The Value of U.S. Downtowns and Center Cities

CALCULATING THE VALUE OF DOWNTOWN BIRMINGHAM, ALABAMA
A 2021 IDA STUDY

A 2021 PUBLICATION CREATED BY
THE INTERNATIONAL DOWNTOWN ASSOCIATION

IDA
INSPIRED LEADERS SHAPING CITIES

ABOUT IDA

INSPIRED LEADERS
SHAPING CITIES

IDA

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

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THE VALUE OF U.S. DOWNTOWNS AND CENTER CITIES

Stantec's Urban Places

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

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

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IDA would like to thank the following individuals for their efforts on the 2021 edition of this project:

Albuquerque
Karen Iverson
Jonathan Teeters

Birmingham
David Fleming
Rob Buddo

Evansville
Josh Armstrong
Adam Trinkel

Little Rock
Gabe Holmstrom
Caroline Brown
Ellen Lampe
Chellie Longstreth

Los Angeles
Suzanne Holley
Cole Judge
Elan Shore

West Palm Beach
Raphael Clemente
Shelly Williams

The REV Birmingham team would like to thank presenting sponsor PNC for their support of the Birmingham edition of the *Value of U.S. Downtowns.*


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CONTENTS

SECTION ONE

PROJECT OVERVIEW

1

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 together in ways that build the economy, opportunity, community and identity. Downtowns across the U.S. experienced unprecedented change in 2020 and 2021, which were fundamentally impacted by the COVID-19 pandemic. In some ways the pandemic highlighted the importance of vibrant urban places. The prolonged absences from our favorite places and activities in some measure deepened our appreciation for them. As the pandemic recedes, downtowns will once again be focal points for commerce and activity.

Typically, despite a relatively small share of a city's overall geography, a downtown delivers significant economic and community benefits across both city and region. Downtown serves as the epicenter of commerce, capital investment, diversity, public discourse, socialization, knowledge and innovation. It provides social benefits through access to community spaces and public institutions. It acts as a hub for employment, civic engagement, arts and culture, historical heritage, local identity, and financial impact. In short, the proximity and density that downtown and center cities create drive the city around them to thrive.

While proximity and density were challenged in the short-term due to the pandemic, the urgency of responses in 2020 and 2021 also presented new opportunities to adapt downtowns and center cities to a more human-centric future. The success of open streets and outdoor dining in cities large and small have started to lead to permanent programs that prioritize people over cars. Stronger public-private partnerships have streamlined regulations for everything from new business permits to cocktails-to-go. Responding to the racial awakening of 2020, many organizations are working to address bias internally, and in their public programming. Several urban place management organizations are creating programs to specifically support minority entrepreneurs so that downtown better represents the community.

Longer-term, the effects of the pandemic on urban cores are still emerging. The permanence of remote work remains an open question. Richard Florida cites work by economist Nick Bloom that estimates that ultimately, remote work will account for one-fifth of all work-days, compared with just 5% pre-pandemic.[1] This shift will decrease the daytime population in urban centers and affect consumer spending downtown, but it also presents an opportunity to pare down auto-centric infrastructure and create justification for districts to evolve beyond a 9 to 5 worker-focused dynamic to more complete live, work and play communities. The concept of the 15-minute city, the idea that everyone living in a city should have access to essential urban services within a 15 minute walk or bike ride, has gained in popularity in the past year and reinforces the value of the mixed-use nature of many of our downtowns and center cities.[2]

In the coming years the ways we use and evaluate downtowns and center cities may shift, but downtowns' resilience across economic, social, and environmental measures positions them well to lead citywide recovery. Downtowns have emerged from past crises even stronger, and there's no reason to think they won't this time.

About the Value of Downtowns Study

Building on IDA's unique industry-wide perspective and expertise, this study quantifies the value of U.S. downtowns and center cities across more than 150 metrics organized under five core value principles, with a focus on how downtowns contribute to the city and region around them. The Value of U.S. Downtowns and Center Cities study is a partnership between IDA and local urban place management organization (UPMO). UPMOs have invaluable insights into the areas they manage and have the relationships that help them unlock essential data sources for this 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 from local decision makers. The primary project goals are to:

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 with Stantec's Urban Places group and the first cohort of 13 UPMOs to develop a methodology for compiling and evaluating data from those 13 downtowns. In 2021, our analysis has expanded to include 43 downtowns and center cities across the U.S.

The analysis focuses on how downtown provides value in the five organizing principles of economy, inclusion, vibrancy, identity, and resilience. IDA and our UPMO partners work together to collect hundreds of individual data points, including historic and current data, and three geographic levels (study area, city, and MSA/county). In addition, for employment data we collect three different jobs totals (primary, all jobs, and all private) for all years between 2002 and 2017 to show more nuanced employment trends over time. In total, we utilize more than 8,400 individual pieces of data for each participating downtown, and our downtown database now contains around 310,000 datapoints. The demographic and jobs data included in the study predates the COVID-19 pandemic, but some real estate, tax and assessment data include 2020 and 2021 figures.

Urban Place Management Organizations

IDA's members are urban place management organizations that manage growing districts to create prosperous city centers, commercial neighborhoods and livable urban places for all—from residents to visitors to business owners. These UPMOs shape and activate dynamic downtowns, city centers and neighborhood districts.

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 focused attention beyond the services municipal governments alone can provide. These private-sector stakeholders come together to form and fund nonprofit management associations that deliver key services and activities within the boundaries of their districts. UPMOs typically operate as business improvement districts (BIDs), business improvement areas (BIAs), partnerships or alliances.

Value of Downtowns Participants

ECONOMY

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 their only making up a small fraction of the city's or region's land area. Downtowns support high percentages of jobs across many different industries and skill levels. Because of a relatively high density of economic activity, investment in the center city provides a greater return per dollar for both public and private sectors than investments elsewhere.

INCLUSION

As the literal and figurative heart of their cities, downtowns represent and 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 from across all ages. 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 all to opportunity, essential services, culture, recreation, entertainment and civic activities.

VIBRANCY

The ability of vibrant places to attract visitors and new residents, as well as a regionwide consumer base, creates value. Vibrancy means 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 their cities, downtowns typically attract a large share of citywide visitors and account for a large share of citywide hotels and hotel rooms.

IDENTITY

Downtowns and center cities often serve as iconic symbols of their cities, creating a strong sense of place that enhances local pride. The authentic cultural offerings in downtown enhance its character, heritage, and beauty, and create an environment that other parts of the city can't easily replicate. Combining community history and personal memory, a downtown's cultural value plays a central role in preserving and promoting regional 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

Downtowns and center cities play a crucial role in building stability, sustainability, and prosperity for the city and region. Their diversity, concentration of economic activity, and density of services better equip them to adapt to economic and social shocks than more homogenous communities. They can play a key role in advancing regional resilience, particularly in the wake of economic and environmental shocks, which often disproportionately affect less economically and socially dynamic areas.

Methodology Overview[i]

The first step to this study is to identify the right boundaries that capture a downtown district. Geographic parameters often vary across data sources and may not align with a UPMO's jurisdiction. This study has adopted a definition of the commercial downtown that moves beyond the boundaries of a development authority or a 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."[3] IDA worked with each UPMO to identify the boundaries of their downtown for this project, giving priority to 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 relies on data that could be collected efficiently and uniformly for a downtown, its city, and its region. IDA collects data from multiple national databases, such as the U.S. Census, LEHD, and ESRI. In addition, IDA gives each participating UPMO a list of metrics to collect from local sources like county assessors or commercial real estate brokers. IDA then analyzes the data to identify study area trends and benchmark the area against the city, the region, and other downtowns in the study.

The analysis includes meaningful qualitative observations to acknowledge unique features or add nuance and context to trends revealed in the data. As an example, universities often sit on the edge of a downtown study area. Even if not technically inside downtown, the university's students typically represent a large user and consumer base for downtown and the analysis describes how the student presence influences the downtown environment.

The analytical focus of the report is to make and support value statements about downtown by comparing it to the city, identifying its growth trends over time, and illustrating its density. For instance, data patterns revealed this for 2017 employment totals in downtown Seattle:

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, as are 58% of citywide knowledge jobs. Overall, employment has increased 14% since 2010, outpacing both the city and region. In addition, the number of knowledge jobs grew 28% during that period. Each square mile supports 85,924 workers on average, more than ten times the average job density citywide.

i Refer to the appendix for the full methodology.

Known Limits to this Study

While this study aims to provide a comprehensive quantification of the value of downtowns, there are still several limitations to our approach. Not all local sources consistently collect the same data, or collects it in the same way, which hinders our ability to make comparisons between downtowns. In some cases, the data we ask for simply does not exist or has not been collected on the relatively small scale of census tracts or downtown sub-area. This makes it challenging to rely on local data for analysis and can result in some missing pieces in our narrative.

Our most recent data also comes predominantly from the 2019 American Community Survey (ACS), the 2018 Longitudinal Employer-Household Dynamics (LEHD) On the Map tool, and ESRI Business Analyst. Due to the lag in data availability, some metrics may not align with more recent data from local downtown, municipal, or proprietary sources. This will be especially true in coming years as change in employment during COVID-19 will not be observed in our data sources for several years.

Finally, citywide context plays a large role in the analysis. Significant variance in overall city size (from Spartanburg's 20 square miles to Oklahoma City's 606) can skew comparisons of the proportion of citywide jobs or population in different districts. However, since downtowns operate within the context of their city, understanding the proportion of jobs, residents, and other metrics as a percentage of their cities still provides an important perspective on a downtown's contribution to its city and region.

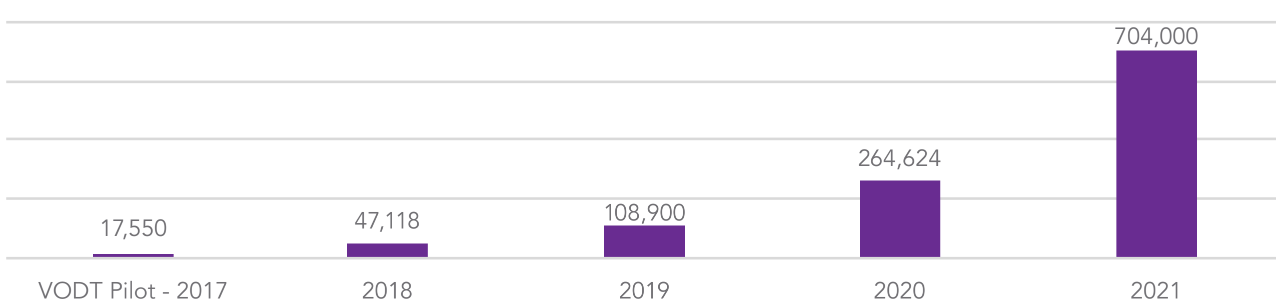
Improvements Over Previous Years and Areas for Future Research

This year has seen yet another evolution of the Value of Downtowns product featuring new tools, more data, and new methods of analysis. Our Value of Downtowns database now integrates with Tableau, a data visualization software. With this software, we are able to make connections and draw comparisons between downtowns in a far more nuanced and intuitive way. This report includes some of these new visualizations. For example, charts like households by income over time, or housing units by gross rent over time reveal trends and relationships that we previously were not able to analyze.

The Value of Downtowns database has grown exponentially over past iterations, particularly as this year we have included demographic and jobs data for all years available since 2000, rather than only collecting four benchmark data years.

This level of additional data and capability has increased our ability to understand comparisons between downtowns and center cities. This is reflected within this report, as well as with the launch of IDA's newest research offering, the Value of Downtowns: Comparisons. The Comparisons study focuses on understanding how a given downtown's performance stacks up to its closest peers, and evaluates a smaller number of metrics than this Value of Downtowns study.

Value of Downtowns Total Datapoints




ALABAMA

SECTION TWO

DOWNTOWN PROFILE

2

Downtown Profile | Overview

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

Study Area

DOWNTOWN PARTNERS

REV Birmingham and City Center District Management Corporation

CITY

Birmingham, AL

Residential Population

	City Center	City	Region
Population	10,602	212,297	1,085,330
Residential Share	n/a	5.0%	1.0%
Residents/Sq. Mile	3,293	1,453	206
Growth 2010-2019	38%	-2%	-3%
Growth 2000-2019	15%	-13%	18%

Source: U.S. Decennial Census (2000); American Community Survey 5-Year Estimates (2015–2019)

While the long-term impact of the COVID-19 pandemic remains to be seen, in the short term the significance of downtown and how it intertwines with the rest of the city and region has never been more apparent. Many of the hardest-hit sectors—retail, food, entertainment, tourism, arts and culture, and nonprofits—rank among downtown's most compelling businesses. Their return to business will mark the start of full recovery and accelerate the return of a strong economy citywide. (Note: All demographic data used to produce this report predates the COVID-19 pandemic.)

Downtown Birmingham is the heart and soul of its region. At 3.2 square miles, it occupies only 2.2% of the city's land area yet delivers outsized benefits. The region's largest tax generator, downtown acts as an economic engine, funding much of the investment by the City of Birmingham in its 99 neighborhoods and investment by Jefferson County inside and outside the city. A cultural center for all its citizens, downtown brings together churches and entertainment venues, parks and playgrounds, restaurants, and shops. It brings college graduates back home and attracts investment of all kinds to the city.

Across multiple categories of data, downtown drives regional success. In a period when citywide population has declined, downtown has grown significantly; today it houses nearly 11,000 residents, about 5% of the city's population. It delivers even stronger economic benefits, with 37% of citywide jobs. Additional development will continue to densify and bring greater vibrancy to downtown, building on relatively new assets like Railroad Park.

The 2019 population of 10,600 capped a decade of strong growth between 2010 and 2019. The resident count rose by 38% during that period, in contrast to a citywide decline of 2%. Downtown's steady growth helped stave off a steeper decline citywide: if population had remained flat during the period, citywide population would have fallen by 3.2%. Downtown's density, more than double the city's, remains low compared to other U.S. downtowns and sits in the middle of the pack for "emerging" downtowns studied for the Value of Downtowns analysis. The 2019 City Center Master Plan argues that downtown's above-average size gives it a lower density than other comparable downtowns.

Employment Population 2018

	City Center	City	Region
Primary Jobs	63,112	171,283	476,061
Share of Jobs	n/a	37%	13%
Employees per square mile	19,600	1,173	90
Primary Jobs Growth 2010-2018	0.4%	4%	10%
Private Jobs Growth 2010-2018	2%	5%	13%

Source: LEHD On the Map (2018).

Newly-released data from the 2020 U.S. Census reveal that City Center continued to grow from 2019 to 2020. The study area in the 2020 census does not map exactly to the boundaries used for this study, due to changes in tract geographies. Nevertheless, comparing census tracts 27 and 45 between 2019 and 2020 shows that they grew 14%, from 8,807 residents to 10,070.

With more than 63,000 primary jobs, downtown serves as an economic center for the city. Downtown has 37% of citywide jobs and 13% of the region's jobs. The jobs count has remained fairly stable since 2010, although it has grown modestly citywide, by 4%, and by 10% across the region. Private jobs figures show a similar trend, with minimal growth downtown and more significant growth in the city and region.

Inventory

	City Center	Share of City	Per Square Mile	Growth 2010-2019
OFFICE (SF)	18.3M	39%	5.7M	1%
RETAIL (SF)	5.6M	51%	1.8M	n/a
RESIDENTIAL UNITS	7,311	13% of region	2,270	14%
HOTEL (ROOMS)	2,897	38%	900	n/a

Source: CoStar (2021), STAR Report (2018)

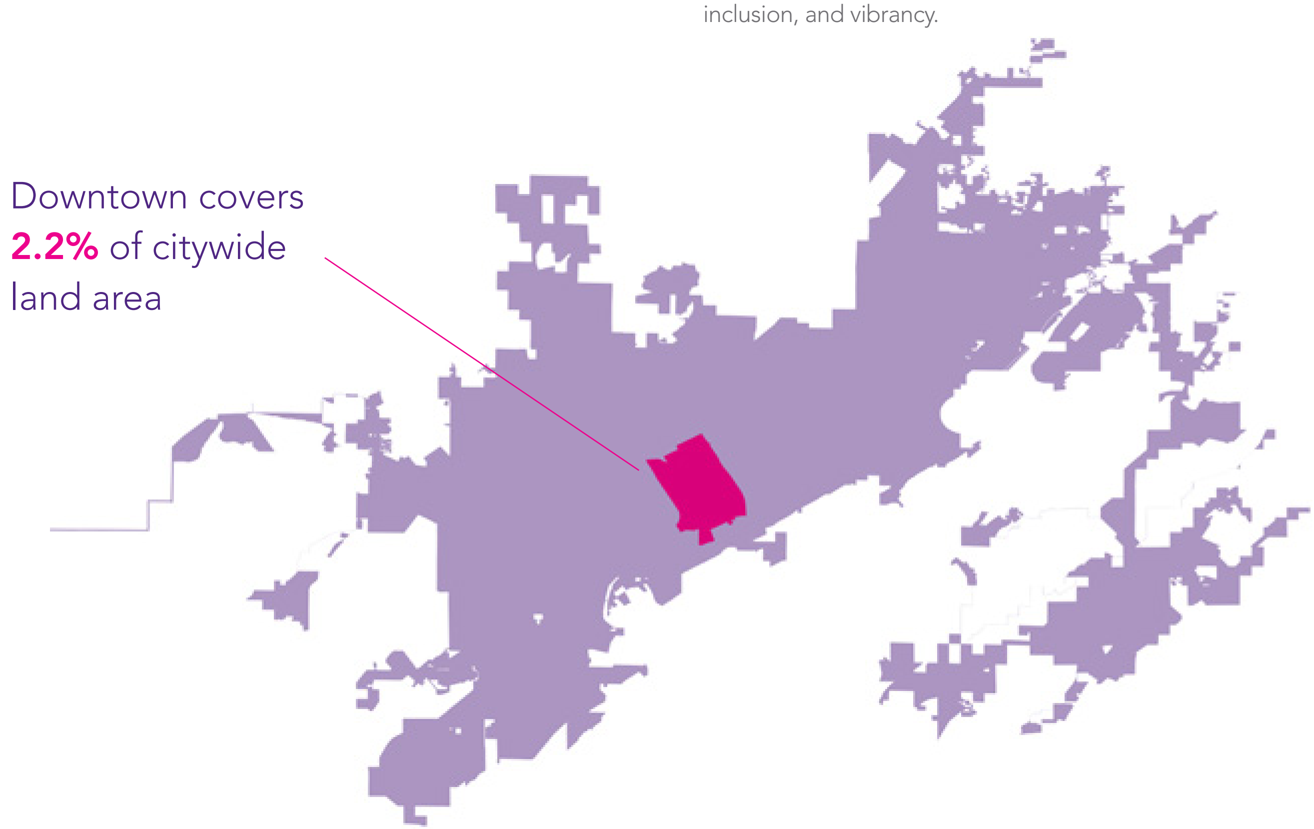
Downtown serves as a hub for a variety of commercial uses. As the 2019 City Center Master Plan notes, “The value is certainly measurable in economic terms where the IDA estimated that downtowns ‘deliver an average of 16% of the citywide property tax revenue, 42% of the hotel tax revenue, and 12% of the sales tax revenue. Downtowns contain 11% of the city’s assessed land value, 28% of total employment, and 36% of the city’s office space.’” Downtown holds nearly 40% of Birmingham’s office space and hotel rooms and 37% of its jobs. Office space, however, hasn’t grown much since 2010, suggesting some stagnation in downtown offerings. On the other hand, residential development has increased by 14% since 2010, rising to 7,300 units, with a robust pipeline of projects in the planning and construction stages.

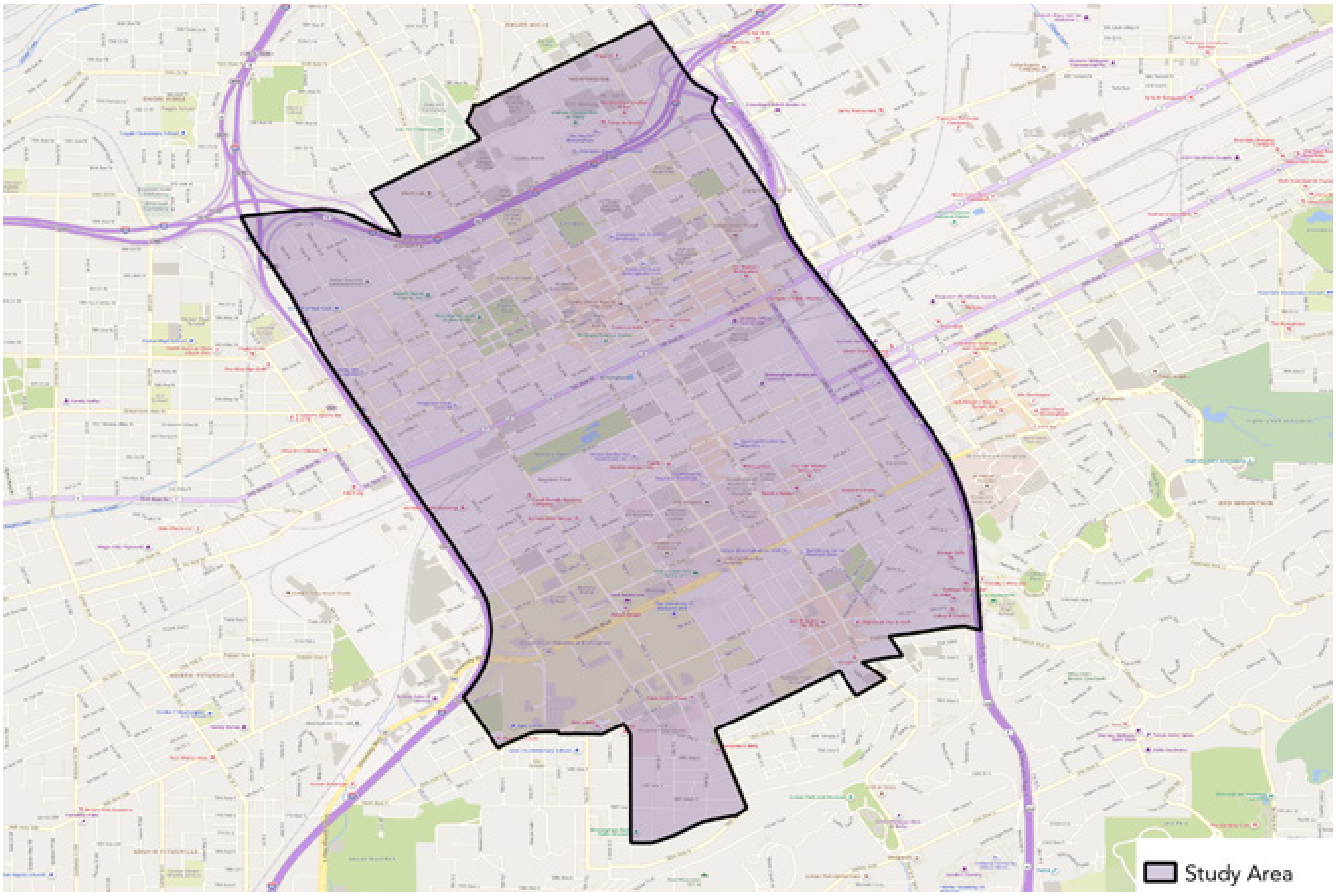
Downtown Study Area

The study area extends beyond the boundaries of the City Center Business Improvement District area, as geographic parameters vary across data sources and don’t typically align with boundaries designated by the local partner organization.

IDA recommended that the urban place management organizations participating in this study use the commonly understood definition of downtown and match boundaries to hard edges, roads, water, natural features or highways. IDA worked with each group in this analysis to align its study area with census tract boundaries for ease of incorporating publicly available data from the U.S. Census. The city referred to in this study is the City of Birmingham, and the region is the Birmingham-Hoover Metropolitan Statistical Area, which consists of six counties (Bibb, Blount, Chilton, Jefferson, St. Clair, and Shelby).

This study let IDA, REV Birmingham, and the City Center District Management Corporation take a deep dive into the effects of downtown on the metro area, region, and state. This data forms a baseline against which REV Birmingham and City Center District Management Corporation will compare future data to track growth, changes, and trends. In addition, IDA and REV will add downtown Birmingham to the IDA’s Vitality Index, an interactive online benchmarking tool that compares a downtown to its peers through the lenses of economy, inclusion, and vibrancy.




Study Area

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. Urban centers across the U.S. were the first areas to recover from the Great Recession, and although the impact of the 2020 COVID-19 pandemic still reverberates, prior analysis of the role of downtowns and center cities highlights their unique ability to absorb and recover from economic shocks and stresses.

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

With 37% of citywide jobs, downtown serves as a distinct jobs center for Birmingham. Its 19,600 jobs per square mile give it a job density 17 times greater than the city overall. Downtown's largest sectors power the city's largest sectors, with 39% of citywide health care and social assistance jobs, 50% of citywide finance and insurance jobs, and 67% of citywide educational service jobs. Even across the region, downtown accounts for 22% of jobs in health care and social assistance, 17% of jobs in finance and insurance, and 23% of jobs in educational services. The concentration of these "knowledge industry" jobs underscores downtown's importance as a jobs center in industries growing fastest nationwide.

Health care and social assistance (15,500 jobs), public administration (9,300 jobs), and educational services (7,900 jobs) rank as the largest industries downtown and together account for more than half of all downtown jobs. While finance and insurance jobs remain the fourth-largest sector for jobs, and half of citywide jobs in this sector are

Downtown Employment

37%
CITY'S JOBS

27%
CITY'S PRIVATE JOBS

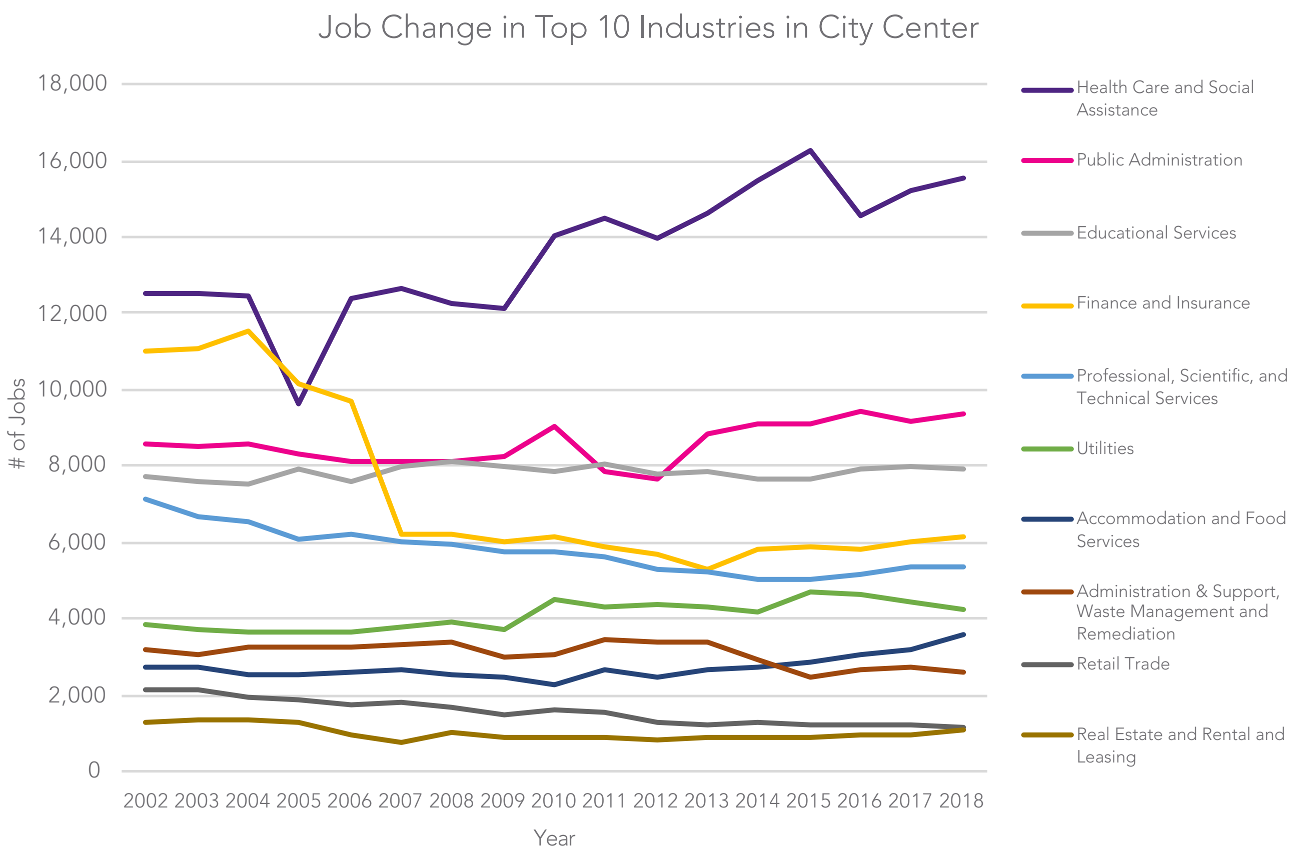
43%
CITY'S CREATIVE JOBS

39%
CITY'S HEALTH CARE/ SOCIAL ASSISTANCE JOBS

42%
CITY'S KNOWLEDGE INDUSTRY JOBS

Source: LEHD On the Map (2018)

downtown, the industry declined precipitously around the time of the Great Recession, dropping from downtown's second-largest industry, and its jobs have not returned. Accommodation and food services represents the fastest-growing sector downtown, with a 60% increase in jobs between 2010 and 2018. In the 12 months between 2017 and 2018, the most recent year for data, accommodation and food services jobs grew by 12%, while overall numbers rose only minimally.



Source: LEHD On the Map (2018)

Downtown houses some of the state's largest employers. The top three—the University of Alabama at Birmingham (UAB), the largest employer in Alabama; Regions Financial, Alabama's only Fortune 500 company; and Alabama Power—all call downtown home. They share the district with growing tech companies like Shipt and Landing; regional hubs for financial institutions like PNC, Synovus, and Wells Fargo; and a large number of governmental jobs, both federal and municipal.

Knowledge industries account for nearly half of downtown jobs, but the total of these jobs has declined slightly since 2010. An 11% increase in health care jobs helped buoy the category—particularly impressive given that the growth came atop a large base of 14,000 jobs in 2010. That total reached 15,500 in 2018. The growth rate, however, closely matched growth in the city and region, suggesting that downtown just kept pace with city and regional trends.

Already reduced by bank mergers and consolidations, downtown's finance and insurance jobs took a deep hit in the Great Recession. While they have yet to recover, jobs in this sector grew by 13% citywide and 18% in the city and region. Management sector jobs downtown dropped dramatically after hitting a peak of 2,100 jobs in 2010; a steady decline cut the number to 700 in 2018. Finally, information sector jobs have experienced a slow decline since 2002, the earliest year for this data. From 1,500 jobs in 2010, the total dropped to only 800 in 2018—but this parallels a sharp decline in the city and region. Information jobs, just one sector of the knowledge industry, include jobs in publishing, broadcasting, telecommunications, and data processing. Bolstering knowledge industry jobs will play a key role in diversifying downtown's economy to emphasize the sectors most future-facing, well-paying, and attractive to a well-educated workforce.

Knowledge Industry Employment Growth 2010-2018

	Finance, Insurance, Real Estate and Rental and Leasing	Management of Companies and Enterprises	Professional, Scientific, and Technical Services	Information	Health Care and Social Assistance	Total Knowledge Job Change
City Center	2%	-66%	-7%	-47%	11%	-2%
City	13%	-9%	-9%	-22%	13%	7%
Region	18%	-3%	9%	-17%	14%	11%

Source: LEHD On the Map (2010 and 2018)

Small Businesses and Startups

Downtown has a concentration of small businesses (with fewer than 20 employees) similar to that of the city, and slightly less than the regional proportion. Small businesses play a critical role, generating new jobs, promoting innovation, and boosting competition; they account for almost half of U.S. economic activity.[1] Compared to the city and region, downtown has a similar proportion of younger businesses (fewer than three years old). Investments in the Innovation Depot and the surrounding Switch district have the potential to encourage more entrepreneurs to create new firms and jobs. With a concentration of vacant buildings and underused spaces, The Switch holds significant opportunity for developers as well as growing innovation/tech companies and the service and lifestyle businesses that support them. A collaborative Northwest Downtown Master Planning effort, now underway, will guide strategic growth in both The Switch and the neighboring Civil Rights District. It should be complete by the end of 2021.

Slightly more than one-third of downtown workers come from outside of Jefferson County. This underscores the importance of downtown's economy as a regional anchor, particularly for neighboring Shelby County, where 13% of downtown workers live.

On average, downtown workers earn more than workers citywide or regionwide. Almost 66% of downtown workers earn more than $3,333 per month, compared to 57% citywide and 50% in the region. According to data from the Census's Annual Business Survey, the aggregate annual payroll in two downtown ZIP codes, 35233 and 35203, accounts for 24% of Jefferson County's total payroll and 18% of the region's total payroll. In addition, the average annual wage in these two ZIP codes is $67,875, higher than the average wage in the county by $15,000.

Jobs by Firm Size

	City Center	City	Region
< 20 PEOPLE	11%	11%	16%
20-249 PEOPLE	21%	23%	23%
> 249 PEOPLE	68%	66%	61%

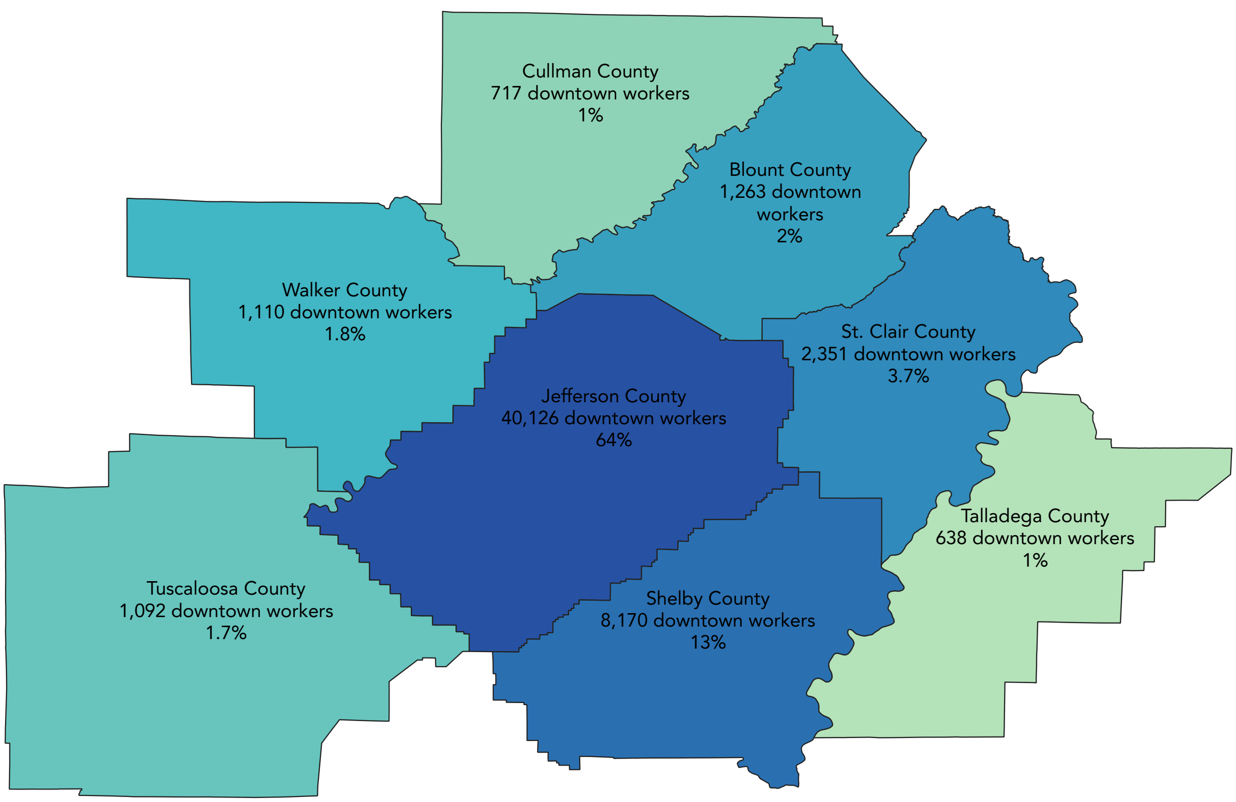
Source: LEHD On the Map (2017)

Jobs by Earnings

	City Center ZIP 35233 / 35203	County	Region
Downtown % of Total Annual Payroll	n/a	24%	18%
Average Employee Wage	$68k	$52k	$51k

Source: U.S. Census Annual Business Survey (2018)

Number of Regional Residents Who Work in City Center



Source: LEHD On the Map (2018)

Inclusion | Diversity, Affordability

Downtowns and center cities invite and welcome all residents, employees and visitors by providing access to jobs, housing, essential services, culture, recreation, entertainment, and participation in civic activities. A strong sense of inclusion and social cohesion keeps communities strong in times of crisis.

> "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**."[2]

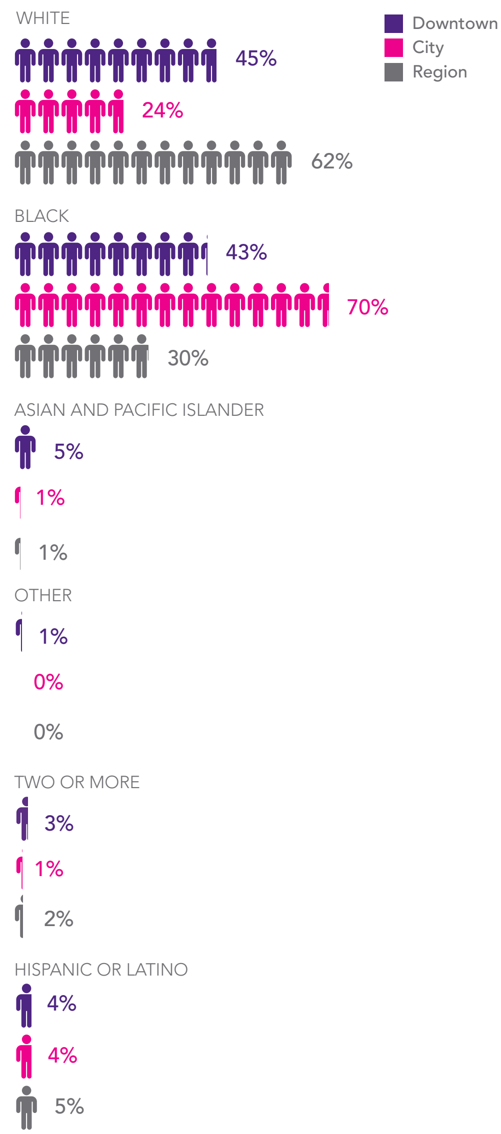
Benefits of Inclusion: Equity, Affordability, Civic Participation, Civic Purpose, Culture, Mobility, Accessibility, Tradition, Heritage, Services, Opportunity, Workforce Diversity

Racial Diversity

With a score of 60, downtown ranks higher on the Diversity Index than the city (46.5) does. This indicates a 60% chance that any two random residents within downtown identify as different races or ethnicities. Since 2009, the population has split fairly evenly between Black and White residents, a trend that continues today. The increase in both Black and White residents downtown suggests that a growing population and expanding residential options have not triggered widespread displacement. Beginning in 2013, data also shows steady growth in populations of racial groups that identify neither as White nor Black.

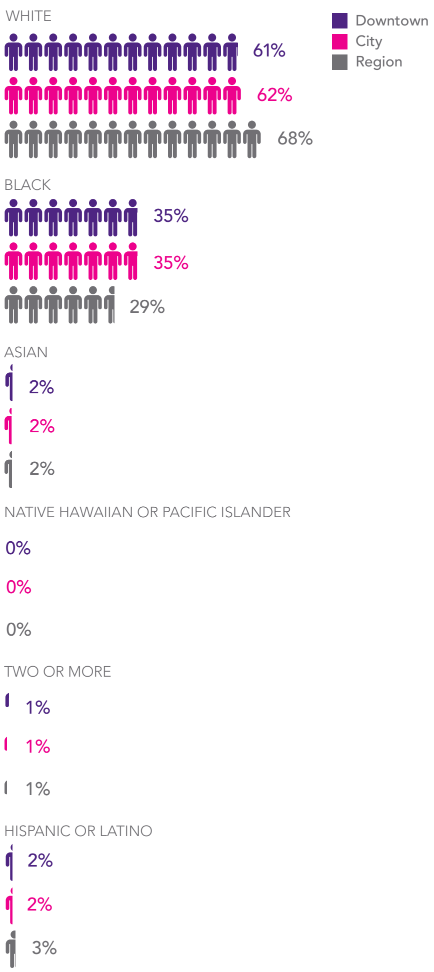
In contrast to the residential population, the racial demographics of workers looks nearly identical in downtown and across the city. About 60% of workers are White and 35% are Black. In addition, the vast majority of downtown workers commute from around the region. Only 3,000 people (roughly 5% of job holders) both live and work downtown.

Residents By Race

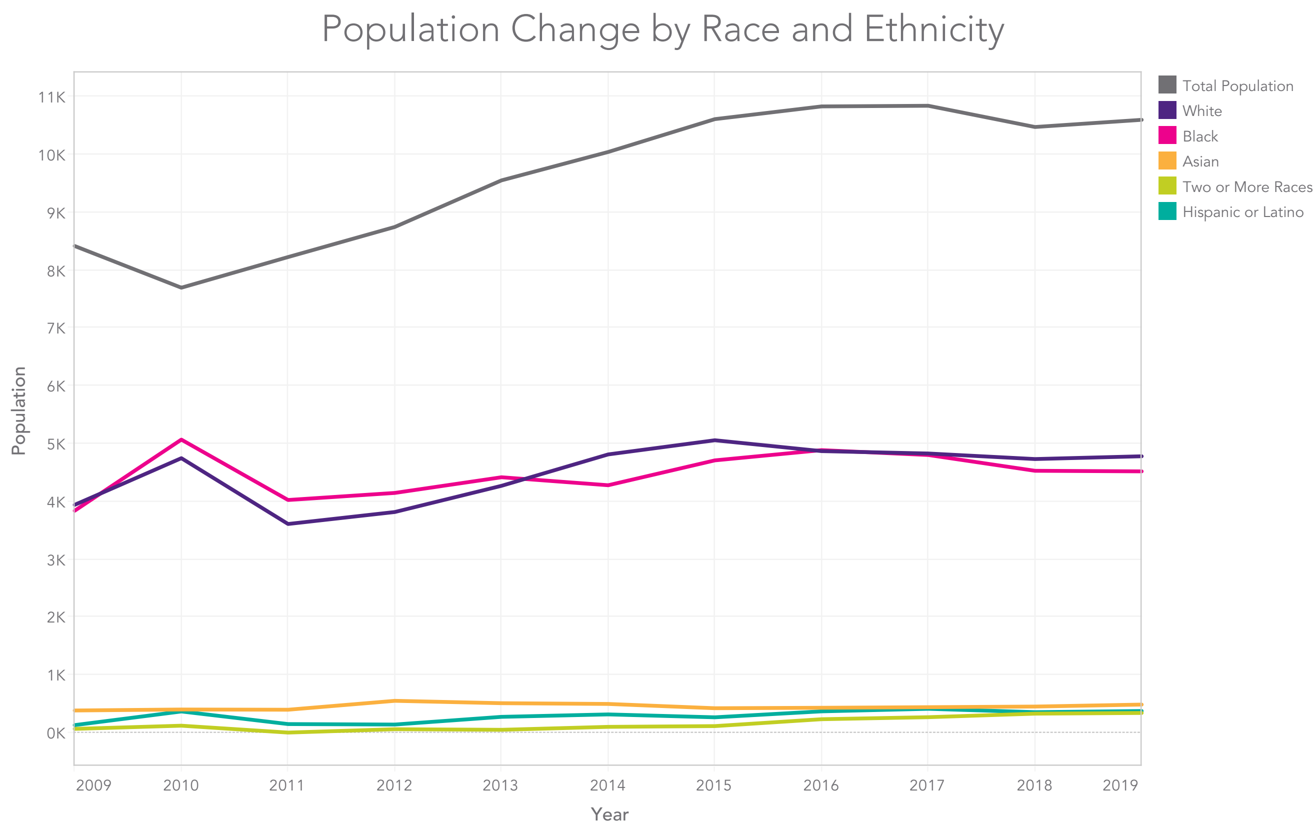


Source: American Community Survey 5-Year Estimates (2015–2019)

Employment By Race



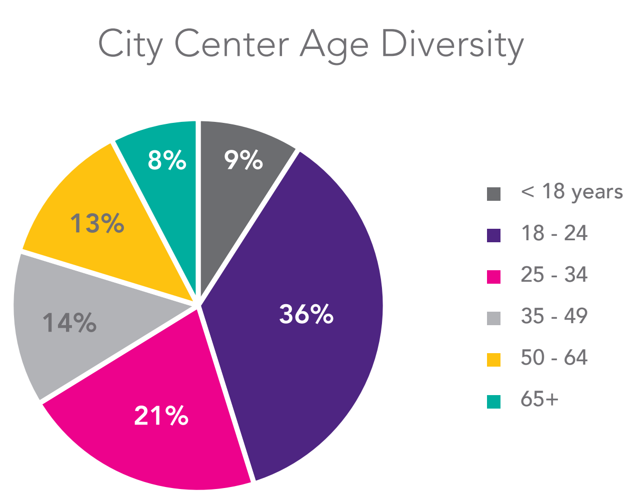
Source: LEHD On the Map (2018)



Source: American Community Survey 5-Year Estimates (2015–2019)

Age Diversity

Downtown skews young, with almost two-thirds of the population under 34. Residents aged 18–24 have propelled downtown's growth. Between 2009 and 2019, the number of residents in this age range grew by 50%, accounting for more than 3,800 residents downtown. Another fast-growing group, residents 50 to 64, also increased by 50% between 2009 and 2019. This age range may include empty nesters who still work and value living close to their jobs and to cultural amenities.

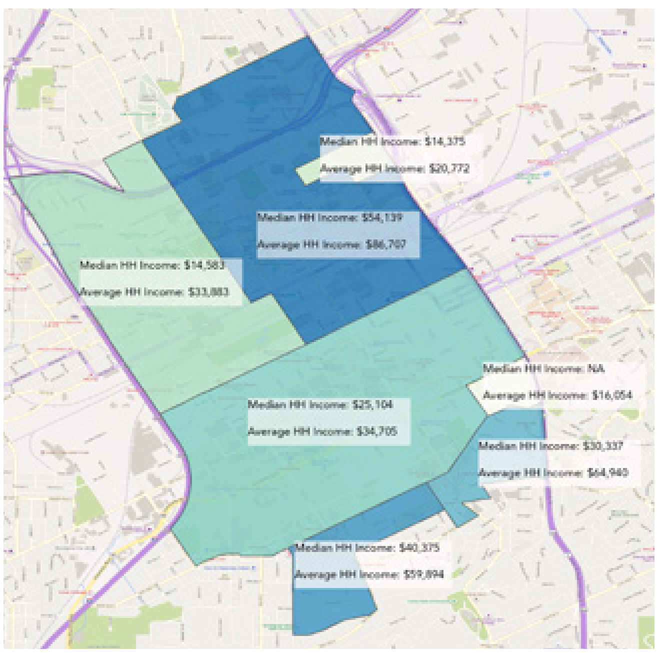


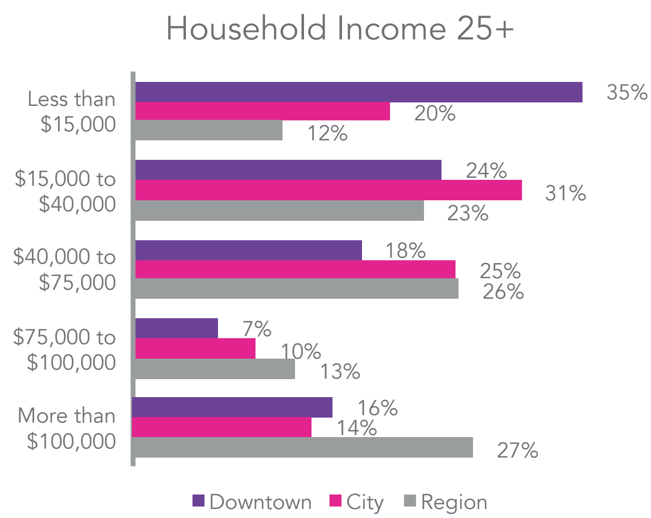
Source: American Community Survey 5-Year Estimates (2015–2019)

Socioeconomic Diversity

Slightly more than one-third of downtown residents have very limited incomes, earning less than $15,000 a year. These data cover residents 25 and older, a group that would typically exclude college students. Since many don't earn any income, they would skew the results. However, UAB's student population, which includes graduate students, averages 25.6 years old; students older than 25 account for nearly 35% of enrollment. The number of households in downtown earning less than $15,000 grew by 32% between 2009 and 2019, although this number peaked in 2015 and then began declining slowly. UAB's rapid enrollment growth—it has added nearly 6,000 students since 2009—likely contributed to the increase in low-income households. The large student population also pulls down downtown's median household income, $24,014, compared to the citywide median of $37,375.

The surprisingly low median household income for downtown looks even more curious in comparison to downtown's average income of $52,117. The apparent disparity reflects a concentration of wealthier residents in parts of downtown. Residents in the City Center core and Uptown have an average income of $86,700, and 26% of those residents earn more than $100,000. In fact, a slightly higher proportion of residents downtown earn more than $100,000 a year than in the city as a whole. While they make up just 16% of downtown's population, the highest-income residents have increased most dramatically, rising by 400% over the past 10 years.





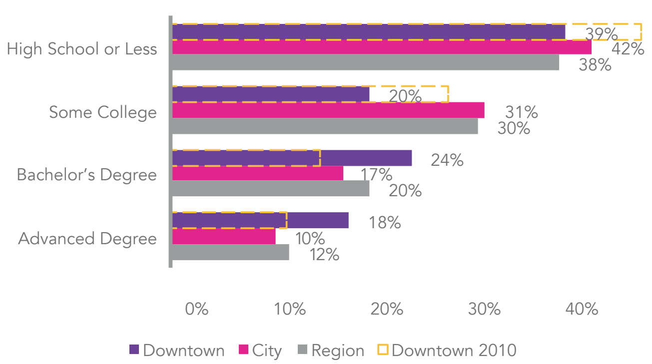
Source: American Community Survey 5-Year Estimates (2015–2019)

Economic Inclusion

Downtown offers opportunities for residents of all educational backgrounds. Like most downtowns, the largest share of residents above 25—42%—have a college degree; the rate surpasses the rates for the city or region. Significantly more holders of college or advanced degree live downtown today than in 2010.

Workers in jobs downtown tend to hold bachelor's or advanced degrees at a slightly higher rate than in the city or region. Nevertheless, downtown includes those with other educational backgrounds; 30% of workers hold either a high school diploma or less, or some college or an associate's degree.

Educational Attainment for Residents 25+



Source: American Community Survey 5-Year Estimates (2015–2019)

Household Income

	DOWNTOWN	CITY	COUNTY
MEDIAN INCOME	$24K	$37K	$57K
AVERAGE INCOME	$52K	$54K	$80K
MIDDLE-CLASS HOUSEHOLDS ($40K–$100K)	23%	34%	38%

Source: American Community Survey 5-Year Estimates (2015–2019)

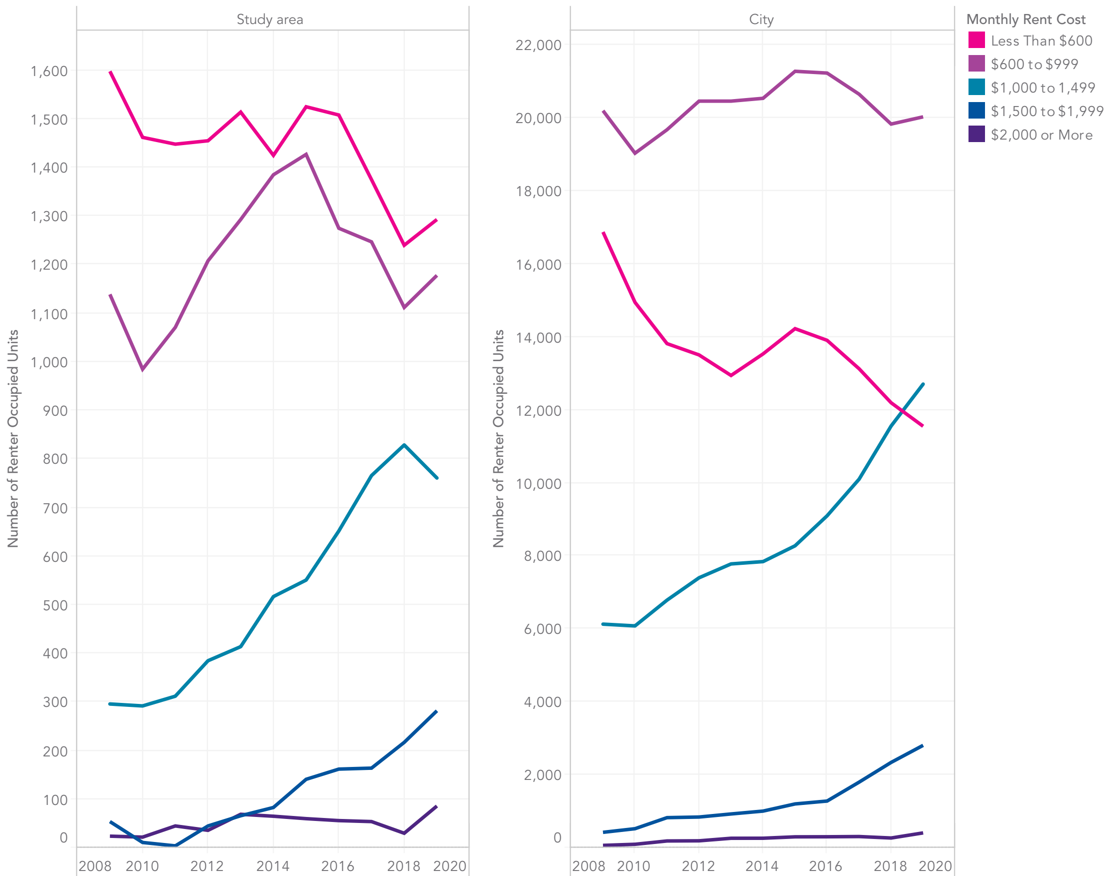
Jobs by Educational Attainment

	Downtown	City	Region
HIGH SCHOOL OR LESS	32%	37%	39%
SOME COLLEGE OR ASSOCIATE'S DEGREE	33%	33%	33%
BACHELOR'S OR ADVANCED DEGREES	36%	30%	28%

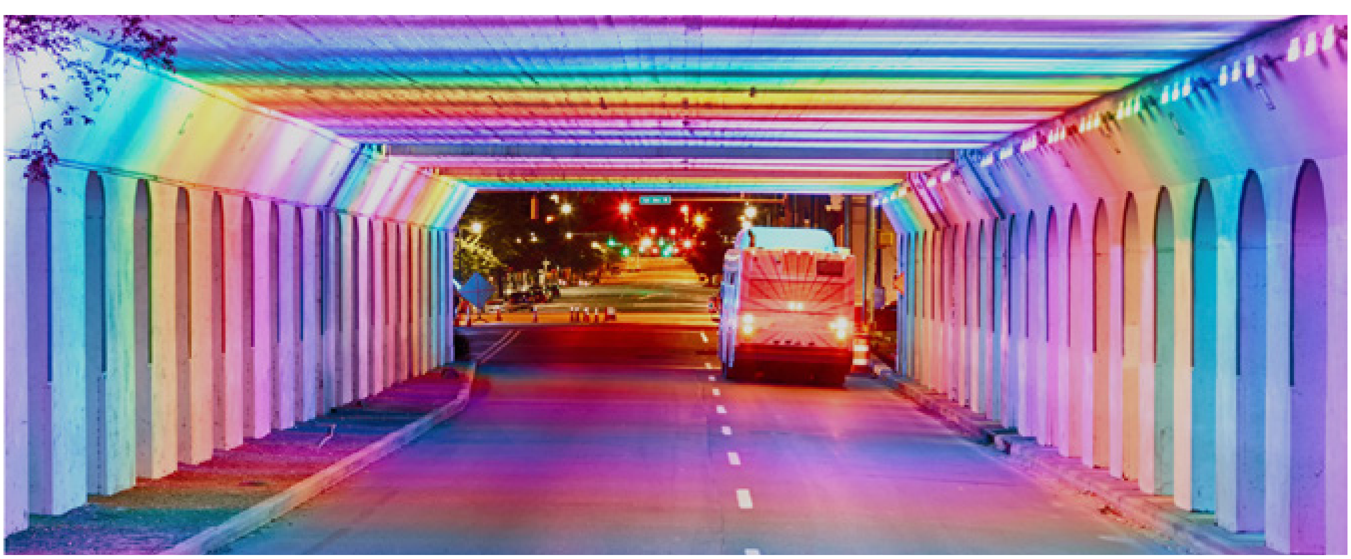
Downtown City Region

Source: LEHD On the Map (2018)

Rent Price Change Over Time



Source: American Community Survey 5-Year Estimates (2005–2009) to (2015–2019)



Housing and Affordability

Despite the fact that downtowns generally have higher housing prices, density of housing, concentration of jobs, and access to public transportation can make living downtown less expensive than living in other neighborhoods. Downtown boasts a lower Housing and Transportation Index score. This means that downtown residents spend on average only 35% of their income on housing and transportation combined, whereas city and regional residents spend 45% to 54% of their income on these needs.

As in most downtowns, rental units dominate the housing supply. With 87% of housing renter-occupied, downtown has more rental units than the average downtown. Median gross rent is $762, lower than the $837 median citywide, but this masks wide variation. Across the two highest-cost districts, downtown core/Uptown and the University, the median rent reaches $1,021, nearly equal to the national average rent of $1,062.

Median rent for the rest of downtown, including Five Points South, with the lowest median, is $492. Downtown has 20% of all subsidized housing in the city, and that pushes the median below market rent. Downtown encompasses very different residential markets, but the rate of population growth in all districts suggests plenty of room for continued growth at all price points. Since 2009, the number of units that rent for less than $800 has fallen by 24%, while the number of units renting for $800 and more has increased by 170%.

Housing and Transportation Index

Downtown	City	Region
35%	45%	54%

Source: Center for Neighborhood Technology (CNT) Housing and Transportation Index (2017)

Renters

	Downtown	City	Region
% RESIDENTS WHO RENT	87%	54%	29%
MEDIAN GROSS RENT	$762	$837	$896
MEDIAN RENT INCREASE 2010–2019	34%	23%	22%
RENT-BURDENED	40%	48%	43%

Source: American Community Survey 5-Year Estimates (2015–2019)

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."[3] Physical distancing measures during the COVID-19 pandemic have only emphasized the value of a vibrant downtown with restaurants, concerts, outdoor events, and festivals. The recovery of storefront businesses, event venues, and hotels post-pandemic will play an essential role in restoring a sense of vibrancy and normalcy.

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

Residential Growth

	Downtown	City	Region
RESIDENTIAL POPULATION GROWTH SINCE 2010	38%	-2%	-3%
RESIDENTIAL INVENTORY GROWTH SINCE 2010	14%	5%	-3%

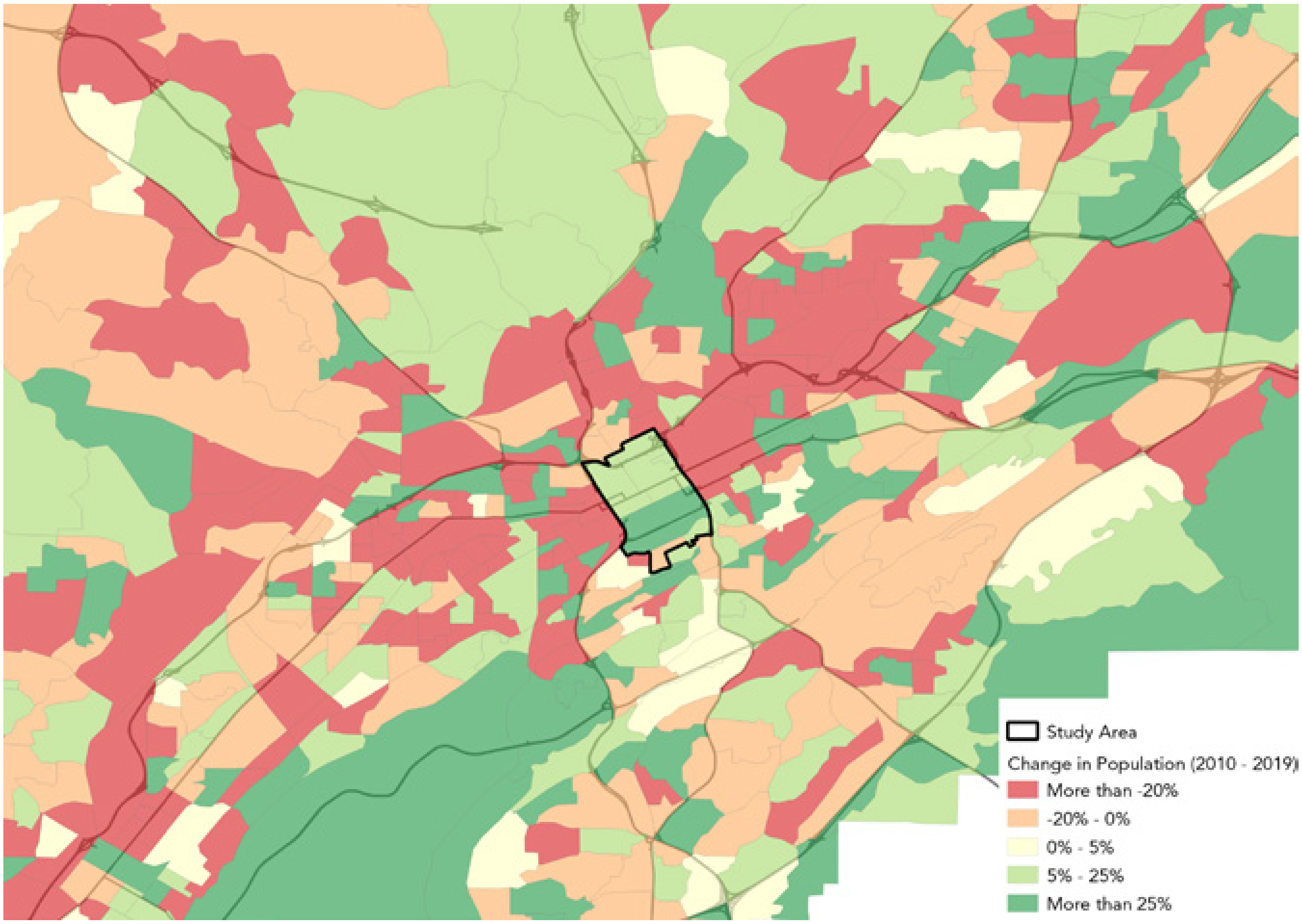
Source: American Community Survey 5-Year Estimates (2015–2019)

Residential Growth

Residential growth signals a fast-changing and vibrant downtown, one that has not only a working population by day but also activities and people throughout the day and night. Downtown's residential population has grown strongly since 2010, far outpacing rates for the city and region. During the period, downtown added more than 2,000 residents. All but one block group in the study area experienced growth, and the area south of Railroad Park grew by more than 80%. Immediately outside of downtown during this period, population actually declined in most areas but those adjacent to Five Points South. These trends highlight how downtown has led the surrounding area in population growth.

According to Alabama Power, downtown residential inventory grew by 59%, from 4,589 units in 2010 to 7,311 units in 2020. This rate of growth far outpaces city and regional rates over the same period. In addition, the 698 residential units under construction account for half of the region's residential construction. Downtown stands well-positioned to accommodate more growth. Project 20 Midtown, a recent large multifamily development, brought in downtown's first full-sized grocery store, among other amenities that have further encouraged a vibrant atmosphere day and night.

Population Change in Birmingham, 2010 to 2019



Source: IDA Analysis of U.S. Decennial Census (2010) and American Community Survey 5-Year Estimates (2015–2019)

Retail Sales

DOWNTOWN RETAIL SALES	SHARE OF CITY
$605 Million	17%

RETAIL SALES PER SQUARE MILE

$188 Million

Source: ESRI Business Analyst (2019)

All Retail

TOTAL RETAIL BUSINESSES

	Downtown	City
TOTAL RETAIL BUSINESSES	384	1,827
NUMBER OF RESTAURANTS AND BARS	165	838

Source: ESRI Business Analyst (2018)

Retail Vitality

Typically, a downtown's retail environment helps define the heart of the community and ranks as a key reason for residents, workers, and visitors to come downtown. Downtown's dining scene takes the lead in this area; downtown has more than one-third of citywide food and beverage businesses and nearly 30% of citywide food and beverage sales. Community responses solicited for the City Center Master Plan showed general retail as the most requested new business type, followed by grocery stores. The accommodation and food services sector has added 1,300 jobs since 2010, further underscoring the importance of food and beverage downtown.

In total, downtown generates an estimated $605 million in yearly retail sales, accounting for 17% of retail sales citywide. Downtown car dealerships generate nearly half of this value. Non-residents make roughly 90% of these purchases, indicating downtown businesses' reliance on customers from around the city and region.

According to CoStar, downtown has more than 5.6 million square feet of retail. At $13.65 per square foot, retail rent falls well below the average of $24.20 for downtowns in the Value of Downtowns study, but the vacancy rate of 5%, suggesting

Retail Real Estate

	Downtown	City	Region
SQUARE FEET OF RETAIL	5.6M	11M	83M
AVERAGE RETAIL VACANCY RATE	5%	4%	4%
RENT PER SQUARE FOOT	$13.65	$12.36	$13.36
INVENTORY PER SQUARE MILE	1.75M	75K	15K

Source: CoStar (2021)

a strong market, falls below the average downtown rate of 7%. Rents vary widely within downtown; in particular, new inventory costs much more than the study average. Downtown lacks a large supply of space dedicated to retail, and at least some, housed in historic properties, needs extensive work to meet code and be considered "move-in ready." Some historic spaces originally built for large-footprint retail—for example, department stores, which have largely disappeared—would require subdivision or adaptive reuse to make them more attractive to and useful for modern tenants.

With 2,897 rooms in 16 hotels, downtown has about 18% of hotels citywide but 38% of hotel rooms. This concentration underscores the intensity of activity downtown. The count puts Birmingham slightly above average among peer downtowns, but the average occupancy rate of 65% shows room for improving visitor attraction. As downtowns recover from the impacts of COVID, drawing more visitors will play a crucial role in restarting the local economy.

Downtown hosts several large and culturally significant festivals that celebrate the city's history and diversity. The annual Juneteenth celebration, presented by the Birmingham Civil Rights Institute, takes place in historic Kelly Ingram Park. The Sidewalk Film Festival showcases the historical theatre district, and Taste of 4th Avenue Jazz Festival highlights that historic thoroughfare. Fiesta, Alabama's largest celebration of Hispanic culture and cuisine, takes place in Linn Park. Autumn brings Oktoberfest to Railroad Park and, in November, the oldest and one of the largest Veteran's Day parades in the U.S. Each of these events brings together different communities from within downtown and the larger city, underscoring downtown's key function as a vibrant gathering space.

The festivals complement a full calendar of events at the Birmingham-Jefferson Convention Complex, which contains a theater, concert halls, and an arena. The pandemic hit Birmingham just as several event venues had either begun construction or launched renovations. In the fall of 2021, a new 47,000-seat stadium will begin operation, as will the newly renovated 17,000-seat Legacy Arena, and a 90-plus-room hotel. These venues will figure prominently in upcoming sporting events, such as the World Games in July 2022, the first and second rounds of the NCAA Men's Basketball Tournament in 2023, and the NCAA Women's Regional Round in 2025.

Hotels

	DOWNTOWN	CITY
HOTELS	16	91
HOTEL ROOMS	2,897	7,582
AVERAGE OCCUPANCY	65%	67%

Source: STR Report (2018)

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 represent one of the oldest neighborhoods citywide, they offer rare insights into their city's past, present, and future."[4] The authentic cultural offerings in downtown enhance its character, heritage, and beauty, and create a unique sense of place not easily replicated in other parts of the city.

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

Social Media

INSTAGRAM POSTS WITH HASHTAGS
#DOWNTOWNBIRMINGHAM
#BIRMINGHAMAL

	DOWNTOWN	CITY
INSTAGRAM POSTS	19,958	242,878
TWITTER FOLLOWERS	12,300	23,200
FACEBOOK FOLLOWERS	10,311	33,066

As of June 1, 2021

Downtown anchors a thriving region. Its distinct districts offer different assets and different lifestyles within a concentrated area. City Center serves as the traditional central business district, home to Birmingham's tallest and oldest buildings and an employment hub for financial/banking institutions and law firms with regional reach. The University of Alabama at Birmingham ranks as the largest single employer downtown and creates a unique university feel in its own district, which spills over to the emerging Switch district, home to innovation-focused enterprise.

Just west of the City Center, the Civil Rights District memorializes the struggle against segregation and honors key landmarks of the Civil Rights era. Parts of the district make up an established national monument, which includes the Birmingham Civil Rights Institute, 16th Street Baptist Church, AG Gaston Motel, and Kelly Ingram Park. The district also encompasses the Fourth Avenue Business District, once one of the largest Black-owned business districts in the U.S. These evocative embodiments of U.S. history are key attractions that bring visitors downtown.

The relatively young Railroad Park has started the work of stitching together downtown and creating a citywide "living room" for all. The 19-acre park offers a green respite in the heart of downtown, serving as a community space for the entire city. Immediately south of the park, Regions Field, home to the Birmingham Barons Minor League Baseball team, typically attracts thousands of fans to each game. Together, these two attractions have revitalized development downtown and continue to draw new investment.

Downtown, like many of its peers, has nurtured dynamic food, brewery and bar scenes. The food scene has won increasing attention, with a particular concentration of award-winning restaurants in Five Point South. In January 2020, CNN Travel named Birmingham an "unexpected foodie city."[5]

Finally, the Uptown district serves as downtown's hub for hospitality and entertainment. With the new convention complex, Protective Stadium, and Legacy Arena, it hosts hundreds of events in a typical non-pandemic year. The study area has led citywide preparation for the 2022 World Games, expected to bring more than 100,000 spectators to the first U.S. city to host the games since they began in 1981.

Building on the success of Railroad Park and the momentum of the World Games, downtown has developed a master plan for City Walk. At the border of Uptown and City Center, the trail will rethink the spaces beneath Interstate 20/59 bridges as sites for recreation, public art, and green spaces. The plan envisions a new destination that stitches together different downtown districts and offers new community space in a growing and thriving downtown.

Destinations and Unique Features

54
HISTORIC STRUCTURES

10
MUSEUMS

8
PARKS AND NATURAL AREAS

Source: National Register of Historic Properties (2021)

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. The COVID-19 pandemic has brought resilience to the forefront of everyone's minds. On the economic side, downtowns and their cities demonstrated a remarkable ability at the start of the pandemic to mobilize quickly and offer economic relief. Over the longer term, downtowns have proven they can bounce back quickly from economic downturns. Social resilience means that residents have sufficient access to essential health services and healthcare providers, but also that strong community support enables community residents and businesses alike to depend upon each other for support. The green spaces and trails that contribute to environmental resilience took on added importance as safe outdoor respites during the pandemic. Each of these elements illustrates how downtown boosts holistic resilience in the community and the larger city.

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

Downtown Community Resources

2	3	8
LIBRARIES	RECREATION AND COMMUNITY CENTERS	PARKS AND NATURAL AREAS

Source: Jefferson and Shelby Library County, City of Birmingham Parks and Recreation Board (2021)

Economic Resilience

As described in the Economy section, downtown's primary sectors include knowledge jobs in health care and social assistance, public administration, and educational services. This mix of activities positions downtown well to weather adverse economic events, including the COVID-19 pandemic. During the Great Recession, both downtown and the city lost jobs, but downtown employment bounced back sooner, growing 5% between 2009 and 2010, while the city added no new jobs.

Although the long-term impacts of increased remote work remain to be seen, we expect the post-pandemic recovery to follow a similar path, led by downtown job growth. In addition, the higher levels of educational attainment among downtown residents better equip them to adapt to changing economic conditions.

Social Resilience

Downtowns act as hubs for social resilience and the places where people gather in times of need. Downtown density means that a diverse mix of residents and employees have access to a multitude of community resources in a small area. With eight parks and natural areas, two libraries, and three recreation and community centers, downtown Birmingham equips residents, employees and visitors to meet, learn, and participate in civic life in multiple places. Nearly all of downtown sits within a 10-minute walk of a park, whereas only about 53% of city residents can walk to a park in 10 minutes. Railroad Park has significantly boosted open-space density downtown and has quickly emerged as the district's heart.

A healthy population forms a central element of social resilience, especially during a public health crisis. Downtown Birmingham's residents have one of the lowest average life expectancies across all of our study downtowns. At 71 years, it falls short of the citywide average (75) and well below the national average of 78.9. While the level of health insurance coverage matches the citywide rate, and the share of residents reporting leisure-time physical activity tops the citywide rate, a significant proportion of downtown households live in poverty, a situation that has dire effects on health outcomes.

Downtown has a higher rate of poverty than the city and the region, but many residents reporting incomes below the poverty line may be college or graduate students living off campus. They may not necessarily live in poverty, given that they likely receive financial support from family and, even with part-time employment, devote most of their time to school. Downtown also has more than 1,000 units of subsidized housing, about 20% of the city's total, and residents living there would have low incomes.

As more work, schooling, entertainment, and other daily activities move online—a shift accelerated by the public health response to COVID-19—access to a suitable computer or mobile device and to reliable internet service has grown increasingly essential. About 18% of households downtown don't have a computer at home, and a similar percentage lacks internet access; both figures are higher than the citywide and regional rates. This likely creates a barrier to economic opportunities for adults and children in these households.

Environmental Resilience

Downtown households typically emit fewer greenhouse gases than households across the city and region, and Birmingham proves no exception. On average, the average downtown resident emits 40% less in emissions than the average resident citywide. One key explanation lies in a shift in downtown commuting patterns toward more sustainable modes over the past decade. In 2012, 70% of downtown residents drove alone to work, but this figure dropped to 60% in 2019, accompanied by an increase in those who walk to work, which rose from 19% to 27%. Compared to city and region, a much larger proportion of downtown residents walk to work. Downtown's Walk Score of 86 also helps explain why. In fact, downtown ranks as the city's most walkable neighborhood.

Commuting by bike and transit remains low, even though downtown posts higher rates for both than the city and region. But momentum for expanding alternatives to driving has grown, building on an important base—that large group of residents who walk to work. The City of Birmingham and regional partners have begun planning a bus rapid transit line that should increase efficiency, speed, and transit options.

Access to Economic Opportunity

	Downtown	City	Region
RESIDENTS IN POVERTY	44%	26%	14%
HOUSEHOLDS WITHOUT A COMPUTER	18%	17%	12%
HOUSEHOLDS WITHOUT INTERNET ACCESS	18%	12%	9%

Source: American Community Survey 5-Year Estimates (2015–2019)

Health

	DOWNTOWN	CITY
AVERAGE LIFE EXPECTANCY	71	75
NO LEISURE-TIME PHYSICAL ACTIVITY	28%	34%
WITHOUT HEALTH INSURANCE COVERAGE	11%	12%

Source: American Community Survey 5-Year Estimates (2015–2019); CDC (2018)

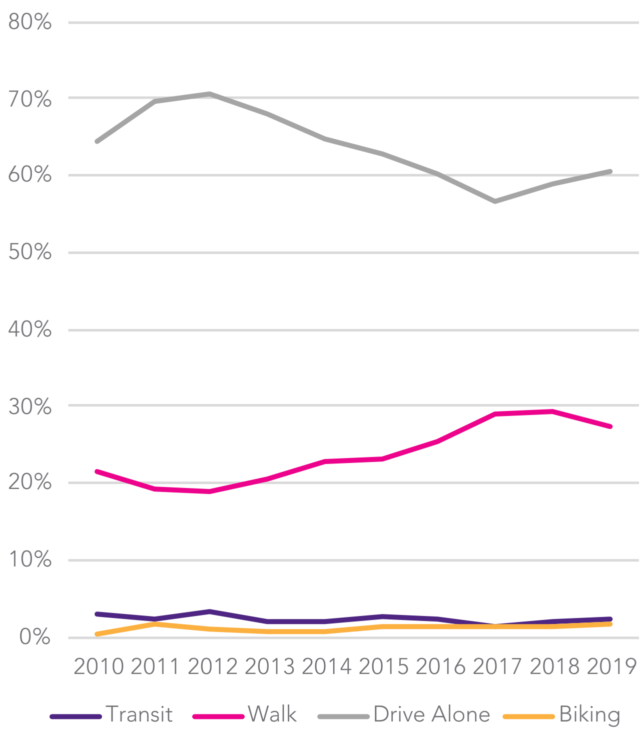
Additionally, the City has committed to improving and adding bike lanes and other bike infrastructure to broaden micromobility options. With 40% of commuters walking, biking, and/or carpooling, Birmingham has a much higher percentage of sustainable commuters than other emerging cities, which average 23% on this measurement. Downtown has a Transit Score of 55, which, although higher than the citywide score, demonstrates a need for more transit choices. Downtown's Bike Score, at 63, sits just below the average of peer downtowns.

Environmental Resilience

	DOWNTOWN	CITY	REGION
ANNUAL TONS OF GHG EMITTED PER HOUSEHOLD	5	7	9

Source: CNT (2018)

City Center Birmingham Commute Mode Share



Source: American Community Survey 5-Year Estimates (2015–2019)

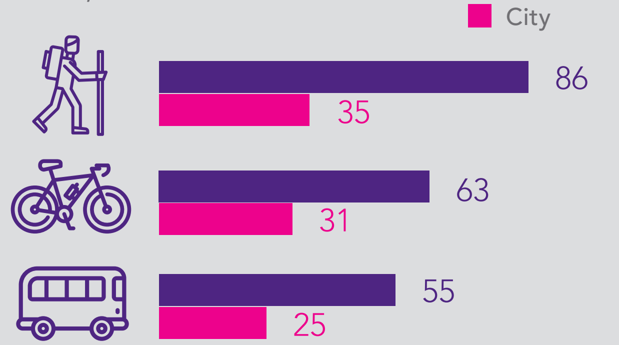
Bike-share has proved extremely popular downtown. REV Birmingham's Zyp bike-share program saw strong success from 2015 to 2019, with a total of 43,690 users taking 218,795 rides. The first public bike-sharing system in Alabama, Zyp was also the first nationally to use electric-pedal-assist bikes. The success of the public-private partnership proved the viability of bike-share in Birmingham and attracted the attention of private vendors. In April 2021, new bike-share and scooter vendors launched in the city, with a high concentration of micromobility corrals in downtown.

Downtown Commuting Patterns

	Downtown	City	Region
BIKE	2%	0%	0%
TRANSIT	2%	2%	1%
CARPOOL	7%	11%	10%
WALK	27%	3%	1%
DRIVE ALONE	60%	82%	88%

Source: American Community Survey 5 Year Estimates (2015–2019)

Walk, Bike and Transit Scores



Source: Walk Score (2021)

Downtown Profile | Summary

Downtown serves as the center of activity for the region, particularly with a high concentration of jobs in only 3.2 sq mi, or 2.2% of the city's land. It contains 37% of the city's jobs, 13% of the region's jobs, and more than half of the citywide jobs in finance and insurance, professional services, and education. The residential population has also grown quickly, and new developments promise to further densify this vibrant area.

Using data collected for *The Value of U.S. Districts and Center Cities* study, we identified three tiers of districts, defined by their stage of development. We divided the study districts into *established, growing* and *emerging* tiers based on the citywide significance of downtown population and jobs, density of residents and jobs within the district, assessed value per square mile, and the rate of growth in population from 2000 to 2018, and jobs from 2002 to 2017.

The accompanying tables show how Birmingham compares to its peers in this tier and to citywide averages for the tier. To see the full set of cities by tier, accompanying data points, and methodology, please refer to T*he Value of U.S. Districts and Center Cities* compendium.*

Birmingham ranks as an *emerging* downtown. IDA describes *emerging* downtowns as lacking high citywide significance in jobs and residents and having relatively lower densities. That means that they have substantial potential; typically, property values per square mile remain low relative to other urban places, allowing developers to see greater return on their investments. Similarly, lower rents make *emerging* downtowns attractive to small businesses and creators/makers.

While downtown Birmingham's larger-than-typical geography gives downtown less density, it does outperform other *emerging* peers in higher levels of citywide significance for its resident population and concentration of jobs. The potential to increase density creates opportunities for further commercial and residential growth.

Emerging Downtowns

ALBUQUERQUE	HOLLYWOOD	TAMPA
BIRMINGHAM	LANCASTER	TOLEDO
EL PASO	LITTLE ROCK	TUCSON
EVANSVILLE	OKLAHOMA CITY	TULSA
GRAND RAPIDS	SAN ANTONIO	WICHITA
GREENSBORO	SPARTANBURG	

Average of 2% of the citywide land area with an average assessed value of $1.4 billion (7% of citywide assessed value) and accounts for:

	CITY CENTER BIRMINGHAM	EMERGING DOWNTOWNS
CITYWIDE POPULATION	5.0%	2.3%
18-TO-34-YEAR-OLDS LIVING CITYWIDE	5.9%	3.1%

RESIDENTS

	CITY CENTER BIRMINGHAM	EMERGING DOWNTOWNS
GROWTH AVG. 2010–2019	15%	18%
DENSITY RESIDENTS / ACRE	5	6.7
MEDIAN INCOME HOUSEHOLD	$24K	$36K
DIVERSITY INDEX	60.2	63.9

EMPLOYMENT

	CITY CENTER BIRMINGHAM	EMERGING DOWNTOWNS
GROWTH IN DOWNTOWN EMPLOYMENT (2002–2018)	-9%	-3%
CITYWIDE JOBS	37%	17%
CITYWIDE KNOWLEDGE JOBS	42%	19%
CITYWIDE CREATIVE JOBS	43%	28%
RESIDENTS WITH A BACHELOR'S DEGREE OR HIGHER	42%	38%

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

	CITY CENTER BIRMINGHAM	EMERGING DOWNTOWNS
% CITYWIDE RETAIL SALES	17%	6%
RETAIL SALES PER SQUARE MILE	$188M	$203M

	CITY CENTER BIRMINGHAM	EMERGING DOWNTOWNS*
HOTELS	16	13
HOTEL ROOMS	2,897	2,182

*This figure excludes downtown San Antonio, which is an outlier for emerging downtowns.

SUSTAINABLE COMMUTE

CITY CENTER BIRMINGHAM	EMERGING DOWNTOWNS	EMERGING CITIES
40%	23%	6%

	CITY CENTER BIRMINGHAM	EMERGING DOWNTOWNS	EMERGING CITIES
WALK SCORE	86	81	41
BIKE SCORE	63	70	47
TRANSIT SCORE	55	44	22

Downtown Birmingham has seen 15% population growth over the past two decades, and as a result it boasts a higher percentage of citywide population than the tier average. Yet, density ranks below the average, signaling significant opportunity for greater residential development. Median household income sits substantially below that of other *emerging* downtowns, in part because downtown hosts a sizeable share of households in subsidized units and many college students.

Compared to other *emerging* downtowns, downtown has a much higher concentration of jobs, more in line with the levels in *established* downtowns. However, a 9% decline in jobs—compared to the 3% average decline for *emerging* downtowns—has clouded the employment picture. Part of this reflects a larger citywide decline of 7% in the same period, compared to average gain of 8% among other *emerging* cities.

In terms of retail, downtown features a much higher concentration of citywide retail than its *emerging* peers, yet retail sales density remains below the average for peer cities. That points to the need for more retail options. The number of hotels and hotel rooms stands on par with other *emerging* downtown peers.

Finally, Birmingham has a higher percentage of residents who use sustainable modes of transportation for commuting. The 40% of residents who choose sustainable commute modes aligns more closely with *established* downtowns and underscores the need to continue strengthening infrastructure and connectivity for all modes of transportation in downtown.

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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 30 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 43 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?

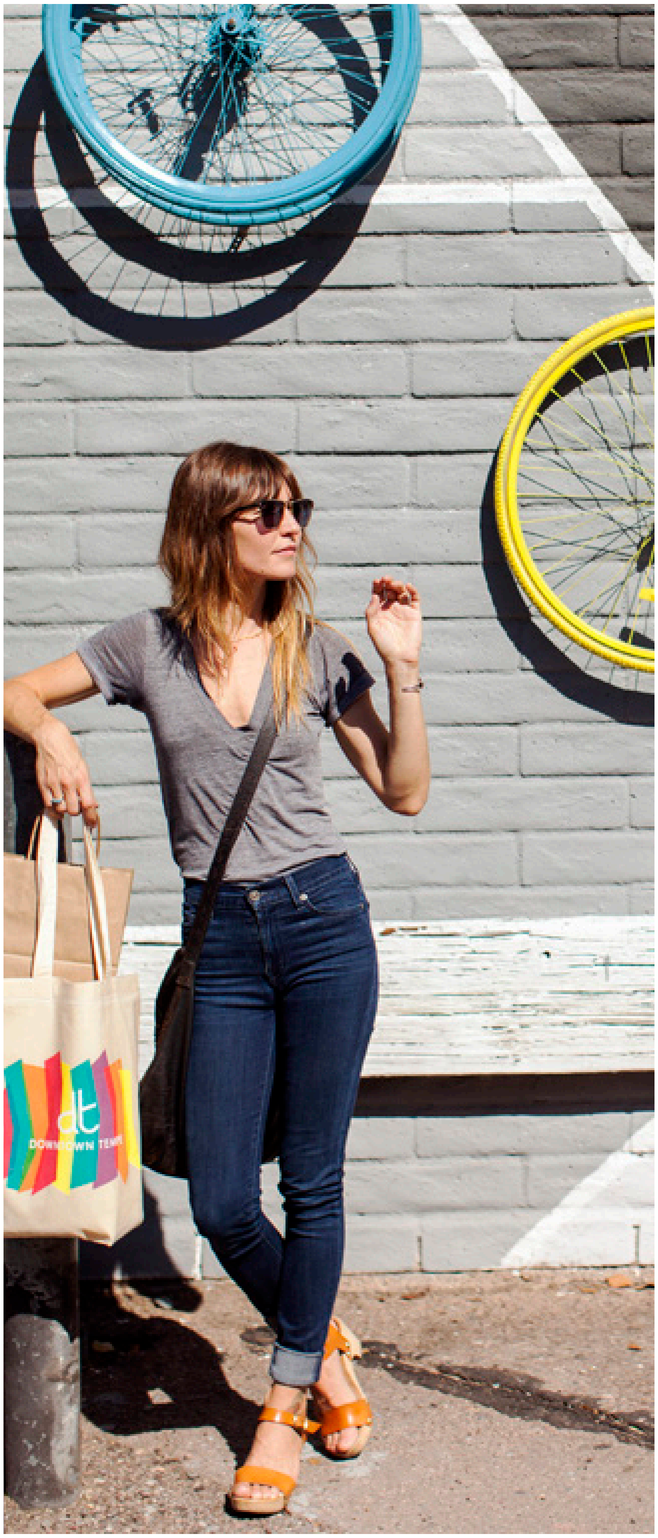
Downtowns have differing strengths: some function as employment anchors, some as tourist hubs, and some as neighborhood centers. Some are all three. We distilled the factors for measuring the value from attributes common to all downtowns regardless of their specific characteristics.

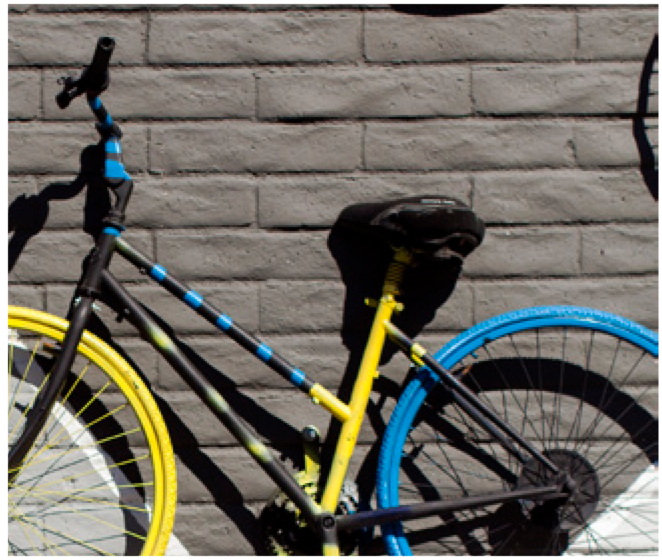
Fun	Diversity	Density	Creativity	Size
Economic Output	Mobility	Brand	Investment	Resilience
Health	Sustainability	Affordability	Fiscal Impact	Accessibility

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—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.

Enter value for downtown, city, and region	Computed automatically	Selected and refined by downtowns
INPUTS	**CALCULATIONS**	**ARGUMENTS**
• Total land area • Number of jobs	• Jobs per mi^2 downtown vs. city (dividing jobs by total land area) • Growth in jobs over time (comparing past totals to the current year) • Percentage of city jobs (dividing downtown jobs by city jobs)	"As the economic engine of the city, downtown has a density of jobs nearly three times the city average, a rate of job growth twice the city average, and nearly 40 percent of total city jobs."

BENCHMARKING TIERS

Based on the data collected for this study, we identified three tiers of downtowns, defined by stage of development. We divided the 43 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
  - Jobs per square mile
  - Residents per square mile
  - Assessed value per square mile
- Significance to city
  - Percentage of citywide jobs
  - Percentage of citywide residents
- Long-term growth
  - Percent growth in jobs (2002–2018)
  - Percent growth in population (2000–2019)

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 that accompanies *The Value of U.S. Downtowns and Center Cities* 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)
    - o By two-digit NAICS employment sectors
    - o By earnings
    - o By residence
    - o 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

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 its city, downtown typically attracts a large share of citywide visitors and holds a large share of citywide hotels and hotel rooms. An engaging downtown "creates the critical mass of activity that supports retail and restaurants, brings people together in social settings, makes streets feel safe, and encourages people to live and work downtown because of the extensive amenities."[1]

Illustrative metrics:

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

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

Downtowns and center cities are often iconic symbols of their cities, and this strong sense of place enhances local pride. The distinctive cultural offerings in downtown enhance its character, heritage, and beauty, and create an environment that other parts of the city can't easily match. Combining community history and personal memory, a downtown's cultural value plays a central role in preserving and promoting the region's identity. Downtowns and center cities serve as places for regional residents to come together, participate in civic life, and celebrate their region, which in turn promotes tourism and civic society.

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

Illustrative metrics:

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

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

As key centers of economy and culture, being resilient to city, regional, or even national shocks is highly important for ensuring stability, sustainability, and prosperity. Because of diversity and density of resources and services, center cities and their inhabitants can better absorb economic, social, and environmental shocks and stresses than the surrounding cities and regions. The diversity and economic strengths of strong downtowns and center cities equip them to adapt to economic and social shocks better than more homogenous communities. Consequently, they can play a key role in advancing regional resilience, particularly in the wake of economic and environmental shocks that hit less economically and socially dynamic areas particularly hard.

Illustrative metrics:

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

Appendix III: Data Sources

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

Source	Data Available	Pricing	Geographic Limitations	Most Recent Data Vintage in the Study
ESRI	Demographic, Housing, Detailed Establishments and Consumer Spending	Proprietary	None; allows for drawing of custom geographies; selection of sub-geographies down to census block group level	2017 to 2021 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	2020 (Annual Updates)
American Community Survey	Demographic, Housing, Employment	Public	Allows for selection of sub-geographies down to the census block group level	2019 (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	2018 (Annual Updates)
Center for Neighborhood Techology	Housing affordability, Sustainability, Income	Public	Allows for selection and exporting of sub-geographies down to census block group level	2017 (Updates Unscheduled)
National Register of Historic Places	Historic structures and districts	Public	None	2020 (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	2020 (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.

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

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

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

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

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

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

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

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

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

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

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

Additional IDA Sources

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

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

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

Downtown Rebirth: Documenting the Live-Work Dynamic in 21st Century U.S. Cities: This policy paper represents the culmination of a year-long effort by IDA and partners to develop an effective way of quantifying how many people and work in and around 231 job centers in 150 American cities. Without standard geographic definitions for downtowns and downtown residential neighborhoods, previous research relied on overly simplified boundaries that didn't capture the idiosyncratic shapes of urban employment nodes and thus failed to capitalize fully on existing federal data. For the first time, *Downtown Rebirth* suggests a way both to define and quantify downtown workforce and population numbers and document how these employment hubs and live-work environments are changing.

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

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Page 4

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Page 6

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Page 8

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Page 9

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Page 12

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Page 14

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Page 15

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Page 19

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Page 25

Clay Ousley at REV Birmingham. (2020). *Customer line at Red Cat.* Birmingham, AL.

Page 29

REV Birmingham. (2020). *Rainbow tunnel.* Birmingham, AL.

Page 30

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Page 32

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Page 33

Clay Ousley at REV Birmingham. (2020). *El Barrio.* Birmingham, AL.

Page 34

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Page 36

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Page 46

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Page 47

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Page 48

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Page 49

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Page 50

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Page 51

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Page 52

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Page 54

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Page 55

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Page 56

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Page 57

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Page 58

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