Introduction:

The Pittsburgh Downtown Partnership (PDP) conducts research and studies to maintain data that can be used to inform internal programs and initiatives as well as support business decisions of current and prospective Downtown investors. In 2006, 2008, and 2010, the PDP commissioned pedestrian traffic counts and surveys to provide insight on traffic patterns and pedestrian opinions. This count and survey was conducted again in September 2012 in order to:

- Identify the reason for the pedestrian's visit to Downtown and quantify frequency
- Obtain information on mode(s) of travel to Downtown and the specific Downtown destination
- Profile demographic characteristics including gender, age, and income levels
- Collect perceptions on Downtown
- Measure the volume of pedestrians on select Downtown streets

Where possible, findings from 2012 were compared to data derived from the studies conducted in prior years.

Research Characteristics:

Downtown pedestrian traffic was counted over a three-day period in mid-September at nine specific locations. Researchers observed and recorded pedestrian volume (counts) from 7:00 AM to 7:00 PM each day. The study was conducted using the identical methodology as prior studies to allow comparative analysis and build upon benchmark statistics.

Over the three-day period, 172,686 pedestrians were counted walking by the following nine Downtown locations:

1) 5th Avenue (Wood & Market)
2) Smithfield (near Fifth Avenue)
3) Blvd of the Allies (near Wood)
4) Market Square (Dunkin' Donuts)
5) Market Square (near Moe's)
6) 6th Avenue (D-Tree)
7) Penn (near 6th)
8) Penn (near 9th)
9) Liberty (near 10th)

In 2010, a location at Wood Street near Fifth Avenue was included, but due to long-term construction at that location, upper 6th avenue near Ross Street was substituted in order to look at the pedestrian tendencies relative to new parking lots and development opportunities at the site of the former Civic Arena.

Researchers collected 481 surveys from all locations over the course of three days. The day, the time of day, and the locations are represented fairly evenly in this 2012 sample. There is a maximum margin of error of +/- 4.47%, meaning that if this study was repeated 20 times, under similar conditions, the same results (within 4.47%) would be observed 19 of 20 times.

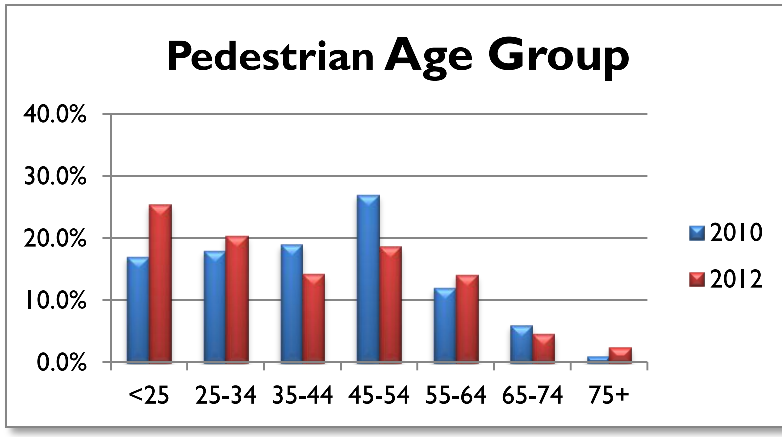
Findings:

<u>Traffic Count</u>

Pedestrian traffic was 4.9% higher [158,522 in 2010 compared to 166,265 in 2012] over the three-day period versus the comparable count total in 2010. Weekday traffic flow mirrors the typical 9:00 AM to 5:00 PM work day with higher volumes during morning and evening rush hour and lunch time. Despite a growing Downtown resident base and increased student housing, the end of the work day (5:30 PM) directly coincides with a sharp decline in Downtown Pittsburgh's pedestrian activity.

Evening traffic was counted for the first time in this 2012 study. Four locations were counted from 7:00 PM until 11:00 PM on Friday and Saturday. Friday volume generally trends downward after 7:45 PM, although there are fluctuations between 8:00 and 11:00 PM. Saturday evening volume also peaks and then drops after 7:45 PM. Unlike Friday, Saturday volume remains flat in the later hours (9:30-11:00 PM). The higher late- evening volume on Saturday accounts for much of the total volume advantage Saturday evening holds over Friday evening (Saturday generates 20% more traffic than Friday evening). Future Downtown pedestrian traffic research should seek to build upon 2012's evening assessments and include survey questions.

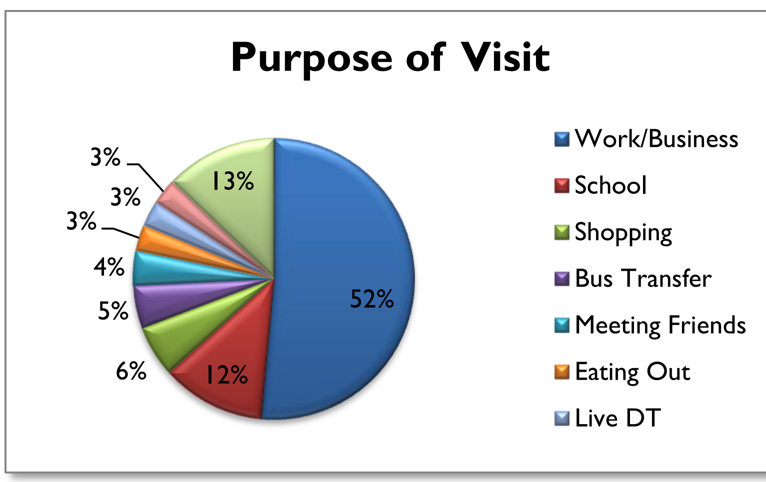
Pedestrian Demographics
The demographic profile remains fairly similar to the profiles seen in prior Pedestrian Traffic studies. There is an increase in the percentage of young people taking the survey with nearly 68% of the sample between the ages of 25 and 64, while the remaining skews young with over 25% under 25 and only 7% are 65 years of age and over, compared with 17% and 1% in 2010, respectively.



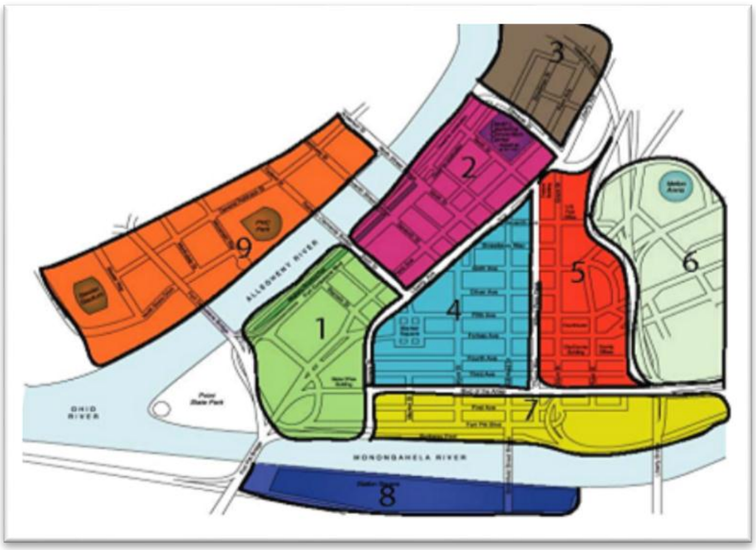
The 2012 sample also skews lower on household income than the 2010 sample. Over half (56%) have a total household income less than $50,000 and 44% have income of $50,000 or more. Out of those, 36% of those have a total income of $100k or more.

Downtown pedestrians are almost equally likely to reside in the City of Pittsburgh as they are to live outside the city limits. The growing number of Downtown residents continues to be reflected in the increased incidence of Downtown residents in the study sample, with 13% surveyed living in Downtown.

Purpose of Visit and Means of Commuting
Downtown Pittsburgh's pedestrians are largely a traditional workforce community. During the week, 52% of volume is work or career driven, with an additional 12% in Downtown for school, while on Saturday this group accounts for about 40% of the foot traffic. While there is a lower proportion of workers and students (relative to shoppers, theater patrons, etc.) on Saturday versus weekdays, the worker/ student segment is still the largest block of Saturday's Downtown pedestrians, accounting for 39%.



The results of this 2012 Pedestrian Traffic Study continue to affirm the importance of public transportation to Downtown's workers, students, and other daily visitors. Three studies, conducted in the past two years, consistently show over half (54%) use the bus or "T" systems to travel in and out of Downtown. Of the 26% who drove into Downtown alone, over half parked in the central core and cultural district

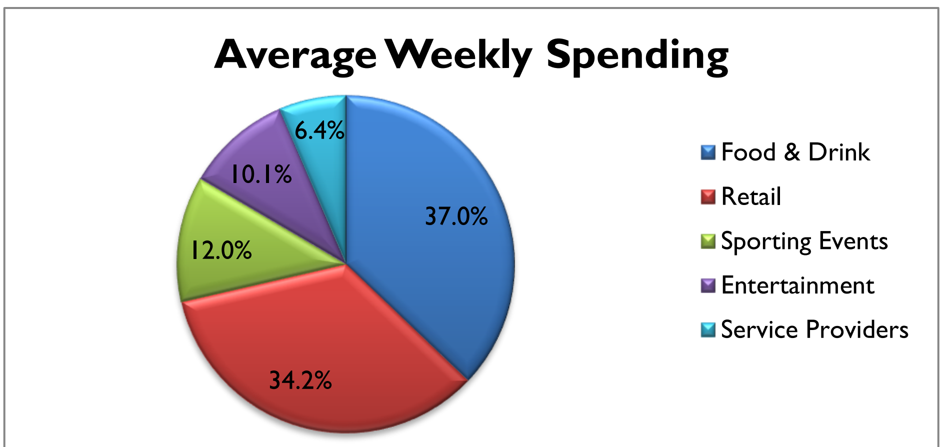


<u>Where Pedestrians Park:</u>

1. Gateway Center – 18%
2. Cultural District – 23%
3. Strip District – 1%
4. Central Core – 29%
5. Grant Street Corridor – 11%
6. Uptown – 4%
7. First Side – 6%
8. Station Square – 3%
9. North Shore – 5%

Following-up on a series of questions from 2010 related to the North Shore, 74% of all surveyed pedestrians are aware of the North Shore Connector and understand it is a free ride to and from Downtown. Over half (53%) have used the T extension; mainly for entertainment and sporting events and parking.

<u>Economic Impact</u>
Across five categories (retail, food & drink, entertainment, services, and sports events) an average of $108 is spent per person per week, a flat figure relative to 2010. Based on the 2010 PDP daytime population estimate of 126,000 this $108 average weekly spending roughly means spending $13,608,000 per week, or an annual economic impact of $707,616,000.



Food & Drink	Retail	Sporting Events	Entertainment	Service Providers
$40	$37	$13	$11	$7

Downtown Perceptions

Downtown is perceived as a safe place, but overall perceptions of safety at night remain a concern. 92% feel safe or very safe during the day in Downtown with less than 1% feeling not safe at all. Attitudes change when asked about safety at night, where 49% feel safe or very safe, 8% feel not safe at all, and 29% feel somewhat safe.

A large majority of pedestrians name Market Square their favorite public space in Downtown in an open-ended question. More importantly, pedestrians are also voting with their feet by visiting Market Square an average of 3.1 times per week.

When asked about awareness of the Pittsburgh Downtown Partnership, 62% of Downtown pedestrians indicate they are aware, on par with responses from 2010, 2008, and 2006. Downtown residents are more likely than other groups to be aware; however this group's awareness drops from a high of 85% in 2010 to 70% in 2012. The organization continues to be viewed positively by Downtown pedestrians, who identify the PDP with "keeping Downtown clean, developing/improving Downtown, helping businesses, and promoting events" to name a few.

Conclusion

The results of the 2012 Pedestrian Traffic Study continue to affirm a strong pedestrian base in Downtown Pittsburgh. Overall traffic volume is higher in 2012 than in prior years studied, with a 5% increase over the comparable total count in 2012. Findings are consistent with earlier PDP-commissioned studies and few significant variances were observed. The PDP will continue to evaluate data with strategic partners to identify any areas of interest or determine if further research should be considered in future studies.

Overall, pedestrians seem to be content with Downtown and show interest in staying later into the evening but site a lack of open businesses as the major challenge. Downtown has seen a significant increase in the number of restaurants and bars that are opened later into the evening and will work to encourage a continued shift in this behavior. Nighttime activation along with issues such as perceptions of safety demonstrate that education of current facts is as important as concentrating efforts on creating solutions to physical problems that were addressed.

This research is important to know the dynamics, behaviors, and needs of the people who live, work, and use Downtown. This project was commissioned by the PDP and conducted by Pittsburgh-based Strategic Metrics Group.

A full copy of the survey findings is available at DowntownPittsburgh.com/Research.