Downtown Resident Study

Pittsburgh Downtown Partnership

June 2010

Prepared by: STRATEGIC METRICS GROUP

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SUMMARY OF KEY FINDINGS

- **The demographic profile of DT residents is very similar to the baseline profile established in 2008. Income levels remain much higher than the incomes of City of Pittsburgh residents. 25-29 remains the peak (most likely) age group of residents. Starting at the age of 30, incidence drops steadily until the late 40s when incidence begins to rise. Race, Marital Status, and Household Size statistics are very consistent with the baseline 2008 findings.**

- **The typical resident takes about 15 months to work through the process of moving Downtown (from the initial idea → housing search → move in). Internet is the most important resource used in the housing search; followed by magazines/guides/newspapers, and friends.**

- **Satisfaction with "decision to move Downtown" and "choice of building/property" remains high (slightly higher than 2008). Heinz Lofts, 930 Penn, 151 Firstside, and Pennsylvanian tenants report the highest satisfaction with their building; Carlyle and Mid Town Towers tenants register the lowest average scores.**

- **Downtown attributes with the greatest POSITIVE impact on residents' quality of life:**
  - **Close to work, Convenience (centralized), Access to restaurants/events/activities**
- **Downtown attributes with the greatest NEGATIVE impact on residents' quality of life:**
  - **Lack of grocery stores, Inadequate retailer hours (close too early, no weekends), Traffic (vehicular)**
  - ***Safety/security* issues, the #1 mention in '08, has *dropped* to the #8 mention in 2010**

- **A grocery store is by far the type of retail business residents most want to see move into Downtown; clothing stores & restaurants/bars are distant 2nd and 3rd mentions. Giant Eagle, Whole Foods, Trader Joe's are the most popular specific grocers desired by residents.**

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PITTSBURGH DOWNTOWN PARTNERSHIP

SUMMARY OF KEY FINDINGS (2)

- To improve Downtown dining, residents are most likely to suggest:
  - Stay open later/more weekend hours, More “casual”/chain options, More ethnic options, More “mid-price” restaurants.

- Residents, on average, dine/eat out 11.5 times per month in Downtown. They spend almost $290 per month per person.

- Awareness of the Harris Theater, and knowledge of its location, are relatively high. In terms of actual attendance, about 1 in 4 residents have been to a Harris movie. Among the Harris patrons, satisfaction with Harris’s movie offerings is low (6.0 on a 9 point scale). Suggestions to increase patronage at the theater are mixed; some residents want more old/“classic” movies, some want more current films, others want live acts.

- Residents strongly desire breakfast/brunch food vendors (especially on weekends) in Market Square.

- Concerts and music-related programs are the types of events residents most want to attend with neighbors in their Downtown neighborhood.

- Bus usage, “T” usage, and walking (as a mode of transportation) all increase sharply once residents move Downtown. ZipCar awareness is slightly lower than in 2008; however membership rates remain the same.

- Most residents prefer the Block Party be held on Fifth Avenue. Residents’ 2nd most popular choice for the Block Party site is Market Square.

Respondent Demographics

Decision to Move Downtown

Satisfaction with Downtown Living

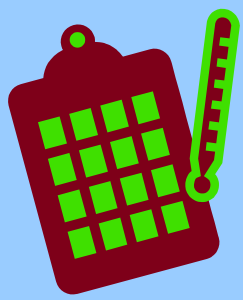
Groceries & Other Retailers

Harris Theater & Resident Events

Transportation, Parking & ZipCar

PRIZM$_{ne}$ Household Profiles

METHODOLOGY & OVERVIEW



Methodology

3,864 paper surveys sent via mail to residents in PDP's data base

An on-line version of the survey hosted on SMG's website also collected responses from residents

"Reminder" postcards were sent out to boost the response rate

Data collected: April 27th – May 25th

No $ incentive provided to residents

Overview - Study Results

510 surveys collected (24% more than 2008)

510 out of 3,864 = 13% response rate

92 on-line + 418 paper = 510 total

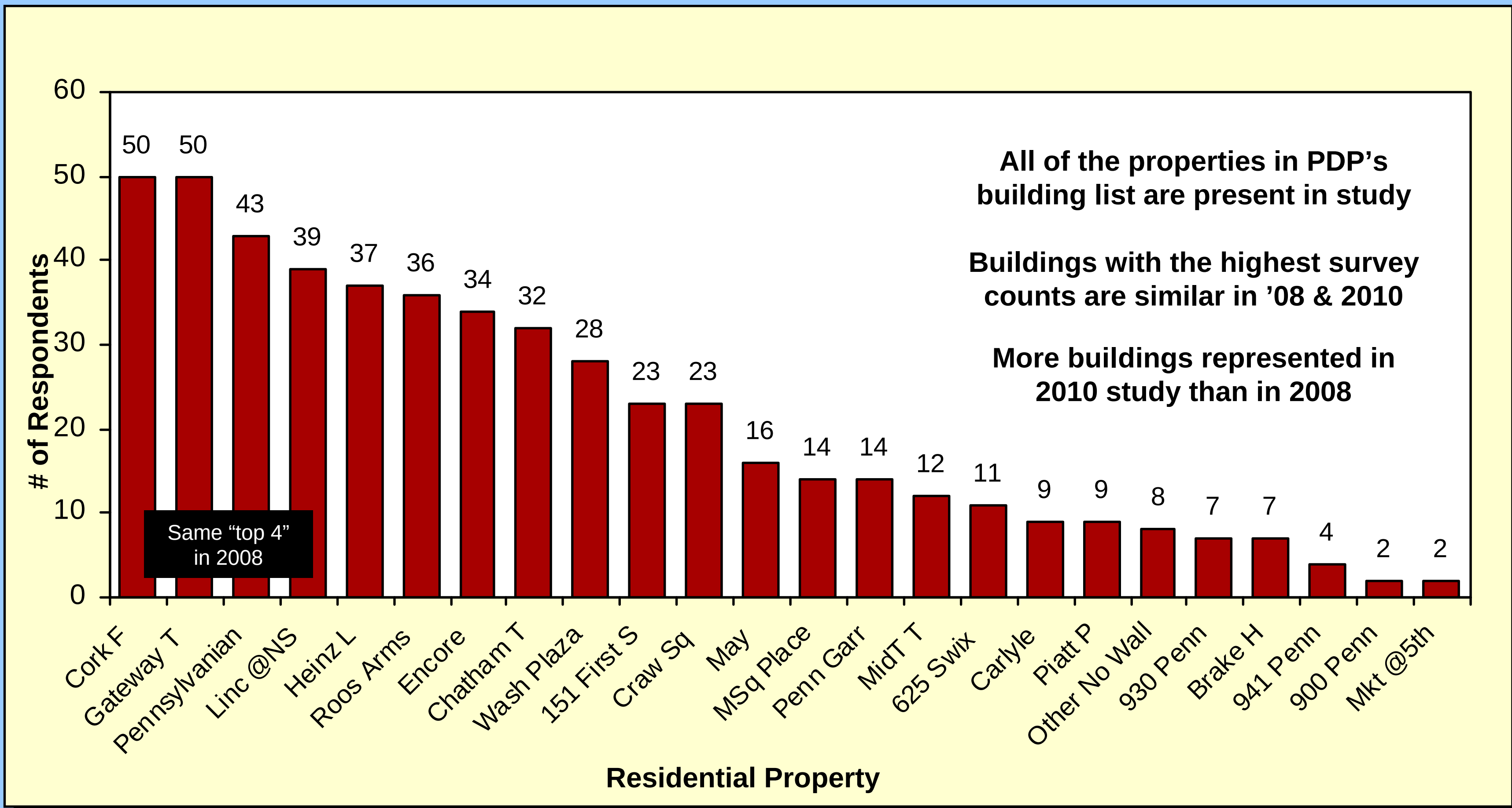
"Reminder" postcard boosted response by almost 90 surveys (very productive)

Surveyed residents represent an even mix of Downtown's buildings/properties

DEMOGRAPHICS OF RESIDENT RESPONDENTS

BUILDING / PROPERTY

Current Residences of Study Respondents



n = 510

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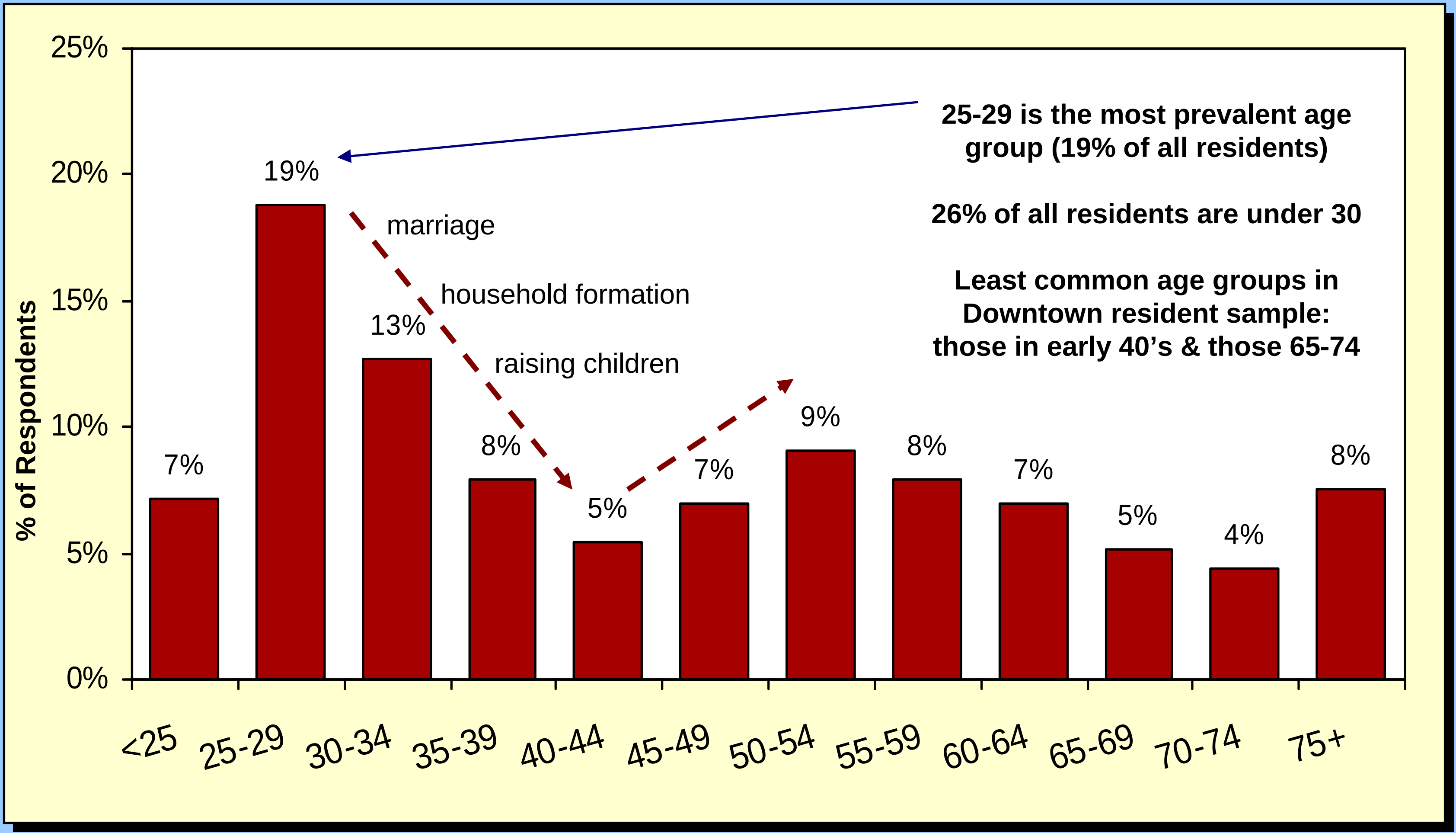
AGE OF RESIDENTS

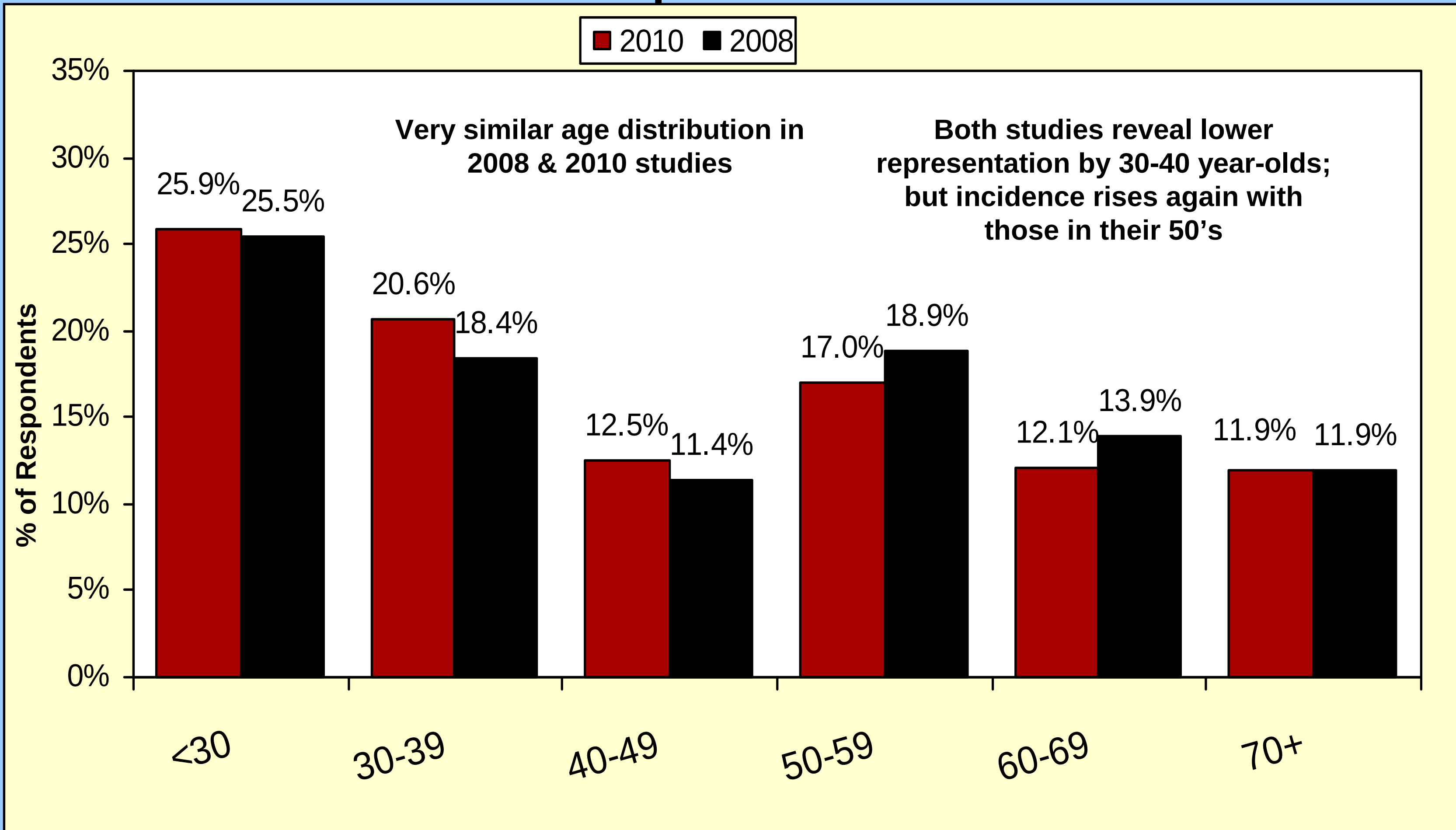
Percent of Residences by Age Group



n = 505

AGE GROUP COMPARISON

2008 & 2010 Comparison - % of Residents



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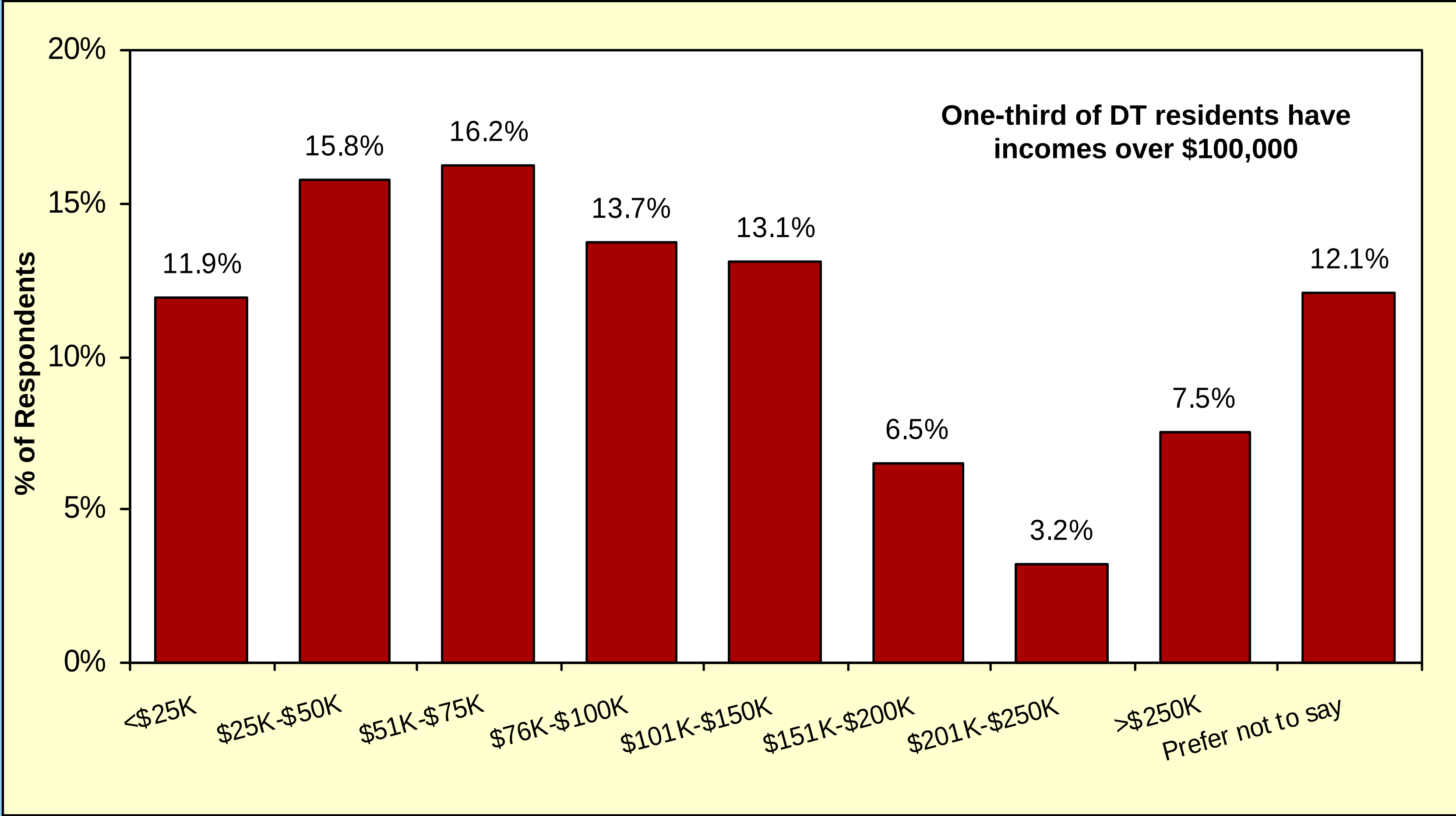
PITTSBURGH DOWNTOWN PARTNERSHIP

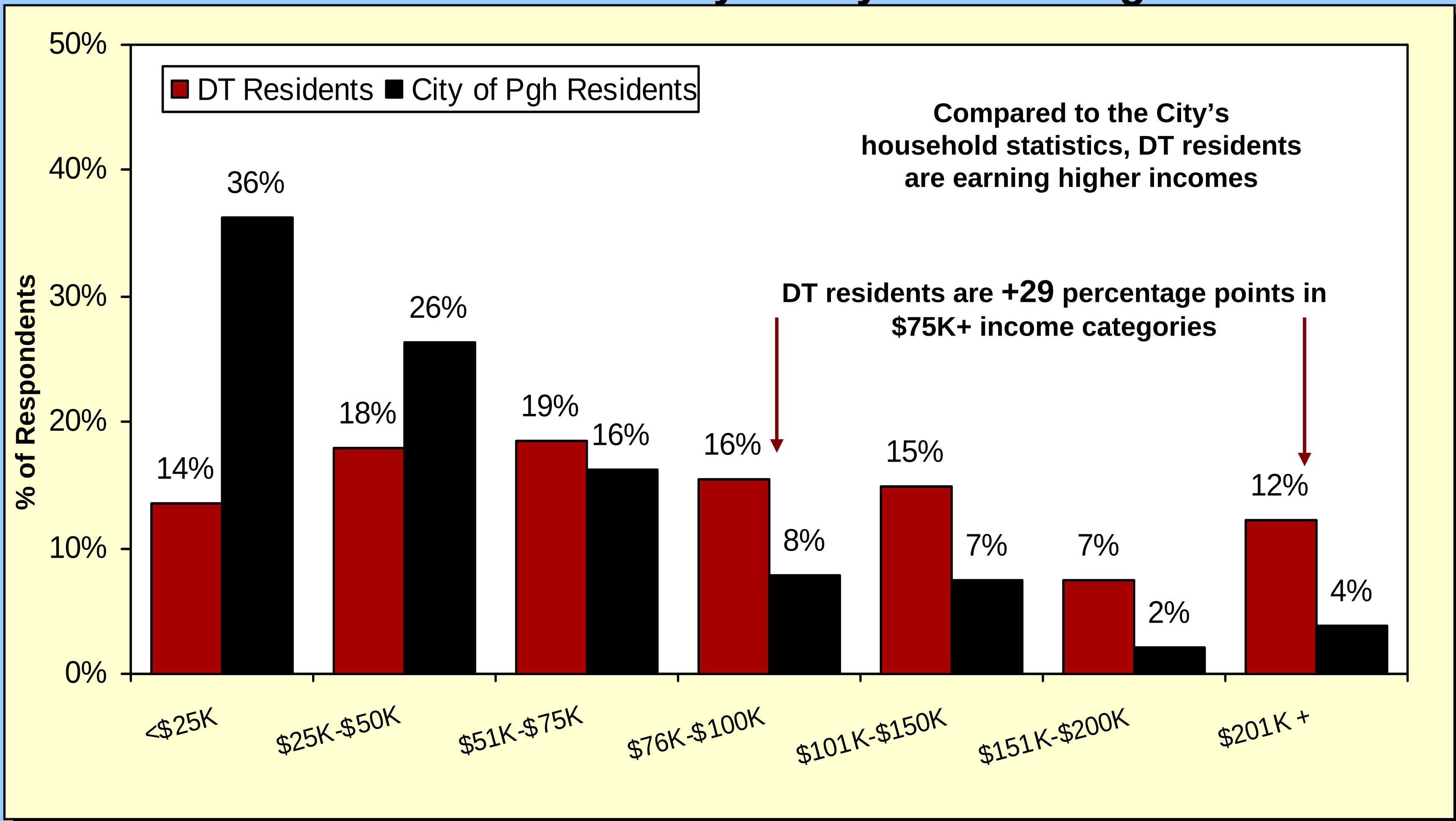
TOTAL ANNUAL HOUSEHOLD INCOME

Percent of Residences by Income Category



n = 505

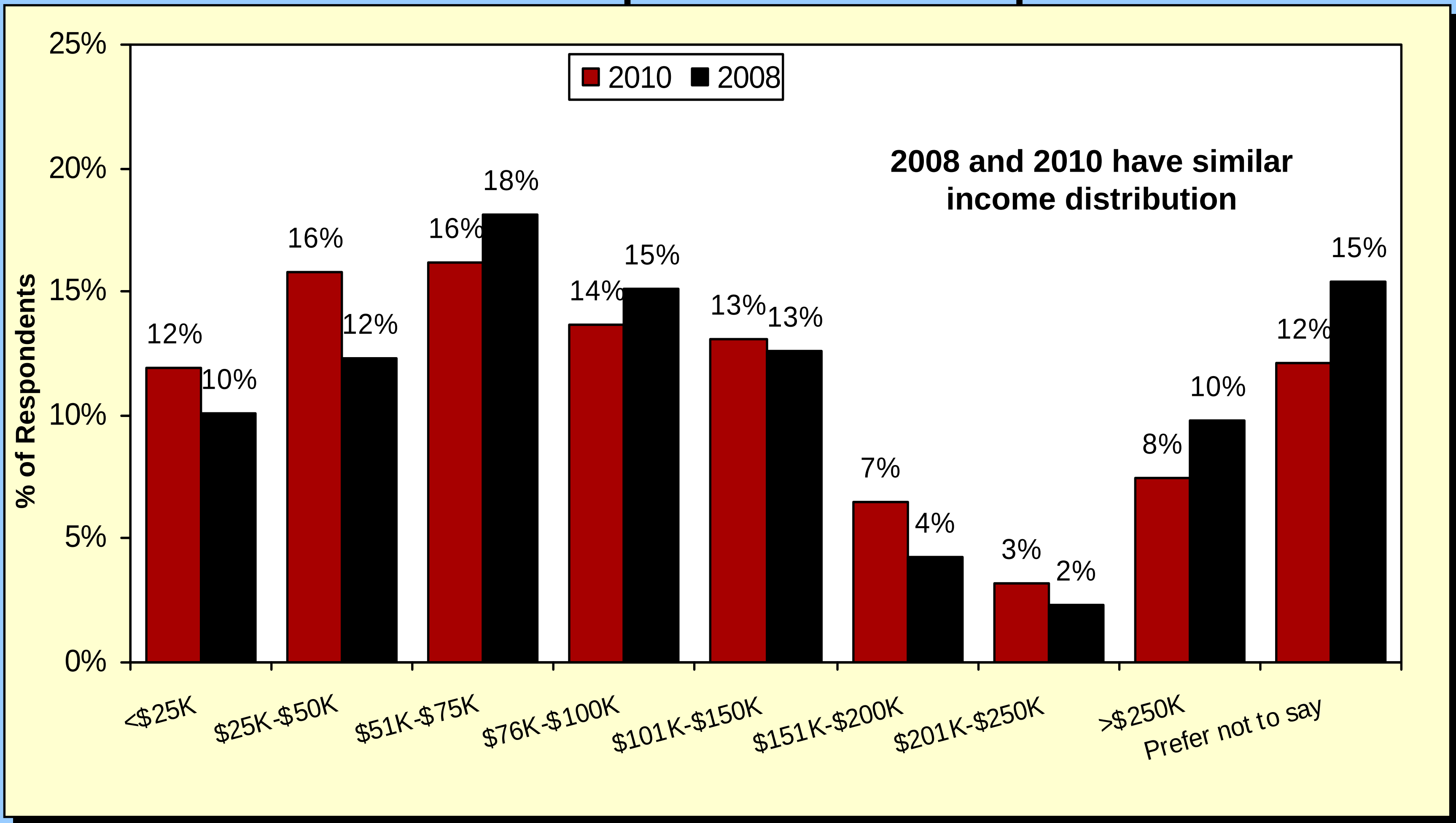
HOUSEHOLD INCOME COMPARISON
2010 Resident Study & City of Pittsburgh



In order to compare 2010 study results with City of Pittsburgh HH income data, the "prefer not to answer" responses were removed from the 2010 percentages. The source for the City of Pittsburgh statistics is the ACS (American Community Survey 2008).

HOUSEHOLD INCOME COMPARISON

2008 & 2010 Comparison - % of Respondents



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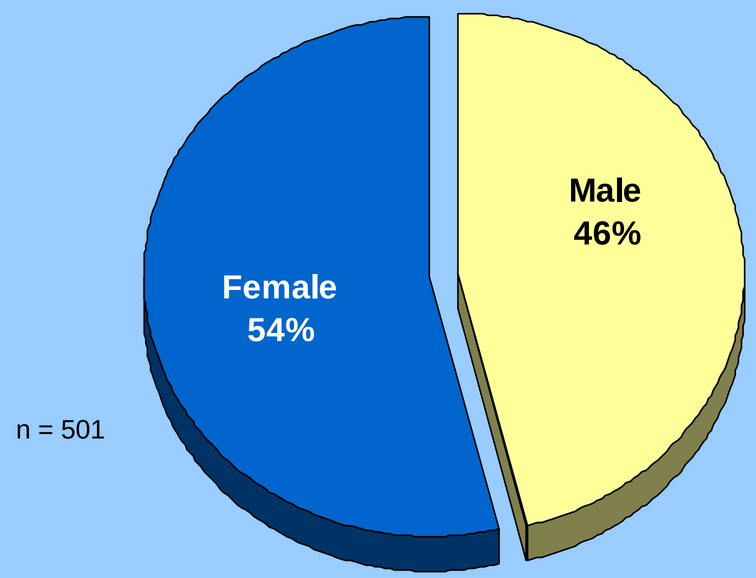
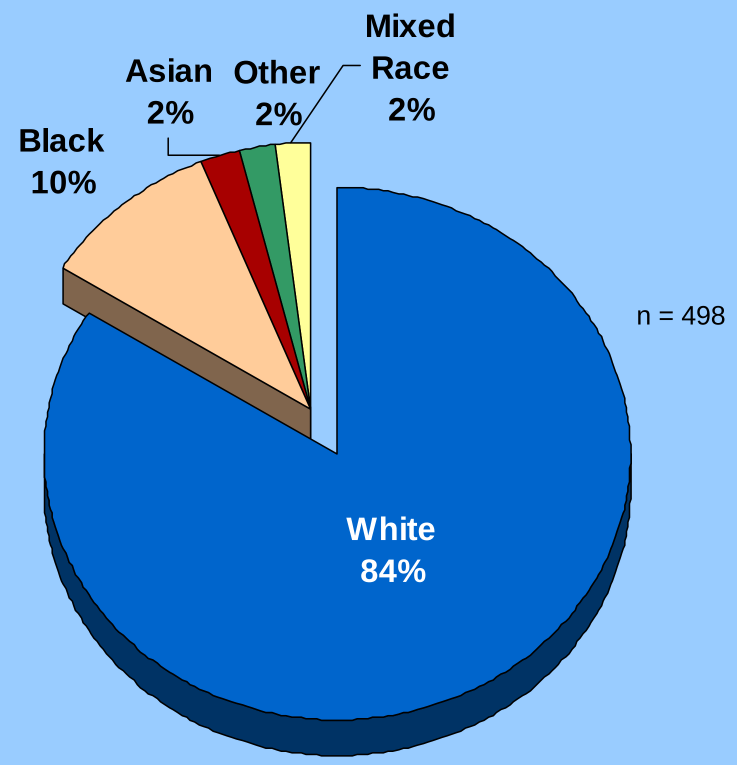
PITTSBURGH DOWNTOWN PARTNERSHIP

GENDER AND RACE

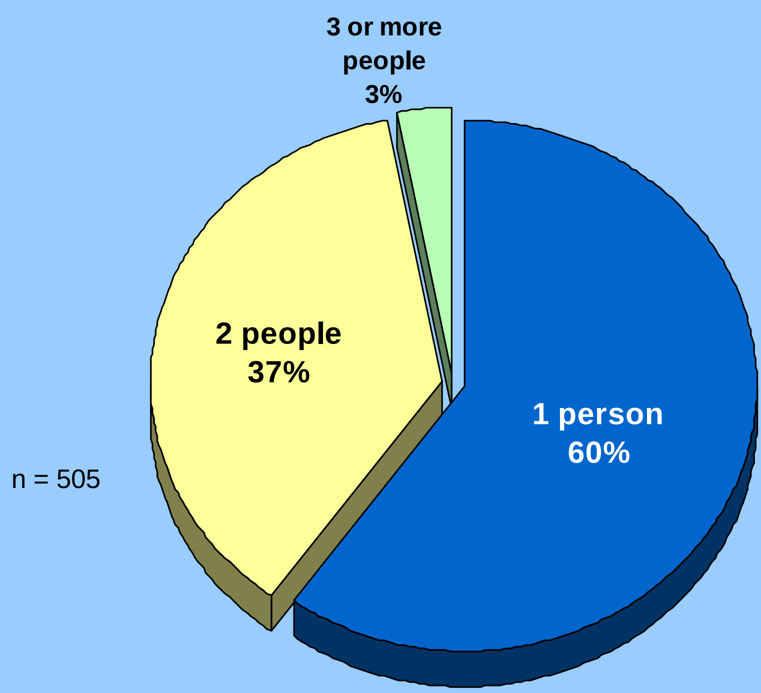


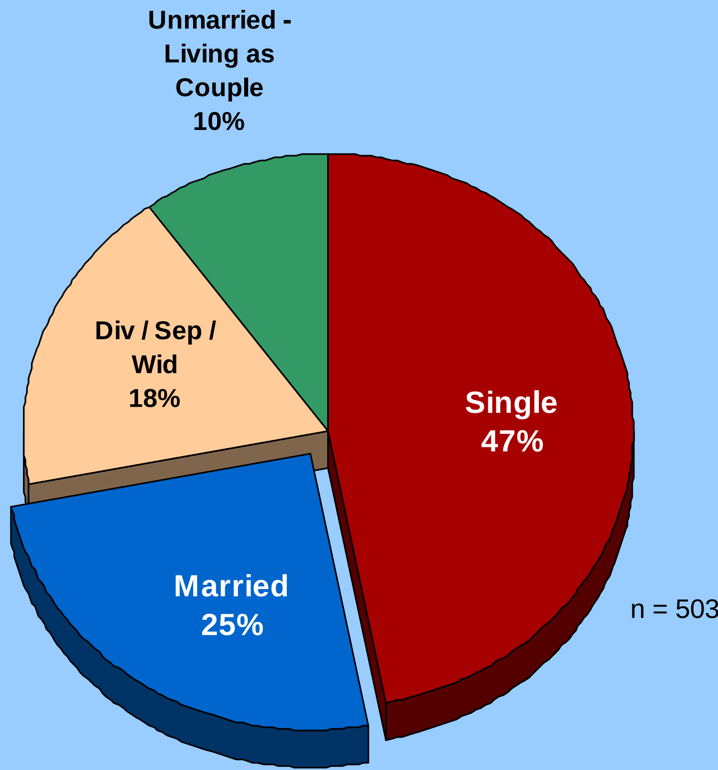


Very similar percentages in both 2008 & 2010 studies

Just 4% consider themselves Latino or Hispanic

HOUSEHOLD SIZE & MARITAL STATUS





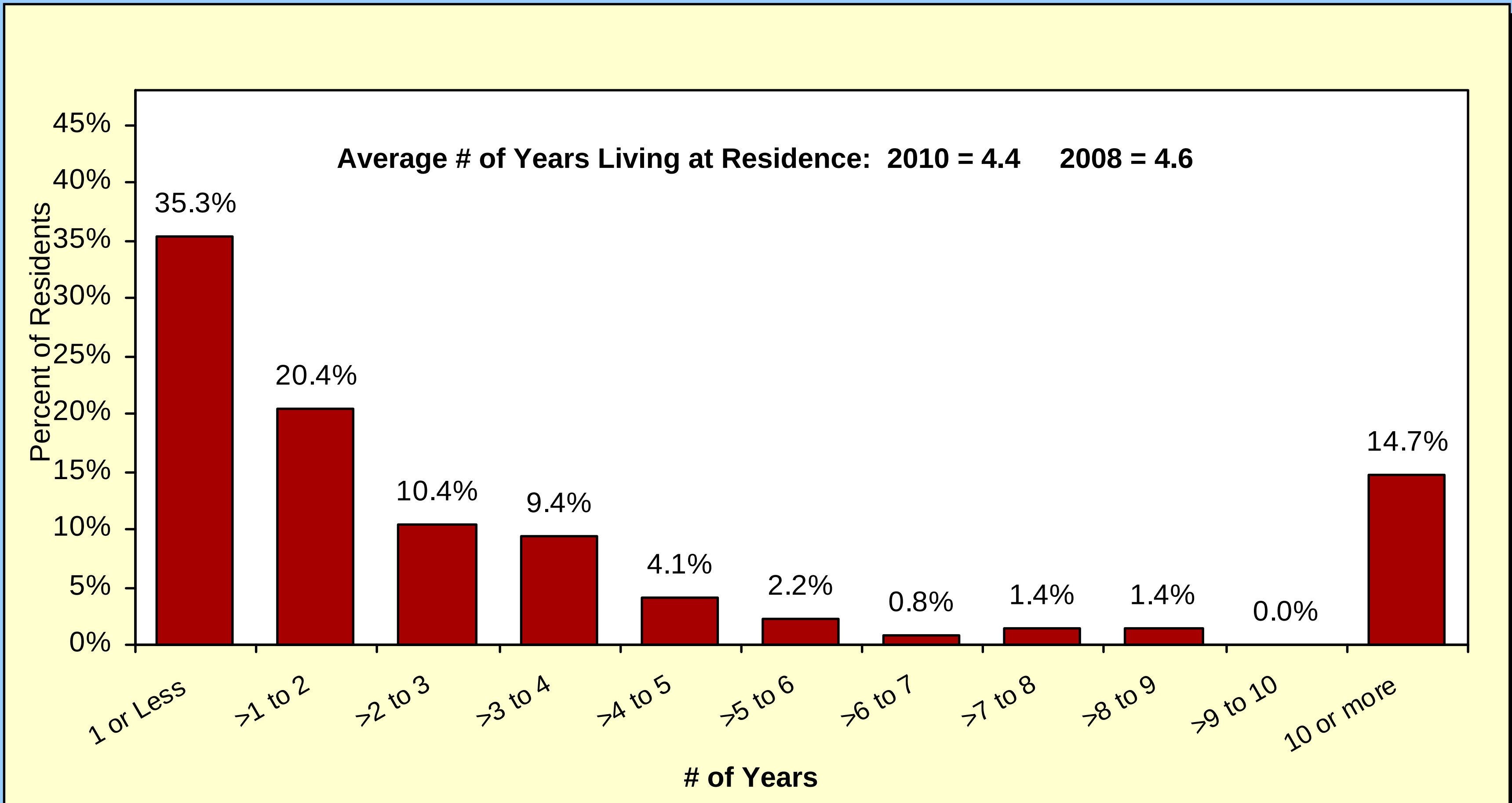
Average Household Size = 1.5 people (1.4 in '08)

Just 4% of households have children (3% in '08)

Very similar percentages as '08 study

TENURE AT DOWNTOWN RESIDENCE

Number of Years Living at Current Residence

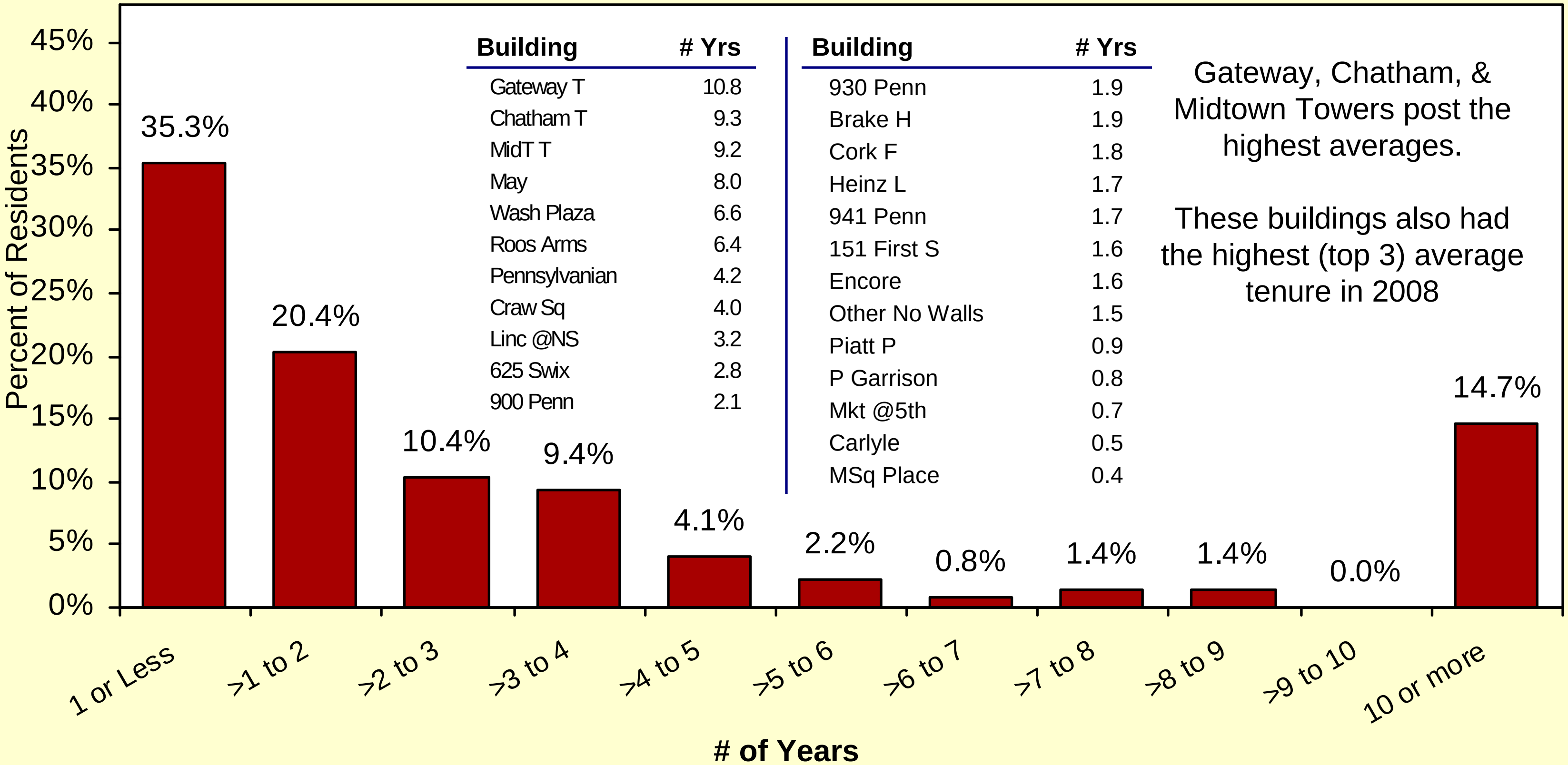


Q1. How long have you lived at your current Downtown residence? (n = 510)

TENURE AT DOWNTOWN RESIDENCE

Number of Years Living at Current Residence

Average # of Years Living at Residence: 2010 = 4.4 2008 = 4.6



Building	# Yrs	Building	# Yrs
Gateway T	10.8	930 Penn	1.9
Chatham T	9.3	Brake H	1.9
MidT T	9.2	Cork F	1.8
May	8.0	Heinz L	1.7
Wash Plaza	6.6	941 Penn	1.7
Roos Arms	6.4	151 First S	1.6
Pennsylvanian	4.2	Encore	1.6
Craw Sq	4.0	Other No Walls	1.5
Linc @NS	3.2	Piatt P	0.9
625 Swix	2.8	P Garrison	0.8
900 Penn	2.1	Mkt @5th	0.7
		Carlyle	0.5
		MSq Place	0.4

Gateway, Chatham, & Midtown Towers post the highest averages.

These buildings also had the highest (top 3) average tenure in 2008

Q1. How long have you lived at your current Downtown residence? (n = 510)

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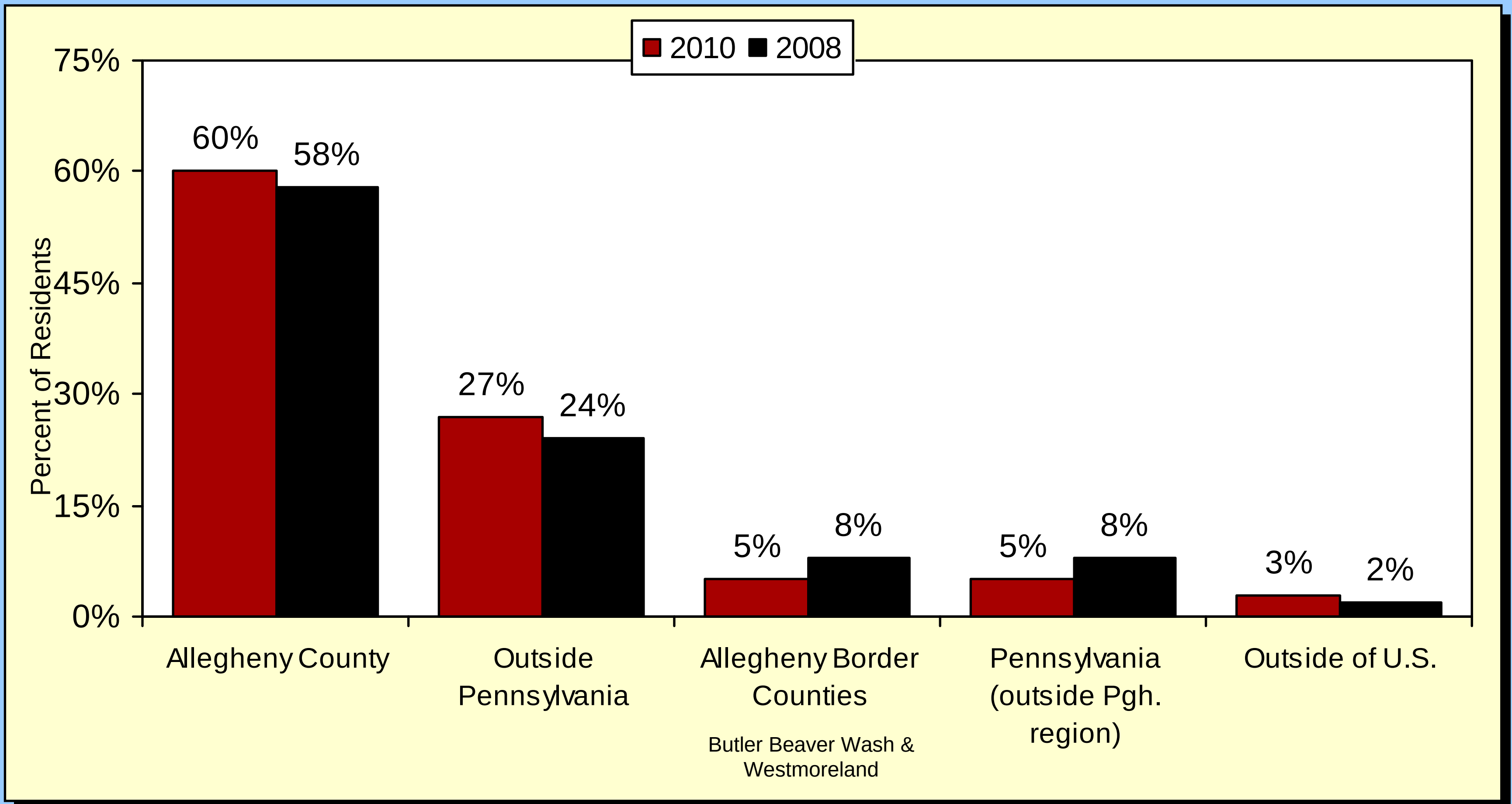
PREVIOUS RESIDENCE

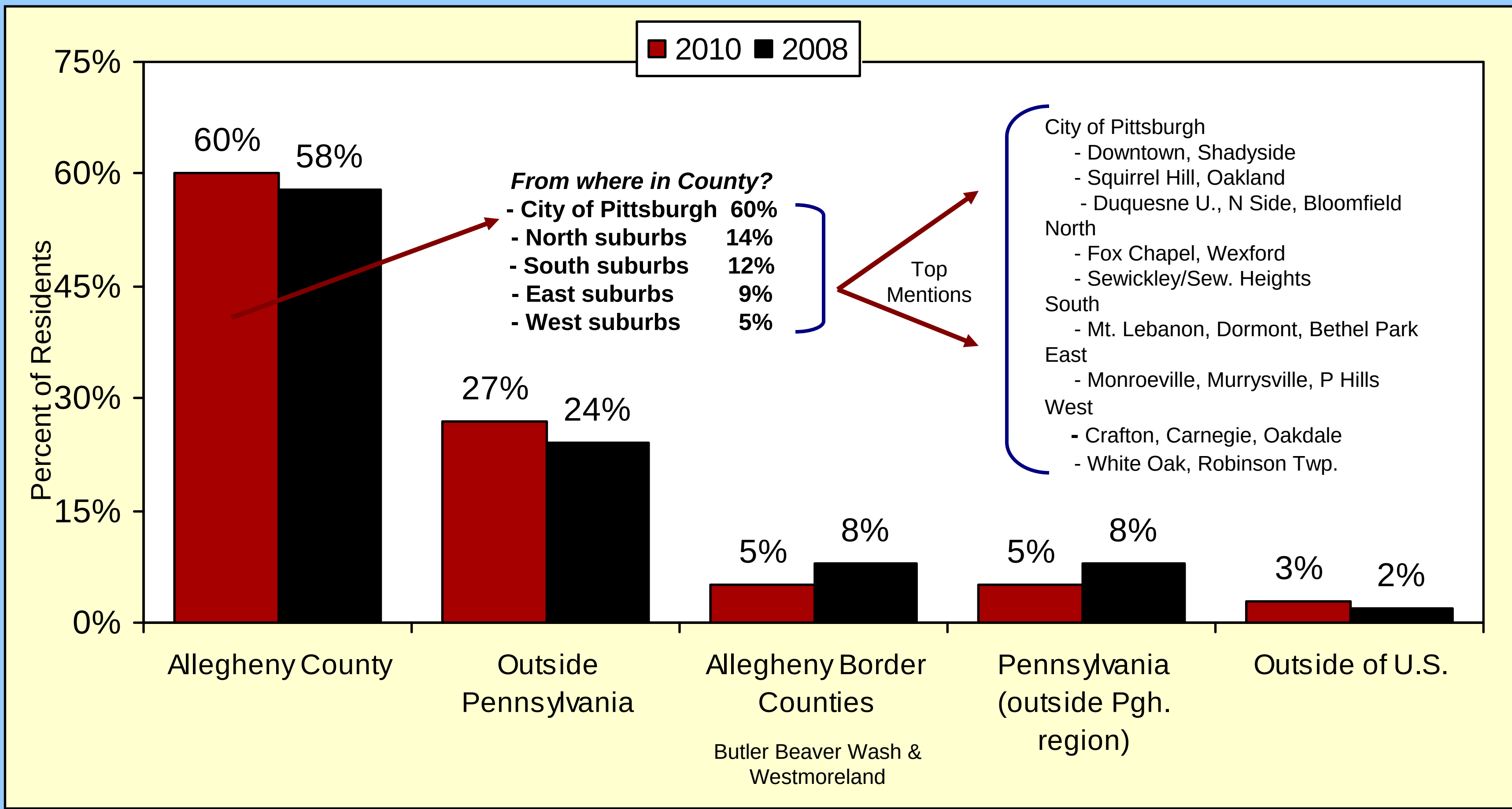
Location of Residence Prior to Moving Downtown



Q2. Where did you last live prior to moving to your current Downtown residence? (n = 509)

PREVIOUS RESIDENCE

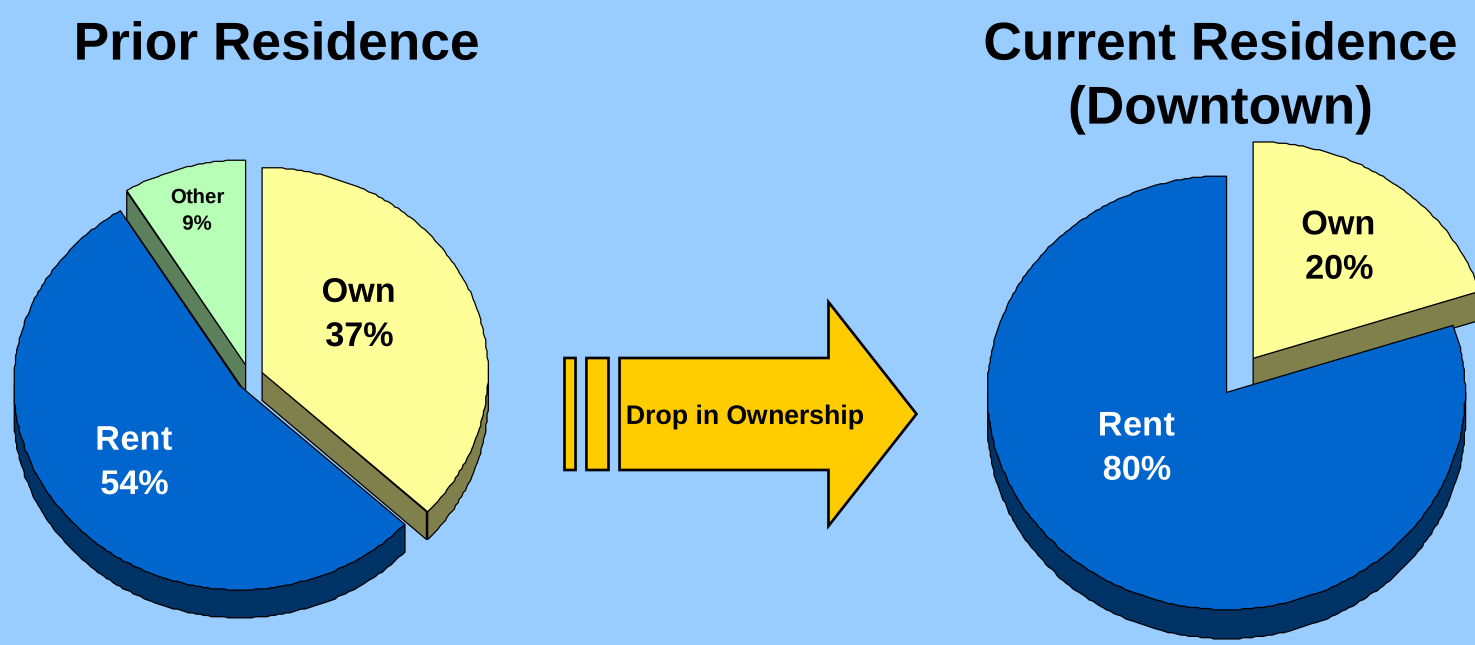
Location of Residence Prior to Moving Downtown



Q2. Where did you last live prior to moving to your current Downtown residence? (n = 509)

OWNERSHIP STATUS

Rent versus Own – Downtown Residence



Similar percentages in ’08:
Own = 22%   Rent = 78%

Q3. Which best describes your status at your prior residence? (n=504)

Q32. Do you own or rent at your current residence? (n=498)

SUMMARY OF SAMPLE DEMOGRAPHICS

GENDER	***2010***	***2008***
Male	**46%**	**44%**
Female	**54%**	**56%**
MARITAL STATUS	***2010***	***2008***
Married	25.2%	26.6%
Single	46.6%	45.5%
Divorced/Widowed/ Separated	18.3%	20.4%
Unmarried living as couple	9.9%	7.5%
RACE/ETHNICITY	***2010***	***2008***
White	**84%**	**83%**
Black	**10%**	**12%**
Asian	**2%**	**2%**
Other	**4%**	**3%**

AGE	***2010***	***2008***
Less than 25	**7%**	**9%**
25 – 29	**19%**	**17%**
30 – 34	**13%**	**9%**
35 – 39	**8%**	**9%**
40 – 44	**5%**	**6%**
45 – 49	**7%**	**5%**
50 – 54	**9%**	**10%**
55 – 59	**8%**	**9%**
60 – 64	**7%**	**7%**
65 – 69	**5%**	**7%**
70 – 74	**4%**	**4%**
75+	**8%**	**8%**
Downtown HH Size	*2010*	*2008*
Average HH size	**1.5 people**	**1.4 people**

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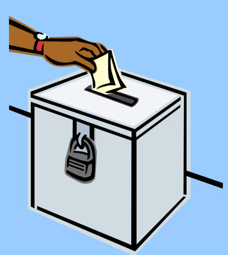
SUMMARY OF SAMPLE DEMOGRAPHICS

INCOME	*2010*	*2008*
<$25K	12%	10%
$25K-$50K	16%	12%
$51K-$75K	16%	18%
$76K-$100K	14%	15%
$101K-$150K	13%	13%
$151K-$200K	6%	4%
$201K-$250K	3%	2%
>$250K	8%	10%
Prefer Not to Say	12%	16%

PET OWNERSHIP	*2010*	*2008*
No Pets	76%	74%
Own Dogs	11%	13%
Own Cats	12%	14%
Own Other Pets	1%	2%
Average # of Dogs	1.1	1.0
Average # of Cats	1.4	1.5
"Other" Types of Pets	Birds, Fish, Rabbits, Hamsters	



VOTING REGISTRATION

- 65% registered in DT district (current DT residence)
- 24% registered at prior (old) residence
- 11% not registered

RESIDENTS' EMPLOYERS

For Whom Do Residents Work?

Employer	Frequency
retired	59
self	37
UPMC	31
PNC	18
University of Pittsburgh	17
unemployed	11
BNY Mellon	6
disabled	6
Duquesne University	5
Carnegie Mellon University	4
Highmark	4
student	4
Westinghouse Electric Co.	4
Allegheny County	3
Deloitte	3
EDMC	3
K&L Gates LLP	3
none	3
PPG Industries	3
Rivers Casino	3
Allegheny General Hospital	2
Children's Hospital	2
City of Pgh	2
Federated Investors	2
Giant Eagle	2
Glaxo Smithkline	2
GNC	2
Heinz	2

Employer	Frequency
Huntington Bank	2
Macy's	2
Reed Smith LLP	2
Tiffany & Co.	2
A. J. Silberman Co.	1
AIUB	1
Alcoa	1
Allegheny Ludlum	1
Allegheny Technologies (ATI)	1
Alphagraphics (owner)	1
American Bridge Co.	1
American Dispatch	1
American Eagle Outfitters	1
American Heart Assoc.	1
Amore Management	1
Anglican Diocese of Pgh	1
Aquatemp Global of Virginia	1
Aramark	1
Ariba	1
arPR, inc and Knowledge In A Nutshell	1
AT&T	1
Atlantic Engineering Services	1
Babst, Calland, Clements and Zomnir, P.C.	1
BASF Corp.	1
Bayer Material Science	1
Beacon Roofing Supply	1
Bella Sera	1

Employer	Frequency
Blumling & Gesky, LLP	1
Body Media	1
Boss Models (NYC)	1
Boston Scientific	1
Brooks Diamonds	1
Brothers Property Mgmt	1
Brueggers Bagels	1
Brunswick Boat Group/Land N Sea	1
Caarmeuse Lime & Stone	1
Cache Inc.	1
Capco	1
Carnegie Library	1
Catalyst Connection	1
Caterpillar	1
CBS Radio	1
CCAC	1
Celli-Flynn Brennan Architects	1
CH2M Hill	1
CHS/PNC Park	1
Cigna Healtlhcare	1
Cisco	1
Clearfield Co. Homemakers	1
CNG Services Int'l	1
Cohen & Grigsby, P.C.	1
Colonial Life Insurance	1
Cox	1
DDI	1
Dept of Defense	1

Q36. For whom do you work? (n= 403)

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PITTSBURGH DOWNTOWN PARTNERSHIP

RESIDENTS' EMPLOYERS

For Whom Do Residents Work?

Employer	Frequency
Dick's Sporting Goods	1
Direct Energy	1
Dollar Bank FSB	1
Dr. Sean Nolan	1
Draeger, Inc.	1
Eckert Seamans	1
Educational Institution	1
Energy Products	1
Environmental Planning & Design LLC	1
EQT Corp	1
Euro RSCG Worldwide PR	1
Excela Health	1
EXCO Resources (PA), Inc.	1
Fairmont Hotels	1
Famous Enterprises	1
Federal Gov't	1
First Lutheran Church	1
Four Kings Flowers	1
GNC Corp HQ	1
GSK	1
HACP	1
Hearst Corp.	1
Herbein & Co Inc.	1
Holden Corporation	1
Holiday Inn	1
Houston Harbaugh	1
ING - work from home	1
J&J	1

Employer	Frequency
Jones Day	1
Keller Williams Real Estate	1
Keystone Oaks School District	1
KPMG	1
Kurt J. Lesker Company/EDMC	1
Lacoste and McFadden's	1
Landstar Global Logistics (Augusta, Ga.)	1
law firm	1
Levy Restaurants	1
Liberty Mutual	1
Malin, Bergquist & Co, LLP	1
MARC USA / ad agency	1
McCormack Baron Ragan	1
McKeesport School District	1
Merck, Sharp & Dohme Corp	1
Mercy	1
Minute Clinic/CVS	1
Myasthenia Gravis Assoc of WPA	1
Nakama Japanese Steakhouse	1
New City Marketing	1
Northwood Realty Services	1
Ohio Valley General Hospital	1
Omnyx	1
Panasas Inc	1
PDP, Block by Block	1
Pgh Glassworks LLC	1
Pgh Musical Theatre	1

Employer	Frequency
Pgh Pirates, Red Bull, Ross Park Mall, Serendipity	1
Pgh Police Dept	1
Pgh Post Gazette	1
PHH Corporation	1
Philips	1
physical therapy co.	1
Pitt Chemical	1
Pittsburgh Penguins	1
Pittsburgh Pirates, LLP	1
Remax Select Realty	1
Renaissance III 2000, Inc.	1
Renegade Services	1
Republic Airways, Indianapolis	1
Rite Aid and the Duquesne Club	1
Roy A Hunt Foundation	1
Saks Fifth Avenue	1
Seneca Valley School District	1
Seton-LaSalle High School	1
Seviche	1
Siemens	1
Smallman St. Deli (Sq. Hill)	1
Srs of St Francis	1
Staley Capital	1
Starbucks	1
Starbucks & levelinteractive	1
Starwood Corp	1
Strategic Advisors (Southpointe)	1

Q36. For whom do you work? (n= 403)

RESIDENTS' EMPLOYERS

For Whom Do Residents Work?

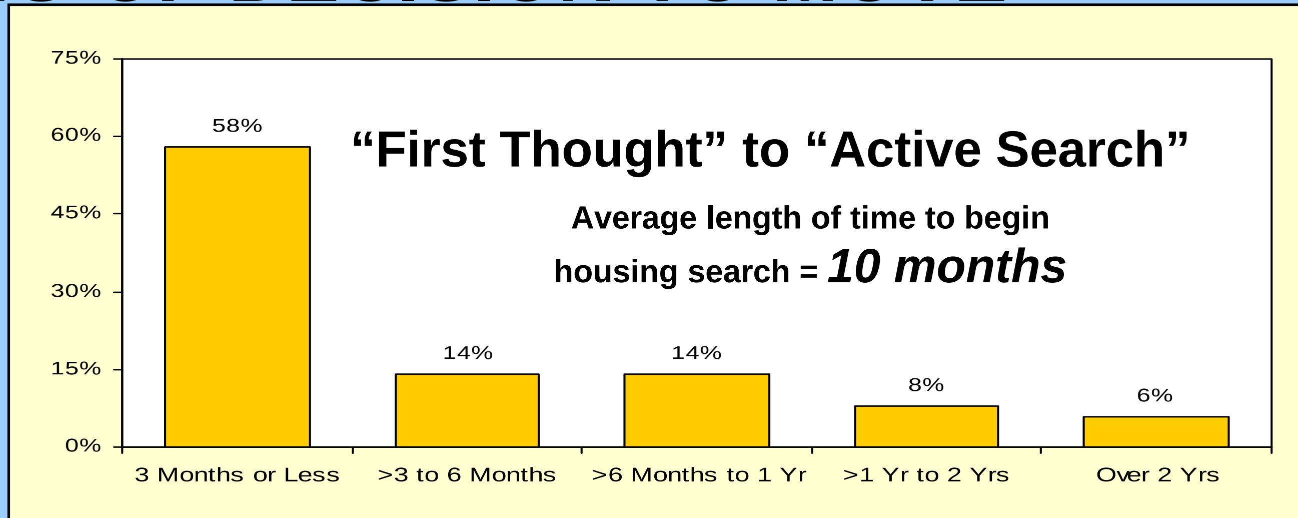
Employer	Frequency
TEKSystems	1
The Hill House	1
The Mr. John Co.	1
The Watson Institute	1
TIAA-Cref	1
TJ Maxx	1
US Airways	1
US Army	1
US Bankruptcy Court for W.D. Pa.	1
US Dept of Energy	1
US Steel	1
VA Hospital	1
Veolia Water Solutions & Technology	1
Visionworks	1
Walgreens	1
Wells Fargo Advisors	1
West Penn Hospital	1
Western PA School for Blind Children	1
Whitaker Corp	1
Worley Parsons	1
WTAE-TV	1
YWCA	1

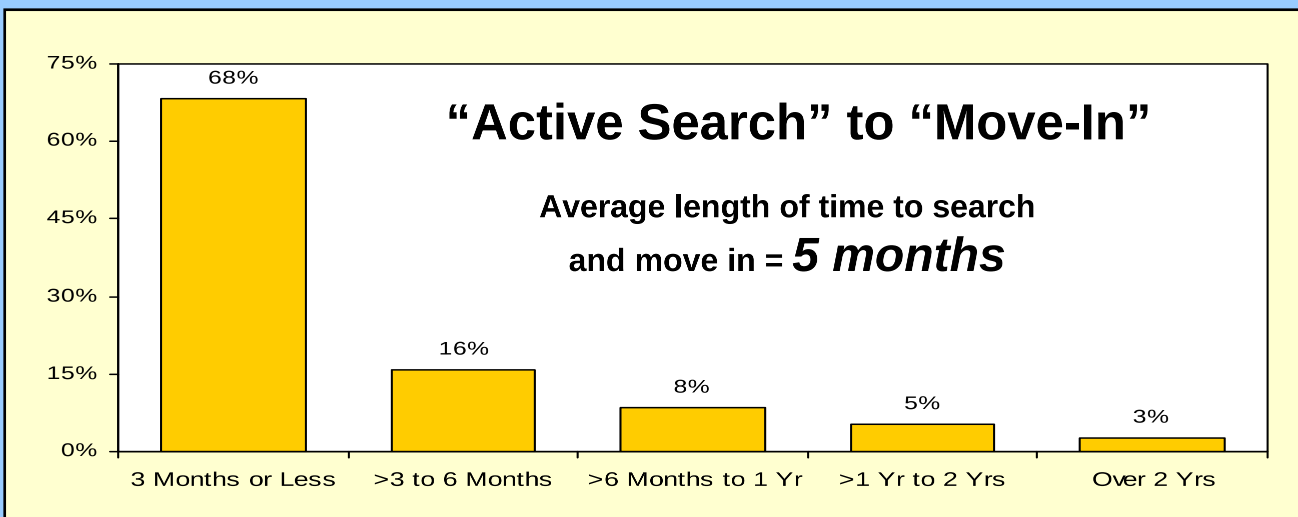
Q36. For whom do you work? (n= 403)

DECISION TO MOVE DOWNTOWN

TIMING OF DECISION TO MOVE

Q5a. How long did it take from your first thought of moving DT to actively searching for a DT residence? (n = 434)





Q5b. How long did it take from the start of your active DT housing search to moving into your DT residence? (n = 440)

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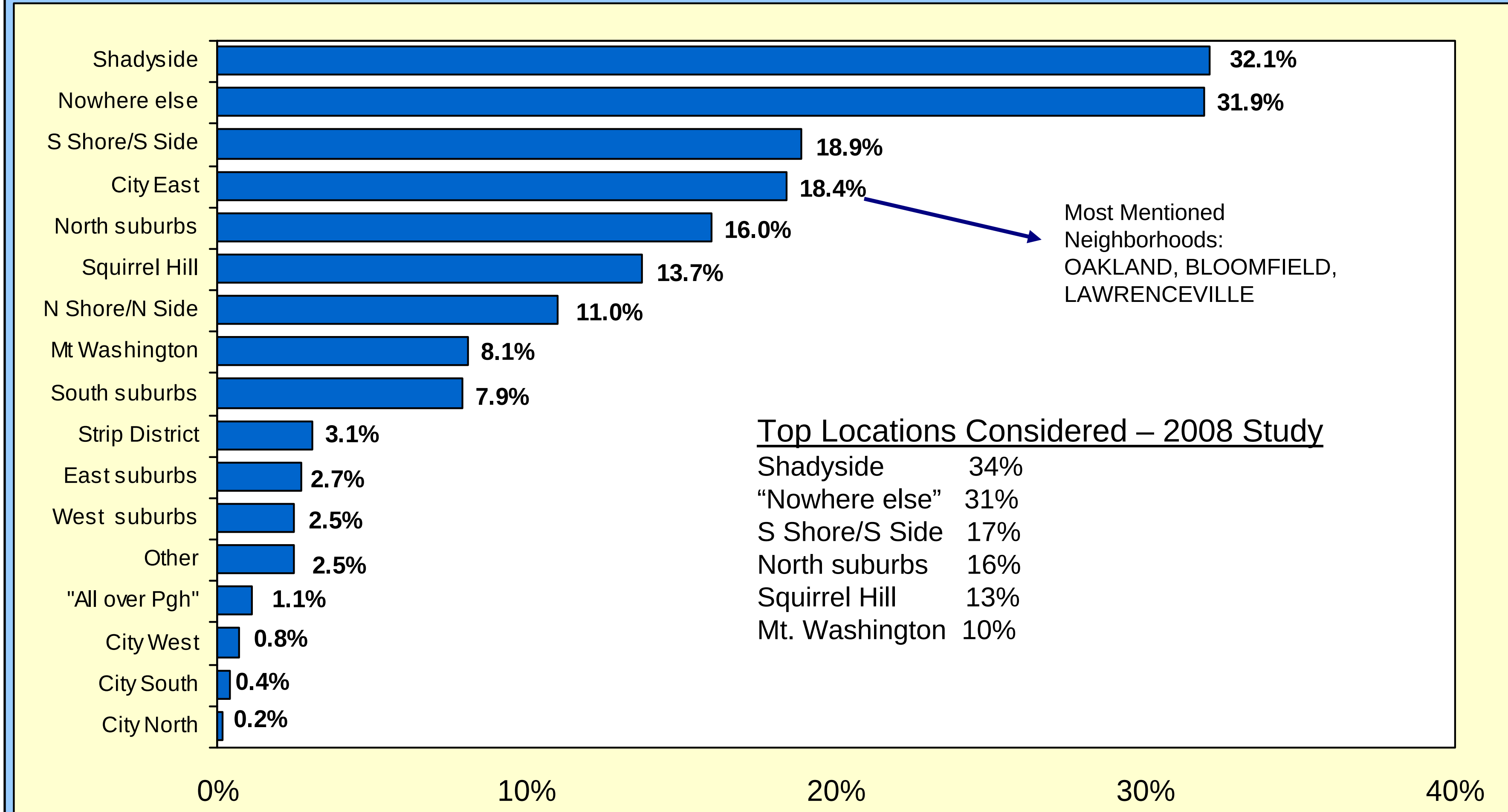
OTHER LOCATIONS CONSIDERED IN HOUSING SEARCH



Q6. Prior to moving Downtown, what communities were included in your housing search? (n=445)

Q6 is a multiple response question. 445 people provided 765 answers. The above chart reflects the % of people mentioning each location.

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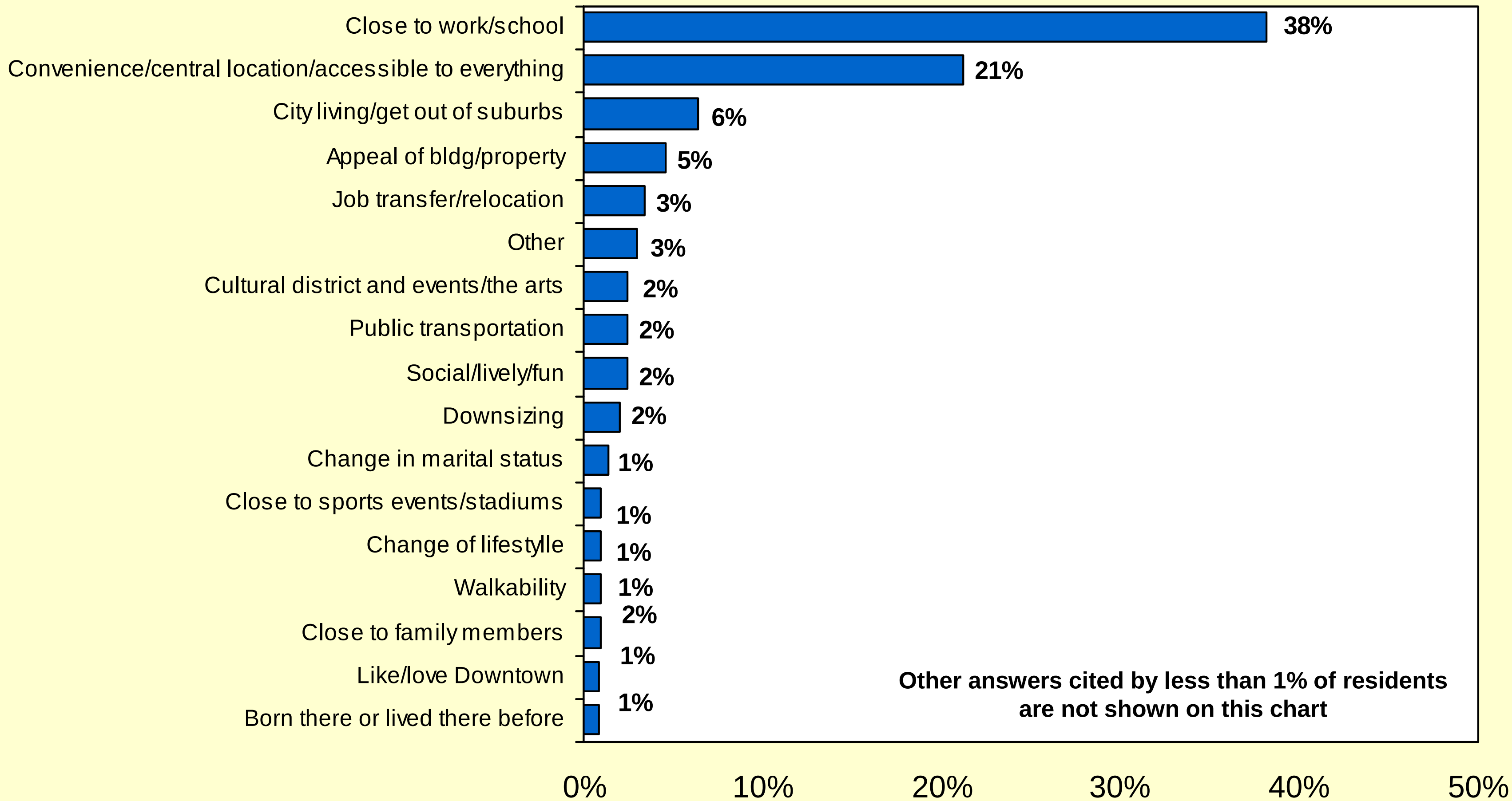
PITTSBURGH DOWNTOWN PARTNERSHIP

PRIMARY REASON FOR MOVING DOWNTOWN



Q4. What was the primary reason you chose to live Downtown? (n=500)

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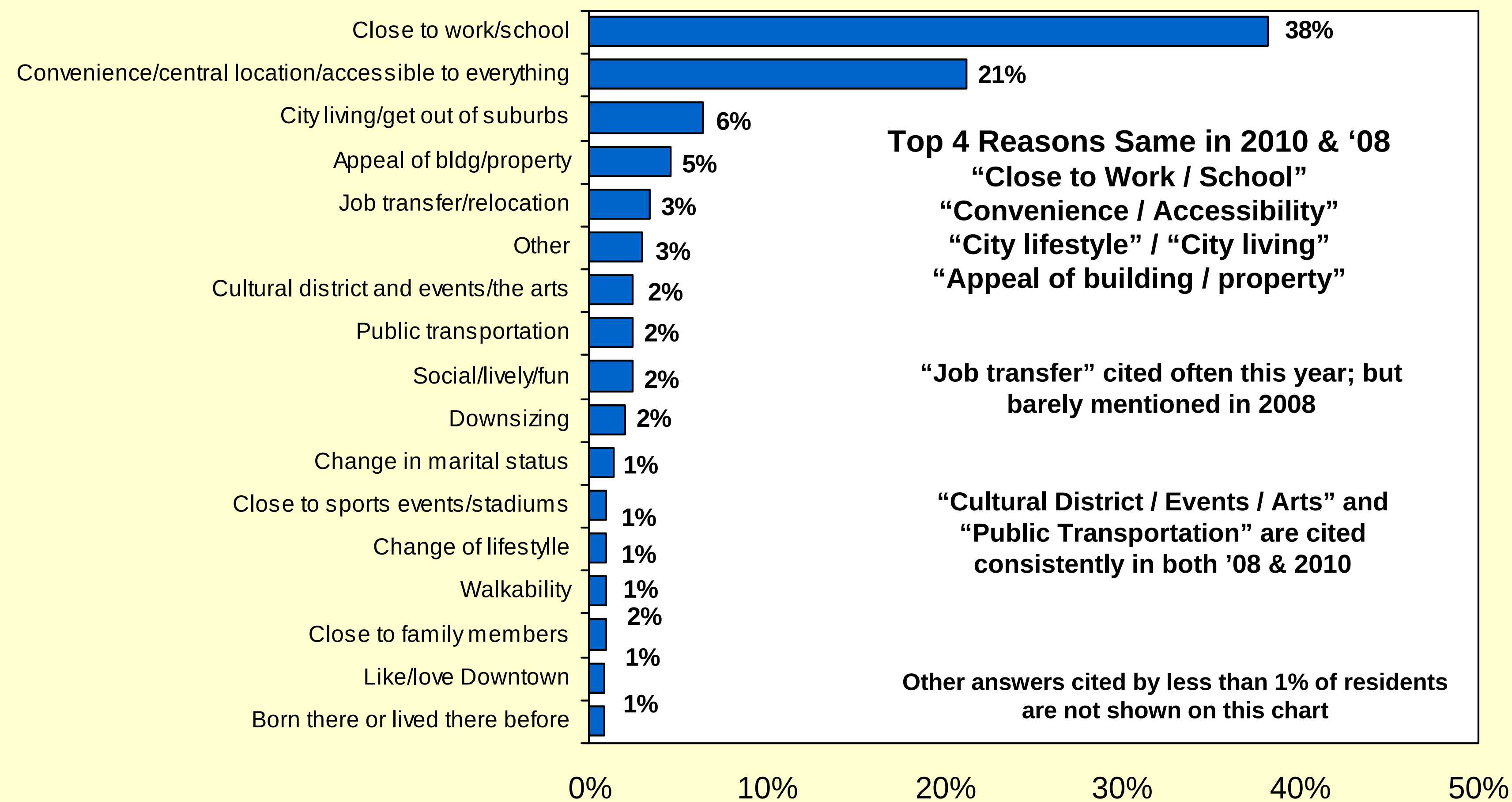
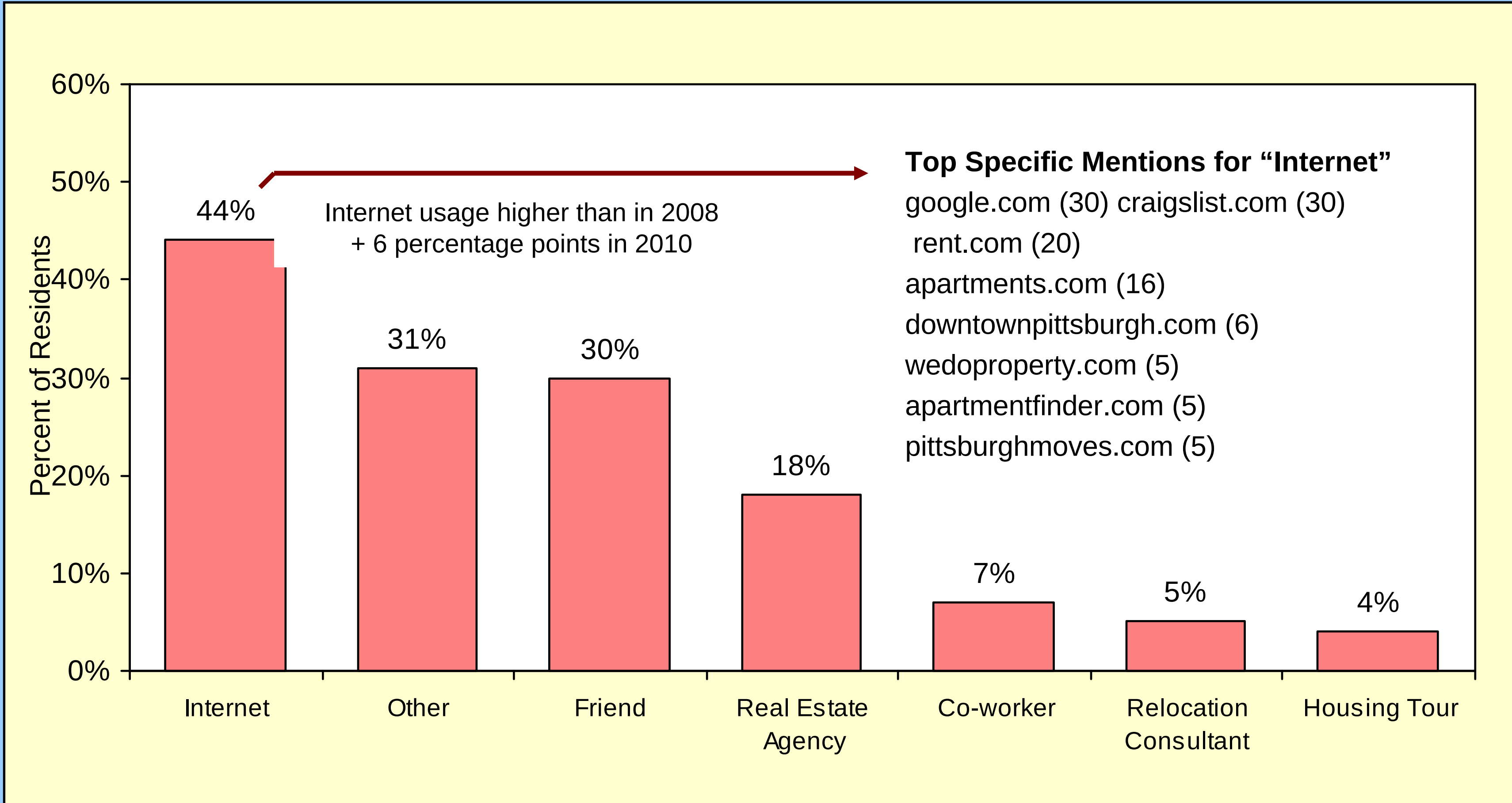
PITTSBURGH DOWNTOWN PARTNERSHIP

PRIMARY REASON FOR MOVING DOWNTOWN



Q4. What was the primary reason you chose to live Downtown? (n=500)

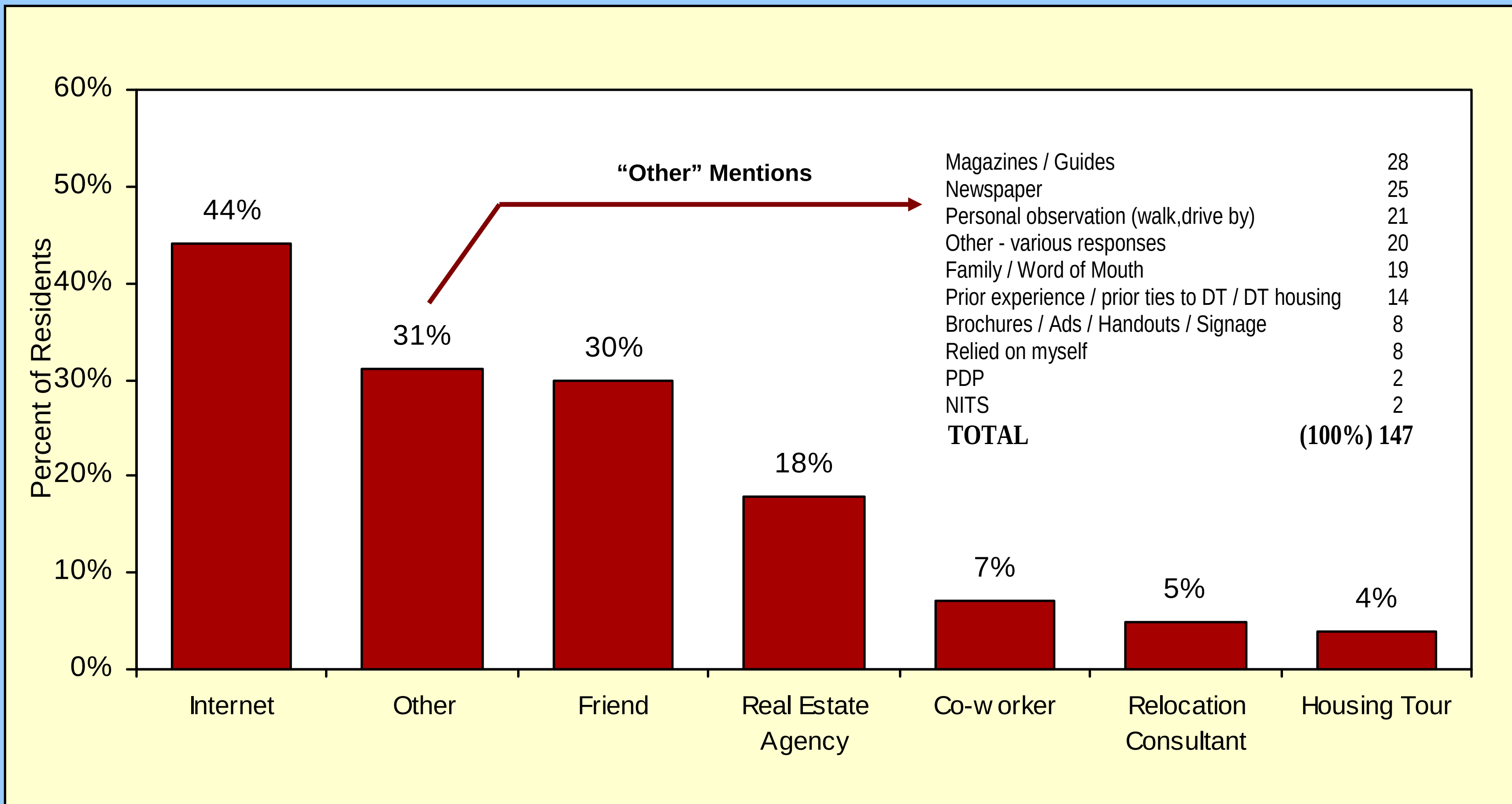
RESOURCES USED IN HOUSING SEARCH



Q7. Which resources did you use to find your current building? (n = 498)

Q7 is a multiple response question. 498 people provided 682 answers. The above chart reflects the % of people mentioning each resource.

RESOURCES USED IN HOUSING SEARCH



Q7. Which resources did you use to find your current building? (n = 498)

Q7 is a multiple response question. 498 people provided 682 answers. The above chart reflects the % of people mentioning each resource, hence the total is > 100%

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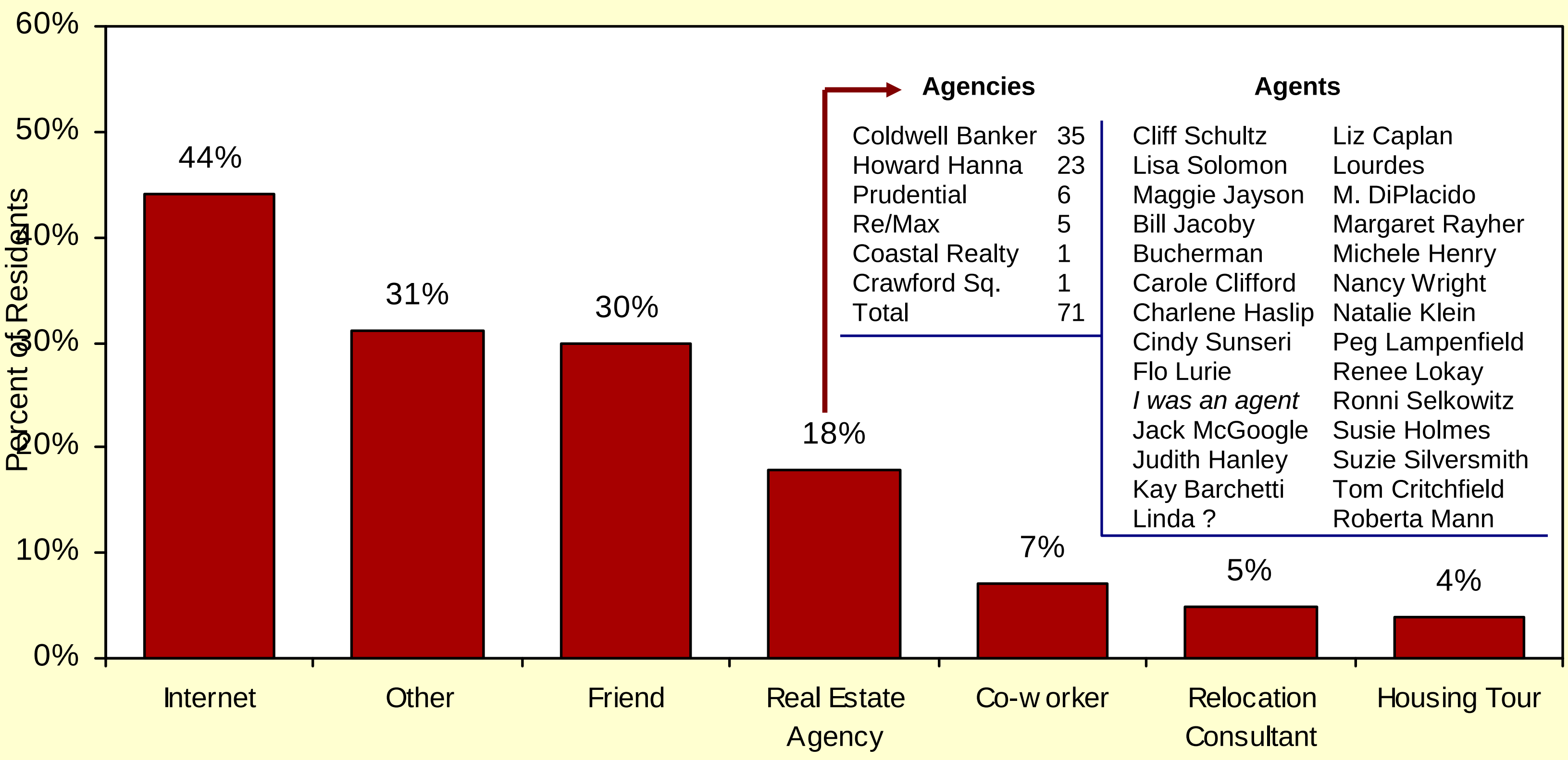
PITTSBURGH DOWNTOWN PARTNERSHIP

RESOURCES USED IN HOUSING SEARCH



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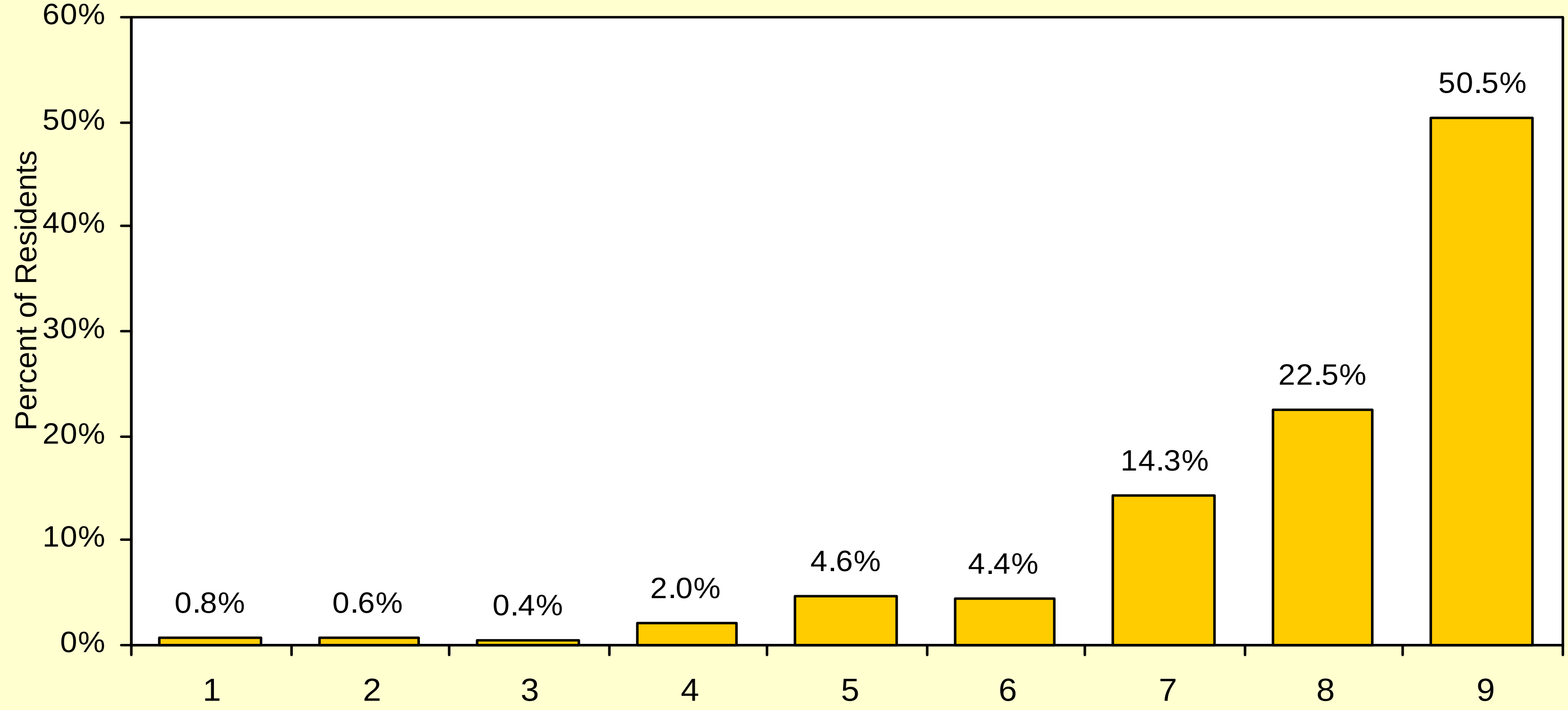
SATISFACTION WITH DOWNTOWN LIVING

SATISFACTION WITH DECISION TO LIVE IN DOWNTOWN

1 = Not satisfied at all; 9 = Very satisfied



Q9. How satisfied are you with your decision to live in Downtown? (n = 503)

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PITTSBURGH DOWNTOWN PARTNERSHIP

SATISFACTION WITH DECISION TO LIVE IN DOWNTOWN

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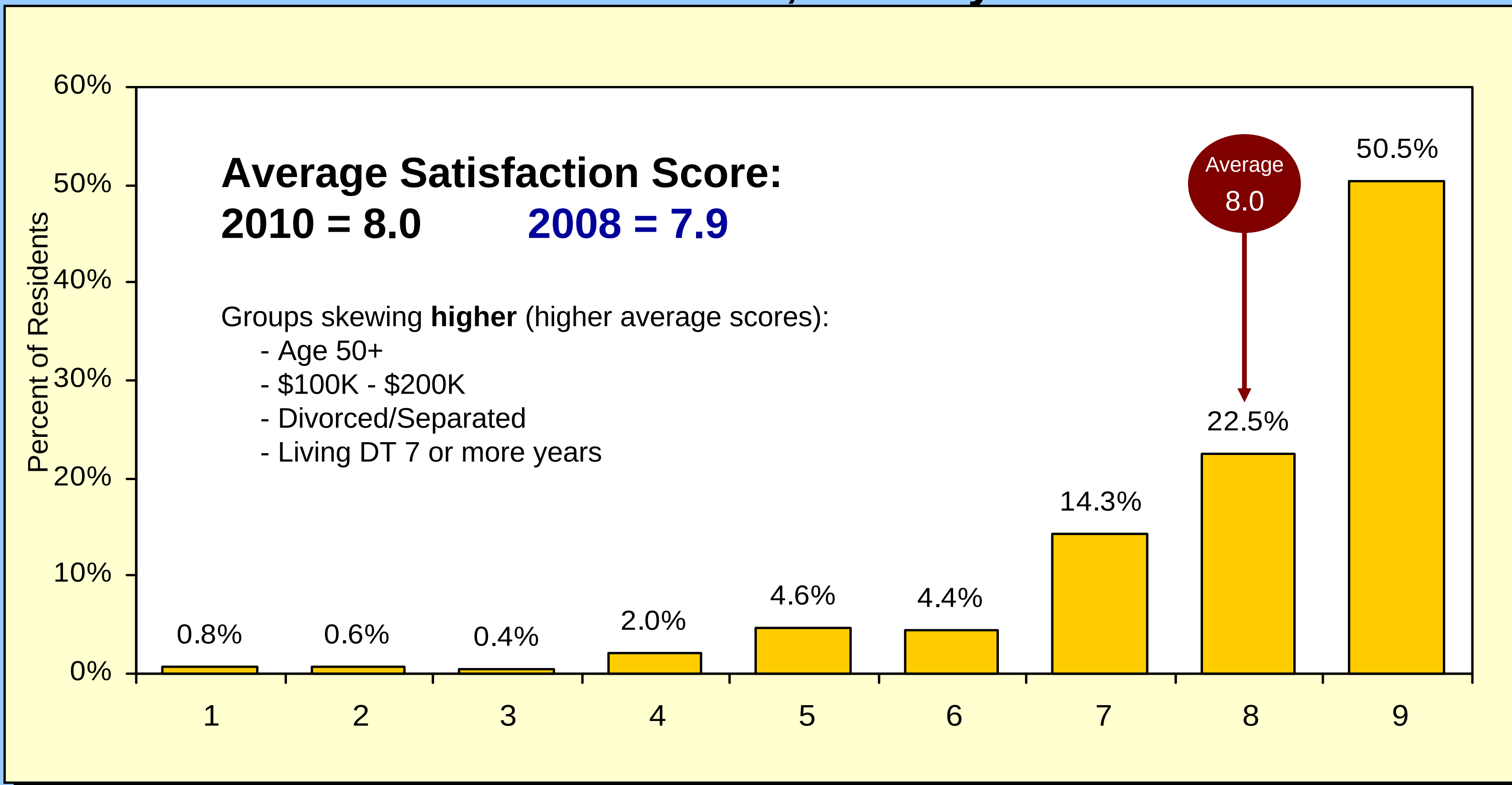

Q9. How satisfied are you with your decision to live in Downtown? (n = 503)

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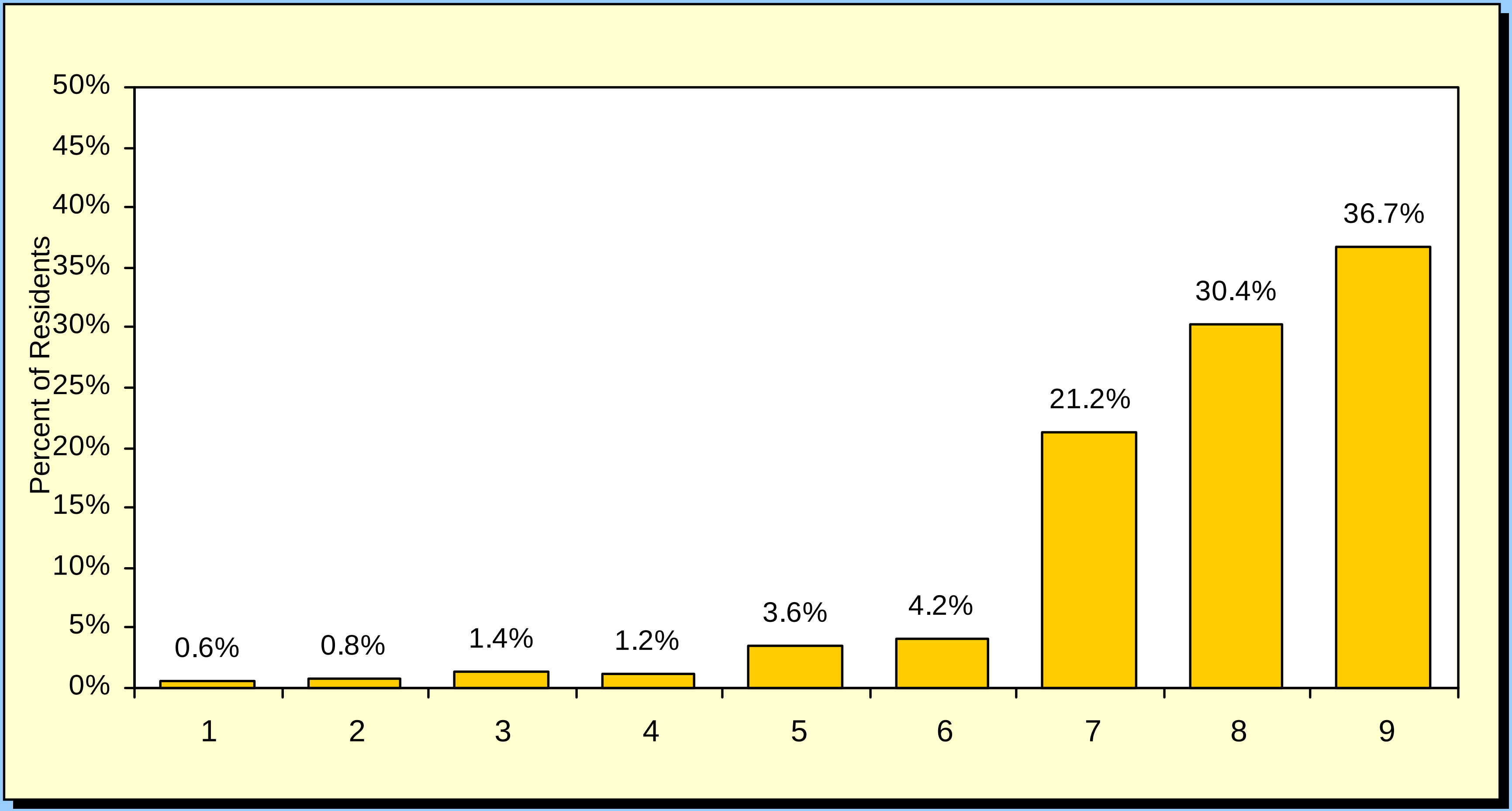
PITTSBURGH DOWNTOWN PARTNERSHIP

SATISFACTION WITH DT BUILDING / PROPERTY

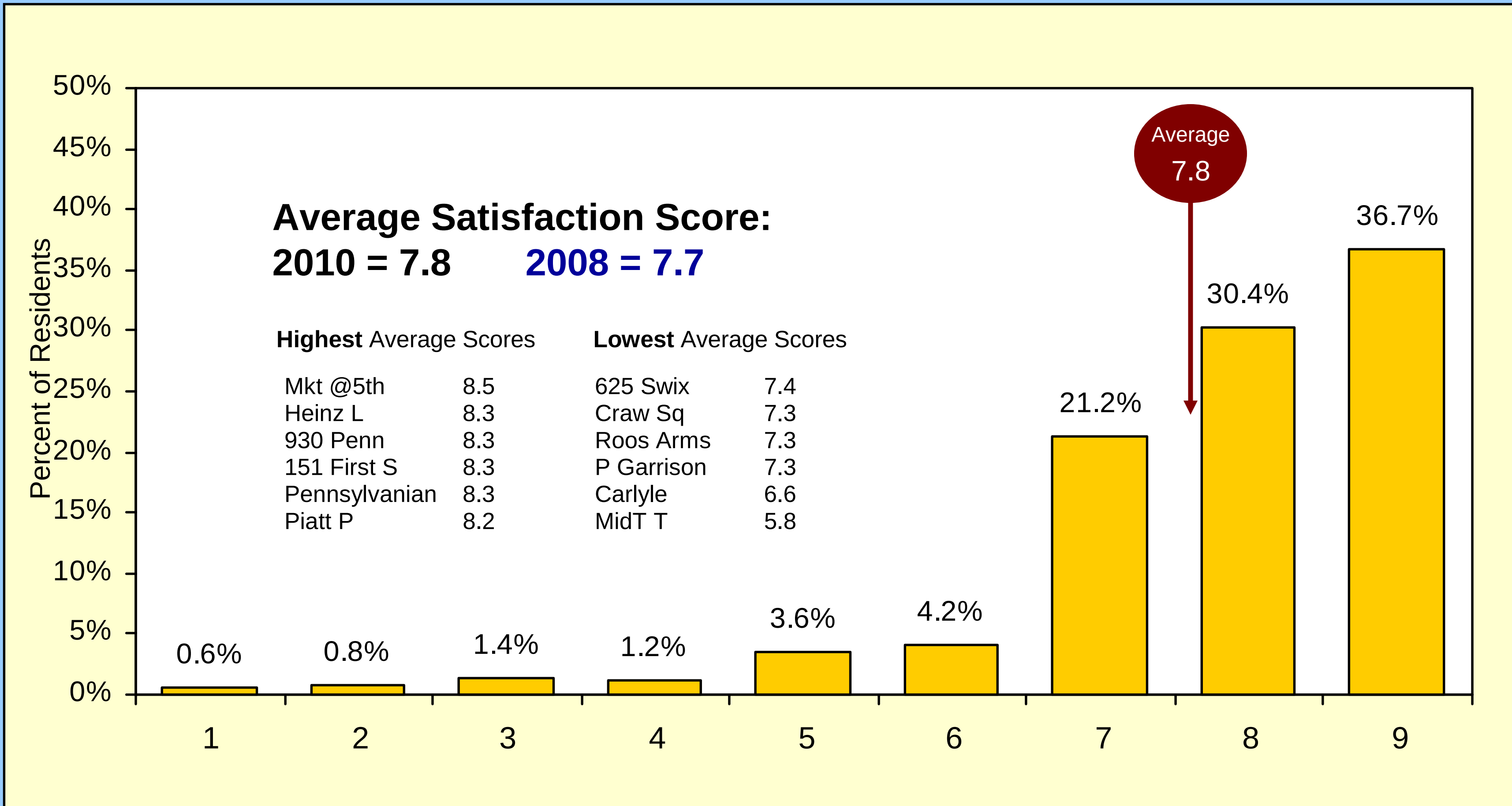
1 = Not satisfied at all; 9 = Very satisfied



Q8. How satisfied are you with your property/building choice? (n = 504)

SATISFACTION WITH DT BUILDING / PROPERTY

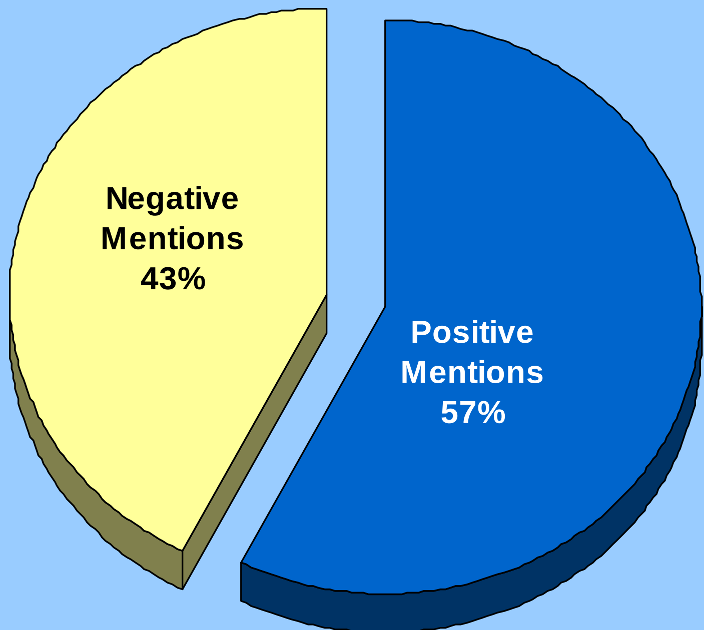
1 = Not satisfied at all; 9 = Very satisfied



Q8. How satisfied are you with your property/building choice? (n = 504)

FACTORS THAT IMPACT THE QUALITY OF "DOWNTOWN LIVING"

Positive & Negative Factors Cited by Residents



2,066 "quality of life" factors were cited by the Downtown residents. 1,187 or 53% of these answers were "positive" or favorable. 43% (879) of the factors reference "negative" or unfavorable issues.

Positive Factors Cited Most Often:
- Close to work or school
- Convenience / central location
- Access to restaurants

Negative Factors Cited Most Often:
- No grocery stores
- Businesses close too early / closed weekends
- Traffic (vehicles)

Q10. Which aspects of Downtown living have the greatest overall impact on your quality of life (livability) as a Downtown resident? (n = 478)

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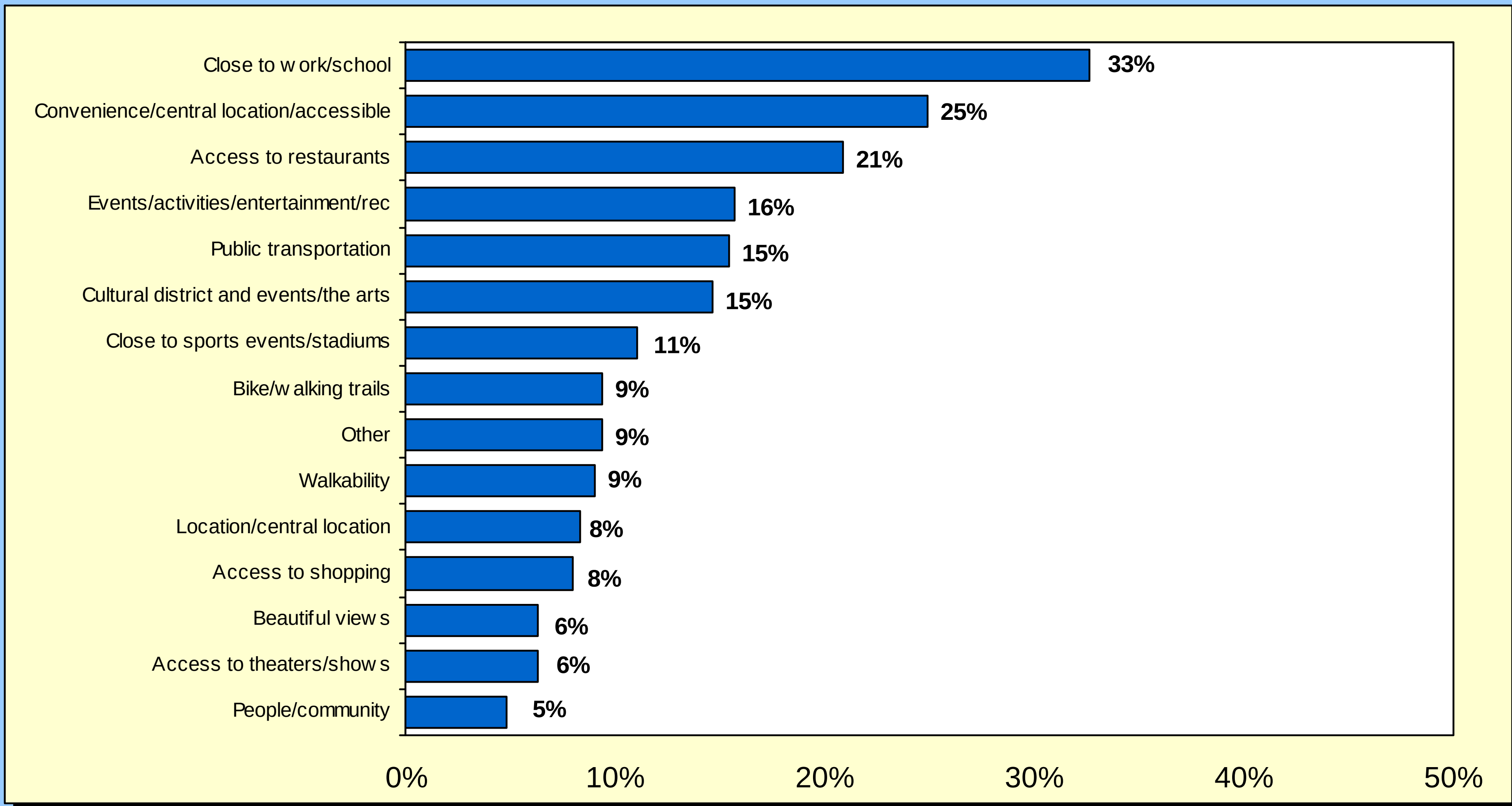
PITTSBURGH DOWNTOWN PARTNERSHIP

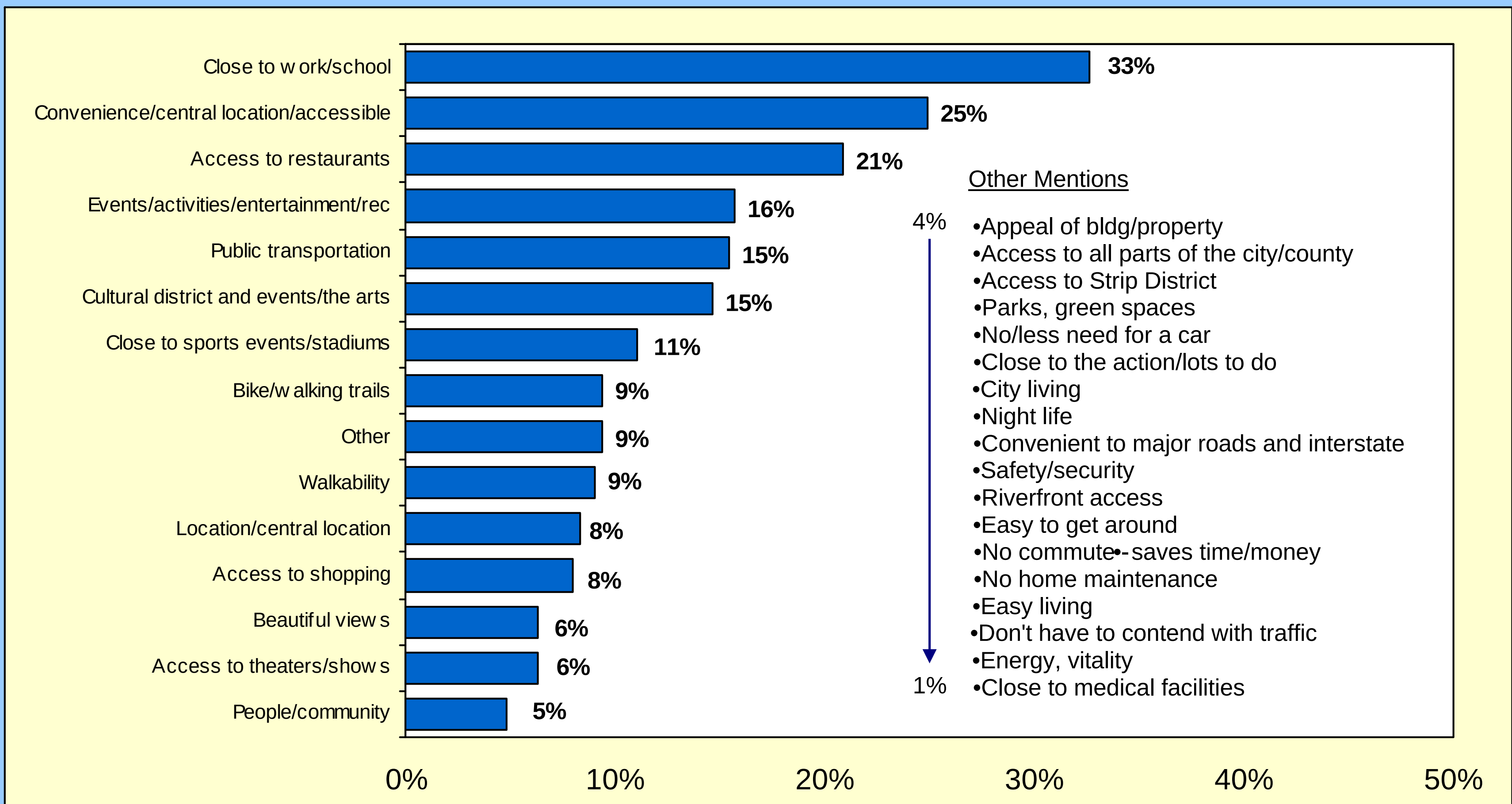
POSITIVE FACTORS IMPACTING THE QUALITY OF "DOWNTOWN LIVING"



Q10. Which aspects of Downtown living have the greatest overall impact on your quality of life (livability) as a Downtown resident? (n = 1,187 responses)

Q10 is a multiple response question. 478 people provided 1,187 answers. The above chart reflects the % of people mentioning each factor.

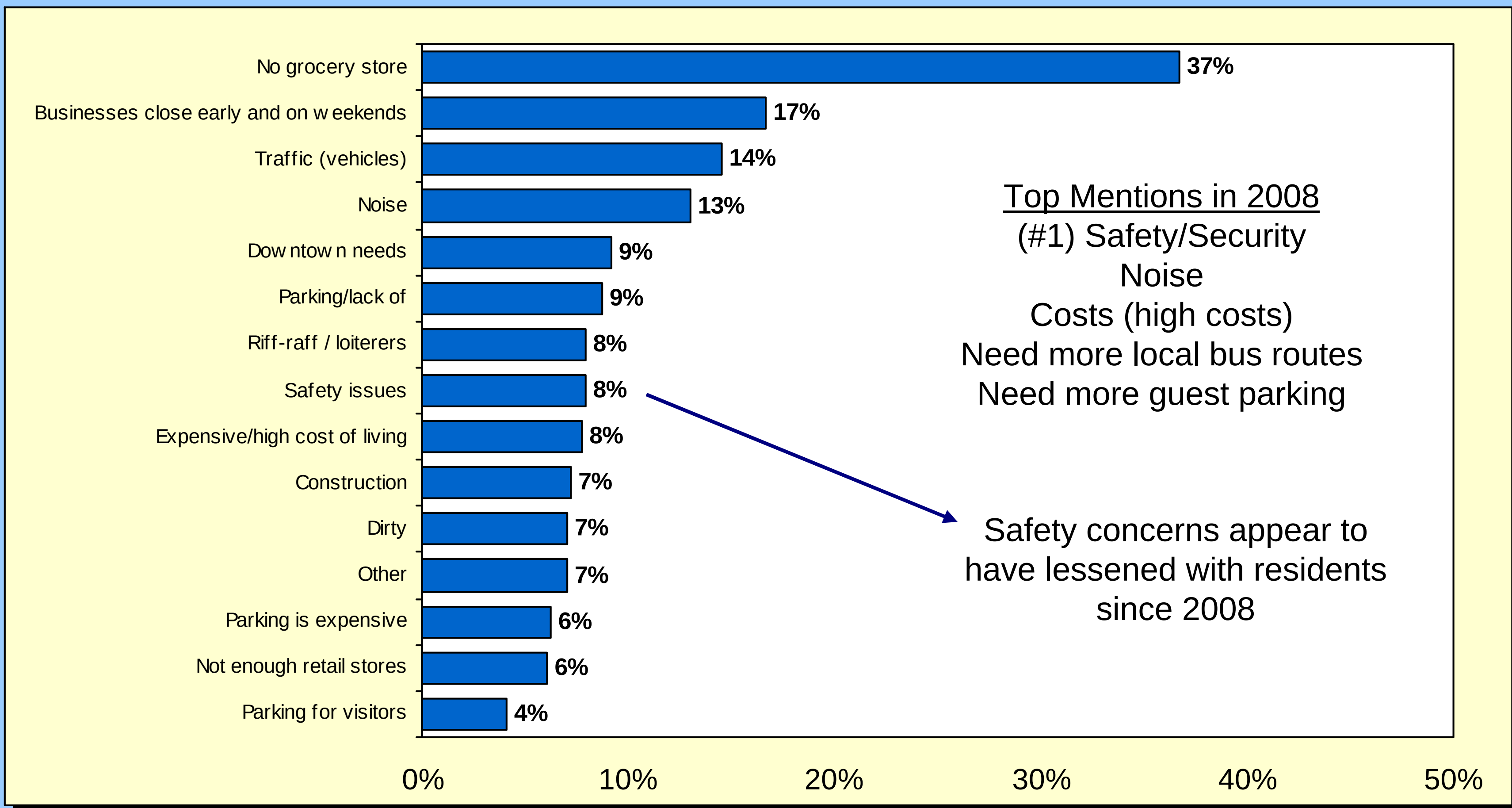
POSITIVE FACTORS IMPACTING THE QUALITY OF "DOWNTOWN LIVING"



Q10. Which aspects of Downtown living have the greatest overall impact on your quality of life (livability) as a Downtown resident? (n = 478)

Q10 is a multiple response question. 478 people provided 1,187 answers. The above chart reflects the % of people mentioning each factor.

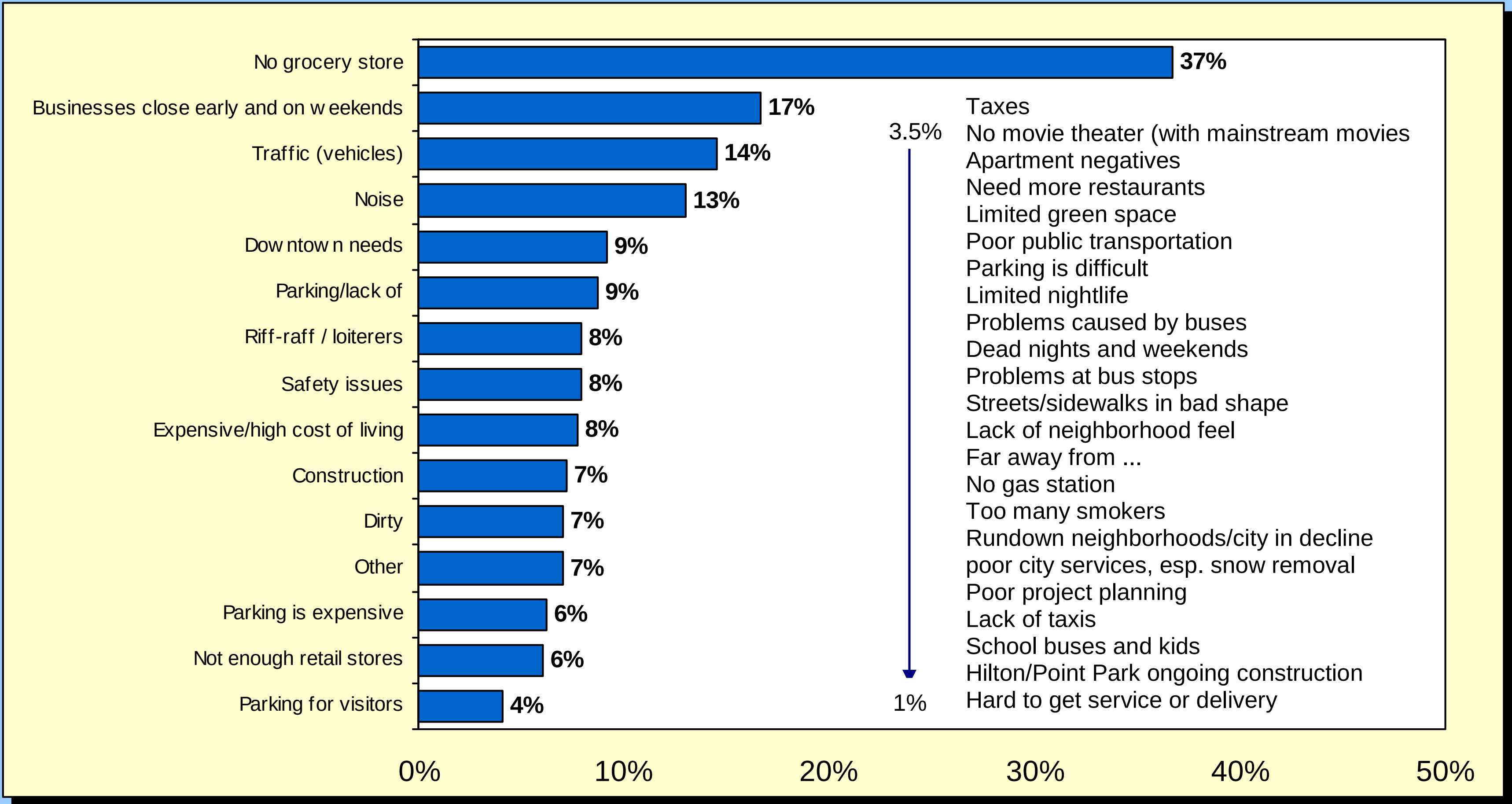
NEGATIVE FACTORS IMPACTING THE QUALITY OF "DOWNTOWN LIVING"



Q10. Which aspects of Downtown living have the greatest overall impact on your quality of life (livability) as a Downtown resident? (n = 414)

Q10 is a multiple response question. 414 people provided 879 answers. The above chart reflects the % of people mentioning each factor.

NEGATIVE FACTORS IMPACTING THE QUALITY OF "DOWNTOWN LIVING"



Q10. Which aspects of Downtown living have the greatest overall impact on your quality of life (livability) as a Downtown resident? (n = 414)

Q10 is a multiple response question. 414 people provided 879 answers. The above chart reflects the % of people mentioning each factor.

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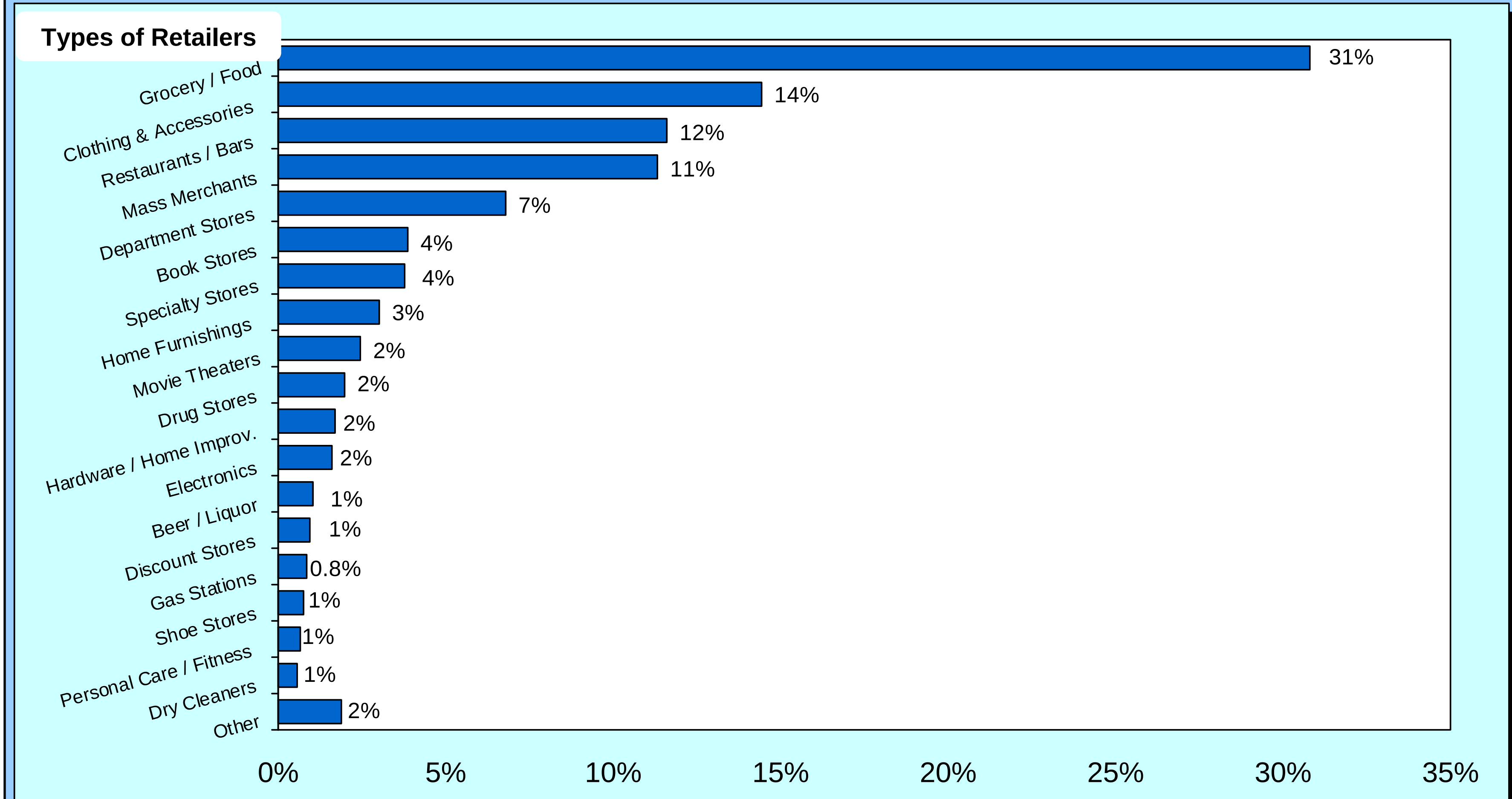
PITTSBURGH DOWNTOWN PARTNERSHIP

RETAILERS

&

GROCERY STORES

RETAILERS RESIDENTS WANT DOWNTOWN



Q11. What 3 retailers would you most like to see come into Downtown? (n =427)

Q11 is a multiple response question. 427 people provided 1,065 answers. The above chart reflects the % of people mentioning each location.

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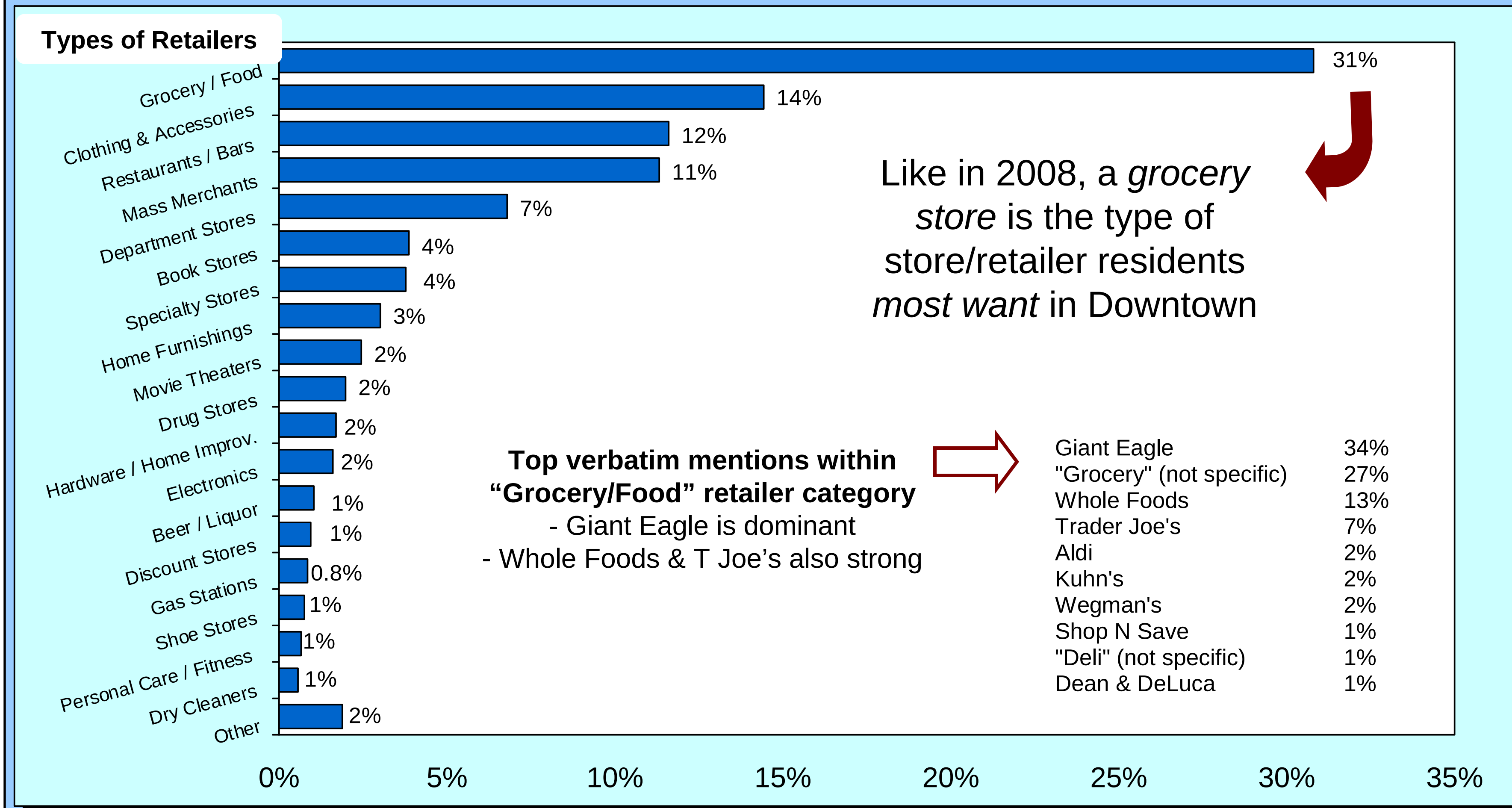
PITTSBURGH DOWNTOWN PARTNERSHIP

RETAILERS RESIDENTS WANT DOWNTOWN



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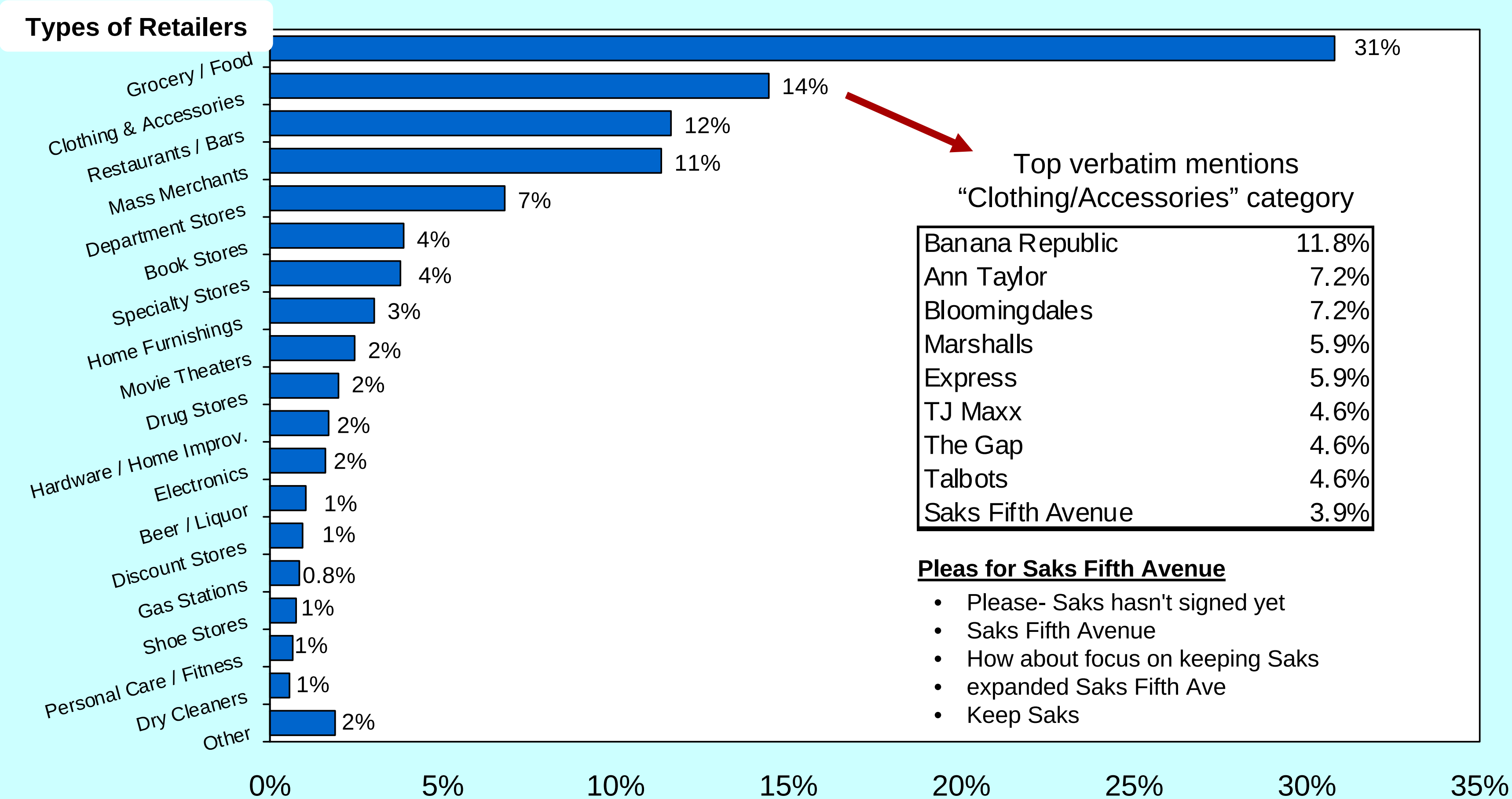
Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

RETAILERS RESIDENTS WANT DOWNTOWN



Top verbatim mentions
"Clothing/Accessories" category

Banana Republic	11.8%
Ann Taylor	7.2%
Bloomingdales	7.2%
Marshalls	5.9%
Express	5.9%
TJ Maxx	4.6%
The Gap	4.6%
Talbots	4.6%
Saks Fifth Avenue	3.9%

Pleas for Saks Fifth Avenue

- Please- Saks hasn't signed yet
- Saks Fifth Avenue
- How about focus on keeping Saks
- expanded Saks Fifth Ave
- Keep Saks

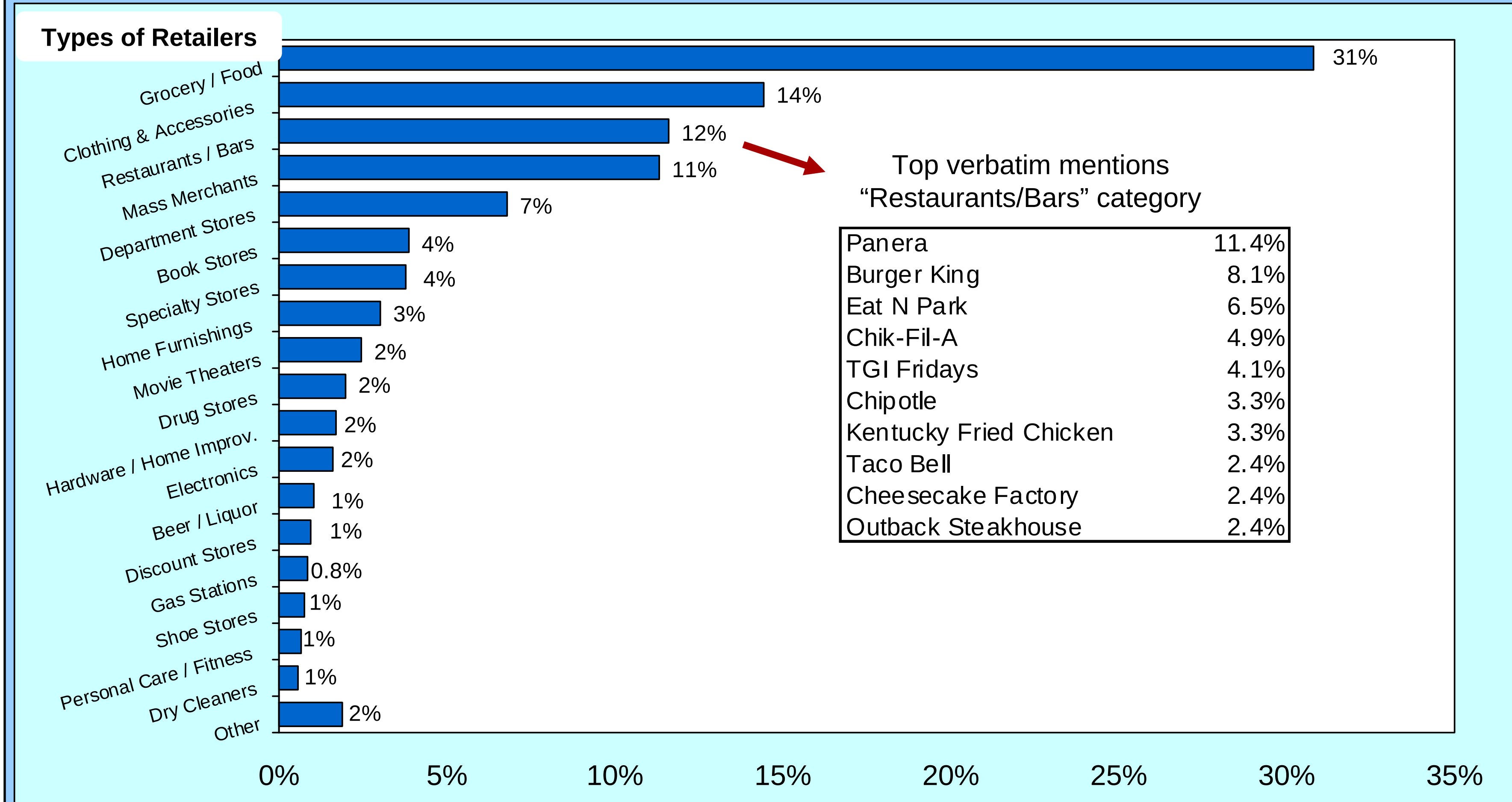
Q11. What 3 retailers would you most like to see come into Downtown? (n =427)

Q11 is a multiple response question. 427 people provided 1,065 answers. The above chart reflects the % of people mentioning each location.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

RETAILERS RESIDENTS WANT DOWNTOWN



Panera	11.4%
Burger King	8.1%
Eat N Park	6.5%
Chik-Fil-A	4.9%
TGI Fridays	4.1%
Chipotle	3.3%
Kentucky Fried Chicken	3.3%
Taco Bell	2.4%
Cheesecake Factory	2.4%
Outback Steakhouse	2.4%

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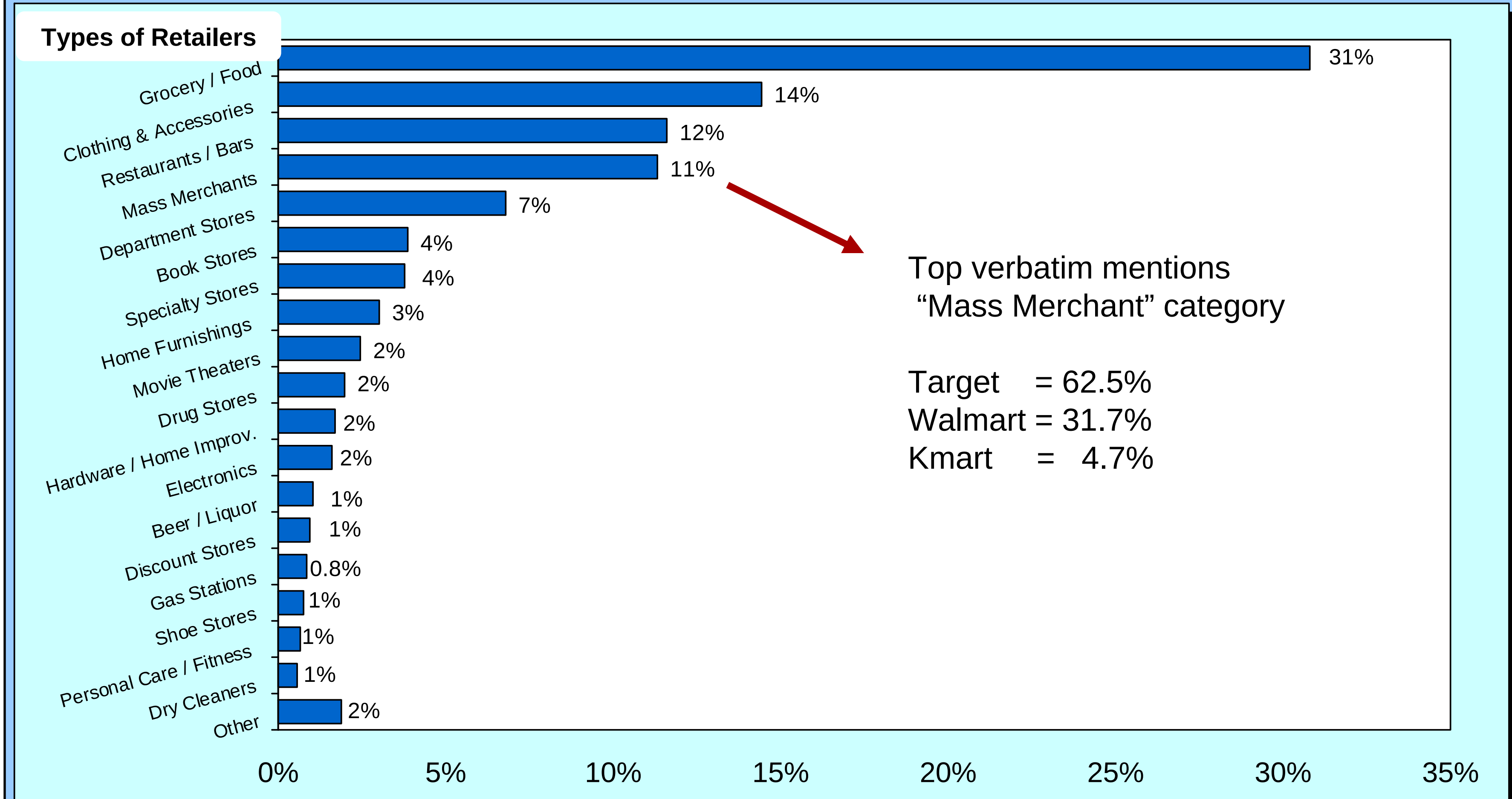
RETAILERS RESIDENTS WANT DOWNTOWN



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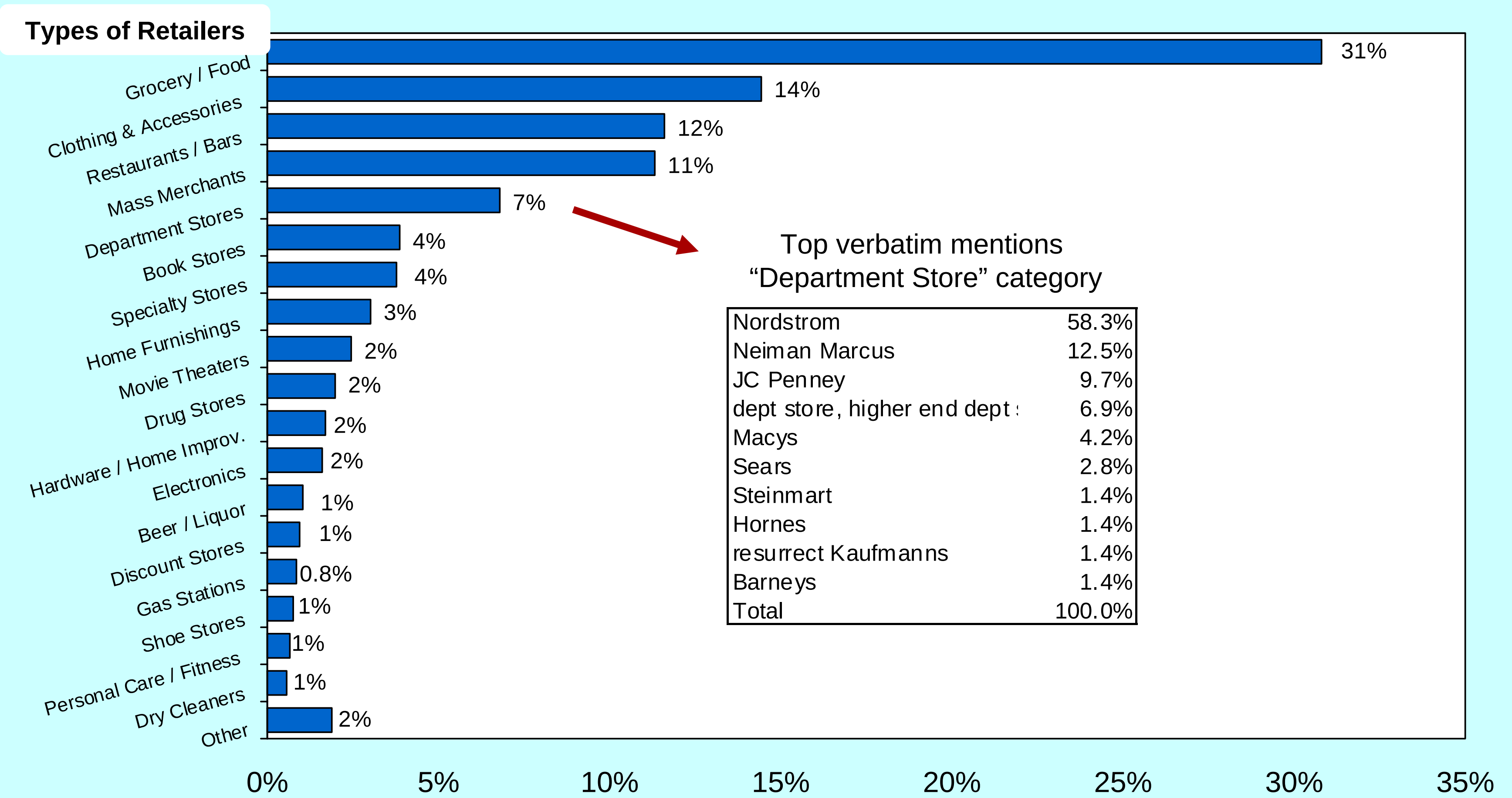
Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

RETAILERS RESIDENTS WANT DOWNTOWN



Top verbatim mentions
"Department Store" category

Nordstrom	58.3%
Neiman Marcus	12.5%
JC Penney	9.7%
dept store, higher end dept :	6.9%
Macys	4.2%
Sears	2.8%
Steinmart	1.4%
Hornes	1.4%
resurrect Kaufmanns	1.4%
Barneys	1.4%
Total	100.0%

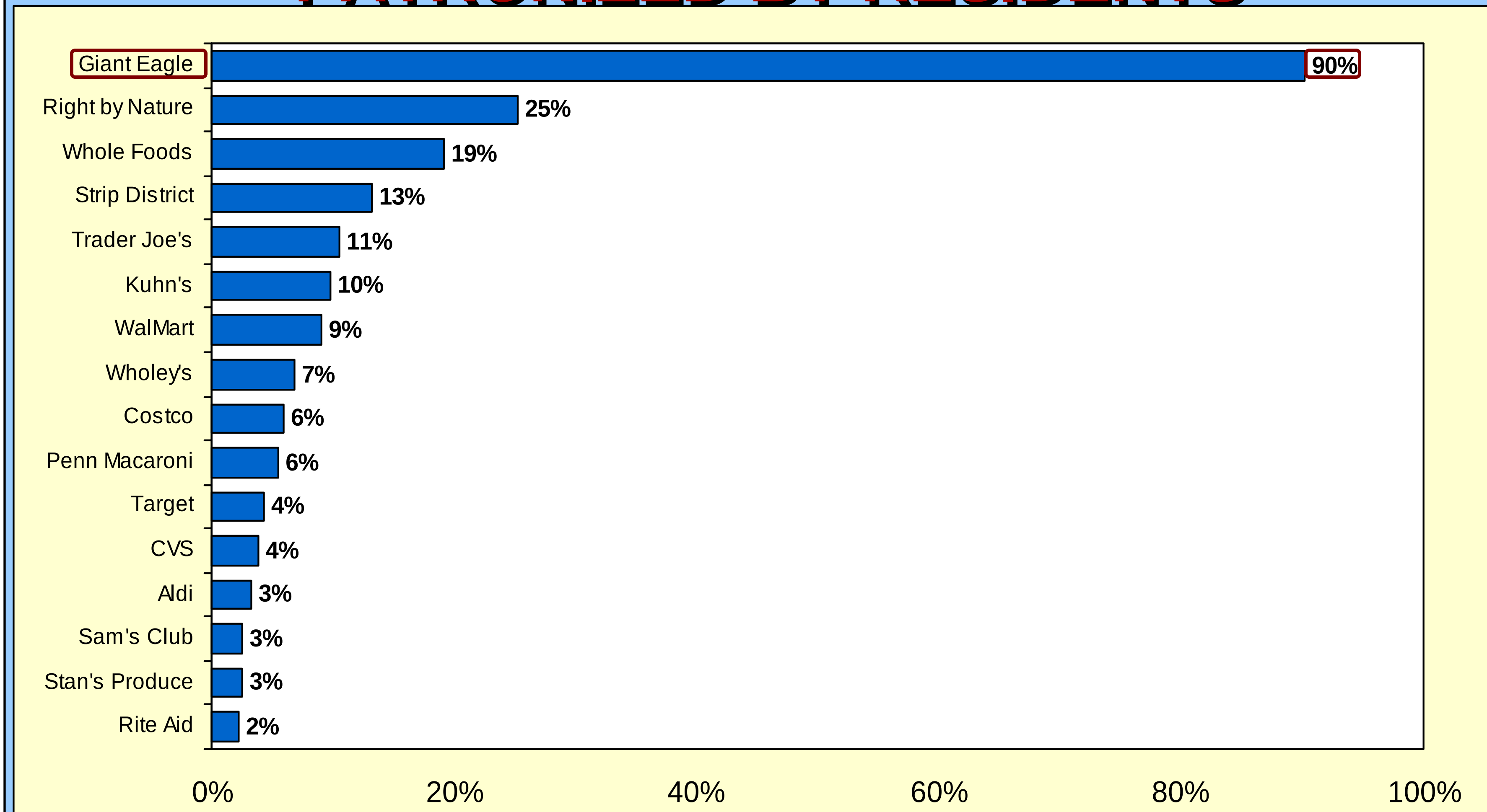
Q11. What 3 retailers would you most like to see come into Downtown? (n =427)

Q11 is a multiple response question. 427 people provided 1,065 answers. The above chart reflects the % of people mentioning each location.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

GROCERY STORES & MARKETS PATRONIZED BY RESIDENTS



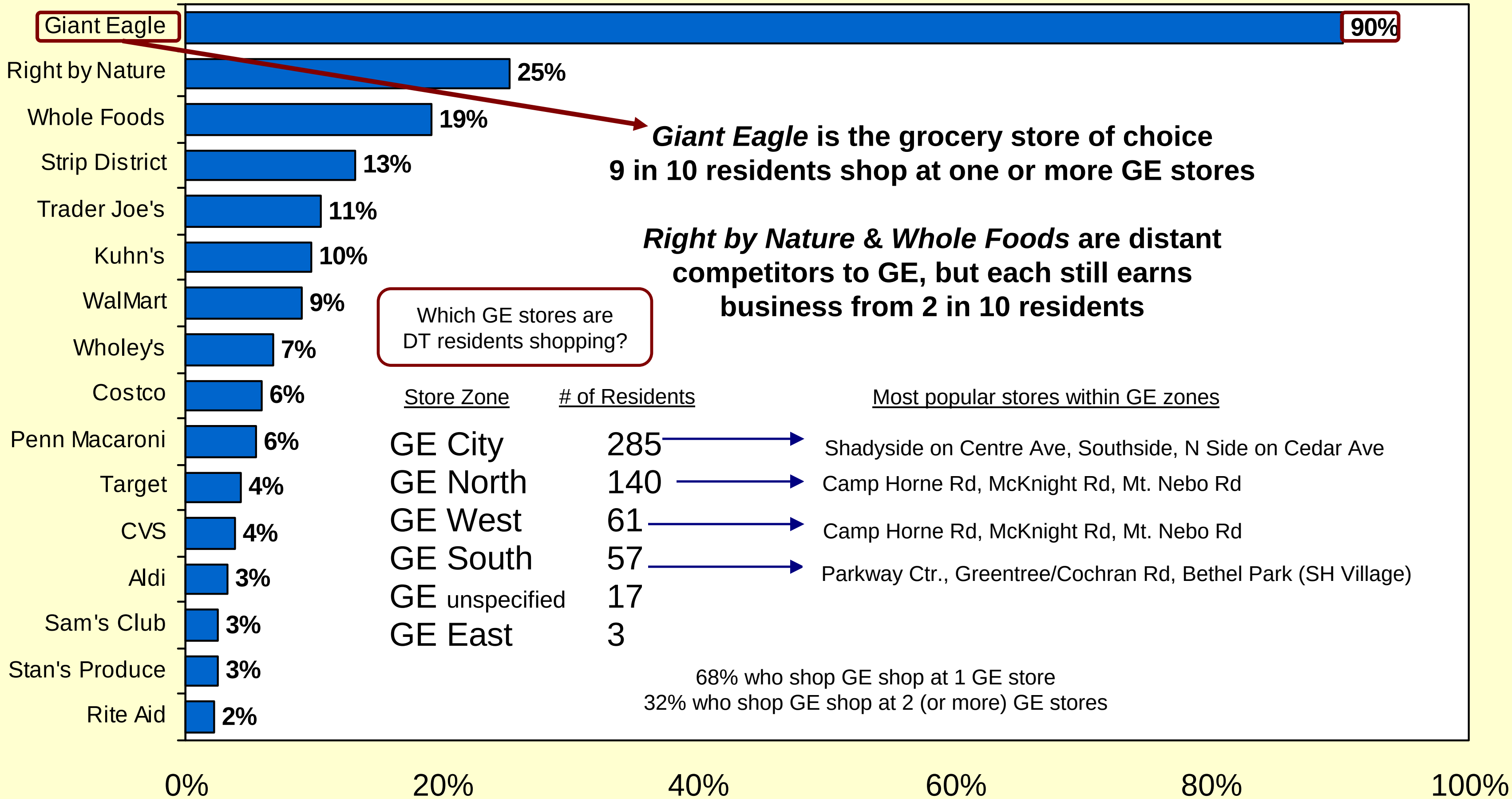
Q12. Please list the grocery stores and/or markets you patronize most often. (n =441)

Q12 is a multiple response question. 441 people provided 1,206 answers. The above chart reflects the % of people mentioning each location.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

GROCERY STORES & MARKETS PATRONIZED BY RESIDENTS



Giant Eagle **is the grocery store of choice**
9 in 10 residents shop at one or more GE stores

Right by Nature **&** ***Whole Foods*** **are distant competitors to GE, but each still earns business from 2 in 10 residents**

Which GE stores are DT residents shopping?

Store Zone	# of Residents	Most popular stores within GE zones
GE City	285	Shadyside on Centre Ave, Southside, N Side on Cedar Ave
GE North	140	Camp Horne Rd, McKnight Rd, Mt. Nebo Rd
GE West	61	Camp Horne Rd, McKnight Rd, Mt. Nebo Rd
GE South	57	Parkway Ctr., Greentree/Cochran Rd, Bethel Park (SH Village)
GE unspecified	17	
GE East	3	

68% who shop GE shop at 1 GE store
32% who shop GE shop at 2 (or more) GE stores

Q12. Please list the grocery stores and/or markets you patronize most often. (n =441)

Q12 is a multiple response question. 441 people provided 1,206 answers. The above chart reflects the % of people mentioning each location.

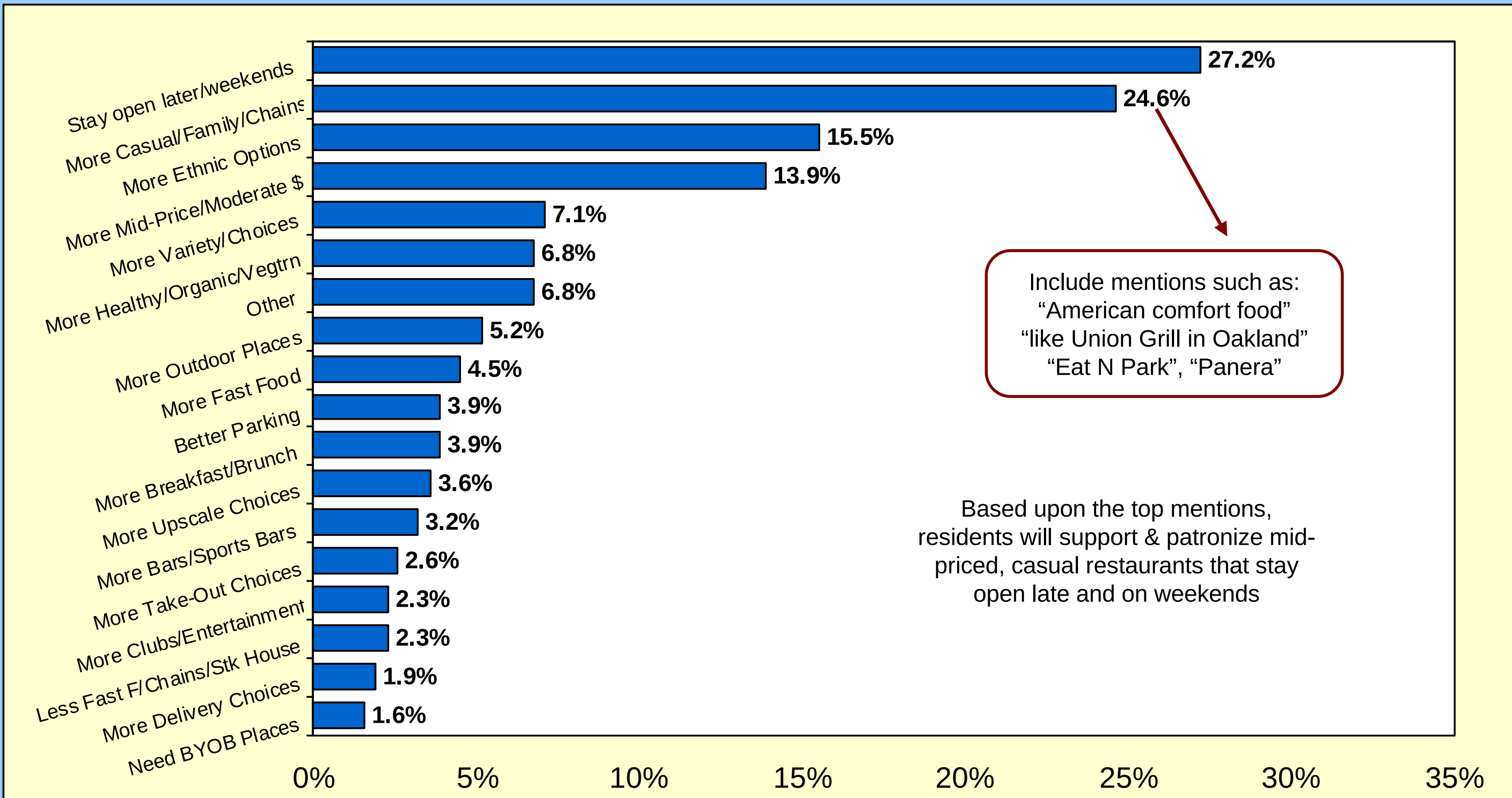
RESTAURANTS

&

DINING BEHAVIOR

IMPROVING DOWNTOWN DINING

Residents' Ideas for Improving Their DT Dining Experience



Q15. What changes and/or additions to Downtown's dining/restaurant scene would better serve your needs (your tastes, budget, lifestyle, etc. (n = 309)

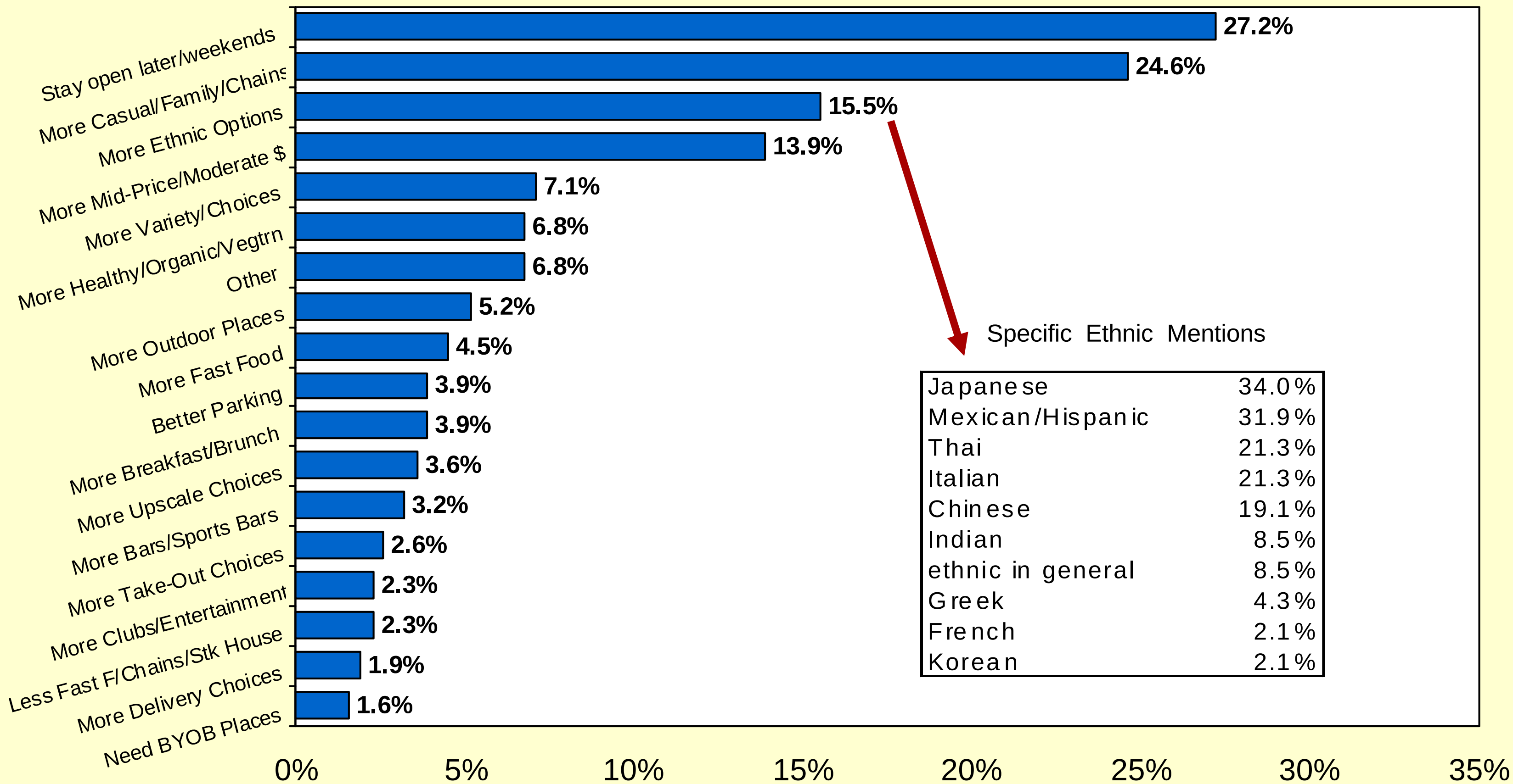
Q15is a multiple response question. 309 people provided 443 answers. The above chart reflects the % of answers cited.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

IMPROVING DOWNTOWN DINING

Residents' Ideas for Improving Their DT Dining Experience

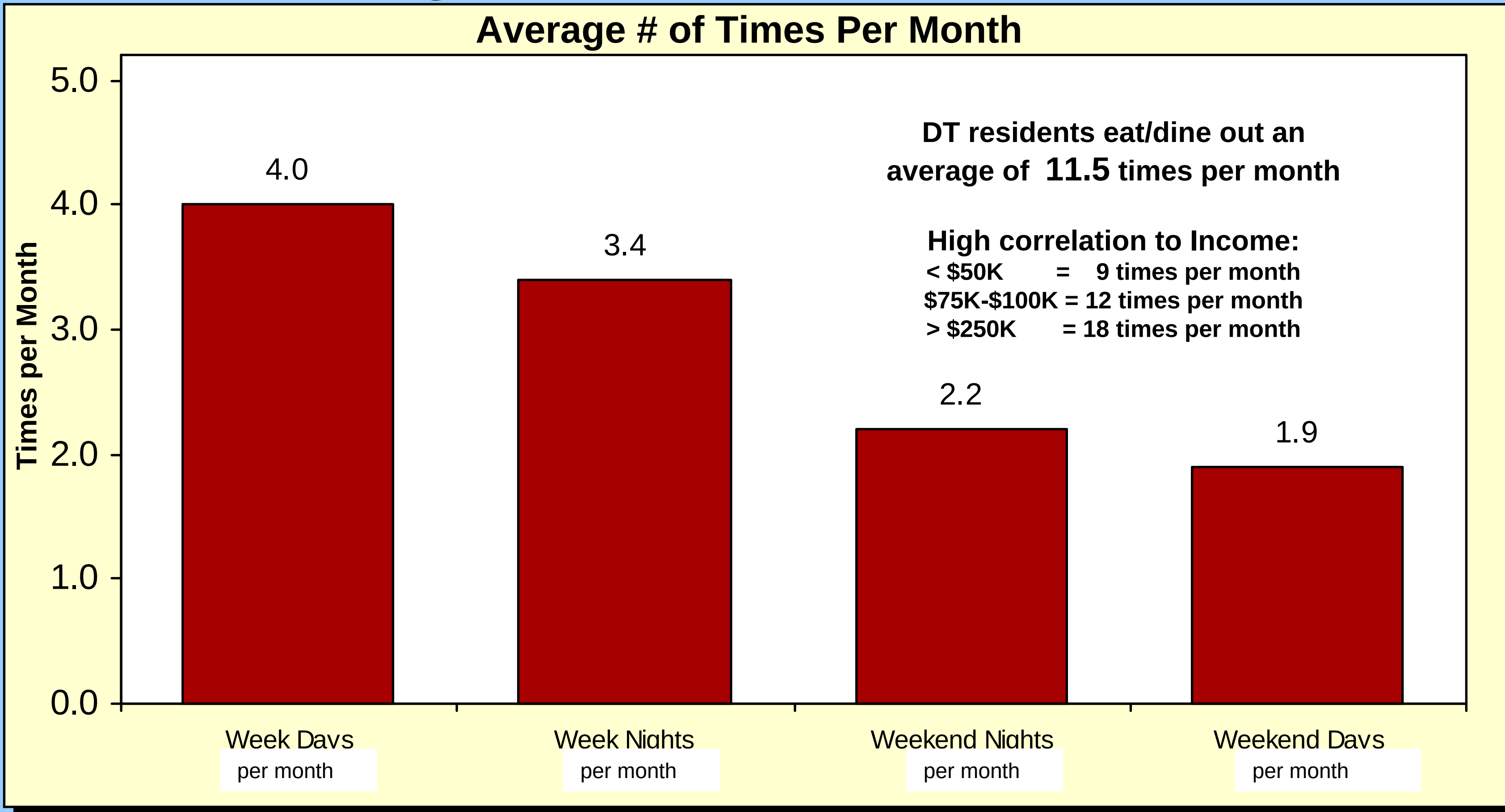


Japanese	34.0%
Mexican/Hispanic	31.9%
Thai	21.3%
Italian	21.3%
Chinese	19.1%
Indian	8.5%
ethnic in general	8.5%
Greek	4.3%
French	2.1%
Korean	2.1%

Q15. What changes and/or additions to Downtown's dining/restaurant scene would better serve your needs (your tastes, budget, lifestyle, etc. (n = 309)

Q15is a multiple response question. 309 people provided 443 answers. The above chart reflects the % of answers cited.

EATING OUT / DINING IN DOWNTOWN
- FREQUENCY BY DAY & TIME -



Q13. How often (# times per month) do you eat/dine out in Downtown restaurants (both formal & casual dining)? (n= 477)

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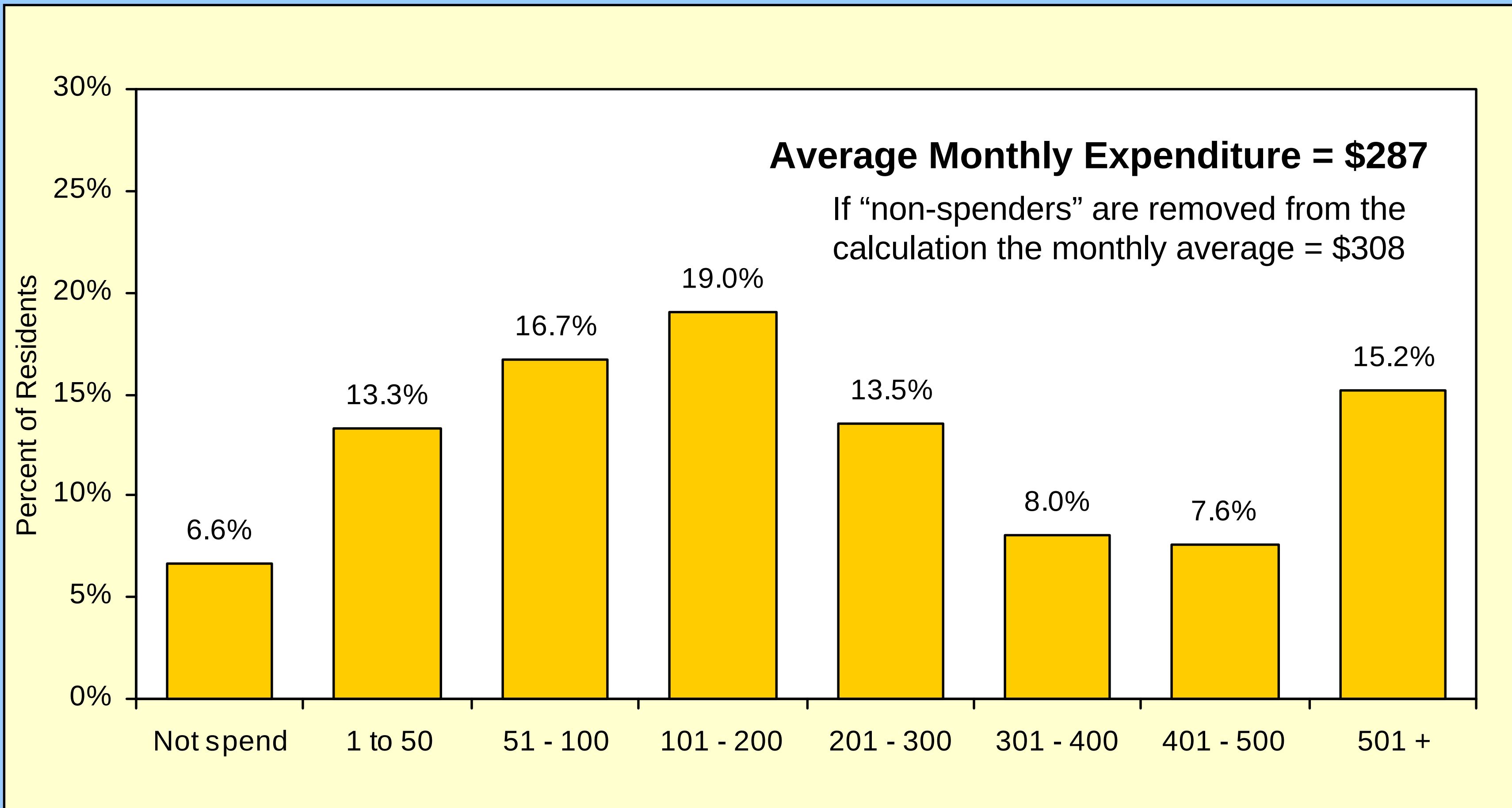
PITTSBURGH DOWNTOWN PARTNERSHIP

DOLLARS SPENT ON DOWNTOWN DINING

Total Amount Spent per Month

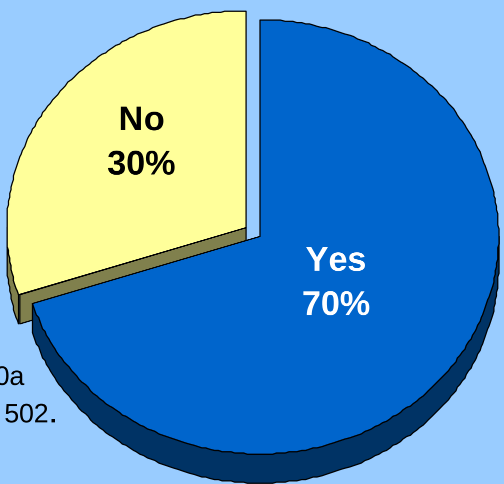


Q14. How much do you spend per month eating/dining out in Downtown? (n = 473)

HARRIS THEATER

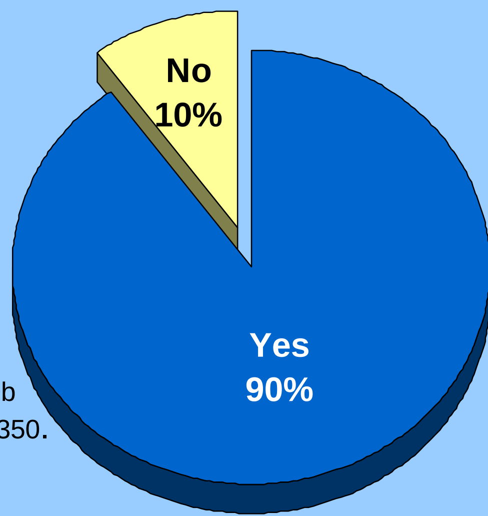
AWARENESS, LOCATION, PATRONAGE OF THE HARRIS THEATER

Aware of Harris?



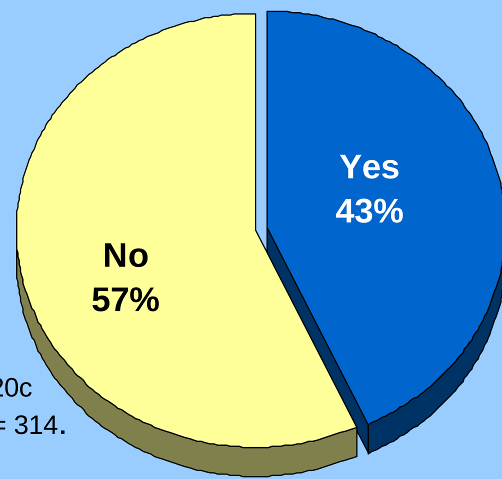
Q20a
n = 502.

Aware of Harris's location?



Q20b
n = 350.

Attend Movies at Harris?



Q20c
n = 314.

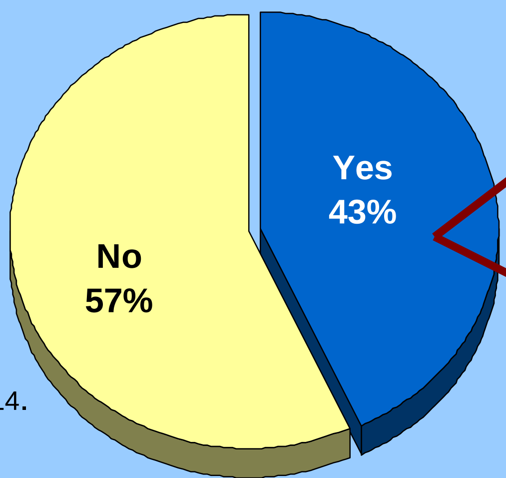
Of those aware, 90% know the theater's location

Of those who know its location, 43% have attended movies

Net # who attended = 136
136 / 502 = 27%

ATTENDANCE & SATISFACTION WITH MOVIES BEING SHOWN AT HARRIS

Attend Movies at Harris?



Q20c
n = 314.

Average # of Movies Attended = 11

On average, residents (who have attended) have been to the Harris for movies *11 times* since living Downtown

50% have been to the Harris just 1 to 3 times. The "long time" Downtown residents (10+ yrs) have visited the Harris most often (28 times).

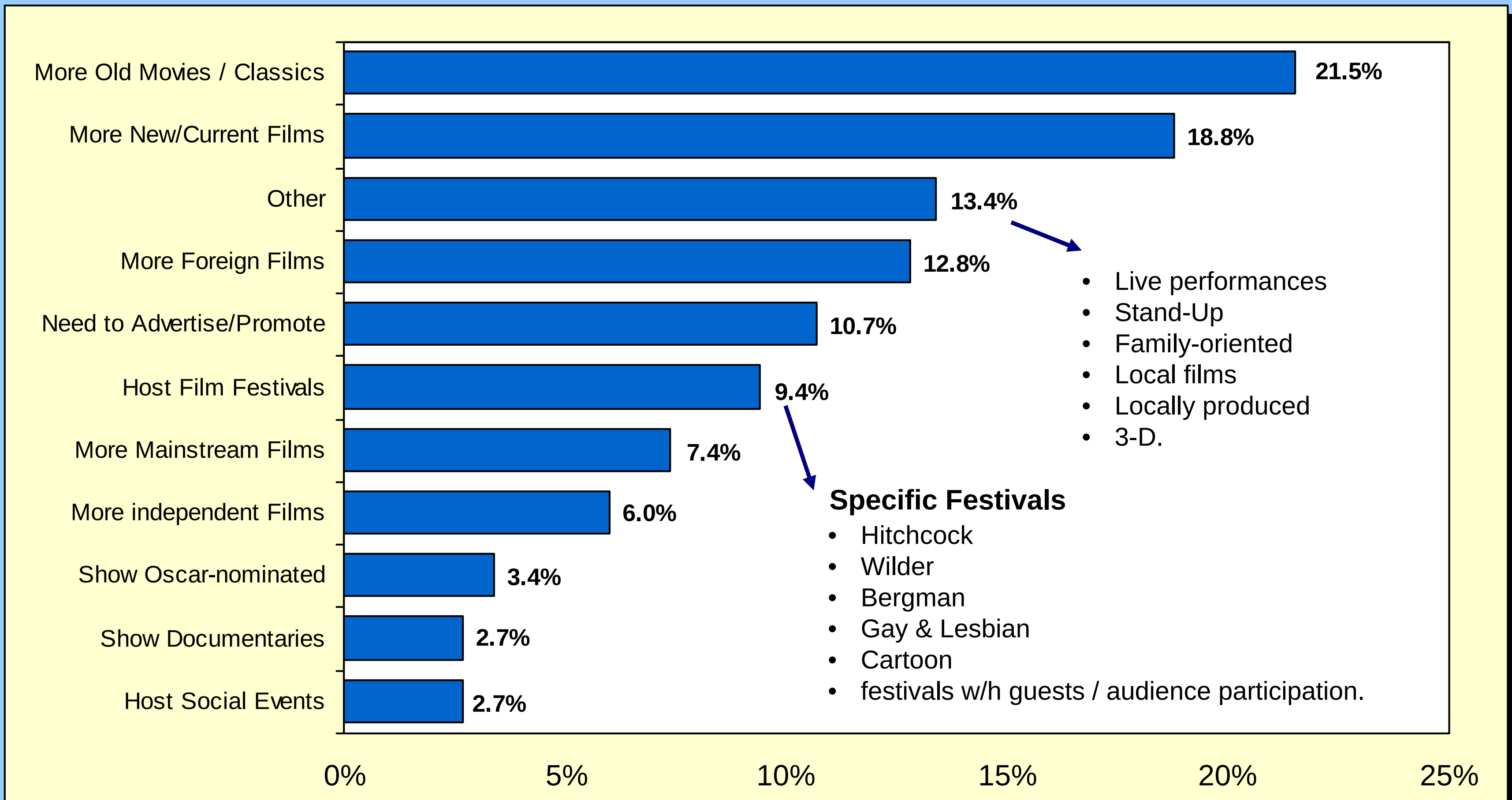
Satisfaction w/ Movie Selection at the Harris Theater = 6.0 (1 - 9 scale)

Residents who attend the Harris are moderately satisfied with the movie selection. On a 1 to 9 scale the average score is 6.0. Just 10% of Harris patrons are "very satisfied" with their movie choices.

Q20d
n = 122

Q20e
n = 124

SUGGESTIONS TO INCREASE ATTENDANCE AT THE HARRIS THEATER



Q20f. What new programs or events could the theater offer to compel you to attend more often (e.g. specific movies, film festivals, etc).? (n = 149)

Q20f is a multiple response question. 149 people provided 186 answers. The above chart reflects the % of people mentioning each area of interest.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

INCREASED ATTENDANCE AT HARRIS
- CUSTOMER SUGGESTIONS -

SUGGESTIONS FROM RESIDENTS WHO HAVE ATTENDED THE HARRIS FOR MOVIES

- 8 pm is usually too early
- after work classics
- ambitious, large film festival, classic films series presented regularly and frequently
- B&W classics with happy hour; series of Bogart/Bacall; Hepburn series
- big and new English-speaking movies
- BYOB theater, serve drinks
- change movies more often - new one every week
- classic films '30s-'50s
- classic movies, popular movies, comedies, drama
- classic, independent and foreign films is what we like and why we go there
- classics (Porgy & Bess)
- classics and oldies
- classics, lectures, Oscar-nominated films, more showings of the film festivals they do have
- comedy shows, more popular meetings, theme nights - ladies night with girl movie
- Content is less important than increasing the marketing/awareness of film events.
- current new movies
- current releases, vintage films, cartoon fest.
- especially enjoy locally produced
- film festivals
- film festivals like they used to have at the Pittsburgh Playhouse - documentaries, foreign and independent

Q20f. What new programs or events could the theater offer to compel you to attend more often (e.g. specific movies, film festivals, etc.? (n = 149)

INCREASED ATTENDANCE AT HARRIS
- CUSTOMER SUGGESTIONS -

SUGGESTIONS FROM RESIDENTS WHO HAVE ATTENDED THE HARRIS FOR MOVIES

- film festivals, classic movie nights, these are poorly advertised
- film fests, themed nights with guests/audience participation
- foreign films
- get more of the "mainstream" art house films at the height of their popularity
- Harlan Jacobson's Talk Cinema
- I'd like to see "regular" movies that are currently out.
- I like how Independent films are often there, but more recent films would be nice too. Also, more advertising. I often do not know which films are being shown.
- I like the choices that rotate through via Pittsburgh Filmmakers: new indie/foreign films, new documentaries. Less interested in classic oldies.
- I like the movies at the Regent Sq. better. Also, oldies, classics, even some current movies would be wonderful. I love movies and am sad there is so little available at the Harris.
- I think they do a great job. It's something you can't get at any of the other theaters, and in that way it's something unique and precious.
- I would love to see more times offered. Make it a destination for film festivals!
- independent movies and foreign movies
- indie and mainstream movies, international film fest
- indy film fest, holiday movies
- international film fests
- it's more about cost because parking is necessary for me also
- Keep up the current good work at the Harris Theater!!!!!!!!!!!! I'd love to see more older movies shown there too. LOVE THE HARRIS!
- let people know what is playing for the month
- live music
- live performances, standup

Q20f. What new programs or events could the theater offer to compel you to attend more often (e.g. specific movies, film festivals, etc.? (n = 149)

INCREASED ATTENDANCE AT HARRIS
- CUSTOMER SUGGESTIONS -

SUGGESTIONS FROM RESIDENTS WHO HAVE ATTENDED THE HARRIS FOR MOVIES

- more first-run; fewer "cult" films
- more jazz by up-and-coming young artists
- more new films, run films for shorter periods
- more of the offerings available at Melwood and Regent Square
- More popular movies of yesteryear. Watching favorite movies on the big screen is always fun.
- more popular showings. less depressing movies. present selection is idiosyncratic.
- more PR
- more recent - oldies/classics - 1970s on
- movies rated A's in Thursday Trib
- movies similar to Manor Theater programming (prior to closing of other SQ Hill theater)
- new movies/new releases, pre-Oscar screening of best picture nominees, classic series of trilogies (Godfather, Star Wars)
- newer release (within a year or two of release)
- occasional but current 4-star commercial films; classic oldies
- popular, artistic movies (think Sundance)
- restored, old movie classics held in a festival week
- some of the old classics. Dr. Zhivago, My Fair Lady, Amadeus. I'm tired of violence. I loved Le Dance.
- sometimes things at Regent Square I wish were being shown at Harris
- Sundance Film Festival
- the film "Andrei Rublev"
- themed film festivals, retrospectives of directors or actors
- try more "neighborhood" events, but have people pay for the evening (say $15-$25/person)
- Would like to see more high quality foreign films.. and few animations and documentaries.

Q20f. What new programs or events could the theater offer to compel you to attend more often (e.g. specific movies, film festivals, etc.? (n = 149)

INCREASED ATTENDANCE AT HARRIS
- NON-CUSTOMER SUGGESTIONS -

SUGGESTIONS FROM RESIDENTS WHO HAVE *NOT* ATTENDED THE HARRIS FOR MOVIES

- '80s movies, classic movies
- 3-D movies
- a combination of big name productions and independent films would help grow the patron numbers
- advertise what is playing
- anything clean/family oriented
- anything to draw people in!
- better advertising - I always forget it's there
- better advertising - I never know what's showing
- better advertising of what's available
- better advertising; foreign films
- better and more times, art house movies
- big-name movies so I don't have to go the Waterfront to watch
- Clark Gable, Cary Grant films
- classic movies
- classic movies, horror films
- classics people have actually heard of; fun B-movies
- cocktails and movies
- Current releases
- film festivals
- film festivals/events, etc.
- first-rate movies
- first rated new movies
- first run movies

Q20f. What new programs or events could the theater offer to compel you to attend more often (e.g. specific movies, film festivals, etc.? (n = 149)

INCREASED ATTENDANCE AT HARRIS
- NON-CUSTOMER SUGGESTIONS -

SUGGESTIONS FROM RESIDENTS WHO HAVE *NOT* ATTENDED THE HARRIS FOR MOVIES

- First run movies and more foreign films/documentaries
- foreign film fests
- foreign films
- foreign films that are nominated for awards
- gay and lesbian film festivals
- get rid of it or put a new Loews somewhere
- I like the movie choices but it would be nice to see current moves there too.
- I only see current movies, usually at the South side Works
- I prefer more mainstream, current movies and would attend occasional showings.
- indie and foreign films
- It's on my list....I forget about it....no preference...
- It would be nice if there were current mainstream movies as well
- It would be nice to have a major release available to view at a theater downtown. Harris Theater plays too many esoteric indy movies.
- large, outdoor electronic sign listing movies the theater is playing or coming soon
- local films
- Mainstream movies like AMC Lowes at the Waterfront
- More advertisement of the movies playing. Play more mainstream movies and make them less expensive.
- more advertising more classic movies, including cult classics
- more film festivals, openings
- more generic movies (blockbuster)
- More mainstream movies While "new" movies are expensive, movies that were ever relevant in pop culture would be considered an improvement.
- Woody Allen series, Polanski series, Indiana Jones series

Q20f. What new programs or events could the theater offer to compel you to attend more often (e.g. specific movies, film festivals, etc.? (n = 149)

INCREASED ATTENDANCE AT HARRIS
- NON-CUSTOMER SUGGESTIONS -

SUGGESTIONS FROM RESIDENTS WHO HAVE *NOT* ATTENDED THE HARRIS FOR MOVIES

- more mainstream/classic movies
- More variety. Foreign movies.
- music, concerts
- new movies (popular)
- new releases and major studio movies
- newer movies from Hollywood
- newly released movies, independent films
- old classics - Casablanca, Gone With the Wind, etc.
- old movies
- Oscar-nominated movies, classic film festivals (i.e. Hitchcock festival)
- Oscar nominated films, summer blockbusters, more popular "indie" films
- Oscar winner's festival Documentaries
- plays
- regular movies, not plays, etc.
- Rocky Horror Picture Show
- second run new releases
- show first run movies The film selection is ideal, but the Harris does tend to get the edgier releases, while Regent Square gets the more mainline international fare. It just so happens that I have been unable to attend screenings lately; especially sad I missed Vertigo last week. :(
- The theater should offer at least one main stream movie release in conjunction with its indie releases.
- They seem interesting but I have not chosen to attend. I would love to see a mainstream theater DT. I haven't been to a movie since moving here. I would also like to see a Redbox somewhere DT.
- we need to be better informed The city blew it building that RIDICULOUS "WILSON MUSEUM"! That was an excellent location of an IMAX theatre with HD!!!- Like they built by Robinson. I will bet you that the museum doesn't generate enough to even pay its bills- I walk by everyday and its empty usually. Who was the brainchild of that???

Q20f. What new programs or events could the theater offer to compel you to attend more often (e.g. specific movies, film festivals, etc.? (n = 149)

MARKET SQUARE DOG PARK BLOCK PARTY

VENDORS RESIDENTS WOULD PATRONIZE IN MARKET SQUARE ON WEEKDAYS

WEEK DAYS

food (lunch)	37%
breakfast/brunch	24%
ice cream/frozen yogurt/gelato	18%
coffee	17%
newsstand (papers/magazines/books)	7%
bread/bakery	6%
food (dinner)	5%
produce	5%
sandwiches	4%
fast food/takeout	4%
ethnic	3%
food - healthy, light, vegetarian	2%

WEEK NIGHTS

food (dinner)	39%
ice cream/frozen yogurt/gelato	28%
beer/wine/bars/happy hour	28%
coffee	8%
fast food/takeout	5%
newsstand (papers/magazines/books)	5%
food - healthy, light, vegetarian	4%
sushi/seafood	3%
hot dogs	2%

Q16. What types of vendors would you patronize in Market Square? – top 12 mentions
Days n = 166 Nights n = 163

VENDORS RESIDENTS WOULD PATRONIZE IN MARKET SQUARE ON WEEKENDS

WEEKEND DAYS

breakfast/brunch	74%
ice cream/frozen yogurt/gelato	19%
food (lunch)	18%
newsstand (papers/magazines/books)	12%
coffee	12%
bread/bakery	4%
beer/wine/bars/happy hour	4%
produce	3%
sandwiches	2%
flowers	2%
deli	2%
hot dogs	2%

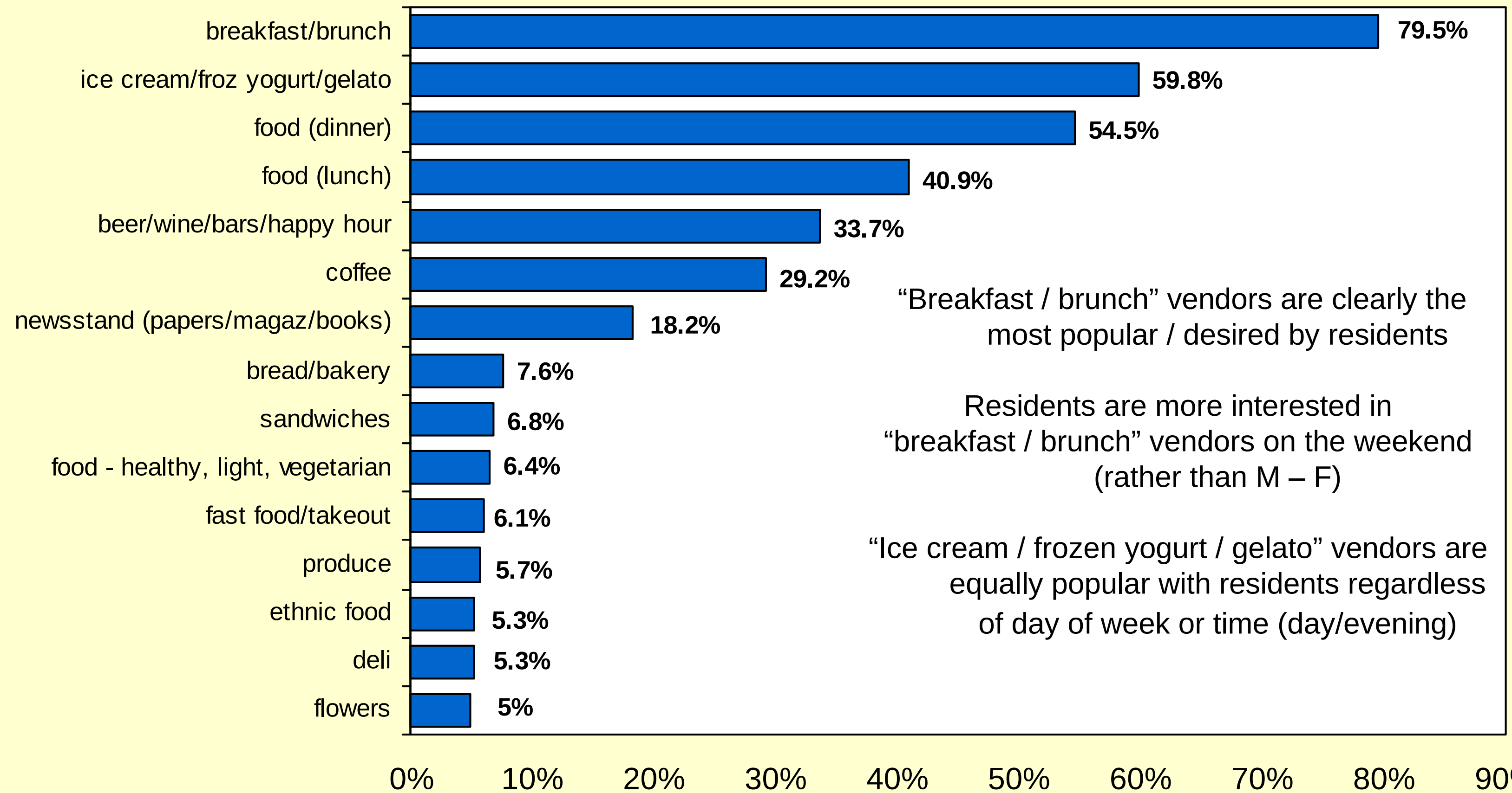
WEEKEND NIGHTS

food (dinner)	50%
ice cream/frozen yogurt/gelato	28%
beer/wine/bars/happy hour	24%
coffee	7%
music/entertainment	5%
food (high end, "fancy")	4%
food - healthy, light, vegetarian	3%
ethnic	3%
food (lunch)	2%
sandwiches	2%
sushi/seafood	2%
movies	2%

Q16. What types of vendors would you patronize in Market Square? – top 12 mentions
Days n = 226 Nights n = 196

MARKET SQUARE VENDOR SUMMARY

All Responses (Mon. - Fri. & Weekends)



"Breakfast / brunch" vendors are clearly the most popular / desired by residents

Residents are more interested in "breakfast / brunch" vendors on the weekend (rather than M – F)

"Ice cream / frozen yogurt / gelato" vendors are equally popular with residents regardless of day of week or time (day/evening)

Q16. What types of vendors would you patronize in Market Square? – top 15 mentions(n=264)

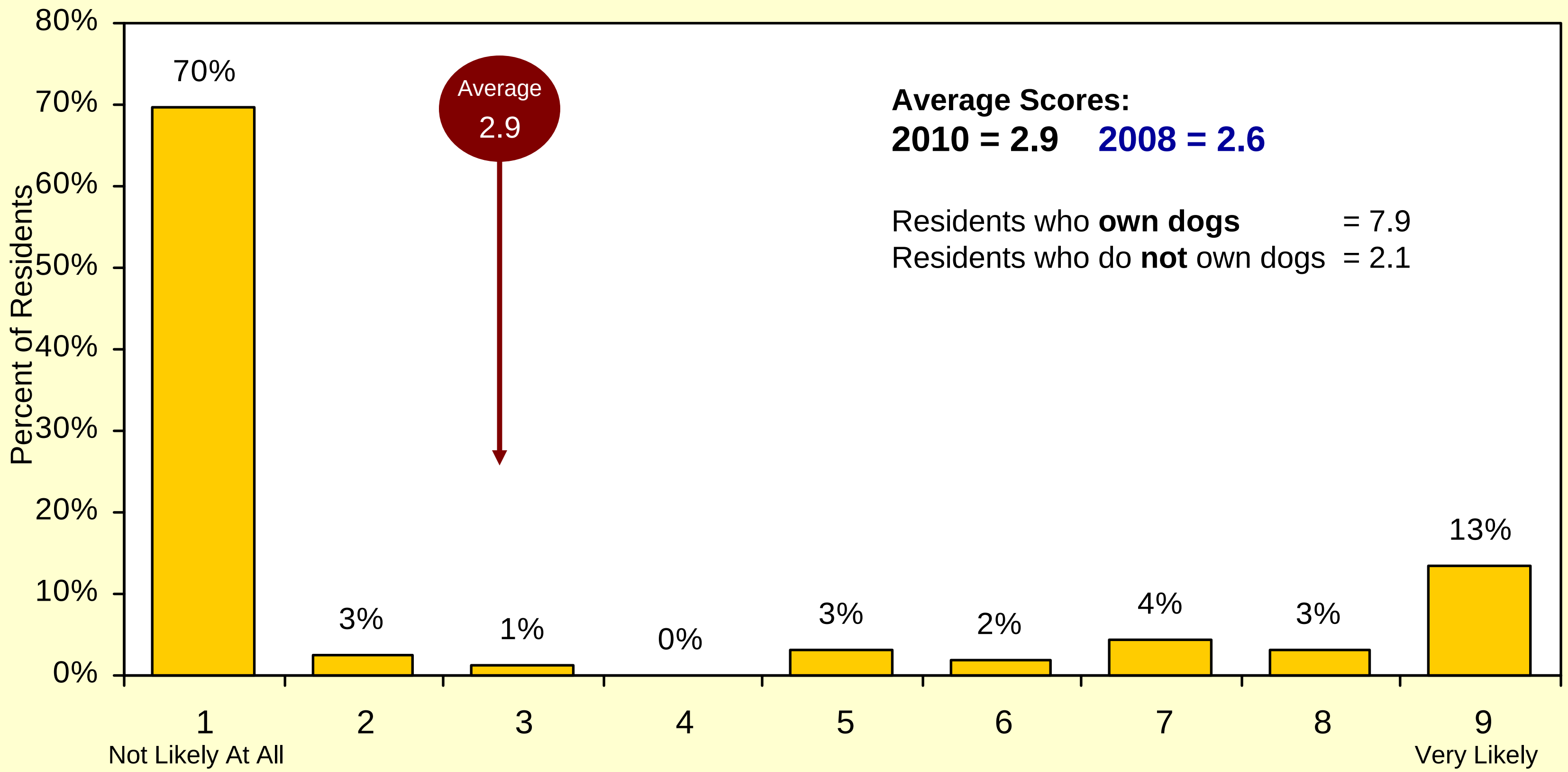
Q16 is a multiple response question. 264 people provided 1,046 answers. The above chart reflects the % of people mentioning each area of interest.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

LIKELIHOOD TO USE DOG PARK

1 = Not Likely at All; 9 = Very Likely



Average Scores:
2010 = 2.9 **2008 = 2.6**

Residents who **own dogs** = 7.9
Residents who do **not** own dogs = 2.1

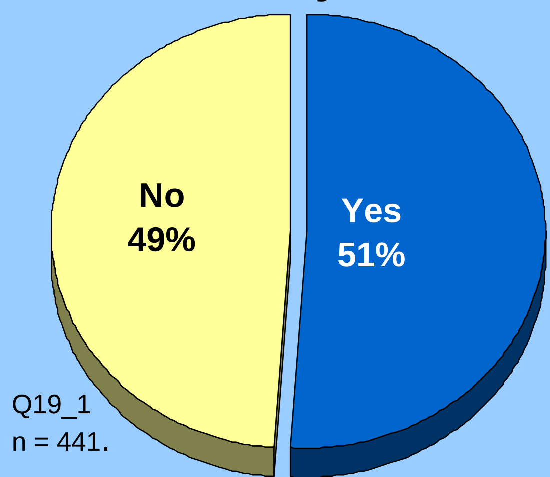
Q17. If a small off-leash dog park was established near Gateway Center, how likely would you be to use it? (n = 430)

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

AWARENESS & PARTICIPATION WITH DT EVENTS AND PROGRAMS

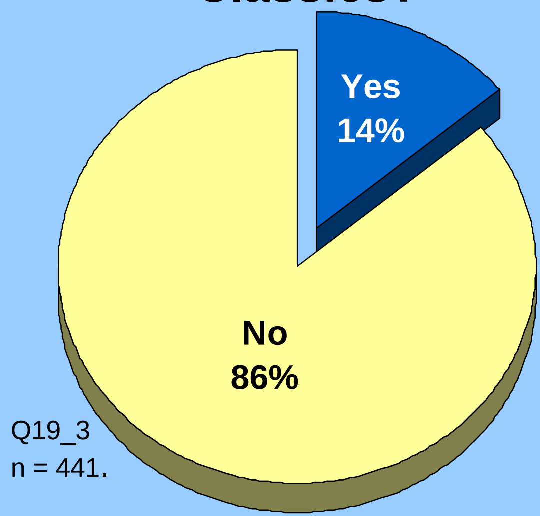
Aware of Block Party?



Of those aware, less than half (43%) attended the Block Party

Net # who attended = 96
96 / 441 = 22%

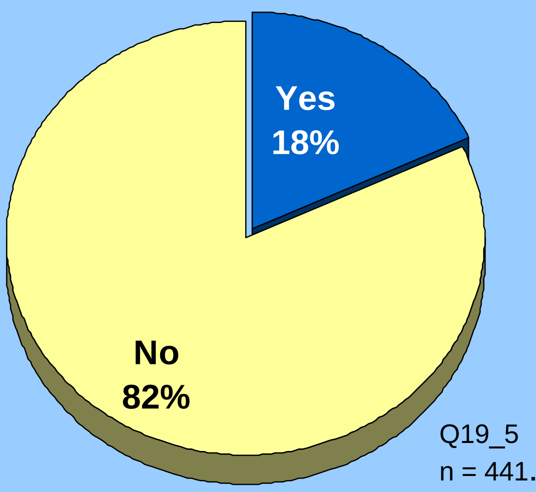
Aware of Downtown Classics?



Of those aware, 53% attended the Downtown Classics program

Net # who attended = 33
33 / 441 = 8%

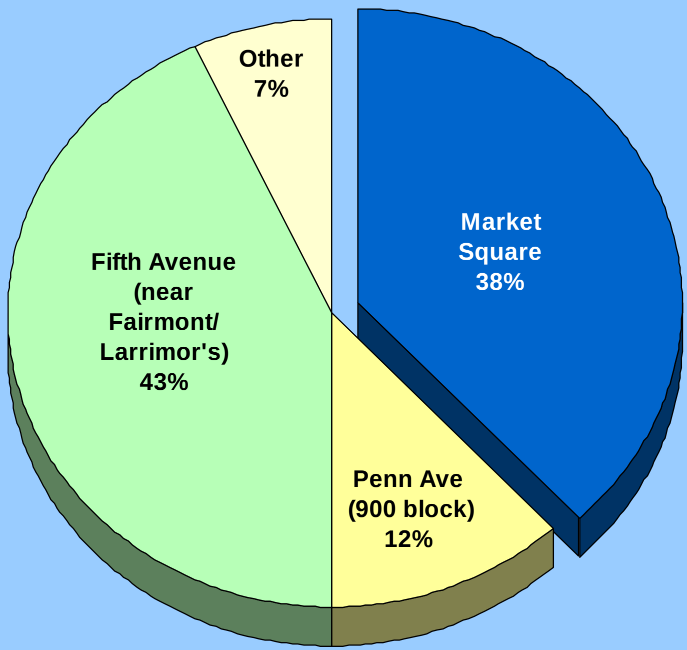
Aware of verticallifepgh.com?



Of those aware, 44% visited Vertical Life (verticallifepgh.com)

Net # who visited = 34
34 / 441 = 8%

DESIRED LOCATION - 2010 BLOCK PARTY



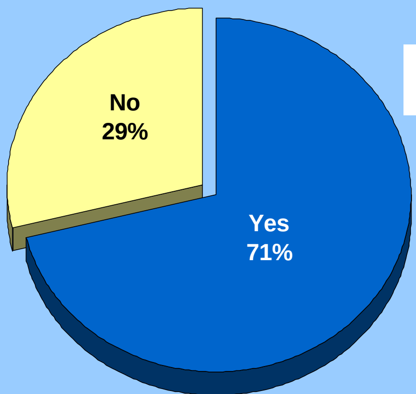
"Other" suggested locations

6th ave. between Liberty & Ft Duq
700 block of Penn Avenue
anywhere with easy walking access
Crawford & Centre
Fifth Avenue
Gateway Center or the Point
Liberty Avenue near Benedum
no preference
PNC Plaza - more open space
Point Park
Point St Park
Strip District
the Point
the Strip
The Strip
we do not attend crowd events

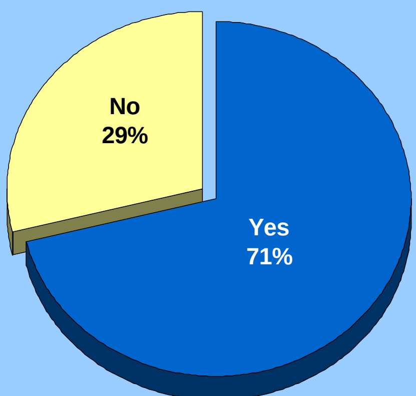
Q19a. Last year the City of Pittsburgh allowed residents to hold their Block Party on Penn Ave. When we apply for the event permit this year, which would you most like to se as the site of the 2010 Block Party (circle one)? (n = 232)

DESIRE FOR MORE NEIGHBORHOOD INVOLVEMENT & NEIGHBOR NETWORKING

2010



2008



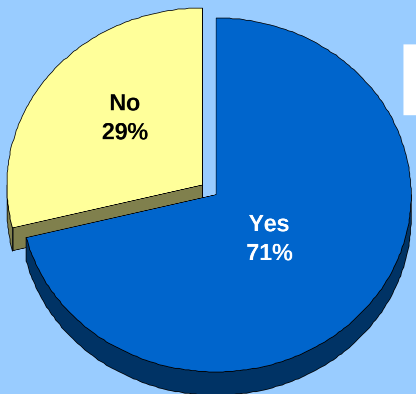
Overall % Saying "Yes" = 71% Identical in '08 & '10

On average, interest levels are similar by building in '08 & '10

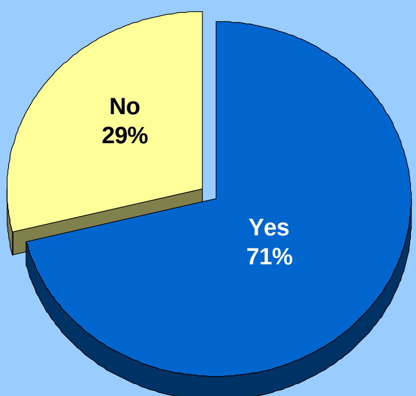
Low interest from same buildings in '08 and 2010

Q21. Would you like to have more opportunities to become more involved w/ your neighbors and Downtown neighborhood? (n = 466)

DESIRE FOR MORE NEIGHBORHOOD INVOLVEMENT & NEIGHBOR NETWORKING



2010



2008

% Saying "Yes" by Building

	2008	2010
Brake House	NA	100%
941 Penn Avenue	NA	100%
900 Penn Avenue	100%	50%
Crawford Square	88%	70%
Lincoln at N.S.	83%	89%
Penn Garrison	78%	92%
Cork Factory	76%	78%
151 First Side	75%	86%
Midtown Towers	75%	64%
Pennsylvanian	74%	71%
No Walls / Small Projects	73%	75%
The Encore	72%	69%
625 Stanwix	71%	82%
May Building	70%	73%
Wash. Plaza	69%	61%
Heinz Lofts	*68%*	*62%*
Gateway Towers	*65%*	*54%*
930 Penn Avenue	64%	83%
Roosevelt Arms	*58%*	*46%*
Chatham Towers	*50%*	*56%*

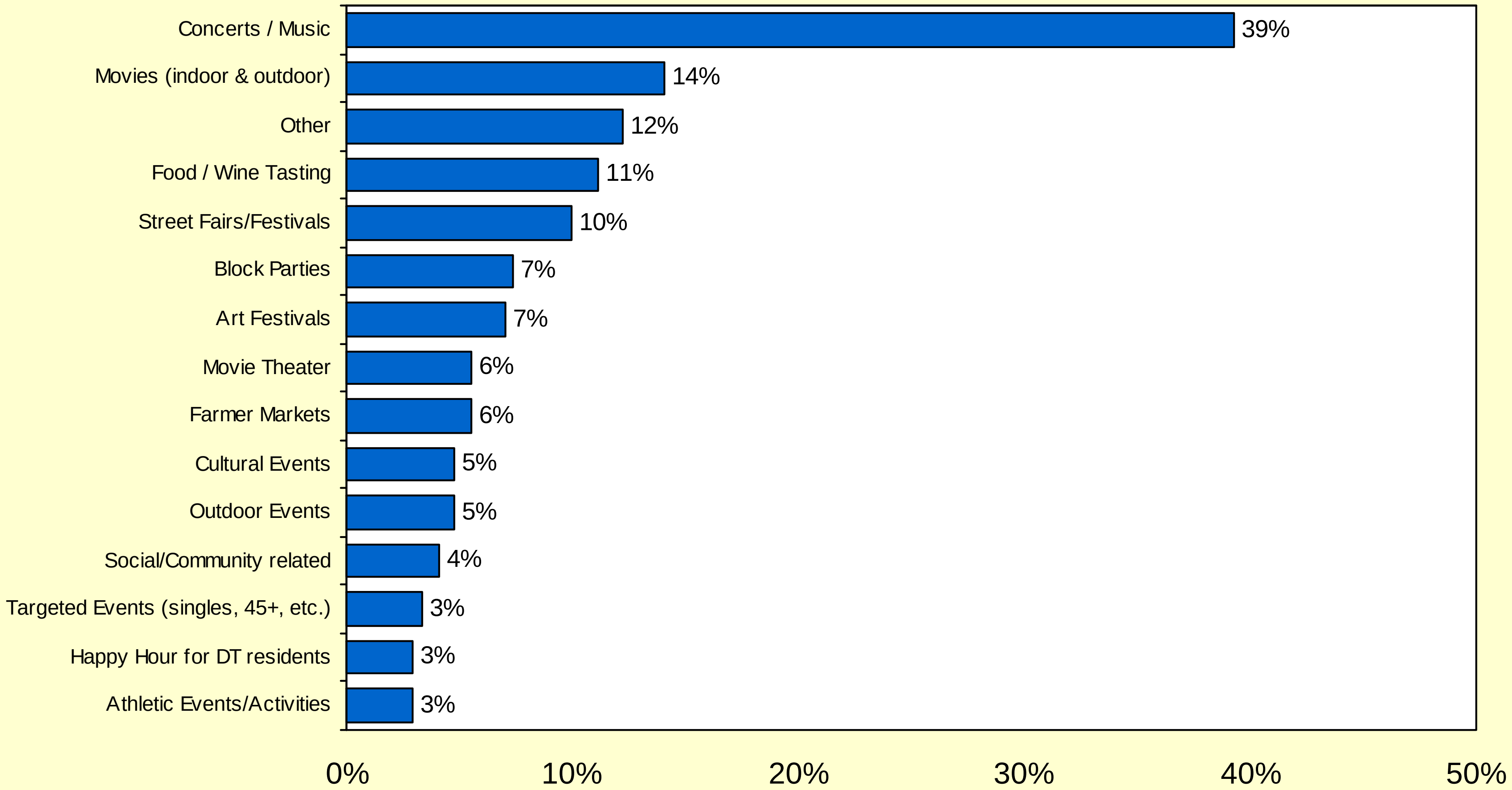
On average, interest levels are similar by building in '08 & '10

Low interest from same buildings in '08 and 2010

Q21. Would you like to have more opportunities to become more involved w/ your neighbors and Downtown neighborhood? (n = 466)

DOWNTOWN NEIGHBORHOOD EVENTS

Events Suggested by DT Residents

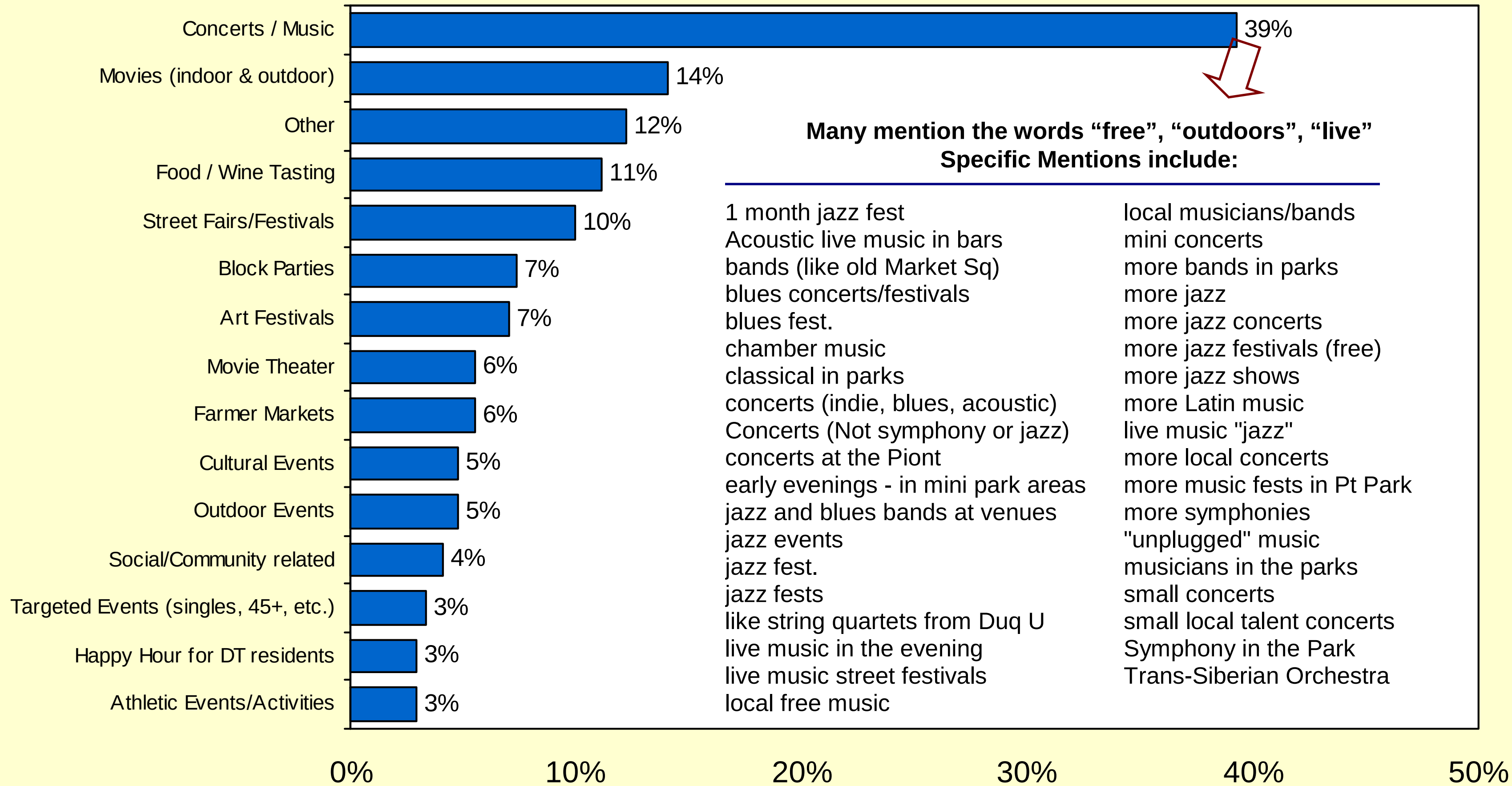


Q18. What specific types of events would you like to see made available (or see more often) for you in your Downtown neighborhood? (n = 270)

Q18 is a multiple response question. 270 people provided 446 answers. The above chart reflects the % of people mentioning each type of activity.

DOWNTOWN NEIGHBORHOOD EVENTS

Events Suggested by DT Residents



Q18. What specific types of events would you like to see made available (or see more often) for you in your Downtown neighborhood? (n = 270)

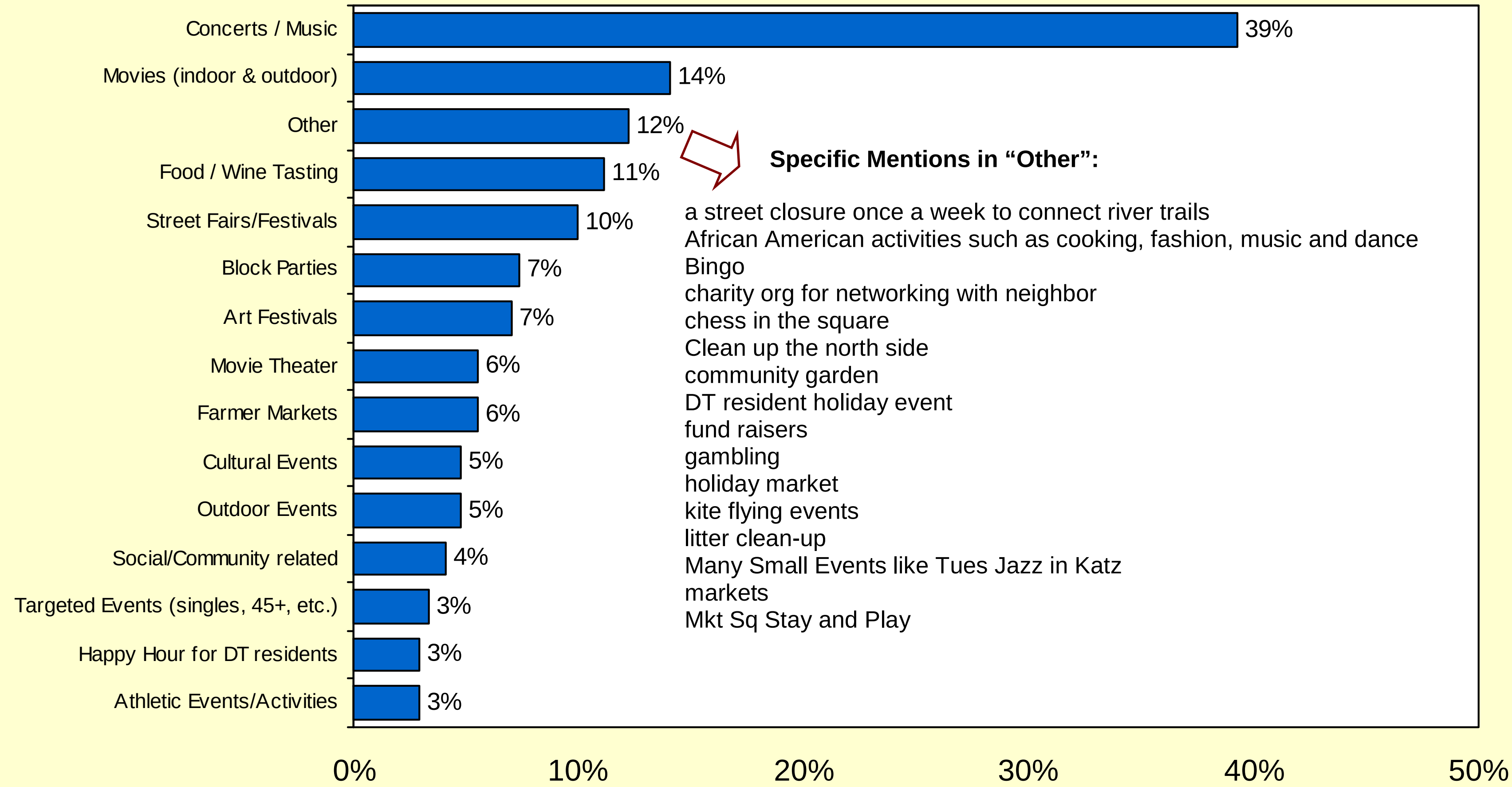
Q18 is a multiple response question. 270 people provided 446 answers. The above chart reflects the % of people mentioning each type of activity.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

DOWNTOWN NEIGHBORHOOD EVENTS

Events Suggested by DT Residents



Q18. What specific types of events would you like to see made available (or see more often) for you in your Downtown neighborhood? (n = 270)

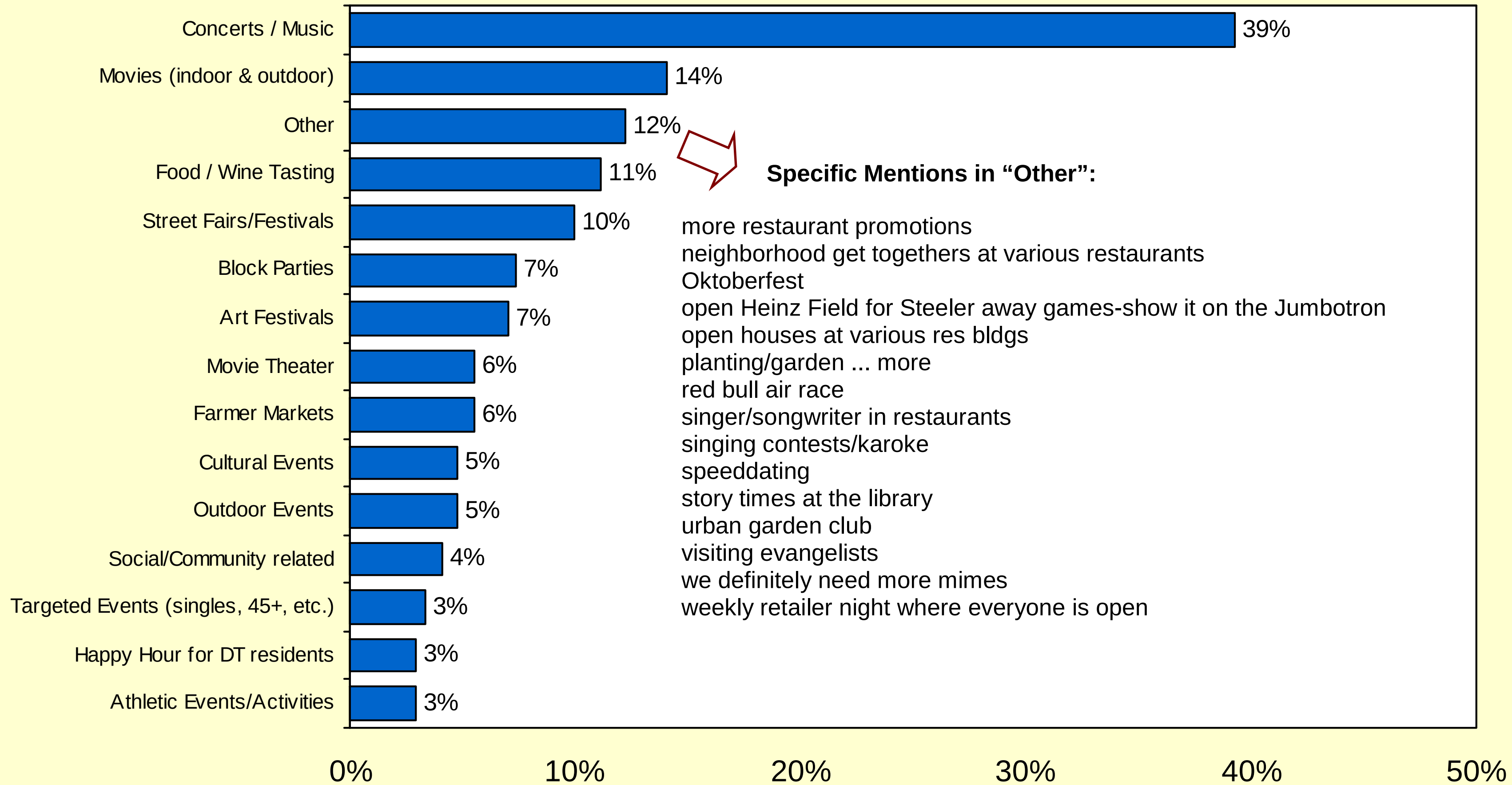
Q18 is a multiple response question. 270 people provided 446 answers. The above chart reflects the % of people mentioning each type of activity.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

DOWNTOWN NEIGHBORHOOD EVENTS

Events Suggested by DT Residents



Q18. What specific types of events would you like to see made available (or see more often) for you in your Downtown neighborhood? (n = 270)

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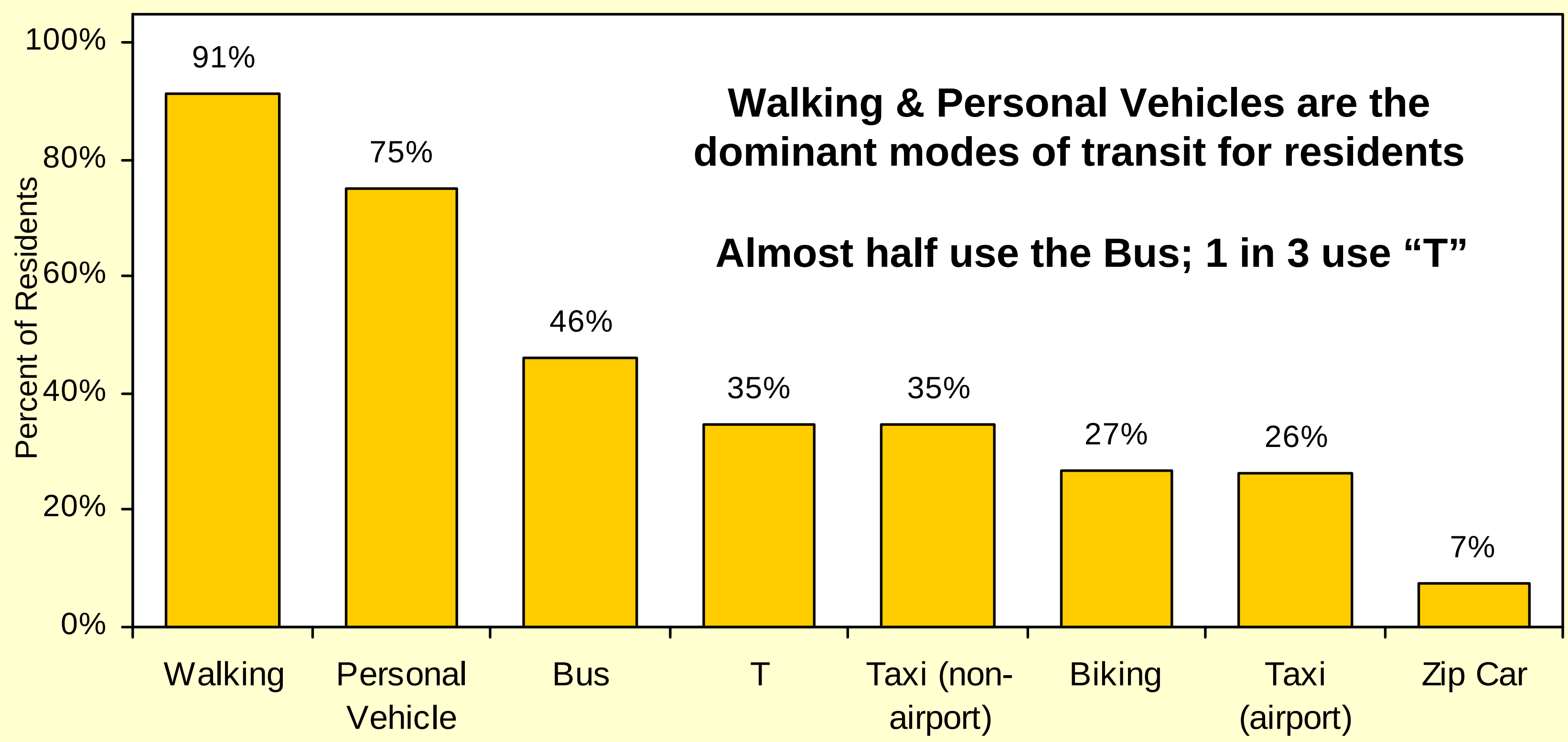
PITTSBURGH DOWNTOWN PARTNERSHIP

TRANSPORTATION

PARKING

ZipCar

MODES OF TRANSPORTATION USED BY RESIDENTS

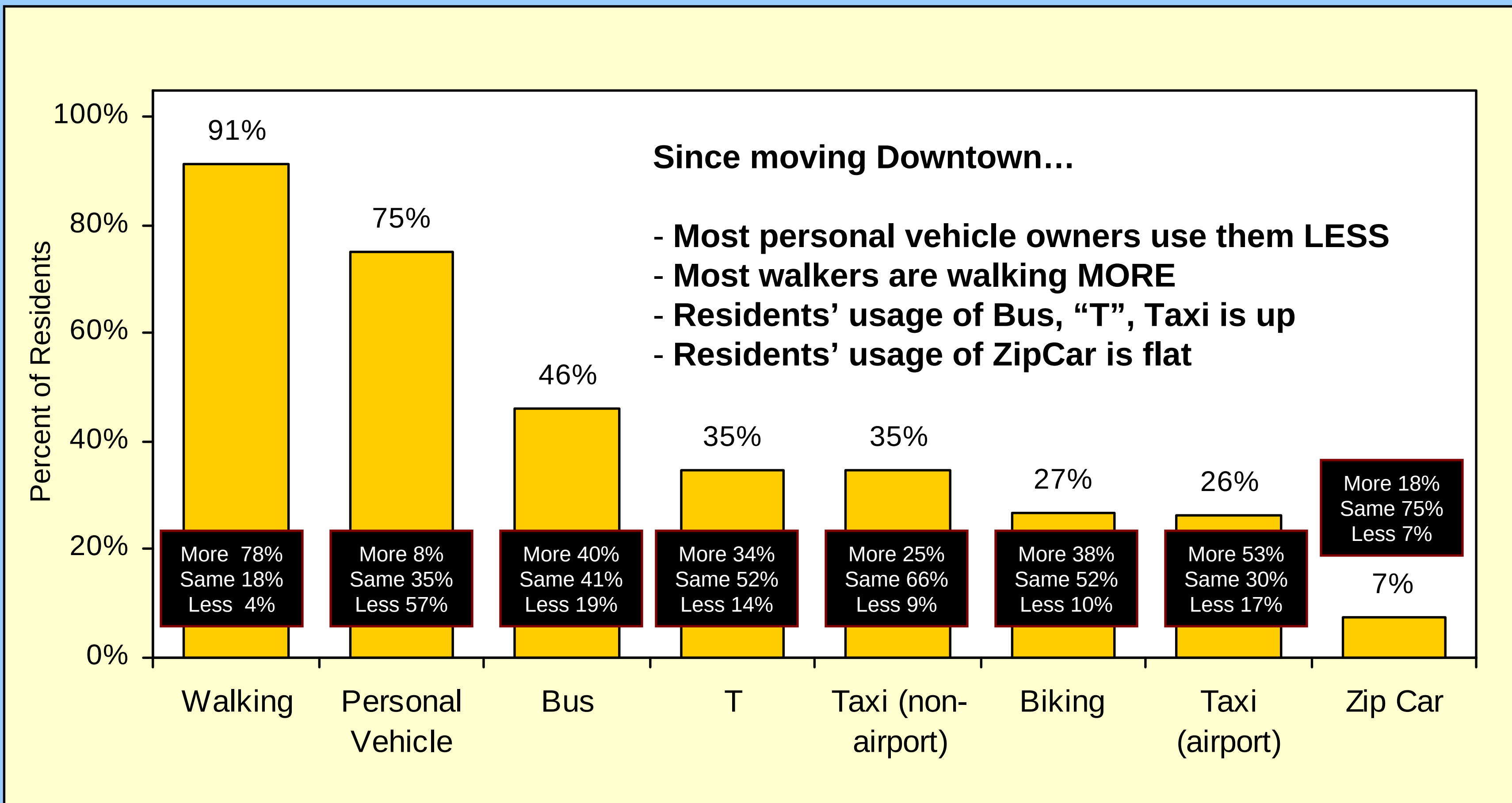


Q22. Indicate if you currently use each of these modes of transportation. Also indicate if you are using each more, the same, or less since moving Downtown (n = 506)

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

MODES OF TRANSPORTATION USED BY RESIDENTS

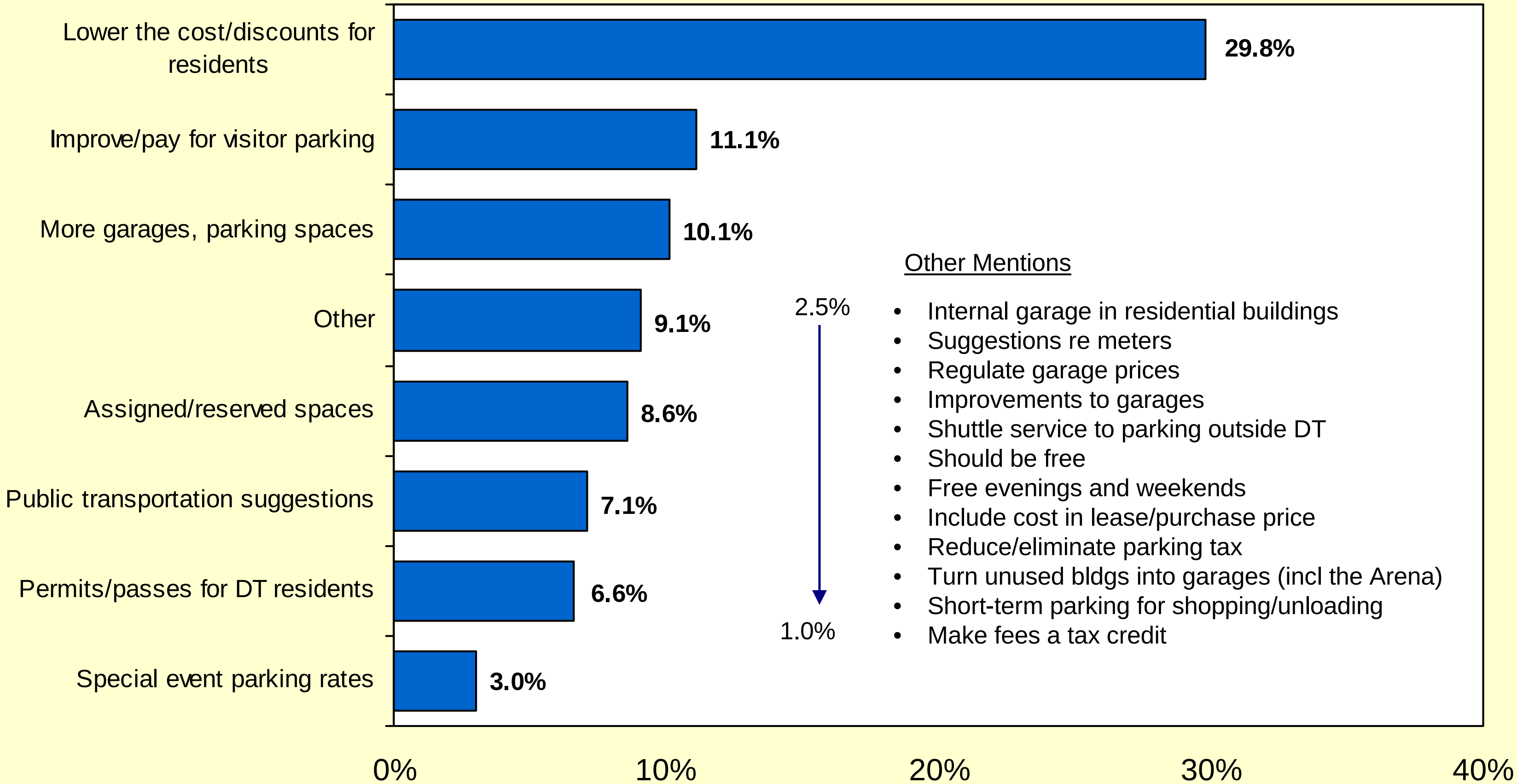


Q22. Indicate if you currently use each of these modes of transportation. Also indicate if you are using each more, the same, or less since moving Downtown (n = 506)

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

IMPROVING PARKING OPTIONS FOR DOWNTOWN RESIDENTS



Other Mentions

- Internal garage in residential buildings
- Suggestions re meters
- Regulate garage prices
- Improvements to garages
- Shuttle service to parking outside DT
- Should be free
- Free evenings and weekends
- Include cost in lease/purchase price
- Reduce/eliminate parking tax
- Turn unused bldgs into garages (incl the Arena)
- Short-term parking for shopping/unloading
- Make fees a tax credit

Q23. If you consider the parking situation for DT residents problem, please share any ideas you may have to improve it? (n = 198)

Q23 is a multiple response question. 198 people provided 214 answers. The above chart reflects the % of people mentioning each area of concern.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

PARKING COMMENTS

Verbatim Responses from Residents

- Residents should be given more options for street parking. Many streets are either meter operated or restricted in certain hours. Residents should be given exceptions in areas of downtown where there are more residential buildings. Also, improving the transit system for people who live outside of downtown and work downtown will encourage them not to drive downtown. Finally, increasing bus service during events such as hockey games will allow people to take the bus to the game rather than drive.
- Residents have to pay higher costs if there is an event. Residents should be exempt of meter parking with a resident card to encourage people to move DT more without raising taxes.
- resident should receive preferential treatment. coupons should be provided for guests of residents
- residents should be given choice for reserved spots at discounted rates in garages to ensure spots are not taken by non-residents, especially during events
- resident parking should cost less if leasing in a garage
- More buildings need to incorporate the parking into their packages and negotiate deals for residents. In both buildings I've lived downtown, parking was the selling point for me. I REFUSE to pay high downtown rent prices AND a $150+ parking lease per month. The pain is lessened when it is included in the lease as it feels like the savings are being passed on to residents.
- It is the biggest problem in Pittsburgh but It is easy to solve it. As I know, It is the steel and the rivers city. So, you can build big parkings above the three rivers like what did you do for bridges. Just use steel and rivers to create a huge space for parkings . Thank you . Msaad Alzhrani msaad_878@hotmail.com
- I park in the Theatre Square Garage. I wish that the lower floors were designated for residents. I don't like carrying groceries 10 floors when the garage is packed due to a show. Other than that i have no complaints. My car is always safe and i trust the staff very much.
- Actually it was the reason that I decided to buy in strip district rather that at the Piatt! Was concerned about getting in and out of downtown Pittsburgh at any time. So if this is really about the heart of downtown then know that I chose the Strip Dist
- 1) increase availability of knowledge for carpooling, 2)adjust pkg places to spots based on hours ??? and time of day
- 1) Downtown residents should get discounted parking in downtown parking lots 2)The buildings where residents live should NOT charge residents' guests for parking (The Pennsylvanian). If the management does not want to purchase the lot, they should buy or rent spaces.
- When a car stops and parks with their flashers on the side of the streets it causes back ups. This needs to STOP. Even though it says "no parking" no one pays attention. We need MORE parking garages that are more easily accessible. They are very difficult to navigate through once inside.

Q23. If you consider the parking situation for DT residents problem, please share any ideas you may have to improve it? (n = 198)

PARKING COMMENTS
Verbatim Responses from Residents

- The meter system is outdated. Chicago moved to a 2 hour credit card system that despite its initial problems works much better because we don't have to carry quarters! LAZ Parking
- Push for indoor parking for new residential building conversions. Few/dozen comp parking passes per resident per month for guests.
- Provide resident permit parking stickers to place in car for use on streets w/i a select radius around your home (similar to the system used in Oakland/Shadyside)
- let lease owners have certain levels of parking or a separate entrance to garages. not fair to pay 155 dollars and wait to get into a garage and park on a very high floor when you have groceries etc.
- It would be nice if there was some way to "validate" parking for downtown residents after hours or if downtown residents could purchase some kind of discounted rate for guests.
- It frightens me to death that the city wants to lease the parking...If we want to encourage downtown living parking needs to be secure and accessible...period!
- I feel to increase the resident growth and maintain those already here, free parking should be included for ALL residents of Downtown.
- Free parking/parking pass/permit for downtown residents, MUCH MUCH LOWER/FREE/VALIDATED PARKING to draw in visitors, WAY MORE CABS & WAY BETTER CAB COMPANIES, MORE T STOPS, DOWNTOWN BUS/trolley service within the downtown area free for downtown residents leaving every hour or half hour
- improve/expand the T system so that people don't need to drive to get DT
- if you sell the garages, stipulate a fixed rate for documented residents
- if privatize city garages, cost to residents should stay same or decrease
- I wish theater parking lots would leave space for residents, i.e. third floor
- have some meters (or all eventually) that accept credit cards
- Driving around downtown when there is no where to park, I often see in the evenings and on weekends, several small lots which are closed just wasting space that could be used for people to park in.
- cheaper and more available; i.e. Southside Works $3 nights/weekends - near, clean and close
- cheap parking for visiting guests, with in and out privileges.. particularly irritating when a guest comes, to pay 10 dollars for the morning then you go out and come back for another 10 dollars!!
- Build more ramps. On street parking makes traffic a nightmare-reduces to one lane and makes everything 10 times slower

Q23. If you consider the parking situation for DT residents problem, please share any ideas you may have to improve it? (n = 198)

PARKING COMMENTS

Verbatim Responses from Residents

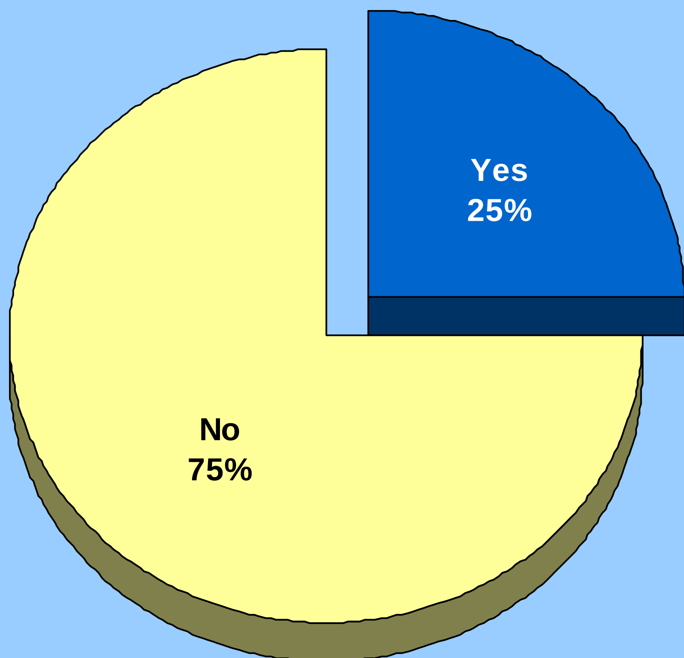
- Be able to put money on a lease card and use it at other garages. Have more on-street parking.
- Pittsburgh needs an inner city tram system with parking outside of the city.
- one-day passes at reduced cost should be available to res for guests
- offer some kind of parking card to use for DT events. Maybe a flat rate or pay/use.
- more taxis
- more meters for more than 1 hour - a low cost lot for shoppers
- lower parking garages fares; try to make independently owned
- keep the taxes off
- It is outrageously expensive. More competition desired, this is a monopoly!
- improve public transit - make it more direct-routed, more express service; proper security and shelter
- I get tickets all the time! Allow us to get a permit and/or get better deals at garages on leases or daily use.
- get rid of street parking, create underground parking garages
- create a map of public garages and times; cost per hour/day/weekend, etc.
- Again- the city BLEW IT!- Us residents cannot fathom the "tunnel to nowhere" that costs over $560 million and still hasn't received the final $144 million it will need to get completed!!!!!!!!!!!!!!!!!!!!!!!! A above ground rail system should have been constructed connecting to Shadyside/Oakland.
- I think it's unfixable - because of greed!
- tear down Mellon Arena and add parking
- stop building stadiums and start investing in parking

Q23. If you consider the parking situation for DT residents problem, please share any ideas you may have to improve it? (n = 198)

RESIDENT USAGE OF PARKING LEASES

Pittsburgh Parking Authority Leases

Do you lease parking spaces from the Parking Authority?

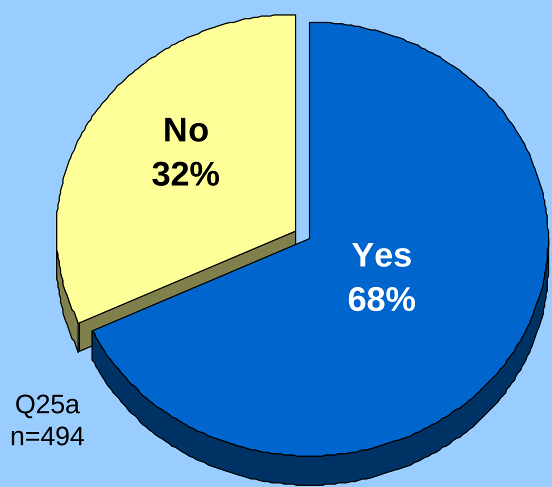


Of those who do lease parking spaces, 80% lease 1 space while just 20% lease 2 or more spaces

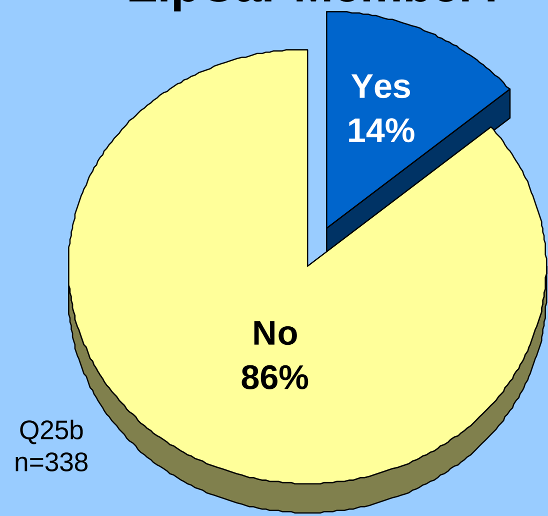
Q24. Do you currently lease 1 or more parking spaces from the Pittsburgh Parking Authority? (n = 494)

ZipCar AWARENESS & USAGE

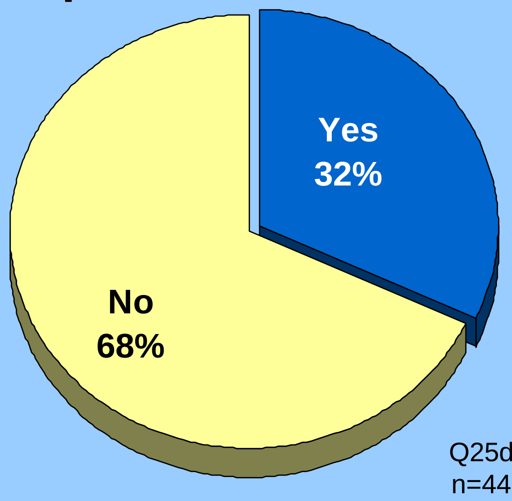
Aware of ZipCar?



If Aware, are you ZipCar Member?



If Member, has ZipCar Prompted You to Sell Car?



Awareness dropped 5 percentage points since 2008

Membership rate stays low; 14% in ’08 & 2010

Usage by members rises:
2010 = 9.9 times over 6 mos.
2008 = 6.5 times over 6 mos.

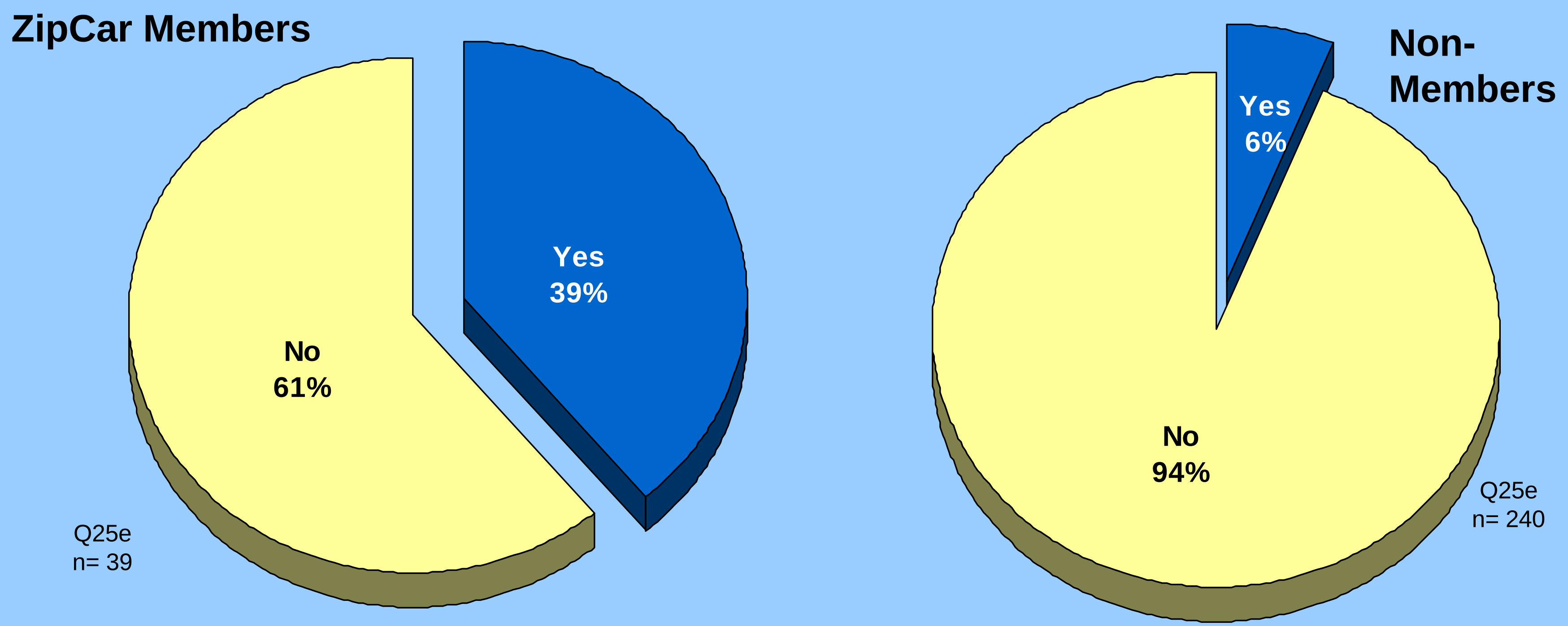
ZipCar Summary
% of ALL residents who are…
Aware & Member & User: (34/494) = ***7%***

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

PRIVATIZED PARKING'S & ZipCar

If parking facilities were privatized, would you use ZipCar instead of your own?



Q25e. If the city's public parking facilities were privatized, would you use ZipCar instead of your own car/vehicle? (n = 279)

Privatizing public parking is more likely to increase ZipCar usage among members, but makes only a minimal impact on attracting non-members.

FINAL COMMENTS

FINAL COMMENTS - 1

- Start campaigns for a clean neighborhood... about the litter...and cigarette butts...and then the buses...uggh.... to outskirts of city.....if you are on grant street or near cultural district...it's aok...in the middle near fifth, wood and Smithfield, its awful...get the buses to the perimeter of the city....wood street is a nightmare...buses...lights out of sync...loitering....litter....embarrassing for our fine city
- Please stop the construction so late in the evening & early morning. It is so hard to get any sleep with all the drilling. Also, it is so hard to live downtown when there is no grocery store. I have to travel every time and sometimes I do not have a means of transportation. Lastly, the parking is ridiculous downtown; there are no affordable leases or any street parking. How am I supposed to live downtown if I can't use my car to get anywhere- especially since there is nothing I need downtown.
- When will construction in Downtown "end"!
- The lack of availability of Point State Park for years is a disgrace.
- Please try to get the Hilton to finish the work!! It is awful!!
- Find a way to simultaneously expand parking downtown, increase legal positions, and remove the Nuttings as owners of the Pirates.
- Downtown should be crown jewel of city, not homeless haven. St. Mary's red door attracts homeless, trouble. Drives away many people. Need to push out homeless, lower income and attract mid to upper income. Cleaner, safer, all around better downtown. Push out empty storefronts. Market Sq. is being fixed up for druggies, homeless, etc. Belgian blocks is a mistake (did not learn from previous Belgian blocks. Need full police station.
- I commend the people at PDP for their passion to help. However, us long time residents don't see "honest" dialogue about what is really going on. We see "hype" of the market sq- meanwhile 1902, Ciao Baby closed & we see the huge # of vacancies still. Retail is dead, Lazarus and Lord & T failed. When you have leadership you get success (ROSS PARK) Many self-employed are planning to leave. City govt. must focus on small business or the city will resemble Detroit in a few yrs.
- Regardless of what is offered in the city, without a change govt/tax structure/transportation/parking it will not succeed because its structure DOES NOT promote/incentivize/ encourage/support/draw businesses/new residents/visitors into the city. It actually pushes them away & causes their failure as evidenced by the number of businesses/retailers/residents that have left the city.
- you need a food store in order to have people live in the city. more department stores.
- I am thrilled to rent now and own by end of year in the Strip District. Would love to see an expanded Wine & Spirits store in Strip. Need Hair Salon/ Massage etc near strip (walkable). Nail salon. Hardware store!
- would like to see riverparc between 7th and ninth get back on track
- I would like to see more benches along the sidewalks for people to sit down. I don't mind if bums sleep on them, I just need places to sit down to rest my back. You've managed to take away all the places in Market Square and the nearby area, so now I don't go through there any more.

FINAL COMMENTS - 2

- we go out of our way for a [grocery] store that is nicer, cleaner and offers more variety. DT needs many more available taxis.
- The only thing lacking in town is a good grocery store, not like the overpriced one that just closed on 7th Street. We need meat and produce -- the rest we can get at the drug stores.
- If we had a grocery store on the Hill, that would be SUPER!
- I love Whole Foods. I think the clientele that they target perfectly suits the residents of downtown.
- I feel, along with others i know who live in the downtown area, a Walmart Super Center would greatly improve development and express the true convenience of Downtown living.
- We need cinema, grocery stores or corner stores, dry cleaners, and other "living" services!!! I would like to see a movie theater DT. This may become less of an issue as I continue to utilize the buses.
- Please help with the parking situation - it is awful.
- It is unbelievable that monthly pkg rate is $175 @ Chatham Tower and >$5 for 1-2 hours. I park at Duq U's Locuat garage and pay per semester, which comes to about $80/month. I drive to Ross Park every day for my evening job - cheaper to just pay for parking at Duq U.
- It is an insult to have to pay for parking DT where I would easily spend >$50,000 per year on entertainment/shopping. I believe this would bring in more visitors and highly increase the influx of high end stores, restaurant chains. And bring Bloomingdales to town. There are other options to spend $ at that have free parking in the Pgh area.
- It's impossible to park my rental car in a garage in or near the theater district Fri or Sat evenings. Sometimes Thursday and Sunday evenings too.
- If school buses can park on Penn Ave as long as they want to, why can't we have at least 15 or 20 minutes to do what we need to do for this length of time?
- I have to pay for parking. Taxi service is very poor for the city if not going to airport.
- I'd appreciate a convenient way for guests to park. It is sometimes embarrassing when there is an event at the arena (I live in Chatham Towers) and I can't have guests.
- Downtown is coming along, but I would love to see the "T" extended elsewhere in the city! That would open the golden triangle to college students, Shadyside, Squirrel Hill, Lawrenceville, etc. A major reason people don't spend a lot of time downtown is that they fear parking. Stop talking about it and start extending "non bus" transit!
- more frequent trash pickup/street sweeping on access roads/streets into city, eg Crosstown Blvd, Blvd of Allies; trim weeds and overgrowth along Bigelow Blvd; more trees, planters and better maintenance of same, as well as green spaces.
- a little green space would be great. why were all the trees on Penn Avenue cut down?
- Penn Ave. between 22nd and 16th Streets should be shut down on Saturday and Sunday. If you really wanted to make it nice, you would shut it down permanently and brick it and plant trees.

FINAL COMMENTS - 3

- Unless there is upgraded policing of Mkt Sq it is the same old square, only upscaled. The atmosphere of eating establishments are beer and alcohol centered. It is one place I avoid in spite of all the money spent to "beautify" it.
- Market Square should be a pedestrian zone. I will not patronize Mkt Sq because of the cars. Why should Point Park be closed for so long for renovations?
- Cars in Market Square is waste of a Downtown resource. Cars in the square creates safety problem as there are no solid dividers separating the sidewalk and the road. It will be possible to actually drive a car between the Square and Fourth Ave. Deliveries to businesses could be scheduled in the morning. This unique Downtown spaced should be reserved for the use of people not parking. If New York City can keep cars out of part of Time Square can't the Pittsburgh do the same for Market Square?
- Urban areas are simply not compatible with automobile traffic. Lately there have been muggings at the North Shore Giant.
- Really, really like the Harris Theater but afraid to walk home on bridge at night.
- Please do something about the safety between DT/Uptown. I get harassed a lot by men walking to class. I was even harassed by a group of students on schl bus that belonged to an alternative academy. Because of this, I am considering moving. The civility is non-existent among some of the classes here; and being a minority, it is disgusting to have other min Am citizens treat me w/such degrading comments.
- We need a police officer to watch this apt. complex (Midtown Tower, especially on the weekend and the summertime. It gets really scary here. There are a lot of drug people who live here. A lot of those living here are not on the lease. They hang out in front of Midtown Tower and 7-11 Store. This is bad business. Also in the park between Midtown Tower and Dominion Tower. So much go on in the parks.
- would like to see a little more visible police presence DT (old fashioned "beat" walking)
- we should have more visible police patrols walking the Penn, Liberty, 7th, 9th Street area
- suggestion: more police presence such as beat cops on foot or bicycle
- nicer policemen would be a big improvement
- need police security on Liberty Ave. need new sidewalks on Liberty Ave. and in the Strip District.
- Bring Back Safety Ambassador program. Definitely made a difference.
- I appreciate all of the new progress being made in making Downtown a better, less "ghetto" place. More should be done about these trashy, un-educated people who shout to each other from across the street, and loiter outside of every place that doesn't have the time to get rid of them. These people are always trying to find new ways to be rude, ignorant, and obnoxious, and it's bringing Pittsburgh's image down significantly. More high-end stores will help to push them out of downtown.

FINAL COMMENTS - 4

- Keep up the great work! I follow you on Facebook and Twitter and appreciate your efforts to update the rest of the city about what is going on downtown. I would like to see more weekend and weeknight events like concerts, block parties or festivals that provide an opportunity for downtown residents and also their guests as that helps further your (and our) efforts to promote downtown living.
- I am too old for the bar scene, but if there were some events that catered to the 45 plus age group that would be a major plus. I really do not want to move to Florida to find an older singles crowd. People like myself have the disposal income and if you could tap into this group it could be a big surprise. Perhaps an old fashioned record hop type of gathering is appropriate. The hard part is getting women of this age out of their safe environs.
- social events need better advertising
- This survey made me realize although we go out to eat a lot, almost never Downtown. I would suggest more advertising and maybe incentives.
- need more going on DT on weekends - more business on weekends
- My favorite neighborhood activities are (1) during the day, (2) involve accomplishing something with other people, not just talking.
- I wish stores/restaurants were open later. Also, the construction is really pissing me off. Other than that i love living downtown. Its convenient and the girls totally dig it.
- We truly love living down town and enjoy the improvements the downtown is striving to make. If there were more downtown living areas where young people lived, as well as additional places to go out / eat dinner / and meet with others, it would greatly help the downtown environment. When things close at 7pm on weekends it is hard to create that sense of 'wanting' to live down town.
- The only thing I find very complicated about Pittsburgh is lack of Taxis. I don't understand it!
- better taxi service - more cabs
- Better cab system!! A must if you expect people to pay $250 K for a condo downtown.
- Transportation is a hassle. How about a Strip District-Downtown shuttle.
- My biggest complaint is lack of light rail transit to nearby communities, Oakland, South Side, North Side (other than stadiums, which the new spur will serve, eventually).
- I don't think ZipCar has a location in the Strip. Our cars are paid off so ZipCar isn't as attractive of a deal. Still need to drive on weekends since public transportation sucks here.
- ZipCar locations are not sufficiently convenient
- I think the PDP does a great job. I love ZIpcar and am a "charter member". I sold my car 2 years ago and have never missed it.
- Zipcar is fine, but often fellow users are inconsiderate making getting around difficult at times.

FINAL COMMENTS - 5

- Macy's has ruined the Tic-Toc. Get rid of Macy's. No one likes their clothes/food. Do not listen to their customers. Awful! Library is too small. Just a "token."
- what are they going to do with the mellon arena? you guys definitely should consider some type of grocery store in downtown
- Please please let's reuse the igloo so as not to lose this unique structure and all its memories...I find downtown living easy and accessible and especially delightful as we are on KDKA radio fri midnight to 3 am and sat midnight to 3 am and even driving back in the snow at that time of "morning" is a breeze...
- we need more condos on the view river areas. owners of property make a commitment. we spend money.
- why are only developer owned properties shown on walk around Pgh night?
- I would like to live at my previous address but it was sold and is occupied. I prefer a more residential area.
- I think outside building inspectors should come in. Some windows outside are badly rotted.
- would like a place to wash and wax my car/ would like to be able to put a dust cover on my car but our garage is valet
- Things need to be more available on weekends for downtown residents. We moved from a very happening downtown to this, and are very disappointed. We did only need one car and we were able to walk/bike everywhere is DC. I am not happy with my move to downtown Pittsburgh.
- We see continuous improvement Downtown -- buildings, walkways, streets, events, etc. We love living Downtown.
- Living downtown is wonderful and I am grateful for all the work that has gone into improving livability.
- Great city to live downtown in!
- Arrange a meeting downtown to discuss this with downtown residents--many of us are interested in promoting Pittsburgh. Don't want this to be a "flash in the pan"--we want it to take off!!!! and for a long time.
- would like to see results of survey
- Survey is a great idea. I love to see the improvements and changes to the area - such as the path in front of the convention center, new hotels on the North Shore, the casino, Fairmont Hotel, Piatt Place and new businesses. I think Lincoln at North Shore is the best place to live! I look forward to the improvement of the areas between Downtown and Oakland. The North Side could also use a facelift. Let me know what I can do to help! Tracy Weigand 773-220-2482 tracylynnweigand@gmail.com
- Could you please make the survey results available. I would like to see where people grocery shop and dine, and the results, etc. Thanks!
- I would like to receive the newsletter
- I am looking to purchase a place in the Downtown area. How do I find a list of Apartments or Lofts for sale?

FINAL COMMENTS - 6

- Thanks for all that you do.
- thank you for all that you do.
- PDP is doing a great job in making Downtown a true residential neighborhood
- Keep up the great work!
- Keep up the great work

COMMENTS ADDED THROUGHOUT THE SURVEY

- Q10 – Negatives : Realtor should be obligated to: Tell prospective buyer of new renovations to be made; the total amounts and the % assessed to specific units before they (buyer) make a decision. No one likes surprises.
- Q15 - Discontinue Arts Festival downtown! Over the years it's gone downhill. Getting thru the crowds is dangerous. Most of the people disregard any manners/courtesies ever taught them! Turn that thrill over to suburbia – the taxes, the noise and the filth.
- Q17 - dog park: Not likely only because the Pennsylvanian won't allow dogs (I wish they would). For dog owners, I think it's a great idea!
- Q17 – Dog park : Why add additional taxes to DT owners? Additional poop and disease? More often than not the pet owners do not clean up.
- Q18 - events: wheelchair accessibility is important with any event. re Q22 - transportation: taxi service sucks!
- Q20 – Harris Theater : A new cinema would give new and older downtowners something to look forward to. New buildings are almost completed; not only for purchase, but leased/rentals. Why must we commute? We don't have grocery store so why not a cinema?
- Q20 – Harris Theater: Reluctant to go there, knowing its history … ick!! Admirable they are trying to revitalize. Maybe if they remodeled and replaced the seats.
- Q23 – Parking: Sorry, no constructive ideas, but no one wants to have to park on the 7th floor of a parking garage just to run into the drug store.
- Q25 – re privatizing public parking facilities: I don't understand the implications of this question.
- Q25 - against privatization

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PITTSBURGH DOWNTOWN PARTNERSHIP

PRIZM$_{ne}$

HOUSEHOLD PROFILES

14 SOCIAL GROUPS = 66 SEGMENTS

U1 – Urban Uptown
04 Young Digerati
07 Money & Brains
16 Bohemian Mix
26 The Cosmopolitans
29 American Dreams

U2 – Midtown Mix
31 Urban Achievers
40 Close-In Couples
54 Multi-Culti Mosaic

U3 – Urban Cores
59 Urban Elders
61 City Roots
65 Big City Blues
66 Low-Rise Living

S1 – Elite Suburbs
01 Upper Crust
02 Blue Blood Estates
03 Movers & Shakers
06 Winner's Circle

S2 – The Affluentials
08 Executive Suites
14 New Empty Nests
15 Pools & Patios
17 Beltway Boomers
18 Kids & Cul-de-Sacs
19 Home Sweet Home

S3 – Middleburbs
21 Gray Power
22 Young Influentials
30 Suburban Sprawl
36 Blue-Chip Blues
39 Domestic Duos

S4 – Inner Suburbs
44 New Beginnings
46 Old Glories
49 American Classics
52 Suburban Pioneers

C1 – Second City Society
10 Second City Elite
12 Brite Lites, Li'l City
13 Upward Bound

C2 – City Centers
24 Up-and-Comers
27 Middleburg Managers
34 White Picket Fences
35 Boomtown Singles
41 Sunset City Blues

C3 – Micro-City Blues
47 City Startups
53 Mobility Blues
60 Park Bench Seniors
62 Hometown Retired
63 Family Thrifts

T1 – Landed Gentry
05 Country Squires
09 Big Fish, Small Pond
11 God's Country
20 Fast-Track Families
25 Country Casuals

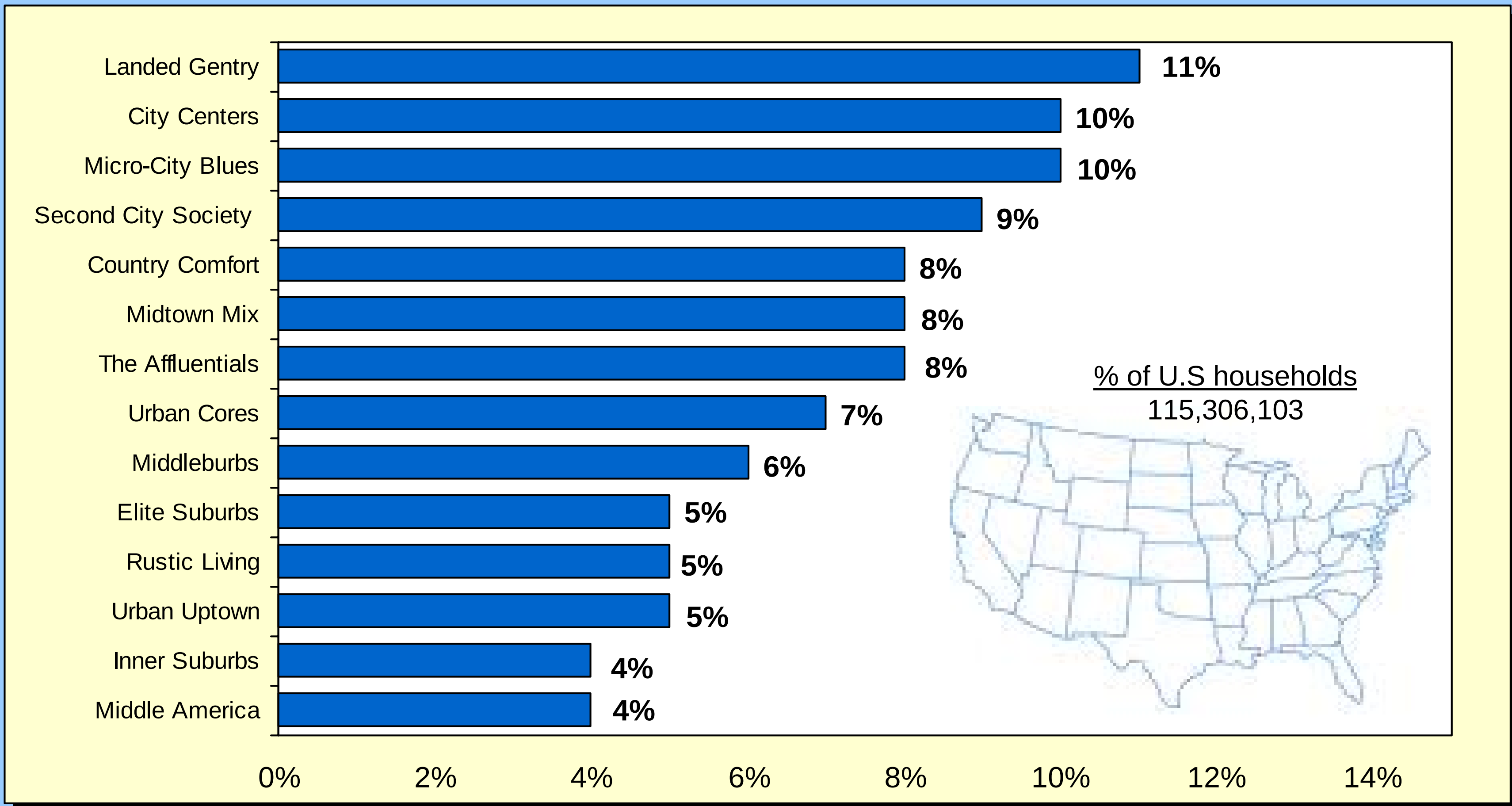
T2 – Country Comfort
23 Greenbelt Sports
28 Traditional Times
32 New Homesteaders
33 Big Sky Families
37 Mayberry-ville

T3 – Middle America
38 Simple Pleasures
42 Red, White & Blues
43 Heartlanders
45 Blue Highways
50 Kid Country, USA
51 Shotguns & Pickups

T4 – Rustic Living
48 Young & Rustic
55 Golden Ponds
56 Crossroads Villagers
57 Old Milltowns
58 Back Country Folks
64 Bedrock America

98

PRIZM SOCIAL GROUP PROFILE
- U.S. HOUSEHOLDS -



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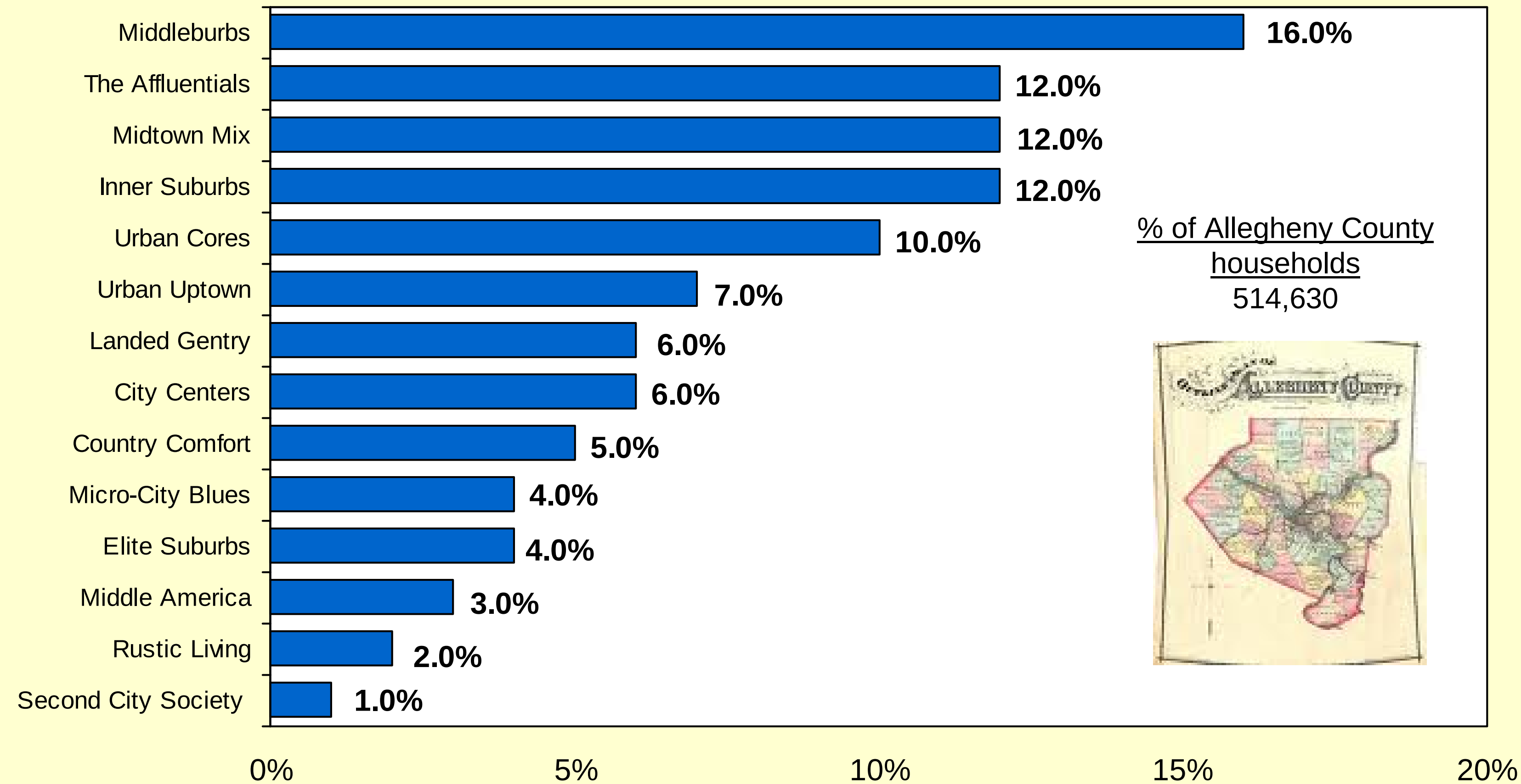
PRIZM SOCIAL GROUP PROFILE
- ALLEGHENY COUNTY HOUSEHOLDS -



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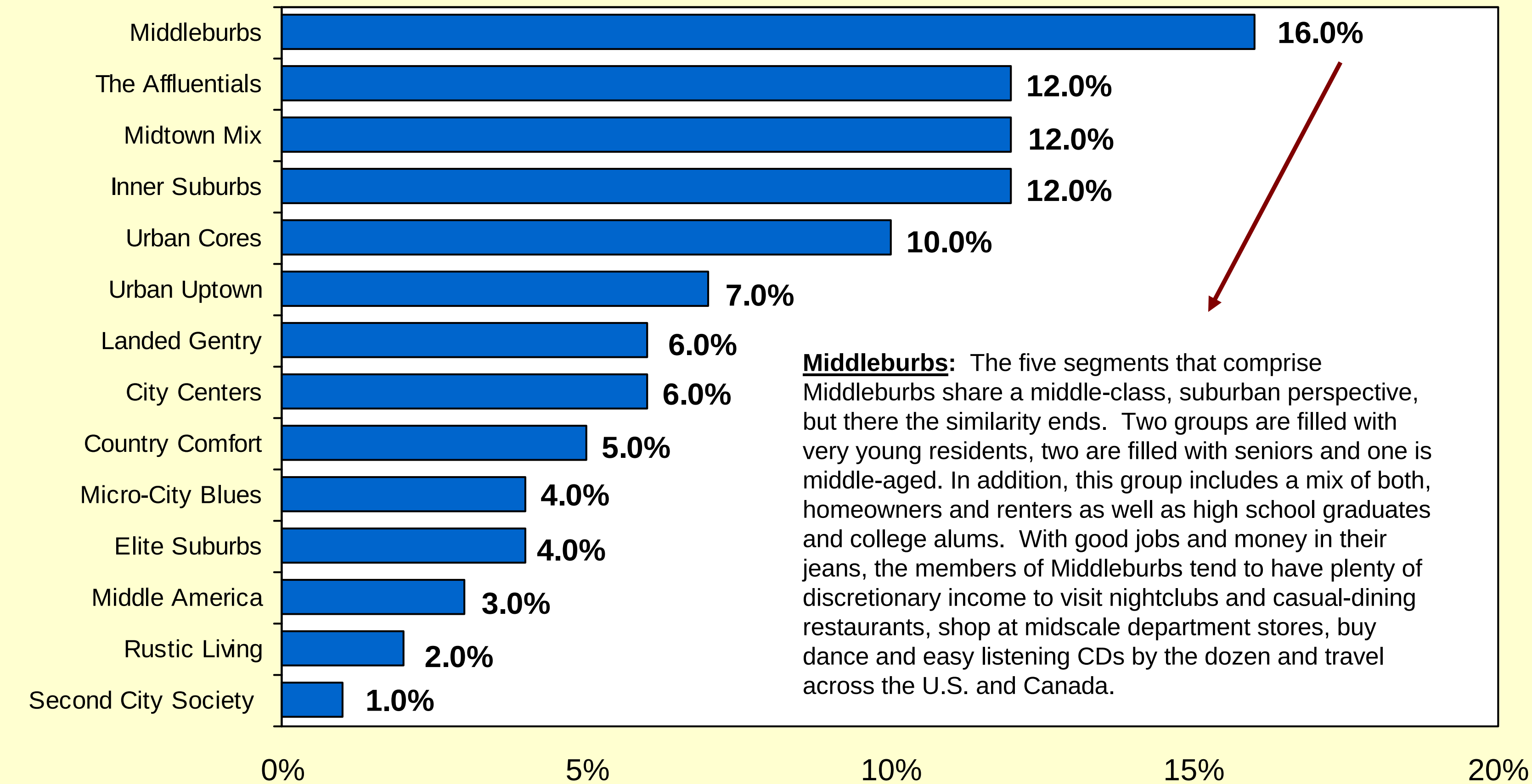
PITTSBURGH DOWNTOWN PARTNERSHIP

PRIZM SOCIAL GROUP PROFILE
- ALLEGHENY COUNTY HOUSEHOLDS -



Middleburbs: The five segments that comprise Middleburbs share a middle-class, suburban perspective, but there the similarity ends. Two groups are filled with very young residents, two are filled with seniors and one is middle-aged. In addition, this group includes a mix of both, homeowners and renters as well as high school graduates and college alums. With good jobs and money in their jeans, the members of Middleburbs tend to have plenty of discretionary income to visit nightclubs and casual-dining restaurants, shop at midscale department stores, buy dance and easy listening CDs by the dozen and travel across the U.S. and Canada.

SOCIAL GROUP DESCRIPTIONS

Elite Suburbs: The most affluent suburban social group, Elite Suburbs is a world of six-figure incomes, post-graduate degrees, single-family homes and managerial and professional occupations. The segments here are predominantly white with significant concentrations of well-off Asian Americans. Befitting their lofty salaries, members are big consumers of large homes, expensive clothes, luxury cars and foreign travel. Despite representing a small portion of the U.S. population, they hold a large share of the nation's personal net worth.

The Affluentials: The six segments in The Affluentials are one socioeconomic rung down from the Elite Suburbs—with a 25 percent drop in median income—but their residents still enjoy comfortable, suburban lifestyles. The median income is nearly $60,000, the median home value is about $200,000, and the mostly couples in this social group tend to have college degrees and white-collar jobs. Asian Americans make up an important minority in these predominantly white segments. As consumers, The Affluentials are big fans of health foods, computer equipment, consumer electronics and the full range of big-box retailers.

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Inner Suburbs: The four segments in the Inner Suburbs social group are concentrated in the inner-ring suburbs of major metros—areas where residents tend to be high school educated, unmarried and lower-middle class. There's diversity in this group, with segments that are racially mixed, divided evenly between homeowners and renters and filled with households that are either young or aging in place. However, the consumer behavior of the segments are dominated by older Americans who enjoy social activities at veterans clubs and fraternal orders, TV news and talk shows, and shopping at discount department stores.

Second City Society: Among second-tier cities, Second City Society stands at the top of the heap, a social group consisting of the wealthiest families who live outside the nation's metropolitan core. The three segments in this group are dominated with married couples with children, college degrees, large homes, and executive jobs. Ethnically, the residents are predominantly white with above-average rates of Asian Americans. In the marketplace, they spend big on digital and wireless technology, business and cultural media, casual-dining restaurants, upscale retailers, foreign travel and luxury cars.

City Centers: The five segments in this social group consist of a mix of Americans—old and young, homeowners and renters, families and singles—who've settled in the nation's satellite cities. What they share is a middle-class status, some college educations and a lifestyle heavy on leisure and recreation. The members of City Centers tend to be big fans of home-centered activities: computer surfing, video renting, TV viewing and playing games and musical instruments. Outside their homes, they go to movies, museums and bowling alleys at high rates.

Micro-City Blues: Micro-City Blues was created via the predominantly downscale residents living in the affordable housing found throughout the nation's smaller cities. A diverse social group, these five segments contain a mix of old and young, singles and widowers, whites, African-Americans and Hispanics. Most of the workers hold blue-collar jobs—hence the name—and their marketplace behavior reflect the segments' varied lifestyles. This is one of the few social groups where consumers have a high index for video games and bingo, aerobic exercise and fishing, BET and the Country Music Network.

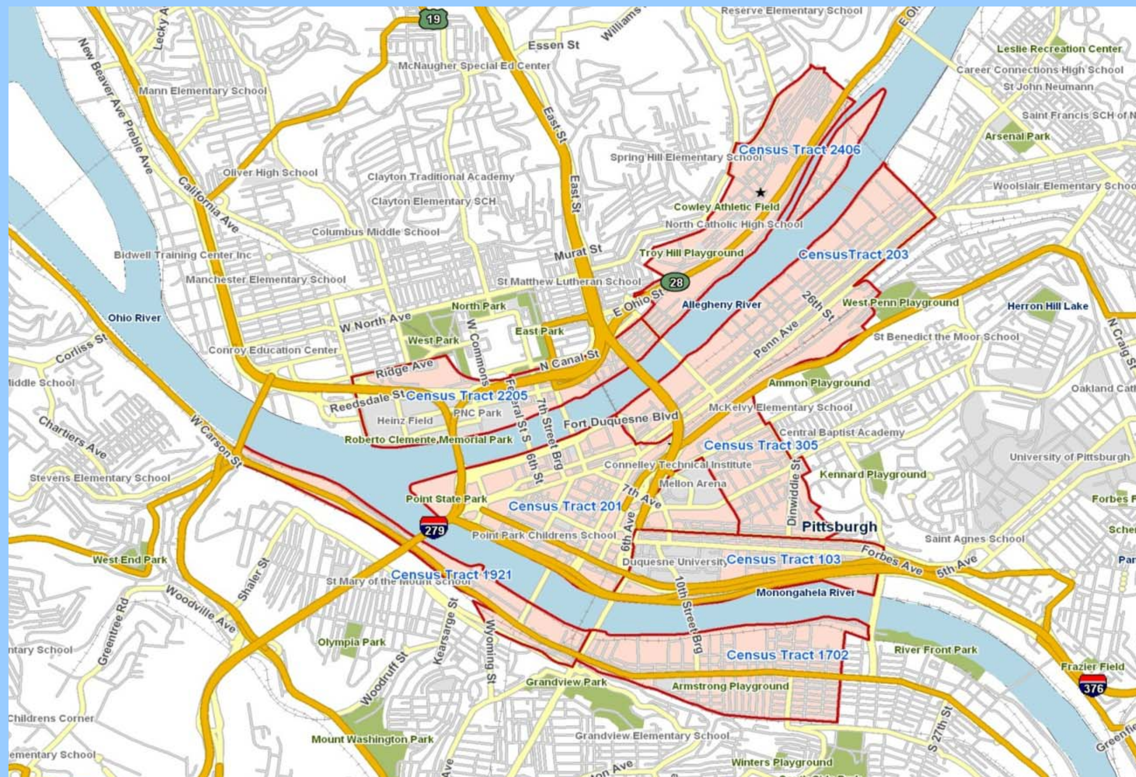
Landed Gentry: Widely scattered throughout the nation, the five segments in the Landed Gentry social group consist of wealthy Americans who migrated to the smaller boomtowns beyond the nation's beltways. Many of the households contain Boomer families and couples with college degrees, professional jobs—they're twice as likely as average Americans to telecommute—and expansive homes. With their upscale incomes, they can afford to spend heavily on consumer electronics, wireless and computer technology, luxury cars, powerboats, books and magazines, children's toys and exercise equipment.

Country Comfort: The five segments in Country Comfort are filled with predominantly white, middle-class homeowners. In their placid towns and scenic bedroom communities, these Americans tend to be married, between the ages of 25 and 54, with or without children. They enjoy comfortable upscale lifestyles, exhibiting high indices for barbecuing, bar-hopping and playing golf as well as home-based activities such as gardening, woodworking and crafts. Reflecting their rural, family environment, they prefer trucks, SUVs and minivans to cars. .

Middle America: The six segments in Middle America are filled with middle-class homeowners living in small towns and remote exurbs. Typically found in scenic settings throughout the nation's heartland, Middle Americans tend to be white, high school educated, living as couples or larger families, and ranging in age from under 25 to over 65. Like many residents of remote communities, these conservative consumers tend to prefer traditional rural pursuits: fishing, hunting, making crafts, antique collecting, watching television and meeting at civic and veterans clubs for recreation and companionship. Friday nights are for celebrating high school sports.

Rustic Living: The six segments in Rustic America represent the nation's most isolated towns and rural villages. As a group, these residents have relatively modest incomes, low educational levels, aging homes and blue-collar occupations. Many of the residents, a mix of young singles and seniors, are unmarried, and they've watched scores of their neighbors migrate to the city. In their remote communities, these consumers spend their leisure time in such traditional small-town activities as fishing and hunting, attending social activities at the local church and veterans club, enjoying country music and car racing.

DOWNTOWN: THE 8 CENSUS TRACTS



South Shore 1702 & 1921   North Shore 2205 & 2406   Uptown 0103
Uptown East 0305   Golden Triangle 0201   Strip District 0203

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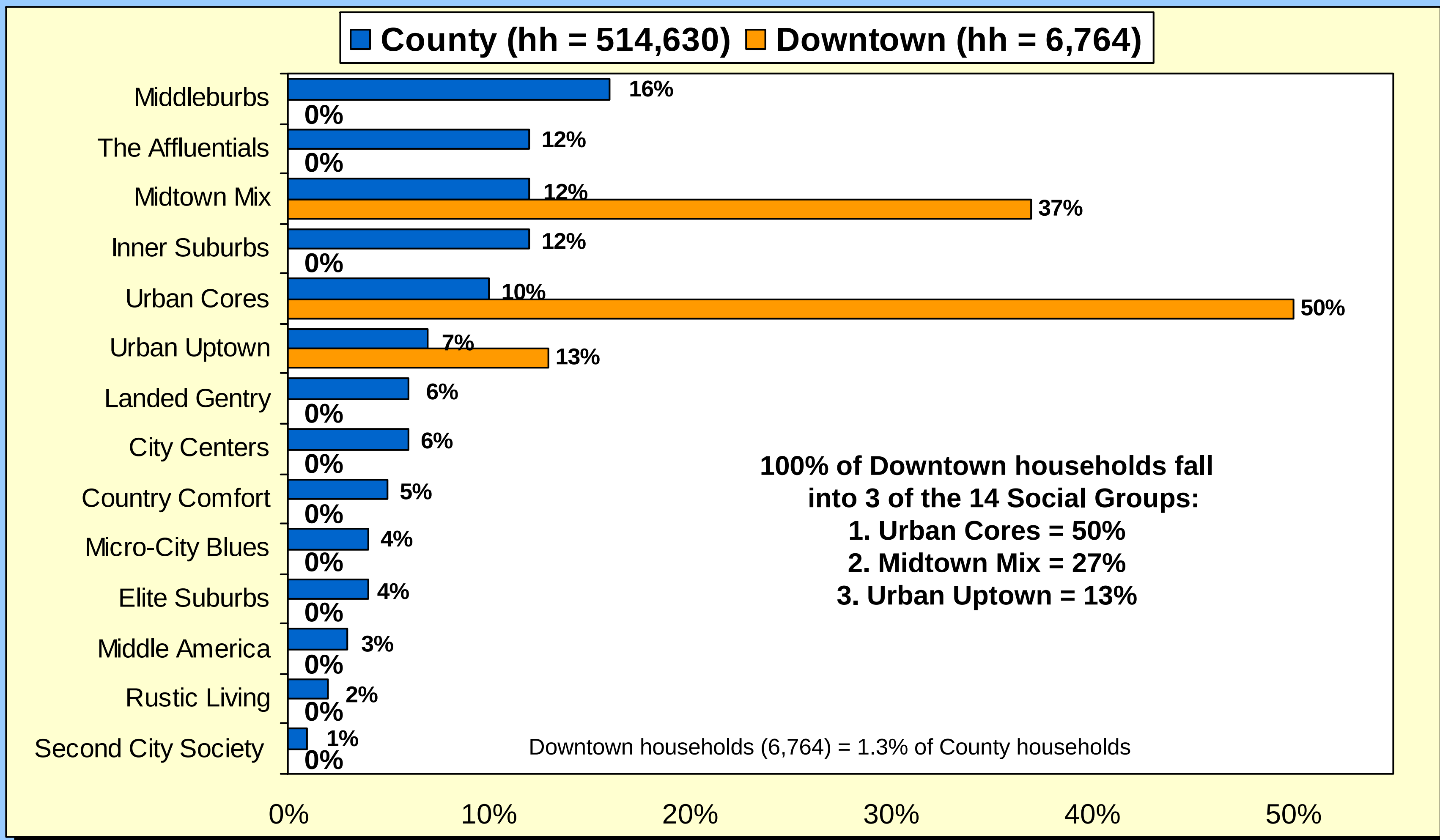
PITTSBURGH DOWNTOWN PARTNERSHIP

DOWNTOWN & AGH COUNTY
- SOCIAL GROUP PROFILES -



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PITTSBURGH DOWNTOWN PARTNERSHIP

DOWNTOWN & AGH COUNTY
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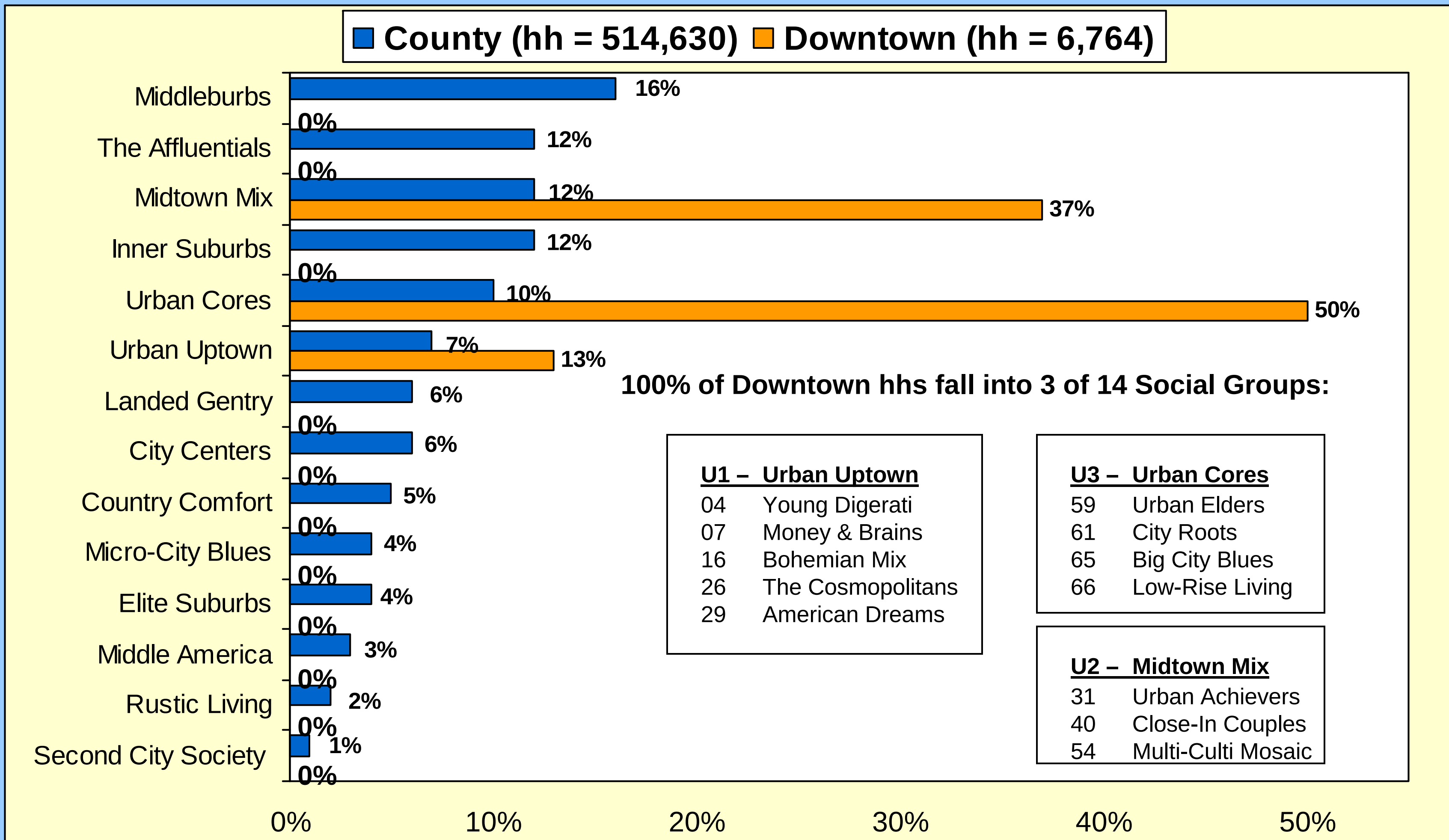

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PITTSBURGH DOWNTOWN PARTNERSHIP

DOWNTOWN SOCIAL GROUP PROFILES

Urban Cores - 50%

Urban Cores segments are characterized by relatively modest incomes, educations and rental apartments, but affordable housing is part of the allure for the group's young singles and aging retirees. One of the least affluent social groups, Urban Cores has a high concentration of Hispanics and African-Americans, and surveys indicate a fondness for both ethnic and mainstream media and products. Among the group's preferences: TV news and daytime programming, Spanish and black radio, telephony services and pagers, cheap fast food and high-end department stores.

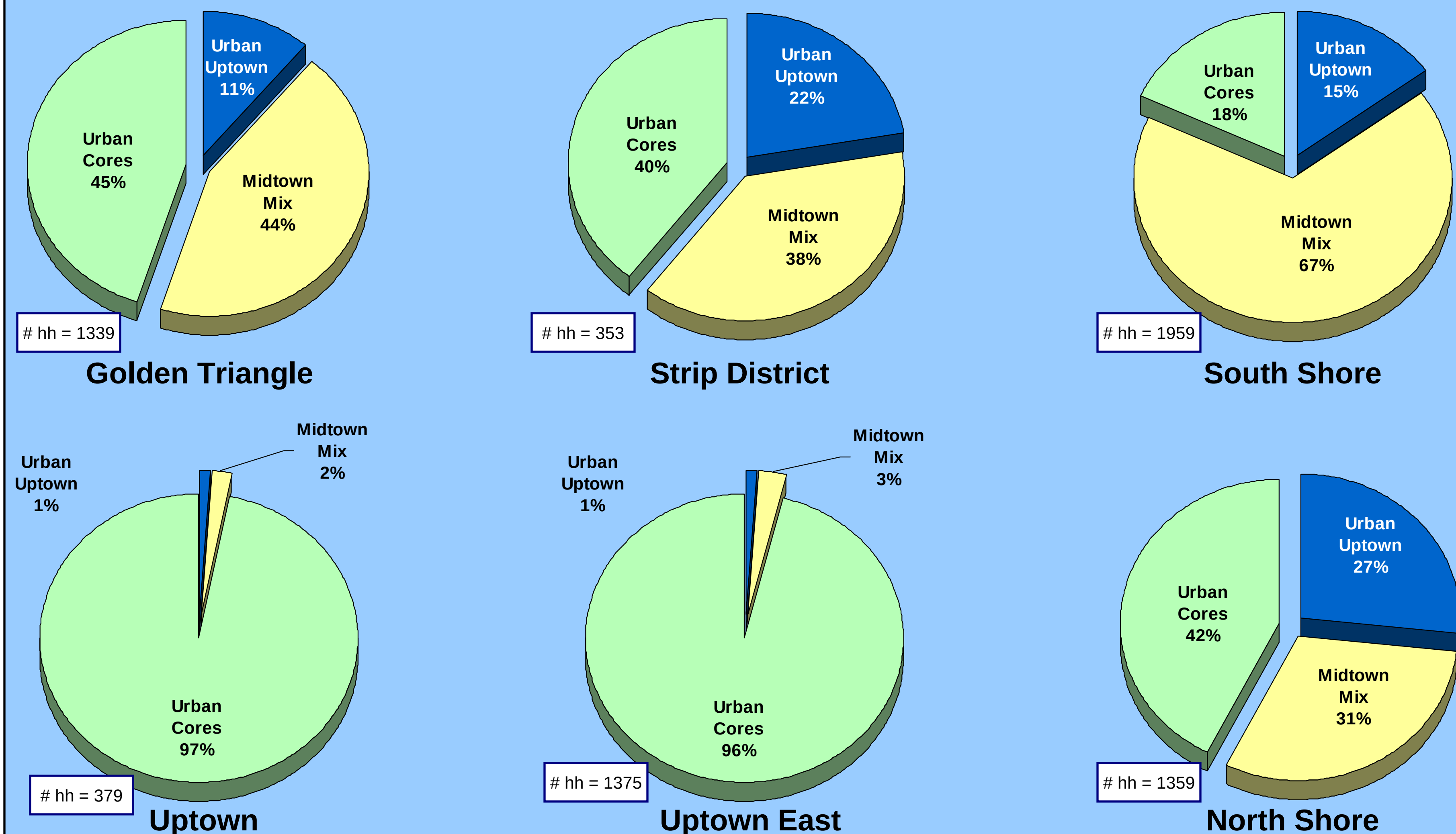
Midtown Mix – 37%

Diversity is the hallmark of Midtown Mix, a group of midscale urban segments. It's the most ethnically diverse social group, besides containing a mix of singles and couples, homeowners and renters, college alumnae and high school graduates. In Midtown Mix, the households are dominated by childless consumers who pursue active social lives—frequenting bars, health clubs and restaurants at high rates—listen to progressive music, drive small imports and acquire the latest consumer electronics.

Urban Uptown – 13%

The five segments in Urban Uptown are home to the nation's wealthiest urban consumers. Members of this social group tend to be affluent to middle class, college educated and ethnically diverse, with above-average concentrations of Asian and Hispanic Americans. Although this group is diverse in terms of housing styles and family sizes, residents share an upscale urban perspective that's reflected in their marketplace choices. Urban Uptown consumers tend to frequent the arts, shop at exclusive retailers, drive luxury imports, travel abroad and spend heavily on computer and wireless technology.

DOWNTOWN NEIGHBORHOOD COMPARISON
- SOCIAL GROUP PROFILES -



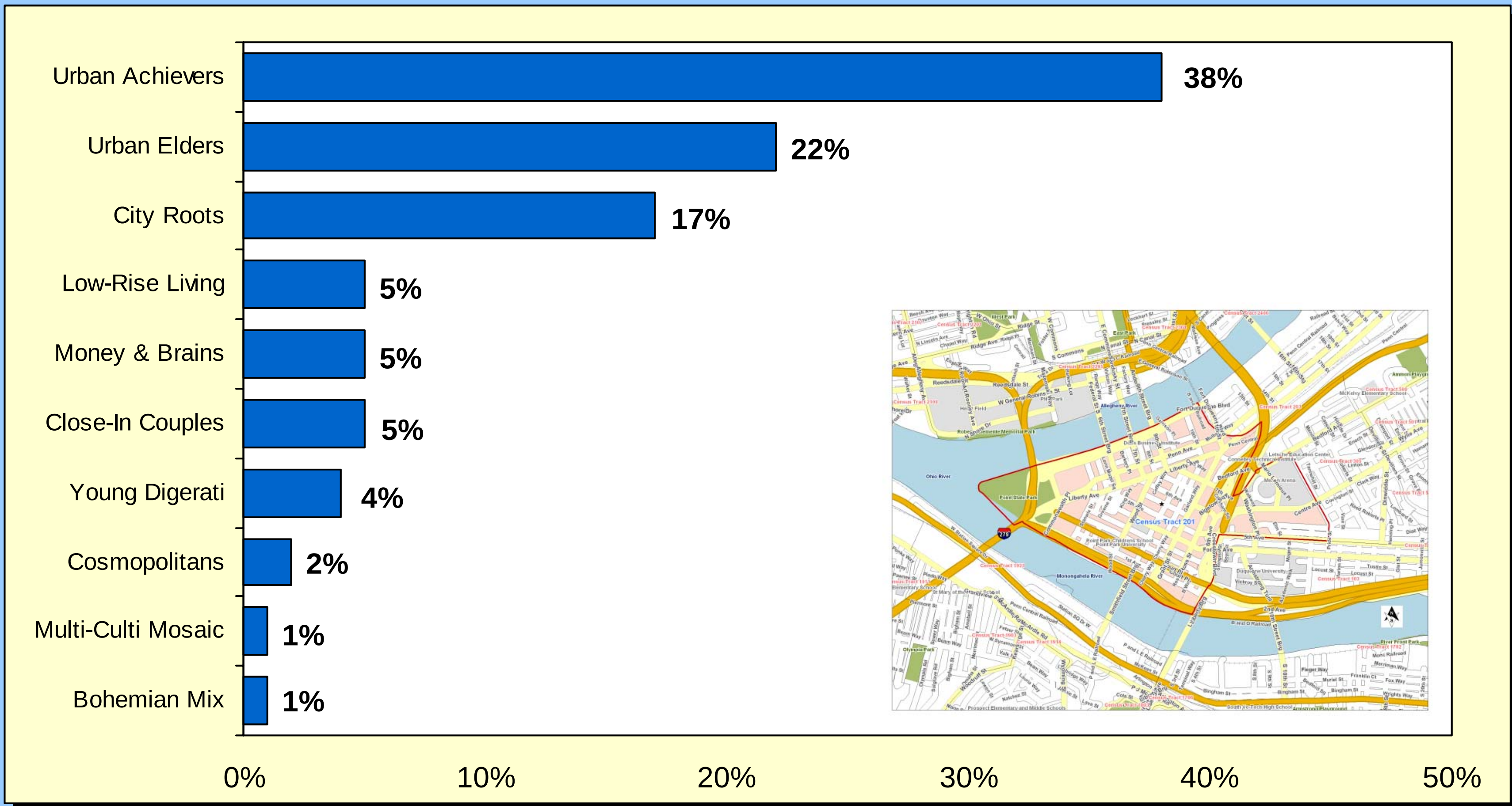
SOCIAL GROUP SUMMARY

- 100% of Each Social Group -

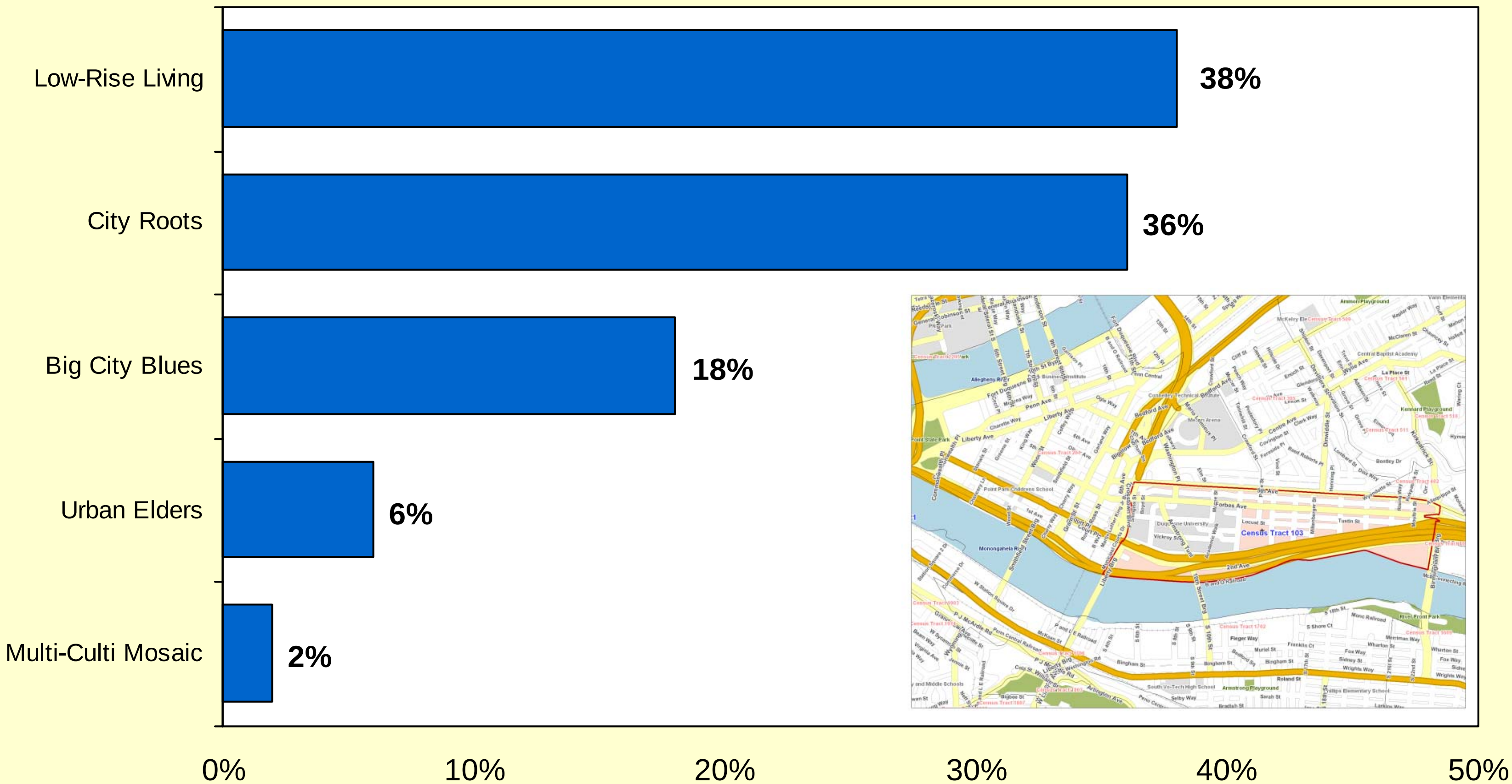
	Uptown	Golden Triangle	Strip District	Uptown East	South Shore	North Shore	Total
Urban Uptown	0.3%	16.8%	8.7%	1.9%	32.7%	39.6%	100%
Midtown Mix	0.3%	23.6%	5.4%	1.4%	52.7%	16.6%	100%
Urban Cores	11.0%	17.8%	4.1%	39.4%	10.3%	17.4%	100%
Total	5.6%	19.8%	5.2%	20.3%	29.0%	20.1%	100%

Some DT neighborhoods skew more heavily towards 1 of the 3 Social Groups:
South Shore = Midtown Mix (+24) North Shore = Urban Uptown (+19) Uptown East = Urabn Cores (+19)
Uptown is also over-represented by Urban Cores

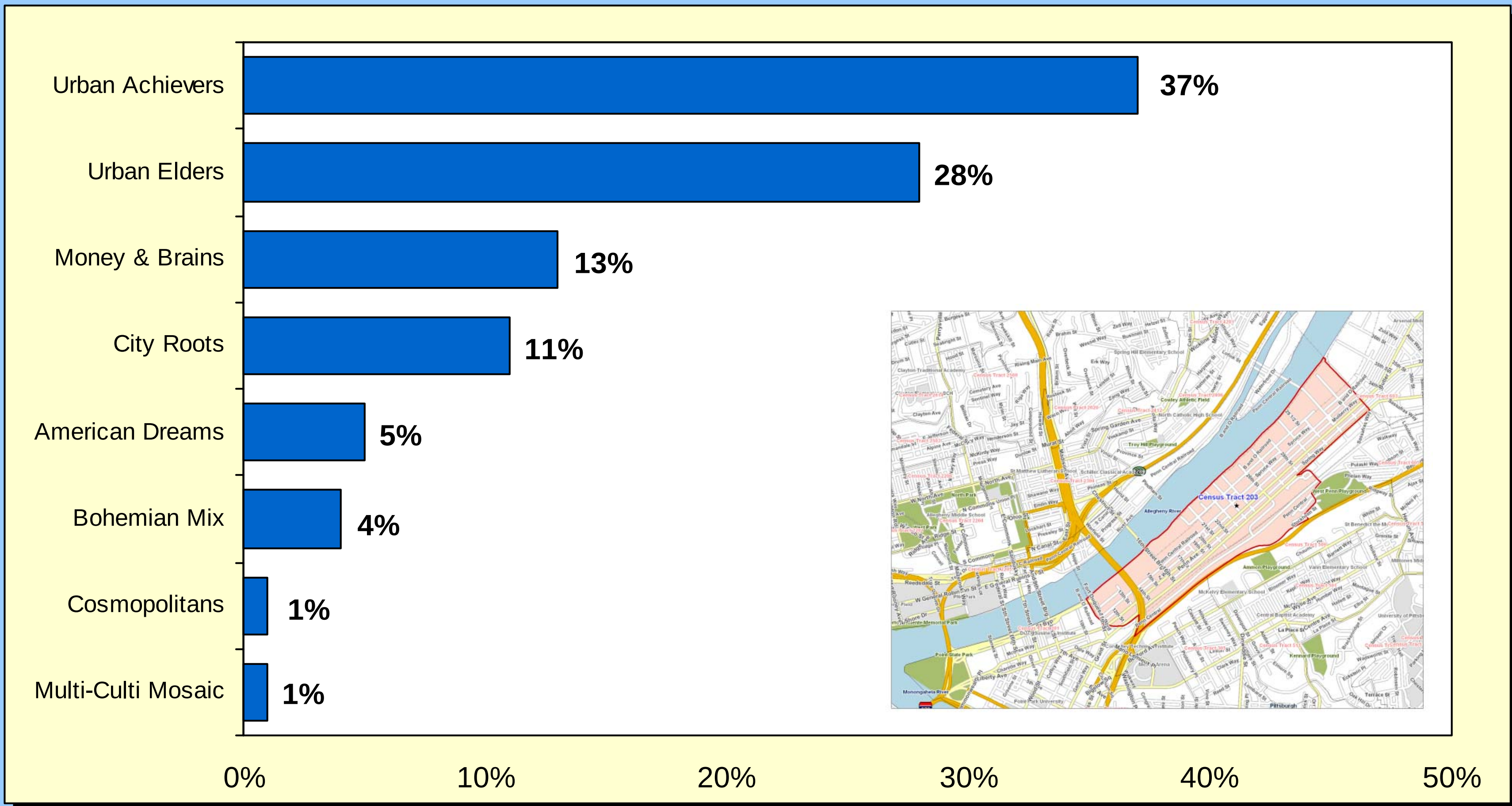
GOLDEN TRIANGLE PRIZM SEGMENTS



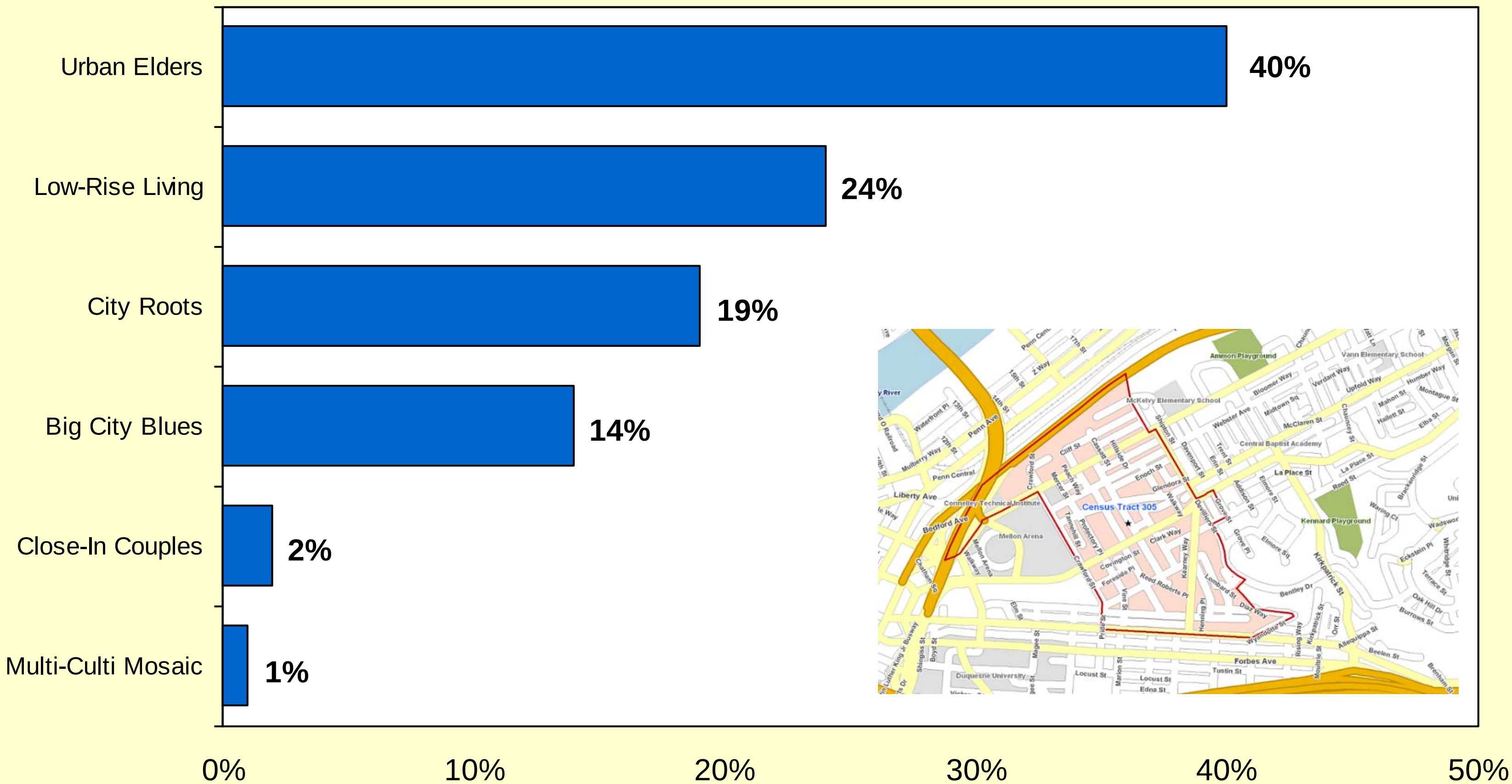
UPTOWN PRIZM SEGMENTS



STRIP DISTRICT PRIZM SEGMENTS



UPTOWN EAST PRIZM SEGMENTS



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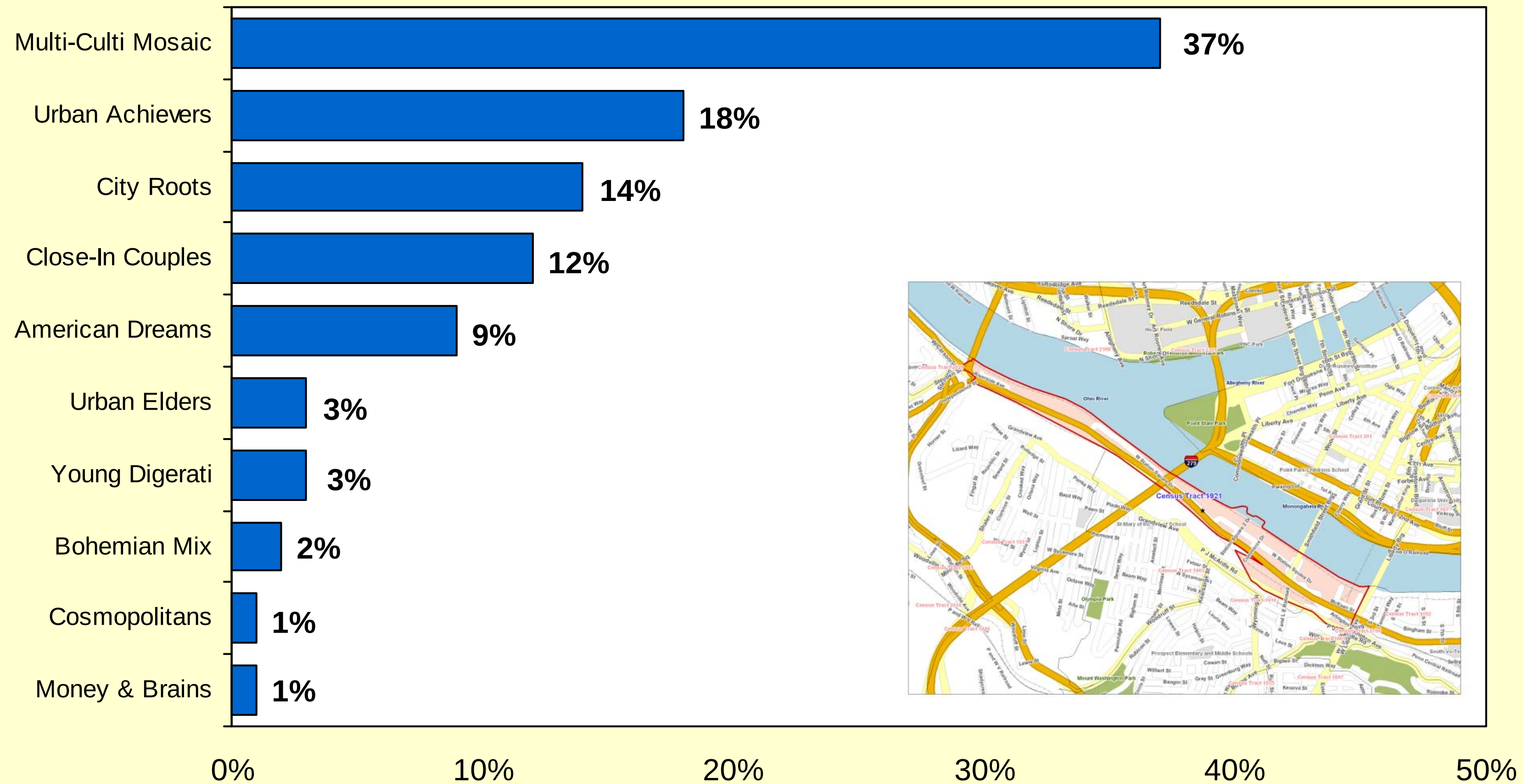
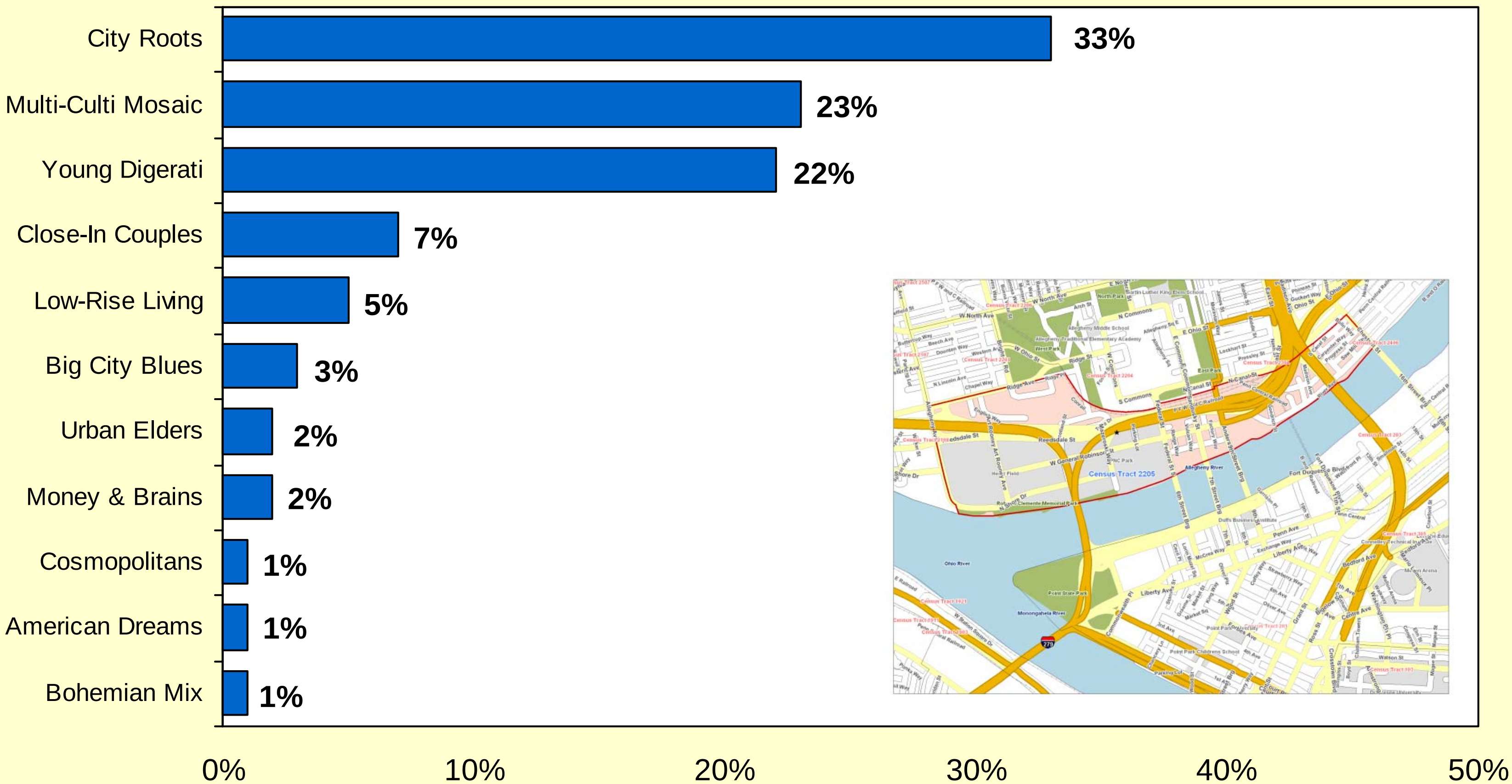
PITTSBURGH DOWNTOWN PARTNERSHIP

SOUTH SHORE PRIZM SEGMENTS



NORTH SHORE PRIZM SEGMENTS



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PITTSBURGH DOWNTOWN PARTNERSHIP

TOP 4 PRIZM SEGMENTS IN DOWNTOWN

61 City Roots

20.8%

Downscale, Mature Mostly w/o Kids

Found in urban neighborhoods, City Roots is a segment of downscale retirees, typically living in older homes and duplexes they've owned for years. In these ethnically diverse neighborhoods--more than a third are African-American or Hispanic--residents are often widows or widowers living on fixed incomes and maintaining low-key lifestyles.

Social Group: Urban Cores
Lifestage Group: Sustaining Seniors

2009 Statistics:
US Households: 1,317,434 (1.14%)
Median HH Income: $28,508

Lifestyle Traits:
1. Order from drugstore.com
2. Gamble in Reno, NV
3. Read Catholic Digest
4. Watch NAACP Image Awards
5. Chrysler 300

Demographics Traits:

Urbanicity:	Urban
Income:	Downscale
Income Producing Assets:	Below Avg.
Age Ranges:	65+
Presence of Kids:	Mostly w/o Kids
Homeownership:	Homeowners
Employment Levels:	Mostly Retired
Education Levels:	Some High School
Ethnic Diversity:	White, Black, Hispanic, Mix

54 Multi-Culti Mosaic

16.0%

Lower-Mid, Middle Age Family Mix

An immigrant gateway community, Multi-Culti Mosaic is the urban home for a mixed populace of Hispanic, Asian, and African-American singles and families. With nearly a quarter of the residents foreign born, this segment is a mecca for first-generation Americans who are striving to improve their lower-middle-class status.

Social Group: Midtown Mix
Lifestage Group: Mainstream Families

2009 Statistics:
US Households: 1,930,969 (1.67%)
Median HH Income: $36,087

Lifestyle Traits:
1. Shop at CVS Pharmacy
2. Buy Spanish/Latin music
3. Read Seventeen
4. Watch Premio Juventud
5. Volkswagen GLI

Demographics Traits:

Urbanicity:	Urban
Income:	Lower-Mid
Income Producing Assets:	Below Avg.
Age Ranges:	35-54
Presence of Kids:	Family Mix
Homeownership:	Homeowners
Employment Levels:	WC, Service, Mix
Education Levels:	Some College
Ethnic Diversity:	White, Black, Asian, Hispanic

59 Urban Elders

15.4%

Low Income, Older Mostly w/o Kids

For Urban Elders--a segment located in the downtown neighborhoods of such metros as New York, Chicago, Las Vegas, and Miami--life is often an economic struggle. These communities have high concentrations of Hispanics and African-Americans and tend to be downscale, with singles living in older apartment rentals.

Social Group: Urban Cores
Lifestage Group: Sustaining Seniors

2009 Statistics:
US Households: 1,508,629 (1.31%)
Median HH Income: $25,472

Lifestyle Traits:
1. Shop at Rite Aid
2. Domestic travel on JetBlue
3. Read Selecciones (RD)
4. Watch Primer Impacto
5. Ford Crown Victoria

Demographics Traits:

Urbanicity:	Urban
Income:	Low Income
Income Producing Assets:	Below Avg.
Age Ranges:	55+
Presence of Kids:	Mostly w/o Kids
Homeownership:	Renters
Employment Levels:	Mostly Retired
Education Levels:	Some High School
Ethnic Diversity:	White, Black, Asian, Hispanic

31 Urban Achievers

14.7%

Lower-Mid, Younger Family Mix

Concentrated in the nation's port cities, Urban Achievers is often the first stop for up-and-coming immigrants from Asia, South America, and Europe. These young singles, couples, and families are typically college-educated and ethnically diverse: about a third are foreign-born, and even more speak a language other than English.

Social Group: Midtown Mix
Lifestage Group: Young Achievers

2009 Statistics:
US Households: 1,730,092 (1.5%)
Median HH Income: $36,334

Lifestyle Traits:
1. Order from hotels.com
2. Play soccer
3. Read Latina
4. Watch Cristina
5. Volkswagen GTI

Demographics Traits:

Urbanicity:	Urban
Income:	Lower-Mid
Income Producing Assets:	Low
Age Ranges:	<35
Presence of Kids:	Family Mix
Homeownership:	Renters
Employment Levels:	White Collar, Mix
Education Levels:	Some College
Ethnic Diversity:	White, Black, Asian, Hispanic