



BeauMonde Originals

Pedestrian Vitality: Momentum Continues to Build

Pedestrian activity in the core of Center City continued to increase during the last quarter of 2022 and into the first two weeks of January 2023, as the volume of residents, workers and visitors of all types downtown continued to grow. National studies suggest that those downtowns that are doing best have diverse land-uses, including substantial housing, a strong convention and tourism business, vibrant arts and culture institutions, diverse restaurants, a business mix not highly dependent on technology or financial services and a relatively short commute to work – well below the hour-long journey required pre-pandemic in many regions. These are all characteristics that define Center City Philadelphia. Within the Center City District (CCD) the public and private sectors working together have also made substantial strides in reducing crime and improving quality of life, though challenges remain.

The vitality on downtown sidewalks is created by three broad types of pedestrians: those who live in the core of Center City; those who commute to work from throughout the city and region; and those who come as tourists, visitors to cultural institutions, convention attendees or to shop, dine and access the variety of services available. Since 2020, the number of residents has steadily increased; others like tourists are seasonal; but many are discretionary, who can choose to shop or dine in many locations in the region, come to the office or work remotely.

Center City District uses two independent sources of data to track these trends. First, CCD has installed sensors at 11 locations within the commercial core of downtown from 8th to 19th Street and from JFK Boulevard to Walnut Street. Three of these sensors are located in the main office district, on the 1700 block of JFK Boulevard, and the 1600 and 1800 blocks of Market Street (Figure 1). Second, CCD uses Placer.ai estimates of the daily downtown population in a broader area from Vine Street to South Street, river to river. These estimates, which are based on mobile phone location data, are available for Center City residents, non-resident workers, and all other visitors.

Placer.ai data indicate that Center City's average daily population increased steadily from a low of 113,600 in April 2020 to 326,000 in December 2022, 76% of the pre-pandemic December 2019 level. Reflecting the steady stream of new housing development in the core of downtown and nearby neighborhoods, residents averaged 59,600 per day in December, exceeding the pre-pandemic level by 29%. Non-resident workers of all types, whose numbers declined most significantly in 2020, increased throughout 2022 to a daily average of 73,680 in December, 60% of the pre-pandemic level. Other visitors, including tourists, shoppers, and regional visitors, averaged 192,600, 74% of December 2019 levels.

While the numbers of residents, workers and visitors to the downtown all typically decline just after the December holiday shopping season and early into the new year, data for the first two weeks of January indicate continued momentum in 2023. The average daily population totaled 317,800 from January 1 to January 14, a 33% increase over the same two-week period in 2022, and 79% of the pre-pandemic (2020) level. The resident category increased by 15% from 2022, while non-resident workers increased 49%, and visitors were up 33%.

To focus specifically on office workers, as opposed to health care, education, retail and hospitality workers, CCD also does a sub-tabulation of Placer.ai data for an area designated the West Market-JFK Boulevard office district (outlined in Figure 1). In this zone, the average population of non-resident workers has increased steadily since the low point of just 2,500 in April 2020 (6% of the April 2019 level). In December 2022, this population averaged 13,000 per day, which represented 42% of the pre-pandemic, December 2019 (see Figures 2-7).

Data from the three CCD sensors located in the office district show a 25% increase in the average number of pedestrians from December 2021 to December 2022. The most significant increases have occurred on Tuesdays (42%), Wednesdays (44%), and Thursdays (32%). But even within the so-called office district, there is a significant number of apartment and condominium buildings and the number of these residents who were present downtown in December increased 4% over the prior year and 86% since 2019.

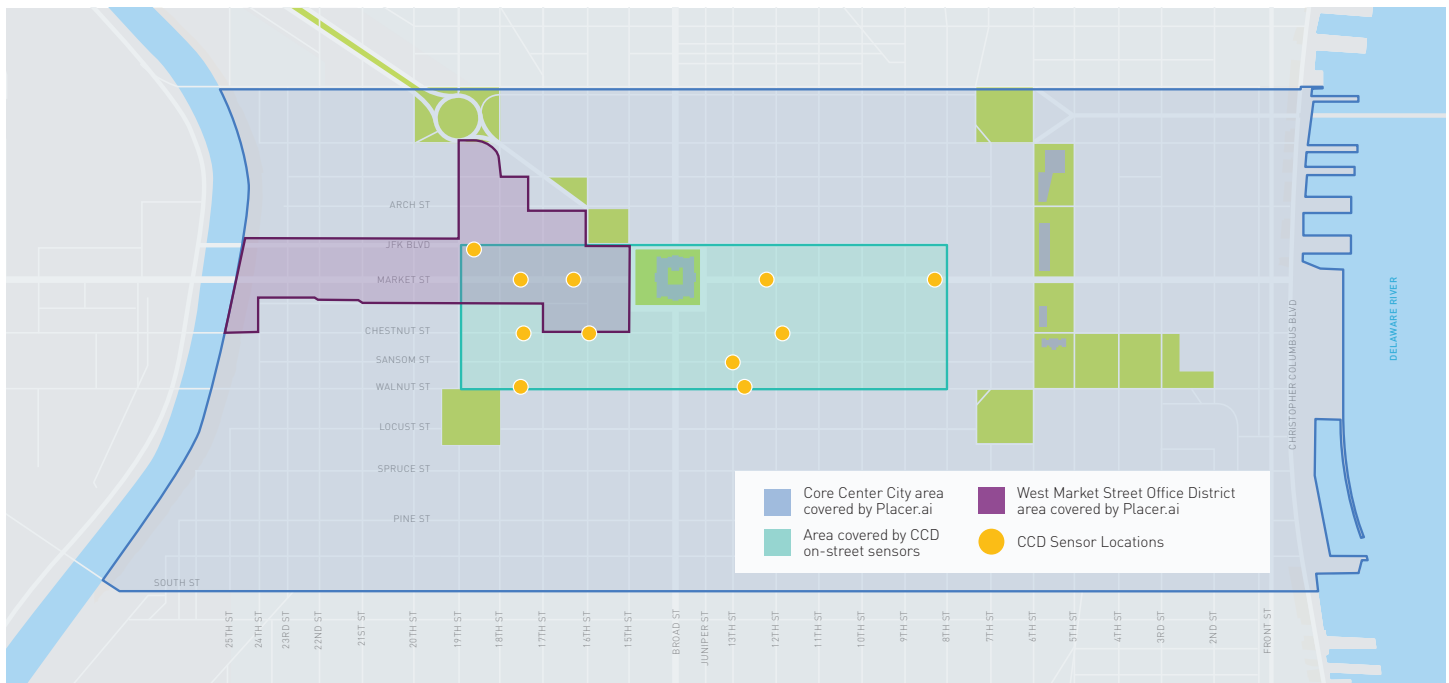
Philadelphia’s long and successful history of converting vacant office and industrial buildings, driven by the 10-year tax abatement for conversions, provides an important tool for our path forward to greater land-use diversification.

Another key indicator of recovery is SEPTA ridership. Weekly ridership averaged 2.8 million in December, a 10% decline from the prior month reflecting typical holiday season declines. Overall December ridership was down 1% year-over-year, but Regional Rail riders increased 18%, an indication of the strong recovery of downtown commuting.

December ridership was 49% of the February 2020 level for all modes, 55% for buses, 49% for trolleys, 44% for Regional Rail, and 41% for the Market-Frankford Line and Broad Street Line. It is important to qualify this data with the fact that SEPTA does not find that it has lost its volume of customers; what has declined is the frequency at which those customers use the system, largely a result of hybrid work patterns. So SEPTA’s opportunities for growth are based not only on the number of days workers may be on site for their jobs, but also on finding ways to design their system and schedules for a growing number of non-9-to-5 passengers.

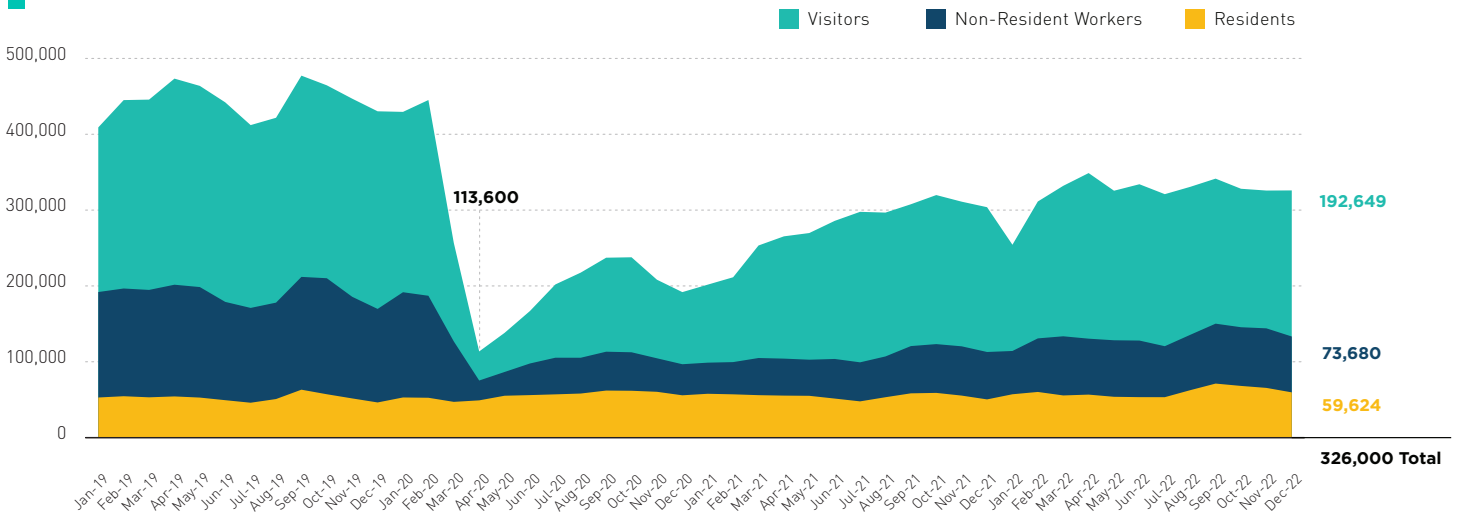
Ridership on the PATCO High Speed Line shows a similar pattern of recovery since 2020. Average weekly ridership declined 5% to 95,400 in December, although this is a normal seasonal pattern, largely reflecting declines in the final two weeks of the month. Ridership in the week ended December 10 was 111,400, a post-pandemic peak.

Figure 1:
Areas for Measuring Pedestrian Volumes



Source: Center City District Sensors

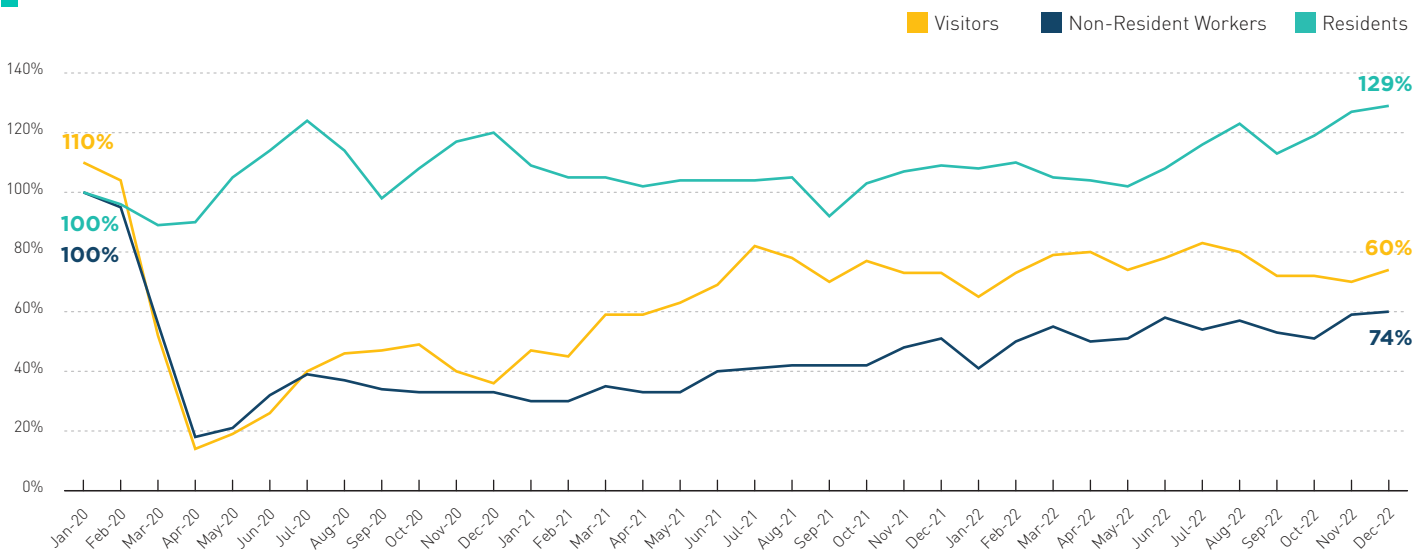
Figure 2:
Average Daily Visits to Core Center City



Source: Placer.ai

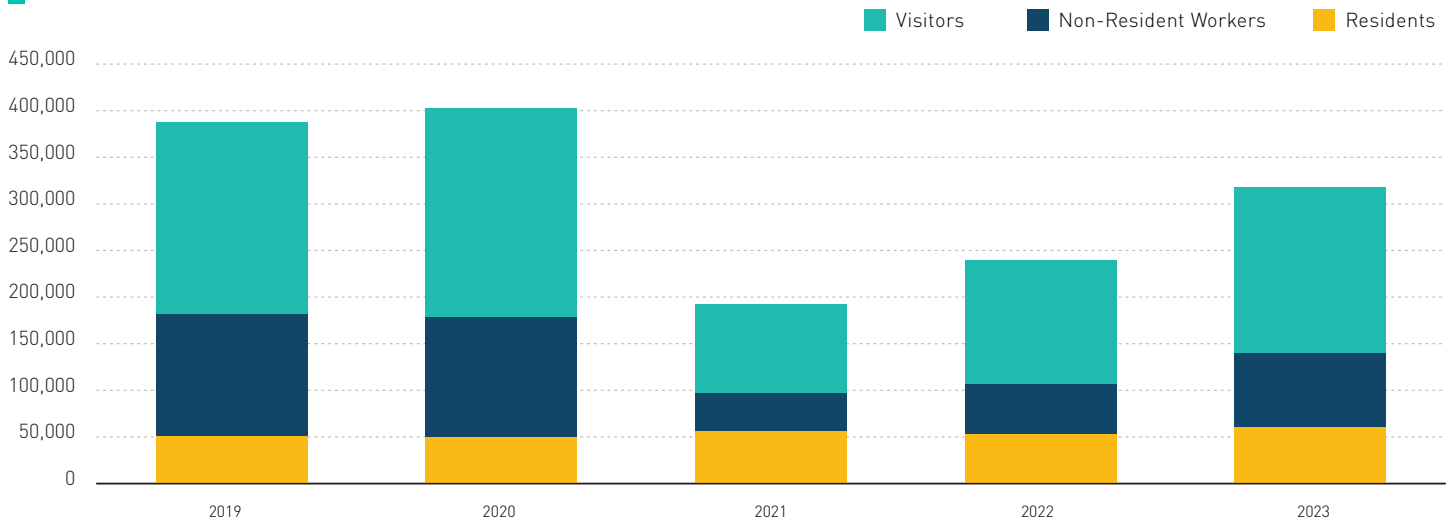
Center City’s average daily population plummeted to 113,600 in April 2020 and then steadily rose to 326,000 in December 2022, 76% of the December 2019 level with more residents now present than in 2019.

Figure 3:
Average Daily Visits to Core Center City as a Percentage of the Same Month in 2019



Source: Placer.ai

Figure 4:
Core Center City Average Daily Population from January 1st to 14th



Source: Placer.ai

Contrary to a national media narrative that the return to office has plateaued, multiple indicators suggest that Center City workers are steadily returning in greater numbers.

Figure 5:
Annual Pedestrian Volume by Location in 2022

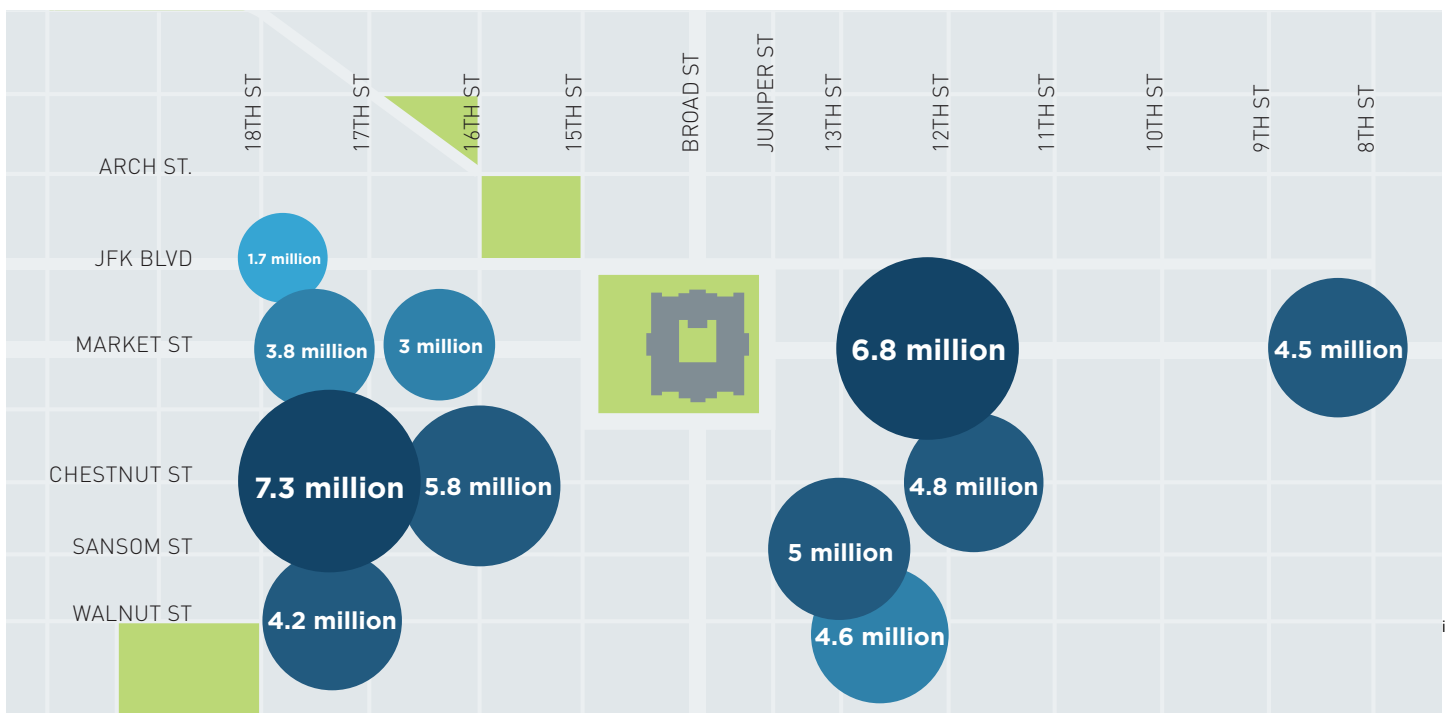
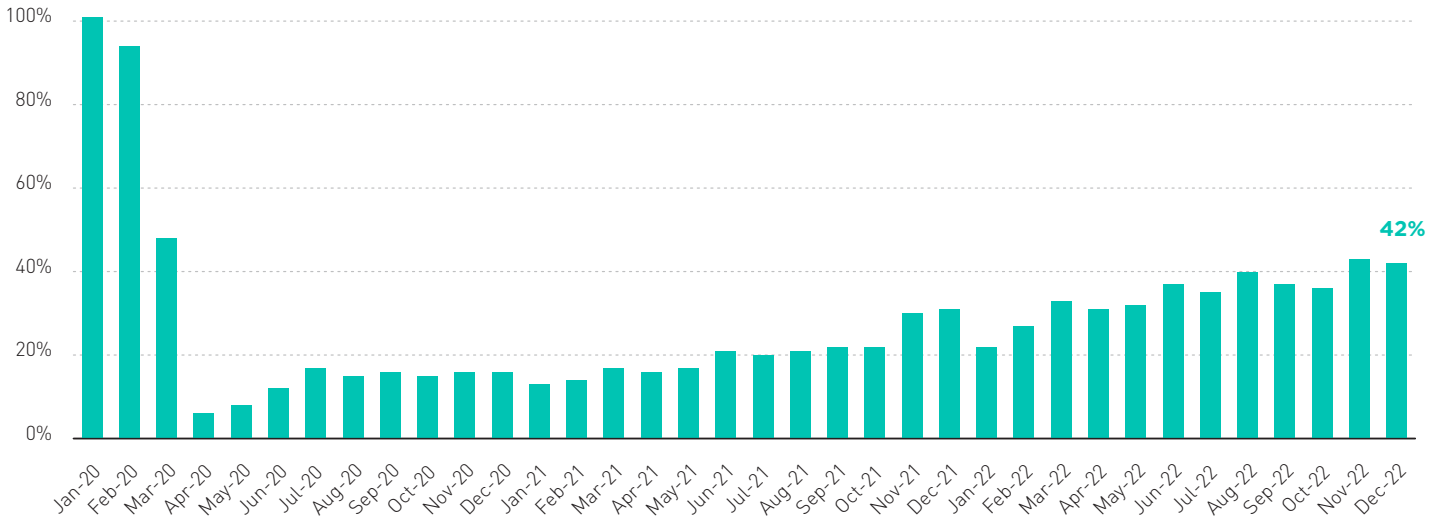
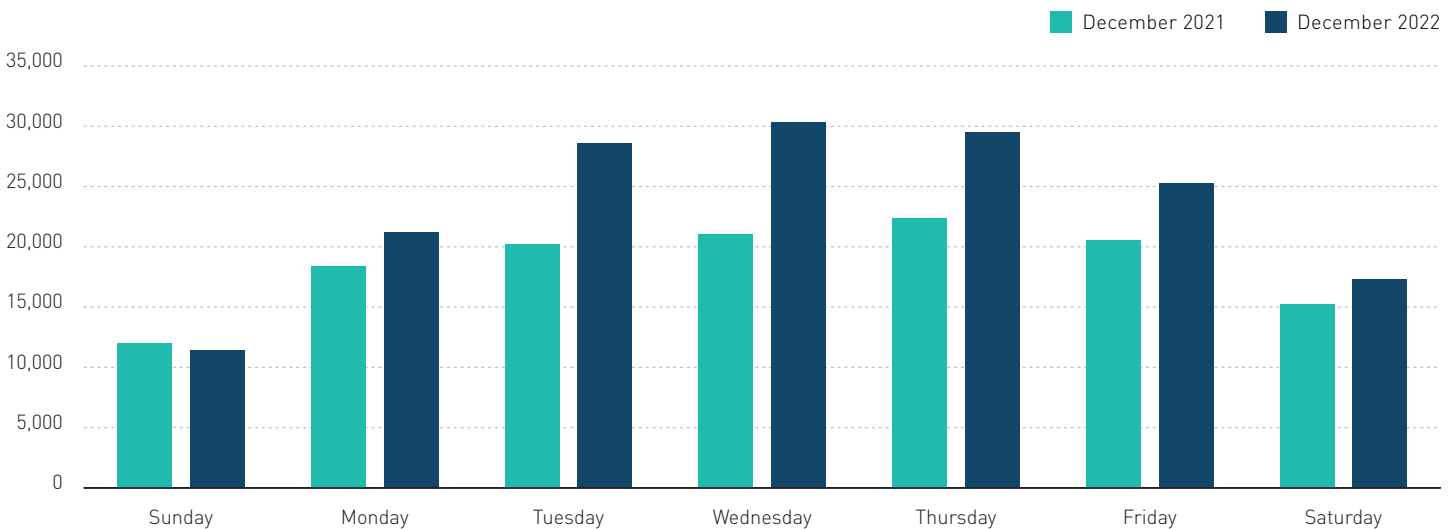


Figure 6:
**Non-Resident Worker Population in West Market Street Office District
 as a Percentage of Pre-Pandemic Level**



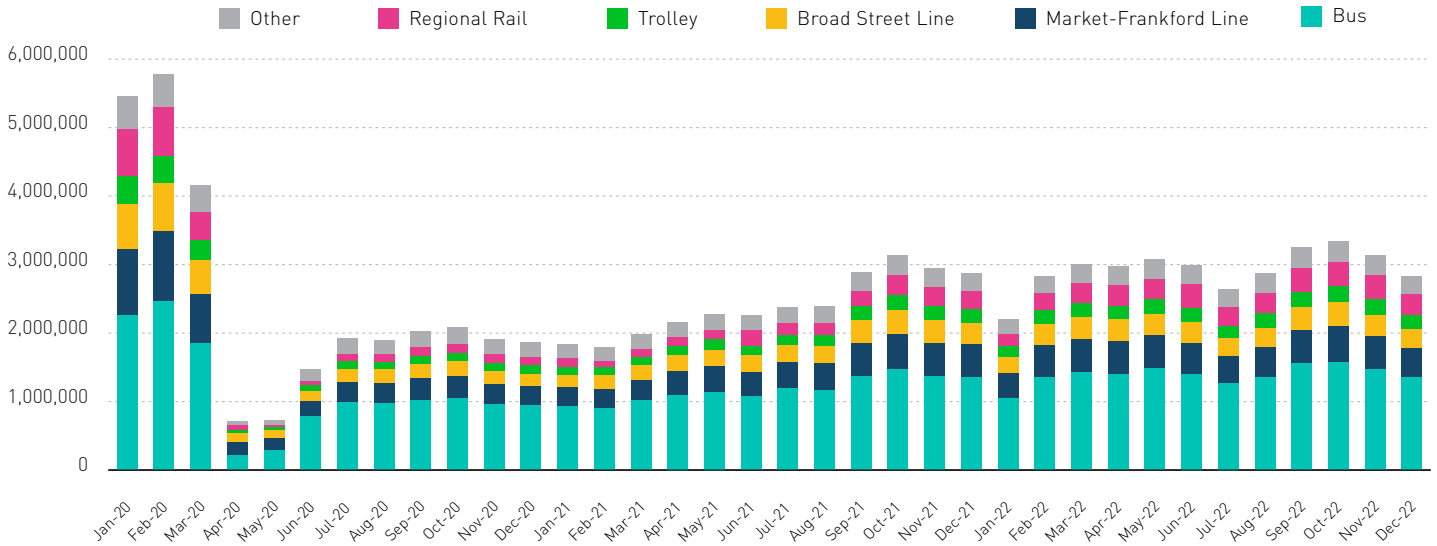
Source: Placer.ai

Figure 7:
**Daily Average Pedestrian Volumes in Office District, December 2021 vs December 2022,
 by Day of Week**



Source: Center City District Sensors

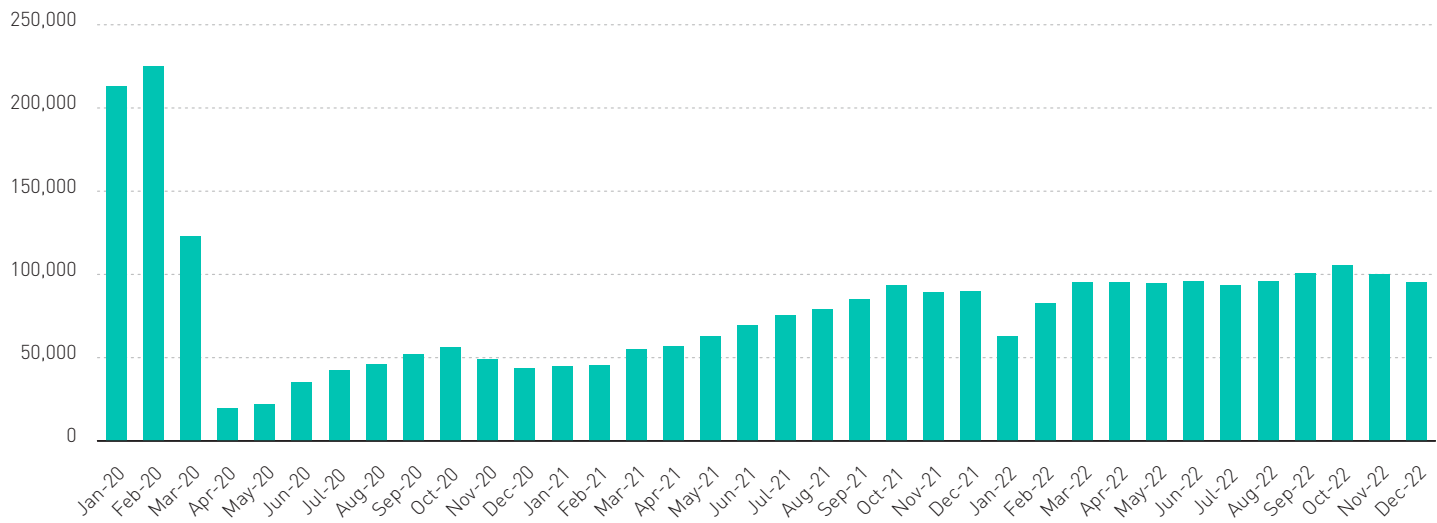
Figure 8:
SEPTA Average Weekly Ridership



Source: SEPTA Revenue and Ridership Report

SEPTA’s ridership has steadily risen to half of its February 2020 levels. But SEPTA has not lost very many individual customers. What has declined is the frequency at which those customers use the system, largely a result of hybrid work patterns. So SEPTA’s opportunities for growth are based not only on the number of days workers may be on site for their jobs, but also on finding ways to design their system and schedules for a growing number of non-9-to-5 passengers.

Figure 9:
PATCO Average Weekly Ridership



Source: Patco

Figure 10:
Diverse Land Use in the West Market District



The “office district” has been steadily diversifying its land-use for the last 25 years and the more mixed-use it becomes, the more vibrant it will be.

Building Momentum in 2023

In 2021 and 2022 with strong business support, CCD significantly ramped up on-street public safety efforts, adding a new bike patrol, expanding homeless outreach in partnership with Project Home and developing a routine process of coordination between the public safety staff of all city, state and federal law enforcement agencies, transit agencies and private security in office buildings and shopping centers. The net result was a 10.8% reduction in serious crime within the CCD boundaries from 2019 to 2022. At the same time, CCD actively programmed its parks, promoted restaurants, retail and cultural institutions, while making landscape improvements in the office district and on Walnut Street.

In 2023, CCD is partnering with major office buildings, transit agencies and public safety groups to reach out directly to office workers at lunch time in building lobbies with information about public safety and promotional material about the amenities of downtown. In the early summer, CCD will be partnering with office buildings to bring the types of athletic, cultural and dance events we program in Dilworth Park to office plazas in the late afternoon and evening – all efforts to enhance the vitality of the public environment in Center City. Restoring vibrancy and a thriving live-work downtown is key to the success of the office, education, health care, hospitality and residential sectors and to restoring job opportunities for residents from throughout the city and region.