DOWNTOWN ST. LOUIS 2008 PERCEPTION AND USE ASSESSMENTS

prepared for

Partnership for Downtown St. Louis

November, 2008

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FOREWORD

This research was designed to provide a baseline assessment of discretionary (non-work) usage of Downtown St. Louis by residents of St. Louis City and seven counties contiguous to the city. The secondary goals were to examine perceptions of cleanliness, safety, and parking convenience in Downtown St. Louis among current patrons and to probe reasons for non-use of Downtown St. Louis. This research can be used to communicate broad messages about users' behaviors and attitudes to Downtown's multiple constituencies (the Partnership for Downtown St. Louis, various agencies of the City of St. Louis, property owners, existing/potential business investors, real estate brokers, and various cultural and civic organizations). The survey provides an empirical measurement of the Downtown Partnership's efforts to enhance the actual and perceived cleanliness, safety, and friendliness of Downtown St. Louis.

The data generated by the survey can serve as the most fundamental tool for improving the performance of existing businesses while providing facts to compel additional Downtown investment and business recruitment.

This year's survey can be viewed as a "snapshot in time" as well as the first of a series that may be conducted in the future. The ultimate value of this research is found in the actions undertaken in response to the strategic challenges it identifies.

Small sample research such as this annual survey is subject to margins of error of 5 percent at the most basic level ("Did you visit Downtown last year?") or more when subsets of the sample are small ("How many times did 18-24 year olds visit Downtown St. Louis?"). Despite the inherent limitations of small sample research, we place value in the survey to provide a reasonable assessment of Downtown visitation metrics. Downtown's promoters have an important opportunity to strengthen the bond between Downtown St. Louis and residents of the region and to add new retail uses that are compatible with patrons drawn to Downtown for a primary purpose other than shopping.

It is likely that Downtown's patrons will respond to new stores, restaurants, entertainment venues, and event programming as Downtown's offering grows. Consistent and pervasive marketing must inform potential patrons about reasons for visiting Downtown and create the desire to visit with sufficient intensity to overcome concerns about distance from home, traffic congestion, and considerations of safety and parking cost and/or availability. As an observer of this Downtown and other urban areas, it is imperative that Downtown St. Louis's offerings remain unique and of high quality in order to compel visits from suburban residents from a broad geographic area—especially those who live in areas that are served by retailers and restaurants of every level of quality. It is these points of differentiation that will make Downtown worthy of visits by residents who have ample retail offerings in their neighborhoods.

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H. Blount Hunter Retail & Real Estate Research Co.
November, 2008

METHODOLOGY

This survey was conducted by random telephone interviews executed by Pragmatic Research of Clayton, MO from October 18 through 30, 2008. The survey was conducted using a random list of "listed residential phone numbers" filtered to exclude households with incomes below $20,000. The Partnership for Downtown St. Louis specified the counties to be included in the calling area; the calling area included the City of St. Louis and seven counties contiguous to St. Louis City. The calling area did not encompass the entire St. Louis MSA. The final dataset included 750 completed interviews with useable zip code data with the distribution of completed surveys reflecting the approximate distribution of households within the designated calling area by county:

2008 RESPONDENTS	
St. Louis City	105
St. Louis County	298
St. Charles County	95
Jefferson County	59
Franklin County	28
Madison County, IL	80
St. Clair County, IL	76
Monroe County, IL	9
TOTAL SAMPLE:	750

Adults over age 18 were eligible to participate in the surveying. Interviewers attempted to contact randomly selected households up to several times before choosing alternative households. Surveying occurred primarily during the late afternoon and early evening during the week and during the weekend. This process assures inclusion of working and non-working adults.

Data was entered directly into a computer using Computer Assisted Telephone Interviewing (CATI) technology. This increases accuracy and reduces the time required to access data upon completion of surveying. A supervisor was present at all times, and supervisory personnel monitored interviews. The data has been analyzed using SNAP Survey Analysis software.

SURVEY RESPONDENTS VS. CALLING AREA ADULT POPULATION

A comparison of datasets reveals some differences between the randomly generated survey sample and the adult population of the eight-county telephone calling area.

- ✓ By design, interviewers asked to speak to the youngest household member age 18+ as their first choice for survey participant. Despite this attempt to reach 18 to 24 year olds, this age segment remained elusive. Their active lifestyles and the procedural inability to conduct this survey via cell phone impacted the sample of 18 to 24 year olds.

- ✓ The survey sample over-represented adults between the ages of 35 and 44 as well as adults age 55+ compared to their presence in the population of the calling area.

- ✓ The survey sample is a generally well-balanced reflection of the distribution of households with incomes over $20,000 within the telephone calling area. Households with incomes between $60,000 and $99,999 were over-represented in the telephone sample.

- ✓ The survey sample included more females than the population of the telephone calling area.

2008 SURVEY RESPONDENTS COMPARED TO CALLING AREA POPULATION		
	N=750 2008	**CALLING AREA TOTAL**
18 to 24	3%	13%
25 to 34	13%	17%
35 to 44	27%	18%
45 to 54	20%	20%
55 to 64	27%	15%
65 +	20%	17%
Total	100%	100%
Under $20,000	9%	17%
$20,000 to $39,999	17%	21%
$40,000 to $59,999	24%	20%
$60,000 to $99,999	34%	26%
$100,000 to $149,999	11%	11%
$150,000+	5%	5%
Total	100%	100%
Caucasian	80%	89%
African American	10%	8%
Male	39%	48%
Female	61%	52%

Because of the age skew, the data has been weighted to more accurately reflect the age distribution of the adult population of the telephone calling area.

EXPLANATION OF TERMS

At various times where appropriate, the following terms are used:

Downtown Users: Anyone who--for any purpose--visited Downtown St. Louis during the past year; the most inclusive measure of Downtown usage including workers and those making non-work visits. N=582

Non-Users: Anyone who did not visit Downtown St. Louis during the past year for any reason. N=168

Non-Work Trip / Patron: A specific sub-set of Current Downtown Users consisting of those who have made a visit to Downtown for a discretionary purpose excluding respondents who are Downtown workers. Non-work users are highlighted throughout this analysis because they are the focus of the Downtown Partnership's marketing efforts to stimulate discretionary visits to Downtown for shopping, dining, and recreational pursuits. N=562

Downtown Worker: Respondent whose place of employment is located within Downtown St. Louis. N=70

Annual Penetration Rate: The proportion of a consumer segment who has visited Downtown St. Louis in the past year; also known as "usage rate," "reach." and "market share."

Frequency: The number of visits to Downtown St. Louis or any specific destination within Downtown in the past 12 months.

Margin of Error: The random sampling process used as the basis of this report involves the use of a small sample to represent a complete census. For practical purposes and because of cost limitations, it is possible only to speak to a representative sample of the total adult population of the St. Louis MSA. The survey's margin of error refers to the probable range of difference between the results of a small sample survey and the results that would be generated if a complete census could be conducted. At a sample size of 750, there is a 95 percent confidence that the largest margin of error is plus or minus 2.0 percentage points. There is a greater margin of error on sub-samples of the survey (e. g. individual questions).

EXECUTIVE SUMMARY

1. Downtown St. Louis's annual usage rate (or "penetration") among adult residents of the telephone calling area was 77 percent. This reflects discretionary or non-work visits to Downtown. Most area residents who have not visited Downtown St. Louis during the past 12 months have visited Downtown within the past 4 years. The primary reason cited for not visiting Downtown is "nothing of interest to me in Downtown."

2. Downtown's penetration of local adults is highest among 25 to 44 year olds. This is a strong consumer base for retailers, restaurants, and entertainment venues.

3. Downtown St. Louis's penetration generally increases as education and household income increase. Approximately 90 percent of calling area households with incomes over $80,000 have been to Downtown St. Louis for non-work purposes over the past year. This is a strong environment for retailers and restaurants. This contrasts with the image of many Downtown areas and reflects the bundling of many arts/cultural venues, quality dining options, and a high caliber event calendar.

4. Average annual Downtown visitation for non-work purposes is 19 trips—an average of one visit every three weeks. The highest frequency of use for non-work purposes occurs among 18 to 34 year olds and those with household incomes over $100,000. These aspects of discretionary usage are also positive for retail recruitment.

5. Attending professional or college sports events is the most powerful non-work trip generator in Downtown St. Louis with almost three-quarters of Downtown's users citing at least one visit for this purpose in the past year. Approximately half of all users visited Downtown to go to a casual-dining restaurant or to attend an outdoor community event/festival. The proportion of adults reporting any "shopping" trips for street shops or St. Louis Union Station was very modest at 33 percent; the share reporting any trips primarily destined to Macy's was lower at 15 percent.

6. The "most liked" aspect of Downtown St. Louis is its sporting events. The least liked aspects of Downtown among its users are parking, traffic congestion, and safety.

7. Current users want more parking, more shopping options, and enhanced safety as conditions of using Downtown more often.

8. Downtown's users give it the highest perceptual ratings for safety during the day, being a good place to take visitors, easy access by car, and good selection of restaurants and dining options. Downtown's lowest ratings are for supply of well-located parking spaces and safety at night.

Downtown's current non-work users visit widely-dispersed venues and areas within Downtown for a variety of reasons unrelated to shopping. Shopping is a minor trip motivator today. Downtown's current users represent a large potential consumer base if more of them can be exposed to retail goods regardless of their primary rationale for visiting Downtown. Can shopping become a "secondary activity" on a higher share of non-work trips until a critical mass of retailing has sufficient drawing power to attract "destination shopping trips" to Downtown St. Louis?

ANNUAL DOWNTOWN USAGE RATE

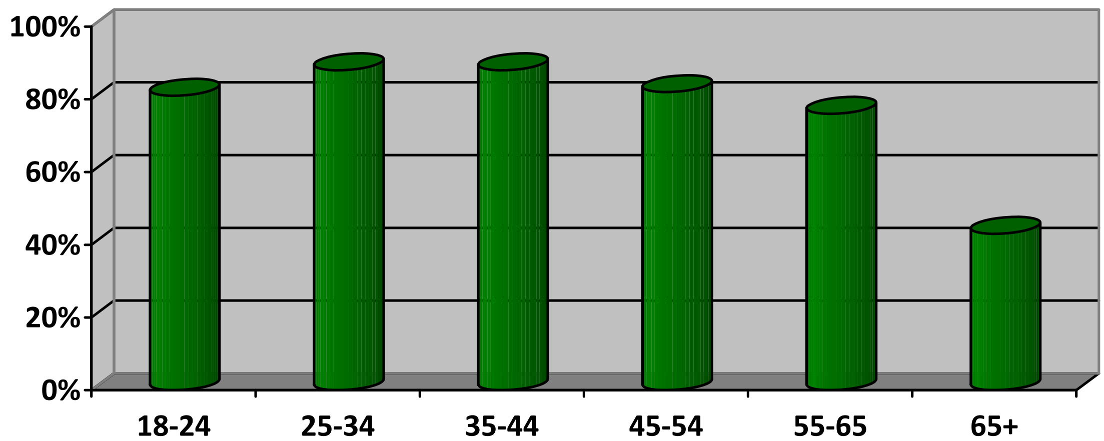
Across the adult population of the five-county calling area, 79 percent have made at least one visit to Downtown St. Louis in the past year for work or a discretionary purpose (i.e. non-work visit). Fully 77 percent of adults have visited Downtown for at least one non-work visit.

Downtown St. Louis's greatest appeal is relatively young residents and affluent households.

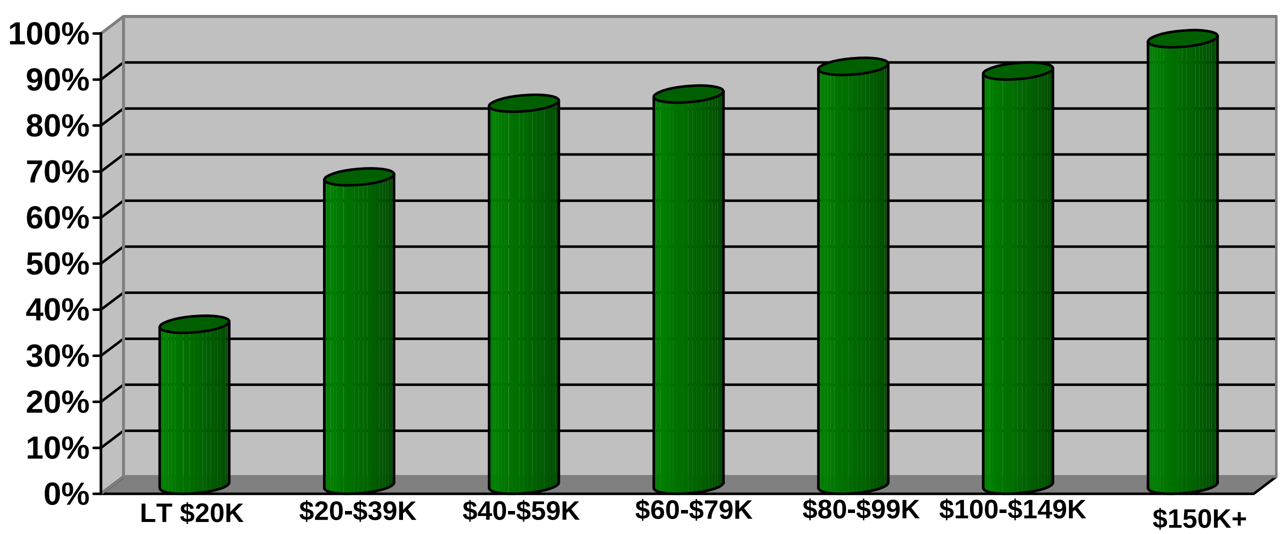
- ✓ Downtown St. Louis's usage rate highest among adults between 25 and 44 years old and lowest among residents over age 65.
- ✓ Downtown's usage rate increased in positive correlation with increasing household income. The highest usage rate was recorded among adults in households with incomes over $150,000.
- ✓ Downtown's usage rates were similar among Caucasians and African Americans; Downtown's usage rate was minimally higher among males.

2008 USAGE RATE			
	N=750 2008		**N=750 2008**
18 to 24	81%	Under $20,000	35%
25 to 34	88%	$20,000 to $39,999	67%
35 to 44	88%	$40,000 to $59,999	83%
45 to 54	82%	$60,000 to $79,999	85%
55 to 64	76%	$80,000 to $99,999	91%
65 +	43%	$100,000 to $149,999	90%
		$150,000+	97%
Males	80%		
Females	75%		
Caucasians	78%	All Adults	77%
African Americans	74%		

USE BY AGE



USE BY HOUSEHOLD INCOME



TIMING OF LAST VISIT TO DOWNTOWN ST. LOUIS

A majority of those respondents who did not visit Downtown St. Louis during the last year have visited within the past several years. This broadens the understanding of non-users and illustrates that non-use in the past year is not synonymous with never having visited Downtown.

- ✓ Only a small percentage of adults (3 percent) in the St. Louis calling area have never visited Downtown St. Louis.

- ✓ Nearly two-thirds (64 percent) of those local adults who have not visited Downtown in the past year have visited Downtown St. Louis within the past four years.

TIMING OF LAST VISIT TO DOWNTOWN ST. LOUIS	
	N=168 2008
Visited between 1 and 2 years ago	42%
Visited between 2 and 4 years ago	22%
Visited between 4 and 10 years ago	11%
Visited more than 10 years ago	22%
Have Never Visited Downtown St. Louis	3%

Respondents provided a variety of reasons for not visiting Downtown St. Louis including age/infirmity, lack of transportation, fear of crime, dislike of crowds, but the prevailing explanations for not visiting Downtown is “no reason to go” or “can shop/dine/get entertainment closer to home.”

The primary reason cited for not visiting Downtown St. Louis in the past year suggests the need for a constant communication about the diversity of events and activities in Downtown as well as publicity about new stores, restaurants, and entertainment venues to generate interest and sustain use of Downtown. The challenge of “remaining fresh and compelling” to current users and to provide reasons for use by non-users is faced by many venues including museums, theme parks, shopping centers, and individual retail stores.

AVERAGE ANNUAL FREQUENCY OF NON-WORK VISITATION

Tracking the frequency of discretionary visits (i.e. non-work trips) to Downtown St. Louis is one of the core benchmarking goals of this research. Among all calling area adults, average annual frequency of Downtown visits for non-work purposes was 19 visits or approximately once every three weeks.

- ✓ The least frequent non-work patrons of Downtown are people over age 65. Residents between the ages of 35 and 44 and between the ages of 55 and 64 also show below-average frequency of use.

- ✓ As with incidence of non-work use of Downtown, average frequency of non-work use of Downtown generally correlates with income. Households with incomes over $150,000 demonstrated the highest incidence of discretionary use of Downtown as well as the highest average frequency of discretionary use.

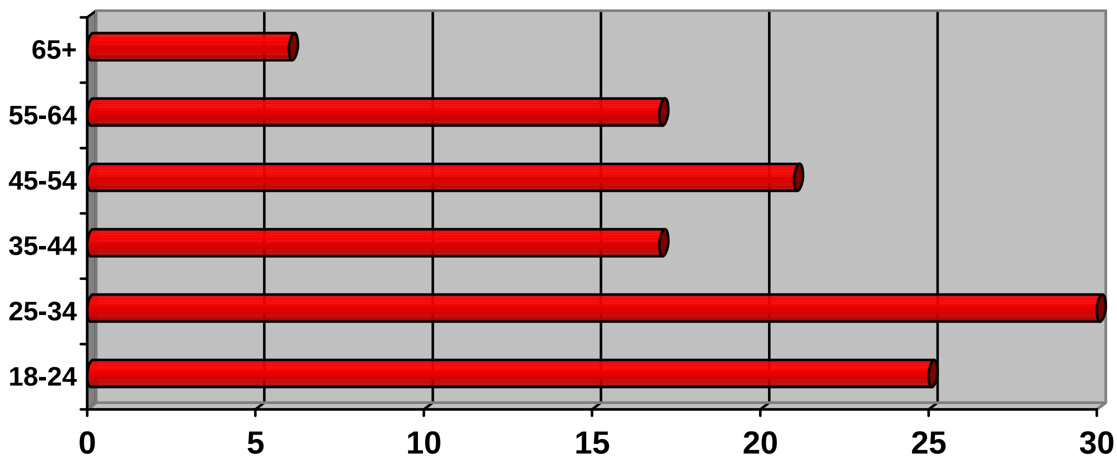
- ✓ African American users visit Downtown more frequently than Caucasians, and male patrons visit more frequently than female patrons.

2006 AVERAGE FREQUENCY OF USE			
	N=562 2008		**N=562 2008**
18 to 24	25 X	Under $20,000	6 X
25 to 34	30 X	$20,000 to $39,999	9 X
35 to 44	17 X	$40,000 to $59,999	14 X
45 to 54	21 X	$60,000 to $79,999	26 X
55 to 64	17 X	$80,000 to $99,999	19 X
65 +	6 X	$100,000 to $149,999	25 X
		$150,000+	26 X
Males	22 X		
Females	14 X	All Adults	19 X
Caucasians	16 X		
African Americans	25 X		

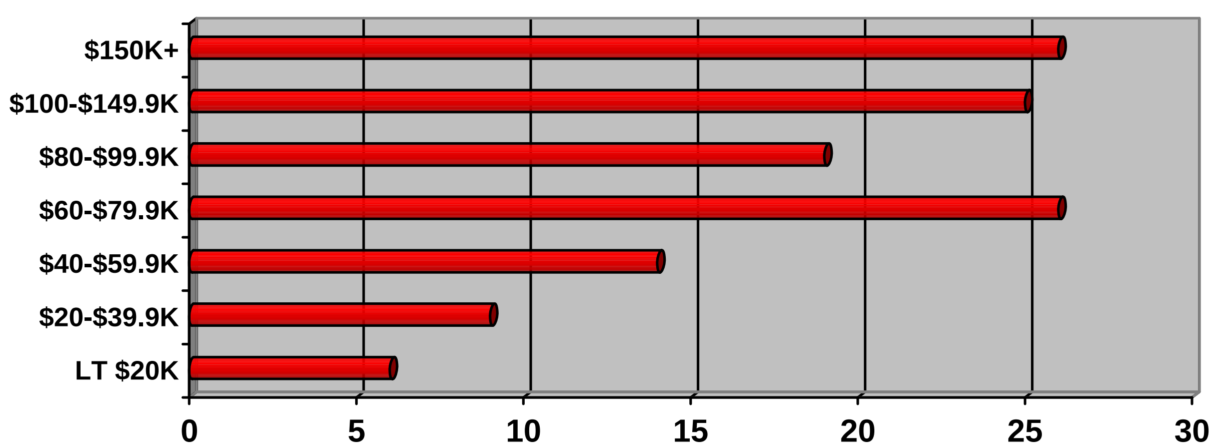
The median frequency of visits was 6 meaning that half of the respondents visited more than 6 times while half visited less than 6 times during the past 12 months. ***Downtown St. Louis has a significant segment of infrequent users and a small segment of high frequency patrons.***

ANNUAL DOWNTOWN VISIT FREQUENCY			
1 to 3 visits	21 percent	17 to 20 visits	6 percent
4 to 6 visits	15 percent	21 to 25 visits	6 percent
7 to 10 visits	12 percent	26 to 30 visits	4 percent
11 to 16 visits	15 percent	31+ visits	21 percent

**ANNUAL AVERAGE FREQUENCY
BY AGE**



**ANNUAL AVERAGE FREQUENCY
BY HOUSEHOLD INCOME**



The most affluent households are Downtown's most frequent discretionary-use patrons. This finding should be compelling to retailers and restaurateurs considering locations in Downtown. Comparatively low frequency of use by 35 to 44 year olds is surprising and disappointing in light of peak use by this age segment.

INCIDENCE AND FREQUENCY OF USE BY VISIT MOTIVATION

On average, non-work patrons visited Downtown 19 times in the past year or slightly less than twice per month. Downtown St. Louis is a destination for professional and college sports events, and it resembles many resurgent Downtown areas in that restaurants form another powerful trip generator. This benchmark measurement of Downtown as a destination for "shopping" can be used to measure growth in the importance of this motivation in generating Downtown visits.

- ✓ In the past year, 73 percent of Downtown's users visited Downtown for a professional or college sporting event. On average, Downtown's patrons visited 4.9 times for professional sports.
- ✓ More than half (55 percent) of Downtown's patrons visited for dining in a casual restaurant or pub. On average, these patrons visited 4.7 times for casual restaurant dining.
- ✓ Half (49 percent) of all Downtown patrons visited Downtown to attend one or more outdoor events such as a parade, concert or festival. The average number of visits for attending an outdoor event was modest at 1.7 trips.
- ✓ Slightly fewer than half (44 percent) of Downtown patrons reported attending any concert or non-sports event at Scottrade Center or America's Center. The average frequency of visits for any concert or non-sports event at these two major venues was 1.0 trip.
- ✓ Shopping is currently a minor trip generator. Only 15 percent of Downtown patrons reported any trips primarily motivated by visiting Macy's in Downtown St. Louis while 33 percent reported any trips primarily for browsing or shopping at stores on streets such as Washington Avenue or Union Station. The average frequency of shopping at Macy's was 0.9 trip while the average frequency for other shopping in Downtown was 1.5 visits. As a frame of reference, suburban mall patrons tend to shop in their primary regional mall approximately 3 times per month or 36 times per year just in their preferred mall.

INCIDENCE AND FREQUENCY OF DOWNTOWN USAGE BY PURPOSE OF VISIT		
	N=562 2008	AVERAGE FREQUENCY
To any professional or college sports (Busch Stadium, Dome, Scottrade Center):	73%	4.9 X
For casual dining in any restaurants or pubs:	55%	4.7 X
To outdoor event (concert, parade, festival) including Riverfront/Gateway Mall:	49%	1.7 X
To any non-sporting event at Scottrade Center or America's Center:	44%	1.0 X
For fine dining in restaurants with entrees $20+:	37%	1.9 X
To any music club, nightclub or other evening/late night entertainment:	36%	2.9 X
To browse or shop at street level stores or at Union Station:	33%	1.5 X
For any gaming at Lumiere Place or The President:	26%	1.2 X
To go to any city, state or federal government office:	24%	1.2 X
To browse or shop at Macy's:	15%	0.9 X
To visit Downtown for any other reasons:	32%	2.3 X
Total Adult Market Penetration:	77%	19.1 X

Downtown's users were asked about visitation of major destinations within Downtown St. Louis.

- ✓ In the past year, 44 percent of Downtown users (and, by inference, approximately one-third of all adults in the calling area) visited St. Louis Union Station. Frequency of visiting was low.

- ✓ In the past year, similar proportions of Downtown users visited The Gateway Arch and Laclede's Landing on non-gaming trips. Visit frequency was low for these destinations, too.

INCIDENCE AND FREQUENCY OF VISITS TO KEY DOWNTOWN DESTINATIONS		
	N=562 2008	**AVERAGE FREQUENCY**
St. Louis Union Station:	44%	1.3 X
Laclede's Landing (non-gaming):	42%	1.7 X
The Gateway Arch:	42%	1.1 X
City Museum:	37%	0.8 X
Washington Avenue:	36%	1.8 X

Downtown St. Louis is a mixed-use setting with a variety of reasons for visiting. As expected, many visits to Downtown St. Louis involve dining, entertainment, and sports activities, while "shopping" is the primary motivator for a lesser number of trips. As the retail base expands, "shopping" can become a "secondary" activity regardless of primary visit purpose. Over time, "shopping" may also become a primary trip motivator among targeted demographic groups.

CHANGE IN FREQUENCY OF DOWNTOWN USE

Downtown users were asked about changes in frequency of non-work visits to Downtown in the past year compared to 2-3 years ago.

- ✓ In the past year, half (50 percent) of current users reported no change in frequency of non-work trips to Downtown as compared to 2-3 years ago.
- ✓ In the past year, 30 percent of current users reported a decline in non-work trip frequency to Downtown St. Louis. The share of users reporting a decline in use was 50 percent greater than the share of users reporting an increase in use.
- ✓ The average number of non-work Downtown trips among those who reported curtailed use was 15—very close to the average annual usage frequency for all current users.

CHANGE IN FREQUENCY OF DOWNTOWN VISITS IN PAST YEAR COMPARED TO 2-3 YEARS AGO		
	PERCENT OF CURRENT USERS	**AVERAGE TRIPS PAST YEAR**
Increased	20%	51 X
Decreased	30%	15 X
Unchanged	50%	17 X

CHANGE IN FREQUENCY OF DOWNTOWN USE BY AGE GROUP			
(READ ACROSS)	**INCREASED**	**DECREASED**	**UNCHANGED**
18 to 24	***44%***	24%	32%
25 to 34	***29%***	34%	37%
35 to 44	19%	31%	50%
45 to 54	20%	23%	57%
55 to 64	18%	22%	60%
65+	10%	40%	50%

CHANGE IN FREQUENCY OF DOWNTOWN USE BY INCOME GROUP			
(READ ACROSS)	**INCREASED**	**DECREASED**	**UNCHANGED**
Under $20,000	14%	63%	23%
$20,000 to $39,999	16%	30%	54%
$40,000 to $59,999	***30%***	49%	21%
$60,000 to $79,999	19%	27%	54%
$80,000 to $99,999	***26%***	19%	55%
$100,000 to $149,999	***37%***	23%	40%
$150,000+	***28%***	10%	62%

Current users most likely to have increased their use of Downtown in the past year were 18 to 34 year olds and more generally more affluent households.

USE OF METROLINK ON NON-WORK VISITS

Metrolink light rail is a transit option for some Downtown users based upon where they live within the metropolitan area.

- ✓ In the past year, half (47 percent) of current users reported at least one non-work visit to Downtown via Metrolink.
- ✓ On average, Metrolink was used 2.5 times in the last year for non-work trips. This is the equivalent of 13 percent of non-work visits to Downtown St. Louis.

NUMBER OF NON-WORK VISITS TO DOWNTOWN VIA METROLINK	
	N=562 CURRENT USERS
0	53%
1 to 5 trips	34%
6 to 10 trips	5%
11 to 20 trips	5%
21+ trips	2%
Average	2.5 X

STRATEGIC ASSESSMENT

The data gathered can be used to evaluate the effectiveness of the public and private sector initiatives to enhance the public perception of Downtown St. Louis as "clean, safe, and fun place to visit" through efforts focusing on:

1) Cleanliness of public areas
2) Variety of exciting and fun things to do
3) Safety (comfort during the day and at night)
4) Economic development (offering of dining and shopping options)

PERCEPTUAL RATINGS OF KEY ASPECTS OF DOWNTOWN ST. LOUIS (1=DOES NOT DESCRIBE DOWNTOWN…5=DESCRIBES DOWNTOWN VERY WELL)					
	1	2	3	4	5
Exciting and full of fun things to do	4%	16%	39%	24%	16%
Good selection of restaurants and dining options	2%	11%	28%	34%	26%
Good selection of unique stores and shopping options	12%	39%	32%	16%	9%
Clean and well-maintained public spaces	7%	18%	40%	24%	11%
Good place to take out-of-town guests	3%	6%	22%	38%	31%
Safe during the day	2%	4%	17%	44%	34%
Safe at night	17%	27%	33%	19%	5%
Easy to find way around	8%	13%	28%	30%	22%
Easily accessible by car	3%	11%	24%	31%	31%
Sufficient supply of well-located parking spaces	16%	27%	33%	17%	8%
Pleasant, walkable urban environment	5%	21%	38%	25%	11%

The perceptual ratings presented here are benchmarks for measuring progress in the future:

- ✓ The aspect of Downtown that received the largest share of high agreement ratings was "safe during the day (78 percent). While this is a very significant accomplishment, the data suggests additional effort is needed to positively impact perceptions of Downtown as being safe at night.

- ✓ Whereas 60 percent of current patrons registered very high agreement with Downtown having a good offering of restaurants and dining options, only 25 percent registered high agreement that Downtown has a good offering of unique stores and shopping options. Closing this gap is one of the on-going initiatives undertaken by the Partnership for Downtown St. Louis.

- ✓ Of concern, only 35 percent of Downtown's patrons feel Downtown St. Louis has "clean, well-maintained public areas."

The data, while generally positive, suggests opportunities to improve public perceptions of several aspects of Downtown St. Louis. These ratings can serve as benchmarks for measuring progress.

PERCEPTUAL AND ATTITUDINAL RATINGS

Downtown's current users were asked to use a scale from 1 to 5 (lowest to highest) to signal their agreement with perceptions and attitudes about Downtown St. Louis.

- ✓ Downtown's current users give it the highest perceptual ratings for safety during the day, being a good place to take out-of-town visitors, easy access by car, and good selection of restaurants and dining options.

- ✓ Downtown's lowest perceptual ratings are for supply of well-located parking spaces and safety at night.

MEAN PERCEPTUAL RATINGS (1 TO 5 SCALE)	
	N=562 2008
Safe during the day	4.0
Good place to take out-of-town guests	3.9
Easily accessible by car	3.8
Good selection of restaurants and dining options	3.7
Easy to find your way around	3.5
Exciting and full of fun things to do	3.3
Pleasant, walkable urban environment	3.2
Clean, well-maintained public spaces	3.1
A good selection of unique stores and shopping options	2.8
Sufficient supply of well-located parking spaces	2.7
Safe at night	2.7

- ✓ The highest attitudinal score was given to the statement "The revitalization of Downtown St. Louis is important to the economic success of the entire region."

- ✓ The lowest attitudinal score was given to the statement "Downtown St. Louis would be a good place for me to live."

MEAN ATTITUDE SCORES (1 TO 5 SCALE)	
	N=562 2008
Downtown revitalization is important to regional economic success	4.3
Downtown is more attractive/inviting now than 2-3 years ago	3.7
Downtown would be a good place to live (not for me)	3.4
Downtown is region's most important business/employment center	3.3
Downtown would be a good place to work	3.3
Downtown would be a good place for me to live	2.0

Average scores on ratings are presented in the following tables for key user segments:

- 25 to 44 year olds and 45 to 64 year olds
- Low/medium/high frequency users
- Users by household income

The data suggests few significant age-related differences in perception; however, there appear to be some differences in perception based upon frequency of Downtown use and household income.

- Higher-frequency Downtown users are more likely to perceive Downtown as "safe during the day" than low-frequency patrons. High-frequency patrons are also more likely to perceive Downtown St. Louis as a "good place to live" both for self and others and a "good place to work" than low-frequency patrons.

MEAN PERCEPTUAL RATINGS (1 TO 5 SCALE)						
	ALL USERS	**25-44**	**45-64**	**1-6 x**	**7-16 x**	**17+ x**
Safe during the day	4.0	4.1	4.0	3.9	4.1	4.3
Good place to take out-of-town guests	3.9	3.9	3.9	3.9	3.8	4.0
Easily accessible by car	3.8	3.8	3.8	3.6	3.7	3.9
Good selection of restaurants and dining options	3.7	3.8	3.8	3.8	3.8	3.8
Easy to find your way around	3.5	3.4	3.6	3.4	3.5	3.6
Exciting and full of fun things to do	3.3	3.4	3.3	3.3	3.4	3.4
Pleasant, walkable urban environment	3.2	3.2	3.2	3.2	3.2	3.3
Clean, well-maintained public spaces	3.1	3.1	3.3	3.3	3.1	3.1
A good selection of unique stores and shopping options	2.8	3.1	3.0	3.3	3.0	2.9
Sufficient supply of well-located parking spaces	2.7	2.8	2.7	2.9	2.8	2.8
Safe at night	2.7	2.8	2.8	2.8	2.7	3.0

MEAN PERCEPTUAL RATINGS (1 TO 5 SCALE)					
	ALL USERS	**LT $40K**	**$40-$60K**	**$60-$80K**	**$80K+**
Safe during the day	4.0	4.2	4.2	3.9	4.1
Good place to take out-of-town guests	3.9	4.1	4.1	3.8	3.8
Easily accessible by car	3.8	3.9	3.8	3.7	3.8
Good selection of restaurants and dining options	3.7	4.0	3.9	3.7	3.8
Easy to find your way around	3.5	3.6	3.6	3.3	3.5
Exciting and full of fun things to do	3.3	3.7	3.5	3.3	3.3
Pleasant, walkable urban environment	3.2	3.5	3.2	3.2	3.2
Clean, well-maintained public spaces	3.1	3.6	3.2	3.1	3.1
A good selection of unique stores and shopping options	2.8	3.5	3.2	2.9	2.9
Sufficient supply of well-located parking spaces	2.7	2.9	2.7	2.8	2.9
Safe at night	2.7	2.9	2.9	2.8	2.8

- Higher-income patrons are less likely to perceive Downtown as having "a good supply of unique stores and shopping options" than lower income patrons.

MEAN PERCEPTUAL RATINGS (1 TO 5 SCALE)						
	ALL USERS	**25-44**	**45-64**	**1-6 x**	**7-16 x**	**17+ x**
Downtown revitalization is important to regional economic success	4.3	4.4	4.4	4.3	4.3	4.5
Downtown is more attractive/inviting now than 2-3 years ago	3.7	3.7	3.8	3.7	3.8	3.8
Downtown would be a good place to live (not for me)	3.4	3.4	3.3	3.1	3.3	3.7
Downtown is region's most important business center	3.3	3.3	3.3	3.3	3.3	3.5
Downtown would be a good place to work	3.3	3.3	3.2	2.9	3.3	3.7
Downtown would be a good place for me to live	2.0	1.9	2.0	1.6	1.8	2.4

MEAN PERCEPTUAL RATINGS (1 TO 5 SCALE)					
	ALL USERS	**LT $40K**	**$40-$60K**	**$60-$80K**	**$80K+**
Downtown revitalization is important to regional economic success	4.3	4.3	4.4	4.3	4.5
Downtown is more attractive/inviting now than 2-3 years ago	3.7	3.9	3.7	3.7	3.8
Downtown would be a good place to live (not for me)	3.4	3.4	3.4	3.4	3.4
Downtown is region's most important business center	3.3	3.5	3.3	3.3	3.4
Downtown would be a good place to work	3.3	3.4	3.2	3.2	3.4
Downtown would be a good place for me to live	2.0	2.0	2.1	1.9	1.9

This data can serve as benchmark ratings for measuring progress with initiatives related to safety, signage, and marketing.

"LIKE" AND "DISLIKE" ABOUT DOWNTOWN

Downtown's users were asked to cite their top "like" and "dislike" about Downtown St. Louis. These responses provide insight into the way people use Downtown and may be powerful images in marketing campaigns geared toward increasing use of Downtown among current users.

- ✓ The "most liked" aspects of Downtown St. Louis are its sporting events and beautiful architecture/history.

"MOST LIKED" ASPECT OF DOWNTOWN ST. LOUIS	
	N=562 2008
Sporting events	25%
Beautiful architecture/historic place	18%
Entertainment/cultural events	9%
Restaurants	6%
Lots of things to do	5%
Sense of "urban excitement"	5%
Walkable/pedestrian-oriented	4%
Clubs and late night activities	3%
Shopping	2%
Clean/redeveloped place	2%
All other responses	20%

The following responses were included in "other responses" as "most liked" aspect of Downtown:

The Arch/Riverfront:	32 mentions
Washington Avenue:	7 mentions
Laclede's Landing:	7 mentions
Metrolink:	4 mentions
City skyline:	4 mentions
Gaming:	3 mentions
Central Library:	2 mentions
City Museum:	2 mentions
St. Louis Union Station:	2 mentions
Loft area:	2 mentions

Other open-ended comments included comments such as friendly, variety, diversity, and easy to get around.

✓ The "least liked" aspect of Downtown is its parking supply/convenience of parking.

"LEAST LIKED" ASPECT OF DOWNTOWN ST. LOUIS	
	N=562 2008
Not enough parking/parking too far from destination	16%
Traffic congestion inside Downtown	16%
Fear of crime/concern about safety	13%
Run down/dirty/ugly	8%
Parking meters	6%
Road closures and construction detours	5%
Not enough shopping/stores	4%
Panhandlers/homeless	3%
Hard to find way around	2%
Too far from home/inconvenient location	2%
One way street system	1%
Strict parking enforcement	1%
Not well lit at night	1%
Restaurants are too expensive/not family oriented	1%
All other responses	24%

The following responses were included in "other responses" as "least liked" aspect of Downtown:

Laclede's Landing:	11 mentions
Not much activity after 6:00:	9 mentions
Casinos:	8 mentions
Not enough to do:	7 mentions
Stadium/Ballpark Village:	6 mentions
Crowded:	4 mentions
Not enough family activities:	3 mentions
Menacing adjacent areas:	3 mentions
Not enough stores/shopping:	2 mentions

Other open-ended comments included comments such as "seedy/honky-tonk" and declining quality suggest value judgments are being made by some Downtown users.

SUGGESTED IMPROVEMENTS TO DOWNTOWN

Current Downtown users were asked to suggest improvements to Downtown that would lead to greater use of Downtown for non-work purposes.

- ✓ The MOST FREQUENTLY SUGGESTED IMPROVEMENT FOR Downtown was "add more stores/shopping options. "

SUGGESTED IMPROVEMENTS FOR GREATER DOWNTOWN USE	
More shopping (65 suggestions)	Enhanced cleanliness (14 mentions)
Safer (59 suggestions)	More activities at Gateway Park (10 suggestions)
More family/kid friendly (47 suggestions)	Continue urban revitalization (10 suggestions)
Easier parking (34 suggestions)	Better mass transit access (9 suggestions)
Cheaper/free parking (31 suggestions)	Fewer homeless/panhandlers/teens (7 suggestions)
More entertainment/events (23 mentions)	More pedestrian friendly (7 suggestions)
Build Ballpark Village (23 suggestions)	More lighting at night (6 suggestions)
More Metrolink service (19 suggestions)	Cheaper restaurants (5 suggestions)
Finish Hwy 40 construction (19 suggestions)	More nightlife (5 suggestions)
Easier movement in Downtown (16 suggestions)	Movie theater (3 suggestions)
More restaurants (16 suggestions)	Cheaper baseball/sports tickets (4 suggestions)
Riverfront improvements (15 suggestions)	More advertising about Downtown (3 suggestions)

PATRONAGE OF SELECTED DISTRICTS OUTSIDE OF DOWNTOWN ST. LOUIS

Survey respondents were asked how many times they had visited selected dining/shopping/entertainment districts outside of Downtown St. Louis. Results presented in the following table reflect all survey respondents (Downtown users and non-users).

- ✓ Incidence of non-work visits to each of these selected districts was approximately 80 percent. Incidence of non-work visitation by Downtown's current users was almost universal for each district.

- ✓ Average visit frequencies were very modest compared to average visit frequency of Downtown St. Louis by its users. The district with the highest average frequency of use was University City/The Loop with 2.5 visits in the past year.

NUMBER OF VISITS TO SELECTED DISTRICTS (PAST YEAR)		
	INCIDENCE	**AVERAGE FREQUENCY**
Soulard	81%	1.9 X
Lafayette Square	79%	1.3 X
South Grand	80%	1.6 X
Central West End	82%	2.0 X
Downtown Clayton	82%	2.1 X
University City/The Loop	81%	2.5 X
Grand Center/Midtown	80%	1.5 X

This data provides a reminder that there are multiple nodes near Downtown that offer some aspect of dining/shopping/entertainment in a manner that may be considered "competitive" with Downtown St. Louis. In many cases, patrons may perceive these districts to be easier or more convenient to use in terms of parking or they may perceive these areas to be safer and less intimidating than Downtown St. Louis.

REASONS FOR NOT VISITING DOWNTOWN ST. LOUIS IN PAST YEAR

Survey participants who had not visited Downtown in the past year were asked why they had not visited Downtown St. Louis.

- ✓ The predominant explanation for not visiting Downtown for any non-work purpose is "no reason to go Downtown." This catch-all explanation includes people who don't go Downtown because they can satisfy their shopping/dining/entertainment needs closer to home as well as people who are simply not interested in going Downtown to take advantage of its many offerings. This response category includes people who know what's going on in Downtown as well as those who are not aware of Downtown's events and offerings.

REASONS FOR NOT VISITING DOWNTOWN IN PAST YEAR	
Have no reason to go Downtown	74 mentions
Distance/Inconvenient	21 mentions
Too old	16 mentions
No interest in anything in Downtown	12 mentions
No time	9 mentions
Too expensive	9 mentions
Downtown is dangerous	8 mentions
No car	5 mentions
Ill/handicapped	4 mentions
Highway 40 construction	4 mentions
Too crowded	3 mentions
Traffic congestion	3 mentions
Parking is hard to find or expensive	2 mentions

DEMOGRAPHIC PROFILE OF DOWNTOWN USERS VS. NON-USERS

The following table presents demographic profiles of Downtown's non-work users and non-users.

- ✓ Non-users are older and less affluent than Downtown's users. Whereas there is no racial difference between users and non-users, females comprise a larger share of non-users than users.

DEMOGRAPHIC COMPARISON DOWNTOWN USERS VS. NON-USERS		
(READ DOWN)	**N=562 DOWNTOWN USERS**	**N=168 NON-USERS**
18 to 24	4%	4%
25 to 34	15%	5%
35 to 44	30%	13%
45 to 54	22%	11%
55 to 64	17%	15%
65+	12%	52%
Average	46.4 yrs	53.1 yrs
Less than $20,000	4%	27%
$20,000 to $39,999	15%	27%
$40,000 to $59,999	25%	19%
$60,000 to $79,999	23%	15%
$80,000 to $99,999	15%	6%
$100,000 to $149,999	13%	6%
$150,000+	6%	1%
Average	$75,610	$48,790
Caucasian	85%	81%
African American	12%	14%
Male	41%	35%
Female	59%	65%

This perspective of Downtown users as more affluent than non-users may contradict a stereotype and can be useful in defining the potential for additional retail development in Downtown St. Louis.

APPENDIX

THE PARTNERSHIP FOR DOWNTOWN ST. LOUIS USAGE AND PERCEPTION STUDY (10/08)

HELLO, my name is _____ with Pragmatic Research, and we're doing a brief survey today of residents of the St. Louis area. May I please speak to the person in your household who is the YOUNGEST adult who is at least 18 years old?

Q1 **Do you live in St. Louis City or one of the following counties? [READ LIST.. SELECT ONE.]**

St. Louis City	1	CONTINUE TO Q. 2	*Madison County, IL*	6	SKIP TO Q. 3
St. Louis County	2	SKIP TO Q. 3	*St. Clair County, IL*	7	SKIP TO Q. 3
St. Charles County	3	SKIP TO Q. 3	*Monroe County, IL*	8	SKIP TO Q. 3
Jefferson County	4	SKIP TO Q. 3	*Other [TERMINATE.]*	9	
Franklin County	5	SKIP TO Q. 3			

READ TO ALL RESPONDENTS: Downtown St. Louis is defined the area EAST of Jefferson Avenue, WEST of the Mississippi River, NORTH of Chouteau and SOUTH of Cass Avenue. This area includes the Central Business District, the Dome and convention center, the government center and Gateway Mall, the Cupples Station and Ballpark District, Washington Avenue, and the Riverfront.

Q2 **Do you live within Downtown St. Louis?**

Yes	1	TERMINATE	*No*	2	CONTINUE TO Q. 3

Q3 **Do you work in Downtown St. Louis?**

Yes	1	CONTINUE TO Q. 4	*No*	2	SKIP TO Q. 5

Q4 **How long have you worked in Downtown St. Louis?**

Less than 1 year	1	*5-10 years*	4
1-2 years	2	*10+ years*	5
2-5 years	3		

My first few questions are about any visits you may have made to Downtown St. Louis in the past 12 months.

Q5 **Have you been to Downtown St. Louis for work or any other purpose in the past 12 months?**

Yes	1	SKIP TO Q. 9	*No*	2	CONTINUE TO Q. 6

Q6 **About how long ago was your last NON-WORK visit to Downtown St. Louis?**

More than 1 year ago but less than 2 years ago	1	CONTINUE TO Q. 7	*3 to 5 years ago*	3	CONTINUE TO Q. 7
2 to 3 years ago	2	CONTINUE TO Q. 7	*More than 5 years ago*	4	CONTINUE TO Q. 7
			Have never been	5	SKIP TO Q. 8

Q7 Why have you not visited Downtown St. Louis more recently than (response from Q. 6)? [PROBE. RECORD VERBATIM.]

SKIP TO Q. 30

Q8 Why have you NEVER visited Downtown St. Louis? [PROBE. RECORD VERBATIM.]

SKIP TO Q. 30

Now I'd like to ask you about NON-WORK visits to Downtown St. Louis. In the past year, how many times have you been to Downtown St. Louis for the following reasons.....

Q9 For fine dining in restaurants with entrees generally priced at $20 or more:

Q10 For casual dining in any restaurants or pubs:

Q11 To go to any music clubs, nightclubs, or other place for evening or late-night entertainment:

Q12 To browse or shop at Macy's:

Q13 To browse or shop at any other stores on streets such as Washington Avenue or in St. Louis Union Station:

Q14 For any professional or college sporting event at Busch Stadium, the Dome, or Scottrade Center:

Q15 For any free outdoor events including concerts, parades, and festivals including those held on the Riverfront and at Gateway Mall:

Q16 For any concert or family event at Scottrade Center or any non-sporting event at America's Center including the Home Show or Boat Show:

Q17 For any gaming at Lumiere Place or The President:

Q18 To any city, state, or federal government offices:

Q19 Go to Downtown for any other reasons not mentioned including visits to the central library or a Downtown church:

Q20 In the past year, how many times have you visited the following Downtown destinations or districts:

The Gateway Arch

City Museum

St. Louis Union Station

Washington Avenue

Laclede's Landing EXCLUDING GAMING TRIPS

Q21 Over the past year, has your frequency of visiting Downtown St. Louis for non-work purposes increased, decreased, or remained unchanged compared to 2-3 years ago?

Increased 1
Decreased 2
Stayed the same 3
Don't know 4

Q22 In the past year, how many times have you used METROLINK to visit Downtown for a non-work activity?

Q23 What ONE feature or aspect of Downtown St. Louis do you ***LIKE BEST***? [DO NOT READ LIST. PROBE. ACCEPT ONE RESPONSE.]

Restaurants 01
Clubs and late-night activities 02
Shopping 03
Lots of things to do 04
Entertainment/cultural events 05
Sense of "urban excitement"/feels like a city 06
Sporting events 07
Beautiful architecture/historic place 08
Walkable area/pedestrian oriented 09
Clean/redeveloped place 10
Nothing 11
Other (specify in next question) 12

Q24 SPECIFY "other" here. [PROBE. RECORD VERBATIM.]

Q25 **What ONE feature or aspect of Downtown St. Louis do you *LIKE LEAST*? [DO NOT READ LIST. PROBE. ACCEPT ONE RESPONSE.]**

- *Traffic congestion inside Downtown* ☐ 01
- *Road closures and detours caused by construction activity* ☐ 02
- *Feel unsafe/concerned about crime* ☐ 03
- *Not enough parking/park too far from destination* ☐ 04
- *Don't want to pay for parking/meters are a hassle* ☐ 05
- *Hard to find your way around* ☐ 06
- *It's too run-down/dirty/ugly* ☐ 07
- *Panhandlers/homeless people hanging around* ☐ 08
- *One way streets* ☐ 09
- *Strict parking enforcement* ☐ 10
- *Too far from home/inconveniently located* ☐ 11
- *Not well lit at night* ☐ 12
- *Restaurants are too expensive* ☐ 13
- *Restuarants are not family oriented* ☐ 14
- *Not enough stores/shopping* ☐ 15
- *Nothing* ☐ 16
- *Other (specify in next question)* ☐ 17

Q26 **SPECIFY "other" here. [PROBE. RECORD VERBATIM.]**

Q27 **What improvements, changes, or additions to Downtown St. Louis would cause you to visit Downtown St. Louis more often? [PROBE. RECORD VERBATIM.]**

I'm going to read a series of descriptions of Downtown St. Louis. Please rate how well you think the description describes Downtown St. Louis using a scale of 1 to 5. 1 means that the description does NOT AT ALL describe Downtown St. Louis and 5 means the description describes Downtown St. Louis VERY WELL. You can use any number in between 1 and 5.

Q28 **On a 1 to 5 scale, would you say Downtown St. Louis is......**

	1	*2*	*3*	*4*	*5*	*DON'T KNOW*
Exciting and full of fun things to do	☐	☐	☐	☐	☐	☐
Offers a good selection of restaurants and dining options	☐	☐	☐	☐	☐	☐
Offers a good selection of unique stores and shopping options	☐	☐	☐	☐	☐	☐
Has clean and well-maintained public spaces	☐	☐	☐	☐	☐	☐
Is a good place to bring out-of-town guests	☐	☐	☐	☐	☐	☐
Is safe during the day	☐	☐	☐	☐	☐	☐
Is safe at night	☐	☐	☐	☐	☐	☐
Is easy to find your way around	☐	☐	☐	☐	☐	☐
Is easily accessible by car	☐	☐	☐	☐	☐	☐
Has a sufficient supply of well-located parking spaces	☐	☐	☐	☐	☐	☐
Offers a pleasant, walkable urban environment	☐	☐	☐	☐	☐	☐

Q29 **Now I am going to read a series of statements about Downtown St. Louis. Using a scale of 1 to 5, please tell me how much you agree or disagree with each statement. Use 1 to indicate that you COMPLETELY DISAGREE and 5 to indicate that you AGREE COMPLETELY with a statement.**

	1	*2*	*3*	*4*	*5*	*DON'T KNOW*
Downtown St. Louis is more attractive and inviting than it was 2-3 years ago	☐	☐	☐	☐	☐	☐
The revitalization of Downtown St. Louis is important to the economic success of the entire region	☐	☐	☐	☐	☐	☐
Downtown St. Louis is the most important business and employment center for the region	☐	☐	☐	☐	☐	☐
Downtown St. Louis would be a good place to live although not necessarily for me	☐	☐	☐	☐	☐	☐
Downtown St. Louis would be a good place for me to live	☐	☐	☐	☐	☐	☐
Downtown St. Louis would be a good place to work	☐	☐	☐	☐	☐	☐

Q30 **THE NEXT FEW QUESTIONS ARE ABOUT NON-WORK VISITS TO AREAS OUTSIDE OF DOWNTOWN. In the past year, how many times have you visited each of the following areas for non-work reasons:**

SOULARD .... ☐

LAFAYETTE SQUARE .... ☐

SOUTH GRAND .... ☐

CENTRAL WEST END .... ☐

THE DOWNTOWN AREA OF CLAYTON .... ☐

UNIVERSITY CITY/THE LOOP .... ☐

GRAND CENTER/MIDTOWN .... ☐

Q31 **What is your home Zip code?**

☐

Q32 **What is your work Zip code**

☐

Q33 **Please stop me when I say your age group. [SLOWLY READ CODES 1 THROUGH 6. DO NOT VOLUNTEER "REFUSED."]**

18 to 24 .... ☐ 1

25 to 34 .... ☐ 2

35 to 44 .... ☐ 3

45 to 54 .... ☐ 4

55 to 64 .... ☐ 5

65+ .... ☐ 6

Refused .... ☐ 7

Q34 **Please tell me about your household.**

How many adults age 18+ INCLUDING YOURSELF live in your household	
How many children up to age 5	
How many children ages 6 to 12	
How many children ages 13 to 17	

Q35 **What is your ethnic background...are you....? [SLOWLY READ CODES 1 THROUGH 5. DO NOT VOLUNTEER "REFUSED."]**

Caucasian	☐1	*Asian or Pacific Islander*	☐4
African American	☐2	*Other ethnic or racial group*	☐5
Hispanic or Latino	☐3	*Refused*	☐6

Q36 **Lastly, please stop me when I read the group that includes your household's TOTAL income per year BEFORE TAXES. [SLOWLY READ CODES 1 THROUGH 7. DO NOT VOLUNTEER "REFUSED."]**

$20,000 or less	☐1	*More than $100,000 up to $150,000*	☐6
More than $20,000 up to $40,000	☐2	*More than $150,000 up to $200,000*	☐7
More than $40,000 up to $60,000	☐3	*More than $200,000*	☐8
More than $60,000 up to $80,000	☐4	*Refused*	☐9
More than $80,000 up to $100,000	☐5		

Q37 **RECORD gender of respondent:**

Male	☐1	*Female*	☐2

Q38 **If you would like to receive occasional updates on events and activities in Downtown St. Louis, I will gladly give your e-mail address to the Partnership for Downtown St. Louis:**

THANK YOU FOR YOUR TIME!

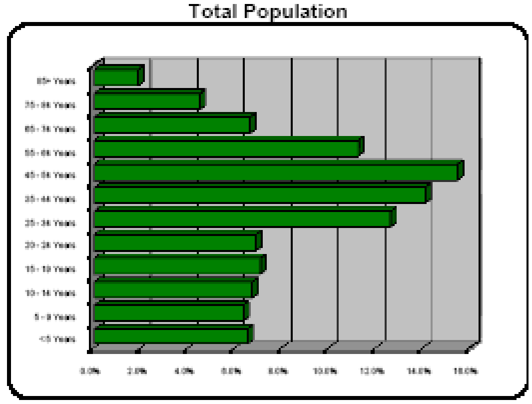
Population	2,579,450	
In Households	2,531,603	98.1%
In Families	2,123,902	82.3%
In Non-family Households	407,701	15.8%
In Group Quarters	47,847	1.9%
Race: White	1,966,186	76.2%
Black	499,062	19.3%
American Indian	6,955	0.3%
Asian	55,911	2.2%
Pacific Islander	613	0.0%
Other/Multi-Racial	50,703	2.0%
Hispanic Population	51,866	2.0%
Labor Force: Pop, 16+ Years	2,036,868	
In Armed Forces	6,520	0.3%
Employed	1,302,225	63.9%
Unemployed	99,964	4.9%
Not In Labor Force	628,159	30.8%
Education: Pop, 25+ Years	1,712,705	
No HS Diploma	179,451	10.5%
HS Graduate	476,270	27.8%
College, No Degree	391,843	22.9%
Associate Degree	136,862	8.0%
College Degree	331,666	19.4%
Graduate/Professional Degree	196,613	11.5%
Households	1,006,945	
Families	658,769	65.4%
Non-Families	348,176	34.6%
Average Size: Household	2.5	
Family	3.2	
Non-Family	1.2	
Total Housing Units	1,121,735	
Vacant	114,790	10.2%
Owned	730,639	65.1%
Rented	276,306	24.6%
Persons In Households: 1	291,577	29.0%
2	306,521	30.4%
3-4	309,514	30.7%
5+	99,333	9.9%
Vehicles Available	1,842,774	
Average Vehicles/HH	1.8	
Vehicles Per Household: 0	62,493	6.2%
1	339,925	33.8%
2	390,777	38.8%
3+	213,750	21.2%

Total Aggregate Income	$68,266,408,900	
Per Capita Income	$26,465	
Household Income:		
< $10,000	72,022	7.2%
$10,000 - $14,999	39,690	3.9%
$15,000 - $19,999	46,651	4.6%
$20,000 - $24,999	51,203	5.1%
$25,000 - $29,999	53,404	5.3%
$30,000 - $34,999	50,213	5.0%
$35,000 - $39,999	48,148	4.8%
$40,000 - $49,999	97,086	9.6%
$50,000 - $59,999	93,399	9.3%
$60,000 - $74,999	112,300	11.2%
$75,000 - $99,999	140,566	14.0%
$100,000 - $124,999	80,294	8.0%
$125,000 - $149,999	43,725	4.3%
$150,000 - $199,999	38,230	3.8%
$200,000 - $249,999	12,583	1.2%
$250,000+	27,431	2.7%
Aggr Household Income	$66,422,039,262	
Aggr Family Income	$52,712,472,063	
Aggr Non-Family Income	$13,709,095,577	
Avg Household Income	$65,964	
Avg Family Income	$80,017	
Avg Non-Family Income	$39,374	
Median Household Income	$55,115	
Median Family Income	$68,315	
Median Non-Family Income	$34,254	
Disposable Household Income		
< $10,000	78,446	7.8%
$10,000 - $14,999	39,213	3.9%
$15,000 - $19,999	53,790	5.3%
$20,000 - $24,999	64,164	6.4%
$25,000 - $29,999	65,928	6.5%
$30,000 - $34,999	60,655	6.0%
$35,000 - $39,999	65,069	6.5%
$40,000 - $49,999	127,711	12.7%
$50,000 - $59,999	103,991	10.3%
$60,000 - $74,999	130,545	13.0%
$75,000 - $99,999	105,960	10.5%
$100,000 - $124,999	47,160	4.7%
$125,000 - $149,999	23,074	2.3%
$150,000 - $199,999	16,574	1.6%
$200,000 - $249,999	6,438	0.6%
$250,000+	18,227	1.8%
Aggr Disposable Income	$56,576,406,691	
Avg Disposable Income	$56,186	
Median Disposable Income	$46,088	

Source: 2007 Scan/US Estimates

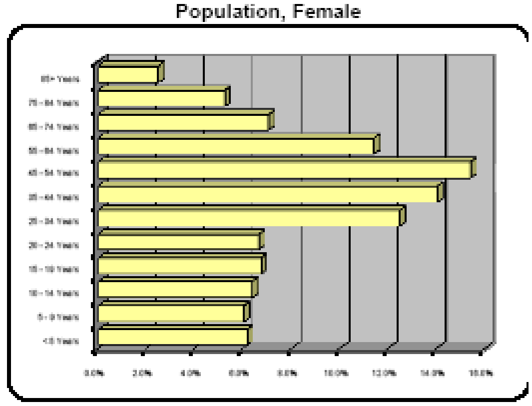
Total Population	2,579,450	
< 5 Years	168,320	6.5%
5 - 9 Years	163,923	6.4%
10 - 14 Years	173,840	6.7%
15 - 19 Years	182,832	7.1%
20 - 24 Years	177,830	6.9%
25 - 34 Years	325,249	12.6%
35 - 44 Years	363,189	14.1%
45 - 54 Years	398,848	15.5%
55 - 64 Years	290,061	11.2%
65 - 74 Years	171,322	6.6%
75 - 84 Years	115,780	4.5%
85+ Years	48,256	1.9%
Median Age	38.0	

Total Population



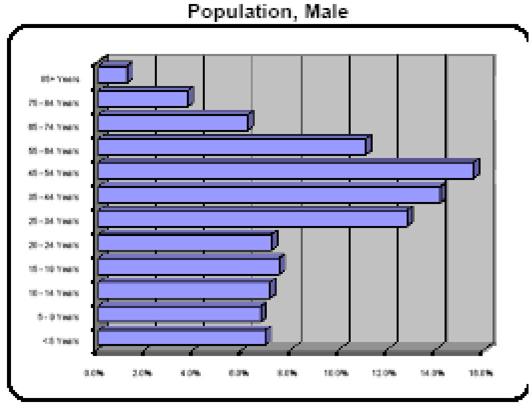
Population, Female	1,334,332	51.7%
< 5 Years	82,305	6.2%
5 - 9 Years	80,302	6.0%
10 - 14 Years	85,092	6.4%
15 - 19 Years	89,702	6.7%
20 - 24 Years	88,531	6.6%
25 - 34 Years	166,313	12.5%
35 - 44 Years	186,985	14.0%
45 - 54 Years	205,541	15.4%
55 - 64 Years	152,267	11.4%
65 - 74 Years	94,177	7.1%
75 - 84 Years	69,713	5.2%
85+ Years	33,404	2.5%
Median Age/Female	39.2	

Population, Female



Population, Male	1,245,118	48.3%
< 5 Years	86,015	6.9%
5 - 9 Years	83,621	6.7%
10 - 14 Years	88,748	7.1%
15 - 19 Years	93,130	7.5%
20 - 24 Years	89,299	7.2%
25 - 34 Years	158,936	12.8%
35 - 44 Years	176,204	14.2%
45 - 54 Years	193,307	15.5%
55 - 64 Years	137,794	11.1%
65 - 74 Years	77,145	6.2%
75 - 84 Years	46,067	3.7%
85+ Years	14,852	1.2%
Median Age/Male	36.5	

Population, Male



Source: 2007 Scan/US Estimates

H. BLOUNT HUNTER

Blount Hunter is a 1977 graduate of the University of Virginia with concentrations in economics and sociology. He began his retail research career in 1977 and founded his advisory firm in 1996 after twelve years as Senior Analyst in the Research & Site Strategy Department of The Rouse Company. Over his 29 year career in real estate analysis, Hunter has performed feasibility studies, assessed sales potential and supportable retail square footage, created Downtown trade area delineations and patron profiles, and provided leasing support for shopping centers and urban districts in more than 40 states, Canada, and Puerto Rico.

Hunter is currently a member of the Board of Directors of the International Downtown Association. He was a juror for IDA's 2000 Achievement Awards and has participated in several Urban Land Institute Advisory Panels. He authored a chapter on "Main Street Retail Market Analysis" in a ULI textbook published in June, 2001 and in early 2009 is working on an updated chapter for the second printing of the text. Hunter authored a chapter on retail fundamentals in International Downtown Association's 2006 text "Making Business Districts Work." Hunter's most comprehensive publication, Developing Successful Retail in Underserved and Secondary Markets, was published by International Council of Shopping Centers and National Association of Counties in 2006.

H. Blount Hunter Retail & Real Estate Research Company has conducted Downtown Perception and Use studies in a variety of cities including Norfolk (VA), Albany (NY), Orlando (FL), Baton Rouge (LA), Charlotte (NC), Delray Beach (FL), Long Beach (CA), West Palm Beach (FL), Jackson (MI), Frederick (MD), Knoxville (TN), and Greensboro (NC). Several clients have engaged the Company to repeat the market measurement to create a time series to measure changes in perception and use of Downtown. While "reach" and "frequency" results are never identical, the survey methodology identifies how well each Downtown area is serving its community as a mixed-use destination for a variety of activities. Survey results have been used as the basis for marketing campaigns, BID performance measurement, and in retail development assessments.

H. Blount Hunter Retail & Real Estate Research Company is headquartered in Norfolk, VA. Visit www.hbhresearch.com for more details.