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January 12, 1999

Dear Downtown Constituent:

Enclosed is the Interim Report of the 1998 Downtown Employee Survey and additional Downtown Business and Employment information. We are very pleased with the results so far and think this information will help us attract employers, retailers and residents to downtown Buffalo.

The Interim Downtown Employee Survey will now be further analyzed by the City of Buffalo Division of Planning, the Greater Buffalo-Niagara Regional Transportation Council and Buffalo Place Inc. A final report with an expanded information will be available later this winter.

Please let us know if any specific comparisons would be helpful to you and we will include them in the final report. Contact Debra Chernoff, Manager of Planning, or Joanne Loughry, Planner/Retail Development Coordinator, at 856-3150 for further information. The 1998 Downtown Employee Survey report can also be viewed on the Greater Buffalo Niagara Regional Transportation Council web site @GBNRTC.org .

Very truly yours,

Michael T. Schmand  
Executive Director

Enclosures:

MTS:dw

3M-9





## **DOWNTOWN BUFFALO BUSINESS AND EMPLOYMENT TRENDS**

### **Introduction**

Over the last year Buffalo Place Inc. conducted an inventory of all downtown businesses and employers. Our purpose was to determine definitively the number of employees and businesses located in the downtown area, and to collect a database necessary for further demographic and opinion survey of downtown employees. Reliable information on the number and characteristics of downtown employees has not been available since 1987, and it is often requested by businesses considering a downtown Buffalo location for retail, employment and residential development.

The City of Buffalo, The Greater Buffalo-Niagara Regional Transportation Council (GBNRTC) and Buffalo Place Inc. agreed to work together on this project. This first piece, completed by Buffalo Place, was needed for GBNRTC and Buffalo Place to conduct a demographic and attitudinal survey of 6,000 downtown employees, which was completed in June of 1998. GBNRTC analyzed the results and will make an initial presentation on 12/16/98. The City of Buffalo provided geo-coded property information and all three agencies will be involved with further analysis of the employee survey to be completed in early 1999.

### **EMPLOYER SURVEY METHODOLOGY**

A census of downtown businesses was conducted. A listing of downtown employers was compiled from The Haines Directory, phone books, the Business First Book of Lists, property owner listings, other business listings, and on-site surveys. We then contacted each of those companies to confirm their location, type of business, the number and type of employees, occupied square footage, etc. This was an extensive effort involving over 2,000 hours of work and extensive assistance by cooperative employers, property owners and government entities.



The number of companies we were not able to survey was determined (5%), and an average number of employees per company was added to complete our estimate of downtown employment (3% added).

**Survey Area:**

The traditional **Central Business District** bounded on the North by Edward and Goodell Streets, the East by Michigan Avenue, the South by the Buffalo River and the West by Elmwood Avenue and Lower Terrace. Commercial properties on the West Side of Elmwood Avenue and Lower Terrace were also included.

This area was chosen because it has been accepted by local and regional agencies as the central business district for at least 30 years. Census tract data and previous studies can be easily compared to this area.

**FINDINGS**

The total number of employees in downtown Buffalo in 1998 is **46,700**.

The total number of businesses located in downtown Buffalo is **1,372**.

**Chart 1– Downtown Employment: By Sector**

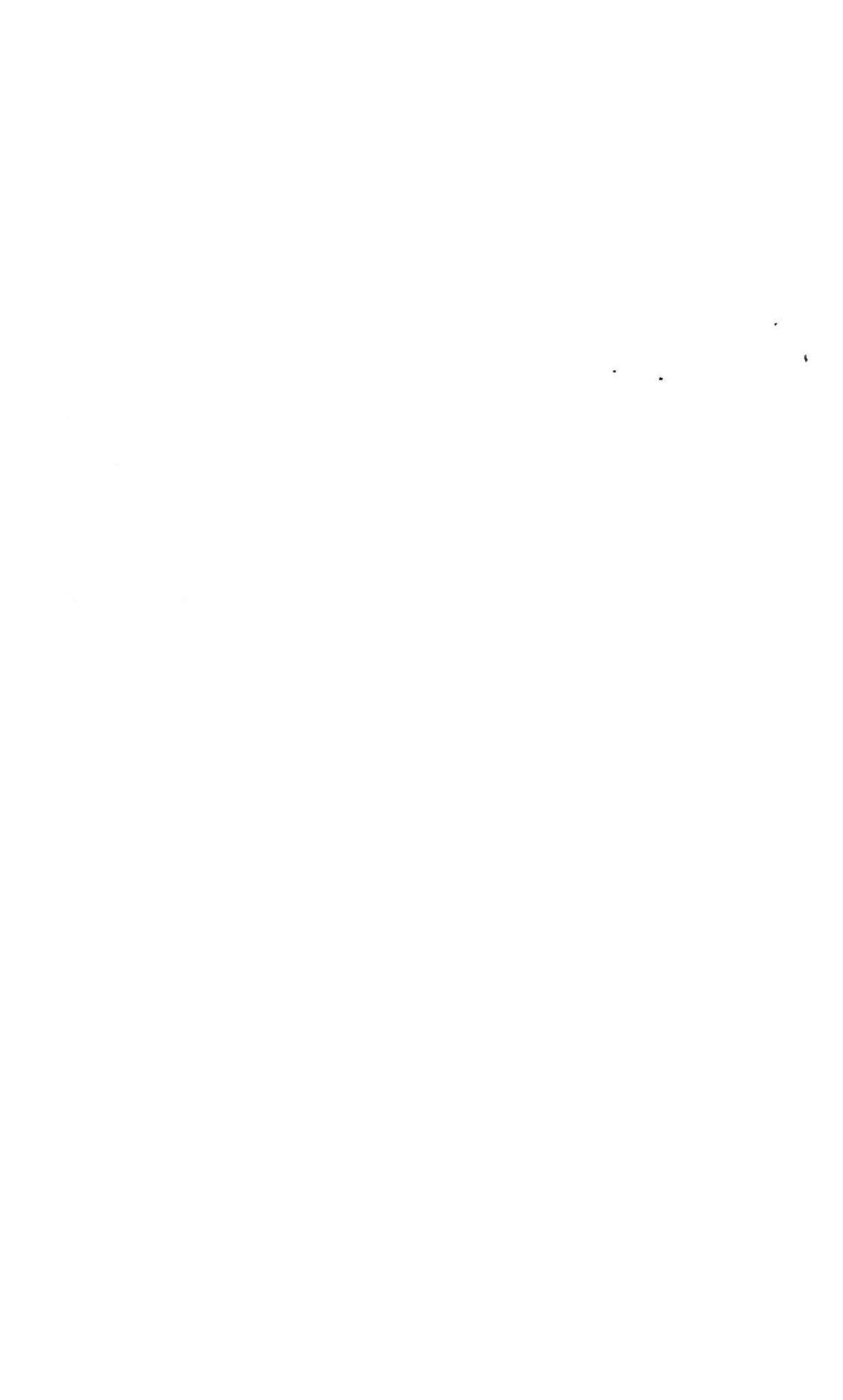
The private sector dominates downtown employment, comprising 72 percent of the total. Public sector employment makes up the remaining 28 percent, and is divided between the four major levels of government: Federal with 2,567 employees (6%), New York State with 3,653 employees (8%), Erie County the largest with 4,603 employees (10%), and the City of Buffalo with 1,924 employees (4%).

**Chart 2 – Downtown Employment: By Industry**

Downtown employment is dominated by government (28%), services (34%) and finance, insurance, real estate (f.i.r.e.) (18%). Following government, banking is the largest downtown employer with 12% of the workforce. Legal services is the third largest employer with 10% of downtown employment.

**Chart 3 – Downtown Employment: Percentage of Employees by Company Size.**

Almost half of downtown employment (47%) is at larger firms (200+ employees). Smaller companies (1 to 49 employees) employ 30% of the downtown workforce with the remaining 23 percent working at medium sized firms (50 to 199 employees)



**Chart 4 – Downtown Employment: Percentage of Firms by Number of Employees**

Although almost half of downtown workers work for large employers, small companies represent the majority of businesses (90%) in downtown Buffalo. Even more striking is the fact that 50 percent of companies downtown have between 1 and 4 employees.

**Chart 5 – Downtown Employees: Number by Size of Firm**

**Chart 6 – Downtown Employment: By District**

The Buffalo Place area tends to represent half of the downtown area. This is true for employment - 54% of the downtown workforce is in the Main Street / Buffalo Place area.

**Chart 7 – Downtown Employment: Percentage of Employees by Parking District.**

Employment is divided by the different use districts that are traditionally used to describe downtown Buffalo.

**Map 1 - Downtown Buffalo Parking Districts**

**Chart 8 - Downtown vs. Erie County: Distribution of Employment by Sector**

Downtown is clearly a regional center for government and F.I.R.E. (financial, real estate and insurance) employment. Transportation/utilities and service sector employment make up similar proportions of downtown and regional employment. The manufacturing/construction and wholesale/retail sectors provide a much larger proportion of Erie County jobs (22-27%) than downtown jobs (7%).

**Map 2 - Downtown Buffalo Central Business District: *Working Population***

**Map 3 - Downtown Buffalo Central Business District: *City Taxes Per Block***

**Map 4 - Downtown Buffalo Central Business District: *Assessed Value Per Block***

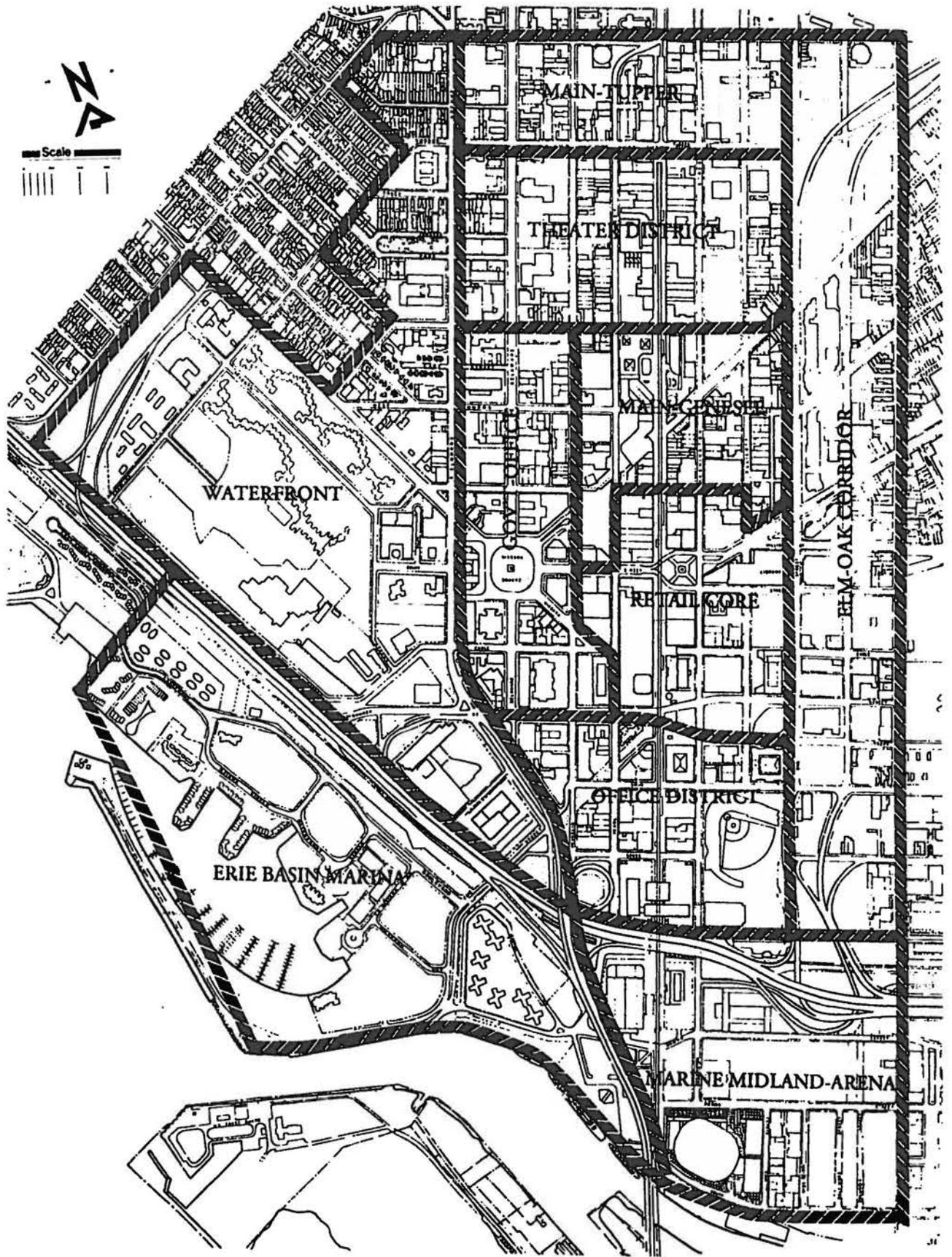
**Map 5 - Downtown Pedestrians Per Day - 1994**

**Map 6 - Downtown Lunch Time Pedestrians Per Hour - 1994**

**Chart 9 - Main Street Pedestrians Per Day: 1988 -1998**

**Chart 10 - Main Street Pedestrians: Lunchtime Hourly Average - 1988-1998**

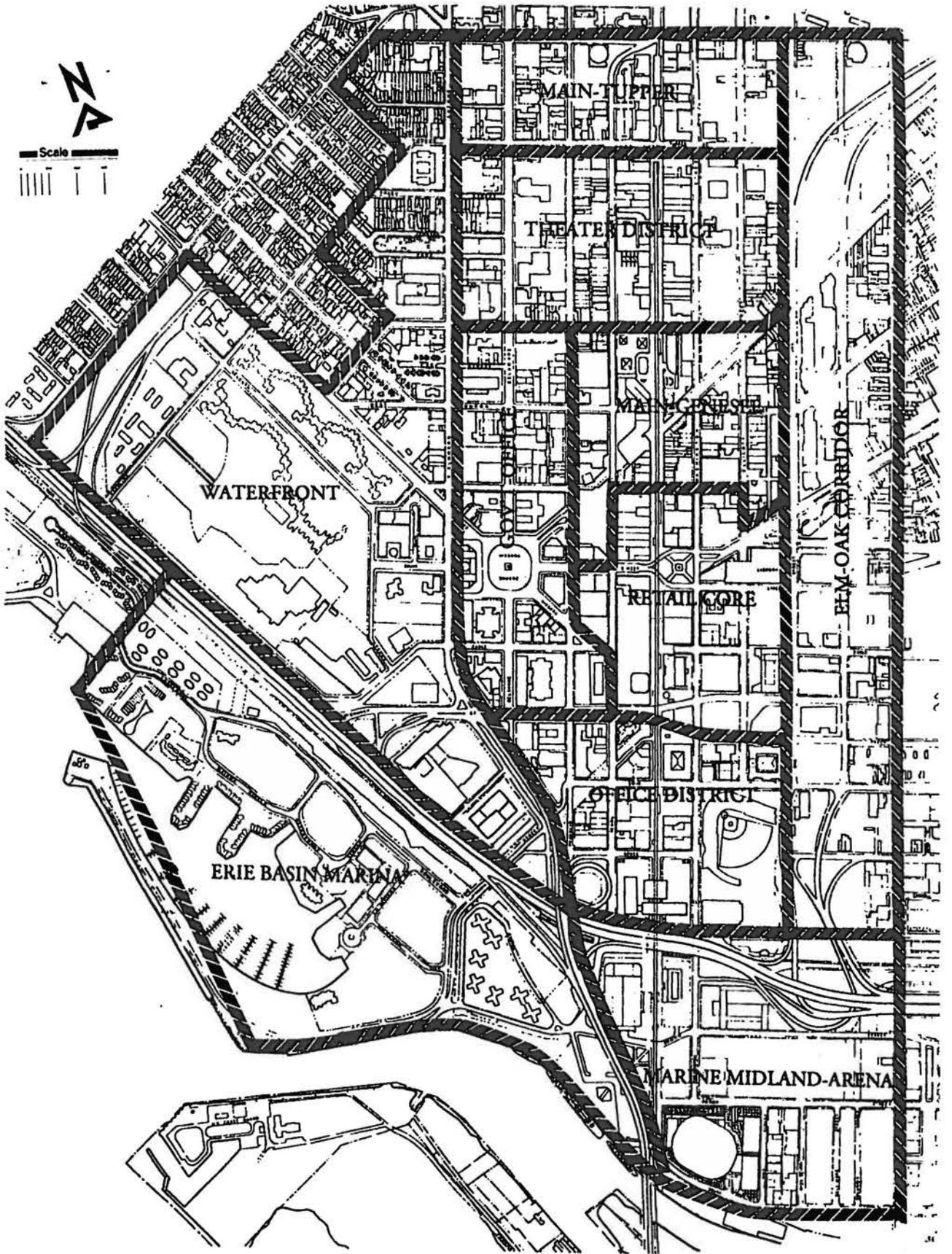




# Downtown Buffalo Parking Districts

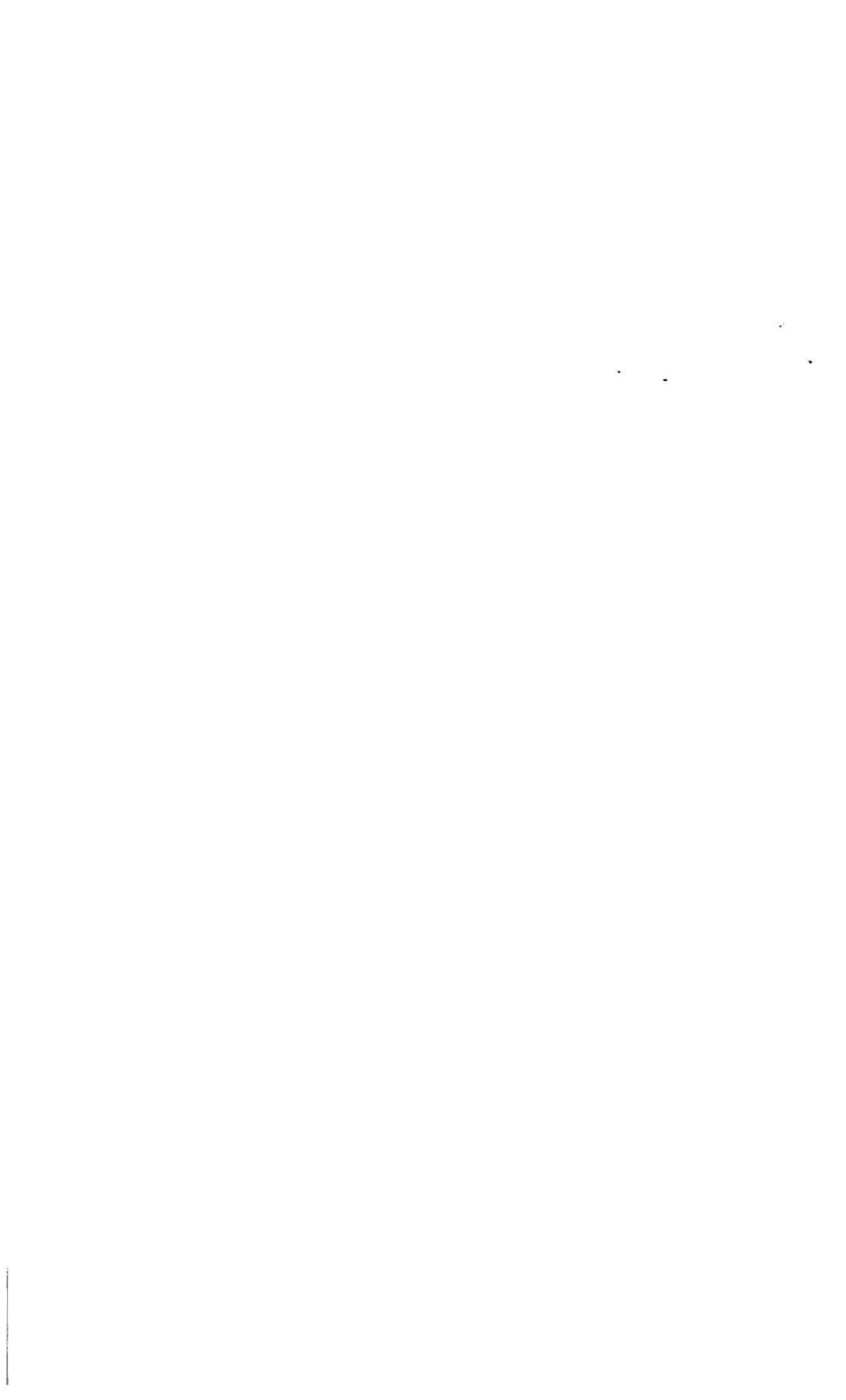
Map 1

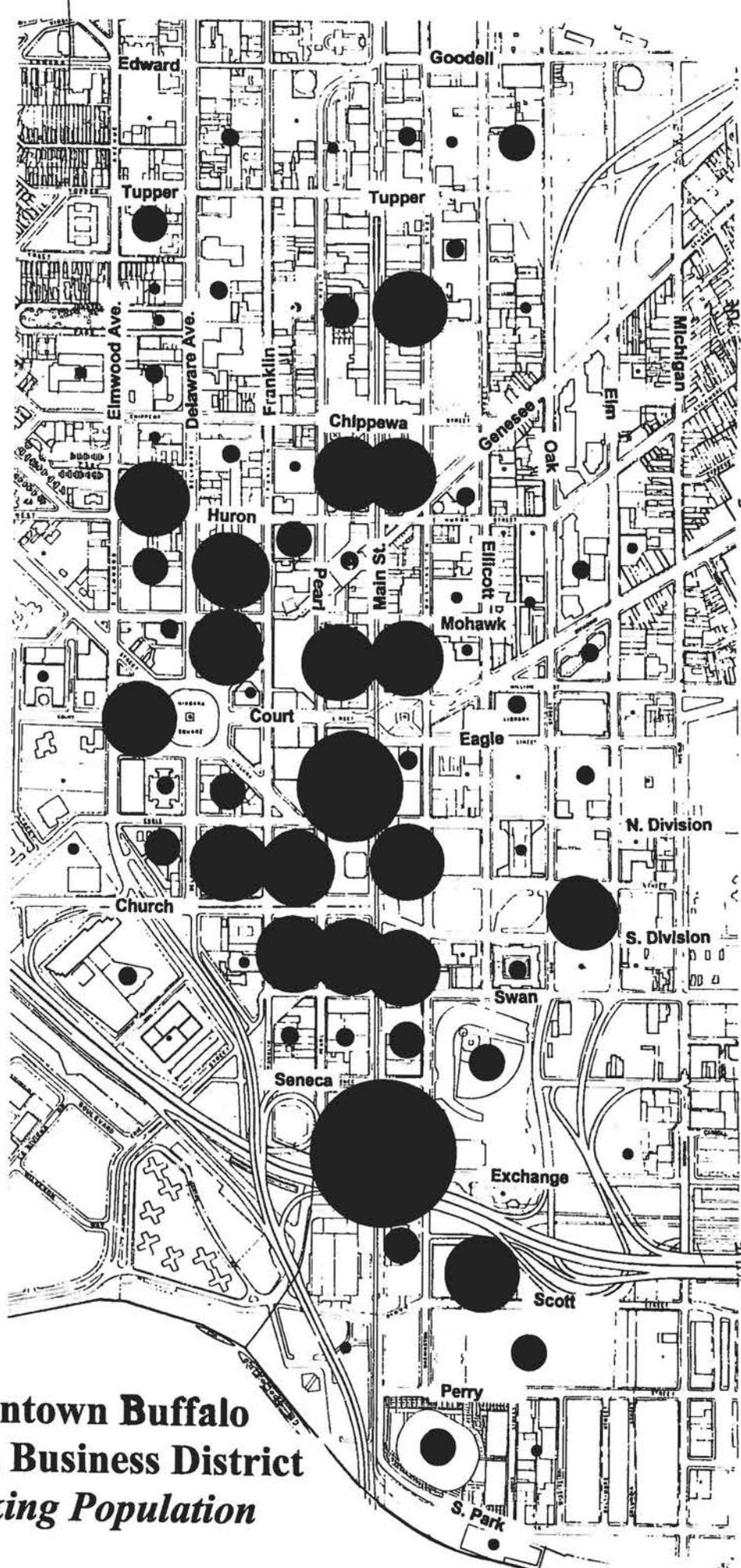




# Downtown Buffalo Parking Districts

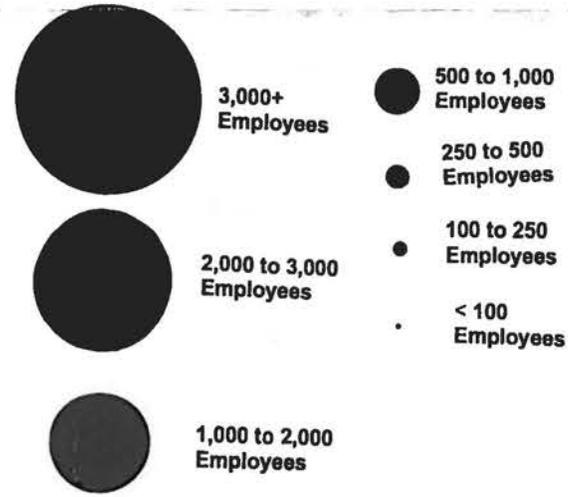
Map 1





**Downtown Buffalo  
Central Business District  
Working Population**

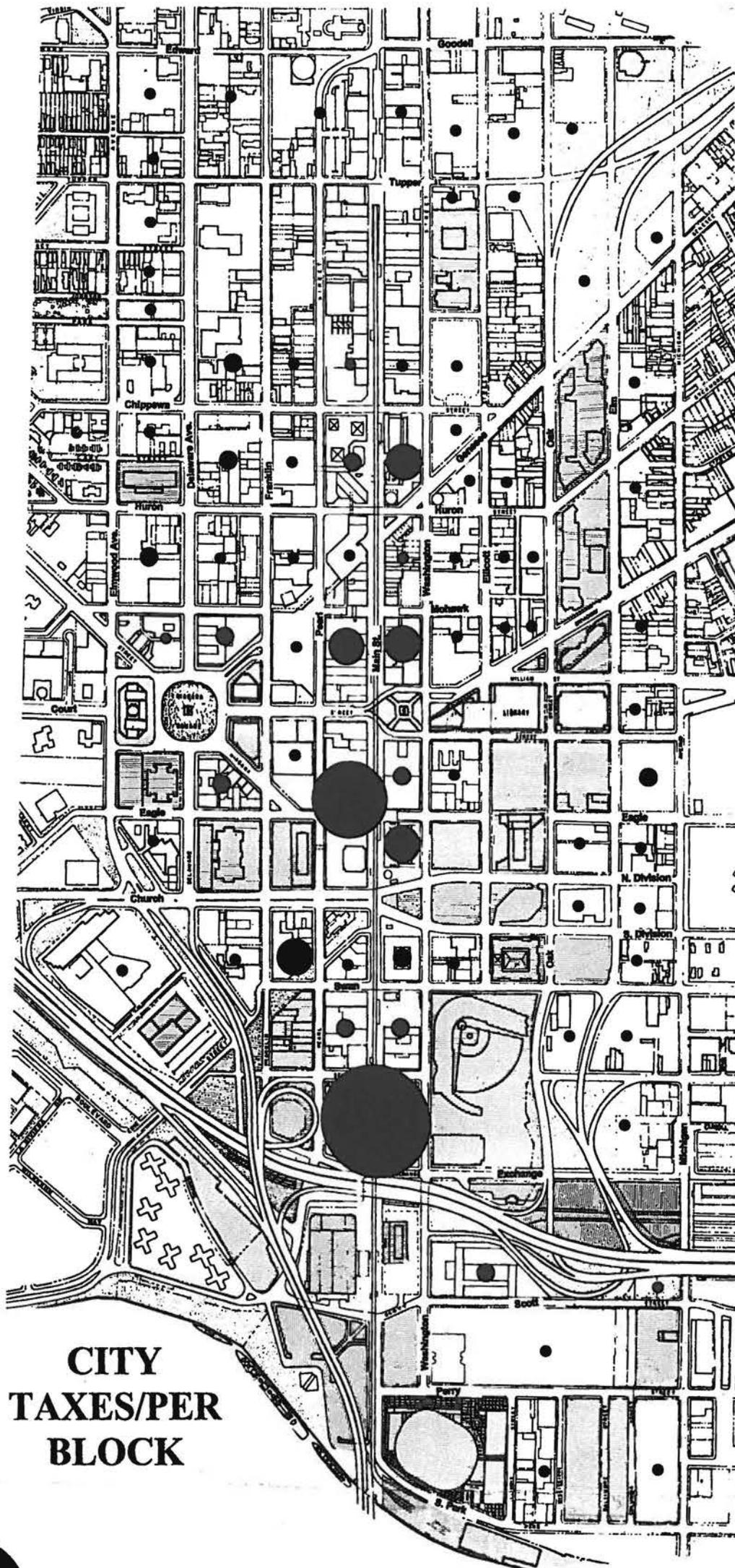
Map 2



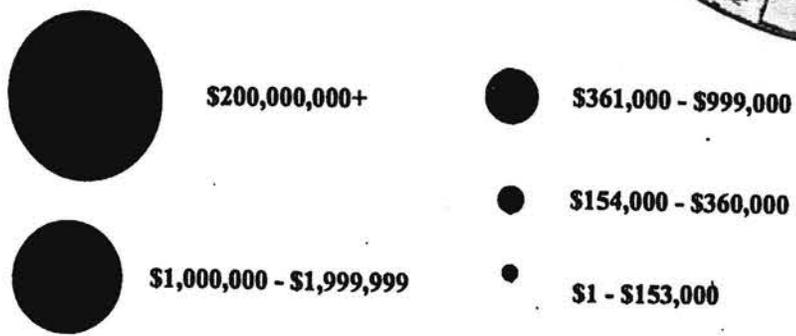
1998







**CITY TAXES/PER BLOCK**

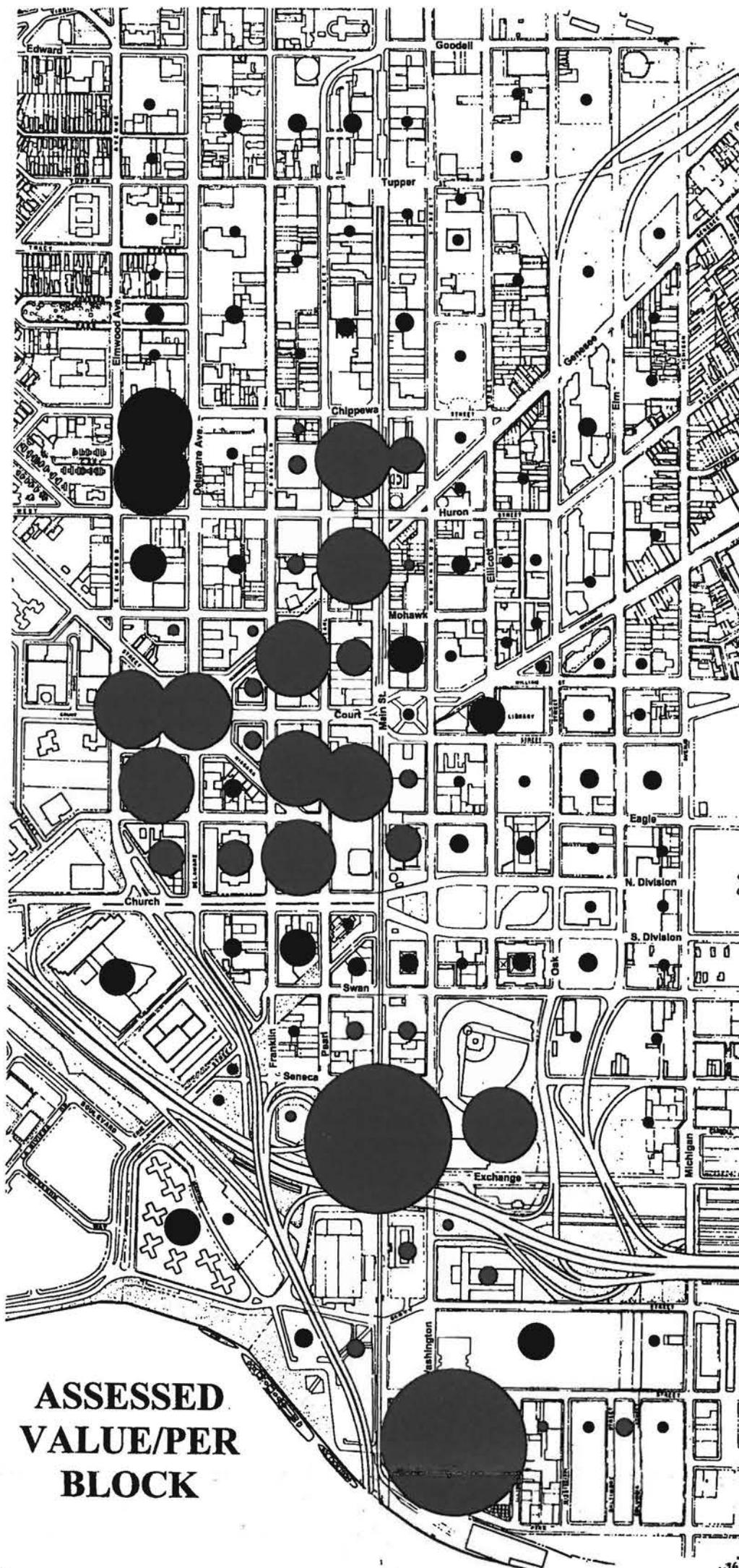


**TOTAL DOWNTOWN  
CENTRAL BUSINESS DISTRICT  
TAXES FOR 1998/99 = \$13,744,000**

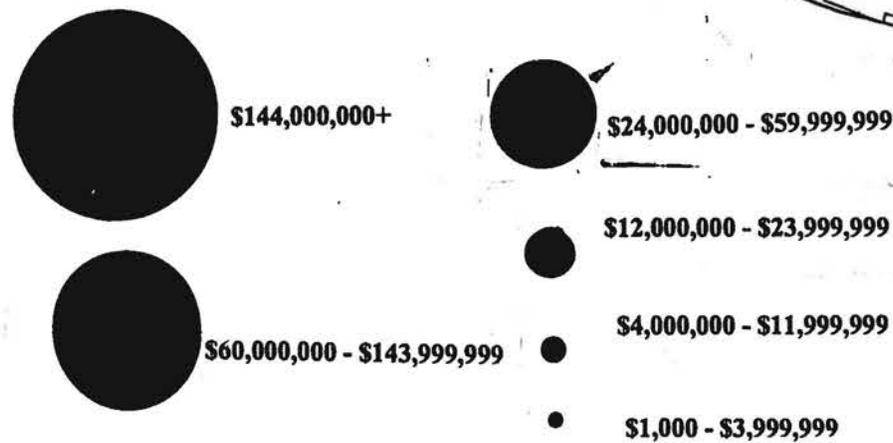
**DATA PROVIDED BY THE CITY DIVISION  
OF PLANNING**







**ASSESSED  
VALUE/PER  
BLOCK**

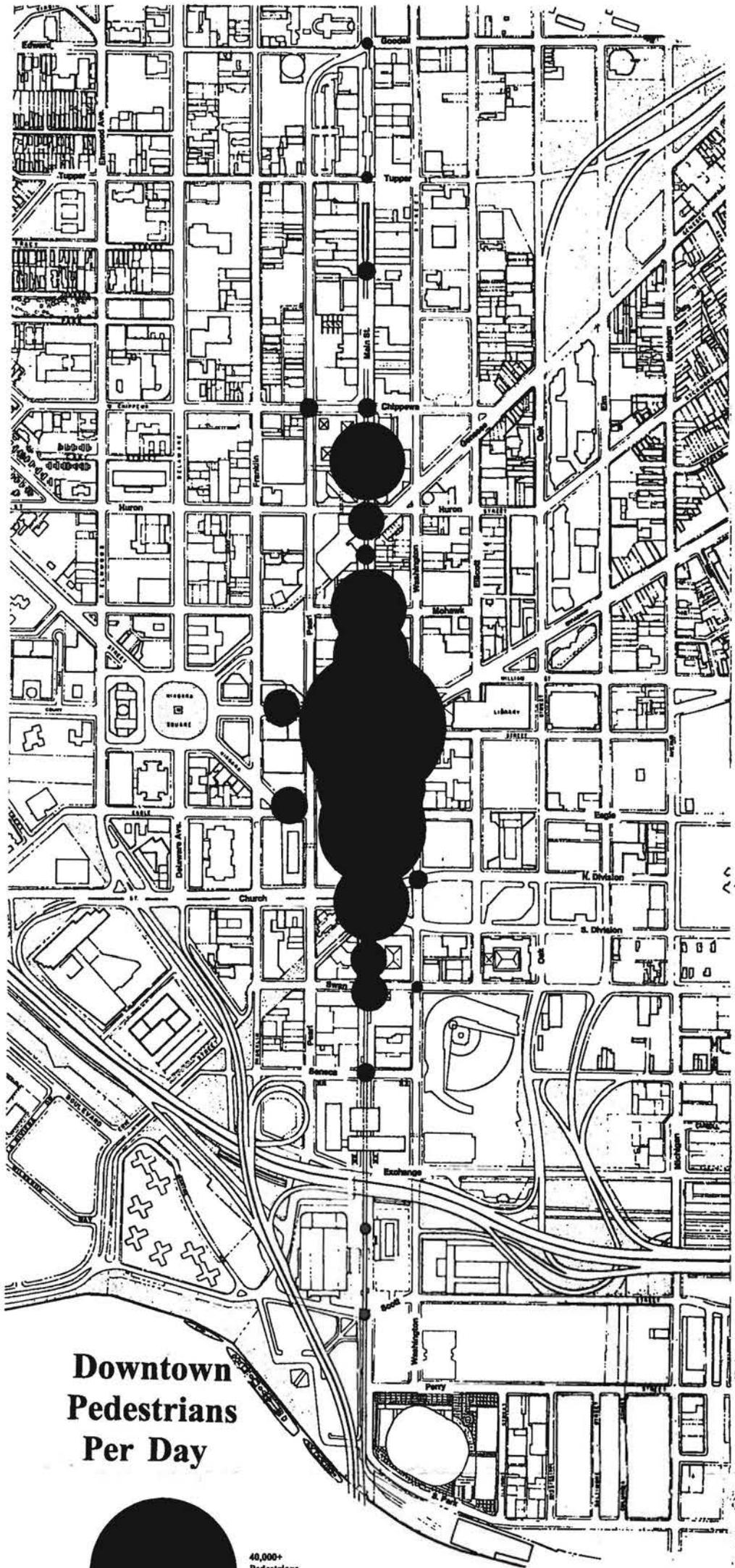


**TOTAL DOWNTOWN  
CENTRAL BUSINESS DISTRICT  
ASSESSED VALUE FOR 1998/99  
IS \$1,148,954,448**  
DATA PROVIDED BY THE CITY DIVISION  
OF PLANNING



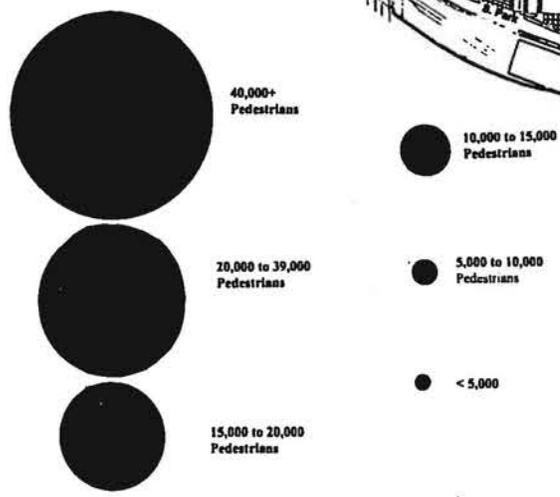
Map 4





**Downtown  
Pedestrians  
Per Day**

Map 5

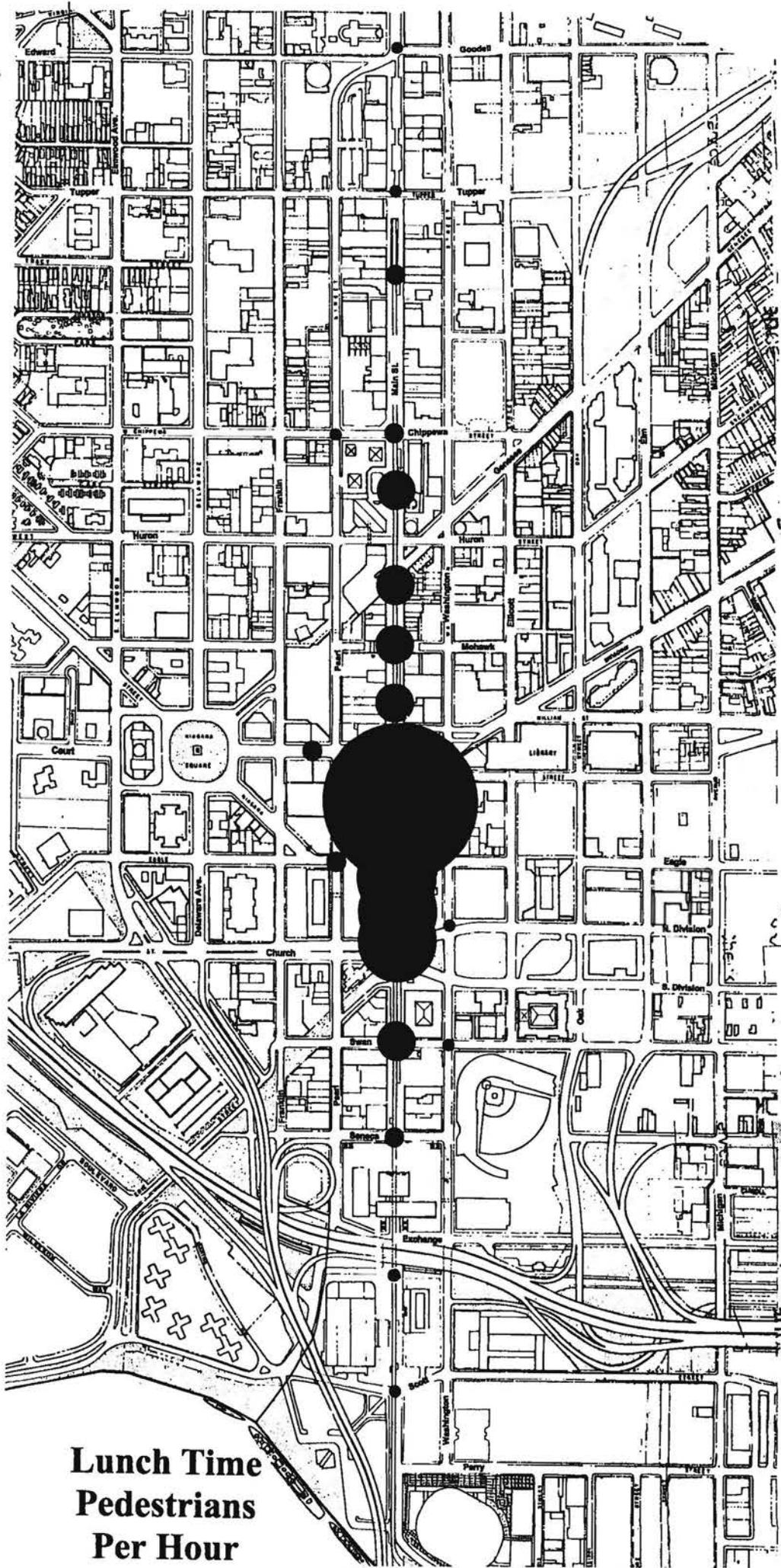


1994

Pedestrian Volume Survey  
291,906 Total Daily Trips Counted







**Lunch Time  
Pedestrians  
Per Hour**

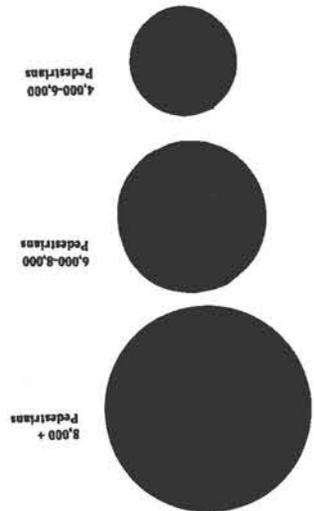
**Map 6**

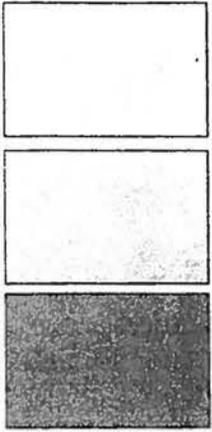


Pedestrian Volume Survey  
57,463 Total Lunch Trips Counted



-  Pedestrians < 1,000
-  Pedestrians 1,000-2,000
-  Pedestrians 2,000-4,000





# SLIDE SHOW PRESENTATION

December 16th 1998  
8:00 A.M.  
at  
Buffalo Place Inc.

1 9 9 8

THE DOWNTOWN EMPLOYEE SURVEY

**DOWNTOWN**

1998 DOWNTOWN EMPLOYEE SURVEY

**EMPLOYEE**

1998 DOWNTOWN EMPLOYEE SURVEY

**SURVEY**



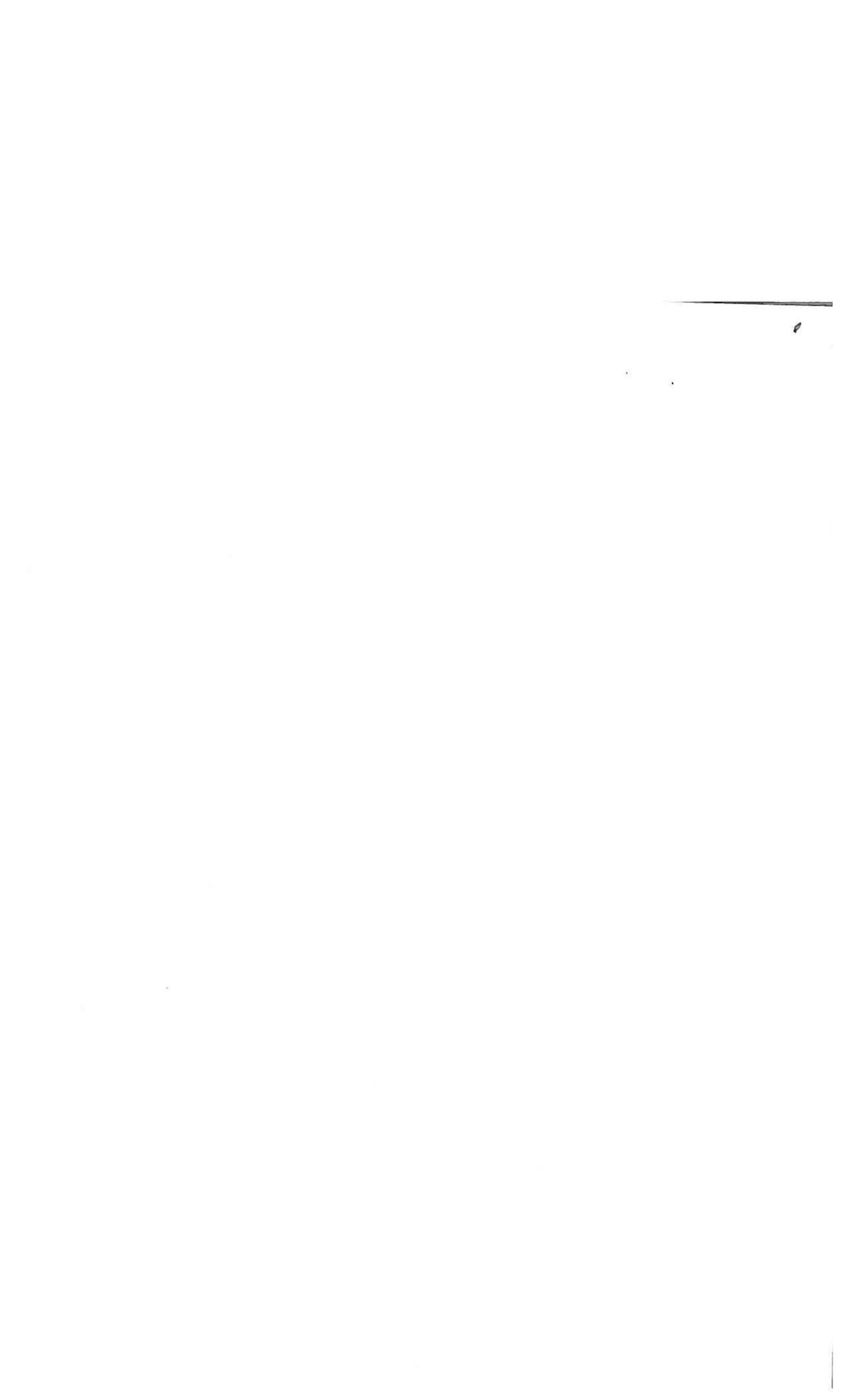
*Conducted By*

**GREATER BUFFALO-NIAGARA  
REGIONAL TRANSPORTATION COUNCIL**

*and*

**BUFFALO PLACE INC.**

*in cooperation with the City of Buffalo*



**Greater Buffalo - Niagara**

**Regional Transportation Council**

**GBNRTC**

**Charles Frederiksen**  
**Executive Director**

**The Agency Formerly Known As**

**NFTC**

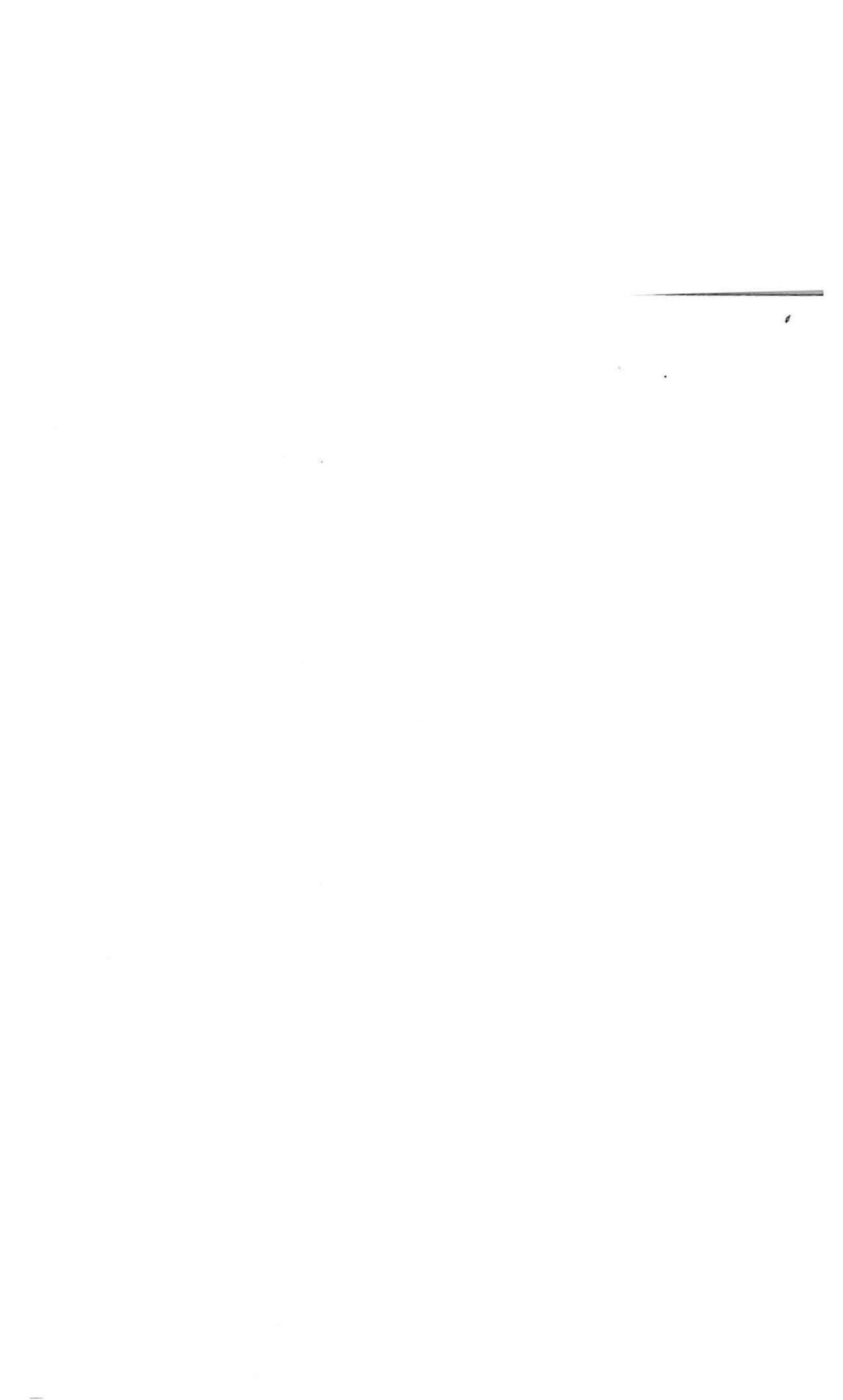




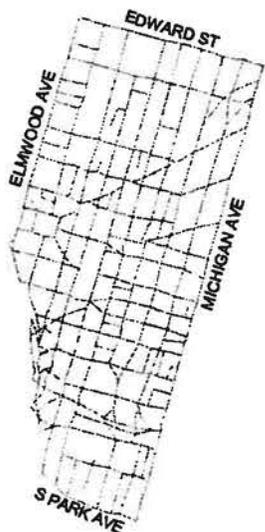
The  
**1998 Downtown  
Employee Survey**

In Cooperation With...





## Survey Area

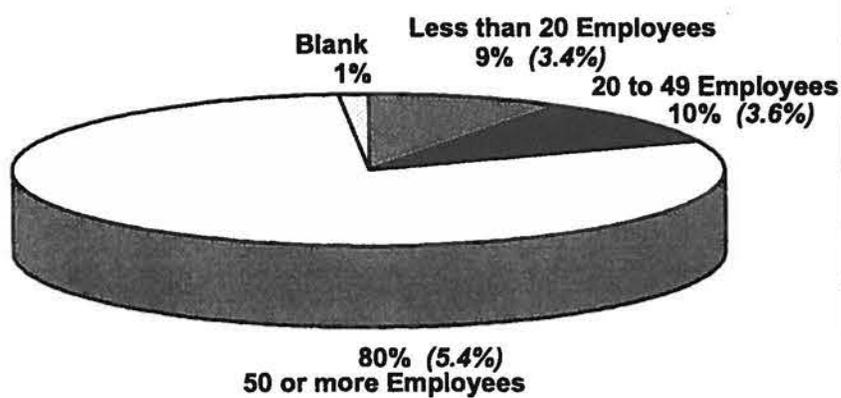


*And*

## Response Rate

- 6,200 Surveys Distributed
- 2,130 Responses
- 34% Response Rate
- Error +/- 3%

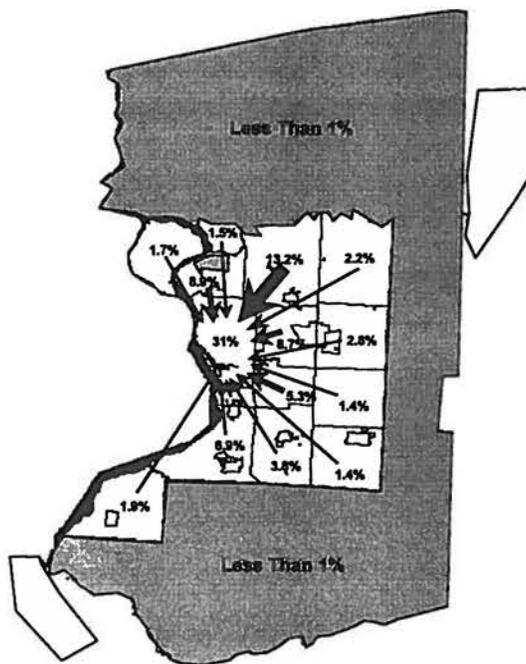
## **Survey Returns By Employer Size** *(Percentage Sampled)*



## Downtown is a Regional Employment Center

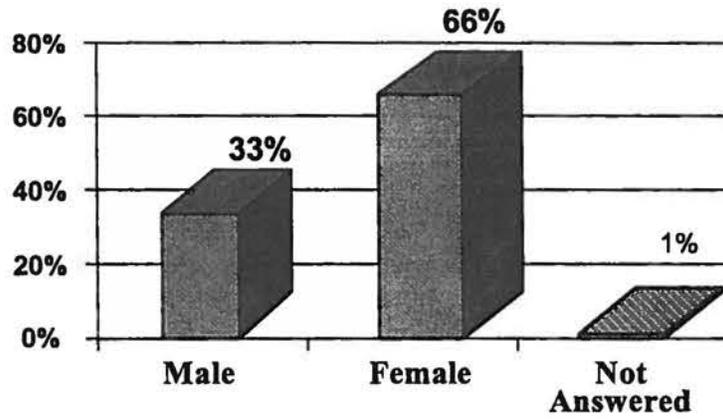
Hatchcock Location	Percent
Buffalo	31.0
Amherst	13.2
Tonawanda Town	8.9
Cheektowaga	8.7
Hamburg	6.9
West Seneca	5.3
Orchard Park	3.8
Lancaster	2.8
Clarence	2.2
Evans	1.9
Lackawanna	1.8
Grand Island	1.7
North Tonawanda	1.5
Aurora	1.4
Elma	1.4

Valid Cases: 2130



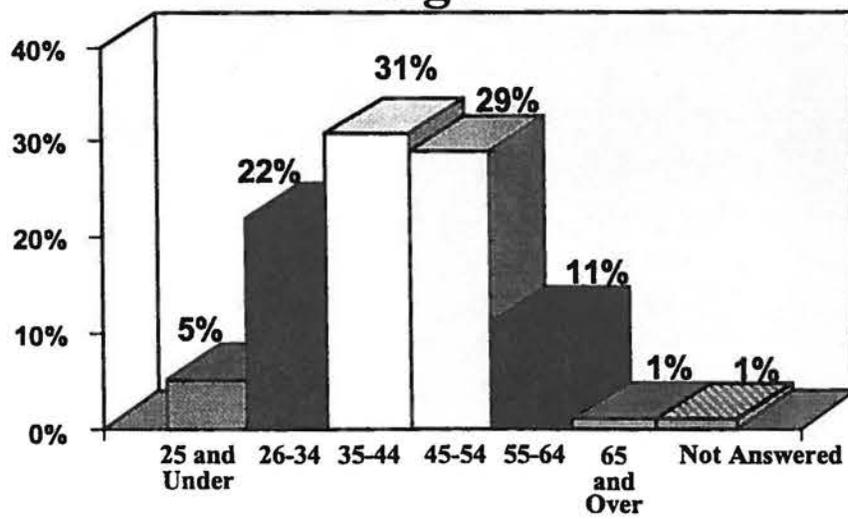
## Who's Working Downtown? *An Employee Profile*

## Who's Working Downtown Gender



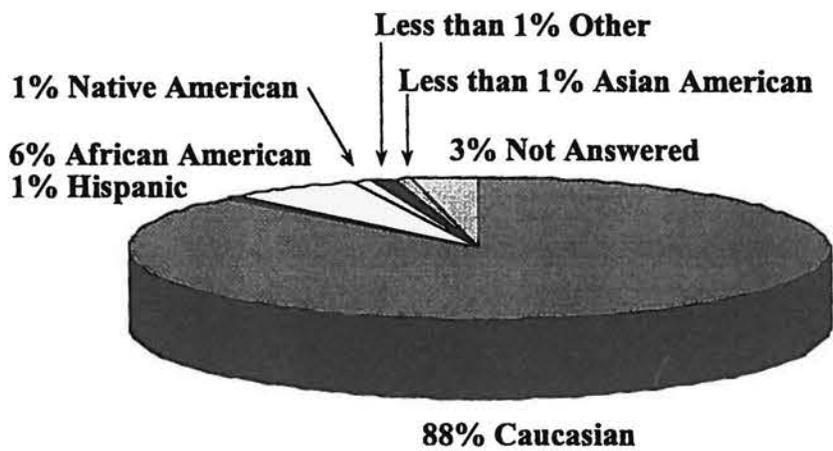
Valid cases: 2130

## Who's Working Downtown Age



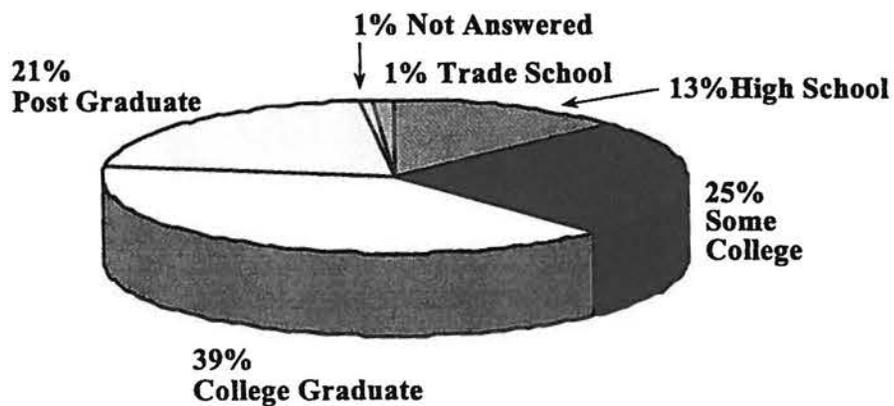
Valid cases: 2130

## *Who's Working Downtown* Ethnicity



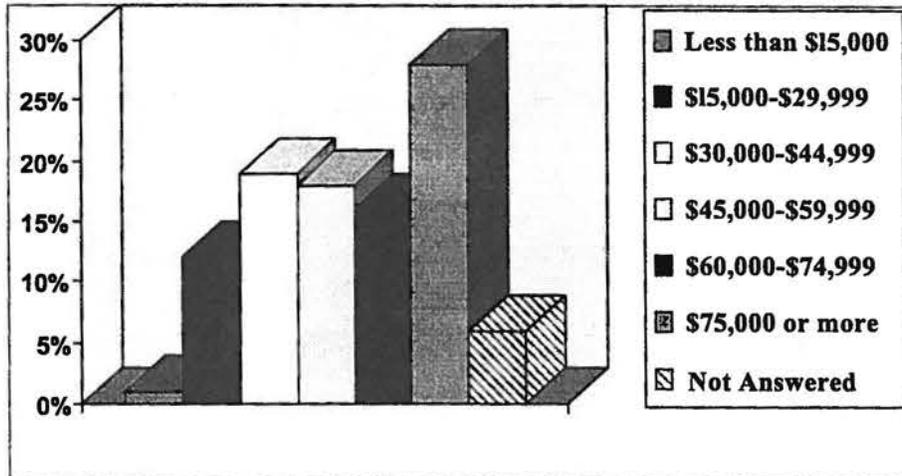
Valid cases: 2130

## *Who's Working Downtown* Education



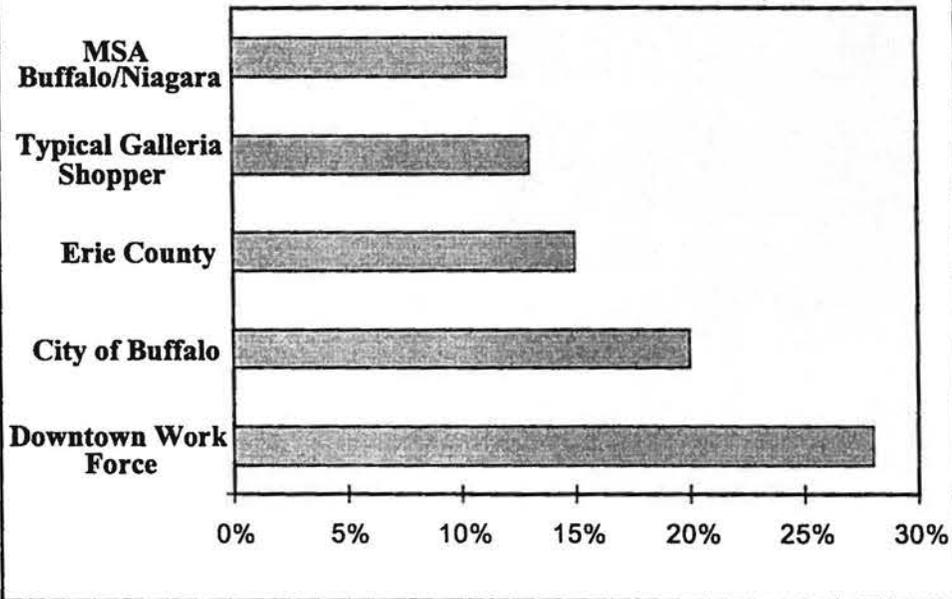
Valid cases: 2130

## Who's Working Downtown Household Income (before taxes)

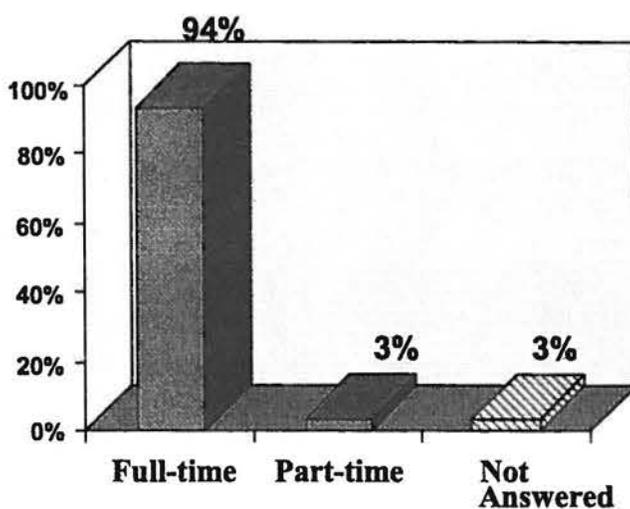


Valid cases: 2130

## Percentage of Households With Incomes Greater Than \$75,000

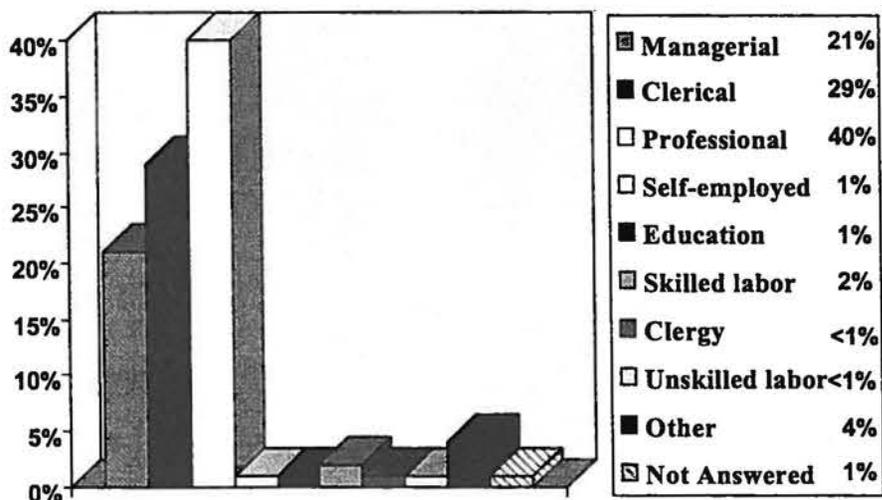


### Who's Working Downtown Full-Time or Part-Time



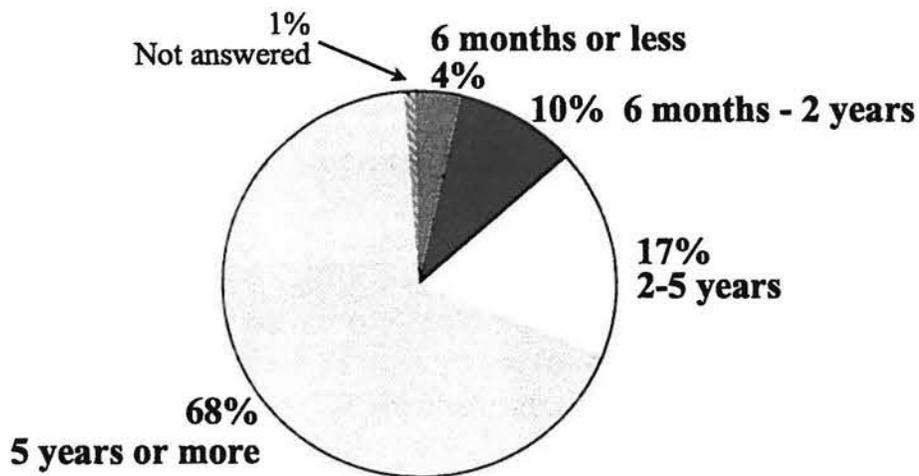
Valid cases: 2130

### Who's Working Downtown Occupation



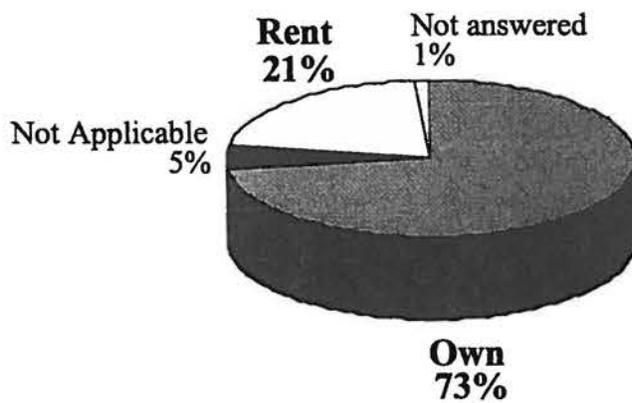
Valid cases: 2130

**Who's Working Downtown**  
**How Long Have You Worked Downtown?**



Valid cases: 2130

**Who's Working Downtown**  
**Do You Presently Own or Rent?**

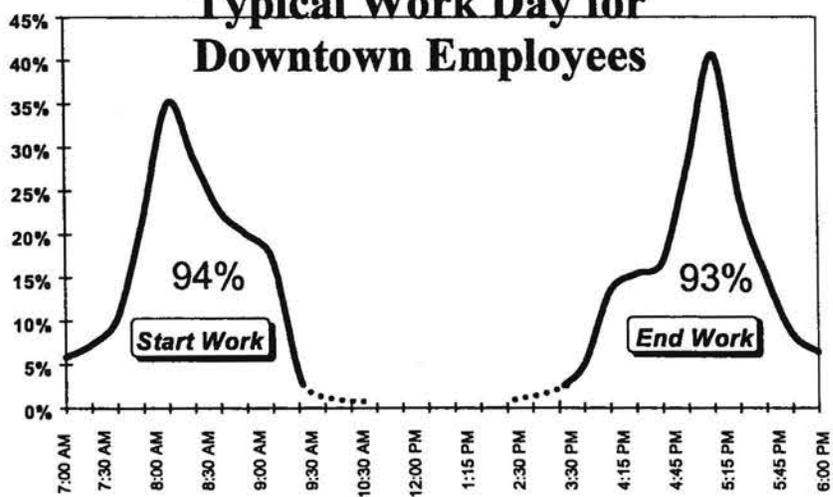


Valid cases: 2130

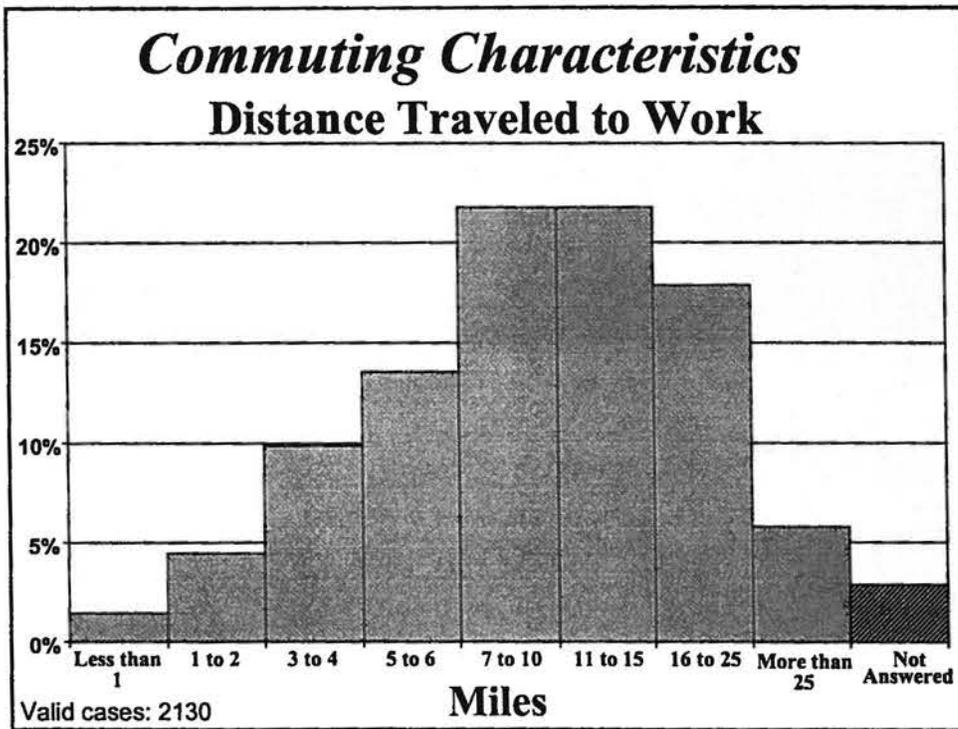
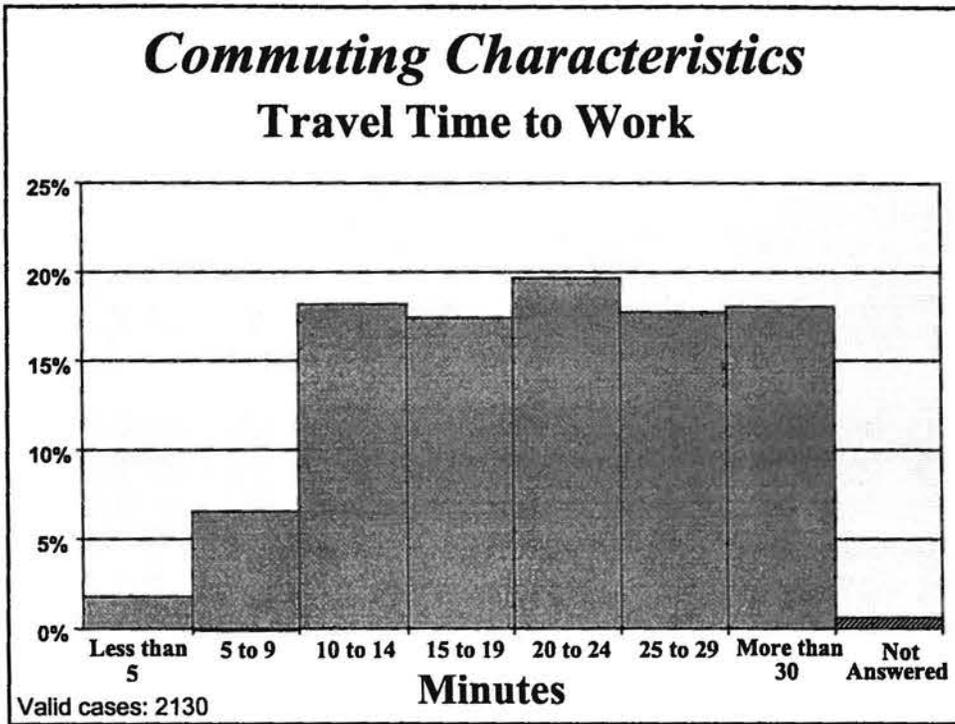
## Downtown Employee's *Commuting Characteristics*

### *Commuting Characteristics*

#### Typical Work Day for Downtown Employees

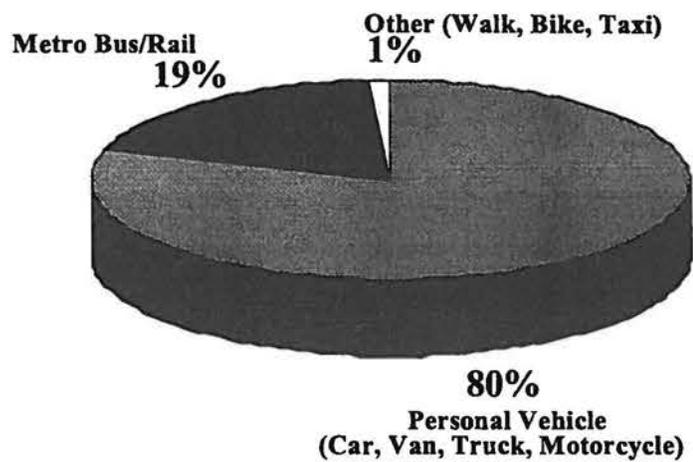


Valid cases: 2130



## *Commuting Characteristics*

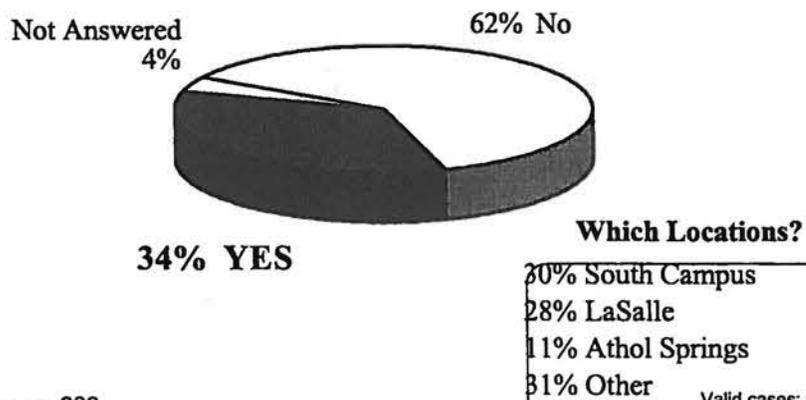
### How Did You Get To Work?



Valid cases: 2130

## *Commuting Characteristics*

### If You Take Metro, Do You Use a Park & Ride Lot?

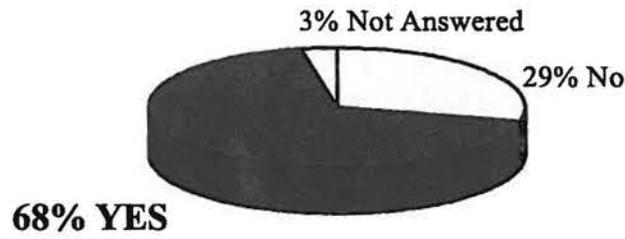


Valid cases: 308

Valid cases: 109

## Commuting Characteristics

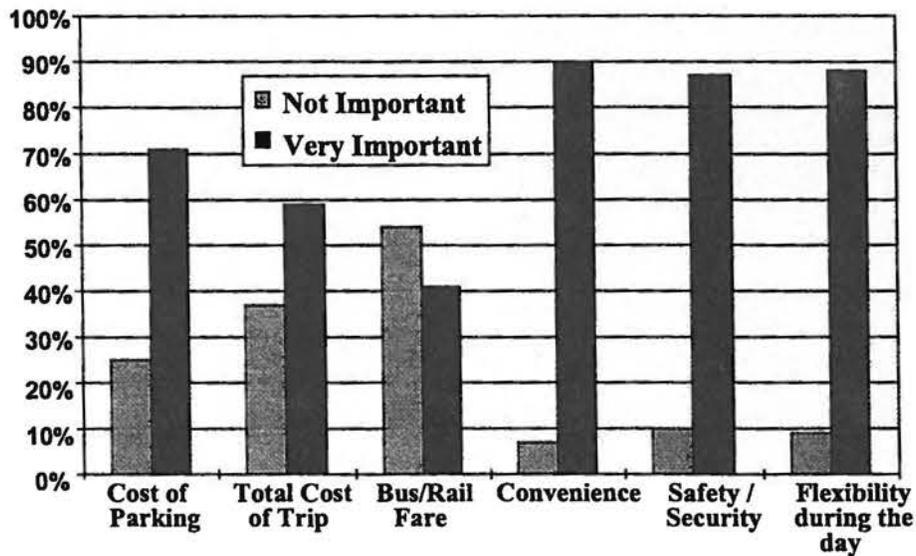
If You **Did Not** Use Metro Bus or Metro Rail To Get to Work, Could You Have?



Valid cases: 1710

## Commuting Characteristics

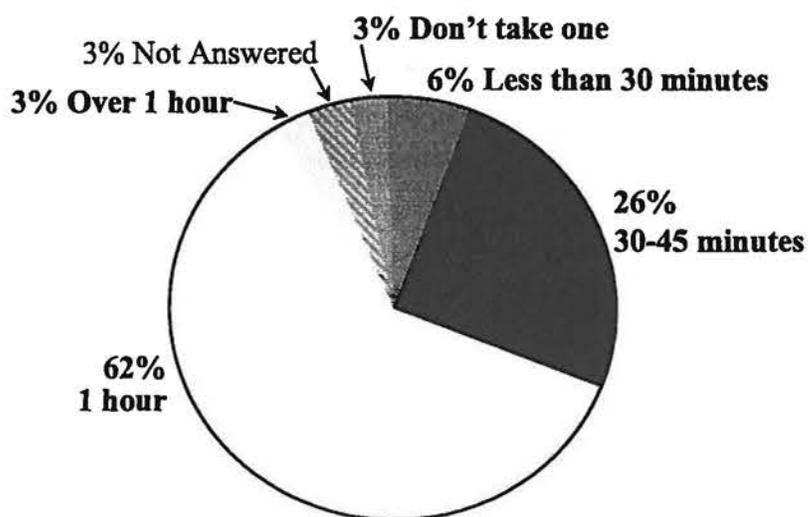
What Influenced Your Transportation Choice?



Valid cases: 2130

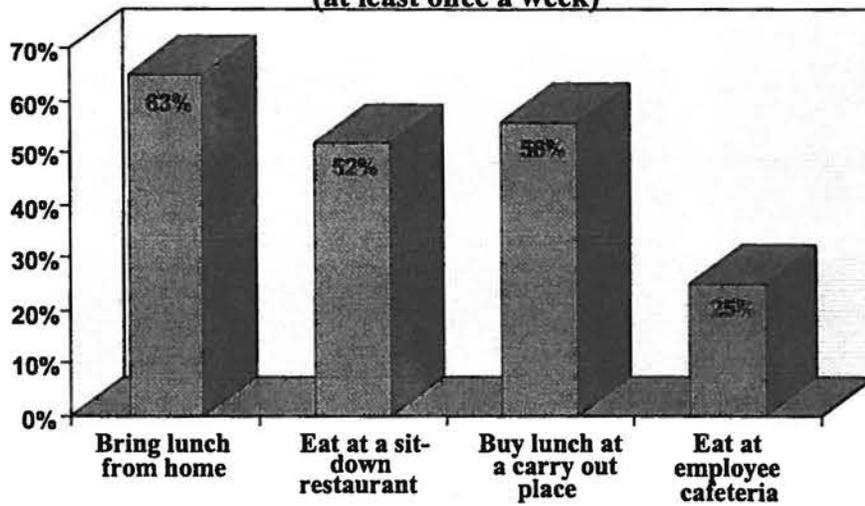
# Lunchtime Activities

## *Lunchtime Activities* How Long Do You Have for Lunch?



Valid cases: 2130

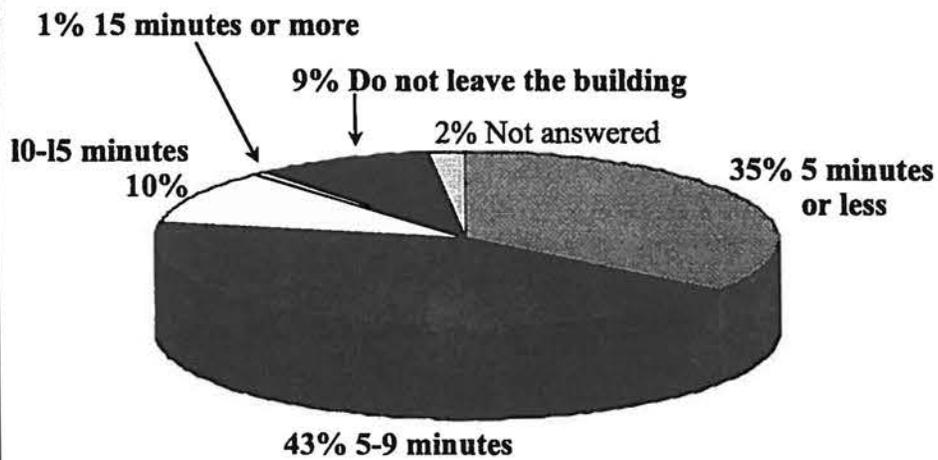
### *Lunchtime Activities* What Do You Do For Lunch? (at least once a week)



Valid cases: 2130

*(Multiple Answers Allowed)*

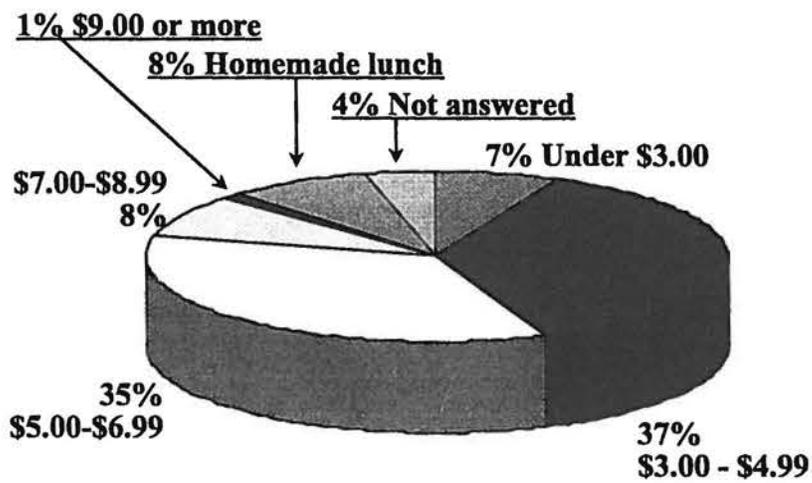
### *Lunchtime Activities* How Long Does It Take You to Reach Your Lunchtime Destination?



Valid cases: 2130

## *Lunchtime Activities*

### How Much Do You Spend for Lunch?

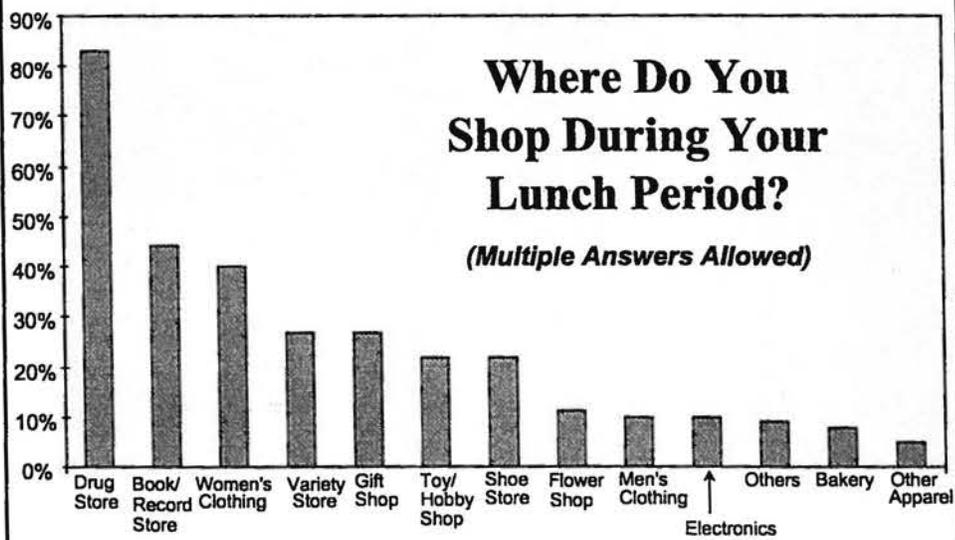


Valid cases: 2130

## *Lunchtime Activities*

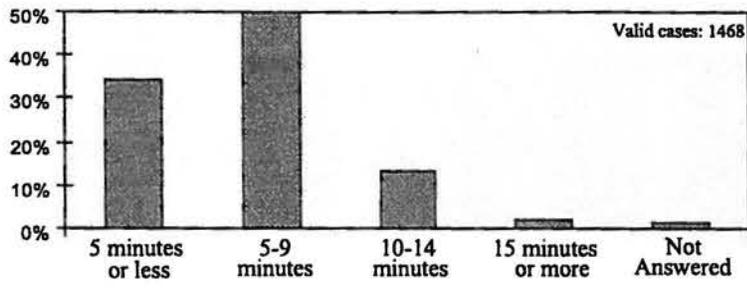
### Where Do You Shop During Your Lunch Period?

*(Multiple Answers Allowed)*

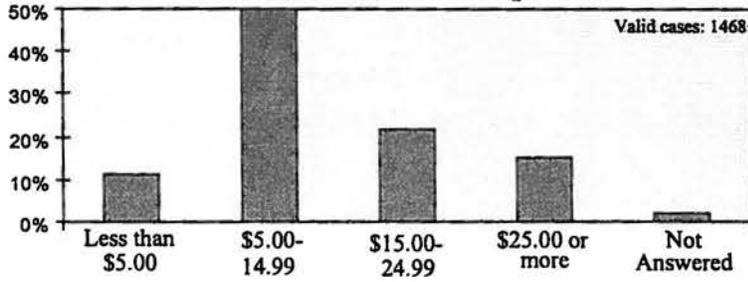


Valid cases: 1468

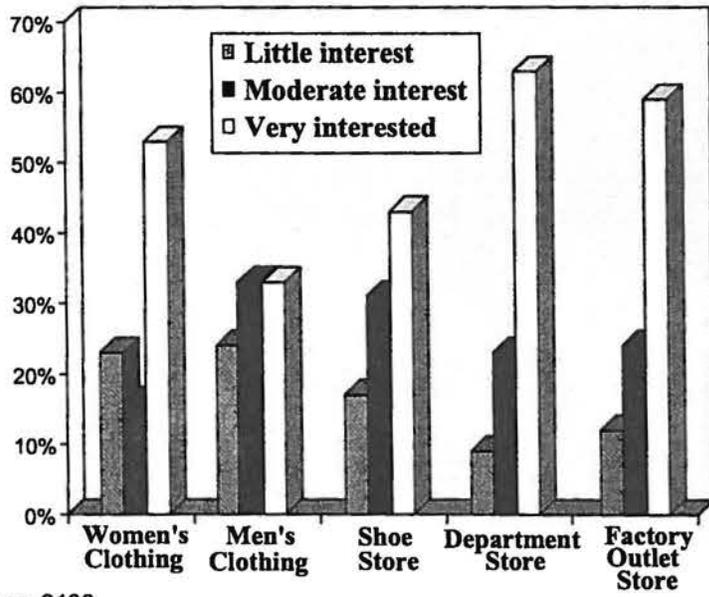
### How Long Does It Take to Travel to Shopping Destinations?

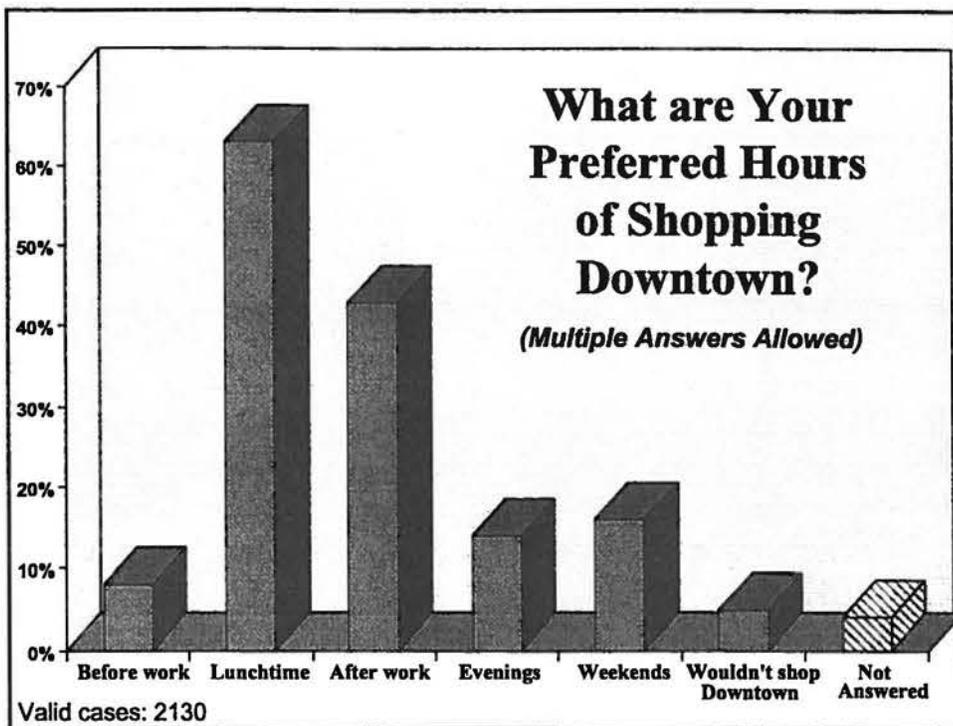


### How Much Do You Spend?



### What Expanded Shopping Opportunities Would You Prefer?

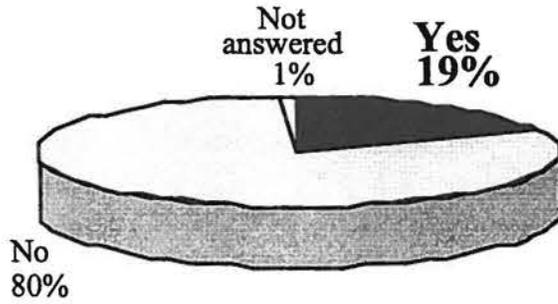




## Living in Downtown Buffalo

## *Living in Downtown Buffalo*

**Would You Be Interested Living In or Near Downtown If New Residential Developments Were Made Available?**

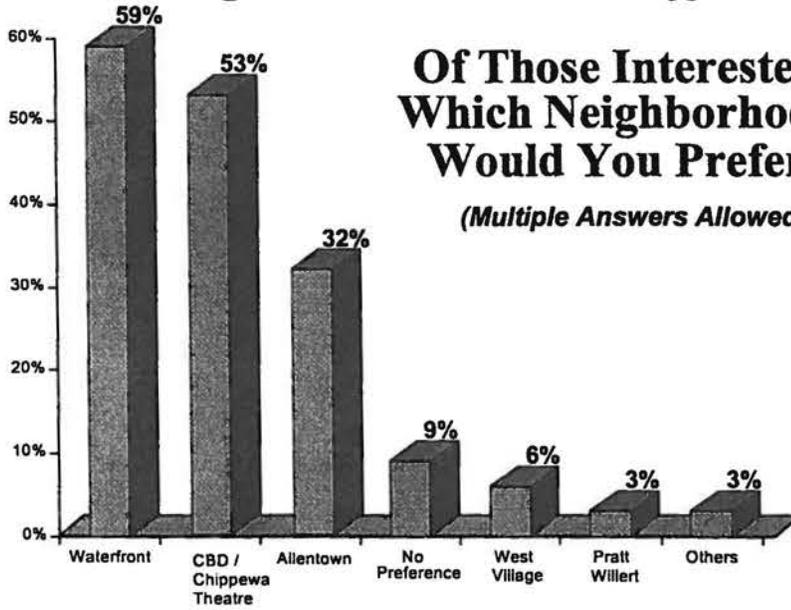


Valid cases: 2130

## *Living in Downtown Buffalo*

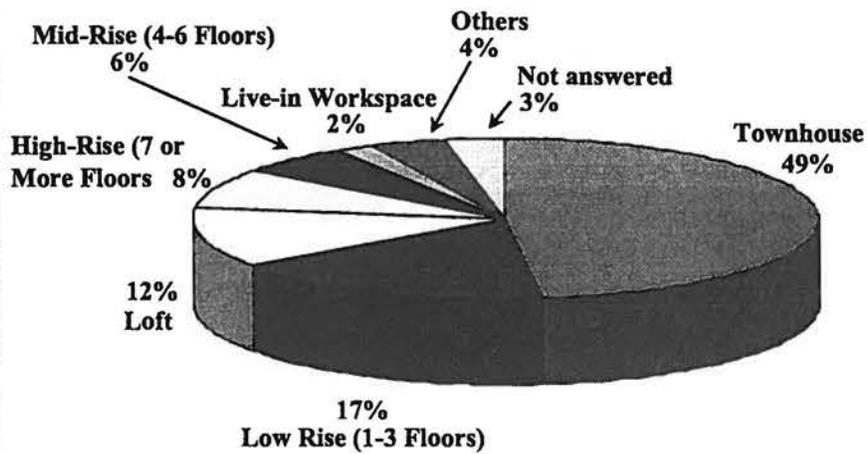
**Of Those Interested, Which Neighborhoods Would You Prefer?**

*(Multiple Answers Allowed)*



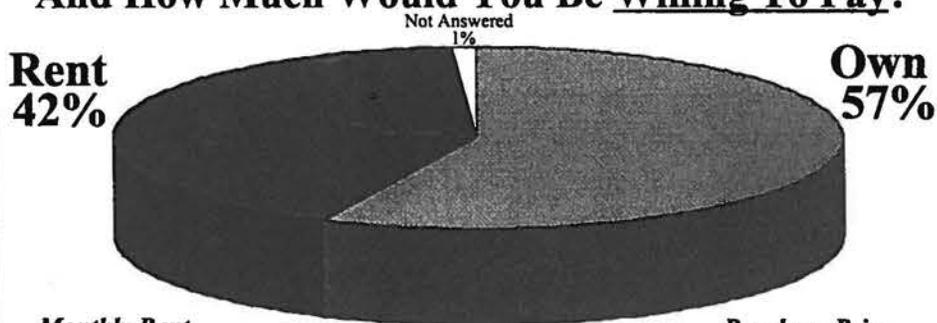
Valid cases: 414

***Living in Downtown Buffalo***  
**Of Those Interested,**  
**What Type of Dwelling Would You Prefer?**



Valid cases: 414

***Living in Downtown Buffalo***  
**Would You Prefer to Own or Rent**  
**And How Much Would You Be Willing To Pay?**



Valid cases: 414

**Monthly Rent**

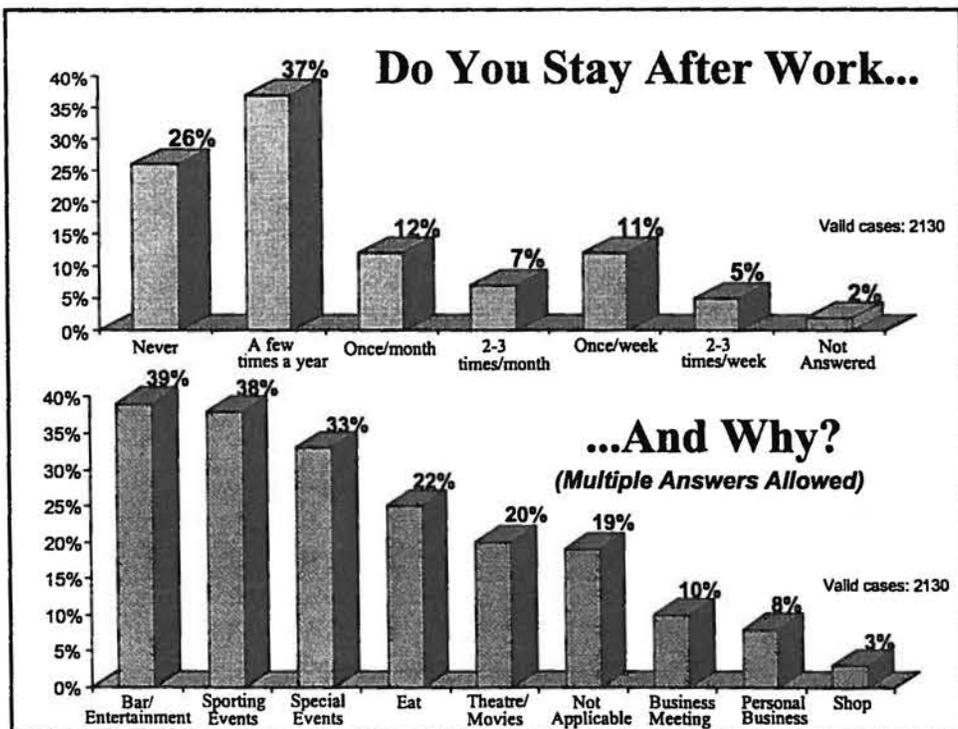
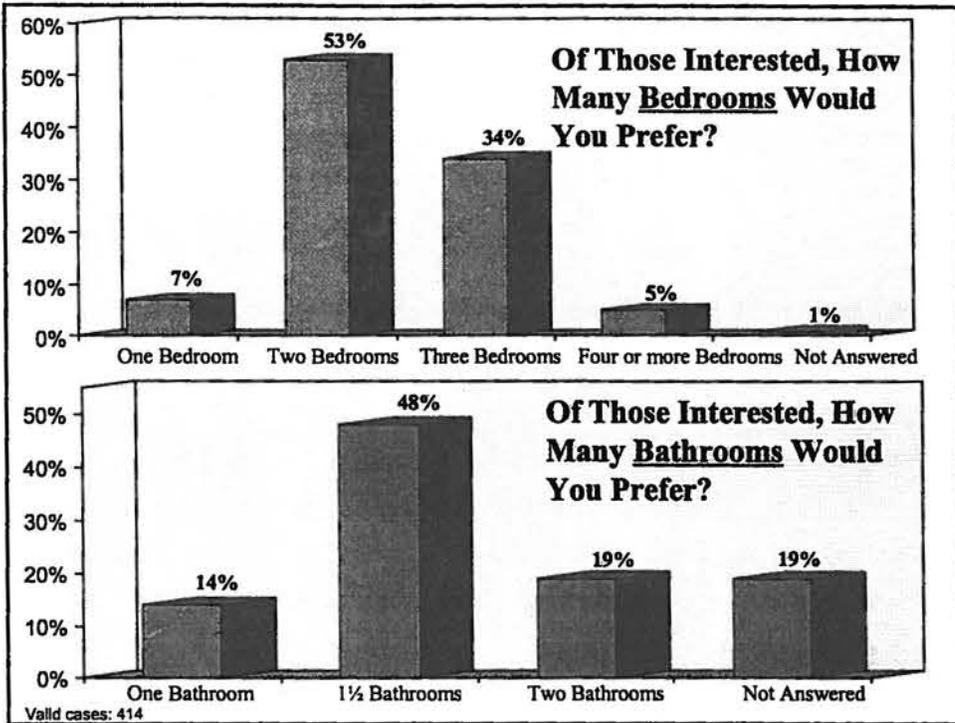
13%	Under \$349
49%	\$350-499
26%	\$500-649
7%	\$650-999
2%	\$1,000-1,499
0%	\$1,500 or more

Valid cases: 174

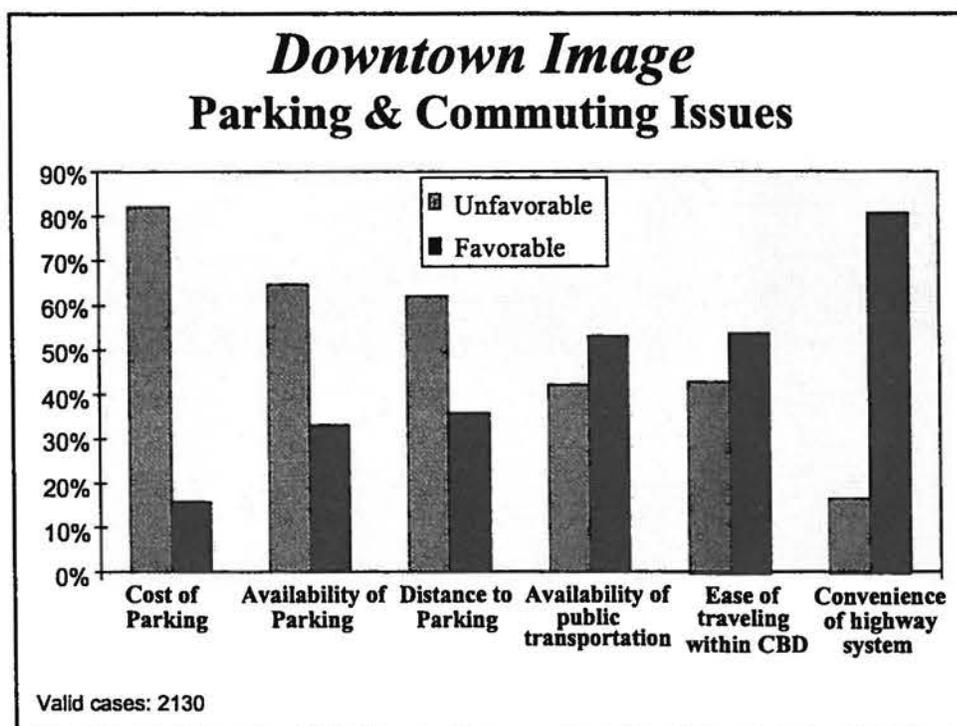
**Purchase Price**

6%	Under \$49,999
29%	\$50,000-74,999
34%	\$75,000-99,999
20%	\$100,000-149,999
5%	\$150,000-199,999
3%	\$200,000-299,999
0%	\$300,000 or more

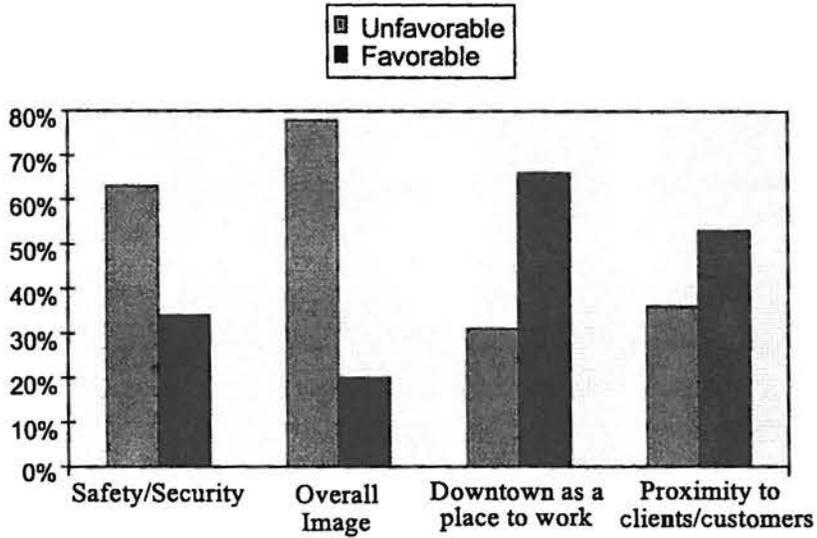
Valid cases: 240



# Downtown Buffalo Image

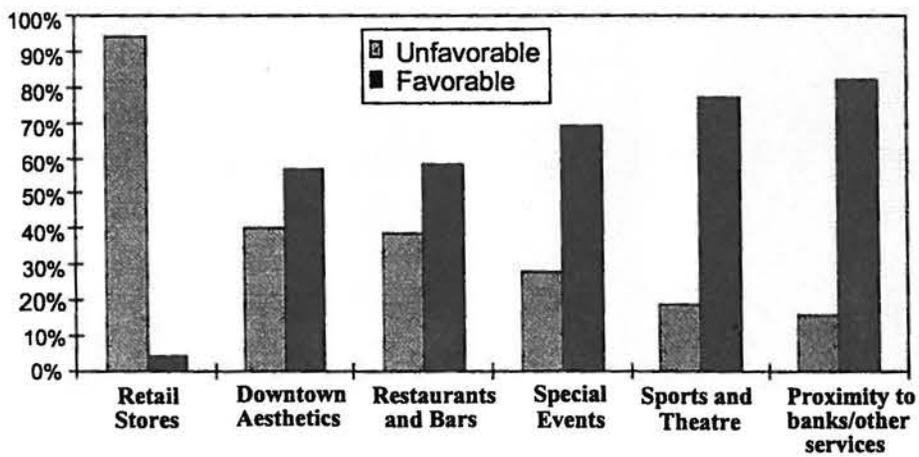


## *Downtown Image* Downtown as a Place to Work



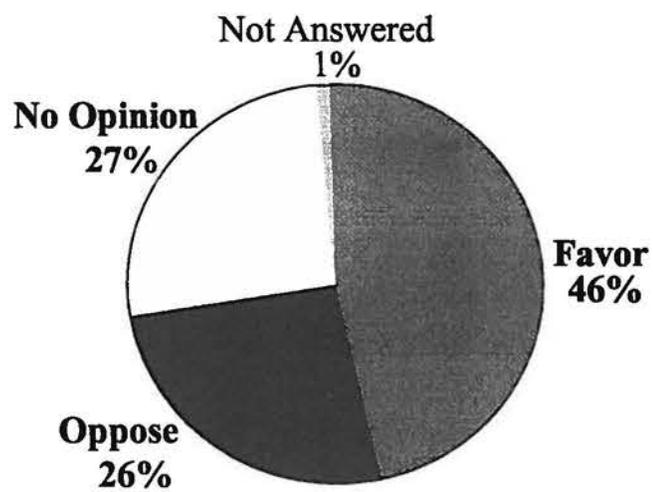
Valid cases: 2130

## *Downtown Image* Downtown as a Place For Shopping and Recreation



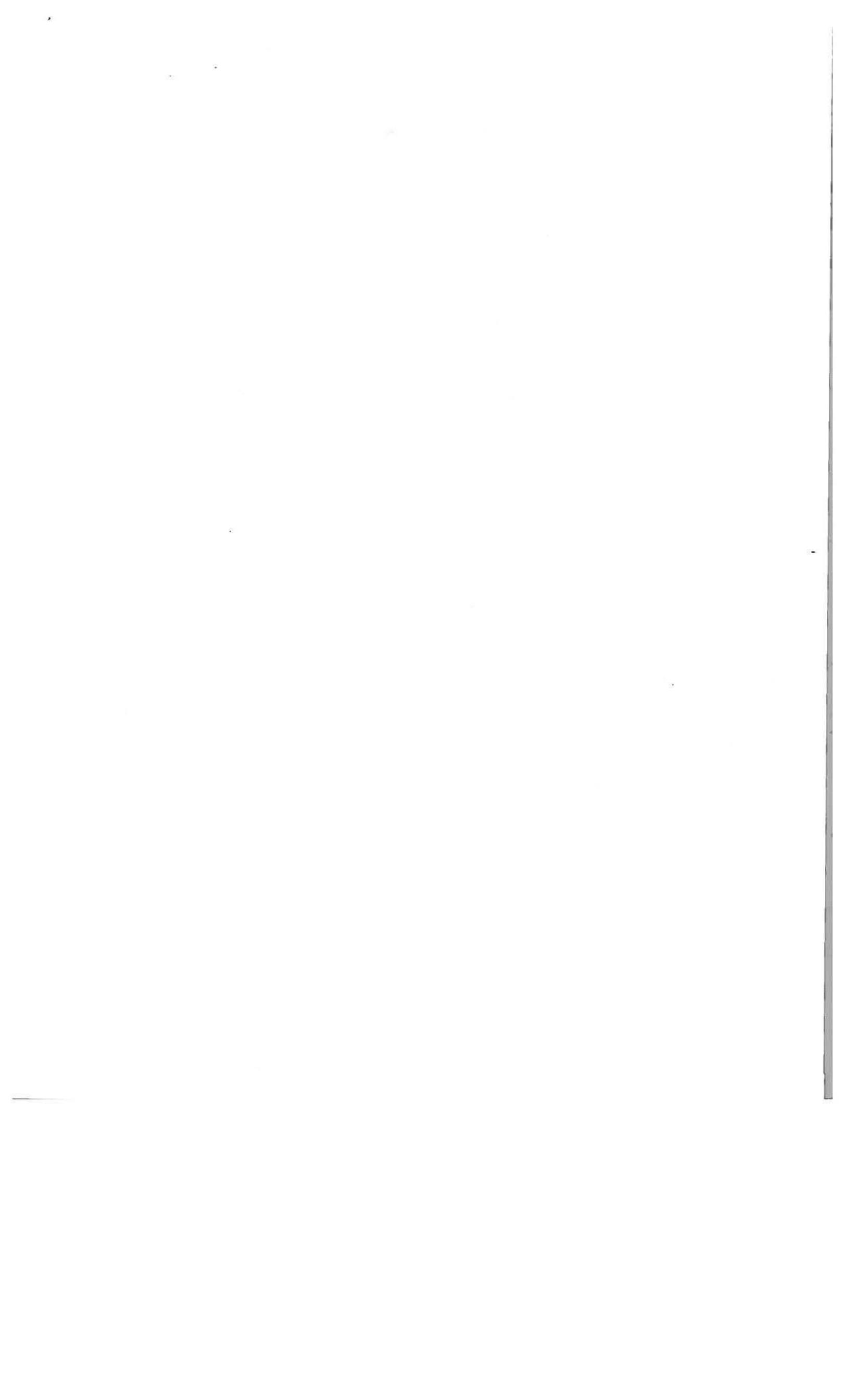
Valid cases: 2130

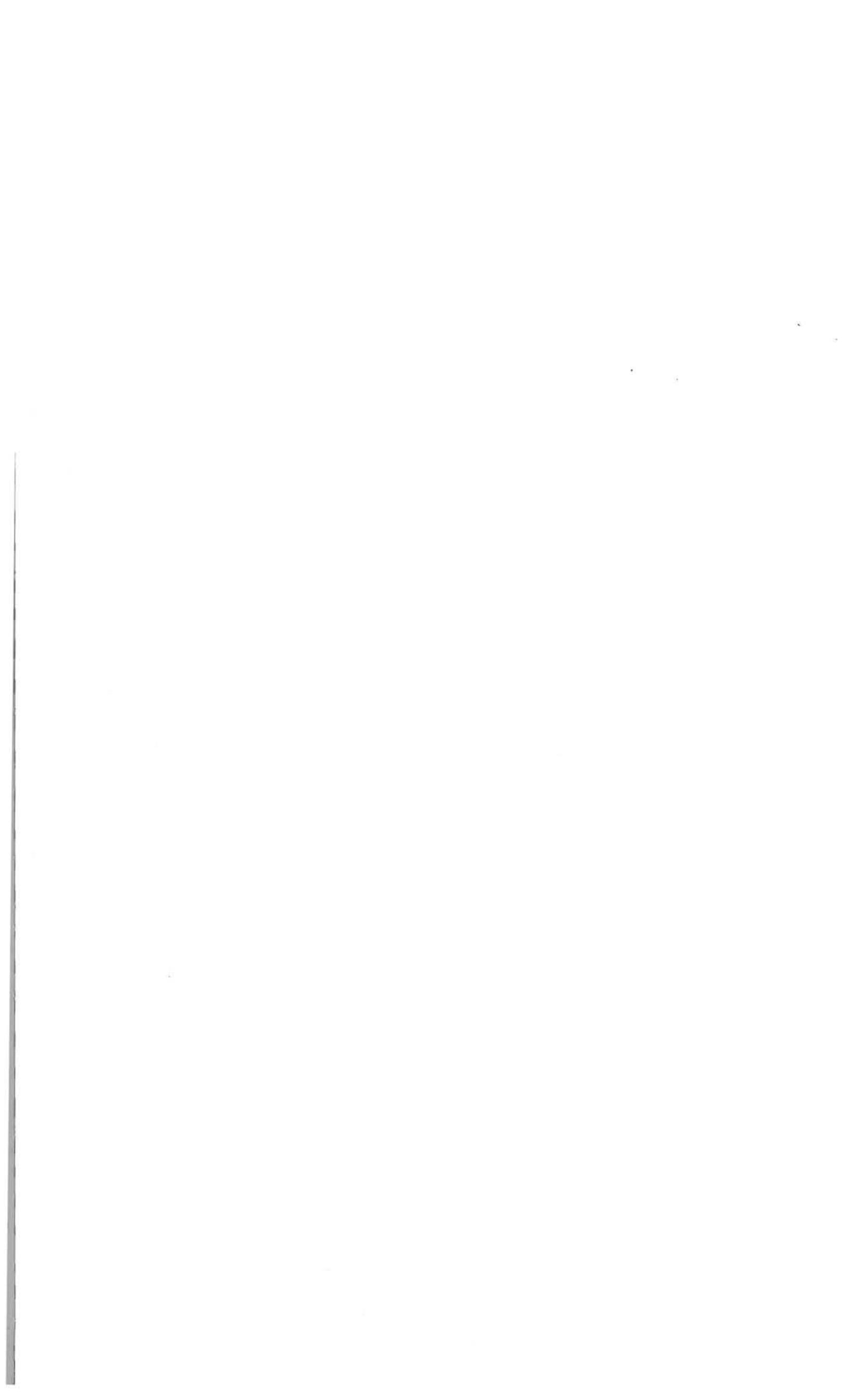
**How Do You Feel About Redesigning Main Street  
to Allow Vehicle Access Alongside Metro Rail?**

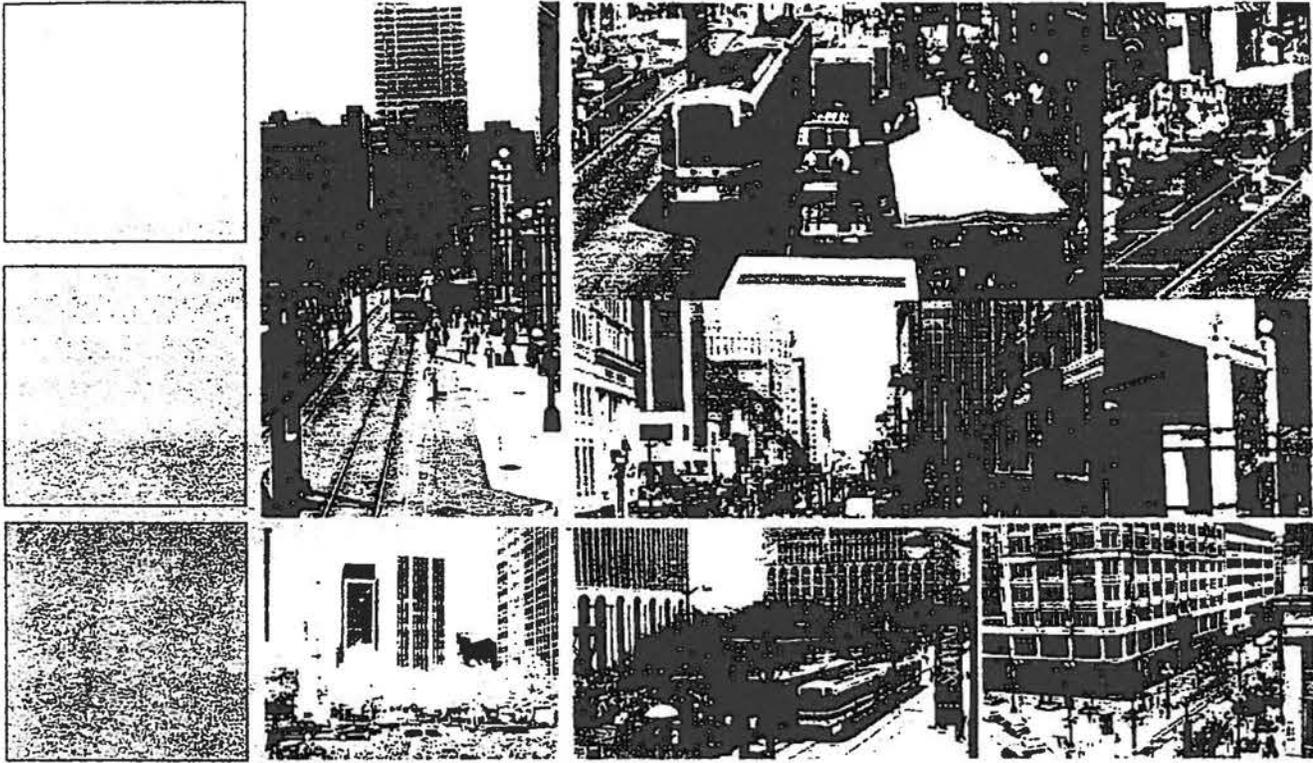


Valid cases: 2130

**Q & A**







1 9 9 8

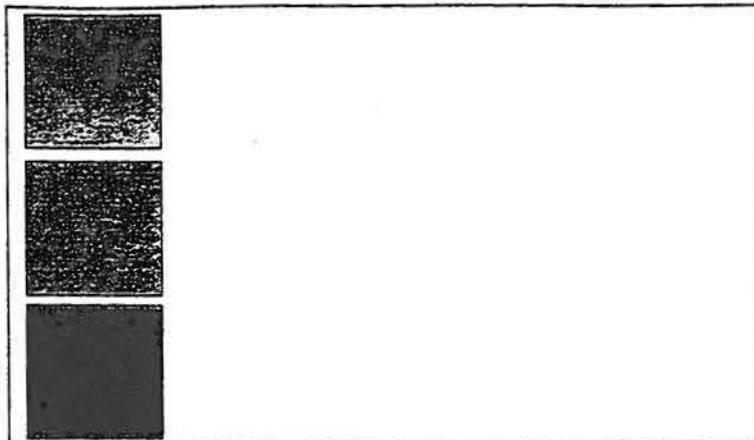
DOWNTOWN  
EMPLOYEE  
SURVEY

*INTERIM RESULTS*



GREATER *BUFFALO-NIAGARA*  
REGIONAL TRANSPORTATION COUNCIL





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1998 DOWNTOWN EMPLOYEE SURVEY

**DOWNTOWN**

1998 DOWNTOWN EMPLOYEE SURVEY

**EMPLOYEE**

1998 DOWNTOWN EMPLOYEE SURVEY

**SURVEY**

December 1998



*Conducted By*

**GREATER BUFFALO-NIAGARA**

**REGIONAL TRANSPORTATION COUNCIL**

*and*

**BUFFALO PLACE INC.**

*in cooperation with the City of Buffalo*

This report was prepared in part with the financial assistance of the U.S. Department of Transportation. However, the contents represent only the view of the authors and do not necessarily reflect the review or approval of the U.S. Department of Transportation.



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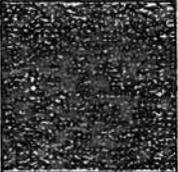
SURVEY

December 1998

## SURVEY PROJECT STAFF

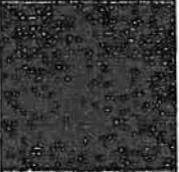
### GREATER BUFFALO-NIAGARA REGIONAL TRANSPORTATION COUNCIL

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	Charles N. Frederiksen	Executive Director
	Timothy F. Trabold	Project Manager, Principal Analyst
	Barbara M. Courtney	Senior Transportation Analyst
	Amy M. Weymouth	Assistant Planner
	Kathryn M. Stilwell	Assistant Planner
	Holly A. Maietta	Assistant Planner
	Elena Vertino	Staff Assistant
	Piya Bahadur	Temporary Survey Technician
	Judy Kamens	Temporary Survey Technician
	Kenneth Field	Senior Graphics Designer
	Richard Guarino	Information Systems Coordinator

### Buffalo Place Inc.

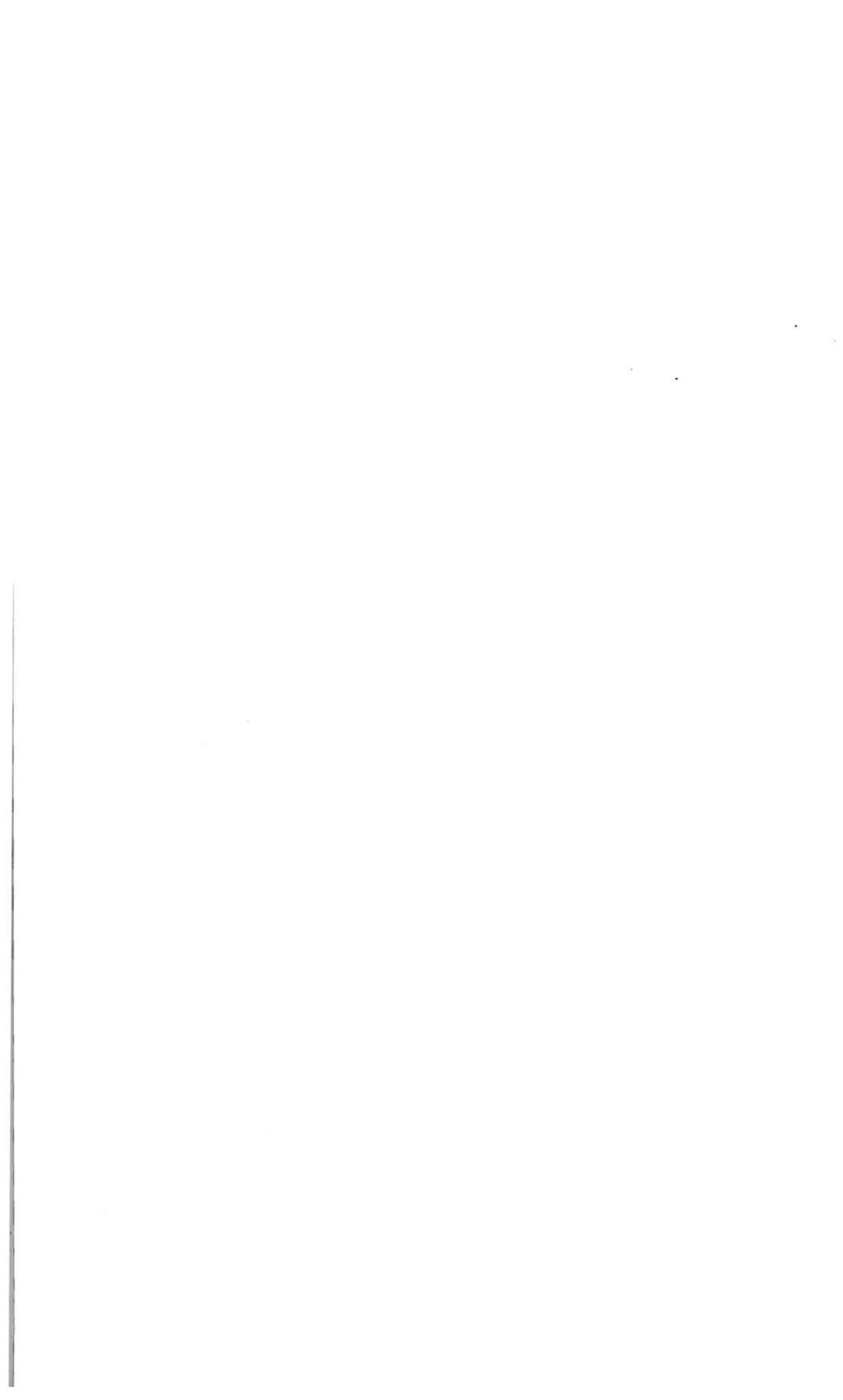
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	Michael T. Schmand	Executive Director
	Debra L. Chernoff	Manager of Planning
	JoAnne E. Loughry	Planner
	Jeanna Scarozza	Intern
	Nicolia Cox	Intern
	Rebecca Costanzo	Intern
	Marilyn Sozanski	Intern

### Focused Marketing Associates

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	Lee M. Grunert	President
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**1998 DOWNTOWN EMPLOYEE SURVEY**

**1. How long is your lunch period?**

Less than 30 minutes 6%	30-45 minutes 26%	1 hour 62%	Over 1 hour 3%	Don't take one 3%
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Valid: 2130

Not Answered: 3%

**2. What do you usually do for lunch? How many days (if any) of a typical 5-day week do you do each of the following?**

	DAYS per WEEK						Not Answered
	Never	Once per Week	Twice per Week	Three per Week	Four per Week	Everyday	
Bring lunch from home	36%	12%	12%	16%	12%	11%	1%
Eat at a sit-down restaurant	47%	30%	10%	5%	2%	5%	1%
Buy lunch at carryout place	43%	25%	17%	8%	3%	3%	1%
Eat at employee cafeteria	74%	10%	6%	4%	2%	3%	1%
Skip lunch	82%	8%	4%	2%	1%	2%	1%
Other (specify)	<1%	1%	<1%	<1%	<1%	<1%	97%

Valid: 2130

**3. On a typical workday, if you leave the office building for lunch, how long does it take you to reach your destination?**

Less than 5 minutes 35%	5-9 minutes 43%	10-14 minutes 10%	More than 15 minutes 1%	Usually don't leave building 9%
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Valid: 2130

Not Answered: 2%

**4. How much do you usually spend for lunch if you don't bring it from home?**

Under \$3.00 7%	\$3.00 - 4.99 37%	\$5.00 - 6.99 35%	\$7.00 - 8.99 8%	\$9.00 or more 1%	Homemade Lunch 8%
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Valid: 2130

Not Answered: 4%

**How often do you typically:**

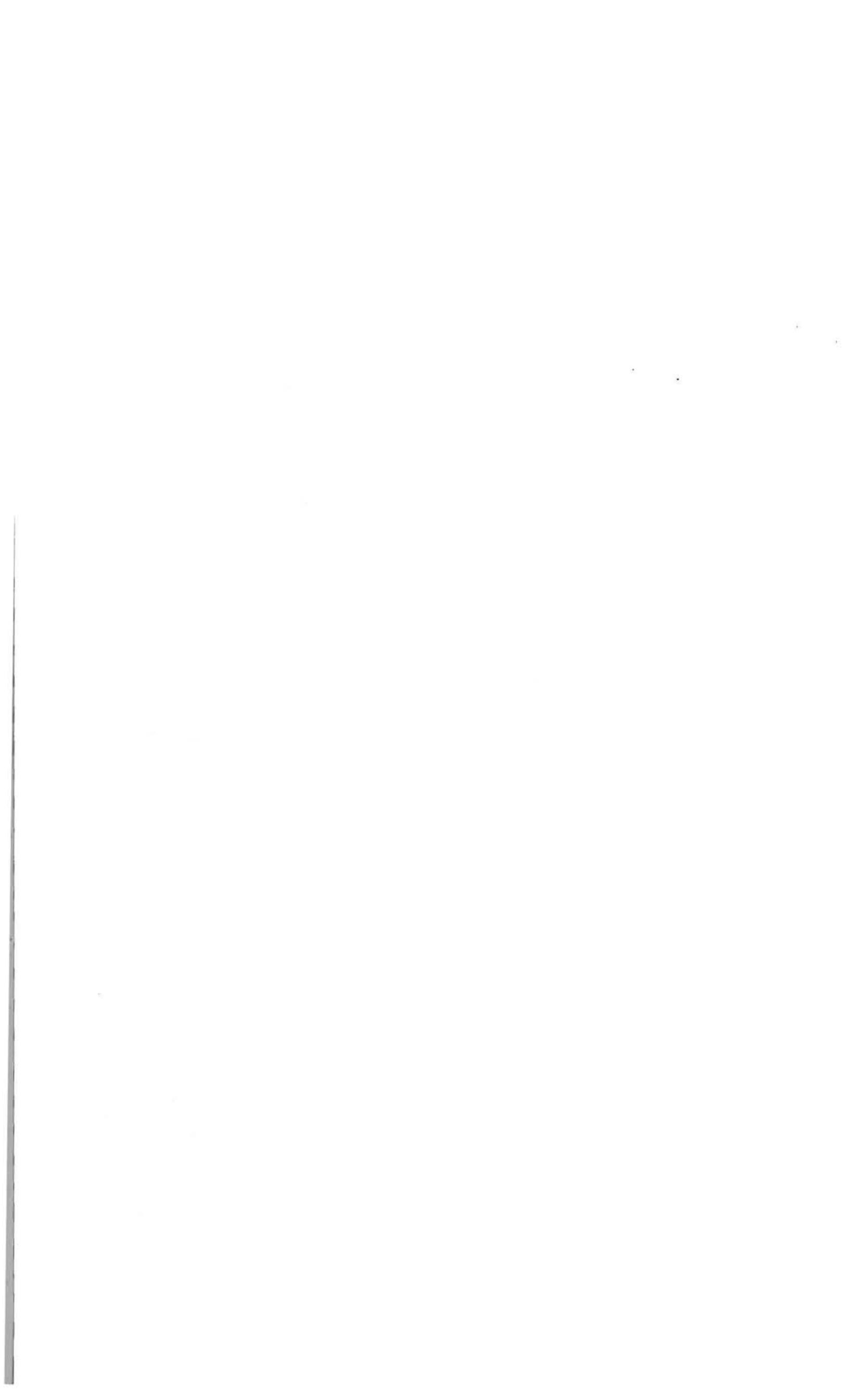
	Never	A few times/Year	Once/Month	2-3 Times/Month	Once/Week	2-3 Times/Week	Not Answered
5. Take Metro Rail during your workday?	51%	17%	5%	5%	8%	12%	2%
6. Leave the downtown area for lunch?	51%	21%	8%	5%	9%	4%	2%
7. Stay downtown to do something after work?	26%	37%	12%	7%	11%	5%	2%
8. Come back downtown, other than for work, on evenings, weekends, or your days off?	14%	47%	12%	12%	9%	5%	1%
9. Go non-food shopping during your lunch period?	26%	18%	14%	11%	16%	10%	5%

Valid: 2130

**10. If you go non-food shopping, where do you typically shop during your lunch period?**

83% Drug store	10% Men's clothing	40% Women's clothing	5% Other apparel	22% Shoe store
8% Bakery/food store	44% Book/record store	27% Variety store	27% Gift shop	11% Flower shop
22% Toy/hobby shop	10% Electronics	9% Other(s)		

Valid: 1468 (Multiple Answers Allowed)



**11. How long does it typically take you to travel to these lunchtime shopping destinations?**

Less than 5 minutes 34%	5-9 minutes 50%	10-14 minutes 13%	More than 15 minutes 2%
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Valid: 1468

Not Answered: 1%

**12. On average, how much do you spend on these lunchtime shopping trips?**

Under \$5.00 11%	\$5.00 - 14.99 50%	\$15.00 - 24.99 22%	\$25.00 or more 15%
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Valid: 1468

Not Answered: 2%

**13. If there were expanded downtown shopping opportunities, on a scale of 1-6 indicate your interest in shopping at the following store types:**

	No Interest			Very Interested			
Women's Clothing	18%	5%	8%	8%	13%	40%	8%*
Men's Clothing	15%	9%	16%	17%	13%	20%	10%*
Shoe Store	10%	7%	15%	16%	15%	28%	8%*
Indoor Farmer's Market	12%	8%	16%	18%	16%	22%	8%*
Children's Apparel	36%	11%	12%	9%	8%	13%	12%*
Department Store	6%	3%	10%	13%	18%	45%	5%*
Home Accessory Store	12%	8%	14%	17%	16%	26%	7%*

Valid: 2130

Not Answered

	No Interest				Very Interested			
Factory Outlet Store	7%	5%	11%	13%	17%	42%	5%*	
Book Store	10%	10%	18%	19%	15%	22%	8%*	
Hardware Store	26%	16%	18%	13%	7%	9%	10%*	
Grocery/Green Grocer	20%	14%	16%	14%	11%	15%	10%*	
Gift Shop	9%	11%	19%	22%	15%	17%	8%*	
Appliances/Electrical	31%	20%	18%	10%	5%	5%	11%*	
Furniture Store	37%	18%	15%	9%	4%	6%	10%*	

Not Answered

**14. If there were expanded shopping opportunities downtown, what would be your preference for hours of shopping?**

Before work 8%	Lunchtime 63%	After work 43%	Evenings 14%	Weekends 16%	Wouldn't shop downtown 5%
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Valid: 2130 (Multiple Answers Allowed)

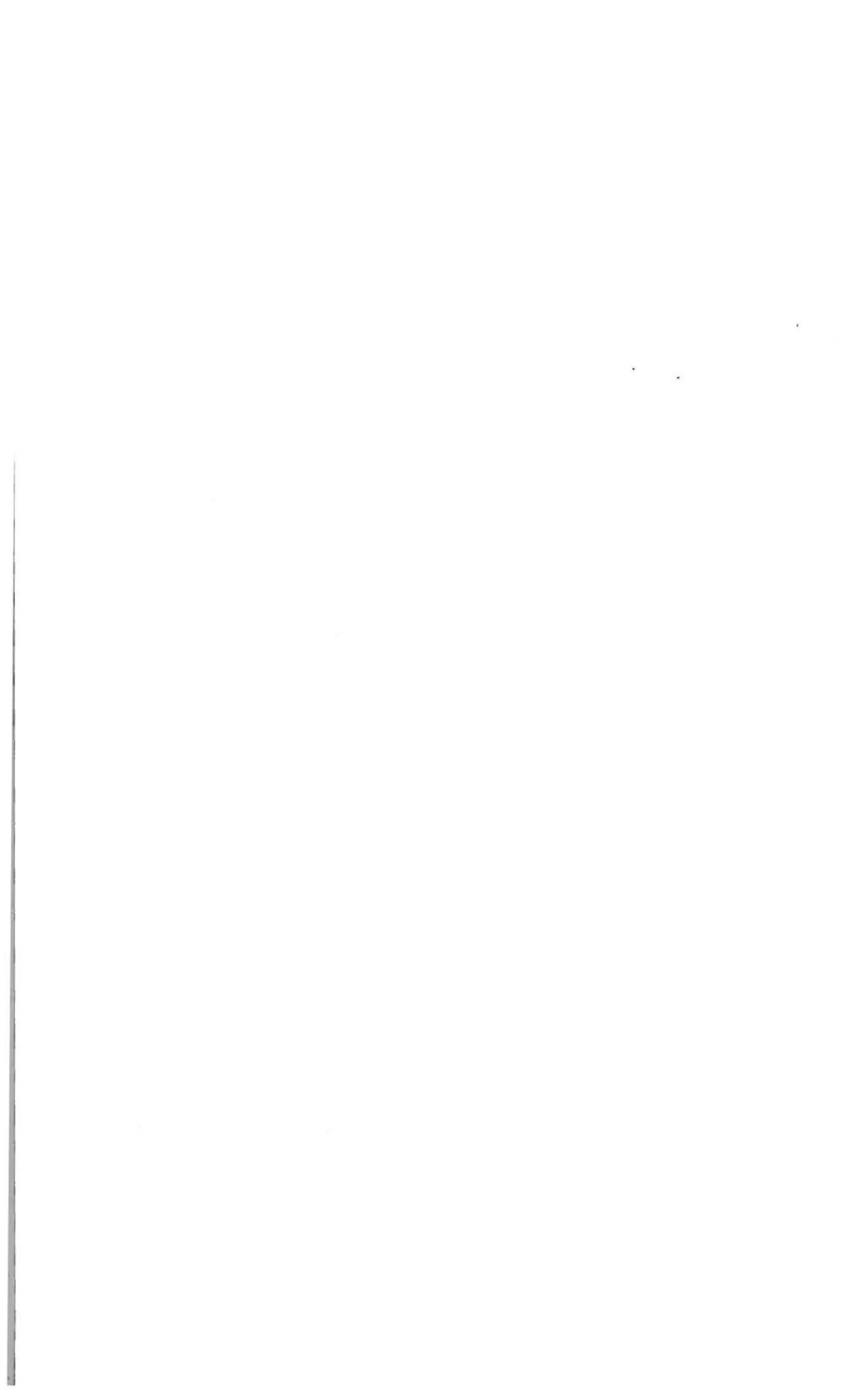
Not Answered: 4%

**15. Which TWO shopping areas listed below have you shopped at most during the past few months for items other than food, beverage and drug products?**

51%	Galleria Mall & Area	1%	Lockport Mall & Area	<1%	Rainbow Center & Area
29%	Boulevard Mall & Area	4%	Main Place Mall	2%	Sheridan Plaza & Area
3%	Downtown Buffalo Stores	24%	McKinley Mall & Area	1%	Summit Park Mall & Area
10%	Eastern Hills Mall & Area	7%	Niagara Factory Outlet Mall	1%	University Plaza & Area
4%	Northtown Plaza & Area	5%	Southgate Plaza & Area	3%	Consumer Square, N. Buffalo
41%	Discount Department Stores (e.g., Wal-Mart, Target, etc.)	7%	Neighborhood Stores	2%	Others

Valid: 2130 (Multiple Answers Allowed)

Not Answered: 4%



**For what purpose(s) do you frequent downtown other than for your normal workday?**

	Shop	Eat	Bar/ Entertainment	Personal Business	Business Meeting	Theatre/ Movie	Sporting Events	Special Events	Not Applicable
<b>16. Stay downtown after work</b>	3%	22%	39%	8%	10%	20%	38%	33%	19%
<b>17. Evenings, weekends, days off</b>	3%	25%	31%	6%	3%	36%	51%	45%	14%

Valid: 2130 (Multiple Answers Allowed)

Other Reasons: 1%

**18. Do you presently own or rent your residence?**

Own: 73%    Rent: 21%    Not Applicable: 5%  
 Valid: 2130    Not Answered: 1%

**19. a. If new residential developments were to occur downtown, would you be interested in living in or near downtown?**

Yes: 19%    No: 80%  
 Valid: 2130    Not Answered: 1%

**If no, briefly explain why: (Top Reasons Given)**

- Prefer to Live Elsewhere (42%)
- Not Answered (22%)
- Safety Concerns (15%)
- Family Reasons (12%)
- Quality of Life (10%)
- Lack of Amenities (5%)

Valid: 1698 (Multiple Answers Allowed)

**b. What type of residential dwelling would you prefer to own?**

Townhouse: 49%    Low rise [1-3 floors]: 17%    Mid-rise [4-6 floors]: 6%    High-rise [7 or more floors]: 8%  
 Loft: 12%    Live-in workspace: <1%    Other(s): 4%

Valid: 414

Not Answered: 3%

**c. Which neighborhood(s) would you be interested in?**

West Village: 6%    Allentown: 32%    Waterfront: 59%    Downtown Core: 30%    Chippewa/Theatre: 23%  
 Pratt Willert: 3%    No Preference: 9%    Other(s): 3%

Valid: 414 (Multiple Answers Allowed)

**d. Would you prefer to Own or Rent ?**

Own: 57%    Rent: 42%  
 Valid: 414    Not Answered: 1%

**e. If preferring to Own, what purchase price level or range would you be willing to pay?**

Under \$49,999: 6%    \$50,000-74,999: 29%    \$75,000-99,999: 34%    \$100,000-149,999: 20%  
 \$150,000-199,999: 5%    \$200,000-299,999: 3%    \$300,000 or more: 0%

Valid: 240

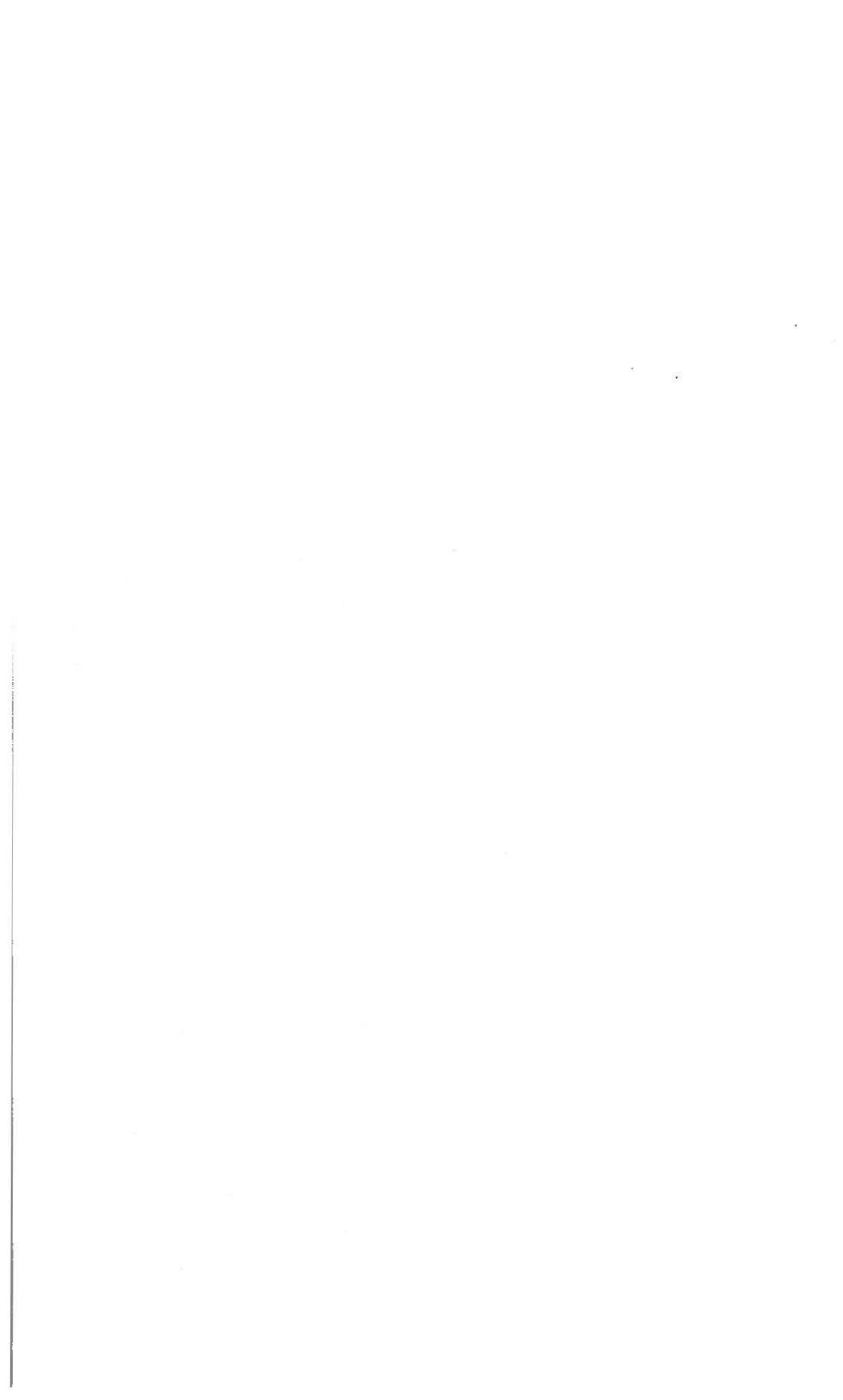
Not Answered: 3%

**f. If preferring to Rent, what monthly price level or range would you be willing to pay?**

Under \$349: 13%    \$350-499: 49%    \$500-649: 26%    \$650-999: 7%    \$1,000-1,499: 2%    \$1,500 or more: 0%

Valid: 178

Not Answered: 3%



**20. On a scale of 1 - 6, rate the following amenities you would like to have and be willing to pay a premium for:**

	No Interest			Very Interested				
Den / Library	20%	13%	21%	12%	11%	11%	12%	*
Central Air-Conditioning	6%	5%	14%	17%	22%	31%	5%	*
Jacuzzi / Spa	22%	12%	17%	19%	10%	9%	11%	*
Fireplace	10%	7%	16%	19%	18%	23%	7%	*
Skylights	11%	7%	15%	20%	21%	19%	7%	*
Well Equipped Kitchen	1%	2%	6%	17%	29%	41%	4%	*
Balcony / Porch	2%	1%	5%	15%	28%	45%	4%	*
Storage	2%	3%	9%	23%	23%	35%	5%	*
Hardwood Floors	8%	8%	18%	18%	18%	23%	7%	*

Valid: 414 \*Not Answered

	No Interest			Very Interested				
Security	1%	2%	6%	14%	17%	56%	4%	*
On-Site Restaurant	27%	20%	20%	13%	4%	6%	10%	*
Separate Dining Room	13%	10%	23%	18%	13%	14%	9%	*
Courtyard / Greenspace	8%	7%	17%	21%	17%	23%	7%	*
Maintenance Service	5%	7%	14%	20%	22%	25%	7%	*
Maid / Desk Service	34%	18%	16%	9%	6%	6%	11%	*
Health Club	17%	13%	17%	17%	13%	14%	9%	*
On Site Parking	3%	2%	2%	7%	20%	61%	5%	*
Other (specify):	24 other amenities listed = 6%							*

\*Not Answered

**21. What size dwelling would you prefer?**

**Number of bedrooms:**

One: 7% Two: 53% Three: 34% Four or more: 5%

Valid: 414 \*Not Answered: 1%

**Number of bathrooms:**

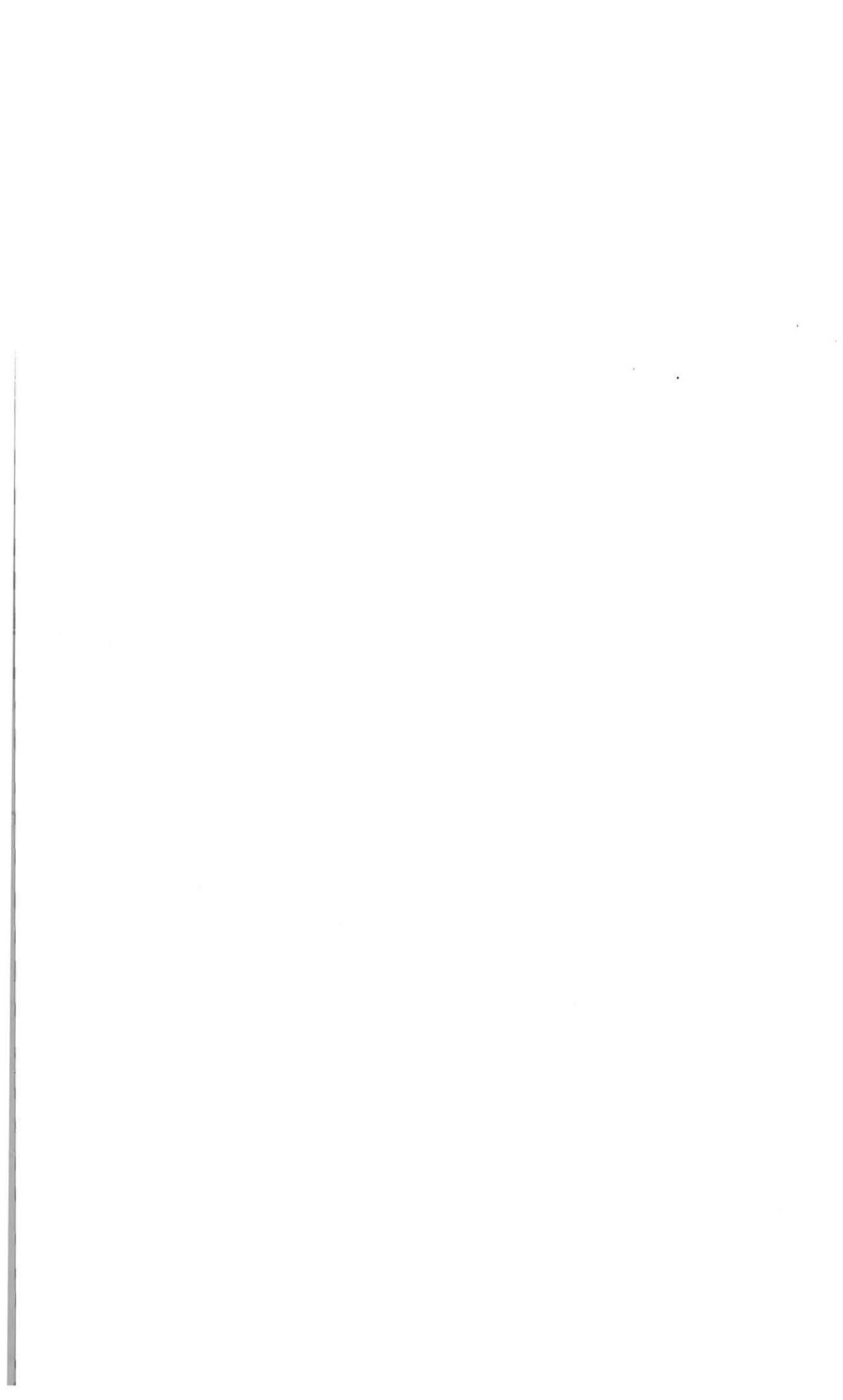
One: 14% One and one-half: 48% Two or more: 19%

Valid: 414 \*Not Answered: 19%

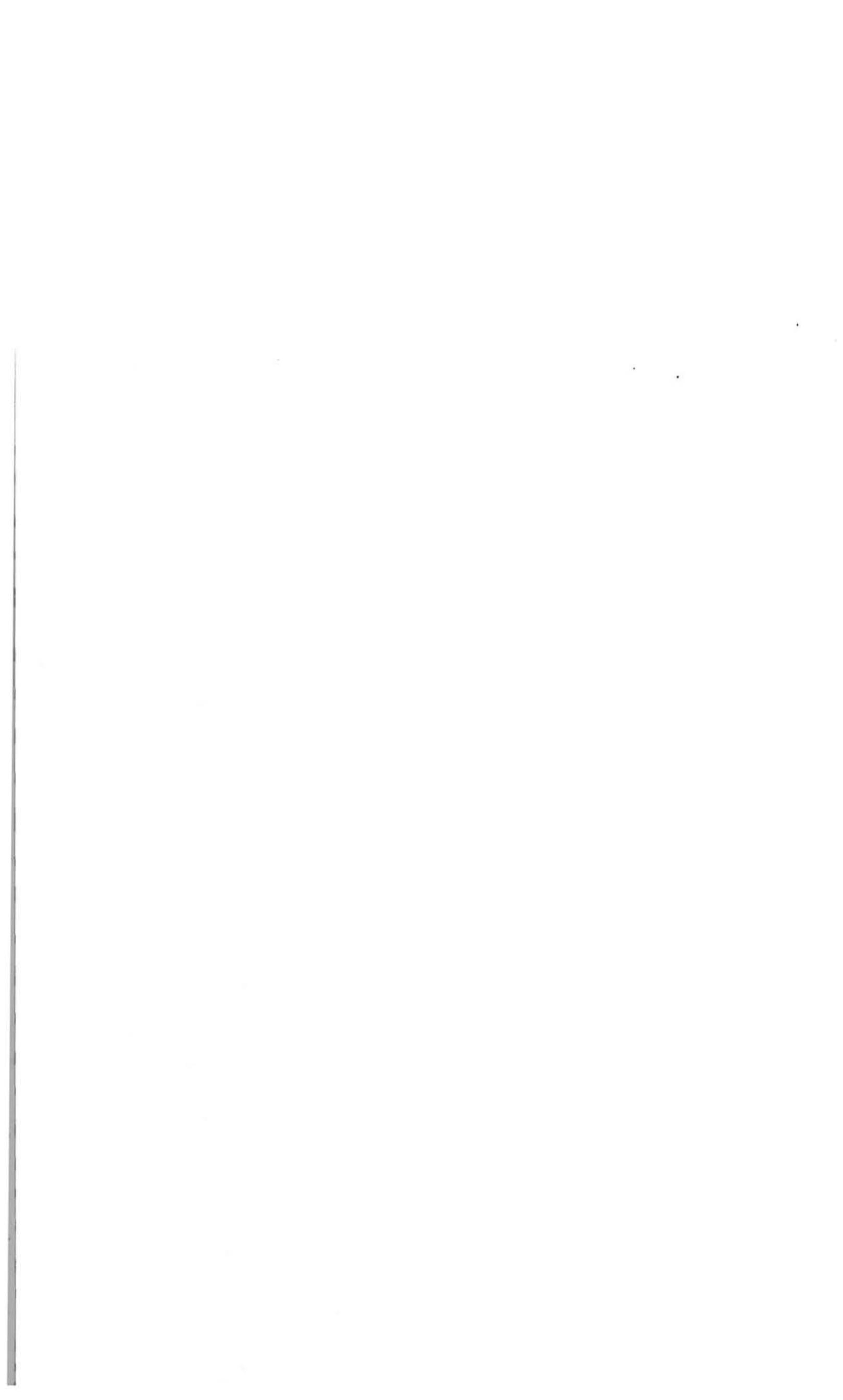
**22. On a scale of 1 - 6, where 6=excellent, how would you rate each of the following with regard to working downtown?**

	Poor				Excellent		Not Answered
Downtown as a place to work	4%	7%	20%	31%	20%	15%	3%
Image of downtown	24%	28%	26%	15%	4%	<1%	2%
Restaurants and bars	3%	9%	27%	33%	20%	5%	3%
Retail stores	57%	27%	10%	2%	<1%	<1%	2%
Special events	3%	5%	20%	32%	28%	9%	3%
Cost of parking	42%	20%	20%	11%	4%	1%	2%
Availability of parking	25%	17%	23%	18%	11%	4%	2%
Distance to parking	20%	16%	26%	19%	12%	5%	2%
Availability of public transportation to downtown	9%	10%	23%	22%	20%	11%	5%
Convenience of highway system to downtown	2%	3%	12%	26%	35%	19%	3%
Proximity to banks/other services, city & county halls	1%	2%	13%	25%	36%	20%	3%
Proximity to clients/customers	4%	7%	25%	28%	18%	7%	11%
Downtown activities (sports, theatre, etc.)	1%	3%	15%	28%	35%	14%	4%
Safety/security	14%	21%	28%	23%	9%	2%	3%
Ease of traveling within the central business area	6%	11%	26%	28%	20%	6%	3%
Downtown aesthetics (historical buildings, landmarks)	5%	10%	25%	27%	19%	11%	3%

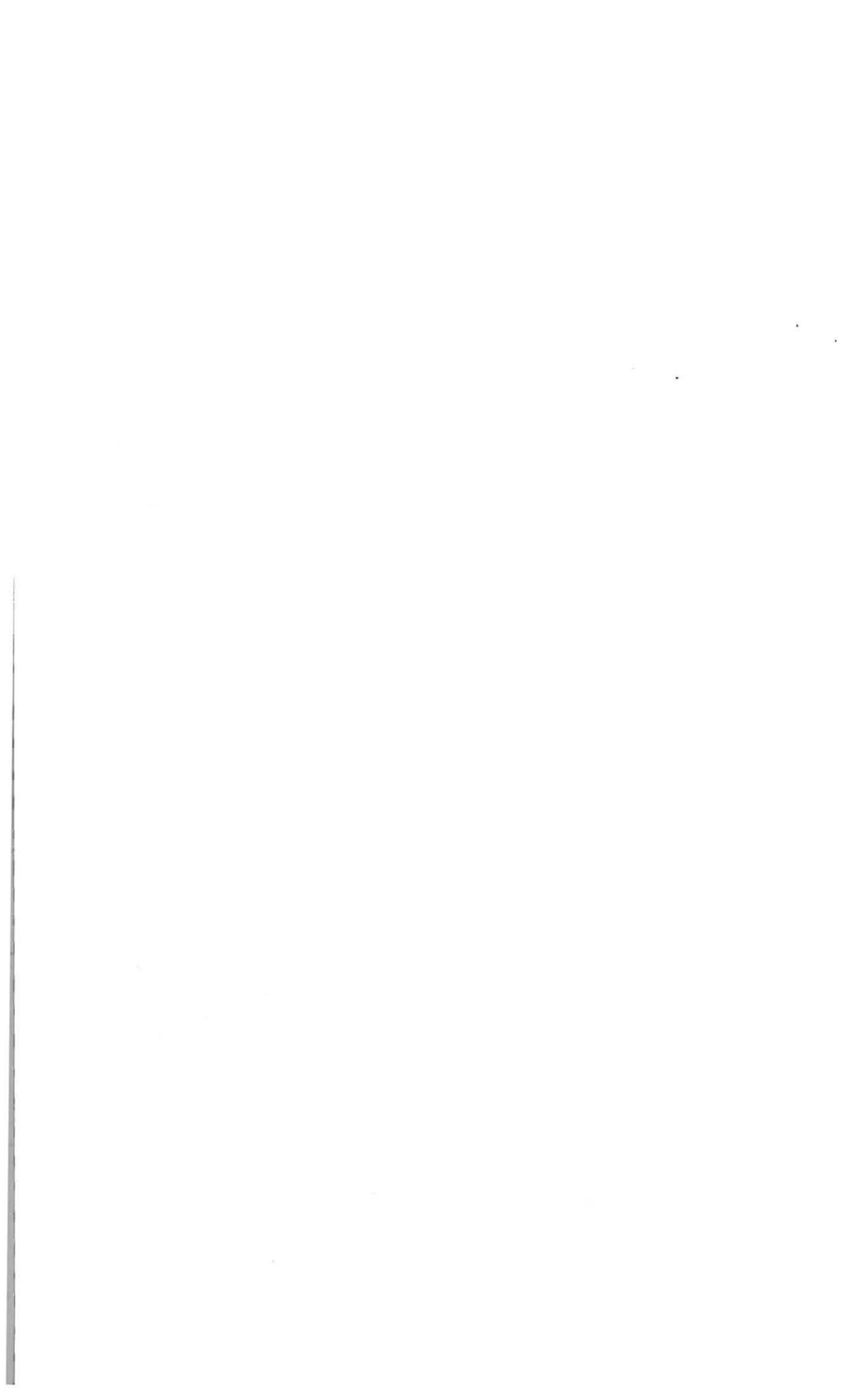
Valid: 2130











**End Work...**

12:00 AM - 12:59 AM 0.4%	3:00 PM - 3:29 PM 1.9%	6:15 PM - 6:29 PM 0.0%
5:00 AM - 5:59 AM 0.1%	3:30 PM - 3:59 PM 5.0%	6:30 PM - 6:44 PM 0.9%
6:00 AM - 6:14 AM 0.0%	4:00 PM - 4:14 PM 13.4%	6:45 PM - 6:59 PM 0.0%
8:00 AM - 8:14 AM 0.0%	4:15 PM - 4:29 PM 0.9%	7:00 PM - 7:29 PM 1.4%
9:00 AM - 9:14 AM 0.0%	4:30 PM - 4:44 PM 16.7%	7:30 PM - 7:59 PM 0.2%
10:00 AM - 10:29 AM 0.0%	4:45 PM - 4:59 PM 1.2%	8:00 PM - 8:29 PM 0.3%
11:00 AM - 11:29 AM 0.1%	5:00 PM - 5:14 PM 40.6%	8:30 PM - 8:59 PM 0.1%
12:00 PM - 12:14 PM 0.2%	5:15 PM - 5:29 PM 0.5%	9:00 PM - 9:59 PM 0.2%
1:00 PM - 1:14 PM 0.2%	5:30 PM - 5:44 PM 5.9%	10:00 PM - 10:59 PM 0.3%
2:00 PM - 2:29 PM 0.6%	5:45 PM - 5:59 PM 0.1%	11:00 PM - 11:59 PM 0.4%
2:30 PM - 2:59 PM 0.3%	6:00 PM - 6:14 PM 6.4%	

Valid: 2130

Not Answered: 1%

**Please describe your typical COMMUTE TO WORK:**

**38. Your home-to-work trip takes:**

Less than 5 minutes: 2%	5-9 minutes: 7%	10-14 minutes: 18%	15-19 minutes: 17%
20-24 minutes: 20%	25-29 minutes: 18%	30 minutes or more: 18%	

Valid: 2130

Not Answered: <1%

**39. Your usual commuting distance (one-way) from home to work is:**

Less than 1 mile: 2%	1 - 2 miles: 4%	3 - 4 miles: 10%	5 - 6 miles: 13%
7 - 10 miles: 22%	11 - 15 miles: 22%	16 - 25 miles: 18%	More than 25 miles: 6%

Valid: 2130

Not Answered: 3%

**40. How do you usually get to work (if you normally use more than one mode, check all that apply)?**

**Single Mode to Work**

Driver or Passenger in a Car Van or Truck: 79%    Motorcycle: <1%    Metro Bus or Metro Rail: 9%  
Other (Bicycle, Taxi, Walking, etc.): <1%

**Multiple Modes to Work**

Drive then Bus or Rail: 9%    Metro Bus and Metro Rail: 1%    Drive or Bus then Other: <1%

Valid: 2130

Not Answered: <1%

**41. a. If you do not use Metro Bus or Metro Rail to get to work, could you?**

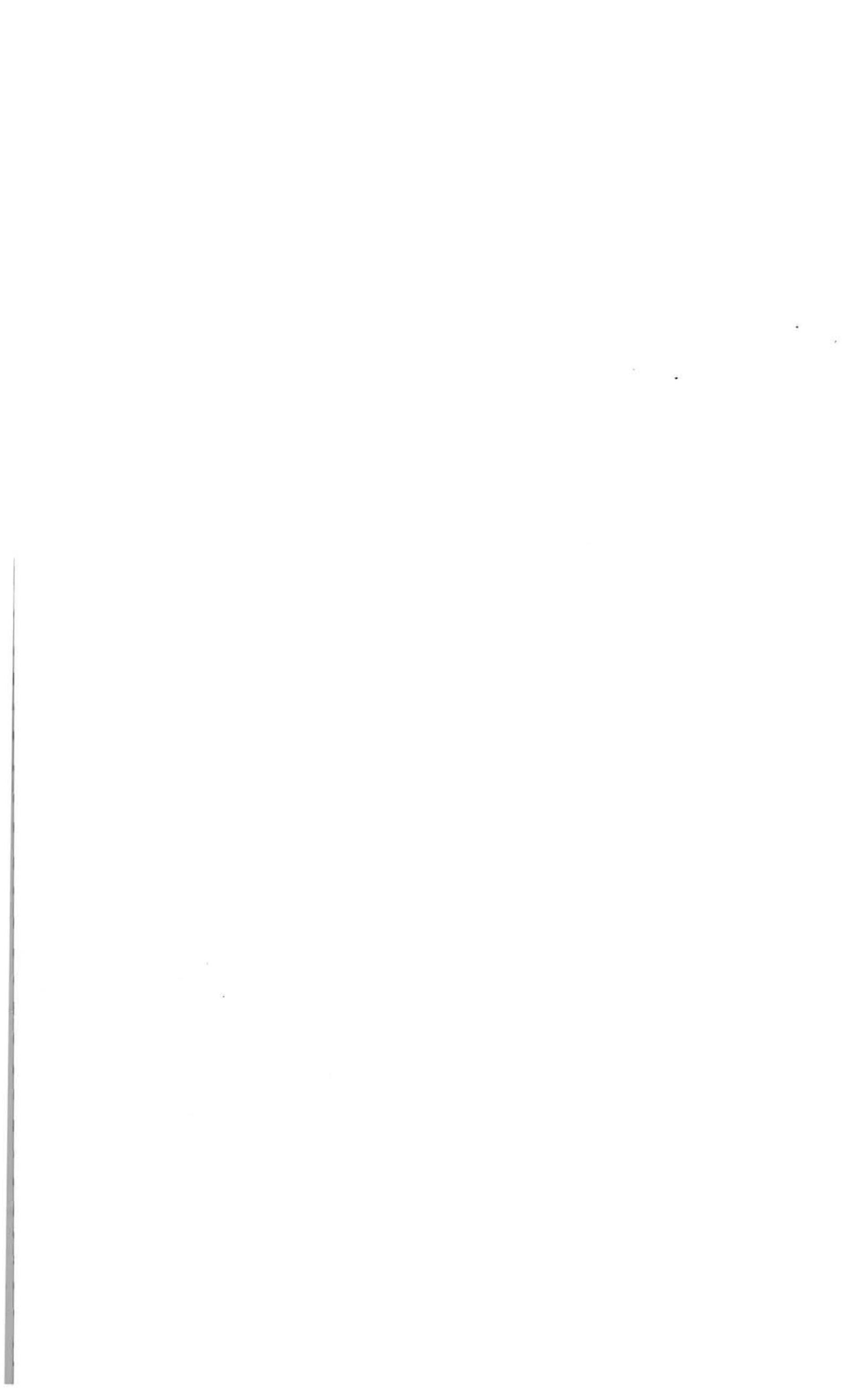
Yes: 68%    No: 29%  
Valid: 1710    Not Answered: 3%

**b. If yes, why didn't you? (Top Reasons Given)**

- Problem with Bus Schedules and Connections (33%)
- Takes Too Long (16%)
- Need Car for Errands or Emergencies (14%)
- Bus Stop Locations Too Far from House or Work (9%)
- Too Expensive (3%)

Valid: 1412

Not Answered: 6%



**42. If you were in a car, van or truck, how many persons were in the vehicle (including yourself) when you arrived downtown?**

One [you]: 80% · Two: 16% Three: 2% Four or more: <1%  
 Valid: 1811 Not Answered: 2%

**43. How many stops do you typically make on your way to work (e.g., pick up/drop off a passenger; go to store)?**

None: 72% One: 19% Two: 4% Three: <1% Four or more: <1%  
 Valid: 2078 Not Answered: 4%

**44. How far do you currently park from work?**

One Block: 45% Two Blocks: 13% Three or more: 16% Not Applicable: 21%  
 Valid: 2056 Not Answered: 5%

**45. How far was the closest Metro stop from work?**

One Block: 58% Two Blocks: 14% Three or more: 13% Don't know: 12%  
 Valid: 2130 Not Answered: 3%

**46. a. Do you use a Metro Park & Ride Lot?**

Yes: 34% No: 62%  
 Valid: 308 Not Answered: 4%

**b. If yes, which one?**

South Campus	30%	Apple Tree Mall	2%
LaSalle	28%	Woodlawn	1%
Athol Springs	11%	Seneca & Casenovia Park	1%
Hamburg	4%	Harris Hill Road	1%
Main & Union	3%	Perry & Michigan (Shuttle Lot)	1%
Boston / North Boston	2%	Del-Ton Plaza	1%
Allright Parking (Main & Scott)	2%	Civic (Perry & Louisiana)	1%
Transitown Plaza	2%		

Valid: 109 Not Answered: 11%

**47. On a scale of 1 - 6, how would you rate each of the following with regard to making your daily transportation choice?**

	Not Important			Very Important			
Cost of parking	13%	4%	8%	11%	17%	43%	4%*
Total cost of trip by car (tolls, gas, insurance, parking)	13%	9%	15%	15%	16%	28%	4%*
Cost of bus/rail fare	30%	10%	14%	12%	11%	18%	5%*
Convenience	2%	1%	4%	8%	21%	61%	3%*
Safety/security	2%	2%	6%	10%	22%	55%	3%*
Flexibility during the day	2%	2%	5%	9%	19%	60%	3%*

Valid: 2130 \*Not Answered

