



Smart Growth America

Improving lives by improving communities

# Foot Traffic Ahead 2023

Ranking Walkable Urbanism in America's Largest Metros

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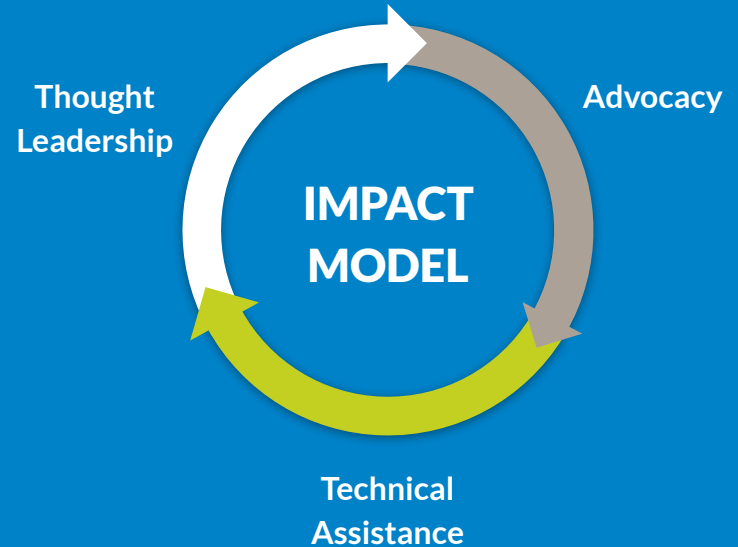
# ABOUT SGA

## OUR NORTH STAR

Smart Growth America envisions a country where no matter where you live, or who you are, you can enjoy living in a place that is healthy, prosperous, and resilient.

## OUR MISSION

Smart Growth America empowers communities through technical assistance, advocacy, and thought leadership to realize our vision of livable places, healthy people, and shared prosperity.



# Introduction

The Foot Traffic Ahead 2023 report from Places Platform and Smart Growth America describes the shifts in metropolitan region and sub-market demand, relative momentum toward economic sustainability, and the market effects of the COVID-19 pandemic.

Building Foot Traffic Ahead reports since 2014, this year's installment continues to track the trends of walkable urbanism within the **35 largest metropolitan areas** of the U.S.

These unique insights are possible because of our unified understanding of Land Use Form and Economic Function of Land, is a powerful innovation that can help address the structural challenges of valuation, affordable housing, social equity, and market liquidity.

# MAJOR FINDINGS

# Form/Function Matrix



**WALKABLE  
URBAN**

**REGIONALLY SIGNIFICANT**



**WALKUP Type I**  
0.2% of Land

**LOCAL SERVING**



**WALKABLE  
NEIGHBORHOOD Type II**  
1.0% of Land



**DRIVABLE  
SUB-URBAN**



**DRIVE-IN Type III**  
5.2% of Land



**DRIVABLE  
COMMUNITY Type IV**  
93.7% of Land

*Percentages reflect land in the  
35 largest Metro Areas*

*Places Platform refers to the  
Form/Function Matrix as the Places Lens™*

# Major Findings

- 1 People continue to choose walkable places
- 2 Limited supply and high demand for walkable places will continue to drive up costs and reduce affordability
- 3 Covid-19 slightly reduced demand, but preference for walkable places remains
- 4 Type II places—walkable neighborhoods—are growing and are an opportunity to grow walkable urbanism



A photograph of a busy urban sidewalk. In the foreground, a woman in a red plaid shirt and a face mask walks hand-in-hand with a young girl in a striped shirt and a yellow face mask. To their right, a stroller is being pushed. In the background, other pedestrians are walking, and a sign for 'THE WIARD' is visible. The scene is set in a sunny, urban environment with trees and buildings.

# People continue to choose walkable urban places

THE WIARD  
Ward, DC Metro

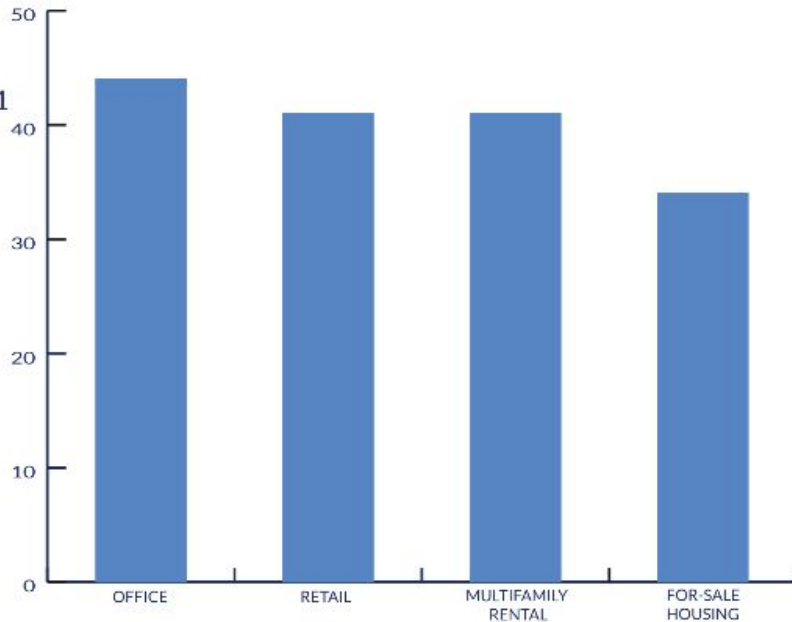
- We celebrate diversity.
- We embrace humanity.
- We value black lives.
- We respect women.
- We stand with immigrants.
- We support the LGBTQ community.
- We are united with people of all faiths.
- We embrace people with disabilities.
- We encourage young people.
- We cherish seniors.
- We welcome everyone.

YOU BELONG HERE.



# Price Premiums for Walkable Urbanism

PRICE PREMIUMS FOR  
WALKABLE URBANISM  
VS. DRIVABLE SUB-URBAN, 2021



All Walkable urban product types have **significant price/rent premiums** in all 35 of largest US metros





Limited supply & high demand for walkable places will continue to **drive up costs** and reduce affordability





**COVID-19** slightly reduced demand, but preferences for walkable places **remain**



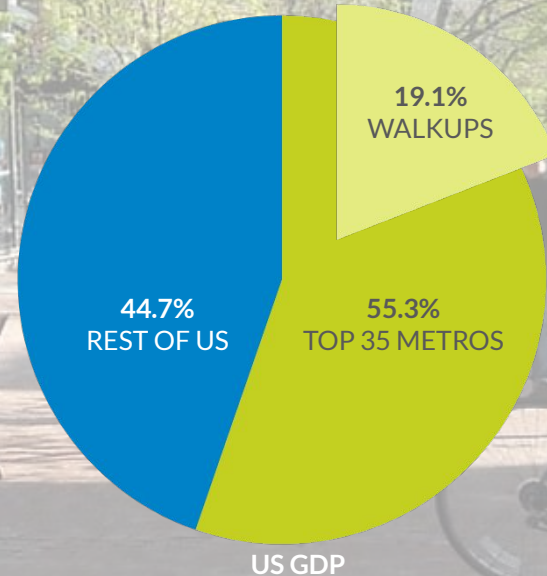
**Type II places**—walkable neighborhoods—are growing, and present an **opportunity** to grow walkable urbanism



# Economic opportunity is concentrated in walkable places

Nearly one-fifth of  
US GDP is located in  
walkable urban places

1.2% of total land  
mass in WalkUPs



US GDP

Source: U.S. Bureau of Economic Analysis



Walkable places generate an enormous **range of benefits**



A photograph of a city street scene. In the foreground, a person wearing a dark jacket and blue pants is walking across a brick-paved crosswalk. The crosswalk is marked with white lines on a dark asphalt road. In the background, there are multi-story brick buildings with arched windows and doorways. A green street lamp stands on the sidewalk. A blue semi-transparent banner is overlaid on the middle of the image, containing white text. The text reads: "Key actions are needed to grow equitable walkable urbanism".

**Key actions** are needed to grow  
**equitable** walkable urbanism





There is a lack of resources to build enough  
**housing to meet demand**

# RANKINGS



# Foot Traffic Ahead - Tops & Bottom Rankings

REGION	RANK	OFFICE SHARE	MULTIFAMILY RENTAL SHARE	RETAIL SHARE	FOR SALE SHARE	COMBINED SHARE	FOOT TRAFFIC AHEAD INDEX
New York	1	73.2%	70.3%	59.1%	17.9%	35.1%	100
Boston	2	47.3%	44.4%	11.2%	24.6%	27%	74.3
Washington, DC	3	55.6%	34.1%	12.4%	8.6%	15.5%	72.6
Seattle	4	60%	37.1%	19.4%	12.4%	18%	69.4
Portland	5	54.3%	36.7%	26.7%	20.8%	24.1%	68.5
San Francisco	6	38%	35.4%	22.2%	21.2%	24%	66.2
Chicago	7	52.7%	44.8%	10.8%	15.2%	18.7%	65.9
Los Angeles	8	42.3%	30.5%	21.3%	17.3%	19.6%	59
Indianapolis	29	23.9%	7.3%	5.5%	1.9%	3.5%	36.4
Tampa	30	21.1%	11.7%	5.1%	6.6%	7.4%	35.4
Virginia Beach	31	17.5%	6.3%	14.3%	2.6%	4.4%	34.5
Phoenix	32	17.9%	9.3%	3.8%	1.7%	3.2%	33.6
Orlando	33	19.8%	8.4%	6.3%	3.7%	5%	32.4
San Antonio	34	15.1%	5.5%	5.2%	2.3%	3.3%	29.4
Las Vegas	35	6.5%	4.4%	7.4%	1.4%	2.5%	27.5



# Social Equity Index





# Social Equity Index

Significant amounts of WalkUPs in a region doesn't mean that walkability is accessible and evenly distributed.

\$ Affordability

🚦 Accessibility, ⌚ Transit Quality

🚶 Distance to Walkability

Cleveland, Kansas City, and Detroit rank highly - affordable housing & walkability access. NYC ranks highly due to transit network, in spite of high housing costs.





# Social Equity Index

REGION	SEI RANK	AFFORDABILITY INDEX	TRANSIT INDEX	PROXIMITY INDEX	SOCIAL EQUITY INDEX (SEI)
Cleveland	1	61	57.6	67	61.8
<b>New York</b>	<b>2</b>	<b>34</b>	<b>91.1</b>	<b>52.1</b>	<b>59.1</b>
Kansas City	3	66	51.1	58.3	58.5
Detroit	4	55	50.5	68.6	58.2
Philadelphia	5	50	73.7	48.8	57.5
Pittsburgh	6	58	64.5	49.7	57.3
Baltimore	7	55	59.1	54.7	56.4
<b>Washington DC</b>	<b>8</b>	<b>49</b>	<b>78.7</b>	<b>41.2</b>	<b>56.2</b>
Cincinnati	9	57	54.5	56.5	55.8
Minneapolis-St. Paul	10	58	57.9	50.1	55.5
St. Louis	11	63	45.2	57.6	55.4
<b>Boston</b>	<b>12</b>	<b>46</b>	<b>69.4</b>	<b>49</b>	<b>54.7</b>
Indianapolis	13	64	45.7	54.5	54.6
<b>Chicago</b>	<b>14</b>	<b>51</b>	<b>68.7</b>	<b>41.5</b>	<b>53.7</b>
San Antonio	15	52	47.2	60.7	53.4
Las Vegas	16	40	59.6	59.9	53.3
<b>Seattle</b>	<b>17</b>	<b>46</b>	<b>72.7</b>	<b>39.8</b>	<b>52.7</b>

Denver	18	57	46.4	53.4	52.4
Phoenix	19	51	48.7	54.7	51.5
Sacramento	20	55	51.7	47.9	51.4
Houston	21	45	43.3	65	51.1
<b>San Francisco</b>	<b>22</b>	<b>47</b>	<b>65.2</b>	<b>39.3</b>	<b>50.4</b>
Charlotte	23	57	60.8	32	49.8
Virginia Beach	23	49	44.5	55.8	49.8
Columbus	25	59	41.7	47.7	49.4
<b>Portland</b>	<b>26</b>	<b>54</b>	<b>55.1</b>	<b>38.9</b>	<b>49.3</b>
Atlanta	27	50	54.6	41	48.4
Austin	28	53	46.4	43.3	47.4
Dallas-Fort Worth	29	51	42.3	44.1	45.9
Orlando	30	48	35.5	50	44.5
Nashville	31	45	40.4	46.9	44.1
San Diego	32	35	48.8	41.6	41.8
Miami	33	26	48.4	50.7	41.5
Tampa	34	36	39.6	48.8	41.3
<b>Los Angeles</b>	<b>35</b>	<b>31</b>	<b>48</b>	<b>39</b>	<b>39.5</b>

Green shade indicates Top 8 (Level 1) regions in our Foot Traffic Ahead rankings.





# Future Momentum



# Future Momentum

Identifies which markets are improving walkability, and may be ready to further expand walkability.



Market Shift Share



Net Absorption Trends



Price Premiums

Regions that expand walkability can enhance social equity by providing diverse communities of people with more convenient and amenity-rich places to access opportunity and live healthy and thriving lives.





# Market Shift Share

Measures how much absorption has shifted as compared to the base of the market share

$$MSS = \frac{\text{Walkable Urbanism Absorption} / \text{All Positive Absorption}}{\text{Walkable Urbanism Inventory} / \text{All Inventory}}$$

We find that in almost every market, walkable urbanism grew far faster than its base market as indicated in the Market Shift Share. There was 2.8x growth compared 2017 Market Share Shift.

REGION	FUTURE MOMENTUM RANK	NET ABSORPTION AS A % OF MARKET	MARKET SHARE SHIFT
Las Vegas	22	5.7%	14.4
San Antonio	10	6.8%	8.3
Virginia Beach	12	3.3%	6.6
San Diego	5	2.4%	6.5
Indianapolis	29	2.9%	6.3
Sacramento	9	1.7%	6.2
Orlando	8	8.3%	5.1
Columbus	17	3.7%	4.8
Phoenix	25	4.1%	4.6
Kansas City	27	3.4%	4.3
Atlanta	7	2.7%	4.1
Dallas-Fort Worth	6	3.8%	3.9
Cleveland	26	1.0%	3.8
Detroit	30	0.9%	3.4
Baltimore	13	0.9%	3.4
Houston	19	2.3%	3.3
Tampa	1	3.9%	3.3
Philadelphia	20	1.5%	3.2
Nashville	2	6.3%	3.2
Cincinnati	31	1.3%	3.1
Charlotte	11	7.1%	3.1
St. Louis	34	0.4%	2.7
Denver	24	3.6%	2.6
Los Angeles	23	1.3%	2.5
Chicago	18	0.4%	2.1
Austin	16	6.0%	2.1
Miami	3	4.1%	1.9
WT. AVG	2.2%		2.8

Green shade indicates Top 8 (Level 1) regions in our Foot Traffic Ahead rankings.



# Future Momentum Index

**Bold Growth** - Significant population growth and opportunities for expansion in walkability

*above average Current and Future indices*

**Future Vision** - Significant population growth, walkability momentum, urbanizing sub-urban areas

*below average Current Index, above average Future Index*

**Mature Walkable** - May have potential to grow walkability but current inventory is above average

*below average in the Future Index*

**Room for Growth** - Opportunities to improve regional walkability, slower population growth

*below average based on both indices*

## Current Index

		BELOW AVERAGE	ABOVE AVERAGE
Future Index	ABOVE AVERAGE	<b>FUTURE VISION</b> Atlanta Baltimore Nashville Sacramento Dallas-Fort Worth San Diego Tampa Virginia Beach Orlando San Antonio	<b>BOLD GROWTH</b> Boston Washington, DC San Francisco Miami Charlotte
	BELOW AVERAGE	<b>ROOM FOR GROWTH</b> Denver Cleveland Houston Columbus Kansas City St. Louis Cincinnati Detroit Indianapolis Phoenix Las Vegas	<b>MATURE WALKABLE</b> New York Seattle Portland Chicago Los Angeles Minneapolis-St. Paul Pittsburgh Philadelphia Austin Los Angeles



# Recommendations

## 1. Grow the supply of equitable, walkable urban places

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Advance zoning reform to encourage the development of more mixed-use, mixed-income environments primed for walkability.

## 3. Improve affordability

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Prioritize investment in new affordable housing and increase overall housing supply given the outsized market demand for walkable urbanism.

Preserve existing affordability for homes and businesses.

## 2. Foster non-auto travel

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Invest in public transportation.

Improve the design of streets and the public realm to create a safe, attractive environment for pedestrians, people with mobility impairments, cyclists and other individuals outside of cars.

## 4. Plan for future climate impacts

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Develop in places that are most prepared for current and future climate hazards.

Update building and planning standards to recognize likely future conditions.



# CONTACT

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