



INSPIRED LEADERS
SHAPING CITIES

IDA Vitality Index

EXECUTIVE SUMMARY

Downtowns, center cities, and commercial districts have enjoyed a resurgence of growth, livability, and accessibility in the past two decades, and urban place management organizations have flourished alongside this growth. Beyond being a great place, what key characteristics make a downtown vital, strong and active? Downtowns and commercial districts should have dynamic economies that create opportunity; make it available to everyone; and draw people for work, play, and living.

The IDA Vitality Index, powered by Stantec, functions as an interactive, online tool for benchmarking the vitality of downtowns across the U.S. The Vitality Index builds on IDA's pioneering research in *The Value of U.S. Downtowns and City Centers* (VODT), and measures vitality through three principles that study identified: Economy, Inclusion, and Vibrancy. Through these three principles, each comprising five core indicators, the Vitality Index aims to enable urban place managers to quantify and benchmark a district's performance against peer cities. The index uses a benchmarking system to understand how each of the three principles contributes to an overall combined score calculated by comparing each metric to a national average. Most valuable, it establishes a baseline and provides a data-driven method for a community to measure its improvement over time.

The inaugural Vitality Index includes data from 31 downtowns across the U.S., all of which have dynamic urban place management organizations that participated in IDA's *Value of Downtowns* study. Future editions of the Vitality Index will expand to additional districts across the U.S.

KEY FINDINGS

Nearly all downtowns outperformed the national average in vitality.

26 of the 31 downtowns in the study score at or above 50, the national benchmark. (A score above 50 means that a downtown's vitality metrics outperform those of the nation as a whole.) The remaining five downtowns come within four points of the national benchmark, which identifies them as performing solidly though slightly below the national average. These results against the national benchmark clearly show downtowns as concentrated centers of vitality.

All downtowns in the study score highly on vibrancy, well above the national average.

Perhaps unsurprisingly, all downtowns proved extremely vibrant, scoring well above the benchmark score of 50 on this principle. Whether small, like Ann Arbor, or large, like Seattle, downtowns act as magnets for residential growth, have strong retail and restaurant sectors, and serve as walkable cores.

The most vital downtowns have dynamic economies that strongly outperformed the national average.

The downtowns scoring highest on Economy all have extremely high job densities.

All downtowns can improve on Inclusion, but downtowns tracked close to metro averages in being inclusive homes for all residents.

Inclusion scores lagged in most districts, not because of a lack of racial diversity, but because of higher costs of living. Compared to residents citywide, downtown residents spend a lower proportion of their incomes on housing costs and transportation. People who want to own their home in downtown, however, face a potentially serious obstacle: the typical downtown offers few affordable ownership options for median-income households.

Vitality doesn't correlate reliably with downtown size.

All downtowns can be vital. Although large cities like Chicago or San Francisco do contain downtowns synonymous with vibrancy, district size in this study showed no correlation with downtown vitality. The downtowns with the five highest vitality averages varied in size from 0.2 square miles to 3.71 square miles.

The Vitality Index presents three views of downtown vitality:

- 1 **Overall Vitality Score** – a summary of the overall vitality score for each downtown and how it compares to the national average
- 2 **Three Principles Chart** – a comparison of how each downtown performs on the three principles of Economy, Inclusion, and Vibrancy
- 3 **Principle Metrics by Tier** – a more detailed analysis of how downtowns in different tiers (established, growing, emerging) perform on the metrics that make up each principle

SCORING OVERVIEW

The Vitality Index shows how much a downtown outperforms or underperforms the national/citywide benchmark. To develop the score, our study team normalized the benchmark for each metric to 50. We generally compare downtown performance to national performance – based on the premise that downtowns are generally more vital, more dynamic places than the nation as a whole.

Why is vitality important?

In recent years, cities across the country—driven by a renaissance of downtowns across the country—have experienced renewed growth and investment. By many measures, downtowns have become successful, thriving districts. Yet how do you measure that success in a standardized way across many different contexts?

A vital downtown is a critical component of a thriving city and region. Though the function of the district varies from place to place—whether as employment hub, tourism driver, residential home or center for shopping—a strong central district anchors a region and propels its growth. *The Value of U.S. Downtowns and Center Cities*, IDA's ongoing analysis of the holistic impact downtowns have on their cities and regions, demonstrates that central districts of all sizes play an outsized role in economy, inclusion, vibrancy, identity, and resilience—five essential components of downtown value.

The launch of the Vitality Index gives downtowns and commercial districts a tool for benchmarking their vitality against their peers. The Vitality Index focuses on peer-to-peer comparisons, and while sizes of both the district and city do influence several of these metrics we wanted to study districts as they stand on their own and evaluate how they perform against comparable districts.

The Vitality Index distills the complex elements of downtowns into three broad principles with five indicators each. Understanding a downtown's vitality performance and how it changes over time will offer districts insight into their strengths and weaknesses. That insight can help downtown districts identify areas that need improvement and focus strategic investment on them.

The Three Principles

ECONOMY

Economy refers to the economic strength and stability of the downtown. Traditionally, most downtowns serve as their city's central business district. Once in decline following the exodus of businesses to suburban locations, contemporary downtowns have reemerged as attractive centers for jobs, business, and talent.

METRIC	DEFINITION	BENCHMARK	SOURCE
Job Growth (2010–2017)	% change in total primary jobs between 2010 and 2017	U.S. average: 12%	LEHD On the Map (2010, 2017)*
Job Density	# of total primary jobs divided by district land areas	Average of top 94 metros in U.S.: 25,994 jobs/sq mi.	LEHD On the Map (2017); Benchmark from Brookings analysis (2019)**
Educational Attainment	% of residents over age 25 with educational attainment of a bachelor's degree or higher	U.S. average: 31%	American Community Survey 5-Year Estimates (2013–2017)
Knowledge Jobs	% of all downtown jobs in knowledge industries (NAICS categories: finance and insurance, real estate and rental and leasing, professional, scientific, and technical services, management of companies and enterprises, health care and social assistance)	U.S. average: 26%	LEHD On the Map (2017)
Unemployment (2017)	% of labor force that is unemployed	U.S. average: 6.6%	American Community Survey 5-Year Estimates (2013–2017)

* LEHD On the Map is part of the Longitudinal Employer-Household Dynamics program within the Center for Economic Studies at the U.S. Census Bureau.

** Shearer, C., Vey, J. and Kim, J. (2019, June 18). Where jobs are concentrating and why it matters to cities and regions. Brookings Institution. Retrieved from <https://www.brookings.edu/research/where-jobs-are-concentrating-why-it-matters-to-cities-and-regions/>

The Three Principles

INCLUSION

As the literal and figurative heart of the city, does a downtown represent and welcome residents, employees and visitors from all walks of life? Downtowns should support residents of all incomes, races and ethnicities, genders, and ages.

METRIC	DEFINITION	BENCHMARK	SOURCE
Diversity Index	Probability that any two residents are of a different race or ethnicity	Average for 31 metros studied: 63	ESRI Business Analyst (2019)
Housing and Transportation Cost	% of the average household's income spent on housing and transportation	Average for 31 metros studied: 51	Center for Neighborhood Technology (2019)
Middle-Income Households	% of households making between 67% and 200% of the AMI	Average for 31 metros studied: 47%	American Community Survey 5-Year Estimates (2013–2017)
Home Price/Income Ratio	Ratio of median value of owner-occupied homes to median household income in the district	Average for 31 metros studied: 4	American Community Survey 5-Year Estimates (2013–2017)
% Children + Seniors	% of residents who are <18 or >65 years old	Average for 31 metros studied: 37%	American Community Survey 5-Year Estimates (2013–2017)

The Three Principles

VIBRANCY

As dense hubs of people living, working, and playing, downtowns are full of life. Vibrant downtowns have a buzz of activity, people on the street, and, above all, a sense of place that marks the district as a place to be and be seen.

METRIC	DEFINITION	BENCHMARK	SOURCE
Population Growth (2010–2017)	% change in population between 2010–2017	U.S. Average: 4%	American Community Survey 5-Year Estimates (2013–2017)
Population Density	Percentage of residents divided by district land area	Population-weighted density for all metros: 6,321 people/sq mi.	American Community Survey 5-Year Estimates (2013–2017); Benchmark from CityLab Richard Florida*
Shop and Restaurant Density	# of retail and food-and-drink businesses divided by district land area	Average for 31 cities studied: 48	ESRI Business Analyst (2019)
Walk Score	The walkability of any district, based upon routes to nearby amenities	Top 100 Cities Average: 48	Walk Score (2019)
% Sustainable Commute	% of residents who do not drive alone to work	U.S. Average: 32%	American Community Survey 5-Year Estimates (2013–2017)

* Florida, R. (Oct 15, 2012). America's Truly Densest Metros. Citylab. Retrieved from <https://www.citylab.com/equity/2012/10/americas-truly-densest-metros/3450/>

SCORING METHODOLOGY

The Index indicates whether and by how much a downtown outperforms or underperforms national/metro benchmarks. To develop the score, we normalized the benchmark to 50 for each metric. For most metrics we compared downtown performance to national performance – based on the premise that downtowns are generally more vital and dynamic than the nation as a whole.

For job density and population density, we set the benchmark as the average for the largest 100 metros (depending on data availability), in order to focus on how urban areas like downtown compare to urban regions.

We took the difference between a benchmark and each downtown's score for that metric and converted it to a score on the scale of 0 – 100. For example, Indianapolis experienced 13% job growth between 2010 and 2017. The U.S. had 12% job growth in the same period. With the benchmark set at 50, Indianapolis scored 51 on job growth, as it slightly overperformed compared to the U.S. metric.

For the remaining metrics, including all those under the Inclusion principle, we compared each district to the average of the 31 metro areas – both to compare urban areas to their cities, and to reflect the fact that downtowns are typically more vital places than their regions.

We calculated a score for each principle, and then averaged the three principles to derive an overall vitality score.

TIERS

One additional layer of analysis established tiers for categorizing the downtowns and districts studied. These tiers don't represent the age of a district but attempt to group downtowns that have reached comparable stages of maturity in their development. **Established** downtowns are home to a large percentage of citywide residents, jobs, and assessed value. **Growing** downtowns are those with the fastest-growing populations and job counts. Finally, **emerging** downtowns show rapid growth in either residents or jobs (though not both), or have begun to show positive signs of growth.

These tiers, developed through a separate methodology for the Value of Downtowns study, don't directly reflect the Vitality Index scoring. We used several metrics to establish the tiers:

Density

- Jobs per square mile
- Residents per square mile
- Assessed value per square mile

Significance to city

- Percentage of citywide jobs
- Percentage of citywide residents

Long-term growth

- Percent growth in jobs (2002 – 2017)
- Percent growth in population (2000 – 2017)

In short, tiers do not correspond directly to vitality scores. For example, downtown Charlotte has a vitality score of 59, higher than some established districts, but it ranks in the "growing" tier based on metrics outside of the ones used to calculate its vitality score.

DEFINING BOUNDARIES

Each district combined census tracts or block groups that most closely match that downtown's boundaries. In each community, IDA's member place management organization applied its local knowledge to assure close alignment between the two. The Appendix contains the maps of all study areas created with this method.

The downtowns studied for the Vitality Index vary widely in size and, as noted, reflect the local urban place management organization's assessment of where to set the boundaries. For example, the study area for Dallas includes the entire 11-square-mile Dallas City Center area, which covers a 2.5-mile radius around downtown. This is consistent with how Downtown Dallas, Inc. defines their city center boundary.

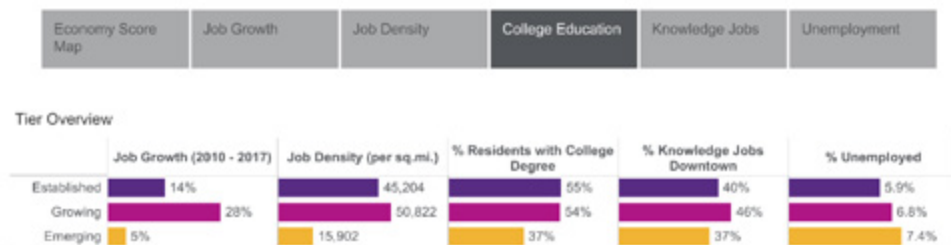
FUTURE RESEARCH

The Vitality Index project aims to create a definitive and universally applicable benchmark for measuring the vitality of all downtown districts. IDA intends to expand this research to cover the downtown of the 100 largest cities in the U.S. and to cover all IDA members. Future research will also expand the index to include metrics that capture the identity of a downtown (e.g., museums, sports, events) as well as metrics on the environmental resilience of the district.

IDA will update the Vitality Index annually following the release of new data from the American Community Survey and LEHD.

MEMBER-FACING RESOURCE

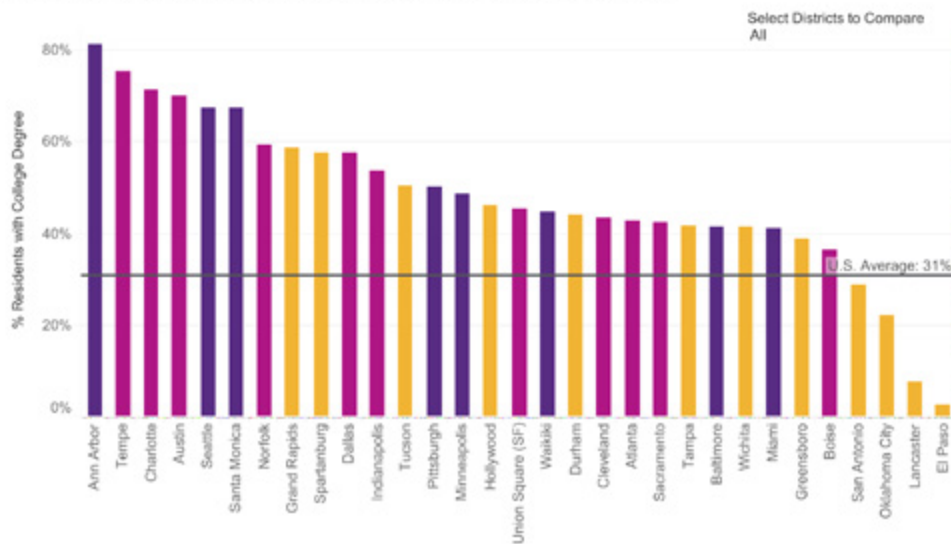
IDA members can access detailed charts and interactive tools that provide additional information on each of the metrics used to determine their scores for the principles of Economy, Inclusion, and Vibrancy. Comparison within tiers and by individual metrics allows districts to better understand opportunities for strategic growth. Members can select specific districts for comparison and view additional information by hovering over the district they are interested in.



College-Educated Residents

Employers seek a strong workforce when making location decisions. Downtowns that have a high number of college-educated residents have greater success attracting and retaining employers. In addition, college-educated residents contribute to a more resilient economy, as their educational attainment gives them more options for adapting to economic shocks. Growing and established downtowns have about the same percentage of college-educated residents, but a significant gap exists between those tiers and emerging downtowns.

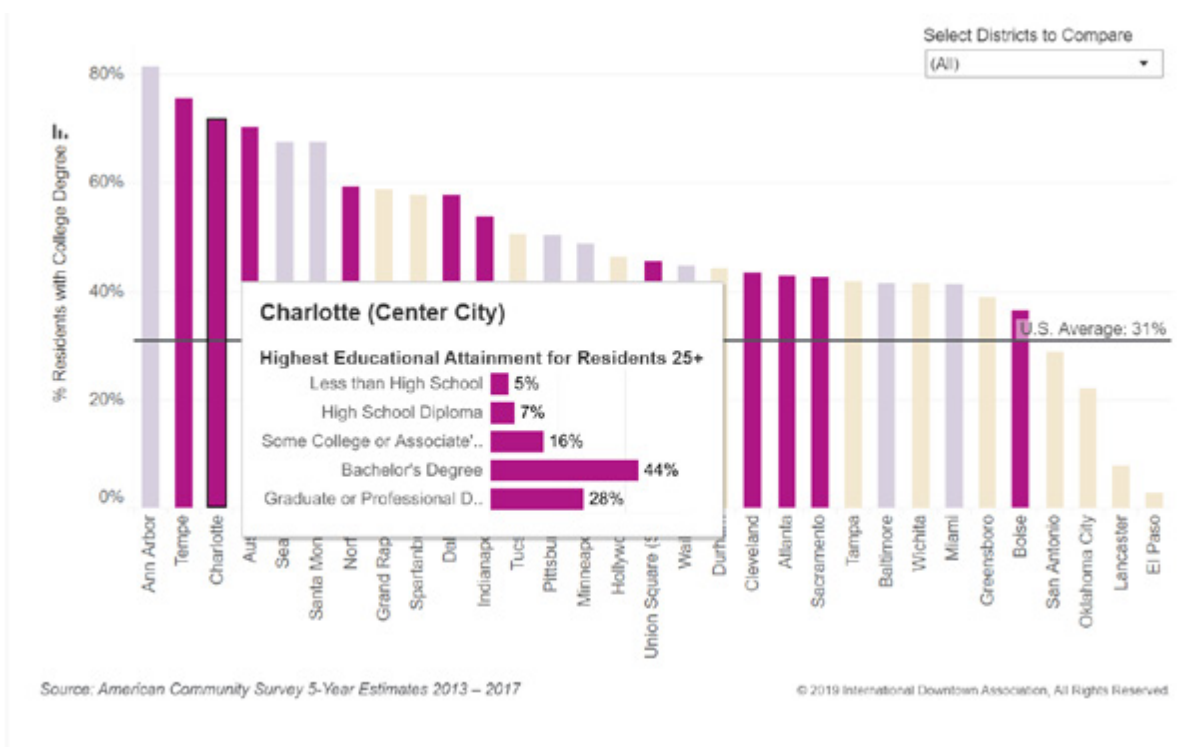
Hover over each downtown to see the breakdown of educational attainment for district residents.



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

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MEMBER-FACING RESOURCE





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.

IDA Board Chair: Tami Door, President & CEO, Downtown Denver Partnership

IDA President & CEO: David T. Downey, CAE, Assoc. AIA, IOM

IDA Research Committee

The IDA Research Committee comprises industry experts who help IDA align strategic goals and top issues to produce high-quality research products informing both IDA members and the place management industry. Chaired and led by IDA Board members, the 2019 Research Committee continues the work set forth in the IDA research agenda, publishing best practices and case studies on top issues facing urban districts, establishing data standards to calculate the value of center cities, and furthering industry benchmarking.

IDA Research Committee Chair: Brian Douglas Scott, Principal, BDS Planning & Urban Design

IDA Director of Research: Cathy Lin, AICP

IDA Research Coordinator: Tyler Breazeale

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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.

Vice President, Urban Places Planning and Urban Design Leader: David Dixon, FAIA

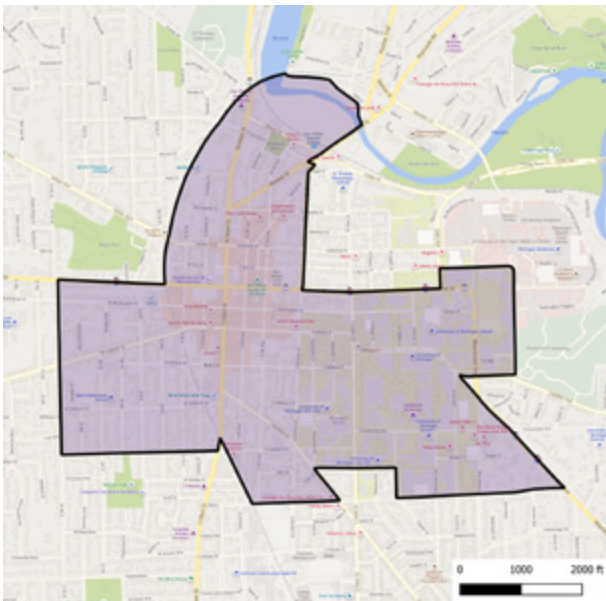
Principal: Craig Lewis, FAICP, LEED AP, CNU-A

IDA would like to thank the following organizations for their efforts on the 2019 edition of this project:

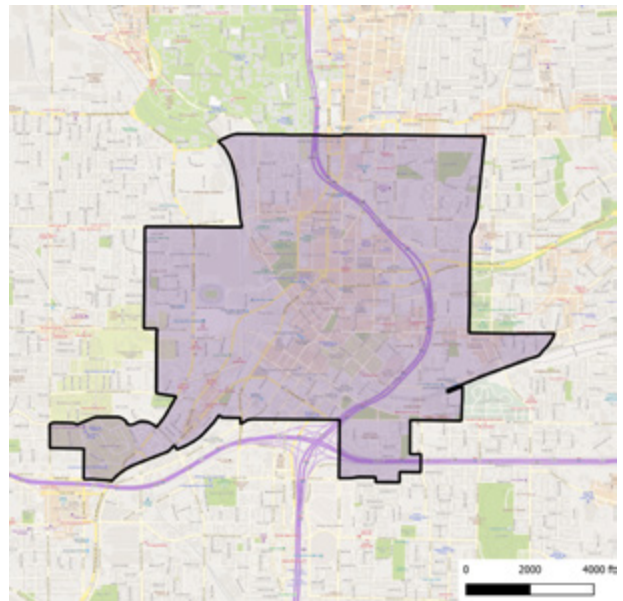
Ann Arbor Downtown Development Authority	Downtown Norfolk Council
Atlanta Downtown	Downtown Oklahoma City Partnership
Downtown Austin Alliance	Pittsburgh Downtown Partnership
Downtown Partnership of Baltimore, Inc.	Downtown Sacramento Partnership
Downtown Boise Association	Centro San Antonio
Charlotte Center City Partners	Union Square BID
Downtown Cleveland Alliance	Downtown Santa Monica, Inc.
Downtown Dallas, Inc.	Downtown Seattle Association
Downtown Durham, Inc.	Spartanburg Downtown Development Partnership
El Paso Downtown Management District	Tampa Downtown Partnership
Downtown Grand Rapids, Inc.	Downtown Tempe Authority
Downtown Greensboro Inc.	Downtown Tucson Partnership
Hollywood Entertainment District	Waikiki Business Improvement District Association
Downtown Indy, Inc.	Wichita Downtown Development Corporation
BLVD Association	
Miami Downtown Development Authority	
Mpls Downtown Council	

Downtown or commercial district boundary maps

ANN ARBOR, MI



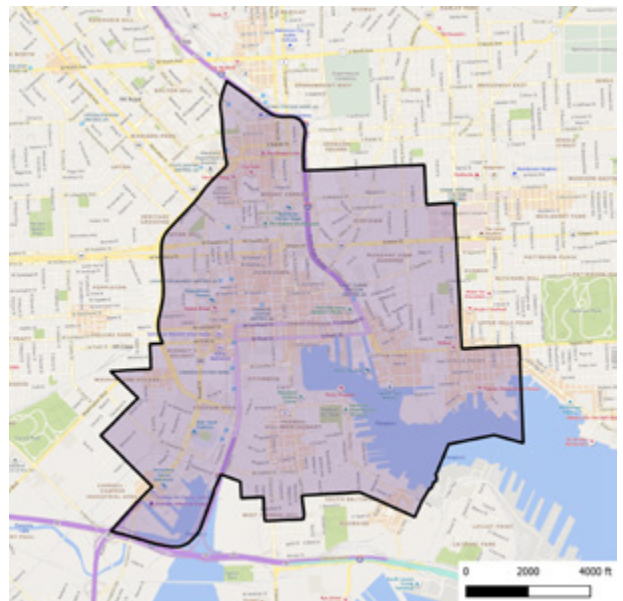
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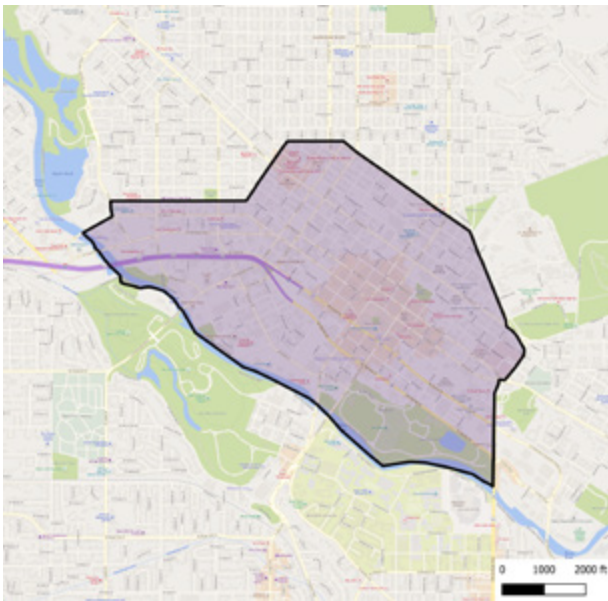
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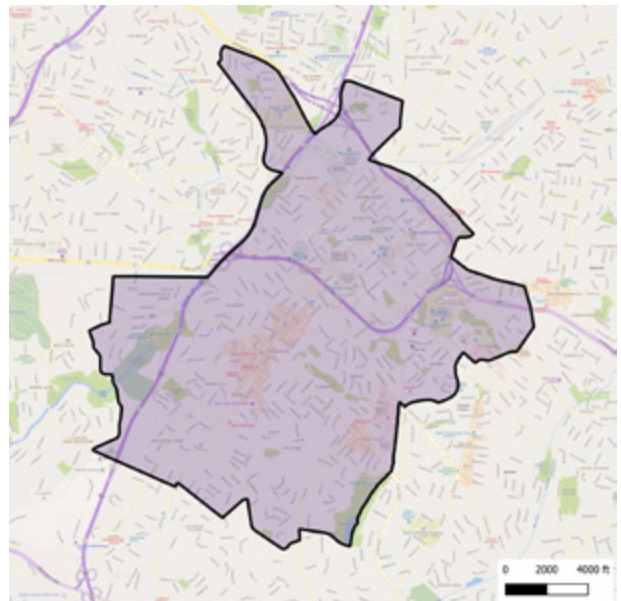
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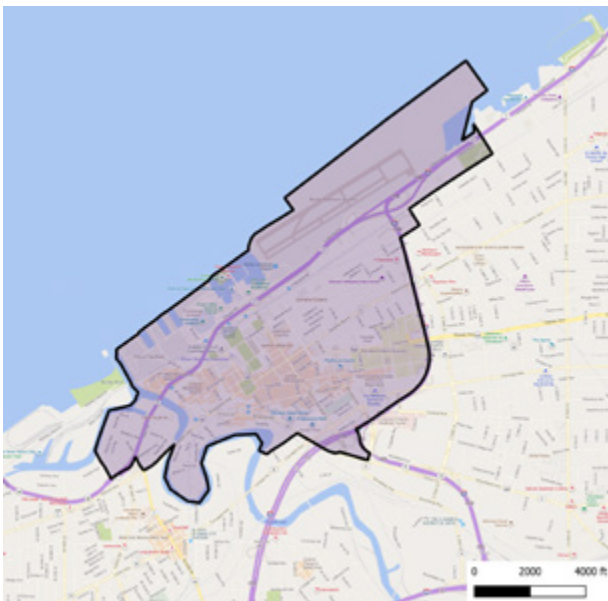
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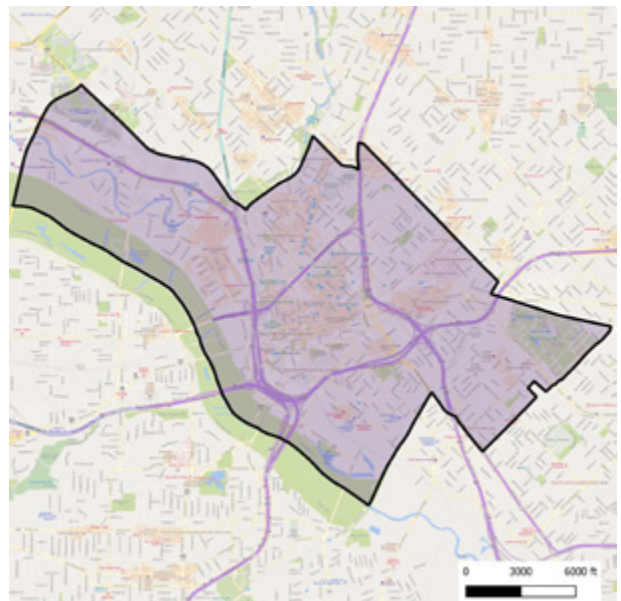
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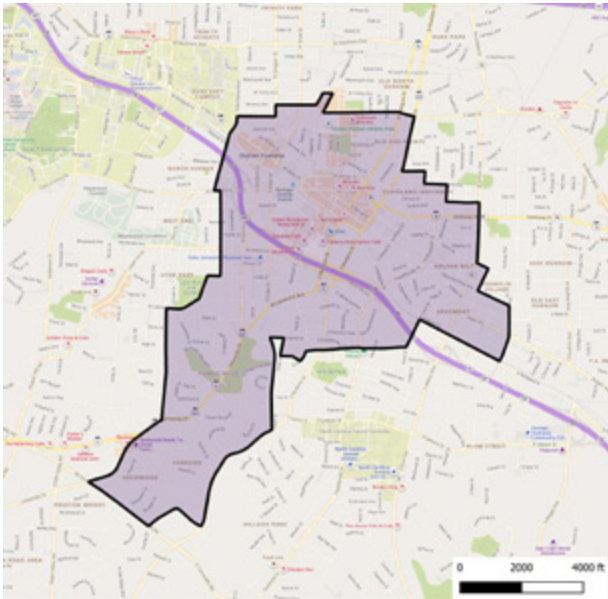
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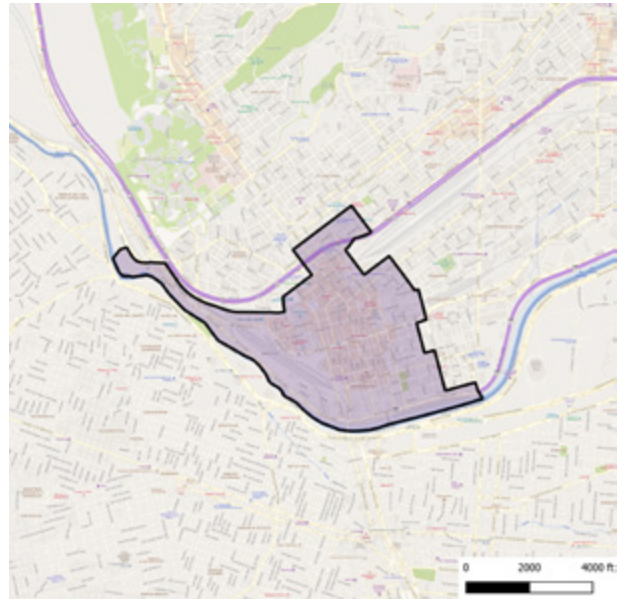
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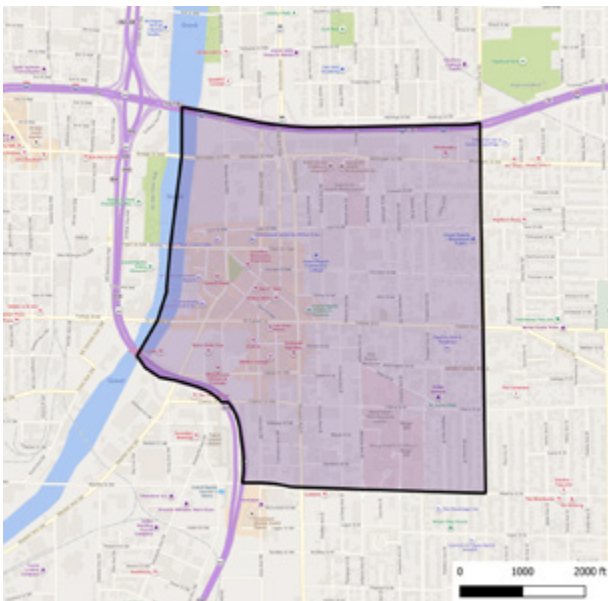
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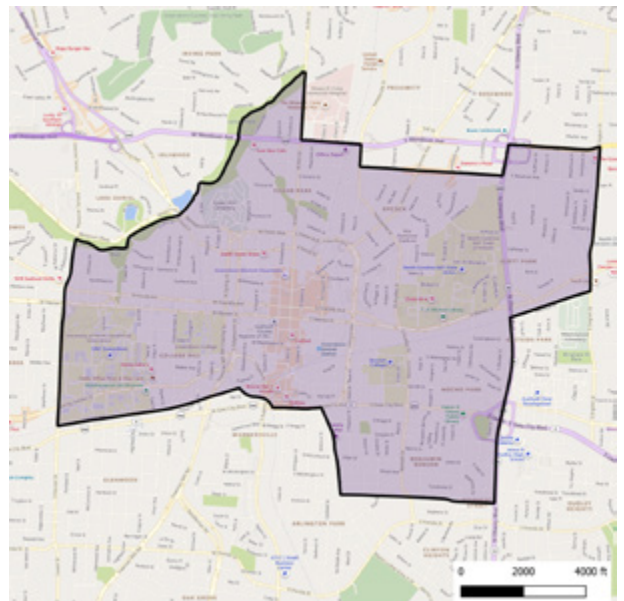
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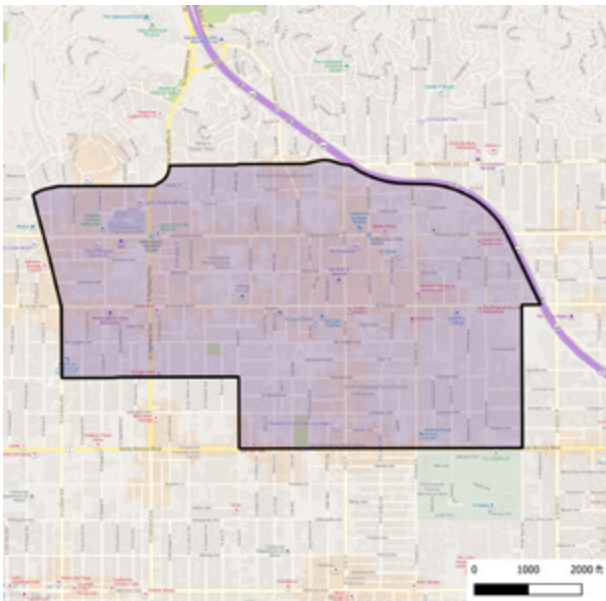
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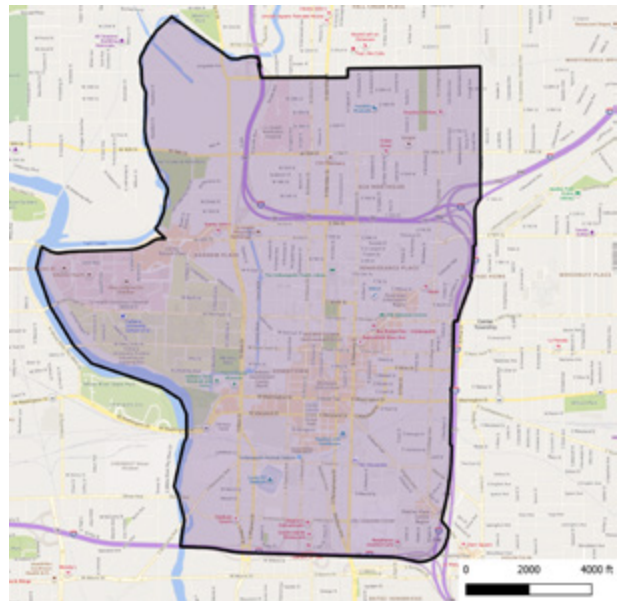
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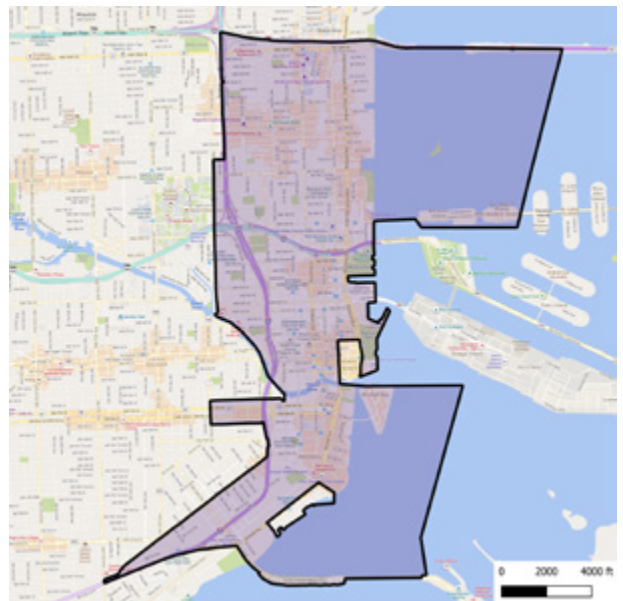
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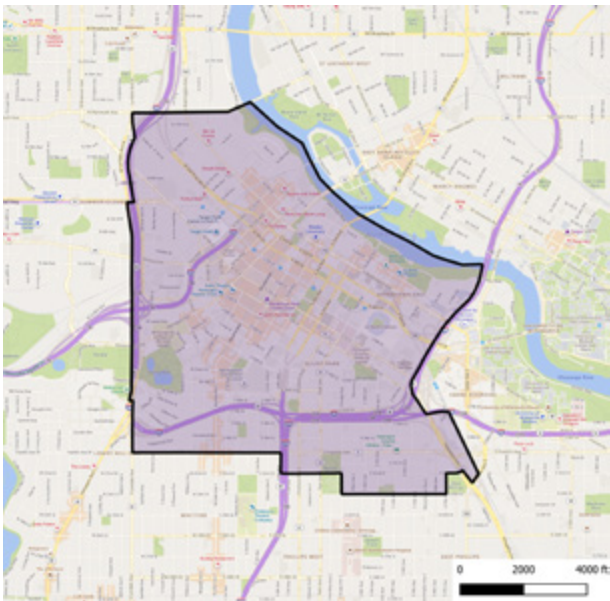
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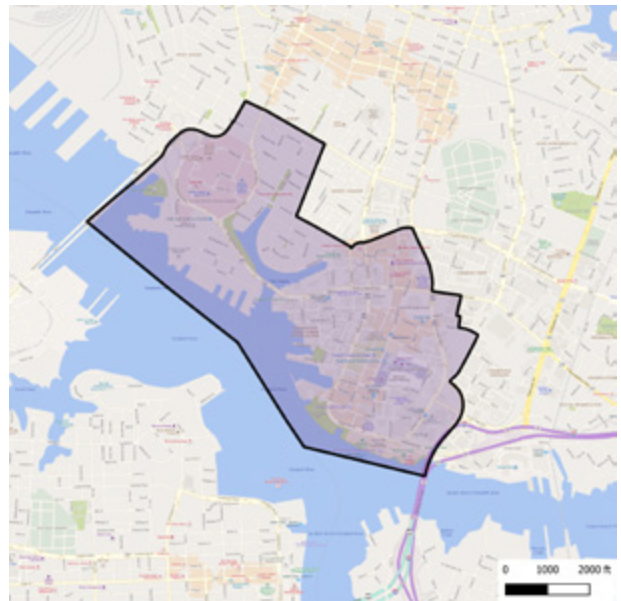
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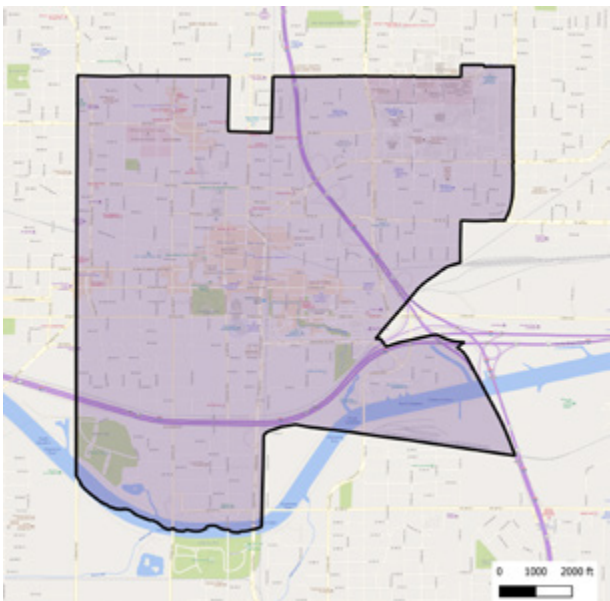
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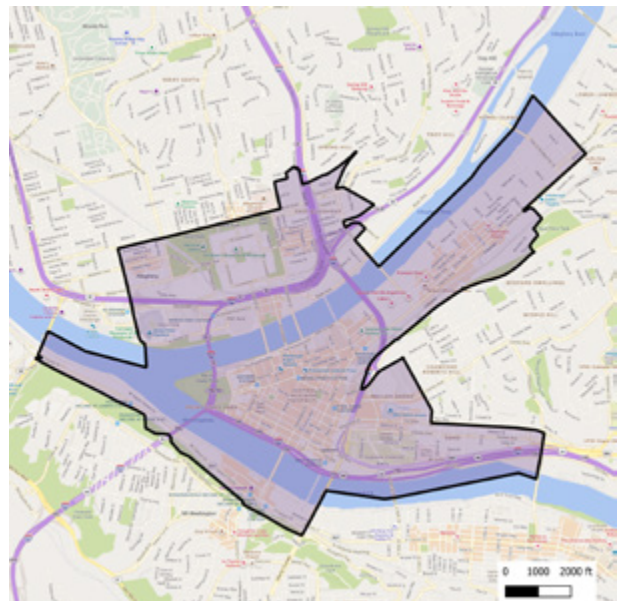
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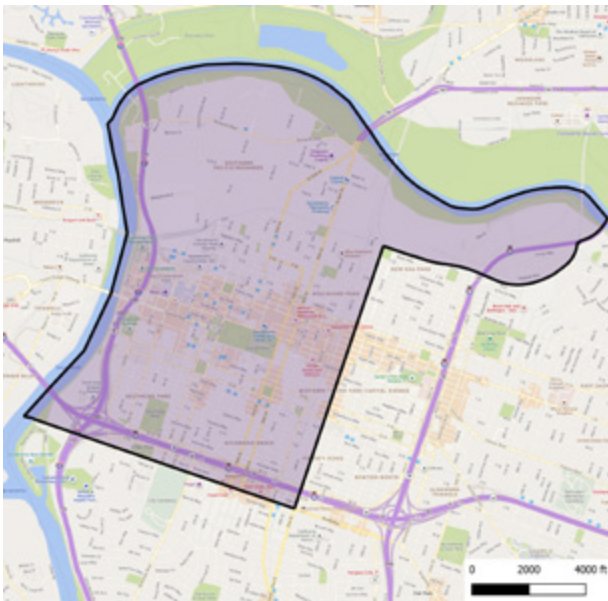
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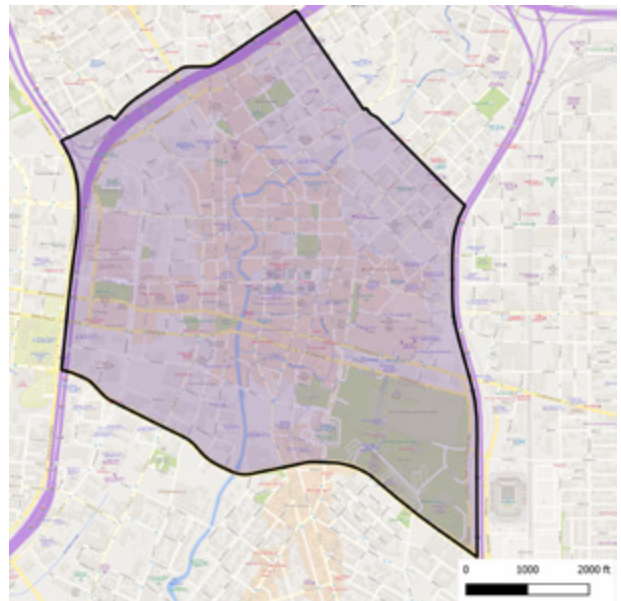
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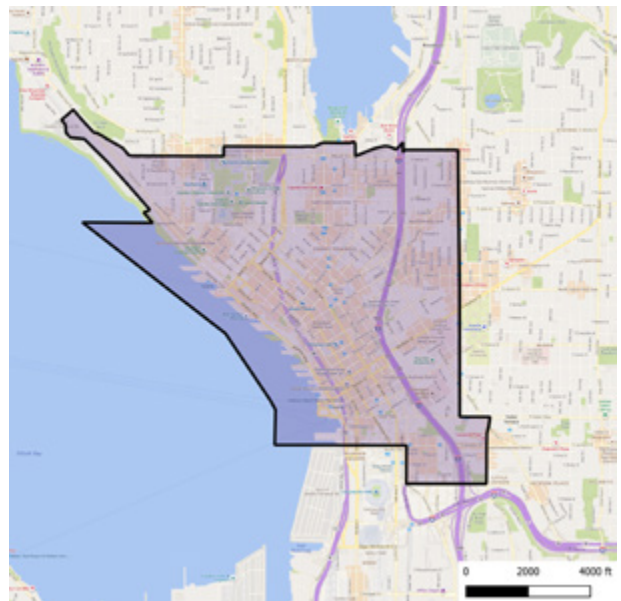
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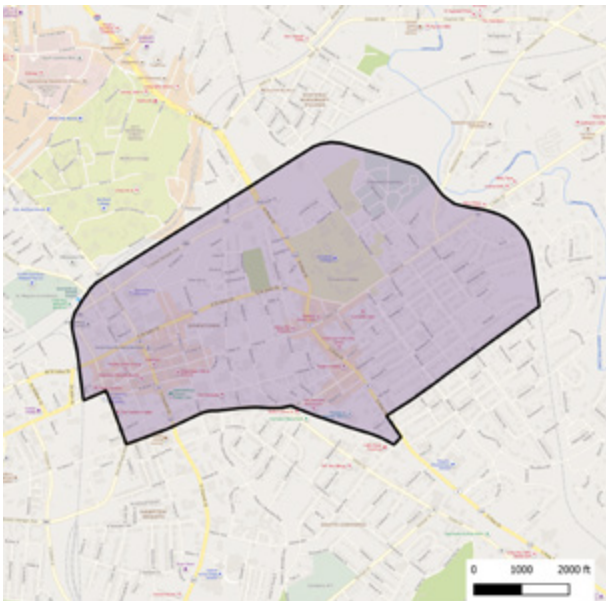
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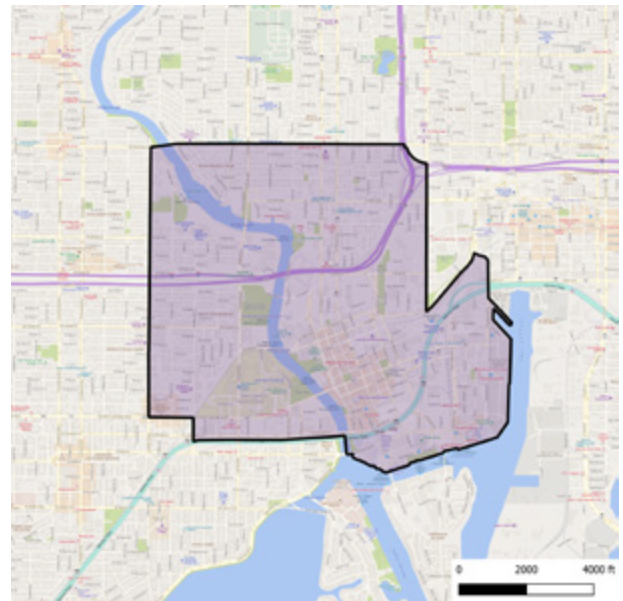
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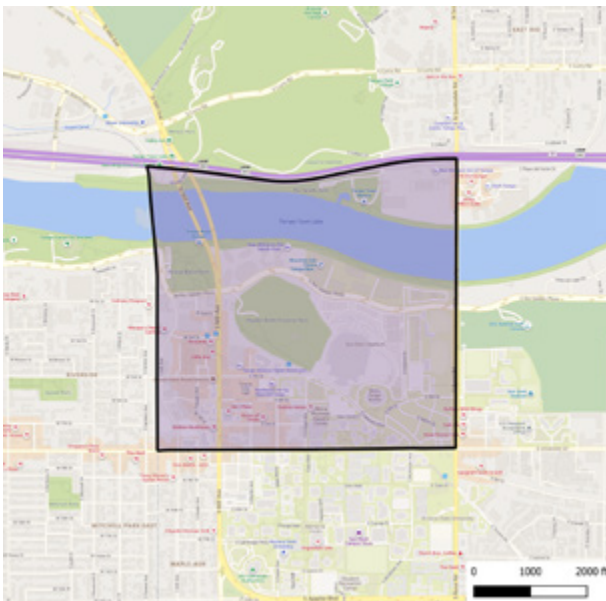
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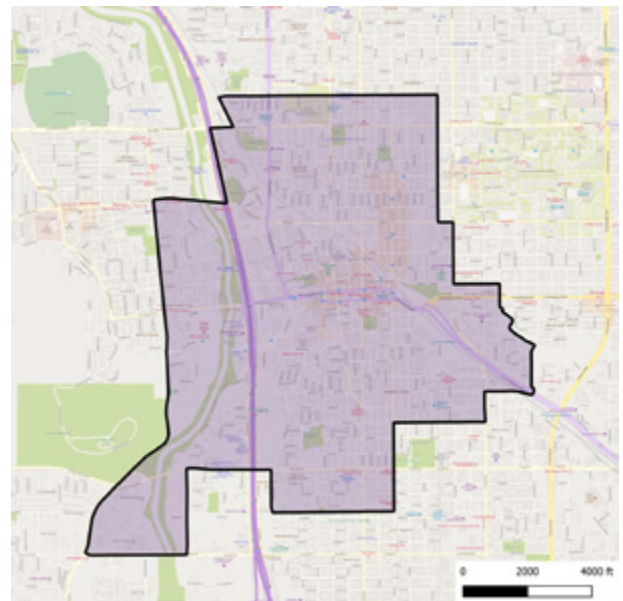
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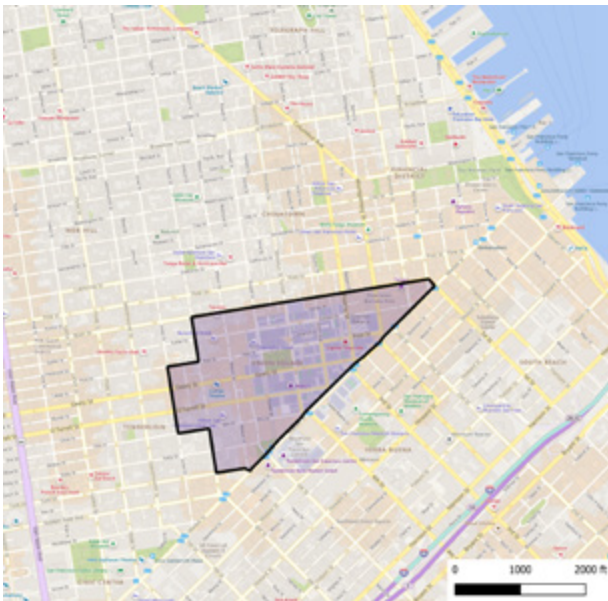
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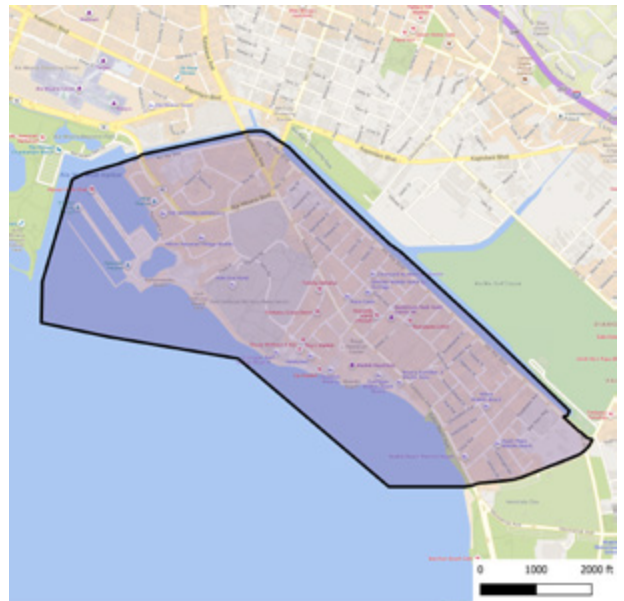
TUCSON, AZ



UNION SQUARE, SAN FRANCISCO, CA



WAIKIKI, HI



WICHITA, KS

