



The Value of U.S. Downtowns and Center Cities

CALCULATING THE VALUE OF DOWNTOWN CLEVELAND, OHIO
A 2019 IDA STUDY

A 2019 PUBLICATION CREATED BY
THE INTERNATIONAL DOWNTOWN ASSOCIATION



INSPIRED LEADERS
SHAPING CITIES

ABOUT IDA



IDA

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

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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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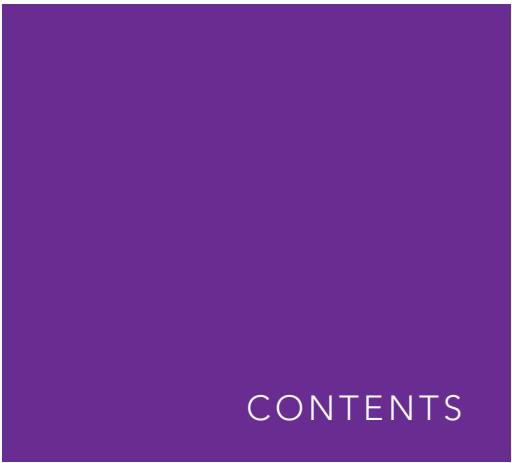
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SECTION ONE
PROJECT
OVERVIEW



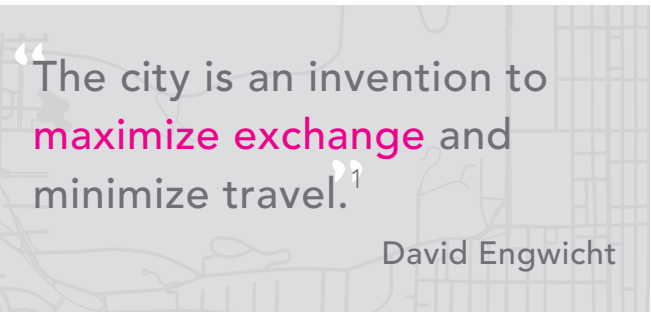
Introduction

GREAT CITIES 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, community and identity. Taking David Engwicht's point a step farther, no place in the city maximizes exchange and minimizes travel the way downtowns and center cities do. 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, socialization, 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. In short, the very proximity and density that downtowns and center cities champion make them strong environments for the city at large to thrive.

Though geographically small, the impact of a strong downtown or center city is felt far beyond its boundaries. Downtowns contain a disproportionately large share of the city and region's most important resources. These range from economic assets such as jobs, tax revenue, private investment, and property value to cultural and recreational resources like restaurants, historical places, theatres, museums, public art and festivals. Vibrant and vital downtowns drive growth in and around their districts. A thriving downtown increases nearby value, driving growth in adjacent neighborhoods and beyond.

Leveraging IDA's unique industry-wide perspective and expertise, this study quantifies the value of U.S. downtowns and center cities across five core value principles and over 150 metrics, with a focus on how downtown contributes to the city and region around it. *The Value of U.S. Downtowns and Center Cities* study is a partnership between IDA and a local urban place management organization (UPMO). UPMOs have invaluable insights into their managed areas and the relationships to unlock essential data sources for this study.



Urban Place Management Organizations

IDA members are UPMOs who manage growing districts to help create vital, healthy, thriving cities for everyone — from residents to tourists to business owners. These UPMOs are downtown champions who bring urban centers to life.

Since 1970, property and business owners in cities throughout North America have realized that revitalizing and sustaining vibrant downtowns, city centers and neighborhood districts requires special attention beyond the services city administrations can provide alone. These private-sector actors come together, with funding from property and business owners, to form nonprofit management associations that deliver key services and activities within their districts. UPMOs are often called business improvement districts (BIDs), business improvement areas (BIAs), partnerships and alliances.



About the Value of Downtowns Study

The study aims to emphasize the importance of downtown, to demonstrate its unique return on investment, to inform future decision making, and to increase support for downtown from local decision makers. The project has two primary goals:



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

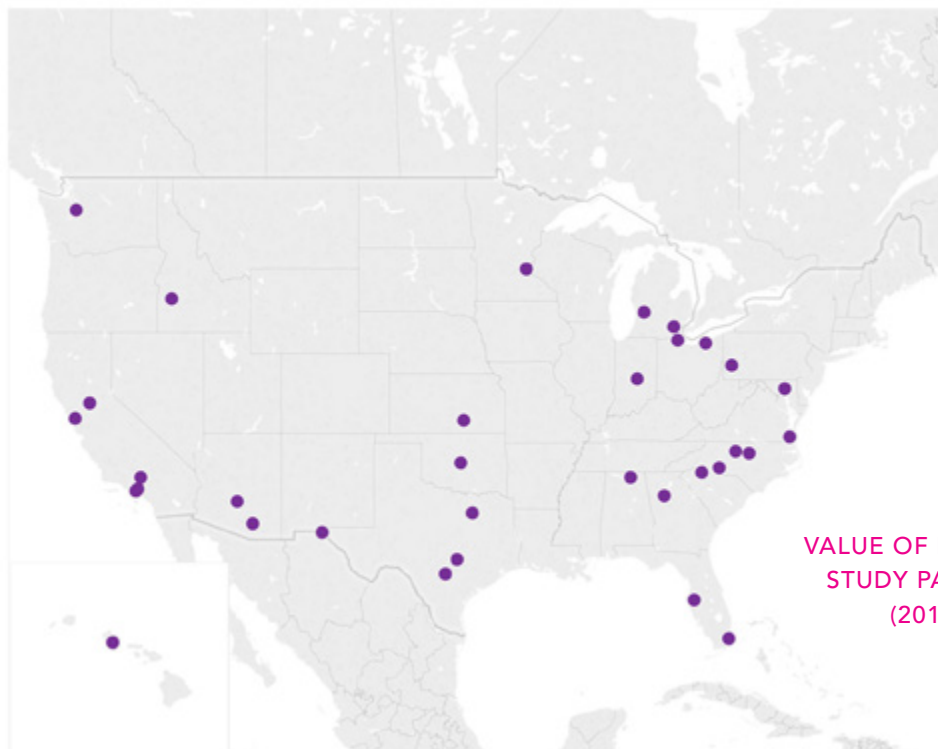


Expand the **range of arguments** UPMOs can make to their stakeholders using publicly available data.

IDA began this research in 2017, working in collaboration with Stantec's Urban Places and an initial cohort of 13 UPMOs to develop a methodology for compiling and evaluating data from their downtowns. In 2019, our analysis adds 9 new locations to bring the total to 33 downtowns and center cities across the U.S.

The analysis focuses on how downtown provides value in the five principles of economy, inclusion, vibrancy, identity,

and resilience. IDA and our UPMO partners work together to collect over 250 individual metrics across four benchmark years (most current year available, 2015, 2010, and 2000), and across three geographic levels (study area, city, and MSA/county). In total, more than 3,000 individual pieces of data are collected for each participating downtown. Our downtown database currently contains around 100,000 data points.



ECONOMY



Downtowns and center cities deliver great value due to their roles as economic anchors for their regions. As traditional centers of commerce, transportation, education, and government, downtowns and center cities frequently serve as hubs of industry and revenue generators—despite their making up only a small fraction of the land area. Downtowns support high percentages of jobs across many different industries and skill levels. Thanks to relatively high density of economic activity in the center city, investment provides a greater return per dollar for both public and private sectors.

INCLUSION



As the literal and figurative heart of the city, downtowns welcome residents, employees, and visitors from all walks of life. Residents of strong downtowns vary widely in age and often come from a wide range of racial, socioeconomic, cultural, and educational backgrounds. This diversity ensures that as an inclusive place, downtown has a broad appeal to all users and a strong social fabric. Downtowns provide access to opportunity, essential services, culture, recreation, entertainment and civic activities for everyone.

VIBRANCY



The ability of vibrant places to attract new residents, and a regionwide consumer base creates value. Vibrancy is the buzz of activity and excitement that comes with high-quality experiential offerings like breweries, restaurants, theatres, or outdoor events. Many unique regional cultural institutions, businesses, centers of innovation, public spaces and activities are located downtown. As the cultural center of a city, downtown typically attracts a large share of citywide visitors and accounts for a large share of citywide hotels and hotel rooms.

IDENTITY



Downtowns and center cities often serve as iconic symbols of their cities, and this strong sense of place enhances local pride. The distinctive cultural offerings in downtown enhance its character, heritage, and beauty, and create an environment that other parts of the city can't replicate. 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.

RESILIENCE



As key centers of economy and culture, downtowns play a key role in ensuring stability, sustainability, and prosperity; they can power citywide and regional efforts to bounce back from economic or environmental shocks. Thanks to the diversity and density of their 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 successful downtowns and center cities equip them to adapt to economic and social shocks better than more homogenous areas. 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.

Methodology Overviewⁱ

The study began by identifying the best boundaries for defining a downtown district. Geographic parameters often vary across data sources and may not align with a UPMO's jurisdiction. This study defined the commercial downtown even when that meant moving beyond the boundaries of local development authority or business improvement district. 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."² IDA worked with each UPMO to determine the boundaries of its downtown for this project, focusing on alignment with census tracts for ease of incorporating data from the U.S. Census.

To measure the value of downtowns relative to their cities, the analysis relied heavily on data that could be collected efficiently and uniformly for each downtown, its city, and its region. IDA collected data from multiple national databases such as the U.S. Census, Longitudinal Employer-Household Dynamics program (LEHD), and ESRI. In addition, we asked our UPMO partners to collect local data through local channels like county assessors or commercial real estate brokers. We then analyzed the data to identify individual downtown trends, benchmark performance against the city and region, and compare the downtown against other downtowns in the study.

We used meaningful qualitative observations to acknowledge unique features or add nuance and context to trends revealed in the data. As an example, universities often sit just outside the downtown study area. We can assume that the student body, even if technically outside the study area, forms a major consumer market for downtown and describe in our analysis how students influence the study area.

The analytical focus of the report is to make data-supported value statements about downtown by comparing it to the city, identifying its growth trends, and illustrating its density. For instance, the data allowed us to conclude this about downtown Seattle's 2017 employment totals:

Downtown is a strong employment and industry hub for the city, with a concentration of high-paying and high-growth employment sectors. 43% of all citywide jobs are located downtown and 58% of citywide knowledge jobs. Overall, employment increased 14% since 2010, outpacing both the city and region. In addition, the number of knowledge jobs grew 28% during the same period. Per square mile there are 85,924 workers on average, more than ten times the average job density citywide.



ⁱ Refer to the appendix for the full methodology.

Known Limits to this Study

While this study seeks to quantify the value of downtowns, we have several limitations to our approach. Data collection from local sources was inconsistent. Some of the supplemental data we asked our local partners to collect was not always available, making comparisons based on these metrics impossible. At times, the data we asked for simply did not exist or hadn't been collected at the relatively small scale of census tracts or downtown neighborhoods. This made it challenging to rely on local data for analysis and often resulted in some missing pieces in our narrative.

The sample size of 33 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. Our most recent

data also comes predominantly from the 2017 American Community Surveys (ACS), the 2017 LEHD On the Map tool, and ESRI Business Analyst. Due to a lag in data availability, some metrics may not align with more recent data from local downtown, municipal, or proprietary sources.

Citywide context plays a large role in the analysis. Because the size of cities varies significantly (e.g., from 20 square miles in Spartanburg to 606 square miles in Oklahoma City), comparisons of the percentage of citywide jobs and residents between districts can be skewed. However, since each downtown operates within the context of its city, understanding the comparative proportion of jobs and residents, along with other metrics, provides an important tool for assessing a downtown's contribution to its city and region.



Improvements and Areas for Future Research

This year, IDA implemented a new data-collection system that allows us not only to expand the database for new study participants, but also to make regular updates in the publicly available data from downtowns analyzed in previous years. This means that we benchmarked this year's cohort of data to the updated data from previous years, rather than comparing older data. We have begun to develop a plan for updating the local data from earlier cohorts (e.g., tax information, visitor counts, etc.) to coincide with the results of the 2020 census.

In addition to all the data collected in previous years, we have continued to add new metrics from untapped data sources. Most notably, we collected new data from Zillow, the Center for Neighborhood Technology, the Centers for Disease Control and Prevention, National Register of Historic Places, and Geolounge.

Analysis this year also included maps of population change and job concentration in downtown versus the city. We plan to develop additional forms of spatial analysis in future updates.



SECTION TWO
DOWNTOWN
PROFILE

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 an entire region's economic productivity, inclusion, vibrancy, identity, and resilience.

Study Area

DOWNTOWN PARTNER

Downtown Cleveland Alliance

CITY

Cleveland, OH



Downtown Cleveland has been an anchor of growth, for both population and jobs in a city and region still adapting to a post-industrial economy. Strong population growth has increased the vibrancy of downtown helped preserve historic districts, encouraged construction of popular sports arenas, and supported nationally recognized attractions like the Rock and Roll Hall of Fame and the Great Lakes Science Center. At 2.24 square miles, downtown Cleveland occupies only 2.9% of the city's land area but delivers outsized benefits.



Residential Population

	Downtown	City	Region
Population	14,413	388,812	2,062,764
Downtown Share		3.7%	0.7%
Per Sq. Mile	6,434	5,004	1,032
Residential Growth 2010-2017	23.3%	-2.0%	-0.7%

Source: U.S. Decennial Census (2010); American Community Survey 5-Year Estimates (2013 – 2017)


Downtown Cleveland is home to more than 14,000 residents today, more than double its population in 2000, and representing a 23% increase between 2010 and 2017. Downtown proved an anchor of growth during a period of sharp decline in the rest of the city and region.

For the purposes of this study, we used the most recent American Community Survey population estimate of 14,413 residents in 2017. This number establishes a base for other demographic characteristics, and this analysis uses the 2017 ACS figures for all downtowns to enable consistent comparisons. To supplement this estimate, Downtown Cleveland Alliance (DCA) has conducted a quarterly survey of apartment occupancy since January 2011. This survey encompasses a larger area that includes all of the Cleveland's Campus District and reflects all new development. Based on its most recent survey, DCA estimates the current downtown population is between 18,500 and 19,000.

Downtown functions as an economic engine for the city, with more than one-third of all jobs concentrated in this small area. Employment grew 5.6% between 2010 and 2017, but private-sector job growth in downtown, at 13.8%, outstripped private jobs growth citywide and regionally. The largest employers include the City and County governments, the U.S. General Services Administration, KeyBank, and Sherwin-Williams.

As with residential population, DCA tracks annual employment growth in a larger geography that includes all of the Campus District, based on lease transactions and major job-related investments (e.g., hotel construction and resulting employment). At the end of 2018, DCA estimated that Flats, the Downtown Cleveland Improvement District, and Campus District contained an estimated 105,000 jobs in aggregate.

Downtown Cleveland is thriving and growing. Its office inventory accounts for 47% of the region's office space, but real estate growth has been strongest in housing and hotels.







Employment Population

	Downtown	City	Region
Jobs	97,357	279,778	1,029,708
Downtown Share		34%	9%
Per Sq. Mile	43,463	3,601	515
Total Jobs Growth 2010-2017	5.6%	4.7%	7.5%
Private Jobs Growth 2010-2017	13.8%	9.5%	10%

Source: LEHD On the Map – All Jobs and All Private Jobs (2017). The total jobs number assumes that the number of public administration jobs in downtown, city and region has remained the same between 2015 and 2017 to account for the lack of federal jobs data in 2017 LEHD data.

Inventory

	Downtown	Share	Per Square Mile	Growth 2010–2018
 OFFICE (SF)	16M	47% of region	7.1M	0.5%
 RETAIL (SF)	1.6M	28% of city	715K	n/a
 RESIDENTIAL (UNITS)	14,301	6% of city	6.3K	33%
 HOTEL (ROOMS)	4,853	26% of region	2.1K	22%

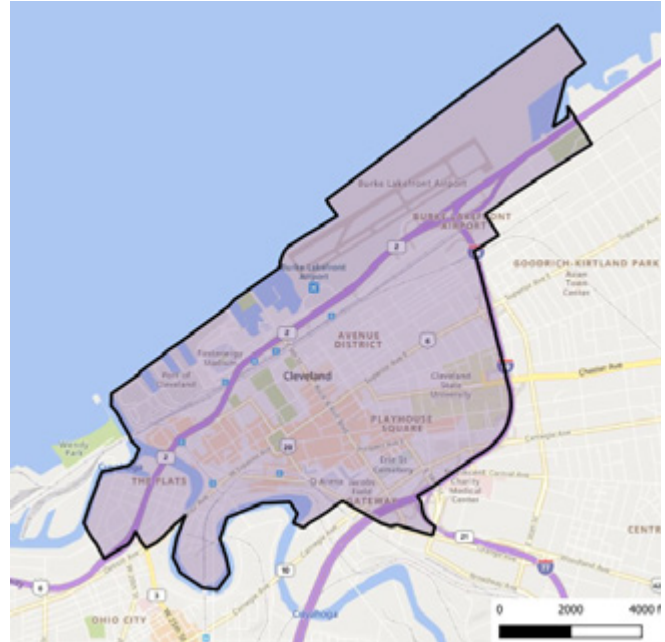
Source: CBRE, Center for Research Populations Dynamics Levin College, Cleveland CVB (2018)

Defining Boundaries

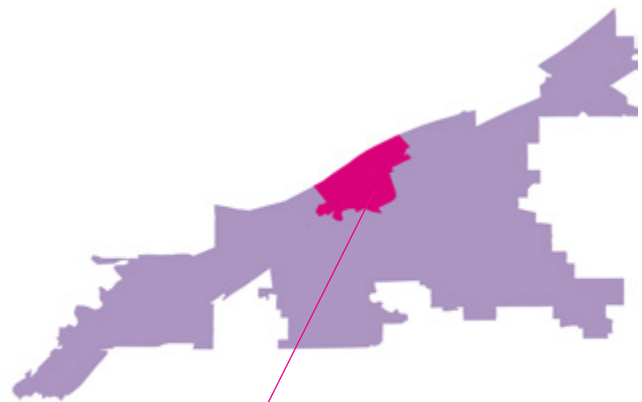
The study area extends beyond the boundaries of the business improvement district, as geographic parameters vary across data sources and don't typically align with a place management organization's jurisdiction. IDA recommended that the urban place management organizations participating in this study 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 downtown as the area bounded by Lake Erie on the north, the Old River and Cuyahoga River on the west, and Interstate 90 on the south and east. This includes census tracts 1033, 1071.01, 1077.01, and 1078.02. This study area includes Burke Lakefront Airport, for a total land area of 3.23 square miles. However, we removed the airport from the land area used to calculate population density because no residents live on this land. Density figures reflect a land area of 2.24 square miles. The city is defined as the City of Cleveland, and the region is the Cleveland-Elyria Metropolitan Statistical Area. Because data sources varied, some data for the region refers to Cuyahoga County; the case study indicates when that is the case.

IDA and DCA wanted to build a deeper understanding of downtown's contribution to citywide and metro-area performance across a range of areas. We grouped these areas under five principles—economy, inclusion, vibrancy, identity, and resilience—developed in 2017 in workshops with the first cohort of urban place management organizations assembled for this kind of analysis. We evaluated data for multiple factors within each principle, focusing on trends and growth over time and how downtown compared to the city and region.



Downtown Cleveland Study Area



Downtown Share
of City Land Area **2.9%**

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 useful guide for development policy.

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

Jobs/Industries

Downtown Cleveland serves as the historic, cultural and governmental heart of the city and the traditional central business district. In 2017, it contained an estimated 90,800 primary jobs¹, accounting for 34% of jobs in the city. The two biggest sectors are professional, scientific, and technical services and public administration. Limitations on data meant that the jobs figure likely undercounts downtown jobs for two reasons. First, it assumes no change in public administration jobs in downtown, the city and the region between 2015 and 2017 to account for the lack of federal jobs numbers in 2017 LEHD data. The 2017 LEHD data did not provide job counts for federal agencies downtown and at the courthouse. Second, the LEHD data did not include partner or sole proprietorships, which make up a significant part of the downtown employment base. Nevertheless, as the map shows, the downtown area is the clear job center of the city, followed by Midtown and University Circle, which contain another 23% of jobs in the city.

Downtown Employment



34%

CITY'S JOBS



33%

CITY'S KNOWLEDGE
INDUSTRY JOBS



79%

CITY'S CREATIVE
JOBS



35%

30-TO-54-YEAR-OLD
WORKERS

Source: LEHD On the Map – Primary Jobs (2017)

The number of primary jobs downtown grew 4.3% between 2010 and 2017. This figure stands in stark contrast to the 20,000 jobs lost—a 19% decline—in the post-9/11 recession and Great Recession. Downtown has since emerged as a renewed jobs center. Private jobs downtown have rebounded even more strongly; after falling 36% between 2000 and 2010, they rose by 13% between 2010 and 2017.

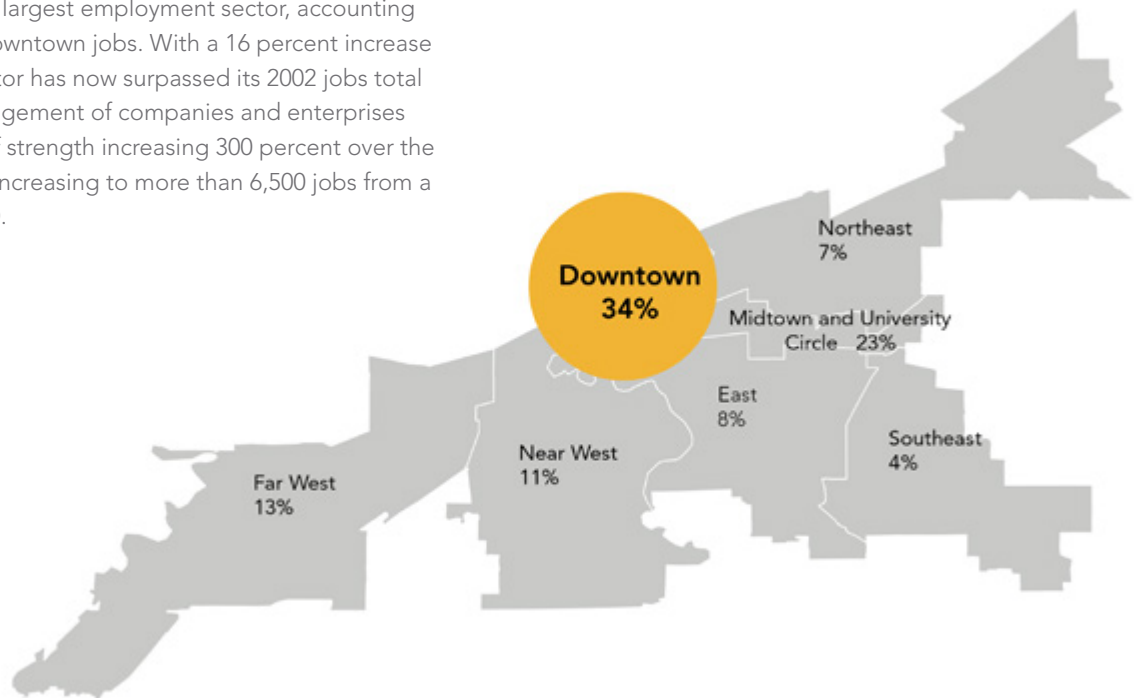
In addition, the office market has strengthened following investment in adaptive reuse to remove older, vacant office space from the market and convert it to housing, introducing new residential options downtown. The Downtown Cleveland Alliance also has pursued an active business development strategy that provides a single point of contact and focuses on retaining existing office tenants and attracting new enterprises from the region. In the past five years, DCA has documented more than 30 businesses that have moved downtown, bringing more than 3,400 jobs and absorbing 680,000 square feet of office space.

Nearly half of downtown jobs are in the knowledge industry, although these industries are still recovering from losses in the city since 2002. Professional, scientific, and technical services remain the largest employment sector, accounting for 20 percent of downtown jobs. With a 16 percent increase since 2010, this sector has now surpassed its 2002 jobs total in downtown. Management of companies and enterprises was another area of strength increasing 300 percent over the same time period, increasing to more than 6,500 jobs from a low of 1,600 in 2010.



Downtown Cleveland assessed value is **\$1.29B**, more than **25%** of the city's total assessed value

Assessed Value Per Square Mile **Downtown \$577M**



Jobs in Cleveland by Planning Area

Source: LEHD On the Map – Primary Jobs (2017)

Knowledge Industry Employment Change 2010-2017

Finance, Insurance,
Real Estate and
Rental and Leasing



Management of
Companies
and Enterprises



Professional,
Scientific, and
Technical Services



Information



Health Care and
Social Assistance



Downtown	-15%	301%	16%	-22%	-20%
City	2%	77%	13%	-26%	7%
Region	12%	58%	10%	-14%	3%

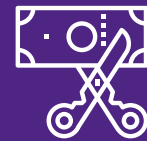
Source: LEHD On the Map (2010 and 2017)

Fiscal Impact

Land in downtown Cleveland has a cumulative assessed value of \$1.29 billion, accounting for nearly one-fourth of citywide assessed value. Assessed value downtown has increased 23% since 2010, while citywide assessed value dropped slightly by 2%. On average, downtown land value reaches \$577 million per square mile, a rate eight and a half times higher than the comparable figure for the whole city.

Downtown generates more than 25% of the city's property tax revenues, and in 2017 attracted \$274 million in private investment, almost half of all private investment in Cleveland. High levels of private investment have helped limit the need for public investment downtown to 7% of the city's spending. That has freed much of the public revenue generated for use elsewhere in the city.

Investment and Tax 2017



	Downtown	Share of City
PROPERTY TAX	\$8.3M	25%
PUBLIC INVESTMENT	\$45.5M	7%
PRIVATE INVESTMENT	\$274M	44%

Source: City of Cleveland CAFR (property tax); Greater Cleveland Partnership (public and private investment) (2017)

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.

Residential Diversity

Cleveland is a multicultural city. About half of downtown residents are white, 40% black and 5% Hispanic or Latino. Citywide, those figures flip: about 50% of residents are black, 35% white, and 11% Hispanic or Latino. Downtown has a higher proportion of Asian residents at 7% than the city or the region.

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

“Inclusive spaces in the public realm, particularly in our cities’ downtowns, can help break down the social barriers that often divide us. Thriving downtown districts and public spaces promote not only economic prosperity, but also social cohesion.”³

Residents By Race*

WHITE



BLACK



ASIAN



ALL OTHER



HISPANIC OR LATINO



Source: American Community Survey 5-Year Estimates (2013 – 2017)

Employment By Race*

WHITE ALONE



BLACK ALONE



ASIAN ALONE



ALL OTHER



HISPANIC OR LATINO



Source: LEHD On the Map (2017)

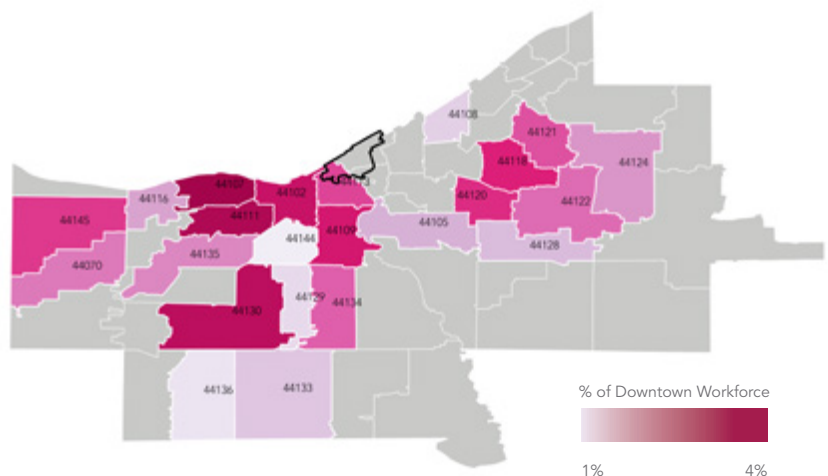
Downtown scores relatively high on the diversity index, with a score of 64. The index reflects the mix of residents within an areaby measuring the likelihood that any two random people within the district would each be of a different race or ethnicity. The index, however, doesn't necessarily indicate how evenly mixed residents are within the study area. The city as a whole actually scores higher on the index, 68, than downtown, although downtown is much more diverse than the region, which only scores 50.

In addition, Cleveland is welcoming to an international population. Downtown, 14% of residents are foreign-born. A recent analysis by Boundless Immigration, a firm that helps immigrants apply for green cards and citizenship, ranked metro Cleveland the #1 area in the US for becoming a citizen.² Global Cleveland, headquartered downtown, hosts an annual Welcoming Week with events designed to highlight the social and economic benefits of newcomers to Cleveland and the US.

Workforce Racial Diversity

The workforce in downtown shows the same level of diversity as the citywide workforce and surpasses the number for the region. The racial mix of the downtown workforce, however, differs strikingly from that of the residential population, implying that downtown residents don't necessarily benefit from the concentration of jobs in downtown. In fact, only about 20% of downtown workers live in any part of the city; downtown draws most of its workforce from across the region.

Top 25 ZIP codes in Cuyahoga County Commuting to Downtown Cleveland



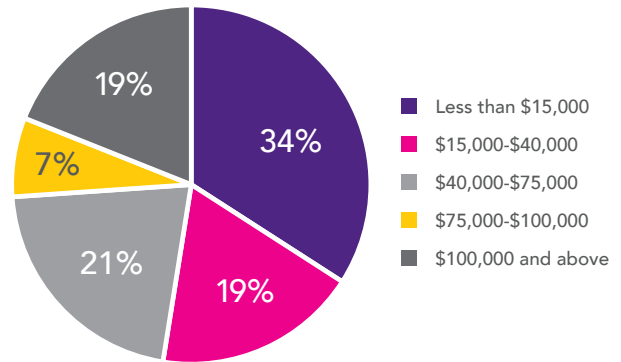
Source: LEHD On the Map (2017)

Socioeconomic Diversity

The downtown study area is home to households that span the socio-economic spectrum. About one-third of households earn less than \$15,000, and about 26% earn above \$75,000. These averages, however, mask sharp disparities within downtown. The median income for the study area is \$40,000, well above the citywide median of \$28,000. Yet, incomes vary strikingly by location. In the downtown core, median household income stands at roughly \$79,000. East of downtown, the figure falls to \$11,000. The presence here of Cleveland State University and several large income-restricted housing complexes, dramatically reduces median income. This part of downtown contains the state’s largest homeless shelter, the Lutheran Metropolitan Ministry’s shelter at 2100 Lakeside.


The median monthly rent in the downtown core stands at \$1,360; a broader mix of housing in the rest of downtown means that approximately half of units rent for \$1,000 or less. Taken together, both housing and transportation costs—closely related and typically the two highest expenses for a household—require only 37% of household income for downtown residents, slightly below the citywide rate of 39% and much lower than the regional income burden of 53%.

Downtown Household Income



Source: American Community Survey 5-Year Estimates (2013 – 2017)





Household Income

	DOWNTOWN	CITY	REGION
MEDIAN INCOME	\$40K	\$28K	\$52K
MIDDLE-CLASS* RESIDENTS	32%	34%	43%
HOUSING AND TRANSPORTATION INDEX	37%	39%	53%

*Middle-class households are defined as earning between 67% and 200% of the area median income (AMI). The AMI for the Cleveland MSA is \$52,446.

Source: American Community Survey 5-Year Estimates (2013 – 2017); CNT Housing & Transportation Index (2019)

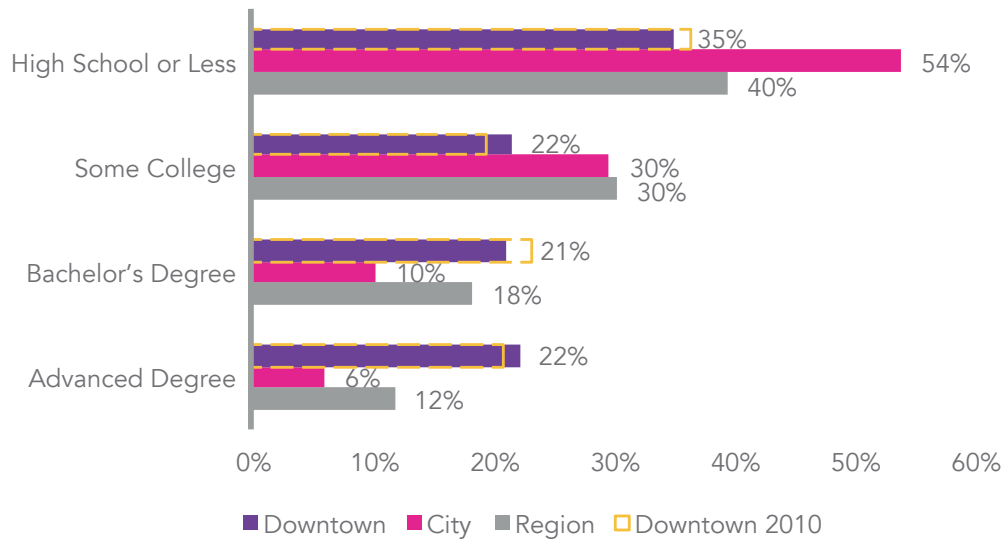
Educational Attainment

Since 2010, about 45% of downtown Cleveland’s residents have held a bachelor’s degree or higher. A slightly higher proportion now hold advanced degrees than in 2010. Downtown residents are much more highly educated than residents citywide.

Age

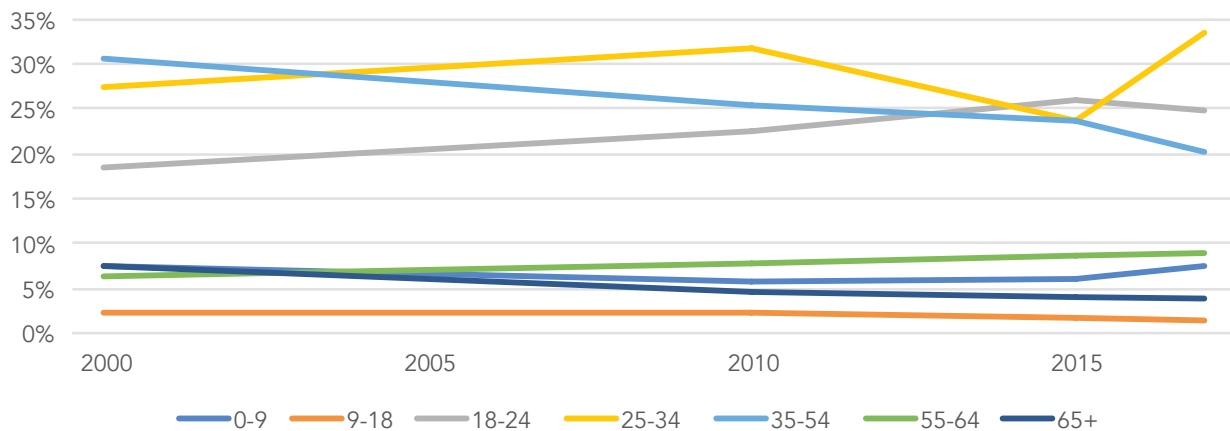
Almost 60% of downtown Cleveland residents are between the ages of 18 and 34. Within that group, 25- to 34-year-olds account for 34% of downtown’s population. Downtown has seen an increase in its young adult population, but it has also experienced a small uptick in children under the age of nine and in residents between the ages of 55 and 64.

Educational Attainment in Cleveland (2017)



Source: American Community Survey 5-Year Estimates (2013 – 2017)

Change in Age Diversity Over Time



Source: American Community Survey 5-Year Estimates (2013 – 2017)

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 cross-cutting 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.”⁴

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

Residential Growth

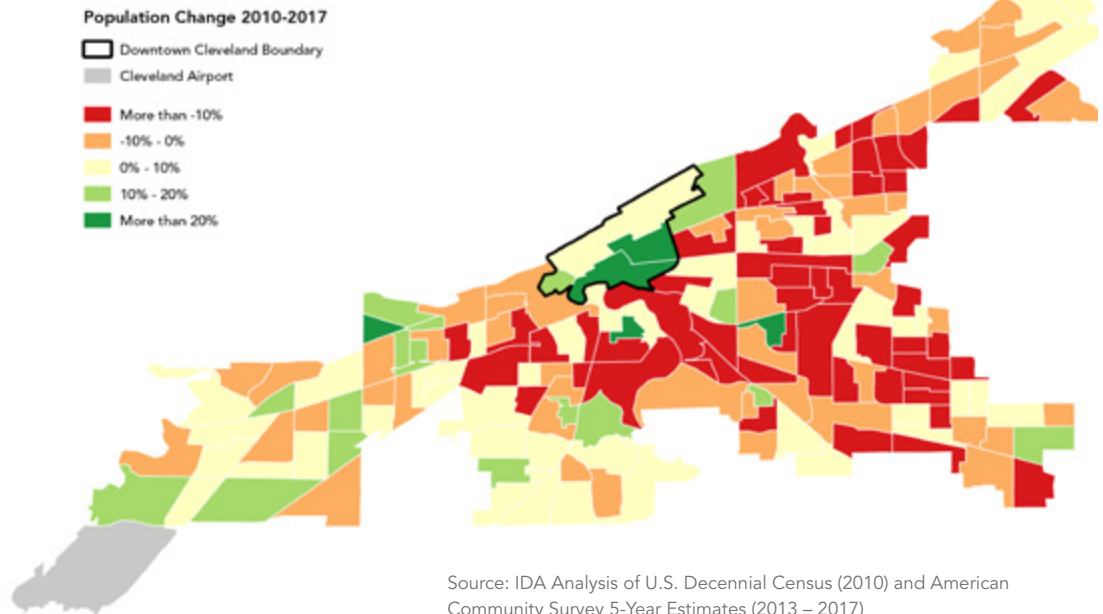
Residential growth signals a fast-changing and vibrant downtown, and a growing population is especially evident in downtown Cleveland, which has boomed even as citywide and regional population has declined. Downtown has doubled in population since 2000, reaching more than 14,000 residents today. Since 2010, the population has

Residential Change (2010 - 2017)




RESIDENTIAL POPULATION CHANGE	Downtown	City	Region
	23%	-2%	-0.7%
RESIDENTIAL INVENTORY CHANGE	Downtown	City	Region
	33%	-1%	-2%

Source: U.S. Decennial Census (2010), American Community Survey 5-Year Estimates (2013 – 2017); CBRE (2018)



Source: IDA Analysis of U.S. Decennial Census (2010) and American Community Survey 5-Year Estimates (2013 – 2017)

Retail Sales



Annual Downtown Spending	Share of City
\$484 Million	13%

SALES REVENUE PER SQUARE MILE	Downtown
	\$216M

Source: ESRI Business Analyst (2017)

increased by 23%, while the citywide population dropped 2%, and regional population declined slightly by 0.7%. This increase ties closely to the 33% increase in residential units downtown since 2010, compared to slight declines across both the city and region. As of September 2019, more than 1,500 apartments were under construction along downtown's Euclid Avenue. Downtown inventory will likely grow over the next decade. At the recommendation of an IDA Advisory Panel on housing in downtown, DCA completed a Housing Demand Study in 2018 that revealed demand for an additional 3,800 housing units between 2023 and 2030.

Retail Vitality

Downtown accounts for roughly 13% of all retail sales in Cleveland and hosts 16% of all retail businesses in Cleveland. These relatively strong figures show that downtown captures a higher percentage of citywide sales and hosts a higher portion of businesses than peer downtowns in this study.

Downtown has 473 businesses, including more than 260 restaurants and bars that comprise more than 28% of the city's retail space. At more than 715,000 square feet of retail per square mile, downtown has nearly 10 times the retail density of the city as a whole. Due to the strength of the retail market downtown, retail space commands a higher average rent, \$16.60 per sq ft, than the citywide average rate of \$13.10.

All Retail

TOTAL RETAIL BUSINESSES

	Downtown	City	Region
	473	2,908	14,780

RETAIL INVENTORY (SF) PER SQUARE MILE

	Downtown	City	Region
	716K	73K	39K

NUMBER OF RESTAURANTS AND BARS

	Downtown	City	Region
	263	1,064	4,571

NUMBER OF DESTINATION RETAIL BUSINESSES

	Downtown	City	Region
	70	230	1,757

Source: ESRI Business Analyst (2017), CBRE (2018)

Retail Market Vitality



SQUARE FEET OF RETAIL	Downtown	City	Region
	1.6M	5.7M	77M
RETAIL VACANCY RATE	Downtown	City	Region
	11%	11%	12%
RETAIL RENT (SF) TRIPLE NET	Downtown	City	Region
	\$16.6	\$13.1	\$12.7

Source: CBRE (2018)

Live Events and Entertainment

Downtown has many attractions that bring out residents and visitors alike: a wealth of theatres, five additional venues with live entertainment, and three professional-level stadiums that attract national attention for sports and other events. In addition, 12 annual festivals/parades with more than 1,000 attendees bring visitors downtown. The largest are the Cuyahoga Community College (Tri-C) Jazz Festival, WinterFest, Great Lakes Tall Ships Festival, and Pride in the CLE. In addition, downtown hosts a steady flow of national events, including Cleveland Clinic's Annual Medical-Innovation Summit, the Rock & Roll Hall of Fame Induction Ceremony (biannually), the 2014 Gay Games, 2016 Republican National Convention and 2019 MLB All-Star Game. It will also host the 2020 NCAA Men's Basketball Sweet Sixteen, 2021 NFL Draft, 2022 NBA All-Star Game and 2024 NCAA Women's Basketball Final Four.



Downtown Events



5

EVENT VENUES
WITH LIVE
ENTERTAINMENT

3

PROFESSIONAL-
LEVEL STADIUMS

19

THEATRES

1

FARMER'S MARKET

12

TOTAL ANNUAL
FESTIVALS/PARADES
1K+ ATTENDEES

249

TOTAL
CONVENTIONS

175,648

ANNUAL CONVENTION
ATTENDEES

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.”⁵ The authentic cultural offerings in downtown enhance its character, heritage, and beauty and create a unique sense of place not easily replicated in other parts of the city.

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

Downtown Cleveland is the heart of the city and cultural hub. It has high-profile attractions like the Rock and Roll Hall of Fame and stadiums for the Cleveland Indians, Cavaliers, and Browns. The heart lies in and around Euclid Avenue, with the newly restored Public Square as the public commons, Playhouse Square, and the commercial center at East Ninth and Euclid. Downtown has undergone a renaissance, especially striking in a time of decline in the surrounding city and region; it aspires to be a true downtown for everyone.

Downtown has a high number of the city’s historic structures and public art installations, as well as 12 museums, one-third of the total number in the city. It also offers ample opportunities to gather and attend events in 17 parks and 7 plazas. Public Square, which reopened in 2016 following a \$50 million makeover funded by a public-private partnership, anchors the downtown and connects the Erie lakefront to the mall, originally designed by Daniel Burnham. The Square serves as public commons for demonstrations, protests, speeches, and celebrations.

Nearby, Playhouse Square houses the second largest performing arts center in the U.S. and has the largest number of Broadway subscribers in the country. Playhouse Square is one of only a handful of locations nationally that host Broadway Series performances for a three-week run. It is also home to the Tony Award-winning Cleveland Play House, and the Cleveland State University Arts Campus. Downtown Cleveland’s emerging film industry—building on the successful filming of *The Avengers* and *Captain America: Winter Soldier*—is also based in Playhouse Square, site of Ohio’s first film school, the Cleveland State University School of Film & Media Art. The 2020 state budget introduced an expansion of the \$40 million Ohio Motion Picture Tax Credit to include theater productions, promising a strong future for Playhouse Square.

Social Media



68,578 PHOTOS POSTED ON
INSTAGRAM WITH
#DOWNTOWNCLEVELAND
AND
#CLEVELANDDOWNTOWN

83,800 FOLLOWERS ON TWITTER
@DOWNTOWNCLE

18,938 FOLLOWERS ON FACEBOOK
**DOWNTOWN CLEVELAND
ALLIANCE**

* Source: Instagram, Twitter, and Facebook counts as of May 30, 2019

Downtown Destinations

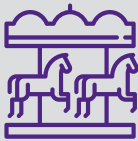


56

HISTORIC
STRUCTURES

12

MUSEUMS



7

PLAZAS / SQUARES



17

PARKS



19

HOTELS



100

PUBLIC ART INSTALLATIONS



3

STADIUMS



2

LIBRARIES

Source: National Historic Register, CRS, Tom Yablonsky, Downtown Cleveland Alliance, City of Cleveland Public Art Coordinator (2018)

The historic fabric of downtown, centered around Euclid Avenue as downtown's historic Main Street, retains the identity of historic Cleveland. There are nine historic districts downtown, one-fourth of the city's total number of districts. The Euclid Avenue Historic District is the latest evolution of the avenue, from storied Millionaire's Row to a commercial corridor of department stores. In the late 1990s, the Downtown Cleveland Alliance and other partners worked with property owners to designate the area as a historic district, benefitting from both the federal and state tax credits. Property owners coupled historic tax credits with the City's tax abatement program to renew dated department stores and office space while retaining the area's historic character. In addition, adaptive reuse throughout downtown has allowed for conversion of commercial buildings into residential space, which adds vibrancy and new housing options.

The number of attractions and strong sense of identity translate to a high number of visitors. More than 6 million visitors come to downtown Cleveland annually, about one-third of the region's total tourism. Downtown has more than one-quarter of the region's hotel rooms and has experienced a strong increase in occupancy since 2010, rising from 57% to 67.5% today.



Hotels

	DOWNTOWN	REGION
HOTELS	19	129
HOTEL ROOMS	4,853	18,458
AVG OCCUPANCY	67.5%	64.8%
VISITORS	6M	18.5M

Source: Destination Cleveland (2018)

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

As described in the Economy section, the 2002 recession hit downtown hard, but it has seen steady economic growth since 2010. A variety of sectors call downtown home, such as professional, scientific, and technical services and public administration, and continuing to encourage a mix of sectors will strengthen downtown's ability to weather adverse economic events. The jump in the number of downtown residents who hold a bachelor's degree or higher also means that residents have more options for adapting to changing economic conditions.

Social Resilience

Downtowns act as hubs for social resilience. Their dense nature means that a diverse mix of residents and employees have access to a multitude of community resources in a small area. With 17 parks and natural areas, two libraries, a recreation center, and five religious institutions, residents, employees, and visitors can meet, learn, and participate in civic life in multiple places. Downtown is also home to Cleveland State University and Cuyahoga Community College.

Access to these resources plays a critical role in social resilience, particularly for low-income residents. About 5,300 residents—37% of downtown's population—live in poverty. Even as downtown has undergone a visible overall renaissance, a large segment of its residents still struggle. About one-third of renter households are also rent-burdened, which means they pay more than 30% of their income towards housing. Home to some of the largest housing shelters for men and women, the city center also contains several public housing developments that support low-income residents.

Downtown Community Resources



2

LIBRARIES



1

COMMUNITY
CENTER

5

RELIGIOUS
INSTITUTIONS

17

PARKS



2

POSTSECONDARY
INSTITUTIONS

5

PRIMARY AND
SECONDARY
SCHOOLS

Source: Downtown Cleveland Alliance, City of Cleveland Parks Department (2018)

Typically, downtowns with good access to resources have higher life expectancy than the city overall and a lower percentage of residents who don't exercise. In Cleveland, life expectancy and physical activity among downtown residents differs minimally from the rates for the overall city or the region.

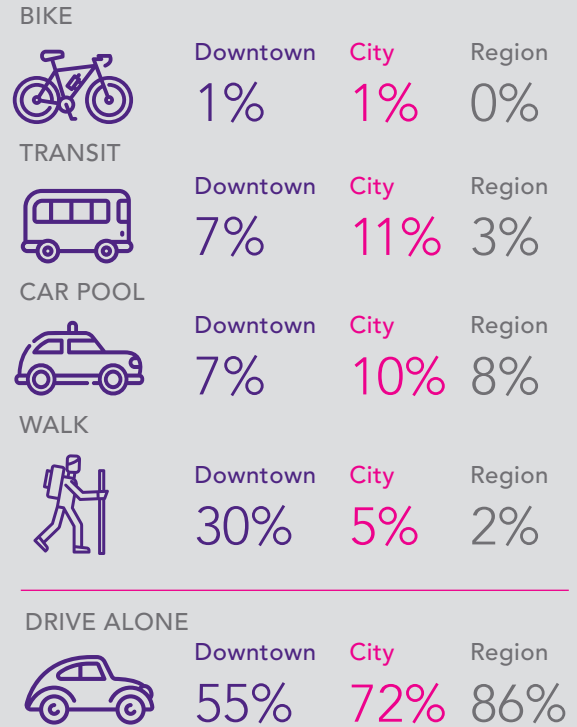
Environmental Resilience

Due to their density and proximity to jobs, services, and amenities, downtowns don't only drive economic growth and social resilience, but also boost environmental resilience. Per capita, downtowns generate fewer greenhouse gas emissions and offer multiple mobility options. With its location along Lake Erie and the Cuyahoga River, downtown benefits from waterfront amenities and is highly conscious of environmental initiatives that have an impact on water quality. A recent groundbreaking launched the final stages of the Ohio & Erie Canal Towpath Trail, a 100-mile recreational trail along the Cuyahoga River that will connect the Cuyahoga Valley National Park and downtown.

Estimated annual greenhouse gas emissions per downtown household are 4.4 tons, 30% below the city average of 5.7 tons. One major reason for this difference is the availability and ease of walking, biking and transit as primary methods of transportation to basic services and workplaces. Thirty percent of downtown residents walk to work (six times the citywide rate and 15 times the regional rate), while another seven percent commute by transit, and one percent by bike. These mobility options, combined with the rich diversity of places to walk to contribute to downtown's Walk Score of 91, well above the citywide average of 60. Dockless, shared mobility arrived in downtown in August 2019 as four e-scooter vendors and one dockless bicycle operator received permits to operate. By the end of a month-long rollout, downtown offered 2,000 e-scooters and e-bikes to support existing transit options like the free trolleys and expand mobility throughout the city.

Under the Greater Cleveland Regional Transit Authority's (RTA) Strategic Plan, the RTA launched a systemwide redesign in 2019 to improve transit service in the region, especially for those who go downtown. Initial survey results showed that passengers favored increasing service frequency, given limited resources. This could help improve ridership, particularly to downtown, which has a high density of residents and employees. To further improve downtown accessibility, the Downtown Cleveland Alliance has begun creation of a downtown mobility plan.

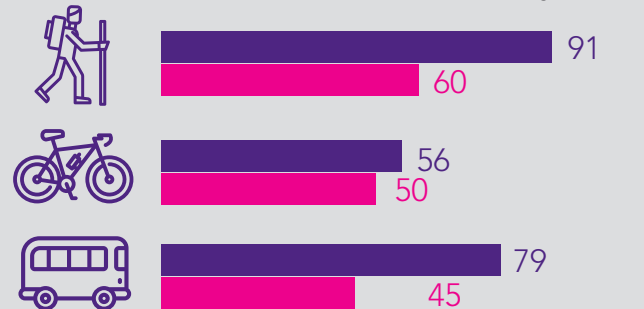
Downtown Commuting Patterns*



*Percentages may not add up to 100% due to rounding and exclusion of taxicabs.

Source: American Community Survey 5 Year Estimates (2013 – 2017)

Walk, Bike and Transit Scores



Source: Walk Score (2019)



Environmental Resilience



	DOWNTOWN	CITY
ACRES OF OPEN SPACE	98	1,864
% OF LAND FOR OPEN SPACE	7%	4%
ANNUAL GHG EMISSIONS PER HOUSEHOLD	4.4	5.7
BIKE SHARE STATIONS	16	n/a
TOTAL TRANSIT STOPS, INCLUDING RAIL AND BUS	241	n/a

Source: City of Cleveland Parks & Recreation (2018), CNT Housing & Transportation Index (2018)

Social Resilience



SHARE OF CITY

36%	37%
RENT-BURDENED RESIDENTS	RESIDENTS IN POVERTY
77	37%
AVERAGE LIFE EXPECTANCY	NO LEISURE-TIME PHYSICAL ACTIVITY

Source: American Community Survey 5 Year Estimates (2013 – 2017), Downtown Cleveland Alliance, CDC (2017)

Water Quality Initiatives

In 2019, Cleveland celebrated the 50th year since the infamous burning of the Cuyahoga River downtown. This event sparked widespread efforts to reduce pollution and improve water quality that have elevated quality of life downtown and renewed the river as a recreational amenity and tourism attraction. Today, great blue heron and several species of fish have returned to the waterfront, and the EPA removed restrictions on consumption of fish caught in the river. Rowing and sailing have become increasingly popular. The Western Reserve Rowing Association oversees eight different rowing organizations, and the Foundry On-The-River features the longest rowing docks in the world.

In addition, the Northeast Ohio Regional Sewer District Board of Trustees will invest \$3 billion over a 25-year period to improve water quality in the region by reducing

raw sewage overflows. In addition to the construction of new tunnels to separate sewage, an agreement with the federal government calls for investment in green infrastructure—such as wetlands, bioswales, and retention ponds built on vacant parcels—that complement economic development in the city.

Downtown Cleveland Alliance is doing its part to improve water quality. In a unique aquatic partnership, DCA partners with the Cuyahoga County Port Authority to operate two water vessels, *Flotsam* and *Jetsam*. DCA ambassadors navigate and operate these vessels on the Cuyahoga River and in Lake Erie's North Coast Harbor. In 2018, the ambassadors removed 1,233 logs and 154,000 pounds of trash and debris from downtown waterways.





Downtown Profile | Summary

Downtown serves as the center of activity for the Cleveland region. It houses about four percent of the city's population, a number expected to grow to 30,000 residents by the end of 2032. Downtown's population has grown while preserving the area's historic fabric and enhancing the public realm, where improvements have included upgraded waterfront amenities and renewed parks and public spaces like Public Square and Playhouse Square.

Using data collected for *The Value of U.S. Downtowns and Center Cities* study, we identified three tiers of downtowns, defined by their stage of development. We divided the study downtowns into *established*, *growing* and *emerging* tiers based on the citywide significance of downtown population and jobs, density of residents and jobs within the district, assessed value per square mile, and the rate of growth in population and jobs from 2000 to 2017.

These tables show how downtown Cleveland compares to its peers in the growing tier, and to the citywide averages for tier cities. For the full set of cities by tier, accompanying data points, and methodology, please refer to the *Value of U.S. Downtowns and Center Cities* compendium.*

Cleveland has a "growing" downtown. Growing downtowns have lower citywide significance in terms of jobs and population (averaging 4% of the city's population and 23% of jobs), but have medium-high density and are growing. The smaller downtowns in this tier enjoyed the fastest growth of all downtowns in the study.

Compared to its peers, Cleveland has experienced an extraordinary rate of population growth since 2000. Its population doubled during a period when its peers averaged only 34% growth. However, this growth has not yet translated to high densities; and downtown Cleveland's 10.3 residents per acre trails the average population density in the growing tier of 12.3 residents per acre.

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

Growing Downtowns

ATLANTA	CLEVELAND	SACRAMENTO
AUSTIN	DALLAS	TEMPE
BOISE	INDIANAPOLIS	UNION SQUARE BID
CHARLOTTE	NORFOLK	

Median of **2.5%** of the citywide land area with an average assessed value of **\$7.9 billion** (11% of citywide assessed value) and accounts for:

	DOWNTOWN CLEVELAND	GROWING DOWNTOWNS
CITYWIDE POPULATION	3.7%	3.8%
MILLENNIALS LIVING CITYWIDE	8.3%	5.3%
PROPERTY TAX REVENUE	24.6%	21%

RESIDENTIAL



	DOWNTOWN CLEVELAND	GROWING DOWNTOWNS	GROWING CITIES
GROWTH AVG. 2000 – 2017	102%	40%	16%
DENSITY RESIDENTS / ACRE	10.1	12.3	7.3
MEDIAN HOUSEHOLD INCOME	\$40K	\$51K	\$54K



EMPLOYMENT

	DOWNTOWN CLEVELAND	GROWING DOWNTOWNS
CHANGE IN DOWNTOWN EMPLOYMENT (2002 – 2017)	-16%	31%
CITYWIDE JOBS	34%	24%
CITYWIDE KNOWLEDGE JOBS	33%	28%
CITYWIDE CREATIVE JOBS	76%	35%
RESIDENTS HOLDING A BACHELOR'S DEGREE OR HIGHER	45%	54%

DOWNTOWN SUSTAINABLE COMMUTE



	DOWNTOWN CLEVELAND	GROWING DOWNTOWNS	GROWING CITIES
	44%	40%	25%



	DOWNTOWN CLEVELAND	GROWING DOWNTOWNS
% CITYWIDE RETAIL SALES	13%	9%
RETAIL SALES PER SQ. MILE	\$216M	\$227M*

*This figure excludes retail sales per square mile for Union Square (San Francisco), which has an extremely high retail sales figure that is an outlier for all downtowns.



	DOWNTOWN CLEVELAND	GROWING DOWNTOWNS
HOTELS	19	26
HOTEL ROOMS	4,853	5,090

	DOWNTOWN CLEVELAND	GROWING DOWNTOWNS	GROWING CITIES
WALK SCORE	91	87	48
BIKE SCORE	56	80	55
TRANSIT SCORE	79	70	42

In contrast to the average growing-tier downtown, Cleveland’s downtown lost jobs 2002–2017 owing to the deep and long-lasting impacts of the post-9/11 recession and the Great Recession. Steady growth since 2010 suggests that downtown has found firmer footing. Cleveland particularly shines in the high percentage of the city’s creative jobs located downtown, and overall it has more than a third of the city’s jobs, marking it as the unquestioned economic center of the city. As more company headquarters move back downtown from the suburbs, the job count should continue to climb and bring the city more in line with peer downtowns.

On vibrancy and identity metrics, downtown has higher-than-average retail sales, although it lags slightly in the number of hotels and hotel rooms, suggesting potential for growth in attracting more visitors to downtown’s assets. Finally, in terms of sustainable mobility, downtown is highly walkable, though its biking infrastructure is less robust than other downtowns in this tier. Transit coverage by bus is good, but the system has reached capacity and the RTA, Northeast Ohio Areawide Coordinating Agency (NOACA, the metropolitan planning organization), and DCA are working on a mobility plan to maximize downtown’s limited resources.



APPENDICES

PROJECT
METHODOLOGY

PRINCIPLES AND
BENEFITS

DATA SOURCES

ADDITIONAL IDA
SOURCES

BIBLIOGRAPHY



Appendix I: Project Framework and Methodology



BACKGROUND

In 2017, IDA launched the Value of U.S. Downtowns and Center Cities study. IDA staff and the IDA Research Committee worked with an initial group of 13 downtown organizations, Stantec's Urban Places as a project advisor, and HR&A as an external consultant to develop the valuation methodology and metrics. Since 2017, IDA has added another 20 downtowns or urban districts to the study database, and worked with their respective urban place management organizations (UPMOs) 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 33 downtowns and urban districts studied to date represent diverse geographic regions and have relatively comparable levels of complexity and relationships to their respective cities and regions.

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 distinctiveness, cultural and historical heritage?
- How does a downtown's diversity 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?



PROJECT PURPOSE

The project measured the performance of U.S. downtowns using metrics developed collaboratively and organized under five principles that contribute to a valuable urban center. This study:

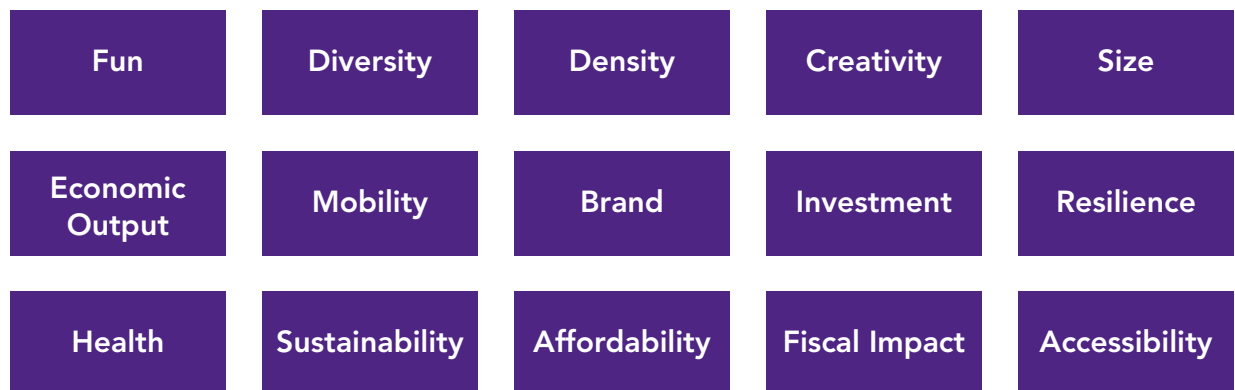
- Provides a framework of principles and metrics to guide data collection for evaluating the value of downtowns and center cities.
- Standardizes key metrics for evaluating the economic, social, cultural and environmental impacts of American downtowns.
- Develops an industry-wide model for calculating the economic value of downtowns, creating a replicable methodology for continued data collection.
- Provides individual analysis and performance benchmarks for participating downtowns in this standardized framework, including supplemental qualitative analysis.
- Empowers and continues to support IDA members' economic and community development efforts through comparative analysis.

THE FIVE PRINCIPLES



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.



DETERMINING PRINCIPLES FOR A VALUABLE DOWNTOWN

This project began with a Principles and Metrics Workshop held in 2017 with representatives of UPMOs from the 13 pilot downtowns. The workshop focused on developing value principles that collectively capture a downtown's multiple functions and qualities, and its contributions to the city and region. They identified five principles that became the organizing framework for determining benchmarking metrics.

Downtown advocates tailor their advocacy to the interests of different audiences. For instance, 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 UPMO 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. The study team sought arguments that would appeal to multiple audiences and worked to identify metrics that could support multiple statements about downtown value. The workshop identified these 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.

METRICS SELECTION

To identify metrics that allow comparisons across jurisdictions, we made sure necessary comparison data was available for every (or almost every) downtown, city, and region. We favored data that would 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.

Specifically, we chose metrics like population, employment, and assessed value for which we could reliably obtain data. We used more specialized data—I figures for downtown visitors or hotel tax revenue—when it helped tell a particular downtown story. Comparisons across jurisdictions, however, focus on commonly available metrics.

We expect most downtowns to rely on similar sources of proprietary data, but participating downtowns may prefer one source over another when obtaining similar data on metrics like commercial real estate (e.g., Colliers vs. CBRE). To the extent possible, instructions require that data sources remain consistent across geographic scales (downtown, city, region) and consistent over time for longitudinal analysis.

The study team analyzed metrics and comparisons to develop value statements about each downtown or district. 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, the share of the city's financial services jobs located downtown, and the number/list of large financial services companies headquartered downtown will help make the case that downtown has great importance to that sector and therefore the city.

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 its city's financial services sector is healthy and thriving. Comparing the growth of this sector in other downtowns, or the concentration of financial services jobs relative to other downtowns would highlight the strength of the downtown's appeal to financial services businesses.

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

For this level, the UPMO might include news reports of financial services companies choosing to open offices downtown. An interview with a company executive on why a firm chose to locate downtown would also be a powerful anecdote on downtown's appeal.

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



DEFINING DOWNTOWN

This study defined the commercial downtown as extending beyond the boundaries of a development authority or a business improvement district. For one thing, geographic parameters vary across data sources and frequently did not align with a UPMO's jurisdiction.

Urban place management organizations vary widely in how they define their service geography. To make boundaries replicable and comparable across data sources, the study team recommended aligning each downtown study area 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 subdivides 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.

Each downtown provided IDA with the geography selected 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.

PROJECT PROCESS

DATA COLLECTION

Both IDA and the local partner spent the first phase of the project collecting data for the study. IDA collected data primarily from national databases (see Appendix 3 for data sources), and the local partner worked with its data partners to obtain other locally-specific data. In instances where local data was not available, we allowed substitution or approximation for some metrics if clearly noted and explained.

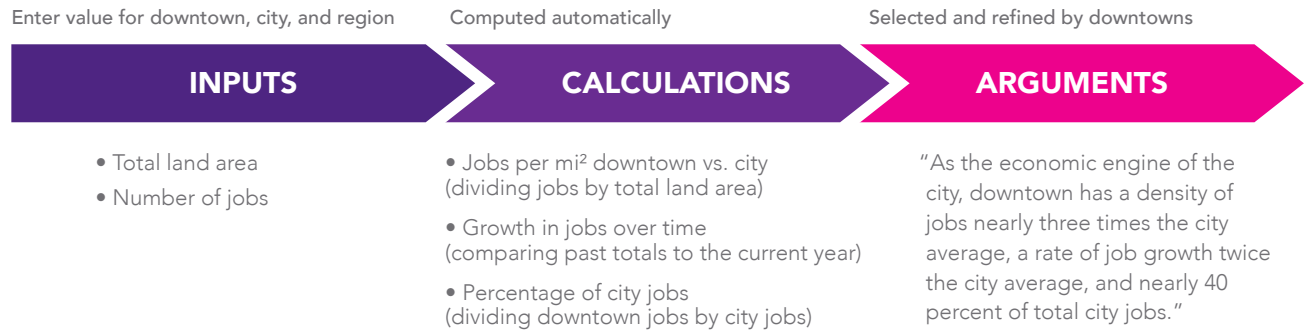
CALCULATIONS AND ANALYSIS

After compiling the data, we plugged all the information into an IDA database for analysis. The database organizes the data by metric, year, and geography for each district. This specialized tool also tabulates numerous ratios, percentages, changes, and comparisons used in the report. As an example, after plugging in employment and land area data the tool can calculate:

- Percent of citywide and regional jobs
- Percent of citywide and regional land area
- Percent total job growth between specified years
- Percent job growth between specified years broken out by industry
- Average jobs per square mile
- Percent of employment in knowledge industries
- Percent of citywide and regional knowledge jobs located downtown
- Share of employment by race
- Share of employment by age
- Share of workers living and working within the selected area

Applying this analysis across all years collected and all applicable geographies captured trends over time and within larger contexts. The flow chart of inputs, calculations, and arguments demonstrates how we move from raw data to making arguments in the report. Research staff also use their expertise and knowledge of downtowns to highlight key trends and draw connections between local insights and trends in the data.





BENCHMARKING TIERS

Based on the data collected for this study, we identified three tiers of downtowns, defined by stage of development. We divided the 33 downtowns that have participated to date into “established,” “growing” and “emerging” tiers. Our analysis compared downtown figures to study-wide medians in three areas:

- Density
 - o Jobs per square mile
 - o Residents per square mile
 - o Assessed value per square mile
- Significance to city
 - o Percentage of citywide jobs
 - o Percentage of citywide residents
- Long-term growth
 - o Percent growth in jobs (2002–2017)
 - o Percent growth in population (2000–2017)

Established – These downtowns contain high proportions of their cities’ jobs and residents, are dense and highly valuable to their cities.

Growing – These downtowns have not yet hit a critical level of density and citywide significance but show steady movement toward that critical mass. This group includes both larger downtowns with lower growth rates, and smaller downtowns with exceptional growth rates.

Emerging – Varying sizes and growth rates mark these downtowns, which generally have lower density and a low proportion of citywide jobs and residents. Because the study examined growth rates since 2000, many downtowns that struggled during the recession had a harder time demonstrating significant growth over the longer term despite stronger growth in recent years.

The compendium report *The Value of U.S. Downtowns and Center Cities: Third Edition* has additional data on the performance of emerging, growing, and established tiers of downtowns.

Appendix II: Principles and Benefits

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

Downtowns and center cities are valuable due to their roles as economic anchors for their regions. As traditional centers of commerce, transportation, education, and government, downtowns and center cities frequently serve as hubs of industry and revenue generators despite only occupying a small fraction of citywide land area. Downtowns support high percentages of jobs across many different industries and skill levels. Because of their relatively high density of economic activity, investment in the center city provides a greater return per dollar for both public and private sectors.



Illustrative metrics:

- Annual private investment
- Annual public investment
- Assessed value
- Average office vacancy rate
- Average Class A office rent
- Average Class B office rent
- Average Class C office rent
- Employment (primary jobs)
 - By two-digit NAICS employment sectors
 - By earnings
 - By residence
 - By demographics
- Hotel tax
- Income tax
- Incubator and co-working spaces
- Investment in construction projects
- Number of approved building permits
- Number of Fortune 1000 headquarters
- Office inventory
- Office space under construction
- Office square footage in pipeline (to be completed in three years)
- Property tax
- Parking tax
- Sales tax

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.

As the literal and figurative heart of the city, downtowns welcome residents, employees, and visitors from all walks of life. Residents of strong downtowns often come from a wide range of racial, socioeconomic, cultural, and educational backgrounds, and represent all ages. This diversity ensures that as an inclusive place, a downtown has broad appeal to all users and a strong social fabric.



Illustrative metrics:

- Average residential vacancy rate
- Demographics
- Diversity Index
- Employment diversity
- Foreign-born residents
- Homeless residents
- House value for owner-occupied housing units
- Households by income
- Median gross rent
- Median home price
- Median household income
- Rent-burdened residents
- Resident population
- Resident population by age
- Resident population by highest educational attainment
- Resident population by race and ethnicity
- Residential inventory
- Residential units in pipeline (to be completed in three years)
- Residential units under construction
- Subsidized housing units
- Zillow median rental listing price by number of bedrooms
- Zillow median rental listing price per square foot by number of bedrooms

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.

The ability of vibrant places to attract visitors and new residents, as well as a regionwide consumer base, creates value. Vibrancy is the buzz of activity and excitement that comes with high-quality experiential offerings like breweries, restaurants, theatres, or outdoor events. As the cultural center of its city, downtown typically attracts a large share of citywide visitors and holds a large share of citywide hotels and hotel rooms. 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:

- Annual festivals/parades
- Average hotel occupancy rate
- Average retail rent
- Average retail vacancy rate
- Average visitor length of stay
- Convention centers
- Gyms and fitness studios
- Hotel rooms
- Hotels
- Outdoor events permitted by city
- Population
- Retail businesses (retail trade and food & drink)
- Retail demand (retail trade and food & drink)
- Retail sales (retail trade and food & drink)
- Retail space in pipeline (to be completed in three years)
- Retail space inventory
- Retail space under construction
- Venues with live entertainment
- Visitation by origin
- Visitors

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.

Downtowns and center cities are often iconic symbols of their cities, and this strong sense of place enhances local pride. The distinctive cultural offerings in downtown enhance its character, heritage, and beauty, and create an environment that other parts of the city can't easily match. 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.

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:

- Convention attendees
- Conventions
- Farmers markets
- Libraries
- Locally designated historic districts
- Locally designated historic structures
- Media mentions
- Museums
- National Register of Historic Places districts
- National Register of Historic Places structures
- Number of followers on Facebook
- Number of followers on Twitter
- Number of posts with Instagram hashtag
- Parks and natural areas
- Playgrounds
- Plazas/squares/amphitheater or other public outdoor gathering spaces
- Postsecondary institutions
- Postsecondary students
- Primary and secondary schools (public and private)
- Public art installations
- Public pools
- Recreation and community centers, both public and private (e.g., YMCA)
- Religious institutions
- Sports stadiums
- Sports teams

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.

As key centers of economy and culture, being resilient to city, regional, or even national shocks is highly important for ensuring stability, sustainability, and prosperity. Because of diversity and density of resources and services, center cities and their inhabitants can better absorb economic, social, and environmental shocks and stresses than the surrounding cities and regions. The diversity and economic strengths of strong 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 hit less economically and socially dynamic areas particularly hard.



Illustrative metrics:

- Acreage of open space
- Annual greenhouse gas emissions per household
- Average life expectancy
- Average property crime rate
- Average violent crime rate
- Bike Score
- Bike share stations
- Community gardens
- Commute mode for workers 16 and over
- Commute time for workers 16 and over
- Docked bikes
- Dockless bikes
- Electric car charging points
- Housing and Transportation Index
- LEED-certified buildings
- Miles of bike lanes
- No leisure-time physical activity among adults aged > 18 in the last month
- Resident population in poverty
- Scooters
- Transit Score
- Transit stops (including rail and bus)
- Unemployment rate
- Walk Score

Appendix III: Data Sources

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

Source	Data Available	Pricing	Geographic Limitations	Most Recent Data Vintage in the Study
ESRI	Demographic, Housing, Detailed Establishments and Consumer Spending	Proprietary	None; allows for drawing of custom geographies; selection of sub-geographies down to census block group level	2017 to 2019 by data set (Annual Updates)
Social Explorer	Demographic, Housing, Crime, Employment	Proprietary	Allows for selection of sub-geographies down to the census block group level	2017 (Annual Updates)
American FactFinder	Demographic, Housing, Crime, Employment	Public	Allows for selection of sub-geographies down to the census block group level	2017 (Annual Updates)
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	2017 (Annual Updates)
Center for Neighborhood Technology	Housing affordability, Sustainability, Income	Public	Allows for selection and exporting of sub-geographies down to census block group level	2017 (Updates Unscheduled)
Zillow	Housing and rental costs	Public	The smallest geographies are arbitrarily designated "neighborhoods," some of which line up with the study areas, others of which don't or don't exist. In these cases, we got as close as we could with a ZIP Code	April to June 2019 (Monthly Updates)
National Register of Historic Places	Historic structures and districts	Public	None	2019 (Annual Updates)
Geolounge	Map of Fortune 1000 companies	Public	ZIP Code	2018 (Annual Updates)
Centers for Disease Control and Prevention	Life expectancy, physical inactivity and other health data	Public	ZIP Code	2017 (Annual Updates)
FBI Uniform Crime Reporting	Crime Rates	Public	City and Metro	2017 and 2018 (Annual Updates)

Appendix IV: Selected Study Definitions

Assessed value

Assessed value is the dollar value assigned to a property to measure applicable taxes. This figure is an aggregate for all property within the study area, or for the closest match to the study area for which data is available.

Acreage of open space

This figure is the total acreage of designated public spaces like parks or plazas; it does not include vacant lots.

Census block group

A block group is a statistical division of a census tract, generally defined to contain between 600 and 3,000 people, that is used to present data and control block numbering in the decennial census.

Census tract

A census tract is a small, relatively permanent statistical subdivision of a county or equivalent entity, updated by local participants prior to each decennial census.

Creative jobs

The study uses the NAICS industry sector of Arts, Entertainment, and Recreation to count creative jobs.

Development pipeline

Development pipelines include projects very recently completed, currently under construction, and planned for completion within the next three years.

Diversity Index

The Diversity Index is a measurement of the likelihood that any two randomly selected individuals will be of a different race or ethnicity. The closer the number comes to 100, the more likely the two will be different, indicating diversity.

Employment

The study uses the LEHD on the Map tool to count "primary jobs." Distinct from total jobs, primary jobs count only the highest-wage job when an individual holds multiple jobs at a time. This figure may not accurately reflect less traditional types of employment like gig work or small startups.

Event venue

Event venues include spaces typically used for public events such as conferences, conventions, concerts. This metric is somewhat subjective in that data is collected locally, and the downtown determines what qualifies for inclusion. For example, a downtown might include a venue that is largely private but represents a part of the fabric of the event community.

Farmers markets

The number of farmers markets is a count of both permanent and seasonal farmers markets.

Greenhouse gas emissions

The Center for Neighborhood Technology's Housing and Transportation Index includes an estimate of CO2 emissions per household within a given area.

Housing and Transportation Index

The Housing and Transportation Index, produced by the Center for Neighborhood Technology, measures how much an average household spends on housing and transportation relative to income. This figure demonstrates how urban places often have higher base rents, but much lower transportation costs.

Knowledge jobs

Knowledge jobs consist of jobs in the NAICS industry sectors of Information; Finance and Insurance; Real Estate and Rental and Leasing; Professional, Scientific, and Technical Services; Management of Companies and Enterprises; and Health Care and Social Assistance.

Media mentions

This study sometimes uses independent sources to add nuance to the data. Forbes's list of top 100 metro areas to start a new business represents this type of source. Another example might be a travel blog praising restaurants or entertainment options within the downtown. While not always quantitative sources, media mentions add color and perspective to the report.

Middle-class

This study defines middle-class as between 67% and 200% of area median income. This range was calculated for each downtown based on the median income of the region.

Millennial

This study defines residents between the ages of 18 and 34 as millennials.

No leisure-time physical activity

Presented as a percentage, no leisure-time physical activity is the share of residents within the geography who have not engaged in physical activity in their spare time within the past month from the time surveyed.

Private investment

Private investment is defined as money from private sources being invested in development. This figure is sometimes replaced by a sum of the largest development projects within the study area.

Public art installations

This figure counts art installations that may be owned by either public or private entities and may be temporary or permanent. They must, however, be easily accessible by the general public.

Public investment

Individual UPMOs may define public capital investment differently, but the figure generally includes municipal, state, and federal investment in capital projects downtown (such as open space or infrastructure). If only a specific bucket of public investment is available for measurement (for example, municipal public investment), this can be measured and footnoted in the profiles in lieu of capturing investments by other levels of government.

Rent-burdened

Households paying more than 30% of their income to rent are considered rent-burdened.

Retail demand

Retail demand measures the total spending potential of an area's population, as determined by residential population and household income characteristics.³

Retail sales

Retail sales measure total sales by businesses within the observed geography. All estimates of market supply are in nominal terms and are derived from receipts (net of sales taxes, refunds, and returns) of businesses primarily engaged in the sale of merchandise. Excise taxes paid by the retailer or the remuneration of services are also included—for example, installation and delivery charges that are incidental to the transaction.⁴

Sales to non-residents

Sales to non-residents represents an estimate calculated by using figures for retail demand and sales to determine how much of downtown retail sales are to people who don't live in downtown. Simply put, retail sales – resident retail demand = sales to non-residents.

Sports teams

The number of professional teams within the geography. This figure excludes college teams.

Additional IDA Sources

IDA's Vitality Index, powered by Stantec (2019): The IDA Vitality Index, powered by Stantec, is an interactive, online tool to benchmark the vitality of downtowns across the U.S. The Vitality Index reflects the pioneering IDA research in *The Value of U.S. Downtowns and City Centers*, and measures vitality through three principles identified in the VODT study: economy, inclusion, and vibrancy. Through these three principles, and five core indicators in each principle, the Vitality Index aims to capture the pulse of the downtown and enable urban place managers to quantify and benchmark their district's performance metrics among peer cities. The index uses a benchmarking system to understand how each of three vitality principles contributes to an overall combined score, calculated by comparing each metric to the national average. Most valuable, the index serves as a baseline and provides insights for the strategic evolution of a community.

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 to help Canadian place management organizations establish and sustain evaluation and compare progress among downtowns. While geared toward Canadian downtowns, the toolkit has value for urban districts outside 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.

Downtown Rebirth: Documenting the Live-Work Dynamic in 21st Century U.S. Cities: 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 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.

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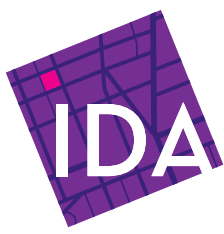
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