Northside Market Data

This consolidated data package was assembled from raw ESRI data provided by the Urban Redevelopment Authority for a startup business, *Bistro To Go*

by Randy Strothman Randy Strothman & Associates RandyStrothman@comcast.net 412-322-9720





Preliminary East Ohio demographic & economic data analysis 4 drive radii from Middle and East Ohio Streets

Resident Population Characteristics

Resident Population		4 drive radii			
(ESRI data)	<u>2006 est.</u>	<u>2011 est.</u>	% change		
2-minute drive	9,330	9,774	-2.75%		
5- minute drive	68,481	66,680	-2.65%		
10-minute drive	465,333	454,645	-2.30%		
30-minute drive	1,437,184	1,420,514	-1.15%		

(2006 ESRI data)	2-minute	<u>5-minute</u>	10- minute	30-minute	<u>USA</u>
Median age	39.9	35.7	38.6	41.7	36.2
Average HH size	1.88	2.13	2.15	2.32	
Median HH income	\$24,262	\$29,215	\$40,777	\$38,589	
Average HH income	\$39,441	\$42,738	\$57,579	\$53,880	\$64,816
% HH income > \$50,000	26%	30%	41%	38%	
% HH income < \$15,000	35%	28%	18%	16%	
% Bachelor+ degrees	18%	16%	28%	28%	25%
% African-American	39%	42%	19%	13%	12%
% no vehicles	49%	38%	23%		

(2006 ESRI data)	2-minute	<u>5-minute</u>	10- minute	30-minute
HH Types (2000)	4,930	29,801	212,006	605,974
- Family	40%	51%	54%	63%
- NonFamily	60%	49%	46%	37%
HHs by size (2000)				
- 1 person	50%	41%	38%	32%
- 2 persons	27%	28%	31%	33%
- 3 persons	12%	12%	14%	16%
- 4+ persons	11%	18%	16%	20%
HH: rent vs. own (2006)	6,133	34,760	235,137	659,305
- owner occupied	28%	38%	51%	63%
- renter occupied	50%	43%	39%	28%
- vacant	23%	18%	10%	9%

Business Type Analysis: Current Supply and Demand

Leakage/undersupply and Surplus/oversupply

High negative numbers indicate a large oversupply of businesses for the resident population; positive numbers indicate an undersupply. Food categories are highlighted here.

SUPPLY & DEMAND	Leakag	e/under s	supply (+)	or overs	upply (-)
Food Industry summary	2 min.	<u>5 min.</u>	10 min.	30 min.	30-min. \$ demand
TOTAL retail trade & food & drink	-67	-43	-8	-2	\$16,820,072,000
- subTOTAL retail trade	-68	-43	-10	-3	1,437,311,500
- subTOTAL food & drink	-48	-40	6	6	2,446,957,000
East Ohio type categories					
Drinking places (alcoholic)	-64	-65	-10	44	\$371,800,000
Special food services	-71	-64	1	-1	\$195,917,713
Limited-service eating places	-50	-48	-4	0.3	881,134,000
Full-service restaurants	-38	-24	14	4	998,103,000
Vending machine operators	-31	-15	-38	14	710,463,000
Electronic shopping & mail order houses	100	-86	-54	-46	279,040,000
Misc. store retailers	-82	-75	-36	6	438,251,000
Florists	-30	-53	-14	-9	33,203,000
Off. supplies, stationary, gifts	-50	-38	3	5	148,299,000
Used merchandise stores	-96	-84	-63	12	65,292,000
Book, periodical, music stores	-71	-71	-12	21	158,785,000
Jewelry, luggage, leather stores	-85	-84	-43	-27	77,497,000
Shoe stores	-59	-46	0	-39	43,208,794
Clothing stores	-51	-48	-8	-14	496,143,000
Beer, wine, liquor stores	-43	-28	5	50	249,276,000
Specialty food stores	-86	-86	-36	-6	58,528,000
Grocery stores	51	-5	-8	-4	1,925,502,724
Lawn, garden equip. & supplies stores	35	18	11	38	73,115,000
Electronic & appliance stores	-84	-80	-39	3	421,909,000
Home furnishings stores	3	-58	-17	-26	118,827,000
Furniture stores	37	44	31	21	212,376,000
NonEO-type categories					
Auto parts & tire stores	-20	-5	15	21	\$320,267,000
Other motor vehicle dealers	100	39	55	47	219,426,000
Auto dealers	84	51	4	6	3,443,305,000
(note: not all retail NAICS categories are listed here)					

Resident Consumer Spending: Part A

NOTE: only the top 20 categories are listed here. **BOLD** categories are MAJOR ones with subsets; many categories here are not mutually exclusive. *Bistro To Go's* category is highlighted in blue; other food categories are highlighted in red.

5- minute radius

Population 2006: 60,481 Households: 28,397 Families: 13,833 Median age: 35.7 Median HH inc.: \$29,215

10- minute radius

 Population 2006:
 465,333

 Households:
 204,981

 Families:
 106,397

 Median age:
 38.6

 Median HH inc.:
 \$40,777

Spending by household	5-minute	radius	3	10-minute	radius	
Category	T Spending Avg. SPI		SPI	T Spending	Avg.	SPI
1. Food	\$151,102,387	\$3,179	65	\$1,425,661,919	\$6,955	84
2. Home: Mortgage Payments, Taxes, Insur.	115,734,246	4,075	50	1,226,928,200	5,985	73
3. Financial: Vehicle Loans	98,129,310	3,455	58	947,640,714	4,623	78
4. Transp.: Vehicle Purchases (net outlay)	97,755,378	3,442	59	946,342,636	4,616	79
5. Food: at Home	90,286,690	3,179	65	845,456,505	4,124	84
6. Home: Utilities, Fuel & Public Svs.	77,312,925	2,722	64	730,690,029	3,564	84
7. Financial: Investments	73,287,155	2,580	55	762,418,204	3,719	80
8. Food: Away from Home	60,815,697	2,141	64	580,205,414	2,830	85
9. Entertainment	55,580,137	1,957	59	546,499,630	2,666	81
10. Apparel & Services	36,578,168	1,288	47	349,098,174	1,703	63
11. Insurance: Health	32,405,547	1,141	63	311,362,236	1,518	84
12. Transp.: Gasoline & Oil	31,854,704	1,121	61	304,478,291	1,485	80
13. Food at Home: Snacks & Other Food	27,686,191	974	64	260,329,052	1,270	84
14. Home: Maint. & Remodeling Services	25,591,996	901	51	273,464,597	1,334	75
15. Insurance: Vehicle	23,966,184	843	61	230,821,704	1,126	82
16. Food at Home: Meat, Poultry, Fish, Eggs	23,902,010	841	65	221,562,143	1,080	84
17. Entertainm't: TV/Video/Sound Equip.	20,225,199	712	65	191,600,355	934	86
18. Transp.: Vehicle Maint. & Repair	18,390,185	647	60	178,649,400	871	81
19. Food at Home: Fruit & Vegetables	15,694,521	552	64	147,589,128	720	84
20. Food at Home: Bakery & Cereal Products	13,307,794	468	65	124,550,561	607	84

Resident Consumer Spending: part B, Foods

The following data comes from a Strip District Market Hall study done in 2006 and compares local Spending Potential in three distinct bands to a national average of 100.

2010 Projections: Foods	1 mile band	<u>1-5 mi. band</u>	5-20 mi. band	USA avg.
Food at Home—overall	74	89	102	100
Food Away From Home—overall	62	87	102	100
Specialty Foods: Market Hall categ	ories			
- baked goods	74	93	109	100
- dairy	73	92	107	100
- meat	90	94	103	100
- prepared foods	62	82	97	100
- fruits and vegetables	76	90	104	100
- seafood	66	77	91	100
- sweets	66	87	105	100
- beverages-non alcoholic	63	81	92	100

Nearby employment: top 7 major categories

7 Top employment categories	2 minute drive time*					5-	minute	*	
(by SIC code)	busine	sses	employi	nent		busin	esses	employm	ent
Finance, Insur., Real Est.: Insurance	26	2%	2,929	14%		153	2%	15,258	11%
Services: other services	263	26%	2,919	14%		1,642	25%	20,188	15%
Manufacturing	38	4%	2,360	11%		233	4%	8,971	7%
Finance, etc.: Real Est., Holding, etc.	38	4%	1,704	8%		271	4%	11,024	8%
Services: Legal	72	7%	1,614	8%	1	834	13%	11,233	8%
Services: Health	143	14%	1,507	7%		445	7%	6,205	5%
Finance, etc.: Securities Brokers	22	2%	1,166	6%		128	2%	8,908	7%
subTotal employment - above 7	602	59%	14,199	67%		3,706	56%	81,787	61%
Total employment - all employers	1,024	100%	21,168	100%		6,618	100%	133,778	100%

Residents: Lifestyle segments

The charts of ESRI demographic data on the next 3 pages identify <u>consumer lifestyles</u> within the Primary Trade Area of East Ohio Street. ESRI calls their system "Community Tapestry—The Fabric of America's Neighborhoods" and says this segmentation "provides an accurate, detailed description of America's Neighborhoods. Using proven segmentation technology introduced more than 30 years ago, Community Tapestry classifies U.S. Neighborhoods based on their socioeconomic and demographic composition." It breaks down the population into:

- 65 lifestyle segments
- 12 LifeMode summary groups
- 11 Urbanization summary groups

Resulting from a specialized mining demographic and economic data, these lifestyle segments can be useful in targeting promotions and advertising because they help to describe the potential customer in a more life-like way. The chart below summarizes the top 4 segments in each radius:

Tapestry Lifestyle Segment Summary Top 4 segments for North Side <u>resident</u> demographics

<u>LifeMode Groups</u>	2-min. drive	5-min. drive	10-min. drive
• L4- Solo Acts urban young singles on the move	36. Old & Newcomers		
• L5- Senior Styles senior lifestyles by income, age, and housing type	57. Simple Living 65. Social Security Set	57. Simple Living	29. Rustbelt Retirees 57. Simple Living
• L6- Scholars & Patriots college, military environments	55. College Towns		
• L7- High Hopes young households striving for the American Dream			48. Great Expectations
• L9- Family Portrait youth, family life & children		64. City Commons	
• L10- Traditional Living middle-aged, middle income—Middle America		32. Rustbelt Tradions	32. Rustbelt Traditions
• L11- Factories & Farms hardworking families in small communities, settled near jobs		53. Home Town	

NOTE: These following residential Life Style Segment statistics do <u>not</u> reveal the potential markets for non resident consumers, including 1) the tens of thousands of employees working nearby and downtown or 2) the 2,000,000+ tourists and nearby event attendees.

Radius 1: Closest Consumers

2-minute drive— 2006 <u>resident</u> population <u>Top four</u> ESRI Community Tapestry segments

This nearby local population data is extrapolated from 2000 census data. Note that the figures on this page do <u>not</u> account for the new boom in condo and apartment development in Pittsburgh's CBD, on the North Shore and in the Strip District. The anticipated occupants in these new units will increase the percentage of middle and upper middle income consumers.

(NOTE: radius from East Ohio and Middle Streets; SPI is Spending Potential Index and represents the amout spent for a product or service relative to a national average of 100.

2- minute drive = 9,330 population					
Tapestry segment	рор.	% of T			
57. Simple Living	2,461	26%			
65. Social Security Set	1,444	16%			
36. Old & Newcomers	1,227	13%			
55. College Towns	943	10%			
pop. in Top 4 categories	6,075	65%			

Top 3 spending categories	(an	nual)
(median HH income = \$24,262)	SPI	Avg. spent
#1 SPI: apparel products & svs.	95	\$140
#2 SPI: school books & supplies	79	\$93
#3 SPI: moving/storage/etc.	69	\$36
#1 expense: mortgage & ins.	42	\$3,399
#2 expense: vehicle purchases	53	\$3,059
#3 expense: vehicle loans	52	\$3,082
#4 expense: food at home	60	\$2,972

rank— pop. % income level

Segment Number and Name

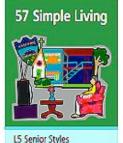
> Segment Illustration

LifeMode Group Urbanization Group

HH Type Median Age Income Employment Education Residential Race/Ethnicity

Activity
Financial
Activity
Media
Vehicle

#1—26% lower middle



Singles 40.1 Lower Middle Prof/Mgmt/Skilled/Srvc No HS Diploma; HS Grad Multiunits; Single Family White

U6 Urban Outskirts II

Own cats
Have personal education
loan
Go dancing
Watch syndicated TV
Own/Lease Buick

#**2**—16%



U2 Principal Urban Centers II Singles 44.6 Low Retired/Prof/Mgmt/Srvc No HS Diploma; HS Grad High-Rise Rentals White; Black

fraternal order, veterans club Own stock worth less than \$75,000 Attend movies once a week or more Watch game shows Own/Lease Buick #**3**—13% middle



L4 Solo Acts
U4 Metro Cities II
Singles; Shared
36.6
Middle
Prof/Mgmt/Srvc
Some College; Bach/Grad
Multiunit Rentals
White
Multimedia software and

Multiunit Rentals
White
Multimedia software and books
Own shares in mutual fund (bonds)
Bingo and roller-blading
Listen to classic hits radio
Own/Lease Oldsmobile

#**4**—10% lower middle



L6 Scholars and Patriots U6 Urban Outskirts II Singles; Shared 24.5 Lower Middle Students/Prof/Mgmt/Srvc Some College; Bach/Grad Multiunit Rentals White

Participate in environmental group Have personal education loan Attend college sports events, go to bars Watch MTV, Comedy Central Own/Lease compact car

Radius 2: Nearby Consumers

5-minute drive—2006 <u>resident</u> population <u>Top four</u> ESRI Community Tapestry segments

Note that the figures on this page do not account for the new boom in condo and apartment development in Pittsburgh's CBD, on the North Shore and in the Strip District. The anticipated occupants in these new units will increase the percentage of middle and upper middle income consumers.

5- minute drive = 68,484 population					
Tapestry segment	рор.	% of T			
57. Simple Living	10,242	15%			
64. City Commons	8,563	12%			
32. Rustbelt Traditions	5,589	8%			
53. Home Town	4,608	7%			
pop. in Top 4 categories	29,002	42%			

Top 3 spending categories	(ar	ınual)
(median HH income = \$29,215)	SPI	Avg. spent
#1 SPI: apparel products & svs.	95	\$140
#2 SPI: school books & supplies	75	\$88
#3 SPI: rent & repair TV/sound	72	\$4
#1 expense: mortgage & ins.	50	\$4,076
#2 expense: vehicle loans	58	\$3,456
#3 expense: vehicle purchases	59	\$3,442
#4 expense: food at home	65	\$3,179

rank—pop. % income level

#1—15%

#2—12% low

#3—8% middle

#4--7% lower middle

Segment Number and Name

> Segment Illustration

LifeMode Group Urbanization Group

HH Type

Median Age Income

Employment

Education

Residential

Race/Ethnicity

Activity

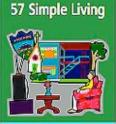
Financial

Activity

Media

Vehicle

lower middle



L5 Senior Styles U6 Urban Outskirts II

Singles 40.1

Lower Middle Prof/Mgmt/Skilled/Srvc No HS Diploma; HS Grad

Multiunits; Single Family White

Own cats

Have personal education

loan Go dancing

Watch syndicated TV Own/Lease Buick

64 City Commons

L9 Family Portrait U2 Principal Urban Centers II Single-Parent Fams; Singles 24.2

Low

Services

No HS Diploma; HS Grad

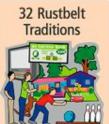
Multiunit Rentals Black

Buy baby/children's products

Bank online

Own 3+ cell phones Listen to urban and gospel

Own/Lease Mercury



L10 Traditional Living U5 Urban Outskirts I

Mixed 35.9

Middle

Skilled/Prof/Mgmt/Srvc HS Grad; Some College Single Family

White

Hunting and shooting Use credit union

Belong to veterans' groups Watch or listen to ice hockey games

Own/Lease Pontiac



L11 Factories and Farms U8 Suburban Periphery II

Mixed 33.7

Lower Middle Skilled/Services

No HS Diploma; HS Grad

Single Family White

Play baseball, fish Own CD (6 months or less)

Play video games Watch syndicated TV

Radius 3: Other City & County Consumers

10-minute drive —2006 <u>resident</u> population **Top four ESRI Community Tapestry segments**

10- minute drive = 465,332 population			
Tapestry segment	рор.	% of T	
29. Rustbelt Retirees	59,925	13%	
57. Simple Living	45,976	10%	
32. Rustbelt Traditions	35,977	8%	
48. Great Expectations	30,193	6%	
pop. in Top 4 categories	172,071	37%	

Top 3 spending categories	(annual)	
(median HH income = \$40,777)	SPI	Avg. spent
#1 SPI: apparel products & svs.	121	\$179
#2 SPI: School books & supplies	100	\$118
#3 SPI: rent & repair TV/sound	92	\$6
#1 expense: mortgage & ins.	73	\$5,986
#2 expense: vehicle loans	78	\$4,623
#3 expense: vehicle purchases	79	\$4,616
#4 expense: food at home	84	\$4,124

rank— pop. %

income level

#1—13% middle

#2—10% lower middle #3—8% middle

#4---6% lower middle

Segment Number and Name

> Segment Illustration

LifeMode Group Urbanization Group

HH Type

Median Age Income

Employment

Education Residential Race/Ethnicity

Activity Financial Activity Media Vehicle

29 Rustbelt Retirees

U8 Suburban Periphery II MC w/No Kids; Singles 43.8 Middle Prof/Mgmt/Skilled/Srvc

L5 Senior Styles

HS Grad; Some College Single Family White

DIY home improvement Own shares in tax-exempt Belong to fraternal orders, unions, etc. Watch QVC

Own/Lease Buick

57 Simple Living

L5 Senior Styles U6 Urban Outskirts II Singles 40.1 Lower Middle Prof/Mgmt/Skilled/Srvc No HS Diploma; HS Grad Multiunits; Single Family White

Own cats Have personal education Go dancing Watch syndicated TV

Own/Lease Buick

32 Rustbelt **Traditions**

U5 Urban Outskirts I Mixed 35.9 Middle Skilled/Prof/Mgmt/Srvc HS Grad; Some College Single Family White

L10 Traditional Living

Hunting and shooting Use credit union Belong to veterans' groups Watch or listen to ice hockey games Own/Lease Pontiac



L7 High Hopes U5 Urban Outskirts I

Mixed 33.0

Lower Middle Prof/Mgmt/Skilled/Srvc HS Grad; Some College

Single Family; Multiunits White

Roller-skating, softball Have personal education

Listen to rock radio format Watch cable and syndicated TV

Own/Lease Mercury