Recovery: Are We There Yet?

Is this the new normal? In November 2022, pedestrian volumes in Center City from Vine Street to South Street, river to river, based on anonymized Placer.AI cellphone data, put tourists, visitors to cultural institutions, convention attendees and those who come to shop, dine and access services at 73% of November 2019 levels. With more people living here than three years ago, residents registered at 126%. Workers logged in at 55% of 2019 volumes. The average of all three suggests a 73.5% recovery rate.

CCD also deploys sidewalks sensors at 11 locations within the dense commercial core: 8th to 19th Street, John F. Kennedy Boulevard to Walnut Street. These show a recovery rate of just over 80%. Three pairs of sensors, positioned in the office district (1700 block of JFK Boulevard, 1800 block of Market Street and 1600 block of Market) recorded volumes up 115% from January 2022, peaking on Tuesdays, Wednesdays and Thursdays.1

Talk with major employers and some speculate, often with resignation, that things may have reached a plateau. They offer anecdotes about wandering through empty offices on Mondays and Fridays. Brokers report many lease renewals taking 20% to 30% less space. Formal vacancy counts are up from 12% in 2019 to 18.4% in Q3 2022, even as life sciences expand and small new firms move in.

As good as it gets?
Technology now enables viable alternatives to convene staff from diverse locations, eliminating travel time and the need to dress for success. Quick to draw conclusions, some journalists proclaim the office is dead, while speculating that a new algorithm will digitally simulate serendipity at the water cooler.

No doubt, there are repetitive and routine functions that can be performed from anywhere, as in call centers where everyone sticks to the script. Zoom, Webex and Teams are far less effective in picking up unspoken cues of body language or replicating random conversations in the corridor or on sidewalks that free you from the digital box, disrupt routine and spark new ideas. Most agree that offices remain the best setting for collaboration, innovation and mentoring; but how frequently? How much office space do we need downtown?

A surging cottage industry of research on work from home and return to office comes with its own abbreviations (WFH and RTO). The most quoted is a Stanford University team conducting national and international surveys. Their findings from October 2022, across all industries, provide a helpful corrective to one-off news stories. Only 13.6% of full-time, wage and salaried employees, they conclude, are completely remote; 57% are on site; 29.4% occupy the middle ground of hybrid.2 Some professions that tend to cluster in downtowns more easily lend themselves to remote: information technology employees average 2.5 days per week WFH; finance and insurance, 2.18 days; professional and business services, 1.99 days. Employees on site at least four days per week are in manufacturing, retail, hospitality and food services, transportation, warehousing and personal services — suggesting a bifurcation in work experience by sector and educational level.

An Economic Innovation Group study finds patterns of remote work across the United States are far from uniform, shaped by two major variables: the structure of local industry and the length of pre-pandemic commutes.3 The greater the

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1 These November counts represent a distinct increase over October volumes as reported in Center City Pedestrian Vitality, https://centercityphila.org/research-reports/center-city-pedestrian-counts-report-november-2022

2 Work from Home Research, https://wfhresearch.com/. The October report shows a modest, but distinct increase in RTO from their summer report.
local concentration of occupations that lend themselves to remote work — primarily tech, finance and health professionals. Although some employers now struggle to attract workers, there were also substantial differences between industries, with child care, education and certain locational businesses experiencing more robust growth.

More is in Our Control Than We Think

It is often said, and it holds true, that a great resignation is not about work — it may better describe the passivity and fatalism of those who feel powerless against trends and their control. To be sure, the pandemic had profound consequences, but it also offered greater flexibility in time management, expanded personal freedom and saw on-site commuting and grooming. Yet, this view is far from universal. Some dislike remote work and miss daily interactions with coworkers. Over time, Brookings researchers suggest, those who seek a more collaborative work experience will move back into office arrangements more closely or pre-pandemic working arrangements. More significantly, Brookings analysts conclude this phenomenon allows people to work out on valuable mentoring, networking and on-the-job learning.

The implications for cities, they caution, are more worrisome. WFH has already reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave. wfh has reduced the tax base, diminished property values and city coffers. While this is currently masked by American Rescue Plan funds. On the hopeful front, the authors see a role for local government to recalibrate an attractive mix of taxes and public services. Cities that respond with efficient management and sound policies will benefit from the economic shock wave.

The Consequences of Inaction: After 30 years of rebuilding, there were more than 311,000 jobs in Center City in 2019 — 63% of those jobs required less than college degree and 33% only high school diploma. The economy of Center City in 2019 was 63% blue-collar and 33% white-collar. The more we come together, the more productive we are. This simultaneously creates new opportunities for workers to choose between firms. Vibrant downtowns and campuses remain the incubators for innovation and creation of new firms. The last three years were profoundly disruptive as people have reconsidered where they live and work, while firms rethink the role and purpose of the office. From centralized offices to remote work, from retail theft and a citywide epidemic of gun violence that remains appalling high. But there are too many problems within our control — amenable to a two-handed approach that brings law enforcement together with social services and job opportunities. In the case of gun violence, this must be augmented with community leaders, local clergy and those with special peer credibility: the mothers of young men who were killed and men returning from prison. Other cities have success with this approach, termed focused deterrence, and expanded efforts are underway here that can live beyond the transition from mayor to mayor.

This does not mean we ignore or excuse crime. We need to simultaneously establish consequences for committing crimes with alternatives to incarceration, while also providing counseling, drug treatment, resources and job opportunities to reduce the conditions that generate crime.

To stay competitive, it’s best to proceed on two tracks simultaneously: maximizing returns on retail and attracting new firms to fill vacant space, while also reaffirming the amenities and land-use in the office districts, building on our twenty years of success in attracting diverse, inclusive, live- work downtown.

Paul R. Levy
President
playv@centercityphiladelphia.org

4 Civic Coalition to Save Lives, www.savephillylives.org
New In-Street Planters Improve Appearance and Safety

CCD recently completed the installation of in-street planters at 15th Street and JFK Boulevard. The new bike infrastructure and landscaping was created to enhance the appearance the office district and make one of the downtown’s high-traffic corridors more bicycle- and pedestrian-friendly, without affecting visibility for vehicles. The planters and greenery will be maintained by CCD. The project was implemented with the cooperation of PennDOT and the City of Philadelphia and the support of neighboring building owners, many of whom have funded sidewalk planters.

The Wintergarden at Dilworth Park

The popular Wintergarden on the Greenfield Lawn is back for its seventh holiday season at Dilworth Park. This verdant space in the heart of the city is free and open to the public from winter through spring. It features more than 100 varieties of native and pollinator plants, trees, and grasses, along with a festive arbor, animal topiaries and plenty of places to sit and enjoy the atmosphere after an ice skating session.

The Log Tunnel at Sister Cities Park

For the third year, a 150-year-old fallen silver maple tree has found a playful new purpose at Sister Cities Park. The tunnel log was an instant favorite with kids when we introduced it in fall 2020 after smoothing and sealing the interior for safety. We’ve added a colorful new play mat this year, making this limited-time amenity even more fun for children to explore.

Karl Tyler Promoted to Lead Role in CCD Cleaning Division

Long-time Center City District team member Karl Tyler has been promoted to the Director of Operations role for CCD’s cleaning operations.

Karl was a member of CCD’s original class of Community Service Representatives (CSRs) back in 1991 and worked for three years in the CSR program before joining our contracted cleaning operations in 1994, starting as a team supervisor. For the last decade, he has been managing all sidewalk cleaning crews. With the retirement of long-term operations manager Henry Hippert, Karl stepped into this role in May 2022.

If you see Karl in Center City, be sure to congratulate him on his 31-year commitment to the downtown and for his new leadership role at CCD.

Want to help enhance the vitality of Center City? Join our team.
Find job openings at centercityphila.org/jobs

Streetscape Improvements

Seasonal Favorites Return to CCD Parks
As pedestrian volumes on Center City sidewalks approach pre-pandemic levels and as more workers have returned to downtown offices, Center City streets are once again animated with people — residents, workers, visitors, and shoppers. Generous contributions to CCDF also support the Deck the Parks in partnership with Philadelphia’s arts and cultural organizations. Contributions to CCDF have installed more than 80 new planters with changing seasonal decorations, to support retail and office district recovery by making our streets more attractive.

These accomplishments would not have been possible without our corporate partners and contributors, whose generosity fosters the resurgence of Center City, and whose investments continue to support the Center City District Foundation over the past year. We appreciate the support of our corporate partners and contributors, whose generosity fosters the resurgence of Center City, and whose investments continue to support the Center City District Foundation over the past year.

Thank You For Your Support

To learn how you can contribute, visit supportccdf.org.

As pedestrian volumes on Center City sidewalks approach pre-pandemic levels and as more workers have returned to downtown offices, Center City streets are once again animated with people — residents, workers, visitors, and shoppers. Generous contributions to CCDF also support the Deck the Hall Light Show, highlighting Philadelphia’s historic City Hall throughout the holiday season and making skating in Downtown Center City a unique experience.

Additionally, the Foundation has enabled us to expand our Ambassadors of Hope homeless outreach program, a partnership with Project HOME and the Philadelphia Police Department, as well as deploy our new bicycle safety patrol teams.

A gift to the Center City District Foundation is a gift to all Philadelphians. Please use the enclosed envelope to make an impact today or give online at supportccdf.org.

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Welcome to Winter at Dilworth Park

**ONGOING**

- Deck the Hall Light Show
  presented by Independence Blue Cross
  Through January 1
  Daily, 5 p.m. – 9 p.m.

- Made in Philadelphia Holiday Market
  Through January 1
  Sunday - Thursday, 11 a.m. – 7 p.m.
  Fridays & Saturdays, 11 a.m. – 8 p.m.

- Cocktails and Cold Ones
  Through February 25
  Wednesdays, 5 p.m. – 7 p.m.

- College Nights
  presented by Temple University
  Through February 23
  Thursdays, 5:30 p.m. – 9 p.m.

- Rothman Orthopaedics Ice Rink
  & Rothman Orthopaedics Cabin
  Through February 26
  Daily, visit dilworthpark.org for hours

**COMING IN 2023**

- Lunar New Year Celebration
  presented by Temple University
  January 21
  Saturday, 9 p.m. – 7 p.m.

- Free in February
  presented by Rothman Orthopaedics
  February 6 – 21
  Mondays and Tuesdays

- Superhero Skate
  February 4
  Saturday, 1:30 p.m. – 3 p.m.

- Ice Festival
  February 10
  Saturday, 1 p.m. – 7 p.m.

**CHECK US OUT AT**
[CCDPARKS.ORG]

Host your next event at a CCD park!
For info about CCD park rentals, email rentals@centercityphila.org

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More Ways to Stay in the Loop

We’ve added new ways to learn about Center City and the CCD.

We recently created a brief video to summarize CCD’s mission and operations, from clean and safe to parks, events and marketing. Check out the video on the Center City District home page: centercityphila.org

Center City District’s first-ever blog launched this spring and continues to grow. Our latest posts include holiday itineraries for five downtown commercial corridors, with ideas for shopping, dining and entertainment. Whether you’re looking for things to do with the kids, or places to meet friends for cocktails, we’ve got you covered. Find all of the details at centercityphila.org/blog

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Stay connected to CCD on social media

- @centercitydistrict
- @centercitydistrict
- @ccdphila
- Center City District
- Center City District
Center City’s the place to be for holiday shopping, dining and entertainment

This Is How We Holiday
Be on the lookout for our new ad campaign highlighting the unique shopping, food and drink, and unique attractions in five Center City retail corridors: Midtown Village, Market East, Jewelers’ Row, Rittenhouse Row and the West Market/Parkway District.

Whether you’re sharing holiday traditions with the family, or enjoying some holiday cheer with friends, Center City offers a walkable, vibrant atmosphere accented by outdoor cafes, public spaces and seasonal decor. And with CCD’s daily cleaning, safety and outreach services, visitors can feel comfortable exploring all of the holiday experiences Center City has to offer.

Create an ideal day downtown by checking out our blogs with sample itineraries and suggested stops in five selected business corridors.
centercityphila.org/blog

Dinner and a Show
Dinner and a Show is a new CCD promotion that offers discounted tickets to select performances in some of the city’s most beloved arts and culture venues along the Avenue of the Arts. The initiative kicked off this fall in conjunction with Center City District Restaurant Week and continues through the end of the year.

Participating venues for Dinner and a Show include the Kimmel Cultural Campus, The Philadelphia Orchestra, Philadelphia Ballet, and the Philly Pops. Visit our website for details on shows, dates and venues offering discounts during the holiday season.
centercityphila.org/dinner-show

Center City Philadelphia Developments 2022
An in-depth report on current and upcoming major real estate projects in Center City. The report includes a map and full-color photos or renderings and project descriptions for all 45 major developments in Center City Philadelphia, categorized by type. Accompanying the report is an interactive map featuring all of the developments found within the publication.

Center City Philadelphia Retail 2022
Center City retailers, restaurants, and commercial property owners have responded to a series of challenges in the last three years with creativity and resilience. The return of conventions, tourism, the reopening of all cultural institutions, the attraction of shoppers from across the city and region and the continuing growth of Philadelphia’s downtown residential population have combined to drive two consecutive years of positive net openings of restaurants and retailers within the district. Office workers have been gradually returning, at just over 50% of pre-pandemic levels in October, with hybrid work patterns somewhat limiting their recurring purchases downtown for the time being. Center City is on course to achieve its pre-pandemic 89% occupancy rate as re-openings and new arrivals have increased occupancy to 80.5% with retail brokers reporting continued tenant inquiries, tours, and active lease negotiations.

Center City Pedestrian Vitality, November 2022
Pedestrian volumes in Center City at the end of October 2022 reached 77% of the October 2019 level, according to data from Center City District sensors measuring pedestrian volumes at 11 locations within the dense commercial core of Center City — from 8th Street to 19th Street, and from JFK Boulevard to Walnut Street.

Read and download CCD reports at centercityphila.org/research-reports

The Latest Reports from CCD/CPDC

Center City District researches, produces and distributes in-depth reports year-round about the office, retail and residential sectors. The reports assist commercial brokers, property owners, developers, the City of Philadelphia, economic development agencies and our Central Philadelphia Development Corporation (CPDC) membership to attract businesses from outside the region, encourage new startups, retain businesses within Center City and expand the residential population.

Center City Philadelphia Developments 2022
Center City Philadelphia Retail 2022
Center City Pedestrian Vitality, November 2022

To learn more about CPDC and how to join, visit centercityphila.org/cpdc or contact CPDC Executive Director Prema Gupta at pgupta@centercityphila.org
Center City Digest is a publication of the Center City District (CCD), a private-sector-sponsored municipal authority committed to providing supplemental services that make Philadelphia’s downtown clean, safe and attractive; and of Central Philadelphia Development Corporation (CPDC), with more than 40 years of private-sector commitment to the revitalization of downtown Philadelphia.

Center City District
660 Chestnut Street
Philadelphia, PA 19106
CenterCityPhila.org

Restaurant Week  January 15–28, 2023

Give the gift of Restaurant Week with gift cards from Center City restaurants.