



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

CALCULATING THE VALUE OF DOWNTOWN TULSA, OKLAHOMA  
A 2020 IDA STUDY

A 2020 PUBLICATION CREATED BY  
THE INTERNATIONAL DOWNTOWN ASSOCIATION



INSPIRED LEADERS  
SHAPING CITIES

## ABOUT IDA



### IDA

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

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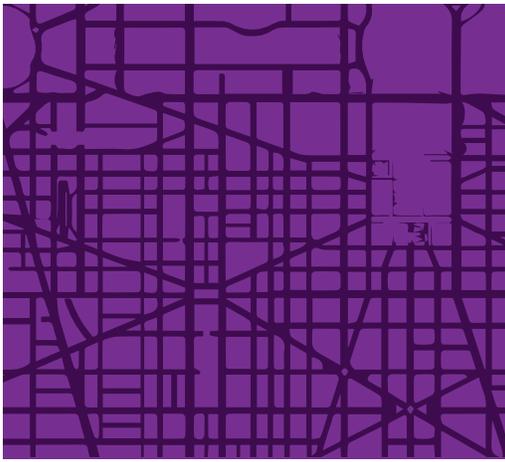
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# THE VALUE OF U.S. DOWNTOWNS AND CENTER CITIES



## 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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SECTION ONE  
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OVERVIEW



# Introduction

## GREAT CITIES START DOWNTOWN

No city or region can succeed without a strong downtown, the place where compactness and density bring people, capital, and ideas together in ways that build the economy, opportunity, community and identity. Downtowns across the U.S. experienced unprecedented change in 2020, a year fundamentally altered by the COVID-19 pandemic. As states and cities imposed shutdowns to control the spread of the new coronavirus, downtowns and urban centers emptied almost overnight, and the street life and interactions that give them such appeal ground to a halt.

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.

Showcasing the ways that downtown can lead urban resilience, downtown communities in cities across the country came together almost as soon as the pandemic began to support their residents, employees, and businesses. Downtown organizations became some of the first to provide relief to shuttered small businesses. Urban place management organizations quickly organized enhanced cleaning of public areas, disseminated trusted information, and in some cases directly provided relief funds to those most affected. Recognizing the importance of small and local businesses to downtown's unique character, downtown communities rallied to help businesses realize income through the purchase of gift cards and takeout or delivered meals from restaurants.

No one knows yet how the pandemic will change cities. Physical-distancing measures seem likely to become standard at public gatherings, outdoor cafes, and in parks for some time. Even though downtowns may lose some of their vibrancy temporarily with the shuttering of some local businesses, stay-at-home mandates, and continued physical distancing, the "new normal" may present new opportunities to adapt

downtowns and urban centers to a more human-centric future. Cities from Oakland to Milan have already begun experiments in reclaiming parking, travel lanes, and entire streets for pedestrians and cyclists or to add commercial space for outdoor dining that lets restaurants maintain six-foot (two-meter) separation while serving enough customers for economic sustainability. Work and school life will likely shift to include more telework and virtual options, which could maintain the improvements in air quality brought on by dramatic reductions in vehicular use during shutdowns.

On the other hand, an increasing role for remote work will reduce the customer base for downtown commerce and may lessen the importance of a location in downtown for many companies. Tourism, at least in the short-term, will shift from a national and international focus to a preference for regional travel—surveys show widespread consumer reluctance to spend multiple hours in the confines of an airplane—and that shift could have a large impact on downtown hotels and attractions. Fortunately, downtowns and center cities have a long history of evolving to adapt to changing times and market preferences. The value of downtowns may shift, along with the ways we use and evaluate them, 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.

Nobel Prize-winning economist Paul Romer has this to say about the future of urban agglomeration in the wake of COVID-19:

"The fact is that the intense interaction that cities allow is immensely productive. I think what we're going to learn from this is that there are a variety of ways to continue to interact frequently while minimizing the risks of transmitting viruses. I doubt that this is going to slow down the growth of cities. I think the underlying economic reality is that there is tremendous economic value in interacting with people and sharing ideas. There's still a lot to be gained from interaction in close physical proximity because such interaction is a large part of how we establish trust. So, I think that, for the rest of my life, cities are going to continue to be where the action is."<sup>1</sup>

## About the Value of Downtowns Project



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 has emerged from 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 2020, our analysis has expanded to include 37 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 more than 250 individual data points

across four benchmark years (most current year available, 2015, 2010, and 2000) 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 jobs) 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 pieces of data. All data included in the study predates the COVID-19 pandemic.

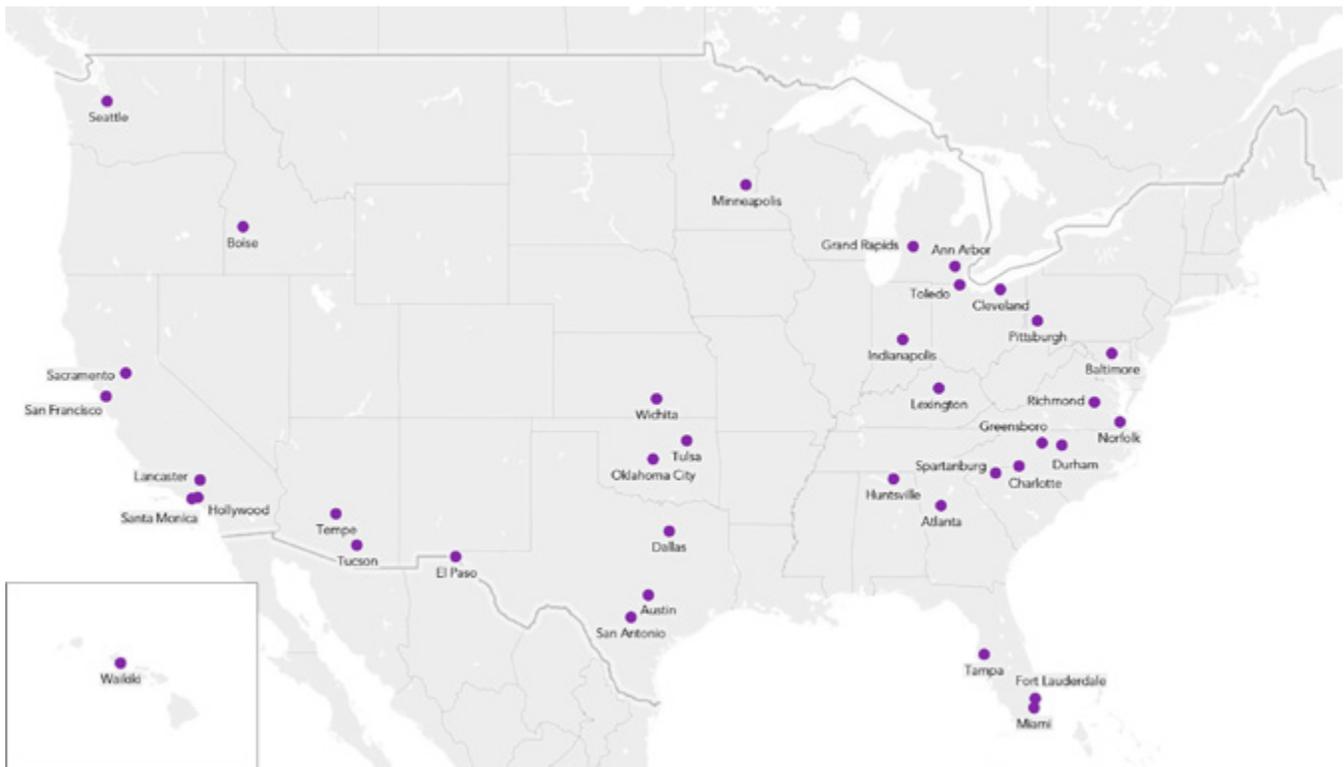
## Urban Place Management Organizations

IDA's members are urban place management organizations that manage growing districts to help create vital, healthy, thriving cities for everyone—from residents to visitors to business owners. These UPMOs are downtown champions that bring urban centers to life.

Since 1970, property and business owners in cities throughout North America have realized that revitalizing and sustaining vibrant downtowns, city centers and

neighborhood districts requires 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.



## 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 as 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 for 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<sup>i</sup>

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."*<sup>2</sup> 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.”

<sup>i</sup> Refer to the appendix for the full methodology and list of metrics used in the study.

## Known Limits to This Project

While this study aims to provide a comprehensive quantification of the value of downtowns, we know of several limitations to our approach. Not all local sources consistently collect the same data. Some supplemental data we ask our local partners to collect is not always available, making comparisons based on these metrics impossible. 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 neighborhoods. This makes it challenging to rely on local data for analysis and often results in some missing pieces in our narrative.

The sample size of 37 does gain representational power by its inclusion of downtowns that operate across a range of geographies and within widely varying contexts. Nevertheless, we recognize that its extrapolations may not apply to every U.S. downtown. Our most recent data also comes predominantly from the 2018 American Community Surveys

(ACS), and the 2017 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 the employment loss during COVID-19 will not be observed in our data sources for several years.

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

IDA has implemented a new data-collection system that allows us not only to expand the database for new study participants but also to update the publicly available data used for participants in previous years of this study. This means that we used updated data from previous years to benchmark this year's cohort of downtowns. We have begun to develop a plan for updating local data from earlier cohorts (e.g., tax information, visitor counts, etc.) to coincide with the next update of the decennial census.

In addition to all the data collected in previous years, we have continued to add new metrics from untapped data

sources. In social resilience, these include the percentages of residents without health insurance and of households without access to computers or internet access. We have also gone deeper into the analysis of select metrics, such as using income by age and school-enrollment data to tell a more complete story about residents downtown.

Analysis this year also included maps of population change and job concentration in the downtown as compared to the larger city. Future analysis will develop more spatial analysis and include more visual representations of data and trends, created with Tableau.



ONE Gas



SECTION TWO  
DOWNTOWN  
PROFILE

# Downtown Profile | Overview

A city's strength and prosperity depend on a strong downtown and center city, which serve as centers of culture, knowledge, and innovation. The performance of downtowns and center cities strengthens an entire region's economic productivity, inclusion, vibrancy, identity, and resilience. While the long-term impact of the COVID-19 pandemic remains impossible to predict, the pandemic has shown one thing clearly: the significance of downtown and its role as engine of and symbol for the rest of the city and region. Many of the sectors hit hardest by coronavirus shutdowns in 2020—retail, food, entertainment, tourism, arts and culture, and nonprofit organizations—both anchor downtown and make it so compelling. The revival of these very sectors will mark the start of the recovery, and accelerate the return of a strong citywide economy.

The data used in this report predates the COVID-19 pandemic.

A developing urban core with a strong economic foundation, downtown Tulsa shows promising early indicators of future growth. Since 2010 employment has remained stable while a rapidly growing food and beverage scene has taken root, along with a budding residential presence. The ability

## Study Area

DOWNTOWN PARTNER  
Tulsa Downtown  
Coordinating Council

CITY  
Tulsa, OK



to attract new residents, as downtown Tulsa has, plays a fundamental role in assuring a growing and vibrant district.

Between 2000 and 2018, downtown's residential population grew by 43%, adding 520 new residents. During this same period, housing development grew significantly to match the residential growth. Census data shows a 53% increase in housing, which reached a total of 1,800 units in 2018. In 2020, local organizations estimated that the total had reached 2,400 units, with 1,350 more units in the development pipeline. Local estimates also suggest the 2020 population to be around 3,200 based on housing units and occupancy.



## Employment 2017

	Downtown	City	Region
Primary Jobs	29,575	259,344	415,522
District Share of Primary Jobs	n/a	12%	7%
Employees per square mile	21,277	1,262	66
Primary Growth 2010-2017	3%	2%	8%
Private Growth 2010-2017	7%	3%	9%

Source: LEHD On the Map—Primary Jobs and Primary Private Jobs (2017).



## Residential Population\*

	Downtown	City	Region
Population	1,733	395,388	971,704
Residential Share	n/a	0.4%	0%
Residents per square mile	1,409	2,001	154
Residential Population Growth 2010-2018	22%	3%	5%

Source: IDA Analysis of U.S. Decennial Census (2010) and American Community Survey 5-Year Estimates (2014–2018)  
\*Excludes group quarters population. Total population for downtown is 3,507 with group quarters included.

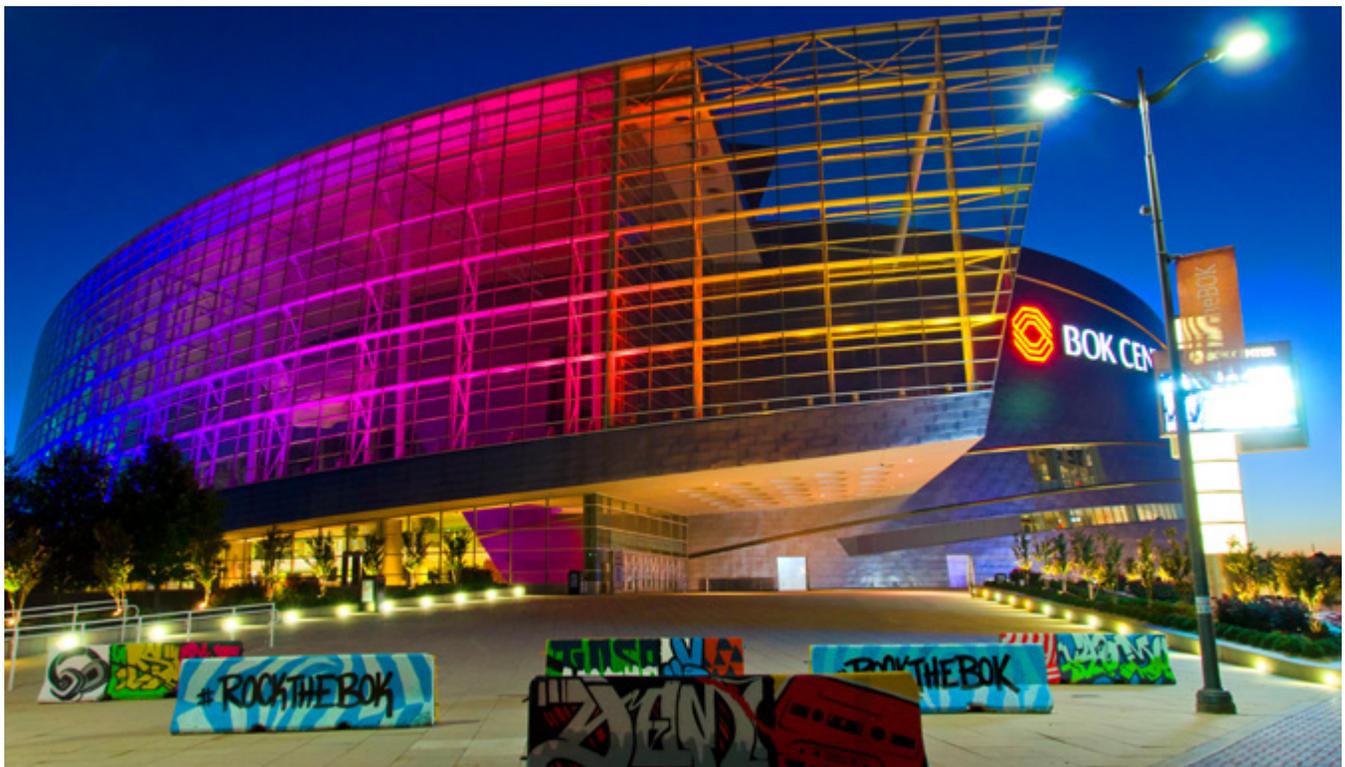
Downtown Tulsa's total population reported by the census contains a high number of residents in "group quarters," primarily institutional facilities (Tulsa County Jail) and three major non-institutional shelters for people experiencing homelessness. Whenever possible, this study does not include group quarters residents in population figures and demographic calculations. IDA and the Tulsa Downtown Coordinating Council agreed that jail and shelter occupancy levels should not skew the analysis of population trends and shifts in downtown. Each table and chart presenting population and demographics data clearly indicates whether or not it includes numbers of people in group quarters.

Inventory		Downtown	Share of City	Per Square Mile
	OFFICE (SF)	12.8M	30%	9.2M
	RESIDENTIAL UNITS	2,366	n/a	1.7K
	HOTEL (ROOMS)	2,210	14%	1.6K

Despite covering only 0.7% of the city's total land area, downtown contains 12% of the city's jobs. As of 2017, downtown had 29,600 jobs, a job density of 21,300 workers per square mile. Downtown has 17 times more workers per square mile than the average square mile citywide, showing a clear concentration of employment in the urban core. Tulsa's job density falls slightly below our study's median for urban places, ranking 24th among 37 downtowns. Its closest peers on job density are Tempe, AZ (22,100) and Hollywood, CA (20,700). Tulsa's ranking and the continued growth of these peer districts demonstrate that the city's urban core still has plenty of potential for growth. That potential hasn't gone unnoticed: at the end of 2019, the development pipeline for downtown and the nearby Pearl District and Gathering Place contained 59 significant projects.<sup>1</sup>

Downtown holds a much higher share of citywide office space than citywide jobs, which indicates a strong concentration of office workers. A similar concentration of hotels and hotel rooms speaks to downtown's strength as a destination within the region. While seeing strong growth in the number of residential units in the last decade, downtown still only holds one percent of the citywide total, according to census data on residential units.

Source: Costar (2019); American Community Survey 5-Year Estimates (2014–2018); Tulsa Downtown Coordinating Council (2020)

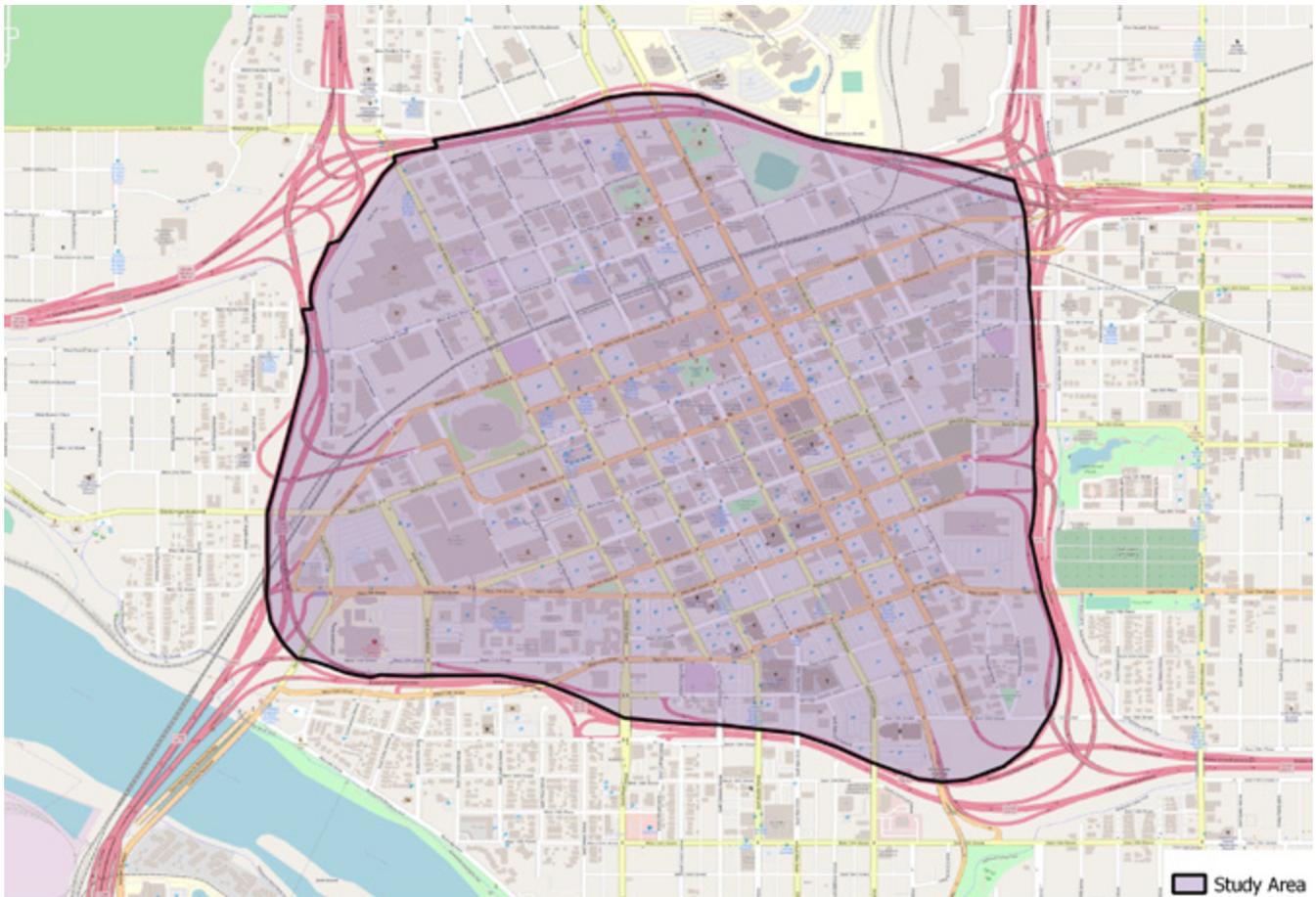
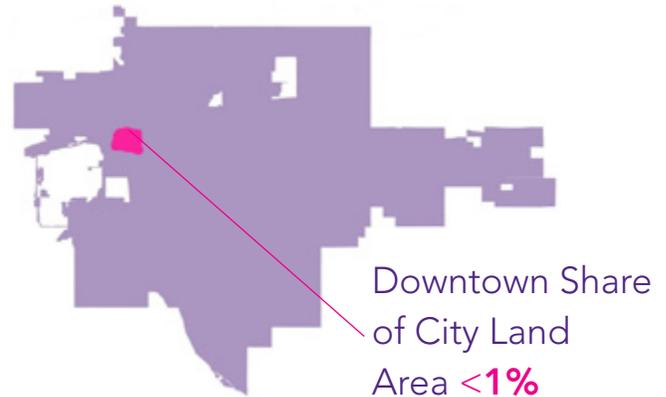


### Defining Boundaries

The study area matches the boundary of the Inner Dispersal Loop. IDA recommended that the urban place management organizations participating in this study use the commonly understood definition of downtown and match boundaries to hard edges, roads, water, natural features or highways. IDA worked with each group to align its downtown study area with census tract boundaries for ease of incorporating publicly available data from the U.S. Census.

IDA and the City of Tulsa Downtown Coordinating Council wanted to build a deeper understanding of downtown's contribution to citywide and metro-area performance across a range of areas. We grouped these areas under five principles—economy, inclusion, vibrancy, identity, and resilience—developed in 2017 in workshops with the first cohort of urban place management organizations assembled

for this kind of analysis. We evaluated data for multiple factors within each principle, focusing on trends and growth over time and how downtown compared to the city and region.



# Economy | Impact, Innovation

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

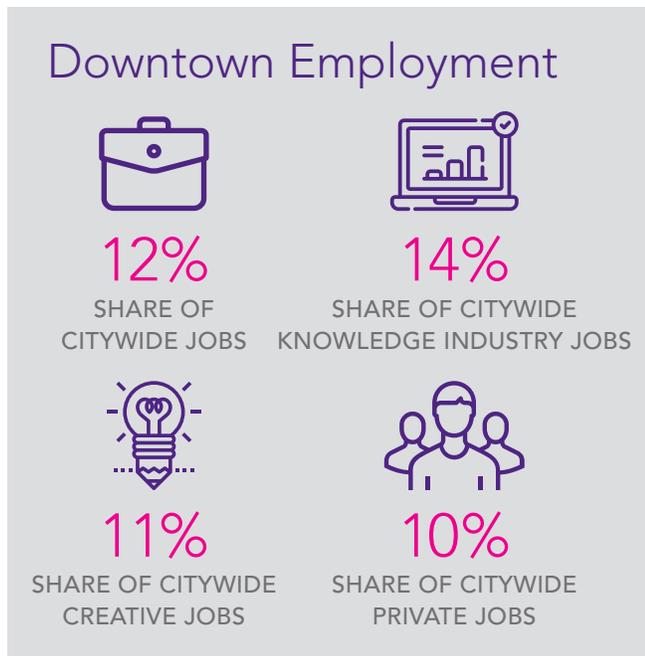
While downtowns and center cities constitute a small share of citywide land area, there’s no understating their regional economic importance. As traditional centers of commerce, transportation, education, and government, downtowns serve as economic anchors for their cities and regions. Thanks to highly 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 is still being felt, 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

## Jobs and Industries

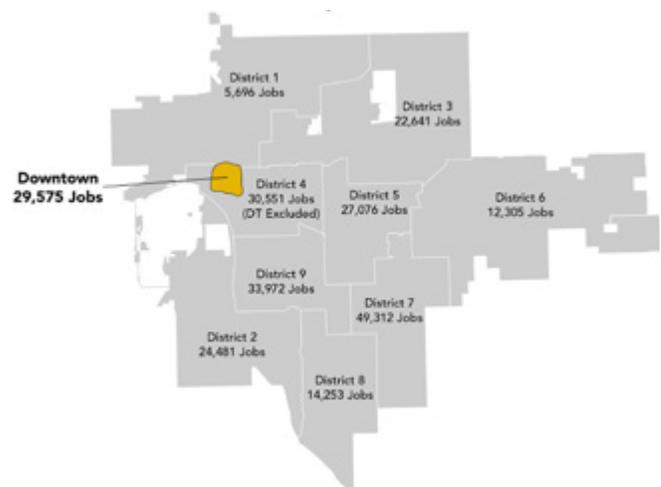
Downtown serves as an undeniably important employment center for the city. Although it only accounts for 12% of citywide employment, it serves as the anchor for several of the region’s major employment sectors. Regionally significant employers like Bank of Oklahoma, ONEOK, Williams, and AEP/PSO all maintain headquarters in downtown. A high concentration of knowledge industry positions downtown includes 26% of all citywide jobs in the professional, scientific, and technical services sector and 37% of all jobs in the information sector.

Downtown has a slightly lower share of citywide creative jobs and accommodation and food service jobs, suggesting strong regional competition for providing entertainment. Within the city these jobs have concentrated downtown and around the nearby casinos. The accommodation and food services sector in downtown has experienced very strong growth in the last decade, almost doubling between 2010 and 2017, which suggests a rapidly expanding hospitality industry evolving into a strong regional draw.



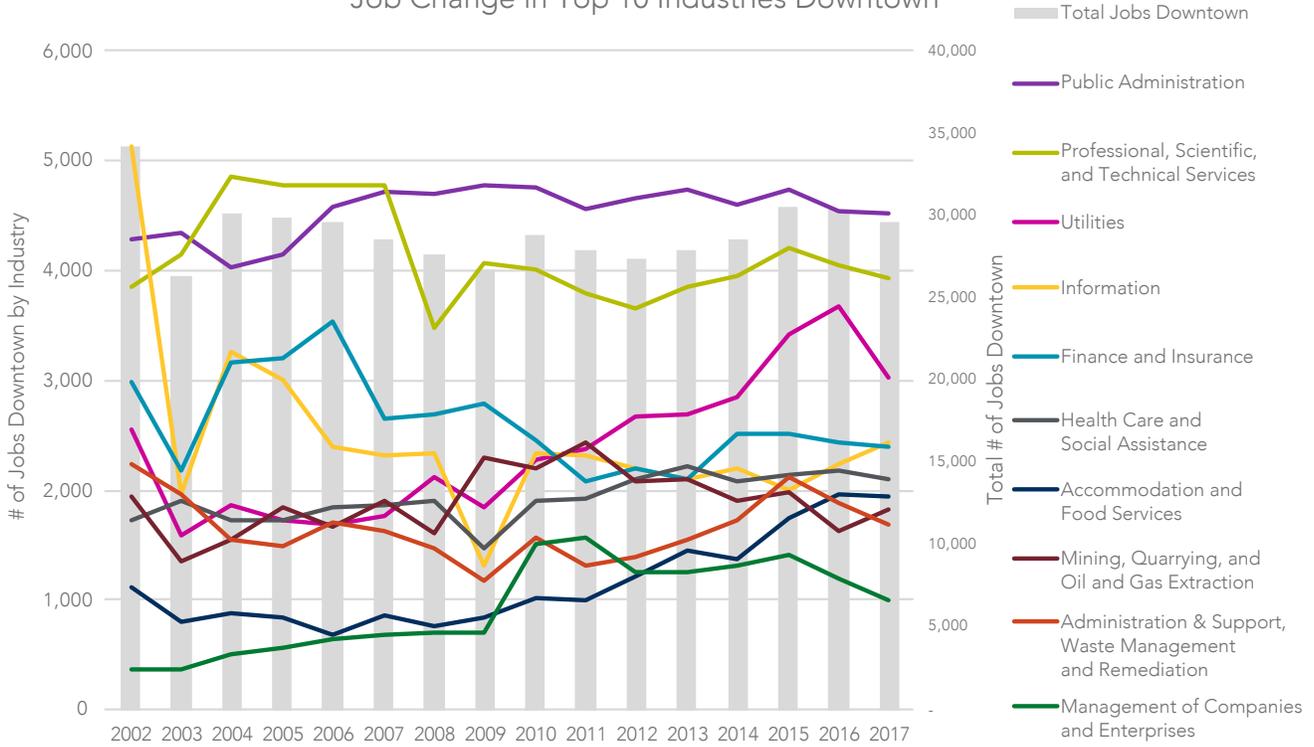
Source: LEHD On the Map (2017) Creative jobs are defined as those in the Arts, Entertainment and Recreation sector (NAICS Code 71).

## Jobs in Tulsa by Council District



Source: LEHD On the Map (2017) Primary Jobs. Downtown jobs removed from District 4’s total.

### Job Change in Top 10 Industries Downtown



Source: LEHD On the Map (2002-2017)

## Knowledge Industry Employment Growth 2010-2017

Finance, Insurance, Real Estate and Rental and Leasing



Management of Companies and Enterprises



Professional, Scientific, and Technical Services



Information



Health Care and Social Assistance



Total Knowledge Job Change

	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
Downtown	-4%	-33%	-2%	4%	10%	-3%
City	2%	-6%	-3%	5%	4%	2%
Region	-1%	4%	7%	0%	7%	5%

Source: LEHD On the Map (2017)

## Employment (Primary Jobs)

	Downtown	City	Region
NUMBER OF JOBS	29,575	249,344	415,522
PRIVATE JOBS	24,441	241,945	387,148
KNOWLEDGE INDUSTRY JOBS	12,033	86,998	116,237
CREATIVE JOBS	555	5,115	10,676
ACCOMMODATION AND FOOD SERVICE	1,944	20,752	34,950

Source: LEHD On the Map (2017)

Public administration, professional, scientific and tech services, and utilities constitute downtown’s three biggest employment sectors. Professional, scientific, and tech services and public administration should have the capacity to weather COVID-19 economic impacts fairly well, but utilities companies have observed a sharp drop in energy demand as lockdowns have cut both commercial and industrial use.<sup>2</sup> The Energy Survey produced by the Federal Reserve of Kansas City found that about a third of energy firms in the region could not survive more than a year at current revenue levels, but COVID alone doesn’t account for all the headwinds, as low oil prices had already strained the industry before lockdowns began.<sup>3</sup> Downtown’s recovery



## Jobs by Earnings Per Month

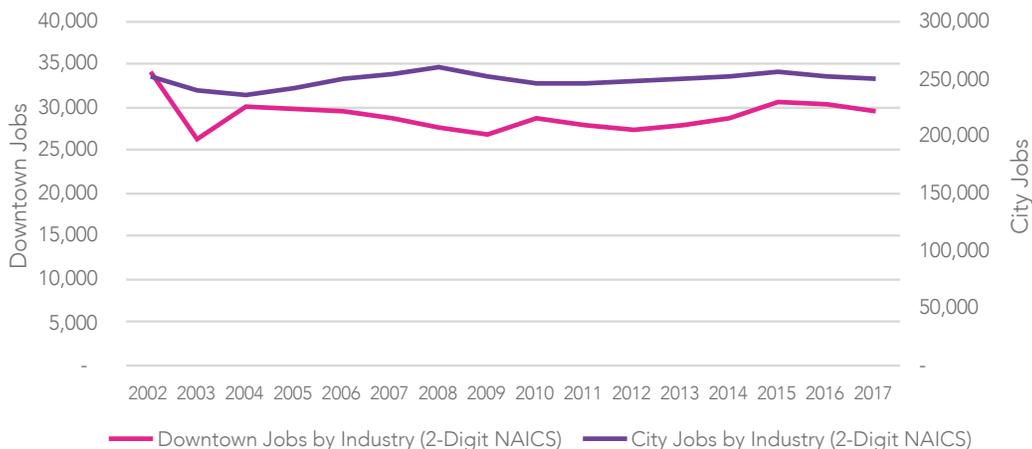
	Downtown	City	Region
\$1,250 OR LESS	9%	18%	19%
\$1,251-\$3,333	25%	37%	37%
MORE THAN \$3,333	66%	45%	44%

Source: LEHD On the Map (2017)

from the 2007-08 recession is encouraging and hopefully signals a speedy recovery from the economic impacts of the pandemic.

Overall, downtown experienced a slight decline in knowledge jobs between 2010 and 2017, primarily driven by losses in the management of companies and enterprises sector. Over the last two decades downtown’s citywide share of knowledge jobs has eroded as the number of those jobs declined. In 2002 downtown had 16.4% of knowledge jobs citywide; that fell to 14.5% in 2010 and to 13.8% in 2017. At the same time, downtown has seen a growing concentration of utility industry jobs, which rose from 60% of the citywide total in 2010 to 77% in 2017.

## Job Growth Trend Downtown vs City



Source: LEHD On the Map (2002-2017)

Well-paying jobs predominate in downtown. Two-thirds of workers earn more than \$3,333 per month (\$40,000 annually) compared to only 45% of workers citywide. This parallels the education level for downtown workers—just more than two-thirds of workers have some form of higher education.

### Entrepreneurial Environment

A strong entrepreneurial environment that supports both small businesses and startups in all industries is critical to a thriving downtown. Small businesses generate new jobs, promote innovation and competition, and account for almost half of U.S. economic activity.<sup>4</sup>

Firms of more than 250 people account for a large majority of jobs downtown, including three Fortune 1,000 companies. A smaller percentage of downtown employees work at firms with fewer than 20 people than in the city or region; that suggests that downtown doesn't offer a particularly strong environment for small businesses compared to the rest of the city. Between 2011 and 2017, 72% of private job growth in downtown came from firms of more than 250 people, which suggests that the balance between large and small firms continues to tip further toward large companies.

Given the concentration of jobs at firms with more than 250 people, it's not surprising that businesses more than 11 years old account for a large proportion of jobs. This data suggests that downtown doesn't appear to have a higher appeal for startups than the rest of the city or region. However, more recent observation hints at a turn toward a stronger entrepreneurial presence. Downtown now has five coworking/incubator spaces available to accommodate startups and new businesses, and *Inc.* magazine named Tulsa a "Surge City" in an article highlighting downtown's more recent entrepreneurial enterprises and amenities.<sup>5</sup> One such example is 36 Degrees North - a high-growth tech-oriented incubation space now seeking a greater presence downtown. The work of the George Kaiser Family Foundation and Tulsa Innovation Labs has been fueling this momentum through the creation of more innovation and tech economy jobs.

One important caveat to the data in this section: it does not account for self-employed workers, omitting jobs at small and young firms that typically represent small businesses just getting started.



## Jobs by Firm Age (2014-2017)

	Downtown	City	Region	DT Totals
FEWER THAN 4 YEARS OLD	5%	7%	7%	1,288
4-10 YEARS	8%	10%	11%	1,934
11+ YEARS	87%	84%	82%	21,219

Source: LEHD On the Map (2017)

**A strong small business presence—especially one that thrives in the context of a busy, livable, walkable downtown—is what gives a community its character.”**

– Quint Studer, *Strong Towns*<sup>6</sup>



## Jobs by Firm Size

	Downtown	City	Region	DT Totals
FEWER THAN 20 PEOPLE	11%	15%	17%	2,733
20-249 PEOPLE	21%	25%	25%	5,048
250+ PEOPLE	68%	60%	58%	16,660

Source: LEHD On the Map (2017)

## Fiscal Impact

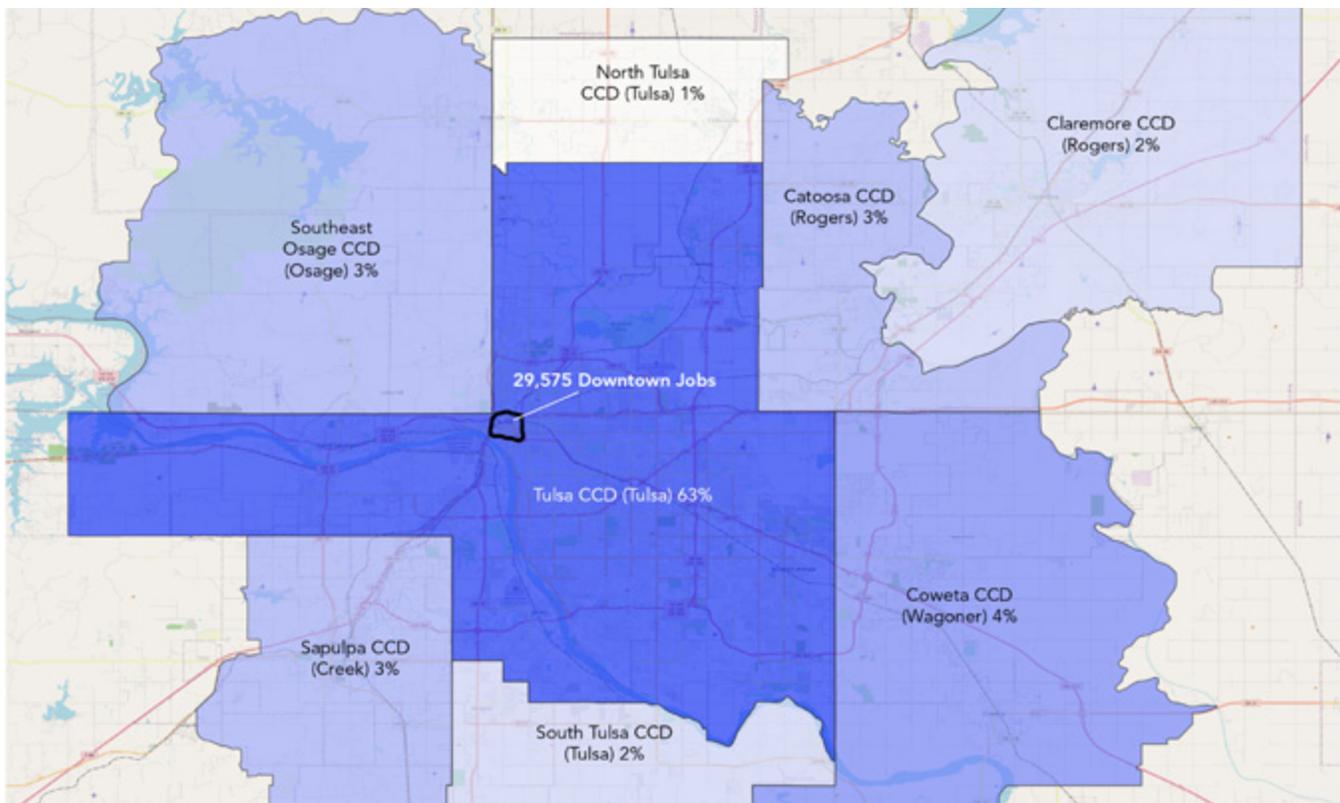
Downtown acts as a regional employment hub drawing workers from even beyond its bordering counties. 63% of workers come from within the Tulsa Census County Division (CCD), 18% come from the surrounding county subdivisions, and another 19% commute from even further out to jobs in downtown.

Under state law, counties can only tax between 10% and 15% of a property's market value, a restriction that forces Tulsa's municipal and county government to rely more heavily on sales tax than property tax as a revenue source. An assessment ratio of 11% in Tulsa County means that downtown Tulsa accounts for just over \$200 million in assessed taxable value, 5% of the city's total. This averages \$149.8 million per square mile in taxable value, among the lowest assessed values in this study. The total represents a fraction of the \$1.9 billion in total market-rate value in

downtown, according to data from the county assessor. If properties were assessed at their full market value, like most other places, Tulsa's assessed value per square mile would be around \$1.4 billion, much closer to our study median. Downtown is on a strong growth trend currently in terms of property value - between 2008 and 2019 value increased by \$938m (98%) after adjusting for inflation.

With municipal budgets resting solely on local sales tax revenues it is critical that downtown show value to the city by generating sales tax revenue. An analysis commissioned by downtown leaders showed that downtown sales tax permits accounted for 20% of the City's total tax revenue in 2018. This large share of citywide revenue is driven in part by ticket sales for events and paid parking (which is taxed) in addition to normal retail sales.

## Where Downtown Workers Come From By County Subdivision



Source: LEHD On the Map (2017)

# 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.”<sup>7</sup>

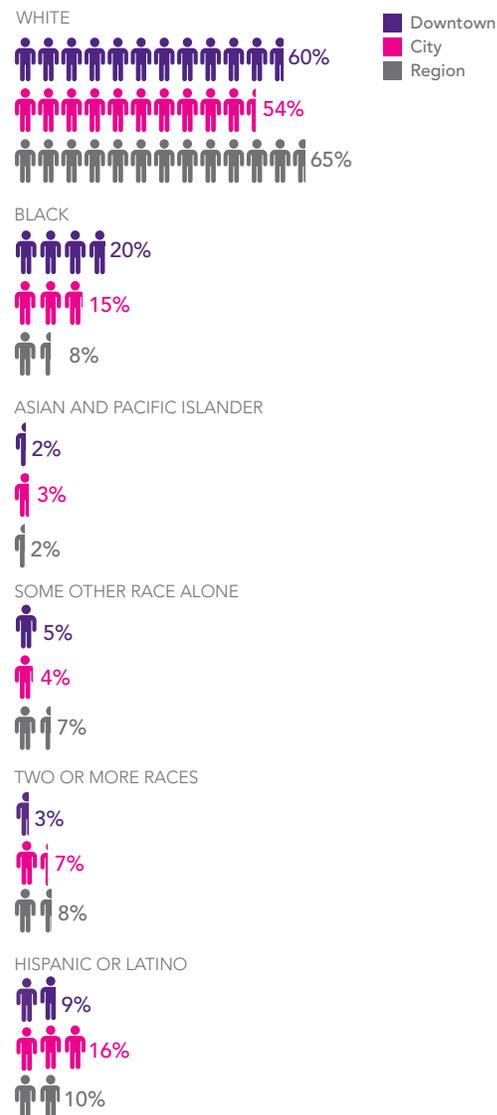
**Benefits of Inclusion:** Equity, Affordability, Civic Participation, Civic Purpose, Culture, Mobility, Accessibility, Tradition, Heritage, Services, Opportunity, Workforce Diversity

## Racial Diversity

The data from the chart “Residents by Race,” which includes the group quarters population, shows downtown’s share of white residents falling between the city’s and the region’s shares, and shows downtown leading the city and region in its share of black residents. 2010 data that excluded the incarcerated and sheltered populations show downtown with a higher proportion of white residents and slightly lower proportions of black and Hispanic or Latino residents, more closely mirroring the region’s demographics at the time.

Comparing the racial backgrounds of downtown workers to downtown residents reveals a striking contrast. Both downtown and the city have higher percentages of white workers than white residents and lower shares of black workers than black residents. This may indicate that nonwhite residents find fewer opportunities in downtown and the city. This

## Residents By Race\*

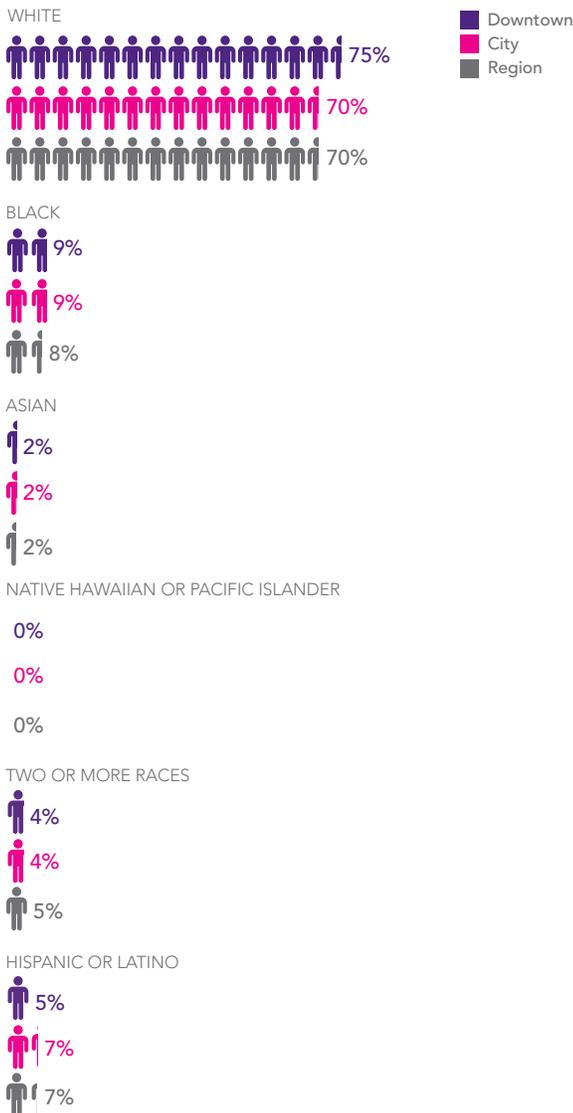


Source: American Community Survey 5-Year Estimates (2014-2018)

\*This figure includes residents of group-quarter facilities in downtown, which skew the demographics because those residents are disproportionately nonwhite. Data from 2010, without those residents, reported the downtown population as 68% white.



## Employment By Race\*



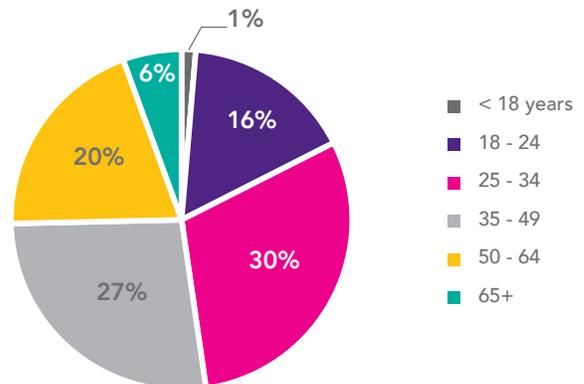
Source: LEHD on the Map (2017)  
 \*This data does not include the incarcerated population in downtown.

trend may look more extreme due to the effect of the group-quarters population on the data, but the adjusted 2010 data also shows an imbalance.

### Age Diversity

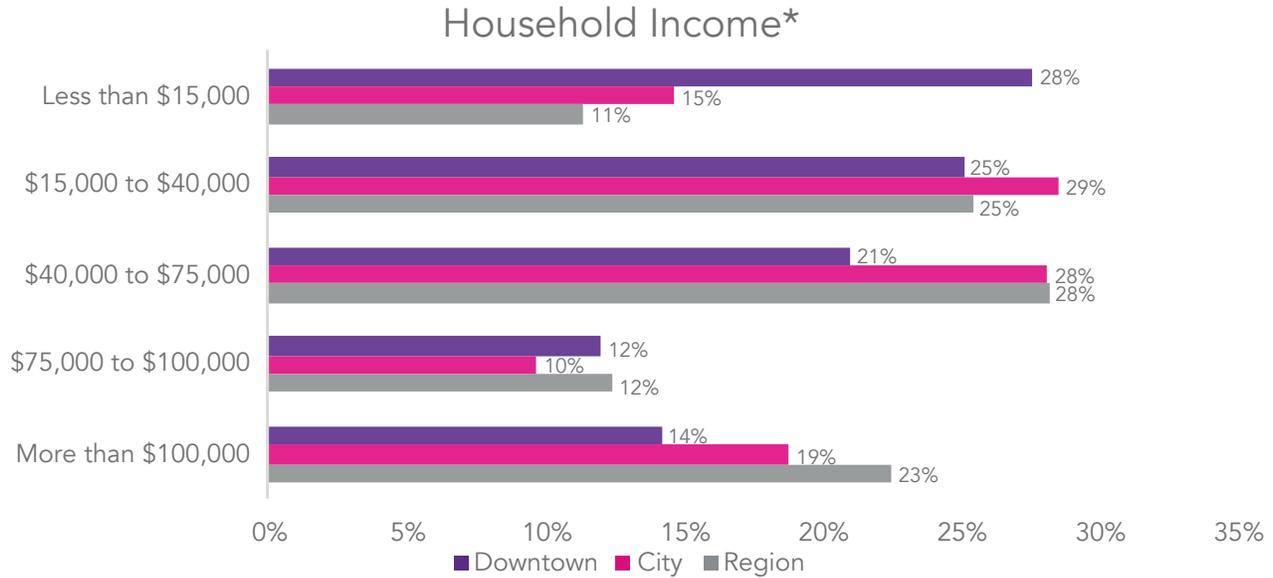
Residents aged 25 to 49 make up 57% of the downtown population, but that age range only accounts for one-third of the citywide or regional populations. This could reflect the impact of the jail: the Federal Bureau of Prisons says 75% of all inmates fall between the ages of 26 and 50.<sup>8</sup> Downtown seems to have few families with children, with just 1% of the population younger than 18. That figure reaches 25% for the city as a whole. Similarly, few residents older than 65 live downtown, making up just 6% of the population, compared to 14% citywide.

### Downtown Age Diversity



Source: American Community Survey 5-Year Estimates (2014–2018)

\*Includes group quarters, the 2010 census did not provide specific enough data on group quarters population by age to separate.



Source: American Community Survey 5-Year Estimates (2014–2018) \*Does not include group quarters, which don't count as households

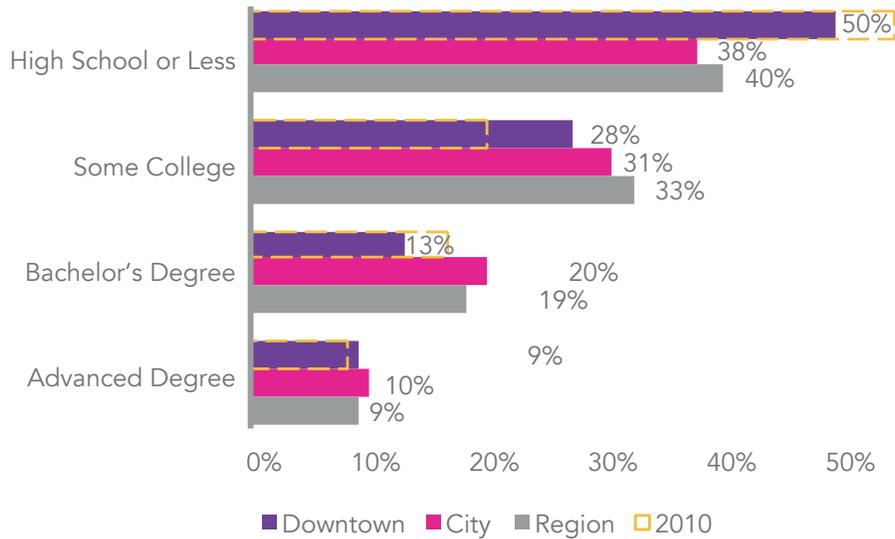
### Socioeconomic Diversity

Downtown households have a lower median income than households citywide, and nearly twice as many (per capita) report income below \$15,000 per year—28%, compared to 15% citywide. However, downtown's socioeconomic profile has begun to shift, with the addition of more affluent households since 2010. In 2010 only 270 downtown households earned more than \$50,000 per year; by 2018 that number had doubled. During the same period the median household income downtown increased by \$10,000. These trends alone don't raise immediate alarms about displacement, because the number of households with lower income doesn't appear to have fallen, suggesting those households haven't been priced out to make room for more affluent residents. Whether or not neighborhoods in an urban place are gentrifying always sparks local debate, but the data available for the study does not raise red flags on a corresponding rise in affluent households and loss of lower-income households. Tangentially, available data don't allow measurement of any ongoing shift in the district's racial profile. That will have to wait until the 2020 Census data becomes available, when analysts can separate the group quarters population from the overall figures.

### Economic Inclusion

Half of the downtown population, including those in group quarters, have a high school diploma or less, 10% higher than the comparable national figure. The incarcerated population has driven this result: a Bureau of Justice Statistics study found that 86.5% of local jail inmates nationally had a high school diploma or less.<sup>9</sup> Nevertheless, the share of downtown Tulsa's residents with at least some college education has risen since 2010, with an additional 250 college-educated residents having arrived by 2018 alone. Downtown employment favors educated workers, with 68% of employees over 29 having at least some college education.

## Educational Attainment for Residents 25+\*



Source: American Community Survey 5-Year Estimates (2014–2018) \*Includes population in group quarters.

### Jobs by Educational Attainment (Workers 29+)

#### HIGH SCHOOL OR LESS



31% 40% 42%

#### SOME COLLEGE OR ASSOCIATE'S DEGREE



34% 34% 34%

#### BACHELOR'S OR ADVANCED DEGREES



34% 26% 24%

■ Downtown ■ City ■ Region

### Housing and Affordability

Growing downtowns where housing demand exceeds supply often take heat for relatively high housing prices. Yet density of downtown housing and jobs and good access to public transportation options can lower the overall cost of living. Combining housing and transportation costs to compare affordability often yields a surprise: living downtown can cost less than living elsewhere in the city or suburbs. This holds true in Tulsa, where the downtown median rent may surpass the citywide median but only 42% of household income goes to housing and transportation combined. That compares to 49% citywide. As in many urban places, renters make up the bulk of downtown Tulsa residents, and only 35% of households spend more than 30% of income on rent, a comparatively modest proportion. Although the increase in median rent since 2010 looks steep as a percentage—and does raise a concern about affordability and equity—the size of the increase reflects 2010's low base, when median rent was less than \$400.

Source: LEHD on the Map (2017) This data does not include the incarcerated population.

Although this condition may not last, home ownership in downtown compared to income makes Tulsa the most affordable of all the downtowns in our study. While owner-occupied units account for only 11% of housing, their median cost is around 2.7 times median household income and median home price comes in \$30,000 lower than the city-wide median. The home price-to-income ratio has gone as high as 16.1 among the downtowns participating in the study.

A 2019 study of the downtown housing market commissioned by the City of Tulsa and Downtown Coordinating Council found significant demand for housing at all price points within downtown and immediately adjacent neighborhoods. Demand for affordable housing ranks as high, despite a sizable inventory of unsubsidized low-cost housing; those units are largely low-quality, and the people who live there experience an elevated eviction rate. At the other end of the spectrum, strong demand exists for upscale and luxury housing. As a result, the study estimated net demand over ten years for around 1,000 new units for downtown.<sup>10</sup>

The 2019 study cited economic growth and an expanding pool of amenities and services as reasons for the downtown market's increasing vitality. The study recommends continuing to capitalize on public assets to help capture this housing demand and sustain residential growth in part through building and relaunching a revolving loan fund aimed at incentivizing market rate and affordable housing. Construction of 47 new workforce housing units in the historic Oil Capitol Building offers a prime example of the strategy to increase affordable inventory.<sup>11</sup>

## Housing and Transportation Index

Downtown	City	Region
42%	49%	53%

Source: Center for Neighborhood Technology (2017)

## Renters

	Downtown	City	Region
% RESIDENTS WHO RENT	88%	48%	34%
MEDIAN GROSS RENT	\$911	\$810	\$831
MEDIAN RENT INCREASE 2010–2018	132%	20%	23%
RENT-BURDENED	35%	45%	44%

Source: American Community Survey 5-Year Estimates (2014–2018)

## Homeowners

	Downtown	City	Region
% RESIDENTS WHO OWN	12%	52%	66%
MEDIAN HOME PRICE	\$102K	\$134K	\$144K
MEDIAN PRICE CHANGE 2010–2018	38%	14%	18%
HOUSING-BURDENED	34%	29%	23%

Source: American Community Survey 5-Year Estimates (2014–2018)

# Vibrancy | Spending, Fun

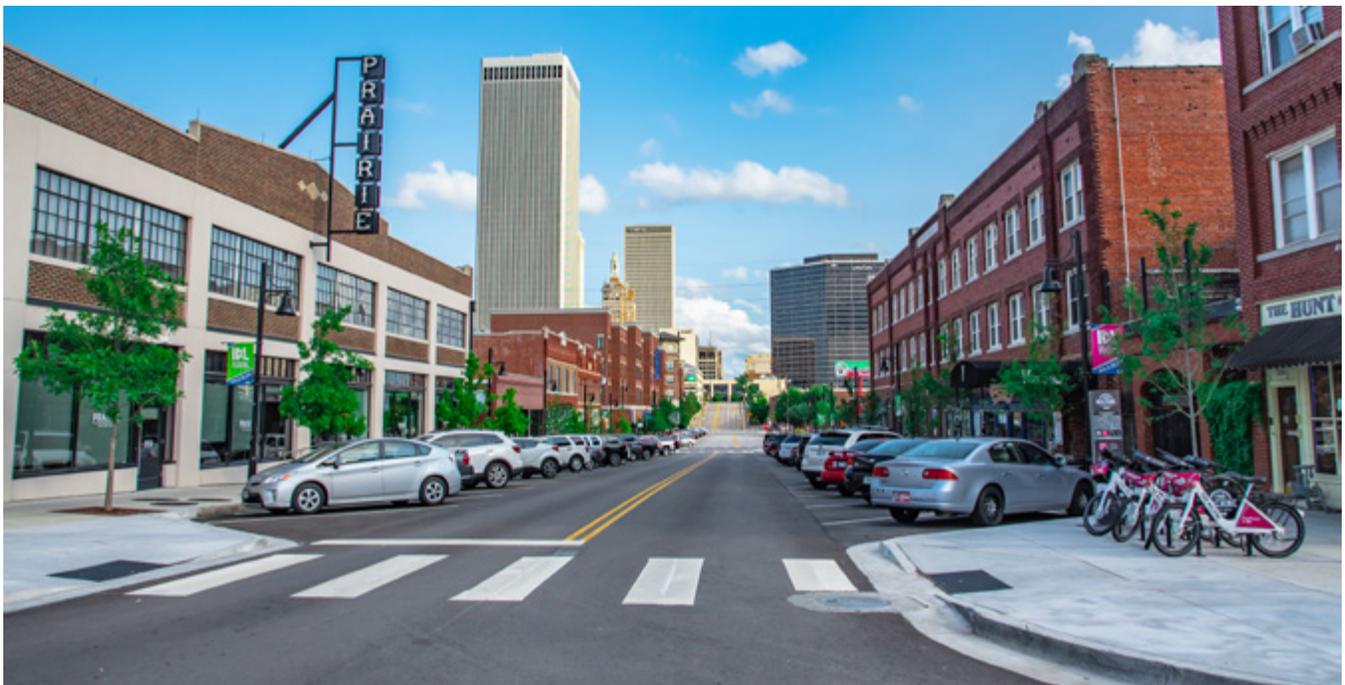
Due to their expansive base of users, downtowns and center cities can support a variety of unique retail, infrastructural, and institutional uses that offer cross-cutting benefits to the region.

Downtowns and center cities typically form the regional epicenter of culture, innovation, community, and commerce. Downtowns flourish due to density, diversity, identity, and use. An engaging downtown “creates the critical mass of activity that supports retail and restaurants, brings people together in social settings, makes streets feel safe, and encourages people to live and work downtown because of the extensive amenities.”<sup>12</sup> Physical distancing measures during the COVID-19 pandemic have only underscored the importance of a vibrant downtown with restaurants, concerts, outdoor events, and festivals. The revival of storefront businesses, event venues, and hotels will play an essential role in restoring a post-pandemic sense of vibrancy and normality.

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



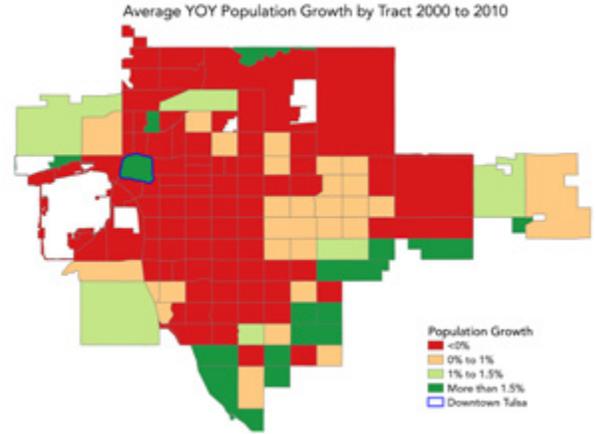
Source: U.S. Decennial Census (2010), American Community Survey 5-Year Estimates (2014-2018)  
\*Excludes group-quarters population



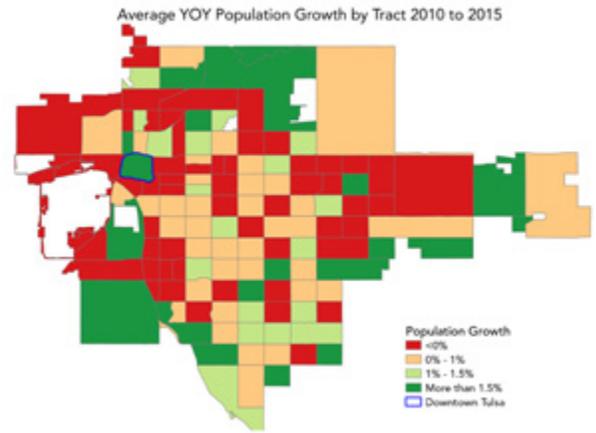
**Residential Growth**

Downtown’s population (excluding residents in group quarters) has grown much faster than in the city or region. Downtown has led population growth in the urban core for the last two decades. The maps here, showing growth in Tulsa over different time periods, illustrate how downtown’s success attracts growth to adjacent neighborhoods. Between 2000 and 2010 downtown looks like a green island of growth surrounded by stalled or declining census tracts. From 2010 to 2015 three adjacent census tracts north of downtown began to see new growth. Finally, between 2015 and 2018 the suburbs southeast of downtown began to see growth, too.

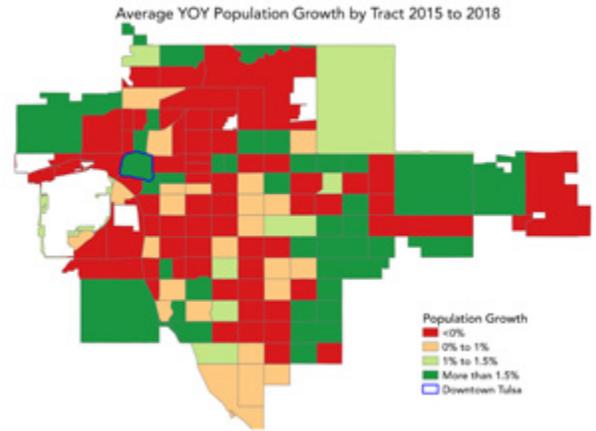
As mentioned in the Inclusion section, growing demand for housing downtown has led to significant construction of new housing. The Tulsa Downtown Coordinating Council estimates that downtown has a current total of 2,366 units, with another 1,356 slated for completion over the next three years. This trend shows the market responding to meet rising demand.



Source: IDA Analysis of U.S. Decennial Census (2000, 2010)  
\*Downtown excludes group quarters population.



Source: IDA Analysis of U.S. Decennial Census (2010) and American Community Survey 5-Year Estimates (2011–2015)  
\*Downtown excludes group quarters population.



Source: American Community Survey 5-Year Estimates (2011–2015) and American Community Survey 5-Year Estimates (2014–2018)  
\*Downtown excludes group quarters population.

### Retail Vitality

Typically, a downtown’s retail environment defines the heart of the community, serving as a key draw for residents, workers, and visitors. Downtowns have a much higher density of storefront retail than the rest of the city, creating a sense of vibrancy with places to go and things to interact with at a walkable scale. As a food and beverage destination, downtown Tulsa generates 6% of the city’s total food and beverage sales, and 92% of the money spent come from non-residents. More broadly, downtown generates around \$118 million in retail sales per square mile—almost three times the average square mile in the city. For food and drink specifically, downtown generates more than eight times more revenue per square mile. The concentration of restaurant and bar options in the Blue Dome and Tulsa Arts districts is a large contributor to their active and lively feel.

The number of hotels and hotel rooms speaks to downtown’s attractiveness to visitors. Around half sit in the Arena District near the BOK Center stadium, Cox Business Convention Center, Oklahoma State University Medical Center, and the county government buildings. Several more operate in the Deco District in the center of downtown. Finally, the three hotels not in those two districts have all opened since 2010 close to the most active parts of the Blue Dome, Greenwood, and the Tulsa Arts districts. They offer strong testimony to the growing attraction of these parts of downtown. Overall, downtown holds 14% of all city hotel rooms, again demonstrating its strong appeal for visitors.

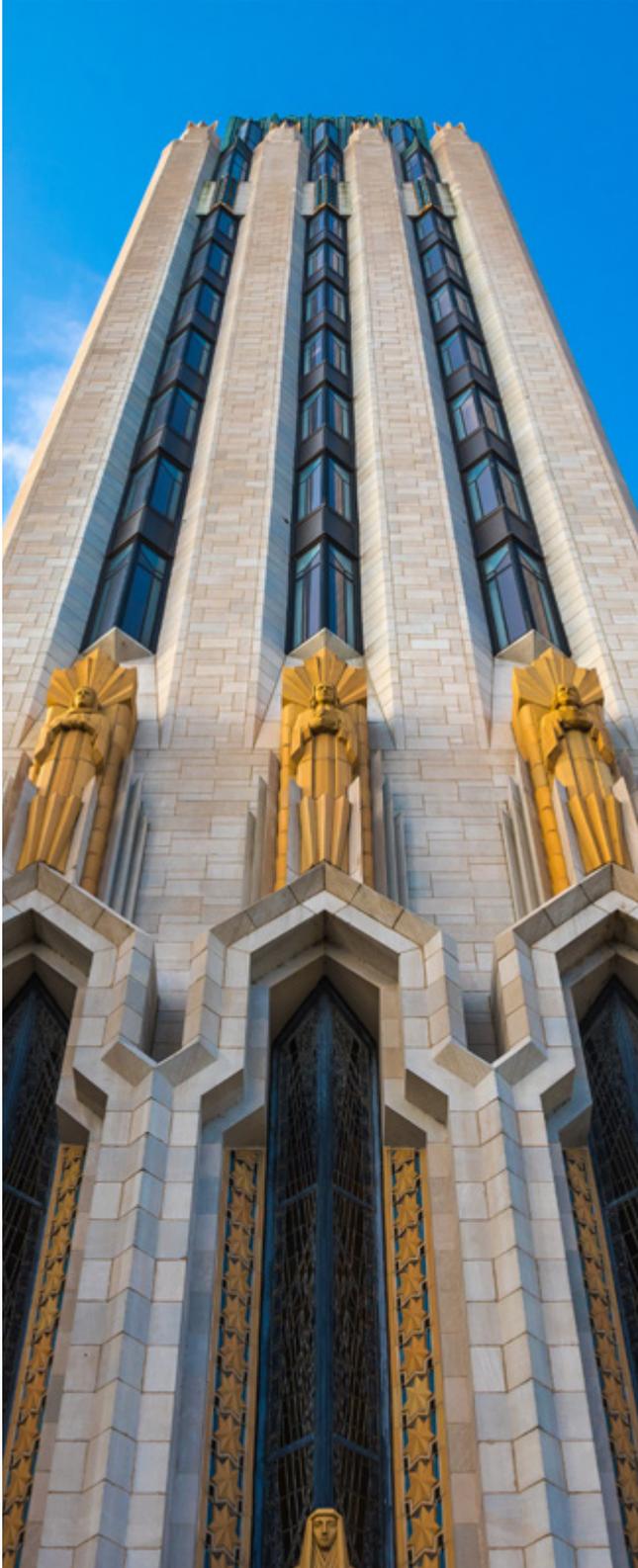


Source: ESRI Business Analyst (2017)



Source: ESRI Business Analyst (2017)



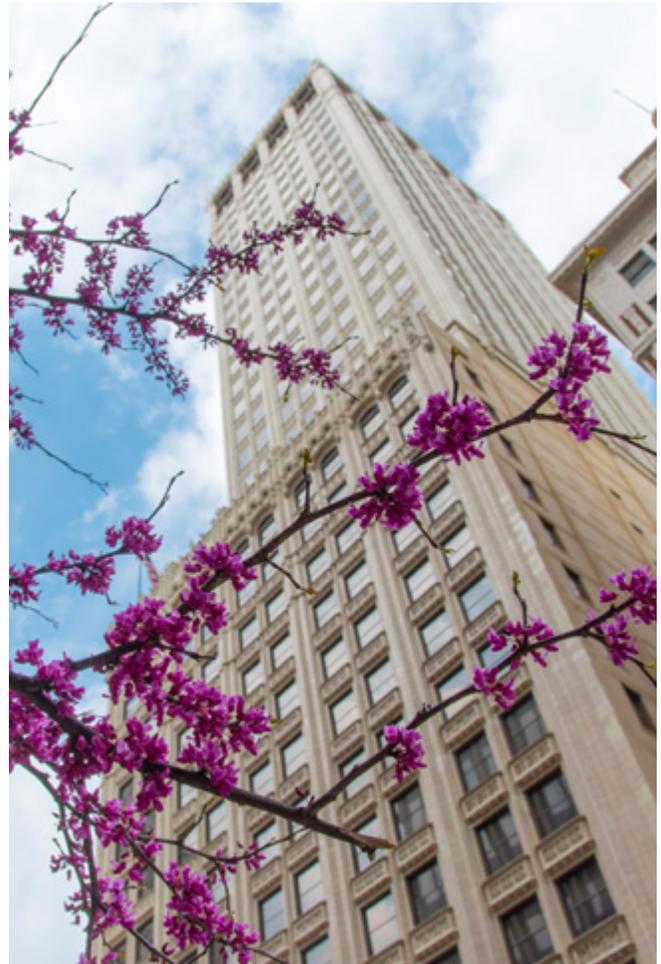


## Hotels

DOWNTOWN

HOTELS	13
HOTEL ROOMS	2,210
AVG OCCUPANCY	63.8%

Source: Tulsa Downtown Coordinating Council (2020)



## 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.”<sup>13</sup> The authentic cultural offerings in downtown enhance its character, heritage, and beauty, and create a unique sense of place not easily replicated in other parts of the city.

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



Downtown Tulsa comprises several distinct districts, each with its own identity. One of the oldest sections of the city, over the past 20 years the Tulsa Arts District has developed into a unique and buzzing community of creatives. As in many other arts districts, the historic red brick buildings began as warehouses. After a period of decline and neglect from the 1960s through the 1980s, revitalization began in the district, in part thanks to creation of Brady Village Tax Increment District Number One in 1993 and an extensive infill redevelopment plan released by the City of Tulsa in 2002. Since the early 2000s this area has gained momentum, filling previously underused space with restaurants, stores, bars, art studios, and a new hotel. Furthering its celebration of local creativity, the Oklahoma Museum of Popular Culture (OKPOP), under construction, will house “collections of Oklahoma creative artists from music, movies, TV and more.”<sup>14</sup>

The Historic Greenwood District has established another focal point of local identity, although it comes with a challenging history. A century ago, Greenwood was home to a thriving collection of black-owned small businesses popularly referred to as “Black Wall Street.” On May 31, 1921, after a fatal altercation over the trial of a black man, mobs of white residents carried out a vicious assault on the district—26 black residents are confirmed to have died but historians estimate the death toll may have reached as high as 300. Beyond the loss of life, the mob looted and burned Greenwood, leaving thousands homeless and causing tens of millions of dollars in property damage by today’s estimate. Erased from historical records for nearly 75 years, the story finally came to national attention in the mid-1990s. In 1997 the City created a commission to find a way to compensate and support surviving victims and their descendants. Today, the city continues to try to reach reconciliation through philanthropic projects. A museum and cultural center are set to open on the 100th anniversary of the massacre. These efforts help define a larger conversation about how best to address racial inequities.



**Live Events**

The addition of the \$39 million ONEOK Field has greatly boosted the number of visitors downtown. In its opening season in 2010, the stadium saw paid attendance of 408,000 just for Drillers baseball games. The stadium has hosted frequent viewing parties for sports and movies, even through the pandemic.<sup>15</sup> In a community survey on local perceptions of downtown, the stadium and the public library emerged as the most-loved in the heart of the city..

**Destinations and Unique Features**



24 56

HISTORIC STRUCTURES (NATIONAL)



6 135

PARKS AND NATURAL AREAS

■ Downtown ■ City

Source: Tulsa Downtown Coordinating Council (2020)

# 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 a city. The COVID-19 pandemic has brought resilience to the forefront of many people's minds. On the economic side, downtowns and their cities are able to mobilize to offer economic relief quickly. Over the longer term, downtowns have shown their ability to bounce back quickly from economic downturns. Social resilience means that residents have good access to necessary healthcare services and workers, but also that strong community ties enable both residents and businesses to turn to each other for support. The green spaces and trails that contribute to environmental resilience have seen renewed importance as safe outdoor respites during the pandemic. Each of these elements illustrates how downtown contributes to the holistic resilience of the community and city at-large.

## Economic Resilience

Diversity and economic vitality equip downtowns and center cities to adapt to economic and social shocks better than more homogenous communities. Similarly, density better positions downtowns and center cities to make investments needed to hedge against and bounce back from increasingly frequent environmental shocks and stresses. As described in the Economy section, downtown's primary economic sectors

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

include public administration, professional, scientific, and tech services, and utilities. This mix of industries positions downtown well to weather economic shocks and stresses, although a broad emergency such as COVID can still have a significant impact. Additionally, the fact that these three sectors account for less than 40% of downtown employment suggests a low level of dependence on any single sector that could leave downtown vulnerable to a sudden change of fortune.

Tulsa's history with the oil industry provides a clear illustration of the dangers of depending too heavily on a single industry. In many respects the oil industry built downtown Tulsa in the early 1900s and maintained a strong presence for decades before the sudden and severe oil bust in the early 1980s. While Tulsa still has a significant number of oil-related jobs, the economy has diversified significantly in the years since.<sup>16</sup>

## Social Resilience

Downtowns act as hubs for social resilience. Their dense nature means that a diverse mix of residents and employees have access to a multitude of community resources in a small area. With six parks and natural areas, a library, and

## Downtown Community Resources



1

LIBRARY



1

RECREATION AND  
COMMUNITY  
CENTER

8

RELIGIOUS  
INSTITUTIONS

6

PARKS AND  
NATURAL AREAS

1

POSTSECONDARY  
INSTITUTIONS

Source: Tulsa Downtown Coordinating Council (2020)

a community center, residents, employees and visitors can meet, learn, and participate in civic life in multiple places. As downtown population grows, so will the need and demand for community space to serve an expanding pool of residents.

Homelessness stands as a chronic challenge for urban places, which often lack sufficient resources to aid people experiencing homelessness. Several shelters in downtown provide aid to Tulsans in need, and, as mentioned throughout this report, their residents represent a significant proportion of the downtown population. Though most live in institutional settings, in 2010 more than 700 people lived in noninstitutional group quarters such as group homes for adults, residential treatment facilities, religious group quarters, and similar facilities. These community resources care for an often-neglected demographic group.

Social resilience also means having a healthy population, a critical foundation in a public health crisis. Downtown comes very close to the citywide rate for residents with health coverage. Yet it also has one of the highest rates of uninsured residents, at 18%, of all cities in this study, a figure 10 percentage points higher than the median for all study areas. Oklahoma City has the same uninsured rate; only El Paso has more residents not covered by health insurance. On recreational physical activity, downtown again nearly ties citywide rates but falls closer to the overall study median.

In the new COVID reality, access to a computer and internet has become critical for people who need to work from home or have their children attend classes online. Currently 21% of downtown households do not have access to a computer and 12% do not have internet access. Compared to other downtowns in the study, Tulsa falls on the higher end of the scale for lack of computer access, but near the middle of the pack for internet access.

### Environmental Resilience

Downtown households generate significantly less in greenhouse gasses than households citywide or regionally. Overall, fewer residents drive alone to work compared to the city and region, and that percentage has stayed fairly consistent since 2010. During that time the percentage of downtown residents commuting to work on transit dropped (even as the total population increased), and the number walking doubled.

## Access to Economic Opportunity

	Downtown	City	Region
RESIDENTS IN POVERTY	31%	20%	15%
HOUSEHOLDS WITHOUT A HOME COMPUTER	21%	12%	11%
HOUSEHOLDS WITHOUT INTERNET ACCESS	12%	10%	10%

Source: American Community Survey 5-Year Estimates (2014–2018)



## Health

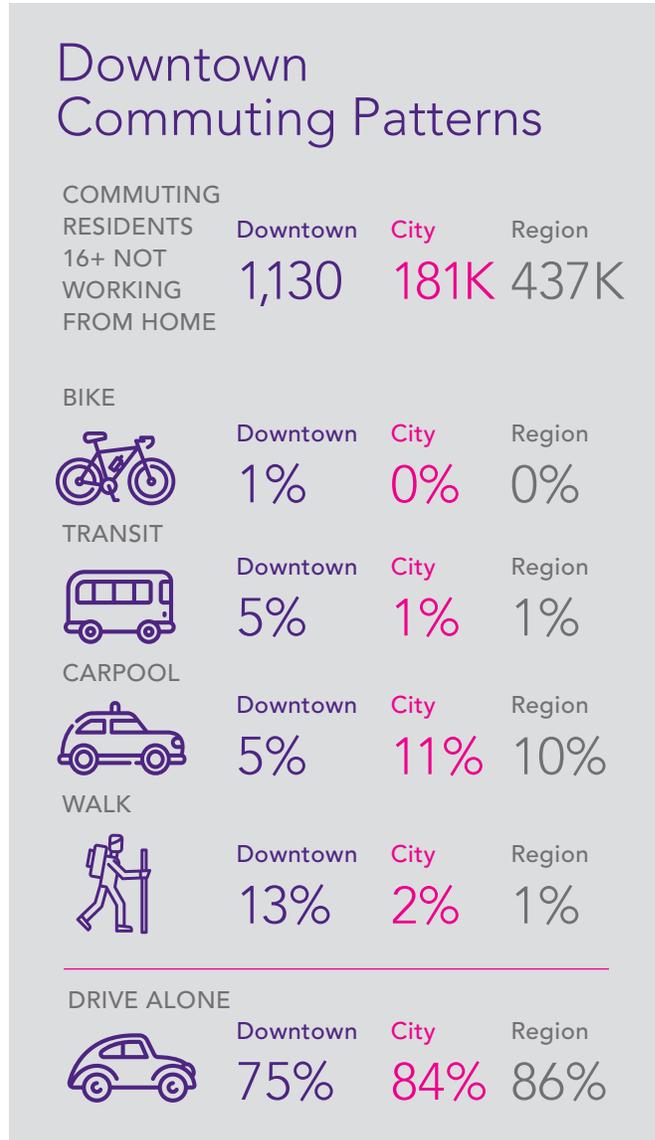
	DOWNTOWN	CITY	REGION
NO LEISURE-TIME PHYSICAL ACTIVITY	35%	34%	0%
WITHOUT HEALTH INSURANCE COVERAGE	18%	17%	13%

Source: American Community Survey 5-Year Estimates (2014–2018), CDC: 500 Cities Project (2017)

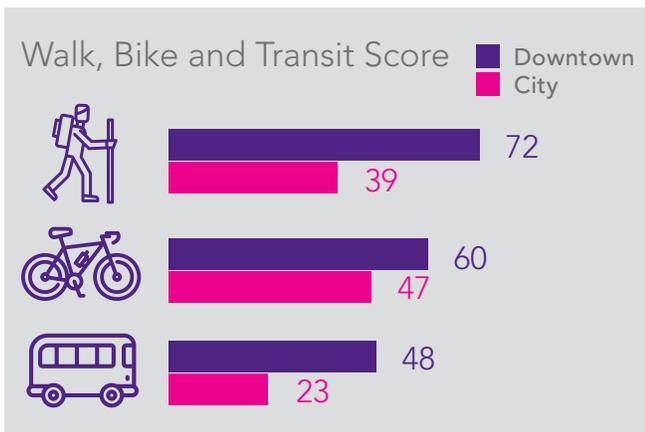


Source: Tulsa Downtown Coordinating Council (2020), Center for Neighborhood Technology (2017)

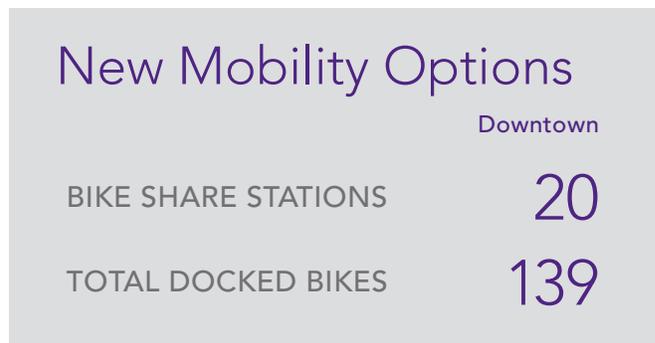
Tulsa Transit recently launched its Aero Bus Rapid Transit route, which mainly runs north to south along Peoria Avenue east of downtown and includes three stops that serve riders in downtown. Though we don't have enough data to say how this will affect commuting patterns in Tulsa, similar BRT programs have proved highly successful in other parts of the country and abroad. Featuring modern buses with WiFi and sheltered stations with power outlets, Aero aims to create a high-quality public transit option for commuters and visitors.



Source: American Community Survey 5 Year Estimates (2014–2018)



Source: Walk Score (2019)



Source: Tulsa Downtown Coordinating Council (2020)

# Downtown Profile | Summary

Using data collected for *The Value of U.S. Districts and Center Cities* study, we identified three tiers of districts, defined by 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 rate of growth in population and jobs from 2000 and 2018.

We identified Tulsa as an “Emerging” downtown, meaning it has room to grow in terms of densifying and concentrating value within the city. While the non-group quarters population has seen encouraging growth, employment numbers don’t look much different from 2004. This stalled employment growth kept downtown from the “growing” tier. To join that tier, downtown employment would have needed to have grown by 23% since 2002. Within the Emerging tier a few other downtowns had similar characteristics and growth trends, including Wichita, KS; Oklahoma City; and Lancaster, CA.

In many respects Emerging downtowns have the greatest potential of the tiers. Relative to property values in the dense Established downtown markets, or the highly speculative Growing downtown markets, Emerging markets tend to have lower land costs. Investments in downtown now could pay off handsomely in the future if residential appetite stays high and downtown adds more jobs—boosting downtown Tulsa into the Growing tier alongside some of the nation’s fastest-growing markets.

Compared to other Emerging downtowns, Tulsa’s strength lies in its attractiveness to visitors and new residents. Downtown boasts more hotels and hotel rooms than most of its tier peers, and an estimated 92% of dollars spent on food and beverage in the study area comes from people who don’t live there. In addition, the strength of downtown amenities that attract visitors, like arts and culture, also serves as a draw for new residents, resulting in a population growth rate more than double the tier’s median.

## Emerging Downtowns

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

Average of **2%** of citywide land area with an aggregate assessed value of **\$1.4 billion** (6% of citywide assessed value) and accounts for:

	DOWNTOWN TULSA	EMERGING DOWNTOWNS
CITYWIDE POPULATION	0.4%	2.4%
18- TO 34-YEAR-OLDS LIVING CITYWIDE	1.6%	3.5%

## RESIDENTS



<b>GROWTH</b> AVG. 2000 – 2018	43%	21%
<b>DENSITY</b> RESIDENTS / ACRE	2	6
<b>MEDIAN INCOME</b> HOUSEHOLD	\$38K	\$36K
<b>DIVERSITY INDEX</b>	66.0	64.3

DOWNTOWN  
TULSA

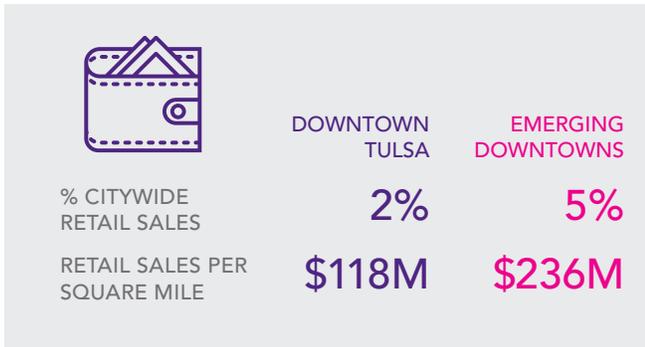
EMERGING  
DOWNTOWNS

Hollywood excluded from population density from Emerging as outlier

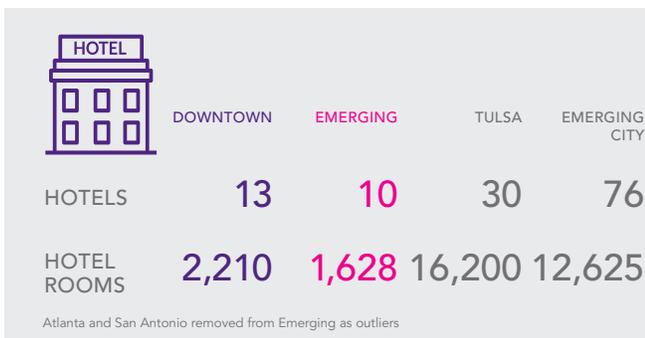


## EMPLOYMENT

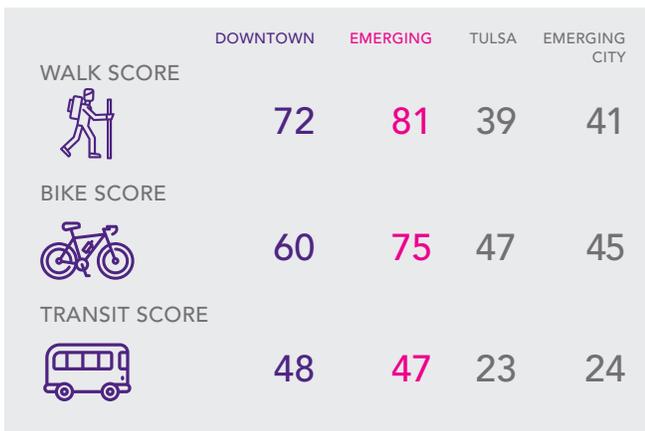
	DOWNTOWN TULSA	EMERGING DOWNTOWNS
GROWTH IN DOWNTOWN EMPLOYMENT (2002–2017)*	-13%	-6%
CITYWIDE JOBS	12%	15%
CITYWIDE KNOWLEDGE JOBS	14%	18%
CITYWIDE CREATIVE JOBS	11%	17%
RESIDENTS WITH A BACHELOR’S DEGREE OR HIGHER	22%	36%



Data in the Resilience section shows Tulsa with lower-than-average shares of citywide resources, but this reflects downtown’s compact size—it occupies one of the lowest proportions of any city’s footprint in the study. Within the tier, downtown San Antonio and Hollywood (within Los Angeles) have similarly low shares of citywide land, and both also compared poorly to peers on the “percent of citywide” resources measurements. In fact, compared to other study areas that consist of less than 1% on their city’s land area, Tulsa scores similarly on these comparisons.



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



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



APPENDICES

PROJECT  
METHODOLOGY

PRINCIPLES AND  
BENEFITS

DATA SOURCES

ADDITIONAL IDA  
SOURCES

BIBLIOGRAPHY



# Appendix I: Project Framework and Methodology



## BACKGROUND

In 2017, IDA launched the Value of U.S. Downtowns and Center Cities study. IDA staff and the IDA Research Committee worked with an initial group of 13 downtown organizations, Stantec's Urban Places as a project advisor, and HR&A as an external consultant to develop the valuation methodology and metrics. Since 2017, IDA has added another 20 downtowns or urban districts to the study database, and worked with their respective urban place management organizations (UPMOs) to collect local data, obtain data from agencies in their cities, and combine these metrics with publicly available statistics on demographics, economy, and housing. Data collected included publicly available census figures (population, demographics, employment, transportation), downtown economic performance, municipal finances, capital projects, GIS data, and the local qualitative context. The 33 downtowns and urban districts studied to date represent diverse geographic regions and have relatively comparable levels of complexity and relationships to their respective cities and regions.

Guiding questions for this project included:

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



## PROJECT PURPOSE

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

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

## THE FIVE PRINCIPLES



## What factors make a vibrant downtown?

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



### DETERMINING PRINCIPLES FOR A VALUABLE DOWNTOWN

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

Downtown advocates tailor their advocacy to the interests of different audiences. For instance, the figure for sales tax revenue generated downtown would have resonance for government officials but likely wouldn't hold much interest for visitors and workers. For these audiences, a UPMO might assemble data showing the types of retail available downtown, whether the offerings meet user needs, and how fully residents, workers, and visitors use these retail establishments. The study team sought arguments that would appeal to multiple audiences and worked to identify metrics that could support multiple statements about downtown value. The workshop identified these value statements:



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

## METRICS SELECTION

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

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

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

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

The study team analyzed metrics and comparisons to develop value statements about each downtown or district. Three types of data fully illustrate each argument:

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

For example, under economy, a UPMO might want to make the argument that a thriving financial services sector plays a critical role in the city's economy. The number of financial services jobs, the share of the city's financial services jobs located downtown, and the number/list of large financial services companies headquartered downtown will help make the case that downtown has great importance to that sector and therefore the city.

2. **Indicators** measure an argument at a secondary level by focusing on inputs or outputs and may reflect the subject geography or serve as benchmarks for



comparison to peer downtowns or case studies of best practices.

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

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

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

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



## DEFINING DOWNTOWN

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

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

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

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

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

## PROJECT PROCESS

### DATA COLLECTION

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

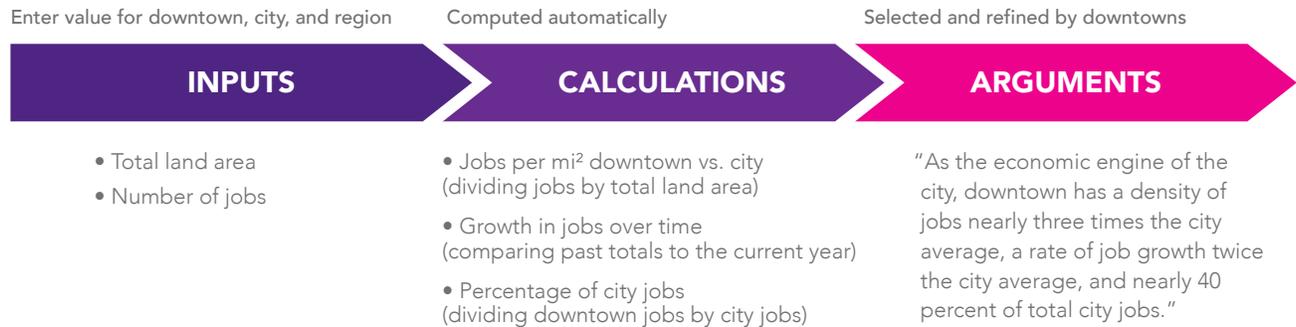
### CALCULATIONS AND ANALYSIS

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

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

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





## BENCHMARKING TIERS

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

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

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

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

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

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

# Appendix II: Principles and Benefits

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

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



## Illustrative metrics:

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

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

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



**Illustrative metrics:**

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

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

The ability of vibrant places to attract visitors and new residents, as well as a regionwide consumer base, creates value. Vibrancy is the buzz of activity and excitement that comes with high-quality experiential offerings like breweries, restaurants, theatres, or outdoor events. As the cultural center of its city, downtown typically attracts a large share of citywide visitors and holds a large share of citywide hotels and hotel rooms. An engaging downtown “creates the critical mass of activity that supports retail and restaurants, brings people together in social settings, makes streets feel safe, and encourages people to live and work downtown because of the extensive amenities.”<sup>1</sup>



**Illustrative metrics:**

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

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

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

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



#### Illustrative metrics:

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

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

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



**Illustrative metrics:**

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

# Appendix III: Data Sources

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

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

# Appendix IV: Selected Study Definitions

## Assessed value

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

## Acreage of open space

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

## Census block group

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

## Census tract

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

## Creative jobs

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

## Development pipeline

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

## Diversity Index

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

## Employment

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

## Event venue

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

## Farmers markets

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

## Greenhouse gas emissions

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

## Housing and Transportation Index

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

## Knowledge jobs

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

## Media mentions

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

**Middle-class**

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

**Millennial**

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

**No leisure-time physical activity**

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

**Private investment**

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

**Public art installations**

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

**Public investment**

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

**Rent-burdened**

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

**Retail demand**

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

**Retail sales**

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

**Sales to non-residents**

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

**Sports teams**

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

# Additional IDA Sources

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

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

format grocery stores; amount invested in parks and public realm; and number of annual cultural events and festivals.

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

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

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

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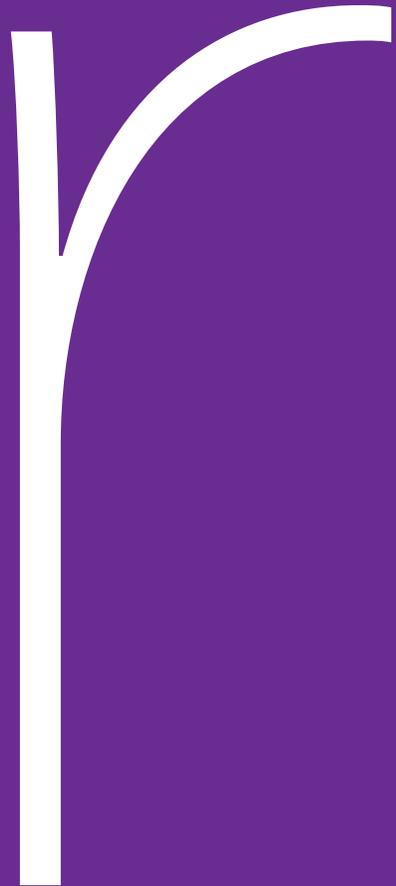
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