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 2008 and 2010, the PDP commissioned the Downtown Resident Survey to guide policy and provide insight into how residents view their Downtown neighborhood and what changes and/or additions they would like to see. This survey was conducted again in 2012 in order to:

- Profile demographic characteristics of Downtown residents, including gender, age, and income levels
- Gauge resident satisfaction with the Downtown neighborhood, restaurants and retail
- Identify the methods of transportation most frequently used by Downtown residents
- Collect general perceptions on Downtown and the PDP

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

Research Characteristics:

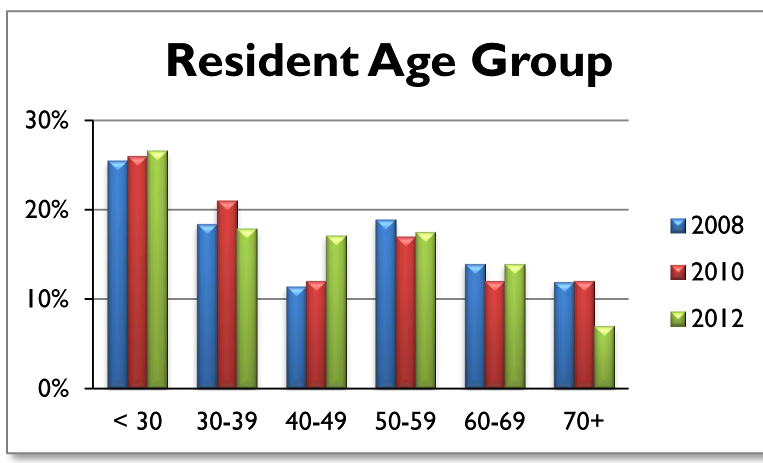
The Downtown Resident Survey was released to each multi-family property in the Greater Downtown area in November 2012 and was available for completion for 31 days. By working with building managers, the survey was distributed to residents either by email, hard-copy or both.

A total of 574 surveys were completed during the survey period, 64 more than in 2010 and 161 more than in 2008. A total of 31 properties participated, the top three properties with the highest response being Washington Plaza (54), followed by Gateway Towers (44) and The Pennsylvanian (43).

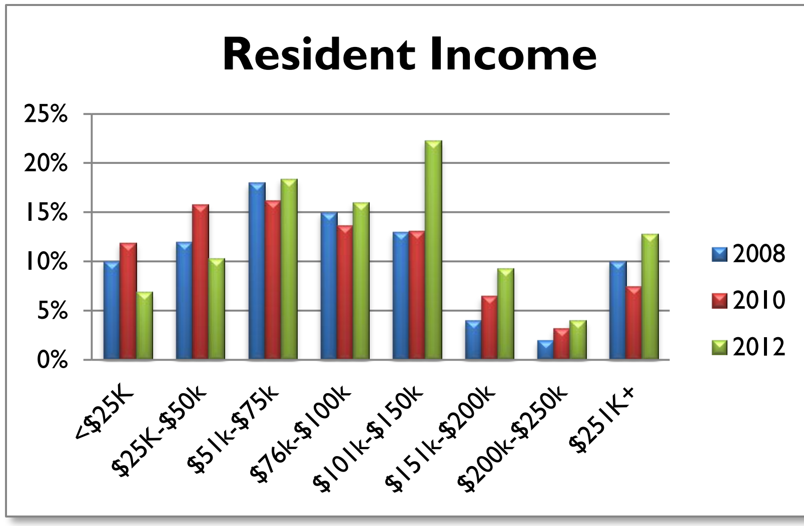
Findings:

Demographics

The demographic profile of Downtown residents remains similar to the profiles seen in previous Downtown resident surveys. As was the case in both the 2008 and 2010 surveys, Downtown residents remain young, with 45% of residents living Downtown under the age of 40, and 27% under the age of 30. Only 7% of residents are over the age of 70, compared with 12% in both 2010 and 2008.



Income levels trend higher in 2012 compared to earlier surveys, whereas 48% have annual incomes of over $100,000, up from 31% in 2010, and conversely 17% of residents make less than $50,000 annually, down from 28% in 2010.



Downtown residents who are married now make up 35% of the population, up from 25% in 2010, and 51% of households have more than one person, compared to 40% in 2010.

Moving to Downtown

More than 7% of residents have lived Downtown for one year or less, with a total average tenure of 3.5 years, compared to 4.4 years in 2012. This can be due to the fact that many surveys were completed by residents in newly opened buildings, but that cannot be considered reason alone. The majority of residents (56%) moved Downtown from other locations in Allegheny County, and 59% of those move from other neighborhoods in the City of Pittsburgh. Another 10% came from outside of the region but within Pennsylvania, and 30% outside of Pennsylvania.

When deciding to move Downtown, residents noted other in which they considered moving, including Shadyside (34%), Southside (19%) and the North Side (14%) as the top choices in an open ended questions. Conversely, more than 25% stated that Downtown was their first and only choice and they did not consider any other locations in their housing search.

When asked to list the primary reason why residents chose to live Downtown in an open ended question, 48% listed proximity to work/school. Convenience, events and activities, and city living were also listed with 14%, 14%, and 13% respectively.

Satisfaction Living Downtown

Overall, residents are very satisfied with living in the Downtown neighborhood. On a scale of 1-9 with 1 being ‘not satisfied at all’ and 9 being ‘very satisfied’ with their decision to live Downtown, 52% answered 9 with the average score of 8, in line with the 2010 numbers.

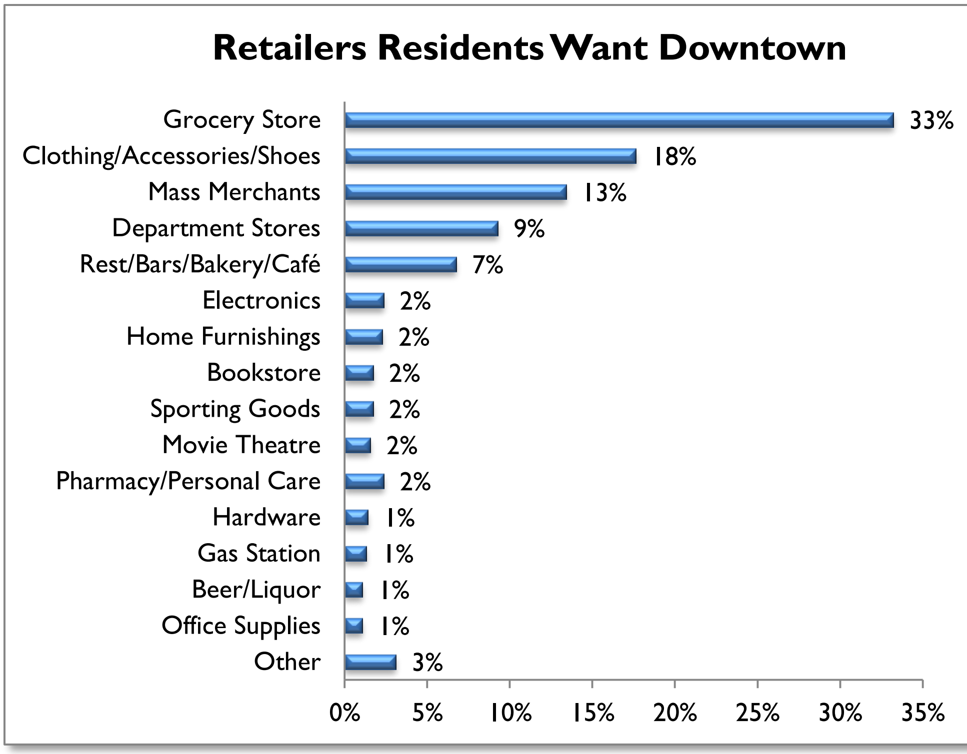
The top three positive aspects affecting quality of life living Downtown were listed as the availability of entertainment, activities, and events, mentioned by 31% of respondents, the availability of restaurants and dining, mentioned by 28% of residents, and the convenience and central location of Downtown, listed by 26% in an open ended question.

Residents noted a need for improved amenities and quality of life issues, whereas 34% of respondents identified the lack of a grocery store, 19% with parking difficulties, 13% with perceived safety issues, and 10% in need of additional retail, all as factors negatively impacting satisfaction with Downtown living.

Restaurants and Retail

It is clear that a grocery store remains the number one retailer that residents would like to see in Downtown. In an open ended question, 33% of residents listed the need for a Downtown grocery, compared with 31% in 2010. Top grocery stores mentioned included Giant Eagle, Whole Foods, and

Trader Joe's. Other categories of retailers that residents would like to see more of include Clothing/ Accessories/ Shoes (18%), Discount Retail/Mass Merchants (13%), Department Stores (9%), and Restaurants/Bars/Bakery/Cafe (7%).



In an open ended question, residents believe that the Downtown dining experience can be improved by making three main changes. More than 47% noted need for adding additional options, or more specifically Asian dining, healthier options, breakfast options, and additional ethnic options. Having restaurants stay open later and on weekends, and more mid-level priced options were both listed by 21% of respondents. At the same time, 11% of residents are completely satisfied with the Downtown dining scene as it is now.

Residents spend over $300 per month on food and beverages at Downtown establishments, over $100 a month on Downtown retail and sporting events, over $90 a month on Downtown entertainment, and over $70 a month on Downtown services.

<u>Downtown Neighborhood</u>
In the 2010 survey, 71% of Downtown residents answered that they would like additional community events Downtown. When answering the same question in 2012, the percentage requesting more events dropped to 53%. The type of events requested most were concerts/music and outdoor events.

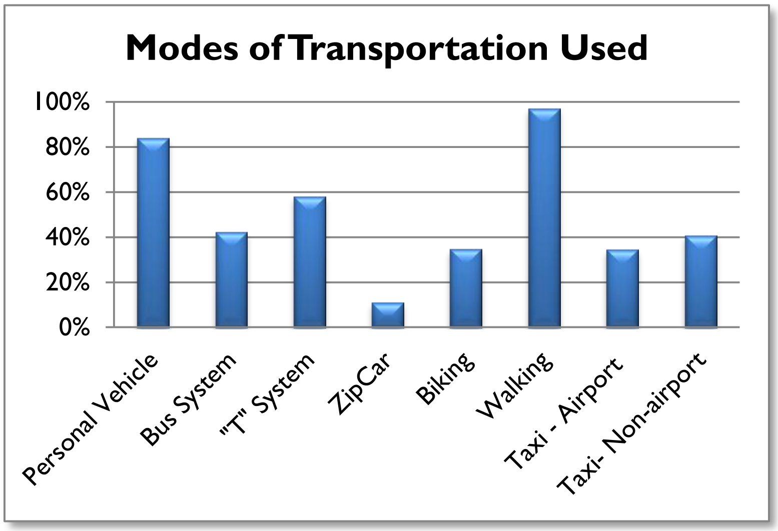
A grocery store was also listed as the number one amenity needed Downtown in an open ended question, listed by 41% of respondents. A park/playground was listed by 11% and additional retail was listed by 9%.

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

Downtown is perceived as a safe place, but overall perceptions of safety at night are lower than during the daytime. 94% feel safe or very safe during the day in Downtown with less than 1% feeling not safe at all. When asked about safety at night, where 58% feel safe or very safe, 12% feel not too safe or not safe at all, and 30% feel somewhat safe. Safety perceptions can be connected to 44% of respondents noting that a lack of adequate street lighting to be an issue throughout Downtown.

<u>Transportation</u>

In a multiple choice question that allowed for multiple selections residents were asked what modes of transportation they use, walking was first (97%), followed by personal vehicle (84%), the "T" system (42%), and the bus system (42%). Most residents either walk (46%) or use a personal vehicle (42%) for their commute to work.



Residents are divided on Downtown parking. One a scale of 1-9 with 1 being not satisfied at all and 9 being very satisfied the average score was 4.9, with 15% selecting 1 and 13% selecting 9.

Ideas for improving parking Downtown include, creating additional parking spaces/garages, offering lower rates for Downtown residents, and making parking available [creating a parking program specifically] for visitors of Downtown residents.

A large majority (86%) of Downtown residents are aware of the free North Shore connector but only 60% have used it. Those who do not use it listed two main reasons, no need or occasion (37%) and walk or bike instead (37%) in an open ended question.

Conclusion

The results of the 2012 Resident Survey depict a younger and growing populous with higher incomes living in Downtown Pittsburgh. More surveys were collected than in both of the previous two resident surveys. The findings share many similarities with the previous surveys, particularly the need for a grocery store Downtown, but also shed light on some of the shifting demographics and opinions of Downtown residents, particularly an increase in residents with higher income levels, an increase in multiple member households, and shorter tenures in residences.

Overall, residents seem to be content with the Downtown neighborhood and show an interest in continuing to make the neighborhood a better place to live. Residents frequently mention how much they enjoy the events, activities, entertainment, and dining that Downtown has to offer. The convenience of living in a centrally located, walkable neighborhood also factors heavily into the satisfaction of the residents. This research is important to know the dynamics, behaviors, and needs of the people who live Downtown in one of Pittsburgh's fastest growing and most vibrant neighborhoods. A full copy of the survey findings is available at DowntownPittsburgh.com/Research.