

Downtown Revitalization & Management City Planning 642-001

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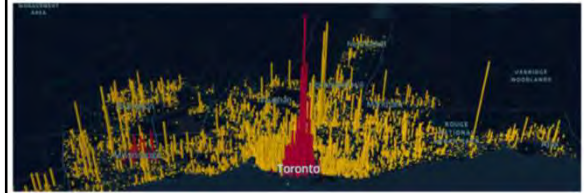
INSTITUTE of
GOVERNMENTAL STUDIES
UNIVERSITY OF CALIFORNIA, BERKELEY

Research Brief

The Death of Downtown?

Pandemic Recovery Trajectories across 62 North American Cities

Karen Chapple, Michael Leong, Daniel Huang, Hannah Moore, Laura Schmahmann, and Joy Wang



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THE WALL STREET JOURNAL

Home World U.S. Politics Economy Business Tech Markets Opinion Life & Arts Real Estate WSJ Magazine

Will Coronavirus Be the Death of Cities? Not So Fast

Cities like New York can benefit from remote technology, which allows residents to live their daily lives closer to home, in their neighborhoods.

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The Office Is Dying. It's Time to Rethink How We Work.

Bloomberg Businessweek

The Work-From-Home Boom Is Here to Stay. Get Ready for Pay Cuts

The Post-Pandemic Office Should Be a Clubhouse

'No seat, no job': Why Jamie Dimon is quietly clamping down on remote work at JPMorgan

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Philadelphia's as case study Status report on recovery from pandemic

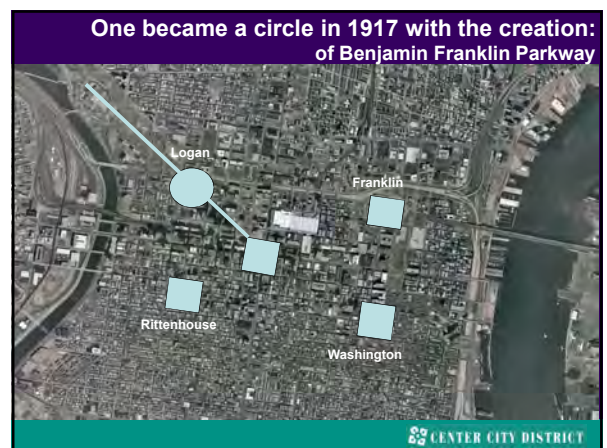
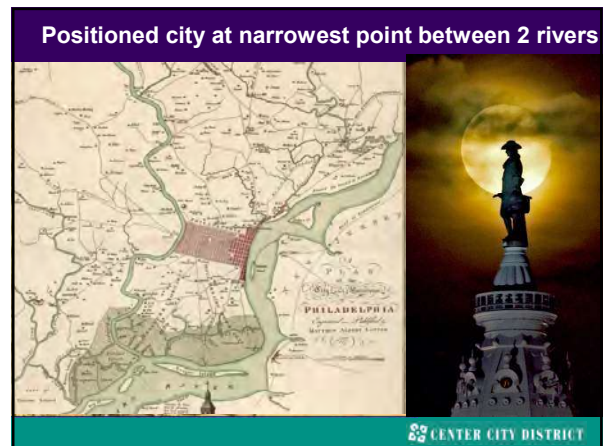
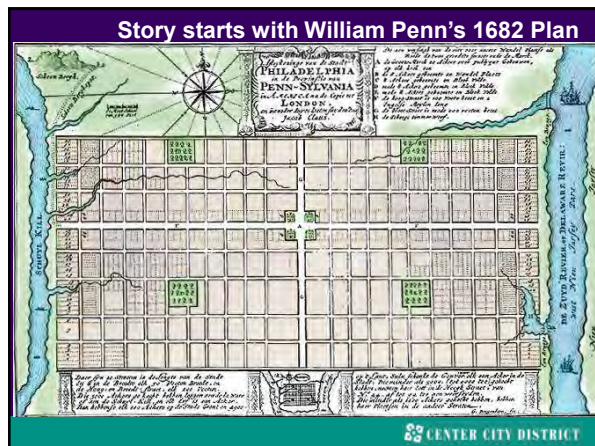


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Start by looking back at history How the city responded to prior challenges

- (1) 300 years of Philadelphia history in 5 minutes
- (2) Legacy of post World War 2: Decline & Renewal
- (3) Transformation of Center City since 1990;
Role of the Center City District (CCD)
- (4) Economic impact of stay-at-home directives &
where are we in recovery? Future of downtowns.

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From our colonial past,
We inherit a human-scale, walkable city



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Designed for horse & carriage



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Most streets: building to building line = 50-60 feet



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Our grid creates great shopping streets
Straight out of Jane Jacobs: frequent doors & openings



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Enables us to be jaywalking capital of North America



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Widest streets = 100 ft building line to building line
Typical width of all Avenues in Manhattan



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Walkability: basic building block of our DNA
Key component of competitiveness today



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Original settlement clustered close to Delaware



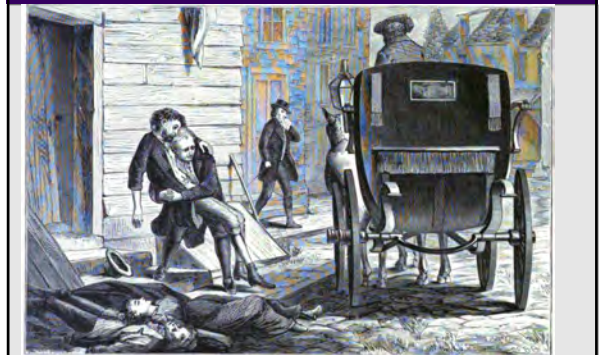
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Imported a huge number of things thru the port
Including refugees from yellow fever epidemic in Caribbean



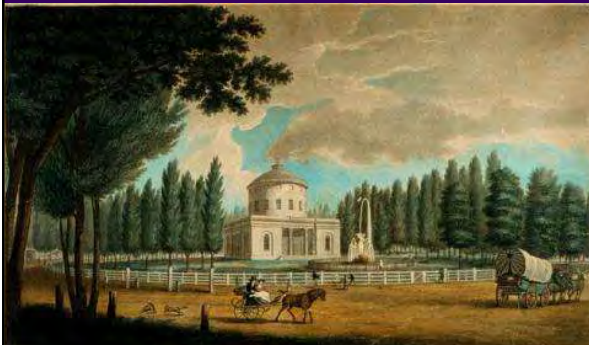
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1793: Yellow fever pandemic killed 10% of population
"Bring out the dead"



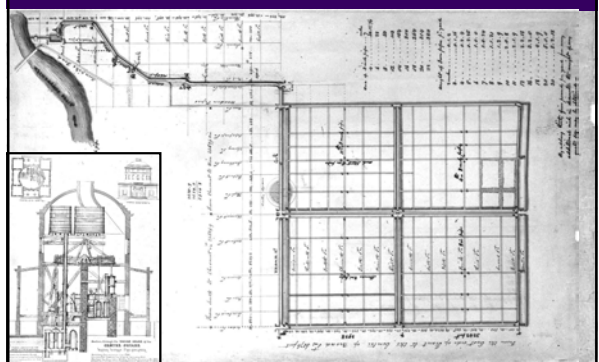
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Response: technological innovation to provide fresh water:
First steam pumping station in North America in Center Square



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Drew fresh water from Schuylkill River



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Remained central pumping station
from 1801-1828



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Now the site for City Hall & Dilworth Park



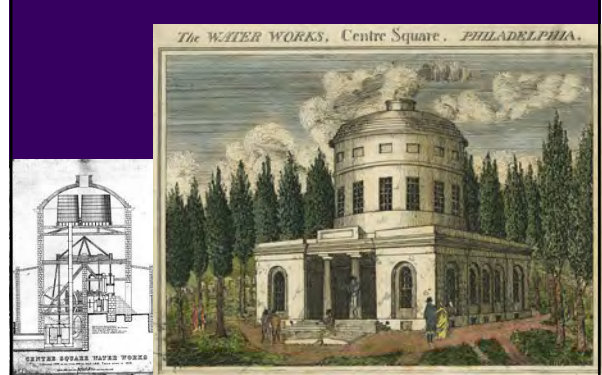
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Very different public fountain



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Waterworks in center square in early 19th century



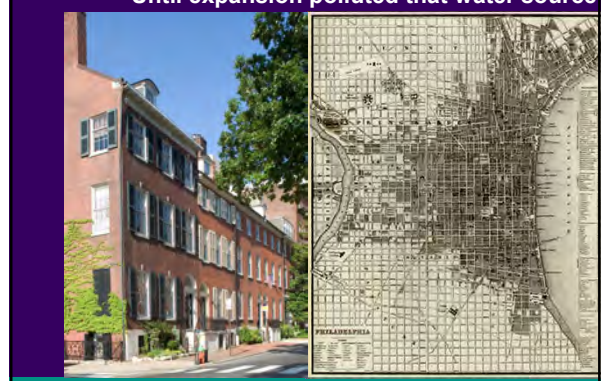
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Enabled thriving city to grow steadily west



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Until expansion polluted that water source



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Creation of the Fairmount waterworks



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Pumped water from the Schuylkill River



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Up the hill to Fair Mount



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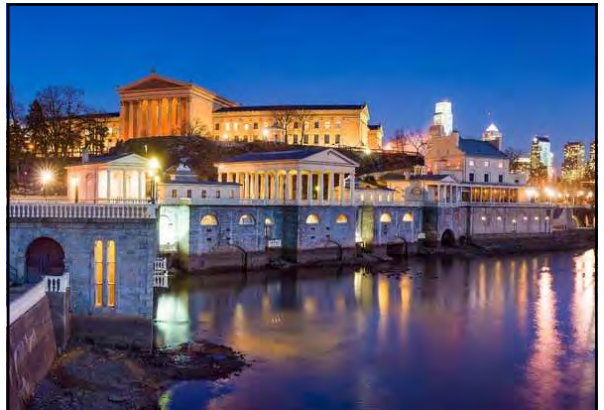
Into a reservoir where the Art Museum is today



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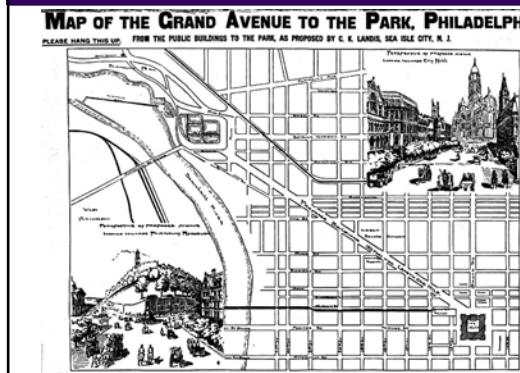
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When that too became polluted by industry
Impetus for creating Fairmount Park in 1850s
One of the largest urban parks in the US



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Genesis of the Parkway 1884: Connect City Hall to the park



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Benjamin Franklin Parkway



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Prominent diagonal cultural boulevard:
PMA, the Barnes, Franklin Institute & Academy of Natural Sciences



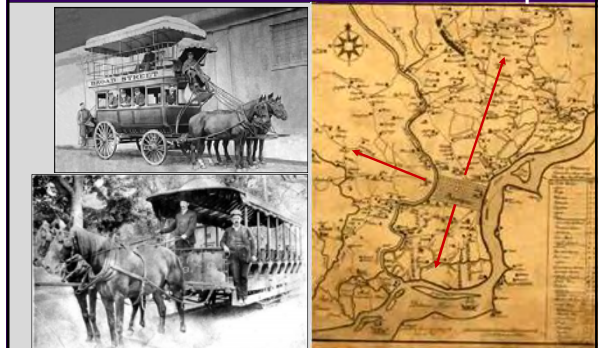
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History of innovation in response to crises
Enabled continual growth of the city: 1857



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Introduction of horse drawn, fixed-rail transit
Enabled outward residential development



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Electric trolleys made possible dense downtown development
Inherit a hub & spokes transit system



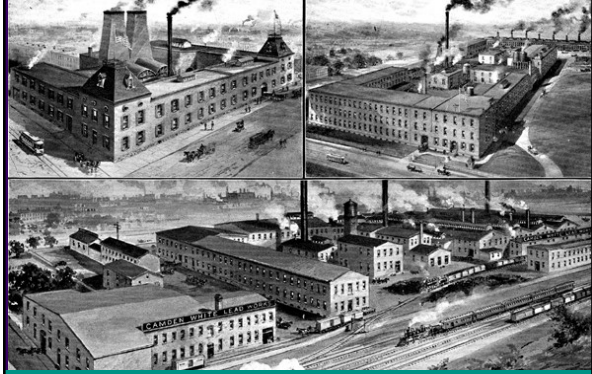
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Era of large downtown department stores



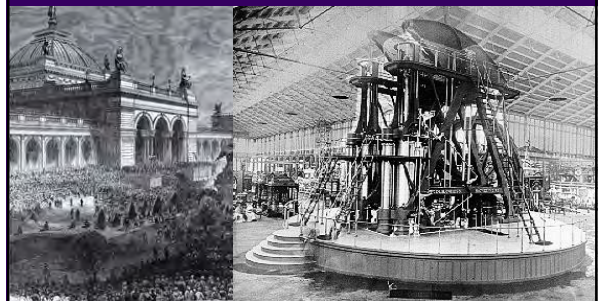
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Civil War accelerated manufacturing growth



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1876 Centennial: Celebrating industrial prowess
Corliss Steam Engine



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THE CENTENNIAL-BALLOON VIEW OF THE GROUNDS

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Became largest 19th century industrial city in North America
With major industries: Stetson Hat Factory



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Hundreds of thousands of hats each year



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Atwater Kent Radio



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Military equipment at the Frankford Arsenal



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Huge garment industry



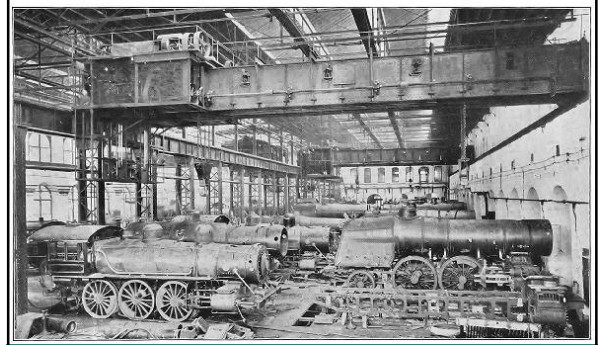
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Baldwin Locomotives



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Largest railroad train manufacturer in U.S.
8 locomotives/day; 2,663 per year



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Philadelphia in 1900: industrial neighborhoods spread north, south & west of the colonial & federal city



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Large factories were developers of rowhouses



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Mass produced working class neighborhoods
Housed immigrants from Europe & migrants from the South



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Toward end of World War 1 Liberty bond parade:
1918 Influenza Epidemic



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16,000 deaths; ½ million cases in Philadelphia
1% of the population died (Current 0.25%)

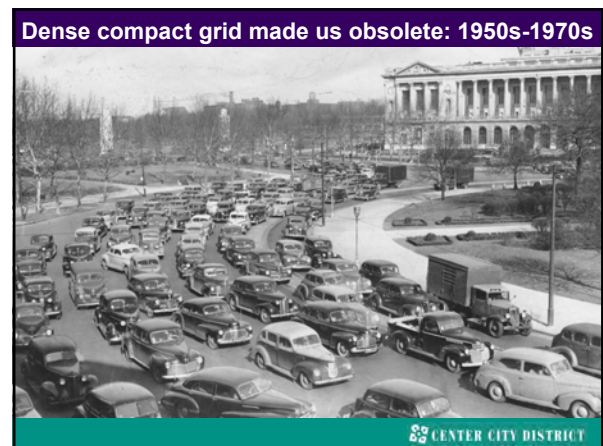
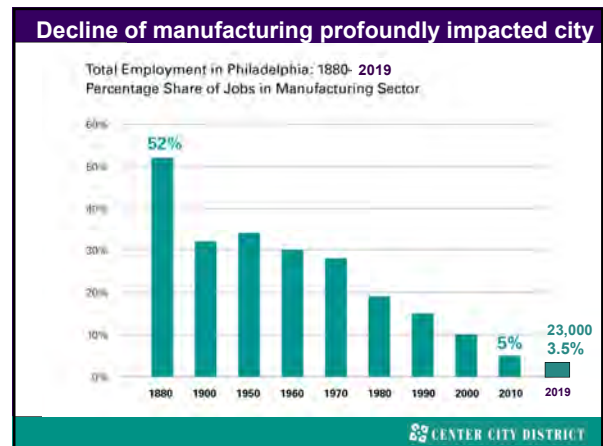
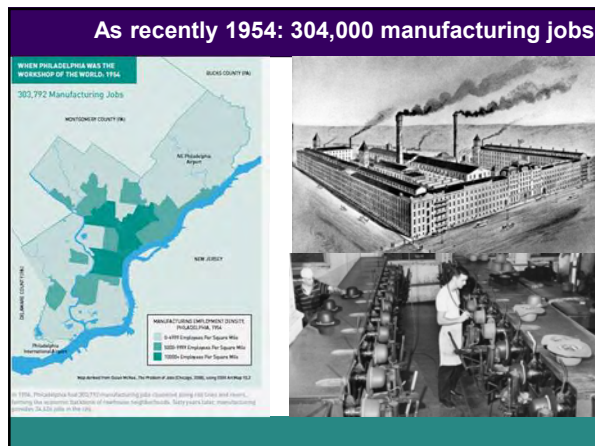


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Yet by 1921 the economy had rebounded
1920s period of extraordinary economic expansion



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Post WW 2: mass production of housing: Levittown



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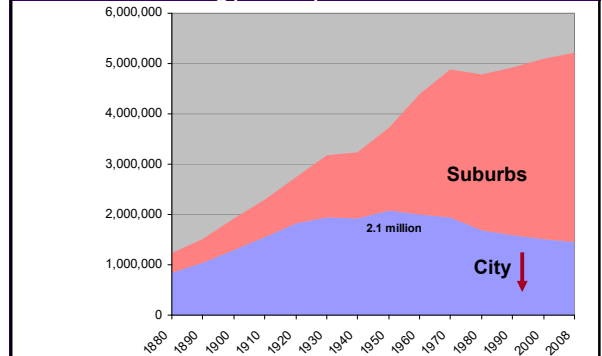
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Significant new suburban supply: Levittown



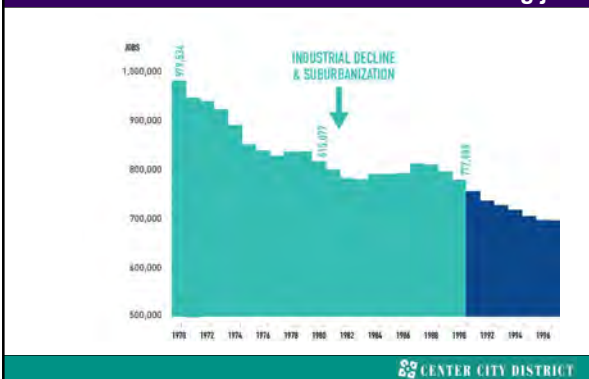
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Declining share of regional residents in the city
Declining political power at state & national level



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From 1970 through 1990s the city hemorrhaged manufacturing jobs



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Once again Philadelphia responded to the crisis.
This time of industrial decline: 1950s renewal



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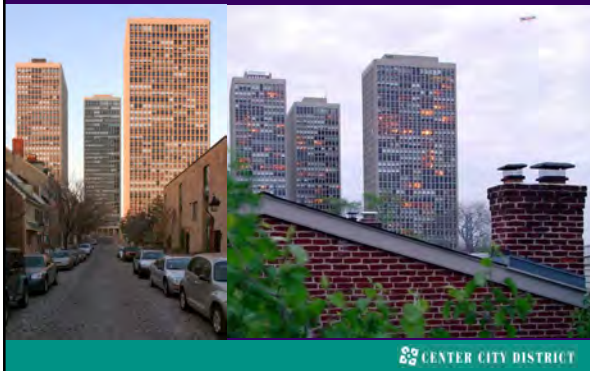
Began successful downtown revitalization program that built a post-industrial city



1956: 567 properties designated for preservation



New construction to signal change



Philadelphia has a long tradition of downtown living



1950s: Creation of modern new Office District



Broad St Station: immediately west of City Hall



1953: the demolition of elevated railroad tracks



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Penn Center



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Genesis of Dilworth Park



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1960s & 1970s: all buildings connected to transit
Innovated with "transit-oriented development"



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1960s renewal laid groundwork for our
contemporary office district



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1980s: Linked Pennsylvania & Reading Railroad
into integrated regional rail system
Center City commuter tunnel



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Employers: easy access to 360 degree labor market
300,000 riders/day take transit into downtown



Regional transit lines provide downtown employers with 360° access to a highly skilled workforce.

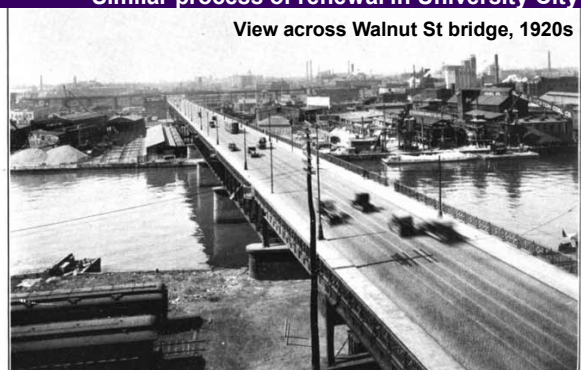
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1980s office boom:



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Similar process of renewal in University City
View across Walnut St bridge, 1920s



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Transformed into major medical & education center



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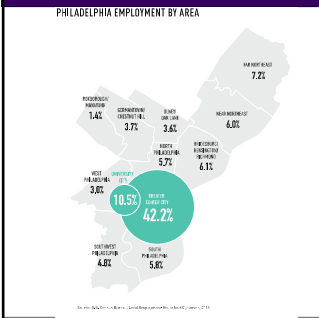
Renewal facilitated growth of education & health care



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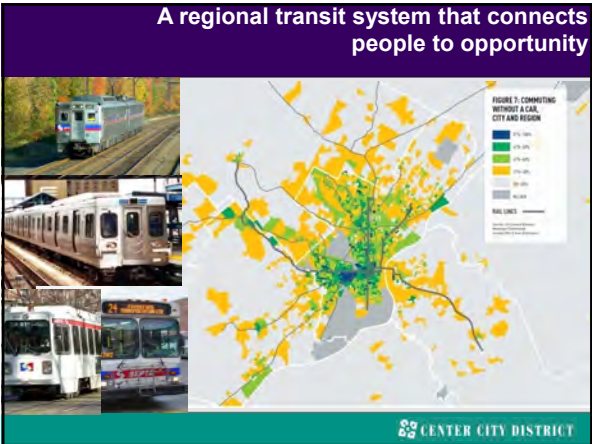
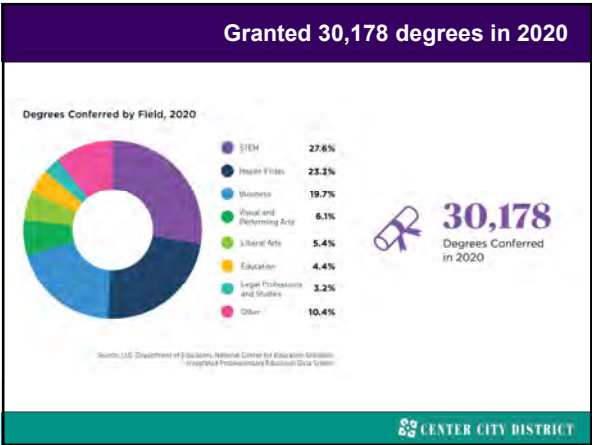
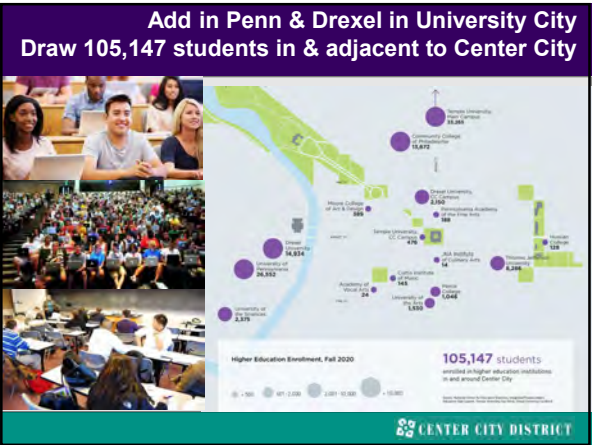
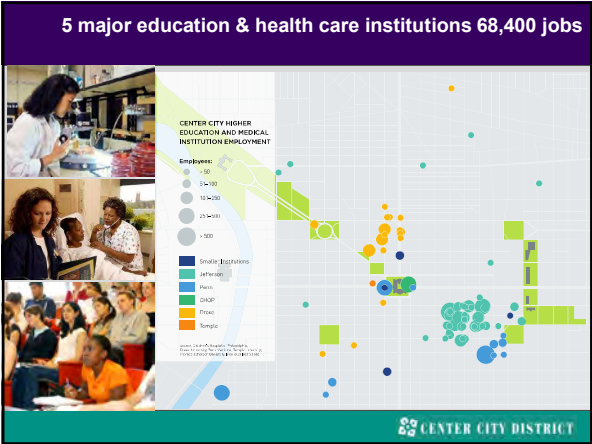
Pre-pandemic: 310,000 downtown jobs (42.2%)
Adjacent University City (10.5%)
8% of land-area = 53% of all jobs in Philadelphia

PHILADELPHIA EMPLOYMENT BY AREA



Area	Employment (%)
Center City	42.2%
University City	10.5%
Center City East	3.7%
Center City West	3.6%
Center City North	3.5%
Center City South	3.4%
Center City East	3.3%
Center City West	3.2%
Center City North	3.1%
Center City South	3.0%
Center City East	2.9%
Center City West	2.8%
Center City North	2.7%
Center City South	2.6%
Center City East	2.5%
Center City West	2.4%
Center City North	2.3%
Center City South	2.2%
Center City East	2.1%
Center City West	2.0%
Center City North	1.9%
Center City South	1.8%
Center City East	1.7%
Center City West	1.6%
Center City North	1.5%
Center City South	1.4%
Center City East	1.3%
Center City West	1.2%
Center City North	1.1%
Center City South	1.0%
Center City East	0.9%
Center City West	0.8%
Center City North	0.7%
Center City South	0.6%
Center City East	0.5%
Center City West	0.4%
Center City North	0.3%
Center City South	0.2%
Center City East	0.1%
Center City West	0.0%

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But from the beginning of renewal in 1950s



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To the highway building in 1960s and 1970s



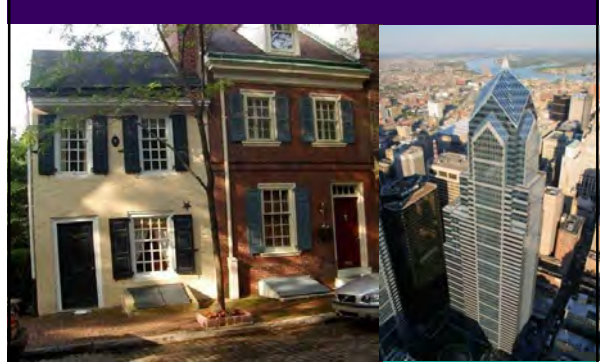
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To office development in 1980s



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Maintained careful balance of small & large scale



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Integrating old & new: another competitive asset



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1990: loss of jobs, residents & declining federal resources for cities
A degraded public environment



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Substantial ground & upper floor vacancy



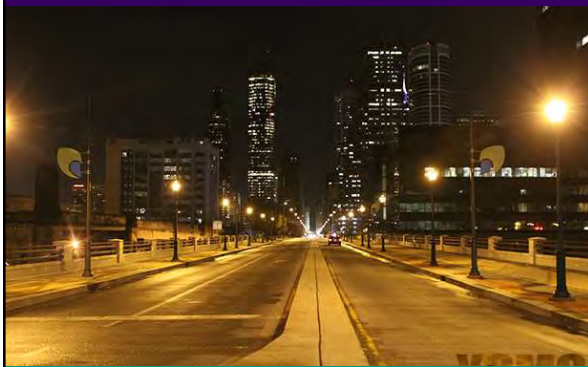
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Neglected facades, solid security gates In 2020, told my staff, "it is 1990 all over again"



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9 to 5 downtown; empty streets at night



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CCD Business improvement district created in 1990 Commonwealth's Municipality Authorities Act



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220 blocks in CBD: started with \$6.5 million operating budget Grown in 30 years to \$30 million Supplement but not replace city services

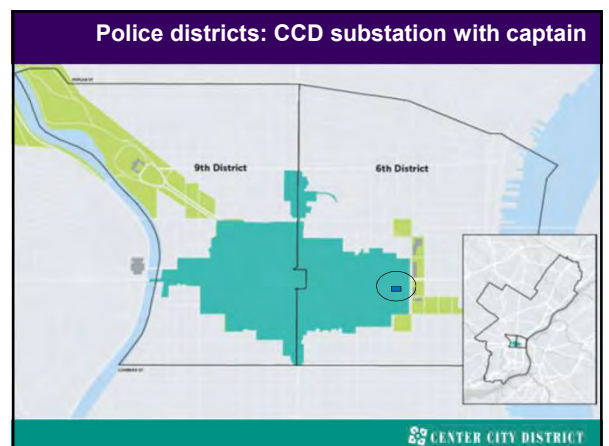
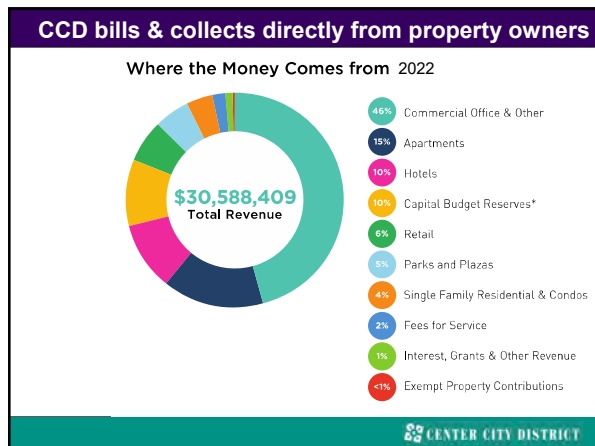


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Private sector board: broad diversity of interests

- John J. Connors, Brickstone Realty - Chairman
- Joseph S. Zuritsky, Parkway Corporation - Chair Emeritus
- Rija Beares, CBRE
- William M. Boone, LSNA
- Joseph F. Coradino, Pennsylvania Real Estate Investment Trust
- Gregory L. DeShields, PHL Diversity
- Jeffrey DeVuono, Brandywine Realty Trust
- Romulo L. Diaz, Jr., PECO
- Paige Jaffe, JLL Retail
- Ernest E. Jones, Esq., EJONES CONSULTING, LLC
- Robert D. Lane, Jr., Esq., Greenberg Traug, LLP
- Clayton Mitchell, Thomas Jefferson University and Jefferson Health
- Gregory B. Muller, SSH Real Estate
- Drew Murray, Logan Square Neighborhood Association
- Randall L. Scott, Coretrust Capital Partners, LLC
- H. Hetherington Smith, Savills
- Jack Soloff, Jr., Newmark Knight Frank
- Christophe P. Terlizzi, KeyBank
- Angela Val, Philadelphia Convention & Visitors Bureau
- Jamal Johnson, Comcast/BOMA (Ex officio)
- Carol Watson, Kimpton Hotel Palomar - Philadelphia
- Tina Byles Williams, FIS Group

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CCD Police Substation
Where Police & CSRs stand joint roll call



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CCD 1.0 Uniformed presence: "clean & safe"



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1992: Diversifying downtown land-use
Public investments: arts & entertainment



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1990: Our original skyscraper district 40% vacant



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Renovated historic theaters



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Built new theaters



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2002: Kimmel Center for the Performing Arts



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South Broad transformed into a mixed use district



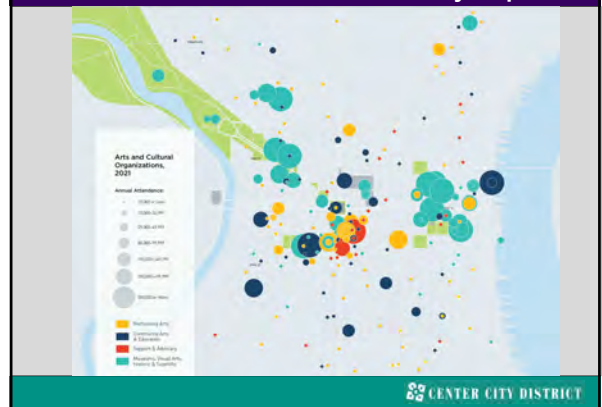
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Center City today is rich with cultural amenities



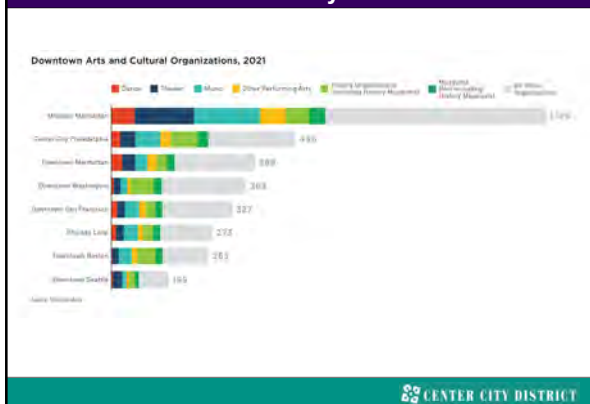
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498 cultural institutions widely dispersed



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2nd only to midtown Manhattan



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In 1993: Converted the Reading train shed



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Gateway to Pennsylvania Convention Center



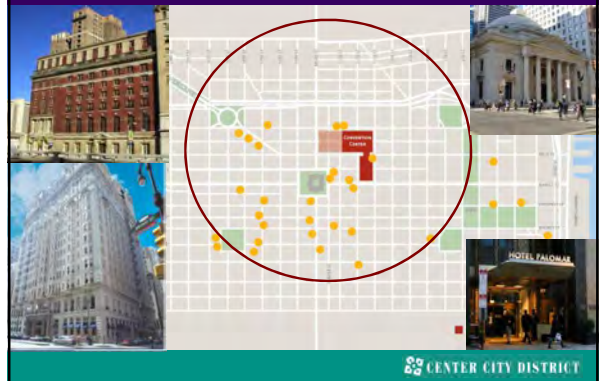
Major public investment in hospitality industry



Prompted private investment in new hotels:
reused vacant buildings



Nearly all within 15 minute walk



2001: New Independence Visitors Center



2003: New home for Liberty Bell



New Constitution Center Diversifying the hospitality industry



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National Museum of American Jewish History



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President's House



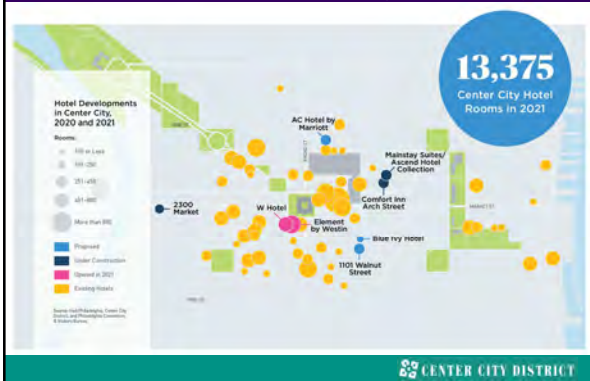
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Museum of the American Revolution



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All drove a steady increase in hotel rooms During the last 25 years



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Generated 3.5 million room nights in 2019 Dropped below 1 million in 2020; up to 2 million in 2021



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Hotel occupancy reached 76.3% in 2019 Plummeted to 30% in 2020; Back to 41% in 2021

Availability & Occupancy of Center City Hotel Rooms, 2011-2021

Year	Room Supply	Occupancy Rate
2011	10,346	72%
2012	10,815	73%
2013	11,194	74%
2014	11,210	75%
2015	11,019	75%
2016	11,039	76%
2017	11,675	77%
2018	12,283	78%
2019	12,767	76.3%
2020	10,046	30%
2021	14,318	41%

Source: CDP and Bureau Economic Research Department (Philadelphia Convention & Visitors Bureau)

88% CENTER CITY DISTRICT

Major Conventions & Events, 2022		
LARGE CONVENTIONS & TRADE SHOWS		PROJECTED ATTENDANCE
Philadelphia Auto Show	380,000	380,000
Steelcase Fall	40,000	40,000
East Coast International MFG	34,000	34,000
Johnson Space	25,000	25,000
Philly Science Center - Philadelphia Events	30,000	30,000
Philadelphia's Terms and Conditions	25,000	25,000
East Coast Philadelphia Community World Bank	23,000	23,000
PHM Unintended	23,000	23,000
National Products Expo East	20,000	20,000
Philadelphia Insurance	18,000	18,000
National Animal Services Association	14,000	14,000
Philly Law Meet	12,000	12,000
American Veterinary Medical Association	10,000	10,000
Magnum Conference American Marine Consulting Council	10,000	10,000
American College of Rheumatology	10,000	10,000
Philly International Trade Fair 2022	10,000	10,000
Northeast Qualifier 17x & 18x	9,500	9,500
American Academy of Otolaryngology	9,000	9,000
Society of Cellular Telecommunications Engineers	8,000	8,000
Philadelphia Museum of Art - Latin Street	4,000	4,000
2022 Fall Food Technology Summit	4,000	4,000
International Storage	4,000	4,000
Total Proposed Attendees For All Events	653,500	653,500
		\$15.75M

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Continuous growth in fine dining restaurants

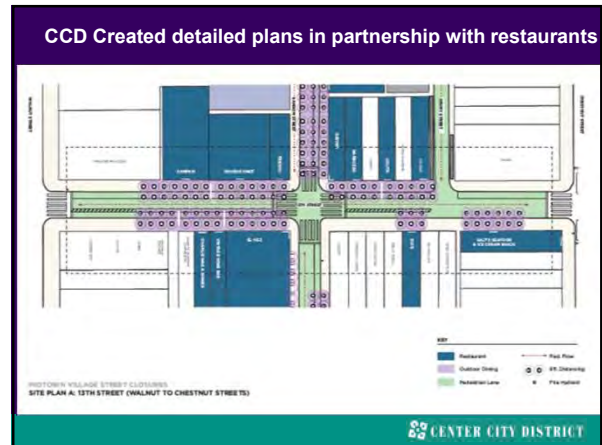
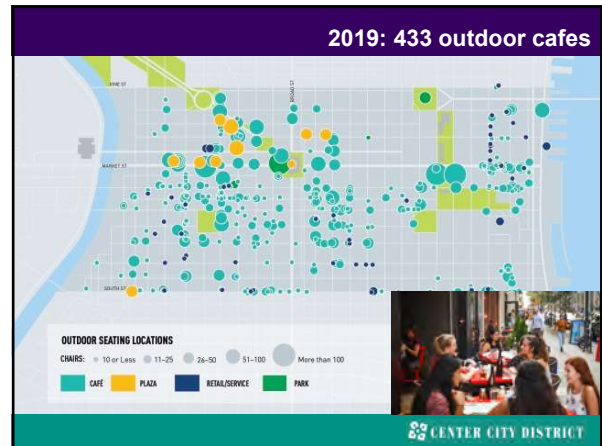
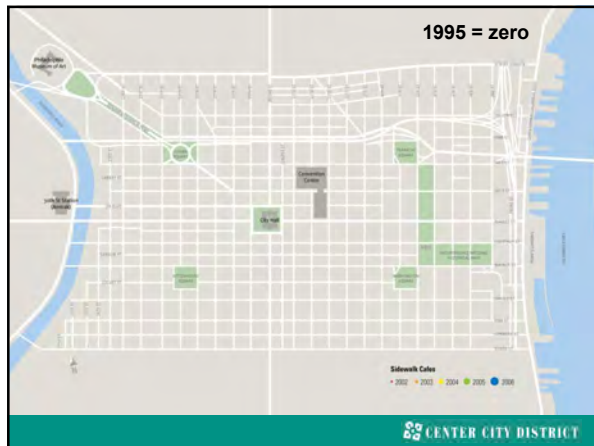
The graph illustrates the significant growth in the number of fine dining restaurants over a 27-year period. The y-axis represents the number of fine dining restaurants, ranging from 0 to 400. The x-axis represents the year, with labels for 2000, 2005, 2010, and 2019. The line starts at 65 in 1992 and rises to 497 in 2019. Three inset photos provide visual context: a chef in a kitchen, a group of people dining, and a plate of food.

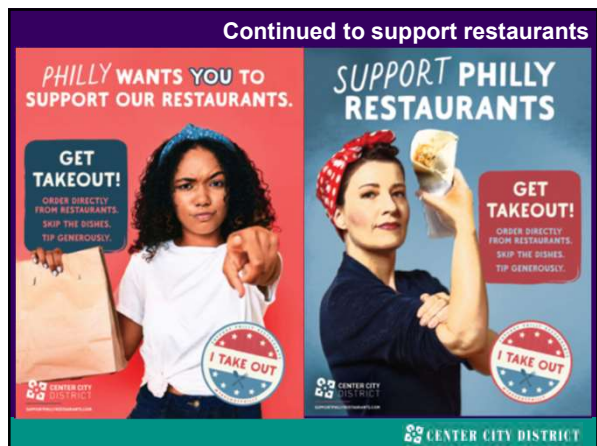
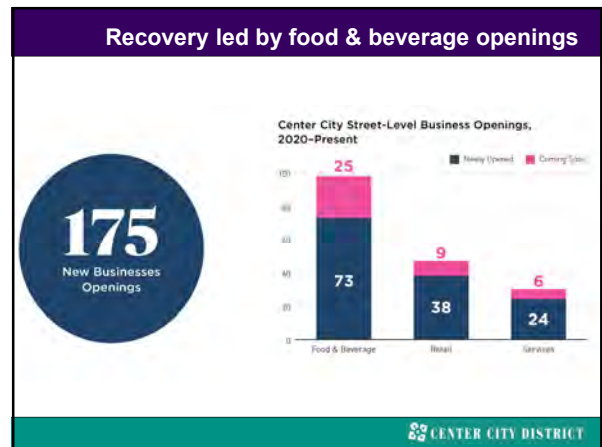
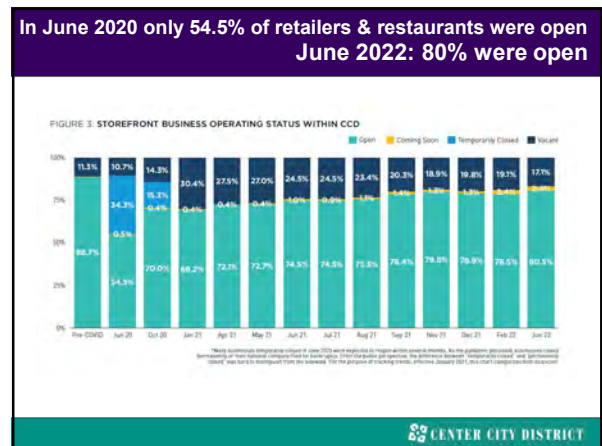
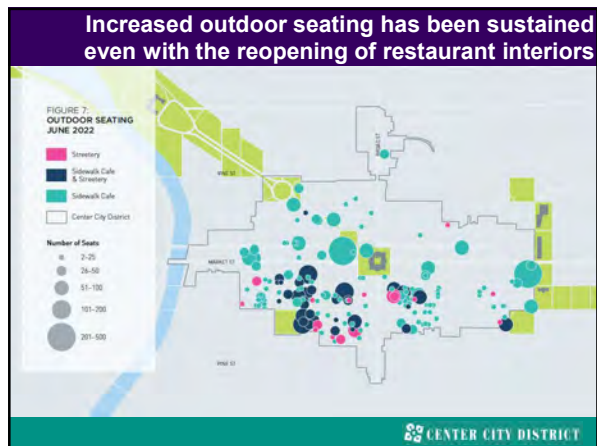
Year	Number of Fine Dining Restaurants
1992	65
2000	~325
2005	~350
2010	~400
2019	497

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497 full-service restaurants & eating establishments

Flourishing of sidewalk cafes





Center City SIPs returned on June 1st



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CCD 2.0: Improving the product
1996: financed \$26 million streetscape improvements



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Installed and maintain: 800 trees; 72 planters



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In 2018-2019 added 200 more trees



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CCD Foundation + brokers & owners funded 81 planters
& holiday decorations on Walnut from Broad to 18th Street

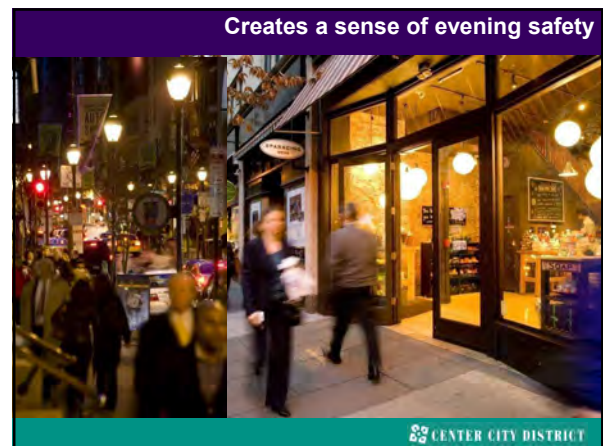
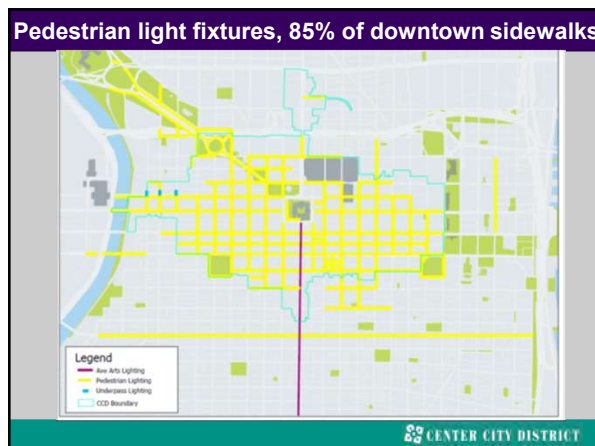
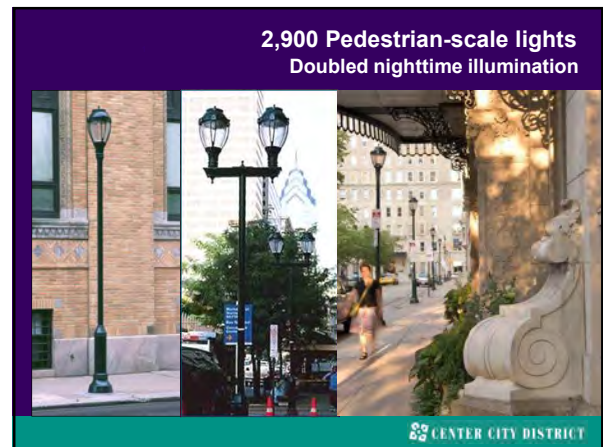
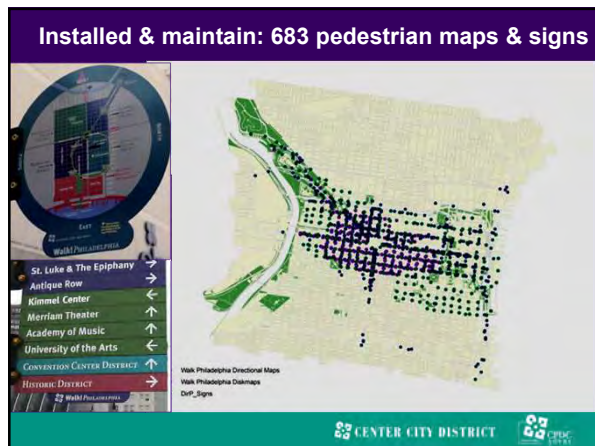


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West Market & JFK Boulevard Office District planters
Funded in partnership with property owners
Encourage return to office



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Benjamin Franklin Parkway



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Building façade lighting on South Broad Street



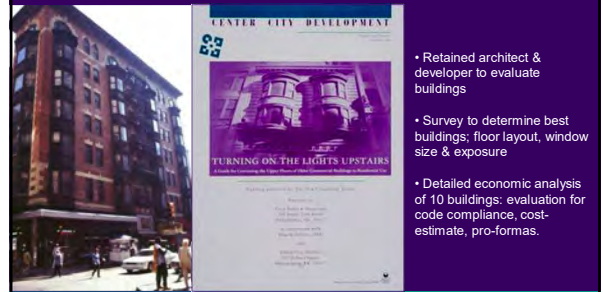
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Animating the city at night



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1996 CCD study: *Turning on the Lights Upstairs*
4.5 million sf. vacant Class “C” office space
1997: 10 year tax abatement: citywide



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Significant growth in downtown housing: 1998–2021:
180 buildings converted to residential use
9 million sf of office space: 10 year abatement



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Expanded in 2000 to include any & all construction



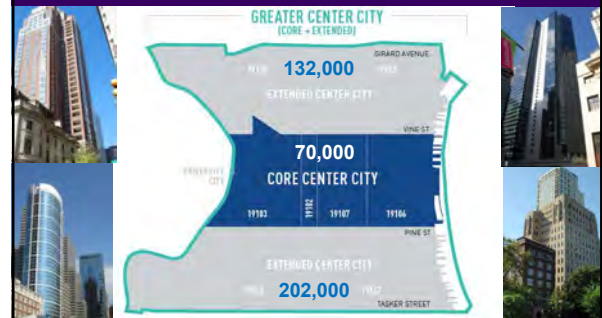
CENTER CITY DISTRICT

Since 2000 added 36,000 housing units in Greater Center City
Population grown to 202,000 up 38%
Live, work + amenities



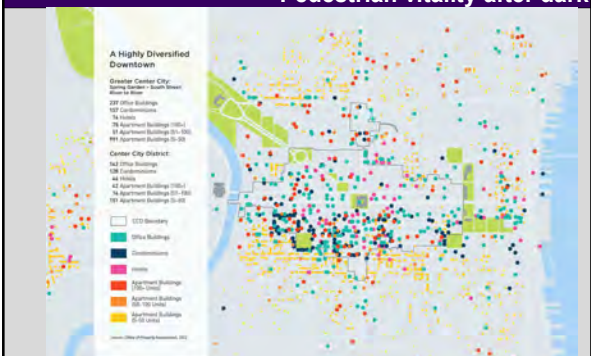
CENTER CITY DISTRICT

CBD is no longer just an office district
70,000 people live in the core; up 55% since 2000



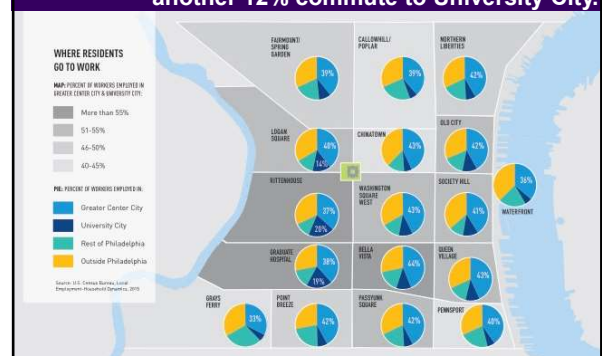
CENTER CITY DISTRICT

Dramatic diversification of downtown land-use
Pedestrian vitality after dark



CENTER CITY DISTRICT

42% of employed CC residents work downtown;
another 12% commute to University City.



CENTER CITY DISTRICT

63% of residents get to work without a car;
39% in core walk to work



CENTER CITY DISTRICT

Greater Center City demographics

Ages 20 to 34 constitute 44% of the core Center City population, compared to 26% citywide.

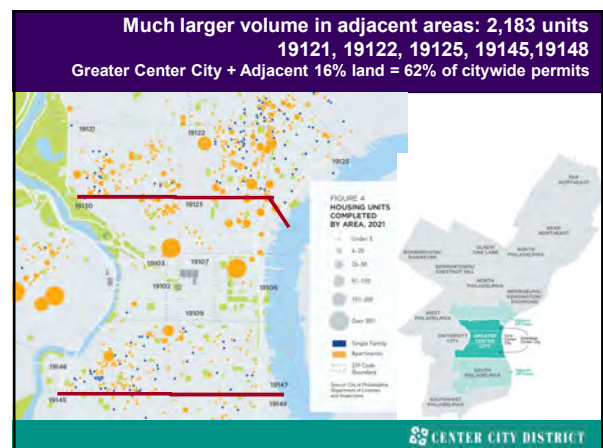
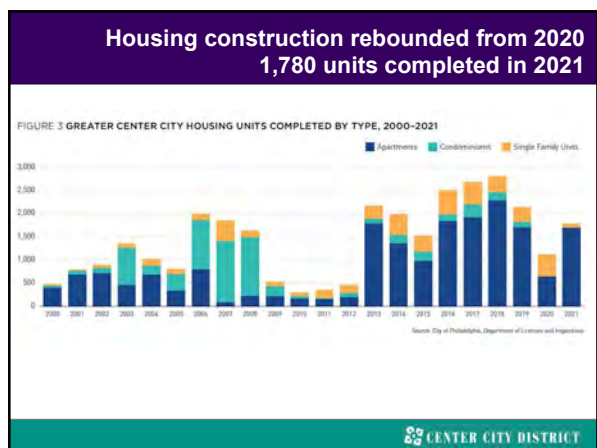
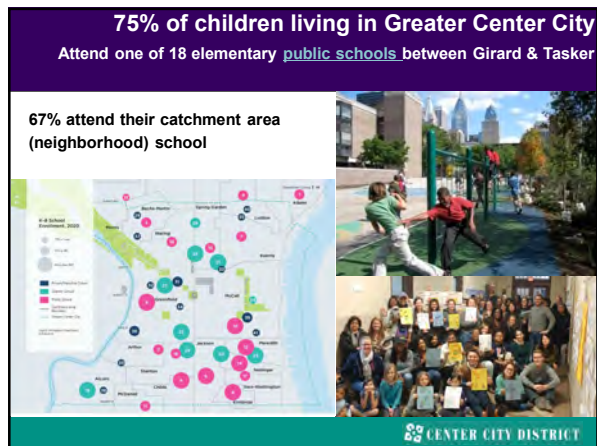
35 to 54 constitute 21% of the core, 26% of the extended neighborhoods & 24% of the citywide population.

Children under 15 in Greater Center City increased to 10.3% in 2019, compared to 18.6% citywide.

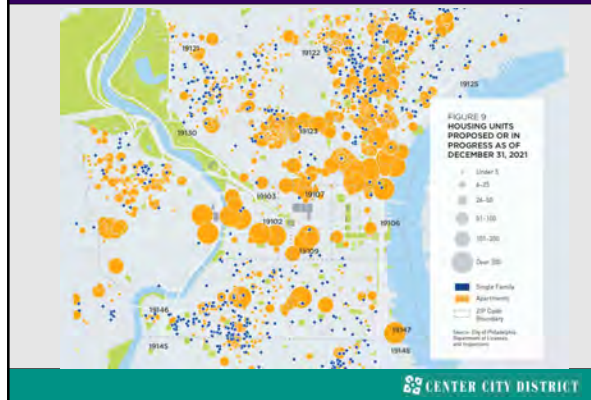
55 to 64 make up 9% of the population

65 and over constitute 18% of the population in the core.

CENTER CITY DISTRICT



2021: an explosion of permits filed: apartments

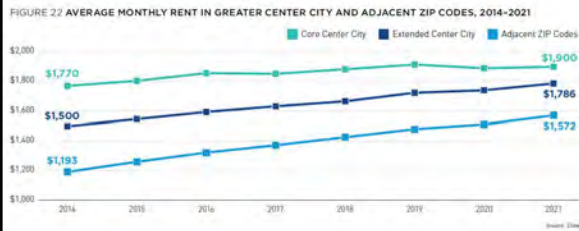


Volume of sales, prices & velocity of sales: rebounded

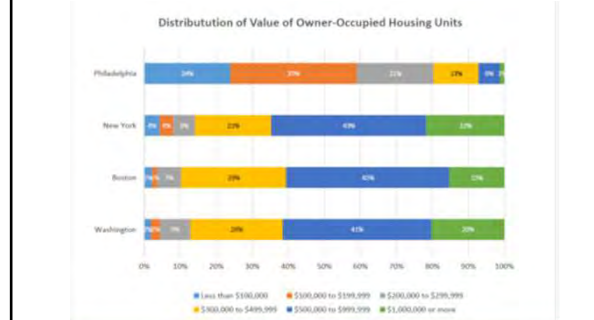
FIGURE 13: RESIDENTIAL SALES, MEDIAN SALE PRICE, AND DAYS ON MARKET, IN CENTER CITY AND PHILADELPHIA

AREA	2019	2020	2021	% CHANGE 2019-2020	% CHANGE 2020-2021	% CHANGE 2019-2021
Sales						
Core Center City	403	722	1,111	-4%	52%	28%
Extended Center City	2,221	2,485	3,234	12%	30%	44%
Greater Center City	3,624	3,207	4,344	-8%	35%	44%
Adjacent ZIP Codes	2,344	2,361	3,308	11%	17%	35%
Philadelphia	16,924	16,347	19,285	-3%	18%	15%
Median Sale Price						
Core Center City	\$405,000	\$432,000	\$425,000	7%	-2%	5%
Extended Center City	\$405,000	\$427,000	\$451,250	5%	6%	11%
Greater Center City	\$405,000	\$427,000	\$441,950	6%	5%	11%
Adjacent ZIP Codes	\$280,000	\$300,000	\$310,000	7%	3%	11%
Philadelphia	\$214,500	\$247,000	\$263,000	15%	10%	23%
Average Days on Market						
Core Center City	115	89	108	-22%	21%	-4%
Extended Center City	75	53	54	-28%	2%	-28%
Greater Center City	85	61	69	-28%	13%	-19%
Adjacent ZIP Codes	101	58	54	-47%	-8%	-28%
Philadelphia	40	44	37	-3%	-16%	-19%

Rents have continued to rise in extended & adjacent Center City levelled off; occupancy in high 90's%



Philadelphia remains very affordable to those with jobs 56% of housing units sell between \$100,000 - \$300,000 Only 1% over \$1 million

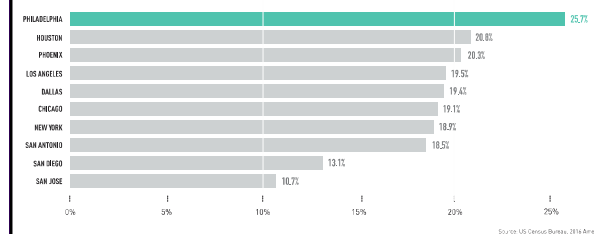


Challenge concentrated among households <\$35,000 36.4% of all city households; Philadelphia needs robust job growth

TOTAL HOUSEHOLDS	TOTAL HOUSEHOLDS	COST BURDENED	PERCENT COST BURDENED
Total Households with Income	467,337	228,227	38%
Less than \$20,000	127,325	108,493	85%
\$20,000 to \$34,999	11,972	11,001	92%
\$35,000 to \$49,999	75,189	32,438	43%
\$50,000 to \$74,999	43,895	18,782	43%
\$75,000 or more	184,249	7,313	4%
Zero or Negative Income	17,913	17,913	100%
No Cash Rent	18,902	0	0%

Highest poverty rate of 10 largest cities

POVERTY RATES AMONG THE TOP 10 LARGEST US CITIES



CCD 3.0: 2008 Improving public spaces: Cret Park
More amenities for residents & workers



CENTER CITY DISTRICT

Started with neglected empty space



CENTER CITY DISTRICT

Created a thriving gateway to the Parkway



CENTER CITY DISTRICT

Jazz Brunch on Sundays



CENTER CITY DISTRICT

Café revenue pledged to park maintenance



CENTER CITY DISTRICT

Collins Park, 1700 block Chestnut Street



CENTER CITY DISTRICT

Successful location for rental events



CENTER CITY DISTRICT

In 2012: Sister Cities Park



CENTER CITY DISTRICT

Took a barren and forgotten space



CENTER CITY DISTRICT

And transformed it



CENTER CITY DISTRICT

Into a place for families with children



CENTER CITY DISTRICT

Very successful water fountain



CENTER CITY DISTRICT

With a pond



CENTER CITY DISTRICT

And climbing mountain



CENTER CITY DISTRICT

Jumping net



CENTER CITY DISTRICT

We program events for families with children



CENTER CITY DISTRICT

Completed \$60 million renovation in September 2014



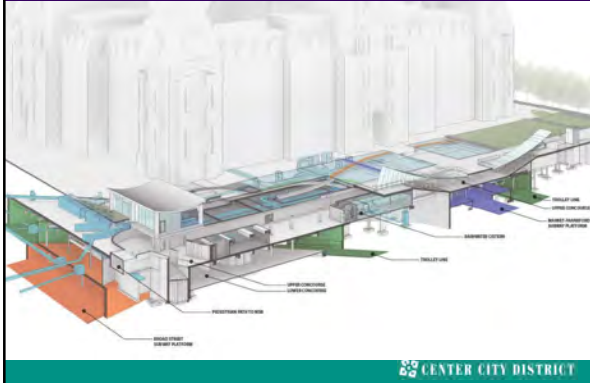
CENTER CITY DISTRICT

Barren 1970s failed space over transit lines



CENTER CITY DISTRICT

Completely reconstructed two levels
+ accessibility to transit



Goal: Create first-class gateway to transit



Began again programming Dilworth late June 2020



Kept the fountain available; public spaces key to recovery

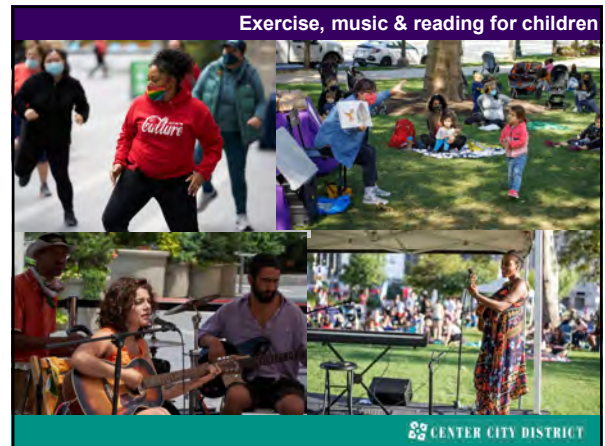


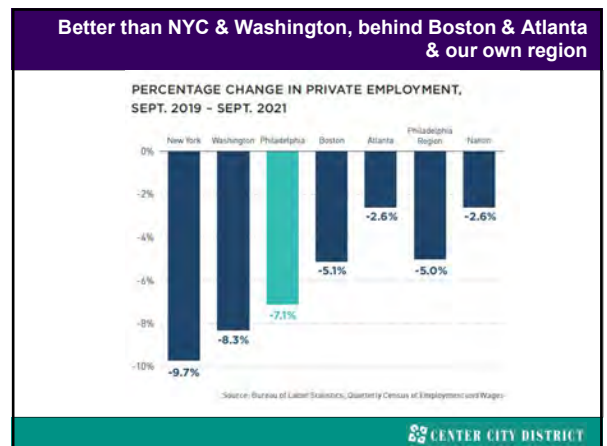
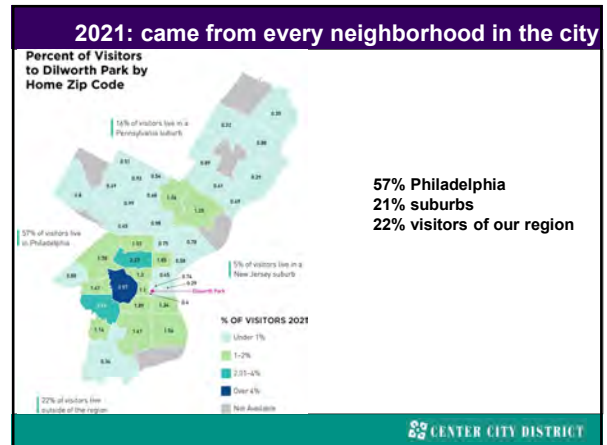
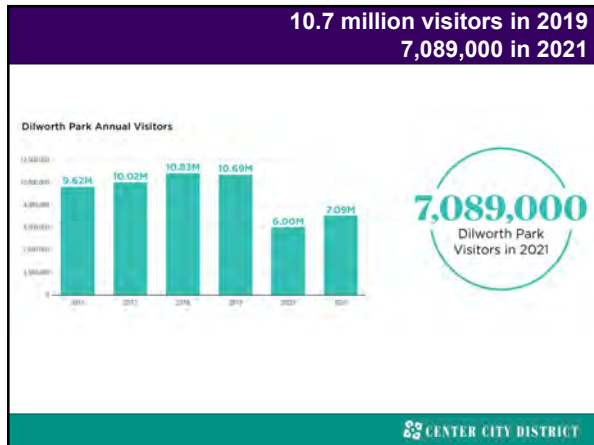
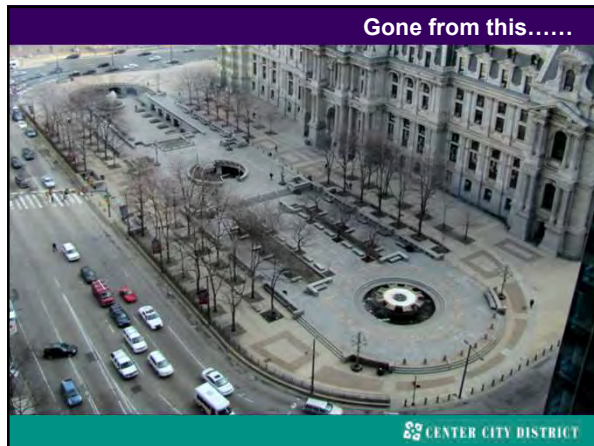
Early summer roller rink



Programed through fall and winter







**Biggest losses: Leisure, hospitality & restaurants down 14%
Education down 5.1%; Health Care -1.9% Office sector +1.7%**

CITY OF PHILADELPHIA EMPLOYMENT BY INDUSTRY (IN THOUSANDS)

	FEB 2020	APR 2020	% CHANGE FEB 2020 APR 2020	MAR 2020	APR 2020 (UNEMPLOYMENT)	% CHANGE MAR 2020 APR 2020	FEB 2020	APR 2020	% CHANGE FEB 2020 APR 2020
All Industries	754.3	628.6	-17%	718.0	728.0	-0.2%	80.4%	80.4%	0%
Adding, Logging and Construction	11.4	6.7	-42%	7.0	7.0	0%	1.5%	1.5%	0%
Manufacturing	18.1	14.5	-20%	18.0	18.0	0%	2.4%	2.4%	0%
Wholesale Trade	14.0	12.4	-12%	13.1	13.1	0%	1.8%	1.8%	0%
Retail Trade	48.4	34.3	-29%	41.9	41.9	0%	6.4%	6.4%	0%
Transportation, Warehousing and Utilities	30.4	25.4	-16%	28.2	28.2	0%	4.0%	4.0%	0%
Information	14.2	13.0	-9%	13.0	13.0	0%	1.8%	1.8%	0%
Financial Activities	43.0	43.0	0%	43.0	43.0	0%	5.7%	5.7%	0%
Professional and Business Services	104.4	94.0	-10%	105.1	105.1	0%	13.8%	13.8%	0%
Education and Health Services	41.7	39.7	-5%	41.1	41.1	0%	5.5%	5.5%	0%
Educational Services	26.1	22.4	-14%	23.1	23.1	0%	3.4%	3.4%	0%
Health Care and Social Assistance	15.6	17.3	11%	18.0	18.0	0%	2.1%	2.1%	0%
Arts, Entertainment and Recreation	10.7	9.4	-12%	9.4	9.4	0%	1.4%	1.4%	0%
Accommodation and Food Services	51.9	35.0	-33%	46.0	46.0	0%	6.8%	6.8%	0%
Other Services	29.6	19.1	-35%	25.1	25.1	0%	3.9%	3.9%	0%
Government	107.1	108.4	1%	107.4	107.4	0%	14.2%	14.2%	0%
Federal Government	31.0	31.1	0%	31.0	31.0	0%	4.1%	4.1%	0%
State Government	10.7	10.4	-3%	10.7	10.7	0%	1.4%	1.4%	0%
Local Government	65.4	66.9	2%	65.7	65.7	0%	8.7%	8.7%	0%

Not Houston with strong dependence on oil



**Neither Orlando nor Las Vegas
Single industry towns: more diversified base**



**We kept 148 on-street staff, working 3-shifts, 7 days/week
Come from every neighborhood in Philadelphia**



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



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



**Starting November 2020 deployed 15 bike officers,
8 defined beats 7 days/week; 11 am to 7pm**

CENTER CITY DISTRICT

**April 2022: Added 3 pm to 11pm shift; Tuesday-Saturday
6 officers, 1 supervisor: fundraised to expand evening patrol**

CCD Bike Patrol Zones
3pm-11pm
Tues-Sat

CENTER CITY DISTRICT

Total: 21 person bike patrol; 7 days/week

CENTER CITY DISTRICT

**September: increase to 15/day + 10/night = 25
3 pm to 11pm shift; 7 days/week**

CENTER CITY DISTRICT

**Closely coordinated with additional police deployment:
Bikes, new foot patrol, return to focused beats
Return to community policing**

CENTER CITY DISTRICT

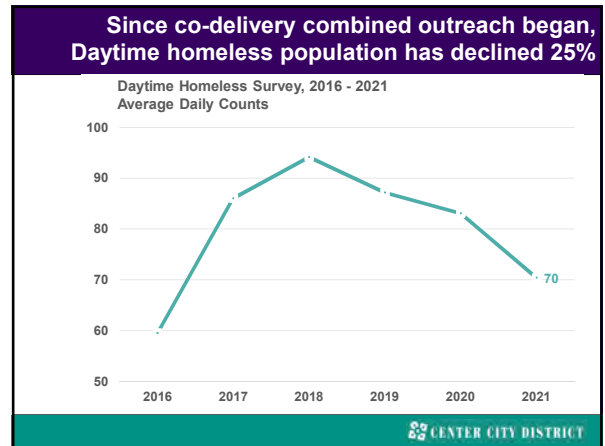
Since 2018: Deployed Ambassadors of Hope
CCD funds: CSRs, Project Home & CIT trained police
CCD provides dedicated van to transport to shelter

CENTER CITY DISTRICT

Co-service delivery model
 In 4 years: 525 individuals connected with shelter, services & housing
 140 successful placements in 2021



CENTER CITY DISTRICT



Adding a third team, September 1, 2022
 Tuesday to Saturday



CENTER CITY DISTRICT

Developer confidence remains strong in Center City
 Two new condo towers topped out



CENTER CITY DISTRICT

Jefferson moving forward: 1100 block of Chestnut



CENTER CITY DISTRICT

Jefferson's new Specialty Care Pavilion



CENTER CITY DISTRICT

New office building for Morgan Lewis law firm
2222 Market Street



CENTER CITY DISTRICT

External cladding almost done



CENTER CITY DISTRICT

New residential along the Schuylkill River



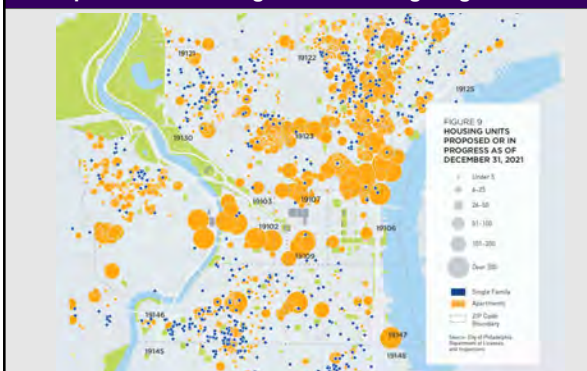
CENTER CITY DISTRICT

New projects continue to be announced



CENTER CITY DISTRICT

An explosion of housing in surrounding neighborhoods



CENTER CITY DISTRICT

Significant new investment in University City



CENTER CITY DISTRICT

Drexel & Penn focusing on start-ups & new industries spawned by research & technological innovations ambitious plans to come east



CENTER CITY DISTRICT

Spawning a burgeoning life-sciences industry



CENTER CITY DISTRICT

Wexford building in proximity to universities, hospitals & researchers



CENTER CITY DISTRICT

Brandywine Schuylkill Yards mixed-use: Lab & apartments



CENTER CITY DISTRICT

3025 JFK Boulevard

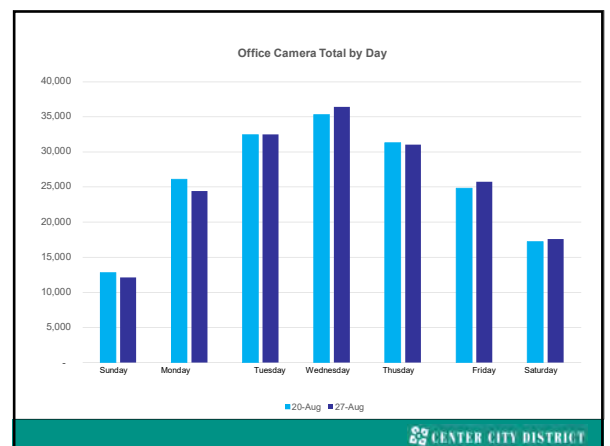
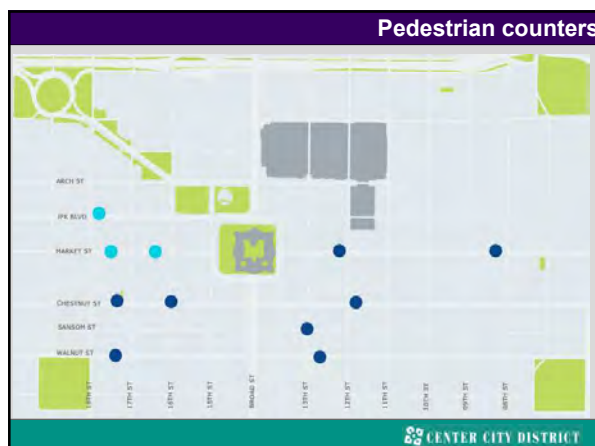
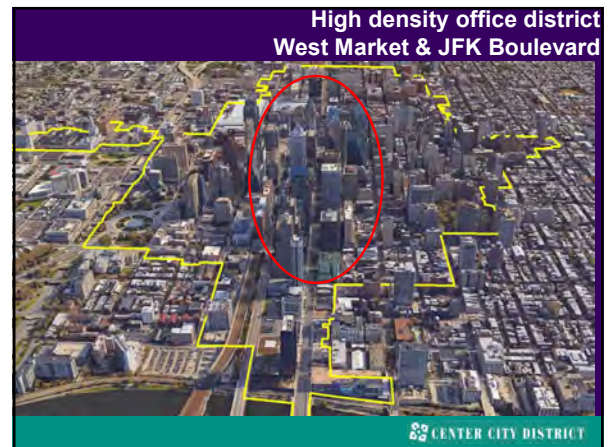
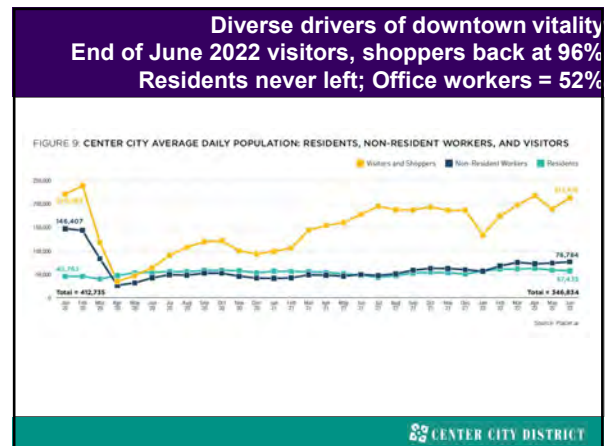
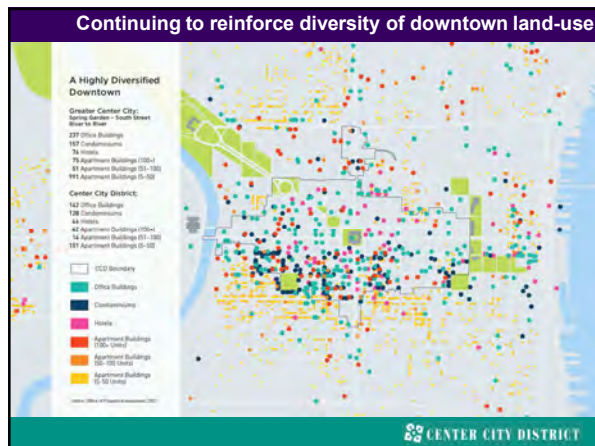


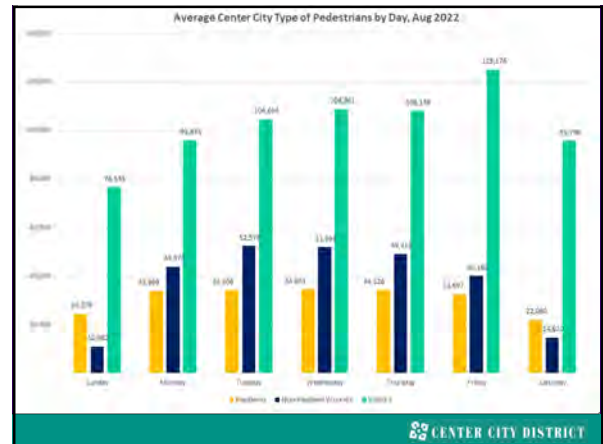
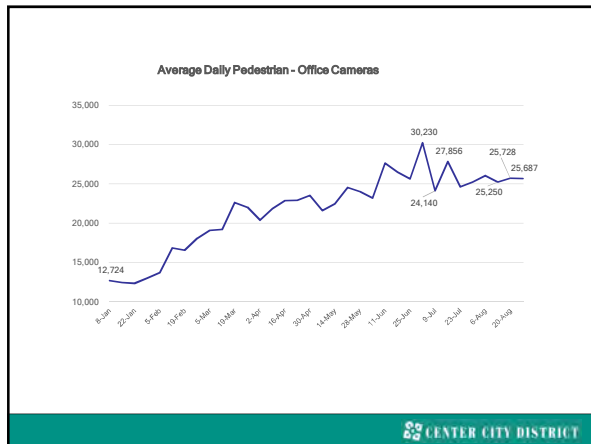
CENTER CITY DISTRICT

New Tishman Speyer development 2300 Market



CENTER CITY DISTRICT



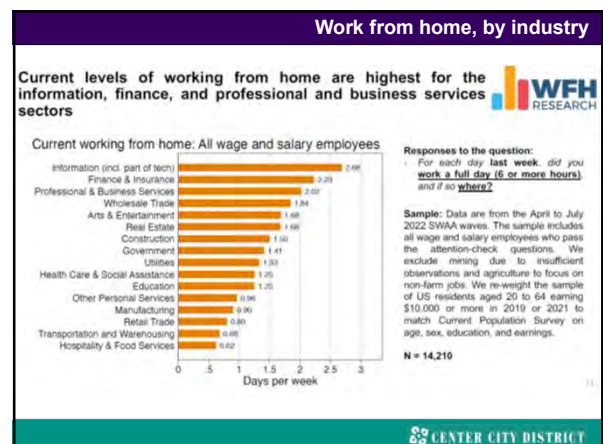


What other jobs are lost if office workers don't return?
Those who don't have the option to work remotely

Every 500,000 square feet of occupied office space:

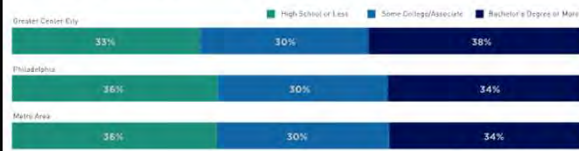
- Provides 3,333 office jobs, 5 building engineering, 18 cleaning and 12 security positions.
- Supports 11,000 hotel rooms filled with business travelers
- Generates \$2.8 million in retail demand
- Hair & nail salons, shoemakers dry-cleaners, delis & restaurants

CENTER CITY DISTRICT



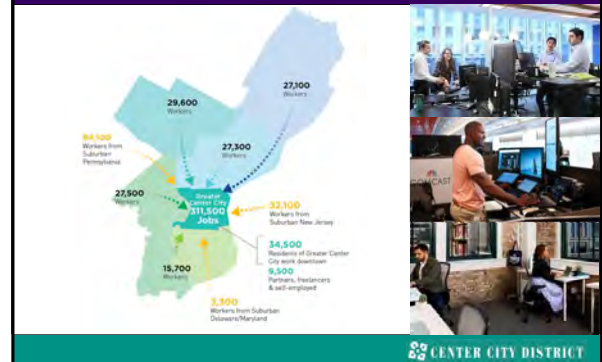
63% downtown jobs require less than college degree 33% require only a high school diploma

PERCENT OF JOBS BY LEVEL OF EDUCATION, WORKERS 29 AND OLDER



CENTER CITY DISTRICT

25% of working residents in each neighborhood work downtown There is a broader economic impact of not coming back On the economic ecosystem & vitality of downtown

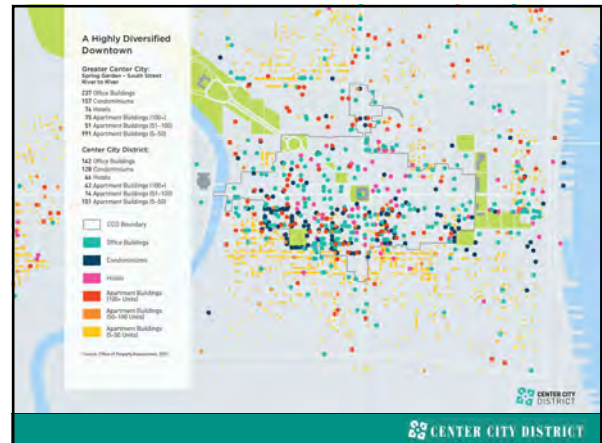


CENTER CITY DISTRICT

But the days of 9-5 downtowns are long gone Diversification & flexibility are keys to future success

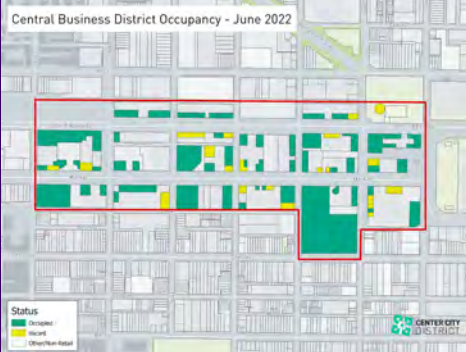


CENTER CITY DISTRICT



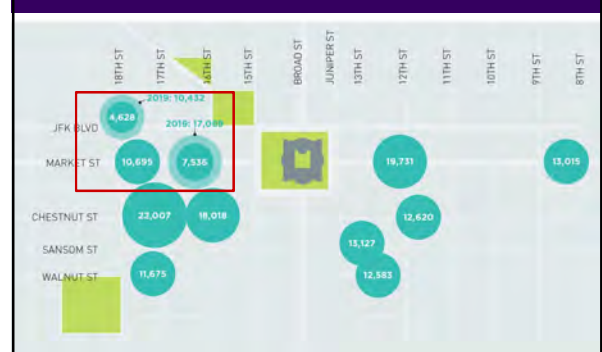
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Need to rethink the retail in the office district?



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Pedestrian sensors in the office district



CENTER CITY DISTRICT

