DOWNTOWN LOS ANGELES

Demographic Study 2013

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Introduction

"Downtown LA has truly become a vibrant 24/7 urban center. The community welcomes growth and new businesses for all the right reasons."

-Carol E. Schatz
President & CEO, Downtown Center Business Improvement District

We are pleased to present the Downtown Center Business Improvement District's **Downtown Los Angeles Demographic Study 2013**. The Study confirmed that Downtown LA is ***the*** place to open businesses and invest.

The Downtown LA population is highly educated, affluent, and employed at levels that exceed city and county averages. Life Downtown is vibrant and rich with easy access to public transit, distinctive shopping, and cultural enjoyment. Despite the growth of amenities the residents, office workers, and visitors demand more ways to spend their considerable disposable income on dining, shopping, and entertainment.

Downtown LA is growing more quickly than the rest of the city and will most likely continue to do so in the near future. The rapid construction of housing, hotels, and mixed-use buildings, and the multitude of new store openings, verify Downtown's business-friendly climate. The community welcomes growth and new businesses for all the right reasons.

Those who have opened a business here and delivered the right products have prospered.

Welcome to Downtown Los Angeles 2013.

Carol E. Schatz, President & CEO

Executive Summary

KEY FINDINGS

The data in the Downtown Los Angeles Demographic Study 2013 confirms Downtown Los Angeles is a growing community that hungers for more of just about everything that a big city center traditionally offers. The Study not only solidly indicates positive and sustainable trends, it also reveals that the Downtown population continues to grow, is highly educated, affluent, and employed at levels that exceed city and county averages.

Median household income in Downtown LA has increased by 10% since 2011… far outpacing the median household income of LA County residents overall. The attributes of this population – young, highly educated, well-employed, high earning – have remained steady through the good times, the recession, and into the current economic recovery.

26% of residents earn $150,000+ compared to 20% in 2011… and residents overall have a median household income of $98,700.

The Downtown LA resident population has grown by 6,880 since 2011 & 23,520 since 2006. The sustained growth and development of Downtown LA provides an opportunity for more options for quality housing, distinctive retail, and iconic entertainment, cultural, and dining options.

71% of Downtown LA residents are currently renting their primary residence.

THE DOWNTOWN LA RESIDENT 2013

53%	Female
34	Median Age
75%	Between 23 – 44
41%	Married/Partnered
56%	Work Downtown
$98,700	Median Household Income
91%	Employment Rate

76% of total respondents (residents, workers & visitors) have earned a four-year undergraduate or graduate/post-graduate degree. At 80%, the number is even higher for Downtown LA residents.

56% of residents also work in Downtown LA; almost 55% are Top Management; with 20% in Law, Accounting, Advertising and **17% in Arts & Entertainment;** 34% use their home as a primary or secondary office.

Downtown LA has grown at a faster pace than the rest of the city in terms of employment, business formation, and housing. The trend lines indicate it **will most likely continue to do so in the near future.**

Since 2011, Downtown LA has welcomed… CityTarget, Sport Chalet, Ross Dress for Less and **Smart & Final,** with **Urban Outfitters, Zara, Acne Studios,** and **Whole Foods** on the way.

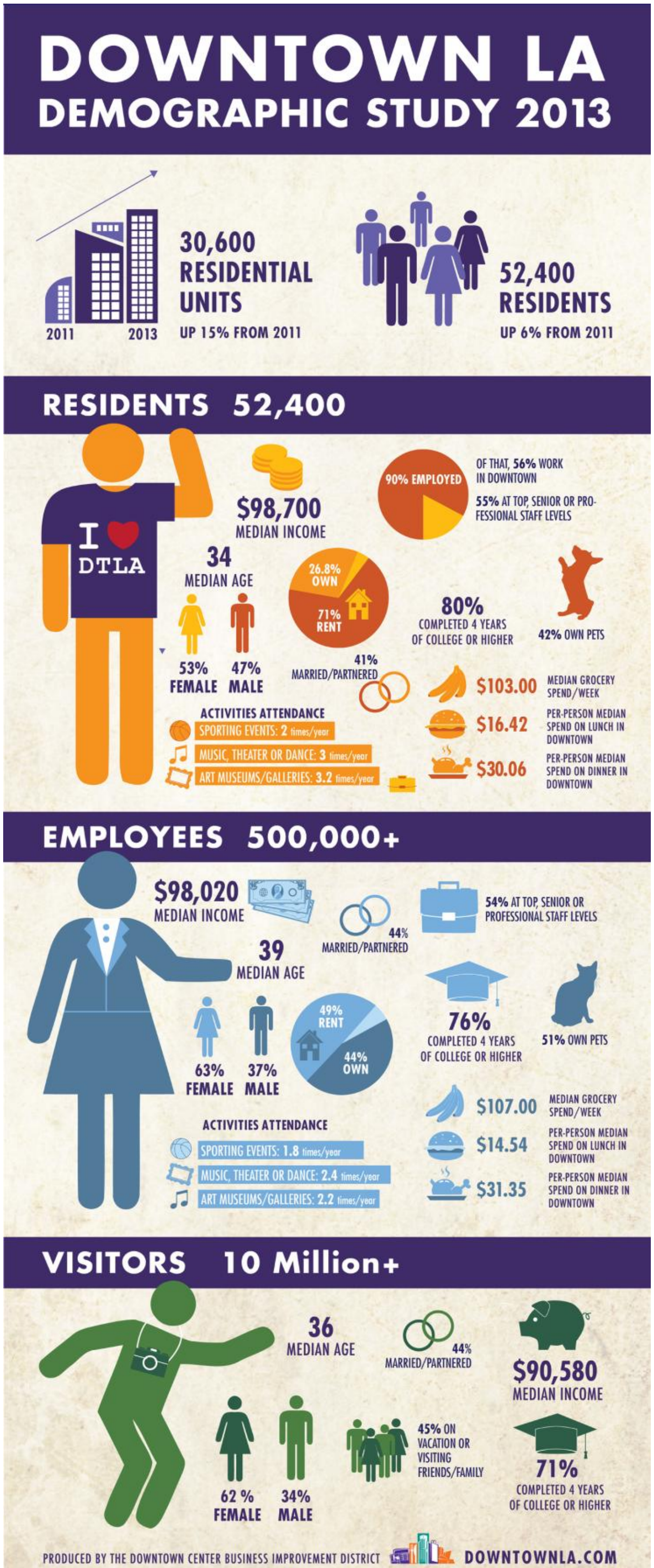
What do Downtowners want…?

All segments surveyed – **residents, workers, and visitors** – would like to see more retail, especially mid-level department stores and restaurants. Respondents **desire Nordstrom,** an **Apple Store**, a **Trader Joe's** and **Bed, Bath & Beyond.**

- **58% want more mid-level restaurants**
- **55% want mid-level department stores; 67% named Nordstrom**
- **46% want discount fashion retail**; 39% named **H&M**
- **47% want home furnishing stores**; 42% named **Bed Bath & Beyond**
- **48% want more book / music stores**; 48% named **Barnes & Noble**
- **45% want electronics retailers**; 50% cited **Apple Store**

These findings make Downtown LA unique among neighborhoods in the city and the region. Elsewhere in the region we see a persistent theme of residents fighting growth and development in their neighborhoods, including transit improvements, shopping, housing and commercial projects. This is not the case in Downtown Los Angeles.

Most importantly, the 2013 Study strongly indicates that while already enjoying the many new restaurants, stores, and entertainment venues available in **Downtown LA, residents, workers and visitors want even MORE.** And, they want these opportunities right here in their neighborhood - in the new Downtown LA.


DOWNTOWN LA
DEMOGRAPHIC STUDY 2013
2011
2013
30,600
RESIDENTIAL
UNITS
UP 15% FROM 2011
52,400
RESIDENTS
UP 6% FROM 2011
RESIDENTS 52,400
I DTLA
$98,700
MEDIAN INCOME
90% EMPLOYED
OF THAT, 56% WORK IN DOWNTOWN
55% AT TOP, SENIOR OR PROFESSIONAL STAFF LEVELS
34
MEDIAN AGE
26.8% OWN
71% RENT
80%
COMPLETED 4 YEARS OF COLLEGE OR HIGHER
42% OWN PETS
53% FEMALE
47% MALE
41% MARRIED/PARTNERED
$103.00 MEDIAN GROCERY SPEND/WEEK
$16.42 PER-PERSON MEDIAN SPEND ON LUNCH IN DOWNTOWN
$30.06 PER-PERSON MEDIAN SPEND ON DINNER IN DOWNTOWN
ACTIVITIES ATTENDANCE
SPORTING EVENTS: 2 times/year
MUSIC, THEATER OR DANCE: 3 times/year
ART MUSEUMS/GALLERIES: 3.2 times/year
EMPLOYEES 500,000+
$98,020
MEDIAN INCOME
44% MARRIED/PARTNERED
54% AT TOP, SENIOR OR PROFESSIONAL STAFF LEVELS
39
MEDIAN AGE
49% RENT
44% OWN
76%
COMPLETED 4 YEARS OF COLLEGE OR HIGHER
51% OWN PETS
63% FEMALE
37% MALE
$107.00 MEDIAN GROCERY SPEND/WEEK
$14.54 PER-PERSON MEDIAN SPEND ON LUNCH IN DOWNTOWN
$31.35 PER-PERSON MEDIAN SPEND ON DINNER IN DOWNTOWN
ACTIVITIES ATTENDANCE
SPORTING EVENTS: 1.8 times/year
MUSIC, THEATER OR DANCE: 2.4 times/year
ART MUSEUMS/GALLERIES: 2.2 times/year
VISITORS 10 Million+
36
MEDIAN AGE
44% MARRIED/PARTNERED
$90,580
MEDIAN INCOME
45% ON VACATION OR VISITING FRIENDS/FAMILY
71%
COMPLETED 4 YEARS OF COLLEGE OR HIGHER
62 % FEMALE
34% MALE
PRODUCED BY THE DOWNTOWN CENTER BUSINESS IMPROVEMENT DISTRICT
DOWNTOWNLA.COM

	Residents	Employees	Visitors	Total Respondents
MEDIAN HOUSEHOLD INCOME				
Income (with wage earner in household)	$98,700	$98,020	$90,580	$95,900
EMPLOYMENT				
Employment Rate	90.3%	98.9%	92.8%	93.5%
Work Downtown	56.4%	94.6%	64.1%	71.4%
Staff level: Executive/Senior Staff/Manager	54.5%	53.9%	51.6%	52.8%
Field: Business & Professional Services (Law, Accounting, Advertising)	20.3%	24.9%	24.0%	24.9%
Field: Arts and Entertainment	16.6%	5.6%	9.3%	9.4%
Field: Financial/Insurance Services	7.3%	14.7%	10.5%	11.8%
Field: Government	5.0%	9.5%	8.8%	8.0%
COMMUTING				
Commute to Work	88.1%	95.6%	93.8%	93.1%
Commute to Work – Alone by car	48.6%	50.5%	58.6%	54.3%
Commute to Work – Public Transit	25.5%	35.8%	39.6%	34.8%
EDUCATION				
4 yrs of college+	80.1%	76.0%	71.0%	76.2%
Mean yrs of education	16.8	16.6	16.4	16.6
Likely to send kids to quality DTLA preschool	88.8%	57.2%	57.0%	60.0%
AGE, GENDER, ETHNICITY				
Median age (years)	33.5	39.0	36.4	37.4
Age 23-29	27.6%	18.9%	23.5%	21.6%
Age 30-34	23.1%	17.9%	18.3%	18.2%
Age 35-44	24.1%	25.1%	22.9%	23.9%
Female	52.9%	62.9%	61.6%	61.0%
Male	47.1%	37.1%	38.4%	39.0%
Caucasian	52.7%	48.0%	47.8%	49.0%
Asian-American/Pacific Islander	20.1%	16.7%	16.7%	16.9%
Hispanic/Latino	17.0%	21.6%	23.2%	21.0%
African-American	6.2%	8.3%	8.8%	8.0%

	Residents	Employees	Visitors	Total Respondents
HOUSEHOLD CHARACTERISTICS				
Own primary residence	26.8%	44.1%	39.9%	39.7%
Rent primary residence	70.8%	48.6%	50.6%	53.2%
Median years at primary residence	1.8	3.2	3.0	2.8
Household size (avg.)	1.8	2.3	2.2	2.2
Home Office (primary or secondary)	34.1%	22.1%	29.0%	27.0%
Single (not married/partnered)	51.7%	41.9%	45.0%	44.5%
Married/Partnered	40.6%	44.3%	44.0%	45.8%
Children >5 yrs	6.2%	12.1%	9.9%	10.3%
Children 5-18 yrs	4.8%	16.2%	14.6%	13.8%
Pet owner	42.0%	51.0%	51.0%	49.0%
Dog owner	29.9%	36.1%	34.9%	34.4%
Cat owner	14.2%	19.0%	19.8%	18.2%
SHOPPING				
Wanted More Mid-level Dept. Stores	60.2%	54.9%	54.8%	54.6%
Wanted More Mid-level Restaurants	63.6%	55.7%	63.5%	58.3%
Wanted More Books/Music/Movie Stores	48.4%	46.3%	52.5%	48.0%
Wanted More Electronics Stores	52.0%	43.4%	46.1%	44.7%
Wanted More Home Furnishing Stores	57.8%	44.7%	45.8%	46.8%
Wanted More Fashion Retailers	54.6%	45.1%	46.2%	46.1%
GROCERIES				
Median Grocery Spend per Week	$103	$107	$103	$105
Median Travel for Groceries (miles)	2.1	1.8	1.8	1.8
Shop at Ralphs	72.7%	59.4%	59.7%	61.8%
Shop at Trader Joe's	67.8%	71.0%	73.7%	70.2%
Likely to Shop at Trader Joe's if Downtown	90.3%	80.8%	77.2%	80.1%
Likely to Shop at Whole Foods if Downtown	73.3%	59.3%	57.0%	60.3%
DINING OUT, NIGHTLIFE & ACTIVITIES				
Lunch Out Downtown at least 1x/month	90.7%	94.9%	87.2%	89.6%
Median Lunch Out Downtown Spend	$16.42	$14.54	$15.37	$15.22
Dinner Out Downtown at least 1x/month	93.2%	64.5%	73.0%	70.5%
Median Dinner Out Downtown Spend	$30.06	$31.35	$30.03	$30.45
Median Frequency/year: Dining/Nightlife	20.5	6.1	8.1	7.9
Median Frequency/year: Sporting Events	2.0	1.8	2.0	1.7
Median Frequency/year: Shopping	12.1	6.0	6.1	6.3
Median Freq./year: Music, Theater, Dance	3.0	2.4	2.8	2.5
Median Freq./year: Art, Museums/Galleries	3.2	2.2	2.7	2.4

BACKGROUND

About the Downtown Center Business Improvement District

The Downtown Center Business Improvement District (DCBID) is a coalition of commercial and residential property owners encompassing a 65-block district in the heart of Downtown LA that funds safety, cleanliness, economic development, and marketing programs to bring more economic growth and vitality to the District.

Purpose

The Study was the fourth survey produced by the DCBID to improve the organization's ability to recruit and retain retailers, restaurants, and other businesses and amenities. The Study collected comprehensive market research on the demographic characteristics of the current population of Downtown LA residents, employees, visitors, and others.

The DCBID retained Lauren Schlau Consulting to conduct the Study and to compare the results against the Downtown Los Angeles Demographic Survey 2011.[1]

Methodology

The 2013 Study was an Internet-based questionnaire hosted on the DCBID's website from mid-March to mid-April 2013. To publicize the Study, the DCBID conducted an extensive outreach effort throughout Downtown LA that included advertisements, postcards, and door hangers directing respondents to access the questionnaire at DowntownLA.com/survey.

A self-selecting sample of 8,841 respondents across the Downtown LA area participated. It was not a "census" but rather a comprehensive survey of Downtown LA consumers. Respondents were categorized by residence and activities as follows. Note, as some of these categories are not mutually exclusive (some can qualify in more than one category), numbers do not add to 100%.

Residents: Respondents who lived in Downtown LA during the Study. There were 3,708 respondents in this category, or 42% of the total. Of those Residents, 1,977 or 22% lived and worked in Downtown LA.
Employees: Respondents who worked in Downtown LA during the Study (they lived in Downtown LA or elsewhere). There were 6,018 respondents in this category or 68% of the total.
Visitors: Respondents visiting Downtown LA for business or pleasure. There were 3,746 respondents in this category or 42% of the total.

[1] Downtown Center Business Improvement District, Downtown Los Angeles Demographic Survey 2011

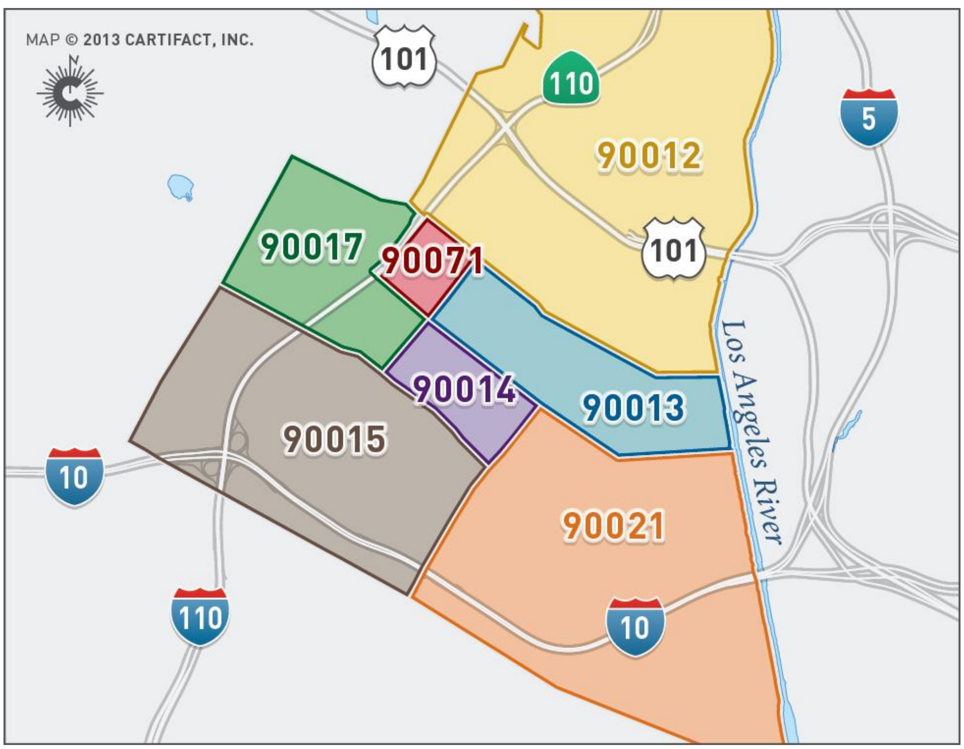
Methodology, continued

We also asked the type of Downtown activities all respondents engaged in:
4,759 or 54% attended live arts performances Downtown at least four times per year
2,606 or 30% attended live sports events Downtown at least four times per year

The respondents were identified by their area of residence:
42% or 3,708 respondents lived in Downtown LA
53% or 4,659 respondents lived in LA County (outside of Downtown LA)
5% or 474 respondents lived elsewhere (outside of Downtown LA or LA County)

Definition of Downtown LA

The Downtown LA "population" was defined as residents, employees, visitors, and others who were in Downtown LA for a variety of reasons including business, shopping, and cultural, sports, or special events. Downtown LA was defined as the area within the zip codes 90012, 90013, 90014, 90015, 90017, 90021, and 90071 and the area bounded by the 101 Freeway and Chinatown area to the north; the Los Angeles River to the east; the 10 Freeway to the south; and the 110 Freeway and City West area to the west.



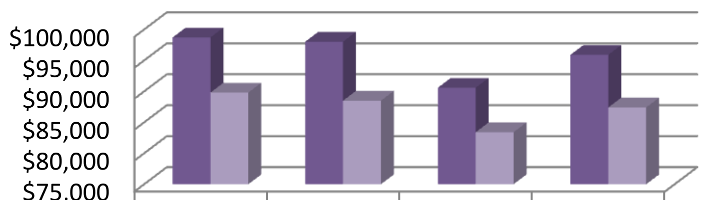
Detailed Findings

Income

Median household income (with wage earner) increased by 10%.

- The income of **Total Respondents** increased by 10% to $95,900 compared to $87,400 in 2011. This figure also surpassed the pre-recession figure of $95,800 in 2008.
- The income of **Residents** increased by 10% to $98,700 compared to $89,800 in 2011.
- The income of **Employees** increased by 11% to $98,020 compared to $88,500 in 2011.
- The income of **Visitors** increased by 9% to $90,580 compared to $83,400 in 2011.
- 26% of **Residents** earned $150,000+ compared to 20% in 2011.
- These figures are significantly greater than the median household income of Los Angeles County residents at $56,300.[2]

Median Household Income (with wage earner)



	Resident	Employee	Visitor	Total
2013	$98,700	$98,020	$90,580	$95,900
2011	$89,800	$88,500	$83,400	$87,400

Education

Education Level Continued Upward, Well Above Average

- **Total Respondents** were highly educated; 76% (75%) had earned an undergraduate or graduate/post-graduate degree. Years of education rose to 17 (16).
- 80% (80%) of **Residents** had earned an undergraduate or graduate/post-graduate degree. Years of education rose to 16.8 (16.1) and nearly 33% (32%) had a graduate degree.
- 76% (73%) of **Employees** had earned an undergraduate or graduate/post-graduate degree and averaged 16.6 years in school, compared to 15.5 in 2011.
- **Visitors** were also highly educated; 71% (69%) had earned an undergraduate or graduate/post-graduate degree. They averaged 16.4 (15.6) years of education.

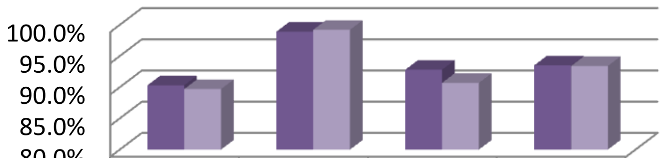
[2] Los Angeles County Census 2010

Employment and Commuting

High Employment Rate

- 94% (93%) of **Total Respondents** were employed (including students full-time, part-time, or self-employed).
- 90% (90%) of **Residents** were employed (including students full-time, part-time, or self-employed).
- 93% (91%) of **Visitors** were employed.

Employment Rate



	Resident	Employee	Visitor	Total
2013	90.3%	98.9%	92.8%	93.5%
2011	89.7%	99.2%	90.7%	93.4%

Business, Finance & Arts Highest Employment Sectors

- 25% (26%) of **Total Respondents** were employed in business, professional, and technical services.
- 20% (20%) of **Residents** were employed in business, professional, and technical services.
- 17% (19%) of **Residents** were employed in arts and entertainment, more than any other demographic segment.
- 25% (26%) of **Employees** were in business, professional and technical services; 15% (15%) worked in financial services and insurance; and 10% (12%) in government.

Employment Position: Over Half in Top Management or Professional

- 53% (52%) of **Total Respondents** held a professional/senior staff or top-level executive position.
- 55% (52%) of **Residents** held a professional/senior staff or top-level executive position.
- 59% (58%) of **Total Respondents** who attended sporting events were in top-level and professional positions, the highest of any demographic segment.

Workplace Mainly Located Downtown

- 71% (72%) of **Total Respondents** worked Downtown.
- The majority of **Residents**, 56% (57%) worked in Downtown LA, 12% (17%) worked on the Westside, 6% (6%) in the San Fernando Valley, and 5% in other areas.
- The overwhelming majority of **LA County Residents**, 81% (82%) worked in Downtown LA.

Employment and Commuting, continued

Most Commuted to Workplace

- 93% (92%) of employed **Total Respondents** commuted to work, 54% (60%) drove alone, and 35% (35%) used public transit including 21% (20%) Metro subway/light rail and 20% (22%) public buses.
- 88% (86%) of employed **Residents** commuted to work. Of those, 51% (56%) drove alone and 36% (37%) used public transit. Thus, even though more were commuting to work, they each used fewer modes.
- Notably, 30% (31%) of employed **Residents** commuted to work by walking while only 15% (15%) of **Total Respondents** walked to work.
- 96% (95%) of **Employees** commuted to work, 51% (56%) drove alone, and 36% (37%) used public transit.

Gender, Age, and Household Composition

Half Caucasian, Few Changes

- Race/ethnicity composition was virtually unchanged compared to 2011.

Gender Skewed Female

- 61% (62%) of the **Total Respondents** were female and 39% (38%) were male. This may be due to who responded as much as the actual incidence.
- The gender breakdown varied by residence, with more parity among **Residents** who were 53% (54%) female versus 47% (46%) male.
- 62% (59%) of **Visitors** were female and 38% (41%) were male.
- 63% (64%) of **Employees** were female and 37% (37%) were male.

Overall Age in Late 30s; Residents in Early 30s

- The overall median age of **Total Respondents** was 37.4, compared to 36.3 in 2011.
- **Downtown Residents** were younger, with a median age of 33.5 (32.5).
- **Visitors** were older, with a median age of 36.4 (34.5).
- **Employees** were also older, with a median age of 39 (38).

Household composition remained relatively the same

- 52% of **Residents** lived in single households, the same percentage as in 2011.

Household Size was Constant at 2+; Residents at 1.8

- Households of **Total Respondents** averaged 2.2 (2.2) people.
- Households of **Residents** averaged the smallest, or 1.8 (1.8) people.
- Households of **Visitors** averaged 2.2 (2.8) people.

Gender, Age, and Household Composition, continued

7 in 10 Residents Rent

- Renting share continued upward and owning dropped for the past three Studies as rental units dominate the residential market.
- 53% (51%) of **Total Respondents** rented an apartment/condo and 40% (41%) owned their residence.
- 71% (68%) of **Residents** rented an apartment/condo and 27% (28%) owned their residence.
- 49% (47%) of **Employees** and 51% (47%) of **Visitors** rented an apartment or condo.

3 Years at Current Residence – Varied by Segment

- **Total Respondents** lived at their current home for 2.8 (2.9) median years.
- **Residents** lived at their current home for 1.8 (1.7) median years.
- **LA County Residents** lived at their current home for 4.8 (5.3) median years, the longest of any segment.

Pets Popular

- 49% (49%) of **Total Respondents** had a pet; 34% (32%) owned a dog, 18% (20%) owned a cat, while 5% (6%) had another type of pet.
- 42% (43%) of **Residents** had a pet; 30% (28%) owned a dog, and 14% (17%) owned a cat.

Home as Office for One-Third of Residents

- 27% (28%) of **Total Respondents** used their home as a primary or secondary office or studio.
- 34% (36%) of **Residents** used their home as a primary or secondary office or studio.

Households Even Between Married & Single for Total Respondents; More Than Half of Residents Single

- 46% (46%) of **Total Respondents** lived in married households; 45% (45%) were single.
- 41% (40%) of **Residents** lived in married households; 52% (52%) were single.

Few Households Had Children Ages 0-5

- 10% (10%) of **Total Respondents** had children under age five living at home.
- 10% of **Total Respondents** planned to start a family in the next few years.
- 6% (6%) of **Residents** had children under age five, the highest of any segment.
- 11% of **Residents** planned to start a family in the next few years.

Few Households with Children Ages 5-18

- 14% (15%) of **Total Respondents** had children ages 5–18 living at home.
- 5% (5%) of **Residents** had children at home in this age group, whereas 16% (17%) of **Employees** did.

Preferred Education for Children

Parents Were Likely to Send Children to Quality Downtown LA Preschool, if Available

- 89% (84%) of **Residents** with children under five years of age were very/somewhat likely to send their children to a quality preschool if one was available in Downtown LA.
- 57% (53%) of **Employees** with children under five years of age were very/somewhat likely to send their children to a quality preschool if one was available in Downtown LA.

Most Preferred School Near Home

- 74% (80%) of **Total Respondents** were likely to send their children to a school near their home, of which 41% (43%) of **Total Respondents** preferred a public school, 20% (26%) preferred a private school, and 12% (9%) named a charter school.
- 9% (11%) of **Total Respondents** were likely to send their children to school near their workplace, of which 4% (6%) preferred a private school, 3% (3%) preferred a public school, and 3% (3%) preferred a charter school.
- Among **Residents**, 58% (63%) were likely to send their children to school near their residence, of which 19% (21%) chose public school, 15% (28%) preferred a private school, and 22% (14%) would select a public charter school.
- For both the **Total Respondents** and **Residents**, public charter schools gained preference since the 2011 Study at the expense of private schools.

Many Lacked Preference for LAUSD DTLA Options

- Of **Total Respondents**, those with children under age five rated their preference for various K-12 school options if they were available in Downtown LA. This was a new question for 2013.
- 29% of **Total Respondents** opted for a high-quality public charter school in Downtown and 20% were open to a quality LAUSD public school, if available. Another 19% preferred a private school.
- 31% of **Total Respondents** were not open to these options.
- 42% of **Residents** preferred a public charter school Downtown, if available.

Retail Types Desired & Most Wanted Brands

The demand for additional amenities remained strong, dropping only slightly due to the opening of new businesses since 2011.

<u>Overall</u>

More Retail & Services Wanted

- 58% (67%) of **Total Respondents**, 64% (72%) of **Residents**, and 64% (73%) of **Visitors** wanted more mid-level restaurants.
- 55% (60%) of **Total Respondents** and 60% (63%) of **Residents** wanted more mid-level department stores (e.g. Nordstrom or Macy's).
- 48% (58%) of **Total Respondents,** 48% (61%) of **Residents**, and 53% (63%) of **Visitors** wanted more book/music/movie stores (e.g. Amoeba).
- Other top mentions among **Total Respondents** included home furnishing stores at 47% (52%), fashion/clothing stores (e.g. Gap or Banana Republic) at 46% (51%), and electronics stores at 45% (57%).

Retail Types Desired & Most Wanted Brands, continued

- As in the 2011 Study, more **Residents** and those who lived & worked in Downtown offered specific name brands they wanted compared to **Total Respondents**.

Nordstrom, Barnes & Noble, Apple Store, and Bed, Bath & Beyond Named

- **Total Respondents** mentioned Nordstrom 38% (37%), Barnes & Noble 23% (25%), Apple Store 23% (28%), and Bed, Bath & Beyond 20% (14%).

<u>Food & Beverage</u>

More Mid-Level Restaurants Wanted

- 58% (67%) of **Total Respondents** wanted more mid-level restaurants, the category with the highest demand.

More Coffee Shops/Cafes Wanted; "Independent" Named

- 44% (50%) of **Total Respondents** wanted coffee shops/cafes.
- 9% of **Total Respondents** wanted independent, non-branded operators.

More Convenience Stores Wanted; 7-Eleven Named

- 28% (28%) of **Total Respondents** wanted more convenience stores.
- 7-Eleven was the most requested with 19% (36%). The drop may be related to additional 7-Elevens opening since the 2011 Study.

More High-End Restaurants Wanted

- 26% (33%) of **Total Respondents** wanted more high-end restaurants.

More Fast-Food Outlets Wanted; In-N-Out Burger Named

22% (26%) of **Total Respondents** wanted more fast-food outlets.

- The top chain requested was In-N-Out Burger with 16% (10%).

<u>Fashion</u>

More Mid-Level Department Stores Wanted; Nordstrom Named

- 55% (60%) of **Total Respondents** wanted mid-level department stores, the second most named category.
- 67% (60%) of **Total Respondents** and 68% (63%) of **Residents** named Nordstrom.

More Discount Clothing Retailers Wanted; H & M Named

- 46% of **Total Respondents** wanted discount fashion retail. This was a new question for 2013.
- H & M was the most specified discount brand with 39%, TJ Maxx with 33%, and Marshall's with 17%.

Demand for General Fashion Stores Increases; Banana Republic Named

- 46% (51%) of **Total Respondents** wanted general fashion stores, the fifth most-named category.
- Banana Republic was the top brand specified by 33% (19%) and 28% (2%) mentioned Zara. Following the collection of the data for the Study, Zara announced they were opening at FIGat7th.

Retail Types Desired & Most Wanted Brands, continued

More High-End Department Stores Wanted; Bloomingdale's Named

- 28% (32%) of **Total Respondents** wanted high-end department stores.
- 52% (48%) of **Total Respondents** named Bloomingdale's 22% (21%).

Goods

More Home Furnishings/Improvement/Hardware Stores Wanted; Bed, Bath & Beyond and Crate & Barrel Named

- 47% of **Total Respondents** wanted home furnishing stores, the fourth highest category.
- The two most cited brands were Bed, Bath & Beyond with 42% (26%) and Crate & Barrel with 30% (19%).

More Book/Music Stores Wanted

- 48% (58%) of **Total Respondents** wanted book/music stores, the third most named category.
- 48% (42%) named Barnes & Noble followed by Amoeba Records with 19% (17%).

More Electronics Retailers Desired; Apple Store Named

- 45% (57%) of **Total Respondents** wanted electronics stores, the sixth most named.
- 50% (48%) of **Total Respondents** cited the Apple Store and 42% (45%) wanted Best Buy.

More Big Box Retail Stores Wanted; Costco Named

- 27% (41%) of **Total Respondents** wanted big box discount stores. This share may have dropped from the 2011 Study due to the opening of CityTarget.
- Most requested Costco, 57% (45%) and Wal-Mart, 33% (25%).

Services

More Personal Services Wanted; Dry Cleaner Named

- 31% (37%) of **Total Respondents** wanted more personal services.
- The main businesses specified were dry cleaners 22% (14%,) shoe repair stores/tailors 14% (9%), and nail salons 10% (6%).
- More named this category and more types were specified than in the 2011 Study.

More Professional Services Wanted; Doctors & Dentists Named

- 25% (31%) of **Total Respondents** wanted more professional services.
- The main businesses specified were doctor 26% (19%), dentist 24% (20%), and optometrist 11% (10%).
- More named this category and more types were specified than in the 2011 Study.

More Veterinary/Animal Services Wanted; Petco Named

- 18% (20%) of **Total Respondents** wanted more veterinary/animal services.
- The top chains requested included Petco with 30% (27%), PetSmart with 15% (11%,) and general "veterinarians" with 15% (11%).

Grocery Shopping

80% Intend to Shop if Trader Joe's Opens Downtown

- 80% (81%) of **Total Respondents** would be extremely or very likely to shop at Trader Joe's if one was located Downtown.
- 90% (92%) of **Residents** would be extremely or very likely to shop there.

60% Intend to Shop if Whole Foods Opens Downtown

- 60% of **Total Respondents** would be extremely or very likely to shop at Whole Foods if one was located Downtown.
- 73% of **Residents** and 72% of those who lived and worked in Downtown would be extremely or very likely to shop there.

Most Travel Two Miles to Buy Groceries

- **Total Respondents** purchased groceries within a median of 1.8 (1.8) miles of their primary residence and 56% (56%) traveled up to two miles for groceries.
- **Residents** traveled a median of 2.1 (2.0) miles and 29% (28%) traveled more than five miles.
- In contrast, **LA County Residents** traveled a median of 1.75 (1.7) miles and 60% (60%) traveled less than two miles.

Specialty and Chains Remain Most Popular for Groceries; Preference for Big Box Stores and Farmers' Markets Increase

- 76% (75%) of **Total Respondents** and 75% (73%) of **Residents** shopped for groceries in specialty grocers (such as Trader Joe's or Whole Foods Market.)
- 71% (73%) of **Total Respondents** and 70% (71%) of **Residents** shopped for groceries at chain supermarkets.
- 37% (35%) of **Total Respondents** and 39% (36%) of **Residents** shopped for groceries at farmers' markets.

When asked about specific brands:

- 70% (76%) of **Total Respondents** and 67% (74%) of **Residents** shopped for groceries at Trader Joe's.
- 62% (68%) of **Total Respondents** and 73% (76%) of **Residents** shopped for groceries at Ralphs.
- 33% of **Total Respondents** shopped at Target regularly. Target was added to the list in 2013 due to the opening of the CityTarget at FIGat7th.

Grocery Shopping, continued

Among Residents, grocery shopping routines changed only slightly. Ralphs and Trader Joe's remain the top two choices.

- Ralphs remained the top grocery chain at 73% (76%) with Trader Joe's second at 68% (74%), and Whole Foods third at 42% (45%).
- Farmers' markets retained the fourth position at 39% (36%).
- Target, at 32%, was added to the 2013 Study in consideration of Downtown's new CityTarget.

Grocery Spending Flat & Comparable Among Segments

- **Total Respondents** spent $105 ($105) weekly on groceries per household.
- **Residents** spent $103 ($102) per household.
- **Employees** spent $107 ($109) per household.
- **Students** spent the least, $92 ($91) per household.
- Those who attended Downtown sporting events spent comparably higher at $108 ($107).

Dining Out

More Ate Lunch Out

- 90% (87%) of **Total Respondents** ate lunch at a Downtown restaurant at least once per month.
- 91% (89%) of **Residents** ate lunch at a Downtown restaurant at least once per month.
- 88% (87%) of **LA County Residents** ate lunch at a Downtown restaurant at least once per month.
- 95% (94%) of **Employees** ate lunch at a Downtown restaurant at least once per month.
- People ate out most often in casual, less expensive restaurants and least often in the highest priced restaurants.

Lunch Checks Increase

- When eating lunch at a Downtown restaurant, **Total Respondents** spent a median of $15.22 ($14.62) per meal (including tax/tip).
- **Residents** spent $16.42 ($15.56).

More Ate Dinner Out

- 71% (68%) of **Total Respondents** ate dinner at a Downtown restaurant at least once per month.
- 93% (92%) of **Residents** ate dinner at a Downtown restaurant at least once per month.
- 54% (52%) of **LA County Residents** ate dinner at a Downtown restaurant at least once per month.
- 94% (93%) who lived & worked in Downtown ate dinner at a Downtown restaurant at least once per month.

Dinner Checks Increase

- **Total Respondents** spent $30.45 ($28.84) per meal (including tax/tip).
- When eating dinner at a Downtown restaurant, **Residents** spent $1.78 more in 2013 than in 2011 or $30.45 ($28.28) per meal (including tax/tip).

Activities and Events Attended

Total Respondents indicated how frequently they attended Downtown activities. As expected, more **Residents** and those who lived & worked in Downtown engaged in activities and attended each event type more compared to **Total Respondents**. **Residents** participated in dining/nightlife 21 times and shopping 12 times annually, the two most frequent activities.

Total Respondents Were Active, Culture-Seekers

- 46% (47%) of museum-goers also attended live sports events Downtown.
- 85% (83%) of sports patrons also visited museums/cultural arts/live performances.
- Nearly 5 in 10 cultural arts patrons also were sports patrons.
- More than 8 in 10 sports patrons also were cultural arts patrons.
- Most frequently dined out/participated in nightlife, a median of 8 times per year.
- They shopped (non-groceries) 6 times a year and attended 3 special events annually.
- Fewer **Employees** indicated attending events compared to **Total Respondents**.

Total Respondents per Activities/Events

Activities

- 89% Retail or Wholesale Shopping (new question for 2011)
- 87% Dining out/nightlife (new question)

Events

- 82% (83%) Live music/theater/dance
- 82% (82%) Special events
- 80% (80%) Art museums/galleries
- 66% (67%) Live professional sports

90% Dined Out Before/After an Event

- 90% (92%) of **Total Respondents** dined before or after a live cultural, arts, sports, or special event at least some of the time or more often.
- 93% (94%) of **Residents** dined before or after a live cultural, arts, sports, or special event at least some of the time or more often.
- Overall, dining out frequency with an event of **Total Respondents** is rated 3.99 (on a 5 point scale); 4.10 for **Residents**, 4.14 for those who lived & worked Downtown, and 4.22 for sports fans.

Few Stayed in Hotels When Attending an Event

This was a new question for 2013.

- The vast majority of **Total Respondents** did not stay in a hotel while attending an event here; 12% did almost always, fairly often, or sometimes.
- 20% of **Visitors** stayed in a hotel at least sometimes or more often.

Activities and Events Attended, continued

Information Sources

- 65% of **Total Respondents** typically learned about events and activities in Downtown through word-of-mouth, a notable rise from 54% in 2011. This signals the importance of human interaction over and/or in addition to media.
- 47% of **Total Respondents** relied on social media sites (Facebook, Twitter etc.; this was a new question in 2013).
- 38% (33%) of **Total Respondents** named DowntownLA.com, the DCBID's website.
- 37% (29%) of **Total Respondents** named *LA Weekly* (print or website).
- 36% (41%) of **Total Respondents** named *Los Angeles Times* (print or website).
- 36% of **Total Respondents** and 44% of **Residents** named the *Los Angeles Downtown News* (print or website).
- 67% of **Residents** and 65% of **Employees** relied on word-of-mouth.

Additional Information

If you have questions about the Study, or would like more information about opening a business or investing in Downtown LA, please visit our website DowntownLA.com or contact the DCBID's Economic Development Department at jkreger@downtownla.com.

Appendix

Detailed charts are located in the Downtown LA Demographic Study 2013 **Appendix**, available on our website, DowntownLA.com/Survey.