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Part 1: Executive Summary

Cedar Park is a neighborhood located in West Philadelphia that is at risk of gentrification due to its proximity to University City. Our report focuses on demographic, socio-economic, and housing changes to evaluate the extent of change between 2011 and 2021. We chose these three categories to build a more holistic understanding of change over time. Understanding change and potential change is crucial for the municipal government to anticipate future growth or decline trends in an area.

Our comprehensive analysis has shown that Cedar Park has undergone significant changes between 2011 and 2021. The demographic composition has shifted considerably. During this period, Cedar Park underwent a 56 percent decline in its Black population, while the Asian community experienced a 39 percent growth. Moreover, the neighborhood's population is aging. Notably, the population aged 34 to 75 increased significantly, particularly in the 34 to 44 age group, which surged by roughly 50 percent. Meanwhile, a 36 percent decrease in the younger population suggests a slight aging-in-place phenomenon.

The socio-economic analysis reveals an increase in the middle-class population and a growing wealth gap in Cedar Park. Low-income households decreased by 11.3 percent, while high-income households increased by 21.3 percent. The changes in household income composition underscore profound economic shifts within this neighborhood. Increased levels of higher education attainment and shifting demographics reflect changes observed in the income distribution of residents in the neighborhood.

Housing changes in Cedar Park are a crucial aspect of the neighborhood's transformation. The trends suggest that Cedar Park is a desirable place for homeowners. Homeowner vacancy rates dropped from 5.3 to 0 percent, while high-valued homes valued over \$200,000 increased by 405 percent. Moreover, the share of renters paying more than \$1,500 monthly increased from 8.7 percent to 64 percent between 2011 and 2021. Although the housing cost burden is not serious in Cedar Park, examining how increased living costs can exacerbate social inequalities is vital.

The critical challenge Cedar Park faces is that its Black population declined rapidly from 2011 to 2021 in this historically Black-dominant neighborhood, and projections for 2030 even indicate a further decline. The primary driver appears to be escalating housing costs, leading to gentrification. Investing in affordable housing projects and incorporating public art that celebrates Cedar Park's rich Black history can help mitigate the impact of gentrification, maintaining the neighborhood's cultural integrity. Additionally, there are other methods for the neighborhood to recover its resilience and stimulate the economy, like protecting POC-owned small businesses from rent increases by offering financial aid and affordable housing.

Part 2: Neighborhood Analysis

1: Introduction

Cedar Park is a neighborhood located in West Philadelphia. Spruce Street, South 46th Street, Baltimore Avenue, and South 50th Street loosely bind the neighborhood (Figure 1). For this study, Cedar Park demographics are quantified using Census Tract 79. Although this tract does not cover all areas considered Cedar Park, it is the closest representation of the neighborhood.

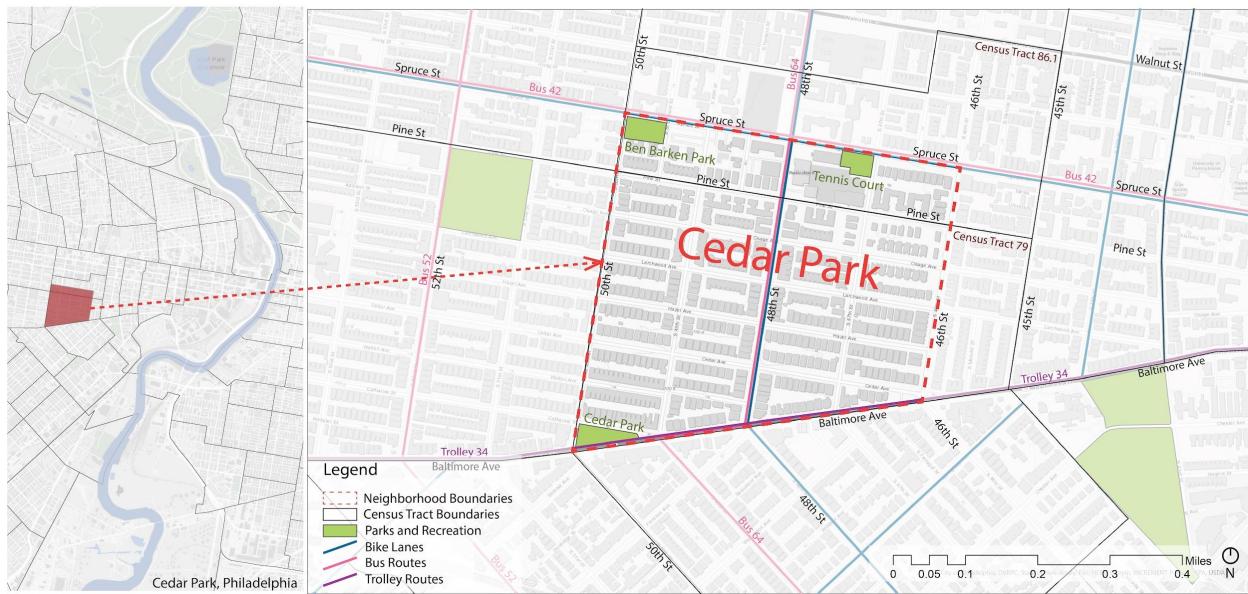


Figure 1: Cedar Park urban context (Ji)

Cedar Park consists mainly of residential dwellings, with some commercial and communal uses, and is celebrated for its suburban atmosphere, accessibility and diversity. This diversity is demonstrated in Baltimore Avenue, which is home to local shops and restaurants from many different cultures, such as All African Grocery Inc., Mariposa Coop, Queen of Sheba Restaurant, Aksum (Ethiopian Restaurant), Medmer (African bar and restaurant) and many other locally owned businesses and Dahlak (Eritrean-Ethiopian Restaurant) and Vietnam Cafe. This gives the neighborhood a distinct blend of cultures, making it unique.

The prominent housing typology of the area is Queen Anne semi-detached houses, which are typically two- to three-story high (Cedar Park Neighbors). According to the 5-year American Community Survey (ACS), this small residential neighborhood is home to 4,321 residents in 2021. As prospective urban planners, our team wanted to understand the changes occurring within a neighborhood adjacent to the University City area. This report examines the demographic, socio-economic, and housing changes that have occurred in Cedar Park since 2011. We believe that using data can help us plan and prepare for changes that a neighborhood will face in the near future. Using existing information, we want to forecast the trends for Cedar Park in 2030.



Figure 2: Cedar Park street view (Ji)

We believe Cedar Park is going through various changes, such as gentrification. We hypothesize that as the University of Pennsylvania and surrounding higher-education institutions expand, increased housing pressure will be placed on adjacent communities, such as Cedar Park. We define gentrification as the displacement of socially marginalized and economically vulnerable populations by higher-income and highly educated populations. Cedar Park's attractive location will drive up demand for land and housing, resulting in higher-income residents moving into the neighborhood. This would inadvertently displace lower-income residents in a neighborhood that was largely Black and colored before 2010 (Blumgart). To investigate whether gentrification occurs in Cedar Park, we aim to measure it through proxies such as housing costs, home values, median income, education attainment, and more.

2: Demographics

2.1: Current Conditions: a White, Young, Dominant Neighborhood

Cedar Park has limited racial and ethnic diversity. According to the 2021 Census Bureau ACS, 3,740 one-race people and 600 people with two or more races live in the area. Overall, Cedar Park had 880 Black or African American residents, 370 Asian residents, 2,280 White residents, 50 Native Hawaiians and Other Pacific Islanders, and 160 residents of other races. It is a lively neighborhood with relatively young residents. The median age of Cedar Park is 35.1, with notable young and middle age groups. As of 2021, the age group 25-34 takes up the biggest share, with 1190 people, which takes up to 30 percent of its total population. Then is the age group of 35 to 44 and 45 to 54, which have around 700 people and take up to 16 percent.

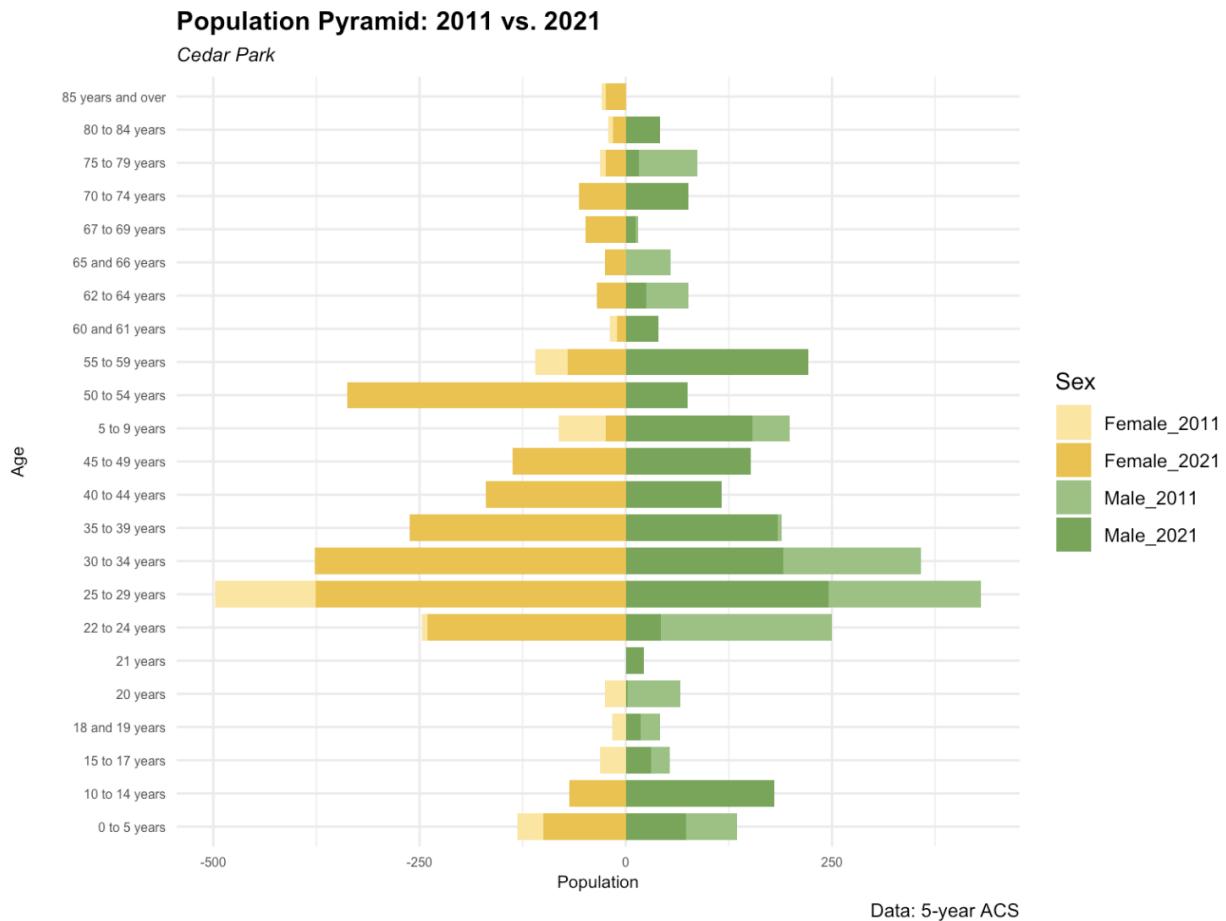


Figure 3: Cedar Park population of age groups from 2011 to 2021

2.2: Changes over time: Decreasing Black, Increasing White

From 2011 to 2021, the Cedar Park neighborhood experienced a decline in population and specific groups of people, including Black residents and the young population. The displacement of residents led by gentrification can be notably seen. Cedar Park's population declined 10 percent, from 4,780 in 2011 to 4,320 in 2021. The Black population declined significantly by 56 percent, from 1,980 in 2011 to 880 in 2021. Though the Asian population has a 32 percent increase, from 280 to 370, and the population of Native Hawaiians and Other Pacific Islanders grew from 0 to 50, the dramatic decline of the Black population and increase of the White population is still drawing our attention to evaluate its gentrifying condition.

As for the age groups, the decline in population aged 15 to 24 is notable, from 740 to 360, which is a decrease of 52 percent. Moreover, both populations aged under 5 and 5 to 9 have declined by around 35 percent from 2011 to 2021. That could suggest a potential decrease for the next generation of young people. The change in median age from 30.4 to 35.1 could also suggest a slight aging in the Cedar Park neighborhood.

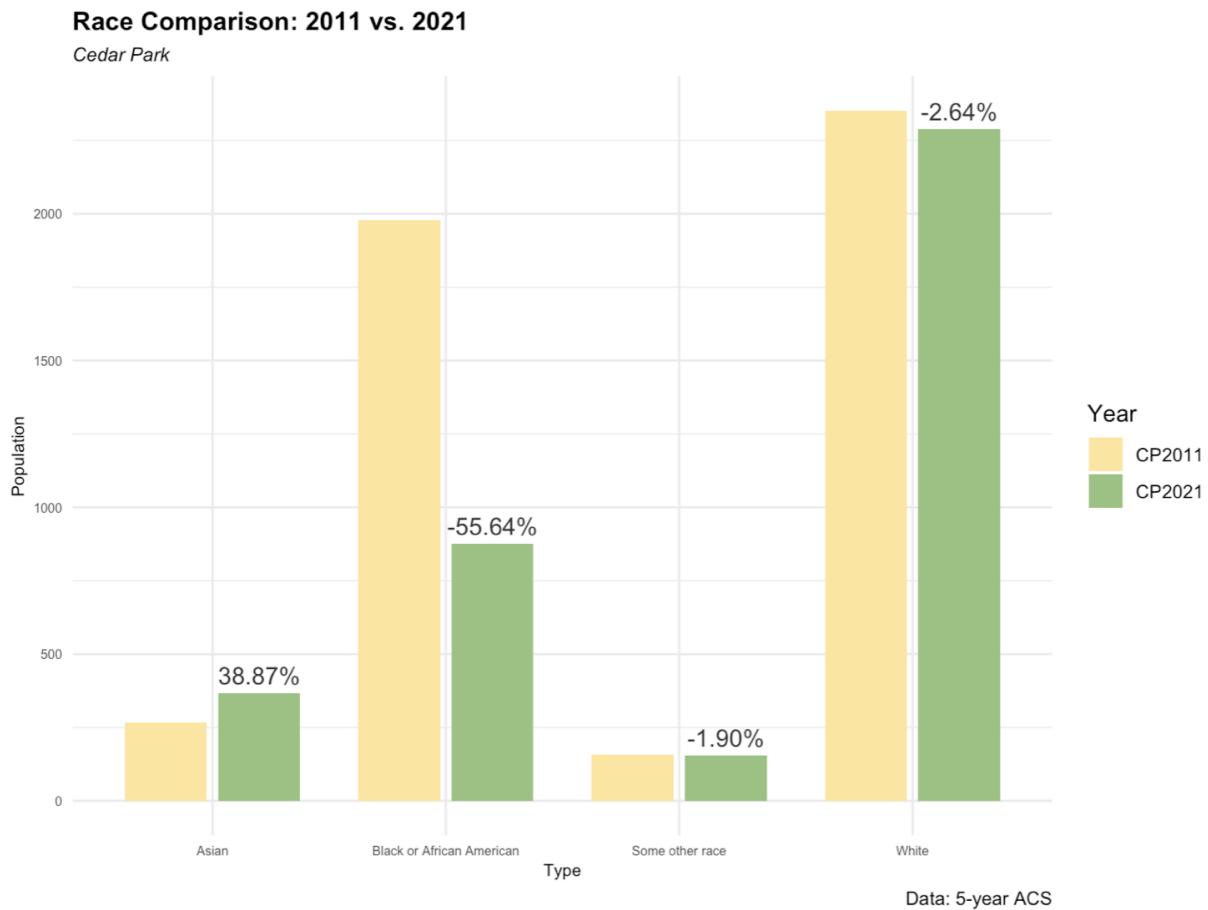


Figure 4: Cedar Park racial compositions from 2011 to 2021

2.3: In Comparison with Philadelphia: More White, More Aging

By comparing it with Philadelphia County, Cedar Park is a shrinking neighborhood with declining diversity. Overall, the population of Philadelphia County has experienced a slight increase of 5 percent, while Cedar Park decreased by 10 percent. The change toward less diversity in this neighborhood is dramatic compared to the Philadelphia context. From 2011 to 2021, Philadelphia's Black and White populations experienced a slight decline of around 5 percent. In contrast, Cedar Park has a more dominant White population and a smaller Black population. Though Philadelphia also has an increase in Asian population, the compositional change of it is higher in Cedar Park. However, it does not overshadow the fact that Cedar Park is less diverse due to gentrification. More evidence will be discussed in later sections.

As for age groups, Philadelphia County has a stable median age of 34. With a change in median age from 30 to 35, Cedar Park has a more significant aging trend than the whole county. A decline of 20 percent in the age group of 15 to 24 can also be seen in the county context from

2011 to 2021, which is much smaller than the neighborhood's change (52 percent). Contrary to Cedar Park, the county has increased in population under 5 and 5 to 9. The gender shares of both Cedar Park and Philadelphia County are equal and stable, which is almost half split.

Compared with Philadelphia County, the decreasing diversity in racial composition is more straightforward. Although notable, the loss of the young population might not be very concerning based on the similar trend in the county and the fact that the young and middle-aged population is still the dominant group in Cedar Park.

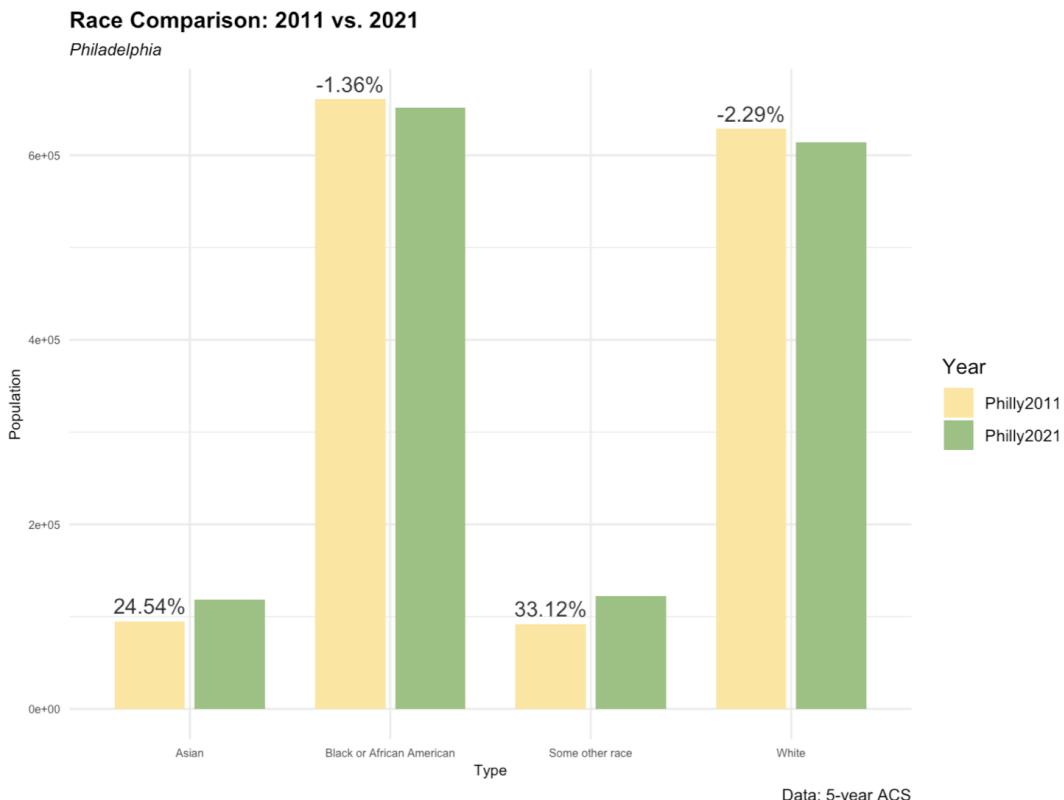


Figure 5: Philadelphia County racial composition from 2011 to 2021

3: Socio-economic

Investigations into the economic sector unveil dynamic shifts in employment areas. Cedar Park experienced an evident shift in job sectors during the decades. Notable shifts include a decline in manufacturing jobs, a growth in the hospitality industry (53 percent increase in Accommodation and Food services), and the emergence of the information sector (increased from 10 to 15 jobs). Besides, the University of Pennsylvania's westward movement has profoundly impacted this neighborhood's population composition and employment industries, prompting critical reflections on income change, age structure shift, and racial composition.

3.1: Household Income: A Growing Middle- to Upper-middle Class

In Cedar Park, the most significant household income composition changes were an increase in households earning \$100,000 to \$149,999 by 78 percent, \$150,000 to \$199,999, and \$200,000 or more by 405 percent. Furthermore, overall median and mean household incomes increased by 75 percent and 93 percent, respectively. The neighborhood's economic composition differs from the rest of Philadelphia as the median household income is much greater in Cedar Park at \$72,847 (with adjustment of inflation) than in Philadelphia County at \$52,649 (with adjustment of inflation). This suggests that there could be a growing middle to upper-middle class in the neighborhood.

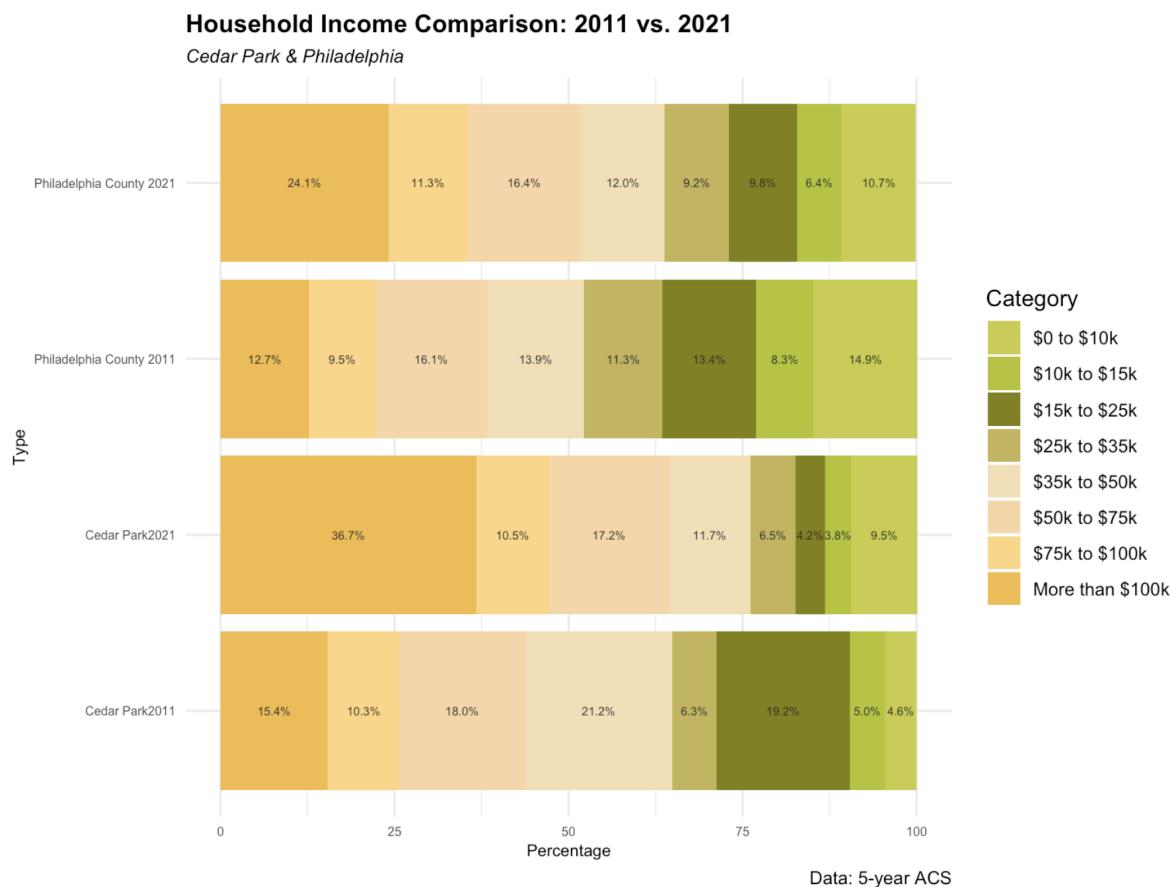


Figure 6: household income comparison between 2011 and 2021

Cedar Park's residents generally have a higher educational attainment than Philadelphia's. Between 2011 and 2020, Cedar Park's graduate or professional degree attainment and bachelor degree attainment witnessed slight increases. The proportion of professional degree attainment in Cedar Park rose 11 percent, and bachelor's degree attainment rose 34 percent. Compared to Philadelphia, Cedar Park has a much higher percentage of residents with bachelor's and graduate/professional degrees. Although Cedar Park has a much higher educational attainment percentage among residents, Cedar Park and Philadelphia County experienced similar

percentage growth. This demonstrates that higher education attainment trends are also occurring in other neighborhoods across Philadelphia. Scholars in the urban planning field have often attributed educational attainment as a signifier of gentrification. (Freeman and Braconi 2004; Freeman 2005), research suggests a replacement effect, where those with more education replace those with less attainment.

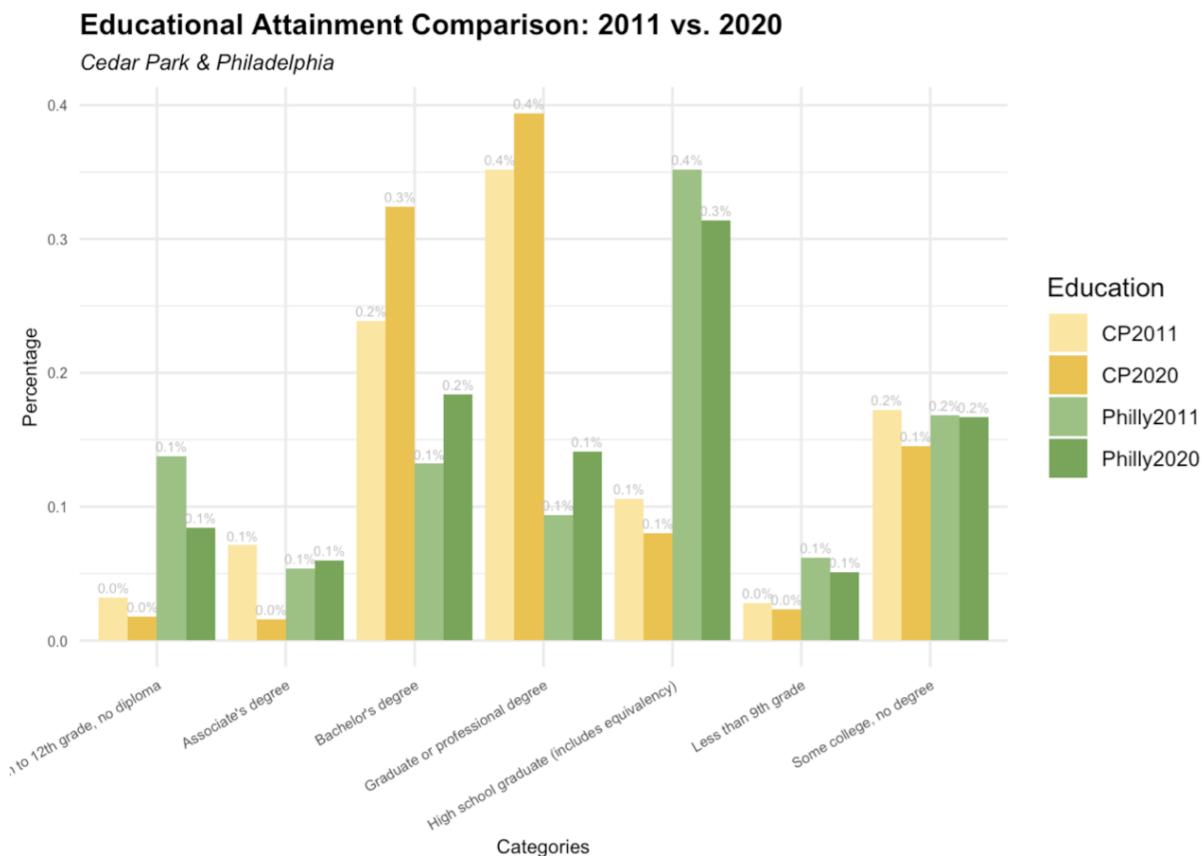


Figure 7: Educational attainment comparison between 2011 and 2021

3.2: Changes Over Time: A Flourishing Hospitality Industry

The employment data from 2011 to 2020 for Cedar Park indicates an overall growth in total employment, increasing from 145 employed in Cedar Park in 2011 to 175 in 2020. Noteworthy shifts occurred in specific industries, with the information sector witnessing substantial growth. Conversely, manufacturing employment declined, possibly due to broader economic shifts. Accommodation and Food services displayed notable growth, suggesting a flourishing hospitality industry. Employment in technical services decreased, while real estate employment, absent in 2011, increased to 5 workers by 2020. Philadelphia serves as our reference economy, allowing us to assess Cedar Park's economic trends.

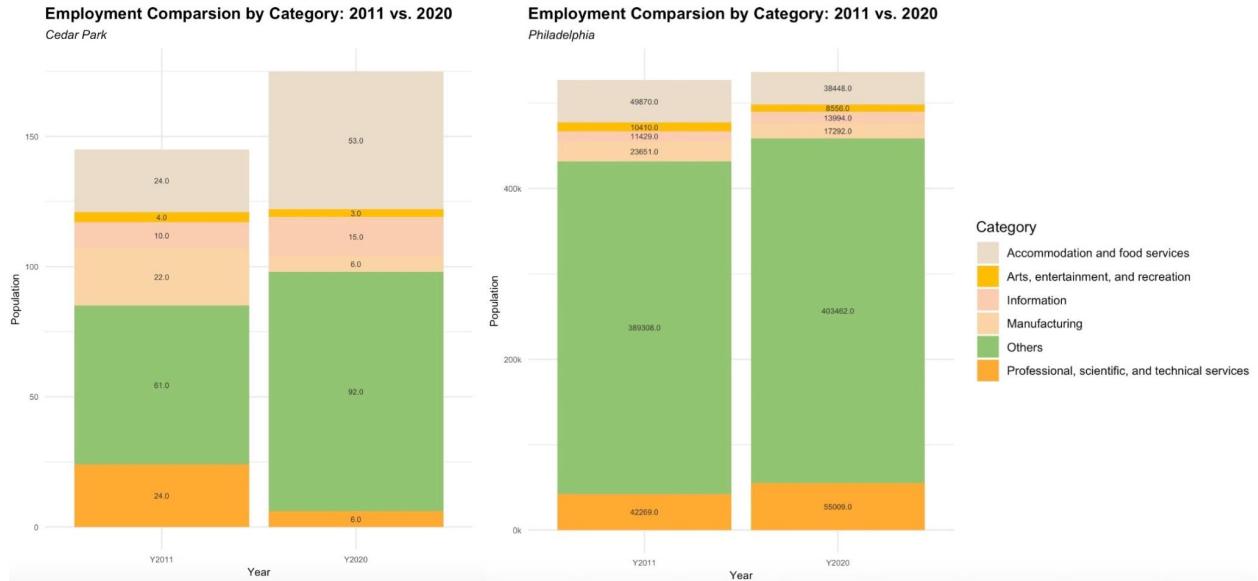


Figure 8: Job Sector Composition

Location Quotient (LQ) analysis revealed changes in the neighborhood's basic industries, especially manufacturing. The employment multiplier for Cedar Park in 2011 was 1.59, suggesting each job in basic industries created 1.59 additional jobs. In 2020, the multiplier slightly increased to 1.73, indicating a diverse economy. In contrast, Philadelphia County's higher multiplier suggests a greater dependence on basic industries. In our neighborhood of Cedar Park, the LQ is greater than 1 in 7 employment industries when comparing Philadelphia County to the US. We set the location quotient standard at 1.5 to help us distinguish basic industries from local serving industries. The data tells us that industry sectors such as information, accommodation and food services, and science are not only basic industries in Philadelphia but are also factors that promote local economic growth in Cedar Park. One of the biggest changes in Cedar Park's basic industries is in the manufacturing industry sector. LQ tells us that the manufacturing industry had an LQ of 3.38 in 2011. However, this figure dropped to approximately 1 in 2020, demonstrating that manufacturing is no longer a basic industry in Cedar Park.

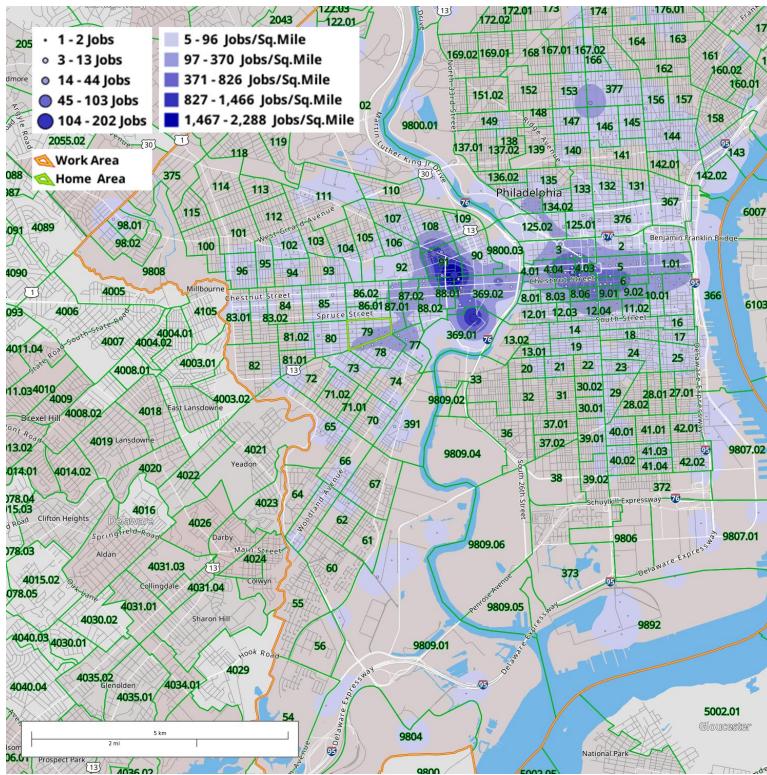


Figure 9: working destinations of Cedar Park residents in 2011 (OnTheMap)

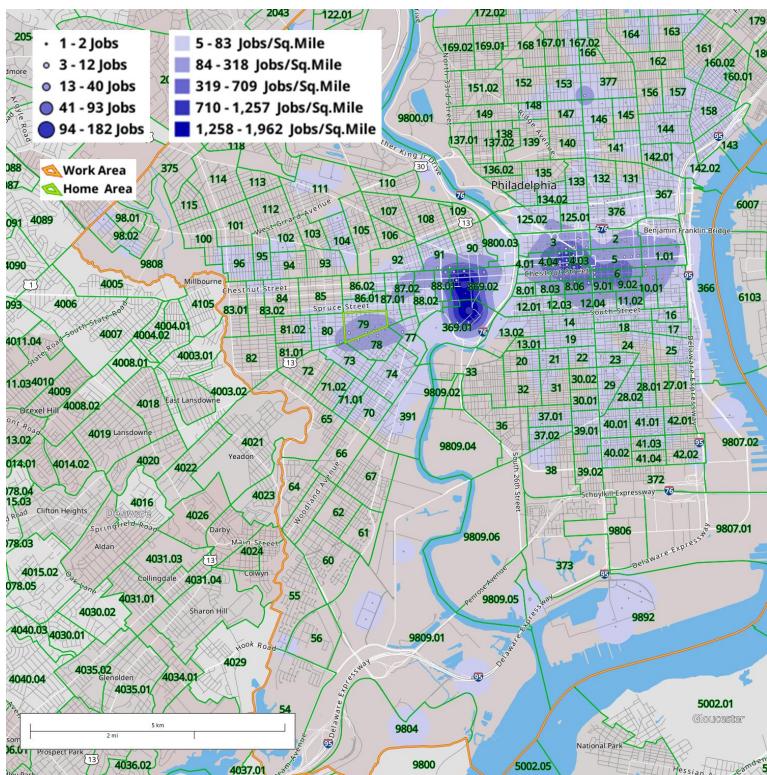


Figure 10: working destinations of Cedar Park residents in 2021 (OnTheMap)

These maps display the areas where people from Cedar Park work. It demonstrates that a majority of Cedar Park's residents work in University City, with a significant number of residents also working in Center City. When comparing Cedar Park's residents' workplaces from 2011 to 2021, the concentration of employment in University City and Center City was the highest for both periods. However, we see that the concentration of employment around University City, by the University of Pennsylvania's boundaries, is denser in 2021 compared to 2011, suggesting that more Cedar Park residents work in that area in 2021. This finding affirms our hypothesis that more higher-education-affiliated workers have moved into Cedar Park over time.

4: Housing

4.1: Housing Patterns: A Desirable Neighborhood to Own In

Housing patterns can signify the trajectory of a growing or declining neighborhood. Housing vacancy, homeownership rates, and rental prices are potential indicators of the state of a neighborhood. Typically, we would expect low vacancy, high homeownership rates, and high rental prices in more affluent neighborhoods. We would expect the inverse trends for a declining area. For this study, we looked at 5-year ACS data for 2011 and 2021 to identify housing changes and patterns occurring within the neighborhood.

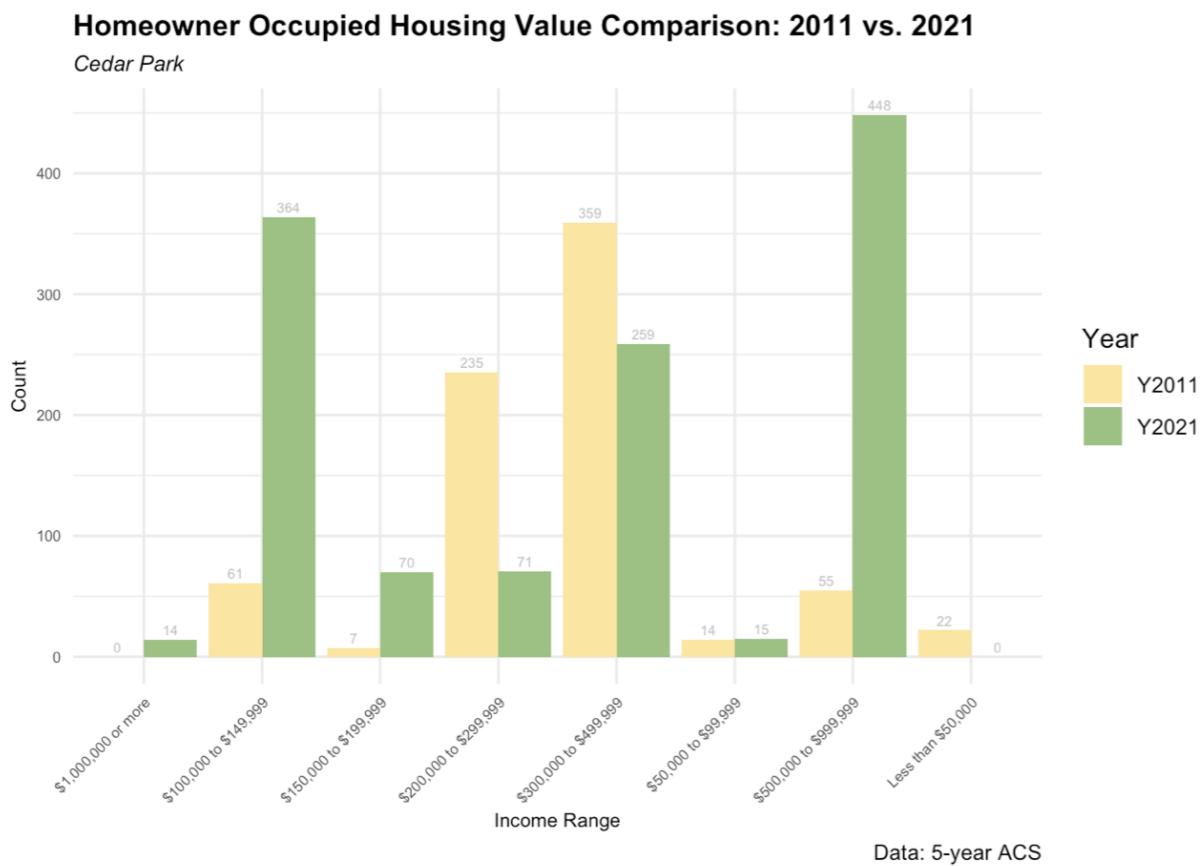


Figure 11: Homeowner-Occupied Housing Values in Cedar Park

Between 2011 and 2021, the population in Cedar Park dropped from 4,779 to 4,321. While the overall population declined, the number of households increased from 2,097 to 2,204. Despite its declining population, Cedar Park seems like a desirable neighborhood for homeowners. The homeowner vacancy rate dropped from 5.3 percent to 0 percent within ten years. Moreover, homeowner-occupied housing increased significantly by over 25 percent. The cost composition of such housing has also changed drastically during this period (Figure 11).

From 2011 to 2021, the number of homes valued below \$300,000 dropped by 34.5 percent, homes valued at \$300,000 or more increased by 74.2 percent, while homes valued at \$200,000 or more to buy increased by 405 percent. The median housing price increased by over \$150,000 within a decade. There was also a large growth of homes valued between \$100,000 and \$149,999 in 2021. This suggests that while overall housing became less affordable within Cedar Park, the neighborhood still has diverse home values. However, it is important to note that homes valued below \$100,000 and between \$200,000 and \$299,999 are disappearing from the area. A potential reason for the increasing price gaps between home values in the neighborhood could be the school district catchment areas. Cedar Park falls within four different catchment areas (School District of Philadelphia). Homeowner preferences for school enrollment could influence home prices, driving up home values only along specific blocks within a catchment area.

4.2: Housing and Rent Burden: An “Affordable” Neighborhood

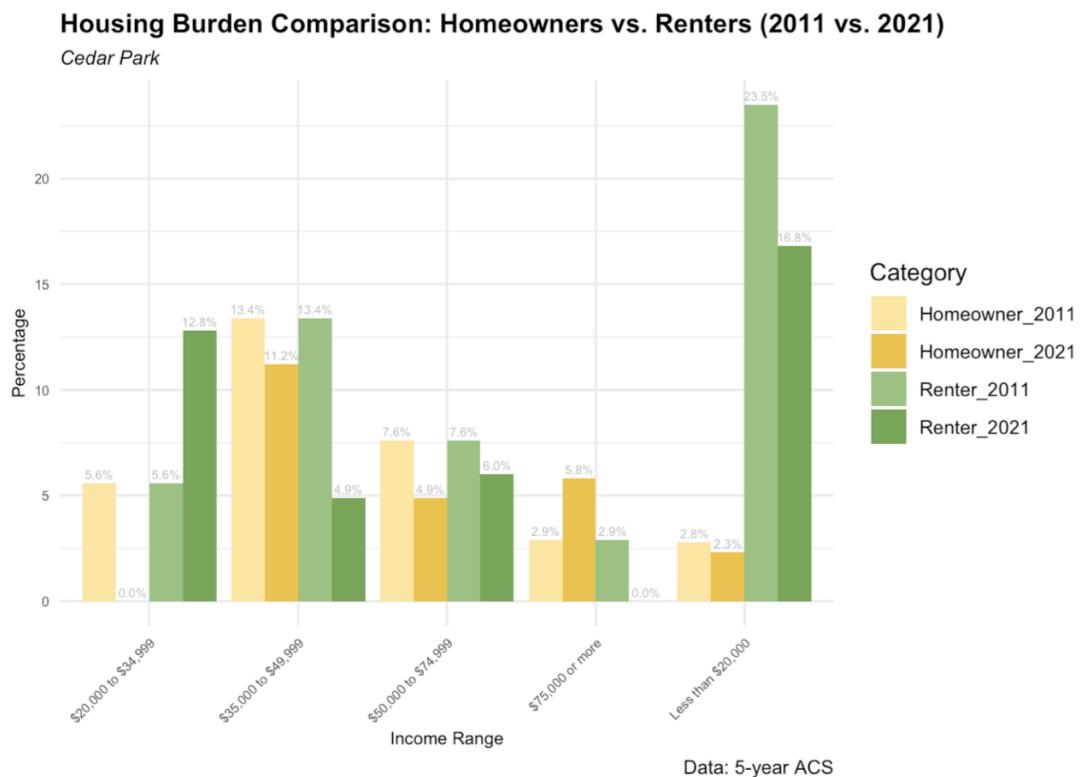


Figure 12: Cedar Park Housing Burden by Homeowner and Renter

Increased housing burden is a concern for increasingly expensive areas. Housing or rent burden is defined by the proportion of income a household spends on monthly household costs. We categorize a household as housing- or rent-burdened if they spend 30 percent or more of their household income on monthly household costs. Figure 12 shows the percentage of households that experienced housing cost burdens in 2011 and 2021. Lower-income households earning under \$34,999 have more residents who experienced housing burdens than their homeowner counterparts. For instance, 16.8 percent of renter households earning under \$20,000 were rent-burdened, while only 2.3 percent of their homeowner counterparts were cost-burdened.

We also looked at changes in the housing burden for homeowners and rents in Cedar Park between 2011 and 2021 (Figure 13). Overall, the housing burden decreased in Cedar Park for homeowners and renters. Only renters in the \$20,000 to \$34,999 group and homeowners in the \$75,000 or more income group saw a 7.2 percentage point and 2.9 percentage point increase in housing burden, respectively.

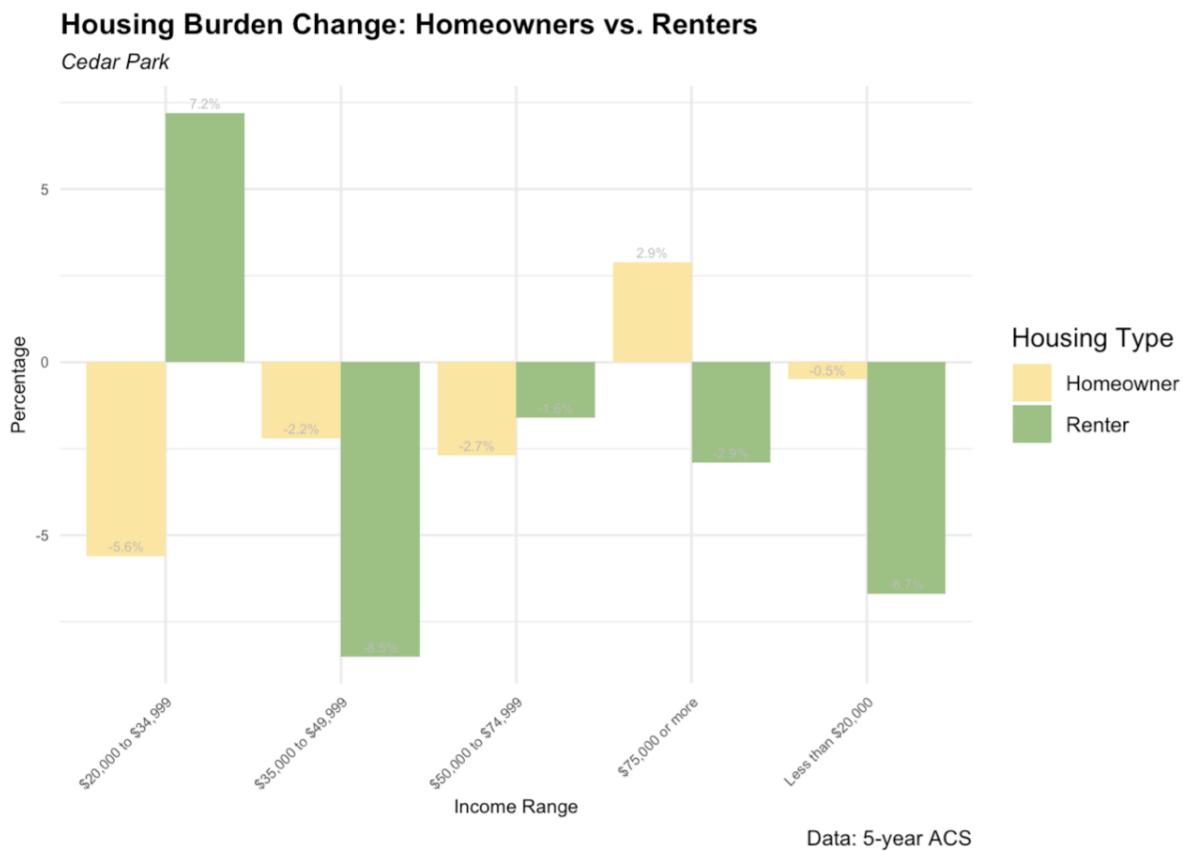


Figure 13: Housing Burden in Cedar Park

Our team expected an increase in the housing burden in Cedar Park as the median housing prices jumped by 47 percent between 2011 and 2021. Moreover, in 2021, the median homeowner-occupied house cost over \$300,000 more than the median price observed in

Philadelphia. However, our hypothesis was incorrect. While the median housing price increased by 47 percent, it is important to note that the median household income increased by 75 percent to over \$70,000. This indicates that while housing costs have increased in Cedar Park, residents are now earning more, resulting in an overall decline in the proportion of residents facing housing burden.

4.3: In Comparison to Philadelphia

We compared the home value changes in Cedar Park to Philadelphia to understand if trends within the neighborhood are consistent with the city. Figure 14 shows the percentage change in homeowner-occupied home value. We observe that the changes in Cedar Park are very different from those in Philadelphia. Firstly, the most obvious change for Cedar Park is in homes valued between \$500,000 and \$999,999, which increased by over 700 percent in 10 years. In comparison, Philadelphia saw an overall increase of 138.1 percent in this category. Moreover, homes valued over \$1,000,000 grew from 0 to 14 homes between 2011 and 2021 for Cedar Park, which was not captured in Figure 14. We can deduce from the quick growth in home values that the desirability to own in Cedar Park has increased greatly. The pace at which high-valued homes are growing within the neighborhood suggests that more high-income residents are moving into the neighborhood. If this trend continues in Cedar Park, fewer moderate- and low-priced homes will be available, pushing out middle- and lower-income residents.

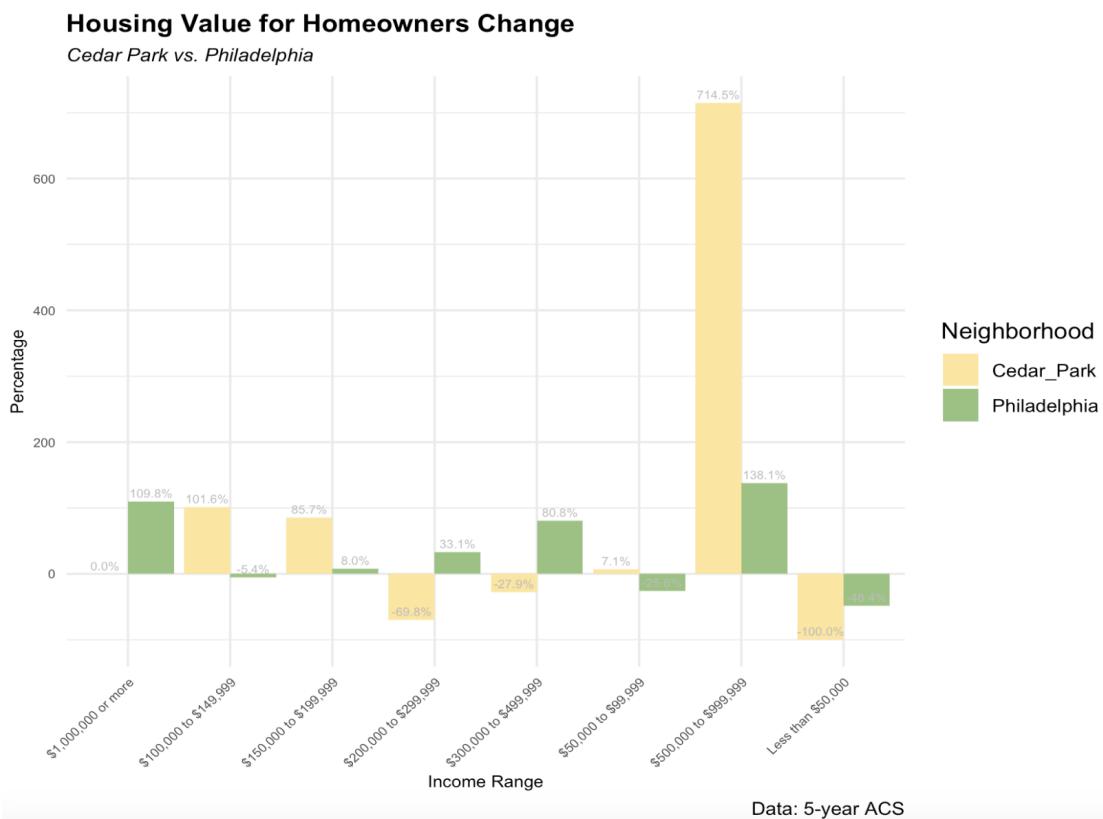


Figure 14: 2011 to 2021 Change in Homeowner-Occupied Housing

It is important to understand how the changes occurring within Cedar Park compare to the rest of Philadelphia. Figure 15 shows the 2021 housing burden for homeowners and renters in Cedar Park and Philadelphia. Cedar Park homeowners earning below \$34,999 were significantly less cost-burdened than their Philadelphia counterparts. However, a greater percentage of homeowners in Cedar Park earning above \$35,000 were cost-burdened than Philadelphian homeowners earning above \$35,000. Overall, the rent burden experienced in Cedar Park was not significantly different from that observed in Philadelphia. This suggests that existing Cedar Park residents can afford their living arrangements. However, our data fails to explain if residents who experience housing cost burdens end up moving out of the neighborhood as they are financially priced out. While housing burden data can provide some insight into the overall housing environment, it is critical to consider other factors that may be driving housing changes.

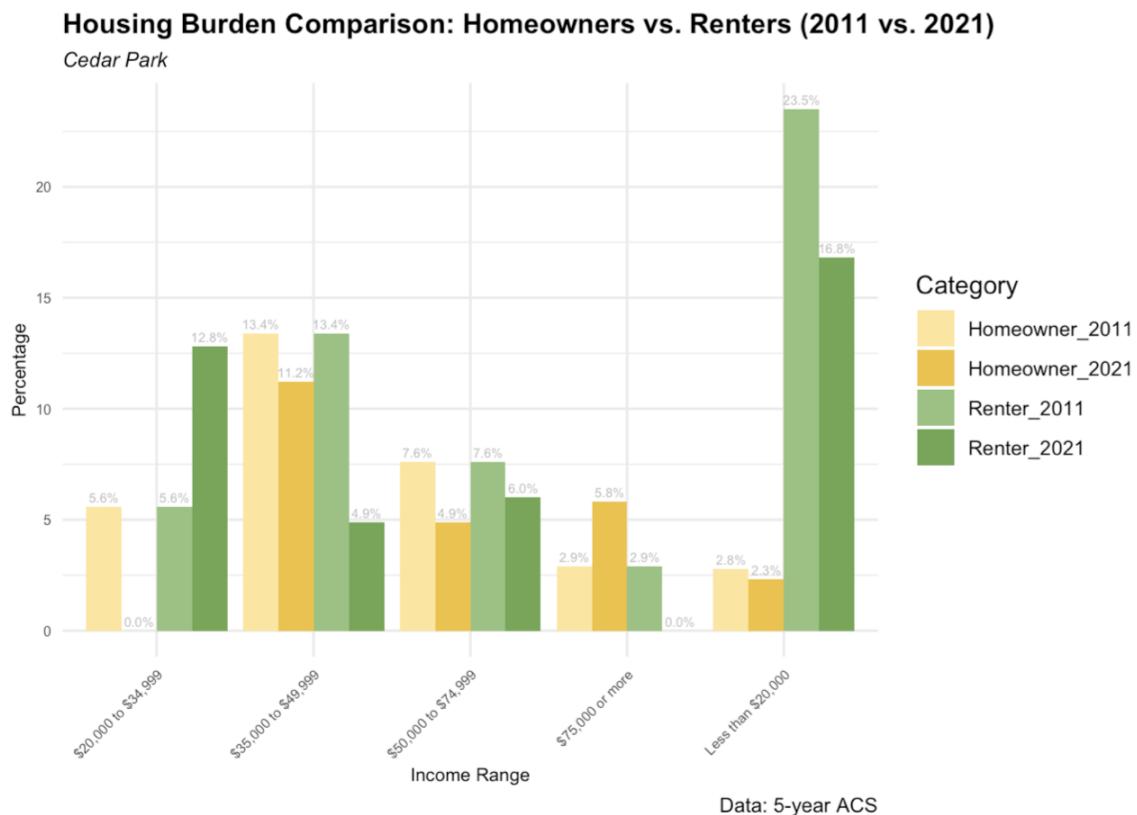


Figure 15: Housing Burden for Renters and Homeowners in 2021

Part 3: Issues, Challenges & Opportunities

Affordable housing, local businesses, Black history reflections.

Cedar Park is a historically Black-dominant neighborhood. However, through decades of development and gentrification, the racial composition has primarily changed and is highly imbalanced. It is concerning that the Black population declined by 56 percent in just ten years

from 2011 to 2021, compared to the larger picture—Philadelphia County—which has a slight decline of 5 percent, the same as the White population. We made projections based on current and historical data. In 2030, the Cedar Park neighborhood is expected to see a population of 4,000, projected using the simple trend method with data from 2000 through 2021. Our projection shows that the White population may increase to 2,300, which takes up to 60 percent of the total population. The model predicts that the Black population will decline to 0, which is a share of zero percentage. In 2030, the Asian population will increase to around 500, taking up to 13 percent. It is concerning to see the black population decrease in Cedar Park. Although it is difficult to understand what external factors are driving this change, this racial demographic change could result from increased housing prices in the area from 2011 to 2021. The future trajectory of the black population differs from the black population in Philadelphia County since Cedar Park's racial demographic change in the last ten years is not reflective of the general trend in Philadelphia County.

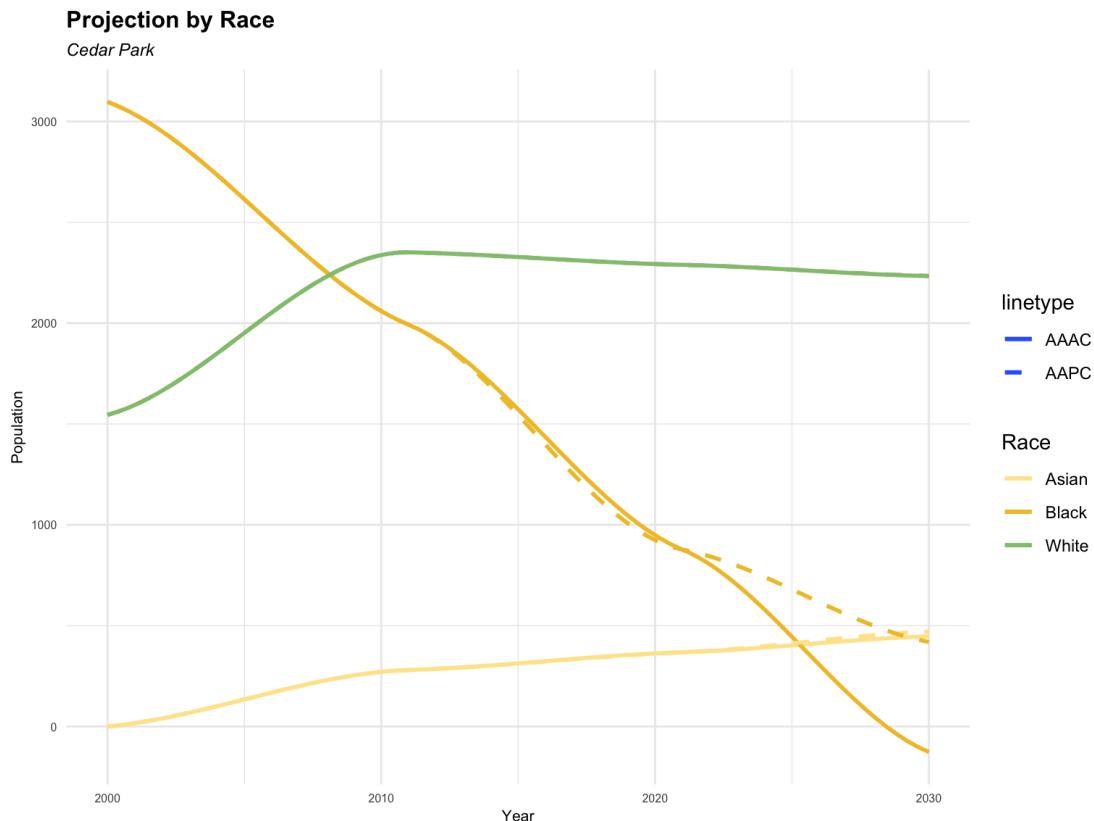


Figure 16: racial projection for 2030 Cedar Park

One of the reasons for this situation is the increasing housing costs. According to our previous discussion, homes valued between \$500,000 and \$999,999 increased seven times in Philadelphia County over the ten years. This kind of situation should continue towards 2030 for the increasing income of Cedar Park residents and the good schools in the catchment area. It will lead to heavier gentrification.

Preserving Cedar Park's Cultural Identity

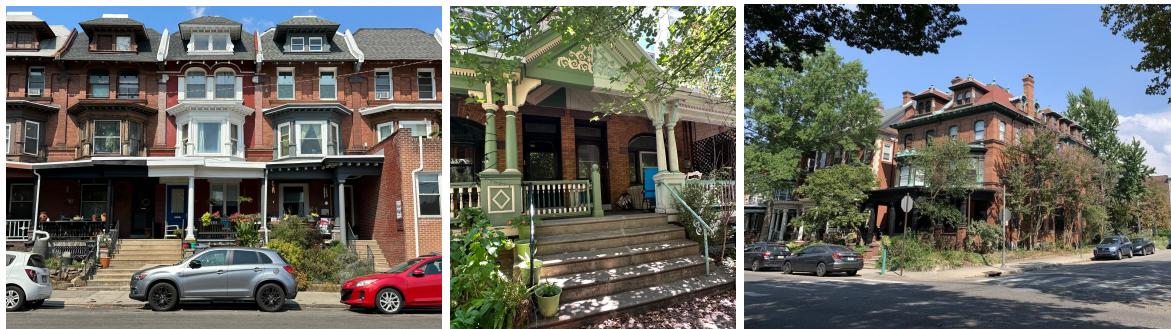


Figure 17: Cedar Park Housing Typology (Attar)

There are opportunities in Cedar Park's real estate market to cope with the demographic issues. With the typical lifespan of residential houses ranging between 50 to 70 years, a substantial majority, nearly 80 percent of the houses, were constructed in 1951 or earlier, much higher than the percentage of Philadelphia County. This suggests that most of Cedar Park's housing might require renovations, particularly structural maintenance. Many houses are historically precious, such as Victorian style and Colonial-revival style. This architectural characteristic contributes to the neighborhood's character and heritage. Balancing the preservation of its historic buildings with the need for modernization and development will be an essential topic for the community to explore in the coming years. But considering the gentrifying situation, more affordable housing projects should be invested to attract low-income populations; public art that tells the rich Black history of Cedar Park should also be introduced in the new development process.

Accommodation and food services displayed notable growth in Cedar Park from 2011 to 2022, suggesting a flourishing hospitality industry. This flourishing hospitality can be seen in restaurants and food services in Cedar Park. Despite black population decline in Cedar Park, the stretch of Baltimore Avenue which is part of Cedar Park, has been known for Black American-owned businesses. Dahlak was the first Ethiopian restaurant to open in Philadelphia (Hagen, Carrie). Following Dahlek, other Eri-Ethiopian restaurants began popping up along the same stretch. The 1990s brought the Queen of Sheba and Gojjo. 2021 saw the addition of Buna Cafe and Aksum (Hagen, Carrie). Other businesses, such as the Gold Standard Cafe and Amari's, which opened in 2015, identify as black-owned businesses. From 2011 to 2021, Cedar Park saw more Black/African American-owned businesses opening restaurants on Baltimore Avenue, such as Amari's, Aksum, Bunna Cafe, and Hibiscus Cafe, opening between 2011 and 2021 in Cedar Park. These businesses could also be growth factors in the food and accommodation sector. Since the total employment in our neighborhood is only 175 employees, it is possible that these new restaurants were a factor in the growth of the Accommodation and Food Services in our neighborhood. These culturally diverse businesses are essential to the neighborhood's character. They should be protected by providing aid if rent prices continue to increase to protect them from being replaced by bigger chains and businesses.

Part 4: Conclusion

The change in housing value, racial composition, income, and educational attainments suggest that the neighborhood is going through gentrification. Cedar Park had the socioeconomic status of their residents' educational attainment higher and growing faster than the city-wide median and the home values (median home value and median gross rent value) are growing faster than the city-wide median over the decade period. These factors could also be reasons for the socio-economic composition change and the loss of black residents in Cedar Park.

Considering multi-faceted data on demographics, socio-economics, and housing, this report provides profound insights into the current situation and makes assumptions about potential future trends of Cedar Park. The data supports the transformative changes of the past decade while offering strategic recommendations for ensuring the neighborhood's sustainable and comprehensive development in the future.

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