# Downtown Pittsburgh IDA Member Image Study

Wave I Summary

July 2007

METHODOLOGY

- Online survey sent via e-mail to approximately 1,200 IDA members on in June, 2007.

- Brief questionnaire solicited perception of Downtown Pittsburgh on an overall basis as well as on 18 specific attributes.

- A total of 139 respondents completed the questionnaire.

RESPONDENT PROFESSIONAL POSITION
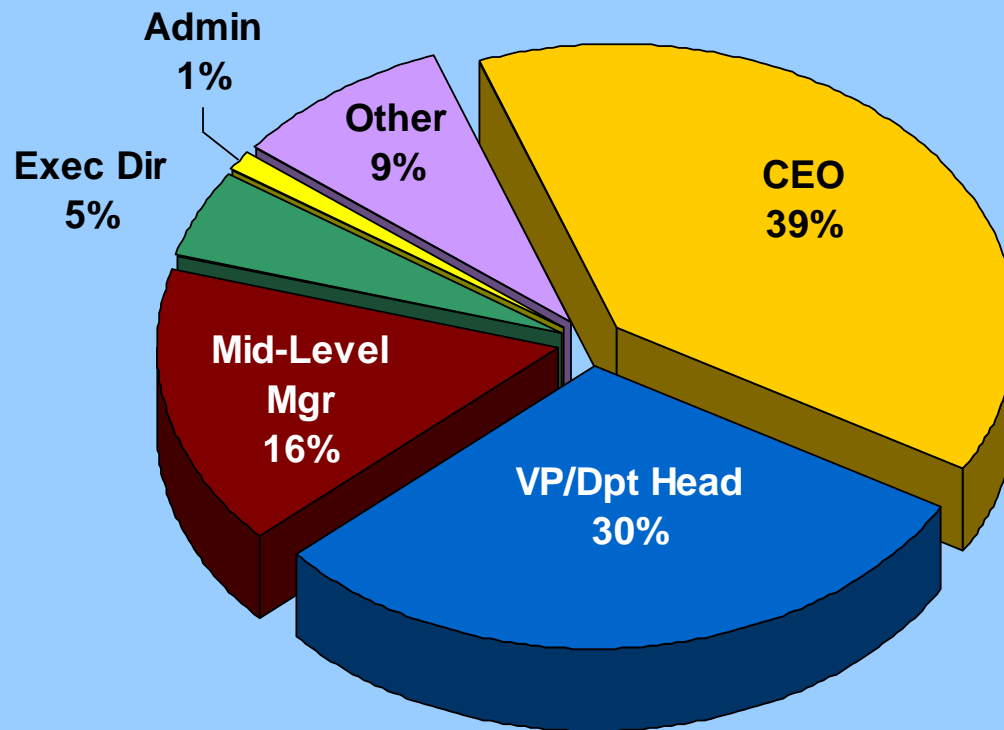
The vast majority of survey respondents have high-level positions in their respective downtown organizations.

KEY FINDINGS

- Overall Perception of Pittsburgh is good.
  - On a 1-9 scale of appeal, 51% gave a score of 7-9 and 73% gave a score of 6-9. The mean was 6.1.

- Pittsburgh is associated with being a "Sports Center" more so than any other attribute measured.

- The six attributes with the most potential to impact overall perception of Pittsburgh are:
  - Vibrant, Clean, Youthful, Innovative, High-tech and Energetic

- "Arts and Culture Center", "Education Center", "Unique" and "Corporate HQ" are among the attributes that are highly descriptive of Pittsburgh.

- Pittsburgh is not considered to be "High-Tech", "Edgy", "Youthful" or "Green / Environmental." These are the region's best kept "secrets."

- Any visit to Pittsburgh within the past 10 years is positively correlated to perceptions of Downtown.

SUMMARY OF VERBATIM COMMENTS

Coded Responses	Count	% of responses	% of cases
Steel / factories	12	10.3	15.2
Rivers	11	9.5	13.9
Sports stadiums	10	8.6	12.7
Revitalization, recovery	9	7.8	11.4
Pgh Steelers	7	6	8.9
Tall buildings, skyline	6	5.2	7.6
Industrial, blue collar	6	5.2	7.6
Bridges	6	5.2	7.6
Old, history	5	4.3	6.3
Great city, nice city	5	4.3	6.3
Riverfront development & activities	4	3.4	5.1
Dining, good food, ethnic food	3	2.6	3.8
Arts/culture	3	2.6	3.8
Dirty	2	1.7	2.5
Good public tansit	2	1.7	2.5
Declining, struggling	2	1.7	2.5
Shopping	2	1.7	2.5
PPG Building	2	1.7	2.5
Sports	2	1.7	2.5
Interesting architecture	2	1.7	2.5
Downtown Pittsburgh Partnership	2	1.7	2.5
Pgh Penguins	1	0.9	1.3
Beautiful	1	0.9	1.3
No one lives there	1	0.9	1.3
Ethnically homogenous	1	0.9	1.3
Lots to do	1	0.9	1.3
Exciting	1	0.9	1.3
Eclictic downtown	1	0.9	1.3
Beautiful but underutilized	1	0.9	1.3
Business district	1	0.9	1.3
The Income	1	0.9	1.3
The mall with old high chimneys	1	0.9	1.3
City of Pittsburgh website	1	0.9	1.3
Renovated train station	1	0.9	1.3

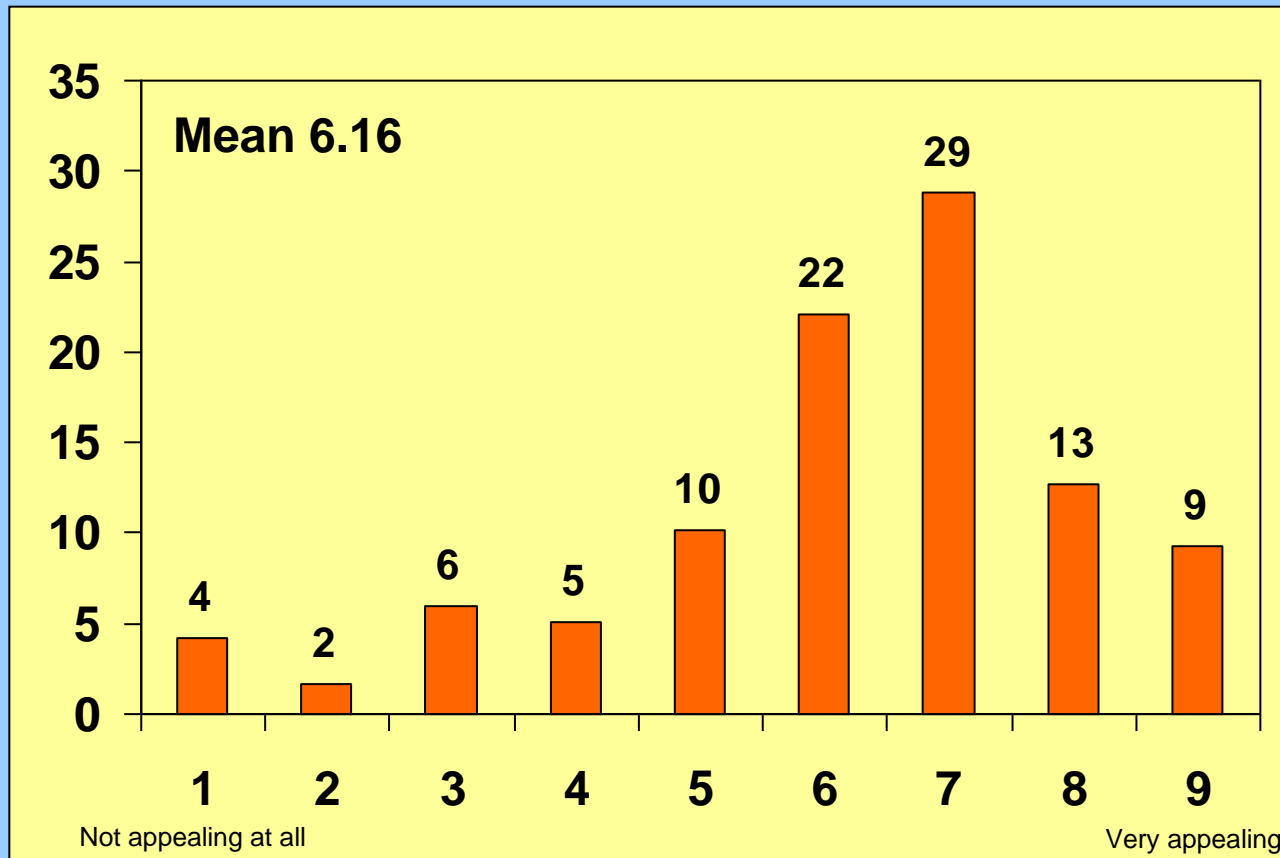The legacy of steel manufacturing in Pittsburgh continues to define the city for many.

Many comments related to buildings, bridges and other architectural aspects emerge as a common theme.

Most comments were of a positive nature.

When you hear "Downtown Pittsburgh" what is the first thing that comes to mind?
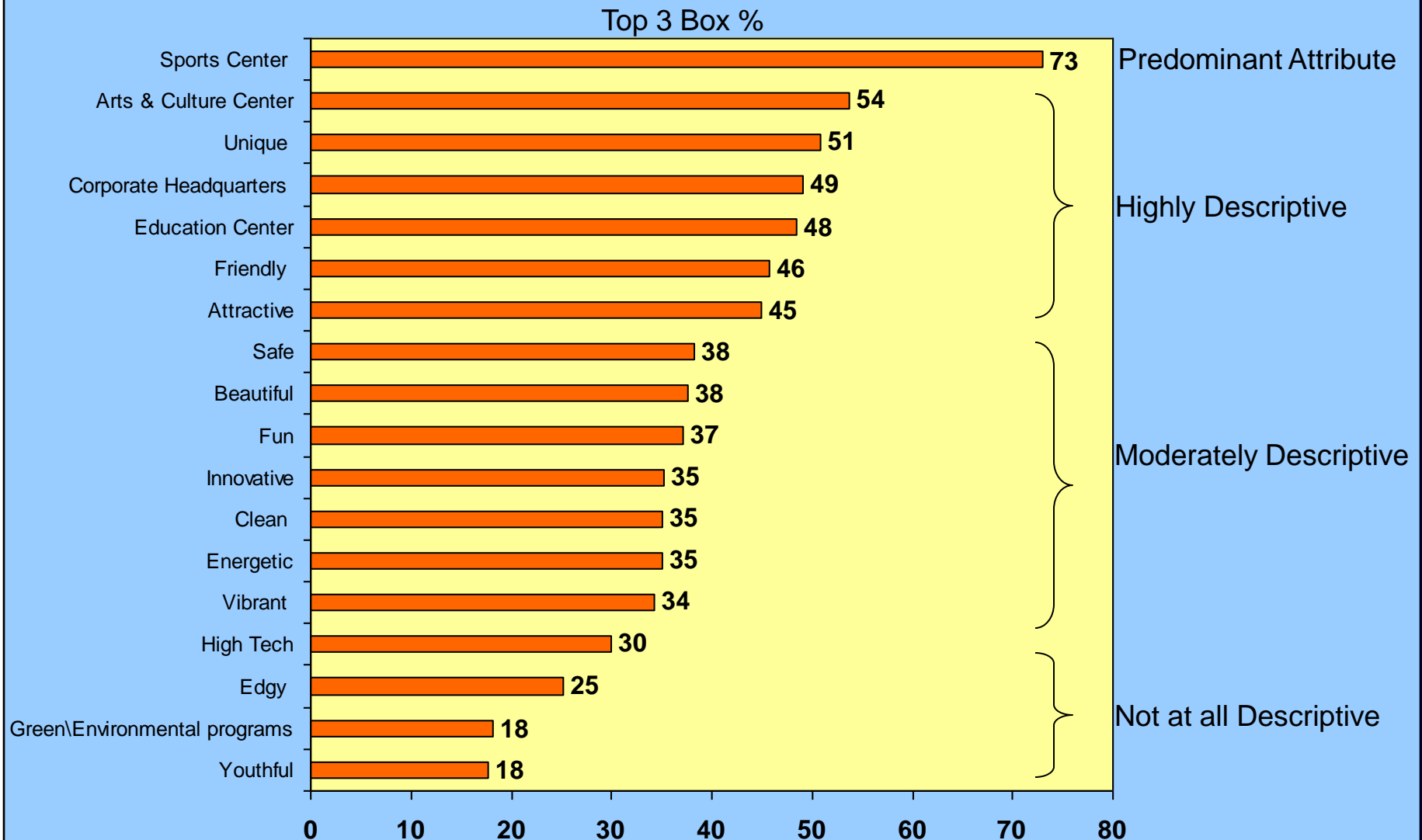
N= 79 Respondents
116 Coded comments

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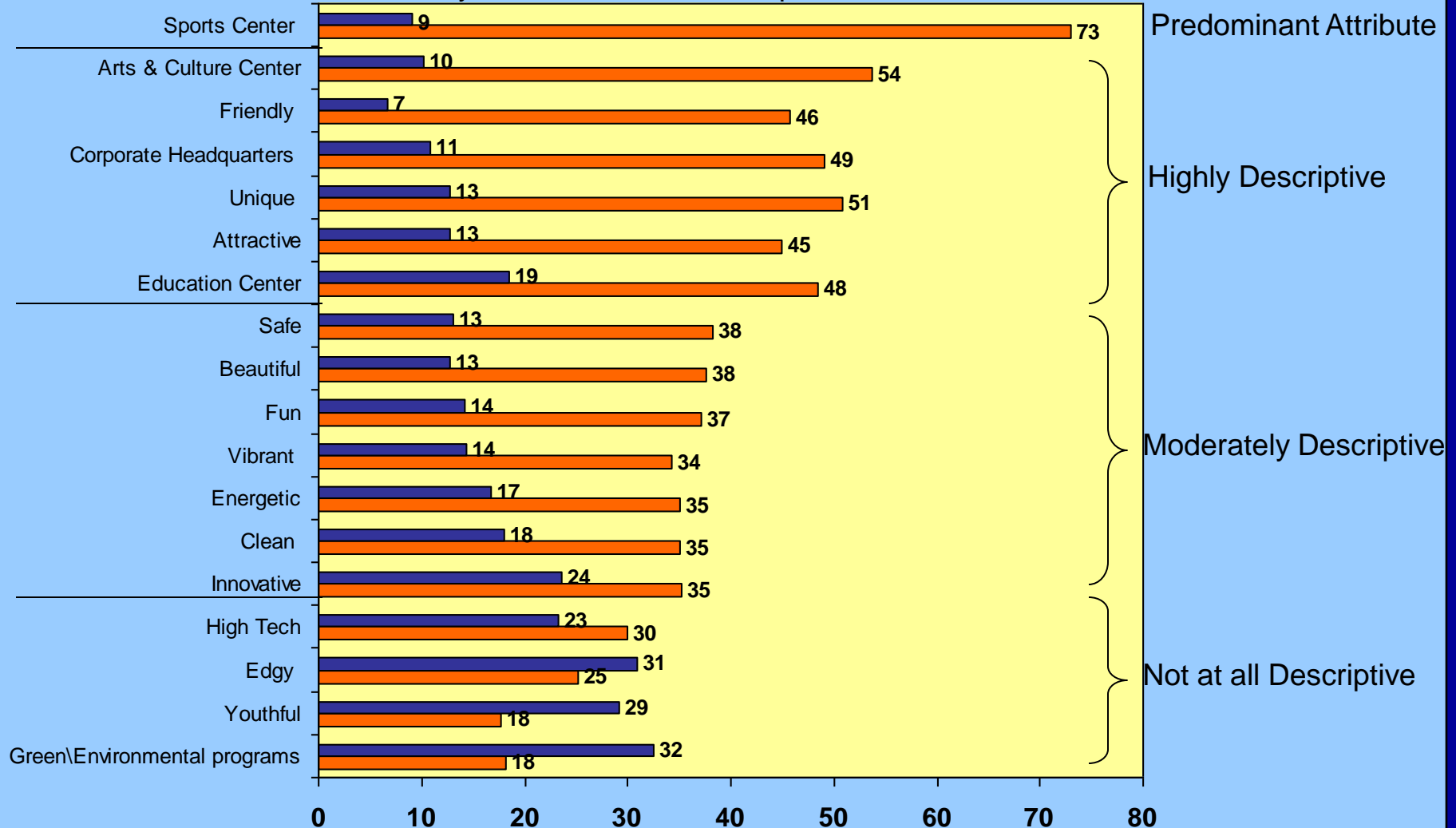
OVERALL PERCEPTION OF DOWNTOWN PITTSBURGH

Please indicate your overall perception of Downtown Pittsburgh.
Use a scale from 1 to 9, where 1 = "Not appealing at all" and 9 = "Very appealing" to indicate your response.
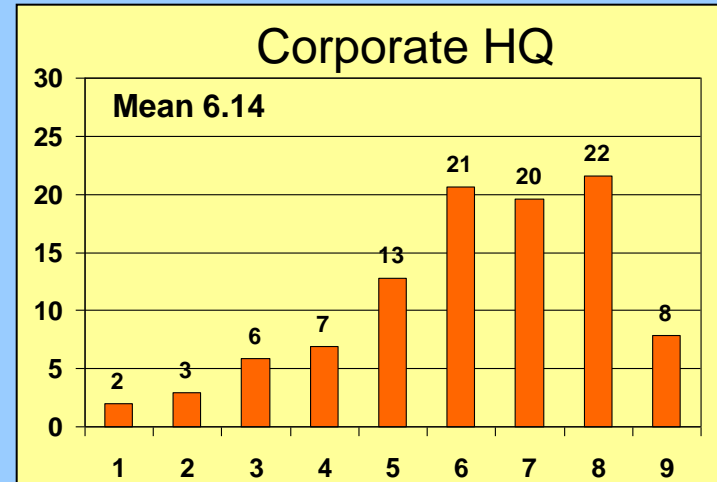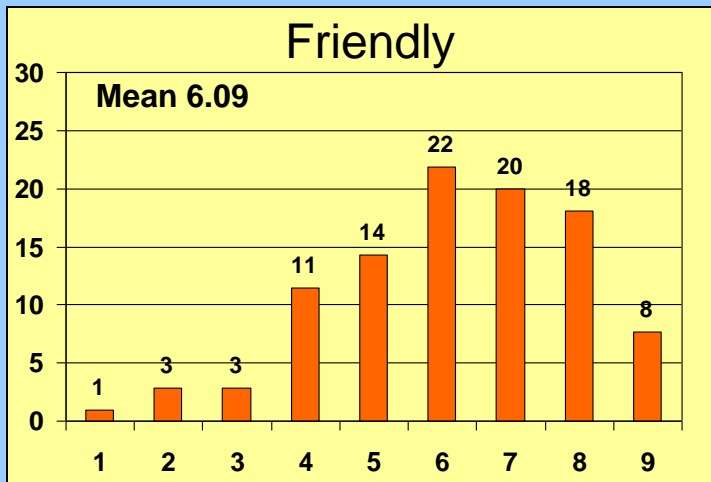
SUMMARY OF DESCRIPTIVE ATTRIBUTES

Top 3 Box %

Attribute	Value
Sports Center	73
Arts & Culture Center	54
Unique	51
Corporate Headquarters	49
Education Center	48
Friendly	46
Attractive	45
Safe	38
Beautiful	38
Fun	37
Innovative	35
Clean	35
Energetic	35
Vibrant	34
High Tech	30
Edgy	25
Green\Environmental programs	18
Youthful	18

Predominant Attribute

Highly Descriptive
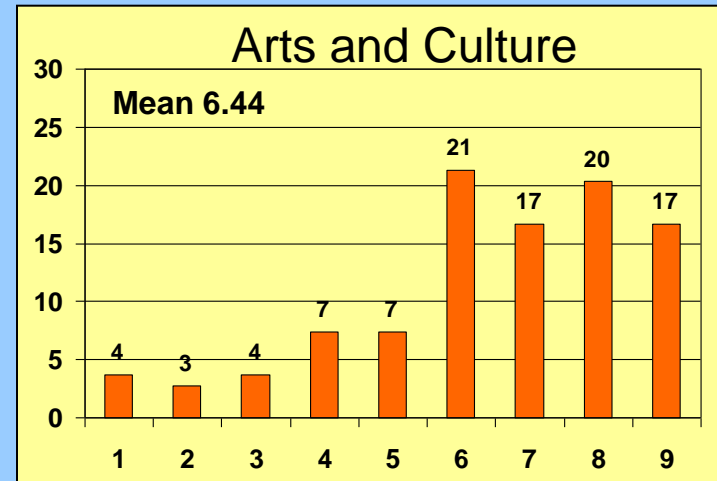
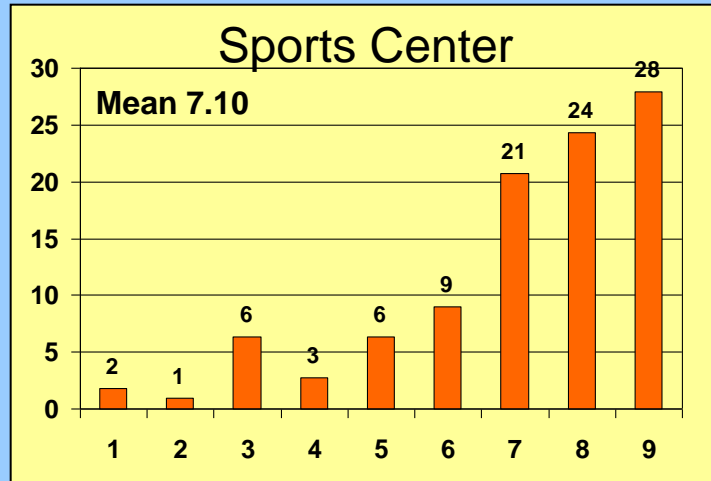Moderately Descriptive

Not at all Descriptive

SUMMARY OF DESCRIPTIVE ATTRIBUTES

Sorted By Difference Between Top 3 and Bottom 3 Box %

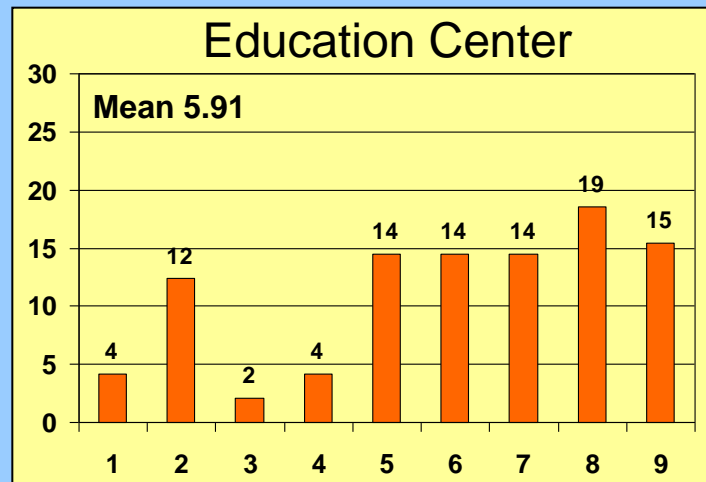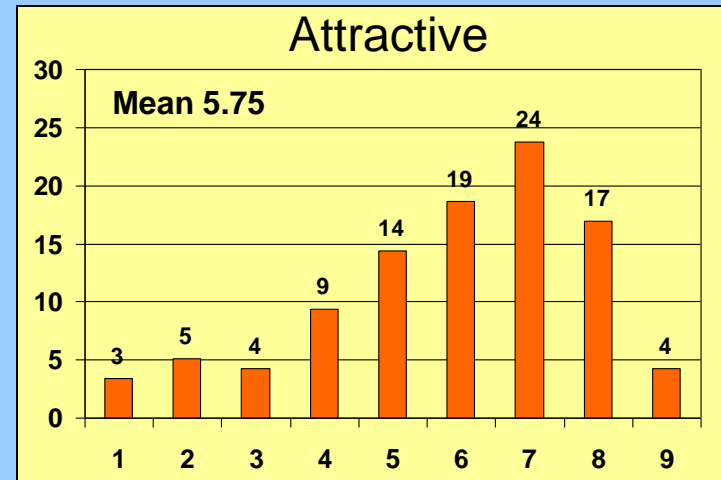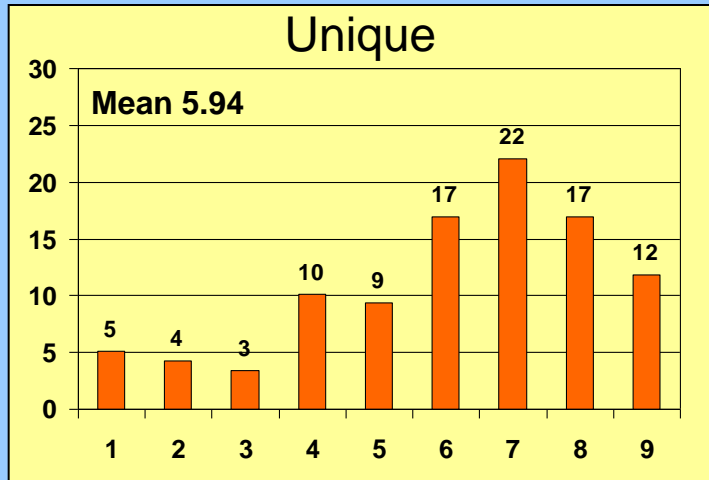| Attribute	Bottom 3 Box %	Top 3 Box %	Category
Sports Center	9	73	Predominant Attribute
Arts & Culture Center	10	54	Highly Descriptive
Friendly	7	46	
Corporate Headquarters	11	49	
Unique	13	51	
Attractive	13	45	
Education Center	19	48	
Safe	13	38	Moderately Descriptive
Beautiful	13	38	
Fun	14	37	
Vibrant	14	34	
Energetic	17	35	
Clean	18	35	
Innovative	24	35	
High Tech	23	30	Not at all Descriptive
Edgy	31	25	
Youthful	29	18	
Green\Environmental programs	32	18	

Top 3 Box % Bottom 3 Box %

MOST DESCRIPTIVE ATTRIBUTES

Sports Center

Mean 7.10

Scale	Count
1	2
2	1
3	6
4	3
5	6
6	9
7	21
8	24
9	28

Arts and Culture

Mean 6.44

Scale	Count
1	4
2	3
3	4
4	7
5	7
6	21
7	17
8	20
9	17

Friendly

Mean 6.09

Scale	Count
1	1
2	3
3	3
4	11
5	14
6	22
7	20
8	18
9	8

Corporate HQ

Mean 6.14

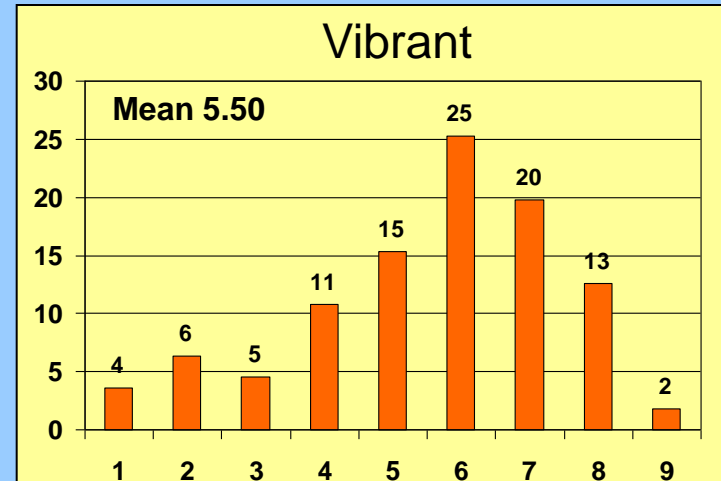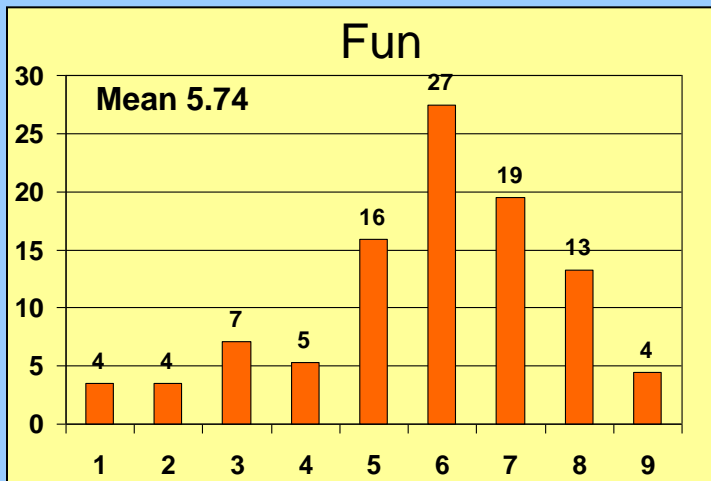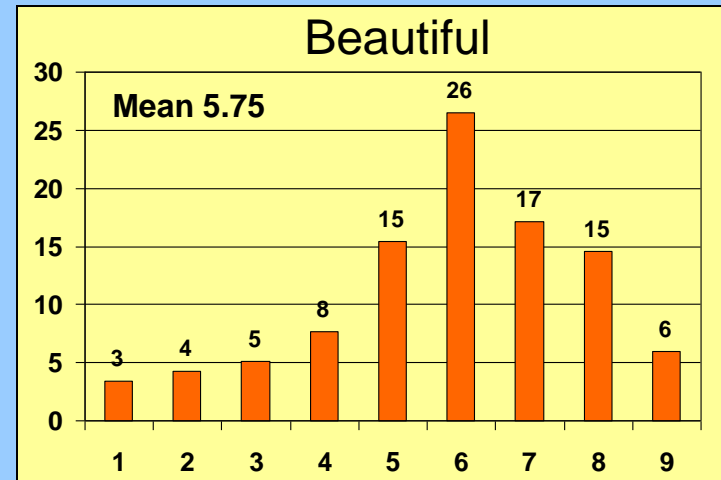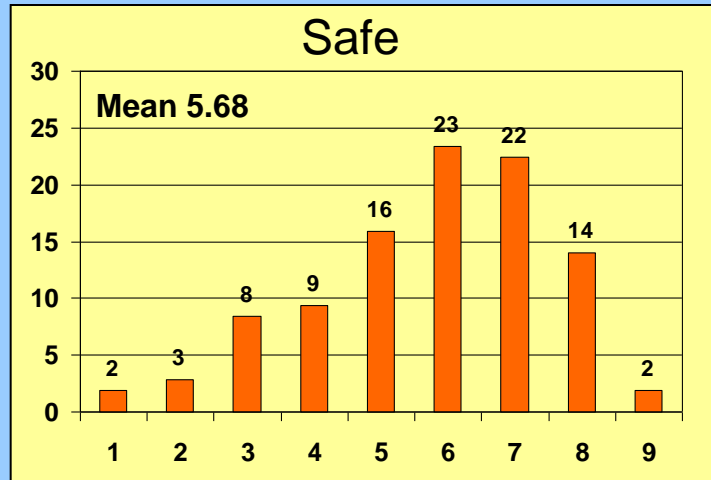| Scale	Count
1	2
2	3
3	6
4	7
5	13
6	21
7	20
8	22
9	8

Using a scale from 1 to 9 where 1 = "Does not describe at all" and 9 = "Describes very well", indicate how well the following phrases describe Downtown Pittsburgh.

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MOST DESCRIPTIVE ATTRIBUTES

Using a scale from 1 to 9 where 1 = "Does not describe at all" and 9 = "Describes very well", indicate how well the following phrases describe Downtown Pittsburgh.

MODERATELY DESCRIPTIVE ATTRIBUTES
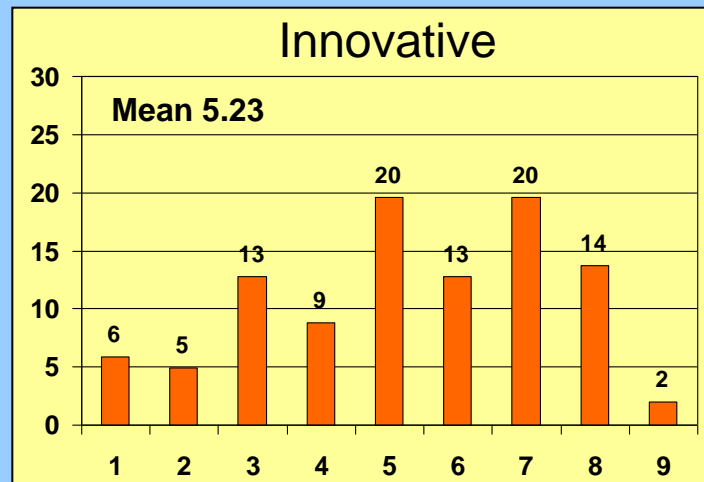

Using a scale from 1 to 9 where 1 = "Does not describe at all" and 9 = "Describes very well", indicate how well the following phrases describe Downtown Pittsburgh.

MODERATELY DESCRIPTIVE ATTRIBUTES
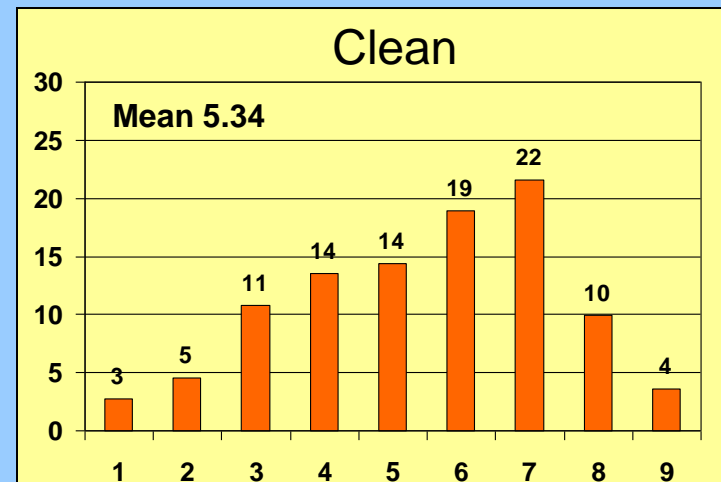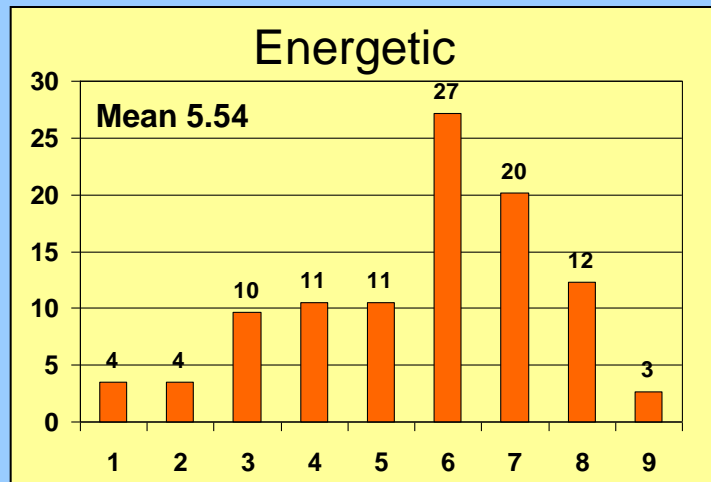

Using a scale from 1 to 9 where 1 = "Does not describe at all" and 9 = "Describes very well", indicate how well the following phrases describe Downtown Pittsburgh.

12

LEAST DESCRIPTIVE ATTRIBUTES

High Tech
Mean 5.09

1	2	3	4	5	6	7	8	9
8	6	10	11	17	19	19	10	1

Edgy
Mean 4.71

1	2	3	4	5	6	7	8	9
8	7	15	8	19	17	18	5	3

Youthful
Mean 4.72

1	2	3	4	5	6	7	8	9
7	9	13	16	21	17	5	10	2

Green/Environmental Programs
Mean 4.46

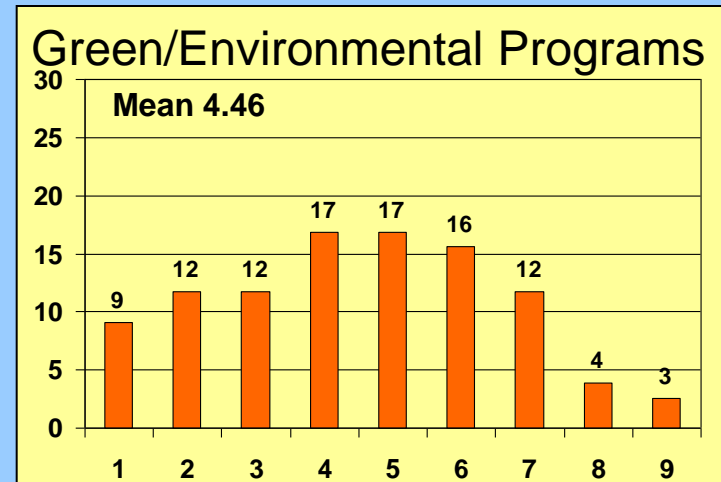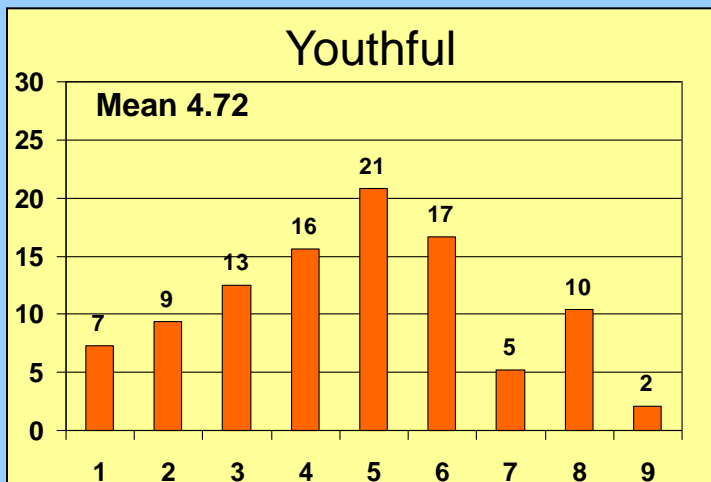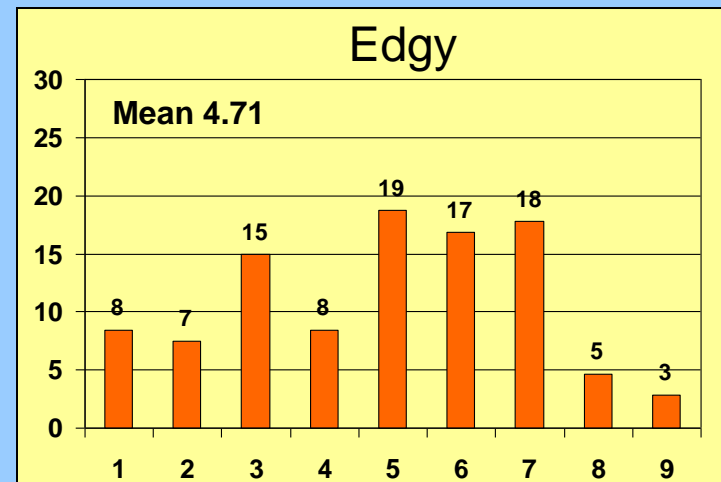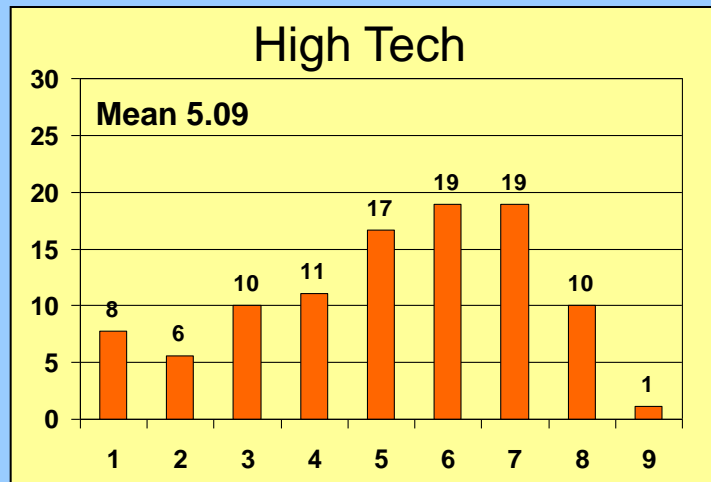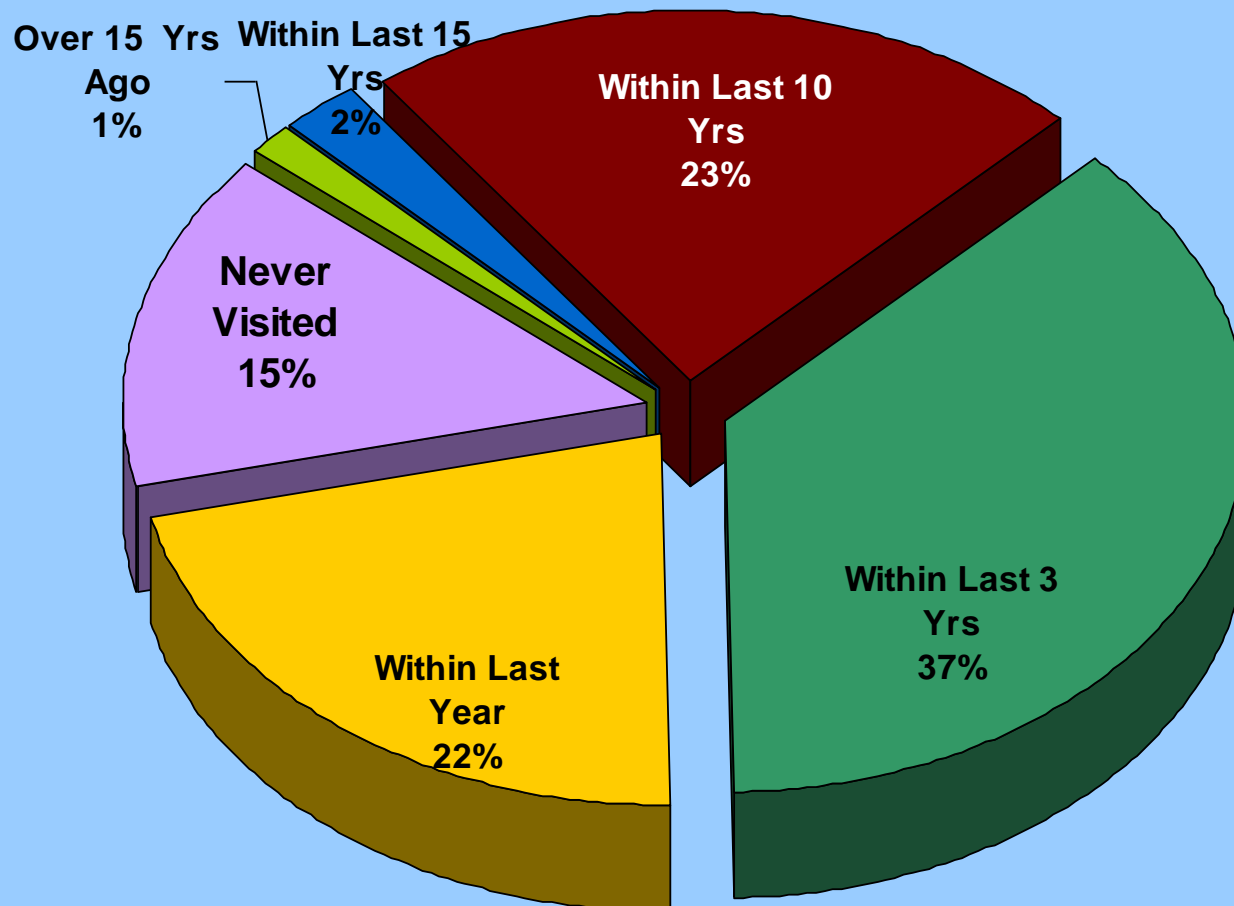| 1	2	3	4	5	6	7	8	9
9	12	12	17	17	16	12	4	3

Using a scale from 1 to 9 where 1 = "Does not describe at all" and 9 = "Describes very well",
indicate how well the following phrases describe Downtown Pittsburgh.

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FAMILIARITY WITH PITTSBURGH

60% have visited Pittsburgh within the past 3 years or less.

INFLUENCE OF VISITS ON PERCEPTIONS

Attribute	Top 3 Box %			More than 10 years ago or Never
	Past 1 Year	Past 3 Years	Past 10 Years	
Overall Perception	41	56	**60**	33
Sports Center	65	82	**84**	44
Arts & culture Center	**62**	59	56	27
Friendly	32	54	**60**	13
Corporate Headquarters	43	**59**	54	25
Unique	**54**	**54**	44	28
Attractive	29	**57**	48	22
Education Center	38	52	**55**	38
Safe	**42**	39	38	19
Beautiful	37	**45**	36	11
Fun	33	**45**	39	11
Vibrant	21	**41**	40	22
Energetic	25	**41**	29	23
Clean	21	36	**47**	13
Innovative	25	**47**	28	24
High Tech	35	**39**	13	18
Edgy	**26**	18	**26**	18
Green/Environmental Programs	**26**	14	21	7
Youthful	17	**21**	**21**	6

Bold items reflect highest % of top 3 box for the attribute

- **Those who have not been to the area in a while are most likely to define Pittsburgh by one dimension, Sports.**
- **Recent visitors are more likely to see Pittsburgh as edgy and "green."**

DESIRABILITY
DRIVER
ANALYSIS

OVERVIEW OF METHODOLOGY

Purpose of Desirability Driver Analysis

Reveal the key triggers to overall perception with a product or brand, or in this case, a downtown region.

Break down traditional "perception" measures into a salient attribute set that can be traced and tracked over time

Prioritize and design initiatives targeted to improve overall perception.

Basics of the Analysis

Combines 2 respondent measurements:

1 - Performance = The % of respondents w/ high ratings

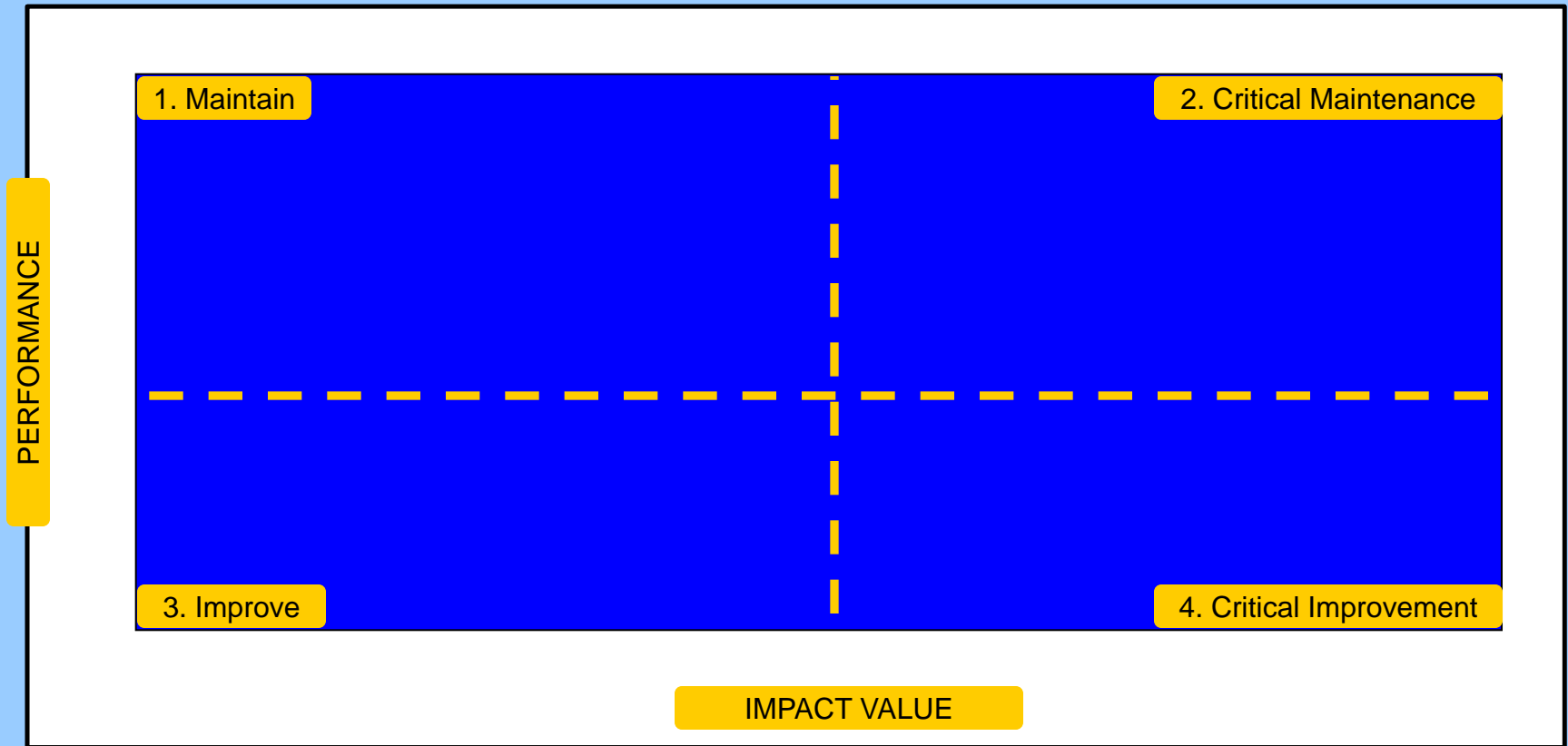2 - Impact = The rate of change in performance

The Management Tool

The 2 measures are plotted on the Desirability Driver Map, a tool that prioritizes which attributes of product / brand warrant attention

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THE DESIRABLITY DRIVER MAP

- The DDA Map combines performance ratings (perception) and impact values to classify and prioritize evaluation criteria into 4 categories:
  1. Maintain   2. Critical Maintenance   3. Improve   4. Critical Improvement

- "Critical Improvement", the fourth quadrant of the map, contains the attributes which have the greatest impact on Downtown Pittsburgh's overall rating, and which currently are performing (rated) the worst.

- Improving the performance of "Critical Improvement" attributes will most directly improve the overall rating and overall perception of Downtown Pittsburgh. This quadrant's attributes warrant the most attention.

DESIRABILITY DRIVER MAP
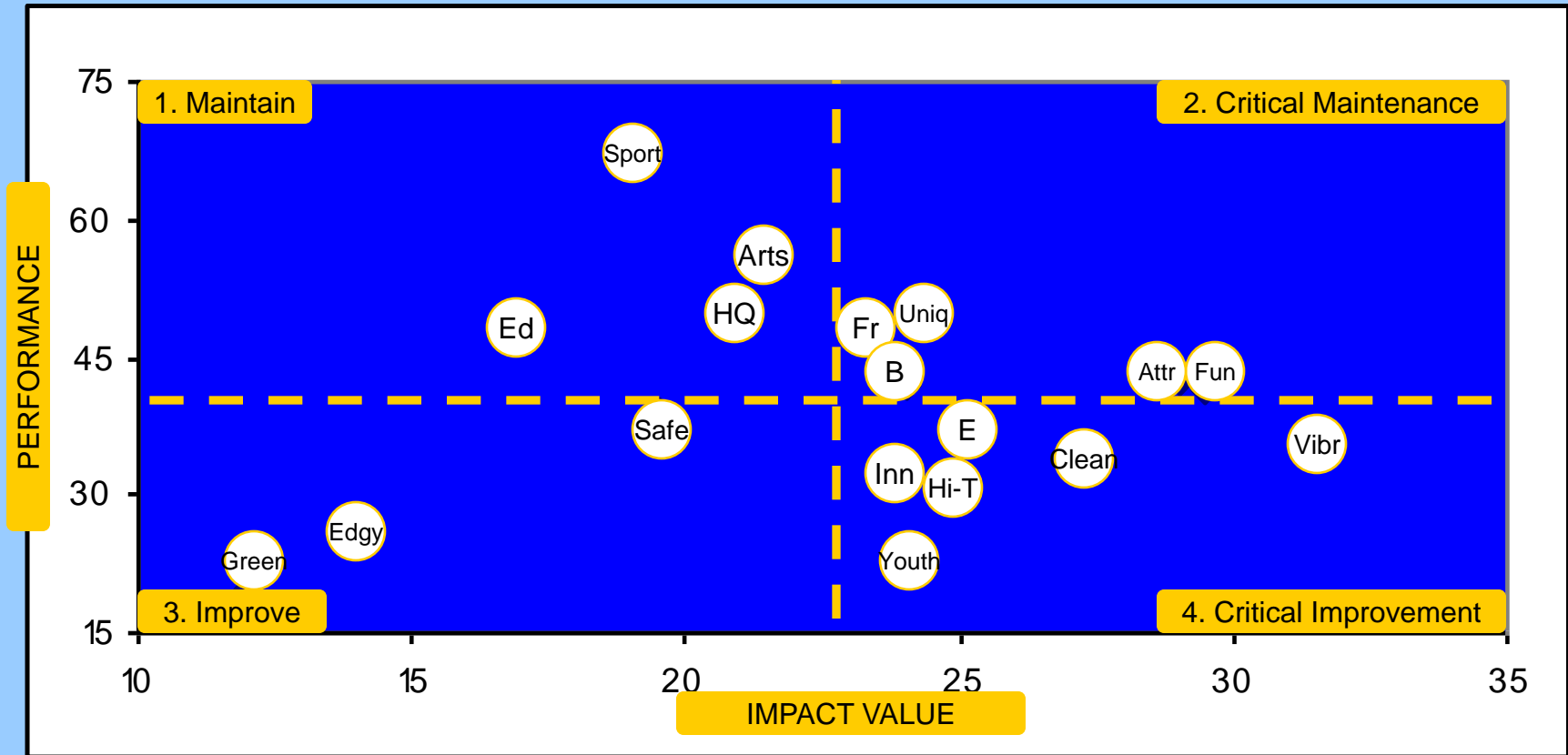
PERFORMANCE

1. Maintain

2. Critical Maintenance

3. Improve

4. Critical Improvement

IMPACT VALUE

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DESIRABILITY DRIVER MAP

PERFORMANCE

IMPACT VALUE

1. Maintain
2. Critical Maintenance
3. Improve
4. Critical Improvement

Inn = Innovative	Youth = Youthful		Attr = Attractive	Ed = Education Center
E = Energetic	Safe		B = Beautiful	Arts = Art/Cultural Center
Hi-T = High Tech	Clean	Edgy	Fr = Friendly	HQ = Corporate Headqtrs
Vibr = Vibrant	Fun	Green	Uniq = Unique	Sport = Sports Center

SUMMARY OF DDA GRID

The Critical Improvement quadrant displays the satisfaction components which have a higher than average impact on Downtown's overall image, but a lower than average performance score. Critical Improvement areas:

Vibrant

Clean

Youthful

Innovative

High-tech

Energetic

Improving the perception and association of Downtown Pittsburgh with these attributes is the most direct way to improve Downtown Pittsburgh's overall perception.

The Critical Maintenance quadrant displays the attributes which have a higher than average impact on overall Pittsburgh Image and a higher than average performance score. Critical Maintenance applies to the following:

Critical Maintenance areas:

Fun

Attractive

Unique

Friendly

Beautiful

RECOMMENDATIONS

Leverage strength of attributes that currently define Pittsburgh.

- Continue to promote Arts and Cultural District assets.
- Use the Sports Center connection as a hook, but try to help audiences see the region beyond that.

Get the word out on Pittsburgh's lesser-known attributes.

- "High-tech" and "Youthful" – Greater potential for overall impact
- "Edgy" and "Green" – Much lower potential for impact

Improve attributes that matter the most

- Focus on improving the perception of Pittsburgh on the attributes that fall in the Critical Improvement quadrant will have the most impact on overall perception.

Questionnaire

DOWNTOWN PITTSBURGH IMAGE STUDY – Wave 1 (June, 2007)

Q1. When you hear "Downtown Pittsburgh" what is the first thing that comes to mind?
_____

Q2. Next, please indicate your overall perception of Downtown Pittsburgh. Use a scale from 1 to 9, where 1 = "Not appealing at all" and 9 = "Very appealing" to indicate your response.

Overall Perception of Downtown Pittsburgh   1   2   3   4   5   6   7   8   9   DK

Q3. Using a scale from 1 to 9 where 1 = "Does *not* describe at all" and 9 = "Describes very well", indicate how well the following phrases describe Downtown Pittsburgh.

A	Arts & Culture Center	1	2	3	4	5	6	7	8	9	DK
B	Attractive	1	2	3	4	5	6	7	8	9	DK
C	Beautiful	1	2	3	4	5	6	7	8	9	DK
D	Clean	1	2	3	4	5	6	7	8	9	DK
E	Corporate Headquarters	1	2	3	4	5	6	7	8	9	DK
F	Edgy	1	2	3	4	5	6	7	8	9	DK
G	Education Center	1	2	3	4	5	6	7	8	9	DK
H	Energetic	1	2	3	4	5	6	7	8	9	DK
I	Friendly	1	2	3	4	5	6	7	8	9	DK
J	Fun	1	2	3	4	5	6	7	8	9	DK
K	Green\Environmental programs	1	2	3	4	5	6	7	8	9	DK
L	High Tech	1	2	3	4	5	6	7	8	9	DK
M	Innovative	1	2	3	4	5	6	7	8	9	DK
N	Safe	1	2	3	4	5	6	7	8	9	DK
O	Sports Center	1	2	3	4	5	6	7	8	9	DK
P	Unique	1	2	3	4	5	6	7	8	9	DK
Q	Vibrant	1	2	3	4	5	6	7	8	9	DK
R	Youthful	1	2	3	4	5	6	7	8	9	DK

Q4. Which ONE category best describes your most recent visit to Downtown Pittsburgh?

A) Within the past year
B) Within the past 3 years
C) Within the past 10 years
D) Within the past 15 years
E) Over 15 years ago
F) I have never personally visited Downtown Pittsburgh

-------------------- For Classification Purposes Only --

Q5. Which category best describes your professional position?
A) CEO   B) VP / Department Head   C) Mid-level Manager
D) Administrative   E) Other (specify) _____

Q6. Where do you currently live?
A) City:_____ B) County:_____ C) State/Province:_____

Q7. Which range below includes your age?
A) < 30   B) 30-39   C) 40-49   D) 50-59   E) 60-69   F) 70+

Q8. Please indicate your gender.
A) Male   B) Female

This completes the survey. Thank you for your cooperation.