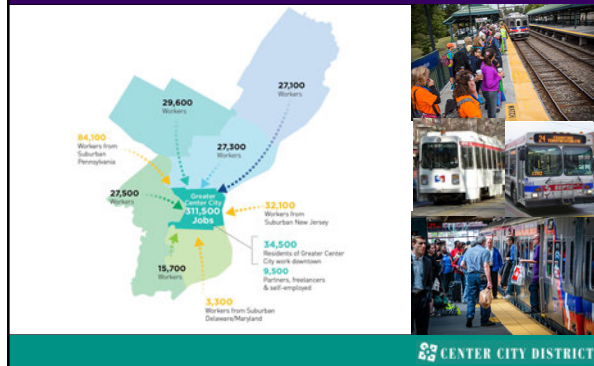


It connects residents to opportunity



#3: Restore confidence in public spaces



#4: Restore confidence in workplace



Plexiglass dividers & upgraded HVAC



Setting the context: CCD created in 1991 Municipal Authority with private sector board 1600 properties



1992: Diversifying downtown land-use Investments: arts & entertainment



Convention Center opened in 1994



CENTER CITY DISTRICT

Substantial investment in tourism attractions
1995-2005



CENTER CITY DISTRICT

Prompted private investment in new hotels:
reused vacant buildings



CENTER CITY DISTRICT

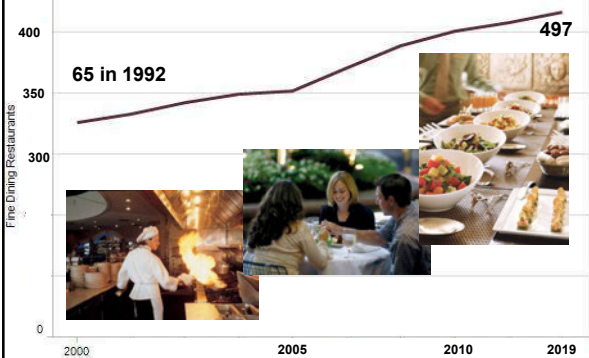
Strong growth in retail



Retail

CENTER CITY DISTRICT

Continuous growth in fine dining restaurants



CENTER CITY DISTRICT

497 full-service restaurants & eating establishments



CENTER CITY DISTRICT

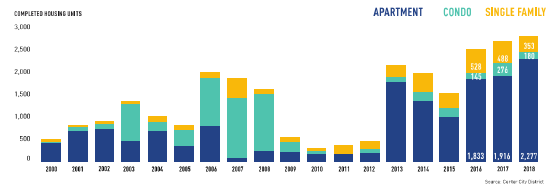
Private investment in town-houses, apartments & condos



CENTER CITY DISTRICT

Since 2000: 30,000 new housing units Greater Center City population up 25% to 195,000;

FIGURE 2: GREATER CENTER CITY HOUSING COMPLETIONS, 2000-2018



Source: Center City District

CENTER CITY DISTRICT

Diversifying downtown land-use for 30 years



CENTER CITY DISTRICT

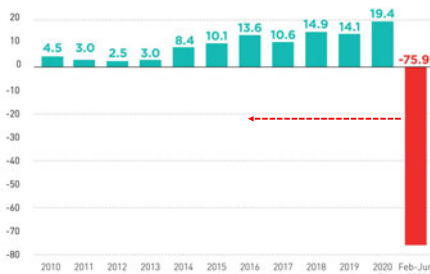
When the pandemic came, city shut down on March 16, 2020



CENTER CITY DISTRICT

After 11 years growth: Pandemic + Stay at Home order Erased five years of citywide employment gains

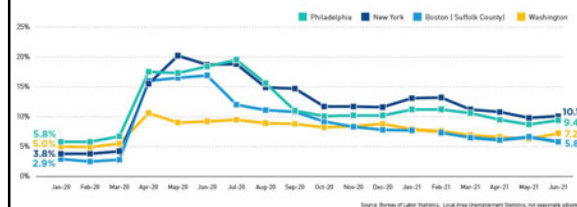
CITY OF PHILADELPHIA EMPLOYMENT CHANGE, 2010-2020 (THOUSANDS)



CENTER CITY DISTRICT

Unemployment spiked from 5.8% to 18%; Now back to 9.4%

UNEMPLOYMENT RATE, NORTHEAST CITIES

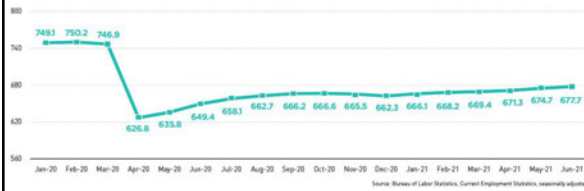


Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, last seasonally adjusted

CENTER CITY DISTRICT

Ultimately lost 120,000 Regained 51,000 jobs from April 2020 to June 2021

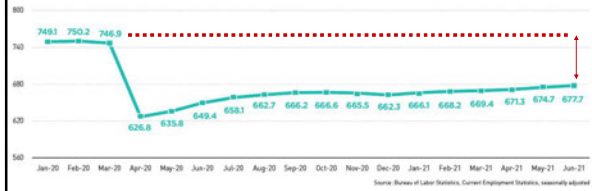
PHILADELPHIA CITY PAYROLL EMPLOYMENT BY MONTH (IN THOUSANDS)



CENTER CITY DISTRICT

Still 69,200 jobs below February 2020

PHILADELPHIA CITY PAYROLL EMPLOYMENT BY MONTH (IN THOUSANDS)



CENTER CITY DISTRICT

Biggest losses: Leisure & hospitality down 31% Education down 24%; Health Care -4% Office sector -5.9%

PHILADELPHIA CITY EMPLOYMENT TRENDS BY INDUSTRY (IN THOUSANDS)

	PAYROLL EMPLOYMENT					EMPLOYMENT CHANGES				
	FEB 2020	MAY 2020	MAY 2021	JUNE 2021	2021	FEB - MAY 2020	FEB 20 - JUN 2021	MAY 2020 - JUN 2021	MAY 2021 - JUN 2021	
TOTAL JOBS	750.2	635.8	676.7	677.7	2021	(114.4)	(72.5)	41.9	1.0	3.0
Mining, Logging and Construction	11.4	9.9	11.6	10.9		(1.5)	(0.5)	1.0	(0.7)	
Manufacturing	18.9	15.8	16.9	17.0		(3.1)	(1.9)	1.2	0.1	
Wholesale Trade	14.5	13.0	13.8	13.9		(1.5)	(0.6)	0.9	0.1	
Retail Trade	48.4	37.1	40.9	44.3		(11.3)	(4.5)	7.2	8.4	
Transportation, Warehousing, and Utilities	39.4	25.8	25.9	25.9		(13.6)	(14.0)	-	(0.1)	
Information	16.2	14.9	15.7	16.3		(1.3)	(0.1)	1.4	0.6	
Financial Activities	43.0	41.0	40.9	41.0		(2.0)	(1.2)	0.0	0.0	
Professional and Business Services	106.4	94.5	99.4	100.1		(11.9)	(6.9)	5.6	1.2	
Professional, Scientific, and Technical Services	61.7	58.5	60.0	61.0		(3.2)	(0.7)	2.5	1.0	
Educational Services	79.1	47.6	47.1	59.1		(31.5)	(19.0)	(8.5)	(8.0)	
Health Care and Social Assistance	172.5	160.1	162.7	165.2		(12.4)	(7.3)	5.1	2.5	
Hospitals	98.7	97.2	96.9	97.4		(1.5)	(1.3)	0.5	0.5	
Leisure and Hospitality	75.5	49.2	51.8	51.5		(26.3)	(23.0)	3.3	-2.5	
Accommodation and Food Services	61.9	29.2	40.0	41.9		(32.7)	(20.0)	16.7	1.9	
Other Services	29.0	19.2	24.5	24.6		(9.8)	(4.3)	5.1	0.2	
Government	107.1	104.9	104.4	103.8		(2.2)	(3.3)	(1.1)	(0.6)	
Federal Government	31.0	31.0	31.1	30.9		-	(0.1)	0.1	(0.2)	
State Government	10.9	10.4	10.3	10.1		(0.5)	(0.8)	(0.2)	(0.2)	
Local Government	65.2	63.5	63.0	62.8		(1.7)	(2.4)	(0.3)	(0.2)	

Note: Total employment is seasonally adjusted; job industry employment is not seasonally adjusted. Source: Bureau of Labor Statistics, Current Employment Statistics

CENTER CITY DISTRICT

While office tenants continue to pay rent actual office occupancy = only 25%-30%



CENTER CITY DISTRICT

Vacancy rate trending up, 922,173 sf vacant (17.7%) Rents holding up; Most deferring major decisions

CENTER CITY OFFICE MARKET TRENDS, 2020

SUBMARKET	Q4 2020			TOTAL ASKING RENT (PRICE/SF)	TOTAL VACANCY RATE	NET ABSORPTION (SF)
	TOTAL ASKING RENT (PRICE/SF)	TOTAL VACANCY RATE	NET ABSORPTION (SF)			
East Market	\$31.36	15.6%	-257,416			
Independence Square	\$31.16	17.1%	-57,470			
Walnut/South Broad	\$30.75	20.2%	-33,514			
West Market	\$34.21	14.2%	-88,110			
CENTER CITY	\$34.53	15.4%	-536,536			

SUBMARKET	Q1 2021			TOTAL ASKING RENT (PRICE/SF)	TOTAL VACANCY RATE	NET ABSORPTION (SF)
	TOTAL ASKING RENT (PRICE/SF)	TOTAL VACANCY RATE	NET ABSORPTION (SF)			
East Market	\$32.89	15.7%	-2,767	\$32.66	15.7%	-1,225
Independence Square	\$31.16	16.8%	-84,796	\$31.72	16.8%	-193,567
Walnut/South Broad	\$30.99	21.6%	-55,084	\$30.49	22.1%	-75,531
West Market	\$35.93	15.3%	-168,815	\$36.03	17.3%	-651,050
CENTER CITY	\$34.20	16.2%	-311,462	\$34.09	17.7%	-922,173

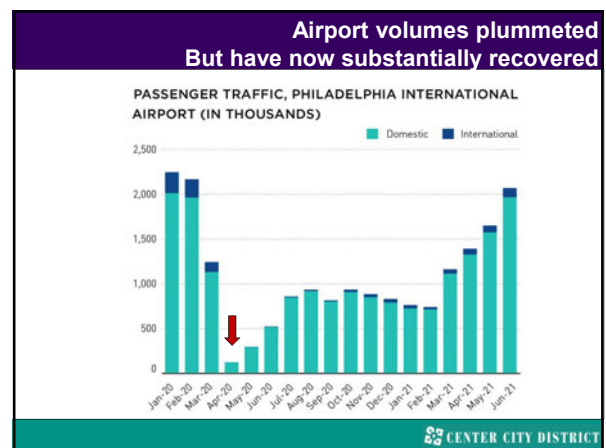
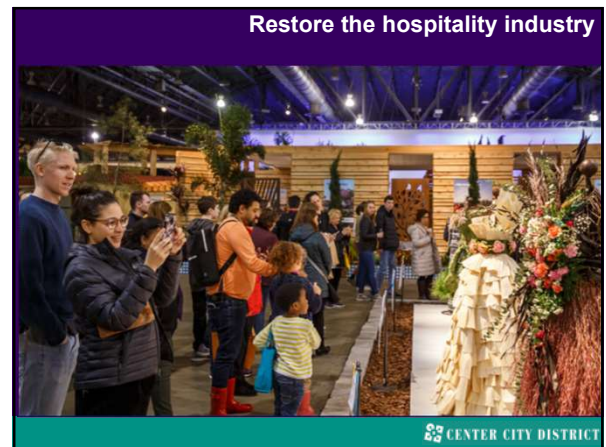
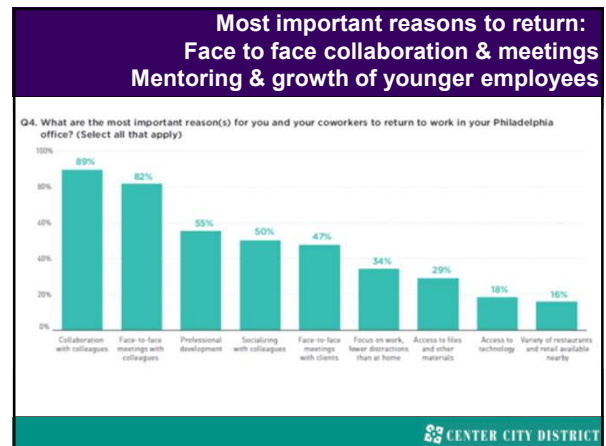
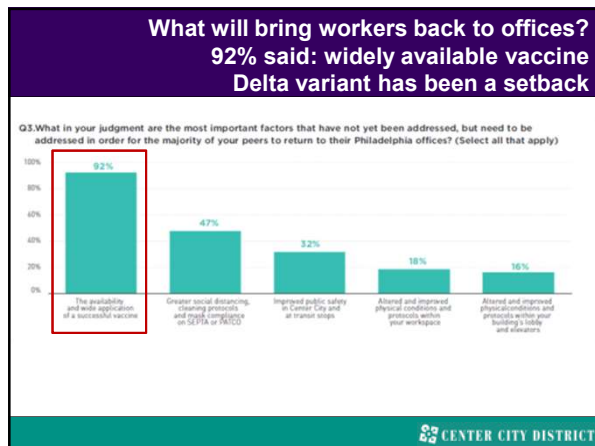
Source: NAIOP's Q1 2021 Philadelphia Office Market Report

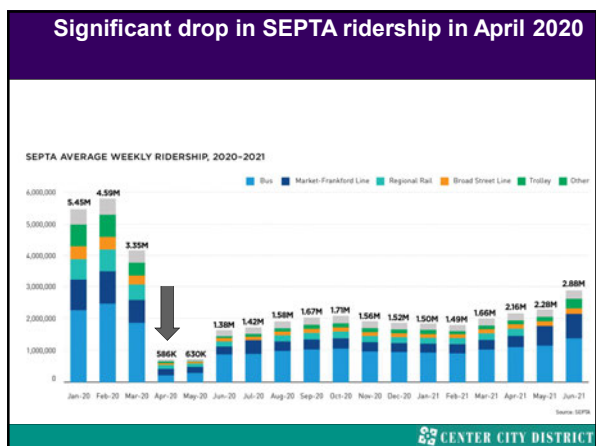
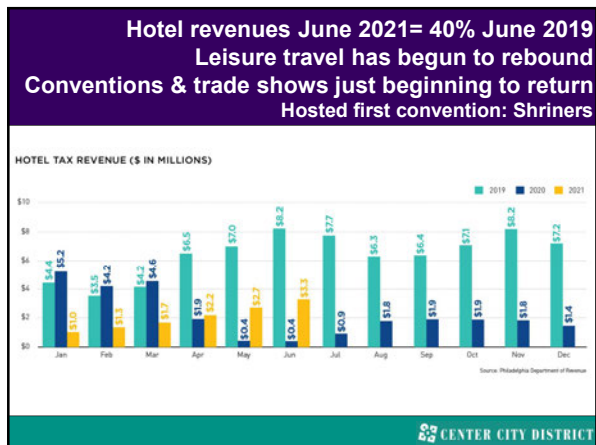
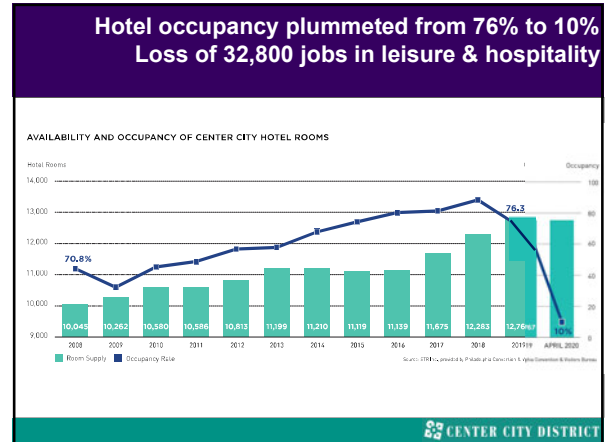
CENTER CITY DISTRICT

New life-sciences & biotech lab space drivers of new demand



CENTER CITY DISTRICT





Extensive new cleaning protocols Improved ventilation



CENTER CITY DISTRICT

Mask requirements



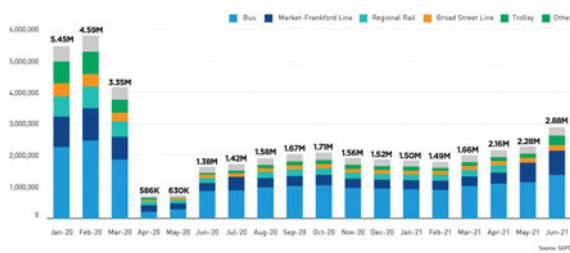
SEPTA

PHILADELPHIA

CENTER CITY DISTRICT

Returned to 63% of pre-pandemic levels Regional rail ridership doubled before Delta

SEPTA AVERAGE WEEKLY RIDERSHIP, 2020-2021



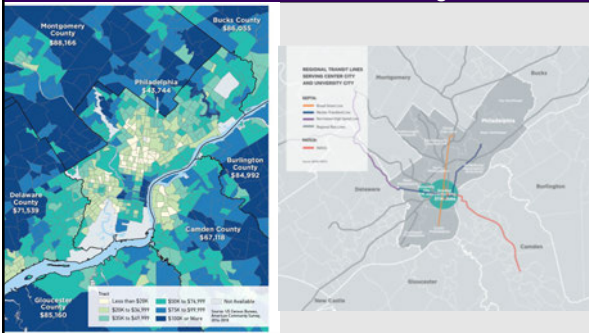
CENTER CITY DISTRICT

Regional rail draws from outer neighborhoods & suburbs 335,000 workers, 47% of Philadelphia's workforce Live outside the city



CENTER CITY DISTRICT

Transit & regional demographics City assumes 15% of suburban workers remain remote Loss of \$120 million in wage tax revenues



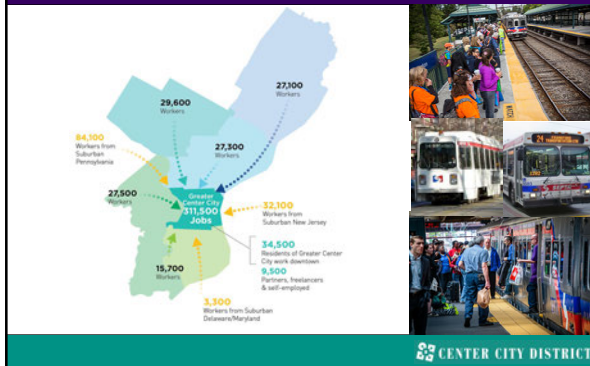
CENTER CITY DISTRICT

In absence of other passengers, significant increase in addicted individuals on transit system



CENTER CITY DISTRICT

Chicken/egg problem: Behavioral problems will decline when riders return; but riders worried about behavioral problems



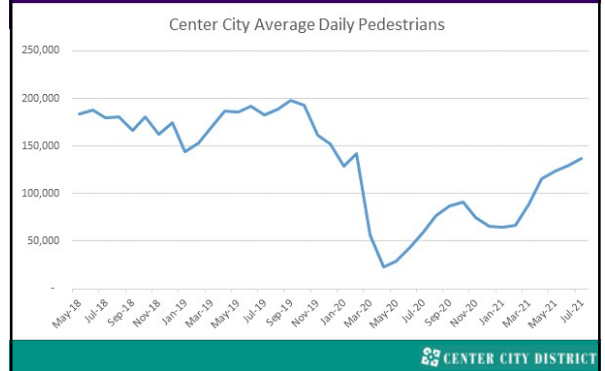
Joint outreach with Merakey Co-service delivery model



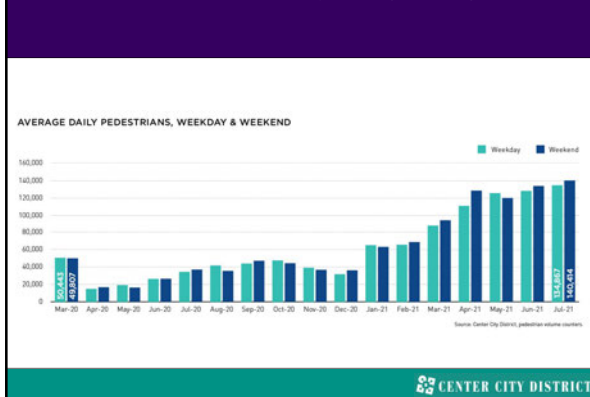
20 pedestrian counting sensor locations



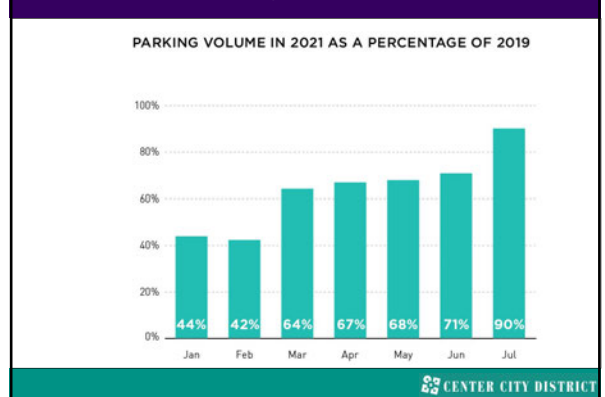
April 2020: pedestrian volumes dropped by 80% Rose through summer 2020 until 2nd spike

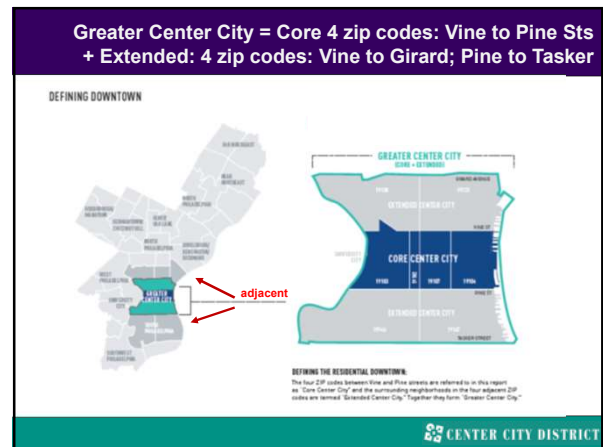
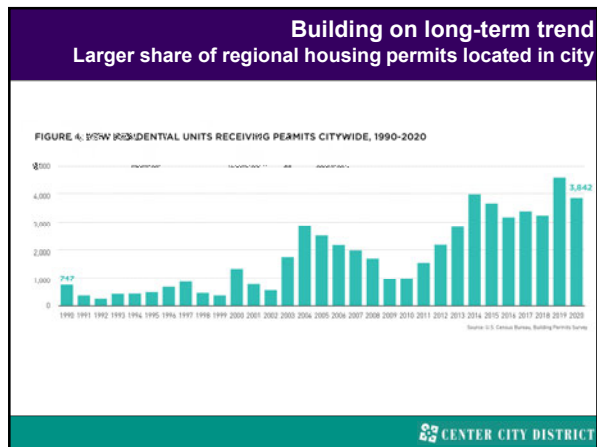
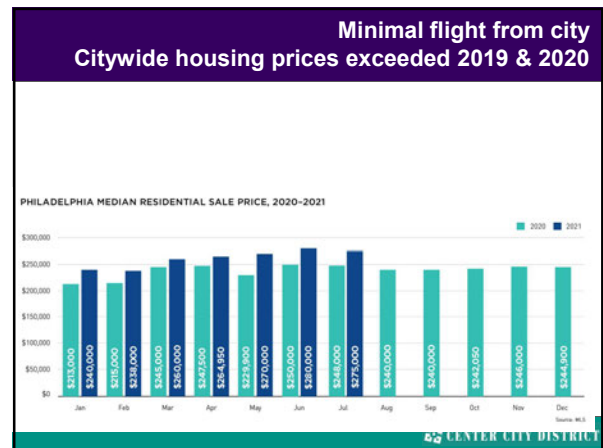
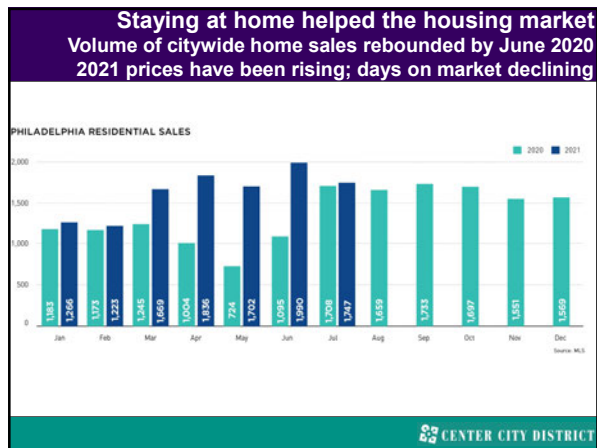


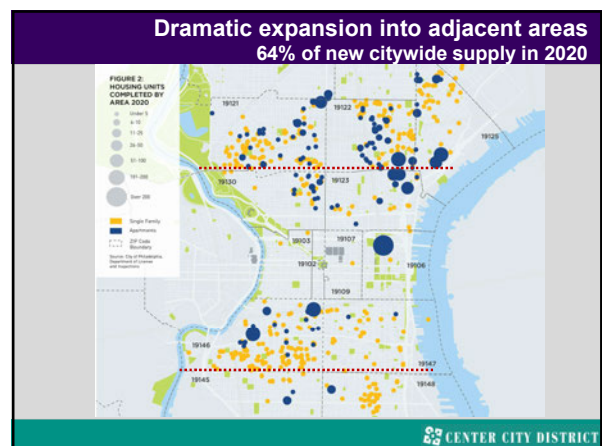
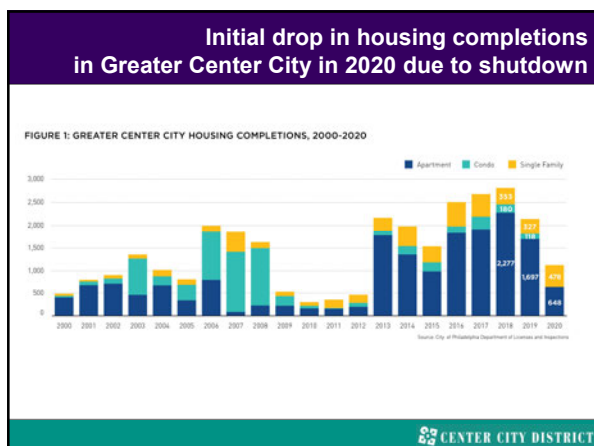
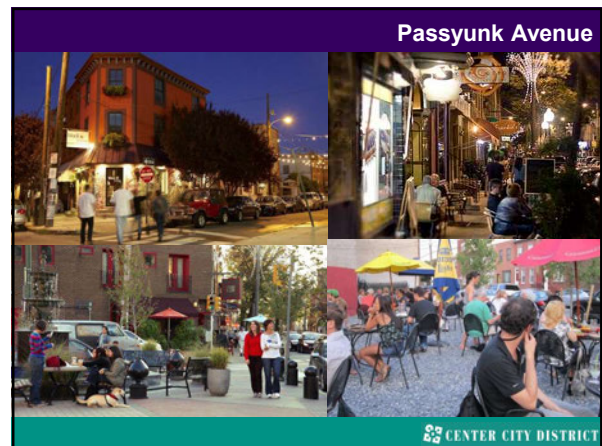
Steadily rising throughout 2021



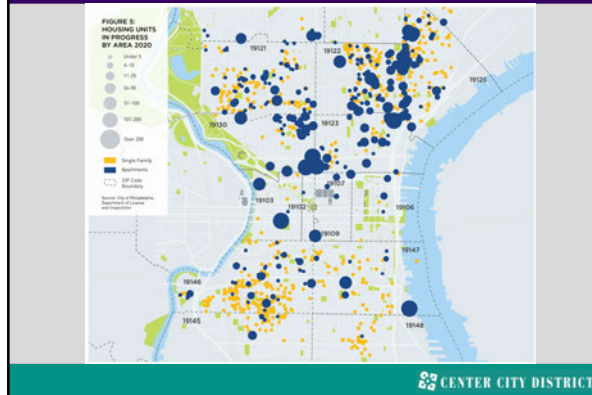
Off-street parking: 90% of pre-pandemic levels







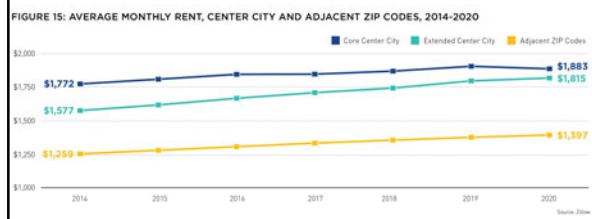
9,843 units in production at start of 2021



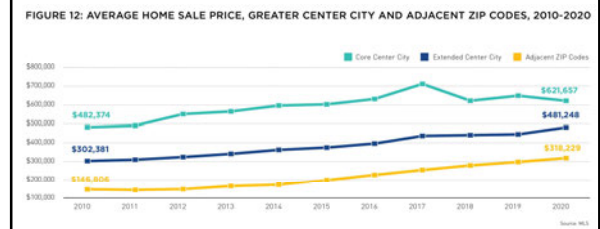
Frankford Avenue in Fishtown



Rents continued to rise, tapering slightly in core



Sales prices continue to rise, tapering slightly in core



Invest time & resources in detailed reports On economic, transit & housing trends Reports on our website www.centercityphila.org



Developer confidence remains strong Both the Laurel & Arthaus approaching completion



Toll proceeding at Broad & Noble @Rail Park



Jefferson moving forward: 1100 block of Chestnut



Out of ground with steel



19 story Specialty Care Pavilion

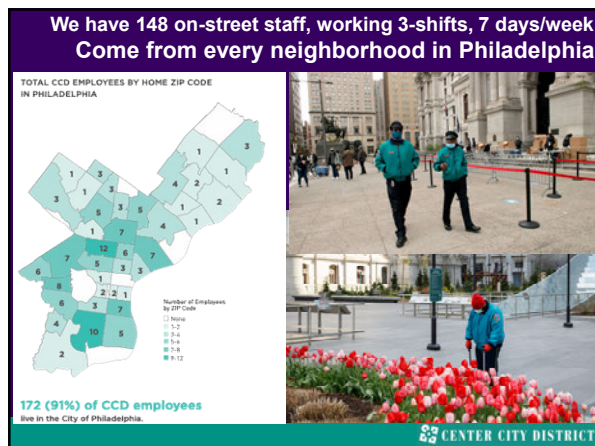
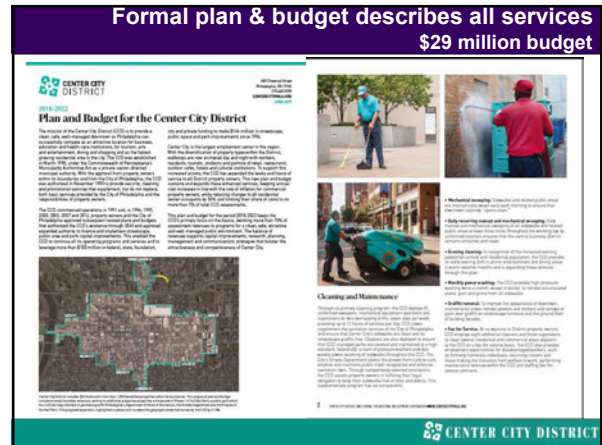
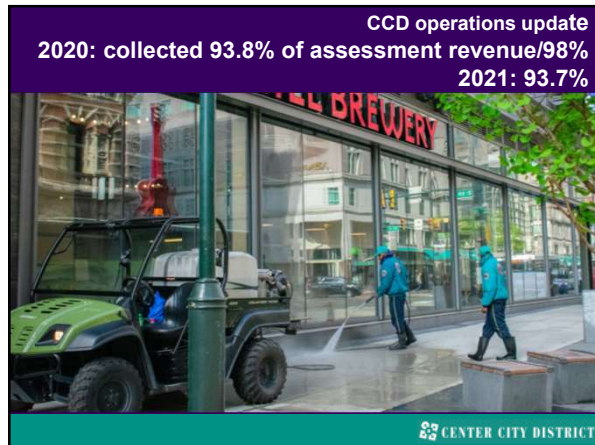


Parkway: 2200 Market, Morgan Lewis
Out of the ground



PMC moved forward at 23rd & Race





Each walkway swept manually minimum 3 x day



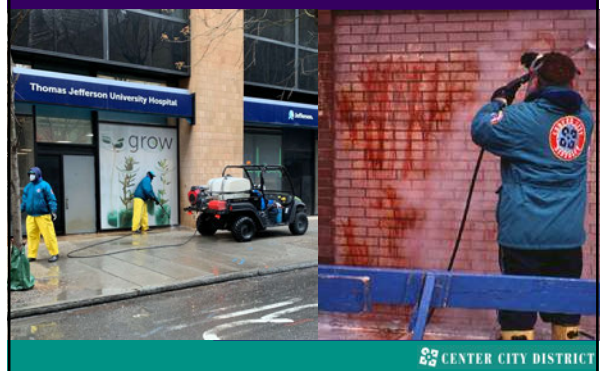
Two time per day mechanical cleaning



Pressure washing with sanitizers



Stepped up efforts to remove graffiti from building facades



When graffiti appeared on boarded storefronts



We painted over graffiti at 56 locations downtown

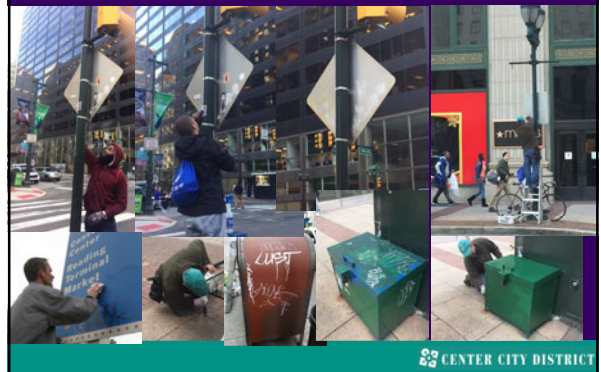


**Partnered with Mural Arts, contracted with 11 artists
To make a virtue of necessity**



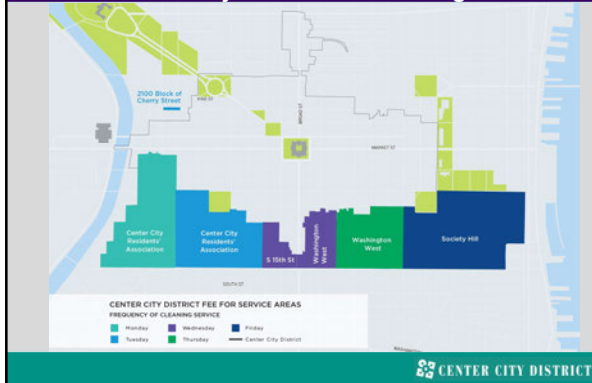
CENTER CITY DISTRICT

**Expanded contract with Graffiti Removal Experts
Hire formerly homeless individuals &
Returning citizens to remove graffiti from publicly owned street furniture**



CENTER CITY DISTRICT

**We've continued fee-for-service cleaning contracts
With adjacent residential neighborhoods**



CENTER CITY DISTRICT

**We continued all public safety
Community Service Representative (CSR) sidewalk patrols**



CENTER CITY DISTRICT

**Public safety
Community Service Representatives**



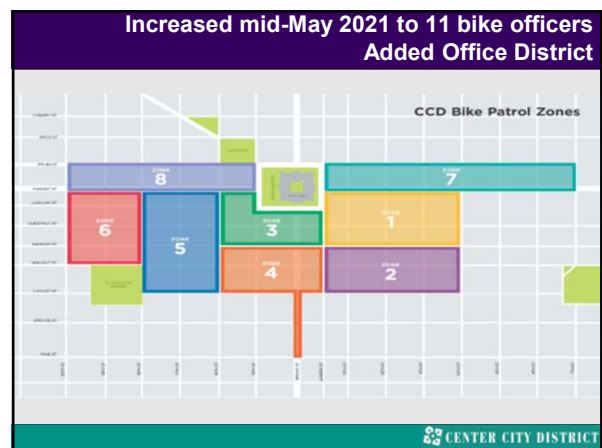
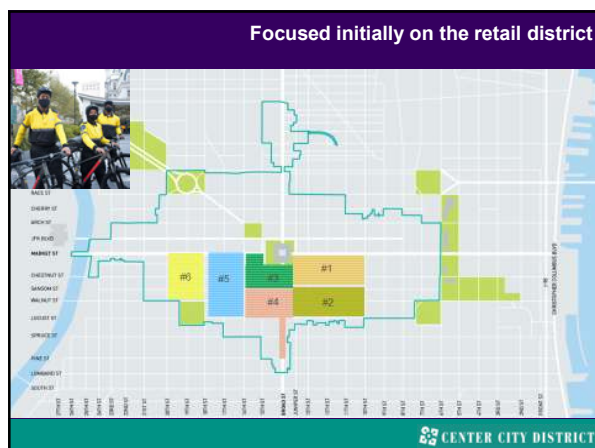
- 40 CSR's
- 6 Supervisors
- 7 days per week

CENTER CITY DISTRICT

**A welcoming presence
& source of information on the street**



CENTER CITY DISTRICT

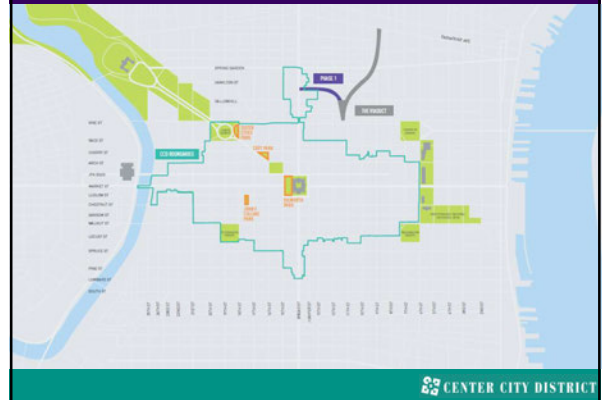


Well managed public spaces also key to recovery



CENTER CITY DISTRICT

We manage four parks within our District



CENTER CITY DISTRICT

Including Dilworth Park: Center Square



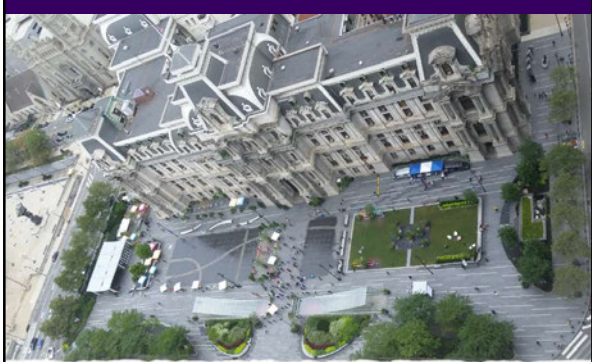
CENTER CITY DISTRICT

Began actively programming Dilworth late June 2020



CENTER CITY DISTRICT

Park with different "rooms"



CENTER CITY DISTRICT

Concerts for adults: September 30th

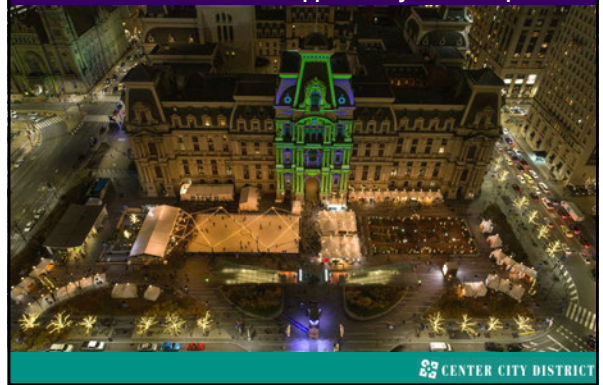


CENTER CITY DISTRICT

Harvest festival for children: October



Modified winter programming
Approved by Health Department



Rothman Rink: timed skating



Open-air Rothman Cabin



Winter garden



Winter programming for families with young children



6ABC Deck the Hall Holiday Lights



CENTER CITY DISTRICT

Opened roller rink in Dilworth Park last spring



CENTER CITY DISTRICT

Turned the fountains on for spring



CENTER CITY DISTRICT

Extensive summer/fall programs: Dilworth & Sister Cities



CENTER CITY DISTRICT

Seasonal programming for families

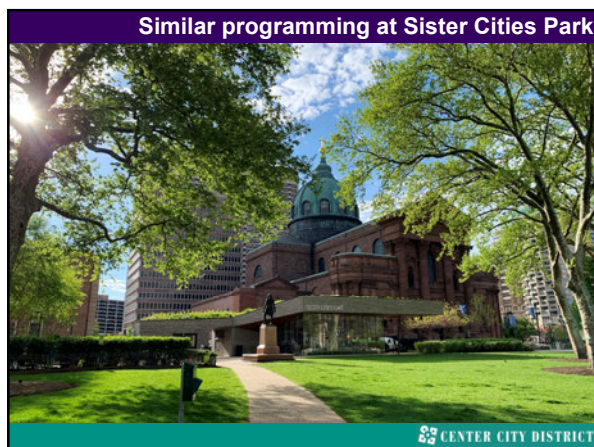
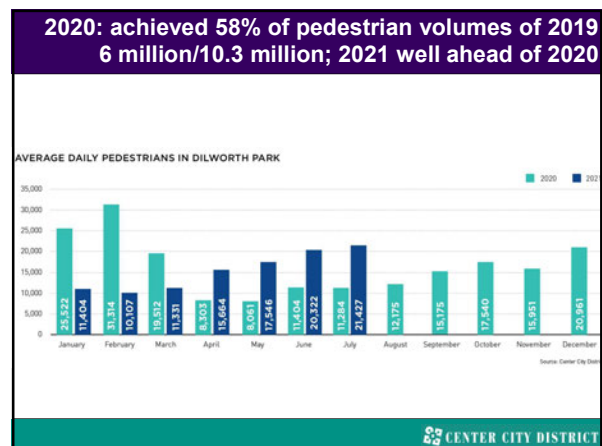


CENTER CITY DISTRICT

Exercise, music & reading for children



CENTER CITY DISTRICT





221 separate events for all audiences
Marketing, business services & parks

Summer	Center City Fit	June 1, 2021	August 31, 2021	Weekly (M & Tu)	26
	The Arts on Center Stage	June 2, 2021	August 25, 2021	Weekly (W)	13
	Live at Lunch	June 2, 2021	July 29, 2021	Weekly (W & Th)	18
	Rowed at the Roller Rink	June 3, 2021	June 24, 2021	Weekly (Th)	4
	Philadelphia Marketplace	June 11, 2021	August 28, 2021	Weekly (F & Sa)	25
	The Garden	June 13, 2021	June 13, 2021	Once	3
	Picnics in the Park (TBD)	July 9 or 16, 2021	August 27, 2021	Weekly (F)	8
	Corn Hole League	June 16, 2021	July 28, 2021	Weekly (W)	7
	SUMMER TOTAL				104
	Center City Fit	September 7, 2021	October 13, 2021	Weekly (M & Tu)	11
Fall	Live at Lunch	September 8, 2021	October 14, 2021	Weekly (W & Th)	12
	Philadelphia Marketplace	September 3, 2021	October 2, 2021	Weekly (F & Sa)	10
	Hay Maze	October 1, 2021	October 10, 2021	Once	10
	Delaware Fall Market	October 8, 2021	October 10, 2021	Once	3
	Harvest Weekend	October 8, 2021	October 10, 2021	Once	3
	FALL TOTAL				49
Summer	Live at Sater Cites Park	June 1, 2021	August 26, 2021	Weekly (Th)	13
	Discovery Garden Exhibit	TBD		Once	N/A
	Parkway Pals	June 14, 2021	August 17, 2021	Weekly (M & T)	19
	Soccer Shots Summer	July 11, 2021	August 15, 2021	Weekly (Sun & M)	12
	SUMMER TOTAL				44
Fall	Picnics in the Park or Live at SCP	September 10, 2021	October 3, 2021	Weekly (F)	4
	Parkway Pals - Saturdays	September 11, 2021	October 16, 2021	Weekly (Sa)	6
	Discovery Garden Exhibit - Scarecrows	TBD		Once	N/A
	Soccer Shots Fall	September 12, 2021	October 24, 2021	Weekly (Sun & M)	14
	FALL TOTAL				24

CENTER CITY DISTRICT

Collins Park, 1700 block Chestnut Street



CENTER CITY DISTRICT

Hosting many rental events



CENTER CITY DISTRICT

Supporting restaurants & retail



CENTER CITY DISTRICT

At beginning of 2020, restaurants, food service & retail provided 39,600 jobs, 13% of all jobs in Greater Center City

Citywide, these sectors provided 103,946 jobs, accounting for 15% of the total employment in Philadelphia
Lost 39% of those jobs by April.



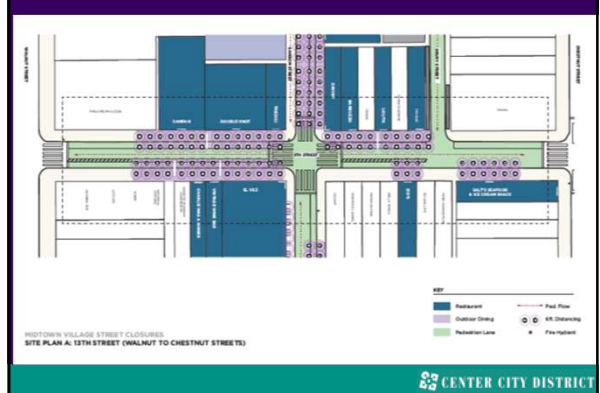
CENTER CITY DISTRICT

Worked with Streets, Commerce & retail associations to create streeteries to support restaurants



CENTER CITY DISTRICT

CCD Created detailed plans in partnership with restaurants



CENTER CITY DISTRICT

A major sign of vitality during the last year: 13th Street



CENTER CITY DISTRICT

18th street Locust to Walnut St; Rittenhouse Row



CENTER CITY DISTRICT

18th street Locust St to Sansom Street



CENTER CITY DISTRICT

An essential lifeline through the winter



CENTER CITY DISTRICT

Weatherized outdoor seating survival strategy
With remarkable creativity



CENTER CITY DISTRICT

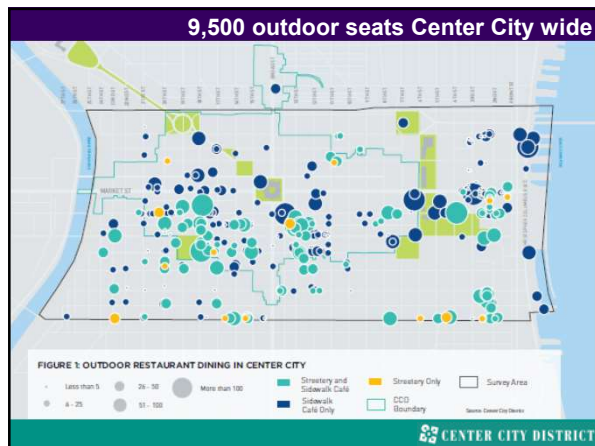
Outdoor seating more than doubled in last year
6,551 seats at outdoor cafes within CCD

OUTDOOR SEATING AT CENTER CITY DISTRICT RESTAURANTS

OUTDOOR SEATING TYPE	JUN 20*	SEP-20	DEC-20	JAN-21	FEB-21	MAR-21	APR-21	MAY-21	JUL-21
Sidewalk Cafe	N/A	2,628	2,355	1,549	1,541	1,876	2,284	2,823	3,370
Sidewalk Cafe and Streetery	N/A	2,614	2,148	1,961	1,938	2,191	2,531	2,849	2,547
Streetery Only	N/A	110	196	206	174	339	498	570	634
GRAND TOTAL	2,997	5,352	4,699	3,716	3,653	4,406	5,313	6,262	6,551

*CCD did not record seating types during first survey
** CCD did not record seats in June 2021

CENTER CITY DISTRICT



Website & social media
Promoting Center City restaurants & retail

Support Center City Businesses

This master list will keep you connected to Center City businesses still offering services at this time.

WE'RE OPEN

CENTER CITY DISTRICT

Promoted a successful modified Restaurant Week

CENTER CITY DISTRICT RESTAURANT WEEK
DINE OUT OR TAKE HOME
SEPTEMBER 13 to 25

Maker's Mark **HORNITOS**

CENTER CITY DISTRICT

Launched a new campaign in January

PHILLY WANTS YOU TO SUPPORT OUR RESTAURANTS.

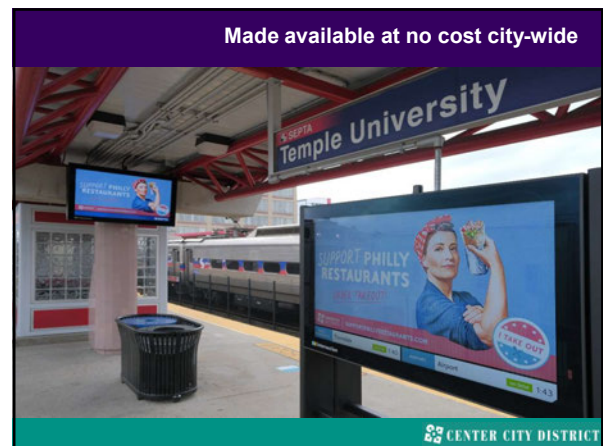
SUPPORT PHILLY RESTAURANTS

GET TAKEOUT!
ORDER DIRECTLY FROM RESTAURANTS.
SKIP THE DISHES.
TIP GENEROUSLY.

GET TAKEOUT!
ORDER DIRECTLY FROM RESTAURANTS.
SKIP THE DISHES.
TIP GENEROUSLY.

I TAKE OUT

CENTER CITY DISTRICT



May Restaurant Week with Take-out option

Center City District Restaurant Week • May 17 to 28

Center City District Restaurant Week May 17 to 28

3 COURSES: \$20 LUNCH, \$35 DINNER*

*Tax, alcohol and gratuity not included.

CENTER CITY DISTRICT

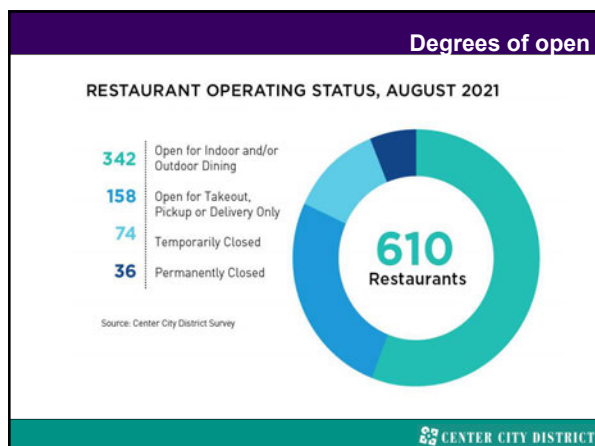
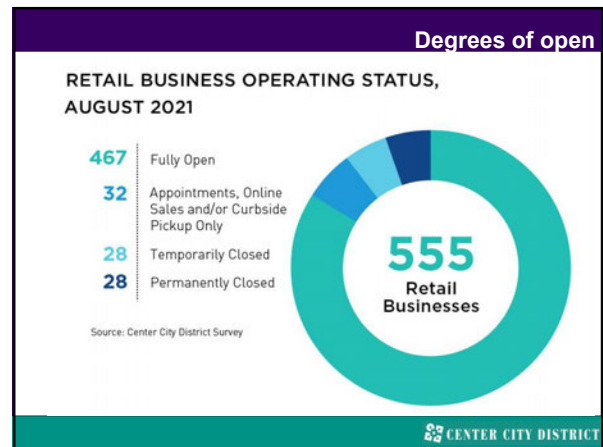
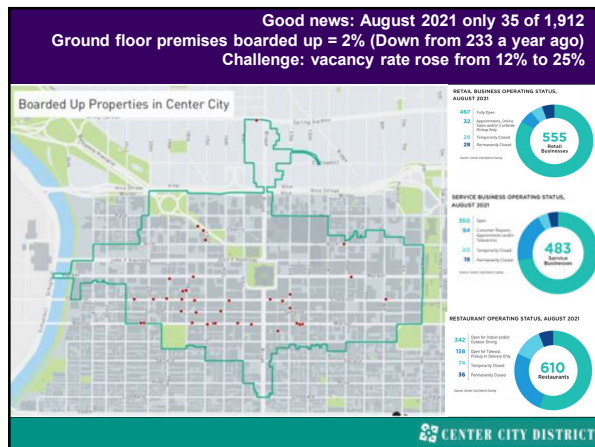
September 18-30

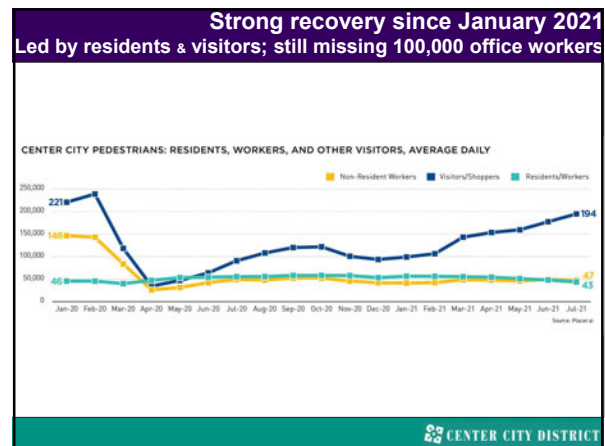
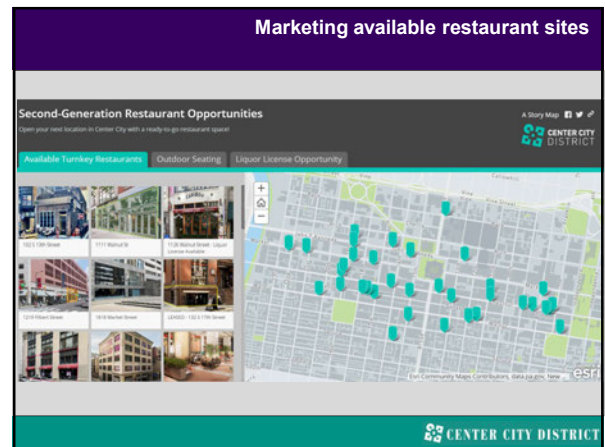
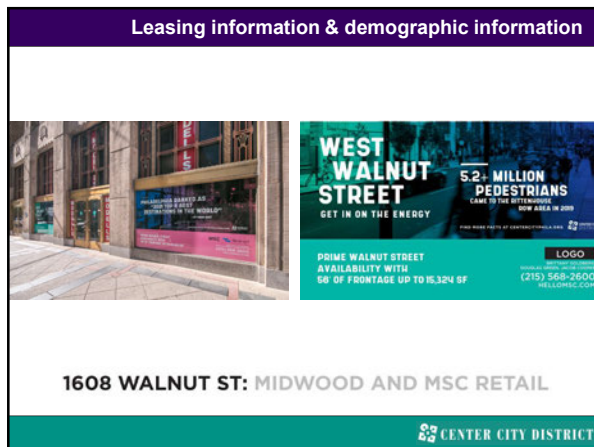
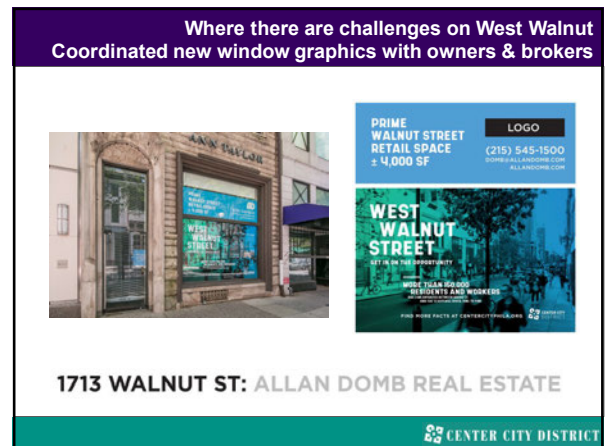
CENTER CITY DISTRICT Restaurant Week

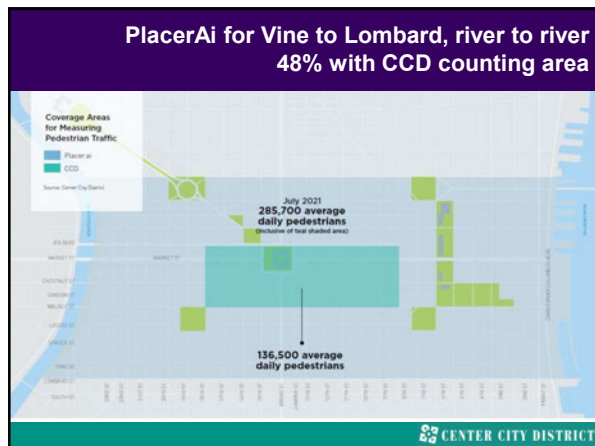
GET RE-CENTERED FILLED

Center City District Restaurant Week September 18 - 30

CENTER CITY DISTRICT



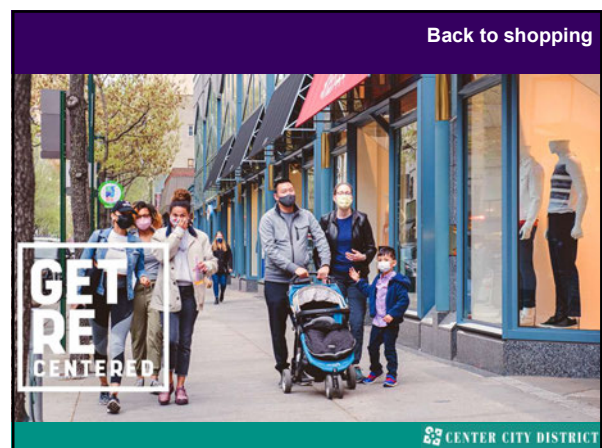




60% of pre-pandemic counts: June 2019 average daily counts

Visitors (tourists and regional shoppers)	247,240
Workers	152,503
Residents	43,980
Total	443,723

CENTER CITY DISTRICT



Back to restaurants



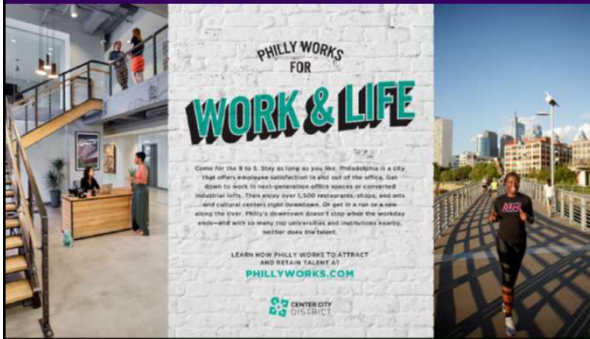
CENTER CITY DISTRICT

Preparing for fall: Business & residential attraction campaign In New York Metro market



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Highlighting affordability and work/life balance Find a place to work in Philadelphia



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Monthly recovery report: jobs, pedestrian counts, transit



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Recovery is not simply going happen on its own



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Supporting Ready.Set.Philly!



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September 18th promotion
anchored by Kimmel Center



PERFORMING ARTS

**This fall, Philly is back,
live on stage.**

COME FIND A SEAT, SETTLE IN,
AND ENJOY THE SHOW. GET RE-CENTERED.

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Restore conventions & trade shows



CENTER CITY DISTRICT

Get kids back in school



CENTER CITY DISTRICT

Return college students to the classroom



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**Well on the way to restoring vitality & economic
opportunity in Center City Philadelphia**



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Essential to recovery of the entire city



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