

EAST LIBERTY IMAGE SURVEY

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Chapter I

Introduction

Origins of East Liberty. For over a century, East Liberty was a premier shopping area in Pittsburgh, second only to the Downtown area. Set at the historic crossroads of Penn Avenue, Frankstown Avenue, Shady Avenue, Highland Avenue, Baum Boulevard, and Center Avenue, East Liberty began to thrive soon after the Revolutionary War. The original Negley Farm was nearby, and by the 1890's East Liberty was the home of such wealthy and notable families as the Mellons, Carnegies, Fricks, Westinghouses, Heinzes, and Kings. After the Civil War, other East Liberty neighborhoods housed the poor and the unsung, the immigrants--European early on and later blacks--who provided the muscle and sweat that moved Pittsburgh's mills.

Prosperity. At the center of a market area that was populous and prosperous, East Liberty by the end of World War II was a fine shopping and entertainment district. The Mansmann's and May-Stern department stores catered to the most fashionable clientele in Pittsburgh, and East Liberty's several movie theaters and fine restaurants made it an elegant place to come for a pleasant evening.

The prosperity that followed World War II transformed Pittsburgh as it did every American city, and these transformations undid the prosperity of East Liberty. The most tangible agent of these changes was the automobile. It allowed the more wealthy families to move to the suburbs, turning their homes into apartments for the students and poorer families who remained in the area. Yet they continued to commute

through and shop in East Liberty, jamming the streets with unprecedented numbers of automobiles. By the mid-1950's, urban planners were beginning to worry about slums encroaching on East Liberty, and local merchants were urban renewal plan for East Liberty. Using \$46 million in federal, state, and local government funds, the City of Pittsburgh proposed within ten years to

- 1) construct a one-way ring road around the 27-block business district,
- 2) convert the area within the ring to a landscaped, traffic-free shopping mall,
- 3) relocate 1,200 families and raze several blocks for peripheral parking, and
- 4) construct 1,200 - 1,500 medium-priced housing units for the residents whose homes were to be razed.

The intention was to eliminate the traffic jams, replace the slums, and create a shopping garden in East Liberty. By 1972, when the project was declared complete, \$100 million had been spent, and it was already causing headaches.

The project, by all accounts, was a disaster for East Liberty. The ring road routed outsiders very efficiently around and away from the shops to the new shopping malls that were rising in the suburbs. The complicated pattern of access streets inside the ring road further discouraged people from stopping and shopping in East Liberty. The well-to-do shoppers opted for the suburbs, leaving behind a low-income clientele. Petty crime and vandalism became common, accelerating the shift in clientele. The fashionable stores went out of business, yielding to discount variety stores and cut-rate clothes shops. The movie theaters have all closed and two remain vacant. Mansmann's stands vacant; the old May-Stern Department Store is now a welfare office.

The street furniture in the mall stands empty and ill-used. Trash litters the streets. Boarded-up buildings and dingy storefronts distract the eye from several impressive old buildings and a few attractive shops. East Liberty has become known as a crime-ridden, decaying, inner-city shopping area.

Rebuilding. East Liberty has not lost, however, the fundamental advantages that had made it so prosperous originally: its central location; its large market; its excellent accessibility from east, north, and central Pittsburgh; and a core of merchants committed to maintaining a viable business district there. In late 1979, the East Liberty Chamber of Commerce created East Liberty Development, Inc. (ELDI). At a planning conference in 1981, it was given a mandate to reverse the trends of the previous 15 years. ELDI was charged with 1) promoting business development in East Liberty, 2) working closely with citizens' groups and the police to reduce the crime and the perception that East Liberty is a high-crime area, and 3) in reversing the conditions of decline in East Liberty to change its public image as well.

In 1982, in its second planning conference, ELDI assessed the strengths and weaknesses of East Liberty and targeted five types of uses as particularly promising to attract to East Liberty:

- 1) small, high-growth, high technology companies;
- 2) corporate support offices;
- 3) medical, health, and recreation facilities;
- 4) historical preservation; and
- 5) market-rate housing.

Implicit in all of these is a sixth goal: retail revival.

Purpose, Scope and Methods of This Study. This report is intended to provide an initial impression of 1) the practicality of the five goals, and 2) the validity of the assumptions underlying the goals. (These assumptions are summed up in the preceding history.) The report analyzes the opinions expressed in 80 interviews on the images and conditions of East Liberty. Chapter II summarizes the general image of East Liberty that emerged from the interviews; Chapter III examines the views of particular groups as they bear of ELDI's goals.

The 80 respondents were drawn from ten groups:

1. Local merchants (12 persons)
2. Medical professionals with practices in East Liberty (8 persons)
3. Managers of local bank branches (4 persons)
4. Local property owners (12 persons)
5. Real estate agents (8 persons)
6. Corporate real estate executives (4 persons)
7. Venture capitalists (4 persons)
8. Advisors to high-technology firms (8 persons)
9. High-technology professionals (16 persons)
10. Journalists (4 persons)

Groups 1-5 were selected for their knowledge of East Liberty; groups 6-10 for their external perspective on ELDI's goals. (Shoppers and residents, although critically important groups, were omitted as being too large and diffuse for inclusion in such a restricted study.)

All the interviews and analysis were done between March 1 and April 15, 1983, by the principal investigator. Because a sample of 80 persons divided into ten subgroups is too small to allow statistical testing of conclusions, a scientifically random sample and a rigidly standardized questionnaire were neither necessary nor desirable. Respondents were chosen non-randomly,

precisely for their unique attributes--they have worked for many years in East Liberty or have been active in its civic affairs, or occupy a prominent location or a significant shop; or else, in the case of groups 6-10, their position and experience give them a useful external perspective on ELDI's goals. The interviews were free-form and loosely-structured to derive the most benefit from the respondents' expertise and experience. Appendix A gives a detailed explanation of the survey methods. Appendix B lists the respondents, and Appendix C shows the questionnaire.

Altogether, 52 of the respondents work, own property, and/or manage property in East Liberty. The remainder have no direct business interest in East Liberty, but a surprising number have some personal tie to it--they live nearby, or shop there, or have fond childhood memories of going shopping or to the movies there. Although they did not mince words about their knowledge of East Liberty's problems, neither did they speak uncaringly. To quote one executive:

I've lived in Penn Hills for 28 years and in Wilksburg before that. I do business in East Liberty. As a businessman, I've got to be frank, it has some problems, but personally I'd like to see some good come to East Liberty.

These people, all senior executives or talented entrepreneurs and intellectuals, suggest that there is a strong reservoir of goodwill toward East Liberty, which could be a major asset to ELDI in realizing its goals.

Chapter II

Images of East Liberty

picture; direct contradiction was the exception. There is a general consensus that East Liberty has all the potential to be a prosperous business area, but that several detriments prevent it from realizing this potential.

By this consensus, East Liberty's main assets as a business district are:

- 1) Central location and easy access to Downtown, East End, Oakland/Shadyside, and the eastern and northern suburbs.
- 2) Rock-bottom rents
- 3) Excellent transit connections (especially the East Busway)
- 4) Good inventory of sound commercial structures
- 5) Flat topography and good building conditions

Its most important detriments are:

- 1) Dilapidated, decaying visual image presented by boarded-up stores, dingy storefronts, and littered streets
- 2) Absence of first-class, attractive stores and restaurants
- 3) Prevalence of crime along Penn, Kirkwood, and Broad Avenues
- 4) Confusing, maze-like traffic pattern and narrow streets inside Penn Circle
- 5) Poorly-placed parking and expensive, half-hour parking meters
- 6) Bad image which deters shoppers from coming to East Liberty and businessmen from investing in it
- 7) Media coverage which exaggerates crime in East Liberty, thereby exacerbating the problem of image (recent articles on ELDI have been a welcome relief and are hoped to herald a new trend)

The remainder of this chapter reports in detail the main points of this consensus, and the images of East Liberty that emerge from it.

In analyzing this chapter it should be remembered that the consensus is one of opinions, and should be read as such. Whether the consensus is objectively valid is another question, one that is not under discussion here.

Location and Market Structure

East Liberty is well-situated and readily accessible to a large market area encompassing a variety of neighborhoods.

Once a premier shopping area in Pittsburgh, in the past 20 years East Liberty has lost its well-to-do shoppers and with them its first-rate stores. The present clientele is mostly lower-income, with a high percentage of black people. The shift in clientele was caused most directly by the urban renewal projects planned and built in East Liberty between 1960-72 (see Chapter I). Deeper causes include the general growth of suburban shopping malls and the decline of the northeastern U.S. cities.

Traffic Pattern/Accessibility

East Liberty has excellent access by car or public transit to the east, north, and central areas of the Pittsburgh area. Access from the south and from the Parkway is inconvenient.

The traffic pattern on and inside the Penn Circle is hopelessly confusing and a major deterrent to patronage of East Liberty businesses. The changes made a few years ago (opening Highland, etc.) were an improvement and the reconstruction of a two-way grid pattern would be even better. The mall fixtures and other traffic constrictions should be torn out and the space given over to wider streets and (on Penn Avenue) on-street parking.

Given the present level of demand, there is adequate parking space in East Liberty, but it is poorly located. The meters in many places are so expensive, and allow parking for such a short time, that they discourage anything more than quick errands.

Public transit to East Liberty is excellent and there is no problem with access for pickup and delivery.

Space Availability and Rents

Commercial rents are at rock bottom in East Liberty and good space is still going begging. This is due mainly to East Liberty's problems of image, crime, traffic pattern, and low-income clientele.

Crime

There is a wide range of opinion on whether crime is a problem in East Liberty. Some people say there is no crime problem in East Liberty, only a problem with people's perceptions. Others say (usually from their own experience) that East Liberty's crime is real, worse than other Pittsburgh districts, and in fact the main cause of East Liberty's decline. Most feel that crime in East Liberty is a problem, but that it is no worse than elsewhere in Pittsburgh, and that the media have exaggerated the problem that exists.

Perception of crime shows a definite geographic pattern: persons who work in Broad Street Mall and Penn Circle South/Baum Square/South Highland reported little experience or apprehension of crime; for people on Penn Avenue on the blocks east of Broad Street Mall it seemed to be a constant and serious problem.

Many people reported that East Liberty's reputation/problem with crime made it harder for them to attract employees or attract tenants. Some reported having to pay higher wages and/or increased insurance premiums. Several high-tech firms said that fear of crimes would discourage them from locating in East Liberty, either because they keep valuable equipment on the premises, or because their employees need to work night hours.

Most people felt that the police coverage of the area was good or excellent. A minority thought that the police were not visible enough, or that they spent too much time in or around a few favored establishments.

Mix of Stores

East Liberty is generally seen to have, for a shopper a lack-luster, unoriginal mix of stores. Aside from Sears, there is nothing there worth a special trip, and people who go to Sears generally do not enter Penn Circle. There are too many shoe stores and cut-rate variety stores, and a conspicuous lack of first-rate clothing stores, restaurants, and department stores. Storefronts are considered, with certain exceptions, to range from dingy to drab.

Merchant Attitudes and Practices

A small group of local merchants spends much time and energy trying to reverse East Liberty's decline; most are apathetic or without hope. Some work together and draw on each other's strengths; most are too busy worrying about their own shop to worry about the district as a whole. Joint promotional efforts have been tried in the past and failed. Merchants now advertise independently or not at all.

Most merchants believe that a mall-like arrangement for the circle (that is, where the merchants form themselves into a common association, jointly financed, to handle security, litter collection, joint promotional campaigns, common or complementary store hours, etc.) would be a boon to the area, but would probably fail for three reasons:

- Chain-store managers would not have the freedom to participate.
- Many independent merchants would not care to participate.
- Security guards and little patrols would solve symptoms, not causes, of problems; joint advertising campaigns would fail as they did before; and no merchant would surrender control of his store hours. The important thing is to attract a better class of stores and shoppers.

The Chamber of Commerce has generally had good ideas, but it has not accomplished much or been very visible. The consensus is that it has not been particularly effective, but that the formation of ELDI has been a solid step in the right direction.

Neighborhood Appearance

East Liberty is generally considered to present a decaying, declining appearance, due to the prominence of boarded-up storefronts, drab window displays, aging paint jobs, and littered streets. Certain buildings stand out as conspicuous exceptions: the churches (especially the Presbyterian Church), the Highland Building, Motor Square Gardens, the Carnegie Library, and Medical Center East. "Most Conspicuous Eyesore" Awards go to the old Mansmann/Beatty complex (now under renovation), the Penn-Highland Building (formerly the May-Stern Building), the row of vacant storefronts extending west from the old Regent Theater on Penn Avenue, and the vacant Sheridan Square Theater.

All agree that the streets are dirty. Some blame the cleaning crews, some the people who use the area, some the "wind-tunnel" formed by Highland Avenue; some say the litter cans are too small and too few. Snow removal was mentioned as a problem in some areas.

Street lighting is generally considered mediocre to inadequate, especially along Penn Avenue where the stylish globes attract vandals. Some mentioned chronic problems with the wiring.

Street repairs were generally considered adequate. Some felt that the asphalt sidewalk material and the cobblestones of Penn Avenue need repair too frequently.

Historical Traditions

The past has left a particular place name and several striking buildings which serve to identify East Liberty in people's minds, but people are generally unaware of East Liberty's long

and colorful local history. The older residents remember (and feel nostalgia for) the years of East Liberty's prime; for the rest, history begins with the 1960's or 1970's and the renewal projects.

Conclusion. The general public image of East Liberty can be summed up in a few words: unsafe, decaying, drab, poor. The media have exaggerated this image by mentioning East Liberty mainly in connection with crime stories, and by locating in "East Liberty" all crimes reported to Station 5, even though many of these crimes were committed in other neighborhoods covered by the same station.

A second, independent image is rooted in the traffic pattern: East Liberty is confusing and inconvenient to go to or through, especially by car. This image is reinforced by the generally undistinguished mix of stores in East Liberty: there is nothing in East Liberty worth suffering the inconvenience necessary to get to it, and what is there can be gotten more conveniently elsewhere.

A third image, restricted more to the business community, is one of great potential. Many businessmen mentioned the factors that could make East Liberty an advantageous location: low rents, large market, centrality and ease of access to many important parts of the region (the difficulties of passage and parking in Penn Circle excepted), and the good stock of buildings, several of which are architecturally striking. Among many older people (including the senior personnel of many firms), this image is reinforced by memories of what East Liberty once was.

For those who live and work in East Liberty, or visit it frequently, these images are based on personal experience. They have seen the shoppers

walking on the sidewalks or waiting for the bus; they have seen the storefronts, the boarded buildings, the littered streets; they have seen crimes committed, or been their victims; and many remember the same streets twenty or thirty years ago.

Those who have never visited East Liberty base their image primarily on media reports or conversations with friends and business associates.

None of the images seem to be rigidly held. People familiar with East Liberty also were aware of the changes that are occurring or could occur there. Those who were not familiar with East Liberty were aware of their unfamiliarity and willing to change their ideas in the light of new information. Thus the images are open to revision.

Chapter III

Points of View and Implications for ELDI's Goals

While there is little direct contradiction among the respondents' general images of East Liberty, there are some differences in emphasis on the various facets of the images. The differences arise from a variety of circumstances, including their occupation or business, precise location, familiarity with East Liberty, and personal character and background. The most useful way to divide them initially is by the goal activity they know most about:

- 1) High technology firms (high-technology entrepreneurs, business advisors, venture capitalists)
- 2) Corporate support offices (corporate executives)
- 3) Medical and health facilities (medical professionals)
- 4) Historical preservation (those familiar with East Liberty)
- 5) Retail revitalization (merchants, bank branch managers, real estate agents, and property owners, journalists)

Thus this chapter considers the particular opinions of each group as they pertain to ELDI's goals, and the specific characteristics of each group that underlie their opinions.

Goal 1: Attracting High-Technology Firms. The groups whose observations bear particularly on this goal are the high-technology professionals, the advisors to high-technology firms, and the venture capitalists. The professionals were asked to evaluate East Liberty specifically in terms of the needs of their kinds of firms, so their comments tend to be precise and specific to their own company. The advisors were asked to speak of "high-tech firms" in general (insofar as that was meaningful), at the expense of precision.

The venture capitalists, it turned out, as a rule take little interest in management decisions such as location, and so had little to add to the advisors' comments.

The first point that everyone made was that high-technology firms are not a homogeneous collection of companies. The professionals included five people with computer software/servicing firms, and nine with firms producing computer hardware or medical or scientific instruments. About one-third of each type of firm was still in the start-up phase; two-thirds were in production. Two technical schools were included because they had recently moved from East Liberty to Downtown.

Different firms have different critical needs, some of which cannot be met in East Liberty. For example:

- 1) Production firms generally need extensive space for operations and more for growth. They also need ready access to highways and the airport, both for shipping and for marketing or service agents who travel. Adequate space is much more easily found in the RIDC Parks, and, for East Liberty, access to highways and the airport is relatively difficult. (Note: Most but not all respondents did not know that some large buildings in East Liberty stand all or partly vacant.)
- 2) Certain firms have clients visiting their office constantly. For them neighborhood image is critical, and East Liberty was unanimously considered inadequate by the many people who commented on this. The prominence of boarded-up buildings, dull storefronts, and cut-rate stores, plus the reputation for being unsafe, all made East Liberty undesirable for these kinds of firms. In the same vein, many people added that the confusing traffic pattern in

Penn Circle and the difficulty of giving directions to Penn Circle (say, to a stranger flying in from out of town) would pose an additional handicap.

- 3) Many firms have extremely valuable production equipment or proprietary data, and for them the protection offered by an industrial park or a suburban setting is invaluable.
- 4) Where the principal members of the firm live is a powerful factor in locating otherwise footloose firms. East Liberty has an advantage if the principals live in East End or near the universities, but a disadvantage if they live elsewhere or are scattered over the Pittsburgh region.

Thus, ELDI cannot attract "high-tech" firms in general; it must look for a particular type of high-tech firm. The type most likely to be attracted to East Liberty was generally considered to be the small start-up firms, probably closely tied to a university or hospital, that "don't care about looks and are insensitive to services and amenities," to quote one advisor, and that move out when they need to expand. Computer software, business services, and small-scale research and development firms were mentioned as likely candidates. These firms generally need to minimize rents, transport, and other front-end costs, remaining as flexible as possible to cope with erratic cash flows and the needs of expansion.

This general image was contradicted on two points by the particular opinions of the five professionals in small software and servicing firms. Three of them noted East Liberty's poor appearance and its distance from the highways. Concerning appearance, one person noted, "We've established our corporate image by now, and we do all our business by telecommunications, so we could survive in East Liberty,

or anyplace else. But if we'd had to start out there, we'd never have made it. The place does not project success. You're dealing with mind-sets, and how to change them." In this case, East Liberty did not appeal until after the firm was established, and free to move to a low-rent area. Another person, whose work involved computer servicing, said that his firm required access to the highway. When a client called, he had to be able to respond quickly, and this required a lot of driving. Thus, while East Liberty could offer hospitable conditions for many start-up firms, it will not be desirable for all of them.

The few people who speculated about future locations in the area felt that the Baum/Morewood area would draw firms first, being closer to the universities and hospitals, and that later firms would spread to the Penn Circle area.

Overall, the characteristics of East Liberty currently rule out attractiveness for high-technology firms requiring extensive space, valuable equipment or information, extensive client contacts, or easy access to the highways or airport. It is probably most attractive to smaller or younger firms needing only low rents and proximity to the universities or hospitals, although the Baum-Morewood area may be somewhat more attractive to these firms. Strategies aimed at making East Liberty more attractive should focus first on the physical appearance of the area, and second, amenities and security. The best promotional strategy, though, was generally considered to be publicity about what activities and improvements are underway, who is in East Liberty, and who is moving in.

Goal 2: Attracting Corporate Support Offices. Corporate support offices are peripheral offices devoted to clerical functions, information storage and transfer, engineering drafting and design, and other activities that need not be done in the Downtown headquarters of a large corporation. To assess East Liberty's attractiveness for these kinds of offices, the survey included interviews with senior real estate executives of four of Pittsburgh's largest corporations. These four interviews suggested five important criteria for locating such offices:

- 1) Rents must be competitive. Outside of the Downtown area rents are generally in the \$15-\$19/sq.ft. range, being somewhat towards the low end in South Hills and towards the high end on Northside. (By comparison, rents in Medical Center East are around \$9 sq.ft.)
- 2) Only top-grade office space is considered, and it would be required in large quantities.
- 3) It must be immediately accessible to commuting routes. At least one firm generally considers only sites along the Parkway between Monroeville and the airport.
- 4) It must be safe and have the image of a desirable place to do business.
- 5) It must have good restaurants and shops nearby.

Rents are clearly low, but East Liberty gets a minus on all the other criteria. East Liberty was considered more a commercial than an office area, with inconvenient access to major commuting routes. The poor image stemmed mainly from the reputation for crime, the boarded-up buildings, and the lack of first-class shops and restaurants. These opinions suggest that ELDI may want to investigate more carefully before committing significant resources to this goal. A more extensive investigation might also consider the support-office requirements of government, smaller companies, and non-profit organizations; their requirements may differ somewhat.

Goal 3: Attracting Medical and Health Activities. The respondents most competent to comment on this goal are the medical professionals. They include two directors of women's health clinics, one director of a graduate-level psychoanalytic training institute, two dentists, a pediatrician, a podiatrist, and a psychiatrist. All have their offices in the Highland Building or Medical Center East. Two have practiced in East Liberty for more than thirty years, five for 5-10 years, and one for one year.

Their interviews pinpoint several local factors as crucial or important in deciding where to locate medical clinics or practices:

- Office rents
- Proximity to/accessibility for patients
- Proximity to public transport
- Parking spaces for patients and staff
- Proximity to colleagues (for consultation)
- Police services
- Security/low crime rate
- Street cleaning/maintenance services

The interviewees consistently rated East Liberty satisfactory or better on the first six of these factors. Several of them also noted another neighborhood plus: many kinds of people mix and do business here. Thus East Liberty is socially as well as physically accessible to a wide range of people, and a comfortable place for people who prefer not to be noticed when they seek out medical and health services.

The respondents consistently noted four disadvantages of East Liberty, the first of which is important or crucial to these respondents:

- 1) Dirty streets and dingy, dilapidated storefronts.
- 2) Nearby parking meters are expensive and allow much less time than necessary for certain medical services (e.g., minor surgery or psychiatric consultations can routinely require four hours or so). Patients frequently complain of getting \$25 tickets while they are in consultation.
- 3) The confusing traffic pattern (exacerbated by the constant road repairs and reroutings throughout the city) make it difficult to give directions to new patients.
- 4) Some first-class shops and restaurants would be appreciated both by the professionals (for lunchtime activities) and for patients and those who accompany them to long appointments. (The Pyramid was consistently mentioned as the only first-class restaurant in this area.)

There was some disagreement over whether East Liberty is unsafe. One doctor stated flatly that he thought East Liberty was a safe place and that it had no crime problem. The directors of the two women's clinics, both of which keep night hours and whose patients are among the most vulnerable to violent crime, both reported no problems for either the staff or the patients. To quote one of them:

"Crime is always an urban problem, but it's been a minimal problem personally and for our staff and patients. Oh, occasionally someone requests a daytime appointment or prefers a suburban or a downtown clinic, but that's about it. There have been times when I've had to work until midnight and I've felt safe taking the bus home. The same is true for the staff. Of course, we encourage each other to take self-defense and assertiveness training and to learn how to deal with facing the fears of urban life, and our patients tend

to be those kind of women too. Other groups of women might be more afraid or feel more in danger."

Indeed, none of the eight persons mentioned any violent crimes against themselves, their staff, or their patients (although two reported mysterious thefts from their offices). What the other five did speak of, however, was the fear of crime against their patients. One person refused to offer evening appointments solely because of the risk he perceived, and another avoided evening appointments whenever possible. Another, who treats many older people, said he had to agree to walk some of them to their car before they felt safe leaving his office even during the daytime.

Part of the explanation for these divergent views surely lies in the different types of patients the doctors treat. Another part seems to be that Broad Street Mall and the Baum-South Highland-Penn Circle South blocks are sheltered areas within the Penn Circle (this is corroborated by merchants and property owners in the areas). The medical professionals are all located in two multistory office buildings in these areas, and the buildings have security guards in the lobby. Their immediate environments are relatively safe, but adjacent areas--Penn Avenue and the blocks east of Broad Street Mall--are not so safe (this, too, is corroborated by the merchants and property owners). The perception of risk may depend, not only on the type of patients, but also on the extent to which the respondents and their patients must traverse the more hazardous zones.

There is a general consensus that, to attract more medical and health activities, ELDI should publicize East Liberty's strengths (especially its rent levels and accessibility). Immediate efforts at improvement should focus on cleaning the streets, brightening the storefronts, revising the

parking meter limits (and costs), and simplifying the traffic pattern. Beyond that, a broader revitalization is necessary: When there are more people in East Liberty, East Liberty will be able to support more medical professionals.

Goal 4: Historical Preservation. Many respondents remarked on the attractiveness and historic value of some of the churches and larger buildings. They noted that their preservation gives a distinct visual impression to the area and would contribute pleasingly to any revitalization efforts. Beyond that, few people had much idea of the history of East Liberty beyond their personal experience in the area (although, for a few respondents, these memories go back 40 or 50 years), and none had any idea of any themes or symbols that could play a role in ELDI's efforts.

Goal 5: Retail Revitalization. The groups with particular insight into this goal are the merchants, bank branch managers, commercial property owners, and commercial real estate agents; the journalists added a useful external perspective. The views of these groups is set forth in Chapters I and II. Although these respondents have a wide range of occupations, their locational decisions are influenced by a similar group of factors:

- Proximity to markets, customers, and transit routes
- Local rents
- Availability of parking
- Police services
- Security from crime
- Street cleaning and area appearance, and
- Local attitudes toward business

These groups generally rated East Liberty high on the first four and low on the last three. However parking space, while available in adequate supply, was considered to be poorly placed for most businesses.

The only important internal division among these groups was geographic. As mentioned above, Broad Street Mall and the Baum-South Highland-Penn Circle South triangle seem more protected and secluded, while Penn Avenue and the blocks to the east of Broad Street Mall are more exposed to crime, litter and blight. People in the latter areas had numerous, specific, and first-hand complaints about street crimes, vandalism, and littering, and about the poor appearance of their blocks. Merchants in the former areas had fewer first-hand complaints, and were more likely to blame East Liberty's problems on its image. Some were quite aware of the two zones, and the Baum block was said by several to have once been part of the blighted zone, but to have improved with the closing of a State liquor store and a bar.

There were other internal divisions--the merchants were more likely to criticize the parking meter costs/timing, and problems with absentee landlords; people on Penn Avenue criticized the street lighting most often; the journalists (who knew East Liberty mainly as shoppers and commuters) focused on the confusing traffic pattern, the undistinguished stores, and the fear of theft and crime--but there was a much stronger tendency to internal consensus and convergence with the other groups. Low rents, central location, easy access to a large market, and a good mix of neighborhoods stood out as the major advantages. The major problems were petty crime and perception of East Liberty as an unsafe area; the confusing traffic pattern; the poorly-placed parking; the dingy storefronts and littered streets; and the lack of quality stores and restaurants. The merchants, bank branch managers, property owners, real estate agents, and journalists, like the other groups examined in this paper, consider these to be the top priority problems for East Liberty.

Chapter IV

Conclusion: Re-establishing Attractiveness

The eighty interviews conducted for this study yielded a clear consensus on the image of East Liberty: unsafe, decaying, drab, poor, inconvenient, unattractive--yet with the potential to be vibrant and prosperous. The respondents were equally clear about what needed to be accomplished to reverse the image and realize the potential. Whether ELDI is trying to attract high-technology firms, corporate support offices, medical and health professionals, or retail merchants, there was general agreement that East Liberty's image will not change until its reality does. The following specific measures were mentioned as crucial or important to all of the groups the ELDI is interested in attracting:

- Refurbish the vacant buildings and brighten up the storefronts;
- Keep the streets clean;
- Reduce crime where it is common;
- Correct the general misconception that crime is worse in East Liberty than in other business districts of Pittsburgh;
- Simplify the traffic pattern in and around Penn Circle, widen Penn Avenue to allow on-street parking, and remove the wide sidewalks and the remnants of the Mall to improve traffic flow; and,
- Establish some first-class shops and restaurants in the area (the Pyramid is currently a lone pioneer).

Less important overall, but crucial to some medical and retail activities, is a revision of the parking meter charges to allow longer-term parking for less money.

The broader goal to which these (and any other) measures should be directed is filling East Liberty's vacant commercial spaces and attracting a better class of shoppers. Toward this end several longer-term goals were mentioned:

- Attract to East Liberty a magnet to draw people in (a major retailer or department store, a major corporate office, first-class restaurants or attractive specialty shops);
- Set out a coherent overall plan and obtain the cooperation of the city government;
- Ensure that the local merchants work together; and
- Involve the residents as well as the business owners

Any campaign to bring businesses or shoppers to East Liberty must be carefully targeted to a specific audience. The following were suggested as themes or points that might be useful in such campaigns:

- Low rents
- East Liberty is as safe as other Pittsburgh shopping areas
- Conveniently accessible to central, north, and east Pittsburgh, and the university district
- Transit connections (especially the East Busway)
- Availability of commercial space/value of buildings/flat topography
- Availability of parking space
- Opportunity - still some good buys - those who wait will lose out
- Amid a large and varied market in a densely populated area
- An eclectic neighborhood where all kinds of people mix comfortably
- A pleasant place to work and live
- "New East Liberty" (focus on a positive future, not the negative present or the past that is gone)
- Revitalization/Renaissance/Coming back
- Convenience - one-stop shopping
- Give more publicity to the Farmers' Market

More important than any theme is to get good news in circulation: make sure positive steps and achievements get publicized and reported.

Most important to ELDI's goals, however, is to reestablish the attractiveness of East Liberty by improving its physical appearance, security, amenities and traffic pattern. The core image of East Liberty is drawn from perceptions of these conditions. The image cannot change much until the conditions do.

Appendix A:

Survey Methods

This survey was designed to assess how various groups of people view East Liberty as a business location, as well as the locational needs of several types of businesses that might be important in East Liberty's future. Due to constraints on time and resources, the sample was limited to 80 people, large enough to gain an initial impression, but too small to support quantitative statistical analysis. All interviews and analysis were done between March 1 and April 15, 1983, by the principal investigator. Appendix B lists the interviewees and Appendix C reproduces the questionnaire.

Sample. The 80 people were chosen from the following ten groups:

1. Merchants (12 persons), all owners or managers of retail establishments in or on Penn Circle.
2. Medical Professionals (8 persons) who have practices or administer clinics (or, in one case, a specialized institute of advanced training) within Penn Circle. They were chosen at random from tenant lists of the Highland Building, Medical Center East and 5808 Eva Street.
3. Bank Branch Managers (4 persons) of bank branches within Penn Circle.
4. Property Owners (12 persons) who own parcels in Penn Circle. They were chosen from county tax records so as to include: 1) owners of big parcels, 2) owners of numerous parcels, and 3) owners of single small parcels. They include both direct property owners and key persons in companies that hold corporately-owned properties. Owners that use the most important portions of their parcels (e.g., ground-floor, street-front) as the premises for their own business were excluded.
5. Real Estate Agents (8 persons) located in, managing properties in, or knowledgeable of the Penn Circle area.
6. Corporate Real Estate Executives (4 persons) were included to gain an initial impression of East Liberty's attractiveness as a site for corporate support offices. The interviewees are senior executives in the commercial real estate divisions of industrial corporations chosen from a list of Pittsburgh's 50 largest employers (see Pittsburgh Post-Gazette, January 24, 1983 p. 34).
7. High-technology Professionals (16 persons) were included to gain an impression of the locational needs of young, growing high-technology firms and how their key personnel view East Liberty. Firms were selected from suggestions by high-tech

advisors (see below); the particular officer was located by asking for "the person who knows the most about why the company is where it is."

8. Advisors to High-technology Firms (8 persons), including university professors and executives in non-profit organizations that advise high-tech entrepreneurs, were included to gain another perspective on the needs of high-technology firms and East Liberty's attractiveness to them.
9. Venture Capitalists (4 persons) offered a third perspective on high-technology firms, their needs and the suitability of East Liberty for them.
10. Journalists (4 persons), including one person from each of Pittsburgh's two major TV stations and daily newspapers, were included to gain a perspective on East Liberty's media image.

Conspicuously absent from the survey are shoppers and neighborhood residents. These groups are simply too diffuse to include in such a limited sample. As it turned out many people in the sample happened to shop in East Liberty or live nearby, so this perspective was not entirely absent.

The sample included twelve women and eight blacks. All of the merchants, medical professionals, bank branch managers, property owners, and real estate agents, and half the high-tech firms, were selected for having direct business or property interests in the Penn Circle area. The others were chosen for different reasons, but half of them turned out to be personally familiar with East Liberty--they grew up there, or live nearby, or shop there, or visit on business from time to time. Thus only fourteen respondents were not generally familiar with East Liberty, and of them only one had no impression at all of it.

Since a sample of 80, especially when it is divided into ten groups, is too small to allow any meaningful statistical analysis, no attempt was made to ensure a scientifically random sample. Interviewees were contacted because their positions gave their views importance, or because they had long worked in East Liberty, or been active in its affairs, or seemed interesting, or simply because they were accessible. There was a deliberate attempt to

seek out people in different businesses and situations--big and small, newcomers and old-timers, successful and failing, people in different locations--the point being to capture a wide variety of views so as to isolate the points of consensus and the limits of debate.

Interview Procedure. Since no rigorous statistical analysis was possible, strict consistency between the interviews was unnecessary. The interviews were structured only loosely, in order to be applicable to many kinds of people and under many different conditions. Each interview had four parts: an introduction, questions on East Liberty, a location orientation survey (given only to merchants, professionals, high-technology firms, and advisors), and background questions on the business or property of the respondent. A standard set of topics was covered in each part, but the precise questions and the order of the parts varied from interview to interview.

In each case, the respondent was told that the interviewer was "working with East Liberty Development, Inc. doing a survey to help them target their efforts to bring more business into East Liberty." Individuals already located in East Liberty were told, "We're trying to gather opinions from different segments of the community, and one group we're particularly interested in hearing from is (merchants, property owners, etc.)." Individuals located outside East Liberty were told, "ELDI has set out some preliminary strategies and one of the types of business it's particularly interested in is making East Liberty attractive for (high-tech firms, corporate support offices, etc.)." All respondents were guaranteed that their remarks would be kept confidential between the interviewer and the Executive Director of ELDI. Where possible, a personal interview was arranged; otherwise, the interview was done by telephone.

The interview proper began with a few questions (confirmation of name and position, type of business, interviewee's familiarity with East Liberty)

that helped to determine how questions would be asked. There were two sets of questions, a detailed set for those familiar with East Liberty and a general set for the others. Both sets began with the same question: "What are the main advantages of East Liberty as location for your type of (business, medical practice, etc.)? What are the disadvantages?" The question was varied from subgroup to subgroup (e.g., "If a friend came to you and said he was planning to start a high-tech firm like yours and was thinking of locating it in East Liberty, what would you point out to him about East Liberty, pro and con, as important factors to consider in reaching a final decision about the location?") In all cases, though the point of the question was to learn, without suggesting anything, what the respondent considered to be the most important traits of East Liberty.

The rest of the questions on East Liberty probed the respondent's views on ten topics: location and market population, neighborhood and media images, traffic pattern/accessibility, space availability/rents, labor pool, crime, mix of stores, merchant attitudes and practices, neighborhood appearance/adequacy of municipal services, and historical traditions. The topics mentioned initially by the respondent were taken up first, and the others brought up later. Where appropriate the topic was slanted toward the interests of the respondent. Under "mix of stores," for example, merchants were asked if East Liberty had a well-rounded retail district; medical professionals whether it had a good range of medical services; business executives whether it had the services and amenities needed to run a business, etc. In all cases the interview ended with a summary question: "If ELDI were to undertake a campaign to attract more business to East Liberty, what themes or aspects of East Liberty would you recommend as most important or fruitful to stress?"

Survey Reliability. Since rigidly standardized questionnaires and objective statistical reliability were considered neither necessary nor desirable, the questionnaire and the interviews were designed to be flexible and free-form and to learn as much as possible from each respondent. Thus the validity of the survey rests on the perceptions and professional judgment of the principal investigator. The findings that are significant or surprising, in the perception of those who evaluate this report, will suggest the subjects of the subsequent, more detailed research.

Appendix C:

Survey Questionnaire

Interviewer:

M* HT HP F PO RE BA J BB CE

CONFIDENTIAL

I. BACKGROUND

1. Interviewee _____ 2. Title _____
3. Firm _____ 4. Phone _____
5. Address _____
6. Type of Business _____
7. Year started: Firm _____ This Office _____
8. How did you happen to locate in the Pittsburgh area?

9. How did you choose this particular neighborhood?

10. Is the head of the firm a longtime resident of the area?

* KEY: M-Merchant HT-High-Tech firm HP-Health professional
F-Financier PO-Property owner RE-Real estate agent
BA-Business Advisor J-Journalist/Media CE-Corporate executive
BB-Bank Branch Manager

II. Perceptions of East Liberty (General questions)

1. How familiar are you with East Liberty?

2. How have you learned about it?

- media
- friends, relatives
- business associates
- personal visits
- used to live/work there

3. (RE, J, BA) If a friend were thinking of opening a (hi-tech/professional/retail) business in East Liberty, and asked your advice about the location, what characteristics of East Liberty would influence your advice?
(good points, bad points)

(F) If someone came to you with a (hi-tech/professional firm/retail) investment proposition to be located in East Liberty, how would the location influence your evaluation of the proposal? (pluses/minuses)

(PO) What kinds of businesses do you think your East Liberty sites are especially suited for? Why?

4. What are your impressions of East Liberty with regard to its:

- traffic pattern/accessibility
- physical layout/appearance
- space availability/rent levels
- security/crime rates

4. Impressions of East Liberty (continued)

- labor pool/hiring

- mix of stores

- merchant attitudes, practices

- historical traditions

5. As a business location (for hi-tech/professional/retail concerns), how do you think East Liberty compares with other Pittsburgh locations (Oakland, Shadyside, Downtown).

6. How would you describe the prevailing media image of East Liberty? Do you think this picture is basically accurate?

7. Do you think conditions will grow more or less favorable for East Liberty over the next few years?

8. All in all, what do you think could best be stressed about East Liberty to attract more businesses? What is most important to overcome?

9. Any advice for East Liberty Development, Inc. in its efforts to attract more businesses to locate here?

II. Perceptions of East Liberty (Detailed questions)

1. What are the most important assets of East Liberty for your business?
(List two or three)

2. What are the two or three most important detriments?

3. Do you think the following aspects of East Liberty add or detract from your business? (Follow-up questions listed after each topic)

A. Location/Local Population/Market Size

- Close enough to suppliers/customers?

- Large enough market size?

- Well situated and accessible in relation to market?

- Good neighborhood/right income bracket for your merchandise?
Age/ethnic profile?

B. Neighborhood Image

- How do the media portray East Liberty? What aspects do they stress?

- Do you think this picture is basically accurate?

- Does/would locating in East Liberty help or hinder your efforts to:
 - Hire staff

 - Draw customers

 - Obtain financing

- What aspects of the neighborhood are relevant?

C. Traffic Pattern/Accessibility

- Do you depend on pedestrian traffic for your clientele? Do you get the right mix of people for your clientele? Is it busy enough here? Are the social agencies (welfare, employment) a plus or a minus in drawing people? How about the local schools?
- Are the recent changes an improvement over the mall? Was the original pattern better?
- Is there enough parking to accommodate customers? Are the meters a deterrent? How about the placement?
- Enough transit access for customers without cars?
- Adequate access for pickup and delivery?

D. Space Availability/Rents

- How do rents here compare with elsewhere in Pittsburgh? Are rents a deterrent or drawing point?
- Is there space available that could house a business of your type?

E. Labor Pool

- Is East Liberty a good area for recruiting labor?
Any difficulty getting employees with the skills you need?

- Are wages noticeably higher or lower here?

- Local school graduates skilled?

- Any problems with work force (absenteeism, high turnover, etc.)?

F. Crime

- Real or illusory problem?

- Recent or long-term problem?

- Has your establishment/staff ever suffered shoplifting -
vandalism - personal harassment? How frequently?

- Patrons ever victimized? Neighbors?

- Police response?

- Insurance rates gone up?

- Is this worse, better, or about the same as other
districts? (downtown, Oakland, Shadyside, etc.)

- Is it something the police could do something about?

G. Mix of Stores/Sears

- Do you benefit from any neighboring establishments?

- Is East Liberty missing any kinds of establishments that would complement yours?

- Would you benefit from having a strong restaurant/entertainment/recreation establishment here?

- How does Sears help or hinder you? How about its location? Too near? Too far? Does its size discourage or encourage people to locate here?

H. Merchant Attitudes/Practices

- Do you think local merchants are committed to making East Liberty a more dynamic business district?

- Are local merchants cooperative with each other? Willing to work together to attract business?

- Much common effort in promotions, events, advertising?

- Local merchants willing to join together in window display themes? Storefront decor? Active in keeping storefront neat and attractive? Stocking new types of merchandise?

- Have you found the East Liberty Chamber of Commerce helpful to your firm?

I. Neighborhood Appearance

- Any problems with municipal services or property owners in keeping district physically attractive?
 - Building repairs/painting
 - Police protection
 - Sidewalk/street cleaning
 - Street lighting
 - Street repair
 - Bus service
 - Zoning
 - Water supply/drainage/sewerage

J. Historical Traditions

- Are patrons generally aware of historical traditions of East Liberty? Any particular tradition or identifying feature that sets it apart from other districts?

K. Summary Questions

- All in all, what do you think could best be stressed to identify East Liberty to attract more businesses? What is most important to overcome?
- Do you have any specific suggestions on how municipal services could be changed to improve district business conditions?
- Any advice for Chamber of Commerce?
- Any advice for East Liberty Development, Inc. in its efforts to attract more businesses to locate here?

III. Location Orientations

Instructions: This section asks about the general importance of various locational factors to people in your line of business. It asks you to rate each aspect two ways:

- 1) Its importance in choosing a particular location in the Pittsburgh area (e.g., East Liberty vs other neighborhoods or suburban districts);
- 2) How satisfactory your present location is in regard to this factor.

Please rate each on a scale of 0 to 3, as follows:

- 3: Crucially important/superb
- 2: Important/Satisfactory
- 1: Unimportant/Inadequate
- 0: Irrelevant/Inapplicable

Any clarifying comments you care to add would be appreciated.

<u>LOCATIONAL FACTOR</u>	<u>Choice of Location</u>	<u>Rating for Present Site</u>	<u>Comments</u>
<u>A. Location in Business Network</u>			
1. Proximity to suppliers/materials	3 2 1 0	3 2 1 0	
2. Proximity to markets/customers	3 2 1 0	3 2 1 0	
3. Proximity to other firms with common or complementary needs	3 2 1 0	3 2 1 0	
4. Distance from direct competitors	3 2 1 0	3 2 1 0	
<u>B. Land and Utilities</u>			
5. Land/office rents or prices	3 2 1 0	3 2 1 0	
6. Energy supplies/costs	3 2 1 0	3 2 1 0	

C. <u>Location in Transport Network</u>	<u>Choice of Location</u>	<u>Rating for Present Site</u>	<u>Comments</u>
7. Parking spaces for customers	3 2 1 0	3 2 1 0	
8. Parking spaces for staff	3 2 1 0	3 2 1 0	
9. Proximity to customers' residences or offices	3 2 1 0	3 2 1 0	
10. Proximity to public transit	3 2 1 0	3 2 1 0	
11. Proximity to airport	3 2 1 0	3 2 1 0	
12. Proximity to river transit	3 2 1 0	3 2 1 0	
13. Proximity to rail network	3 2 1 0	3 2 1 0	
14. Proximity to highways	3 2 1 0	3 2 1 0	
D. <u>Financing and Counseling</u>			
15. Availability of risk capital	3 2 1 0	3 2 1 0	
16. Availability of long-term loans	3 2 1 0	3 2 1 0	
17. Availability of short-term loans	3 2 1 0	3 2 1 0	
18. Consulting services in management	3 2 1 0	3 2 1 0	
19. Consulting services on regulatory procedures	3 2 1 0	3 2 1 0	
E. <u>Labor</u>			
20. Availability of professional experts	3 2 1 0	3 2 1 0	
21. Availability of skilled technicians or production workers	3 2 1 0	3 2 1 0	
22. Availability of experienced sales or clerical personnel	3 2 1 0	3 2 1 0	
23. Availability of unskilled labor	3 2 1 0	3 2 1 0	
24. Local wage structure	3 2 1 0	3 2 1 0	
25. Vocational training programs	3 2 1 0	3 2 1 0	

<u>F. Academic Institutions</u>	<u>Choice of Location</u>	<u>Rating for Present Site</u>	<u>Comments</u>
26. Proximity to university (If unimportant or irrelevant, please skip 27-35)	3 2 1 0	3 2 1 0	
27. Degree programs for employees	3 2 1 0	3 2 1 0	
28. Part-time teaching opportunities for employees	3 2 1 0	3 2 1 0	
29. Faculty research activity/seminars	3 2 1 0	3 2 1 0	
30. Faculty consultants	3 2 1 0	3 2 1 0	
31. Access to laboratories	3 2 1 0	3 2 1 0	
32. Access to libraries & information systems	3 2 1 0	3 2 1 0	
33. Access to business counseling	3 2 1 0	3 2 1 0	
34. College graduates/recruiting	3 2 1 0	3 2 1 0	
35. Cultural activities	3 2 1 0	3 2 1 0	
<u>G. Government</u>			
36. Local taxes	3 2 1 0	3 2 1 0	
37. Zoning	3 2 1 0	3 2 1 0	
38. Building codes	3 2 1 0	3 2 1 0	
39. Police services	3 2 1 0	3 2 1 0	
40. Street cleaning/maintenance services	3 2 1 0	3 2 1 0	
41. Other services	3 2 1 0	3 2 1 0	
<u>H. Social and Natural Environment</u>			
42. Security/low crime rate	3 2 1 0	3 2 1 0	
43. Local attitude toward business	3 2 1 0	3 2 1 0	
44. Housing costs	3 2 1 0	3 2 1 0	
45. Schools for children	3 2 1 0	3 2 1 0	
46. Recreational and cultural amenities	3 2 1 0	3 2 1 0	

IV. Description of Business Questions for Real Estate Brokers, Property Owners, Financiers, University Consultants

A. Real Estate Brokers:

1. What is the scale of your business (sales per month, amount of sales).
2. In what geographic area do you do business? Where are your offices?
3. Do you specialize in any particular types of clients or real estate?

B. Financiers

1. What kinds of financing do you provide? (Start-up for new businesses, expansion to production phase, etc.)
2. Do you provide capital for new businesses without a track record?
3. Do you specialize in any particular types of business?
4. How do you get referrals?

C. Property Owners

1. Number of parcels owned/value?
2. Location of parcels; number in East Liberty?
3. Do you personally use (or own businesses located in) the East Liberty parcels?
4. Do you value the parcels mainly for
 - long-term investment yield
 - rental income/cash flow
 - tax adjustments
 - risk ventures

D. Business Advisors

1. What is the nature of the program you are involved with?

2. How many firms are involved with it?

E. Journalists

1. How frequently and for how long have you covered East Liberty?

2. What types of stories?

F. Business Owners

LOCATION

1. Is this place of business a:
 - Single-site operation
 - Headquarters for a multi-branch operation
 - Branch office
 - Subsidiary

2. Location of headquarters if different from above: _____

3. Location of other branches, if any: _____

4. What kind of business activities are carried out here?
 - Retail sales Professional Services Marketing
 - Production Research

5. Has this office ever been located elsewhere? Yes No
If yes, where? _____

6. How big is your site here?

Land area: _____ sq. ft.

Floor space: _____ sq. ft.

No. of floors: _____

Parking space: _____ sq. ft.

7. Is the property:

Owned in full On long-term lease

Mortgaged On short-term lease

8. How much do you pay for rent or mortgage? \$ _____

MARKETS

9. How would you describe the market segment you are aiming for? (For retail sales and personal services: age group, family status, income bracket, etc.; for other firms: type of business or institution).

10. Where are your major competitors located? _____

11. Where are most of your customers located:

East Liberty

Pittsburgh/Allegheny County

Southwestern Pennsylvania/Tri-state Area

Mid-Atlantic States

U.S./Canada

Other Countries

12. For retail sales and personal services: How do most customers come here (car, public transit, walk, etc.)? _____

For other firms: By what type(s) of transport do you ship your products to your customers? _____

13. What are your normal hours of business? _____

14. Have they changed in the past few years? _____

15. Where do you purchase most of your supplies? _____
16. By what type(s) of transport are they shipped to you? _____
17. Are you a member of the local Chamber of Commerce? _____
 If not, why not? _____
 Do you belong to any other trade or business associations? _____

LABOR FORCE

18. About how many people do you employ full-time? _____
 Part-time? _____
19. How many have the following skill levels:
 _____ Professional
 _____ Managerial/Administration
 _____ Technical/Skilled production
 _____ Sales
 _____ Clerical
 _____ Unskilled/General
 _____ Other (specify)
20. What types of skills are critical to your operations? _____

21. What percent are:
 _____ Black _____ Women _____ Over 50 years old?
22. What percent are hired from _____ East Liberty, _____ Pittsburgh/Allegheny Co.,
 _____ Elsewhere in Tri-State region, _____ Outside the region
23. Do the people at different skill levels tend to come from different geographic areas? What is the pattern? _____

24. What is the size of your payroll? _____

FINANCING

25. What percent of your operating costs go to:
_____supplies/inventory _____payroll _____maintenance
_____rent/mortgage
26. Has your location contributed to any difficulties in obtaining financing during the past few years? How?
27. (For new firms) How would you assess the availability of start-up capital in the Pittsburgh area?

FUTURE LOCATION PLANS

28. Is your site adequate for your operations now?
If not, why not? _____
29. In the next few years, do you foresee closing, moving, expanding here, or opening a new branch?
Which and why? How soon?
30. (If moving or opening a new branch) Where do you think you will choose your new site? Why?

THANK YOU VERY MUCH.