A PEDESTRIAN SURVEY

conducted in

THE PLAYHOUSE DISTRICT

May, 2013

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Appendix A — Questionnaire

The following are highlights from the 2013 Playhouse Pedestrian Survey, conducted May 16-19, 2013.

What is the geographic distribution of visitors to the Playhouse District?

- The Playhouse District draws more local residents who live in the City of Pasadena than in the past, increasing from 45% in 2008 to 64% currently. This is a positive for the District, since it shows the growth in the local residential base.

- 5% of the pedestrians surveyed in the Playhouse district are out-of-town visitors, slightly higher than the 2% recorded in the 2008 survey. Most out-of-town visitors stay with friends or family or somewhere other than a hotel. Two visitors each stayed at the Pasadena Hilton, the Courtyard by Marriott and the Sheraton.

- If the Playhouse District wished to target selected better-income zip codes within its trade area for increased patronage, these would include the Pasadena zip codes of 91105, 91107 and 91030, Altadena (91001), Sierra Madre (91024), La Crescenta (91214), San Marino (91108), La Canada Flint (91011) and Arcadia (91006)

How do pedestrians refer to the District, and how did they learn about it initially?

- In a new question asked this year, only 24% of pedestrians correctly identified the area in which they were surveyed as "Playhouse District', with many calling it just a part of the City of Pasadena (36%) or combining it with Old Pasadena (14%). The ongoing branding of the Playhouse District will be monitored in future surveys.

- Since a large percentage of Playhouse pedestrians live in Pasadena or close by, it is not surprising that most learned about this district just by living there (65%). A few had learned via word of mouth (23%), but paid media is not much of a factor (only 3%, including the Internet).

What are the demographic characteristics of Playhouse District pedestrians, and how do they vary from the 2008 demographic profile?

- Pedestrians surveyed in the Playhouse District are middle-aged, extremely well-educated professionals whose household incomes average more than $80,000. This demographic profile is almost identical to that found in the District in 2008.

- Only 22% of Playhouse pedestrians have children at home, a similarly low percentage to what has been found in past surveys and less than the national average. Traffic in the Playhouse District is nearly evenly balanced between men (52%) and women (48%).

What is the competitive positioning of the Playhouse district?

- Since so many of the pedestrians surveyed are local residents, it is natural that they cross-shop most often in nearby Old Pasadena (62%), Paseo Colorado (50%) and South Lake (48%). Only a small part of that is on the same day they were surveyed, although the same-day shopping/dining in Old Pasadena increased significantly in this year's survey.

- By contrast, only 21% had shopped at either Glendale Galleria or Westfield Santa Anita in the past month, and all of the other shopping destinations which were listed and shown to pedestrians were cross-shopped even less than that. The reasons given for shopping at any particular location were overwhelmingly convenience (79%) and store selection (41%).

- Playhouse District's strongest attributes are its convenient location and pleasant atmosphere, which were also the top attributes in 2008. There was a significant increase in the ratings of the Playhouse District's safety and cleanliness, which a majority of 58% now call superior to the safety and cleanliness of other retail locations. This follows an increase in the perceptions of the District's safety and cleanliness between the 2003 and 2008 surveys, indicating a steady trend upwards.

- The two lowest ratings given to Playhouse in this year's survey are its selection of tenants and parking, which were also the lowest ratings given in 2008. Pedestrian's ratings of the District's parking did improve between 2003 and 2008, but did not make a statistical increase this year.

What patterns do pedestrians in the Playhouse district show in their behaviors?

- Pedestrians surveyed in the Playhouse District came to the area with multiple purposes in mind; in addition to living in the area they intend to dine (38%) and to shop (30%). Going to the theater or movies was a smaller response in this year's survey (21%, compared to 57% in 2008), because this year's surveys were conducted in a week in which no performances were being held at the Playhouse.

- Spending in the District increased significantly in this year's survey, particularly for food and drink. Not only did more pedestrians stop to eat and drink something (rising from 52% in 2008 to 71% currently), but the average expenditure on food and drink more than doubled, from $14.30 previously to $30.90 currently. The new restaurants which have been added contributed to this, with Tender Greens, Blaze and Settebello all being patronized by significant segments of pedestrians.

- Spending on retail goods also increased, from an average of $18.70 in 2008 to $28.40 currently (across all pedestrians surveyed, not just those spending something). Spending on entertainment stayed the same as it had been in 2003 (an average of $3 across all pedestrians surveyed), but that was related to the fact that no performances were held at the Playhouse during the survey week.

- Because of the increased numbers of local residents, pedestrians visit the Playhouse District an average of about once every four days. Even when local residents are taken out of that calculation, the average frequency is an impressive 4 trips a month. They spend more than an hour and a half per trip.

- In the past, Vroman's was the leading tenant entered in the Playhouse District, but that store has now been eclipsed by Target (22% compared to just 10% for Vroman's), a casualty of the national troubles being experienced by booksellers. This is also related to the frequent visits being made to the District by those surveys, a frequency which would more likely apply to shopping at Target than at Vroman's.

- Only 41% of the pedestrians surveyed in the Playhouse District this year had come there by car, down from 63% previously. Most park on the street, and the price they would pay for an hour of parking averages just $.62, a drop from the $.80 response in 2008. The percentage who walked or biked to the Playhouse has risen to an impressive 35%, up from 26% previously.

<u>**What additional stores are desired in the Playhouse district?**</u>

- Pedestrians surveyed in the Playhouse District made an average of three different suggestions for the tenants they would like to see added here, which is comparable to the 2008 survey. Their leading requests were for more sit-down restaurants and entertainment venues, even though those are the uses that already dominate their spending. Upper-income pedestrians are the most interested in seeing new restaurants added, so the addition of Urth Caffe to the Playhouse District later this summer should be a welcome addition.

- Other merchandise categories which were requested by more than 20% of Playhouse pedestrians include: a coffeehouse, women's apparel, gifts/books and men's apparel.

Surveys were conducted with pedestrians at key locations in the Playhouse District in 1999, 2003 and 2008 and the district wished to update that information in 2013. **The overall objective of this study is to provide a more informed basis for leasing and district management of the Playhouse district.**

A total of 213 surveys were conducted with pedestrians in the Playhouse district from May 16 through May 19, 2013. The locations where surveys were conducted are shown below, both for 2013 and 2008.

LOCATION	2013	2008
Colorado between Lake & Mentor	22%	NA
Colorado & Madison	19%	NA
Mentor near the Ice House	16%	NA
Green & El Molino N/W	15%	12%
Oak Knoll & Colorado	12%	30%
El Molino between Colorado & Alley	10%	NA
Colorado & El Molino N/E	7%	28%
Oakland & Colorado	NA	12%
Arcade Lane	NA	12%

2013 Playhouse Pedestrian Survey

Residents under 16 years of age and those who are employed by a retail store located in the Playhouse district were not surveyed. In all other respects, the interviewing was conducted in a random fashion, so as to reflect the actual composition of pedestrians. The questions asked in this survey were similar to those which were asked in previous pedestrian surveys conducted for the Playhouse district; a copy of the final questionnaire has been included as an appendix to this report. The total sample of 213 interviews yields a margin of error of plus or minus 8%. Throughout the analysis of findings, caution was taken with sub-samples that fall below a statistically significant level.

Interviews were conducted by the House of Marketing, based in Pasadena, California. Marketing Research Technologies of Indianapolis, Indiana was responsible for all data processing. Gentleman McCarty was responsible for the preparation of this summary of findings.

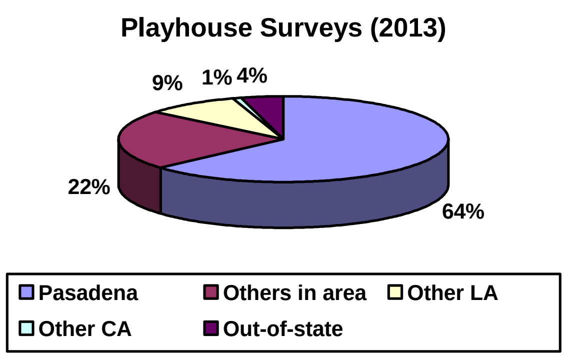
In this year's survey the Playhouse District serves a more compact trade area which is more concentrated on the City of Pasadena than in the past, with 64% of those surveyed saying they were Pasadena residents (up from 45% in 2008). The trade area now extends from Monrovia on the east to Glendale on the west, and does not extend as far into Los Angeles to the south.

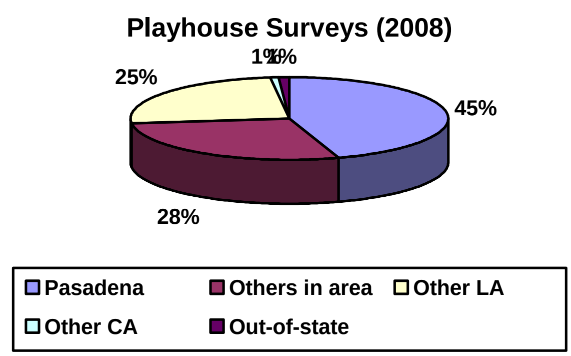
Exhibit A shows the trade area for the City of Pasadena.

- The blue segments of the two pie charts below show the significant increase in local traffic that has occurred in the Playhouse District in the past five years, from 45% previously to 64% in this year's survey. This is a positive for the District, since these local residents have increased their spending.

- There was a very slight increase in the percentage of tourist traffic from outside of the Los Angeles metropolitan area, from 2% previously to 5% in this year's survey. It should be noted that the surveys were conducted in a week in which the Playhouse did not have any performances, which it is assumed would further increase tourist traffic.

- The corresponding decrease which occurred in this year's survey was the percentage of Playhouse traffic coming from Los Angeles, which declined significantly from 25% in 2008 to just 9% currently.





- The zip codes which continue to be penetrated best by the Playhouse District are the Pasadena zip codes of 91101 (in which it is located) and 91106. The other zip codes which are well-penetrated are all Pasadena addresses.

- In addition to not drawing as many Los Angeles residents, the Playhouse District's trade area does not extend as far east as it did in 2008, when the communities of Azusa, Duarte and Baldwin Park were represented among Playhouse pedestrians.

- If the Playhouse District or any of its retailers wished to target selected zip codes in this trade area for increased penetration, those where incomes are above-average which should be paid particular attention include: the Pasadena zip codes of 91105, 91107 and 91030, Altadena (91001), Sierra Madre (91024), La Crescenta (91214), San Marino (91108), La Canada Flint (91011) and Arcadia (91006).

The zip codes which form the Playhouse District's trade area are shown below.

ZIP	PLACE NAME	NUMBER OF SHOPPERS	PERCENT OF SHOPPERS	2008 PERCENT	NO. OF HHOLDS (1	HHLD INCOME (000)	PENETRATION INDEX (2
91101	Pasadena	61	30%	14%	10,665	$63.2	1,064
91106	Pasadena	25	12%	9%	10,459	$85.9	445
91104	Pasadena	14	7%	7%	13,157	$78.2	198
91107	Pasadena	13	6%	5%	13,220	$98.8	183
91030	South Pasadena	12	6%	4%	10,516	$96.0	212
91103	Pasadena	8	4%	5%	8,860	$74.8	168
91001	Altadena	5	2%	3%	12,830	$97.8	72
91105	Pasadena	4	2%	4%	5,491	$130.1	135
91024	Sierra Madre	2	1%	1%	4,949	$113.6	75
91801	Alhambra	2	1%	1%	19,387	$61.3	19
91016	Monrovia	2	1%	1%	15,018	$71.0	25
90039	Los Angeles	2	1%	<1%	11,150	$75.0	33
91214	La Crescenta	2	1%	0%	10,648	$100.7	35
91203	Glendale	2	1%	0%	5,452	$53.6	68
90041	Los Angeles	1	<1%	4%	9,933	$74.7	19
90065	Los Angeles	1	<1%	1%	14,525	$64.7	13
90042	Los Angeles	1	<1%	1%	19,798	$57.2	9
91108	San Marino	1	<1%	<1%	4,349	$170.7	43
91011	La Canada Flint	1	<1%	<1%	6,848	$159.0	27
91775	San Gabriel	1	<1%	<1%	8,422	$85.9	22
91006	Arcadia	1	<1%	<1%	10,844	$93.8	17
91204	Glendale	1	<1%	<1%	5,387	$47.6	34
91007	Arcadia	0	0%	2%	12,075	$86.5	0
90026	Los Angeles	0	0%	1%	26,212	$50.5	0
91206	Glendale	0	0%	<1%	13,533	$75.2	0
91205	Glendale	0	0%	0%	14,162	$47.2	0
91020	Montrose	0	0%	0%	3,414	$75.9	0
		162	**80%**	**68%**	**301,304**	**$78.1**	**100**

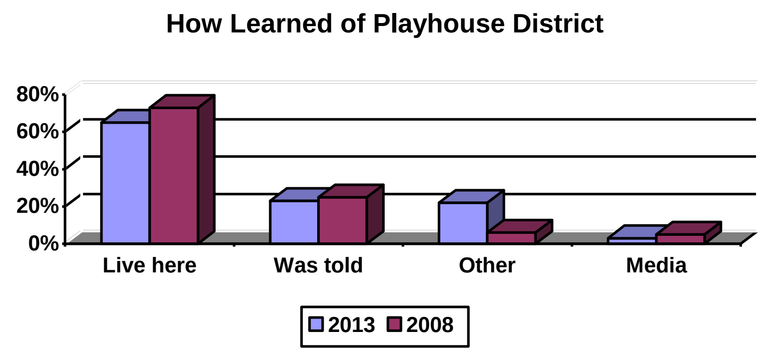
2013 Playhouse District Pedestrian Survey

1) Estimates provided by ESRI.

2) Penetration index is calculated by dividing the number of shoppers from a zip code into the total number of households living in that zip code, and then restating on a basis of 100 being an average level of penetration.

A new question was asked in this year's survey, to determine how pedestrians refer to the District. Only 24% correctly identified it as "Playhouse District", with many identifying it as just a part of the City of Pasadena (36%) or combining it with Old Pasadena (14%). The branding of the Playhouse District will be monitored in future surveys.

Since a large percentage of Playhouse pedestrians live in Pasadena or close by, it is not surprising that most learned about this district just by living there (65%). Only 3% had learned about the area from various media, including the Internet. This percentage is consistent with past surveys.



- The 5% of Playhouse pedestrians who live outside of the Los Angeles metropolitan area is slightly greater than the 2% recorded in the 2008 survey. It is possible that this tourist segment is even greater in the weeks in which the performances are scheduled at the Playhouse, which was not the case during this survey period.

- The pedestrians who live outside of the area were asked where they were staying. Only 5 out of these 11 pedestrians were staying in a hotel, as opposed to staying with friends or family or somewhere else. There were 6 hotels mentioned in this year's survey.

OUT-OF-TOWN VISITORS:	PERCENT
WHERE STAYING:	
Staying with friends/family	44%
Staying somewhere else	28%
Staying in a hotel	28%
HOTELS STAYING AT:	
Pasadena Hilton	20%
Courtyard by Marriott	20%
Sheraton	20%
Other hotel (1	40%

1) Other mentions include: Ontario airport hotel, Quality Inn, Saga Motel
2013 Playhouse Pedestrian Survey

Pedestrians surveyed in the Playhouse district are middle-aged, very well-educated professionals whose household incomes average more than $80,000. This demographic profile is almost identical to the 2008 survey findings.

Age

- The average age of pedestrians surveyed in the Playhouse District was 40.6 years, which is a few years younger than the ages of all adult trade area residents. Almost half of pedestrians are concentrated between 25 and 44 years of age.

Household Composition

- Only 22% of all Playhouse pedestrians have children at home, a low percentage which was also true in the 2008 survey.

Education, Occupation & Income

- 63% of Playhouse District pedestrians have completed a four-year college degree, a high level of educational attainment. More than one-third of these pedestrians are employed in a professional/technical occupation, making that by far the top occupational category.

- As noted earlier, the average household income of all pedestrians surveyed this year in the Playhouse District is now $80,800, which is slightly higher than the household incomes of all trade area households. Between the 2003 and 2008 surveys the incomes of pedestrians surveyed in the Playhouse District jumped significantly, from $63,000 to nearly $80,000, a trend which continues today.

Gender

- Men continue to be a slight majority of the persons surveyed in the Playhouse District (52%). Men spend equally to women on food and drink, but spend almost nothing in the District on retail merchandise.

The demographic characteristics of Playhouse District pedestrians are shown on the following page, in comparison to all area residents.

DEMOGRAPHIC TRAIT:	2013 PLAYHOUSE PEDESTRIANS	2008 PLAYHOUSE PEDESTRIANS	ALL AREA RESIDENTS	PENETRATION (1
AGE:				
16-17	1%	2%	3%	33
18-24	16%	11%	11%	145
25-34	25%	20%	18%	139
35-44	22%	26%	18%	122
45-54	16%	19%	18%	89
55-64	11%	10%	15%	73
65+ years	10%	10%	17%	59
Average Age	**40.6**	**42.1**	**45.6**	**89**
HOUSEHOLD COMP:				
Children in household	22%	18%	NA	NA
No children	78%	82%	NA	NA
EDUCATION:				
High school	13%	10%	NA	NA
Some college	23%	20%	NA	NA
Completed college	36%	42%	NA	NA
Graduate school	27%	28%	NA	NA
OCCUPATION:				
Professional/technical	37%	47%	NA	NA
Administrative/supervisor	7%	7%	NA	NA
Clerical/secretary	5%	4%	NA	NA
Retail/sales	7%	4%	NA	NA
Service	6%	5%	NA	NA
Other sales	1%	3%	NA	NA
Skilled worker	3%	6%	NA	NA
Laborer	1%	2%	NA	NA
Student	13%	8%	NA	NA
Homemaker	5%	3%	NA	NA
Other	14%	9%	NA	NA
HOUSEHOLD INCOME:				
Under $25,000	18%	13%	22%	82
$25,999 - $49,999	19%	25%	24%	79
$50,000 - $74,999	22%	20%	17%	129
$75,000 - $99,999	16%	18%	11%	145
$100,000 - $149,999	12%	13%	14%	86
$150,000 or more	12%	11%	12%	100
Average Income ($000)	**$80.8**	**$79.1**	**$78.1**	**103**
GENDER:				
Female	48%	44%	51%	94
Male	52%	56%	49%	106

2013 Playhouse District Pedestrian Survey

Pedestrians surveyed in the Playhouse District were asked about the other areas they had patronized in the prior month, and Old Pasadena (62%), Paseo Colorado (50%) and South Lake (48%) are all top destinations. Some of that cross-shopping occurred on the same day they were surveyed in the Playhouse District, which will be discussed later in this section.

- One reason for the dominance of these other districts is that so many of the pedestrians surveyed live right in Pasadena. Among residents who live well outside of the area, Old Pasadena was still the most cross-shopped area, but Glendale Galleria was cross-shopped just as much as Paseo Colorado and South Lake.
- Glendale Galleria and Santa Anita were the next most-shopped centers, each cross-shopped by 21% of the Playhouse District pedestrians surveyed. The dominant reason given for shopping at a particular center was its convenient location (79%), so Glendale's shoppers are probably those living to the west and Santa Anita's those living to the east.
- Less cross-shopping occurs at Americana at Brand (16%), Old Town Monrovia (15%), Downtown Alhambra (15%) and Downtown Montrose (14%).
- The second reason given for shopping in a particular area was the merchandise mix there (41%).

	2013	BY INCOME (000):			BY RESIDENCE	
	SHOPPERS	<$50	$50-100	$100+	TRADE AREA	OUTSIDE
PAST MONTH PATRONAGE:						
Old Pasadena	62%	66%	57%	62%	68%	40%
Paseo Colorado	50%	52%	47%	57%	58%	23%
South Lake	48%	48%	48%	45%	55%	23%
Other areas of Pasadena	23%	23%	26%	17%	26%	15%
Glendale Galleria	21%	26%	14%	21%	20%	23%
Westfield Santa Anita	21%	20%	16%	25%	23%	15%
Americana at Brand	16%	22%	10%	15%	18%	10%
Old Town Monrovia	15%	16%	14%	15%	18%	4%
Downtown Alhambra	14%	15%	12%	11%	13%	15%
Downtown Montrose	4%	5%	1%	6%	5%	2%
Other area	20%	20%	19%	21%	19%	23%
Didn't shop any of those areas	14%	8%	18%	19%	8%	31%
REASON FOR PATRONAGE:						
Close to home/convenient	79%	75%	90%	76%	83%	58%
Like the stores	41%	33%	50%	42%	37%	58%
More pleasant atmosphere	16%	19%	10%	21%	13%	30%
Better prices	9%	10%	2%	8%	8%	12%
Safe	3%	7%	2%	0%	3%	3%
Other reasons	15%	19%	12%	16%	11%	30%

2013 Playhouse District Pedestrian Survey

% Indicates data which is statistically greater than the value in the corresponding column.

Playhouse District pedestrians were asked to rate the district on six key attributes, in comparison to other places at which they shop. The district's strongest attributes are its convenient location and pleasant atmosphere, which were also the top-rated attributes in the 2008 survey.

- The ratings of Playhouse District's safety and cleanliness have improved since 2008. A majority of 58% now say that Playhouse does a better job than other shopping areas, in these important attributes, up from 44-48% previously. This follows a previous increase in those ratings betw4een 2003 and 2008, indicating a steady trend upwards.

- The two lowest ratings given to Playhouse in this year's survey are its selection of tenants and parking, which were also the lowest ratings given in 2008. Pedestrian's ratings of the District's parking improved between 2003 and 2008, but did not make a statistical increase this year.

	COMPARED TO OTHERS SHOPPED:			2013	2008	2003
ATTRIBUTE:	BETTER	SAME	WORSE	SCORE (1	SCORE (1	SCORE (1
Convenience	65%	26%	7%	2.6	2.5	2.4
Atmosphere	58%	34%	6%	2.5	2.5	2.3
Safety	58%	39%	1%	2.6	2.4	2.3
Cleanliness	58%	37%	3%	2.6	2.4	2.3
Selection of tenants	34%	49%	14%	2.2	2.1	2.1
Parking	25%	36%	24%	2.0	2.1	1.9

2013 Playhouse District Pedestrian Survey
1) Score calculated on a three-point scale where "3" is "Playhouse better" and "1" is "Playhouse worse", compared to other places shopped.

Pedestrians in the Playhouse District were asked about their same-day cross-patronage of the other 4 districts in Pasadena and it was found again in this year's survey that this is minimal.

- The two most cross-shopped districts by Playhouse pedestrians are Old Pasadena (20%) and Paseo Colorado (18%). The cross-shopping that is done in Old Pasadena increased in this year's survey, and the amount that is spent there almost tripled, to an average of $5.29 across all pedestrians surveyed.

- Only 11% had cross-shopped South Lake Avenue and a smaller proportion of 1% at Hastings Ranch. This is understandable, given the distance between the Playhouse District and Hastings Ranch.

CROSS-SHOPPING:	2013 PEDESTRIANS	PEDESTRIANS BY INCOME (000): <$50	$50-100	$100+	2008 PEDESTRIANS
OLD PASADENA:					
Also visited there	20%	29%	17%	13%	13%
Spent something there	9%	16%	7%	4%	4%
$ spent (all)	$5.29	$10.49	$2.40	$4.50	$1.79
$ spent (purchasers)	$59.00	$63.25	$35.20	$105.00	$39.78
PASEO COLORADO:					
Also visited there	18%	19%	15%	15%	13%
Spent something there	8%	7%	10%	13%	5%
$ spent (all)	$1.20	$0.50	$1.00	$3.30	$1.85
$ spent (purchasers)	$15.00	$7.60	$10.30	$25.80	$37.00
SOUTH LAKE AVE.:					
Also visited there	11%	8%	8%	21%	6%
Spent something there	6%	7%	2%	13%	2%
$ spent (all)	$3.00	$1.10	$0.20	$11.30	$0.75
$ spent (purchasers)	$49.00	$15.80	$15.00	$88.30	$30.00
HASTINGS RANCH:					
Also visited there	1%	3%	0%	2%	3%
Spent something there	<1%	1%	0%	2%	1%
$ spent (all)	$0.07	$0.15	$0.00	$0.40	$0.04
$ spent (purchasers)	$15.00	$10.00	$0.00	$20.00	$5.00

2013 Playhouse District Pedestrian Survey

Pedestrians surveyed in the Playhouse District come to the area with multiple purposes in mind, averaging 1.8 responses to the question about the purpose of their visit. Aside from living in the area, the primary two purposes in this year's survey were dining and shopping, as was the case in 2008. Going to the movies and live theater entertainment was less of a response in this year's survey (21% compared to 57% in 2008), because the surveys were conducted when no performances were being held at the Playhouse.

- A segment of 10% had come to the District for work (although not in a retail establishment). Most of these workplaces were on Colorado or Lake.

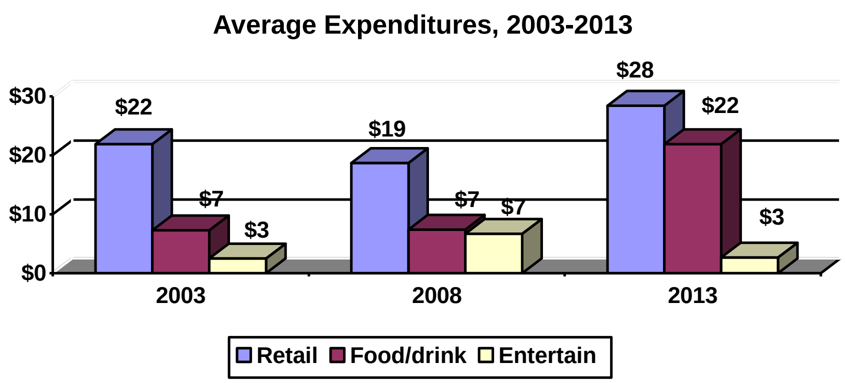
- As noted earlier, the percentage of Pasadena pedestrians who came from out of town increased slightly in this year's survey, from 2% in 2008 to 7% currently.

PURPOSE OF VISIT:	2013 PEDESTRIANS	2008 PEDESTRIANS	2013 PEDESTRIANS BY INCOME (000): <$50	$50-100	$100+
Live in Pasadena area	52%	50%	47%	67%	36%
Came here to dine	38%	68%	36%	38%	51%
Came here to shop	30%	74%	36%	26%	28%
Came for movies/entertainment	21%	57%	22%	12%	28%
Came for other reasons	20%	21%	23%	20%	15%
Came primarily for work	10%	7%	7%	15%	8%
Out-of-town business	4%	2%	3%	4%	6%
Out-of-town vacation	3%	<1%	4%	1%	4%
Museum or performance	3%	22%	18%	26%	17%
AVERAGE USES:	**1.8**	**3.0**	**2.0**	**2.1**	**1.9**

2013 Playhouse District Pedestrian Survey

% Indicates data which is statistically greater than the value in the corresponding column.

There were several increases in the expenditures made in Pasadena in this year's survey. As noted earlier, the increase in food and drink expenditures was the most dramatic, both in terms of more pedestrians spending something (from 52% in 2008 to 71% currently) and in their average transactions (rising from $14.30 in 2008 to $30.90 currently). There was also a 52% increase in the amount spent on retail goods, from $18.70 in 2008 to $28.40 currently. These increases are shown graphically below.



- The increase in entertainment expenditures which was seen in the 2008 survey (from $3 previously to $7) has gone back down to $3 in this year's survey. As noted earlier, this may have been due to the decision to conduct the surveys during a week in which there were no performances at the Playhouse.

- The customers who spent the most in the Playhouse District follow a similar pattern to that seen in most shopper surveys: they are older (35+ years of age), more affluent, female and have children at home.

- An average of 87 visits was reported as being made to the Playhouse District in the past year, which is about once every four days. This was boosted by the 9% who said they were in the District nearly every single day. This very frequent patronage is because so many residents of the City of Pasadena were surveyed in this district; when those residents are taken out of the calculation the frequency of visits drops to 49 in the past year, or 4 trips a month, which is still impressive.

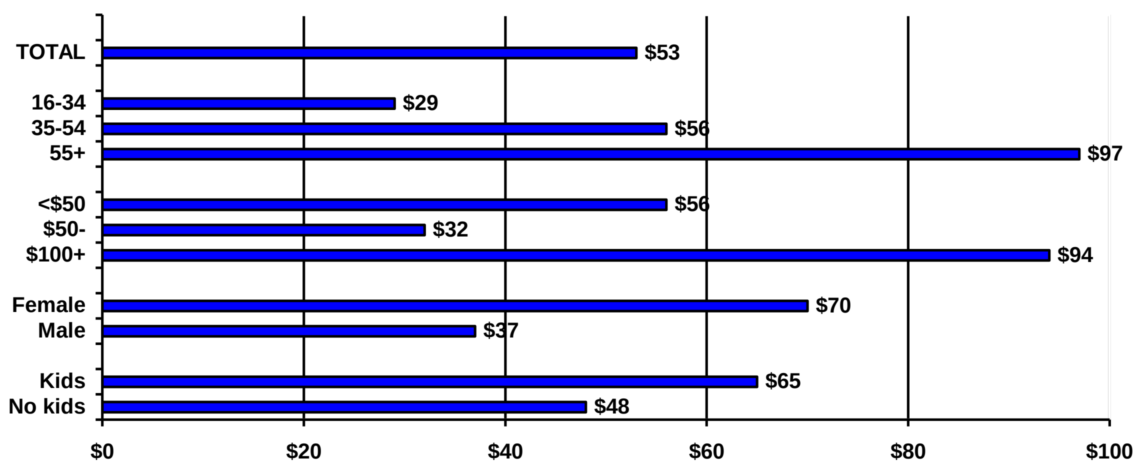
- Pedestrians spent more than an hour and a half (94 minutes) in the Playhouse District, which is a few minutes more than they spent in 2008 (84 minutes).

The detailed data on expenditures, frequency of visits and length of stay are shown on the following page.

CROSS-SHOPPING:	2013 PEDESTRIANS	PEDESTRIANS BY INCOME (000) <$50	$50-100	$100+	2008 PEDESTRIANS
Spending on food/drink:					
Spent $1+	71%	69%	69%	81%	52%
Didn't spend anything	29%	31%	31%	19%	48%
Avg. spent (all)	$21.90	$13.20	$18.42	$43.77	$7.40
Avg. spent (purchasers)	$30.90	$19.30	$26.90	$54.10	$14.30
Spending on retail:					
Spent $1+	30%	29%	32%	32%	39%
Didn't spend anything	70%	71%	68%	68%	61%
Avg. spent (all)	$28.40	$41.50	$11.50	$44.87	$18.70
Avg. spent (purchasers)	$94.10	$144.30	$39.50	$140.59	$48.50
Spending on entertainment:					
Spent $1+	19%	21%	14%	23%	18%
Didn't spend anything	81%	79%	86%	77%	82%
Avg. spent (all)	$2.68	$1.58	$2.44	$4.94	$6.70
Avg. spent (purchasers)	$13.85	$7.70	$17.57	$21.11	$37.00
TOTAL SPENT (all)	**$32.80**	**$28.30**	**$34.20**	**$41.50**	**$32.80**
Frequency of visits (past year)	87	85	106	57	96
# of minutes spent:	94	90	91	107	84

2013 Playhouse District Pedestrian Survey
% Indicates data which is statistically greater than the value in the corresponding column.

Expenditures by Customer Segment



An average of 1.6 tenants were entered by pedestrians surveyed in the Playhouse District, led by food and drink purveyors. A similar number of stores were entered in the 2008 surveys, but then the list was led by specialty stores, which was because of the dominance of Vroman's. The largest and oldest independent book store in California was mentioned by only 10% in this year's survey, down from 38% in 2008, reflecting the nationwide troubles being experienced by bookstores.

- Many of the top-mentioned food and drink purveyors are the new tenants which have been added to the Playhouse District since the 2008 survey was conducted, including Tender Greens, Blaze and Settebello.

- Target was the single tenant that was most-mentioned in this year's survey, by 22%.

STORES ENTERED:	2013 PEDESTRIANS	PEDESTRIANS BY INCOME (000): <$50	$50-100	$100+	2008 PEDESTRIANS
# of stores entered:	1.6	1.5	1.6	1.8	1.7
FOOD	**64%**	**54%**	**66%**	**84%**	**46%**
Tender Greens	6%	1%	4%	16%	NA
Subway	5%	6%	6%	2%	2%
Coffee shop	5%	4%	6%	0%	2%
Starbucks	4%	4%	7%	2%	3%
Blaze	3%	3%	3%	4%	NA
Zona Rosa Café	3%	3%	4%	4%	1%
Lovebird's Bakery	3%	4%	3%	4%	1%
Settebello	3%	0%	6%	4%	NA
El Metate	3%	2%	0%	4%	1%
SPECIALTY	**25%**	**17%**	**26%**	**41%**	**48%**
Vroman's	10%	4%	9%	23%	38%
DEPARTMENT	**23%**	**28%**	**26%**	**14%**	**17%**
Target	22%	26%	26%	14%	17%
ENTERTAINMENT	**17%**	**21%**	**17%**	**18%**	**22%**
Movies	5%	8%	1%	7%	17%
$3 Theater	4%	7%	0%	0%	4%
Laemmle Theater	4%	1%	3%	9%	2%
SERVICES	**13%**	**18%**	**10%**	**7%**	**12%**
GROCERY/DRUG	**8%**	**8%**	**6%**	**9%**	**10%**
APPAREL/ACCESS.	**7%**	**7%**	**10%**	**4%**	**3%**

2013 Playhouse District Pedestrian Survey

% Indicates data which is statistically greater than the value in the corresponding column.

Only 41% of the Playhouse pedestrians who were surveyed this year had come to the District by car, which is down from the majority of 63% who drove or were a passenger in a car in 2008. The percentage who walked or biked to the Playhouse District was the highest it has ever been, at 35%, which is probably related to the fact that so many lived nearby.

- It continues to be easy to find a parking space in the Playhouse District, with only 3 minutes required to secure one.
- Only 19% had paid to park in the Playhouse District, a percentage which has historically been low. That causes most to have the expectation that parking there will be free or very inexpensive. A "reasonable price" for an hour of parking was therefore an average of just 62 cents, which has actually declined since 2008 when it was 80 cents.

	2013	PEDESTRIANS BY INCOME (000):			2008
PARKING:	PEDESTRIANS	<$50	$50-100	$100+	PEDESTRIANS
HOW GOT TO PLAYHOUSE:					
Drove own car	33%	22%	26%	60%	57%
Walked	31%	37%	25%	23%	26%
Bus or taxi	19%	22%	25%	8%	9%
Rode with someone	8%	7%	12%	6%	6%
Biked	4%	4%	7%	2%	NA
Gold Line	4%	0%	4%	0%	1%
WHERE PARKED:					
On street	67%	76%	74%	53%	66%
Parking garage	17%	9%	15%	23%	17%
Surface lot	15%	14%	11%	20%	16%
Used valet service	1%	0%	0%	3%	0%
MINUTES TO FIND SPACE:	3	3	2	4	3
BLOCKS WALKED:	5	5	6	4	4
STOPS MADE:	2	3	1	1	2
PAID TO PARK:					
Yes	19%	15%	16%	27%	22%
No	81%	85%	84%	73%	78%
REASONABLE PRICE FOR AN HOUR'S PARKING:					
Nothing	50%	52%	46%	48%	43%
Less than $1	38%	33%	50%	35%	19%
Between $1 and $2	12%	14%	4%	16%	23%
More than $2	0%	0%	0%	0%	15%
AVERAGE	**$0.62**	**$0.62**	**$0.57**	**$0.68**	**$0.80**

2013 Playhouse District Pedestrian Survey

% Indicates data which is statistically greater than the value in the corresponding column.

Pedestrians surveyed in the Playhouse District made an average of 3 different suggestions for the tenants they would like to see added here which is comparable to the 2008 survey. Their leading requests continue to be for sit-down restaurants and more entertainment venues, even though those are already well-represented in this District. The addition of Urth Caffe in the late summer of this year will be a step in the right direction.

- Upper-income pedestrians are the most interested in having more sit-down restaurants in the Playhouse District, so this should definitely continue to be explored. The theater traffic should be a lure for a restaurant prospect.

- The category of entertainment was selected by 28% of those surveyed, off a list of tenant prospects, so it is not known exactly what additional types of entertainment would be desired. The youngest pedestrians (16 to 34 years of age) were the most likely to request entertainment, so this could mean nightclubs and bars, which were separately requested by 20% (also younger).

- A coffeehouse was requested by 25% of those surveyed, a request which was consistent across all age and income segments. The small segment of Playhouse pedestrians who have children (22%) were the most likely to want to have another coffee shop added to the District.

- Both women's apparel (24%) and men's apparel (21%) were requested by pedestrians. A smaller percentage of 14% of pedestrians would like to see more shoe stores in the Playhouse District.

- Gifts/books and arts & crafts/hobby were two other categories which received strong support among Playhouse District pedestrians, at 24% and 14% respectively.

- In the 2008 survey, 29% of pedestrians requested electronics/music stores, a retail category that has been significantly diminished by on-line and mobile applications. In this year's survey, that request had declined to 15% of those surveyed.

- There was less interest in all of the other tenant types which were listed. On an open-ended basis, a few pedestrians suggested the addition of non-chain/boutique stores, a pet store and a grocery store.

The data for what types of stores, restaurants and entertainment shoppers would like to see added to Playhouse appears below.

ADDITIONS DESIRED:	2013 PEDESTRIANS	PEDESTRIANS BY INCOME (000): <$50	$50-100	$100+	2008 PEDESTRIANS
Sit-down restaurants	31%	16%	36%	46%	44%
Entertainment	28%	36%	30%	13%	29%
Coffeehouse	25%	26%	30%	20%	23%
Women's apparel	24%	25%	25%	22%	19%
Gifts/books	24%	26%	25%	26%	20%
Men's apparel	21%	25%	22%	17%	21%
Night club/bar	20%	22%	27%	9%	22%
Fast food restaurants	16%	18%	18%	9%	12%
Electronics/music	15%	18%	14%	11%	29%
Arts & crafts/hobby	14%	15%	12%	15%	18%
Shoes	14%	19%	14%	9%	16%
Drug store	7%	7%	10%	2%	5%
Other apparel	6%	10%	4%	4%	11%
Jewelry	6%	4%	7%	6%	6%
Children's apparel	5%	3%	7%	9%	7%
Personal services	5%	5%	3%	0%	5%
Furniture/furnishings	2%	1%	3%	2%	8%
Children's goods	2%	3%	3%	2%	5%
Other (1	19%	12%	22%	24%	5%

2013 Playhouse District Pedestrian Survey

% Indicates data which is statistically greater than the value in the corresponding column.

1) Includes responses of: non-chain stores (2%), pet stores (2%), grocery stores (1%), boutiques (1%), sporting goods (1%), movie theaters (1%) and 1 person each mentioning free parking, gay bar, art galleries, mattress store, make-up boutique, Christian store, vegetarian restaurant, postal station, quarter arcade, farmer's market, health food stores, ethnic imports, Southern soul food, anime shop, bagel shop, buffet, desserts, bakery.

PLAYHOUSE DISTRICT

2013 INTERCEPT SURVEY

Hello, I'm __________ from House of Marketing, a Pasadena research company. We're conducting a short survey today with people in this area and have a certificate for a free cup of coffee from Le Cordon Bleu's Technique that we are offering to all those who participate in the survey. **(TALLY THOSE WHO REFUSE TO BEGIN)**

REFUSED TO BEGIN:

LANGUAGE BARRIER:

A. Are you employed by one of the stores or restaurants located in this area? **(IF YES, TERMINATE INTERVIEW.)**

EMPLOYED AT STORE/RESTAURANT:

1. Can you tell me how you refer to this area? **(DO NOT READ LIST)**

Playhouse District 1

Other **(SPECIFY)** ____

2. **(SHOW FIRST CARD)** In which of these age groups are you? You can read me the number.

Under 16 years .... **TERMINATE & TALLY:** ____________________________
16 or 17 years 1
18 to 24 years 2
25 to 34 years 3
35 to 44 years 4
45 to 54 years 5
55 to 64 years 6
65 years & older 7
DON'T READ| REFUSED 9

3a. **(SHOW NEXT CARD)** Please tell me how many of these categories describes you?

Came here primarily for work .... 1 **ASK Q. 3b**
Live in the Pasadena area 2
To shop 3
To dine... 4
To attend movies/other entertainment 5
For museum or performance.. 6
For other reasons 7
You are an out-of-town visitor here for business/convention.................... 8
You are an out-of-town visitor here on personal vacation......................... 9

3b. **(IF CAME TO WORK)** What is the nearest major intersection to the address where you work?

____

4. Are you a regular visitor to the district? **(IF YES, ASK)** How many times have you been in the past year?

Not a regular visitor 0

NUMBER OF VISITS: ______________________

5. How did you first learn about Playhouse District? **(DO NOT READ LIST. CIRCLE ALL RESPONSES)**

Word of mouth	1
Newspaper/magazine article	2
Brochure at hotel or convention bureau	3
Internet	4
Grew up/live in the area	5
Other means	6

6a. Are you staying overnight in the area? **(IF YES)** Are you staying in a hotel, with friends or family, or somewhere else?

Not staying overnight	1	
Staying in a hotel	2	**ASK 6b**
Staying with friends/family	3	
Staying somewhere else	4	
Grew up/live in the area	5	

6b. In which hotel are you staying?

Pasadena Hilton Hotel	1
Courtyard by Marriott	2
Sheraton	3
Langham (formerly Ritz-Carlton Hotel)	4
Westin	5
Other (specify hotel name & city	X

____

7a. **(SHOW CARD)** Which of the following other shopping areas have you visited in the past month, or 30 days?

Americana at Brand	1	Old Town Monrovia	7	
Downtown Alhambra	2	Paseo Colorado	8	
Downtown Montrose	3	South Lake	9	
Glendale Galleria	4	Westfield Santa Anita Mall	10	
Old Pasadena	5	Other area	11	
Other areas of Pasadena	6	Did not visit any of these areas	12	**(SKIP Q. 7b)**

7b. Why do you choose to shop in the areas you've just mentioned, instead of other locations? **(DO NOT SHOW LIST. RECORD ALL MENTIONS)**

Close to home/convenient	1	Safe	4
Like the stores/selection	2	Better prices	5
More pleasant atmosphere	3	**OTHER REASON:**	______________________________

7c. Did you visit **(READ EACH DISTRICTS BELOW)** today? **(IF YES)** How much did you spend there?

DISTRICTS	**DIDN'T VISIT**	**VISITED, SPENT NOTHING**	**VISITED, AMOUNT SPENT:**
Paseo Colorado	1	2	___________________
Old Pasadena	1	2	___________________
Hastings Ranch	1	2	___________________
South Lake District	1	2	___________________

8a. How did you get to the Playhouse District today?

Drove own car	1	
Rode with someone else	2	
Bus or taxi	3	**SKIP TO QUESTION 9**
Walked	4	**SKIP TO QUESTION 9**
Biked	5	**SKIP TO QUESTION 9**
Took the Gold Line	6	**SKIP TO QUESTION 9**

8b. **(IF DROVE OWN CAR OR RODE WITH SOMEONE ELSE)** Where did you park?

On the street	1
Parking garage	2
Used Valet service	3
Surface lot	4

8c. **(IF DROVE OWN CAR OR RODE WITH SOMEONE ELSE)** Approximately how many minutes did it take you to find a parking place?

____

8d. Did you, or will you eventually, pay to park today in the Playhouse District? **(CIRCLE)** Yes ...... No

8e. What do you consider to be a reasonable price to pay, for an hour of parking? ____________________

8f. How many stops did you make today before returning to your car? . ____________________

9. Approximately how many blocks have you walked today in the Playhouse District?

____

10a. Which specific stores or restaurants in this area have you entered today, or do you plan to visit before you leave? If you can't think of the specific store or restaurant names you can just tell me the type of merchandise or food you are looking for.

__________________________________ __________________________________

__________________________________ __________________________________

__________________________________ __________________________________

__________________________________ __________________________________

10b. Have you visited any museums or other cultural institutions today? **(IF YES)** Which ones?

10c. **(SHOW CARD)** Which of those types of stores or restaurants would you like to see more of, in the Playhouse District, which would cause you to come here more frequently?

Women's Apparel	1	Gifts / books	12
Men's Apparel	2	Jewelry	13
Children's Apparel	3	Personal Services	14
Other Apparel	4	Restaurants - Sit Down	15
Shoes	5	Restaurants - Fast Food	16
Arts & Crafts or Other Hobby Stores	6	Night club / bar	17
Children's goods and services	7	Coffee house	18
Drug Stores	8	Other Category (____________________)	19
Electronics / music	9	None	20
Entertainment or Recreational Activities	10	Don't Know	21
Furniture or Home Furnishings	11		

10d. **(SHOW CARD)** How many minutes do you plan to spend today in the Playhouse District?

____

11a. How much did you spend today in the Playhouse District on food and drink? **(ROUND TO THE NEAREST WHOLE DOLLAR. DO NOT ACCEPT A RANGE. RECORD "0" IF NOTHING SPENT.)**

$ ________________________ .00

11b. How much did you spend today in the Playhouse District on merchandise that you purchased? **(ROUND TO THE NEAREST WHOLE DOLLAR. DO NOT ACCEPT A RANGE. RECORD "0" IF NOTHING SPENT.)**

$ ________________________ .00

11c. And how much did you spend today in the Playhouse District on movies, plays and other entertainment? **(ROUND TO THE NEAREST WHOLE DOLLAR. DO NOT ACCEPT A RANGE. RECORD "0" IF NOTHING SPENT.)**

$ ________________________ .00

12. I am going to read you a list of attributes about the Playhouse District area. Please tell me whether you think Playhouse District is better than, the same as, or worse than other areas/shopping centers on . . . **(READ LIST AND CIRCLE ONLY ONE RESPONSE)**

	BETTER	**SAME**	**WORSE**	**DON'T KNOW**
Selection of stores/restaurants	3	2	1	9
Atmosphere	3	2	1	9
Convenience	3	2	1	9
Safety	3	2	1	9
Cleanliness	3	2	1	9
Parking	3	2	1	9

13. Now we have just a few more questions, so that your answers can be grouped with the other responses we're collecting. What is the city/area you are from; and what is the zip code of your residence? **(WRITE ONE DIGIT PER BLANK)**

____________________ ____ ____ ____ ____ ____

CITY/AREA REFUSED 9

14. Do you currently have any children under 18 years of age currently living at home?

Yes 1
No 2
(DON'T READ) REFUSED 9

15. What was the last grade of school you, yourself completed? Would that be ... ? **(READ LIST AND RECORD ONE RESPONSE.)**

Some high school, 1
Completed high school, 2
Some college, 3
Completed college, 4
Some graduate school, or 5
Completed graduate school? 6

16. **(SHOW CARD)** Which of the following best describes your occupation?

Professional / technical	1	Skilled worker	7
Administrative / supervisor	2	Laborer	8
Clerical / secretarial	3	Student	9
Retail / sales	4	Homemaker	10
Service	5	Volunteer	11
Other sales	6	Other	12

17. **(SHOW CARD)** Which number on this card closely corresponds to the yearly income of all working members of your household? **(ACCEPT ONE RESPONSE ONLY.)**

Under $25,000	1	$100,000 to $149,999	5
$25,000 to $49,999	2	$150,000 to $199,999	6
$50,000 to $74,999	3	$200,000 or more	7
$75,000 to $99,999	4	**(DON'T READ)** REFUSED	9

Thank you for your help with this survey!

RECORD FROM OBSERVATION:

RECORD THE NUMBER OF ADULTS AND CHILDREN IN RESPONDENT'S PARTY:

Adults: ______________ Children:

GENDER

Male 1
Female 2

DAY OF WEEK

Monday 1
Tuesday 2
Wednesday 3
Thursday 4
Friday 5
Saturday.. 6
Sunday.. 7

TIME OF DAY

11 am-2 pm 1
2:01 to 5 pm 2
5:01 to 8 pm................................3
8:01 to 10 p.m.............................4
10:01 to midnight 5

LOCATION:

NWC of Colorado & El Molino 1
NEC of Colorado & Madison.. 2
NWC of Colorado & Oak Knoll.. 3
NWC of El Molino & Green 4
W side of El Molino between Alley & Colorado 5
N side of Colorado between Lake & Mentor 6
E side of Mentor near Ice House 7