d o w n t o w n **SANDIEGO** PARTNERSHIP



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A LETTER FROM OUR CEO & CHAIR

To our members, friends, and community,

The Downtown San Diego Partnership has been in the business of championing all things Downtown for more than 25 years. As we navigate the journey of recovery for our urban center alongside our colleagues from across the country, we are fortunate to be able to look back on a year defined by commitment to the neighborhoods that make Downtown San Diego special and a thoughtful exploration of how we prepare for the bright future ahead. We have never been more optimistic about that future knowing it is in the hands of your Downtown Partnership team and so many of our friends and stakeholders.

Over the past 12 months we have helped Downtown become greener and more resilient with the addition of more than 100 trees to our urban canopy. We have added joy, color, and whimsy with the completion of 11 murals. And we continued to be there for our neighborhoods through 1.8 million pounds of trash collection, 10,000 instances of graffiti removal, and 30,000 hospitality visits to serve the Downtown Property and Business Improvement District, otherwise known as Clean & Safe.

We have seen unprecedented collaboration by our local leaders to address the systemic challenges faced by our unsheltered neighbors. Thanks in no small part to the dedication and advocacy of our team. And we have seen that same team make more than 2,500 connections with those who are living on our streets and sidewalks. Connections that build the trust needed to start on the path to stability and safety.

We have seen our staff count grow as we find new strategic ways to serve our mission. And we have entered a multi-year diversity, equity, and inclusion process to ensure our organization contributes positively to our goal of creating a Downtown that is welcoming for all.

We have invested in new ways to tell Downtown's story with launch of the Downtown Innovation Center and the data that will fuel it in our Downtown Demographics Study. Through that research, we confirmed that Downtown is well positioned for the future when it comes to our talent pool, our lifestyle, and so many other great things about our urban neighborhoods. We also gained further insight into the opportunities we have to make Downtown even better. We invite you to explore more about those findings, the state of Downtown, and the accomplishments of the team on behalf of our residents, property owners, businesses, and visitors within this report.

Through it all we have been fortunate to have the unwavering support of our members, with a retention rate of more than 98%, and our Board of Directors, allowing us the stability to find new, creative ways to provide value and serve our shared mission. Our deepest thanks for believing in Downtown, this organization, and the work of our dedicated staff at the Downtown Partnership and Downtown Partnership Clean & Safe.

You will hear it from us a lot over the next year, but we know it is Downtown's time to shine. We invite you to read further about the accomplishments achieved on behalf of our Downtown and look forward to working with you all on this exciting vision for the future in the years and months ahead.

> Betsy Brennan President & CEO Betzy Brennen)

Chanelle Hawken Chair, Board of Directors Manelle Hawken

OUR MISSION

To promote an economically prosperous and culturally vibrant urban center.

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Immediate Past Chair James Lawson Presidio PAG, Inc.

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President & CEO Betsy Brennan Downtown San Diego Partnership



Good ideas aren't enough.

We're here to get to work. We're here to get things done.

BCCA is proud to support the Downtown San Diego Partnership and invites members to engage with us at the new civic collabratory we are organizing with our partners at UC San Diego's Park & Market.



LEARN MORE AT Burnhamcenter.org

2021 DOWNTOWN DEMOGRAPHICS STUDY

In 2021, the Downtown San Diego Partnership commissioned research to better understand who lives, works, and plays in Downtown. The study provides new data on the residential and workforce populations of San Diego's urban core, areas for growth, opportunities for investment and advocacy, as well as a benchmark for the impacts of the pandemic. The data and analysis from this study confirms that Downtown San Diego is primed for its next act and opportunities for even further improvement.



KEY FINDINGS

- Downtown is best positioned for investment from the life science and technology industries
- Diversifying industries will help Downtown build a more resilient urban core
- Downtown is a destination for arts and culture
- There are opportunities to prioritize diversity in Downtown
- Like all of San Diego, Downtown must continue to create opportunities for housing across incomes

HIGHLIGHTS

- 37,000 residents (3x regional growth)
- 60% between 25-54
- 31% between 25-34 (2x regional average)
- 50% lived Downtown 5+ years
- \$116,137 average income
- 50% own a dog
- 52% have a BA degree or higher
- 60% use public transportation to commute to work
- 41% working in management, business, science, or the arts (5% higher than county average)
- 86% working residents would prefer to work Downtown

TOP 3 REASONS FOR WANTING TO LIVE DOWNTOWN

Image: Organization of the sector of the s





UC San Diego

EXTENSION



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ROGRAM

STATE OF DOWNTOWN

MAJOR INVESTMENTS

33 PROJECTS PROPOSED (FY21-22) **15** PROJECTS UNDER CONSTRUCTION (FY21-22)

9

PROJECTS COMPLETED (IN 2021 CALENDAR YEAR)

HOUSING + RESIDENTS



1,938 UNITS UNDER CONSTRUCTION (260 AFFORDABLE)

5% RESIDENTIAL VACANCY RATE (AS OF JUNE 2022) **1,120** AFFORDABLE UNITS PROPOSED OR UNDER CONSTRUCTION (FY21-11)

EMPLOYMENT + OFFICE

~70,000

23.6%

(AS OF JUNE 2022)

~49,000 NET COMMUTERS

\$34.55

AVAILABLE ASKING RENT/SQ.FT. (AS OF JUNE 2022)

RETAIL

~1,300 TOTAL RETAIL BUSINESSES (AS OF JUNE 2022) **20.54% RETAIL VACANCY RATE** (AS OF JUNE 2022)

BUSINESS INVESTMENT

297 NEW BUSINESSES OPENED (FY21-22) ~2,700 TOTAL BUSINESSES

TRANSPORTATION



OF DOWNTOWN RESIDENTS TAKE PUBLIC TRANSIT BACK.

~63,000

AVERAGE WEEKDAY RIDERSHIP OF BLUE LINE (JAN. 2022-MAY 2022)

HOSPITALITY + ATTRACTIONS



5 AMENITIES COMPLETED

- The Rady Shell at Jacobs Park
- 14th Ave Greenway
- Uptown Bike Lanes 4th & 5th Ave
- MTS Trolley Blue Line Extension
- UC San Diego Park & Market

~25 MILLION TOTAL YEARLY VISITORS (Q1 2021 - Q1 2022)

AMENITIES UNDERWAY

- East Village Quarter Park
- East Village Green
- IQHQ's RaDD Park
- The Campus at Horton Park Space
- Waterfront Park Enhancements
- Children's Park
- Greenway Projects
- Jacobs Music Center at Symphony Towers Renovation

QUESTIONS? CONTACT US AT WORK@DOWNTOWNSANDIEGO.ORG

SOURCES:

- Downtown Development Tracker
- City of San Diego Urban Division
- Urban Strategies Group
- CoStar Group

- San Diego Tourism Authority
- San Diego Metropolitan Transit System
- City of San Diego Master Business Listing
- Downtown Partnership Downtown Demographics Study



EXPERIENCE MATCHDAY AT TORERO STADIUM

HOME MATCHES

EAGUE

LEAG

vs. COLORADO SPRINGS vs. RIO GRANDE VALLEY vs. SAN ANTONIO FC MON. JUL 18 | 7:00PM SAT. JUL 23 | 7:00PM SAT. AUG 6 | 7:00PM vs. NEW MEXICO UNITED

vs. MONTEREY BAY FC vs. OAKLAND ROOTS SC vs. PHOENIX RISING FC SUN. OCT 9 | 3:00PM WED. AUG 10 | 7:00PM WED. AUG 24 | 7:00PM SAT. SEP 17 | 7:00PM



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> TO DISCUSS YOUR NEXT PROJECT, CONTACT: Cecilia Kucharski, San Diego Regional Executive cecilia.kucharski@webcor.com

> > webcor.com #1037217 A, B, C-8, C-9

Innovation That Fuels Discovery

The SDSU Mission Valley Innovation District will be a dynamic hub of technology, research and entrepreneurship that fuels discovery and propels economic growth in San Diego.

SDSU.edu

Regional Executive Webcor com San Diego State University 17 A, B, C-8, C-9

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PROJECTS INITIATED ECONOMIC PROSPERITY



INTRODUCING THE DOWNTOWN INNOVATION CENTER

In January 2022, the Downtown Partnership launched the Downtown Innovation Center, the premier resource to introduce Downtown as the right-choice location for future growth and opportunity in the San Diego region. This tool filled a critical need to present a consistent and unified message about the Downtown market for prospective tenants, customers, investors, and the community at large. Using the incomparable Liquid Galaxy platform, visitors explore the unique story of Downtown through exciting projects under development and redevelopment, Downtown's labor pool and demographic data, available office space, tenant mix and more. Learn more at createthefuturesd.com.

Since its launch, the Downtown Innovation center has welcomed more than 50 groups to explore what Downtown San Diego has to offer and added more than 190 contacts to its interest list.

Thank You to Our Sponsors:

COMMERCIAL ENHANCEMENT CLEAN & SAFE

UnionBank CBRE COX

THE DATA FUELING DOWNTOWN'S BRIGHT FUTURE

You've heard of Downtown San Diego's perks. The sunshine. The ocean. The active lifestyle. But what is it that really gives Downtown that "something special?" With the help of our partners, the Downtown Partnership set out to answer that question through much needed and sought-after data.

In April 2022, the organization released the findings from the 2021 Downtown Demographics Study in which residents, investors, and decision-makers can learn more about the building blocks for a bright future that can be found at this coming together of the waterfront and urban living.



Led by the San Diego Regional Economic Development Corporation (EDC) in coordination with UC San Diego Extension's Center for Research and Evaluation, this study provides new data on the residential and workforce populations of San Diego's urban core, areas for growth, opportunities for investment and advocacy, as well as a benchmark for the impacts of COVID-19. The data and analysis from this new study confirms that, despite a global pandemic that posed difficult challenges for urban metros across the nation, Downtown San Diego is primed for its next act and opportunities for even further improvement.

You can find additional demographics study report findings on page 4 of this report.

PRIORITIZING DIVERSITY, EQUITY, AND INCLUSION

In the summer of 2021, the Downtown Partnership conducted its first Vendor Diversity Study to identify equity gaps and opportunities in the current FY Clean & Safe contracts. The independent study showed that 31 percent of Clean & Safe contract dollars from March 2018 through February 2021 went to minority- and women-owned firms (MBE/WBEs). While that number equals or exceeds what might be expected from the availability of MBE/WBEs for these contracts in the region, we're committed to increasing this percentage even further through the identification of additional diverse vendors.

Organizational focus on DEI doesn't stop there. In 2021, we partnered with Global Bridge Builders to embark on a three-year diversity, equity, and inclusion process. This work will assess where the DSDP currently is and assist in the creation of a strategic plan that will be measured through five key competencies: Leadership, Communications, Organizational Processes, External Relationships, and Systems Criteria/Process Management. The goal of this effort is to help create a Downtown that is welcoming for all, starting with our own organization.

31%

of Assessed C&S Contracts Spent with Minority- and Women-Owned Firms

Did you know we hosted our first "Discovering Downtowns" economic development trip this year? Reserve your spot for our next stop in 2023 - Nashville!

1151





RESULTS

- >200,000 social media impressions
- Nearly 200 giveaway submissions
- Two on-site interviews
- Dozens of local businesses
 featured

TOTAL TREES PLANTED - 101



MONEY RAISED - \$90,597

PROJECTS INITIATED CULTURAL VITALITY

SUMMER IN THE CITY

Encouraging Visitation and Vibrancy

With the reopening of San Diego in mid-June of 2021, the Downtown Partnership set out to let everyone know that San Diego's urban neighborhoods were open for business with the launch of the Summer in the City campaign. The Downtown Partnership team researched local events, family-friendly activities, outdoor excursions, and unique experiences to host on a refreshed virtual community calendar. Additionally, the organization partnered with local businesses to run a giveaway of items to encourage visitors to return and residents to explore. This effort was promoted on social media as well as local broadcast stations with the goal of reigniting the vibrancy that visitors and residents bring to Downtown's urban neighborhoods.

GROW URBAN

Creating a Greener Downtown

The streets of Downtown got a bit greener as the Downtown Partnership's Grow Urban initiative embarked on a mission to plant a record number of 100 trees during the month of April in honor of both Earth Day and Arbor Day. Grow Urban, which aims to make Downtown more beautiful, green, and resilient by caring for Downtown's urban tree canopy, finished a successful month of planting with support from our partners at URBAN INTERVENTIONS and a generous donation of trees from Tree San Diego. This month of action alone equaled a total investment of \$150,000 to restore Downtown's urban canopy.

With this effort, the Downtown Partnership exceeded its initial goal of replacing 200 of Downtown's missing street trees. Over the next year, the organization will pursue the next phase of the Grow Urban program by assessing Downtown's urban canopy to identify further missing or dead trees.

"Trees are a foundational element of a livable community and one of the easiest ways to enhance our city streets. Through Grow Urban, we hope people gain a new appreciation for the street tree canopy and its positive impact on the urban community, personal health, and the economic resiliency of our city." – Beth Callender, partner at URBAN INTERVENTIONS.

ADVOCATING FOR WHAT MATTERS TO DOWNTOWN

A Strong Voice for Compassionate, Data-Driven Policy

In the January 2022 count of both individuals sleeping on the street and those estimated to be sheltering in cars and encampments, the Downtown Partnership recorded the highest number of unsheltered people in the Downtown area since 2016. This is part of the data and experiences that emphasized the tremendous need for solutions and resources in Downtown and fueled the organization's advocacy efforts around homelessness over the past year.

While regional elected leaders have taken welcomed steps to collaborate on long-term systems changes and resources, the Downtown Partnership has also been actively advocating for short-term solutions that can bring people into safety and stability – with permanent housing as the ultimate goal.



OTHER WINS FOR DOWNTOWN

- Endorsed 8 Candidates
- Raised >\$18,000 for Candidates and Initiatives
- Advocated for Critical Projects like East Village Quarter and IQHQ's RaDD
- Successfully Advocated to Update the Employment Overlay Zone
- Advocated for East Village Green, Children's Park, and Waterfront Park



OUR PRIORITIES

- Expanding shelter capacity
- Adding safe non-congregate shelter options, like our Safe Villages Pilot
- Increasing outreach with professionals trained to assist those with behavioral health or substance abuse needs
- Deploying resources in a coordinated, compassionate, and data-driven way

DOWNTOWN SAN DIEGO PARTNERSHIP PAC

A voluntary non-partisan political action committee with a focus on candidates and initiatives that further the Downtown Partnership's mission

CHAIR - James Lawson, (Immediate Past Chair) Presidio PAG, Inc.

VICE CHAIR - Chanelle Hawken, Vice President, Government and Public Affairs, Cox California

MEMBERSHIP & EVENTS



TOGETHER AGAIN

This past fiscal year brought the return of in-person events and the additional value that members enjoy through opportunities to connect with the Downtown Partnership's diverse network of professionals, leaders, and businesses driving the bright future of Downtown San Diego. Through the funds raised at sold out signature events including the Installation Celebration, Create the Future Awards, and Golf Invitational, members continued to be instrumental in helping further our mission to advance an economically prosperous and culturally vibrant Downtown.

New Membership Categories for FY23

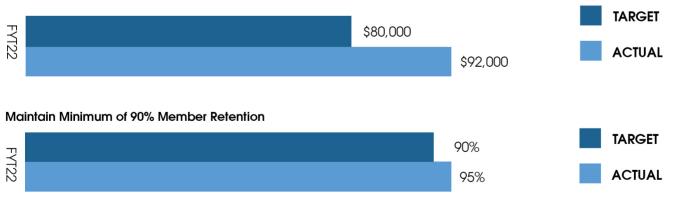
- Retail/Restaurant Enterprise
- Nonprofit Enterprise
- Startup Enterprise
- Individual Enterprise
- Partner Enterprise
- Executive Enterprise
- Founder Enterprise
- City Maker

NEW IN MEMBERSHIP

In 2021, the Downtown Partnership conducted a membership rate study which surveyed other downtown partnerships to compare structure and budget. This research found that our organization is leading the industry in several ways and would also benefit from making a few adjustments focused on driving growth and the implementation of organizational best practices. In response to the study, the Downtown Partnership is implementing five key changes in the new fiscal year, including reassessing membership rates and renaming membership categories among others. These changes will ensure the Downtown Partnership stays on the forefront of membership-based organizations and can provide the best support and opportunities to our valued members.

EXCEEDING REVENUE AND RETENTION GOALS

Generate \$80,000 in New Member Revenue



UNDERREPRESENTED BUSINESS ENTERPRISE MEMBERSHIP

Building upon the pilot program started in FY20, the Underrepresented Business Enterprise Membership continues to foster economic inclusion and provide individuals and businesses with the opportunity to engage with their community, share their voice and vision, and provide expertise. Learn more about membership



A FOCUS ON INFRASTRUCTURE, GOVERNANCE AND GROWTH

During the 2021-2022 fiscal year, the Downtown San Diego Partnership invested resources to improve its finance, human resources, and technology support, providing a solid foundation for sustainability and future growth.

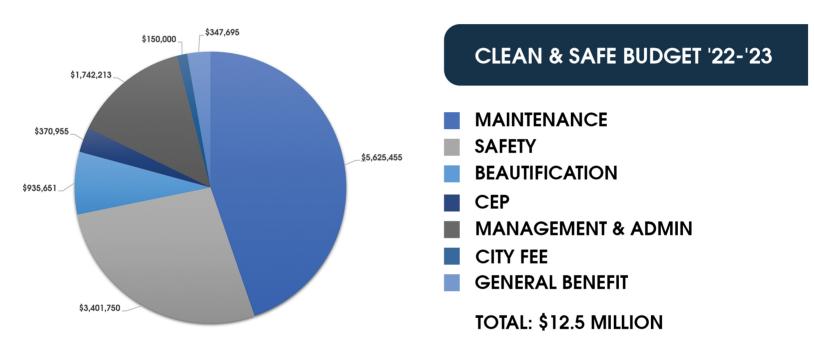
Additionally, transparency and oversight were increased through growth in board committee participation and governance.

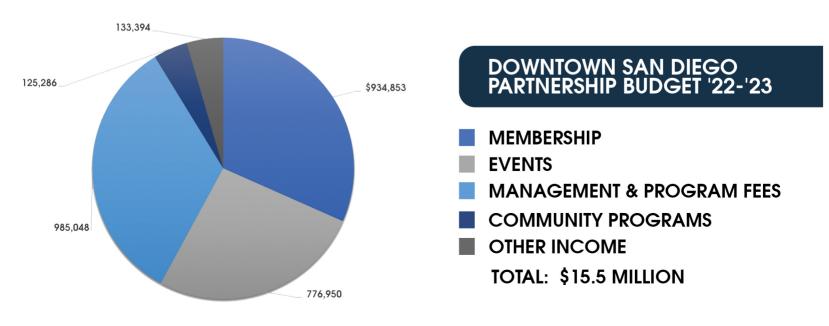
As we look forward to the 2022-2023 fiscal year, the organization is planning for increased membership growth and the development of enhanced services to businesses in the community through a new social enterprise, creating a model for sustainability for years to come.

Highlights:

The Downtown Partnership's FY23 budget includes a 54% increase in expected membership revenue to align with strategic membership growth goals and above expected actuals for FY21-22.

The Downtown Partnership Clean & Safe's FY23 budget includes increases in both the safety and maintenance categories to align with feedback heard from the Downtown community.







FY 21-22 ORGANIZATIONAL PERFORMANCE HIGHLIGHTS

CLEAN & SAFE

MAINTENANCE

Sidewalks Power Washed - 45,000 Graffiti removed - 10,000 Trash Bags Pulled -100,000 Hot Spots Served - 57 - **1**54%

SAFETY

Hospitality Checks – 30,000 Wellness Checks – 38,000 Security Checks – 131,000

BEAUTIFICATION

Murals Installed - 11 Banners Installed - 145 Projects Completed - >20

UNSHELTERED SERVICES

Individuals Reconnected with Support Systems - >380 Street Outreach Contacts - ~2,500 Client Referrals - 173 (shelter + people housed + emergency hotel + DV)

COMMERCIAL ENHANCEMENT PROGRAM

CEP Properties Contacted - 75% Interest List Sign-ups for Downtown Innovation Center - >180 Impressions for Promotion of Downtown Demographics Study - >500,000

DOWNTOWN PARTNERSHIP

HUMAN RESOURCES Average Days to Fill Position – 55 Days – National Average: 42

GOVERNMENT AFFAIRS & ECONOMIC DEVELOPMENT

Endorsed Candidates - 8 Endorsed Policies - 22

MARKETING & COMMUNICATIONS

Average Email Open Rate - 37% - 12% Above Industry Average Average Monthly Website Visitors - >4,000 Earned Media - 25+ stories

Membership & Events - Included on Page 13



FOUNDERS CIRCLE LEVEL MEMBERS

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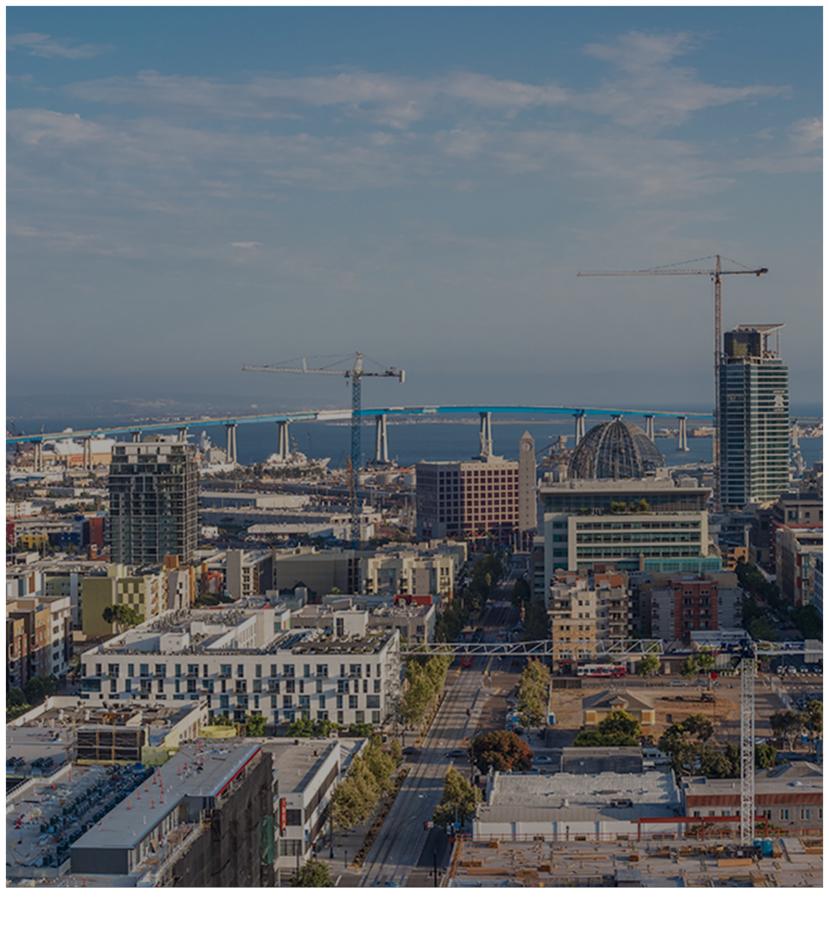
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