

The Value of Downtowns: Comparisons

A COMPARATIVE ANALYSIS OF DOWNTOWN BALTIMORE, MARYLAND
A 2021 IDA STUDY

A 2021 PUBLICATION CREATED BY
THE INTERNATIONAL DOWNTOWN ASSOCIATION



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ABOUT IDA



IDA

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

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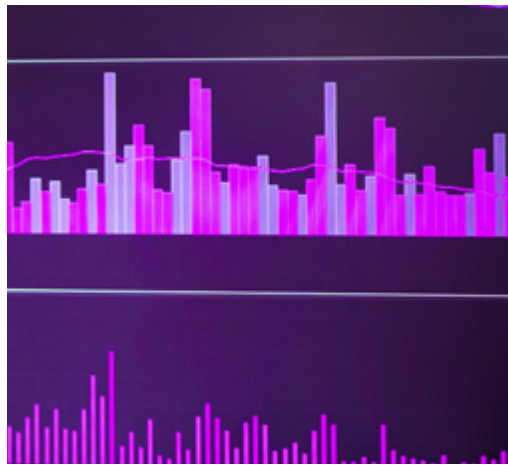
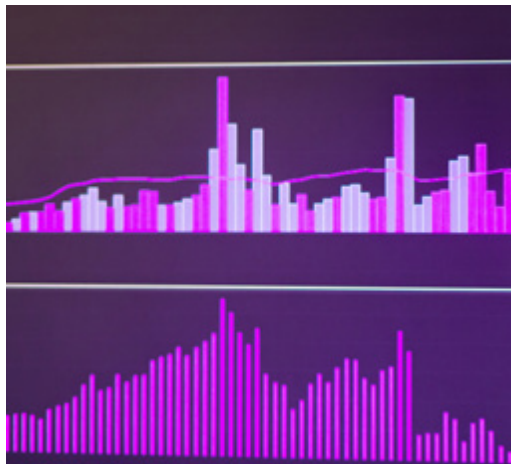
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THE VALUE OF DOWNTOWNS: COMPARISONS



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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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COMPARATIVE
ANALYSIS

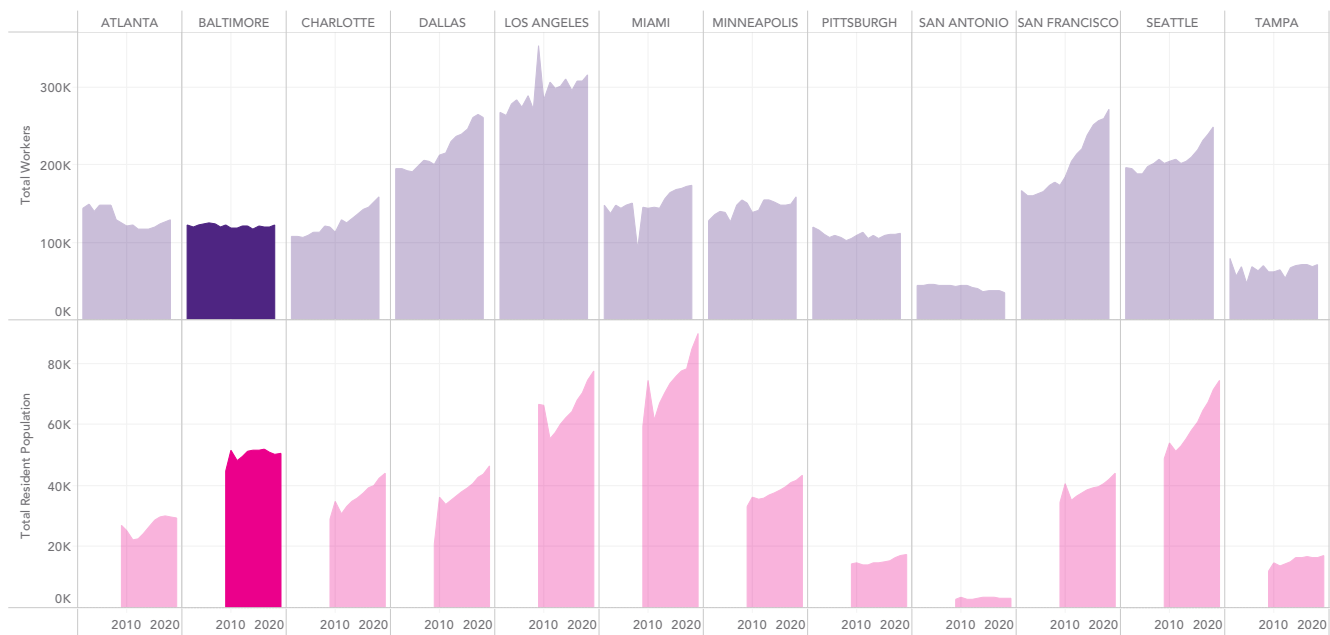


Overview

Downtown Baltimore is a large, concentrated economic and residential urban core. It contains high numbers of residents and jobs—8.3% and 38% of the citywide totals for those categories respectively. This density plays a central role in “fostering economic growth, social capital and civic engagement, and healthier, more sustainable communities.”¹ Despite the changes that the pandemic has brought to dense downtowns and urban districts, as recovery begins to take shape, downtowns will continue to serve as the heart of the city. Leading urban thinkers, such as Richard Florida, argue that “given their strategic locations at the very center of major metro areas, Central Business Districts are perfectly positioned to be remade as more vibrant neighborhoods where people can live and play as well as work.”²

Compared to its peers among the 25 largest U.S. metros, and among established tier downtowns, downtown Baltimore ranks right at the average across multiple metrics, sitting in the middle of the pack due to its relative stability. While jobs and population haven’t declined, downtown also hasn’t seen major growth in those areas the way several large-metro peers have. As the pandemic recovery accelerates and workers and employers embrace greater work flexibility, competition for talent among cities will only become fiercer. Yet downtown Baltimore may stand well-poised to attract and retain residents and jobs by showcasing its abundant urban amenities and emphasizing its affordability and inclusivity.

Study Area Worker and Resident Population Change Over Time Across Large Metro Peers



Source: Worker data from On the Map (2002–2018); Population figures from U.S. Decennial Census (2010) and American Community Survey 5-Year Estimates (2009–2019).

Methodology

This comparison assesses how downtown Baltimore performs on key metrics across the principles of economy, inclusion, vibrancy, identity, and resilience. It compares downtown to its peers using three distinct approaches:

1. All Value of Downtowns Participants

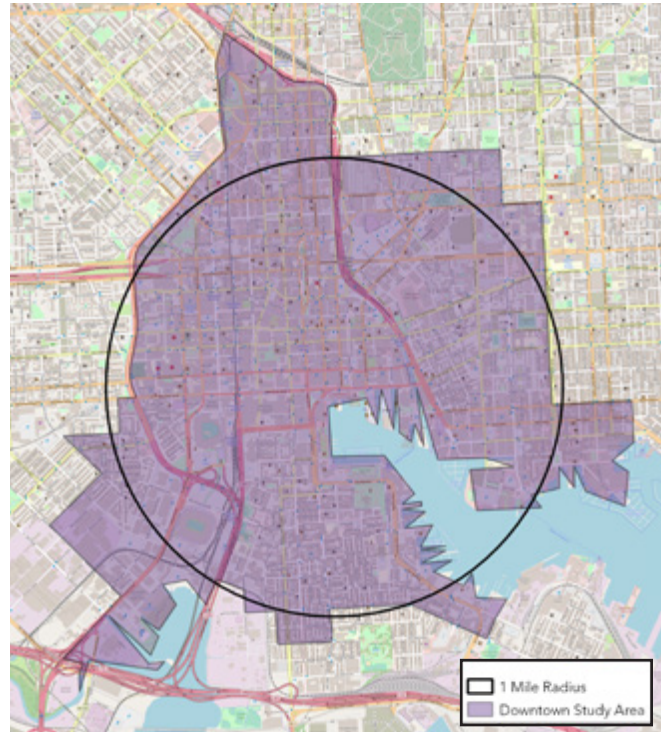
IDA has conducted its *Value of US Downtowns and Center Cities* analysis for more than five years. To date, the study has collected extensive data on more than 40 downtowns and commercial districts across the country, creating the basis for this comparisons report. The full list of downtowns and their tier classification appears in the Appendix.

2. “Established” Tier

The *Value of U.S. Downtowns and Center Cities* study series uses the collected data to identify three tiers of districts, defined by their stage of development. Baltimore ranks among the “established” tier. These districts have a high proportion of citywide significance in terms of jobs and population (they average 9% of their city’s population and 40% of jobs) and have high density. Most established districts continue to grow in both population and jobs, although more slowly than districts in the growing tier. They also tend to cover a larger proportion of citywide land area.

3. Large Metros

The Downtown Partnership of Baltimore typically compares the one-mile radius of its district to the one-mile radius of the downtowns in the 25 largest metros in the U.S. The IDA database contains 12 of these large metros, and in this analysis, the term *large-metro downtowns* refers to those 12. It’s important to note that IDA does not use the Partnership’s one-mile-radius definition of downtown. IDA works with each partner organization to create a custom geography that best fits each city’s definition of downtown. The accompanying map illustrates the downtown study area that we used in this study, and the one-mile-radius definition of downtown that the Partnership typically uses.



Note: Nearly all data are pre-pandemic, apart from real estate figures. These data show the trajectory for downtown Baltimore and peer downtowns prior to COVID-19. The specifics of the recovery could affect patterns of growth in downtowns, but on balance we expect a resumption of trends that prevailed up to 2020.

The Value of Downtowns Principles

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.

Economy

Downtowns play a central role in the regional economy due to their concentration of employment, commercial real estate, and tax-revenue generation. Given its relatively small size (about three percent of all citywide land), the average downtown contains one-quarter of a city's jobs, contributes 17% of property tax revenue, and commands the city's highest commercial real estate values per square foot.



Employment

	DOWNTOWN BALTIMORE	ESTABLISHED DOWNTOWNS	LARGE-METRO DOWNTOWNS	AVERAGE OF ALL DOWNTOWNS
GROWTH IN EMPLOYMENT (2002–2018)	0%	20%	15%	9%
CITYWIDE JOBS	38%	41%	33%	22%
CITYWIDE KNOWLEDGE JOBS	45%	45%	42%	25%
CITYWIDE CREATIVE JOBS	71%	40%	38%	30%
RESIDENTS WITH A BACHELOR'S DEGREE OR HIGHER	57%	55%	53%	47%

Source: LEHD On the Map (2018) and American Community Survey 2014–2019

In Baltimore, downtown is a clear economic center, with 38% of the city's jobs. This stands far above the average downtown and slightly above peer large-metro downtowns.

Downtown contains almost half of the city's knowledge jobs, on par with both established and large-metro downtowns. Knowledge jobs include those in finance and insurance; real estate; management of companies and enterprise; professional, scientific and technical services; information; and health care and social assistance. According to research from the Brookings Institution, these sectors, particularly in "information, finance, and professional and business sectors demonstrated both strong job growth and a consistent preference for downtowns."³

Compared to other large metros, downtown Baltimore has the highest concentration of citywide finance and insurance jobs (79%) and has more than half of the city's jobs across six industries (creative, finance, information, management of companies and enterprises, professional, scientific and technical services, and public administration). Early trends indicate that these sectors, "despite having jobs with a high potential for remote work [...] tend to require more office time,"⁴ which will help revitalize downtown Baltimore as employers begin adopting return-to-office policies.

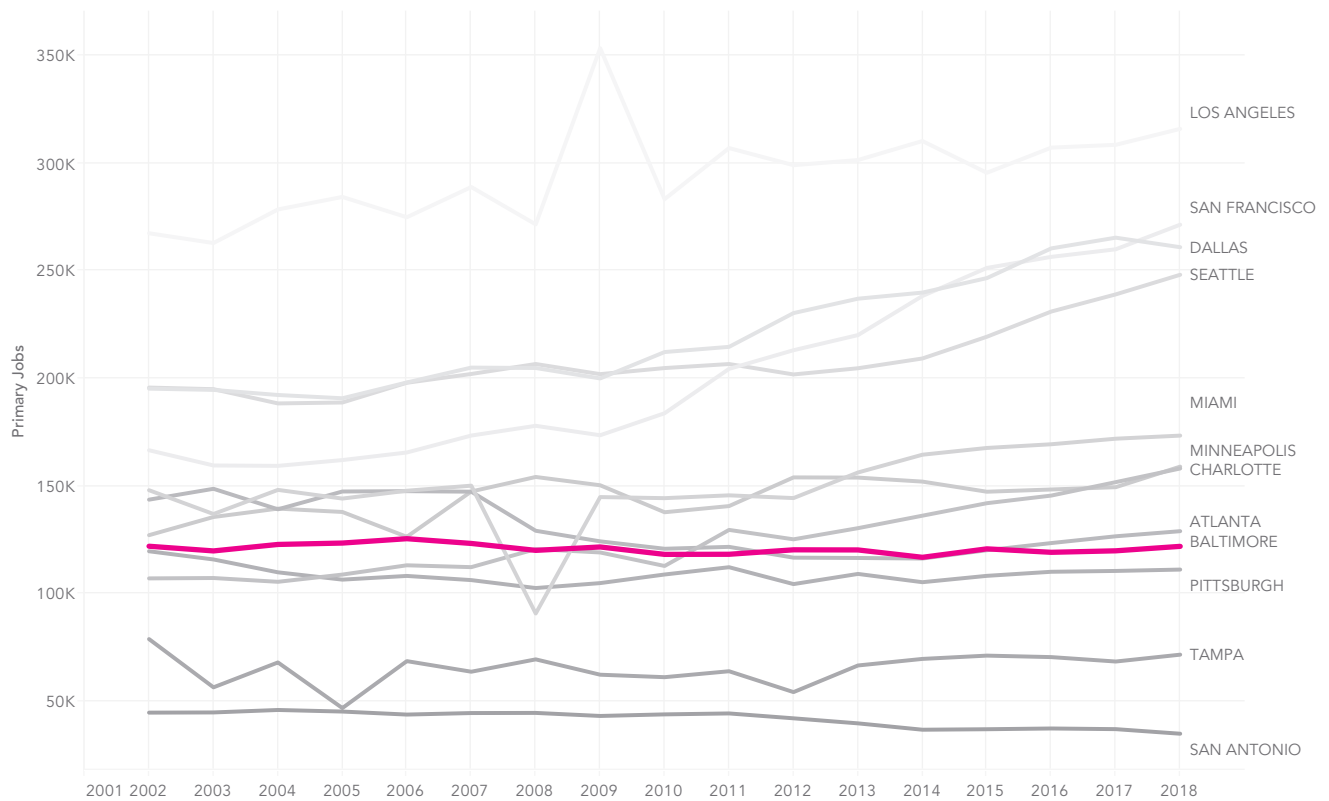
Downtown also has a high concentration of the city's creative jobs. With more than 4,000 jobs representing 71% of citywide creative jobs, downtown claims more of this sector than any other downtown in our study except for downtown Cleveland, with 77% of its citywide creative jobs.

Job Growth

While downtown Baltimore does hold a large share of citywide jobs, it has experienced virtually no job growth over the past two decades. During this same period, jobs citywide increased by 8% and, at 17%, even more strongly within the region—underscoring how job growth has stalled in downtown.

On average, large-metro downtowns grew by 15% in the same period, and established downtowns grew at an even stronger 20% rate. Los Angeles, San Francisco, Seattle, and Dallas, which have the largest number of downtown jobs, experienced explosive job growth over the past 20 years.

Total Primary Jobs in Large Metro Downtowns (2002–2018)



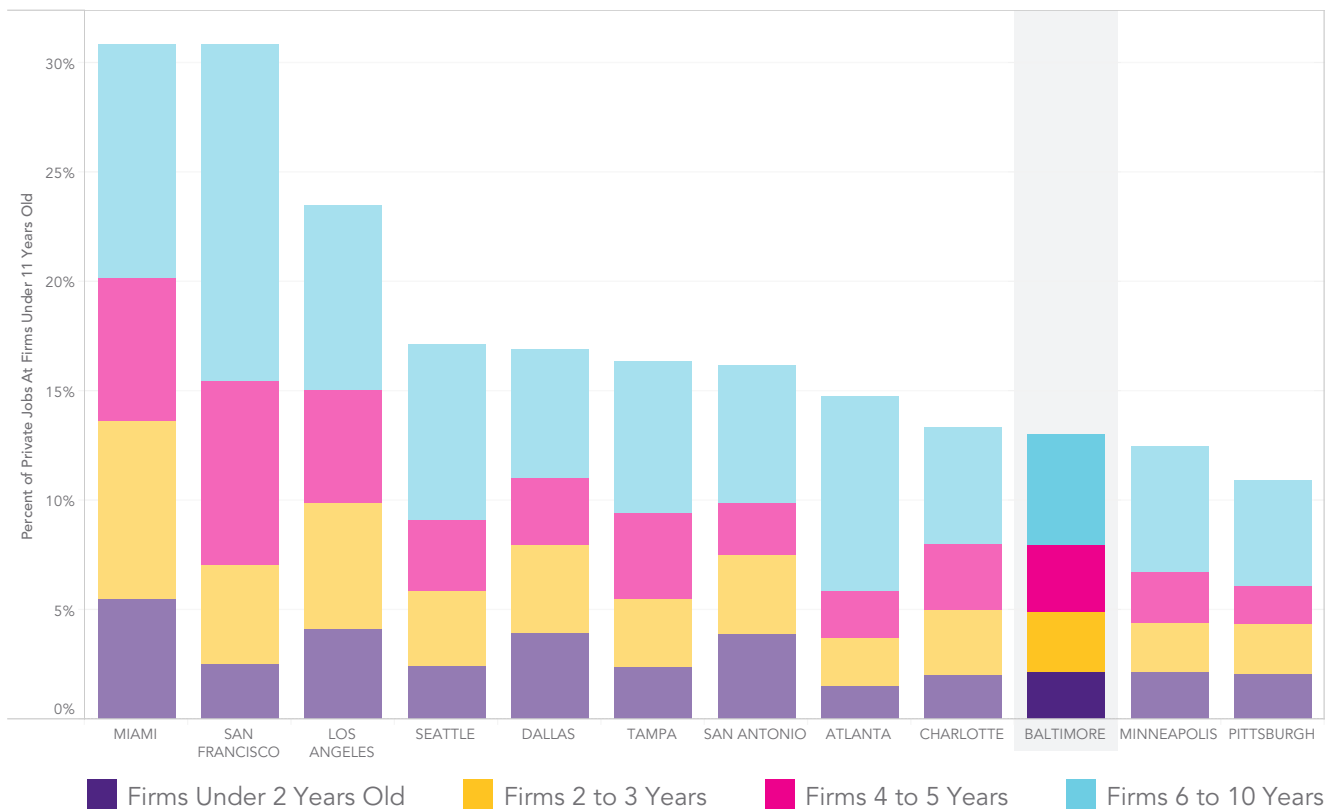
Source: LEHD On the Map 2002–2018

Firm Size and Age

Focusing on private jobs provides a clearer picture of the business environment. In downtown Baltimore, large firms (staff size greater than 500 employees) account for 63% of private jobs, or about 60,000 jobs. The smallest firms (those with fewer than 20 employees), account for just 10% of private jobs. These ratios are about average across large-metro downtowns, the established tier, and all downtowns in this study.

Established firms (more than 11 years old) account for the vast majority of private jobs; only 8% of jobs are in firms less than 5 years old. This is fairly typical among large metros, with the exceptions of startup-rich San Francisco and Miami.

Jobs by Firm Age

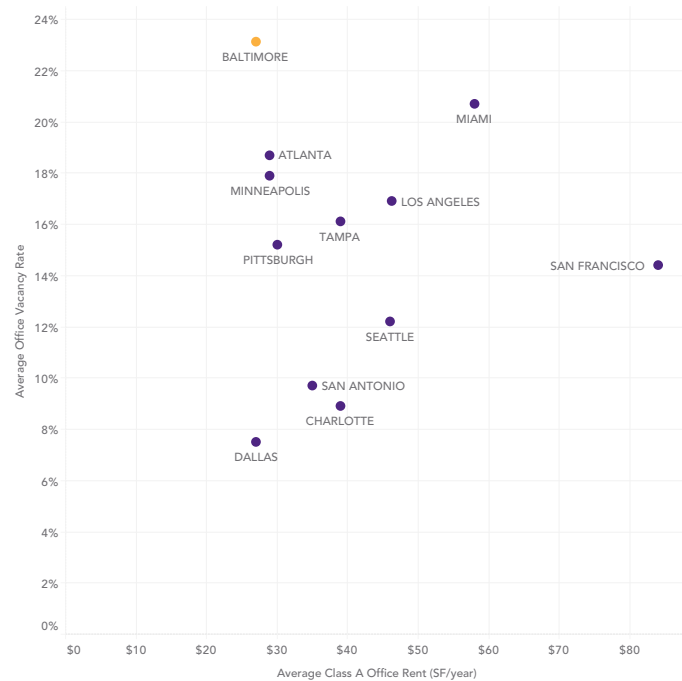


Source: LEHD On the Map (2018)

Office Rents (2020–2021)

Compared to other large metros, downtown offers extremely affordable office rents. At \$27/sq ft, downtown's office space costs less than in any other large metro except for Dallas, which boasts the same rate, and Los Angeles. Low rental costs, however, belie a high vacancy rate. At 24%, downtown Baltimore has the highest vacancy level of all large metros.

Office Rents (2020–2021)



Source: All rents and vacancies are the most recent available in each downtown, which could be from Q1 2021 or Q4 2020. Sources include JLL, CBRE, Downtown LA, Charlotte Center City Partners, Centro San Antonio, Downtown Pittsburgh Partnership, Central Atlanta Progress, Downtown Partnership of Baltimore, Downtown Seattle Association, and Downtown Dallas, Inc.

Assessments

Despite being a center of the citywide economy, downtown Baltimore's assessed value ranks lower than average across all study downtowns. Nevertheless, its percentage of citywide assessed value ranks fairly high, on par with the established downtowns' average. Assessment formulas vary in each city, which also contributes to a large variance in the total assessed value per downtown.



Land Value and Assessment

	DOWNTOWN BALTIMORE	ESTABLISHED DOWNTOWNS	LARGE-METRO DOWNTOWNS	AVERAGE OF ALL DOWNTOWNS
AVERAGE ASSESSED VALUE	\$5.7M	\$19.8M	\$13.5B	\$6.3B
OF CITYWIDE ASSESSED VALUE	20%	21%	16%	14%

Source: Assessor's Office in each of our UPMD partners city or county.

Inclusion

As the economic center and heart of the city, a downtown must include all populations and represent the city around it. Downtowns and center cities provide access to opportunities and essential services for diverse users, positioning them as highly inclusive urban nodes. On average, residents of study downtowns are 46% nonwhite and 18% foreign-born; 48% hold a bachelor's degree or higher. In most downtowns a large share of the population is between the ages of 18 and 34, on average accounting for 41% of residents.



Residents

	DOWNTOWN BALTIMORE	ESTABLISHED DOWNTOWNS	LARGE-METRO DOWNTOWNS	AVERAGE OF ALL DOWNTOWNS
% OF CITYWIDE POPULATION	8%	9%	7%	4%
% OF CITYWIDE 25-TO-34-YEAR-OLDS	15%	14%	10%	5%
POPULATION GROWTH AVERAGE 2000–2019	7%	43%	51%	22%
DENSITY RESIDENTS / ACRE	21	26.4	20	7
DIVERSITY INDEX	64.4	66.2	67.5	64

Source: American Community Survey 2014–2019 and ESRI Business Analyst

Population Change

Baltimore has the fourth-largest downtown population in our dataset, at around 50,000 residents, and hosts a share of citywide population similar to other downtowns in the established tier (8.3% compared to an average of 9%). However, population grew minimally, just 7%, in the past two decades. Downtown started with a relatively high population in 2000, which helps explain some of the low growth rate, but Miami and Seattle had downtown populations similar to Baltimore's in 2000, yet their populations grew by 92% and 66% respectively over the past two decades.

Total Population and Growth



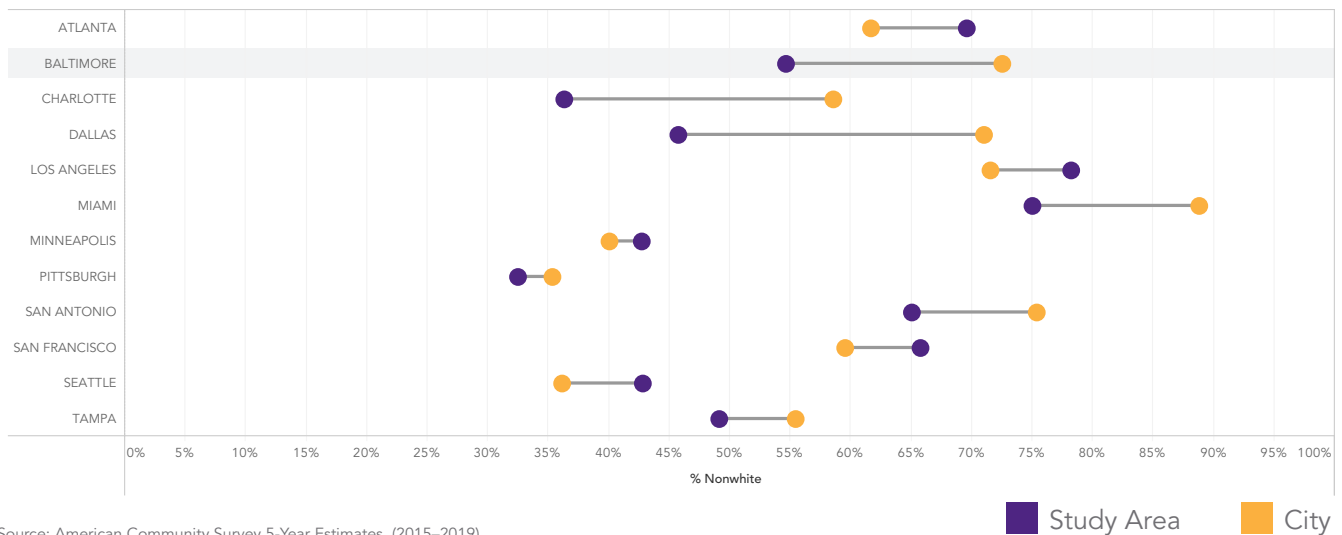
Source: U.S. Decennial Census (2000); American Community Survey 5-Year Estimates (2015–2019)

Race and Diversity

Downtown residents comprise a mix of racial groups: 45% are White, 39% Black, 6% Asian, and 6% Hispanic or Latino. This mix gives downtown a 64.4 score on the diversity index, which means that any two residents downtown have a 64% chance of identifying as different races or ethnicities.

While diverse, many downtowns also strive to have a resident population that reflects the city around them. Compared to the other large metros, Baltimore falls short here. Seven out of the 12 large metros have a lower proportion of nonwhite residents than their respective cities, but Baltimore has one of the biggest gaps – 55% of downtown residents identify as nonwhite, compared to 73% citywide. At the other extreme, 70% of Atlanta’s downtown residents identify as nonwhite, compared to 62% citywide, the largest such differential in this group.

Percentage of Nonwhite Residents Downtown and Citywide



Income and Affordability

The median household income in downtown sits slightly above the medians for established and large-metro downtowns. The figure increased 42% between 2009 and 2019, a relatively low rate of growth. The average large-metro downtown saw an 85% rise in median income over the same period; only Atlanta (32%) and Dallas (39%) grew more slowly.

Compared to other urban cores, downtown offers more affordable rent and housing prices. With a lower median home price than any other downtown, Baltimore has the potential to be more inclusive of all populations, especially since its home-ownership rate exceeds 25%.

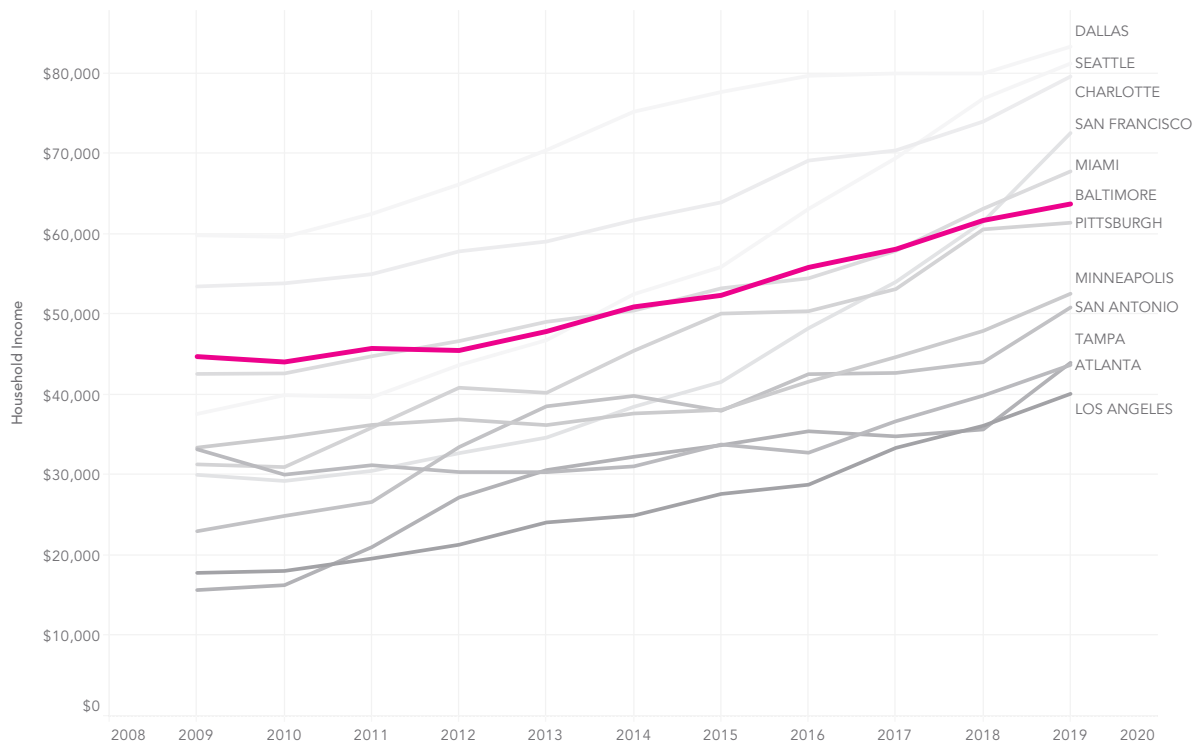


Income and Housing

	DOWNTOWN BALTIMORE	ESTABLISHED DOWNTOWNS	LARGE-METRO DOWNTOWNS	AVERAGE OF ALL DOWNTOWNS
MEDIAN HOUSEHOLD INCOME	\$63,737	\$63,546	\$61,738	\$43,485
MEDIAN RENT	\$1,306	\$1,433	\$1,358	\$1,086
MEDIAN HOME PRICE	\$292,705	\$446,915	\$44,305	\$314,129

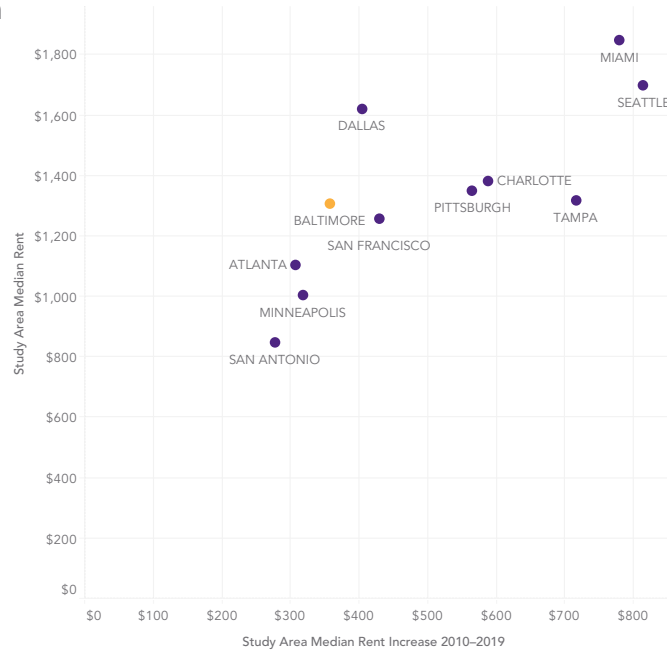
Source: American Community Survey (2015–2019)

Median Household Income Growth (2009–2019)



Source: U.S. Decennial Census (2010) and American Community Survey 5-Year Estimates (2009–2019).

Median Rent and Rent Growth (2010–2019)

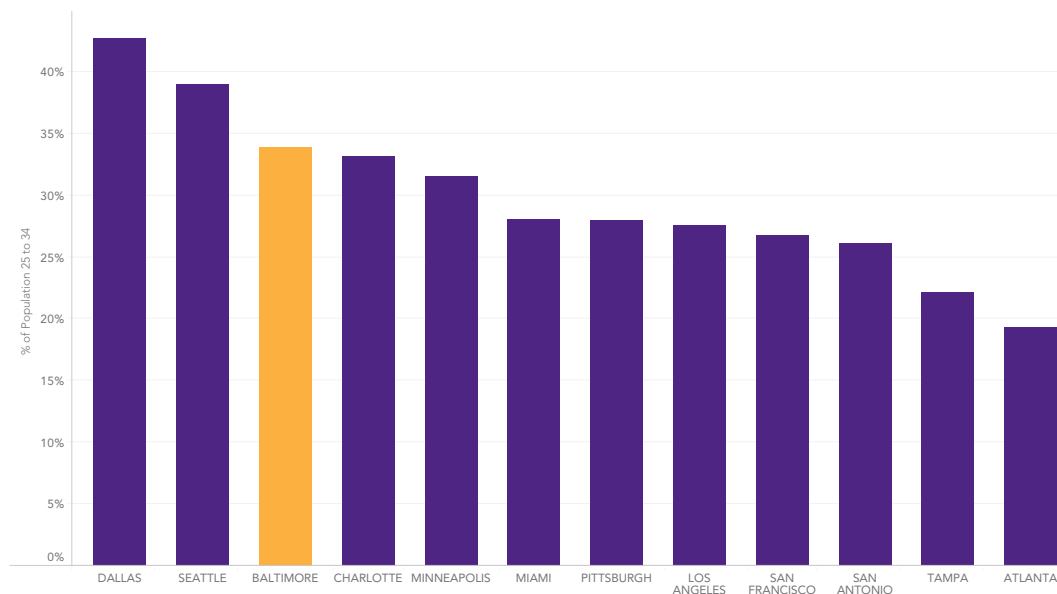


Source: American Community Survey 5-Year Estimates (2006–2010 and 2015–2019)

Age

Residents aged 25 to 34 make up downtown's largest age group. Out of large metros, Baltimore has third-highest proportion of residents in this range, at 34%. Baltimore also ranked third in absolute numbers of residents in this age cohort until Dallas overtook it in 2017.

Residents 25 to 34

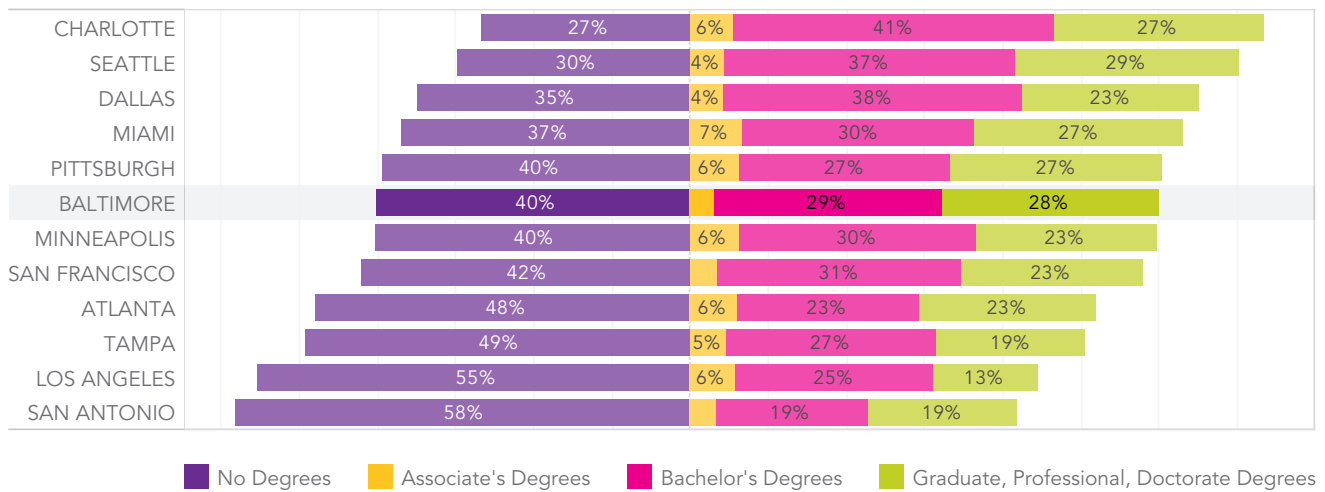


Source: American Community Survey 5-Year Estimates (2015–2019)

Educational Attainment

60% of downtown Baltimore residents hold a post-secondary degree (associate's, bachelor's, or graduate and above), putting it in the middle of the pack among large metros. While the proportion of residents with graduate degrees compares to the highest-educated metros, the proportion of residents who hold bachelor's degree places downtown in the middle of the pack.

Educational Attainment by Downtown Residents (2019) (% of Population)



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

Vibrancy

Vibrancy and urban amenities make downtowns rich, attractive environments. Thanks to density of people and connectivity to jobs, resources, and amenities, downtowns support a vibrant variety of uses. Study downtowns outpaced their respective cities in residential growth between 2000 and 2018, growing an average of 40% against a group citywide average of 15%. Downtowns also serve as regional centers of shopping, nightlife, and entertainment. The average study downtown accounts for 12% of all citywide retail sales dollars, contains 32% of all hotel rooms, and generates \$452m in retail sales per square mile—more than five times the citywide average.

Retail

A rich retail environment—particularly with experiential destinations like specialty retail and restaurants, bars, and breweries—plays an essential role in supporting district residents and encouraging employees to stay in the district longer and bring in visitors. In Baltimore, downtown's percentage of citywide retail sales, 22%, aligns with established downtowns and surpasses large-metro downtowns, but retail sales per square mile are significantly lower.

Among the 40 study downtowns, Baltimore has one of the lowest estimated proportions of retail sales to nonresidents, surpassing only Charlotte and Tampa. The large residential population creates significant retail demand, but unlike in other downtowns, a relatively low volume of visitors from other parts of the city translates into lower sales volumes. Lower-than-average retail rents reflect this lower demand, although downtown boasts lower vacancy rates than other large-metro downtowns. More succinctly, downtown retail serves the local market without functioning as a destination attraction.

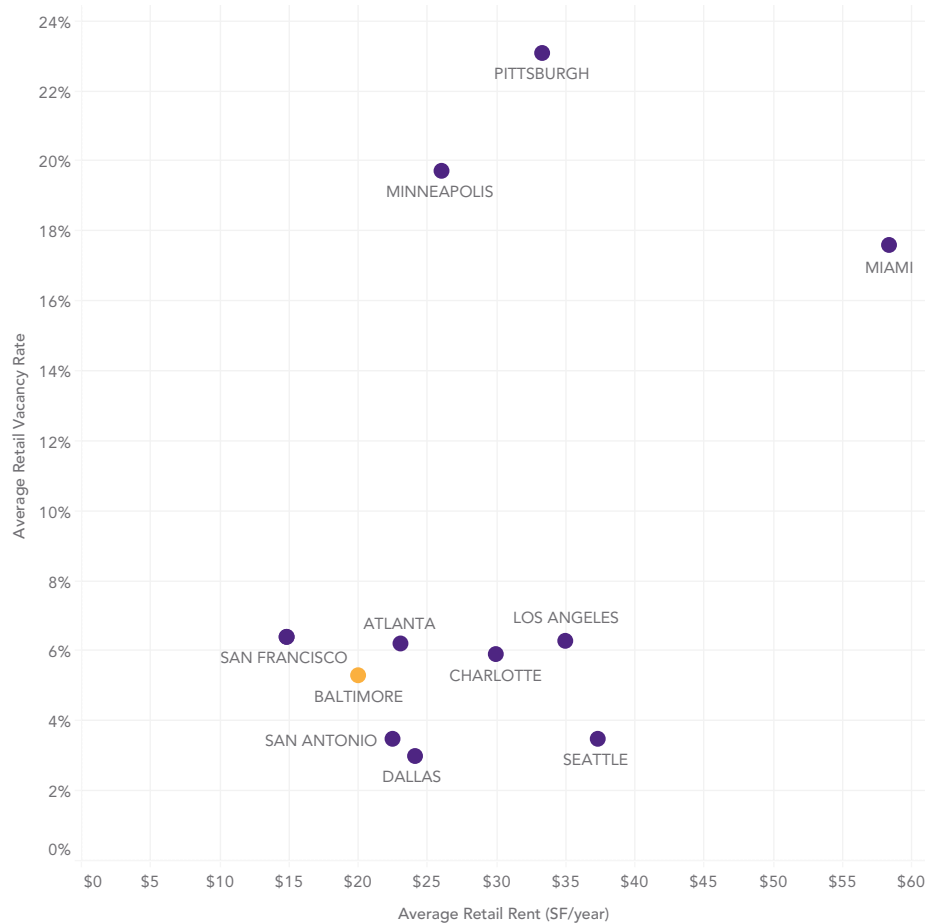


Retail

	DOWNTOWN BALTIMORE	ESTABLISHED DOWNTOWNS	LARGE-METRO DOWNTOWNS	AVERAGE OF ALL DOWNTOWNS
% CITYWIDE RETAIL SALES	22%	23%	17%	8%
RETAIL SALES PER SQUARE MILE	\$303.7M	\$962.9M	\$724.8M	\$190.1M
RETAIL BUSINESSES PER SQUARE MILE	344	556.4	435.3	166.1

Source: ESRI Business Analyst (2017)

Retail Price Per Square Foot vs. Vacancy



Source: All rents and vacancies are the most recent available in each downtown, which could be from Q12021 or Q42020. Sources include JLL, Colliers, Downtown LA, Charlotte Center City Partners, Centro San Antonio, Downtown Pittsburgh Partnership, Central Atlanta Progress, Downtown Partnership of Baltimore, Downtown Seattle Association, and Downtown Dallas, Inc.

Hotels

Across all study downtowns, Baltimore has the second-highest number of hotels downtown, and only San Antonio has a higher total hotel count, at 83. Baltimore ranks sixth across all downtowns for number of hotel rooms.

Of large-metro downtowns with data, Baltimore generates a very high percentage of citywide hotel tax revenue, despite a relatively low tax rate. It produces nearly 90% of citywide hotel tax revenue, but at just under \$10 million, total revenue ranks below the other three downtowns who provided this data, Atlanta, Seattle, and San Antonio.



Hotels

HOTELS

HOTEL ROOMS

DOWNTOWN
BALTIMORE

57

10,554

ESTABLISHED
DOWNTOWNS

35

9,160

LARGE-METRO
DOWNTOWNS

35

6,930

AVERAGE OF ALL
DOWNTOWNS

20

3,998

Source: All urban place management organization partners in the Value of Downtowns study. See full list of downtowns in the Appendix.

Resilience

The mixed-use nature of a downtown puts residential and commercial uses alongside each other, connected by a variety of mobility options. Downtowns in this study consistently rank significantly higher than their cities on the 100-point scales of Walk Score (86 downtown, 49 city), Transit Score (61 downtown, 35 city), and Bike Score (77 downtown, 52 city). Diversity and density of economic activities, resources and services equip downtowns to rebound from economic, social, and environmental shocks and stresses more easily than other parts of the city and region.

Health

Although existing data don't yet tell us much about COVID recovery, community health generally serves as a critical element of downtown's social resilience. Downtowns that have greater access to green space, and residents with more access to health insurance have longer life expectancies and also enjoy a higher quality of life.

Life expectancy for residents of most downtowns falls slightly below that for residents citywide. That gap typically reflects a lower median income in downtown than the larger city. Baltimore, however, is one of just seven downtowns in our study that buck that trend, with a downtown life expectancy of 79.6 years compared to 72.8 years citywide. That data point comes with one important caveat: Baltimore City has one

of the lowest life expectancies in our study. Nevertheless, downtown has the seventh-longest life expectancy of all downtowns, and the highest among the downtowns of other large metros. This longevity likely correlates with nearly 100% health insurance coverage downtown, the highest rate among the large metros we compared.

In addition to health, access to digital and virtual platforms counts as a critical element of resilience. Just 10% of downtown Baltimore households lack a computer, and only 7% don't have internet. This places Baltimore at the median for household computer access and well above the median for internet access.

Life Expectancy and Healthcare Comparison



Source: Robert Wood Johnson Foundation, American Community Survey 5-Year Estimates (2015–2019)

Commuting Patterns

The transportation sector contributed 29% of the U.S.'s greenhouse gas emissions in 2019, and vehicles such as passenger cars; medium- and heavy-duty trucks; and light-duty trucks (including SUVs, pickups and minivans) accounted for more than half of those emissions.⁵ Reducing reliance on personal vehicles will constitute a critical step for improving environmental sustainability—as well as for reducing congestion and creating spaces for people rather than cars.

In downtown Baltimore, almost half of residents use a sustainable mode of transportation (walking, biking, transit, carpool) to commute to work—about average for established downtowns, and higher than the average for this study's large-metro downtowns.

Focusing in on transit and walking, downtown boasts the fourth-highest percentage of residents who use transit to commute to work, at 19%. That compares to a median of 6% for all downtowns. An equivalent percentage of residents walk to work, but this ranks just above the 17% median for all downtowns. This pattern reflects the fact that over the past decade, Baltimore has actually experienced a slight decline in commuters who walk and an increase in those who use transit. Other large metros have recorded an increase in commuters who walk. Drive-to-work rates have remained stable in most large-metro downtowns except for San Antonio, which saw a large increase in commuting by car, and Seattle, where driving alone to work declined.



Sustainable Commute

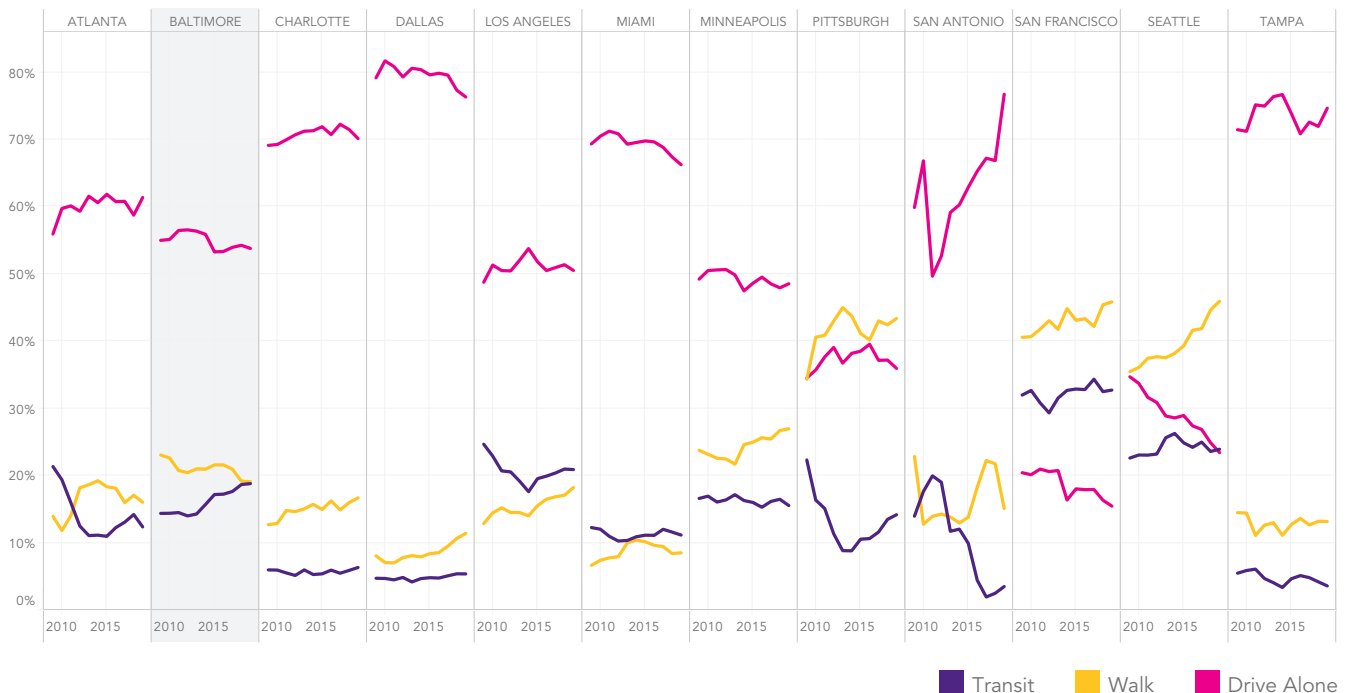
**DOWNTOWN
BALTIMORE**
46%

**ESTABLISHED
DOWNTOWNS**
44%

**LARGE-METRO
DOWNTOWNS**
39%

**AVERAGE OF ALL
DOWNTOWNS**
27%

Commute Mode Share (2009–2019)



Source: American Community Survey 5-Year Estimates from 2009–2019

Conclusion

A high-performing city center, downtown Baltimore sits right on average among its peers in both the established downtowns group and the large-metros group. While the pandemic severely affected all downtowns, some—like Baltimore—suffered less economic damage thanks to a large residential population. Fully recovering from COVID will depend heavily on expanding this residential base while retaining downtown workers. Downtown Baltimore stands out for its affordable residential and commercial markets, which may become even more attractive to people who have greater work flexibility post-pandemic. This study compares mostly pre-pandemic data to show how downtown stacks up against peers, identifying areas where it outperforms, matches, or underperforms those peers. The post-pandemic period offers downtown a unique opportunity to reimagine what a dense urban core looks like and who it serves. Understanding the past and the best practices of peer downtowns will enable Baltimore to focus future investments on making downtown a stronger center and core for the city and region as a whole.



APPENDIX

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Appendix

Benchmarking Downtown Tiers

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

- Density
 - Jobs per square mile
 - Residents per square mile
 - Assessed value per square mile
- Significance to city
 - Percentage of citywide jobs
 - Percentage of citywide residents
- Long-term growth
 - Percent growth in jobs (2002–2018)
 - Percent growth in population (2000–2019)

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

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

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

The compendium summary *The Value of U.S. Downtowns and Center Cities*, available on the IDA website, has additional data on the performance of emerging, growing, and established tiers of downtowns.

Full List of Value of Downtowns Participants

Tier	Downtown/District Participant	Population (2019)	Jobs (2018)	District Land Area (sq. mi.)
Established	Baltimore	50,417	122,072	3.69
	Fort Lauderdale	16,491	44,077	2.38
	Miami	89,743	173,504	5.05
	Minneapolis	43,527	159,095	3.35
	Pittsburgh	17,319	111,287	2.72
	Richmond	22,007	78,207	3.2
	San Francisco	44,173	271,458	1.2
	Seattle	74,389	248,199	2.73
	Waikiki	17,901	31,464	0.77
Growing	Ann Arbor	13,911	20,921	1.05
	Atlanta	29,336	129,115	3.37
	Austin	8,798	95,334	1.56
	Boise	3,695	40,238	1.59
	Charlotte	44,136	158,227	9.3
	Dallas	46,291	260,996	10.63
	Durham	10,589	23,812	2.91
	Huntsville	13,428	28,992	4.86
	Indianapolis	25,951	154,099	5.69
	Lexington	31,719	40,773	4.41
	Los Angeles	77,616	315,955	6.68
	Norfolk	8,307	36,159	1.12
	Sacramento	21,275	98,581	5.00
	Santa Monica	4,659	22,584	0.69
	Tempe	3,843	32,041	0.93
	Albuquerque	1,422	16,622	0.49
	Birmingham	10,602	63,112	3.22
Emerging	Cleveland	14,660	91,453	3.24
	El Paso	4,334	11,347	1.08
	Evansville	2,558	17,875	1.22
	Grand Rapids	5,434	42,744	0.95
	Greensboro	16,328	29,395	3.71
	Hollywood	26,631	31,494	1.40
	Lancaster	4,634	3,226	0.69
	Little Rock	7,820	40,722	4.37
	Oklahoma City	8,736	54,149	4.28
	San Antonio	3,160	35,055	1.36
	Spartanburg	2,028	8,627	1.44
	Tampa	17,111	71,771	2.86
	Toledo	3,452	16,544	1.18
	Tucson	2,921	23,127	0.78
	Tulsa	3,625	29,746	1.39
	Wichita	1,751	25,216	0.99

REFERENCES



Endnotes

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