

# Center City Recovery Update

November 2023



## Recovery In Center City: Progress Across All Sectors

The total number of workers, residents and visitors in Center City from Vine to South Street, river to river, continued to rise in October 2023 to a daily average of 382,300, **82% of October 2019 levels**, with the largest increases among workers and residents. Based on Placer.ai anonymized mobile phone data, the daily average of residents was 71,600, 7% higher than October 2022; non-resident workers increased by 12% to a seven-day average of 101,100; and the largest category, visitors, increased by 2% over last year to 209,700 (Figures 1, 2).

With ongoing construction and occupancy of new, large multifamily developments, Center City's resident population has increased steadily during the past four years, rebounding quickly from a temporary drop in spring 2020, climbing to

**126% of October 2019** levels last month (Figure 3).<sup>1</sup>

Worker recovery varies significantly by industry. Hospitality, retail, arts and entertainment jobs are those most likely to be performed in person, followed by those in health care and education, with the office sector providing the most opportunities for hybrid and remote work. While the overall seven-day per week average, **non-resident worker** recovery rate in core Center City in the third quarter of 2023 was **70%**, the recovery of workers along East Market, around the Convention Center and in nearby hotels reached **81%** of 2019 levels. In the West Walnut retail district worker recovery reached **77%**; along the Avenue of the Arts, it was **60%**; and in the West Market/JFK office district it was **53%** (Figure 4).

1. The increase in residents is due both to a net increase in population downtown and the likely reduction in business travel that causes some working, downtown residents to stay in Center City more nights of the week.

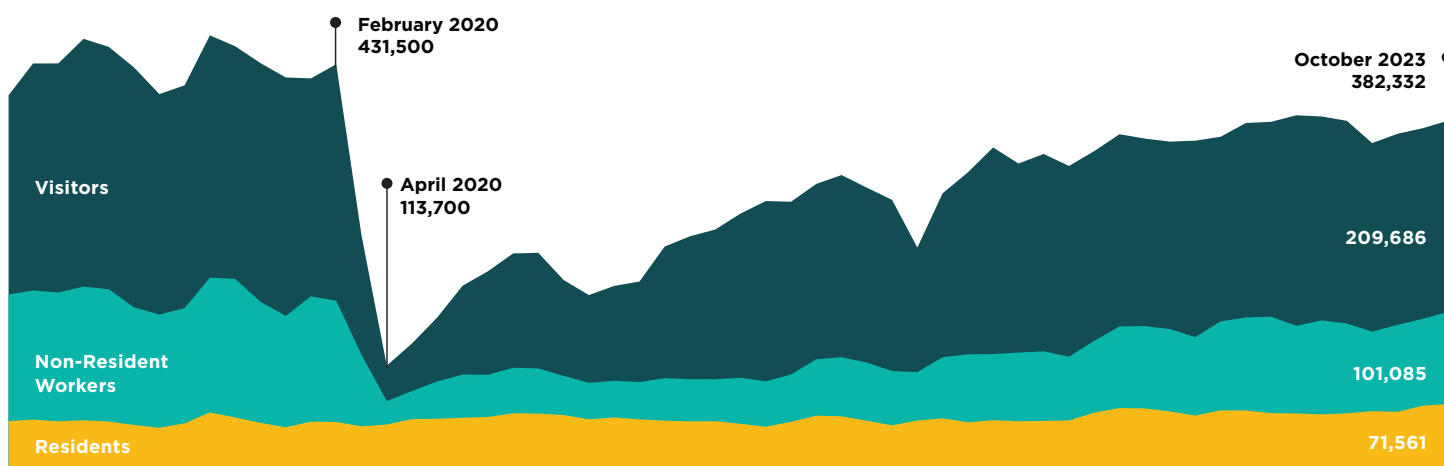
While the rate of worker recovery in the office district has trailed other sections of Center City, it has steadily risen since the second quarter of 2020 (Figure 5).

Given the national trend for visitors to return more rapidly than workers, it is no surprise that core Center City recovery is generally stronger on weekends than on weekdays. In the third quarter of 2023, non-resident workers present in Center City on weekend days averaged 40,700, 98% of the Q3 2019 level, while the 114,210 workers in Center City on weekdays was only 68% of the pre-pandemic level. Visitors averaged 221,303 per day during the third quarter on weekends, 88% of the 2019 level, and 203,200 on weekdays, 81% of Q3 2019.<sup>2</sup>

For residents, workers, and visitors combined, weekends rebounded to 95% of the 2019 level, compared to 81% on weekdays.

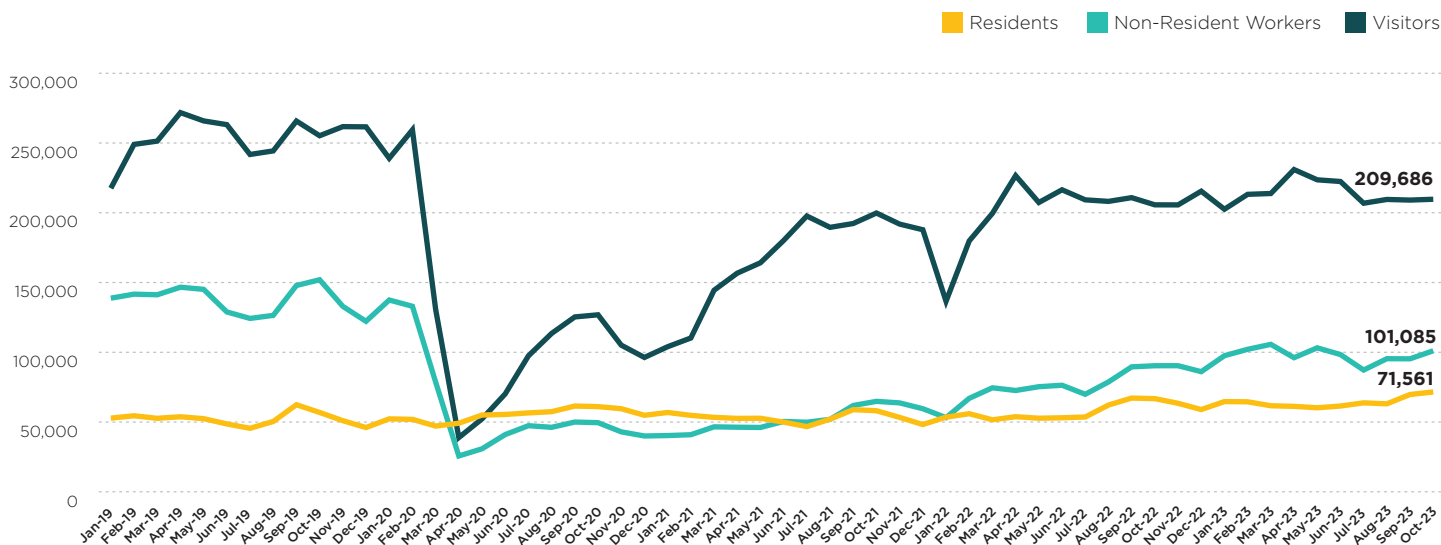
In addition to Placer.ai data, CCD also maintains sidewalk pedestrian sensors on 11 blocks in Center City, including three locations within the office district: the 1600 and 1800 blocks of West Market Street and the 1700 block of JFK Boulevard. Data from these sensors not only confirm the increase in office workers documented in Placer data, they also show an increase in pedestrians on every day of the workweek compared to 2022. The peak days, Tuesday through Thursday, increased by 15% over 2022 levels along the 1700 block of

**Figure 1:** Average Daily Number of Residents, Workers and Visitors in Center City



Source: Placer.ai

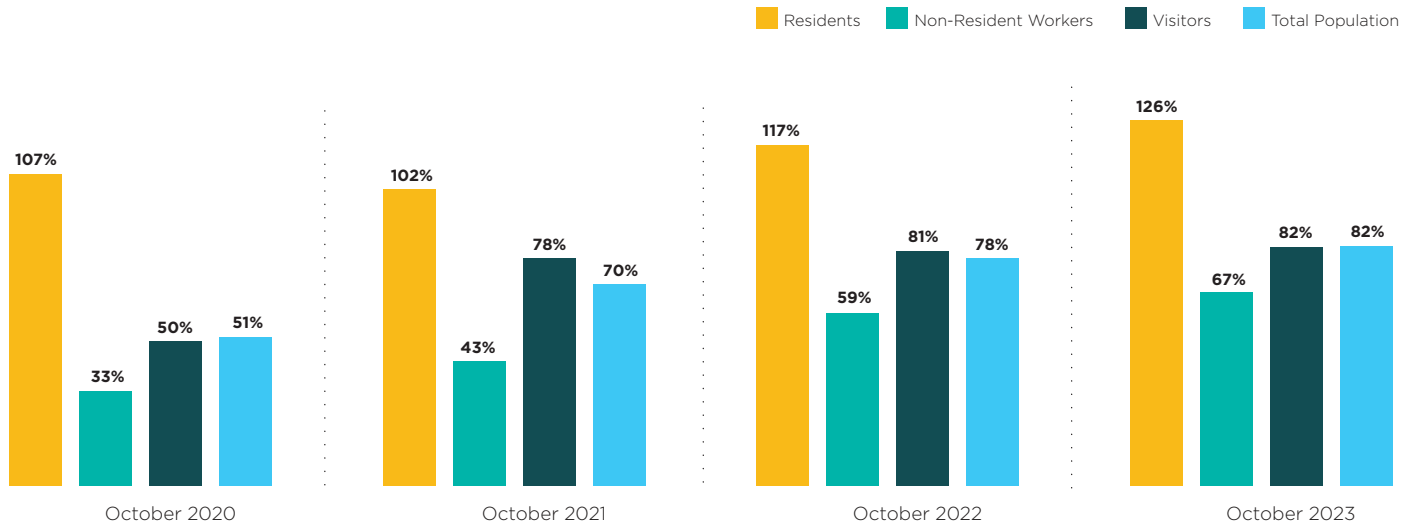
**Figure 2:** Average Daily Volume of Residents, Workers and Visitors in Core Center City



Source: Placer.ai

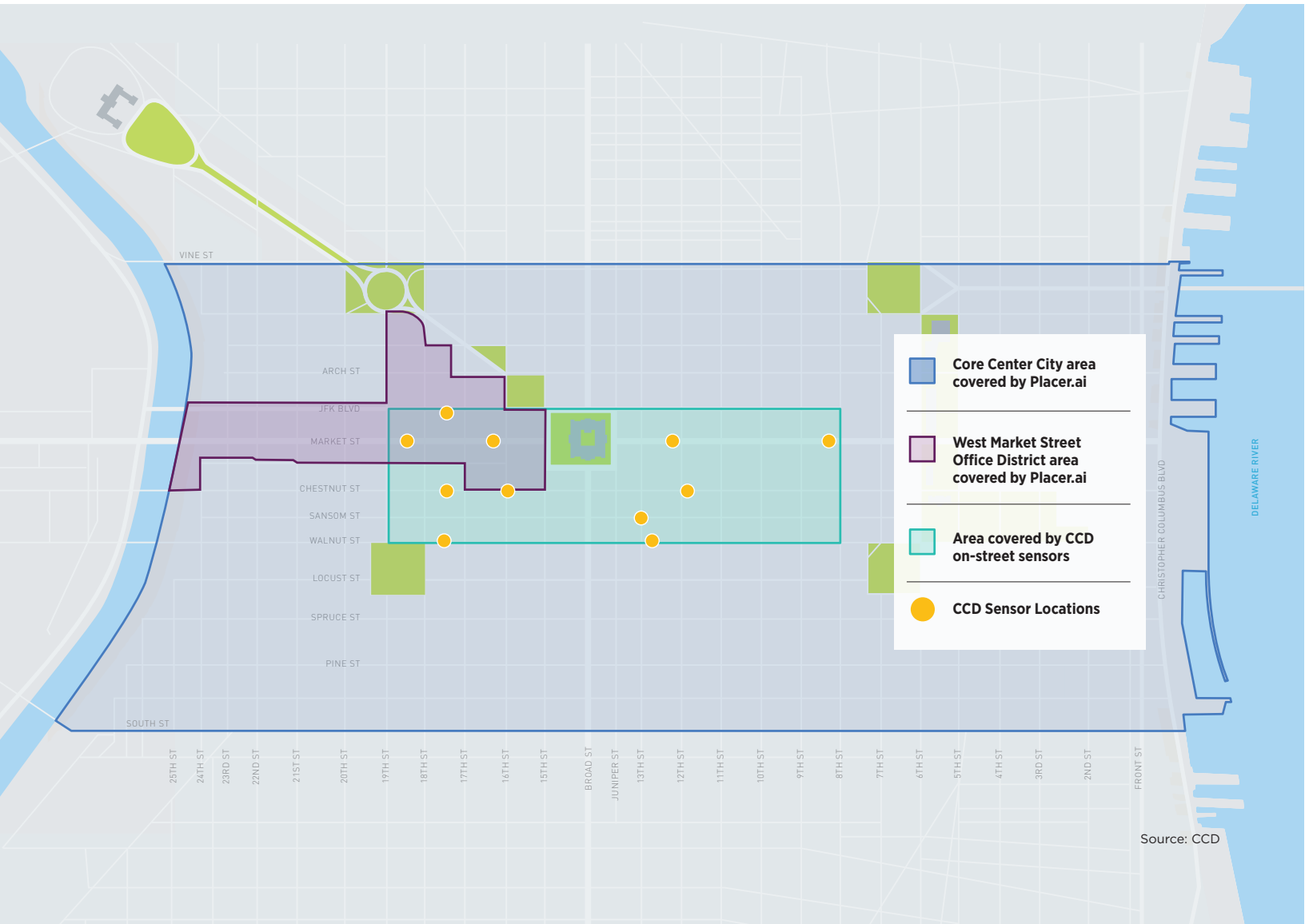
<sup>2</sup> Placer.ai's definition of visitors includes convention attendees and tourists, shoppers, restaurant patrons and those coming into Center City for a variety of professional and personal services.

**Figure 3:** Annual Recovery Rate of Residents, Workers and Visitors to Core Center City Compared to October 2019



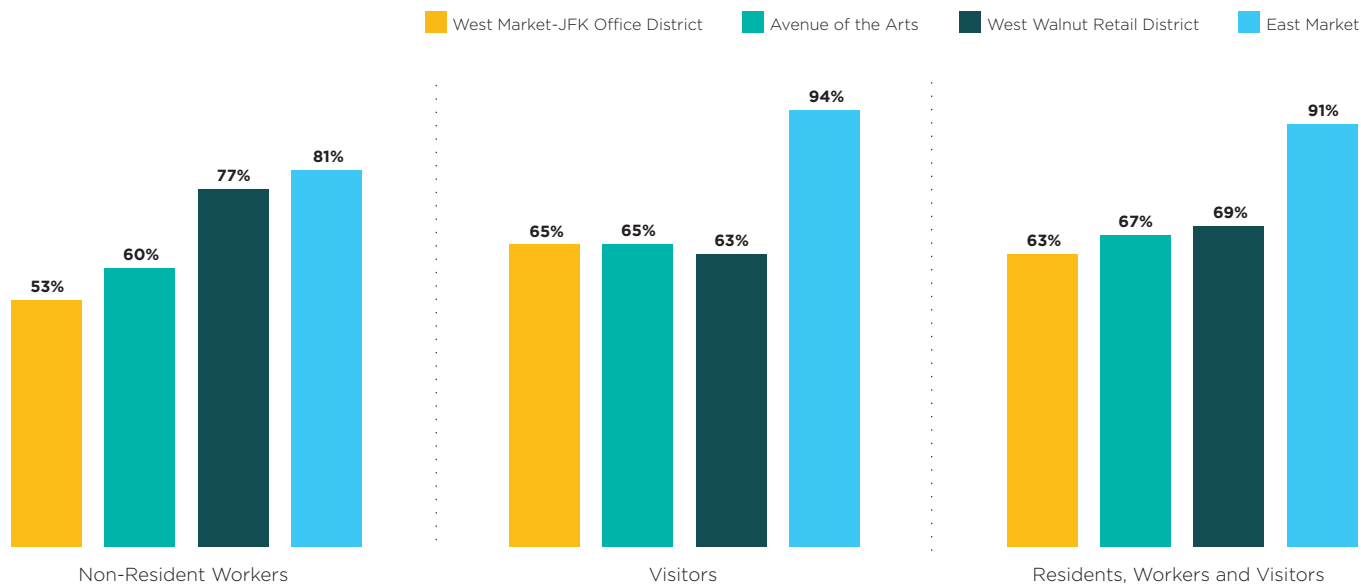
Source: Placer.ai

**Areas for Measuring Pedestrian Volumes**



Source: CCD

**Figure 4:** Recovery Rate of Non-Resident Workers and Visitors by Area of Center City in Q3 2023 as a Percentage of Q3 2019  
 Worker and visitor recovery varied across Center City, with the highest recovery in East Market.



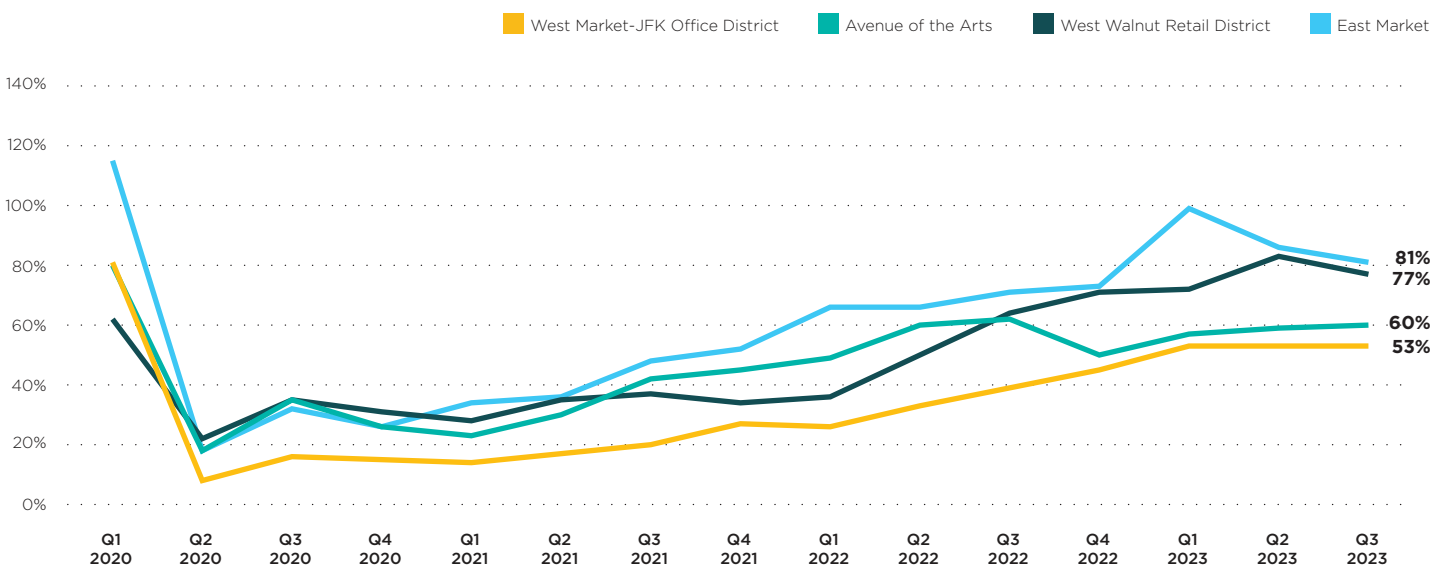
Source: Placer.ai

JFK Boulevard and by 5% on the 1800 block of Market Street. (Figure 6).

CCD’s recent national report, *Downtowns Rebound*, based on Placer.ai data through June 2023, found that Center City ranked fifth out of 26 downtowns nationally in terms of recovery of total volumes of people downtown (<https://centercityphila.org/research-reports/downtowns-rebound-report-2023>). Center City’s diverse employment mix—with a high percentage of jobs in health care, leisure and hospitality, and retail—contributed to the relatively high recovery rate for

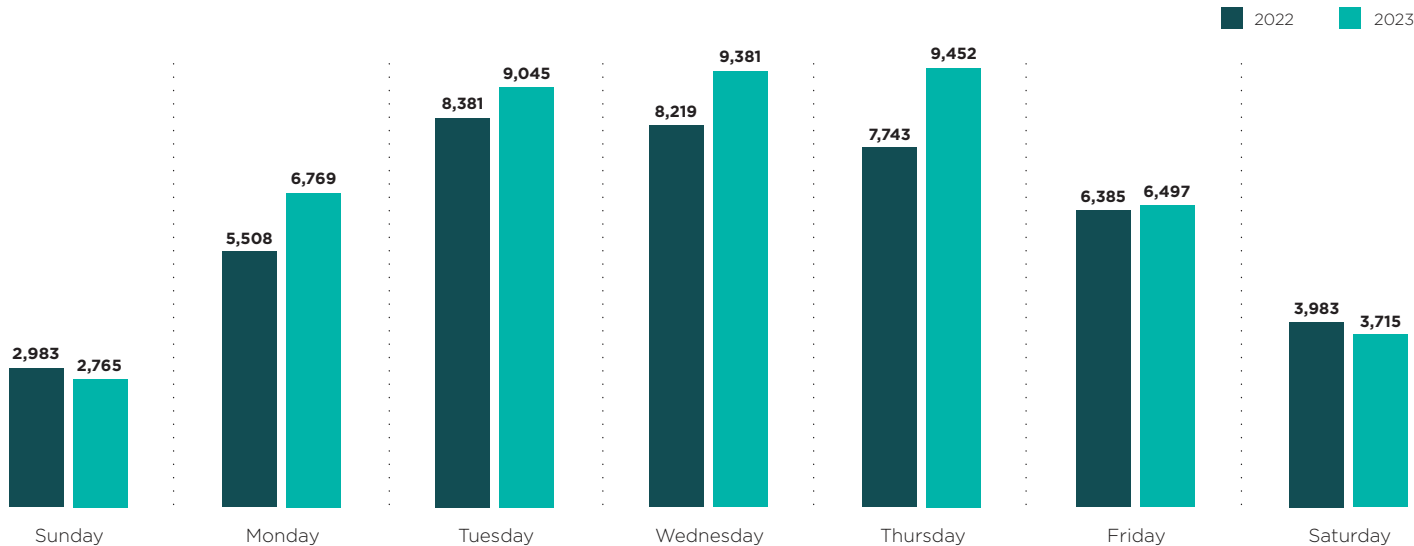
workers. Having the highest national percentage of workers who live within two miles of their downtown jobs, also contributed significantly to our worker return rate (Figure 7). Overall, the return of residents, workers and visitors has been steadily trending upward for the last three and a half years, showing no signs of having reached any plateau. Pedestrian volumes have also increased in every geographic section of the downtown and, while perceptions of public safety remain very important, the data strongly suggests that the return of workers is impacted far more by the industry they work in and by the length of their daily commute.

**Figure 5:** Non-Resident Workers by Area of Center City as a Percentage of 2019  
 Non-resident worker recovery in the East Market district reached 81% in Q3 2023.



Source: Placer.ai

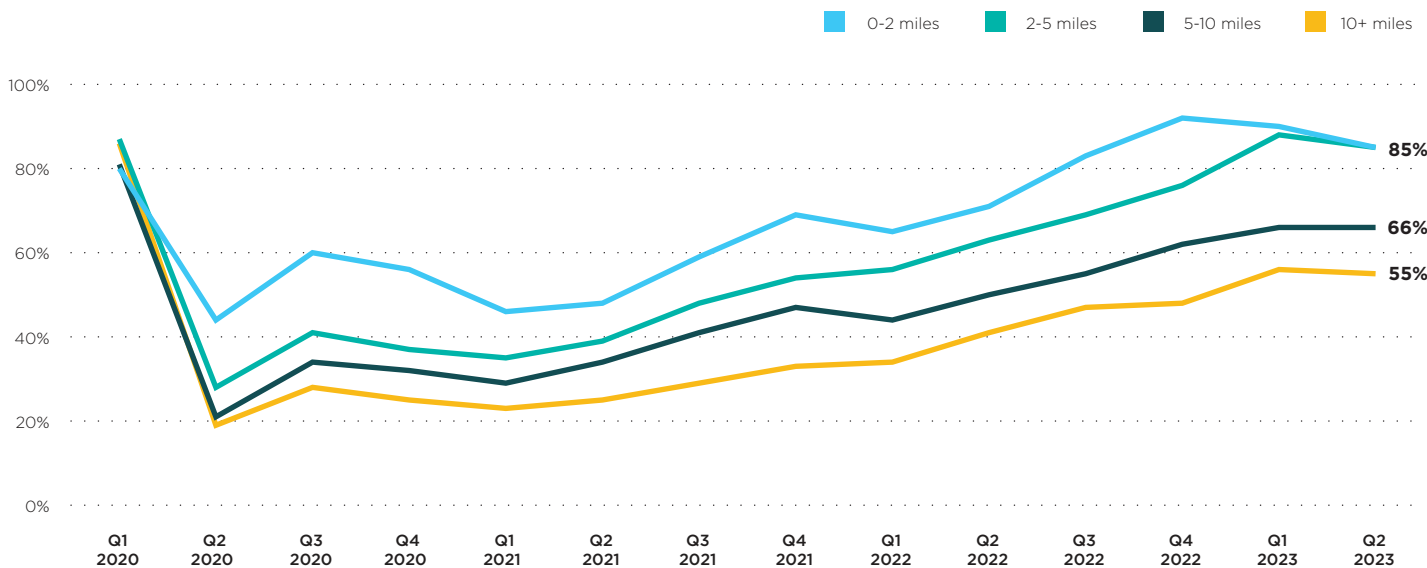
**Figure 6:** 1700 JFK Boulevard, Average Daily Pedestrians, Four Weeks Ended November 2



Source: Placer.ai

Center City’s strong concentration of downtown residents who work downtown has significantly enhanced return-to-work trends.

**Figure 7:** Philadelphia Core Downtown Non-Resident Worker Recovery Rate by Commuting Distance



Source: Placer.ai



**CENTER CITY**  
DISTRICT

CENTRAL PHILADELPHIA  
DEVELOPMENT  
CORPORATION

660 Chestnut Street, Philadelphia, PA 19106 | 215.440.5500

[CENTERCITYPHILA.ORG](http://CENTERCITYPHILA.ORG)