The Value of U.S. Downtowns and Center Cities

CALCULATING THE VALUE OF DOWNTOWN DURHAM, NORTH CAROLINA
A 2018 IDA STUDY

A 2018 PUBLICATION CREATED BY
THE INTERNATIONAL DOWNTOWN ASSOCIATION

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ABOUT IDA

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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**.

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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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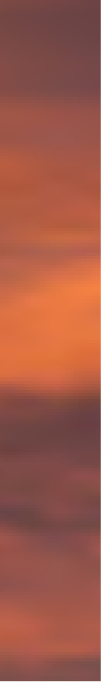

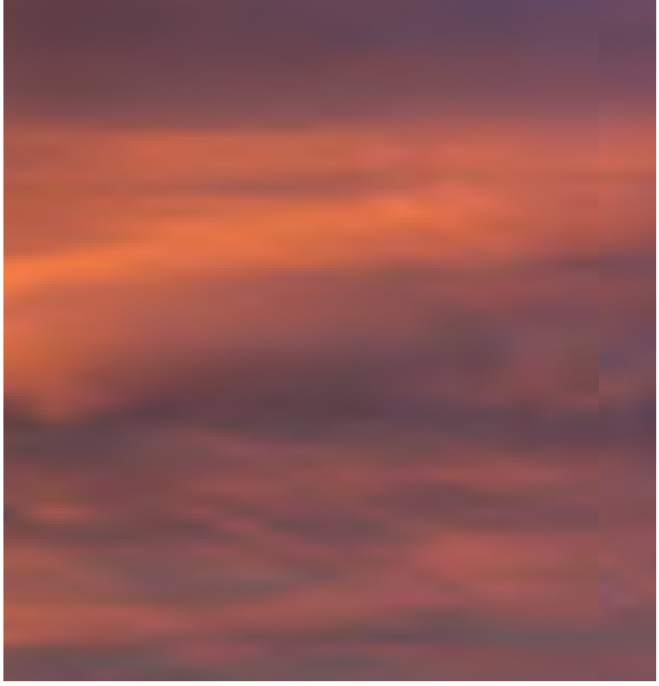

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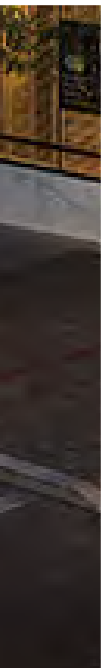

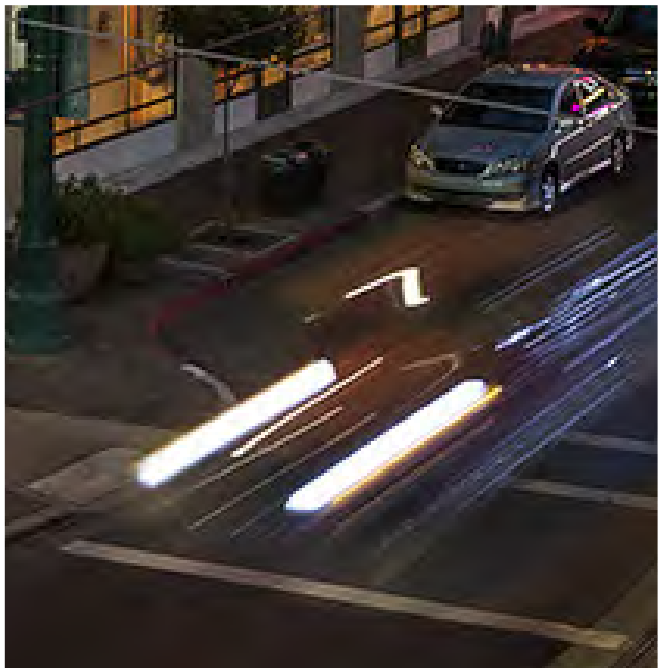

SECTION ONE

PROJECT OVERVIEW

1

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."[1] 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.[2] 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.

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Methodology Overview[i]

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

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.

i 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.

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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."*[5]

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."[6]

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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.

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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

DOWNTOWN PROFILE

2

Downtown Profile | Overview

A city's strength and prosperity depend on a strong downtown and center city, which serve as centers of culture, knowledge, and innovation. The performance of downtowns and center cities strengthens the entire region's economic productivity, inclusion, vibrancy, identity, and resilience.

Downtown Durham has enjoyed ongoing and accelerating revitalization over the past two decades, facilitated by strategic, meaningful redevelopment projects. Significant investment in new construction and historic renovation has brought new life and economic growth to a downtown left behind by tobacco and textile manufacturing. Durham has been especially successful in attracting students and young professionals with its proximity to renowned schools, affordable cost of living, growing job market, rich cultural amenities, and laid-back attitude. The downtown district itself is 0.76 square miles. The larger central Durham study area, at 2.92 square miles, makes up 2.6% of the city's land area.

With Raleigh and Chapel Hill, Durham constitutes one of the three points defining the Research Triangle, or simply "the Triangle." Initially this referred narrowly to three major universities: North Carolina State in Raleigh, the University of North Carolina at Chapel Hill, and Duke University in Durham. Their combined 8,500 annual graduates serve as a major attraction for businesses seeking educated talent.[1] Innovative research and high-tech companies have powered the region's economic growth and contributed to the growth of downtown as new residents and employees have sought a more active and vibrant environment.

In 2016, the population of central Durham totaled just under 10,700, up from 8,500 in 2010. This 26% increase far exceeded the city and regional growth of 14% and 11% respectively. The downtown district itself has an estimated population of 4,557, with 3,500 additional residents expected once 2,000 apartments in the development pipeline are completed.

Study Area

DOWNTOWN PARTNER
Downtown Durham, Inc.

CITY
Durham, NC

Residential Population

	Population	Share of City	Residents/Sq. Mile	Growth Since 2010
Downtown	4,557	1.8%	5,996	N/A
Central Durham	10,667	4.2%	3,653	26%
City	251,761	N/A	2,268	14%
Region	542,399	N/A	299	11%

Employment Population

	Workers	Share of City	Workers/Sq. Mile	Growth Since 2010
Downtown	19,541	13%	25,847	55%
Central Durham	21,262	15%	7,282	50%
City	146,431	N/A	1,319	11%
Region	266,878	N/A	147	8%

Downtown contains 13% of citywide jobs, and numerous office developments have allowed for rapid job growth. Employment grew by more than 50% from 2010 to 2015, and 25% of all downtown jobs fall in sectors classified as knowledge industries. Downtown boasts a high concentration of jobs, with nearly 26,000 workers per square mile compared to 1,300 workers per square mile citywide. The vast majority of jobs in central Durham are concentrated in the smaller downtown district.

Inventory

	Downtown*	Per Sq. Mile
OFFICE (SF)	3.1M	4.2M
RESIDENTIAL (UNITS)	2,848	3,747
HOTEL (ROOMS)	716	942

*These figures are for the 0.76 square mile Durham downtown core, not the full study area of 2.52 square miles.

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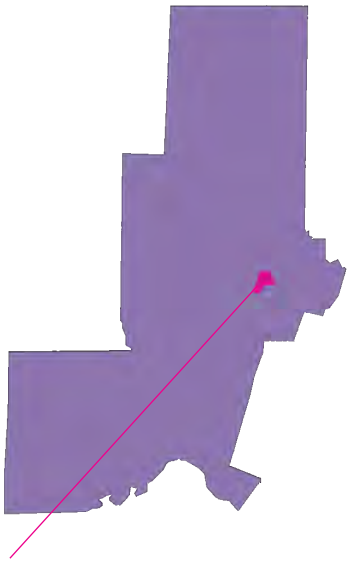
Defining Boundaries

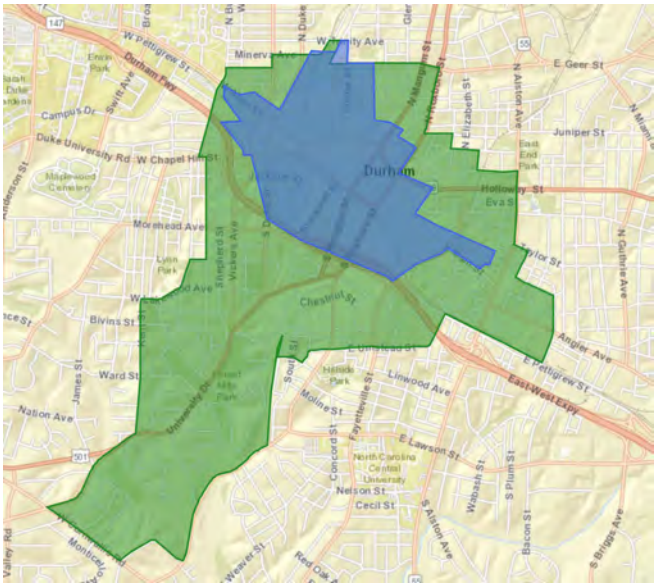
The study area extends beyond the boundaries of downtown's business improvement district, as geographic parameters vary across data sources and don't typically align with a place management organization's jurisdiction. IDA recommended that the urban place management organizations participating in this study use the commonly understood definition of downtown and match boundaries to hard edges, roads, water, natural features or highways. IDA worked with each group to align its downtown study area with census tract boundaries for ease of incorporating publicly available data from the U.S. Census.

We defined the "central Durham" study area as the area roughly bounded by Geer Street on the north, Alston Avenue on the east, Cornwallis Road and Umstead Street on the south, and Buchanan Boulevard on the west. This includes census tracts 7, 11, 22, and 23. Social and demographic data reflected in this report, unless otherwise noted, is gathered from these four census tracts. Data for select metrics was only available for the downtown business district, which we refer to as "downtown." The city is defined as the City of Durham, and the region is the Durham-Chapel Hill Metropolitan Statistical Area.

IDA measured multiple factors within each principle, focusing on trends and growth over time and how downtown compared to the city and the region. These five central principles—economy, inclusion, vibrancy, identity, and resilience—were identified in workshops with the first cohort of urban place management organizations evaluated for this study. Page 44 in Appendix 1 lays out the principles and 33 sub-benefits used to choose the study's metrics. Our goal was to build a deeper understanding of central Durham's contribution to citywide and metro-area performance across a range of areas.



Downtown Share of City Land Area



The study area for central Durham appears in green, and the downtown district in blue.

Economy | Impact, Innovation

Downtowns make up a small share of their city's land area but have substantial economic importance.

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. 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.

A downtown's diversity and density of resources and services better position it to absorb economic shocks and stresses than suburbs and less-dense regions. Research suggests that, when compared to suburbs and edge cities, "downtowns have been a little more resilient during the downturn and possess certain sectors with the potential for recovery."[2]

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

An emerging economic center, central Durham serves as a growing employment and entertainment district. **On average, land in downtown Durham is worth $106 million per square mile, a rate 6.6 times higher than the citywide average.** Nationally, metro areas' more valuable real estate increasingly lies in revitalized downtowns, and downtown Durham is no exception.[3]

Downtown investment from both the public and private sectors has grown significantly, totaled $1.4 billion between 2000 and 2018 —a remarkable figure considering the fact that investment nearly flat-lined between 2000 and 2002. The graph on the next page—taken from Downtown Durham Inc.'s 2018 *State of Downtown* presentation—shows a trend of significant private investment concurrent with or following significant public investment.[4]

Downtown Land Value

	Downtown	City
Assessed Value	$80M	$1.7B
Square Miles	0.76	111
Assessed Value per Square Mile	$106M	$16M

Employment

As of 2015, central Durham held 15% of the city's jobs, or about 21,000 positions. This figure represents the addition of 7,000 jobs, a staggering 50% increase from 2010. Between 2010 and 2015, in fact, half of all job growth citywide took place downtown, enabled by numerous new office space development projects.

The educational services sector saw the largest increase, adding 5,000 new positions. Downtown jobs cross multiple fields, with educational services making up the largest category at 31%, followed by public administration at 21%, and professional services at 10%. The large proportion of education services jobs can be attributed to the presence of Duke's administrative, research, and development offices in downtown. Furthermore, many city and county administrative offices and services are located downtown, accounting for the large proportion of public administration workers.

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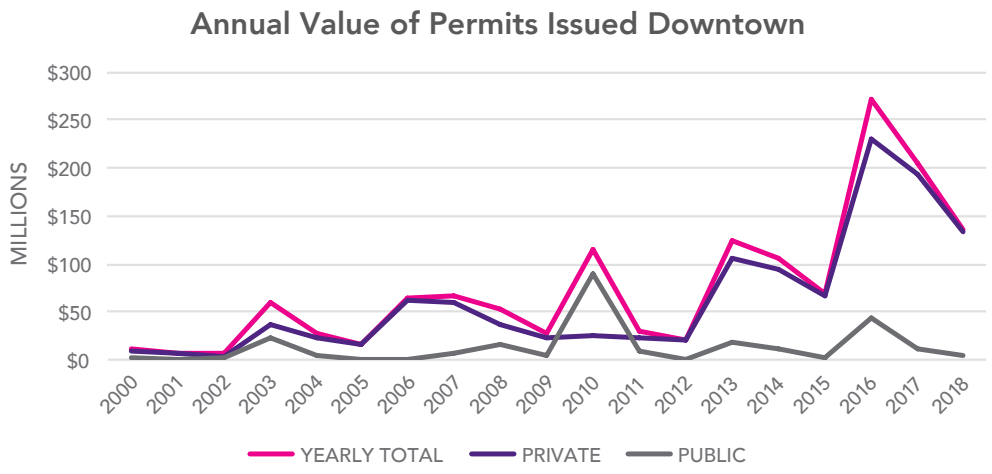
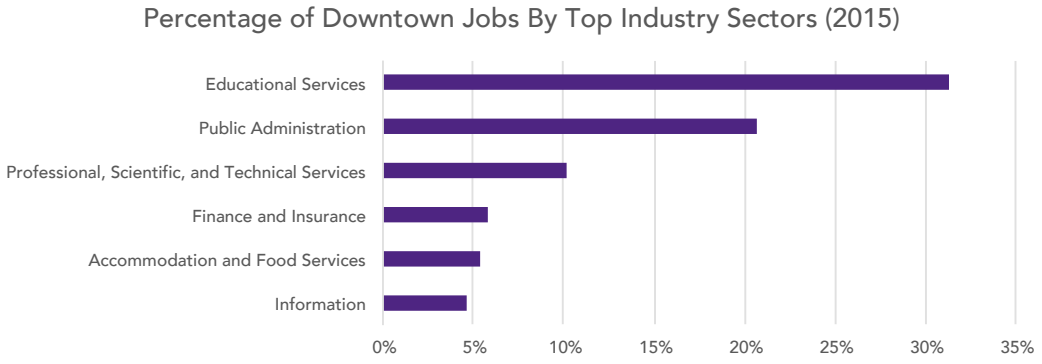


25% of central Durham's jobs—more than 5,000—qualify as knowledge industry positions. Knowledge jobs are a key figure for measuring economic health and growth, as they are fast-growing, well-paying, and bring in educated residents. Finance and insurance, along with professional services, have driven significant growth in the downtown economy. These two sectors account for 3,400 downtown jobs, up from 1,800 in 2010. The growing professional, scientific, and technical category speaks to the growth of downtown technology and biotech jobs. Although management jobs as a category showed a large percentage decrease, almost any numerical decline starting from such a small base (89 jobs in 2010 to 21 in 2015) would look dramatic.

Despite its strength in knowledge-economy jobs, central Durham accounts for a relatively low 8% of knowledge jobs citywide because large employment centers exist outside downtown. Health care and social assistance and educational services dominate the citywide economy; many positions in those sectors cluster at Duke University and its medical center, west of downtown. For instance, the health care sector accounts for 28% of total employment in the city, but downtown has only 2% of citywide health-care jobs. Offices located adjacent to Research Triangle Park, which is located just outside of the Durham city boundary, also account for knowledge job employment centers outside downtown.

Instead, central Durham's economy relies on other sectors. For example, it boasts a strong entrepreneurial community. The recently opened WeWork joins four other coworking hubs, further boosting Durham's appeal to small business owners and startups. In 2017 venture capital deals generated more than $30 million for startups based downtown.[5] Durham's proximity to the region's large research universities reinforces this innovative spirit. Conventional office inventory has grown rapidly as well, facilitating rapid job growth. More than 800,000 square feet of office space is currently in the downtown development pipeline.



Knowledge Industry Employment Growth 2010-2015

	Finance, Insurance, Real Estate and Rental and Leasing	Management of Companies and Enterprises	Professional, Scientific, and Technical Services	Information	Health Care and Social Assistance
Central Durham	91%	-76%	79%	37%	2%
City	23%	32%	-11%	11%	11%
Region	21%	20%	11%	12%	10%

Central Durham Employment

15%
CITY'S JOBS

8%
CITY'S KNOWLEDGE INDUSTRY JOBS

38%
CITY'S CREATIVE JOBS*

15%
30- TO 54-YEAR-OLD WORKERS

*Creative jobs are those that are classified by NAICS as "Arts, Entertainment, and Recreation" positions.

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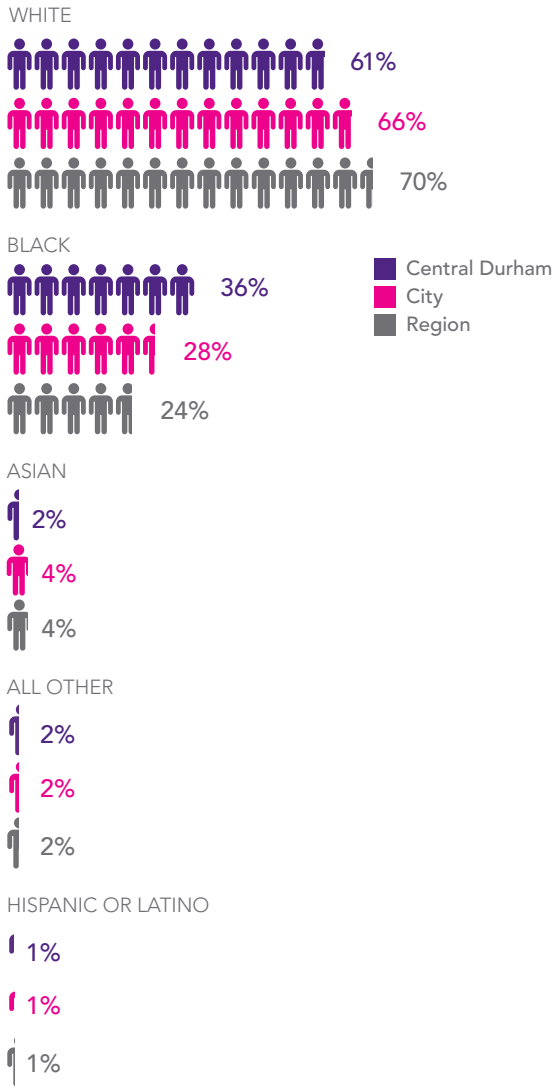
Inclusion | Diversity, Affordability

Downtowns and center cities invite and welcome residents and visitors by providing access to opportunity, essential services, culture, recreation, entertainment, and participation in civic activities.

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

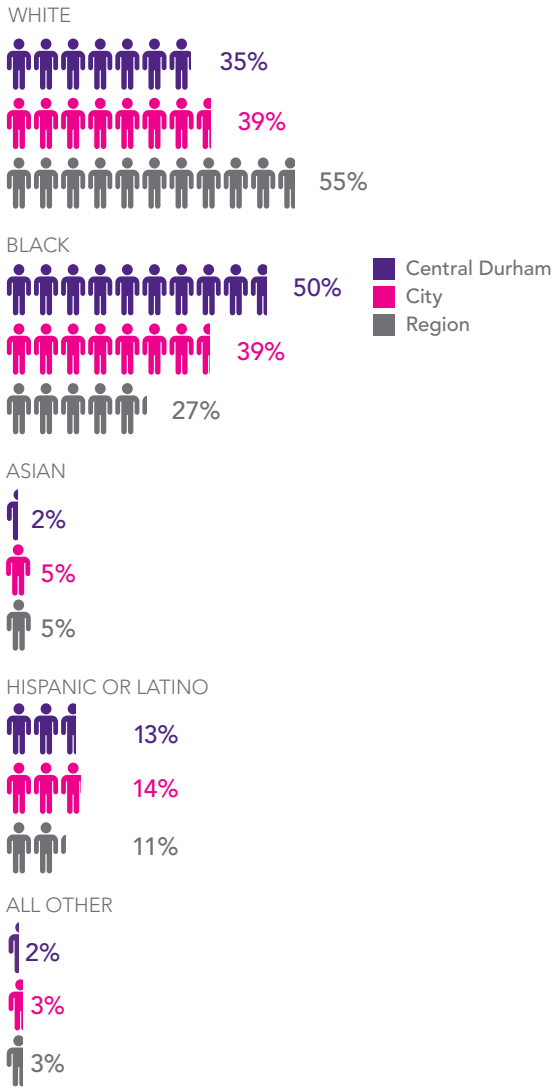
Inclusion "is one of the many common characteristics of vibrant and thriving downtowns across the nation…Great downtowns are inherently equitable because they enable a diverse range of users to access essential elements of urban life. These elements include, but are not limited to, high-quality jobs, 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."[6]

Employment By Race*



Numbers do not add to 100% because some people of Hispanic ethnicity identify as white, black, Asian, or other category.

Residents By Race*



Residential Population

Traditionally, residents with a broad range of education levels, work experience, ethnicities, ages, and incomes have called downtown home. Half of central Durham's population is black, 35% non-Hispanic white, and 13% Hispanic. Central Durham has a slightly higher proportion of non-white residents than the city and is more diverse than the region. Diversity helps define downtown's identity, and the authors of the Downtown Durham Master Plan note that the plan's diversity section "received the most passionate of all feedback" during the community engagement process.[7] We acknowledge that the study area is much larger than the downtown Durham business district, and central Durham's neighborhoods are somewhat racially concentrated including within the business district. Since 2010 the racial breakdown of the residential population has changed only slightly. Central Durham has grown 5% more white and 5% less "other" but has retained the same proportion of black, Asian, and Hispanic residents.

A diverse workforce is also important to a thriving downtown, as it means that residents from all backgrounds can participate in the economic opportunity there. In addition, a recent McKinsey study showed that companies across the country with greater racial and ethnic diversity are 35% more likely to have higher returns than their respective industry medians, suggesting the crucial role workforce diversity plays in corporate performance.[8]

* This study uses U.S. Census definitions of race. Race is defined as a person's self-identification with one or more racial groups (white, black, Asian, American Indian, Alaska native, Native Hawaiian or Pacific Islander, or some other race). Hispanic or Latino ethnicity is counted separately in the U.S. Census, and includes those who identify as one of the other races. Hence, the percentages on this chart don't add up to 100%.

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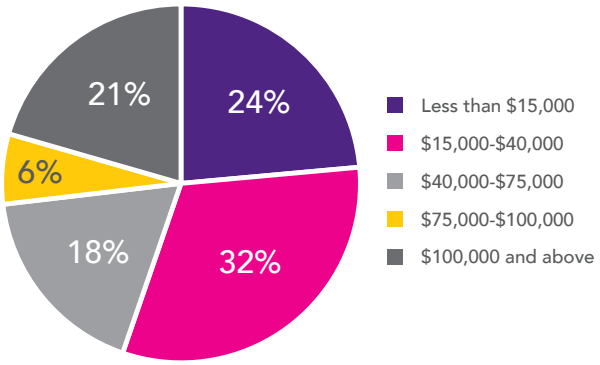
41% of central Durham residents hold a bachelor's degree or higher. That percentage ranks high among peer downtowns in this study, yet it's 8% below the level citywide. Recent trends point toward an even more educated residential population. Since 2010, the share of residents with bachelor's or advanced degrees increased 9%, and the share of residents with a high school diploma or less dropped 7%. Even with Durham's relatively low cost of living, workers without higher education can have a hard time finding family-sustaining jobs.

Highest Educational Attainment for Residents 25+

	2010	2016
HIGH SCHOOL OR LESS		
Central Durham	47%	40%
City	33%	29%
Region	35%	30%
SOME COLLEGE OR ASSOCIATE'S		
Central Durham	21%	19%
City	35%	23%
Region	23%	24%
BACHELOR'S DEGREES		
Central Durham	14%	19%
City	19%	26%
Region	23%	24%
ADVANCED DEGREES		
Central Durham	18%	22%
City	13%	23%
Region	20%	22%

Central Durham City Region

Central Durham Household Income



Household Income

	CENTRAL DURHAM	CITY	REGION
MEDIAN INCOME	$37K	$52K	$54K
MIDDLE-CLASS* RESIDENTS	10%	16%	15%

*Middle-class households are defined as those earning between $40,000 and $100,000 annually. This definition is based upon national averages, which may not align with local definitions.

Income

The Durham-Chapel Hill metro region's median household income stands at $54,842, below the U.S. median of $59,039. The citywide median is slightly lower at $52,115, but median household income in Central Durham drops to only $37,133. While the regional median reflects both the relatively lower cost of living in Durham-Chapel Hill as well as the presence of a large number of students, downtown's low median results at least in part from a higher percentage of residents with lower educational attainment. This contributes to a 32% poverty rate, nearly double the citywide rate. Central Durham has four public housing developments (Oldham Towers, Liberty Street, Forest Hill Heights, and the J.J. Henderson Housing Center), which represents a higher-than-average percentage of public housing for a central district.

Nevertheless, a rise in the number of residents with higher education has pushed income growth in central Durham. I n 2016 more households earned above $75,000 and fewer earned below $15,000 than in 2010.

Sixty-seven percent of central Durham households rent their homes. Two-thirds of rental units cost less than $1,000 per month, but rents have moved upward since 2010. The inventory of units that rent for less than $800 per month has shrunk while the number of units costing more than $800 has grown. Without active management, this trend may lead to displacement in the future as affordable housing stock is renovated or replaced to cater to wealthier tenants. Median home prices have tripled since 2000 in central Durham, and displacement is noticeable in historically low-income black communities in and near downtown.[9] City and county officials have put projects in motion to mitigate displacement downtown. Two developments are slated to add around 460 units of housing affordable to households earning 30 to 80 percent of the area median income.[10] Of the 2,000 new units announced or under construction, nearly 800 are slated for low-income residents.[11]

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Vibrancy | Spending, Fun

Due to their expansive base of users, center cities can support a variety of unique retail, infrastructural, and institutional uses that offer mutually reinforcing benefits to the region.

Downtowns and center cities typically form the regional epicenter of culture, innovation, community, and commerce. Downtowns flourish due to density, diversity, identity, and use. 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."[12]

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

With 9% of the city's retail, food, and beverage businesses, downtown Durham has a strong concentration of retail, but can still capture more demand from its 10,600 residents, 21,300 workers, and millions of annual visitors. The number of retail, food, and beverage businesses has risen steadily over the last decade and will continue to grow with downtown.

Strong entertainment offerings fuel downtown visitation. The Durham Performing Arts Center (DPAC) and Durham Bulls Athletic Park each pulls in roughly 500,000 visitors annually.[13,14] In addition, Durham hosts several renowned festivals, such as Art of Cool, Moogfest, Centerfest and multiple smaller festivals and events. The city has won accolades for its food, including recognition of local chefs by the James Beard Awards. In September 2018, PBS released the documentary *Food Town: Durham, N.C.*, a look at the lives of seven prominent Durham chefs.[15]

An extremely high proportion of downtown Durham's retail businesses are restaurants and bars, accounting for just under 90% of storefronts. This strength has been fueled by an increasing diversity of restaurant and bar options, with multiple upscale businesses having opened in recent years. Several bars with an emphasis on entertainment (for example, a bar and arcade), like Boxcar and Quarter Horse, have opened, as well as the Urban Axes, an axe-throwing facility. The limited number of non-food and beverage businesses downtown suggest some room to diversify retail options downtown for continued vibrancy.

All Retail

	Downtown	City	Region
TOTAL RETAIL BUSINESSES	171	1,885	3,567
NUMBER OF RETAIL BUSINESSES PER SQUARE MILE	225	17	2
NUMBER OF RESTAURANTS AND BARS	152	621	1,110

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Residential Growth

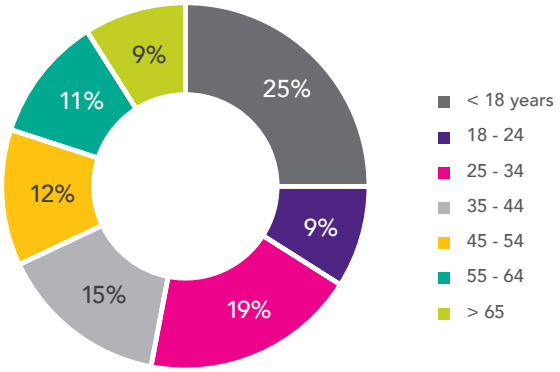
Central Durham saw its residential population increase by 26% between 2010 and 2016, reaching about 10,700. During this same period, the city grew by 14% and the region by 11%. The new developments mentioned in the "Inclusion" section essentially guarantee that population will continue to rise as new projects come online.

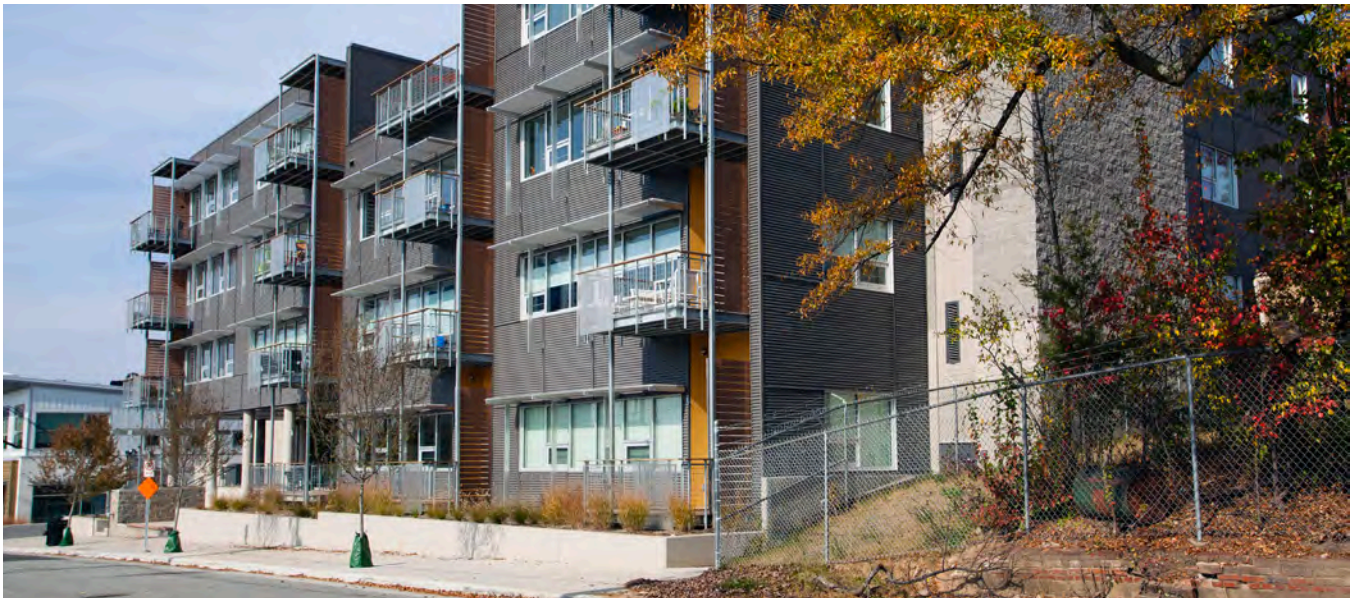
Children under 18 make up the largest group of residents in central Durham, which may be due in part to the large number of public housing complexes in Central Durham. Central Durham's age breakdown closely maps that of the city overall. Compared to other downtowns, the proportion of residents aged between 18 and 34 is low at 29%, but the number of residents in this age range increased 67% (about 800 residents) from 2010 to 2016. This demographic is most associated with young professionals and "millennials." The personal-finance website Growella ranked Durham the #1 place in the U.S. for millennials to move to in 2018. The rankings factored in data on entry-level job opportunities, commutes, cost of living and post-tax pay, and vibrancy (restaurants, bars, clubs).[16] Millennials are now the largest generation in the country's workforce, making them a key demographic to recruit.

Residential Growth (2010–2016)

RESIDENTIAL POPULATION GROWTH	Central Durham	City	Region
	26%	14%	11%

Downtown Age Breakdown





Identity | Visitation, Heritage, Tradition

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 anchor.

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."[17] The cultural offerings in downtown enhance its character, heritage, and beauty, and create a unique sense of place not easily replicable in other parts of the city.

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

Hashtags

52,035

PHOTOS POSTED ON INSTAGRAM WITH **#DOWNTOWNDURHAM**

6,000

PHOTOS POSTED ON INSTAGRAM WITH **#DIRTYDURHAM**

*Instagram downtown hashtag count as of January 2019.

Downtown has a strong sense of local identity closely tied to its independently owned businesses, history, and Southern character. The success of the Bull Durham and W. Duke & Sons tobacco companies initially spurred the city's growth. In time, manufacturing moved out of downtown and left behind large brick warehouses and industrial facilities that have become a cornerstone of Durham's aesthetic and style.

Divided into seven small districts with distinct identities, downtown abounds in one-of-a-kind offerings. For example, the American Tobacco District encompasses the city's biggest visitor attractions—the Durham Performing Arts Center, which hosts over 200 performances a year, and Durham Bulls Athletic Park. Old tobacco warehouses, renovated and reopened as Class A office and retail space, typify the Durham aesthetic of historic red brick. The district abuts the City Center District, home to most of downtown's hotels and its densest corridor of stores and restaurants.

Before revitalization began in the early 2000s, downtown had a reputation for being dirty and dangerous. Though the origins of the moniker remain ambiguous, at some point local residents began referring to Durham as "Dirty Durham" or "Dirty D." Downtown has become safer and cleaner in recent years, thanks in part to the efforts of Downtown Durham, Inc.'s ambassador team. And locals have turned the "Dirty Durham" label into a badge of honor, celebrating the city's rough-around-the-edges reputation. T-shirts and signs proudly display the motto "Keep it dirty, Durham," a celebration of (perceived) imperfection similar to the "keep Austin weird" mantra. The website DirtyDurham.com describes itself as a

> "website & blog dedicated to reclaiming the gritty image of Durham for those that are proud of its rough edges, because that 'roughness,' after all, has created a unique and diverse culture where creativity and a sense of community can thrive. So, as we see other parts of the Triangle becoming more commercialized and uniform, we hope the Bull City always stays a little different, a little funky...a little 'dirty'."[18]

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Downtown Destinations

1
LIBRARY

2
MUSEUMS

2
STADIUMS

3
PARKS

5
HOTELS

17
PUBLIC ART INSTALLATIONS

Resilience | Sustainability, Diversity

At its broadest, resilience means a place's ability to withstand shocks and stresses. Thanks to their diversity and density of resources and services, center cities and their residents can better absorb economic, social, and environmental shocks and stresses than other parts of the city.

Diversity and economic vitality equip downtowns and center cities to adapt to economic and social shocks better than more homogenous communities. Similarly, density better positions downtowns and center cities to make investments needed to hedge against and bounce back from increasingly frequent environmental shocks and stresses.

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

Economic Resilience

Durham's history stands as a testament to the importance of economic resilience. The loss of the tobacco, textile, and furniture manufacturing industries was a heavy blow to the city. Today, as the Economy section notes, downtown hosts businesses operating in a range of economic sectors. Broadening the range of sectors represented improves downtown's ability to adapt to negative economic shocks like a financial crash or the decline of a specific industry. 41% of central Durham residents hold a bachelor's degree or higher, above average in comparison to peer cities. The presence of educated workers strengthens downtown's economic resilience of downtown and encourages businesses that rely on a highly educated workforce to grow or move to Durham.

Social Resilience

Diversity, density, and access to public gathering places and to community supports all help make downtowns and center cities more socially resilient. The walkable character often

Downtown Community Resources

1 LIBRARY

1 COMMUNITY CENTER

5 RELIGIOUS INSTITUTIONS

3 PARKS

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Social Resilience

RESIDENTS IN POVERTY

32%	18%	16%
CENTRAL DURHAM	CITY	REGION

found in these areas also favors resilience: research has shown that walkable urban places typically have more diversity, a greater share of low-income people, and less racial segregation than drivable suburban areas.[19] Other research by the George Washington University Center for Real Estate and Urban Analysis has found a positive relationship among walkable urbanism, economic performance, and social equity, but the researchers caution that these findings don't eliminate the need to develop policies and mechanisms to assure affordability.

As the dense core of Durham, downtown offers a highly walkable urban landscape but has a limited number of community resources, with one library, one community center, five religious institutions, and only three parks. Downtown Durham maximizes these spaces, however, by hosting a considerable number of community activities and events. These resources create critical opportunities for residents, employees, students, visitors, and others to meet, learn, and participate in civic life. As stewards of downtown, urban place managers work to make neighborhoods more livable and "create communities that welcome people of all walks of life, offer the services necessary for residents, and create integrated and holistic communities."[20] Access to parks, outdoor activities, and open spaces enhances quality of life by providing opportunities for downtown residents to pursue healthier lifestyles.

As central Durham attracts new investment, the City and Durham's place management organization should work to ensure that revitalization benefits all residents. About one-third of central Durham renter households are rent-burdened, meaning they pay more than 30% of income for housing. Access to community resources also plays a key role in building social resilience for low-income residents. 3,400 central Durham residents lived in poverty in 2016, and the study area's 32% poverty rate remains nearly twice the citywide rate of 18%.

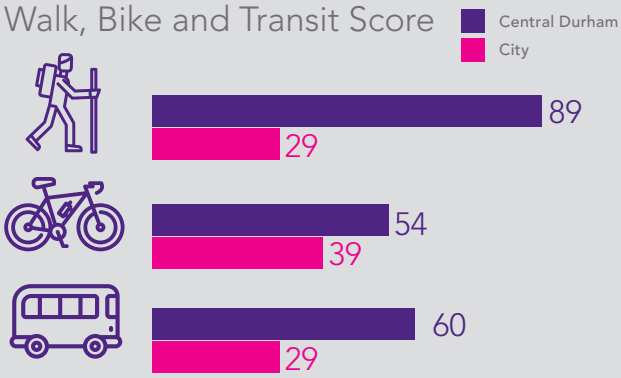
Environmental Resilience

In 2018, Durham won $1.1 million in grants from Bloomberg Philanthropies' U.S. Mayors' Challenge to test innovative ways to adjust commuting behavior.[21] New inititiatives will aim to reduce car dependence and relieve the strain on existing parking infrastructure. In addition, downtown will soon see better infrastructure for its non-vehicular transportation. The Durham Bike + Walk Implementation Plan assigns priority to areas of the city for new infrastructure based on community needs. The plan identifies corridors in and around downtown with the highest priority for bike and sidewalk improvements.[22]

Increasing transit options enables commuters to rely less on single-occupancy driving. This not only improves air and water quality but also boosts social resilience, since it adds new ways for residents and employees to reach their destinations. 58% of central Durham residents drive alone to work, a lower rate than the 75% who commute alone across the city and region. Even so, only 6% of central Durham residents walk to work, and another 13% take transit, pointing to a noticeable dependence on cars. More can be done to improve the accessibility of downtown to the city and region. Downtown scores significantly higher than the rest of the city on Walk, Transit, and Bike Scores, yet commuting counts don't yet reflect a shift away from personal vehicles.

Downtown Commuting Patterns

	Central Durham	City	Region
BIKE	2%	1%	1%
TRANSIT	13%	5%	4%
CAR POOL	13%	11%	10%
WALK	6%	3%	3%
DRIVE ALONE	58%	75%	74%



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Downtown Profile | Summary

Durham's "emerging" downtown has ridden a significant wave of revitalization and economic growth. Rapid population and employment growth along with significant increases in private investment since 2000 have reshaped downtown. As downtown continues to grow and offer more opportunities to all residents, retaining the city's unique identity will require increasing vigilance. Local businesses, foodie culture, and grit undergird Durham's attractiveness, and building on these qualities will ensure that downtown remains a vibrant destination for more residents, employees, and visitors.

Using 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 sorted 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.

Central Durham falls into the "emerging" tier. These tables show how downtown Durham compares to downtowns in the same tier and to the citywide average for tier cities. For the full set of cities by tier and accompanying data points, please refer to the *Value of U.S. Downtowns and Center Cities* compendium.*

Emerging Downtowns

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

On average, these downtowns cover 1.7% of citywide land area and have an assessed value of $1.5 billion or 3% of citywide assessed value. Compared to the tier, Durham accounts for:

	CENTRAL DURHAM	EMERGING DOWNTOWNS
MILLENNIALS LIVING CITYWIDE	29%	41%
CITYWIDE POPULATION	4%	3%

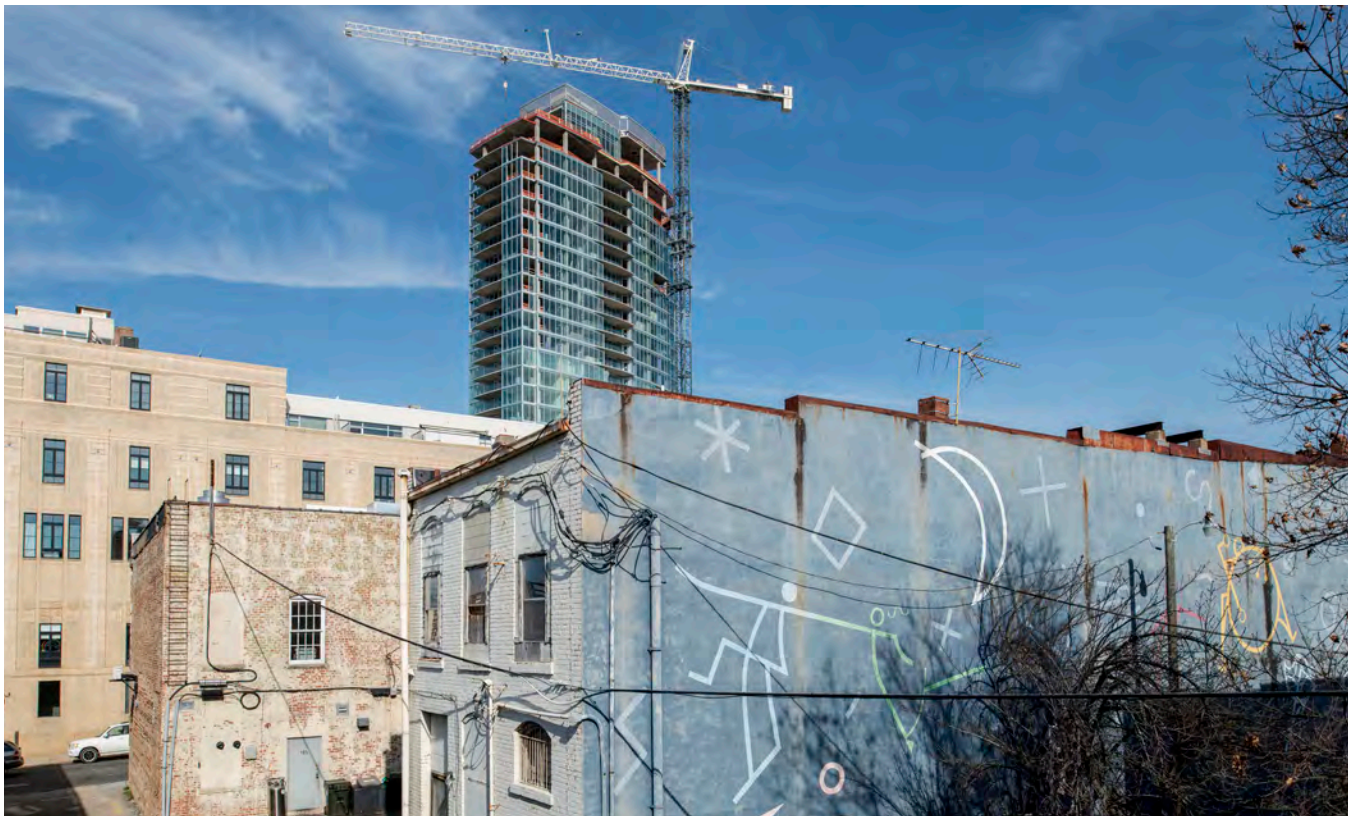
RESIDENTIAL

	CENTRAL DURHAM	EMERGING DOWNTOWNS	EMERGING CITY
GROWTH AVG. 2010 – 2016	26%	14%	6%
DENSITY RESIDENTS / ACRE	5.7	6	3.9

EMPLOYMENT

	CENTRAL DURHAM	EMERGING DOWNTOWNS
GROWTH 2010-2015	50%	8%
CITYWIDE JOBS	15%	17%
CITYWIDE KNOWLEDGE JOBS	7%	15%
CITYWIDE CREATIVE JOBS	38%	23%
RESIDENTS HOLDING A BACHELOR'S DEGREE OR HIGHER	41%	33%

* The compendium report is available at the IDA website, downtown.org



	CENTRAL DURHAM	EMERGING DOWNTOWNS	EMERGING CITY
WALK SCORE	89	82	37
BIKE SCORE	54	79	47
TRANSIT SCORE	60	64	31

	CENTRAL DURHAM	EMERGING DOWNTOWNS
HOTELS	5	18
HOTEL ROOMS	716	3,399
CITYWIDE HOTEL ROOMS	N/A	21%

NON-SINGLE-OCCUPANCY VEHICLE COMMUTE

CENTRAL DURHAM	EMERGING DOWNTOWNS	EMERGING CITY
34%	35%	15%

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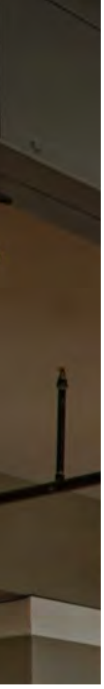
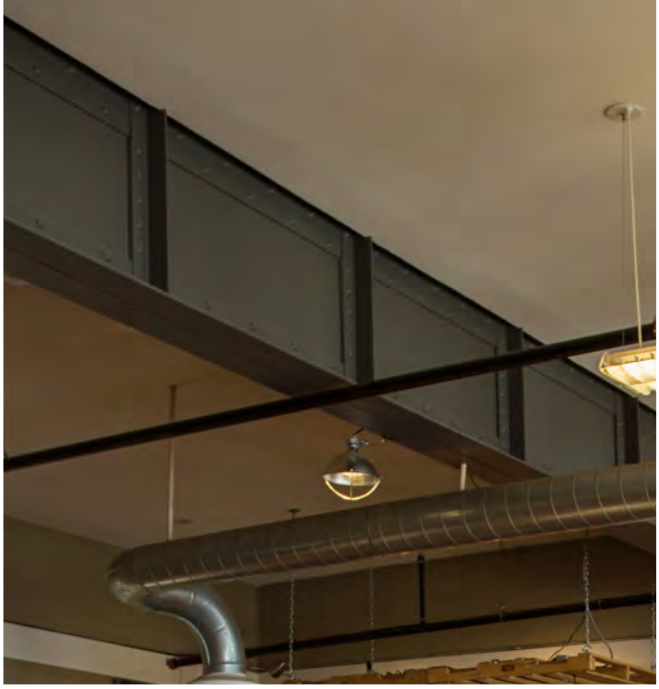

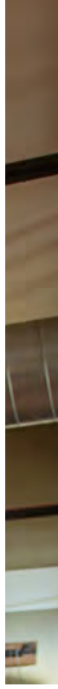

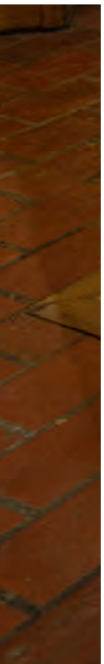

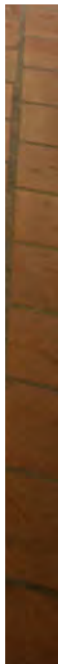

APPENDICES

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PROJECT METHODOLOGY

PRINCIPLES AND BENEFITS

DATA SOURCES

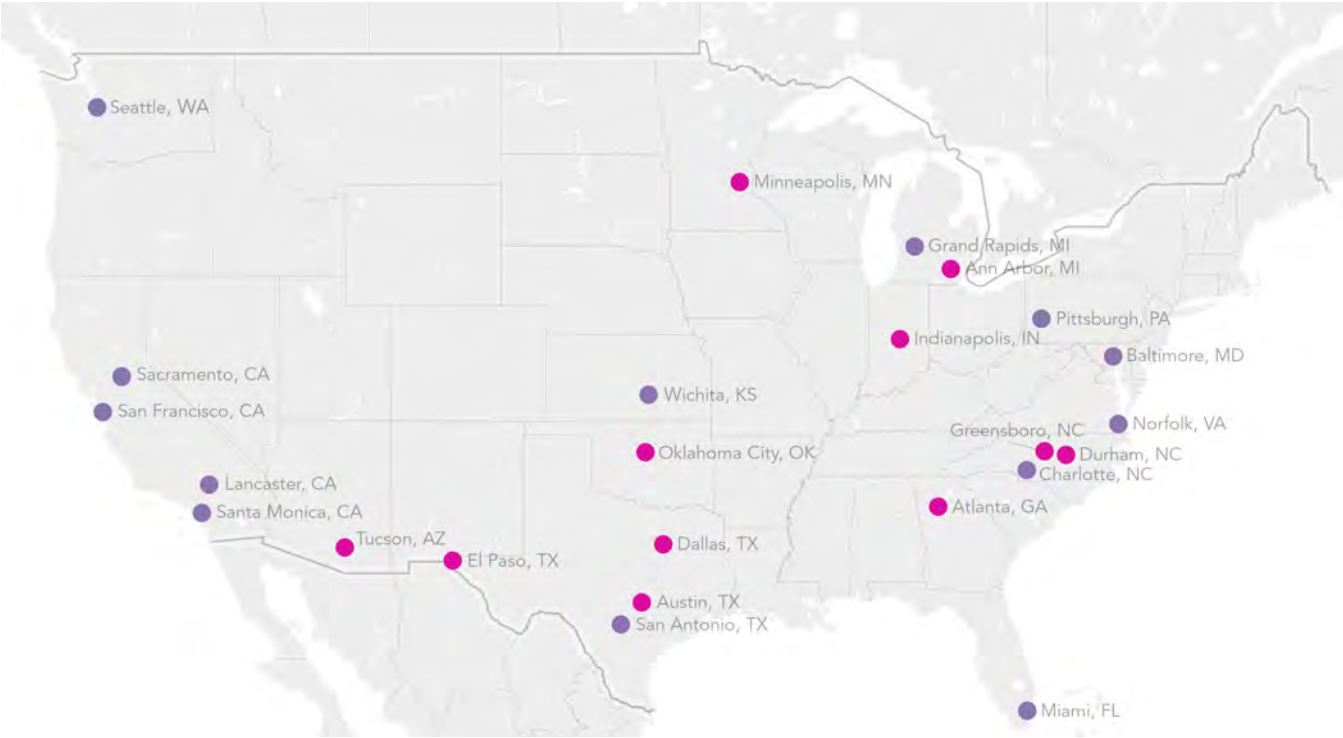
ADDITIONAL IDA SOURCES

BIBLIOGRAPHY

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?

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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.

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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.

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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.

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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	• American FactFinder • ESRI	• LEHD on the Map	• Costar, Market Reports, Brokers	Varies	Varies
Other Sources	• Social Explorer • PolicyMap	• EMSI	• Xceligent	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.

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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.

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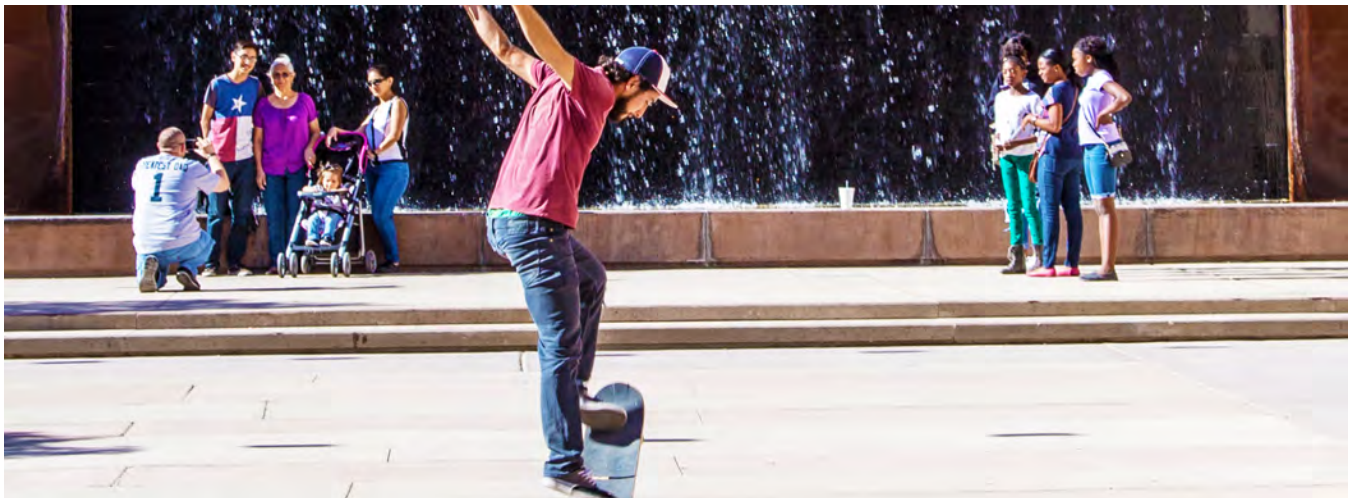

Enter value for downtown, city, and region	Computed automatically	Selected and refined by downtowns
INPUTS	**OUTPUTS**	**ARGUMENTS**
• Total land area • Number of jobs	• Jobs per mi² downtown vs. city (dividing jobs by total land area) • Growth in jobs over time (comparing 2010 to the current year) • Percentage of city jobs (dividing downtown jobs by city jobs)	"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

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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
	AFFORDIBILITY	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

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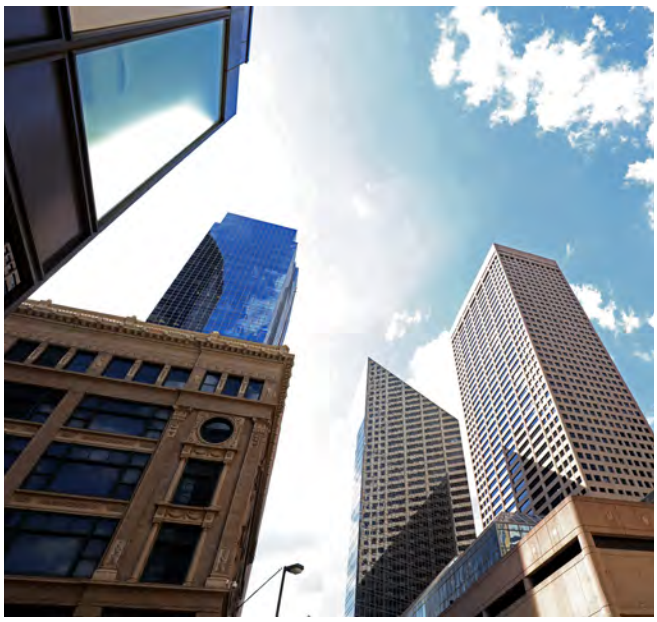
Appendix II: Principles And Benefits

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

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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.

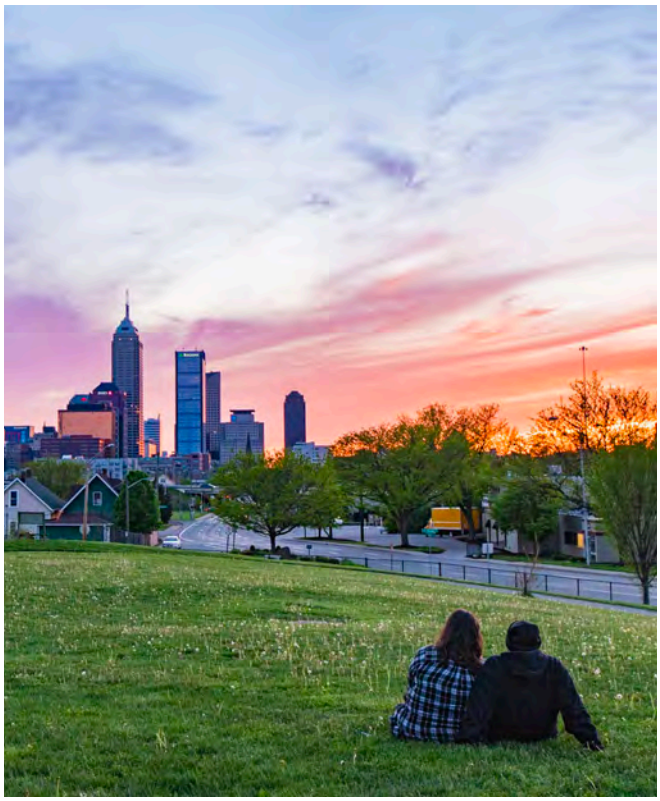
Many unique regional cultural institutions, businesses, centers of innovation, public spaces, and activities are located downtown. The variety and diversity of offerings respond to the regional market and reflect the density of downtown development. As downtowns and center cities grow, their density—of 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."[1]

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."*[2]

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)

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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."[3] 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.[4] 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.[5]

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

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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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