Downtown Pittsburgh

> Living, Working & Commuting

2010 Studies Profiling Downtown Pittsburgh Residents, Workers and Commuters

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PITTSBURGH DOWNTOWN PARTNERSHIP

Downtown Pittsburgh is an ever-evolving area of the City in which its continued growth is dependent on its residents, workers and commuters.

To track Downtown's progress in 2010, the Pittsburgh Downtown Partnership commissioned four studies to be conducted to gain insight about the area and profile those who utilize it. The following report combines the findings of the Resident, Downtown Workforce, Pedestrian Traffic and Employee Transportation studies to highlight key findings about those who travel to Downtown, work in the area or call it home.

Living

- Deciding to Make the Move Downtown
- Who is Calling Downtown Pittsburgh Home?
- Downtown Living Trends
- Getting Around
- Downtown Resident Satisfaction

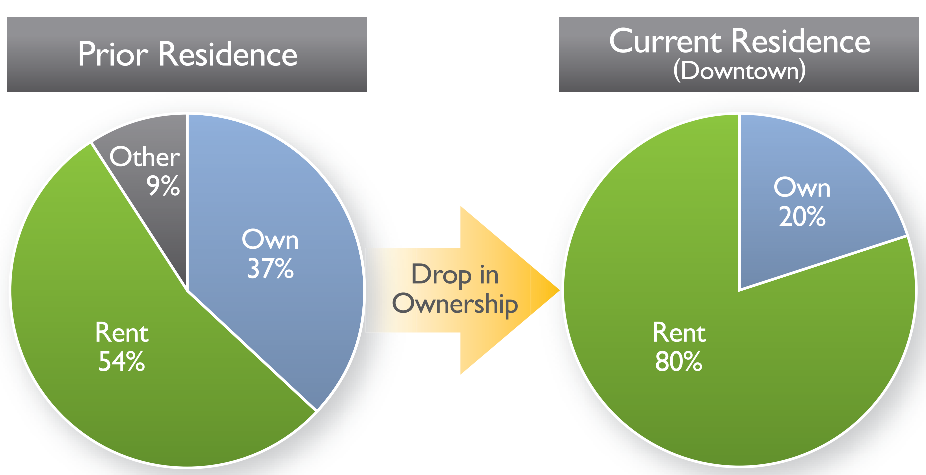
80% of Downtown Residents Rent

Deciding to Make the Move Downtown

Ownership Status

Source: Resident Study

Rent vs. Own – Downtown Residence



Top reasons for moving Downtown include:

- Convenience / Central location / Accessibility to everything
- Desire for city living / Chance to get out of the suburbs
- Appeal of Downtown buildings / Properties

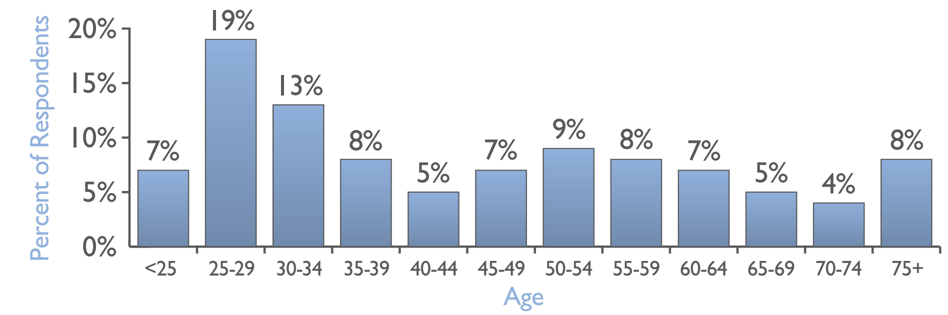
The average time for residents to make the move is 15 months from initial idea to move in.

Who is Calling Downtown Pittsburgh Home?

Age of Residents

Source: Resident Study

Percent of Residents by Age Group

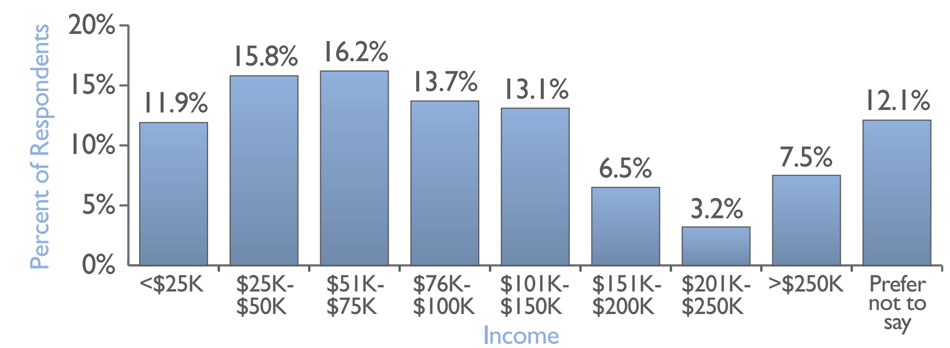


Age 25-29 remains the peak age group of Downtown Pittsburgh residents. Starting at age 30, this drops steadily until the late 40s, when urban living begins to rise again.

Total Annual Household Income

Source: Resident Study

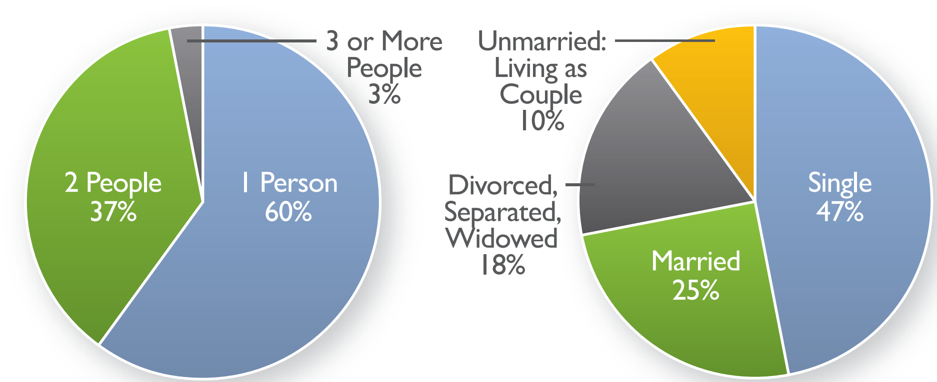
Percent of Residents by Income Category



While annual household income is evenly distributed among those living in Downtown, one-third of residents have incomes over $100,000.

Household Size & Marital Status

Source: Resident Study



Household size and marital status among Downtowners in 2010 remained similar when compared to previous studies. While average household size increased to 1.5 people, just 4% of households have children.

Downtown Living Trends

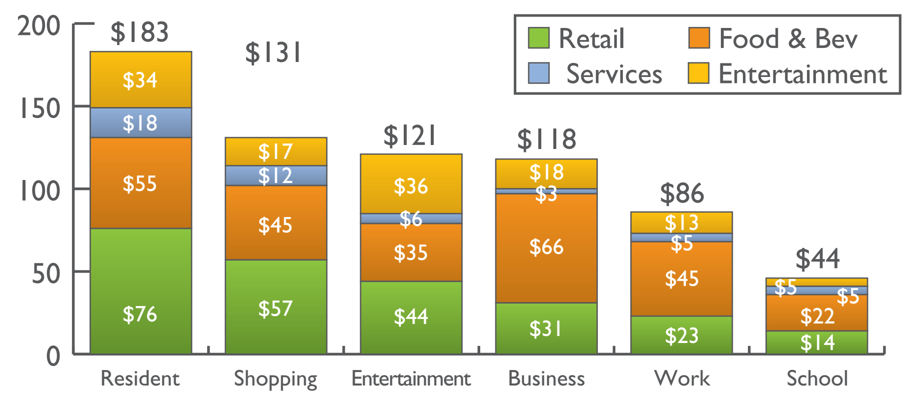
Downtown residents spend significantly more than other groups when compared to commuters and workers. While average Downtown spending is $98 per week, residents are spending $183 per week at Downtown retailers.

When compared to previous studies, total weekly spending by Downtown residents increased by $15.

Spending by Type of Pedestrian

Source: Pedestrian Study

Average Total Weekly Amount Spent



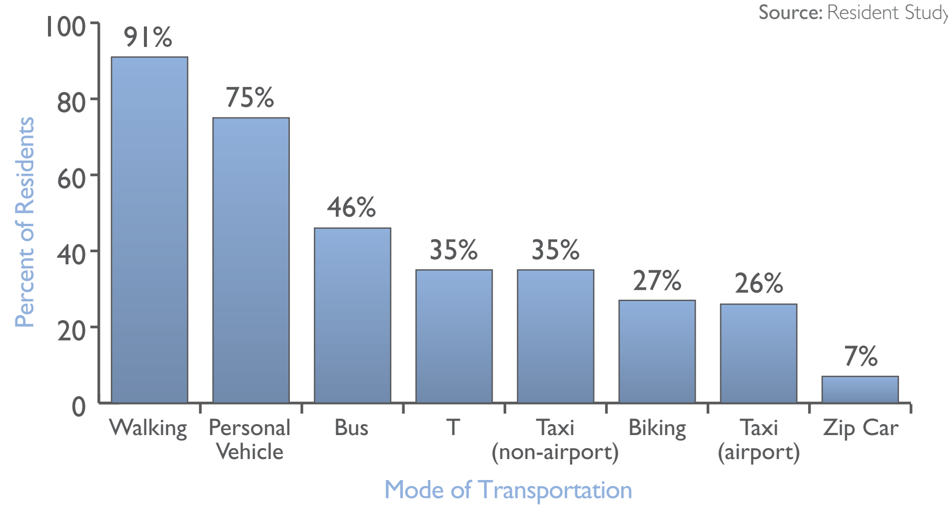
Getting Around

Public transportation usage and walking increase sharply once residents move Downtown.

Weekend pedestrian traffic Downtown builds steadily throughout the morning and remains stable until its peak from 4:30 p.m. to 5:30 p.m.

Modes of Transportation Used by Residents

Source: Resident Study



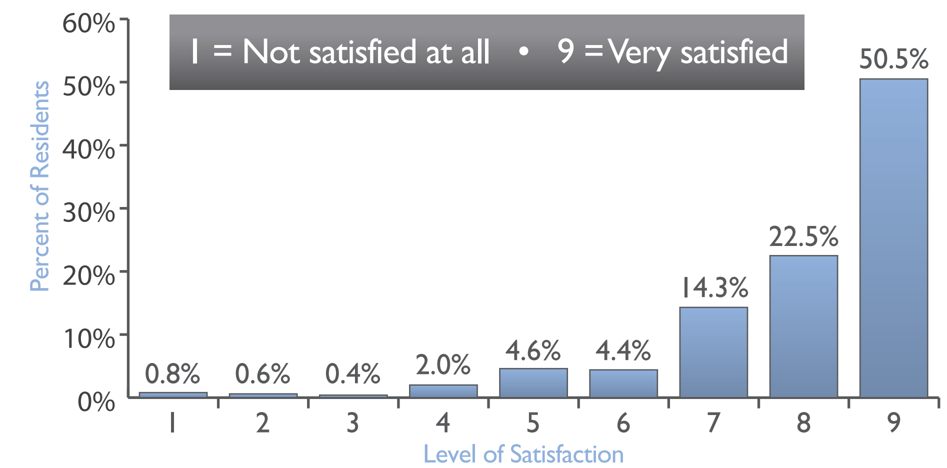
Downtown Resident Satisfaction

Residents attribute many reasons for the positive quality of life of Downtown living.

- Access to restaurants
- Public transportation
- Biking / Walking trails
- Events / Entertainment in the area
- Cultural District activities
- Beautiful views

Satisfaction with Decision to Live in Downtown

Source: Resident Study

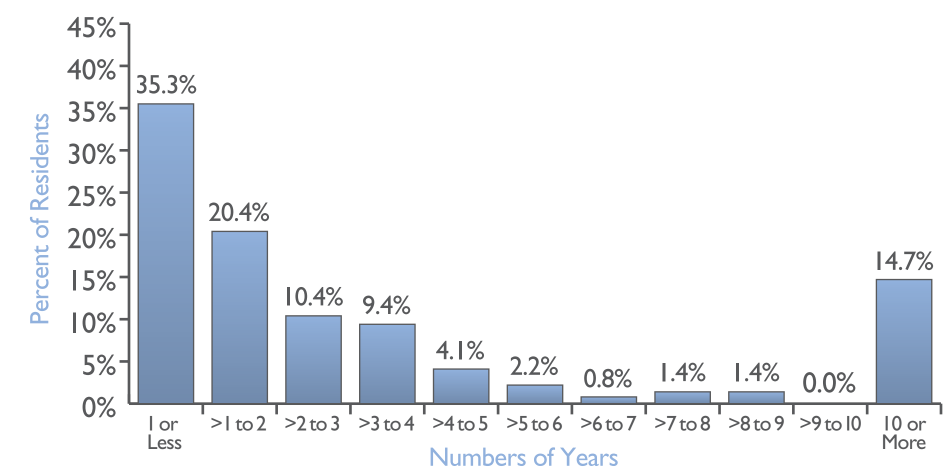


The majority of Downtown residents are satisfied with their decision to live Downtown.

Tenure at Downtown Residence

Source: Resident Study

Number of Years Living at Current Residence



Even with high satisfaction levels, the average number of years residents live Downtown is 4.4 years, with one-third staying one year or less.

Working

- The Expanding Greater Downtown Workforce
- Areas of Downtown Host Different Industries

126,370 Employees

The Expanding Greater Downtown Workforce

Eight in ten workers are employed Downtown in one of four industries: Service, Finance, Retail or Public Administration.

Two-thirds of the Downtown workers are employed in Service or Finance

Detail of Downtown's Top Four Industry Classes

2010 Number of Employees in Downtown

Source: Work Force Study

Retail	
Eating & Drinking Places	5,682
Home Furniture, Funishings & Equipment	2,246
Food Stores	1,355
Miscellaneous Retail	1,196
Apparel & Accessory Stores	429
General Merchandise Stores	343
Building Materials, Garden Sup & Mob Home	93
Automobile Dealers & Gas Service Stations	37
Total	**11,381**

Services	
Legal Services	15,012
Eng., Acct., Research & Mgmt. Related Srvcs.	9,226
Health Services	5,523
Business Services	5,184
Social Services	3,657
Educational Services	2,922
Hotels & Other Lodging Places	2,854
Membership Organizations	1,713
Amusement & Recreational Services	1,631
Automobile Repair, Services & Parking	661
Personal Services	615
Motion Pictures	432
Museums, Art Galleries, Zoos, Etc.	281
Miscellaneous Services	202
Miscellaneous Repair Services	151
Total	**50,065**

Public Administration	
Exec., Leg. & Gen. Govt. (Except Finance)	5,233
Justice, Public Order & Safety	2,680
Administration of Human Resource Programs	1,122
Public Finance, Taxation & Monetary Policy	624
Administration of Economic Programs	317
Admin. of Environ. Quality & Housing Programs	242
National Security & International Affairs	108
Total	**10,326**

Finance	
Insurance Carriers	13,200
Security & Commodity Brokers & Service	9,349
Depository Institutions	3,924
Insurance Agents, Brokers & Service	2,455
Real Estate	2,443
Holding & Other Investment Offices	1,258
Non-Depository Credit Institutions	320
Total	**32,950**

Areas of Downtown Host Different Industries

2010 Downtown Employee Count

Number of Employees by Industry Class & Census Tract

Source: Work Force Study

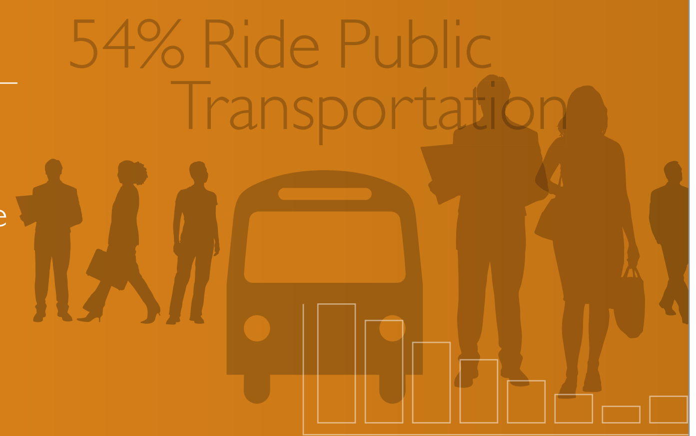
	Uptown	Golden Triangle	Strip District	South Shore	North Shore	Total
Agriculture	0	26	142	0	0	**168**
Mining	0	64	0	0	0	**64**
Construction	25	698	306	4	408	**1,441**
Manufacturing	62	5,714	1,001	30	1,501	**8,308**
Transportation	94	2,484	2,764	44	217	**5,603**
Wholesale	86	459	687	636	93	**1,961**
Retail	260	6,743	2,138	1,703	537	**11,381**
Finance	59	31,158	1,142	413	178	**32,950**
Services	5,046	38,920	2,038	1,210	2,852	**50,066**
Public Admin.	736	9,242	307	37	4	**10,326**
Miscellaneous	6	1,995	2,060	22	19	**4,102**
Total	**6,374**	**97,503**	**12,585**	**4,099**	**5,809**	**126,370**

Top PRIZM Social Group Profiles that describe Downtown employees:

- Middleburbs
- The Affluentials
- Midtown Mix
- Urban Cores

Commuting

- Getting Where They Need to Be
- Who is a Commuter?
- Pedestrian Traffic Part of the Downtown Commute
- Public Transportation Rider Profile
- Transit Demographics
- Commuters by Industry
- Increasing Commuting Costs

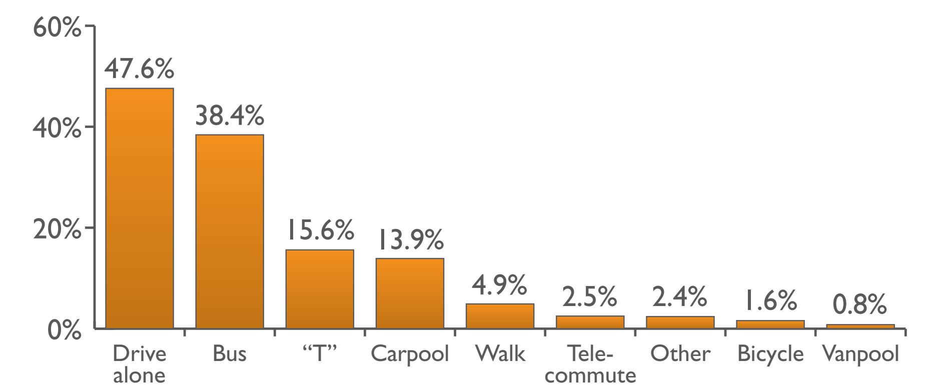


Getting Where They Need to Be

How People Commute to Downtown

All Respondents

Source: Transportation Study

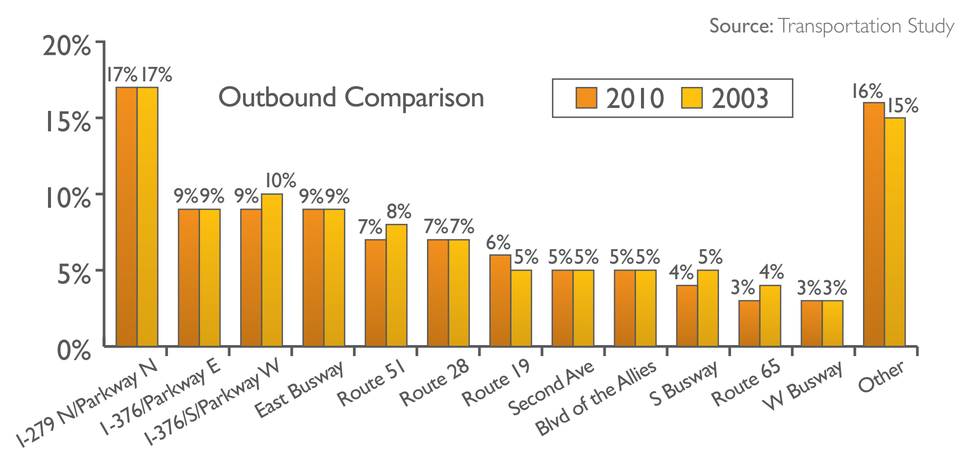


The average commute is 13 miles to Downtown and takes 36-39 minutes.

The two-hour time frames of 7-9 a.m. and 4-6 p.m. are the clear "rush hours" into, and out of, Downtown. Seven in ten commuters arrive and depart during these periods.

Major Outbound Arteries Used by Commuters

Source: Transportation Study

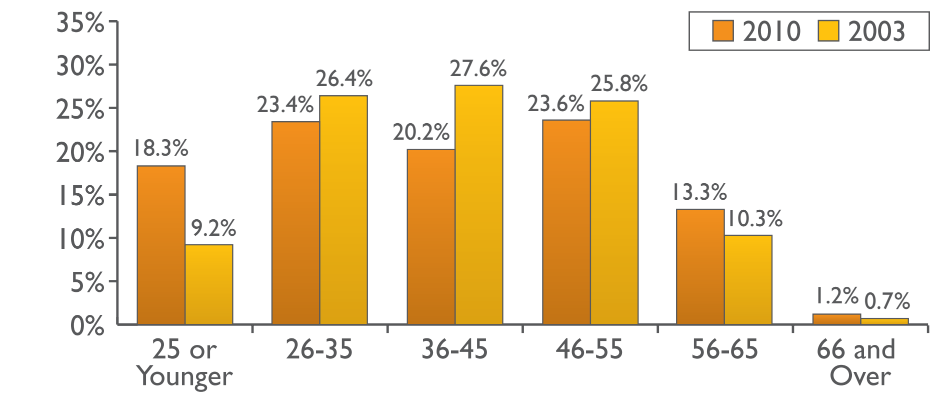


Outbound traffic patterns remain consistent from the 2003 study.

Who is a Commuter?

Age Comparison

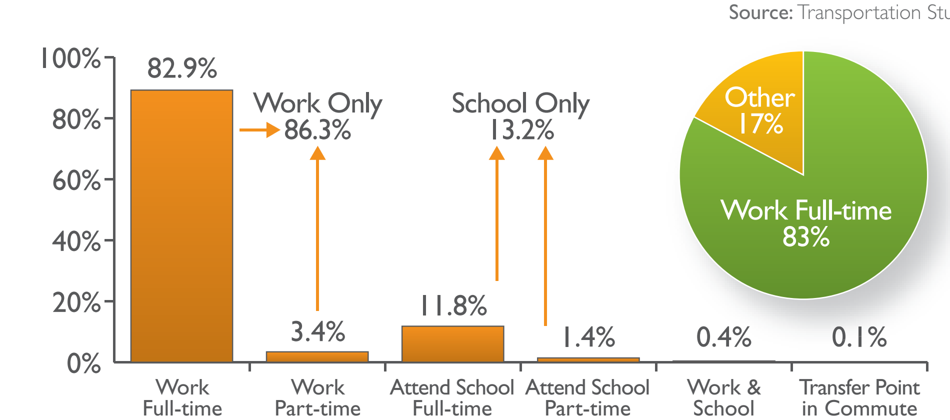
Source: Transportation Study



While the age profile has remained stable, 2010 respondents skew slightly younger since four in ten commuters are 35 or younger.

Purpose of Downtown Commute

Source: Transportation Study



By far, full-time work is the primary reason for commuting Downtown. Additionally, nearly 60% of pedestrians are Downtown for work. The second largest group, students, account for 10% of Downtown's pedestrian traffic.

Pedestrian Traffic Part of the Downtown Commute

Liberty and Penn Avenues are heavily populated with workers, while the Boulevard of the Allies is heavily traveled by students.

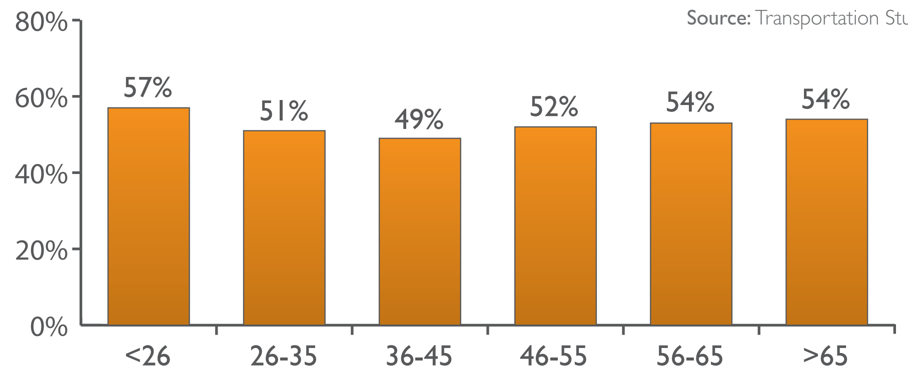
Market Square and Fifth Avenue are seeing increased traffic and both locations are among the busiest pedestrian traffic areas because of the recent revitalization of the area.

Weekday foot traffic peaks at 8:15 a.m., 12:15-12:45 p.m., and again from 4:45-5:15 p.m., which is a traditional pattern. The largest peak occurs during the "lunch hour."

Public Transportation Rider Profile

Age of Transit Riders

Source: Transportation Study

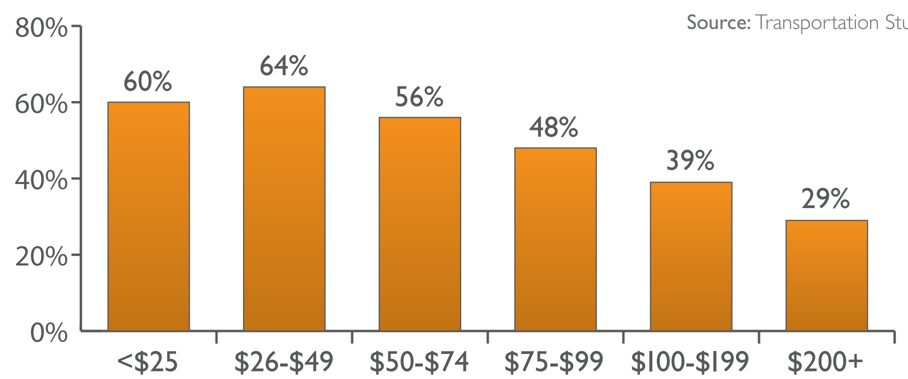


Youngest and oldest age groups are more likely to use transit options.

Public Transportation Rider Profile

Household Income of Transit Riders

Source: Transportation Study



Transit usage is negatively correlated with household income.

Public Transit Demographics:

While female full-time workers are more likely than male counterparts to use transit, full-time male students are more likely than female full-time time students to use public transit.

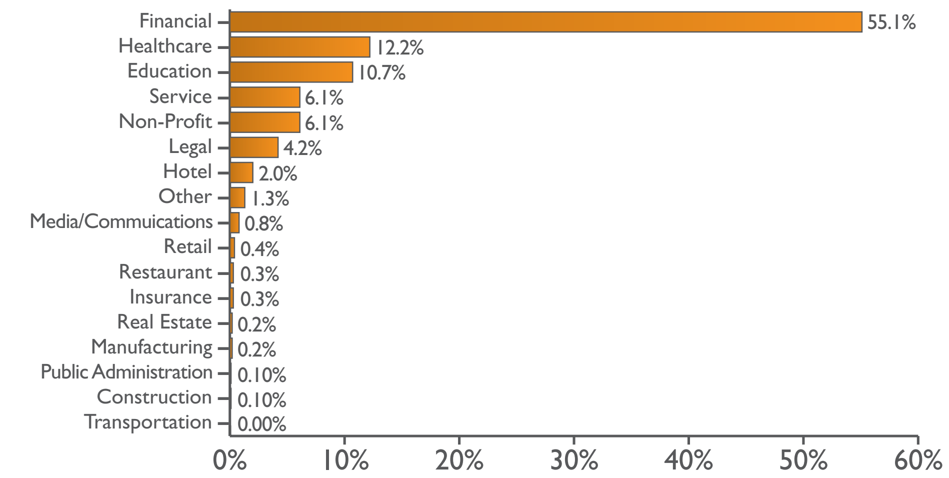
There are minimal differences in transit use by size of company / organization. However, one noticable pattern is that transit usage by employees in smaller firms is less than those in mid-size firms.

Commuters By Industry

Commuters' Employers – Company Type

Full-time & Part-time Workers

Source: Transportation Study



Commuters by industry parallel the overall Downtown workforce industries.

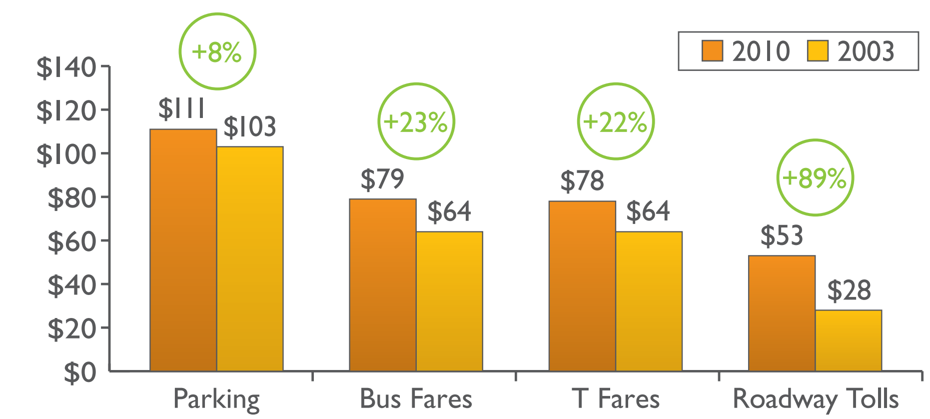
Top "Other" mentions include:
- Accounting
- Government
- Entertainment
- Marketing
- Architecture
- Consulting
- Professional
- Software development

Increasing Commuting Costs

Cost to Commuters Per Month

Source: Transportation Study

Average Monthly Costs to Commuters



Commuting costs have risen between 8% and 89%, depending on the type of transportation expense.

In terms of dollars, this increase represents an $8 - $25 per month.

Public transit users are spending $15 more a month on fares in 2010.

Additional research information and full research reports for each study can be found on the Pittsburgh Downtown Partnership's website:
www.DowntownPittsburgh.com/About-PDP/Research-and-Reports

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