

Building Back A More Diverse Downtown



Pedestrian Vitality: July 2023

Center City continued its steady process of recovery in June and during the first three weeks of July with pedestrian volumes reaching 92% of 2019 levels. The robust recovery of residents and visitors has led the way, while the number of workers in June approached 100,000, attaining 76% of June 2019 levels. Within the West Market Street office district, workers reached 57% of the 2019 level, a post-pandemic high.

The average daily population in the core of Center City, the area from Vine Street to South Street, river to river, increased to 384,300 in June, up 2% from 377,000 in the previous month, according to cellphone location data provided by Placer.ai. The June population included a daily average of 64,300 residents, 97,900 non-resident workers of all kinds, and 222,000 other visitors, which includes shoppers, tourists, convention attendees, health care patients, or anyone who visits Center City for business or leisure (Figure 1). The non-resident worker component of the downtown population has increased continually over the past three years and reached 76% of the 2019 level in June. Visitors have recovered to 84%,

reflecting the rebound in conventions, tourism, shopping and arts and culture. The number of residents present in Center City has increased to 64,300, substantially higher than in June 2019 (Figure 2).

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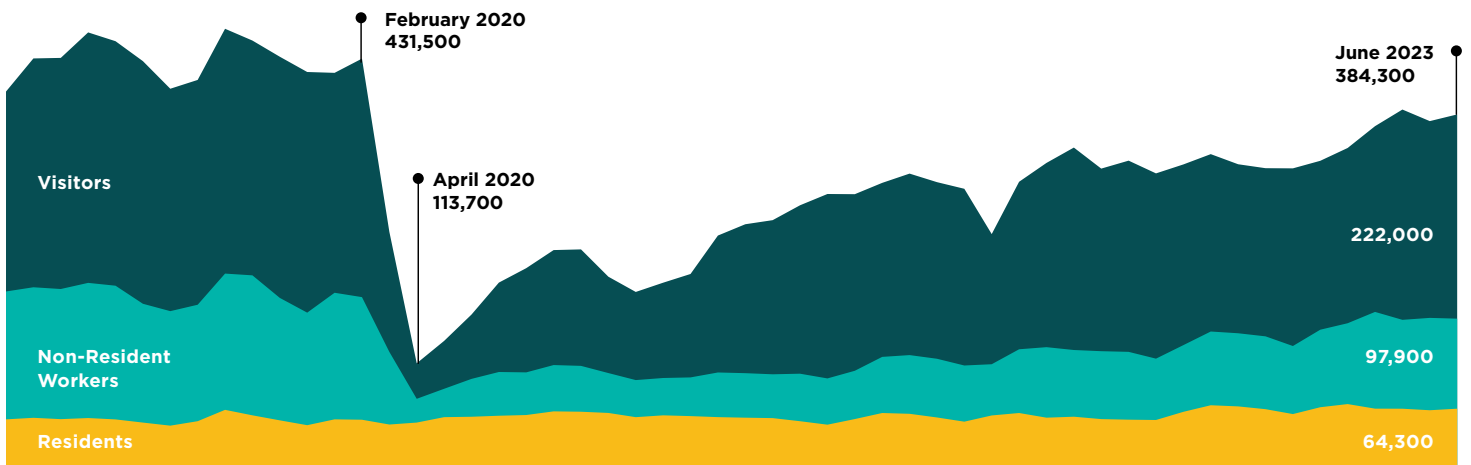
During the first three weeks of July, in what is the beginning of the traditional summer vacation season, the combined number of residents, workers and visitors averaged 353,400 per day, 92% of the same period in 2019 and 5% higher than last year.

The worker population averaged 86,600 per day, 20% higher than last year, recovering to 77% of the 2019 level (Figure 3).

To focus on just office workers, CCD monitors trends within the West Market Street office district, from City Hall to the Schuylkill River, from Ludlow Street to JFK Boulevard, with the addition of the triangular area from JFK Boulevard to the Benjamin Franklin Parkway from 16th to 19th street. (Figure 4.) Non-resident workers in this area have been steadily increasing and reached an average of 21,400 as of June, 57% of the 2019 level, the highest recovery rate of any month since 2020. The office worker population reached 50% of the pre-pandemic level for the first time in January 2023, and has remained above 50% in every month of 2023 except April (Figure 5).

The office worker population reached 57% of the pre-pandemic level in June 2023, peaking at 67% on Wednesdays.

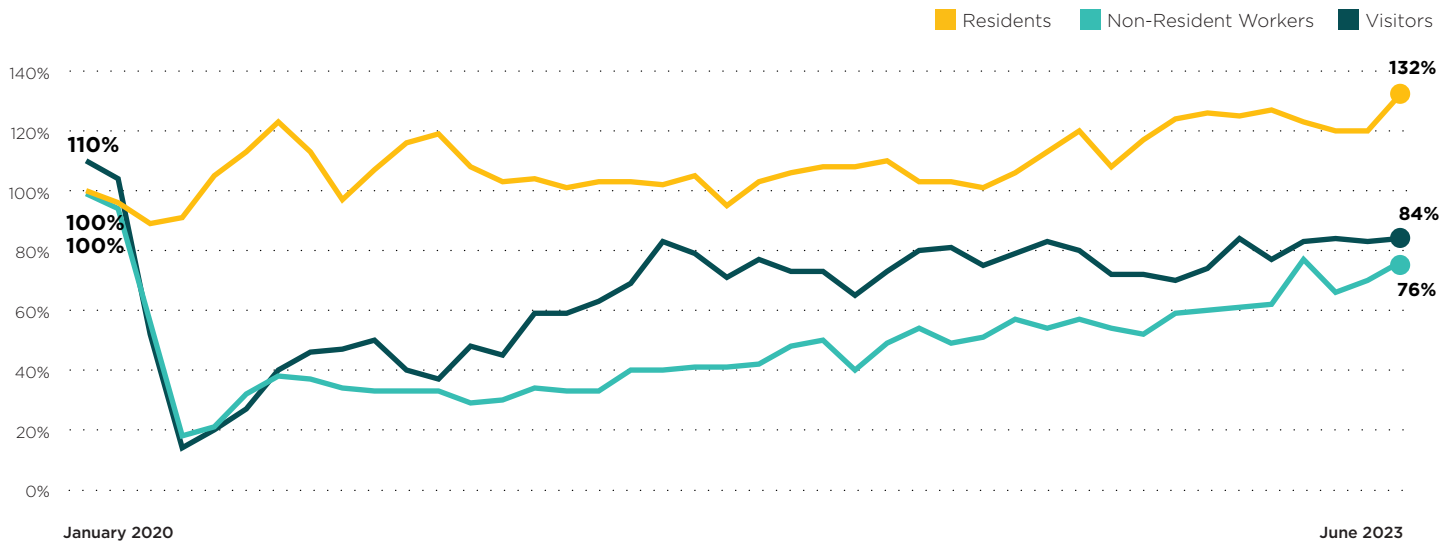
Figure 1: Core Center City Average Daily Population by Category



Source: Placer.ai

Figure 2: Core Center City Average Daily Population as a Percentage of 2019

The number of residents present in Center City has increased to 64,300, substantially higher than in June 2019



Source: Placer.ai

Figure 3: Core Center City Average Daily Population From July 1–21 as a Percentage of 2019
 The worker population averaged 86,600 per day, 20% higher than last year, recovering to 77% of the 2019 level

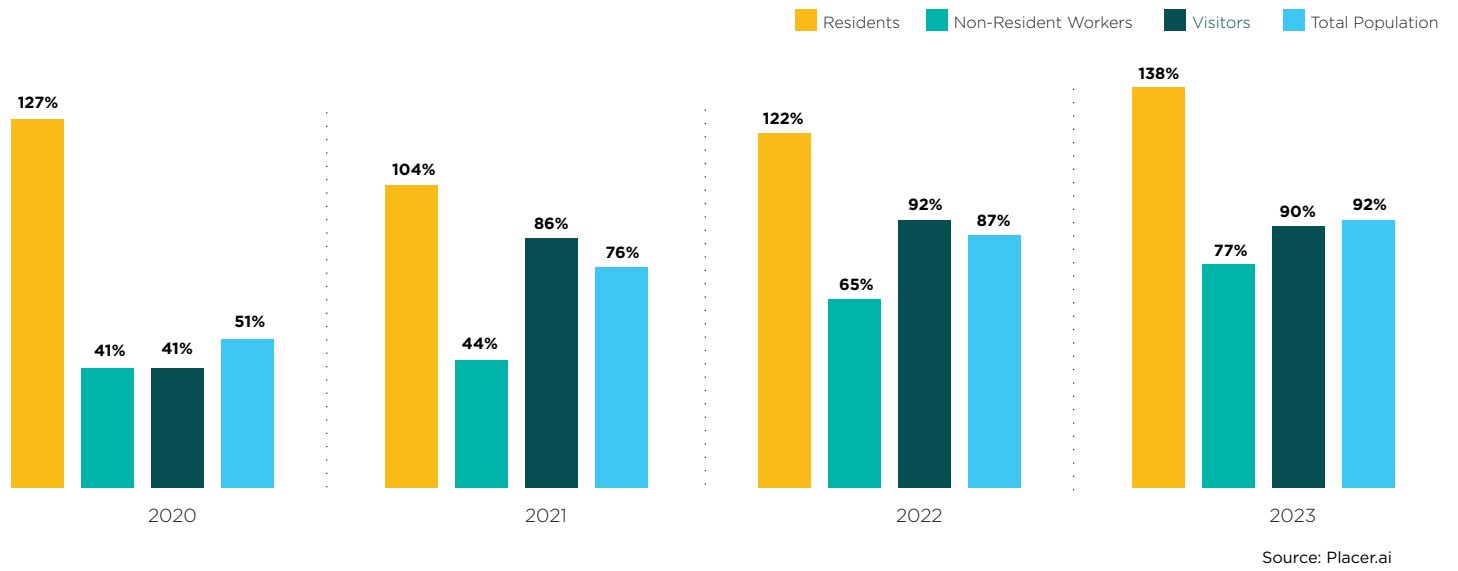


Figure 4: Areas for Measuring Pedestrian Volumes

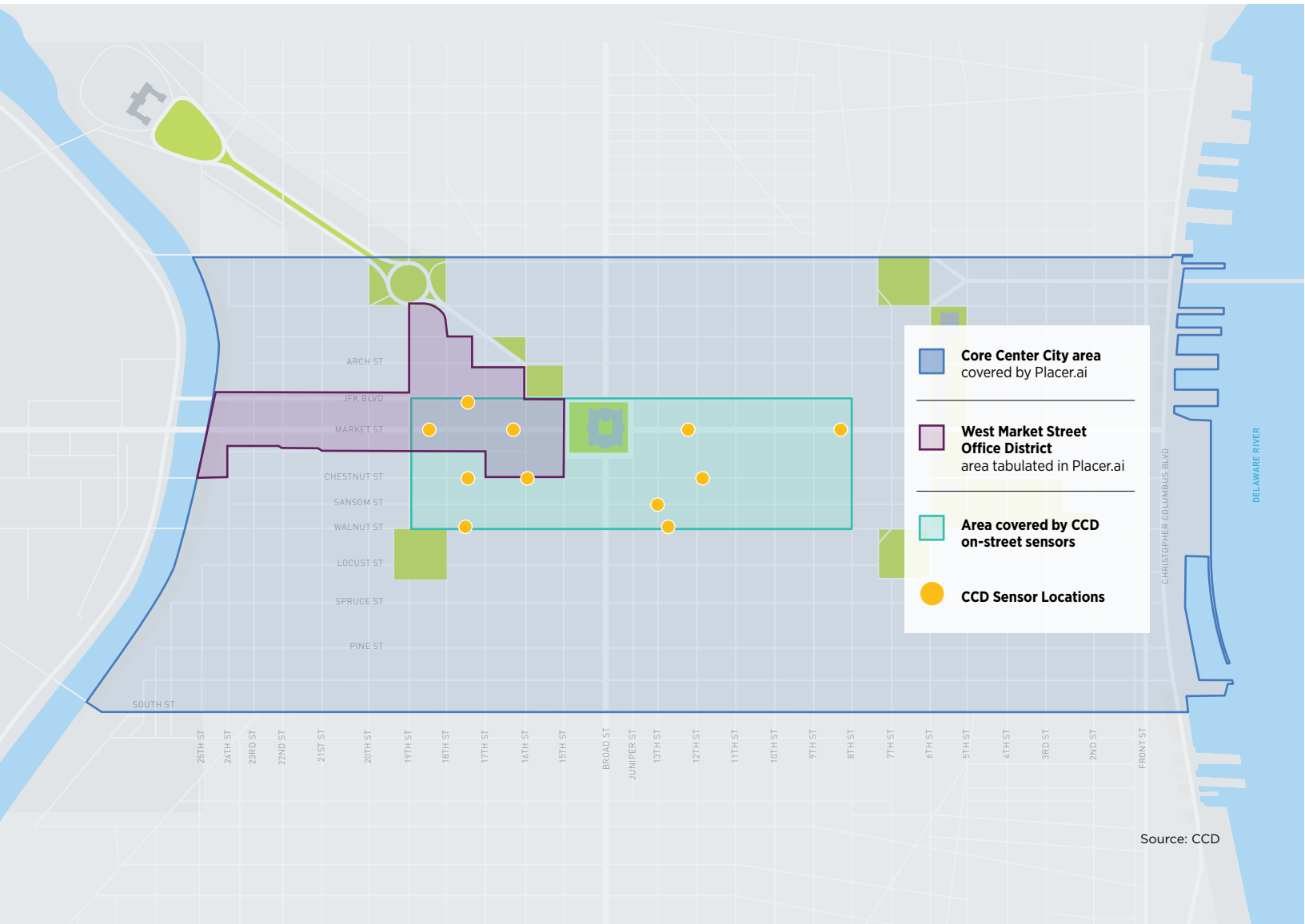
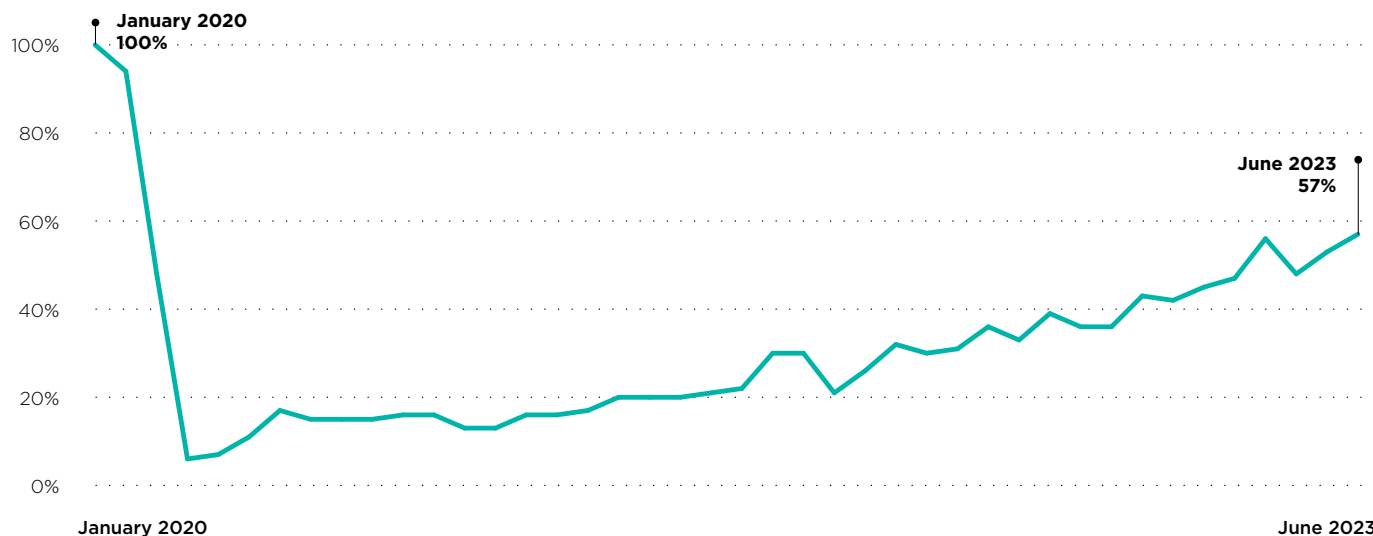


Figure 5: West Market Street Office District Non-Resident Workers as a Percentage of 2019

The office worker population reached 50% of the pre-pandemic level for the first time in January 2023, and has remained above 50% in every month of 2023 except April



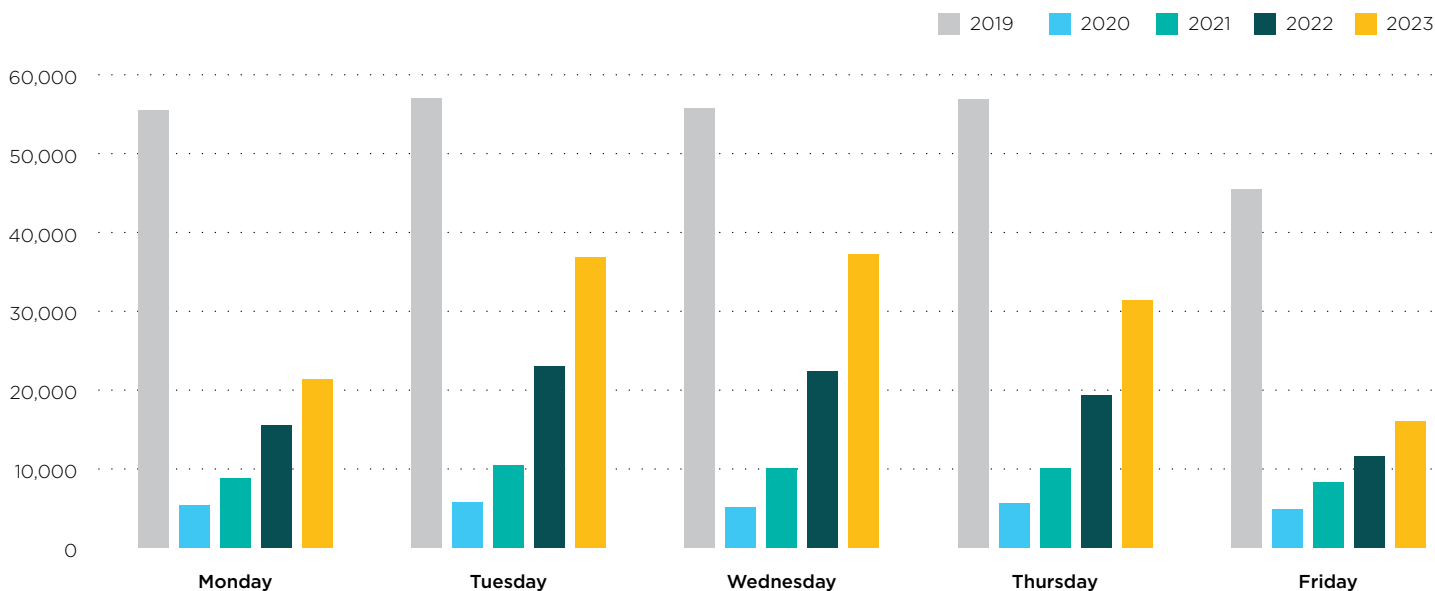
Source: Placer.ai

Prior to 2020 there was little variation from Monday through Thursday in the number of workers present in the office district, although there was a slight decline on Friday. Placer.ai data, however, show significantly higher attendance mid-week in 2022 and 2023, with a smaller downtown office worker population on Mondays and Fridays. While attendance remains highest midweek, there have been consistent increases on each weekday over the past year. On Wednesdays in June, the average number of non-resident workers in the office district was 37,200, 67% of the 2019 level (Figure 6). The trend lines clearly show that we have not reached any plateau in the return to office nor any new equilibrium: hybrid work patterns continue to evolve with a gradual increase in the return to office.

Another source of data on activity in the office district is provided by on-street sensors maintained by the CCD that monitor pedestrians on the 1600 and 1800 blocks of Market Street and the 1700 block of JFK Boulevard. The average daily pedestrian traffic at these three locations combined has increased steadily over the past three years, reaching a post-pandemic high of 28,732 in June, a 6% increase from June 2022. These sensors reflect the volume of all types of pedestrians, including residents and visitors as well as workers, but the general trend they record is consistent with and helps confirm the Placer.ai cellphone location data for non-resident workers in the West Market office district area (Figure 7).

Figure 6: West Market Street Office District Average Daily Non-Resident Worker Population in June by Day of Week

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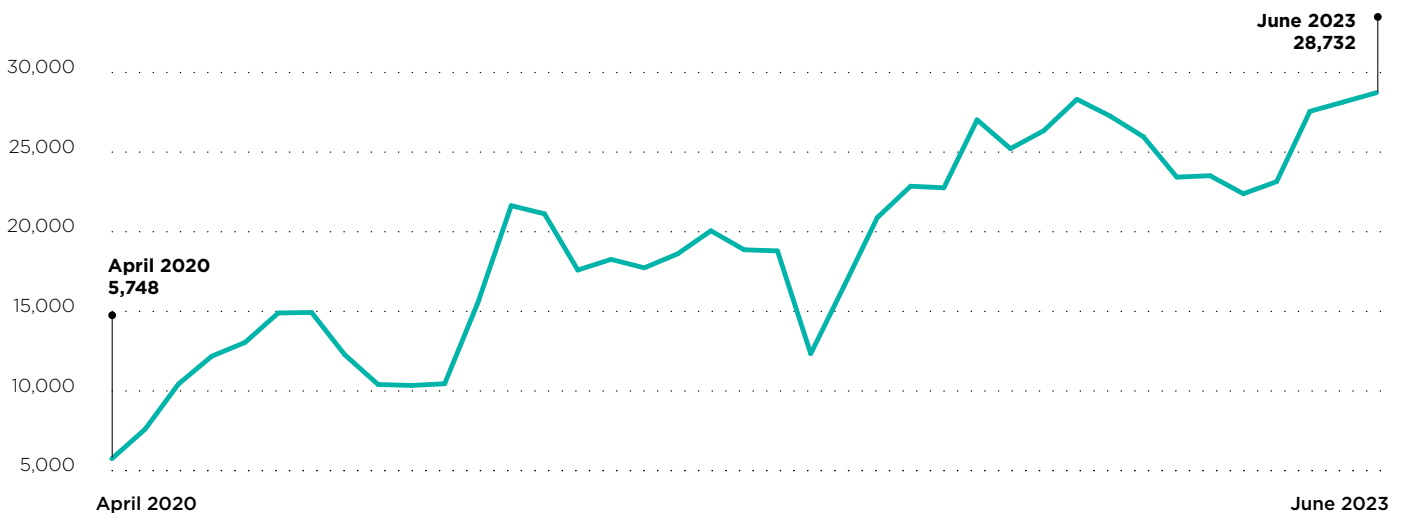


Source: Placer.ai



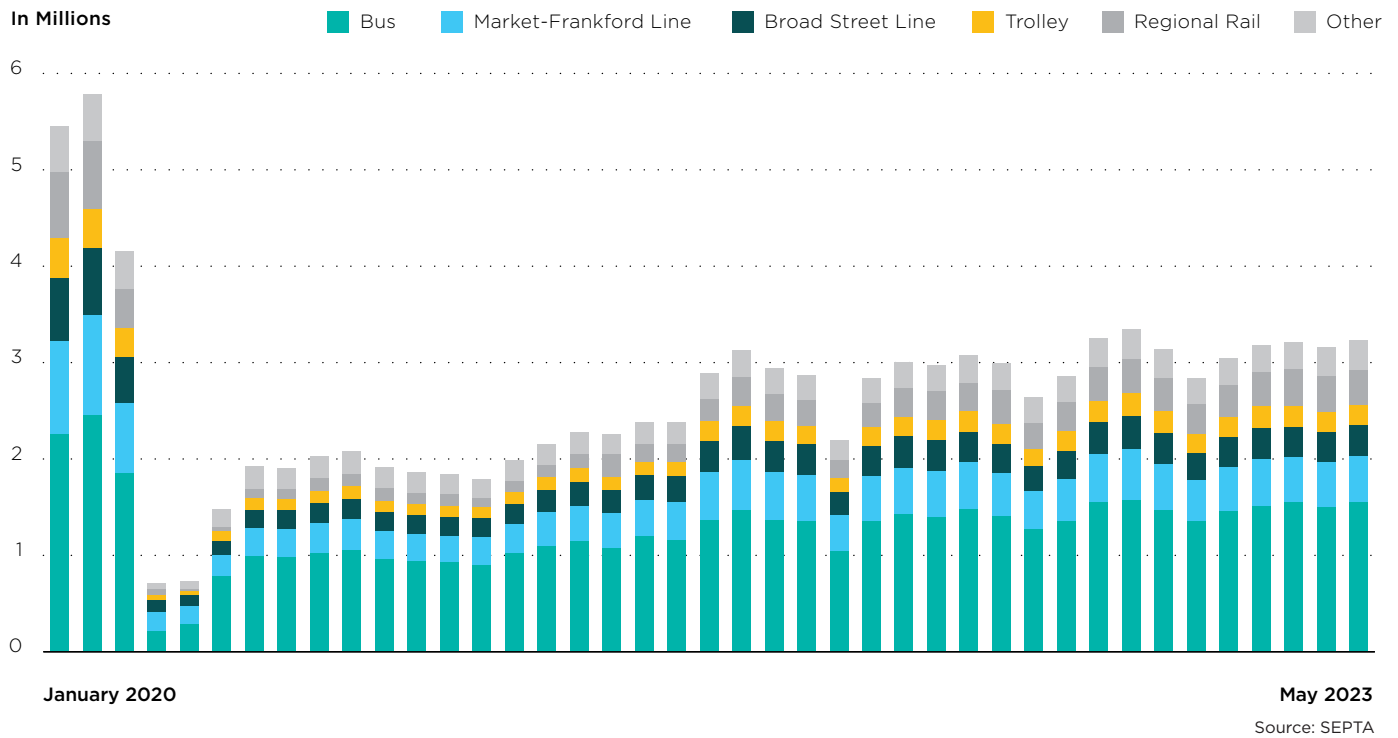
Figure 7: West Market Street Office District Average Daily Sidewalk Pedestrians

Data reflect pedestrians on 1600 and 1800 blocks of Market Street and 1700 block of JFK Boulevard.



Source: CCD sidewalk pedestrian sensors

Figure 8: SEPTA Average Weekly Ridership (Millions)



Average weekly ridership on SEPTA reached 3.2 million in May, a 2% increase from the previous month and 5% higher than in May 2022.

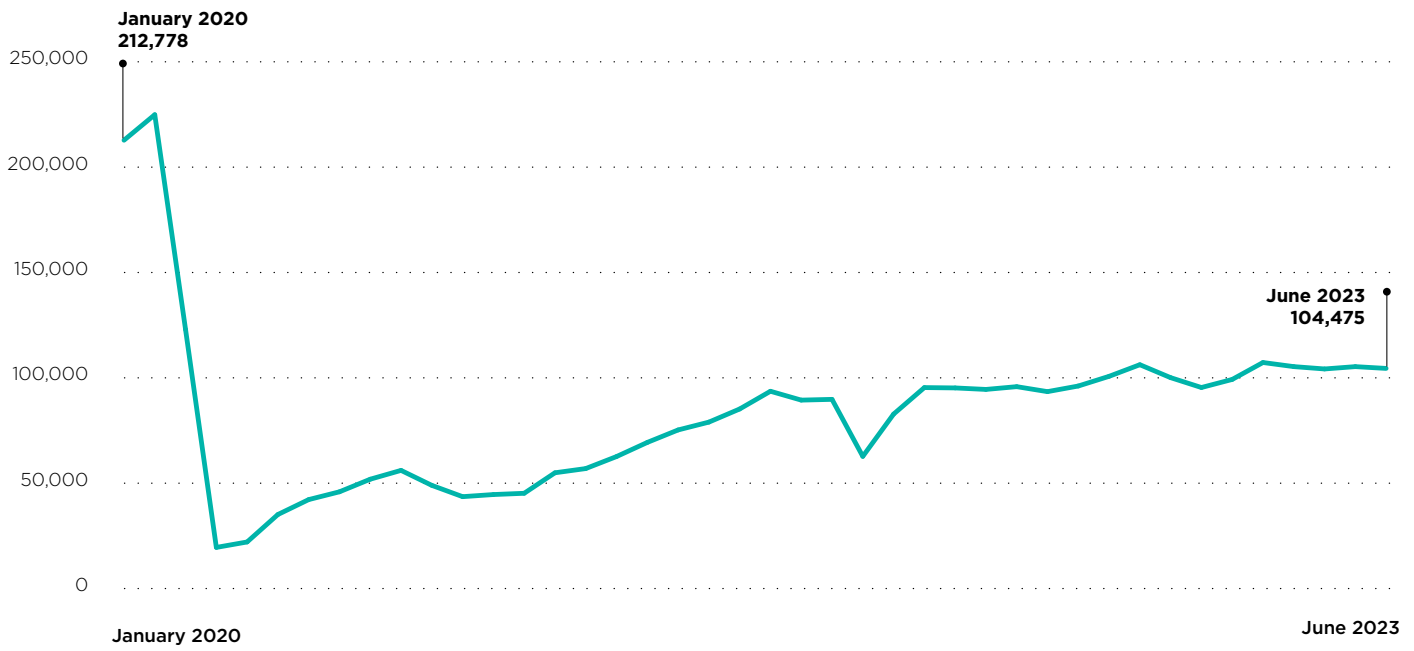
Public Transit Ridership

Rebounding transit ridership is another key measure of downtown recovery. Average weekly ridership on SEPTA reached 3.2 million in May, a 2% increase from the previous month and 5% higher than in May 2022. Most components of the system have seen ridership increases over May of last year, with bus riders up 5%, Regional Rail riders up 22%, and riders on the Broad Street Line and trolleys up 0.5% and 0.3% respectively. Only the Market-Frankford Line experienced a ridership decline of 2% compared to last year (Figure 8). Still, overall SEPTA has recovered just 56% of its February 2020 ridership levels. Average weekly ridership on the PATCO high speed line in June 2023 was 104,475, an increase of 9% over June 2022. PATCO’s June ridership was 46% of the February 2020 level (Figure 9).

To encourage the use of public transit as workers return to the office, SEPTA has begun offering two new fare-reduction programs. Key Commuter, an opt-in benefit for employers, provides a 5% discount from SEPTA on monthly passes when employers match that amount, for a combined 10% savings to employees. Key Advantage offers employers and colleges and universities the ability to purchase All-Access passes for employees and students at discounts up to 80%. These are both important efforts to restore transit ridership in advance of the expiration of federal recovery funds.



Figure 9: PATCO Average Weekly Ridership



Source: PATCO



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