



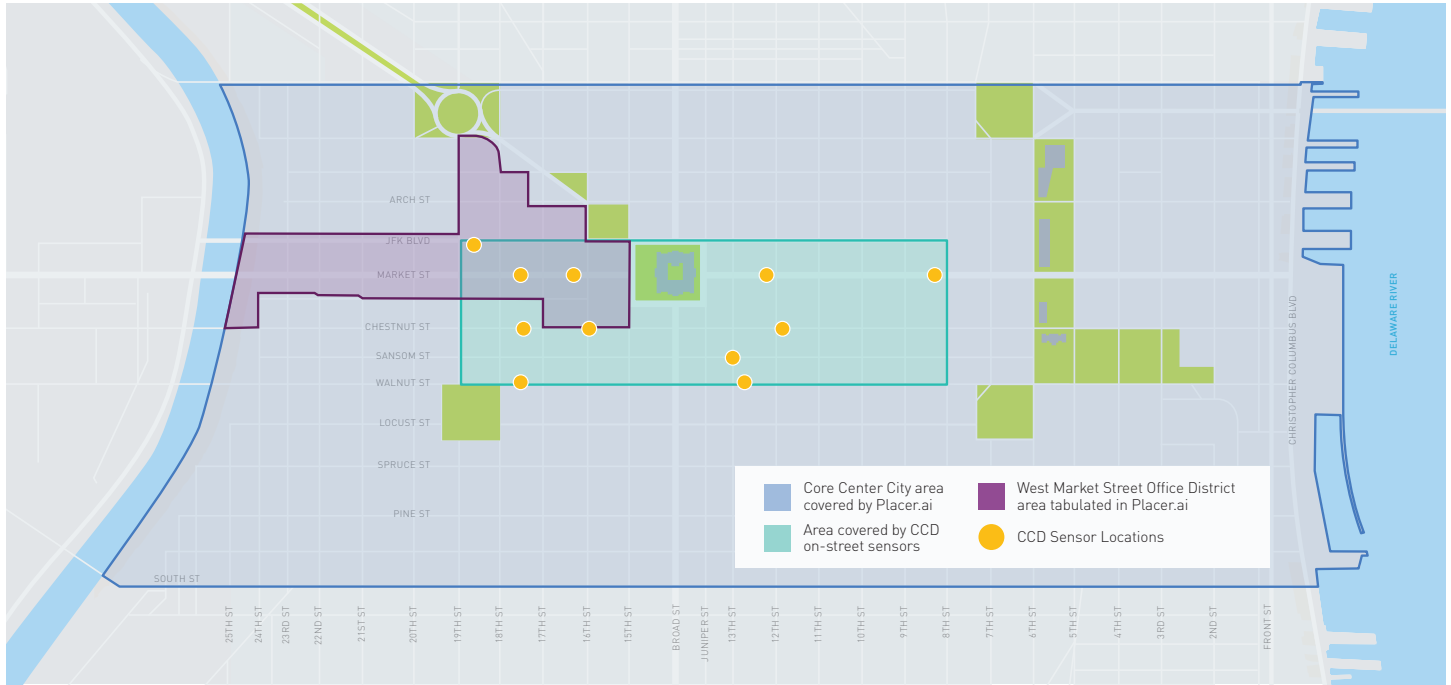
Pedestrian Vitality: Spring 2023

The number of people in the core of Center City Philadelphia, from Vine to South Street, river to river, continued to increase to an average daily volume of 347,800 in February 2023, 78% of the February 2019 level, according to mobile phone location data from Placer.ai. Twenty percent of this total, 69,400, are residents who live in core Center City; 25%, 87,900, were non-resident workers in all job sectors downtown; and 55%, 190,500, were tourists, shoppers, patients at health care providers, visitors to cultural institutions or attendees at events in the Pennsylvania Convention Center, like the Pennsylvania Horticultural Society (PHS) Flower Show.

Residents have been the most consistent and, with the continued addition of new housing, are now living in Center City in greater numbers than before February 2020. The largest rebound however, has been in the visitor category, rising from an April 2020 low of 38,600 to 190,500 in February 2023. There was also a pronounced increase in non-resident workers from a low of 25,800 in April 2020 to 87,900 in February 2023, 62% of the pre-pandemic level.

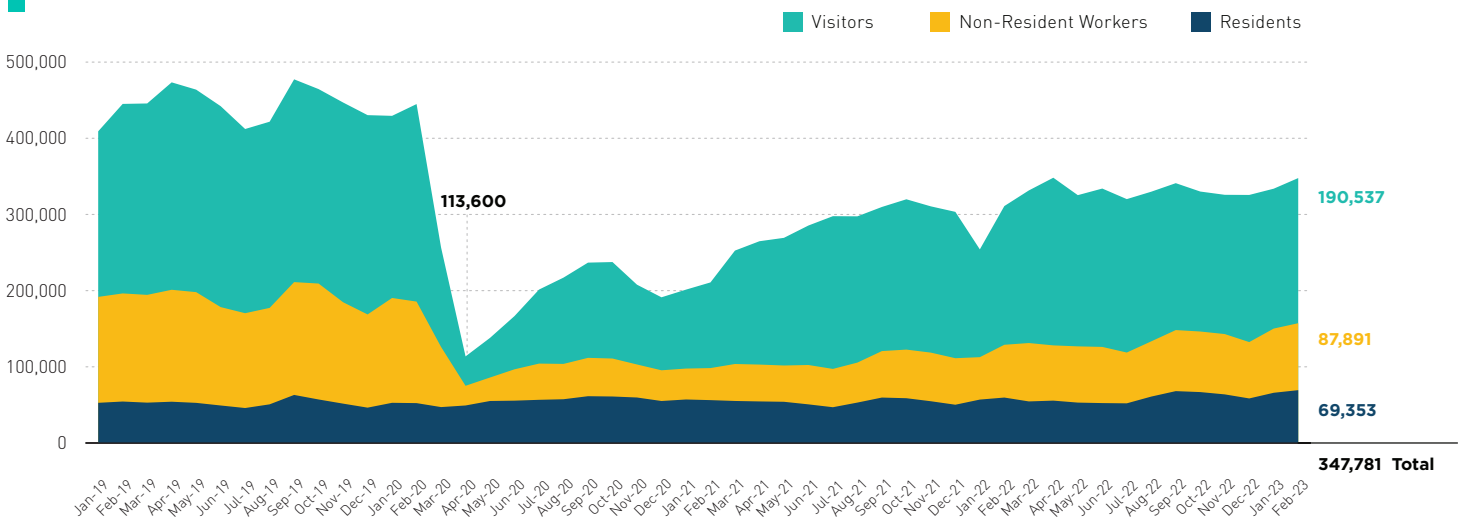
A steady increase in office workers, patrons of cultural institutions and visitors to the Flower Show helped restore pedestrian volumes to 78% of February 2019 levels.

Figure 1:
Areas for Measuring Pedestrian Volumes



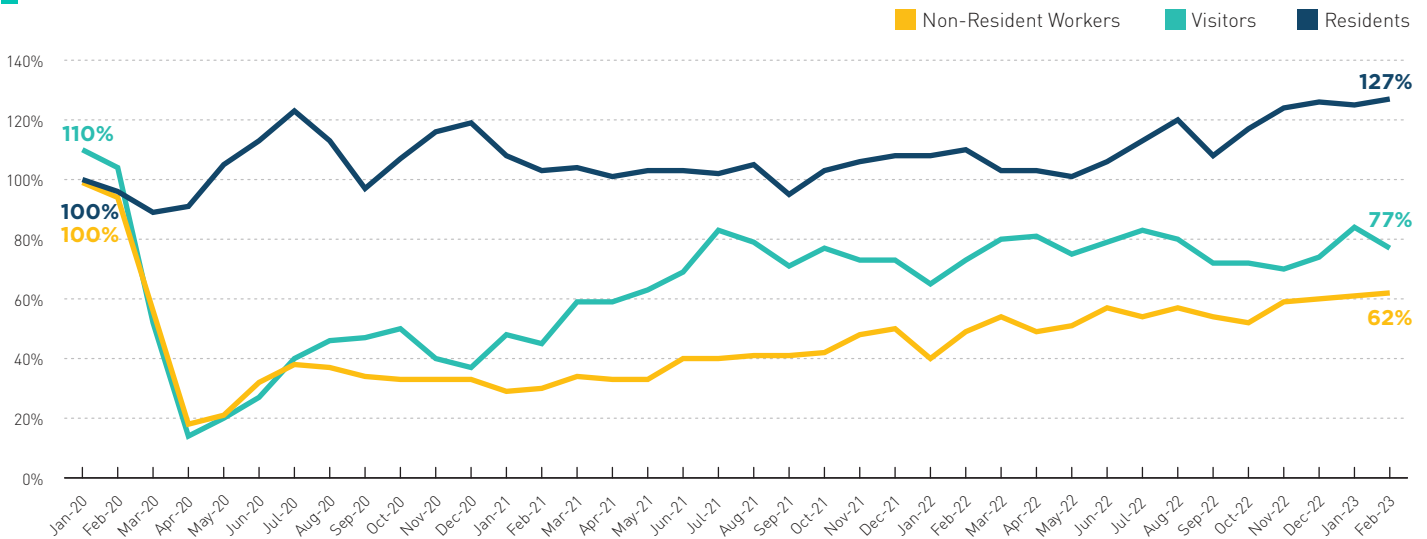
Source: Center City District Sensors

Figure 2:
Average Daily Visits to Core Center City



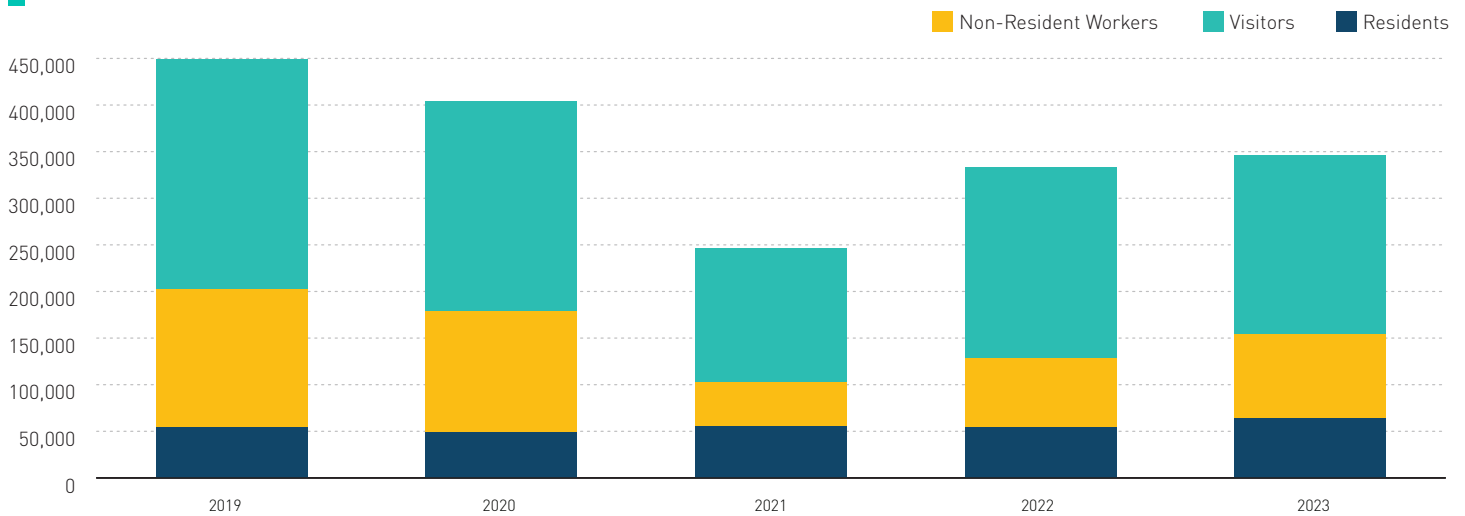
Source: Placer.ai

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 March 1 to 14



Source: Placer.ai

About the Data in this Report

The vitality on Center City sidewalks is created by three types of pedestrians: those who live downtown; those who commute to work from throughout the city and region; and tourists, convention attendees, shoppers and those who come for business or to access health care or other services. Center City District (CCD) uses two independent sources of data to track the volume of people downtown. First, CCD has installed sensors at 11 blocks located within the commercial core from 8th to 19th Streets and JFK Boulevard to Walnut Street. Figure 1 on page 2 shows the location of these sensors. In addition, CCD uses Placer.ai daily estimates of the core Center City population based on mobile phone location data. These data represent the total daily number of people in the area from Vine Street to South Street, river to river, and are sorted separately for residents, non-resident workers and other visitors.

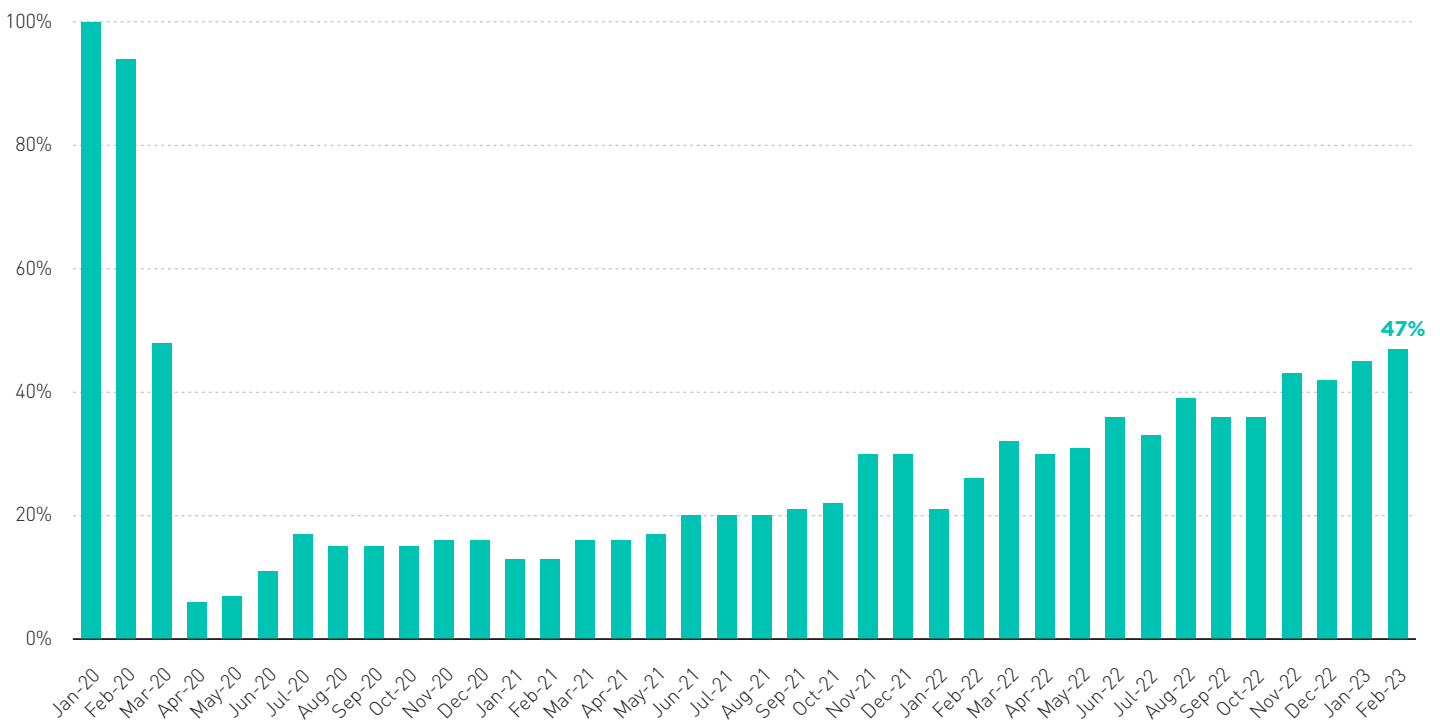
Office District Pedestrians

One of the most promising signs, because of its impact on transit ridership and retail jobs and sales, has been the slow but steady return of office workers. Data from CCD’s on-street pedestrian sensors, located in the West Market Street-JFK Boulevard office district, on the 1600 and 1800 blocks of Market Street and on the 1700 block of JFK Boulevard, show

counts rising from a low of 11% of the 2019 level in April 2020 to 48% as of February 2023. Similarly, Placer.ai data for a slightly larger area show volumes rising from a low of 2,427 per day in April 2020 to 17,927 in February 2023 (Figure 5).

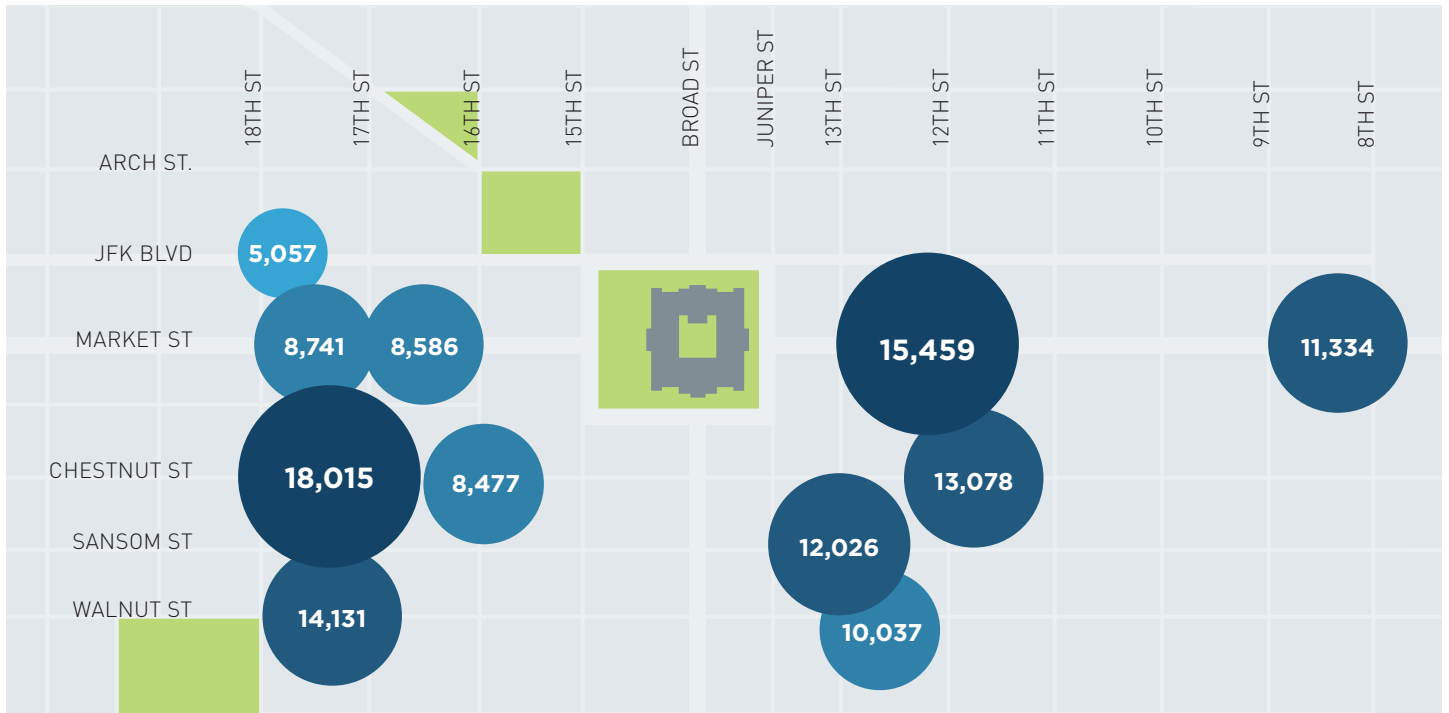
Volumes in the office district were highest during the middle of the week, peaking on Tuesdays and Wednesdays in February 2023 with Tuesday counts 71% higher than in 2022 and Monday and Friday counts higher than all weekdays in 2022. (Figure 7)

Figure 5:
Non-Resident Worker Population in West Market Street Office District as a Percentage of Pre-Pandemic Level



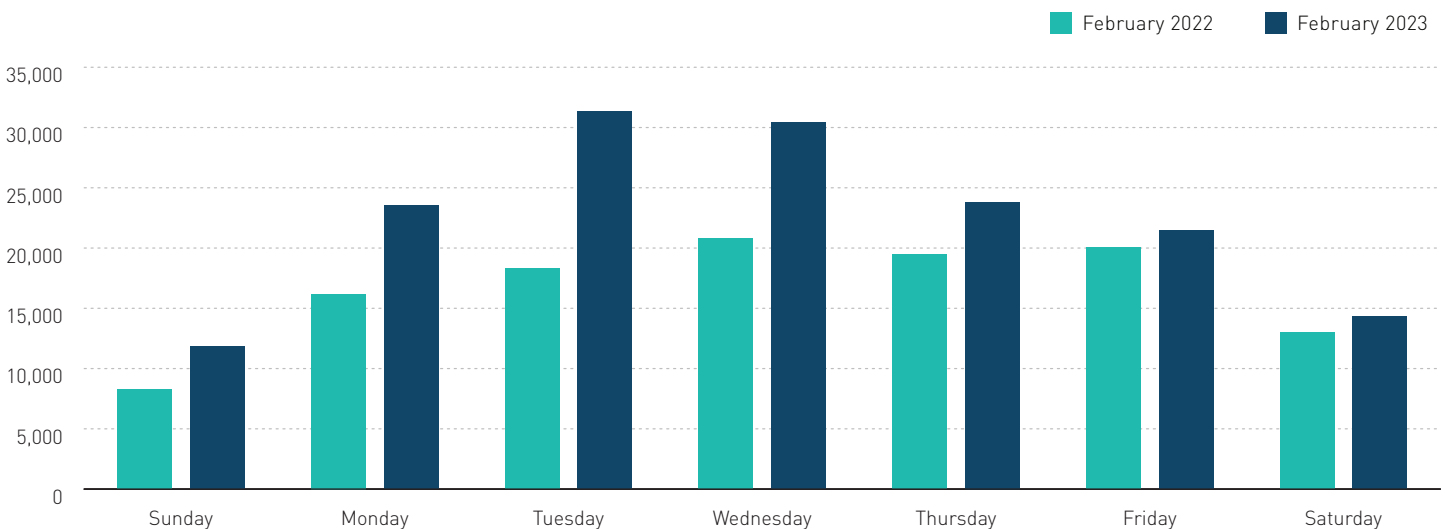
Source: Placer.ai

Figure 6:
Average Daily Pedestrian Volume by Sensor Location in February 2023



Source: Center City District Sensors

Figure 7:
Average Daily West Market-JFK Pedestrians by Day of Week:
February 2023 compared to February 2022



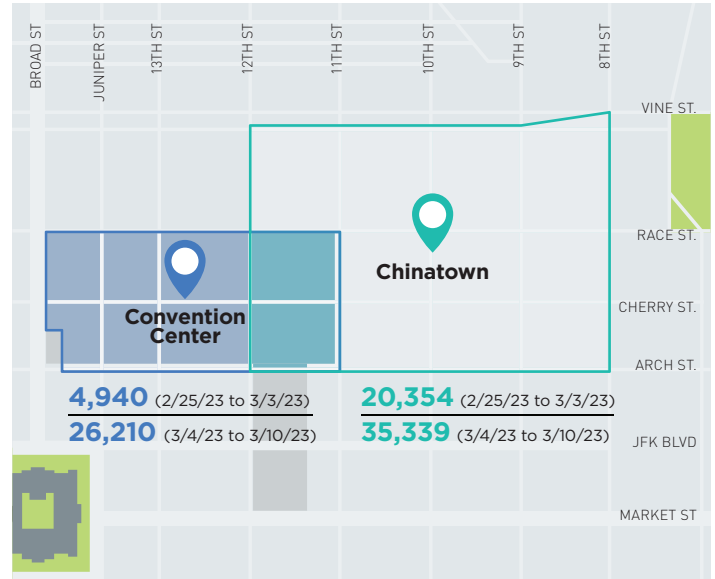
Source: Center City District Sensors

Impact of the Flower Show

In 2023, the Pennsylvania Convention Center is projecting more than 1 million visitors, nearly double 2022 levels. The PHS Philadelphia Flower Show from March 4 to March 12 shows the significant impact these events can have not only on hotel occupancy, but also on the immediate surrounding area. At the Convention Center itself, Placer.ai data shows a fourfold increase in daily pedestrian volume from 4,900 to 26,200, comparing the week ending of March 3 to the week ending on March 10, 2023. In adjacent Chinatown, from Arch Street to Vine Street between 8th and 12th streets, Placer.ai counts suggest that the average daily population walking in front of shops and restaurants increased from 20,400 in the week ending March 3 to 35,300 in the week ending March 10, a 74% increase.

Visitors to the Flower Show came not only from the city, but also the region and other states. Placer.ai data suggests that 19% of Convention Center visitors during the week of the show were city residents, while 32% lived in other locations within Pennsylvania, 19% were from New Jersey, and 31% from other states.

Figure 8:
Average Daily Pedestrian Counts: Impact of the Flower Show



Source: Placer.ai



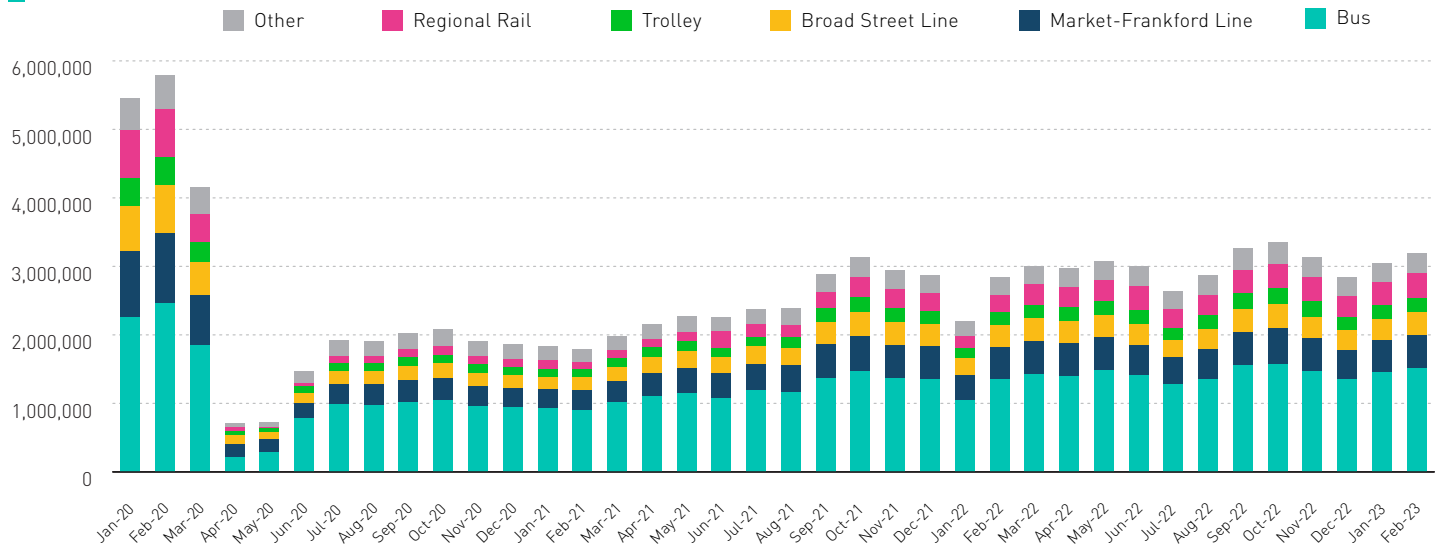
Transit Ridership

Average weekly SEPTA ridership in February was 3.18 million, a 5% increase over January. Ridership rose on every mode. City Transit Division bus riders increased 4.0%, the Market-Frankford Line and Broad Street Line increased 5.0% and 5.2% respectively, trolleys were up 6.3% and Regional Rail rose 6.6%. Regional Rail ridership averaged 359,900 in February, a post-pandemic peak. Overall ridership as of February reached 55% of the February 2020 level, with the largest percentage recovery within City Transit Division buses, where total riders were at 62% of the pre-pandemic number. Market-Frankford

Line riders were at 47% of the 2020 level, Broad Street Line at 46%, trolleys at 55% and Regional Rail at 51%.

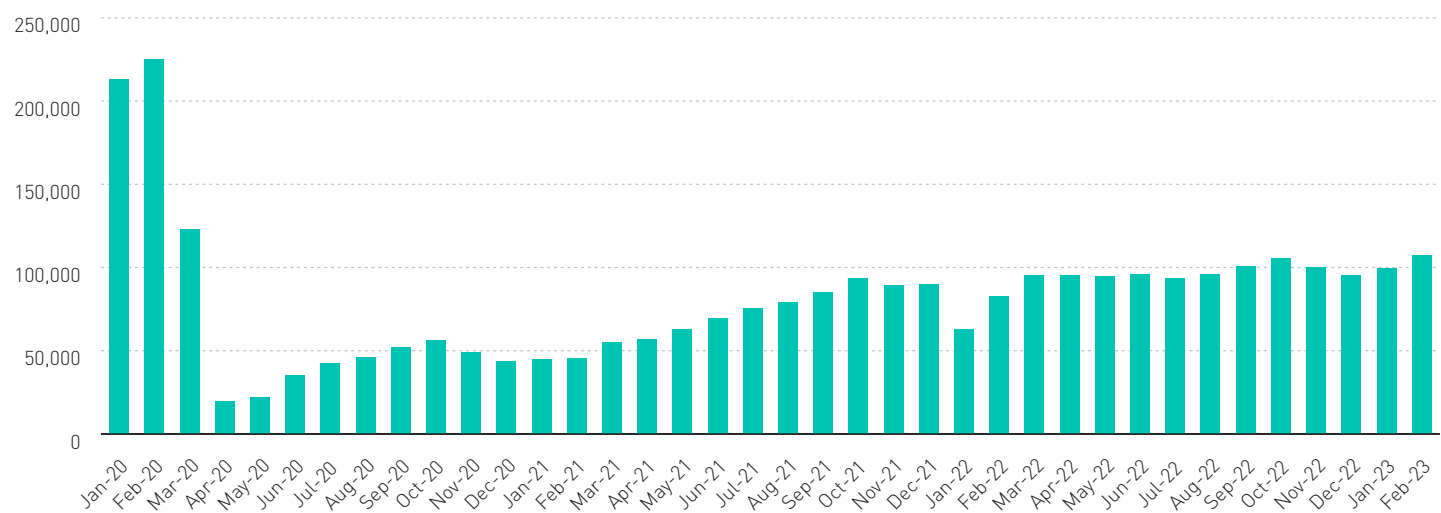
PATCO ridership, which supports both East Market Street and the West Market office district, also shows a gradual recovery, with average weekly ridership surpassing 100,000 for the first time since 2020 in September. After declining somewhat in December to 95,400, it increased to 107,300 in February, the highest since March 2020. The February ridership level is 48% of the February 2020 level.

Figure 10:
SEPTA Average Weekly Ridership



Source: Septa Revenue and Ridership Report

Figure 11:
PATCO Average Weekly Ridership



Source: Patco