



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

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

A 2019 PUBLICATION CREATED BY  
THE INTERNATIONAL DOWNTOWN ASSOCIATION



**INSPIRED LEADERS  
SHAPING CITIES**

## ABOUT IDA



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

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# THE 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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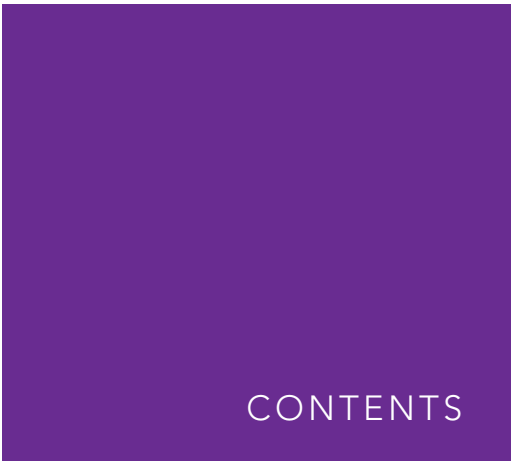
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SECTION ONE  
PROJECT  
OVERVIEW



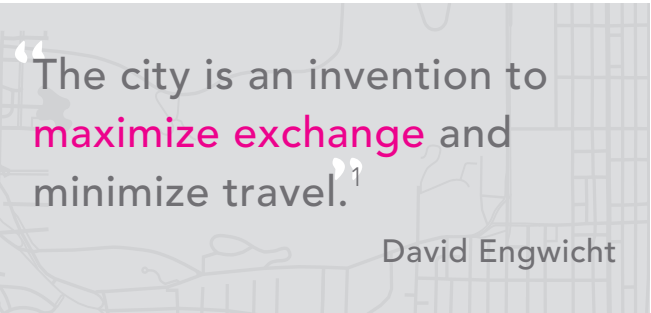
## Introduction

### 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.

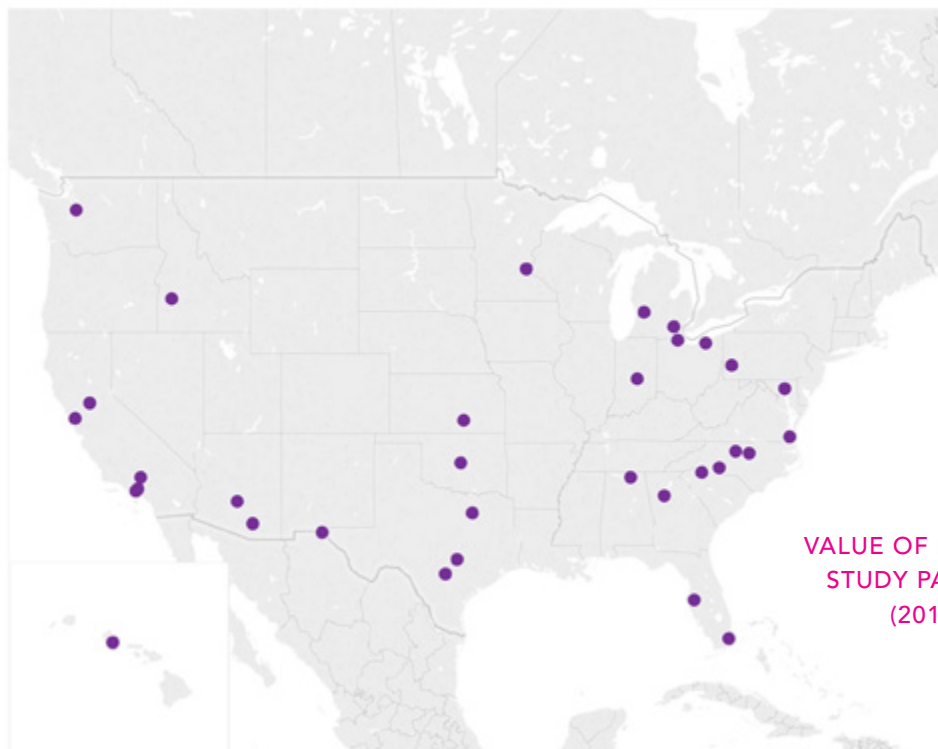


Expand the **range of arguments** UPMOs can make to their stakeholders using publicly available data.

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 Overview<sup>i</sup>

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."<sup>2</sup> 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.*



<sup>i</sup> 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 the entire region's economic productivity, inclusion, vibrancy, identity, and resilience.

## Study Area

DOWNTOWN PARTNER

ConnecToledo

CITY

Toledo, OH



**“The city has never been in better shape,”** said Bob Savage, a Toledo-born civic leader, in a 2017 interview with Alan Soloman for the *Chicago Tribune*. **“It’s the rejuvenation of downtown that’s making it happen.”**<sup>1</sup> New sports and cultural offerings added to downtown since 2000 bring in visitors by the thousands—even tens of thousands—on game or event nights. This new energy has invigorated a growing food and bar scene, creating a buzz and sense of liveliness in downtown. The renewed life and traffic spurred by the stadiums built in the 2000s refocused attention on unique assets downtown has had for decades, like The Valentine Theatre, and it enabled the establishment of unique new spaces like Gathered Glassblowing Studio. Together, downtown amenities have won Toledo recognition and accolades from publications like Livability.com.

Despite these victories, data doesn't show dramatic economic and residential growth in downtown. Yet key underlying trends point in a positive direction. Despite overall population decline since 2010, more middle-class and high-income households have begun choosing to live downtown, signaling growing appeal to a demographic group with the means to live anywhere. While office vacancy rates remain high, the region's largest employer, ProMedica Health System, moved its headquarters downtown in 2017.

In fact, 2017 proved to be a landmark year for downtown improvements. ProMedica's arrival brought 1,000 workers to a renovated historic space on the downtown riverfront, work began on the waterfront Metropark, Promenade Park was renovated, and the ambitious Downtown Toledo Master Plan won approval.


Growth rates and trends aside, downtown serves as a significant employment center and revenue generator for the city. With less than 2% of citywide land area, it hosts 18% of citywide jobs and produces 9% of citywide property tax revenue.



## Residential Population

	Downtown	City	Region
Population	3,742	279,455	605,204
City Share	1%	n/a	n/a
Per Square Mile	3,198	3,463	444
Residential Growth 2000-2017	12%	-10.9%	-2.1%

Source: U.S. Decennial Census (2000); American Community Survey 5-Year Estimates (2013 – 2017)



## Employment Population

	Downtown	City	Region
Jobs	25,135	139,973	310,121
Downtown Share	n/a	18%	8%
Per Square Mile	18,347	1,735	227
Worker Population Growth 2017-2019	-1.5%	n/a	n/a





Source: ESRI Business Analyst Business Summary Reports (2019, 2017)

Downtown was home to around 3,750 residents as of 2017, an increase of 400 and 12% since 2000. During the same period, both the city and region lost population. Data sources offer different growth estimates for the period since 2010. A clearer picture will emerge over time, but 475 new residential units under construction represent an encouraging sign of further growth.

The average job density in a square mile of greater downtown is a magnitude higher than the citywide or regional average. This concentration of jobs points to greater downtown’s role as a key regional employment hub. Despite a slight decline in employment between 2017 and 2019, greater downtown still contains a significant share of city and regional jobs.

The greater downtown has a large share of the region’s office space and had a 16% vacancy rate in 2016. The cost per square foot to rent office space remains very low—a big attraction for small businesses and startups. In addition, as the downtown master plan points out, downtowns have become increasingly attractive to employers in recent years for their walkability, potential for interaction, and unique sense of place. The combination of downtown appeal and low rents could act as a powerful draw for new businesses. The downtown master plan estimates 10-year office demand at 760,000 square feet, if greater downtown can capture 25% of regional employment growth, or attract new jobs to the market. That would require no new office development, as greater downtown already has 1.4 million square feet of vacant commercial space.

## Inventory

	Greater Downtown	% of Region	Per Square Mile
 OFFICE (SF)	9.2M	30%	7.8M
 RETAIL (SF)	1.3M	n/a	1.1M
 RESIDENTIAL (UNITS)	2,257	n/a	1,966
 HOTEL (ROOMS)	535	8%	457

Source: CoStar (2016); Downtown Toledo Master Plan (2017)

“Greater downtown,” shown in orange on the comparison map, includes the section between Monroe Street and I-75 that houses a large number of jobs; applying the geography used for the rest of the study, shown in purple, would have excluded them from the report data.

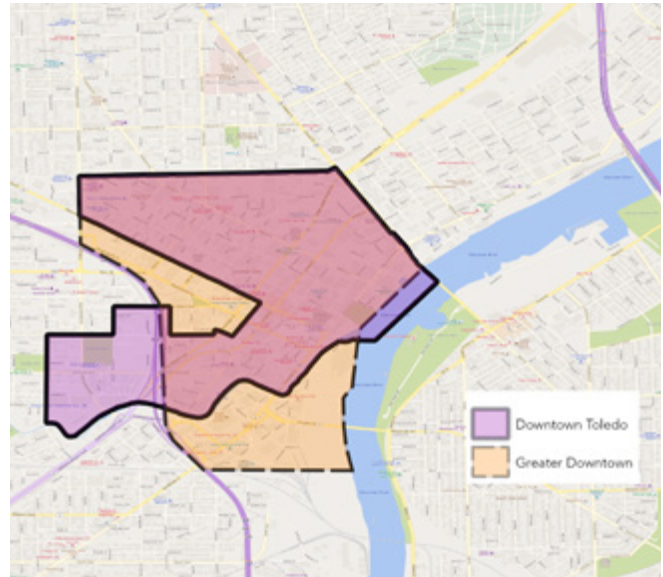
IDA and ConneCToledo wanted to build a deeper understanding of downtown’s contribution to citywide and regional performance across a range of areas. IDA grouped these areas under five principles—economy, inclusion, vibrancy, identity, and resilience—developed in 2017 in workshops with the first cohort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

### Defining Boundaries

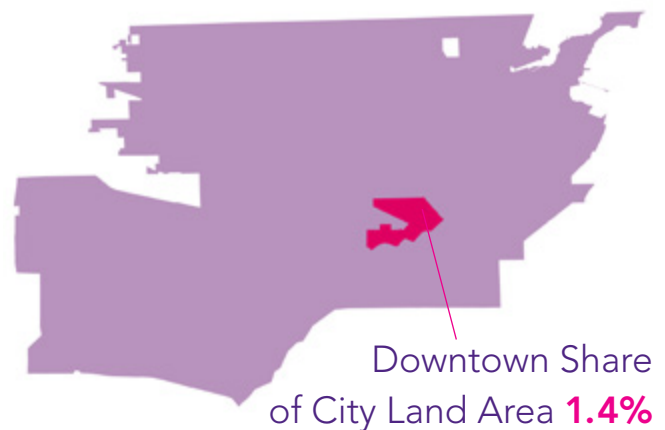
This study area extends beyond the boundaries of the business improvement district; geographic parameters vary across data sources and don’t typically align with a place management organization’s jurisdiction. For this study, IDA recommended that participating urban place management organizations use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

As noted, this report used data from two overlapping geographies. Employment, tax, property value, and a few other figures refer to “greater downtown,” which aligns closely with the boundaries used for the downtown master plan. All other data came from “downtown” or “the study area.” Each table notes the boundary to which its data refers. Geographic limitations of available census data required this split. The study team had no accurate way to capture the economic core of downtown using only census tracts or block groups. The census tract-based boundary excluded a key area of downtown employment, making the resulting employment numbers a poor reflection of downtown’s employment base. Adding the census tract containing the rest of downtown’s economic core would have meant including a large area beyond the boundary of what Toledoans consider downtown.

The study area comprises three census tracts: 27, 28, and 37. Its boundary begins just east of the Toledo Art Museum at Collingwood Boulevard, which it follows north to Woodruff



*Downtown Toledo study area and Greater Downtown*



Avenue. Moving east on Woodruff to the intersection of Cherry Street, the border then follows Cherry southeast to the Maumee River and turns southward. The boundary then tracks Swan Creek west to City Park Avenue, which it follows north to Belmont Avenue. The boundary includes a few additional blocks north of Belmont between Division Court, Indiana Avenue, and S. 15th Street. At Belmont’s intersection with Lafayette the boundary proceeds east for a block, then follows S. Ontario Street northeast to Monroe Street, where it proceeds northwest to reconnect with Collingwood Boulevard.



# 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

Greater downtown contains a significant share of the Toledo's economic assets, especially its jobs. With just over 25,000 jobs, it concentrates 18% of citywide employment into a little more than one square mile. The largest sectors are public administration; professional, scientific, and technical services; and health care and social assistance. Within these sectors, greater downtown contains 63% of the city's public administration jobs and 48% of professional, scientific, and technical service jobs. Greater downtown is a regional hub for knowledge work, housing a total of 10,500 knowledge jobs. This accounts for 8% of all knowledge jobs in the MSA, despite downtown's only occupying 0.09% of metro land area.

Some of the largest companies in Northwest Ohio—including ProMedica, HCR Manor Care, Owens Corning, and Libbey—maintain headquarters or a major facility downtown. The Regional Growth Partnership, an economic development group serving Northwest Ohio, reports that these four enterprises employ a combined 18,850 people in downtown and across the region.<sup>2</sup> On the other end of the spectrum, downtown offers a welcoming environment for small businesses. Office space rents for slightly less than space

## Greater Downtown Employment



18%  
CITY'S JOBS



18%  
CITY'S KNOWLEDGE  
INDUSTRY JOBS



11%  
CITY'S CREATIVE  
JOBS

Source: ESRI Business Analyst Business Summary Reports (2019)

elsewhere in the city while offering the intangible advantages of proximity to potential collaborators and business partners.

In addition, downtown provides a variety of services for entrepreneurs and startups. Two of the three coworking spaces in the city operate in downtown, SEED Coworking and Rustbelt Works. SEED, created by local entrepreneurs through a Kickstarter campaign, serves as headquarters for multiple software developers, artists, and small business owners. By offering discounted space to students and hosting events and meetups for the entrepreneurial community, SEED adds a level of social and community value. A recent addition, Jumpstart, operates as part of the Ohio Third Frontier initiative, which supports technology

startups. Supported by a public and private partnership among KeyBank and other banks, the Toledo Community Foundation, the City of Toledo, University of Toledo, and Bowling Green State University. Jumpstart provides financial assistance, technical support, and mentoring to local small business owners. ConnecToledo also acts as an approved micro-lender through KIVA.

### Fiscal Impact

Greater downtown contains 9.1% of Toledo's overall assessed value. On average, one square mile of land within greater downtown boasts \$454 million more in value than a square mile of land elsewhere in the city and carries the same value as 39 square miles of the MSA. Greater downtown's value continues to rise, even as citywide value has declined.

The City relies increasingly on greater downtown as a revenue generator. In 2010, it provided only 6% of citywide property tax revenue. By 2017, that proportion had increased to 9%. Per square mile, greater downtown generates \$53.3 million in tax revenue, compared to a citywide average of \$9.9 million. Since 2000, property value and tax revenue from greater downtown have increased 48%, while citywide value and revenue have declined by 10%. This demonstrates why the city should encourage public and private investment in downtown: downtown property produces a much higher return on investment than anywhere else in the city or region.

Development interest in downtown has grown in recent years. One of the biggest wins for downtown came with ProMedica's relocation to the former Toledo Edison Steam Plant in 2017. ProMedica, a health system operating in 28 states, spent \$46 million renovating the interior of the historic brick facility on the riverfront into modern office space, accommodating approximately 1,000 employees in the heart of downtown. A vocal supporter of downtown, Randy Oostra, ProMedica's CEO, has made clear his hope that the move will encourage more growth in the future and accelerate downtown revitalization.<sup>3</sup>

Greater downtown Toledo's assessed value is **\$764M**,



more than **9%** of the city's total assessed value.

Source: Lucas County Auditor (2017); City of Toledo (2016 to 2019)



## Land Value and Investment

	Greater Downtown	City	Region
<b>ASSESSED VALUE</b>	\$764M	\$8B	\$19B
<b>AREA IN SQUARE MILES</b>	1.37	80.6	1.3K
<b>VALUE PER SQUARE MILE</b>	\$558M	\$104M	\$14M
<b>PUBLIC AND PRIVATE INVESTMENT SINCE 2016</b>	\$332M*	n/a	n/a

\*Some developments do not report an investment figure and are excluded from this total

Source: Lucas County Auditor (2017); City of Toledo (2016 to 2019)

## Knowledge Industry Employment Growth 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



Share of Citywide Jobs

40%

2%

48%

43%

8%

Total Jobs Greater Downtown

1,409

3

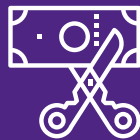
4,305

1,764

3,016

Source: ESRI Business Analyst Business Summary Reports (2019)

## Tax Impact



	Greater Downtown	% of City	% of Region
PROPERTY TAX	\$72M	9%	4%

	Greater Downtown	City	Region
PROPERTY TAX REVENUE CHANGE SINCE 2000	48%	-10%	8%

Source: Lucas County Auditor (2000, 2017)

Over the last three years, greater downtown has seen a healthy infusion of investment from both public and private sectors, averaging a combined \$110,700,000 annually. Another key indicator of growing downtown development interest comes in the volume of building permits approved annually. In 2010, the City approved only 53 construction permits in downtown, representing a combined investment of \$3.4 million. In 2017, the number of approvals tripled to 174 and totaled \$90.7 million in investment—21% of all money spent on permitted construction projects citywide.

# 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.

## Resident Diversity

Downtown displays much greater diversity than the larger region, with a Diversity Index score of 56 compared to 46 for the region. (The Diversity Index, an indicator of the mix of residents within an area, expresses the probability that two random people within the district identify as different races or ethnicities.) Downtown has a much higher concentration of black residents than the city or the region.

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

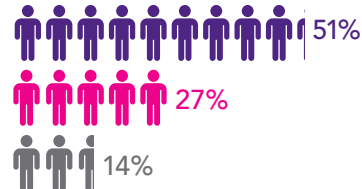
“Inclusive spaces in the public realm, particularly in our cities’ downtowns, can help break down the social barriers that often divide us. Thriving downtown districts and public spaces promote not only economic prosperity, but also social cohesion.”<sup>5</sup>

## Residents By Race\*

### WHITE



### BLACK



### ASIAN



### ALL OTHER



### HISPANIC OR LATINO



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



The black population has declined 13% (a drop of 300 residents) since 2000, while the white population has increased 60% (an increase of 540 residents). This shift represents the inverse of the city and region, which have seen rising black population and falling white population. The number of Hispanic residents downtown has more than doubled since 2000 (an increase of 150 residents) and has risen across the city and region despite overall population loss. Since 2000 the city has added 6,000 Hispanic residents and the MSA has added 13,000.

### Lucas County “Certified Welcoming” for Immigrants and Refugees

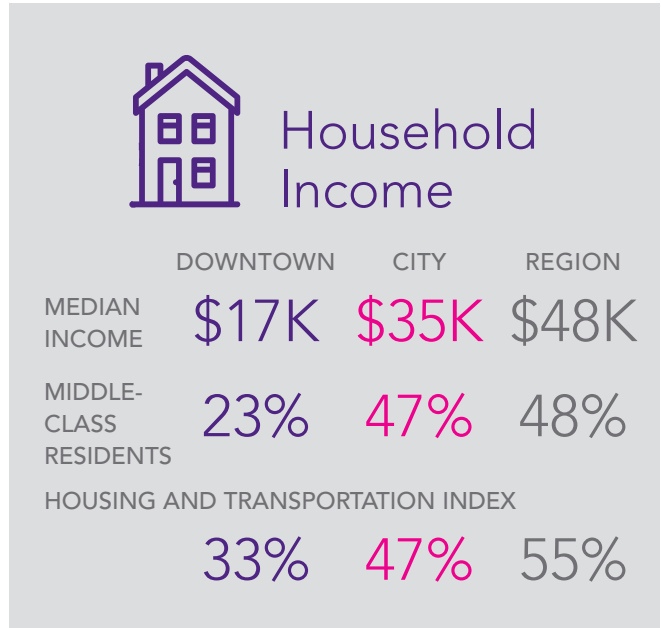
In April 2019, Lucas County won a “Certified Welcoming” designation from Welcoming America, a national nonprofit that provides guidance and support to help communities become more inclusive toward immigrants and refugees. “To become certified,” according to the group, “communities undergo a rigorous audit to evaluate compliance with the seven categories in Welcoming America’s Welcoming Standard framework: government leadership, civic engagement, equitable access, education, connected communities, economic development, and safe communities.” Since 2000, the share of the Toledo MSA’s population that is foreign-born has risen from 2.9% to 3.5%, for an increase of 3,300 residents. Lucas County Commissioner Gary Byers stated that the “certification recognizes what we have always known in Toledo and Lucas County. Our diversity is our strength. Together, we do better as a community, as a government.”<sup>4</sup>



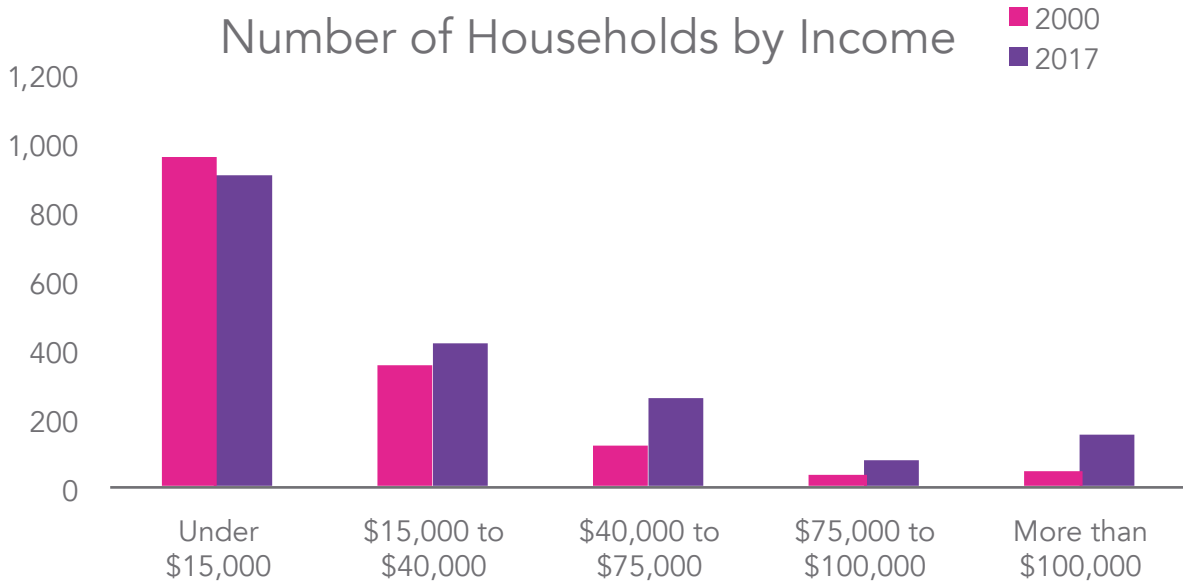
**Socioeconomic Diversity**

The study area has contained primarily low-income residents since 2000, with more than 50% of households earning less than \$15,000 annually. Additionally, 73% of downtown households make less than \$40,000 annually, compared to 42% regionally. At \$17,000, the median household income for downtown residents registers at less than half the citywide median. This has kept rents extremely low: 32% of downtown renters pay less than \$300 per month, compared to 10% citywide.

While median income and rent figures suggest that most people who can afford to live elsewhere still choose to do so, the data shows strong growth in demand for luxury housing downtown and a notable increase in middle- and high-income households. Since 2010, the share of households paying more than \$800 in rent has grown from 9% to 29%. The socioeconomic breakdown of downtown has shifted as well, with the number of households earning above \$40,000 annually more than doubling since 2000.

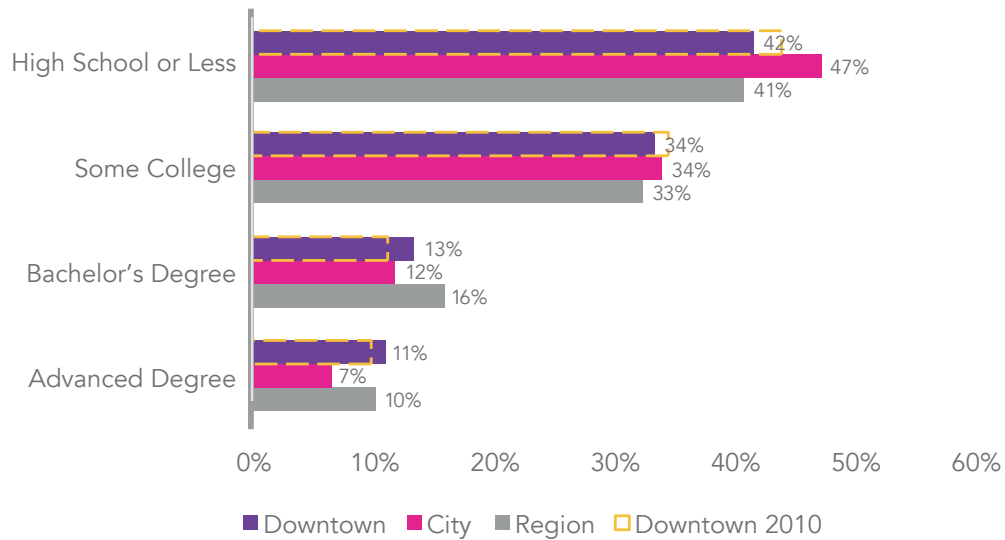


Source: American Community Survey 5-Year Estimates (2013 – 2017); Center for Neighborhood Technology (2017)



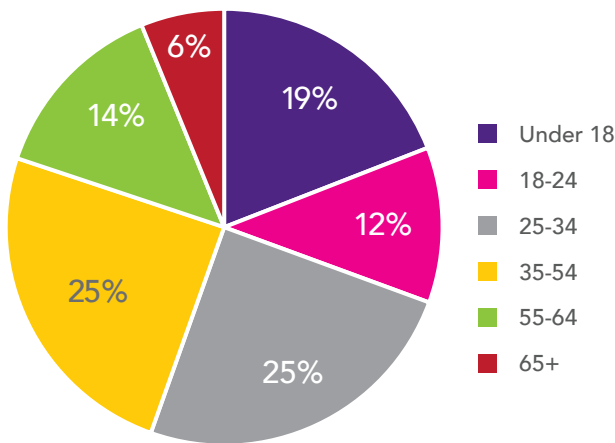
Source: U.S. Decennial Census (2000); American Community Survey 5-Year Estimates (2013 – 2017)

## Educational Attainment for Residents 25+



Source: American Community Survey 5-Year Estimates (2006 – 2010, 2013 – 2017)

## Downtown Residents' Age



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

### Educational Attainment

A quarter of downtown residents hold a bachelor's degree or higher, a rate 7% higher than the city and only 1% behind the region. Since 2000, downtown has added 401 new residents with bachelor's degrees or higher, doubling the proportion of residents with post-secondary education. Despite the increase, downtown still lags peer downtowns on education with the fourth-lowest share of residents with a bachelor's degree or higher among the 33 districts studied.

### Age

Downtown has a mix of residents of all ages, although a relatively small share of residents older than 65. Millennials, aged 18-34, account for more than a third of residents. Within that group, residents aged 25 to 34 have increased from 19% of the population in 2010 to 25% today.

## 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.”<sup>6</sup>

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

### Residential Change

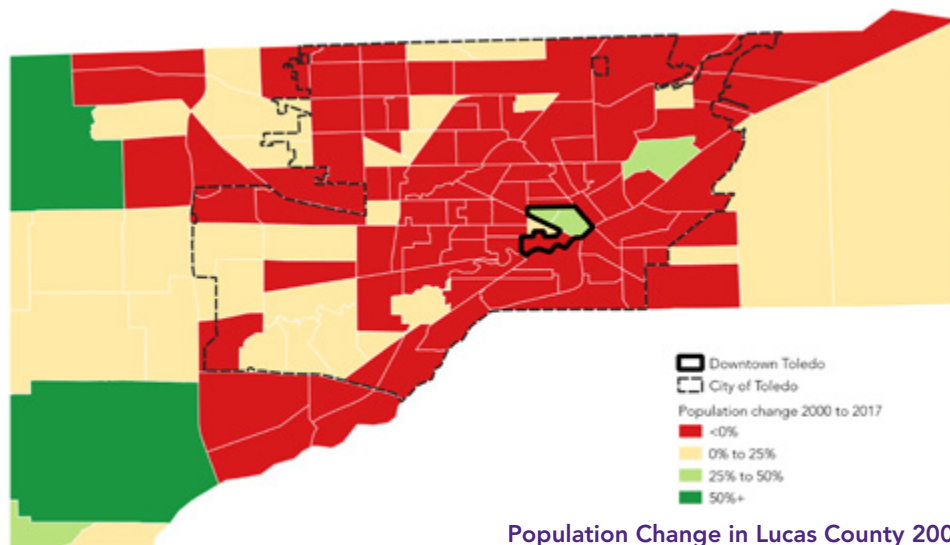


	Downtown	City	Region
RESIDENTIAL POPULATION CHANGE (2000-2017)	12%	-11%	-2%
RESIDENTIAL UNITS IN DEVELOPMENT	580	n/a	n/a

Source: American Community Survey 5-Year Estimates (2013 – 2017); Reichle Klein Report (2017)

### Residential Growth

Census data doesn't reveal a clear trajectory for downtown's population. While sources agree that the count has risen since 2000, different datasets reach conflicting conclusions on whether population has grown or shrunk since 2010. Estimates aside, the 580 units of housing under construction or in planning reflect a growing demand for downtown living and suggest strongly that population is rising. The growing census tracts within downtown (27 and 28) added a combined 713 residents between 2000 and 2017; the third tract (37) lost 313 residents. The accompanying map shows widespread citywide population decline, highlighting the significance of downtown growth in the face of the broader trend.



### Population Change in Lucas County 2000–2017

Source: U.S. Decennial Census (2000) American Community Survey 5-Year Estimates (2013 - 2017)



## All Retail


### TOTAL RETAIL BUSINESSES AND RESTAURANTS

	Downtown	City	Region
	110	2,004	4,415

### RETAIL INVENTORY (SF) PER SQUARE MILE

	Downtown	City	Region
	94	25	3

### NUMBER OF RESTAURANTS AND BARS

	Downtown	City	Region
	84	654	1,411

Source: ConnecToledo (2019); ESRI Retail Marketplace Profile Report (2019)

### Retail Vitality

Downtown’s storefront businesses make up just 5% of all storefront businesses in Toledo yet produce \$24 million more in retail sales per square mile than the citywide average. With four times as many storefronts per square mile as the citywide average, downtown’s retail density creates an engaging and active environment that boosts vibrancy. And this retail serves more than just downtown residents. Of the \$86.3 million spent on retail in the study area, an estimated \$57.8 million—67%—came from people who don’t live downtown. Such a high share of spending by non-residents underscores downtown’s value as a regional destination.

Overall, downtown’s retail inventory has higher vacancy and lower leasing costs than the regional averages. This combination suggests low demand for downtown retail space, yet it doesn’t tell the whole story. Retail thrives within localized active and vibrant places in downtown. Even though more than a quarter of downtown retail space sits vacant, heavily trafficked areas like Hensville have very few vacancies. As downtown revitalization continues, less-central retail locations will likely see growing demand.

## Downtown Retail Sales



		Share of City
Annual Spending	\$86M	2%
Revenue per square mile	\$73M	

Source: ESRI Retail Marketplace Profile Report (2019)

## Retail Market Vitality



	Downtown	Region
SQUARE FEET OF RETAIL	1.3M	n/a
RETAIL VACANCY RATE	24%	14%
RETAIL RENT (SF) TRIPLE NET	\$6.74	\$8.36

Source: Downtown Toledo Master Plan (2017), Reichle Klein Report (2017)

### Live Events and Entertainment

Downtown's greatest asset may lie in the strength and diversity of its entertainment offerings. Certainly, the local consensus holds that events, arts, and entertainment launched and continue to fuel downtown's revitalization. In particular, the area immediately around Fifth Third Field and Huntington Center, where sporting events and arena concerts take place, has injected new energy into downtown and boosted economic growth.

In 2018, Livability.com published "5 Reasons Millennials Should Give Toledo, OH, a Second Look," an article highlighting several key selling points for the city. Each item on the list revolved around downtown—in fact, the list led off with "A Vibrant and Evolving Downtown." The article points to the baseball Mud Hens' 2002 arrival as the start of downtown's rebirth. New bars and restaurants opened around the stadium to capitalize on the increase in visitors, which the opening of Huntington Center a few years later compounded.

The second item on the Livability.com list, "Big City Arts Scene," focuses on the Toledo Museum of Art at the western edge of downtown and on other arts offerings like Art Loop, Valentine Theatre, and creative maker spaces like Gathered Glassblowing Studio.<sup>7</sup> A strong nonprofit, The Arts Commission, has worked to foster local arts since 1959 by launching multiple creative public events and innovative programs. In addition to Art Loop, The Arts Commission also runs the Creative Placemaking Program, which aims to use arts, culture, and creative process as tools for promoting downtown revitalization. The commission's efforts to support and develop local creative talent has helped strengthen and expand Toledo's arts ecosystem.

Another article on Livability.com ranked Toledo as the top minor-league sports city in the U.S. In 2019, the Mud Hens drew 418,500 fans during their season, and the Walleye set a new record for attendance—more than 280,000 helped sell out 25 home games over the previous two seasons. Not only do these teams attract die-hard fans, but they also host family-friendly events before the game and during breaks in play to attract casual fans and families.<sup>8, 9</sup>

Downtown provides the setting for large annual events throughout the year. Among the largest are the Fire + Ice



Source: ConneCToledo (2019), Destination Toledo Convention & Visitors Bureau (2019)

Winter Festival, Toledo PRIDE and Zombie Crawl. In August 2021, Toledo will host the Solheim Cup, a prestigious female golf competition with anticipated attendance of 160,000. Departing from tradition, the Solheim Cup organizers plan to use downtown and not the golf course as the main venue for the opening ceremonies. Downtown's vibrancy played a significant role in tipping the choice of a host city to Toledo.

# 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.”<sup>10</sup> The authentic 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



## Social Media



33,212

PHOTOS POSTED ON  
INSTAGRAM WITH  
#DOWNTOWTOLEDO

12,400

FOLLOWERS ON TWITTER  
@DOWNTOWTOLEDO

24,432


FOLLOWERS ON FACEBOOK  
DOWNTOWN TOLEDO

\* Source: Instagram, Twitter, and Facebook counts as of December 11, 2019

Downtown represents the heart of the city and its cultural center. Toledo takes great pride in its historical roots as a city built by and for makers and manufacturers. It earned the moniker “The Glass City” for a long history of glass production and manufacturing, both industrial and artistic. Glass production remains a big part of Toledo’s economy, with both Owens Corning and Libbey still headquartered downtown. Glassblowing workshops and studios occupy multiple creative spaces around the city. The Toledo Museum of Art features unique pieces of glass art in its collection, and Gathered Glassblowing Studio showcases glass home décor and custom items. Fiat Chrysler’s strong presence, focused on Jeep production, continues the city’s long history as a major center of the automotive industry. Toledo celebrates its relationship with the automotive industry at the annual Jeep Fest, which in 2019 drew more than 70,000 people from 32 states for a parade and three days of Jeep-themed events.

Having grown up along the Maumee River, Toledo continues to identify strongly with its riverfront, which still supports domestic and international cargo operations. The City has invested significantly in renewing its connection to the river. Recently renovated Promenade Park has become a popular waterfront venue for outdoor events and concerts. It will soon have a complement across the river in the Glass City Metropark. In late 2019, Metroparks Toledo awarded an \$8 million contract for construction of the first phase of the 30-acre green space. The launch of The Glass City Metropark marks a big step in the larger Glass City Riverwalk plan backed by ConneCToledo. That plan, born from the Downtown Toledo Master Plan, aims to activate the waterfront up and down the river, create a valuable community and regional amenity, and increase recreational opportunities and open space along the water for residents and visitors alike.

Close to 10% of all citywide hotel rooms are located downtown, speaking to its significance as a destination for visitors. That said, there are only 2 hotels, with 535 rooms, in downtown, among the lowest counts of the downtowns in the study.

 Hotels		
	DOWNTOWN	CITY
HOTELS	2	52
HOTEL ROOMS	535	5,598
VISITORS	3,000,000	n/a

Source: Destination Toledo Convention & Visitors Bureau (2019)

## Downtown Destinations



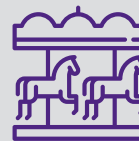
20

HISTORIC STRUCTURES



2

MUSEUMS



4

PLAZAS / SQUARES / AMPHITHEATERS



9

PARKS



57

PUBLIC ART INSTALLATIONS

Source: National Register of Historic Places (2019); Metroparks Toledo Park Inventory (2017); Lucas County (2017); ConneCToledo (2019)

# 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 noted earlier, the regional economy took a major hit during the Great Recession and still hasn't fully recovered. As downtown continues to rebuild employment numbers, encouraging a variety of industry sectors can help weather future shocks to any one sector. Strong growth in the number of residents with bachelor's and advanced degrees also means that more residents stand better equipped to handle changing economic conditions.

## Downtown Community Resources



1

LIBRARY



3

RECREATION AND  
COMMUNITY  
CENTERS

12

RELIGIOUS  
INSTITUTIONS

9

PARKS AND  
NATURAL  
AREAS

3

POSTSECONDARY  
INSTITUTIONS

7

PRIMARY AND  
SECONDARY  
SCHOOLS

Source: Toledo-Lucas County Public Library (2019); Metroparks Toledo Park Inventory (2017); ConnecToledo (2019)



**Social Resilience**

Downtowns function as hubs for social resilience. Their dense nature gives a diverse mix of residents and employees access to a multitude of community resources in a small area. Nine parks and natural areas, the main branch of the newly renovated Toledo Lucas County Public Library, a recreation center and 12 religious institutions together give residents, employees, and visitors multiple places to meet, learn, and participate in civic life.

Access to these resources plays a critical role in boosting social resilience, particularly for low-income residents. About 1,700 residents, or 45% of the downtown population, live in poverty. This high proportion suggests that a large group of residents rely on these resources. Typically, residents of downtowns with good access to resources have a higher life expectancy than the population citywide. As well, fewer residents of downtowns typically report being physically inactive. Life expectancy for downtown residents in Toledo, however, falls nearly five years below the regional average, and their rate of physical inactivity is four percent higher.

Despite the prevalence of lower-income households, only 19% of renter households pay more than 30% of income toward housing. This number—surprisingly low for an urban place—indicates that downtown remains largely affordable for those who live there. A high level of subsidized housing units—nearly one third of all housing—has helped keep downtown’s housing affordable. Maintaining affordability so that housing remains an option for households at all income levels will strengthen the community’s social fabric.



**Downtown Residents Commuting Patterns\***

	Downtown	City	Region
<b>BIKE</b> 	0%	0%	0%
<b>TRANSIT</b> 	7%	3%	1%
<b>CAR POOL</b> 	6%	9%	8%
<b>WALK</b> 	17%	3%	3%
<b>DRIVE ALONE</b> 	69%	84%	87%

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

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

**Social Resilience**



	DOWNTOWN	CITY
RESIDENTS IN POVERTY	1,684	72K
RENT-BURDENED RESIDENTS	711	27K
AVERAGE LIFE EXPECTANCY (CBD)	72.1	n/a
NO LEISURE-TIME PHYSICAL ACTIVITY	37%	33%

Source: American Community Survey 5-Year Estimates (2013-2017); CDC (2018)

## Mobility Options

	DOWNTOWN	CITY	REGION
BIKESHARE STATIONS	17	n/a	n/a
DOCKED BIKES	75	75	75
SCOOTERS	0	50	50
TOTAL TRANSIT STOPS INCLUDING RAIL AND BUS	84	2,183	2,441

Source: ToleGO App (2019); Lime Scooters (2019); Toledo Area Regional Transit Authority (2019)

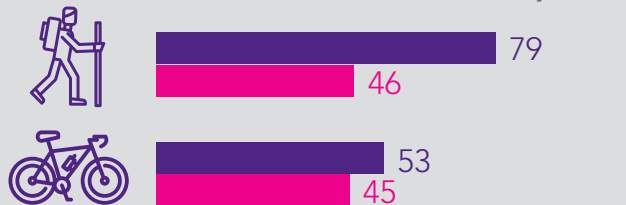
## Environmental Resilience



	DOWNTOWN	CITY	REGION
ACRES OF OPEN SPACE	24	3K	50K
% OF LAND FOR OPEN SPACE	3%	6%	6%
ANNUAL GHG EMISSIONS PER HOUSEHOLD (IN TONS)	4.4	7.5	8.6

Source: Metroparks Toledo Park Inventory (2017); Center for Neighborhood Technology (2017)

## Walk, Bike and Transit Scores



Source: Walk Score (2019)

## Environmental Resilience

Downtown ranks as much more walkable than the city at large, making downtown households less reliant on vehicles to get where they need to go. Partially as a result, an average downtown household produces three fewer tons of CO2 annually than an average city household (or 41% less) and four fewer tons than an average regional household (49% less). Downtown has also laid the groundwork for increasing its supply of open space and parks. The Glass City Riverwalk, described in the Identity section, represents the first step in a wider plan to bring investment to the banks of the Maumee River with the aim of creating a green community amenity.

Downtown’s Walk Score and Bike Score fall on the lower end of the scale for an urban place, but as residential density increases and it becomes easier for people to run daily errands without needing a car, these scores will improve. Car dependency has gotten worse: Since 2000, the number of downtown residents not driving alone to work has dropped 20%, and the number driving alone has doubled. Despite those disappointing trends, downtown still does better than the city overall, with 15% fewer residents driving alone to work than residents citywide.

Toledo has taken steps to reduce its car dependence in recent years. The City’s Division of Engineering Services commissioned a study to assess the state of downtown’s transportation systems and highlight opportunities for and challenges to creation of a safe, efficient, and equitable mobility network. In public meetings the planning team gathered input on what the public would like to see in downtown. The plan calls for a complete overhaul of Summit Street, downtown’s signature thoroughfare, to make it more pedestrian-friendly. The redesign will add on-street parking, new lighting, landscaping, and a wider median. In 2019, the Toledo Area Regional Transit Authority (TARTA) spent \$2.15M to build a new transit center on the northern edge of downtown.<sup>11</sup> Additionally, the City of Toledo Bike Plan, published in 2016, calls for investing \$32 million to build more than 100 miles of bicycle infrastructure across the city, with several trails crossing through downtown. These actions and projects demonstrate a strong will to invest in and improve alternate transportation options and encourage more sustainable modes of transportation.

# Downtown Profile | Summary

Downtown Toledo has seen major improvements over the last two decades and looks poised to grow even stronger. Downtown's strength lies in its vibrancy—specifically its diverse entertainment and cultural offerings. The new sports stadiums have injected new life into downtown, with the increased traffic they've drawn fueling a blossoming restaurant and bar scene. The data shows that downtown has begun to attract residents with higher incomes, an encouraging sign of potential growth and economic vitality to come. Additionally, ProMedica's strong vote of confidence—the decision to bring 1,000 employees to a new riverfront headquarters—may signal a wider interest among businesses in locating offices downtown.

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

The accompanying tables show how downtown compares to its peers in the same tier, and to citywide averages for tier cities. To see 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.\*

## Toledo's downtown falls in the "emerging" tier.

Emerging downtowns don't yet have the high citywide significance in jobs and residents found in other downtowns, and they have relatively lower density. Emerging downtowns have lots of potential; typically, property value per square mile remains low relative to other urban places, allowing developers to see greater return on their investment dollars. Similarly, lower rental costs make these downtowns attractive to small businesses and creators/makers.

## Emerging Downtowns

DURHAM	HUNTSVILLE	TAMPA
EL PASO	LANCASTER	TOLEDO
GRAND RAPIDS	OKLAHOMA CITY	TUCSON
GREENSBORO	SAN ANTONIO	WICHITA
HOLLYWOOD	SPARTANBURG	

Average of **2%** of the citywide land area, with an average assessed value of **\$1.6 billion** (5.8% of citywide assessed value). Comparison of other metrics:

	DOWNTOWN TOLEDO	EMERGING DOWNTOWNS
CITYWIDE POPULATION	1.3%	3.1%
MILLENNIALS LIVING CITYWIDE	1.9%	4.5%

## RESIDENTIAL



	DOWNTOWN TOLEDO	EMERGING DOWNTOWNS	EMERGING CITIES
<b>GROWTH</b> AVG. 2000 – 2017	12%	17%	16%
<b>DENSITY</b> RESIDENTS / ACRE	5	7.5	4.5
<b>DIVERSITY INDEX</b>	56	64	70
<b>MEDIAN HOUSEHOLD INCOME</b>	\$17K	\$36K	\$47K



## EMPLOYMENT

	DOWNTOWN TOLEDO	EMERGING DOWNTOWNS
CITYWIDE JOBS	18%	15%
CITYWIDE KNOWLEDGE JOBS	18%	18%
CITYWIDE CREATIVE JOBS	11%	18%
RESIDENTS HOLDING A BACHELOR'S DEGREE OR HIGHER	25%	37%

\*The compendium report is available at the IDA website, [downtown.org](http://downtown.org).



DOWNTOWN SUSTAINABLE COMMUTE



	DOWNTOWN TOLEDO	EMERGING DOWNTOWNS	EMERGING CITIES
	16%	29%	17%



	DOWNTOWN TOLEDO	EMERGING DOWNTOWNS
% CITYWIDE RETAIL SALES	2%	6%
RETAIL SALES PER SQUARE MILE	\$73M	\$130M*

\*This figure excludes retail sales per square mile for Hollywood and San Antonio, which are outliers for emerging downtowns.



	DOWNTOWN TOLEDO	EMERGING DOWNTOWNS
HOTELS	2	12
HOTEL ROOMS	535	1,439*

\*This figure excludes hotel rooms for San Antonio, which is an outlier for emerging downtowns.

WALK SCORE



	DOWNTOWN TOLEDO	EMERGING DOWNTOWNS	EMERGING CITIES
	79	81	38

BIKE SCORE



	53	74	43
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TRANSIT SCORE



	N/A	44	22
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Set against the citywide decline in population, both population growth since 2000 and increasing market demand for downtown housing both look significant. The most impressive components of downtown—the richness of its arts community and the energy of sports fans—have proved difficult to quantify and benchmark to other places. Based on the data available, we know that downtown punches above its weight in art and history, with more public art and historic structures than more than half of the cities participating in the study. Two professional sports teams vault downtown into a three-way tie—with Dallas and San Antonio—for the fourth-highest number of resident teams. Downtown also generates a greater share of citywide tax revenue than any other downtown in the “emerging” tier except Tampa, which covers a larger proportion of citywide land area.

Plenty of room for improvement remains. Within the study, downtown Toledo has the second-lowest median household income and seventh-lowest population density. It also has the second-lowest number of hotels and third-lowest number of hotel rooms. Retail sales per square miles ranked as the third-lowest in the study, and even though the proportion of educated residents has risen, downtown still has one of the smallest shares of residents holding a bachelor’s degree or higher in the study.

Finally, on sustainable transportation, downtown’s Walk Score holds up well against other “emerging” downtowns, but an above-average portion of commuters drive to work alone. Additional investment in alternative transportation options will enable downtown to become a more vibrant and resilient place.



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.

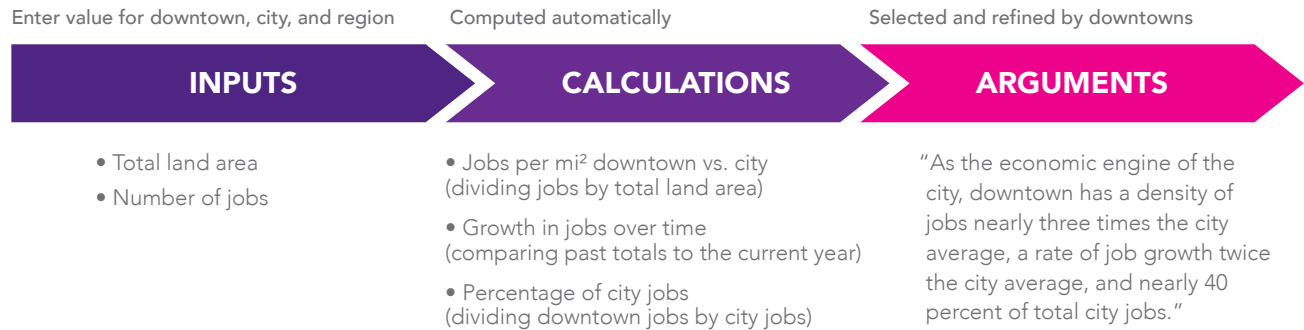
### CALCULATIONS AND ANALYSIS

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.”<sup>1</sup>



**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."<sup>2</sup>



#### 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.<sup>3</sup>

### 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.<sup>4</sup>

### 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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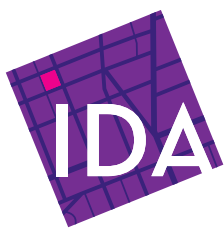
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