

Downtown Phoenix Past, Present & Future



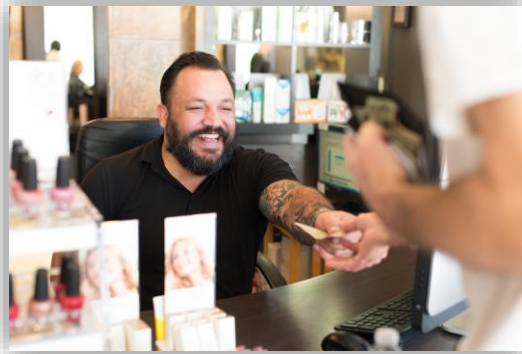
Downtown Phoenix 70 years ago:



Downtown Phoenix 40 years ago:



Downtown Phoenix Today:



Investment

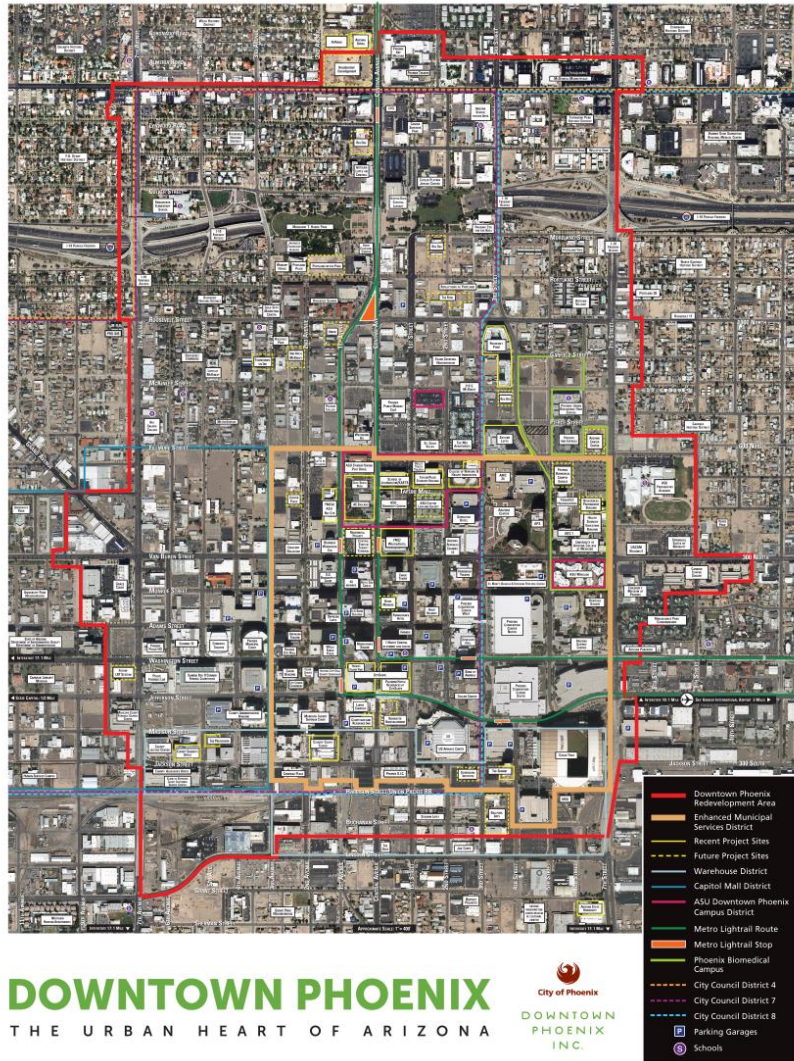
- \$5.5+ billion invested between 2004-July 2018

So how did this transformation take place - from a once vibrant downtown in the 40's, to a virtual ghost town in the 70's, back to a thriving downtown today?

Key Factors in Downtown's Success:

1. High degree of community collaboration between all partners
2. Willingness of the City of Phoenix to make significant public sector improvements in "anchor" projects ie. Arenas
3. Creation and expansion of METRO Light Rail
4. Focus on attracting innovative employment base
5. Focus on improving the pedestrian experience
6. Growth of education and research sectors
7. Growth of residential market
8. Focus on lifestyle including arts, food, music and sports

Downtown Redevelopment District



- Established in 1979
- Approximately 1.7 sq mi
- Redevelopment tools focusing on Downtown investment

DOWNTOWN PHOENIX
THE URBAN HEART OF ARIZONA



DTPHX Downtown Phoenix Inc.
DTPHX.ORG

Enhanced Municipal Services District



Downtown Phoenix Inc.

1 Downtown Information Center

1. AMC Theatres
2. Arizona Center
3. Arizona Latino Arts & Cultural Center (ALAC)
4. Arizona Science Center
5. ASU Downtown
6. Chase Field
7. Children's Museum of Phoenix
8. CityScape Phoenix
9. Civic Space Park
10. Collier Center
11. Comerica Theatre
12. Herberger Theater Center
13. Heritage & Science Park
14. Hilton Garden Inn Phoenix Downtown
15. Historic City Hall/Phoenix Police Museum
16. Hotel Palomar Phoenix
17. Hotel San Carlos
18. Hyatt Regency Phoenix
19. Marriott Residence Inn & Courtyard
20. Orpheum Theater
21. Phoenix Biomedical Campus
22. Phoenix City Council Chambers
23. Phoenix City Hall /The Gallery @ City Hall
24. Phoenix Convention Center North
25. Phoenix Convention Center South
26. Phoenix Convention Center West
27. Renaissance Phoenix Downtown Hotel
28. Phoenix Municipal Court
29. Sandra Day O' Connor Federal Courthouse
30. Sheraton Grand Phoenix
31. St. Mary's Basilica
32. Superior Court Complex
33. Symphony Hall
34. Talking Stick Resort Arena
35. Travelodge Phoenix Downtown
36. US Bankruptcy Court
37. Valley Youth Theatre
38. Wells Fargo History Museum
39. Westin Phoenix Downtown

Downtown Phoenix Inc.

- Umbrella organization created for organizing and galvanizing all Downtown Phoenix partners – dtphx.org
- Organizations under DPI include the Downtown Phoenix Partnership (DPP), the Phoenix Community Alliance and the Downtown Phoenix Community Development Corporation.
- The Business Improvement District (DPP) provides enhanced municipal services to properties in the 90 block business core (Fillmore to railroad tracks – 3rd Ave to 7th St.)
- Phoenix Community Alliance is a business advocacy organization working to create a stronger downtown.
- The Downtown Phoenix Community Development Corporation works to attract housing and community based projects.

Downtown Phoenix Partnership

- Downtown Ambassadors – think of them as “downtown concierges” – provide information and assistance 365 days/year

Phone: 602-495-1500

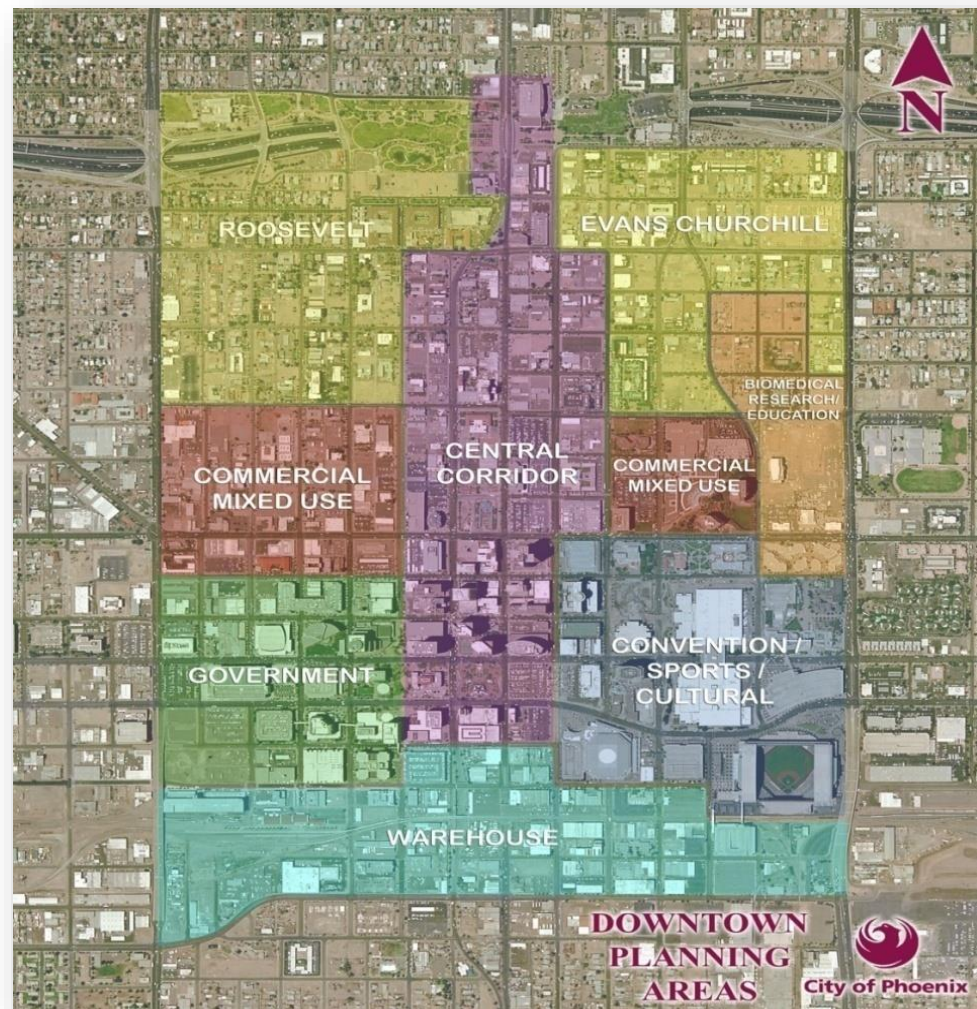
or stop by our Visitor Information Center
at 1 East Washington St, Suite 230



Downtown Strategic Vision and Blueprint

2005-2014 Goals

- Increased residential development
- 600,000 sq.ft. retail and entertainment
- Urban-oriented bioscience and education campuses
- Respect built environment
- Preserve/enhance arts
- Strong transit connections and pedestrian linkages

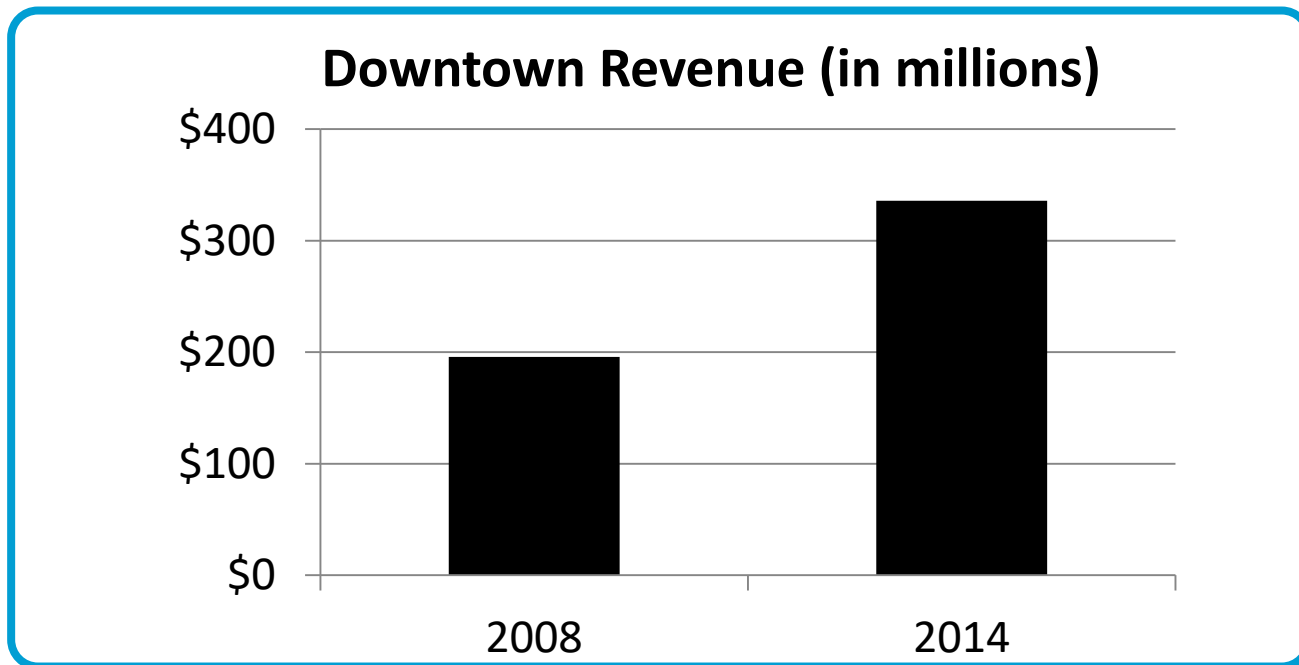


Downtown Phoenix today:

Downtown is in the midst of \$5.5 billion in new investment. Recent highlights include:

- Hotel Expansion: 3,847 total hotel stock with 400+ keys in pre-development
- ASU Downtown Campus Presence: Over 12,000 students and 1,500 faculty and staff on campus + Thunderbird School of Global Management soon to be under construction
- University of Arizona and Northern Arizona University student growth
- Concentration of cultural amenities: Over 12,400 theater seats, museums, concert halls and major sporting venues
- Rise in residential population: 2,951 new residential units built since 2012; 2,165 units under construction; 3,710 units in pre-development
- Large biomedical and research campus (UofA/ASU/NAU)
- 97 net NEW restaurants/bars since the start of 2008
- Expanding metro light rail

From 2008 to 2014 Downtown revenues (retail, hotel & restaurant) increased 74%.



METRO Light Rail and Downtown Transportation

- Hub of METRO Light Rail's 26 mile route
- 8 stations in Downtown area providing connections to 26 miles of network
- Construction on new lines heading West and South starting 2019
- 3,091,805 total Downtown boardings in 2017



GRID Bike Share

- Affordable bikes for rent for hourly, weekly or monthly fares
- Multiple downtown stations and in the Warehouse District



METRO Light Rail T2050

- City Council approved 2 new light rail stations in downtown and closure of Central Avenue between Jefferson and Washington to passenger vehicles
- Completion in 2023 planned to coincide with opening of 2 addition lines
 - WEST TO THE CAPITAL
 - SOUTH TO BASELINE



Downtown Phoenix METRO Light-Rail Commuter Activity*



	<u>Downtown Light-Rail Stop</u>	<u>2017 Boardings</u>
1	McDowell Road & Central Avenue	529,977
2	Roosevelt Road & Central Avenue	367,393
3	Central Station (Van Buren Street on First & Central Avenues)	1,092,240* **Total for two stops at Central Station
4	Jefferson Street & First Avenue	248,611
5	Washington Street & Central Avenue	328,719
6	Third Street & Washington Street	219,500
7	Third Street & Jefferson Street	305,365

Based off average daily boardings*

Downtown Phoenix Pedestrian Counts



Location

Pedestrians Per Hour

Central Avenue & Washington Street	1,265
First Avenue & Washington Street	1,364
First Avenue & Jefferson Street	1,366
Central Avenue & Van Buren Street	747
First Street & Washington Street	1,003
First Street & Adams Street	821
First Avenue & Adams Street	1,233
First Avenue & Monroe Street	711
First Avenue & Van Buren Street	595
Central Avenue & Adams Street	1,135
Central Avenue & Jefferson Street	571
Central Avenue & Monroe Street	995
Second Street & Washington	745
Third Street & Van Buren Street	1,017

Pedestrian Counts are done at random in half-hour intervals between the times of 11:30 and 1:30 on weekdays. Reported totals are the average of at least three half-hour counts at each location. The counts are doubled to provide an hourly total. Updated December 2017



Downtown Phoenix Business
Improvement District

Hospitality/Tourism

- **Sheraton Downtown Phoenix**
Largest hotel in AZ with 1,000 rooms -
opened late 2008

- **Westin Phoenix Downtown**
242 rooms - Opened February 2011

- **Hotel Palomar Phoenix**
242 rooms - Opened June 2012

- **Renaissance Phoenix Downtown**
525 rooms - Upgraded April 2017

- **Hilton Garden Inn**
165 rooms - Opened December 2015

- **Hampton Inn and Suites**
210 rooms – Opened May 2018

- **FOUND:RE**
105 rooms – Opened Nov 2016



- **Luhrs Marriott Courtyard and Residence Inn**

320 rooms - Opened May 2017

- **Cambria Hotel**

127 rooms – Under Construction

- **Coming Soon -A.C. Hotel**

Downtown Convention Center

- Named one of the top-10 convention center facilities in the country
- 900,000 sq. ft. of meeting and exhibit space, including a 312,500 sq. ft. main exhibit hall and a 46,000 sq. ft. ballroom
- Over 221,000 out-of-town delegates hosted in 2016



Phoenix Biomedical Campus

- City-owned 30 acre existing and planned urban medical and bioscience campus in the heart of downtown
- Public uses:
 - U of A College of Medicine Phoenix (618 - Fall 2018 enrollment)
 - U of A College of Pharmacology
 - NAU Allied Health
 - Phoenix Union Bioscience High School
 - Health Sciences Education Building
 - 268,000 SF opened in 2012
 - NAU-Physician Assistant/Physical Therapy programs grew from 29 (2012) to 184 (2015) students per year. Projected 500 by 2019
- U of A Cancer Center 250,000 SF facility construction funded by the City and U of A
- BioScience Partnership-Bldg- opened Spring 2017-250K SF
- Private uses:
 - T-Gen/IGC headquarters
 - St. Joseph's Hospital and Medical Center research laboratories
 - National Institute of Diabetes and Digestive and Kidney Disorders
 - BioAccel life science technology non-profit organization

Phoenix Biomedical Campus - Future

Current Phases of Development

ASU growth continues with an agreement to build 1.5 million sq. ft. of biomedical space within the next few years



Arizona State University- Downtown Campus



ASU Enrollment

Year over Year growth

Total Fall Enrollment:*

2018 – 22,458

2017 – 21,206

2016 – 20,366

2015 – 18,993

2014 – 16,596

2013 – 13,769

2012 – 11,636

2011 – 10,310

2010 – 9,252

*Bachelor's, Master's, Ph.D., Other enrolled at
Ira A. Fulton School of Engineering

Undergraduate Enrollment

Fall 2018

- Computer Science – 2,443
- Software Engineering - 1,268

Fall 2017

- Computer Science – 2,181
- Software Engineering - 1,089



ASU Downtown Phoenix Campus

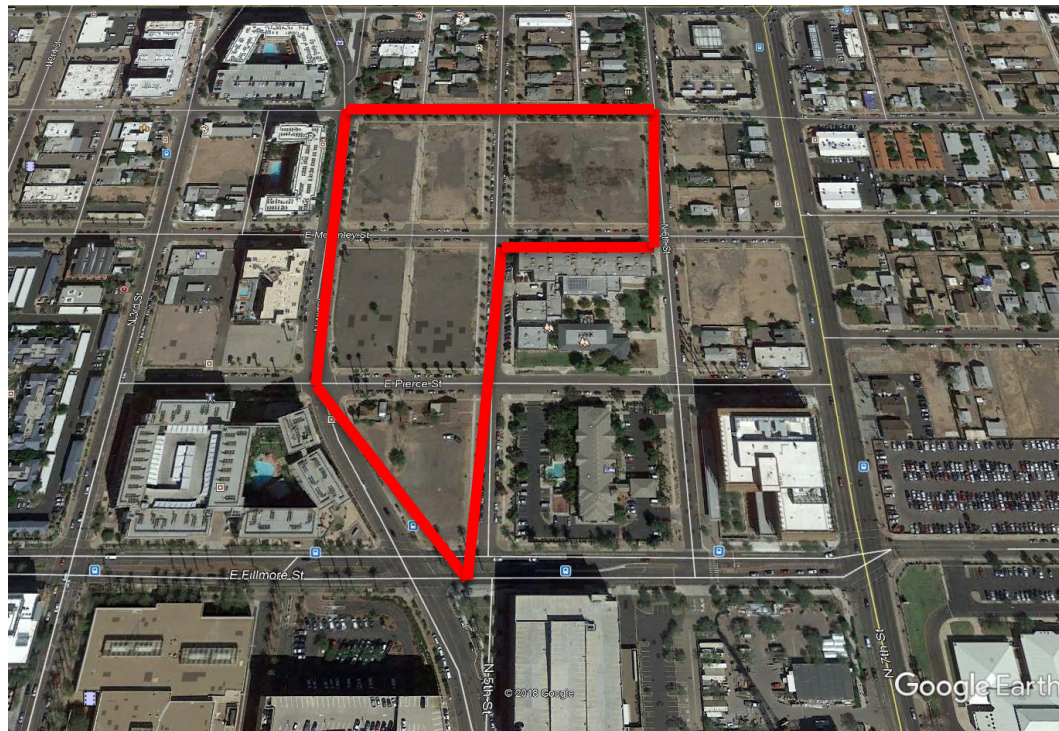
Campus Opened in 2006

- Enrollment
 - 11,700 students in Fall 2017
 - 15,000 expected at full build-out in 2015-20
- Walter Cronkite School of Journalism
 - Opened Aug 2008 to accommodate 1,800 students
 - Arizona Center for Law and Society - Opened 2016
- College of Nursing and Health Innovation
 - 2nd phase, 5-story building opened end of 2009
 - Largest nursing school in US
- Other programs include Public Programs and Criminology
- Taylor Place Student Housing
 - 2 towers accommodating 1,284 students
- O'Connor School of Law
 - Opened Fall 2016
- Thunderbird Global Institute
 - Over 400 graduate students enrolled Downtown

Phoenix Biomedical Campus - Future

Current Phases of Development

ASU growth continues with an agreement to build 1.5 million sq. ft. of biomedical space within the next few years in 7 acres by Wexford Science and Technology



Arts & Culture, Sports, Entertainment

- Chase Field – Arizona Diamondbacks
- Talking Stick Resort Arena – Phoenix Suns, Mercury, Rattlers
- Children’s Museum of Phoenix
- Herberger Theater Center
- Comerica Theater, Orpheum Theater, Symphony Hall
- Arizona Science Center & Create
- Crescent Ballroom, Last Exit Live, The Nash, Valley Bar and The Van Buren are all newest live music venues



Upcoming and New Businesses

Cityscape

Dog Haus Biergarten



Renaissance Towers

Spaces Co-Working

Roosevelt Row

AZ Wilderness Brewery

Collier Center

Taco Bell Cantina

The Churchill

Freak Brothers

Pizza

Pobrecito

Cosas

Portland on the Park

The Larder and Delta

Luhrs Tower

Monroe's Hot Chicken

Welnick

Marketplace

State 48 Brewery

The Stewart

Snooze

Breakfast Eatery

Recent & Future Commercial Development

Development remains on the upswing in downtown with several new hotels, residential towers and adaptive reuse projects recently completed or on the horizon.

CityScape

- Mixed-use project by RED Development at the heart of downtown



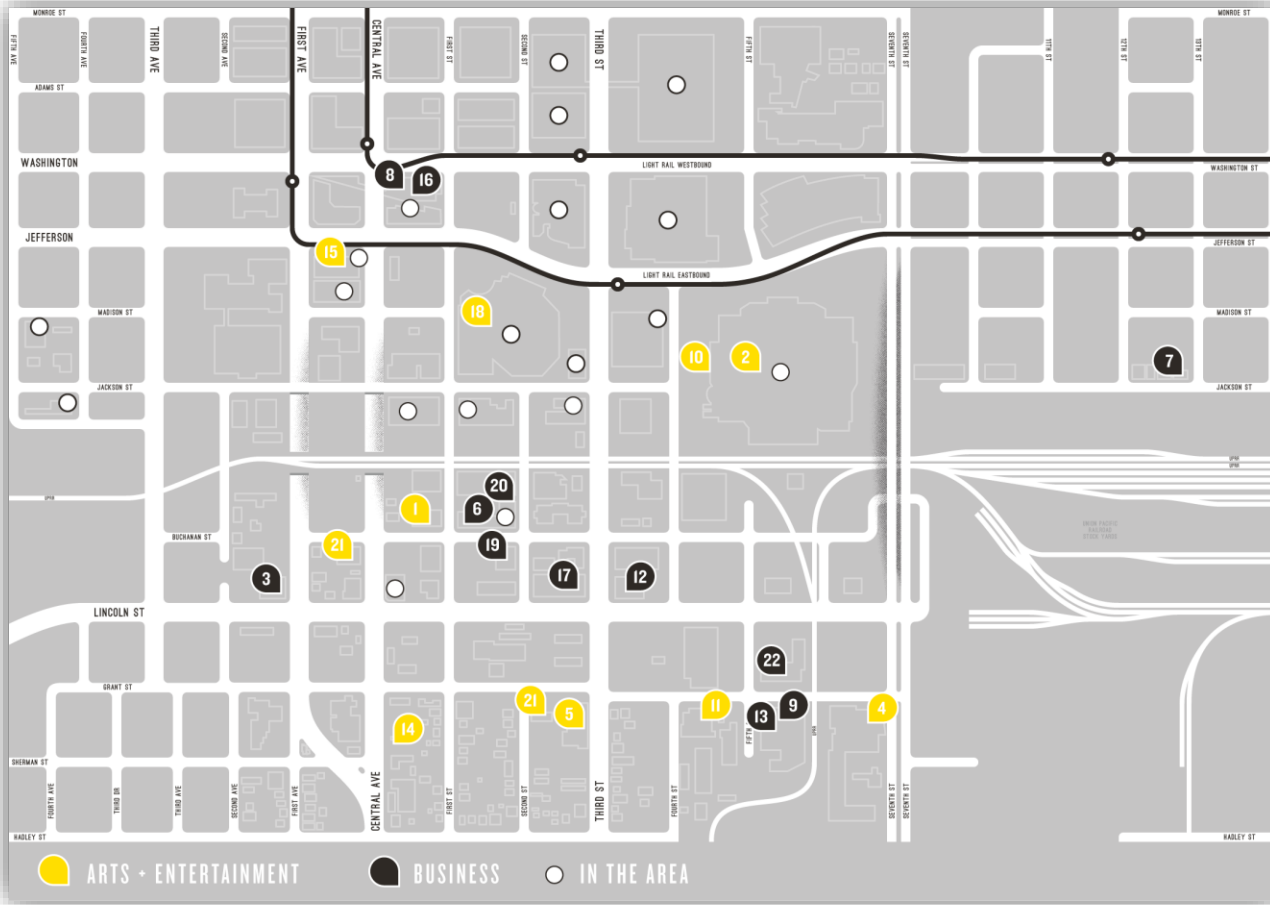
- 600,000 SF office tower opened early 2010; retail opened late 2010; hotel opened June 2012; 224 apartments opened in January 2014
- City-owned park with interactive water feature
- Nearly 250,000 SF retail including CVS Pharmacy, Lucky Strike Lanes, Standup Live Comedy Club, Urban Outfitters, The Breakfast Club and the Arrogant Butcher

Luhrs Marriott Courtyard/Residence Inn



- Dual purpose hotel developed by Hansji Hotels
- 120 room Courtyard by Marriott & 200 room Residence Inn by Marriott
- Exterior design will complement existing Luhrs Tower and Building
- Opened doors May 2017

The Warehouse District



www.phxwd.com

Creative class entrepreneurs are flocking to the Warehouse District to grow their thriving businesses. Ex. [WebPT](#), [R&R Partners](#), architecture firms [CCBG](#) and [Gould Evans + Canary](#),

Galvanize

- 7th campus for the nationally-acclaimed developer education and co-working space
- 117+ companies housed in the Warehouse District inside this reused building



The Van Buren



- 1,900 person capacity live music venue on Van Buren and 4th Avenue
- Excellent example of adaptive reuse possibilities

Hampton Inn



- 210 rooms opened May 2018
- Part of growing base of downtown hotels totaling over 3,800 rooms

The Churchill

- 19 re-purposed shipping containers
- Retail, tacos, cocktail bar, home goods



Block 23

- Expected opening Q4 2019
- Will contain downtown's first urban grocery store and mixed use high-rise.
- Retail and restaurant frontage with an attached residential tower will complete development along Washington and 1st Street



Coming Soon



AZ Center Remodel

- Mainstay in downtown since 1990
- Undergoing a \$25 million remodel with new retail, landscaping and improved street access and frontage

The Cambria

- 127 room hotel under construction at corner of 3rd Street and Portland
- Will include rooftop pool and retail



Lincoln Union

- Former Coors beer distribution factory
- Under renovation to become a 92,000+ sq ft office building



Recent and Future Residential Development

Downtown Phoenix is experiencing an unprecedented rise in residential housing development in recent years.

These new properties offer luxury apartments and economical condominiums amid amenity-rich surroundings.

Union @ Roosevelt

- First Avenue/Roosevelt
- 80 market rate units
- Developed by MetroWest
- Ground floor restaurant & retail
- Opened Summer 2017



Muse Apartments

- Central Avenue/McDowell
- 367 market rate, luxury apartments
- Developed by Lennar Corporation
- Ground floor salon, coffee & retail
- Opened Phase I August 2017



The Oscar

- 2nd St and Portland
- An innovative concept built of retired shipping containers
- Comprised of nine 1 bedroom units, 2 live and work units and 1 commercial unit



Portland on the Park



- Portland & Central-Third Avenues
- 149 luxury condominiums from 745 to 2,300 square feet
- Developed by Habitat Metro

Alta Fillmore

- SE corner of 7th Ave & Fillmore St
- 224 unit apartment complex by Wood Partners
- Opened phase I November 2016



ArtHaus



- First Avenue near Central & McDowell
- 25-unit project designed to take advantage of the artistic amenities in the neighborhood
- Opened Summer 2016

En Hance Park



- 2nd Street & Moreland, south of Hance Park
- Sencorp began construction in September and is expected to be complete in 2016
- 49 condominiums

Proxy 333



- Fourth Street & McKinley
- By Tilton Development in partnership with Goodman Real Estate
- 118-mid-rise-apartment complex featuring 10 ground floor live-work units

Illuminate & Linear



- Two multi-family projects at 3rd Street and Roosevelt
- Illuminate has 111 apartments
- Linear has 104 apartments



McKinley Row



- Located on NW corner of 4th Avenue and McKinley Street
- 18 single-family units located in the heart of the historic Roosevelt neighborhood

Broadstone Roosevelt



- Located between Roosevelt and Portland Streets and 3rd and 5th Streets
- 316 unit development has almost completed construction and is now leasing

Coming Soon

- Located at Central Avenue and McKinley
- Will have 307 apartments once construction is completed and incorporate historic frontage and glass facades

The Stewart



Coming Soon

- Located at 3rd St. and Pierce
- First of three phases is currently under construction – Phase 1 will deliver 252 rental apartments in a 30-story tower
- Tower will feature a rooftop pool and ground floor retail

The Link PHX



Portrait on the Park



- Located off of 3rd Street and Willetta
- Development is currently under construction and will include 180,000 sf of Class-A office space and 325 apartment units

Coming Soon

- Located on the NE corner of Central and Willetta
- Development is currently under construction and will complete as a 5-story, 220-unit mixed-use apartment project

Circa on Central



The Battery



- Located between 3rd – 4th Streets and Buchanan
- Development is under construction and will deliver 276-units of market-rate apartments and ground-floor commercial spaces

Coming Soon

- Located on corner of Polk and Central Avenue
- Development plans to break ground by Q1 2019 for a 23-story apartment tower with ground floor retail
- 230 units with high-end amenities including a rooftop deck

Palmcourt Tower



Kenect Phoenix



- Upcoming 30 story high-rise, 350-unit apartment tower located at 5th Street and Van Buren

Adaptive Reuses

1st Street and Buchanan

- 25,000 sq. ft. warehouse converted into creative office/event space for Scientific Technologies Corporation



R&R Partners

- Second & Buchanan Streets
- R&R Partners, a nationally recognized advertising agency, moved into this 1926's 25,000 sf grocery warehouse
- **250,000 SF in rehab in warehouse district**

Adaptive Reuses



Scheduling Institute

- Former Jackson & 3rd Streets restaurant
- West Coast HQs for the Scheduling Institute, the World's largest dental training company
- The 20,000 sq. ft. building retains the original brick facade

Gracie's Tax Bar

- Built in the 1950s and formerly held an accounting firm before sitting vacant
- Now the home of a new neighborhood bar after extensive restoration



Adaptive Reuses



Welnick Arcade Marketplace

- Van Buren St & Third Ave
- The 1927 Spanish Colonial style Welnick Marketplace has completed renovations
- 11,000+ sf of restaurant and retail space
- The new building exposes garage-style doorways
- State 48 brewery leased and is currently under construction



Adaptive Reuses



The Lincoln Union

- 475 E. Lincoln St
- Former Coors distributing facility located in the heart of the Warehouse District
- 92,000+ SF office space available
- Remodel beginning July 2018



New Employers



doubledutch

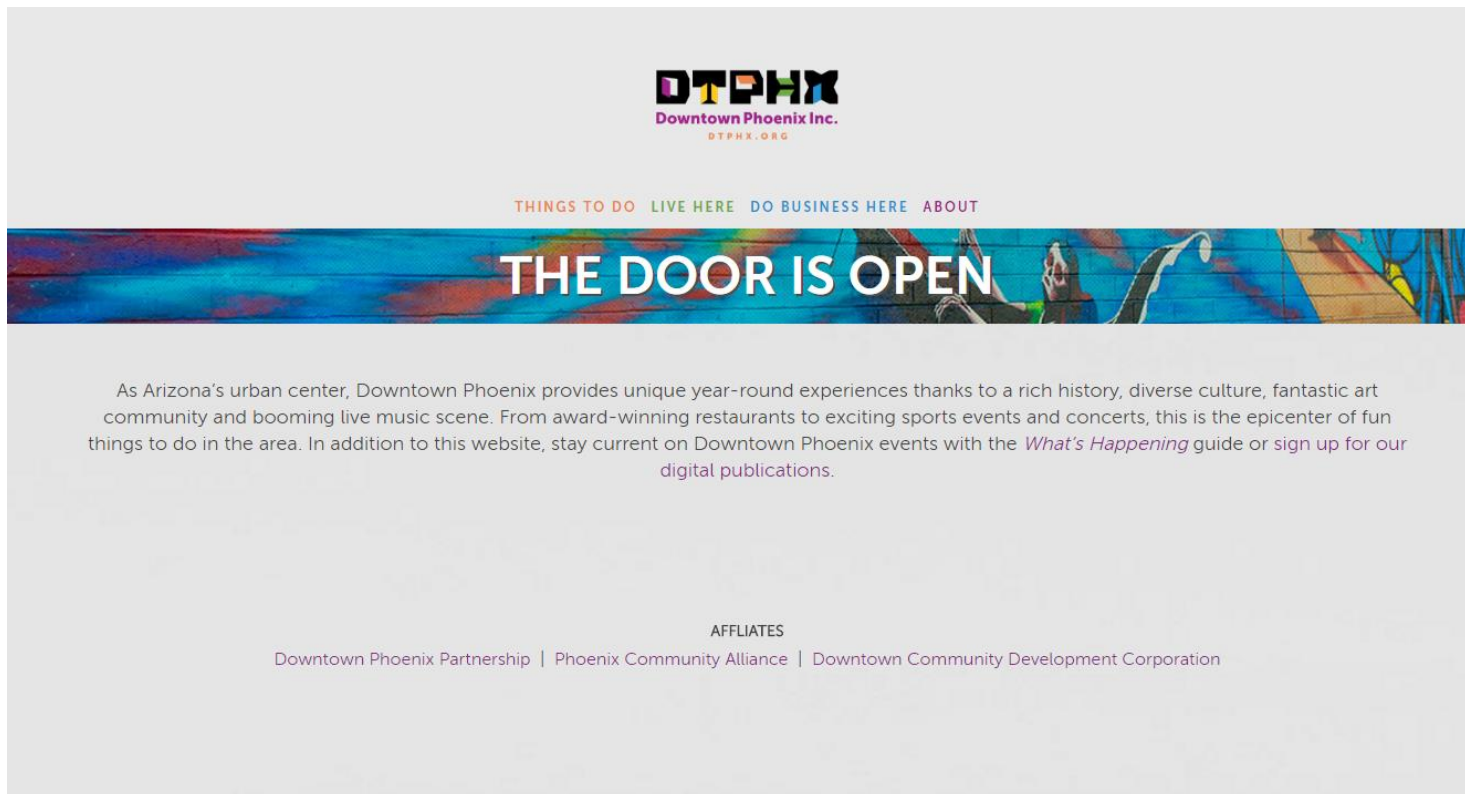


Downtown Phoenix: Our Focus for the Future

- More people – residents & employees
- Continue to create a true, walkable, livable downtown by attracting more services and retail, street level ambiance and experiences, increased shade, etc. This all works together to create a true community feel
- Continue to add more trees and artistic elements
- Critical expansion of light rail with downtown as the hub begins 2019
- Involvement of the local community and proactive, continual outreach about the positive changes in downtown

THANK YOU FOR YOUR TIME! FOR MORE INFO PLEASE VISIT:

www.dtphx.org



The screenshot shows the homepage of Downtown Phoenix Inc. At the top center is the logo for DTPHX, with "DTPHX" in large, bold, black letters and "Downtown Phoenix Inc." in smaller purple text below it, and "DTPHX.ORG" in small orange text at the bottom. Below the logo is a navigation menu with four items: "THINGS TO DO" (orange), "LIVE HERE" (green), "DO BUSINESS HERE" (blue), and "ABOUT" (purple). Below the navigation is a large banner image with a colorful, abstract background. The text "THE DOOR IS OPEN" is written in large, white, bold letters across the center of the banner. Below the banner is a paragraph of text: "As Arizona's urban center, Downtown Phoenix provides unique year-round experiences thanks to a rich history, diverse culture, fantastic art community and booming live music scene. From award-winning restaurants to exciting sports events and concerts, this is the epicenter of fun things to do in the area. In addition to this website, stay current on Downtown Phoenix events with the *What's Happening* guide or sign up for our digital publications." Below the paragraph is the word "AFFILIATES" in small black text, followed by a list of three organizations: "Downtown Phoenix Partnership | Phoenix Community Alliance | Downtown Community Development Corporation".