



SPRING GARDEN

BLOOMFIELD

EAST ALLEGHENY

POLISH HILL

STRIP DISTRICT

UPPER HILL

ALLEGHENY CENTER

BEDFORD DWELLINGS

SHADYSIDE

MIDDLE HILL

NORTH OAKLAND

CRAWFORD-ROBERTS

TERRACE VILLAGE

SQUIRREL HILLS

CENTRAL BUSINESS DISTRICT

WEST OAKLAND

OAKLAND

ECONOMIC DEVELOPMENT
AND URBAN DESIGN STUDIES

CENTRAL OAKLAND

SOUTH SHORE

SOUTH OAKLAND

OCTOBER 2020

SOUTH SIDE FLATS

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AUGUST 2020

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SOUTH SHORE

SOUTH OAKLAND

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KEY TAKEAWAYS

Population Trends

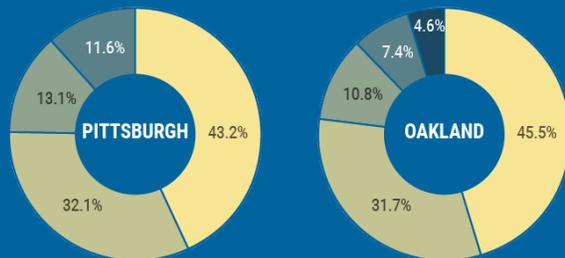
Oakland and National Innovation Neighborhoods, 2000–2019



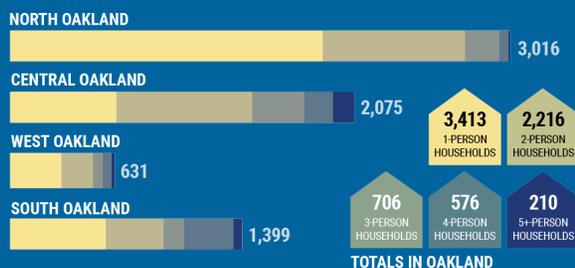
Households by Household Size

Pittsburgh and Oakland, 2018

■ 1-person households
 ■ 2-person households
 ■ 3-person households
■ 4-person households
 ■ 5-person (or more) households



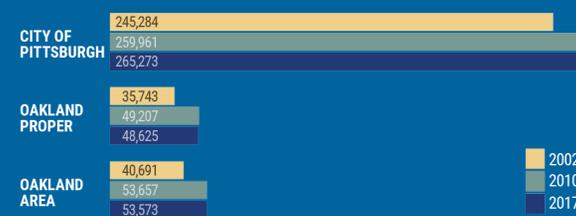
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Source: U.S. Census 2000 and 2010; American Community Survey 2018 5-Year Estimates

Job Trends

The City, Oakland Proper and the Oakland Area | 2002–2017



Source: LEHD Origin-Destination Employment Statistics

Education and Healthcare Workers in Oakland



Source: LEHD Origin-Destination Employment Statistics

Oakland is 20% of Pittsburgh's overall job base, but 46% of its healthcare and education jobs.

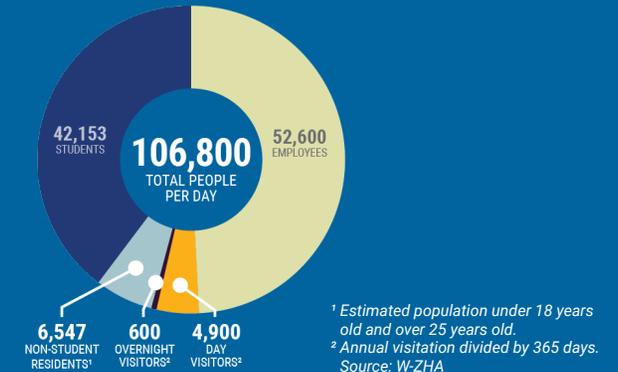
41,495 healthcare/education jobs

66% of all education jobs in Pittsburgh

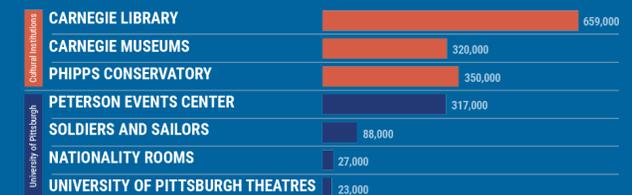
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Daily Activity (During School Year)

Oakland, 2017



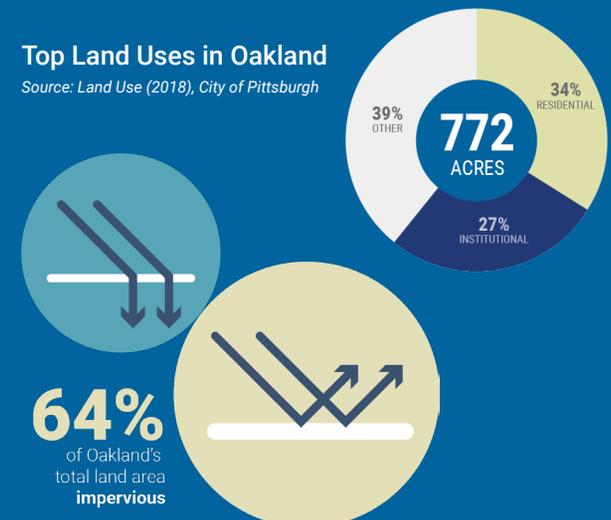
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Source: Oakland Business Improvement District, Retail Market Study (2015); University of Pittsburgh, Community and Governmental Relations; Visitorship confirmed in 2019 with organization representatives.

Top Land Uses in Oakland

Source: Land Use (2018), City of Pittsburgh



Acronyms and Abbreviations

AADT	Annual Average Daily Traffic
ACS	American Community Survey
ADA	Americans with Disabilities Act
AMI	Area Median Income
BRT	Bus Rapid Transit
CBD	Central Business District
CBRE	Coldwell Banker Richard Ellis
CMU	Carnegie Mellon University
CSO	Combined Sewer Overflow
DCP	Department of City Planning
DOMI	Department of Mobility and Infrastructure
FTE	Full-Time Equivalent
GAP	Great Allegheny Passage
HH	Household
HUD	Department of Housing and Urban Development
IMP	Institutional Master Plan
LED	Light-emitting diode
LEHD	Longitudinal Employer–Household Dynamics
LERTA	Local Economic Revitalization Tax Assistance
MARTA	Metropolitan Atlanta Rapid Transit Authority
MBTA	Massachusetts Bay Transportation Authority
MIT	Massachusetts Institute of Technology
MUH	Montefiore University Hospital
NCAA	National Collegiate Athletic Association
NICU	Neonatal Intensive Care Unit
NIH	National Institutes of Health
OBID	Oakland Business Improvement District
OPDC	Oakland Planning and Development Corporation
PADEP	Pennsylvania Department of Environmental Protection
Pitt	University of Pittsburgh
PNC	PNC Financial Group Services
PTC	Pittsburgh Technology Center
PUH	Presbyterian University Hospital
PWSA	Pittsburgh Water & Sewer Authority
R&D	Research & Development
TBD	To be determined
TDM	Transportation Demand Management
UC	Under-Construction
URA	Urban Redevelopment Authority of Pittsburgh
UPMC	University of Pittsburgh Medical Center
VA	Veteran Affairs
WPIC	Western Psychiatric Institute and Clinic

INTRODUCTION

Purpose

This Existing Conditions Report for the Oakland Plan provides a common set of tools, baselines, and data for discussion during the neighborhood plan process, based on a variety of sources including the Census, market transactions, City and County data sources, site surveys, and analysis. Community members and participants will bring their own experiences, needs, history, and deeper understanding to many topics that data cannot fully address.

The City of Pittsburgh, led by the Department of City Planning (DCP) is working with the Oakland community to create a 10-year plan with a shared vision for Oakland's future and the projects and programs necessary to make that vision a reality.

Once adopted by the Planning Commission, the Oakland Plan will become City policy and guide public and private investments in the area. New land use regulations, transportation and infrastructure improvements, and public programs may also be recommended by the plan. The plan area generally includes the areas of North Oakland, Central Oakland, South Oakland, and West Oakland.



PHOTO COURTESY OF THE UNIVERSITY OF PITTSBURGH

The City of Pittsburgh conducts planning efforts based on the Neighborhood Plan Guide, which establishes standards for plans that will be adopted by the City Planning Commission. The Oakland Plan will establish vision statements that provide a shared description of what the neighborhood will be in 10 years if the plan is successful and determine goals that the plan will achieve by implementing programs, policies, and projects.

More information about this guide can be found at: <https://pittsburghpa.gov/dcp/neighborhood-planning-guide>.

The Oakland Plan will address a core set of topics, including: Community, Development, Mobility, and Infrastructure. The Community topic focuses on meeting the needs of residents, employees, students, and stakeholders. The Development section focuses on maximizing the benefits of new development for the community. The Mobility section focuses on making it easier, safer, and healthier for people to get around. The Infrastructure section focuses on nourishing neighborhoods through new energy, stormwater, and open space systems.

The Department of Mobility and Infrastructure (DOMI) will be leading additional planning work for the Mobility Chapter to address transportation, in its various forms, and parking. As part of that effort, DOMI and its consultants will be collecting and analyzing new data on commute and travel patterns, parking, and transit use in the Oakland area to support a well-connected, safe, accessible, and multi-modal Oakland. Independent of this

planning effort, DOMI and DCP will be conducting long-term, citywide planning efforts, including the 2070 Mobility Plan and Citywide Comprehensive Plan, that may offer additional context for the Oakland Plan and spur new ideas and evaluation during the community planning process.

The open data tools and analysis provided through the Western Pennsylvania Regional Data Center were an essential data source for this report and ongoing tool for community evaluation and analysis. Additional resources provided by the data center can be found: <http://www.wprdc.org/>.

Previous Planning Studies

This Existing Conditions Report builds upon the findings of recommendations of several community planning efforts and research, including, among others:

- The Oakland Plan 2025 (Oakland Planning and Development Corporation, 2010)
- Innovation Oakland (2010)
- Oakland Retail Market Study (Oakland Business Improvement District, 2015)
- Green First Plan (Pittsburgh Water & Sewer Authority, 2016)
- Capturing the next economy: Pittsburgh's rise as a global innovation City (Brookings Institute Report, 2017)

In addition to several citywide planning and community development initiatives, including, among others:

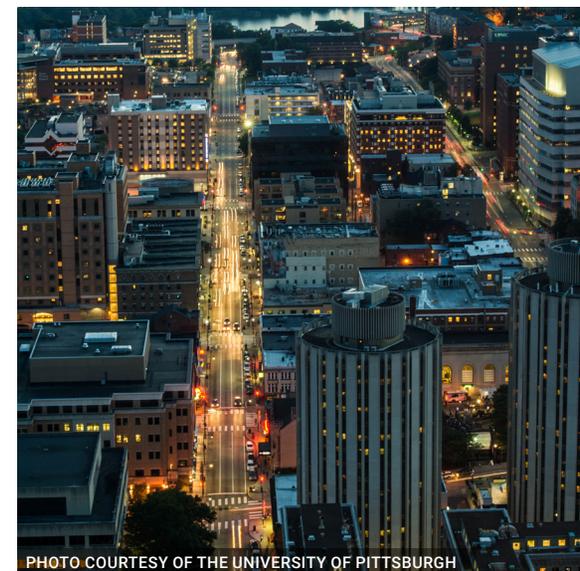


PHOTO COURTESY OF THE UNIVERSITY OF PITTSBURGH

- The Affordable Housing Task Force Report (2016)
- City Steps Master Plan (2017)
- Open Space PGH (2013)
- Preserve PGH (2012)

Many community members, stakeholders, and leaders who participated in the neighborhood planning process and offered their expertise as part of interviews to inform this report.

CHAPTER ONE: OAKLAND THE NEIGHBORHOOD

Key Takeways

- Oakland is a neighborhood of about 20,000 residents, representing about one of every fifteen Pittsburgh residents. It is also an employment and education center. Home to two major hospitals (with a third one adjacent), three universities, and several destination secondary schools and cultural institutions, Oakland's population swells to nearly 107,000 people each weekday during the school year. This includes over 42,000 university students and 2,000 primary or secondary school students. Later chapters address Oakland's workforce and visitors in more detail. Oakland's residential population is about the same as it was in 2000, having risen slightly until 2010 then declined.
 - About two thirds of Oakland's residents are in the 15-24 age range dominated by university students. Most university students live in Central and North Oakland, but they also represent the largest age cohort in West and South Oakland. About one third of Oakland residents are not in the 15-24 age range; apart from some advanced graduate students, most are not university students, and represent a wide variety of short- and long-term resident households.
 - Oakland's household count declined about 9% between 2010 and 2018, led by loss of 13% and 15% of households in Central and North Oakland respectively. Meanwhile, the number of households in West and South Oakland increased, concurrent with a loss of 29% and 26% of family households respectively. As little new housing was constructed in this period, this suggests a significant number of family dwellings were subdivided into apartments.
 - The racial composition of Oakland's residents includes half the share of Black residents, twice the share of Asian residents, 20% more White residents, and about the same share of Hispanic residents as in Pittsburgh overall.
- These discrepancies have been widening. Racial composition varies considerably around Oakland, with Black residents most represented in West Oakland, Asians in North Oakland, and Whites in Central Oakland. South Oakland comes closest to the city's overall race and ethnicity breakdown.
- The average educational attainment level of Oakland residents is higher than the city as a whole, but lower than in the established or re-emerging neighborhoods of downtown, Strip District, South Side Flats, Shadyside, and Squirrel Hill.
 - Other examples of neighborhoods with dominant university populations and employment include Philadelphia's University City, Cambridge's Kendall Square, and Midtown Atlanta. Unlike Oakland, each of those neighborhoods has had substantial population growth since 2010.

DATA SOURCES AND PEER NEIGHBORHOODS

- Unless otherwise noted, this analysis uses American Community Survey (ACS) 5-Year Estimates for 2014–2018, the most recent span available, to allow for consistent comparisons over time. The ACS is an ongoing survey from the U.S. Census Bureau. It is the premier source for detailed population and housing information about U.S. communities and how they change over time.
- To better understand Oakland’s role in the city and the innovation economy, Oakland was compared to a set of mixed-use innovation neighborhoods both within the City of Pittsburgh and nationally.
- Within the city, these peer neighborhoods include the Central Business District, Strip District, Lawrenceville, and South Side Flats. These neighborhoods are all mixed-use areas with residential areas and significant employment, particularly in innovation-focused industries like research, technology, specialized manufacturing, and design. They also have been a destination for innovation-focused development and redevelopment in recent years.
- Nationally, the peer innovation neighborhoods include University City in Philadelphia, Kendall Square in Boston, and Midtown in Atlanta.

Oakland is a community of almost 20,000 people across four city-designated areas: North, Central, South, and West Oakland.

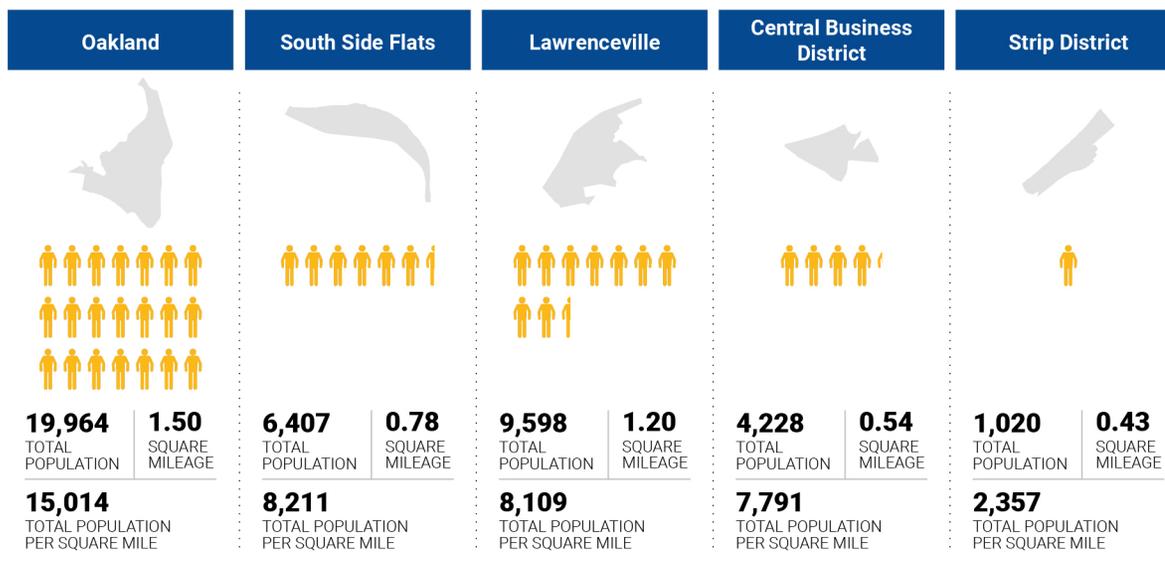
Oakland is approximately 1.5 square miles total in size. North Oakland is a half square mile. South Oakland, including the Pittsburgh Technology Center along the riverfront, is a similar size. Both Central Oakland and West Oakland are about half the size of the other areas.

The **majority of residents live in North and Central Oakland.** These areas have twice the population density of South and West Oakland. Oakland’s population represents 6.6% of the

City’s population. Its population density – 15,000 people per square mile – is double that of other mixed-use innovation neighborhoods, including the Central Business District (CBD), Lawrenceville, and South Side Flats. Oakland has a much larger residential population than these other areas.

Oakland’s population has been relatively stable over the last 20 years. Oakland gained almost 2,000 residents from 2000-2010, while the CBD, Lawrenceville, and the City of Pittsburgh overall were losing population. Since 2010, these trends have reversed. Oakland lost over 2,000 residents from 2010-2018; over the same time period, the CBD has gained 1,500 residents.

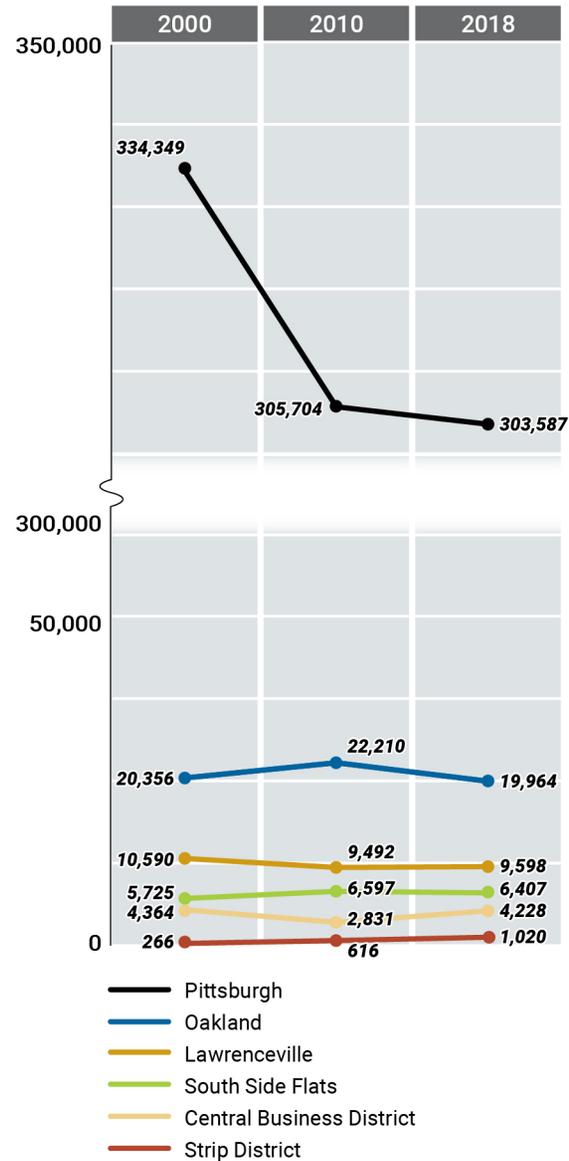
Oakland and Pittsburgh Innovation Neighborhoods Population and Density, 2018



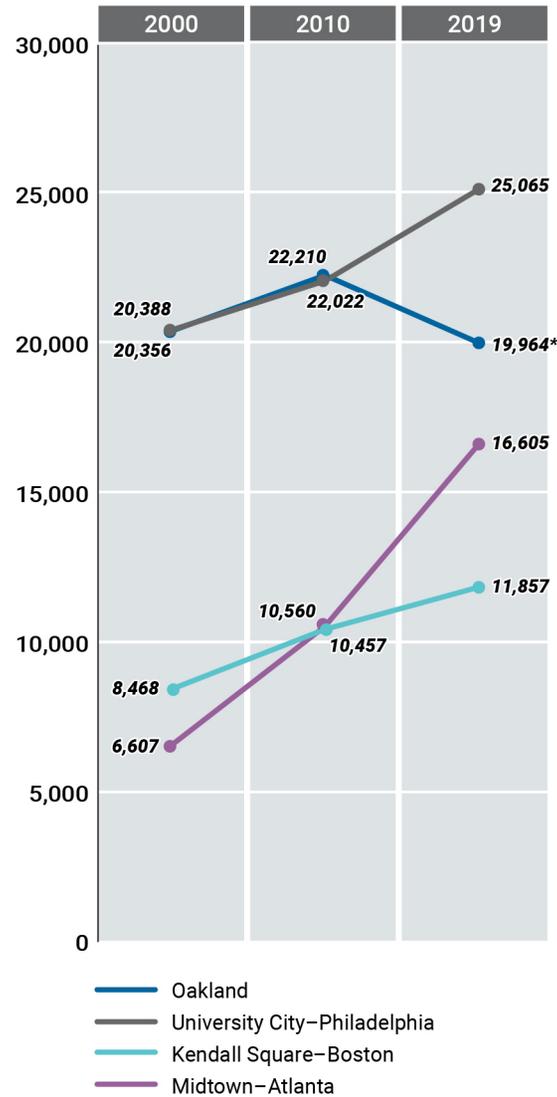
 = 1,000 people

Note: The Allegheny and St. Mary’s cemeteries were not included in Lawrenceville’s land area for this analysis. Source: ESRI.

Population Trends | Pittsburgh, Oakland, and Pittsburgh Innovation Neighborhoods



Population Trends | Oakland and National Innovation Neighborhoods



Oakland's Population Compared to National Innovation Neighborhoods

Oakland has more neighborhood residents than Cambridge's Kendall Square or Atlanta's Midtown, but is similar in population to Philadelphia's University City. Residents are essential to sustaining a live-work-play environment and ensuring activity and vibrancy outside of business hours.

Each of these other innovation neighborhoods have grown consistently in population since 2000. Oakland lost population between 2010 and 2018.

* Oakland 2019 data is a 2018 5-Year estimate.
Sources: United States Census, 2000 and 2010; ESRI for Other Innovation Neighborhoods' 2019 population; American Community Survey 2018 5-Year Estimates

Over two-thirds of Oakland's residents – 13,000 – are between 15-24 years old. They live in all neighborhoods of Oakland.

This percentage is likely higher, as many students may claim their parents' home address as their place of residence during school and thus not be counted by the ACS. As would be expected from the presence of the University of Pittsburgh, Carnegie Mellon University, and Carlow University, Oakland has a population profile similar to a college town.

There are as many early career aged residents in Oakland as there are in Lawrenceville and the Southside Flats.

While considerably smaller in overall population size than Oakland, Lawrenceville and South Side Flats have more 25-34 year olds than Oakland.

Oakland's residents are overwhelmingly young. Only 16% of Oakland's population is in the prime working age cohort of 25 to 54 years old. In other Pittsburgh innovation neighborhoods this cohort ranges from 40% to 76% of residents.

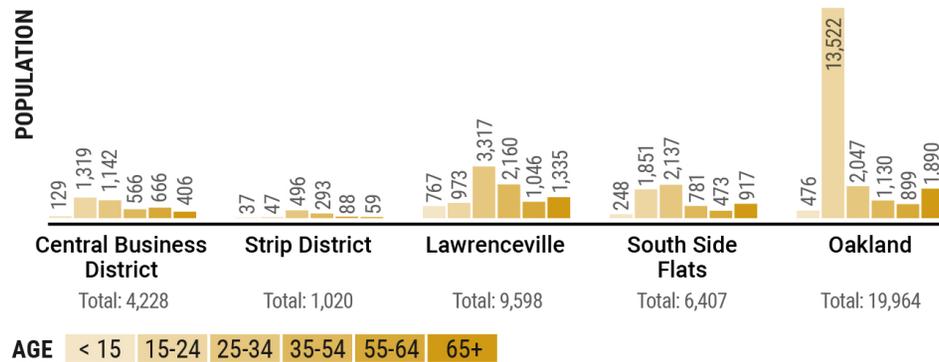
There are school-aged children in every neighborhood of Oakland.

South Oakland has the greatest number of school-aged children, while Central Oakland has the least. Overall, 2.4% of Oakland residents are children under the age of 15, compared to 8.7% for Pittsburgh overall.

Oakland has comparatively fewer residents age 55-74 than the city overall, but comparatively more residents over the age of 75.

Pittsburgh overall has 12.1% of residents aged 55 to 74 and 2.4% over the age of 75, compared to 8.3% and 5.7% for Oakland. Residents over the age of 75 are more likely to move in search of different housing or care types within ten years than residents aged 55-74.

Population by Age | Oakland and Pittsburgh Mixed-Use Districts, 2014-2018 5-year estimate



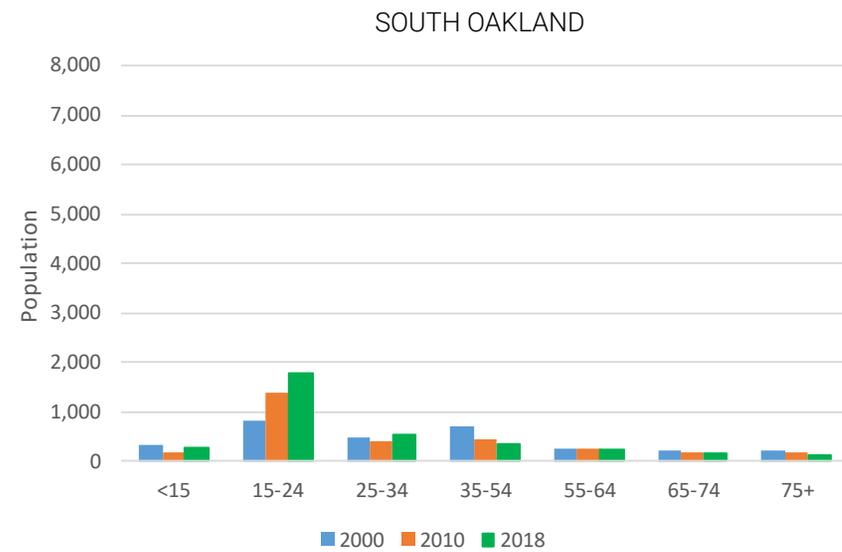
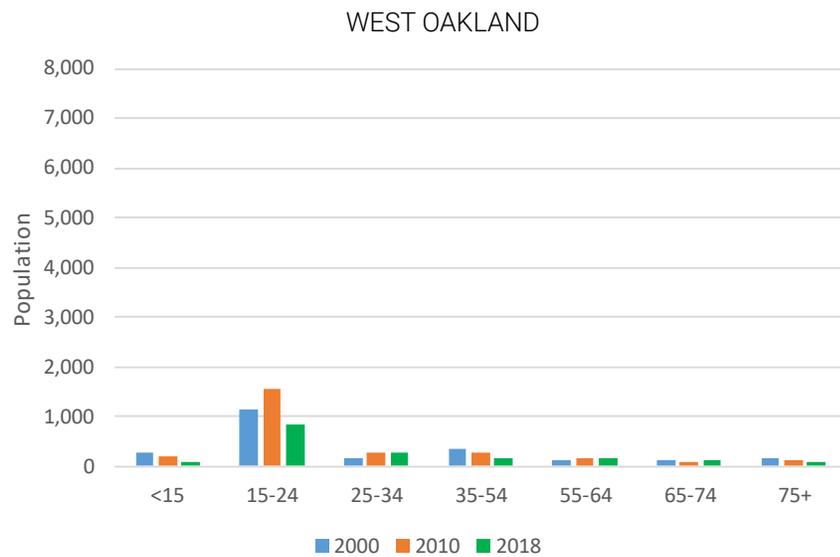
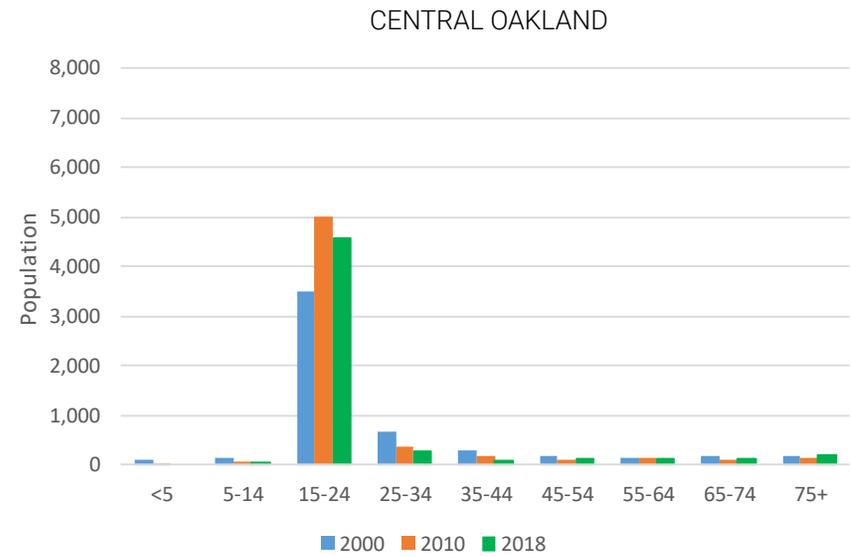
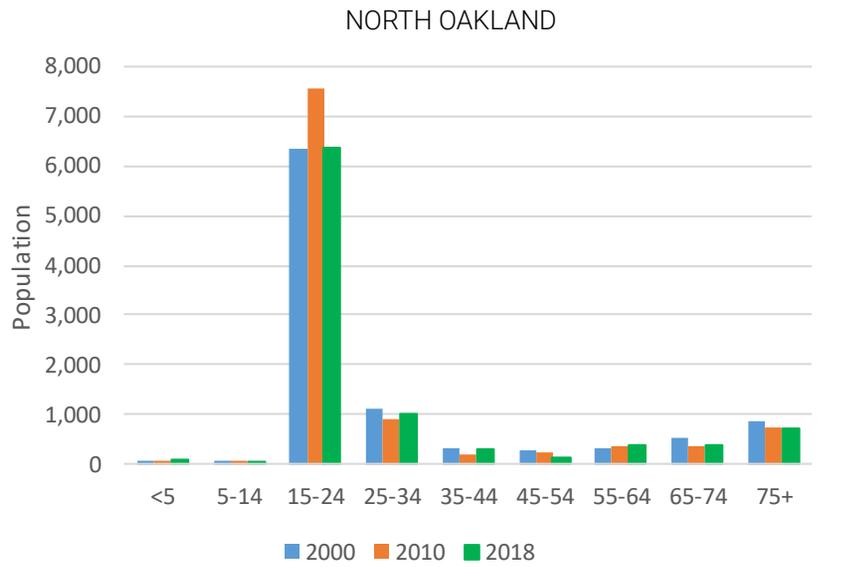
Source: American Community Survey 2018 5-Year Estimates

Age Distribution by Oakland Neighborhood, 2014-2018 5-year estimate

	North Oakland		Central Oakland		West Oakland		South Oakland	
	#	% of Total	#	% of Total	#	% of Total	#	% of Total
<5	66	0.7%	0	0.0%	47	2.8%	84	2.5%
5-14	50	0.5%	15	0.3%	42	2.5%	172	5.0%
15-24	6,357	67.9%	4,568	83.1%	817	48.0%	1,780	52.3%
25-34	996	10.6%	271	4.9%	263	15.4%	517	15.2%
35-44	280	3.0%	86	1.6%	53	3.1%	164	4.8%
45-54	110	1.2%	134	2.4%	119	7.0%	184	5.4%
55-64	387	4.1%	125	2.3%	169	9.9%	218	6.4%
65-74	380	4.1%	108	2.0%	100	5.9%	169	5.0%
75-84	731	7.8%	191	3.5%	93	5.5%	118	3.5%
TOTAL	9,357	100.0%	5,498	100.0%	1,703	100.0%	3,406	100.0%

Source: American Community Survey, 2018 5-Year Estimates

Age Over Time



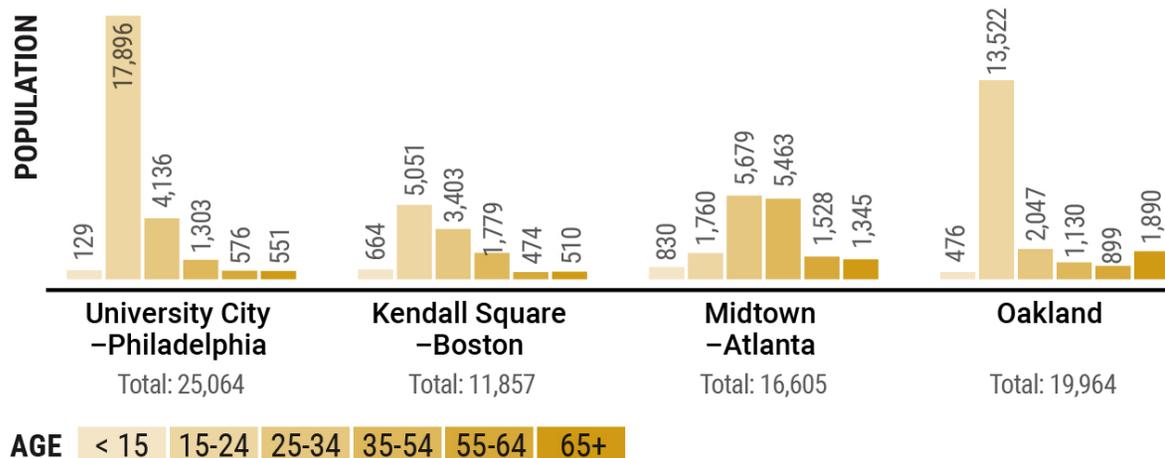
Source: American Community Survey, 2018 5-Year Estimates

Oakland has the smallest number of residents age 25-34 years old of any of the national innovation neighborhoods.

Oakland has fewer 25-34 year olds in terms of absolute population and as a percentage of neighborhood population. Oakland and University City both have high concentration of students age 18-24, but University City has many more residents aged 25-34 years old as compared to Oakland – 4,136 to Oakland’s 2,047. Over half of the population residing in Kendall Square and Midtown are over the age of 25.

POINT OF DISCUSSION
How can Oakland retain its young professionals after they graduate and start working?

Population by Age | Oakland and National Innovation Neighborhoods, 2019



Sources: ESRI; American Community Survey 2018 5-Year Estimates

Oakland residents are highly-educated.

The percentage of the population over 25 years of age with an advanced degree is considerably higher in Oakland than it is in the city as a whole. Over 56% of Oakland residents have completed at least a Bachelor's degree, compared to 43% of the city overall. Over 30% of those that live in Oakland have a graduate or professional degree.

Among the Pittsburgh innovation neighborhoods, Lawrenceville has the greatest absolute number of residents with a Bachelor's degree or higher. Moreover, the share of persons over the age of 25 with a Bachelor's degree is much higher in the CBD and the Strip than in Oakland. This indicates that other Pittsburgh innovation neighborhoods are attractive locations for well-educated young workers.

As a point of comparison, in both Shadyside and Squirrel Hill over 50% of the population aged 25 or older has a graduate or professional degree.

Compared to National Innovation Neighborhoods

Oakland has a markedly different profile in terms of age and educational attainment compared to other innovation neighborhoods.

Oakland has comparatively fewer residents over the age of 25. Just over half of Oakland residents over the age of 25 have a Bachelor's degree or higher.

Educational Attainment | Population Over 25 Years Old | Oakland and Pittsburgh Districts, 2018

	Population Over 25 Yrs Old				Bachelor's or Higher		
	Total Pop 25+	Bachelor's	Graduate/Prof Degree	Bachelor's or Higher	Bachelor's or Higher		
Central Business District	2,780	872	31.4%	1,201	43.2%	2,073	74.6%
Strip District	936	415	44.3%	391	41.8%	806	86.1%
Lawrenceville	7,858	2,481	31.6%	1,692	21.5%	4,173	53.1%
South Side Flats	4,308	1,397	32.4%	1,225	28.4%	2,622	60.9%
Oakland	5,966	1,473	24.7%	1,876	31.4%	3,349	56.1%
Shadyside	11,209	3,834	34.2%	5,627	50.2%	9,460	84.4%
Squirrel Hill	5,754	1,536	26.7%	3,343	58.1%	4,879	84.8%

Source: American Community Survey 2018 5-Year Estimates

Educational Attainment | Population Over 25 Years Old | Oakland and Other Innovation Neighborhoods 2019

	Population Over 25 Yrs Old				Bachelor's or Higher		
	Total Pop 25+	Bachelor's	Graduate/Prof Degree	Bachelor's or Higher	Bachelor's or Higher		
University City–Philadelphia	6,558	2,059	31.4%	2,669	40.7%	4,728	72.1%
Kendall Square–Boston	6,150	1,888	30.7%	3,370	54.8%	5,258	85.5%
Midtown–Atlanta	14,017	5,438	38.8%	5,760	41.1%	11,200	79.9%
Oakland*	5,966	1,473	24.7%	1,876	31.4%	3,349	56.1%

* Oakland data is 2018 5-year estimate

Source: Non-Oakland data ESRI 2019 estimates; American Community Survey 2018 5-Year Estimates

In the other innovation neighborhoods evaluated, over 70% of district residents have a Bachelor's degree or higher. This data suggests that Oakland is not as attractive a place to live for people with high educational attainment, compared to other innovation neighborhoods.

Oakland is a center of learning for over 44,000 undergraduate, graduate, and medical students.

The University of Pittsburgh's student population accounts for 64% of all of Oakland's full-time equivalent students. The 1,042 students at the School of Medicine are included in the University of Pittsburgh total. The number of full-time equivalent students at the Oakland Campus has increased by just 2% over the last seven years.

Graduate students now outnumber undergraduates at Carnegie Mellon. Carnegie Mellon's enrollment has increased significantly since 2010, growing by 30% or over 3,200 more students. The majority of this growth was in graduate students. Over the same time period, Pitt decreased graduate enrollment by 554.

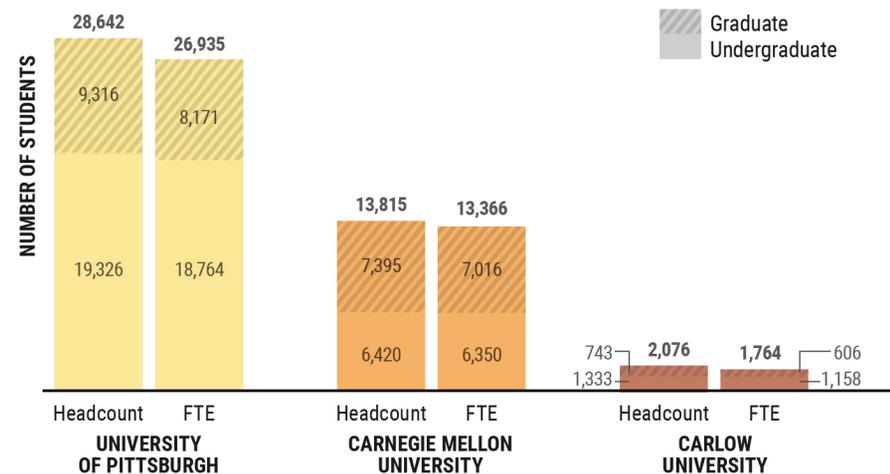
After this period of growth, both Pitt and Carnegie Mellon are planning for a consistent student population. Carlow University is a smaller institution of less than 2,000 students. Enrollment declined by almost 500 students from 2010-2017. According to their Institutional Master Plan (IMP), Carlow is actively seeking to grow enrollment back to 2010 levels.

Oakland also hosts approximately 2,000 pre-K-12 and lifelong learning students over the course of the year.

There are five private schools and one public school serving early childhood, elementary, middle, high school, and lifelong learning students.

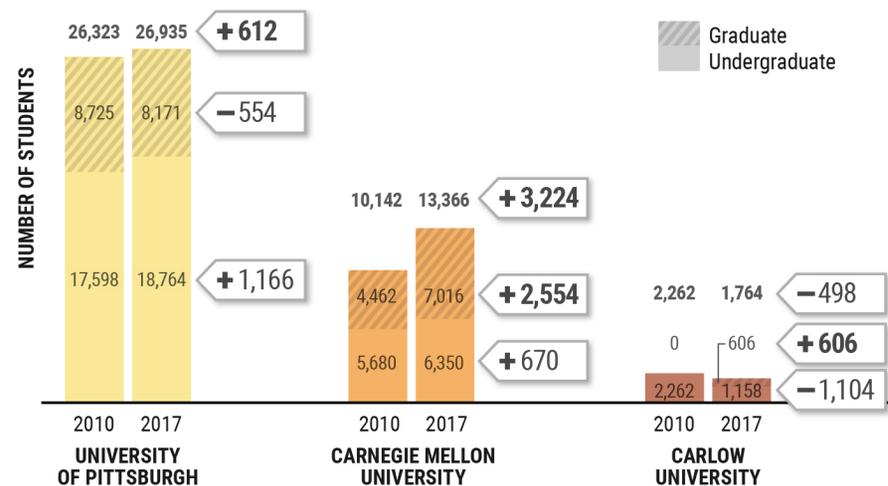
There are approximately 589 public school students in Oakland. There are a further 1,500 private school students in Oakland.

Higher Education Students in Oakland | 2017



*Includes the School of Medicine with 1,042 students and 965 FTE.
 Source: University of Pittsburgh, Office of Institutional Research, "2018 Fact Book"; Carnegie Mellon University, "University Factbook 2017-2018"; Carlow University website.

Trends in Student Enrollment (FTE) | 2010-2017



Source: University of Pittsburgh, Office of Institutional Research, "2018 Fact Book" and "2011 Fact Book"; Carnegie Mellon University, "University Factbook 2017-2018" and "University Factbook 2010-2011"

Educational Institutions

K-12 SCHOOLS

Private Schools

- 1** *The Campus Laboratory School of Carlow University (Grades 0–8; 234 students)*
- 2** *Fanny Edel Falk Laboratory School (Grades K–8; 429 students)*
- 3** *Western Pennsylvania Institute for the Blind Children (Grades 0–Adult; 200 students)*
- 4** *Oakland Catholic High School (Grades 9–12; 555 students)*
- 5** *Central Catholic High School (Grades 9–12; 840 students)*

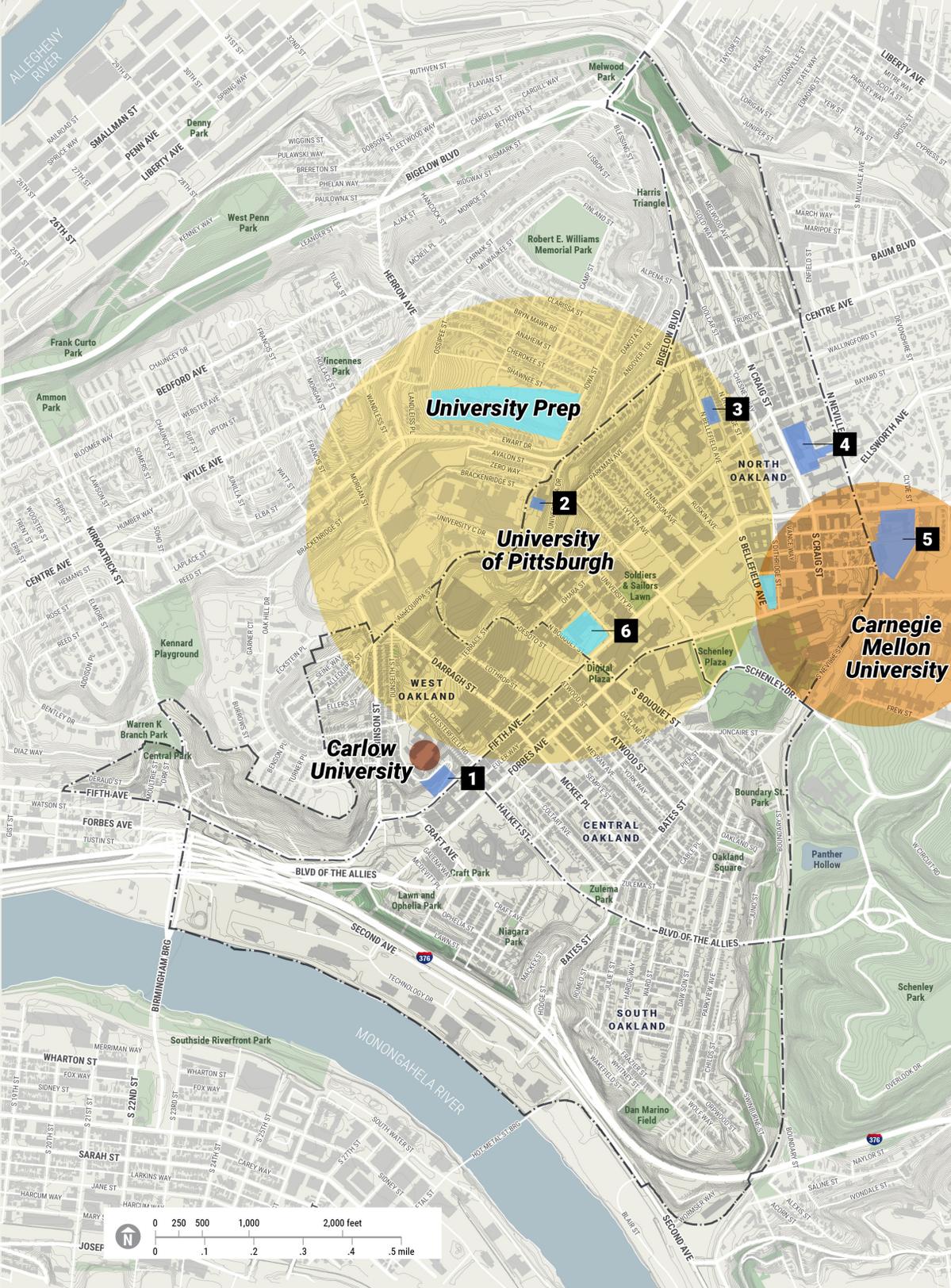
Public Schools

- 6** *Pittsburgh Science & Technology Academy (Grades 6–12; 589 students)*

HIGHER EDUCATION

- Carlow University (1,764 FTE students)**
- Carnegie Mellon University (14,058 FTE students)**
- University of Pittsburgh (26,935 FTE students)**

Source: Private and Public Schools (208), Allegheny County.



INNOVATION NEIGHBORHOODS

OAKLAND-PITTSBURGH



Population	19,964
Employees	48,625
Size (Sq Mile)	1.5

Pittsburgh's Oakland is composed of four city-designated areas: West Oakland, North Oakland, Central Oakland and South Oakland. The neighborhood these four areas form possesses

an unparalleled combination of academic, medical, and cultural institutions surrounded by a vibrant residential community. Oakland's academic institutions are also major employers and generators of economic activity throughout Western Pennsylvania, including the University of Pittsburgh, Carnegie Mellon University, the University of Pittsburgh Medical Center, and Carlow University. Oakland has an extraordinary complement of cultural institutions including the Carnegie Museum of Art, Carnegie Museum of Natural History, Carnegie Hall, the main branch of the Carnegie Library, and the nearby Phipps Conservatory. Activity extends to the riverfront portions of Oakland, where the Pittsburgh Technology Center continues to grow and add office and R&D buildings as well as parking, hospitality and other uses.

The University of Pittsburgh is one the country's top research universities with \$750 million in federal research grants alone. Carnegie Mellon University has long been an international leader in computer science and robotics with research centers, institutes and spinoff companies located throughout the city. The endowments of these two universities alone total \$5 billion.

A 2017 Brookings Institute report highlighted the potential for Oakland to become a global innovation hub, while also recognizing the many issues to be addressed before that potential can be realized and before it would lead to widespread workforce benefits for Pittsburgh.

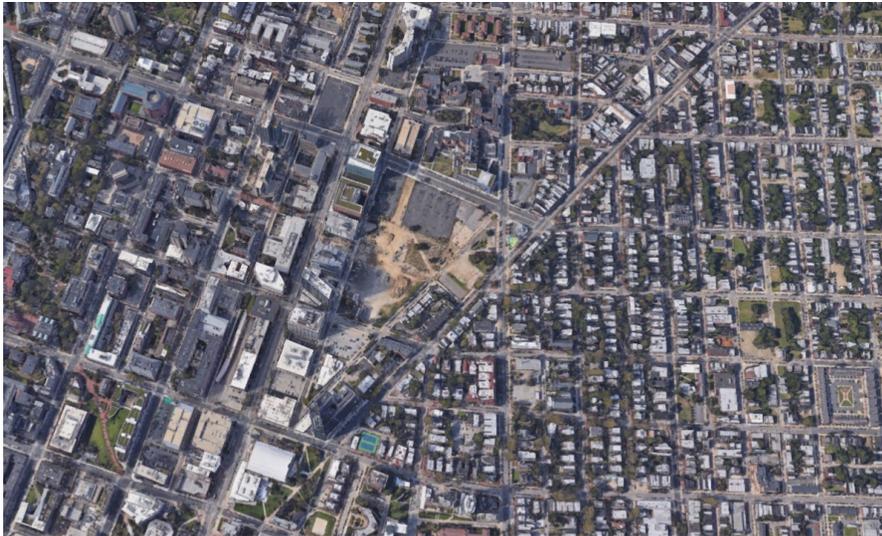
Oakland has always been home to multiple residential communities providing housing for a diverse group of Pittsburghers. Recent discussions in Oakland have revealed an alignment between the universities, healthcare providers, and the residential community around increasing the district's supply of affordable housing for long-term residents including faculty and staff, as well as students. Oakland could also benefit from lessons learned from districts in other cities where highly productive district governance has resulted in pooling resources and focusing them on investments with collective benefits.



PHOTO COURTESY OF THE UNIVERSITY OF PITTSBURGH

INNOVATION NEIGHBORHOODS

UNIVERSITY CITY-PHILADELPHIA



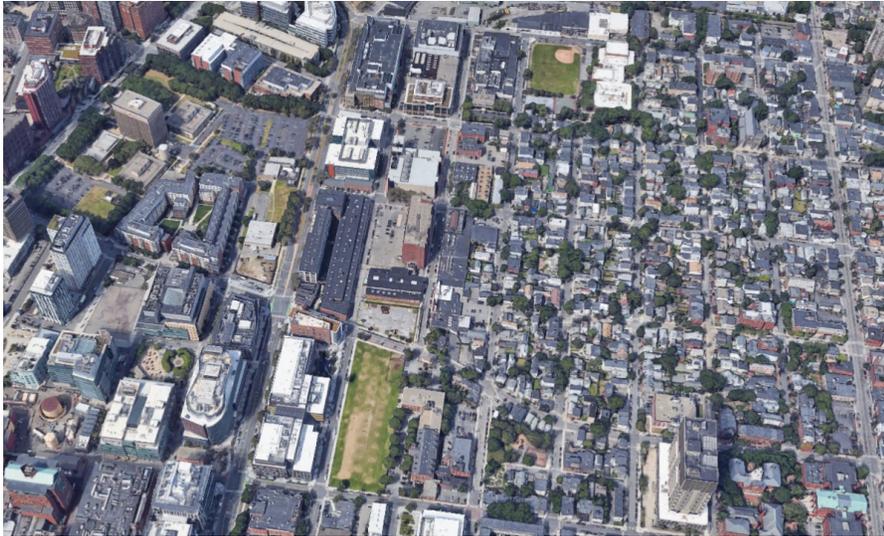
Population	25,065
Employees	85,000
Size (Sq Mile)	1.16

University City hosts major educational and medical institutions, including University of Pennsylvania, University of Pennsylvania Medicine and Hospitals, Drexel University, Wistar Institute, Children's Hospital of Philadelphia, University City Science Center (UCSC), and University of the Sciences. UCSC, a collaboration among the neighboring institutions, is both a real estate and programmatic entity focused on commercializing promising technology and cultivating talent. It has a substantial community engagement and youth engagement component. It administers and maintains 16 buildings and 27 acres of land, including several public parks. Population density is approximately 34 people per acre. 71% of the population is under 24 years of age. Less than 1% of the population are children. University City has 3 farmers markets and more than 40 cultural organizations call the area home.

University City is seeing expansion through redevelopment of lower scale buildings and increased vertical, denser development. Recent major developments have included the Schulykill Yards, a major redevelopment of the rail yard, and uCity Square, a joint development by Wexford, Ventas, and UCSC including office, lab, and innovation space. One of the keys to University City is the presence of 30th Street station which serves as a subway hub and provides access to regional commuter rail and Amtrak.

INNOVATION NEIGHBORHOODS

KENDALL SQUARE-CAMBRIDGE



Population	11,857
Employees	50,000
Size (Sq Mile)	0.7

Kendall Square is adjacent to the Massachusetts Institute of Technology (MIT) campus. It was formerly an industrial area, and has been planned for as an innovation and technology center since

the 1950s. In 2003, Novartis moved its global research headquarters to Kendall Square launching a new phase of intensified redevelopment driven by large corporate research centers. Kendall Square is located around a Massachusetts Bay Transportation Authority (MBTA) Red Line subway station, which connects to Harvard University and downtown Boston. The Red Line has the highest ridership of all subway lines in Boston.

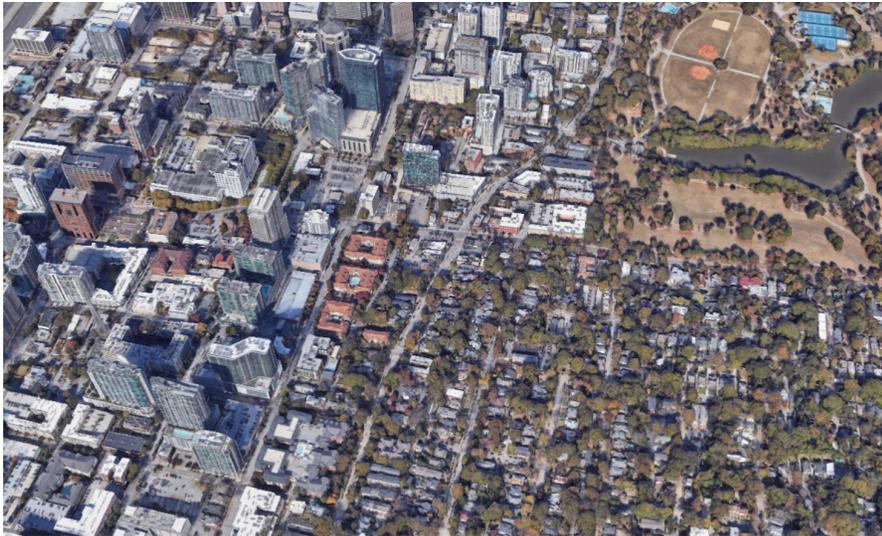
Kendall Square has a population density of 26 people/acre. 43% of the population is college age. About 5% of the population are children. There are long-established residential neighborhoods adjacent to Kendall Square. Kendall Square's few cultural amenities are primarily those housed by MIT.

In 2008, the City of Cambridge and MIT began planning to activate Kendall Square as a live-work-play district. Housing, restaurants and new streetscapes were added to the Kendall Square area helping transform it from an institutional/corporate tech park to a 24/7 neighborhood. The last major update the Kendall Square Urban Renewal Plan called for more than 5 million sf of development including 400,000 sf of housing, and 150,000 sf of public space in a variety of forms.



INNOVATION NEIGHBORHOODS

MIDTOWN-ATLANTA



Population	16,605
Employees	65,000
Size (Sq Mile)	0.9

Midtown Tech Square sits within the Midtown section of Atlanta. The exact boundaries are nebulous and blend with the commercial district of Midtown. Midtown historically consisted of 5 discreet traditional neighborhoods with Tech Square becoming the 6th. Midtown sits along the north south spine of Atlanta with direct links to Downtown and Buckhead by Peachtree St and Interstate 85. It also has 3 Metropolitan Atlanta Rapid Transit Authority (MARTA) train stops for the red and gold line, providing direct train access to the Hartfield Airport. The announcement of the Technology Square project by Georgia Tech in 2000 was a key catalyst for development. Another key aspect of development of Tech Square was the construction of 5th Street Plaza over Interstate 85 which created a direct connection between Georgia Tech and Midtown. Initial projects were built on vacant parking lots and included two substantial adaptive reuse projects. Major institutions in Tech Square include Emory University Hospital, and Georgia Tech. Several significant Georgia Tech research labs, and corporate innovation centers are located in Tech Square.

Midtown Tech Square has a population density of 29 people/acre. About 5% of the population is children. Midtown more broadly is home to significant elements of the city's cultural community. 8 major arts institutions call midtown home and the district abuts Piedmont Park, one of Atlanta's major parks. It is also connected to the Beltline trail system

Recent development has involved the replacement of 2-3 story buildings with taller and denser office buildings, student residences, apartments, lab spaces, and entrepreneurial launch spaces. In 2020, the development of two new towers, with Georgia Tech as a tenant, was announced.

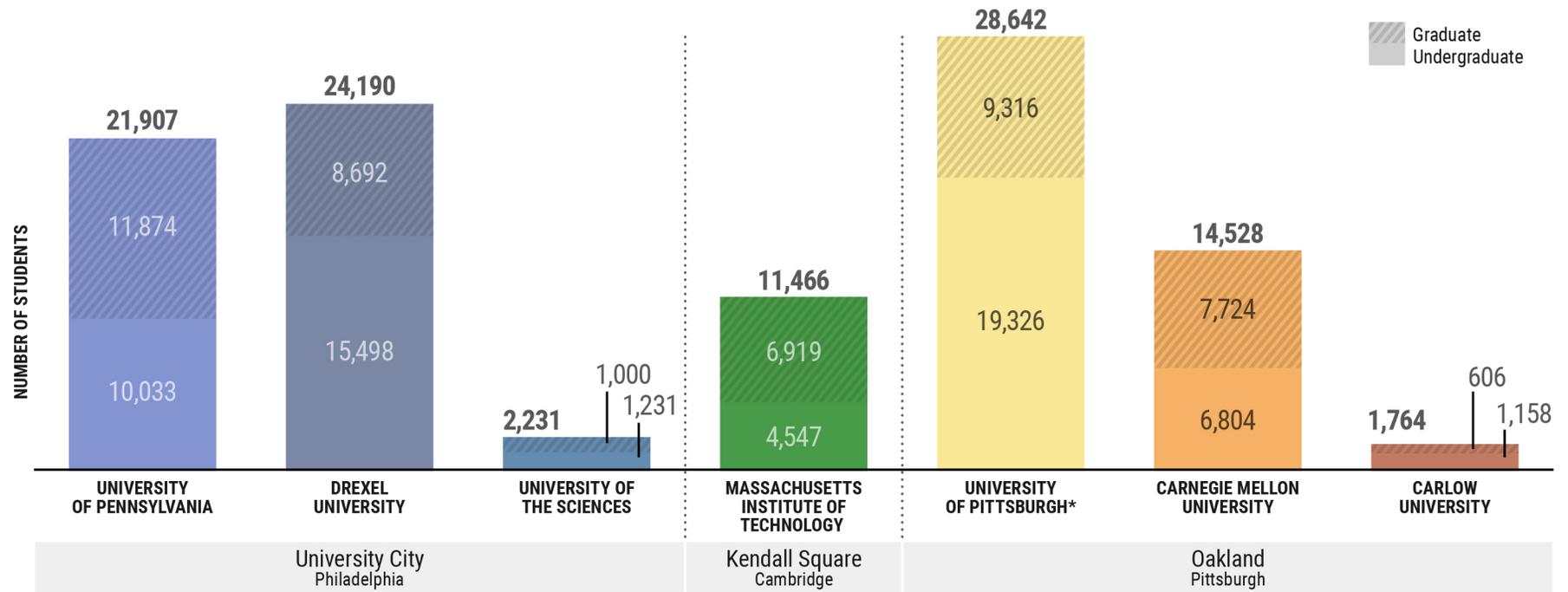


PHOTO COURTESY OF MIDTOWN ALLIANCE

Compared to National Innovation Neighborhoods

- The number of students in Oakland is comparable to the number of students in University City in Philadelphia.
- The Massachusetts Institute of Technology is the only university located in Kendall Square. Harvard University is nearby with 20,600 students enrolled in 2017.

Headcount Students in Oakland and National Innovation Neighborhoods | 2017



***Includes the School of Medicine with 1,042 students and 965 FTE.**

Source: University of Pittsburgh, Office of Institutional Research, "2018 Fact Book"; Carnegie Mellon University, "University Factbook 2017-2018"; Carlow University website; MIT Registrar's Office, "Statistics and Reports, 2017-2018"; Drexel University, "Common Data Set: 2017-2018"; University of Pennsylvania, "Common Dataset: 2017-2018"; University of the Sciences website.

There are 7,121 households in Oakland.

A household includes all the persons who occupy a housing unit as their usual place of residence, whether a family or a group of a roommates. People who live in housing units (a house, an apartment, mobile home or rented rooms) are classified as households by the Census.

Those who do not live in a housing unit are classified as persons living in group quarters. Types of group quarters include institutional facilities (correctional facilities, nursing homes, mental hospitals) and non-institutional facilities like dormitories, military barracks, groups homes, and missions. Approximately 31% of Oakland's population lived in group quarters in 2018. More than likely these are students living in dormitories.

The number of households in Oakland declined from 2000 to 2018, reflecting the decline in population from 2010 to 2018. Most of the loss of households occurred in Central and North Oakland between 2010 and 2018.

Only 19% of Oakland households are family households. As would be expected given the University presence, Oakland households are mostly non-family and young households. Across the city overall, 43% of households are family households.

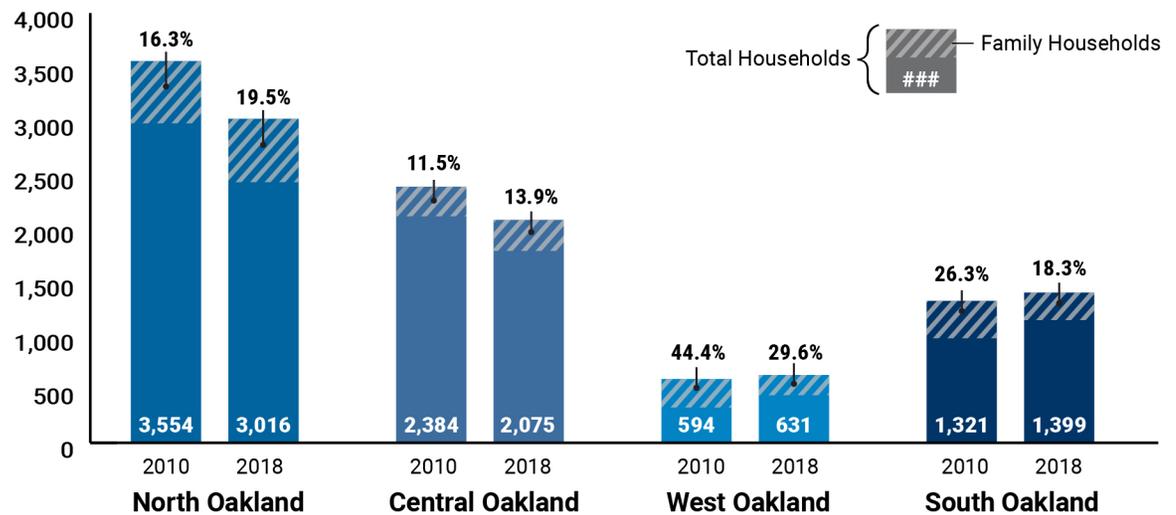
South and West Oakland lost a significant number of family households just between 2010 and 2018 – a drop of over 26% in South Oakland and over 29% in West Oakland, 168 units in total. Oakland overall saw a 10% drop in family

Household Trends | Oakland Neighborhoods | 2000, 2010, 2018



Source: U.S. Census 2000 and 2010; American Community Survey 2018 5-Year Estimates

Households and Family Households | Oakland Neighborhoods | 2010 and 2018



Source: 2010 Census; American Community Survey 2018 5-Year Estimate

households over the same period. The increase in the total number of households in West and South Oakland may reflect subdivision of family houses into apartments, as little new residential construction occurred over the time period. North Oakland and Central Oakland gained a small number of family households.

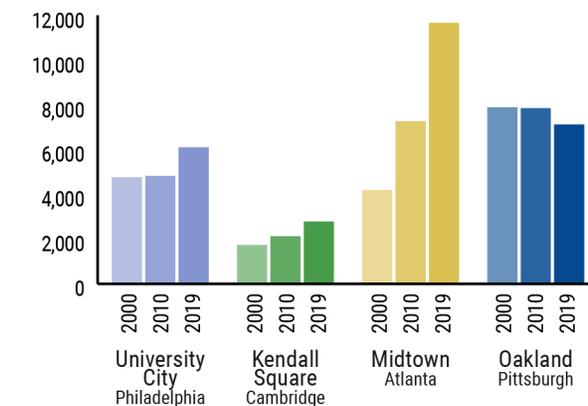
Oakland's household composition generally aligns with the City's in terms of household size. Oakland has slightly more 1-person households and less 3-person households as compared to the City. 60% of the households in North Oakland are 1-person households. Over 10% of Central Oakland's households contain 5 or more persons. 70% of these larger households live in Central Oakland.

Compared to National Innovation Neighborhoods

While the population of Midtown is only slightly higher than Oakland's, there are significantly more households in Midtown. Midtown Atlanta is a mixed use area where there is ample new housing construction, and so residents may be more easily able to access housing units that let them live alone or in smaller households than sharing with roommates.

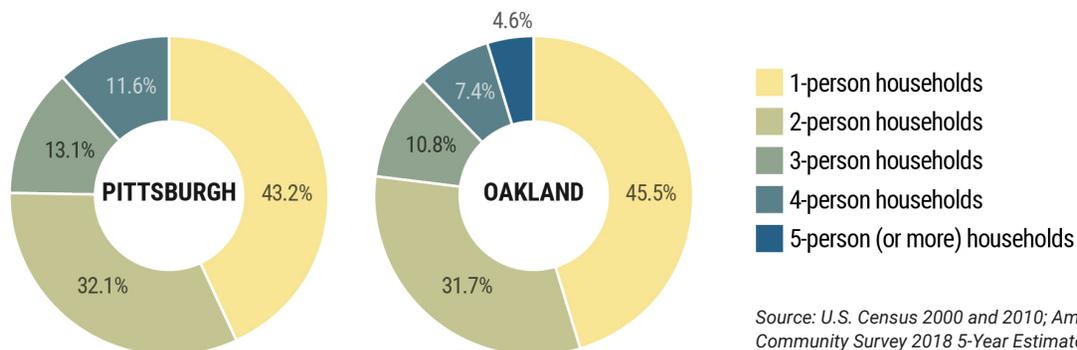
The number of households in Oakland is comparable to University City, another student-centered district.

Household Trends | Oakland and Other Innovation Neighborhoods | 2000, 2010, 2018



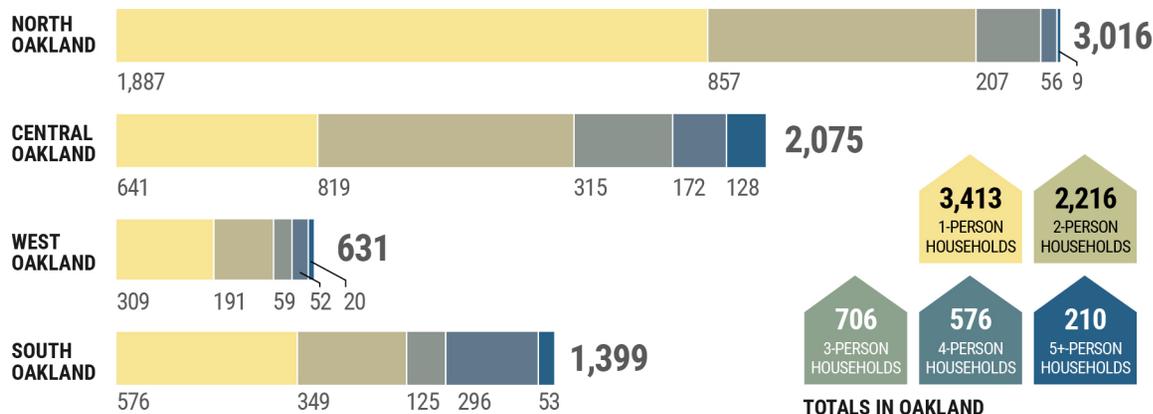
Source: U.S. Census 2000 and 2010; American Community Survey 2018 5-Year Estimates

Households by Household Size Pittsburgh and Oakland, 2018



Source: U.S. Census 2000 and 2010; American Community Survey 2018 5-Year Estimates

Households by Household Size Oakland Neighborhoods, 2018



Source: U.S. Census 2000 and 2010; American Community Survey 2018 5-Year Estimates

Overall, more of Oakland's population identifies as Asian and/or white and less of Oakland's population identifies as Black than the city overall.

Oakland's areas are quite different in terms of their racial composition. All of this data relies on self-reported Census data on racial identity. Central Oakland is the most homogeneous. Over 80% of the resident population identifies as white. West Oakland is the most diverse racially with almost half of the residents identifying as non-white.

The population of residents who identify as Black has been declining across all Oakland neighborhoods.

The number of residents that identify as Black has been declining in all areas, particularly in West Oakland.

The number of residents that identify as Asian has grown in all areas except Central Oakland. North Oakland has seen the greatest growth in residents who identify as Asian since 2000.

There are students from over 100 countries studying in Oakland.

Based on 2019 enrollment, there are over 3,000 international students at the University of Pittsburgh and over 850 employees with international citizenship.

Population by Race and Ethnicity | Oakland Neighborhoods | 2018

	North Oakland		Central Oakland		West Oakland		South Oakland	
	#	%	#	%	#	%	#	%
One Race								
White	6,565	70.2%	4,784	87.0%	778	45.7%	2,462	72.3%
Black	807	8.6%	191	3.5%	627	36.8%	554	16.3%
Asian	1,689	18.1%	334	6.1%	194	11.4%	142	4.2%
American Indian, Pacific Islander, Other	50	0.5%	50	0.9%	30	1.8%	43	1.3%
2 or More races	246	2.6%	139	2.5%	74	4.3%	205	6.0%
Hispanic	199	2.1%	152	2.8%	59	3.5%	107	3.1%

Source: American Community Survey 2018 5-Year Estimate

Population by Race and Ethnicity | Pittsburgh and Oakland | 2018

	Pittsburgh	Oakland
One Race		
White	66.9%	73.1%
Black	23.2%	10.9%
Asian	5.7%	11.8%
American Indian, Pacific Islander, Other	0.8%	0.9%
2 or More races	3.5%	3.3%
Hispanic	3.0%	2.6%

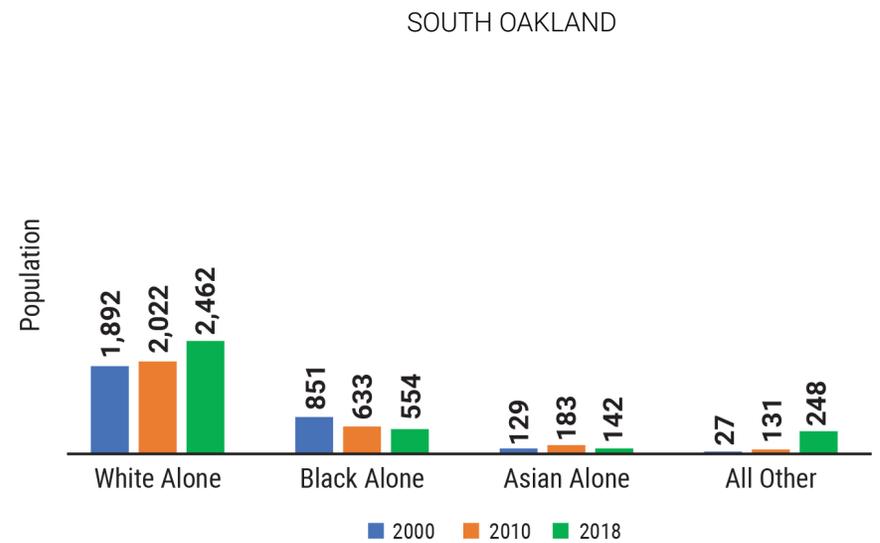
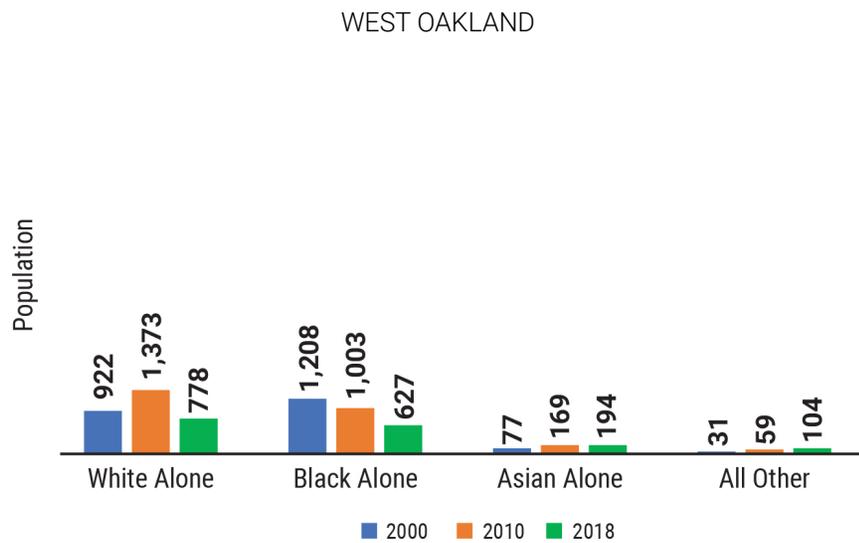
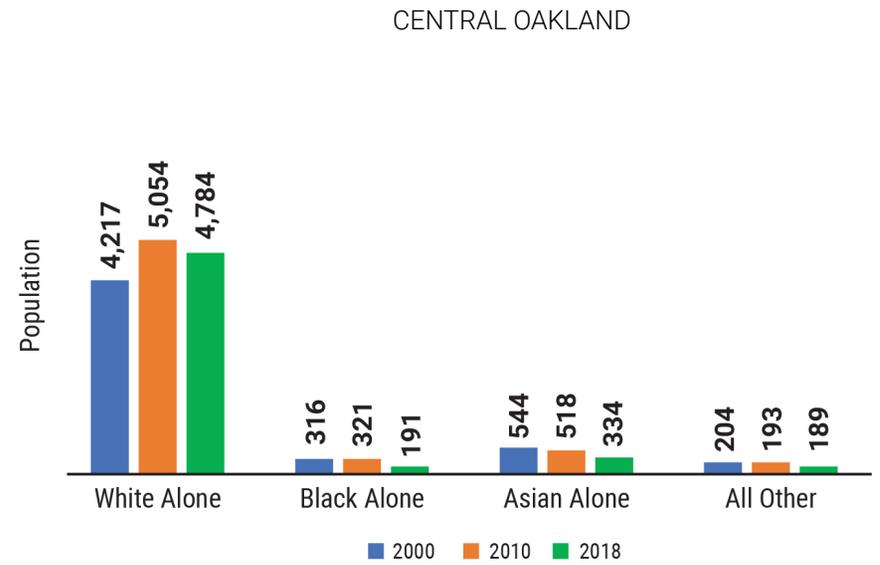
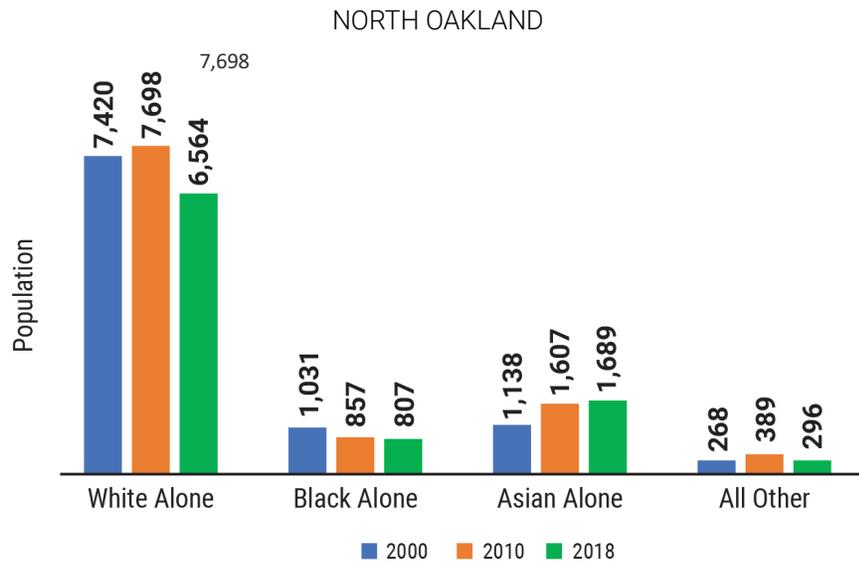
Source: American Community Survey 2018 5-Year Estimate

POINTS OF DISCUSSION

Oakland's student population comes from over 100 countries throughout the world. How can Oakland provide opportunities for them to stay and feel welcome?

What can be done to retain and grow Oakland's Black population?

Race Over Time



Oakland has a higher share of very low-income households than the city overall.

In middle income ranges, a smaller share of Oakland households earn \$50,000-\$150,000 than in the city overall.

Over 40% of Oakland's households have incomes of less than \$15,000 per year.

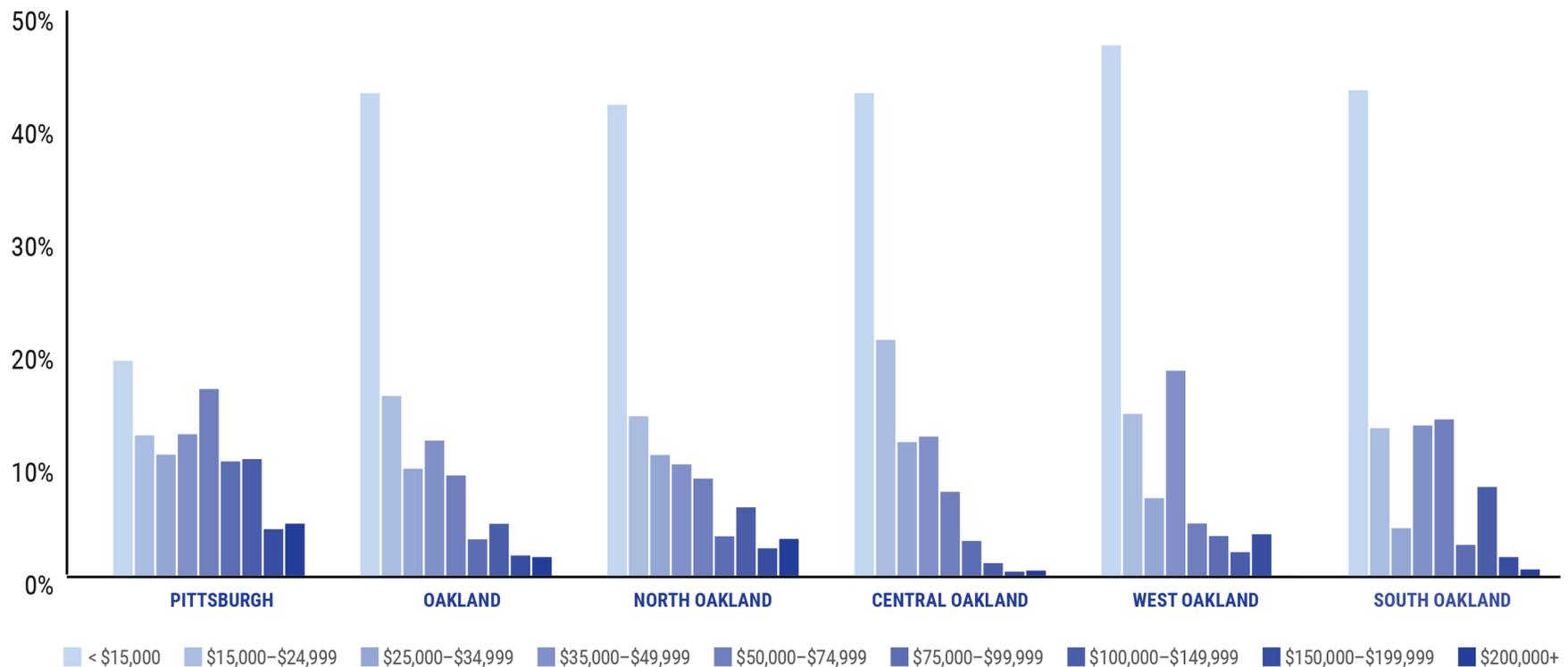
South Oakland is the most diversified in terms of income among Oakland's areas.

West Oakland has the highest concentration of low-income households, but also has a greater

relative share of middle income households earning \$35,000-\$49,000.

North Oakland has the highest percentage of higher income households. There are comparatively few of the highest income households in South and Central Oakland comparatively.

Household Income Distribution, 2017



Source: American Community Survey 2018 5 Year Estimates

Compared to the City overall, Oakland has relatively few households headed by someone of prime working age (25-64 years old) and more low income households.

Households under 25 and over age 65 may earn less because they are more likely to be enrolled as full-time students or retired on a fixed income. In Oakland, almost 3/4 of households earning less than \$25,000 are headed by someone either 65+ or 15-24. The majority of households headed by someone 15-24 or 65+ earn less than \$25,000 a year. This is likely a significant effect on Oakland’s household income.

Oakland also has comparatively fewer households earning the highest incomes than the City overall.

One of the important implications of Oakland’s demography is that the relatively low incomes of the student population and many older households make it more difficult to sustain an amenity base dependent on disposable income. This is reflected in the current mix of retail and dining options available in Oakland.

Income by the Age of the Head of the Household | City of Pittsburgh | 2019

City of Pittsburgh

Householder Age	15-24			25-34			35-54			55-64			65+			Total	
	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of HH
< \$25,000	6,169	14.7%	47.8%	6,589	15.7%	17.9%	7,453	17.7%	19.5%	6,596	15.7%	27.9%	15,191	36.2%	42.4%	41,998	30.1%
\$25,000–\$49,999	3,314	10.5%	25.7%	6,953	22.0%	16.1%	7,231	22.9%	18.9%	4,524	14.3%	19.2%	9,514	30.2%	26.5%	31,536	22.6%
\$50,000–\$99,999	2,316	6.2%	18.0%	8,483	22.7%	18.8%	12,152	32.5%	31.8%	7,519	20.1%	31.8%	6,944	18.6%	19.4%	37,414	26.8%
\$100,000–\$199,999	835	4.0%	6.5%	5,336	25.7%	24.2%	8,103	39.1%	21.2%	3,465	16.7%	14.7%	3,006	14.5%	8.4%	20,745	14.9%
\$200,000+	260	3.4%	2.0%	1,521	19.8%	23.0%	3,229	42.0%	8.5%	1,506	19.6%	6.4%	1,180	15.3%	3.3%	7,696	5.5%
TOTAL	12,894	9.3%	100.0%	28,882	20.7%	100.0%	38,168	27.4%	100.0%	23,610	16.9%	100.0%	35,835	25.7%	100.0%	139,389	100.0%

Source: ESRI

ESRI estimates income by the age of a head of the household, to better understand how young, and thus likely student, households affect the analysis of household income. This data is not available from the American Community Survey Estimates. Because this is a 2019 estimate, the total household count is different than the ACS 2018 5-Year Estimate and should not be compared directly to ACS-based analysis.

Income by the Age of the Head of the Household | Oakland | 2019

Oakland

Householder Age	15-24			25-34			35-54			55-64			65+			Total	
	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of HH
< \$25,000	2,395	54.9%	65.2%	496	11.4%	39.5%	329	7.5%	40.9%	299	6.9%	46.3%	843	19.3%	51.6%	4,362	54.4%
\$25,000–\$49,999	787	45.7%	21.4%	302	17.5%	24.0%	178	10.3%	22.1%	116	6.7%	18.0%	340	19.7%	20.8%	1,723	21.5%
\$50,000–\$99,999	312	27.9%	8.5%	254	22.7%	20.2%	151	13.5%	18.8%	134	12.0%	20.7%	267	23.9%	16.4%	1,118	14.0%
\$100,000–\$199,999	143	25.1%	3.9%	139	24.4%	11.1%	100	17.6%	12.4%	65	11.4%	10.1%	122	21.4%	7.5%	569	7.1%
\$200,000+	36	15.0%	1.0%	65	27.1%	5.2%	46	19.2%	5.7%	32	13.3%	5.0%	61	25.4%	3.7%	240	3.0%
TOTAL	3,673	45.8%	100.0%	1,256	15.7%	100.0%	804	10.0%	100.0%	646	8.1%	100.0%	1,633	20.3%	100.0%	8,012	100.0%

Source: ESRI

The majority of households headed by someone 15-24 or 65+ earn less than \$25,000 a year.

Compared to National Innovation Neighborhoods: Focus on University City

Of the national innovation neighborhoods, University City has the closest population to Oakland for a more detailed breakdown of households.

University City has significantly more households headed by someone between the ages of 25 and 34 years old. Where approximately 34% of Oakland’s households are headed by someone of prime working age (25 to

64 years old), 45% of University City’s households are in this age bracket. University City also has a higher proportion of its households earning over \$100,000 per year; 14.6% compared to 10% for Oakland.

University City is similar to Oakland, in that as university districts with many students, over half of all households earning less than \$25,000 per year are young. In University City, young households are followed by 25-34 year old households in terms of the percentage earning less than \$25,000 per year. This may indicate the

presence of more graduate students and early career households in University City.

In Oakland, it is more likely that households headed by someone aged 65+ have lower incomes, indicating they may have aged in place. In University City the 65-plus age cohort represents 4% of households earning less than \$25,000 per year; there is a smaller and wealthier population of senior households than in Oakland.

Income by the Age of the Head of the Household | National Innovation Neighborhoods: University City | 2019

University City

Householder Age	15-24			25-34			35-54			55-64			65+			Total	
	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of Income Bracket	% of Age Cohort	#	% of HH
< \$25,000	1,970	55.8%	72.6%	1,009	28.6%	45.0%	286	8.1%	42.7%	117	3.3%	52.7%	146	4.1%	59.8%	3,528	57.9%
\$25,000–\$49,999	399	42.5%	14.7%	387	41.2%	17.3%	97	10.3%	14.5%	25	2.7%	11.3%	31	3.3%	12.7%	939	15.4%
\$50,000–\$99,999	166	22.6%	6.1%	397	54.2%	17.7%	106	14.5%	15.8%	31	4.2%	14.0%	33	4.5%	13.5%	733	12.0%
\$100,000–\$199,999	107	20.6%	3.9%	270	51.9%	12.0%	92	17.7%	13.7%	27	5.2%	12.2%	24	4.6%	9.8%	520	8.5%
\$200,000+	73	19.5%	2.7%	180	48.1%	8.0%	89	23.8%	13.3%	22	5.9%	9.9%	10	2.7%	4.1%	374	6.1%
TOTAL	2,715	44.6%	100%	2,243	36.8%	100%	670	11.0%	100%	222	3.6%	100%	244	4.0%	100.0%	6,094	100.0%

Source: ESRI

University City has fewer households headed by seniors in every income band.

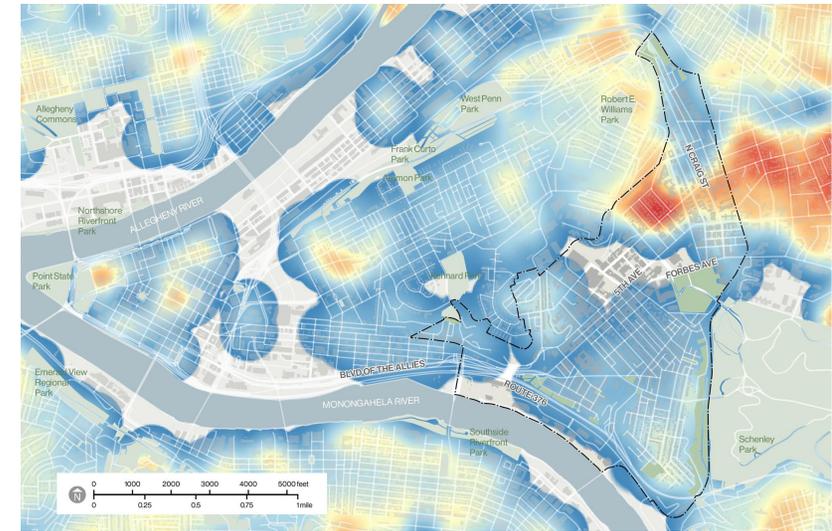
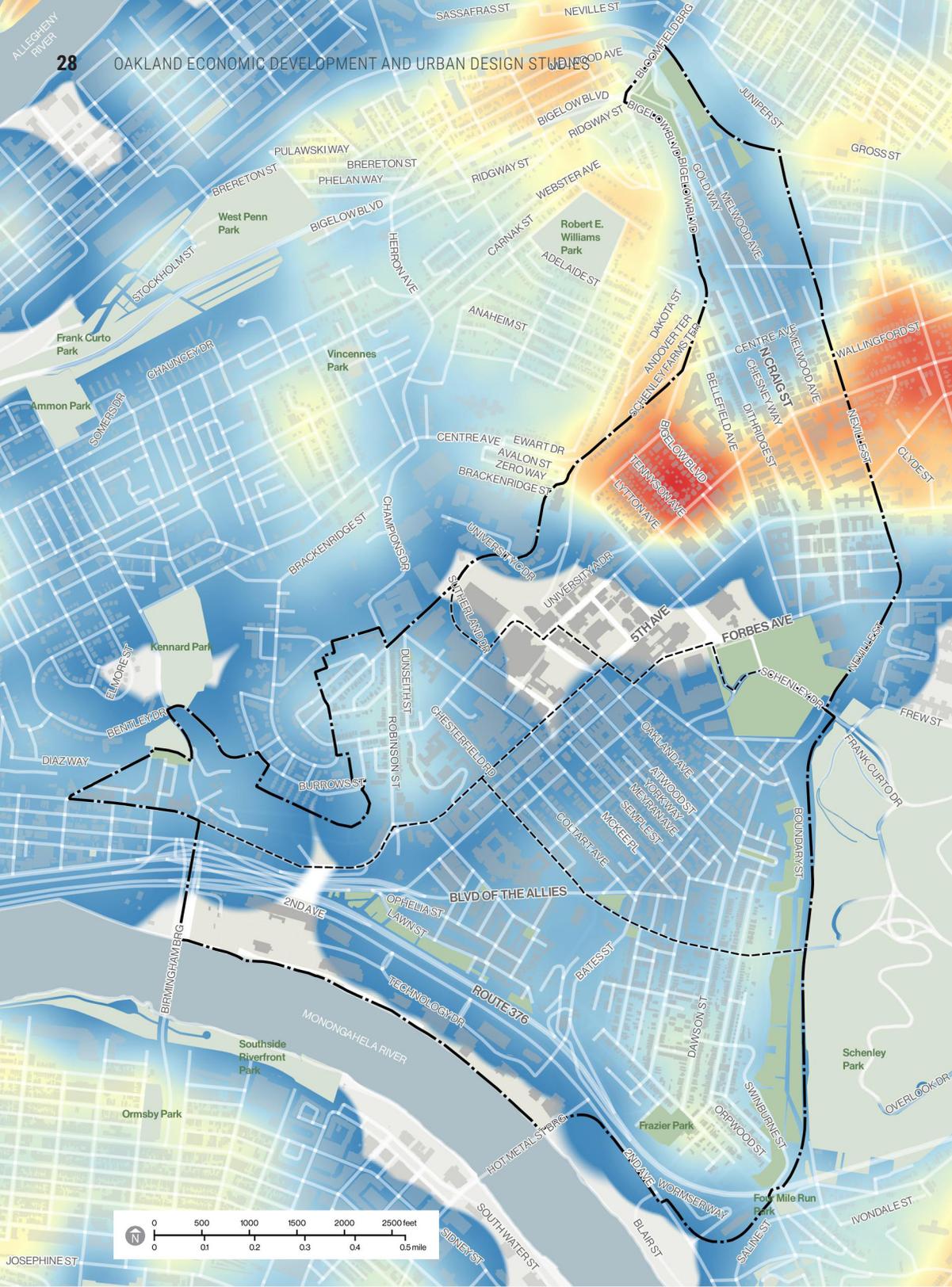
The racial breakdown of homeownership and rental tenure varies widely across Oakland neighborhoods.

- Two-thirds of the occupied housing units in Oakland are occupied by white households. Three-quarters of white households in Oakland rent.
- Fewer than a quarter of the occupied housing units in Oakland are owner-occupied. 73% of the owner-occupied housing units are owned by white households.
- 15% of the occupied housing units are occupied by Asian households. 84% of these households rent.
- 14% of the occupied housing units are occupied by black households. 78% of these households rent.
- Homeownership is the highest in North Oakland. Homeowners in North Oakland are predominantly white, although 15% are Asian. The population of renters in North Oakland is considerably more diverse, at 47% white, 19% black, and 31% Asian among others.
- West Oakland is among the most racially-diverse of Oakland’s areas. Two-thirds of the homeowners in West Oakland are black. 20% of renters are Asian. White households are less than one-third of all households, renter or homeowner, in West Oakland.
- A small share of housing units in Central Oakland are occupied by homeowners; those homeowners are predominantly white. Central Oakland’s renters are also predominantly white.
- South Oakland has approximately equal numbers of black households that rent and black households that are homeowners. Significantly more white households are renters in South Oakland than homeowners.

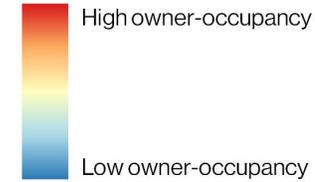
Occupied Housing Units by Race and Tenure

	Oakland			North Oakland			Central Oakland			West Oakland			South Oakland		
	% of all units	% of owned units	% of rented units	% of all units	% of owned units	% of rented units	% of all units	% of owned units	% of rented units	% of all units	% of owned units	% of rented units	% of all units	% of owned units	% of rented units
White Alone	67.2%	73.2%	65.5%	57.9%	83.9%	47.3%	87.3%	90.0%	87.0%	27.7%	24.2%	28.9%	75.4%	58.6%	81.6%
Black Alone	13.8%	13.4%	13.9%	13.6%	0.0%	19.2%	2.2%	5.7%	1.8%	49.4%	66.2%	43.9%	15.2%	27.5%	10.6%
Asian Alone	15.4%	10.6%	16.8%	26.5%	14.9%	31.2%	5.5%	4.3%	5.6%	17.3%	9.6%	19.8%	5.1%	4.8%	5.3%
American Indian, Pacific Islander, Other	1.3%	1.3%	1.3%	0.4%	1.3%	0.0%	2.4%	0.0%	2.7%	2.1%	0.0%	2.7%	1.4%	2.9%	0.9%
2 or More Races	2.3%	1.4%	2.6%	1.6%	0.0%	2.3%	2.6%	0.0%	2.9%	3.5%	0.0%	4.6%	2.9%	6.1%	1.7%
TOTAL NUMBER	7,121	1,636	5,485	3,016	875	2,141	2,075	230	1,845	631	157	474	1,399	374	1,025

Source: American Community Survey 2015–2018



Owner-occupied Parcels Percentage Heatmap



Data Sources

Allegheny County Property Assessments

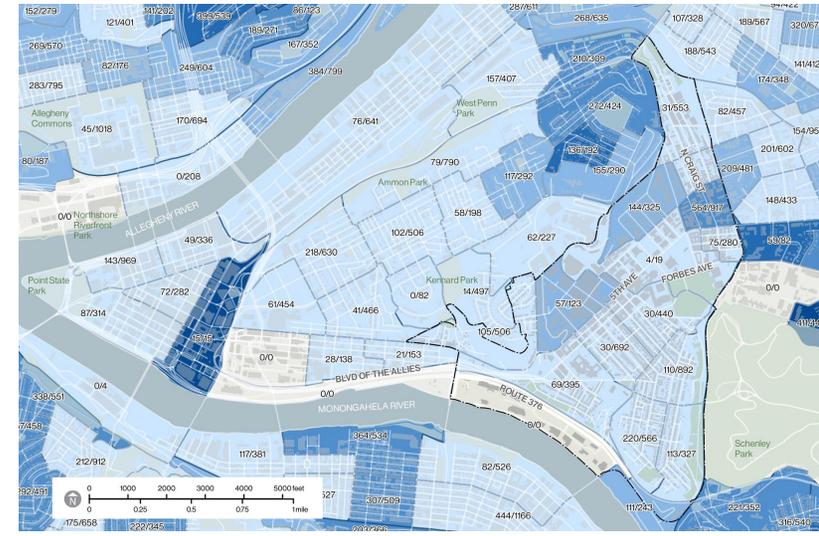
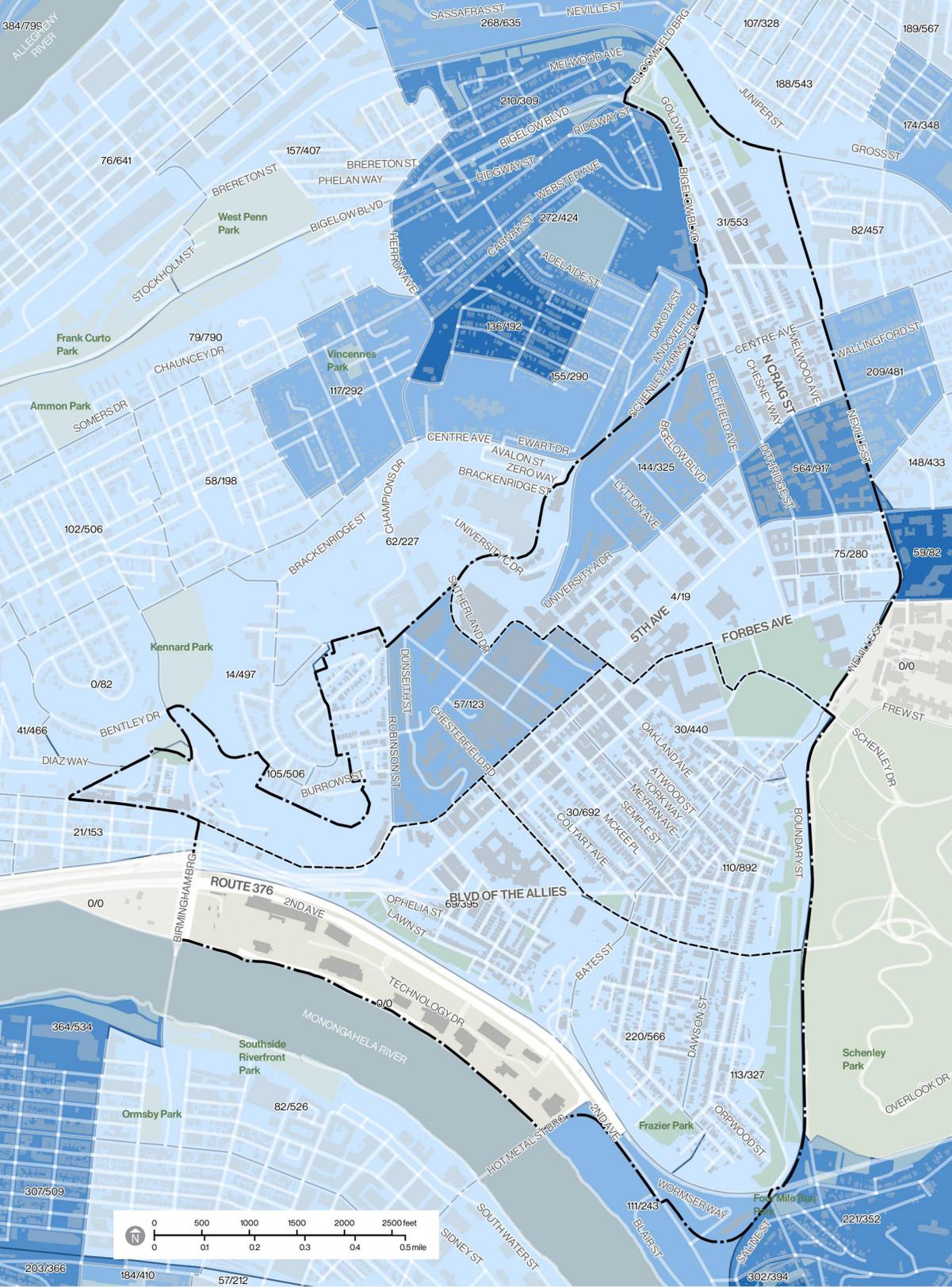
Property assessment data was joined by parcel ID to the parcels shapefile, and a subset of the dataset was created which only included residential (including mixed-use) parcels.

The physical property address and the 'change notice address' listed in the property assessment data were compared, under the assumption that matching addresses would imply an owner-occupied parcel.

The number of parcels with matching addresses, as well total parcel count, were spatially aggregated by hex.

The aggregated values were divided to approximate the number of owner-occupied per hex.

A point layer was created from the hex centroids and visualized using heatmap symbology, weighted by the percentage of parcels within the hex with matching addresses (and thus are assumed to be owner-occupied).



**Owner-occupied Residential Units %
–ACS Percentage**

- 0%–20%
- 20%–40%
- 40%–60%
- 60%–80%
- 80%–100%

Data Sources
ACS 2015–2018

Oakland has areas of concentrated homeownership, but it is primarily a rental market focused on a high-turnover student population.

Using two different methods of measurement, Oakland has fewer than one-third of housing units occupied by homeowners. As mapped on page 47, American Community Survey estimates total homeownership levels across Oakland at approximately 1,700 housing units – or 24% of the total housing units in the neighborhood. This compares to approximately 48% homeowner occupancy in Pittsburgh overall.

A second strategy of measuring likely homeownership, by matching property tax records that were mailed to the same address, likely indicating that the owner lives in the unit, identified 1,322 parcels, or 27% of units, as owner-occupied.

Higher levels of homeownership exist in Oakland but are largely concentrated in pockets of North Oakland – as part of the Schenley Farms neighborhood and in a Census tract bound by Bellefield Avenue, Fifth Avenue, Neville Street, and Bayard Street where there are a number of significant condominium buildings. These areas are shown in the red/orange color scheme on the heat map. There are also slightly higher rates of homeownership in West and South Oakland than in Central Oakland.

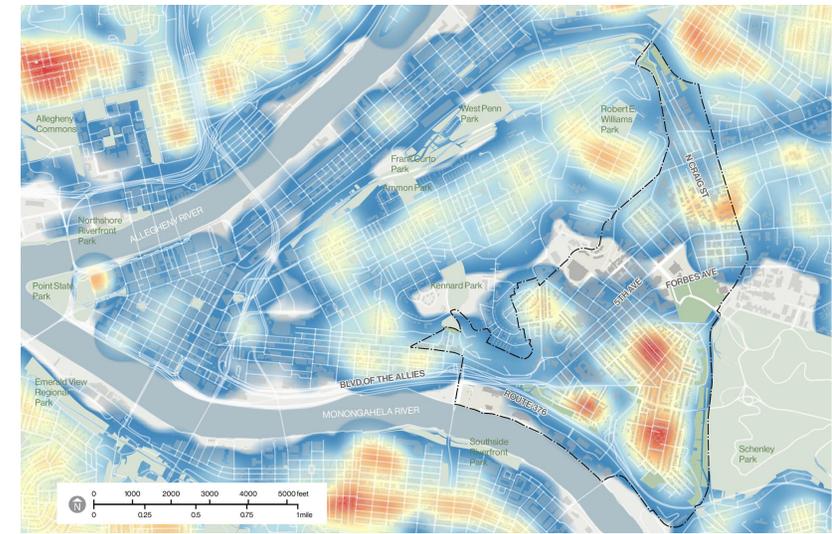
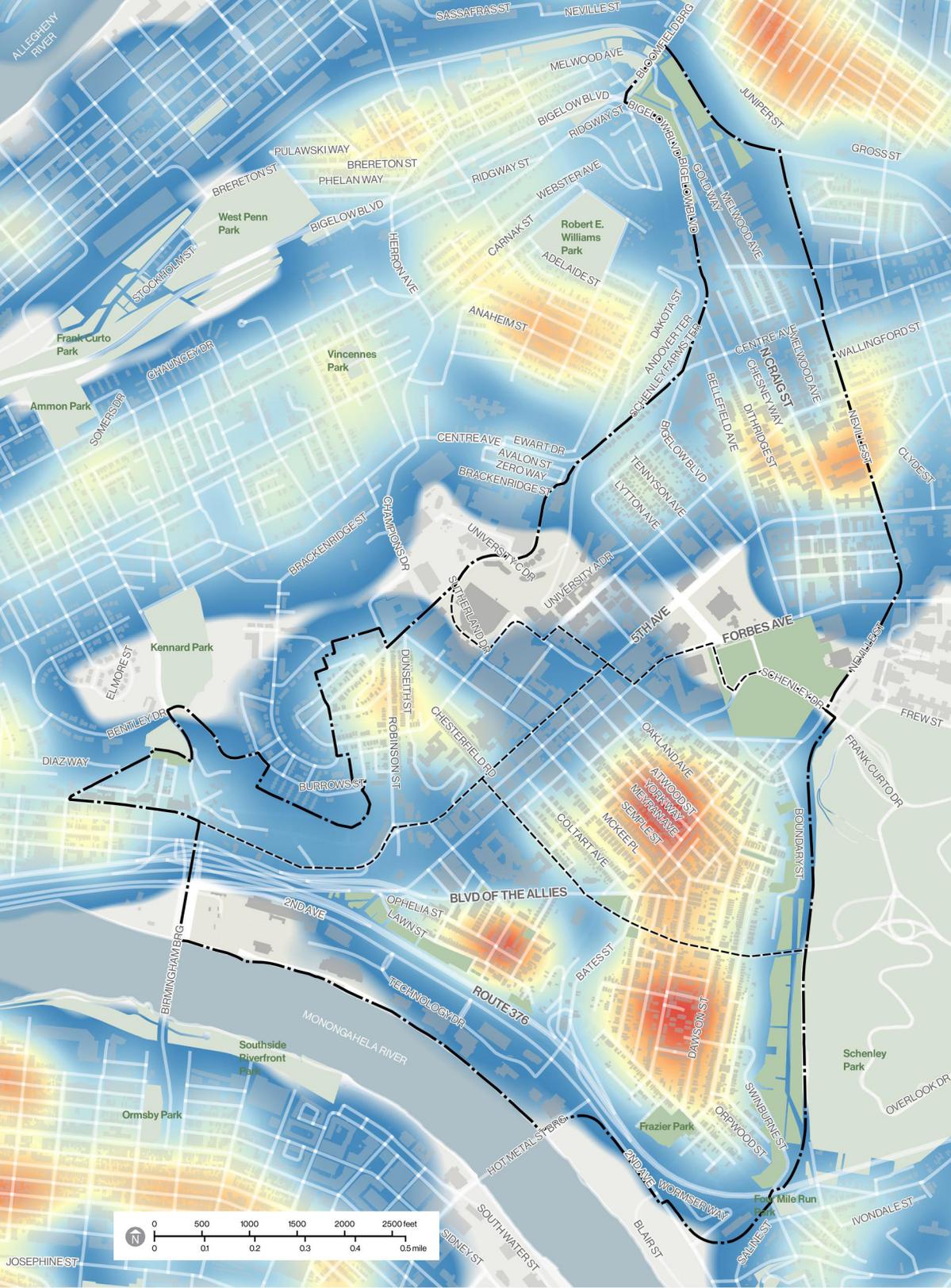
Most of the housing stock in Oakland is characterized as average to fair in condition.

Approximately 40% of the housing stock contains three or four bedrooms. There are over 230 properties that contain over seven bedrooms. There are more properties with five bedrooms, 475, than there are of either one-bedroom or two-bedroom properties, 432 and 268 respectively. 432 residential properties do not have data provided as part of the assessors files, and multi-family housing that is taxed as commercial property is not included in these totals. Overall, the breakdown of bedrooms is similar to the City of Pittsburgh overall.

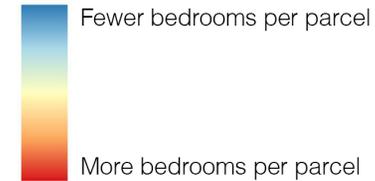
The housing stock may require substantial renovation and rehabilitation to serve a market broader than students. 86% of the total housing stock captured in the assessor's files is in average to fair condition. There are more properties in good, very good, or excellent condition total than there are in poor, very poor, and unsound condition. Six properties are estimated to be in unsound condition.

While the number of housing units and the physical form of residential properties is smaller in Central and South Oakland, they are some of Oakland's most dense areas in terms of bedrooms.

Student housing is typically rented per bedroom, which makes number of bedrooms an important measure of density in a student-dominated rental market. Bedroom density in South Oakland and Central Oakland is high. Most of Central Oakland has a substantial level of bedroom density, with nearly 3,000 bedrooms in the area.



Bedroom Density Heatmap



Data Sources

Allegheny County Property Assessments

The property assessment dataset has information on the number of bedrooms per parcel, though some large, multi-unit parcels (i.e. apartment buildings, college dormitories) did not have bedroom counts listed and may therefore be undercounted here.

The property assessment data was joined by parcel ID to the parcels shapefile, and the number of bedrooms per parcel was spatially aggregated to find the number of bedrooms per hex.

A point layer was created from the hex centroids and visualized using heatmap symbology, weighted by the number of bedrooms in each hex.

For rental properties, the most critical issue in Oakland is the relative lack of housing availability. Rents of multi-bedroom homes are comparatively high, likely because of students renting by the bedroom.

Based on a November 2019 snapshot of the rental market, only 26 units were available for rent. This is less than half of one percent of the total rental housing units in the neighborhood and less than 0.3% of the total housing units.

Such a low level of availability indicates a very tight housing market. The available units ranged in price from \$600-\$1285 for a one bedroom; \$830-\$3,500 for a two-bedroom, \$1,295-\$3,150 for a three-bedroom, \$2,000 for a four-bedroom, \$2,000-\$3,500 for a five-bedroom, and \$2,100-\$2,495 for a six-bedroom.

Approximately half of the units listed on the open rental market are affordable to households making 80% of Area Median Income (AMI).

The City of Pittsburgh Affordable Housing Task Force analyzes housing affordability based on households earning 30%, 50%, and 80% of AMI. The 2016 Affordable Housing Task Force report envisions establishing an affordable housing trust fund that would target 50% of funds to households earning at or below 30% AMI, 25% of funds to households earning at or below 50% AMI, and 25% of funds to households earning at or below 80% AMI. The report also envisions

Pittsburgh Income Limits (HUD) and Rents

Household Size	Extremely Low Income	Very Low Income	Low Income
	30% AMI Rent at 30%	50% AMI Rent @ 30%	80% AMI Rent @ 30%
1	\$420.00	\$700.00	\$1,118.75
2	\$480.00	\$800.00	\$1,278.75
3	\$540.00	\$900.00	\$1,438.75
4	\$643.75	\$998.75	\$1,597.50
5	\$754.25	\$1,078.75	\$1,726.25
6	\$864.75	\$1,158.75	\$1,853.75

that inclusionary housing should be targeted at households at or below 50% AMI for rental units and households at 80% AMI for homeownership.

Of the housing units listed as available at the time of the analysis, none of the units are affordable to very low income households earning 30% AMI or below. One unit listed at the time of this analysis is affordable to a 1 or 2 person households at 50% AMI; six units are affordable to a 1-2 person household at 80% AMI. Four units are affordable to a 3-4 person household at 80% AMI.

7 units are affordable to a 3 person household at 80% AMI; 9 units are affordable to a 4 person household at 80% AMI.