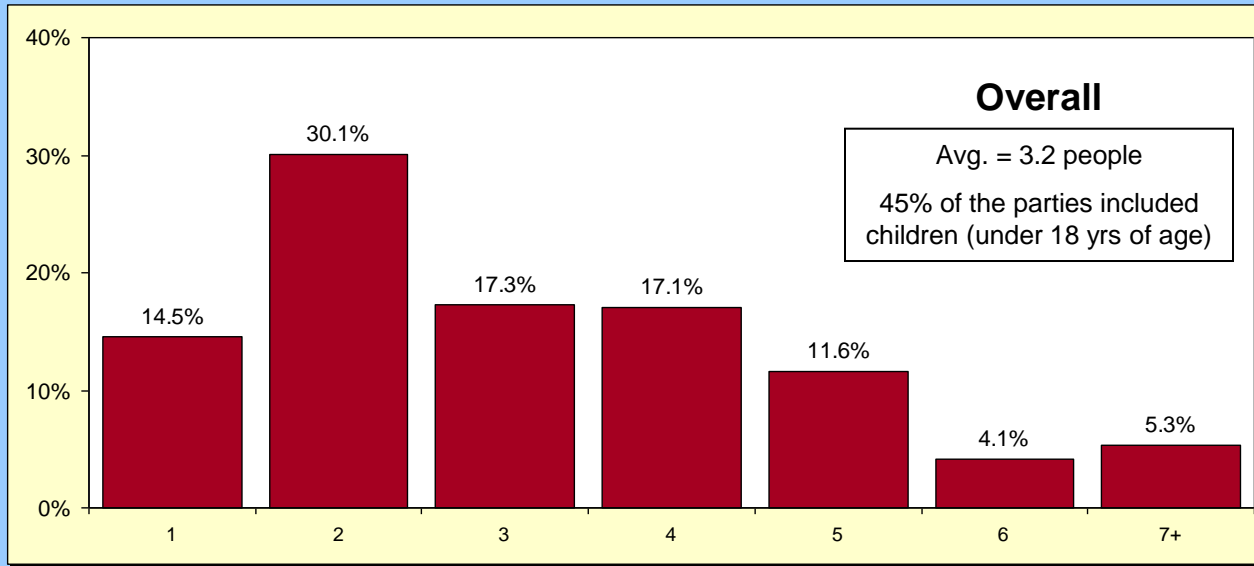
Occupation	N	% of total
Retired	32	7.9%
Student	29	7.2%
Teacher / Education	29	7.2%
Medical / Healthcare	28	6.9%
Sales	23	5.7%
Homemaker	21	5.2%
Unemployed / disabled	18	4.4%
Supervisor / Manager	16	4.0%
Retail	13	3.2%
Customer Service	10	2.5%
Driver	9	2.2%
Computer-Related	8	2.0%
Bank employee	8	2.0%
Secretary/Clerical	7	1.7%
Accountant / Accounting	7	1.7%
Business owner	7	1.7%
Consultant	7	1.7%
Engineer	6	1.5%
Administrator/Coordinator	6	1.5%
Legal	5	1.2%
Social worker	5	1.2%
Construction	5	1.2%

Occupation	N	% of total
Housekeeping/cleaning	5	1.2%
Child care	4	1.0%
Server	4	1.0%
Electrician	4	1.0%
Cashier	4	1.0%
Designer	4	1.0%
Musician	3	0.7%
Human Resources	3	0.7%
Police/Security	3	0.7%
Writer	3	0.7%
Professional	2	0.5%
Hairdresser	2	0.5%
Real estate	2	0.5%
Business analyst	2	0.5%
Office manager	2	0.5%
Office worker	2	0.5%
Pharmacy tech	2	0.5%
Driller	2	0.5%
Librarian	2	0.5%
Other	51	12.6%
Total	405	100.0%

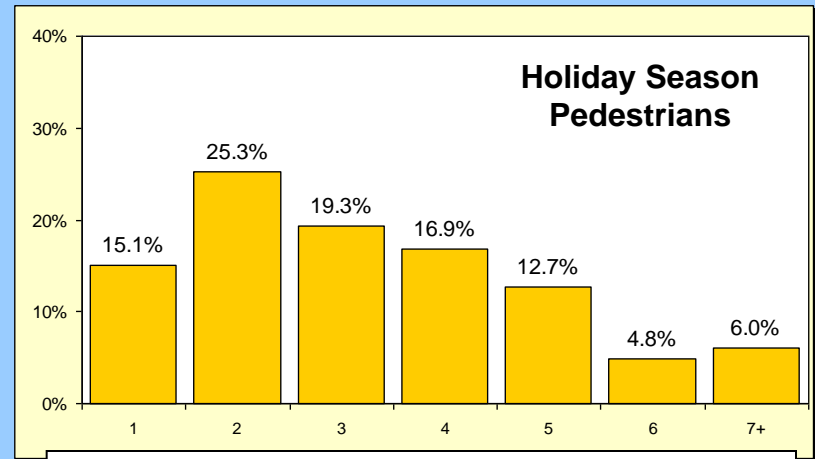
Like the 2007 study, the 2010 LUN attendees and Holiday Pedestrians work in a wide variety of occupations and professions.

What is your occupation? – Q#\_8  
n = 405

# NUMBER OF PEOPLE IN PARTY

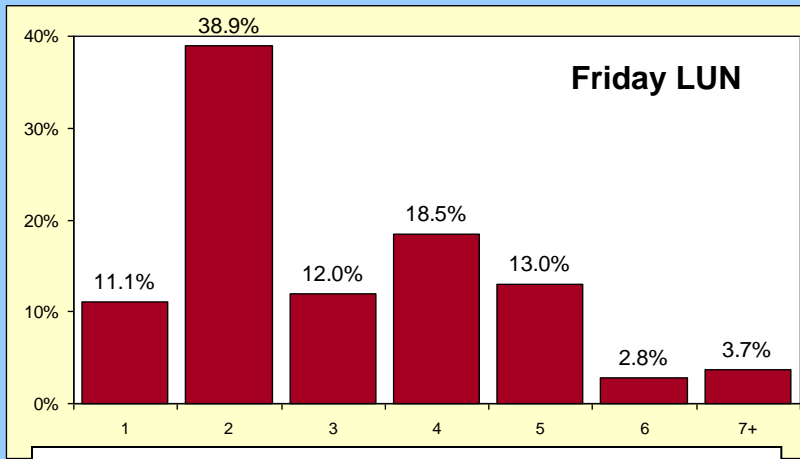
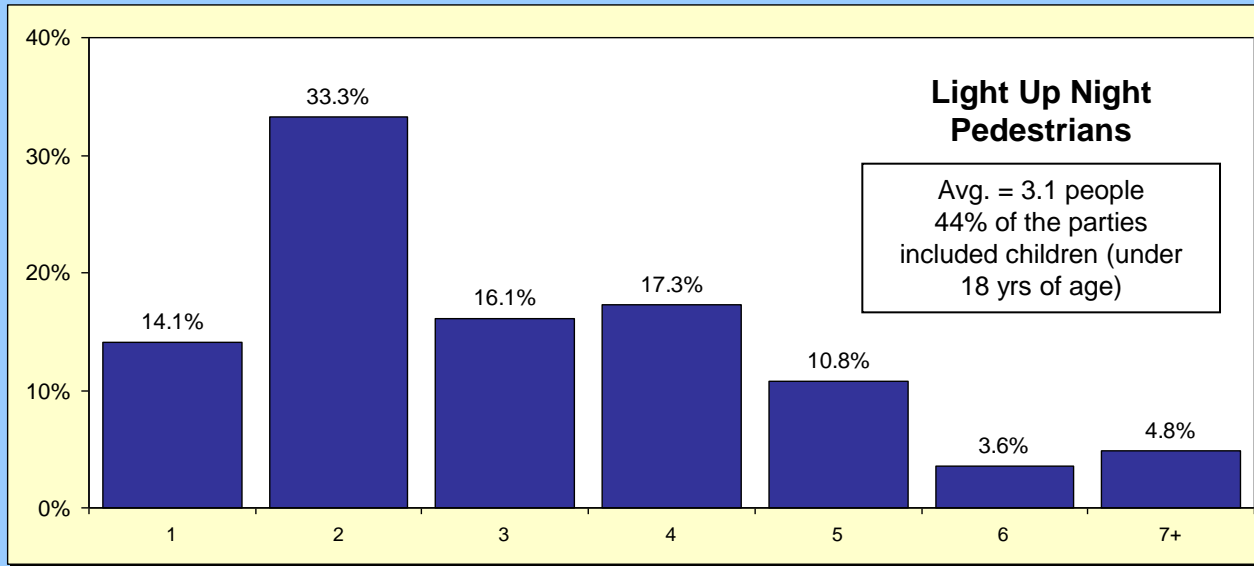


Avg. = 3.1 people  
44% of the parties included children (under 18 yrs of age)

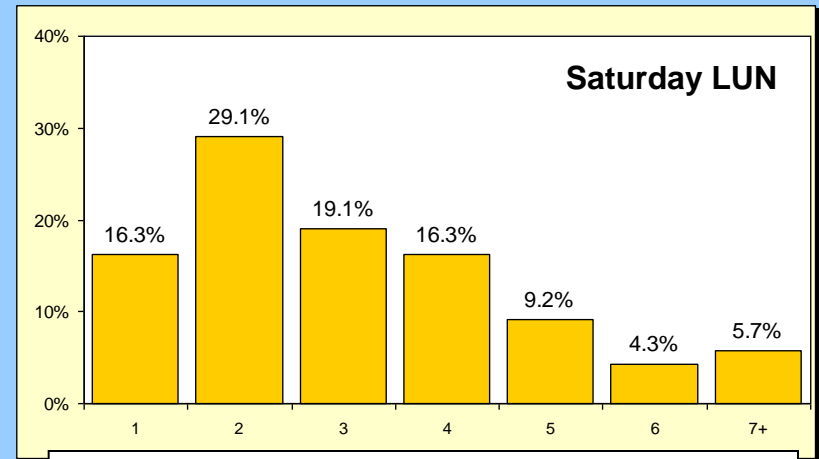


Avg. = 3.3 people  
47% of the parties included children (under 18 yrs of age)

# NUMBER OF PEOPLE IN PARTY



Avg. = 3.1 people  
36% of the parties included children (under 18 yrs of age)



Avg. = 3.1 people  
50% of the parties included children (under 18 yrs of age)



# AVERAGE PARTY SIZE

## By Purpose of Visit

Purpose of Visit	Total # in group	# People < 18 years old
"our annual visit"	9.0	4.0
Parade (WPXI-Macy's)	5.5	3.3
See sights w/ family	4.3	1.9
Ice skate	3.5	1.2
Light Up Night	3.4	1.1
Carriage Rides	3.0	1.0
Shopping	2.8	0.6
Special visit (theater, dining, etc.)	2.5	0.3
Other	2.5	0.7
Resident - live in Downtown	2.0	0.7
Work	1.4	0.1
School	1.4	0.0
Business visit/trip	1.0	0.0

Purpose of Visit	% With Children
Parade (WPXI-Macy's)	100.0%
"our annual visit"	75.0%
See sights w/ family	73.7%
Ice skate	52.9%
Light Up Night	51.8%
Carriage Rides	50.0%
Shopping	34.5%
Special visit (theater, dining, etc.)	8.3%
Work	2.9%
School	0.0%
Business visit/trip	0.0%

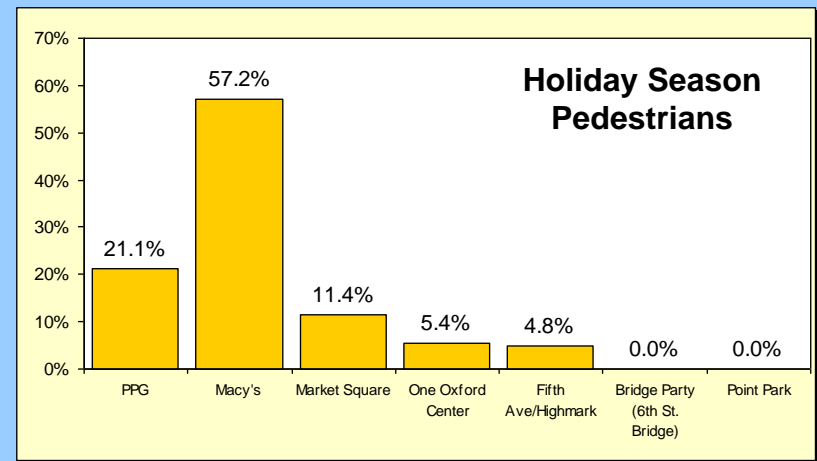
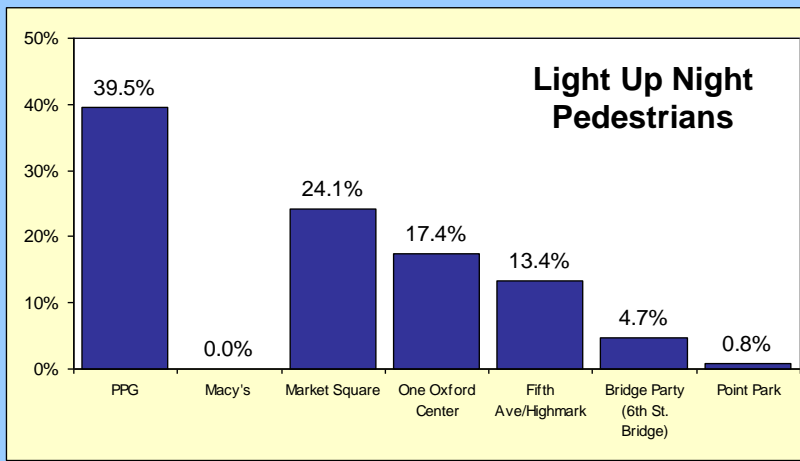
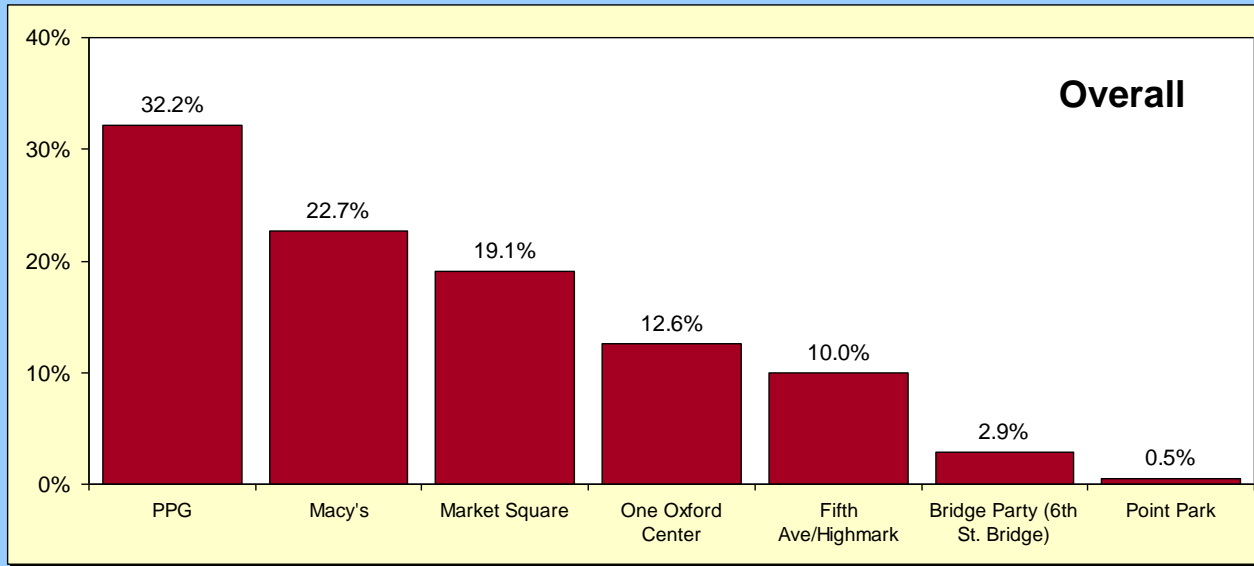
The number of people per pedestrian party or group varies widely by their purpose for visiting Downtown.

As might be expected, those seeking social and entertainment opportunities ("see the sights", WPXI Parade, attend Light Up Night, Ice skate) tend to be in larger groups

Presence of children differs greatly by LUN Fri & Sat: Fri = 40% Sat = 63%

The WPXI Parade was clearly a family event (100% of parties attending had children). Ice skating, Light Up Night, and Carriage Rides were fairly evenly enjoyed; families & adult-only groups.

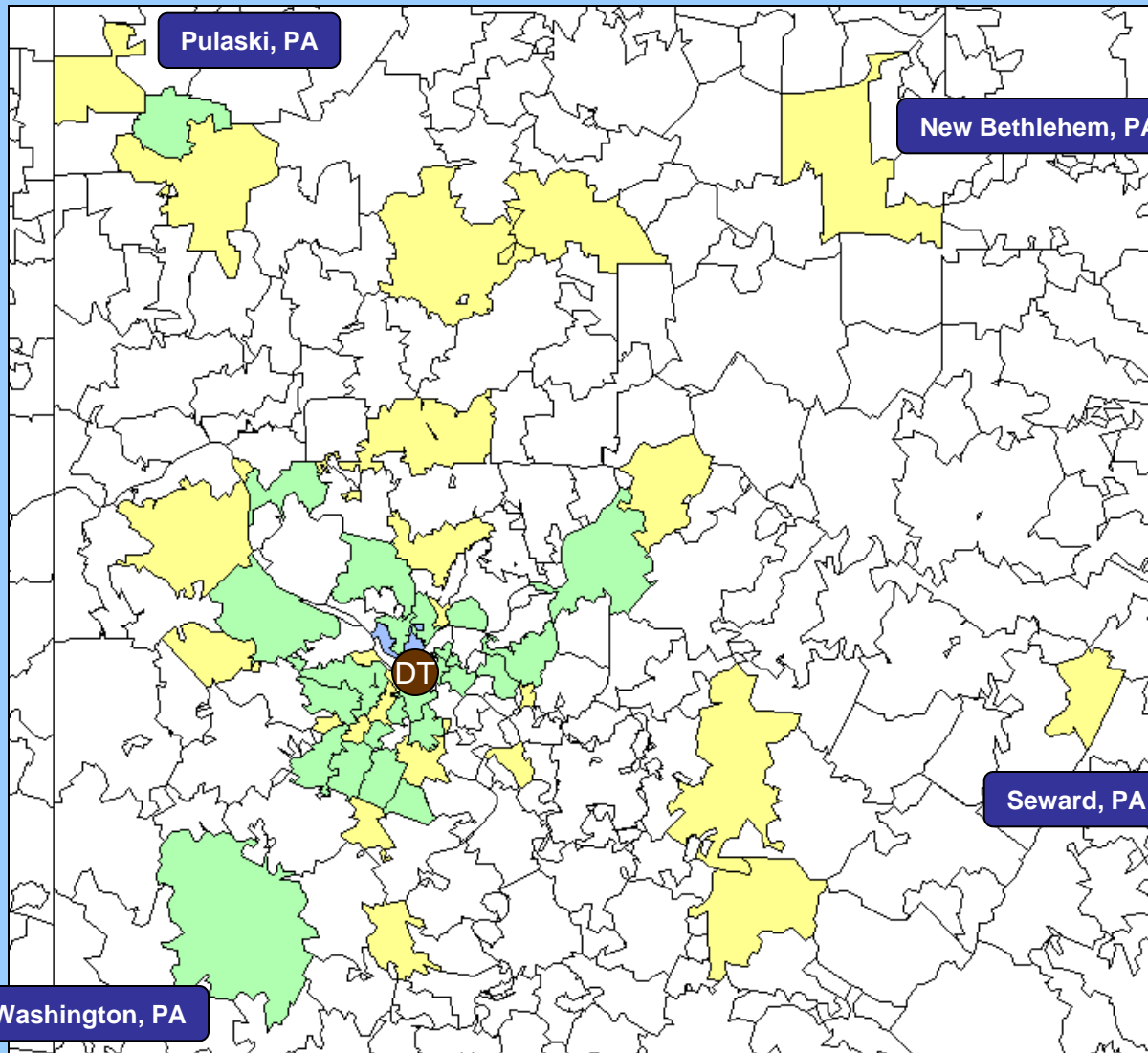
# LOCATION OF SURVEYS



# **ZIP CODE MAPS**

## **(ATTENDEES' RESIDENCE)**




# ZIP CODES OF FRIDAY LUN PEDESTRIANS



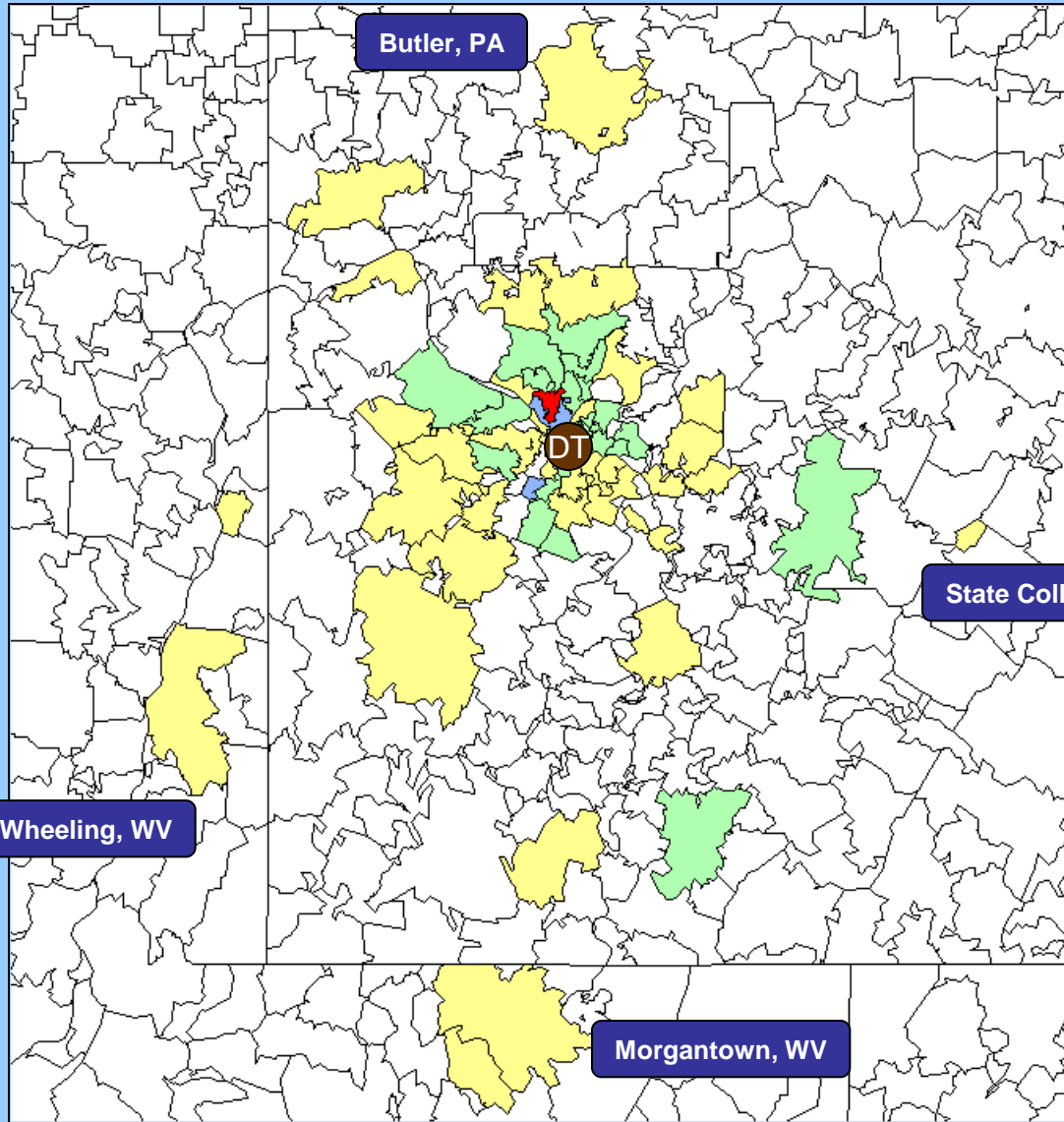
The Pittsburgh zip 15212 accounted for the highest number of Friday LUN pedestrians.

A total of 56 zip codes were represented in the Friday LUN sample.

See table below: Various colors are used to show which zip codes are represented in the research. For example, there are 26 zip codes (green) which account for 2 - 5 people in the Friday LUN sample. "DT" (on map) is placed on the 15222 zip code.

	# of People	Count
	6 to 10	1
	2 to 5	26
	1	29

# ZIP CODES OF SATURDAY LUN PEDESTRIANS



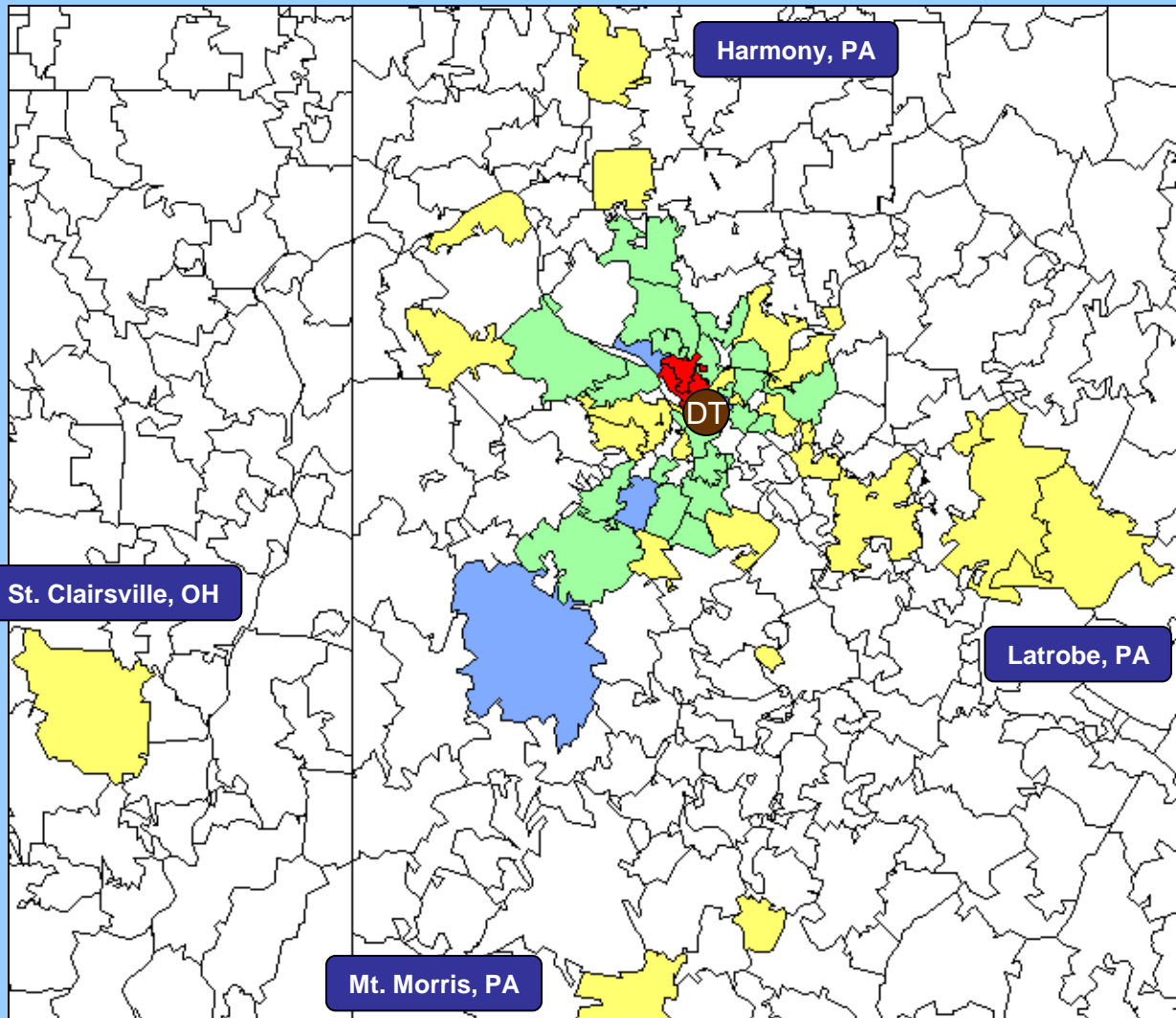
Six people (their zip codes) are not shown on map. One each from Erie, Fairview, Titusville and Port Allegany, PA. Also one from Moosic, PA and Owings Mills, MD.

The Pittsburgh zip 15214 (red) account-ed for the most Sat. LUN pedestrians.

See table below: Various colors are used to show which zip codes are represented in the research. For example, there are 25 zip codes (green) which account for 2 - 5 people in the Saturday sample. "DT" (on map) is placed on the 15222 zip code.

	# of People	Count
<span style="color: red;">■</span>	11 to 50	1
<span style="color: blue;">■</span>	6 to 10	2
<span style="color: green;">■</span>	2 to 5	25
<span style="color: yellow;">■</span>	1	46

# ZIP CODES OF HOLIDAY SHOPPERS



Two Holiday Season shoppers are not shown on map. One from Chicago, IL and one in Kettering, OH.

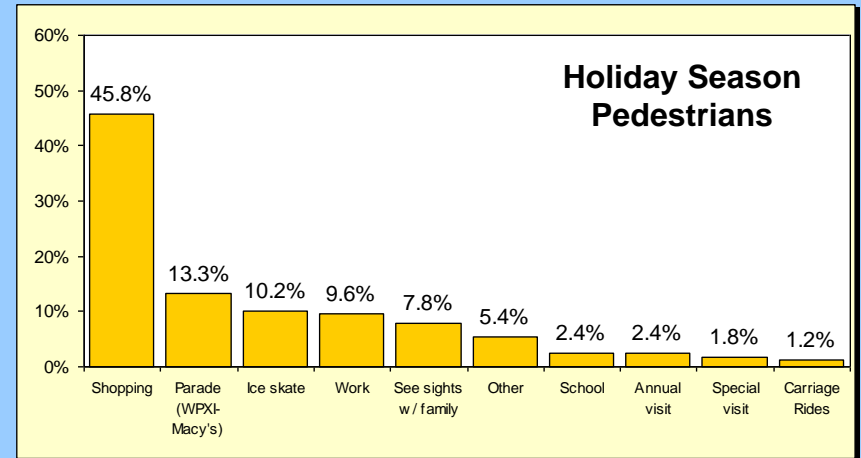
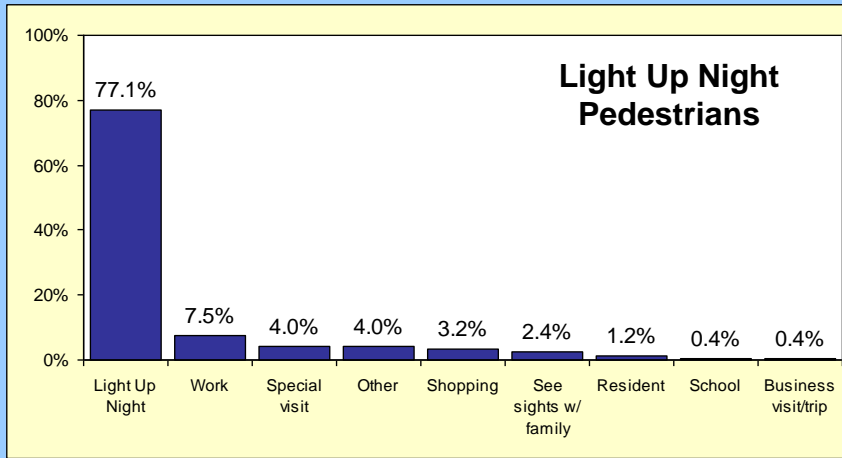
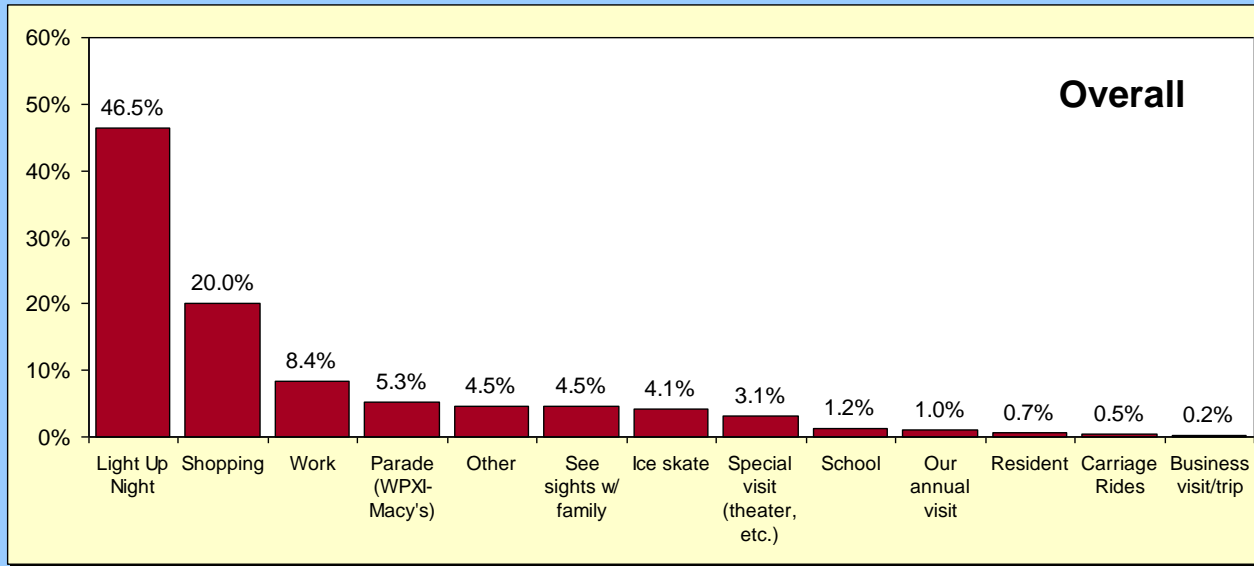
The two zip codes producing the most shoppers, 11 to 50, (shown in red) are Pittsburgh zips 15214 and 15212.

See table below: Various colors are used to show which zip codes are represented in the research. For example, there are 2 zip codes (red) which account for 11-50 people in the Holiday sample. "DT" (on map) is placed on the 15222 zip code.

	# Shoppers	# Zips
	11 to 50	2
	6 to 10	4
	2 to 5	25
	1	29

# **THE LIGHT UP NIGHT / HOLIDAY VISIT TO DOWNTOWN**

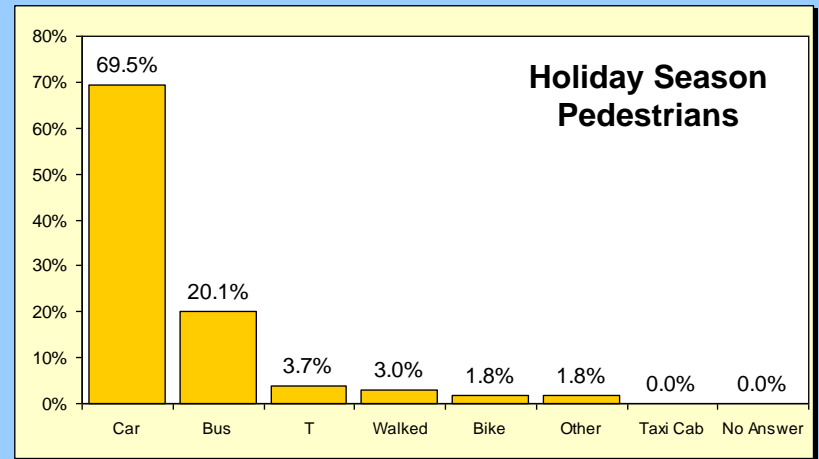
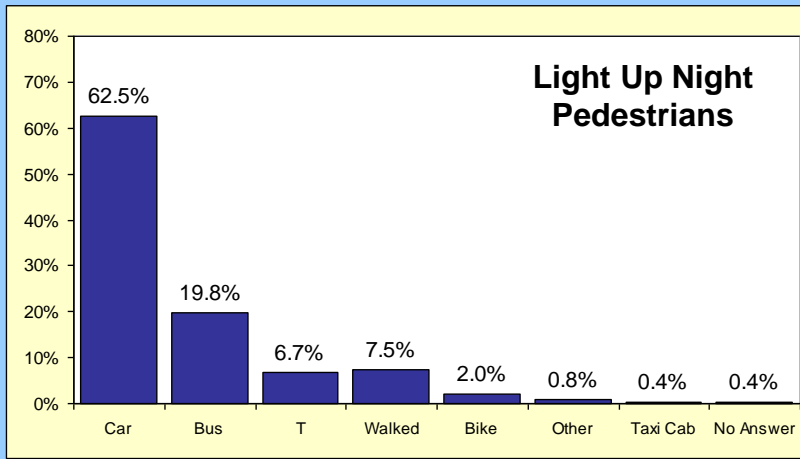
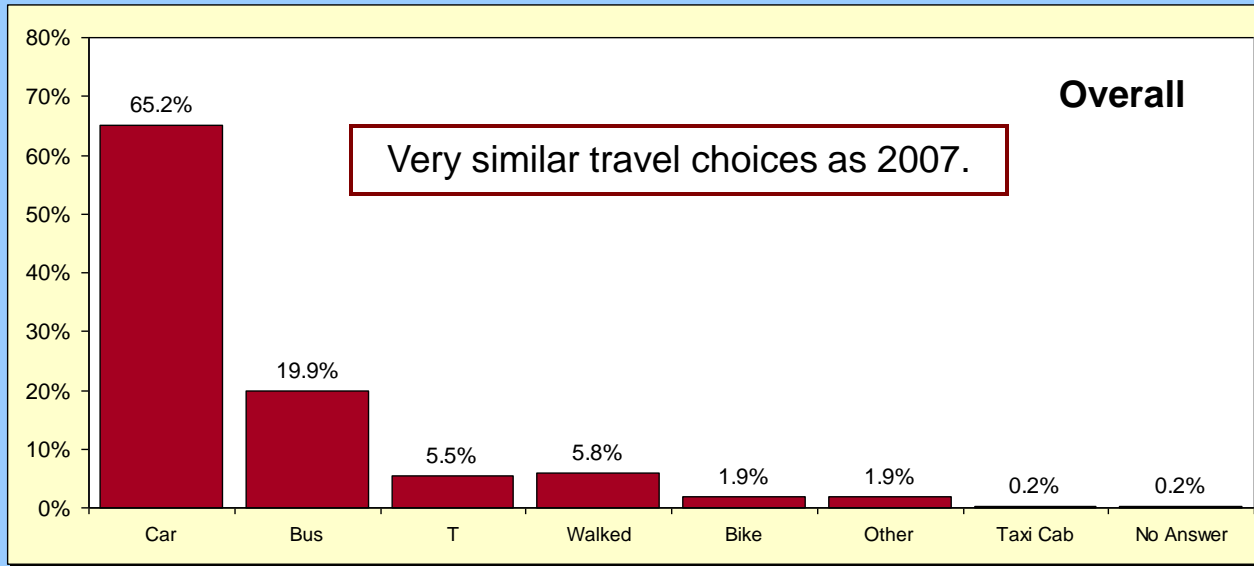
# PRIMARY REASON FOR DOWNTOWN VISIT



Which one of the following best describes your primary reason for being downtown today? – Q#\_1 n = 419

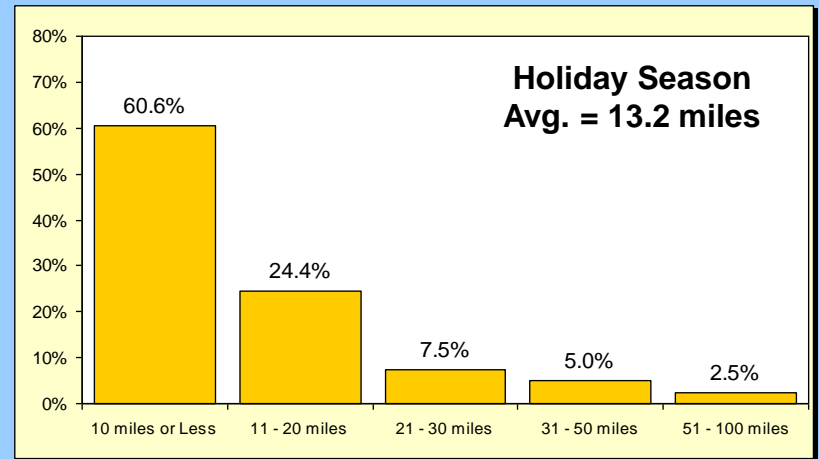
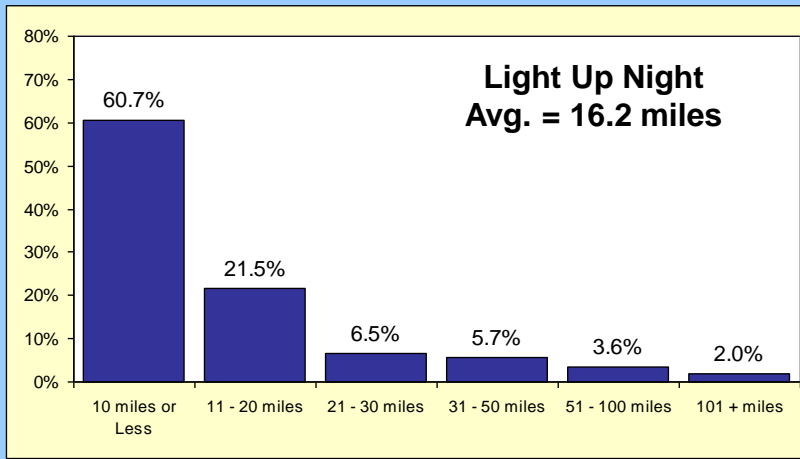
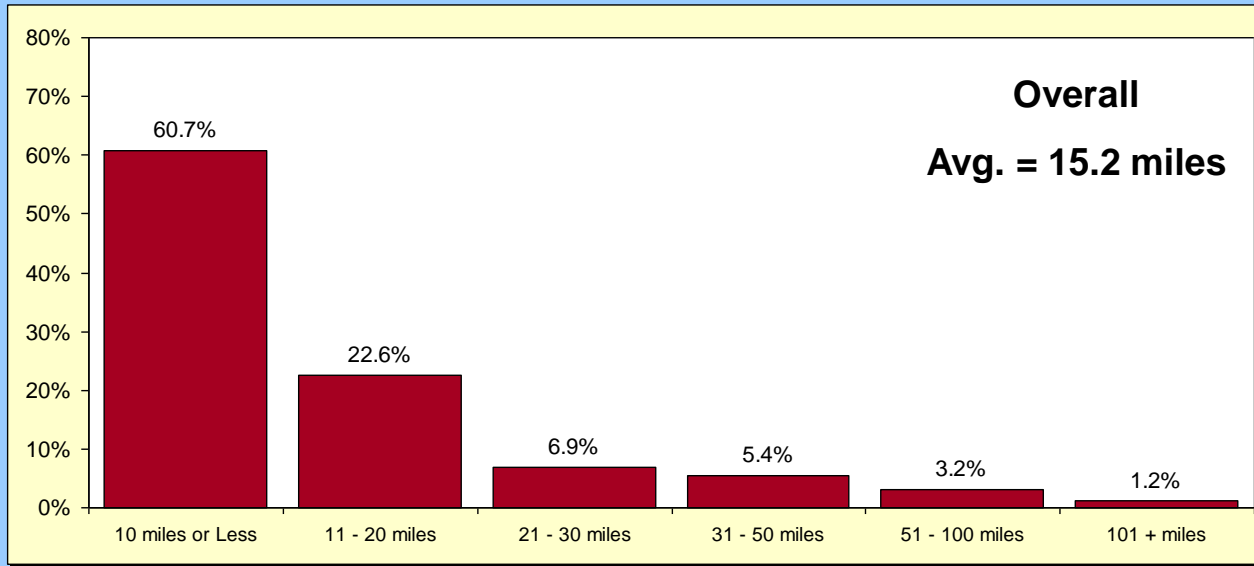


# MODE OF TRAVEL TO DOWNTOWN



How did you travel to Downtown today/tonight? – Q#\_2 n = 417

# DISTANCE TRAVELED



How many miles did you travel today/tonight to come Downtown? – Q#\_2a n = 407

# AVERAGE DISTANCE TRAVELED

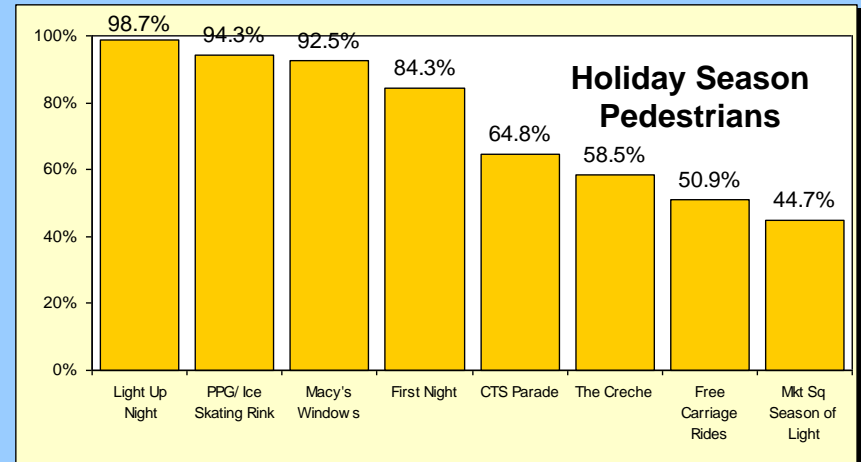
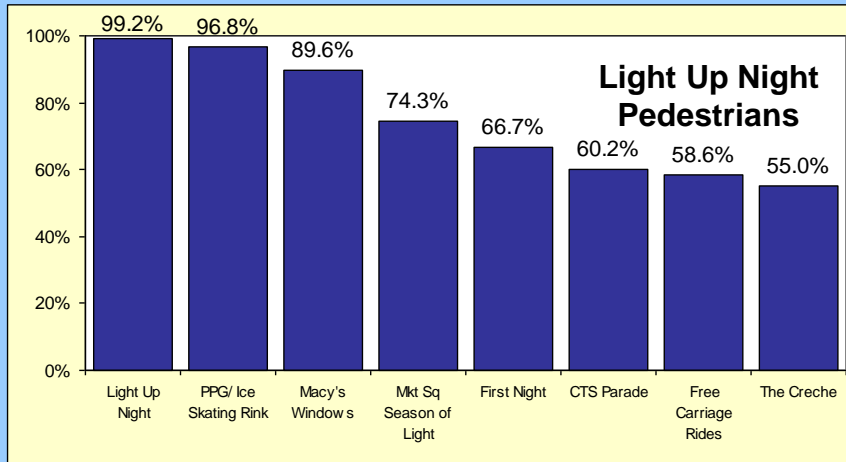
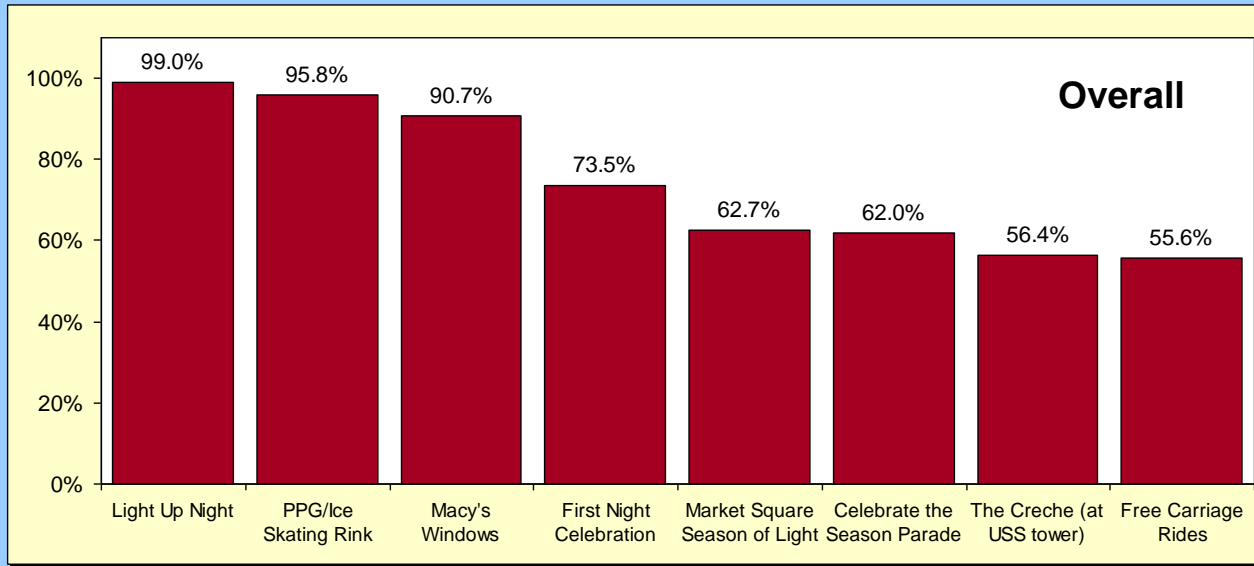
## By Purpose of Visit

Purpose of Visit	Avg # miles
Business visit/trip	200.0
"our annual visit"	35.8
Special visit (theater, dining, etc.)	24.1
See sights w/ family	19.2
Light Up Night	16.3
Other	14.9
Shopping	12.8
Parade (WPXI-Macy's)	11.8
Ice skate	11.5
Work	9.5
Carriage Rides	6.0
School	4.0
Resident - live in Downtown	0.5

How many miles did you travel today/tonight to come Downtown? – Q#\_2a n = 407

# **AWARENESS OF HOLIDAY EVENTS**

# AWARENESS OF HOLIDAY PROGRAMS

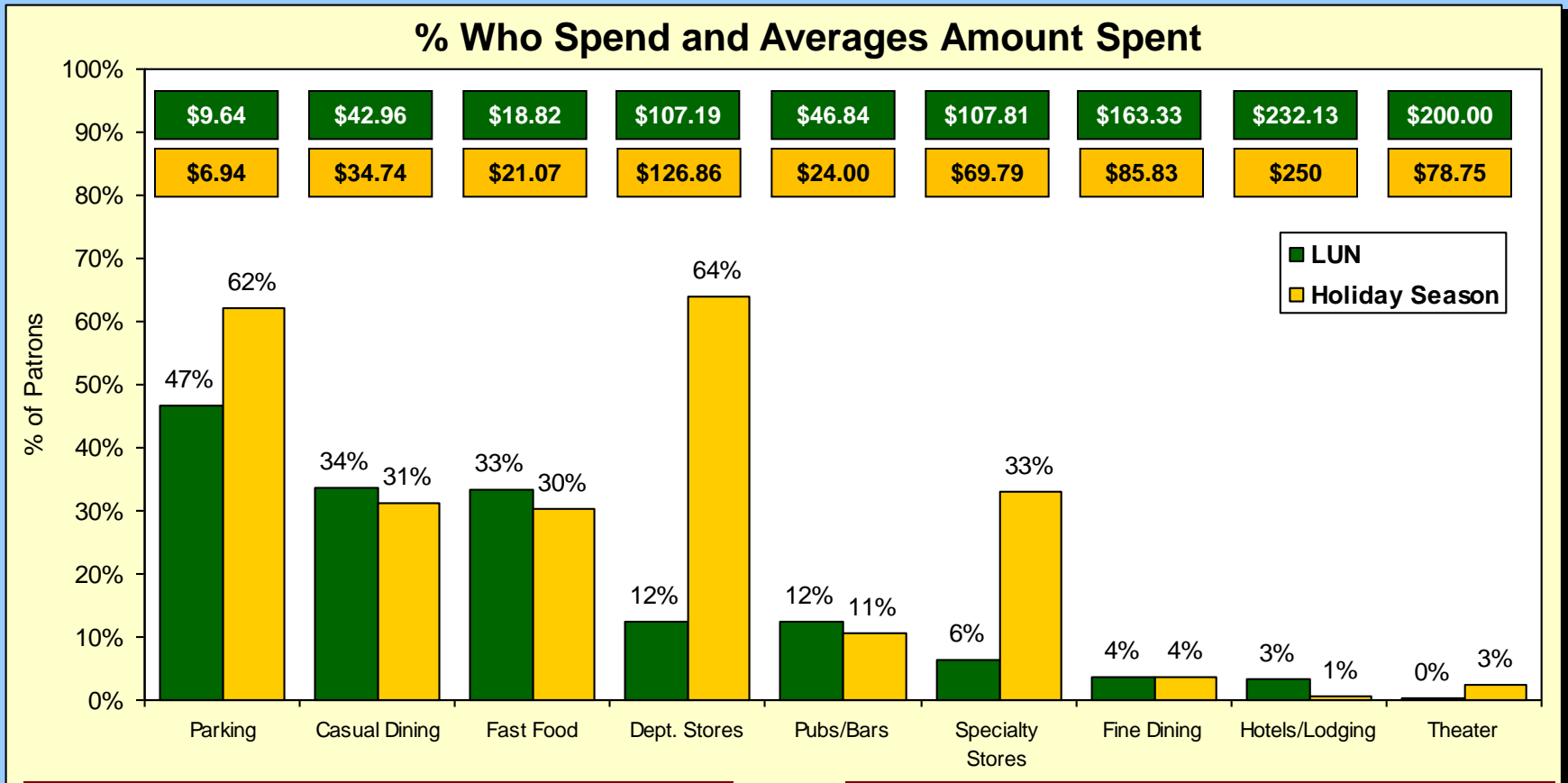


Which of the following are you aware of? – Q#\_3 (Multiple Response Question)

# SPENDING STATISTICS

# 2010 EXPENDITURE COMPARISON

## Light Up Night Pedestrians vs. Holiday Season Pedestrians



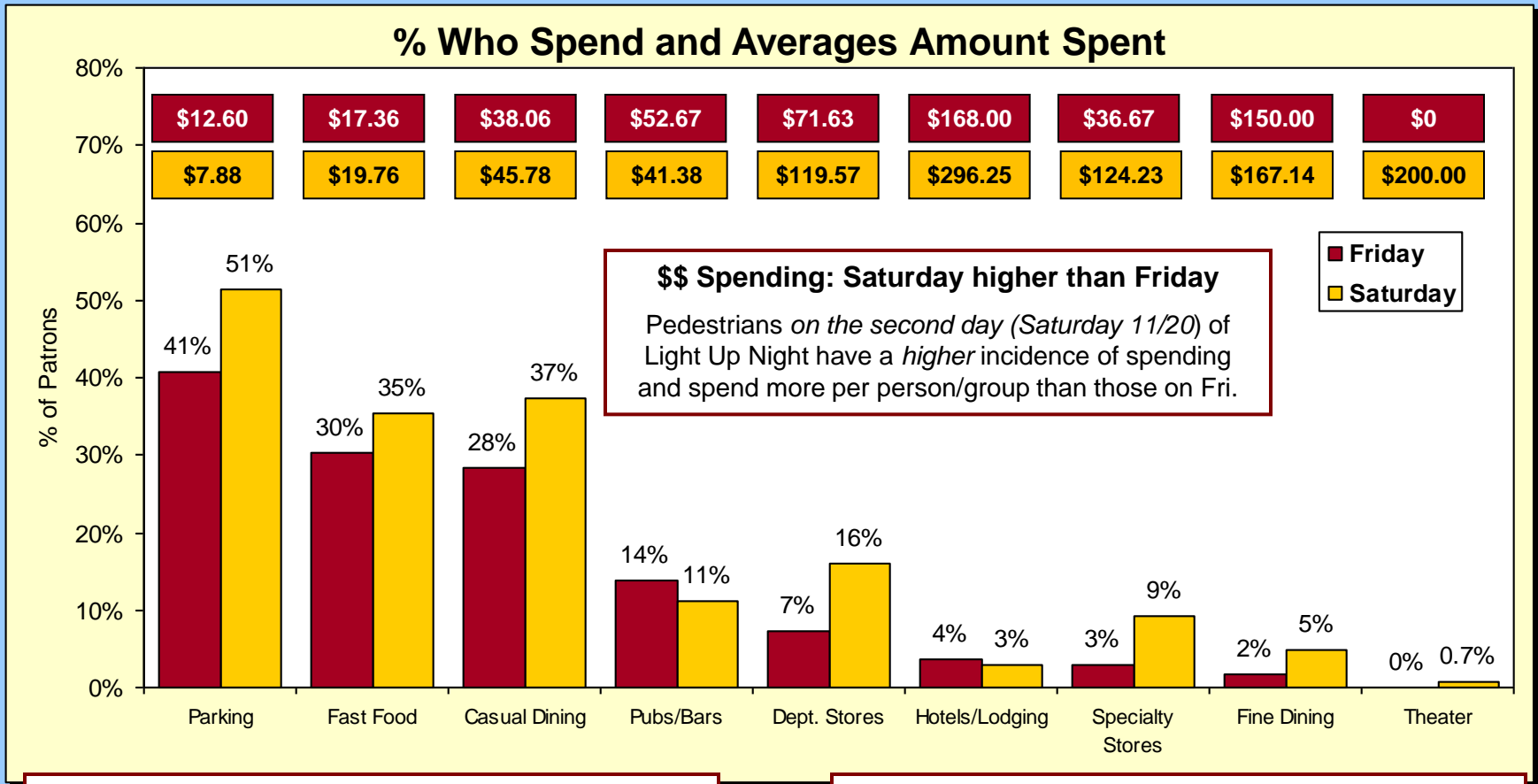
The percentage of those buying/spending at Dept. stores & Specialty stores, on the day of the interview, is higher with Holiday Season pedestrians than LUN pedestrians.

LUN pedestrians spend significantly more than Holiday Season pedestrians in key food/bev categories - Casual & Fine Dining, Bars/Pubs, and Theater.

How much do you expect to spend (or have already spent) this evening Downtown in the following categories? – Q#\_5

# LIGHT UP NIGHT SPENDING COMPARISON

## Friday 11/19 vs. Saturday 11/20



Saturday LUN pedestrians have a higher overall incidence of spending than their Friday LUN counterparts. In only one category, Pubs/bars, was spending incidence higher on 11/19.

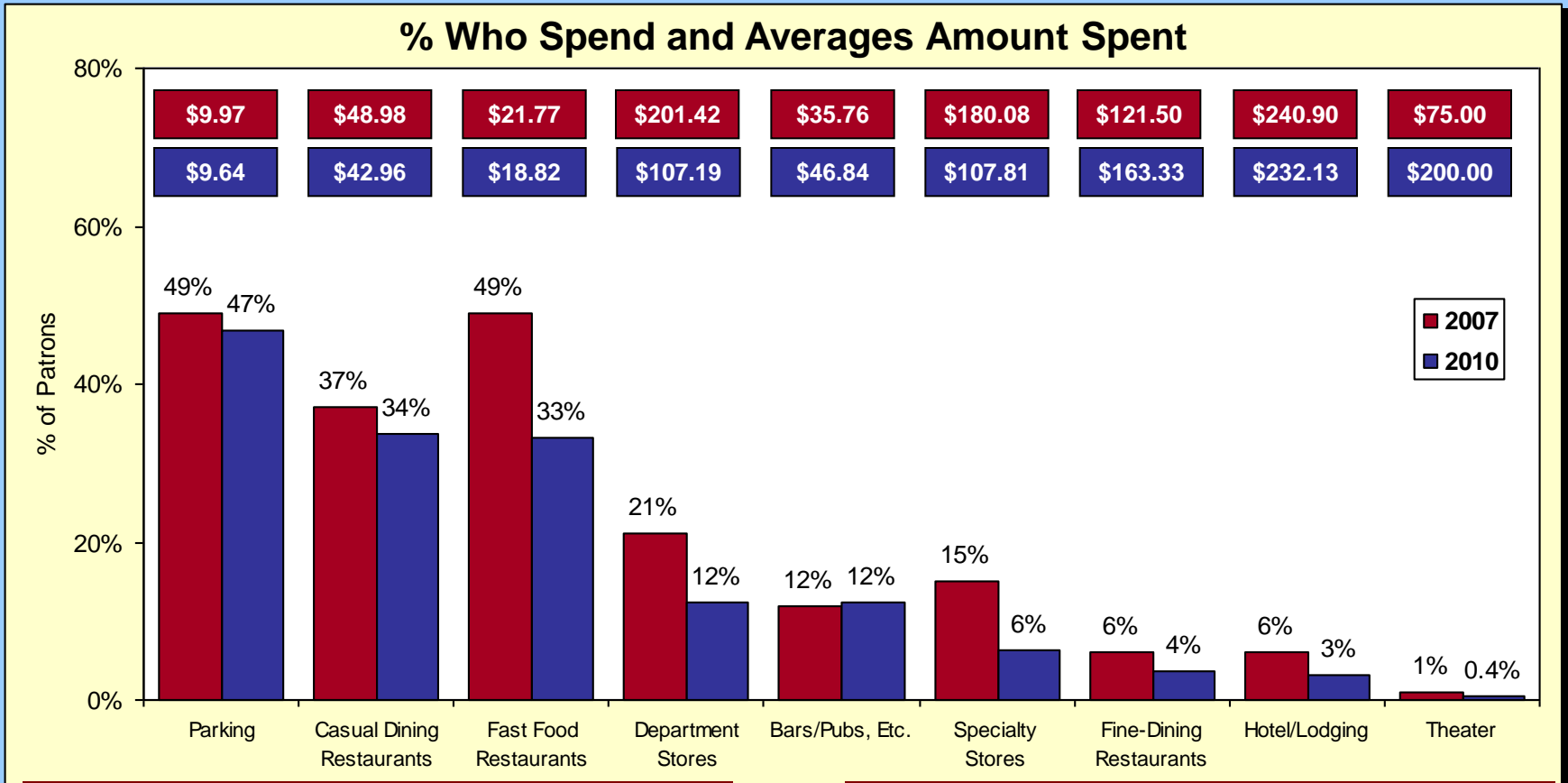
Dept. store spending (per capita average) and Specialty store spending is significantly higher with LUN Saturday attendees; + 70% and + 300% respectively versus Friday averages.

How much do you expect to spend (or have already spent) this evening Downtown in the following categories? – Q#\_5



# LIGHT UP NIGHT PEDESTRIAN SPENDING

## 2007 vs. 2010



The percentage of those buying/spending the day of the interview in 2010 is similar to '07 study in most categories; Dept store, Fast food, Specialty store - lower incidence in '10.

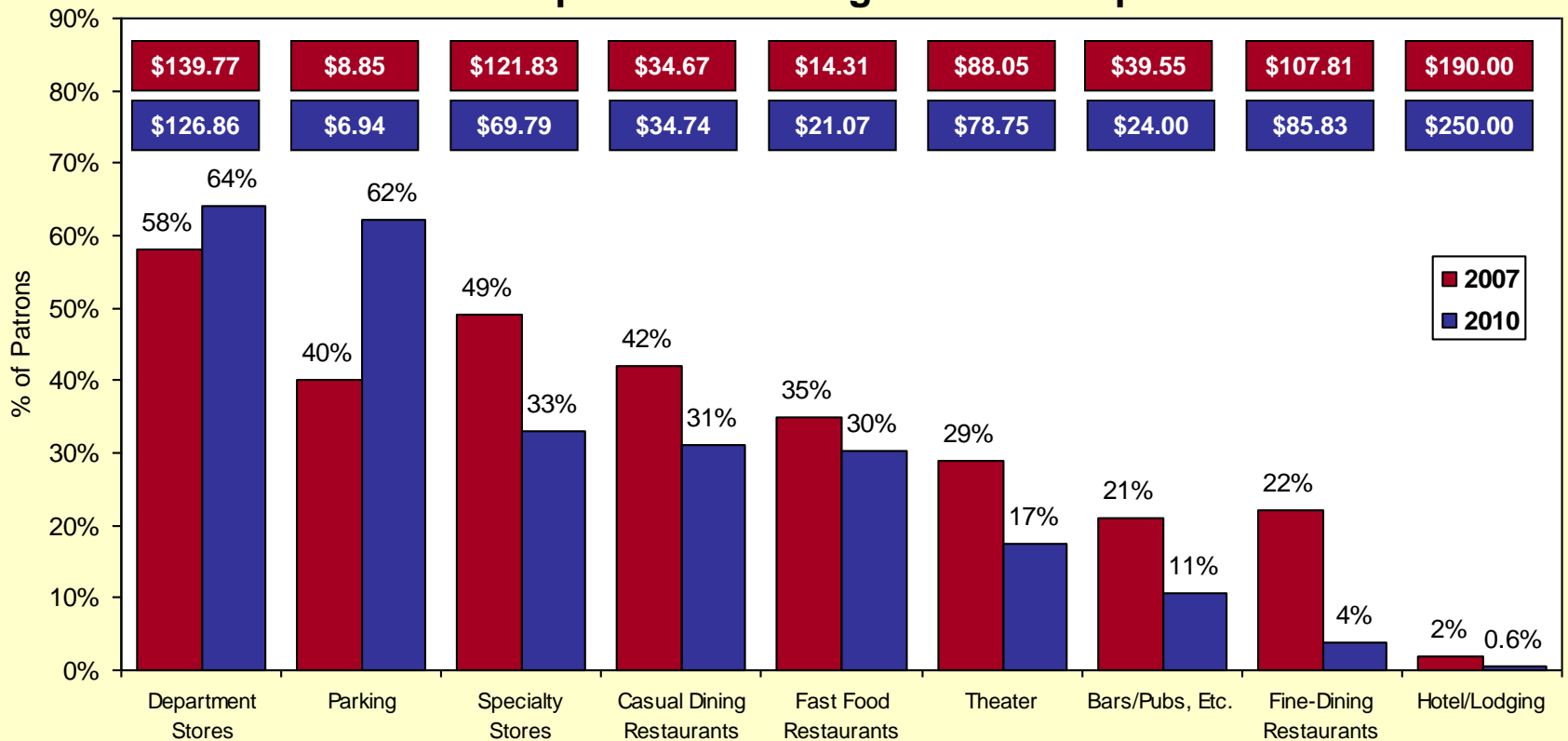
Theater, Bars/Pubs, and Fine Dining spending is substantially higher in 2010. Perhaps a reflection of the economy, spending at Dept. & Specialty stores is lower.

How much do you expect to spend (or have already spent) this evening Downtown in the following categories? – Q#\_5 n = 253

# HOLIDAY PEDESTRIAN SPENDING

## 2007 vs. 2010

**% Who Spend and Averages Amount Spent**



The percentage of those buying/spending the day of the interview in 2010 is generally lower than '07 study categories; Dept. store, Parking - higher incidence in 2010.

Casual Dining and Fast food spending is slightly higher in 2010. Perhaps a reflection of the economy, spending in other categories is flat or lower versus '07 findings.

How much do you expect to spend (or have already spent) this afternoon/evening Downtown in the following categories? – Q#\_5 n = 161

# ECONOMIC IMPACT CALCULATIONS

# LIGHT UP NIGHT – ECONOMIC VALUE

## Friday Light Up Night

Establishment	Incidence	Avg. Spent	Weighted Per Group Avg.
Department Store	7%	\$71.63	\$5.01
Specialty Store	3%	\$36.67	\$1.10
Fast Food	30%	\$17.36	\$5.21
Casual Dining	28%	\$38.06	\$10.66
Fine Dining	2%	\$150.00	\$3.00
Bars/Pubs	14%	\$52.67	\$7.37
Theater	0%	\$0.00	\$0.00
Parking	41%	\$12.60	\$5.17
Hotel	4%	\$168.00	\$6.72
Friday LUN Value			\$44.24

## Saturday Light Up Night

Establishment	Incidence	Avg. Spent	Weighted Per Group Avg.
Department Store	16%	\$119.57	\$19.13
Specialty Store	9%	\$124.23	\$11.18
Fast Food	35%	\$19.76	\$6.92
Casual Dining	37%	\$45.78	\$16.94
Fine Dining	5%	\$167.14	\$8.36
Bars/Pubs	11%	\$41.38	\$4.55
Theater	1%	\$200.00	\$1.40
Parking	51%	\$7.88	\$4.02
Hotel	3%	\$296.25	\$8.89
Saturday LUN Value			\$81.38

## Friday Light Up Night

Estimated Attendees	Estimated Groups	Per Group Value	Total Estimated Economic Value
350,000 attendees	112,903	\$44.24	\$4,994,839
400,000 attendees	129,032	\$44.24	\$5,708,387
450,000 attendees	145,161	\$44.24	\$6,421,935

Most Likely Scenario

## Saturday Light Up Night

Estimated Attendees	Estimated Groups	Per Group Value	Total Estimated Economic Value
100,000 attendees	32,258	\$81.38	\$2,625,161
150,000 attendees	48,387	\$81.38	\$3,937,742
200,000 attendees	64,516	\$81.38	\$5,250,323

Most Likely Scenario

Assuming the most likely LUN attendance/participation levels for Fri 11/19/10 & Sat 11/20/10, the estimated economic impact to the Downtown economy for the entire LUN weekend is \$10.959 Million.

# HOLIDAY SEASON – ECONOMIC VALUE

## Holiday Season Pedestrians

Establishment	Incidence	Avg. Spent	Weighted Per Group Avg.
Department Store	64%	\$126.86	\$81.19
Specialty Store	33%	\$69.79	\$23.03
Fast Food	30%	\$21.07	\$6.32
Casual Dining	31%	\$34.74	\$10.77
Fine Dining	4%	\$85.83	\$3.43
Bars/Pubs	11%	\$24.00	\$2.64
Theater	3%	\$78.75	\$2.36
Parking	62%	\$6.94	\$4.30
Hotel	1%	\$250.00	\$2.50
Holiday Season Value			\$136.55

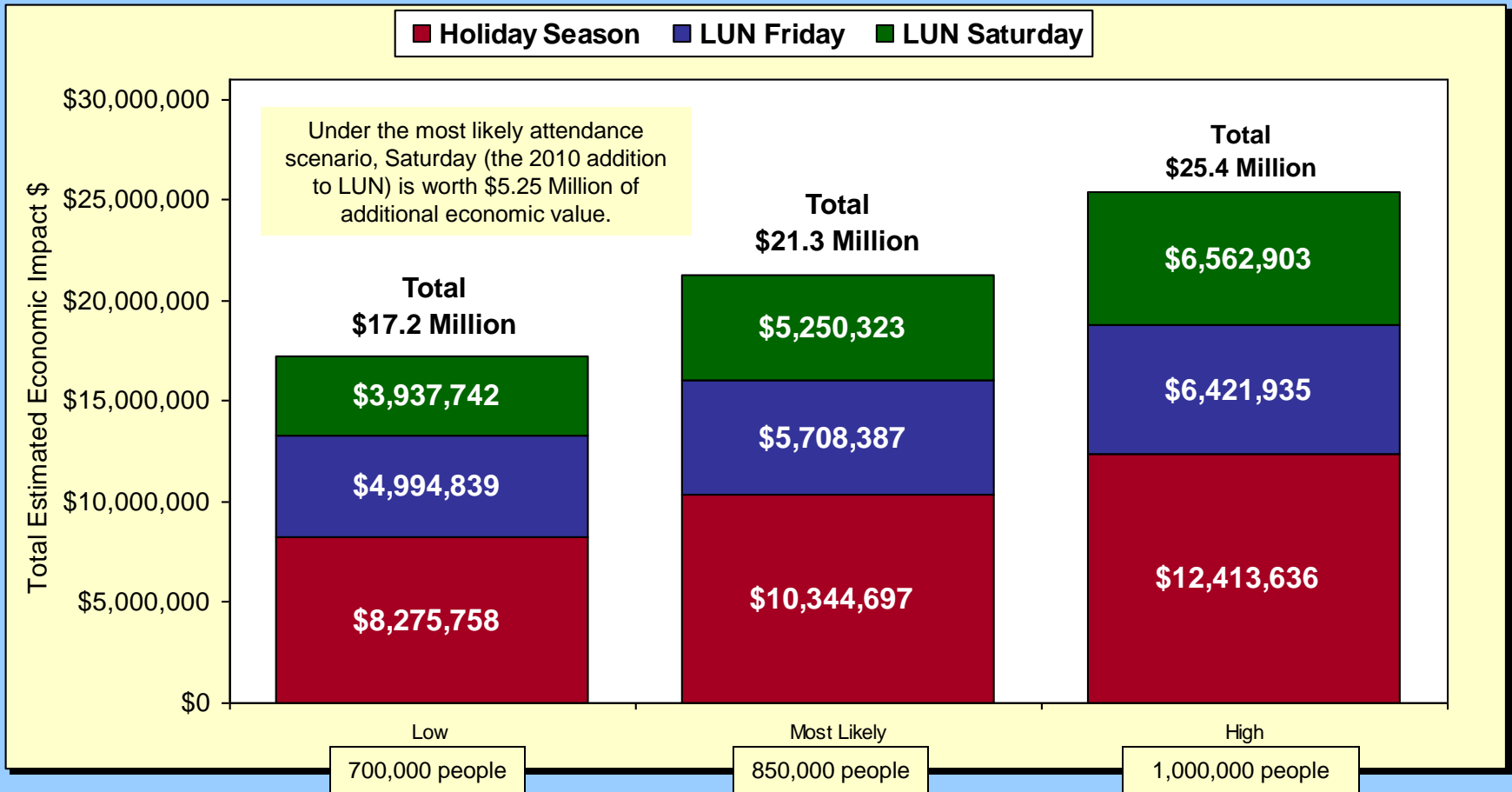
## Holiday Season Pedestrians

Estimated Attendees	Estimated Groups	Per Group Value	Total Estimated Economic Value
200,000 attendees	60,606	\$136.55	\$8,275,758
250,000 attendees	75,758	\$136.55	\$10,344,697
300,000 attendees	90,909	\$136.55	\$12,413,636

Most Likely Scenario

Assuming the most likely Holiday Season attendance/shopping levels (5 Saturdays), the estimated economic impact to the Downtown economy for the entire Holiday Season is \$10.344 Million.

# SUMMARY OF ECONOMIC IMPACT



**Assuming the most likely attendance/shopping levels (3 events), the estimated economic impact to the Downtown economy for 2010 is \$21.3 Million. In 2007 the estimated economic impact was \$12 million.**

# Appendix Section

# FREQUENCY OF PATRONAGE

DEPARTMENT STORES	LUN Weekend	Holiday Season
Daily	1.6	2.4
Few times a week	5.6	4.3
Once a week	10.7	1.8
Few times in 6 weeks	21.4	17.7
Once in 6 weeks	32.5	28.0
Never	28.2	45.7

SPECIALTY STORES	LUN Weekend	Holiday Season
Daily	1.6	0.6
Few times a week	4.0	1.8
Once a week	6.3	1.2
Few times in 6 weeks	11.5	14.6
Once in 6 weeks	28.6	17.7
Never	48.0	64.0

PUBS/BARS	LUN Weekend	Holiday Season
Daily	1.6	0.0
Few times a week	3.6	1.8
Once a week	7.9	1.8
Few times in 6 weeks	12.3	6.1
Once in 6 weeks	15.1	7.9
Never	59.5	82.3

FAST FOOD	LUN Weekend	Holiday Season
Daily	2.4	1.2
Few times a week	7.1	2.4
Once a week	5.6	3.0
Few times in 6 weeks	13.9	7.3
Once in 6 weeks	15.1	11.0
Never	56.0	75.0

CASUAL DINING	LUN Weekend	Holiday Season
Daily	0.8	0.6
Few times a week	8.3	1.8
Once a week	12.7	3.0
Few times in 6 weeks	21.4	14.0
Once in 6 weeks	21.4	12.8
Never	35.3	67.7

FINE DINING	LUN Weekend	Holiday Season
Daily	0.8	0.0
Few times a week	1.6	0.6
Once a week	3.6	1.2
Few times in 6 weeks	11.5	7.3
Once in 6 weeks	27.0	12.8
Never	55.6	78.0

PARKING	LUN Weekend	Holiday Season
Daily	5.2	0.6
Few times a week	2.8	0.0
Once a week	4.0	1.2
Few times in 6 weeks	19.4	15.9
Once in 6 weeks	21.0	25.0
Never	47.6	57.3

HOTELS/LODGING	LUN Weekend	Holiday Season
Daily	0.0	0.0
Few times a week	0.0	0.0
Once a week	1.2	0.0
Few times in 6 weeks	0.0	1.2
Once in 6 weeks	4.8	1.8
Never	94.0	97.0

THEATER	LUN Weekend	Holiday Season
Daily	0.8	0.0
Few times a week	0.8	0.0
Once a week	4.4	0.0
Few times in 6 weeks	10.7	9.1
Once in 6 weeks	28.6	13.4
Never	54.8	77.4

How often do you expect to (or have already) patronize the following in Downtown over the six-week holiday shopping season? – Q#\_4  
n = 416