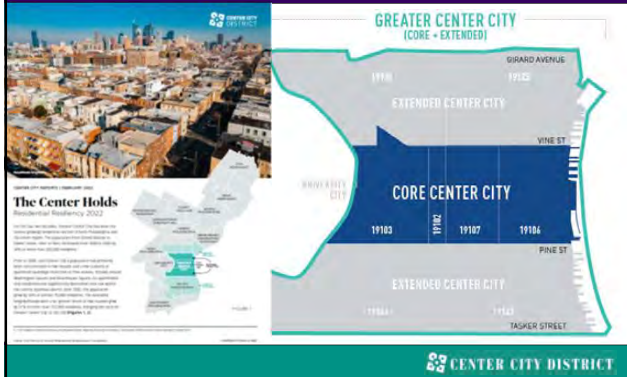


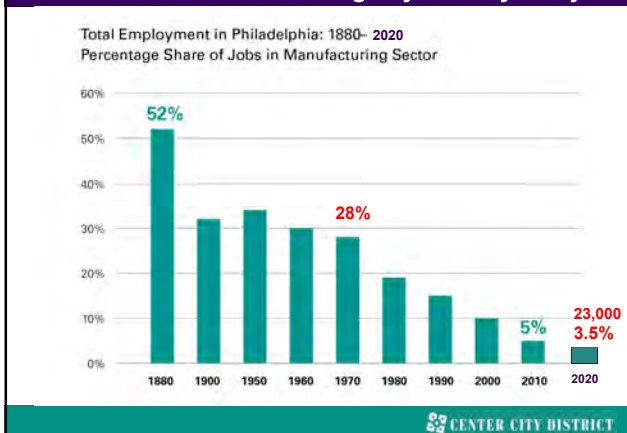
Downtown housing: Philadelphia case study



Philadelphia: downtown residential revival A long time in the making



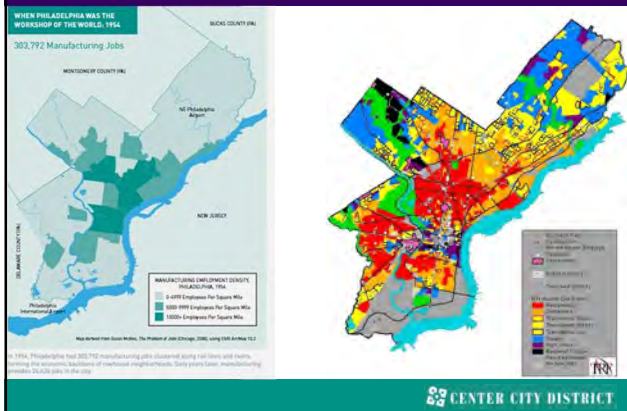
A former manufacturing city steadily lost jobs



1970s a period of rapid de-industrialization



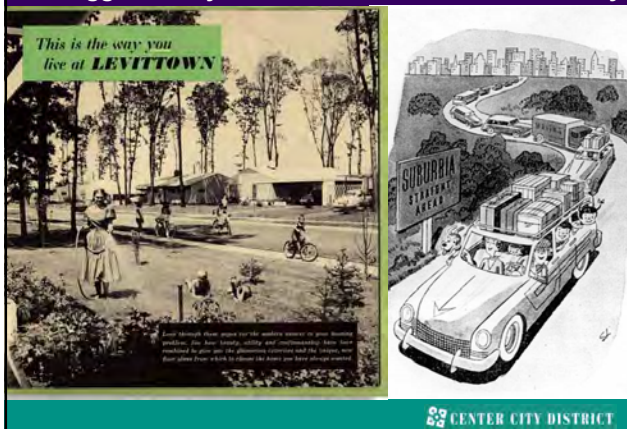
Old manufacturing areas = blighted areas in 2000



Post WW 2: mass production of housing: Levittown



Aggressively marketed as alternative to the city



Significant new supply across the region



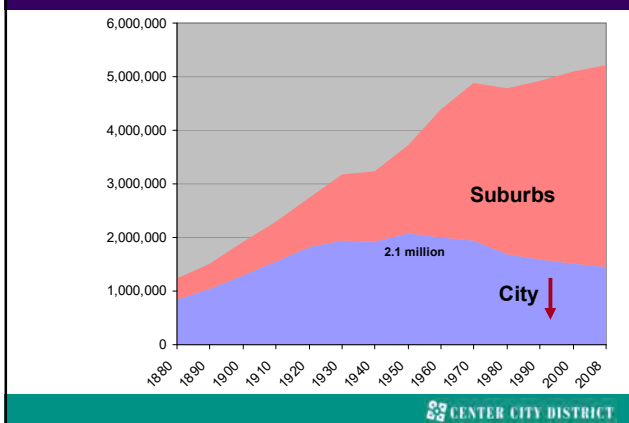
CENTER CITY DISTRICT

Job Loss + Suburbanization + Redlining
= housing abandonment



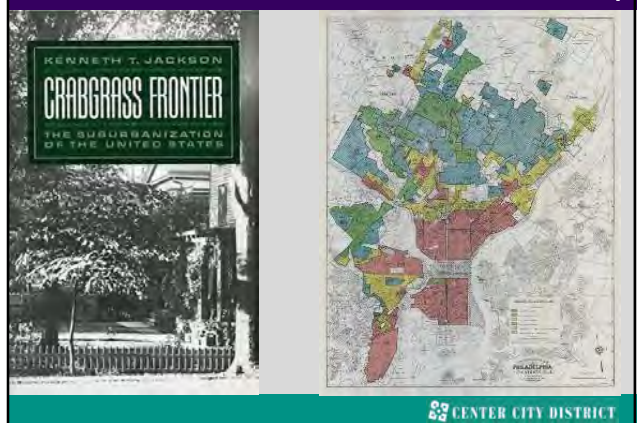
CENTER CITY DISTRICT

Postwar suburbanization



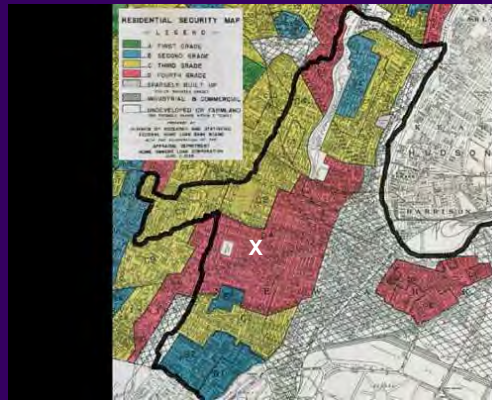
CENTER CITY DISTRICT

1932 HOLC Map



CENTER CITY DISTRICT

Newark, New Jersey



CENTER CITY DISTRICT

Even in 1950s strong residential cluster around Rittenhouse Square



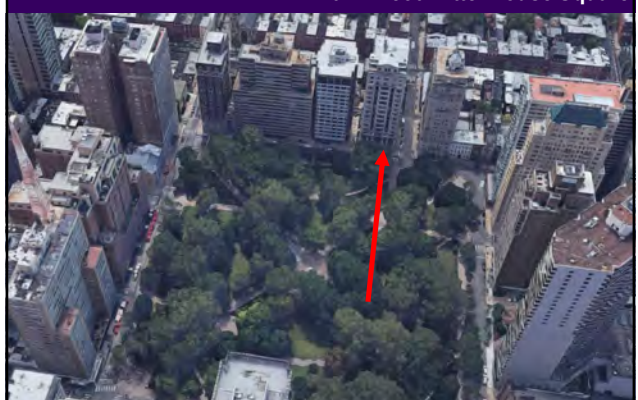
CENTER CITY DISTRICT

1921: 1830 Rittenhouse Square



CENTER CITY DISTRICT

2022: 1830 Rittenhouse Square



CENTER CITY DISTRICT

1921: 1830 Rittenhouse Square



 CENTER CITY DISTRICT

East side of Center City was in decline



 CENTER CITY DISTRICT

Creation of national park on east side started 1940s



 CENTER CITY DISTRICT

500 block of Chestnut Street

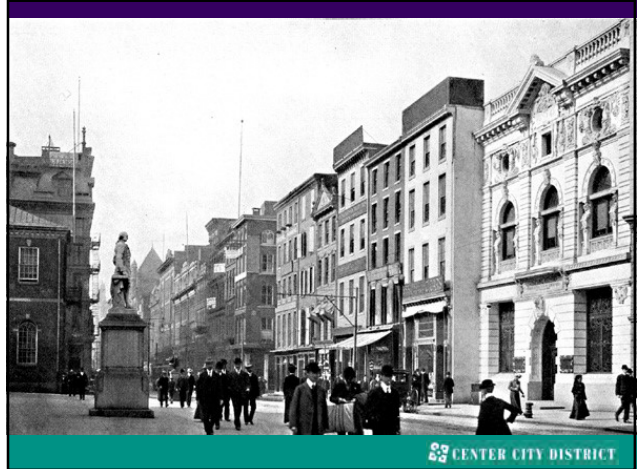


 CENTER CITY DISTRICT

Early 19th century & Victorian architecture



CENTER CITY DISTRICT



CENTER CITY DISTRICT



CENTER CITY DISTRICT

Historic buildings we would not demolish today



CENTER CITY DISTRICT

1950s: center of garment industry in Philadelphia

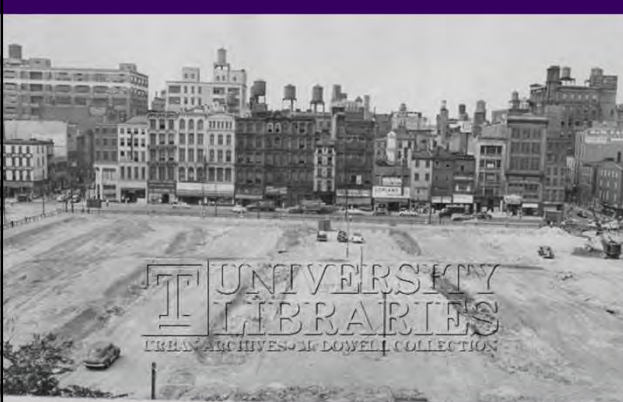


CENTER CITY DISTRICT



CENTER CITY DISTRICT

Demolished as obsolete



CENTER CITY DISTRICT

Relocated to Callowhill Corridor



CENTER CITY DISTRICT

Low density, large lots



CENTER CITY DISTRICT



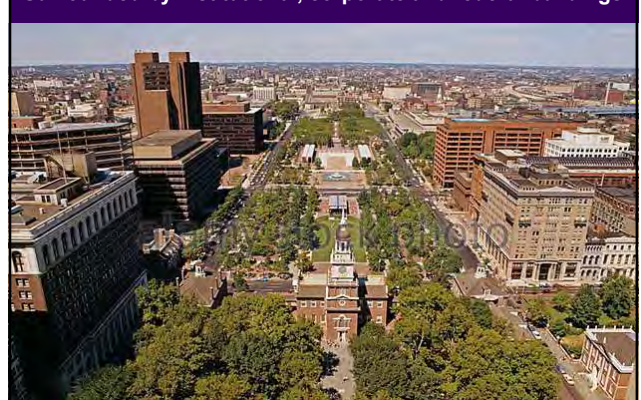
CENTER CITY DISTRICT

All very symmetrical, but not well used

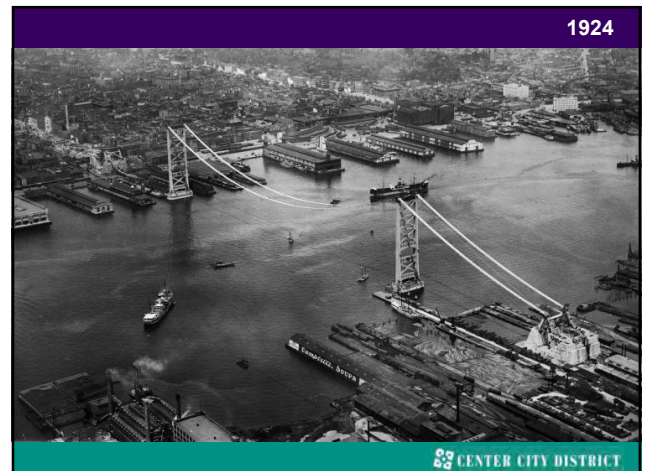


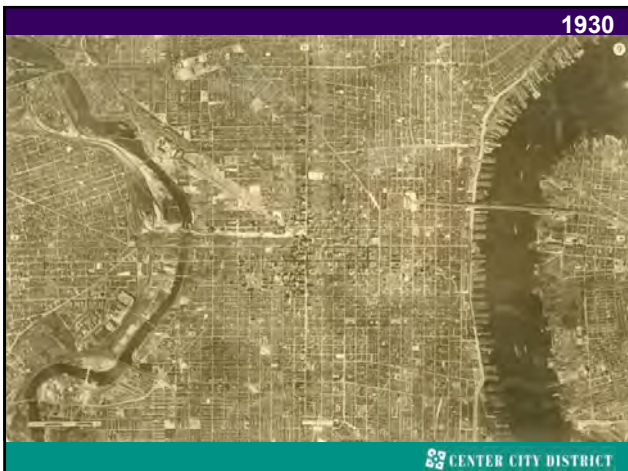
CENTER CITY DISTRICT

Surrounded by institutional, corporate and federal buildings



CENTER CITY DISTRICT





Ships were unloaded manually, 1962



 CENTER CITY DISTRICT

Labor intensive jobs



 CENTER CITY DISTRICT

Labor intensive industry: Longshoremen



 CENTER CITY DISTRICT

**Changes in transportation technology,
growth of sunbelt & global economy**



 CENTER CITY DISTRICT

Mechanization of moving goods and products



CENTER CITY DISTRICT

From container ship



CENTER CITY DISTRICT

To trains.....

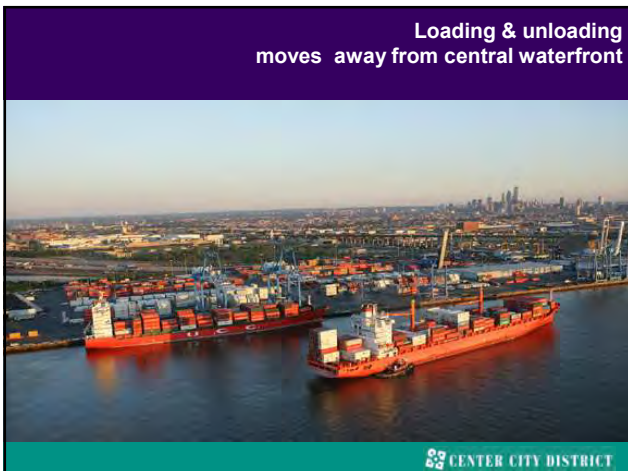


CENTER CITY DISTRICT

Or trucks; significant reduction in need for labor
Huge gains in efficiency



CENTER CITY DISTRICT



Similar process in San Francisco
Move to Oakland



CENTER CITY DISTRICT

Port of Oakland California



CENTER CITY DISTRICT

Oakland



CENTER CITY DISTRICT

West 57th Street, Pier 97 in the 1960s
Move across to New Jersey



CENTER CITY DISTRICT

Port Elizabeth/Newark Marine Terminal



 CENTER CITY DISTRICT

Port Elizabeth/Newark Marine Terminal



 CENTER CITY DISTRICT

**1948: Manhattan's downtown with a working port;
Manufacturing = 33% of the city's jobs; today 4.5%**



 CENTER CITY DISTRICT

Lower Manhattan today



 CENTER CITY DISTRICT

1950s: working waterfront was in decline



CENTER CITY DISTRICT

Finger piers become obsolete



CENTER CITY DISTRICT

Left to deteriorate



CENTER CITY DISTRICT

Economic base of residential neighborhoods eroded



CENTER CITY DISTRICT

Old Food Distribution Center on Dock Street



Location today



1908: from ship to shore to local stores



Waterfront in the mid 1920s



Waterfront in the mid 1920s



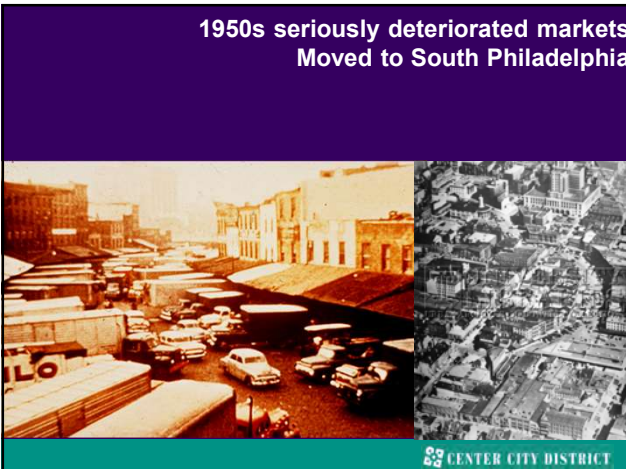
CENTER CITY DISTRICT

Ever more congested with cars



CENTER CITY DISTRICT

1950s seriously deteriorated markets
Moved to South Philadelphia



CENTER CITY DISTRICT

Food Distribution Center



CENTER CITY DISTRICT

Location today



CENTER CITY DISTRICT

New residential under construction

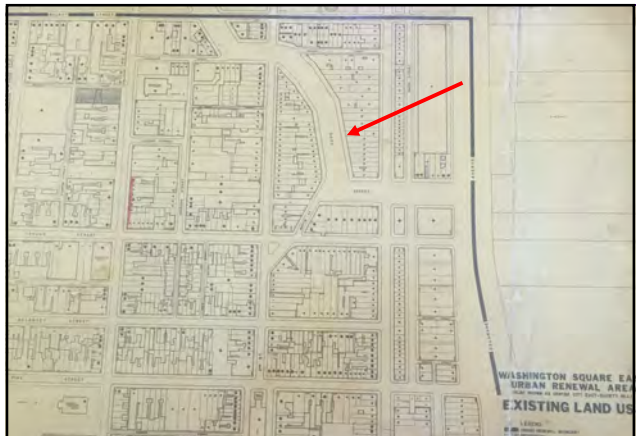


CENTER CITY DISTRICT

Persuaded federal government essential to renewal



CENTER CITY DISTRICT



CENTER CITY DISTRICT

Dilworth supervises demolition



CENTER CITY DISTRICT



CENTER CITY DISTRICT



OLD PHILADELPHIA
DEVELOPMENT
CORPORATION

FROM DREAMS TO REALITY

1958

CENTER CITY DISTRICT

Replaced by new construction to signal change



CENTER CITY DISTRICT



Very selective process of demolition & preservation



Preservation of only colonial & federal architecture
Industrial and Victorian was demolished
Creation of Society Hill



1956: 567 properties designated for preservation



Distinctive light fixtures & brick pavers



Creation of Delancey Park for children



CENTER CITY DISTRICT

Three bears park



CENTER CITY DISTRICT

Expansion of McCall Public School



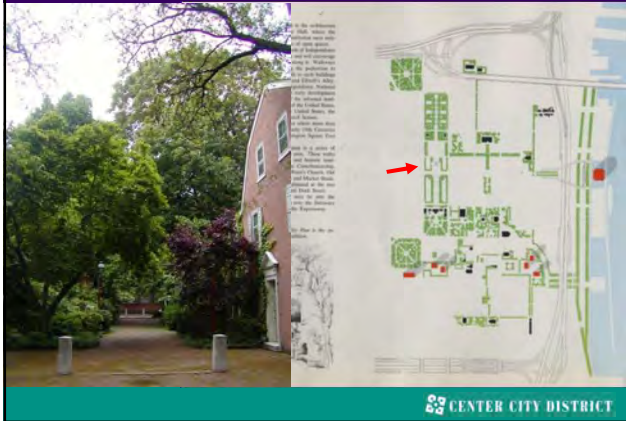
CENTER CITY DISTRICT

System of greenways



CENTER CITY DISTRICT

To link Society Hill to the National Historical Park



CENTER CITY DISTRICT

Small scale places



CENTER CITY DISTRICT

Major stimulus to downtown living



CENTER CITY DISTRICT

1963 boundaries of Center City quite distinct

Outside these boundaries: working class, lower income communities



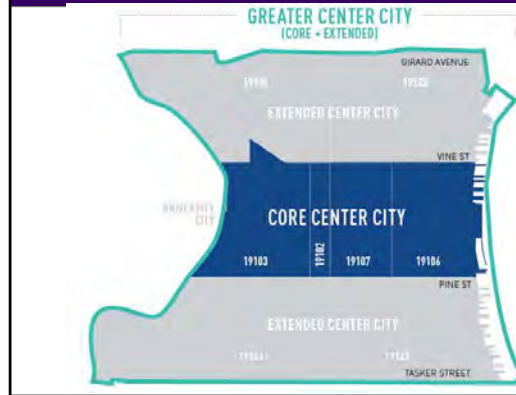
CENTER CITY DISTRICT

Framed by highways in the 1963 plan



CENTER CITY DISTRICT

Core Center City



CENTER CITY DISTRICT

Demolition of industrial era train tracks
Creation of modern new Office District



CENTER CITY DISTRICT

University City: a parallel process of transformation



CENTER CITY DISTRICT

Philadelphia holds 42% of all city jobs; University City = 11% 8% of city's land area, holds 53% of city's jobs


PHILADELPHIA EMPLOYMENT BY AREA

Area	Percentage of City Jobs
University City	11%
Center City	42%
Fairmount East	8%
Near North East	6%
Center City West	6%
North Philadelphia	6%
University City West	4%
In the City	4%
University City West	4%
University City West	4%
University City West	4%

Source: U.S. Census Bureau, Philadelphia, 2000. Data for University City and Center City are based on 2000 Census data.

CENTER CITY DISTRICT

Like large rock in pond, creation 20st century downtown produced transformational ripple effects




CENTER CITY DISTRICT

Proximity to employment gives value to neighborhoods
Gentrification is a by-product of economic transformation


An aerial photograph of a city, likely St. Louis, showing a wide river (the Mississippi River) flowing through the center. Several bridges cross the river, including the Eads Bridge and the Veterans Memorial Bridge. The city is densely packed with buildings and infrastructure, with a mix of older and newer structures. The riverbanks are lined with trees and some green spaces. The overall scene depicts a major urban center with a significant waterway.

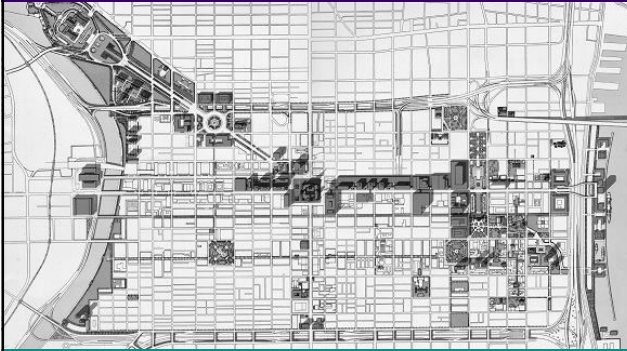
 CENTER CITY DISTRICT

Crosstown expressway



An aerial photograph of Denver, Colorado, showing the proposed Crosstown Expressway. The expressway is highlighted in a light blue color, running horizontally across the middle of the image. It starts on the left side, near the airport, and extends towards the right. The surrounding city grid is shown in a light gray color. The expressway is flanked by green spaces and some existing infrastructure. The image is framed by a dark blue border.

 CENTER CITY DISTRICT

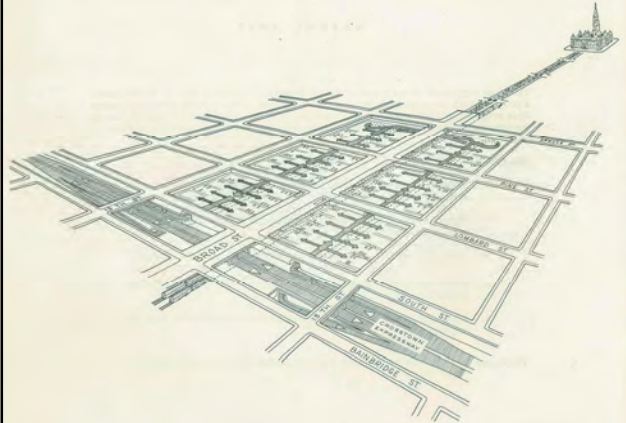
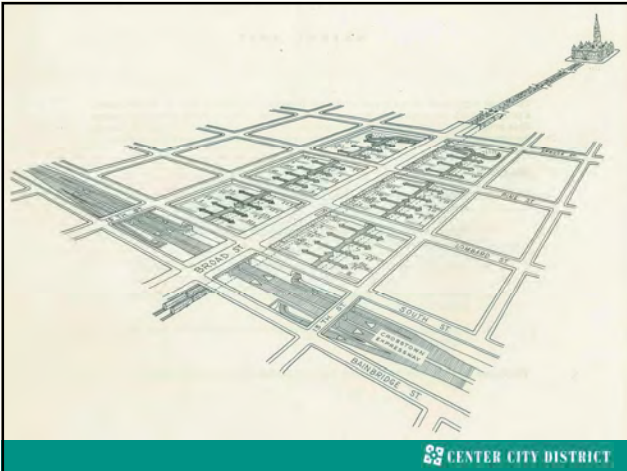


I-95 had been constructed



An aerial photograph of downtown Los Angeles, showing a dense urban grid. A red line is drawn across the middle of the image, indicating the location of I-95. The line starts near the river on the left and extends towards the right side of the frame. The surrounding area is filled with buildings, streets, and some green spaces.

 CENTER CITY DISTRICT



Typical condemnation letter

**COMMONWEALTH OF MASSACHUSETTS
DEPARTMENT OF HIGHWAYS**

STATE OF MASSACHUSETTS
Seal of the Commonwealth
JANUARY 1967

Telephone Number
Legislative Route 3000, Section 3-3
Telephone TRunk 5-47-11311
Class 676325

MAILING ADDRESS
Legislative Route 3000, Section 3-3
Telephone TRunk 5-47-11311
Class 676325

DATE OF MAILING
JAN 19 1967

TO: Mr. [Name]
[Address]
[City, State, Zip]

FROM: Mr. [Name]
[Address]
[City, State, Zip]

SUBJECT: [Subject]

THIS is to advise you that your Department of Highways has decided, on the basis of engineering, engineering and traffic studies, to build a highway in the vicinity of [Location] and to so doing find it necessary to acquire right of way from the above property.

At the first time notice will be necessary for Department staff engineers, local representatives and surveyors interested in the Department of Highways, to both, to request the property to that a proper determination of the value can be made.

Persons who find your property has been condemned, and yet are not yet provided to have from the premises. When your interest is so actually required, you will be notified by the right of way agent who will explain your rights in a letterhead memorandum and see my name.

Be Good you in advance for the Department we are sure you will give your property Department and the engineering Department the highest of the highest consideration.

Very truly yours,
[Signature]
[Name]
[Title]

cc: [Name]
[Address]
[City, State, Zip]



Dear Mr. and Mrs. Kubiak:

This is to inform you that your Department of Highways has decided, on the basis of comprehensive engineering and traffic studies, to build or improve the above highway, and in so doing finds it necessary to acquire right of way from the above property.

In the next few weeks it will be necessary for Department staff appraisers, local independent real estate brokers retained by the Department of Highways, or both, to inspect the property so that a proper determination of its value can be made.

Please note that your property has not been condemned, and you are not required to move from the premises. When your removal is eventually required, you will be visited by the right of way agent who will explain your rights to relocation assistance and moving costs.

We thank you in advance for the cooperation we are sure you will give your Highway Department and its employees throughout the making of this highway improvement.

CENTER CITY DISTRICT

Neighborhood opposition to demolition



CENTER CITY DISTRICT

Inter-racial alliances



CENTER CITY DISTRICT

Strong community opposition: striking of Crosstown



CENTER CITY DISTRICT

Downtown population grew slowly, but steadily 1980s



 CENTER CITY DISTRICT


Residential continuity to the south



 CENTER CITY DISTRICT

An easy walk into the business district

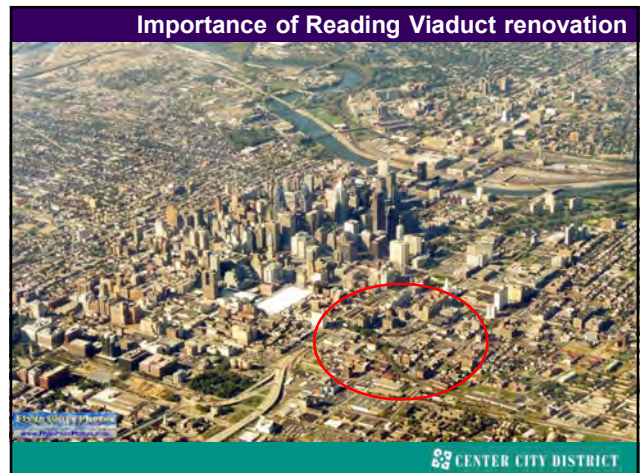
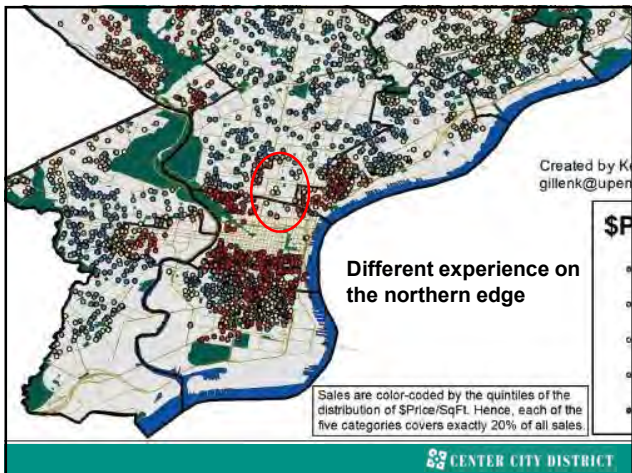
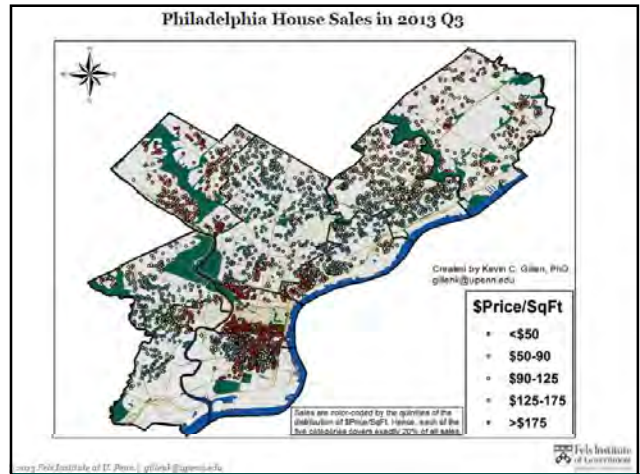


 CENTER CITY DISTRICT

Vine Street discontinuity on the northern side



 CENTER CITY DISTRICT



Reading Viaduct



I-95 to the east: 1968



Separated the city from the waterfront



Only giants can cross



CENTER CITY DISTRICT

Creating a challenge for waterfront development



CENTER CITY DISTRICT

1960s & 1970s a new office district



CENTER CITY DISTRICT

1980's office boom transformed skyline



CENTER CITY DISTRICT

But a recession & declining federal resources left
A degraded & squalid public environment:



CENTER CITY DISTRICT

1991: focus on the basics: cleaning



CENTER CITY DISTRICT

Public safety
Community Service Representatives



- 42 CSR's
- 4 Supervisors
- 7 days per week

CENTER CITY DISTRICT

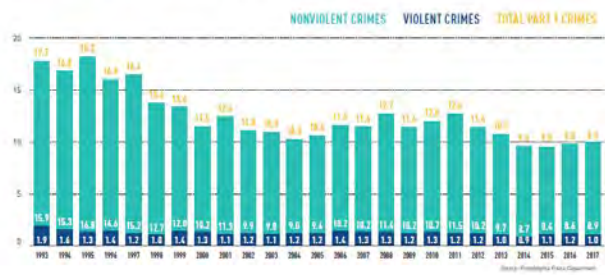
Partnership with the police



CENTER CITY DISTRICT

Since 1995 serious crimes cut in half
declined from 18.2 to 9.9/day
Even as population & activity increased downtown

PART 1 CRIMES PER DAY IN THE CENTER CITY DISTRICT, 1993-2017



CENTER CITY DISTRICT

Reversing polarity:
Downtown diversified in the 1990s



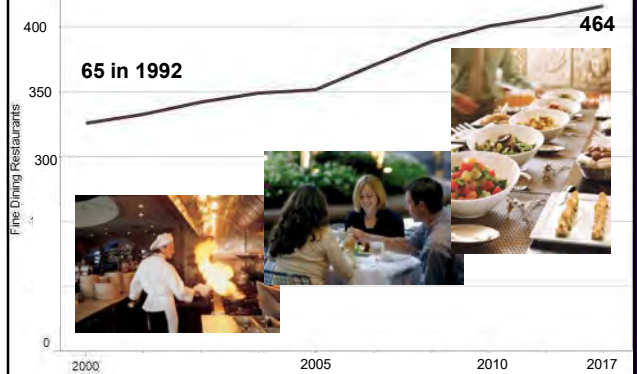
CENTER CITY DISTRICT

Added more amenities



CENTER CITY DISTRICT

Continuous growth in fine dining restaurants



CENTER CITY DISTRICT

Extensive retail, dining, cultural & educational offerings
within walking distance



CENTER CITY DISTRICT

Easy access to 5 hospitals
providing world-renowned medical care



CENTER CITY DISTRICT

It became a more attractive place to live



CENTER CITY DISTRICT

1953: the demolition of Pennsylvania Railroad



CENTER CITY DISTRICT

Penn Center

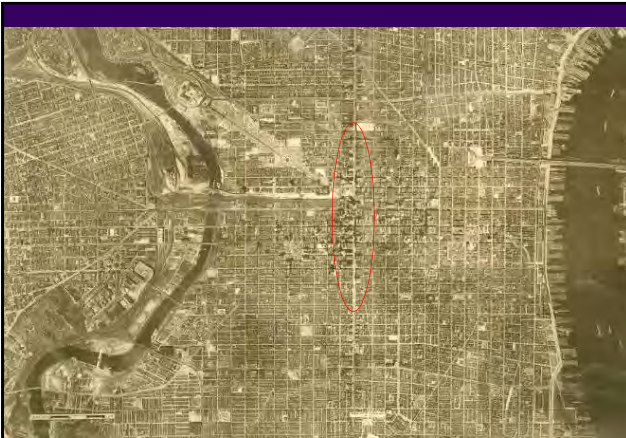


CENTER CITY DISTRICT

1950s & 1960s renewal adds Modernist office product



CENTER CITY DISTRICT



CENTER CITY DISTRICT

South Broad Street inventory: 40% vacant in 1990



CENTER CITY DISTRICT

Inventory from 1890s to 1920 becomes outmoded:
For prime office use: New York & Baltimore



 CENTER CITY DISTRICT

Minneapolis: migration from B & C to A buildings



 CENTER CITY DISTRICT

Dallas & Minneapolis



 CENTER CITY DISTRICT

Older warehouse & industrial buildings



 CENTER CITY DISTRICT

Cleveland: great ceiling heights + windows



Cleveland, & Dallas



CENTER CITY DISTRICT

St. Louis



CENTER CITY DISTRICT

Los Angeles Broadway: 1920s



CENTER CITY DISTRICT

Bunker Hill drew commercial life out of old downtown
& towards the freeway



CENTER CITY DISTRICT

Broadway moves down market, decline, deteriorate



CENTER CITY DISTRICT

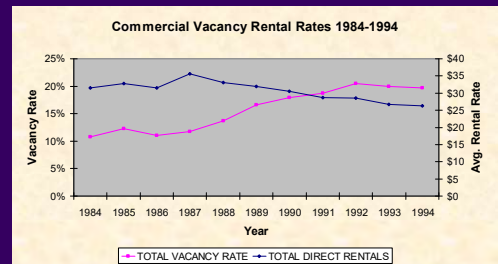
Bradbury Building
These are the buildings in every city that
get renovated for housing



CENTER CITY DISTRICT

Wall Street: 1995

21 million SF vacant office space
20% commercial vacancy rate
Over-reliance on FIRE sector
Quiet after dark



CENTER CITY DISTRICT

1995: empty after 5:00 pm & on weekends



CENTER CITY DISTRICT

The Downtown Alliance

Formed in 1995

Mission: To create and promote a safe, clean, live-work, totally wired community, which showcases the nation's most historic neighborhood and serves as the financial capital of the world for the 21st century.

Method: Strengthen and Diversify the core commercial sector

CENTER CITY DISTRICT



Commercial
Residential
Institutional
Hotel

What this Means for Wall Street - 1995



Commercial
Residential
Institutional
Hotel
Hotel/Condo

What this Means for Wall Street - 2010





1996: 4.5 million sf. Vacant Class "C" office space Within core of business district

CENTER CITY DEVELOPMENT

TURNING ON THE LIGHTS UPSTAIRS
A Guide for Converting the Upper Floors of Older Commercial Buildings to Residential Use

Prepared by:
Craig Rabin & Associates
40 South 10th Street
Philadelphia, PA 19106
www.craig-rabin.com
Phone: 215-922-1000

© 2007
Robert E. Lee Housing
and Urban Renewal
Philadelphia, PA 19107

- Retained architect & developer to evaluate buildings
- Survey to determine best buildings; floor layout, window size & exposure
- Detailed economic analysis of 10 buildings: evaluation for code compliance, cost-estimate, pro-formas.

CENTER CITY DISTRICT

10 year residential tax abatement Approved 1997

- Extraordinary costs of converting from vacant office or industrial to residential use
- 10 year abatement on improvements
- Available city wide

CENTER CITY DISTRICT



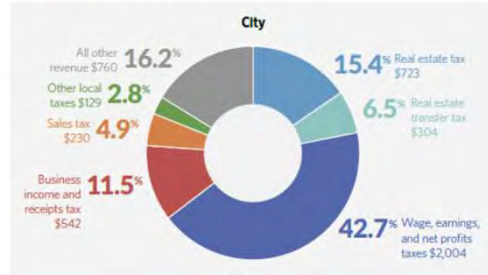
**54.2% Municipal tax revenue from wage & business taxes
15.4% comes from Real Estate tax**

Figure 1

Sources of General Fund Revenue for the City and School District of Philadelphia

Fiscal 2021, in millions of dollars

**45% of RE tax goes to City;
55% to schools**



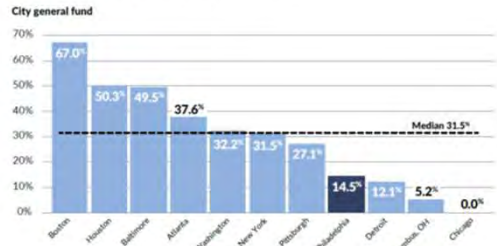
CENTER CITY DISTRICT

Very low reliance on RE taxes

Figure 4

City Government's Comparative Property Tax Reliance, Philadelphia and 10 Other Cities, 2020

Property taxes as a percentage of revenue



CENTER CITY DISTRICT

Case study of one of first conversions:



CENTER CITY DISTRICT

**Case study of one of first conversions:
Vacant industrial building**



Vacant building paying \$25,651 in RE taxes
Blighting influence for over a decade

\$17.2 million spent to create 162 apartments.
Project continued to pay \$25,651 in RE taxes on unimproved value; City forgoes \$530,000 in RE taxes on improvements for 10 years.

- Project created 250 construction jobs & generated \$514,000 in city taxes during construction
- Project created 10 permanent jobs which generate \$16,000 per year in new wage taxes.

40% of tenants were new to city & their new spending in town + new wage taxes generate \$980,000 per year in new municipal taxes

CENTER CITY DISTRICT

10 year residential tax abatement

Value of improvement abated

Taxes on unimproved value continue to be paid

CENTER CITY DISTRICT

1997 Residential Preferences Survey Of downtown office workers Of those who would consider making move to Center City:



- 79% were between the age of 21 to 49 years old
- 65% held a professional position
- 43% attended graduate school or more
- 32% had a household income of \$100,000 or more

CENTER CITY DISTRICT

1997 Residential Preferences Survey



- 63% of employees commute 30 minutes or more to work each day
- 20% of employees who do not live in Center City would consider living in Center City in the future



- 82% were attracted by the ability to **walk to work**
- 74% were attracted by the proximity to **arts, entertainment & restaurants**

CENTER CITY DISTRICT

But a look at the real estate pages in 1997.....



The Waterford

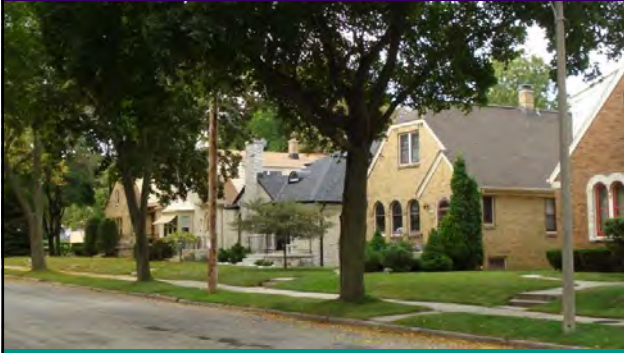


The Columbia



CENTER CITY DISTRICT

Heavily marketed by developers building at scale
Clean, tranquil & green



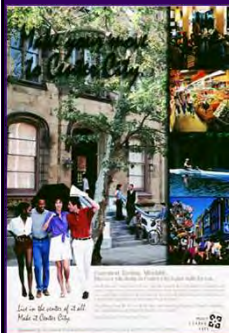
CENTER CITY DISTRICT

Great place to raise kids



CENTER CITY DISTRICT

Promoting the opportunity



Urban developers not carrying out development at the scale of suburban developers.

- *Make Your Move to Center City* Ad Campaign
- Placed in newspapers and magazines in 1997
- Limited run/conversation with brokers.

CENTER CITY DISTRICT

Targeted to different audiences



CENTER CITY DISTRICT

Promoting downtown living



Living in the Center of Everything

- Description of neighborhoods
 - List of downtown amenities
 - List of neighborhood services
- 50,000** brochures distributed to real estate brokers, downtown employees and students

CENTER CITY DISTRICT

The passage of the 10-year tax abatement in 1997:
triggered significant increase in housing production
Tapped into deeper trends



CENTER CITY DISTRICT

CCDC

Built on a long tradition of downtown living



CENTER CITY DISTRICT

Built on improved downtown amenities



CENTER CITY DISTRICT

2006: Why move to Center City? *Convenience*



Please rank the following factors in your decision to move to this location.

(1= extremely important, 4= not important)

Convenience to shopping/dining/entertainment	1.54
Neighborhood safety	1.61
Price of unit	1.71
Proximity to arts and cultural institutions	1.90
Proximity to place of employment	1.90
Building safety	1.92
Access to public transit	2.03
Access to parks and recreation	2.29
Diversity of neighborhood	2.42
Building amenities and services	2.45
Proximity to family and friends	2.46
Availability of convenient parking	2.50
Access to regional highways	2.54
Living in a historic building	3.07
Living in a newly constructed unit	3.20
Benefits from the 10-year tax abatement	3.31

 CENTER CITY DISTRICT

Spring 2007: Survey of 62 condo & rental buildings in CCD 500 responses



40%: moved in from outside the city

73% work downtown,
16% work in University City

35% hold jobs in the office sector
20% work in education & health services;
24% listed themselves as "retired."

50% walk to work
28% take public transportation.

 CENTER CITY DISTRICT

Between 1998 & 2021, 10-year abatement enabled
180 buildings to be converted to residential/hotel use
9 million sf of office/industrial space



 CENTER CITY DISTRICT

Expanded in 2000 to include all new construction



 CENTER CITY DISTRICT

Greater Center City demographics

Ages **20 to 34** constitute **44%** of the core Center City population, compared to **38%** in extended Center City and **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.



Significant volume of returning empty nesters & they drove up housing prices



Renters are younger Younger home-buyers are moving outward



Queen Village



Northern Liberties



CENTER CITY DISTRICT

Fairmount



CENTER CITY DISTRICT

Passyunk Avenue



CENTER CITY DISTRICT

Southwest Center City



CENTER CITY DISTRICT

Greater Center City: Girard Avenue to Tasker St



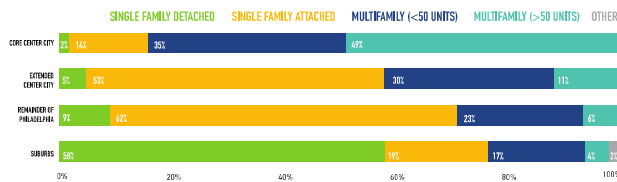
Broad range of housing types appeal to people at all stages of their lives, strengthening Center City's ability to retain residents long-term as their needs change



Diversity of housing stock

While 77% suburban housing units are single-family, downtown offers historic or new high-rise apartments, condos, colonial, federal & late 19th century rowhouses, brownstones & trinities, newly-constructed townhouses, converted lofts & repurposed office buildings.

FIGURE 16: HOUSING UNITS BY TYPE



Vulnerable populations

Lower income renters

Homeowners on fixed incomes: seniors

Working class homeowners

Rising tax assessments
Cultural/ethnic/racial change

Protections for lower income homeowners

Longtime Owner-Occupants Program. Established in 2014, if a home's value increases by over 300 percent during the course of a single tax year, the owner cannot be taxed on the value above that 300 percent mark. For example, if a home's value shoots up from \$100,000 to \$340,000, the homeowner won't have to pay taxes on the \$40,000.

Owner Occupied Payment Agreement. For those who have fallen behind on their property taxes, the Owner-Occupied Payment Agreement (OOPA) gives eligible homeowners an opportunity to enter into a payment plan. Depending on household income, there are different tiers of payment: 10 percent, 8 percent, 5 percent and, thanks to a reform enacted by the city this year, nothing at all. The non-payment agreement is available to households of four earning less than \$12,000, or about \$27,000 for seniors and the permanently disabled. At the end of the payment plan, interest on the amount owed is waived.

Homestead Exemption. available to almost all homeowner-occupants in Philadelphia, regardless of age, location, or income. The exemption shaves \$40,000 off the assessed value of a house for local real estate tax purposes. If a home is worth \$150,000, the owner pays local property taxes on just \$110,000.

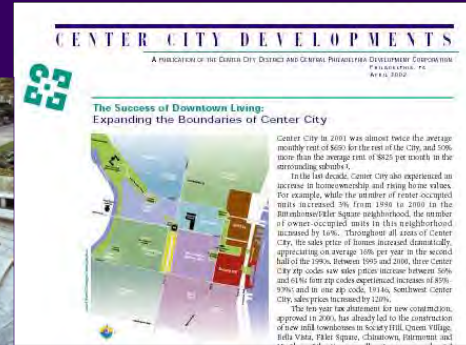
Low-Income Senior Citizen Tax Freeze. Program allows the city to freeze property-tax bill of homeowners over the age of 65 (or widows aged 50 and above whose spouse was 65 or older). Whatever amount they have been paying, they will continue to pay; if the tax bill goes down, the lower amount can be locked in. The program is open only to those who earn below \$23,500 a year, or \$31,500 or less for a married couple.

Real Estate Tax Deferral. This program allows an eligible homeowner to put off paying any year-over-year property-tax increase of 15 percent or more until the house is sold. That deferred payment becomes a lien on the house that incurs an interest rate of 2 percent.

Property Tax/Rent Rebate Program. This state-run program, paid for by the Pennsylvania Lottery, offers tiered tax or rent relief to those 65 & older, people 50 and older whose eligible spouses have died, and those with disabilities who are 18 or older. There are four income tiers, the highest being a \$250 rebate for those making between \$18,001 and \$35,000. The lowest is for those earning below \$8,000 a year, who can get back \$650. For renters, there are only two tiers: Those who earn less than \$8,000 get \$650 back; those who earn between \$8,000 and \$15,000 get \$500 back.

 CENTER CITY DISTRICT

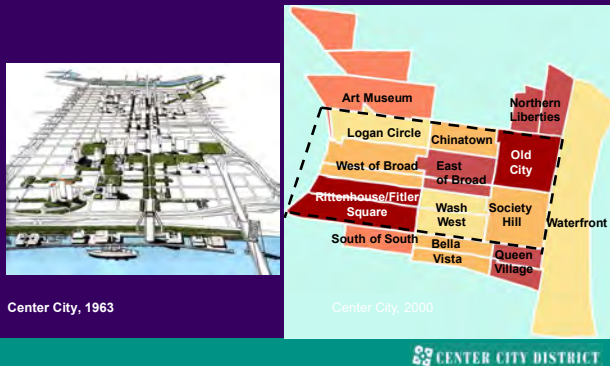
Defining new boundaries for Center City 2002: In depth look at 2000 census



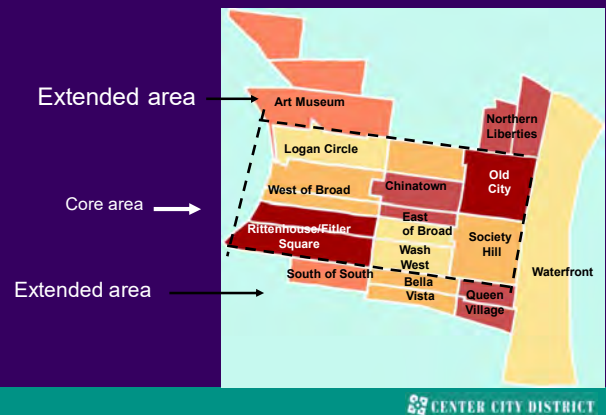
 CENTER CITY DISTRICT

An extended definition of downtown

(a) Marketed as Center City (b) appreciation (c) household size



Expanding boundaries of Center City



Population growth by decade: 1970-2000

Area	Neighborhood	Year				Percent Change			
		1970	1980	1990	2000	70-80	80-90	90-00	70-00
Core	Chinatown	1,133	1,150	1,403	1,362	2%	22%	-3%	20%
	East of Broad	430	740	1,404	2,441	72%	90%	74%	468%
	Logan Circle	3,974	2,160	2,427	2,570	-46%	12%	6%	-35%
	Old City	225	656	2,073	2,650	192%	216%	28%	1078%
	Rittenhouse / Fitler	15,305	16,429	16,089	16,609	7%	-2%	3%	9%
	Society Hill	4,841	5,213	5,715	5,808	8%	10%	2%	20%
	Wash West	9,855	10,223	9,828	10,894	4%	-4%	11%	11%
	West of Broad	7,702	6,981	6,275	6,877	-9%	-10%	10%	-11%
Core		43,465	43,552	45,214	49,211	0%	4%	9%	13%
Extended Area	Art Museum	18,300	15,618	14,895	15,700	-15%	-5%	5%	-14%
	Bella Vista	8,338	6,137	5,784	4,577	-26%	-6%	-21%	-45%
	Northern Liberties	905	359	593	789	-60%	65%	33%	-13%
	Queen Village	4,503	3,986	4,436	4,396	-11%	11%	-1%	-2%
	South of South	5,053	3,469	3,763	3,585	-31%	8%	-5%	-29%
	Waterfront			400	644			61%	
Extended Area		37,099	29,569	29,871	29,691	-20%	1%	-1%	-20%
Center City		80,564	73,121	75,085	78,902	-9%	3%	5%	-2%

CENTER CITY DISTRICT

Household growth by decade, 1970-2000

Area	Neighborhood	Year				Percent Change			
		1970	1980	1990	2000	70-80	80-90	90-00	70-00
Core	Chinatown	418	410	397	459	-2%	-3%	16%	10%
	East of Broad	283	567	872	801	100%	54%	-8%	183%
	Logan Circle	1,662	1,264	1,365	1,239	-24%	8%	-9%	-25%
	Old City	103	373	1,368	1,748	263%	267%	28%	1601%
	Rittenhouse / Fitler	9,064	10,780	10,420	11,088	19%	-3%	6%	22%
	Society Hill	2,481	2,875	3,401	3,635	16%	18%	7%	47%
	Wash West	6,074	6,551	6,635	7,052	8%	1%	6%	16%
	West of Broad	4,835	4,921	4,570	4,889	2%	-7%	7%	1%
Core		24,921	27,741	29,028	30,911	11%	5%	6%	24%
Extended Area	Art Museum	7,436	8,054	8,264	8,887	8%	3%	8%	20%
	Bella Vista	2,759	2,398	2,649	2,343	-13%	10%	-12%	-15%
	Northern Liberties	410	194	336	474	-53%	73%	41%	16%
	Queen Village	1,757	2,008	2,308	2,487	14%	15%	8%	42%
	South of South	2,207	1,643	1,816	1,929	-26%	11%	6%	-13%
Extended Area		14,568	14,297	15,590	16,493	-2%	9%	6%	13%
Center City		39,488	42,038	44,618	47,404	6%	6%	6%	20%
Philadelphia		642,145	619,781	603,075	590,071	-3%	-3%	-2%	-8%

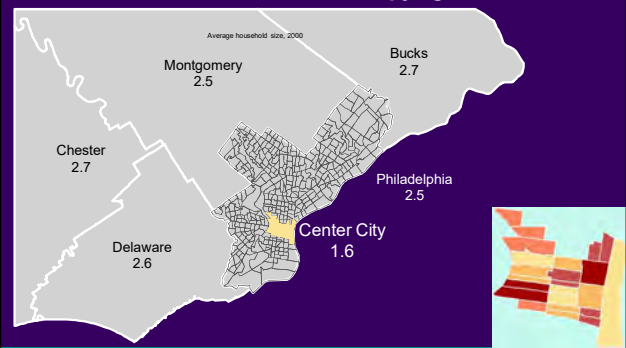
CENTER CITY DISTRICT

Smaller, more affluent, better educated

Area	Neighborhood	Year				Percent Change			
		1970	1980	1990	2000	70-80	80-90	90-00	70-00
Core	Chinatown	2.5	2.6	2.9	2.6	2%	14%	-11%	3%
	East of Broad	1.4	1.3	1.4	1.4	-5%	8%	2%	5%
	Logan Circle	1.6	1.4	1.5	1.6	-9%	6%	3%	0%
	Old City	2.2	1.6	1.4	1.4	-27%	-9%	-3%	-35%
	Rittenhouse / Fitler	1.6	1.5	1.5	1.5	-7%	-1%	0%	-8%
	Society Hill	1.9	1.8	1.7	1.6	-6%	-7%	-5%	-17%
	Wash West	1.5	1.5	1.4	1.4	-1%	-3%	-1%	-6%
	West of Broad	1.5	1.4	1.3	1.3	-6%	-5%	0%	-14%
Core		1.7	1.6	1.6	1.5	-7%	1%	-2%	-8%
Extended Area	Art Museum	2.3	1.9	1.7	1.7	-18%	-7%	-4%	-27%
	Bella Vista	3.0	2.5	2.2	1.9	-14%	-15%	-12%	-36%
	Northern Liberties	2.1	1.9	1.7	1.7	-9%	-9%	-5%	-22%
	Queen Village	2.5	2.0	1.9	1.8	-22%	-3%	-8%	-30%
	South of South	2.2	2.1	2.0	1.8	-5%	-4%	-9%	-17%
	Waterfront				1.8			-8%	
Extended Area		2.4	2.1	1.9	1.7	-15%	-9%	-7%	-28%
Center City		2.0	1.8	1.7	1.6	-11%	-4%	-5%	-19%

CENTER CITY DISTRICT

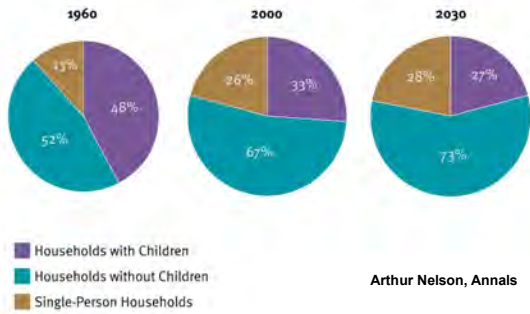
Households downtown were getting smaller:
Larger extended families replaced by singles & couples
Smaller households occupying more real estate



CENTER CITY DISTRICT

Profound long-term demographic changes

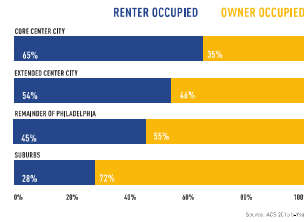
Distribution of Households with and without Children, and Single-Person Households, 1960, 2000, and 2030



CENTER CITY DISTRICT

Shrinking household size

FIGURE 17: HOUSEHOLD TENURE, 2015



Shrinking household size is fueling demand for apartments. In 1967, only 8% of Americans lived alone; rose to 15% in 2016.

Across the city, 55% of those living alone are renters

Philadelphia average household size has contracted from 3.0 persons in 1970 to 2.6 in 2015.

For every 100 people, 5 additional housing units are required today compared to 1970.

In most neighborhoods of Core Center City, household size averages just 1.6 persons per unit.

CENTER CITY DISTRICT

Use of LEHD tool

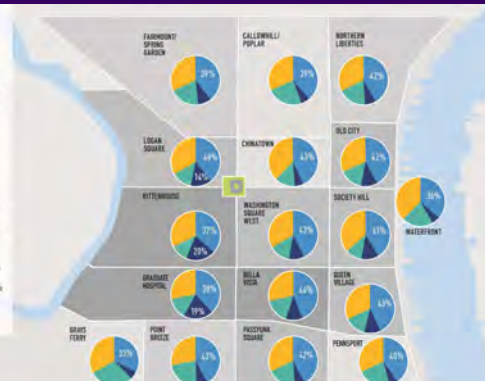
WHERE RESIDENTS GO TO WORK

MAP: PERCENT OF WORKERS EMPLOYED IN GREATER CENTER CITY & UNIVERSITY CITY

PERCENT OF WORKERS EMPLOYED IN:

- Greater Center City
- University City
- West of Philadelphia
- Outside Philadelphia

Legend: More than 50%, 51-55%, 44-50%, 40-45%



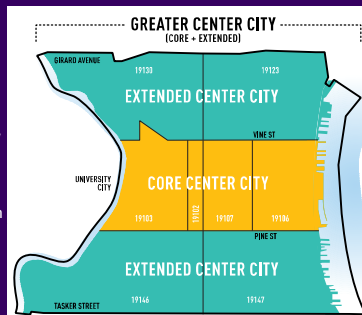
CENTER CITY DISTRICT

Core + Extended = Greater Center City

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

Definition of residential Center City is based on growing national preference for live-work environments. It includes the core commercial area, now intermixed with housing & the surrounding neighborhoods,

Outside Greater Center City an average of 25% of working residents commute to jobs downtown.



CENTER CITY DISTRICT

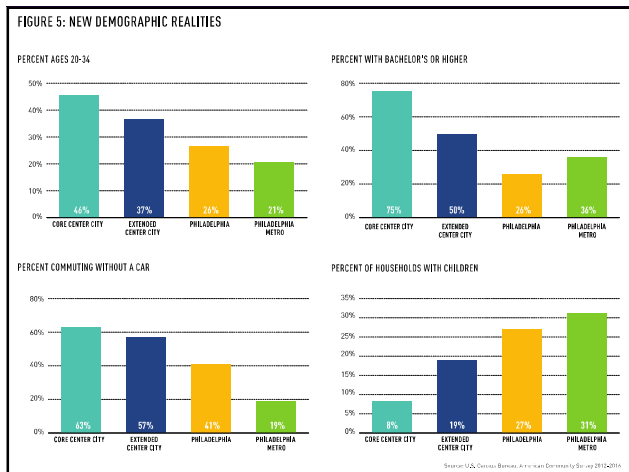
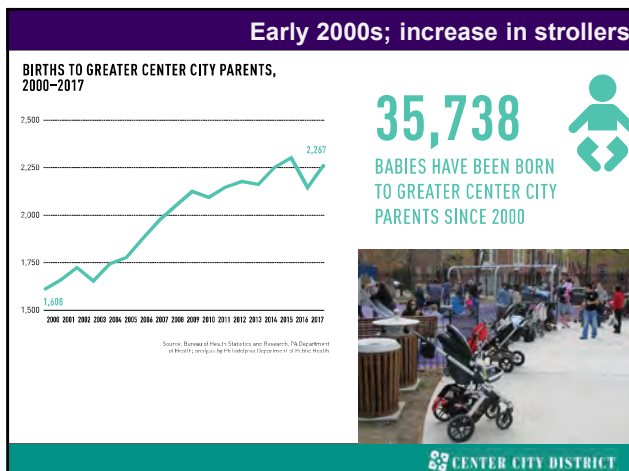


FIGURE 4: GREATER CENTER CITY NEIGHBORHOOD PROFILES

Neighborhood	Average Household Size	% of Households with Children	% Ages 20-34	Percent 65 and Older	% Bachelor's or More	Average Household Income	Non-Auto Commuting Mode Share	No Vehicle Households	%
Chinatown/Market East	2.0	12%	54%	8%	44%	\$80,877	74%	58%	
Lagan Square	1.6	5%	41%	24%	31%	\$103,471	44%	41%	
Old City	1.7	5%	86%	13%	81%	\$124,925	57%	28%	
Rittenhouse Square	1.6	7%	47%	23%	87%	\$129,883	76%	45%	
Society Hill	1.9	13%	27%	33%	84%	\$164,030	57%	29%	
Washington Square	1.7	7%	54%	16%	79%	\$93,397	73%	57%	
Waterfront	1.8	10%	34%	28%	72%	\$127,311	38%	5%	
Bella Vista	2.1	16%	36%	14%	69%	\$109,461	67%	33%	
Callanhill/Poplar	2.3	29%	33%	23%	29%	\$48,295	64%	48%	
Farmhouse/ Spring Garden	2.1	18%	37%	15%	59%	\$90,563	52%	26%	
Graduate Hospital	2.2	16%	41%	13%	68%	\$107,181	63%	33%	
Grays Ferry	2.6	23%	26%	15%	12%	\$39,501	52%	67%	
Northern Liberties	2.0	11%	49%	8%	72%	\$120,521	42%	14%	
Pasquetti Square	2.5	19%	33%	17%	43%	\$73,290	63%	37%	
Pennsport	2.4	24%	38%	12%	43%	\$79,442	47%	25%	
Point Breeze	2.4	19%	36%	17%	31%	\$58,497	60%	61%	
Queen Village	2.1	18%	36%	14%	77%	\$124,726	60%	25%	
PHILADELPHIA AVERAGE	2.4	27%	26%	16%	76%	\$58,372	41%	31%	
METRO AREA AVERAGE	2.4	31%	21%	20%	36%	\$48,881	19%	13%	

Source: U.S. Census Bureau, American Community Survey 2010-2014



2003: Can Center City's public schools be more neighborhood oriented?


Center City District Growing Smarter
The State of Center City District's Growth & Development
An Overview of the District's Growth & Development

Key Findings:

- Center City District's population is growing rapidly, with a projected increase of 100,000 by 2030.
- The district's population is becoming more diverse, with a projected increase in the number of people of color from 100,000 to 200,000 by 2030.
- The district's population is becoming more educated, with a projected increase in the number of people with a bachelor's degree or higher from 100,000 to 200,000 by 2030.
- The district's population is becoming more affluent, with a projected increase in the number of people with an income of \$50,000 or higher from 100,000 to 200,000 by 2030.

Center City District

The role of public schools




Births to Center City parents, as a percent of citywide births, have been growing since 2000 & accounted for 11% of all citywide births in 2015.

In most areas of city, number of school-age children (5 -18) closely tracks number of births in prior 17 years.

But most recent ACS data for Greater Center City for 2011-2015 show that while there were 11,039 births to Center City parents in that five-year period, only 8,386 children under age 6 remain, suggesting a 24% departure rate by the time young children reach school age.

Elsewhere in city, the difference between births & school-age children is less than 3%.

 CENTER CITY DISTRICT

2004 Launched a new effort in partnership with Jim Nevels & Paul Vallas:

www.CenterCitySchools.com



The region's best classroom is right in your backyard. In fact, it is your backyard.

 CENTER CITY DISTRICT

2004 effort: listed all types of schools: Funding William Penn Foundation & Commonwealth

Welcome to your child's new classroom. You've got a front-row seat.


HOME PAGE - ENROLLMENT PROCESS - SPECIAL EVENTS - MAPS & INFO


Parents-- You can now choose from thousands of schools in our public elementary schools. [Learn more >>](#)

Center City schools offer you the opportunity to be more involved in your child's life through the unique shared experiences that come from working, playing, living and learning right here.

Today, children who live in Center City Philadelphia can get one of the best educations in the country. With a wide choice of public, private, parochial and charter schools, you can feel confident knowing you have a wealth of options for your child.

[Click here to learn more about the Center City Elementary School Fair.](#)



 CENTER CITY DISTRICT

Built 13 individual school websites: Virtual "front door" for public schools District sought to grow market share downtown



WELCOME TO General George A. McCall School

MISSION: PRINCIPAL'S RELEASED SCHOOL COMMUNITY APPROVED PROGRAMS COMMUNITY PARTNERSHIPS WHERE THE GRADUATES GET CONTACT US

QUICK INFORMATION: 1234 Street NW, Suite 100, Philadelphia, PA 19101-1234. Grades K-5. Phone: (215) 555-1234. Email: info@mcallschool.org

CAMPUS FEATURES: Modern facilities, state-of-the-art technology, and a dedicated staff of educators and support personnel.

 CENTER CITY DISTRICT

In 2005 & 2006 hosted very successful school fairs

Choosing an elementary school for your child? Come to the...

center city elementary school fair

Saturday, October 22, 2005, Noon-3pm

ABC

CENTER CITY DISTRICT

Expanded schools website to serve these families

Kids in Center City Newsletter

SATURDAY PLAY DATE!
presented by the Market + Shops at Comcast Center

Please help us support **THE GREAT SPROUT TUCK-IN** by bringing new bedtime books and cozy pajamas for children in need.

CENTER CITY DISTRICT

Strong parent involvement in Center City schools
Many cities don't have the infrastructure

Map Results

- Chester A. Arthur School - 20th and Catherine Sts
- Betsy Martin School - 2201 Brown St
- Albert M. Greenfield School - 22nd and Chestnut Sts
- Andrew Jackson School - 1213 S 12th St
- General Philip Kearny School - 4th St and Fairmount Ave
- General George A. McClellan Elementary and Middle School - 325 S 7th St
- William M. Meredith School - 725 S 9th St
- George W. Heisinger School - 6th and Carpenter Sts
- Spring Garden School - 1146 Nixon St
- Edwin M. Jefferson School - 17th and Christian Sts
- Laura Johnson Young School - 18th and Green Sts

CENTER CITY DISTRICT

75% of children living in Greater Center City
Attend one of 19 elementary public schools between Girard & Tasker
Proposed in 2004 to cap Center City share at 70%

67% attend their catchment area (neighborhood) school

- 67% LIVE WITHIN CATCHMENT
- 14% LIVE ELSEWHERE IN GREATER CENTER CITY
- 19% LIVE OUTSIDE OF GREATER CENTER CITY

CENTER CITY DISTRICT

Population growth driven our focus on parks
Children are filling up our parks

LOGAN SQUARE

CCDC CENTER CITY DISTRICT

As quickly as we can build them



33 CENTER CITY DISTRICT

Spring 2022 Housing report

Core Center City 4 zip codes: Vine to Pine Streets;
Extended CC; 4 zip codes: Vine to Girard; Pine to Tasker

The image is a composite of three parts. On the left is an aerial photograph of Center City Philadelphia, showing a dense urban landscape with various building styles and street layouts. In the center is a map of the Center City District, which is a smaller, more detailed map showing the district's boundaries and internal streets. On the right is a larger map of the Greater Center City (Core + Extended) area, which is a map of the entire Center City area, including the Core Center City and the Extended Center City. The map is color-coded: the Core Center City is dark blue, the Extended Center City is light blue, and the Greater Center City (Core + Extended) is light green. The map also shows the names of the streets that define the boundaries of the areas: Girard Avenue, Vine St, Pine St, and Tasker Street.

Greater Center City & adjacent areas 19121, 19122, 19125, 19145, 19148

A map of the Greater Center City & adjacent areas, showing various neighborhoods and zip codes. The map is color-coded: light blue for the core area, dark blue for surrounding areas, and green for the University and South Philadelphia areas. The map includes labels for the following areas:

- PAS NORTHEAST
- NEAR NORTHEAST
- ROXBOROUGH/ HANAUER
- OLNEY/ OAK LAKE
- NORTH PHILADELPHIA
- GERMANTOWN/ CHESTNUT HILL
- NORTH PHILADELPHIA
- BRIDGESBURG/ KENSINGTON/ RICHMOND
- WEST PHILADELPHIA
- UNIVERSITY CITY
- GREAT CENTER CITY
- SOUTH PHILADELPHIA
- SOUTHWEST PHILADELPHIA
- Center City
- University City
- South City

The map also includes a legend for the zip codes: 19121, 19122, 19125, 19145, and 19148.

Housing demand driven by long-term population growth

FIGURE 2 POPULATION TRENDS, CENTER CITY AND PHILADELPHIA, 2000-2020

	2000	2010	2020	GROWTH 2000-2010	GROWTH 2010-2020	GROWTH 2000-2020
Core Center City	44,899	51,228	69,633	14%	30%	55%
Extended Center City	101,155	109,627	132,667	8%	21%	31%
Greater Center City	145,944	162,855	202,300	12%	24%	38%
All Other Neighborhoods	1,371,586	1,363,151	1,621,497	-1%	2%	2%
Philadelphia	1,517,530	1,526,806	1,823,797	1%	5%	6%

Notes: 2020 Census figures for Center City and CCD estimates.
Source: US Census Bureau, Decennial Census.

Far exceeding citywide population growth

FIGURE 24 PERCENTAGE CHANGE IN POPULATION, CENTER CITY AND PHILADELPHIA



Greater Center City demographics

Ages **20 to 34** constitute **44%** of the core Center City population, compared to **38%** in extended Center City and **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.

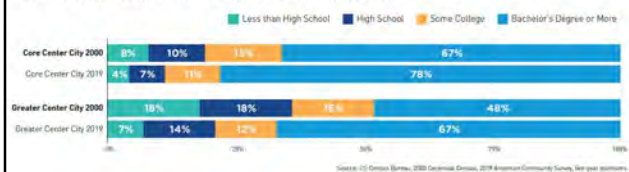
55 to 64 make up **9%** of the population

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

These last two age cohorts – many of whom moved to Center City for arts, entertainment, restaurants & proximity to work, all of which closed for much of 2020 – were probably most unsettled by 2020-2021

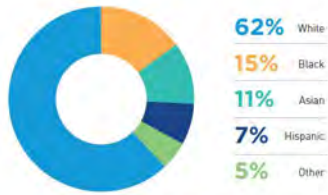
Rising Greater Center City education levels: BA's

FIGURE 25 EDUCATIONAL ATTAINMENT OF CENTER CITY POPULATION



Race & ethnicity

FIGURE 26 GREATER CENTER CITY POPULATION BY RACE AND ETHNICITY, 2020



Source: 1231 analysis of US Census Bureau 2020 decennial census.

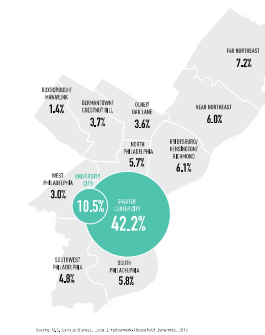
African American population in Center City has been contracting, except among 20 to 34 year olds.

While numerically small, grew by an estimated 80% between 2000 - 2019 while the Asian population in this cohort grew by 46%

CENTER CITY DISTRICT

Demand driven by concentration of jobs & transit connectivity. Will sustained remote work change that?

PHILADELPHIA EMPLOYMENT BY AREA

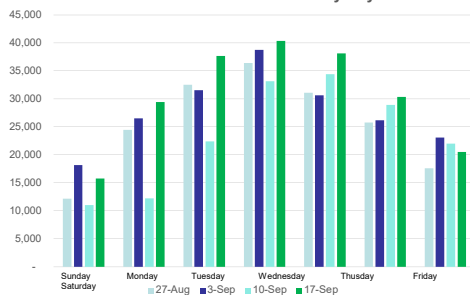


Source: 1231 analysis of US Census Bureau 2020 decennial census.

CENTER CITY DISTRICT

Office peak on Tuesday, Wednesday, Thursday Reinforce live/work downtown or suburbanization?

Office Camera Total by Day



CENTER CITY DISTRICT

Volume of sales, prices & velocity of sales: rebounded

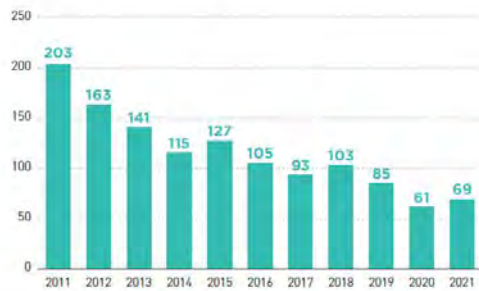
FIGURE 13 RESIDENTIAL SALES, MEDIAN SALE PRICE, AND DAYS ON MARKET, IN CENTER CITY AND PHILADELPHIA

AREA	2019	2020	2021	% CHANGE 2019-2020	% CHANGE 2020-2021	% CHANGE 2019-2021
Sales						
Core Center City	803	732	1,110	-9%	52%	38%
Extended Center City	2,221	2,485	3,234	12%	30%	44%
Greater Center City	3,024	3,217	4,344	8%	35%	44%
Adjacent ZIP Codes	2,546	2,841	3,338	11%	17%	30%
Philadelphia	16,924	16,361	18,285	-3%	10%	14%
Median Sale Price						
Core Center City	\$405,000	\$422,000	\$425,000	7%	-2%	5%
Extended Center City	\$405,000	\$427,000	\$431,250	5%	4%	11%
Greater Center City	\$405,000	\$429,000	\$441,950	8%	3%	11%
Adjacent ZIP Codes	\$280,000	\$308,000	\$310,000	7%	-3%	11%
Philadelphia	\$214,500	\$240,000	\$263,000	12%	10%	23%
Average Days on Market						
Core Center City	115	89	108	-23%	21%	-4%
Extended Center City	75	53	54	-30%	2%	-28%
Greater Center City	85	61	69	-29%	13%	-19%
Adjacent ZIP Codes	70	58	54	-17%	-3%	-20%
Philadelphia	63	44	37	-30%	16%	-19%

CENTER CITY DISTRICT

Long-term trends very positive

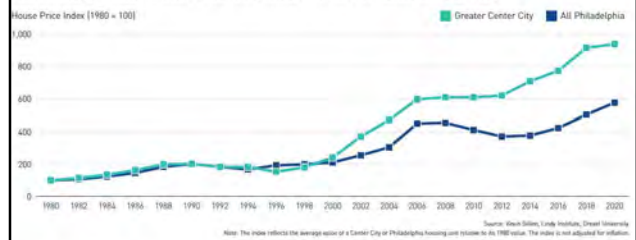
FIGURE 17 AVERAGE DAYS ON MARKET, GREATER CENTER CITY, 2011-2021



CENTER CITY DISTRICT

Gillen housing price index: Center City & Philadelphia

FIGURE 16 HOUSE PRICE INDICES: GREATER CENTER CITY AND PHILADELPHIA, 1980-2020



CENTER CITY DISTRICT

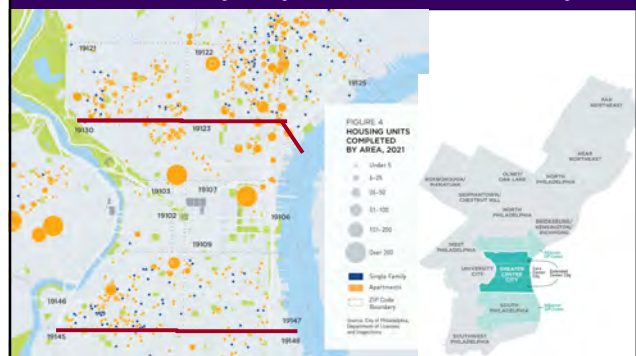
Greater Center City rebounded from 2020 1,780 units completed in 2021

FIGURE 3 GREATER CENTER CITY HOUSING UNITS COMPLETED BY TYPE, 2000-2021



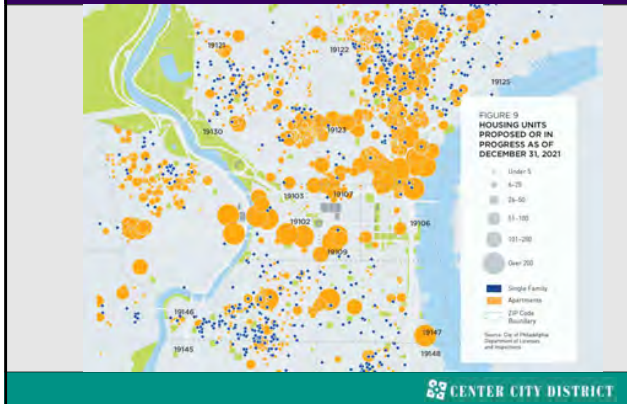
CENTER CITY DISTRICT

Largest volume in adjacent areas: 2,183 units 19121, 19122, 19125, 19145, 19148 Greater Center City + Adjacent 16% land = 62% of citywide



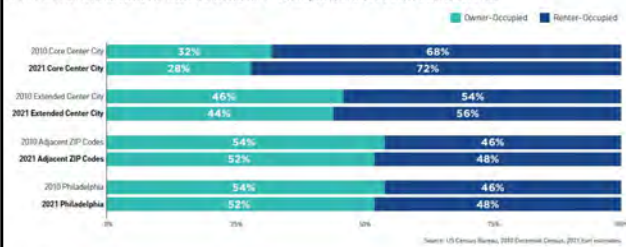
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**Council reduces value of abatement for new construction
2021: an explosion of permits filed: **apartments****

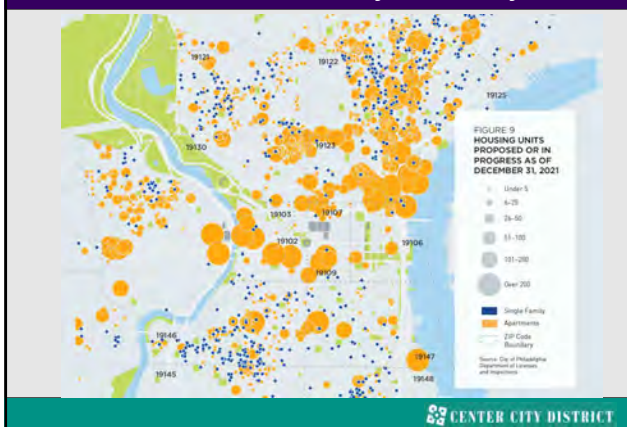


Part of a long-term shift toward rental tenure citywide

FIGURE 6 DISTRIBUTION OF HOUSEHOLDS BY TENURE, CENTER CITY AND PHILADELPHIA



How many will actually be built?



**From 2,183 to 24,470 units in Greater Center City + Adjacent
= 71% of citywide 34,612
Citywide = 624% increase in proposed units in buildings 5 or more**

FIGURE 10 PHILADELPHIA HOUSING UNITS PROPOSED OR UNDER CONSTRUCTION AS OF DECEMBER 31, 2021

AREA	UNITS	PERCENT OF CITYWIDE TOTAL
Core Center City		
West (19102, 19103)	2,993	7%
East (19106, 19107)	1,972	6%
Total	4,965	13%
Extended Center City		
Northwest (19138)	2,885	6%
Northwest (19122)	8,864	27%
Southwest (19144)	1,322	4%
Southeast (19147)	1,443	4%
Total	12,914	37%
Greater Center City		
Total	17,279	50%
Adjacent ZIP codes		
Northwest (19121)	979	3%
North (19122)	3,194	9%
Northwest (19125)	2,422	7%
Southwest (19143)	383	1%
Southeast (19148)	291	1%
Total	7,269	21%
Greater CC + Adjacent ZIP Codes Total	24,470	71%
Philadelphia Total	34,612	100%

Greater Center City
17,279 units

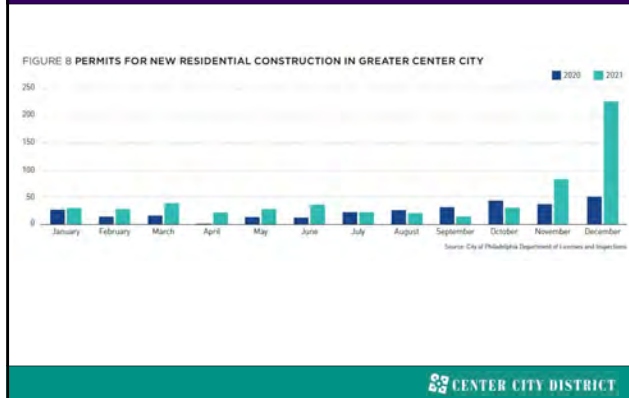
Adjacent ZIP Codes Total
7,191 units

Greater Center City and
Adjacent ZIP Codes
24,470 units

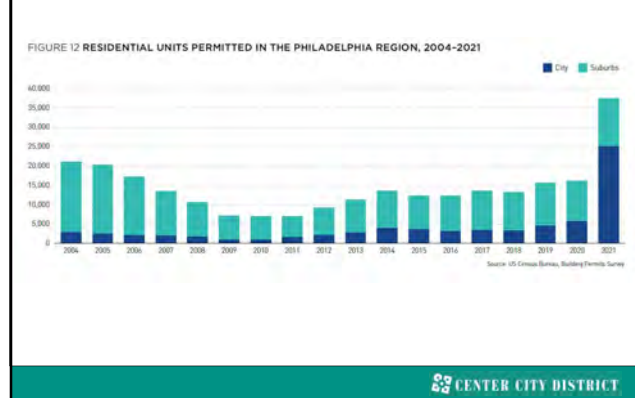
71% of Citywide Total
34,612 units

CENTER CITY DISTRICT

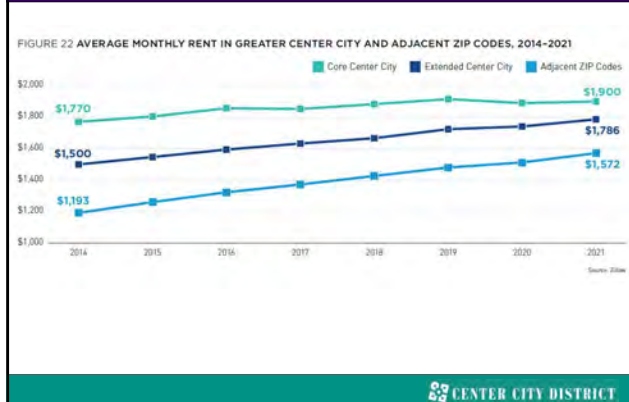
Impact of 10-year abatement reduction: Overwhelming share of permits filed in December 2021



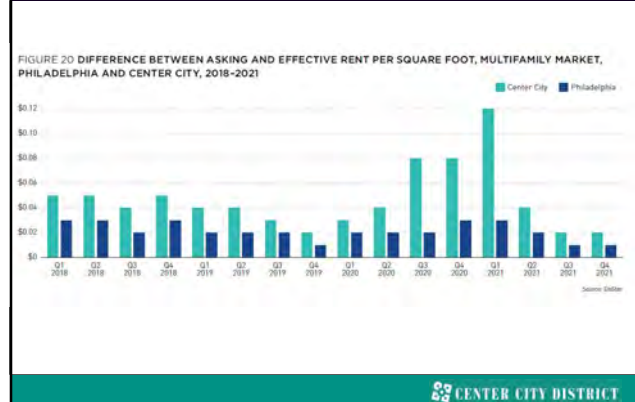
Leap from a 35% regional market share in 2020 to a 68% regional share in 2021



Rents have continued to rise in extended & adjacent Center City levelled off



Occupancy in core in back in mid 90% Asking & effective rent have come back together

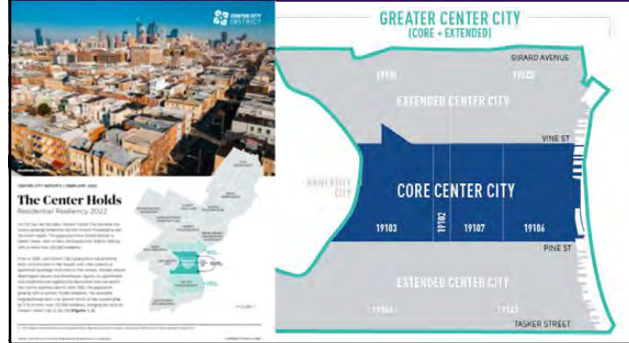


Rents held up far better than many peer cities



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A lot depends on return to work; job growth, public safety & long-term demographics



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1970s, 1980s offices



Smith-Kline office building 1980s



CENTER CITY DISTRICT

Glaxo Smith Kline moves to Navy Yard



 CENTER CITY DISTRICT

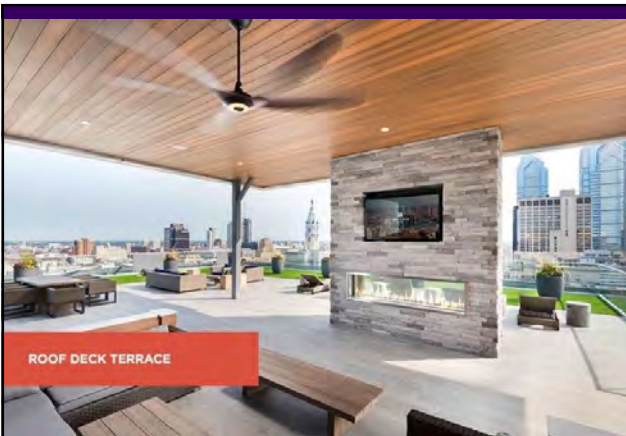
Franklin tower office conversion



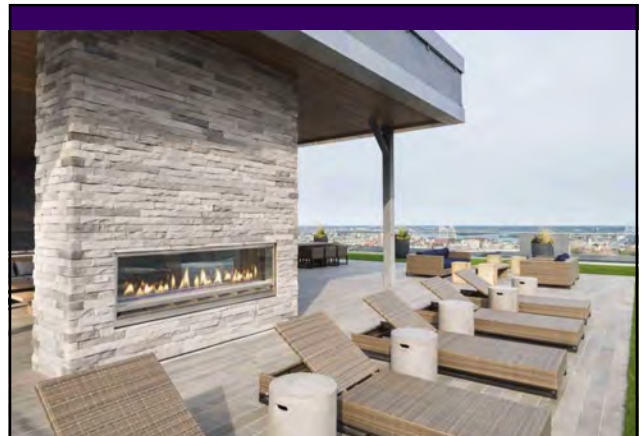
<https://pmcpropertygroup.com/property/franklin-tower-residences>


 CENTER CITY DISTRICT

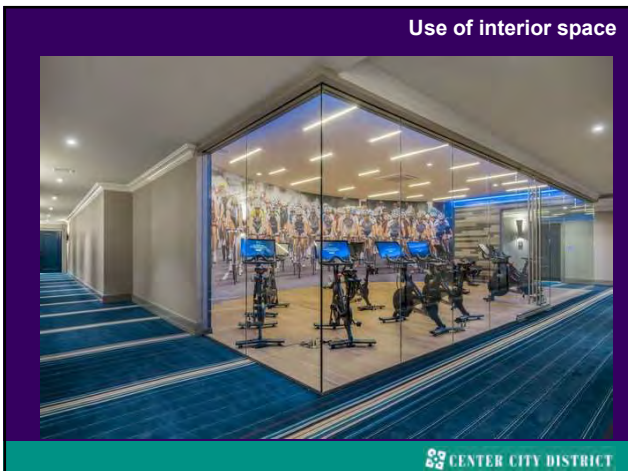
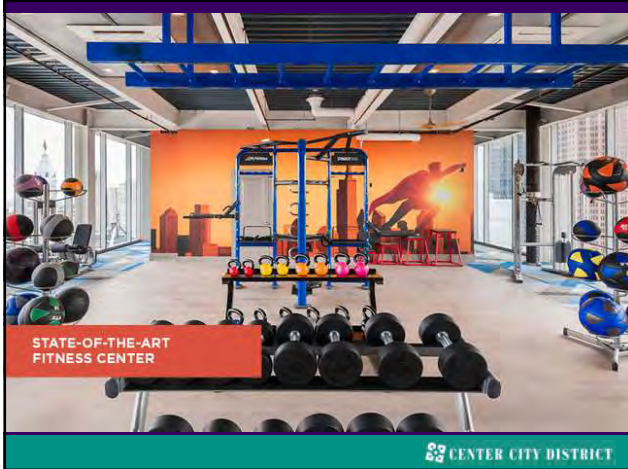
ROOF DECK TERRACE



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 CENTER CITY DISTRICT



External cladding almost done



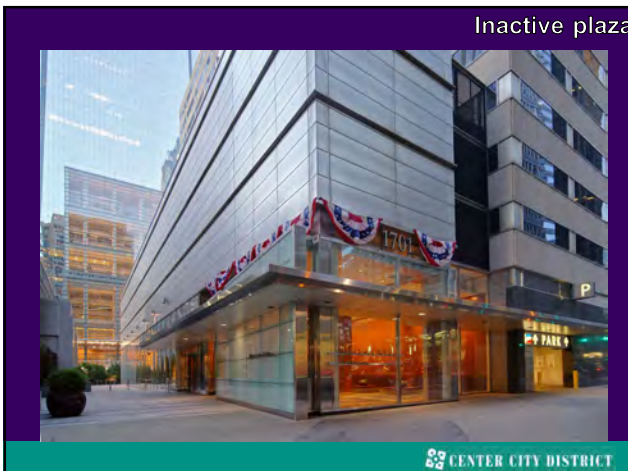
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1701 Market St



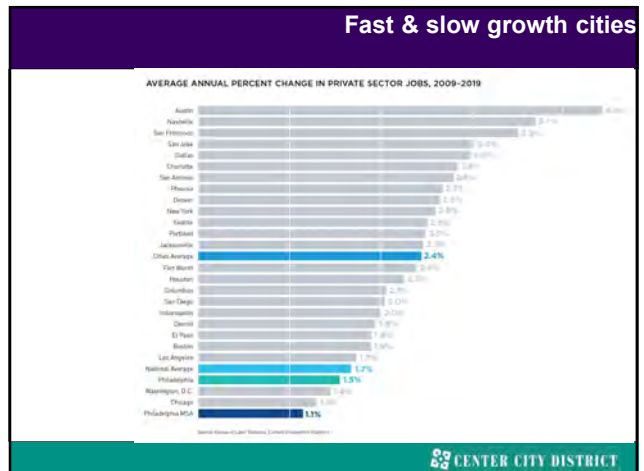
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Inactive plaza



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Fast & slow growth cities



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"Island" cities + strong growth



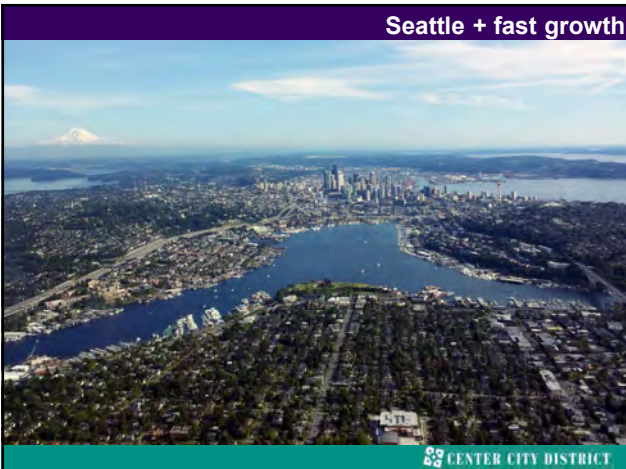
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"Peninsula" cities + fast growth



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Seattle + fast growth



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Vancouver = fast + immigration



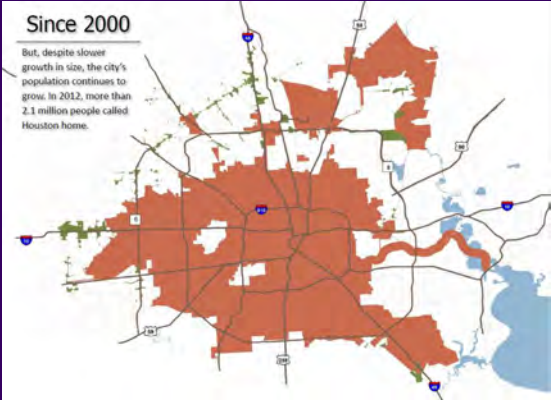
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Boston + strong growth



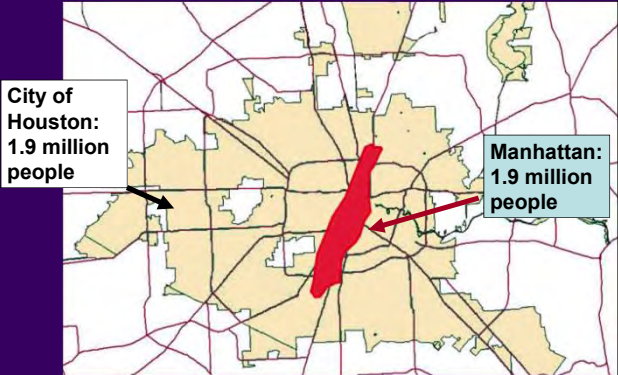
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Sprawl cities + strong growth



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Manhattan & Houston: 2000



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In between: Chicago + slow growth



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Expansive & Available land + slow growth



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Achieving affordability

- Public sector supplies
 - Publicly owned
 - Publicly subsidized
 - Protections for lower income homeowners

Increasing supply and filtering

- Inclusionary zoning
 - Public sector requires developers to allocate
 - Public creates incentives for private sector to provide (density bonuses)
- Sprawl (anti-density)
- Providing access to jobs; not housing

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San Francisco's housing is hugely expensive
But no one in Victorian San Francisco

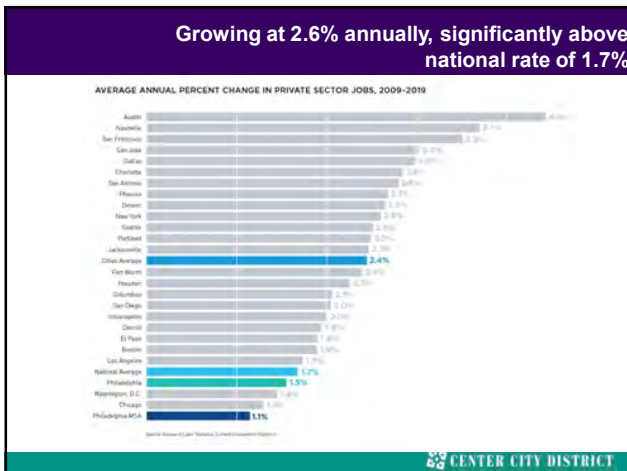
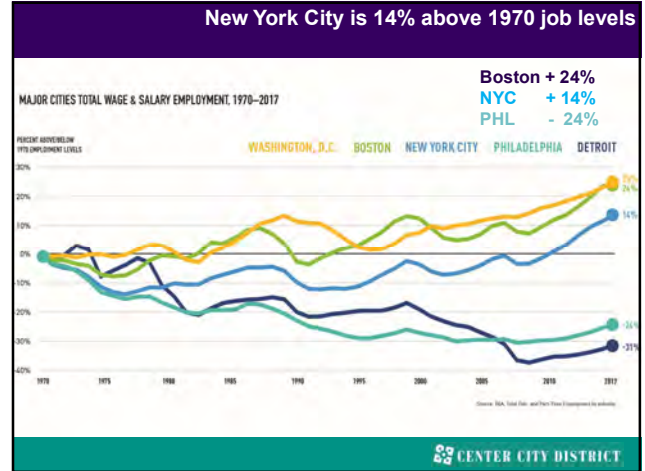


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Want to achieve affordability
By looking like Vancouver



CENTER CITY DISTRICT



Housing New York A Five-Borough, Ten-Year Plan

Housing New York is a comprehensive plan to build and preserve 200,000 units of high-quality affordable housing over the next decade. The Plan will create opportunities for New Yorkers with a range of incomes, from the very lowest to those in the middle class, and will foster vibrant and diverse neighborhoods.

CENTER CITY DISTRICT

Proposed Requirements Would Be The Most Rigorous of Any Major U.S. City

For each rezoning, the City Planning Commission and City Council can apply:

Option 1: 25 percent of housing at an average of **60% AMI**

Option 2: 30 percent of housing at an average of **80% AMI**

Plus, in limited emerging or mid-market areas, an additional option may be added:

Workforce option: 30 percent at an average of **120% AMI** (without direct subsidy)
Not available in Manhattan CDs 1-8

AMI	Income*	Sample Occupation	Allowable Monthly Rent for ZBR
40%	\$31,080	Security Guard	\$775
60%	\$46,620	Paramedic	\$1,150
80%	\$62,150	School bus driver + home health aide	\$1,550
100%	\$77,700	Teacher + retail salesperson	\$1,950
120%	\$93,240	Firefighter + server	\$2,350

* For a household of three people