FOREWORD

THE BIG PICTURE

OFFICE

HEALTHCARE & EDUCATION

CONVENTIONS, TOURISM, & HOTELS

ARTS, CULTURE, & CIVIC LIFE

RETAIL

EMPLOYMENT

TRANSPORTATION & ACCESS

SUSTAINABILITY

DOWNTOWN LIVING

CENTER CITY DISTRICT

DEVELOPMENTS

ACKNOWLEDGEMENTS
The State of Center City, 2014 offers a comprehensive overview of Philadelphia’s thriving, mixed-use downtown that concentrates 41 million square feet of office space, scores of start-up firms, 11 colleges, universities, and medical schools, three major hospitals, 11,326 hotel rooms, 409 arts and cultural institutions, 3,217 retail premises, 458 full-service restaurants, 327 outdoor cafés, and almost 180,000 residents in a dense, architecturally-rich, and walkable 17th century street-grid.

Center City provides more than 288,000 jobs, ranging from high-skilled, high-wage positions, to mid-level roles, with 30% of Center City jobs held by workers who possess no more than a high school diploma. Another 33,500 sole proprietors and partners in professional services firms conduct business in the largest employment hub in the region. Each day more than 100,000 workers commute from the immediately adjacent suburbs into Center City, while more than 141,000 city residents, 25% of employed residents from every section of Philadelphia, also work downtown.

This report provides an in-depth look at the diverse sectors that reinforce each other, creating a critical mass that fosters innovation, attracts research dollars, and draws new workers, residents, and investors to Center City. Each chapter provides both previously released, industry-specific data provided by others, as well as offering a significant amount of original research, surveys, pedestrian counts, and analyses performed by our staff, particularly focused on employment, housing, and retail trends.

The report compares Center City trends to regional patterns and benchmarks Philadelphia against other East Coast peers as a way of documenting our extraordinary success while highlighting the challenges we still must overcome. The next-to-last chapter serves as an annual report on the accomplishments of the Center City District, highlighting the effectiveness of our on-street programs, the positive results from our $105 million cumulative investment in streetscape enhancements, and our expanding role creating and managing quality parks and public spaces.

The final chapter documents the $4.7 billion that is being invested or is planned for major developments between Vine and Spring Garden Streets; it features a new developments map and provides a link to an on-line project fact sheet that will be updated throughout the year.

This project is a major, multi-month group effort by the staff of the Center City District, led by Lauren Gilchrist, Manager of Research & Analysis, designed by Abigail Saggi, Graphic Designer, with project team members including:

Casandra Dominguez, Manager of Business Retention & Retail Attraction
Linda Harris, Director of Communications & Publications
David Kanthor, Manager of Transportation & Public Spaces
Bonnie Thompson, Director of Web Development & Interactive Marketing
Richard Way, Research Assistant
RJ White, Manager of Interactive Marketing

The entire document, as well as individual sections, can be downloaded at www.CenterCityPhila.org.

Paul R. Levy
President & CEO

With the completion of Dilworth Plaza in September 2014, Center City District’s cumulative capital investment in public area improvements since 1997 will exceed $125 million.
THE BIG PICTURE
Greater Center City, the area between Girard Avenue and Tasker Street, River to River, holds 288,493 wage and salary jobs (a 3.25% increase over 2012), accounting for 43.3% of all jobs in Philadelphia. Another 33,500 sole proprietors and partners in law, accounting, and other professional services firms conduct business within this area.

Downtown firms and institutions hold the largest regional cluster of high-wage jobs, generating significant purchasing power for retailers and tax revenues for the City. But downtown creates opportunity for everyone: 30% of Center City jobs are held by workers who possess no more than a high school diploma; another 29% are held by those with associate’s degrees. On average, 25% of employed residents from every section of Philadelphia work downtown.

Located midway on the Amtrak corridor between Washington, D.C. and New York City, Center City has diversified in the last two decades into a 24-hour downtown. Compact and walkable, its sidewalks are animated by hotels, housing, cultural institutions, dining, and retail attractions.

More than 400 arts and cultural organizations are located in Greater Center City, 65% more than in 1996. Major historic and cultural destinations, such as Independence National Historical Park, attracted 9.58 million visitors in 2013, while the Academy of Natural Sciences of Drexel University on the Benjamin Franklin Parkway saw attendance increase by 21% between 2012 and 2013. But institutions of all sizes continue to present a broad range of artistic styles and performances, attracting visitors from across the region and around the world.

Downtown’s dining and food options continue to expand, with nearly 1,000 restaurants, eateries, and bars. 327 outdoor cafes enliven the sidewalks well into the evening hours. Boutique, independent, and national retailers continue to locate along Center City’s most popular shopping corridors and are expanding onto secondary streets and into neighborhood settings.

Center City sits at the center of a transit network that carried 305,000 passengers each weekday in 2013. More than 4.1 million passengers passed through Amtrak’s 30th Street Station, while more than 30 million passengers departed and arrived through Philadelphia International Airport. Greater Center City’s bike-friendly topography and expanding bike-lane network has attracted large numbers of cyclists in recent years. Philadelphia’s 2.3% bicycle-commuter rate in 2012 ranked first among the nation’s 10 largest cities, higher than New York City’s and Chicago’s. Bicycle traffic over the Schuylkill River bridges during peak hours increased 13.6% from 2012 to 2013.

Greater Center City ranks second only to Manhattan in population among U.S. downtowns. The number of residents increased 13% between 2000 and 2013 to 178,316 and is continuing to expand. Developers brought 2,091 residential units to market in 2013, the most units since the CCD began tracking the data in 1998.

Adding to a broad range of parks and public spaces, the Center City District will complete the $55 million transformation of Dilworth Plaza in fall 2014. On the west side of City Hall, a new green and sustainable park will provide a distinctive public gathering space and an attractive and more accommodating entrance to the transit system below.

With more competitive tax policies, Philadelphia will encourage the expansion of existing downtown firms, attract new firms, and retain innovative startups. With improved public education, the city will benefit from a more qualified workforce and a more rapidly growing citywide population.
**CENTER CITY KEY FACTS**

**Greater Center City Wage & Salary Employment**
- Private Sector: 227,136
- Public Sector: 61,357
- **Total Wage & Salary Jobs**: 288,493
- **Total Wage & Salary Workforce**: 271,703
- **Small Businesses**: 15,972

**Working & Living in Center City**
- **Office Square Footage**: 40.7M
- **Office Occupancy**: 86%
- **Hotel Rooms**: 11,326
- **Hotel Room Occupancy**: 73.8%
- **Average Daily Hotel Rate**: $169.49
- **Retail Premises**: 3,217
- **Retail Occupancy**: 87.7%
- **Colleges & Universities**: 11
- **Hospitals**: 5
- **Arts & Cultural Organizations**: 409

**Annual Philadelphia International Airport Passengers**: 30,504,112
**Annual Amtrak 30th street Station Passengers**: 4,125,503
**Average Weekday Center City Transit Ridership (All modes)**: 305,030
**Average Home sales Price**: $402,084
**Average One-Bedroom Apartment Rent**: $1,683

**Children Born 2000-2013**: 26,581
**College Students**: 34,795
**Households with Children Under 18**: 10,731

**Core Center City Population**: 61,896
**Extended Center City Population**: 116,419
**Greater Center City Population**: 178,316

**25 & Older with a Graduate Degree or More**
- **2000**: 67.9%, 23.7%, 17.8%, 10.2%
- **2010**: 73.4%, 22.2%, 21.6%, 10.3%
- **2012**: 75.4%, 28.5%, 21.6%, 10.6%

**25 & Older with a Graduate Degree**
- **2000**: 38.5%, 10.2%, 7.5%, 3.7%
- **2010**: 40.9%, 18.3%, 9.3%, 10.3%
- **2012**: 42.2%, 21.6%, 9.3%, 10.6%
**Greater Center City Wage & Salary Employment, 2011**

- Office: 31.1%
- Public Services: 21.3%
- Entertainment, Hospitality, & Retail: 14.2%
- Eds & Meds: 21.0%
- Transportation, Warehousing, & Wholesale Trade: 4.6%
- Other Services: 3.9%
- Real Estate & Construction: 3.1%
- Manufacturing: 0.8%

*Source: OnTheMap - 2011, Local Employment Dynamics Partnership, U.S. Census Bureau*

**Greater Center City Covered Employment, 2011**

- Office: 31.1%
- Public Services: 21.3%
- Entertainment, Hospitality, & Retail: 14.2%
- Eds & Meds: 21.0%
- Transportation, Warehousing, & Wholesale Trade: 4.6%
- Other Services: 3.9%
- Real Estate & Construction: 3.1%
- Manufacturing: 0.8%

*Source: OnTheMap - 2011, Local Employment Dynamics Partnership, U.S. Census Bureau*

**Children Born to Center City Parents by Zip Code, 2009-2013**

**Core Center City**

- 19103: 859
- 19107: 554
- 19106: 524
- 19102: 197

**Extended Center City**

- 19146: 3,049
- 19147: 2,706
- 19130: 1,619
- 19123: 1,005

*Source: Bureau of Health Statistics Research, Pennsylvania Department of Health - provided by Philadelphia Department of Public Health*

**Greater Center City Racial Diversity**

- White: 62.1%
- Black or African American: 24.5%
- Asian: 9.6%
- Two or More Races: 2.6%
- Other: 1.3%

*Source: 2008-2012 American Community Survey 5-year Estimates, U.S. Census Bureau*

2,091 units of new housing were completed in Center City in 2013.
Center City’s 86% office occupancy rate in 2013 ranked 10th among the nation’s largest downtown markets and just above the national CBD average rate of 85.8%. Downtown occupancy also surpassed Pennsylvania suburban and southern New Jersey rates of 83.9% and 83.1%, respectively. But Center City’s average rent of $24.67 per square foot was significantly below both the Northeast and national averages and lower than Philadelphia’s western suburbs. These low rents are in part a result of the limited number of major corporate headquarters in Center City. They are also a by-product of a tax structure which, between the Business Income and Receipts Tax and the Use and Occupancy Tax, can easily add a 20% to 30% premium to tenant occupancy costs.

Average asking rent for Trophy office space in Center City was $33.93 per square foot in 2013, a 3.2% increase from 2012 and a 7.3% climb since 2009. As tenants continue to migrate out of older buildings, this top-tier space continues to be in high demand downtown, enjoying a 93.9% occupancy rate, well above Class A (86.7%) and Class B (88%) office space. Average asking rent per square foot for Class A office space increased 1.6% from 2012 to $27.11. Of Center City’s four office submarkets, West Market commands the highest average rent at $27.01 per square foot and East Market the lowest at $23 per square foot. In the absence of strong business demand for older buildings, developers and owners can garner higher returns by converting these properties to residential use. As a result, Center City has not added new office space since 2008 and has the same quantity of occupied premises as it had two decades ago.

This is about to change with Comcast Corporation anchoring the new Comcast Innovation and Technology Center, consolidating and expanding its downtown presence in a new, 59-story office tower slated for completion in 2017. Comcast will have an 80% ownership stake in the $1.2 billion building, with the other 20% held by Liberty Property Trust, and will occupy approximately 950,000 of the 1.32 million square feet of office space. Designed by British architect Norman Foster, the Innovation and Technology Center will house up to 4,000 employees (2,800 of whom will be new to the city), including NBC 10, Telemundo, and a relocated Four Seasons Hotel on the top 13 floors.

In other notable transactions in 2013, Independence Blue Cross extended the lease on its headquarters at 1901 Market Street until 2033. Ten other lease agreements of over 100,000 square feet were also signed. Early in 2014, Beneficial Bank moved its headquarters and 300 employees from 510-530 Walnut Street to four floors in the 42-story office tower 1818 Market Street. The building’s name will be changed to 1818 Beneficial Bank Place.

In addition to Center City’s traditional role as a center for law, accounting, finance, and business support services, a new emerging cluster of technology firms has been locating in the downtown. iPipeline, an insurance-software maker based in Exton, has leased space at 1818 Market Street. Construction-software maker Bentley Systems and cloud mobile device manager Fiberlink also moved into the city in order to capitalize on the presence of young, high-tech workers who prefer to live downtown. Brand.com, an online reputation and brand management company, transferred 120 employees from West Chester to the Curtis Center at Sixth and Walnut Streets and plans to hire an additional 100 employees. In March 2014, SevOne, a Wilmington, Delaware, based IT management firm, moved its development team from Old City to a larger office space in the Land Title Building at Broad and Chestnut Streets. Other tech company openings, expansions, and relocations in the downtown included Happy Cog, Curalate, Poptent, SnipSnap, Uber, RJ Metrics, and Cloudmine.
## OCCUPANCY RATES & RENTS FOR THE 20 LARGEST CBD OFFICE MARKETS, Q4 2013

<table>
<thead>
<tr>
<th>Market</th>
<th>Total Square Feet</th>
<th>Vacant Square Feet</th>
<th>Occupancy Rate</th>
<th>2013 Absorption</th>
<th>Average Asking Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center City</td>
<td>40,700,411</td>
<td>5,697,509</td>
<td>86.0%</td>
<td>154,309</td>
<td>$24.67</td>
</tr>
<tr>
<td>West Market</td>
<td>25,160,472</td>
<td>3,305,391</td>
<td>86.9%</td>
<td>376,915</td>
<td>$27.01</td>
</tr>
<tr>
<td>East Market</td>
<td>6,506,798</td>
<td>1,090,830</td>
<td>83.2%</td>
<td>-401,676</td>
<td>$23.00</td>
</tr>
<tr>
<td>Independence Square</td>
<td>4,831,077</td>
<td>749,877</td>
<td>84.5%</td>
<td>48,854</td>
<td>$23.76</td>
</tr>
<tr>
<td>Walnut/South Broad</td>
<td>4,202,064</td>
<td>551,411</td>
<td>86.9%</td>
<td>130,216</td>
<td>$24.90</td>
</tr>
<tr>
<td>University City</td>
<td>2,528,880</td>
<td>163,153</td>
<td>93.5%</td>
<td>42,138</td>
<td>$32.10</td>
</tr>
<tr>
<td>CBD Total</td>
<td>43,229,291</td>
<td>5,860,662</td>
<td>86.4%</td>
<td>196,447</td>
<td>$25.67</td>
</tr>
</tbody>
</table>

Note: All data is from Cushman & Wakefield, except for Philadelphia statistics, which are from Newmark Grubb Knight Frank.
Source: Cushman & Wakefield and Newmark Grubb Knight Frank

West Market saw the greatest growth in occupancy, offset by the contraction and movement of federal agencies on East Market.
**Central Business District Construction Activity, Q4 2013**

<table>
<thead>
<tr>
<th>Central Business District (CBD)</th>
<th>Office Space Under Construction (sf)</th>
<th>% of National CBD Office Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downtown Manhattan, NY</td>
<td>5,503,144</td>
<td>23.7%</td>
</tr>
<tr>
<td>Midtown Manhattan, NY</td>
<td>2,386,937</td>
<td>10.3%</td>
</tr>
<tr>
<td>Seattle, WA</td>
<td>2,379,425</td>
<td>10.2%</td>
</tr>
<tr>
<td>San Francisco, CA</td>
<td>1,875,058</td>
<td>8.1%</td>
</tr>
<tr>
<td>Boston, MA</td>
<td>1,170,000</td>
<td>5.0%</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>1,000,000</td>
<td>4.3%</td>
</tr>
<tr>
<td>Raleigh/Durham, NC</td>
<td>967,063</td>
<td>4.2%</td>
</tr>
<tr>
<td>Austin, TX</td>
<td>812,466</td>
<td>3.5%</td>
</tr>
<tr>
<td>Pittsburgh, PA</td>
<td>800,000</td>
<td>3.4%</td>
</tr>
<tr>
<td>Orange County, CA</td>
<td>788,696</td>
<td>3.4%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>758,140</td>
<td>3.3%</td>
</tr>
<tr>
<td>Denver, CO</td>
<td>676,950</td>
<td>2.9%</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>550,000</td>
<td>2.4%</td>
</tr>
<tr>
<td>New Haven, CT</td>
<td>500,000</td>
<td>2.1%</td>
</tr>
<tr>
<td>Midtown Manhattan - South, NY</td>
<td>472,600</td>
<td>2.0%</td>
</tr>
<tr>
<td>Dallas, TX</td>
<td>454,500</td>
<td>2.0%</td>
</tr>
<tr>
<td>Salt Lake City, UT</td>
<td>354,781</td>
<td>1.5%</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>354,610</td>
<td>1.5%</td>
</tr>
<tr>
<td>Richmond, VA</td>
<td>307,000</td>
<td>1.3%</td>
</tr>
<tr>
<td>Portland, OR</td>
<td>288,000</td>
<td>1.2%</td>
</tr>
<tr>
<td>Buffalo, NY</td>
<td>285,000</td>
<td>1.2%</td>
</tr>
<tr>
<td>Cincinnati, OH</td>
<td>280,000</td>
<td>1.2%</td>
</tr>
<tr>
<td>Phoenix, AZ</td>
<td>155,000</td>
<td>0.7%</td>
</tr>
<tr>
<td>Milwaukee, WI</td>
<td>73,100</td>
<td>0.3%</td>
</tr>
<tr>
<td>Providence, RI</td>
<td>48,000</td>
<td>0.2%</td>
</tr>
<tr>
<td>Tucson, AZ</td>
<td>27,060</td>
<td>0.1%</td>
</tr>
<tr>
<td>Philadelphia, PA</td>
<td>-</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>National - CBDs</strong></td>
<td><strong>23,267,530</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

Source: Cushman & Wakefield

**1990 Regional Office Inventory**

- Delaware: 11.4%
- Southern New Jersey: 12.4%
- Center City: 36.3%
- Pennsylvania Suburbs: 39.8%

Source: Newmark Grubb Knight Frank

**2013 Regional Office Inventory**

- Delaware: 12.1%
- Southern New Jersey: 12.9%
- Center City: 29.1%
- Pennsylvania Suburbs: 45.0%

Source: Newmark Grubb Knight Frank

Although Center City had no office construction activity at the end of 2013, the **$1.2 billion**, 59-story Comcast Innovation and Technology Center will add **1.32 million** square feet of office space to the downtown.
Average asking rents in Trophy office buildings rose **3.2%** between 2012 and 2013.

**Center City Average Asking Rent**

<table>
<thead>
<tr>
<th>Year</th>
<th>Trophy</th>
<th>Class A</th>
<th>Class B</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>$31.63</td>
<td>$26.53</td>
<td>$22.53</td>
</tr>
<tr>
<td>2010</td>
<td>$31.27</td>
<td>$26.77</td>
<td>$22.49</td>
</tr>
<tr>
<td>2011</td>
<td>$32.72</td>
<td>$26.80</td>
<td>$22.29</td>
</tr>
<tr>
<td>2012</td>
<td>$32.88</td>
<td>$26.67</td>
<td>$22.43</td>
</tr>
<tr>
<td>2013</td>
<td>$33.93</td>
<td>$27.11</td>
<td>$23.10</td>
</tr>
</tbody>
</table>

Source: Jones Lang LaSalle

**Center City Total Occupancy Rate**

<table>
<thead>
<tr>
<th>Year</th>
<th>Trophy</th>
<th>Class A</th>
<th>Class B</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>94.1%</td>
<td>87.1%</td>
<td>88.0%</td>
</tr>
<tr>
<td>2010</td>
<td>91.2%</td>
<td>85.0%</td>
<td>86.6%</td>
</tr>
<tr>
<td>2011</td>
<td>93.2%</td>
<td>86.7%</td>
<td>86.7%</td>
</tr>
<tr>
<td>2012</td>
<td>93.9%</td>
<td>87.5%</td>
<td>88.0%</td>
</tr>
<tr>
<td>2013</td>
<td>93.9%</td>
<td>86.7%</td>
<td>88.0%</td>
</tr>
</tbody>
</table>

Source: Jones Lang LaSalle

**Average Class A Rent in the Philadelphia Region**

<table>
<thead>
<tr>
<th>Region</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania Suburbs</td>
<td>$27.53</td>
<td>$26.53</td>
<td>$26.08</td>
<td>$27.31</td>
<td>$27.95</td>
</tr>
<tr>
<td>New Castle, DE</td>
<td>$27.53</td>
<td>$26.53</td>
<td>$26.08</td>
<td>$27.31</td>
<td>$27.95</td>
</tr>
<tr>
<td>Center City</td>
<td>$27.53</td>
<td>$26.53</td>
<td>$26.08</td>
<td>$27.31</td>
<td>$27.95</td>
</tr>
<tr>
<td>Southern New Jersey</td>
<td>$27.11</td>
<td>$27.11</td>
<td>$27.11</td>
<td>$27.11</td>
<td>$27.11</td>
</tr>
</tbody>
</table>

Source: Jones Lang LaSalle
### Significant Office Leasing Transactions in Center City - January 1, 2013-March 1, 2014 (50,000 sf or more)

#### Market Street West

<table>
<thead>
<tr>
<th>Tenant</th>
<th>Building Name</th>
<th>Class</th>
<th>Size</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comcast Corporation</td>
<td>1800 Arch Street</td>
<td>Trophy</td>
<td>953,000</td>
<td>Relocation with Expansion</td>
</tr>
<tr>
<td>Independence Blue Cross</td>
<td>1901 Market Street</td>
<td>A</td>
<td>800,000</td>
<td>Renewal</td>
</tr>
<tr>
<td>Pepper Hamilton</td>
<td>Two Logan Square</td>
<td>Trophy</td>
<td>268,000</td>
<td>Renewal</td>
</tr>
<tr>
<td>PricewaterhouseCoopers</td>
<td>Two Commerce Square</td>
<td>Trophy</td>
<td>161,825</td>
<td>Renewal with Contraction</td>
</tr>
<tr>
<td>Drinker Biddle &amp; Reath</td>
<td>One Logan Square</td>
<td>Trophy</td>
<td>154,551</td>
<td>Renewal with Contraction</td>
</tr>
<tr>
<td>Reliance Standard</td>
<td>Two Commerce Square</td>
<td>Trophy</td>
<td>137,663</td>
<td>Renewal with Expansion</td>
</tr>
<tr>
<td>Defenders Association of Philadelphia</td>
<td>1428 Chestnut Street</td>
<td>B</td>
<td>117,666</td>
<td>Renewal</td>
</tr>
<tr>
<td>Beneficial Mutual Bancorp</td>
<td>1818 Market Street</td>
<td>A</td>
<td>95,764</td>
<td>Relocation</td>
</tr>
<tr>
<td>Philadelphia Healthcare Management Corporation</td>
<td>Centre Square - East Tower</td>
<td>A</td>
<td>89,072</td>
<td>Relocation</td>
</tr>
<tr>
<td>Education Management Corporation</td>
<td>1618 Chestnut Street</td>
<td>B</td>
<td>79,480</td>
<td>Renewal</td>
</tr>
<tr>
<td>Comcast Corporation</td>
<td>Three Logan Square</td>
<td>Trophy</td>
<td>65,912</td>
<td>Expansion</td>
</tr>
<tr>
<td>Grant Thornton</td>
<td>Two Commerce Square</td>
<td>Trophy</td>
<td>62,948</td>
<td>Internal Relocation with Contraction</td>
</tr>
<tr>
<td>Philadelphia Workforce Initiative</td>
<td>1617 JFK Boulevard</td>
<td>B</td>
<td>51,508</td>
<td>Renewal</td>
</tr>
</tbody>
</table>

#### Market Street East

<table>
<thead>
<tr>
<th>Tenant</th>
<th>Building Name</th>
<th>Class</th>
<th>Size</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSA - Department of Labor</td>
<td>Curtis Center</td>
<td>A</td>
<td>140,983</td>
<td>Renewal</td>
</tr>
<tr>
<td>GSA - Region 3 Headquarters</td>
<td>100 Independence Mall West</td>
<td>A</td>
<td>135,715</td>
<td>Relocation with Contraction</td>
</tr>
<tr>
<td>GSA</td>
<td>Public Ledger Building</td>
<td>B</td>
<td>109,517</td>
<td>Renewal</td>
</tr>
<tr>
<td>Ewing Cole</td>
<td>Federal Reserve Building</td>
<td>A</td>
<td>77,602</td>
<td>Renewal</td>
</tr>
<tr>
<td>BDP International</td>
<td>Penn Mutual Towers</td>
<td>A</td>
<td>58,983</td>
<td>Renewal</td>
</tr>
</tbody>
</table>

Source: Jones Lang LaSalle
HEALTHCARE & EDUCATION
Center City’s 11 institutions of higher education enrolled more than 32,000 students in fall 2012. An additional 88,601 students attended colleges and universities across the Schuylkill in University City at Drexel University, the University of Pennsylvania, and the University of the Sciences, as well as north of Center City, at Temple’s main campus. A significant number of these 121,000 students rent apartments in Center City, patronize downtown retailers, and fill cafes and restaurants.

The downtown facilities of Hahnemann University Hospital, Magee Rehabilitation, Pennsylvania Hospital, Thomas Jefferson University Hospital, and Wills Eye Hospital admitted a combined 55,403 patients in 2012. Though the number of inpatient admissions dipped slightly compared to 2011, these hospitals generated $2.36 billion in net revenue, $136.3 million more than they did in the previous year.

Philadelphia is a recognized leader in innovation and research, home to world-renowned institutions and universities that secure significant federal and private-sector research grants. Expenditures in 2012 totaled $1.25 billion for Drexel University, Temple University, Thomas Jefferson University, and the University of Pennsylvania; at $911 million, Penn accounted for 72.9% of this total.

In 2012, Drexel University, Temple University, and Thomas Jefferson University all applied for more patents than they did in 2011, with the volume of patent applications at Drexel growing 20% over 2011. While new patent applications from the University of Pennsylvania dropped slightly, Penn still accounted for more than 50% of total applications from the four research institutions.

In September 2013, Penn Medicine officially opened its new 153,000-square-foot “green” medical building at Eighth and Walnut Streets. The new facility houses Penn Medicine Washington Square, consolidating Pennsylvania Hospital’s ambulatory and support functions. In October, Drexel University opened the new $92 million Gerri C. LeBow Hall, a 12-story, 177,500-square-foot, limestone-and-glass building at 33rd and Market Streets. The new building houses the LeBow College of Business, which includes a new School of Economics that offers master’s and doctoral degrees in economics.

Independence Blue Cross (IBC) announced the opening of a new Center for Healthcare Innovation at 17th and Market Streets. This 5,000-square-foot facility will serve as the home for IBC’s Strategic Innovation Portfolio and for DreamIt Health Philadelphia, Philadelphia’s first healthcare accelerator. The Strategic Innovation Portfolio will invest up to $50 million in health-related venture funds and early stage companies. The Center will also host meetings for the Health Care Innovation Task Force, university health research collaborations, and IBC’s health IT portfolio companies.
With 11,752 employees, Thomas Jefferson University and Hospital is Center City’s largest private employer.
Center City Hospital Net Patient Revenue

Net patient revenue at Center City hospitals increased by $136.3 million between 2011 and 2012.

Source: Pennsylvania Healthcare Cost Containment Council
Drexel, Temple, Thomas Jefferson, and the University of Pennsylvania collectively invested more than **$1.25 billion** in research activities in 2012.
ReseaRch exPenDituRes at CenteR City & aDjaCent univeRsities

higheR edUCaTiOn eNROllMeNT , Fall 2012

Less than 500
500-2,000
Greater than 10,000

Arts educational Institutions
Comprehensive educational Institutions
medical & science educational Institutions

Fall 2012 Enrollment
1. Academy of Vocal Arts
2. Art Institute of Philadelphia
3. Community College of Philadelphia
4. Curtis Institute of Music
5. Drexel College of Medicine
6. Drexel University
7. Metropolitan Career Center - Computer Technology Institute
8. Moore College of Art & Design
9. Peirce College
10. Pennsylvania Academy of the Fine Arts
11. Temple University*
12. Temple University, Center City Campus*
13. Temple University, School of Podiatric Medicine*
14. Thomas Jefferson University
15. University of the Arts
16. University of Pennsylvania
17. University of the Sciences

*Note: Data provided by Temple University Center City.
Source: Integrated Postsecondary Education Data System, National Center for Education Statistics

Enrollment at the major universities in and around Center City increased 3.4% between 2011 and 2012 to 121,000 students.
CONVENTIONS, TOURISM, & HOTELS
The largest conventions in 2013 were Lightfair International, which attracted 23,000 visitors, and Greenbuild, with 22,000 visitors, the world’s largest conference and expo devoted to green building. Currently, the largest traditional conventions or trade shows booked for 2014 do not exceed 13,000 individuals, limiting convention-driven demand for hotel rooms in Center City. However, both East Coast Volleyball and the Philadelphia Marathon will fill a significant number of hotel rooms.

The Home show, one of the Convention Center’s top gate shows, saw a dramatic boost in attendance in 2013, attracting 63,441 people, a 125% increase over 2012. Meanwhile, the two largest gate shows, the Auto Show and the Flower Show, together attracted more than 450,000 attendees. In 2014, East Coast Volleyball and the Philadelphia Marathon events are expected to reach a combined 66,000 in attendance, with total anticipated Convention Center attendance in 2014 of 1.04 million.

Expanding leisure and business travel has helped drive demand for downtown hotel rooms. Since 2004, the individual leisure travel share of occupied hotel room nights in Center City increased by 34%, with business travel demand up 8.5%. Since these segments of the market do not require large hotel room blocks, as do major conventions, several hotel developers and operators completed more moderately-sized projects in 2013. In Rittenhouse Square, Radisson completed a $20 million renovation of the 301-room Radisson Warwick Hotel, rebranding it as the Radisson Blu Warwick Hotel, the third Blu to open in North America. Across the street from the Pennsylvania Convention Center, the nine-story, $60 million Hilton Home2 Suites opened in August, adding 248 rooms at 12th and Arch Streets.

Hotel room supply will continue to expand in Center City in the next two years. The announced $280.4 million W Hotel and Element Hotel, both by Westin, at 15th and Chestnut Streets will occupy a new, 50-story tower, adding 755 rooms, a size sufficient to handle accommodations for a major convention. This project is supported by a tax-increment financing district, approved by City Council in December 2013, which will provide $33 million in public financing for construction. At Broad and Spruce Streets, the proposed $220 million, 47-story, mixed-use SLS International is expected to break ground in fall 2014, bringing another 149 hotel rooms to the market. Also expected to start in 2015 is the $90 million conversion of the Benjamin Franklin Parkway’s historic Family Court into a 199-room Kimpton Hotel.

Center City attractions drew more than 9.58 million visitors in 2013, 3.6 million of whom visited the Independence National Historic Park. Unveiling its new $24 million, 683-space parking garage, the Philadelphia Zoo saw its attendance continue to rise, reaching more than 1.28 million visitors in 2013. Franklin Square continued to build toward the one million visitors mark, reaching 928,733 in 2013. The Parkway’s Academy of Natural Sciences drew 249,563 visitors, nearly 43,400 more visitors in 2013 than 2012, a 21% increase.

Even as modest amounts of new hotel room supply came to the market in 2013, demand for room nights remained stable: average daily hotel room rates increased slightly to $169.49, and occupancy rates slipped marginally from 74.3% to 73.8%.
CONVENTIONS, TOURISM, & HOTELS

OVERSEAS VISITATION TO THE PHILADELPHIA FIVE-COUNTY REGION

Center City non-convention business travelers occupied 1.06 million hotel room nights in 2013, **35.5%** of all occupied hotel room nights in the downtown.

OCCUPIED CENTER CITY HOTEL ROOMS BY PURPOSE OF TRIP

**2013 Total Room Nights: 3 million**

- Individual Leisure
- Commercial / Government
- Airline Crews
- PHLCVB Group - Non-Convention Center
- Convention Center Related
- Hotel Group

Source: Hospitality Snapshot, PKF Consulting - provided by Visit Philadelphia
Independence National Historical Park (All Attractions)*

Independence Visitor Center*

Liberty Bell Center*

National Constitution Center*

Independence Hall*

Philadelphia Zoo

Franklin Square

Franklin Institute

Philadelphia Museum of Art

Please Touch Museum

Eastern State Penitentiary

The Barnes Foundation**

Academy of Natural Sciences of Drexel University

Christ Church and Burial Grounds

Betsy Ross House

Penn Museum

Historic Philadelphia Center

Mütter Museum

National Museum of American Jewish History

Annual visitation to the Academy of Natural Sciences of Drexel University increased 21% between 2012 and 2013.

* Note: Attendance for Independence National Historical Park is an estimate of the number of unique visitors to the Park and does not represent the sum of all visits to individual Park attractions.

** Note: 2012 attendance numbers for the Barnes Foundation cover May - December 2012.

Source: Hospitality Snapshot, PKF Consulting - provided by Visit Philadelphia
Center City hotels made up 32.2% of the five-county regional hotel market in 2013.

The average daily rate for Center City hotel rooms increased 2.9% annually between 2004 and 2013.
15.6% of Philadelphia’s international visitors in 2013 traveled from China, India, South Korea, and Japan.

### Largest Conventions, Trade Shows, & Gate Shows, 2013

<table>
<thead>
<tr>
<th>Convention &amp; Trade Shows</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia Marathon</td>
<td>30,000</td>
</tr>
<tr>
<td>Lightfair International</td>
<td>23,000</td>
</tr>
<tr>
<td>U.S. Green Building Council</td>
<td>22,000</td>
</tr>
<tr>
<td>East Coast Volleyball, Inc.</td>
<td>20,000</td>
</tr>
<tr>
<td>Narcotics Anonymous World Services, Inc.</td>
<td>20,000</td>
</tr>
<tr>
<td>Pittsburgh Conference on Analytical Chemistry and Applied Spectroscopy</td>
<td>18,000</td>
</tr>
<tr>
<td>American Association of Orthodontists</td>
<td>16,500</td>
</tr>
<tr>
<td>American Thoracic Society</td>
<td>15,000</td>
</tr>
<tr>
<td>UBM Canon LLC</td>
<td>15,000</td>
</tr>
<tr>
<td>International Association of Chiefs of Police</td>
<td>14,000</td>
</tr>
</tbody>
</table>

Source: Philadelphia Convention & Visitors Bureau

<table>
<thead>
<tr>
<th>Gate Shows</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Show</td>
<td>228,384</td>
</tr>
<tr>
<td>Flower Show</td>
<td>223,667</td>
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<tr>
<td>Home Show</td>
<td>63,441</td>
</tr>
<tr>
<td>Comic Con</td>
<td>34,586</td>
</tr>
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</table>

Source: Pennsylvania Convention Center

### Largest Conventions & Trade Shows Anticipated for 2014

<table>
<thead>
<tr>
<th>Convention &amp; Trade Shows</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Coast Volleyball, Inc.</td>
<td>34,000</td>
</tr>
<tr>
<td>Philadelphia Marathon</td>
<td>32,000</td>
</tr>
<tr>
<td>American Educational Research Association</td>
<td>13,000</td>
</tr>
<tr>
<td>American Academy of Neurology</td>
<td>12,500</td>
</tr>
<tr>
<td>American Library Association</td>
<td>12,000</td>
</tr>
<tr>
<td>National Association of Letter Carriers</td>
<td>12,000</td>
</tr>
<tr>
<td>American Society of Nephrology</td>
<td>12,000</td>
</tr>
<tr>
<td>Competitor Group</td>
<td>10,000</td>
</tr>
<tr>
<td>Infectious Diseases Society of America</td>
<td>10,000</td>
</tr>
<tr>
<td>National Soccer Coaches Association of America</td>
<td>9,000</td>
</tr>
</tbody>
</table>

Source: Philadelphia Convention & Visitors Bureau

### 2014 Anticipated Convention Center Attendance

| 2014 Anticipated Convention Center Attendance | 1,035,000 |

### Visitors to the Philadelphia Five-County Region by Country, 2012

- United Kingdom: 14.6%
- Germany: 13.9%
- France: 8.6%
- China: 5.2%
- Italy: 4.5%
- India: 4.2%
- South Korea: 3.2%
- Switzerland: 3.9%
- Japan: 3.0%
- Brazil: 3.0%
- South Korea: 3.2%
- All Other Countries: 35.8%

Source: Office of Travel and Tourism Industries, U.S. Department of Commerce - provided by Philadelphia Convention & Visitors Bureau
ARTS, CULTURE, & CIVIC LIFE
This sector was slow to emerge from recession but added jobs in both 2011 and 2012. Many performing arts organizations also saw increases in attendance between 2012 and 2013, notably at the Walnut Street Theatre, Arden Theatre Company, Opera Philadelphia, Philadelphia Chamber Music Society, and the Curtis Institute of Music. Eastern State Penitentiary attracted 305,267 visitors, a 20% increase over 2012. The African American Museum continued to attract more visitors, drawing close to 80,000, a 10% increase from 2012. Nearly 250,000 visited the Academy of Natural Sciences of Drexel University, a 21% increase over the prior year.

Notable in 2013 was the opening of the Philadelphia Zoo’s $32 million LEED-certified KidZooU exhibit, a first-of-its kind focus on domestic rare-breeds, helping zoo attendance climb to 1.28 million in 2013.

In the historic area, the Benjamin Franklin Museum at 317 Chestnut Street reopened to the public in August 2013 after undergoing a two-year, $15 million makeover. The 7,000-square-foot underground museum, originally built for the Bicentennial, now features artifacts, computer animation, and interactive displays. Just doors away, at 321 Chestnut Street, the National Liberty Museum received a $2.5 million grant from the John Templeton Foundation to create an interactive and audio-visual exhibit for its entryway.

At Race Street and Columbus Boulevard, the FringeArts’ new home in a former water pump house includes a 240-seat theater supporting regional talent and year-round programming. In 2014, a bar, restaurant, and outdoor plaza will be added.

On the Avenue of the Arts, the Kimmel Center is opening Jose Garces’ new restaurant, Volver, part of a $14 million renovation that includes the new SEI Innovation Studio, a 200-seat, 2,700-square-foot venue with a new, 22-foot-high, glass-panel entrance. With programmable signage along Spruce Street, the new entrance and restaurant animate what had been largely a blank wall on the south side of the block.

In an effort to increase revenue and blend exhibitions and programs from both institutions, the Rosenbach Museum and Library at 20th Street and Delancey Place officially joined the Free Library in December 2013 to become the Rosenbach of the Free Library of Philadelphia.
Philadelphia added nearly 400 wage and salary jobs in the arts between 2011 and 2012.

DOWNTOWN ARTS & CULTURAL ORGANIZATIONS, 2013

Midtown Manhattan
- 18.9 million
- 6.0 million
- 5.6 million
- 4.3 million
- 9.5 million
- 4.6 million
- 3.4 million
- 114

Center City Philadelphia
- 409

Lower Manhattan
- 348

Downtown Washington, DC
- 330

Downtown San Francisco
- 242

Downtown Chicago
- 236

Downtown Boston
- 226

Downtown Seattle
- 114

Source: National Center for Charitable Statistics DataWeb, provided by Greater Philadelphia Cultural Alliance
### ARTS & CULTURAL ORGANIZATION ANNUAL ATTENDANCE

#### Performing Arts Organization Attendance

<table>
<thead>
<tr>
<th>Organization</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kimmel Center*</td>
<td>600,137</td>
<td>663,684</td>
</tr>
<tr>
<td>Walnut Street Theatre</td>
<td>363,000</td>
<td>365,000</td>
</tr>
<tr>
<td>Arden Theatre Company</td>
<td>110,074</td>
<td>118,458</td>
</tr>
<tr>
<td>Pennsylvania Ballet</td>
<td>87,555</td>
<td>76,470</td>
</tr>
<tr>
<td>Philadelphia Theatre Company</td>
<td>63,117</td>
<td>58,481</td>
</tr>
<tr>
<td>Opera Philadelphia</td>
<td>51,847</td>
<td>56,242</td>
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<tr>
<td>The Wilma Theater</td>
<td>43,671</td>
<td>30,230</td>
</tr>
<tr>
<td>FringeArts</td>
<td>40,000</td>
<td>28,000</td>
</tr>
<tr>
<td>Philadelphia Chamber Music Society</td>
<td>24,400</td>
<td>27,860</td>
</tr>
<tr>
<td>Curtis Institute of Music</td>
<td>19,165</td>
<td>20,475</td>
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</tbody>
</table>

* Includes Kimmel Center Presentations, Broadway Programming, Resident Company, and Commercial/Non-Profit Rental paid attendees.


#### Museum & Attraction Attendance

<table>
<thead>
<tr>
<th>Organization</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberty Bell Center</td>
<td>2,006,157</td>
<td>1,806,494</td>
</tr>
<tr>
<td>Franklin Square</td>
<td>856,630</td>
<td>928,733</td>
</tr>
<tr>
<td>Franklin Institute</td>
<td>894,334</td>
<td>852,139</td>
</tr>
<tr>
<td>National Constitution Center</td>
<td>828,208</td>
<td>809,969</td>
</tr>
<tr>
<td>Philadelphia Museum of Art</td>
<td>898,416</td>
<td>639,810</td>
</tr>
<tr>
<td>Independence Hall</td>
<td>686,788</td>
<td>630,418</td>
</tr>
<tr>
<td>Eastern State Penitentiary</td>
<td>254,623</td>
<td>305,267</td>
</tr>
<tr>
<td>The Barnes Foundation</td>
<td>216,953</td>
<td>305,021</td>
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<tr>
<td>Academy of Natural Sciences of Drexel University</td>
<td>206,175</td>
<td>249,563</td>
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<tr>
<td>University of Pennsylvania Museum of Archaeology and Anthropology</td>
<td>197,374</td>
<td>156,899</td>
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<tr>
<td>Pennsylvania Academy of the Fine Arts</td>
<td>163,963</td>
<td>146,402</td>
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<tr>
<td>Mütter Museum</td>
<td>110,074</td>
<td>124,078</td>
</tr>
<tr>
<td>National Museum of American Jewish History</td>
<td>100,937</td>
<td>91,235</td>
</tr>
<tr>
<td>African American Museum</td>
<td>72,221</td>
<td>79,250</td>
</tr>
</tbody>
</table>

RETAIL
WITH CLOSE TO 300,000 WORKERS, 180,000 RESIDENTS, AND 3 MILLION OCCUPIED HOTEL ROOM NIGHTS IN 2013, CENTER CITY’S GROWING DIVERSITY CREATES A STRONG DEMAND FOR NEW AND EXISTING RETAIL ESTABLISHMENTS.

Affluent residents, high-wage office and healthcare workers, and visitors with substantial disposable income augment citywide customers and college students, generating more than $793 million in retail demand within a one-mile radius of City Hall. As a consequence, more national retailers are choosing to locate in downtown Philadelphia, adding to a highly diversified mix of local proprietors. Recent new entries to the market include Theory, Stuart Weitzman, Michael Kors, Intermix, Nordstrom Rack, and UNIQLO.

The retail occupancy rate in the CBD was 87.7% in 2013, as remaining vacant premises continued to be converted to new uses. While most city centers experienced rising retail rents in 2013, Philadelphia’s Walnut Street was a national leader with a 33.8% increase over the previous year, based on an analysis by Colliers. Available space on Walnut Street has become scarce, driving both national chains and local boutiques to expand onto adjacent streets, broadening Philadelphia’s prime retail district.

To respond to growing retail demand, several major projects are in the pipeline, including PREIT’s redevelopment of The Gallery at Market East, NREA’s mixed-use development across the street, as well as Midwood Investment & Development’s new retail project in the heart of the Walnut Street retail corridor.

Center City is home to 458 full-service restaurants, 310 quick-service establishments, and 327 outdoor cafes and continues to be one of the top restaurant and dining destinations in the country. Nine out of 10 restaurants named in OpenTable’s Top 10 most-booked restaurants in Philadelphia are in Center City. Center City District Restaurant Week, which celebrated its 10th anniversary in September 2013, continues to attract many suburban residents to the downtown, providing a steady flow of customers in what have been traditionally slow dining weeks.

One of the strongest drivers of Center City’s retail growth has been the 13% increase in population between Girard Avenue and Tasker Street from 2000 to 2013. Young renters and first-time home buyers, empty-nesters relocating from the suburbs, and families with children have all chosen to live in Center City to be near work, take advantage of the diverse array of cultural and entertainment offerings, as well as experience a continually expanding restaurant and retail scene. With household incomes averaging $105,081 in 2012 and 75% of residents 25 and older holding at least a bachelor’s degree, downtown’s purchasing power is increasing.

Workers, visitors, and residents continue to generate significant foot traffic on Center City retail blocks. According to Walk Score, Philadelphia is the fourth most walkable U.S. city, as well as the fifth most bike- and transit-friendly city in the country. Taking advantage of these amenities, 62% of Center City residents do not use a car to get to work. While most of Center City’s pedestrian activity peaks during the week around lunchtime and late afternoon, fueled by the presence of both workers and residents, the area between Rittenhouse Square and Broad Street remains animated throughout the weekend and during evening hours. An average of 31,800 daily pedestrians walked along the 1700 block of Walnut Street on Saturdays in the fall.

Center City retail growth also has been supported by the Philadelphia Retail Marketing Alliance, a collaboration of the CCD, City of Philadelphia, Philadelphia Industrial Development Corporation, Philadelphia Convention & Visitors Bureau, Visit Philadelphia, and major downtown retail brokers. The program includes direct outreach, advertising, story placements in trade publications, and a strong online presence [www.PhiladelphiaRetail.com] that positions Center City as an attractive retail location. Available retail spaces can be found online, as well as marketplace data essential to retailers, brokers, and developers.
The 1700 block of Walnut Street continues to attract the highest number of pedestrians, sustaining volumes throughout the seasons and well into the evening hours.
The intersection of 12th and Market Streets attracted the second highest weekday volume of Center City pedestrians in 2013.

The growth of national retailers is a very positive trend, but 79% of Center City retailers are boutiques, independents, or locally owned.

Source: Retail Survey, Center City District
There were 327 outdoor cafes in Center City in 2013.
This dense concentration of employment (203 jobs per acre in the downtown core, compared to densities of 4.7 jobs per acre in the rest of the city and 0.6 jobs per acre in the surrounding suburbs) is made possible by a multi-modal transit system that brings 305,000 passengers downtown each day, by an expanding cohort of bike commuters, and by those who choose to reside in one of the largest and most walkable live-work environments in the country.

The Center City economy weathered the Great Recession in part due to its diversity, shedding a smaller percentage of jobs during the downturn than either the regional or national average. More than 30% of downtown jobs are found in office towers, 21% in public services, 21% in the healthcare and education industries, and 14% in entertainment, hospitality, and retail.

Although Center City has a large concentration of high-skill, high-wage positions, its jobs are for everyone: nearly 30% of downtown workers over the age of 30 hold no more than a high school diploma; another 30% hold associate’s degrees. More than 21% of the Center City workforce, 58,000 workers, is under the age of 30.

Fifty-two percent of downtown jobs are held by Philadelphia city residents, with an average of 25% of the working residents in all neighborhoods outside the downtown employed in Center City. Downtown also provides significant opportunities for suburban residents: nearly 27,000 workers commute each day from Montgomery County, 25,000 from Delaware County, and more than 11,000 from Bucks County. The Delaware River bridges carry an additional 31,000 workers from adjacent New Jersey counties.

Center City’s high-rise office, hotel, and major institutional buildings house some of the largest employers in the region: 42% of the companies (98 establishments) in Philadelphia with 500 employees or more are located downtown. But more than 35% of citywide businesses employing fewer than 20 people are also located between Girard Avenue and Tasker Street, river to river.

Despite a strong concentration of downtown jobs and expanding employment in University City, more than 188,000 Philadelphians (36% of working residents) leave the city each day for work. This number has been increasing by a half percent annually since 2002 and is in part reflective of the low density of jobs outside the city’s two main employment hubs.

Philadelphia still lags behind the region and other major U.S. cities in job creation. Since 1970, Washington, Boston, and New York City have added respectively 25.1%, 18.3%, and 14.5% in total jobs, while Philadelphia has 25% fewer jobs than it held in 1970. All four cities lost approximately 90% of their 1970 level of manufacturing employment. But Philadelphia’s Northeast peers have done significantly better in adding post-industrial jobs.

Most recently, between 2012 and 2013, U.S. job growth was 1.57%; job growth in Philadelphia’s suburbs was 1%; but the rate of growth in the city was just 0.5%, and the city still has 2% fewer jobs than it held in 2001. Philadelphia’s suburbs have also been adding office jobs in the last several years at the same time that Philadelphia has been losing them. While Boston, New York, and Washington, D.C. all have about 30% of their region’s office jobs, Philadelphia only has a 21.2% regional market share. Only leisure and hospitality has been outperforming the suburbs.

The sooner Philadelphia chooses the path of competitive tax policies, the sooner residents will benefit from steadily increasing construction and permanent jobs, declining unemployment and poverty rates, and sustained opportunity for employment in all neighborhoods of the city.
On average, 25% of the working residents of each Philadelphia neighborhood outside of downtown work in Center City.
Among major U.S. cities, Center City has the third largest concentration of citywide jobs located downtown.
Philadelphia’s Leisure & Hospitality employment growth has consistently outpaced the suburbs’ growth in this sector since 2009.
More than 25% of all firms between South Street and Vine Street are small businesses.

### DISTRIBUTION OF PHILADELPHIA FIRMS BY SIZE

<table>
<thead>
<tr>
<th>Geography</th>
<th>1-19 Employees</th>
<th>20-99 Employees</th>
<th>100-499 Employees</th>
<th>500+ Employees</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Center City</td>
<td>25.1%</td>
<td>31.8%</td>
<td>37.5%</td>
<td>33.3%</td>
<td>26.3%</td>
</tr>
<tr>
<td>Extended Center City</td>
<td>10.1%</td>
<td>8.4%</td>
<td>5.5%</td>
<td>8.5%</td>
<td>9.8%</td>
</tr>
<tr>
<td>Bridesburg/Kensington/Richmond</td>
<td>8.1%</td>
<td>8.4%</td>
<td>6.7%</td>
<td>7.7%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Far Northeast</td>
<td>8.3%</td>
<td>10.1%</td>
<td>12.0%</td>
<td>6.8%</td>
<td>8.6%</td>
</tr>
<tr>
<td>Germantown/Chestnut Hill</td>
<td>5.3%</td>
<td>4.4%</td>
<td>4.0%</td>
<td>3.4%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Near Northeast</td>
<td>10.7%</td>
<td>8.1%</td>
<td>5.2%</td>
<td>5.1%</td>
<td>10.2%</td>
</tr>
<tr>
<td>North Philadelphia</td>
<td>6.4%</td>
<td>5.6%</td>
<td>4.1%</td>
<td>4.3%</td>
<td>6.2%</td>
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<tr>
<td>Olney/Oak Lane</td>
<td>5.9%</td>
<td>3.1%</td>
<td>2.3%</td>
<td>6.0%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Roxborough/Manayunk</td>
<td>3.0%</td>
<td>1.8%</td>
<td>2.0%</td>
<td>0.0%</td>
<td>2.8%</td>
</tr>
<tr>
<td>South Philadelphia</td>
<td>5.9%</td>
<td>6.3%</td>
<td>7.9%</td>
<td>10.3%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Southwest Philadelphia</td>
<td>4.0%</td>
<td>4.2%</td>
<td>5.7%</td>
<td>3.4%</td>
<td>4.1%</td>
</tr>
<tr>
<td>West Philadelphia</td>
<td>7.3%</td>
<td>7.8%</td>
<td>7.1%</td>
<td>11.1%</td>
<td>7.4%</td>
</tr>
</tbody>
</table>

Source: County Business Patterns - 2011, U.S. Census Bureau

---

**YEAR-OVER-YEAR EMPLOYMENT CHANGE**

<table>
<thead>
<tr>
<th>Year</th>
<th>Philadelphia</th>
<th>Metro Area Outside Philadelphia</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>-2.83%</td>
<td>1.16%</td>
<td>1.62%</td>
</tr>
<tr>
<td>2005</td>
<td>-3%</td>
<td>1.57%</td>
<td>1.00%</td>
</tr>
<tr>
<td>2006</td>
<td>-2%</td>
<td>0.50%</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>1.16%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>1.57%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>1.00%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>0.50%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Quarterly Census of Employment & Wages, U.S. Census Bureau

---

**Year-Over-Year Employment Growth**

- 2004: -5%
- 2005: -4%
- 2006: -3%
- 2007: -2%
- 2008: -1%
- 2009: 0%
- 2010: 1%
- 2011: 2%
- 2012: 3%
- Jun 2013: 4.3%
**Education Levels of Downtown Workers Age 30+**

- Bachelor’s Degree or Higher: 40.6%
- High School Diploma or Less: 29.6%
- Some College or Associate’s Degree: 29.8%

**Philadelphia and Metro Area Wage & Salary Employment in Select Industries, 2012**

- **Leisure & Hospitality**: 414,214
  - Philadelphia: 111,213 (21.2%)
  - Outside Philadelphia: 303,001

- **Office**: 360,351
  - Philadelphia: 97,126 (21.2%)
  - Outside Philadelphia: 263,225

- **Education & Healthcare**: 340,188
  - Philadelphia: 199,058 (36.9%)
  - Outside Philadelphia: 141,130

- **Transportation & Trade**: 142,367
  - Philadelphia: 35,820 (20.1%)
  - Outside Philadelphia: 106,547

Source: OnTheMap - 2011, Local Employment Dynamics Partnership, U.S. Census Bureau

40.6% of Center City’s workers age 30 and older have a bachelor’s degree or more.

Source: Quarterly Census of Employment & Wages, U.S. Census Bureau
Philadelphia holds approximately 23% of all jobs in the region.

While Washington, D.C., Boston, and New York City have all added jobs since 1970, Philadelphia’s job levels are 25% below what they were 40 years ago.
CENTER CITY PHILADELPHIA IS JUST SEVEN MILES FROM PHILADELPHIA INTERNATIONAL AIRPORT (PHL) AND WITHIN TWO HOURS FLYING TIME FOR 50% OF THE AMERICAN POPULATION. TOTAL PASSENGER TRAFFIC AT PHL INCREASED SLIGHTLY FROM 30.25 MILLION IN 2012 TO 30.50 MILLION IN 2013, WHILE THE VOLUME OF INTERNATIONAL PASSENGERS ROSE FOR THE SEVENTH CONSECUTIVE YEAR, INCREASING 3% OVER 2012 TO 4.47 MILLION.

PHL is served by 30 airlines departing from seven terminals, providing non-stop flights to 87 domestic and 38 international destinations, including the addition of a direct flight to Sao Paulo, Brazil. JetBlue added service in 2013, and US Airways began the process of merging with American Airlines. Two additional international destinations are being added in 2014: Doha, Qatar, and Edinburgh, Scotland.

As the third busiest stop along the nation’s Northeast rail corridor, Philadelphia is linked by high-speed connections to Boston, New York City, Baltimore, and Washington, D.C. Amtrak’s 30th Street Station averaged 12,710 weekday riders in 2013, and total Amtrak ridership in Philadelphia rose to an all-time high of 4.13 million annual passengers.

The number of miles driven by each American dropped in 2013 for the ninth consecutive year. Mirroring the national trend, more residents, employees, and visitors depended on public transportation to arrive in Center City. The average weekday number of passengers using SEPTA, PATCO, and NJ Transit to arrive or move within Center City in 2013 remained at 305,000. SEPTA ridership on lines serving Center City was steady at 284,000 daily passengers, including a 4% increase in passenger trips on the five trolley lines from West Philadelphia.

Philadelphia ranks fifth nationally among cities with a low dependency on the car for commuting to work, according to the 2012 American Community Survey. More than 70% of residents of city neighborhoods outside the downtown who work in Center City use public transportation to get to work, according to responses to CCD’s 2013 Commuting Survey; 9.5% of the respondents said they bike to work at least one day a week. Among managers of major downtown office buildings, 72.7% anticipate needing to provide more bike parking for workers in the coming year.

While overall 60% of Philadelphia residents rely on a car to get to work, only 28% of Core Center City residents commute by car; 44% walk or bike, and another 20% use public transit.

When Governor Tom Corbett signed a $2.3 billion transportation bill in November 2013, transportation infrastructure in Southeastern Pennsylvania got a major boost. This bipartisan commitment to all forms of transport enables SEPTA to fund $350 million in capital projects by 2018, including a more customer-friendly payment system that will accept credit cards, debit cards, smart phones, and SEPTA smart cards. In addition, PennDOT is planning significant investments in bridge replacements on the section of I-676 that passes under Logan Square, as well as at JFK Boulevard and Spring Garden Street.

The City of Philadelphia is undertaking a pilot project to install LED lighting fixtures on the blocks surrounding City Hall. Parking garages at Eighth and Filbert Streets and 16th and Arch Streets are both undergoing major renovations.

In 2013, the CCD completed the installation of bus maps and historic panels at all 92 Center City bus shelters. In September 2014, the CCD will complete the $55 million renovation of Dilworth Plaza, creating a major new gateway to public transit with significant enhancements at the concourse level.
305,000 transit passengers commute each weekday in Center City.

62% of residents of Greater Center City commute to work without a car.

Source: 2013 Commuting Survey, Central Philadelphia Development Corporation
**TRANSPORTATION INFRASTRUCTURE INVESTMENTS IN CENTER CITY**

<table>
<thead>
<tr>
<th>Type</th>
<th>Project Name</th>
<th>Organization</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transit</td>
<td>Bus Shelter Maps and Historic Panels</td>
<td>Center City District</td>
<td>2013</td>
</tr>
<tr>
<td></td>
<td>Dilworth Plaza Renovation</td>
<td>Center City District</td>
<td>2014</td>
</tr>
<tr>
<td></td>
<td>Real-time Information Display Pilot</td>
<td>Center City District and SEPTA</td>
<td>2014</td>
</tr>
<tr>
<td></td>
<td>New Payment Technologies</td>
<td>SEPTA</td>
<td>2015</td>
</tr>
<tr>
<td></td>
<td>PATCO Train Overhaul Project</td>
<td>DRPA</td>
<td>2015</td>
</tr>
<tr>
<td></td>
<td>PATCO Track Work</td>
<td>DRPA</td>
<td>2016</td>
</tr>
<tr>
<td>Bicycle and Pedestrian</td>
<td>Schuykill Banks Boardwalk Trail</td>
<td>Schuykill River Development Corp.</td>
<td>2014</td>
</tr>
<tr>
<td></td>
<td>Spring Garden Connector</td>
<td>Delaware River Waterfront Corp.</td>
<td>2014</td>
</tr>
<tr>
<td></td>
<td>LED Pedestrian Lighting Project</td>
<td>City of Philadelphia</td>
<td>2014</td>
</tr>
<tr>
<td></td>
<td>Bikeshare</td>
<td>City of Philadelphia</td>
<td>2015</td>
</tr>
<tr>
<td></td>
<td>Reading Viaduct - Phase 1</td>
<td>Center City District</td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td>Ben Franklin Bridge - ADA Ped/Bike Ramp</td>
<td>DRPA</td>
<td>TBD</td>
</tr>
<tr>
<td>Vehicular Access</td>
<td>Street Repaving - Southeast Quadrant</td>
<td>City of Philadelphia</td>
<td>2013</td>
</tr>
<tr>
<td></td>
<td>8th &amp; Filbert Street Garage Renovation</td>
<td>Philadelphia Parking Authority</td>
<td>2015</td>
</tr>
<tr>
<td></td>
<td>Spring Garden Street Bridge Rehabilitation</td>
<td>PennDOT</td>
<td>2015</td>
</tr>
<tr>
<td></td>
<td>JFK Bridge Reconstruction and Bike and Pedestrian Connection at 22nd St.</td>
<td>PennDOT</td>
<td>2016</td>
</tr>
<tr>
<td></td>
<td>I-676 Vine St. Expressway - Bridge Superstructure Replacements, 18th - 22nd St.</td>
<td>PennDOT</td>
<td>2017</td>
</tr>
<tr>
<td></td>
<td>Autopark at JFK Plaza</td>
<td>City of Philadelphia</td>
<td>TBD</td>
</tr>
</tbody>
</table>

Source: SEPTA, City of Philadelphia, PennDOT, Delaware River Port Authority, Philadelphia Parking Authority, & Schuykill River Development Corporation

**AMTRAK RIDERSHIP AT 30TH STREET STATION, 2013**

- Annual ridership: **4,125,503**
- Average weekday ridership: **12,540**

Source: Amtrak

**PHILADELPHIA INTERNATIONAL AIRPORT PASSENGERS, 2013**

- Domestic: **26,030,313**
- International: **4,473,799**

Source: Philadelphia International Airport

**AVERAGE WEEKDAY TRANSIT RIDERSHIP IN CENTER CITY, 2013**

- Total Riders: **305,030**
- NJ Transit Buses: 1%
- PATCO: 5%
- SEPTA Trolleys: 8%
- SEPTA Regional Rail: 13%
- SEPTA Bus Lines: 31%
- SEPTA Subway: 42%
- SEPTA Subway: 4%
- Public Transport: 20%
- Taxi: 1%
- Bicycle: 4%
- Walk: 40%
- Car: 28%

Source: SEPTA, PATCO, & NJ Transit

**CORE CENTER CITY METHOD OF COMMUTE TO WORK, 2012**

- Total Workers: **32,676**
- Car 28%
- Public Transport 20%
- Walk 40%
- Taxi 1%
- Bicycle 4%
- Other 1%
- Work from Home 7%

Source: 2008-2012 American Community Survey 5-year Estimates, U.S. Census Bureau

**GREATER CENTER CITY METHOD OF COMMUTE TO WORK, 2012**

- Total Workers: **89,909**
- Car 38%
- Walk 26%
- Public Transport 24%
- Taxi 1%
- Bicycle 6%
- Other 1%
- Work from Home 5%

Source: 2008-2012 American Community Survey 5-year Estimates, U.S. Census Bureau
SUSTAINABILITY
More than 38 persons per acre live in Center City, with densities rising to 63 persons per acre around Rittenhouse Square, compared to 16.7 persons per acre across the entire city and two persons per acre across the 11-county region.

Density means less time and money spent on auto commuting and more chance encounters and business connections on street corners, at sidewalk cafes, and in restaurants. It also produces a smaller carbon footprint per household, based on transportation expenses, energy use, and other consumption, which compares very favorably to the rest of the city and especially to suburban counties in the region.

A pedestrian-friendly downtown, Center City is served by 42 bus lines, 13 regional train lines, five trolley lines, three subways, and by Amtrak’s Northeast Corridor service. Of SEPTA’s 1,400 buses, 632 will be hybrids by May 2014, with an additional 85 clean diesel buses in service by July 2015.

Public-transit use remains at its highest level in over a decade, carrying an average of 305,000 people every weekday into and out of Center City. In addition, 2013 was a record-setting year for 30th Street Station, with 12,710 weekday Amtrak passengers. Residents also benefit from a growing number of car-share options with 158 pod locations, an increase of 6% over 2012. Farmers’ markets continue to thrive throughout Center City, promoting the local food scene and reducing transportation costs. During 2013, more than $2.5 million in sales were reported at 14 different farmers’ markets, including the highly successful Headhouse Square and Rittenhouse Square markets. Local and fresh produce was cultivated in 31 Center City community gardens, and over 28,000 people visited the PHS Pop Up Garden that was located at a development site on South Broad Street from May to October.

Center City now has 8.6 million square feet of workspace in 34 LEED-certified buildings, while an additional 33 downtown buildings received the Energy Star certification for meeting strict energy-efficiency standards. Overall, Philadelphia was ranked 10th in the country for energy efficiency by the American Council for an Energy-Efficient Economy. Between 2010 and 2013, green roof coverage in Greater Center City increased by 177% to 342,642 square feet.
In 2013, the residential recycling rate in Center City reached 25%, while the number of RecycleBank participants reached 12,533.
### LEED-RATED BUILDINGS & OFFICE SPACES IN CENTER CITY (>50,000 SQ FT)

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Street</th>
<th>Building Type</th>
<th>Zip Code</th>
<th>Certification Level</th>
<th>Gross SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comcast Center</td>
<td>1701 John F. Kennedy Boulevard</td>
<td>Commercial</td>
<td>19103</td>
<td>Gold</td>
<td>1,651,820</td>
</tr>
<tr>
<td>Two Commerce Square</td>
<td>2001 Market Street</td>
<td>Commercial</td>
<td>19103</td>
<td>Silver</td>
<td>1,043,098</td>
</tr>
<tr>
<td>One Commerce Square</td>
<td>2005 Market Street</td>
<td>Commercial</td>
<td>19103</td>
<td>Silver</td>
<td>1,022,084</td>
</tr>
<tr>
<td>Pennsylvania Convention Center</td>
<td>1101 Arch Street</td>
<td>Commercial</td>
<td>19107</td>
<td>Gold</td>
<td>916,184</td>
</tr>
<tr>
<td>10 Penn Center</td>
<td>1801 Market Street</td>
<td>Commercial</td>
<td>19103</td>
<td>Gold</td>
<td>721,408</td>
</tr>
<tr>
<td>Five Penn Center</td>
<td>1601 Market Street</td>
<td>Commercial</td>
<td>19103</td>
<td>Certified</td>
<td>708,702</td>
</tr>
<tr>
<td>1835 Market Street</td>
<td>1835 Market Street</td>
<td>Commercial</td>
<td>19103</td>
<td>Silver</td>
<td>686,503</td>
</tr>
<tr>
<td>Strawbridge &amp; Clothier Building</td>
<td>801-823 Market Street</td>
<td>Commercial</td>
<td>19107</td>
<td>Gold</td>
<td>661,216</td>
</tr>
<tr>
<td>777 South Broad Street</td>
<td>777 South Broad Street</td>
<td>Residential</td>
<td>19147</td>
<td>Silver</td>
<td>218,753</td>
</tr>
<tr>
<td>Kimpton Palomar Hotel</td>
<td>117 17th Street</td>
<td>Commercial</td>
<td>19103</td>
<td>Gold</td>
<td>156,650</td>
</tr>
<tr>
<td>Thomson Reuters</td>
<td>1500 Spring Garden Street, 4th Floor</td>
<td>Commercial</td>
<td>19130</td>
<td>Silver</td>
<td>125,000</td>
</tr>
<tr>
<td>Montgomery McCracken Walker &amp; Rhoads</td>
<td>123 South Broad St, 28th Floor</td>
<td>Commercial</td>
<td>19109</td>
<td>Silver</td>
<td>111,346</td>
</tr>
<tr>
<td>The Barnes Foundation</td>
<td>2025 Benjamin Franklin Parkway</td>
<td>Institutional</td>
<td>19103</td>
<td>Gold</td>
<td>102,615</td>
</tr>
<tr>
<td>Curtis Institute of Music, Lenfest Hall</td>
<td>1616 Locust Street</td>
<td>Institutional</td>
<td>19103</td>
<td>Gold</td>
<td>89,185</td>
</tr>
<tr>
<td>Health Professions Academic Building</td>
<td>901 Walnut Street</td>
<td>Institutional</td>
<td>19107</td>
<td>Silver</td>
<td>85,600</td>
</tr>
<tr>
<td>PECO - Christian Street Service Building</td>
<td>830 Schuykill Avenue</td>
<td>Industrial</td>
<td>19146</td>
<td>Gold</td>
<td>70,644</td>
</tr>
<tr>
<td>Connelly House</td>
<td>1212 Ludlow Street</td>
<td>Residential</td>
<td>19107</td>
<td>Gold</td>
<td>65,412</td>
</tr>
<tr>
<td>Friends Center</td>
<td>1501 Cherry Street</td>
<td>Institutional</td>
<td>19102</td>
<td>Platinum</td>
<td>56,565</td>
</tr>
<tr>
<td>The Lift at Juniper Street</td>
<td>101 South Juniper Street</td>
<td>Parking</td>
<td>19107</td>
<td>Certified</td>
<td>51,300</td>
</tr>
</tbody>
</table>

Source: U.S. Green Building Council

### ANNUAL CARBON FOOTPRINT OF AN AVERAGE HOUSEHOLD BY AREA

![Graph showing annual carbon footprint of an average household by area](source)

- **Green roof coverage in Center City** increased **177%** between 2010 and 2013.
Between 2000 and 2013, the population of Greater Center City — from Tasker Street to Girard Avenue, river to river — expanded from 157,782 to 178,316, a 13% increase. The number of new residential units in Greater Center City increased modestly from 2010 and 2012, after falling sharply from 2008 to 2009, due to the effects of the recession. But in 2013, construction activity in Center City jumped to its highest level since the Center City District began tracking construction activity in 1998. Last year, more than 2,000 new residential units came onto the market, a 290% increase over 2012 levels. This was led by the production of 1,703 apartment units but also included a significant number of single-family homes and condominiums in the extended neighborhoods of Center City.

Between 2012 and 2013, total home sales increased by 18% in Greater Center City, from 2,368 to 2,794. The largest increase in sales volume occurred in the Zip Codes 19102 and 19123, where closings were up 25.7% and 36.8%, respectively. Average sales prices were up in both the core (2.3%) and extended (5.4%) areas, a 3.7% overall increase in prices in Greater Center City. Days on the market were down 18% overall.

Average monthly rent for a one-bedroom apartment in core Center City ranged from $1,365 in Zip Code 19107 to $1,902 in Zip Code 19103. Though three of core Center City’s four Zip Codes saw average monthly rent drop slightly, Zip Code 19103, in western Center City, saw a 10% increase. From 2012 to 2013, monthly rent fell 16.8% in Zip Code 19102 to $1,888, still 11.7% higher than 2009 rental rates. Two-bedroom apartment monthly rents in Zip Code 19106 and Zip Code 19103 rose 15.8% ($359) and 16.5% ($366), respectively.

Millennials make up 29.1% of the downtown population (more than twice the national average), while 35- to 54-year-olds comprise 23.3%, and those over 55 constituted 22.9% of Greater Center City residents.

On average, 41% of Greater Center City households are middle income, making between $40,000 and $125,000, while 40% make less than $40,000. Approximately 19% of households make more than $125,000.

More than 40% of residents living between Girard Avenue and Tasker Street work within those boundaries, with 62% able to get to work without using a car.

Center City residents are highly educated: more than 43% of core Center City residents 25 and older held an advanced degree in 2012, while 75% held at least a bachelor’s degree. In the same year, 45% of extended Center City’s 25 and older population held at least a bachelor’s degree — nearly doubling the percentage of college-educated adults since 2000.

While more than 62% of households in the core and 47% of households in extended Center City are one-person households, downtown continues to attract young families, with 18% of households in extended Center City having one or more children under the age of 18.

Since 2000, more than 26,500 children have been born to Center City parents. The 2010 Census documented a 42.3% increase over levels of children under the age of five in Greater Center City, with the largest number living in the extended neighborhoods that are more affordable to younger homeowners. The American Community Survey shows this trend continuing, as the number of children under the age of five increased from 4.8% of the downtown population to 5.1% in 2012.

Restoring funding, confidence, and effective management in Philadelphia’s public schools are essential, not only for the future of Philadelphia’s disadvantaged children, but also for the vitality and continued growth of downtown neighborhoods. Quality public education is the passport to the 21st century economy and key to the growth of the tax base of the entire city.

The CCD’s website KidsInCenterCity.com offers a guide to activities for children, kid-friendly dining and shopping options, and a forum for parents to discuss issues affecting their schools and children.
More than 2,000 units of new residential housing were completed in Greater Center City in 2013.
**GEOGRAPHIC DISTRIBUTION OF IN-PROGRESS RESIDENTIAL UNITS**

<table>
<thead>
<tr>
<th>Location</th>
<th>Apt</th>
<th>Condo</th>
<th>Single Family</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core</td>
<td>1,096</td>
<td>117</td>
<td>23</td>
<td>1,236</td>
</tr>
<tr>
<td>West of Broad</td>
<td>846</td>
<td>7</td>
<td>14</td>
<td>867</td>
</tr>
<tr>
<td>East of Broad</td>
<td>250</td>
<td>110</td>
<td>9</td>
<td>369</td>
</tr>
<tr>
<td><strong>Extended</strong></td>
<td>632</td>
<td>222</td>
<td>535</td>
<td>1,389</td>
</tr>
<tr>
<td>North</td>
<td>335</td>
<td>144</td>
<td>233</td>
<td>712</td>
</tr>
<tr>
<td>West of Broad</td>
<td>90</td>
<td>50</td>
<td>31</td>
<td>171</td>
</tr>
<tr>
<td>East of Broad</td>
<td>245</td>
<td>94</td>
<td>202</td>
<td>541</td>
</tr>
<tr>
<td><strong>South</strong></td>
<td>297</td>
<td>78</td>
<td>302</td>
<td>677</td>
</tr>
<tr>
<td>West of Broad</td>
<td>78</td>
<td>77</td>
<td>185</td>
<td>340</td>
</tr>
<tr>
<td>East of Broad</td>
<td>219</td>
<td>1</td>
<td>117</td>
<td>337</td>
</tr>
<tr>
<td><strong>Greater Center City</strong></td>
<td>1,728</td>
<td>339</td>
<td>558</td>
<td>2,625</td>
</tr>
</tbody>
</table>

Source: Developments Database - Center City District
**CORE CENTER CITY ONE-BEDROOM APARTMENT RENT** (Buildings with 50+ Units)

![Graph of Core Center City One-Bedroom Apartment Rent](chart)

**CORE CENTER CITY TWO-BEDROOM APARTMENT RENT** (Buildings with 50+ Units)

![Graph of Core Center City Two-Bedroom Apartment Rent](chart)

*More than 62% of core Center City households are single-person households.*

**ONE-BEDROOM ASKING RENT PER SQUARE FOOT** (Buildings with Less Than 50 Units)

![Graph of One-Bedroom Asking Rent per Square Foot](chart)

*Source: Integra Realty Resources*

*Source: Kwelia*
**18% of extended Center City households have one or more children.**
On average, **41%** of Greater Center City households are middle income.
### Average Household Income

![Average Household Income Chart]

#### Where Center City Residents Journey to Work

<table>
<thead>
<tr>
<th>Home Neighborhood</th>
<th>Workers Commuting to Jobs in Greater Center City</th>
<th>Workers Commuting to Jobs in University City</th>
<th>Workers Commuting to Jobs in the Balance of Philadelphia</th>
<th>Workers Commuting to Jobs Outside the City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passyunk Square</td>
<td>49.7%</td>
<td>8.2%</td>
<td>19.4%</td>
<td>22.8%</td>
</tr>
<tr>
<td>Old City</td>
<td>49.0%</td>
<td>11.4%</td>
<td>14.0%</td>
<td>25.6%</td>
</tr>
<tr>
<td>Northern Liberties</td>
<td>47.3%</td>
<td>8.8%</td>
<td>18.0%</td>
<td>25.9%</td>
</tr>
<tr>
<td>Fairmount/Spring Garden</td>
<td>44.7%</td>
<td>10.8%</td>
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<tr>
<td>Queen Village</td>
<td>44.3%</td>
<td>11.5%</td>
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<td>Point Breeze</td>
<td>43.7%</td>
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<tr>
<td>Bella Vista</td>
<td>43.3%</td>
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<td>16.3%</td>
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<tr>
<td>Chinatown</td>
<td>43.0%</td>
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<tr>
<td>Logan Square</td>
<td>42.3%</td>
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<td>Washington Square West</td>
<td>41.3%</td>
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<td>Society Hill</td>
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<td>Callowhill/Poplar</td>
<td>40.2%</td>
<td>4.9%</td>
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<td>Pennsport</td>
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<td>6.1%</td>
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<td>Graduate Hospital</td>
<td>39.2%</td>
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<td>Waterfront</td>
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<td>Grays Ferry</td>
<td>32.9%</td>
<td>7.1%</td>
<td>27.5%</td>
<td>32.5%</td>
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</tbody>
</table>

Source: OnTheMap – 2010, Local Employment Dynamics Partnership, U.S. Census Bureau
CENTER CITY DISTRICT
In 2013, more than 3,500 individuals responded to the Customer Satisfaction Survey: 81.1% of respondents who live or work downtown reported seeing CCD’s personnel “most” or “every time” they were in Center City; 65.8% of all respondents described Center City as “much cleaner” than other areas of the city; 79.5% said they “feel safe always or most of the time” in Center City.

These results are achieved by deploying more than 130 uniformed, on-street personnel and supervisors who manually and mechanically sweep walkways, remove graffiti, provide information to pedestrians, and coordinate closely with the Philadelphia Police and other municipal departments responsible for the quality of the public environment.

Most remarkable is the dramatic reduction in serious crimes. In the last two decades, the volume of people downtown each day has increased significantly, as have the number of evening diners and theater attendees. Nonetheless, serious crimes have been reduced by 53% between 1995 and 2013, plummeting from 20.4 incidents to just 9.5 incidents per day; Center City experienced a 10% reduction in the last year alone.

When asked what would enhance the sense of safety, respondents were unanimous in wanting local government to do a more effective job in deterring the impact of aggressive panhandlers. To achieve this, the next Administration will have to return to the balanced policies of the Rendell Administration that combined enhanced services for those in need with effective enforcement of public conduct standards.

The CCD has leveraged $31,077,873 of its own resources to secure another $74,528,238 in foundation, federal, state, city, and private funds to make $105.6 million in total public space enhancements between 1997 and 2013. With work nearing completion of the $55 million Dilworth Plaza renovation, total CCD capital investments will surpass $125 million by year-end.

Optimism about Center City runs quite high among workers, residents, business and property owners, and investors: 81.4% of respondents to the CCD’s Customer Satisfaction Survey believe downtown is heading in the right direction, 30 points higher than their perceptions of the city as a whole.

When asked what physical improvements would most enhance Center City, respondents place “fix deteriorated sidewalks” first and “improve the physical appearance of storefronts and building facades” a very close second – both private property owner responsibilities.

When asked what would make Center City a more competitive place for business, respondents put “reduce the wage tax” first and “improve public schools” a close second.
81.1% of those who work or live in Center City see CCD personnel most of the time or always.

79.5% of downtown workers and residents surveyed said they feel safe always or most of the time in Center City.
PERCEPTION OF SAFETY IN CENTER CITY

I always feel safe in Center City - 16.3%
I feel safe in Center City most of the time - 63.2%
I occasionally feel that Center City is unsafe - 17.2%
I often feel unsafe in Center City - 2.9%
Not sure - 0.3%

Source: Customer Satisfaction Survey, Center City District

SUGGESTED CHANGES TO IMPROVE SAFETY IN CENTER CITY

- Reduce the number of aggressive panhandlers: 17.8%
- Increase visible police deployment: 16.1%
- Decrease the number of vacant and deteriorated buildings: 13.6%
- Add lighting to dark streets: 12.6%
- Decrease the number of people sleeping on the sidewalks: 10.4%
- Better lighting and security at bus stops and train/subway stations: 9.9%
- Install more security cameras on public streets: 7.0%
- Don’t allow bicycles to be on the sidewalks: 6.8%
- Increase visibility of CCD personnel: 3.2%
- Other: 2.7%

Source: Customer Satisfaction Survey, Center City District
CENTER CITY DISTRICT CLEANING & PUBLIC SAFETY BY THE NUMBERS

132 DAILY CLEANERS
62 Concourse Cleaners & Supervisors
53 Sidewalk Cleaners & Supervisors
17 Sidewalk Cleaners & Supervisors on Fee-for-Service Contracts Outside the CCD

DAILY CLEANERS

ALERT PHILADELPHIA AUDIENCE
3,000 Individuals, Businesses, or Organizations Receiving Alerts
132 Alerts in 2013

100+ POLICE OFFICERS & COMMUNITY SERVICE REPRESENTATIVES STAND JOINT ROLL CALL AND COORDINATE DEPLOYMENT

300 PHILADELPHIA CRIME PREVENTION COUNCIL MEMBER ORGANIZATIONS

300 private, institutional, and public-sector law enforcement professionals share information and strategies through the Crime Prevention Council. 3,000 individuals, businesses, and organizations stay current through the Alert Philadelphia system.

SUGGESTED PHYSICAL CHANGES TO IMPROVE CENTER CITY AS A PLACE TO WORK OR LIVE

Source: Center City District

Fix deteriorated sidewalks 26.4%
Improve the physical appearance of storefronts and building facades 26.2%
Improve and maintain more public parks 16.2%
Remove graffiti on street furniture and upper floors of buildings 15.2%
Other 7.0%
Add more street musicians 6.2%
Limit the volume of street musicians and other groups 2.7%

Source: Customer Satisfaction Survey, Center City District
**SUGGESTED CHANGES TO IMPROVE CENTER CITY AS A PLACE TO DO BUSINESS**

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>25.2%</td>
<td>Reduce the wage tax</td>
</tr>
<tr>
<td>24.6%</td>
<td>Improve public schools</td>
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<tr>
<td>13.4%</td>
<td>Reduce the Business Income &amp; Receipts Tax</td>
</tr>
<tr>
<td>10.6%</td>
<td>Less local legislation that adds to the cost of business in the city</td>
</tr>
<tr>
<td>8.9%</td>
<td>Simplify the municipal permitting and approval process</td>
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<td>7.2%</td>
<td>Add more outdoor “hot spots”</td>
</tr>
<tr>
<td>5.9%</td>
<td>Add more bike lanes</td>
</tr>
<tr>
<td>4.1%</td>
<td>Other</td>
</tr>
</tbody>
</table>

**ART IN TRANSIT 4,035**
- 3,459 Banners Installed
- 576 Posters Installed

**LIGHTING 2,298**
- 2,179 Pedestrian Streetlights
- 72 City Hall Lighting - 9 locations
- 20 Lighted Sculptures
- 12 Lighted Parkway Building Facades
- 12 Lighted Avenue of the Arts Building Facades
- 3 Lighted Underpasses

**STREET FURNITURE 171**
- 75 Adjustable Honor Box Corrals
- 45 Fixed (in-ground) Honor Box Corrals
- 26 Bike Racks
- 25 Park Benches

**SIGNS 1,328**
- 433 Pedestrian Directional Signs
- 256 Diskmap Signs
- 248 Transit Portal Signs
- 236 Vehicular Directional Signs
- 92 Bus Shelter Maps
- 63 Parkway Interpretive Signs

**LANDSCAPING 868**
- 764 Trees
- 104 Planters

Source: Center City District
The CCD has invested $105.6 million in capital projects downtown since 1997.
### CENTER CITY DISTRICT CAPITAL INVESTMENTS, 1997-2013

<table>
<thead>
<tr>
<th>Project</th>
<th>Year</th>
<th>CCD Funds</th>
<th>Federal</th>
<th>City</th>
<th>State</th>
<th>Foundations</th>
<th>Other Donors</th>
<th>Total</th>
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<tr>
<td>Center City Streetscape</td>
<td>1997-98</td>
<td>$21,000,000</td>
<td>$5,000,000</td>
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<td>Market East Streetscape</td>
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<td>Office District Lighting</td>
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<td>City Hall Façade Lighting</td>
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<td>$140,000</td>
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<td>Parkway Lighting, Phase I</td>
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<td>3 Parkway Plaza, Phase I</td>
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<td>Sculpture Lighting</td>
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<td>South Broad Lighting, Phase I-IV</td>
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<td>Transit Portal Signs, Phase I-IV</td>
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<td>John F. Collins Park, Phase I</td>
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<td>LED Lighting 21st, 22nd, 23rd Street Underpasses</td>
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<td>Sister Cities Park, Phase I</td>
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<td>John F. Collins Park</td>
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<td>Dilworth Plaza, Design &amp; Construction</td>
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<td>$2,825,340</td>
<td>$12,117,300</td>
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<td>$2,336,500</td>
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<td>Reading Viaduct, Design, Engineering, &amp; Streetscape</td>
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<td>$1,200</td>
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<td>City Hall Lighting Improvement</td>
<td>2012-13</td>
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<td>2013</td>
<td>$46,238</td>
<td></td>
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<td></td>
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<td>$46,238</td>
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<tr>
<td><strong>Total</strong></td>
<td>1997-2013</td>
<td>$31,077,873</td>
<td>$15,433,100</td>
<td>$22,181,400</td>
<td>$18,911,538</td>
<td>$11,150,300</td>
<td>$2,443,600</td>
<td>$105,606,111</td>
</tr>
</tbody>
</table>

Source: Center City District
Since 2000, the population in this area has increased by 24.2%, as Millennials, empty-nesters, and families with children have chosen to live near work and a broad range of dining, cultural, and entertainment offerings. To support this growing demand, between January 2013 and December 2017, more than 5,800 units of housing are projected to be completed.

A total of 13 major development projects of various types were completed in this area in 2013; 17 more were under construction as of April 2014, and 20 are proceeding through the approvals process. All 50 developments are categorized by type and are mapped on pages 72-73.

Of the 50 major Center City developments, 27 are residential/mixed-use and another three are exclusively residential. The remaining developments include five cultural, four public space, three hospitality, two commercial/mixed-use, two government and non-profit institutions, and two eds and med developments, as well as two retail projects.

The $1.2 billion Comcast Innovation and Technology Center, a project proposed by Comcast and Liberty Property Trust, is the largest among the planned developments. This new tower at 18th and Arch Streets will add more than 1.3 million square feet of Trophy office space to the downtown. Comcast has committed to lease 957,000 square feet and has until September to decide if it will lease the entire building.

The $786 million expansion of the Pennsylvania Convention Center in 2011, as well as strong increases in both leisure and non-convention business travel, has created more demand for downtown hotel rooms. To accommodate the growth in overnight visitors, several hotel projects were announced in 2013, including the boutique SLS and Kimpton hotels and a W Hotel and Element by Westin. With the addition of the recently completed Home2 Suites, Center City is expected to have 1,573 new hotel rooms by 2017.

Center City’s growing residential population with average household incomes over $100,000 is spurring several large-scale retail projects, such as PREIT’s redevelopment of The Gallery and NREA’s East Market project. More than 6,12,000 square feet of retail is expected to be added to Center City in the next few years, with a majority of it east of Broad Street, where there is room to accommodate the larger floor plates that big-box retailers prefer.

In addition to the developments map on pages 72-73, readers can download a full-color PDF with renderings and descriptions of all 50 major developments at www.centercityphila.org/developments.
DEVELOPMENTS

DEVELOPMENTS IN CENTER CITY

COMMERCIAL/MIXED-USE
1. Comcast Innovation & Technology Center
2. 8th & Filbert Street Garage

CULTURAL
3. FringeArts
4. Nicholas and Athena Karabots Pavilion at The Franklin Institute
5. Benjamin Franklin Museum at National Historical Park
6. Kimmel Center Renovation - Volver & SEI Innovation Center

HOSPITALITY
7. Museum of the American Revolution
8. W Hotel and Element by Westin
9. Kimpton Hotel at Family Court
10. Home2 Suites by Hilton Philadelphia

GOVERNMENT & NON-PROFIT INSTITUTIONS
11. Philadelphia Family Courthouse
12. Philadelphia Pennsylvania Mormon Temple

MEDICAL
14. CHOP Schuylkill Ave. Phase I

RESIDENTIAL/MIXED-USE
15. SLS International Hotel and Residences
16. The Icon
17. Avenir
18. Shirt Corner
19. 1116-28 Chestnut Street
20. Mellon Independence Center Tower

RESIDENTIAL
21. Eastern Tower Community Center
22. The Sansom
23. The Granary
24. 1919 Market Street
25. 2116 Chestnut Street
27. 229 Arch Street
28. 1601 Vine Street
29. AQ Rittenhouse
30. 2040 Market Street
31. 1900 Arch Street
32. Tower Place
33. Goldtex
34. One Riverside Place
35. Southstar Lofts
36. Rodin Square
37. Walnut Place
38. River Walk Philadelphia
39. 1346 Chestnut Street
40. East Market
41. 2400 South
42. 410 at Society Hill
43. Museum Towers II
MAJOR DEVELOPMENTS IN CENTER CITY BY TYPE & SQUARE FOOTAGE

$4.7 billion total investment
5,808 residential units
1,573 hotel rooms
1,961,600 SF of commercial/mixed-use development
612,133 SF of new retail space

Source: Developments Database, Center City District
INFORMATION SOURCES

Amtrak – www.amtrak.com
Association of University Technology Managers – auutm.net
The Barnes Foundation – www.barnesfoundation.org
Bicycle Coalition of Greater Philadelphia – www.bicyclecoalition.org
Center City District – www.centercityphila.org
Central Philadelphia Development Corporation – www.centercityphila.org
Children’s Hospital of Philadelphia – www.chop.edu
Colliers International – www.colliers.com
CoolClimate Network – www.coolclimate.berkeley.edu
Cushman & Wakefield – www.cushwake.com
Delaware River Port Authority – www.drpa.org
Drexel University – www.drexel.edu
Enterprise Car Share – www.enterprisecarshare.com
Farm to City – www.farmtoacity.org
Federal Aviation Administration – www.faa.org
The Food Trust – www.thefoodtrust.org
The Franklin Flea – www.franklinflea.com
Greater Philadelphia Cultural Alliance – www.philaculture.org
Integra Realty Resources – www.irr.com
Jones Lang LaSalle – www.joneslanglasalle.com
Kwelia – www.kwelia.com
Mayor’s Office of Sustainability – www.phila.gov/green
Mayor’s Office of Transportation & Utilities – www.phila.gov/motu
National Center for Charitable Statistics Database – www.nccs.urban.org
National Center for Education Statistics – www.nces.ed.gov/nces
Newmark Grubb Knight Frank – www.newmarkkf.com
NJ Transit – www.njtransit.com
OnTheMap – www.onthemap.ces.census.gov
PATCO – www.ridepatco.org
Pennsylvania Convention Center – www.paconvention.com
Pennsylvania Department of Health – www.health.state.pa.us
Pennsylvania Department of Transportation – www.dot.state.pa.us
Pennsylvania Horticultural Society – www.phsonline.org
Philadelphia International Airport – www.phl.org
Philadelphia Parking Authority – www.philapark.org
Philadelphia Police Department – www.phillypolice.com
PKF Consulting – www.pkf.com
Schuylkill River Development Corporation – www.schuylkillbanks.org
SEPTA – www.septa.org
Smith Travel Research – www.str.com
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Temple University – www.temple.edu
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Trend Multiple Listing Service – www.trendmls.com
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