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East Carson Street Business District Strategy

October, 2018

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Executive Summary

Fourth Economy Consulting partnered with TST Productions to conduct a business district planning and capacity building analysis to support the East Carson Business District Strategy. The outcome of this effort is a business district plan for East Carson Street, which is located in the City of Pittsburgh's South Side neighborhood.

The East Carson Street corridor has long been one of Pittsburgh's most well-known neighborhood business districts. It was designated in 1993 as a National Register Historic District, and is notable as the longest collection of intact Victorian commercial buildings in the country. East Carson Street is also a City of Pittsburgh designated historic district.

This report was funded by the Urban Redevelopment Authority of Pittsburgh (URA) and Pittsburgh City Councilman Bruce Kraus. The process was guided by a project team, which consisted of representatives from the South Side Community Council, South Side Chamber of Commerce, South Side Development Review Committee, South Side Neighborhood Plan Committee, the URA, the Department of City Planning, the Mayor's Office, the Nighttime Economy Office, and Councilman Kraus' office.Throughout the process, the project team ensured that the business district plan was well informed by engaging a variety of stakeholders, including residents, local business owners, employees of local businesses, and visitors to the neighborhood. These community engagement efforts were supplemented with a market analysis and nighttime economy analysis to provide a comprehensive business district plan for the Urban Redevelopment Authority (URA) and other project partners.

Through the community engagement and data analysis components of the project, recommendations were developed to support the East Carson Street Business District Strategy. These recommendations align with the four components of the Main Street transformation strategies. These components are economic vitality, design, promotion, and organization. The recommendations in this report and the three-year strategy are framed around these four components.

Economic Vitality

Informed by the community vision and market analysis, the economic vitality recommendation focuses on the ideal business mix for East Carson Street, considering current businesses and desired ones. Some of the businesses indicated through this recommendation align nicely with the current market. These businesses include specialty stores, unique dining options, and fitness and wellness businesses. However, other businesses highlighted through the process, such as additional stores with fresh food options and home furnishing stores, will be more difficult for East Carson Street to attract and sustain.

An additional area of focus of the economic vitality recommendations is business incentives and supports. These incentives and supports can be used to assist businesses and property owners already located on the corridor, those that are making location decisions, and owners of underutilized property.

Design

A commercial corridor's design, or the way the corridor looks and feels to those visiting or travelling through, has a tremendous impact on initial perceptions, lasting impressions, and ultimately business success. Successful commercial corridors are welcoming, well-maintained, and focused on the experience of being there.

During a public meeting that was hosted as part of this process, stakeholders were asked to consider the design principles of East Carson Street. This group developed the following four themes related to design: green, clean, safe, and welcoming. Green included items such as better connection to riverfront trails and more green space. Clean included cleaner streets and sidewalks and improved recycling systems. The safe design principle highlighted code enforcement and enhanced lighting on East Carson Street. Lastly, the principle of welcoming design included lighting up vacant storefront windows and increasing public transportation and ride sharing.

Promotion

The promotion recommendation relates to the corridor's ability to increase awareness of East Carson Street and ensure that the public--residents and visitors alike--has an accurate perception of the area. Among other strategies identified through the process, community members indicated that developing a public relations campaign, creating a cultural district in the South Side and hosting more seasonal events would support the promotion recommendation.

Organization

The organization principle and recommendation applies to stakeholders' ability to coordinate and arrange themselves in a way that is supportive of these recommendations. There are organizations that already exist that can continue to move this work forward, but in some cases new formations of stakeholders may be necessary. This recommendation highlights the opportunities that exist with the Chamber of Commerce and, working with this body to support a full-time staff member, leveraging the excitement of local residents in an organized manner, and ultimately growing into a Main Street Program.

Recommendations in these four areas were used to develop a three-year strategy with goals for each year that align with the four principles above.

Introduction

The Urban Redevelopment Authority (URA) contracted with Fourth Economy Consulting, in partnership with TST Productions, to conduct a business district planning and capacity building analysis to support the East Carson Business District Strategy. The project focused on the development of a business district plan for East Carson Street and considered how this business district supports neighborhood residents and visitors to the area. To inform this project, data was collected through a variety of manners to create a community-driven and action-oriented plan for strengthening the South Side's historic East Carson Street corridor. During this process, the project team collected data through the following activities:

- Community and stakeholder engagement, including attending community and organizational meetings, surveys, intercept and phone interviews, and individual meetings.
- Participating in South Side Planning Forum meetings.
- Producing a market analysis that incorporates both anecdotal and data-based information about resident, business owner, worker, and patron preferences.
- Analyzing the nighttime economy and undertaking a policy review.

This report includes the results from the community engagement and analytic activities, which will support a three- to five-year business district strategy for the East Carson Street business district.

Community Engagement

To ensure that this process was driven by the community, the project team sought to engage a diverse set of stakeholders familiar with East Carson Street throughout the project. This group of stakeholders included business owners, residents, employees, and visitors to the area.

The community engagement process included intercept interviews, which were conducted on East Carson Street, phone interviews, a resident focus group, and numerous conversations with business owners. Community engagement efforts culminated in a final public meeting, during which an interactive session was held to source strategies that stakeholders felt were high-priority and achievable with the right support.

Several themes about the East Carson Business District were shared through the community engagement process. These themes are detailed below, and the strategies developed by stakeholders at the public meeting are detailed near the end of this report.

- **Stakeholders consider East Carson Street to be eclectic**. Residents and business owners shared that East Carson Street seems to be influenced by a broad and diverse set of ideas and styles. This also aligns with how residents use the business district, noting that they visit East Carson Street numerous times during the week for a variety of reasons, including purchasing basic goods, visiting specialty shops, dining, and going out for the evening.

- **East Carson Street's walkability is an appreciated asset**. In almost all the interviews with stakeholders, they highlighted that one of East Carson Street's biggest strengths was how walkable it is. Many of the residents who visited East Carson Street said they walked there, especially if they lived in the Flats. This walkability also makes the area attractive to business owners, since the increased foot traffic encourages walk-in business.

- **Parking is an issue that the community is passionate about**. Residents and business owners are concerned about the lack of parking in the community. There was not a consensus on what should be done to address this issue, but most individuals engaged in this process noted this as a problem that should be addressed.

- **Some stakeholders feel that East Carson Street is too dirty**. This was shared as an issue that contributes to a negative perception about the area. Additionally, the lack of cleanliness on East Carson Street was identified as a deterrent for wanting to spend more time there. , When asked how they would describe East Carson Street, many stakeholders' answer was "dirty".

- **There is interest in bringing in more quality restaurants and specialty shops**. Many of the stakeholders surveyed said that more quality dining options would lead them to spend more time on East Carson Street. They also emphasized the need for more specialty shops, such as a butcher or a place to purchase small gifts. People acknowledged that there were nearby places that provided these options, such as Southside Works, but noted that many of the stores have closed. Given this, the respondents feel that more specialty shops and quality dining options on East Carson Street would lead to more people shopping there, especially the residents.

- **East Carson Street has a negative perception due to excessive alcohol consumption**. A common perception region-wide is that East Carson Street is the "Jersey Shore" of Pittsburgh. For some businesses, this can be a good thing, but it can lead to lower customer traffic for others. Many residents and non-food-and-drink businesses do not appreciate this perception, as they feel it negatively impacts their neighborhood and businesses on East Carson Street. While the perception of East Carson Street as an alcohol-based environment on weekend nights is realistic, it does not apply to the corridor at other times. Some noted that the community should work together to change how people consider East Carson Street.

In addition to the theme shared above, those residents, business owners, employees, and visitors that were engaged as part of this process also shared ideas on how to strengthen East Carson Street.

- **Create a public relations/advertising campaign for the South Side**. Individuals feel strongly that a public relations campaign, showcasing a variety of things the South Side has to offer, beyond bars, will give people new reasons to come to the South Side and attract more visitors to the area.

- **Consider making the South Side a cultural district.** It was shared that the cultural institutions in the South Side could come together to create a committee that would focus on making it into a cultural district. East Carson Street has a significant number of cultural attractions, and coordinating these organizations in this way could lead to more economic activity in the area.

- **Establish a music/entertainment district with live music venues and nightlife**. This is similar to the idea of establishing East Carson Street as a cultural district. East Carson Street has considerable assets that would facilitate a music/entertainment district, and residents suggested building on these assets to provide more diverse entertainment choices, like jazz clubs and other quality music venues.

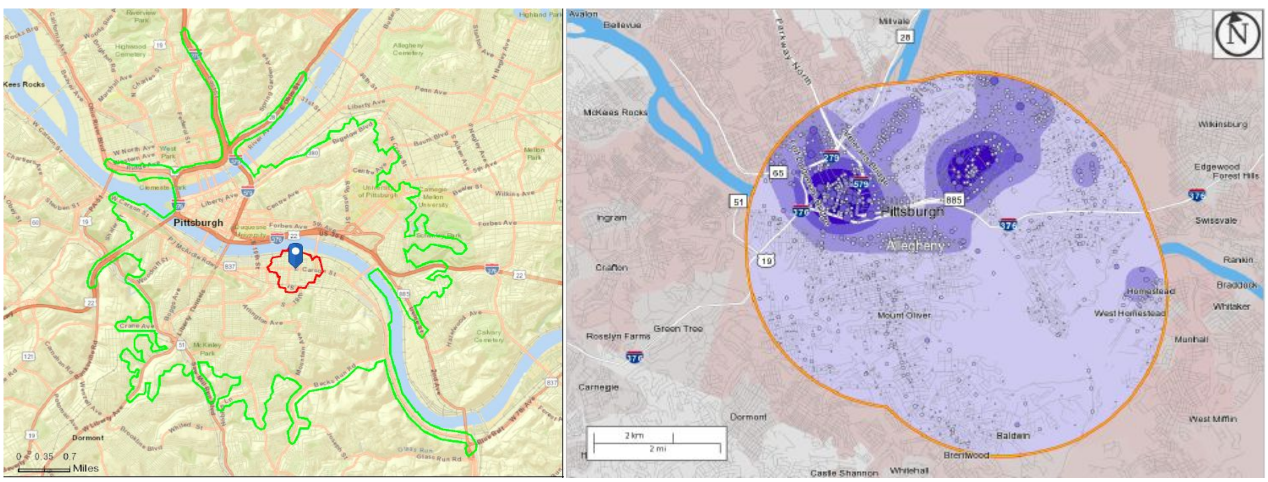
- **Host outdoor festivals**. Many people remarked on the success of Open Streets in the South Side and were interested in hosting more outdoor festivals. These festivals can include live music shows and focus on highlighting the eclectic style of East Carson Street.

- **Host pop-up shops in vacant storefronts**. Several people cited vacant storefronts as an issue and really liked the idea of supporting local small businesses in these spaces by allowing for pop-up shops until the storefront was rented out.

Market Analysis

The goal of the market analysis component of this project is to refine perception into a factual picture of the opportunities and issues associated with the East Carson Street Business District.

East Carson Street is the heart of Pittsburgh's South Side, one of the more dense neighborhoods in Pittsburgh. It borders the Monongahela River, connecting to Downtown via the Smithfield and Tenth Street Bridges, to the Hill District and Oakland via the Birmingham Bridge, and to Oakland and Hazelwood via the Hot Metal Bridge. The South Side is packed with rowhouses and small businesses that serve local residents and provide a destination entertainment attraction. The maps below show the two-minute drive time (red) and 10-minute drive time (green), as well as the jobs within 2.5 miles of the core (orange).



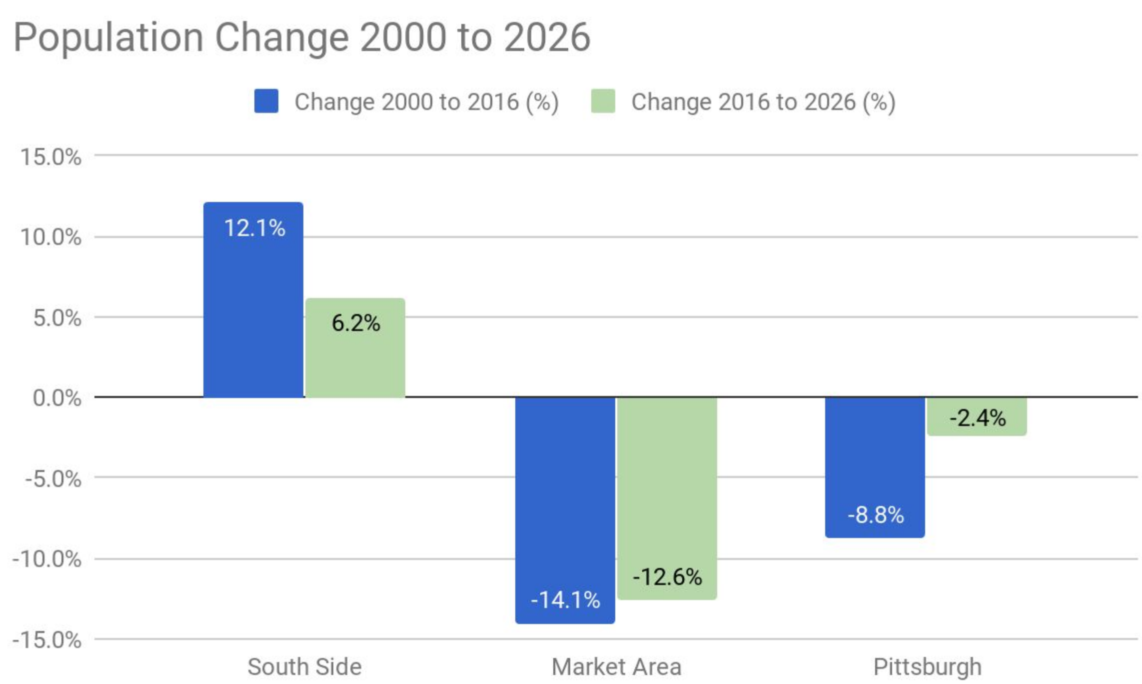
Note: two-minute drive time in red, 10-minute drive time in green, and jobs within 2.5 mile radius (orange).

The market analysis focuses on the South Side as defined by ZIP Code 15203, and a market area defined by a 2.5-mile radius that roughly corresponds to the 10-minute drive time. Data for the city of Pittsburgh is also provided, for further context.

Population

Population	2000	2010	2016	2026
South Side	8,933	9,499	10,015	10,635
Market Area	122,542	106,834	105,313	92,025
Pittsburgh	334,563	305,704	305,305	297,884

The South Side has a growing population and employment base. Population has increased from less than 9,000 in 2000 to more than 10,000 in 2016 and is projected to exceed 10,600 by 2026. Population in the Market Area has been declining, from more than 122,000 in 2000 to 105,000 in 2016, and is projected to fall to 92,000 around 2026. Pittsburgh's population decline has stabilized, but it could fall below 300,000 by 2026.

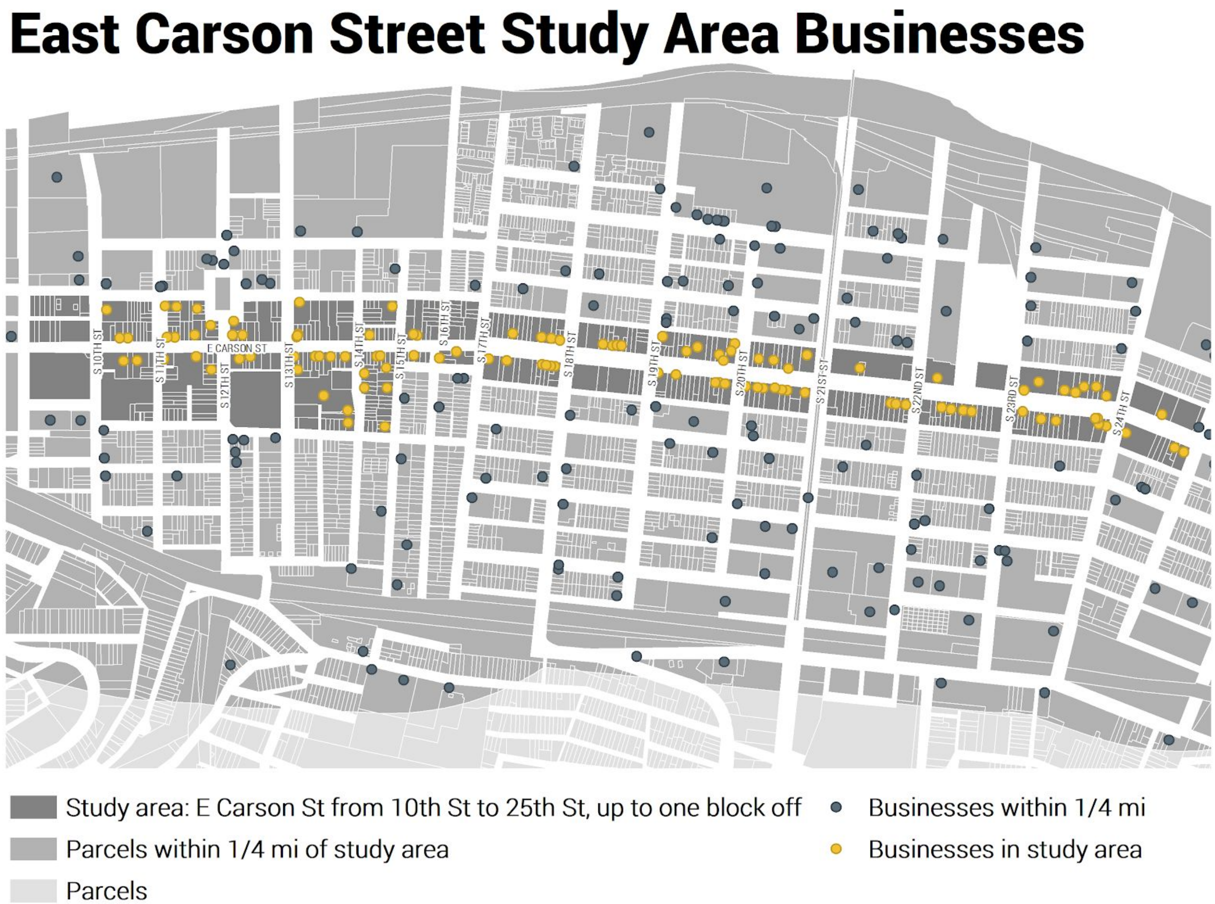


Population growth in the South Side grew by more than 12% from 2000 to 2016, but it is expected to slow to just above six percent from 2016 to 2026. Population decline in the Market Area and the city of Pittsburgh will slow down.

Employment

In terms of job growth, the South Side is also leading in the area, with a 35% increase in jobs from 2005 to 2015--well above the seven percent for Pittsburgh and only two percent for the Market Area.

Total All Jobs	South Side	Market Area	Pittsburgh
2005	8,007	225,932	258,283
2015	10,788	230,434	276,462
Change 2005-2015	2,781	4,502	18,179
Percent Change 2005-2015	35%	2%	7%



The South Side and the Market Area, which includes the Central Business District and Oakland, are job centers with more jobs than residents. The South Side is more evenly balanced, with 108 jobs per 100 residents, compared to the Market Area, which has 219 jobs per 100 residents.

	Population	**Jobs**	**Jobs per 100 Residents**
South Side	10,015	10,788	108
Market Area	105,313	230,434	219
Pittsburgh	305,305	276,462	91

Three of the top five job sectors for the South Side neighborhood and the larger Market Area are the same, although the exact rank of each sector differs for these areas. Accommodation and Food Services, Health Care and Social Assistance, and Professional, Scientific, and Technical Services are common to both. Finance and Insurance and Educational Services, which are in the top five for the Market Area, are not in the top five for the South Side. Retail Trade and Manufacturing are in the top 5 for the South Side but not the Market Area.

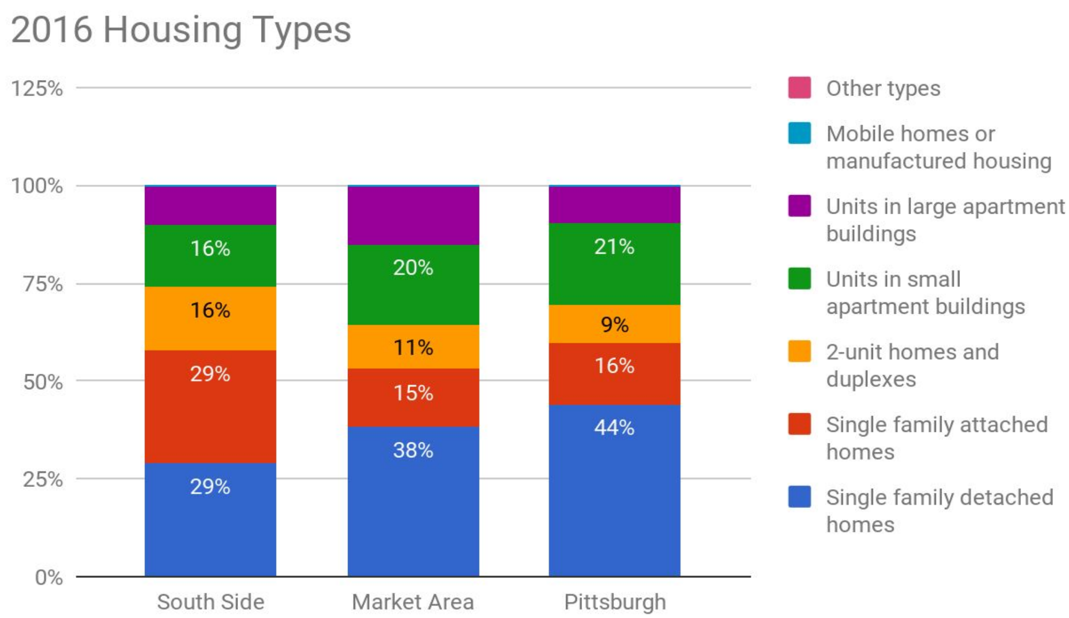
Top 5 Job Sectors	**South Side**
Accommodation and Food Services	2,195
Health Care and Social Assistance	1,938
Professional, Scientific, and Technical Services	1,436
Retail Trade	941
Manufacturing	560

Top 5 Job Sectors	**Market Area**
Health Care and Social Assistance	50,029
Finance and Insurance	33,234
Educational Services	31,477
Professional, Scientific, and Technical Services	21,070
Accommodation and Food Services	20,008

2015 Jobs - All Categories	South Side	Market Area	Pittsburgh
Agriculture, Forestry, Fishing and Hunting	0	1	1
Mining, Quarrying, and Oil and Gas Extraction	15	699	751
Utilities	48	1,186	2,396
Construction	261	3,154	5,638
Manufacturing	560	4,169	6,769
Wholesale Trade	518	3,773	6,041
Retail Trade	941	8,776	11,322
Transportation and Warehousing	337	1,681	5,041
Information	368	4,824	6,616
Finance and Insurance	353	33,234	33,865
Real Estate and Rental and Leasing	264	3,219	3,805
Professional, Scientific, and Technical Services	1,436	21,070	24,276
Management of Companies and Enterprises	166	14,082	15,000
Administration & Support, Waste Management and Remediation	310	5,649	9,603
Educational Services	403	31,477	34,914
Health Care and Social Assistance	1,938	50,029	60,430
Arts, Entertainment, and Recreation	345	5,664	8,091
Accommodation and Food Services	2,195	20,008	21,066
Other Services (excluding Public Administration)	295	6,204	8,495
Public Administration	35	11,535	12,342

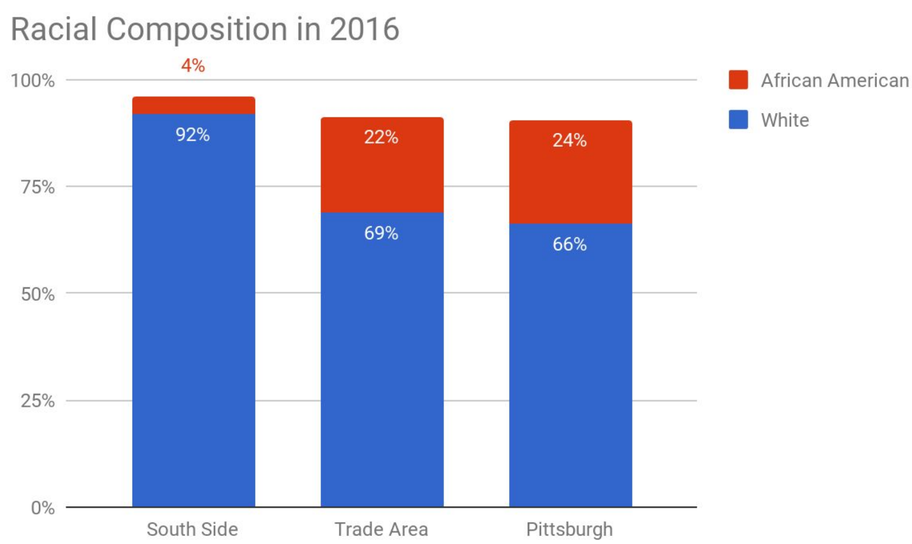
Housing

The South Side has fewer single-family detached homes and fewer apartments than the Market Area or Pittsburgh as a whole. It does have a higher share of 2-unit homes and duplexes.

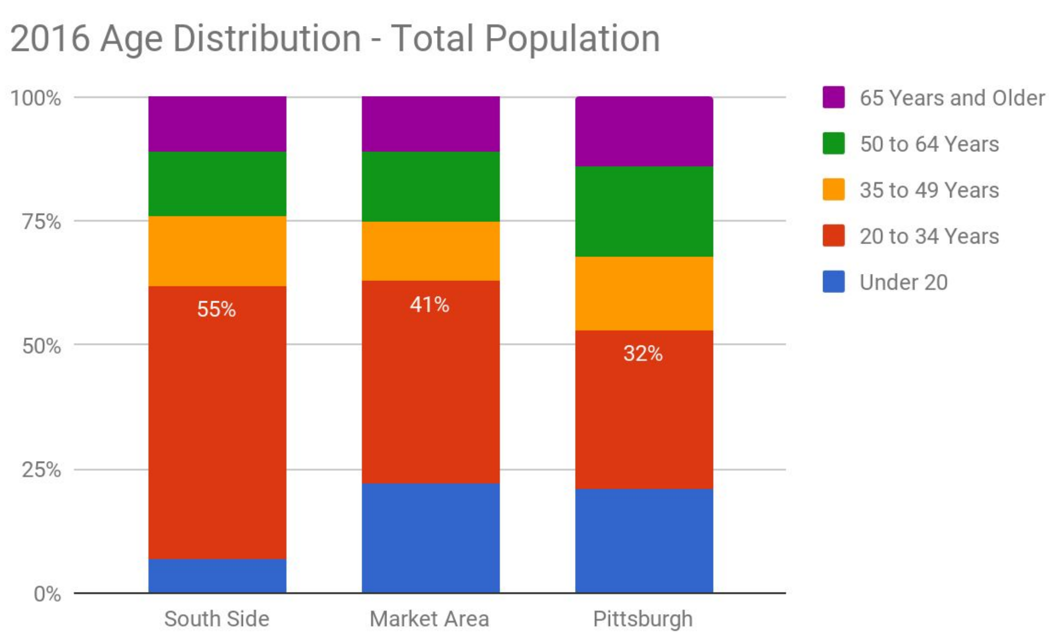


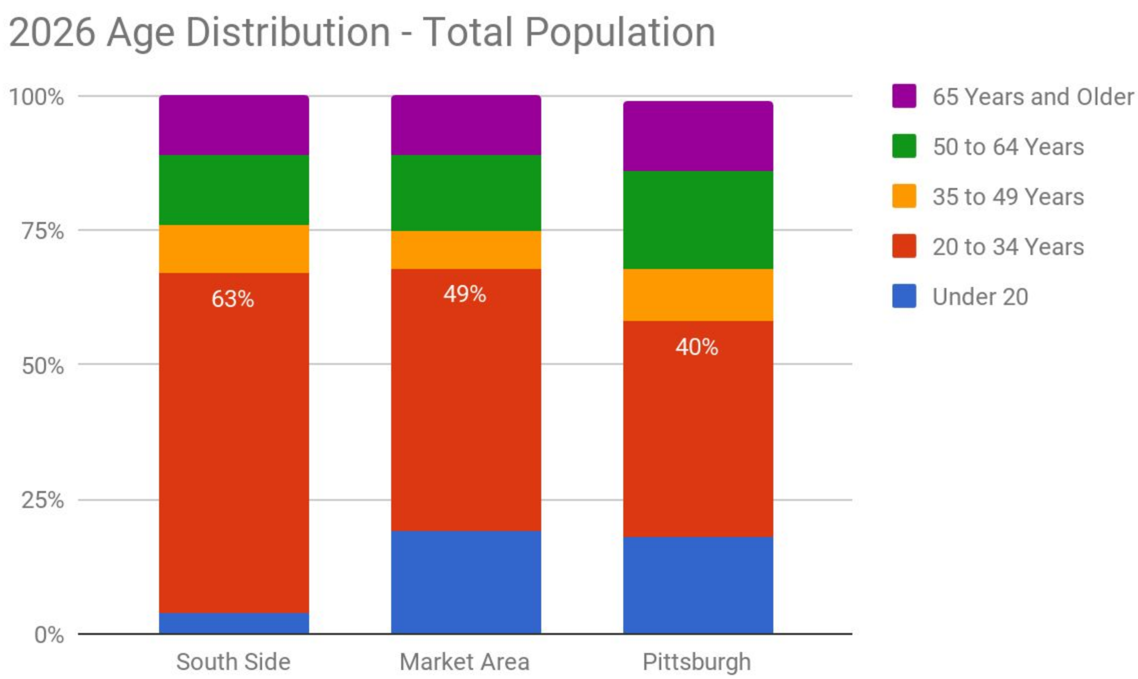
Demographics

Racially, the South Side is 92% White, compared to 69% in the Market Area and 66% in Pittsburgh. Four percent of South Side residents are African American, while African Americans comprise 22% of the Market Area and 24% of all Pittsburghers. Only 2.2 percent of South Side residents are Hispanic, compared to 2.9 percent in the Market Area and 2.8 percent for Pittsburgh overall.

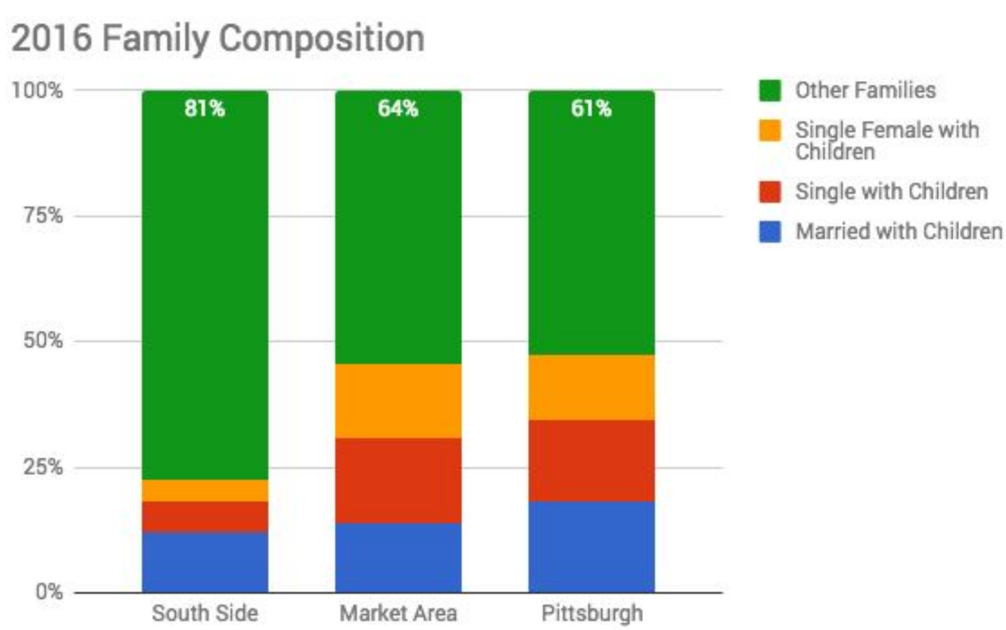


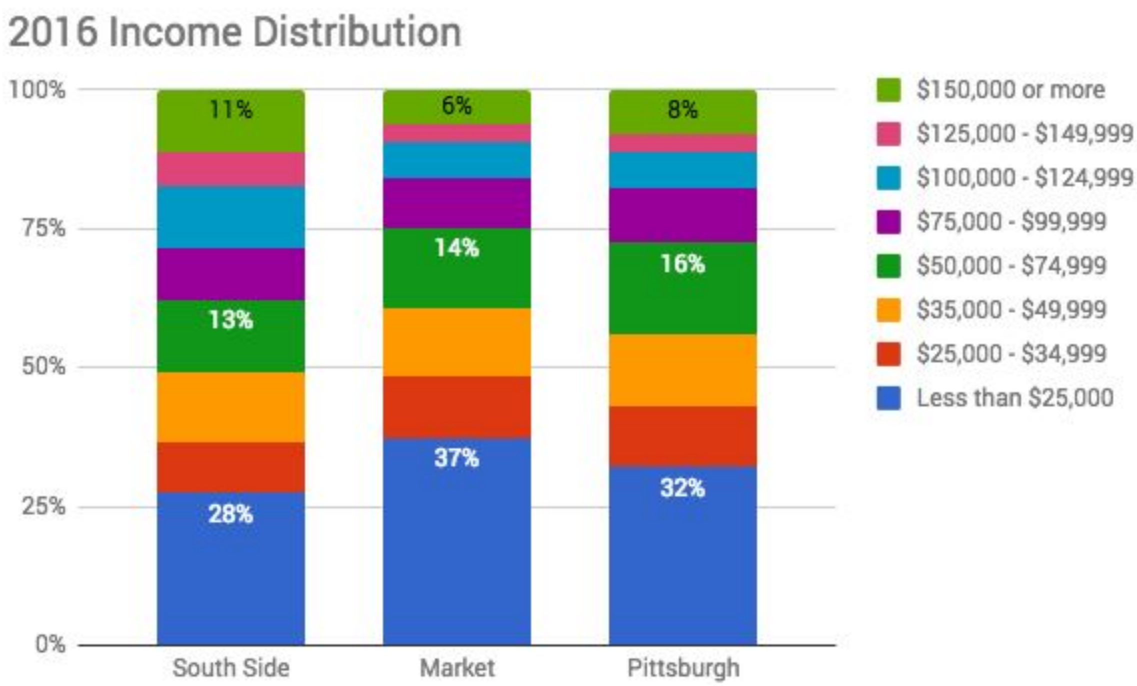
More than half of South Side residents are in the 20-to-34-year-old age group. The Market area is also an area with a young-adult majority. Despite the population losses in Pittsburgh, the city has had some growth in younger populations, driven by the universities and hospitals and overall strong job growth. Furthermore, this age group is expected to grow by 2026, when more than 6 out of every 10 residents will be aged 20 to 34.





Reflecting the youth of this area, there are few families or individuals with children in the South Side. In terms of income distribution, the South Side is a picture of extremes, with higher shares of residents at the lowest and highest income groups. The income distribution largely reflects the age and family composition of the South Side.





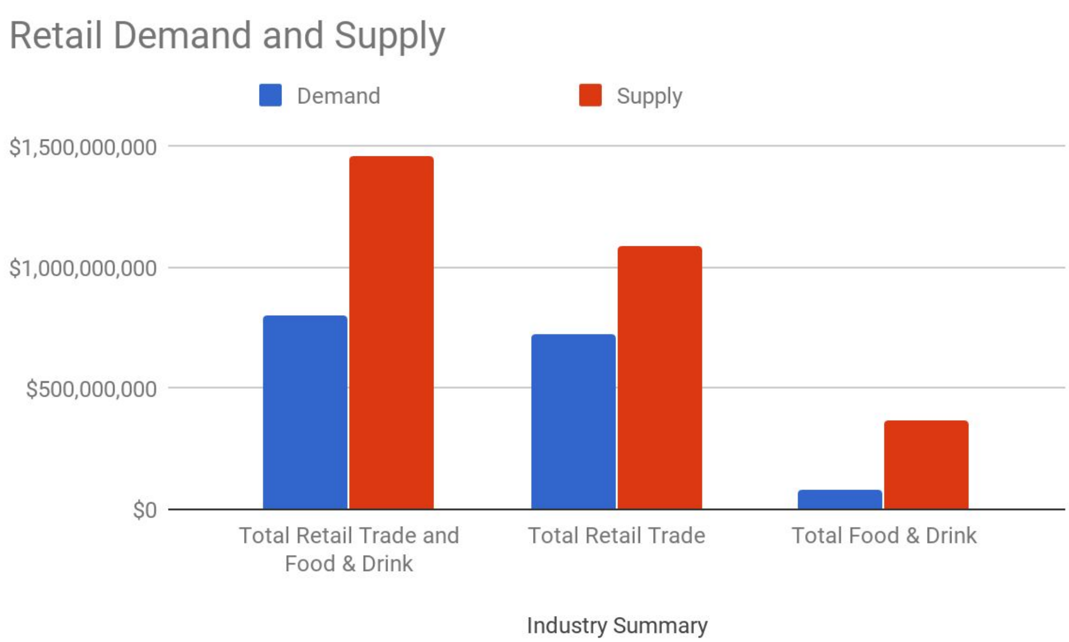
East Carson Tapestry Demographic Segments

ESRI is a national market database. The ESRI Tapestry Segmentation model helps to define customers' lifestyle choices, buying preferences, and how they use their free time. There are two major demographic segments in the South Side: College Towns and Metro Renters. The ESRI Tapestry profiles from the Tapestry Segmentation Reference Guide helped guide recommendations for this strategy based on what is known about these key segments, and the full reference guides from Esri are available in the Appendix.

Retail Supply and Demand

Based on the size and scale of competing business districts, This area captures consumer expenditures for a radius of 7 miles, but as a destination entertainment center for young adults, it has a regional draw, as well. Although it has this larger market capture, the core customers who most frequently visit the South Side and East Carson business district will live and work within a 10-minute drive time.

The retail trade and food-and-drink trade in this area attract consumer spending from outside the primary 10-minute drive time. Overall retail sales (supply) of nearly $1.5 billion far exceed the retail expenditures (demand) of area consumers. This amounts to a total of nearly $655 million in consumer expenditures that the area attracts from visitors outside of the core area. The area draws more than $362 million in retail trade annually from visitors and more than $292 million in expenditures for food and drink. The business district therefore continues to need customers from outside of the neighborhood and from beyond the 10-minute drive time in order to thrive. Supporting the needs of only local residents would greatly shrink the business district.



Although there is a surplus of retail trade and food-and-drink trade beyond what the residential base can support, there are several categories of trade that are underserved in the South Side. Unfortunately, many of these retail and service categories either do not fit the urban footprint of the business district (e.g., Motor Vehicles) or are facing high levels of competition from online retailers (e.g., General Merchandise Stores, Furniture and Home Furnishing Stores). The kind of stores that would fit the urban fabric are already represented in the city, so any expansion would likely poach consumers from other neighborhoods.

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**
General Merchandise Stores	$111,460,358	$31,344,811	$80,115,547
Motor Vehicle & Parts Dealers	$155,335,801	$132,978,412	$22,357,389
Gasoline Stations	$75,499,773	$64,321,966	$11,177,807
Furniture & Home Furnishings Stores	$25,540,166	$15,473,183	$10,066,983

In all other industry groups, the South Side draws consumer expenditures. Restaurants are the primary draw, accounting for more than $272 million in additional annual sales beyond the predicted market area demand. Clothing stores also provide a significant draw.

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Surplus (Draws Consumers)**
Restaurants/Other Eating Places	$71,718,532	$344,318,529	$272,599,997
Clothing Stores	$28,665,508	$123,488,512	$94,823,004
Drinking Places - Alcoholic Beverages	$4,064,115	$58,556,160	$54,492,045
Direct Selling Establishments	$2,419,698	$55,044,697	$52,624,999
Jewelry, Luggage & Leather Goods Stores	$6,883,052	$53,667,131	$46,784,079
Health & Personal Care Stores	$44,066,442	$90,531,152	$46,464,710
Beer, Wine & Liquor Stores	$6,005,059	$32,525,654	$26,520,595
Sporting Goods/Hobby/Musical Instr Stores	$18,377,476	$33,512,605	$15,135,129
Bldg Material & Supplies Dealers	$35,989,706	$47,826,515	$11,836,809
Used Merchandise Stores	$3,011,553	$13,169,956	$10,158,403
Specialty Food Stores	$6,534,343	$13,514,877	$6,980,534
Other Miscellaneous Store Retailers	$21,750,969	$26,745,382	$4,994,413
Shoe Stores	$6,240,186	$11,151,993	$4,911,807
Book, Periodical & Music Stores	$3,192,296	$6,576,460	$3,384,164
Florists	$1,274,515	$4,342,492	$3,067,977
Grocery Stores	$127,457,934	$130,238,434	$2,780,500
Special Food Services	$1,823,845	$3,383,714	$1,559,869

Note: These figures represent estimated sales from 2017 and may not include recently opened or closed businesses.

The South Side's principal challenge will be to define its niche compared to other business districts, such as the Central Business District, Lawrenceville, Oakland, Shadyside and East Liberty. There also are districts in the South Hills that compete with the South Side for consumer expenditures.

Nighttime Economy Analysis

An economic impact analysis of economic activity that occurs in the evening was conducted for the East Carson Street corridor's establishments and patrons. The analysis captures economic, employment, and government revenue impacts generated by these establishments and patrons using an IMPLAN model.

IMPLAN (short for "impact analysis for planning") is a standard economic modeling approach. IMPLAN provides a basic input/output model of economic activity that estimates the interactions between industries and households in an economy, to identify how transactions impact the production and consumption of goods and services in that economy. IMPLAN distinguishes among Direct, Indirect, and Induced impacts. *Direct* impact is the net change in revenue resulting from a transaction. *Indirect* effects take account of every resource that an industry needs to produce a unit of a commodity. *Induced* effects are the impacts resulting from re-spending of earnings generated by the direct and indirect expenditures.

For this study,he model is based on data for the 15203 zip code in Pittsburgh and estimated using IMPLAN's Social Account Matrix (SAM), which represents flows of all economic transactions taking place within this zip code. SAM multipliers include direct, indirect, and estimated induced effects based on the social account matrix. In addition, the SAM model accounts for social security and income tax leakage from the local economy, institution savings, commuting, and inter-institutional transfers. The direct, indirect, and induced effects specific to the nighttime economy are explained below:

Direct

Indirect

Induced

Direct economic impacts in this case come from actually selling the food and beverages in restaurants and bars. *Indirect* impacts include all of the things that factor into those businesses' sale of food and beverages, such as purchases of fresh foods, or contracts with linen purveyors. Finally, *induced* impacts come from all of the spending in the community by the people who work at a restaurant or bar during the evening hours, together with suppliers' earnings from the indirect impacts.

The IMPLAN model enables an analysis of the nighttime economy based on four major sectors of activity: Full-service restaurant, limited-service restaurant, drinking establishment (bar), and transportation. Data on establishments in the market area was collected, cleaned and summarized to identify the employment and sales for each category in the IMPLAN model. The model generates economic impacts from the most recent year using observations about the interplay between industries made in 2015. In other words, the economic impacts listed below can be considered as one year's worth of economic impacts.

The IMPLAN model does not fully account for the supply chain of full-service restaurants for special activities such as linen services or the purchase of locally sourced food. To correct for this, Fourth Economy identified local linen services and farms that supply food to local restaurants and estimated their potential sales and employment impacts as part of the full-service supply chain or indirect impacts.

The results are segmented by whether establishments are full-service, limited-service, or bars. *Full-service* restaurants are establishments that offer sit-down dining and generally also include liquor sales. *Limited-service* restaurants may offer some seating, but they do not provide liquor and also include takeout and delivery establishments. *Bars* might also sell food, but the majority of their sales are from drinks.

Transportation impacts are also captured. Transportation services include both public transit and other forms of for-hire transportation, as well as parking. Online and intercept surveys provided additional data on spending for food and beverages, as well as parking and transportation.

Nighttime Economic Outputs

The results of the analysis estimate a total economic impact of $304.1 million per year from the nighttime economy. The majority of the impact is from the direct activity of food, beverages and transportation, which together generate $215.8 million in direct economic output. The supply chain supporting this activity (indirect impacts) contributes $55.9 million, and spending by workers adds another $32.5 million. The breakdown by sectors and effects is provided in the table below.

	Full-Service Restaurants	Limited-Service Restaurants	Bars	Transportation	Total
Direct Effect	$77,887,880	$73,609,480	$58,556,160	$5,701,453	$215,754,973
Indirect Effect	$26,670,056	$16,248,424	$11,434,080	$1,506,755	$55,859,316
Induced Effect	$12,076,391	$6,634,091	$12,818,664	$955,208	$32,484,354
Total Effect	$116.6 million	$96.4 million	$82.8 million	$8.2 million	$304.1 million

In terms of jobs located in Pittsburgh, the nighttime economy in the East Carson Street business district supports 4,645 jobs annually. The bulk of these jobs are from direct employment in full-service restaurants and bars. Estimates for the number of jobs held by Pittsburgh residents are based on data from the U.S. Census's Longitudinal Employer-Household Dynamics (LEHD) program, which provides aggregate data on where people live and work, down to the Census block group level. This data provides an estimate of how many of the 4,645 jobs supported by East Carson Street's nighttime economy might be held by Pittsburgh residents. Based on the IMPLAN estimated jobs, the nighttime economy provides a total of 2,508 jobs for Pittsburgh residents. The full results of the employment impacts by sector and effect are provided in the table below.

All Jobs	**Full-Service Restaurants**	**Limited-Service Restaurants**	**Bars**	**Transportation**	**Total**
Direct Effect	1,595	863	1,424	81	3,963
Indirect Effect	307	79	56	9	451
Induced Effect	86	47	91	7	230
Total Effect	1,988	990	1,571	96	4,645
Jobs for Pittsburgh residents	Full-Service Restaurants	Limited-Service Restaurants	Bars	Transportation	Total
Direct Effect	861	466	769	44	2,140
Indirect Effect	166	43	30	5	244
Induced Effect	46	25	49	4	124
Total Effect	1,073	535	848	52	2,508

The nighttime economy in the East Carson Street business district provides an estimated $34.1 million in total annual state and local taxes. This estimate does not include property taxes, because there was no clear method for allocating a portion of those taxes to the nighttime economy. Taxes accruing to the school district amount to nearly $1.1 million annually, primarily from income taxes. The city receives an estimated $3.7 million per year, with the bulk of the revenue from the parking tax. Annual taxes for Allegheny County amount to nearly $9.5 million, primarily from the drink tax. The state receives nearly $19.9 million, with the majority of those revenues from sales and use taxes.

Annual Operating Taxes	**City**	**School**	**County**	**State**	**Total**
Parking	$2,455,196	NA	NA	NA	$2,455,196
Hotel Occupancy	NA	NA	$0	NA	$0
Sales and Use Taxes	NA	NA	$3,040,986	$18,245,919	$21,286,905
Drink Tax	NA	NA	$6,435,568	NA	$6,435,568
Earned Income	$531,232	$1,062,463	NA	$1,630,881	$3,224,575
Emergency Service Tax	$206,088	NA	NA	NA	$206,088
Payroll Prep	$541,069	NA	NA	NA	$541,069
Total Annual Operating Taxes	$3,733,584	$1,062,463	$9,476,554	$19,876,799	$34,149,401

Recommendations

To set the foundation for the three-year strategy, broad recommendations were developed based on the community engagement, market analysis, and impact analysis phases. The URA adopts the four components of Main Street transformation strategies in its commercial corridor. These are economic vitality, design, promotion, and organization. Both the broad recommendations and the three-year strategy are framed in these four components.

Economic Vitality

Economic vitality strategies should be informed by both the community vision and the market analysis. A critical component of economic vitality on East Carson Street will be considering the current and desired business mix.

Business Mix

The business types that generated the most interest in the public meeting and survey are detailed below.

Market Alignment

Specialty stores

Cheese shops, wine shops, butcher shops, bakeries, and retail stores with a social mission were all specialty shops that the community and market area would like to see on East Carson Street. This type of retail, which offers consumers a shopping experience that they cannot get online, aligns with the type of retail that is best weathering decline across the sector.

Unique dining

Restaurants and other eating establishments generate $344.3 million in revenue each year, with $272.6 million being drawn in from outside of the trade area. On one hand, this reflects a market strength, in that East Carson Street is already a destination for eating establishments. However, it also means that establishing a new location on East Carson Street and remaining successful there requires differentiating this new location from the high level of competition on the corridor.

Many community members expressed interest in seeing unique dining establishments, including early breakfast spots, higher-end dining options, and restaurants offering craft beer and wine that cater to an earlier evening clientele.

Fitness and wellness

Fitness and wellness came up in every component of the community engagement process. Not only would businesses focused around fitness and wellness align with the demographic tapestry segments' interests, but many stakeholders view Ascend, which opened in early 2017, as a success story and positive addition just a few blocks off of East Carson Street. Eating establishments on the corridor take advantage of the traffic coming to this and other fitness centers by advertising healthy menu options to enjoy on East Carson Street after a workout.

Potential Challenges

Additional fresh food options

At the public meeting in particular, community members expressed interest in additional fresh food options on East Carson Street. While this is not an impossible endeavor, fresh food markets can be difficult to establish and maintain in terms of financial sustainability, due to equipment needs and the short shelf-life of products. Any fresh food market would need to compete with the seasonal farmers market, Giant Eagle, and Aldi.

If the community and/or prospective business owners wish to add to the fresh food options available on East Carson Street, it will be critical to differentiate from the significant competition in the area. This could mean offering foods that are hard to find elsewhere (for example, culturally focused cooking ingredients that could save patrons a trip to the Strip District), offering on-site products like bakery goods and butchered meats, and providing high-quality produce that exceeds grocery store expectations in the farmers market off season.

Home Furnishings

While East Carson Street is home to PerLora, a long-standing, unique and successful home furnishings store, the community would also like to see quality chains such as Crate and Barrel, and additional collectible stores. This aligns with the ESRI tapestry model, but it is difficult to compete with online retailers. As mentioned in the market analysis, the kind of stores that would fit on East Carson Street do exist in the city, so competing with these will pose a challenge. If a business owner does wish to offer home furnishings on East Carson Street, they would have the support of the community but will need support (see below) to ensure their success and longevity. Again, this would mean significantly differentiating between their offerings and those online and at other locations throughout the city. Differentiators could include uniqueness of furnishings, local craftsmanship, or customization options, as lower pricing than online suppliers is unlikely to be achievable for a small-scale operation.

Incentives and Support

Working with business and property owners already on the corridor

Business and property owners on East Carson Street have access to a number of existing programs and incentives that work to help strengthen the corridor. Therefore, the beginning stages of this strategy will focus on coalition-building among these organizations and making connections between business and property owners with existing resources.

Of business owner survey respondents, only 42% reported their revenues increasing over the past year, while the remaining 48% reported revenues remaining the same or decreasing. This suggests that business owners should be supported in both internal and external processes. To help grow revenue internally, business owners should be connected with organizations that provide business owner education and lending. This way, the business owner could assess the root of any revenue challenges with support from an outside resource. URA and City of Pittsburgh staff can work with the community to connect businesses to these resources.

On the external side, business owners should be supported in marketing and promotions. Word of mouth was the most common form of advertising that business owners reported using and finding successful in the survey. Working with business owners to find creative ways to leverage their marketing successes and reach new markets should be adopted as a strategy that supports business marketing without creating burdensome additional work for the business owners.

In order to achieve the project stakeholder goal of raising the profile of specialty retailers, which is also desired by the community, retail owners should also be provided with or connected to coaching on customer service and merchandising. By providing excellent customer service in a setting that focuses on the experience and surroundings of the customer, the retailers can better compete with online outlets.

Working with businesses making location decisions

The URA frequently interacts with business owners making location decisions, and East Carson Street comes up as an option regularly. One of the first steps toward supporting the URA in encouraging businesses to locate on the corridor is understanding which spaces are available for rent or for lease and having descriptions of those spaces to match to the prospective business's needs. Therefore, the first recommendation to attract new businesses is to create a simple database to track availability. The database itself can be as simple as an excel file to start, with a larger effort needed on staffing a review of available properties at least on a quarterly basis.

Working with underutilized property owners
In addition to benefiting business owners, facade programs and other programs that assist property owners in improving the space available to businesses will help fill storefronts that are currently vacant.

One idea posed by the strategy review team was to provide financial incentives to business owners who might fill the storefronts if they have assistance in the first few months of occupancy and operation. While the mechanics of a program like this would need to be developed, the idea posed would be to consider pursuing funding to subsidize rent in the first few months and then decrease assistance until the tenant is paying the rent in full. Similarly, a master lease program, as suggested by the South Side Chamber of Commerce, is also a possibility, with one entity managing the leasing, and therefore business mix, of a portion of the properties on East Carson Street.

Another idea is to create pop-up events in vacant storefronts to activate the spaces, demonstrate their value to potential business occupants, and provide flexible space to fledgeling small businesses. Pop-up events could be hosted in partnership with the City and/or URA if there are properties they own and are willing to use for this purpose.

Design

A commercial corridor's design, or the way the corridor looks and feels to those visiting or travelling through, has a tremendous impact on initial perceptions, lasting impressions, and ultimately business success. Successful commercial corridors are welcoming, well-maintained, and focused on the experience of being there.

The public meeting fostered an engaged conversation among residents and business owners who are eager to continue working on design for East Carson Street. In addition to identifying active organizations to partner with, such as Tree Pittsburgh, and models in other parts of the city to draw inspiration from, such as PDP ambassadors, participants identified four key areas of focus they would like to begin to tackle in the near future. These are *green, clean, safe, and accessible*.

Green

Residents and business owners expressed interest in more greenery in the environment, for aesthetic reasons and for the calming effect that residents, in particular, want to experience in their walks down the corridor. At every stage of community engagement, more green space in general was an idea that arose again and again. Other benefits include energy efficiency in the summer months, improved property values, better stormwater management, and even crime reduction.

East Carson Street also has the benefit of being close to Pittsburgh's strong riverfront trail network. The riverfront is a recreational amenity to residents and also brings in visitors from the rest of the city. Because of the Great Allegheny Passage, which connects Pittsburgh to Washington, DC, the South Side is also positioned to benefit from trail tourism. According to the Trail Towns program, overnight visitors spend an average of $124 per night and daytime users spend an average of $18 per day. The South Side is flat and is home to at least one establishment that caters specifically to cyclists (Over the Bar Bicycle Cafe). These strengths can be leveraged to pursue the goal of increasing fitness- and wellness-focused businesses on East Carson Street, as they represent a customer base that aligns with these business types.

Clean

Unfortunately, one of the main concerns voiced by residents and business owners was a need for better litter and trash collection and control, and overall maintenance. Cleaner streets and sidewalks communicate a message that the corridor is cared about and makes customers feel at ease. It should be noted that visitors from other cities interviewed described East Carson Street as clean and nice, suggesting that the problem is not as insurmountable as it seems when viewed through a local lens. Some of the burden of sidewalk cleaning currently rests on volunteers and organizations like the Chamber of Commerce. However, funds from the Parking Enhancement District have enabled the hiring of a Clean Team, which has made a noticeable difference.

Safe

Perceptions of safety are always important in a commercial corridor, and the South Side's active nighttime economy makes this even more important: without feeling safe, fewer visitors are likely to patronize businesses in the evening.

From a proactive lens, physical safety strategies range from snow-and-ice removal to better lighting and maintenance of the much-needed public restroom at the S. 18th Street parking lot, which is currently not functional. Many project stakeholders reported that they would like to see a more visible police presence, sharing that the police presence on East Carson Street is complicated due to districting, and much of the security and policing within individual establishments is done on a contract basis.

During the course of this business district study, three dozen security cameras were installed by the Allegheny County District Attorney on East Carson Street between 10th and 19th Streets. The City also was continuing its saturation policing on weekends, with the addition of up to 24 patrol officers. According to the Pittsburgh Post-Gazette, the

South Side experienced a 30% reduction in crime over the past year due in part to these changes.

Accessible

East Carson Street should be accessible in many senses of the word: from basic access by several modes of transportation for residents, employees, visitors, and business owners to those who have disabilities or other mobility challenges. Many of the transportation ideas generated during the community engagement process are under consideration and may warrant further research as the City of Pittsburgh finalizes its upcoming streetscape project. Concurrently, PennDOT investments will address traffic calming, pedestrian safety, and other measures. Business owners and residents alike expressed concern that comprehensive sidewalk replacement is not included in the streetscape projects that are scheduled to be implemented in 2019.

One topic that arose again and again is parking. As noted in the community engagement section, there is strong interest in increased parking availability and a parking garage. At the same time, physical space for parking is limited and current parking options cannot possibly serve all residents, visitors, and employees.

Several solutions can help alleviate the parking issue. The relatively new pick-up and drop-off station on East Carson Street and the availability of ride-sharing services expand transportation options. Creative solutions, like contracting with a private parking garage and establishing a shuttle between the parking garage and destinations on East Carson Street, should be investigated, especially when it comes to providing safe access for employees who work late into the evening. The South Side Chamber of Commerce recently received a Community Infrastructure and Tourism Fund grant through Allegheny County to conduct a parking study of the South Side neighborhood.

Despite many establishments on East Carson Street being open and generating economic impacts until closing at 2 a.m., bus service ends at 1:30 am. Not only does this mean that visitors to these businesses cannot count on taking public transit home, but the employees who stay behind to close the businesses well past 2 a.m. are also unable to take public transit home. As a result, employees occupy parking spaces earlier in the evening when they arrive for work, incurring costs for gas and vehicle maintenance and often parking fees as well. Given the modest wages employees earn in these establishments and the tax revenue generated by these business activities, bus service should be expanded to cover these important early morning hours.

The culture and identity of East Carson Street should also be accessible to visitors, especially the creative and historic elements of the community. The South Side is full of interesting and historic architecture that can be highlighted and complemented with signage and streetscape selections that draw attention to the historic assets on the corridor. Building on existing art assets in the area, strategies to grow East Carson Street's cultural identity can include displaying local art in vacant storefronts and developing a brand identity for signage surrounding the arts and culture establishments. To this end, the physical inventory that was completed by the Design Center in 2017 should be updated annually. The update should highlight and ensure compliance with historic district standards. Also, business and property owners should be encouraged to fix and maintain their structures, and should be directed to URA facade and other programs for this work.

Promotion

Business owners, residents, and public officials alike expressed an interest in expanding the public perception of East Carson Street. In order to draw attention to the eclectic offerings on the corridor and challenge assumptions about East Carson Street, a branding and public relations campaign should be developed, beginning with the member organizations who served on the Strategy Review Committee.

While detailed steps will be developed over the first two years of implementation, ultimate visions for a campaign include promoting unique retail and other hidden gems, creating content that highlights positive news on East Carson Street for publishing in the *Reporter* and expanded to citywide outlets, and generating something like a "myth vs. fact" series. Project stakeholders would also like to see a common brand akin to Lawrenceville Corporation's doughboy-themed logo. Promotions activities should also include organizing public events to showcase the corridor. One possibility suggested at the public meeting was a food truck roundup.

A significant asset on the corridor that can help draw attention to the variety of amenities on East Carson Street is the array of cultural and entertainment options. A "Cultural District" Committee should be established and eventually be made up of a mix of residents and representatives from cultural institutions on the South Side, including City Theatre, WYEP, and the many existing music venues. Goals for this committee could be to advocate on behalf of entertainment venues to encourage cultural tourism through targeted marketing and to work to attract new galleries, music halls, festivals, and performing arts events on and near East Carson Street. .

Organization

The East Carson Business District Strategy has two strong foundational elements to build upon. First, a truly engaged Strategy Review Committee was integral in guiding the analysis and developing the priority actions for the project. Strategy Review Committee members included key City and URA staff members, South Side Chamber of Commerce, South Side Slopes Neighborhood Association, South Side Community Council, and Council President Bruce Kraus, whose constituency includes the South Side.

The second foundational element is the activism of residents. There is a core group of already engaged residents that want to make things happen on East Carson Street. They see the potential and have the skills, experience, and drive to support and lead initiatives as the strategy is implemented.

Recommendations for the organization segment of the business district strategy are detailed in the following section.

Three-Year Strategy

At the time of this report, more than 200 stakeholders have indicated their interest in staying involved in working to improve East Carson Street. Many of these attended the public meeting and worked together to identify priority actions to begin in Fall of 2018.

The organization to carry out the strategy should grow from a committee or task force structure in the first year comprised of Strategy Review Committee members, followed by a transitional second year, and culminating in the hiring of a paid staff member, such as a business district manager, by the third year.

Task forces should be formed to align with the four key elements of the strategy: economic vitality, design, promotion, and organization. In addition, a policy working group should be created to help provide research and analysis in the early stages of setting goals for the organization.

Each task force will be responsible for developing and implementing an annual plan for years two and three. The task force structure will ensure that each annual work plan is rooted in the expertise of the task forces and adaptable to opportunities and realities that arise each year. Meanwhile, developing capacity slowly before hiring a paid staff member ensures that the organizational functions necessary to implement the strategy are firmly in place to set the stage for discrete goals and tangible successes.

Timeline and Objectives

Period		Objectives
2018	Q4	● Assemble beginning task forces comprised of Strategy Review Committee members and a policy working group comprised of City and URA personnel. ● Task forces begin meeting to prioritize the broad strategies from this report and select one priority action to focus on in 2019.
2019	Q1	● Begin to expand task forces to include active stakeholders, especially those who expressed interest during the survey process and attended the public meeting in July of 2018. Identify low-hanging fruit for active community members and business owners to begin to work on. ● Policy working group: create working papers on each of the priority tasks identified by the four tasks forces to guide and clarify planning processes.
	Q2	● Task forces: begin to scan for resources and create a library of funding sources, alignment with priority actions, and deadlines. ● Engage active community members and business owners in simple, achievable activities to advance the priority action.
	Q3	● Task forces: draft a work plan for year two based on all prior steps (prioritization, policy papers, and resource scan). ● Begin fundraising based on resource scan in Q2. ● Expand, clarify, and refine priority actions selected for 2019 to inform annual plan for 2020.
	Q4	● Continue fundraising based on resource scan and continued efforts to build up library of funding sources. ● Each of the four task forces has completed a work plan, including who will carry out the key tasks for 2020.
2020	Q1	● Begin to identify potential leadership for task forces beyond the Strategy Review Team, based on engagement, activities, and achievements in 2019. For 2020, task force leaders will form the direction of the organization and evaluate achievements from the annual plans. ● Policy working group: begin to assess organizational options: 501c3 or employment within an existing organization or government agency for a paid staff member to be hired in 2021. ● Continue fundraising based on resource scan and continued efforts to build up library of funding sources.

	Q2	• Policy working group: convene task force representatives to consider and decide on which model of employment will be most appropriate for the paid staff member. • Task force leadership: convene to assess successes toward achieving priority actions outlined in 2020 annual plan. • Engage active community members and business owners in achievable activities from the 2020 plan to advance the priority action.
	Q3	• Continue fundraising based on resource scan and continued efforts to build up library of funding sources. • Organization task force: convene task force leadership to discuss and refine employment and organizational model options. • Develop preliminary objectives for a paid staff member to be hired in 2021. • Task forces: Expand, clarify, and refine priority actions selected for 2020 to inform annual plan for 2021.
	Q4	• Organization task force: convene to finalize selection of an organizational model, job description, and work space needs for a person to be hired in 2021. • Identify initial employer for the paid staff member. If the ultimate goal is a stand-alone organization, the paid staff member will likely need to be employed by a sponsor organization until sufficient capacity is available for more direct employment. • Each of the four task forces has completed a work plan to be carried out by task force members and transitioning to paid staff in 2021.
2021	Q1	• Release the job description, screen and interview candidates, and hire paid staff person to begin employment by March 2021. • Finalize work space for staff person. • Develop a clear work plan and measurable objectives to break down annual plan for paid staff member.
	Q2	• Task force leadership: convene to assess successes toward achieving priority actions outlined in 2021 annual plan. • Continue to secure funding and build capacity for the organization and programming as it becomes more robust.
	Q3	• Review Q2 activities, objectives, successes, and unexpected challenges with staff member and adjust or refine work plan for Q4.
	Q4	• Develop organizational, task force, fundraising, and priority action objectives for 2022.

Appendix

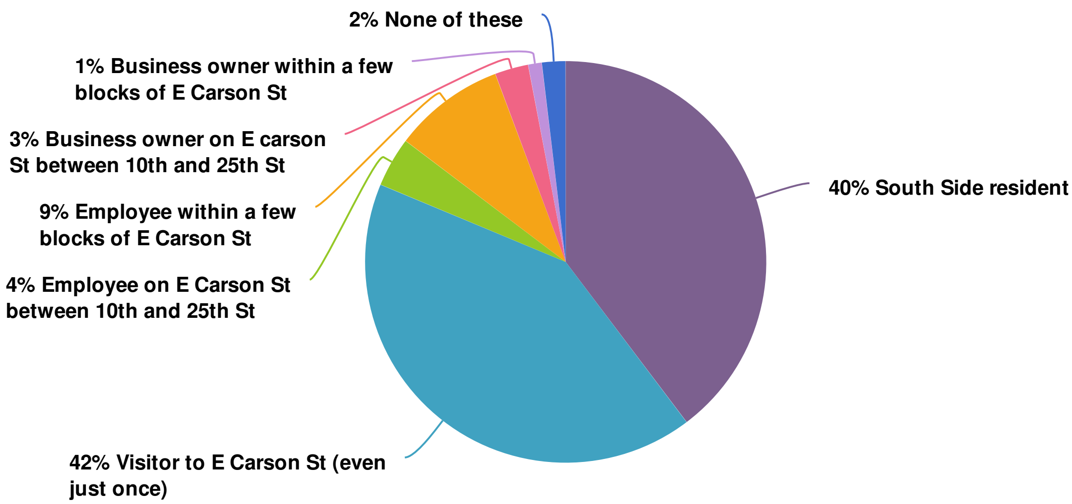
A1. Survey Report

E Carson St Survey Report

May 2018

Summary of Respondents

Which of the following best describes you?

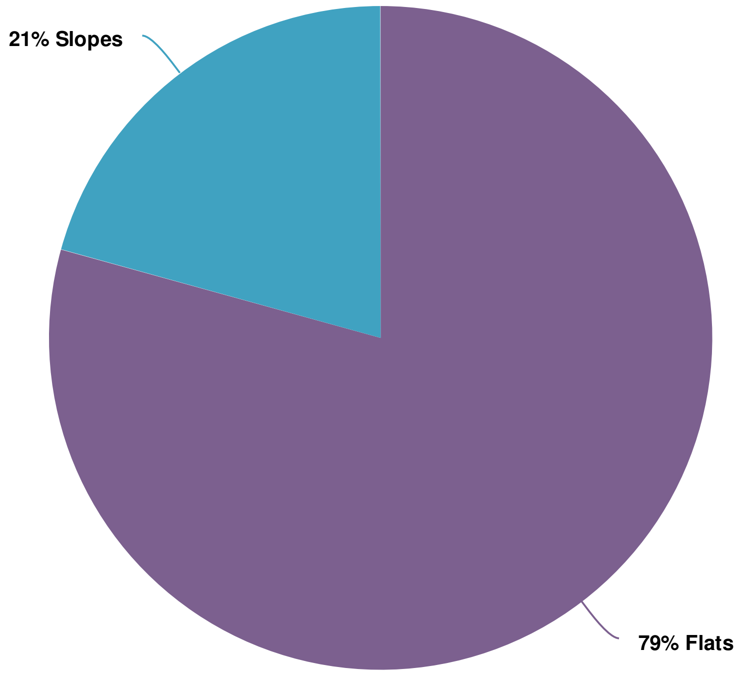


Value	Percent	Responses
South Side resident	39.7%	294
Visitor to E Carson St (even just once)	41.6%	308
Employee on E Carson St between 10th and 25th St	4.0%	30
Employee within a few blocks of E Carson St	9.0%	67
Business owner on E carson St between 10th and 25th St	2.7%	20
Business owner within a few blocks of E Carson St	1.1%	8
None of these	1.9%	14

Totals: 741

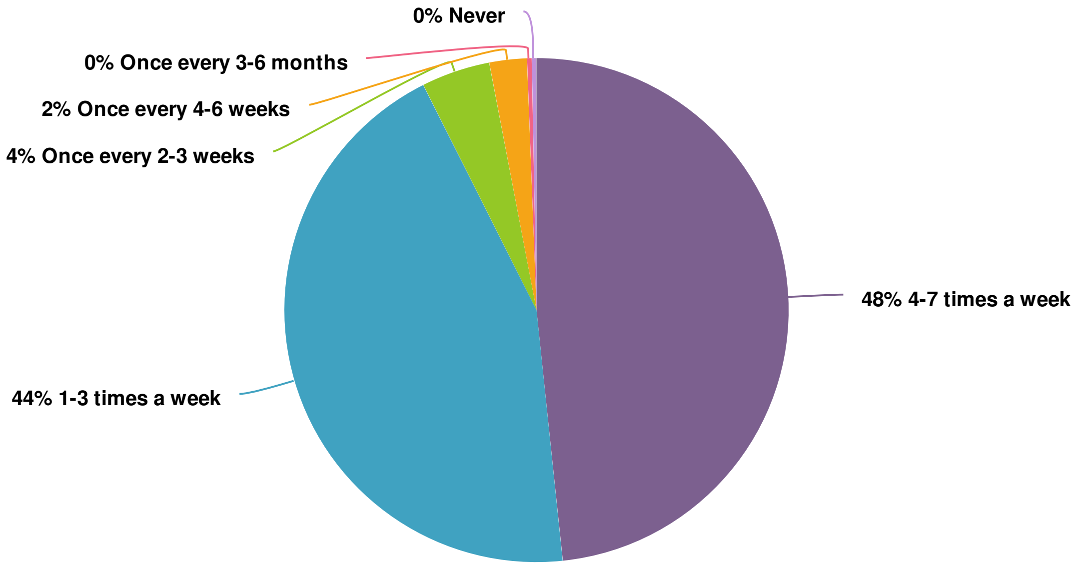
Resident Responses

Where in South Side do you live?



Value		Percent	Responses
Flats		79.3%	233
Slopes		20.7%	61
			Totals: 294

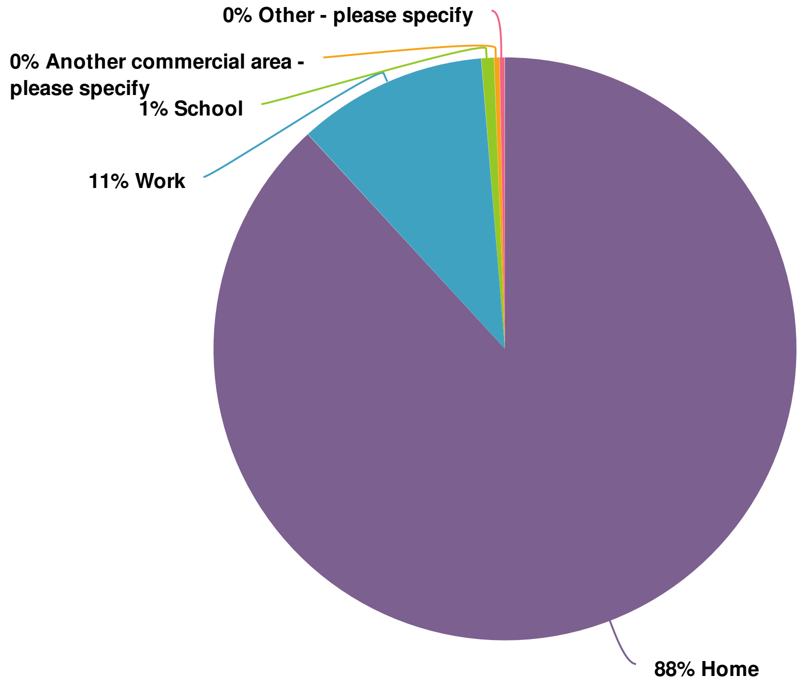
How often do you stop in a business on East Carson Street?



Value	Percent	Responses
4-7 times a week	48.3%	142
1-3 times a week	44.2%	130
Once every 2-3 weeks	4.4%	13
Once every 4-6 weeks	2.4%	7
Once every 3-6 months	0.3%	1
Never	0.3%	1

Totals: 294

Where do you typically come from directly before visiting East Carson Street?



Value	Percent	Responses
Home	88.1%	259
Work	10.5%	31
School	0.7%	2
Another commercial area - please specify	0.3%	1
Other - please specify	0.3%	1

Totals: 294

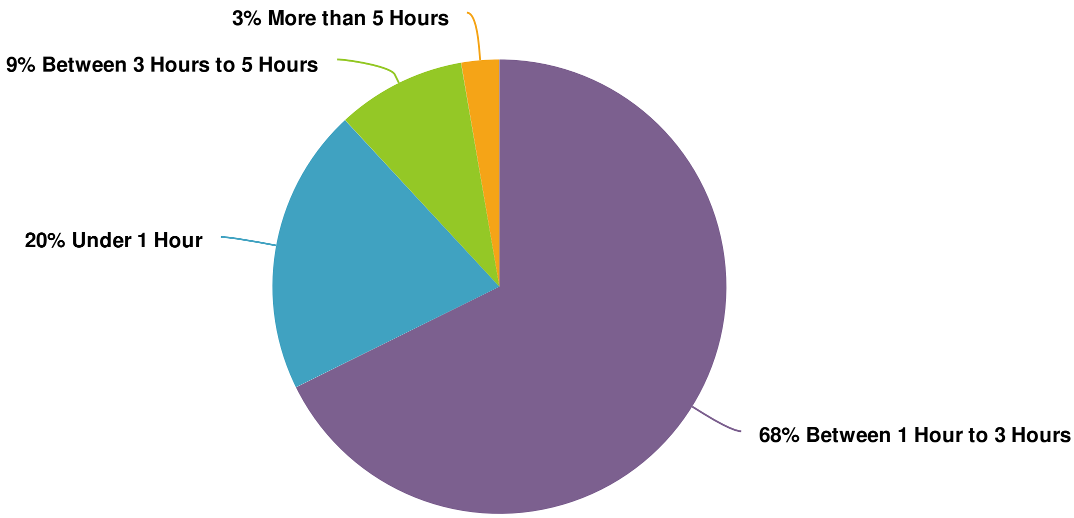
How do you travel to and from E Carson St?

	Bus	Uber, lyft, or taxi	Drive	Walk	Ride my bicycle	Carpool	Responses
On your way there Count Row %	8 2.7%	2 0.7%	72 24.5%	207 70.4%	5 1.7%	0 0.0%	294
On your way home Count Row %	9 3.1%	7 2.4%	79 26.9%	193 65.6%	6 2.0%	0 0.0%	294
Totals Total Responses							294

When do you usually visit E Carson St? Choose all that apply.

	Morning	Afternoon	Early evening	Late night	Total Checks
Monday, Tuesday Checks Row Check %	126 23.1%	146 26.7%	229 41.9%	45 8.2%	546
Wednesday, Thursday Checks Row Check %	114 21.4%	147 27.6%	225 42.3%	46 8.6%	532
Friday, Saturday Checks Row Check %	159 23.3%	203 29.7%	221 32.4%	100 14.6%	683
Sunday Checks Row Check %	166 29.8%	222 39.9%	141 25.3%	28 5.0%	557
Total Checks Checks % of Total Checks	565 24.4%	718 31.0%	816 35.2%	219 9.4%	2318 100.0%

How much time do you spend on East Carson Street during a typical visit?



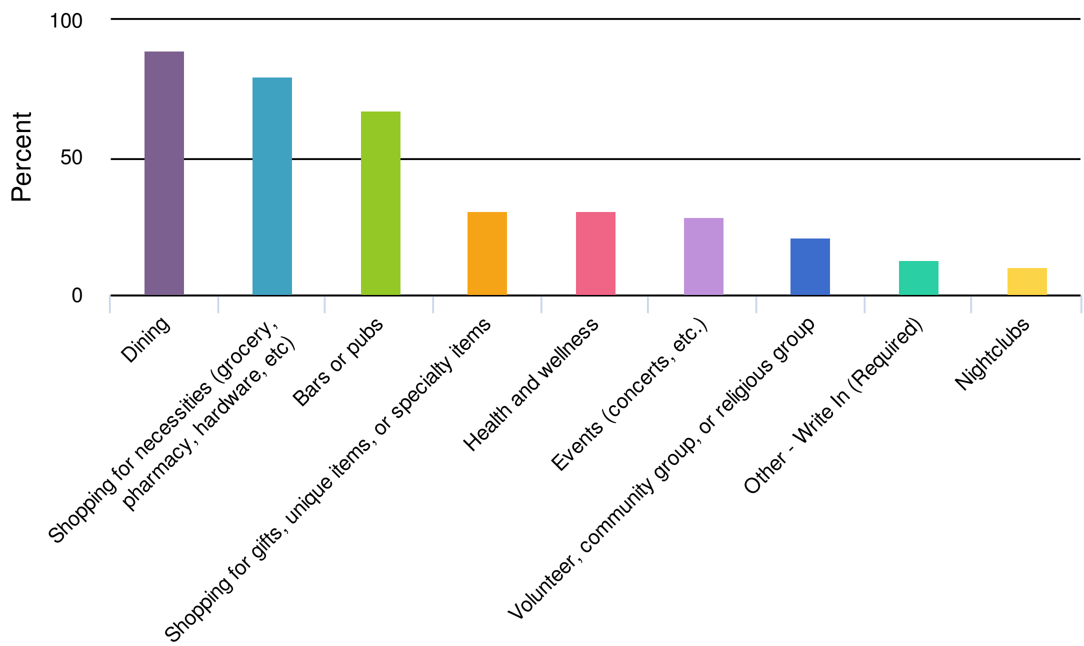
Value	Percent	Responses
Between 1 Hour to 3 Hours	67.7%	199
Under 1 Hour	20.4%	60
Between 3 Hours to 5 Hours	9.2%	27
More than 5 Hours	2.7%	8

Totals: 294

Where do you go most often for the following activities?

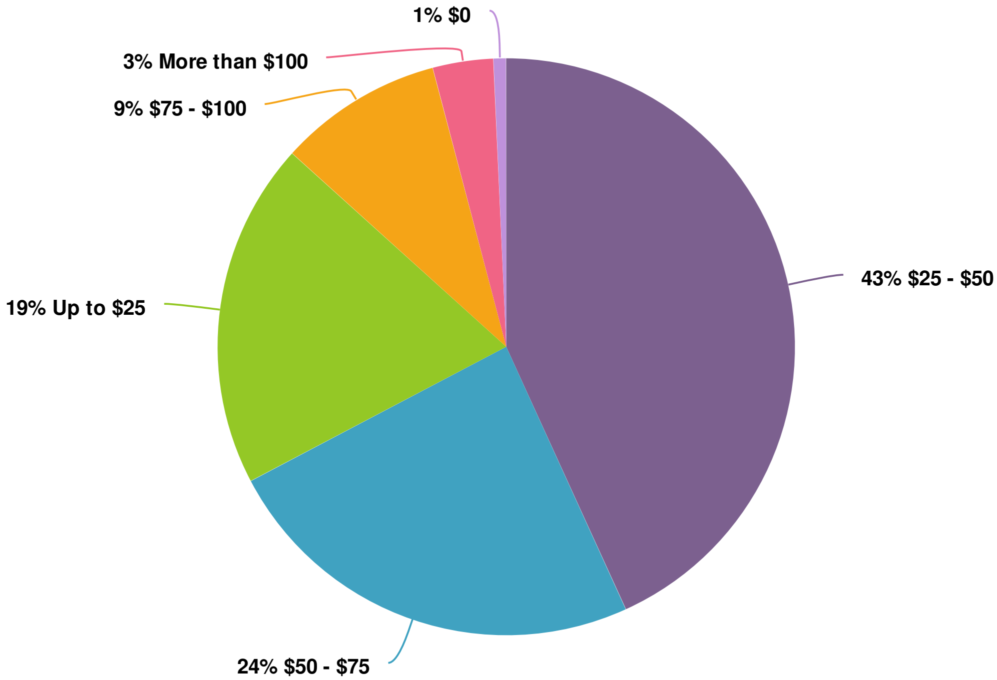
	Downtown	North Shore	South Side	Lawrenceville	East End	Oakland	Other	Responses
Shopping Count Row %	13 4.4%	0 0.0%	99 33.7%	8 2.7%	31 10.5%	4 1.4%	139 47.3%	294
Dining Count Row %	28 9.5%	2 0.7%	212 72.1%	24 8.2%	11 3.7%	2 0.7%	15 5.1%	294
Bars and nightlife Count Row %	27 9.2%	0 0.0%	191 65.0%	31 10.5%	10 3.4%	1 0.3%	34 11.6%	294
Events Count Row %	146 49.7%	46 15.6%	52 17.7%	8 2.7%	7 2.4%	7 2.4%	28 9.5%	294
Arts and culture Count Row %	175 59.5%	9 3.1%	30 10.2%	18 6.1%	8 2.7%	31 10.5%	23 7.8%	294
Totals Total Responses								294

What activities typically bring you to East Carson Street? Choose all that apply.



Value	Percent	Responses
Dining	88.8%	261
Shopping for necessities (grocery, pharmacy, hardware, etc)	79.9%	235
Bars or pubs	67.3%	198
Shopping for gifts, unique items, or specialty items	30.3%	89
Health and wellness	30.3%	89
Events (concerts, etc.)	28.9%	85
Volunteer, community group, or religious group	21.1%	62
Other - Write In (Required)	12.9%	38
Nightclubs	10.5%	31

How much do you spend on a typical visit?

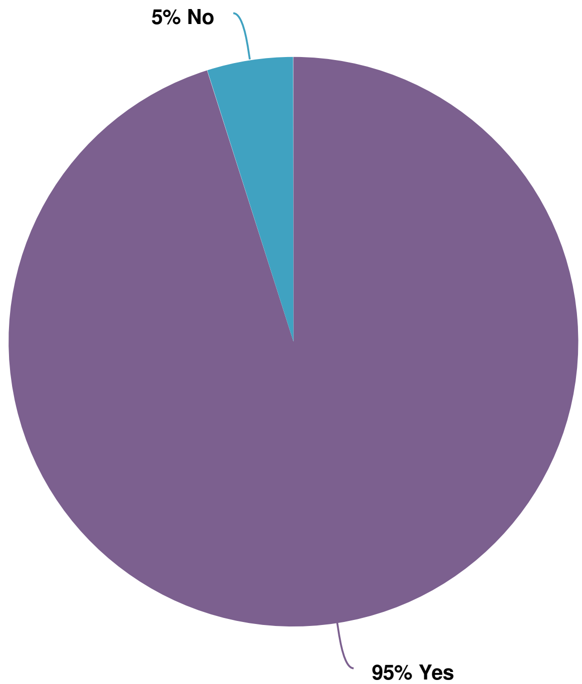


Value		Percent	Responses
$25 - $50		43.2%	127
$50 - $75		24.1%	71
Up to $25		19.4%	57
$75 - $100		9.2%	27
More than $100		3.4%	10
$0		0.7%	2

Totals: 294

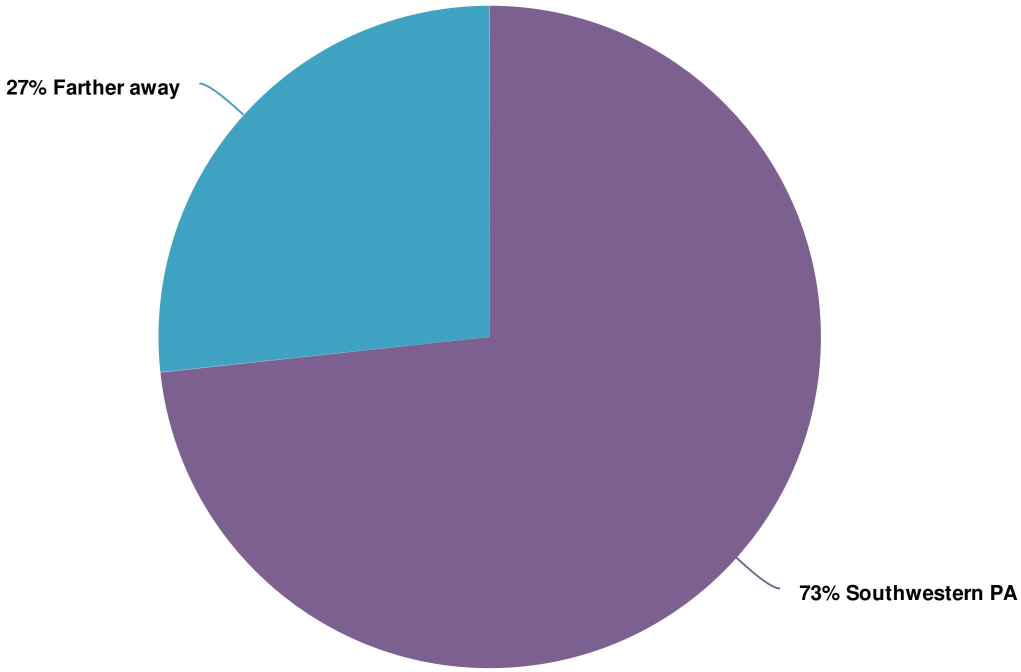
Visitor Responses

Do you live in Pittsburgh?



Value		Percent	Responses
Yes		95.1%	293
No		4.9%	15
			Totals: 308

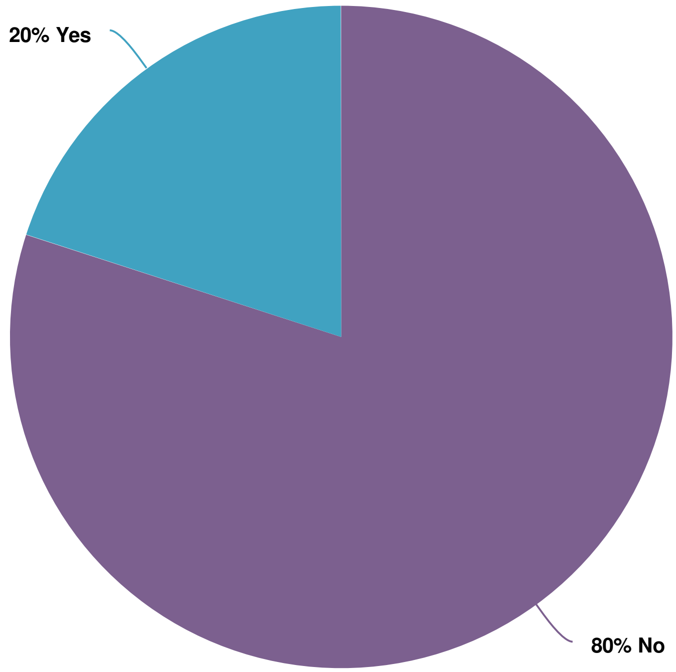
Have you visited E Carson St during a trip from Southwestern PA or from farther away?



Value		Percent	Responses
Southwestern PA		73.3%	11
Farther away		26.7%	4

Totals: 15

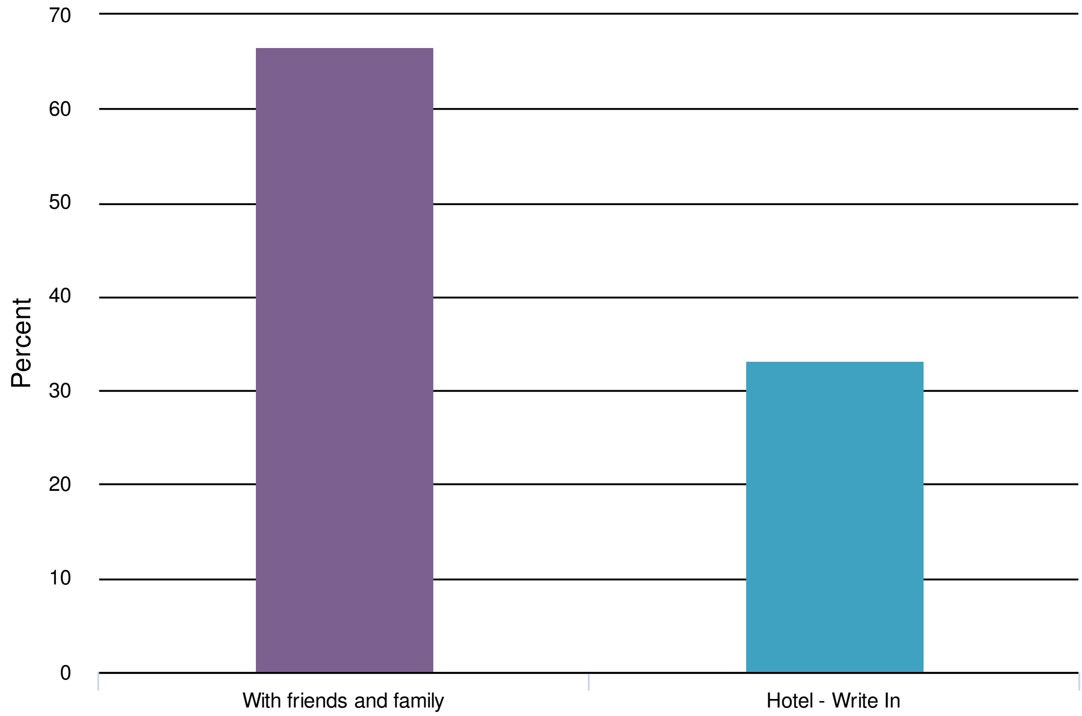
Have you visited E Carson St during an overnight trip to Pittsburgh?



Value	Percent	Responses
No	80.0%	12
Yes	20.0%	3

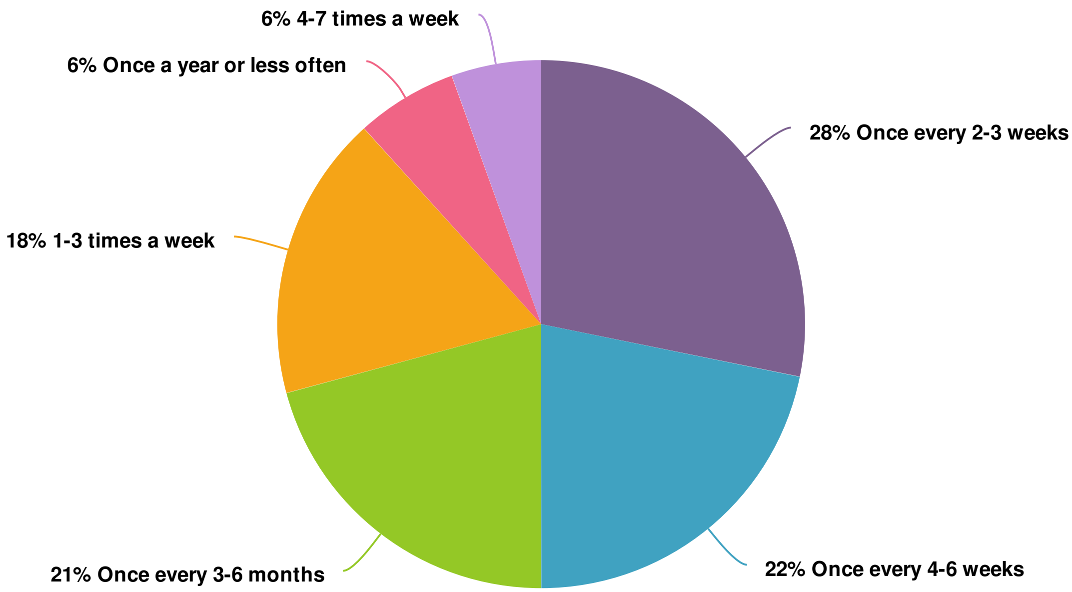
Totals: 15

Where have you stayed on overnights when you went to E Carson St?



Value		Percent	Responses
With friends and family		66.7%	2
Hotel - Write In		33.3%	1

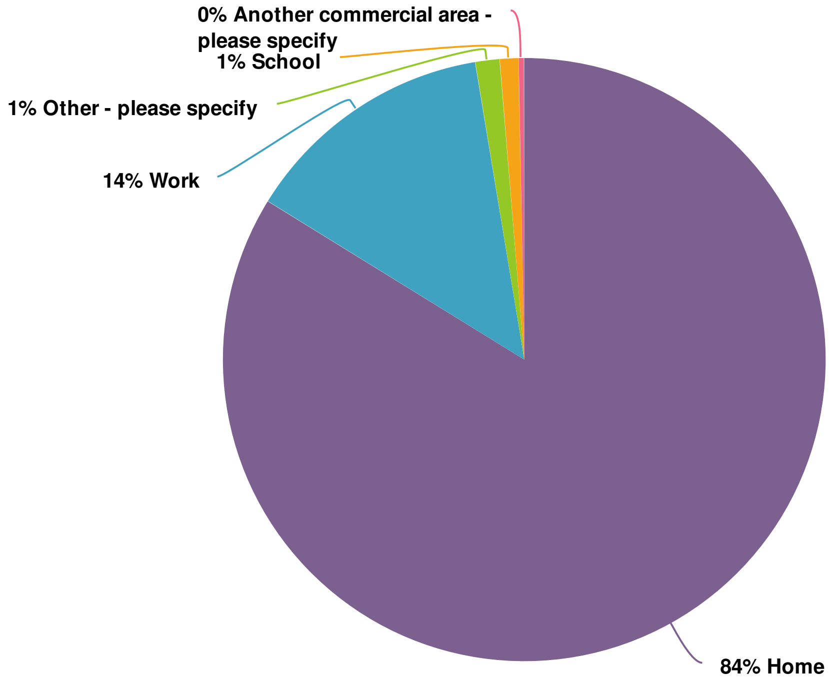
How often do you visit East Carson Street?



Value	Percent	Responses
Once every 2-3 weeks	28.2%	87
Once every 4-6 weeks	21.8%	67
Once every 3-6 months	20.8%	64
1-3 times a week	17.5%	54
Once a year or less often	6.2%	19
4-7 times a week	5.5%	17

Totals: 308

Where do you typically come from directly before visiting East Carson Street?



Value		Percent	Responses
Home		83.8%	258
Work		13.6%	42
Other - please specify		1.3%	4
School		1.0%	3
Another commercial area - please specify		0.3%	1

Totals: 308

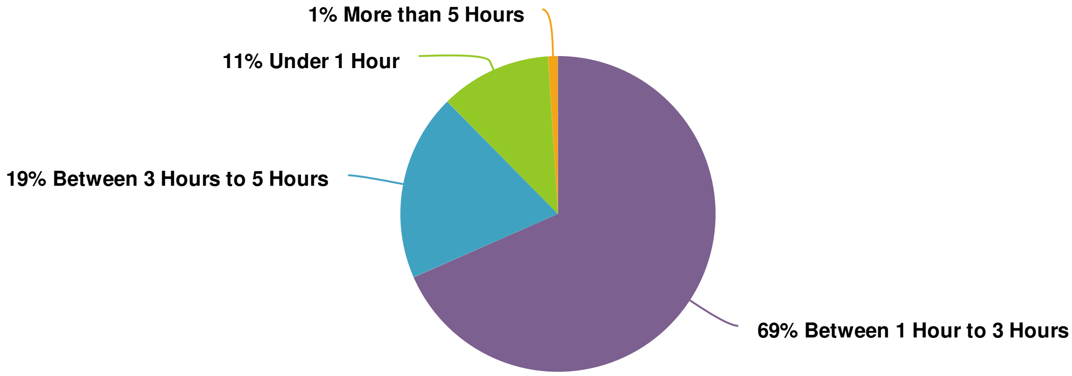
How do you travel to and from E Carson St?

	Bus	Uber, lyft, or taxi	Drive	Walk	Ride my bicycle	Carpool	Responses
On your way there Count Row %	27 8.8%	19 6.2%	242 78.6%	4 1.3%	11 3.6%	5 1.6%	308
On your way home Count Row %	22 7.1%	34 11.0%	234 76.0%	3 1.0%	9 2.9%	6 1.9%	308
Totals Total Responses							308

When do you usually visit E Carson St? Choose all that apply.

	Morning	Afternoon	Early evening	Late night	Total Checks
Monday, Tuesday Checks Row Check %	 48 12.1%	 127 32.0%	 186 46.9%	 36 9.1%	 397
Wednesday, Thursday Checks Row Check %	 43 11.0%	 122 31.1%	 193 49.2%	 34 8.7%	 392
Friday, Saturday Checks Row Check %	 63 12.7%	 148 29.8%	 195 39.3%	 90 18.1%	 496
Sunday Checks Row Check %	 77 22.3%	 161 46.7%	 87 25.2%	 20 5.8%	 345
Total Checks Checks % of Total Checks	 231 14.2%	 558 34.2%	 661 40.6%	 180 11.0%	 1630 100.0%

How much time do you spend on East Carson Street during a typical visit?

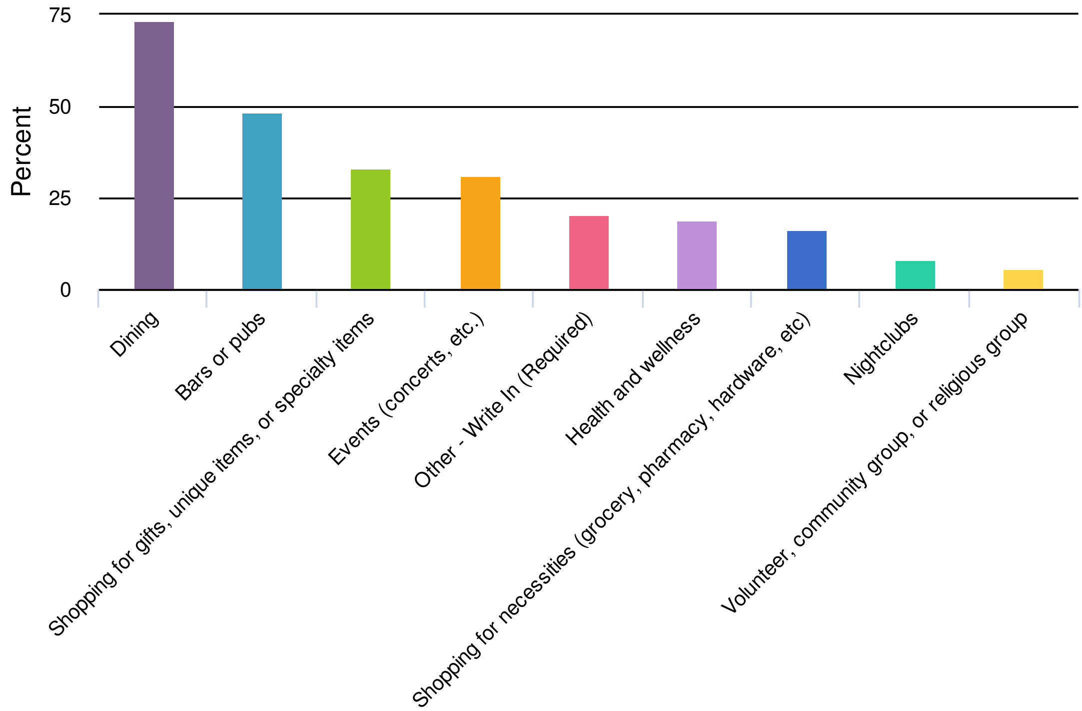


Value		Percent	Responses
Between 1 Hour to 3 Hours		68.5%	211
Between 3 Hours to 5 Hours		19.2%	59
Under 1 Hour		11.4%	35
More than 5 Hours		1.0%	3
			Totals: 308

Where do you go most often for the following activities?

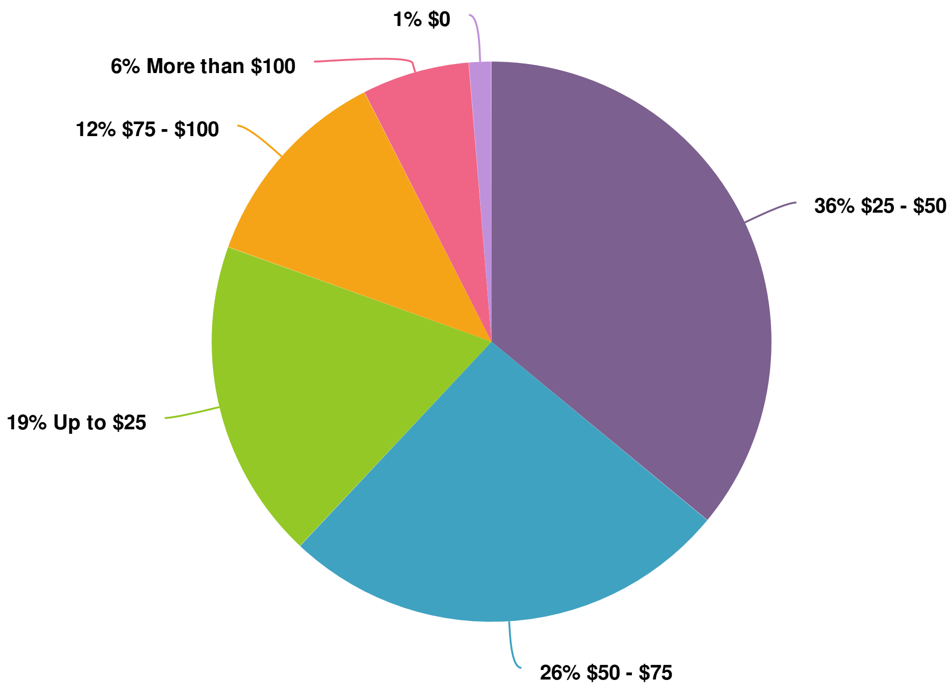
	Downtown	North Shore	South Side	Lawrenceville	East End	Oakland	Other	Responses
Shopping Count Row %	8 2.6%	0 0.0%	24 7.8%	12 3.9%	98 31.8%	1 0.3%	165 53.6%	308
Dining Count Row %	43 14.0%	10 3.2%	49 15.9%	45 14.6%	96 31.2%	8 2.6%	57 18.5%	308
Bars and nightlife Count Row %	23 7.5%	12 3.9%	69 22.4%	64 20.8%	51 16.6%	1 0.3%	88 28.6%	308
Events Count Row %	132 42.9%	42 13.6%	23 7.5%	15 4.9%	34 11.0%	22 7.1%	40 13.0%	308
Arts and culture Count Row %	185 60.1%	7 2.3%	9 2.9%	23 7.5%	21 6.8%	38 12.3%	25 8.1%	308
Totals Total Responses								308

What activities typically bring you to East Carson Street? Choose all that apply.



Value	Percent	Responses
Dining	73.4%	226
Bars or pubs	48.7%	150
Shopping for gifts, unique items, or specialty items	33.4%	103
Events (concerts, etc.)	31.2%	96
Other - Write In (Required)	20.5%	63
Health and wellness	18.8%	58
Shopping for necessities (grocery, pharmacy, hardware, etc)	16.2%	50
Nightclubs	8.4%	26
Volunteer, community group, or religious group	5.5%	17

How much do you spend on a typical visit?

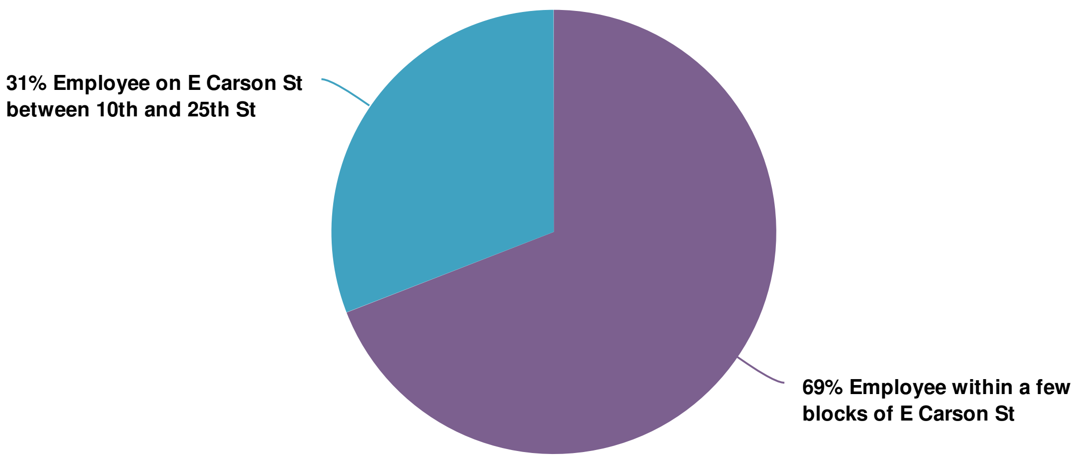


Value	Percent	Responses
$25 - $50	36.0%	111
$50 - $75	26.0%	80
Up to $25	18.5%	57
$75 - $100	12.0%	37
More than $100	6.2%	19
$0	1.3%	4

Totals: 308

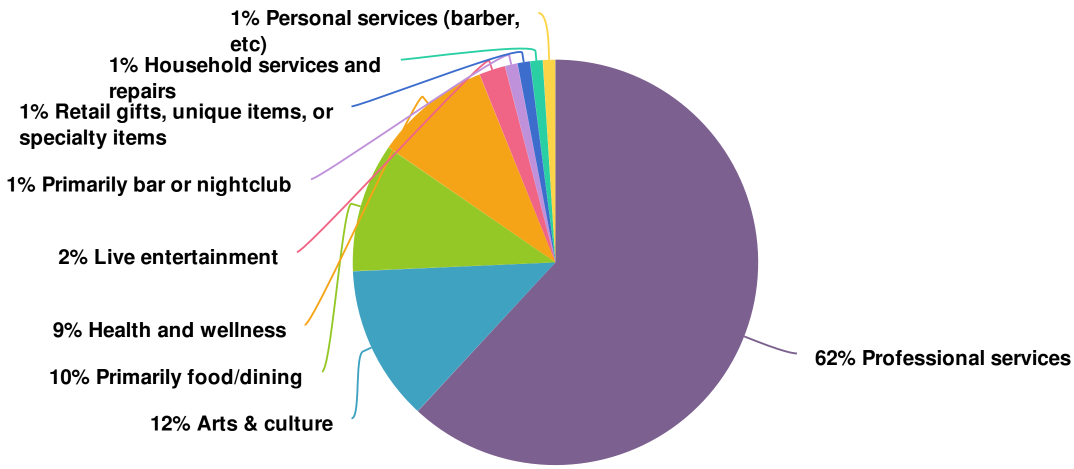
Employee Responses

Which of the following best describes you?



Value		Percent	Responses
Employee within a few blocks of E Carson St		69.1%	67
Employee on E Carson St between 10th and 25th St		30.9%	30
			Totals: 97

What kind of work do you do?



Value		Percent	Responses
Professional services		61.9%	60
Arts & culture		12.4%	12
Primarily food/dining		10.3%	10
Health and wellness		9.3%	9
Live entertainment		2.1%	2
Primarily bar or nightclub		1.0%	1
Retail gifts, unique items, or specialty items		1.0%	1
Household services and repairs		1.0%	1
Personal services (barber, etc)		1.0%	1

Totals: 97

When do you usually work? Choose all that apply.

	Morning	Afternoon	Early evening	Late night	Total Checks
Monday, Tuesday Checks Row Check %	91 40.6%	86 38.4%	41 18.3%	6 2.7%	224
Wednesday, Thursday Checks Row Check %	91 39.6%	87 37.8%	44 19.1%	8 3.5%	230
Friday, Saturday Checks Row Check %	81 40.7%	79 39.7%	30 15.1%	9 4.5%	199
Sunday Checks Row Check %	11 31.4%	11 31.4%	7 20.0%	6 17.1%	35
Total Checks Checks % of Total Checks	274 39.8%	263 38.2%	122 17.7%	29 4.2%	688 100.0%

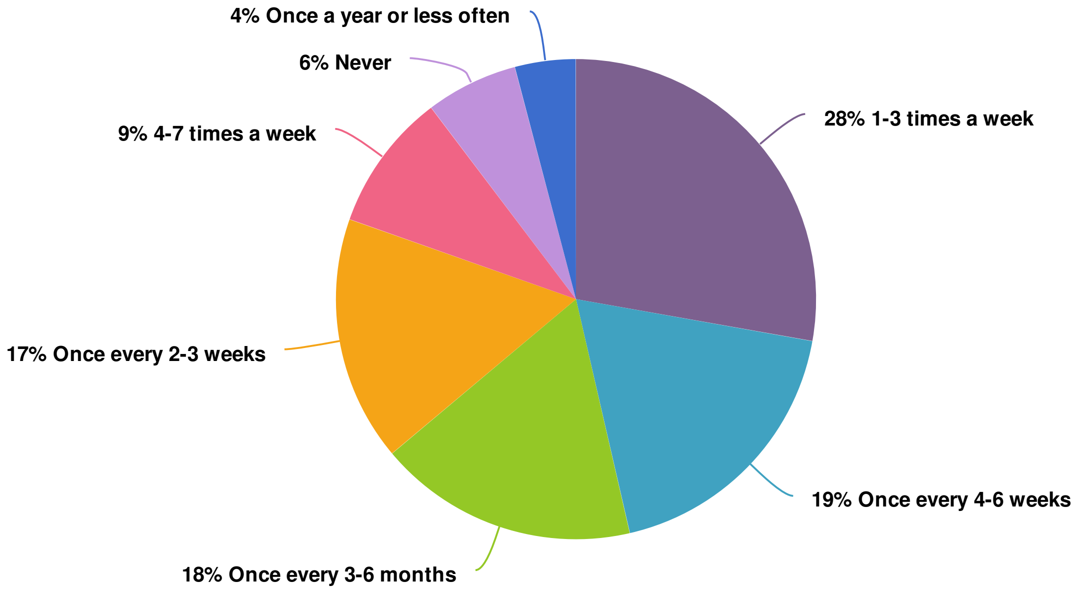
How do you travel to and from E Carson St?

	Bus	Uber, lyft, or taxi	Drive	Walk	Ride my bicycle	Carpool	Responses
On your way there Count Row %	7 7.2%	0 0.0%	80 82.5%	2 2.1%	6 6.2%	2 2.1%	97
On your way home Count Row %	8 8.2%	2 2.1%	79 81.4%	1 1.0%	5 5.2%	2 2.1%	97
Totals Total Responses							97

Where do you go most often for the following activities outside of work?

	Downtown	North Shore	South Side	Lawrenceville	East End	Oakland	Other	Responses
Shopping Count Row %	1 1.0%	2 2.1%	8 8.2%	5 5.2%	23 23.7%	0 0.0%	58 59.8%	97
Dining Count Row %	9 9.3%	5 5.2%	26 26.8%	17 17.5%	21 21.6%	0 0.0%	19 19.6%	97
Bars and nightlife Count Row %	7 7.2%	5 5.2%	22 22.7%	28 28.9%	11 11.3%	2 2.1%	22 22.7%	97
Events Count Row %	40 41.2%	14 14.4%	9 9.3%	8 8.2%	6 6.2%	4 4.1%	16 16.5%	97
Arts and culture Count Row %	50 51.5%	2 2.1%	7 7.2%	9 9.3%	6 6.2%	12 12.4%	11 11.3%	97
Totals Total Responses								97

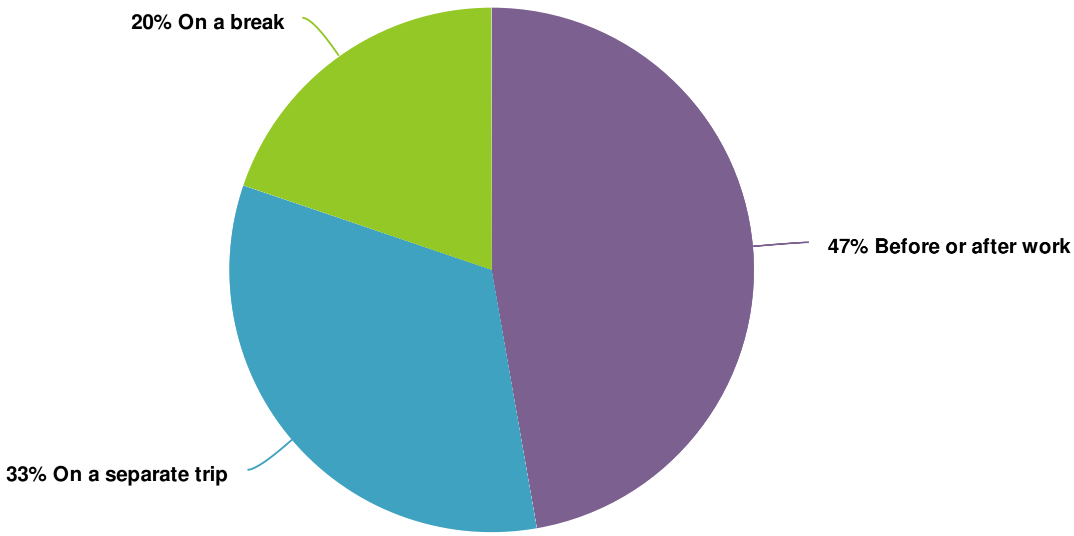
How often do you visit East Carson Street outside of work?



Value		Percent	Responses
1-3 times a week		27.8%	27
Once every 4-6 weeks		18.6%	18
Once every 3-6 months		17.5%	17
Once every 2-3 weeks		16.5%	16
4-7 times a week		9.3%	9
Never		6.2%	6
Once a year or less often		4.1%	4

Totals: 97

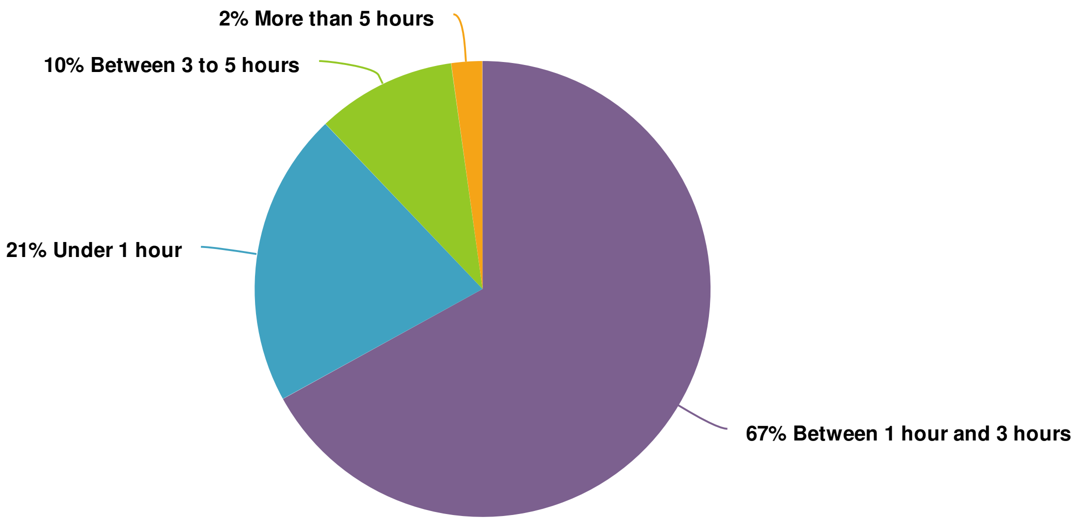
When do you typically visit East Carson Street outside of work?



Value		Percent	Responses
Before or after work		47.3%	43
On a separate trip		33.0%	30
On a break		19.8%	18

Totals: 91

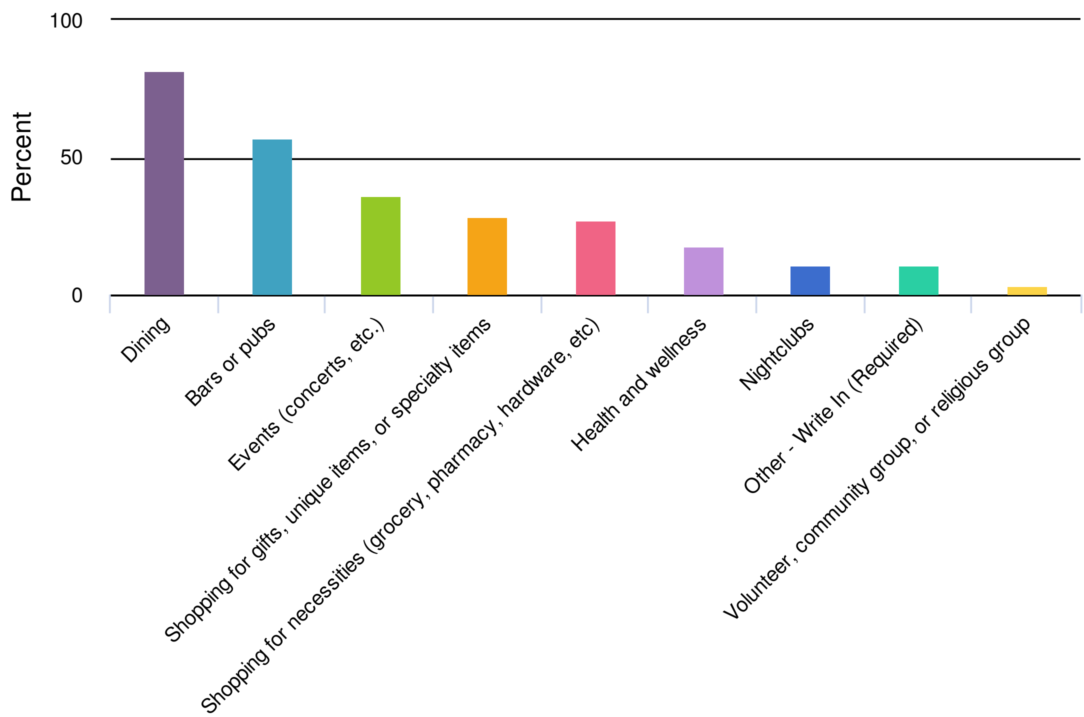
How much time do you spend on East Carson Street during a typical visit outside of work?



Value	Percent	Responses
Between 1 hour and 3 hours	67.0%	61
Under 1 hour	20.9%	19
Between 3 to 5 hours	9.9%	9
More than 5 hours	2.2%	2

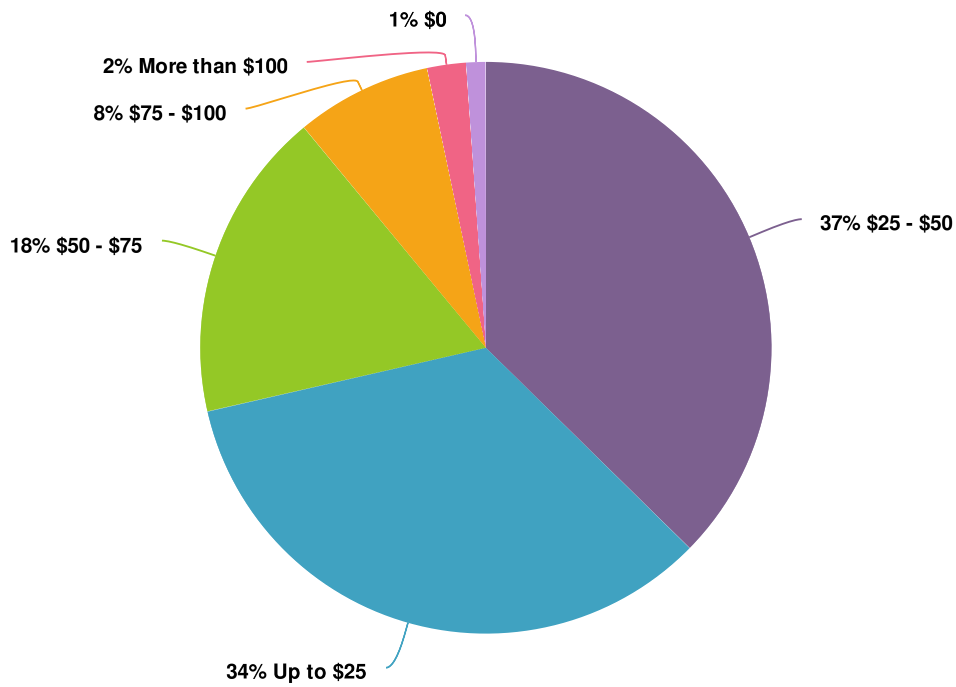
Totals: 91

What activities typically bring you to East Carson Street? Choose all that apply.



Value	Percent	Responses
Dining	81.3%	74
Bars or pubs	57.1%	52
Events (concerts, etc.)	36.3%	33
Shopping for gifts, unique items, or specialty items	28.6%	26
Shopping for necessities (grocery, pharmacy, hardware, etc)	27.5%	25
Health and wellness	17.6%	16
Nightclubs	11.0%	10
Other - Write In (Required)	11.0%	10
Volunteer, community group, or religious group	3.3%	3

How much do you spend on a typical visit?

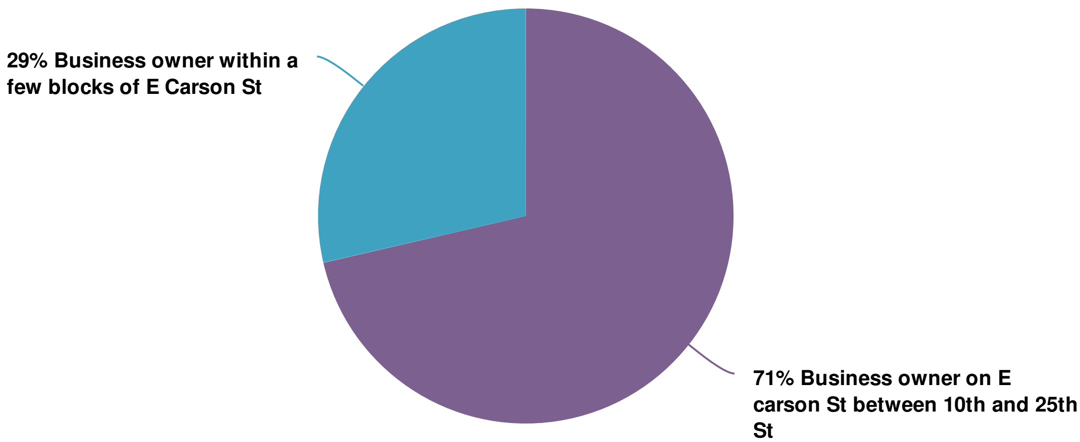


Value		Percent	Responses
$25 - $50		37.4%	34
Up to $25		34.1%	31
$50 - $75		17.6%	16
$75 - $100		7.7%	7
More than $100		2.2%	2
$0		1.1%	1

Totals: 91

Business Owner Responses

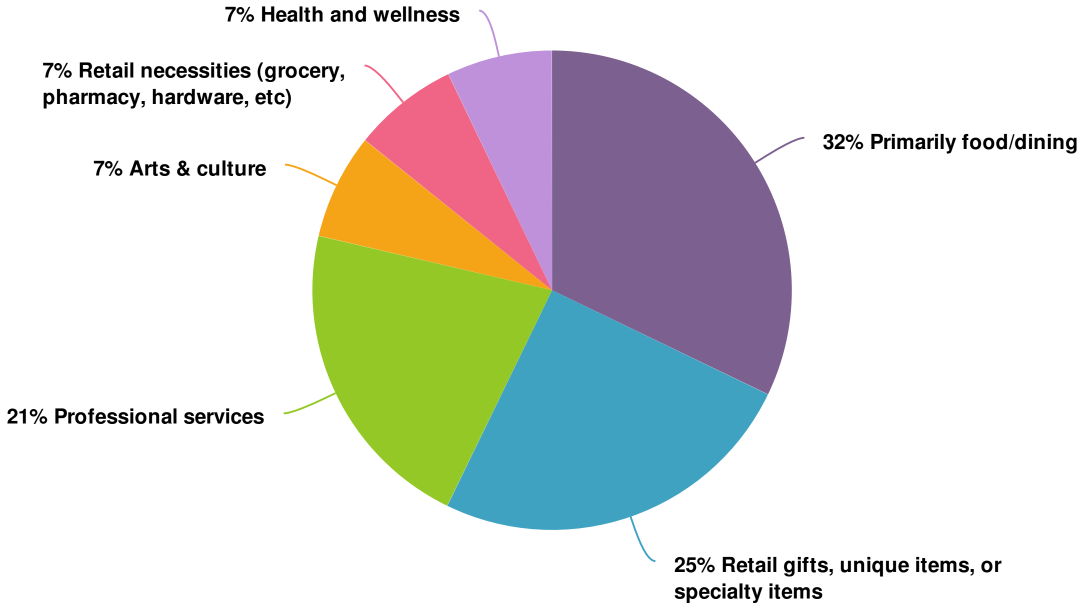
Which of the following best describes you?



Value	Percent	Responses
Business owner on E carson St between 10th and 25th St	71.4%	20
Business owner within a few blocks of E Carson St	28.6%	8

Totals: 28

What type of business do you represent?



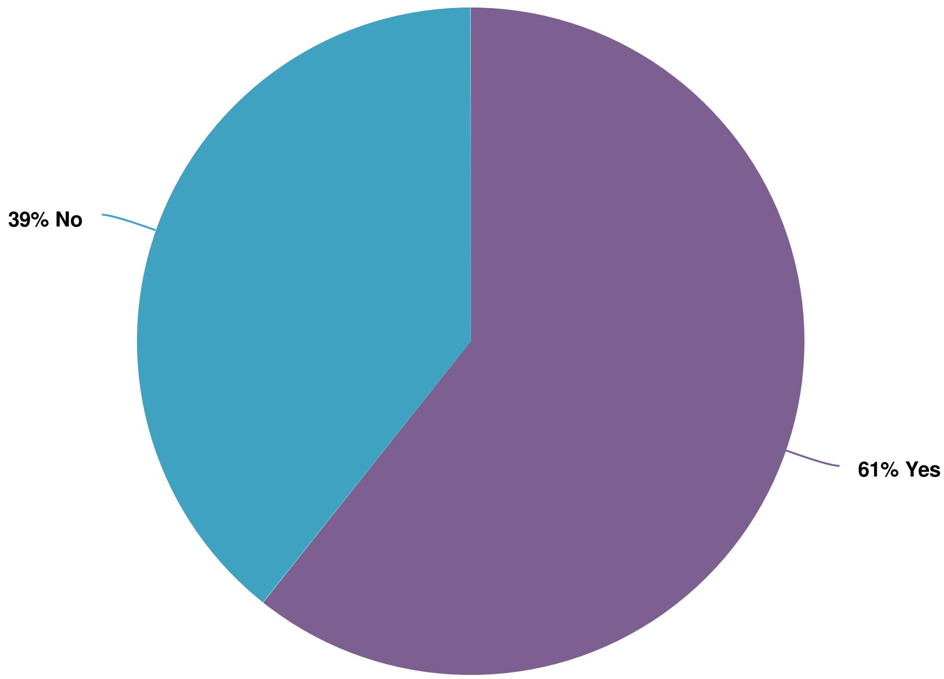
Value	Percent	Responses
Primarily food/dining	32.1%	9
Retail gifts, unique items, or specialty items	25.0%	7
Professional services	21.4%	6
Arts & culture	7.1%	2
Retail necessities (grocery, pharmacy, hardware, etc)	7.1%	2
Health and wellness	7.1%	2

Totals: 28

When are your core business hours? Choose all that apply.

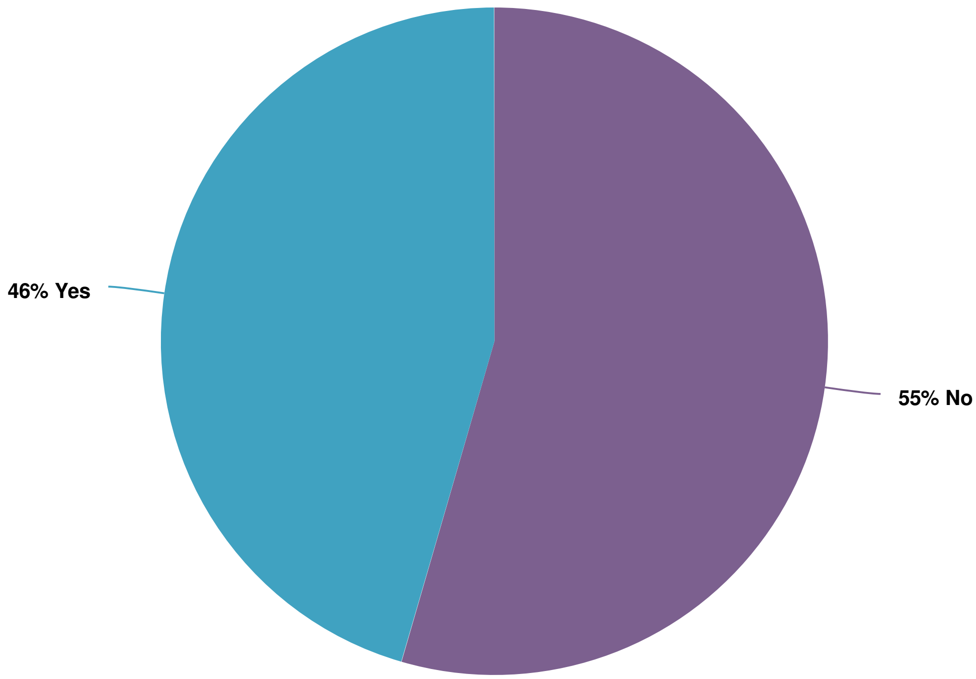
	Morning	Afternoon	Early evening	Late night	Total Checks
Monday, Tuesday Checks Row Check %	14 21.9%	25 39.1%	20 31.3%	5 7.8%	64
Wednesday, Thursday Checks Row Check %	15 22.4%	25 37.3%	22 32.8%	5 7.5%	67
Friday, Saturday Checks Row Check %	19 28.4%	24 35.8%	18 26.9%	6 9.0%	67
Sunday Checks Row Check %	16 31.4%	19 37.3%	13 25.5%	3 5.9%	51
Total Checks Checks % of Total Checks	64 25.7%	93 37.3%	73 29.3%	19 7.6%	249 100.0%

Is the business you own on East Carson Street the only business you own?



Value		Percent	Responses
Yes		60.7%	17
No		39.3%	11
			Totals: 28

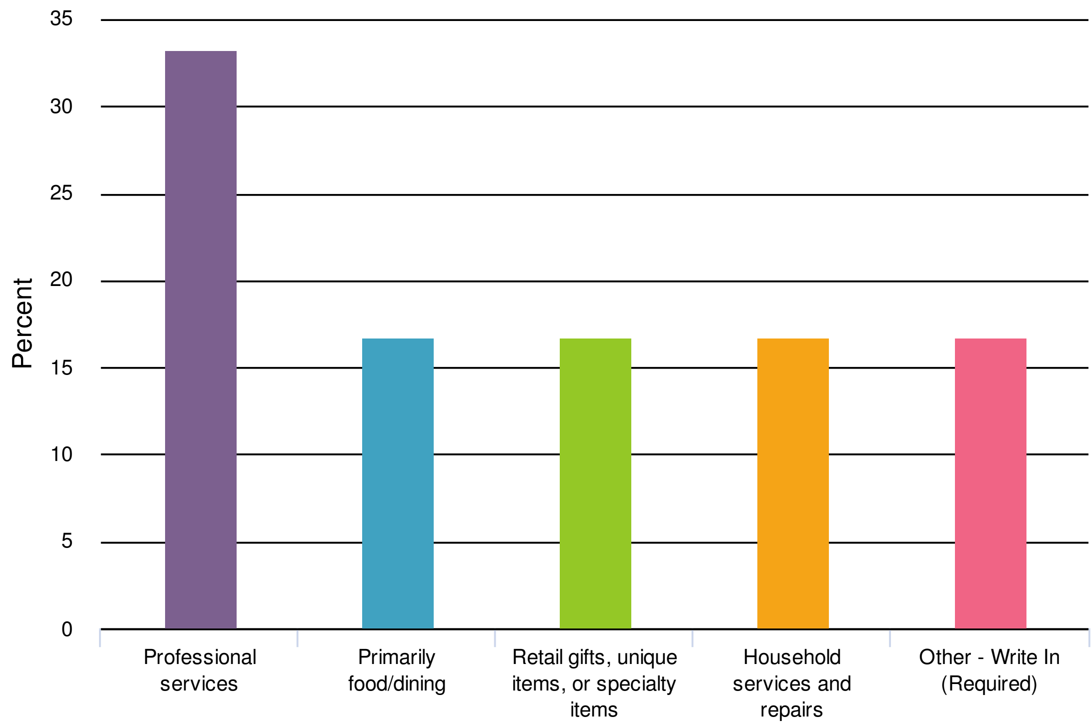
Is your other business(es) one of multiple locations or a chain?



Value		Percent	Responses
No		54.5%	6
Yes		45.5%	5

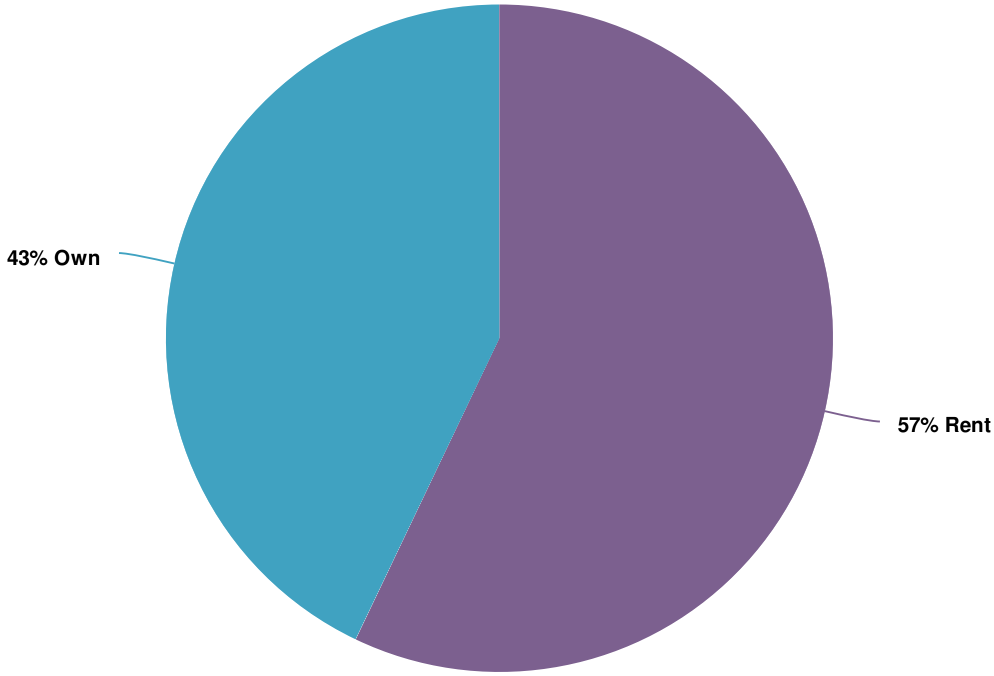
Totals: 11

What type of business best describes your other business(es)? If more than one, check all that apply.



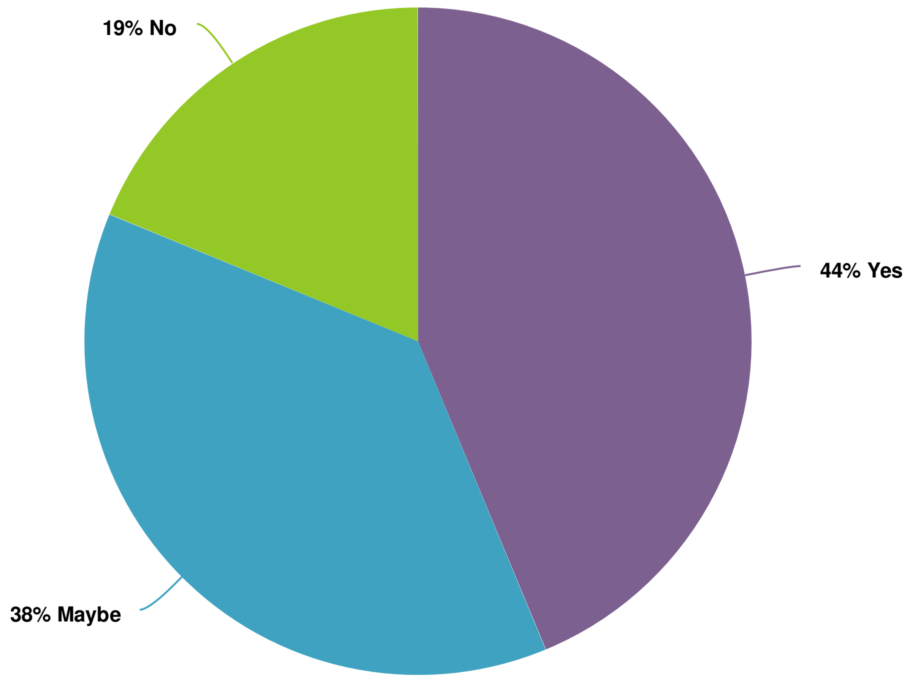
Value		Percent	Responses
Professional services		33.3%	2
Primarily food/dining		16.7%	1
Retail gifts, unique items, or specialty items		16.7%	1
Household services and repairs		16.7%	1
Other - Write In (Required)		16.7%	1

Do you own or rent the space where you run your business?



Value	Percent	Responses
Rent	57.1%	16
Own	42.9%	12
		Totals: 28

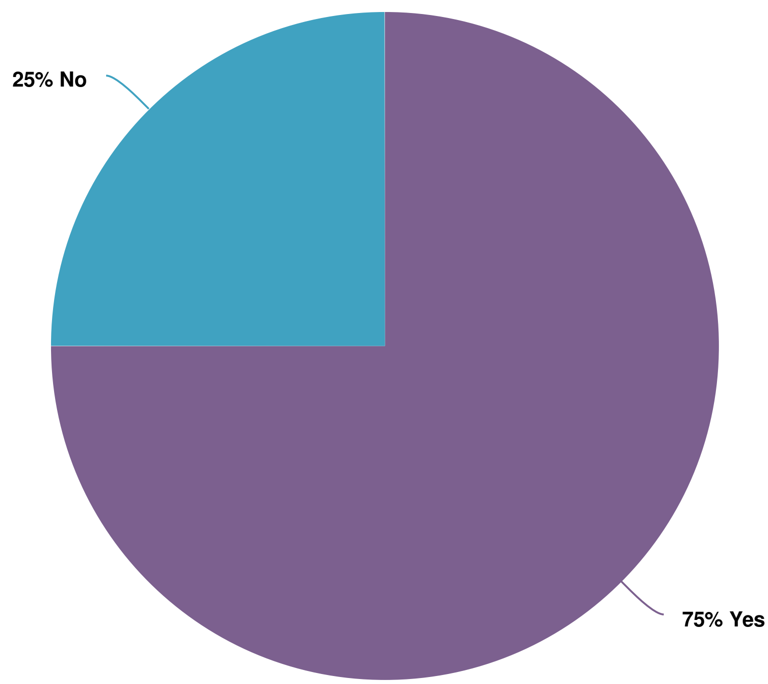
Would you like to own a space to run your business now or in the future?



Value		Percent	Responses
Yes		43.8%	7
Maybe		37.5%	6
No		18.8%	3

Totals: 16

Are you satisfied with your current space?

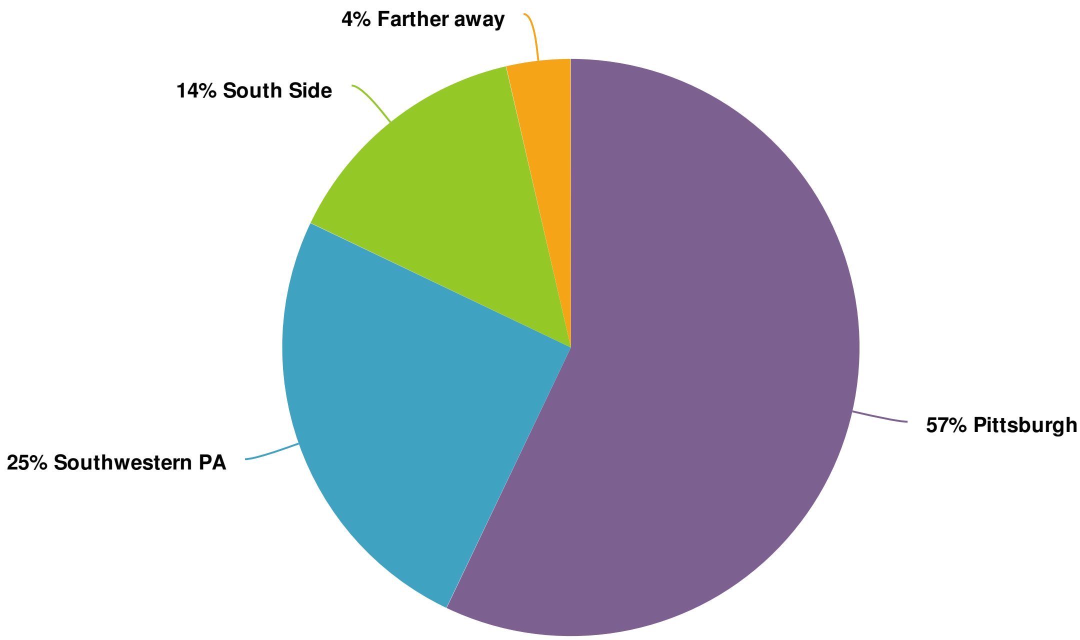


Value		Percent	Responses
Yes		75.0%	21
No		25.0%	7
			Totals: 28

Roughly what percentage of your business comes from the following?

	N/A	Up to 25%	25% - 50%	50% - 75%	More than 75%	Responses
In-person visits (for restaurants, dine-in visits) Count Row %	5 17.9%	5 17.9%	1 3.6%	2 7.1%	15 53.6%	28
Online or phone orders (for restaurants, takeout, food delivery, and catering) Count Row %	13 46.4%	9 32.1%	3 10.7%	3 10.7%	0 0.0%	28
Wholesale Count Row %	24 85.7%	4 14.3%	0 0.0%	0 0.0%	0 0.0%	28
Totals Total Responses						28

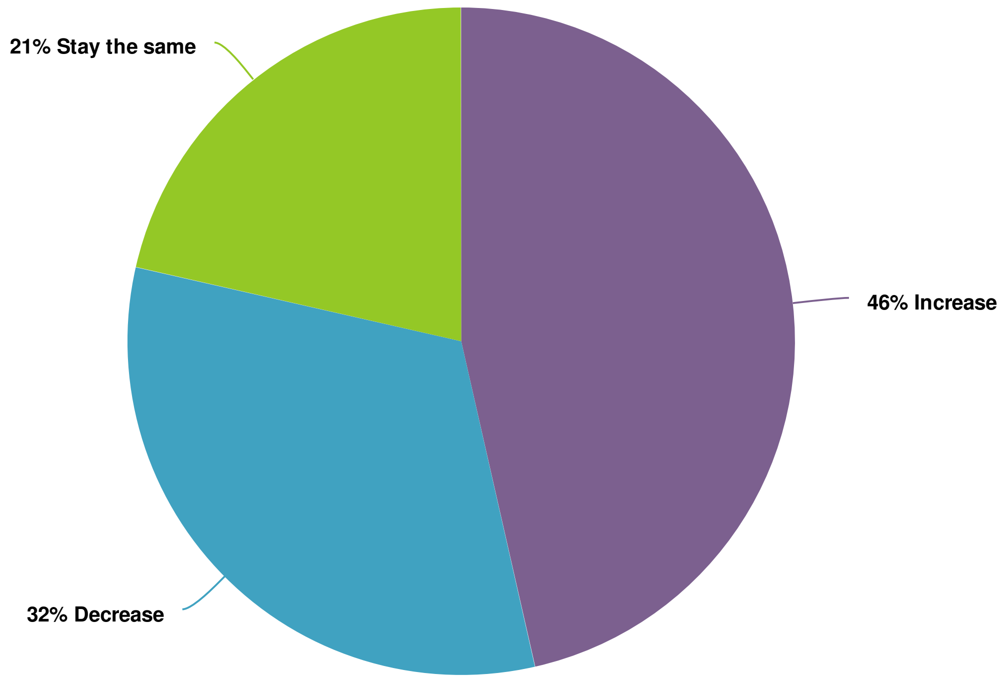
Where do most of your clients come from?



Value	Percent	Responses
Pittsburgh	57.1%	16
Southwestern PA	25.0%	7
South Side	14.3%	4
Farther away	3.6%	1

Totals: 28

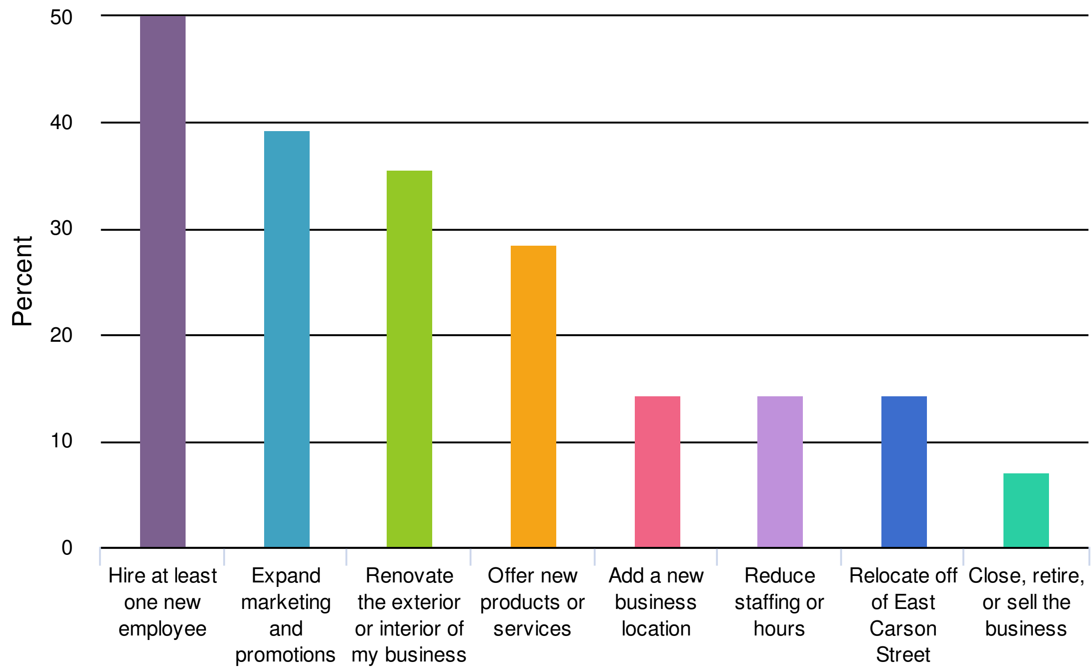
In the past year, did your revenues increase, decrease, or stay the same?



Value		Percent	Responses
Increase		46.4%	13
Decrease		32.1%	9
Stay the same		21.4%	6

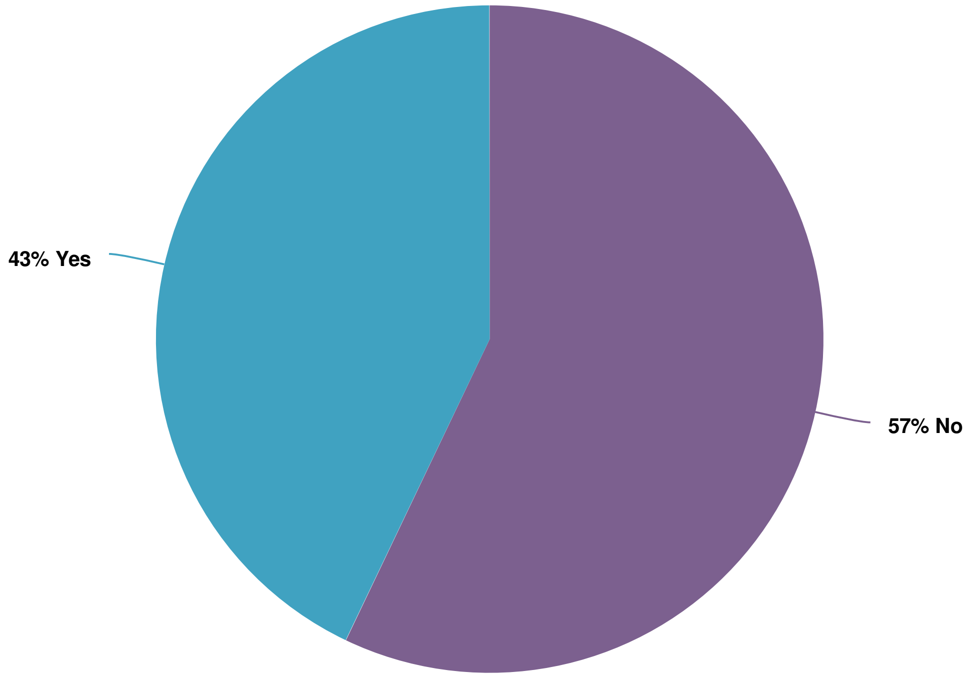
Totals: 28

In the next year, which of the following do you plan on doing? (check all that apply)



Value	Percent	Responses
Hire at least one new employee	50.0%	14
Expand marketing and promotions	39.3%	11
Renovate the exterior or interior of my business	35.7%	10
Offer new products or services	28.6%	8
Add a new business location	14.3%	4
Reduce staffing or hours	14.3%	4
Relocate off of East Carson Street	14.3%	4
Close, retire, or sell the business	7.1%	2

Do you feel that there is a common identity shared by businesses on East Carson Street?

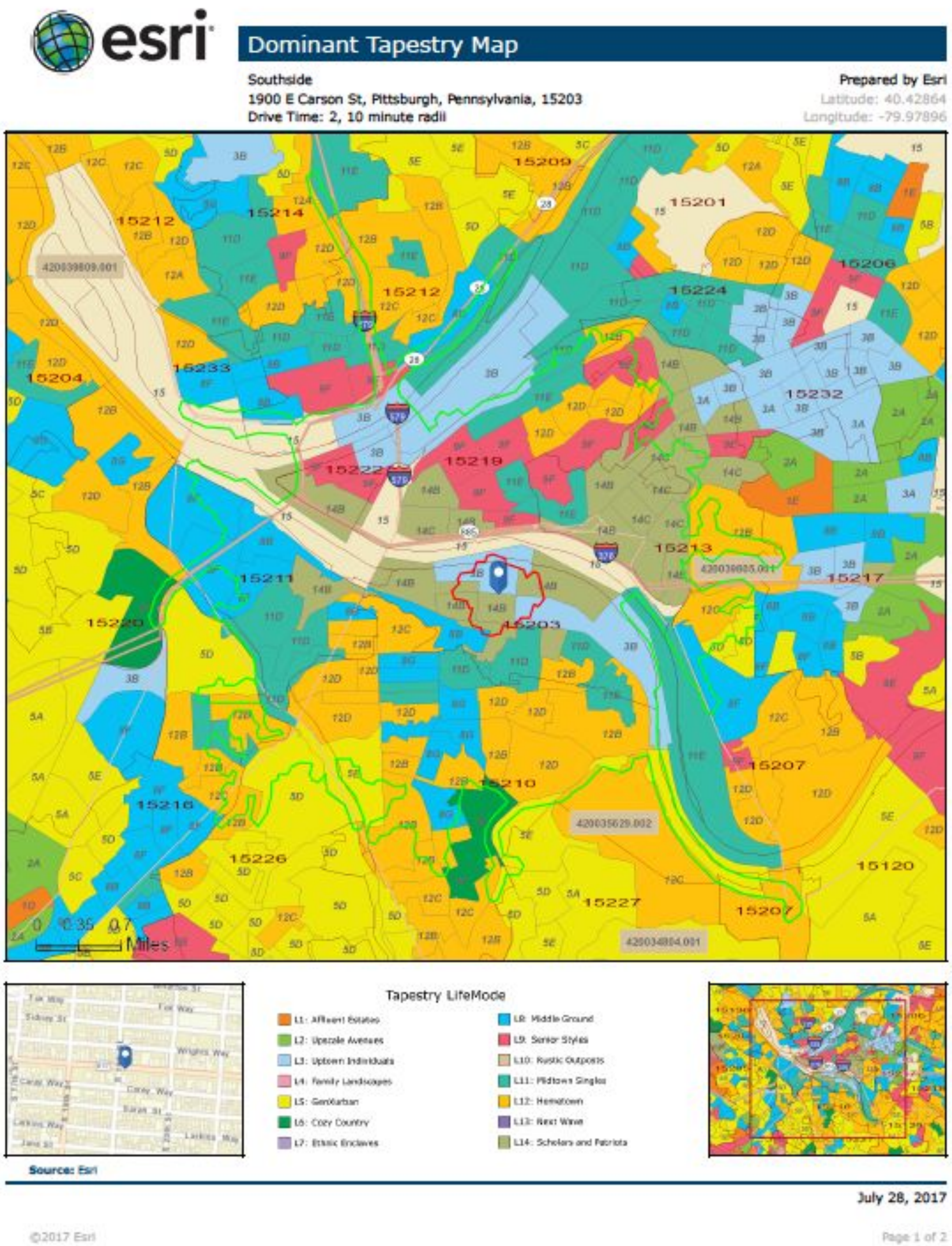


Value		Percent	Responses
No		57.1%	16
Yes		42.9%	12

Totals: 28

A2. ESRI Tapestry Segmentation

- Map from URA



- College towns: http://www.esri.com/~/media/Files/Pdfs/data/esri_data/pdfs/tapestry-singles/55_college_towns.pdf

- Metro renters: http://www.esri.com/~/media/Files/Pdfs/data/esri_data/pdfs/tapestry-singles/27_metro_renters.pdf

Tapestry™ Segmentation

Esri's **Tapestry™ Segmentation** system divides U.S. residential areas into 65 distinctive segments based on socioeconomic and demographic characteristics to provide an accurate, detailed description of U.S. neighborhoods. **Tapestry Segmentation** can help you to identify your best markets, find the most profitable consumer types, tailor marketing messages to fit your audience, and define product and service preferences. Here's a brief description of a Tapestry segment.

55—College Towns

Segment Code—55
Segment Name—College Towns
LifeMode Summary Group—L6 Scholars and Patriots
Urbanization Summary Group—U6 Urban Outskirts II

Demographic

With a median age of 24.4 years, *College Towns* is the third youngest of all the Tapestry segments. Most residents are aged between 18 and 34 years and live in single-person or shared households. One-fourth of households are occupied by married-couple families. The race profile of this market is somewhat similar to the U.S. profile. Approximately three-fourths of the residents are white.

Socioeconomic

College Towns residents are focused on their education; 59 percent are enrolled in college or graduate school. After graduation, other residents stayed on to teach or do research. Because many students only work part-time, the median household income of $28,645 ranks near the low end. Fifty-two percent of the employed residents work part-time. This segment ranks second to the *Dorms to Diplomas* segment for the highest proportion of part-time employment. Most of the employed residents work in the service industry, holding on- and off-campus jobs in educational services, health care, and food preparation.

Residential

One in seven *College Towns* residents lives in a dorm on campus. Students in off-campus housing live in low-income apartment rentals. Twenty-five percent of housing is owner occupied, typically by town residents, who live with their families in single-family dwellings. One-third of the housing is single-family structures. The median home value in these neighborhoods is $164,371.

Preferences

Convenience and speed dictates food choices; they usually buy ready-made meals, eat out, or order fast-food. With their busy lifestyles, they frequently eat out or order in from fast-food restaurants, particularly McDonald's, Wendy's, and pizza outlets during the week; however, many cook at home over the weekend. They buy books online and in stores. They have student loans and bank online or by ATM. They own laptops or expensive desktop computers with the peripherals to match. Connecting to the Internet is essential; they go online to research assignments, look for jobs, check e-mail, and download music. Keeping in touch is also important; they buy and use cell phones and accessories.

Many residents buy bedding, bath, cooking products, and small appliances such as a microwave or upright vacuum cleaner. They rank high for participating in nearly every outdoor sport and athletic activity.

College Towns residents attend country music and rock concerts and college basketball and football games, play pool, and go to movies and bars. They also participate in public activities including fund-raising and volunteer work. They usually listen to alternative music on their MP3 players, tune in to public radio, and watch MTV and Comedy Central on cable TV. They shop at discount stores but prefer to buy branded clothes from Old Navy, Gap, and Target.

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Tapestry™ Segmentation

Esri's **Tapestry™ Segmentation** system divides U.S. residential areas into 65 distinctive segments based on socioeconomic and demographic characteristics to provide an accurate, detailed description of U.S. neighborhoods. **Tapestry Segmentation** can help you to identify your best markets, find the most profitable consumer types, tailor marketing messages to fit your audience, and define product and service preferences. Here's a brief description of a Tapestry segment.

27—Metro Renters

Segment Code—27
Segment Name—Metro Renters
LifeMode Summary Group—L4 Solo Acts
Urbanization Summary Group—U1 Principal Urban Centers I

Demographic

Young, educated singles, residents of *Metro Renters* neighborhoods are just beginning their professional careers in some of the largest U.S. cities such as New York, Chicago, and Los Angeles. Residents will sometimes share housing with a roommate to help defray the cost of their high rent. Households are either single person or shared. The median age of 32.7 years is younger than the U.S. median of 37.6 years. Approximately 30 percent are in their 20s; 14 percent are in their early 30s. This younger population is also more diverse than the U.S. population. Eleven and a half percent of the residents are Asian.

Socioeconomic

The median household income is $52,643. Approximately 60 percent of employed residents work in professional and management occupations, most in the service industry sector. One of Tapestry Segmentation's most educated markets, more than one in four *Metro Renters* residents aged 25 years or older holds a graduate degree; one in three has earned a bachelor's degree. More than 80 percent of these residents have attended college; 17 percent are still enrolled in undergraduate or graduate school.

Residential

Metro Renters neighborhoods are found in the largest metropolitan centers across the U.S., with the highest concentrations in California, New York, and Illinois. Approximately 90 percent of the housing is apartments; 37 percent in high-rise buildings. The median home value is $322,154.

Preferences

Because they rent, "home and hearth" products are low priority, although they will buy new furniture from stores such as Crate & Barrel or Pier One Imports. Most of them have renter's insurance. They buy clothes and other merchandise from traditional stores or online from favorites such as Banana Republic, Gap, Nordstrom, amazon.com, and barnesandnoble.com.

Active *Metro Renters* residents work out regularly at clubs, play tennis and volleyball, practice yoga, ski, and jog. They go dancing, visit museums, attend classical or rock concerts, go to karaoke nights, the movies, eat out, and travel overseas and domestically. They read two or more daily newspapers; history books; and airline, fashion, epicurean, travel, and business/finance magazines. They listen to alternative, jazz, classical music, all-news, and public radio. They seldom watch TV; only news programs and movies.

They go online frequently to look for jobs, make travel arrangements, download music, research real estate, watch videos, and shop. Many buy their PCs online; they prefer laptops, although many also own PDAs. Politically, these neighborhoods are liberal.

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