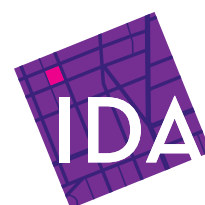




# The Value of U.S. Downtowns and Center Cities

AN IDA STUDY CALCULATING THE VALUE OF DOWNTOWN  
COMPENDIUM - SECOND EDITION

A PUBLICATION CREATED BY  
THE INTERNATIONAL DOWNTOWN ASSOCIATION



INSPIRED LEADERS  
SHAPING CITIES

## ABOUT IDA



### IDA

The International Downtown Association is the premier association of urban place managers who are shaping and activating dynamic downtown districts. Founded in 1954, IDA represents an industry of more than 2,500 place management organizations that employ 100,000 people throughout North America. Through its network of diverse practitioners, its rich body of knowledge, and its unique capacity to nurture community-building partnerships, IDA provides tools, intelligence and strategies for creating healthy and dynamic centers that anchor the well-being of towns, cities and regions of the world. IDA members are downtown champions who bring urban centers to life. For more information on IDA, visit [downtown.org](http://downtown.org).

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The IDA Research Committee is comprised of industry experts who help IDA align strategic goals and top issues to produce high-quality research products informing both IDA members and the place management industry. Chaired and led by IDA Board members, the 2018 Research Committee is continuing the work set forth in the IDA research agenda, publishing best practices and case studies on top issues facing urban districts, establishing data standards to calculate the value of center cities, and furthering industry benchmarking.

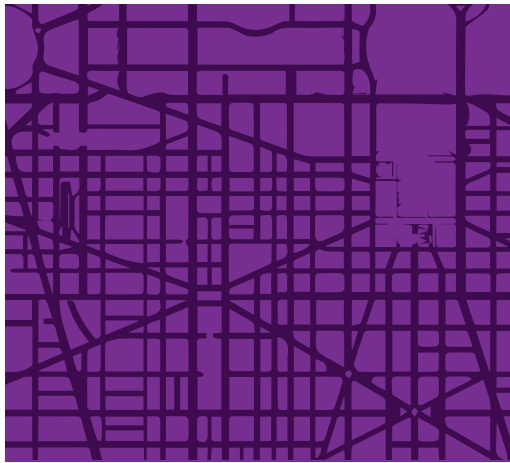
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## THE VALUE OF U.S. DOWNTOWNS AND CENTER CITIES



### Stantec's Urban Places

*Project Advisors for The Value of U.S. Downtowns and Center Cities*

Stantec's Urban Places is an interdisciplinary hub bringing together leaders in planning and urban design, transportation including smart and urban mobility, resilience, development, mixed-use architecture, smart cities, and brownfield redevelopment. They work in downtowns across North America—in cities and suburbs alike—to unlock the extraordinary urban promise of enhanced livability, equity, and resilience.

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# Executive Summary

## A STRONG DOWNTOWN IS CRITICAL FOR A SUCCESSFUL CITY AND REGION.

The *Value of U.S. Downtowns and Center Cities* project focuses on demonstrating the impact and benefits American downtowns and center cities provide all citizens in the community. Informed by IDA's award-winning project, *The Value of Investing in Canadian Downtowns*, this study:

- Establishes a replicable, accessible, standard methodology for IDA to calculate the value of an American downtown.
- Articulates the unique contributions, importance, and multiple benefits of downtown investment for a broad range of relevant stakeholders and audiences.
- Benchmarks the performance of American downtowns and creates a baseline for future data collection.

The study identified five key principles—economy, inclusion, vibrancy, identity, and resilience—and analyzed more than 100 key data points within the principles to quantify the value of a given U.S. downtown. The study relied on both public and proprietary data sources, defining the commercial downtown beyond the boundaries of a downtown development authority or business improvement district. Metrics were calculated by change over time, by square mile, and by share of city and regional value, allowing IDA to begin measuring each downtown against its respective city and region.

Twenty-four downtown urban place management organizations across the U.S. have participated in the study to-date, informing this new industry standard. The 2017 pilot included Baltimore, Charlotte, Grand Rapids, Lancaster, Miami, Norfolk, Pittsburgh, Sacramento, San Antonio, San Francisco, Santa Monica, Seattle, and Wichita. Participants in 2018 are Ann Arbor, Atlanta, Austin, Dallas, Durham, El Paso, Greensboro, Indianapolis, Minneapolis, Oklahoma City, and Tucson. Our analysis of this group of downtowns opened a window on just how much impact downtowns truly have, not only on those who live and work downtown, but also on their respective cities and regions. The findings reveal that each downtown functions as a leading economic driver in each city and region. While small in physical size, downtowns are immensely valuable, diverse, efficient, inclusive, and resilient on multiple levels.

**Economy:** Thanks to the density of economic activity, downtown investment provides a higher level of return per dollar invested than other parts of the city. The findings from the pilot downtowns highlight the economic role that downtowns play as centers of tax revenue generation, employment, and commercial real estate. Given their relatively small size (on average, just three percent of all citywide land), downtowns in this study deliver an average of 16% of the citywide property tax revenue, 42% of hotel tax revenue, and 12% of sales tax revenue. Downtowns contain 11% of the citywide assessed land value, 28% of total employment, and 36% of the city's office space. Downtowns represent economic opportunity and have a built environment that supports future growth. The mix of uses, coupled with ample commercial real estate, positions both downtown and city for continued office, job, and residential growth.

**Inclusion:** Downtowns and center cities provide access to opportunities and essential services for diverse users, positioning them as highly inclusive urban nodes. The downtowns exhibited marked demographic diversity with residents from a wide range of backgrounds. On average, downtown residents are 44% non-white, 29% middle-income, and 47% hold a bachelor's degree or higher. In most downtowns, those between the ages of 18-34, the millennial population, accounted for the largest age group, averaging 46% of residents.

**Vibrancy:** Due to their higher density and expansive user base, downtowns support a vibrant variety of retail, infrastructure, and institutional uses which offer mutually-reinforcing benefits to the region. Study downtowns outpaced their cities in residential growth between 2010 and 2016, growing an average of 27% against the citywide average of 7%. Downtowns are also regional shopping, nightlife, and entertainment centers. The average study downtown contains 14% of all citywide retail, food and beverage businesses, 35% of all hotel rooms, and generates \$53 million in sales tax per square mile (nearly 10 times the citywide average).

**Identity:** Downtowns have intrinsic cultural significance, defining the region's brand by offering historical assets,

culture, recreation, entertainment, and participation in civic activities. A blend of old and new, downtowns provide a high quality of life that attracts employers, investment, visitors, and residents. On average, the study downtowns contain 24 civic and community places, 11 museums, 84 public art installations and 81 historic structures.

**Resilience:** The mixed-use nature of a downtown allows for residential uses alongside commercial, connected by a variety of mobility options. Downtowns in this study consistently and significantly rank higher than their city in Walk Score (88 downtown, 49 city), Transit Score (77 downtown, 44 city), and Bike Score (80 downtown, 53 city). The average pilot downtown contains 5 parks per square mile, providing a multitude of health, environmental, well-being and sustainability benefits. The diversity and density of resources and services in downtown make it inherently better able to rebound from economic, social, and environmental shocks and stresses than other parts of the city and region. For instance, if one area of the market is in decline, the downtown can continue growing in other market areas.

**Downtown Typologies:** Each downtown in the study has its own unique context, and is at different stages of development. Based on the 24 study downtowns, three tiers of downtowns emerged based on average growth in employment, density, population, and assessed value. The charts on the next page show different trends across all five principles in each tier.

## OPPORTUNITIES FOR DOWNTOWNS

**Investment:** Continued public investment in downtown will benefit current infrastructure, residents, and firms, but also generate outsized returns to the greater community. Because of downtown's economic productivity, every dollar invested has the potential to produce much greater returns than investment in less productive areas. To maintain downtown's economic impact, cities will need to continue investing in these areas where the tax revenues support the entire city. With shrinking federal funding, cities will be increasingly reliant on the local economic engines which are increasingly found in the downtown.

**Quality of Life as a Factor in Talent Recruitment and Retention:** As downtown job markets shift even more heavily toward knowledge workers and technology professionals, place management organizations can play a crucial role in attracting and retaining talent by making sure its downtown has the

amenities, qualities of place, and mix of uses these businesses increasingly seek out. The relatively recent jobs-follow-employees model hinges on quality of place and more specifically the quality of walkable urban places where talented knowledge workers are choosing to live. Municipalities have a ready-made vehicle for investing walkable urban places by partnering with their downtown management organization. Not only can they activate public spaces, place management organizations can also champion adaptive reuse of older industrial structures, help transform office spaces for other uses, and help keep pace with the evolving marketplace.

**Equity:** Downtown priorities need to include equitable development and growth that does not displace residents nor exclude workforce opportunities. While place management organizations don't typically set out to address these issues, increasingly they are organizing workforce-training programs, collaborating across sectors to improve offerings for all socioeconomic levels, or they are working to diversify a downtown's tenant mix to provide goods and services for all households. Place management organizations should seize the opportunity to embrace a collaborative approach, engaging community cooperation, public and private leadership, thoughtful planning, and a regulatory climate that encourages strategic, place-based development designed to build community wealth, inclusion and accessibility.

**Access:** As downtowns strive to be inclusive homes for diverse residents and employers, they'll want to consider several questions: *How can they attract more diversity and make it easier for all kinds of people to live, work, and belong? What workforce and middle-income employment and housing strategies have proved most successful? How can they encourage more transportation access, immigrants in the workforce, and jobs at all levels?* Downtowns should continue work to welcome everyone within and outside the community.

## CONCLUSION

Downtowns—and their place management organizations—can bring clarifying leadership to these issues, turning challenges into opportunities. We undertook this study with the goal of creating a product that would empower local leaders to work with the public and private sectors at all levels to encourage investment in and support for downtowns. As this study makes clear, investing in downtown delivers powerful benefits for the city and region.

## Downtown Typologies

Based on the data collected for the *Value of U.S. Downtowns and Center Cities* study, we identified three tiers of downtowns, defined by stage of development. We divided the 24 downtowns that have participated to date into “established”, “growing” and “emerging” tiers based on average growth in employment, residential density, population growth, job density, and assessed value per square mile. It is important to note that downtown geography and demographics served as the sole basis for the tiers and that a small sample size required a conservative approach to generalizations.

### Established Downtowns

- MIAMI
- MINNEAPOLIS
- SEATTLE

AVERAGE OF **6.1%** OF THE CITYWIDE LAND AREA WITH AN AVERAGE ASSESSED VALUE OF **\$29.4 BILLION** (28% OF THE CITY'S TOTAL VALUE) AND ACCOUNTS FOR:

32%	PROPERTY TAX REVENUE
26%	SALES TAX REVENUE
49%	HOTEL TAX REVENUE
14%	CITYWIDE POPULATION
41%	DOWNTOWN RESIDENTS ARE MILLENNIAL

	DOWNTOWN	CITYWIDE
 <b>RESIDENTIAL</b>		
GROWTH AVG. 2010 – 2016	<b>29%</b>	10%
DENSITY RESIDENTS / ACRE	<b>26</b>	12
INCOME MEDIAN HOUSEHOLD	<b>\$57K</b>	\$52K




### EMPLOYMENT

<b>52%</b>	CITYWIDE JOBS
<b>62%</b>	CITYWIDE KNOWLEDGE JOBS
<b>53%</b>	CITYWIDE CREATIVE JOBS
<b>69%</b>	CITYWIDE OFFICE SPACE



<b>49</b>
HOTELS
<b>9,479</b>
HOTEL ROOMS
<b>57%</b>
CITYWIDE HOTEL ROOMS


DOWNTOWN NON-SOV COMMUTE
DOWNTOWN
<b>54%</b>
CITY
<b>36%</b>

WALK SCORE	DOWNTOWN	CITY
	<b>96</b>	<b>73</b>
BIKE SCORE	DOWNTOWN	CITY
	<b>77</b>	<b>68</b>
TRANSIT SCORE	DOWNTOWN	CITY
	<b>98</b>	<b>58</b>

## Growing Downtowns

- ANN ARBOR
- ATLANTA
- AUSTIN
- BALTIMORE
- CHARLOTTE
- DALLAS
- GRAND RAPIDS
- INDIANAPOLIS
- PITTSBURGH
- SANTA MONICA
- UNION SQUARE, SAN FRANCISCO

AVERAGE OF **3.1%** OF THE CITYWIDE LAND AREA WITH AN AVERAGE ASSESSED VALUE OF **\$7.4 BILLION** (11% OF THE CITY'S TOTAL VALUE) AND ACCOUNTS FOR:

- 13%** PROPERTY TAX REVENUE
- 16%** SALES TAX REVENUE
- 51%** HOTEL TAX REVENUE
- 5%** CITYWIDE POPULATION
- 52%** DOWNTOWN RESIDENTS ARE MILLENNIAL

## Emerging Downtowns

- DURHAM
- EL PASO
- GREENSBORO
- LANCASTER (CA)
- NORFOLK
- OKLAHOMA CITY
- SACRAMENTO
- SAN ANTONIO
- TUCSON
- WICHITA

AVERAGE OF **1.7%** OF THE CITYWIDE LAND AREA WITH AN AVERAGE ASSESSED VALUE OF **\$1.5 BILLION** (3% OF THE CITY'S TOTAL VALUE) AND ACCOUNTS FOR:

- 11%** PROPERTY TAX REVENUE
- 4%** SALES TAX REVENUE
- 31%** HOTEL TAX REVENUE
- 3%** CITYWIDE POPULATION
- 41%** DOWNTOWN RESIDENTS ARE MILLENNIAL



### RESIDENTIAL

	DOWNTOWN	CITYWIDE
GROWTH AVG. 2010 – 2016	<b>37%</b>	6%
DENSITY RESIDENTS / ACRE	<b>14</b>	9
INCOME MEDIAN HOUSEHOLD	<b>\$53K</b>	\$55K



### RESIDENTIAL

	DOWNTOWN	CITYWIDE
GROWTH AVG. 2010 – 2016	<b>14%</b>	6%
DENSITY RESIDENTS / ACRE	<b>6</b>	4
INCOME MEDIAN HOUSEHOLD	<b>\$33K</b>	\$47K



### EMPLOYMENT

- 30%** CITYWIDE JOBS
- 32%** CITYWIDE KNOWLEDGE JOBS
- 38%** CITYWIDE CREATIVE JOBS
- 38%** CITYWIDE OFFICE SPACE



- 27** HOTELS
- 6,042** HOTEL ROOMS
- 40%** CITYWIDE HOTEL ROOMS



### EMPLOYMENT

- 17%** CITYWIDE JOBS
- 15%** CITYWIDE KNOWLEDGE JOBS
- 23%** CITYWIDE CREATIVE JOBS
- 25%** CITYWIDE OFFICE SPACE



- 18** HOTELS
- 3,399** HOTEL ROOMS
- 21%** CITYWIDE HOTEL ROOMS



DOWNTOWN  
NON-SOV  
COMMUTE

**44%**

CITY  
**30%**

WALK SCORE



DOWNTOWN **91** CITY **54**

BIKE SCORE



DOWNTOWN **81** CITY **54**

TRANSIT SCORE



DOWNTOWN **80** CITY **49**



DOWNTOWN  
NON-SOV  
COMMUTE

**35%**

CITY  
**15%**

WALK SCORE



DOWNTOWN **82** CITY **37**

BIKE SCORE

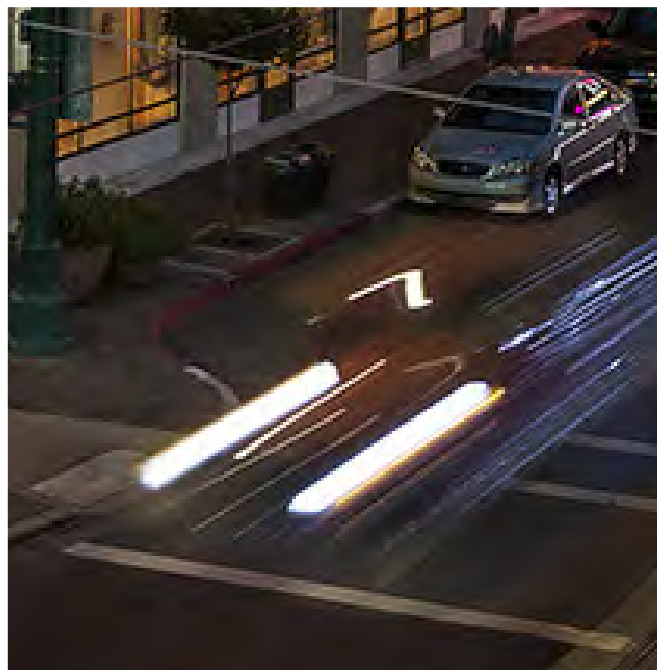
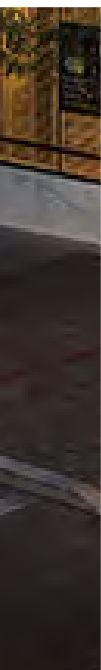
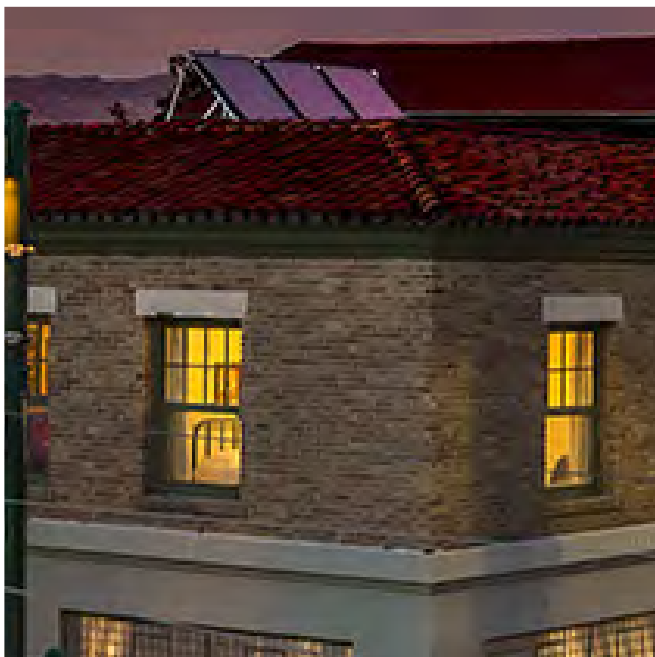
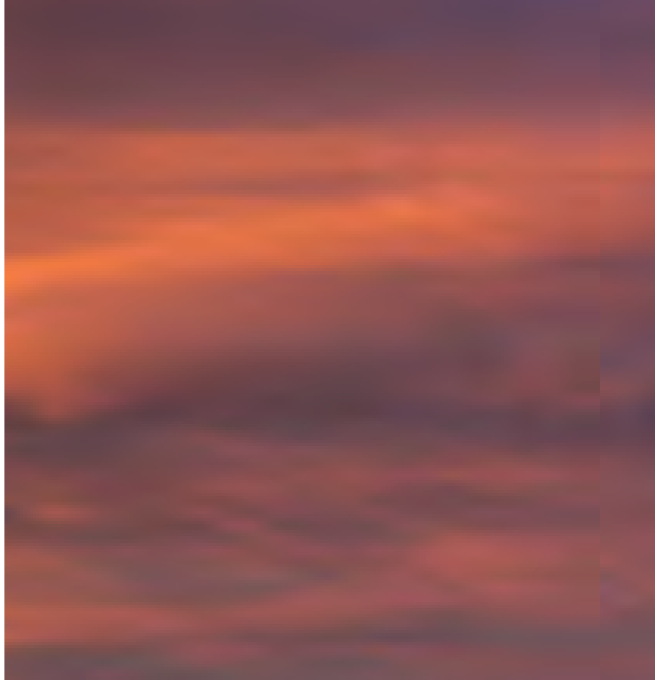


DOWNTOWN **79** CITY **47**

TRANSIT SCORE



DOWNTOWN **64** CITY **31**



SECTION ONE  
PROJECT  
OVERVIEW



# Introduction

## GREAT CITIES AND REGIONS START DOWNTOWN

No city or region can succeed without a strong downtown, the place where compactness and density bring people, capital, and ideas into the kind of proximity that builds economies, opportunity, and identity. Despite a relatively small share of a city's overall geography, downtowns deliver significant economic and community impacts across both city and region. Downtowns serve as the epicenter of commerce, capital investment, diversity, public discourse, and knowledge and innovation. They provide social benefits through access to community spaces and public institutions. They play a crucial role as the hub for employment, civic engagement, arts and culture, historical importance, local identity, and financial impact.

More than anywhere else in our cities, downtowns and center cities transform in response to the needs of changing stakeholders. They reflect national economic and social trends. They serve as models of flexibility, dynamism, diversity, efficiency, and resilience on multiple levels. The power of a downtown and center city "is rooted in its concentration of exceptional and highly significant functions – those that have a high ratio of human experience to

their space demands – be they residents or 'those who, due to their work or interests, are potentially the most enthusiastic participants in city life', the seat of government representation and key offices of both public and private organizations, and other functions that have an urban, regional, national or international significance."<sup>1</sup> This analysis explores downtown's performance with a data-based look at how it contributes to the city and region around it.

After a long period of decline in the middle and late 20th century, U.S. downtowns have experienced a resurgence in growth, livability, accessibility, and economic output. Over the past two decades, all but five of the fifty largest downtowns and central business districts (CBDs) in the U.S. experienced residential population growth; only two exhibited declines.<sup>2</sup> U.S. downtowns stand poised to continue building their economic and political prominence to match their cultural and historical value.

This project begins to unpack these trends, quantifying the value of American downtowns.

# Overview

Informed by experts and downtown leaders from around the country, this analysis encompasses more than 100 key data points over two time periods (current year and historical reference year); over three geographies (downtown, city, and region); and across 33 benefits. Evaluating downtowns on five interrelated principles—

Economy, Inclusion, Vibrancy, Identity, and Resilience—our analysis does three things: it articulates the multifaceted value of the American downtown, highlights downtown's crucial impacts on a much broader area, and standardizes metrics to help measure how American downtowns and center cities deliver for city and region.



## About the Project

2018 marks the second year of the International Downtown Association's work on *The Value of U.S. Downtowns and Center Cities*. In 2017, IDA and Stantec's Urban Places worked with 13 urban place management organizations (UPMOs) to develop a methodology for compiling and evaluating data from their center cities. Our analysis focused on trends and inherent qualities that highlighted downtowns' contributions to the cities and regions around them. In 2018, we added 11 UPMOs to the original group to build an even broader understanding of the benefits of downtown investment.

The project aims to emphasize the importance of downtown, to demonstrate its unique return on investment, to inform future decision making, and to increase support from local decision makers. Informed by the award-winning *Value of Investing in Canadian Downtowns*, the initial iteration of this project:

- Created a framework of principles and related benefits to guide data selection for measuring the value of downtowns and center cities.
- Determined key metrics for evaluating the economic, social, cultural and environmental impacts of American downtowns.
- Developed an industry-wide model for calculating the economic value of downtowns, creating a replicable methodology for continued data collection.

- Convened various downtown organizations to help shape the IDA data standard and the key metrics for evaluating the impact of downtowns.
- Provided individual analysis and performance benchmarks for 13 pilot downtowns with this new data standard, including supplemental qualitative analysis.
- Empowered and continued to support IDA members' economic and community development efforts through comparative analysis.
- Increased IDA's capacity to collect, store, visualize, aggregate and benchmark downtown data over time.

The cohort of downtowns that took part in creating the 2017 *Value of U.S. Downtowns and Center Cities* shaped its principles, methods, and value statements. They identified the most relevant metrics for measuring the value of downtowns. They included 13 UPMOs across the U.S. (Baltimore, Charlotte, Grand Rapids, Lancaster, Miami, Norfolk, Pittsburgh, Sacramento, San Antonio, San Francisco, Santa Monica, Seattle, and Wichita), which actively participated in testing this new industry-wide standard. This year we expanded the analysis to include UPMOs from Ann Arbor, Atlanta, Austin, Dallas, Durham, El Paso, Greensboro, Indianapolis, Minneapolis, Oklahoma City, and Tucson.

**IDA and the pilot downtowns indicated the following top priorities for the study:**

ENABLE  
ARTICULATION OF  
DOWNTOWN'S  
**IMPORTANCE AND  
VALUE TO A RANGE  
OF STAKEHOLDERS.**

CREATE A USEFUL  
SET OF TOOLS  
FOR **REPLICABLE,  
DATA-DRIVEN  
MEASUREMENT  
OF VALUE.**

DEFINE A  
**BASELINE FOR  
ASSESSMENT**  
OF PROGRESS  
AND PEER  
COMPARISON.

## Methodology Overview<sup>i</sup>

A downtown “has an important and unique role in economic and social development” for the wider city.<sup>3</sup> Downtowns “create a critical mass of activities where commercial, cultural, and civic activities are concentrated. This concentration facilitates business, learning, and cultural exchange.”<sup>4</sup>

To measure the value of downtowns in relation to their cities, the analysis relied heavily on data that could be collected efficiently and uniformly for a downtown, its city, and its region. To tell the full story of a downtown’s impact, we chose boundaries to capture all of downtown, not just the area in which a UPMO, such as a business improvement district, might operate. To measure the relative densities of downtown and citywide inputs, we normalized the metrics by area, per resident, and per worker.

‘DOWNTOWNS HAVE ‘AN IMPORTANT AND UNIQUE ROLE IN ECONOMIC AND SOCIAL DEVELOPMENT’ FOR THEIR CITIES AND ‘CREATE A CRITICAL MASS OF ACTIVITIES WHERE COMMERCIAL, CULTURAL, AND CIVIC ACTIVITIES ARE CONCENTRATED. THIS CONCENTRATION FACILITATES BUSINESS, LEARNING, AND CULTURAL EXCHANGE.’”

International Downtown Association

This project analyzes the value of a downtown within its city, slicing key metrics by change over time, value per square mile, value per resident, and share of city in the areas of economy, inclusion, vibrancy, identity, and resilience. The resulting value calculation focuses on the compelling metrics generated from the core indicators. The data metrics include:

**Economy:** employment, tax revenue, assessed value

**Inclusion:** diversity, education level, housing and rent prices

**Vibrancy:** retail sales, demand, density, market vitality, population growth

**Identity:** events, destinations, visitors, downtown hashtags

**Resilience:** environmental, social and economic resilience, including mode share and community resources

The project focused on creating the framework, selecting and weighting data metrics, collecting the data, creating and applying the valuation methodology, providing individual downtown and aggregate analysis of the participating cohorts, and building a baseline dataset.



<sup>i</sup> Refer to the appendix for the full methodology.

## ECONOMY



Downtowns and center cities occupy a small share of city land area but have substantial regional economic significance. As traditional centers of commerce, transportation, education, and government, downtowns frequently function as economic anchors of their regions. Because of a relatively high density of economic activity, investment in the center city provides a greater return per dollar than in other parts of the city. Just as regional economies vary, so do the economic profiles of center cities—the relative concentration of jobs, economic activity, retail spending, tax revenue, and innovation varies across our sampling. Comparing the economic role of downtowns and center cities to the larger city or region is useful in articulating downtowns’ unique value, as well as in setting development policy.

## INCLUSION



Downtowns and center cities welcome all residents of the region, as well as visitors, by providing access to opportunity, essential services, culture, recreation, entertainment, and civic activities. Though the specific offerings of each downtown may vary, they share the attributes of density, accessibility, and diversity, which promotes this access.

## VIBRANCY



Thanks to a wide base of users, downtowns and center cities can support a variety of retail, infrastructure, and institutional uses that offer broad benefits to the region. Many unique regional cultural institutions, businesses, centers of innovation, public spaces, and activities are located downtown. The variety and diversity of offerings respond to the regional market and reflect the density of downtown development. As downtowns and center cities grow, their density—of spending, users, institutions, businesses, and knowledge—allows them to support critical infrastructure, such as public parks, transportation services, affordable housing, or major retailers that can’t function as successfully elsewhere in the region.

## IDENTITY



Downtowns and center cities preserve local heritage, provide a common point of physical connection for regional residents, and actively contribute to the brand of their region. Combining community history and personal memory, a downtown’s cultural value plays a central role in preserving and promoting the region’s identity. Downtowns and center cities serve as places for regional residents to come together, participate in civic life, and celebrate their region, which in turn promotes tourism and civic society. Likewise, the “postcard view” visitors associate with a region is virtually always an image of the downtown.

## RESILIENCE



Broadly defined, resilience means a place’s ability to withstand shocks and stresses. Because of the diversity and density of resources and services, center cities and their inhabitants can better absorb economic, social, and environmental shocks and stresses than their surrounding cities and regions. The diversity and economic strengths of downtowns and center cities equip them to adapt to economic and social shocks better than more homogenous communities. Consequently, they can play a key role in advancing regional resilience, particularly in the wake of economic and environmental shocks that disproportionately affect less economically and socially dynamic areas.

## Defining Downtown

This study has adopted a definition of the commercial downtown that moves beyond the boundaries of a development authority or a business improvement district. For one thing, geographic parameters vary across data sources and may not align with a UPMO's jurisdiction. IDA's *Value of Investing in Canadian Downtowns* report expresses the challenge well:

*"Overall, endless debate could be had around the exact boundaries of a downtown, what constitutes a downtown and what elements should be in or out. Yet it is the hope of this study that anyone picking up this report and flicking to their home city will generally think: Give or take a little, this downtown boundary makes sense to me for my home city."*<sup>5</sup>

Like our Canadian study, this project worked to resolve the challenges of comparative boundary setting. IDA adopted a commonly understood definition for each downtown, using boundaries of hard edges, roads, water, natural features or highways. IDA worked with each UPMO to determine the boundaries of their downtown for this project, with a focus on aligning with census tracts for ease of incorporating

data from the U.S. Census. Within these boundaries, IDA measured multiple factors falling under each principle, looking at trends over time, proportion to the overall city, growth, and city share. The results suggest how a downtown proportionally contributes to its city in a given field, over time, per resident or per square mile.

“DOWNTOWNS ARE **LIVING, BREATHING THINGS THAT EVOLVE** OVER TIME. THEIR BOUNDARIES WILL CHANGE AS TIME GOES ON, AND THAT'S JUST PART OF THE INEVITABLE NATURE OF 21ST CENTURY URBANISM.”

Centro San Antonio



# Urban Place Management Organizations



“WITHOUT A DOUBT, A **SUCCESSFUL DOWNTOWN IS CRITICAL**. THE CITY’S INVOLVEMENT IS EVEN MORE SO. DOWNTOWNS DON’T HAPPEN – MOST OF THEM HAVE TO BE NURTURED AND WORKED ON FROM BOTH THE PUBLIC AND THE PRIVATE SIDE.”  
International Downtown Association

Urban place management organizations lead the resurgence in downtowns and center cities by advocating for targeted investment designed to activate and maintain vibrant, accessible, and welcoming downtowns. These UPMOs—including business improvement districts, downtown development authorities, and other public-private partnership groups—successfully bring together a broad range of stakeholders, provide place-based leadership, and bridge the gap between the public and private sectors. Since 1970, property and business owners in cities throughout North America have realized that revitalizing and sustaining vibrant and coherent downtowns, central business districts, and neighborhood commercial centers require special efforts beyond the services municipalities alone can provide. Inspired downtown leadership complements these efforts, builds downtown confidence, and strengthens the urban place management industry. The industry has grown at a rapid

rate, with approximately 2,500 urban UPMOs in North America and an estimated 3,000 total globally.

The success of a downtown hinges on multilateral cooperation among individuals, developers, employers, and institutions aiming to reach the same revitalization goals. Ensuring continued investment, UPMOs must continually articulate the value of center cities, not only to obvious allies but also to external stakeholders who benefit from downtown but may not recognize the role they play in helping ensure their downtown’s economic, social, and civic success. Most downtowns “have active business improvement districts that have taken on critical leadership roles: they have improved the management of the public realm, offered strong advocacy for the area among public and private decision-makers, provided up-to-date research, funded capital improvements, and promoted long-term planning.”<sup>6</sup>

## Known Limits to this Project

Constantly evolving in response to local needs and challenges, downtowns and center cities are never “done.” They require continuous investment, improvement, and development to stay vibrant and economically competitive. Every downtown featured in this report is a distinctive place, with its own history, culture, land use patterns and politics. Some downtowns serve as important drivers of economic performance and lynchpins of regional identity, and these contextual differences matter.

This project applies a range of metrics to quantify how each of 24 downtowns supports its city and region in five critical areas: economy, inclusion, vibrancy, identity, and resilience—our five ‘principles’ of downtown value. Our relatively small sample of 24 does gain representational power by its selection of downtowns that operate across a range of geographies and within widely varying contexts. Nevertheless, we recognize that its extrapolations may not apply to every downtown across the U.S. Since the data come predominantly from the 2015 and 2016 American Community Surveys (ACS) conducted by the U.S. Census Bureau, some metrics may not align precisely with more recent data from local downtown, municipal, or

proprietary sources. However, our methodology focuses on the proportion of downtowns’ contributions to their cities and regions to highlight their impacts. This analysis restricted itself to publicly available data to make sure that organizations without access to proprietary data could replicate it (although some downtowns do compile or have access to such data). We chose only data sources with which we could measure both downtown and citywide performance to assure apples-to-apples comparisons.

Additional challenges included difficulty acquiring data from partners or unavailable data; the length of time required to get information from partners or city departments; the need for the political will and relationships to acquire such data; a lack of municipal data broken out at the downtown level; defining downtown boundaries that best align with data sources; acquiring updated data from all sources; acquiring full sets of municipal finance indicators; a lack of GIS shapefiles; and the perennial challenges of timing, funding, and staffing capacity.

## Future Research and Refinement

Compared to the first year, downtowns added as part of the 2018 cohort benefitted from additional analysis on regional comparisons and the inclusion of safety indicators. As this project continues to evolve, future iterations should add:

- Public health indicators
- Housing-affordability implications
- Analysis of residential patterns in downtown-adjacent neighborhoods

The next round of downtowns will apply the methodology established in the first two iterations of this analysis, incorporating several of these additional points. IDA, working with Stantec’s Urban Places, will also release a Downtown Vitality Index that represents a global standard for measuring downtowns in an interactive method online.



# Project Definitions

These terms appear throughout the report:

**Average Daily Pedestrian Traffic** The methodology for arriving at this figure can vary by municipality. Typically, downtowns provided a figure representing average daily pedestrian traffic on one of their busier streets.

**Census Tract** is a small, relatively permanent statistical subdivision of a county or equivalent entity, updated by local participants prior to the decennial U.S. census.

**Census Block Group** is a statistical division of a census tract, generally defined as containing between 600 and 3,000 people and used to present data and control block numbering in the decennial census.

**Commercial Use** is defined as any non-residential use.

**Creative Jobs** are represented by a downtown's share of citywide and regional Arts and Entertainment jobs, as defined by the federal government's North American Industry Classification System (NAICS).

**Deliveries** are the total square footage of real estate property bought or sold.

**Destination Retail** includes clothing, electronics, and luxury goods stores, as defined by the federal government's North American Industry Classification System (NAICS).

**Event Venue** includes publicly accessible venues typically used for public events such as conferences, conventions, and concerts. Each participating downtown organization compiled its own list, a method that built some subjectivity into the lists: the downtown had the final say on, for example, whether a venue is not fully publicly accessible but is nevertheless part of the fabric of the event community and should be included.

**Knowledge Industry Jobs** include jobs within these industries, as defined by the federal government's North American Industry Classification System (NAICS): Finance, Insurance, Real Estate and Rental and Leasing; Management of Companies and Enterprises; Professional, Scientific, and Technical Services; Information; and Health Care and Social Assistance.



**Middle-Class** This study uses national definitions of employment earnings to define middle-class and middle-income demographic groups. This definition does not necessarily reflect the number of people who self-identify as middle-class, nor does it capture those who have achieved certain aspirations, such as owning a home, having retirement savings, or sending children to college. The U.S. Census defines middle-class or middle-income earnings as annual household income of \$40,000 to \$100,000.

- Attainable middle-class rent means monthly rental rates between \$800 and \$1,500 a month, as defined by the U.S. Census.
- Attainable middle-class housing prices means unit sale prices between \$300,000 and \$750,000, as defined by the U.S. Census.

**Professional Jobs** the Professional, Scientific, and Technical services sector is part of the Professional and Business Services supersector, coded 541, within the federal government's North American Industry Classification System (NAICS).

**Rent-Burdened** households are defined in the U.S. Census table B25070, which measures gross rent as a percentage of household income in the past 12 months. Rent-burdened populations represent the sum of households paying more than 30 percent of household income for rent.

**Retail Demand** measures the total spending potential of an area's population, determined by combining residential population and household income characteristics.

**Public Capital Investment** is defined by each downtown individually but typically includes municipal, state, and federal investment in capital projects such as infrastructure and open space projects within downtown boundaries as defined for this analysis. Some downtowns could only collect data for a subset of public investments such as municipal public investment. In those instances, a footnote indicates the absence of data from the other sources. The timeframe is the most recent full year available (2017).

**Public and Private Investment** comprise total annual investment by the public and private sectors into a downtown.

**Square Footage** To estimate square feet of built uses, we assumed residential units measured 1,000 sq. ft and hotel rooms measured 330 sq ft.



SECTION TWO  
FINDINGS



## Land Area



**Metric:** Geographic Footprint

**Average Study Downtown:** 3% of the city's land area

Downtowns constitute a small area of the city's land, yet deliver significant benefits for the city and region. The average downtown constituted 3 percent of total citywide land area, ranging from 0.3 percent to 8.2 percent.

Downtown is **3%**  
of the city's land  
and accounts for:



**\$8**

BILLION  
ASSESSED  
VALUE

**12%**

SALES TAX  
REVENUE

**16%**

PROPERTY  
TAX REVENUE

**42%**

HOTEL TAX  
REVENUE

## Economy

While downtowns and center cities constitute a small share of citywide land area, there's no understating their regional economic importance. As traditional centers of commerce, transportation, education, and government, downtowns serve as economic anchors for their cities and regions. Thanks to highly concentrated economic activity, investment in the center city yields a high level of return per dollar. Just as regional economies vary, so do the economic profiles of center cities—the relative concentration of jobs, economic activity, retail spending, tax revenue, and innovation varies among downtowns and center cities. Analyzing the economic role of downtowns and center cities in the larger city and region highlights their unique value and provides a valuable guide for development policy.



### Average Assessed Value

	Downtown	City
Per Acre	\$5M	\$1.1M
Per Square Mile	\$3.1B	\$717M



### Assessed Value of Downtown Land

On average, downtowns in this study constitute just 3 percent of city land area, while yielding much higher proportions of overall assessed land value. The average assessed value of a downtown in this study represents 11 percent of citywide land value or approximately \$8 billion on average. On a per square mile basis, for every \$1 that citywide land is assessed at, downtown land carries an assessment of \$4.36.

Not only is downtown's footprint highly valuable, but downtown areas also generate significant tax revenue. For example, on average, study downtowns generate an average of \$32.4 million in property taxes per square mile compared to the average of \$7.1 million per square mile citywide.

Downtown's outsized contribution extends to hotel taxes, where downtown districts generate almost half of the city's hotel tax revenue. Per square mile, the average downtown generates \$13 million in hotel tax revenue, compared to \$1 million citywide.

### Downtown Employment

With more than a quarter of the city's total jobs, downtowns carry significant weight in both job creation and job growth. Downtowns are economic anchors, attracting and serving more workers than their proportional land area.

**Metric:** Citywide Office Space in Downtown

**Benefit:** Density

**Average for study downtowns:**

- 36% of total citywide office space
- 34% of total citywide corporate headquarters
- 56% of total citywide co-working space
- 10% average vacancy rate

Given their broad mix of uses, density, highly-skilled workforce, and centralized multi-modal built environment, downtown locations appeal to employers. The average study downtown accounts for 36 percent of their city's total available office space.

Downtowns support a dense employment sector through a diverse office market. On average, the study downtowns support 34 percent of a city's corporate headquarters. Market demand keeps the average downtowns' office vacancy rate at a healthy 10 percent, although this only slightly outpaces the citywide average of 12 percent. Combined with higher rents than the city at large, slightly lower vacancy rates suggest that businesses will pay premium prices to locate in downtown.

Downtowns also support startups and small businesses. The average downtown holds 56 percent of citywide co-working space, positioning itself to attract innovative firms and talent, which tend to favor flexible office arrangements.





**Metric:** Percent of Citywide Creative and Knowledge Jobs in Downtown

**Benefits:** Creativity and Innovation

**Average Study Downtown:**

- 34% of total citywide creative jobs
- 28% of total citywide knowledge jobs

Employment opportunities concentrate in downtowns, attracting highly skilled, innovative and creative talent from across the region. Downtowns have a dense professional base of knowledge workers, accounting for more than a quarter of a city's knowledge jobs. Workers in the arts and other creative industries also cluster downtown, accounting on average for 34 percent of a city's share of creative jobs.

Data show that knowledge workers are heading to cities. From 2000 to 2014, the number of 25-to-49-year-olds with a four-year degree living in the urban core increased by 15 percent, while the same age group without a 4-year degree moving into the urban core decreased by 5 percent.<sup>1</sup> During that same period, in 51 U.S. metro areas with more than one million residents, the number of 24- to 35-year-olds with four-year degrees living in central urban neighborhoods rose by 37 percent. This same population grew at less than half that rate in neighborhoods outside central areas.<sup>2</sup> The population of this same group living in these same areas grew by 19 percent from 2012 to 2016, while the cities themselves grew only by 4 percent.<sup>3</sup>

## Inclusion

Downtowns and center cities welcome all residents of the region and visitors by connecting a range of users to essential elements of urban life, such as high-quality jobs, indispensable services, recreation, culture, public space, and civic activities. Though offerings vary by city, they share the attributes of density, accessibility, and diversity.

The downtown resurgence of the last decade has put pressure on the inclusive nature of many downtowns. While amenities and access to opportunities make downtowns more equitable than their metro areas, rising demand for downtown housing and office space has forced out many longtime residents and businesses. This development troubles many downtown advocates, given downtowns' historical role as regional epicenters for inclusive living and working. These advocates have focused on finding ways to counteract the pressures on lower-income users created by downtowns' success. With downtown's concentration of educational, job-training and healthcare opportunities, pushing lower-income residents further out provides a great obstacle when trying to achieve financial stability.

IDA members (downtown place management organizations) pride themselves on being diverse, equitable and inclusive. They actively seek policy and programmatic solutions to ensure that downtowns remain accessible to all users. Downtown Grand Rapids has tackled the issue of equity head on in the face of economic development and deepening racial inequity and displacement. Identifying growing wealth and opportunity gaps in the city, downtown Grand Rapids initiated a citywide dialogue and a planning process for accommodating growth. These efforts resulted in setting equitable development goals, including fostering racially and ethnically diverse business ownership, attracting a diverse population to downtown, and making downtown more welcoming and inclusive.

In 2018, the Minneapolis Downtown Council collaborated with the YMCA of the Greater Twin Cities to launch the Inclusive Downtown Think Tank, a cross-sector research-to-action work group. Recognizing that the challenge of inclusivity cannot be overcome by just one or two organizations, the Think Tank brings together more than 90



public, private, and non-profit leaders to “imagine, define and create an inclusive downtown that contributes to our vision of Minneapolis as one of the nation’s best places to live, visit and do business.”<sup>4</sup>

Through a series of facilitated, monthly sessions, the Think Tank tackled head-on the challenge of inclusion and diversity – what are the biggest issues to tackle, “crossroads issues” - issues that concern multiple stakeholders and sectors, and gaps that are currently unaddressed. Through these sessions, these leaders developed a common agenda for what an inclusive downtown means. The next phase of the think tank work, to be completed in 2019 is to move from innovation to action and formulate actionable solutions that create a model for collective impact. Through the Inclusive Downtown Think Tank, the MDC and YMCA are taking a proactive step towards tackling the growing challenges of inequity in their downtown.



**Metric:** Middle-Income Downtown Households\*

**Benefit:** Equity

**Average Study Downtown:** 29% of residents are middle-income

Downtowns are traditionally home to residents of all income levels. While some have the perception that downtowns are only for the rich, or only for the poor, on average, study downtowns had 29% middle-income residents.

**Metric:** Residential Racial Demographics

**Benefit:** Diversity

**Average Study Downtown:** 44% of downtown residents are non-white

A mix of races and cultures in downtown is an indicator of the vibrancy of downtown, and an indicator of equal access to the wealth of resources and opportunities available in downtown. On average, study downtowns had 44% of non-white residents, although it is important to note that diversity is more nuanced than the simple presence of non-white residents, depending on the context and history of the downtown and city.

\*Based on national averages, middle-income is defined as households earning between \$40,000 to \$100,000 annually.



**Metric:** Residents With a Bachelor's or Advanced Degree

**Benefits:** Education

**Average Study Downtown:** 47% of downtown residents have a bachelor's or advanced degree

Downtowns are home to a residential population with a wide range of education levels, typically with a concentration of residents who are college-educated. The percent of downtown residents with a bachelor's degree or higher ranged from 3% to 86% among the study downtowns. Education levels were particularly high in downtowns near a university campus.

**Metric:** Attainable Middle-Income Housing in Downtown

**Benefit:** Attainability and Affordability

**Average Study Downtown:** 37% of rental units and 36% of homes for sale are attainable to middle-income households

The recent revival of interest in downtowns across the U.S. has drawn new residents and development to the downtowns. Since markets typically respond to demand only after it appears, maintaining an adequate supply of housing to moderate housing costs becomes a game of catch-up. Housing costs have risen in response to new demand and lagging supply. Nevertheless, based on national affordability averages, 37 percent of rental units and 36 percent of owner-occupied units have remained attainable for middle-income households in the downtowns. While the share of middle-income housing stock varies, all tiers of downtowns have the chance to invest in filling the "missing middle."

**Metric:** Growth of Renters in Downtown

**Benefit:** Opportunity

**Average study downtown's growth of renters (2010-2016):** 19%

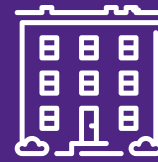
The average study downtown has seen substantial growth in the number of renters since 2010. Nearly every study downtown experienced a growth in residents renting housing in the post-Recession period. Downtowns should harness this energy and drive investment and development toward affordable and attainable middle-class rental and housing units, to further strengthen overall equity.

## Vibrancy

Downtowns and center cities support unique retail, infrastructure, and institutional uses that serve the entire region. Made possible by the density of spending, users, institutions, businesses, and knowledge found only in downtown, these uses typically include regionally important cultural institutions, businesses, centers of innovation, public spaces, and activities.

“AN ENGAGING DOWNTOWN CREATES THE CRITICAL MASS OF ACTIVITY THAT SUPPORTS RETAIL AND RESTAURANTS, BRINGS PEOPLE TOGETHER IN SOCIAL SETTINGS, MAKES STREETS FEEL SAFE, AND ENCOURAGES PEOPLE TO LIVE AND WORK DOWNTOWN BECAUSE OF THE EXTENSIVE AMENITIES.”

International Downtown Association



### Downtown Residential Averages

CITY'S POPULATION

5%

AVERAGE POPULATION GROWTH

27%

DOWNTOWN RESIDENTS AGES 18-34

46%

DOWNTOWN MIDDLE-INCOME HOUSEHOLDS

29%

**Metric:** Population Growth (2010-2016)

**Benefit:** Utilization

**Average Study Downtown:**

- 27% Downtown
- 7% Citywide

On average, population in the study downtowns grew by 27 percent, compared with their average citywide growth of 7 percent.

The renewed national interest in living downtown reflects changes in the market: a growing preference for living closer to work; for having the option of walking to stores and services; and for easy access to a variety of recreational and entertainment opportunities. Residents of the larger city and region tend to value downtowns as hubs for social and cultural activity.

**Metric:** Residential Density

**Benefit:** Density

**Average Study Downtown:**

- 5% of citywide population
- 12 residents per acre downtown
- 7 residents per acre citywide

Measuring density is an important component of measuring the overall value of a downtown. The denser a downtown, city, or region is, the more opportunities and amenities it produces for residents. Density provides economic advantages, bringing people and firms together while making it easier for people to exchange ideas and information, collaborate on projects, and launch new businesses.



**Metric:** Growth in Residential Housing Units

**Benefit:** Investment

**Average Study Downtown:**

- 33% residential inventory growth downtown

Excluding outlier downtowns with exceptionally high rates of residential growth, the study downtowns averaged 33 percent growth in residential inventory since 2010.

No stronger demonstration of downtown vibrancy exists than the rising demand for downtown living. Over the past several years, North American city centers have seen an influx of young people, educated professionals, and wealthier older couples looking for a walkable, urban lifestyle.<sup>6</sup> Dynamism and density contribute to a downtown's vibrancy and growth. The confluence of people, amenities, and experiences makes downtowns immensely attractive and vital resources for their cities.

**Metric:** Percentage of Downtown Residents Who Are 18–34

**Benefits:** Creativity and Innovation

**Average Study Downtown:** 46%

Part of the growth experienced in the downtowns has come from millennials attracted to the walkable, mixed-use environment that downtowns offer. Across the downtowns, an average of 46 percent of downtown residents are between 18 and 34.

Millennials are now the largest generation in the country's workforce, making them a key demographic to recruit. Affordable housing rents, access to parks and outdoor spaces, ease of non-car transportation, and employment opportunities all top the list of what millennials look for in a place to live.<sup>7</sup> For those reasons, downtowns are a natural fit for this key demographic.

## Retail Industry

**Metric:** Number of Retail Offerings and Annual Retail Sales in Downtown

**Benefit:** Spending

**Average Study Downtown:** 13% of citywide retail sales

**Average Study Downtown:** 14% of citywide retail businesses

**Average Annual Retail Sales Per Square Mile:**

Downtown	Citywide
\$452 million	\$88 million

Downtown's vibrant marketplace attracts residents and workers, and it conjures a positive association for the center city. This association attracts repeat customers and visitors, and plays a key role in attracting other retailers, including those willing to pay premium rates because of downtown's vibrancy and the existence of a retail cluster. A healthy retail mix not only stabilizes a local economy, but it can also concentrate the variety of businesses needed for consumers to justify spending time and money in downtown.<sup>8</sup>

**Metric:** Retail Sales Tax Per Square Mile

**Benefit:** Economic Impact

**Average study downtown sales tax revenue:** \$53 million

**Average citywide sales tax revenue:** \$5.8 million

Despite their small land area, study downtowns account for 14 percent of all retail businesses in their cities. They also account, on average, for 13 percent of aggregate citywide retail sales.

Retail and food & beverage businesses pull in an average of \$88 million in sales per square mile citywide, compared to \$452 million in downtown. In other words, average downtowns generate five times as much revenue in retail and food & beverage sales per square mile than the city.



## Identity

Downtowns and center cities preserve the heritage of a place, provide a common point of physical connection for regional residents, and contribute positively to the brand of the regions they represent. Whether from a historical event or personal memory, downtowns have intrinsic cultural value important to preserving and promoting the region's brand. Downtowns and center cities offer a place for the region's residents to come together, participate in civic life, and celebrate the region, which in turn promotes civic society and tourism. Likewise, the "postcard view" visitors associate with a region virtually always features an image or attribute of downtown.

Downtowns "have historically served as the center of theater, arts and culture."<sup>9</sup> This history is highlighted in the downtowns' averages of 84 art installations, 81 historic structures, and 11 museums. An average of 153 outdoor events annually and 242 conventions animate the downtowns all year-round. They help support an overall average of 27 hotels with 5,500 rooms that make up 35 percent of the city's hotel room inventory.

A livable core "contributes to a downtown's vibrancy and attractiveness and can cement its place as the literal and symbolic heart of the city as a whole."<sup>10</sup> Innumerable attributes—retail choices, residential density, economic performance, as well as cultural, natural, built and historic assets—help establish a downtowns' brand and identity that extend well beyond downtown residents. Downtowns are "iconic and powerful symbols for a city and often contain the most iconic landmarks, distinctive features, and unique neighborhoods. Given that most downtowns are among the oldest neighborhoods citywide, they offer rare insights into their city's past, present and future."<sup>11</sup>

IDA's 2016 Authenticity Council writes,

*"Authenticity can be found in both the physical and cultural characteristics of a city. The cultural heritage of a city is reflected in its built environment, including residential and commercial buildings, public spaces and gathering places. The creativity and ingenuity of a people is reflected in the design of the streets, in its landscape and in its public art. Diversity and resilience are reflected in the eclectic business mix and the people that come downtown for a multitude of reasons. Some call it a 'sense of place,' others may call it 'uniqueness,' but for this exercise, we are defining what makes a city authentic: its people, its culture, the built environment, the natural environment and physical geography, and signature events."*<sup>12</sup>



**Metric:** Number of Public Art Installations

**Benefits:** Fun and Celebrate

**Average Study Downtown:** 84

Public art – its creation, appreciation, and celebration – has always been a part of downtown. The downtowns in this study average 84 public art installations, contributing to downtown’s authenticity and cultural heritage.

**Metric:** Number of Historic Structures

**Benefits:** Heritage and Tradition

**Average Study Downtown:** 81

Downtowns contain concentrations of historic, civic, and institutional buildings, entertainment, and retail options. This clustering of activity contributes to the quality of place: Downtowns are places people want to be in and often important venues for experiences that leave lasting memories. The inclusive nature of downtowns also contributes to their vibrancy, creating a dynamic, growing community attracting diverse people, ideas, cultures, heritages and beliefs. On average, the downtowns have 81 historic structures, though the figures cover a large range. These downtowns have an exceptional opportunity to preserve these structures through adaptive reuse and infill development before higher levels of growth and development occur.



81

HISTORIC  
STRUCTURES



11

MUSEUMS



24

COMMUNITY AND  
CIVIC PLACES



11

PARKS



84

PUBLIC ART



242

ANNUAL  
CONVENTIONS

**Metric:** Number of Museums

**Benefit:** Culture

**Average Study Downtown:** 11 museums

Access to and the presence of museums in downtown provide residents and visitors with the opportunity to experience historic and cultural artifacts, academic and cultural programming, and new ideas and goods not typically found elsewhere in the city, region or state.



**27** 5,500  
HOTELS HOTEL ROOMS  
**35%**

DOWNTOWN  
HOTEL  
ROOMS  
CITY'S  
HOTEL  
ROOMS

**Metric:** Annual Conventions and Events

**Benefit:** Visitation

**Average Study Downtown:** 242 annual conventions downtown, 153 annual outdoor events

Downtown hotels are a primary entry into the city for visitors, exposing them to local amenities, history, culture and significance. The density of hotels in downtown accounts for an outsized proportion of hotels and hotel rooms.

A central location and proximity to firms and transit make downtowns ideal candidates for hosting conventions. Conventions place downtowns on the international stage, attracting visitors from varying business sectors and countries to experience downtown's offerings. Downtowns are equipped to handle these visitors given their hotel inventory, access to transit and walkability, and retail and food and beverage options.

## Resilience

Broadly defined, resilience means a place's ability to withstand shocks and stresses. Along with economic performance, diversity, density, and supply of resources and services equip city centers and their residents to absorb economic, social, and environmental shocks and stresses more easily than the traditionally homogeneous cities and regions around them. Throughout the U.S., in fact, "diverse, mixed-use places are outperforming single-use employment districts."<sup>13</sup> Given their ability to bounce back, downtowns can support regional resilience, particularly to economic shocks that disproportionately affect less economically and socially dynamic areas. Similarly, downtowns and center cities are better positioned than other parts of the city to make investments to hedge against and withstand increasingly-frequent environmental shocks and stresses.

Downtown place management organizations can work to make their communities more resilient through environmental, social, and economic initiatives, like sustainable transit solutions, affordable housing advocacy, and policies to encourage minority populations to open businesses in downtown. For example, the Miami Downtown Development Authority (DDA) has a complete streets initiative with the goals of safer streets and more sustainable mobility. The Miami DDA will spearhead the conversion of a portion along a key street from three lanes of auto traffic to a multi-modal corridor with a bus-lane and highly visible bicycle lane. Downtown place management organizations can also work with their cities to ensure that downtown welcomes and serves everyone. In another case, the Downtown Seattle Association helped found Seattle for Everyone (a coalition of "affordable housing developers, environmentalists, social justice advocates and labor organizers"<sup>14</sup>), and has embraced its role as a staunch advocate for affordable and market-rate housing in downtown. That work has included development of the Housing Affordability and Livability Agenda (HALA) for city council review.

IDA awarded its 2018 Downtown Achievement Award for Leadership and Management to the Downtown Tucson Partnership for its innovative DTP Connects program to address chronic street homelessness. In collaboration with Old Pueblo Community Services, DTP staffed a table in Jacome Plaza—which had an encampment of more than 80 homeless people—to ask "Need a Home?" and connect interested participants with housing and support services. The program has achieved solid success, placing about 80 people into housing in its first three months, decreasing chronic street homelessness by 96%, and reducing safety and sanitation calls to DTP and police, fire, and emergency services. The placements also supported transformation of Jácome Plaza into a vibrant public plaza enjoyed by all residents.

**Metric:** Number of Parks per Square Mile

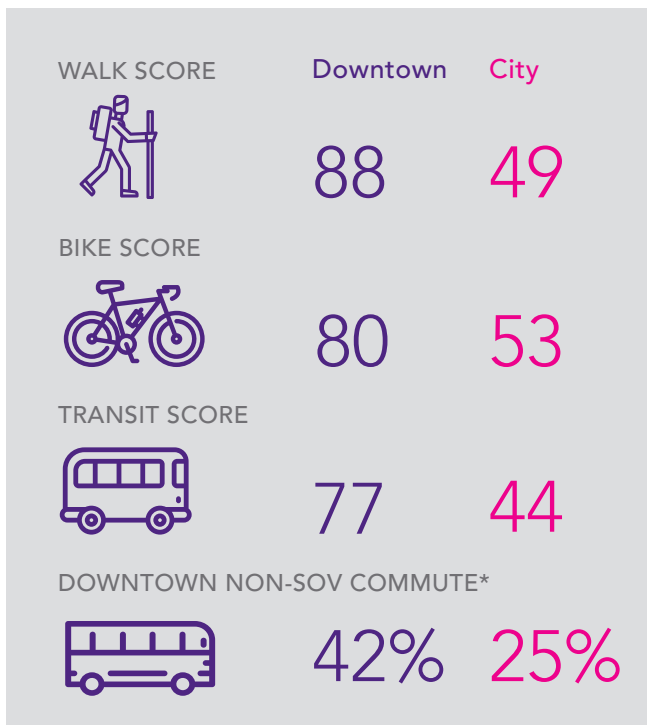
**Benefit:** Sustainability

**Average Study Downtown:**

- 11 parks in a downtown
- 5 parks per square mile

Parks not only function as the lungs of downtown and the city, but they also serve as third places, opportunities for civic engagement, and destinations for healthy exercise. The average downtown has 11 parks, averaging 5 per square mile. This density of parks provides residents, workers and visitors the opportunity to participate in activities with frequency and at their convenience. The "earliest park designers understood implicitly that open spaces were linked to healthier living, and research is starting to confirm that link"<sup>15</sup> as it relates to increased health and happiness. Cities and downtowns with substantial access to parks are typically considered more livable, as parks elevate quality of life.

The study downtowns are uniformly more walkable, bikeable, and transit accessible than their cities overall. Downtowns are highly accessible and walkable, connected to a strong ring of inner neighborhoods, and generally sit at the center of their city's transportation network. The multi-modal and easily accessible nature of downtown makes for more sustainable commuting patterns.



\*non-single occupancy commuting patterns include all modes besides driving alone.

**Metric:** Number of Civic and Community Places<sup>16</sup>

**Benefits:** Civic Participation and Services

**Average Study Downtown:** 24

Within downtowns, numerous religious institutions, community centers, and public libraries provide residents and visitors with opportunities to engage in discourse about community, cultural, and civic activities.





Based on the data collected for the *Value of U.S. Downtowns and Center Cities* study, we identified three tiers of downtowns, defined by stage of development. We divided the 24 downtowns that have participated to date into “established”, “growing” and “emerging” tiers based on average growth in employment, residential density, population growth, job density, and assessed value per square mile. It is important to note that downtown geography and demographics served as the sole basis for the tiers and that a small sample size required a conservative approach to generalizations.

## Established Downtowns

- MIAMI
- MINNEAPOLIS
- SEATTLE

AVERAGE OF **6.1%** OF THE CITYWIDE LAND AREA WITH AN AVERAGE ASSESSED VALUE OF **\$29.4 BILLION** (28% OF THE CITY'S TOTAL VALUE) AND ACCOUNTS FOR:

32%	PROPERTY TAX REVENUE
26%	SALES TAX REVENUE
49%	HOTEL TAX REVENUE
14%	CITYWIDE POPULATION
41%	DOWNTOWN RESIDENTS ARE MILLENNIAL



	DOWNTOWN	CITYWIDE
GROWTH AVG. 2010 – 2016	29%	10%
DENSITY RESIDENTS / ACRE	26	12
INCOME MEDIAN HOUSEHOLD	\$57K	\$52K



52%	CITYWIDE JOBS
62%	CITYWIDE KNOWLEDGE JOBS
53%	CITYWIDE CREATIVE JOBS
69%	CITYWIDE OFFICE SPACE



49	HOTELS
9,479	HOTEL ROOMS
57%	CITYWIDE HOTEL ROOMS



DOWNTOWN NON-SOV COMMUTE	
DOWNTOWN	
54%	
CITY	
36%	

### WALK SCORE



DOWNTOWN	CITY
96	73

### BIKE SCORE



DOWNTOWN	CITY
77	68

### TRANSIT SCORE



DOWNTOWN	CITY
98	58

## Growing Downtowns

- ANN ARBOR
- CHARLOTTE
- PITTSBURGH
- ATLANTA
- DALLAS
- SANTA MONICA
- AUSTIN
- GRAND RAPIDS
- UNION SQUARE, SAN FRANCISCO
- BALTIMORE
- INDIANAPOLIS

AVERAGE OF **3.1%** OF THE CITYWIDE LAND AREA WITH AN AVERAGE ASSESSED VALUE OF **\$7.4 BILLION** (11% OF THE CITY'S TOTAL VALUE) AND ACCOUNTS FOR:

- 13%** PROPERTY TAX REVENUE
- 16%** SALES TAX REVENUE
- 51%** HOTEL TAX REVENUE
- 5%** CITYWIDE POPULATION
- 52%** DOWNTOWN RESIDENTS ARE MILLENNIAL

## Emerging Downtowns

- DURHAM
- EL PASO
- GREENSBORO
- LANCASTER (CA)
- NORFOLK
- OKLAHOMA CITY
- SACRAMENTO
- SAN ANTONIO
- TUCSON
- WICHITA

AVERAGE OF **1.7%** OF THE CITYWIDE LAND AREA WITH AN AVERAGE ASSESSED VALUE OF **\$1.5 BILLION** (3% OF THE CITY'S TOTAL VALUE) AND ACCOUNTS FOR:

- 11%** PROPERTY TAX REVENUE
- 4%** SALES TAX REVENUE
- 31%** HOTEL TAX REVENUE
- 3%** CITYWIDE POPULATION
- 41%** DOWNTOWN RESIDENTS ARE MILLENNIAL



### RESIDENTIAL

	DOWNTOWN	CITYWIDE
GROWTH AVG. 2010 – 2016	<b>37%</b>	6%
DENSITY RESIDENTS / ACRE	<b>14</b>	9
INCOME MEDIAN HOUSEHOLD	<b>\$53K</b>	\$55K



### RESIDENTIAL

	DOWNTOWN	CITYWIDE
GROWTH AVG. 2010 – 2016	<b>14%</b>	6%
DENSITY RESIDENTS / ACRE	<b>6</b>	4
INCOME MEDIAN HOUSEHOLD	<b>\$33K</b>	\$47K



### EMPLOYMENT

- 30%** CITYWIDE JOBS
- 32%** CITYWIDE KNOWLEDGE JOBS
- 38%** CITYWIDE CREATIVE JOBS
- 38%** CITYWIDE OFFICE SPACE



- 27** HOTELS
- 6,042** HOTEL ROOMS
- 40%** CITYWIDE HOTEL ROOMS



### EMPLOYMENT

- 17%** CITYWIDE JOBS
- 15%** CITYWIDE KNOWLEDGE JOBS
- 23%** CITYWIDE CREATIVE JOBS
- 25%** CITYWIDE OFFICE SPACE



- 18** HOTELS
- 3,399** HOTEL ROOMS
- 21%** CITYWIDE HOTEL ROOMS



DOWNTOWN  
NON-SOV  
COMMUTE

- 44%** DOWNTOWN
- 30%** CITY

WALK SCORE



- 91** DOWNTOWN
- 54** CITY

BIKE SCORE



- 81** DOWNTOWN
- 54** CITY

TRANSIT SCORE



- 80** DOWNTOWN
- 49** CITY



DOWNTOWN  
NON-SOV  
COMMUTE

- 35%** DOWNTOWN
- 15%** CITY

WALK SCORE



- 82** DOWNTOWN
- 37** CITY

BIKE SCORE



- 79** DOWNTOWN
- 47** CITY

TRANSIT SCORE



- 64** DOWNTOWN
- 31** CITY



SECTION THREE

# CHALLENGES & OPPORTUNITIES



## Economy

As traditional centers of commerce, transportation, education, and government, downtowns typically serve as economic anchors for their regions. Because the city, county, and region are so tightly tied to each other and to downtown, gains in the downtown economy improve performance throughout the citywide and regional economy. At the same time, economic losses in downtown have a direct and negative impact on surrounding areas.

**Investment Efficiency:** Per unit of measurement, whether by acre, hectare or square mile, **a downtown is more economically productive than its greater city.** Thanks to the density of economic activity, center city investment provides a higher level of return per dollar than other parts of the city. As noted earlier, downtowns and center cities make up a small share of citywide land area, but they wield substantial municipal and regional economic influence through higher assessed and values and a disproportionately large share of local taxes.

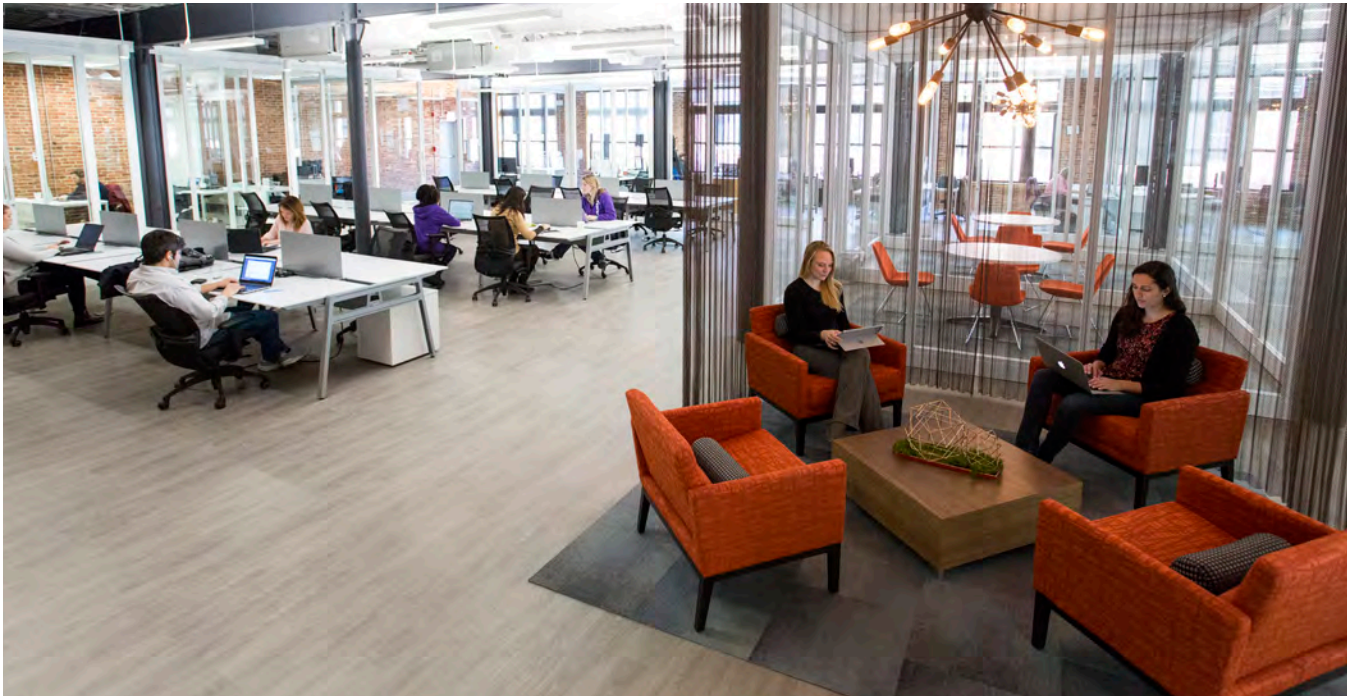
But revenue sources shift over time. For example, municipalities should prepare for parking taxes to take a major hit as autonomous vehicles (AVs) become more widespread. While the future of AVs is far from certain, they clearly have the potential to shrink parking demand because of their capacity for shared and continuous use. This may yield positive externalities—fewer cars on the road, less traffic, and improved air quality—yet it will certainly create one significant negative externality: a sharp drop in parking tax revenue. More than just downtown will feel this loss. This suggests the importance of preparing to recover revenue, perhaps by converting downtown parking lots to other uses, then capturing (and benefitting from) the true value of that land.

**Economic Impact:** Continued public investment in downtown will benefit current infrastructure, residents, and firms, and it will also generate outsized returns in comparison to downtown's size. Because of downtown's economic productivity, every dollar invested there has the potential to generate much greater returns than investment in less productive areas. To maintain



downtown's economic impact, cities will need to continue investing there, both to cushion the loss from a continuing shrinkage of federal funding and to compensate for the evolving nature of tax revenues.

**Employment:** Downtowns attract knowledge workers and highly skilled laborers and the businesses that employ them. This positions downtowns to support clusters of new and innovative industries. At the same time, the downtown-focused employers are reshaping the landscape



of commercial real estate by promoting changes in the size and function of office space. As co-working and shared-office models become more common, downtowns will need to continue to adapt their office space offerings to accommodate emerging uses.

In addition, to continue attracting and retaining knowledge workers and technology professionals, place management organizations can play an active role in making sure their downtown has the amenities, qualities of place, and mix of uses that keep them competitive for these businesses. Place management organizations can also champion adaptive reuse of older industrial structures and transformation of office spaces for other uses, helping their downtown keep pace with the evolving marketplace.

**Equity:** Downtowns that succeed in attracting highly-skilled talent and higher-income residents can't ignore national trends of income disparity. Priorities need to include equitable development and growth that does not

displace long-time residents, lower-income households, or workforce opportunities for all residents with the skills needed to advance in today's marketplace. While a place management organization doesn't typically set out to address these issues, it can easily find itself grappling with them when it organizes workforce-training pilot programs, collaborates across sectors to improve the offerings of a place, or works to diversify its mix of tenants and services to provide goods and services for all households. Place management organizations can be part of the conversation on equitable development—or they can lead it—at the local and regional level, convening public and private partners to advocate for innovative inclusion and accessibility. They can seize the opportunity to embrace a collaborative approach, engaging community cooperation, public and private leadership, thoughtful planning, and a regulatory climate that encourages strategic, place-based development that enhances community wealth.

## Inclusion

**Diversity:** Downtowns are home to a diverse employment sector and a diverse residential population. As downtowns strive to be inclusive homes for a diverse group of residents and employers, several questions come to mind for downtowns to consider: *How can center cities attract more diversity and make it easier for a wide diversity of people to live and work there? What workforce and middle-income employment and housing strategies have proved most successful? How can downtowns encourage more transportation access, immigrants in the workforce, and jobs at all levels?* Downtowns should continue to strive to welcome everyone within and outside the community. As each downtown evolves, it needs to develop strategies for achieving vibrant, diverse and multi-generational communities.<sup>17</sup>

**Attainability:** Central to downtown inclusion is housing attainability. In almost every downtown, affordability remains a challenge. While the national resurgence of downtowns has produced numerous benefits for many people, it has also increased property values, housing costs and demand for downtown housing, displacing some residents and making downtown living unattainable for others. Even in nascent markets, low- and middle-income housing can be scarce. Key downtown housing issues include: affordability, ownership, building complete and diverse communities for all, meaningful resident engagement, residential services, and accessibility. Downtowns have turned their focus to finding ways to counteract the pressures and burdens imposed on lower-income households by downtowns' success.

“DOWNTOWNS THROUGHOUT NORTH AMERICA ARE **MAKING A MAJOR CONTRIBUTION TO THE BOTTOM LINE OF THEIR MUNICIPALITIES.** IN MOST CASES, DOWNTOWNS SERVE AS THE ENGINE FOR LOCAL ECONOMIES. HOWEVER, DOWNTOWNS ARE MUCH MORE THAN A PROFIT CENTER TO CITIES. THEY ALSO **REPRESENT THE IMAGE AND CHARACTER OF A CITY TO THE REST OF THE WORLD.** DOWNTOWNS ARE UNIQUE IN THAT THEY ARE TYPICALLY THE ONLY NEIGHBORHOOD THAT BELONGS TO AND IS SHARED BY EVERYONE IN THE REGION.”<sup>18</sup>

Andy Kitsinger



A 2017 study by the Harvard Joint Center for Housing Studies found that,

*“While residential segregation and concentrated disadvantages are not new challenges in the United States, the evolving demography, income distribution, and geography of American communities are changing the nature of these problems and the solutions needed to foster more inclusive communities.... Throughout the country, job growth in central cities, improved neighborhood amenities, and increased demand for urban living have simultaneously fostered rapid increases in housing costs in longstanding low-income and minority communities in urban cores.”<sup>19</sup>*

**Equity:** The downtown resurgence has put pressure on the inclusive nature of many downtowns. While amenities and access to opportunities make downtowns more equitable than their metropolitan counterparts, rising demand for downtown housing and office space has forced out many longtime residents and businesses. This development troubles many downtown advocates, given downtowns’ historical role as regional epicenters for inclusive living and working. Immigrant housing patterns give further evidence of this tension: many immigrant households “drive to opportunity,” skipping downtowns and urban neighborhoods and heading directly to less-expensive suburbs. National trends illustrate the educational and income divides between those moving into and out of urban cores.

**Given rising demand, downtowns will need to work to make sure the proportion of middle-income households doesn’t shrink – or, even better, that it grows.** Strategic policies fill the “missing middle” with a diverse selection of housing stock and affordable for a wide range of household incomes. Housing authorities and nonprofits such as community development corporations have become creative in their approach, sometimes diversifying their portfolios to subsidize affordable housing with market-rate housing. Some cities have created land banks to hold land in order to stabilize property values.<sup>20</sup> Urban place management organizations can work with these organizations to advocate for affordable housing development in their downtowns. Typically, addressing these challenges involves a sequence of predictable steps: creating a vision, taking inventory, offering and promoting incentives, providing services and amenities, and conducting periodic evaluations.<sup>21</sup> Research has identified indicators that promote both social equity and economic vitality in downtowns: They include housing choices that are affordable, mixed-use, mixed-income and include a mix of types; affordable and accessible mobility options including walking and biking; high-quality schools, training programs and job opportunities available to all residents; and retail offerings that appeal to a mix of consumers at a variety of price points.<sup>22</sup>



Downtowns such as Pittsburgh and Baltimore have pursued strategies of adaptive reuse and infill development to turn vacant commercial buildings into residential units. This has helped them keep up with market demand while enhancing downtown authenticity. The IDA Authenticity Council writes,

*"Finding new, economically viable uses is crucial for historic buildings that remain in most downtowns to sustaining an area's authenticity. Often within a context of a large building (such as an old warehouse) or a sub-district within a larger downtown (old town), a number of projects have emerged to repurpose old buildings, keeping these physical assets in place while providing new vitality to the area."<sup>23</sup>*

Downtowns have also employed policy measures and creative financing mechanisms as tools to promote affordable housing development. The Downtown Seattle Association (DSA) has a partnership with the mayor's Housing Affordability and Livability (HALA) taskforce, which aims to produce 20,000 new affordable and 30,000 new market-rate units across Seattle by 2025. DSA also campaigned for a successful 2016 citywide housing levy that will fund construction of housing attainable for low-income residents. Other downtowns advocate for increased development to help combat high demand, as seen in Downtown Miami. It is imperative that downtowns advocate for housing affordability using a variety of measures to ensure that downtown remains attainable for households at all income levels.



Reliable, safe, and accessible transit options can also reduce the financial burden of living in downtown. While downtown housing costs are high, mobility costs can be lower than that of suburbs, given proximity to essential services, jobs, and education. Additionally, households in downtowns depend far less on driving cars and far more on public transportation and active mobility (translation: walking and biking). This translates into significant overall savings. A joint study by the Brookings Institution, Center for Transit-Oriented Development, and the Center for Neighborhood Technology concluded that “neighborhood characteristics such as density; walkability; the availability and quality of transit service; convenient access to amenities such as grocery stores, dry cleaners, day care, and movie theaters; and the number of accessible jobs shape how residents get around,

where they go, and how much they ultimately spend on transportation.”<sup>24</sup> While this doesn’t fully solve the issue of housing affordability, reduced transportation costs do reduce the financial burdens on downtown residents.

**While affordable housing and transportation represent key components of any effort to keep downtowns inclusive, ensuring that downtown services and amenities are as diverse as the residents and visitors who frequent downtown plays just as central a role in making sure that downtown remains welcoming.** Place management organizations have an opportunity to encourage existing retailers and property owners to embrace downtown’s heritage and local needs.

## Vibrancy



Downtowns and center cities typically are regional epicenters of culture, innovation, dense public spaces, and commerce. These activities gravitate to downtown due to its density, diversity, identity, and heavy use. Downtown's magnetism grows from its density of employment opportunities, housing, retail amenities, and public realm.

**Employment:** With a mix of land uses including residential options, diverse retail, and an activated public realm, downtown appeals to firms because its vibrancy helps them attract (and retain) employees. With increasing frequency, corporations have relocated their headquarters downtown from suburban settings. Equally significant, startups and innovative tech companies flock to downtowns because of the agglomeration of industries there.

For both groups of businesses, central location, accessibility and walkability make downtowns especially desirable. As an example, downtown Norfolk's transit options, accessibility, talent pool, thriving business climate, and high quality of

life helped attract a Fortune 300 company. The vibrancy of downtown Norfolk's flourishing arts district, the bustling Granby Street with its dozens of independently operated restaurants, the downtown waterfront, and Town Point Park contributed to the attraction.<sup>25</sup>

**Residential Growth:** Most downtowns in this study not only experienced residential growth but had a surge of new residents since 2010. Residential options integrated with a thriving commercial sector has helped downtowns attract millennials and creatives. The country's largest demographic cohort – millennials aged between 18 – 34 – want to live in neighborhoods with the attributes of diversity, creativity, and culture, with lots of places to socialize. Combined with their preference for walkable areas and transit options, these priorities make downtowns extraordinarily appealing to this group, and the numbers show it. College-educated young adults are more likely to live within three miles of a city's downtown core.<sup>26</sup>

**Equity:** As downtowns have attracted highly skilled talent and higher earners, these new residents and workers have exacerbated income disparities. Downtowns can, however, choose to promote equitable development and growth. Development that does not displace long-time residents is an integral component to downtown growth. Equipping all residents with the skills to advance economically can become a central pillar of anti-displacement planning. Place management organization can promote more equitable growth by working to attract and retain a diverse mix of tenants and services that provide goods and services for all households. Place management organizations can take a leadership role in the conversation on equitable development at the local level advocating for inclusion and accessibility.

**Adaptive Reuse:** As residential growth continues, downtowns will have to find creative ways to manage adaptive reuse and infill development of a more historic building stock. Downtowns like Pittsburgh and Baltimore have integrated the adaptive reuse of older Class B and C office space, repurposing them for residential uses.

**Retail:** Downtowns remain key centers of economic activity, supporting a strong concentration of retail activity. The critical mass of residents, employers, and visitors drive retail sales and demand.

*“Retail is an important element in making a downtown livable. The public nature of retailers with their shop windows and accessibility to everyone creates an interesting environment on the streets of downtown that no other use can. Retail also provides ‘eyes on the street,’ that makes an area feel safer. In addition, retailers perform an important function for office workers, but more importantly for residents, by providing needed goods and services.”<sup>27</sup>*

“SUCCESSFUL REGIONS HAVE TRANSFORMED THEIR URBAN CORE WITH A MIX OF USES AND ANIMATED PUBLIC REALMS THAT TRANSLATE DENSITY INTO WALKABILITY.... MOREOVER, THOSE CITIES OFFER THE **VIBRANT STREETS AND ANIMATED PUBLIC SPACES** THAT POPULATION DENSITY SUPPORTS.”<sup>28</sup>

Stantec’s Urban Places





The downtowns in this study support an outsized share of citywide retail, while ground-floor retail simultaneously enhances a vibrant downtown environment by providing eyes on the street, visually stimulating and interesting sites across the public realm, and third places like cafes and restaurants where community members can socialize.

While the retail landscape is changing, urban place management organizations stand as the liaison with downtown retailers, working with property owners to attract and influence what use occupies a space. They actively market available spaces to reduce vacancies and support property owners.<sup>29</sup> While downtowns have encouraged experiential retailers to open storefront locations, the evolving retail environment presents some serious challenges for downtowns. Downtown merchants face threats to their economic vitality from multiple sources, including online retailers, big-box stores, and subscription home-delivery services. Place management organizations can support downtown retailers by providing them with or connecting them to grants, financial stimulus, outreach and marketing efforts, and training.

**Public Realm and Walkability:** A downtown public realm is categorized by mixed-use development, walkable and complete streetscapes, and human-scale design. In turn, the public realm supports a variety of residents, including the elderly, families with young children, and disabled users (planners often refer to “8-80 design” in this context – physical qualities of the public realm that make it safe, easy, and appealing for anyone from ages 8 to 80 to use.) The same characteristics that give downtown its appeal – including density, clustering of stores and services, and walkability – also support lower energy use.

Downtown’s mixed-use environment generally delivers greater returns on investment, as “mixed-use, downtown parcels bring in, on average, five times the property tax revenue as conventional single-use commercial establishments on the outskirts of town.”<sup>30</sup> Focusing on the goal of making downtown a truly walkable, pedestrian-friendly environment – with well-connected streets that have “things to walk to,” significantly improves all aspects of a downtown area.<sup>31</sup> Walkability “solves a number of downtown and city center needs, including transportation



connectivity, aesthetics, access and experience.”<sup>32</sup>

Furthermore, walkability “bolsters the economy, as walkable urban areas can lead to sizeable increases in property values for homeowners and businesses.”<sup>33</sup> Walkable infrastructure requires continued investment focused on improving connectivity and access of multi-modal transportation infrastructure. Improvement districts have the relationship in place with community leaders and should champion projects that require municipal commitments.”<sup>34</sup> Urban place management organizations should continue to focus attention on enhancing the built environment through placemaking and placekeeping strategies, public space activation, events, marketing (including brochures and maps), the addition or improvement of sidewalk amenities and street furniture, and wayfinding.<sup>35</sup> Downtowns are the living room of the city and should continue to position themselves as such.

“PUBLIC SPACES – PERMANENT AND TEMPORARY COMMUNITY-WIDE GATHERING PLACES LIKE PARKS, STREETS, AND PLAZAS – HAVE HISTORICALLY CONTRIBUTED TO DOWNTOWNS’ AUTHENTICITY BY PROVIDING VENUES FOR HALLMARK EVENTS SUCH AS CONCERTS, FESTIVALS, OUTDOOR MARKETS, ART AND STREET FAIRS, AND PARADES. (OR JUST PLACES FOR FAMILY OUTINGS OR QUIET CONTEMPLATION.) COLLECTIVELY, IT IS THESE PUBLIC SPACES, AS-IS OR ACTIVATED, **THAT PROVIDE DOWNTOWNS WITH THEIR DISTINCTIVE SIGNATURES AND DIFFERENTIATE THEM FROM OTHER NEIGHBORHOODS** – THEREFORE CREATING AUTHENTIC CLUSTERS THROUGHOUT THE ENTIRE CITY.”

International Downtown Association

## Identity

A person's view of a city and region usually grows out of that person's experience in a city's and region's historical center for arts, culture, commerce, governance, education, and housing – its downtown. Downtowns often have an authentic connection with a city's founding and earliest history, and their built environment typically offers a visual record of multiple eras. These qualities offer users a place-based experience unlike anything else in the city. The recent cultural emphasis on authenticity – from makers to bespoke items created by 3D printing to a focus on local and seasonal foods – reflects America's growing appetite for deeper connections to their surroundings, including plazas, parks, restaurants, cafes and co-working spaces. An authentic place "will be honest, imperfect, unpretentious, and it will avoid being overly designed and sterile... To achieve a genuine feel, the area should be collaboratively constructed -- meaning those responsible for the space should consider the local community's input and participation in keeping or changing elements."<sup>36</sup>

To maintain authenticity, "place management practitioners must acknowledge and embrace the fact that downtowns are always evolving and must find ways to keep the individual character and feel of their downtown at the forefront of the planning process."<sup>37</sup> Preserving the authentic identity of a downtown in the face of commercial development and investment remains a challenge. Engaging a broadly diverse array of downtown users reinforces downtown's advantage over other, more homogenous neighborhoods. Diverse, cross-cultural community engagement and participation both preserves downtown's historic and authentic characteristics and promotes efforts to making downtown inclusive and authentic. Additionally, promoting and celebrating local artists and creators through placemaking programs further enforces an authentic and unique identity.

As the demand for urban living continues to rise, once historic and singular downtowns have begun to face competition from newly developed and revitalized urban





nodes nearby. These new-growth areas often have lower barriers to entry than established downtowns, with more affordable commercial, retail, and residential space. Equally important, these urban areas tend to boast new amenities that make them not only financially attractive, but aesthetically and experientially attractive. Established downtowns must begin competing with these urban districts as well as walkable suburban town centers.

Place management grew out of efforts by downtowns and urban neighborhoods to respond to demographic changes and suburban flight in the mid-20th century. The place management industry must continue evolving alongside 21st-century demographic trends. Downtowns and downtown district managers understand that their competitive edge lies in offering a unique experience rather than a repeat of what other cities offer.<sup>38</sup> Demands to copy other cities, however -- whether out of skyline envy or the misguided idea that a simple formula will reproduce the growth in other urban nodes -- create pressures on district management organizations. Downtown advocates must continue to balance demands from stakeholders who value authenticity and preservation with pressures for modernization.<sup>39</sup> Embracing the local place and the

“DOWNTOWNS HAVE THEIR OWN SPECIAL CULTURES. ROOTED FIRST AND FOREMOST IN THE ATTITUDES THAT HAVE COME TO PREVAIL DECADE AFTER DECADE, THESE CULTURES HELP SHAPE THE ONE-OF-A-KIND DOWNTOWN IMAGE, AFFIRMING THE BELIEF THAT DIVERSITY IS A STRENGTH, AND ALL ARE WELCOME REGARDLESS OF RACE, AGE, ETHNICITY, GENDER IDENTITY OR INCOME. **THAT UNSHAKEABLE SPIRIT OF OPEN-MINDEDNESS – FOR THE NEXT BIG IDEA OR THE NEXT CRAZY IDEA – IS WHAT HAS ESTABLISHED DOWNTOWNS AS CITY CENTERS FOR CREATIVE THINKERS AND DOERS.**”<sup>43</sup>

International Downtown Association

downtown brand is a key to success. However, balancing heritage preservation and new development is a major challenge for many cities. Communities can quickly become polarized around these issues, and discussion can rapidly degrade to either “development equals destruction of heritage,” or “protecting heritage equals economic decline.” Yet cities can enjoy the best of both worlds, simultaneously achieving heritage protection and economic growth.<sup>40</sup> To balance the past and future, place managers must help steer downtowns to remain authentic -- to keep their histories alive -- while focusing on the future.<sup>41</sup> The place “should be accessible by everyone, and it should be activated by permanent, temporary, or the combination of both uses that are compatible and appropriate to the area’s character and heritage, and collectively contribute to the benefit of the community and the visitors’ experience.”<sup>42</sup>

## Resilience

The mix of people, industries, businesses, and land uses equip downtowns and center cities to adapt to economic, social, and environmental shocks. Consequently, downtowns are critical drivers for a region's resilience, which can disproportionately affect less economically and socially dynamic areas.

**Economic Resilience:** Economically, downtowns derive their resilience from land use, their role as employment hubs, and in the ability to outperform other areas in generating tax revenue. Downtowns have mixed land use. Even in sprawling cities, downtowns remain centers of employment, with typically the highest concentration of workers and office space. The tax revenue generated for the city is highly concentrated, more so than other areas of the region. After the global financial crisis, "the slow realization of the importance of downtowns play in creating and maintaining a resilient economy became a stark reality that could no longer be ignored."<sup>44</sup>





**Social Resilience:** Downtowns typically have high levels of social resilience because of their density, agglomeration, access, diversity, services, opportunity, and centralized infrastructure. Land use patterns and transportation networks in downtown connect people to opportunities, jobs and the region at-large.

Downtowns should capitalize on the method of sustainable development known as asset-based community development, which capitalizes on the strength and potential of local communities. It involves “assessing the resources, skills, and experience available in a community; organizing the community around issues that move its members into action; and then determining and taking appropriate action.”<sup>45</sup> Downtowns are also typically hubs for civic engagement, filled with spaces where citizens can conduct civic dialogue on critical issues and engage in the processes of democracy:

*“The urban core’s power of attraction is rooted in its concentration of exceptional and highly significant functions – those that have a high ratio of human experience to their space demands – be they residences for those who, due to their work or interests, are potentially the most enthusiastic participants in city life, the seat of government representation and key offices of both public and private organizations, and other functions that have an urban, regional, national or international significance.”<sup>46</sup>*

**Environmental Resilience:** Downtown’s environmental resilience is in part due to its mobility, parks, and green space. Mobility is a downtown strength. All of the study downtowns were more walkable, bikeable, and transit-friendly than their city as a whole, and fewer downtown residents drove to work alone. Downtown development entities should pay particular attention to mobility when establishing goals and priorities for economic growth.<sup>47</sup>

As cities grow smarter, and autonomous vehicles become more prevalent, downtowns will have to respond. Smart mobility will have a particularly large impact on downtowns. Downtowns face challenges stemming from car-sharing services, such as increased traffic volume, congestion from curbside pick-up and drop-off circulation, reduced use of (and revenue for) public transit, and many as-yet unknown challenges. Because the mobility landscape is changing both rapidly and unpredictably, local officials have moved with caution in considering transit investments. Downtowns have historically provided leadership on sustainability measures, with a reliance on shared travel modes. Downtowns must continue to lead and explore mobility innovation in scalable, nimble, and sustainable ways, to meet the demands both of their users and of new technologies.

## Conclusion

**Downtowns provide unique contributions to and have inherent value to a city and region.**

This study looked at key data points within the five principles of economy, inclusion, vibrancy, identity and resilience to begin benchmarking the value of U.S. downtowns. The study relied on public and proprietary data sources using a greater understood definition of a downtown geography. Metrics were calculated by change over time, per square mile, and share of city value, allowing IDA to begin calculating and benchmarking the value of downtowns. Two years into the study, with data from 24 downtowns across the U.S., we see increasing evidence on the impact of downtowns to both those who live and work there, and to the greater city and region.

These downtowns highlight the economic role that downtowns play in their cities as centers of tax revenue generation, employment, and commercial real estate. Given downtowns' size in comparison to their metro areas, they represent a significant share of citywide commercial availability, positioning both downtown and city for continued office and job growth. Downtowns make a major contribution to the bottom line of municipalities and generate returns much higher than the percentage of land they take up. Unsurprisingly, downtowns, regardless of size, contribute significantly to their city's overall assessed value, with each square mile in the study downtowns having a higher assessed value than that of the rest of the city. Downtowns also have intrinsic cultural significance to the brand of the region. A blend of the old and new, downtowns provide a high quality of life that attracts employers, investment, visitors, and residents.

Thanks to their expansive base of users, downtowns can support a vibrant variety of retail, infrastructural and institutional uses that offer cross-cutting benefits to the region. Study downtowns represented significant citywide percentages of employment, residential growth, density, amenities, and retail sales. Downtowns and center cities have high potential for inclusion and resilience by providing access to opportunity, essential services, historical assets, culture, recreation, entertainment and participation in civic activities. The mixed-use nature of a downtown allows for residential uses alongside commercial, connected mobility options, and a provision of opportunities and services. It is because of this diversity and density of resources and services that downtowns can better absorb economic, social and environmental shocks and stresses than other parts of a region. The study downtowns exhibited high percentages of demographic diversity as well, with high shares of non-white, middle-income and millennial populations when contrasted to their small geographic size. The challenge will be to ensure that downtowns remain inclusive and accessible to a diverse population and workforce, while continuing to offer a range of services and activities as downtowns become more in demand. While downtowns are positioned to meet these challenges, cities and regions should invest in and support the continued evolution of downtown, thus strengthening the city and region in terms of economic output, inclusion, vibrancy, identity and resilience.

Investing in a strong downtown remains crucial for a successful city and region.

APPENDICES

PROJECT  
METHODOLOGY

PRINCIPLES AND  
BENEFITS

DATA SOURCES

ADDITIONAL IDA  
SOURCES

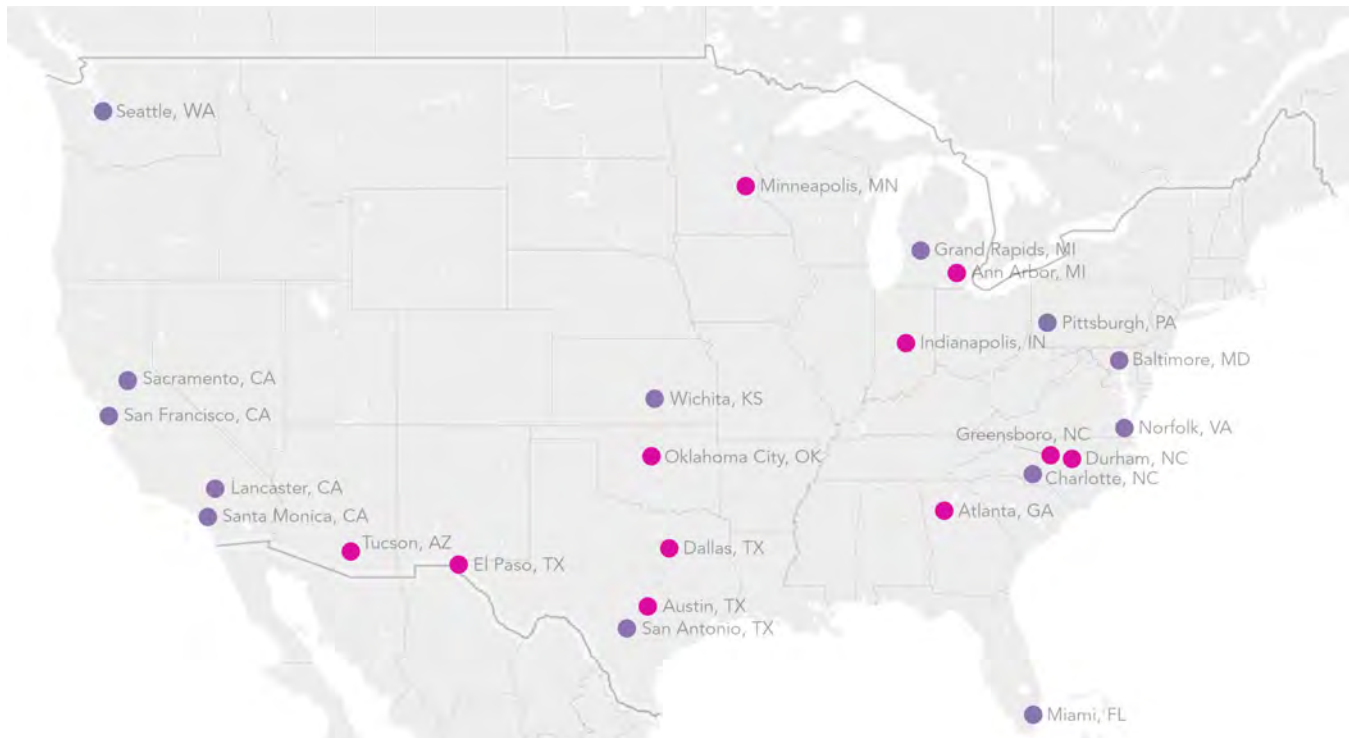
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# Appendix I: Project Methodology

## PROCESS

In 2017, IDA launched the *Value of U.S. Downtowns and Center Cities* study. The IDA Research Committee worked with 13 downtown organizations, Stantec's Urban Places as a project advisor, and HR&A Advisors as an external consultant to develop the valuation methodology and metrics. This year, IDA added another 11 urban place management organizations (UPMOs) and worked with them to collect local data, obtain data from agencies in their cities, and combine these metrics with publicly available statistics on demographics, economy, and housing. Data collected included publicly available census figures (population, demographics, employment, transportation), downtown economic performance, municipal finances, capital projects, GIS data, and the local qualitative context. The downtown partners chosen in both years represent diverse geographic regions and have relatively comparable levels of complexity and relationships to their respective cities and regions.





## PROJECT PURPOSE

The project measured the performance of American downtowns using metrics developed collaboratively and organized under five principles that contribute to a vital urban center. Project aims included:

- Benchmarking performance of downtowns using a replicable, scalable framework.
- Creating a baseline for future data collection to build a growing case for the need for both public and private investment in downtowns.
- Developing a common set of metrics to communicate the value of downtowns.
- Expanding the range of arguments that UPMOs can make to stakeholders based on publicly available data.



## HYPOTHESIS

Despite a relatively small footprint, a downtown has large economic and community impacts, producing multiple benefits for both its city and region. These impacts include higher land values, substantial economic development outputs, return on investment for both public and private sectors, and more efficient use of public infrastructure. These impacts illustrate the critical contribution a downtown makes to a region's economic development, identity and brand, social equity, culture, vibrancy, and resilience.

Guiding questions for this project included:

- What is the economic case for downtowns? What stands out about land values, taxes, or city investments?
- How do downtowns strengthen their regions?
- Can we standardize metrics to calculate the value of a downtown?
- How can downtowns measure their authentic, cultural and historical heritage?
- How does the diversity of a downtown make it inclusive, inviting, and accessible for all?
- What inherent characteristics of downtown make it an anchor of the city and region?
- Due to its mix of land uses, diversity of jobs, and density, is downtown more socially, economically, and environmentally resilient than the rest of the city and region?

## Discussion: What factors make a vibrant downtown?

Downtowns have differing strengths: some function as employment anchors, some as tourist hubs, and some as neighborhood centers. Some are all three. We distilled the factors for measuring the value from attributes common to all downtowns regardless of their specific characteristics. These included fun, diversity, density, creativity, size, economic output, mobility, brand, investment, resilience, health, sustainability, affordability, fiscal impact and accessibility.

Fun	Diversity	Density	Creativity	Size
Economic Output	Mobility	Brand	Investment	Resilience
Health	Sustainability	Affordability	Fiscal Impact	Accessibility



### DETERMINING PRINCIPLES FOR A VITAL DOWNTOWN

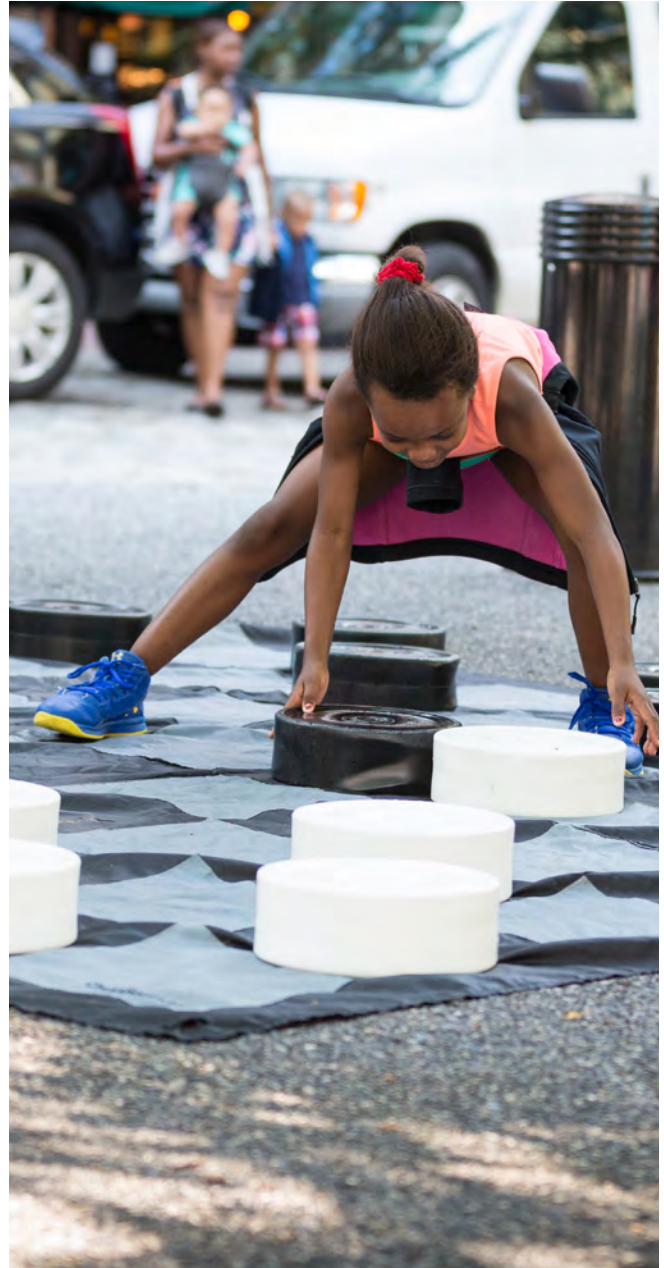
This project began with a Principles and Metrics Workshop held in 2017 with representatives of UPMOs from the initial 13 pilot downtowns. The workshop focused on developing value principles that collectively capture a downtown's multiple functions and qualities. Workshop participants worked to refine values that would speak to each principle that helps make downtown a vital piece of the city and regional puzzle. The participants grouped the value principles into five categories. The principles and the benefits that make downtown valuable provided the basis for determining benchmarking metrics.

Downtown advocates tailor their arguments to the interests of different audiences. For instance, within the economy argument, the figure for sales tax revenue generated downtown would have resonance for government officials but likely wouldn't hold much interest for visitors and workers. For these audiences, a downtown management organization might assemble data showing the types of retail available downtown, whether the offerings meet user needs, and how fully residents, workers, and visitors use these retail establishments. During creation of the data template, the

study team sought arguments that would appeal to multiple audiences and worked to identify metrics that could support multiple value statements. The workshop identified these preliminary value statements:

1. Downtowns are typically the economic engines of their regions due to a density of jobs, suppliers, customers, professional clusters, goods, and services.
2. Downtowns offer convenient access to outlying markets of residents, customers, suppliers, and peers thanks to past and ongoing investment in transportation infrastructure.
3. Downtowns provide a concentration of culture, recreation, and entertainment.
4. Downtowns offer choices for people with different levels of disposable income and lifestyle preferences.
5. Because of their density and diversity, downtowns encourage agglomeration, collaboration, and innovation.
6. Downtowns are central to the brand of the cities and regions they anchor.
7. Downtowns can be more economically and socially resilient than their broader regions.
8. Downtown resources and urban form support healthy lifestyles.
9. Downtowns' density translates into relatively low per-capita rates of natural resource consumption.
10. Relatively high rates of fiscal revenue generation and efficient consumption of public resources mean that downtowns yield a high return on public investment.

These value statements organized and guided development of the full range of metrics for the valuation template. They also helped the workshop participants settle on the five principles the analysis would examine: economy, identity, vibrancy, inclusion, and resilience.



## THE 33 SHARED BENEFITS

Each of the principles comprises a variety of sub-benefits. These helped shape the metrics and arguments used in this study.



## DATA POINTS

This section describes the process of selecting metrics, identifying data sources, and developing arguments for the value of downtown. Building on the workshop's discussion and recommendations, the study team undertook a literature review and extensive analysis of possible additional metrics for evaluating downtowns and center cities. Together, these suggested a set of data points. The study team selected each data point for its ability to articulate the benefit that it provides downtown, and to do so in a robust and replicable method for downtown proponents.

The study team favored data categories that downtown UPMOs already collect or have easy access to:

- Data collected by downtown UPMOs:
  - Retailer information
  - Employer information
  - Development activity
  - Pedestrian counts
  - Events information
- Publicly available data:
  - U.S. Census Bureau
  - Bureau of Labor Statistics
  - State departments of labor
  - HUD State of the Cities Data Systems
  - Municipal assessment data
  - Municipal land use data
  - U.S. Energy Information Administration
  - Bureau of Transportation Statistics
  - FBI crime data
- Proprietary data:
  - Real estate
  - Demographics
  - Labor
  - Economic impacts

Additionally, the team focused on data sources that get updated frequently enough to allow for comparative analysis over time. Other priorities for choosing data sources or determining metrics included the ability to demonstrate downtown value from numerous vantage points. Similarly, different metrics can illustrate similar arguments and can be analyzed in numerous ways to address a single principle or audience. We looked for metrics that could work together to bolster a single argument or make specific points standing alone. In our research, data is most compelling when communicated in relation to another data point and placed in the context of the city or region. Combining these qualities, input from the participants, and best practices seen in other downtown and center-city studies led the team to a final suite of metrics designed to illustrate downtown value.

The primary data source for downtown and citywide residents came from the American Community Survey (ACS) of the U.S. Census. This data provides a point-in-time comparison between a downtown and a city. While some individual UPMOs have access to updated figures for downtown and citywide residential population, this report relied on the ACS to assure consistency across downtowns, and to allow a focus on contextual comparisons.

It's worth keeping in mind the fact that a minor shift in downtown population may seem unusually large when expressed as a proportion if the base population is small. Larger cities might see slower proportional growth, while still densifying rapidly. As with any data source, ACS data estimates may represent one place more accurately than they do another, over- or underestimating population in comparison to locally collected data.



## METRICS SELECTION

To meet the goal of providing metrics that allow comparison across jurisdictions, we made sure necessary data was available for every downtown, city, and region. For each metric, the data template required an input—for example, total workers—and the team then performed calculations to determine related metrics like growth rates, geographic density, employment density, shares of cohort (e.g., workers by educational attainment), and downtown's share of citywide and regional figures.

The team worked to identify a set of replicable, scalable, and accessible metrics for each value statement that could support downtown advocacy to a range of audiences. The assessment tool standardized the choice of baseline metrics, typically already collected by downtown UPMOs, and introduced new metrics that represent an attempt to quantify important but subjective elements such as inclusivity, fun, heritage and memory. To support value statements and identified characteristics, three types of data fully illustrate each argument:

1. Absolute **facts** provide quantitative context and a feel for the scale of the characteristic being used to make the argument.

For example, under economy, a UPMO might want to make the argument that a thriving financial services sector plays a critical role in the city's economy. The number of financial services jobs, their related earnings, and taxes paid represent absolute facts that support this argument.

2. **Indicators** measure an argument at a secondary level by focusing on inputs or outputs and may reflect the subject geography or serve as benchmarks for comparison to peer downtowns or case studies of best practices.

At this level, a UPMO could argue that in addition to their direct economic contribution, financial service jobs in downtown assure stable demand for a range of services and retail offerings at different price points that serve all residents. To make this argument, the downtown management organization might map retail vacancies against concentrations of financial services firms to illustrate the relationship between distance to financial services office nodes and viability of retail.

3. **Qualitative assessments** inject anecdotal context and color into an argument.

For this level, the downtown management organization could include news reports or an interview with the CEO of a major financial services firm that lays out the value they see in locating downtown.

Together, these different types of information allow IDA and the UPMO to communicate downtown's unique value to the city.

Beyond relevance for different intended audiences (including journalists), the study team imposed three additional filters on data sources to account for the varying capacities of UPMOs, the need for future replicability, and a strong interest in tracking performance against peer downtowns. Data needed to be:

1. **Readily available** to most downtown management organizations (and ideally public),
2. **Replicable** (enabling year-to-year comparisons), and
3. **Scalable across jurisdictions**, allowing for benchmarking and regional comparisons.

Applying these standards helped us assemble a set of metrics that allow downtowns to participate equally in the analysis regardless of a UPMO's financial resources or technical ability. IDA provided detailed instructions to participating UPMOs on how to use all the metrics selected. To enable downtown management organizations to use the metrics confidently to promote their downtowns, IDA provided a description of each data source, including frequency and method of collection. We directed the UPMOs to use clear qualifying language to introduce the use of proprietary or "crowdsourced" sources (surveys, Yelp reviews, Instagram posts). We expect most downtowns to rely on similar sources of proprietary data, but participating downtowns may prefer one choice over another (such as CoStar or Xceligent) when obtaining similar data. To the extent possible, data sources should remain consistent across geographic scales (downtown, city, region) and consistent over time for longitudinal analysis.



While the data template and profiles highlight data points for comparison purposes, IDA encouraged each downtown organization to customize its presentation of arguments to highlight the values most relevant to its city and the audiences it wants to reach. For instance, a downtown with a strong transportation system might choose to emphasize transit accessibility in articulating inclusion, while one with little public transportation infrastructure might choose to emphasize the diversity of transit users.

## VALUE PRINCIPLES

IDA and the pilot downtowns identified five value principles as themes for the project: Economy, Inclusion, Vibrancy, Identity, and Resilience. Though the ways downtowns produce value for their cities and regions differ, broadly applied, these statements convey the overarching value of downtowns. Each value statement is supported by multiple metrics and methods of articulation tailored to different audiences. In creating the data template, we worked to identify arguments that would appeal to multiple audiences, and to use metrics to support multiple value statements.

## DEFINING DOWNTOWN

This study developed a definition of the commercial downtown that moved beyond the boundaries of a development authority or a business improvement district. For one thing, geographic parameters vary across data sources and may not align with a UPMO's jurisdiction.

Urban place management organizations vary widely in terms of their geographic definition. To make boundaries replicable and comparable across data sources, the study team recommended aligning each downtown with commonly used census boundaries. In most cases this meant using census tracts, the smallest permanent subdivisions that receive annual data updates under the American Community Survey. They make ideal geographic identifiers, since new data is released regularly, and tract boundaries do not change.

Employing census tracts may not accurately reflect the value of every downtown. In some cases, census block groups more accurately captured the downtown boundaries. Though the Census Bureau occasionally subdivide block groups over time, block groups also receive annual data updates and are compatible with most data sources. We looked to the 2012 publication, *The Value of Canadian Downtowns*, for effective criteria:

1. The downtown boundary had to include the city's financial core.
2. The downtown study area had to include diverse urban elements and land uses.
3. Where possible, we sought hard boundaries such as major streets, train tracks, or geographic features like rivers.
4. An overarching consideration was that data compiled align with selected downtown study areas.

IDA's study *Downtown Rebirth: Documenting the Live-Work Dynamic in 21st-Century Cities* provided further guidelines for defining downtown geography. Recommendations included defining employment nodes at the census tract level; adding census tracts beyond the commercial downtown to define a "greater" downtown, including half-mile and one-mile polygons within the conformal conic projection.

“DEFINING DOWNTOWN BOUNDARIES IS A MAJOR CHALLENGE, AS EACH PERSON LIVING IN A CITY HAS A DIFFERENT UNDERSTANDING OF DOWNTOWN BASED ON THEIR PERSONAL EXPERIENCES.”

International Downtown Association


After determining each downtown's boundaries, the study team calculated resident population within the boundaries using census data; calculated employment levels using Total Jobs data for each tract in the selected areas, and calculated live-work statistics using Primary Jobs data by taking the number of workers who live and work in an area and dividing it by the number of all workers living in the area. Primary Jobs differ from Total Jobs by designating the highest-wage job as the "Primary" one if an individual holds more than one job. Using the Census Bureau's On The Map tool, the study team created maps to show the borders of each area.

Each downtown provided IDA with the geography selection for its downtown, which IDA then worked to refine, given local conditions and UPMO needs. Customized shapefiles or census tracts defined the downtown boundaries. For city and regional boundaries, IDA worked with the downtown management organization to confirm the accuracy of the respective census-designated place or MSA.

## DATA SOURCES

IDA collected the selected data points for all downtowns from the recommended sources and then input them into the data template. Completing the data template necessarily involved a wide range of sources. This section covers preferred sources for demographic, market, labor, and real estate data.

	Demographic + Market Data	Labor Data	Real Estate Data	Municipal Data	Primary Research
Preferred Source	<ul style="list-style-type: none"> <li>American FactFinder</li> <li>ESRI</li> </ul>	<ul style="list-style-type: none"> <li>LEHD on the Map</li> </ul>	<ul style="list-style-type: none"> <li>Costar, Market Reports, Brokers</li> </ul>	Varies	Varies
Other Sources	<ul style="list-style-type: none"> <li>Social Explorer</li> <li>PolicyMap</li> </ul>	<ul style="list-style-type: none"> <li>EMSI</li> </ul>	<ul style="list-style-type: none"> <li>Xceligent</li> </ul>	Varies	Varies

 Covered in this guide

Recommended sources for demographic, market, labor, and real estate data include:

**LEHD On the Map:** The data template requires two datasets from LEHD: (1) an “area profile” of workers in the years 2015 and 2010 and (2) an “inflow/outflow” profile that describes how many workers live in the study area and how many live outside it.

### WHAT IS IT?

An intuitive, easy-to-use mapping and data tool for the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD) dataset.

### WHAT DOES IT DO?

On the Map pulls and aggregates labor data (e.g. employment, workforce composition, commute flows) from the LEHD based on an inputted geography.

### HOW ARE WE USING IT?

LEHD allows UPMOs to define their geographies in census-compatible terms as well as access labor data.

**U.S. Census, American FactFinder:** American FactFinder is the U.S. Census Bureau's publicly available data source. It is a powerful tool for accessing census data. For this study, this source serves as the basis of our demographic and social analysis.

**WHAT IS IT?**

The U.S. Census Bureau's free, public data portal.

**WHAT DOES IT DO?**

American FactFinder pulls and aggregates demographic and social data from the U.S. Census Bureau's decennial census (every ten years) and American Community Survey (every year). Any user can query the American FactFinder for a specific fact or set of facts, a geography, and a time period and receive raw numbers for use in a template.

**HOW ARE WE USING IT?**

FactFinder provides the basis of our demographic and social analysis.

**ESRI Business Analyst:** ESRI Business Analyst is ESRI's tool for retrieving demographic and market data targeted toward business users.

**WHAT IS IT?**

ESRI's proprietary data tool designed for casual and business users.

**WHAT DOES IT DO?**

ESRI Business Analyst allows users to define custom geographies (including drive times) and pull demographic and social indicators as well as proprietary indicators such as retail spending.

**HOW ARE WE USING IT?**

UPMOs will use ESRI to pull retail spending and establishment data, as well as demographic data within an average commute time.

**Real estate market data:** Real estate market data can come from a variety of sources, including real estate data services, which require subscriptions; market reports, available online; and local brokers and economic development agencies, who frequently track real estate information.

**WHAT IS IT?**

Indicators such as absorption, deliveries, vacancy rates, and average rent.

**WHAT DOES IT DO?**

Real estate data, accessed through real estate data services, market reports, or brokers, allows UPMOs to speak to the built form and economy of their downtowns.

**HOW ARE WE USING IT?**

Real estate data, which can come from various sources, is used to make economic and density arguments in the data template.

**Municipal data:** Collected at the municipal level, this data includes information such as local investment, capital projects, tax assessments, tax revenue, crime and safety statistics, and land uses. Agencies collecting this data typically include the mayor's office, the tax assessor's office, planning and zoning, licensing and codes, economic development, and the comptroller's office. These data can flesh out the story of downtown's economic and fiscal impact on the city.

**Downtown stakeholder data:** Data collected from downtown stakeholders at the place management level include bicycle and pedestrian counts, cleanliness and safety statistics, events, major employers, development tracking, residential tracking, surveys, and other insights into the localized place. Downtown management organizations already report many of these statistics in their annual or state of downtown reports.

## DATA TEMPLATE

The data template provided a framework for a three-step process. For this report, IDA first entered static data points from a downtown and data sources for the downtown, city, and region for the current year and a reference year (in this case, 2010). Based on these inputs, the template automatically generated a set of detailed valuation metrics. IDA then linked the outputs to final profiles, using the statistics to construct value statements on the significance of downtowns.

## THE DATA TEMPLATE WAS CREATED WITH SEVERAL PURPOSES IN MIND:

Provide a **common set of metrics** to communicate the value of downtown.

Expand the **range of arguments** UPMOs can make to their stakeholders using publicly available data.

Save **time and effort** by automating portions of analysis.





Enter value for downtown, city, and region

Computed automatically

Selected and refined by downtowns

**INPUTS**

- Total land area
- Number of jobs

**OUTPUTS**

- Jobs per mi<sup>2</sup> downtown vs. city (dividing jobs by total land area)
- Growth in jobs over time (comparing 2010 to the current year)
- Percentage of city jobs (dividing downtown jobs by city jobs)

**ARGUMENTS**

"As the economic engine of the city, downtown has a density of jobs nearly three times the city average, a rate of job growth twice the city average, and nearly 40 percent of total city jobs."

For each static data point entered, the "outputs" tab of the data template contained calculations that compared and normalized metrics across time and geography, including:

- Change since 2010
- Value per square mile
- Value per acre
- Value per resident
- Value per worker
- Share of cohort
- Share of city
- Share of region (for some data points)

The selected data had to communicate the arguments for downtown while being scalable, compelling, and replicable across jurisdictions. The metrics underpin a framework designed to strengthen the advocacy that the downtown management organizations already undertake by creating arguments relevant not only to downtown allies but to stakeholders not yet convinced.

The final methodology, informed by experts and downtown leaders, encompasses more than 100 key data points, 33 benefit metrics, and nine distinct audiences. It evaluates the results through the lenses of the five principles of economy, inclusivity, vibrancy, identity, and resilience. The resulting study articulates the value of downtown as a place, highlighting its unique contributions and inherent value for the local city and region.

Every downtown featured in this report has its own history, culture, land use patterns, and politics. Some may play multiple roles based on their economic performance within the wider city, and these contextual differences should always be kept in mind. IDA organized this project to assess and summarize how each downtown relates to the valuation methodology through the principles of economy, inclusion, vibrancy, identity, and resilience.

## Making The Case: Audiences

Each metric can demonstrate various benefits and support various value statements, but different stakeholder groups will weigh benefits differently. UPMOs can customize their arguments for various audiences and stakeholder groups with a “Value Statements” template. Based on feedback from the pilot downtowns, IDA proposes focusing on these key audiences:

- Local government (representing downtown)
- Local government (representing outlying areas)
- State and regional government
- Business
- Philanthropy
- Residents
- Visitors
- Workers
- Media



### DISCUSSION: WHO NEEDS TO UNDERSTAND THE VALUE OF DOWNTOWNS?



#### GOVERNMENT

- City
- Regional
- State
- Federal
- Local + State Economic Development



#### BUSINESS

- Employees
- Retailers
- Organization members



#### PEOPLE

- Workers
- Residents
- Visitors



#### PHILANTHROPY

- Foundations
- Non-Profits
- Services



#### MEDIA

- Local
- National
- Specialty

**Each downtown management organization can select the audiences it needs to reach based on its priorities:**

**State and regional government:** Outside the city limits, regional and state government officials also have a major stake in a strong downtown. They focus on both the health of the regional economy, which downtowns often anchor and fuel, and on the experiences of their constituents, who frequently visit downtown and benefit from access to centers of employment, government, culture, and recreation. These officials may have acted as downtown advocates or supporters, yet political pressures can also push them toward the view that downtown receives too much money relative to its size and population.

**Businesses:** Retailers and corporations have long seen locating downtown as an attractive way to expand access to customers and talent. Downtown also offers them increased visibility, brand enhancement, and agglomeration benefits from proximity to professional clustering, partners, suppliers, and, often, transportation infrastructure. Though the extent to which downtown serves as a center of commerce varies from city to city, making the case for these benefits is key to attracting business investment.

**Philanthropy:** Philanthropic organizations play a key role in many downtowns, funding capital investment and the provision of social services to underserved residents. Philanthropic groups may approach downtown both as a policy goal (i.e., investing directly in downtown) and as a vehicle to help achieve other policy goals efficiently and equitably.

**Residents:** An increased downtown residential population supports investment, represents an engaged political constituency, and can be a potential source of downtown advocates. Residents move downtown for a vibrant quality of life and proximity to jobs, services, culture, and recreation. By making the case for downtown value to current and prospective downtown residents, UPMOs can motivate this population to generate political pressure for continued investment.

**Visitors:** This group includes tourists, business travelers, and suburban constituents of the state and regional elected officials described above. They travel downtown for access to commerce, culture, and recreation. As with downtown residents, their positive transactions, experiences, and memories can spur them to advocate for continued downtown investment.

**Workers:** Many downtowns serve as their region's central employment center. Workers often like working downtown jobs because they can choose among multiple modes of transportation and have access to broad entertainment, dining, recreation, and shopping options. Residing across the region, these workers represent a potentially powerful political ally in advocating for downtown investment, driven by their interest in downtown's accessibility, retail offerings, and safety.

**Media:** Although often based in downtown, media may not view themselves as having a direct stake in a strong downtown. However, they influence many other key stakeholders by functioning as a conduit of information and the filter through which audiences learn about downtown. Aside from addressing particular audiences, arguments promoting downtown need to be delivered in ways that make them easy for the media to understand and promulgate.

		LOCAL GOVERNMENT (REPRESENTING DOWNTOWN)	LOCAL GOVERNMENT (REPRESENTING OUTLYING AREAS)	STATE AND REGIONAL GOVERNMENT	BUSINESSES	PHILANTHROPY	RESIDENTS	VISITORS	WORKERS	MEDIA
ECONOMY	ECONOMIC OUTPUT	MOST RELEVANT	MOST RELEVANT	MOST RELEVANT	MOST RELEVANT	LESS RELEVANT	LESS RELEVANT	LESS RELEVANT	LESS RELEVANT	RELEVANT
	INVESTMENT	MOST RELEVANT	RELEVANT	MOST RELEVANT	RELEVANT	LESS RELEVANT	RELEVANT	LESS RELEVANT	LESS RELEVANT	RELEVANT
	CREATIVITY/ INNOVATION	RELEVANT	RELEVANT	RELEVANT	MOST RELEVANT	RELEVANT	RELEVANT	LESS RELEVANT	LESS RELEVANT	RELEVANT
INCLUSION	DIVERSITY	MOST RELEVANT	RELEVANT	RELEVANT	LESS RELEVANT	MOST RELEVANT	MOST RELEVANT	LESS RELEVANT	RELEVANT	RELEVANT
	AFFORDABILITY	MOST RELEVANT	RELEVANT	RELEVANT	LESS RELEVANT	RELEVANT	MOST RELEVANT	RELEVANT	RELEVANT	RELEVANT
VIBRANCY	SPENDING	MOST RELEVANT	RELEVANT	MOST RELEVANT	RELEVANT	LESS RELEVANT	LESS RELEVANT	LESS RELEVANT	LESS RELEVANT	RELEVANT
	FUN/UTILIZATION	MOST RELEVANT	MOST RELEVANT	LESS RELEVANT	RELEVANT	RELEVANT	MOST RELEVANT	MOST RELEVANT	MOST RELEVANT	RELEVANT
RESILIENCE	SUSTAINABILITY	MOST RELEVANT	RELEVANT	RELEVANT	LESS RELEVANT	MOST RELEVANT	RELEVANT	LESS RELEVANT	LESS RELEVANT	RELEVANT
	HEALTH	MOST RELEVANT	RELEVANT	RELEVANT	LESS RELEVANT	MOST RELEVANT	MOST RELEVANT	LESS RELEVANT	LESS RELEVANT	RELEVANT
	DIVERSITY	MOST RELEVANT	RELEVANT	RELEVANT	LESS RELEVANT	MOST RELEVANT	MOST RELEVANT	LESS RELEVANT	RELEVANT	RELEVANT
IDENTITY	VISITATION	MOST RELEVANT	RELEVANT	MOST RELEVANT	RELEVANT	RELEVANT	RELEVANT	MOST RELEVANT	LESS RELEVANT	RELEVANT
	TRADITION HERITAGE/MEMORY	RELEVANT	RELEVANT	RELEVANT	LESS RELEVANT	RELEVANT	MOST RELEVANT	MOST RELEVANT	LESS RELEVANT	RELEVANT
	FUN/UTILIZATION	MOST RELEVANT	MOST RELEVANT	LESS RELEVANT	RELEVANT	RELEVANT	MOST RELEVANT	MOST RELEVANT	MOST RELEVANT	RELEVANT

## Appendix II: Principles And Benefits

**ECONOMY:** Within their regions, downtowns have substantial economic importance.

Downtowns and center cities make up a small share of their city's land area, but they have substantial regional economic significance. As traditional centers of commerce, transportation, education, and government, downtowns frequently serve as economic anchors for their regions. Because of a relatively high density of economic activity, investment in the center city provides a higher level of return per dollar than it does in other parts of the city. Just as regional economies vary, so do the economic profiles of center cities—the relative concentration of jobs, economic activity, retail spending, tax revenue, and innovation varies among downtowns and center cities. Comparing the economic role of downtowns and center cities in the context of their city or region highlights their unique value, as well as for setting development policy going forward.

**Benefits of Economy:** Economic Output, Economic Impact, Investment, Creativity, Innovation, Visitation, Spending, Density, Sustainability, Tax Revenue, Scale, Commerce, Opportunity, Scale

### Illustrative Metrics and Standards of Comparison:

- Total assessed value (square footage, average)
- Total property tax revenue
- Total hotel tax revenue
- Total parking tax revenue
- Total sales tax revenue
- Total income tax revenue
- Total public-investment expenditure (\$), capital investment (\$)
- Total private investment (\$)
- Total worker population (per square mile, city share)
- Total worker population by age
- Total worker population by industry (two-digit NAICS)
- Percentage of citywide jobs located downtown
- Employment share, including percentage of knowledge jobs and creative jobs
- Office vacancy rates
- Office market (square footage, per square mile, city share)
- Total office inventory (square feet, city share)
- Total office deliveries (square feet)
- Average office vacancy rate (percentage)
- Average office rent (square footage, year)
- Total corporate headquarters



**INCLUSION:** Downtowns invite and welcome all residents of the region (as well as visitors from elsewhere) by providing access to opportunity, essential services, culture, recreation, entertainment, and participation in civic activities.

Downtowns are inherently equitable because they connect a range of users to essential elements of urban life, including high-quality jobs, essential services, recreation, culture, public space, and civic activities. Though offerings vary, downtowns consistently display the qualities of density, accessibility, and diversity.

**Benefits of Inclusion:** Equity, Diversity, Affordability, Civic Participation, Civic Purpose, Culture, Mobility, Accessibility, Tradition, Heritage, Services, Opportunity

**Illustrative Metrics and Standards of Comparison:**

- Employment diversity
- Demographic characteristics of downtown workers compared to the citywide workforce
- Distribution of jobs by industry, education level, salary
- Total worker population (by earnings)
- Total worker population (by race and ethnicity)
- Residential educational attainment
- Racial diversity
- Total foreign-born residents
- Median household income
- Middle-class residents (percentage and growth)
- Average monthly residential rent (square footage, city share)
- Median home value for owner-occupied housing units
- Percentage of downtown land reserved for public, institutional, or civic use
- Presence of major regional attractions (qualitative)
- Diversity of land use (percentage of commercial use)

“INCLUSION IS ONE OF MANY COMMON CHARACTERISTICS OF VIBRANT AND THRIVING DOWNTOWNS ACROSS THE NATION. SO WHAT EXACTLY DOES INCLUSION MEAN? IT MEANS THAT DOWNTOWNS INVITE AND WELCOME ALL RESIDENTS AND VISITORS BY PROVIDING ACCESS TO OPPORTUNITY, ESSENTIAL SERVICES, CULTURE, RECREATION, ENTERTAINMENT AND PARTICIPATION IN CIVIC ACTIVITIES. GREAT DOWNTOWNS ARE INHERENTLY EQUITABLE BECAUSE THEY ENABLE A DIVERSE RANGE OF USERS TO ACCESS ESSENTIAL ELEMENTS OF URBAN LIFE. THESE ELEMENTS INCLUDE, BUT ARE NOT LIMITED TO, HIGH-QUALITY JOBS, RECREATION, CULTURE, USE OF PUBLIC SPACE, FREE PASSAGE, AND CIVIC PARTICIPATION. PERHAPS MORE IMPORTANTLY, DOWNTOWNS ARE THE PLACES WHERE WE SHOULD EXPECT TO EXPERIENCE THE DIVERSITY SO UNIQUELY APPEALING TO PEOPLE EVERYWHERE.”

Centro San Antonio

**VIBRANCY:** Thanks to a wide base of users, downtowns and center cities can support a variety of retail, infrastructure, and institutional uses that offer broad benefits to the region.

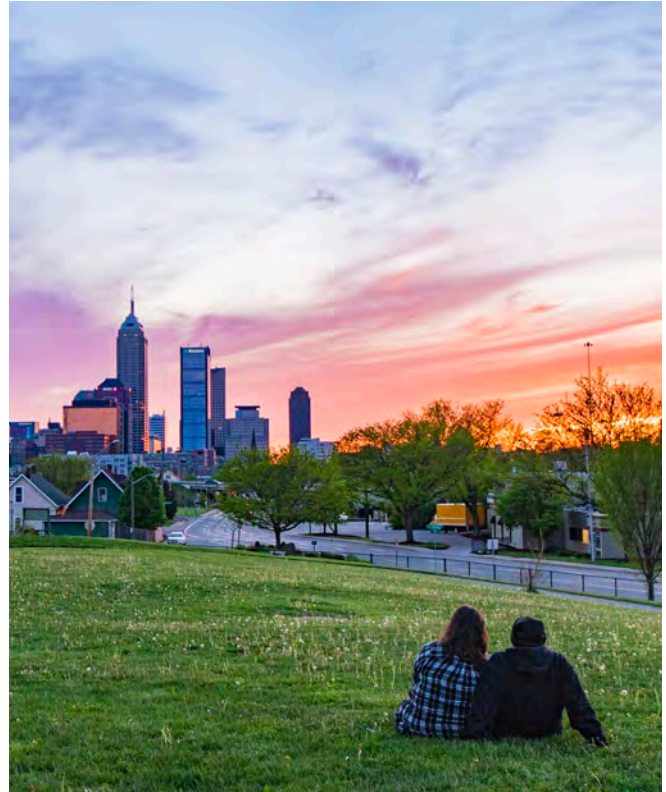
Many unique regional cultural institutions, businesses, centers of innovation, public spaces, and activities are located downtown. The variety and diversity of offerings respond to the regional market and reflect the density of downtown development. As downtowns and center cities grow, their density—of spending, users, institutions, businesses, and knowledge—allows them to support critical infrastructure, such as public parks, transportation services, affordable housing, or major retailers that can't function as successfully elsewhere in the region.

**Benefits of Vibrancy:** Density, Creativity, Innovation, Investment, Spending, Fun, Utilization, Brand, Variety, Infrastructure, Celebration

An engaging downtown “creates the critical mass of activity that supports retail and restaurants, brings people together in social settings, makes streets feel safe, and encourages people to live and work downtown because of the extensive amenities.”<sup>1</sup>

#### Illustrative Metrics and Standards of Comparison:

- Total annual retail sales (per square foot, per resident, city share)
- Total retail demand (per resident, per square mile, city share)
- Average retail vacancy rate (percentage)
- Average retail rent (square footage/year)
- Total number of retail businesses (per square mile, city share)
- Total number of destination retail businesses (per square mile, city share)
- Total number of food and beverages (per square mile, city share)
- Presence of unique retailers or attractions (qualitative)
- Total resident population by race and ethnicity
- Total resident population by age
- Total resident population by education
- Total resident population by income
- Presence of major universities, hospitals, or other institutions (qualitative)
- Future capital investment projects (qualitative)
- Resident and employee growth
- Total residential inventory (units)
- Total residential deliveries (units)
- Average residential rent (square footage/month)
- Average daily pedestrian traffic (and methodology)
- Total annual visitors
- Total annual visitor spending
- Total annual downtown venue attendance



**IDENTITY:** Downtowns preserve the heritage of a place, provide a common point of physical connection for regional residents, and contribute positively to the brand of the regions they represent.

Combining community history and personal memory, a downtown's cultural value plays a central role in preserving and promoting the region's identity. Downtowns and center cities serve as places for regional residents to come together, participate in civic life, and celebrate their region, which in turn promotes tourism and civic society. Likewise, the "postcard view" visitors associate with a region is virtually always an image of the downtown.

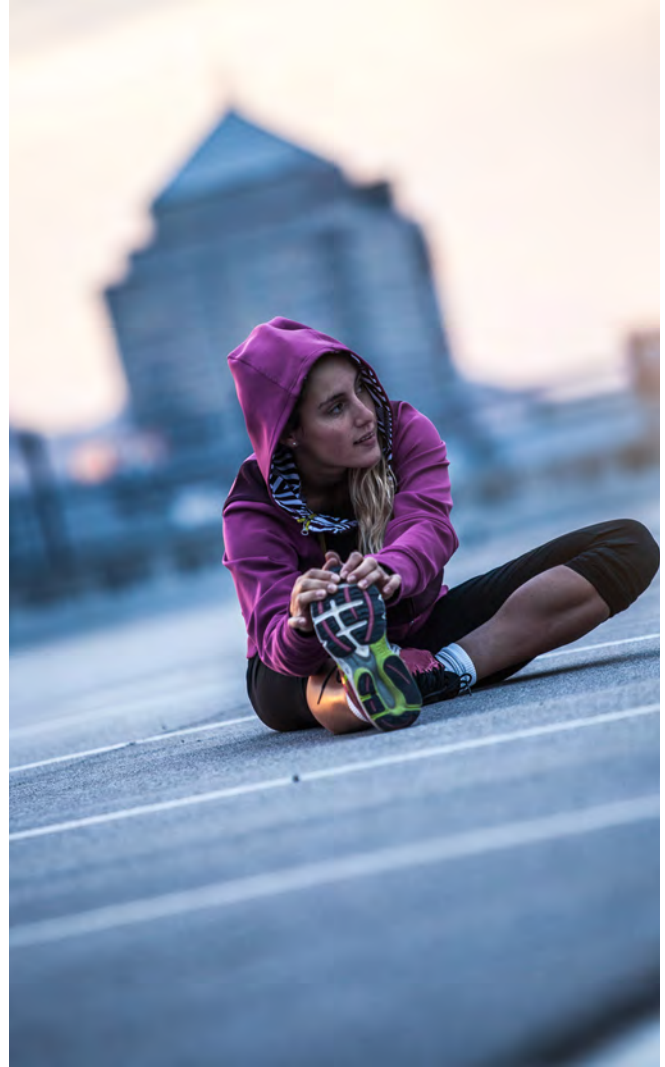
**Benefits of Identity:** Brand, Visitation, Heritage, Tradition, Memory, Celebration, Fun, Utilization, Culture

Downtown preserves heritage, connects regional residents, and contributes positively to the regional brand.

Downtowns are "iconic and powerful symbols for a city and often contain the most iconic landmarks, distinctive features, and unique neighborhoods. Given that most downtowns were one of the oldest neighborhoods citywide, they offer rare insights into their city's past, present and future."<sup>2</sup>

#### Illustrative Metrics and Standards of Comparison:

- Types of destinations, events, traditions (qualitative)
- Total annual visitation figures
- Total number of events and outdoor events per year
- Total number of event venues
- Total hotels and hotel rooms
- Average hotel occupancy rate
- Total number of annual conventions and convention attendees
- Number of and attendance at museums and attractions
- Total number of public art installations
- Total number of registered historic structures
- Total number of farmer's markets
- Total number of sports stadiums, sports teams and annual sporting events
- Total number of publicly accessible playgrounds and pools
- Total place-based Instagram tags
- Media mentions/perception (qualitative)



**RESILIENCE:** Because of their diversity and density of resources and services, downtowns and their inhabitants can better absorb economic, social, and environmental, shocks and stresses.

Resilience, broadly defined, represents a place's ability to withstand shocks and stresses. Because of the diversity and density of resources and services, center cities and their inhabitants can better absorb economic, social, and environmental shocks and stresses than their surrounding cities and regions. The diversity and economic strengths of downtowns and center cities equip them to adapt to economic and social shocks better than more homogenous communities. Consequently, they can play a key role in advancing regional resilience, particularly in the wake of economic and environmental shocks that disproportionately affect less economically and socially dynamic areas.

**Benefits of Resilience:** Health, Equity, Sustainability, Accessibility, Mobility, Services, Density, Diversity, Affordability, Civic Participation, Opportunity, Scale, Infrastructure

A downtown's diversity and density of resources and services put it in a better position to absorb economic, social, and environmental, shocks and stresses than other parts of a region. Research reveals that "in comparison to other parts of the new American city, namely suburbs and edge cities, preliminary evidence reveals that downtowns have been a little more resilient during the downturn and possess certain sectors with the potential for recovery."<sup>3</sup> Not only does density create an economically productive result, urban density leads to efficiencies that suburban and less-urban areas can't replicate. Downtown density makes it more walkable, bikeable, and transit-friendly. Center city density produces highly efficient land use, with taller office buildings whose compact footprints cover much less land than the sprawling office parks located in suburbs. Inherent in downtowns and center cities, these efficiencies contribute to downtown's overall resilience.

Another crucial aspect of resilience is social resilience. Downtowns and center cities gain social resilience from their diversity, density, and access to public gathering places. Research by the George Washington University School of Business shows that walkable urban places typically have greater diversity, a higher proportion of low-income people,

and lower racial segregation than drivable sub-urban areas.<sup>4</sup> Related research finds a positive relationship among walkable urbanism, economic performance, and social equity, but researchers caution that these findings don't negate growing concern about affordability or the urgency of developing public policy to address this concern.<sup>5</sup>

#### Illustrative Metrics and Standards of Comparison:

- Average monthly residential rental rates
- Average residential housing costs
- Attainable middle-class rental rates
- Total rent or owner-cost burdened residents (city share)
- Percentage of city's residents in poverty
- Percentage of city's renter households
- Mix of real estate and land uses: retail, residential, hotel, office
- Total number of community centers, libraries, and religious institutions
- Total number of parks (city share, per square mile)
- Total residents living within half a mile of a park
- Total acreage or square miles of public-access open space in downtown
- Average travel time to work
- Commute-to-work figures (transit, carpool, walk, bike, single-occupancy vehicle)
- Average Bike Score; average Transit Score; average Walk Score
- Total bike share stations
- Total car share services
- Total electric car-charging points
- Total LEED-certified buildings

# Appendix III: Data Sources

## DATA SOURCES FOR THE VALUE OF U.S. DOWNTOWNS AND CENTER CITIES

Source	Data Available	Pricing	Geographic Limitations	Release Schedule
ESRI	Demographic, Housing, Detailed Establishments and Consumer Spending	Proprietary	None; allows for drawing of custom geographies; selection of sub-geographies down to census tracts	Most data available to most recent American Community Survey year; some data available in current year
EMSI	Labor: workers and firms	Proprietary	Allows for selection of sub-geographies at the state, MSA, city, and zip code level	Data available in current year
Social Explorer	Demographic, Housing, Crime, Health	Proprietary	Allows for selection of sub-geographies down to the census block group level	ACS data released annually
PolicyMap	Demographic, Housing, Crime, Health	Proprietary; some features public	Allows for selection of sub-geographies down to census tracts	Varies by data product
American FactFinder	Demographic, Housing, Crime, Health	Public	Allows for selection of sub-geographies down to the census block group level	Data released annually
LEHD On The Map	Labor: workers and firms	Public	None; allows for drawing of custom geographies; selection of sub-geographies down to census block group level	Data released annually and quarterly
Bureau of Labor Statistics	Labor: workers and firms	Public	Most data products are available at the state level, some at the county level, a few at the MSA level.	Varies by data product
State Departments of Labor	Labor: workers and firms	Public	Most data products are available at the county level; some at the zip-code level.	Varies by data product
CoStar	Real estate: development, rents, vacancy, absorption	Proprietary	None; allows for drawing of custom geographies	Data available in current year
Municipal Data Portals	Varies by city	Public	Varies by data product	Varies by data product
HUD State of the City Data Systems (SOCDS)	Housing statistics; building permits; affordable units	Public	Data available at municipal level, county level, state level	Data released annually

# Background: Additional IDA Sources

**Quantifying the Value of Canadian Downtowns: A Research Toolkit (2016):** This toolkit represents a groundbreaking effort to provide a common set of data and processes that will help Canadian place management organizations, such as BIAs/BIDs, establish and sustain evaluation and compare progress among downtowns. While geared toward Canadian downtowns, the toolkit has value for urban districts outside of Canada looking to move toward data standardization and best practices. In the toolkit, organizations will find directions and insights on collecting, organizing, storing, and presenting downtown-specific data to make the case for continued investment and support. The toolkit includes instructions and rationale for the choice of data metrics, and it recommends core, trend and pulse metrics. The kit organizes the core indicators around the principles of visibility (unique identity, brand, definition); vision (leadership, planning, collaboration); prosperity (economic data); livability (residential and uses); and strategy (types and values of public investment). The core indicators are population density (downtown/city); job density (downtown/city); number of new commercial, residential, and mixed-use buildings; current value assessment of downtown properties (commercial, residential, institutional); capital investment (downtown/city); transportation modal split; number of large-format grocery stores; amount invested in parks and public realm; and number of annual cultural events and festivals.

**The Value of Investing in Canadian Downtowns (2013):** This study provides an extensive portrait of the contributions made by downtown areas across Canada, highlighting innovative approaches to revitalization and efforts being applied across the nation. It builds on an initial study phase, completed in 2012, that examined ten of those downtowns, and tracks population, population density, job density and average block size of the downtown core and the municipality. The study organized data under visibility, vision, prosperity, livability and strategy.

**Creating a State of Downtown Report (2012):** State of downtown reports serve two major purposes. First, they build on annual reports to show how downtown organizations

produce quantifiable improvements in various areas of downtowns. This work doesn't just mean cleaner downtowns or more events; it translates into success in all areas of a downtown. Second, a downtown report serves to attract further investment by showcasing downtown as a thriving environment and profitable place to invest. State of downtown reports offer investors data they need to make informed decisions about potential investments. Common categories of indicators include office market, employment, residential market, residential demographics, retail and restaurants, nightlife, tourism and hospitality, events, arts and culture, transportation, development and investment, sustainability, and education.

**Defining Downtowns - Downtown Rebirth (2013):** This policy paper represents the culmination of a year-long effort by IDA and partners to develop an effective way of quantifying how many people live and work in and around 231 job centers in 150 American cities. Without standard geographic definitions for downtowns and downtown residential neighborhoods, previous research relied on overly simplified boundaries that didn't capture the idiosyncratic shapes of urban employment nodes and thus failed to capitalize fully on existing federal data. For the first time, *Downtown Rebirth* suggests a way both to define and quantify downtown workforce and population numbers and document how these employment hubs and live-work environments are changing.

The *Value of U.S. Downtowns & Center Cities* study expands on the efforts of IDA's *Downtown Rebirth: Documenting the Live-Work Dynamic in 21st Century Cities* study, which provided guidelines for selecting downtown boundaries. This study uses these recommendations to define downtown beyond the boundaries of a district management organization using a definition of downtown commonly understood by those in that community. For a small sample of downtowns in this study, IDA also expands upon and updates the data from the *Downtown Rebirth* report.

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