
DOWNTOWN SURVEY

Report of Findings and Analysis

PRESENTED TO



TUCSON REGIONAL
COMMUNITY VOICE
realizing the possibilities

July 3, 2007

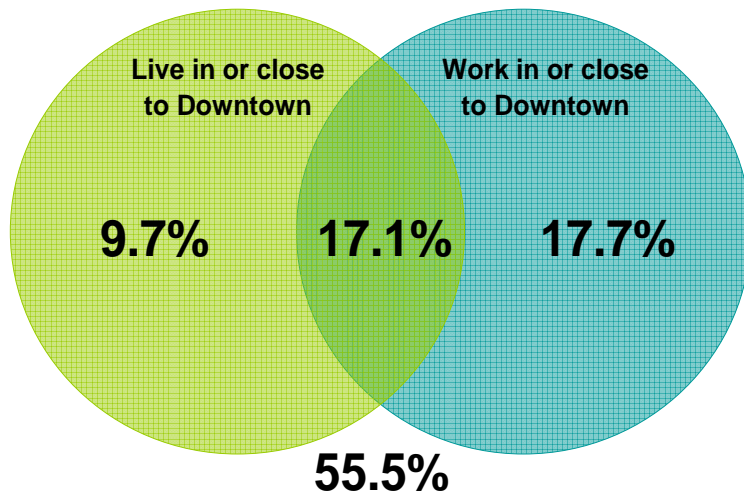


Marketing Intelligence
Marketing Research & Strategy Consultants

I. SURVEY FINDINGS

The following survey findings are based on 477 responses to a web-based survey conducted by Marketing Intelligence, a Tucson, Arizona based marketing research and strategy consulting firm. The survey participants signed up to take a series of surveys involving the Tucson Region and thus should not necessarily be considered a random sample of area citizens. However, the respondents can be characterized as a sample of area citizens who are likely to be concerned about issues affecting the local community.

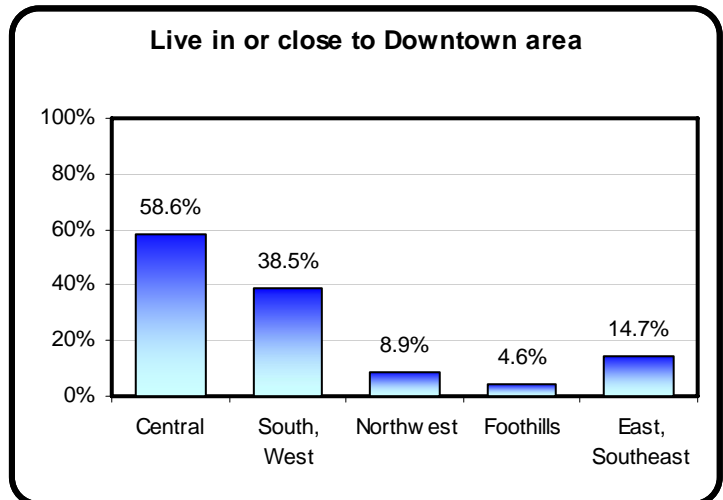
EXPERIENCE IN/WITH DOWNTOWN TUCSON

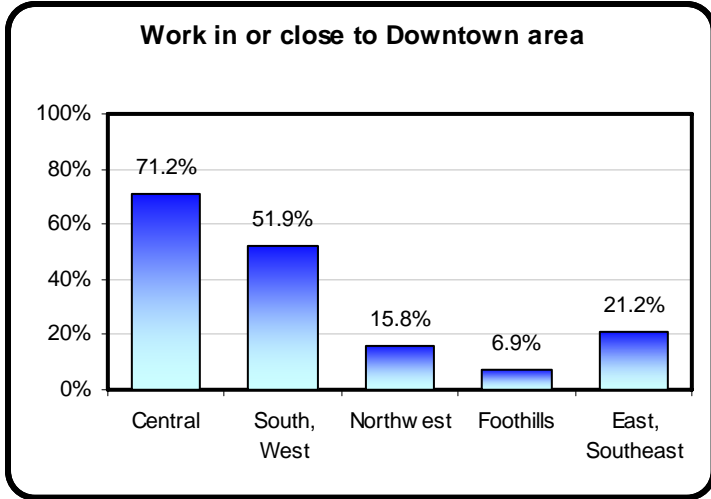


26.8% of respondents indicate that they live in or close to the downtown Tucson area. 34.8% report working in or close to Downtown.

About 17% both live and work in the general downtown Tucson area, with approximately 56% neither working nor living Downtown.

What is considered as “in or close to Downtown Tucson” is a matter of subjective opinion. Those in the Central, South and West are most likely to think of themselves as being close to the Downtown area. However, there are respondents living in the East and Southeast (and even a few in the Northwest and Foothills) who feel they live “close to Downtown Tucson.”



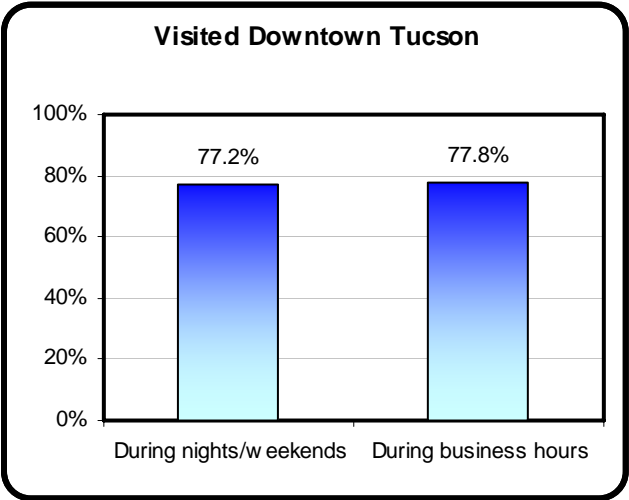


Those who work in or close to Downtown Tucson come from all over the region, and the majority of respondents in the Central, South and West indicate that they work in the general Downtown area.

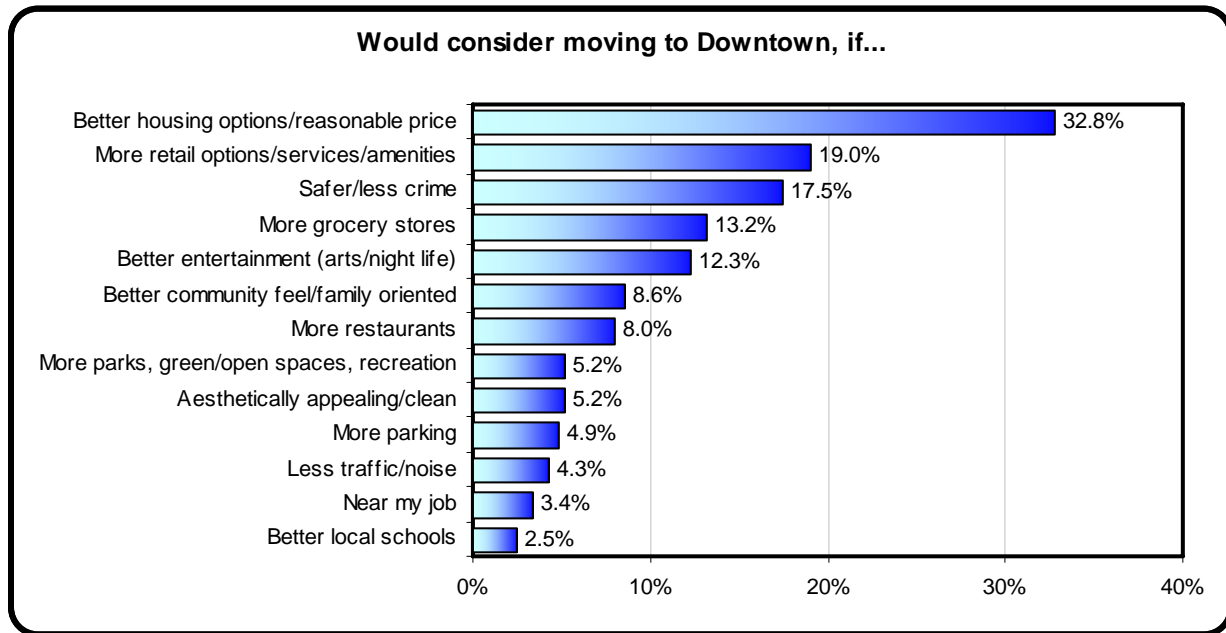
Of those who do not live in or near Downtown Tucson, greater than three-fourths have visited the Downtown area on a night or weekend at least once over the past three months, with more than half having done so at least three times (the average is 4.7 times over the three month period).

For those not working in or near Downtown, greater than three-fourths have visited the area during business hours at least once over the past three months, with more than half having done so at least three times (the average is 7.3 times over the three month period).

Only 5.9% of all respondents have not visited the Downtown Tucson area over the past three months.



ASSESSMENT OF DOWNTOWN TUCSON

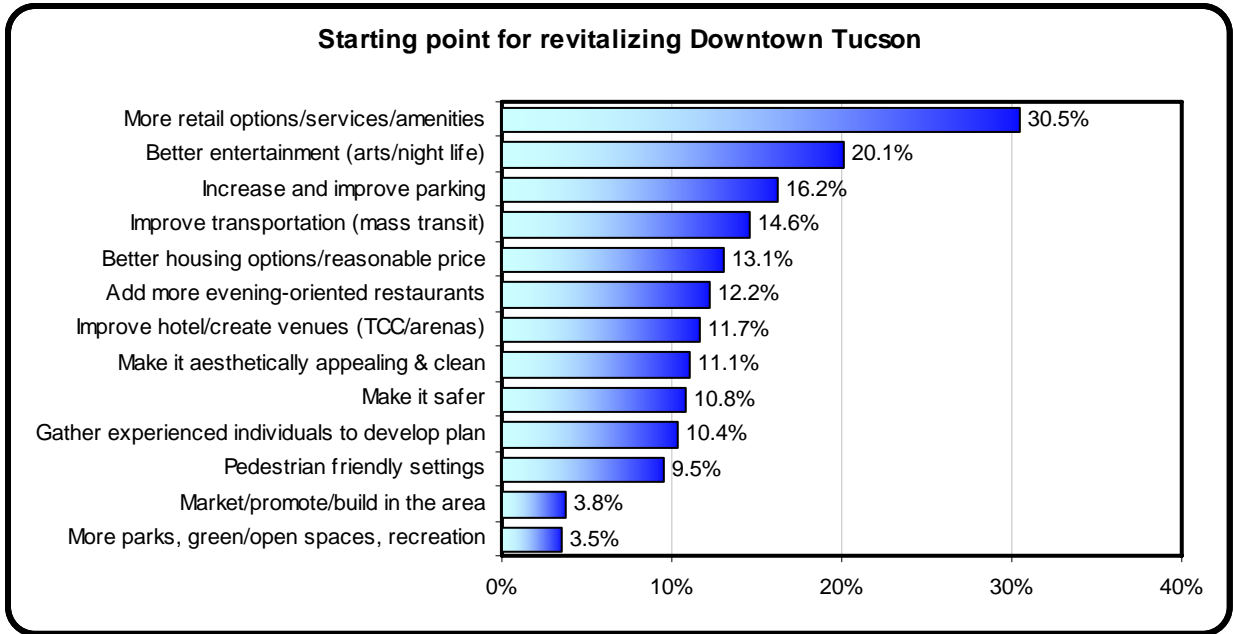


Those who do not consider themselves to be living in or close to Downtown Tucson were asked to fill in the blank for the statement “I would consider moving to Downtown, if...” Nearly one-third indicate that they would consider Downtown Tucson as a residential destination if they had more options for housing types and at price points that they could afford. The housing issue is especially true for those who are 35 years old or younger and Hispanics, and affordable housing is the most given answer regardless of ethnicity, age group, gender, length of residency or current area of residency.

Having greater commercial and entertainment options are also high on the list of desires. Downtown Tucson would be more attractive to potential residents if it offered additional retail outlets, grocery stores, night clubs and art galleries.

Safety is a big concern as well, with 18% indicating that they would be more likely to consider Downtown Tucson as a place to live if there was less crime in the area.

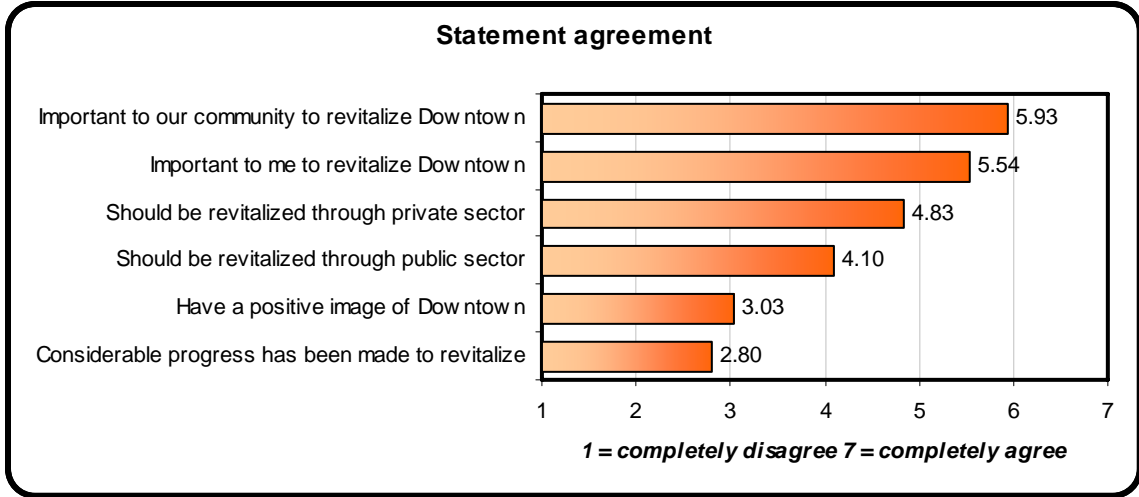
32.5% indicated that they would not move to Downtown Tucson under any circumstances.



All respondents were asked – what is the first thing they would do if they were in charge of revitalizing Downtown Tucson. Most respondents indicated they would do one of five things:

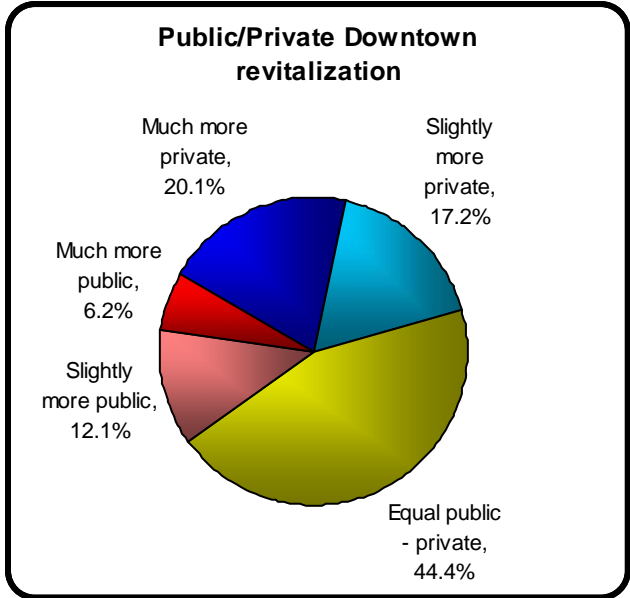
1. Create a reason for people to want to live in or visit Downtown (add more retail, restaurants, aesthetic appeal, safety, pedestrian friendly, more parks/recreation)
2. Improve the transportation infrastructure (increased/improved parking and transportation, including mass transit)
3. Make Downtown Tucson a place where all residents are able to live (better housing options with reasonable pricing)
4. Make Downtown Tucson more visitor friendly (improve hotel options, event and sports venues)
5. Have experts plan and market the area (gather experienced individuals to develop a plan, market and promote the area)

Having more retail options, services and amenities is the most frequently given response for all sub-segments, with the exception of those who live in the Central area and those who are 35 years of age or younger (both of which are more likely to start with transportation/mass transit). Hispanics and those who are 36 – 45 years old are more likely to want to start the revitalization process by creating better entertainment, art and night life options.



Most agree that it is important to both the community and them personally to revitalize the Downtown Tucson area. However, there is a general sense that little progress has been made, and few have a positive image of the Downtown area in its current state.

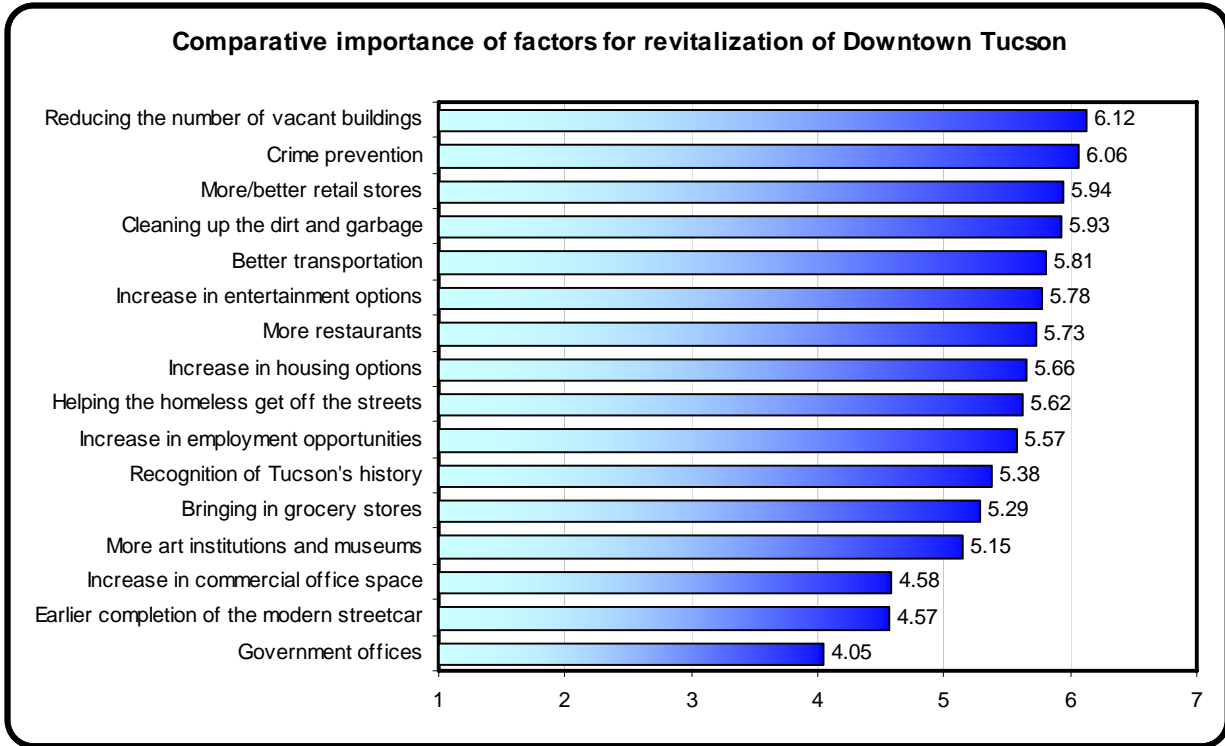
In moving forward, there is a difference of opinion as to whether the revitalization efforts should be completed through the private or public sector. These two variables are significantly negatively correlated, such that the more one feels the revitalization efforts should be accomplished through the public sector, the less likely they are to feel the private sector has a role and vice-versa.



44% feel that the efforts to revitalize Downtown Tucson should come from the public and private sectors equally. 37% feel more of the responsibility should be placed on the private sector, while the remaining 18% feel the primary efforts are the responsibility of the public sector.

Residents in the Northwest, those who have lived here the longest (21 or more years) and those who are 46 – 55 years old) are more likely to feel revitalization efforts should be led by the private sector.

Hispanics are increasingly likely to feel that more of the effort should come from the public sector.



Nearly all of the possibilities for improving Downtown Tucson were given high importance scores, with the exceptions of increasing commercial office space, earlier completion of the modern street car and government offices.

Segmentation Analysis

The following are the most important factors for each of the sub-segments:

White/Caucasians – Reducing the number of vacant buildings and crime prevention

Hispanics – Better transportation, reducing the number of vacant buildings and crime prevention

Newer residents (10 or fewer years) – Reducing the number of vacant buildings

Intermediate residents (11 – 20 years) – Reducing the number of vacant buildings

More established residents (21+ years) – Reducing the number of vacant buildings and crime prevention

35 years of age or younger – Better transportation

36 – 45 years of age – Increase in entertainment options

46 – 55 years of age – Crime prevention

56 – 65 years of age – Reducing the number of vacant buildings

66 years of age or older – Crime prevention, cleaning up the dirt and garbage and reducing the number of vacant buildings

Central – Reducing the number of vacant buildings

South, West – Crime prevention and reducing the number of vacant buildings

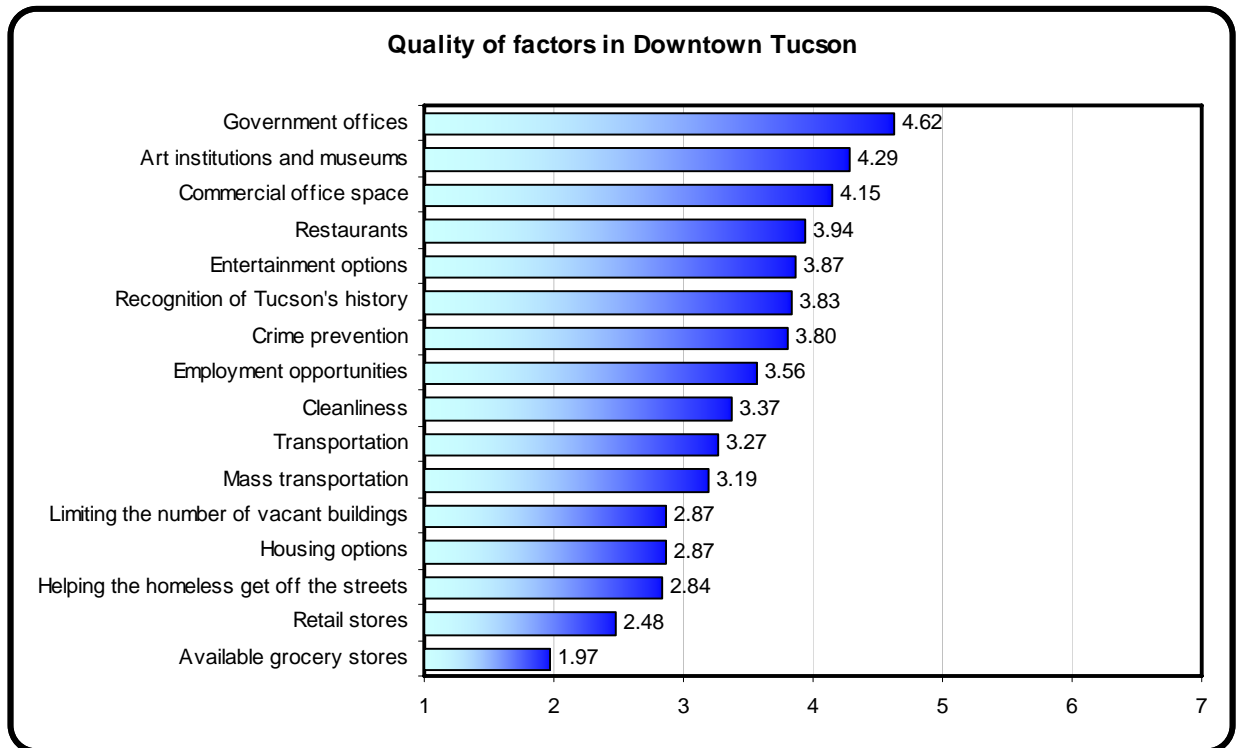
Northwest – Crime prevention

Foothills – Crime prevention and cleaning up the dirt and garbage

East, Southeast – Crime prevention, reducing the number of vacant buildings and cleaning up the dirt and garbage

Male – Crime prevention

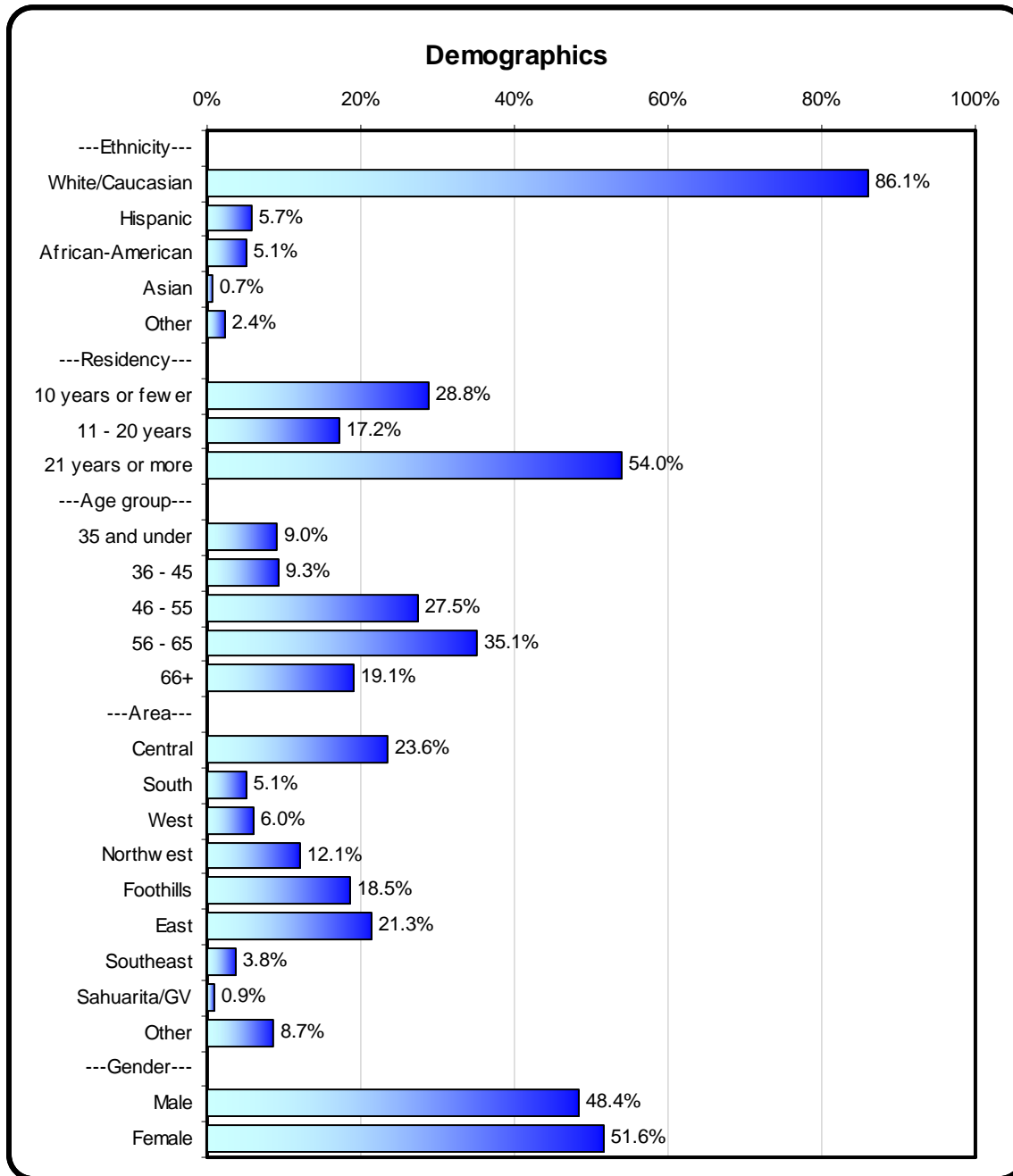
Female – Reducing the number of vacant buildings



Just as there is a general sense that most of the factors listed in the survey are considered important to the revitalization of Downtown Tucson, there is also a belief that much is still lacking in quality. Only government offices, art institutions and museums and commercial office space are above the neutral mean response of a “4.”

Limiting the number of vacant buildings, which many indicated was one of the most important revitalization factors, is very low at 2.87 on the 7-point scale. Equally low (at 2.87) is the one thing that many indicated would make them increasingly likely to live Downtown – better housing options.

II. SURVEY RESPONDENTS



Hispanics, those in younger age groups, and those living in the South, West, Southeast and Sahuarita/Green Valley are relatively underrepresented.