



Delaware River  
**WATERFRONT**  
Corporation

SUMMER 2017 ON THE WATERFRONT

# EXECUTIVE SUMMARY

## OVERVIEW OF PROJECT

This project was undertaken with the intent to determine concrete, data-driven conclusions about the use of the Penn's Landing parks along the Delaware River Waterfront. The popularity of these parks during the summer is clear through a simple visit, but how are these observations supported by data? Are the parks being used by all Philadelphians? What takeaways can inform future interventions, improvements, and similar projects? Stemming from extensive work with the Social Impact Collaborative and thinking about how data could be more effectively used within the DRWC organization, this project specifically attempts to answer the following questions:

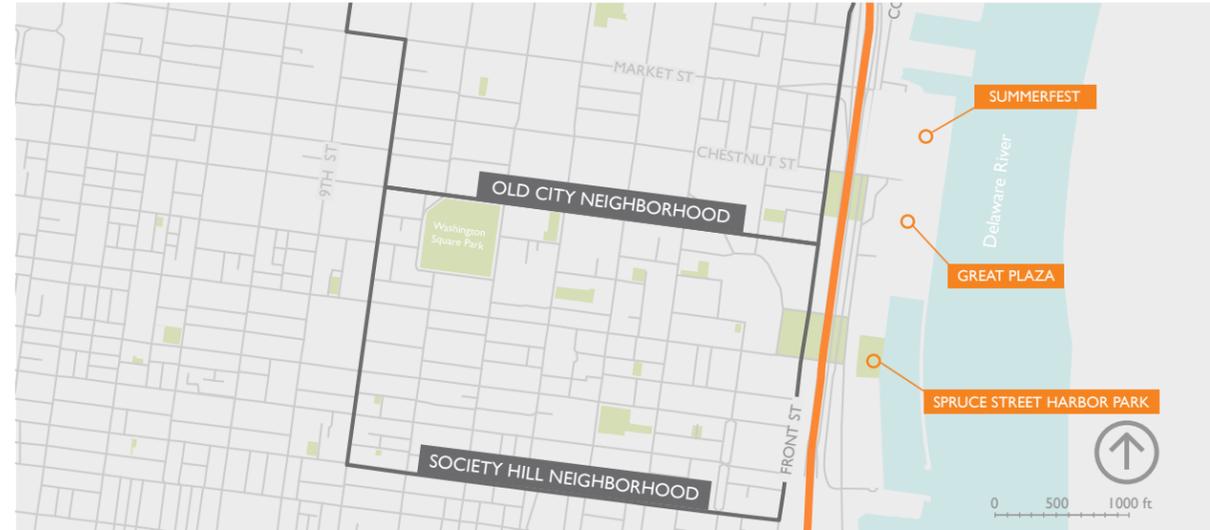
**How are these three parks along the waterfront achieving DRWC's desired goals and outcomes for the area?**

**How are trends in the parks changing over time?**

**Are the parks at Penn's Landing accessible to all Philadelphians and are they integrated into the fabric of the city?**

This report interprets the results of roughly four months of data collection, over a period from late May to early October, 2017. This includes data from the mid-July Waterfront Arts Open House event where extensive surveying was done, although the full set of survey questions was not asked.

Figure 1: Locator map for three parks in summer 2017 data collection: Summerfest, Spruce Street Harbor Park, Great Plaza



## METHODOLOGY

Data was collected from three parks along the Central Delaware River Waterfront: Spruce Street Harbor Park, Summerfest, and Great Plaza. The majority of data was collected through in-person surveys that were distributed verbally through the interception of park visitors by two surveyors. These surveys aim to capture a representative population of park visitors and were intentionally collected to reflect a broad range of times, days of the week, areas of the parks, and programmed events.

Data for this project was also collected through postcard surveys that were completed by visitors at the information desk at Spruce Street Harbor Park and in the skate rental lodge at Summerfest. The in-person survey and the postcard survey were made up of largely

the same questions regarding visitors' experiences at the parks. A copy of the verbal survey is included in the Appendix to this report.

In addition to visitor surveys, a significant amount of observational data was collected. For each survey session, people counts were obtained at the parks. These counts were broken down into smaller park zones to get a sense of distribution within the space. A map of the zones for Spruce Street Harbor park is included in the Appendix to this report. Additional observations, including weather conditions, any events or programming taking place, the number of open vendors, and the occupancy rate of hammocks, were also recorded.

Figure 2: Key takeaways from the summer data collection



## KEY TAKEAWAYS

### 1. People Really Love the Water!

Being near the water, spending time outside, and enjoying the views were overwhelmingly praised as reasons to come to the waterfront. 24% of respondents noted the location and view as their favorite thing about the waterfront. DRWC should celebrate this natural asset in all of its parks and remember that it is the core of what makes this area so special and these parks so popular.

### 2. Driving is Down, Walking is Up

In 2017, fewer visitors are driving to the waterfront, with more walking and using ride sharing services. Many visitors who noted they felt less than very safe getting to the park, however, made comments about the difficulty of crossing Christopher Columbus Boulevard. DRWC

should improve the pedestrian infrastructure near the parks to ensure the safety and accessibility of the Penn's Landing parks by foot.

### 3. Word of Mouth is Invaluable

Many people hear about the park through family, friends, or other 'word of mouth' sources. DRWC should keep in mind that these non-traditional advertising sources are most successful and should maintain fresh and exciting programming to keep visitors talking about the parks.

### 4. No Defined Neighborhood

There is no real consensus on what neighborhood the parks at Penn's Landing belong to. Visitors from

Philadelphia are more likely to connect the parks to neighborhoods inland, such as Old City, while more visitors from outside the city see Penn's Landing as its own, separate area of the city. Some visitors don't see the area as part of any neighborhood at all. This highlights the need to make better connections back to the city and to establish a strong sense of place along the waterfront.

## 5. Diversity is Key at the Waterfront

Diversity is celebrated by visitors at the Penn's Landing parks, particularly the diversity of people, things to do, food to eat, and programming. While the parks entertain a wide variety of ages, races, and levels of education, there are distinct demographic differences between the parks and overall patterns show higher percentages of highly-educated, White visitors compared to the makeup of Philadelphia as a whole. DRWC should encourage and increase this diversity, working to bring more visitors with different backgrounds to the waterfront and to expand the reach of the parks.

## 6. Good Programming Ups Revenues

The parks along the waterfront continue to generate significant revenue and have positive economic impacts for the city as a whole. 2017 saw dramatic revenue increases, particularly at Summerfest in response to the introduction of the Midway where annual revenues increased 55% between 2016 and 2017. DRWC should continue to introduce creative and diverse programming across its parks to strengthen the identity of the waterfront and increase the revenue potential of the Penn's Landing area.

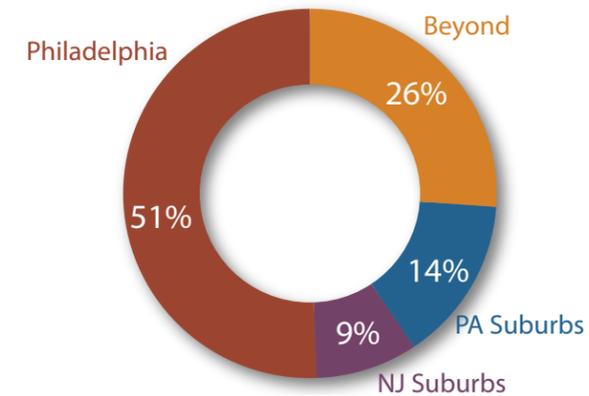
# WHO IS VISITING THE WATERFRONT?

## WHERE DO VISITORS COME FROM?

Fifty-one percent of visitors surveyed this summer at the Delaware River Waterfront live in the city of Philadelphia. Philadelphia visitors come from many areas throughout the city as well, evidenced by the fact that 98% of Philadelphia zip codes are represented in the 2017 survey data. Noticeably lacking from this data is the zip code 19136 in Northeast Philadelphia. Further analysis should be done to look into why people from this area of the city might be underrepresented at the park.

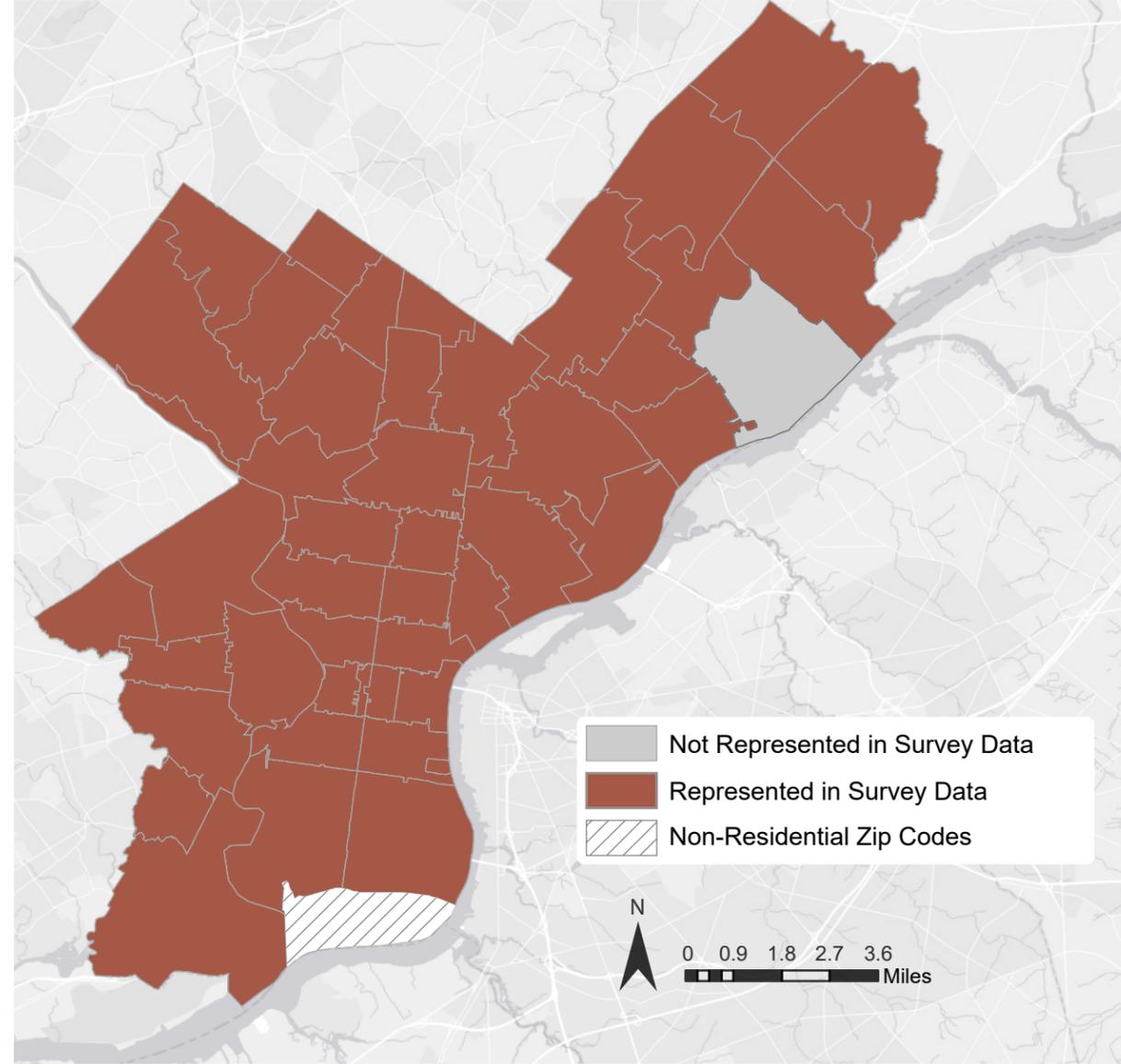
A diverse array of Philadelphians visited the waterfront this summer, but 47% of visitors surveyed were coming from outside the city. This means that the Waterfront can serve as a *regional* attraction, popular as a "day trip" destination for residents of Greater Philadelphia and tourists. Overall, visitors surveyed in 2017 represented 28 states and 11 different countries.

Figure 3: Breakdown of where park visitors are coming from



(based on 582 responses from visitors who noted their zip code of residence)

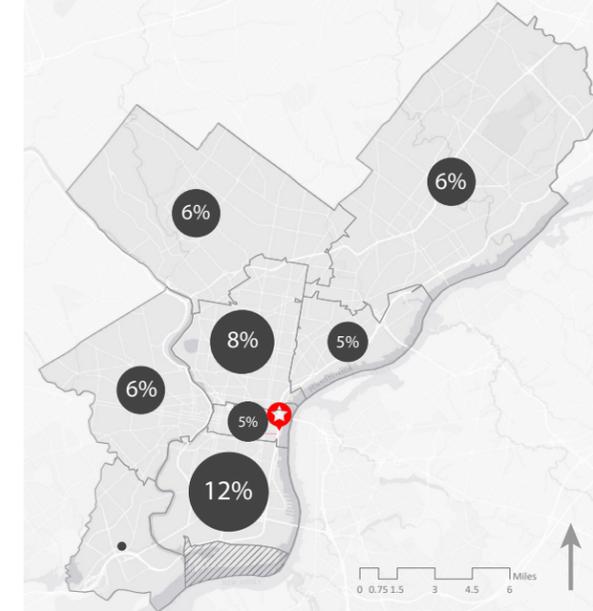
Figure 4: Visitors surveyed this summer represent 98% of Philadelphia's zip codes



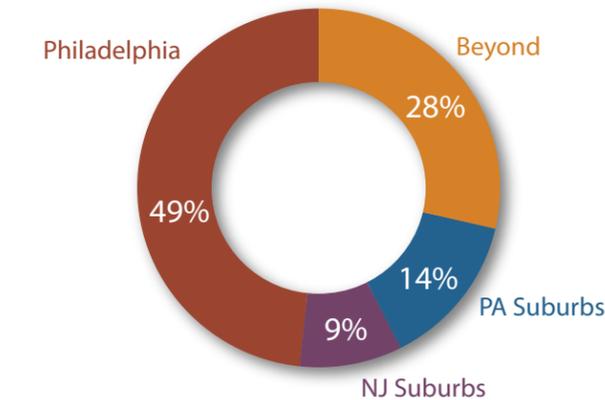
(based on 588 responses from visitors who noted their zip code of residence)

## HOW DOES THIS COMPARE BETWEEN PARKS?

### Spruce Street Harbor Park

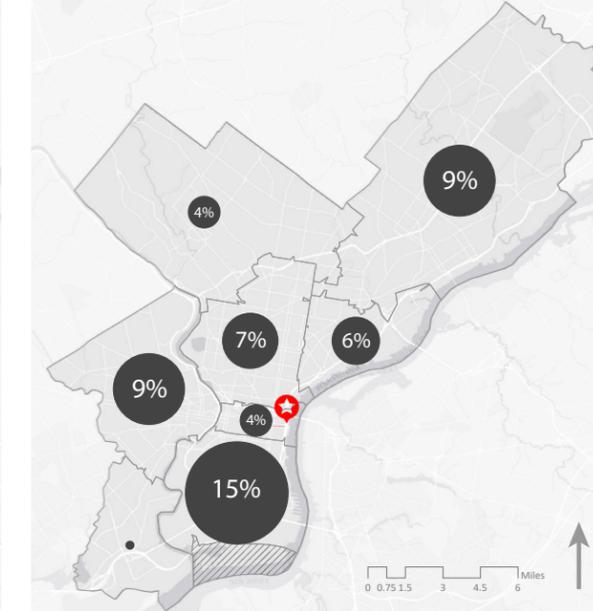


Figures 5 & 6: Distribution of Spruce Street Harbor Park visitors by Philadelphia region and by broader geographic region

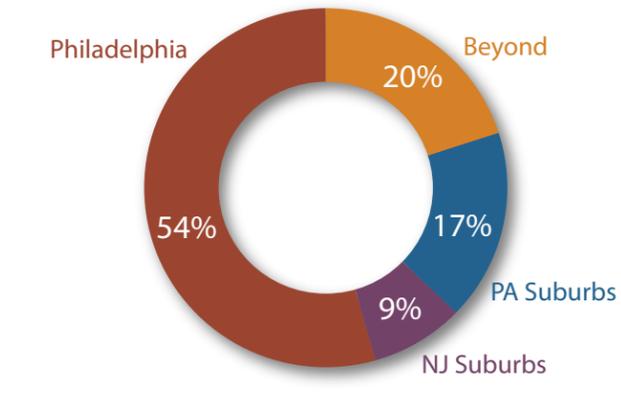


(based on 422 responses from visitors who noted their zip code of residence)

### Summerfest

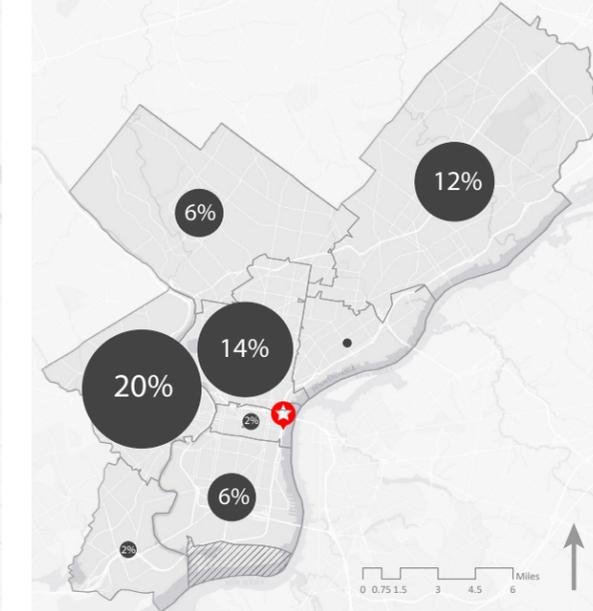


Figures 7 & 8: Distribution of Summerfest visitors by Philadelphia region and by broader geographic region

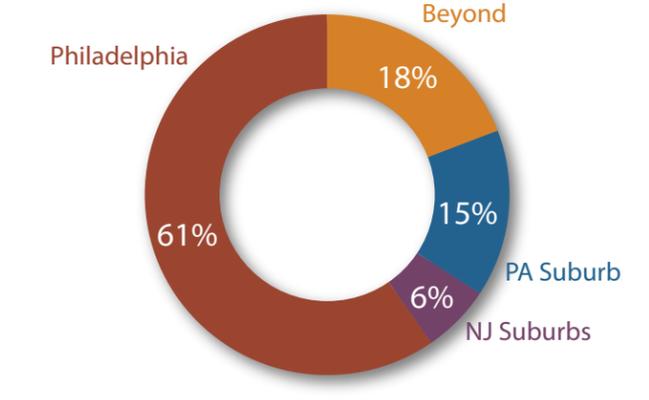


(based on 94 responses from visitors who noted their zip code of residence)

### Great Plaza



Figures 9 & 10: Distribution of Great Plaza visitors by Philadelphia region and by broader geographic region



(based on 66 responses from visitors who noted their zip code of residence)

# WHO IS VISITING THE WATERFRONT? (CONT.)

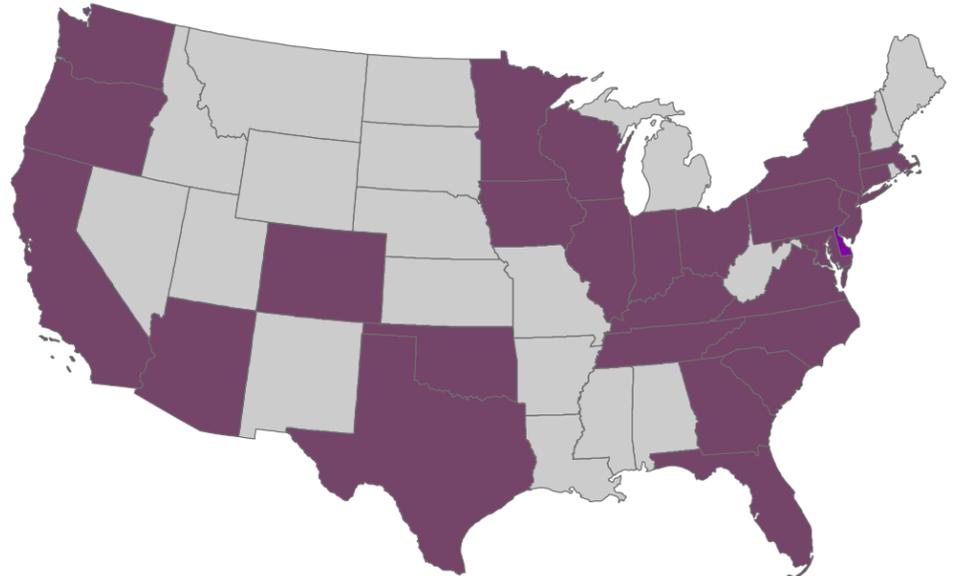
## GEOGRAPHIC DIVERSITY

The waterfront receives visitors from all over the country and the world. This summer, visitors surveyed at the parks came from 24 states and 11 different countries. Many of these visitors cited Spruce Street Harbor Park and the Delaware River Waterfront as major stops in their Philadelphia sightseeing.

A diverse range of education levels and ages visit the waterfront. A few recommendations should be considered for next season's data collection, however. Including a "Mixed" category for groups spanning multiple age bins creates data that particularly underrepresents people in the 34-50 and under 18 age ranges (mostly families). Additionally, surveyors found that women answer demographics questions more often than men, resulting in an underrepresented group of male visitors.

- UNITED KINGDOM
- SPAIN
- SWITZERLAND
- NORWAY
- IRELAND
- HUNGARY
- GERMANY
- FRANCE
- CZECH REPUBLIC
- CROATIA
- BRAZIL

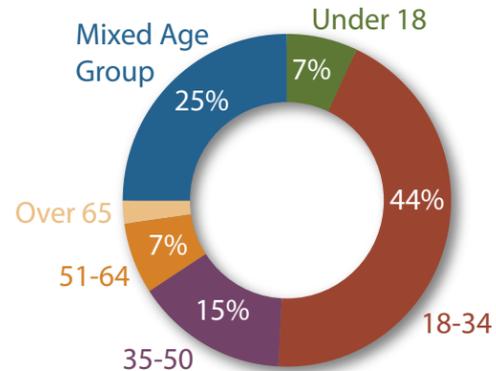
Figure 11: Visitors surveyed this summer came from 28 different US states



Legend:  
 Not Represented in Survey Data (Light Gray)  
 Represented in Survey Data (Purple)

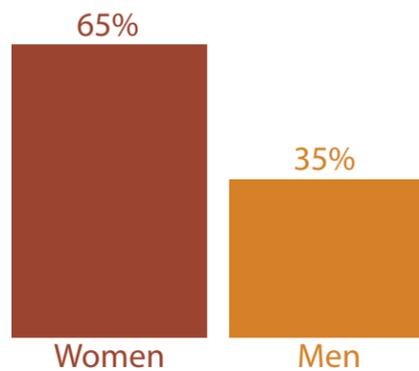
(based on 588 responses from visitors who provided their home zip code)

Figure 12: Breakdown of visitors by age



(based on 474 responses from visitors who provided their age)

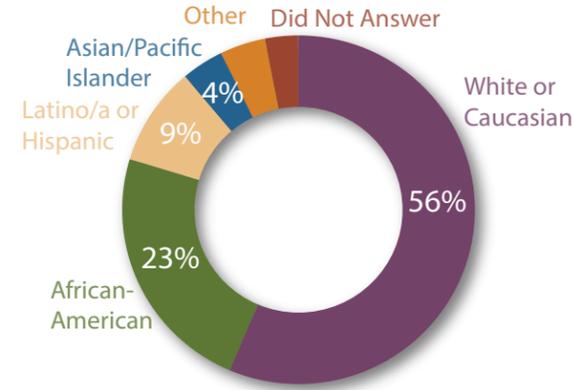
Figure 13: Breakdown of visitors by gender



(based on 498 responses from visitors who provided their home zip code)

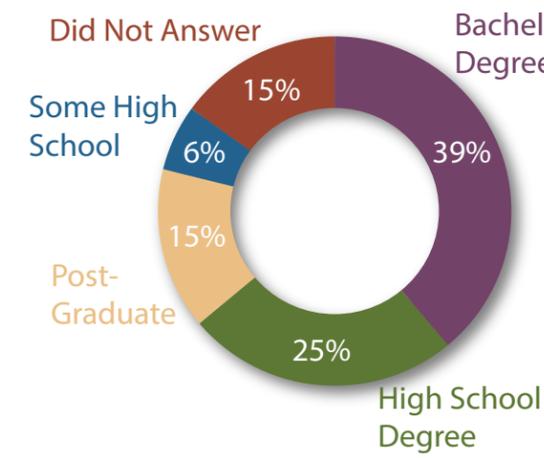
## RACE AND ETHNICITY AND EDUCATION

Figure 14: Race and ethnicity across all parks



(based on 506 responses from visitors who provided their race/ethnicity)

Figure 15: Breakdown of visitors by highest level of education

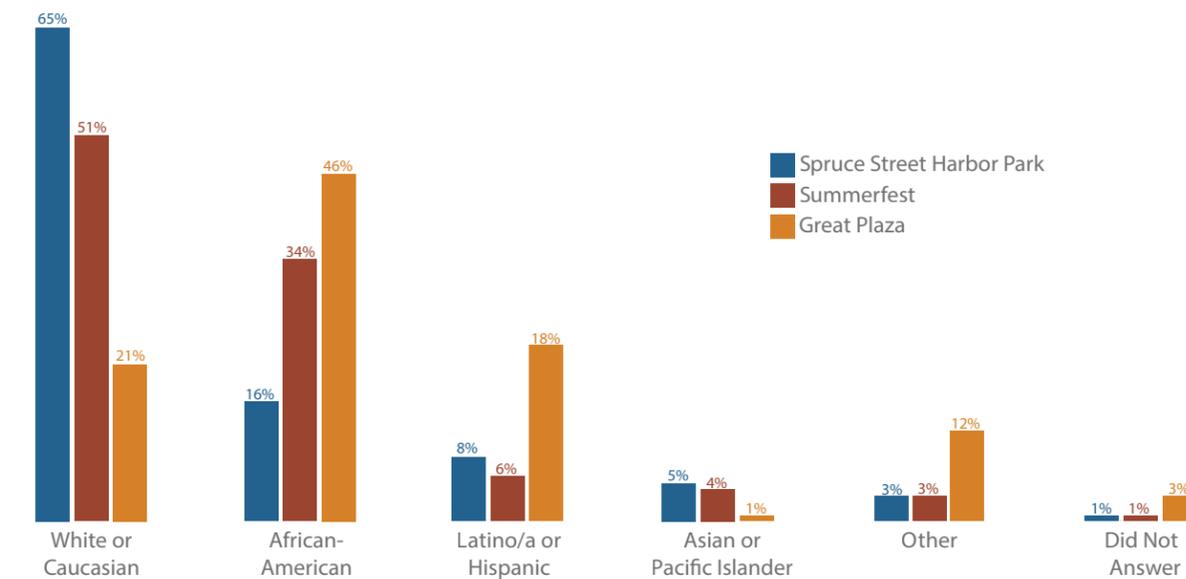


(based on 423 responses from visitors who provided their highest level of education)

Just over half of visitors surveyed at the parks are White or Caucasian, compared to 42% of residents citywide. Almost 40% of waterfront visitors have a Bachelor's Degree and 15% have a Post-Graduate Degree, compared to citywide rates of only 15% and 11%, respectively.

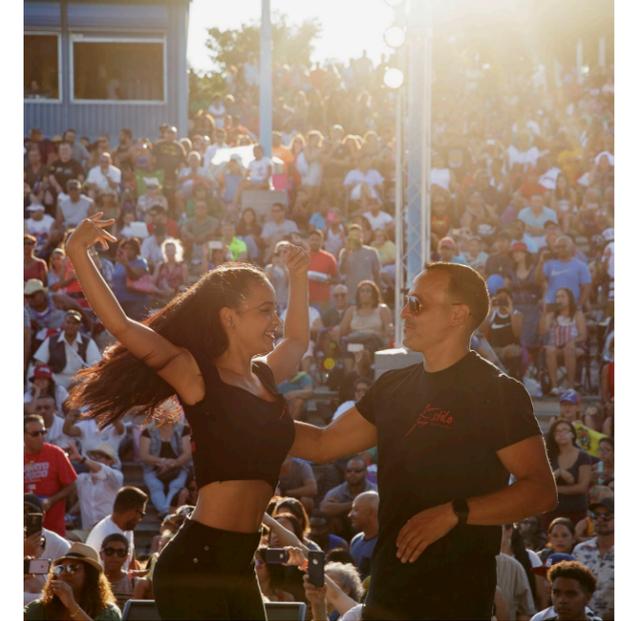
Notably, there are distinct demographic patterns between the different parks. Spruce Street Harbor Park tends to draw a greater percentage of White visitors compared to the other parks. Patterns at the Great Plaza are the opposite, with a much higher make-up of African-American and Latino/a or Hispanic visitors. This is likely partially due to the nature of programming at the Great Plaza over the summer that included multicultural events such as the Hispanic Fiesta.

Figure 16: Race and ethnicity by park



(based on 506 responses from visitors who provided their race/ethnicity)

Figure 17: Hispanic Fiesta at the Great Plaza

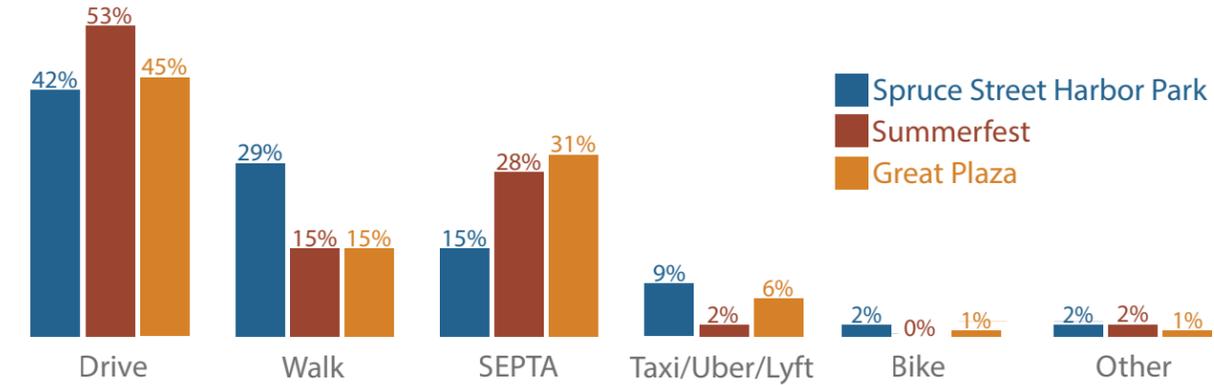


# HOW ARE VISITORS GETTING TO THE PARKS?

## TRANSPORTATION PATTERNS DIFFER BETWEEN PARKS

Transportation patterns are noticeably different between the three parks. More visitors drive to Summerfest than to Spruce Street Harbor Park or Great Plaza. Spruce Street Harbor Park receives more pedestrian traffic than either of the other parks and is most visible park from Christopher Columbus Boulevard. Its situation adjacent to the major thoroughfare may also contribute to its relatively high rate of rideshare use, as Harbor Park is easier for drivers to locate and pick up riders. Summerfest and Great Plaza visitor data showed a preference for public transit through SEPTA. Survey data depicting low bike ridership rates felt inconsistent with surveyor observations of crowded bike racks, especially at Harbor Park, and bike counts should be incorporated into next season's data collection.

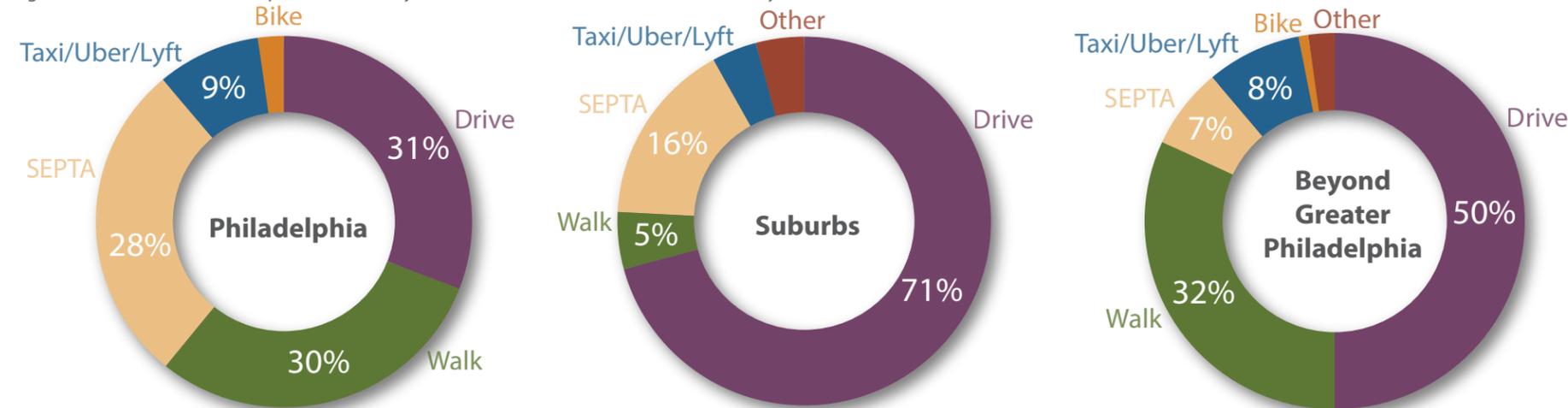
Figure 18: Breakdown of how people are getting to each of the waterfront parks in 2017



(based on 507 responses from visitors who noted their method of transportation)

## TRANSPORTATION PATTERNS ALSO DIFFER DEPENDING ON WHERE VISITORS ARE COMING FROM

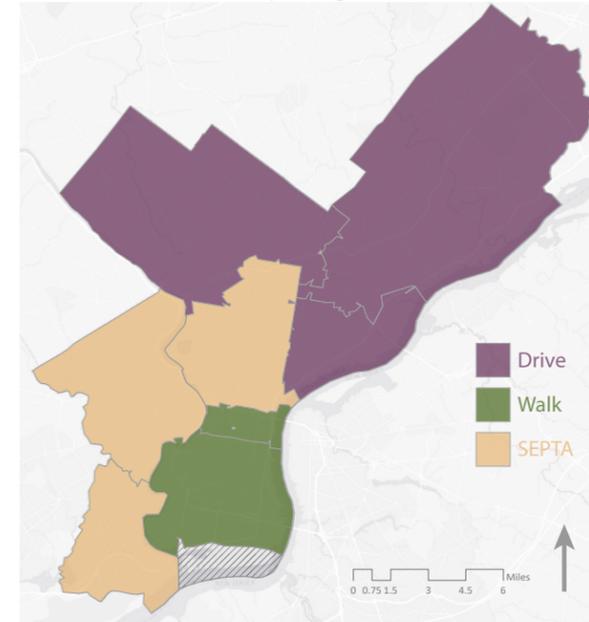
Figure 19: Visitors from Philadelphia are less likely to drive than visitors from outside of the city



(based on 499 responses from visitors who noted their zip code and method of transportation)

## ...AND BY PHILADELPHIA REGION

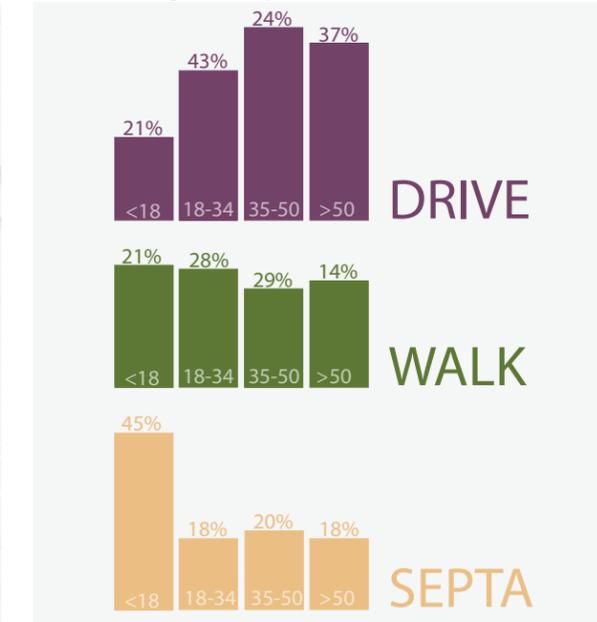
Figure 20: The most common transportation method used by visitors from each Philadelphia region



(based on 297 responses from Philly visitors who noted their transportation mode)

## ...AND BY AGE

Figure 21: Percent of each age group that drove, walked or took SEPTA to get to the parks



(based on 346 responses from visitors who noted their age & transportation mode)

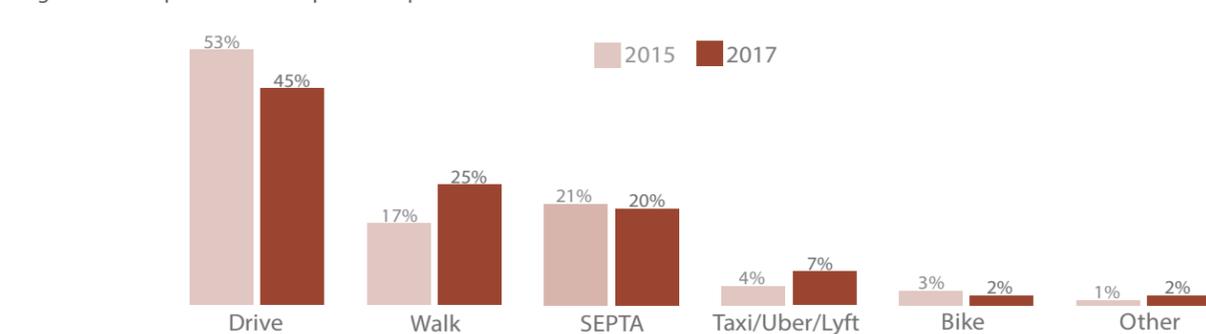
Where visitors are coming from affects how they get to the park. Visitors from Northeast Philly and Northwest Philly tend to drive to the parks, visitors from Center City and South Philly mostly walk to the park, and visitors from North Philly, West Philly, and Southwest Philly tend to take SEPTA. Age also has an impact on transportation modes. Visitors under 18 are less likely to drive and are more likely to take SEPTA. Older visitors, especially in the 35-50 age group, are more inclined to drive to the parks.

Transportation patterns have changed noticeably between 2015 and 2017. Visitors coming to the parks by car have decreased while walkers have increased. The use of ride hailing services has particularly caught on among millennial visitors (aged 18-34) at Harbor Park, 12% of whom reported using Uber, Lyft, or Taxi to get there. Overall patterns of where visitors are coming from are similar between 2015 and 2017. Since transportation patterns have changed, however, the reduction in driving and increase in walking could indicate changes in visitor behavior and a growing sense of the waterfront's accessibility.

The data shows that visitors biking to the parks have decreased in number, but we believe that bikers may be underrepresented in the 2017 data. Efforts to correct this next season should include counting the number of bikes parked at the bike racks as well as examination of Indego Bike Share data for nearby stations.

## HOW HAVE TRANSPORTATION PATTERNS CHANGED SINCE 2015?

Figure 22: Comparison of transportation patterns in 2015 and 2017



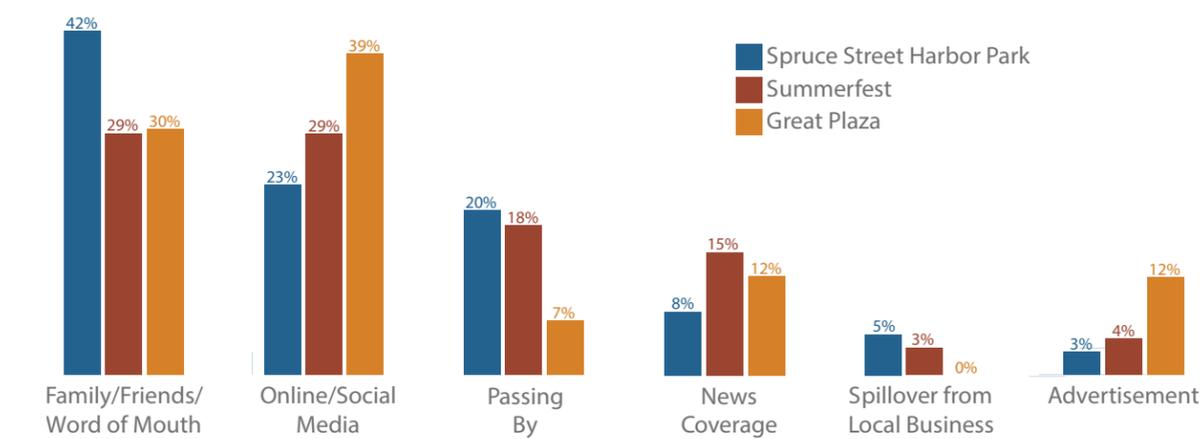
(based on 1336 responses from visitors who noted their method of transportation)

# HOW DO VISITORS HEAR ABOUT PARKS AND EVENTS?

## HOW DOES THIS VARY BETWEEN PARKS?

This question was asked to understand the impact of DRWC's communications efforts on people's awareness of waterfront parks and events. Visitors hear about the parks and events most frequently through word of mouth and social media channels. Visitors to Great Plaza are more likely to look at the DRWC website for event schedules, find event information posted on social media, or see a particular event advertisement. Foot and vehicle traffic along Christopher Columbus Boulevard may have contributed to the high number of respondents who learned about the parks from passing by. Future research should seek to explore how to integrate an extended demographic analysis of DRWC's communication platforms to communicate more efficiently with particular communities.

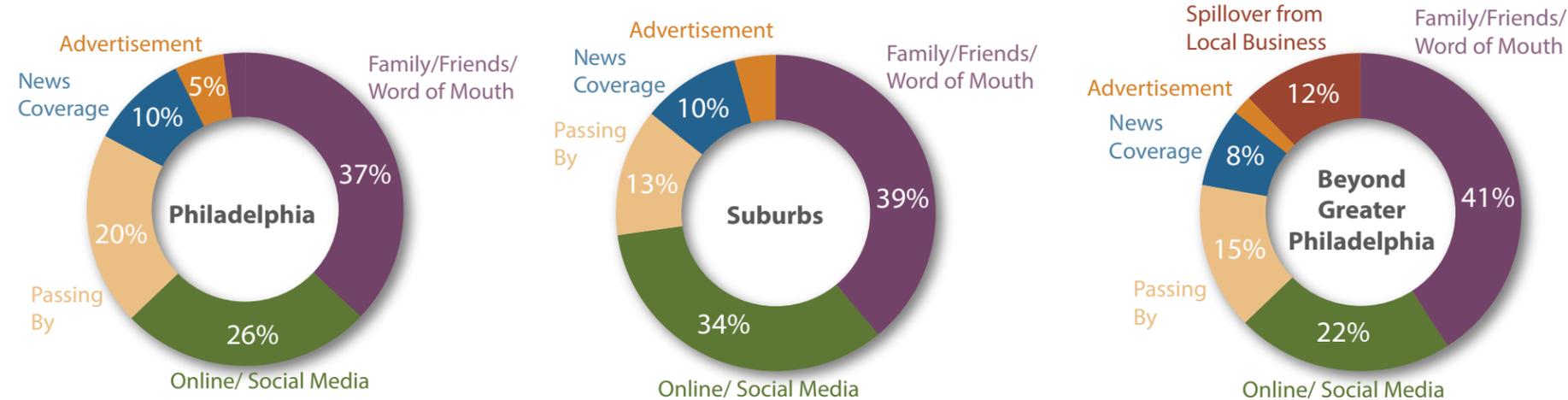
Figure 23: How people heard varies by park



(based on 504 responses from visitors who noted their zip code and method of transportation)

## DOES HOW PEOPLE HEAR CHANGE DEPENDING ON WHERE VISITORS ARE COMING FROM?

Figure 24: How people heard about the parks changes depending on where visitors are coming from

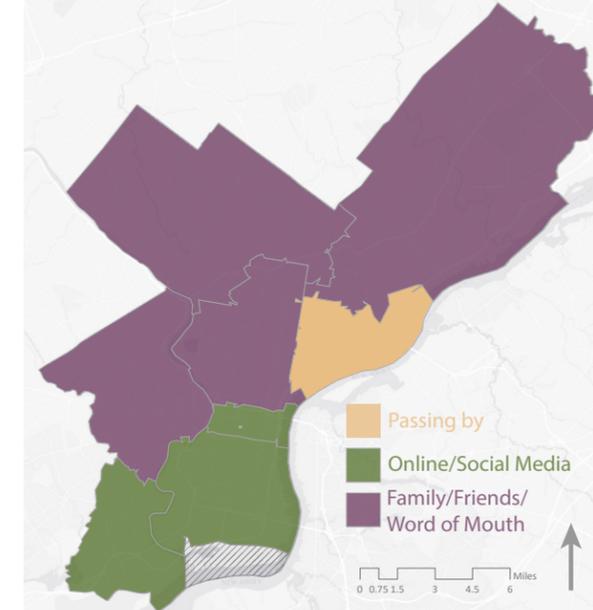


(based on 496 responses from visitors who noted their zip code and how they heard about the parks)

## ARE METHODS OF COMMUNICATION INFLUENCED BY PLACE OR DEMOGRAPHIC?

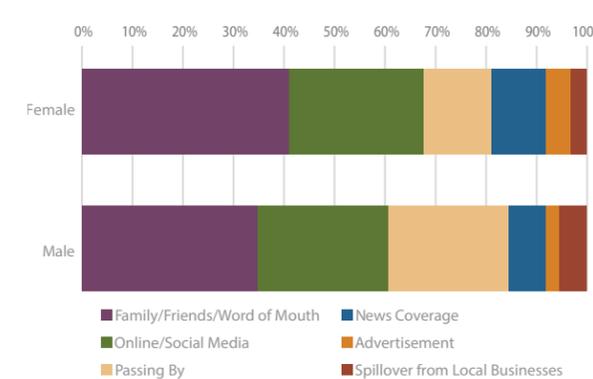
### PHILADELPHIA REGION

Figures 25 & 26: The most common way visitors heard about the parks in each Philadelphia region & Breakdown by Gender



(based on 259 responses from residents who noted their zip code & how they heard)

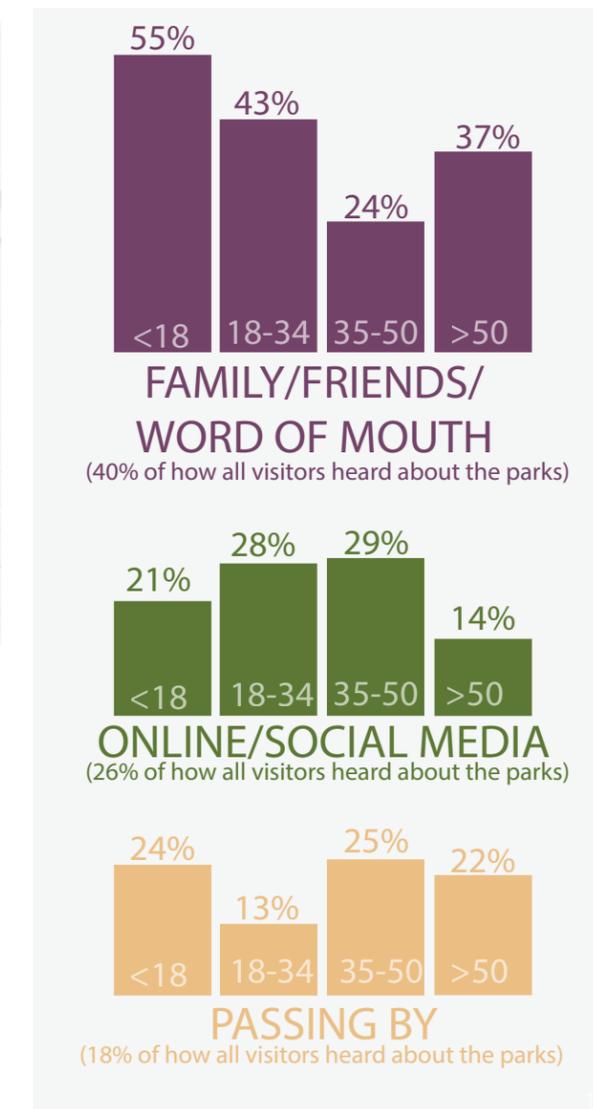
### GENDER



(based on 495 responses from visitors who noted their gender & how they heard)

### AGE

Figure 27: How visitors hear about the parks differs by age



(based on 345 responses from visitors who noted their age & how they heard)

Initial survey analysis found that factors of age and residential geography were most influential on how individuals heard of the parks. Word of mouth was the most frequent response for visitors under 18, between 18 and 34, and over 50. Responses from visitors aged 35 to 50 were more evenly distributed between online/social media, word of mouth, and passing by. Adults most frequently learned about waterfront parks or events through social media, while respondents 18 and below said they first heard about the park from someone else talking about it in person. Visitors over 50 were more likely to hear through word of mouth or passing by than through social media.

A difficult element in distinguishing successful methods of communication is that so many of these sources overlap. In responding, visitors might consider a friend posting to social media to mean that they heard about the parks via word of mouth. Some might see an online article as news coverage, but if they found it through the news outlet's social media page, it could be considered social media. The groupings of these communications methods should be re-evaluated for next season's data collection to facilitate clearer, more concrete conclusions.

Individual mode choice and trip origin appear to be important factors in determining who is most likely to pass by and discover the waterfront, since Philadelphians and tourists, who were the least likely to arrive by car, were also the cohorts most likely to pass by and stumble upon the parks.

# WHY DO VISITORS COME TO THE WATERFRONT?

## HOW DOES THIS VARY BETWEEN PARKS? BY TIME OF DAY? DAY OF WEEK?

People visit the waterfront with diverse intentions. Variation between parks and diverse programming make visiting the waterfront a unique experience that appeals to all different types of individuals. This section shows the primary reasons why visitors reported they came to the waterfront.

With broad range of events scheduled throughout the summer and without significant amenities to support socializing in the space at other times, programming is naturally the biggest draw for visitors to the Great Plaza. Games, activities, and amenities drive visitors to Summerfest, especially with the introduction of the Midway. The reasons that people visit Spruce Street Harbor Park are much more evenly distributed, with tourism, rest and relaxation, nice weather, and socializing all mentioned frequently.

Figure 28: Reasons for visiting vary significantly by park

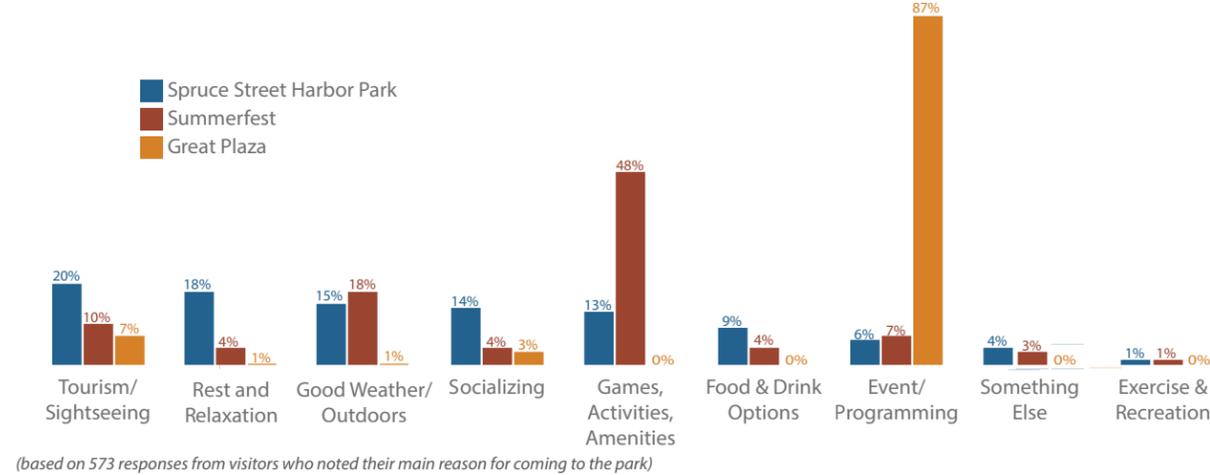
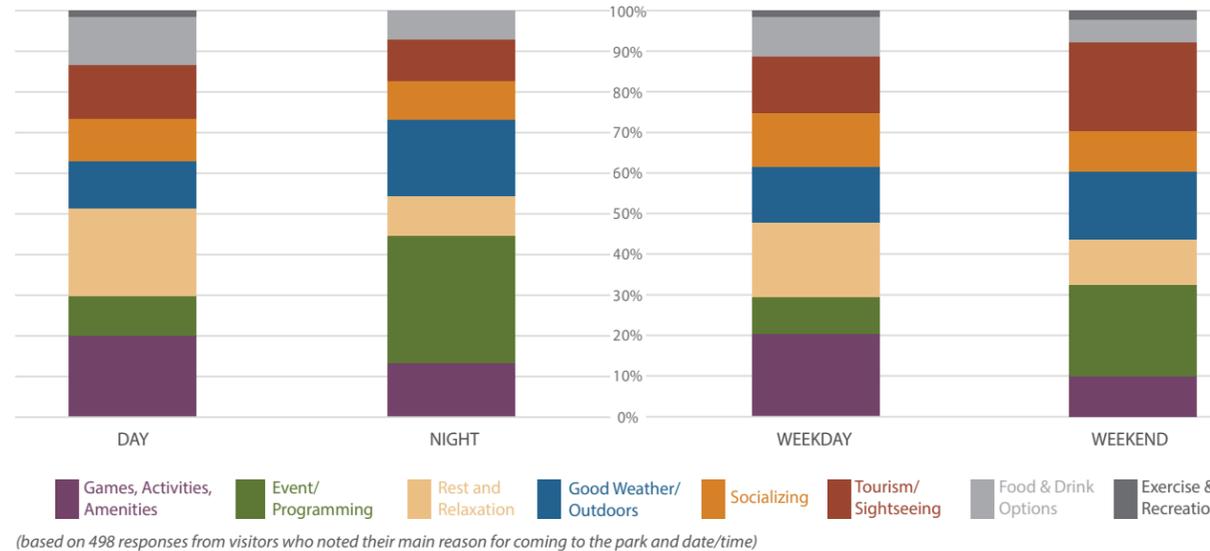
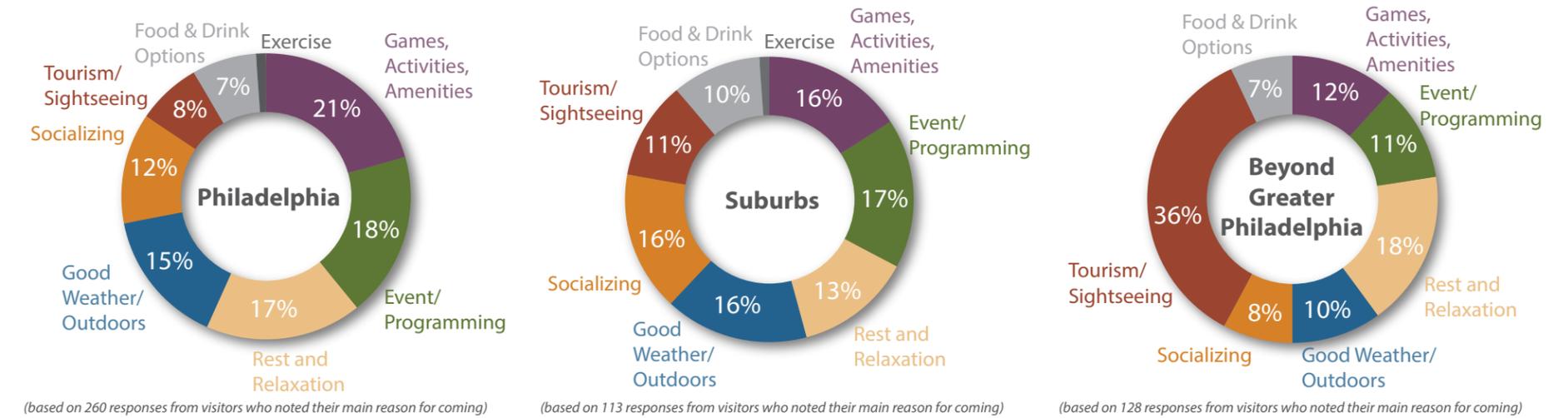


Figure 29: Park usership varies by time of day and day of week



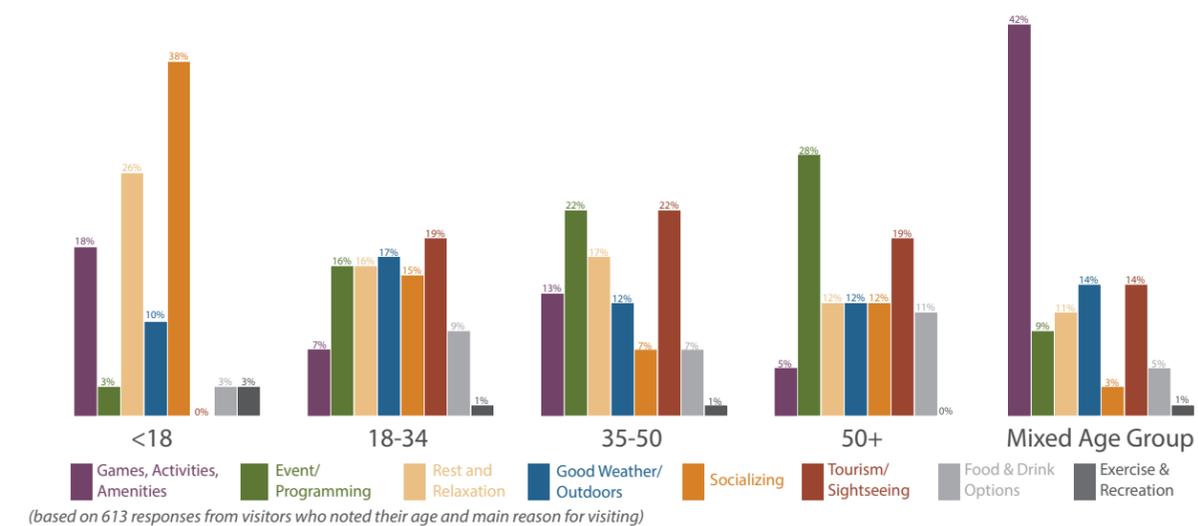
## DO CITY RESIDENTS USE THE PARKS THE SAME WAY AS THOSE FROM THE SUBURBS AND BEYOND?

Figure 30: Visitors' main reasons for visiting vary by where they are coming from



## WHY DO DIFFERENT AGE GROUPS VISIT THE WATERFRONT?

Figure 31: Main reasons for coming to the parks vary by age group



Visitors come to the waterfront for a broad range of reasons, no matter where they are coming from. Games and activities as well as events and programming are strong pulls for both Philadelphia residents and visitors from the suburbs. Visitors from beyond Greater Philadelphia see the waterfront as a good way to see the city. Visitors from all origins view the Philadelphia waterfront as a destination for rest and relaxation and enjoying good weather.

Reasons for coming to the parks also vary by age. Visitors under 18 are more likely to come to socialize and visitors over 35 are increasingly likely to come for events. Programming is not a strong draw for people under 18, presenting an opportunity for additional events that could attract that age group. Mixed age groups (mostly families) are especially drawn to the parks for games and activities.

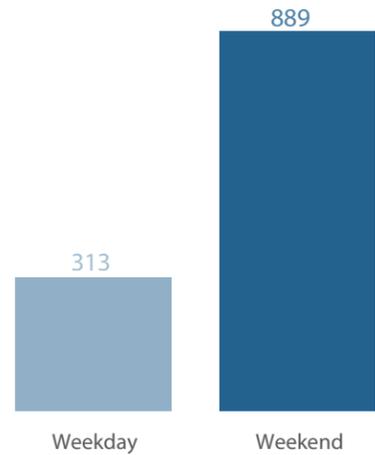
# HOW DO VISITORS USE THE SPACE?

## SPRUCE STREET HARBOR PARK

Visitor counts at Spruce Street Harbor Park rise steadily throughout the day, reaching their peak in the evening hours (after 5:00 pm). A spike in numbers is visible between late morning and early afternoon, reflecting the many people who come to the park around lunchtime. Weekends see much heavier crowds than weekdays do, with the average number of people in the park at one time on a weekend reaching almost 900, compared to about 300 during the week.

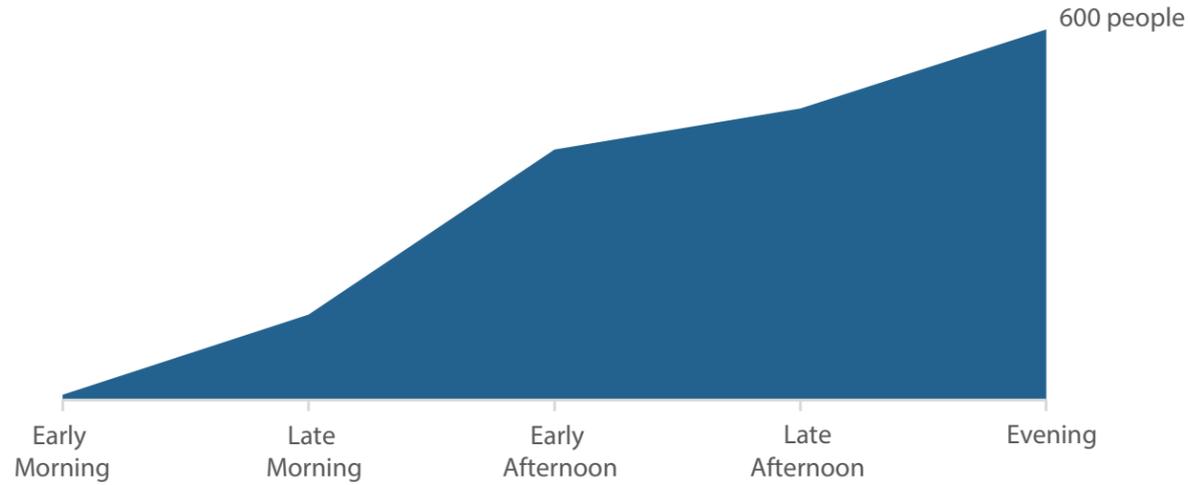
Spatially, weather has an effect on where visitors choose to spend time. When it moves from warm to very hot, fewer visitors are in the Barge and Games - North areas, preferring to spend time in the shady Games - South area and air conditioned arcade.

Figure 33: Weekends see more visitors than weekdays



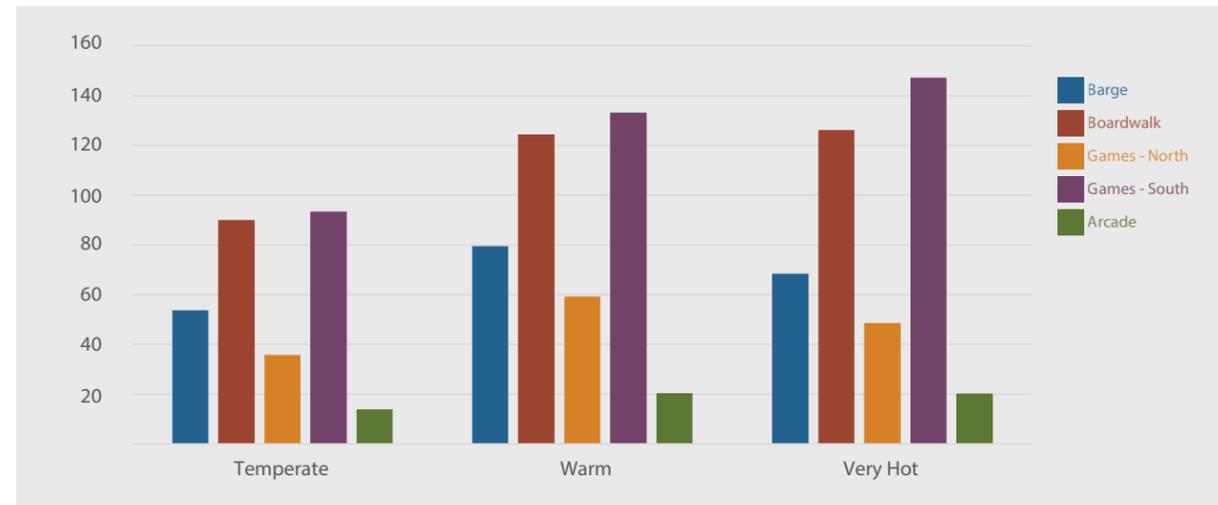
(based on averaged data from 54 people counts at Spruce Street Harbor Park)

Figure 32: People counts at Spruce Street Harbor Park climb steadily throughout the day



(based on averaged data from 54 people counts at Spruce Street Harbor Park)

Figure 34: Weather impacts where people spend time in the park



(based on averaged data from 54 people counts at Spruce Street Harbor Park)

## MOSTLY FAMILIES AND FRIENDS DURING THE DAY, THE PARK TRANSITIONS TO MORE COUPLES AT NIGHT

Figure 35: Distribution of group types within the park. Each of the below squares is colored to represent the most common group type in that grid cell (see map in Appendix for zone definitions)



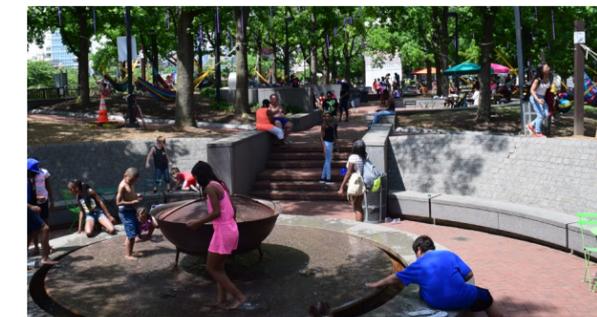
Group Type Key: Families (Purple), Friends (Green), Individuals (Blue), Couples (Yellow)

In the early afternoon, the park is mostly filled with families and friends. Families are especially concentrated in the Arcade, Games - South, and Games - North sections of the park.

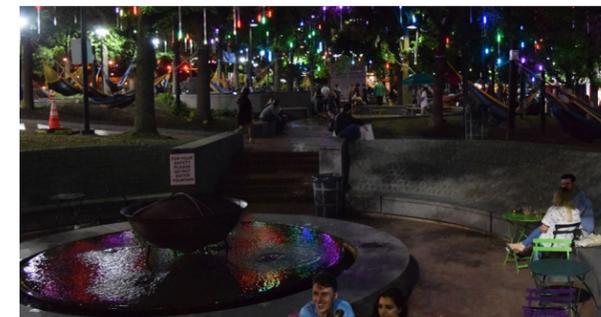


(based on detailed observation data collected at the park throughout the day on June 29, 2017)

By the late afternoon, the park is filling up with more of a mixture of families, friends, individuals and couples. Families are still especially concentrated in the games areas.



Toward the evening, visitor patterns shift to mostly couples and friends. Both families and individuals decrease in number and concentration and many more people are using the barge.



## SUMMERFEST

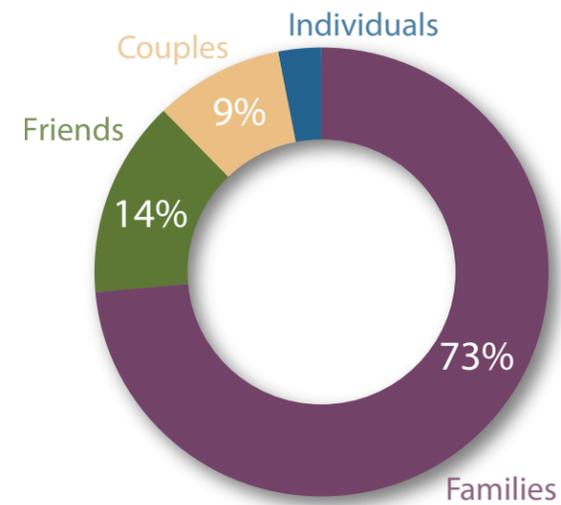
Similar to Spruce Street Harbor Park, the highest attendance numbers at Summerfest fall on nights and weekends. Overall, attendance numbers are lower at Summerfest than at Spruce Street Harbor Park, although the introduction of the Midway at Summerfest toward the end of June, 2017 had a significant impact on park attendance (Figure 30). While the average number of people in the park on a weekend day before the Midway opened was 137 people, this number more than doubled to 347 after the ferris wheel and games opened at the park.

The vast majority (73%) of people who visit Summerfest are families, likely due to the nature of the games and rides at the park.

Figure 36: The Midway at Summerfest

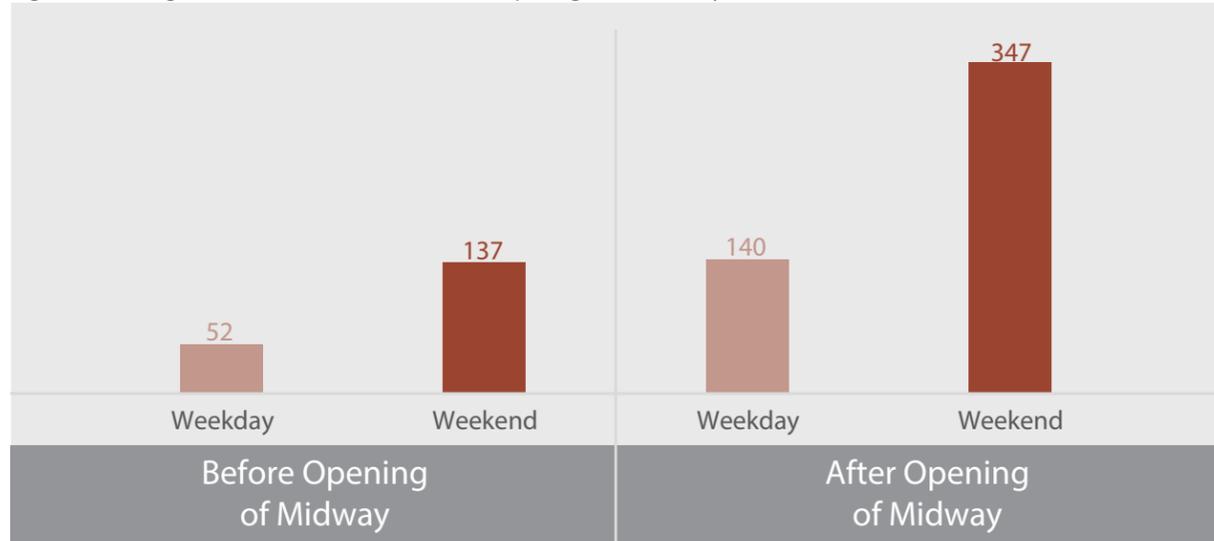


Figure 37: The majority of Summerfest visitors are families



(based on 64 responses with group type recorded)

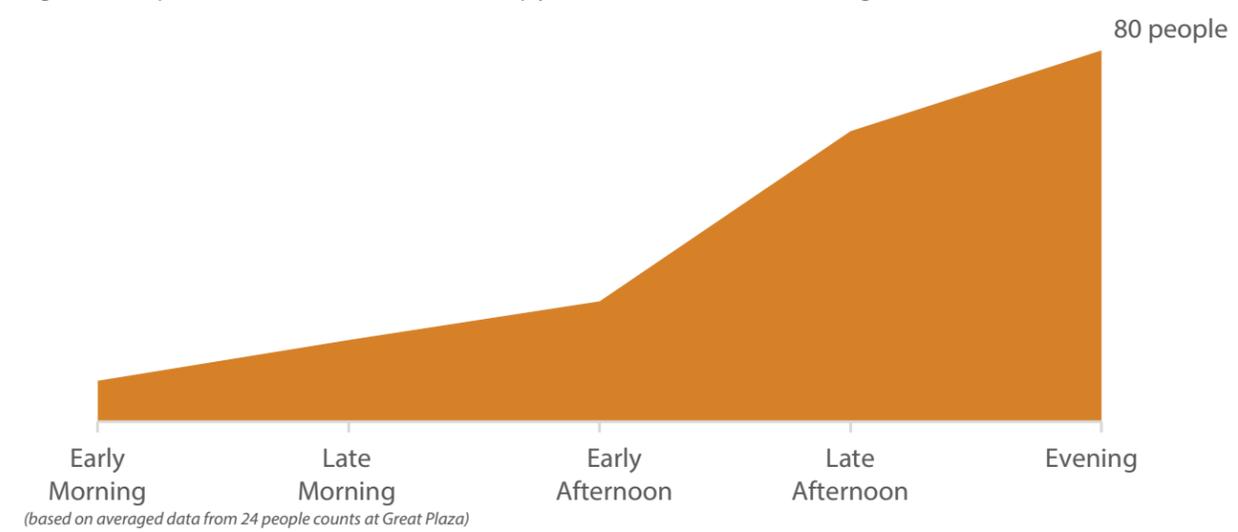
Figure 38: Average attendance before and after the opening of the Midway at Summerfest



(based on averaged data from 33 people counts at Summerfest)

## GREAT PLAZA

Figure 39: People counts at Great Plaza increase sharply in the late afternoon and evening

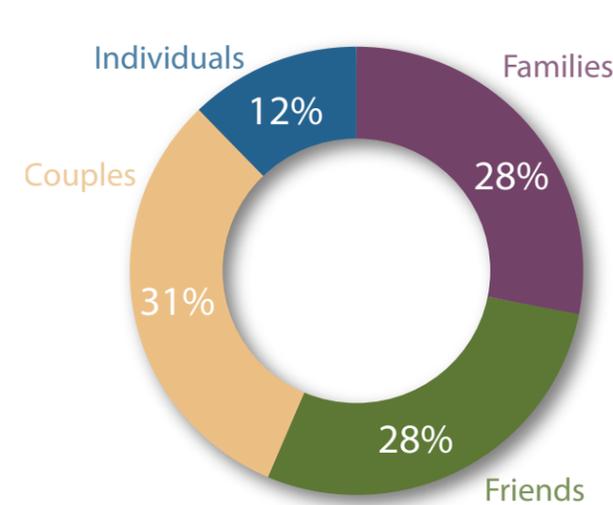


(based on averaged data from 24 people counts at Great Plaza)

The number of people in the Great Plaza increases drastically in the afternoon and evening. While numbers in this space during non-programming hours are not as high as at Spruce Street Harbor park and Summerfest, they show a distinct variety of uses and types of visitors.

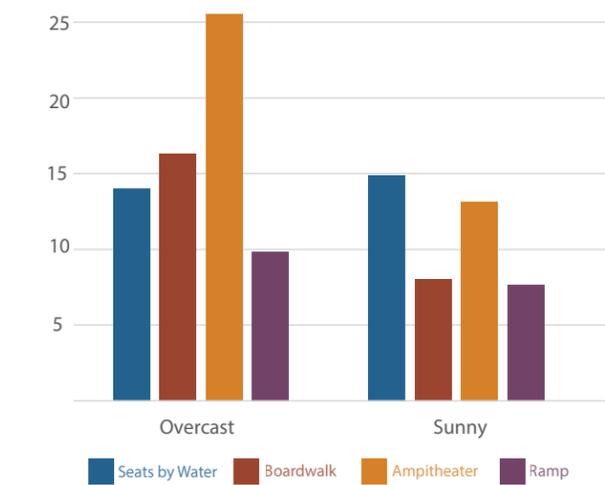
Weather has a significant impact on use of the space. Visitors are more likely to sit in the amphitheater when the weather is overcast, likely due to the hot surfaces and lack of shade that occurs when the sun is out. Visitors are more likely to sit by the water when the weather is sunny.

Figure 40: All types of groups come to the Great Plaza



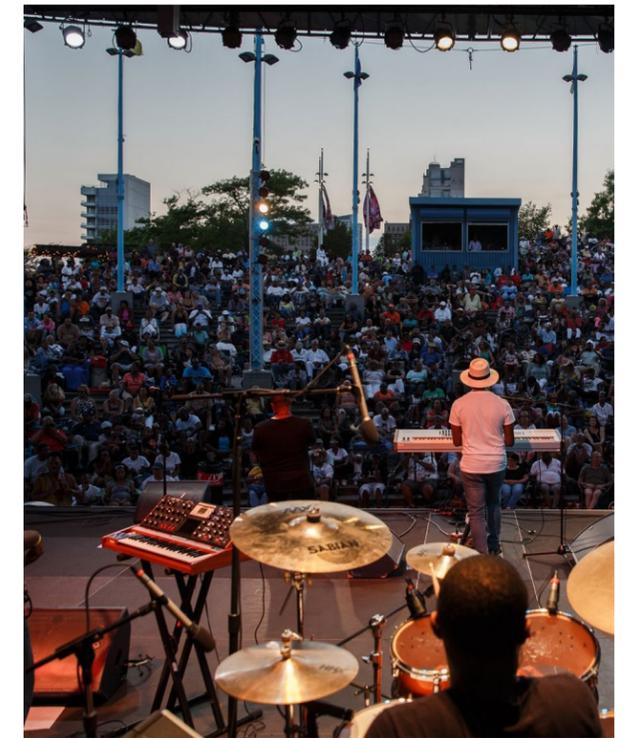
(based on averaged data from 24 people counts at Great Plaza)

Figure 41: Use of the space changes depending on weather



(based on averaged data from 24 people counts at Great Plaza)

Figure 42: Smooth Jazz at Great plaza



# VISITOR PERCEPTIONS OF SPACE

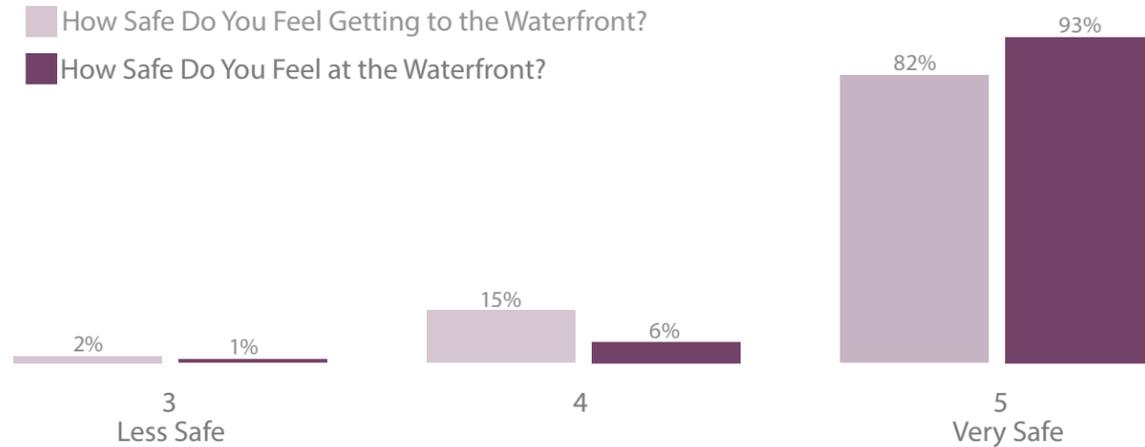
## MOST VISITORS FEEL VERY SAFE BOTH AT THE WATERFRONT AND GETTING HERE

The vast majority of visitors to the park feel very safe, both getting here and once they are at the parks. The 2017 survey asked people to choose a value between one and five, with one meaning "unsafe" and five meaning "very safe". No one gave a value of one or two.

It is worth noting, however, that people wouldn't come to the waterfront if they didn't feel safe. Further data collection should target people who are not already at the waterfront to see if their opinions of the safety of the area differ.

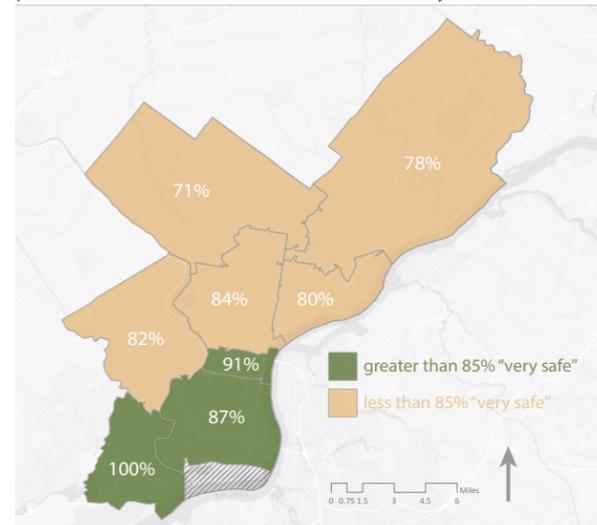
Visitors tend to feel less safe getting to the waterfront than they do once they're here. Many of the comments accompanying these lower safety ratings mentioned traffic in the area and the difficulty of crossing Christopher Columbus Boulevard. A few visitors also mentioned that they felt safe at that moment, but they were not sure how safe they would feel in the area at night.

Figure 43: The majority of visitors to the waterfront feel very safe both getting here and at the waterfront



(based on data from 487 responses from visitors who noted their feelings of safety)

Figure 45: Visitors from South Philly feel safer getting to the parks than visitors from North and West Philly



(based on 249 responses from Philly residents who noted their feelings of safety)

Figure 46: Visitors from the Greater Philly area feel slightly less safe at the parks

Safety Ratings of 5 (very safe):

**Philadelphia 94%**

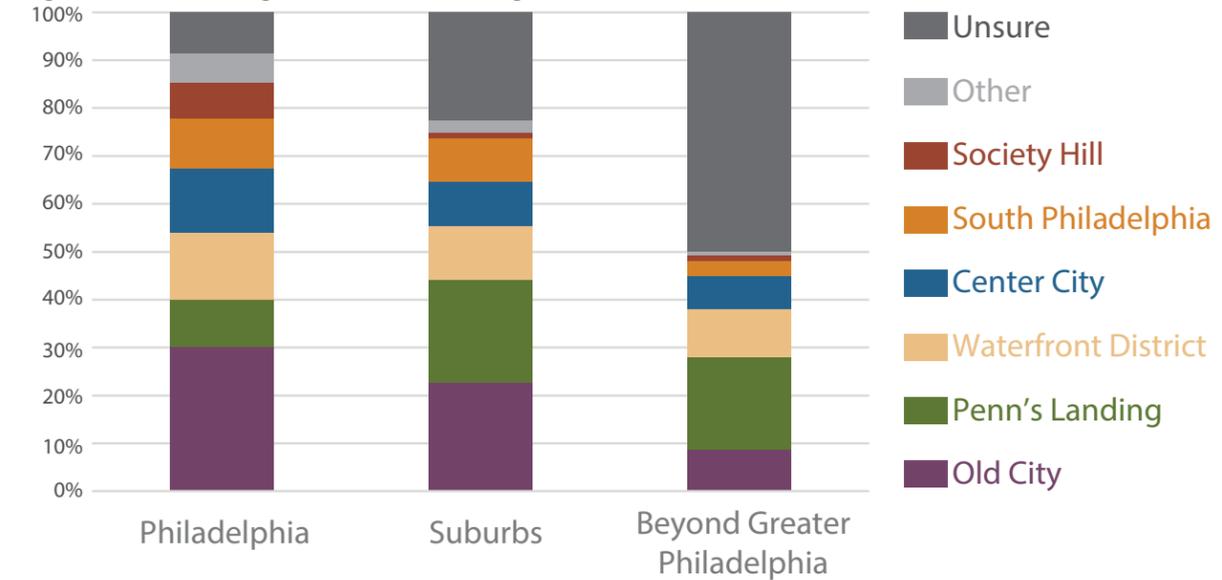
**Greater Philly 90%**

**Beyond 95%**

(based on 484 responses from visitors who noted their feelings of safety)

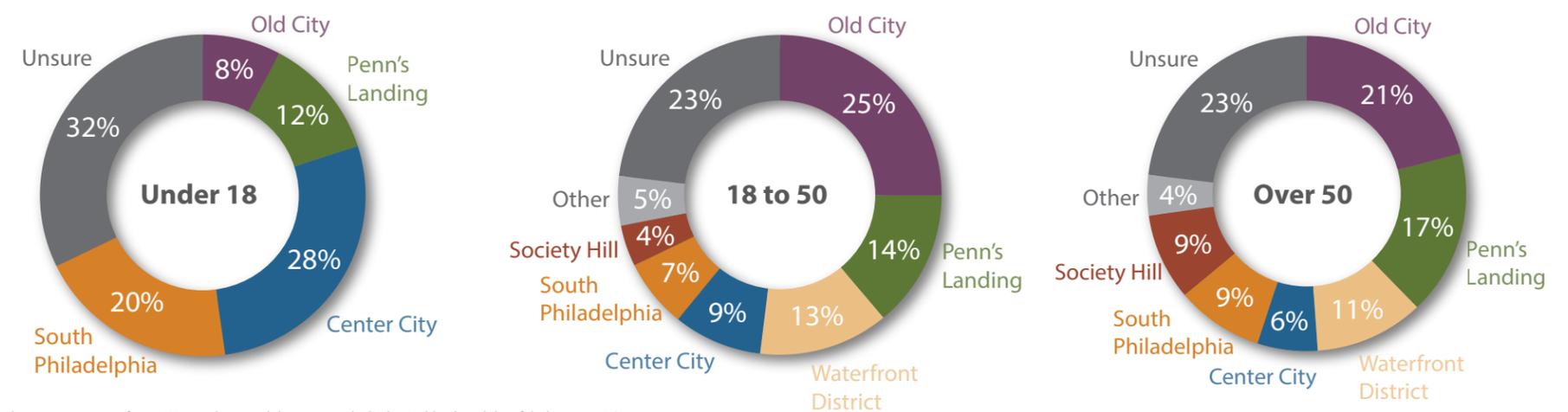
## WHAT NEIGHBORHOOD DO VISITORS SEE THE WATERFRONT AREA AS?

Figure 47: There is no single consensus on what neighborhood the waterfront area is in



(based on 483 responses from visitors who noted their zip code and which neighborhood they felt they were in)

Figure 48: Neighborhood perception varies by age



(based on 328 responses from visitors who noted their age and which neighborhood they felt they were in)

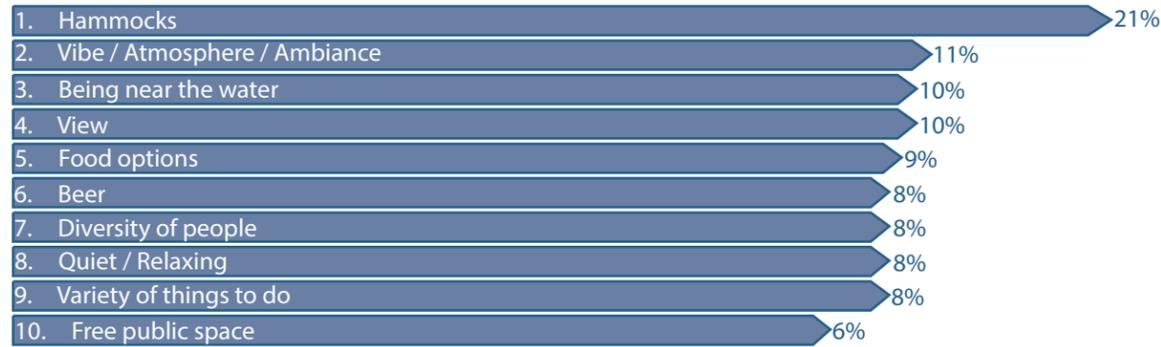
Almost thirty percent of visitors surveyed from Philadelphia see the waterfront as a part of the Old City neighborhood. Other popular responses include Center City and South Philadelphia. Many visitors from greater Philadelphia and beyond see the waterfront as part of the Penn's Landing neighborhood or as its own distinct neighborhood. These differences in neighborhood perception make sense since so many visitors from beyond Philadelphia drive to the parks, while many visitors from Philadelphia get to the parks by crossing over the highway from Old City.

Neighborhood perception also varies by age. Adults are more likely to see the parks as a part of Old City than visitors under 18. People over 50 are more likely to call the area Penn's Landing.

Figure 44: Intersection at Spruce Street Harbor Park



## TOP 10 FAVORITE THINGS AT SPRUCE STREET HARBOR PARK



(based on 436 responses from people who provided their favorite things at Spruce Street Harbor Park)

"It's an escape from both the city and the country...it's something completely different"

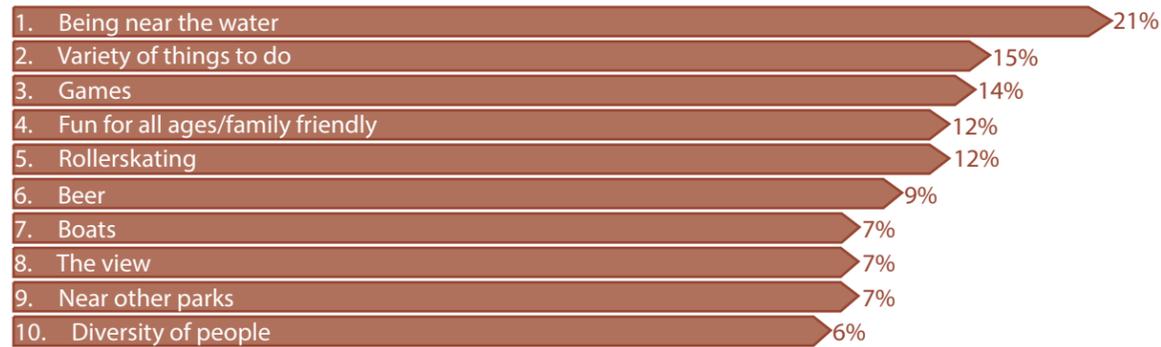
"I want to be able to touch the water!"

## TOP SUGGESTED IMPROVEMENTS AT SPRUCE STREET HARBOR PARK



(based on 284 responses from people who provided improvement suggestions for Spruce Street Harbor Park)

## TOP 10 FAVORITE THINGS AT SUMMERFEST

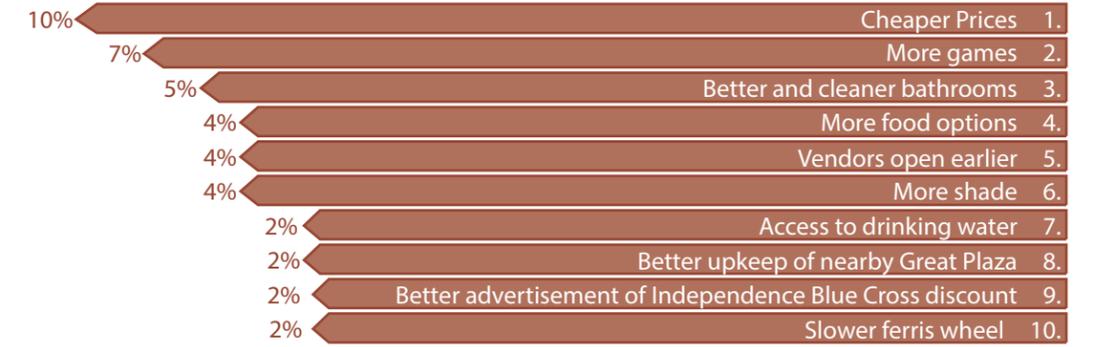


(based on 94 responses from people who provided their favorite things at Summerfest)

"Social events, music, food, arts—there's a variety of things to do that you don't get elsewhere...and it's all FREE!"

"The cost of parking keeps a lot of my friends from coming down here"

## TOP SUGGESTED IMPROVEMENTS AT SUMMERFEST



(based on 94 responses from people who provided improvement suggestions for Summerfest)

## TOP 10 FAVORITE THINGS AT GREAT PLAZA

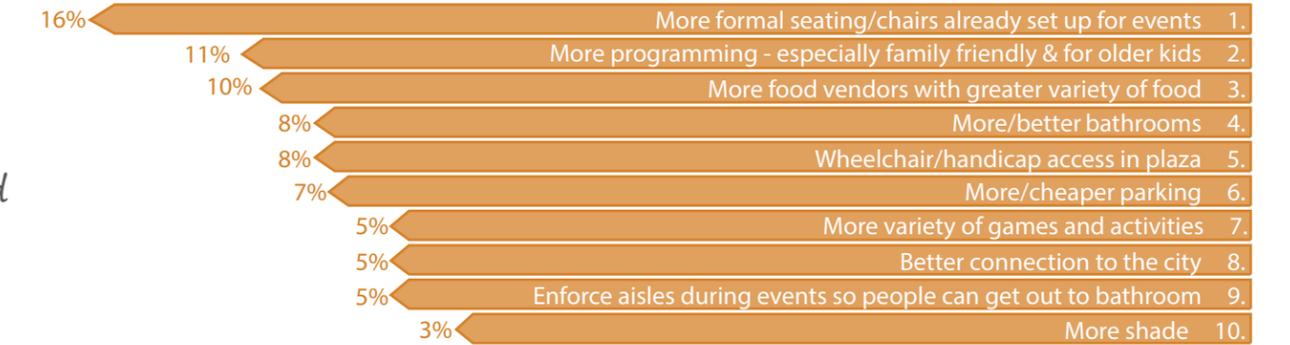


(based on 61 responses from people who provided their favorite things at Great Plaza)

"EVERYONE is here"

"I would love to see more greenery and grassy areas"

## TOP SUGGESTED IMPROVEMENTS AT GREAT PLAZA



(based on 61 responses from people who provided improvement suggestions for Great Plaza)

"This is what August means to me" (referring to the weekly Smooth Jazz events)

"It can get too hot to relax and enjoy myself"

# SALES AND VENDOR DATA

## SUMMERFEST

Figure 49: Change in Summerfest Annual Revenue, 2015-2017

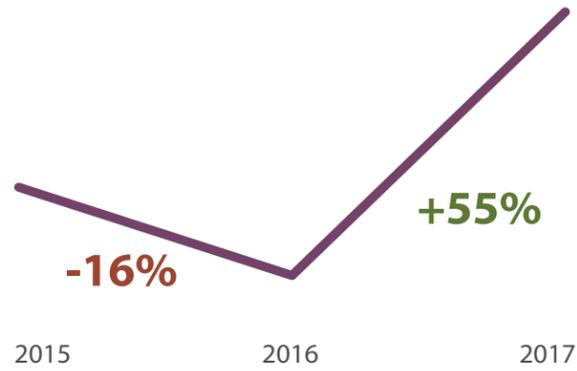
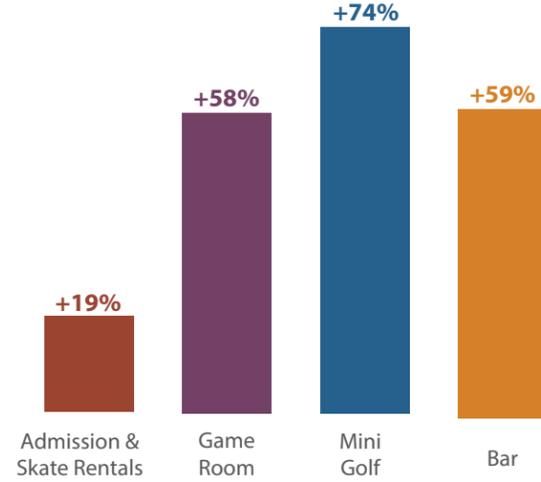


Figure 50: Growth Per Revenue Stream, 2016-2017

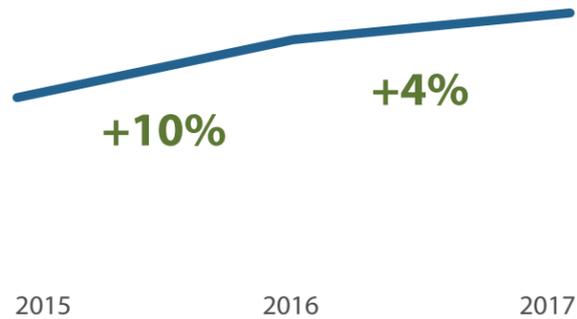


This summer, Summerfest debuted its Midway attractions, featuring a variety of carnival games and rotating ride attractions each month, which had a significant impact on revenue across all of the park's revenue streams. Although it is harder to quantify impacts between parks, Spruce Street Harbor Park's steady growth in revenue is likely due in part to the new programming at Summerfest. Many visitors carried prizes from the carnival games at Summerfest and raved about their rides on the ferris wheel.

By compiling year over year revenue and expenditure data for Spruce Street Harbor Park, we are able to estimate the cumulative economic impact of the park's four years of operation on the City of Philadelphia. DRWC hopes to expand similar data analysis to other parks to achieve a fuller sense of the economic impact of DRWC's investment in Philadelphia's waterfront.

## SPRUCE STREET HARBOR PARK

Figure 51: Change in SSHP Annual Revenue, 2015-2017



NB: The above annual revenue totals for Spruce Street Harbor Park do not include final arcade revenue numbers and operate under the assumption that 2017 arcade revenue will be similar to 2016.

Figure 52: The Midway at Summerfest



## LOCAL ECONOMIC IMPACT

Figure 53: Economic impact of Spruce Street Harbor Park to the City of Philadelphia, 2014 - 2017



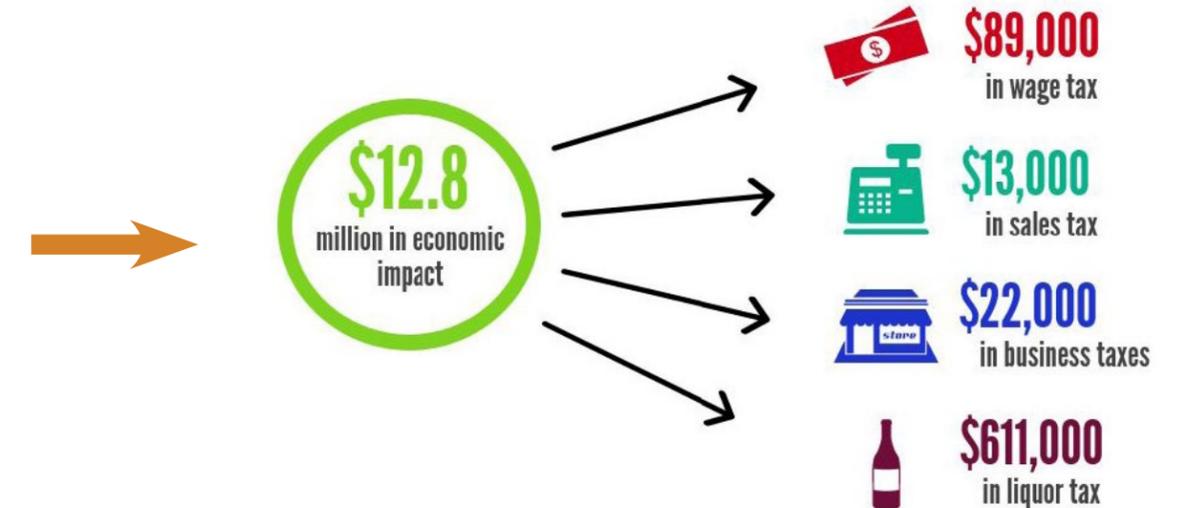
Source: Econsult Solutions, Inc.; Piktochart(2017), ESI (2017)



Figure 54: Estimated tax revenues to the city and school district of Philadelphia, 2014 - 2017



Source: Econsult Solutions, Inc.; Piktochart(2017), DRWC (2017), ESI (2017)



# ADDENDUM: WINTERFEST DATA

## OVERVIEW

Building on the success of the summer data collection initiative, this project sought to continue a similar survey program at Winterfest, DRWC's winter programming space at Penn's Landing. In-person surveys were conducted at a variety of days and times while the park was open between November, 2017 and March, 2018. For ease of comparison, many of the same questions from the summer data collection project were maintained.

This project sought to answer many of the same research questions from the summer season, but with a few differences. Since data from Winterfest is not available prior to the 2017-2018 season, data interpretation is focused instead on comparison with summer trends and behaviors along the waterfront. This data is mostly compared with the results of 2015 and 2017 surveying at Summerfest, the summer programming at the same site, to account for site-specific trends and to allow for a comparison of similarly-sized data samples. This project specifically attempts to answer the following questions:

**How do visitors view and use the waterfront differently during the winter and summer seasons?**

**What impact have DRWC's more recent interventions, including the Lodge and the fire pits, had on the long-time ice skating site?**

**Is Winterfest accessible to all Philadelphians and is it integrated into the fabric of the city?**

Figure 1: View of the Winterfest rink and decorations from above



Figure 2: Locator map for winter 2017-2018 data collection at Winterfest



## KEY TAKEAWAYS

### 1. Festivity is Key at Winterfest

More than half of all visitors to Winterfest come to the waterfront to ice skate. Not only that, but ice skating makes up the largest motivation for visiting the park across all group types. When asked about their favorite part of Winterfest, however, the vast majority of visitors cite the decorations, atmosphere, and festive feel of the park. Those who have been coming to the area for a long time note the difference that the decorations have made to the skating environment.

### 2. Driving is Down Since 2015

While more visitors are driving to Winterfest than did to the parks during the summer, driving is down and other modes are up compared to the summer 2015

season. This indicates that even when the weather is cold, walking, SEPTA, and rideshare modes are increasing in popularity. These trends reinforce patterns observed over the summer months and supports the motivation for continued improvements to the safety and accessibility of the parks to pedestrians.

### 3. Waterfront Visits are Year-Round

Sixty-five percent of visitors surveyed at Winterfest this season had visited the Penn's Landing parks last summer, indicating that the waterfront is a year-round destination. Many visitors noted a desire for games or food vendors that they enjoyed during the summer months to reappear at Winterfest, particularly giant jenga and the Distrito food truck.

### 4. Still No Defined Neighborhood

Consistent with summer responses, there is no real consensus on what neighborhood Winterfest belongs to. The most common responses are Old City and Penn's Landing, indicating that visitors both connect the park back to the city on the other side of the highway as well as isolate the waterfront as its own area. Some visitors don't see the area as part of any neighborhood at all. This highlights the need to make better connections back to the city and to establish a strong sense of place along the waterfront.

### 5. Word of Mouth Remains Important

While Winterfest has a large percentage of visitors who have been coming to the waterfront to ice skate for 'forever,' word of mouth from friends and family is still the largest driver of new visitors to the park. This is consistent with summer patterns, reinforcing the fact that DRWC should maintain fresh and exciting programming to keep people talking about the parks. Keeping track of social media in its own category during the winter survey session more strongly highlighted the importance of this mode of communication to the waterfront parks.

### 6. People Want More of a Good Thing

In recommending improvements, most visitors wanted more of what currently exists: more fire pits, more seating, more games, more food, and easier access to the beer stand. Many mentioned Spruce Street Harbor Park and called for an expansion of parks and programming along the waterfront during the winter season. Despite the cold weather, visitors love being at the waterfront and consistently call it a 'magical' destination.

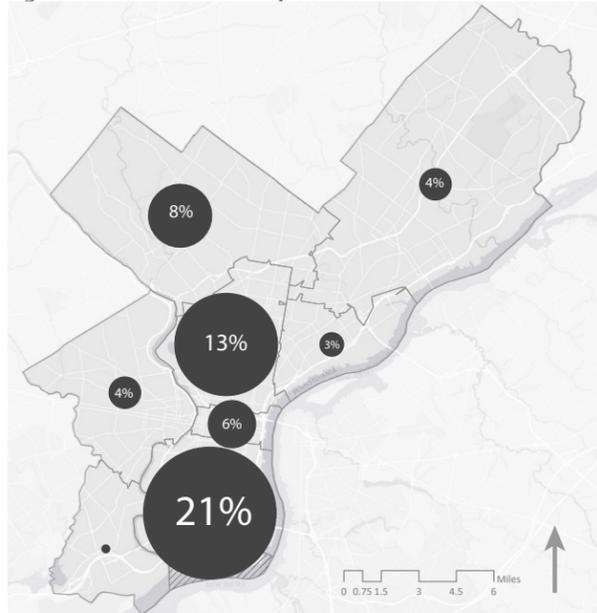
# ADDENDUM: WINTERFEST DATA

## WHERE DO VISITORS COME FROM?

Sixty-two percent of visitors surveyed at Winterfest live in the city of Philadelphia and another 29% come from the greater Philadelphia region. This local representation is an increase from the summer season, when a full 20% of visitors came to Summerfest from beyond greater Philadelphia. This likely mirrors seasonal tourism patterns for the city as a whole.

Locally, visitors during the winter come from throughout the city, but are generally more likely to visit from neighborhoods closer to the waterfront. Visitors from South Philadelphia, Center City, and North Philadelphia all increased sharply from summer patterns. Overall, even in winter, the Philadelphia waterfront maintains its role as both a local and regional attraction.

Figure 4: Distribution of Philly visitors to Winterfest

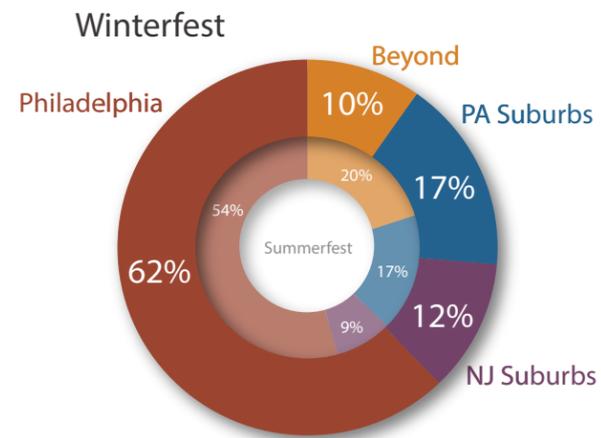


(based on 113 responses from visitors who noted their zip code of residence)

Figure 3: Late afternoon skating at Winterfest

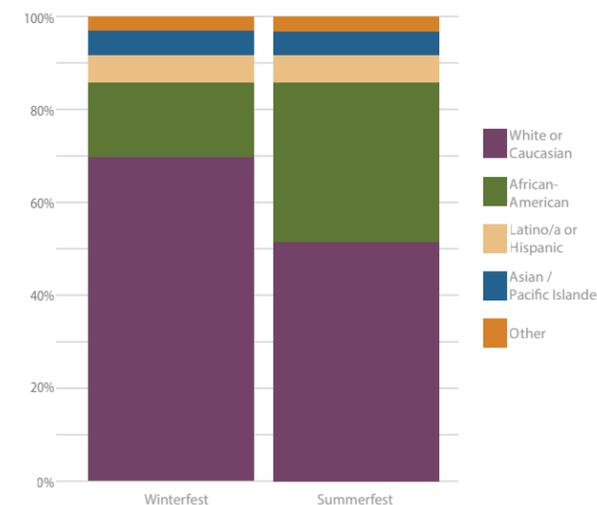


Figure 5: Breakdown of where Winterfest visitors come from



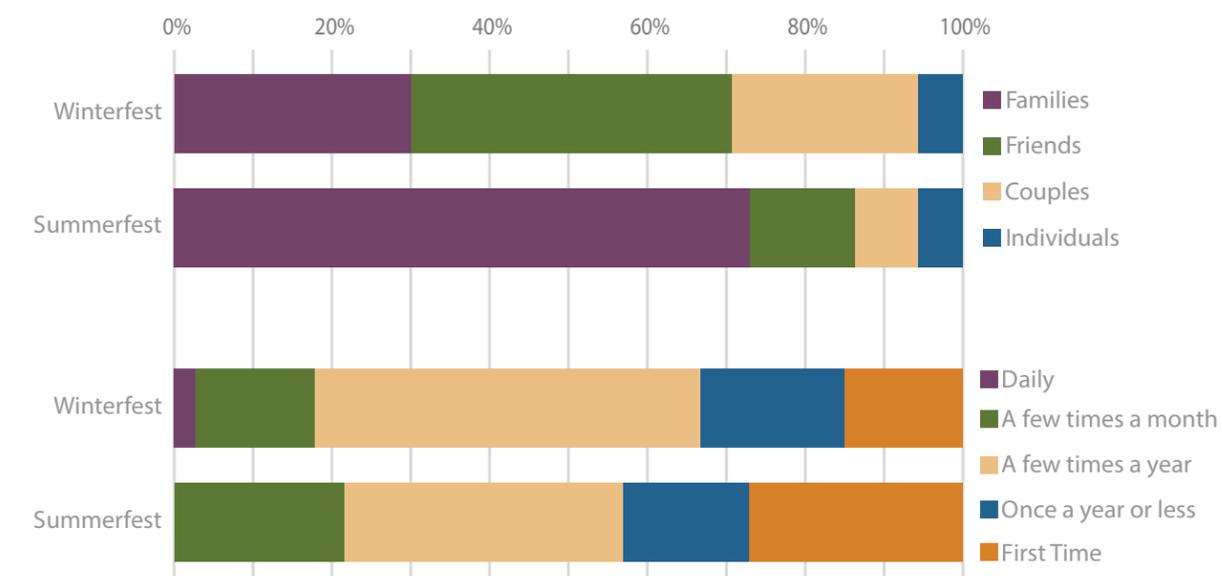
(based on 613 responses from visitors who noted their zip code of residence)

Figure 6: Race and Ethnicity at Winterfest vs. Summerfest



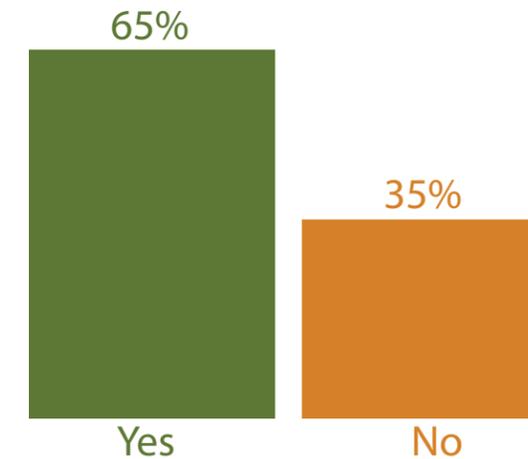
(based on 594 responses from visitors who noted their race or ethnicity)

Figure 7: Breakdown of groups visiting the waterfront, Winterfest compared to Summerfest



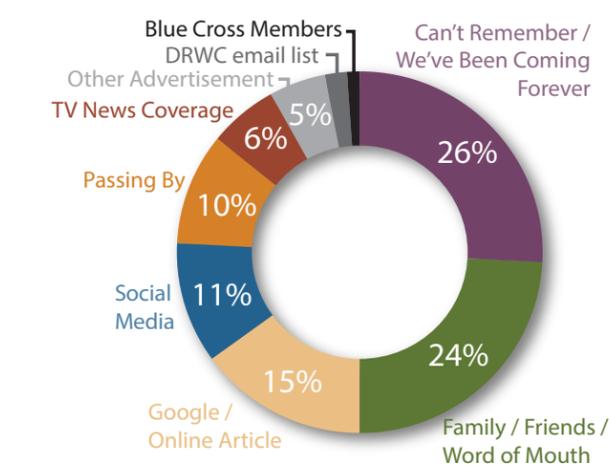
(based on 179 responses with group type recorded)

Figure 8: Did you visit the waterfront last summer?



(based on 115 responses from visitors who answered this question)

Figure 9: How Did You Hear About Winterfest?



(based on 115 responses from visitors who indicated how they heard)

## WHO IS VISITING?

Visitors to Winterfest reflect different overall trends compared to summer visitors at Summerfest. While the vast majority of visitors to Summerfest were family groups, Winterfest visitors are more evenly split between families, friends, and couples. This likely reflects two overall trends: first, the popularity of the fire pits and lodge for non-family groups, and second, the absence of nearby Spruce Street Harbor Park to draw non-family groups away from the rink area.

Winterfest has been around for longer than Summerfest, and this is reflected in visitor patterns. Only 17% of visitors surveyed at Winterfest were visiting the park for the first time, compared to 27% of surveyed visitors at Summerfest. However, Summerfest visitors reported visiting the waterfront more frequently; 22% of surveyed visitors come to the waterfront a few times a month, compared to only 14% during the winter.

Visitors to the waterfront see the area as a year-round destination, with 65% of Winterfest visitors reporting that they also visited the waterfront this past summer.

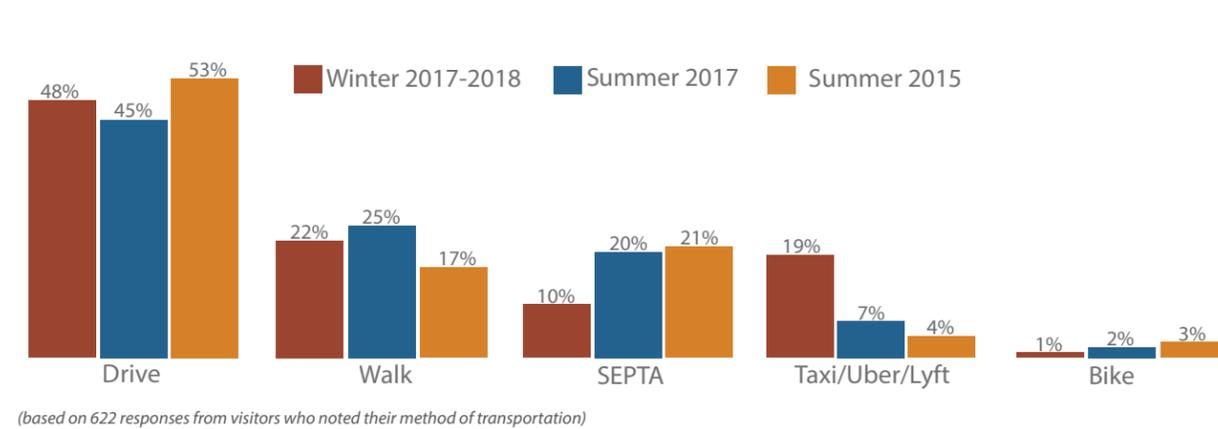
Since it has been around for longer, Winterfest has a much more loyal following, with 26% of visitors surveyed indicating that they come every year and have been coming for a long time. Notably, for those who are hearing about the park for the first time, word of mouth remains key, with almost as many visitors indicating that they heard about the park from family and friends. Response bins were tweaked for the winter version of this question to better reflect the difference between social media and online search engines/articles, tv news coverage, and other sources.

# ADDENDUM: WINTERFEST DATA

## HOW DO VISITORS GET HERE?

Transportation patterns at Winterfest reflect winter weather patterns and an increase in visitors from the greater Philadelphia area. This winter, more people drove to the waterfront and fewer people walked or took SEPTA. Especially striking is the sharp jump in Taxi/Uber/Lyft use at the waterfront this winter, likely due in part to colder weather. It is interesting to note, however, that, despite these increases, driving rates are still lower and walking rates are higher when compared to the summer 2015 season. This could illustrate favorable trends as the Delaware River Waterfront starts to feel more connected to the city and reinforces the importance of making the park safe and accessible to pedestrians.

Figure 10: Comparing transportation methods over time



## PERCEPTIONS OF SPACE

Similar to trends observed over the summer, visitors to Winterfest have very mixed views about what neighborhood the park is in. Many respondents literally look back to the city when asked the question, searching for landmarks as indicators. In general, many visitors view the area as part of either Old City or Penn's Landing, presenting more of a consensus than summer visitors. This is likely due, in part, to the more northern location of Winterfest compared to Spruce Street Harbor Park and the Great Plaza, as well as the long-time ice rink located at Penn's Landing.

Many visitors from beyond the greater Philadelphia region were not aware of any sort of a waterfront neighborhood identity, which could indicate that additional branding for out of town visitors might be helpful. Patterns of neighborhood perception by region and age did not change significantly between Summer and Winter programming.

Figure 11: Visitor perception of the neighborhood where Winterfest is located

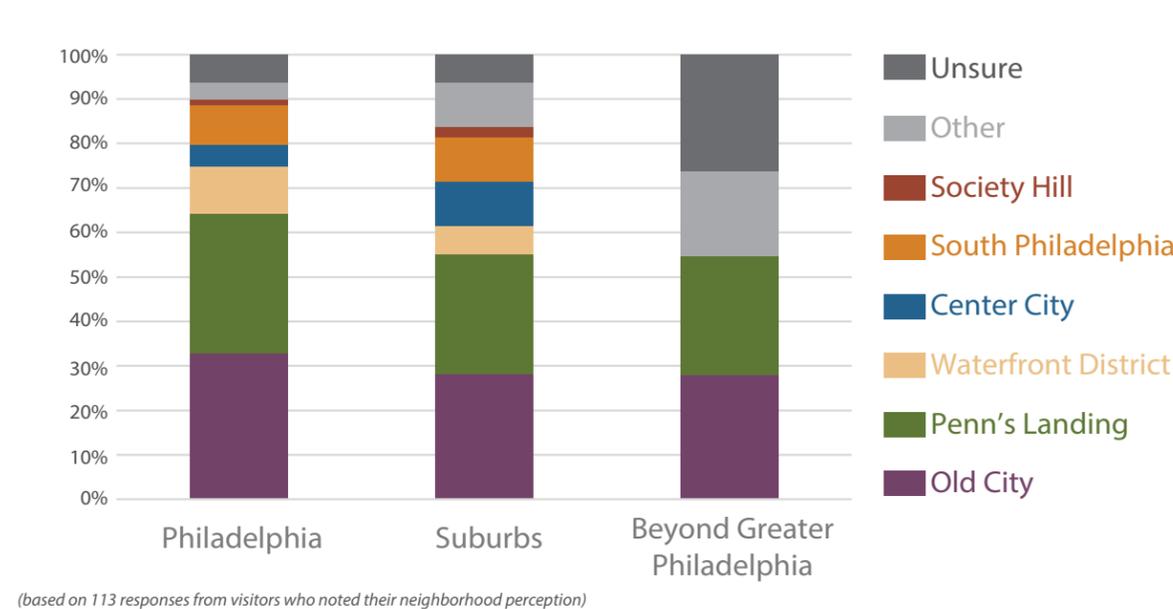
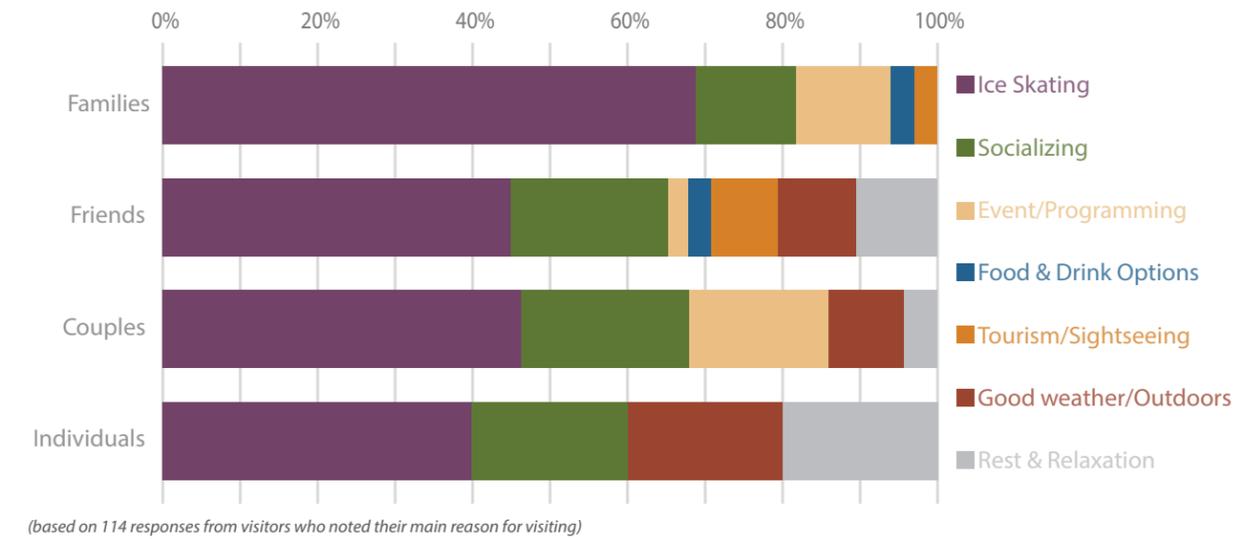


Figure 12: Reasons for coming to Winterfest vary some by group type



## FAVORITE THINGS

1. Park Design / Decorations / Festive Atmosphere
2. Ice Skating
3. Fire Pits
4. Delaware River Scenery / Location
5. Food & Drink Options

## SUGGESTED IMPROVEMENTS

1. Crowds! A second beer line, more fire pits, more seating, make the park bigger
2. More games, especially giant games from summerfest
3. Food variety, healthier options, more variety
4. Pricing - both parking and skating/ food - possibility for family discounts or packages?
5. Access to information - website unclear about when vendors open & skating time limits; better signage to get to park

## MAIN REASON FOR VISITING

While reasons for coming to Winterfest vary by who is visiting, the main driver of visits across all group types is ice skating. Socializing also makes up a significant portion of responses across all groups. Less active responses, such as Rest & Relaxation and Good Weather/Outdoors are common for people visiting the park on their own. Couples and families are more drawn to programming and events at the park.

Visitors love the 'magical' atmosphere of the parks, with one person surveyed noting that "this is exactly what the holiday season means to me." Most of the recommended improvements relate to how crowded the park can get. A significant number of people asked for improved information about vendor hours on the website and better signage to help with getting to the park.

Figure 12: Fire pits at Winterfest

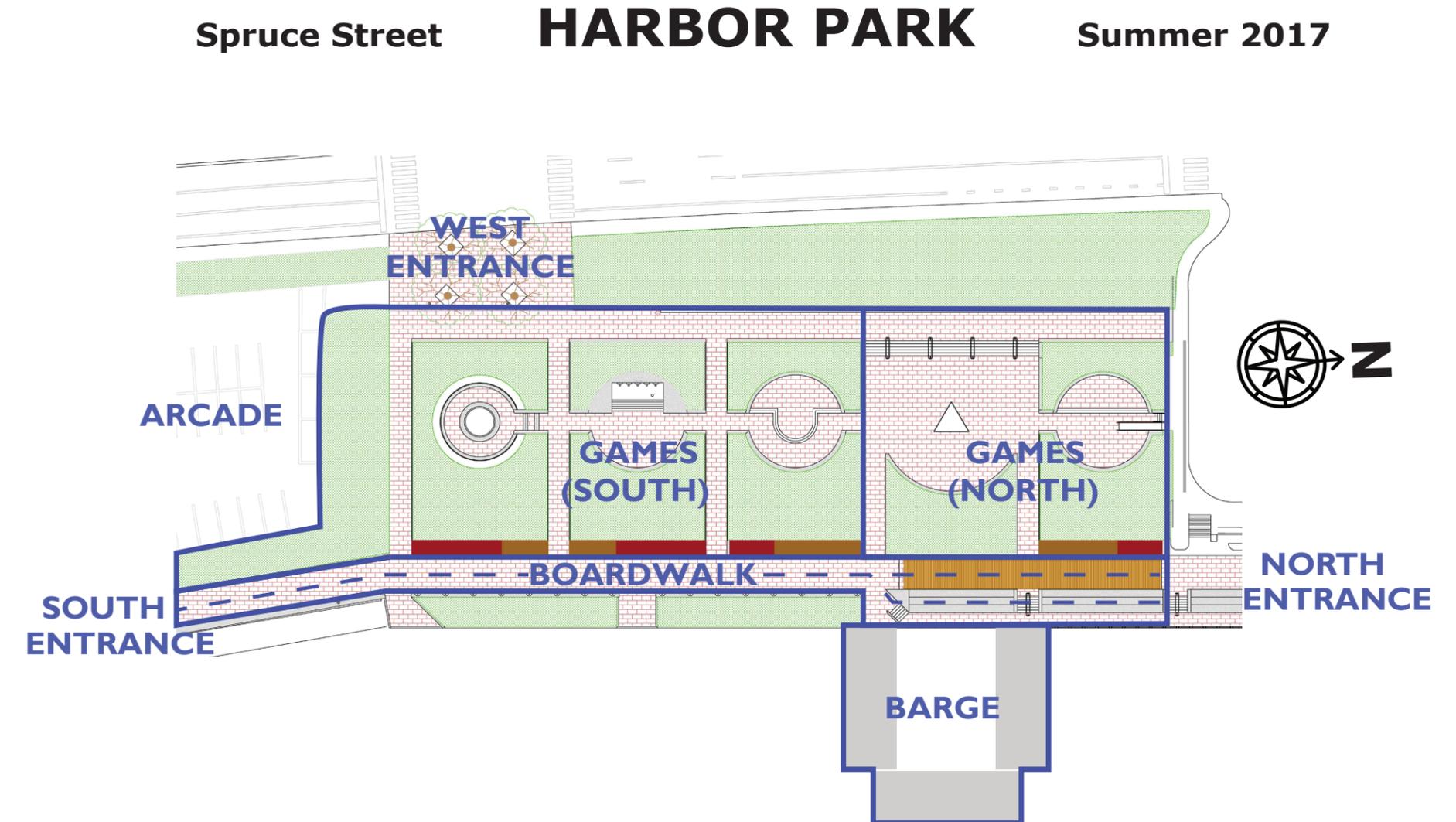


# APPENDIX

## SUMMER 2017 VERBAL SURVEY

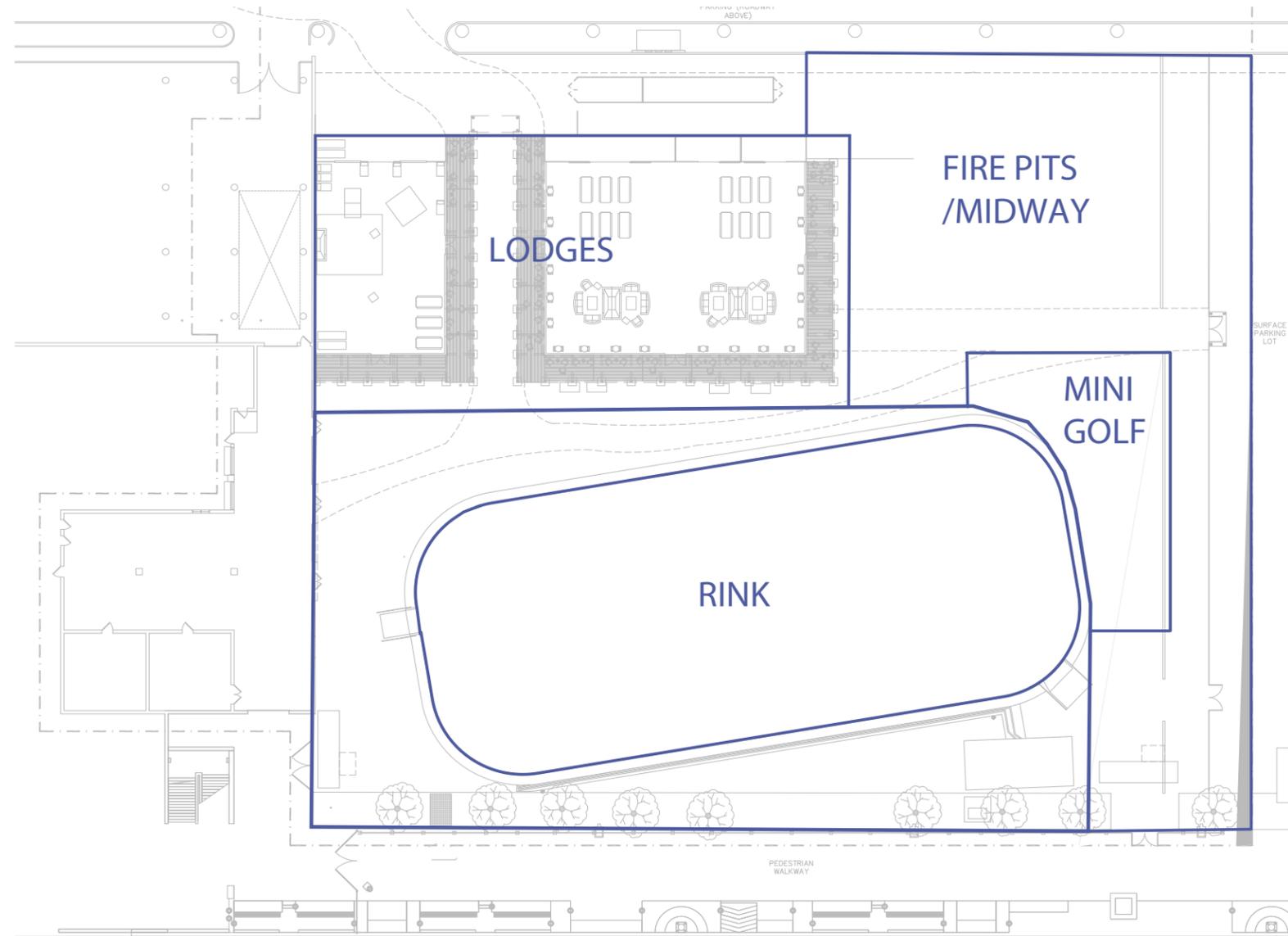
Date and time:		Activity:									
Location:	Harbor Park	River Rink	Great Plaza	SSHP Zone:	Barge	BW	G-N	G-S	Arcade	Swings	
# People:	1	2	3-4	5+	RR Zone:	Rink	Lodges	Fire Pit	MG		
Age:	<18	18-34	35-50	51-64	>64	Mixed Group	Children:	Y	N	Group Type:	
1. How did you get here today?	Drive	Walk	Bike	Taxi/Uber/Lyft	SEPTA	other					
2. How often do you visit the waterfront?	Daily	A few times a month	A few times a year	Once a year or less	First time						
3. What neighborhood do you consider this area to be in?											
4. How safe do you feel getting to the waterfront?		5 (very safe)	4	3	2	1 (unsafe)					
5. How safe do you feel at the waterfront?		5 (very safe)	4	3	2	1 (unsafe)					
6. How did you hear about SSHP/Summerfest/etc?											
7. What was your primary reason for visiting the waterfront today?											
8. What is your favorite thing about the waterfront?											
9. What would you like to see improved in the future?											
10. What is your home zip code?											
11. What is your gender identity?	Male	Female	Other	DNA							
12. What is your race/ethnicity?	African-American or Black	Asian/ Pacific Islander	Latino/a or Hispanic	White	Other	DNA					
13. What is your highest level of education completed?	Some High School	High School Degree	Bachelor's Degree	Post Graduate Degree	DNA						
14. Willing to provide name and email address for future newsletters and surveys?											

## SPRUCE STREET HARBOR PARK DATA COLLECTION ZONES

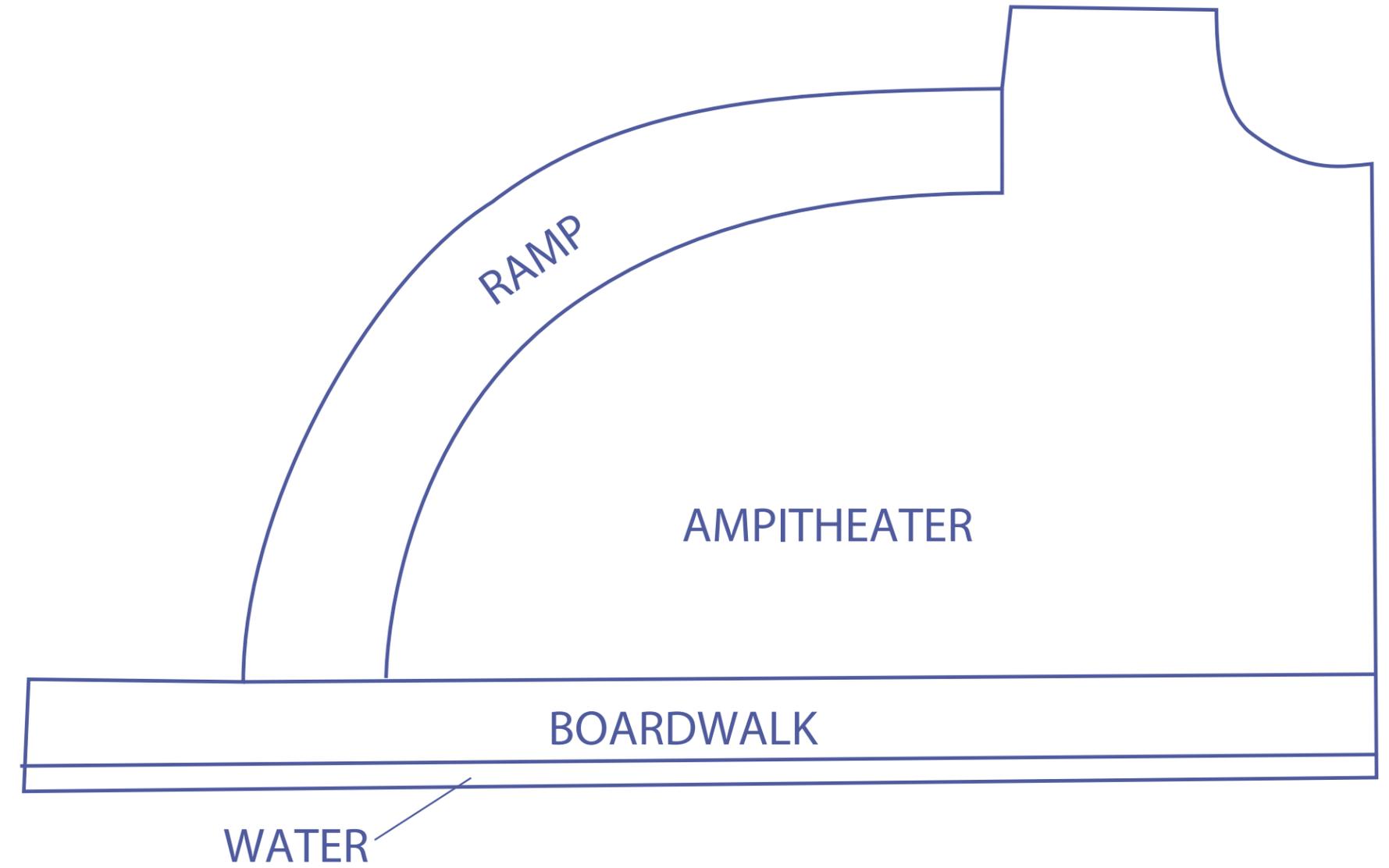


# APPENDIX (CONT.)

## SUMMERFEST DATA COLLECTION ZONES



## GREAT PLAZA DATA COLLECTION ZONES



# APPENDIX (CONT.)

## WINTER 2017-2018 VERBAL SURVEY

Date and time:

Zone: Rink Rentals Rinkside Lodges Fire pit/Cabin

# People: 1 2 3-4 5+

Age Primary Resp: <18 18-34 35-50 51-64 >64

Activity:

Group Type: Family Friends Couple Indiv. Other

Mixed Age Group: Y N Children: Y N

1. How did you get here today?	Drive	Walk	Bike	Taxi/Uber/Lyft	SEPTA	other
2. How often do you visit the waterfront?	Daily	A few times a month	A few times a year	Once a year or less	First time	
3. Did you visit the waterfront this past summer?	Yes	No				
4. What neighborhood do you consider this area to be in?						
5. How did you hear about Winterfest?						
6. What was your primary reason for coming to Winterfest today?						
7. What is your favorite thing about Winterfest?						
8. What would you like to see improved in the future?						
9. What is your home zip code?						
10. What is your gender identity?	Male	Female	Other	DNA		
11. What is your race/ethnicity?	African-American or Black	Asian/Pacific Islander	Latino/a or Hispanic	White	Other	DNA
12. What is your highest level of education completed?	Some High School	High School Degree	Some College	Bachelor's Degree	Post Graduate Degree	DNA
13. Willing to provide name and email address for future newsletters and surveys?						

## WINTERFEST DATA COLLECTION ZONES

