2020 DOWNTOWN PITTSBURGH RESIDENT SURVEY OVERVIEW

PITTSBURGH DOWNTOWN PARTNERSHIP

ABOUT THE SURVEY

The Pittsburgh Downtown Partnership (PDP) conducts a resident survey every two years that serves as a tool to gather primary data regarding the feedback and opinions of residents who reside 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, programming efforts, and event planning. The 2020 resident survey is the sixth 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 2020 Resident Survey was open to residents electronically from February 20, 2020 through March 20, 2020. Notice of the survey was distributed with assistance of property/building managers and through direct postcard mailings to all units in multi-family properties. A total of 530 surveys were completed and one $100 gift card was awarded to a randomly selected survey respondent.

RESULTS BY SECTION

DEMOGRAPHICS

- 71% of residents who took the survey currently reside in the Golden Triangle while 29% of respondents live in periphery areas of Greater Downtown including: Strip District (24.5%), Uptown (1.8%), and North Shore (3.1%).
- The majority of respondents who completed the survey identity as female (56%), while 44% identity as male. About 51% of residents who took the survey were millennials (ages 23-38 years old). The majority of respondents were White (88%), with 5% Asian, 4% Hispanic/Latino, and 4% Black/African American.
    - *Compared to 2018, there are 11% more millennials that responded to the survey.*
- 86% of residents have at least a four-year college degree (45% Bachelor Degree, 27% Master Degree, and 14% Doctorate Degree). 23% of residents reported total household earnings of $101k-$150k, a 4% increase compared to 2018.
- Households of 1 or 2 people make up 93% of survey respondents, 49% were single and 45% were either married or living as a couple.
- 57% of residents reported that they do not own a pet of any kind.
    - *There has been a steady increase in pet ownership year over year from 2012 to 2020, with less people reporting they do not own any pets. (2012-64%; 2016-62%; 2018-60%)*
- The top three industries where residents work are professional, scientific, and technical services (20%), finance and accounting (16%), and healthcare/social work (14%). 9% are retired and 8% are students. 86% of respondents work in Greater Downtown (zip codes: 15222, 15219, 15212).
    - *Percentage of residents who work in Greater Downtown increased by 12% since 2018.*

DOWNTOWN LIVING AND SAFETY

- The top three reasons residents cited for choosing to live Downtown include: proximity to work (32%), desire to live in an urban environment (28%), and convenience (11%).
- 82% of respondents reported that they currently rent property and 18% own their home. Of the subset of residents who currently rent property, 43% of them would consider purchasing residential real estate Downtown.
- 33% of residents moved Downtown from outside of Pennsylvania, 19% moved from the surrounding suburbs, and 19% moved from other City of Pittsburgh neighborhoods.
- Oakland and Highland Park were the most common locations other than Downtown that residents considered in their housing search, each representing 34% of responses. Areas of Greater Downtown located outside of the CBD including the Strip District (15%) and the North Shore (33%) were in the top neighborhoods considered, the North Shore being third. 19% of respondents considered no other area in their search other than Downtown.
- On a numerical scale of 1 - "not satisfied at all" to 9 - "very satisfied," residents showed a weighted average of 7.3 satisfaction with their property/building choice. The largest subset of residents (36%) ranked their satisfaction with their property/building as a 9 "very satisfied." On average, residents ranked their satisfaction with living Downtown a 7.4 with 40% of residents indicating that they are "very satisfied" (9) with their decision to live Downtown. 28% of residents anticipate living Downtown for 10+ years; the average length of years anticipated to live Downtown is 5.5 years.
    - *Average satisfaction with building/property in 2020 was 7.3, 8.2 in 2018, and 7.3 in 2016.*
    - *Average satisfaction with decision to live Downtown in 2020 was 7.4, 8.2 in 2018, and 7.3 in 2016.*
    - *Average years anticipated to live Downtown in 2020 was 5.5, 6.8 in 2018 and 5.5 in 2016.*
- Proximity to work (45%), bars and restaurants (45%), walkability (44%), convivence (38%), and arts and culture (28%) were considered the top five positive factors of living Downtown by respondents. Additionally, 63% of respondents believe that Downtown is heading in the right direction, with 25% being unsure of the direction Downtown is heading and only 12% believing Downtown is heading in the wrong direction.
- Residents consider the top five negative factors of living Downtown to be lack of a grocery store (59%), homelessness (36%), panhandling (33%), availability of parking (24%), and cost of living (22%). 10% of respondents report themselves or someone in their household being a victim of a crime Downtown, the same percentage as in 2018. 48% of respondents reported feeling safe most of the time in Downtown and 11% reported always feeling safe in Downtown. 84% of respondents feel 'safe' or 'very safe' during the day Downtown while 38% feel the same at nighttime.
    - *Lack of a grocery store has been ranked as the primary negative impact on residents' quality of life since 2012.*
- Point State Park, Market Square, and the Allegheny Riverfront Trial were reported as residents' top three favorite places that they enjoy visiting Downtown.

RETAIL AND SPENDING

- A grocery store (86%), department store (43%), and a clothing/accessories retailer (31%) were the top three most desired retail categories that residents want Downtown. Specific retail brand that respondents mentioned most include: Target (77%), Trader Joe's (36%), and Giant Eagle (32%).
- On average, Downtown residents spend $300 a month at restaurants. Residents reported that they spend just $56 per month on services (dry cleaning, fitness, hair salons, etc.), $49 per month on Downtown retailers (shoes/clothes, department stores, etc.), $73 per month on entertainment (theater, live music, etc.), and $65 per month on sporting events.
    - *Spending on services in 2018 was $181 per month.*
    - *Spending on restaurants remained the same between 2018 and 2020 at about $300 a month.*
- 71% of residents reported buying their groceries from a store not located in Downtown and 21% reported ordering groceries online and having them delivered. Just 4% reported buying groceries from a store located Downtown. Only 19% of residents reported that they are able to find everything they are looking for when shopping 'often' or 'all or almost every time'. 35% reported they 'sometimes' find everything they are looking for and 39% reported they 'rarely' or 'never' find everything they are looking for.
    - *The most common items that cannot be found Downtown are grocery items/fresh produce (76%).*
- Casual dining is the most requested type of restaurant that residents would like to see Downtown, chosen by 37% of respondents, followed by Diner style (12%) and no additional restaurant requests (15%).

TRANSPORTATION

- 50% of all residents selected walking as a mode of transportation that they use, followed by 27% using a personal vehicle for commutes. A secondary mode of transportation was not applicable for 23% of residents; 20% use their personal vehicle as a secondary mode of transportation, followed by walking (18%) and Uber/Lyft (17%).
- 62% of residents lease at least one parking space. Of this subgroup, 85% lease one space 8% lease two spaces.
- 61% of residents showed some level of satisfaction (somewhat satisfied, satisfied, or very satisfied) regarding the availability of parking Downtown; 21% of residents do not use Downtown parking.
- 68% of residents do not use protected bike lanes Downtown, however, 46% of residents would like to see the bike land network expanded, with the most requested expansion being on Penn Avenue into Lawrenceville.

CONCLUSION

The 2020 Downtown Resident Survey showed many consistencies compared to surveys conducted in prior years but also showed a few demonstrable differences. There were a slightly lower number of responses compared to the 2018 survey (n= 530, 2020 vs. n= 567, 2018), property representation from multifamily properties varied in the 2020 survey compared to 2018 results, with the greatest differences being in representation from properties in the North Shore (3% of responses in 2020 vs. 18.5% in 2018) and an increase in representation from Strip District properties (24.5% in 2020 vs. 9% in 2018). Compared to the 2018 resident survey, there were slight variances in resident age (11% more millennials) household income, and an increase in percentage of residents who work in Greater Downtown by (+12% compared to 2018).

Results for reported average monthly spending at Downtown service, entertainment, and sporting events all showed decreased spending habits. The most notable category of decreased spending (-69%) was in the business services category which includes laundry services, beauty salons, and gyms. The reported decrease in consumer spending may have been in part influenced by news of COVID 19 in circulation throughout the duration of the survey. The survey was still active during the enforced shut down order of all non-essential businesses on March 15 by Allegheny County, which may have negatively impacted consumer's reported spending due to businesses closing, job insecurities, layoffs and furloughs, and a general sense of uncertainty in consumer spending for the foreseeable future.

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2020 DOWNTOWN PITTSBURGH RESIDENT SURVEY

Eighth & Penn Apartments

PITTSBURGH
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SUMMARY FINDINGS

Demographic Information

- 64 residential properties were represented
- 37% of people who took the survey were ages 25-34; 88% were white

Living Satisfaction

- 32% of residents chose to live Downtown to be closer to work
- Downtown's walkability, bars and restaurants, and proximity to work have the greatest positive impact on resident's quality of life

Public Spaces

- Point State Park and Market Square are resident's favorite public spaces
- 74% of people who took the survey attend Market Square Farmer's Market

Retail and Spending

- The most desired retailer residents want Downtown is a grocery store
- Residents spend an average of $544 a month at Downtown establishments

Transportation

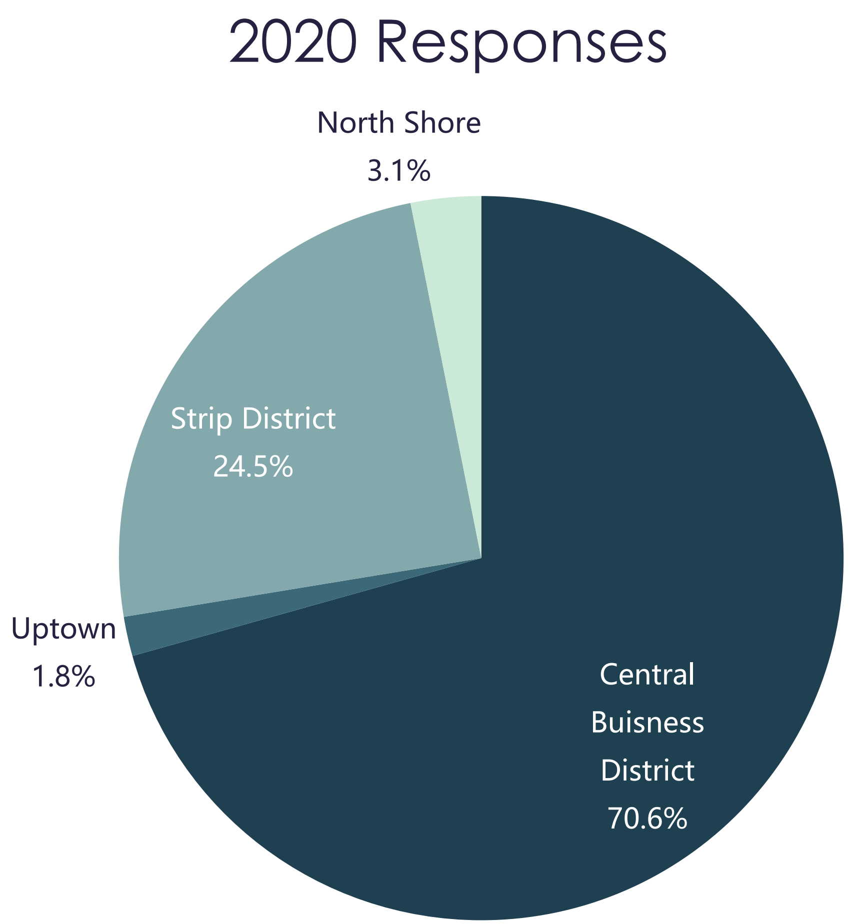
- Half of residents walk to work as their primary mode of transportation
- 46% of survey respondents would like to see the bike lane network expanded Downtown

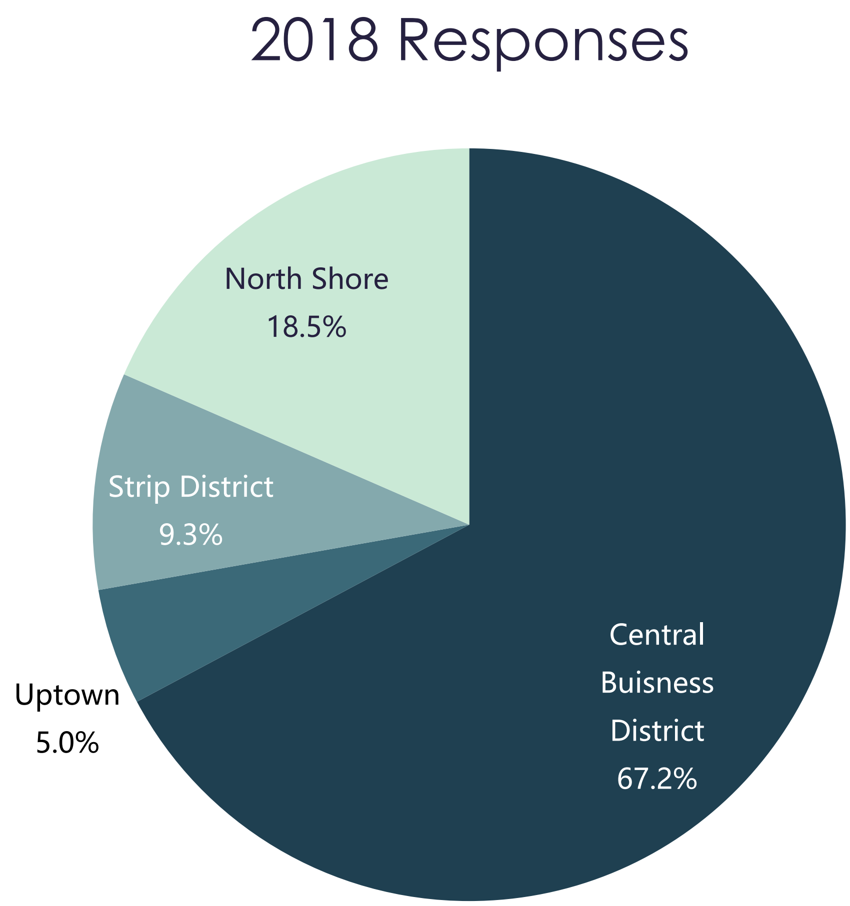
METHODOLOGY

2020 Resident Survey
Online survey open from 2/20/2020 to 3/20/2020
Direct mailing was sent to all property managers with a physical posters to hang in buildings
Distributed with assistance of property managers via email and direct postcards to all units in multi-family properties
530 surveys collected representing 64 properties in Greater Downtown
Incentive: $100 restaurant gift card raffle

DEMOGRAPHIC INFORMATION

DEMOGRAPHIC INFORMATION: **RESPONSES BY BUILDING**

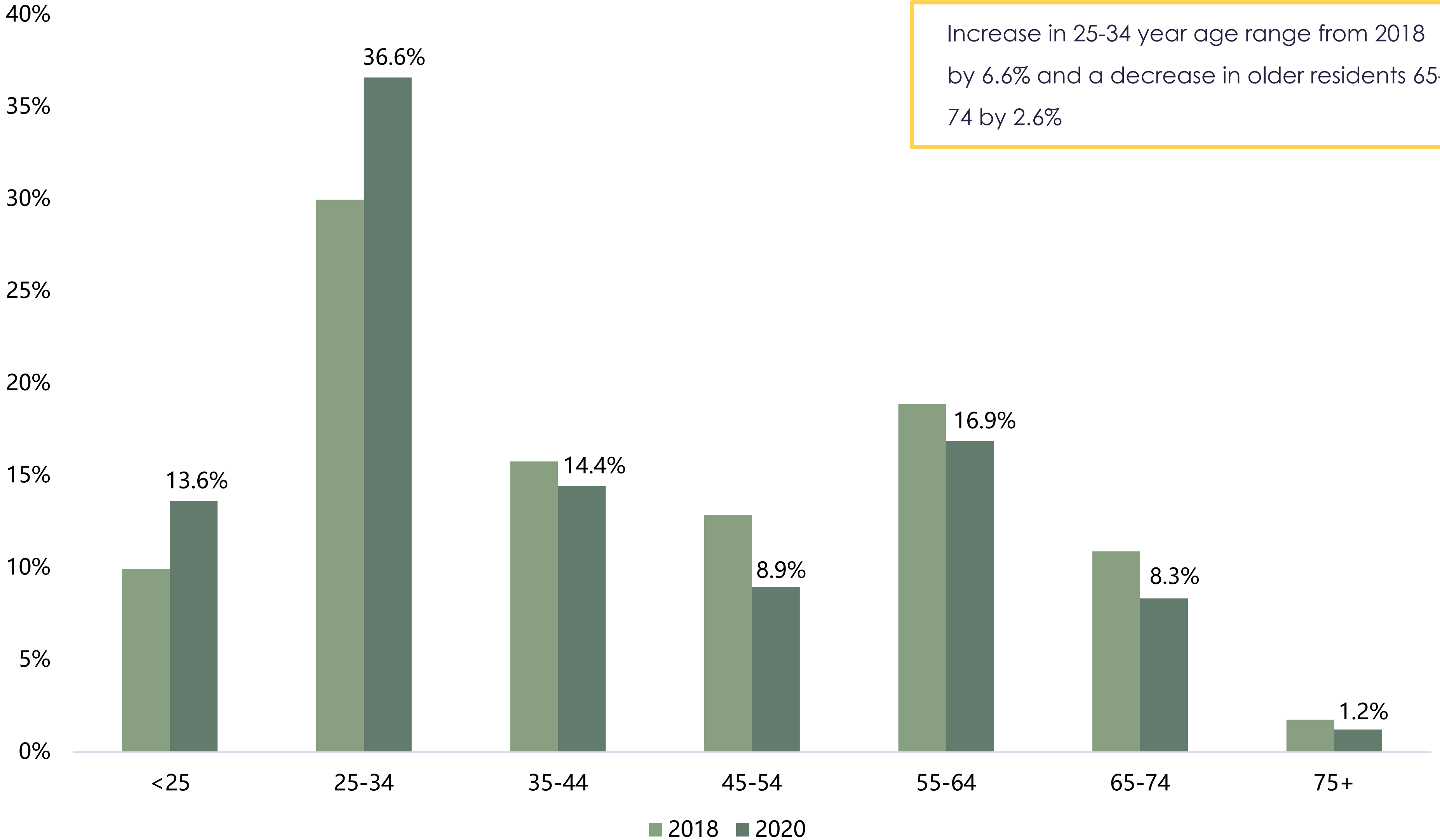




Q1: Please select your building address from the drop-down box below. If your building is not listed, please select "other" and enter your building name or street address below.
Number of respondents = n, n = 530

PITTSBURGH DOWNTOWN PARTNERSHIP

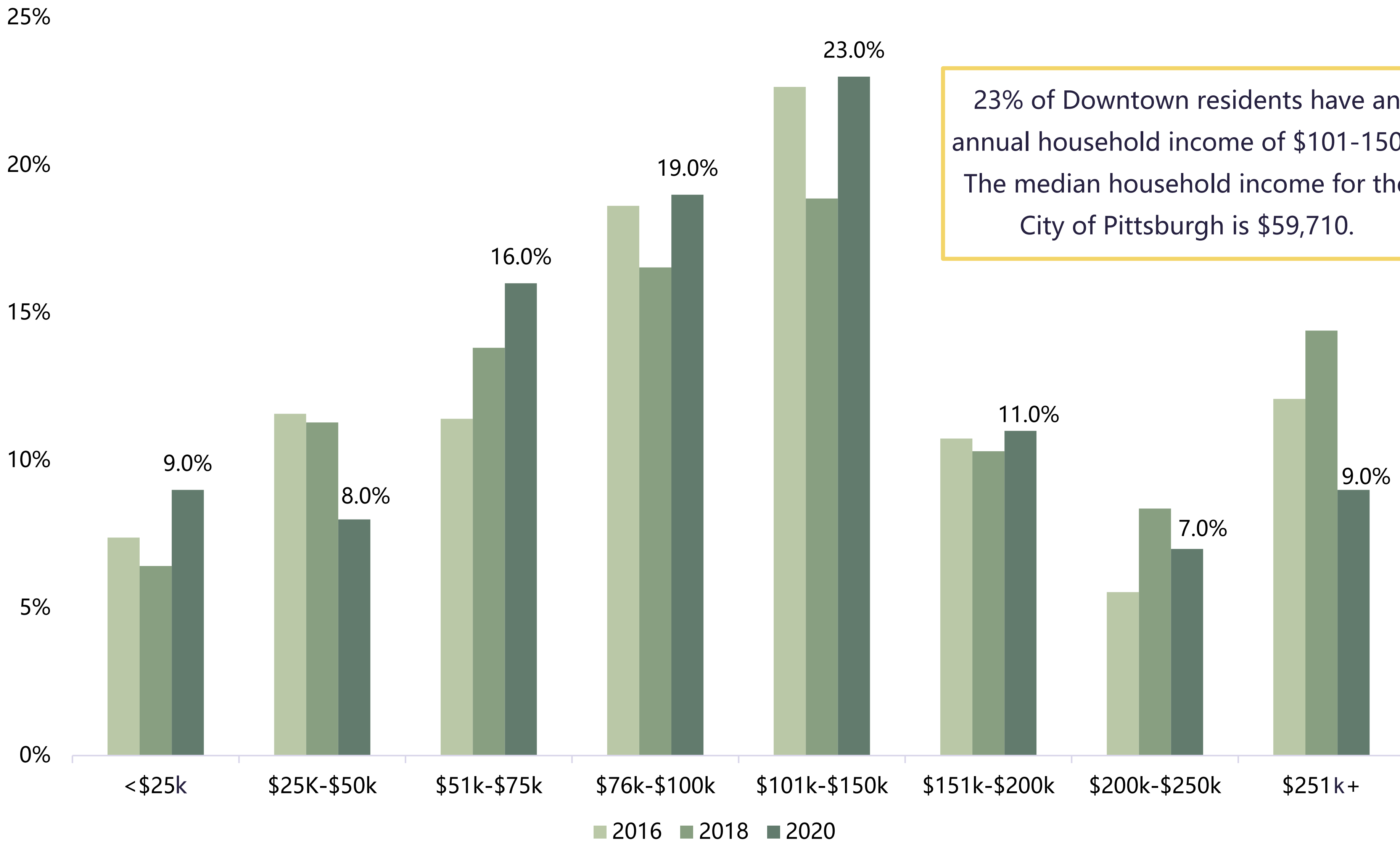
DEMOGRAPHIC INFORMATION: **AGE OF RESIDENTS**



Increase in 25-34 year age range from 2018 by 6.6% and a decrease in older residents 65-74 by 2.6%

Q47: Which range encompasses your age?
n = 492

DEMOGRAPHIC INFORMATION: **ANNUAL HOUSEHOLD INCOME**

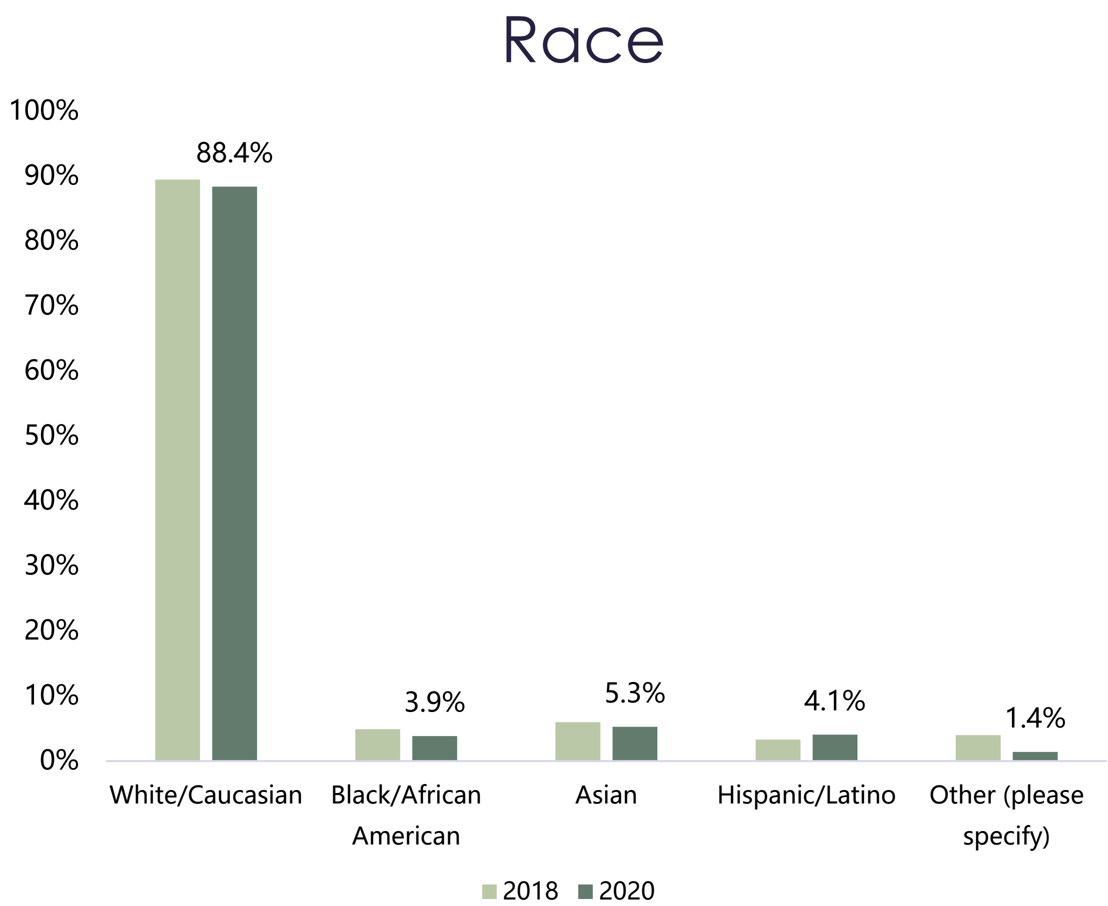


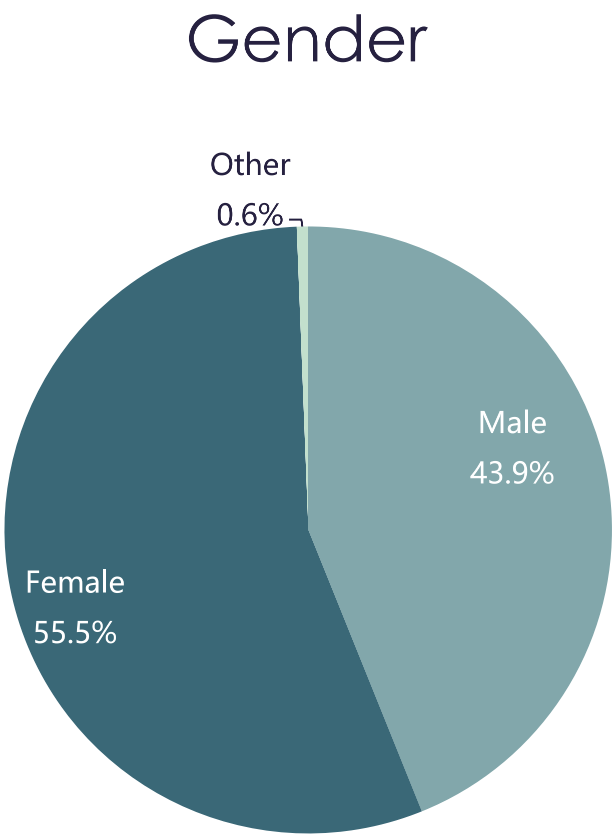
23% of Downtown residents have an annual household income of $101-150k. The median household income for the City of Pittsburgh is $59,710.

Q51: Which range encompasses your total annual household income?

n = 492

DEMOGRAPHIC INFORMATION: **GENDER AND RACE**





Q46: What gender do you identify most with?

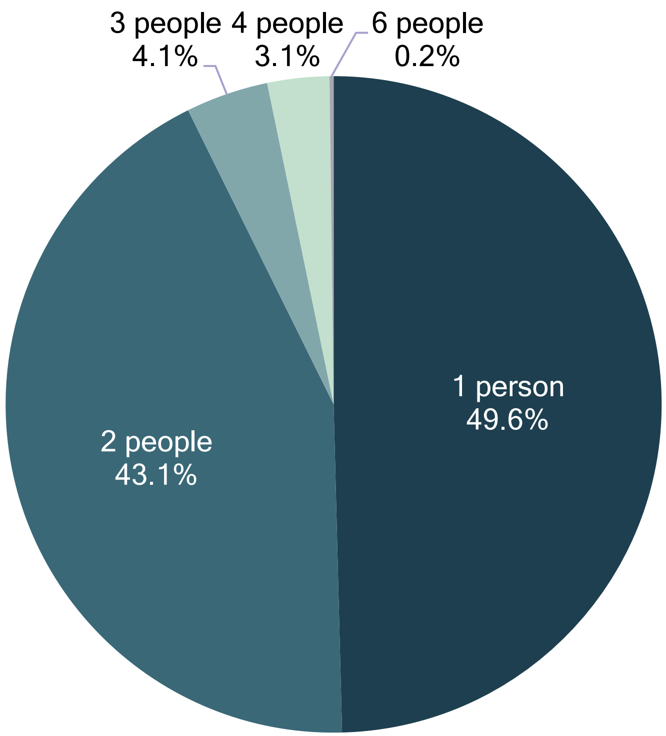
Q54: What category (or categories) best describe your race?

n = 492

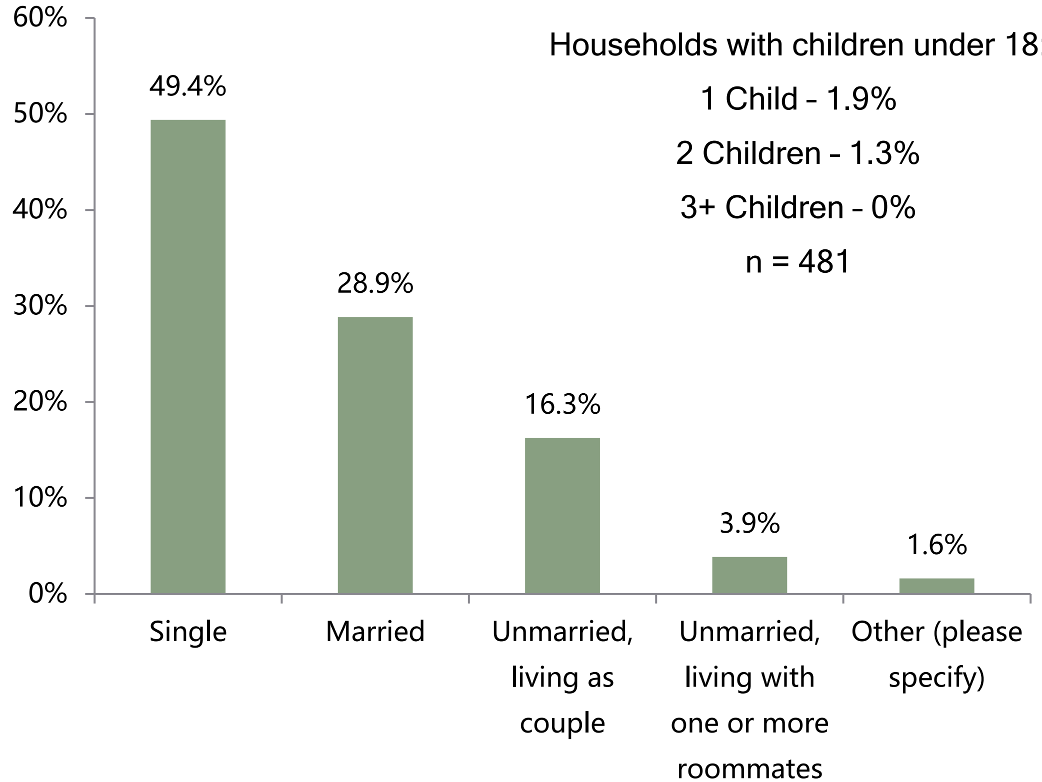
PITTSBURGH DOWNTOWN PARTNERSHIP

DEMOGRAPHIC INFORMATION: **HOUSEHOLD SIZE AND STATUS**

Household Size



Living Situation



Q48: Including yourself, how many people live in your household?

Q53: Which best describes your living situation?

n = 492

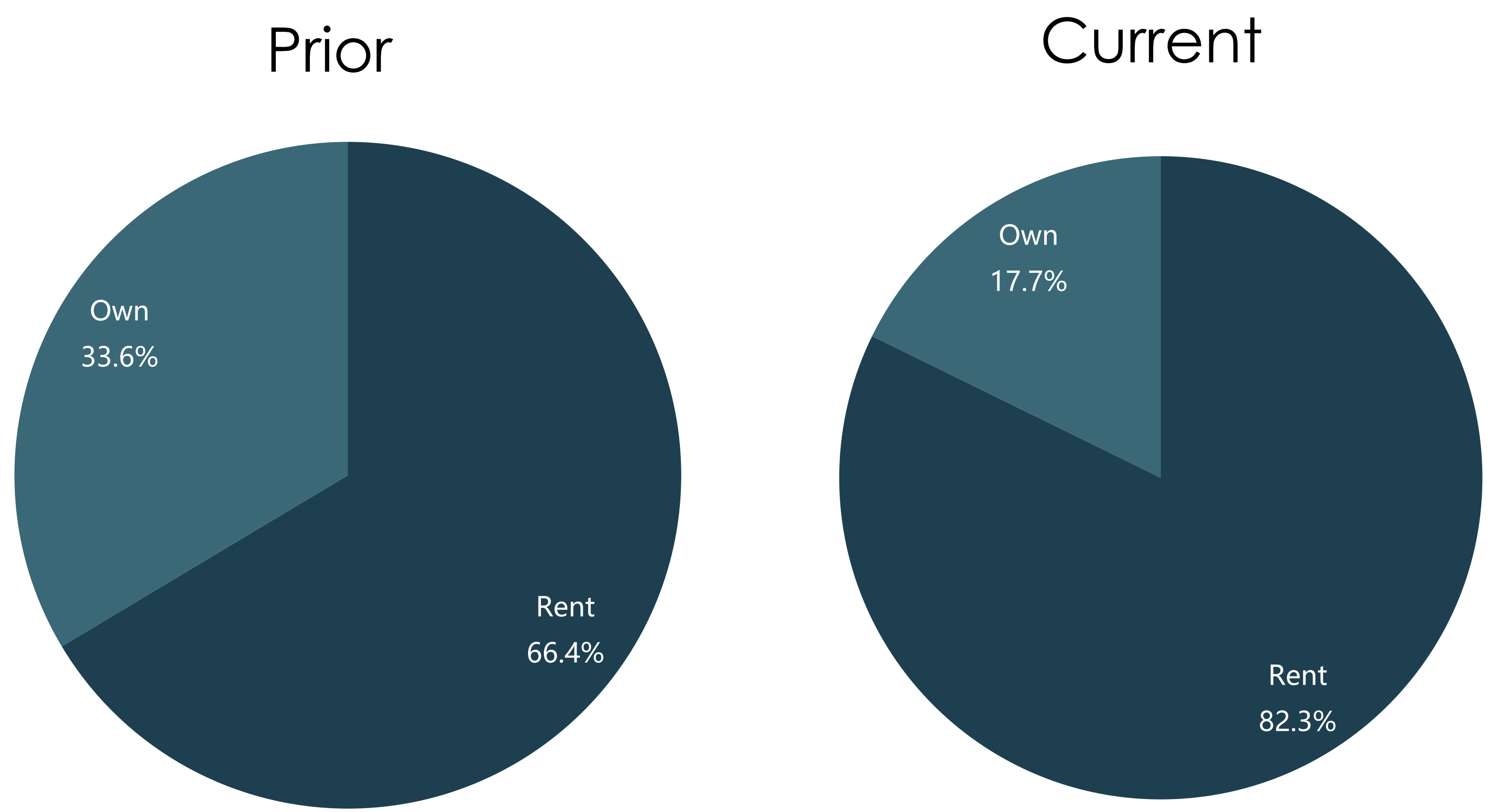
DEMOGRAPHIC INFORMATION: **PET OWNERSHIP**

Type of Pet	2016	2018	2020
Owns Dog(s)	22%	22%	22%
Owns Cat(s)	16%	17%	19%
Owns Other Pet	1%	1%	2%
Does Not Own Any Pet	62%	60%	57%
Average Number of Pets			
Dogs	1.1	1.2	1.4
Cats	1.4	1.4	1.7

Q52: How many pets live in your household?

n = 454

DEMOGRAPHIC INFORMATION: **PRIOR VS. CURRENT RESIDENCE**



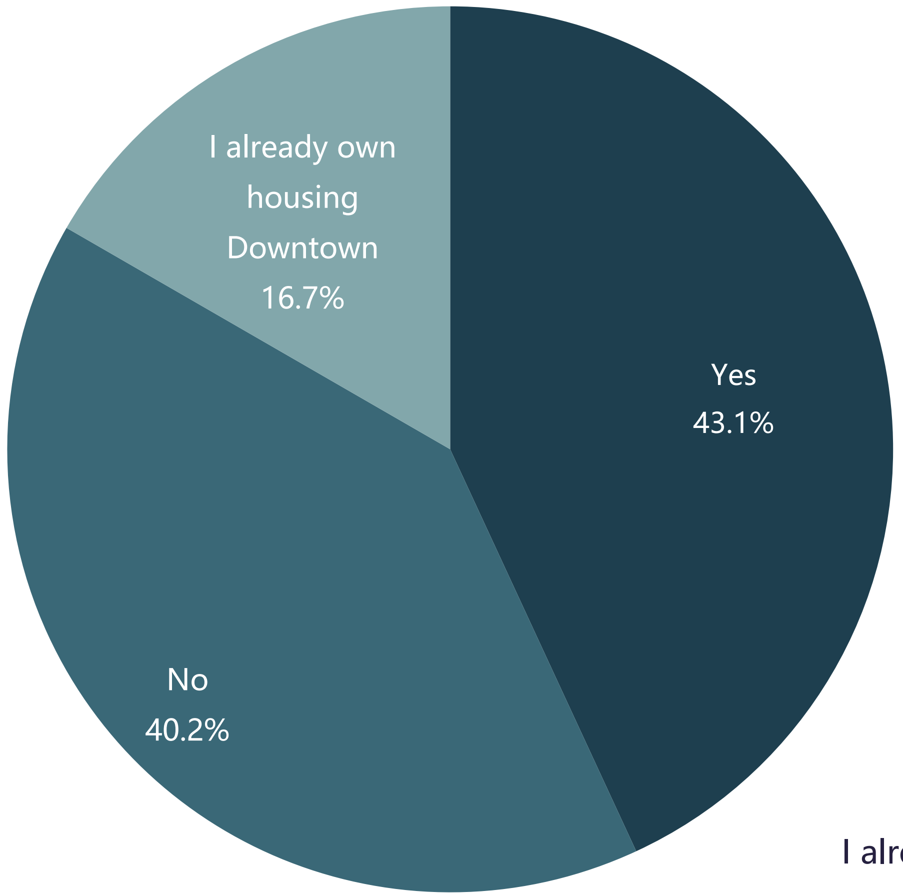
Q6: Did you rent or own your prior residence?

Q5: Do you rent or own your current residence?

n = 530

PITTSBURGH DOWNTOWN PARTNERSHIP

DEMOGRAPHIC INFORMATION: **% OF RENTERS WILLING TO PURCHASE RESIDENTIAL REAL ESTATE DOWNTOWN**



2018 Responses

Yes: 47.7%

No: 31.7%

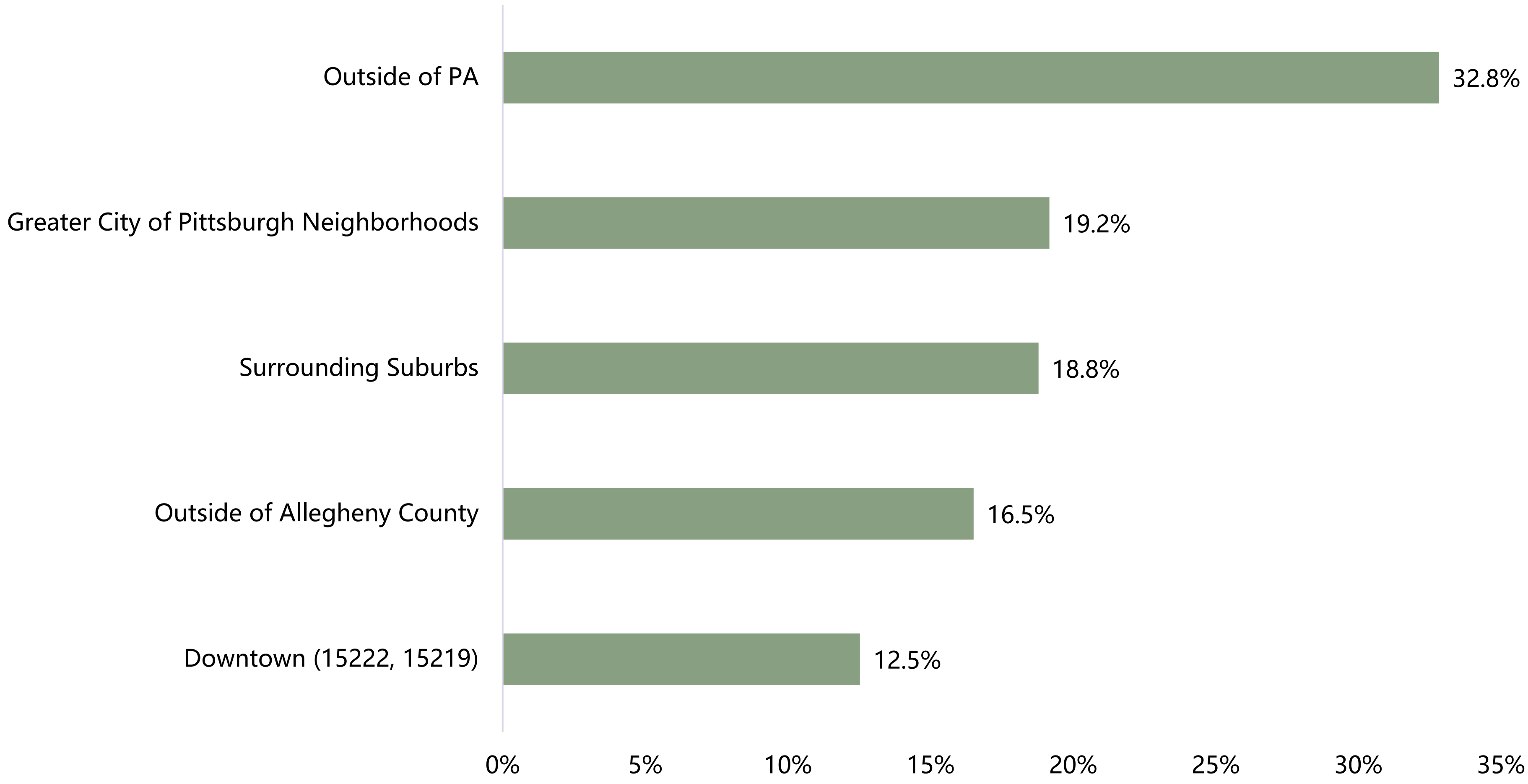
I already own housing Downtown: 20.6%

n = 539

Q8: If you rent, would you consider buying residential real estate in Downtown?

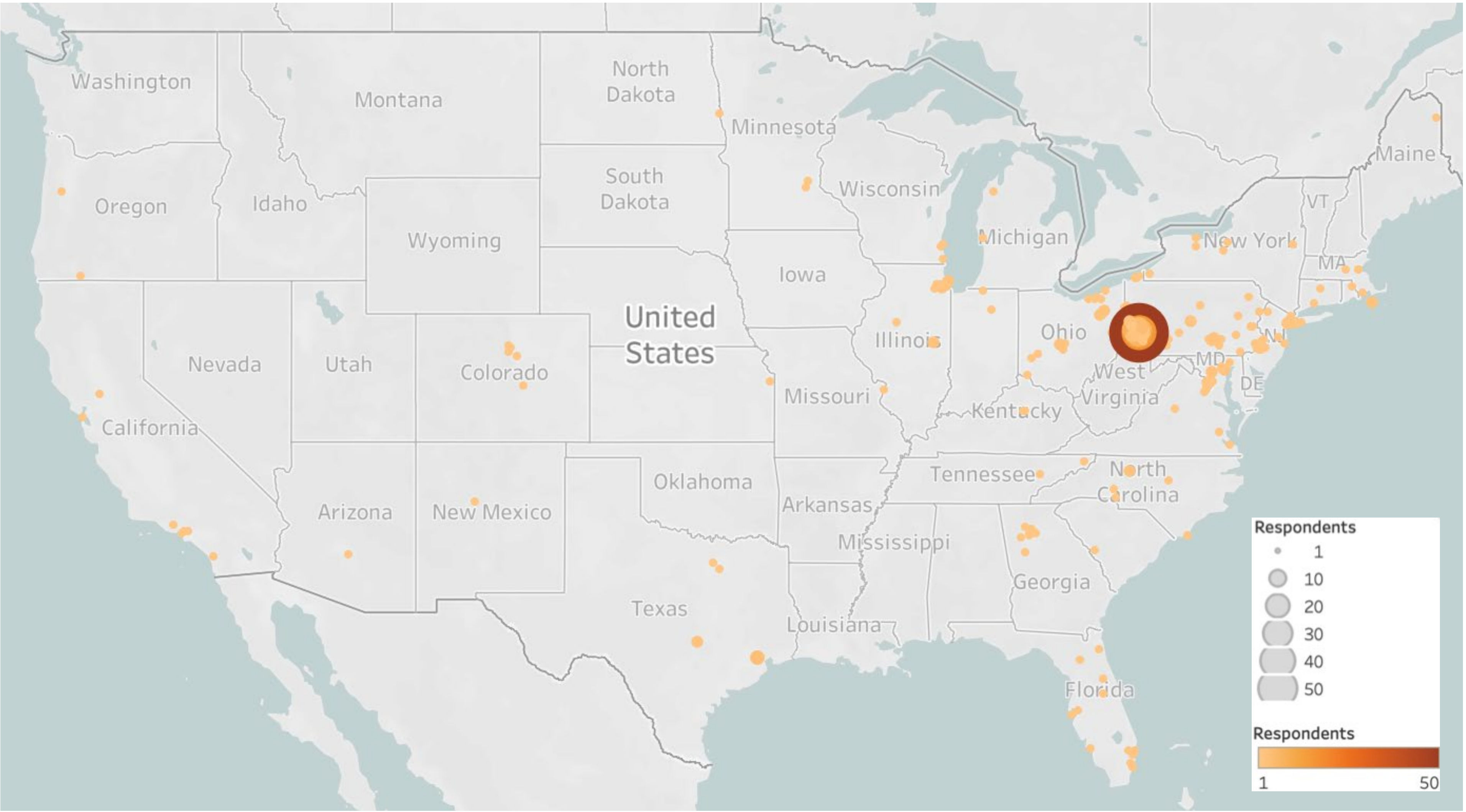
n = 522

DEMOGRAPHIC INFORMATION: **LOCATION OF PRIOR RESIDENCE**



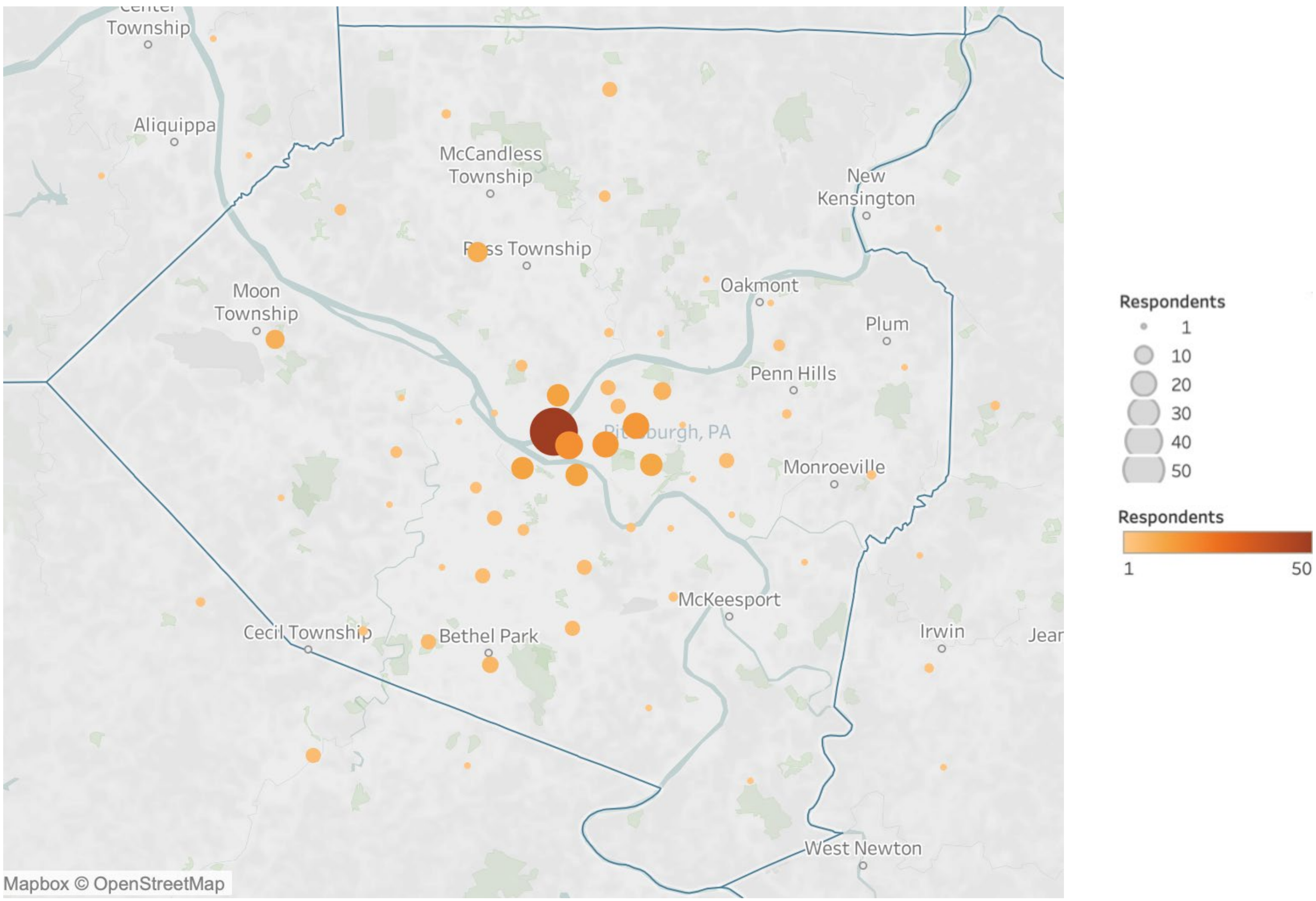
Q7: In what area did you live most recently prior to your current Downtown residence?
n = 530

DEMOGRAPHIC INFORMATION: **LOCATION OF PRIOR RESIDENCE MAP**



Q7: In what area did you live most recently prior to your current Downtown residence?
n = 530

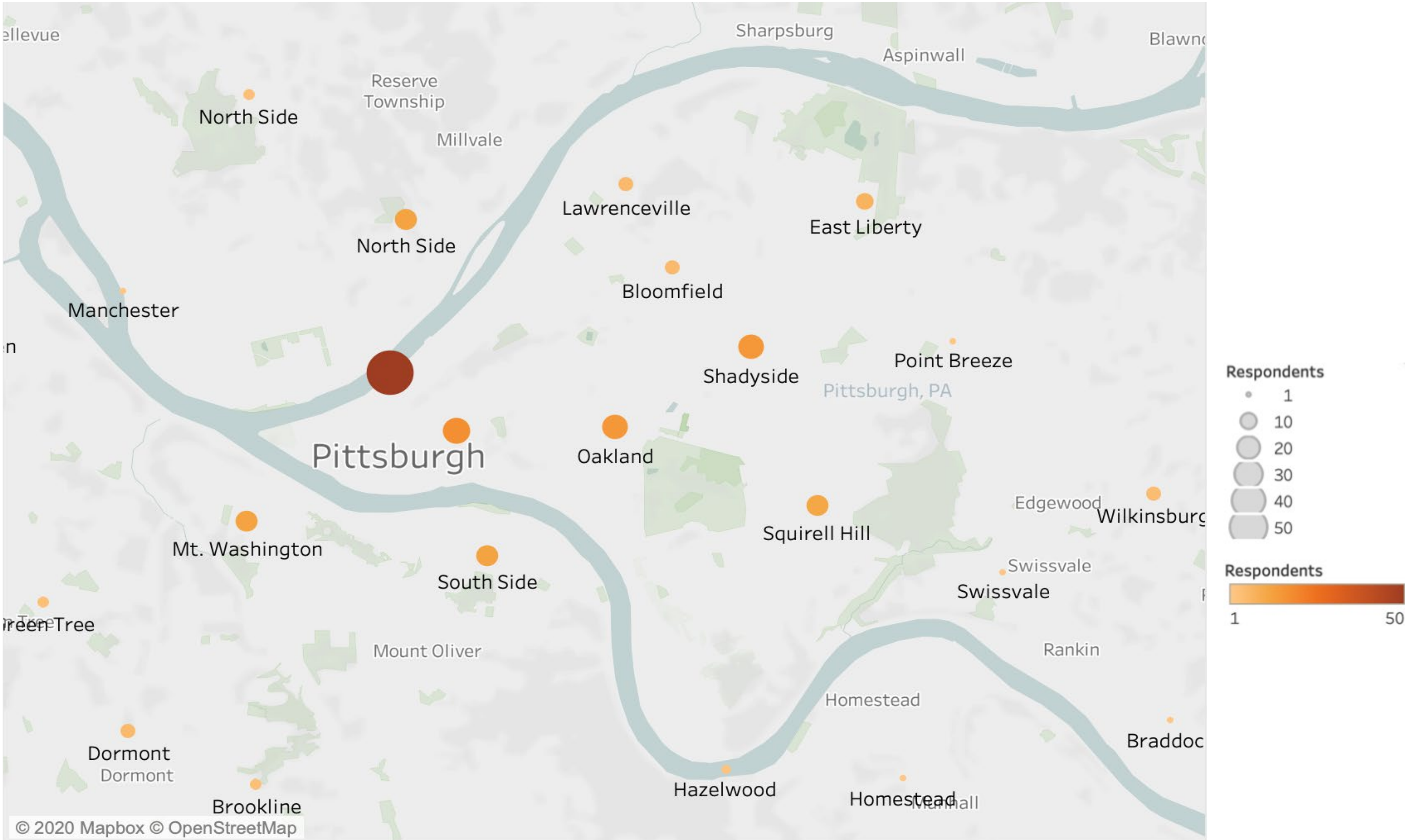
DEMOGRAPHIC INFORMATION: **LOCATION OF PRIOR RESIDENCE, ALLEGHENY COUNTY MAP**



Q7: In what area did you live most recently prior to your current Downtown residence?

n = 530

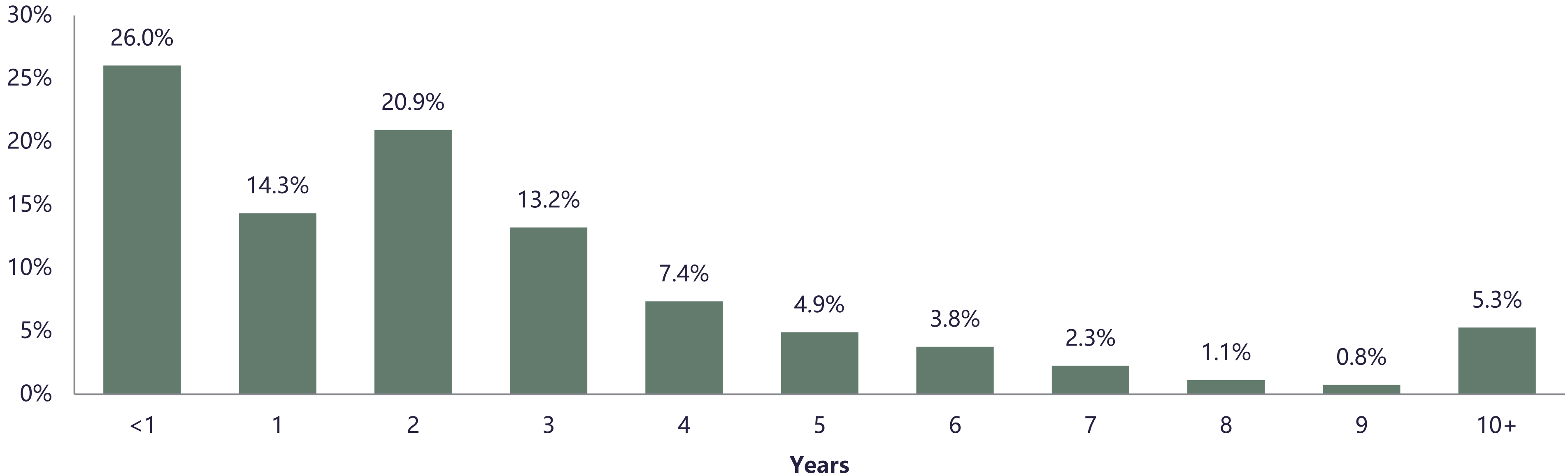
DEMOGRAPHIC INFORMATION: **LOCATION OF PRIOR RESIDENCE, CITY OF PITTSBURGH MAP**



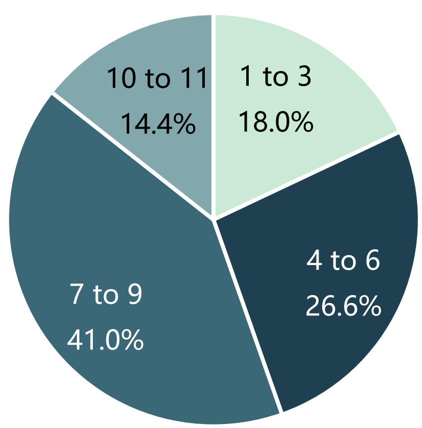
Q7: In what area did you live most recently prior to your current Downtown residence?

n = 530

DEMOGRAPHIC INFORMATION: **TENURE AT CURRENT RESIDENCE**



Number of Months for <1 Year Tenure

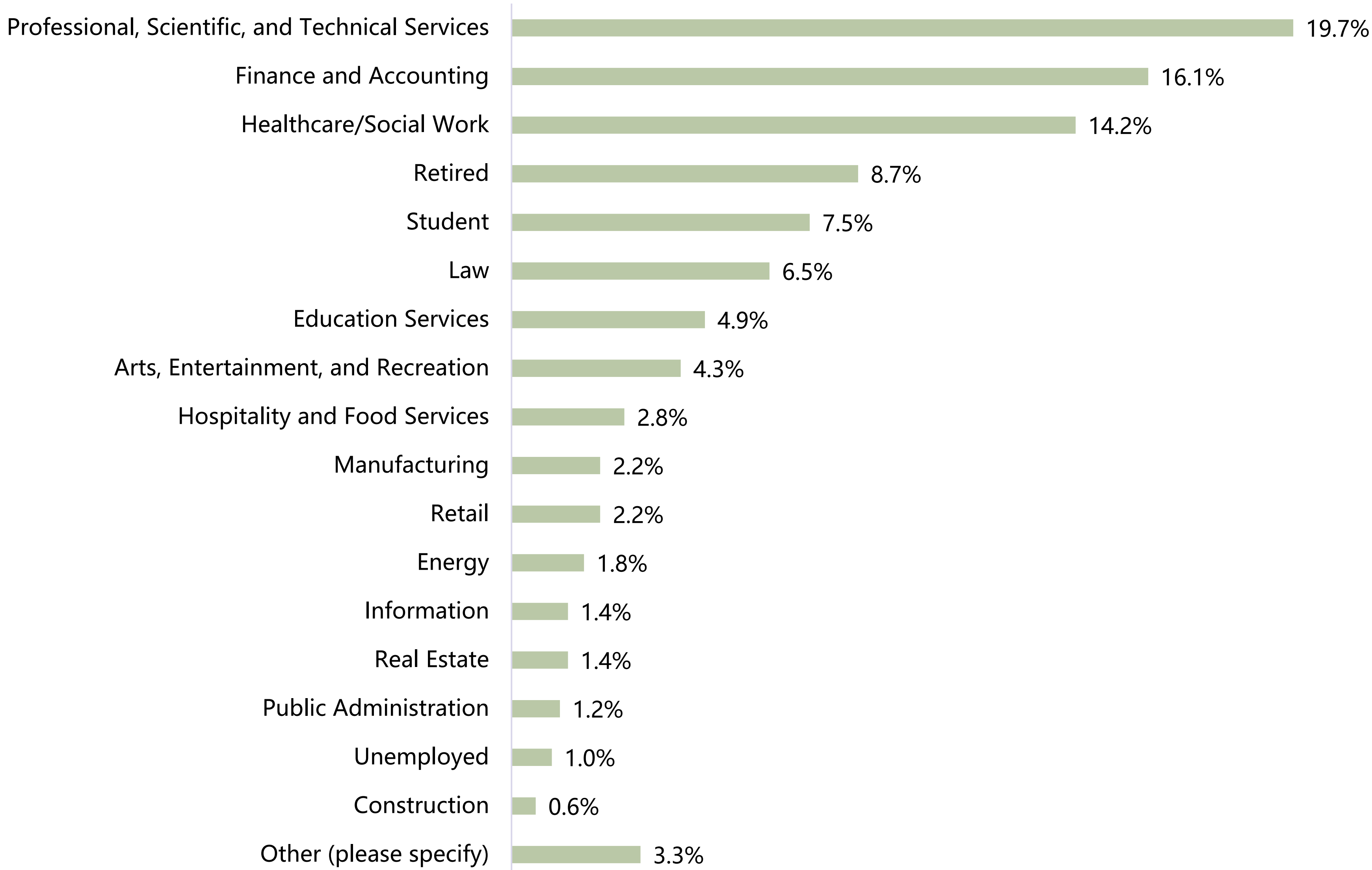


Average Years Spent at Residence

2020	2.8
2018	2.8
2016	2.7
2012	3.5

Q3: How long have you lived at your current residence?
n = 530

DEMOGRAPHIC INFORMATION: **PROFESSION**



Q55 n = 492

* Industries classified using the United States Census Bureau 2012 North American Industry Classification System

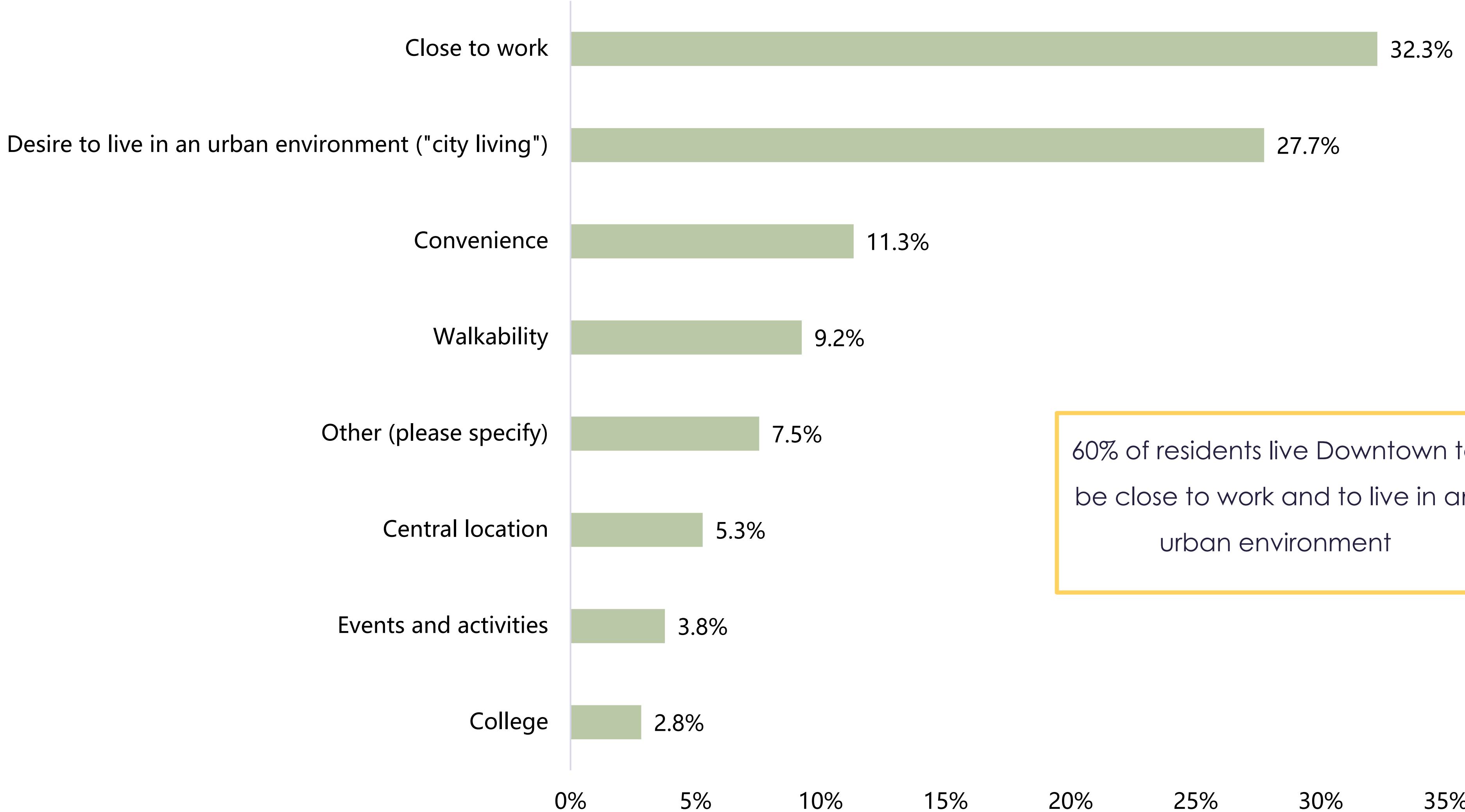
DEMOGRAPHIC INFORMATION: **TOP FIVE WORK ZIP CODES**

2020		2018	
15222 (Downtown, Strip District)	51.9%	15222 (Downtown, Strip District)	44.3%
15219 (Downtown, South Shore, Uptown, Lower Hill, Hill District)	14.7%	15219 (Downtown, South Shore, Uptown, Lower Hill, Hill District)	21.9%
15212 (North Shore)	5.4%	15212 (North Shore)	7.4%
15213 (Oakland)	4.1%	15213 (Oakland)	5.8%
15201 (Lawrenceville)	1.8%	15108 (Coraopolis, PA, Moon, PA)	1.8%
Outside of PA	0.7%	Outside of PA	1.3%
Remotely	1.1%	Remotely	1.3%
	n = 443		n = 447

Q56: What is the zip code of your workplace/school? If your workplace/school has multiple sites, please select the zip code where you are located most frequently.

LIVING SATISFACTION

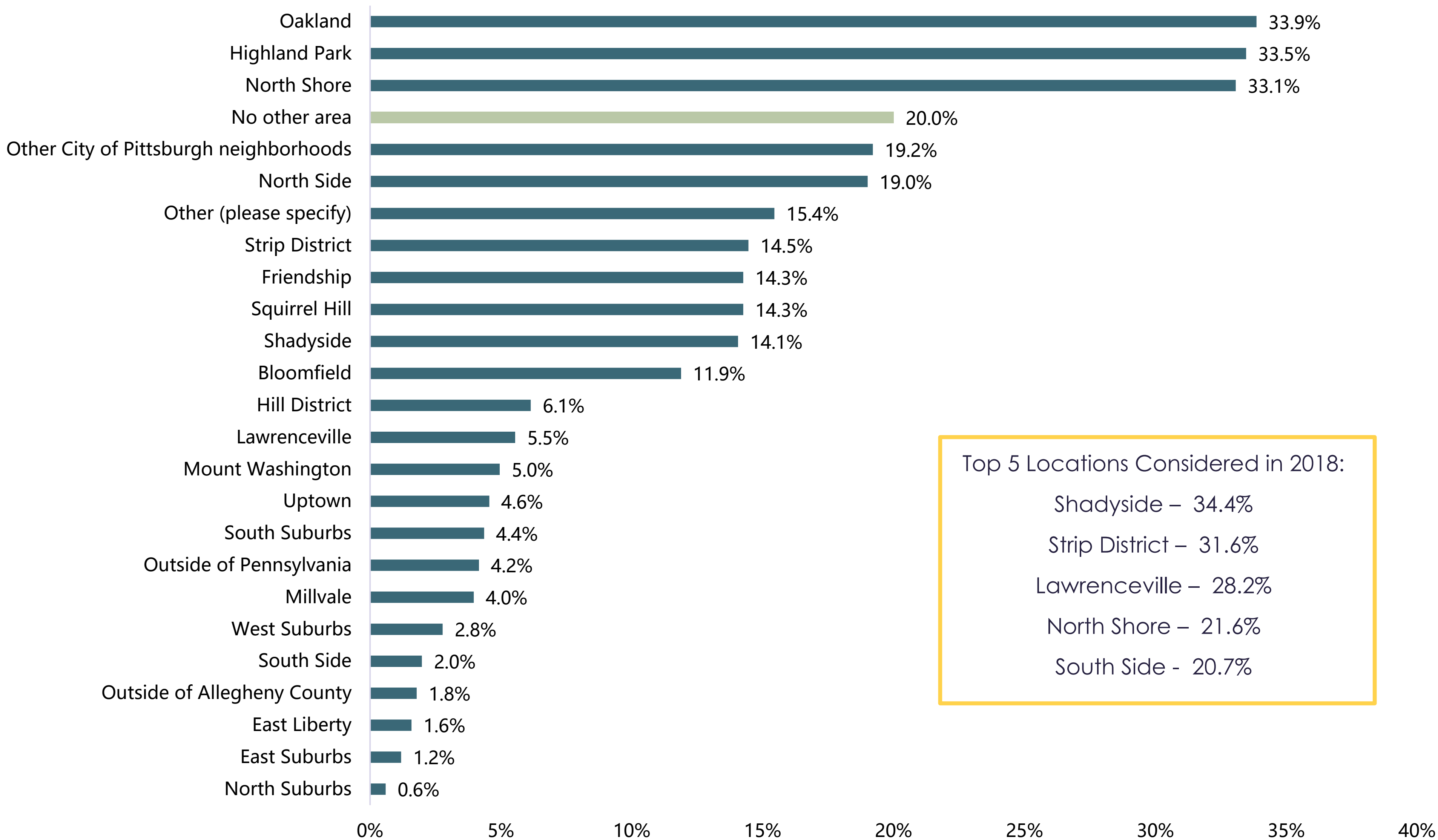
LIVING SATISFACTION: **REASONS FOR LIVING DOWNTOWN**



60% of residents live Downtown to be close to work and to live in an urban environment

Q9: What was the primary reason you chose to live Downtown?
n = 530

LIVING SATISFACTION: OTHER LOCATIONS CONSIDERED



Top 5 Locations Considered in 2018:

Shadyside – 34.4%

Strip District – 31.6%

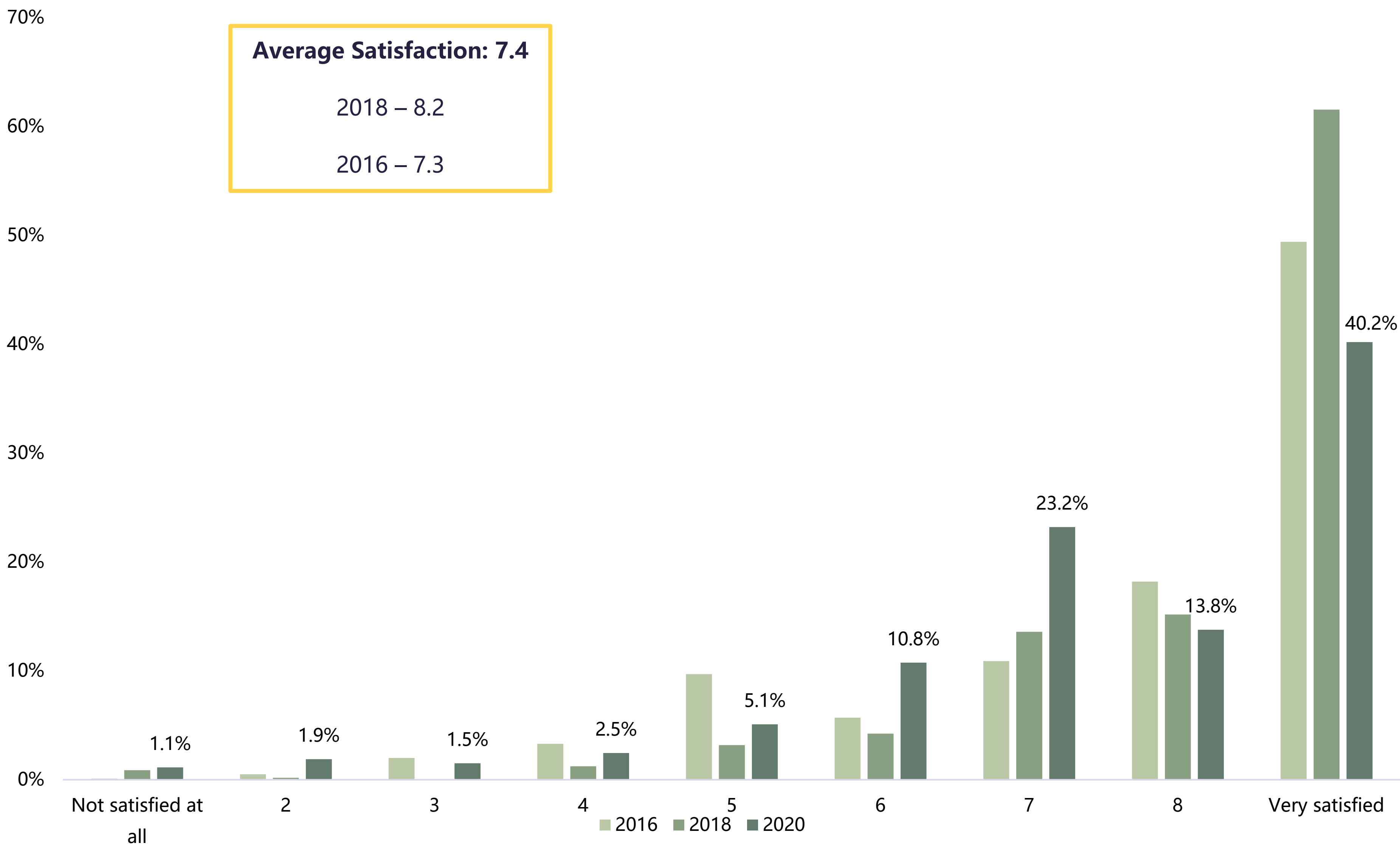
Lawrenceville – 28.2%

North Shore – 21.6%

South Side - 20.7%

Q10: Prior to moving Downtown, what other neighborhoods/municipalities were included in your housing search? Please select all that apply. n = 505

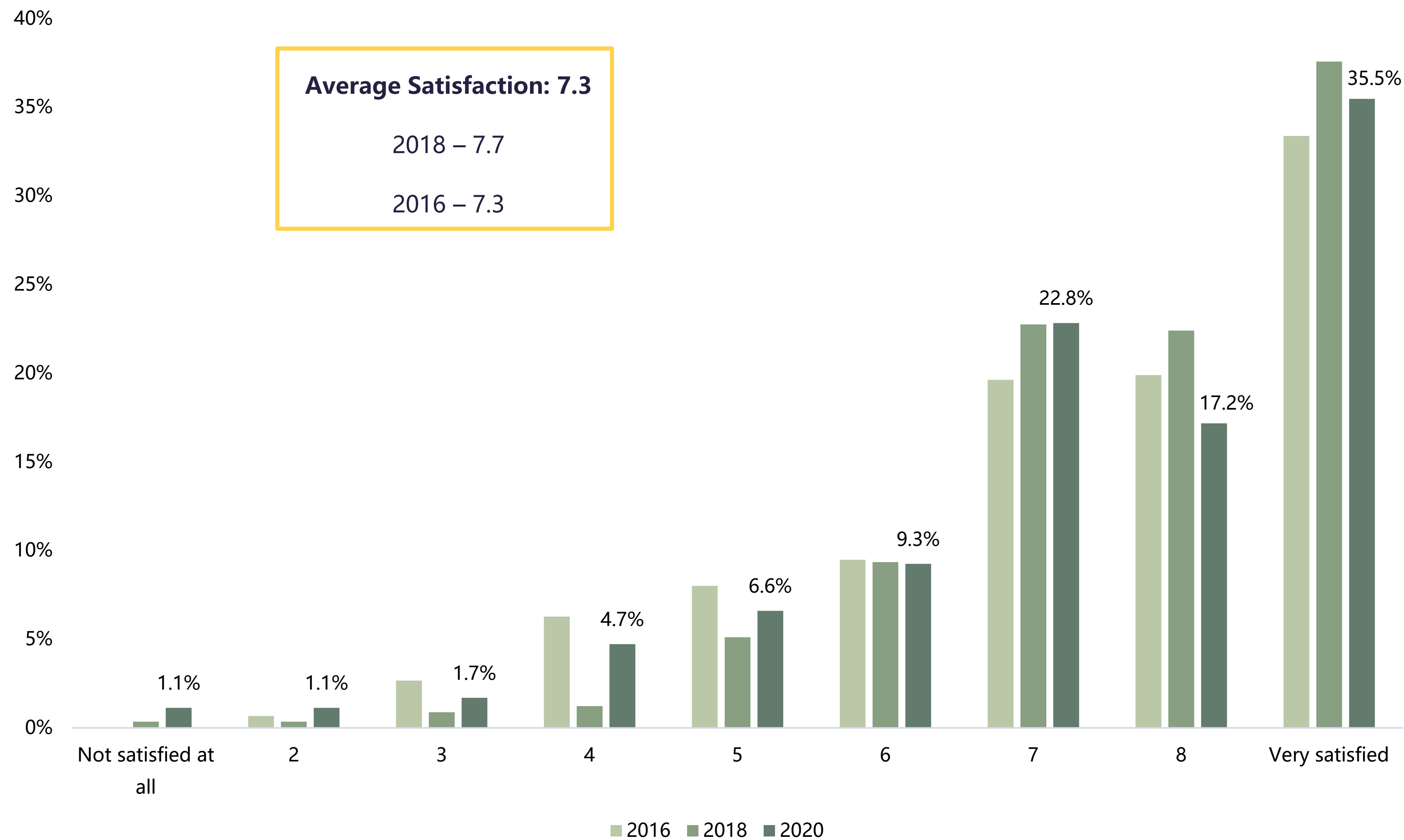
LIVING SATISFACTION: **SATISFACTION WITH LIVING DOWNTOWN**



Q11: How satisfied are you with your decision to live in Downtown?

n = 530

LIVING SATISFACTION: SATISFACTION WITH PROPERTY/BUILDING



Q12: How satisfied are you with your current property/building choice?

n = 530

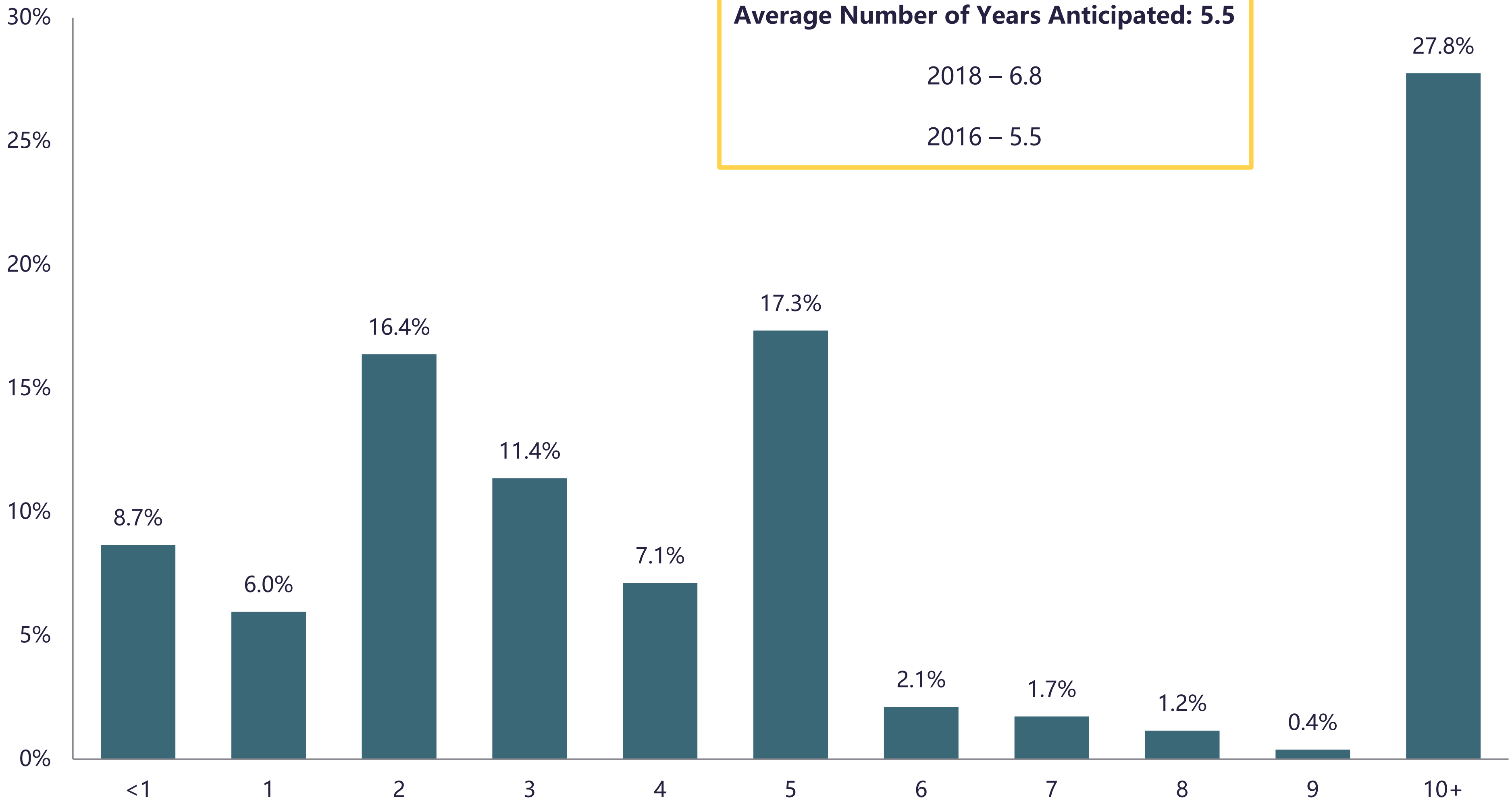
PITTSBURGH DOWNTOWN PARTNERSHIP

LIVING SATISFACTION: YEARS ANTCIPATED LIVING DOWNTOWN

Average Number of Years Anticipated: 5.5

2018 – 6.8

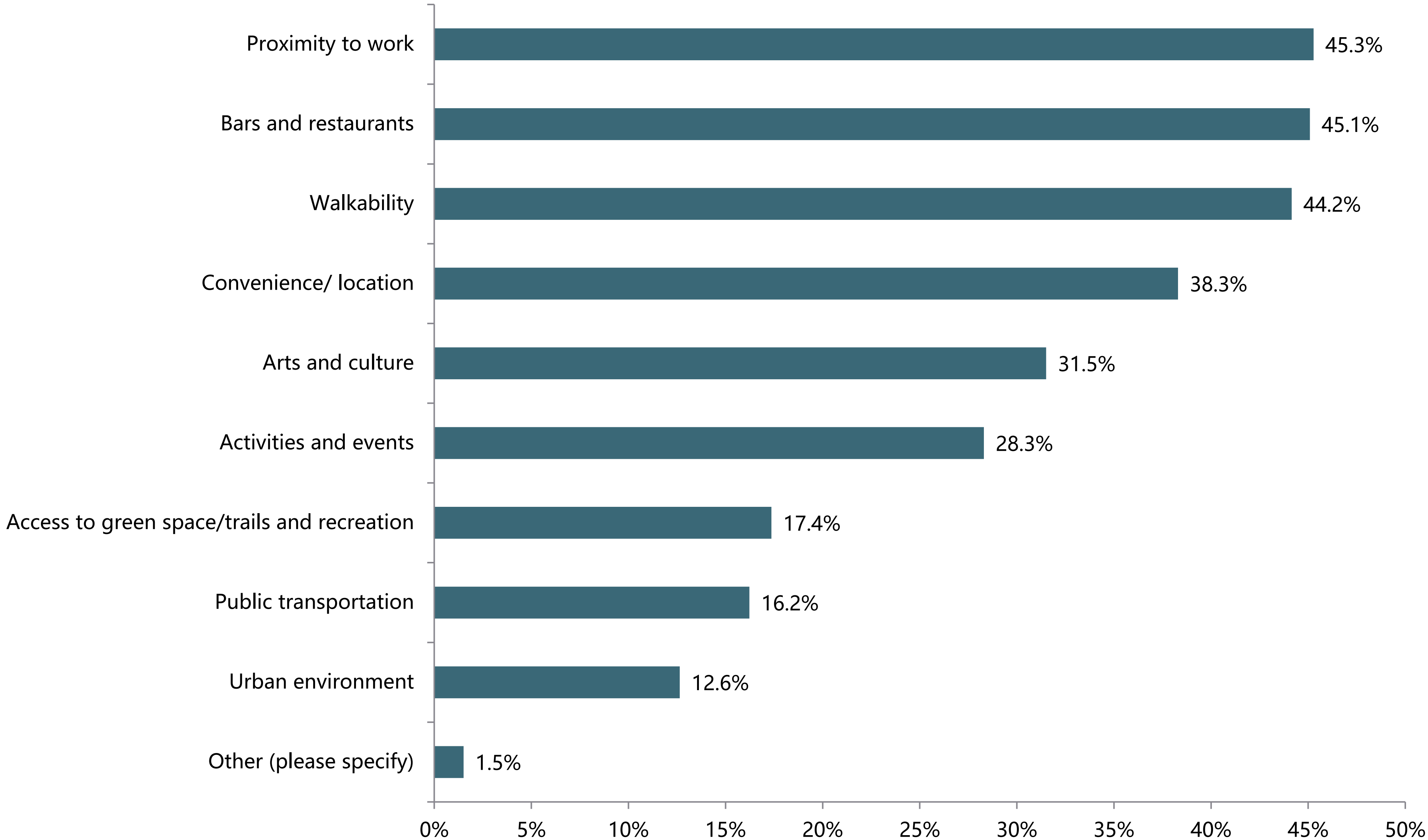
2016 – 5.5



Q4: For how long do you anticipate living in Downtown?

n = 519

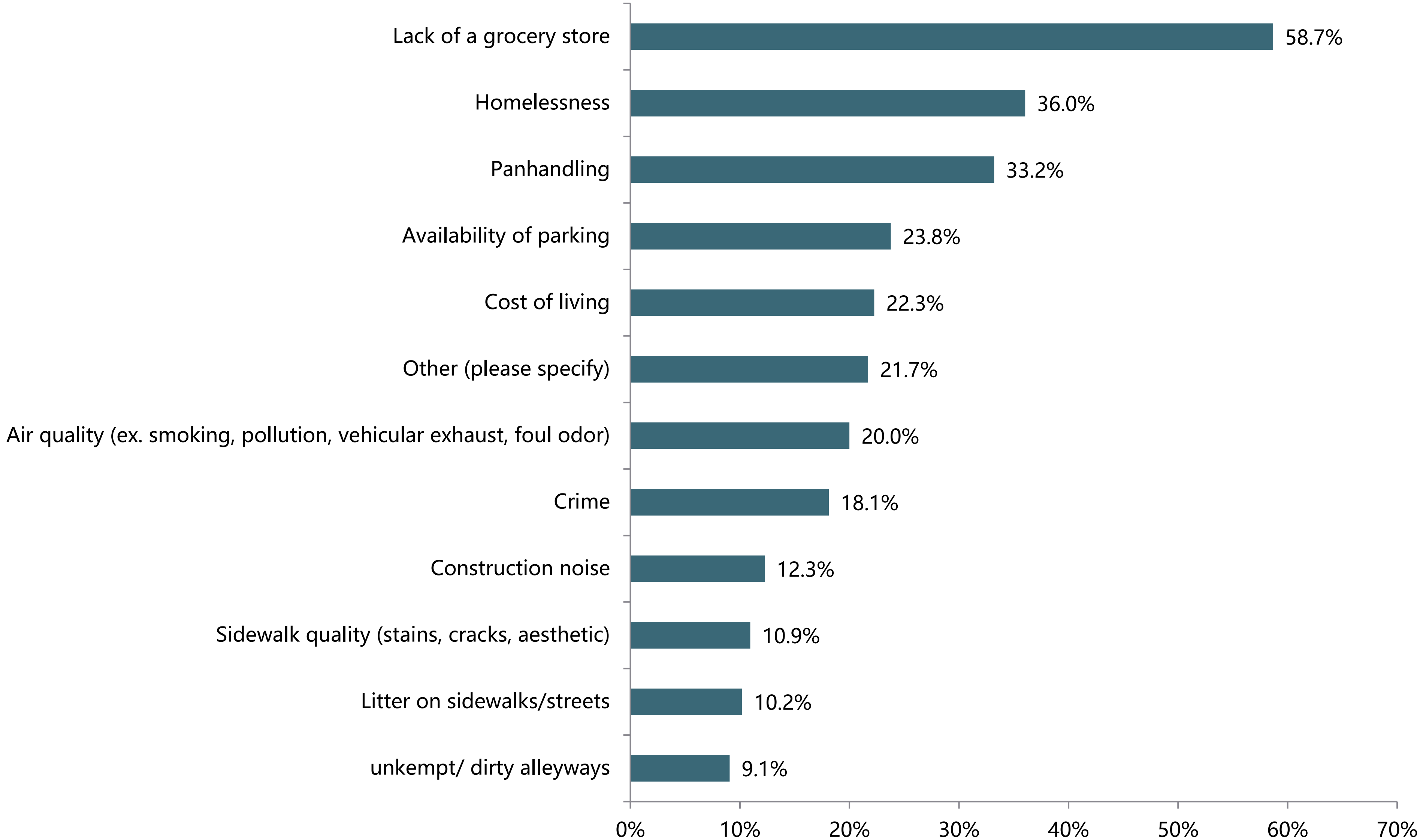
LIVING SATISFACTION: POSITIVE FACTORS OF DOWNTOWN LIVING



Q15: What aspects of Downtown living have the greatest POSITIVE impact on your quality of life as a Downtown resident? (choose up to three)

n =530

LIVING SATISFACTION: NEGATIVE FACTORS OF DOWNTOWN LIVING

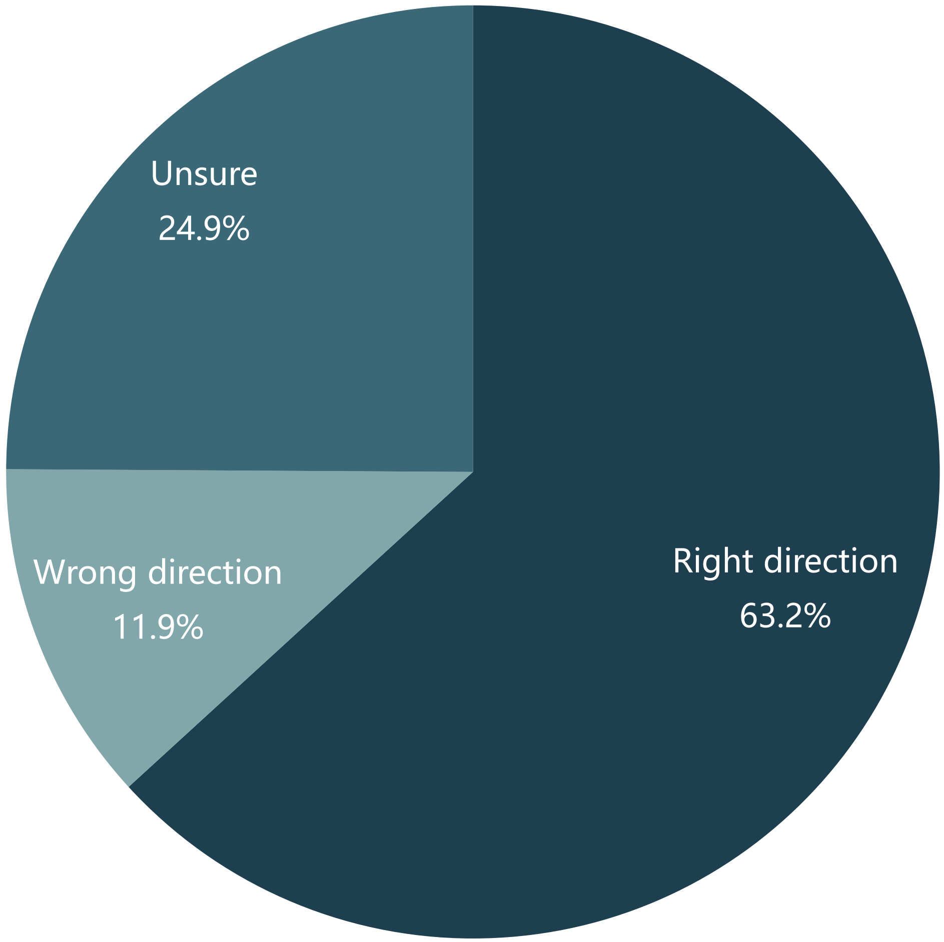


Q16: What aspects of Downtown living have the greatest NEGATIVE impact on your quality of life as a Downtown resident? (choose up to three)

n =530

PITTSBURGH DOWNTOWN PARTNERSHIP

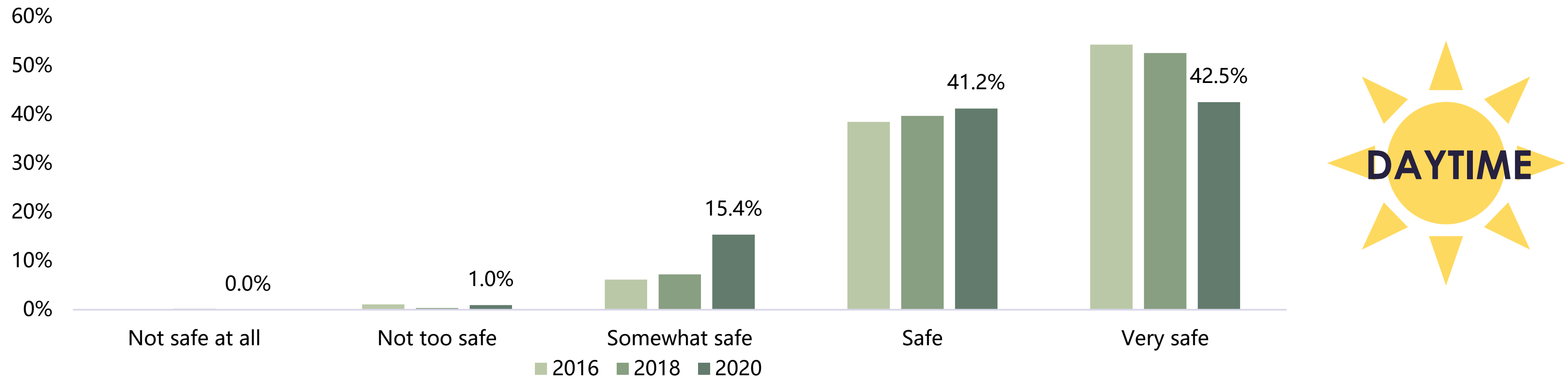
LIVING SATISFACTION: **DIRECTION OF DOWNTOWN**

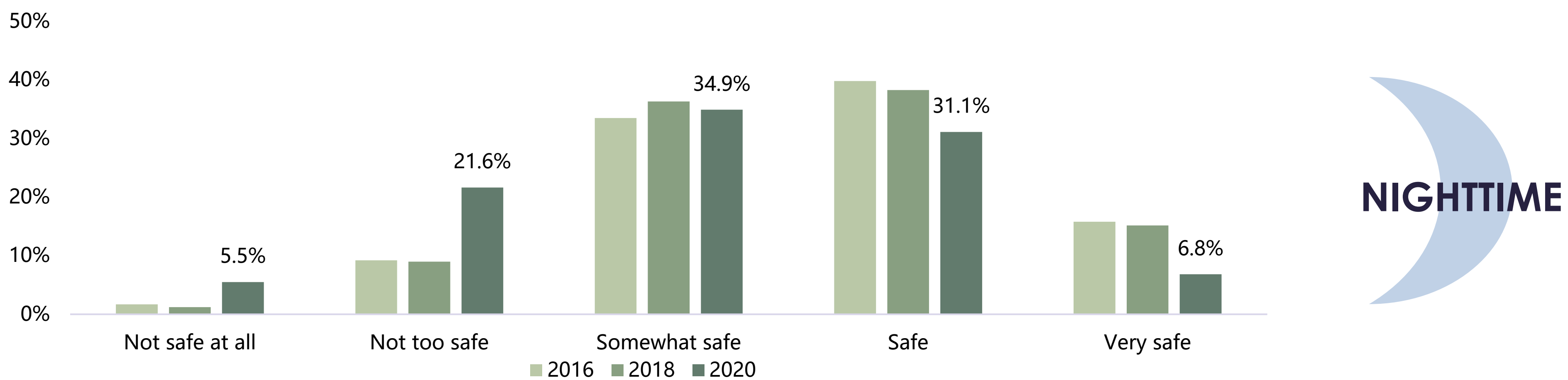


Q13: In general, do you feel Downtown is headed in the right direction or in the wrong direction?
n =530

SAFETY

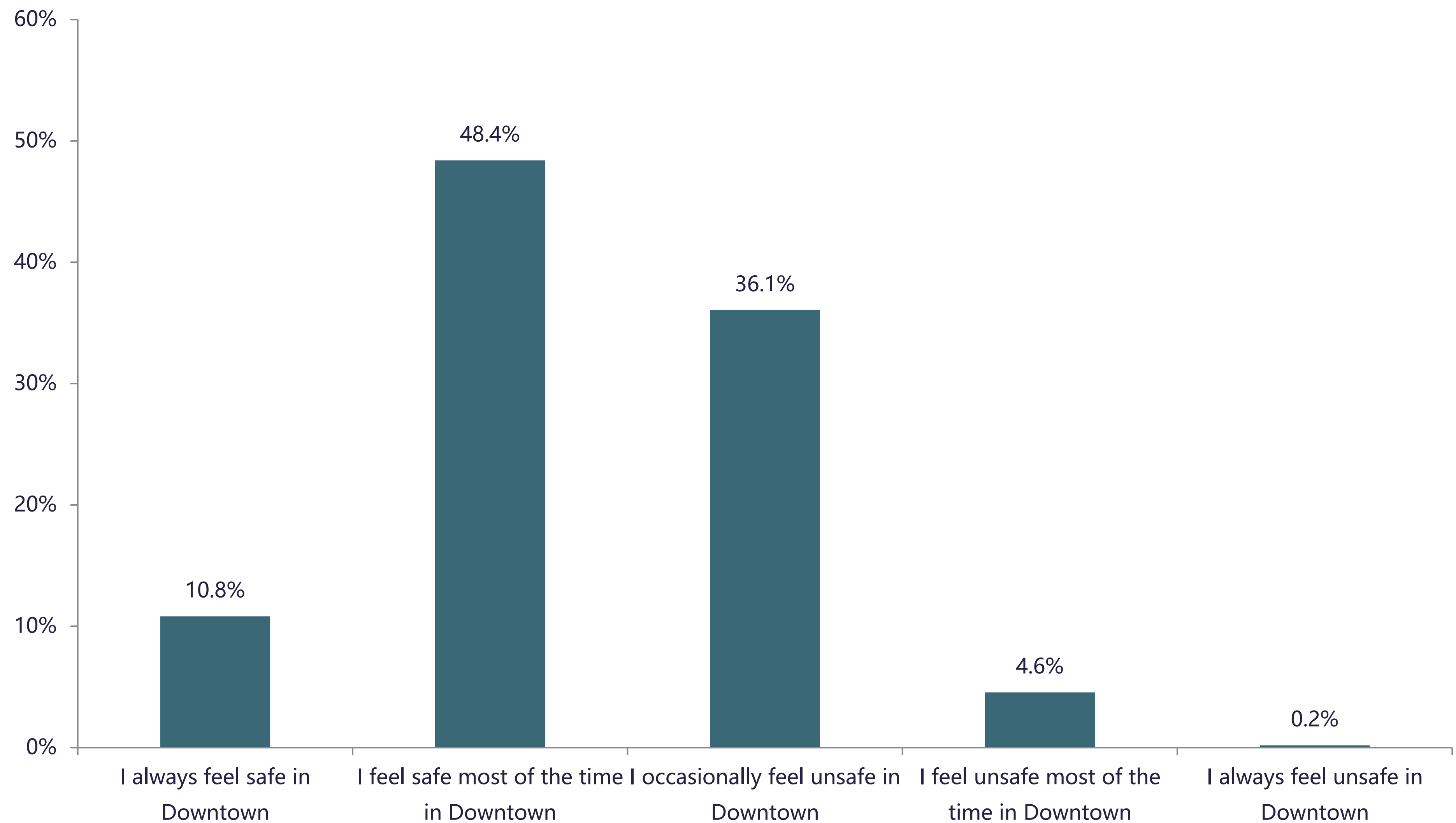
SAFETY: PERCEPTION OF SAFETY





Q17: How safe do you feel in Downtown during the day?
Q18: How safe do you feel in Downtown at night?
n = 527

SAFETY: OVERALL PERCEPTION OF SAFETY

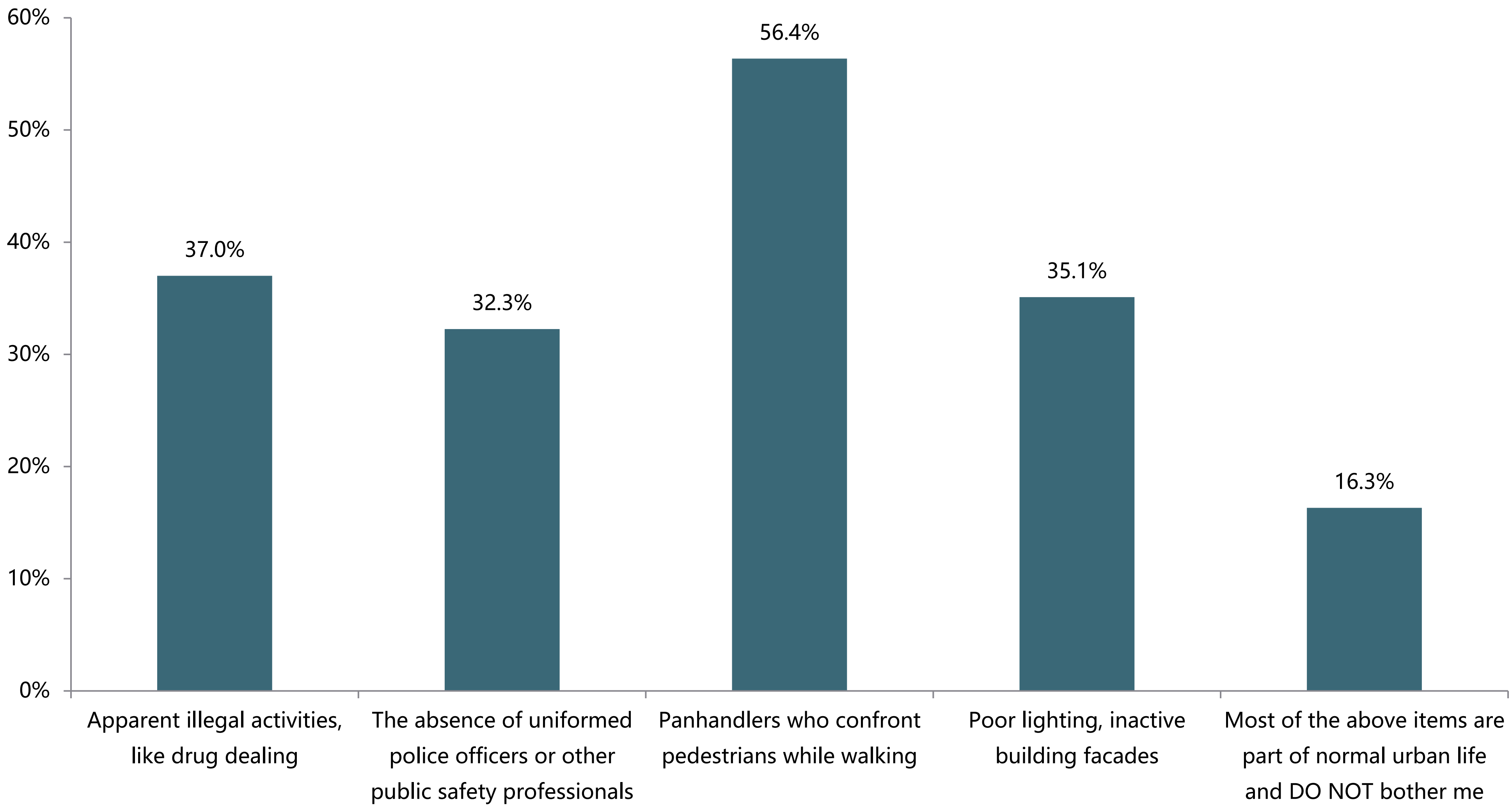


Q19: Please select the statement that most accurately describes your perception of safety in Downtown.

n = 527

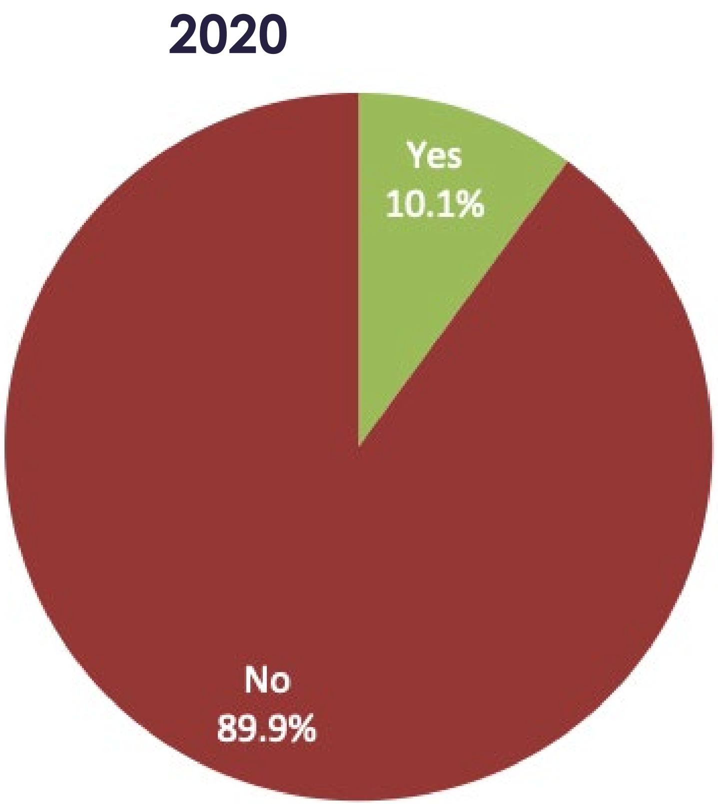
PITTSBURGH DOWNTOWN PARTNERSHIP

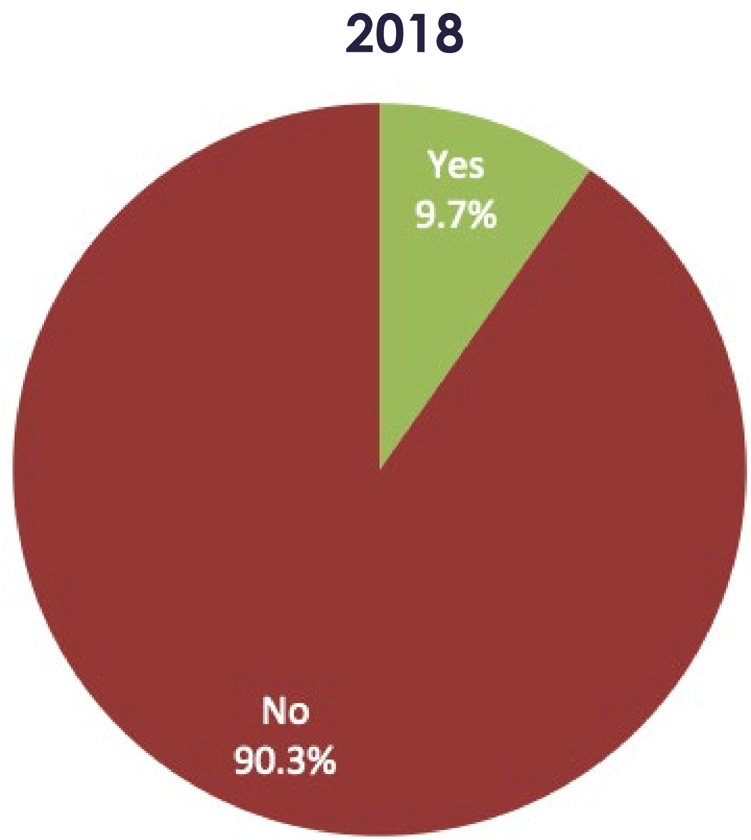
SAFETY: WHAT SITUATIONS/CONDITIONS MAKE RESDIENTS FEEL UNSAFE



Q20: What situations and/or conditions make you feel unsafe in Downtown?
n = 527

SAFETY: VICTIMS OF CRIME

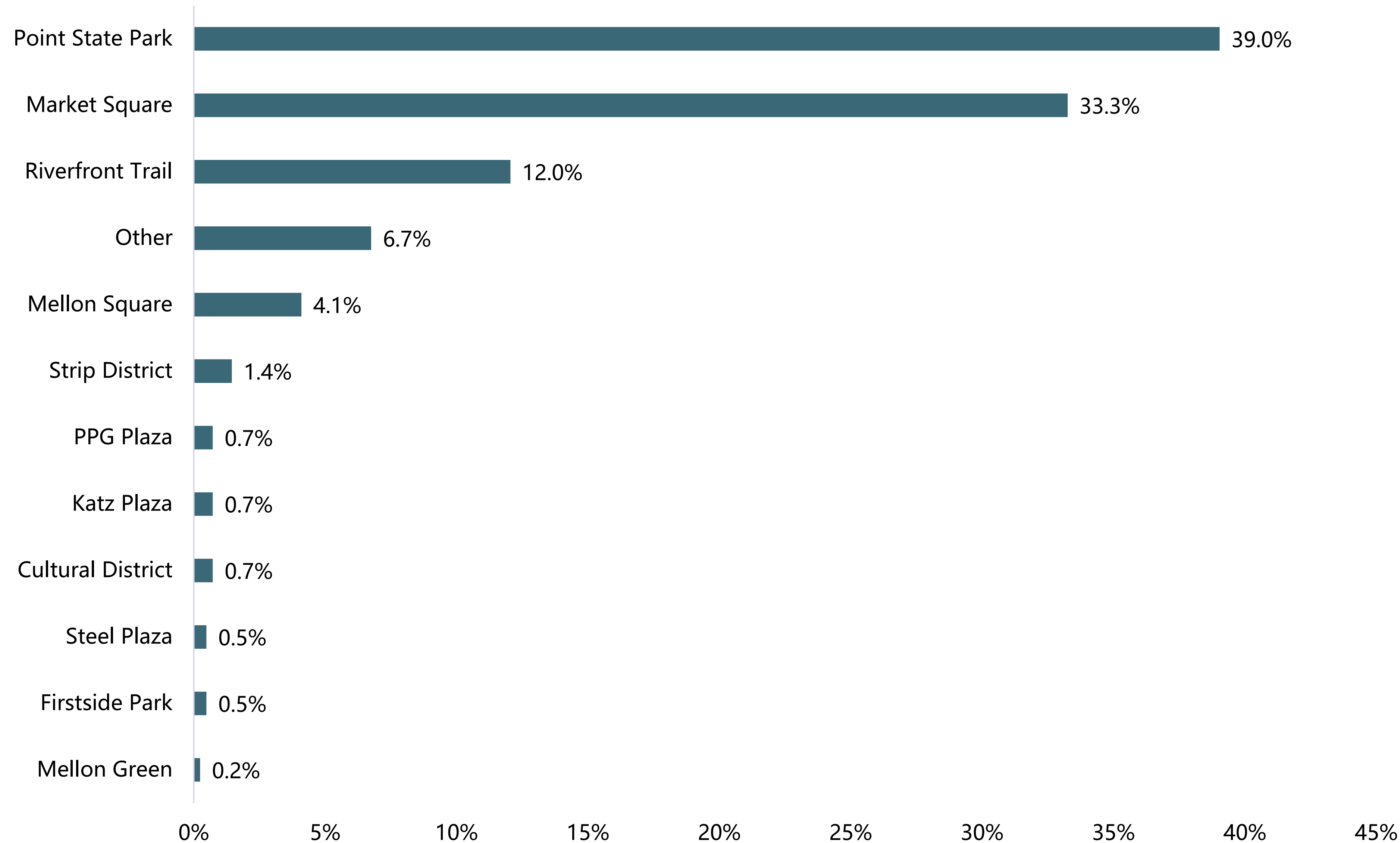




Q21: Have you or anyone in your household been the victim of crime in Downtown?
n = 527

PUBLIC SPACES

PUBLIC SPACES: FAVORITE PUBLIC SPACE

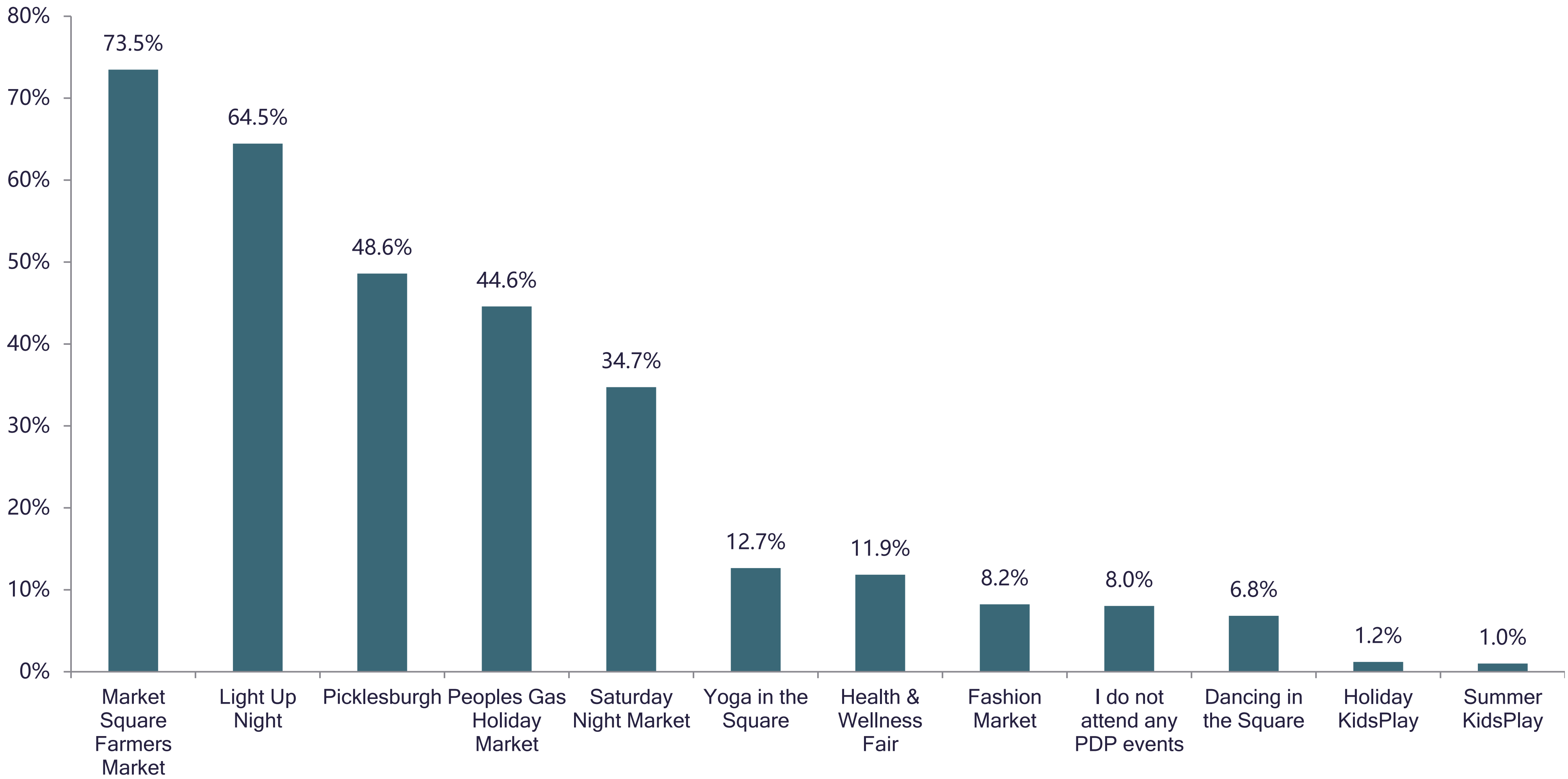


Q34: What is your favorite public space in Downtown and why?

n = 415

PITTSBURGH DOWNTOWN PARTNERSHIP

PUBLIC SPACES: ATTENDANCE AT PDP PROGRAMS AND EVENTS



Q35: Which of the following Pittsburgh Downtown Partnership events do you attend? Please select all that apply.

n = 498

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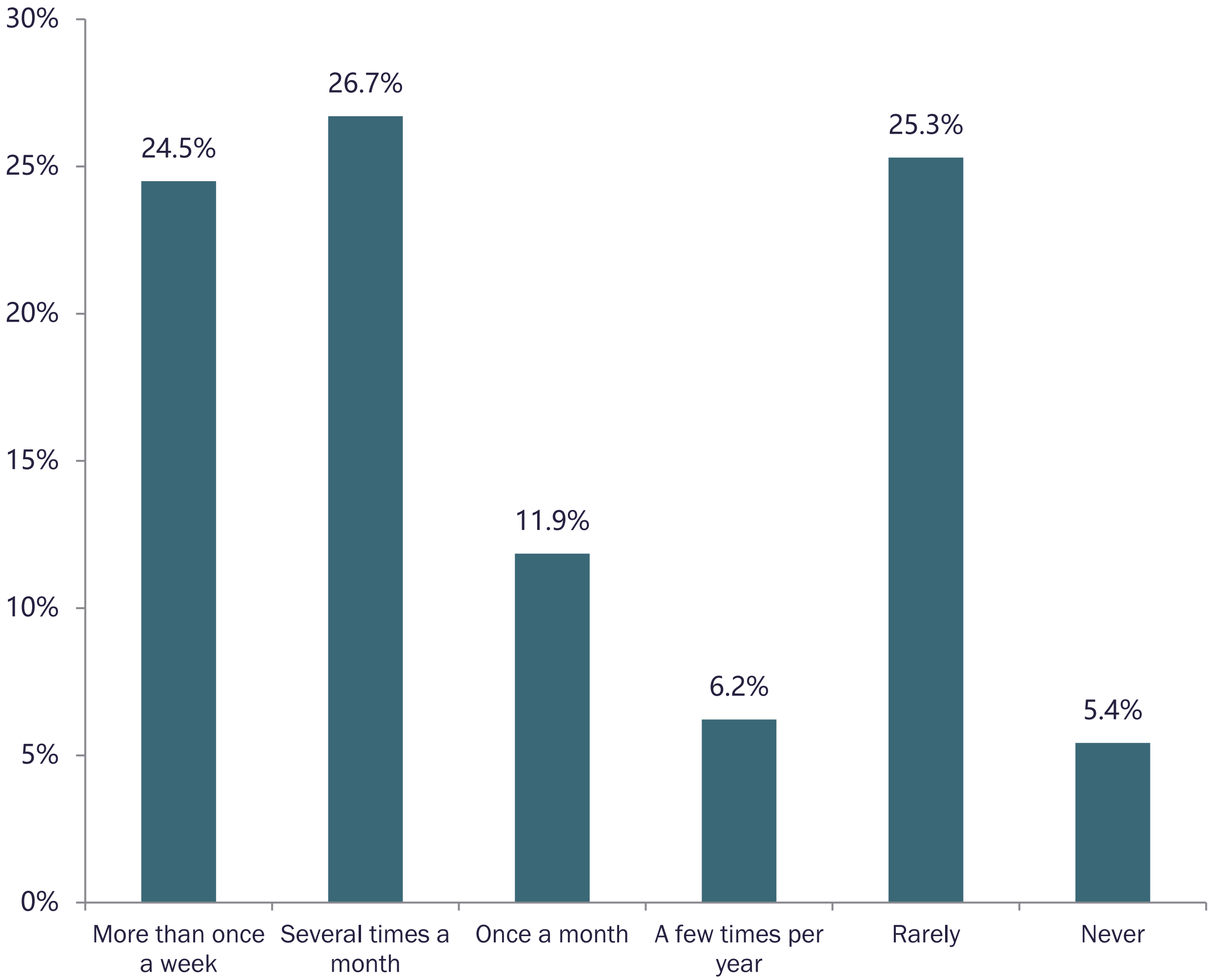
RETAIL

+

SPENDING

RETAIL AND SPENDING: FREQUENCY RESIDENTS SHOP DOWNTOWN

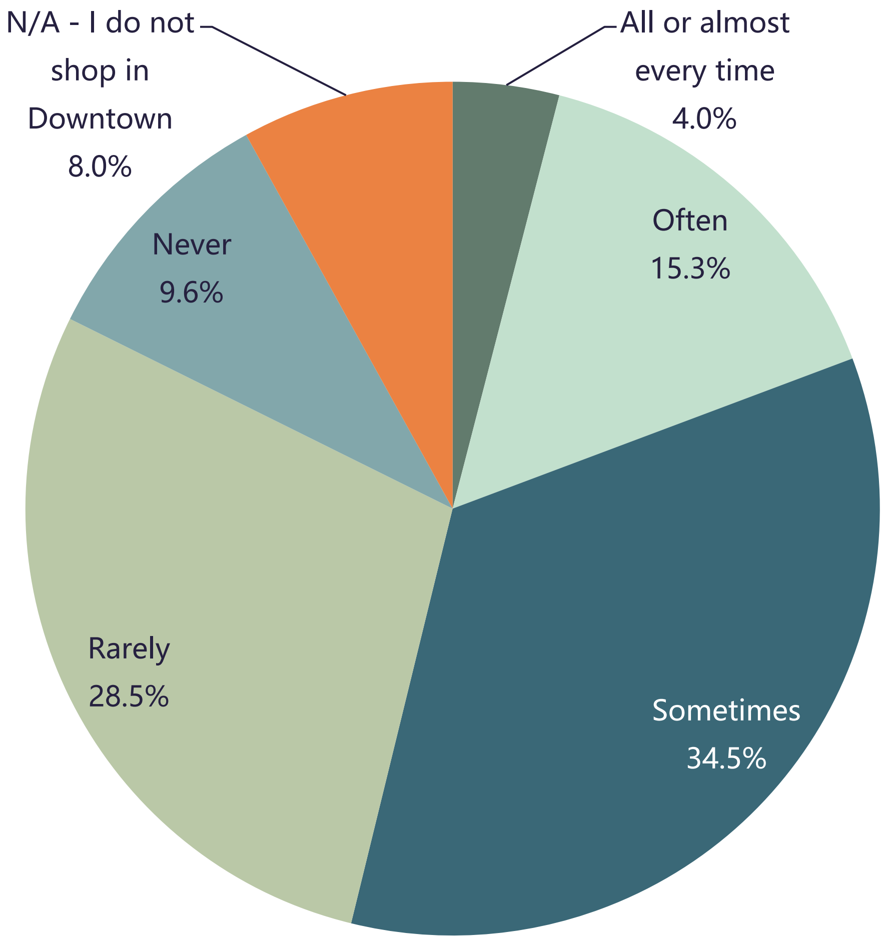


Reason For Not Shopping Downtown	Percent
Nothing is Here	76%
More Options Elsewhere	8%
Prefer Online Shopping	6%
Parking	2%
Options are too Expensive	2%
Other	5%

Q22: How often do you shop in Downtown? If you do not regularly shop in Downtown, please indicate the reason why.

n = 498

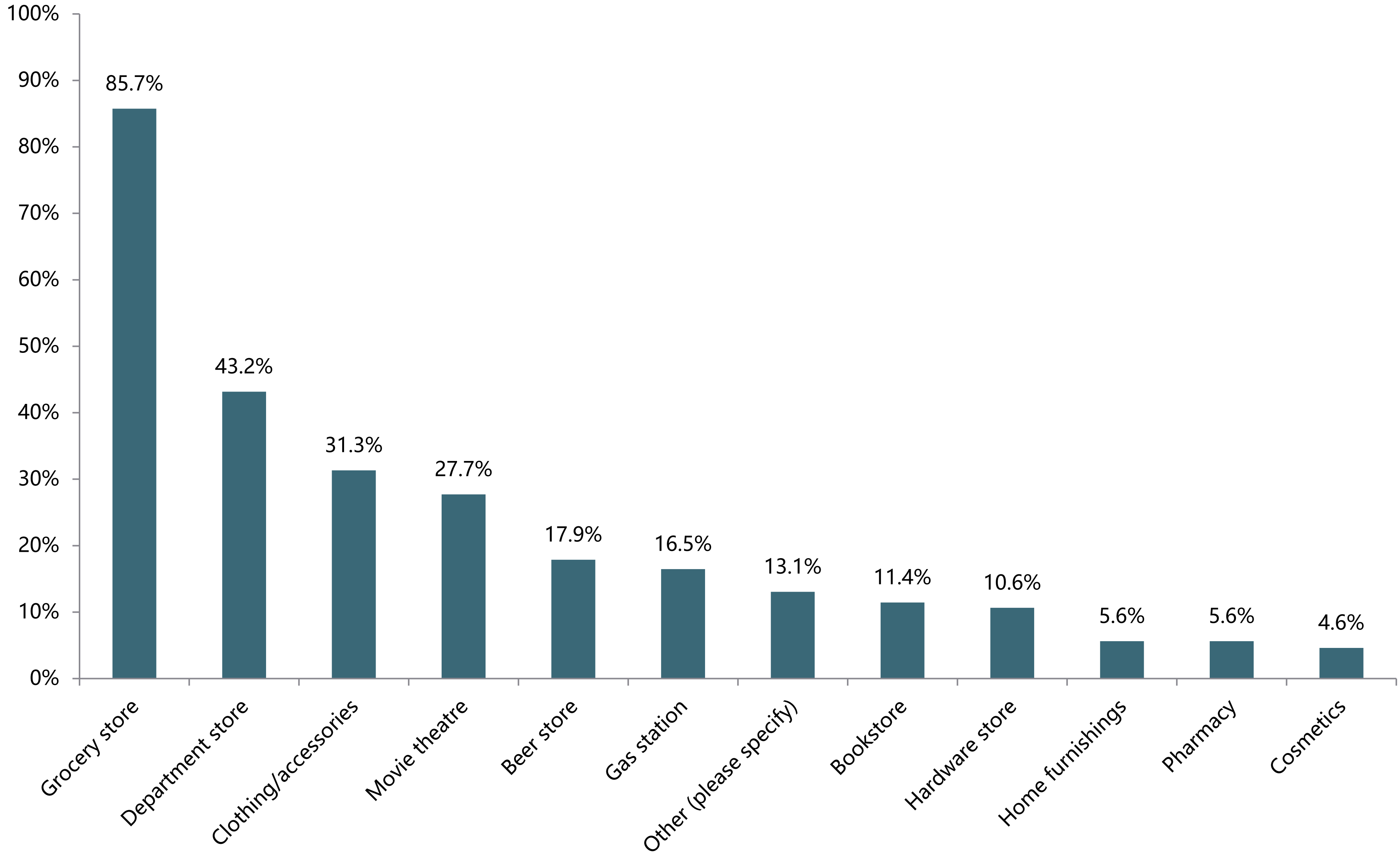
RETAIL AND SPENDING: ABILITY TO FIND WHAT RESIDENTS WANT TO PURCHASE DOWNTOWN



Type of Item	Percent
Grocery Items/Fresh Produce	76%
Clothing	11%
Household Items	6%
Other	7%

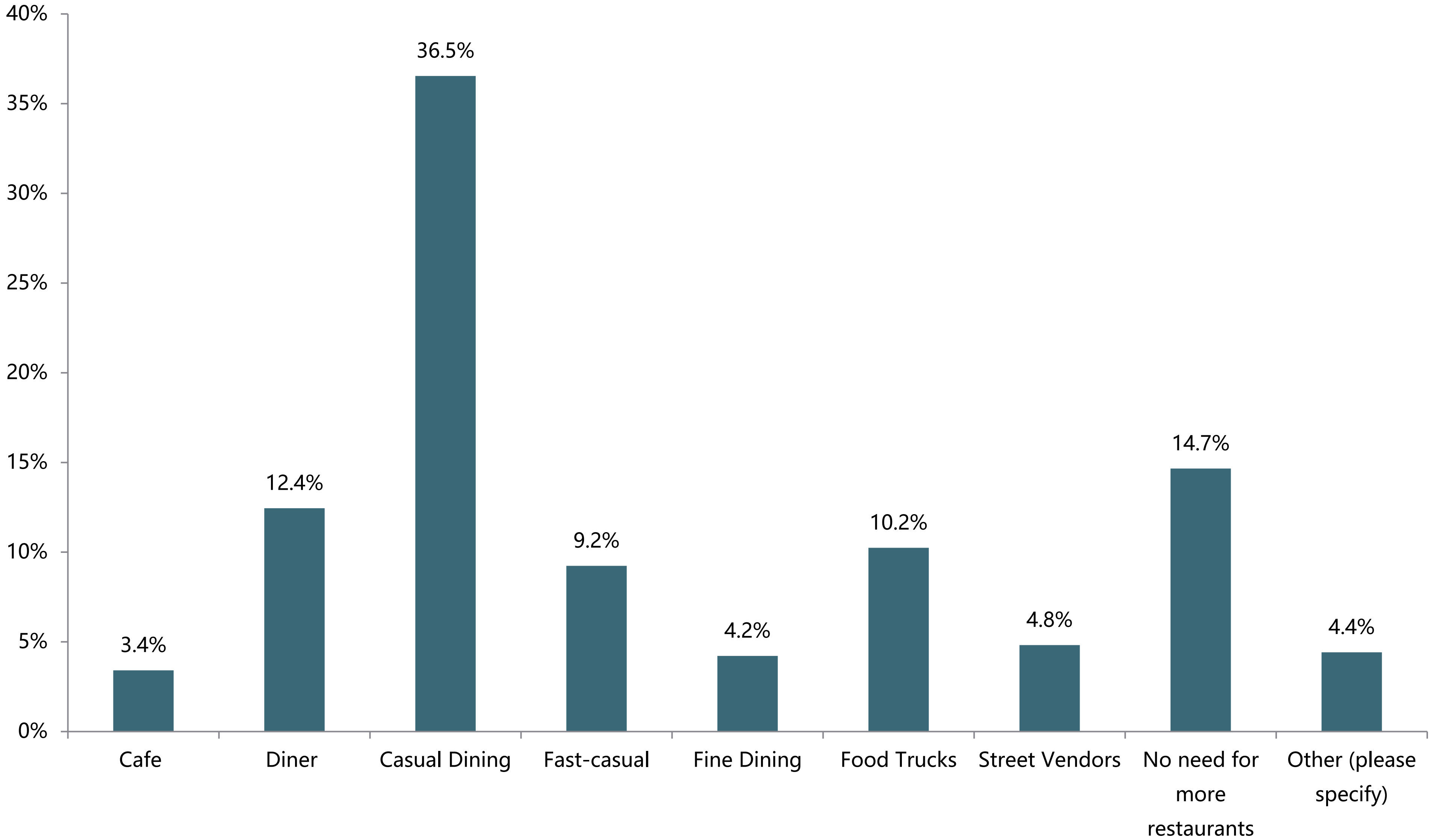
Q23: How often do you find everything that you are looking to purchase when you shop in Downtown? If there are items that you have difficulty finding to purchase in Downtown, please list them. n = 498

RETAIL AND SPENDING: **DESIRED DOWNTOWN RETAILERS**



Q23: What retail categories would you like to see more of in Downtown? (choose up to three)
n = 498

RETAIL AND SPENDING: DESIRED DOWNTOWN DINING TYPES



Q25: What type of restaurant would you like to see more of in Downtown? (choose one)
n = 498

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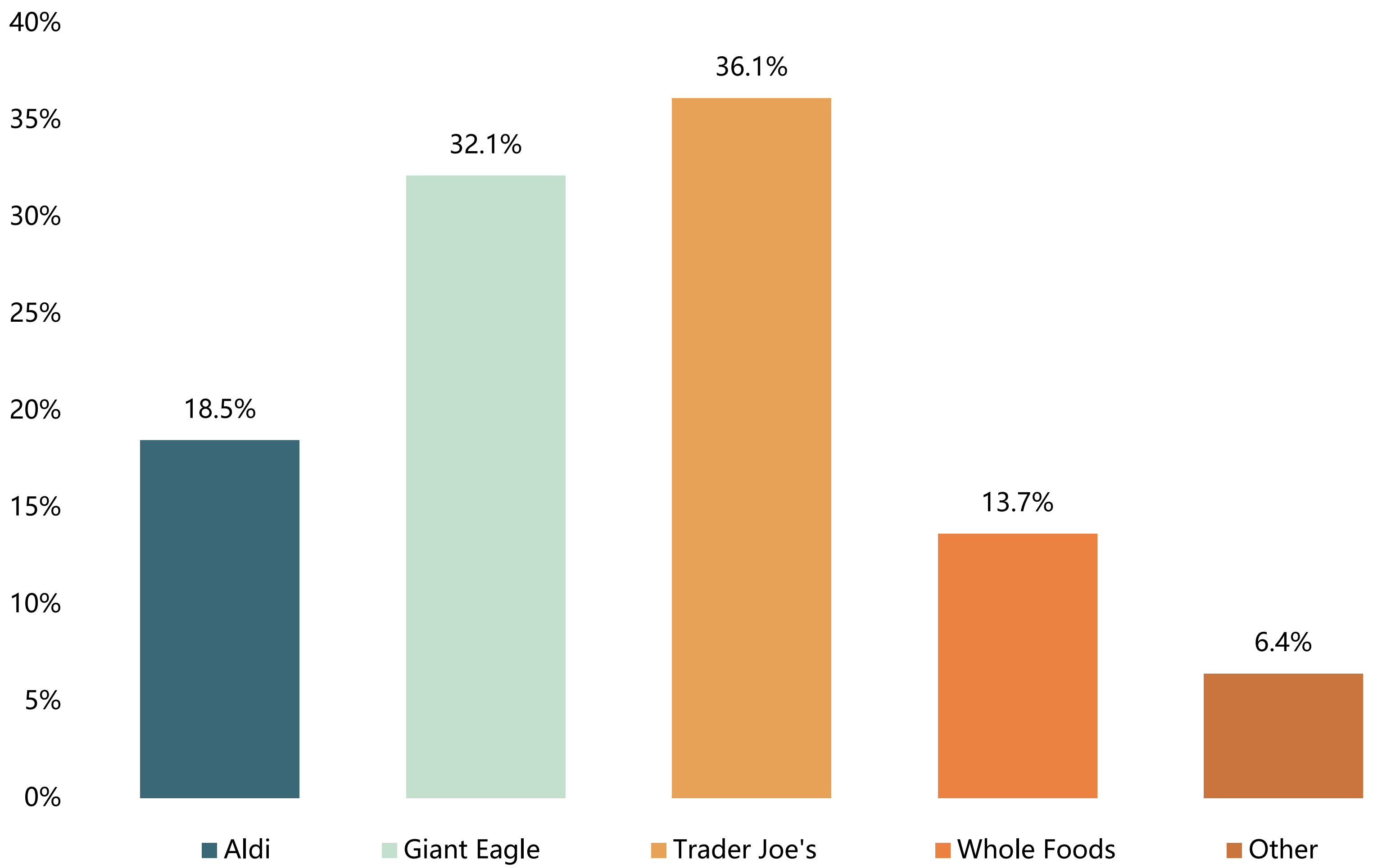
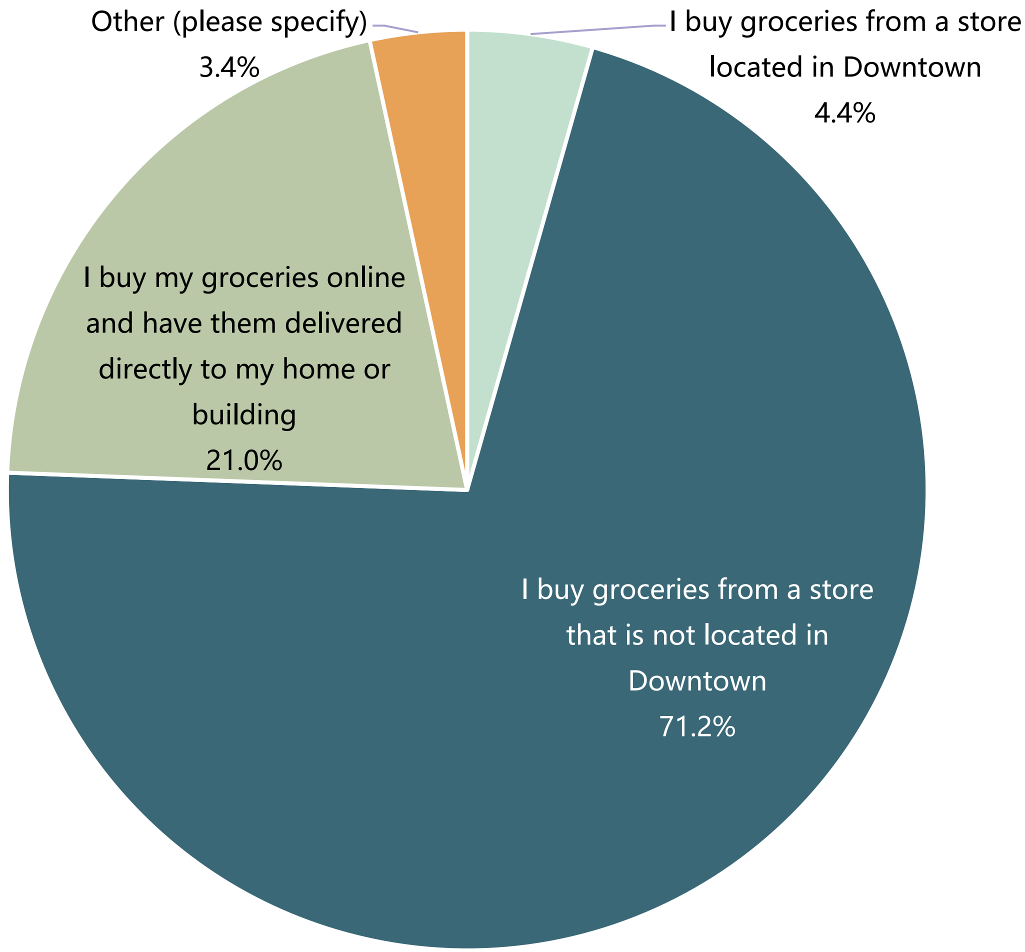
RETAIL AND SPENDING: DESIRED BRAND OF DOWNTOWN GROCERY STORE



Q26: Indicate which brand of grocery store you would be the most interested to have in Downtown.
n = 498

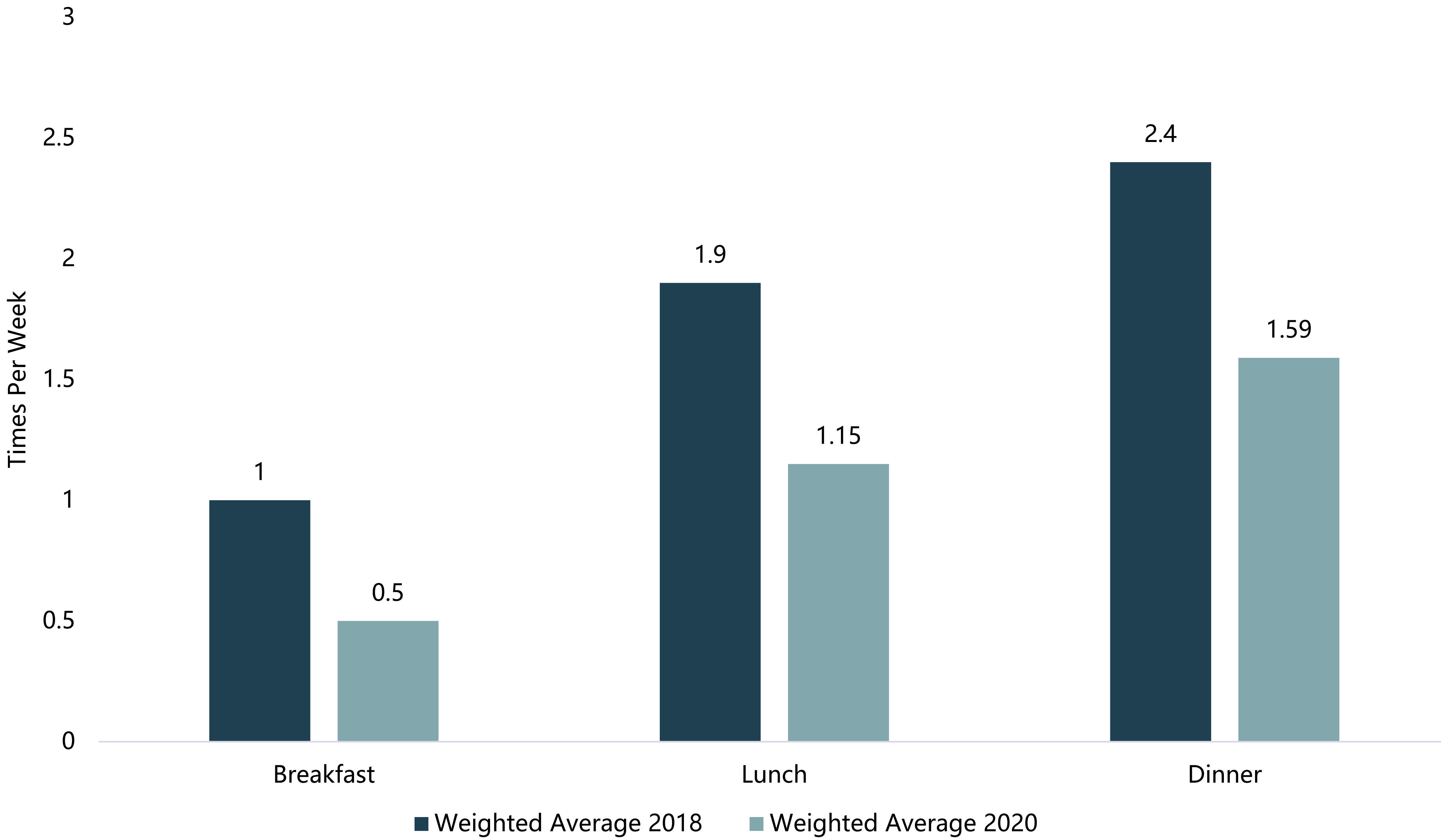
RETAIL AND SPENDING: PRIMARY WAY DOWNTOWN RESIDENTS BUY GROCERIES



Q29: What is the PRIMARY way that you buy groceries?

n = 498

RETAIL AND SPENDING: **FREQUENCY OF DINING OUT PER WEEK**



Q30: How often do you order food or dine out in Downtown restaurants? (both formal and casual dining)

n = 498

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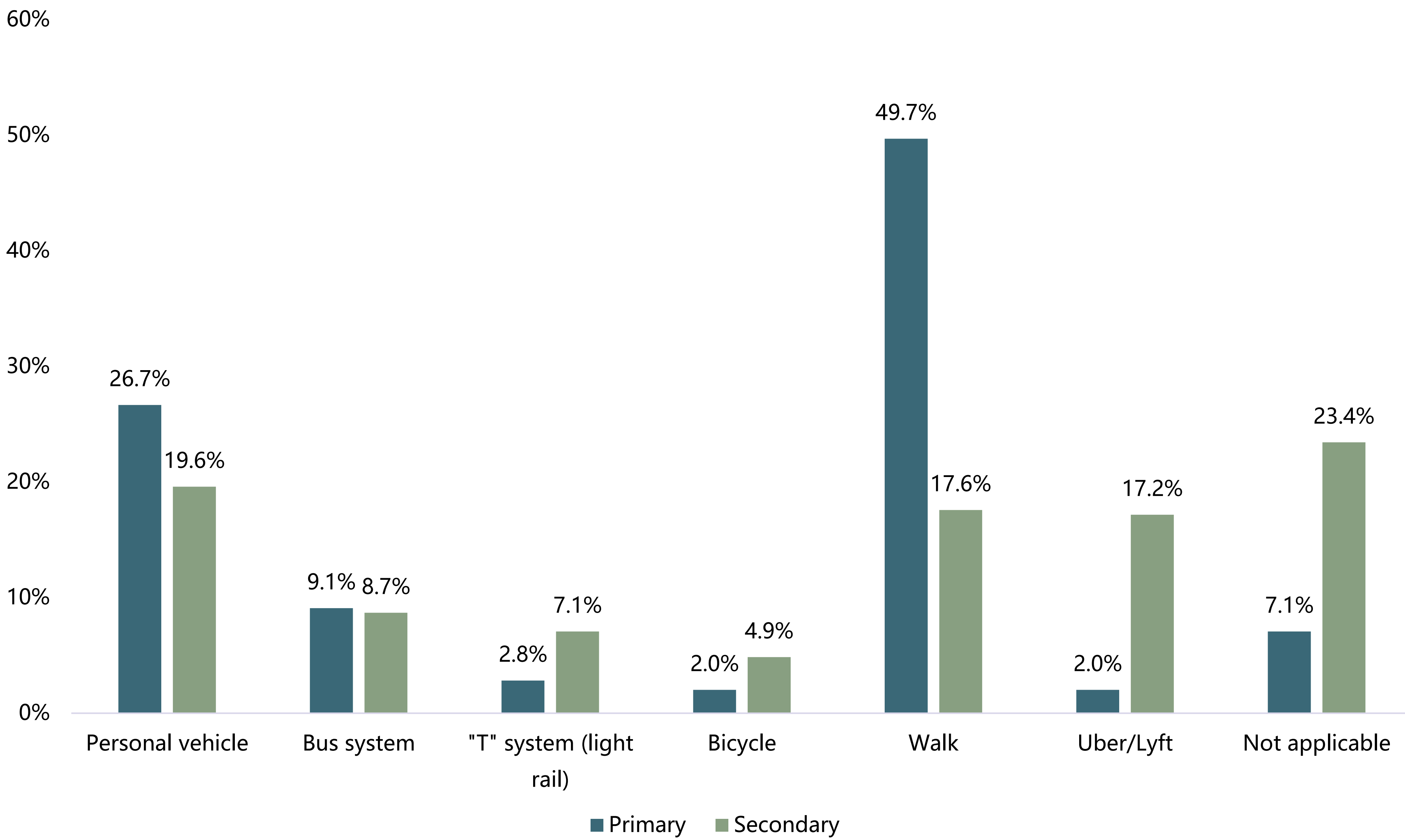
RETAIL AND SPENDING: AVERAGE MONTHLY SPENDING

Average Monthly Spending		
	2020	**2018**
Food & Beverage (coffee, bakery, restaurants, bars, etc.)	$301.30	$300.52
Services (dry cleaner/laundromat, hair salons, health club/spa, etc.)	$55.99	$181.26
Entertainment (theater, plays, live music, etc.)	$72.95	$89.64
Sporting Events (baseball, hockey, football, soccer, etc.)	$65.28	$81.41
Retailers (department stores, shoes/clothing/accessories, etc.)	$48.60	$42.55
Total	**$544.12**	**$695.38**

Q31: In a typical month, how much money do you spend at the following Downtown establishments and events? (enter whole numbers only)
n = 498

TRANSPORTATION

TRANSPORTATION: MODES OF TRANSPORTATION TO WORK



Q39: What is your PRIMARY mode of transportation that you use to commute to work/school?
Q40: What is your SECONDARY mode of transportation that you use to commute to work/school?
n = 495

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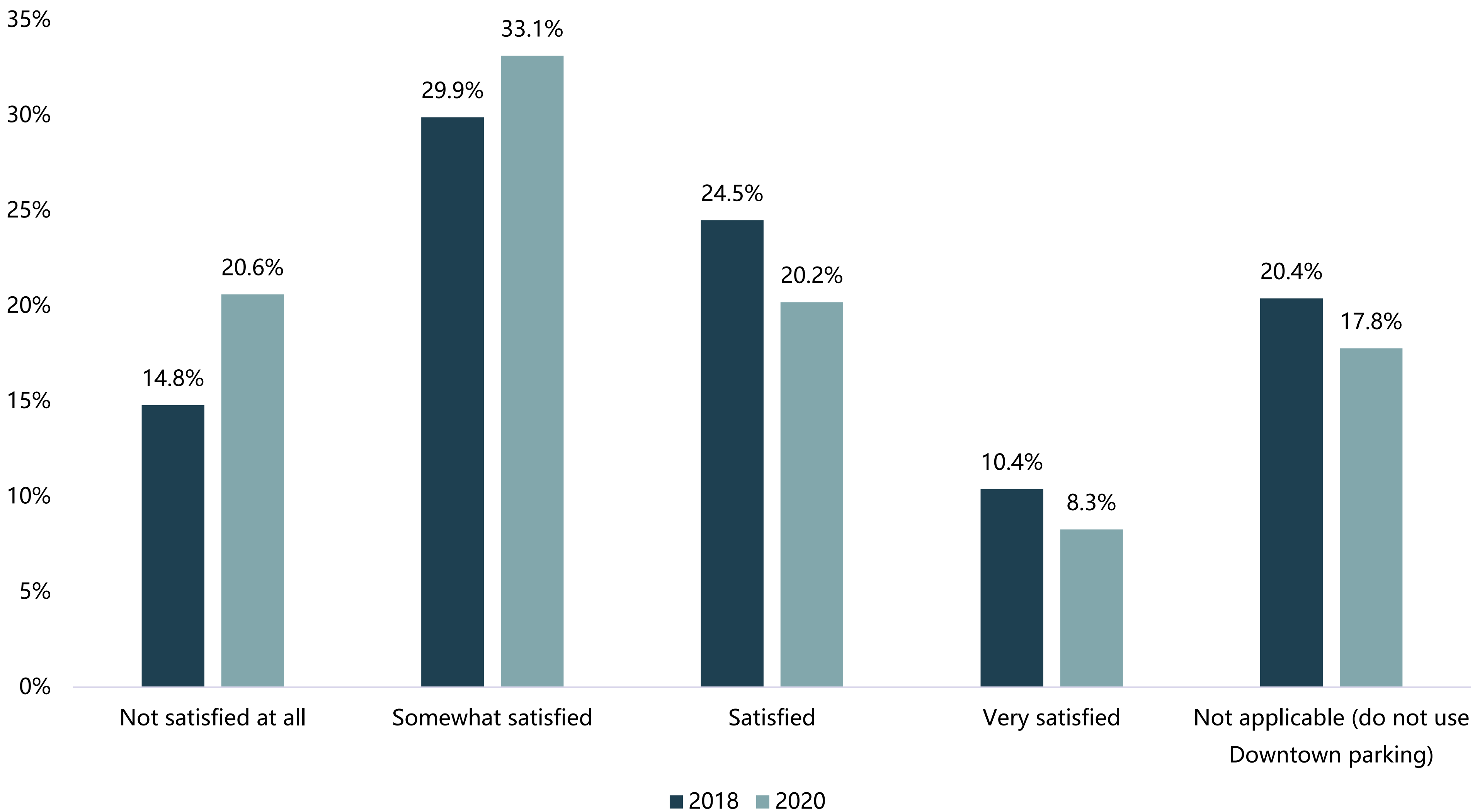
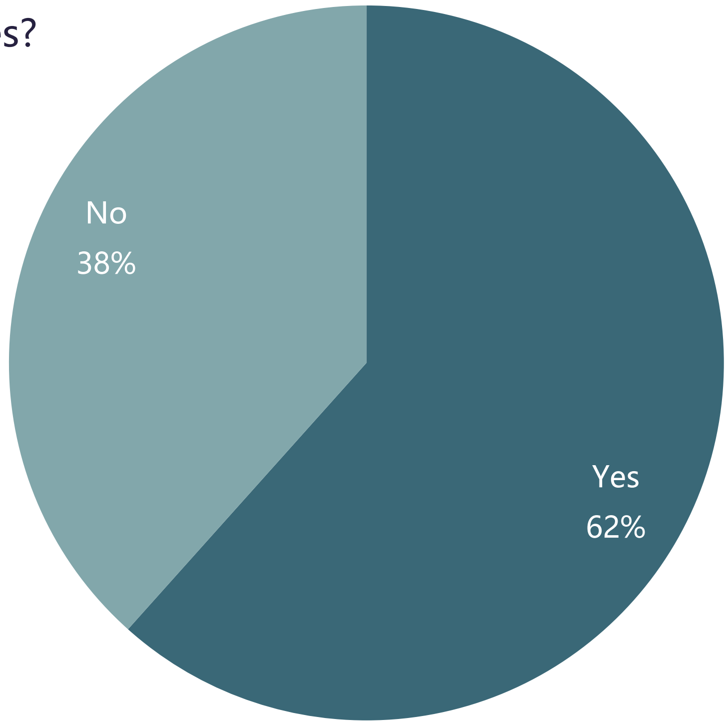
TRANSPORTATION: SATISFACTION OF PARKING DOWNTOWN



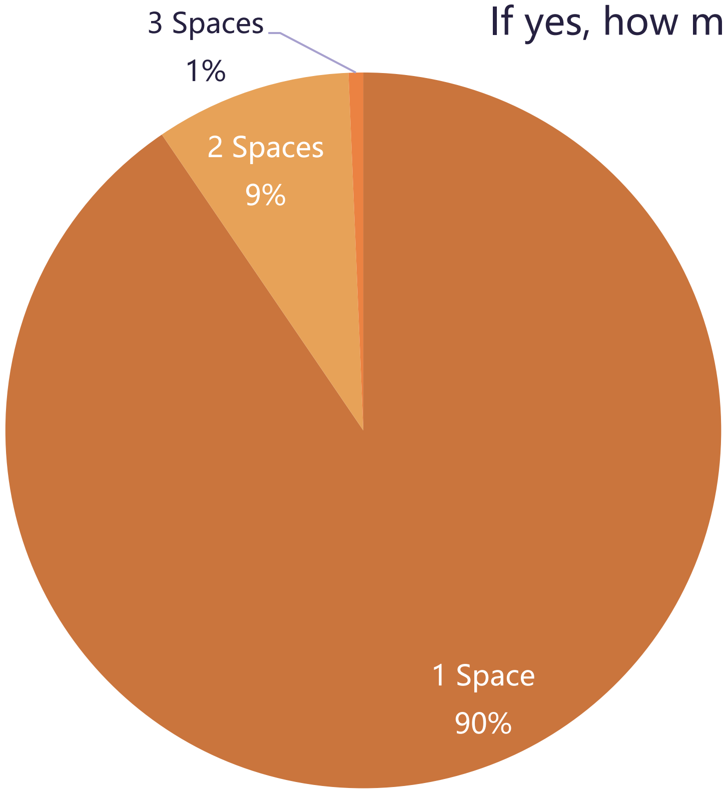
Q41: How satisfied are you with your ability to park and the availability of parking Downtown?
n = 495

TRANSPORTATION: **PARKING SPACES**

Do you currently lease one or more parking spaces?



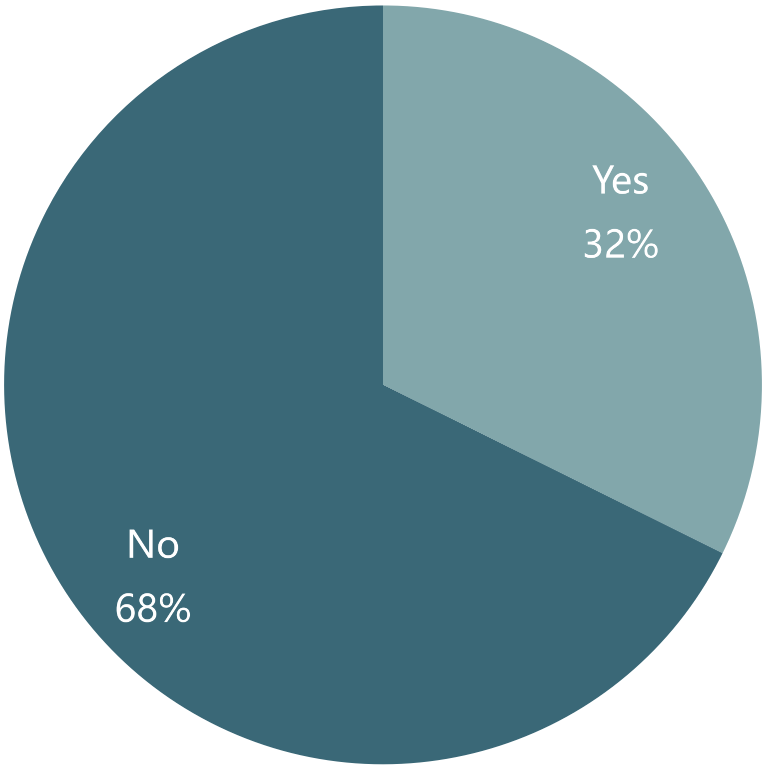
If yes, how many spaces?



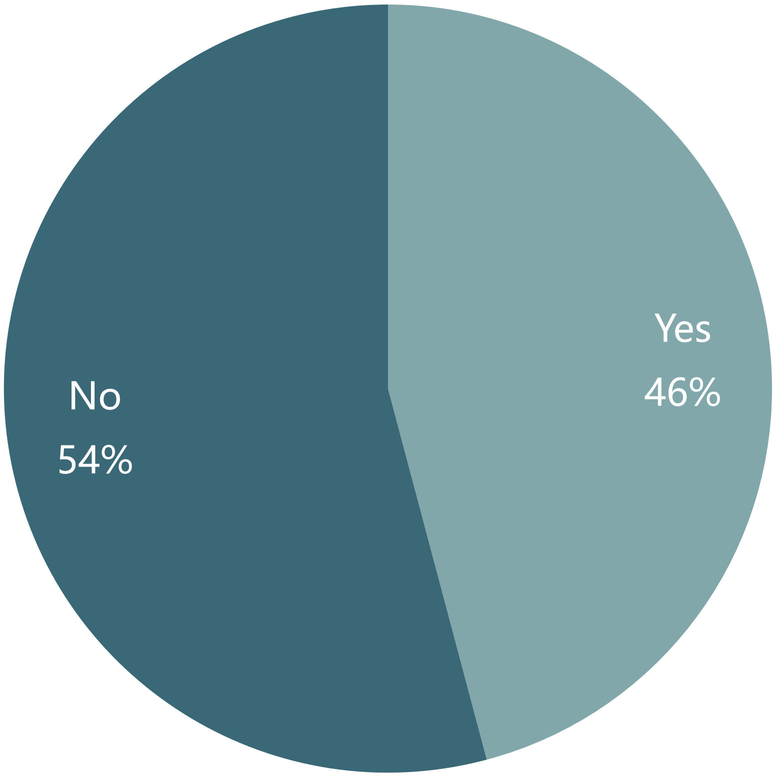
Q42: Do you currently lease one or more parking spaces? n = 495
Q43: If YES, how many spaces do you lease? n = 325

TRANSPORTATION: **BIKE LANES**

Do you use bike lanes Downtown?



Should bike lanes be expanded Downtown?



Q44: do you use the protected bike lanes Downtown?
Q43: Would you like to see the bike lane network expanded throughout Downtown?
n = 495

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