WHO SHOPS DOWNTOWN, AND WHY?

OVERALL FINDINGS FROM
THE 1988 CITY OF PITTSBURGH HOLIDAY SURVEY OF
ALLEGHENY COUNTY RESIDENTS

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The use of straightforward graphics to accompany the many tables in this report was encouraged by all reviewers; but like the findings and conclusions, they are the sole responsibility of the principal investigator, who composed each one.

The final editing and layout of this report was done with the assistance of Roland Rogers, a graduate student researcher from the Urban and Regional Planning program at the Graduate School of Public and International Affairs.

Jim DeAngelis, AICP
August, 1989

EXECUTIVE SUMMARY: WHO SHOPS DOWNTOWN, AND WHY?

Purpose of the Survey

This scientifically conducted survey explored the consumer shopping patterns, preferences, and perceptions of a representative sample of Allegheny County residents with respect to Downtown Pittsburgh's CBD (Central Business District).

The primary objective of this survey was to determine how people were viewing CBD shopping. Accordingly, key elements of the survey encouraged respondents to compare shopping at either Monroeville Mall, South Hills Village, Ross Park Mall, or Century III Mall with Downtown Pittsburgh. Other aspects of the survey explored respondents' reactions to potential Downtown improvements as well as special events.

Consumer Profile

Less than a third of the respondents were residents of the City of Pittsburgh. Approximately half of the respondents were employed persons. Of these, 15% worked at jobs located in the Downtown and another 29% worked at jobs located in the City but outside the Downtown.

Two thirds of all respondents, regardless of their employment status, reported that they had shopped in the Downtown Pittsburgh during the past five years. Over half had shopped downtown in the last year. A third of the respondents reported that the CBD was either their most or second most frequently used major retail center during the past year.

Merchandise Lines

Merchandise lines that are associated with traditional department stores -- apparel, jewelry, housewares, and home furnishings -- were explored. The finding was that a majority of this region's consumers continue to shop exclusively in department stores for clothing but that a plurality of them are shopping for other merchandise in specialty stores rather than discount stores. About a third of the respondents reported shopping for the most frequently bought items, clothing, in the CBD -- probably at department stores, which they rated better than branch stores at the suburban malls.

Consumer Shopping Behavior

People who reported shopping in the CBD within the last five years were classified as "CBD Shoppers". They differed in several respects form "Non CBD Shoppers".

> The most significant differences are that CBD Shoppers are younger and from higher income households than Non CBD Shoppers.
>
> Another difference is that over two thirds of the CBD shoppers consider Downtown shopping to be an enjoyable experience while over three quarters of Non CBD Shoppers do not consider Downtown shopping to be enjoyable.

Assessing Downtown Pittsburgh

When CBD Shoppers were invited to comment on Downtown shopping, 61% reported that it had improved during the past five years; however, only 27% reported that they were buying more at this time then they did five years ago.

Comparing Downtown Pittsburgh to the Malls

In comparing Downtown shopping to the malls, Downtown Shoppers rated the CBD's stores, the service in the stores, and the "prices, quality, & variety" of their merchandise as "the same" or "better" than stores in the malls. In addition over half of the CBD shoppers rate the CBD's "image & appearance" and "shopping in general" to be "the same" or "better" than the malls.

A majority of CBD Shoppers rated Safety & Security and two convenience factors [i.e., getting into and out of the district and getting from store to store to parking] as "better" at the malls.

Over half [60%] of the Downtown Shoppers reported that parking in the Downtown was a problem for them; the major types of parking problems were a "lack of spaces" and "expensive parking rates".

Best and Worst Aspects of Downtown

When Downtown Shoppers were invited to list the best and the worst aspects of Downtown shopping the top two attributes were "the variety of merchandise" and "the variety of stores". The two worst aspects were "parking difficulties" and "too much traffic congestion".

When Non Downtown Shoppers were invited to explain why they had not shopped in the Downtown in the last five years or ever, their list of reasons was longer. Their top reasons were the same as CBD Shoppers': "parking difficulties" and "too much traffic congestion". Various expressions about Downtown's not being "convenient for them" -- it was too far to travel -- constituted the other reasons.

CBD Improvements

Finally, respondents were invited to indicate whether, or to what degree, they would increase their Downtown shopping if certain improvements were made. Three of the seven proposed improvements were ranked highest:

> "Better Parking Arrangements; such as more spaces, easier to find garages, and cheaper rates for shoppers" [by 28% of respondents];
>
> "A New Indoor Shopping Mall similar to a large suburban shopping mall with free parking" [by 27% of respondents]; and
>
> "A New Really Nice Department Store like a large "New York" Saks Fifth Avenue or Bloomingdales or a Neiman - Marcus" [by 22% of respondents].

Essentially equal proportions of Non CBD Shoppers supported the top two improvements. However, a quarter of the Non CBD Shoppers said, **"nothing would get me to the Downtown to shop!"** These respondents, however, constituted only 8% of all respondents.

Special Events and Restaurant Use in Downtown Pittsburgh

About half the respondents explained that their shopping was a form of entertainment. In anticipation of this sentiment, respondents were asked how their use of the CBD for non shopping activities (including entertainment such as concerts or theme, civic and sporting events) influences their shopping and restaurant use.

Approximately one half of the respondents report attending CBD concerts (53%), sporting events (49%), and civic events (46%) in the year prior to the survey. The relatively high participation rate of respondents in special events that are held in the CBD is important to understand since increasing it can be complementary to more direct retail revitalization initiatives like those mentioned above.

> For example, half of the participants in civic events, like the Three Rivers Arts Festival and parades, reported eating at CBD restaurants and 27% reported shopping at CBD businesses as part of their attendance.

These types of events bring people to the CBD who might not otherwise visit it. Over a third of the "Non CBD Shoppers" report attending a special event in the CBD during the last year.

About 90% of the respondents go to a restaurant for dinner at least once a month and nearly half of these people report having dinner at a Downtown Pittsburgh restaurant during the last year.

<u>Conclusions for Consideration</u>

The city of Pittsburgh and CBD merchants should not take the Pittsburgh Downtown's central location and its traditional consumer and special event draws for granted; people are taking advantage of suburban malls -- they are not showing great loyalty to the CBD even though many acknowledge that shopping in the CBD has improved in the last five years. This includes CBD Workers -- whose shopping patterns, while favoring the CBD, are not unique; they shop like anyone else -- during non working hours at malls near their homes.

The Consumer's View

From consumers' points of view, the Pittsburgh Central Business District's retail activities are supported by shoppers that have had relatively recent experience there.

They say that the CBD is better today than it was five years ago; they appreciate the "flag ship" department stores; they see the shopping opportunities as the same or better than at competing suburban malls.

However, these shoppers report that they buy less in CBD stores now than they did five years ago. They do not like certain aspects of shopping in the CBD. In significant numbers these people are complaining about traffic, parking availability, and parking rates.

Indeed, they claim they would shop more in the CBD if significant and major improvements, such as those mentioned above, were made.

They want special shopping opportunities, convenience improvements, and better parking arrangements. These improvements must reduce the impediments to CBD shopping especially during those times that people claim to do their shopping; during none working hours, in the evenings and on the weekends.

With these improvements, the CBD Shoppers, as well as people who have not shopped in the CBD in five years, will shop "a lot more" in the CBD than they have been; they claim that they will react positively to improvements.

Further Analysis

This report contains more detailed information from the survey. A series of working papers will be responsive to specific questions that emerge from this report's discussion and activities that are related to the Fifth Avenue Square Retail Initiative.

WHO SHOPS DOWNTOWN, AND WHY?

TABLE OF CONTENTS

1 INTRODUCTION: PUBLIC POLICY OBJECTIVES

The University of Pittsburgh's Center for Social and Urban Research [UCSUR] was commissioned by the city of Pittsburgh's Department of City Planning to conduct a series of in depth residential telephone interviews with a scientifically selected and representative sample of 669 Allegheny County residents during November and December of 1988[1].

The purpose of this survey was to gain a better understanding of the consumer shopping patterns, preferences, and perceptions of people who lived within the primary trade area of the city of Pittsburgh's Central Business District [CBD], Allegheny County. This survey is, to the best of our knowledge, the most comprehensive attempt to achieve this objective.

On the basis of the insights gained through this survey and through interactions of the Department of City Planning [DCP] staff with merchants and others, it is hoped that public officials, real estate developers, merchants, and shoppers will have an improved basis for making choices about investments and shopping opportunities.

This survey is one element in a continuing effort by the Department of City Planning to improve understandings about the consumer shopping patterns that are associated with the city of Pittsburgh's Major Retail Centers and Neighborhood Commercial Districts.

This specific survey is part of the City's overall Fifth Avenue Square Retail Initiative. Other related research on this Initiative includes a recent survey of downtown merchants, an evaluation of national retailing trends and an examination of options for streetscape improvements. The Department of City Planning in consultation with downtown business interests who have a stake in fashioning a comprehensive strategy for downtown Pittsburgh is synthesizing the findings from these three resources to better inform their investment options. In the coming months a number of working papers will be forthcoming from this and related surveys.

This report provides an overview of survey findings based on an analysis of responses. These findings reflect as closely as possible the views of the respondents; the interpretations of these responses are those of the principal investigator. These interpretations or the actions they suggest do not necessarily reflect the views of the Department of City Planning or the policies of the city of Pittsburgh.

2 CONSUMER SHOPPING BEHAVIOR

In this chapter's first section a profile of Allegheny County shoppers is presented. This profile is based on the responses of Allegheny County residents to the interview that was administered during the late fall of 1988.

Understanding the socio economic and spatial characteristics of Allegheny County shoppers is a necessary but not sufficient basis for making reasoned judgments about revitalizing Downtown Pittsburgh's retail center. It is necessary to know the shopping behavior of these consumers. It is also necessary to know how these consumers buy certain types of merchandise, where they buy it, and what their Downtown Pittsburgh shopping experiences have been.

To measure these aspects of consumer shopping behavior respondents were invited to identify the frequency, types of stores, and general locations at which they shopped for specific types of merchandise. Findings from these inquiries are contained in Section 2.2.

Respondents were also invited to comment on what shopping meant to them and on their familiarity with Major Retail Centers [MRCs] throughout the metropolitan area. These findings are presented next.

By combining findings from these sorts of inquiries with the demographic characteristics that have been summarized in Section 2.1.2, it has been possible to define "The CBD Shopper". A profile of the CBD Shopper concludes this section of the report and sets the stage for reporting on the strengths and weaknesses of the Pittsburgh CBD.

2.1 PROFILE OF ALLEGHENY COUNTY SHOPPERS

This report presents findings from the overall responses of the 669 respondents. This profile describes these respondents and, within the limits of our sample size[2] [approximately ± 5%], the residents of Allegheny County. There are two types of characteristics that are important to understand as a basis for understanding shopping patterns, preferences, and perceptions: demographic and spatial.

2.1.1 DEMOGRAPHIC CHARACTERISTICS

Almost 90% of the respondents report residing in the Pittsburgh metropolitan area for ten or more years. It is estimated that 78% of the respondents were either born here or moved here before their twentieth birthday. It is reasonable to suspect that some shopping patterns are well established and may, therefore, be relatively slow to change. Sixty seven percent of the respondents were women[3]. As indicated in Table 2-1, almost a third of the respondents are between 30 and 45 years of age.

Table 2-1, Age Groups

Age Groups	Number of Respondents	[percentage]
15 - 19	65	[10%]
20 - 29	126	[19%]
30 - 45	214	[32%]
46 - 65	167	[25%]
OVER 65	93	[14%]
Valid Cases	665	[100%]

Over half [57%] of the respondents reported being married.

As indicated in Table 2-2, the clear majority [85%] of respondents are members of households with more than 2 people[4]. Indeed, households containing 3 or more people ["families"] were occupied by a majority of the respondents.

Table 2-2, Household Size

Persons	Number of Respondents [percentage]
ONE	96 [15%]
TWO	223 [34%]
3 or more	331 [51%]
Valid Cases	650 [100%]

Over half [55%] of the respondents report being in families where two or more people contribute to the family income. Table 2-3 reports the distribution of family income reported by respondents[5].

Table 2-3, Household Income

Income [$ 000s]	Number of Respondents [percentage]
< $15K	127 [20%]
$15 - 30K	240 [39%]
$30 - 60K	202 [33%]
OVER $60K	53 [8%]
Valid Cases	622 [100%]

The following additional findings highlight the demographic characteristics of the respondents to this survey:

> <u>Single person households</u> are disproportionately occupied by people over the age of 65; indeed, nearly half of the respondents who were at least 65 years old lived alone.
>
> <u>Low income households</u>, those in which income is below $15,000, are disproportionately concentrated in single person households; while 15% of the respondents live alone, over a third of the respondents with low incomes live alone. Over 63% of the low income respondents who live alone are over 65 years old.

Middle income households, those in which income is between $15,000 and $30,000, are proportionately distributed by household size and age.

Upper income households, those in which income exceeds $30,000, are found more frequently in households with two or more occupants and more than one wage earner.

Throughout this report these demographic findings are statistically tested against key findings about consumer behavior and opinion. In this fashion it is possible to identify groups of consumers who share shopping patterns or opinions -- and, of course those who do not.

When a demographic factor is found to be statistically significant, it is mentioned in the text or an endnote. If there is no mention of the factor, there has been no finding of statistical significance.

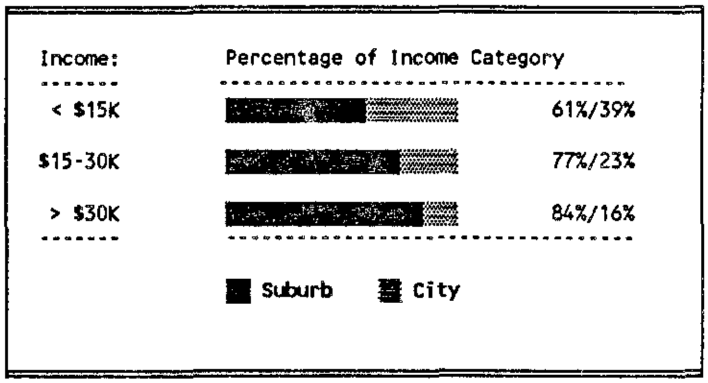
2.1.2 SPATIAL CHARACTERISTICS

Understanding the most likely places from which Allegheny County shoppers begin or end their shopping trips is very important to understanding where they do their shopping. Accordingly, a general description of respondent's spatial characteristics is presented. There are two places that are important: the residence and, for those who work, the work place.

2.1.2.1 Residential Locations

Over three quarters [77%] of the respondents reside in Allegheny County <u>outside</u> the City of Pittsburgh.

Table 2-4, Household Income Categories by Residential Location



Household income is the factor that distinguishes respondents who resided in the City from those living outside the City in the suburbs.

Table 2-4[*] demonstrates that there is a higher proportion of respondents from households with incomes under $15,000 with City residences than with suburban residences; almost 40% of the respondents with these incomes lived in the City.

There is also a lower proportion of respondents from households with incomes over $30,000 with City residences than with suburban residences. The proportions of City and suburban respondents who reported household incomes between $15,000 and $30,000 are essentially proportionate to the overall spatial pattern: three quarters in the suburbs, a quarter in the City.

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* **Suburb**, as used in this and subsequent tables, means an Allegheny County resident who is not a **"City"** of Pittsburgh resident.

2.1.2.2 Work Place Locations

During the last two decades the labor force participation rate for women in this region and throughout the country has increased. As mentioned earlier, over half of the respondents reported being in two earner [or more] households. The place to which people travel on a daily basis -- their work place location -- is a factor in shopping patterns that was explored in this survey[6].

Table 2-5, Labor Force Status

Status	Number of Respondents [Percentage]
EMPLOYED	356 [53%]
AT HOME	126 [19%]
RETIRED	114 [17%]
STUDENT	73 [11%]
Valid Cases	669 [100%]

The majority of respondents were employed persons. Table 2-5 presents the labor force status of the respondents in this survey.

The following tables analyze the spatial relationships between work place and residential locations.

Table 2-6, Work and Residence Locations

Work Place	Residences	Respondents [Percentage]	
Pittsburgh Downtown [CBD]	City	12 [21%]	
	Suburb	44 [79%]	15%
Elsewhere in Pittsburgh	City	56 [53%]	
	Suburb	49 [47%]	29%
Outside of Pittsburgh	City	23 [11%]	
	Suburb	185 [89%]	56%
	Valid Cases	369	100%

Table 2-6 shows that 15% of the respondents reported working in the city of Pittsburgh's Downtown; 79% were not City residents.

Another 29% reported having work places elsewhere in the City; the remaining 56% reported work places outside the City, essentially in Allegheny County.

Table 2-7 shows that 75% of the employed respondents live outside the City.

Table 2-7, Residence and Work Locations

Residence	Work Place	Respondents	[Percentage]	
City of Pittsburgh	CBD	12	[13%]	
	Pittsburgh	56	[62%]	
	Suburbs	23	[25%]	25%
Outside Pittsburgh	CBD	44	[16%]	
	Pittsburgh	49	[18%]	
	Suburbs	185	[66%]	75%
	Valid Cases	369		100%

It also shows that 75% of the City's employed residents work in the City (13% in the CBD and 62% elsewhere) and that 66% of the suburban employed residents work in the suburbs.

While 34% of these suburban residents have work places in the City, approximately three quarters of the employed City residents work in the City. Over 80% of these City residents work in the City outside the CBD. In fact this table shows that over half of the people with work place locations in the City but outside of the CBD are City residents.

These findings demonstrate that the CBD -- while very densely developed -- is not the place in which a majority of Allegheny County employed residents work; it is the work place for 15% of these employed persons[7]. It also shows that 79% of the CBD Workers are not City residents.

Later in this report the relationships between CBD Shopping, residential location, and work place location -- particularly CBD Workers -- will be discussed.

2.2 MERCHANDISE LINES

Merchandise lines were identified that, according to standards of retailing market analysis, would have been traditionally associated with the "downtown" full line department stores that predated the branching and suburbanization of retailing. We were especially interested in these types of merchandise because the downtown Pittsburgh retail center had, and to some extent continues to have, a reputation as the center of a "department store buying market".

The merchandise lines of interest also have the characteristic of being items for which people comparison shop. People need to see, and sometimes try on or sit in, this type of merchandise. We also recognized that some of the merchandise lines were more frequently sought than others. For example, people do not shop as frequently for furniture as they do for clothing.

The merchandise lines were in two basic categories: soft goods such as garments and related apparel and household goods such as home furnishings and equipment.

Interviewers were instructed to use the following statement for each of the ten lines of merchandise that were tested:

> **"Now, I am going to ask you about merchandise that people shop for regularly. I would like you to first tell me whether you have bought this type of merchandise during the last year; then if you have; how often do you shop for this item; whether you shop for this at a traditional department store, a discount department store or a specialty shop; and finally if you ever shop for this in Downtown or Station Square[8]:"**

As the adjacent tables illustrate, findings about the frequency of purchases are highly reflective of what was anticipated.

Table 2-8, Merchandise Purchasing

Merchandise Lines	Percentage of Respondents Making Purchases in the Last Year
MENS CASUAL CLOTHES	75%
WOMENS CASUAL CLOTHES	71%
MENS "DRESS" CLOTHES	71%
WOMENS "DRESS"CLOTHES	66%
SHOES FOR WOMEN	66%
HOUSEWARES	55%
JEWELRY	49%
SHOES FOR MEN	48%
ENTERTAINMENT EQUIPMENT	37%
FURNITURE	32%

People buy certain merchandise, such as furniture, less frequently than clothing. Each of the ten merchandise lines is discussed in considerably more detail in Appendix B of this report[9]. The findings in Table 2-9 reinforce those presented in Table 2-8.

Table 2-9, Shopping Frequency

Merchandise Lines	Percentage of Respondents Shopping "Often" during the Last Year
WOMENS CASUAL CLOTHES	24%
WOMENS "DRESS"CLOTHES	20%
MENS CASUAL CLOTHES	15%
MENS "DRESS" CLOTHES	12%
SHOES FOR WOMEN	12%
HOUSEWARES	7%
JEWELRY	5%
SHOES FOR MEN	3%
ENTERTAINMENT EQUIPMENT	1%
FURNITURE	1%

Table 2-9 presents more specific information about shopping frequency. Respondents who had purchased merchandise in the last year rated their shopping frequency as "rarely", "occasionally", or "often" without being requested to be more specific. Clothing, particularly women's clothing, is the merchandise line for which the highest proportion of respondents reported shopping "often".

Table 2-10, "Exclusive" Store Types

Merchandise Lines	Store Types	Percentage of Respondents Reporting "Exclusive" Use
WOMENS "DRESS"CLOTHES	Department	57%
	Specialty	14%
	Discount	10%
MENS CASUAL CLOTHES	Department	54%
	Specialty	16%
	Discount	14%
MENS "DRESS" CLOTHES	Department	53%
	Specialty	22%
	Discount	10%
WOMENS CASUAL CLOTHES	Department	49%
	Specialty	13%
	Discount	17%
SHOES FOR WOMEN	Department	33%
	Specialty	43%
	Discount	10%
HOUSEWARES	Department	31%
	Specialty	16%
	Discount	39%
JEWELRY	Department	28%
	Specialty	53%
	Discount	7%
ENTERTAINMENT EQUIPMENT	Department	26%
	Specialty	53%
	Discount	14%
FURNITURE	Department	24%
	Specialty	60%
	Discount	8%
SHOES FOR MEN	Department	22%
	Specialty	64%
	Discount	7%

In Table 2-10, high proportions of respondents report that they shop "exclusively" at certain types of stores for certain merchandise lines. For example, 81% of the respondents who shopped for Womens "Dress" Clothing during the last year reported exclusive shopping at Department Stores [57%], Specialty Stores [14%], or Discount Department Stores [10%]; the remaining 19% of the respondents reported shopping at a combination of these types of stores.

It is very clear that the majority of respondents shop for the top four merchandise lines, various types of clothing, exclusively at department stores. It is also clear that, with the exception of "Housewares", a plurality of respondents shop for other merchandise lines at specialty stores.

These aspects of consumer behavior vary according to demographic characteristics such as household income and age. Appendix B elaborates on findings about these variations.

Table 2-11, Use of CBD or Station Square Stores

Merchandise Lines	Percentage of Respondents Shopping in CBD or Station Sq.
MENS "DRESS" CLOTHES	31%
WOMENS "DRESS"CLOTHES	31%
MENS CASUAL CLOTHES	28%
WOMENS CASUAL CLOTHES	27%
JEWELRY	23%
SHOES FOR WOMEN	21%
SHOES FOR MEN	17%
HOUSEWARES	15%
ENTERTAINMENT EQUIP.	9%
FURNITURE	8%

The information in Table 2-11, supported by its further discussion in Appendix B, is the key to understanding the Pittsburgh CBD's relative position in its primary market area with respect to these merchandise lines.

The table shows that less than a third of the people who have purchased an item from the listed merchandise lines in the last year actually shopped for the item in the CBD.

Both men's and women's "dress" clothing lead this list; 31% of the respondents who purchased these items in the last year shopped in the CBD for them.

In summary, clothing is the "leading" merchandise line in terms of shopping frequency and the proportion of respondents who reported shopping for it in the CBD. Just under a third of the people who purchased men's or women's "dress" clothing reported shopping in CBD or Station Square stores. The proportion for casual clothing was slightly lower.

Nonetheless, Full Line Department Stores were the types of stores used exclusively by a majority of the people who purchased men's or women's "dress" or casual clothing during the last year. The downtown Department Stores should have the widest variety and inventory of these types of merchandise[10]. This finding should be encouraging for CBD department stores since it indicates that over 30% of the shoppers are considering and probably making purchases in the CBD.

Jewelry is another line of merchandise for which relatively high proportions of purchasers report shopping in CBD or Station Square stores; they report using Specialty Stores and, to a lesser extent, Department Stores. While the mix of costume and fine jewelry to which respondents were referring was not defined, the purchasers' income and age profiles suggest fine jewelry.

Two other merchandise lines, women's shoes and housewares, may also have important potential for CBD merchants. Department Stores and Specialty Stores attract shoppers for women's shoes but only 21% of these purchasers report shopping for this merchandise in CBD or Station Square stores. Housewares purchasers report shopping for these items at both Department Stores and Discount Department Stores. Only 15% of the purchasers report shopping for this merchandise at CBD or Station Square stores.

Furniture and home entertainment equipment purchasers are not shopping for these items in downtown Pittsburgh.

These findings, as amplified by the socio - economic profiles of the respondents in Appendix B, should be assessed against the mix of merchandise available in CBD stores and their competitors outside the CBD.

2.3 THE SHOPPING TRIP: ITS MODE AND TIMING

In addition to providing information about each of the merchandise lines respondents were invited to explain when they usually did this type of shopping and what mode of transportation they used to do it.

Over ninety percent [93%] of the respondents said that the private automobile was the usual mode of travel for these types of shopping trips[11].

Table 2-12, Shopping Trips by Time and Day

Time of Day	Days of Week	Number of All Respondents	[Percentages]	
ONLY DURING THE DAY	only during the week	111	[17%]	
	only on weekends	83	[12%]	
	both	75	[11%]	40%
ONLY IN THE EVENING	only during the week	31	[5%]	
	only on weekends	54	[8%]	
	both	81	[12%]	25%
BOTH DAY AND EVENING	only during the week	26	[4%]	
	only on weekends	57	[9%]	
	both	149	[22%]	35%
	Valid Cases	667	[100%]	100%

As Table 2-12 shows, 40% of the respondents shop exclusively during the daytime while 25% shop only during evenings. The rest, 35%, shop at both times. Indeed, the most frequent answer was by 22% of the respondents:

> **"I shop 'all the time': days and evenings, weekdays and weekends!"**

The next most frequent response was very limited; 17% said that they shopped exclusively during the day on weekdays. This is the most significant finding related to CBD or Station Square shopping.

Since 83% of the shopping is done during non working times on week day evenings or weekends and since these are the very times when the CBD is "at rest" [i.e., people are not at work and the garages or other facilities are not filled to capacity], "off peak" CBD shopping is worth serious consideration.

2.4 WHAT DOES SHOPPING MEAN TO SHOPPERS

During the interview respondents were invited to discuss their shopping patterns with regard to specific merchandise, their preferences for certain major retail centers compared to Pittsburgh's CBD, and in terms of what shopping means to them:

> **"Tell me whether you strongly agree, agree, disagree, or strongly disagree with the following statement:**
>
> **'Shopping is really a form of entertainment and recreation for me; I don't go shopping just to buy things'."**

Table 2-13, Shopping as Entertainment & Recreation

	Number of Respondents	[percentage]
STRONGLY AGREE	77	[11%]
AGREE	262	[40%]
DISAGREE	228	[35%]
STRONGLY DISAGREE	93	[14%]
Valid Cases	660	[100%]

This set of respondents is, for all intents and purposes, equally divided on this issue; the respondents' views of shopping are not just utilitarian and not just social.

Furthermore, on the basis of careful analysis of all demographic factors only one statistically significant factor explained respondents' answers to this question. The factor was **gender.**

The finding was that significantly higher proportions [56%] of women "agreed" or "strongly agreed" with the premise while significantly higher proportions [58%] of men "disagreed" or "strongly disagreed" with the premise. The significance of this finding is not influenced by the fact that two thirds of all respondents are female[12].

2.5 WHERE IS MAJOR RETAIL SHOPPING DONE?

All respondents were invited to indicate if they had made a shopping trip to either of the Major Retail Centers [MRCs] or Malls listed in the following table during the last five years.

Table 2-14, MRCs Visited in the Last Five Years

Major Retail Center	Percentage of Respondents Reporting Visits to Each MRC
PITTSBURGH CBD	70%
CENTURY III MALL	67%
MONROEVILLE MALL	61%
ROSS PARK MALL	46%
SOUTH HILLS VILLAGE	44%
BEAVER VALLEY MALL	13%
WESTMORELAND MALL	11%

Over half of all respondents reported making visits to Pittsburgh's Downtown, Century III Mall, or Monroeville Mall. The City of Pittsburgh's Downtown, the CBD, was mentioned by a higher proportion [70%] of respondents than any other center.

An analysis of these rates by residential location reveals that almost all of the shoppers who live outside the City of Pittsburgh have visited the Mall that is closest to them in the last five years.

Three quarters of the City's residents have visited their most proximate Major Retail District, the CBD, to shop in the last five years. Residents of all other suburban areas, except the Mon Valley, have CBD visitation rates that are similar to City residents; the rates range from 68% to 77%.

The CBD has drawn a clear majority of Allegheny County shoppers in the last five years; these shoppers are, proportionately equal, residents of the City and most suburban areas. Proximity to the CBD, alone, does not explain these rates.

2.5.1 MOST FREQUENTLY VISITED MAJOR RETAIL CENTERS

In addition to indicating their familiarity with each of these MRCs or Malls respondents were invited to indicate the one to which shopping trips had been most, and second most frequent, during the last year.

Table 2-15, Most Frequently Visited MRC During the Last Year

Major Retail Center	Number of Respondents	[Percentage]
PITTSBURGH	65	[10%]
SOUTH HILLS	110	[17%]
CENTURY III	140	[22%]
ROSS PARK	149	[23%]
MONROEVILLE	175	[28%]
Valid Cases	639	[100%]

While 70% of the respondents report visiting the Pittsburgh CBD in the last five years, only 10% of them considered the Pittsburgh CBD to be their most frequently visited MRC during the last year; 29% of the respondents who mentioned a second MRC reported that the CBD was their second most frequently visited MRC.

Table 2-16, 2nd Most Frequently Visited MRC During the Past Year

Major Retail Center	Number of Respondents	[Percentage]
PITTSBURGH	150	[29%]
CENTURY III	134	[26%]
MONROEVILLE	101	[20%]
SOUTH HILLS	76	[14%]
ROSS PARK	57	[11%]
Valid Cases	518	[100%]

Approximately a third of all respondents reported that the Pittsburgh CBD was either their "most" or "second most" frequently used major retail center during the last year.

In the following two tables responses about the most and second most frequently visited Major Retail Centers are summarized by residential location.

Table 2-17, Most Frequently Visited MRC During the Past Year

Major Retail Center	Residential Location	Number of Respondents	[Percentage]
PITTSBURGH	City	35	[5%]
	Suburbs	30	[5%]
SOUTH HILLS	City	21	[3%]
	Suburbs	89	[14%]
CENTURY III	City	29	[5%]
	Suburbs	111	[17%]
ROSS PARK	City	30	[5%]
	Suburbs	119	[18%]
MONROEVILLE	City	34	[5%]
	Suburbs	141	[23%]
		Valid Cases 639	[100%]

Two clear findings emerge.

First, a majority of City of Pittsburgh residents consider their primary or secondary Major Retail Center to be one of the suburban malls -- not the CBD!

Virtually equal numbers of City residents have identified the five Major Retail Centers as their primary or secondary choices.

Approximately two thirds of the Pittsburgh residents who reported shopping in the CBD within the last five years also reported that they could travel to the CBD within 15 minutes. Less than a third of these people reported that the CBD was their most frequently visited Major Retail Center.

Non City residents, on the other hand, made their choice on the basis of proximity. For example, 94% of East Suburban respondents identified Monroeville Mall as their most frequently visited Major Retail Center.

Table 2-18, 2nd Most Frequently Visited MRC During the Past Year

Major Retail Center	Residential Location	Number of Respondents		[Percentage]
PITTSBURGH	City		34	[7%]
	Suburbs		116	[22%]
SOUTH HILLS	City		18	[3%]
	Suburbs		58	[11%]
CENTURY III	City		33	[7%]
	Suburbs		101	[19%]
ROSS PARK	City		17	[3%]
	Suburbs		40	[8%]
MONROEVILLE	City		21	[4%]
	Suburbs		80	[16%]
		Valid Cases	518	[100%]

As presented in Table 2-18, the Pittsburgh CBD is the second most frequently visited Major Retail Center for a higher proportion of Non City residents than any of the other MRC.

There are, however, some exceptions that warrant attention. Almost three quarters of the East Suburban respondents named, in equal proportions, either the Pittsburgh CBD or Century III Mall as their second most frequently visited Major Retail Centers. Similar patterns existed in the South Hills Suburbs between the Pittsburgh CBD and Century III Mall and in the North Suburbs between the Pittsburgh CBD and Monroeville Mall.

The key point is that a clear majority of Allegheny County shoppers have knowledge of shopping in the Pittsburgh CBD. While the suburban residents are selecting their most frequently visited mall on the basis of proximity; City residents seem to be making choices about where to shop based on other factors.

While the Pittsburgh CBD is a clear choice as the second most frequently visited mall by suburban residents, there are some exceptions that reinforce the finding that shoppers are making shopping choices on the basis of factors other than proximity.

2.6 PROFILE OF CBD SHOPPERS

Allegheny County's residents constitute the Primary Trade Area for the city of Pittsburgh's Downtown Shopping District since a majority [actually, two thirds] of the respondents to this survey report that they have <u>shopped</u> in the Pittsburgh CBD during the past five years.

Indeed, as indicated in Table 2-19, 54% of the respondents report shopping in the CBD in the last year[13].

Table 2-19, Most Recent Shopping Visit to Pittsburgh CBD

Visited the CBD in the:	Number of Respondents	[Percentage]
LAST MONTH	194	[29%]
LAST YEAR	166	[25%]
2 to 3 YEARS	63	[9%]
4 to 5 YEARS	22	[3%]
5 or MORE YEARS	171	[26%]
NEVER	53	[8%]
	Valid Cases 669	[100%]

Those respondents who have reported making a shopping visit to the Pittsburgh CBD within the last five years are designated, for purposes of this report, **"CBD Shoppers".** They are distinguished from the other third of the respondents, who are designated -- **"Non CBD Shoppers".**

As indicated in Table 2-19, approximately 34% of the respondents reported that they had NOT made a shopping visit to the Pittsburgh CBD in the last five years [26%] or ever [8%]. These are the "Non CBD Shoppers".

In conducting the interviews "CBD Shoppers" were treated slightly differently[14] from "Non CBD Shoppers". Accordingly, their responses are treated separately in this section of the report.

There are some demographic differences between CBD Shoppers and Non CBD Shoppers that warrant mentioning. CBD Shoppers' characteristics differ from those of other respondents in the following ways:

CBD Shoppers are younger than Non CBD Shoppers. Approximately a third of the CBD Shoppers are under thirty years of age; that is about twice the percentage of Non CBD Shoppers. Almost all of the teenage respondents are CBD Shoppers.

Table 2-20, Age Differences: CBD versus Non CBD Shoppers

Age Group	Number of Respondents		[CBD Shoppers as] [Percent of Group]
15 - 19	65	10%	[94%]
20 - 29	126	19%	[72%]
30 - 45	214	32%	[66%]
46 - 65	167	25%	[61%]
Over 65	93	14%	[50%]
	Valid Cases 665	100%	

■ CBD Shoppers ▒ Non CBD Shoppers

Furthermore, half of the Non CBD Shoppers are over 45 years of age; that compares with about a third of the CBD Shoppers. Only half of the shoppers who are at least 65 years old are CBD Shoppers.

For all intents and purposes the proportion of CBD and Non CBD Shoppers between the ages of 30 and 45 are the same; about a third.

Most [73%] CBD Shoppers are not residents of the City. While over three quarters [76%] of the respondents who are residents of the City are "CBD Shoppers", almost a quarter are not. City residents constitute only 27% of the CBD Shoppers.

CBD Shoppers' household income is higher than the household income of Non CBD Shoppers. Nearly 30% of the Non CBD Shoppers report household incomes below $ 15,000; that compares with about 16% of the CBD Shoppers. In every other household income category a significantly higher proportion of respondents are CBD Shoppers. This is especially evident in the over $ 60,000 household income category; over 80% of these respondents are classified as CBD Shoppers.

Furthermore, over 50% of the most recent CBD shoppers report household incomes in excess of $ 30,000 whereas less than 10% of the CBD Shoppers who have not been there in the last year report such incomes.

Table 2-21, Household Income Differences: CBD versus Non CBD Shoppers

Household Income Groups	Number of Respondents		[CBD Shoppers as] [Percent of Group]
Under $15,000	127	20%	[51%]
$15 - $30,000	240	39%	[68%]
$30 - $60,000	202	33%	[69%]
Over $60,000	53	8%	[81%]
Valid Cases	622	100%	

CBD Shoppers ▒ Non CBD Shoppers

As shown in Table 2-22, the Labor Force Status of CBD and Non CBD Shoppers differs in the following ways: significantly higher proportions [88%] of "Student" respondents are CBD Shoppers; significantly lower proportions [52%] of retirees are CBD Shoppers; slightly lower proportions [60%] of "At Home" respondents are CBD Shoppers; and higher proportions [69%] of "Employed" respondents are CBD Shoppers.

Table 2-22, Labor Force Differences: CBD versus Non CBD Shoppers

Labor Force Status Group [CBD Shoppers as] [Percent of Group]	Number of Respondents	
Employed Person [69%]	356	53%
" At Home " [60%]	126	19%
Retired Person [52%]	114	17%
Student [88%]	73	11%
Valid Cases	669	100%

CBD Shoppers ▒ Non CBD Shoppers

2.6.1 CBD WORKERS

As indicated in the prior table, over half [55%] of CBD Shoppers are employed persons; special attention should, therefore, be given to their work place locations and related characteristics.

Table 2-23, Employed Respondents: Work Place Locations of CBD versus Non CBD Shoppers

Work Place Location	Number of Employed Respondents		[Percentage of CBD] [Shoppers in Group]
Pittsburgh CBD	56	13%	[90%]
Elsewhere in Pittsburgh	106	22%	[75%]
Outside of Pittsburgh	208	35%	[63%]
Valid Cases	370	100%	

■ CBD Shoppers ▒ Non CBD Shoppers

Table 2-23 displays the relationships among the work place locations of employed respondents and their status as CBD or Non CBD Shoppers. It shows that 90% of the CBD workers, 75% of the Pittsburgh workers, and 63% of the suburban workers are CBD Shoppers.

However, it also shows that CBD Workers constitute only 20% of all the CBD Shoppers who are employed. Pittsburgh and suburban workers constitute 80% of the CBD Shoppers who are employed -- about 30% and 50%, respectively.

The key point is that only 13% of the respondents <u>who are employed and are CBD Shoppers</u> have work places in the CBD.

CBD workers are a minority, about 7%, of all "CBD Shoppers".

In spite of these proportions CBD workers are acknowledged as an important segment of CBD Shoppers. They are people who are regularly in proximity to the CBD's stores and shop relatively frequently at CBD stores. Indeed, almost 90% of the CBD workers reported shopping in the CBD during the last year[15].

Table 2-24 shows that CBD Workers constitute a relatively small share of all CBD Shoppers, regardless of their employment status, based on their most recent visit. There were 4.5 Non CBD Workers for each CBD Worker who reported shopping in the CBD in the last month; 6.8 to 1 in the last year!

Table 2-24, Most recent Shopping Visit to Pittsburgh CBD: CBD Workers versus Others

CBD Shopping in the:	CBD Worker Status	Number of Respondents	[Percentage]
LAST MONTH	CBD	35	[5%]
	Not CBD	158	[24%]
LAST YEAR	CBD	11	[2%]
	Not CBD	155	[23%]
LAST 3 YEARS	CBD	2	[<1%]
	Not CBD	61	[9%]
LAST 5 YEARS	CBD	0	[0%]
	Not CBD	22	[3%]
OVER 5 YEARS	CBD	6	[1%]
	Not CBD	164	[25%]
NEVER	CBD	2	[<1%]
	Not CBD	51	[8%]
	Valid Cases	667	[100%]

Note: **CBD** Means CBD Workers
Not CBD Means both Non CBD Workers and nonworkers

Even taking into account the high proportion of CBD Workers who have done CBD shopping in the last month, it is difficult to demonstrate that the CBD Worker when compared to all CBD Shoppers is as important to CBD shopping as other segments[16].

As a final aspect of this assessment of CBD Workers' importance to CBD shopping, it was discovered that about a fifth of the CBD Workers identified the CBD as the Major Retail Center that they visited most frequently; another 40% reported that it was their second most frequently visited MRC[17].

These findings suggest that CBD shopping may not be as important to as many CBD Workers as anticipated. Their most frequently visited MRCs are generally in proximity to their residential locations; just like other shoppers in Allegheny County.

2.7 SUMMARY

About half of Allegheny County's residents report that shopping is really a form of entertainment and recreation; they are not just shopping to buy things. This finding is important to understanding the CBD's draw.

The Pittsburgh CBD has drawn a clear majority of Allegheny County shoppers in the last five years; over half of the county's residents have shopped in the CBD during the year prior to this survey. These shoppers are drawn proportionately from the City and most suburban areas.

While residential proximity to suburban shopping malls explains suburban residents' shopping patterns, the same can not be said for the CBD; proximity to the CBD, alone, does not explain these visitation rates.

While almost all of the shoppers who live outside the city of Pittsburgh have visited the Mall that is closest to them in the last five years, only three quarters of the City's residents have visited the CBD. Residents of all other suburban areas, except the Mon Valley, have CBD visitation rates that are similar to City residents; the rates range from 68% to 77%. Suburban residents are essentially as likely as City residents to be CBD Shoppers.

While 70% of all respondents report visiting the Pittsburgh CBD in the last five years, only 10% of them considered the Pittsburgh CBD to be their most frequently visited MRC during the last year; 29% of the respondents who mentioned a second MRC reported that the CBD was the second most frequently visited. However, a majority of city of Pittsburgh residents consider their primary and secondary Major Retail Center to be suburban malls -- not the CBD!

Over 80% of all the shopping, about which respondents provided information, is done during non working times on week day evenings or weekends. Since these are the very times when the CBD is "at rest" [i.e., people are not at work and the garages or other facilities are not filled to capacity]; encouraging "off peak" CBD shopping, as is done at suburban malls, is worth serious consideration.

The "leading" merchandise line in terms of both shopping frequency and the proportion of respondents who reported shopping for it in the CBD is clothing. Just under a third of the people who purchased men's or women's "dress" clothing reported shopping in CBD or Station Square stores. The proportion for casual clothing was slightly lower.

"Full Line" Department Stores were the types of stores used exclusively by a majority of the people who purchased men's or women's "dress" or casual clothing during the last year. These findings should be encouraging for CBD merchants since they indicate that over 30% of the shoppers are considering and probably making purchases in the CBD.

CBD Shoppers, defined as those respondents who have shopped in the CBD in the last five years, are different from other Allegheny County shoppers. They are younger and from higher income households. These CBD Shoppers constitute about two thirds of Allegheny County's residents.

Employed people whose work place location is in the CBD, "CBD Workers", are a minority of CBD Shoppers. They constitute about 7% of all CBD Shoppers. They are people who are regularly in proximity to the CBD's stores and shop relatively frequently at CBD stores. Indeed, almost 90% of the CBD workers reported shopping in the CBD during the last year. However, even taking into account the high proportion of CBD Workers who do CBD shopping regularly, it is difficult to demonstrate that the CBD Worker, when compared to all CBD Shoppers, is as important to CBD shopping as are other segments of the Allegheny County market.

Finally, these findings suggest that CBD shopping may not be as important to as many CBD Workers as anticipated. Their most frequently visited MRCs are generally in proximity to their residential locations -- just like other shoppers in Allegheny County.

The city of Pittsburgh and the CBD merchants should not take the Pittsburgh Downtown's central location and traditional retail draw for granted. People, including a majority of City residents and people who work in the City, are shopping at suburban malls in addition to or instead of the CBD.

All CBD Shoppers were invited to assess Downtown shopping; they were invited to express their likes and dislikes in general and relative to the suburban malls. Their judgments are presented and analyzed in the following chapter.

3 ASSESSING DOWNTOWN SHOPPING

Throughout the interviews opportunities were created for respondents to give their views of the shopping experience in the Pittsburgh CBD. In this section the respondents' general assessment is followed by particular "best" and "worst" aspects of CBD shopping.

The last question in a relatively long questionnaire was intended to allow all respondents to summarize their feelings about Downtown Pittsburgh, even if they had never shopped there:

> **"Tell me whether you strongly agree, agree, disagree, or strongly disagree with the following statement:**
>
> **'When I think about shopping in Downtown Pittsburgh, I think of it as an enjoyable experience'."**

Table 3-3, "CBD Shopping, An Enjoyable Experience"

Opinion:	Number of Respondents		[CBD Shoppers as] [Percentage of Group]
STRONGLY AGREE	59	9%	[93%]
AGREE	284	45%	[85%]
DISAGREE	188	30%	[57%]
STRONGLY DISAGREE	106	16%	[35%]
Valid Cases	637	100%	

■ CBD Shoppers ▒ Non CBD Shoppers

More than half [54%] of Allegheny County shoppers "agree" or "strongly agree" with the premise. As should be expected, the most significant difference among those who agreed and those who disagreed with the statement was the respondents' status as CBD or Non CBD Shoppers[18]. Over two thirds of the CBD Shoppers "agreed" or "strongly agreed" with the premise; over three quarters of the Non CBD Shoppers "disagreed" or "strongly disagreed" with the premise.

This finding supports the notion that people's shopping behavior is related to the degree that they enjoy the shopping experience. It also supports the notion that shopping behavior is influenced by perceptions.

It is, therefore, important to note that a third of the CBD Shoppers disagreed with the premise -- they did not think that shopping in the CBD was "an enjoyable experience".

CBD Shoppers were invited to indicate whether their "overall impression" of the CBD was that it had improved, declined, or remained the same during the past five years.

A clear majority [61%] reported that it had improved. A significantly high proportion of respondents under 30 years old reported that the CBD had "improved"; a significantly high proportion of respondents over 45 years old reported that the CBD had "declined" in the last five years[19].

Table 3-3, Has the CBD Improved, Declined, or Remained the Same?

	Number of CBD Shoppers [percentage]
IMPROVED	242 [61%]
THE SAME	52 [13%]
DECLINED	103 [26%]
Valid Cases	397 [100%]

CBD Shoppers were also invited to indicate whether they were buying more, less, or about the same amounts in the CBD now compared to five years ago.

Nearly 40% reported buying less today than they did five years ago. However, a statistically significant proportion of CBD Shoppers who shopped in the CBD within the last month reported buying more in the CBD than they did five years ago. These more recent CBD Shoppers constituted 58% of the all CBD Shoppers who reported buying more.

Table 3-3, Buying more, less, or the Same in the CBD

	Number of CBD Shoppers [percentage]
MORE	115 [27%]
SAME	148 [34%]
LESS	168 [39%]
Valid Cases	431 [100%]

Although most CBD Shoppers agree that the CBD has improved or at least remained the same in the last five years, nearly three quarters of the CBD Shoppers are buying the same or less in the CBD than they did five years ago.

Age is the demographic factor that distinguishes CBD Shoppers who report buying "more" from those who report shopping "less" in the CBD. A significantly high proportion of respondents under 30 years old report buying "more"; a significantly high proportion of respondents over 45 years old report buying "less" in the CBD than they did five years ago[20].

Table 3-3 helps to explain the proportions CBD Shoppers who acknowledge that the CBD has improved in the last five years but now report buying less there. First, 38% of the CBD Shoppers acknowledge that CBD Shopping has "improved" AND report that their buying has either remained the "same" or become "less" than it was five years ago. Second, about half of the CBD Shoppers fall into one of two equally sized groups whose views "off set" or "balance" each other.

Table 3-3, Impressions of the CBD and Purchasing Activity

Changes in CBD Buying	Impressions of CBD Shopping Improved	Same	Declined	Total
Buy More	23%	2%	2%	27%
Buy the Same	24%	4%	6%	34%
Buy Less	14%	7%	18%	39%
Total	61%	13%	26%	100%

About a quarter of CBD Shoppers acknowledge that CBD shopping has either improved or remained the same AND buy more in the CBD; another quarter report that CBD shopping has declined or remained the same AND buy less in the CBD than they did five years ago.

The remaining 12% of the CBD Shoppers have reported that CBD shopping has declined or remained the same and that they are buying about the same in the CBD as they did five years ago. This relatively small proportion of CBD Shoppers are somewhat "captive" to CBD shopping.

These findings help to explain some of the factors behind the paradox of 61% of the CBD Shoppers reporting that CBD shopping has improved and 39% of the CBD Shoppers reporting that they buy less in the CBD than they did five years ago. The main point is that about half of the CBD Shoppers are indicating that they link their decisions to buy or not to buy with their views about the quality, or the change in quality of, the place in which they shop. The other half do not. Most of the other half, 38% of the CBD Shoppers, acknowledge that the CBD has improved but do not buy more in the CBD than they did five years ago. These are the CBD Shoppers that are buying more at other Major Retail Centers rather than the CBD.

While relatively high proportions of the most recent CBD Shoppers report buying more in the CBD than they did five years ago, it is important to address those issues that, if resolved by the City and the CBD merchants, would raise the proportion of all CBD Shoppers who buy in the CBD. The specific views of CBD and Non CBD Shoppers are presented and analyzed in the following section.

3.1 THE "BEST" & "WORST" ASPECTS OF THE CBD

In addition to asking respondents to compare key aspects of the CBD with the Malls, respondents who had shopped in the CBD within the last five years were invited to tell us in their own words what they considered to be the best and the worst aspects of shopping in the Pittsburgh CBD[21].

The respondents were very responsive. We were given 491 "best aspects" by 364 respondents and 514 "worst aspects" by 389 respondents[22]. The following two tables present the most frequently mentioned "best" and "worst" aspects of shopping in the Pittsburgh CBD[23].

As suggested by Table 3-3, the CBD's best shopping aspects concern those factors for which merchants are typically responsible.

Table 3-3, Best Aspects of CBD Shopping

Best Aspects	Number of Responses [percent of CBD Shoppers]
MORE VARIETY OF MERCHANDISE	130 [36%]
BETTER MIX OF STORES	79 [21%]
CONVENIENT PUBLIC TRANSIT	31 [9%]
DEPARTMENT STORES	29 [8%]
PROXIMITY FROM WORK	27 [7%]
GOOD APPEARANCE	27 [7%]
OVERALL CONVENIENCE	22 [6%]
ACCESS BETWEEN STORES	20 [5%]
PROXIMITY TO HOME	16 [4%]
STORES ARE UNIQUE	16 [4%]
BETTER QUALITY	15 [4%]

In fact 333 responses from 364 respondents mentioned one of these "merchant oriented" shopping aspects as being "best" about the CBD. Only 14% of the responses mentioned some aspect of shopping in the CBD that was related to public policy, such as "Convenient Public Transit".

As suggested by Table 3-3, the CBD's worst shopping aspects concern those factors which characterize a downtown: a dense concentration of businesses, with attendant crowds, traffic, and parking. These aspects of shopping are typically the responsibility of government or business associations, rather than individual merchants or an individual developer. In fact 426 responses from 389 respondents mentioned a "management" or "public policy" aspect as being the "worst aspect" about shopping in the CBD. Only 10% of the responses mentioned some "worst aspect" of shopping in the CBD that was related to merchants, such as a lack of store quality, variety, or mix.

Table 3-3, Worst Aspects of CBD Shopping

Worst Aspect	Number of Responses [percent of CBD Shoppers]
PARKING [IN GENERAL]	154 [40%]
TOO MUCH TRAFFIC	83 [21%]
TOO CROWDED	56 [14%]
ACCESS BETWEEN STORES	45 [12%]
EXPENSE OF PARKING	41 [11%]
ACCESS DIFFICULTY	20 [5%]
DANGEROUS/SAFETY	17 [4%]
BAD ATMOSPHERE	11 [3%]
TOO FAR TO TOWN	11 [3%]

3.2 WHY DON'T NON CBD SHOPPERS SHOP IN THE CBD?

When a respondent said **"I haven't shopped in the Pittsburgh Downtown in my life or in the last five years"**, we asked: **"Why haven't you?"** The response was overwhelming. Over 95% of the Non CBD Shoppers gave a total of 432 responses to this question. Of the 215 respondents 166 gave two reasons and another 51 gave three reasons.

Almost half [47%] of all the responses addressed issues that people traditionally look to government to solve: traffic and parking. Table 3-3 lists these and the other reasons why people told us they did not shop in the Pittsburgh CBD.

Table 3-3, "Why Don't You Shop in the CBD?

Reasons:	Responses of Non CBD Shoppers	
PARKING [IN GENERAL]	64	[30%]
CBD IS INCONVENIENT	53	[25%]
TOO MUCH TRAFFIC	39	[18%]
STORES ARE NOT UNIQUE	38	[18%]
TOO FAR TO TOWN	31	[14%]
ACCESS DIFFICULTY	25	[12%]
EXPENSE OF PARKING	19	[9%]
UNFAMILIAR WITH TOWN	18	[8%]
CBD IS TOO CROWDED	18	[8%]
ACCESS BETWEEN STORES	13	[6%]
STORES ARE TOO EXPENSIVE	8	[4%]
CBD IS TOO DANGEROUS	8	[4%]
INCONVENIENT PAT SCHEDULES	7	[3%]
CBD HAS A BAD ATMOSPHERE	6	[3%]
CONSTRUCTION	5	[2%]

It is noteworthy to mention that 39% of the responses addressed matters of personal circumstance such as "Pittsburgh is inconvenient to me" or "It's too far to town". Indeed, 84% of these responses were from people whose residence was outside the city of Pittsburgh. This supports the general finding that suburban residents select their MRCs to a great extent on the basis of proximity and, as suggested here, access.

Only 15% of the responses addressed issues about the CBD's stores or merchants. Indeed, the predominant comment about the stores [made by 38 or 18% of the respondents] was "The CBD's stores are not unique".

3.3 COMPARING DOWNTOWN TO THE MALLS

As indicated in ? and ?, all respondents were invited to name the major retail center at which they had shopped most, or second most, frequently during the last year. For those respondents who had shopped in the CBD during the last five years a set of comparison questions was presented so that they could indicate in relative terms how they felt certain aspects of the CBD compared with other places that they frequently shopped.

Beginning with Table 3-3, the responses are presented for all CBD Shoppers. Table 3-3 indicates the Mall to which respondents are comparing the Pittsburgh CBD[24].

Monroeville and Ross Park Malls are used equally as bases of CBD comparisons by CBD Shoppers; Century III and South Hills Village are also important comparatively.

Table 3-3, Mall to Which CBD is Being Compared

Shopping Malls	Number of CBD Shoppers	[Percentage]
MONROEVILLE MALL	118	[28%]
ROSS PARK MALL	118	[28%]
CENTURY III MALL	98	[23%]
SOUTH HILLS VILLAGE	79	[18%]
OTHER MALLS	16	[3%]
Valid Cases	429	[100%]

On each of the following pages the comparative responses of CBD Shoppers to a series of questions about the CBD relative to the Major Retail Centers [Malls] are presented and briefly discussed[25]. The first set of comparisons concerns "shopping in general", "prices, quality, and variety", "specialty stores", "department stores", and "service in stores". The second set of comparisons concerns "convenience to the shopping center", "parking", "getting around to stores", "image and appearance", and "safety and security".

3.3.1 SHOPPING IN GENERAL IN DOWNTOWN PITTSBURGH

Table 3-3, Comparison of CBD to Shopping Malls

Rating:	Number of CBD Shoppers	[percentage]
MUCH BETTER	20	[4%]
BETTER	90	[21%]
THE SAME	90	[21%]
WORSE	186	[43%]
MUCH WORSE	29	[6%]
NO OPINION	23	[5%]
Valid Cases	438	[100%]

"In general would you say that shopping in downtown Pittsburgh is much better, better, worse, or much worse than shopping at....?

A higher proportion of respondents rated shopping in the CBD as "worse" or "much worse" than "better" or "much better" than the malls; this is hardly favorable to the CBD.

Just over a quarter of the CBD Shoppers rated this trait as either "the same" or had no opinion. The factor that may indicate the intensity of these general views of CBD shopping relative to the malls is the familiarity of CBD Shoppers with CBD shopping. A significantly high proportion [63%] of those CBD shoppers who rated this trait "better" or "much better" had shopped in the CBD during the last month. This compares with the fact that 70% of the CBD Shoppers who rated this trait "worse" or "much worse" were less recent CBD shoppers.

There is some evidence that the relative newness of two malls, Century III and Ross Park, is a factor that influenced respondents' answers to this question. A slightly higher, but not statistically significant, proportion of respondents who compared the CBD to Century III and Ross Park Malls, tended to rate the CBD "worse".

CBD Shoppers rate the malls as being "better" or "much better" than the CBD for shopping; however, nearly two thirds of those CBD Shoppers who have made their most recent CBD shopping visit in the month prior to the survey, rate it better than the malls.

3.3.2 PRICES, QUALITY, & VARIETY

Table 3-3, Comparison of Prices, Quality, and Variety

Rating:	Number of CBD Shoppers	[percentage]
MUCH BETTER	25	[6%]
BETTER	112	[26%]
THE SAME	220	[51%]
WORSE	46	[10%]
MUCH WORSE	2	[<1%]
NO OPINION	28	[7%]
Valid Cases	433	[100%]

"Now I would like to know how you rate the overall <u>prices, quality, and variety</u> of the goods and services found in the Downtown Pittsburgh's stores compared to....?

As indicated in Table 3-3, the majority of CBD Shoppers rated the prices, quality, and variety of the goods and services in the CBD to be "the same" as in the malls to which they were making comparisons. Additionally, almost a third rate these traits as being "better" or "much better" in the CBD relative to the malls. When included with those who had "no opinion", these respondents constituted 90% of all CBD Shoppers.

This is certainly a strong endorsement of the CBD Shopping district stores and their merchandise lines relative to the malls.

This finding is generally supported for all the malls; although there is a slight tendency for [40% of the] South Hills Village respondents to rate the CBD "better" or "much better" in these respects.

The key finding is that CBD Shoppers are not reporting that the CBD's merchandise is over priced for its quality; they like the variety of merchandise from which they can chose.

3.3.3 CBD SPECIALTY SHOPS

Table 3-3, Comparison of Specialty Shops to Malls

Rating:	Number of CBD Shoppers		[Percentage]
MUCH BETTER		39	[9%]
BETTER		126	[30%]
THE SAME		82	[20%]
WORSE		51	[12%]
MUCH WORSE	.	3	[<1%]
NO OPINION		120	[29%]
	Valid Cases	421	[100%]

"How would you rate the merchandise at the specialty shops in Fifth Avenue Place, OXFORD Centre, & PPG Place compared to ....?"

A significant proportion of CBD Shoppers probably had no familiarity with the CBD's newest specialty shops (Fifth Avenue Place, Oxford Centre, or PPG Place).

While 29% of the CBD Shoppers had "no opinion" about the merchandise at these shops, a majority [55%] of those that did rated the Specialty Shops "better" or "much better" than those at the malls.

There was no basis for saying that these shops were better or worse than those in any particular mall with which comparisons were being made.

These findings support the situation that existed at the time of the survey; there were no particularly unique boutiques or specialty shops [such as the Galleria in Mt. Lebanon] that were located outside the CBD. The CBD was the location for "high end" specialty shops in proximity to Major Retail Centers.

Strategies designed to attract shoppers to these "new" Specialty Shops, and others that might open, may result in high proportions of favorable comparisons with these malls.

3.3.4 DEPARTMENT STORES

Table 3-3, CBD Kaufmann's and Horne's Compared to Mall Locations

Rating:	Number of CBD Shoppers	[Percentage]
MUCH BETTER	32	[7%]
BETTER	155	[36%]
THE SAME	197	[46%]
WORSE	22	[5%]
MUCH WORSE	1	[<1%]
NO OPINION	28	[6%]
Valid Cases	435	[100%]

"How would you rate the merchandise at the Downtown Pittsburgh stores of Kaufmann's and Horne's compared to their stores in ....?"

While it is evident that over 90% of the CBD Shoppers rated the CBD's two major department stores as "the same" as or "better" than their stores at the malls, a slightly higher percentage of Ross Park and South Hills Village respondents rated the CBD's stores as "better".

Marital status was the only demographic factor of statistical significance. Of those respondents with an opinion on this comparison, a significantly higher proportion [55%] of married respondents rated the CBD's department stores as "better" or "much better"; a significantly higher percentage [58%] of single respondents rated the stores as "the same". The merchandise sought, in general, by families may be present in larger quantities and more variety in the "flag ship" stores than at their branches.

Indeed, the Central Business District's Department Stores and Specialty Shops should, according to prevailing wisdom and theory, be rated higher than competing stores or branch stores. The fact that such a low proportion of respondents rate the outlying stores as "better" supports the prevailing wisdom and theory. CBD Shoppers are relatively pleased with the merchandise at the "flag ship" Department Stores in the CBD compared to the their suburban branches at the malls.

3.3.5 SERVICE IN SPECIALTY & DEPARTMENT STORES

Table 3-3, Service in Specialty Stores

Rating:	Number of CBD Shoppers	[percentage]
MUCH BETTER	8	[2%]
BETTER	76	[18%]
THE SAME	254	[60%]
WORSE	41	[9%]
MUCH WORSE	2	[<1%]
NO OPINION	46	[11%]
Valid Cases	427	[100%]

"And how about service? Would you rate the service in Downtown Pittsburgh's SPECIALTY and DEPARTMENT stores as "worse", "better", or "about the same" as the service found in the specialty stores at....?"

Service in "flag ship" department stores and specialty stores that are associated with Major Retail Centers like downtown Pittsburgh is suppose to be one of these stores' competitive advantages. Merchants are frequently making this point. The findings from the questions displayed in the tables hinge on the respondents' awareness of service.

Table 3-3, Service in Department Stores

Rating:	Number of CBD Shoppers	[percentage]
MUCH BETTER	6	[1%]
BETTER	68	[16%]
THE SAME	289	[67%]
WORSE	40	[9%]
MUCH WORSE	1	[<1%]
NO OPINION	28	[7%]
Valid Cases	432	[100%]

"And how about service? Would you rate the service in Downtown Pittsburgh's SPECIALTY and DEPARTMENT stores as "worse", "better", or "about the same" as the service found in the Department Stores [both Kaufmann's & Horne's] at ....?

Over 70% of the CBD Shoppers rated "service" in both types of CBD stores as either "the same" as the malls or had "no opinion". This high percentage raises questions about shoppers' awareness of service or store personnel. Based on responses to other comparisons it is very likely that the respondents meant what they said: they did not rate service as better or worse at CBD or mall stores.

If respondents meant to say that service is "the same", a determination should be made about the relative level of service at these different locations. If there is a difference, further investigation would be warranted about shoppers' awareness of service. With today's self service discount department stores shoppers may be more accustomed to shopping on their own and store managers may not stress service as much as they might have in an earlier era.

In spite of this indifference or lack of distinction regarding service, the CBD's stores were assessed -- by those who had an opinion other than "the same" -- favorably on this trait.

> There were nearly twice as many respondents who rated the CBD stores' service "better" than there were respondents who rated it "worse" than the malls.

Higher proportions [about 15%] of respondents who were comparing the CBD's stores to stores at Ross Park and South Hills Village, although not with statistical significance, rated service at both types of stores "worse" in the CBD.

3.3.6 CONVENIENCE OF ACCESS TO SHOPPING

Table 3-3, Access Convenience Comparison, CBD and Malls

Convenience	Number of CBD Shoppers	[Percentage]
MUCH LESS	154	[35%]
LESS	134	[30%]
THE SAME	34	[8%]
MORE	51	[12%]
MUCH MORE	53	[12%]
NOT KNOWN	13	[3%]
Valid Cases	439	[100%]

"How would you rate the convenience of getting INTO Downtown Pittsburgh to shop in comparison to....?"

A clear majority [65%] of the CBD Shoppers rate the CBD as "much less" or "less" convenient than the malls to which they are making comparisons. There are two significant factors that help to explain this finding: 1) residential or work place location of the shopper and 2) familiarity with the CBD.

A significantly high proportion [47%] of CBD Shoppers who are City residents rate the CBD as "more" or "much more" convenient than the malls to which they are comparing the CBD. Conversely, over three quarters of the CBD Shoppers who are NOT City residents rate the CBD as "much less" or "less" convenient.

The same finding does not apply to CBD Shoppers who are employed.

If their work place is located outside the City, 62% report that CBD shopping is "much less" or "less" convenient for them.
If their work place is located in the City or in the CBD, itself, more report that getting into the CBD is "much less" or "less" convenient than reporting that it was "more" or "much more" convenient. While City and CBD workers may know their way in and out of these places and while they do shop in the CBD, they do NOT rate it as convenient for shopping as suburban malls. Their familiarity with the CBD does not translate into a "more convenient" rating for CBD shopping.

This is also the case for recent CBD shoppers. Although significantly higher proportions of CBD Shoppers who have shopped in the CBD during the last month rate the CBD's convenience more favorably than less recent CBD Shoppers, 58% of them still rate it "less" or "much less" convenient than malls. Of course, 90% of the CBD shoppers who have not shopped in the CBD in the last year rate it "less" or "much less" convenient!

The key point is that neither City residents, City workers, CBD Workers, or relatively recent CBD Shoppers consider the CBD to be more convenient than the malls.

These facts support the earlier finding that the CBD is neither the most nor second most frequently visited MRC for a majority of City residents or workers. Convenience is certainly one of the impediments to CBD shopping.

3.3.7 PARKING PROBLEMS

In addition to the noted difficulties associated with getting in and out of the CBD relative to suburban malls, a clear majority [59%] of CBD Shoppers reported experiencing parking problems in the CBD. No attempt was made to compare CBD parking with mall parking. Age was a significant factor. Significantly high proportions [61%] of teenagers and people over 65 years old reported that parking was NOT a problem. Higher proportions of people between 20 and 65 years old reported that parking WAS a problem[26].

Table 3-3, Parking Problems

"Is parking in Downtown Pittsburgh a problem for you?"

Rating:	Number of CBD Shoppers	[percentage]
NO	180	[41%]
YES	255	[59%]
	Valid Cases 435	[100%]

"IF SO, WHY?"

Reasons:	Responses	[Percentage]
LACK OF SPACES	143	[57%]
PARKING IS TOO EXPENSIVE	131	[52%]
TRAFFIC AROUND GARAGES	24	[10%]
GARAGES TOO FAR FROM STORES	24	[10%]
DISLIKE GARAGES	11	[4%]
OTHER	10	[4%]
SAFETY IN GARAGES	8	[3%]

Total Responses by 251 Respondents: 351

The major parking problems are a "lack of spaces" and parking charges or some combination of the two. The remaining reasons were related to parking garages. Traffic congestion at garages and the proximity of garages to stores were mentioned, respectively, by ten percent of those who reported experiencing a parking problem. Less than 5% of the respondents said they "disliked" or "feared being in" garages. Only 3% of the respondents mentioned "safety in garages" as a parking problem.

3.3.8 IMAGE AND APPEARANCE

Table 3-3, Image and Appearance Comparison

Rating:	Number of CBD Shoppers	[Percentage]
MUCH BETTER	47	[11%]
BETTER	111	[26%]
THE SAME	113	[26%]
WORSE	111	[26%]
MUCH WORSE	11	[2%]
NO OPINION	42	[9%]
Valid Cases	435	[100%]

"How would you rate the general image and appearance of Downtown Pittsburgh compared with....?"

One might conclude that respondents presented an ambiguous assessment of the CBD's image and appearance; 35% of the respondents report that it is "the same" as the malls or have no opinion, 36% say the CBD is "much better" or "better", and the remaining 28% say it is "worse". Respondents were of almost equal minds. Indeed, there is no demographic factor that explains these findings.

Table 3-3, Image and Appearance: CBD vs. Four Malls

CBD Compared to	Percentage of CBD Shoppers by Mall CBD is rated as being:	
Monroeville [n=109]	Better	52%
	Same	30%
	Worse	18%
South Hills [n= 72]	Better	39%
	Same	28%
	Worse	33%
Ross Park [n=107]	Better	38%
	Same	20%
	Worse	42%
Century III [n= 89]	Better	29%
	Same	38%
	Worse	33%

However, one factor is statistically significant: the mall to which the respondents are comparing the CBD's image and appearance.

There are statistically significant differences among respondents on the basis of the mall to which they are comparing the CBD's image and appearance. Table 3-3 depicts these differences.

CBD versus Monroeville Mall

A clear majority [52%] of the CBD Shoppers who are comparing the CBD to Monroeville Mall consider the CBD's image and appearance to be better than the Mall's. Additionally, 30% of these respondents consider the images and appearances to be "the same".

CBD versus Ross Park Mall

CBD Shoppers who are comparing the CBD and Ross Park Mall are, for all intents and purposes, divided on this issue. Almost equal proportions rate the image and appearance of the CBD to be better [38%] or worse [42%] than Ross Park Mall. A fifth of these respondents rate image and appearance to be "the same".

CBD versus South Hills Village and Century III Mall

CBD Shoppers who are comparing the CBD to either South Hills Village or Century III Mall are, at least in proportionate terms, very similar to the respondents who are making the comparison with Ross Park. The major difference is that higher proportions of these respondents rate the images and appearances to be "the same".

"Image and appearance" are terms that are difficult to assess with objectivity, especially in telephone interviews. There is always the possibility that respondents' meanings will vary. It is, therefore, significant that this was the one phrase that, from a statistical perspective, allowed discrimination on the basis of the mall to which the CBD was being compared.

It is clear that respondents' ratings must have been comparative. The malls whose image and appearance are rated lower than the CBD's by relatively high proportions of respondents are older malls. People may be responding in part to newness. This "newness" may be an important element in a CBD revitalization strategy. Perhaps suburban residents who live in proximity to these older malls would be attracted to "newer" CBD shopping opportunities.

3.3.9 CONVENIENCE INSIDE THE DISTRICT

Table 3-3, Shopping Convenience

Convenience	Number of CBD Shoppers	[percentage]
MUCH LESS	125	[30%]
LESS	204	[48%]
THE SAME	40	[10%]
MORE	42	[10%]
MUCH MORE	9	[2%]
Valid Cases	420	[100%]

"How would you rate the convenience of shopping IN Downtown Pittsburgh [getting from place to place within the downtown area] compared with shopping in....?"

Almost 80% of the CBD Shoppers rate the convenience of shopping in the CBD as "less" or "much less" convenient than the malls. Since the interior spaces at most malls has been explicitly designed to facilitate shoppers' movements and to encourage shopping, it is hardly surprising that such an overwhelming majority of CBD Shoppers rate the malls superior to the CBD in this respect.

This finding is supported for every mall to which the respondents were comparing the CBD; Ross Park respondents rated the CBD "less" or "much less" convenient in this respect in even higher proportions [84%].

In addition there is evidence that higher proportions [83%] of CBD Shoppers from higher income households [those earning $30,000 or more] rate the CBD "much less" or "less" convenient than the proportion [74%] of respondents whose household incomes are below $15,000.

The shoppers who would be likely to spend the most are also the people who are most likely to rate the CBD as "less" convenient than the malls.

3.3.10 SAFETY & SECURITY

Table 3-3, Comparison of Safety and Security, CBD and Malls

Rating:	Number of CBD Shoppers	[Percentage]
MUCH LESS SAFE	72	[17%]
LESS SAFE	205	[47%]
THE SAME	69	[16%]
SAFER	38	[9%]
MUCH MORE SAFE	3	[<1%]
NOT KNOWN	49	[11%]
Valid Cases	436	[100%]

"How would you rate the safety and security of Downtown Pittsburgh compared with....?"

Although safety concerns were relatively low on respondents' listings of the CBD's worst shopping aspects, almost 65% of the CBD shoppers rated safety and security in the CBD as being "less" or "much less" than in the malls. This finding was supported for all malls and all demographic factors, including gender. Women were just as likely as men to say that the CBD was more or less safe than a mall. This issue is not a women's issue!

Respondents who expressed strong feelings about Downtown safety and security were invited to be specific about their concerns. Of the 79 people, who made 101 responses, at least two thought the CBD was "much safer" [they reported car theft -- although not necessarily their own -- at the malls].

Of the remainder, there was relatively little specificity to their answers. Fifty responses expressed concerns about "dangerousness" in general, on the streets, or at night in the CBD. About 20% of the responses referred to undesirable people or crowds as concerns. Eleven responses suggested the need for more security [a CBD improvement that is discussed in the next section]. There were only 3 responses that expressed explicit concerns about the security in parking garages.

3.4 SUMMARY

Of all the tested comparisons between the CBD and the malls "Safety and Security" earned the least favorable rating for the CBD. This table summarizes CBD Shoppers' comparative assessments of the CBD to the malls.

Table 3-3, Comparisons Between the CBD and the Malls Ranked by Percentage of CBD Shoppers Favoring the CBD

Characteristic Being Compared	CBD Shoppers who Report that CBD is Better or Worse than the Malls	
Department Stores	187	[43%]
	23	[5%]
Specialty Shops	165	[39%]
	54	[12%]
Image and Appearance	158	[37%]
	122	[28%]
Prices, Quality, and Variety	137	[32%]
	48	[10%]
Shopping in General	110	[25%]
	215	[49%]
Convenience to Shopping Area	104	[24%]
	288	[65%]
Specialty Store Service	84	[20%]
	48	[11%]
Department Store Service	74	[17%]
	41	[9%]
Convenience within Shopping Area	51	[12%]
	329	[78%]
Safety and Security	42	[10%]
	277	[64%]

CBD is Better than the Malls
CBD is Worse than the Malls

It reveals that relatively high proportions of CBD Shoppers rate CBD stores, the "prices, quality, & variety" of their merchandise, and the CBD's "image & appearance" as "better" than the malls. While a quarter of the CBD Shoppers rate the CBD's "shopping in general" and "convenience" to be "better" than the malls, about twice as many rate these characteristics as "worse" than the malls.

A majority of CBD Shoppers have rated Specialty store and Department store service to be "the same" in CBD and mall stores.

It may be that people are unaware of service since the standard in many stores is "self - service". "Safety & Security" and "convenience within the district" are rated as being better at the malls by a majority of CBD Shoppers.

These comparative assessments of the CBD relative to suburban malls put into perspective the compliments and criticisms expressed, in general, about CBD shopping.

Over two thirds of the CBD Shoppers "agreed" or "strongly agreed" with the premise that shopping in Downtown Pittsburgh was an enjoyable experience; over three quarters of the Non CBD Shoppers "disagreed" or "strongly disagreed" with the premise. This finding supports the notion that people's shopping behavior is related to the degree that they enjoy the shopping experience.

In general, respondents praised those aspects of CBD shopping that are associated with the stores: price, variety, quality, and mix.

They criticized those aspects of CBD shopping that are traditionally associated with dense concentrations of jobs and stores, and to which consumers look to government for solutions: transportation access and traffic congestion and lack of and price of parking.

Although most CBD Shoppers agree that the CBD has improved or at least remained the same in the last five years, nearly three quarters of the CBD Shoppers are buying the same or less in the CBD than they did five years ago.

The next chapter presents findings about these shoppers' reactions to potential CBD improvements that may address their complaints and build on these features that they have praised.

4 CBD IMPROVEMENTS: WILL THEY ALTER SHOPPING PATTERNS?

4.1 THE POTENTIAL IMPROVEMENTS

There are a variety of improvements that can be made in commercial districts regardless of their size. These improvements, and the expenses and investments that are associated with them, should be made on the basis of some understanding of shoppers' reactions. We attempted to test Allegheny County shoppers reactions to a set of potential improvements that might be made in the Pittsburgh CBD. The interviewers asked:

> **"Now I'm going to read a list of possible improvements that might be made to PITTSBURGH'S DOWNTOWN shopping district. I'd like you to tell me if each of these improvements would make you SHOP in DOWNTOWN PITTSBURGH "a lot more", "a little more", or "about the same" as you do now. If you are NOT a Downtown Pittsburgh Shopper, I'd like you to tell me if you would consider shopping in Downtown Pittsburgh if each of the following improvements was made."**

Each potential improvement was presented to the respondent using the same description. There was no way that the respondent knew what type of improvement was about to be proposed. We present the results in the same order that the respondents heard the improvements.

After all the potential improvements were presented, respondents were invited to select the improvement that would be "most important" to them and that would encourage them to shop more in the CBD.

4.1.1 BETTER PARKING ARRANGEMENTS:

Better parking arrangements (such as more spaces, easier to find garages, cheaper rates for shoppers) was the first type of improvement that was tested; it was very popular among respondents regardless of whether they were CBD or Non CBD Shoppers.

Over 70% of CBD Shoppers reported that such an improvement would encourage them to shop more in the CBD; 64% of the Non CBD Shoppers reported that such an improvement would encourage them to consider shopping in the CBD.

Table 4-1, Reported Impact of Better Parking Arrangements on CBD Shopping

Response:	Number of CBD Shoppers	[%]
ABOUT THE SAME	128	[29%]
A LITTLE MORE	135	[30%]
A LOT MORE	181	[41%]
	Valid Cases 444	[100%]

Response:	Number of Non CBD Shoppers	[%]
NO	79	[36%]
YES	142	[64%]
	Valid Cases 221	[100%]

There were some interesting demographic differences among the respondents on this proposal. A statistically significant proportion of respondents from high income households reported that their shopping in the CBD would increase if this improvement were made.

Almost half [47%] of the CBD Shoppers who reported household incomes in excess of $ 30,000 reported that such an improvement would encourage them to shop a "LOT MORE" in the CBD. Another third of these respondents reported they would shop a "little more" if such an improvement were made.

Reinforcing this finding is another statistically significant finding about the respondents' ages.

Significantly higher proportions of older people, particularly those over 65 years old, report that such an improvement would make NO difference in their shopping in the CBD. However, significantly high proportions of respondents whose age is between 30 and 45 years old report that they would increase their CBD shopping if this improvement were made. Both of these findings are supported for both CBD and Non CBD Shoppers.

Very high proportions of all respondents have said that they would shop more in the CBD if "Parking Arrangements" were improved. Furthermore, significant proportions of respondents who are in their 30's and early 40's and from affluent households [earnings in excess of $ 30,000] report they would shop more in the CBD if these improvements were made.

The well paid, "baby boomers" appear to be the segment whose CBD shopping may be increased if this set of parking improvements is undertaken.

4.1.2 SALES & PROMOTIONS

Table 4-2, Impact of "CBD - Wide" Sales and Promotions

Response:	Number of CBD Shoppers	[%]
ABOUT THE SAME	180	[41%]
A LITTLE MORE	157	[35%]
A LOT MORE	104	[24%]
Valid Cases	441	[100%]

Response:	Number of Non CBD Shoppers	[%]
NO	136	[61%]
YES	86	[39%]
Valid Cases	222	[100%]

CBD - Wide Sales and Promotions were the second potential improvement that was tested. The idea was that all, or at least most, CBD stores would have coordinated sales or other types of shopping promotions.

Almost 60% of CBD Shoppers report that they would shop more in the CBD if a "CBD - Wide" Sales and Promotion Program were offered; however, only a quarter of these respondents said they would shop "a lot more" and only 39% of the Non CBD shoppers said they would consider CBD shopping if such a promotion were offered.

There were no statistically significant demographic factors that were observed among the responses of either CBD or Non CBD Shoppers. In other words this finding is supported "across the board".

4.1.3 CLEANER, MORE ATTRACTIVE SURROUNDINGS

Table 4-3, Impact of Cleaner, More Attractive Surroundings

Response:	Number of CBD Shoppers	[%]
ABOUT THE SAME	171	[39%]
A LITTLE MORE	156	[36%]
A LOT MORE	112	[25%]
Valid Cases	439	[100%]

Response:	Number of Non CBD Shoppers	[%]
NO	136	[62%]
YES	85	[38%]
Valid Cases	221	[100%]

A major clean up, sidewalk, and public space improvements campaign that would endeavor to make the general surroundings in the CBD more attractive was the third potential improvement that was tested.

While it is true that 61% of CBD Shoppers report that they would shop more in the CBD if the CBD were cleaner and had more attractive sidewalks and public spaces, only a quarter of these respondents said they would shop "a lot more" and only 38% of the Non CBD shoppers said they would consider CBD shopping if such a promotion were offered.

There were no statistically significant demographic factors that were observed among the responses of either CBD or Non CBD Shoppers. This finding is supported "across the board".

4.1.4 MORE VISIBLE SECURITY

Seventy percent of the CBD Shoppers reported that they would shop more in the CBD if a more visible security program, such as increased police patrols, were in place. Non CBD Shoppers were evenly divided on this proposition.

There was one statistically significant difference among respondents: male and female responses on this proposition were proportionately different. While two thirds of the CBD Shoppers are female; over three quarters of the respondents who said, they would shop "a lot more" in the CBD if this improvement were made, were women.

Table 4-4, Impact of Security Patrols

Response:	Number of CBD Shoppers	[%]
ABOUT THE SAME	134	[30%]
A LITTLE MORE	153	[35%]
A LOT MORE	154	[35%]
Valid Cases	441	[100%]

Response:	Number of Non CBD Shoppers	[%]
NO	111	[50%]
YES	110	[50%]
Valid Cases	221	[100%]

While female respondents were not, at least in statistical terms, significantly different from males when comparing the CBD's "safety and security" to the malls, they are indicating here that they would shop more in the CBD if the security were more visible. This finding is not supported for Non CBD Shoppers.

<u>An Interpretation:</u> Women may be reflecting an underlying fear for safety while shopping in general. Maybe respondents would also respond in a similar fashion if visible security were in place at the malls. Maybe, there is an underlying fear for safety while shopping, or in general, that warrants much more careful investigation. This is probably not only a CBD or a womens' issue.

4.1.5 A NEW INDOOR SHOPPING MALL

The potential construction of a new indoor mall "similar to a large suburban mall with a $3.00 parking charge for a half day's shopping trip" caught the attention of respondents; 65% of CBD Shoppers report that they would shop more in the CBD if this potential improvement were made and just over a quarter of these respondents said they would shop "a lot more". The Non CBD Shoppers were, for all intents and purposes, evenly divided on considering CBD shopping if such an improvement were offered.

Table 4-5, Impact of New Shopping Mall with Parking Charge

Response:	Number of CBD Shoppers	[%]
ABOUT THE SAME	152	[35%]
A LITTLE MORE	174	[39%]
A LOT MORE	116	[26%]
Valid Cases	442	[100%]

Response:	Number of Non CBD Shoppers	[%]
NO	116	[52%]
YES	105	[48%]
Valid Cases	221	[100%]

Even though these proportions may not support such an improvement there are some demographic factors that are statistically significant and that might warrant attention. Older respondents, regardless of being CBD or Non CBD Shoppers, reported that such a proposal would not affect their CBD shopping -- i.e., they would buy "about the same" in the CBD or "not consider" shopping there. On the other hand significantly higher proportions of younger respondents report that they would shop "a lot more" in the CBD if this improvement were made. Almost forty percent of the CBD Shoppers under the age of 30 and 35% of the single respondents, report they would shop "a lot more" in the CBD if this improvement were made. Over forty percent of the CBD Shoppers over the age of 45, report that they would do "about the same" amount of CBD shopping if this improvement were made; 46% of the CBD Shoppers between the ages of 30 and 45 report they would do "a little more" CBD shopping if this improvement were made.

A similar pattern exists among Non CBD Shoppers; however, it is more dramatic: 84% of the respondents who are over 65 years old report that they would not consider shopping in the CBD if this improvement were made. Over half [55%] of the remaining Non CBD Shoppers indicated a willingness to consider CBD shopping if this improvement were made.

This kind of a "mall in the city" with its $3.00 parking fee for half a day would appear to appeal to and to have the potential to attract young people, particularly singles, in relatively high proportions. It will not attract a disproportionate share of older people or retirees.

<u>Sensitivity to the Parking Charge</u>

Respondents' sensitivity to the parking charge associated with this potential improvement was tested by presenting the same scenario except that interviewers said "<u>there would be free parking</u>". Free parking in conjunction with the "mall in the city" proposition had a clear effect on respondents' indications of CBD shopping: 80% of the CBD Shoppers (and 68% of the Non CBD Shoppers) indicated they would shop more (or consider shopping) in the CBD if this proposal were enacted.

This response is dramatic; as depicted in Table 4-6, over half of the CBD Shoppers say they would buy "a lot more" in the CBD. Even the demographics of the positive respondents changed. There are fewer older respondents who, in contrast to the prior proposition, claim the "mall in the city" will not attract their shopping. This suggests that "free parking" may be attractive to older potential shoppers, the group that was not as enthusiastic to the proposition with the $3.00 parking fee.

Table 4-6, Impact of a New CBD Mall with Free Parking

Response:	Number of CBD Shoppers	[%]
ABOUT THE SAME	85	[20%]
A LITTLE MORE	113	[26%]
A LOT MORE	236	[54%]
Valid Cases	434	[100%]

Response:	Number of Non CBD Shoppers	[%]
NO	70	[32%]
YES	152	[68%]
Valid Cases	222	[100%]

The influence of this proposal with free parking can also be seen by analyzing the changes among those respondents who said the mall with the parking charge would not influence their CBD shopping; 44% of these people said they would shop "a little" (29%) or "a lot" (15%) more if the mall were in the CBD and the parking was free.

Table 4-7, Sensitivity of Responses to Free Parking at a CBD Mall

Responses with the $3 Parking	Responses with Free Parking: The Same		A Little More		A Lot More		Total	
The Same	85	56%	43	29%	23	15%	151	100%
A Little More			72	42%	101	58%	173	100%

Table 4-7 also shows that 58% of those respondents who said they would shop "a little" more if the mall with the parking charge were imposed intensified their statements: they would shop "a lot" more in the CBD if the mall's parking were free.

The change from a $3.00 parking charge to free parking has a significant impact on CBD and Non CBD Shoppers in terms of their willingness to shop more in the CBD if a mall were built.

4.1.6 A NEW REALLY NICE DEPARTMENT STORE

Table 4-8, Impact of a Really Nice Department Store

Response:	Number of CBD Shoppers	[%]
ABOUT THE SAME	132	[30%]
A LITTLE MORE	142	[32%]
A LOT MORE	167	[38%]
Valid Cases	441	[100%]

Response:	Number of Non CBD Shoppers	[%]
NO	147	[67%]
YES	74	[33%]
Valid Cases	221	[100%]

While 70% of the CBD Shoppers report that a new department store, like a large "New York" Saks Fifth Avenue or a Bloomingdales or a Neiman Marcus, with an expensive line of merchandise would result in their shopping more in the CBD, only a third of the Non CBD Shoppers report that they would consider CBD shopping if such a store opened. This improvement, at least on its own merits, would not draw a majority of Non CBD Shoppers into the CBD.

However, over 55% of the CBD Shoppers who report that they would buy "a lot more" in the CBD if this improvement were made have the most recent CBD shopping experience [i.e., they have shopped in the CBD during the last month] or come from households with incomes in excess of $ 30,000; 78% of the CBD Shoppers who report household incomes in excess of $ 30,000 claim they would shop more in the CBD if this sort of department store were there. In addition, it was also determined that significantly high proportions of CBD Shoppers who reported they would buy "a lot more" were women.

These findings support the proposition that a department store of this type would increase the buying of CBD Shoppers in the CBD. Sales volume could be expected to increase for merchandise that would appeal to women from relatively affluent households.

4.2 SUMMARY - CBD Improvements; Will They Make a Difference?

Respondents were invited to select the potential improvement that would be most important to getting them to do downtown shopping more often. Both CBD Shoppers and Non CBD Shoppers, in general, agreed on these assessments.

There were two notable exceptions. First, when Non CBD Shoppers said "None of the Above" they meant that "nothing would get me to the CBD!" This response, which should be viewed clearly, was expressed by about a quarter of all these respondents. When added to the handful of similar responses from CBD Shoppers, it means that 10% of Allegheny County's residents share the view that, regardless of the improvement, they would not come to the CBD to shop or to shop more.

Second, it is very clear that the top three potential improvements (better parking arrangements, an indoor mall with free parking, and a really nice new department store) are supported by a majority of CBD and Non CBD Shoppers and, based on the overall statements about buying more in the CBD, would attract higher sales volumes.

It is important to realize that "parking" and "store mix" are prominent elements in these three potential, but not mutually exclusive, improvements.

CBD Shoppers seem to be saying: "We would shop more in the CBD if you [government, developers and merchants] did something about what we value [shopping opportunities -- stores in a mall and a "good" department store] and what we do not accept [parking problems -- lack of spaces and rates that are too high!].

Table 4-9, Comparison of Possible Improvements

Possible Improvement:	Number of CBD Shoppers	Non CBD Shoppers	Total Respondents
BETTER PARKING ARRANGEMENTS: SUCH AS MORE SPACES, EASIER TO FIND GARAGES, CHEAPER RATES FOR SHOPPERS	123 [19%]	55 [8%]	178 [27%]
A NEW INDOOR SHOPPING MALL SIMILAR TO A LARGE SUBURBAN SHOPPING MALL <u>WITH FREE PARKING</u>	120 [18%]	60 [9%]	180 [27%]
A NEW REALLY NICE DEPARTMENT STORE LIKE A "NEW YORK" SAKS FIFTH AVENUE OR A NEIMAN - MARCUS OR BLOOMINGDALES	96 [14%]	17 [3%]	113 [17%]
MORE VISIBLE SECURITY PATROLS ON DOWNTOWN STREETS	49 [7%]	23 [3%]	72 [11%]
CLEANER, MORE ATTRACTIVE SIDEWALKS & PUBLIC SPACES	24 [4%]	6 [1%]	30 [5%]
SALES & PROMOTIONS BY ALL THE MAJOR STORES AT THE SAME TIME	15 [2%]	3 [<1%]	18 [3%]
A NEW INDOOR SHOPPING MALL SIMILAR TO A LARGE SUBURBAN SHOPPING MALL <u>WITH A $3.00 PARKING CHARGE FOR A HALF DAY SHOPPING TRIP</u>	3 [<1%]	3 [<1%]	6 [<1%]
NONE OF ABOVE	14 [2%]	53 [8%]	67 [10%]
ALL Shopper responses	444 [67%]	220 [33%]	664 [100%]

"Of the possible improvements, I just mentioned, which <u>one</u> would be the <u>most important</u> to you in getting you to come to PITTSBURGH'S DOWNTOWN shopping district more often?"

With one exception CBD and Non CBD Shoppers' improvement priorities are the same. The key distinction between these priorities is that significantly high proportions of CBD Shoppers value a "New Department Store" while significantly high proportions of Non CBD Shoppers say "None of the Above".

To summarize: Over half of the CBD Shoppers and over two thirds of the Non CBD Shoppers claim that they would "shop a lot more" or seriously "consider CBD shopping" if a new indoor shopping mall similar to a large suburban mall with free parking was in the CBD.

Providing better parking arrangements, a new really nice department store, and visible security are also claimed to be factors that would increase shoppers' CBD shopping.

After asking respondents to comment on, and indicate preferences for, the proposed potential improvements, they were invited to mention anything else that, if done, would make them come to the CBD more often. Nearly eighty percent of all respondents said, "No, nothing!" Various types of transportation improvements that would remedy traffic congestion or access to the CBD were most prominently mentioned by respondents who suggested other improvements[27].

5 OTHER ASPECTS OF DOWNTOWN RETAIL REVITALIZATION

Eating dinners or attending special events in Downtown Pittsburgh are ways in which Allegheny County residents become acquainted with or enjoy downtown Pittsburgh. This survey has dimensioned the proportions of Allegheny County residents participating in these aspects of Downtown Pittsburgh's activities.

Their participation in special events is particularly important to downtown retailing because these events bring crowds and audiences to the CBD; they have favorable economic impacts on other downtown businesses such as stores and restaurants.

These events could become important elements of a Downtown Commercial Revitalization initiative. They have direct and potentially indirect effects on commercial revitalization since they serve to expose people who might not otherwise visit the CBD to the variety of ways they can enjoy Pittsburgh.

5.1 DOWNTOWN RESTAURANTS FOR DINNER

It is generally acknowledged that the restaurant business is among the most demanding and fragile business undertakings. There are an extraordinarily complex array of factors that lead to a restaurant's success. Among those factors are reputation, location and price.

Downtown Pittsburgh restaurants cater to a variety of market segments including, but certainly not limited to, the luncheon business that is generated by the high density of CBD workers, the special event segment [as mentioned in Section 5.2], and the "out of town" diner -- i.e., people that are business visitors or tourists in the City.

As part of our survey we were interested in discovering the degree to which the representative sample of Allegheny County people used downtown Pittsburgh restaurants for dinner. Respondents were, first, invited to tell us how many times a month they usually went out to eat dinner at a "sit down" restaurant: 90% of the respondents reported going out at least once a month.

While significantly higher proportions of people from households with high household incomes reported going out to dinner, 80% of those from the lowest income category [under $15,000] also reported going out to dinner at least once a month. There were no other statistically significant demographic factors.

As Table 5-1 illustrates, more than a third [36%] of all respondents reported going out to dinner at least once a week.

Table 5-1, Frequency of Going Out to Eat Dinner

Frequency	Number [Percent] of All Respondents
NOT MONTHLY	65 [10%]
ONCE A MONTH	162 [24%]
2 or 3 TIMES	197 [30%]
ONCE A WEEK	116 [17%]
>ONCE A WEEK	129 [19%]
Valid Cases	669 [100%]

Those respondents who ate dinner at a restaurant at least once a month were then asked if during the last year they had gone out to eat dinner at a restaurant in Downtown Pittsburgh. Almost half [46%] of the respondents who reported going out to dinner at least once a month, reported that they had dined at a downtown Pittsburgh restaurant in the last year.

Significantly higher proportions of "CBD restaurant go-ers" were from higher income households. While 55% of the "CBD restaurant go-ers" were from households with incomes in excess of $30,000, 67% of the "Non CBD restaurant go-ers" were from households with incomes below $30,000.

Table 5-2, Household Income of "CBD Restaurant Go-ers"

Income Group	Number of Respondents	[%]	Percentage of Group
Under $15,000	23	9%	[23%]
$15 - $30,000	92	36%	[42%]
$30 - $60,000	103	41%	[55%]
Over $60,000	36	14%	[69%]
Valid Cases	254	100%	

Another demographic factor that distinguishes CBD from Non CBD "restaurant go-ers" is age. Relatively low proportions [28%] of Seniors [people over 65 years old] report dining at CBD or Station Square restaurants. About half of the people in other age groups, as presented in Table 5-3, report being "CBD restaurant go-ers".

Table 5-3, Age of "CBD Restaurant Go-ers"

Age Group	Number of Respondents	[%]	Percentage of Group
15 - 19	33	12%	[56%]
20 - 29	50	18%	[43%]
30 - 45	102	37%	[52%]
46 - 65	70	25%	[48%]
Over 65	23	8%	[28%]
Valid Cases	278	100%	

Another significant factor that is associated with CBD restaurant dining is CBD shopping; it is depicted in Table 5-4. Almost 85% of "CBD restaurant go-ers" are also "CBD Shoppers". Approximately a quarter of the "Non CBD Shoppers" are CBD restaurant go-ers.

Table 5-4, Relationships Between CBD Shoppers and CBD Restaurants

Ate Dinner at CBD Restaurant	CBD Shoppers		Non CBD Shoppers		Total	
YES	234	84%	44	16%	278	100%
NO	174	54%	149	46%	323	100%

All respondents, who reported dining at any restaurant at least once a month, were asked how much their meals cost on a per person basis.

Table 5-5, Usual Per Meal Cost of Dinner for CBD and Non CBD Restaurant Go-ers

Usual per Meal Cost	Number of All Responding Restaurant Diners	[pct.]
Less Than $5:		
CBD Go-er	38	[6%]
Non CBD Go-er	65	[11%]
$5 to $20:		
CBD Go-er	213	[35%]
Non CBD Go-er	247	[41%]
More Than $20:		
CBD Go-er	27	[5%]
Non CBD Go-er	11	[2%]
VALID CASES	601	[100%]

Over three quarters of all "restaurant go-ers" said their usual meal costs were between $5 and $20 per person; 17% reported meal costs below $5; and 6% reported per meal costs in excess of $20.

Table 5-5 shows that a higher proportion of respondents who are CBD restaurant diners, as should be expected on the basis of their household income characteristics, report that their usual meal costs are in excess of $20 per person[28]. They constitute, however, only 5% of the overall restaurant dining market.

5.1.1 MOST FREQUENTLY NAMED DOWNTOWN RESTAURANTS

Over three quarters of these downtown restaurant diners named the restaurants at which they ate these dinners; 212 respondents named 321 restaurants.

Table 5-6 reports, in descending order, the most frequently mentioned downtown restaurants[29].

Table 5-6, Eleven Most Frequently Mentioned Restaurants

Restaurants	Number of "Downtown Restaurant Go-ers" [Percentage]
TOP OF THE TRIANGLE	32 [15%]
KIKU [SSQ]	30 [14%]
KLEINS	29 [14%]
THE COMMON PLEA	25 [12%]
HOULIHANS [SSQ]	24 [11%]
F TAMBELLINI's	20 [9%]
BOBBY RUBINOS [SSQ]	18 [8%]
VISTA HOTEL	12 [6%]
THE CARLTON	11 [5%]
KAUFMANNS	11 [5%]
MAX AND ERMAS	10 [5%]

In order for a restaurant to be included in this table, it had to have been mentioned by 5% or more of the downtown restaurant diners.

As mentioned in the introduction to this section, there are many measures by which restaurants, in downtown Pittsburgh or anywhere else, can be, and are frequently, ranked.

No attempts to ask respondents about the frequency of their visits to specific restaurants or, indeed, to recite a pre-selected list of restaurants to them were made; no attempt to test whether people knew of, or had ever had dinner at, these restaurants was made. We simply asked them to recall the names of downtown Pittsburgh restaurants at which they had dined, if they had dined in the downtown area in the last year.

5.2 SPECIAL EVENTS IN THE DOWNTOWN

Another objective of this survey was to improve understanding about the linkages between attendance at special events in the CBD and the use of CBD stores and restaurants.

In the process of gathering these insights it was, of course, possible to get an idea of the degree to which these sorts of events "penetrate" the Allegheny County market[30].

There are four types of events about which information was sought:

1. Concerts, plays, or special performances [such as the circus or the Ice Capades] at either Heinz Hall, the Benedum, the Civic Arena, or Three Rivers Stadium;

2. Sports events at the Civic Arena [hockey, basketball, arena football, tennis, etc...] or at Three Rivers Stadium [the Steelers or the Pirates];

3. Theme Events for which an admissions fee is charged such as the Home & Garden Show, the Boat Show, the Car Show, or the Ethnic Food Festival at the Convention Center or the Dog Show at the Civic Arena; and

4. Civic events for which no admissions fee is charged such as the 3 Rivers Arts Festival, the Regatta, the Fourth of July Fireworks, St. Patrick's Day Parade, etc....

In addition to inviting each interviewee to comment on the frequency of attendance at these events, they were asked about the frequency of CBD shopping or restaurant usage when they did participate in these events. The following tables summarize findings about each of the four types of events.

Table 5-7, Proportion of All Respondents who Reported Attending a CBD Event in the Last Year

Event	Percentage of All Respondents
CONCERTS ETC...	53%
SPORTS EVENTS	49%
CIVIC [no fee] EVENTS	46%
THEME [fee] EVENTS	28%

With the exception of Theme Events the tested events attracted approximately half of all respondents at least once during the last year.

As Table 5-8 indicates*, participants at Civic Events in the CBD have the greatest likelihood of eating a meal or shopping in the CBD during their participation in that event. Participants at Sports Events have the lowest likelihood of doing these things.

While the range for participants who eat meals is from 23% to 33%, the range for participants who shop is greater [5% to 18%] although the percentages are lower. The highest rate for participants who also shop is 18% -- for those attending civic events -- while the lowest rate for those who eat a meal is 23% -- for those attending sports events.

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* This table contains an estimated percentage of participants in each event who would eat a meal or shop while participating. The percentage is based on a weighted probability of respondents' doing these activities [i.e., visiting either a restaurant or store in the CBD] on any occasion of attending a listed event. This indicator has been computed by the DCP staff, as follows:

> Using the Table, "Shopping Frequency as Part of Attending a Concert, Play, etc..] the weighted percentage is computed by multiplying the percentage of respondents in each frequency category by 1.0 [every visit], 0.75 [more than 50% of the visits], 0.25 [less than 50% of the visits], and 0.00 [never]. The product of these multiplications is 7.5% = [(0.0 * 87%) + (1.0 * 5%) + (0.75 * 1%) + (0.25 * 7%)].

Using the table, "CBD Restaurant Frequency as Part of Attending a Concert, Play, etc..", in a similar fashion provides the weighted percentages for the eating activity.

Table 5-8, Comparison of Eating and Shopping Activity for Associated with Events

Event	Percentage of Participants
CIVIC [no fee] EVENTS	
Eat Meals	33%
Shop	18%
CONCERTS	
Eat Meals	27%
Shop	10%
THEME EVENTS	
Eat Meals	24%
Shop	10%
SPORTS EVENTS	
Eat Meals	23%
Shop	5%

Very small proportions of those who reported attending events, with the exception of Civic Events, do shopping as a part of their participation. Over a quarter of those who report attending at least one "Civic Event" also report shopping in the CBD.

Of those who have attended events, over a third -- regardless of the type of event -- report eating a meal in a CBD or Station Square restaurant as part of the trip.

Attenders at "Civic Events" have the highest probability of also eating a meal at a CBD or Station Square restaurant. "Concert Go-ers" are the second most likely group.

In the following sections more specific information about the frequency of undertaking these activities and the demographic characteristics of the respondents is presented.

5.2.1 CONCERTS, PLAYS, OR SPECIAL PERFORMANCES

The first type of event that was considered consisted of concerts, plays, or special performances [such as the circus or the Ice Capades] at either Heinz Hall, the Benedum, the Civic Arena, or Three Rivers Stadium.

Over half [53%] of all respondents reported attending this type of event during the last year.

5.2.1.1 Characteristics of Participants

Respondents from households with high incomes were more likely to attend than others. There is a direct relationship in terms of the proportion of people who attend: 31% of respondents from households with incomes less than $15,000 have attended, while 74% of respondents from households whose income is in excess of $60,000 have attended. Table 5-9 presents these proportions as well as an indication of the number of attenders in each income category; for example, 39% of the attenders are from households that report earnings between $30,000 and $60,000.

Table 5-9, Household Income of ATTENDERS OF CONCERTS, ETC.

Household Income	Respondents	[Percentage]	Percentage of Each Income Group
Under $15,000	39	12%	[31%]
$15 - $30,000	118	37%	[49%]
$30 - $60,000	126	39%	[62%]
Over $60,000	39	12%	[74%]
Valid Cases	322	100%	

Age is also a significant factor that is best illustrated by the finding that 77% of the teenagers report attending, while 72% of the seniors report NOT attending this sort of event. However, teenagers and seniors, together, constitute only 22% of the attenders.

A significantly high proportion of people who report attending these types of events are also people that were classified as "CBD Shoppers". Over 60% of the CBD Shoppers report attending this type of event; 36% of Non CBD Shoppers report attending such events. Over three quarters of the attenders are also "CBD Shoppers".

5.2.1.2 Frequency of Participation

Table 5-10, Frequency of Event Attendance (CONCERTS,ETC.), During the Last Year

CONCERTS, ETC	Number of All Respondents	[Percentage]
NOT LAST YEAR	317	[47%]
ONCE OR TWICE	157	[24%]
3 TO 6 TIMES	111	[17%]
6+ TIMES	49	[7%]
"SUBSCRIBERS"	35	[5%]
Valid Cases	669	[100%]

As indicated in Table 5-10 , while almost half of the respondents did not attend any events of this type during the last year, about 12% of all respondents are frequent attenders or "subscribers". We made no systematic attempt to discover which types of concerts were attended.

5.2.1.3 Related Shopping or Dining Activities

As indicated in Table 5-11, there is little, if any, connection between attending these sorts of events and shopping in the CBD on the same occasion. Given the nature of the entertainment activity and its usual scheduling [evenings and weekends] there is relatively little connection between the shopping and concert going and, generally, little opportunity since the stores are frequently closed shortly before or after performance times .

Table 5-11, Shopping Frequency as Part of ATTENDING A CONCERT, ETC. During the Last Year

Frequency	Number of Respondents	[Percentage]
EVERY VISIT	17	[5%]
MORE THAN 50%	4	[1%]
LESS THAN 50%	25	[7%]
NEVER	306	[87%]
Valid Cases	352	[100%]

Eating meals before or after entertainment events like these is an activity that we would expect relatively high proportions of attenders to do.

Our question was whether, or to what degree, attenders ate these meals in the CBD or Station Square. As indicated in Table 5-12, more than a quarter reported eating that meal in the CBD or Station Square on "more than half" of their visits or on "every" visit.

Table 5-12, CBD Restaurant Frequency as Part of ATTENDING A CONCERT, PLAY, ETC., During the Last Year

Frequency	Number of Respondents	[Percentage]
EVERY VISIT	49	[14%]
MORE THAN 50%	42	[12%]
LESS THAN 50%	63	[18%]
NEVER	197	[56%]
Valid Cases	351	[100%]

The proportion of the most frequent attenders who ate these meals was 60%; this was significantly higher than the proportion of less frequent attenders, 40%.

5.2.2 SPORTS EVENTS

The second category of tested events were sports events at the Civic Arena [hockey, basketball, arena football, tennis, etc...] or at Three Rivers Stadium [the Steelers or the Pirates].

Approximately half of all respondents report attending a Sports event in the CBD during the last year. While 43% of the female respondents report attending, 63% of males report attending.

5.2.2.1 Characteristics of Participants

Respondents from households with high incomes were more likely to attend than others. There is a positive relationship between household income and attending sports events: 24% of respondents from households with incomes less than $15,000 have attended, while 64% of respondents from households whose income is in excess of $60,000 have attended. However, almost 80% of the attenders are from households with incomes between $15,000 and $60,000.

Table 5-13, Household Income of ATTENDERS OF SPORTS EVENTS

Household Income	Number of Respondents	[%]	Percentage of Income Group
Under $15,000	30	10%	[24%]
$15 - $30,000	125	41%	[52%]
$30 - $60,000	119	39%	[59%]
Over $60,000	34	10%	[64%]
Valid Cases	308	100%	

Age is also a significant factor. The younger the respondent, the more likely he is to be a sports event attender. This finding is best illustrated by the fact that 68% of the teenagers report attending, while 20% of the seniors report attending sport events. It should be noted, however, that teenagers constitute only 14% of these attenders.

A significantly high proportion of people who report attending sports events are also people that were classified as CBD Shoppers. Over 53% of the CBD Shoppers report attending this type of event; 40% of Non CBD Shoppers report attending sport events. Over seventy percent of Sports Event attenders are also "CBD Shoppers".

Table 5-14, Age of Attenders Going to SPORTS EVENTS

Age Group	Number of Respondents	[%]	Percentage of Age Group
15 - 19	44	13%	[68%]
20 - 29	86	26%	[68%]
30 - 45	118	36%	[55%]
46 - 65	60	19%	[36%]
Over 65	19	6%	[20%]
Valid Cases	327	100%	

5.2.2.2 Frequency of Participation

As indicated in Table 5-15, about 15% of all respondents are frequent attenders or "season ticket holders" of one of the profession teams. We made no systematic attempt to discover which types of sports events were attended or which team's season tickets were owned.

Table 5-15, Frequency of Attendance at SPORTS EVENTS During Last Year

SPORTS EVENT	Number of All Respondents	[Percentage]
NOT LAST YEAR	341	[51%]
ONCE OR TWICE	122	[18%]
3 TO 6 TIMES	106	[16%]
6+ TIMES	58	[9%]
"ALL GAMES"	42	[6%]
Valid Cases	669	[100%]

5.2.2.3. Related Shopping or Dining Activities

Table 5-16, Shopping Frequency as Part of ATTENDING A SPORTS EVENT

Shopping Frequency	Number of Respondents Who Attended a SPORTS EVENT During the Last Year	[%]
EVERY VISIT	8	[2%]
MORE THAN 50%	10	[3%]
LESS THAN 50%	12	[4%]
NEVER	298	[91%]
Valid Cases	328	[100%]

As indicated in Table 5-16, there is little, if any, connection between attending sports events and shopping in the CBD. Given the nature of sporting events there is probably little inclination by sports spectators to shop before or after a game. Furthermore, even if there were the inclination, sports events are usually scheduled in the evenings or on the weekends; there is little opportunity to shop in the CBD at those times since the stores are usually closed immediately before and after the games. Finally, both Three Rivers Stadium and the Civic Arena are near the CBD but are still a substantial distance from the major retail area.

Table 5-17, CBD Restaurant Frequency as Part of ATTENDING A SPORTS EVENT

Restaurant Frequency	Number of Respondents Who Attended a SPORTS EVENT During the Last Year	[%]
EVERY VISIT	41	[13%]
MORE THAN 50%	34	[10%]
LESS THAN 50%	46	[14%]
NEVER	206	[63%]
Valid Cases	327	[100%]

Concession stands at the sports arenas provide convenient food for many sports spectators. Accordingly, we anticipated that eating meals before or after games might not be as frequent as with concert going. Also, those who park near the Stadium or the Civic Arena are more likely to eat at a restaurant conveniently located along their route to or from the event, rather than eating in the center of the CBD. Our actual question was whether, or to what degree, attenders ate meals at a CBD or Station Square restaurant as part of going to or coming from the Sports Event.

As indicated in Table 5-17, almost a quarter reported eating that meal in the CBD or Station Square on "more than half" of their visits or on "every" visit. Less than half [46%] of the most frequent attenders reported eating meals at CBD or Station Square restaurants; the comparable proportion for less frequent attenders was 33%.

5.2.3 THEME EVENTS WITH ADMISSION FEES

Theme Events were the third type of event that was examined. These consist of events for which an admissions fee is charged such as the Home & Garden Show, the Boat Show, the Car Show, or the Ethnic Food Festival at the Convention Center or the Dog Show at the Civic Arena.

Only 28% of all respondents report attending this type of event in the CBD during the last year. While 26% of the female respondents report attending, 31% of males report attending.

5.2.3.1 Characteristics of Participants

Respondents from households with high incomes were more likely to attend than others. There is a significant statistical relationship in proportionate terms: 12% of respondents from households with incomes less than $15,000 have attended, while 34% of respondents from households whose income is in excess of $60,000 have attended.

Table 5-18, Household Income of Respondents in Income Groups that Report ATTENDING THEME EVENTS

Household Income	Number of Respondents	[%]	Percentage of Income Group
Under $15,000	15	9%	[12%]
$15 - $30,000	69	40%	[29%]
$30 - $60,000	72	41%	[36%]
Over $60,000	18	10%	[34%]
Valid Cases	174	100%	

As Table 5-18 illustrates, people from households with incomes between $30,000 and $60,000 are the highest proportion of attenders as well as the income group from which the highest proportion of attenders come.

Age is also a significant factor. Nearly a majority [44%] of the attenders are people between the ages of 30 and 45. With the exception of the seniors, 93% of whom report not attending these types of events, others attend in approximately equal proportions [27%].

A significantly high proportion of people who report attending these types of events are also people that were classified as CBD Shoppers. Approximately a third of the CBD Shoppers report attending this type of event; 17% of Non CBD Shoppers report attending sport events. Almost eighty percent of the attenders are "CBD Shoppers".

5.2.3.2 Frequency of Participation

As indicated in Table 5-19, just over 5% of the respondents report going more than 3 times a year to one of these "Theme Events". Almost a quarter report going once or twice a year; probably to one or two of the listed events.

Table 5-19, Frequency of Attendance, THEME EVENTS, During the Last Year

THEME EVENTS	Number of All Respondents	[Percentage]
NOT LAST YEAR	484	[72%]
ONCE OR TWICE	152	[23%]
3 TO 6 TIMES	30	[5%]
6+ TIMES	3	[<1%]
Valid Cases	669	[100%]

5.2.3.3 Related Shopping or Dining Activities

As indicated in Table 5-20, there is little, if any, connection between attending Theme Events and shopping in the CBD.

Table 5-20, Shopping Frequency as Part of ATTENDING A THEME EVENT

Shopping Frequency	Number of Respondents Who Attended a THEME EVENT During the Last Year	[%]
EVERY VISIT	13	[7%]
MORE THAN 50%	5	[3%]
LESS THAN 50%	11	[6%]
NEVER	156	[84%]
Valid Cases	185	[100%]

Depending on the Theme Event and its location, concession stands may provide ample menus for attenders. Accordingly, we anticipated that eating meals before or after events might not be as frequent as with concert going.

Table 5-21, CBD Restaurant Frequency as Part of ATTENDING A THEME EVENT

Restaurant Frequency	Number of Respondents Who Attended a THEME EVENT During the Last Year	[%]
EVERY VISIT	26	[14%]
MORE THAN 50%	17	[9%]
LESS THAN 50%	20	[11%]
NEVER	122	[66%]
Valid Cases	185	[100%]

Our actual question was whether, or to what degree, attenders ate meals at CBD or Station Square restaurants. As indicated in Table 5-21, almost a quarter reported eating that meal in the CBD or Station Square on "more than half" of their visits or on "every" visit.

5.2.4 CIVIC EVENTS

The final tested event consisted of Civic events for which no admissions fee is charged such as the 3 Rivers Arts Festival, the Regatta, the Fourth of July Fireworks, St. Patrick's Day Parade, etc.

Almost half [46%] of all respondents report attending this type of event in the CBD during the last year. While 45% of the female respondents report attending, 48% of males report attending.

5.2.4.1 Characteristics of Participants

The household income of respondents is a significant factor in explaining their attendance at events like these. However, its significance is that relatively high proportions of respondents from households with incomes between $15,000 and $60,000 attend while only 28% of those with lower incomes attend and 47% of those with higher incomes attend. This is, at least relative to the other three types of events that we tested, a "middle class" event; over three quarters of those attending are from households whose incomes are between $15,000 and $60,000.

Table 5-22, Household Income of ATTENDERS OF CIVIC EVENTS

Household Income	Number of Respondents	[%]	Percentage of Income Group
Under $15,000	36	13%	[28%]
$15 - $30,000	120	41%	[50%]
$30 - $60,000	105	37%	[52%]
Over $60,000	25	9%	[47%]
Valid Cases	286	100%	

Table 5-23, Age of Attenders Going to CIVIC EVENTS

Age Group	Number of Respondents	[%]	Percentage of Age Group
15 - 19	44	14%	[68%]
20 - 29	74	24%	[59%]
30 - 45	102	33%	[48%]
46 - 65	67	22%	[40%]
Over 65	21	7%	[23%]
Valid Cases	308	100%	

Age is also a significant factor. The younger the respondent, the more likely the attendance at this sort of event. This finding is best illustrated by the fact that 68% of the teenagers report attending, while 23% of the seniors report attending civic events.

A significantly high proportion of people who report attending these types of events are also people that were classified as CBD Shoppers: 56% of the CBD Shoppers report attending this type of event; 27% of Non CBD Shoppers report attending this type of event. Over eighty percent of the attenders are also "CBD Shoppers".

5.2.4.2 Frequency of Participation

Table 5-24, Frequency of Attendance During the Last Year, CIVIC EVENTS

CIVIC EVENTS	Number of All Respondents	[Percentage]
NOT LAST YEAR	360	[54%]
ONCE OR TWICE	245	[36%]
3 TO 6 TIMES	53	[8%]
6+ TIMES	11	[2%]
Valid Cases	669	[100%]

As indicated in Table 5-24, over a third of all respondents reported attending at least one or two Civic Events in the CBD during the last year.

5.2.4.3 Related Shopping or Dining Activities

Table 5-25, Shopping Frequency as Part of ATTENDING A CIVIC EVENT

Shopping Frequency	Number of Respondents Who Attended a CIVIC EVENT During the Last Year	[%]
EVERY VISIT	40	[13%]
MORE THAN 50%	13	[4%]
LESS THAN 50%	30	[10%]
NEVER	225	[73%]
Valid Cases	308	[100%]

As indicated in Table 5-25, there is some connection between attending Civic Events and shopping in the CBD; just under a fifth of the attenders report shopping more than half the time they participate in one of these events.

This is a higher proportion than we found among attenders at any of the four tested types of events.

We anticipated that eating meals before, during or after participating in Civic Events would be relatively frequent. We were not, however, sure about attenders' restaurant usage. The actual question, that we posed, was whether, or to what degree, attenders ate meals at the CBD or Station Square restaurants.

Table 5-26, CBD Restaurant Frequency as Part of ATTENDING A CIVIC EVENT

Restaurant Frequency	Number of Respondents Who Attended a CIVIC EVENT During the Last Year	[%]
EVERY VISIT	69	[22%]
MORE THAN 50%	26	[8%]
LESS THAN 50%	60	[20%]
NEVER	153	[50%]
Valid Cases	308	[100%]

As indicated in Table 5-26, almost a third [30%] reported eating that meal in the CBD or Station Square on "more than half" of their visits or on "every" visit. This proportion was the highest of any group of special event attenders that we tested.

5.3 SUMMARY: Other Aspects of Retail Revitalization

Eating dinners or attending special events in Downtown Pittsburgh are ways in which Allegheny County residents become acquainted with or enjoy downtown Pittsburgh. This survey documented the fact that significantly high proportions of these people have used CBD restaurants and participated in special events conducted in or around the CBD.

> Essentially all (90%) respondents reported going out for dinner in the last month; 46% of these restaurant go-ers reported that they had eaten at a CBD restaurant during the last year.

This finding has important significance for CBD restaurant development since it indicates that over 40% of the survey respondents have eaten a dinner at a CBD restaurant in the last year. The household income levels of CBD restaurant go-ers were relatively higher than the levels of those who did not eat at a CBD restaurant.

The finding is also an important factor to appreciate in conceiving a downtown development strategy; 84% of the CBD restaurant go-ers were also CBD Shoppers, people who had shopped in the CBD during the last five years. Indeed, 57% of all CBD Shoppers reported eating a dinner at a CBD restaurant during the last year. There is a connection between CBD shopping and eating dinners at CBD restaurants. This connection reinforces the general finding that half of all respondents view shopping as a form of entertainment; not just an act of procuring goods!

The other potential connection that was explored concerned attendance at special events that were held in the CBD. This attendance was relatively high among survey respondents.

About half of the survey respondents reported attending at least one concert, at least one sports event, or at least one civic event in the CBD last year. The attendees' income levels and use of CBD restaurants and stores, however, varied depending on the nature of the event.

While only 28% of the respondents reported attending a "Theme" event, their household incomes and ages are of interest. Relatively young people from generally affluent households who had familiarity with CBD Shopping were the primary attenders theme events in the CBD. Relatively few of these people did CBD Shopping as a part of their participation in a theme event. However, between a third and a half of these attenders ate a meal at a CBD or Station Square restaurant as part of their participation. These people are a market segment that may be tapped.

"Civic Events" attracted a higher proportion of Allegheny County respondents than "theme events": 46% reported attending one of these civic events in the last year. These people were not primarily city of Pittsburgh residents; like the overall distribution of population, about three quarters of the attenders resided outside the City.

The Civic Event attenders were more "middle class" in terms of their household incomes in comparison to those who attended the theme events. Relatively high proportions of these people used CBD stores [27%] for shopping and CBD restaurants [50%] for dining while participating in the Civic Events. These people are making an economic impact on these CBD businesses.

"Concerts" in the CBD were the special events mentioned most frequently by respondents; 53% reported attendance at a concert in the last year. About 5% reported "subscribing" to at least one concert or theater series. Significantly higher proportions of people from high income households reported higher rates of attendance at concert events. So did young people. About 13% of the attendees reported shopping as a part of the concert going experience; 44% reported eating a meal at a CBD restaurant as part of the experience.

"Sports Events" at the Civic Arena and Three Rivers Stadium were attended by 49% of the respondents during the last year. About 6% of the respondents reported being season ticket holders at one or more of these sports events. Higher proportions of younger respondents from more affluent households reported attending these events. Less than 10% of the attendees reported shopping as a part of the sports spectating experience; 37% reported eating a meal at a CBD restaurant as part of the experience.

Over a third of the "Non CBD Shoppers", people who report not shopping in the CBD in the last five years or ever, report attending special events in the CBD like the concerts or sports contests.

The connections between attendance at special events that are held in proximity to the CBD and the use of CBD shops are not as strong as the connections between shopping and eating dinner at CBD restaurants. However, many people who do not shop in the CBD attend these special events; if their experiences with the CBD as special events attenders could be translated into shopping experiences -- on other occasions -- their shopping would be a complement to revitalization initiatives, such as those tested in this survey, and could have a positive effect on CBD shopping and restaurant use -- the key elements of the CBD's retail structure.

ENDNOTES

1. Appendix A contains a summary of the field work procedures that have been employed as well as a discussion about the representativeness of the sample and a copy of the questionnaire.

2. On "yes" or "no" responses we should be confident to say that 95% of the time the proportion of respondents' answers will be within ± 5% of the reported proportions. For example, if "yes" is 48% and "no" is 52%, there is no basis for saying these responses are different since they are within ±5% of each other. Appendix A elaborates on this and related aspects of this sample's representativeness.

3. Appendix A contains a discussion of this sample's gender distribution. In completing the analysis that is presented in this paper, gender distributions have been tested for each key finding. If gender is identified as a statistically significant factor, it is mentioned in the text. If gender is not mentioned, it is not a significant factor -- men and women, regardless of their proportion of the sample, have not answered the question in a significantly different ways and, therefore, do not warrant special consideration.

4. One shortcoming of telephone interviewing of the type done for this survey is that slightly more interviews are completed with large "families" than with small "families". The reason is simple. There is a higher probability that someone in a larger family will be available to answer and to complete an interview than in a small, particularly a single person, household. To reduce the occurrence of this shortcoming at least six calls are made to each household before it is declared "ineligible -- no answer". Appendix A contains further information about this matter.

Throughout this analysis the family size distribution, like gender [as mentioned in the prior endnote], is analyzed. If it is a statistically significant factor, it is mentioned.

5. As noted about gender and household size in the two prior endnotes, this variable [household income] is analyzed throughout the report and mentioned in those cases where it is of statistical significance.

6. Students are also treated as employed persons with respect to "work place location". They, like employed persons, were invited to identify the municipality and ZIPCode of the place to which they travel daily; in their case it was their school.

7. While it is not the intent of this study to explore comprehensively the important questions of the CBD's role in the region [other than its role as a major retail center], it would be useful to know how employment in the CBD has changed relative to employment elsewhere in the City and outside the City during the past twenty to thirty years. As we have reviewed the findings about current CBD employment we have attempted to find a reliable estimate of <u>work place</u> employment in the CBD and in the City outside of the CBD. We have been unable to find such a source of data. It would be useful to monitor the employment by work place in the City on a regular basis.

8. Interviewers were provided with several specific instructions about their use of examples. First, shopping in the Northside, Southside, or Strip District was not to be considered as CBD shopping. As noted in the script, Station Square was considered part of the CBD. Second, if interviewers were asked to define the types of stores to which they were referring, the following examples were to be used:

> Traditional Department Stores: Kaufmann's, Hornes, J.C. Penny's, and Sears.
>
> Discount Department Stores: K-Mart or Hills.
>
> Specialty Stores: Gordon's and PicWay for shoes; The Limited for women's clothing; Richman Brothers for men's clothing; The Appliance Store for home entertainment equipment; and Wickes for furniture.

Interviewers were instructed not to limit responses to the specific stores that are listed above.

9. It is very important to emphasis that this survey research approach to gaining insights about relatively general merchandise lines is not viewed as a substitute for the traditional measures that are used by retailers. These measures are essentially based on sales of very specific merchandise lines in specific types of stores or departments of Full Line Department Stores.

10. This principle appears to hold in the Pittsburgh CBD's Department Stores. As reported in the following section of this report, CBD Shoppers, when asked to compare CBD Department Stores with their branches in the malls, reported that they were at least the same and, in most cases, better in the CBD.

11. There are two points about this finding. First, what people said: 85% said they owned or had a private motor vehicle available on a regular basis <u>for these kinds of shopping trips</u>. Of those respondents who did not have a vehicle available a majority said they were usually automobile passengers. These people constituted almost 8% of all respondents. Just over 5% of the respondents said they used some form of public transit. Other modes were mentioned by just under 2% of the respondents.

The second point is that people were asked about their mode of travel for shopping trips "like these" referring to the merchandise lines. People were not asked about the mode of transportation that they used, for example, to go to work in the CBD where they also may have done shopping.

12. In those sections of this report that deal with assessments of CBD shopping and potential improvements this factor was analyzed. The objective was to see if statistically significant proportions of "utilitarian" or "entertainment" shoppers favored certain CBD characteristics or potential improvements. There were no statistically significant findings.

13. There was no effort to measure the frequency of respondents' shopping or shopping visits in the CBD. The use of the "how recently" measurement was explicitly designed to take respondents' familiarity with CBD shopping into account. Knowing respondents' familiarity with CBD shopping, it was anticipated, would add strength to findings about shoppers opinions and ratings of the CBD as a place to shop. "Frequency of CBD shopping" or the magnitude of certain types of CBD buying are measurements that should be made in a subsequent survey.

14. This different treatment was necessitated by the practical finding that a Non CBD Shopper would be unable, and -- as we discovered in the pretest -- unwilling, to comment on the CBD or to compare it to some place else.

It is also important to realize that CBD and Non CBD Shoppers are distinctly different targets for retail marketing efforts. Accordingly, throughout the rest of this report, we distinguish between CBD and Non CBD Shoppers' behavior, assessments, and opinions about shopping and the CBD.

In addition these factors are analyzed with particular attention to the currency of the respondent's CBD shopping. A statistical analysis is done that determines if CBD Shoppers who have been in the CBD in the "last month" have different behaviors, assessments, or opinions than CBD Shoppers whose most recent visit is in "the last year" or "the last 5 years". When statistically significant differences are discovered, they are mentioned in the text.

15. This finding is based on an analysis of a special CBD Worker quota sample of 198 respondents. The following table, however, is based on the sample of the general population so there are some minor differences with this statement.

16. There are, of course, other measures that can and should be used to assess the importance of the CBD Worker to CBD shopping. First, there is the "tale of the tape" -- how much do CBD Workers spend on merchandise like we tested in CBD stores? This would be the key information; it should be compared to spending of non CBD Workers in CBD stores.

Another, but related, measure would be to determine how much of CBD Workers' disposable income is spent in CBD stores; this should be compared with comparable information about other shoppers.

17. These findings are also based on the analysis of the specially selected quota sample of 198 CBD Workers.

18. It should be noted that significantly high proportions of young respondents [i.e., teenagers and students] report agreement with this premise. They are, as noted earlier, an important component of the CBD Shoppers' group.

19. Earlier in this report the differences between "CBD Shoppers" and "Non CBD Shoppers" were discussed. CBD Shoppers were younger. The following finding is about CBD Shoppers only. It deals, therefore, with a young segment of an already acknowledged young segment of Allegheny County shoppers. Here is the finding:

> Approximately a third of CBD Shoppers are under 30 years old and another third are over 45 years old. 43% of the CBD Shoppers under 30 years old reported an"improved" CBD; 53% of the CBD Shoppers over 45 years old reported that the CBD had "declined" in the last five years. As noted elsewhere, "student" and "retired" respondents indicated a similar relationship.

There were, however, no statistically significant relationships between this variable and household income, marital status, gender, residential location [in or out of the City], or work place location [in or out of the City].

20. The same point mentioned in the prior Endnote applies here:

> Approximately a third of CBD Shoppers are under 30 years old and 35% are over 45 years old.
>
> > 55% of the CBD Shoppers under 30 years old reported shopping "more";
> >
> > 45% of the CBD Shoppers over 45 years old

reported shopping "less" in the CBD than they did five years ago.

As noted elsewhere, "student" and "retired" respondents indicated a similar relationship.

There were, however, no statistically significant relationships between this variable and household income, marital status, gender, residential location [in or out of the City], or work place location [in or out of the City].

21. It should be noted that respondents were asked these questions BEFORE they were asked to compare the CBD with the malls. This survey detail is important from a research methods perspective since it demonstrates that respondents were not "lead" to particular types of answers that were, or could have been, suggested through the comparison questions.

22. There were 445 respondents who were classified as CBD Shoppers. Of these 41 gave no "best aspect" and 40 said there was no "best aspect" to shopping in the CBD. The "best aspects" mentioned by the remaining 364 respondents are summarized in the text.

Of the 445 respondents, 389 gave "worst aspects" responses. Of the remaining 56, 33 gave no responses and 23 said there was no "worst aspect" to shopping in the CBD. The "worst aspects" mentioned by the 389 respondents are summarized in the text.

23. We have grouped responses into categories that relate to what people told us. As you might appreciate, people have their own special vocabulary; so do our interviewers. When ever the coding staff encountered a difficult to interpret response, the Principal Investigator or survey manager was consulted. There are less than 3 dozen out of 1,039 "best" and "worst" responses that could not be classified.

24. In those cases where a particular Major Retail Center [Mall] appears to have some distinguishing difference in the trait being compared, it will be mentioned. If a mall is not mentioned, it means that these respondents' comparisons of the CBD were essentially the same for all malls.

25. Throughout this section and the following section about potential CBD improvements the discussions of the findings are based on an analysis of shoppers' characteristics such as age, household income, etc... In addition the currency of CBD Shopping experience has been analyzed to determine if the views of CBD Shoppers who have been in the CBD "last month" differ from those who have been there in "the last year" or "the last five years". When there are statistically significant variations in either of these variables, they are mentioned in the text.

26. Another, but related, factor was Marital Status. Single people, high proportions of whom tend to be teenagers and senior citizens, report that parking was not a problem; married respondents reported that parking was a problem.

27. 301 out of the 381 CBD Shoppers who answered this question said, "No, nothing!"

In two dozen cases respondents mentioned transportation improvements that would either improve public transit [12 respondents], improve roads leading into the CBD [6 respondents], or relieve traffic congestion [6 respondents].

Likewise, eighty percent of the Non CBD Shopper respondents [160 out of 203 who answered this question] said, "No, nothing!"

In fifteen cases respondents mentioned transportation improvements that would either improve public transit [3 respondents], improve roads leading into the CBD [9 respondents], or relieve traffic congestion [3 respondents].

No other improvement or type of improvement was mentioned by a meaningful number of respondents.

28. This finding is a general one. It does not associate the per meal cost with particular restaurants or restaurants in particular places such as the CBD. It simply reports that people who reported dining at a CBD restaurant in the last year generally pay more when they dine anywhere than people who reported NOT dining at a CBD restaurant in the last year.

(Continued on the Next Page)

29. The following table contains a listing of the remaining restaurants that were named.

Downtown Restaurants
Mentioned by less than 5%
of the "downtown restaurant go-ers"

Restaurants:	Number of Respondenses
LEMONT	9
GEORGETOWN INN	9
CHEESE CELLAR [SSQ]	6
FROGGYS	6
TEQUILA JUNCTION [SSQ]	6
CHRISTOPHERS	5
ARTHURS	5
PICCOLO PICCOLO	5
REFLECTIONS	5
DINGBATS	4
HUGOS ROTISSERIE	4
1902 LANDMARK TAVERN	4
RUTH CHRIS STEAK HOUSE	4
RUDDY DUCK	4
McDONALDS/WENDYS	3
CHAUNCYS [SSQ]	3
TRAMPS	3
NOODLES [SSQ]	3
THE TERRACE ROOM	2
GATEWAY CLIPPER	2

In addition each of the following restaurants was mentioned by one respondent: THE HILTON, BRITISH BICYCLE CLUB, DYNASTY [SSQ], STERLINGS, SUZIES GREEK SPECIAL, OYSTER HOUSE, and the CHINATOWN INN.

30. Of course this survey's findings about Special Events are not substitutes for other surveys that have and will continue to be undertaken by sponsors of special events, the performing arts, or the professional sports teams.

Most of these surveys intercept a person who is known to be attending a particular type of event at the moment or on a regular basis [i.e., the season ticket holder or the subscriber]. These surveys, regardless of the specific methods of contact that they use, attempt to get very specific information about the respondents' behavior at these events, motivation for attending these events, and attitudes about the experience.

We could not, and have not attempted, to replicate these very specific "user" surveys. The contribution of our survey is that it measures some attributes of "non users" or compares "users" with "non users" in Allegheny County.

APPENDIX A: Fieldwork Summary and Questionnaire

Contents

The questionnaire used to conduct these interviews is included at the end of this Appendix. It was developed by the Principal Investigator and UCSUR Staff in close consultation with W. Paul Farmer, Steven Branca, and John Burke of the City of Pittsburgh's Department of City Planning.

A number of the questions used in this survey had been field tested in the 1987 Consumer Surveys of Pittsburgh Neighborhoods; accordingly, only a brief pretest was warranted. Once pre-test modifications were made the entire sample was drawn and the questionnaire administered. Quota samples of teenagers and CBD workers were also sought. Some concern has arisen about the apparently high proportion of female respondents; a comment about this matter is included in this Appendix.

FIELDWORK SUMMARY

Pre-Test

A pre-test of the Central Business District Survey was administered to ten residents (N=10) in Allegheny County on November 2, 1988. The average time to conduct each interview was 20 minutes.

Based on the pre-test several revisions were made in the questionnaire. The key changes were: to skip the opinion questions (Q. 19-22) and comparison questions (Q. 23-32) for those respondents who had not been to Pittsburgh in over five years (or have never been there.)

General Population

Fieldwork for this portion of the study started on November 18, 1988 and was completed by December 12, 1988.

The interviewers worked for a total of 331 hours to complete 669 interviews.

The general sampling plan called for the distribution of approximately 900 completed interviews across three populations of interest:

1) a sample representing all adults in Allegheny County (about 700);

2) a special quota sample of an extra 100 CBD workers and;

3) a special quota sample of an extra 100 teenagers.

The telephone numbers for all three populations were drawn from UCSUR's Random Digit Daily Telephone Sampling Frame for Allegheny County. In the case of the general population sample, random household member selection was attempted using the "last birthday" selection method.

Coupling these two sample selection stages together, the resultant respondents are thought to represent the adult population of Allegheny County with an associated error factor of ± 4.5% for a given question with a 95% confidence level.

A summary of the disposition of all sampling points for the General Population component is presented below:

Outcome	N
Completion	669
Refusal	363
	N
Non-Working	495
Non-Residential	259
Ineligible Location	98
No Answer/Busy (after 6 tries)	217
Total Sample	N = 2100

Response Rate (completed interviews/
total eligible households) = 65%

Quota Selection [for teenagers and CBD workers]

Fieldwork using the quota selection started on December 12, 1988 and was completed by January 8, 1989. Household member selection was attempted by asking for a CBD worker or a teenager to respond to this survey. Using this selection process, an additional 78 teenagers and 146 CBD workers were interviewed.

These 224 interviews required a total of 260.5 hours to complete.

A summary of the distribution of the teenager and CBD worker component is presented below:

Outcome	N
Completions	224
Refusals*	217
	N
Ineligible Household (no quota member available)	1544
Non-Working	817
Non-Residential	461
Ineligible Location	195
No Answer/Busy	816
Ineligible Respondent (Child or baby sitter answered phone)	16
Total sample	N = 4190

Response Rate = 51%

---

* **Interviewers reported that people who answered the phone often thought that the interviewers, who were instructed to ask for a "teenager" or "downtown worker", were selling something; this could account for the high refusal rate.**

INTERPRETATION OF SURVEY RESULTS: GENDER DISTRIBUTION

Benchmark statistics lead us to believe that when we use a random selection procedure to select an adult member of a household in the interview process, the natural ratio of female to male respondents will be approximately 55:45.

These statistics are derived from 1980 Census data for the Pittsburgh SMSA*. Given the demographic changes in our region, it is reasonable to assume that this ratio is even more skewed towards females**.

Assuming this ratio to be correct, and comparing it to our observed ratio of approximately 66:34 in this survey, how do we account for this difference and what is its implication for this analysis?

The survey process, no matter how carefully applied, allows the possibility for error along this and other demographic dimensions. Our household member selection process was driven by a method described as the "Next or Last Birthday Method of Respondent Selection."

> This method, which is relatively new but widely accepted and used in the industry, intends to draw upon a simple, well-understood and theoretically random event that occurs in every household: that is, which adult (or individual) is having the next birthday or alternatively has had the most recent birthday. If applied and responded to faithfully, this method, within sampling error limits, should produce a random and therefore representative profile of a given demographic characteristic within our population.

*** Table 208,"Families, SubFamilies, Unrelated Individuals and UnMarried Couples by Marital Status, Sex and Race"; Detailed Population Characteristics, Census of the Population, Bureau of the Census; 1980.**

**** In the 1980 Census 83% of the households were occupied by married people. 13.5% of the remaining households were headed by females and the remaining 3.5% were headed by males. There may have been changes since 1980 such as a lower percentage of households that are occupied by married people. There may even be a higher proportion of females in the "non married" households.**

If household selection is also random, or nearly random, the intersection of these two selection stages should produce a representative sample of the population at large within certain error limits.

If this is the case, why do we find such resultant sex ratios as we have in this survey?

There are several practical phenomenon that account for some of this error. We know, for example, that females are more likely to answer the phone than males. This is simply a matter of opportunity (they are home more hours per day than the male), a matter of habit, a matter of protection for the male from outside annoyances, etc.

This trend also varies by social class, and is most prominent in lower Socio Economic Status families. It is also the case that in male-only or female-only households, the survey process will capture a higher percentage of the female-only household than the male-only household.

Finally, and although there is no existing hard data to support this, we believe that the female will be more likely to falsely respond (identify herself as the person to be interviewed) to the birthday question for reasons such as those mentioned above or just out of general interest in being interviewed on this subject.

These reasons aside, we still face the problem of the effect of this bias on our data. Subject matter of the interview is the first thing that we would consider in evaluating this bias. In this case, we are generally talking about attitudes and behaviors in regards to shopping.

Tradition tells us that males and females will differ in their behaviors and attitudes toward shopping. Therefore, our methodological bias may potentially be of concern on some matters.

Steven Manners
Assistant Director
University Center for Social and Urban Research

CBD QUESTIONNAIRE

University Center for Social and Urban Research
City of Pittsburgh Department of City Planning
Central Business District Shopping Survey
November, 1988

CASEID: ________

INT ID: ________

Hello, My name is ______________________________, and I am calling from the University of Pittsburgh. We are conducting a survey about how shoppers use major retail and entertainment places like shopping malls and downtown Pittsburgh.

First, could you tell me if I have reached a private residence that is in Allegheny County?

(IN: IF NOT A PRIVATE RESIDENCE IN ALLEGHENY COUNTY, POLITELY TERMINATE INTERVIEW)

Your household has been randomly selected as part of a representative sample of people who live in this community. For the purpose of this interview, I would like to speak to a member of your household -- someone 14 years of age or older -- who has most recently had a birthday. Who would that be? May I speak with that person?

(IN: IF NOT AVAILABLE, GET FIRST NAME AND SCHEDULE CALLBACK)

(IN: WHEN APPROPRIATE RESPONDENT IS SELECTED: REREAD UNDERLINED TEXT IF NECESSARY)

This interview will take only a few minutes of your time and all of your responses will be kept completely confidential.

(IF ASKED: THIS INFORMATION WILL BE USED TO ADVISE MERCHANTS, REAL ESTATE DEVELOPERS, AND PUBLIC OFFICIALS - LIKE THE MAYOR AND MEMBERS OF CITY COUNCIL - ABOUT HOW TO MAKE SHOPPING AND ENTERTAINMENT OPPORTUNITIES BETTER FOR THOSE OF US THAT LIVE IN THE METROPOLITAN PITTSBURGH AREA)

Now, I would like to begin:

1. How old will you be on your next birthday?

_____________ Respondent's Age [at next birthday]

2. How many years have you been a resident of the Pittsburgh Metropolitan Area?

_________ Number of Years

3. What municipality do you live in?

____
Name of Municipality

IF CITY OF PITTSBURGH,ASK: What neighborhood?

____
Name of Pittsburgh Neighborhood

4. What is your ZIP CODE? _____________ ZIP CODE

5. How many people, including yourself, live in your household?

_____________ Number of People

6. **[IN: DETERMINE GENDER & STATUS OF RESPONDENT AND CODE:]**

___ (1) MALE ADULT ___ (2) MALE TEENAGER

[Teenagers are 13-18 years old]

___ (3) FEMALE ADULT ___ (4) FEMALE TEENAGER

7. Are you employed?

___ (1) YES 7a. Where is your work place located? [Name the municipality; if Pittsburgh, ask for neighborhood]:

____

Municipality or Neighborhood ZIP CODE

[IN: GO TO Item #8]

_____ (2) NO 7b. Are you:

.... a full time student?

_____ (1) Yes - **[IF NO: CONTINUE]**

7c. Are you in:

_____ (1) High School **[Go To Q# 8]**

_____ (2) Technical School **[Go To Q# 7d]**

_____ (3) College **[Go To Q# 7d]**

7d. Where is your school located?

____

(municipality/neighborhood/zip code)

[Go To Q# 8]

.... retired?

_____ (2) Yes **(IF NO: CONTINUE)**

.... unemployed (and seeking a job)?

_____ (3) Yes **(IF NO: CONTINUE)**

.... a housewife or househusband?

_____ (4) Yes **IF NO: check (5)**

_____ (5) "None of the Above"

8. [IN: DON'T READ]
[DOES THE RESPONDENT WORK OR STUDY IN DOWNTOWN PITTSBURGH?]

_____(1) YES _____(2) NO

9. Now, I am going to ask you about merchandise that people shop for regularly. I would like you to first tell me whether <u>you</u> have bought this type of merchandise during the last year; then if you have ; how often do you shop for this item; whether you shop for this at a traditional dept. store, a discount dept. store or a specialty shop; and finally if you ever shop for this in Downtown or Station Square:

(IN: One at a time - left to right; see coding categories below; Northside, Southside, and The Strip are not in Downtown Pittsburgh)

	MERCHANDISE LINES:	Bought in Last Yr. (Q9)	Freq. (Q9a.)	Type of Store (Q10)	Downtown? (Q11)
a.	MENS "DRESS" CLOTHES	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
b.	MENS CASUAL CLOTHES	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
c.	WOMENS "DRESS"CLOTHES	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
d.	WOMENS CASUAL CLOTHES	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
e.	SHOES FOR MEN	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
f.	SHOES FOR WOMEN	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
g.	JEWELRY	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
h.	HOUSEWARES	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
i.	FURNITURE	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/
j.	HOME ENTERTAINMENT EQUIPMENT	(1)N (2)Y/	1 2 3 /	1 2 3 NA/	1 2 3 NA/

Q9a. FREQUENCY
- [1] Often; at least once per month
- [2] Occasionally; anything in between
- [3] Rarely; twice a year or less

Q11. DOWNTOWN
- [1] No
- [2] Yes, CBD
- [3] Yes, Station Square

Q10. TYPE
- [1] Trad. Dept store: Kaufmanns, Hornes, J.C. Penny, Sears
- [2] Discount Dept. Store: K-Mart, Hills
- [3] Specialty Store: Littles, Gordons, PicWay for shoes; The Limited for Womens apparel, Richmond Brothers for Men's apparel, the Appliance Store for electronics, Wickes for furniture, etc.

12. When do you <u>usually</u> shop for <u>THESE TYPES OF ITEMS</u> [ie. the items that you have bought]; is it on a week day or weekend or both?

____[1] during the week ______[2] on the week end

______[3] both

13. When do you <u>usually</u> shop for <u>THESE TYPES OF ITEMS</u>; is it during the day or in the evening or both?

_____[1] during the day ______[2] in the evening

_____ [3] both

14. Is there a motor vehicle owned by or available to you on a regular basis <u>for the kinds of shopping that we have discussed?</u>

_____[1] YES _____[2] NO [**IN: ASK Q# 14a.**]

14a. What mode of transportation do you typically use to make these types of shopping trips?

_____ [1] Bus

_____ [2] Rapid Transit such as The "T" or commuter train

_____ [3] Auto Passenger

_____ [4] Other [**IN: PLEASE NOTE**]________________________

15. Have you been to any of the following Major Retail Centers in the last five years?; and if so approximately how long does it take you to get to THAT Major Retail Center? [when you usually do this type of shopping]

MAJOR RETAIL CENTER	BEEN THERE? (Q15)		TRAVEL TIME IN MINUTES: (Q16)
A. BEAVER VALLEY MALL	[1] N	[2] Y---->	________
B. CENTURY III MALL	[1] N	[2] Y---->	________
C. DOWNTOWN PITTSBURGH [incl Station Square]	[1] N	[2] Y---->	________
D. MONROEVILLE MALL	[1] N	[2] Y---->	________
E. ROSS PARK MALL	[1] N	[2] Y---->	________
F. SOUTH HILLS VILLAGE	[1] N	[2] Y---->	________
G. WESTMORELAND MALL	[1] N	[2] Y---->	________

17. Which of these major retail centers have you shopped at most frequently during the past year?

[IN: ENTER LETTER CODE: ________]

17a. Second most frequently?

[IN: ENTER LETTER CODE: ________]

18. When was the last time you shopped for clothing, shoes, jewelry, or things for the home in Downtown Pittsburgh?

[1]___ Within the Last Month or so [October, 1988]
[2]___ Within the Last Year [November, 1987]
[3]___ Within the Last Three Years
[4]___ Within the Last 5 Years [since 1983]

[IN: IF ANY OF THE ABOVE; Go To Q# 19]

[5]___ Over 5 Years Ago
[6]___ NEVER!

[IN: IF EITHER "5" or "6" ; ASK Q# 18a.]

18a. Why haven't you shopped in Downtown Pittsburgh [in the last five years]?

[IN: PROBE UNTIL YOU GET AT LEAST TWO <u>REAL</u> REASONS!]

____

____

____

[Go To Q# 33]

[IN: READ -- NOW THAT WE'VE TALKED ABOUT WHAT YOU BUY AND WHERE YOU BUY IT, I'D LIKE YOUR OPINIONS ABOUT SHOPPING IN DOWNTOWN PITTSBURGH. For purposes of your answers to the following questions, please consider "DOWNTOWN PITTSBURGH" to include Station Square.]

19. Within the last FIVE years, would you say that DOWNTOWN PITTSBURGH'S shopping district has generally improved or generally declined?

_____ 1) Improved
_____ 2) Declined
_____ 3) Stayed the same
_____ 7) Don't Know
_____ 9) No Answer

20. Would you say that during the past year, you're buying more, less, or about the same in DOWNTOWN PITTSBURGH as you did five years ago? **[IN: IF RESPONDENT WAS NOT IN METRO AREA 5 YEARS AGO, CHECK THE APPROPRIATE SPACE.]**

_____ 1) More
_____ 2) Same
_____ 3) Less

_____ 4) Respondent was not in Metro area five years ago.

21. What is the best aspect of shopping in the Downtown Pittsburgh?

____

____

____

22. What is the worst aspect of shopping in the Downtown Pittsburgh?

____

____

____

[READ: ON THE BASIS OF YOUR EXPERIENCES PLEASE TELL ME HOW SHOPPING IN DOWNTOWN PITTSBURGH [including Station Square] COMPARES WITH SHOPPING IN ___[Q# 17]__ SHOPPING MALL.]

23. In general would you say that shopping in downtown Pittsburgh is much better, better, worse, or much worse than shopping at ________________?

[1]____	Much Better	[5]____	Much Worse
[2]____	Better	[6]____	No Opinion
[3]____	About the Same	[7]____	Can't Compare
[4]____	Worse	[9]____	No Answer

[IN: EVERYONE WILL HAVE AN OPINION; GET IT -- EVEN IF IT IS "about the same"!]

24. Now I would like to know how you rate the overall prices, quality, and variety of the goods and services found in the Downtown Pittsburgh's stores compared to ____________________?

[1]____	Much Better	[5]____	Much Worse
[2]____	Better	[6]____	No Opinion
[3]____	About the Same	[7]____	Can't Compare
[4]____	Worse	[9]____	No Answer

25. How would you rate the merchandise at the specialty shops in Fifth Avenue Place, OXFORD Center, & PPG Place compared to ____________________?

[1]____	Much Better	[5]____	Much Worse
[2]____	Better	[6]____	No Opinion
[3]____	About the Same	[7]____	Can't Compare
[4]____	Worse	[9]____	No Answer

26. How would you rate the merchandise at the Downtown Pittsburgh stores of Kaufmann's and Horne's compared to their stores in ____________________?

[1]____	Much Better	[5]____	Much Worse
[2]____	Better	[6]____	No Opinion
[3]____	About the Same	[7]____	Can't Compare
[4]____	Worse	[9]____	No Answer

27. And how about service?

Would you rate the service in Downtown Pittsburgh's SPECIALTY and DEPARTMENT stores as "worse", "better", or "about the same" as the service found in:

27a. Specialty Stores in ________________?

[1]____	Much Better	[5]____	Much Worse
[2]____	Better	[6]____	No Opinion
[3]____	About the Same	[7]____	Can't Compare
[4]____	Worse	[9]____	No Answer

27b. Department Stores [both Kaufmann's & Horne's] in ______________?

[1]____	Much Better	[5]____	Much Worse
[2]____	Better	[6]____	No Opinion
[3]____	About the Same	[7]____	Can't Compare
[4]____	Worse	[9]____	No Answer

28. How would you rate the convenience of getting INTO Downtown Pittsburgh to shop in comparison to ____________________?

1]____Much Less Convenient;
2]____Somewhat Less Convenient;
3]____Somewhat More Convenient;
4]____Much More Convenient;
7]____Don't Know

29. Is parking in Downtown Pittsburgh a problem for you?

1]____ NO 2]____ YES ----> Ask Why?

29a.____

____

30. How would you rate the convenience of shopping IN Downtown Pittsburgh [getting from place to place within the downtown area] compared with shopping in ____________________________?

1]____Much Less Convenient;
2]____Somewhat Less Convenient;
3]____Somewhat More Convenient;
4]____Much More Convenient;
7]____Don't Know

31. How would you rate the general image and appearance of Downtown Pittsburgh compared with ____________________?

[1]____	Much Better	[5]____	Much Worse
[2]____	Better	[6]____	No Opinion
[3]____	About the Same	[7]____	Can't Compare
[4]____	Worse	[9]____	No Answer

32. How would you rate the safety and security of Downtown Pittsburgh compared with ______________________________?

1]____Much Less Safe; -----> Why? (Q29a.)
2]____Somewhat Less Safe;
3]____Somewhat Safer;
4]____Much More Safe; -----> Why? (Q29a.)
7]____Don't Know

32a.____

____

33. Now I'm going to read a list of possible improvements that might be made to PITTSBURGH'S DOWNTOWN shopping district. I'd like you to tell me if each of these improvements would make you <u>SHOP</u> in DOWNTOWN PITTSBURGH "a lot more", "a little more", or "about the same" as you do now.

POSSIBLE IMPROVEMENTS	A LOT	A LITTLE	ABOUT THE SAME		
A. BETTER PARKING ARRANGEMENTS: SUCH AS MORE SPACES, EASIER TO FIND GARAGES, CHEAPER RATES FOR SHOPPERS	3	2	1	DK	NA
B. SALES & PROMOTIONS BY ALL THE MAJOR STORES AT THE SAME TIME	3	2	1	DK	NA
C. CLEANER, MORE ATTRACTIVE SIDEWALKS & PUBLIC SPACES	3	2	1	DK	NA
D. MORE VISIBLE SECURITY PATROLS ON DOWNTOWN STREETS	3	2	1	DK	NA
E. A new indoor shopping mall similar to a large suburban shopping mall **WITH A $3.00 PARKING CHARGE FOR A HALF DAY SHOPPING TRIP**	3	2	1	DK	NA
F. A NEW INDOOR SHOPPING MALL SIMILAR TO A LARGE SUBURBAN SHOPPING MALL **WITH FREE PARKING**	3	2	1	DK	NA
G. A NEW REALLY NICE DEPARTMENT STORE LIKE A LARGE "NEW YORK" SAKS FIFTH AVENUE OR A BLOOMINGDALES OR A NEIMAN - MARCUS	3	2	1	DK	NA

34. Of the possible improvements, I just mentioned, which <u>one</u> would be the <u>most important</u> to you in getting you to come to PITTSBURGH'S DOWNTOWN shopping district more often? [**IN: Re-read list if necessary.**]

ENTER CODE LETTER:____________ NONE OF THE ABOVE:________

35. Is there anything that I <u>HAVE NOT MENTIONED</u> that, if done, would make you come to PITTSBURGH'S DOWNTOWN shopping district more often?

____

NOW THAT WE HAVE TALKED ABOUT SHOPPING IN GENERAL AND YOUR USE OF THE PITTSBURGH DOWNTOWN AREA IN PARTICULAR; I WOULD LIKE TO DISCUSS YOUR USE OF RESTAURANTS AND ENTERTAINMENT ACTIVITIES.

36. How many times a month do you usually go out to eat dinner at a "sit down" restaurant?

_____[0] NEVER **[Go To Q# 37]**

_____[1] Once a Month

_____[2] 2 or 3 times a Month

_____[3] At Least Once a Week

_____[4] More Than Once a Week

_____[9] No Response

36a. When you go out to dinner, do the meals usually cost less than $ 5 per person? **[IN: "in general"]**

_____[1] YES (less than $ 5 per meal) **[Go To Q# 36b]**

_____NO ----> ASK: Do the meals costs more than $ 20 per person?

_____[2] NO ($ 5 to $ 20 per meal)

_____[3] YES (more than $ 20 per meal)

36b. During the last year have you gone out to dinner at a restaurant in Downtown Pittsburgh?

_____[1] YES

_____[2] NO **[Go To Q# 37]**

36c. **IF YES; ASK:** Where was that? **[IN: GET THE RESTAURANTS' NAMES]**

_____________________ Restaurant #1

_____________________ Restaurant #2

How many times during the last year did you go to an <u>ENTERTAINMENT EVENT</u> in Downtown Pittsburgh such as:

37. <u>a concert, play or special performance</u> [like the circus or the Ice Capades] at either Heinz Hall, the Benedum, the Civic Arena, or the Three Rivers Stadium.

[0] Not during the Last year [Go To Q# 38]
[1] once or twice
[2] three to six times
[3] more than six times
[4] very frequently, we are subscribers!

While participating in these events, how frequently did you shop in the CBD? ...eat a meal in Downtown Pittsburgh or Station Square restaurant?

		a.SHOP?	b.EAT A MEAL?
[1]	Every visit	______	______
[2]	Most visits [>50%]	______	______
[3]	Sometimes [<50%]	______	______
[0]	Never	______	______

38. <u>a sports event</u> at the Civic Arena [hockey, basketball, arena football, or tennis] or Three Rivers Stadium [Steelers or Pirates].

[0] Not during the Last year [Go To Q# 39]
[1] once or twice
[2] three to six times
[3] more than six times
[4] very frequently, we're season ticket holders!

While participating in these events, how frequently did you shop in the CBD? ...eat a meal in Downtown Pittsburgh or Station Square restaurant?

		a.SHOP?	b.EAT A MEAL?
[1]	Every visit	______	______
[2]	Most visits [>50%]	______	______
[3]	Sometimes [<50%]	______	______
[0]	Never	______	______

39. <u>an event for which an admissions fee was charged</u> such as the Home & Garden Show, the Boat Show, the Car Show, or the Ethnic Food Festival at the Convention Center or the Dog Show at the Civic Arena.

[0] Not during the Last year [Go To Q# 40]
[1] once or twice
[2] three to six times
[3] more than six times

While participating in these events, how frequently did you shop in the CBD? ...eat a meal in Downtown Pittsburgh or Station Square restaurant?

		a.SHOP?	b.EAT A MEAL?
[1]	Every visit	________	________
[2]	Most visits [>50%]	________	________
[3]	Sometimes [<50%]	________	________
[0]	Never	________	________

40. <u>a civic event</u> [for which there is no admissions fee] such as The 3 Rivers Arts Festival, The Regatta, the Forth of July Fireworks, St. Patricks Day Parade, etc..]

[0] Not during the Last year [Go To Q# 41]
[1] once or twice
[2] three to six times
[3] more than six times

While participating in these events, how frequently did you shop in the CBD? ...eat a meal in Downtown Pittsburgh or Station Square restaurant?

		a.SHOP?	b.EAT A MEAL?
[1]	Every visit	________	________
[2]	Most visits [>50%]	________	________
[3]	Sometimes [<50%]	________	________
[0]	Never	________	________

I'd like to finish up this interview by asking a few brief questions about you and your household.

41. Are you single or married?

_____[1] Single _____[2] Married

42. How many people in your household contribute to the household's total yearly income? **[IN: Wages, interest payments, pension, any money coming in . .]**

___________ people

43. Is that household income below $15,000 a year?

_____[1] YES [Below $15,000] **[Go To Q# 44]**

NO ---> ASK: Is that income greater than $30,000?

_____[2] NO [Between $ 15,000 & $ 30,000] **[Go To Q# 44]**

YES ---> ASK: Is that income greater than $ 60,000?

_____[3] NO [Between $ 30,000 & $ 60,000]

_____[4] YES [Over $ 60,000]

_____[9] NO RESPONSE

Well, you've been very cooperative in answering these questions, and to wrap this up, we are very interested in your opinion on one more thing. How do you FEEL about the two following statements? Tell me whether you strongly agree, agree, disagree, or strongly disagree with each of the following statements.

44. Shopping is really a form of entertainment and recreation for me; I don't go shopping just to buy things.

45. When I think about shopping in Downtown Pittsburgh, I think of it as an enjoyable experience. **[IN: TELL RESPONDENTS WHO CLAIM NO KNOWLEDGE OF DOWNTOWN PITTSBURGH THAT WE STILL WANT THEIR OPINIONS.]**

#44	#45
1]	1]____strongly agree
2]	2]____agree
3]	3]____disagree
4]	4]____strongly disagree
5]	5]____no opinion
6]	6]____no response

Thank You for your time.

APPENDIX B: ANALYSIS OF SPECIFIC MERCHANDISE LINES

CONTENTS

MEN'S CLOTHING & SHOES

All respondents were invited to discuss their purchase of three types of men's clothing: "dress", casual, and shoes. As indicated in the following sections, the respondents who bought these three lines of merchandise have some common characteristics.

First, a majority of the respondents who bought men's clothing were women*.

Buyers' Characteristics

Over 70% of all respondents reported buying men's "dress" clothing during the last year. These included 82% of the male and 65% of the female respondents.

Almost three quarters of all respondents reported buying men's "casual" clothing during the last year. These included 86% of the male and 69% of the female respondents.

Less than half of all respondents reported buying men's shoes during the last year. These included 78% of the male and 33% of the female respondents.

The household income of respondents was a significant factor in explaining the proportion of respondents who purchased each of the three merchandise lines during the last year. The higher the household income, the higher the proportion of respondents who bought the item.

---

* This may be directly related to the fact that two thirds of all respondents are women. It may be necessary to undertake some further analysis in which we segment these findings for men and women. Appendix A addresses some other aspects of this matter.

In each of the three merchandise lines the proportions of respondents who were teenagers [under 20 years old] or seniors [over 65 years old], who bought the items, were significantly lower than respondents between 20 and 65 years old.

Marital status was another common characteristic of respondents who bought these items. Significantly higher proportions of married versus single respondents reported buying all three types of merchandise. This may, at least in part, be related to purchases by women for their husbands.

Shopping Frequency and Store Type and CBD Shopping

<u>"Dress" Clothing for men</u>, as indicated in the following three tables, is an item that nearly half [47%] of all respondents shop for "occasionally" or "often". Of those who have made purchases during the last year, over half [53%] report exclusive use of department stores and less than a third [31%] report using CBD or Station Square stores.

Table B1: Shopping Frequency for Men's "Dress" Clothing

Frequency	Number [Percent] of All Respondents
OFTEN	78 [12%]
OCCASIONALLY	234 [35%]
RARELY	161 [24%]
NOT IN A YEAR	196 [29%]
Valid Cases	669 [100%]

Table B2: Types of Stores Used for Men's "Dress" Clothing

Store Types	Number [Percent] of Respondents who Purchased Item
DEPARTMENT	253 [53%]
DISCOUNT	45 [10%]
SPECIALTY	105 [22%]
COMBINATION	70 [15%]
Valid Cases	473 [100%]

Table B3: Men's "Dress" Clothing Shopping in CBD / Station Square?

	Number [Percent] of Respondents who Purchased Item
YES	147 [31%]
NO	326 [69%]
Valid Cases	473 [100%]

The residential and work place locations of respondents are important factors in explaining who has shopped at CBD or Station Square stores for this merchandise. Significantly higher proportions of CBD workers and Pittsburgh residents shopped in these stores for this merchandise. However, CBD workers and City residents constituted only 16% and 31%, respectively, of the respondents who reported shopping in these stores for this merchandise.

Casual Clothing for men, as indicated in the following three tables, is an item that over half [55%] of all respondents shop for "occasionally" or "often". Of those who have made purchases during the last year, over half [54%] report exclusive use of department stores and less than a third [28%] report using CBD or Station Square stores.

Table B4: Shopping Frequency for Men's Casual Clothing

Frequency	Number [Percent] of All Respondents	
OFTEN	99	[15%]
OCCASIONALLY	267	[40%]
RARELY	132	[20%]
NOT IN A YEAR	171	[25%]
Valid Cases	669	[100%]

Table B5: Types of Stores Used for Men's Casual Clothing

Store Types	Number [Percent] of Respondents who Purchased Item	
DEPARTMENT	268	[54%]
DISCOUNT	69	[14%]
SPECIALTY	81	[16%]
COMBINATION	77	[16%]
Valid Cases	495	[100%]

Significantly higher proportions of men reported using Specialty stores in shopping for this merchandise. Higher proportions of women reported shopping for this merchandise at Department and Discount Stores.

Table B6: Men's Casual Clothing Shopping in CBD or Station Square?

	Number [Percent] of Respondents who Purchased Item	
YES	137	[28%]
NO	358	[72%]
Valid Cases	495	[100%]

The residential and work place locations of respondents are important factors in explaining who has shopped at CBD or Station Square stores for this merchandise. Significantly higher proportions of CBD workers and Pittsburgh residents shopped in these stores for this merchandise. CBD workers and City residents, however, constituted only 15% and 30%, respectively, of the respondents who reported shopping in these stores for this merchandise .

Almost eighty percent of the male respondents reported purchasing <u>men's shoes</u> in the last year; they constituted 54% of all respondents who reported making these purchases. Women reported making 46% of the men's shoe purchases.

As the following tables indicate, men's shoe shopping is not a frequent activity; over half of those who reported a purchase in the last year report that they shop for this merchandise "rarely".

Specialty stores are used exclusively by nearly two thirds [64%] of those who have made a purchase in the last year. A very low percentage [17%] of those who have made a purchase use CBD or Station Square stores.

Table B7: Shopping Frequency for Men's Shoes

Frequency	Number	[Percent] of All Respondents
OFTEN	22	[3%]
OCCASIONALLY	128	[19%]
RARELY	170	[26%]
NOT IN A YEAR	349	[52%]
Valid Cases	669	[100%]

Table B8: Types of Stores Used for Men's Shoes

Store Types	Number	[Percent] of Respondents who Purchased Item
DEPARTMENT	72	[22%]
DISCOUNT	21	[7%]
SPECIALTY	204	[64%]
COMBINATION	22	[7%]
Valid Cases	319	[100%]

Table B9: Men's Shoe Shopping in CBD or Station Square?

	Number	[Percent] of Respondents who Purchased Item
YES	54	[17%]
NO	264	[83%]
Valid Cases	318	[100%]

WOMEN'S CLOTHING & SHOES

All respondents were invited to discuss their purchase of three types of women's clothing: "dress", casual, and shoes. As indicated in the following sections, the respondents who bought these three lines of merchandise have some common characteristics.

Buyers' Characteristics

First, the overwhelming majority of respondents who bought women's clothing were women. Two thirds of all respondents reported buying women's "dress" clothing during the last year. These included 85% of female and 27% of male respondents.

Over 70% of all respondents reported buying women's "casual" clothing during the last year. These included 91% of the female and 31% of the male respondents.

Two thirds of all respondents reported buying women's shoes during the last year. These included 91% of the female and 16% of the male respondents.

With the exception of "dress" clothing, the proportions of respondents who reported making purchases did not differ significantly on the basis of household income. Significantly higher proportions of respondents who reported buying "dress" clothing, however, were from high income households.

> 73% of the respondents from households with incomes in excess of $ 30,000 reported making these purchases while only 62% of other respondents did.

In each of the three merchandise lines the proportions of respondents who were teenagers [under 20 years old] or seniors [over 65 years old], who bought the items, were significantly lower than respondents between 20 and 65 years old.

In each of the three merchandise lines the proportions of respondents from households with more than one person, who bought the items, were significantly higher than respondents from single person households.

Marital status was another common characteristic of respondents who bought these items. Significantly higher proportions of married versus single respondents reported buying all three types of merchandise.

> The overall distinguishing characteristics of the women's clothing buyer is a female, who is likely to be married and living in a household with others, and is between 20 and 65 years old. If this buyer is from a relatively high income household, "dress" clothing is more likely to be among the merchandise that is being bought.

Shopping Frequency and Store Type and CBD Shopping

<u>"Dress" Clothing for women</u>, as indicated in the following three tables, is an item that almost half [48%] of all respondents shop for "occasionally" or "often". Of those who have made purchases during the last year, over half [57%] report exclusive use of department stores and less than a third [31%] report using CBD or Station Square stores.

Table B10: Shopping Frequency for Women's "Dress" Clothing

Frequency	Number [Percent] of All Respondents
OFTEN	132 [20%]
OCCASIONALLY	185 [28%]
RARELY	123 [18%]
NOT IN A YEAR	227 [34%]
Valid Cases	667 [100%]

Table B11: Types of Stores Used for Women's "Dress" Clothing

Store Types	Number [Percent] of Respondents who Purchased Item
DEPARTMENT	250 [57%]
DISCOUNT	43 [10%]
SPECIALTY	61 [14%]
COMBINATION	88 [20%]
Valid Cases	442 [100%]

Table B12: Women's "Dress" Clothing Shopping in CBD/Station Square?

	Number [Percent] of Respondents who Purchased Item
YES	138 [31%]
NO	302 [69%]
Valid Cases	440 [100%]

The work place locations of respondents are important factors in explaining who has shopped at CBD or Station Square stores for this merchandise. Significantly higher proportions of CBD workers shopped in these stores for this merchandise. However, CBD workers constituted only 18% of the respondents who reported shopping in these stores for Women's "Dress" Clothing.

<u>Casual Clothing for women</u>, as indicated in the following three tables, is an item that over half [58%] of all respondents shop for "occasionally" or "often". Of those who have made purchases during the last year, half [49%] report exclusive use of department stores and less than a third [27%] report using CBD or Station Square stores.

Table B13: Shopping Frequency for Women's Casual Clothing

Frequency	Number [Percent] of All Respondents
OFTEN	160 [24%]
OCCASIONALLY	228 [34%]
RARELY	89 [13%]
NOT IN A YEAR	191 [29%]
Valid Cases	668 [100%]

Table B14: Types of Stores Used for Women's Casual Clothing

Store Types	Number [Percent] of Respondents who Purchased Item
DEPARTMENT	233 [49%]
DISCOUNT	79 [17%]
SPECIALTY	63 [13%]
COMBINATION	102 [21%]
Valid Cases	477 [100%]

Table B15: Women's Casual Clothing Shopping in CBD/Station Square?

	Number [Percent] of Respondents who Purchased Item
YES	129 [27%]
NO	343 [73%]
Valid Cases	472 [100%]

The work place locations of respondents are important factors in explaining who has shopped for this merchandise at CBD or Station Square stores. Significantly higher proportions of CBD workers shopped in these stores for this merchandise. CBD workers, however, constituted only 16% of the respondents who reported shopping in these stores for Women's Casual Clothing.

There was another significant factor that distinguished respondents who had shopped in the downtown area for Women's Casual Clothing: household income. As presented in the following Table, higher proportions of people from higher income households shop for Women's Casual Clothing downtown.

Table B16: Household Income of Downtown Shoppers who Purchased Women's Casual Clothing in the Last Year

Household Income	Number [Percentage] of Respondents in Income Group that Report Downtown Shopping for this Merchandise		
Under $15,000	12	11%	[15%]
$15 - $30,000	40	35%	[23%]
$30 - $60,000	44	39%	[31%]
Over $60,000	17	15%	[40%]
Total	113	100%	

Over ninety percent of the female respondents reported purchasing <u>women's shoes</u> in the last year; they constituted 92% of all respondents who reported making these purchases. Men reported making 8% of the women's shoe purchases.

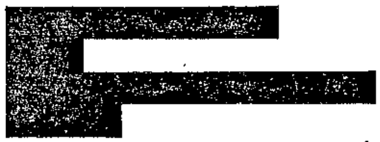
As the following tables indicate, women's shoe shopping is a frequent activity; almost two thirds of those who reported a purchase in the last year report that they shop for this merchandise "occasionally" or "frequently".

Specialty and Department stores are used by over three quarters of those who have made a purchase in the last year. Less than a quarter [21%] of those who have made a shoe purchase shop at CBD or Station Square stores.

Table B17: Shopping Frequency for Women's Shoes

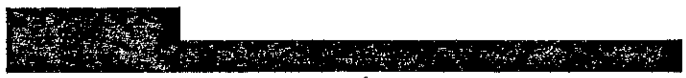
Frequency	Number [Percent] of All Respondents	
OFTEN	82	[12%]
OCCASIONALLY	208	[31%]
RARELY	152	[23%]
NOT IN A YEAR	227	[34%]
Valid Cases	669	[100%]

Table B18: Types of Stores Used for Women's Shoes



Store Types	Number [Percent] of Respondents who Purchased Item
DEPARTMENT	144 [33%]
DISCOUNT	44 [10%]
SPECIALTY	190 [43%]
COMBINATION	64 [14%]
Valid Cases	442 [100%]

Table B19: Women's Shoe Shopping in CBD or Station Square?



	Number [Percent] of Respondents who Purchased Item
YES	90 [21%]
NO	346 [79%]
Valid Cases	436 [100%]

The work place locations of respondents are important factors in explaining who has shopped at CBD or Station Square stores for the merchandise. Significantly higher proportions of CBD workers shopped in these stores for this merchandise. However, CBD workers constituted only 23% of the respondents who reported shopping in these stores for Women's Shoes.

JEWELRY

All respondents were invited to discuss their jewelry purchases during the past year. Approximately half of all respondents reported buying jewelry during the past year. Half of the women and 46% of the men reported making these purchases.

Buyers' Characteristics

The proportions of respondents who reported making these purchases were directly related to the respondents' household incomes. While approximately a third of those whose household income was less than $15,000 were buyers, 64% of those in households with incomes in excess of $60,000 were buyers. The following Table presents this finding and the number of jewelry buyers by income group.

Table B20: Household Income of Downtown Shoppers who Purchased Jewelry in the Last Year

Household Income	Number [Percentage] of Respondents in Income Group that Report Downtown Shopping for this Merchandise		
Under $15,000	43	14%	[34%]
$15 - $30,000	114	37%	[48%]
$30 - $60,000	114	37%	[56%]
Over $60,000	34	11%	[64%]
Total	305	99%	

Table B21: Age of Downtown Shoppers who Purchased Jewelry in the Last Year

Age Group	Number [Percentage] of Respondents in Each Age Group that Report Downtown Shopping for this Merchandise		
15 - 19	41	13%	[63%]
20 - 29	68	21%	[54%]
30 - 45	109	34%	[51%]
46 - 65	82	25%	[49%]
Over 65	24	7	[26%]
Total	324	100%	

The proportions of respondents who reported making these purchases were inversely related to the respondents' age group. While approximately a quarter of the "seniors" were buyers, 63% of teenagers were buyers. Table B21 presents this finding and shows the number of buyers by their age group.

Shopping Frequency and Store Type and CBD Shopping

As the following three tables indicate, jewelry is a line of merchandise for which less than a quarter [21%] of all respondents report shopping "occasionally" or "often". Of those who reported making a jewelry purchase during the last year over half do their shopping exclusively at Specialty Stores and fewer than a quarter shop at CBD or Station Square stores for jewelry.

Table B22: Shopping Frequency for Jewelry

Frequency	Number [Percent] of All Respondents
OFTEN	31 [5%]
OCCASIONALLY	107 [16%]
RARELY	185 [28%]
NOT IN A YEAR	344 [51%]
Valid Cases	667 [100%]

Table B23: Types of Stores Used for Jewelry

Store Types	Number [Percent] of Respondents who Purchased Item
DEPARTMENT	91 [28%]
DISCOUNT	23 [7%]
SPECIALTY	171 [53%]
COMBINATION	39 [12%]
Valid Cases	324 [100%]

Table B24: Jewelry Shopping in CBD or Station Square?

	Number [Percent] of Respondents who Purchased Item
YES	75 [23%]
NO	246 [77%]
Valid Cases	321 [100%]

The work place locations of respondents are important factors in explaining who has shopped at CBD or Station Square stores for jewelry. Significantly higher proportions of CBD workers shopped in these stores for this merchandise. However, CBD workers constituted only 20% of the respondents who reported shopping in these stores for jewelry.

HOUSEWARES

All respondents were invited to discuss their purchases of "housewares" during the past year. Slightly more than half [54%] of all respondents reported buying housewares during the past year; 56% of the women and 48% of the men reported making these purchases.

Buyers' Characteristics

The proportions of respondents who reported making these purchases were directly related to the respondents' household incomes. While 38% of those whose household income was less than $ 15,000 were buyers, 70% of those in households with incomes in excess of $60,000 were buyers. Table B25 presents these findings and the numbers of Housewares shoppers by household income categories.

Table B25: Household Income of Downtown Shoppers who Purchased Housewares in the Last Year

Household Income	Number [Percentage] of Respondents in Income Group that Report Downtown Shopping for this Merchandise		
Under $15,000	48	14%	[38%]
$15 - $30,000	130	38%	[54%]
$30 - $60,000	130	38%	[64%]
Over $60,000	37	10%	[70%]
Total	345	100%	

The proportions of respondents who were teenagers [under 20 years old] or seniors [over 65 years old], who bought housewares, were significantly lower than respondents between 20 and 65 years old. High proportions of the teenagers probably do not have housekeeping responsibilities while seniors are likely to have accumulated more of their housewares.

Table B26: Age of Downtown Shoppers who Purchased Housewares in the Last Year

Age Group	Number [Percentage] of Respondents in Each Age Group that Report Downtown Shopping for this Merchandise		
15 - 19	9	3%	[14%]
20 - 29	66	18%	[52%]
30 - 45	153	43%	[72%]
46 - 65	102	29%	[61%]
Over 65	27	8%	[29%]
Total	357	100%	

Marital status was another common characteristic of respondents who bought housewares. Significantly higher proportions of married [60%] versus single [45%] respondents reported buying this merchandise. This phenomena is most likely related to families' needs for housewares; this finding also reinforces the finding about age.

Shopping Frequency and Store Type and CBD Shopping

Almost a third of all respondents report shopping "occasionally" or "often" for housewares. Of those respondents who have purchased housewares in the past year, 39% report shopping for these items exclusively in Discount Department Stores while another 31% report shopping exclusively in Full Line Department Stores. Only 15% of these housewares buyers report shopping for these items in CBD or Station Square stores. The following three tables present these findings.

Table B27: Shopping Frequency for Housewares

Frequency	Number [Percent] of All Respondents
OFTEN	47 [7%]
OCCASIONALLY	169 [25%]
RARELY	143 [21%]
NOT IN A YEAR	309 [45%]
Valid Cases	668 [100%]

Table B28: Types of Stores Used for Housewares

Store Types	Number [Percent] of Respondents who Purchased Item
DEPARTMENT	110 [31%]
DISCOUNT	142 [39%]
SPECIALTY	58 [16%]
COMBINATION	50 [14%]
Valid Cases	360 [100%]

Table B29: Housewares Shopping in CBD or Station Square?

	Number [Percent] of Respondents who Purchased Item
YES	55 [15%]
NO	301 [85%]
Valid Cases	356 [100%]

FURNITURE

All respondents were invited to discuss their purchases of furniture during the past year. Less than a third of all respondents reported buying furniture during the past year; 32% of the women and 30% of the men reported making these purchases.

Buyers' Characteristics

The proportions of respondents who reported making these purchases were related to the respondents' household incomes. While 13% of those whose household income was less than $ 15,000 were buyers, 44% of those in households with incomes in excess of $30,000 were buyers.

Table B30: Household Income of Downtown Shoppers who Purchased Furniture in the Last Year

Household Income	Number [Percentage] of Respondents in Income Group that Report Downtown Shopping for this Merchandise		
Under $15,000	16	8%	[13%]
$15 - $30,000	74	36%	[31%]
$30 - $60,000	90	44%	[45%]
Over $60,000	23	11%	[43%]
Total	203	99%	

The proportions of respondents who were teenagers [under 20 years old] or seniors [over 65 years old], who bought furniture, were significantly lower than respondents between 20 and 65 years old. The age group with the highest percentage of furniture buyers, 41%, is the 30 to 45 year old group. This segment also constitutes 42% of all the respondents who reported buying furniture. Traditionally, people in this age group are establishing households; they make furniture, housewares, and related purchases at higher rates than younger or older consumers.

Table B31: Age of Downtown Shoppers who Purchased Furniture in the Last Year

Age Group	Number [Percentage] of Respondents in Each Age Group that Report Downtown Shopping for this Merchandise		
15 - 19	5	2%	[8%]
20 - 29	43	21%	[34%]
30 - 45	87	42%	[41%]
46 - 65	56	27%	[34%]
Over 65	17	8%	[18%]
Total	208	100%	

Marital status was another common characteristic of respondents who bought furniture. Significantly higher proportions of married [38%] versus single [22%] respondents reported buying this merchandise. This phenomena is most likely related to the establishment of households, as mentioned earlier.

Shopping Frequency and Store Type and CBD Shopping

Furniture shopping is an infrequent activity; over 90% of all respondents report doing it either "rarely" or "not during the last year". It follows that when people do purchase furniture a majority [60%] shop exclusively at Specialty Stores and that another quarter shop exclusively at Department Stores. Less than a tenth of those who purchased furniture in the last year shopped in CBD or Station Square stores for it. The following three tables present these findings.

Table B32: Shopping Frequency for Furniture

Frequency	Number [Percent] of All Respondents
OFTEN	5 [1%]
OCCASIONALLY	44 [7%]
RARELY	160 [24%]
NOT IN A YEAR	> 459 [68%]
Valid Cases	668 [100%]

Table B33: Types of Stores Used for Furniture Shopping

Store Types	Number [Percent] of Respondents who Purchased Item
DEPARTMENT	49 [24%]
DISCOUNT	16 [8%]
SPECIALTY	125 [60%]
COMBINATION	17 [8%]
Valid Cases	207 [100%]

Table B34: Furniture Shopping in CBD or Station Square?

	Number [Percent] of Respondents who Purchased Item
YES	17 [8%]
NO	190 [92%]
Valid Cases	207 [100%]

HOME ENTERTAINMENT EQUIPMENT

All respondents were invited to discuss their purchases of Home Entertainment Equipment such as televisions, stereo systems, and relate items during the past year. Approximately 37% of all respondents reported buying furniture during the past year; 34% of the women and 42% of the men reported making these purchases.

Buyers' Characteristics

The proportions of respondents who reported making these purchases were directly related to the respondents' household incomes. While 20% of those whose household income was less than $ 15,000 were buyers, 49% of those in households with incomes in excess of $60,000 were buyers.

Table B35: Household Income of Downtown Shoppers who Purchased Home Entertainment Equipment in the Last Year

Household Income	Number [Percentage] of Respondents in Income Group that Report Downtown Shopping for this Merchandise		
Under $15,000	25	11%	[20%]
$15 - $30,000	89	38%	[37%]
$30 - $60,000	93	40%	[46%]
Over $60,000	26	11%	[49%]
Total	233	100%	

As indicated in Table B36 a significantly low proportion of seniors [17%] compared to non seniors reported buying Home Entertainment Equipment in the last year.

Table B36: Age of Downtown Shoppers who Purchased Home Entertainment Equipment in the Last Year

Age Group	Number [Percentage] of Respondents in Each Age Group that Report Downtown Shopping for this Merchandise		
15 - 19	26	11%	[40%]
20 - 29	45	18%	[36%]
30 - 45	92	38%	[43%]
46 - 65	65	27%	[39%]
Over 65	16	6%	[17%]
Total	244	100%	

Shopping Frequency and Store Type and CBD Shopping

As the following three tables demonstrate, Home Entertainment Equipment shopping frequency, store choice, and store location [in the downtown or not] is essentially the same as the patterns for Furniture shopping.

It is an infrequent activity; over 90% of all respondents report doing it either "rarely" or "not during the last year'. It follows that when people do purchase Home Entertainment Equipment a majority [53%] shop exclusively at Specialty Stores and that another quarter shop exclusively at Department Stores. Less than a tenth of those who purchased these types of merchandise in the last year shopped in CBD or Station Square stores for it.

Table B37: Shopping Frequency for Home Entertainment Equipment

Frequency	Number [Percent] of All Respondents	
OFTEN	8	[1%]
OCCASIONALLY	54	[8%]
RARELY	184	[28%]
NOT IN A YEAR	> 423	[63%]
Valid Cases	669	[100%]

Table B38: Types of Stores Used for Home Entertainment Equipment

Store Types	Number [Percent] of Respondents who Purchased Item	
DEPARTMENT	64	[26%]
DISCOUNT	33	[14%]
SPECIALTY	130	[53%]
COMBINATION	18	[7%]
Valid Cases	245	[100%]

Table B39: Home Entertainment Equipment Shopping in CBD or Station Square?

	Number [Percent] of Respondents who Purchased Item	
YES	22	[9%]
NO	217	[91%]
Valid Cases	239	[100%]