# 2018 Downtown Resident Survey Overview

PITTSBURGH DOWNTOWN PARTNERSHIP

## About the Survey

The Pittsburgh Downtown Partnership (PDP) conducts a resident survey every two years to gather the feedback and opinions of residents in Greater Downtown (Golden Triangle, North Shore, Uptown, and Strip District). The data obtained from this survey is used by the PDP to inform decision making within the public and private sectors as well as to guide PDP programming and initiatives. The 2018 resident survey is the fifth resident survey that has been conducted since the PDP began data tracking in 2008. Trends across surveys have been analyzed where applicable and to the extent that the data can be reliably compared.

The 2018 Resident Survey was conducted electronically and made available to residents from February 19, 2018 through March 12, 2018. The survey, which was supported by Piatt Sotheby's International Realty, was distributed with assistance of property/building managers and through direct postcard mailing to all units in multi-family properties. A total of 567 surveys were completed.

**Results by Section:**

## Demographics

- 67% of residents who took the survey currently reside in the Golden Triangle, while 33% of respondents live in periphery areas of Greater Downtown including the Strip District, Uptown, and North Shore.
- The majority of respondents who completed the survey identify as female (61%). About 40% of residents who took the survey were millennials (ages 22-37 years old). Respondents indicated their ethnicity as White (90%), Asian (6%), Black (5%), and Hispanic or Latino (3.3%).
- 82% of respondents have at least a four-year college degree (44% Bachelor Degree, 29% Master Degree, and 13% Doctorate). 18% of residents reported total household earnings of $101k-$150k, with as many was 14% of households generating over $251k.
- Households with 1 to 2 people represented 94% of respondents, 47% were single; 48% were married or living as a couple.
- 22% of residents reported that they own a dog.
- The top industries residents work in are professional, scientific, and technical services (22%), healthcare/social work (18%), finance and accounting (15%), and law (9%). 74% of respondents work in Greater Downtown (zip codes: 15222, 15219, 15212), 4% more than in 2016.

## Downtown Living

- The top three reasons residents cited for choosing to live Downtown are proximity to work/school (36%), desire to live in an urban environment (34%), and walkability (8%).
    - Desire to live in an urban environment increased by 5.7% from 2016 and by 20.7% from 2012
- 75% of respondents reported that they currently rent property and 25% own their home. Of the subset of residents who currently rent property, 48% of them would consider purchasing residential real estate Downtown.

- 30% of residents moved Downtown from surrounding suburbs outside of the City of Pittsburgh area, 23% moved from other City of Pittsburgh neighborhoods, and 23% moved Downtown from areas outside of Pennsylvania.
- Shadyside was the most common location other than Downtown that residents considered in their housing search, representing 34% of respondents. Areas of Greater Downtown located outside of the Golden Triangle including the Strip District (32%) and North Shore (22%) were also among the top four most popular areas considered. Lawrenceville was the third most popular area representing 28% of responses. 19% of residents did not consider any other area than Downtown in their housing search.
- On a numerical scale of 1 “not satisfied at all” to 9 “very satisfied,” residents showed a weighted average of 7.7 with their property/building choice. The largest subset of residents (38%) ranked their satisfaction with their property/building as a 9 “very satisfied.” Overall, 62% of residents are “very satisfied” with their decision to live Downtown. 38% of residents anticipate living Downtown for 10+ years; the average length of years anticipated to live Downtown is 6.8 years.
    - Satisfaction with building/property in 2016 was 7.3 and 7.7 in 2012.
    - Satisfaction with decision to live Downtown in 2016 was 7.3 and 8 in 2012
    - Average years anticipated to live Downtown in 2016 was 5.1 and 5.5 in 2012.
- Residents consider the top five major issues Downtown to be homelessness and panhandling (41%), the condition of alleyways (30%) and sidewalks (26%), litter (24%), and noise from construction (18%). Crime was chosen as a mild issue by 59% of residents.
- Residents cited walkability (28%), convenience/location (18%), and proximity to work/school (13%) as having the greatest positive impact on their overall quality of life as a Downtown resident. Conversely, a lack of a grocery store (28%) was cited as having the greatest negative impact on quality of life as a Downtown resident.
    - The lack of a grocery store has been ranked as the primary negative impact on residents’ quality of life since 2012.
- Market Square, Point State Park, and the Allegheny Riverfront Trail were reported as residents’ top three favorite public spaces Downtown.

## Retail and Spending

- A grocery store (89%), movie theater (50%), and department store (47%) were the top three most desired retail categories residents want Downtown. Top retail brands that respondents mentioned include: Target (53%), Giant Eagle (27%), Trader Joe’s (24%), and Whole Foods (21%).
- On average, Downtown residents spend $300 a month at restaurants. Residents reported that they spend just $43 per month at Downtown retailers (clothing, accessories, etc.), $181 per month on services (dry cleaning, health clubs, salons, etc.), $90 on entertainment, and $81 on sporting events.
- Residents order food or dine out for breakfast once a week and twice a week for both lunch and dinner. Most residents (71%) go shopping for groceries between two to four times per month. More than half of residents (58%) would like to see more café/bistro type restaurants than any other type of dining.
- Live concerts/ music was cited as the most popular event type that residents would like to see more of Downtown (67%), followed by cultural/ ethnic and art events, 47% and 37% respectively.

## Transportation

- 82% of all residents selected walking as a mode of transportation that they use, Uber/Lyft and driving a personal vehicle were also popular modes of transportation at 77% and 76% respectively. Walking (51%) followed by traveling in a personal vehicle (28%) are the most common primary modes of transportation. A secondary mode of transportation was not applicable for 30% of residents whereas, of those that utilize a secondary mode of transportation, 19% use their personal vehicle and 15% choose to walk.
    - The use of Uber/Lyft as a mode of transportation increased by 10% compared to 2016
    - The use of a personal vehicle has decreased by almost 6% since 2016
- 60% of residents lease at least one parking space. Of this subgroup, 84% lease one space and 15% lease two spaces.
- 66% of residents showed some level of satisfaction (somewhat satisfied, satisfied, or very satisfied) regarding the availability of parking Downtown; 20% of residents do not use Downtown parking.
- 50% of residents would like to see the bike lane network expanded throughout Downtown.

## Conclusion

The 2018 Downtown Resident Survey showed many consistencies compared to surveys conducted in prior years. Despite having a lower number of responses compared to the 2016 survey (n= 567, 2018 vs. n= 750, 2016), property representation from multifamily properties Downtown and other demographic information was similar with only subtle differences. Compared to the 2016 resident survey, there were slight variances in resident age, household income, and an increase in percentage of residents who work in Greater Downtown. Many aspects of Downtown living have remained the same when compared to previous survey results. Greater Downtown's population has grown by nearly 3,000 residents since 2010. The Golden Triangle area alone experienced a 43% increase in number of residents within this same time period. Given the growth of the residential population and increased satisfaction with living Downtown (+12% compared to 2016), Downtown continues to be the premier location for residents to live, work, and play. Proximity to work or school, walkability, and the desire to live in an urban environment continue to influence the decision to live Downtown and attract new residents.

**The 2018 Downtown Resident Survey was supported by:**

Piatt Sotheby's INTERNATIONAL REALTY