



# PEDESTRIAN REPORT — 2016





# Overview

Downtown Tempe is the Valley's most walkable, urban environment and it is growing with new office, residential, hotels and restaurants/retail in the pipeline. Located in the heart of the metropolitan area, Downtown Tempe is the home of two of Arizona's top attractions, Historic Mill Avenue and Tempe Town Lake and Beach Park. Downtown Tempe features events, arts, sports, retail, dining, leisure, housing, major corporations, hotels, culture and more. Daily pedestrian traffic in Downtown Tempe is primarily represented by:

- 3.7 million visitors annually to the City of Tempe (Tempe Tourism)
- Approximately 32,000 employees located within one mile of Downtown Tempe center (CoStar)
- 21,000 residents within one mile, 112,000 residents within three miles (CoStar)
- 65,506 Students/Faculty/Staff combined (51,869 students and 13,637 faculty and staff) at ASU's Tempe campus (facts.asu.edu)

Downtown Tempe Authority is the private, non-profit organization that manages the Enhanced Municipal Services District and is responsible for the vibrancy and excellence of the cultural, lifestyle, and commerce experience in Downtown Tempe.

# Purpose

The Downtown Tempe Authority conducts quarterly pedestrian counts to analyze the amount of pedestrian traffic at key points in Downtown Tempe. Pedestrian Counts are completed each quarter and a comprehensive report is generated annually.

The purpose of this report is to:

- Track the short-term trends in pedestrian activity
- Identify areas that need continued activation to draw more foot traffic
- Create an information source for planners, developers, and brokers
- Assist in recruitment and retention of retail and office businesses in the area
- Track long-term variations that may indicate greater economic trends



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## METHODOLOGY

All pedestrian traffic counts for this study were determined by manual counting of individuals walking in any direction past a designated observation point (see map for specific locations).

Pedestrian counts were recorded in one hour intervals at each location.

Pedestrian counts were conducted at nine locations throughout Downtown.



## COLLECTION TIMES

Pedestrian counts were conducted on Monday, Thursday, and Saturday during five separate one hour shifts:

- 8am-9am
- 11:30am-12:30am
- 2pm-3pm
- 6pm-7pm
- 9pm-10pm

## LOCATIONS

Data was collected from 9 locations for this report.

- Rio Salado & Mill
- 3rd St & Mill
- 5th & Mill
- 7th St & Mill
- University & Mill
- 5th & Forest
- 5th & College
- 7th & College
- University & College

## REPORT TIMEFRAME

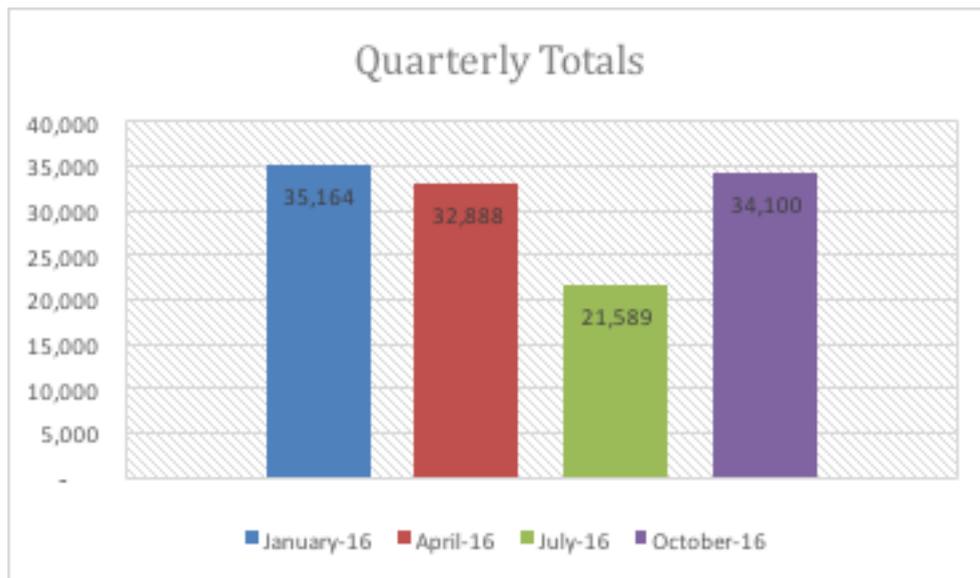
These counts are conducted quarterly. In 2016 they were conducted the last week of each month - January, April, July and October. All counts are intentionally conducted outside of known activity spikes. For example, the summer count is taken before ASU students return to campus in August, the Fall count is conducted prior to the holiday decorations and not during an ASU home game, the Spring count is conducted after Spring Training is completed.



# General Data

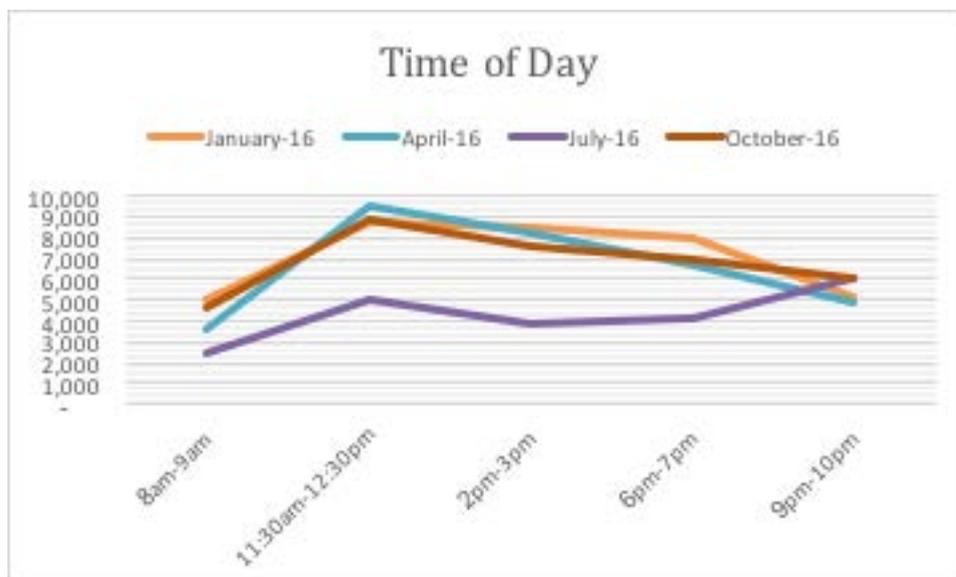
## QUARTERLY TOTALS

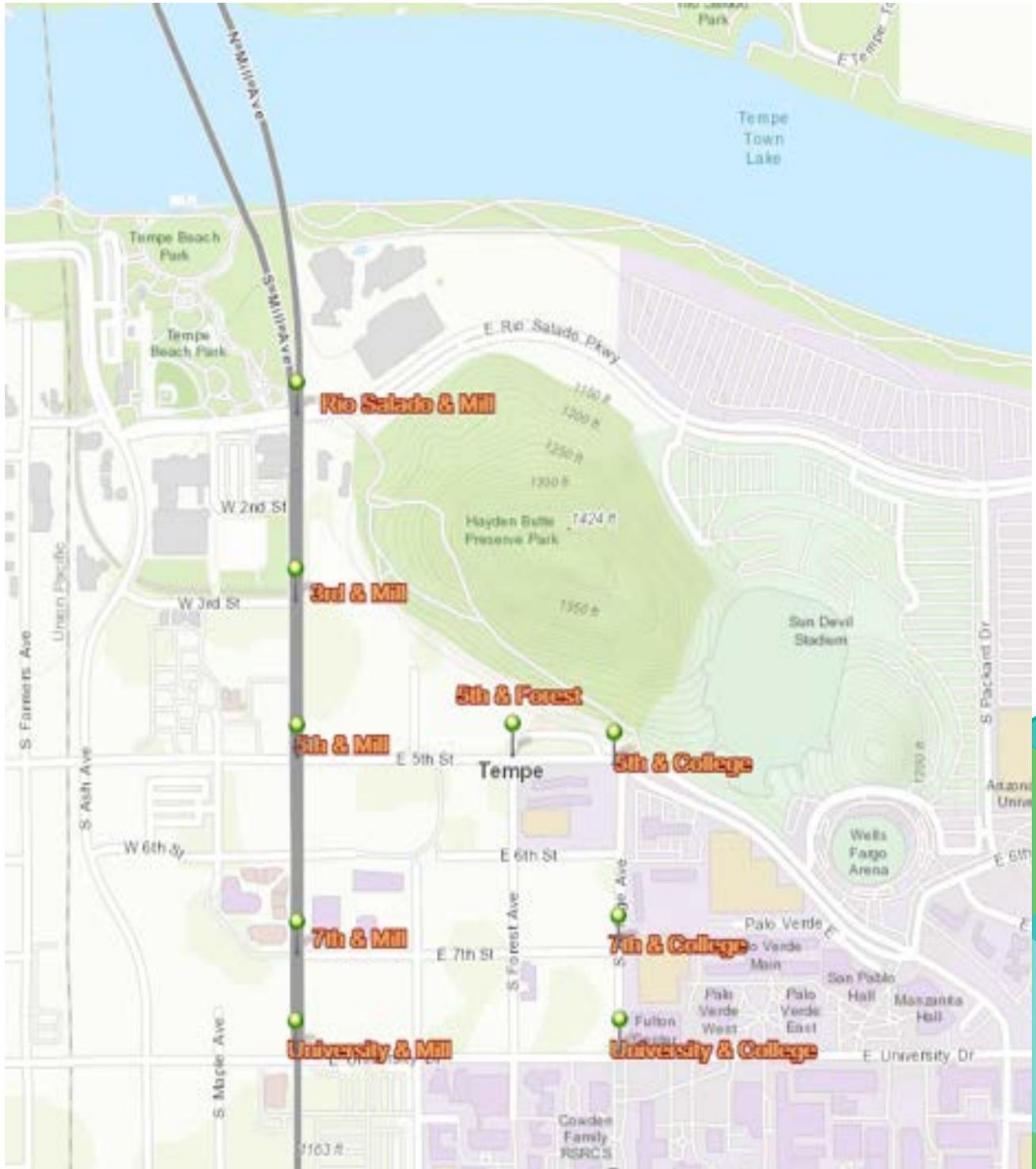
This graph depicts the total number of pedestrians counted during the four quarterly counts, not specific to location or time. As anyone would predict, July has the smallest pedestrian traffic with January and October being the highest months. There is almost a 40% decrease in total pedestrian traffic from January to July.



## TIME OF DAY

With each quarterly count, the 11:30am hour had the most counts, with the exception of July when the highest count was in the later evening.







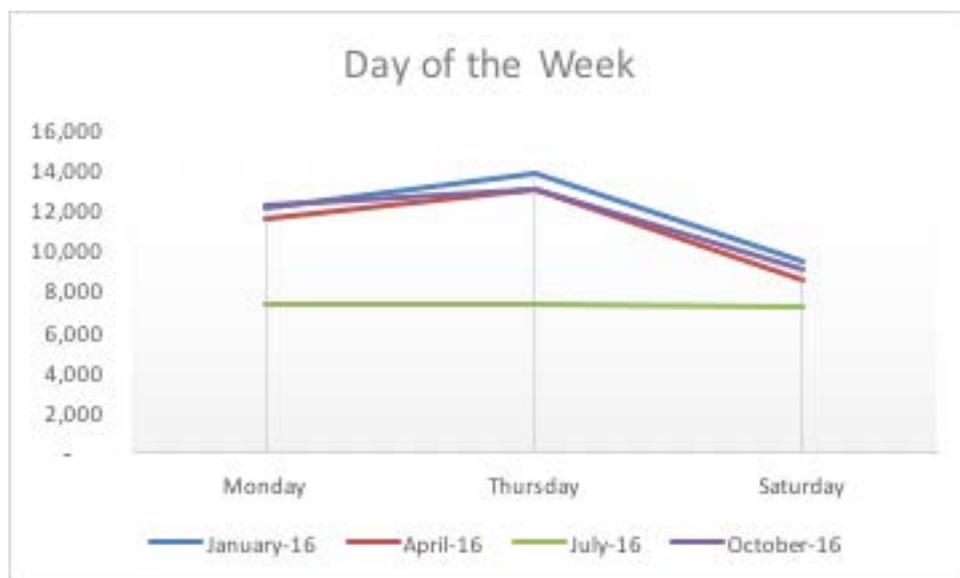
### LOCATION BY QUARTER

This graph demonstrates how each count location performed when all counts were combined for that quarter. Most quarters are similarly aligned with the exception of July. The following pages go into detail for each location and you can see the performance of each count location by quarter.



### DAY OF THE WEEK

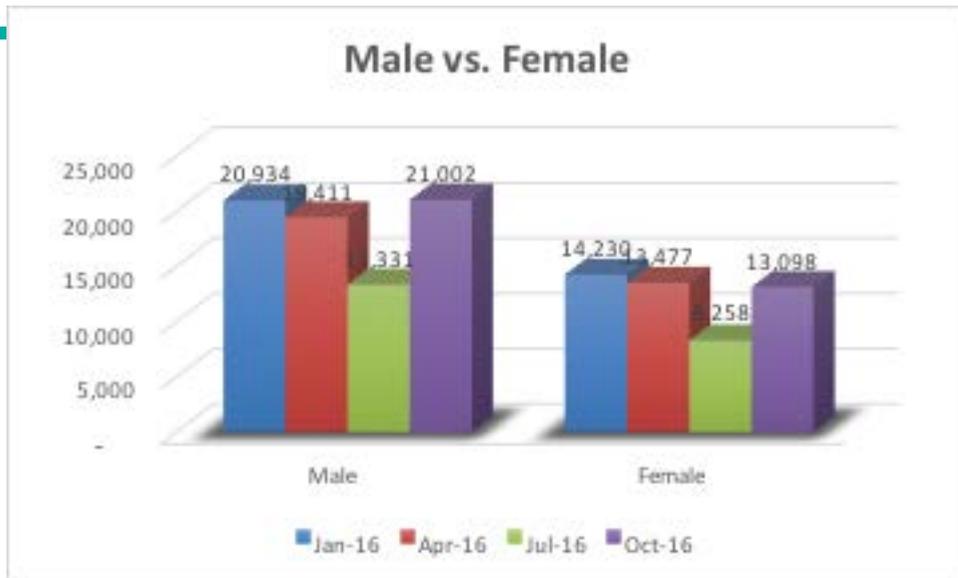
This graph shows us the overall performance of pedestrian traffic on the three different days of the week with all time frames combined. In January, April and October, Thursday is the day when the most pedestrians are in the district. July shows that the days of the week are virtually flat.





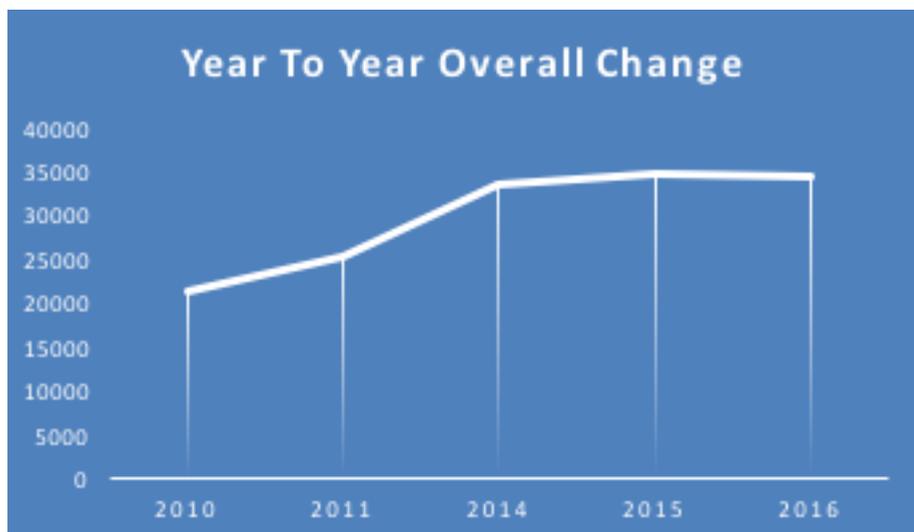
### MALE VS FEMALE

This graph demonstrates how each count location performed when all counts were combined for that quarter. Most quarters are similarly aligned with the exception of July. The following pages go into detail for each location and you can see the performance of each count location by quarter.



### YEAR TO YEAR OVERALL CHANGE

Historically our organization did counts twice per year (Spring and Fall) in 2010 and 2011 and then did not collect the data again until 2014. Since that period, we have collected the data quarterly. This represents only the Fall counts for the years presented. The trend is that there are more people generally in the Downtown district since the 2010 and 2011 counts, however the past year has been basically level.





# Location Analysis

## **QUARTERLY TOTAL**

This shows the total number of pedestrians counted during the quarter, including all five time periods on all three days. This gives a very general assessment of the performance of the location and is helpful as a baseline for total activity when looking at past years.

## **TIME OF DAY**

This shows the performance of the location for the five time periods collected and includes all three days. This indicates what time of day the location performs best, generally speaking.

## **DAY OF THE WEEK**

This combines all the time period counts for each day and reports the performance of the location on the three count days. This indicates which day of the week performs best in this location, generally speaking.

## **YEAR-TO-YEAR CHANGE**

This takes each quarters total count and compares it to that quarter from 2015. This shows general trends in activity over the year.

Should anyone be interested in getting more in depth data for each location, we can provide that. For example, if there is a desire to know specifically the count at the 8am period on Saturdays at a particular location, we can provide that detail. To keep the report manageable we have limited to these data sets, but are happy to provide further detail at any time.

Any irregularities that have explanations are noted within the location reports. Additionally, if growth occurred during that time period, those changes in the downtown makeup are noted. Finally, if there are potential developments that might affect this location in the next annual cycle, those are noted.



# Rio Salado & Mill - SW Corner

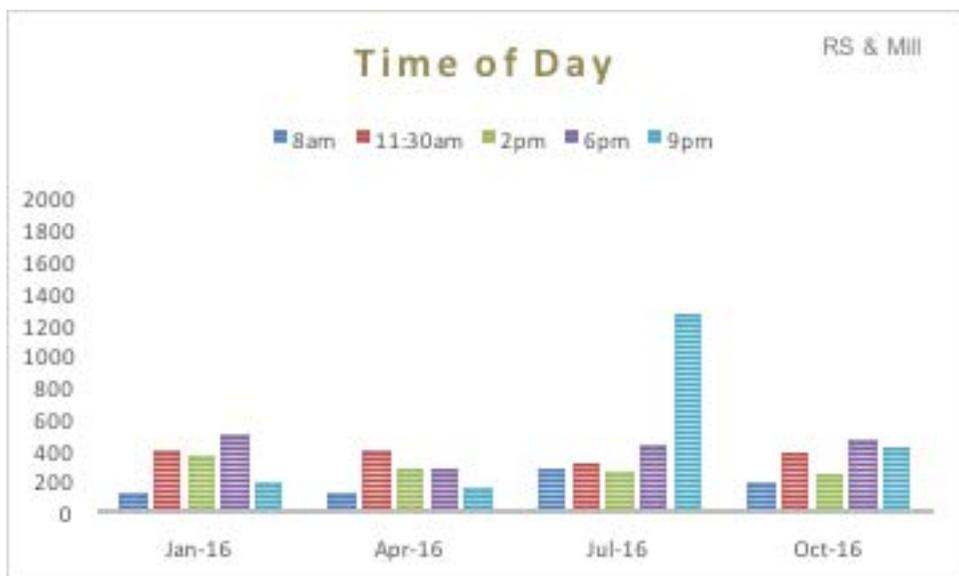
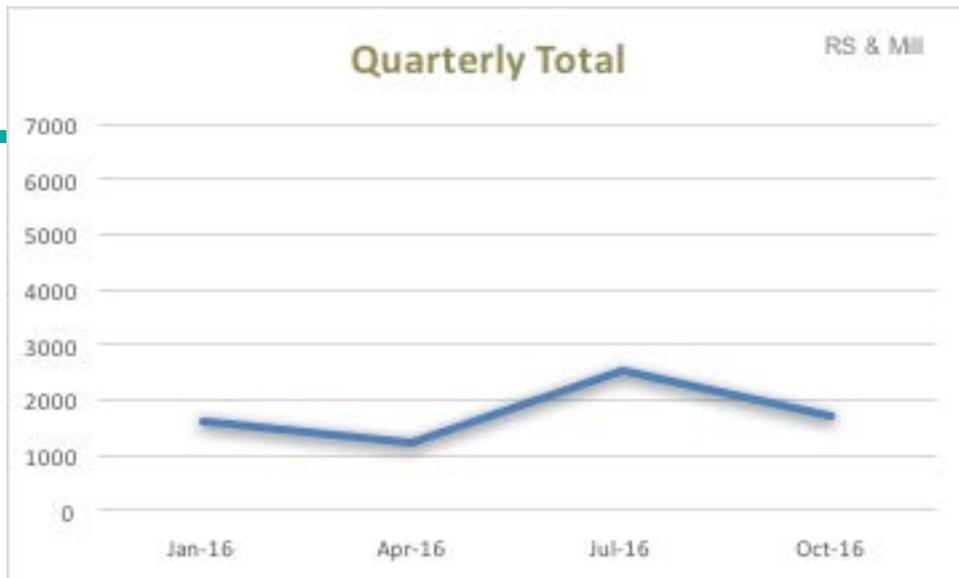


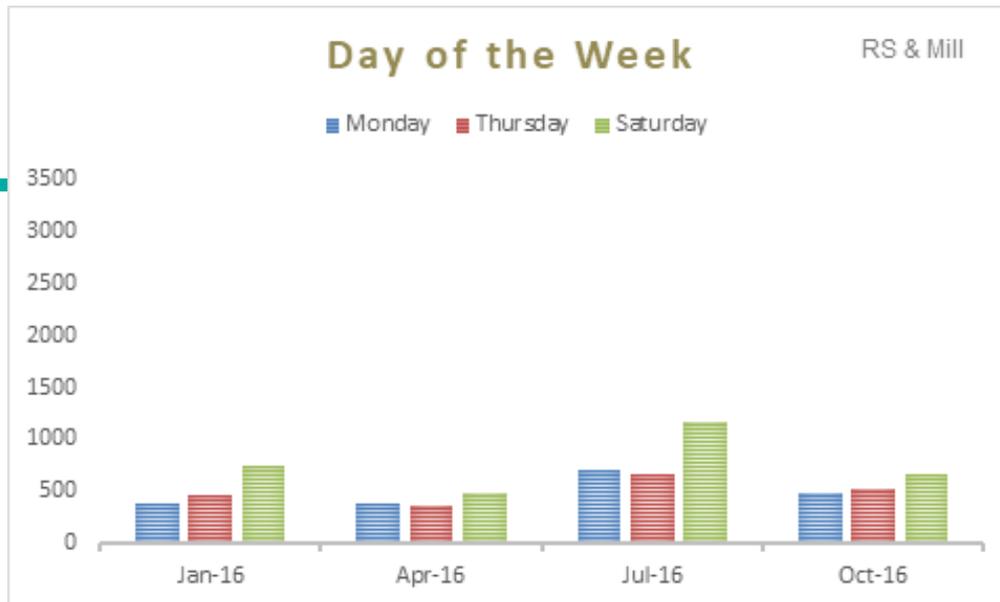


# Rio Salado & Mill - SW Corner

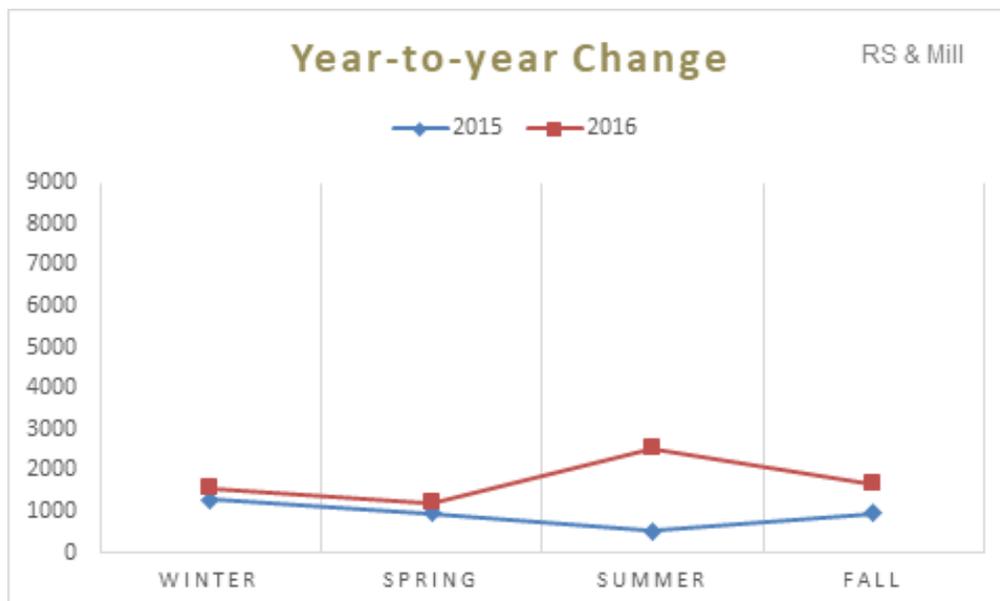
Rio Salado and Mill is the intersection most utilized for access to Tempe Beach Park. In addition many office workers likely cross through this intersection if they work at Hayden Ferry. Hayden Ferry Lakeside is a mixed use development that includes 1.6 million square feet of office, retail and residential. Both the SE and SW corners are slated for redevelopment but have no activity currently. It will be important to watch this intersection transition when these projects come to fruition.

Typically this point location is outside the denser section of Mill Avenue and sees lower counts. However, during the last week of July in 2016, the Pokemon phenomenon was in its height and people were in Tempe Beach Park at unprecedented numbers playing the game. This explains the quarterly spike we see in July, as well as the spike seen below during the 9pm count.





Without the Pokemon spike, 2016 would have likely had a similar pattern as 2015. However, it is notable that the counts across the quarters were higher in 2016, even without the abnormality.



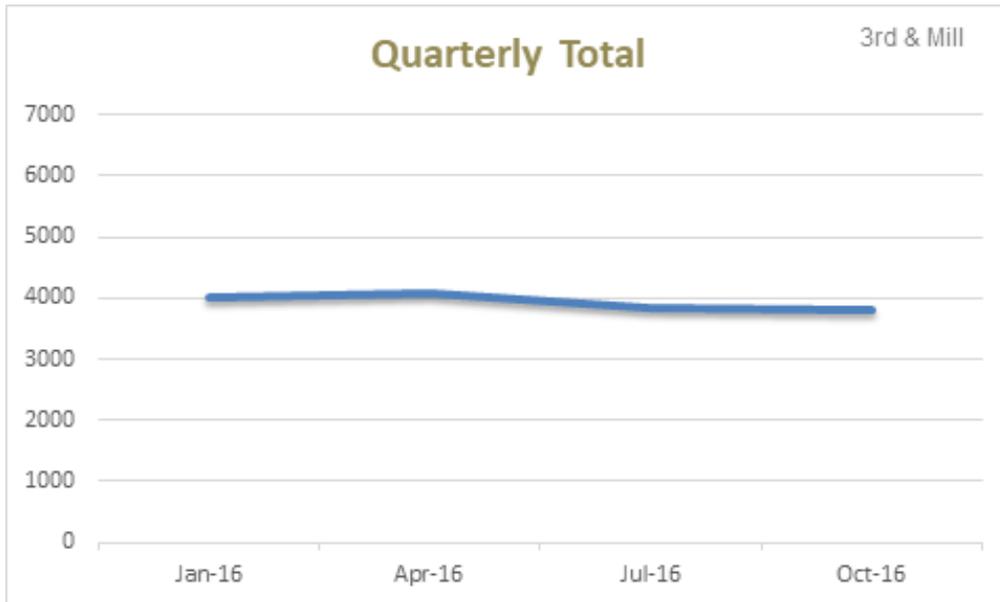


# Third Street & Mill Ave - SW Corner

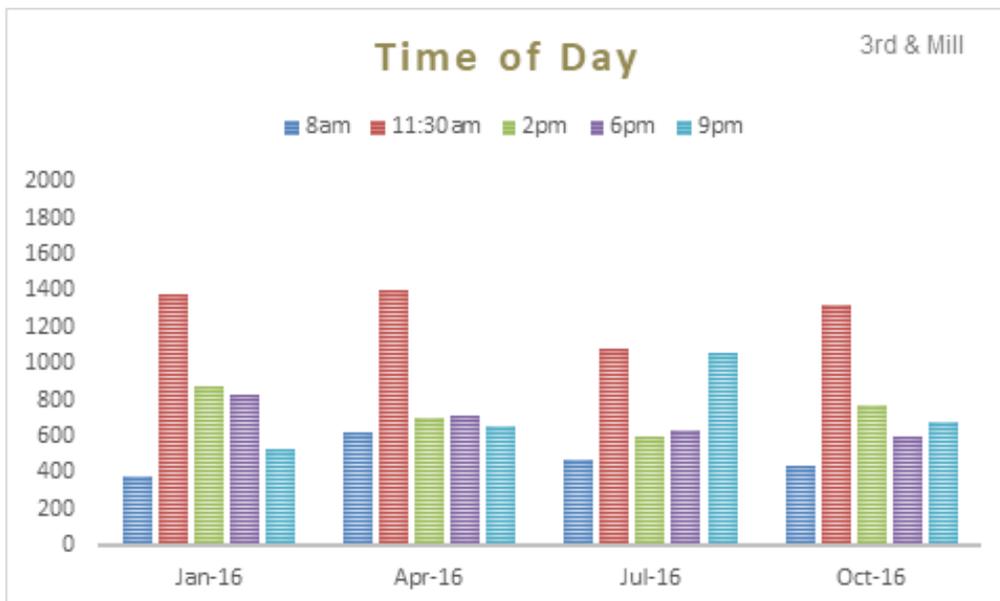




Third Street and Mill Avenue is the location of the second most utilized Valley Metro Lightrail stop in Downtown Tempe. During 2016 this stop saw 1,528 average daily boardings in 1st quarter, 1,390 in 2nd quarter, 1,323 in 3rd quarter and 1,411 in 4th quarter and 1,489 average daily departures in 1st quarter, 1,411 in 2nd quarter, 1,364 in 3rd quarter and 1,447 in 4th quarter. Other attractions at this intersection include Hayden Station, a five story office/retail complex and Mission Palms Hotel, a full service hotel with meeting space. (Light rail data from Valley Metro).



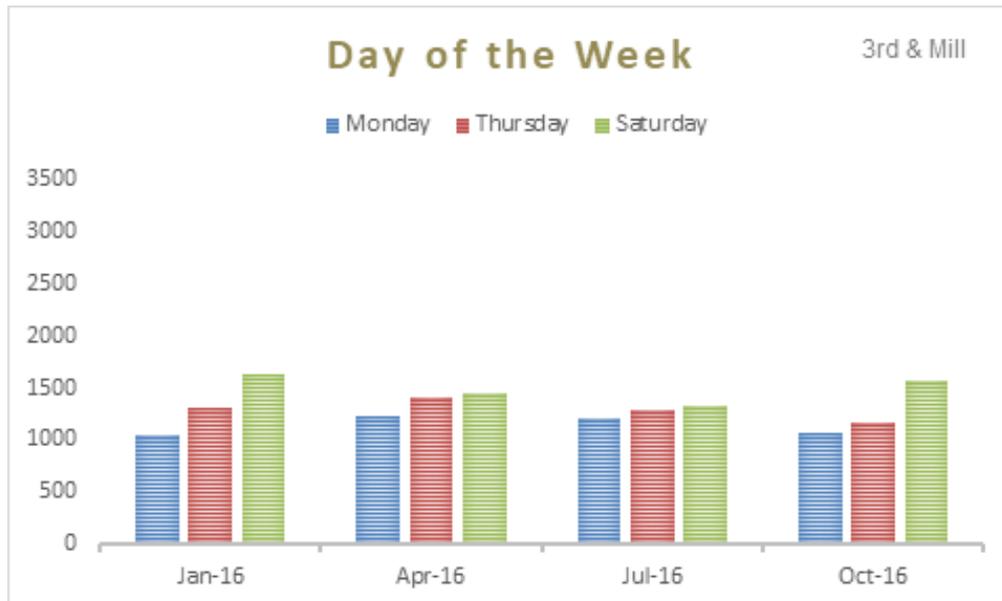
This intersection, with the light rail and other amenities, sees less seasonal variation than other intersections. In addition, there are many restaurants in the immediate area surrounding this location and thousands of office employees within walking distance, which creates a higher level of activity during the lunch hour than other times of day.





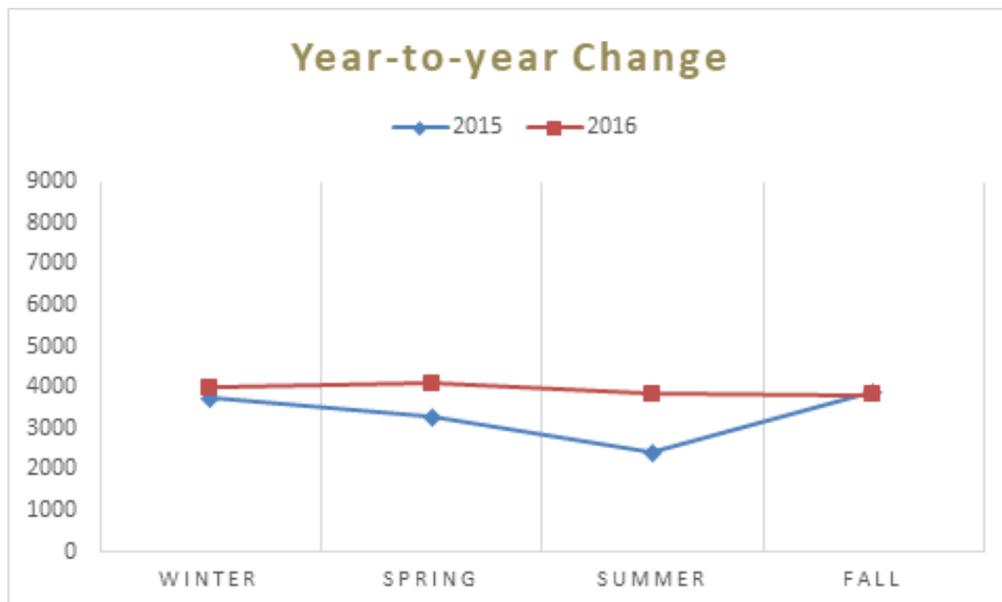
# Third Street & Mill Ave - SW Corner

With popular dining establishments, the light rail, close access to Tempe Beach Park and adjacency to “A” Mountain, it is not surprising that Saturday is the most highly counted day of the week at this location.



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This location saw an increase in foot traffic from 2015 in almost every quarter.





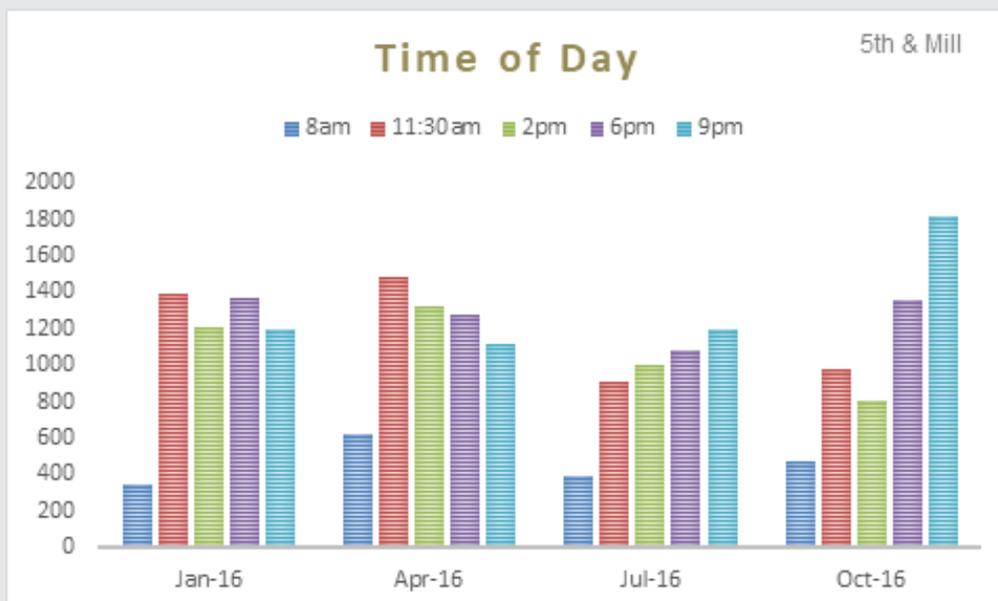
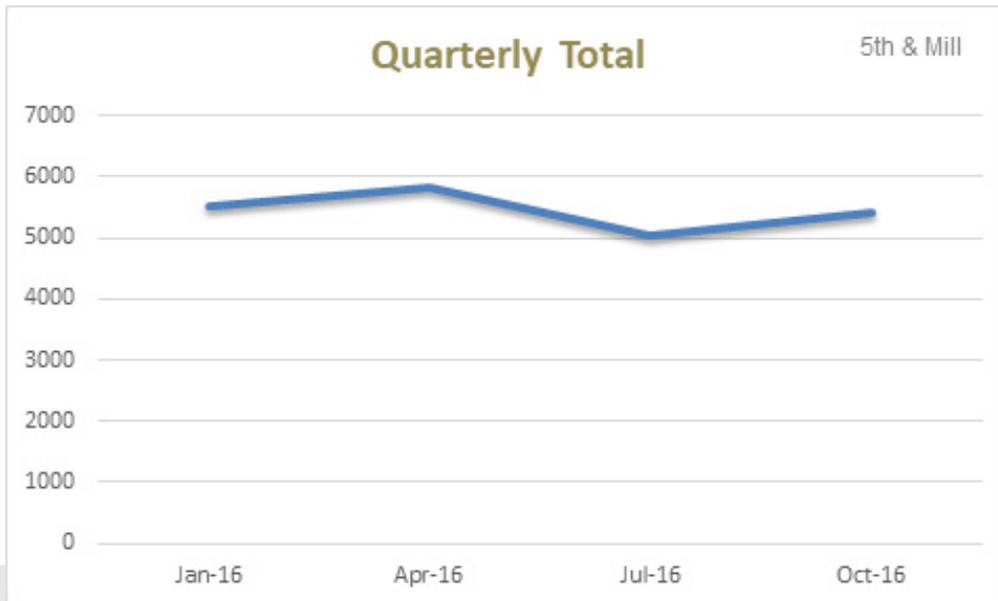
# Fifth Street & Mill Ave - NW Corner





# Fifth Street & Mill Ave - NW Corner

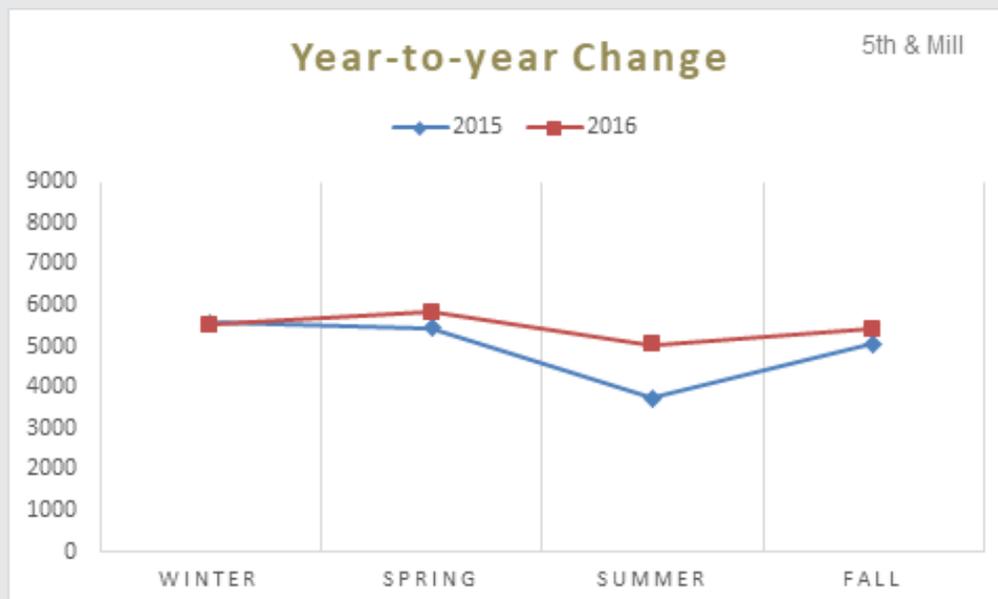
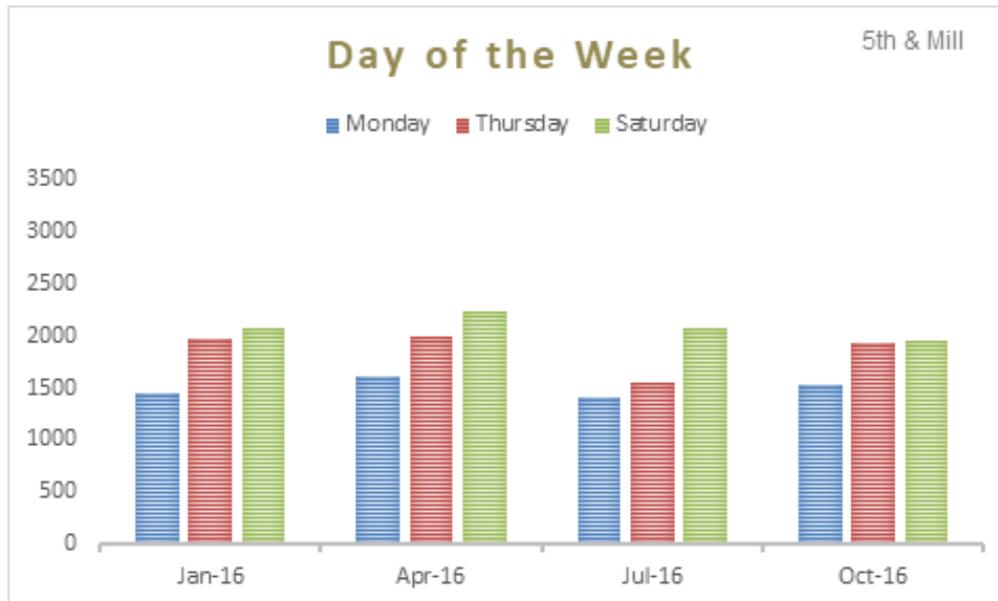
This intersection is considered the “bull’s eye” of Downtown Tempe. This is the most heavily transgressed intersection, on foot or in a vehicle, within the downtown. Currently located at this intersection is a Starbucks, Gordon Biersch, the US Post Office, and a few local restaurants and bars. Above street level there are offices as well. This intersection sees a great change from season to season and also the time of day when it is most often frequented.





# Fifth Street & Mill Ave - NW Corner

As with Third Street and Mill Avenue, Saturdays see the highest traffic days. It is encouraging to see that generally speaking, the summer months are not taking as much of a dip as previous years. We hope that this trend continues bringing more guests to Downtown Tempe even during the summer months.



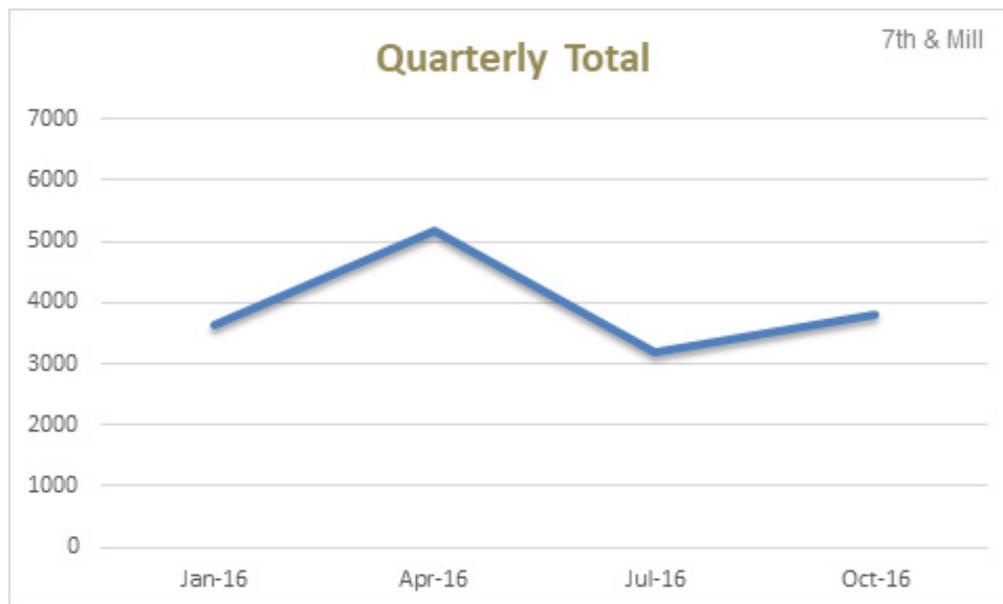


# Seventh Street & Mill Ave - SW Corner

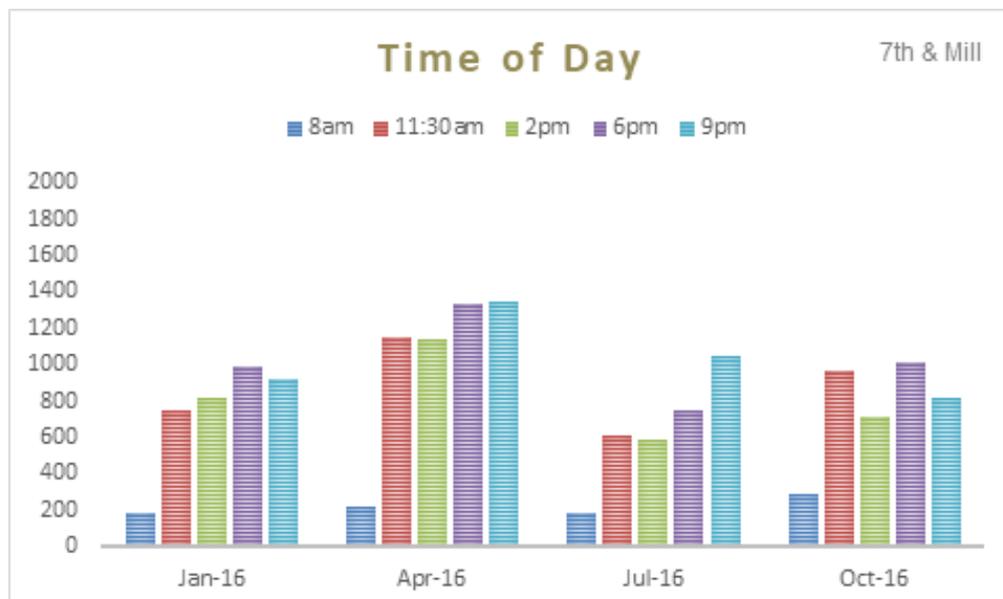




Seventh Street & Mill Avenue is an access point for Centerpoint Plaza where there is an AMC and many restaurants. Centerpoint is home to the annual holiday tree that is erected at the end of November and remains in place through the first week of January. These counts intentionally do not include that holiday traffic as not to skew the results. One corner of the intersection of Seventh & Mill remains vacant.

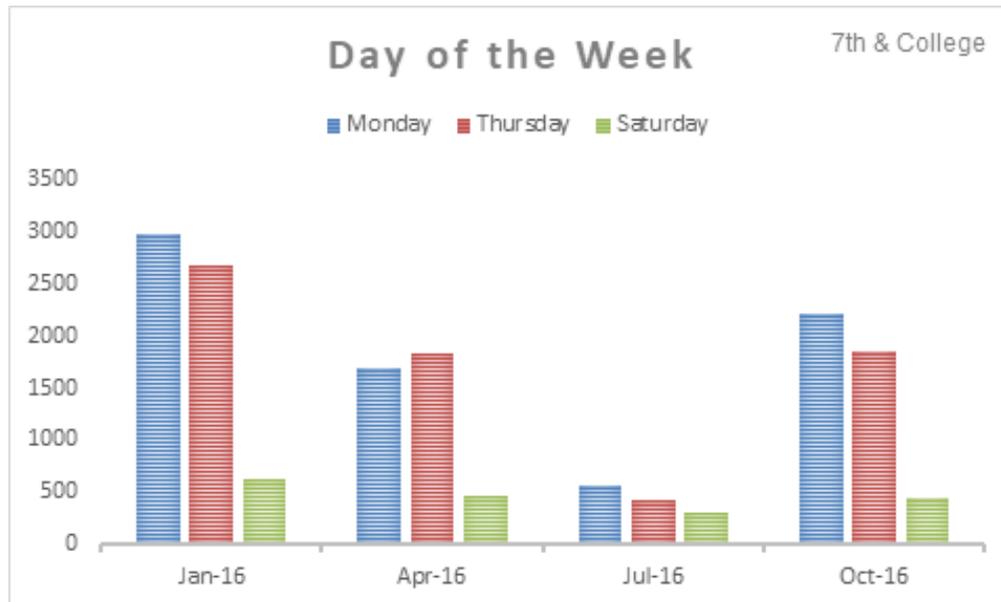


Home to more bars and restaurants that cater to sit down (rather than convenient meals), it would be expected that the evening counts would be higher at this location. This intersection should see an increase in foot traffic in August 2018 when the Opus Group Development completes and brings 407 residential units into the market.

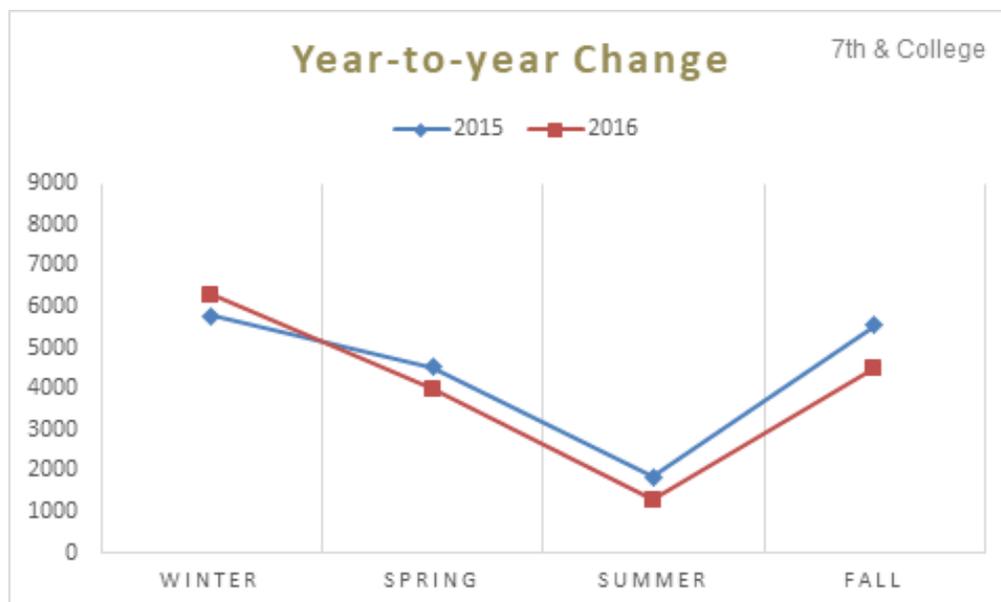




# Seventh Street & Mill Ave - SW Corner



Generally speaking, the intersection is performing better in 2016 than in 2015 with exception being the winter counts. These appear to be an anomaly as no major change occurred to cause the dip. We will watch this at future counts.



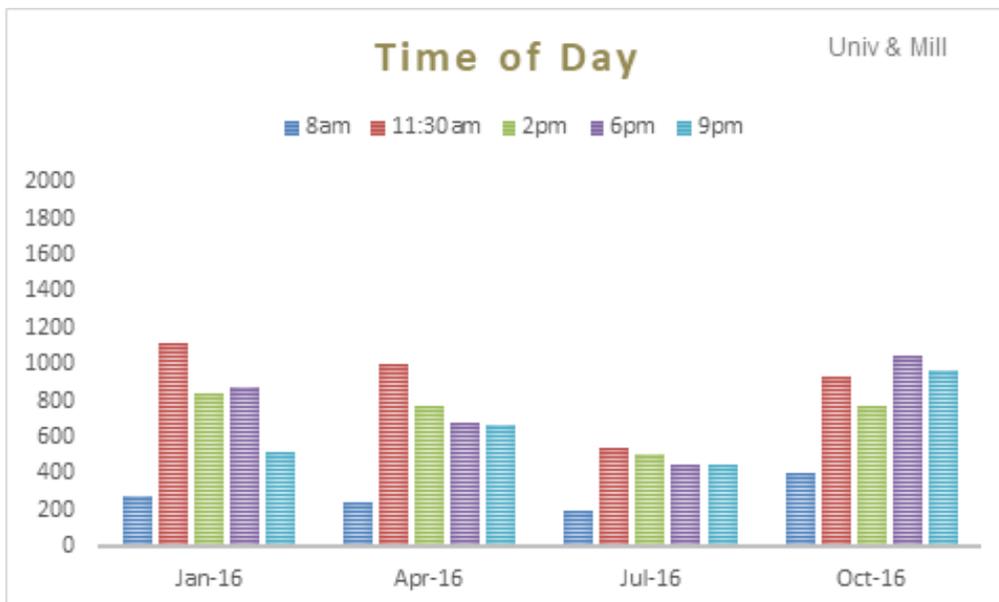
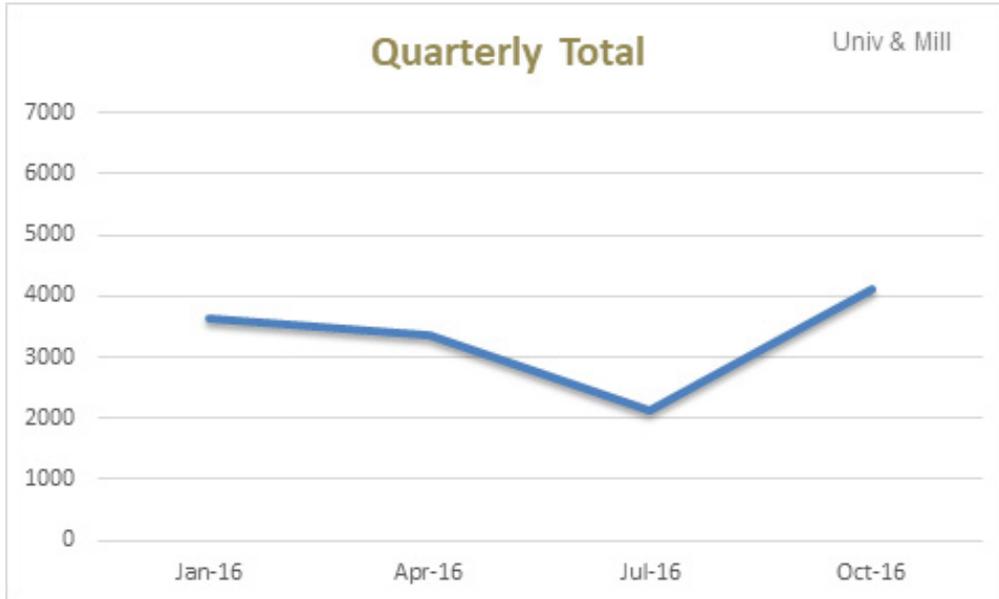


# University Drive & Mill Avenue - NW Corner



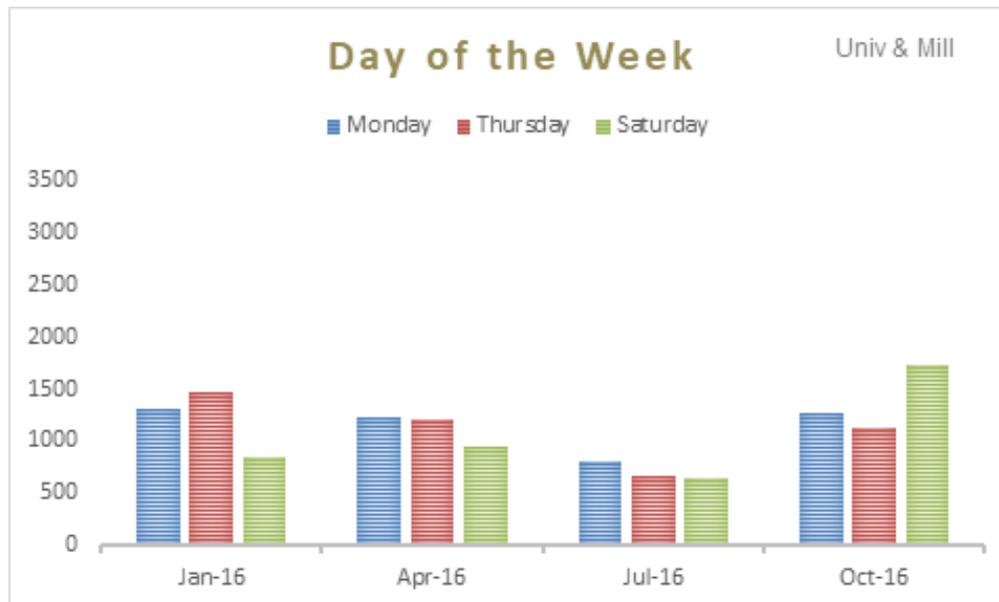


This intersection is viewed by many as the entry into Downtown Tempe, the beginning of the denser section of Mill Avenue. The enhanced services district managed by Downtown Tempe Authority officially begins at University and Mill and includes the properties on the north side of the intersection but not those on the south side. The intersection includes a PF Chang’s on the NW corner, a relatively new (November 2015) Pita Jungle on the NE corner, a CVS on the SW corner and vacant property on the SE corner.

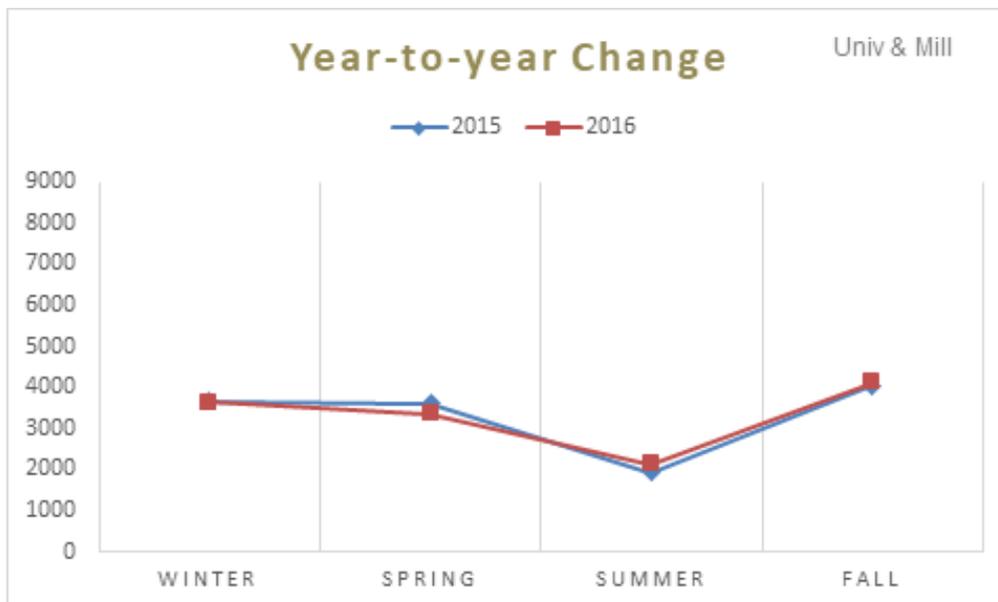




# University Drive & Mill Avenue - NW Corner



This intersection is seeing little to no change from 2015 to 2016. There will likely be development on the SE corner in the relatively near future and that should impact this activity in years to come.





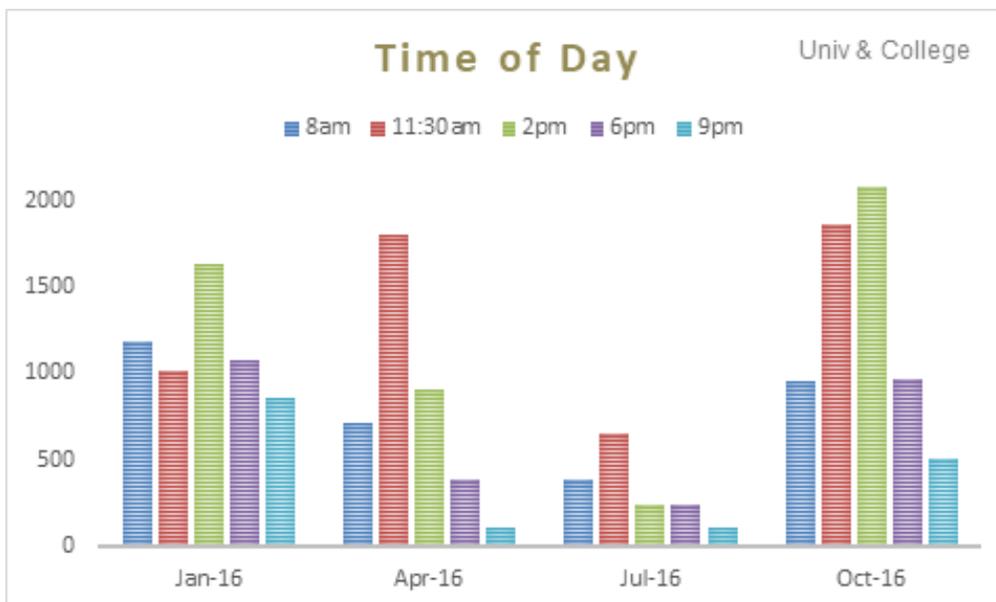
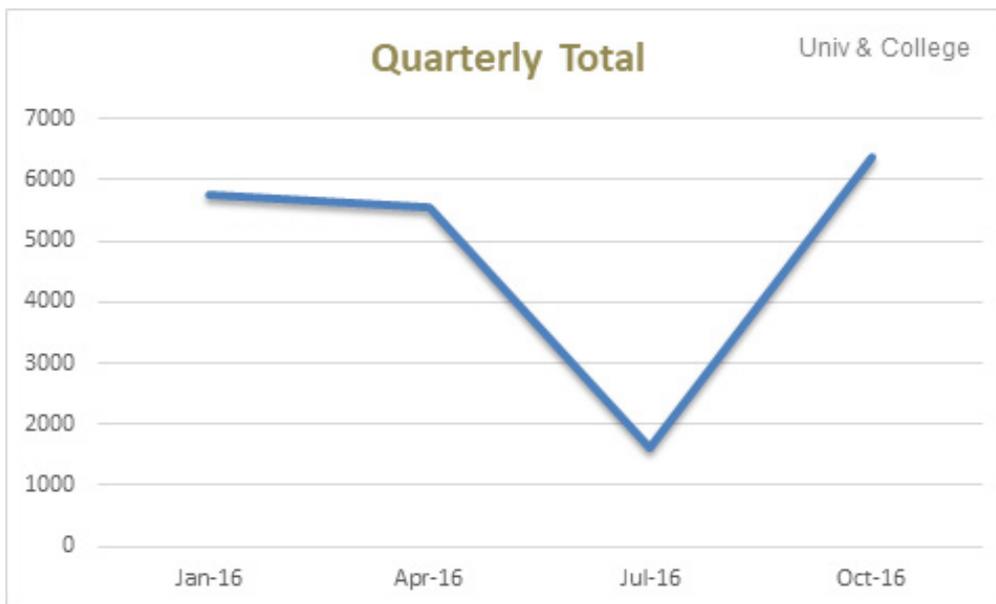
# University Drive & College Ave - NW Corner





# University Drive & College Ave - NW Corner

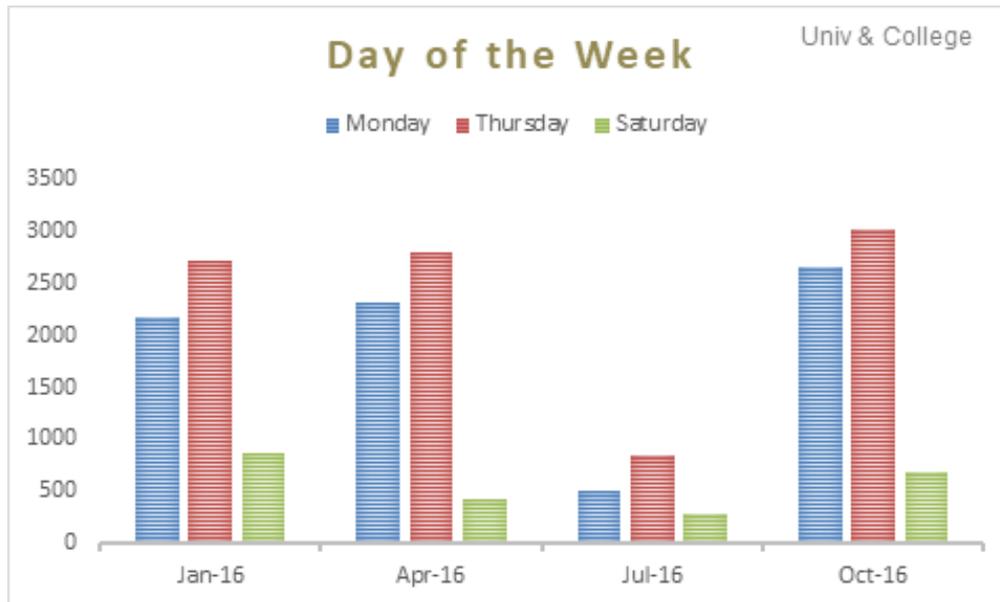
The Northwest corner of this intersection is home to All Saints Catholic Church. The Fulton Center (an ASU building) sits on the Northeast corner, and the entire south end of this intersection is ASU campus, including one of the main entrances. The Fulton Center houses the administration of ASU and the Foundation. Activity at this intersection is predominately all student driven.



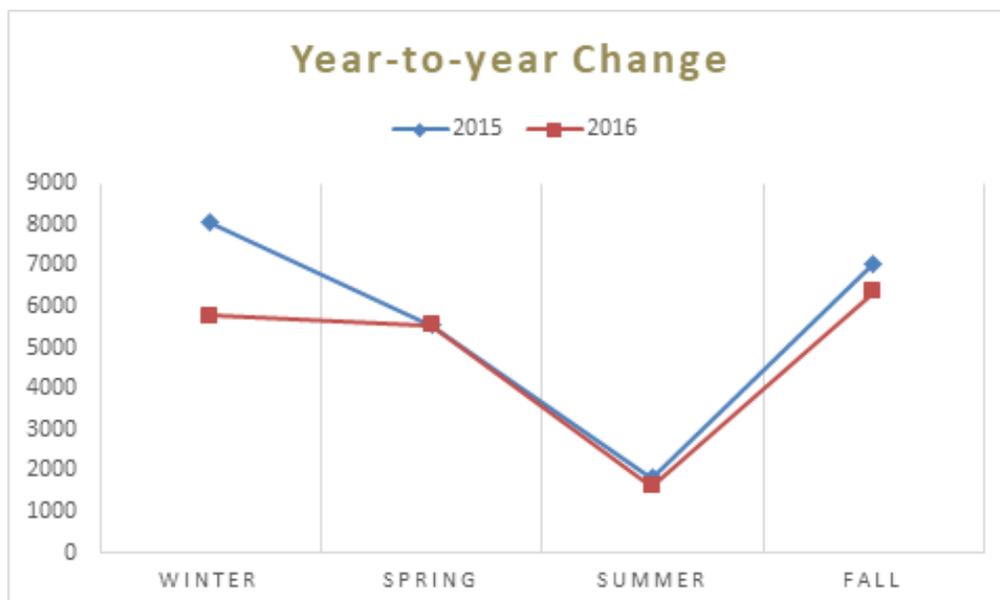


# University Drive & College Ave - NW Corner

Data for the Times of Day and the Day of the Week both fall in line with what would be expected of student behaviors. The greatest times of day are those when classes are in session and week days have the highest activity.



North of the church, a series of small businesses closed in the first quarter of 2015, including a clothing store, a sandwich shop, campus bookstore and a convenience store. It is likely that those stores continued to draw clients during the Winter 2015 counts but all the stores were closed by 2nd quarter 2015, creating a greater difference in the Winter counts. No new stores have replaced those decreasing the demand to access that block of College Avenue.





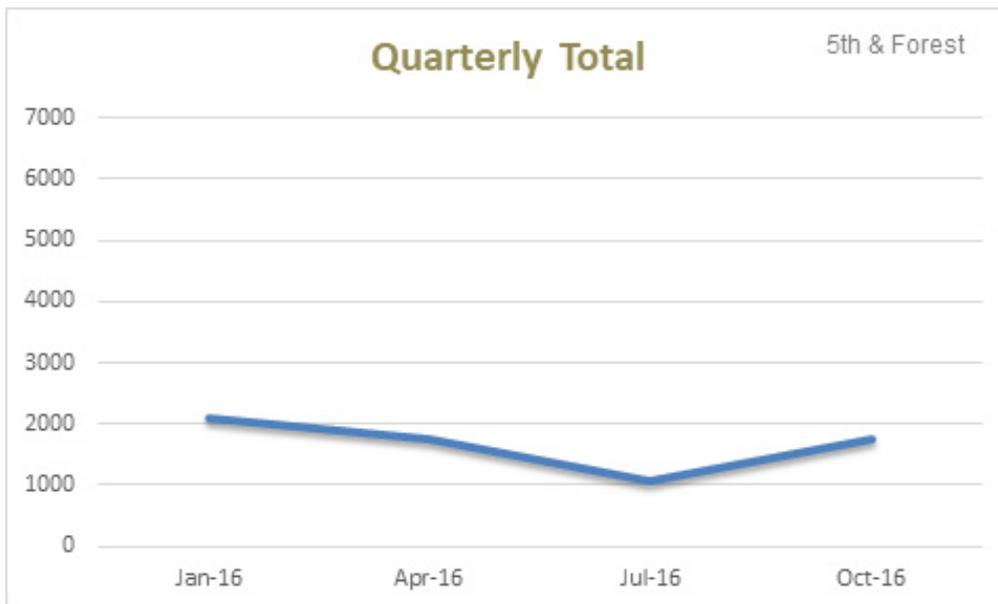
# Fifth Street & Forest Avenue - NW Corner



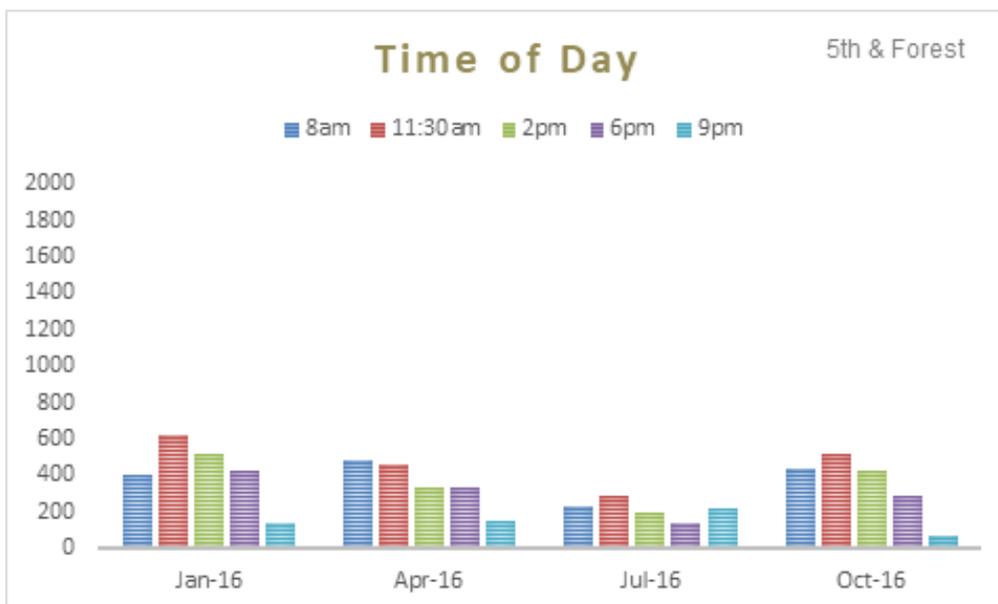


# Fifth Street & Forest Avenue - NW Corner

There is not a great deal of pedestrian traffic at this intersection. There are few restaurants and bars at this intersection. However, it is the location of the 2nd and more highly used Valley Metro Lightrail stop at the City of Tempe Transportation Center. The stop saw 1,825 Average Daily Boardings in 1st quarter 2016, 1,479 in 2nd quarter, 1,707 3rd quarter and 1,759 4th quarter. There were 1,994 average daily departures in 1st quarter, 1,617 in 2nd quarter, 1,845 3rd quarter and 1,891 in 4th quarter.



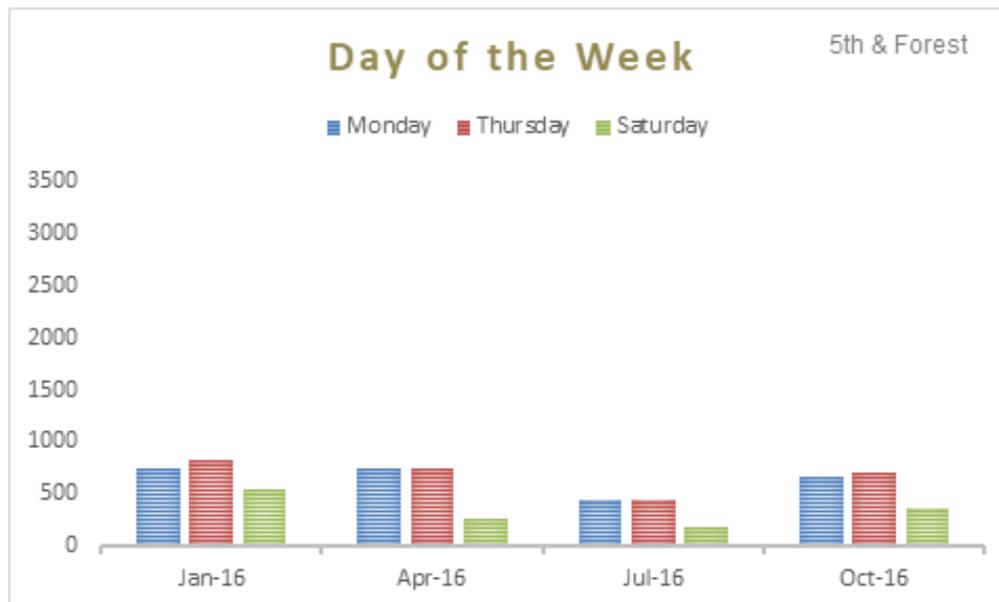
There are many civic uses within a block of this intersection, such as City Hall, the Tempe Police Department's Headquarters and the affiliated courts. Also, there is a public parking garage near this intersection and a Marriott Residence Inn on Forest.



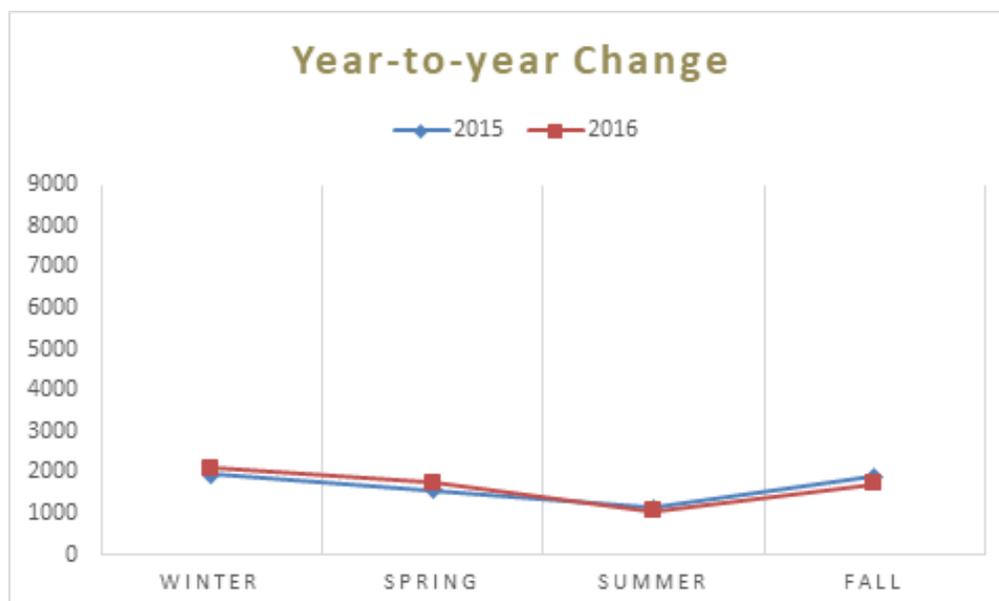


# Fifth Street & Forest Avenue - NW Corner

Without a great deal of restaurants and bars in the immediate vicinity and a more civic focus, it is logical that the foot traffic is more confined to week days as office workers are coming to and from various meetings.



The location is seeing little change from 2015 to 2016.



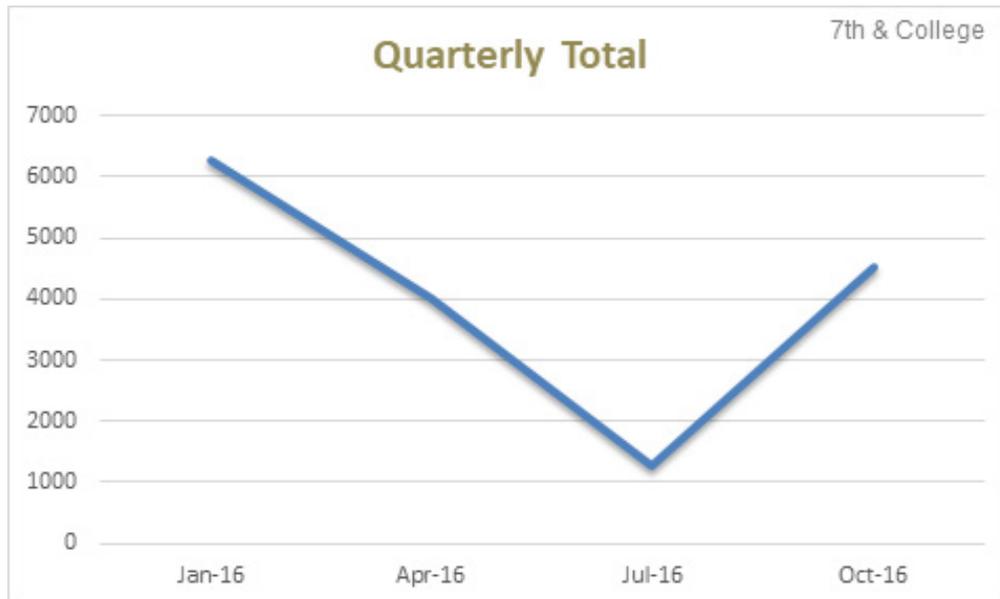


# Seventh Street & College Avenue - SW Corner

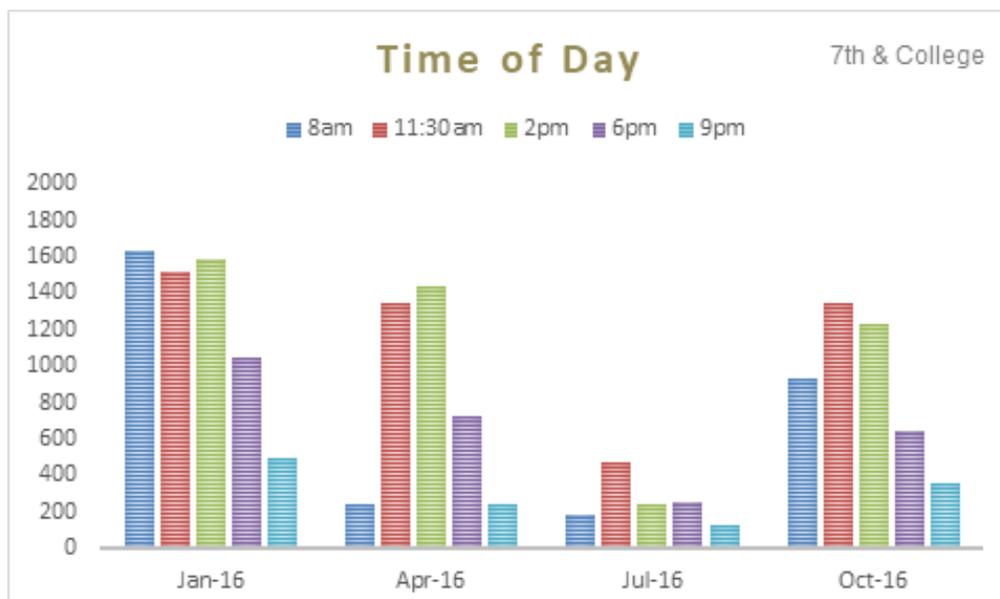




This intersection is in close proximity to Postino and Snooze (two popular eating establishments) as well as the College Avenue Commons (CAVC). CAVC is a university property that includes classrooms, a campus store, a marketplace, and an auditorium used to begin campus tours. The location sees a great deal of activity during the school year and experiences a significant dip when school is not taking place during the summer. While the restaurants report stronger sales in 2016 compared to 2015, guests are likely coming to the restaurants from a variety of entry points.



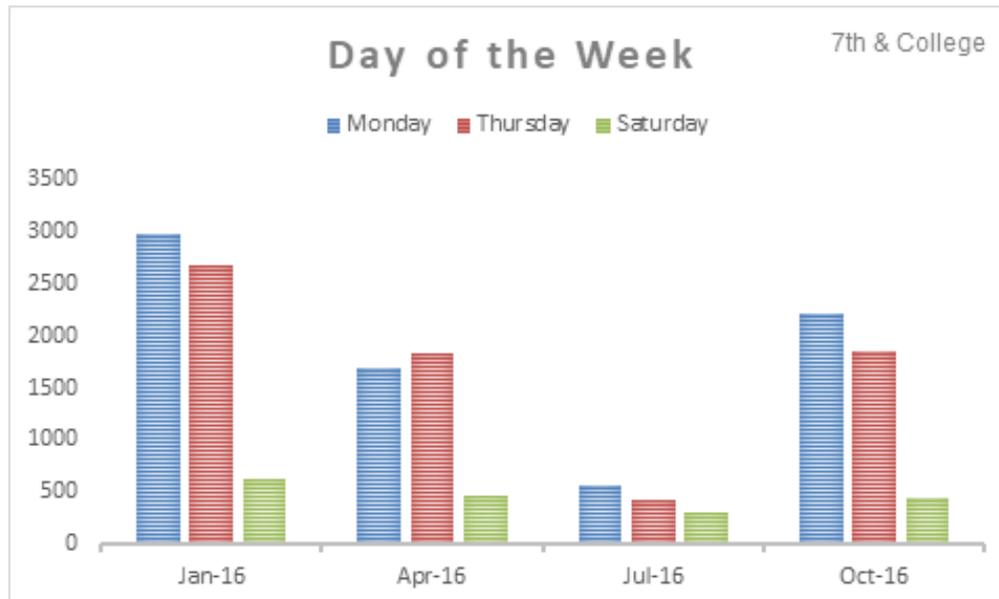
One would expect the 9pm count to be the least active at this location, given the use. There are no late night establishments in this immediate area.





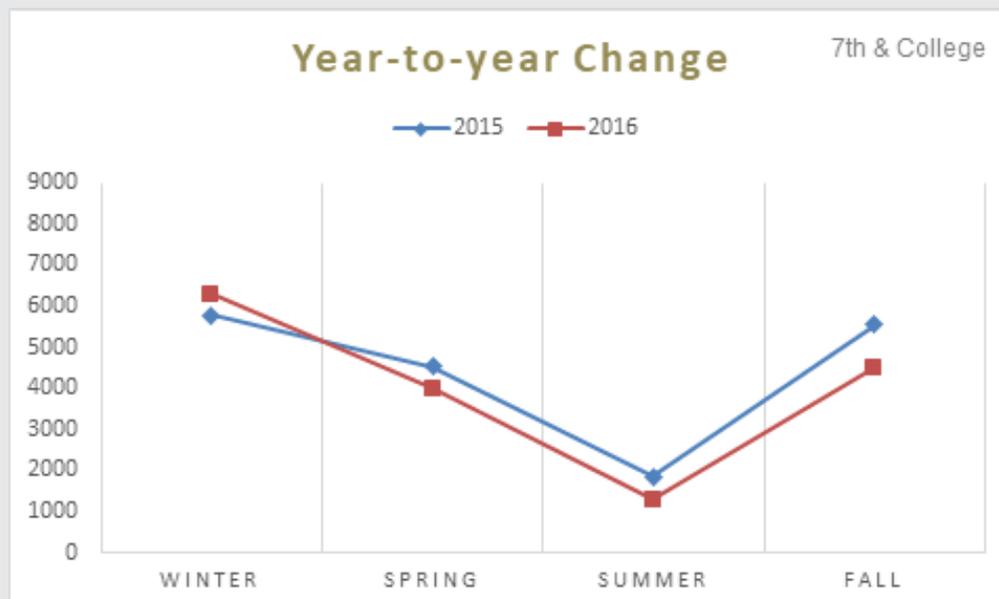
# Seventh Street & College Avenue - SW Corner

Mondays and Thursdays see the highest traffic due to restaurant and university activity.



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There is no obvious explanation as to why the location saw a decrease in activity from 2015 to 2016.





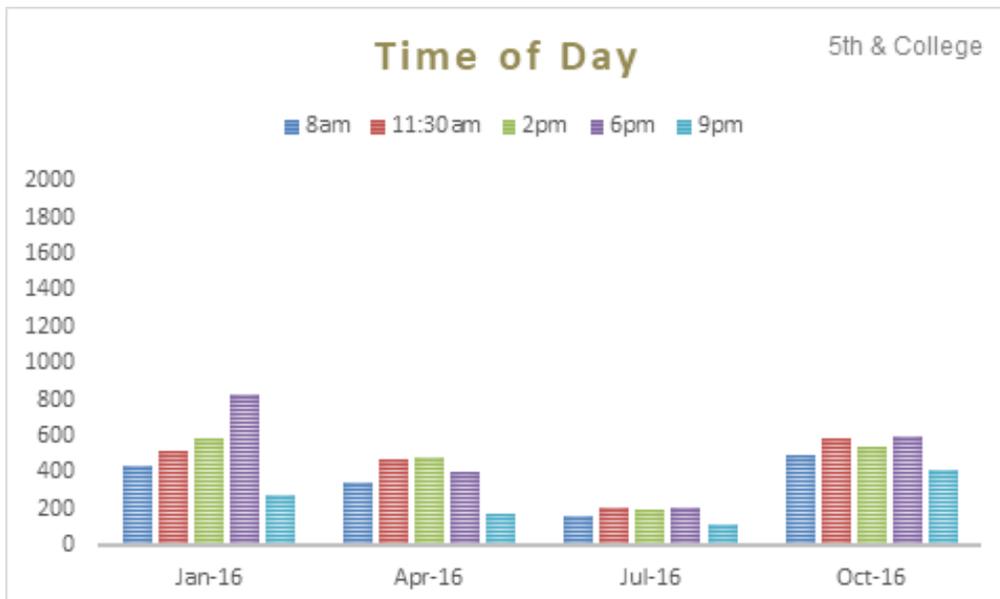
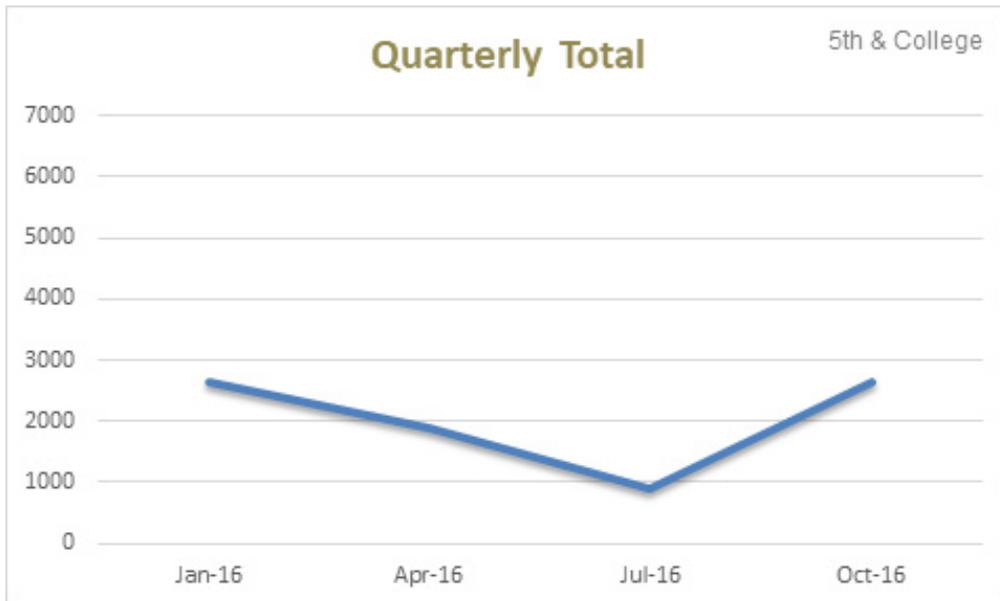
# Fifth Street & College Ave - SW Corner





# Fifth Street & College Ave - SW Corner

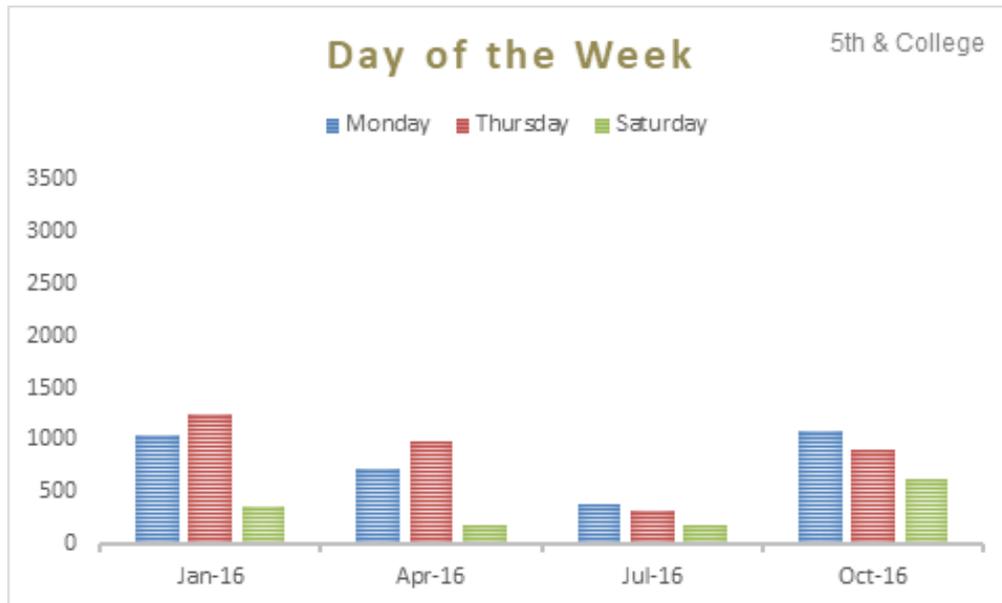
This intersection is closest to Sun Devil Stadium and in closer proximity to university uses rather than traditional downtown uses. The main floor of the building on the SE corner is vacant, the SW corner is office use mainly with a few smaller restaurant/bars and the north side of the street leads to "A" Mountain with no commercial uses other than the stadium. These counts were not conducted when a home game was taking place to ensure that those attendees did not skew the results.



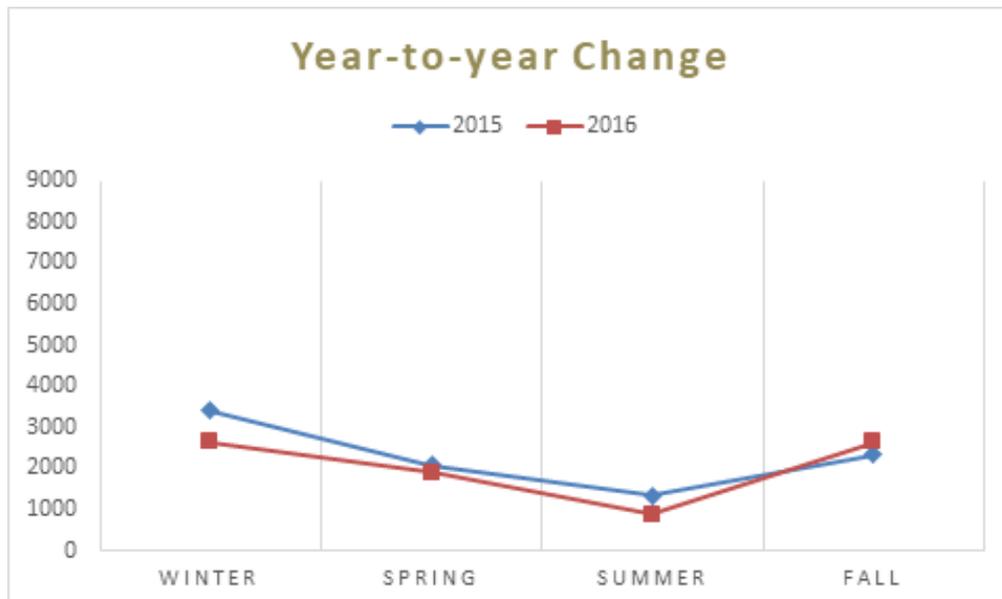


# Fifth Street & College Ave - SW Corner

Given that this location is highly driven by educational uses and guests, it is logical that the summer count shows a reduction and that Saturdays have the weakest performance.



This location is experiencing a decrease in activity from the prior year with no obvious reason, such as a larger establishment closing.





# Locations at a Glance

This table represents the number of individuals counted at each location for the total of all four quarterly counts. Locations are listed in order of highest to lowest pedestrian counts (based on the most recent year) with their percent of change from the previous year. Of the nine locations, five reported an increase in pedestrian traffic; three showed a decrease in pedestrian traffic and one location showed virtually no change.

NOTE: Total sales for the Downtown Tempe Enhanced Services District (as reported by the City of Tempe) have shown an increase in restaurant/bar sales and in retail sales. Specifically, total sales for the entire calendar year increased 5.14% for Retail and 4.99% for Bars/Restaurants.

| RANK | LOCATION             | TOTAL 2015 | TOTAL 2016 | % CHANGE |
|------|----------------------|------------|------------|----------|
| 1    | Fifth & Mill         | 19,854     | 21,818     | + 10%    |
| 2    | University & College | 22,500     | 19,319     | - 14%    |
| 3    | Seventh & College    | 17,715     | 16,071     | - 9%     |
| 4    | Seventh & Mill       | 13,786     | 15,808     | + 15%    |
| 5    | Third & Mill         | 13,334     | 15,734     | + 18%    |
| 6    | University & Mill    | 13,253     | 13,242     | 0%       |
| 7    | Fifth & College      | 9,157      | 8,058      | - 12%    |
| 8    | Rio Salado & Mill    | 3,753      | 7,017      | + 87%    |
| 9    | Fifth & Forest       | 6,532      | 6,674      | + 2%     |



# Future Considerations

**Adding Locations:** It is important for us to include locations that currently aren't densely used if there are plans to develop them in the future. A baseline count would help to establish the impact of future projects. Therefore, we should consider adding collection points along Farmer Avenue in anticipation of the residential project, the grocer and the office project all slated for the currently vacant land between Ash and Farmer.

**Times of Day:** The 9pm to 10pm count does not capture the true nighttime economy, therefore it might be prudent to move that count time to begin two hours later at 11pm.

As more collection sites are added, and development occurs, it will be critical to see how those locations reflect activity happening in the core of downtown. This will help to determine if there is overall growth or internal cannibalizing.

There are several development projects in various stages that will no doubt impact future pedestrian counts over the next few years. The City of Tempe maintains a powerful economic development map with GIS technology at <http://tempegov.maps.arcgis.com/home/index.html> (scroll over for Tempe Development Projects).

Currently in construction is the Opus Group project on 7th Street slated to open in August 2018 which will include 407 residential units and 30,000 square feet of retail/restaurant space. Breaking ground shortly is The Local, a project of Forum Real Estate Group, with a Whole Foods and 286 residential units on the corner of Ash and University. For a complete mapping of projects that have begun the review process, visit the portal linked above.



## CONTACT US

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