2016 Downtown Pittsburgh Resident Survey

Overview and Findings

PITTSBURGH DOWNTOWN PARTNERSHIP

The 2016 Downtown Pittsburgh Resident Survey was supported by:

MILLCRAFT
REAL ESTATE SERVICES

METHODOLOGY

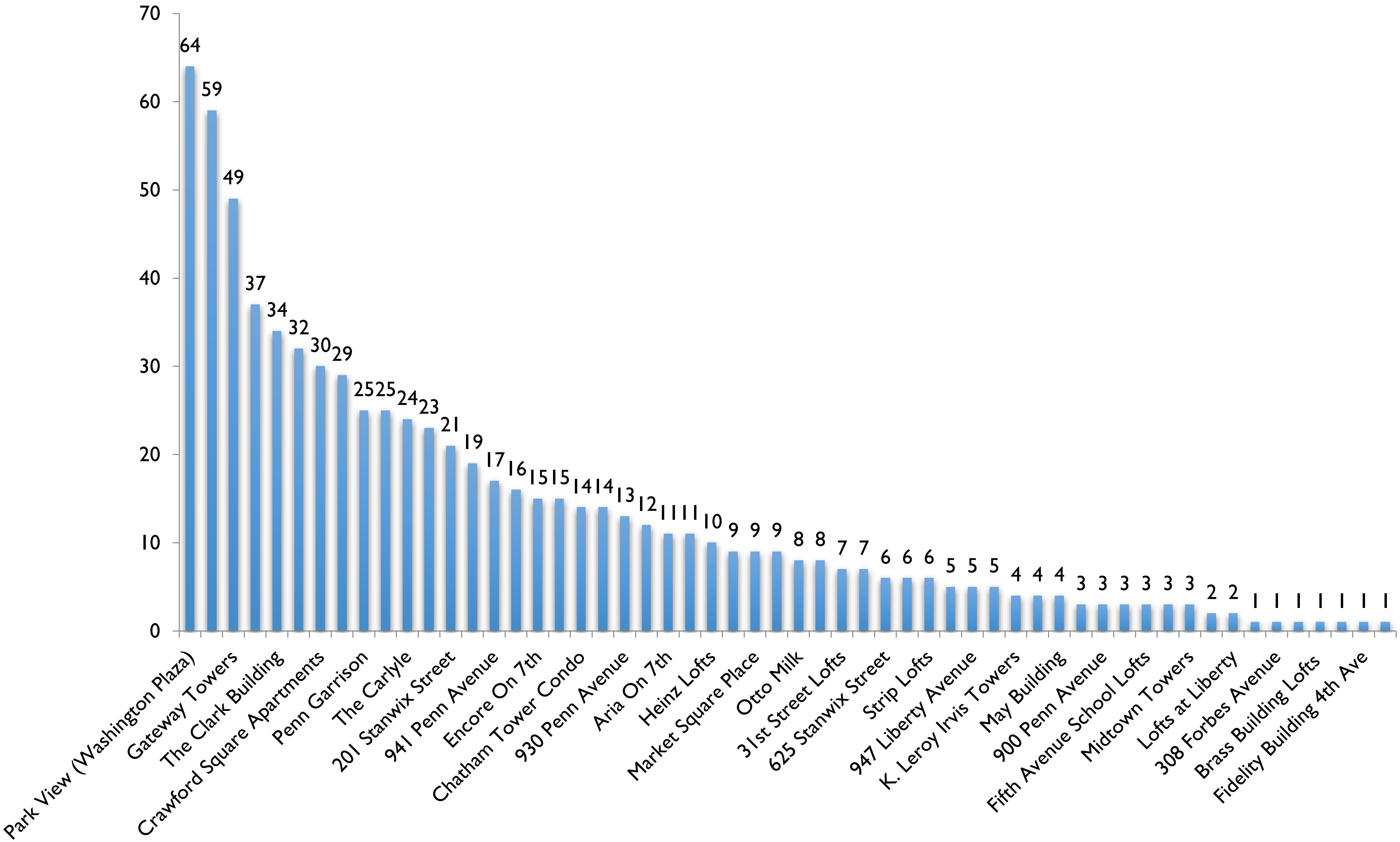
Survey Methodology

2016 Resident Survey
Online survey open from 1/6/2016 through 1/29/2016
Distributed with assistance of property managers via email and direct postcards to all units in multi-family properties
754 surveys collected representing 56 properties in Greater Downtown
Incentive: Restaurant gift card raffle (four gift cards distributed)

2012 Resident Survey
Online and hard copy survey open from 11/6/2012 through 12/7/2012
Distributed with assistance of property managers via email and direct postcards to all units in multi-family properties
571 Surveys collected representing 31 properties in Greater Downtown
Incentive: Restaurant gift card raffle (two gift cards distributed)

KEY DEMOGRAPHIC FINDINGS OF DOWNTOWN RESIDENT SURVEY

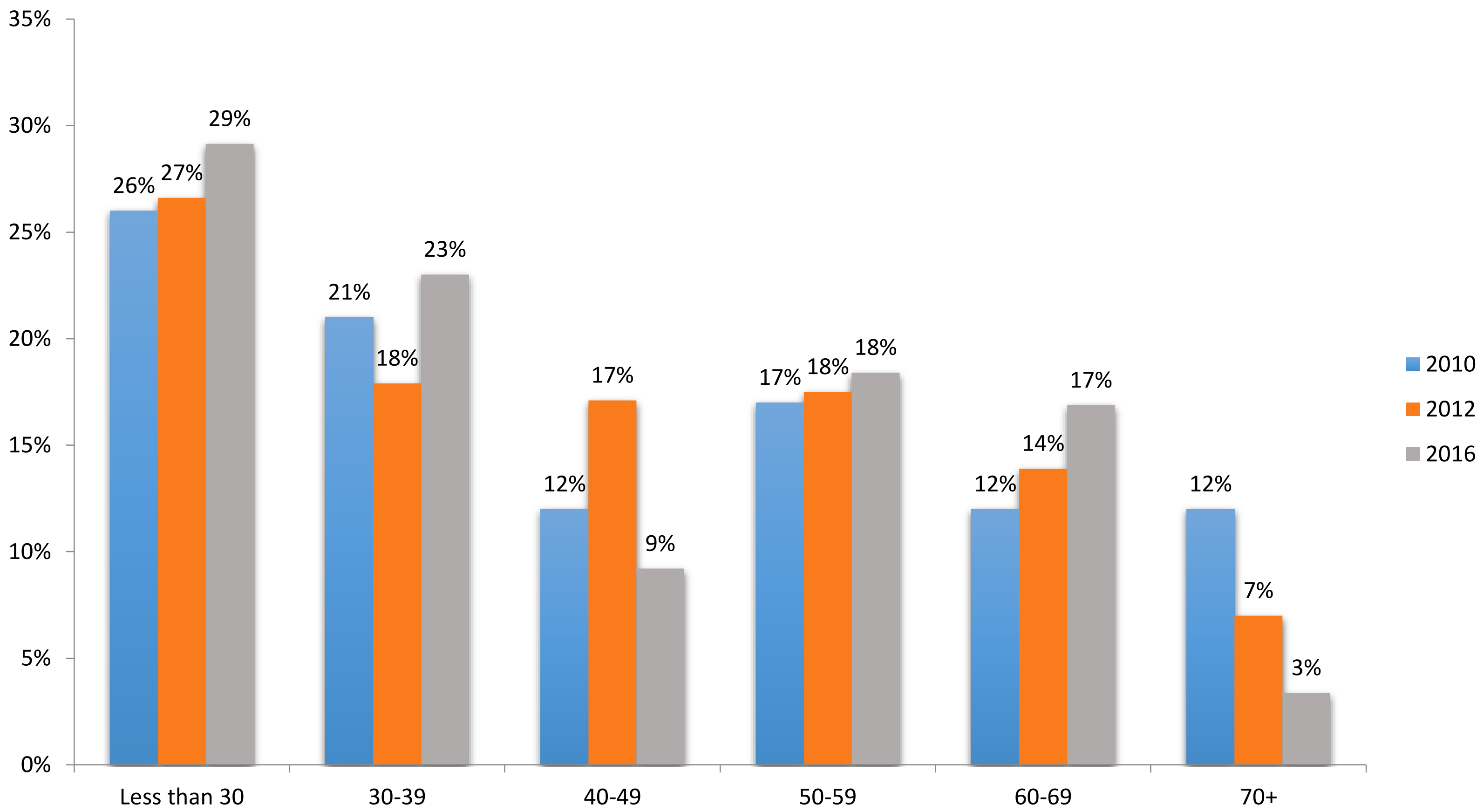
Resident Responses by Building



Number of respondents = N, N = 750

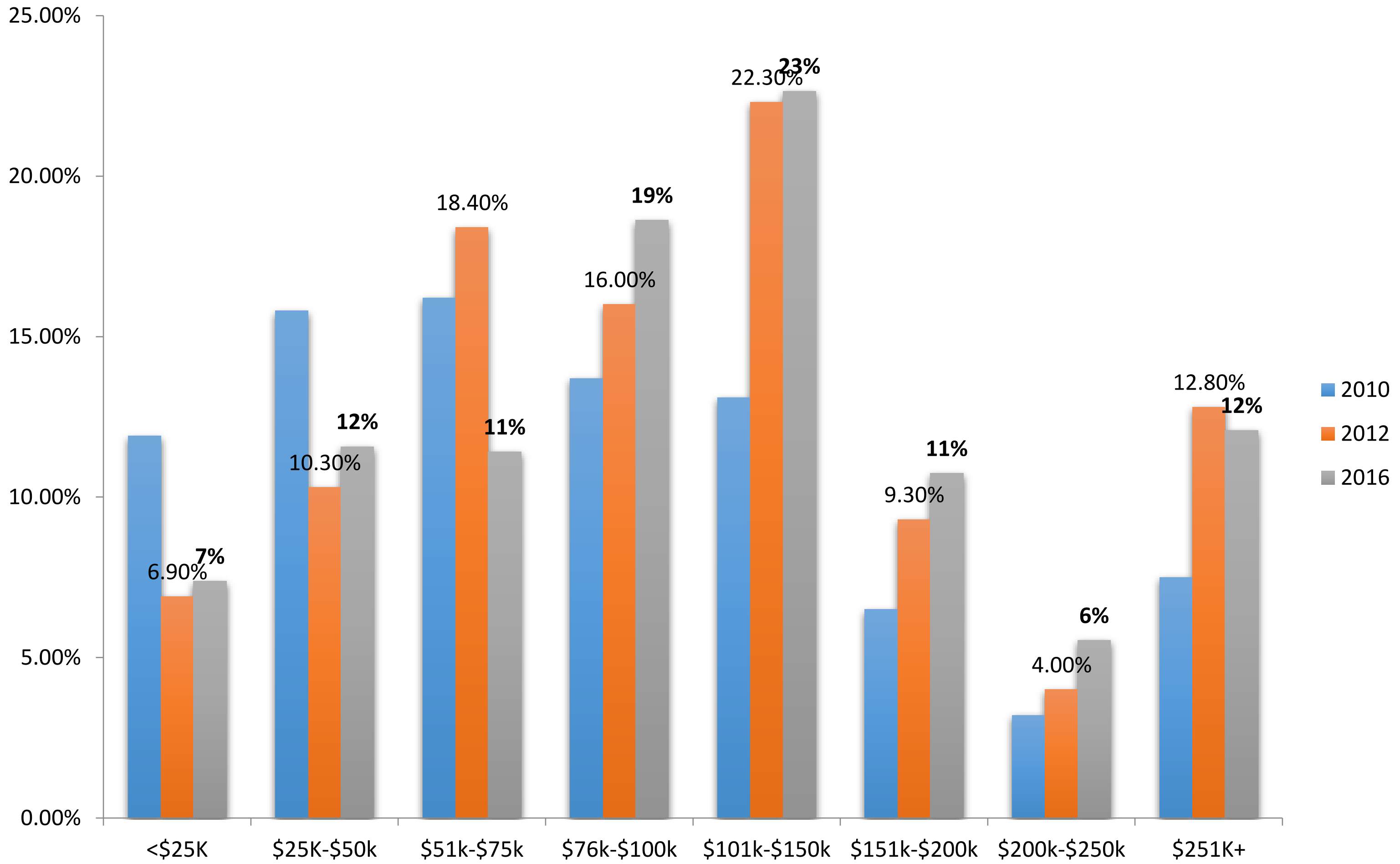
Age of Residents

There was a significant drop in the 40 – 49 ages, but an equally significant increase in residents 39 and younger.



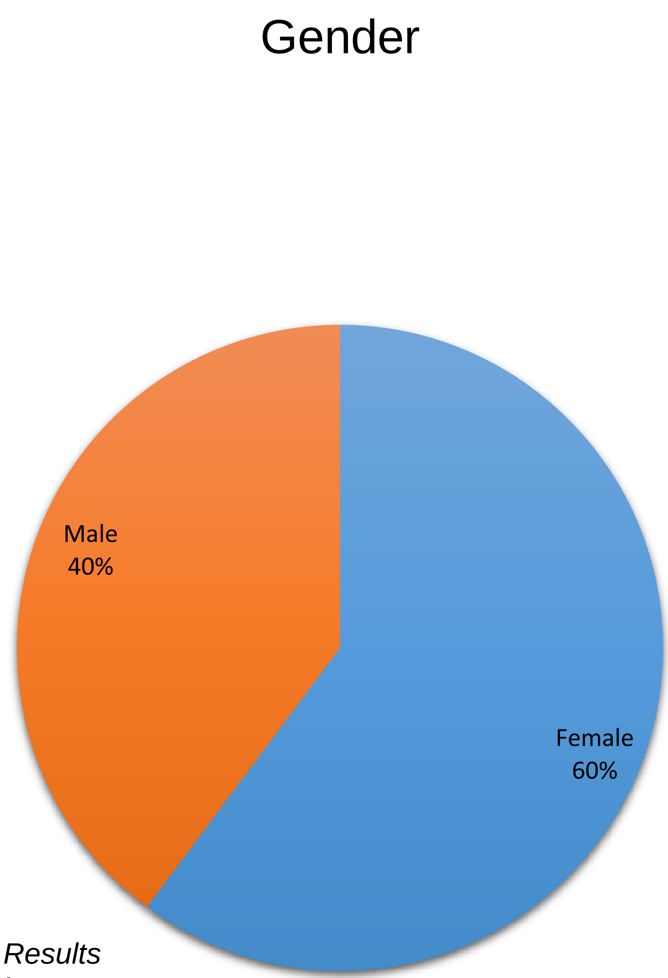
N = 326

Total Annual Household Income



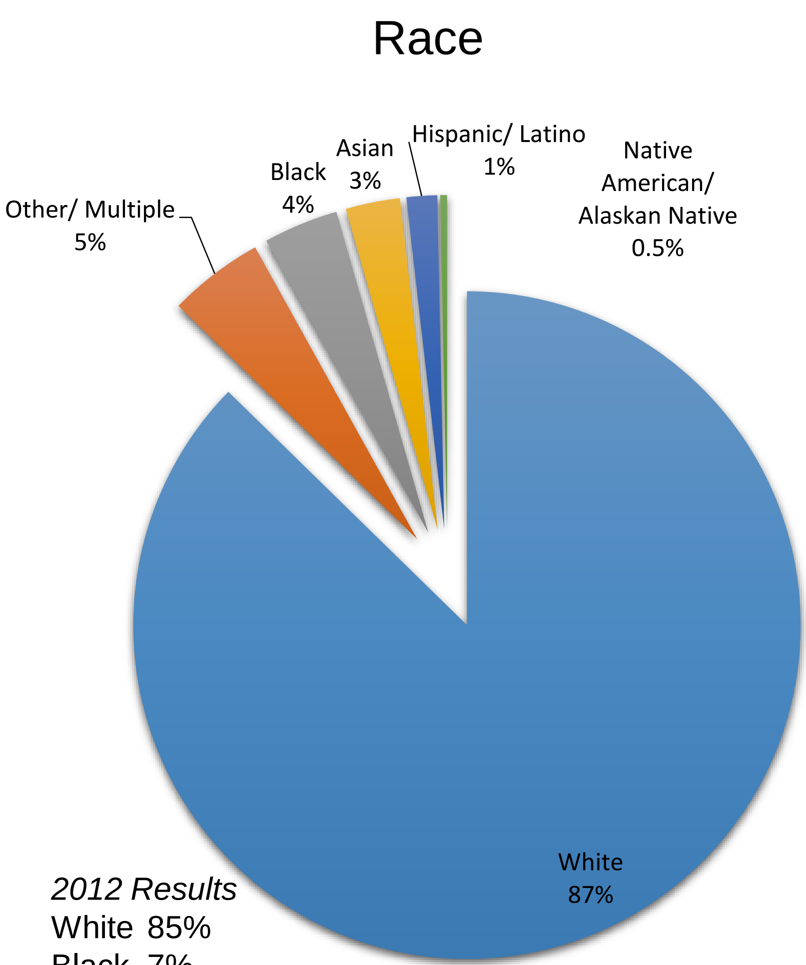
2016 N = 596

Gender and Race of Residents



2012 Results
Femal 53%
Males 47%

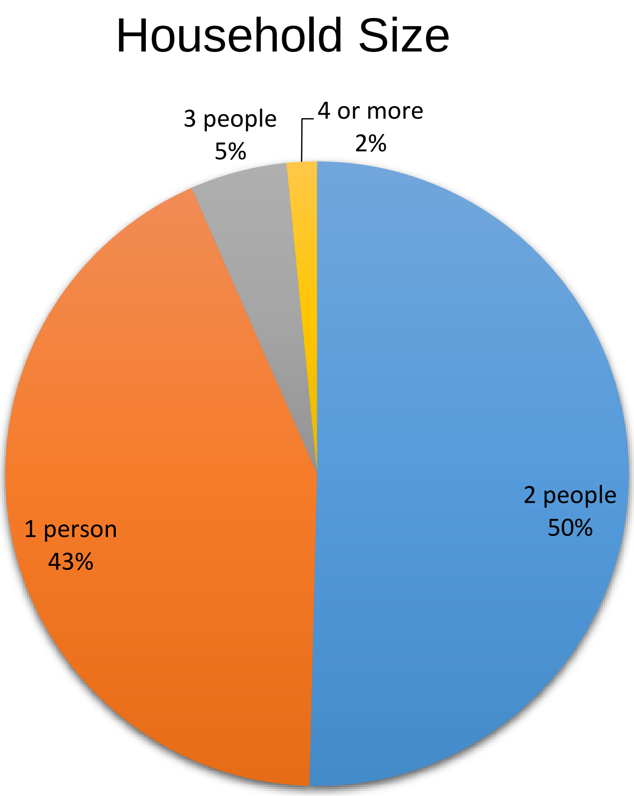
N =
633

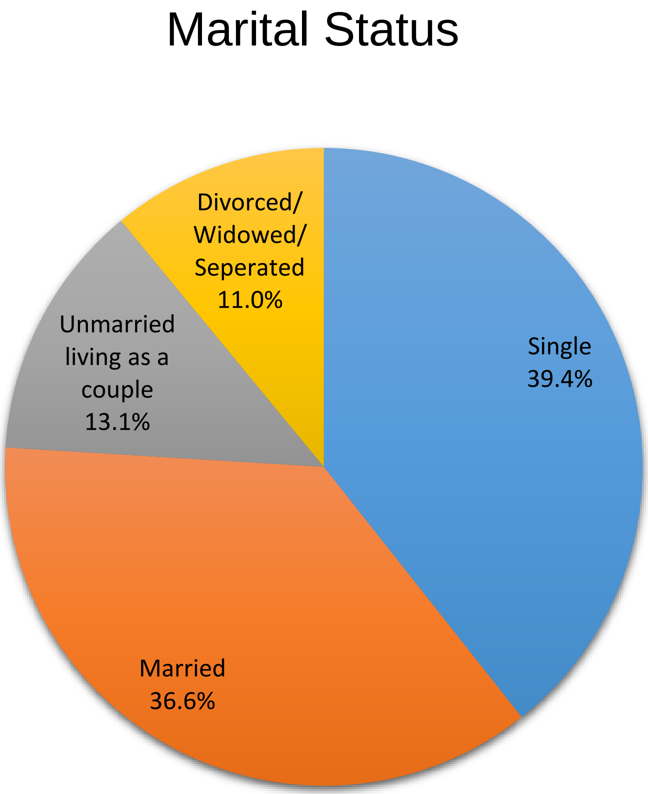


2012 Results
White 85%
Black 7%
Asian 6%
Other 0%

N =
607

Household Size and Marital Status of Residents





- Average Household Size = 1.65 people (1.6 in 2012)
- 1 person Households are down from 49% in 2012
- 2 person Households are up 5% since 2012
- 11.2% of Households contain a resident under the age of 18

- Divorced residents have declined 2% , while married residents increased by 2% since 2012.
- Single residents are the largest decrease at 4% more than 2012, but living as a couple increased the most at 4%.

N = 637

N = 620

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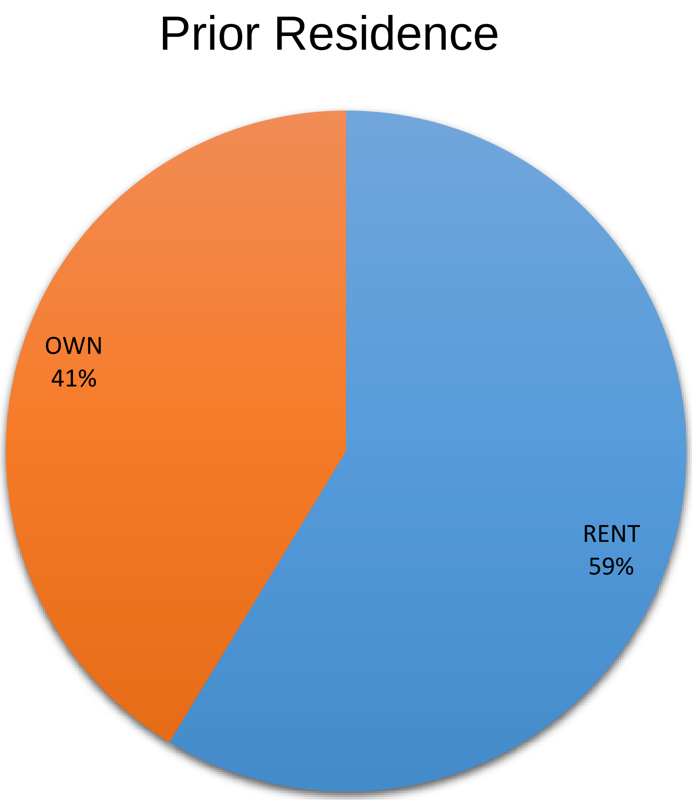
Pet Ownership

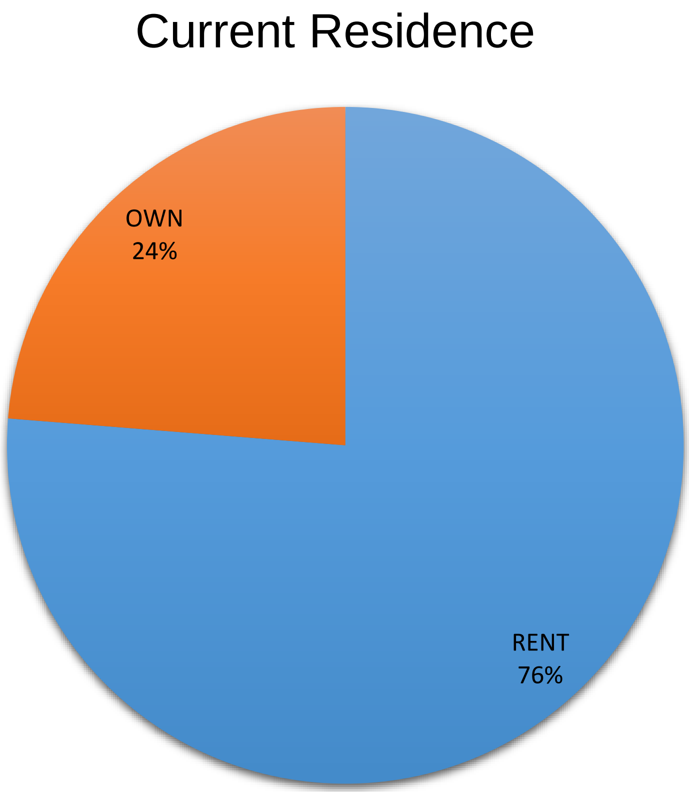
Type of Pet	2008	2010	2012	2016
No pets	74%	76%	64%	62%
Own Dogs	13%	11%	22%	22%
Own Cats	14%	12%	14%	16%
Own Other Pets	2%	1%	0%	1%
Average # of Dogs	1	1.1	1.1	1.1
Average # of Cats	1.5	1.4	1.6	1.4

N = 586

Ownership Status



2012 Results
Rent 54.9%
Own 45.10%



2012 Results
Rent 76.9%
Own 23.1%

Q5. Did you rent or own your prior residence?

N = 748

Q3. Do you rent or own your current residence?

N = 750

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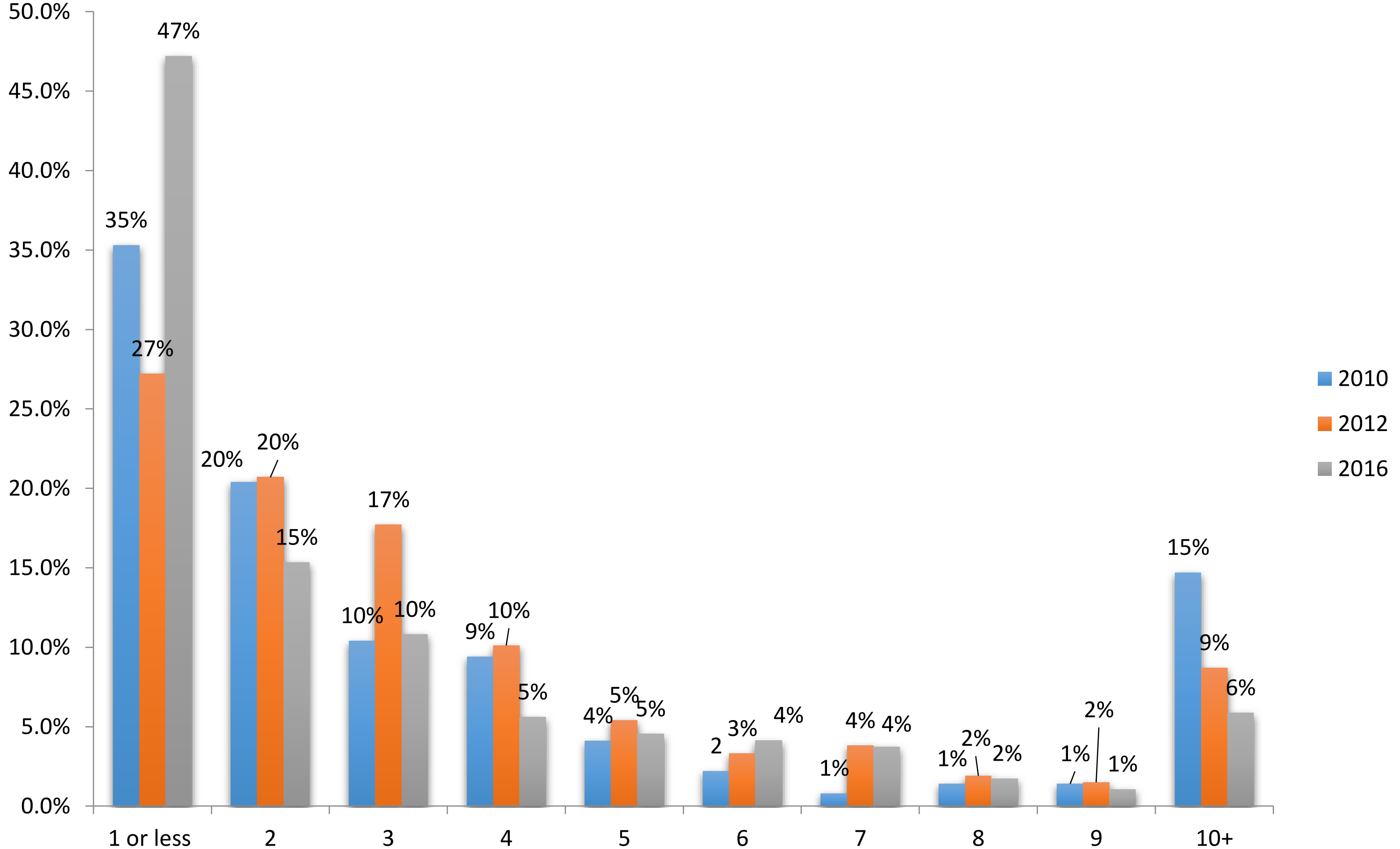
Tenure at Downtown Residence

Average Number of Years Living at Residence: 2016 = 2.67 2012 = 3.5 2010 = 4.4



Q2. How long have you lived at your current residence?

2016 N = 704

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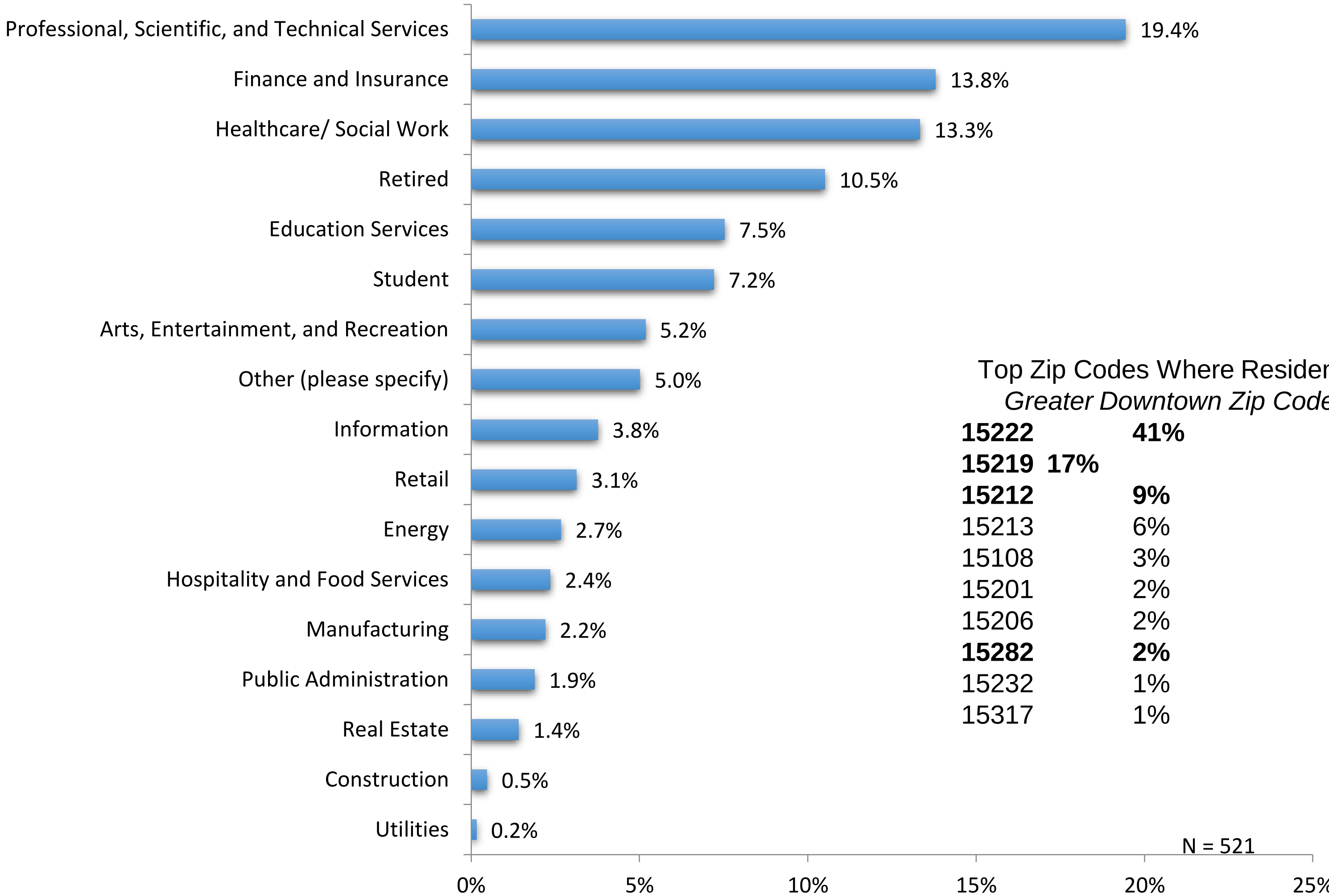
Resident Professions



Top Zip Codes Where Residents Work

*Greater Downtown Zip Codes in **Bold***

15222	**41%**
15219	**17%**
15212	**9%**
15213	6%
15108	3%
15201	2%
15206	2%
15282	**2%**
15232	1%
15317	1%

N = 521

Q49. In what industry are you employed?

Industries classified using the United States Census Bureau 2012 North American Industry Classification System

N = 638

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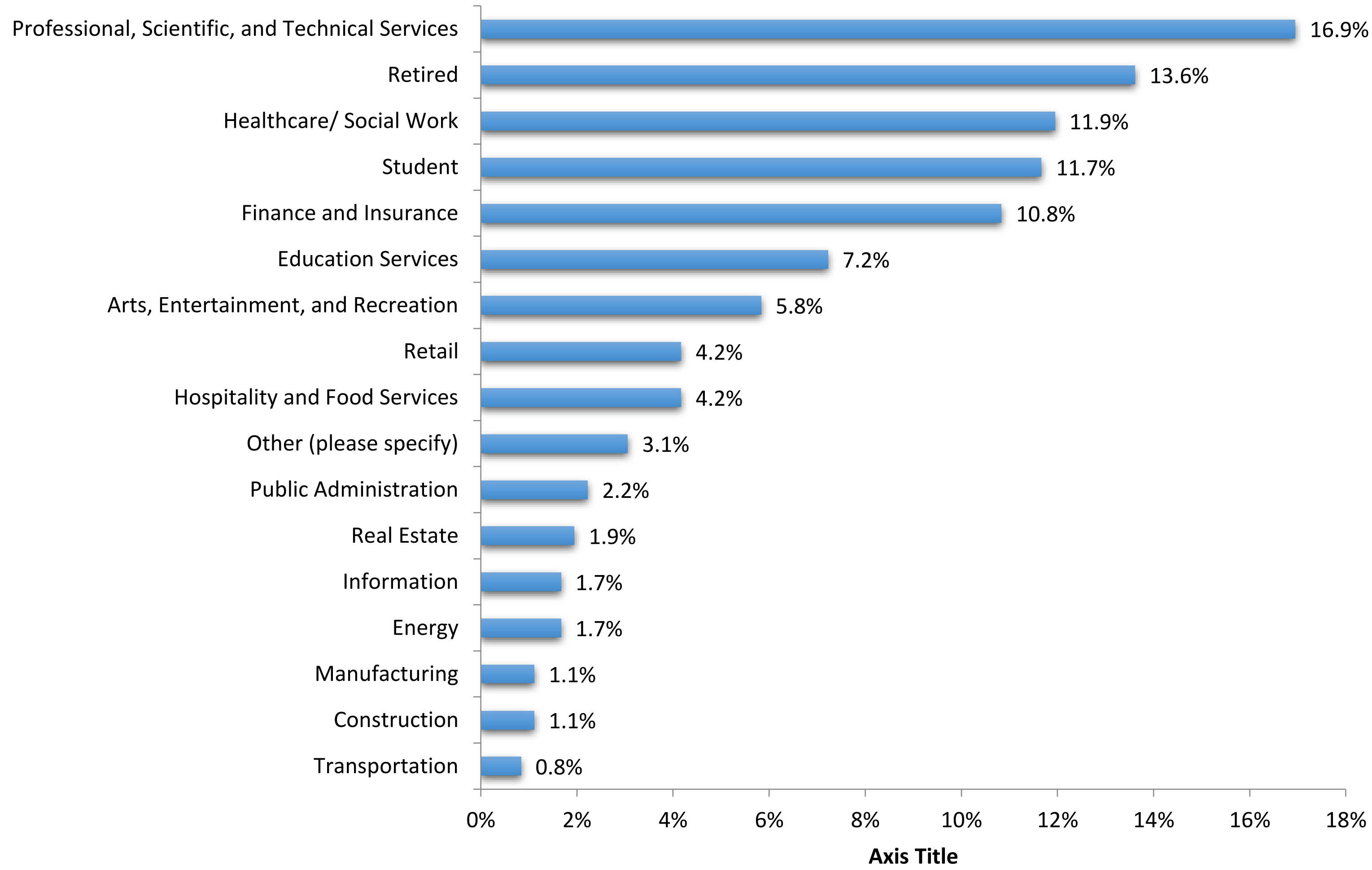
Profession of other Residents



Q51. In what industry do other adults in your household work?

Industries classified using the United States Census Bureau 2012 North American Industry Classification System

N = 360

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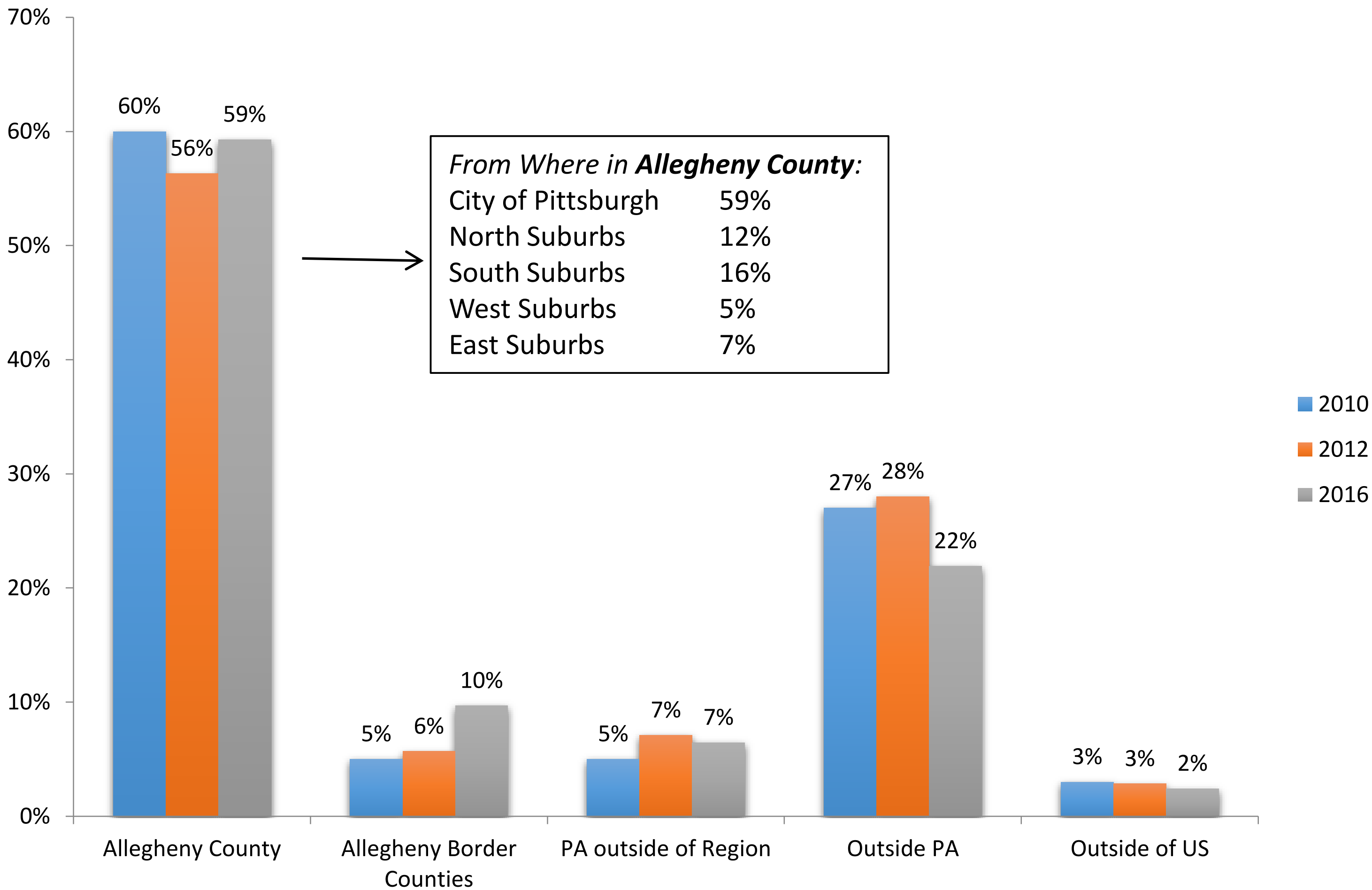
MOVING DOWNTOWN AND LIVING SATISTFACTION

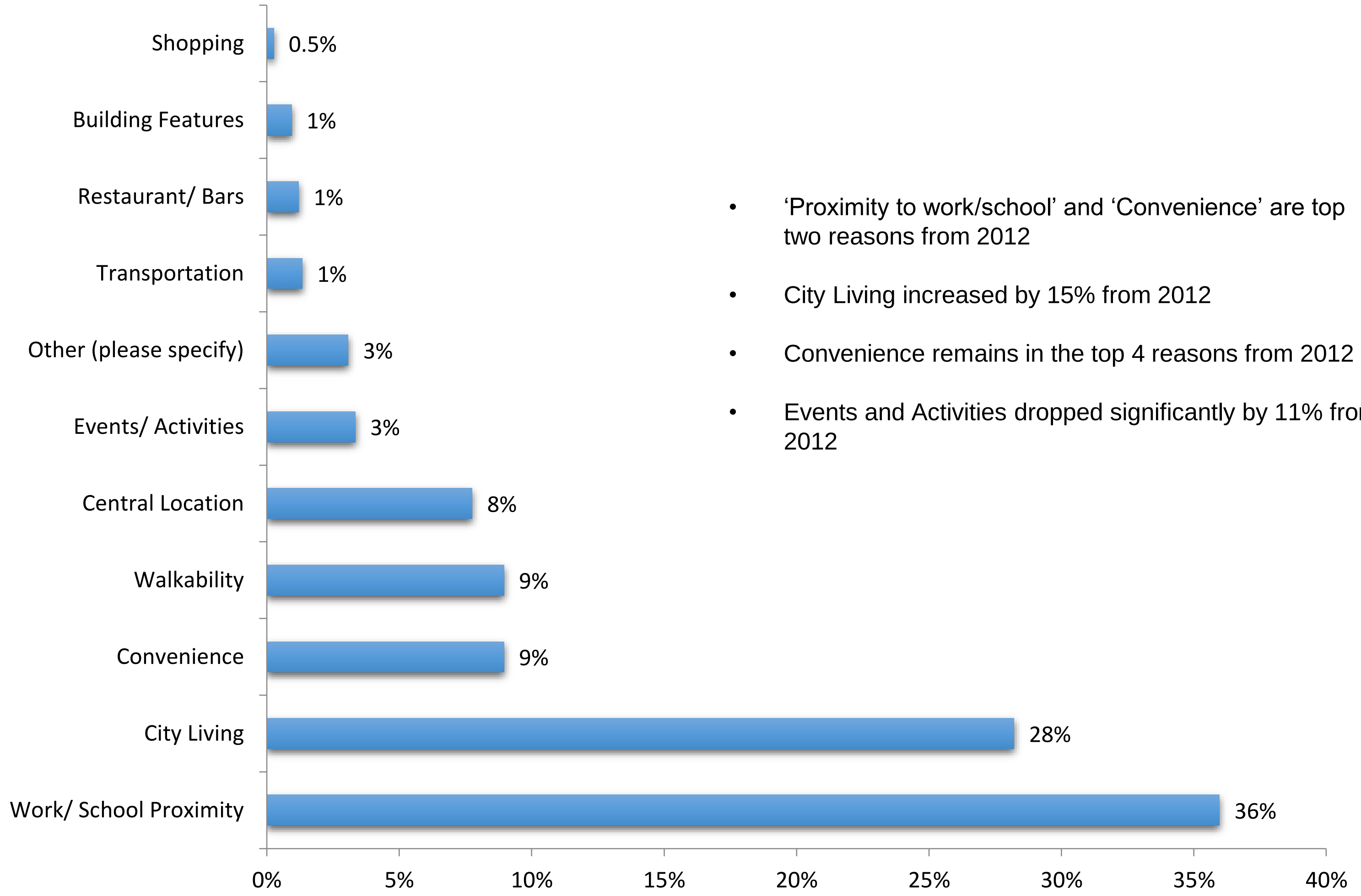
Prior Residence



Q4. Where did you last live prior to moving to your current Downtown residence?

N = 744

Reasons for Moving Downtown



- ‘Proximity to work/school’ and ‘Convenience’ are top two reasons from 2012
- City Living increased by 15% from 2012
- Convenience remains in the top 4 reasons from 2012
- Events and Activities dropped significantly by 11% from 2012

Q6. What was the primary reason you chose to live Downtown?

N = 748

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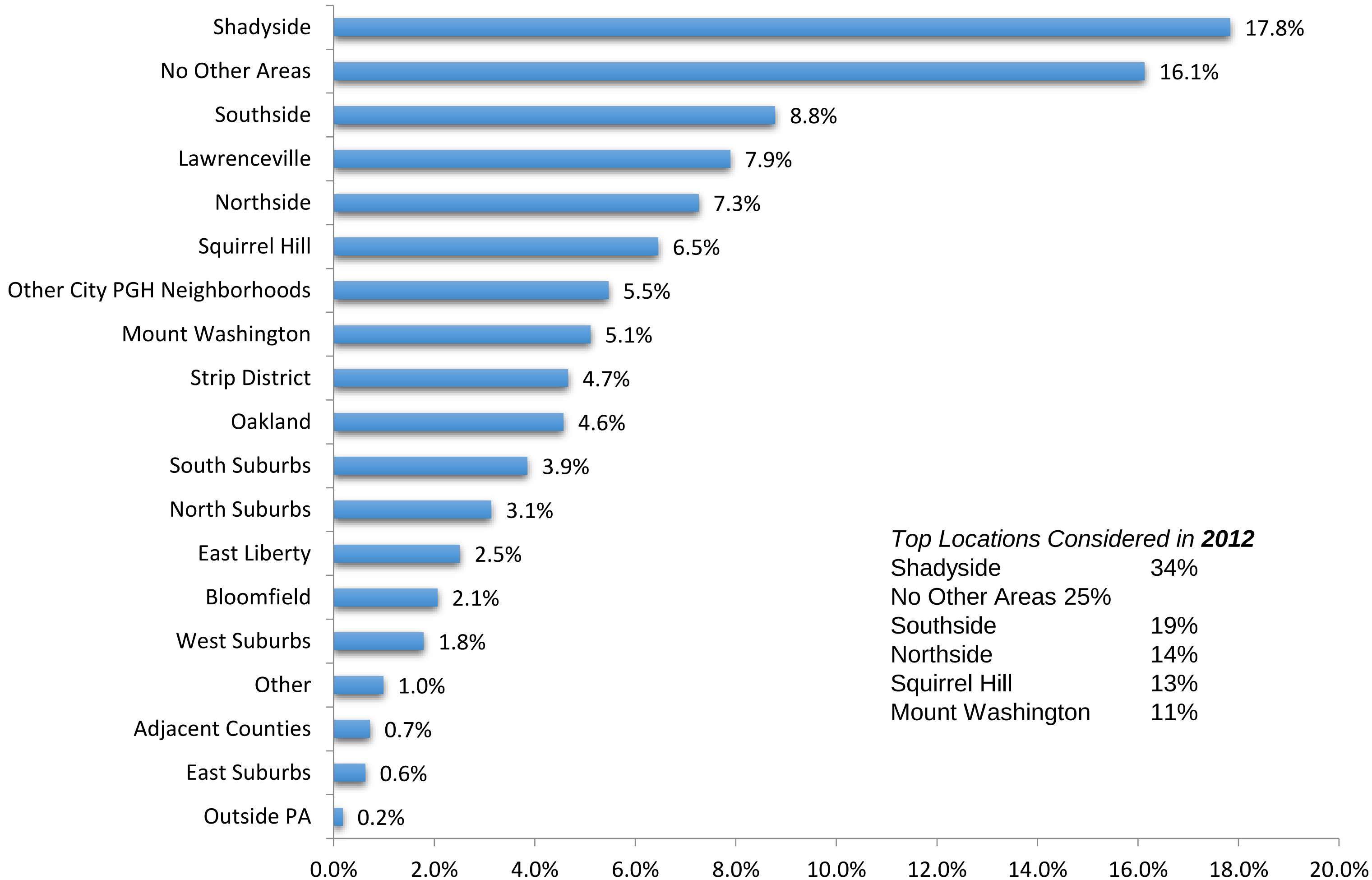
Other Locations Considered in Housing Search



*Top Locations Considered in **2012***

Shadyside	34%
No Other Areas	25%
Southside	19%
Northside	14%
Squirrel Hill	13%
Mount Washington	11%

Q7. Prior to moving Downtown, what other communities/neighborhoods were included in your housing search?

N = 619

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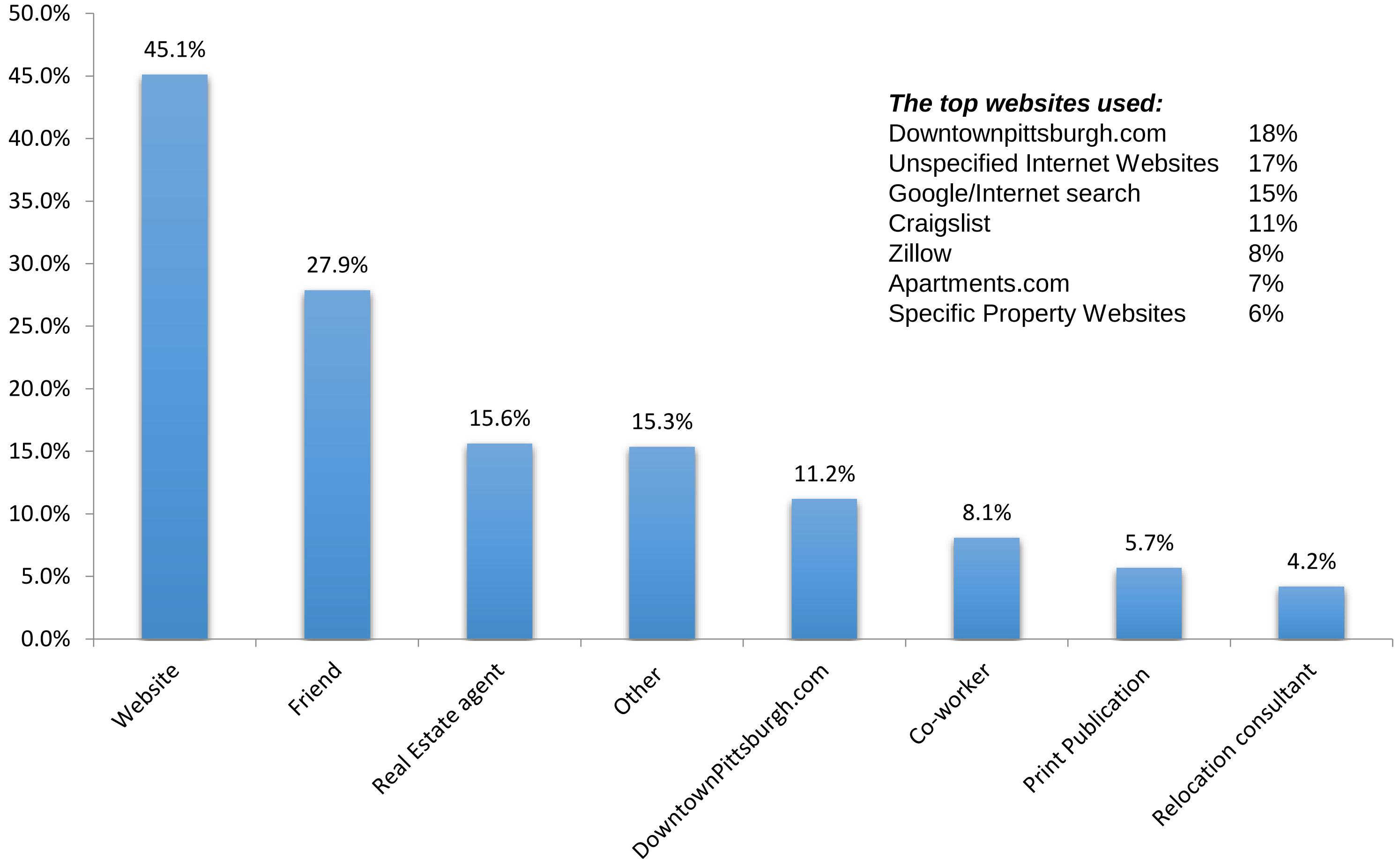
Resources Used in Housing Search



The top websites used:

Downtownpittsburgh.com	18%
Unspecified Internet Websites	17%
Google/Internet search	15%
Craigslist	11%
Zillow	8%
Apartments.com	7%
Specific Property Websites	6%

Q8. Which resources did you use to find your current Downtown property/building?

N = 743

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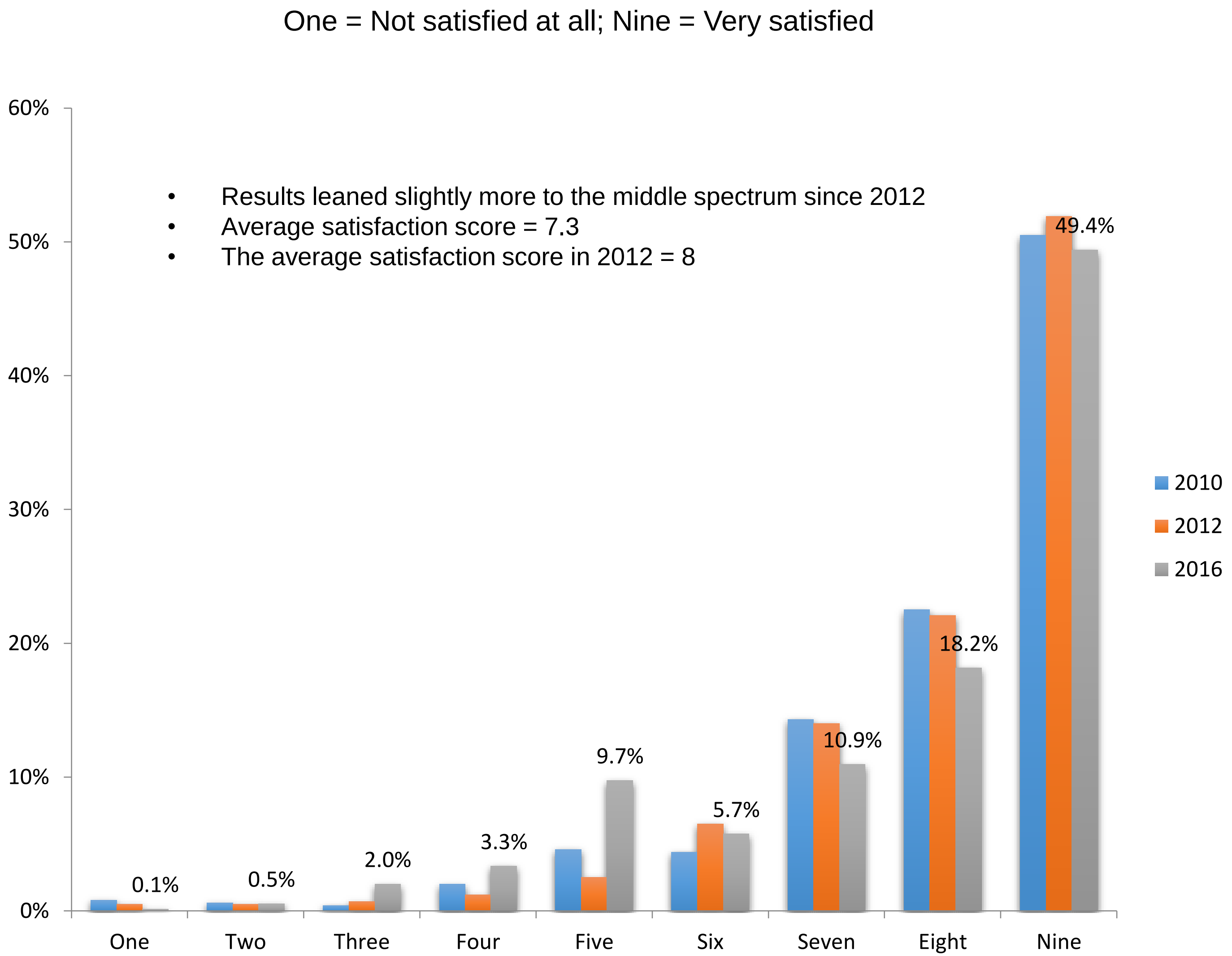
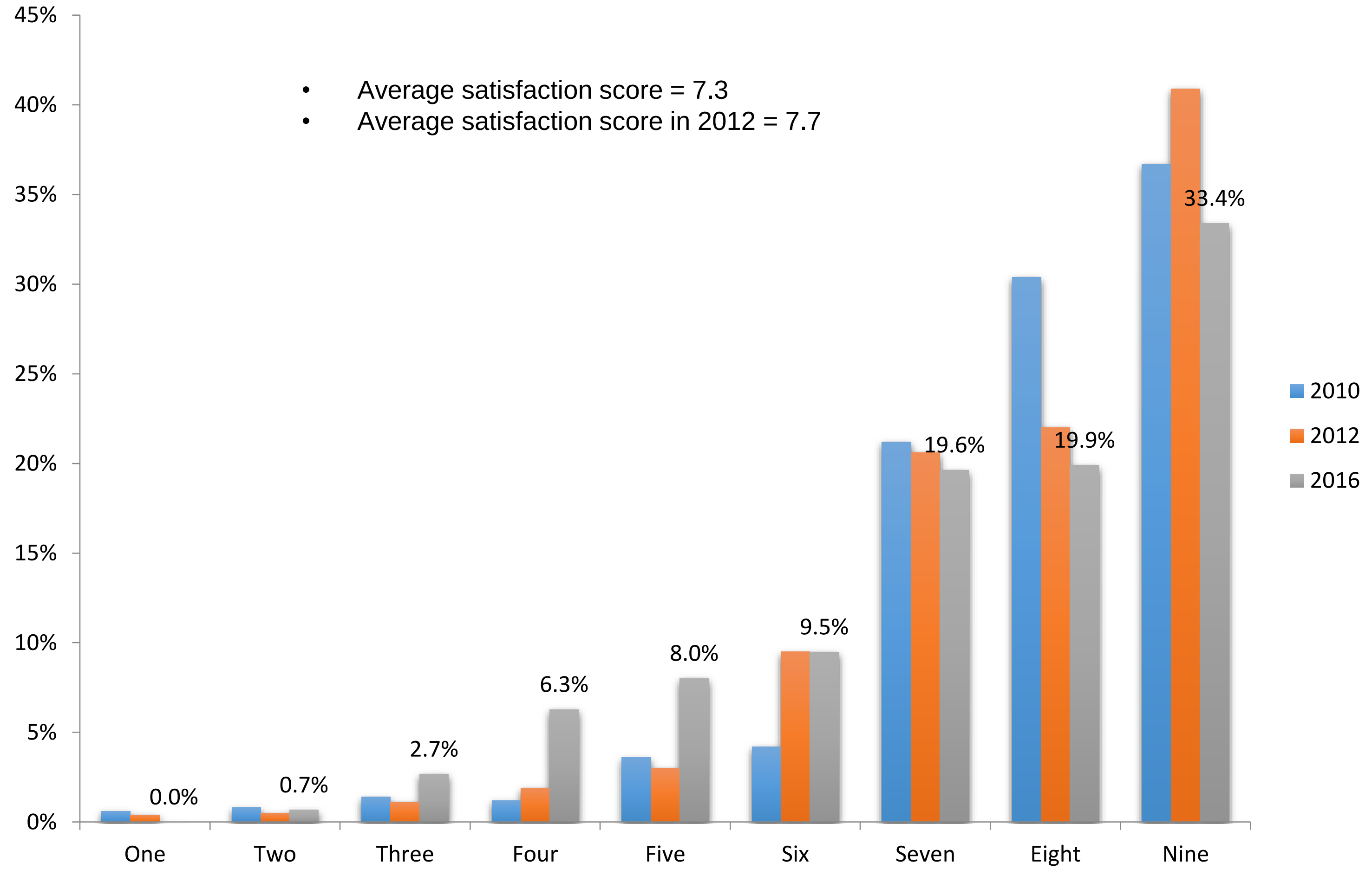
Satisfaction with Decision to Live Downtown



Q10. How satisfied are you with your decision to live in the Downtown neighborhood?

N = 749

Satisfaction with Downtown Building/ Property



Q9. How satisfied are you with your property/building choice?

N = 749

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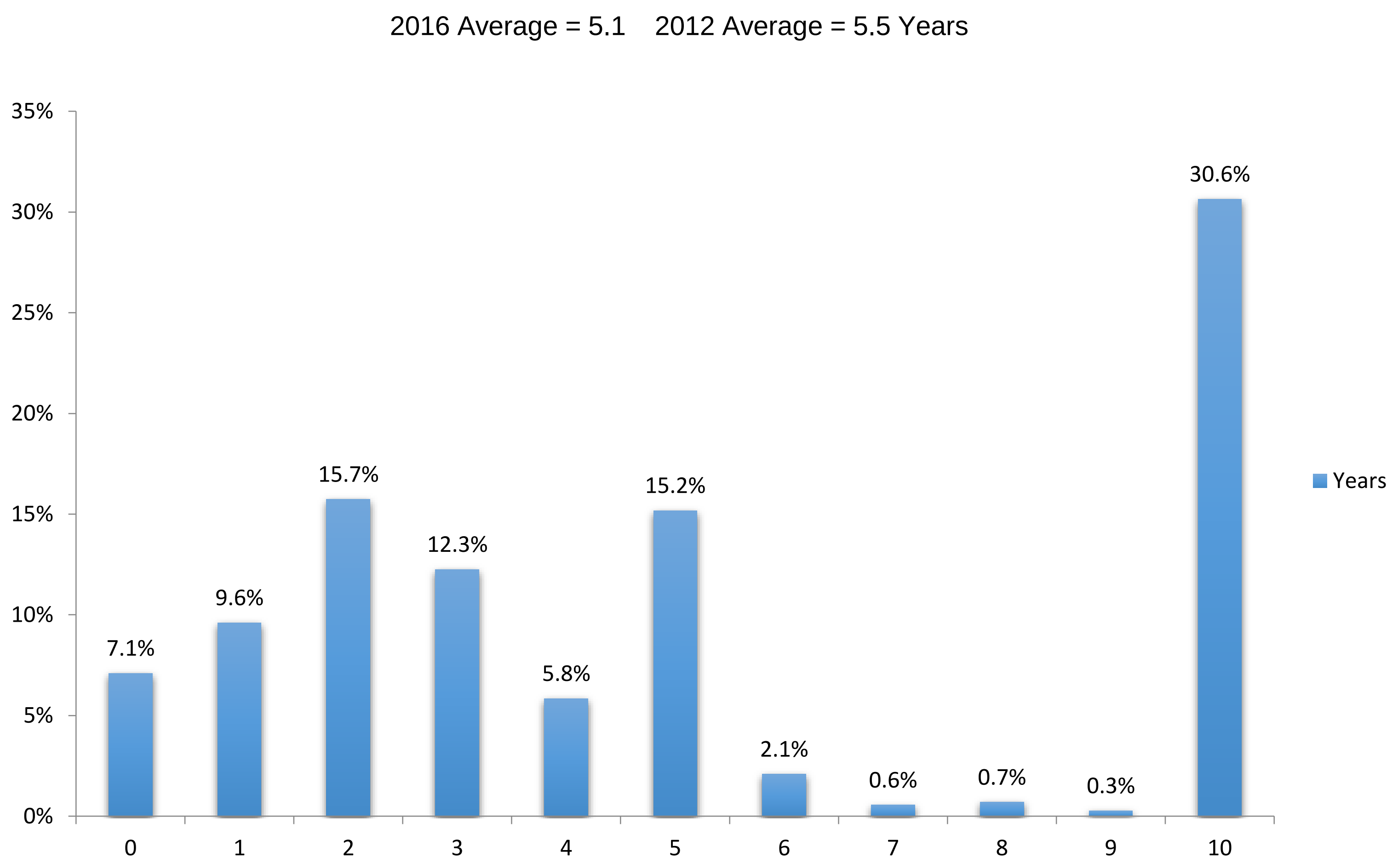
Years Residents Anticipate Living Downtown



Q11. How long do you anticipate living Downtown?

N = 718

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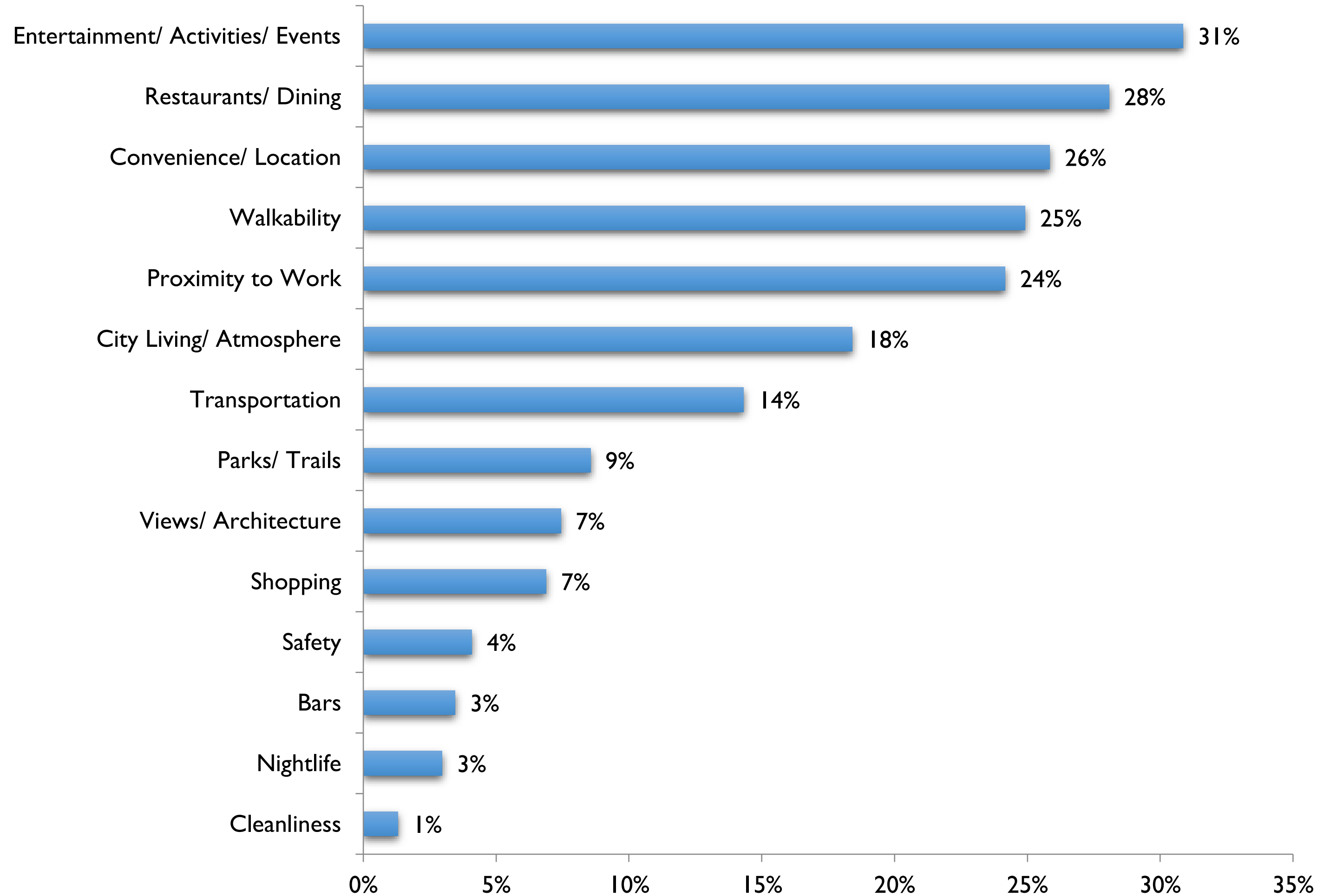
Positive Factors of "Downtown Living"



Answers less than one percent have been omitted from this list

Q15. Which aspects of Downtown living have the greatest overall impact on your quality of life as a Downtown resident?

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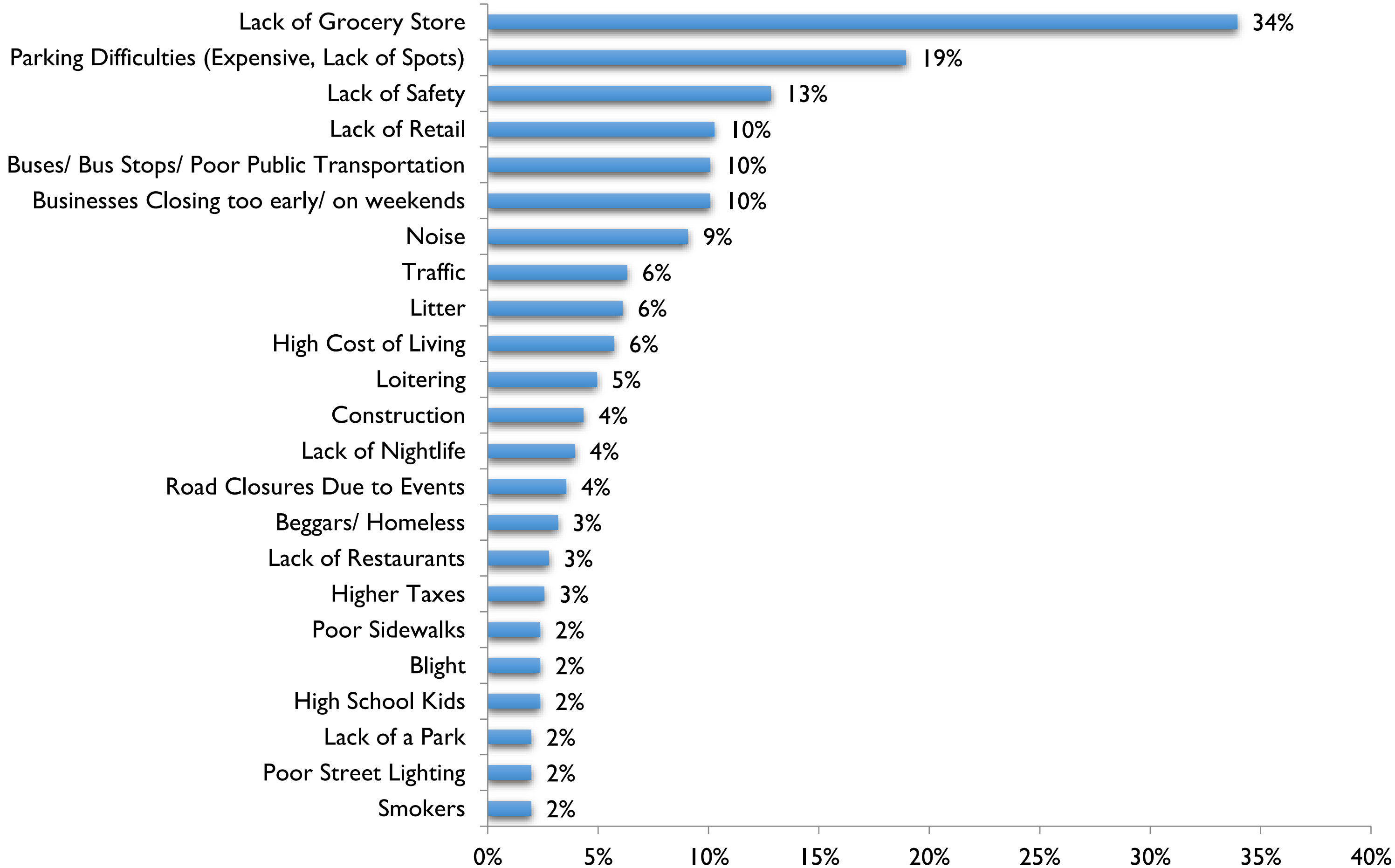
Negative Factors of "Downtown Living"



Answers with less than two percent were omitted from this list

Q15. Which aspects of Downtown living have the greatest overall impact on your quality of life as a Downtown resident?

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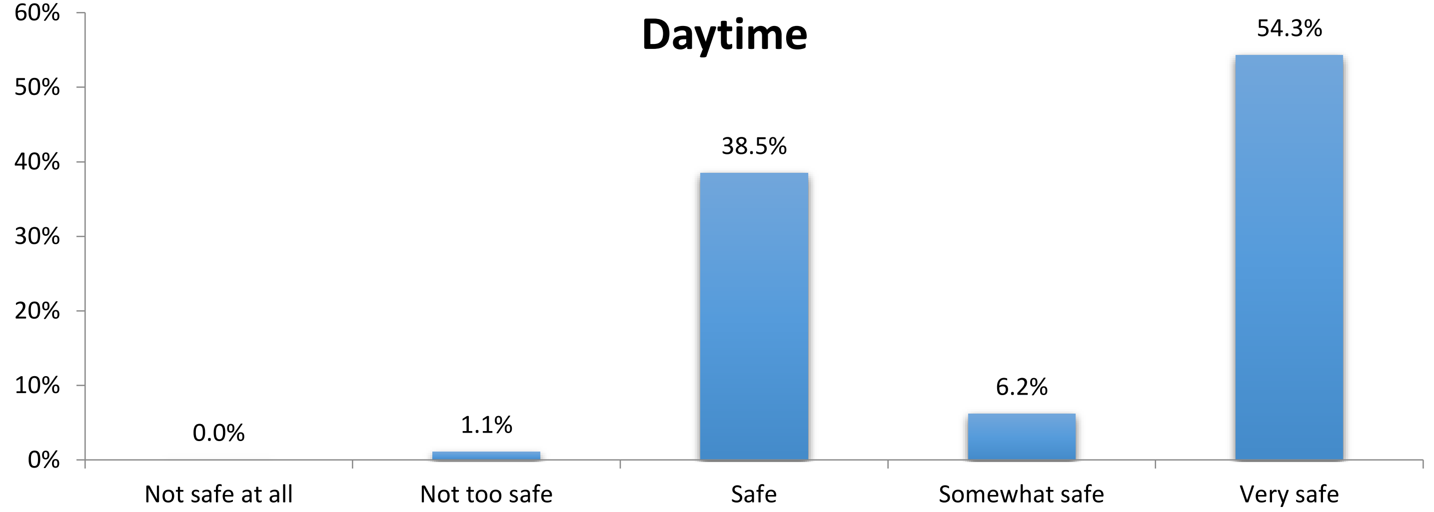
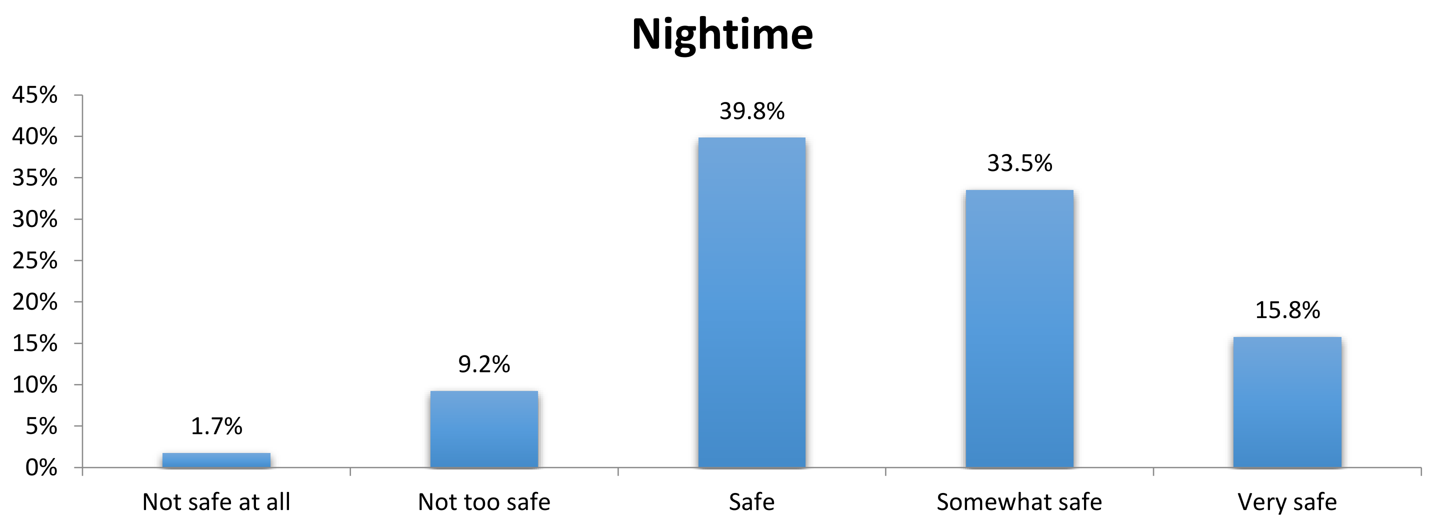
Safety Perceptions





Q12. How safe do you feel in Downtown during the day?

N = 746

Q13. How safe do you feel in Downtown at night?

N = 749

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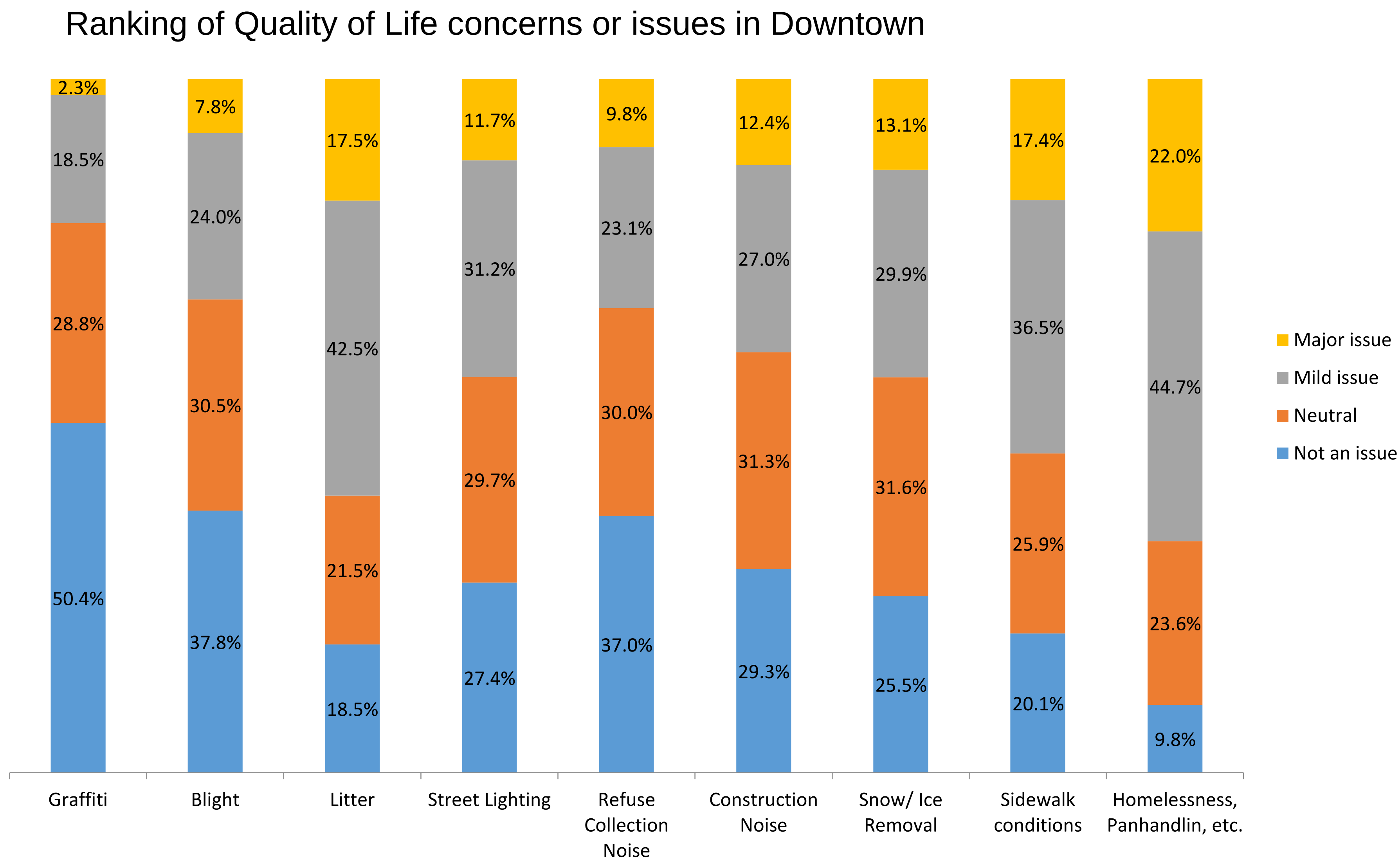
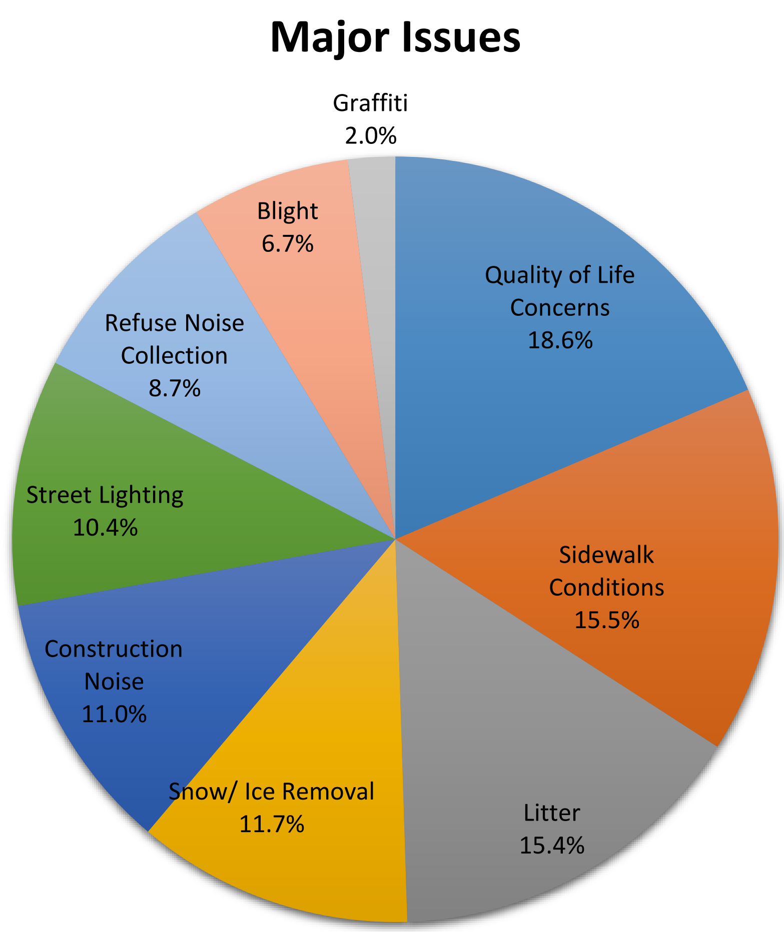
Resident Concerns



Q14. Which of the following concerns do you feel are issues in Downtown?

N = 709

Resident Concerns (cont.)



Top "Other Concerns" Listed

Grocery	9.5%
Buses and stops	9.0%
Poor Retail	7.5%
Noise Issues	7.0%
Parking	6.0%
Crime/ Safety	6.0%
Traffic	5.0%

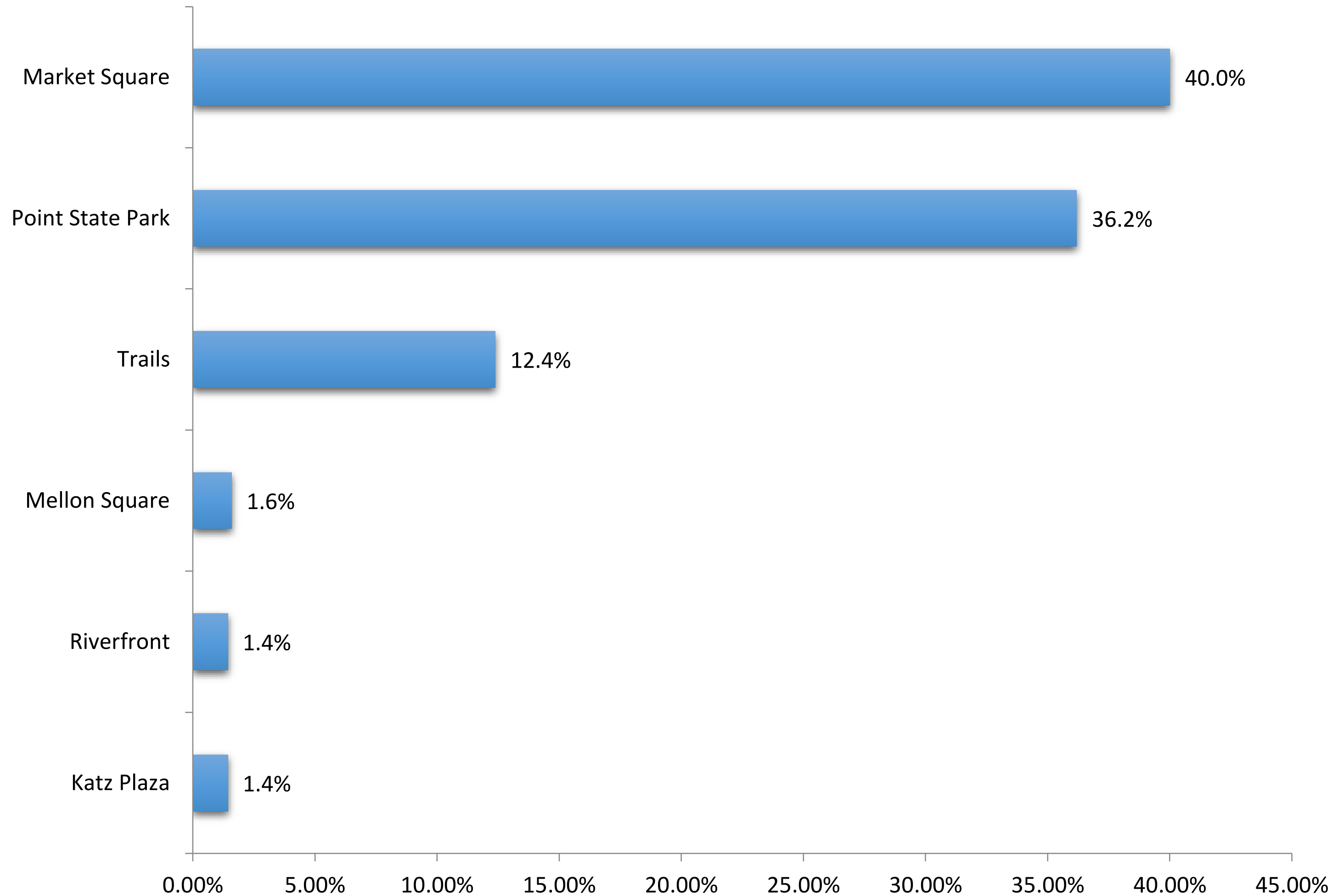
Q14. Which of the following concerns do you feel are issues in Downtown?

N = 709

DOWNTOWN PUBLIC SPACES AND AMENITIES

PITTSBURGH DOWNTOWN PARTNERSHIP

Favorite Public Space Downtown



Q21. What is your favorite public spaces in Downtown and why?

N = 630

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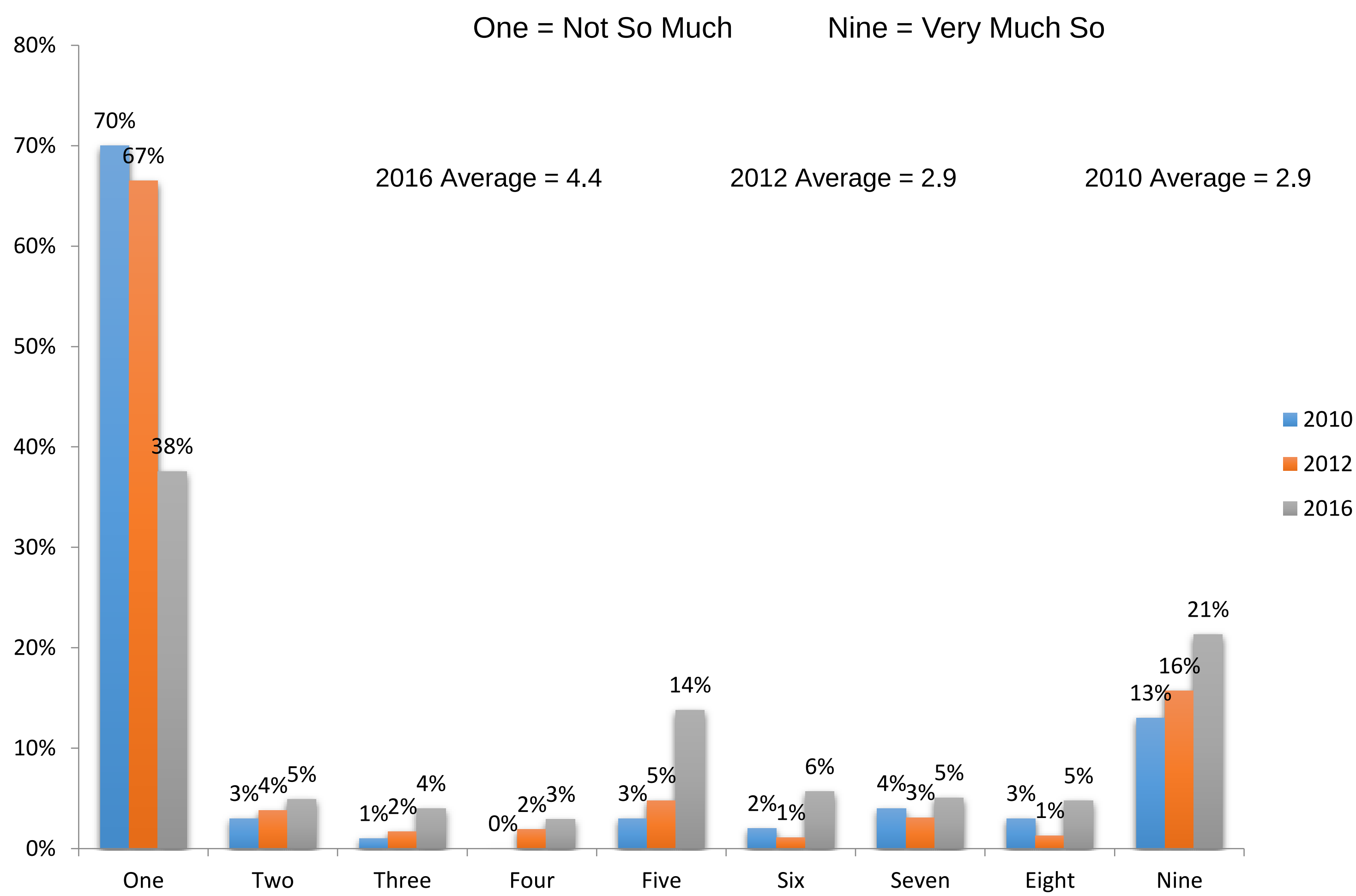
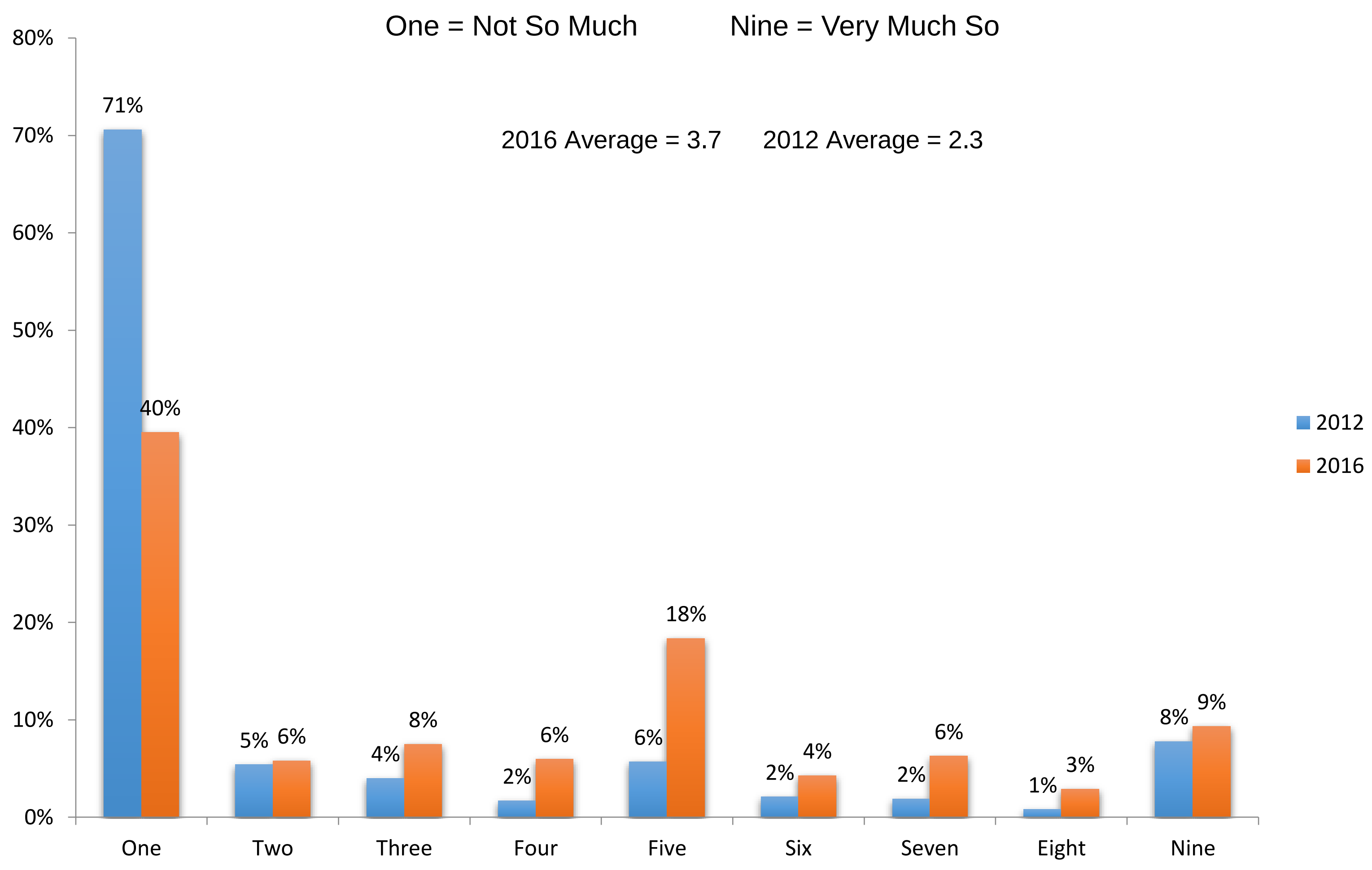
Likelihood to enjoy a Dog Park



Q23. If a small off-leash dog park was established in the Golden Triangle, how likely would you be to use it?

N = 652

Likelihood to enjoy having a Playground



Q24. If a small playground was established in the Golden Triangle, how likely would you be to use it?

N = 653

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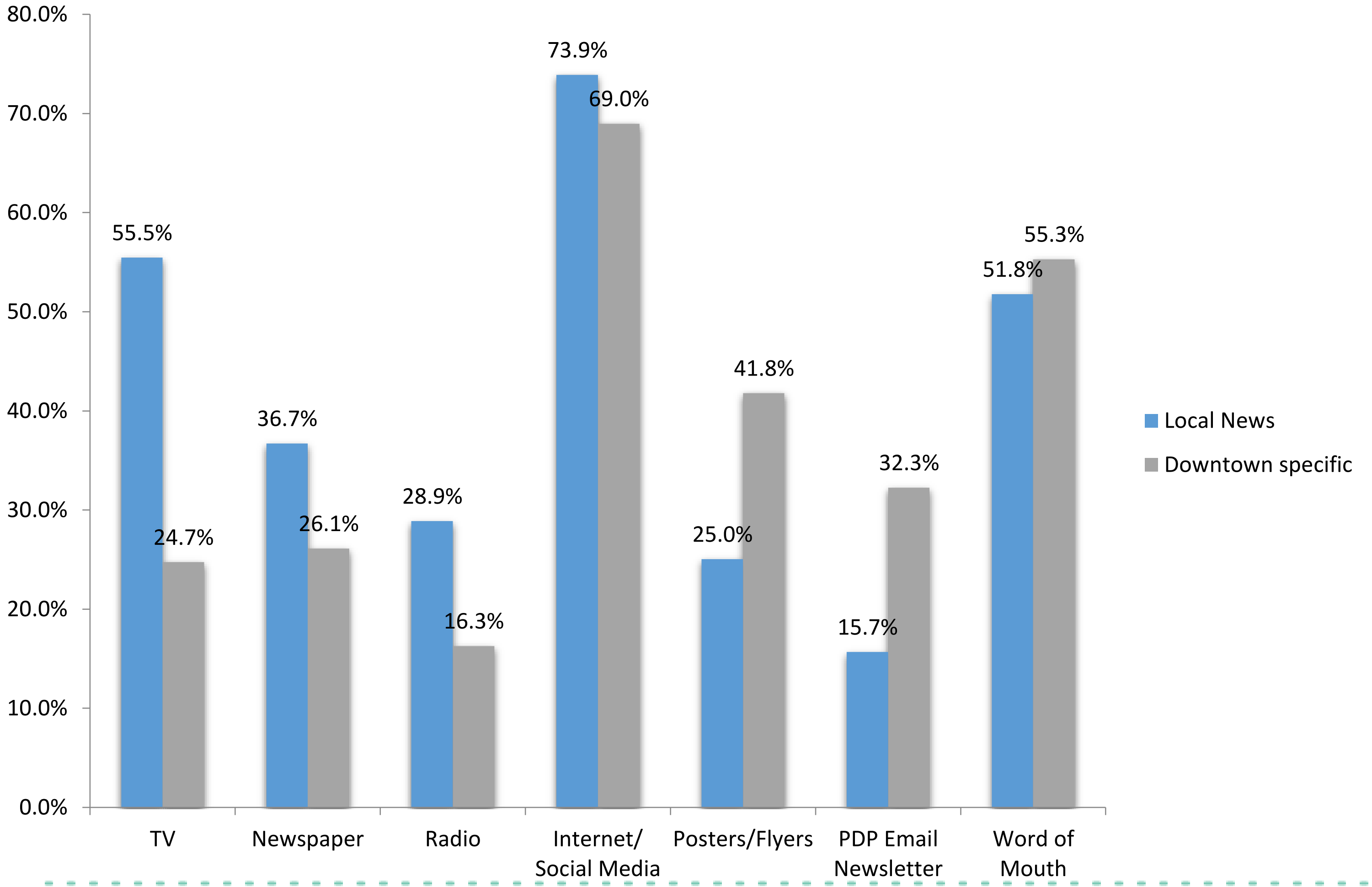
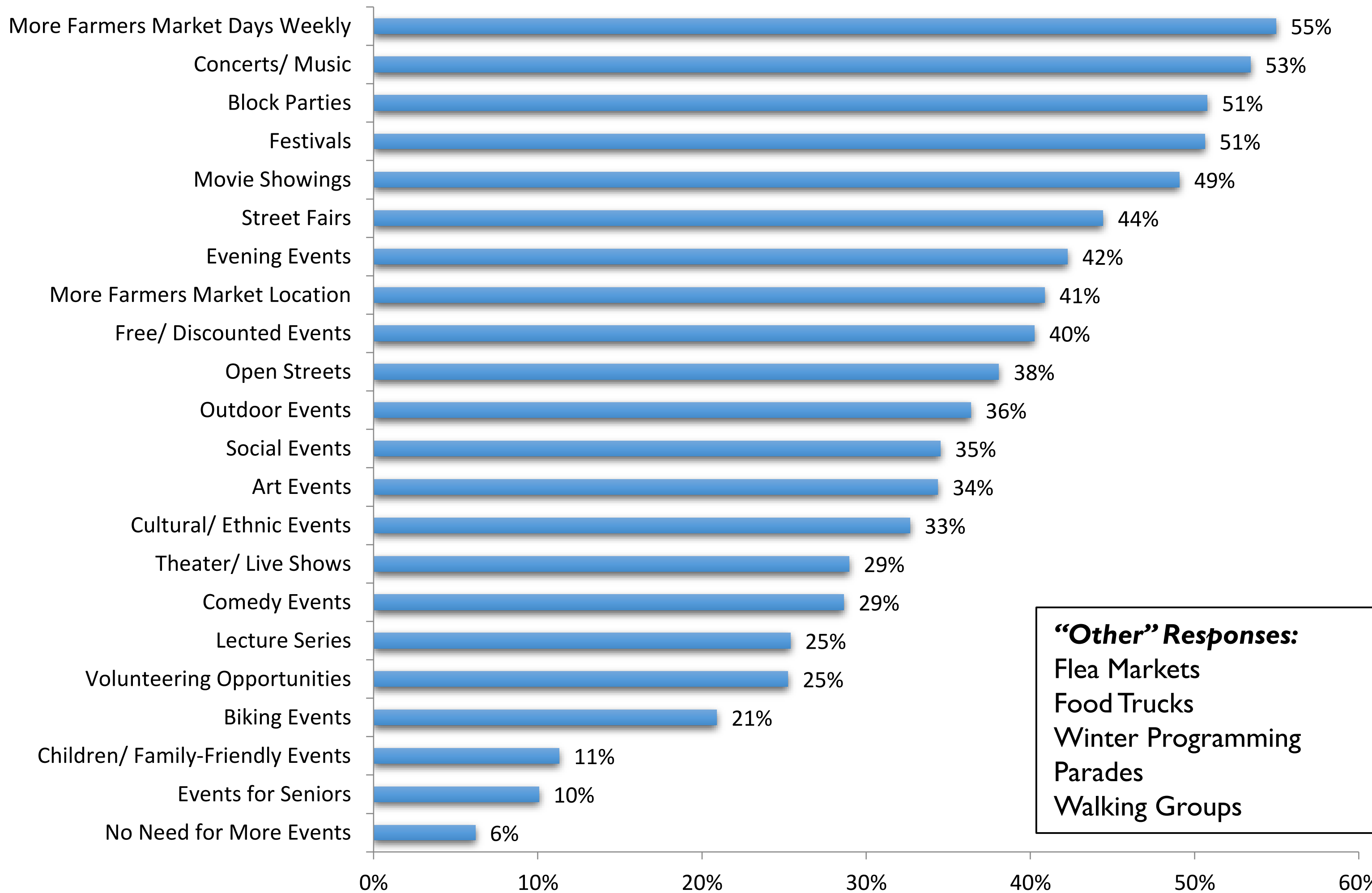
How Downtown Residents Obtain Local News



N = 651

Q30. How do you typically get information about local news?

Events and Programming wanted



"Other" Responses:
Flea Markets
Food Trucks
Winter Programming
Parades
Walking Groups

Q26. What types of events or programs would you like to see made available (or see more often) in your Downtown neighborhood?

N = 646

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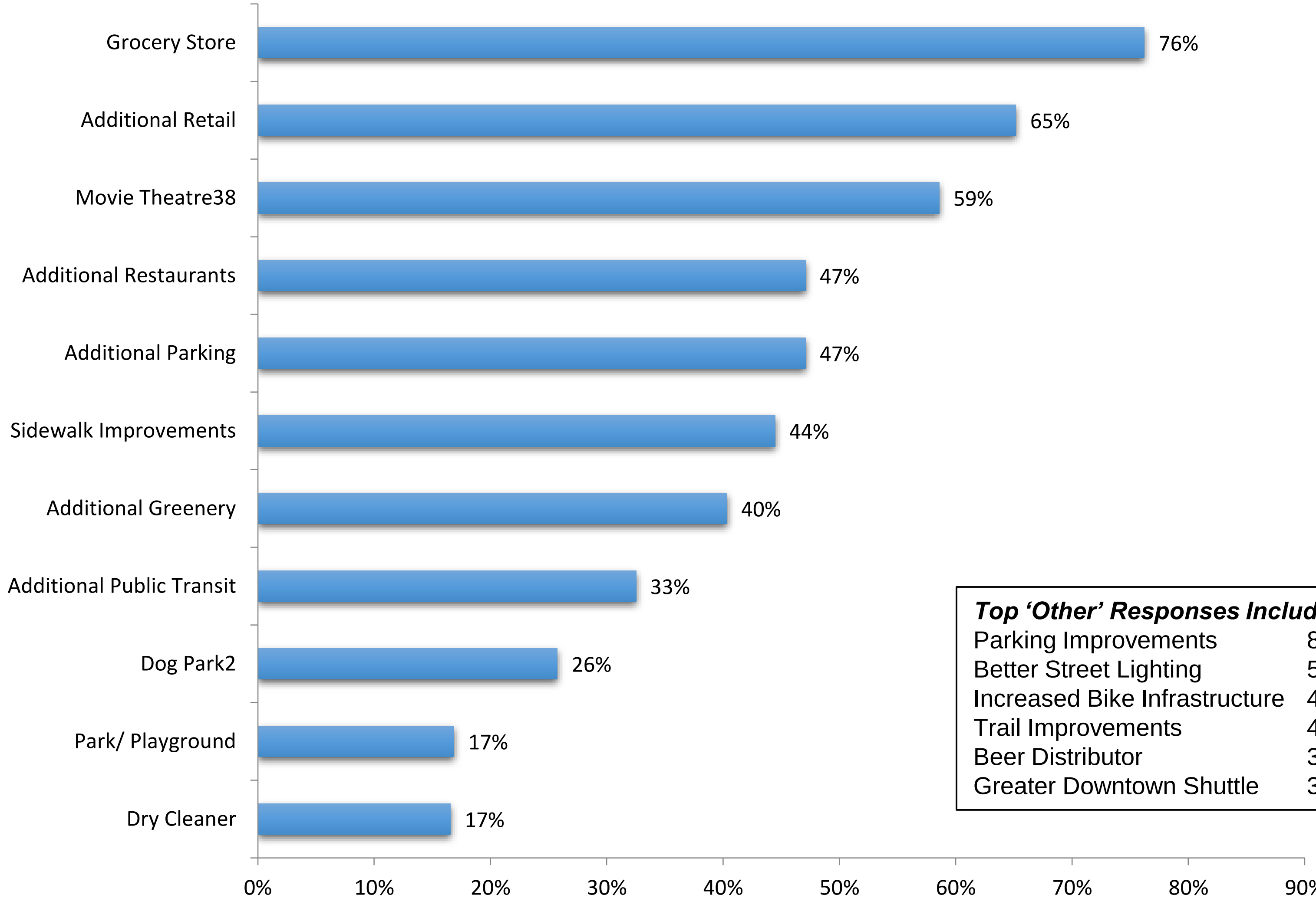
Additional Amenities Needed Downtown



Top 'Other' Responses Included:	
Parking Improvements	8.8%
Better Street Lighting	5.5%
Increased Bike Infrastructure	4.4%
Trail Improvements	4.4%
Beer Distributor	3.3%
Greater Downtown Shuttle	3.3%

Q25. What specific amenities would you like to see made available in your Downtown neighborhood?

N = 652

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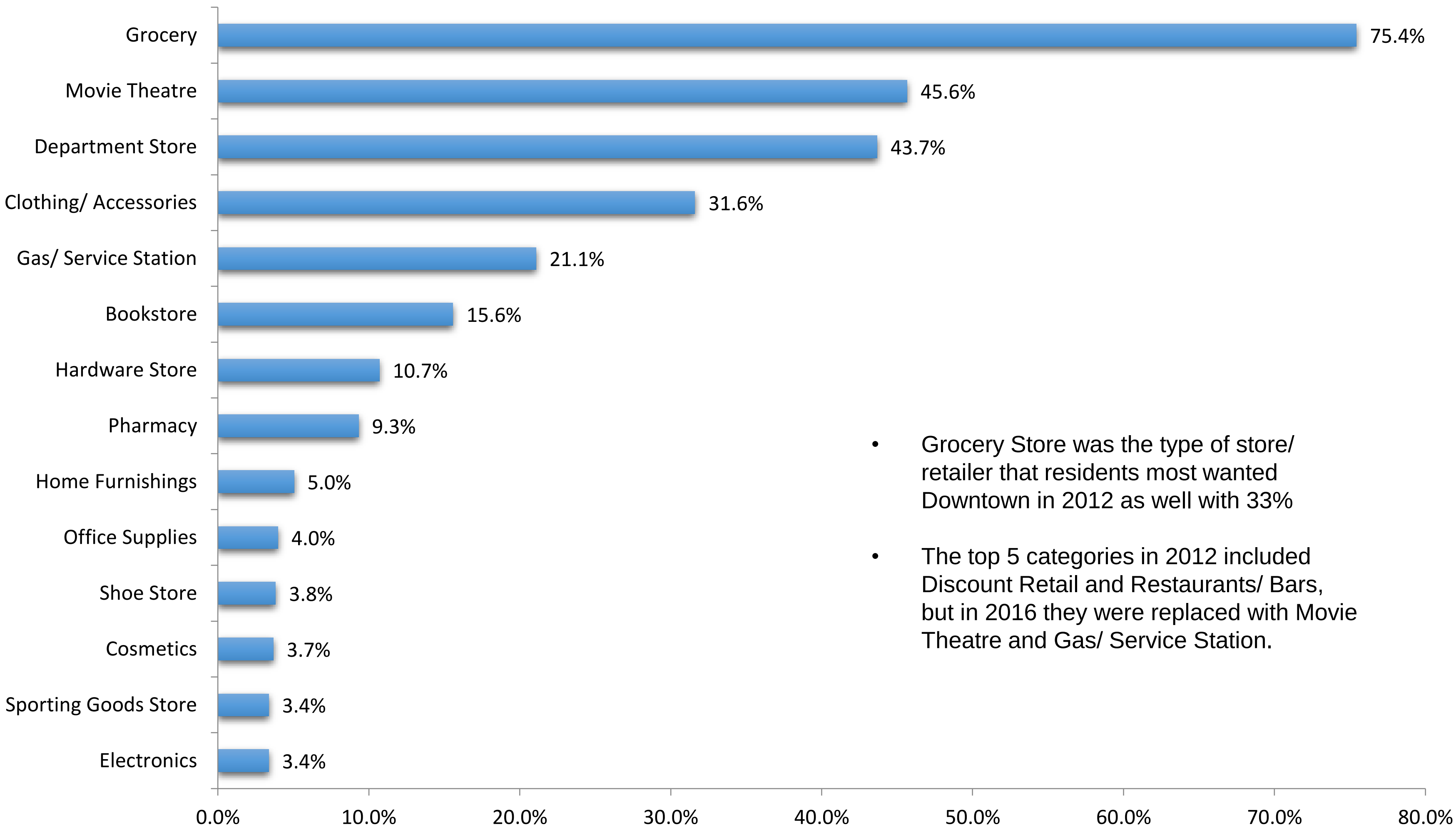
RETAIL TRENDS AND SPENDING HABITS

Retailers Residents Want Downtown



- Grocery Store was the type of store/ retailer that residents most wanted Downtown in 2012 as well with 33%
- The top 5 categories in 2012 included Discount Retail and Restaurants/ Bars, but in 2016 they were replaced with Movie Theatre and Gas/ Service Station.

Q16. What three retailers would you most like to see come into Downtown? Be as specific as possible.

N = 655

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Retailers Residents Want Downtown

Grocery Stores- 81% of Respondents	
Giant Eagle	30.4%
Trader Joe's	20.9%
Whole Foods	15.6%
Giant Eagle: Market District	9.5%

Discount Retail/ Mass Merchants – 45% of Respondents	
Target	64.5%
Walmart	9.0%
TJ Maxx	7.3%
Kohl's	5.7%

Clothing/ Accessories – 25% of Respondents	
Banana Republic	12.3%
H & M	10.1%
Unspecified Clothing/ Accessories	10.1%
Zara	9.4%

Department Store – 38% of Respondents	
Nordstrom	33.8%
Macy's	22.4%
Saks Fifth Avenue	8.2%
Bloomingdale's	6.8%

Movie Theatre – 12% of Respondents	
AMC	29.9%
Unspecified Theater	25.4%
Cinemark	10.4%

Average monthly spending habits

Average amount spent in a typical month	
Category	2016
Food & beverage	$314.78
Sporting events	$89.78
Non-sports entertainment	$80.06
Services	$66.90
Retailers	$55.27

Q19. In a typical month, how much money do you spend at the following Downtown establishments and events?

N = 641

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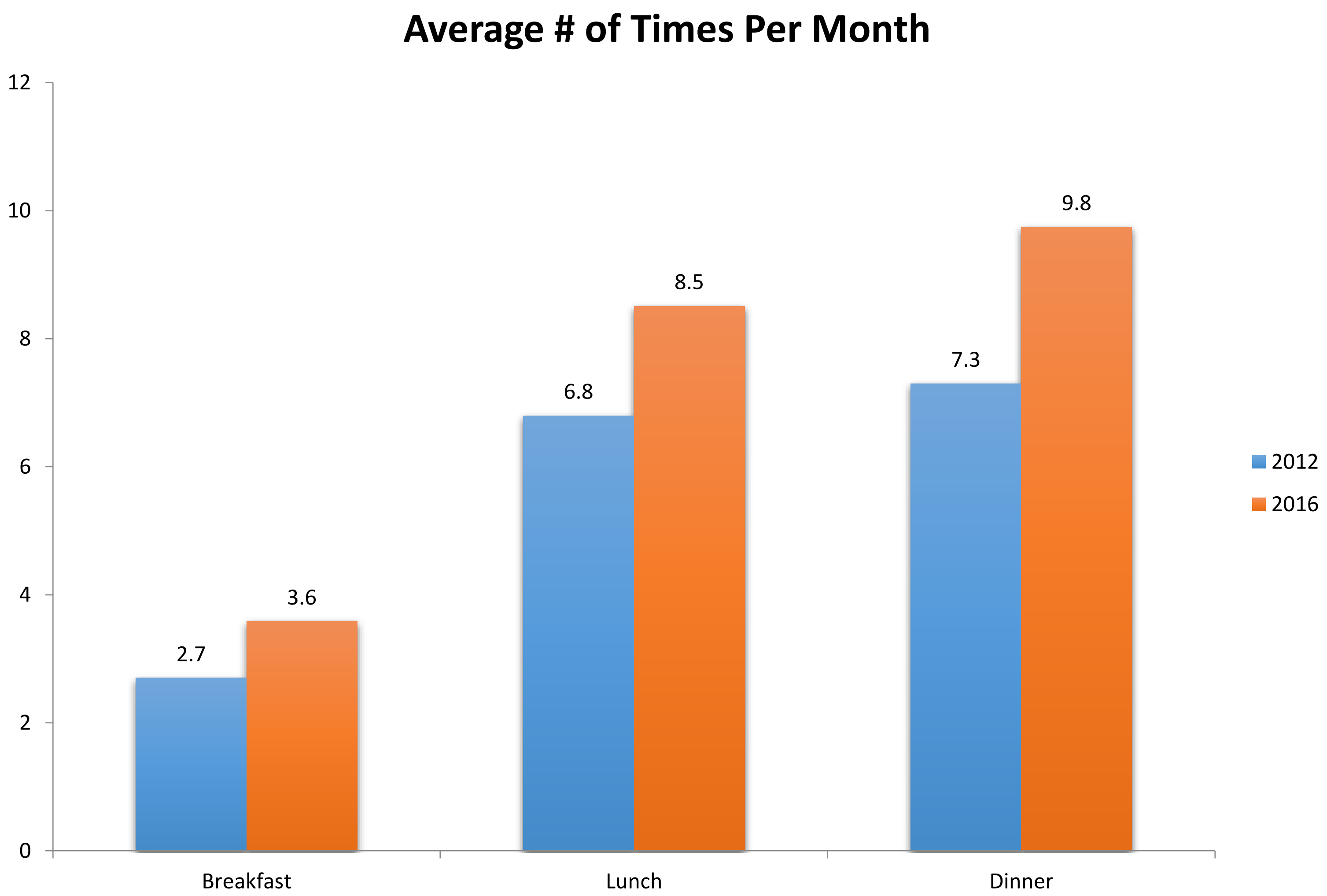
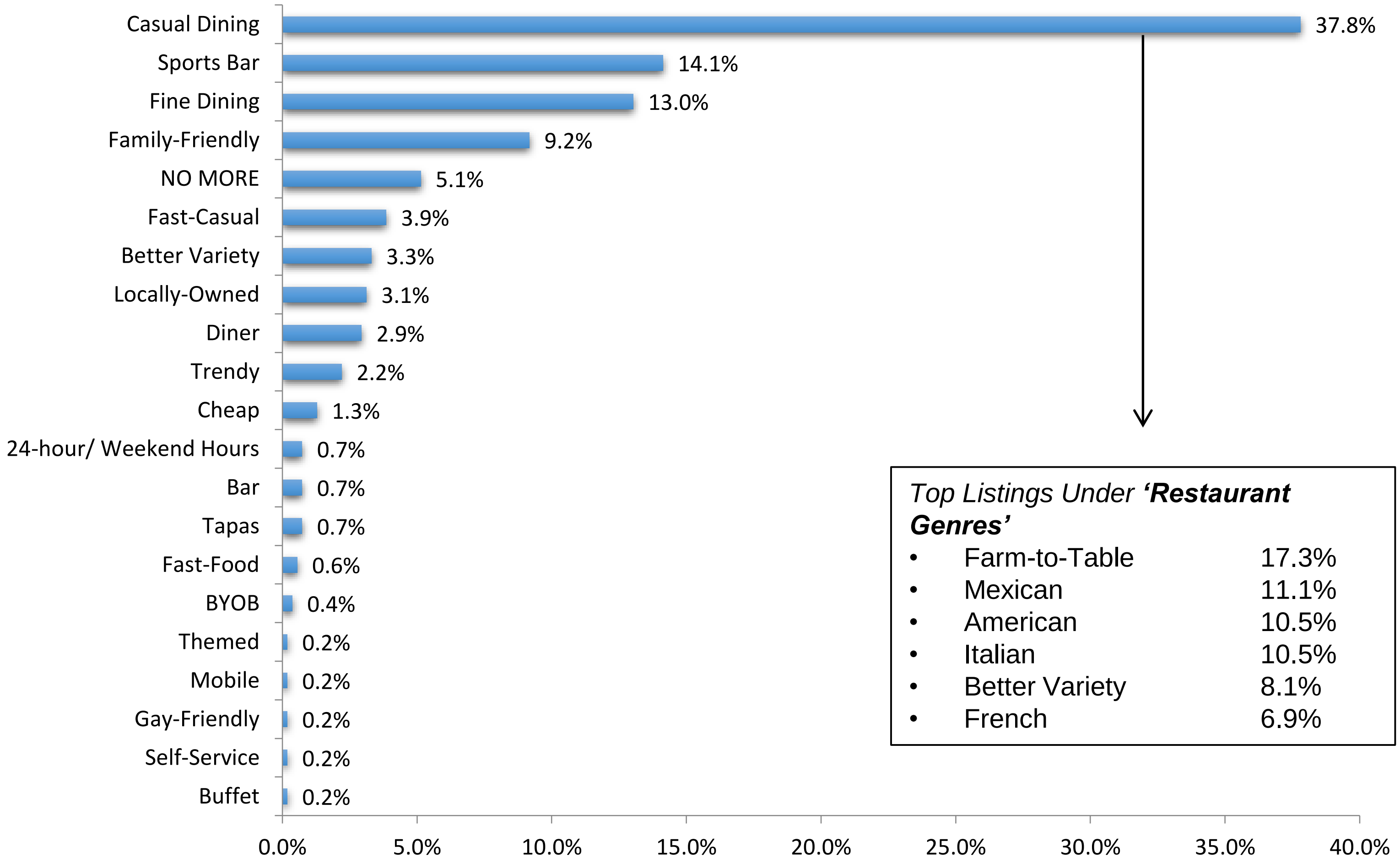
Frequency of Dining Out



Q17. How often (# times per month) do you eat/dine out in Downtown restaurants?

N = 652

Improving Downtown Dining



Q18. What changes and/or additions to Downtown's dining and restaurant scene would better serve your needs?

N = 545

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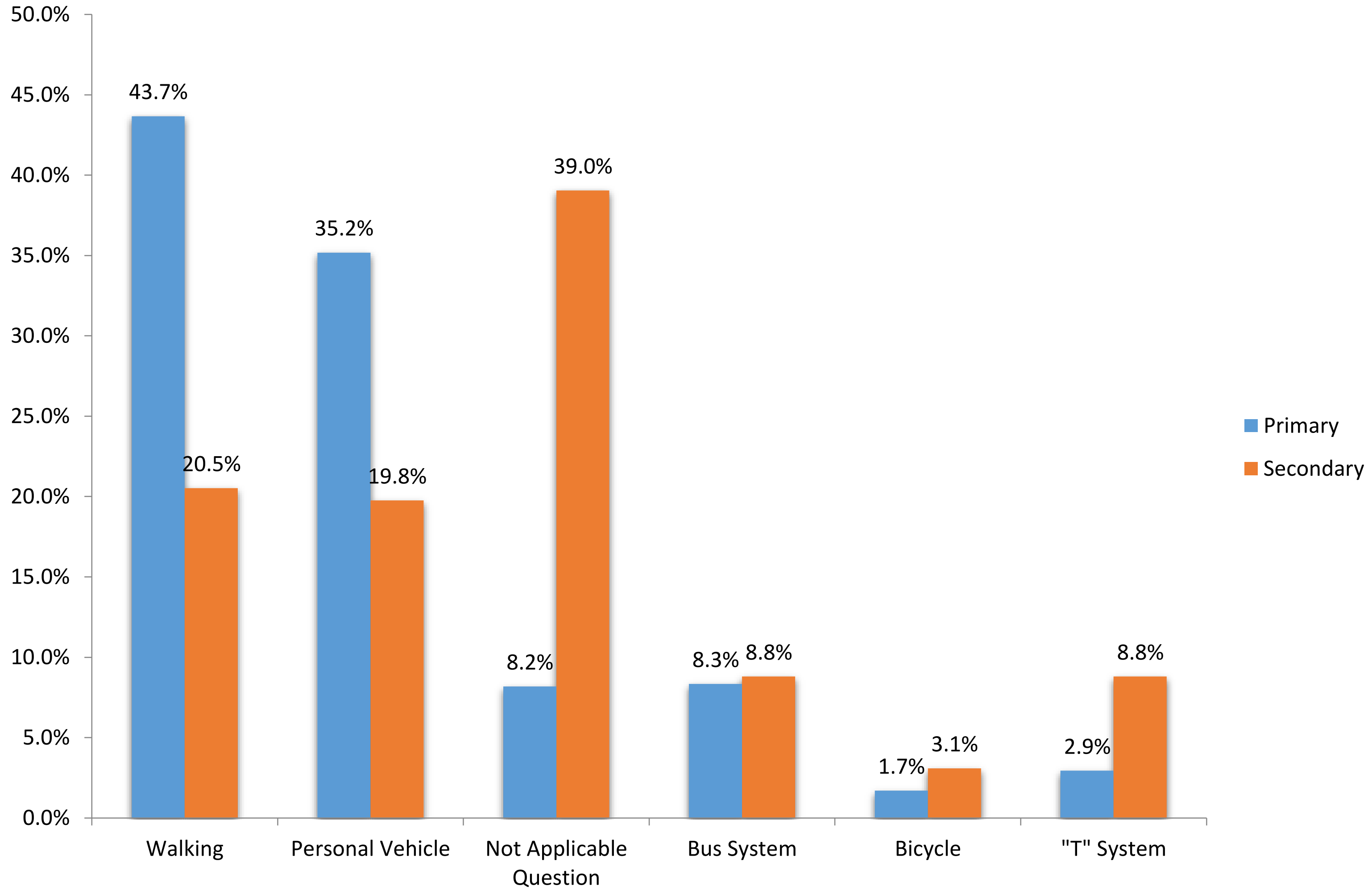
MODES OF TRANSPORTATION AND COMMUTING

Methods of Transportation Used for Work Commute



Q33. What method of transportation do you typically use to commute to work?

N = 648

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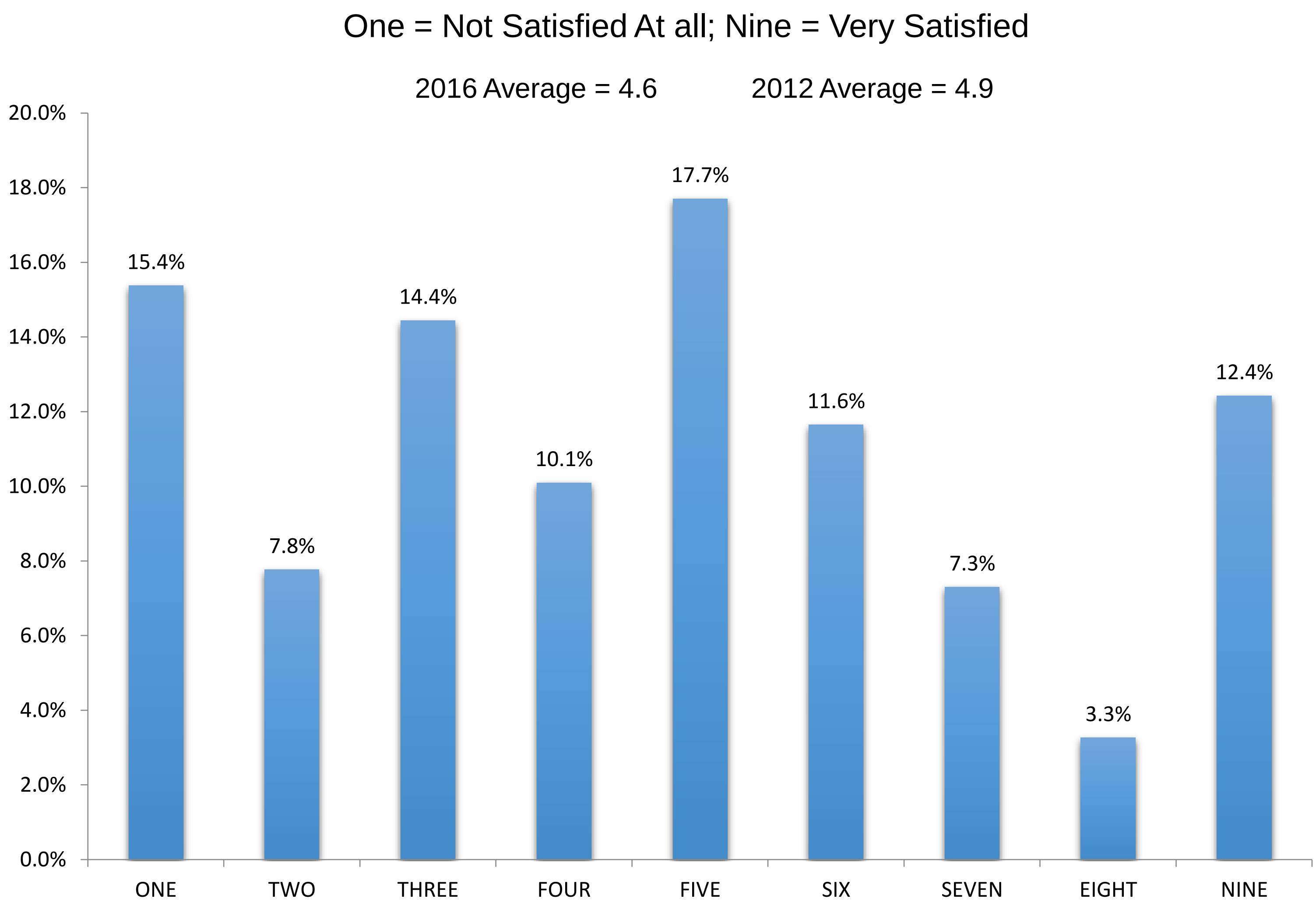
Satisfaction with Parking Downtown



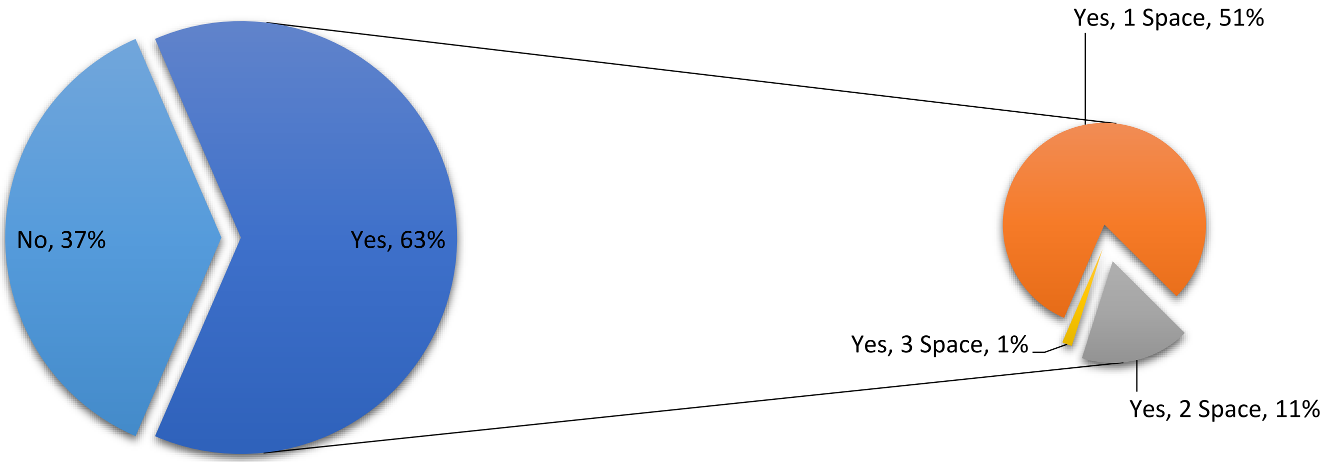
Q33. What method of transportation do you typically use to commute to work?

N = 648

PITTSBURGH DOWNTOWN PARTNERSHIP

Downtown Parking

Parking Leases Owned Per Household



Top 5 Parking Lease Locations	
Unspecified	31%
Theatre Square Garage	7%
Gateway Tower Garage	6%
8th Street Lots	6%
6th and Penn Garage	5%

Q35. Do you currently lease one or more parking spaces?

N = 646

Q36. If YES, how many spaces do you lease?

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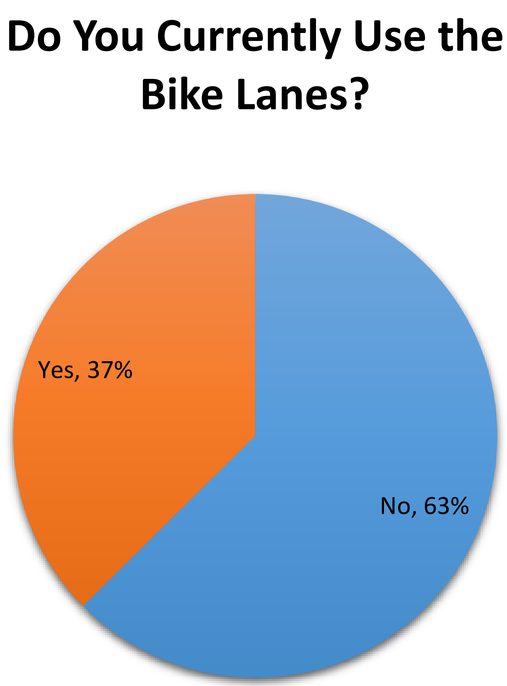
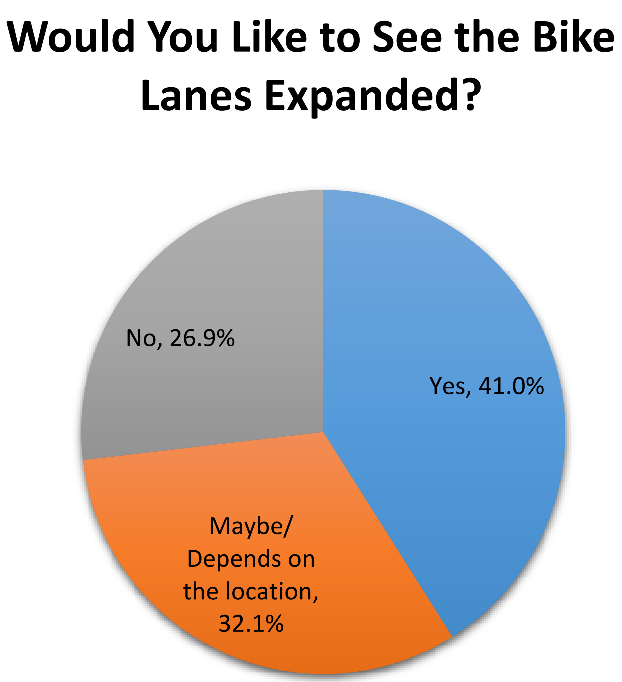
Bike Lanes





N = 647

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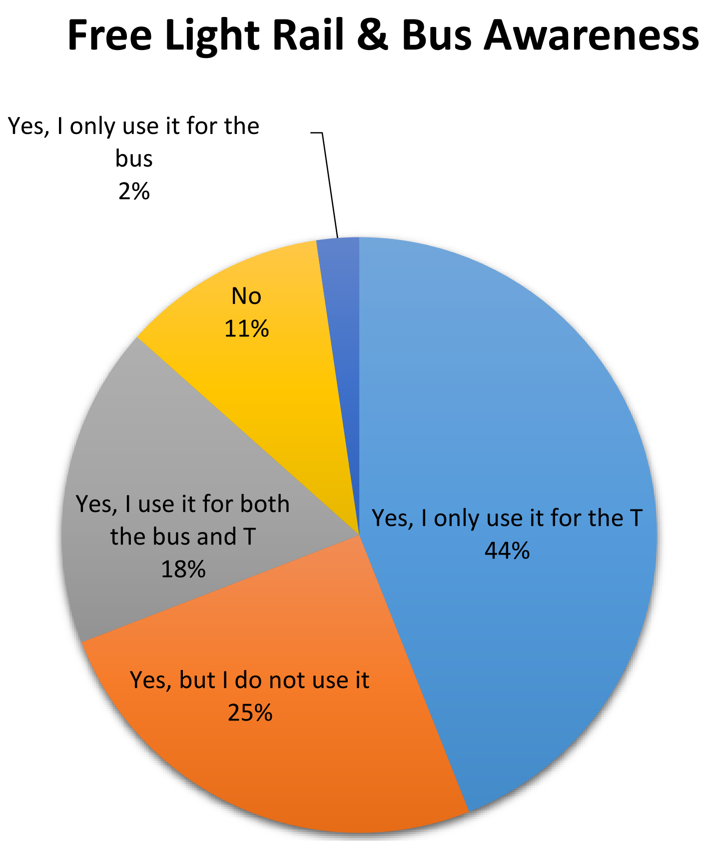
Free Downtown Transportation



Q37. Are you aware of the free T service to the North Shore from Downtown?

Q38. Have you ever used the free T service to or from the North Shore?

N = 648

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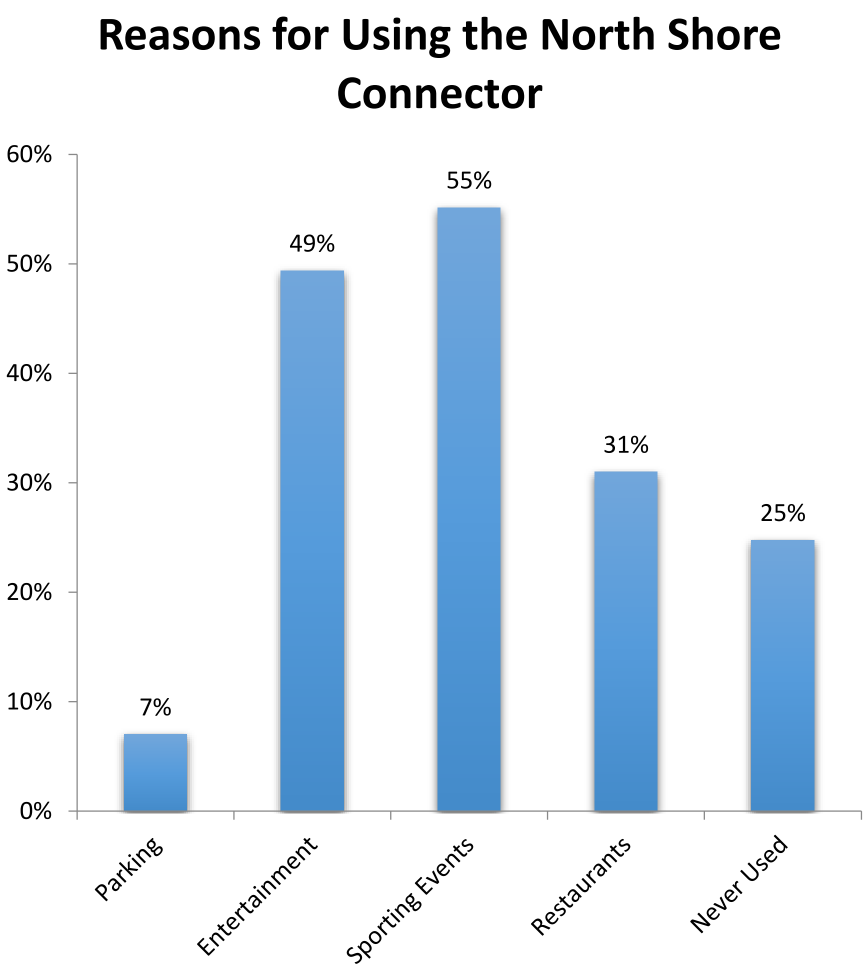
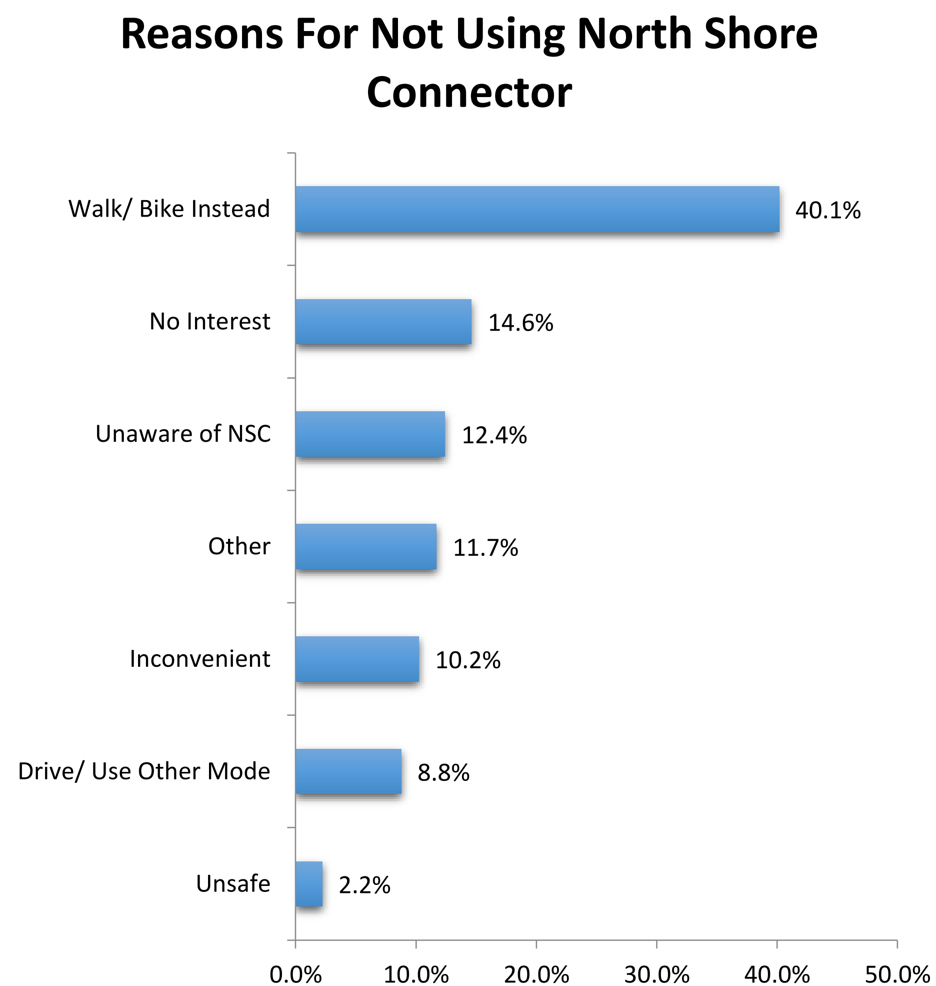
North Shore Connector

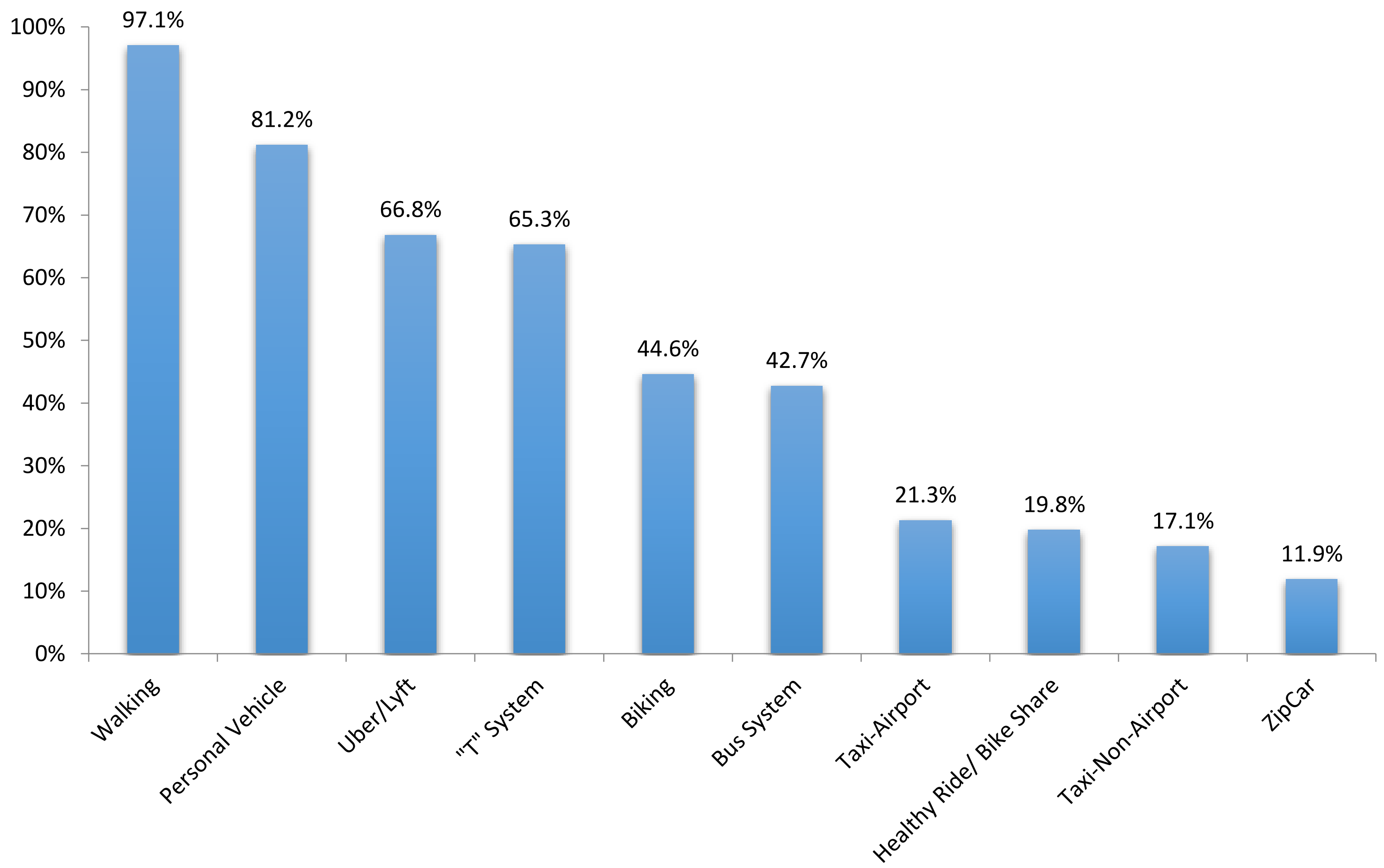




Q39. For what purpose did you use the free T service to or from the North Shore?
Q40. If you haven't used the free T system to or from the North Shore, why not?
These are multiple choice questions allowing for multiple answers per person. The charts reflect the % of people who chose each answer.
N = 642

PITTSBURGH DOWNTOWN PARTNERSHIP

Modes of Transportation used by Residents



Q32. Please indicate if you currently use each of these modes of transportation.

This is a multiple choice question allowing for multiple answers per person. The chart reflects the % of people who chose each answer.

N = 648

PITTSBURGH DOWNTOWN PARTNERSHIP

End of Survey Results

Please contact the Pittsburgh Downtown Partnership with additional questions.

pdp@downtowntownpittsburgh.com
412-566-4190

DowtownPittsburgh.com