



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

CALCULATING THE VALUE OF NEW HAVEN, CONNECTICUT  
A 2023 IDA STUDY

A 2023 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](https://downtown.org).

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



## Stantec's Urban Places

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

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

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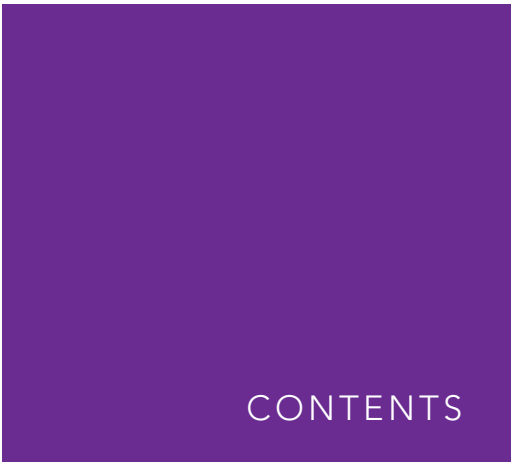
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SECTION ONE  
PROJECT  
OVERVIEW





# Introduction

## GREAT CITIES START DOWNTOWN

No city or region can succeed without a strong downtown, the place where compactness and density bring people, capital, and ideas together in ways that build the economy, opportunity, community and identity. Downtowns across the U.S. experienced unprecedented change as a result of the COVID-19 pandemic. Nevertheless, in some ways the pandemic highlighted the importance of vibrant urban places. As urbanist Richard Florida describes, “downtowns today are not just places to live, work and shop: They are the very best places for people and businesses to connect to each other. In big metros and small, downtowns occupy the most central locations and have the highest concentrations of spaces where people can come together.”<sup>1</sup>

Despite a relatively small share of a city’s overall geography, a downtown delivers significant economic and community benefits across both the city and region. Downtown serves as the epicenter of commerce, capital investment, diversity, public discourse, socialization, knowledge and innovation. In short, the proximity and density that downtown and center cities create drives the city around them to thrive.

While remote work is likely to reduce the daily number of office workers in downtowns in the long-term, other downtown activities are now thriving. Restaurant reservations are exceeding pre-pandemic levels, stadiums and sports arenas are full, and residential real estate in dense, urban areas continues to be in high demand. Downtowns are more than a central business district, and are adapting to become more well-rounded live, work and play communities. The 15-minute city, the idea that everyone living in a city should have access to essential daily services within a 15-minute walk or bike ride, has gained in popularity as an indirect result of the pandemic and reinforces the value of the mixed-use nature of many of our downtowns and center cities.<sup>2</sup>

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





## About the Value of Downtowns Study

Building on IDA's unique industry-wide perspective and expertise, this study quantifies the value of U.S. downtowns and center cities across more than 150 metrics organized under five core value principles, with a focus on how downtowns contribute to the city and region around them. The *Value of U.S. Downtowns and Center Cities* study is a partnership between IDA and local urban place management organizations (UPMO).

The *Value of U.S. Downtowns and Center Cities* research articulates the inherent value a downtown provides to the greater city, highlighting a district's contributions based upon 150+ key data points in the principles of Economy, Inclusion, Vibrancy, Identity and Resilience. Our 2020 data showed that study downtowns outpaced their cities in residential growth between 2000 and 2020, growing an average of 46% against the citywide average of 15%.

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 2023, our analysis has expanded to include 49 downtowns and center cities across the U.S.

IDA and our UPMO partners work together to collect more than 150 individual metrics for the most recent year and over the past decade and three geographic levels (study area, city, and MSA/county). In addition, for employment data we collect three different jobs totals (primary, all jobs, and all private) for all years between 2002 and 2020 to show more nuanced employment trends over time. The demographic and jobs data included in the study does not extend beyond the COVID-19 pandemic, but some real estate, tax, and assessment data include 2022 and 2023 figures.

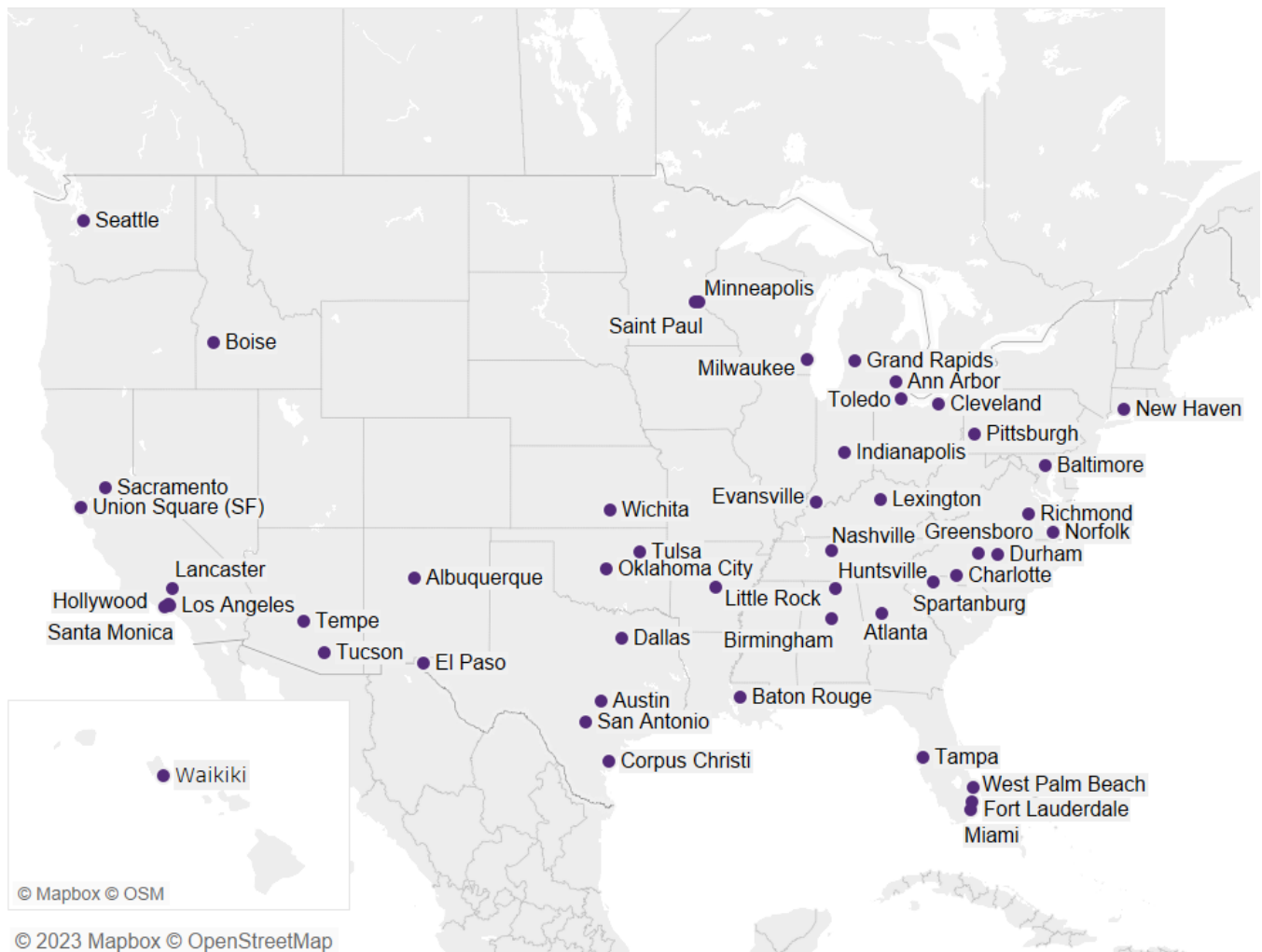
\*Refer to the Appendix for the full methodology and list of metrics used in the study.

## Urban Place Management Organizations

The place management industry brings the public and private sectors together to create vital, healthy, thriving cities for everyone — from residents to workers to tourists to business owners. We are downtown champions who bring city centers to life.

Since 1970, property and business owners in cities throughout the U.S. and other countries have realized that revitalizing and sustaining vibrant city centers and neighborhood districts requires special attention beyond the services city administrations could provide alone. These private-sector owners came together, with funding from the property and business owners, to form nonprofit management associations which deliver key services and activities within the boundaries of their districts. These place management organizations are often called Business Improvement Districts (BIDs), Business Improvement Areas (BIAs), Partnerships and Alliances.

### Value of Downtowns Participants



## ECONOMY



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

## INCLUSION



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

## VIBRANCY



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

## IDENTITY



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

## RESILIENCE



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







An aerial photograph of a city skyline at dusk, with a purple and blue color cast. A large, white, stylized graphic element, resembling a thick, curved line that forms a partial circle at the top and a horizontal bar at the bottom, is overlaid on the right side of the image. The city buildings are densely packed, with a prominent tall, modern skyscraper in the upper right. The sky is filled with soft, purple and blue clouds.

SECTION TWO  
DOWNTOWN  
PROFILE

# Downtown Profile | Overview

In this profile, we detail downtown New Haven's outsized presence on South Central Connecticut's regional economy. We explore how the diversity of downtown New Haven, standing out among IDA's study, contributes to a strong sense of inclusion and community strength. We investigate how its vibrancy and identity have positioned downtown New Haven as a place that's growing, active, and most of all, fun. And, in the post-pandemic context of U.S. downtowns, we describe how downtown New Haven exemplifies extraordinary resilience across economic, social, and environmental dimensions. Taken together, these advantages bring into focus a downtown that is poised for continued success in future years, thanks in no small part to the significance of entities like Town Green District (TGD), Market New Haven, Inc. (MNHI), and New Haven Parking Authority (NHPA). These organizations strive year-round to improve ownership values by making downtown New Haven an internationally competitive urban environment to live, work, learn, and visit.

Located in a small city of just under 140,000 people, downtown New Haven is a regional hub of employment and entertainment. Despite occupying less than 10% of the city's land area, it concentrates more than two-thirds of the city's jobs and nearly 70% of its hotel rooms within 1.8 square miles. Downtown workers and visitors sustain a vibrant local economy that makes up more than a quarter of the city's retail trade and food and beverage sales for a greater share than all but one downtown in IDA's *Value of U.S. Downtowns and Center Cities* study.

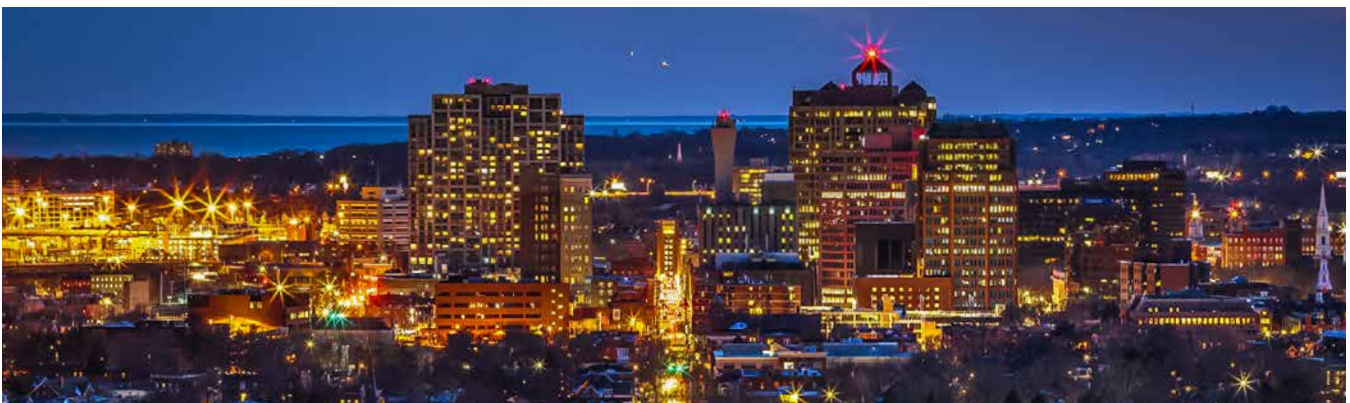
## Study Area

DOWNTOWN PARTNER  
Town Green District,  
Market New Haven, Inc., and  
New Haven Parking Authority

CITY  
New Haven, Connecticut



Downtown's 14,000 residents contribute to its importance, too, comprising just over 10% of New Haven's population. Downtown has experienced a steady residential growth rate of 22% between 2000 and 2021, nearly tripling both the city's overall growth rate and the national average. It also welcomed the addition of a 15% increase in new unit construction between 2010 and 2020, creating additional room for growth. Still, demand outpaces supply, which has caused median rents to grow roughly twice as fast downtown as in the city or region. Despite these cost pressures, downtown remains home to a balanced distribution of income levels. It is also remarkably diverse, with only six other downtowns scoring higher on the Diversity Index, which measures the chance that two randomly selected residents will belong to different racial or ethnic backgrounds.







## Residential Population

	Downtown	City	Region
Population	13,991	133,874	864,751
Residential Share	n/a	10.5%	1.6%
Residents per Acre	12	11.2	2.2
Residential Growth 2000–2021	22%	8.3%	4.9%

Source: U.S. Census Bureau (2000), American Community Survey 5-Year Estimates (2017–2021)



## Employment 2020

	Downtown	City	Region
Primary Jobs	59,000	85,000	311,000
Downtown Share Of Primary Jobs	n/a	70%	18%
Employees Per Acre	50.7	7.1	0.9
Primary Employment Growth 2017–2020	13%	9%	-3%
Primary Employment Growth 2002–2020	25%	21%	-2%

Source: LEHD On the Map (2002–2020)

## Top 5 Industries

	Downtown Jobs (%)	Downtown Jobs (#)
Educational Services	48%	28,500
Health Care And Social Assistance	18%	10,800
Administration & Support, Waste Management and Remediation	7%	4,200
Professional, Scientific, and Technical Services	4%	2,600
Public Administration	4%	2,600

Source: LEHD On the Map (2020)

Many residents also work downtown. As of 2020, these 1,900 worker-residents represent about 14% of downtown's residential population. The local economy is primarily dominated by jobs in the knowledge industry — and especially in the health care and social assistance sector, which accounts for 61% of downtown's knowledge industry employment. Due in part to the outsized presence of Yale University, this industry has helped fuel a remarkable 25% growth in primary jobs since 2002, with other sectors like administration and support also seeing rapid expansion. The 13% growth in jobs since 2017 underscores downtown New Haven's sustained economic vitality and its role as a cornerstone of the city's economy.

Analysis of downtown New Haven places it among the *established* tier of downtowns in IDA's study. *Established* downtowns typically concentrate high shares of both employment and residents, as illustrated by downtown New Haven's impressive 70% of the city's primary jobs and 10% of the city's population. This concentration of both jobs and residents downtown serves as a harbinger of its success as a vibrant hub for culture and recreation. Downtown New Haven boasts a high density of entertainment options, including 24 live venues and three theatres that attract local and national performances. It's also a retail powerhouse, with roughly one-third of the city's retail trade and food and beverage businesses located downtown in less than 10% of the city's total land area. As a result, employment in the retail and food service sectors has been on the rise, signaling the area's economic resilience and its important role in the city's overall prosperity.



## Comparison

	Downtown New Haven	Established Downtowns	Study Average
Land Area (square miles)	1.8	2.7	2.7
% of Citywide Land	9.7%	6%	3%
Change In Employment 2002–2020	25%	13%	5%
Population Growth 2000–2021	22%	56%	50%

Source: US Census Bureau (2000), LEHD On the Map (2002–2020), American Community Survey 5-Year Estimates (2017–2021)

## Inventory



OFFICE (SF)

Downtown % of City

3.35M 31%



RESIDENTIAL UNITS

7,338 13%



HOTEL (ROOMS)

1,154 68%

Source: Cushman and Wakefield (2023), American Community Survey 5-Year Estimates (2017–2021), DataHaven (2023)

Note: Office inventory based on Cushman & Wakefield definition of the New Haven CBD, which is smaller than the study area used in the rest of the report

### Ranking Downtown New Haven

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

Downtowns in the *established* tier have high density and a high degree of citywide significance in terms of jobs, population, and land values. Most *established* districts continue to grow in these areas, although more slowly than districts in the *growing* tier. They also tend to cover a larger proportion of the citywide land area. It may seem unusual for a relatively small city to have an *established* downtown, and at 1.8 square miles, downtown New Haven is somewhat smaller than the 2.7 square mile average of other *established* downtowns. However, because downtown New Haven has a large share of the city's jobs and residents, as well as a large land area relative to the city's geography, it easily fits the criteria of *established* downtowns within IDA's study. Within the *established* group of downtowns, downtown Miami is a surprisingly apt comparison to downtown New Haven. Though downtown Miami is far denser, both cities rank comparatively on several key metrics that measure their role within the context of their cities, such as share of city-wide area, retail concentration, share of citywide jobs, and population diversity index.

Please view the Summary section of this report for data comparing downtown New Haven to its peers within the *established* tier. For the full set of cities by tier, accompanying data points, and methodology, refer to *The Value of U.S. Downtowns and Center Cities* compendium, which is available on the IDA website, [downtown.org](http://downtown.org).

#### *Established Downtowns*

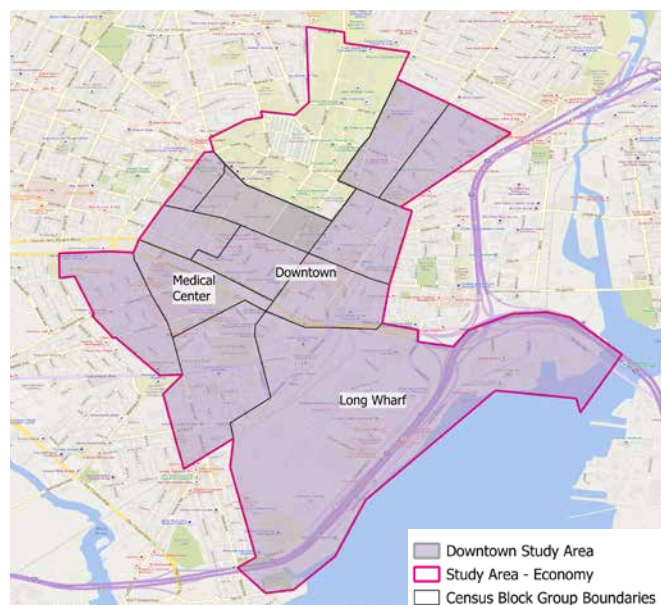
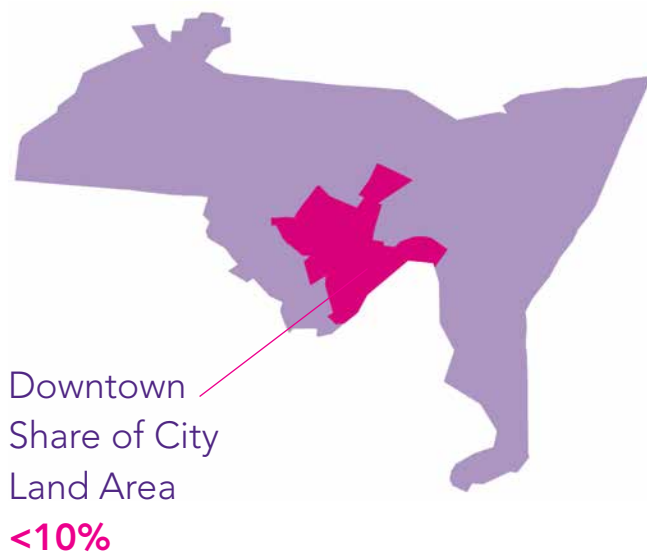
- Baltimore
- Fort Lauderdale
- Miami
- Milwaukee
- Minneapolis
- **New Haven**
- Pittsburgh
- Richmond
- Saint Paul
- San Francisco
- Seattle
- West Palm Beach





### Defining Boundaries

IDA worked with TGD, MNHI, and NHPA to align the study area with Census block group boundaries which closely aligned with the public's perception of downtown. This facilitates easy incorporation of publicly available data from a variety of sources, while matching the boundary to hard edges such as roads, water features, or highways as much as possible. The study boundaries expand on the City of New Haven's definition of downtown, which is centered on the traditional CBD, to include New Haven Union Station and the Medical District. This boundary was selected to reflect the ongoing efforts in New Haven to reconnect these neighborhoods to the traditional central business district, and better connect residents of those areas to the opportunities available downtown. The Medical District was also included, as its growth in recent years through private investment as well as through Yale New Haven Health System and Yale University, has made it a de facto part of the downtown area. However, in the Economy section the study area was extended to include most of Yale University's main campus, as the large number of jobs and the variations in the precise geocoding of Yale jobs from year to year within the LEHD database made excluding the campus impractical. The study boundaries captured these areas as well as possible within the geography of Census block groups, to allow for the greatest interoperability of data across many sources.



# Economy | Impact, Innovation

Downtowns make up a small share of their city's land area but have substantial economic importance. Though 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 continued recovery from the COVID-19 pandemic has raised many questions about the future, 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



Source: LEHD On the Map (2020)

## Jobs

Downtown New Haven is an economic powerhouse, concentrating 70% of the city's jobs in approximately 10% of its land area. Even compared to other *established* downtowns, which are home to 43% of their cities' jobs on average, New Haven stands out. Compared to the other established downtowns that have participated in this IDA study, only downtown Miami has a high concentration of citywide jobs at 64%.

The knowledge industry plays a pivotal role in New Haven, especially in the downtown area where 59% of these jobs are located. This industry is technology-dependent and demands a highly skilled workforce. It comprises several key sectors, with the health care and social assistance sector accounting for 61% of downtown's knowledge industry employment. Over the 2010s, the industry experienced mixed trends in New Haven; while some sectors expanded, others contracted. This pattern was similarly evident downtown, which serves as a hub for this multifaceted industry.

The health care and social assistance sector, and educational services, dominate downtown's job market, collectively accounting for almost 40,000 jobs as of 2020. Together, they make up about two-thirds of the study area's primary employment, defined as a worker's highest-paying job if they have more than one. Both sectors are interconnected

Note: Throughout this Economy section, the study area was extended to include most of Yale University's main campus. See Overview section for more information.

through the presence of Yale University. In educational services, downtown's largest sector, Yale University contributes through the university itself and various auxiliary facilities. Since 2002, the sector has experienced significant expansion, growing by 56% in downtown. That's roughly in line with the city's 58% growth in the sector, signifying that downtown is maintaining its strength as the primary location of these jobs; as of 2020, 90% of New Haven's educational services jobs were located in downtown. This substantial growth is attributable to the opening and expansion of State Community College's downtown campus, a new performing arts high school in the downtown area, and Yale's increasing establishment of educational and administrative facilities in off-campus auxiliary buildings downtown. In the healthcare and social assistance sector, Yale New Haven Health System is a major employer, accounting for approximately 80% of jobs in this sector either at the hospital or in its immediate vicinity in what has become known as the Medical District. This sector provides 10,800 jobs in the downtown area and saw a 33% growth from 2002 to 2020, although it has remained relatively stable with minimal growth since 2011.

Downtown's other leading industries include administration and support; professional, scientific, and technical services; and public administration. Administration and support, which is composed of firms specializing in routine support

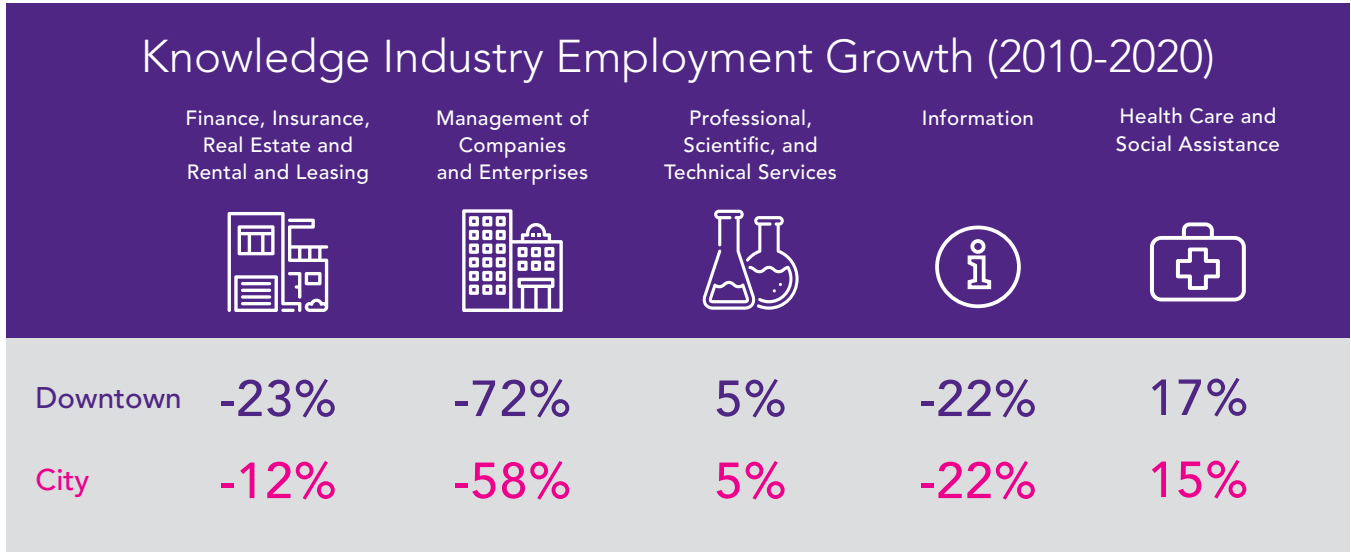
activities that are essential to the day-to-day operation of other firms, represents 4,200 jobs downtown. This sector has grown rapidly in recent years, with employment increasing by 133% since 2010, possibly indicative of larger firms and institutions trending towards procuring these services externally rather than internally. There are 2,600 jobs in the professional, scientific, and technical services sector downtown, with life sciences representing a particular strength within this sector. In 2022, CBRE ranked New Haven among the top 25 U.S. metro areas for life sciences research talent, which has contributed to a 5% surge in employment in the professional, scientific, and technical services sector since 2010.<sup>1</sup> Meanwhile, public administration, which includes many government functions, makes up another 2,600 jobs in downtown New Haven and has been stable at roughly current employment levels since 2002.

Downtown's 59,000 jobs represent a strong growth rate of 25% in primary employment since 2002. This significant growth places it near the top of *established* downtowns in job growth over that time frame, behind only downtown San Francisco's astonishing 61% growth. Since 2017 alone, primary employment has grown by 13%, showing that downtown's job growth has continued its upward trend even in recent years.



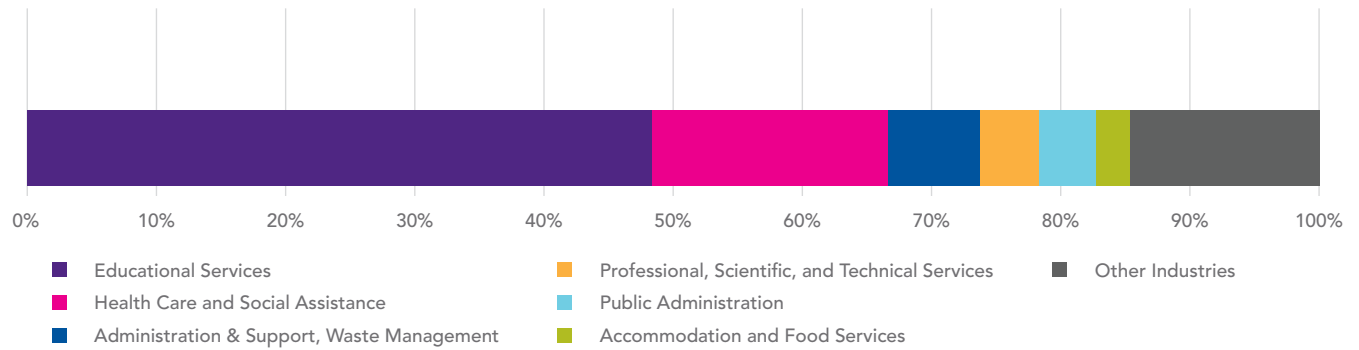


## Knowledge Industry Employment Growth (2010-2020)



Source: LEHD On the Map (2010 and 2020)

## Top Industries Downtown



Source: LEHD On the Map (2020)

### Small Businesses & Startups

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.

Employment in downtown New Haven is overwhelmingly dominated by the city's largest and oldest firms. Nearly 95% of downtown's private jobs are at businesses more than 11 years old. This is the highest share of such jobs of any downtown in our study, though it is in line with the city's overall environment, where 91% of all jobs are also at firms older than 11 years. Meanwhile, 82% of private employment in downtown New Haven is concentrated at businesses that employ 250 or more people. This also represents one of the highest percentages among downtown areas studied, surpassed only by Atlanta and Tempe in the share of private employment at large firms. Still, it is not far off from the city's 75% share, although it is much higher than the region's share of 57% of jobs at the largest firms.

Taken together, these trends indicate that the region's largest — and oldest — businesses tend to locate their operations downtown. This pattern is typical among *established* downtowns, which generally are home to the largest and oldest firms of the region. *Established* downtowns average 83% of private employment at firms older than 11 years, and 69% at firms with 250 or more people.



### Jobs by Firm Size

	Downtown	City	Region
< 20 PEOPLE	7%	10%	17%
20-249 PEOPLE	11%	15%	26%
250+ PEOPLE	82%	75%	57%

Source: LEHD On the Map (2020)



### Jobs by Firm Age (2018-2020)

	Downtown	City	Region
< 3 YEARS	2%	3%	4%
4-10 YEARS	4%	6%	9%
11+ YEARS	94%	91%	87%

Source: LEHD On the Map (2020)



### Jobs by Earnings Annually

	Downtown	City	Region
\$15K OR LESS	13%	15%	19%
\$15K TO \$40K	14%	18%	25%
\$40K OR MORE	73%	67%	56%

Source: LEHD On the Map (2020)



## Land Value and Assessment

	Downtown	City
ASSESSED VALUE	\$1.50B	\$7.71B
ESTIMATED MARKET VALUE	\$3.54B	\$17.9B
LAND AREA IN SQUARE MILES	1.8	19
ESTIMATED MARKET VALUE PER SQ. MI.	\$1.95B	\$942.1M

### Fiscal Impact

Downtowns typically concentrate the densest development and highest property values in their region. Downtown New Haven is no exception, with an estimated market value of \$3.54 billion for its downtown properties. This equates to almost \$2 billion in value per square mile, more than double the city’s average property value of \$942 million per square mile.

Among downtown’s valuable real estate assets is its local office market. More than 3.3 million square feet and 30% of the area’s office market is concentrated in the central business district, according to Cushman & Wakefield.<sup>2</sup>

Downtown concentrates the highest paying jobs in New Haven. 73% — or almost three-quarters — of downtown jobs pay \$40,000 or more annually, compared to 67% of jobs elsewhere in the city. Due to the volume of employment opportunities in the downtown area, with many of these positions offering higher pay, 59% of all jobs in New Haven with annual earnings of \$40,000 or more are situated downtown.

Source: DataHaven, City of New Haven Assessor’s Office (2023)





# 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.

Continuing to create a downtown that is equitable, inclusive, and welcoming to everyone is a central focus of the Downtown Loves NHV, a 501(c)(3) non-profit charity arm of the Town Green District. Its mission is to “ensure downtown serves as the diverse cultural and economic heart of New Haven, through strengthening and honoring the connections of surrounding neighborhoods to downtown by using public art, events, and public space improvements.”

## Racial Diversity

Compared to most downtowns in our study, Downtown New Haven is notably diverse, with 62% of its population identifying as non-White — about 15% higher than the average downtown. This diversity is reflected in its Diversity Index score of 80, suggesting a high chance that two randomly selected residents belong to different racial or ethnic backgrounds. Only six other downtowns in our study score higher, and among *established* downtowns, only Miami has a higher Diversity Index score.

It is crucial to consider downtown’s diversity in the broader context of New Haven, a city where only 21% of respondents

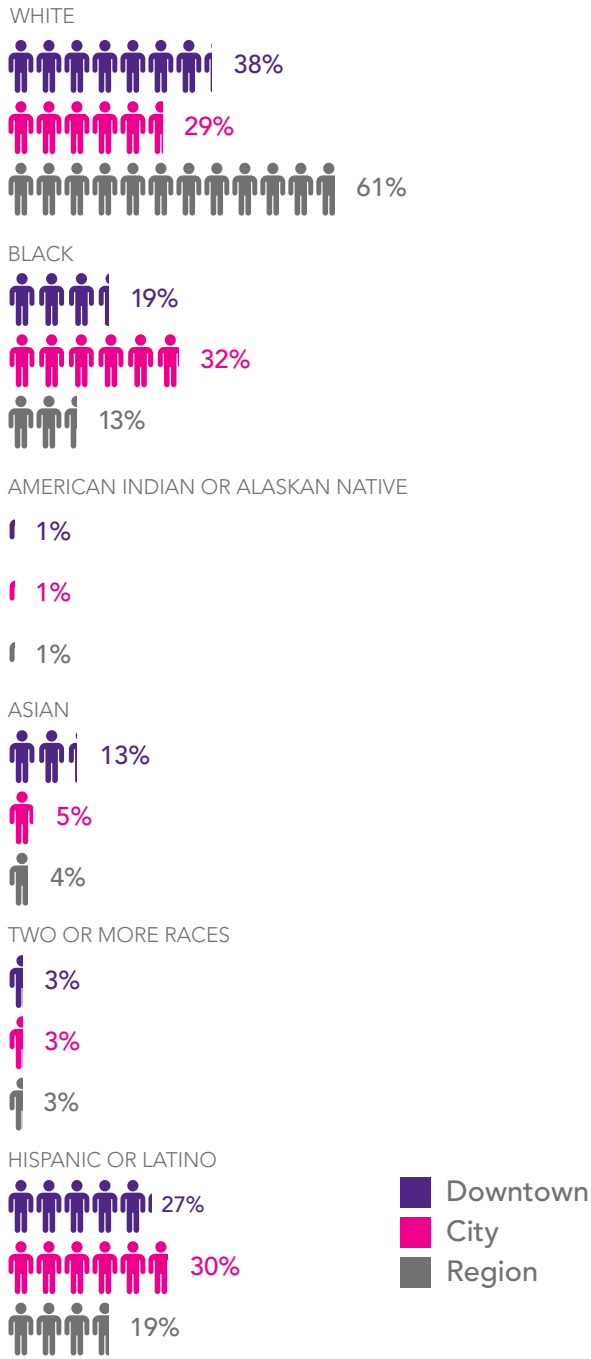
**Benefits of Inclusion:** Equity, Affordability, Civic Participation, Civic Purpose, Culture, Mobility, Accessibility, Tradition, Heritage, Services, Opportunity, Workforce Diversity

in the American Community Survey identified as White alone. In the city, 32% self-reported as Black/African American, roughly the same as the 30% share of city residents who identified as Hispanic or Latino. Therefore, the city has a slightly higher Diversity Index score of 84.

Over the years, the racial makeup of downtown New Haven has been gradually aligning with the city’s overall diversity, evidenced by a 6% increase in non-White residents since 2011, while the total number of residents has remained relatively stable. A notable exception is downtown’s Asian & Pacific Islander population, which is disproportionately large compared to the city. Meanwhile, the racial and ethnic profile of downtown workers is almost identical to the citywide workforce, according to data from the Census Bureau’s Longitudinal Employment-Household Dynamics program.

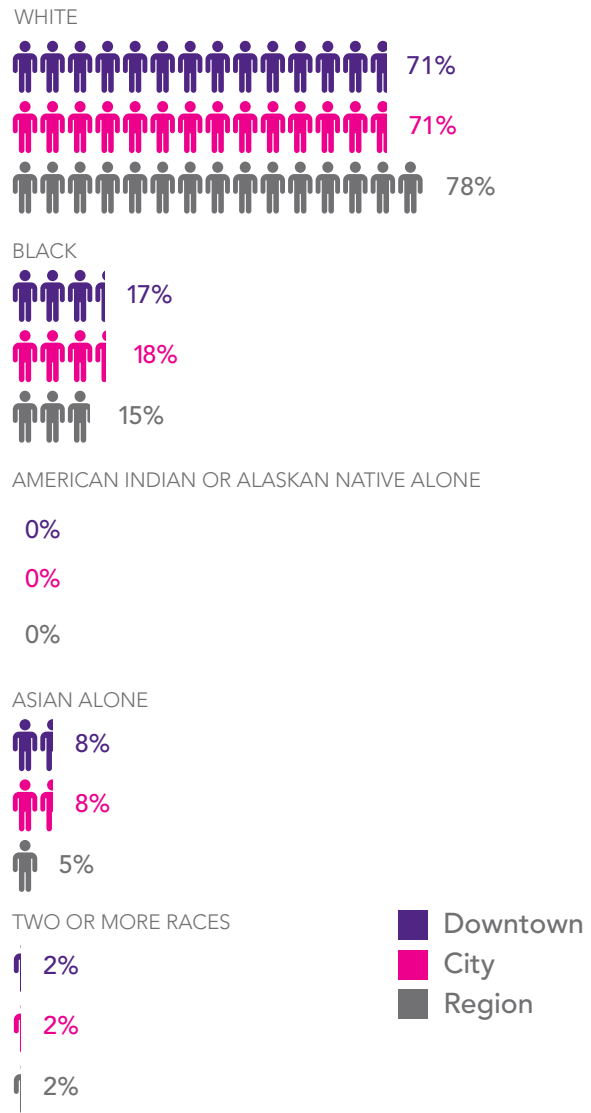


## Residents By Race and Ethnicity



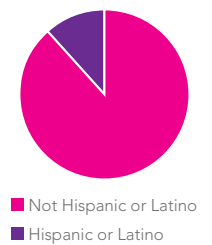
Source: American Community Survey 5-Year Estimates (2017–2021)

## Employment By Race



Source: LEHD On the Map (2020)

## Downtown Workers by Ethnicity



Source: LEHD On the Map (2020)

**Age Diversity**

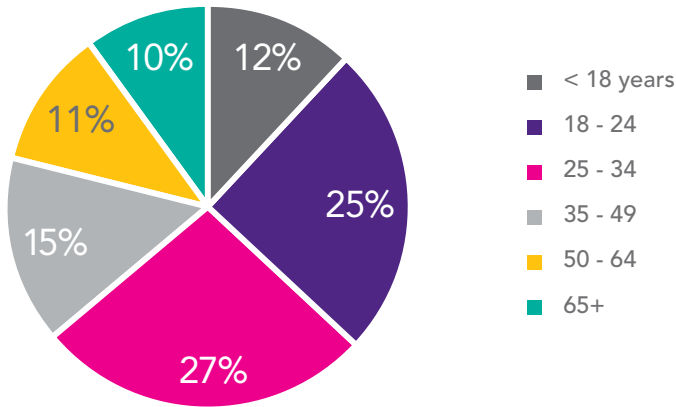
Downtown New Haven is younger than the city at large, with about half of its residents aged between 18 and 34, as opposed to 34% in the broader city population. A shift occurred in the early 2010s, when the 25 to 34 age group significantly surpassed the 18 to 24 age group, suggesting that downtown was becoming increasingly appealing to young professionals in addition to students. However, this gap has recently narrowed, and the demographic landscape in downtown New Haven remains fluid, potentially due to the ongoing impact of COVID-19 on higher education.

**Who's Downtown**

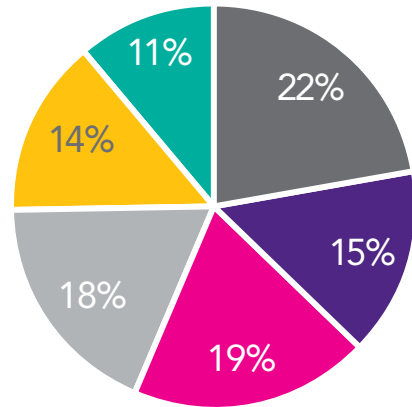
RESIDENTS	13,991
WORKERS	59,012
RESIDENTS WHO ALSO WORK DOWNTOWN	1,900
ANNUAL VISITORS (2021)	2.7M

Source: American Community Survey 5-Year Estimates (2017–2021); LEHD OnTheMap (2020); Destination New Haven (2022)

Downtown Age Diversity

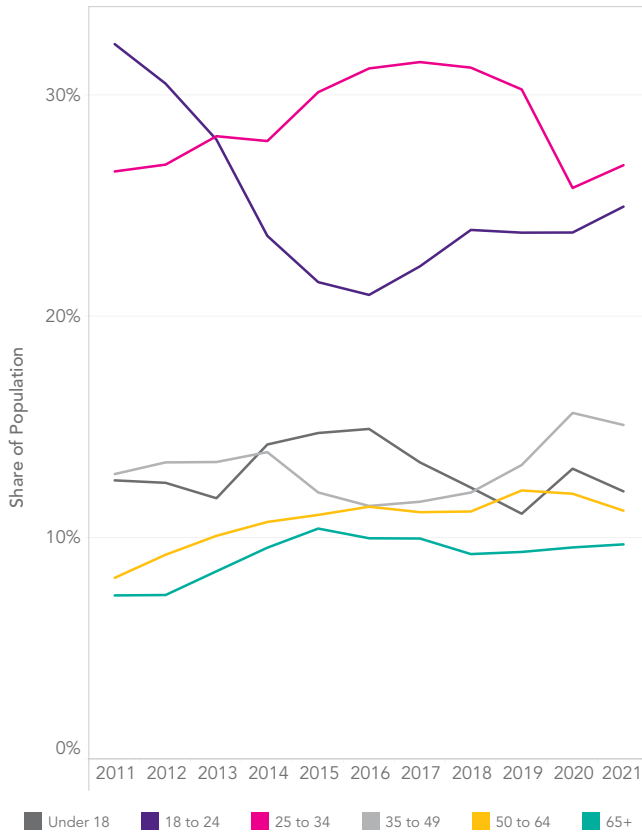


City Age Diversity



Source: American Community Survey 5-Year Estimates (2017–2021)

## Downtown Residents' Age Diversity



Source: American Community Survey (2011–2021)



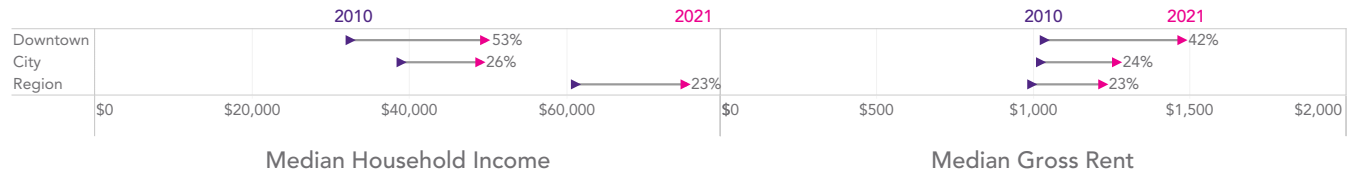


### Socioeconomic Diversity

Downtown New Haven is home to a diverse range of income levels, with a fairly balanced distribution. About 38% of downtown households led by someone aged 25 or older earn less than \$40,000 annually, while 35% earn between \$40,000 and \$100,000. These income levels are generally consistent with the city as a whole, although both the downtown and city areas have slightly lower incomes than the New Haven County median.

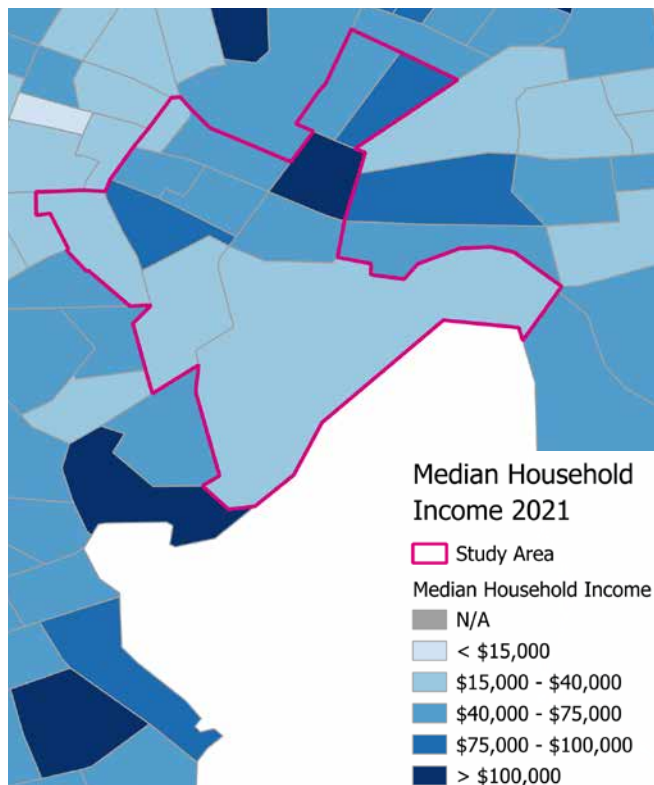
Since 2010, the median household income in downtown has risen by 53% to approximately \$50,000 per year, outpacing the growth in both the city and the region. Despite this, the regional median income remains notably higher at about \$75,000. This income growth downtown has been somewhat offset by a 42% increase in median rents during the same period.

### Household Income and Rent Growth Over Time



Source: American Community Survey 5-Year Estimates (2006–2010, 2016–2020)

### Median Household Income



Source: American Community Survey 5-Year Estimate (2017–2021)

### Jobs by Educational Attainment

#### HIGH SCHOOL OR LESS



#### SOME COLLEGE OR ASSOCIATE'S DEGREE



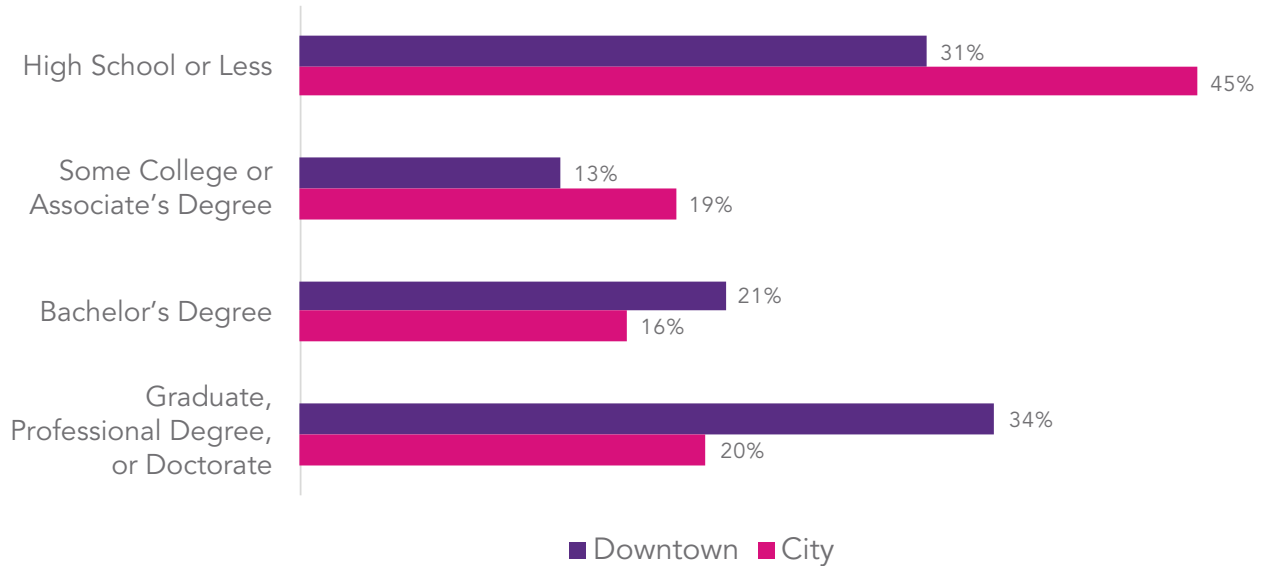
#### BACHELOR'S OR ADVANCED DEGREES



Downtown City

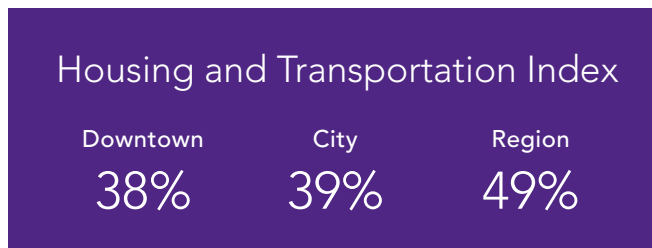
Source: LEHD On the Map (2020)

## Educational Attainment for Residents 25+



Source: American Community Survey 5-Year Estimates (2017–2021)

Note: Percentages may not add to 100% due to rounding.



Source: Center for Neighborhood Technology (2019)

Anchored by Yale University, 56% of downtown residents over the age of 25 hold a bachelor's degree or higher, compared to 36% across the city. While this is impressive, it's only slightly above the median across all study downtowns of 53%, suggesting that the downtown area is not solely populated by those affiliated with the prestigious institution. In contrast, 45% of all New Haven residents have a high school education or less, while this figure stands at 31% for downtown residents.

Interestingly, unlike the residential population, the educational profile of downtown workers more closely mirrors that of the city's overall workforce. Despite a focus on sectors typically requiring high levels of education, like health care, the composition of workers downtown closely aligns with the composition of workers in the city. This accessibility to jobs across educational levels benefits the entire city, especially since downtown offers a high concentration of well-paying positions that are not out of reach for the average New Haven worker. The workforces of both the downtown area and the city have remarkably similar educational qualifications.

## Housing Affordability

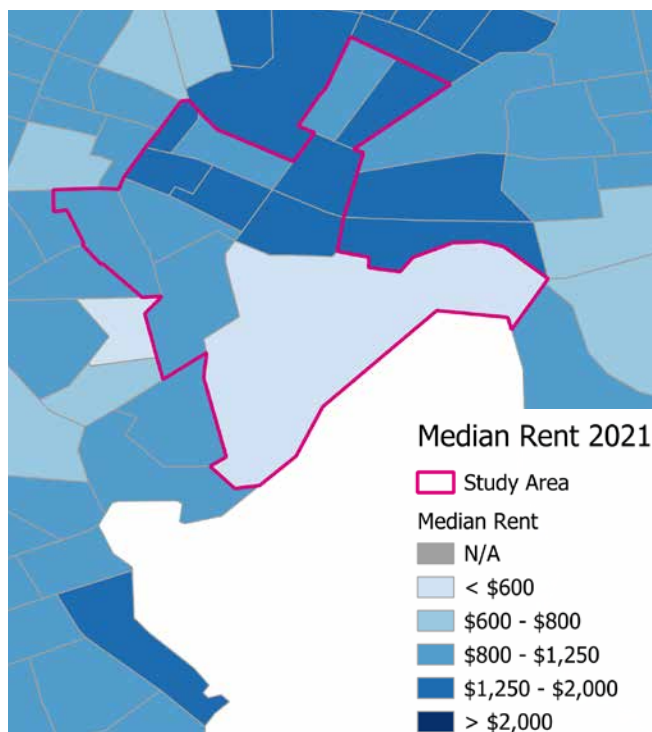
Despite downtowns generally being more expensive places to live, their density of housing, concentration of jobs, and access to public transportation can make living in a downtown less expensive than living in other neighborhoods when factoring in the cost of transportation. This is not necessarily the case in New Haven, where the combined costs of housing and transportation downtown are roughly equal in the city as a whole. Still, according to the Center for Neighborhood Technology's Housing & Transportation Index, downtown residents benefit from greater locational efficiency, and rates as much less expensive than the rest of the region, with closer proximity to work, services, and other common destinations. With downtown's greater density of transit routes and stops, downtown residents enjoy more affordable transportation options than their neighbors throughout the city and region.

The attractiveness of downtown as a place to live, as evidenced by growth in its number of residents, has pushed median gross rents higher than in the city and

region over the past decade. Since 2010, rents have increased by 42% in downtown while across the city they have risen by 24%. Although this shift can be partly attributed to local market dynamics — including demand for downtown housing that outpaces additional supply — it also reflects significant spikes in housing costs experienced nationwide, for which complete data is not yet available. The Federal Reserve rent index in U.S. cities increased by 15%, from 346 to 395, between April 2021 and April 2023.<sup>3</sup> This rapid increase poses a challenge for many communities.

A much higher share of downtown residents — 88% — rent their homes. While this may seem high, it is illustrative of a trend among study downtowns, where 81% of units are renter-occupied on average. In fact, roughly two-thirds of all study downtowns fall between 70 and 90 percent of renter residents. This highlights the impact of rent price changes to almost all downtown residents.

## Median Rent



Source: American Community Survey 5-Year Estimate (2017–2021)

## Downtown Renters

	Downtown	City	Region
% RENTER OCCUPIED	88%	72%	37%
MEDIAN GROSS RENT	\$1,476	\$1,267	\$1,223
MEDIAN RENT INCREASE 2010–2021	42%	24%	23%
RENT-BURDENED	45%	52%	48%

Source: American Community Survey 5-Year Estimates (2017–2021)



# Vibrancy | Spending, Fun

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

Downtowns and center cities typically form the regional epicenter of culture, innovation, community, and commerce. Downtowns flourish due to density, diversity, identity, and use. An engaging downtown “creates the critical mass of activity that supports retail and restaurants, brings people together in social settings, makes streets feel safe, and encourages people to live and work downtown because of the extensive amenities.”<sup>4</sup> This is further amplified by a high concentration of restaurants, concerts, outdoor events, plazas, parks, and festivals.

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



## Residential Growth

Residential growth signals a fast-changing and vibrant downtown, that has both a daytime working population and activities and people around throughout the day and night. While it has long been of pivotal importance to downtowns, it is of greater importance than ever as traditional workplace dynamics and patterns have changed in the aftermath of the COVID-19 pandemic.

Downtown New Haven's growth rate has been steady and sustained over the past two decades, increasing by 22% since 2000 for an average growth rate of around 1% per year. That's nearly three times the city's growth rate of 8% over the same period. This trend downtown has stood in contrast to a period of minimal growth across the region; from 2000 to 2021, New Haven County grew by slightly less than 5%.

Much of downtown's growth occurred in the decade following the turn of the millennium. Since 2011, the number of people living downtown has fluctuated somewhat without a clear pattern, but remained relatively steady, only barely exceeding 15,000 or falling below 14,000 in the decade from 2011 to 2021. However, this data does not completely capture new unit construction in the last few



Source: U.S. Census (2000), American Community Survey 5-Year estimates (2013–2017, 2017–2021)

years, particularly in the core area traditionally considered downtown, which local research shows grew by 15% between 2010 and 2020.<sup>5</sup>

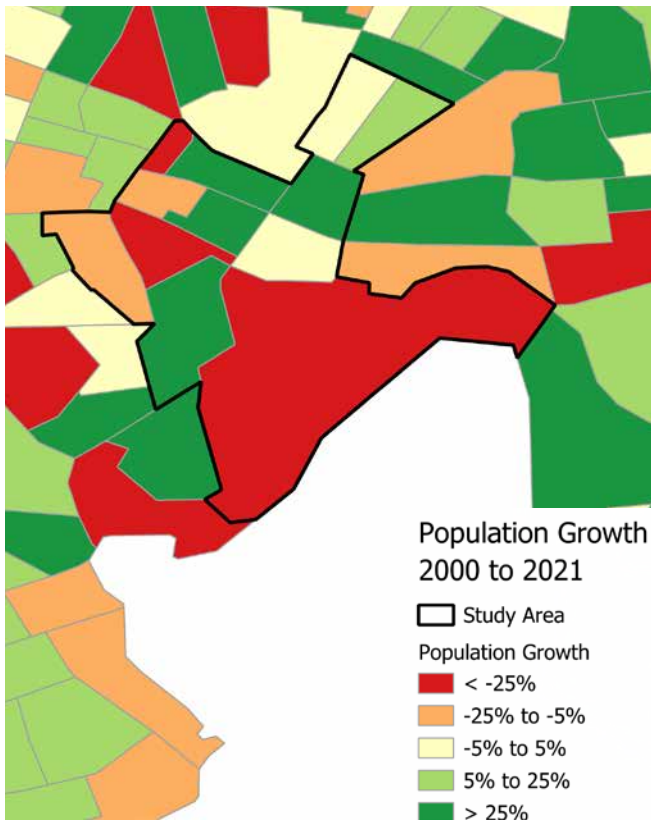
Many of those who have moved downtown in the past two decades may have done so to take advantage of proximity to work. As of 2020, 1,900 downtown residents — approximately 14% of the downtown population — also worked downtown. However, the fact that this group remains a minority also demonstrates that downtown New Haven holds significant residential appeal for quality of life reasons that extend beyond proximity to work such as the availability of cultural and entertainment options, and the ease of getting around on foot.

## Residents

	Downtown New Haven	Established Downtowns	All Study Downtowns Average
GROWTH 2000–2021	22%	56%	50%
DENSITY (RESIDENTS/ACRE)	12	21	12
MEDIAN INCOME	\$50K	\$70K	\$57K
DIVERSITY INDEX	80	69	66

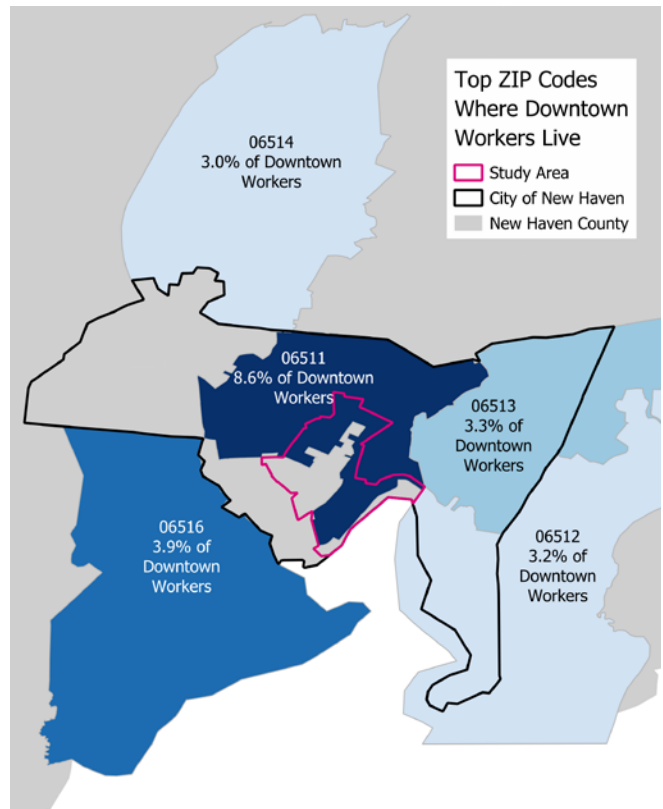
Source: U.S. Census Bureau (2000), American Community Survey 5-Year Estimate (2021), ESRI Business Analyst Online (2022)

## Population Growth



Source: U.S. Census (2000), American Community Survey 5-Year estimates (2017–2021)

## Where Downtown Workers Live



Source: LEHD OnTheMap (2020)

## Retail Vitality

	Downtown	City
RETAIL TRADE BUSINESSES	134	607
FOOD AND DRINK BUSINESSES	219	507
TOTAL STOREFRONTS PER SQUARE MILE	194	61
RETAIL TRADE SALES	\$296M	\$1.2B
FOOD AND DRINK SALES	\$110M	\$233M
TOTAL SALES PER SQUARE MILE	\$224M	\$77M

Source: ESRI Business Analyst Online (2022)



### Retail Vitality

A downtown's retail environment acts as the heart of the community and is a crucial reason for residents, workers, and visitors to come downtown. This is especially true in downtown New Haven, whose exceptional retail environment makes up a significant portion of the city's total retail business. While it is typical for *established* downtowns to concentrate a high share of the city's retail environment, averaging 20% of city-wide sales, downtown New Haven stands above its peers. 28% of all New Haven's retail trade and food and beverage sales occur downtown in just under 10% of the city's land area. This is the second-highest share of citywide retail sales in IDA's study behind only downtown Miami, with its 38% share of the city's retail sales. The high concentration of retail storefronts is especially evident when walking around downtown New Haven, which boasts a storefront density more than three times greater than the city overall. It's also a significant driver of the city's tax base, with total retail sales per square mile that are nearly three times greater than the citywide rate per square mile.

Data indicate that downtown's popularity as a retail destination is only growing. Between 2010 and 2019, employment in the retail trade sector grew by 28%, and in the accommodation and food service sector by 34%. Together, these sectors employed a combined 3,900 people in downtown New Haven by 2019, the most recent year of available data prior to the COVID-19 pandemic. While much will be revealed in the coming years about downtown's post-pandemic resilience, growth in these sectors prior to 2020 indicates that downtown's economic prosperity is likely to remain open and inclusive to the entire city for some time to come.

**Live Events and Activities**

Downtowns often serve their cities as centers of culture and recreation. With its 24 live entertainment venues and three theatres, downtown New Haven’s density of attractions makes it the go-to destination for visitors to the city. Visitors flock downtown to see local and nationally touring bands perform at venues like College Street Music Hall, which can host as many as 2,000 patrons, as well as more intimate settings like BAR and Toad’s Place. Meanwhile, historic venues like the Shubert Theater and the Yale Repertory Theatre host Broadway shows, concerts, and dance performances.

The prevalence of live events and activities drives a robust hotel business downtown, which dominates New Haven’s hospitality market. Eight of the city’s 14 hotels, and almost 70% of its hotel rooms, are located downtown. In addition to lodging, many of these hotels host conferences within their meeting facilities, which compensates for the fact that downtown does not have a traditional dedicated convention center. Despite its impressive local share of hotels, due to its smaller geographic area, downtown has a smaller inventory of hotels and hotel rooms than most *established* downtowns, which average more than three times as many hotels as downtown New Haven. This is also true for the city of New Haven, whose 14 hotels represent less than a third of the average number of hotels in *established* cities.



Source: Town Green District, Market New Haven, DataHaven (2023)

Hotels	Downtown New Haven	Established Downtowns	All Study Downtowns Average	New Haven City	Established Cities
HOTELS	8	25	22	14	51
HOTEL ROOMS	1,154	5,587	4,680	1,690	11,000

Source: Town Green District, Data Haven (2023)



# 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>6</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



London, Madrid, Istanbul, and New Haven have something in common: each earned a mention on the *New York Times*’ list of “52 Places to Go in 2023.” It was high praise for a small city of under 140,000 people, nestled within a region that’s also home to New York City and Boston. But Connecticut’s so-called “cultural capital” is hardly a stopover city; it’s a vibrant destination worthy of making a special trip, whose identity cuts far deeper than just pizza and Yale University.

You can find it all downtown: one of the country’s best food and drink destinations, a world-class live music and entertainment scene, and a massive collection of more than 60 pieces of public art. The city’s legacy and love for the visual arts dates back to the Great Depression, when the Works Progress Administration sponsored the installation of four murals within downtown. It’s been made even larger since, thanks to a Percent for Art in Public Spaces Program that allocates 1% of city construction costs on new or renovated municipal facilities towards the purchase of commissioned artwork. These large-scale works of art join traditional exhibitions housed within the Yale University Art Gallery and privately-owned galleries that dot downtown’s streets. 9 in 10 of New Haven’s nearly 1,000 arts and entertainment workers work downtown, a testament to just how concentrated — and impactful — the industry has become in the city center.

Despite the density of New Haven’s streets, which are among the oldest in America, there is plenty of breathing room in the New Haven Green — a 16-acre site so old that it was drawn into the original 1640 city plan. Famous for its historic architecture and canopy of elm trees, the Green also hosts dozens of large festivals and events, including the International Festival of Arts and Ideas, which drew more than 100,000 people in 2022 and generated nearly \$2.5 million in economic impact back to downtown New Haven.

Parks and public spaces like the Green also contribute to the high quality of life enjoyed by residents of downtown, which was named among the country's 25 best places to live by U.S. News & World Report in 2023.

For New Haveners and travelers alike, the city lives up to its reputation as a destination for the intellectually curious. Museums like downtown's New Haven Museum and the Beinecke Rare Book & Manuscript Library tell stories of the evolution of the Elm City and allow visitors to peer into one of the world's largest collections of rare books, manuscripts, and related materials. Blocks away, the Connecticut Children's Museum offers learning opportunities — and fun — for youth, spread throughout a sprawling facility that engages children through music, math, linguistics, and more. These museums join three others, all located within downtown's relatively small footprint.

And, of course, there's pizza. The city's perfection of a Neapolitan pie with a chewy crust, starting with the pioneer of "New Haven-Style" pizza Frank Pepe, helped put New Haven on the map as a culinary destination. But dozens of other downtown restaurants tell a different story. Within a few blocks' radius, Hachiroku Shokudo & Sake Bar, Chacra, and Noa anchor a new wave of restaurants that reflect the city's rich cultural tapestry. Meanwhile, mainstays like Anchor Spa, Union League Cafe, and Louis' Lunch — certified by the Library of Congress as the inventor of the "hamburger sandwich" — have been serving up meals to hungry New Haveners for generations.

These cultural assets make up what *Condé Nast Traveler* has called the new New Haven: a place "rich with history and character" that has also seen a "renaissance rollicking through the city."<sup>7</sup>

## Destinations & Unique Features



6

MUSEUMS



64

PUBLIC ART  
INSTALLATIONS

2

PARKS AND  
NATURAL AREAS

Source: DataHaven (2023)



## Social Media

INSTAGRAM POSTS WITH #NHV 175,000

INSTAGRAM POSTS WITH #NHVeats 13,100

INSTAGRAM FOLLOWERS @infonewhaven 9,400

FACEBOOK FOLLOWERS @infonewhaven 11,300


X (F.K.A. TWITTER) FOLLOWERS @infonewhaven 6,900

Source: Social Media Counts as of August 9th, 2023

# Resilience | Sustainability, Diversity

Poverty	Downtown	City	Region
RESIDENTS UNDER THE POVERTY THRESHOLD	30%	25%	11%
HOUSEHOLDS WITHOUT A COMPUTER	5%	9%	8%
HOUSEHOLDS WITHOUT INTERNET ACCESS	8%	6%	5%

Source: American Community Survey 5-Year Estimates (2017–2021)

 Health	DOWNTOWN	CITY
AVERAGE LIFE EXPECTANCY	78	79
NO LEISURE-TIME PHYSICAL ACTIVITY	27%	28%
WITHOUT HEALTH INSURANCE COVERAGE	8%	8%

Source: Robert Wood Johnson Foundation (2020); CDC (2017); American Community Survey 5-Year Estimates (2017–2021)

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. Diversity and economic vitality equip downtowns and center cities to adapt to economic and social shocks better than more homogenous communities. Similarly, density better positions downtowns and center cities to make investments needed to hedge against and bounce back from increasingly frequent environmental shocks and stresses.

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

## Economic Resilience

Economic resilience is the ability of a downtown to withstand adverse economic conditions, such as the COVID-19 pandemic, by having a mix of factors essential to continual long-term success. Bringing together a mix of industries with a talented workforce makes downtown both a competitive and economically resilient environment.

New Haven's downtown employment landscape is primarily dominated by two primary industries, educational services and healthcare and social assistance, which are connected through a single institution, Yale University. These industries have historically been considered stabilizing influences for downtowns and center cities, providing a steady source of employment while also proving to be less vulnerable to economic fluctuations than other sectors.

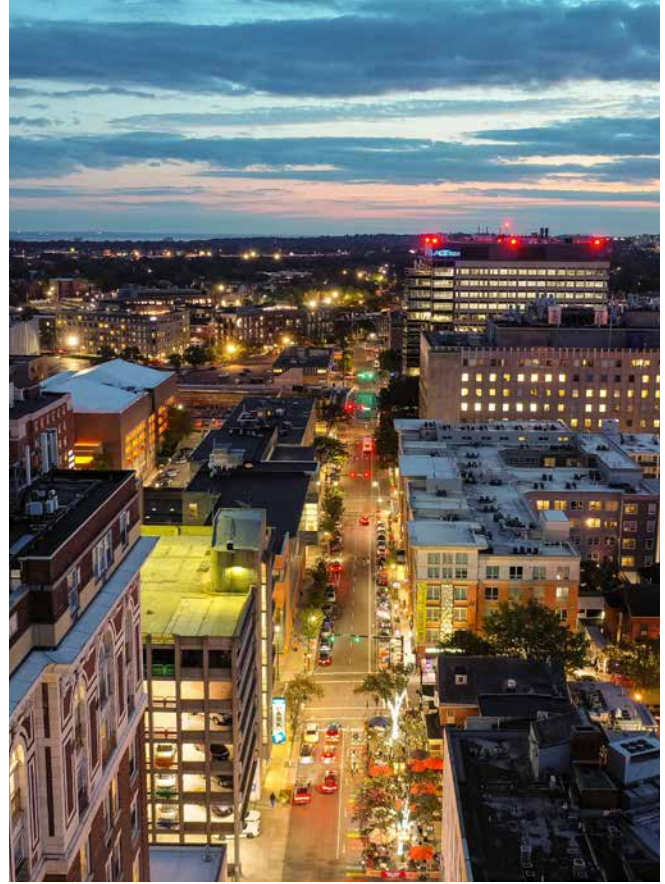
At the same time, downtown New Haven is home to a larger share of residents in poverty at 30%, according to ACS data. This is slightly higher than city levels, but both downtown and the city are far above New Haven County's share of impoverished residents. The City of New Haven has an extensive social services network compared to the rest of the region, which is available to respond to the disproportionately high share of those experiencing poverty within the city limits.



### Social Resilience

Downtowns act as hubs for social resilience. Their dense nature gives a diverse mix of residents and employees access to a multitude of community resources in a small area. With access to 22 religious institutions, two libraries, New Haven Green, and the campus of Yale University, downtown residents enjoy several “third places,” which provide many physical and mental health benefits. Together, these spaces contribute to a life expectancy for downtown residents that’s slightly higher than the U.S. average. Meanwhile, roughly one-quarter of those who live downtown don’t participate in any leisure-time activity, and 8% are uninsured — shares that are nearly identical to trends elsewhere in the city.

As more work, schooling, entertainment, and other daily activities move online — a shift accelerated by the public health response to COVID-19 — access to a suitable computer or mobile device and to reliable internet service has grown increasingly important. 95% of downtown households have access to a computer, and 92% of downtown households have internet access. These figures are roughly in line with the city and region, showing that downtown has a high degree of digital connectivity despite slightly higher rates of poverty. This provides the downtown community with an elevated level of resilience and access to information, communication, and resources in times of crisis or emergency.



## Downtown Community Resources



2

LIBRARIES



22

RELIGIOUS  
INSTITUTIONS

2

PARKS AND  
NATURAL AREAS

2

POSTSECONDARY  
INSTITUTIONS

20,479

POSTSECONDARY  
STUDENTS

Source: DataHaven (2023)

Note: Libraries figure does not include Yale University libraries

# Environmental Resilience



## DOWNTOWN

LEED BUILDINGS	14
ELECTRIC CAR CHARGING POINTS	37
ACRES OF OPEN SPACE	17
ANNUAL GHG EMISSIONS PER HOUSEHOLD	2.9

### Environmental Resilience

A downtown’s environmental resilience plays a major role in assuring long-term sustainability in its region. By most sustainability metrics evaluated for this study, residents of downtown New Haven are leading the way, far exceeding their neighbors elsewhere in the city and positioning New Haven among the top U.S. downtowns and center cities. With only 42% of downtown residents “driving alone” as their primary means of getting to work, downtown New Haven is topped by only four out of 49 other downtowns in our study. These residents are heavily incentivized to find alternate modes of transportation thanks to a Walk Score and Bike Score that are near the top of the possible scale at 96 and 95, respectively. These scores indicate that downtown’s sidewalks and bike lanes are especially conducive to safely navigating the city by foot or bike — by a measure that’s roughly 30 points higher than elsewhere in the city.

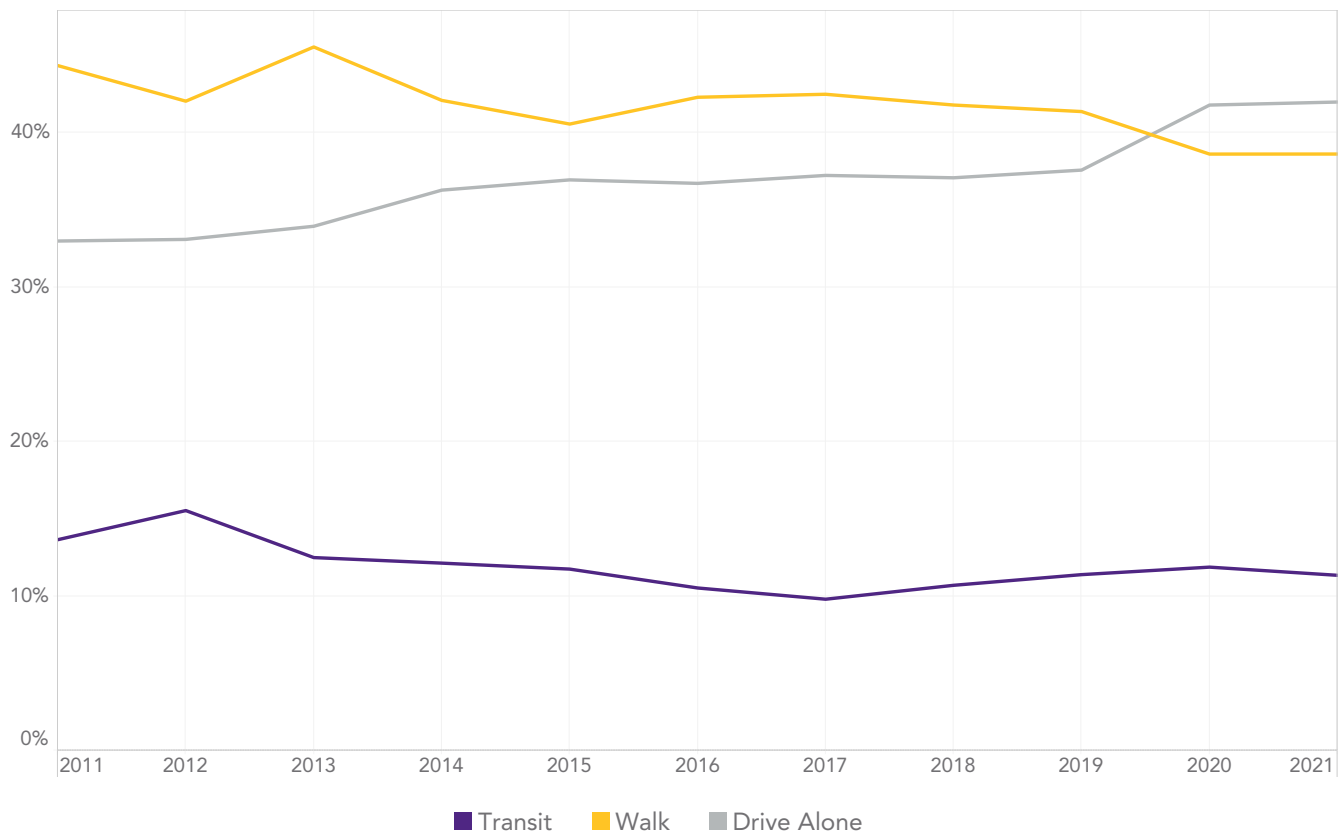
Source: US Green Buildings Council (2023), DataHaven (2023)



An impressive share of downtown residents — 39% — walk to work as their primary means of commuting. That’s nearly as many as residents who drive, which has helped push the share of downtown’s sustainable commutes to 58% — more than double the average for all downtowns in our study. Over time, however, the share of downtown New Haven residents who drive to work has been gradually increasing, which stands to reverse commuting trends that have overwhelmingly

positive. Just over ten years ago, the share of residents who drove alone as part of their commute sat seven percentage points lower at 35%. This trend has possibly been influenced by downtown’s appeal to new residents who do not also work downtown, and for whom walking to work is not a realistic option. This increase in 2020 and 2021 may partly be explained by a lower share of overall commuters due to a pandemic-era shift to remote work. Time will tell if this trend holds, as data beyond 2021 was not yet available as of the date this report was published.

## Downtown Commute Mode Share



Source: American Community Survey 5-Year Estimates (2011–2021)



SUSTAINABLE COMMUTE



DOWNTOWN  
NEW HAVEN  
58%

ESTABLISHED  
DOWNTOWNS  
39%

ALL STUDY  
DOWNTOWNS  
AVERAGE  
28%

NEW  
HAVEN  
CITY  
36%

ESTABLISHED  
CITIES  
22%

Source: American Community Survey 5-Year Estimates (2017–2021)

Mobility Scores

	Downtown	City
WALK 	96	68
BIKE 	95	66
TRANSIT 	74	49

Source: Walk Score (2023)

Downtown  
Commuting Patterns

BIKE 	Downtown 3%	City 2%
TRANSIT 	Downtown 11%	City 10%
CARPOOL 	Downtown 4%	City 9%
WALK 	Downtown 39%	City 13%
DRIVE ALONE 	Downtown 42%	City 64%

Source: American Community Survey 5 Year Estimates (2017–2021)

# Downtown Profile | Summary

The *Value of U.S. Downtowns and Center Cities* study categorizes American districts into three development stages: *established*, *growing*, and *emerging*. These tiers are determined by various metrics, including population and job density, growth rate, and assessed land value per square mile. As a result of its high density and significant citywide contributions in jobs, population, and land value, New Haven ranks in the *established* tier.

It's difficult to overstate the economic importance of downtown New Haven. Even compared to other *established* downtowns, which are home to 43% of their cities' jobs on average, New Haven stands out with its impressive 70% share of the city's jobs. Only downtown Miami comes close in share of citywide jobs at 64%. Equally impressive is the rate of growth in downtown employment; its 59,000 jobs represent a 25% increase in primary employment since 2002, the second fastest rate of growth among *established* downtowns, behind only San Francisco's colossal 61% job growth.

Downtown New Haven also stands out when it comes to its presence of retail and restaurants. 28% of all New Haven's retail trade and food and beverage sales occur downtown in just under 10% of the city's land area, for a share that's greater than 48 of the 49 cities in IDA's study. Only downtown Miami has a higher share of citywide sales. This heavy concentration of shopping and dining options has a significant impact on the retail vibrancy of downtown New Haven, which boasts a storefront density more than three times greater than the city overall. It's also a major driver of the city's tax base, with total retail sales per square mile that is also nearly three times greater than the citywide rate per square mile. Together with its 24 live entertainment venues and three theatres, downtown New Haven's density of attractions makes it the go-to destination for visitors to the city. As a result, almost 70% of the city's hotel rooms are located downtown.

## Established Downtowns

BALTIMORE	MINNEAPOLIS	SAINT PAUL
FORT LAUDERDALE	<b>NEW HAVEN</b>	SAN FRANCISCO
MIAMI	PITTSBURGH	SEATTLE
MILWAUKEE	RICHMOND	WEST PALM BEACH



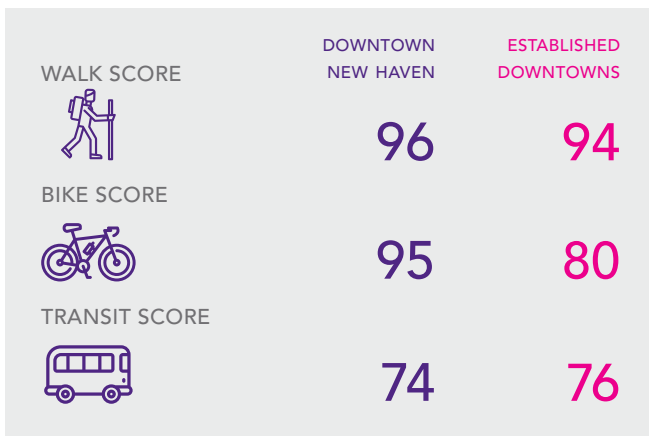
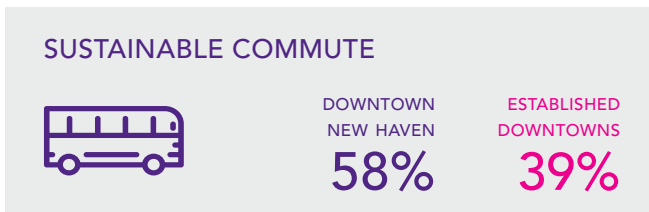
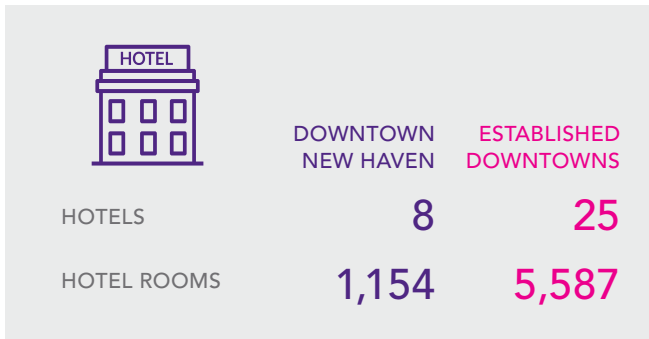
## RESIDENTS

	DOWNTOWN NEW HAVEN	ESTABLISHED DOWNTOWNS
<b>GROWTH</b> AVG. 2000-2021	22%	56%
<b>MEDIAN INCOME</b> HOUSEHOLD	\$50K	\$70K
<b>DIVERSITY INDEX</b>	80	69



## EMPLOYMENT

	DOWNTOWN NEW HAVEN	ESTABLISHED DOWNTOWNS
EMPLOYMENT GROWTH (2002-2020)	25%	13%
CITYWIDE JOBS	70%	43%
CITYWIDE KNOWLEDGE JOBS	59%	47%
CITYWIDE CREATIVE JOBS	87%	46%
RESIDENTS WITH A BACHELOR'S DEGREE OR HIGHER	56%	58%



A plethora of things to see and do also boost downtown’s livability, which led to the growth of downtown’s population by 22% between 2000 and 2021. Even though this rate is roughly half as fast as other *established* downtowns, it’s locally significant; within the same period, the city of New Haven grew at 8%, less than a third the pace of downtown population growth. These residents are socioeconomically diverse, with a relatively balanced distribution of income levels that is generally consistent with the city as a whole. They are also racially diverse, with 62% of downtown’s population identifying as non-White. This diversity is reflected in downtown’s Diversity Index score of 80, suggesting a high chance that two randomly selected residents will belong to different racial backgrounds. Only six other downtowns in our entire study score higher, and among *established* downtowns, only Miami has a higher Diversity Index.

In a post-pandemic era in which the relevance of U.S. downtowns has been questioned, downtown New Haven exemplifies extraordinary resilience across economic, social, and environmental dimensions, making it well-equipped to absorb future shocks and stresses. Its diverse mix of community resources, including 22 religious institutions, two libraries, New Haven Green, and the campus of Yale University, bolsters social resilience, while its high levels of digital connectivity provide added stability in times of crisis. Meanwhile, downtown is a pedestrian and bicyclist’s paradise, boasting near-perfect Walk Score and Bike Score ratings. As a result, a minority of downtown residents, just 42%, choose to “drive alone” as their main means of getting to work, making downtown New Haven one of the most sustainable downtowns in IDA’s study.

Considering these many advantages, downtown New Haven is poised for continued success in future years as an *established* downtown.





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# 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 the 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 over 40 more 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 49 total 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 authentic, cultural and historical heritage?
- How does the diversity of a downtown 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.



## KNOWN LIMITS TO THIS PROJECT

While this study aims to provide a comprehensive quantification of the value of downtowns, there are still several limitations to our approach. Not all local sources consistently collect the same data, or collect it in the same way, which hinders our ability to make comparisons between downtowns. In some cases, the data we ask for simply does not exist or has not been collected on the relatively small scale of census tracts or downtown sub-area. This makes it challenging to rely on local data for analysis and can result in some missing pieces in our narrative. Our most recent data also comes predominantly from the 2021 American Community Survey (ACS), the 2020 Longitudinal Employer-Household Dynamics (LEHD) On the Map tool, and ESRI Business Analyst. Due to the lag in data availability,

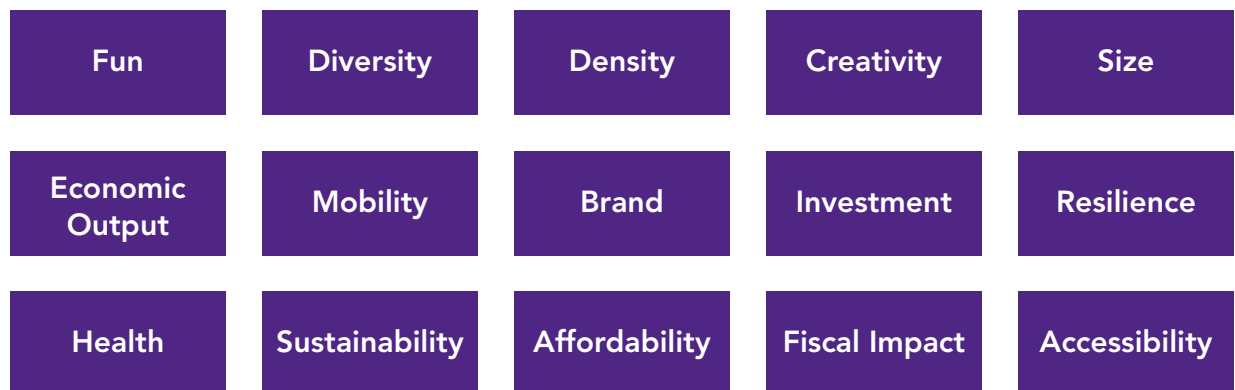
some metrics may not align with more recent data from local downtown, municipal, or proprietary sources. This will be especially true in coming years as the recovery in employment following the COVID-19 pandemic will not be observed in our data sources for a few years.

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



## Discussion: 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. These included fun, diversity, density, creativity, size, economic output, mobility, brand, investment, resiliency, health, sustainability, affordability, fiscal impact and accessibility.



### DETERMINING PRINCIPLES FOR A VALUABLE DOWNTOWN

This project began with a Principles and Metrics Workshop held in 2017 with representatives of UPMOs from the 13 pilot downtowns. The workshop focused on developing value principles that collectively capture a downtown's multiple functions and qualities, and its contributions to the city and region. Through this discussion, the participants grouped the value principles into five categories, which provided the basis for determining benchmarking metrics.

Downtown advocates tailor their arguments to the interests of different audiences. For instance, within the economy argument, 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 value statements. 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 meet the goal of providing metrics that allow comparisons across jurisdictions, we made sure necessary comparison data was available for every (or almost every) downtown, city, and region. Data would ideally 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 were reliably able to obtain metrics like population, employment, or assessed value – less reliably obtaining downtown visitors, hotel tax revenue. For this reason, our comparisons across jurisdictions focus on those more commonly available metrics.

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

Metrics and comparisons are analyzed to develop value statements of the 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 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 their financial services sector is healthy and thriving. Comparisons to the growth of this industry sector in other downtowns, or concentration of financial services jobs relative to other downtowns would highlight the strength of their downtown's appeal to the financial services sector.

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

For this level, the UPMO could include news reports of new financial services companies choosing to place offices downtown. An interview with a company executive on why they 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 downtown's unique value to the city.



## DEFINING DOWNTOWN

This study developed a definition of the commercial downtown that moved beyond the boundaries of a development authority or a business improvement district. For one thing, geographic parameters vary across data sources and may not align with a UPMO's jurisdiction.

Urban place management organizations vary widely in terms of their geographic definition. To make boundaries replicable and comparable across data sources, the study team recommended aligning each downtown 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 are only adjusted once every 10 years.

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 subdivide or combine block groups with each decennial census, 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 selection 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 spend the first phase of the project collecting data for the study. IDA collects data primarily from national databases (see Appendix 3 for data sources), and the local partner works 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.

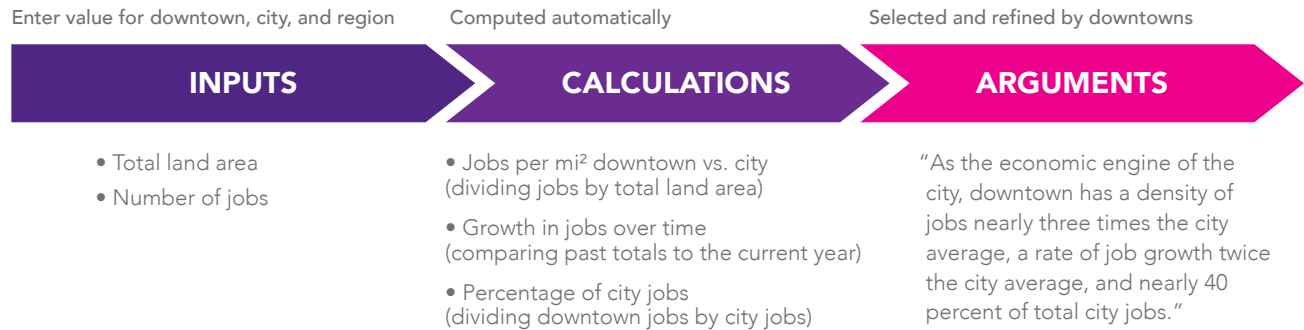
### CALCULATIONS AND ANALYSIS

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

- 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

This analysis is applied across all years collected and all applicable geographies to inform trends over time and within larger contexts. The flow chart of inputs, calculations, and arguments demonstrates how we go 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 the 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 49 downtowns that have participated to date into “established”, “growing” and “emerging” tiers. Downtown figures were compared to study-wide medians on three themes:

- 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 (2002–2020)
  - o Percent growth in population (2000–2021)

**Established** – These downtowns have 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 are showing progress towards that critical mass. This group includes both larger downtowns with lower growth rates, and smaller downtowns with exceptional growth rates.

**Emerging** – These downtowns are a mixture of different sizes and growth rates, and are generally lower-density downtowns that have a low proportion of citywide significance on jobs and residents. Because growth rates are examined 2000 to current, many downtowns that struggled during the recession had a harder time demonstrating significant growth over the longer term despite encouraging 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 making up a small fraction of the 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 collected for comparison:

- 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
- Invested 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, across all ages. This diversity ensures that as an inclusive place, it has a broad appeal to all users and a strong social fabric. Downtowns provide access to all to opportunity, essential services, culture, recreation, entertainment and civic activities.



**Illustrative metrics collected for comparison:**

- 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
- 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. Within a downtown creates an attraction and buzz. As the cultural center of their cities, downtowns typically attract a large share of citywide visitors and are the location of 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 collected for comparison:**

- 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 Market Potential Index (ESRI MPI)
- Retail sales (retail trade and food & drink)
- Retail space in pipeline
- Retail space inventory
- Retail space under construction
- Theatres
- 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 authentic cultural offerings in downtown enhance its character, heritage, and beauty, and create an environment that is not easily replicable in other parts of the city. 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. *Downtown preserves heritage, connects regional residents, and contributes positively to the regional brand.*

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 collected for comparison:

- 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 the diversity and density of resources and services, center cities and their inhabitants can better absorb economic, social, and environmental shocks and stresses than their surrounding cities and regions. The diversity and economic strengths of 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 disproportionately affect less economically and socially dynamic areas.



**Illustrative metrics collected for comparison:**

- 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
- Resident population in poverty
- Scooters
- Solid waste generation
- 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, market potential, and Consumer Spending	Proprietary	None; allows for drawing of custom geographies; selection of sub-geographies down to census tracts	2017 to 2022 by data set (Annual Updates)
Social Explorer	Demographic, Housing, Crime, Health	Proprietary	Allows for selection of sub-geographies down to the census block group level	2021 (Annual Updates)
American FactFinder	Demographic, Housing, Crime, Health, Employment, Economy	Public	Allows for selection of sub-geographies down to the census block group level	2021 (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	2020 (Annual Updates)
Center for Neighborhood Technology	Housing affordability, Sustainability, Income	Public	Allows for selection and exporting at as small as the block group level	2019 (Updates Unscheduled)
National Register of Historic Places	Historic structures and districts	Public	None	2022 (Annual Updates)
Centers for Disease Control and Prevention	Life expectancy, physical inactivity and other health data	Public	ZIP Code	2021 (Annual Updates)
FBI Uniform Crime Reporting	Crime Rates	Public	City and Metro	2022 (Annual Updates)
Geolounge	Map of Fortune 1000 companies	Public	None	2018 (Unscheduled Updates)
Zillow	Housing and rental costs	Public	The smallest geographies are arbitrarily designated "neighborhoods" some of which line up with the study areas while others do not or do not exist. In these cases, we got as close as we could with a zip code	April to June Annually (Monthly 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.

## Market Potential Index

ESRI Market Potential Index measures the likelihood of residents in a set area to spend money on specified categories of goods and services, indexed to a national average. Values below 100 indicate a below average demand from residents in the area, and above 100 an above average demand.

### Media mentions

This study sometimes utilizes independent sources to add nuance to the data. Forbes' list of top 100 metro areas to start a new business is an example of this type of source. Another example might be a travel blog praising restaurants or entertainment options within the downtown. While not always quantitative sources, these 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.

*Defining Downtowns—Downtown Rebirth:* 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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