Downtown Resident Study

Pittsburgh Downtown Partnership

October 2008

Prepared by: STRATEGIC METRICS GROUP

www.strategicmetricsgroup.com 412.480.4332

Resident Sample Demographics

Decision to Move Downtown

Satisfaction with Downtown Living

Shopping Behavior

Downtown Parks & Events

Transportation Usage & Attitudes

Summary of Findings

METHODOLOGY & OVERVIEW

Methodology

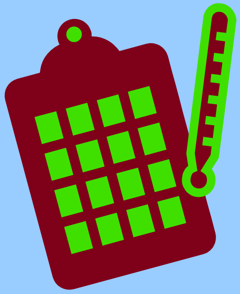
2,927 paper surveys sent via mail to residents in PDP's data base

An on-line version of survey was also available to residents on SMG website

"Reminder" postcard sent out to boost response rate

Data collected mid-August through late September

No $ incentive provided to residents



Study Results

413 surveys collected

413 out of 2,927 = 14.1% response rate

87 on-line + 326 paper = 413 total

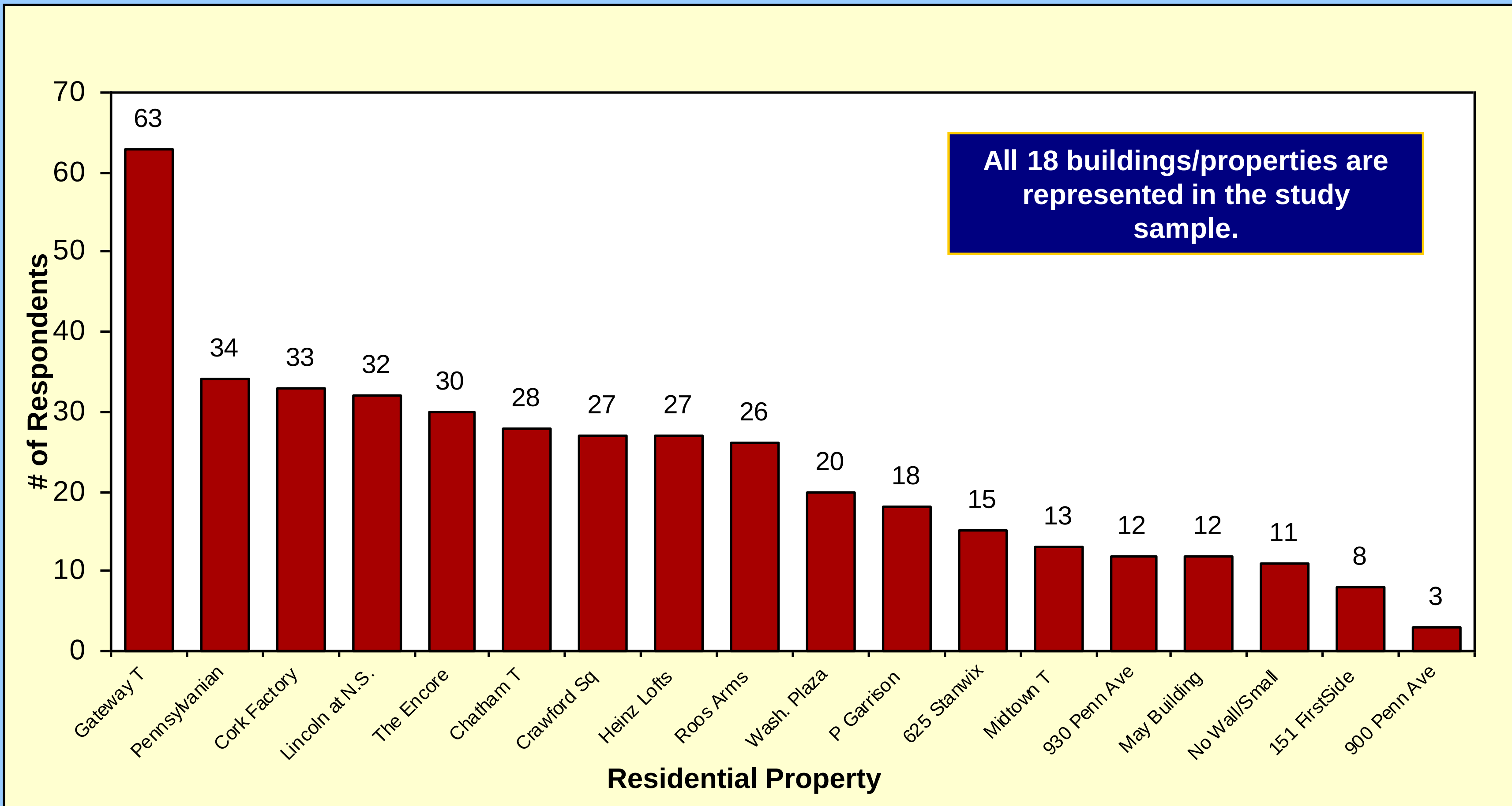
"Reminder" postcard boosted response by almost 120 surveys (very productive)

Surveyed residents represent an even mix of Downtown's buildings/properties

PROFILE OF RESIDENT SAMPLE

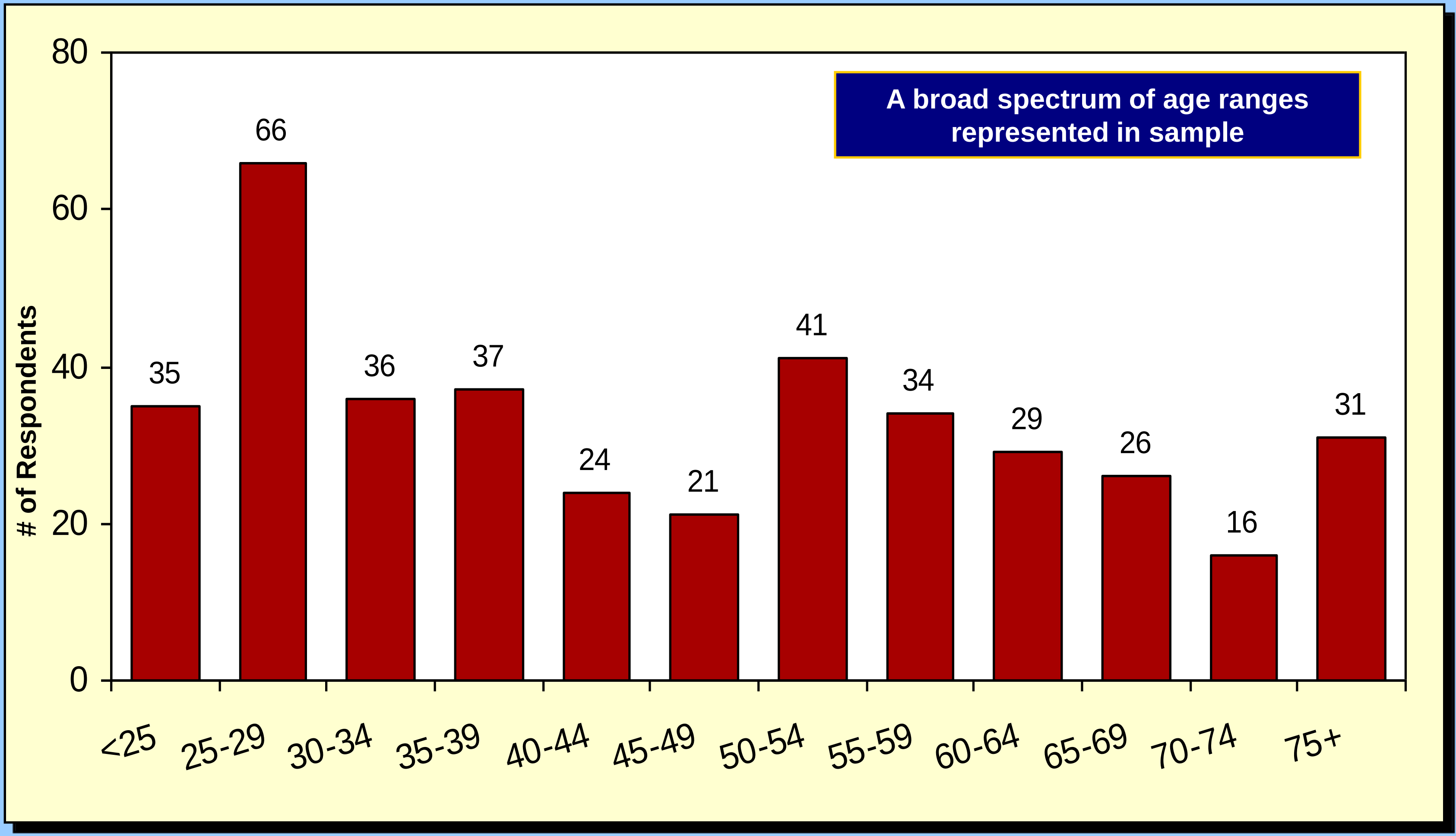
BUILDING / PROPERTY

Current Residences of Study Respondents



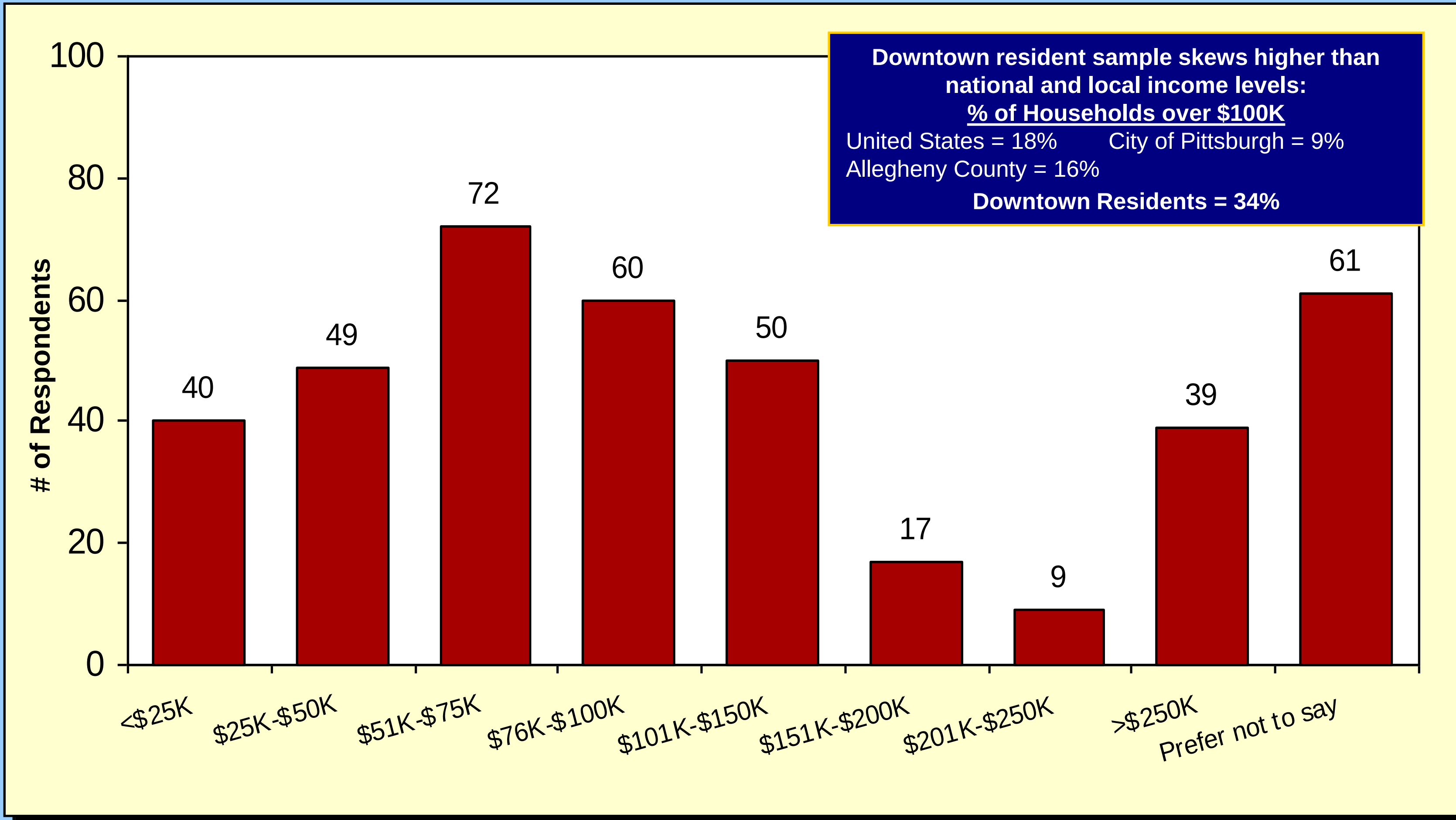
n = 412 (1 respondent did not want address to be known)

AGE OF RESIDENTS



n = 396

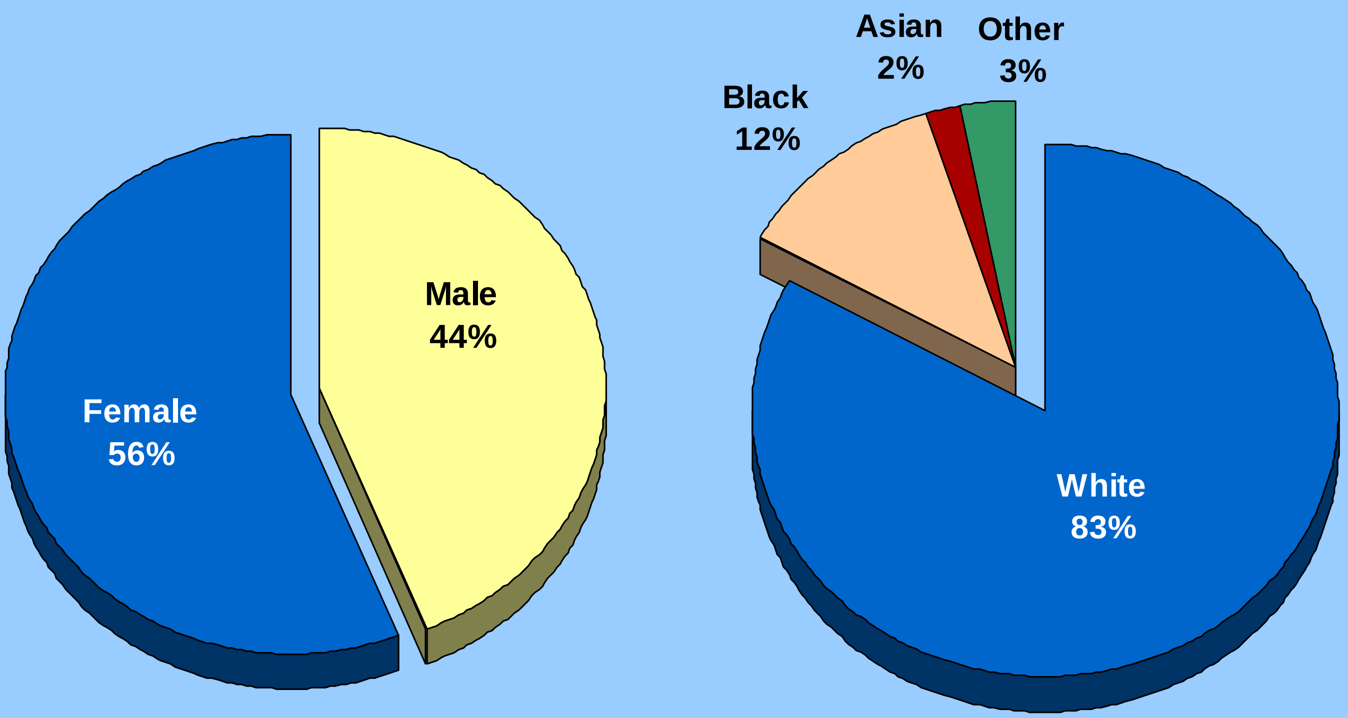
TOTAL ANNUAL HOUSEHOLD INCOME



n = 397

Source of HH income statistics for US, AGH County, and City of Pgh: 2006 American Community Survey (ACS) US Census Bureau

GENDER AND RACE



n = 399

n = 389

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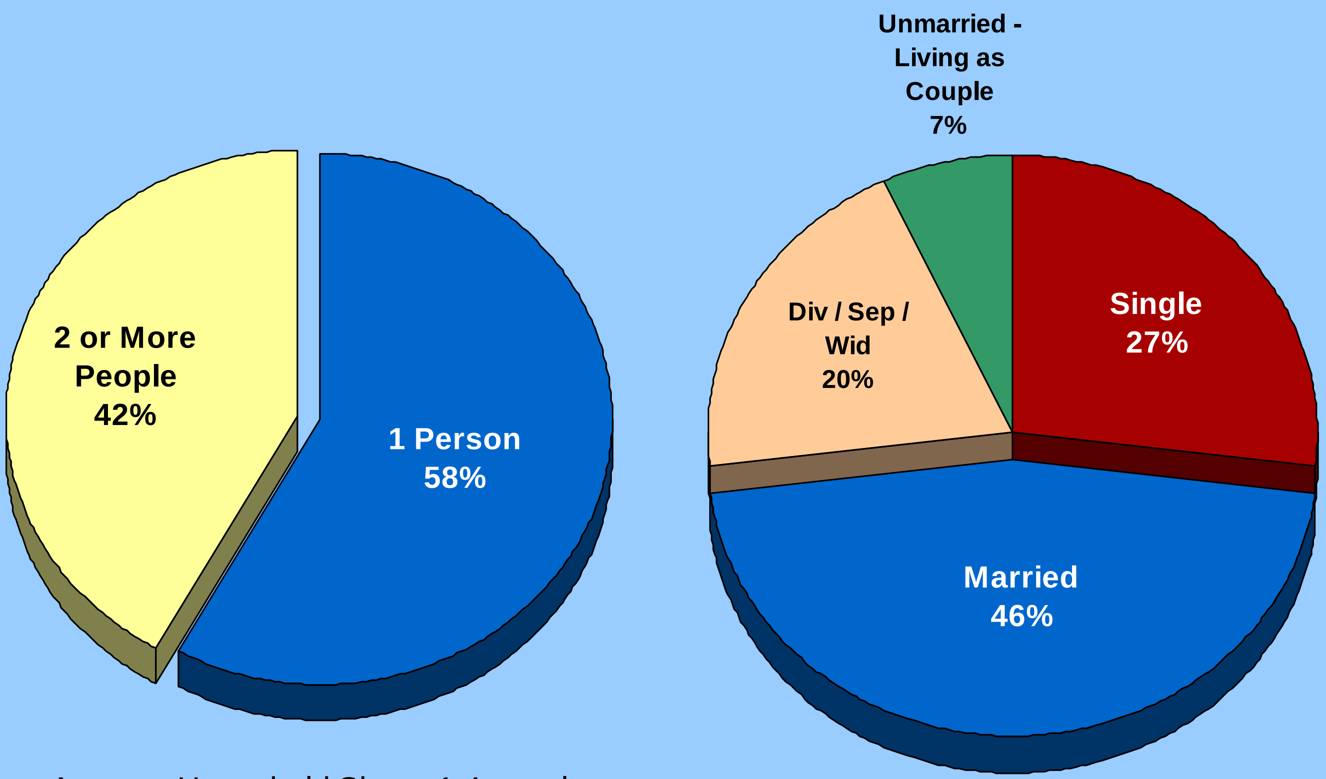
PITTSBURGH DOWNTOWN PARTNERSHIP

HOUSEHOLD SIZE & MARITAL STATUS



Average Household Size = 1.4 people

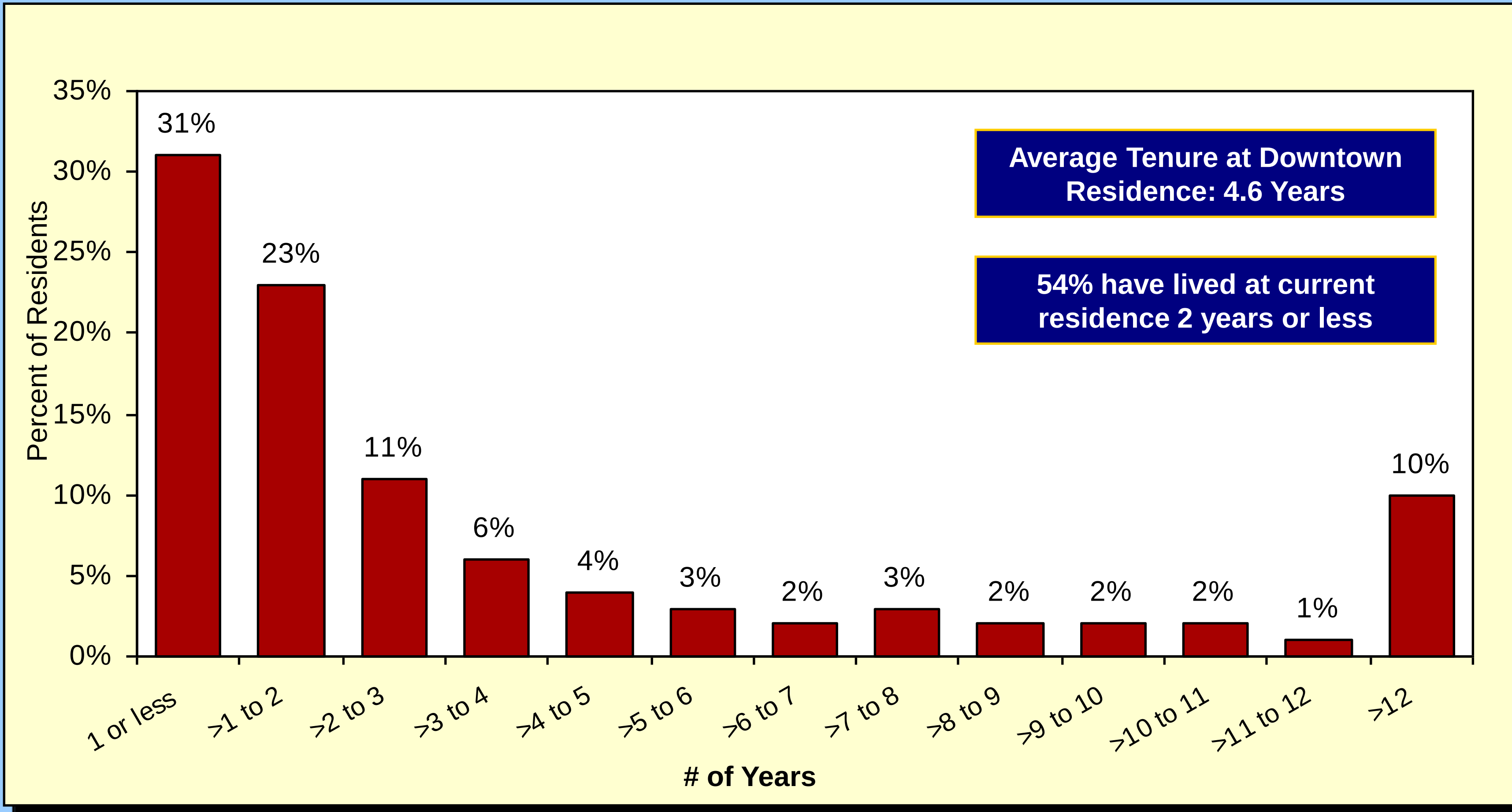
Just 3% of households have children

n = 401

n = 398

TENURE AT DOWNTOWN RESIDENCE

Number of Years Lived at Current Residence



Q1. How long have you lived at your current Downtown residence? (n = 413)

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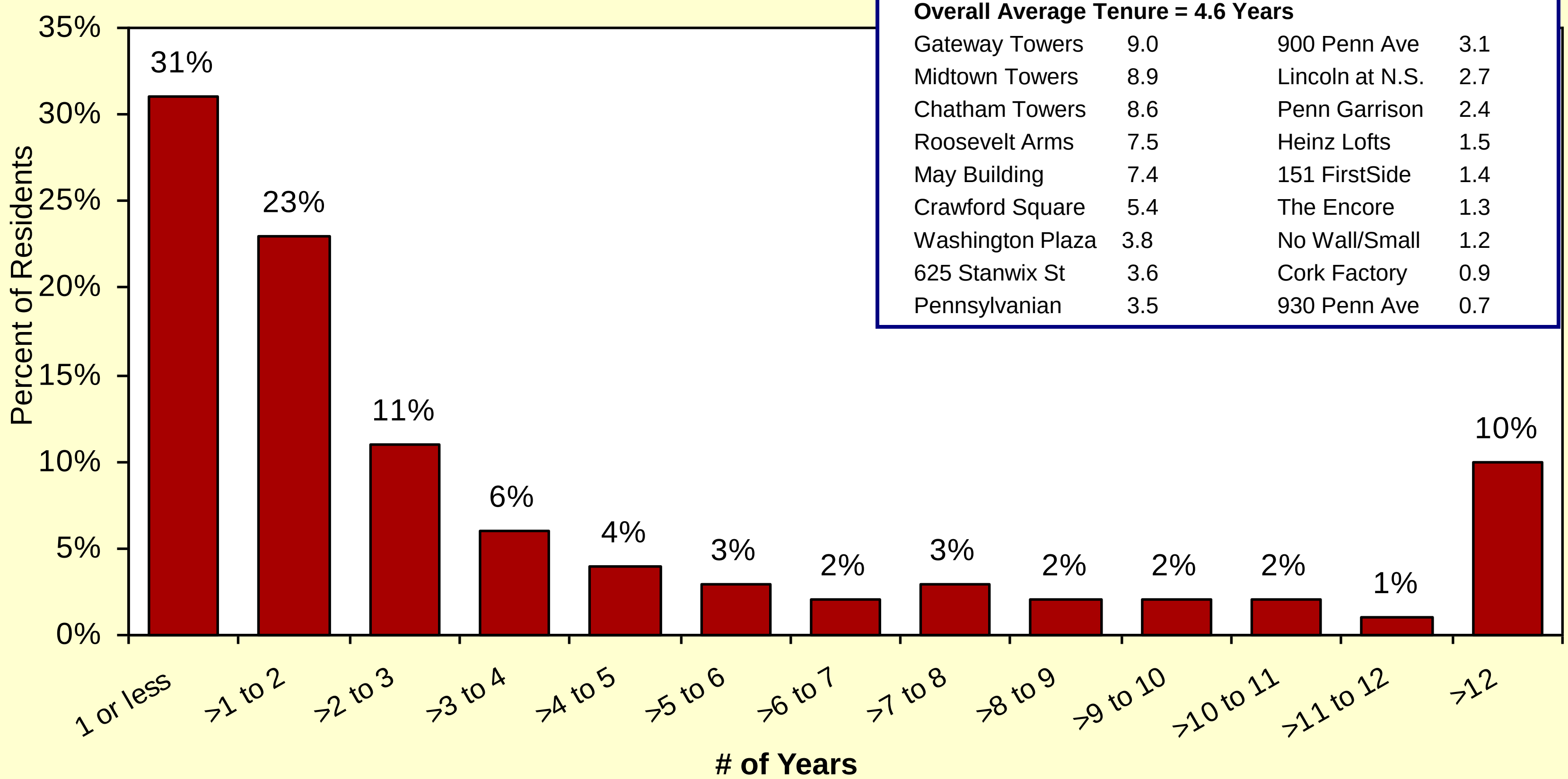
PITTSBURGH DOWNTOWN PARTNERSHIP

TENURE AT DOWNTOWN RESIDENCE

Number of Years Lived at Current Residence



Overall Average Tenure = 4.6 Years

Gateway Towers	9.0	900 Penn Ave	3.1
Midtown Towers	8.9	Lincoln at N.S.	2.7
Chatham Towers	8.6	Penn Garrison	2.4
Roosevelt Arms	7.5	Heinz Lofts	1.5
May Building	7.4	151 FirstSide	1.4
Crawford Square	5.4	The Encore	1.3
Washington Plaza	3.8	No Wall/Small	1.2
625 Stanwix St	3.6	Cork Factory	0.9
Pennsylvanian	3.5	930 Penn Ave	0.7

Q1. How long have you lived at your current Downtown residence? (n = 413)

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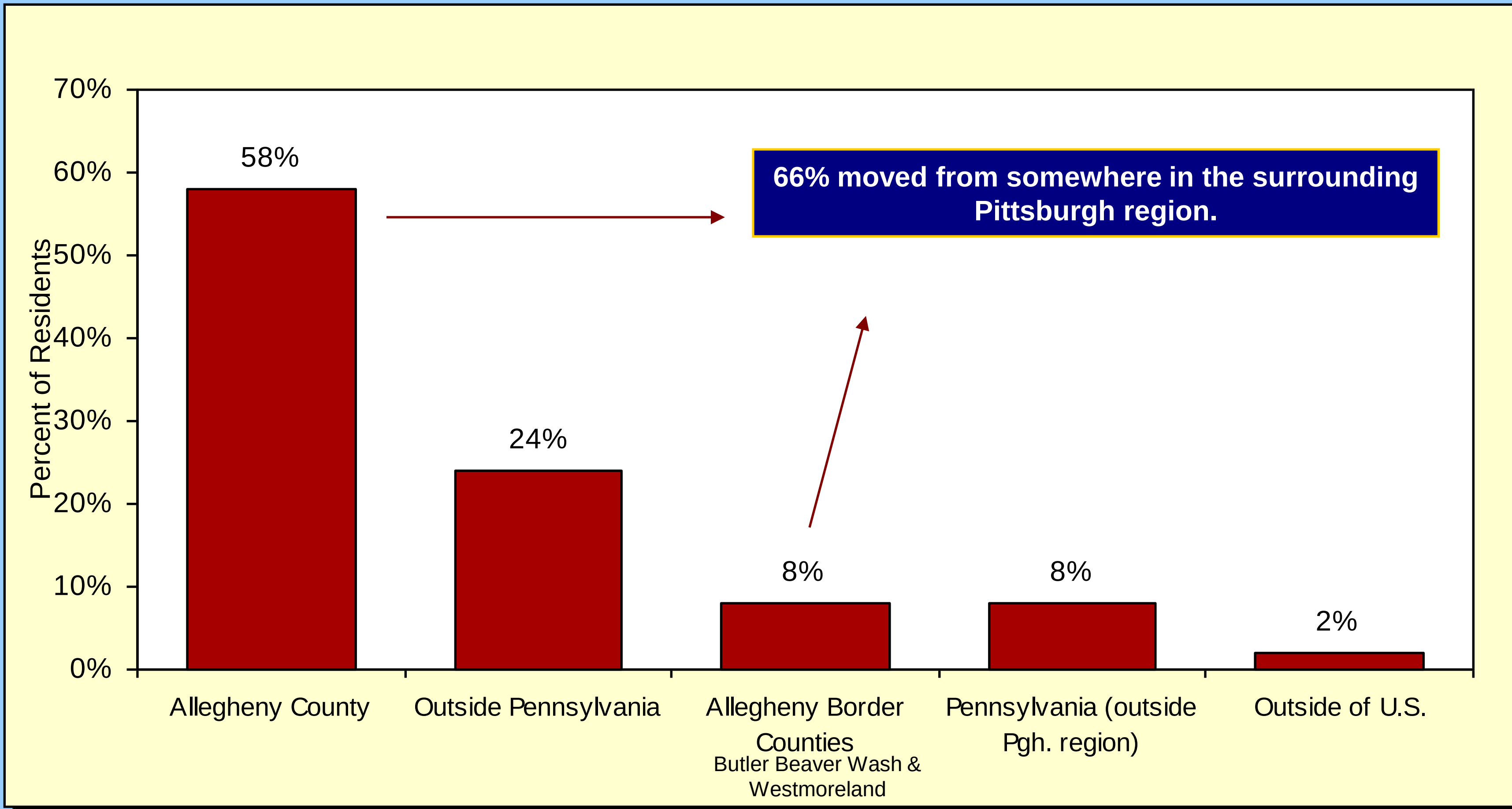
PITTSBURGH DOWNTOWN PARTNERSHIP

PREVIOUS RESIDENCE

Location of Residence Prior to Moving Downtown



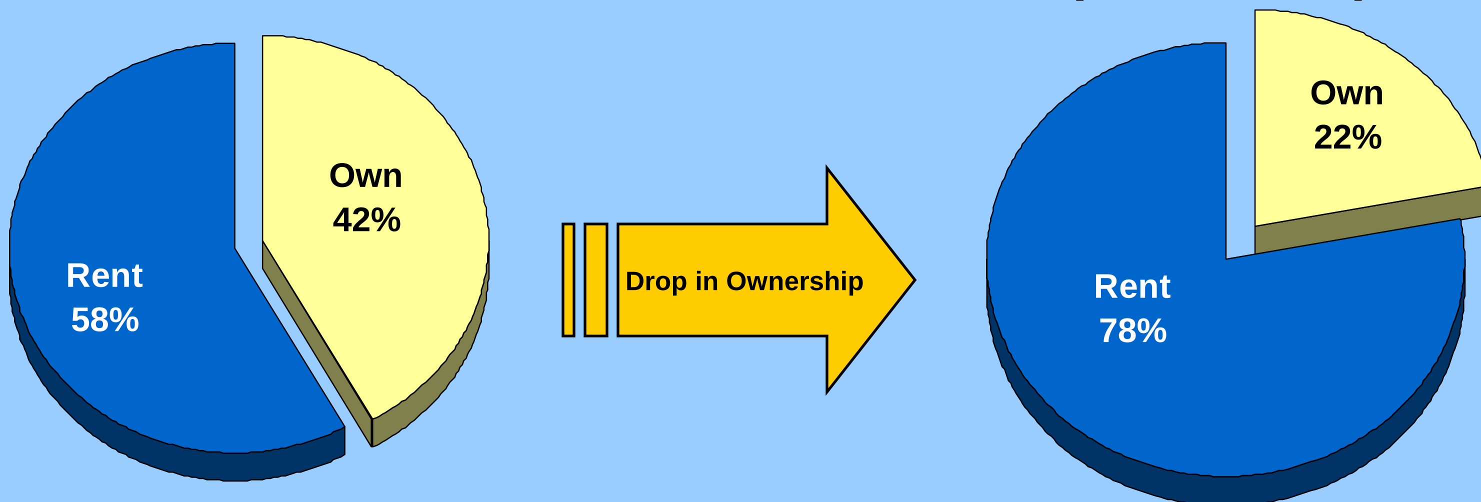
Q2. Where did you last live prior to moving to your current Downtown residence? (n = 408)

OWNERSHIP STATUS

Rent versus Own

Prior Residence

Current Residence (Downtown)



A higher "renter" status accompanied the move to Downtown.
"Renter" up 20 percentage points, "Owner" down 20 percentage points.

Q3. Which best describes your status at your prior residence? (n=404)

Q33. Do you own or rent at your current residence? (n=397)

SUMMARY OF DEMOGRAPHICS

GENDER	n	%
Male	**176**	**44%**
Female	**223**	**56%**
Total	**399**	**100%**
MARITAL STATUS	n	%
Married	106	26.6%
Single	181	45.5%
Divorced/Widowed/ Separated	81	20.4%
Unmarried living as couple	30	7.5%
RACE/ETHNICITY	n	%
White	**325**	**83%**
Black	**45**	**12%**
Asian	**8**	**2%**
Other	**11**	**3%**
Total	**389**	**100%**

AGE	n	%
Less than 25	**35**	**9%**
25 – 29	**66**	**17%**
30 – 34	**36**	**9%**
35 – 39	**37**	**9%**
40 – 44	**24**	**6%**
45 – 49	**21**	**5%**
50 – 54	**41**	**10%**
55 – 59	**34**	**9%**
60 – 64	**29**	**7%**
65 – 69	**26**	**7%**
70 – 74	**16**	**4%**
75+	**31**	**8%**
Total	**396**	**100%**
Downtown HH Size	n	**Average**
Average HH size	**401**	**1.4 people**

SUMMARY OF DEMOGRAPHICS

INCOME	n	%
<$25K	40	10%
$25K-$50K	49	12%
$51K-$75K	72	18%
$76K-$100K	60	15%
$101K-$150K	50	13%
$151K-$200K	17	4%
$201K-$250K	9	2%
>$250K	39	10%
Prefer Not to Say	61	16%
Total	397	100%

PET OWNERSHIP	n	%
No Pets	295	74%
Own Dogs	50	13%
Own Cats	56	14%
Own Other Pets	8	2%
Average # of Dogs	50	1.04
Average # of Cats	56	1.46
Average # of Other Pets	8	No responses
“Other” Types of Pets	Birds, Fish, Rabbit	

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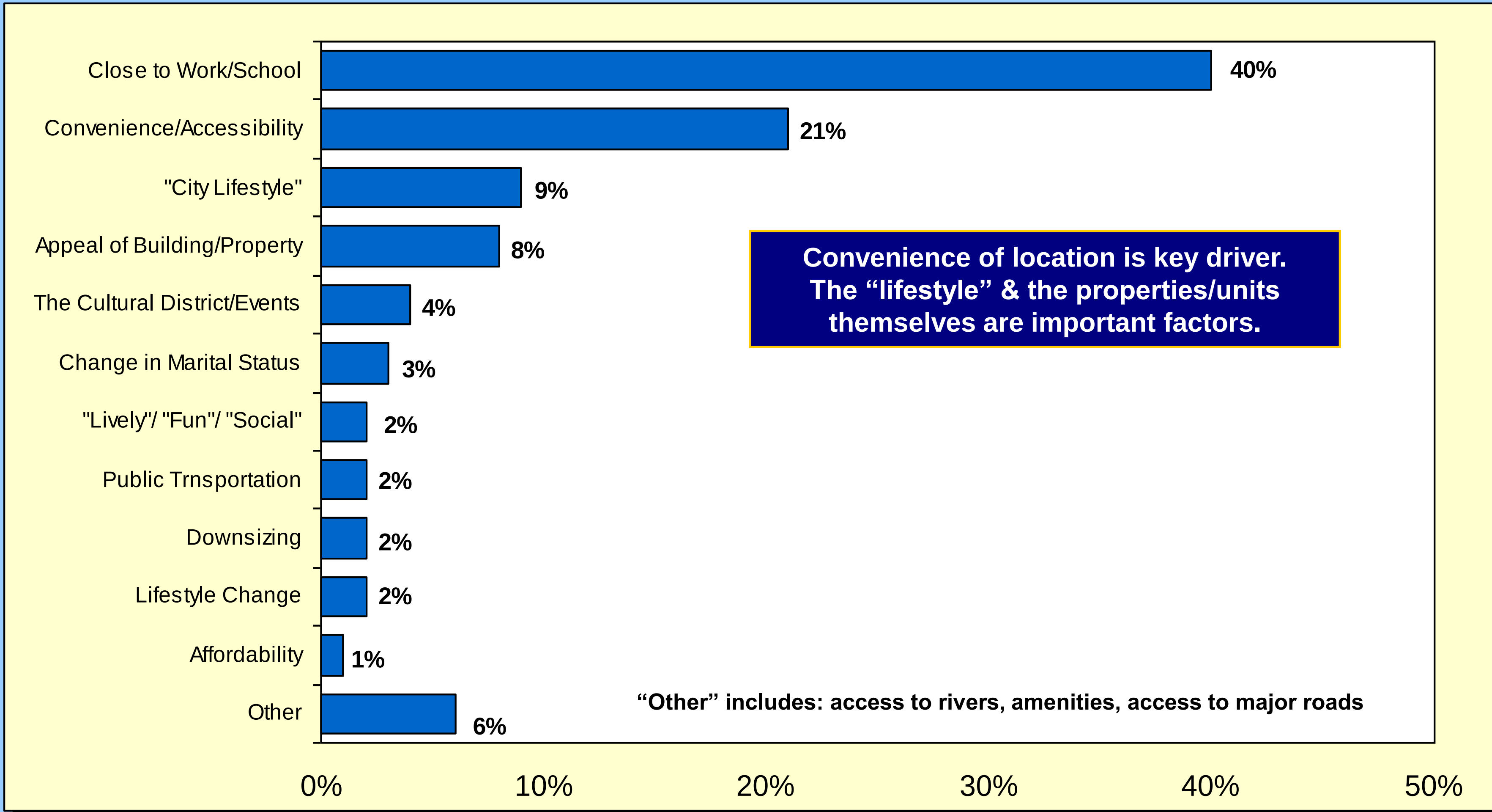
PITTSBURGH DOWNTOWN PARTNERSHIP

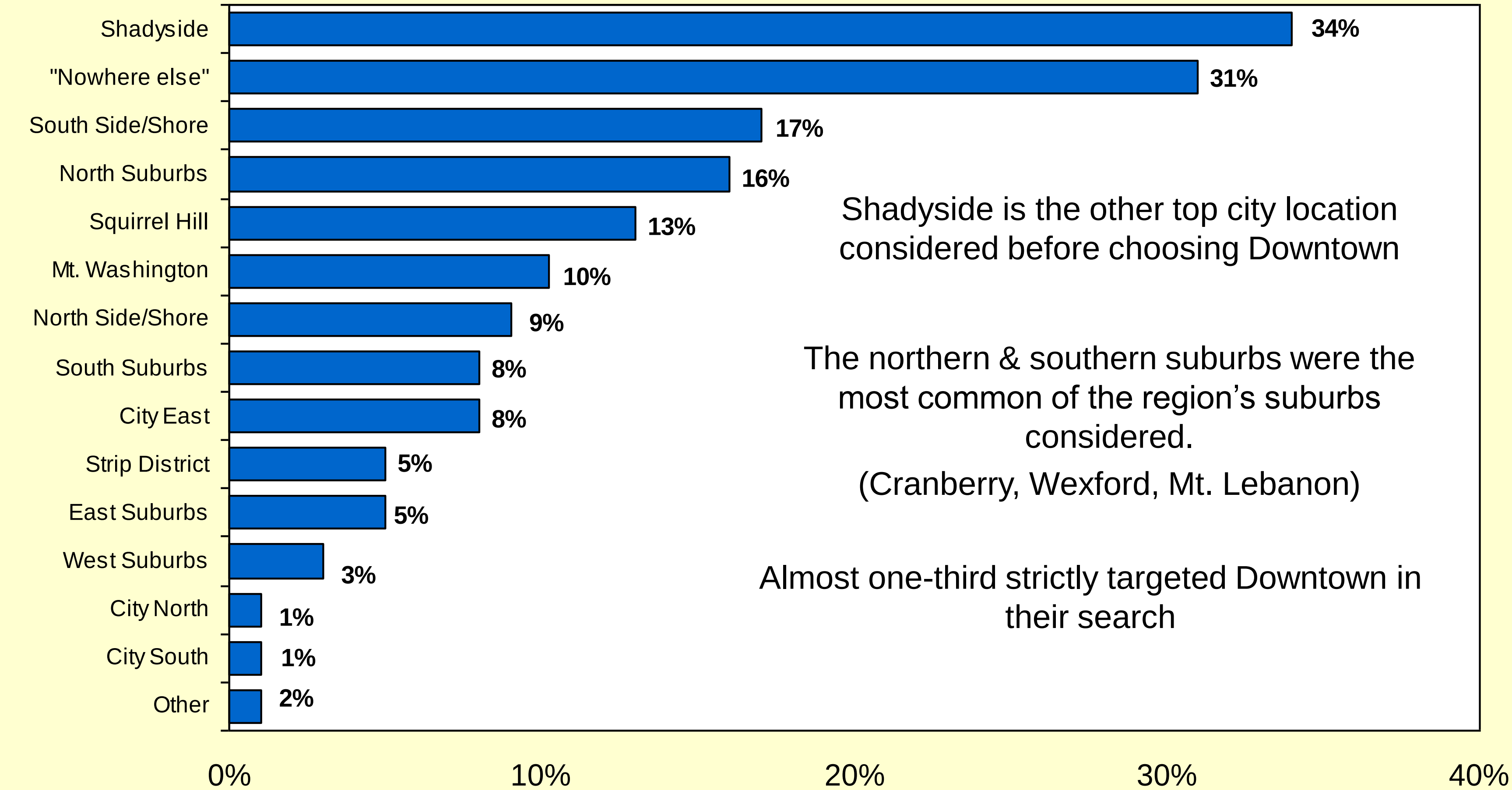
DECISION TO MOVE DOWNTOWN

PRIMARY REASON FOR MOVING DOWNTOWN



Q4. What was the primary reason you chose to live Downtown? (n=402)

OTHER LOCATIONS CONSIDERED IN HOUSING SEARCH



Q5. Prior to moving Downtown, what communities were included in your housing search? (n=374)

Q5 is a multiple response question. 374 people provided 645 answers. The above chart reflects the % of people mentioning each location.

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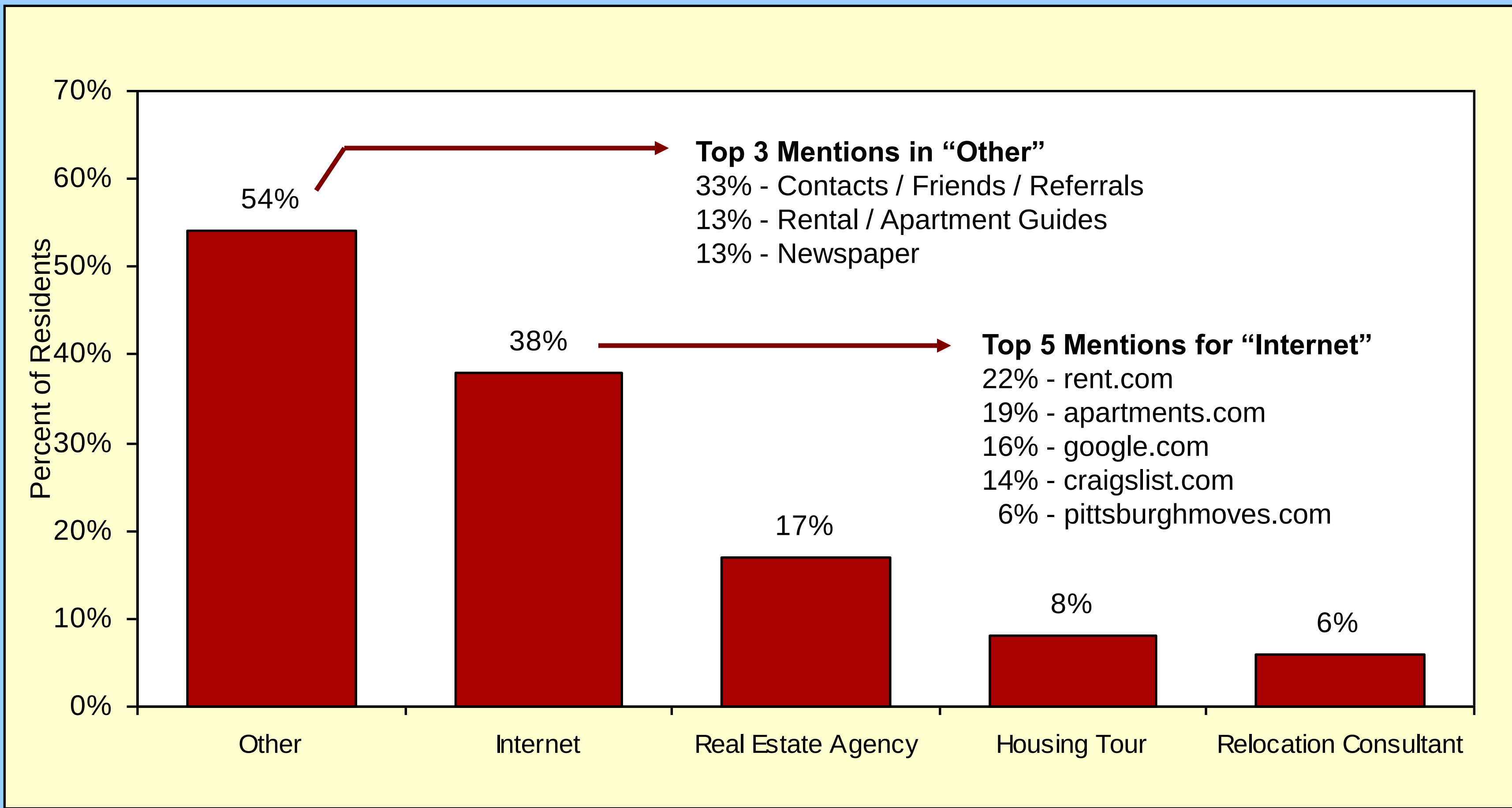
RESOURCES USED IN HOUSING SEARCH



Q6. Which resources did you use to find your current property/building? (n = 404)

Q6 is a multiple response question. 404 people provided 494 answers. The above chart reflects the % of people mentioning each resource.

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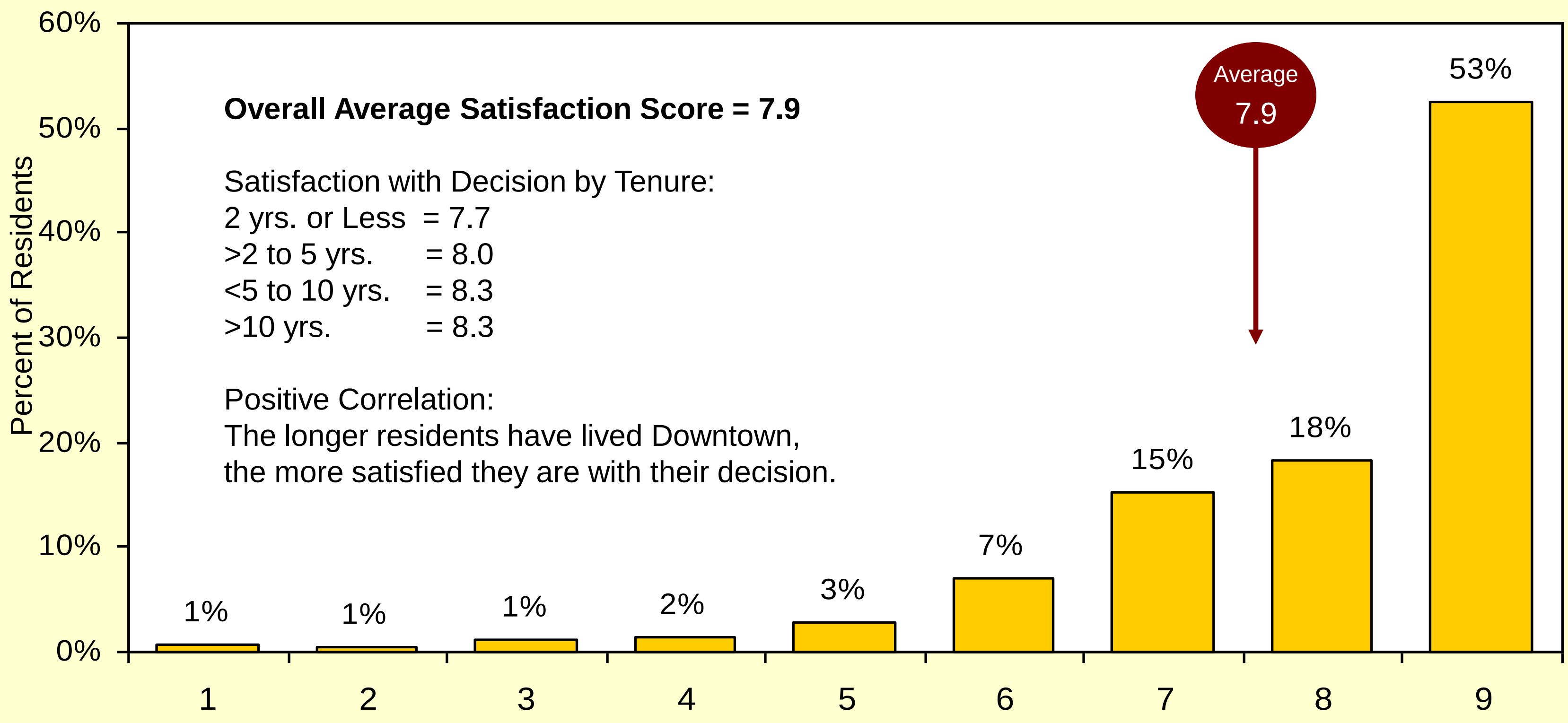
SATISFACTION WITH DOWNTOWN LIVING

SATISFACTION WITH DECISION TO MOVE DOWNTOWN

1 = Not satisfied at all; 9 = Very satisfied



Q9. How satisfied are you with your decision to live in Downtown? (n = 411)

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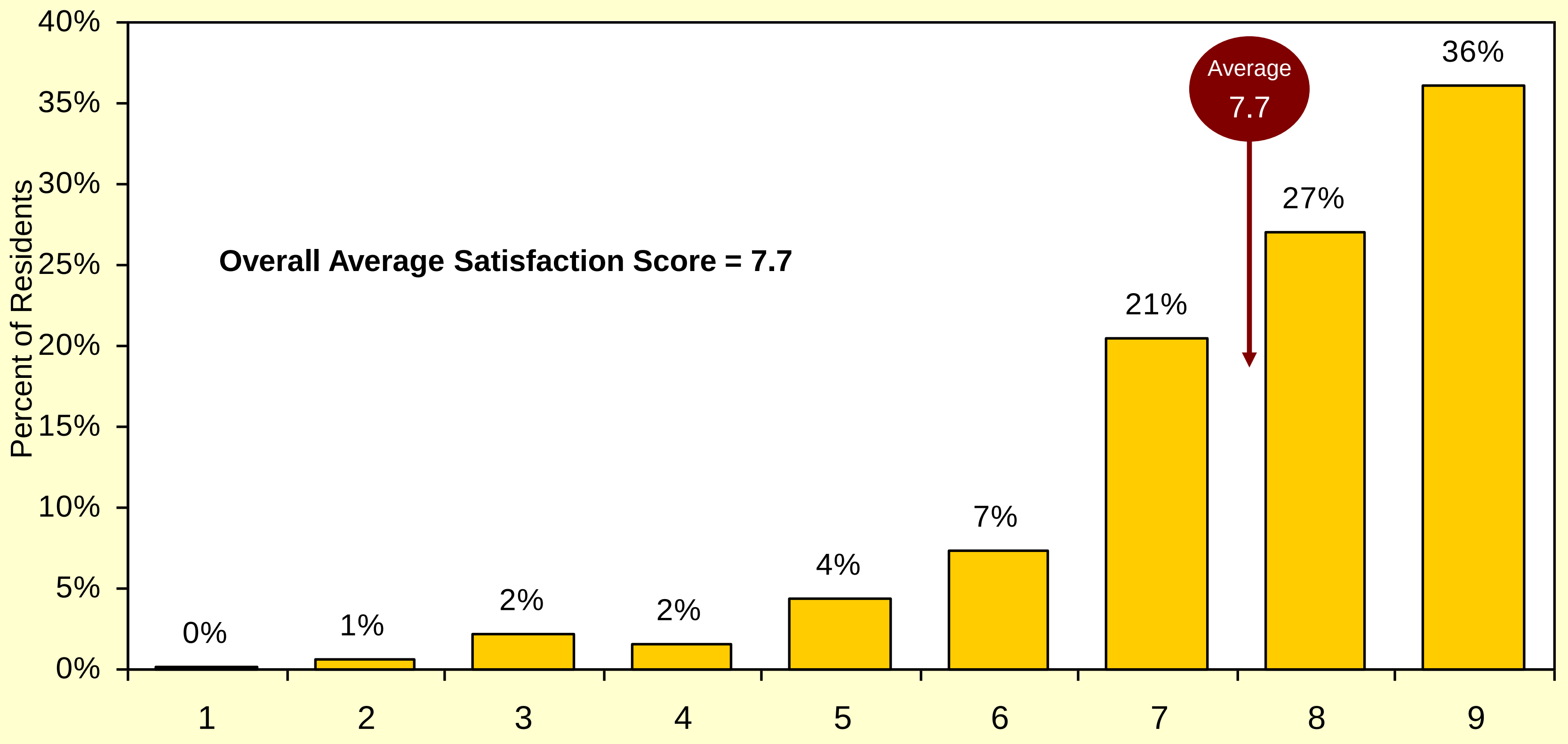
PITTSBURGH DOWNTOWN PARTNERSHIP

SATISFACTION WITH DOWNTOWN RESIDENCE

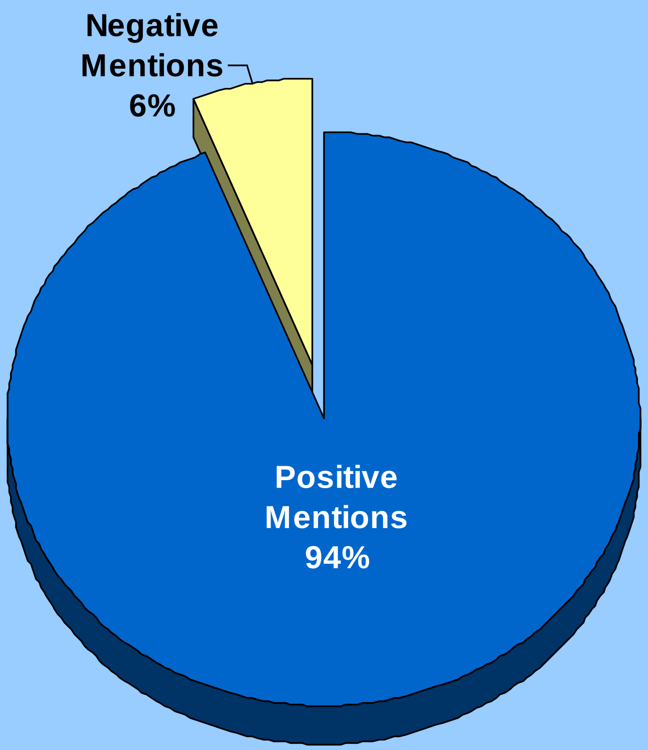
1 = Not satisfied at all; 9 = Very satisfied



Q8. How satisfied are you with your property/building choice? (n = 410)

FACTORS THAT IMPACT THE QUALITY OF "DOWNTOWN LIVING"

Positive & Negative Factors Cited by Residents



1,355 "quality of life" factors were cited by the Downtown residents. 1,275 or 94% of these answers were "positive" or favorable. Just 6% of the factors reference "negative" or unfavorable issues.

<u>Positive Factors Cited Most Often (94%):</u>

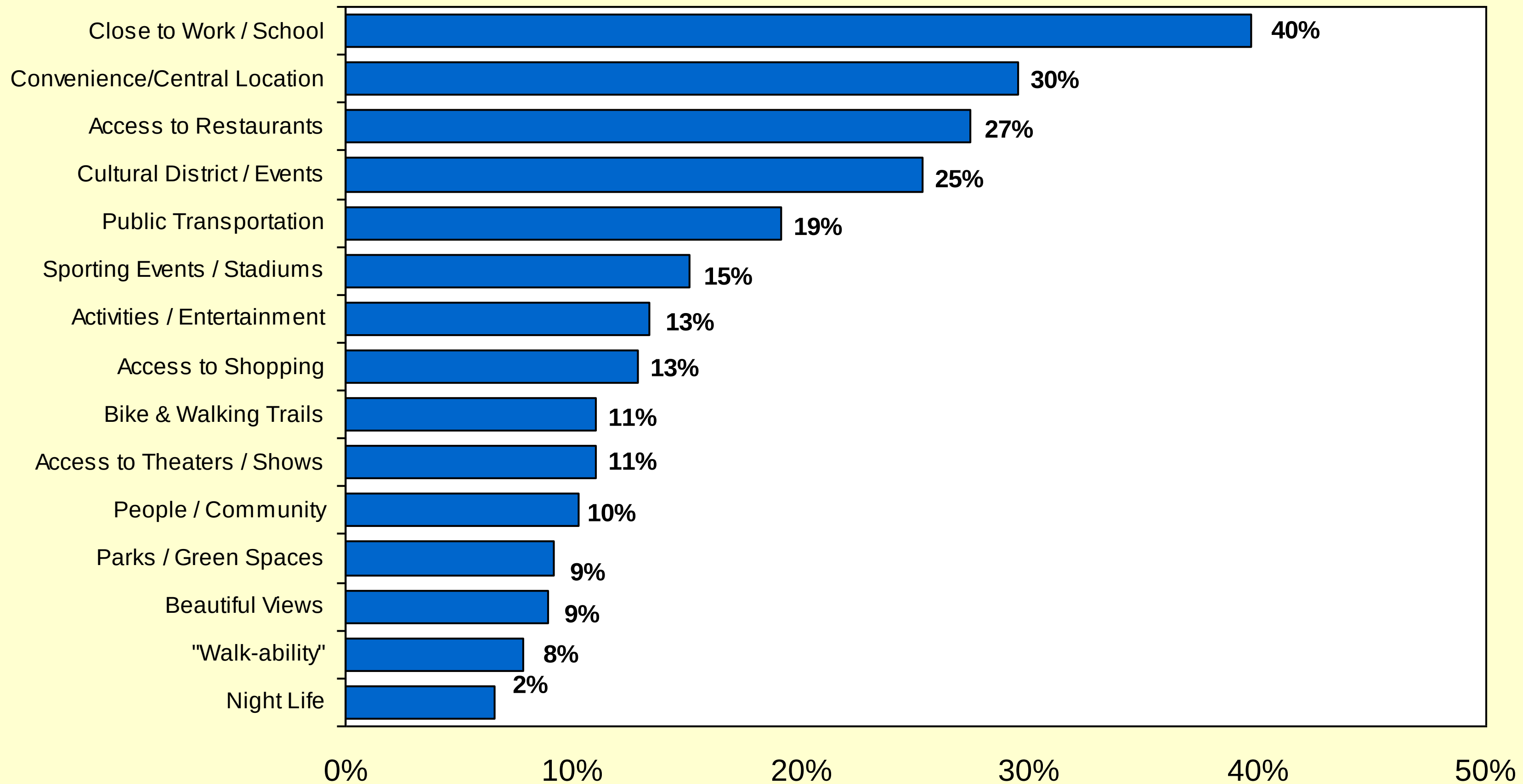
- Close to work or school
- Convenience / central location
- Access to restaurants
- Proximity to Cultural District / Events / Arts

<u>Negative Factors Cited Most Often (6%):</u>

- Safety / Security
- Lack of Grocery Stores & Retail
- Nothing is open at night – need to stay open
- Noise / Parking / No taxis / High costs

Q10. Which aspects of Downtown living have the greatest overall impact on your quality of life (livability) as a Downtown resident? (n = 383)

POSITIVE FACTORS IMPACTING THE QUALITY OF "DOWNTOWN LIVING"



Q10. Which aspects of Downtown living have the greatest overall impact on your quality of life (livability) as a Downtown resident? (n = 1,275 responses)

Q10 is a multiple response question. 383 people provided 1,275 answers. The above chart reflects the % of people mentioning each factor.

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PITTSBURGH DOWNTOWN PARTNERSHIP

NEGATIVE FACTORS IMPACTING THE QUALITYOF "DOWNTOWN LIVING"

SAFETY is the primary factor.

It accounts for 33 of 80 responses.

- Safety / Security (33)
- Noise (3)
- Costs (high) (3)
- (need) more & safer bus routes from Oakland to Mellon arena area
- (need) places for guests to park for free
- accessibility - need to not have Pgh PD block access to apartments
- businesses that stay open
- cab service/parking
- Develop "retail services" w/ business hours catering to a residential com
- Downtown construction and congestion
- DT is dead at night; everything closes
- Frustrated with the smokers everywhere
- full use of buildings
- grocery store at reasonable pricing
- Grocery Stores (and operation hours of them)
- lack of weekend life
- loud noise, especially at night
- no shopping for food in area
- not closing streets to access building
- safety - I wouldn't feel safe walking around at night
- shopping (limited at this time)
- stuff needs to be open late and on weekends

- There is no Grocery Store!!!!
- $ parking
- air pollution
- black on white crime
- City closing the one road that leads to
- Develop retail shopping for a variety of life-
- styles w/ business hours catering to residents
- we need a grocery store with regular prices
- Game Events (added crowds/ticket sellers)
- have to drive to N Hills/Fox Chap for groceries
- lack of grocery shopping
- lack of police patrol, especially after
- more access to taxi service
- Parking difficulties. It's Expensive.
- Construction
- garbage everywhere
- state or PennDot doesn't notify road closures
- street bums, loiterers
- punks & vagrants on street
- coal dust
- taxes
- better property management

Q10. Which aspects of Downtown living have the greatest overall impact on your quality of life (livability) as a Downtown resident? (n = 80 responses)

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PITTSBURGH DOWNTOWN PARTNERSHIP

SHOPPING BEHAVIOR

CATEGORIES SHOPPED BY DOWNTOWN RESIDENTS

Residents asked where they shop for 23 product/service categories

Do you shop in Downtown? (yes/no) Do you shop in suburbs? (yes/no)

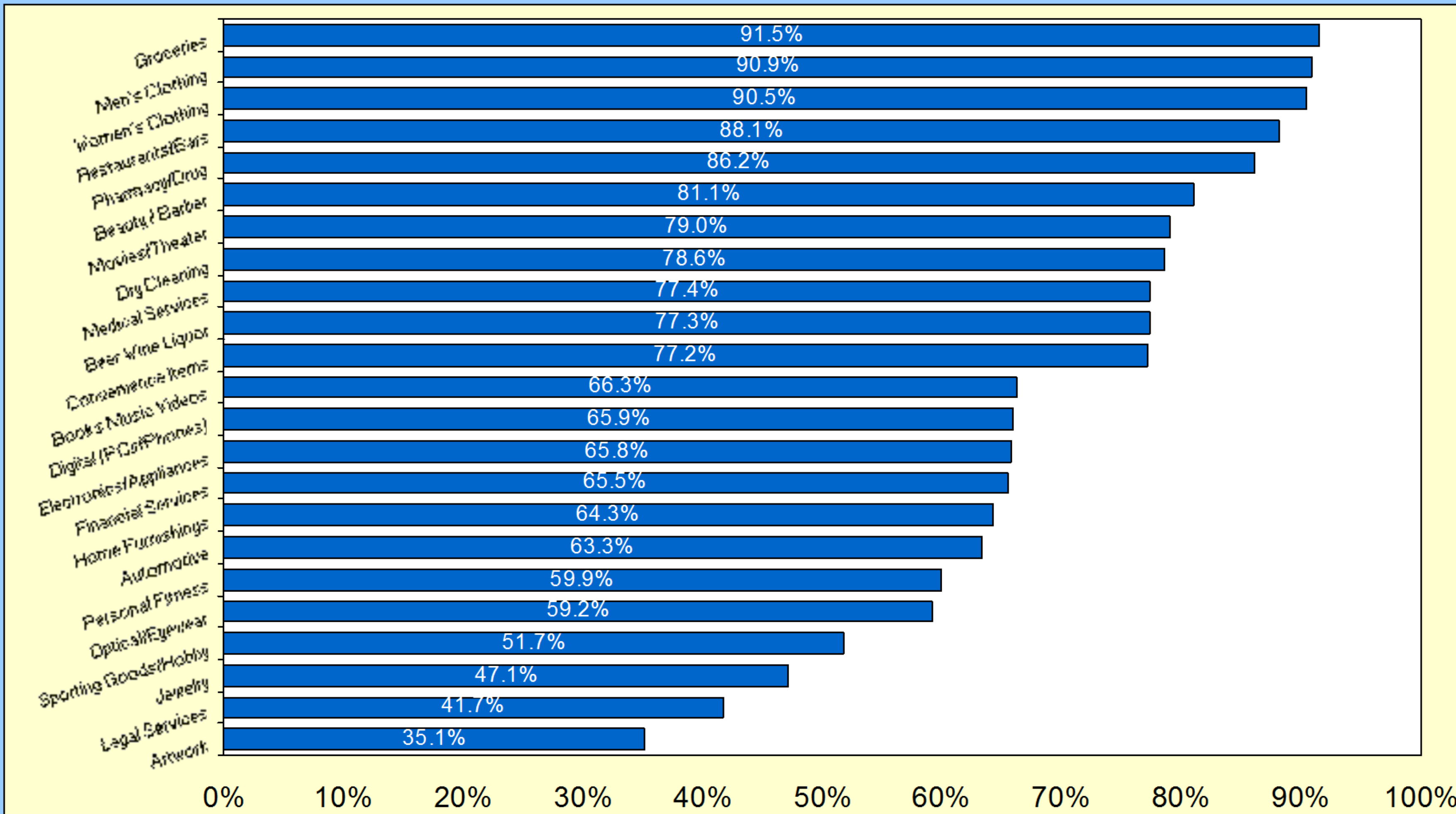
- Restaurants / Bars
- Pharmacy / Drug
- Convenience Store item
- Men's Clothing
- Financial Services
- Personal Fitness
- Movies / Theater
- Groceries

- Beauty / Barber
- Dry Cleaning
- Women's Clothing.
- Beer Wine Liquor
- Optical / Eyewear
- Legal Service
- Jewelry
- Artwork

- Electronics/Appliances
- Home Furnishing/Furniture
- Automotive
- Books / Music / Video
- Digital (PCs, Phones)
- Medical Services
- Sporting Goods / Hobby

PERCENTAGE WHO SHOP EACH CATEGORY

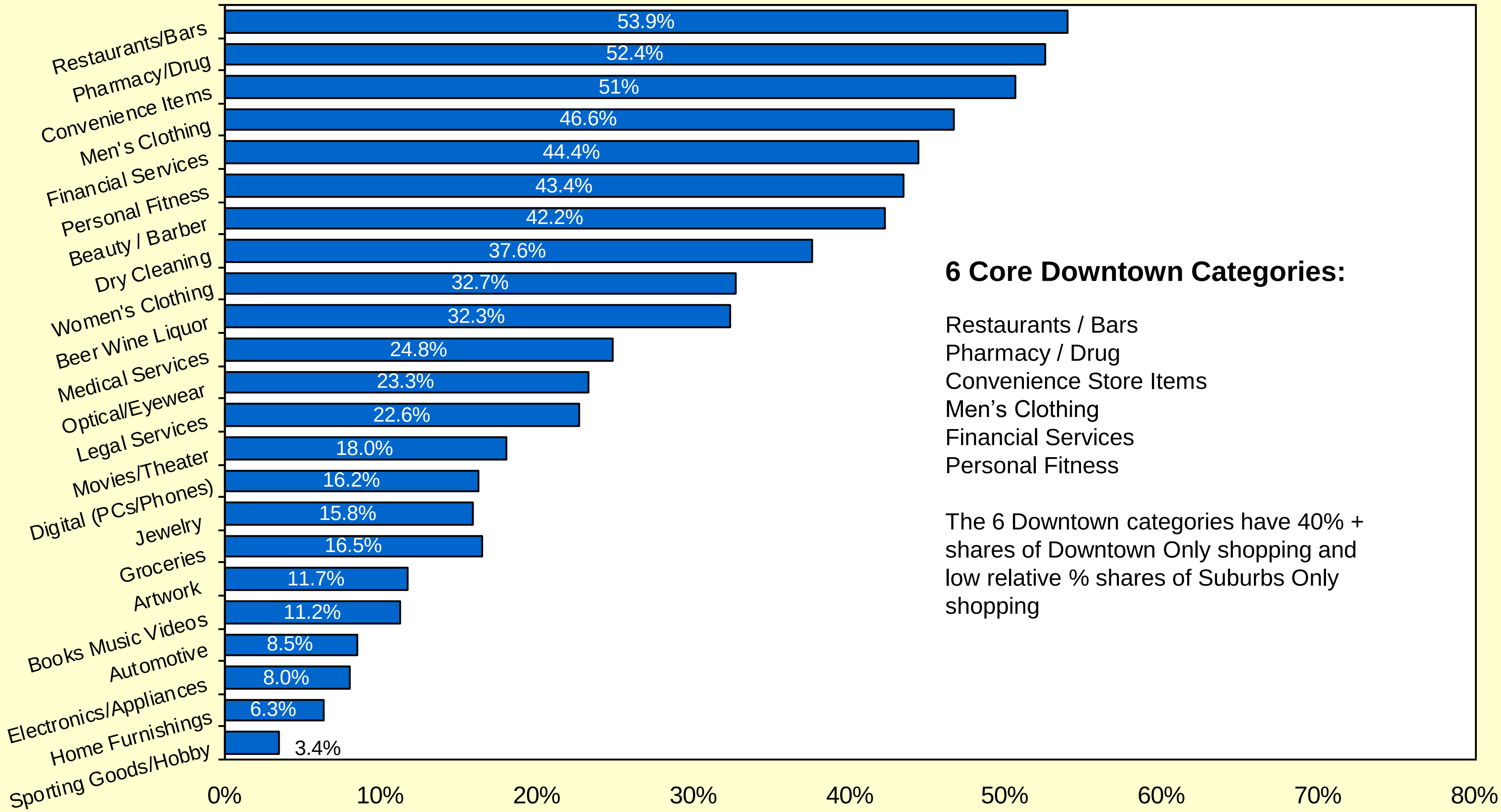
Percentage of Residents



Q11. Where do you shop for the following goods and services? (n = varies by product/service)

SHOP ONLY IN DOWNTOWN

% of Residents Who Shop Exclusively in Downtown for Category



6 Core Downtown Categories:

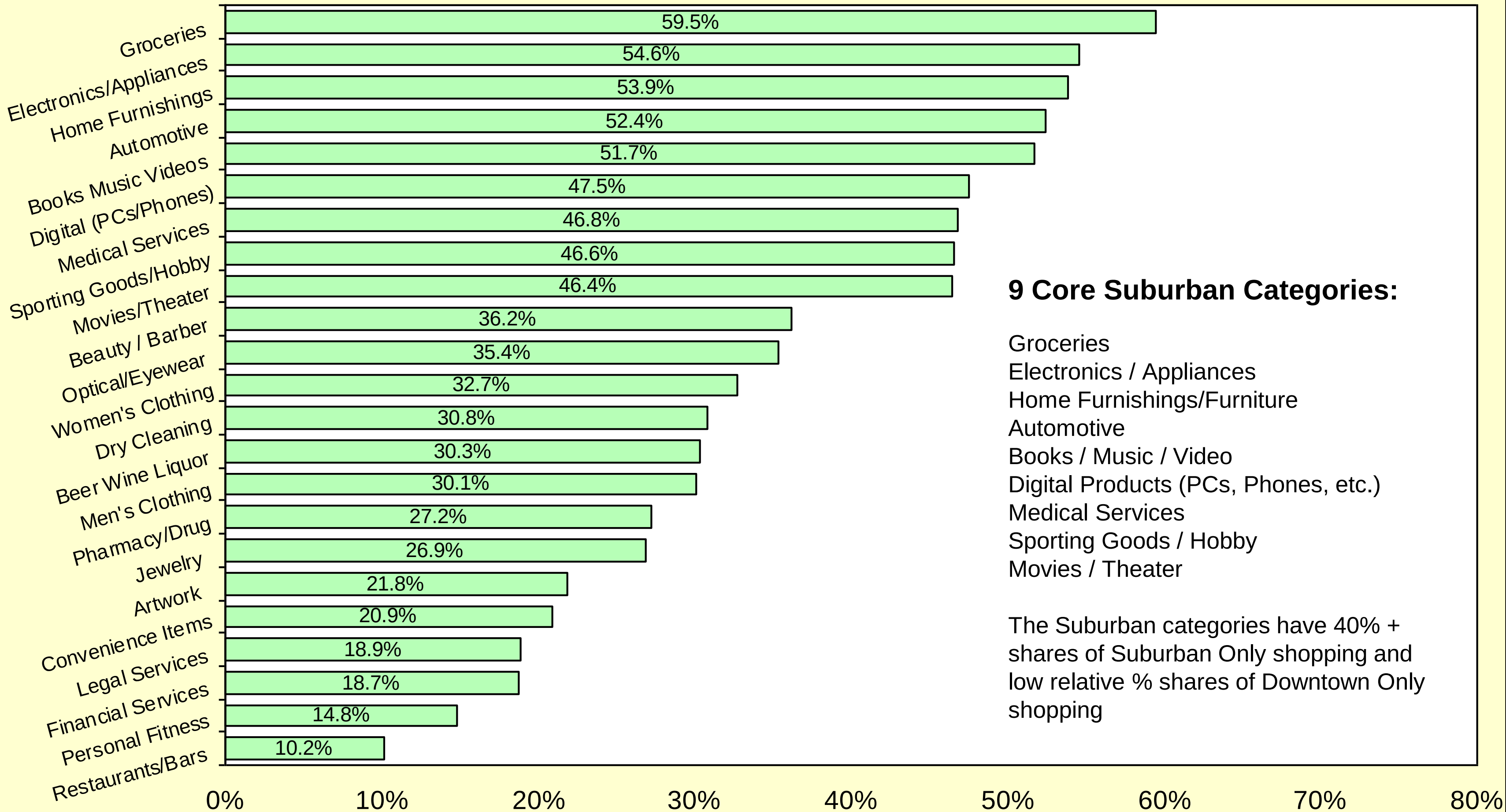
Restaurants / Bars
Pharmacy / Drug
Convenience Store Items
Men’s Clothing
Financial Services
Personal Fitness

The 6 Downtown categories have 40% + shares of Downtown Only shopping and low relative % shares of Suburbs Only shopping

Q11. Where do you shop for the following goods and services? (n = varies by product/service)

SHOP ONLY IN SUBURBS

% of Residents Who Shop Exclusively in Suburbs for Category



9 Core Suburban Categories:

Groceries
Electronics / Appliances
Home Furnishings/Furniture
Automotive
Books / Music / Video
Digital Products (PCs, Phones, etc.)
Medical Services
Sporting Goods / Hobby
Movies / Theater

The Suburban categories have 40% + shares of Suburban Only shopping and low relative % shares of Downtown Only shopping

Q11. Where do you shop for the following goods and services? (n = varies by product/service)

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PITTSBURGH DOWNTOWN PARTNERSHIP

SHOPPING CATEGORY SUMMARY

CORE DOWNTOWN - 6

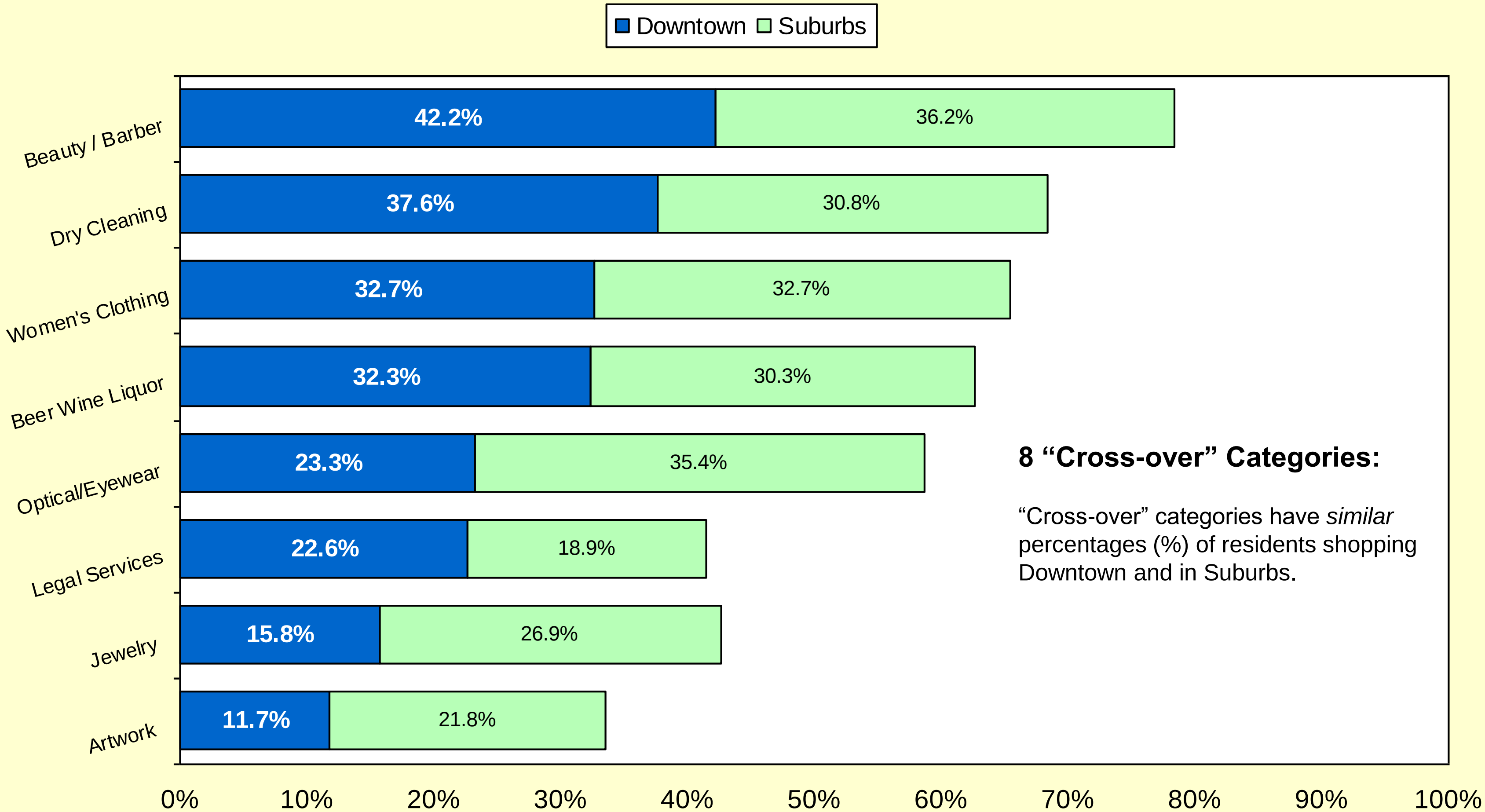
- Restaurants / Bars
- Pharmacy / Drug
- Convenience Store item
- Men's Clothing
- Financial Services
- Personal Fitness

CORE SUBURBAN - 9

- Groceries
- Electronics/Appliances
- Home Furnishing/Furniture
- Automotive
- Books / Music / Video
- Digital (PCs, Phones)
- Medical Services
- Sporting Goods / Hobby
- Movies / Theater

"CROSS-OVER" CATEGORIES

Categories Where Both Venues Are Equally Popular with Residents



8 "Cross-over" Categories:

"Cross-over" categories have *similar* percentages (%) of residents shopping Downtown and in Suburbs.

Q11. Where do you shop for the following goods and services? (n = varies by product/service)

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PITTSBURGH DOWNTOWN PARTNERSHIP

SHOPPING CATEGORY SUMMARY

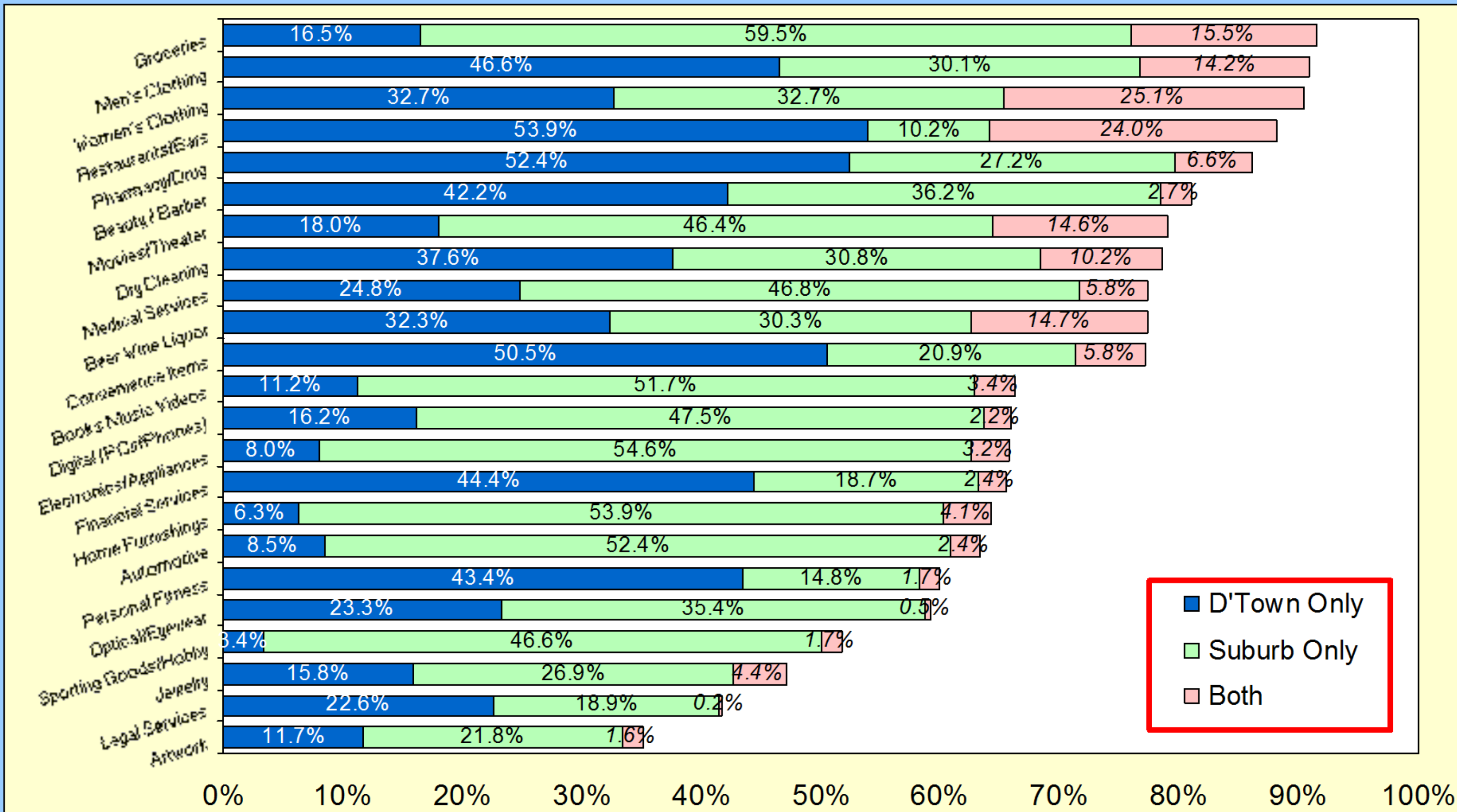
CORE DOWNTOWN – 6
- Restaurants / Bars
- Pharmacy / Drug
- Convenience Store item
- Men's Clothing
- Financial Services
- Personal Fitness

"CROSS-OVER" – 8
- Beauty / Barber
- Dry Cleaning
- Women's Clothing.
- Beer Wine Liquor
- Optical / Eyewear
- Legal Service
- Jewelry
- Artwork

CORE SUBURBAN - 9
- Groceries
- Electronics/Appliances
- Home Furnishing/Furniture
- Automotive
- Books / Music / Video
- Digital (PCs, Phones)
- Medical Services
- Sporting Goods / Hobby
- Movies / Theater

SHOPPING/SPENDING SUMMARY

Total Percentage of Residents



Q11. Where do you shop for the following goods and services? (n =)

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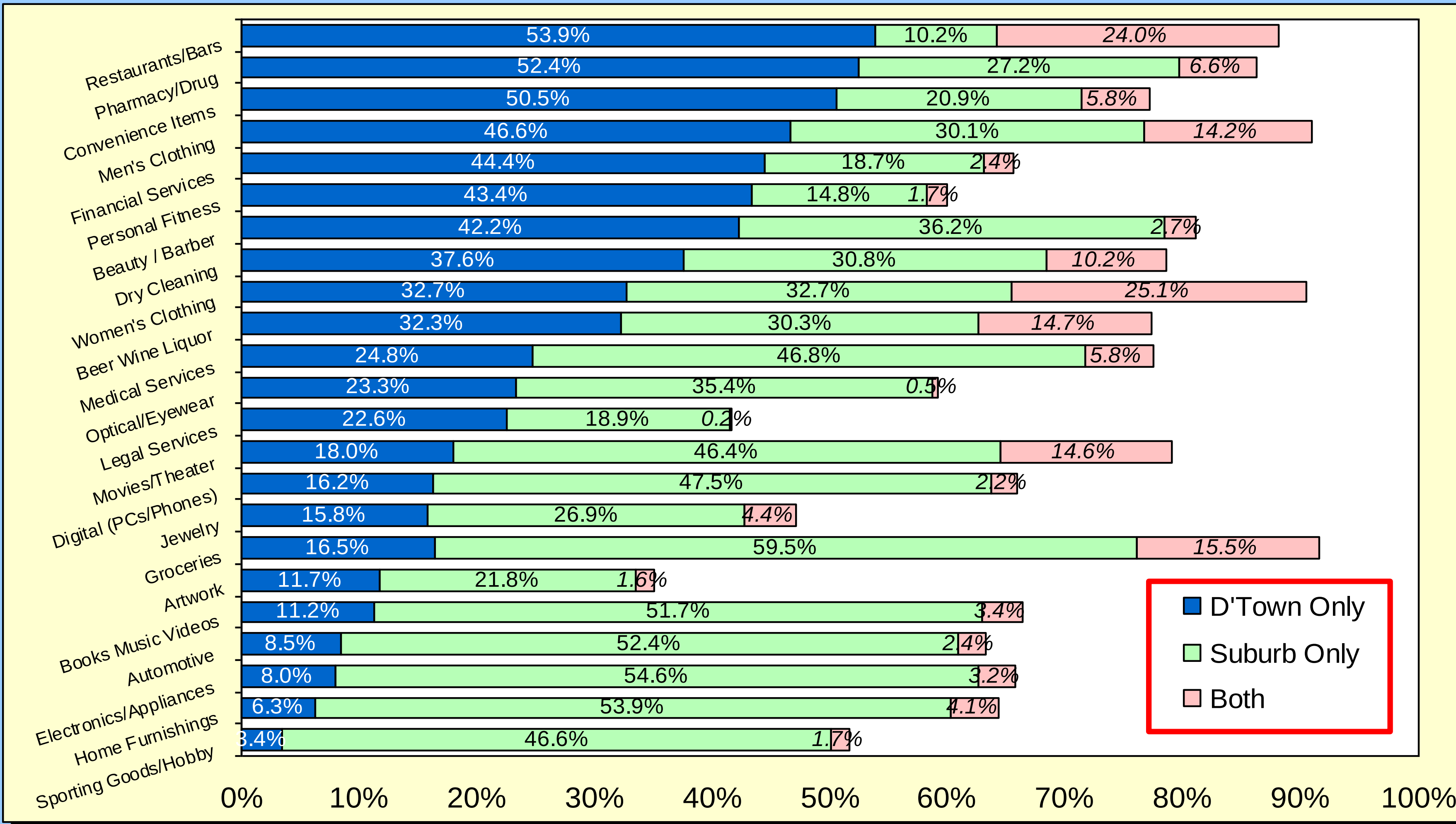
PITTSBURGH DOWNTOWN PARTNERSHIP

SHOPPING/SPENDING SUMMARY

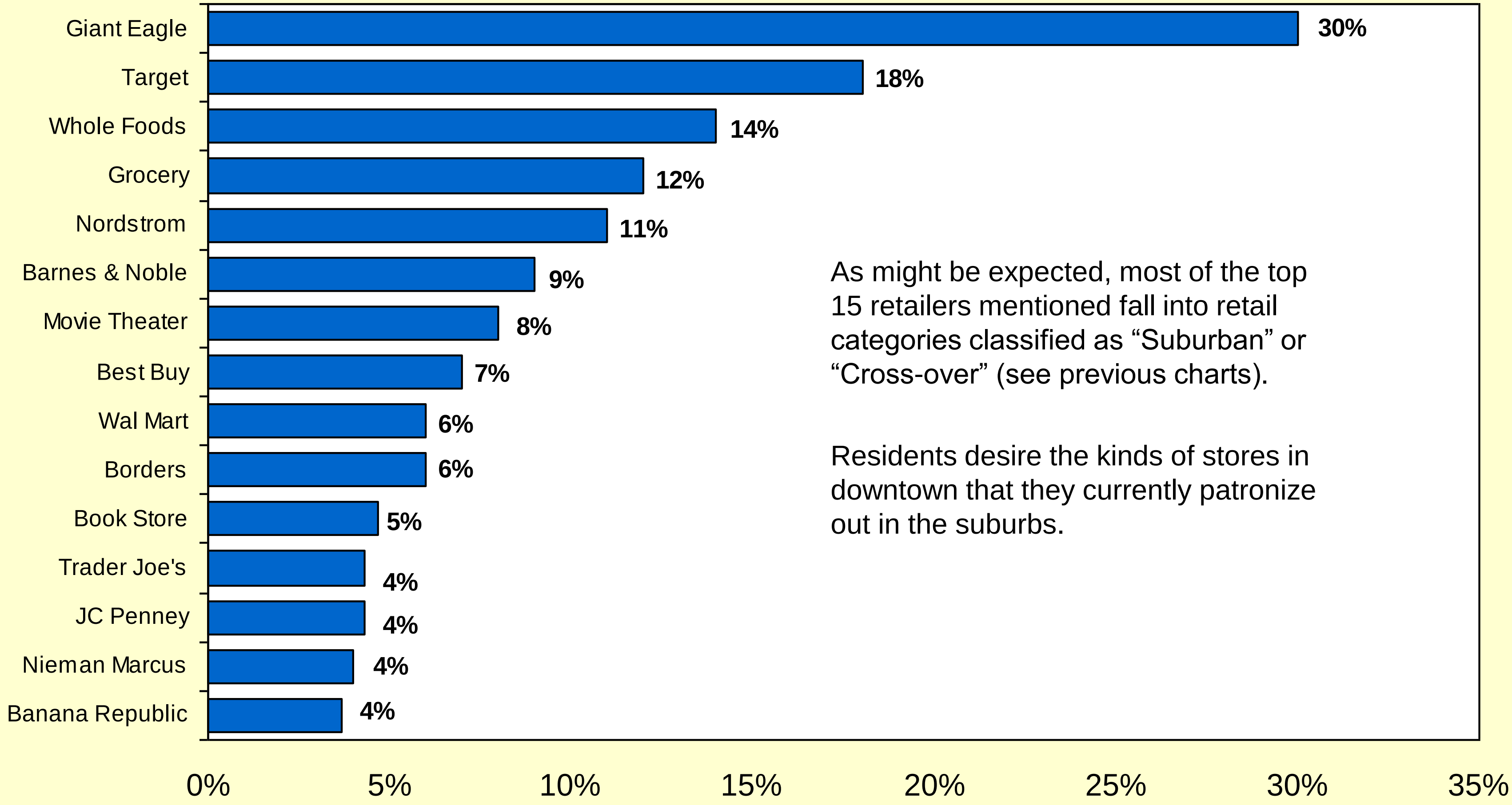
Sorted by Downtown Only Shopping %



Q11. Where do you shop for the following goods and services? (n =)

RETAILERS WANTED BY RESIDENTS

Top 15 Mentions



As might be expected, most of the top 15 retailers mentioned fall into retail categories classified as "Suburban" or "Cross-over" (see previous charts).

Residents desire the kinds of stores in downtown that they currently patronize out in the suburbs.

Q12. What 3 retailers would you most like to see come into Downtown? (n = 349)

Q12 is a multiple response question. 349 people provided 854 answers. The above chart reflects the % of people mentioning each location.

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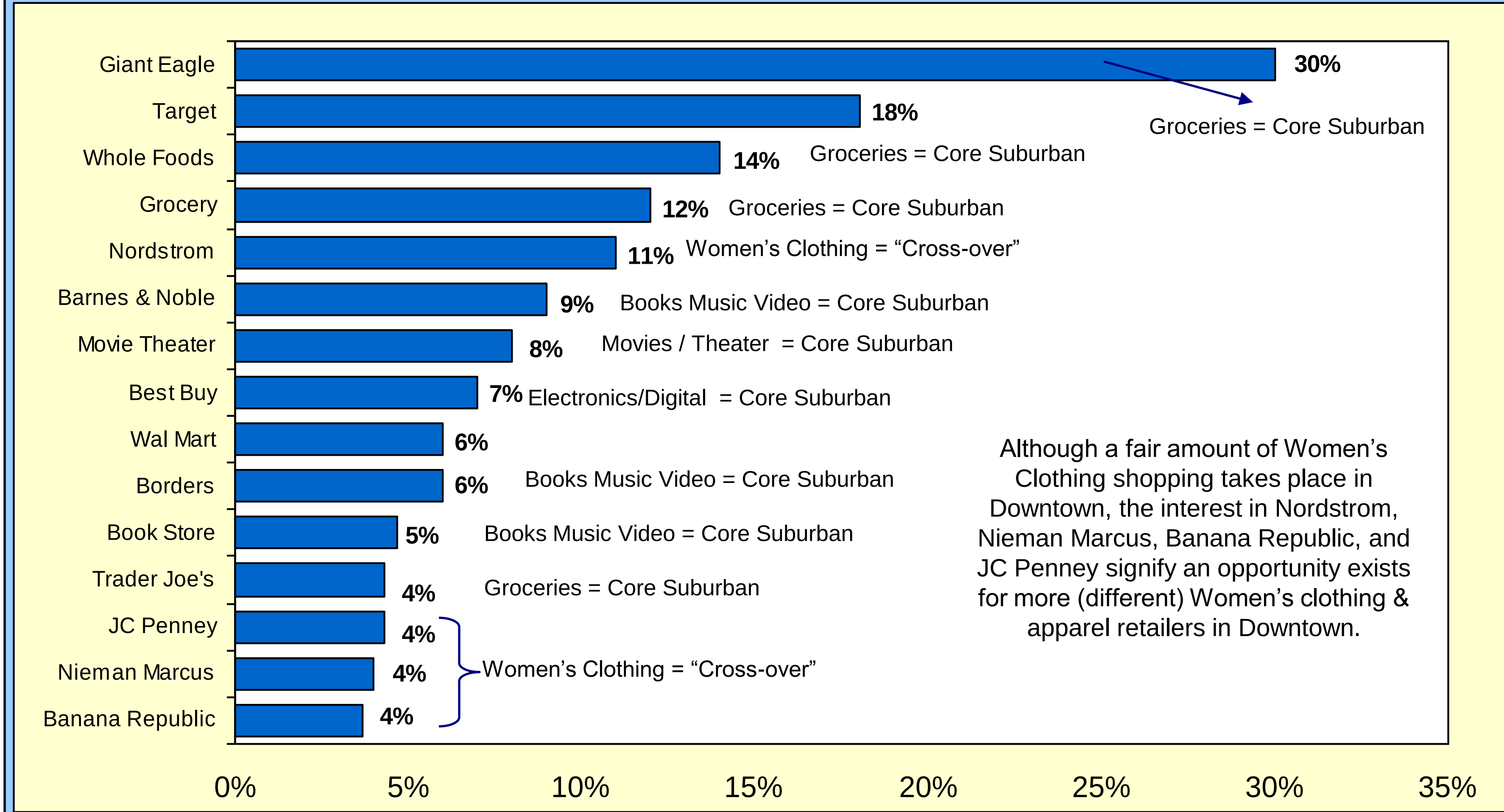
PITTSBURGH DOWNTOWN PARTNERSHIP

RETAILERS WANTED BY RESIDENTS

Top 15 Mentions



Q12. What 3 retailers would you most like to see come into Downtown? (n = 349)

Q12 is a multiple response question. 349 people provided 854 answers. The above chart reflects the % of people mentioning each location.

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PITTSBURGH DOWNTOWN PARTNERSHIP

MOST PATRONIZED DOWNTOWN BUSINESES

- **Artwork:** Art festivals, local galleries, Wood Street Framing
- **Automotive:** Goodyear, Meineke, ZipCar
- **Beauty/Barber:** Sally Beauty Supply, Luigi Caruso, Brett James Salon, Sognatore
- **Beer Wine Liquor:** State store, Wine & Spirits, Oxford Center Wine & Spirits
- **Books/Music/Video:** Barnes & Noble, Library, The Exchange
- **Men's Clothing:** Macy's, Saks, Burlington, Brooks Bros.
- **Women's Clothing:** Macy's, Saks, Burlington
- **Convenience Items:** CVS, 7-Eleven, Rite Aid, Rosebud
- **Digital Products:** Radio Shack, Verizon, T-Mobile, Cricket
- **Dry Cleaning:** Galardi's, Chuong's (Gateway T.), "apt. / building service"
- **Electronics/Appliances:** Macy's, Radio Shack, The Exchange
- **Financial Services:** PNC, Citizens Bank, National City, Dollar Bank

Q11. Write in the specific Downtown store you patronize the most (measured in dollars spent)? (n = varies by store)

MOST PATRONIZED DOWNTOWN BUSINESES

- **Groceries:** Rosebud, Strip District, CVS
- **Home Furnishings:** Macy's, Burlington, Perlora
- **Jewelry:** Macy's, Clark Building, Bailey Banks & Biddle
- **Legal Services:** Buchanan Ingersoll Rooney, Cohen & Grigsby, Reed Smith
- **Medical Services:** AGH, Mercy Hospital, UPMC Downtown
- **Movies/Theater:** Harris, South Side Works, Heinz Hall
- **Optical Products:** Gateway Eye Assoc., America's Best, Heidi Optics
- **Personal Fitness:** Apartment gym, Gold's gym, Bally's, Rivers Club
- **Pharmacy / Drug:** CVS, Rite Aid, Eckerd
- **Restaurant / Bar:** Bossa Nova, Capital Grille, Palomino, Six Penn, Seviche, Eleven
- **Sporting Goods / Hobby:** Honus Wagner, stadium/arena, Station Square

Q11. Write in the specific Downtown store you patronize the most (measured in dollars spent)? (n = varies by store)

PARKS
& GREEN SPACES

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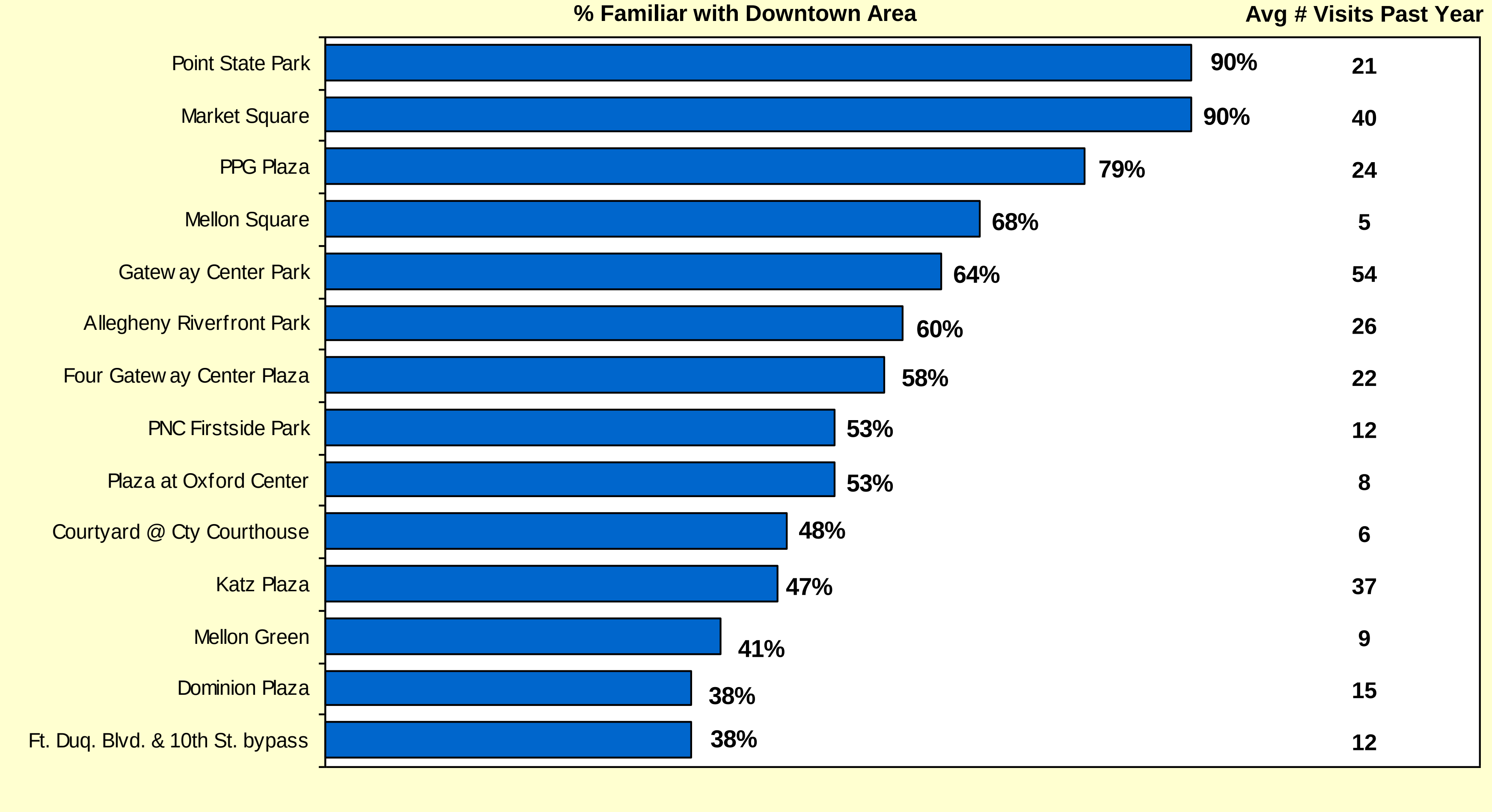
PITTSBURGH DOWNTOWN PARTNERSHIP

DOWNTOWN'S PARKS & OUTDOOR SPACES

Familiarity and Usage



Q18. Please (a) check if you are familiar with each green space/outdoor area listed (know where it is) and (b) how many times you have visited/used each area in the past year. (n = 411)

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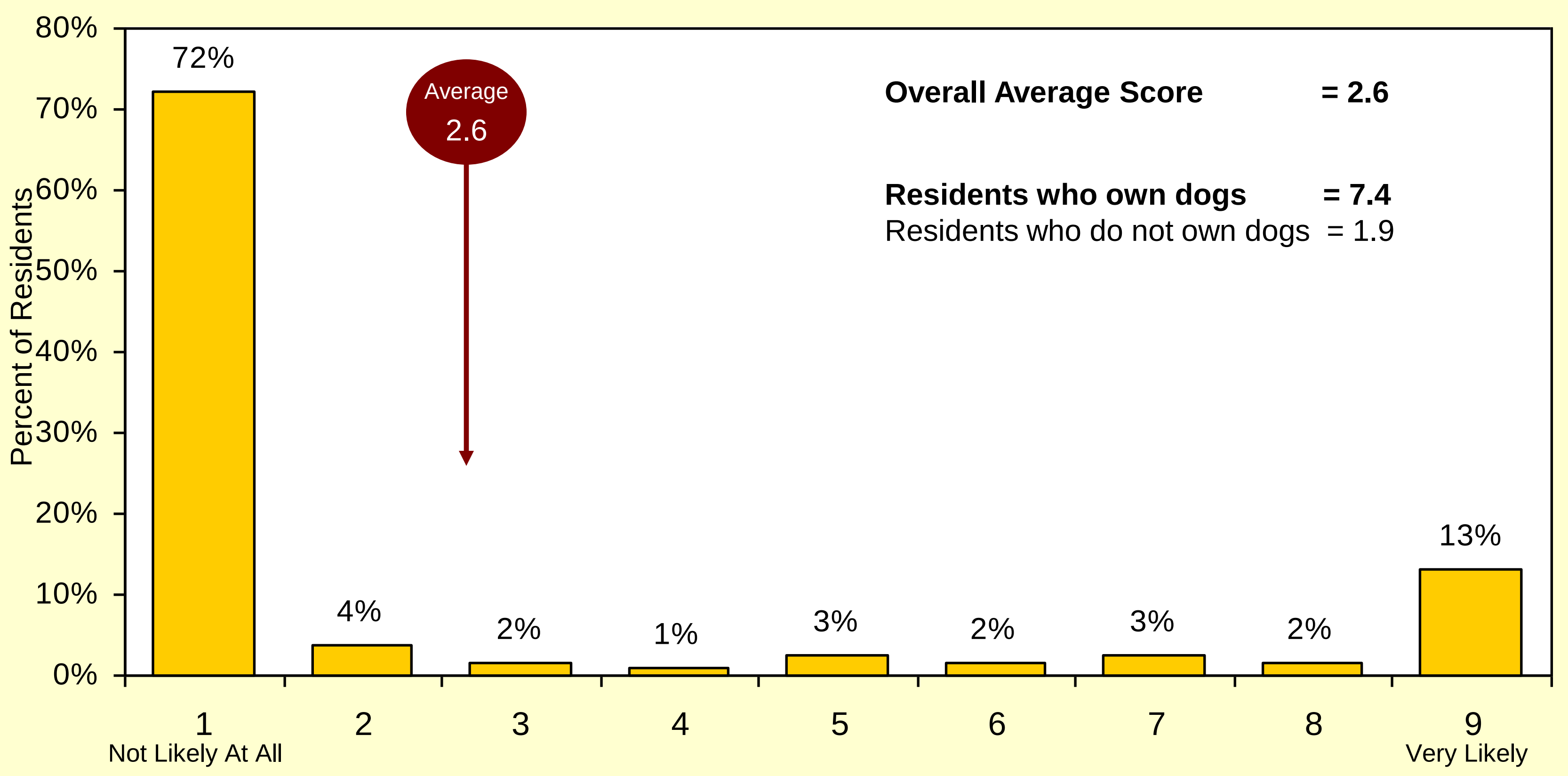
PITTSBURGH DOWNTOWN PARTNERSHIP

LIKELIHOOD TO USE DOG PARK

1 = Not Likely at All; 9 = Very Likely



Q19. If a small off-leash dog park was established near Gateway Center, how likely would you be to use it? (n = 390)

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PITTSBURGH DOWNTOWN PARTNERSHIP

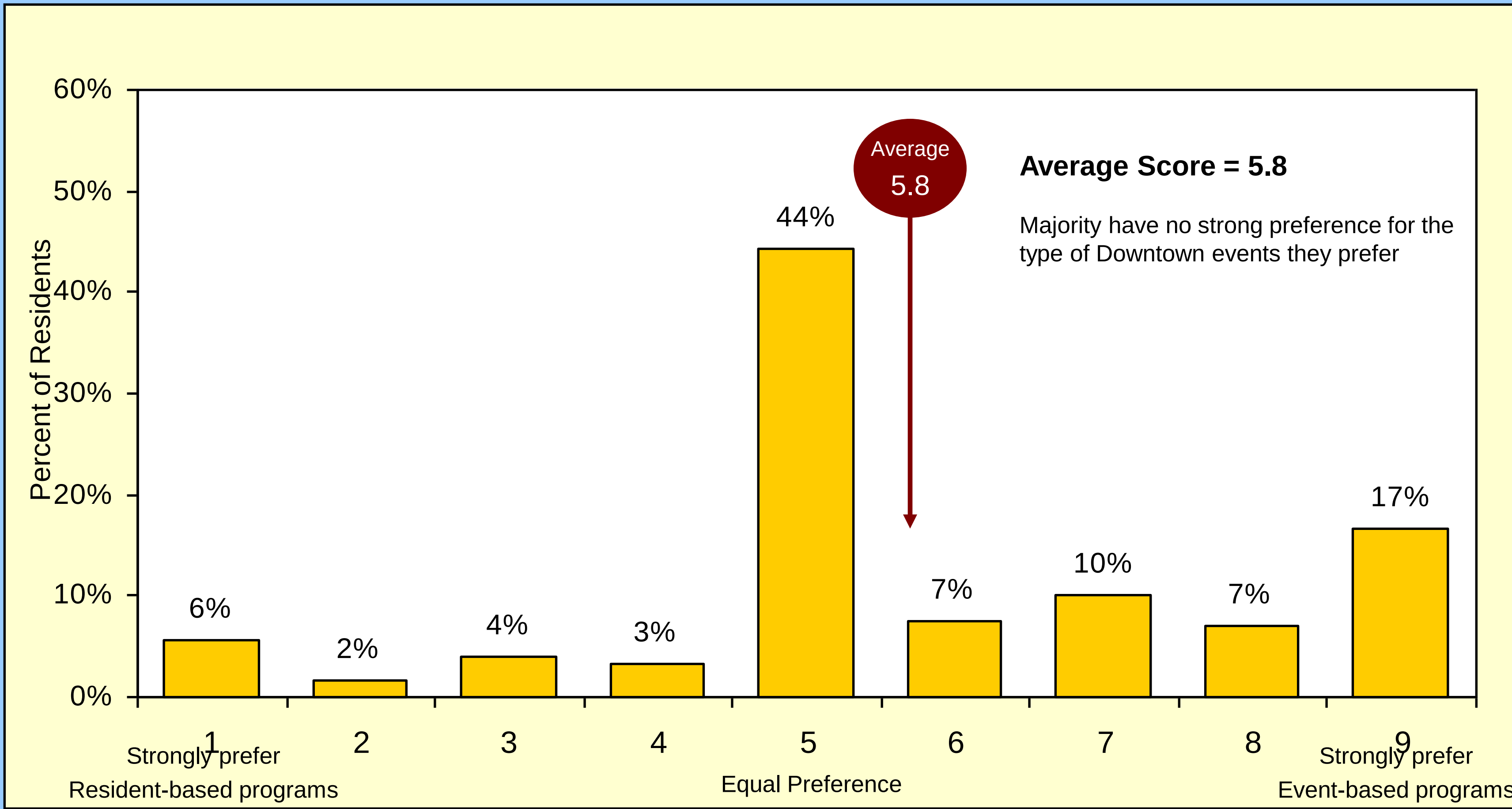
EVENTS

&

PROGRAMMING

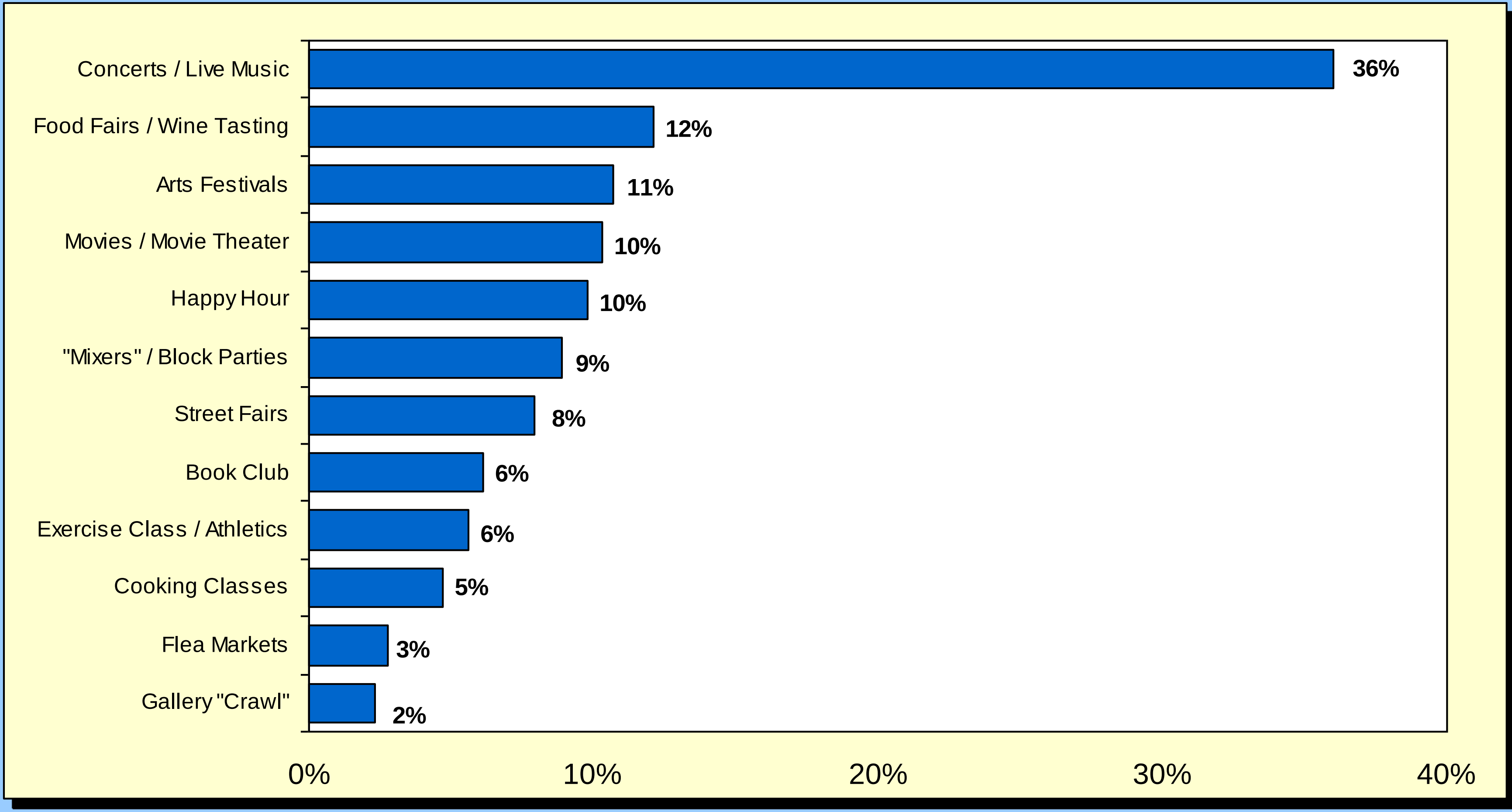
TYPES OF EVENTS DESIRED BY RESIDENTS

1 = "Resident-based"; 9 = "Event-based"



Q20. Which event type is more desirable to you? (n = 378)

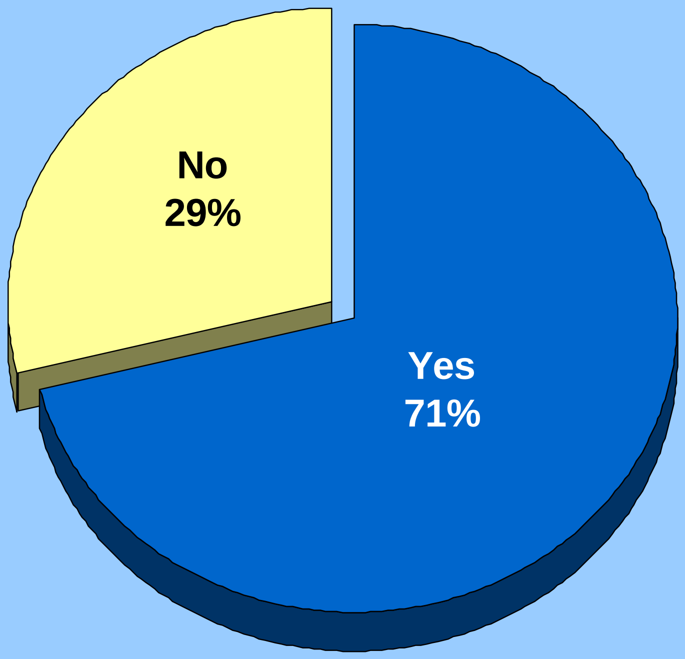
EVENTS & PROGRAMS DESIRED BY DOWNTOWN RESIDENTS



Q21. What specific types of events programs would you like to see made available (or see more often) for you in your Downtown neighborhood? (n = 214)

Q21 is a multiple response question. 214 people provided 343 answers. Shown above the % of people mentioning each type of event.

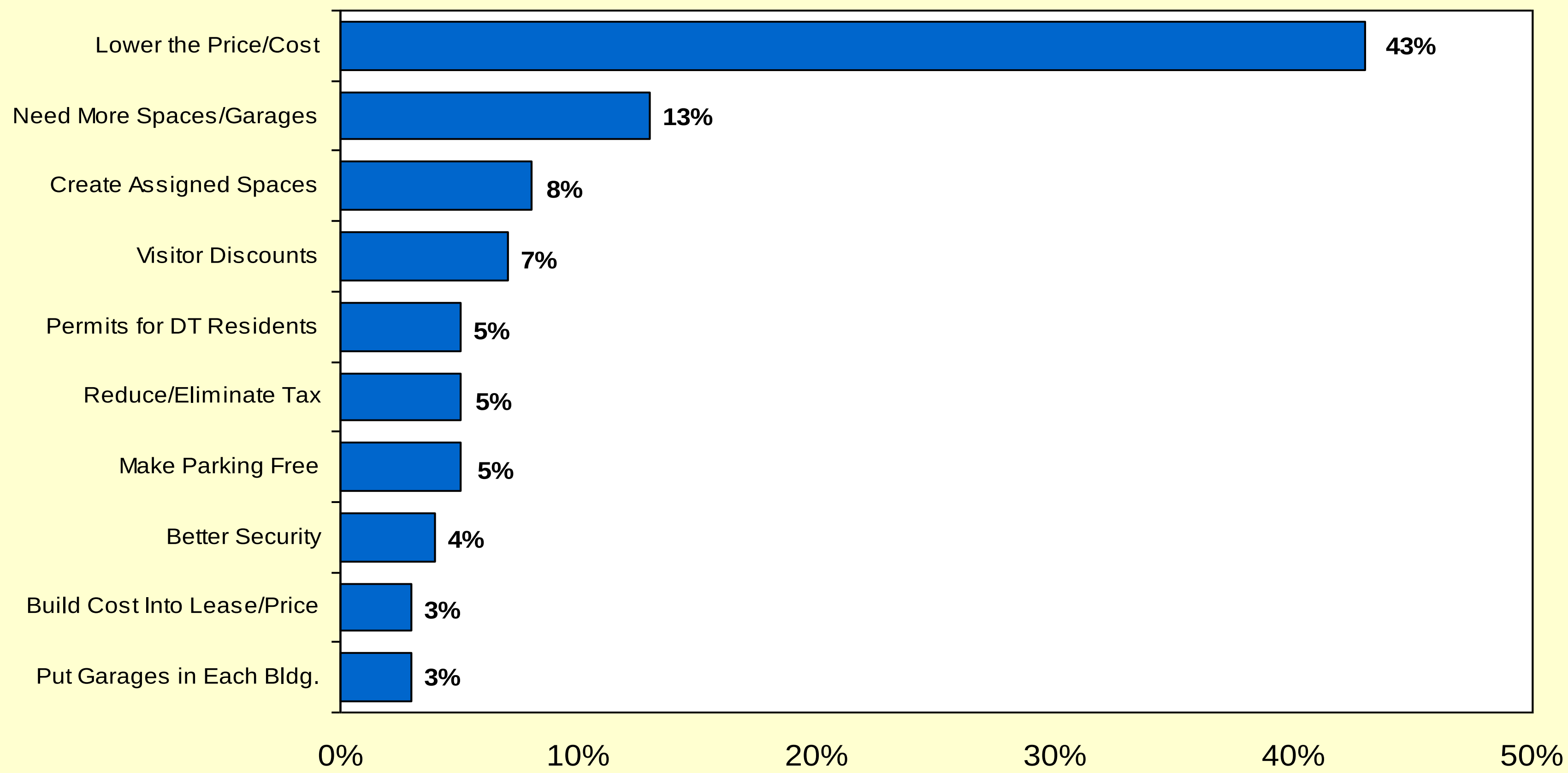
DESIRE FOR MORE NEIGHBORHOOD INVOLVEMENT & NEIGHBOR NETWORKING



Q22. Would you like to have more opportunities to become more ? (n = 368)

TRANSIT ATTITUDES & USAGE

SUGGESTIONS TO IMPROVE PARKING



Q24. If you consider the parking situation for Downtown residents a problem, please share any ideas you have to improve it. (n = 170)

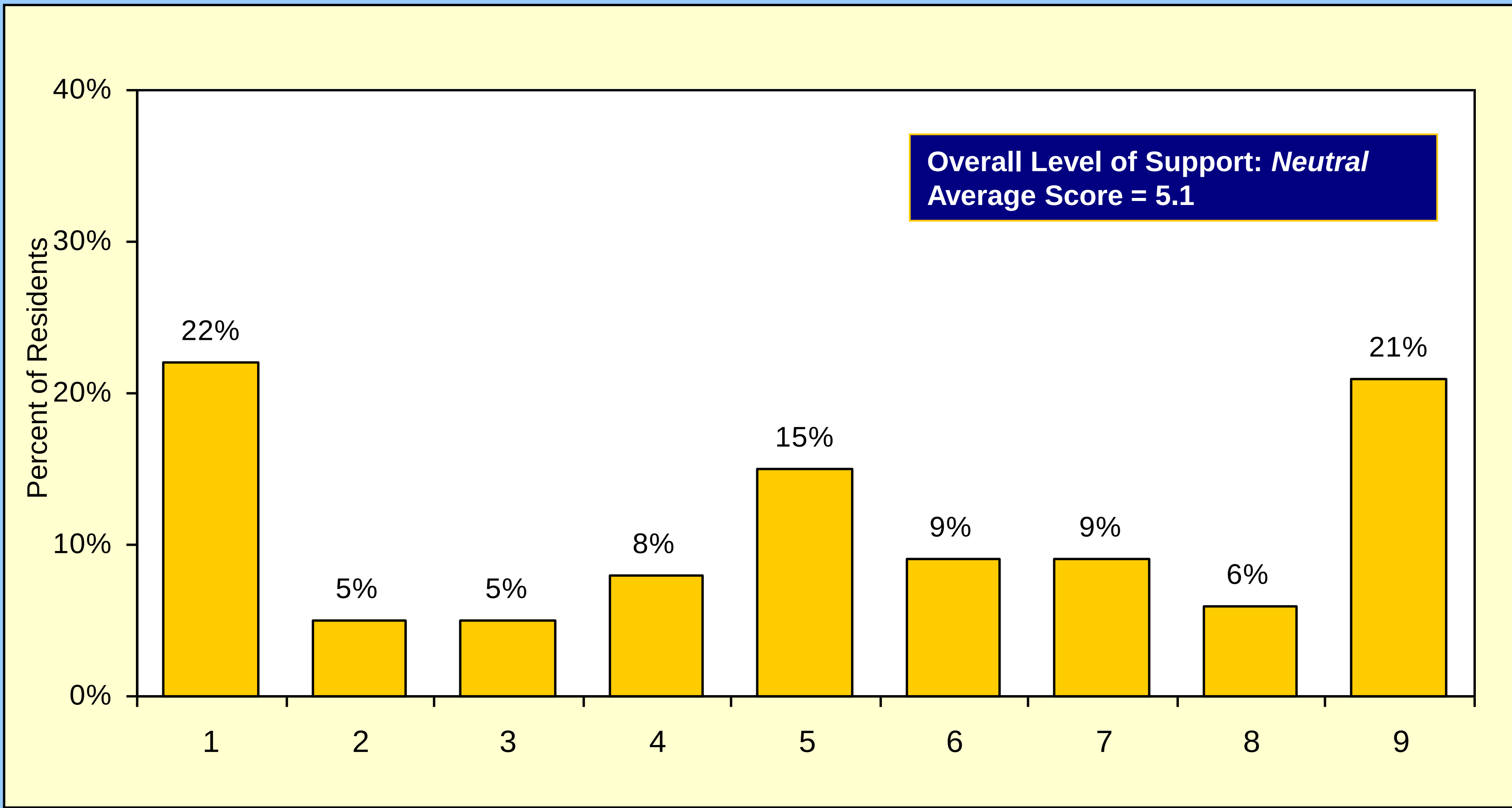
Q24 is a multiple response question. 170 people provided 196 answers. The above table reflects the % of people mentioning each idea to improve parking.

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

ADD BUS SERVICE BETWEEN RUSH HOURS

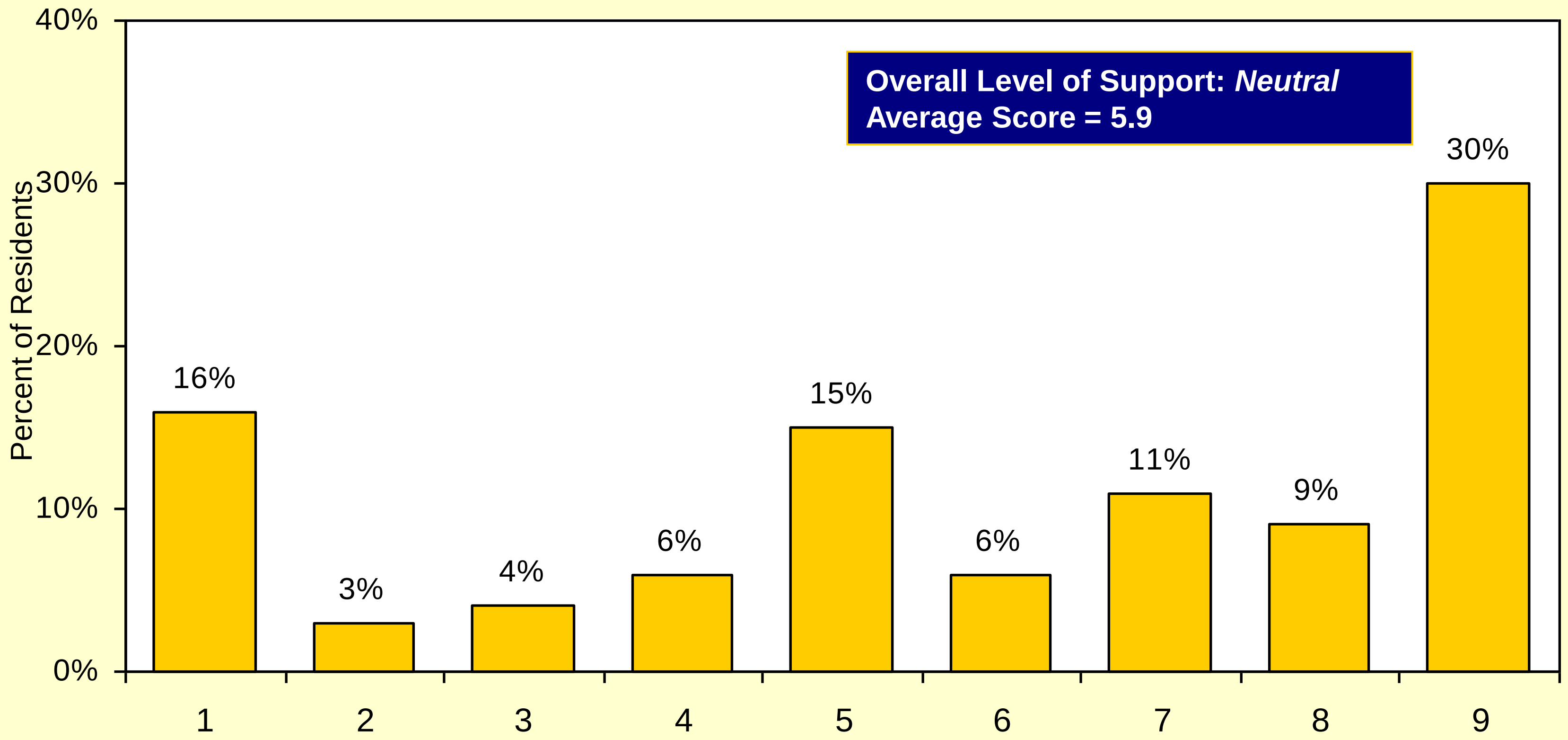
1 = No support at all; 9 = Very supportive



Q25a. Level of support for enhancing Downtown bus service by adding service between the 2 rush hour periods and after the evening rush hour peak. (n = 363)

CHANGE BUS ROUTES TO INCREASE USAGE OF "T" SYSTEM

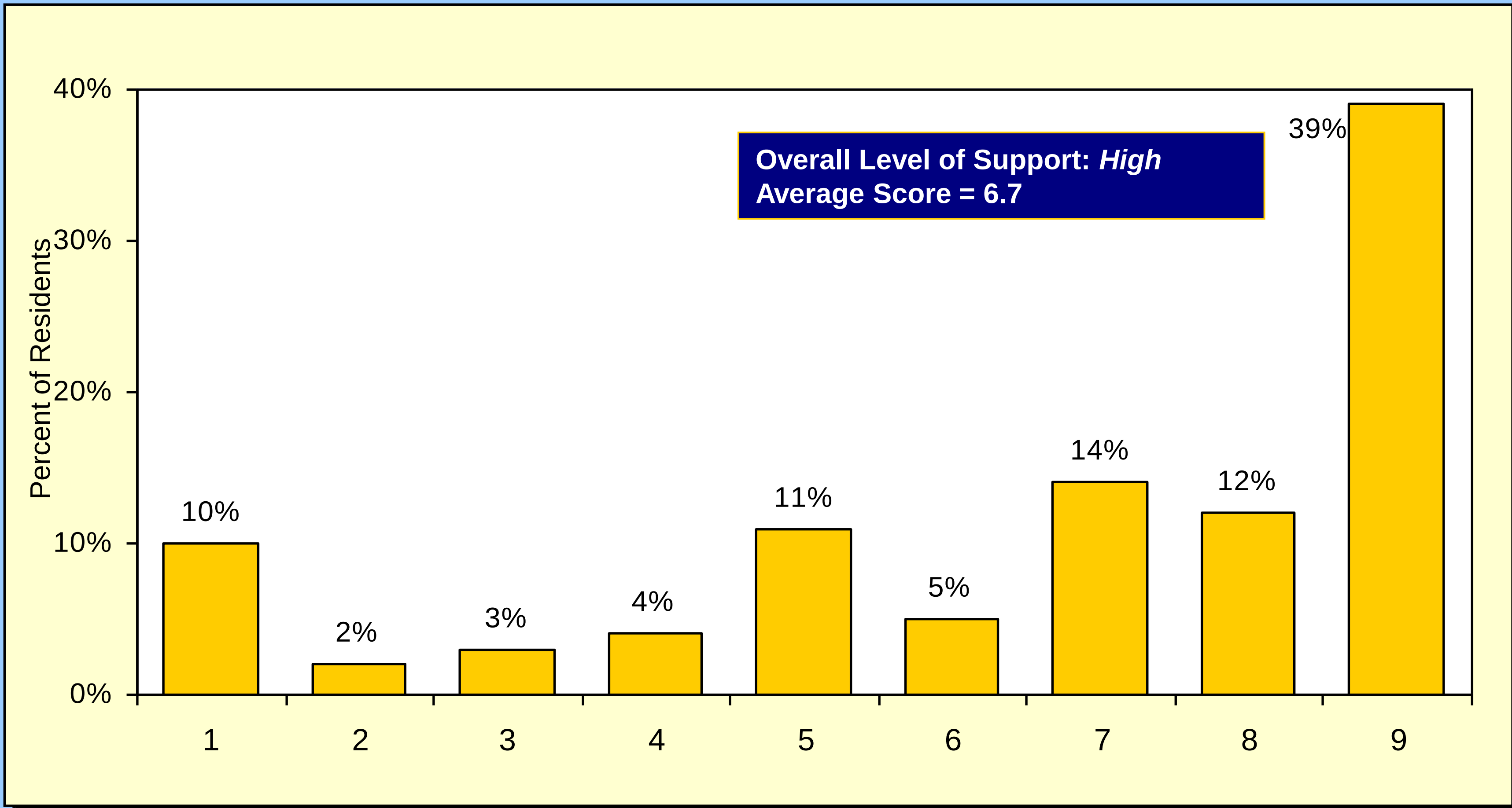
1 = No support at all; 9 = Very supportive



Q25b. Level of support for making bus routing changes that increase the usage of Downtown's T system. (n = 356)

CREATE NEW LABELING SYSTEM FOR BUSES AND BUS ROUTES

1 = No support at all; 9 = Very supportive



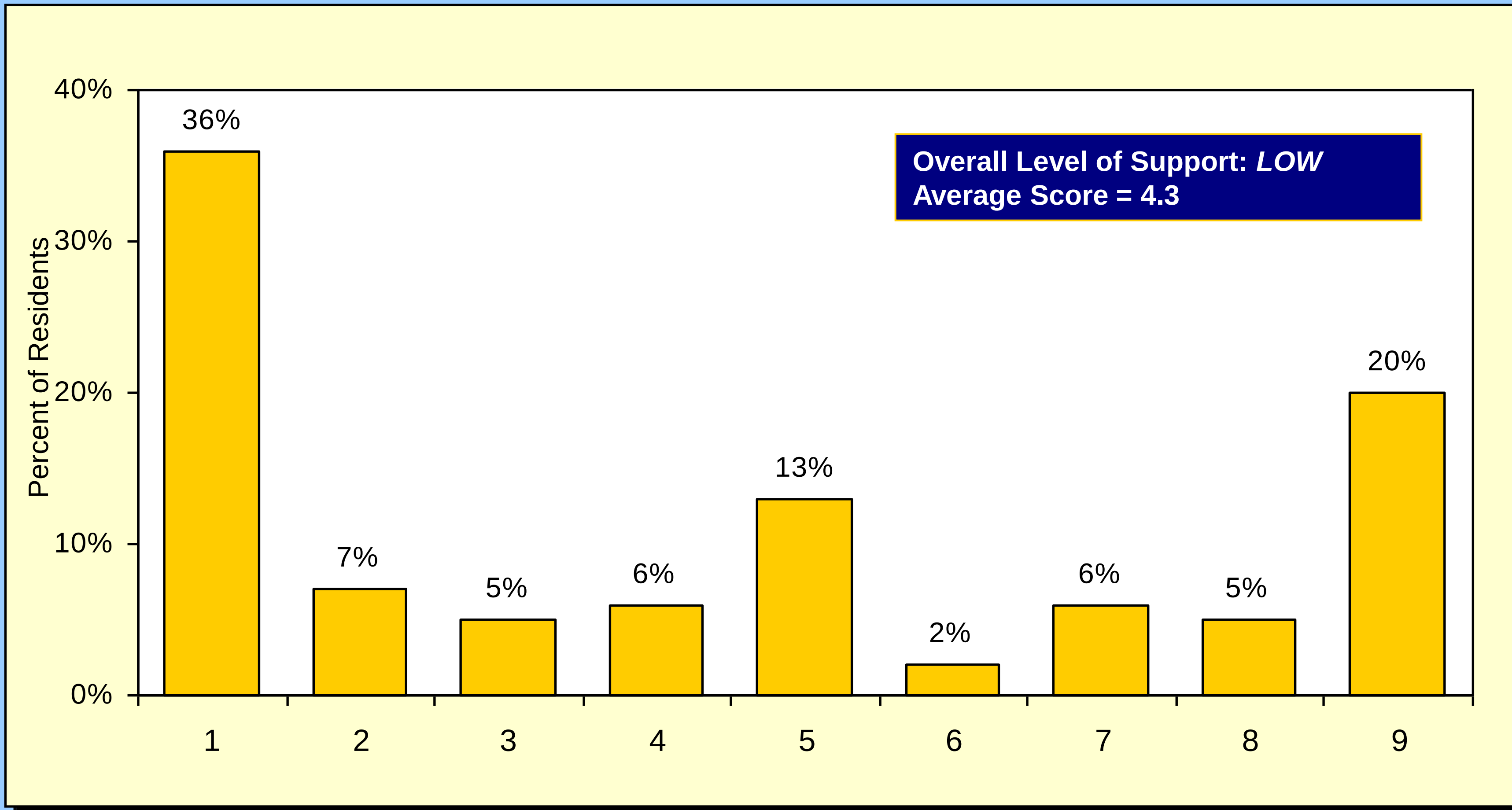
Q25c. Level of support for developing and implementing a new bus "labeling" system that makes the bus system easier to comprehend than the current one. (n = 365)

Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

DECREASE THE NUMBER OF BUS STOPS IN DOWNTOWN

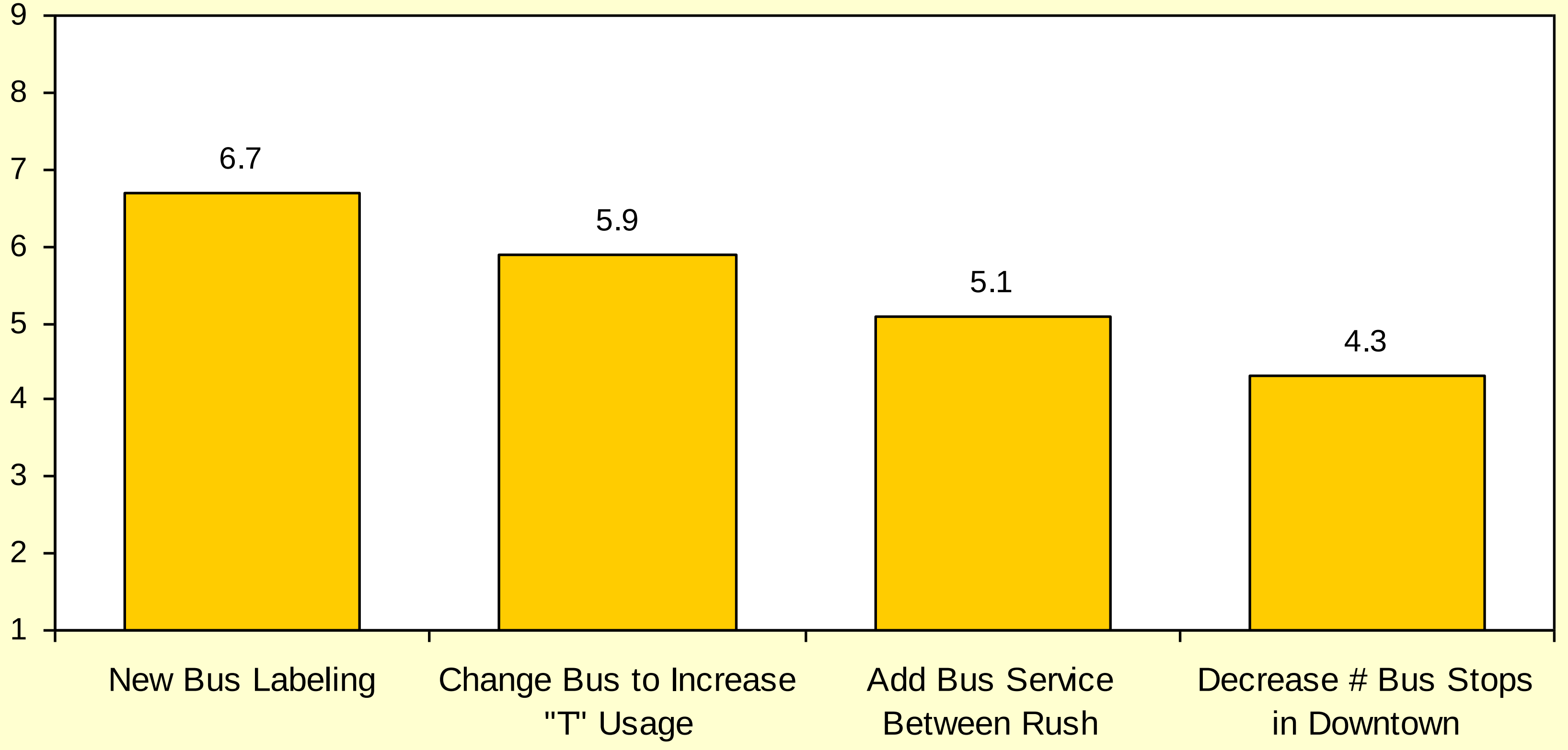
1 = No support at all; 9 = Very supportive



Q25d. Level of support for fewer bus stops in Downtown. (n = 358)

SUMMARY OF SUPPORT FOR BUS SYSTEM CHANGES

1 = No support at all; 9 = Very supportive



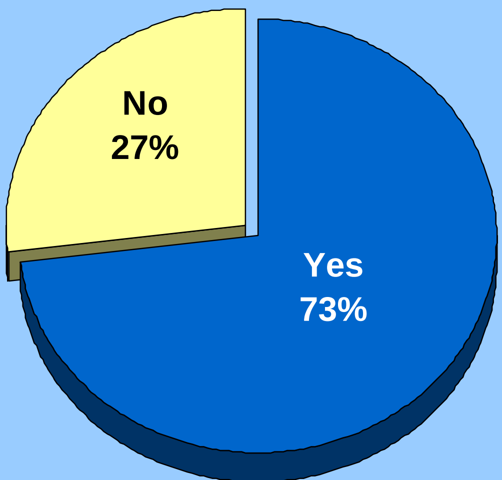
Strategic Metrics Group

PITTSBURGH DOWNTOWN PARTNERSHIP

CAR SHARING

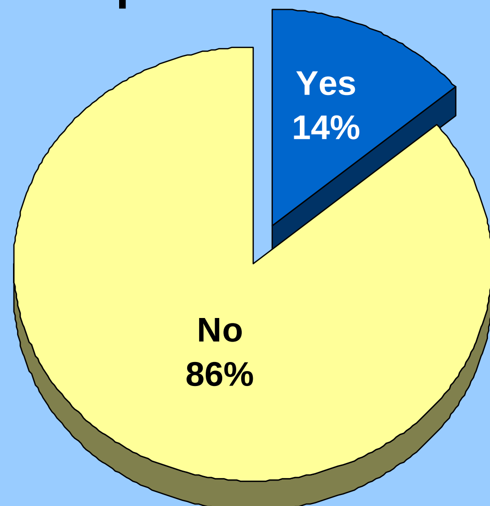
CAR SHARING SUMMARY

Aware of ZipCar?



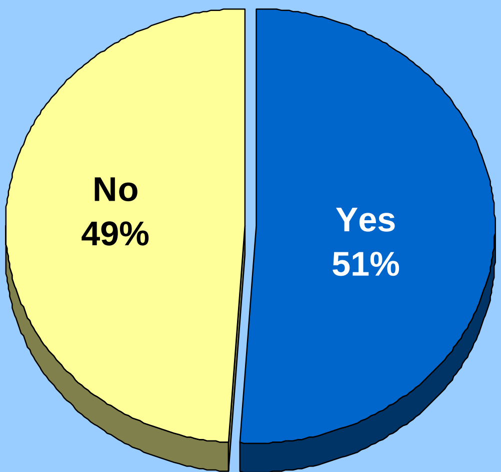
286 of 390 residents were aware of ZipCar
In their neighborhood

If Aware, are you ZipCar Member?



38 of 280 (those who were aware) are
ZipCar members

If Member, has ZipCar Prompted You to Sell Car?



19 of the 37 members said “Yes”

Members used ZipCar 6.5 times (on average) in the past 6 months

Q26. Please indicate your awareness and usage of Downtown’s car-sharing program. (n = 390)

MOTIVATION TO TRY CAR SHARING OR USE IT MORE OFTEN

Nothing	26.8%
Cheaper rates	13.4%
I have my own car (nothing)	7.0%
Nothing - I don't drive	6.3%
Eliminate the county tax	5.6%
More availability	5.6%
Free trial	4.2%
If I had a need	4.2%
If I didn't have a car	3.5%
More information	2.8%
If it were cheaper than owning a car	2.8%
If I worked downtown	2.1%
Raise the age limit	2.1%
Need to know the system & cars are reliable	2.1%

If my car breaks down	1.4%
when I retire	1.4%
Will use when my car lease expires	1.4%
Will use when my son is able to drive	1.4%
If gas prices go up	0.7%
If Zip Cars had tow hitches	0.7%
Longer usage times	0.7%
When my car dies	0.7%
If I could leave it at the airport	0.7%
If I didn't have indoor parking	0.7%
More help with customer service	0.7%
Increase in parking cost & decrease usage of my car	0.7%

Q26e. What would motivate you to try or use the ZipCar service more often? (n = 142)

SUMMARY COMMENTS

SUMMARY OF FINDINGS

- 66% of Downtown residents lived in Allegheny County or bordering counties prior to moving Downtown. 24% previously lived outside of Pennsylvania.
- 22% own their Downtown residence – 78% currently rent.
- A wide age range in sample - the single largest group is 25-29 yrs. old.
- All income levels represented in sample - however income skews higher than comparable national, Allegheny County, or City of Pittsburgh measures.
- The majority (58%) of Downtown households are 1 person – with an average overall household size of 1.4 people.
- The number of married households is equal to the number of single, separated, and divorced households.
- Children (<18 yrs.) are present in just 3% of Downtown households.
- 54% have lived in their Downtown home for 2 years or less. The average length of time is 4.6 years.

SUMMARY OF FINDINGS

- Proximity to work/school is the top reason cited for moving Downtown. Other frequently cited reasons include “convenience/accessibility”, “city lifestyle”, and “appeal of building/property”.
- Shadyside and South Side are the neighborhoods most likely to be also considered during the housing search process. 1 in 3 respondents looked exclusively at Downtown properties.
- Satisfaction with the decision to move Downtown is high: 7.9 on 9 point scale where 9 = Very Satisfied.
- Satisfaction with the Downtown residence (the building) is also high, with an average score of 7.7 on a 9 point scale.
- Downtown is shopped/patronized most heavily for:
  - 1. Restaurants/Bars, 2. Pharmacy/Drug 3. Convenience items
  - 4. Men’s Clothing 5. Financial Services 6. Personal Fitness
- 3 of top 4 stores residents want in Downtown are grocery-related. There is also a need for more/different women’s clothing stores.

SUMMARY OF FINDINGS

- Saturday is the alternative or “other" day most residents would like to see the Farmer’s Market open. Produce, Meat/Seafood, and Dairy products are the goods most wish they could find at the market.
- Familiarity with Downtown parks ranges from a high of 90% (Point Park) to a low of 38% (Mellon Green). Number of visits to 14 parks varies greatly by park.
- 7 of 10 residents do want more opportunities to get involved with their Downtown neighbors and community.
- The most desired type of event (to be held in Downtown) is live music/concerts.
- A new bus “labeling” system is supported by Downtown residents, while fewer bus stops in Downtown is not.
- 73% aware of ZipCar - 14% are members – Average 1 use per month.
- Residents’ top 3 suggestions to improve parking situation:
  - Lower the cost Create more spaces/garages Create assigned spaces