

STRIP DISTRICT

— NEIGHBORS —
Pittsburgh, Pennsylvania
EST. 1999

► 2021



State of **THE STRIP DISTRICT**

Produced by



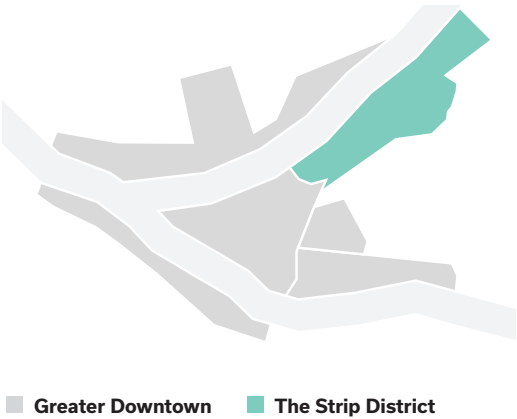
PITTSBURGH
DOWNTOWN
PARTNERSHIP

PGH 2021



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Strip District Neighbors are pleased to introduce the inaugural issue of the 2021 State of the Strip District Report. Through this timely report, you will find our historic community is in a period of transition. Consider these stats: Between 2011 and 2021, a whopping \$1.4B has been invested in the neighborhood, with another \$98M announced. The residential population here has more than doubled since 2015, representing a 150% increase within five years. We believe that these increased long term investments through home ownership are key to the continued growth and stabilization of our community.

Just as “The Strip” has welcomed thousands of new residents in recent years, we have also attracted some of the most innovative tech companies in the country. Honeywell Robotics, Facebook’s Artificial Intelligence Team, Aurora Innovation (which purchased Uber’s self-driving car division), Argo AI, Bombardier, Smith + Nephew, and dozens of other tech companies all call the Strip District home—and with good reason.

The Strip District remains an ethnically diverse, pedestrian-friendly, and ideally situated place to visit, work, and live. It continues to blend retail and wholesale businesses, tech giants and start-ups with recreational experiences and urban residences.

Despite the COVID-19 pandemic, new construction projects are continuing, as evidenced by the more than 200,000 SF of new office space that delivered in 2020 and the active construction sites delivering additional space in 2021–2022. And, after seven years in the works, a \$62.6M historic rehab of the 1,533-foot-long Strip District Terminal was completed in 2020.

While there was a slight softening in the residential market due to the pandemic, the neighborhood remains resilient. The historic Penn Avenue shopping district saw a 40% decline in visitor traffic in 2020 compared to 2019 levels, but visitor activity has picked up considerably as a result of COVID-19 vaccinations and the relaxation of previously mandated occupancy restrictions on businesses.

We owe a special thanks to our neighbors at the Pittsburgh Downtown Partnership who developed this report in partnership with the Strip District Neighbor’s leadership team. The success of the Strip will always be linked to Downtown and we look forward to future collaborations. As the Strip District continues to evolve, we remain dedicated to preserving the uniqueness and special flavor that truly makes it a regional treasure and a one-of-a-kind neighborhood.

Sincerely,

Pamela Austin
President and Board Chair
Strip District Neighbors

The State of the Strip District is produced by the Pittsburgh Downtown Partnership. The data presented in the report is derived from numerous sources and showcases activity within the boundaries of Greater Downtown. For the full 2021 State of Downtown Pittsburgh Report visit DowntownPittsburgh.com/SODP

BY THE NUMBERS

OFFICE & EMPLOYMENT



- **8,870** workers
- **2.4M SF** of rentable office space
- **1.5M SF** of office space in the pipeline
- Fringe Class A average asking rate: **\$28.24 per SF** (1Q 2021, CBRE)*
- Fringe Class B average asking rate: **\$23.55 per SF** (1Q 2021, CBRE)*

*The Pittsburgh Fringe office submarket captures several urban neighborhoods within the City of Pittsburgh including Lawrenceville, North Side, South Side, Station Square, Strip District, and Uptown.

HOUSING & POPULATION



- **1,920** residents
- **150%** increase in residents since 2015
- **1,425** residential units
- **1,258** residential units in the pipeline
- Average rents:
 - Studio: **\$1,511**
 - One-bedroom: **\$1,815**
 - Two-bedroom: **\$2,481**
- **\$484,900** median list price of a home

RETAIL & HOSPITALITY



- **91%** of restaurants and retailers are locally owned
- **2.8M** annual visitors to the Penn Avenue Business District (pre-pandemic)
- **11** new businesses (2020–2021)
- **7** business closings (2020–2021)
- **427** hotel rooms
- **140** hotel rooms in the pipeline

TRANSPORTATION



- **5** Port Authority bus routes carry **5 million** people a year through the Strip District
- **1,880** public parking spaces
- **3,580** parking spaces in the pipeline
- **\$12.60** average daily parking rate
- **\$172** average monthly parking rate
- Walk Score: **74** most errands can be accomplished by foot
- Transit Score: **60** many convenient public transportation options
- Bike Score: **82** biking convenient for most trips



Image: 75 Hopper Place Rendering

OFFICE & EMPLOYMENT

OFFICE MARKET

Stay-at-home orders were in effect for the majority of 2020 due to the COVID-19 pandemic. Throughout 2020, leasing and sales activity slowed in the Strip District as many employees transitioned to remote work. It is likely that employers will continue to utilize a hybrid work-from-home strategy throughout 2021 and potentially longer. With tenants and employees seeking higher quality of well-being and work environments, there is opportunity for new and existing office buildings to optimize indoor health and safety through the implementation of advanced building technologies.

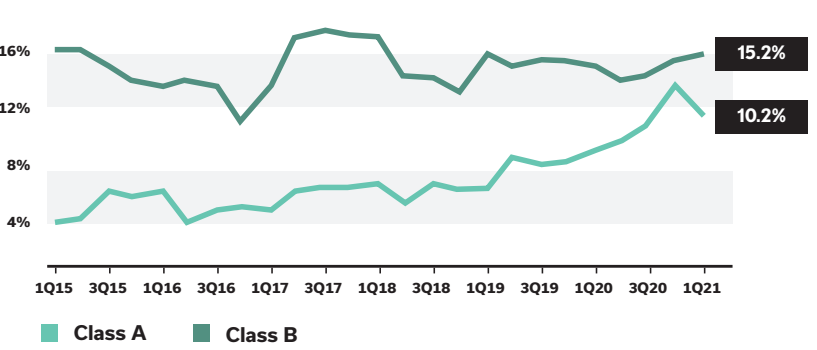
Despite the pause in the market onset by the pandemic, over 200,000 SF of new office space was delivered in the Strip District. The Stacks at 3 Crossings 110,860 SF (buildings D & E) where Smith + Nephew leased 67,000 SF of the development, 3000 Smallman Street (23,790 SF), and the Auction House at the Strip District Terminal (36,290 SF).

8,869

TOTAL JOBS IN THE
STRIP DISTRICT

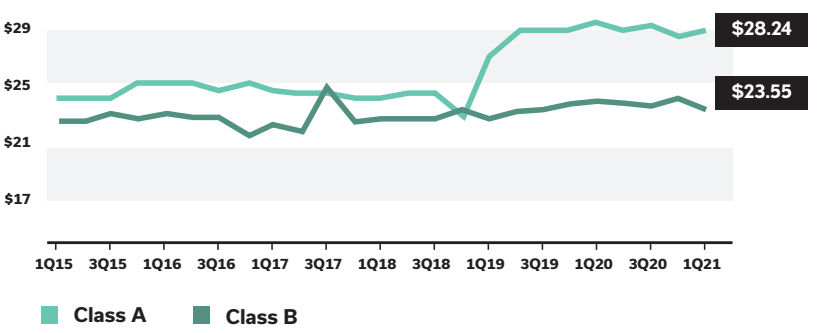
Source: OnTheMap—Local Employment Dynamics Partnership,
U.S. Census Bureau (2018)

Downtown Fringe Class A & B Vacancy Rates



Source: CBRE

Downtown Fringe Class A & B Rental Rates Per SF



Source: CBRE



The Vision on Fifteenth is being developed by Burns Scalo Development LLC. Once completed, the project will consist of 230,000 SF of office space, 5,400 SF of retail, and 23,000 SF of flex space.

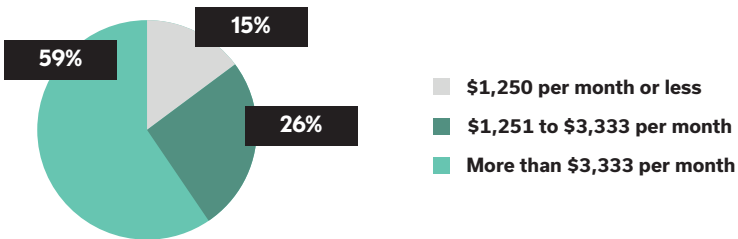
The Strip District has two speculative office projects underway that broke ground in Q3 2020, 75 Hopper Place (145,867 SF) and the Vision on Fifteenth (265,000 SF), demonstrating a high level of developer confidence in the market. 1600 Smallman (110,000 SF) is expected to complete in 2021 and will be fully leased by autonomous vehicle firm Aurora Innovation. These new projects are designed with enhanced building systems that allow for increased air circulation and a host of other safety measures to attract quality tenants. Factory 26, a renovation of a former 54,000 SF warehouse, is also under construction by Oxford Development Company which is repositioning the property as a new tech flex opportunity at 26th and Smallman Street. All in all, the Strip District has 1.2M SF of office space under construction with an additional 300,000 SF that has been announced.

New York Developer Acram Group (Formerly JMC Holdings) has started demolition on the longtime vacant Wholey Building, with plans to build a new 23-story office tower on the site which will be dubbed 1520 Smallman. The project site offers a unique advantage as it rests within the Golden Triangle commercial zoning boundary, allowing for the project to achieve heights that would not be permitted elsewhere in the Strip District under the Riverfront Zoning Ordinance (RIV). The new office project is expected to cost upwards of \$200M and add 525,000 SF of trophy office space, 900 parking spaces, and 17,000 SF of retail.



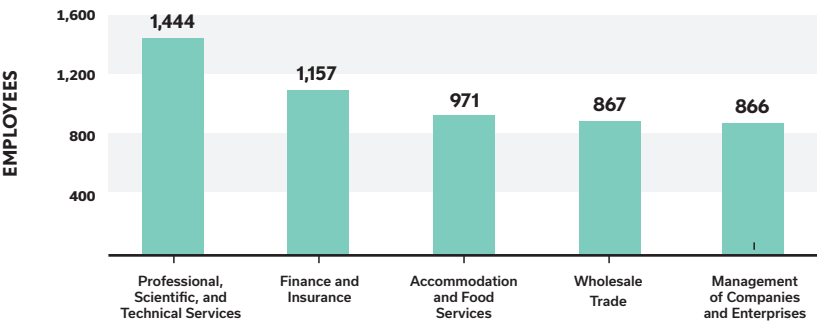
1520 Smallman is a new 23-story office building developed by Acram Group and designed by and Brooklyn-based Brandon Haw Architecture, will add 525,000 square feet of office space to the Strip District, the hub of Pittsburgh's booming tech sector.

Strip District Wages



Source: OnTheMap—Local Employment Dynamics Partnership, U.S. Census Bureau (2018)

Top 5 Employment Sectors



Source: OnTheMap—Local Employment Dynamics Partnership, U.S. Census Bureau (2018)

DOWNTOWN FRINGE CLASS A

10.2%

DIRECT VACANCY RATE

\$28.24

AVERAGE LEASE RATE

Source: CBRE, Q1 2021

DOWNTOWN FRINGE CLASS B

15.2%

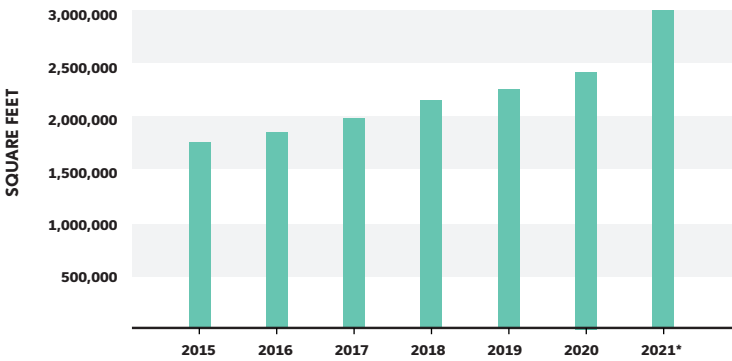
DIRECT VACANCY RATE

\$23.55

AVERAGE LEASE RATE

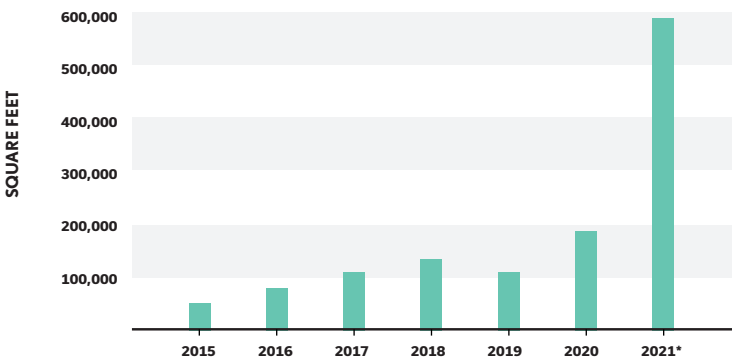
Source: CBRE, Q1 2021

Office Market Growth by Year



*Note: 2021 includes square footage that is currently under construction or renovation
Source: JLL.

New Office Space Added per Year



*Note: 2021 includes square footage that is currently under construction or renovation
Source: JLL.

- **2.4M** leasable square feet in Strip District, **9%** of the Greater Downtown office market
- **1.5M SF** of office space in the pipeline



Oxford Development Company is renovating the former 54,000 SF Achieva building into Factory 26, a mix of commercial office and tech-flex space for R&D, light manufacturing, and showrooms designed by DLA+ Architecture.



Image: Helm On Allegheny Riverview Rendering

HOUSING & POPULATION

RESIDENTIAL GROWTH

It is estimated that nearly 2,000 residents call the Strip District home. Since 2015, the residential population has more than doubled, representing a 150% increase within five years. The Strip currently has 1,425 rental and condo units combined and there are currently 730 units under construction with an additional 530 units announced that are expected to deliver within the next few years. Once these new units are completed, the Strip might see its current residential population double again within the next 2–3 years.

1,425

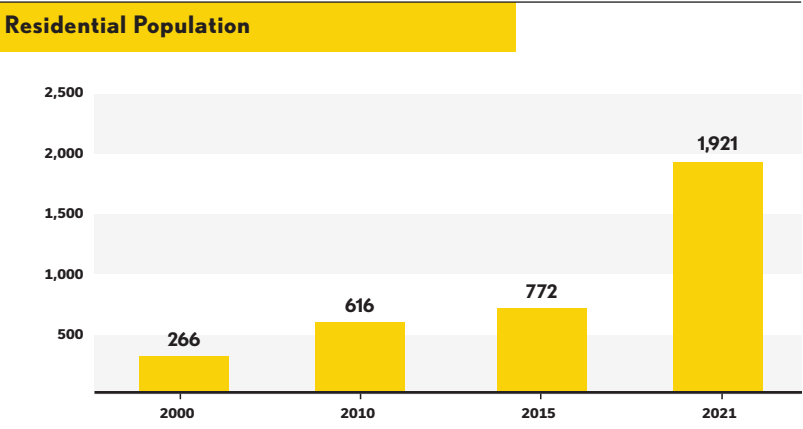
EXISTING RESIDENTIAL UNITS

1,260

UNITS IN THE PIPELINE



Columbus-based Oxide Real Estate Development and Schiff Capital Group are building a six-story apartment building totaling 114 units. The project is being designed by Hord Coplan Macht.



*2021 data are conservatively calculated based on residential unit growth and occupancy rate estimates for residential properties. Sources: U.S. Census Bureau; Pittsburgh Downtown Partnership

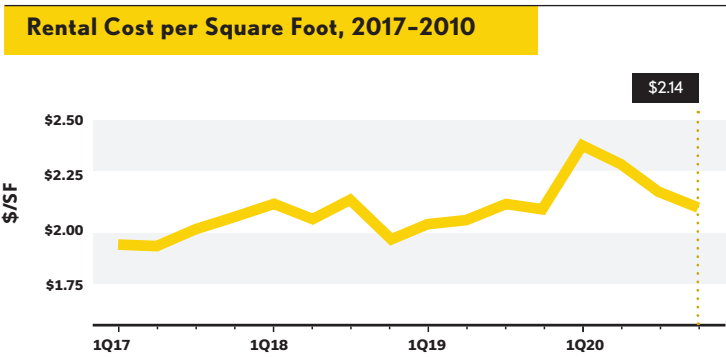
2021 Home Value Comparative Statistics, Q1

	15222 ZIP CODE (Golden Triangle, Strip District)	CITY OF PITTSBURGH	ALLEGHENY COUNTY	PA	US
MEDIAN ESTIMATED HOME VALUE	\$467,000	\$218,000	\$221,000	\$254,000	\$249,000
12-MONTH CHANGE	+5%	+3%	+3.9%	+2.8%	+2%
PERCENT OWNERS	17%	48%	65%	69%	64%
PERCENT RENTERS	83%	52%	35%	31%	36%

Source: Realtors Property Resource—Provided by Piatt Sotheby’s International Realty

While there was a slight softening in the residential market in the Strip due to the COVID-19 pandemic, the neighborhood remains resilient and poised to welcome new residents to the community. Current rental occupancy remains high at 95% occupied as of Q4 2020. This represents about a 5% decrease compared to pre-covid, as rental units were nearly completely leased up at 99% at the end of 2019. Throughout 2020 rental rates declined as a natural response to the economic conditions brought on by the pandemic. Rates peaked at \$2.32 SF in Q1 2020 and ended the year at \$2.14 SF.

Although many new units delivered in the Strip in recent years, (62% of the current rental inventory was delivered within the last five years), the market data is a testament to the strength and appeal of the neighborhood as an attractive place to live. Residents are seeking an urban environment that is close to Downtown with a range of amenities, including riverfront access, and exciting new developments.



Source: Pittsburgh Downtown Partnership



Aerial image showing the 442-unit new construction project, The District, which will open in 2022 at 17th Street and Waterfront Place. The project is part of Phase Two of the Riverfront Landing development by NRP Group and The Buncher Company. East of The District, you can view sister property, Edge 1909, which opened in 2018 with 364 units, and to the right of both riverfront developments, you can view Laurel Communities Strip District Brownstones Townhomes.

AVERAGE STUDIO RENT:

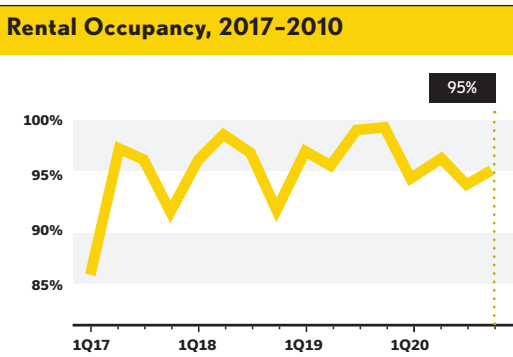
\$1,511

AVERAGE ONE BEDROOM RENT:

\$1,815

AVERAGE TWO BEDROOM RENT:

\$2,481

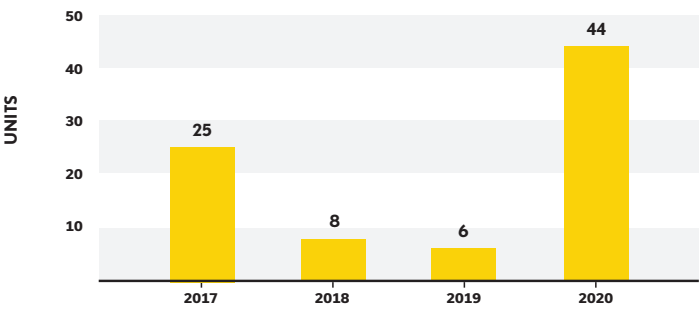


Source: Pittsburgh Downtown Partnership

CONDOMINIUM SALES

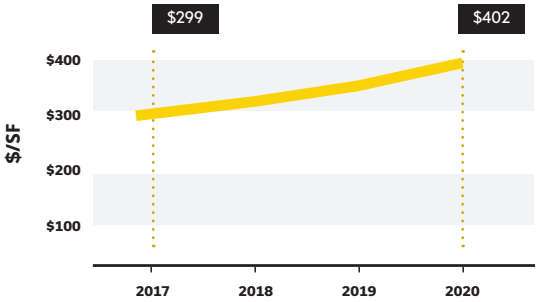
The Strip District closed on 44 properties in 2020, the highest record of closings in the neighborhood in several years. The increase in sales can be largely attributed to Hardy World's Refinery project which delivered in 2020 and 2554 Smallman. The availability of new high-end product led to an average cost per square foot of \$402, a 17% increase compared to 2019. In Q1 2021, the median list price of a home in the Strip District was \$484,900 compared to \$225,000 for a home within the City of Pittsburgh on average. Listings range from \$305,000 to \$2.25M depending on the size of the unit. At the end of Q1 2021, there were nine units listed for over \$1M. It is anticipated that condo sales will increase over the next few years as there are approximately 100 units in the pipeline.

Condo Units Sold per Year



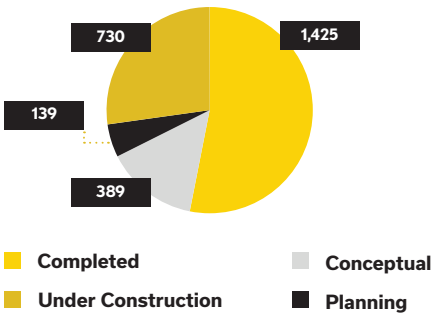
Sources: Allegheny County Real Estate Department; Western Pennsylvania Multi-List Service – Provided by Piatt Sotheby's International Realty

Average Condo Cost per Square Foot



Sources: Allegheny County Real Estate Department; Western Pennsylvania Multi-List Service – Provided by Piatt Sotheby's International Realty

Strip District Residential Units



Source: Pittsburgh Downtown Partnership

IN THE PIPELINE

Several large residential projects are currently under construction including the 442-unit new construction project, The District, underway at 21st Street and Waterfront Place. The project is part of Phase II of the Riverfront Landing development being pursued by NRP Group and The Buncher Company. In addition, Helm on the Allegheny is slated to open in August 2021. The property will include a variety of unit types including 32 shared co-living units and 33 affordable rate units in addition to 155 traditional market rate rentals. This project is being developed by SteelStreet Capital in partnership with Oxford Development Company. Oxide Real Estate Development will bring 114 new units to the edge of the Strip at 32nd Street and Penn Avenue. The development will offer a mix of studio, one- and two-bedroom units. Construction is anticipated to start in late 2021.



Developed by SteelStreet Capital and Oxford Development Company, Helm on the Allegheny is slated to begin leasing by summer 2021. The property will include a variety of unit types including 32 co-living units and 33 affordable rate units in addition to 155 traditional market rate rentals. WTW Architects is the designer on the project.

RETAIL & HOSPITALITY

PANDEMIC IMPACT

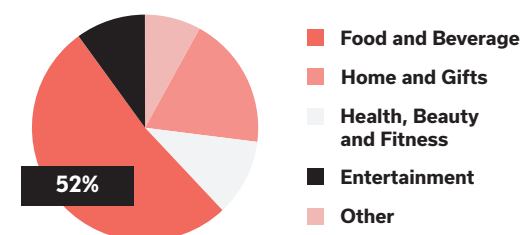
The pandemic dealt a severe blow to the hospitality industry worldwide in 2020. Statewide, restaurants and bars were required to shut down dine-in services on March 16, 2020. The subsequent closure of all non-essential businesses soon followed on March 19, 2020. Retailers were not allowed to reopen for in-person sales until May 15, 2020. Given that the Strip District is frequently cited as being among the top tourist attractions in the City and a favorite destination among locals, it's not surprising that the historic Penn Avenue shopping district in the Strip saw a 40% decline in visitor traffic in 2020 compared to 2019 levels. As of April 2021, data shows visitors are coming back to the Strip, however, visitor traffic continues to lag with activity 20% lower than pre-pandemic conditions of what a typical month would bring. Unfortunately, because of reduced foot traffic and restrictions placed on businesses, seven restaurants and retailers permanently closed in 2020 and through the first quarter of 2021.



Coop De Ville

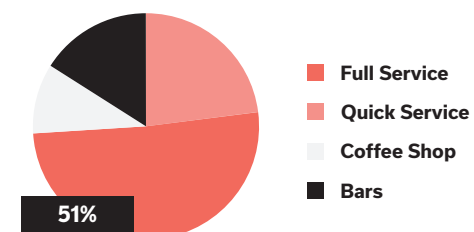


Retail & Service Businesses



Source: Pittsburgh Downtown Partnership

Food & Beverage Businesses



Source: Pittsburgh Downtown Partnership



PA Market Wine

Image: Wiggle Whiskey Distillery

On the bright side, the Strip welcomed 11 new restaurants and retailers in 2020 and through Q1 2021. Five new tenants were announced for McCaffery's Strip District Terminal redevelopment including City Grows, Fine Wine & Good Spirits, Envy Premier Nail Spa, Walk at Home, and OnPar Now, a locally-owned golf instruction business. McCaffery completed the \$62.6M rehab of the 1,533-foot-long Strip District Terminal redevelopment in the Strip District between 16th and 21st Streets. The historic development added over 65,000 SF of new retail opportunities with a minimum of 40,000 SF to be occupied by locally owned businesses. The Fine Wine & Good Spirits store along with two of the other announced tenants are currently open, OnPar Now and City Grows garden and gift shop. The developer is also nearing completion at 1600 Smallman, a 140,000 SF office project which will offer an additional 35,000 SF of ground-floor retail to complement the diverse retail and restaurant mix at the Strip District Terminal.

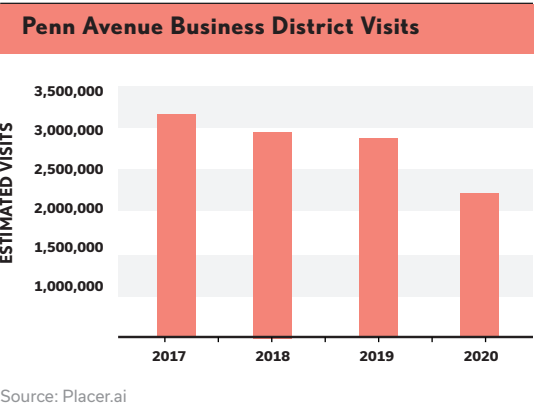
Pennsylvania Libations Wine Shop also opened in fall 2020 at 1700 Penn Avenue. The shop is a sister location to Pennsylvania Libations Spirits Shop, located at 2103 Penn Avenue. This new unique wine shop at 1700 Penn includes over 200 different wines from 20 unique Pennsylvania wineries and cideries. The 6,000 SF space also hosts a Helltown Brewing Taproom. You'll also find a wine-tasting area, event space, and full cocktail bar, along with 25 taps.

The owners of DiAnoia's Eatery and Pizzeria Davide opened a new concept, Pane è Pronto, at 2627 Penn Avenue in 2020. The daytime eatery features fresh-baked bread, ready-to-go meals, and fresh pasta. After years of waiting, Coop De Ville opened in the Strip. Created by the Richard DeShantz Restaurant Group, the Pittsburgh-famous fried chicken eatery offers southern-inspired sides like spicy collard greens and buttery biscuits. At Coop, you will also find a wide selection of homemade desserts and an all-day walk-up coffee window. The restaurant and café also double as a state-of-the-art retro entertainment center complete with duck pin bowling, arcade games, pool, ping pong tables, and more.

On the services side, Huntington Bank is opening a new branch at 1800 Smallman in 2021. The design of the branch will be unique and will reflect the natural industrial and modern feel of the Strip. A few blocks away, F.N.B. Corp. is also planning on opening a First National Bank branch at 1630 Penn Avenue on the site that previously housed a McDonald's restaurant; it is slated to open in late 2022. These new amenities will serve as assets for the growing residential population and small businesses in the neighborhood.



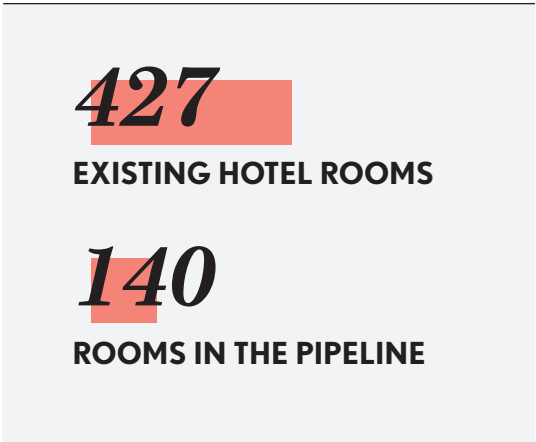
Strip District Terminal



HOTEL AND TOURISM

As a result of the pandemic, the hotel industry experienced the most devastating year on record in 2020. Today, the Strip District offers 427 hotel rooms and is prepared to support the growing visitor population that 2021 is expected to bring. In 2020, the Strip District received Trip Advisor's Travelers' Choice award, given to attractions, accommodations, and restaurants that consistently earn great reviews from travelers.

Despite the challenges of the year, The Senator John Heinz History Center is expected to expand. In spring 2021, the Heinz History Center acquired more land which will eventually advance the museum's long-term plans to expand the museum's offerings to include classroom space, visitor center, additional galleries, and possibly a new 140-room history themed hotel.



Notable Retail & Restaurant Openings

2020-2021

TRANSPORTATION

PUBLIC TRANSIT

The Strip District has 5 bus routes that carry over 5M people a year through the neighborhood. The 26 bus stops serve over 2,000 people every day and from 2015 to 2019 the Strip saw an increase of over 500 weekday transit riders. In 2020, the Strip saw a decrease in total ridership due to the pandemic. Despite the declines in systemwide ridership that most cities experienced in 2020, public transportation remains an essential and critical amenity to Strip District residents, workers, and the business community.

BIKES

The Strip had over 7,180 Healthy Ride Bike Share trips in 2020 across 8 stations in the neighborhood. The Pittsburgh Downtown Partnership's 1200 Penn Avenue bike lane Eco-Counter, recorded a total of 159,795 annual rides and an average of 437 average counts per day between April and November 2020.

Cost Comparison Between Transportation Modes

COST	
ConnectCard via Port Authority	\$2.50/full-fare ride (includes transfer within 3 hours of tapping card)
Average Daily Parking Rate	\$16 (up to 12 hours)
Healthy Ride Bike Share	\$2.00/30 minutes
Scoobi Rental Cost	\$2.00 to unlock, \$0.30/minute and \$0.15/minute when ride is paused

Top 10 Bus Stops

STOP NAME	
LIBERTY AVE OPP 21ST ST FS	LIBERTY AVE OPP 26TH ST
LIBERTY AVE AT 21ST ST	LIBERTY AVE OPP 27TH ST
PENN AVE AT 31ST ST	PENN AVE AT 32ND ST
LIBERTY AVE AT 25TH ST	26TH ST AT PENN AVE FS (SPRING WAY)
LIBERTY AVE AT 29TH ST FS	LIBERTY AVE OPP 31ST ST

Downtown Parking at a Glance

- **1,880** publicly available parking spaces/**3,580** spaces in the pipeline
- **\$12.60** Average Daily Parking Rate
- **\$172** Average Monthly Parking Rate
- Parking utilization peaks at 1:00 p.m. on weekdays and 10:00 a.m. on weekends

GETTING AROUND THE STRIP



BY FOOT

- Takes less than 30 minutes to walk across the 1.5 mile length of the Strip District by foot
- The quarter mile width of the neighborhood allows for easy access to the riverfront trail, commercial core, and transit along Liberty Avenue
- The Three Rivers Heritage Trail is a multi-use, 24-mile riverfront trail system with trail segments in the Strip District



BY BIKE

- The Strip District has over 1 mile of dedicated bike infrastructure, including trails and bike lanes
- 8 Healthy Ride Bike Share Stations



BY PUBLIC TRANSIT

- 5 bus lines across the system serve the Strip District (54 – North Side-Oakland-South Side, 86 – Liberty, 87 – Friendship, 88 – Penn, 91 – Butler Street)

Image: Healthy Ride Bike Share Station at the corner of 26th and Railroad Streets

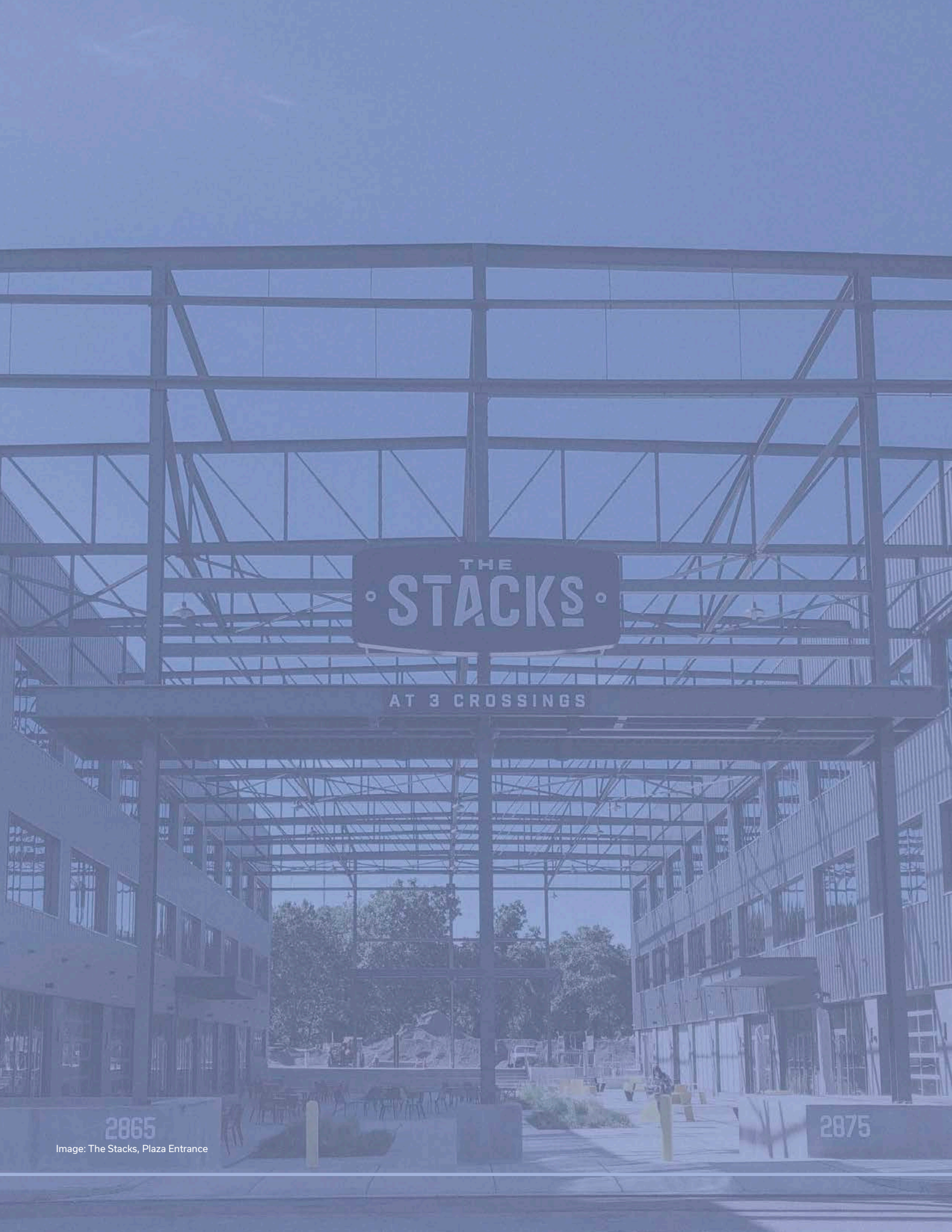


Image: The Stacks, Plaza Entrance

DEVELOPMENT

Strip District Investment		
	UNDER CONSTRUCTION	PROJECTS PLANNED
PROJECTS	15	8
OFFICE SPACE	1.2M SF	300,000 SF
RESIDENTIAL UNITS	730	528
HOTEL ROOMS	-	140
RETAIL & RESTAURANT SPACE	113,100 SF	37,000 SF
PARKING SPACES	1,850	1,726

Source: Pittsburgh Downtown Partnership



The Vision on Fifteenth

BUILDING ACTIVITY

Despite the challenges of the pandemic, the Strip District saw a 36% increase in building permit volume and an 89% increase in total permit value in 2020 compared to 2019. Over the past decade (2011–2021), total investment in the Strip District exceeded \$1.5B in project costs; \$624.4B of this amount comes from completed projects, \$790.1M is in active projects, and \$98M is attributed to projects that have been announced.



\$624.M
COMPLETED

\$790.1M
ACTIVE

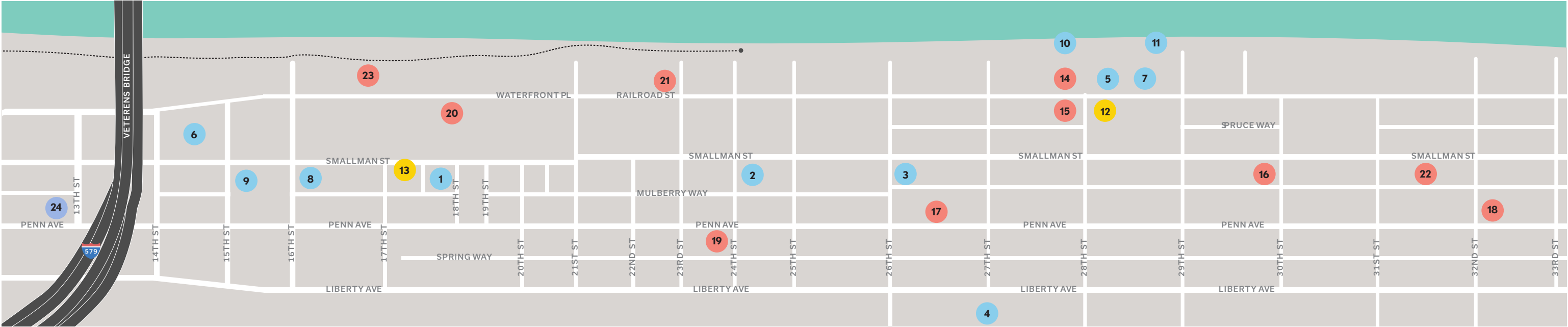
\$98M
ANNOUNCED

\$1.5B
TOTAL

Source: Pittsburgh Downtown Partnership

INVESTMENT MAP

2021 | SECOND QUARTER



Investments from January 2011 - May 2021	
PROJECTS COMPLETED	\$624,400,000
PROJECTS ACTIVE	\$790,100,000
PROJECTS ANNOUNCED	\$98,000,000

TOTAL INVESTMENTS	\$1,512,500,000
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OFFICE/RETAIL

- 1 Huntington National Bank
- 2 Pro Bike + Run and Cadence Clubhouse
- 3 Factory 26 (Achieva Building)
- 4 Dollar Bank Liberty Commons Reno/Exp.
- 5 75 Hopper Place at 3 Crossings Phase
- 6 Vision on Fifteenth
- 7 The Stacks at 3 Crossings
- 8 1600 Smallman Street
- 9 1520 Smallman (Wholey Building)
- 10 3 Crossings Phase 2 - Building B *
- 11 3 Crossings Phase 2 - Buildings F1 & F2 *

TRANSPORTATION

- 12 The Hive at 3 Crossings
- 13 Smallman Street Public Improvements II

RESIDENTIAL

- 14 3 Crossings Phase 2 - Building A *
- 15 3 Crossings Phase 2 - Building I
- 16 2926 Smallman Street (Penrose) *
- 17 Forte Condominiums
- 18 32nd and Penn Avenue Apartments
- 19 Penn 23 (2330 Penn Avenue)
- 20 Strip District Brownstones
- 21 Helm on the Allegheny
- 22 3150 Smallman Street
- 23 The District

HOTEL/ENTERTAINMENT

- 24 Heinz History Center Expansion *

* Indicates a conceptual project

All other projects are in planning or under construction

This ongoing list represents active and publicly announced projects in the Strip District as of May 2021. Projects are listed in three categories: announced means a project has been publicly announced and/or a construction schedule has been determined and due diligence is under way, active means that ground has been broken, and completed means there is no longer active construction at the project site.

Source: Pittsburgh Downtown Partnership

ACKNOWLEDGMENTS

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