how our downtowns’

THREEE MOST IMPORTANT USER GROUPS CAN HELP THEIR SUSTAINED RECOVERIES

By N. David Milder

LARGE DOWNTOWNS

THERE IS AN EMERGING CONSENSUS THAT OUR LARGE DOWNTOWNS MUST BECOME MUCH MORE MULTIFUNCTIONAL BY GROWING THEIR CENTRAL SOCIAL FUNCTION ASSETS

The Covid crisis has blown away any credibility from the argument that our successful downtowns are synonymous with the notion of Central Business Districts dominated by large office clusters. The future well-being of our downtowns will depend on the development and growth of their Central Social Functions that emphasize social connection, joy and fulfillment rather than work and business transactions.[1] Urbanists such as Richard Florida, Ed Glaeser and Carlo Ratti have also argued that our successful downtowns of the future will be much more multifunctional and focus more on places to connect, play and live.[2]

As demonstrated in discussions among board members of The American Downtown Revitalization Review, even those who firmly want a full recovery of their office sector acknowledge that outcome is more probable if they also develop stronger Central Social Function (CSF) venues. Offices will have to be not only places to work, but destinations where workers want to be. Out-of-the-office offices where they can meet to work, socialize or simply to play will be very important downtown assets.

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MAKING IT HAPPEN

If making downtown CSFs much stronger is increasingly gaining traction as the goal to pursue, how that will be achieved remains uncertain. The most popular approach toward increasing downtown multifunctionality seems to be providing much more housing. It is driven by the needs for more affordable housing, to convert outmoded downtown office buildings into more viable uses, and to a lesser extent to simply increase downtown multifunctionality. Housing, however, is a solution path that requires quite a lot of time and very substantial resources to effectuate. It could take at least a decade or more to meaningfully implement and several years just to achieve a kick start effort. Moreover, the office conversions may have very little impact on the areas immediately surrounding them, while the largest and densest office clusters would require an economically unfeasible amount of housing to achieve a meaningful rebalance of office worker and residential populations.

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DOWNTOWN NON-RESIDENT WORKERS, RESIDENTS AND VISITORS

There is an emerging consensus that our large downtowns must become much more multifunctional by growing their central social function assets. Noted urbanists are now arguing that our successful downtowns of the future will be much more places to connect, play and live. The main challenge is how to make it happen. Surprisingly, because they seldom have large office clusters in them, our smaller downtowns are often more multifunctional and resilient than our large ones.

The economic recoveries of our downtowns will depend on their three most important user groups: workers, residents and visitors. The visitors will have the biggest impact in the near future. In our smaller cities, workers employed in a town, but not in the downtown often account for many downtown visits. Domestic tourism will be a key to downtown recoveries. Impactful residential growth is more likely in larger cities and will take time to develop.

This article aims to demonstrate that while each of our downtowns' three major user groups – workers, residents and other visitors – can contribute to their recoveries over the coming three to five years, it is the other visitors who are likely to have the largest positive impacts in the near term. Recent research by Philadelphia's Center City District indicates that they probably already account for most visits to our larger downtowns – the ones facing the strongest recovery challenges.[3]

The value of people living in a downtown has also been demonstrated by their ability during the worst days of the pandemic to maintain a basic steady flow of pedestrian traffic that can be sufficient to maintain an area's image of being safe and active. However, their numbers are seldom large enough to compensate for the lost visits of people employed in the downtown. Increasing their numbers will require many years and considerable resources to accomplish. Such an effort may be very worthwhile in some instances, but disappointing in others, and must be carefully planned.

People certainly will not stop working in our downtown offices, but they may visit on fewer days. In the past, major office tenants – both private and public – have done their best to keep their employees from leaving their buildings. However, the fact that under hybrid work models, downtown offices will be specializing as places to accommodate work that strongly involves social interactions suggests that there is a real chance that downtown office workers may visit downtown CSF venues as often or even more frequently than in pre-crisis times. However, that will require two conditions to emerge: 1) There are attractive "out-of-the-office offices" close by; and 2) Managers do not try again to keep their workers on site as much as possible.

ATTENDANCE AND FOOT TRAFFIC ARE KEY INDICATORS OF STRONGER CSFs

While jobs and monetary transactions are at the heart of downtown Central Business Functions, the facilitation of social interactions are at the core of CSFs. Consequently, the most fundamental statistics about CSFs are not about job numbers or dollars sales/expenditures, but how many people visit the downtown and its various CSF venues.

These simple statistics reflect the magnetism and strength of the CSF venues. Furthermore, some very strong CSF venues, such as parks and public spaces, may not be associated with many financial transactions. The visitors that CSF venues attract, however,

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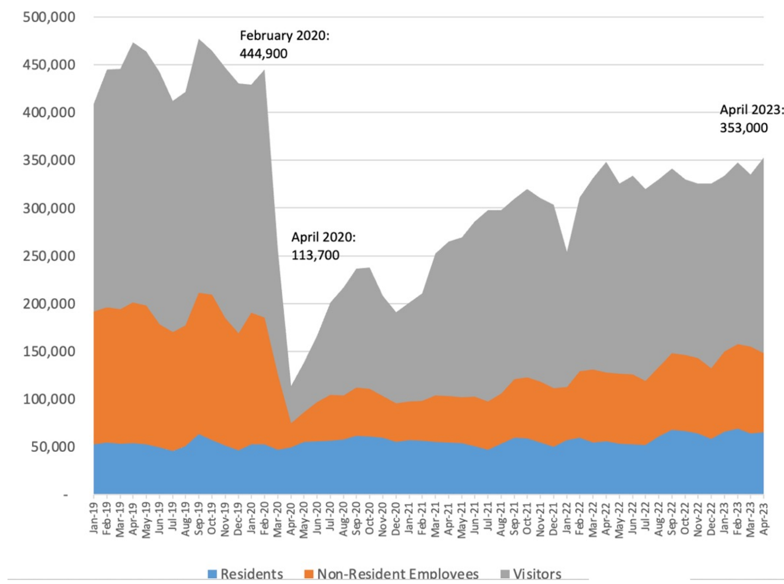
FIGURE 1. AVERAGE DAILY VISITS TO CORE CITY CENTER



Source: Placer.ai cellphone data used by the staff of City Center District to create this chart.

can help make a downtown seem safer, well activated and engaging. By doing so, they also make the downtown a more appealing location for retail and office tenants. They also may attract customers who nearby retailers can then also draw into their shops. In other words, retail will become more ancillary to strong CSF venues.

Perceptions of robust pedestrian traffic and safety do not require reaching pre-crisis or sardine can levels. Sufficient amounts will do, and in terms of absolute numbers, the levels achieved in suburban downtowns and city neighborhood commercial districts provide indications of what those levels might be.

Unfortunately, to date, some of our largest and strongest arts, entertainment and cultural institutions apparently feel it is in their best interests to keep publicizing how badly hurt they have been by the crisis – though it well may be that the media prefer stories with such a slant – when a more objective analysis might find that they are doing fairly well given the huge challenge the crisis posed for the nation and them. For example, some of the largest performing arts venues in NYC lament that only about 60% of their seating capacity is now being filled, when pre-crisis they were filling 75% of those seats. Their recovery of pre-crisis levels was really about 80% by the end of 2022. That was substantially higher than the rate at which Manhattan's workers were returning to their offices. Moreover, this was accomplished when the tourist market they were heavily reliant on had almost disappeared. One might reasonably argue that their recoveries were rather impressive, even if pre-crisis attendance levels were not achieved. With the formal end of the Covid emergency declared by the CDC and the end of associated regulations at all levels of government, expectations of additional audience regrowth are not unreasonable.

TABLE 1. SOME AVERAGE DAILY VISITS TO CORE CENTER CITY BY USER SEGMENT JAN 2019 – APRIL 2023 AND THE IMPACT OF COVID

Date	Residents		Non-Resident Employees		Visitors		Totals
	Number	Percent	Number	Percent	Number	Percent	
Jan-19	52,729	12.9%	139,043	34.0%	217,363	53.1%	409,134
Jun-19	49,225	11.1%	129,172	29.2%	263,782	59.7%	442,179
Dec-19	46,392	10.8%	122,353	28.4%	261,634	60.8%	430,378
Mar-20*	47,118	18.4%	78,975	30.8%	130,569	50.9%	256,661
April 20**	49,235	43.3%	25,838	22.7%	38,605	34.0%	113,678
Jun-20***	55,560	33.3%	41,164	24.7%	69,931	42.0%	166,655
Dec-20****	55,118	28.8%	40,319	21.1%	95,811	50.1%	191,247
Jun-21	50,707	17.8%	51,669	18.1%	183,105	64.1%	285,481
Dec-21	50,222	16.6%	61,070	20.1%	192,114	63.3%	303,407
Jun-22	52,377	15.7%	73,749	22.1%	207,874	62.2%	334,000
Dec-22	58,478	18.0%	73,994	22.7%	193,149	59.3%	325,622
Apr-23	65,281	18.5%	82,618	23.4%	205,114	58.1%	353,013

Source: Placer Core Center City Visits Data kindly provided by the CCD. Data are for 12 of 52 counts.

*The Trump Administration declares a nationwide emergency
**Lowest visitation measured
***The number of confirmed COVID-19 cases in the U.S. surpasses 2 million.
**** The first deliveries of the COVID-19 vaccines began.

WHO VISITS THE MOST?

Paul Levy and his staff at the Center City District (CCD) in Philadelphia have been using cellphone based data from Placer with very impressive effect for some time, and Figure 1 shows how many of the daily visits to their downtown core were accounted for by downtown Residents, Non-resident employees, and Visitors from January 2019 to April 2023.[4] There are several important take-aways from Figure 1:

- On a vast majority of the numerous occasions when visitation was measured, Visitors accounted for most of them, usually exceeding the combined total of the residents and non-resident employees.
- *While much has been made about the decline in downtown office worker visits in our large cities, in the CCD the decline of Visitor visits was far larger and precipitous. However, they also made a larger and quicker recovery! That is important because it indicates that the causes of their declining visitation were situational rather than structural, and consequently easier from which to recover.*
- While Residents accounted for the fewest visits, the variation in their number through thick and thin was far lower than was the case with the other two downtown user groups. They provided a much needed reliable flow of downtown visitors.

Table 1 shows how the appearance of Covid impacted the visits made by these three user groups. Between December 2019 and March 2020 when the Trump Administration declared a national emergency, downtown visitation by Residents *increased* from 46,392 to 47,118 – probably because more were working from home – but decreased among the Non-resident employees from 122,353 to 78,975, and among the Visitors from 261,634 to 130,569. By June 2021, a month after the delivery of Covid vaccines began, visitation by Residents was 50,707, by Non-resident employees was 51,669, and by Visitors was 183,105.

During the height of Covid's negative impacts, when overall visitation was at its lowest, Residents accounted for 43.3% of all visits. Pre-crisis they usually accounted for a far lower percentage in the 10% to 13% range.

By April of 2023:

- Residents averaged 65,281 daily visits, 124% of their Jan. 2019 visitation level
- Non-resident employees averaged 82,618 visits, 59% of their Jan. 2019 level
- Visitors averaged 205,114 visits, 94% of their Jan. 2019 level.

Overall, as can be seen in Table 2, residents averaged 19.2% of all daily visits, with a low of 10.8% and a high of 43.3%. Non-resident employees averaged 24.3%, with a low of 16.9% and a high of 34%. Visitors averaged 56.4% with a low of 34% and a high of 67.3%.

TABLE 2. SOME STATISTICS ON PLACER'S COUNTS OF DAILY VISITS TO CORE CENTER CITY PHILADELPHIA

	Residents	Non-Resident Employees	Visitors	Emps/Resident	Visitors/resident	Visitors/emp	Residents % of total	Emps % of total	Vistors % of total
Average	56,009	81,300	184,681	1.45	3.30	2.42	19.2%	24.3%	56.4%
Low	45,888	25,838	38,605	0.52	0.78	1.49	10.8%	16.9%	34.0%
Date of Low	Jul-19	Apr-20	Apr-20	May-20	Apr-20	Apr-20	Dec-19	Jul-21	Apr-20
High	69,353	152,195	272,294	2.76	5.64	3.99	43.3%	34.0%	67.3%
Date of Hi	Feb-23	Oct-19	Apr-19	May-19	Dec-19	Jul-21	Apr-20	Jan-19	Jul-21
Delta	23,465	126,357	233,689	2.24	4.86	1.94	32.5%	17.1%	33.4%
% Delta of hi	33.8%	83.0%	85.8%	81.0%	86.1%	56.6%	75.1%	50.3%	49.6%

Source: Placer Core Center City Visits Data kindly provided by the CCD. Data are for all 52 visit counts

One important reason for the growth in residential visits to a level higher than in pre-crisis times is that the CCD core area's housing stock had grown during the crisis, bringing in additional residents. *The steadiness of their visitation level through the crisis period was in sharp contrast to the behaviors of the Non-resident workers and Visitors, and verifies claims about the value of downtown residents. Having more downtown residents is definitely an objective to pursue. However, in the CCD there are on average 3.3 Visitors' visits and 1.45 visits by Non-resident employees for each residential visit* (and the employee visits were about 41% off of pre-crisis levels). That is probably the case in most other large downtowns.

Even in a downtown where the balance between jobs and residents is fairly good, there will be about three job holders for each resident, and the office buildings will generate about twice the number of pedestrian trips per 1,000 SF as a downtown residential building. *Significantly increasing the number of downtown residents obviously also will take years to accomplish, so their ability to drive a downtown recovery over the next two to three years is unlikely to be strong.*

The apparent national media and expert obsession with remote work has perhaps blinded us to what is actually happening in our large downtowns. *The down-*

town Philadelphia story shows that there the flight of office workers to remotely working at home was not the strongest cause of the huge decrease in downtown visitation that accompanied the spread of Covid. Between January 2019 and April 2020 downtown employee visits declined by 113,205, but the visitation by Visitors declined by 178,758 visits, a loss 58% larger than that of the employees. *Even more importantly, downtown employees were never the primary source of downtown visits, even if still an important one.*

Unfortunately, famed corporate leaders nationally seem to be very concerned about getting more workers back into their offices *and keeping them there*. Downtown leaders and other kinds of stakeholders may share the desire to see a higher Return To Office (RTO) rate, but such a return will do their downtowns little good if these workers stay cooped up in their offices all day. Look closely at several plans for making downtown offices more attractive to workers, more like destinations, and you may find designs aimed at again capturing as much time of these workers as possible within their buildings. That would mean, if this becomes a general pattern, that even a 100% RTO rate would have little positive spillover for other downtown businesses.

An important question is: are the CCD data a good indicator of what is happening in our other large downtowns? On the basis of the data presented in Table 3, I would argue that they very probably are. It shows Paul Levy's findings about visitation when he looked at the three daytime population segments – visitors, workers, and residents – in our nation's largest 26 core downtowns in 2019 Q2 and 2023 Q2. Using data from Placer.ai, he shows that in both 2019 and 2023 people in the Visitors category accounted for about 60% of the total daytime populations in these large core downtowns.

TABLE 3. COMPOSITION OF THE COMBINED POPULATION OF THE 26 LARGEST CORE DOWNTOWNS IN 2019 AND 2023

User Group	2019 Q2	2023 Q2
Visitors	60.6%	61.7%
Non Resident Workers	32.2%	27.1%
Residents	7.3%	11.2%

Source: Paul Levy, Center City District. "Downtowns Rebound: The Data Driven Path To Recovery." Oct 5, 2023. https://centercityphila.org/downtownsreport

Regarding the recovery of visitation, Levy's Center City District team also found that:

- "The cumulative average of visitors across the 26 downtowns by the end of Q2 2023 back at 79% of Q2 2019 levels; workers of all kinds back at 66%; and residents at 120%."
- While downtown residents are extraordinarily important to the vitality of city centers, in 2019 they represented only 11% to 13% of the total volume of people downtown in Portland, Philadelphia, Seattle and San Francisco, the four cities with the largest residential share. By contrast, visitors in the 26 cities comprised on average a two-thirds share."[5]

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WHAT NEEDS TO BE DONE

Each of these three major downtown user groups can significantly contribute to the recoveries of our large downtowns, if proper steps are taken to leverage them. Below are some suggestions about how to do that.

Visitors

- First and foremost, downtown leaders and stakeholders need to recognize the strategic importance of this group and then devise programs to encourage and facilitate growth in their visits.
- These visitors are not coming downtown to work, but they are coming to shop, play, meet people, and obtain personal and professional services. Drawing them to the downtown are venues that have the power of destinations, though other less magnetic venues may attract them while they are downtown. Building up the number of venues visited on the average downtown visit should be a goal of downtown leaders and stakeholders. These numbers will be low when pedestrian counts are very low, fear levels are sufficiently high, and attractive venues are few.
- The return of Visitor foot traffic in many of these large downtowns can appreciably self-heal the problems of fear and an image of marginal area activation. Placer data support the contention that these visitors – be they tourists, shoppers, diners or seekers of essential services – have led recovering levels of foot traffic. Their relatively large numbers can make returning to their offices seem safer and again attractive for many downtown workers.
- *The key to attracting more visits from Visitors and increasing the number of venues they go to on each trip is the number and magnetism of a downtown's destinations that are open.*
- Unfortunately, the amount of rent that a tenant is prepared to pay is not a good measure of the magnetism they add to the downtown. Nor are high rents an assurance that some significant market

potentials are not being ignored. For example, in Jamaica Center in Queens back in the 1980s local retailers were making so much money off their lower income and teenage shoppers that they cared little about the far more numerous, solid, middle income people living in their trade area.

- *More than ever before, downtown management organizations need to carefully assess the strengths of their current downtown destinations to determine which are no longer pulling their weight and need significant updating, and to identify significant growth potentials that now are being ignored.* A great example of the former was the recognition by the management of Rockefeller Center that its restaurants needed upgrading, and the steps they took to achieve that. Unfortunately, too often local downtown leadership is resistant to such ventures.
- Some signs that such an assessment may be needed are: 1) high commercial space vacancy rates that appeared before the crisis and continued since then; 2) relatively low visitation rates by residents living within a 5 to 20 minute walk shed; 3) relatively low visitation by young adults, say under 30, and 4) most exciting new destinations are not opening in the downtown, but elsewhere in the city.
- Struggling public transit systems, with lower levels of service, and higher fear of crime will diminish a downtown's ability to attract appreciably more Visitors' visits.

<u>Non-Resident Employees</u>

- Downtown leaders and stakeholders need to develop and accept an accurate understanding of what is happening in their office market. That may entail the acceptance of the fact that *office work will not be entirely or even drastically disappearing from our downtowns*, though workers may be showing up in their offices for fewer hours per week. Moreover, the shrinking values of many office buildings may also reflect the bursting of a fairly long-standing bubble of exuberant valuations, and that may prove to be a good thing in the long term for economic growth in the downtown.
- However, that understanding should also contain the realization that the nation's recent experience with remote work was so deep and pervasive that it will never really go away, and most workers will continue to do some remote work even if they

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For example, instead of creating an on-site cafeteria, a corporate tenant or building owner could arrange with nearby restaurants for discounted special meals, and public libraries and public spaces have proved to be viable places for business meetings. Meetings for after-hours drinks in bars also often have strong business content, as do mid-day breaks at an outside coffee shop.

return to their office five days a week. Moreover, workers have become proficient at it and equipment and programs to support it continue to improve. *A reasonable expectation is that the use of remote work will vary over time and with national and regional economic or health conditions, and the nature of the work being done, and the character of the organization for which it's being done.* For example, another national recession or viral outbreak might spark another immediate surge in remote work.

- THE ACHIEVEMENT OF A 100% RTO ACROSS ITS ENTIRE OFFICE SECTOR DOES NOT MEAN THAT A DOWNTOWN'S ECONOMIC HEALTH WILL BE RESTORED! It could mean that workers return to enhanced workspaces, and office buildings are again financially viable, *but these workers would have marginal impact on the rest of the downtown if they left their buildings far less frequently than before the explosion of remote work.*
- DOWNTOWNS MUST DEVELOP STRONG OUT-OF-THE-OFFICE OFFICE VENUES THAT CAN FACILITATE WORKER NEEDS FOR SOCIAL INTERACTION AND CONNECTION WITH FELLOW WORKERS.
- VERY IMPORTANTLY, CORPORATE TENANTS AND BUILDING OWNERS MUST SUPPORT SUCH ENDEAVORS. This probably will not happen without a strong educational effort on its behalf. Given how they are structured and the composition of their governing boards, downtown management organizations may not be well positioned to conduct such an educational effort. A national organization such as ULI might be better situated to do it.
- For example, instead of creating an on-site cafeteria, a corporate tenant or building owner could arrange with nearby restaurants for discounted special meals, and public libraries and public spaces have proved to be viable places for business meetings. Meetings for after-hours drinks in bars also often have strong business content, as do mid-day breaks at an outside coffee shop.
- Unless this is done, high RTO rates are likely to just create new and admittedly improved monofunctional office clusters that really do little for the rest of their downtowns.

- However, if it is done, then there is a very decent chance that office workers will increase their downtown pedestrian trips and spending in local shops. In turn, that might help offset losses in trips and spending due to remote work.
- Also, the development of an ample number of out-of-the-office offices will probably reduce the need to rehab old office buildings or to build new office buildings to have such facilities. This, of course, can be a problem for places dependent on new capital investment to generate additional property tax revenue.

Downtown Residents

- An essential first step here is for downtown leaders and stakeholders to realize that this is a far more complex, multi-dimensional problem than many now assume. At issue are not just the outmoded office buildings that need to find a new viable use, but also the questions of how new housing can help create a better functional balance with strong office clusters, and where such housing should be located and with how many units to achieve desired impacts on the surrounding areas. New housing and the conversions of non-office buildings to a residential use also are very likely to be in play.

At issue are not just the outmoded office buildings that need to find a new viable use, but also the questions of how new housing can help create a better functional balance with strong office clusters, and where such housing should be located and with how many units to achieve desired impacts on the surrounding areas. New housing and the conversions of non-office buildings to a residential use also are very likely to be in play.

- Moreover, in some downtowns, the office cluster is so dominant that using housing to create a meaningful rebalancing of office and residential functions is not possible, though new housing can still have benefits at the level of a block or intersection in such districts.
- Downtown housing development will take time. Even the much discussed conversions of office buildings in many downtowns must await the often time consuming formulation and approval of new regulations and incentive programs before construction can begin.
- Who will reside in the new housing will likely be an emerging issue. The need for affordable housing by the homeless and lower income households to be provided by the conversions of old office buildings is already on the table in NYC and elsewhere. However, the need for affordable housing has also crept well up the ladder of household incomes, so those with annual incomes over $100,000 share this concern. That said, creating new downtown housing will be very expensive and, given the likely limits on subsidies for non-market rate units, most units will probably be occupied by very financially comfortable households. Importantly, there is a proven very strong demand among such households for new downtown units.
- Where the housing is located will determine its ability to positively impact the downtown. It will most likely positively impact the area within a 5-minute walk of its location. It can impact the area within a 5 to 20-minute walk shed if that area contains strong destinations that match with the needs, wants and behaviors of the new residents.
- In some parts of a downtown the imbalance between its office and residential functions can be so strong that new housing is unlikely to correct it. For example, while the number of jobs per resident in Midtown Manhattan is about 5.2, that ratio for a .25 mile ring around 30 Rockefeller Plaza is a staggering 101.3.[6] However, there are about 190,000 residents who live within a 10 to 20 minute walk. In such circumstances, increasing residential traffic will probably be more quickly and effectively accomplished if the destinations in Rockefeller Center are appropriately upgraded than by the provision of more nearby housing.
- In other words, many downtowns may be suffering from a lack of residential traffic simply because they are not effectively tapping their close-in, though somewhat distant, residential markets!
- How the new housing is "packaged" will have a strong influence on its ability to positively impact the downtown.
- Housing provided in large monofunctional, multi-building projects will be difficult to create because of the lack of appropriate sites, high costs, and development complexity. Sites that are available are likely to be on a downtown's periphery, which will impede their ability to positively impact the large office clusters close to the downtown core.
- Housing provided in large multifunctional, multi-building projects will also be difficult to create because of the lack of appropriate sites, high costs and development complexity. Again, the sites that are available are likely to be on a downtown's periphery, which will impede its housing's ability to positively impact the large office clusters close to the downtown core. *On the other hand, such large multifunctional projects may provide the newest and most attractive office and retail spaces that can strongly compete with the downtown core's older office and retail spaces.*
- The conversion of outmoded office buildings to housing may help those structures and their ownerships survive, but they are unlikely to individually add sufficient units to add appreciably to the foot

traffic, retail sales, and restaurant revenues in their nearby areas unless they constitute a sizable cluster of such buildings.

- The most productive way to provide housing that will have meaningful positive impacts on the immediately surrounding area is through the construction of a number of large multifunctional buildings that are geographically separated from each other. Such buildings can have 100,000+ SF of space for each of three or more functions such as housing, offices, retail, services, entertainment and hotels. It will be easier to find sites for them in or close to the downtown core, than it is for the multi-building projects, and their multifunctionality may make it easier for them to find financing and to obtain municipal approvals. Their size means they can bring significant increases in foot traffic and spending potentials to the nearby area, while their multifunctionality helps assure the steadiness and reliability of these impacts.

LOOKING TOWARD THE FUTURE OF OUR LARGE DOWNTOWNS

While much has understandably been made about the negative impacts of remote work on the demand for downtown office space and the values of office buildings, far too little attention has been paid to the wide array of downtown visitors who are attracted for many reasons other than work and making business transactions. They, in fact, account for most visits and consequently of a downtown's image of on-street energy, safety and activation. In turn, that image is an essential part of a downtown's magnetism for visitors, residents, office and retail tenants.

Office spaces and the firms and workers who occupy them will continue to be important components of strong downtowns, if somewhat diminished in size and valuations, but future downtown growth strategies must also look at the roles and impacts of more downtown residents and visitors. Regarding the visitors, this might entail a hard-nosed assessment of the ability of the downtown's destinations to attract them.

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The potential benefits of downtown housing are undeniable, but adding a lot of new units will take much time and resources, and unless carefully planned, they may not have the desired impacts. It is possible that by the time the new housing finally hits the market, other parts of the area have fundamentally changed. In some downtowns the imbalance between residents and job holders is too large to be corrected by building new units, and a more effective strategy may be to assure that current residents living within a 5 to 20 minute walk shed are being adequately attracted.

THESE DOWNTOWN USER SEGMENTS IN SMALLER CITIES

THE SITUATION IN SMALLER CITIES IS QUITE DIFFERENT, BUT VISITORS ARE ALSO THE CRITICAL USER SEGMENT

The focus above has been on three downtown user segments in our larger downtowns. They also are the downtowns that are drawing heaps of attention around the question of whether or not they can survive substantial reductions in the demand for their office spaces and the valuations of the buildings they are located in. Covid-19 sparked this problem and remote work was the vehicle through which its influence was felt. Many are seen as being in a "doom loop."[7] While the downtowns in our smaller, if still sizeable cities broadly in the 25,000 to 75,000 population range have also felt the sting of the Covid-19 induced crisis, it is not playing out in the same manner as in our larger cities, but the importance of Visitor visits probably will also be critically important for their recoveries.

As the analysis below will demonstrate, smaller downtowns are far less likely to have large office clusters that have been rocked by remote work, and, with some notable exceptions, they have not been able to attract large numbers of downtown residents, or to establish a culture in which residences in multiunit downtown buildings are seen as desirable by those who can afford market rate prices. However, they are attracting downtown Visitors, and some at an even higher rate than before Covid.

DOWNTOWN HOUSING

In an article published in the Economic Development Journal in 2020, Bill Ryan and I looked at downtowns in all 259 cities with populations of 25,000 to 75,000 in seven Midwestern states, and found those in the suburbs had some residential growth, about 5% between 2010 and 2018, while the "independents, the financial and commercial centers at the cores of smaller rural metro areas had practically no growth, just 0.5%.[8] These rates were far lower than those found in our successful larger cities. More troubling still was our finding that 31% of the suburban cities were dealing with declines in their downtown populations, while 46% of the independents experienced such decline. This strongly suggests that the strategy of using more housing to drive more downtown multifunctionality via a rebalancing between jobs and residential functions will have a hard time gaining traction in cities such as these. *Indeed, it may not even be needed to rebalance downtown functions since they seldom, if ever, have the huge office clusters found in our large downtowns.* Of course, more downtown housing would benefit them by building up their captive close-in sources of foot and shopper traffic.

In these cities, a key factor is the residents' preference for rural and suburban lifestyles. Getting around without a car in these cities, where public transit assets are very likely to be weak or non-existent, and strong preferences for single family homes on substantial lots means that the demand for downtown housing in multi-unit buildings will be limited to a few niche market segments such as young adults forming new households, some empty nesters, and those in low income households. That said, the suburban city downtowns did show a greater amount of variation in their growth rates, ranging from a decline of -57% to an increase of 140%, so some of them were experiencing significant growth.

Residents who also work in the downtown, the live-workers, offer greater benefits to their districts than residents who work elsewhere. Our study found that the independent city downtowns had more live-workers than did the suburban downtowns, and their percentage of live-workers was about equal to that of most of our largest employment clusters in the nation.

Elsewhere in the nation, especially where strong rail transit is available for commuters, and where suburban downtowns have become far more urban in nature with strong restaurants, bars, public spaces and entertainment venues, strong downtown housing development has occurred. Morristown, NJ, which has added well over 1,500 new units since 2000 is a good example of this.

Of course, the strength of the regional economy in which a downtown is located is another important factor. The suburbs probably are more likely to be located in larger and stronger regional economies than the independent cities. Yet, even among the independents there can be some exceptions. Ithaca, NY, for example, leveraging its scenic tourist assets along with those provided by the presence of Cornell University and Ithaca College, has added over 1,000 new residential units to its downtown over the past decade. Other smaller cities have benefited from having attracted large numbers of residential tourists, those who own or rent second or third homes in them, e.g., Aspen, CO and Jackson, WY.

Residents who also work in the downtown, the live-workers, offer greater benefits to their districts than residents who work elsewhere. Our study found that the independent city downtowns had more live-workers than did the suburban downtowns, and their percentage of live-workers was about equal to that of most of our largest employment clusters in the nation. That might be a by-product of the very geographic isolation of these independent cities – they are the only significant employment center within a considerable amount of travel time. For example, in Laramie, WY, 68.9% of those living in Laramie also work there and the average commute time is just 12 minutes! In contrast, suburban cities have long served as the bedroom communities for employment centers within their regions.

We also argued that: "Economic developers should realize that the pivotal geographic areas for both the independent and suburban downtowns may be those in their Greater Downtowns, i.e., those within an easy five minute drive of the downtown core, but not within the district's official boundaries. The residents, workforces, and businesses in these areas are likely to be among the districts' most frequent visitors and biggest spending customers, and can have huge impacts on their images." The people living in such greater downtown areas will be very car-oriented – though micro-mobility vehicles, such as e-scooters and e-bikes, may win some over – and occupy single family homes on substantial lots.

The pandemic has sparked significant numbers of remote workers to move from our large and expensive cities like NYC and San Francisco to somewhat smaller if still major metros such as Austin, Denver, and Dallas where housing is more affordable and commuting to work costs less in terms of time and money. Some remotes are also going to "smaller, scenic vacation spots" such as Ocean City, NJ; Cape Cod, MA.; and the area around Salisbury, MD.[9] However, while the absolute numbers of these down-sizing remotes are large enough to deserve notice, there is still a lack of clarity about their impacts on their new communities. Earlier in the crisis there were many reports about them substantially raising housing costs in some suburban communities and in smaller cities in scenic locations, especially those that are gateways to prestigious national parks, but such reports have become less frequent with time.

NON RESIDENT EMPLOYEES

First of all, these smaller downtowns have been disrupted far less than their larger cousins by remote work because of a lower adoption rate that is probably based on their shorter commuting times and more affordable housing costs. They also are not usually strong in the sectors where remote work gained its strongest traction: technology and information, finance and insurance, and professional and business services.[10]

A major characteristic of our large downtowns is their very large and dense clusters of office buildings and the large number of employees who work in them. For example, within just a five minute walk of 30 Rockefeller Plaza in Midtown Manhattan are an estimated

184,894 jobs. In all of Midtown there are about 840,000 jobs.[11] Our smaller cities, and their downtowns, will certainly be employment centers, but they never attain the size and density seen in their larger cousins. For example, within five minute walks of the centers of Downtown Morristown, NJ, and Downtown Rutland, VT, there are only about 5,509 and 1,417 workers respectively in office prone industries, and Morristown ranks very high among smaller cities with significant office clusters.

Table 4 looks at three of the suburban smaller cities and three of the independent cities Bill Ryan and I reported on in 2020. The three suburban cities have substantial numbers of people employed in them, ranging from 27,813 to 42,249 jobs. Starting out as bedroom communities has not stopped the cities from also becoming office employment centers. Among the independent cities, La Crosse, WI has more jobs than the other five cities in the table, 48,264, while Rutland, 12,956, and Laramie, WY, 14,346, have the fewest. With the exception of Laramie, where university students boost the population total, the number of jobs either exceeds or comes fairly close to the number of residents in these cities. The highest jobs per resident ratio is 1.60 for Garden City, Long Island, though in four of the other cities it is less than one. Such ratios in a large downtown would be considered an indicator of a very desirable functional balance between jobs and residents.

What is most important is the distribution of those jobs between the downtown and the rest of the city, and how many of them are office prone. About 38% of the city's jobs are located within a 0.5-mile ring of the center of downtown Morristown, while 84% are within a 1-mile ring. The numbers for 0.5 mile rings in the other five cities range from 7% in Dublin, OH, to 23% in Garden City. Clearly, the core areas of these downtowns do not capture the vast majority of the jobs in their cities. These smaller downtowns do not play the strong roles of major employment centers that our large downtowns do.

The distribution of office prone jobs – i.e., the occupations most likely to use office spaces – in Morristown is probably indicative of the pattern to be found in other suburbs that have attracted significant amounts of office development. As can be seen in Table 5, about 82% of the jobs located in the city are office-prone. The percentage of the jobs located in the downtown that are office prone is somewhat lower than that in the rest of the city, reflecting its jobs in the retail and hospitality sectors. About two-thirds of the city's office prone employment is located beyond the downtown's 0.5-mile ring, and just 5,509 work within its 0.25-mile ring.

Rutland, while a regional commercial center, is more of a blue-collar town. Only about 57% of its jobs are office prone – see Table 6 – and this pattern is probably indicative of what is happening in most other Independent rural cities. Only 19% of the city's office prone jobs are located within the downtown's 0.25 mile ring, while about 46% of such jobs are located more than a mile away. Office workers have probably had less impact on downtown Rutland than they had on downtown Morristown prior to Covid since their numbers were fewer and their geographic dispersion was greater. That also suggests that any ill effects remote work had on these workers were probably felt less in downtown Rutland than in downtown Morristown. That said, both were certainly far lower, even on a relative basis, than the impacts remote work had on office workers in Manhattan or San Francisco.

TABLE 4. THE STRENGTH OF THE DOWNTOWN AS A JOB HUB IN THREE SUBURBAN AND THREE INDEPENDENT CITIES

	Suburbs			Independent Cities		
	Morristown	Garden City	Dublin	Rutland	La Crosse	Laramie
Population 2017	18,821	22,554	47,807	15,402	51,769	32,523
Total Jobs City 2017	27,813	36,176	42,249	12,956	48,264	14,346
Jobs Per Resident	1.48	1.60	0.88	0.84	0.93	0.44
	0.5 Mile Ring			0.5 Mile Ring		
Number of Jobs	10,504	8,218	2,778	1,940	9,837	2,578
% of City Total	38%	23%	7%	15%	20%	18%
	1- Mile Ring			1- Mile Ring		
Number of Jobs	23,431	31,309	16,539	4,980	15,973	3,512
% of City Total	84%	87%	39%	38%	33%	24%
	Beyond 1- Mile Ring			Beyond 1- Mile Ring		
Number of Jobs	4,382	4,867	25,710	7,976	32,291	10,834
% of City Total	16%	13%	61%	62%	67%	76%
Source: OnTheMap						

Non-resident employees in these smaller downtowns are more likely to return to pre-crisis patterns of working in and visiting their downtowns than those in our largest downtowns. Still, it should be remembered that: 1) Some downtown retail experts argue that the spending of downtown office workers is usually seriously over-estimated;[12] 2) These smaller city downtowns will never have anything close to the density of office development in larger downtowns. Their recovery of office worker visits is likely to be a contribution to the district's overall recovery, but unlikely to be its strongest driver.

TABLE 5. MORRISTOWN, NJ: OFFICE PRONE JOBS IN 2017

Geography	Count	% of City Total Office Prone	Office Prone % of All Jobs In Geo	Eds, Meds & PA % of Office Prone Jobs
.25 mile Ring	5,509	23.9%	69.8%	26.3%
.5 Mile Ring	7,930	34.4%	70.0%	34.2%
1 Mile Ring	21,788	94.6%	81.7%	64.0%
City Total	23,029	100.0%	82.8%	64.6%
Source: OnTheMap				

TABLE 6. RUTLAND, VT: OFFICE PRONE JOBS IN 2017

Geography	Count	% of City Total Office Prone	Office Prone % of All Jobs In Geo	Eds, Meds & PA % of Office Prone Jobs
.25 mile Ring	1,417	19.0%	57.3%	37.0%
.5 Mile Ring	2,456	33.0%	58.4%	36.5%
1 Mile Ring	4,042	54.3%	49.5%	32.2%
City Total	7,450	100.0%	57.5%	42.7%
Source: OnTheMap				

THE VISITS OF "VISITORS"

People coming downtown to shop, be entertained and obtain needed services and tourists are major components of Placer's Visitors category. What often goes unnoticed is the strength and importance of the visits by non-downtown employees that can easily equal or surpass those of a downtown's non-resident employees. Though their workplaces are more distant, they are still within easy travel times, and there are more of them than downtown workers. DANTH, Inc's consulting projects in towns and cities in this size range have consistently found that people working within about a 5-minute drive of the downtown are a key market segment relied upon by downtown eateries and services. These employees come downtown not because they have to work there, but to dine, shop, or obtain needed services. They are often coming to visit venues associated with the downtown's central social functions.

Having noted the importance of the visits of these non-downtown workers is not to imply that they will be the strongest source of downtown visits, though they certainly are likely to be an important one.

Unfortunately, it is not easy to find free Placer data for downtowns in these smaller communities, but city wide data are available for most, as well as for a few of their BIDs. As a result, the analytical strategy here is to see how what is happening overall in the BIDs matches with what is happening in the towns and cities. The reliability of the BID findings is probably greater if they are consistent with those for the towns and cities. That would indicate what is happening in the BIDs is part of a broader trend.

Table 7 displays Placer's foot traffic recovery data for 21 towns and cities with populations ranging between 12,502 and 75,021, as well as for the downtown BIDs in Carlisle, PA; Ithaca, NY; Corning, NY; Evanston, IL; and Chapel Hill, NC.

Several of these towns had downtowns with reputations for having strong retail shops. For example, those in Wellesley, MA and Westfield, NJ for decades were like lifestyle malls, filled with very desirable national retail chains, coffeeshops and restaurants. Others like Northampton, MA, and Corning, NY, were known for their strong arrays of attractive independent merchants. However, in some others, the retail has long been either weak or challenged.

Generally, as the process of creative destruction unwound through the whole retail industry over the past decade, locations in these smaller suburban and rural cities were deemed less attractive by national chains. The chains' closures in many malls, however, by relinquishing substantial amounts of market share, has provided new growth opportunities for local independent merchants. Most of the smaller towns and cities have more than one commercial district, and their retail recovery rates can vary among them.[13] Consequently, while these towns and cities may be smaller, the status of their retail sector still can be complex.

Thirteen of the 21 towns/cities I selected have colleges or universities in them. Smaller independent rural cities are thought to be more successful if they have a significant college/university present. Seven of the "college towns" in the table fall into that category, while six are suburbs.

TABLE 7. FOOT TRAFFIC RECOVERY MAY 2023 COMPARED TO MAY 2019 IN 21 TOWNS/CITIES WITH POPULATIONS FROM 12,502 TO 75,021 AND FIVE BIDs

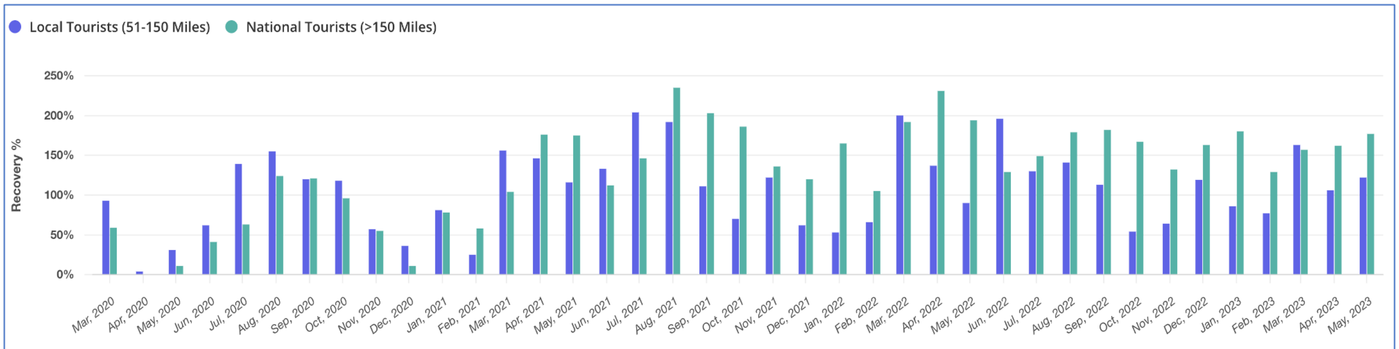
Town City	State	College/ Univ	Population	Retail Chain Recovery	Domestic Tourism	Dining
Wooster	OH	Yes	26,751	91%	131%	90%
Wilmington	OH	Yes	12,502	85%	131%	78%
Oxford	OH	Yes	22,625	78%	114%	86%
Delaware	OH	Yes	42,814	103%	167%	96%
Ithaca	NY	Yes	31,710	67%	121%	85%
DIA Ithaca	NY			116%	168%	
Auburn	NY		26,664	84%	124%	100%
Canandaigua	NY		10,526	96%	186%	123%
Corning	NY		10,738	69%	98%	98%
Gaffer District				67%	92%	80%
Wellesley	MA	Yes	26,664	88%	278%	109%
Northampton	MA	Yes	29,311	108%	119%	97%
Davidson	NC	Yes	15,132	66%	92%	63%
Chapel Hill	NC	Yes	61,128	79%	99%	89%
CH DTN Ptshp				105%	166%	131%
Charlottesville	VA	Yes	45,672	81%	104%	98%
Prescott	AZ		48,946	81%	116%	96%
Seal Beach	CA		25,242	82%	116%	75%
Scottsbluff	NE		14,282	94%	132%	86%
Oak Park	IL		53,224	91%	124%	97%
Evanston	IL	Yes	75,021	97%	123%	96%
DTN Evanston				70%	86%	90%
Prescott	AZ		48,946	91%	116%	96%
Westfield	NJ		30,754	83%	279%	120%
Carlisle	PA	Yes	20,144	87%	114%	87%
DTN Carlisle		Yes		95%	103%	
Averages 21 Cities/Twns			33,900	87%	135%	96%
Averages 12 College Towns			34,123	86%	133%	90%
Averages 6 Rural College Towns			23,841	86%	122%	87%
Avgs Rural 5 No College Towns			22,231	87%	131%	101%
Avgs 5 Suburban College Towns			44,152	87%	152%	91%
Avgs 3 Rural BIDs				93%	121%	
Averages 5 BIDs				91%	123%	

Source:https://analytics.placer.ai/the-square/recovery-dashboard/new-york/new-york-county/ .
Empty cells = no available data

As can be seen in Table 7, on average, the five BIDs had a recovery of retail chain foot traffic of 91% in May 2023 compared to May 2019, and an average recovery of 123% for domestic tourism foot traffic. Comparable stats for the 21 towns and cities in the table were 87% and 135% respectively. In other words, the trend in the BID recoveries seems to have a meaningful ballpark similarity to what is happening overall in our smaller towns and cities, be they a college town or not.

Retail chain recovery in these towns and cities and their downtowns seems to be in the mid-80% to low 90s% range, close to but still lagging a complete recovery to pre-crisis levels. Given the continuing presence of creative destruction in the retail industry, this level of recovery should be seen as a sign of the strength of these towns and downtowns, not of their weakness. Moreover, time is still needed to see how various retail growth potentials will play out. For example, it will take a few more years to see how new independent merchants are able to capture the large market shares given up by the chains, and the role omnichannel marketing will play in that. Also, the fact that retail chains are reportedly looking for smaller spaces, with 3,000 SF now a sweet spot, could make more of these suburban cities and downtowns attractive. In my consulting practice in NJ and NY, several suburban downtowns could

FIGURE 2. VISITS BY LOCAL AND NATIONAL TOURISTS TO DOWNTOWN ITHACA, NY, MARCH 2000 TO MAY 2023



Source: Placer.ai :https://analytics.placer.ai/the-square/recovery-dashboard/new-york/tompkins-county/ithaca/downtown-ithaca-alliance

not attract retail chains because they did not have large enough spaces, and several undertook mixed-use development projects to create them. Also, retailers seem to have understandably adopted a kind of locational conservatism, seeking only the safest locations. Given that there is a limited supply of such locations, retail chains may in the near future be looking at some of these smaller cities and downtowns if they have adequate market potentials and attractive space offerings.

Downtown leaders, however, need to be realistic about their retail expectations. Most big volume retailers will want to be on large sites close to major highways, and few of such sites are in their downtown cores. The town/city might attract one or more large supermarkets like Wegmans or a Walmart Superstore and some other big box merchants, but they are very unlikely to locate in the heart of the downtown. Retail in these downtowns has become more ancillary, dependent on the customer traffic driven by other downtown uses. However, the availability of such retail can increase the number of destinations visited on a downtown trip and increase visitor satisfaction. Strong retail niches, however, can still be very magnetic.

While retail will still be important in drawing downtown visitation in the near future, the strong growth in domestic tourism is the most attention-getting trend shown in Table 7. The five BIDs experienced a 123% recovery from their precrisis levels. Yes, this is somewhat lower than the 135% recovery for all 21 cities, and the 133% of the college towns, but close enough to reasonably conclude all are part of a common underlying trend. Two of the BIDs in college towns, Ithaca and Chapel Hill, have had strong recoveries in domestic tourist traffic of 168% and 166% that were stronger than those of their cities, 121% and 99%.

Figure 2 shows the recovery of the foot traffic of local tourists coming from 51-150 miles and national tourists coming from 150+ miles into the downtown Ithaca BID's area between March 2000 and May 2023. Notably, in 21 of the 39 measurements displayed, national tourist recovery was greater than the local tourist recovery. Initially local tourists led the tourist recovery, but the national tourists soon took the lead and have since retained it. Nationally, foreign tourism is recovering more slowly. It is doubtful that precrisis visitation levels will be reached in the near future, but the type of towns and cities discussed here never attracted large numbers of foreign tourists.

A critical defining characteristic of downtowns is their multifunctionality, and my research and field visits have shown that even in small towns like Sherwood, WI, population about 3,200, can have business districts with a significant amount of multifunctionality. Besides retail they can have pamper niches, eateries, government offices, churches, parks, real estate brokers, lawyers or other uses. The larger among them can also have movie theaters, performing arts centers and museums. The Placer data presented in Table 2 and 7 do not cover such visits, nor do they get into the degree that these visits are to multiple downtown destinations. It is important to highlight the fact that the ability of these downtowns to attract visitors not only depends on their consumer market areas, but also on the magnetism of their venues. Also, the more magnetic their venues, the more destinations visitors will go to on each downtown trip.

These smaller downtowns are likely to have relatively stronger central social function venues than their larger cousins. Pivotal among them are their restaurants, bars and other third places.[14] Unfortunately, I could not find Placer data on dining foot traffic for three of the five BIDs, but those available for the towns and cities suggest they are making a recovery similar to retail's, strongly on the way back, but not quite there yet. These central social function venues are often the places tourists and trade area residents find the most magnetic.

CONCLUSION

Large or small, our downtowns are not going away, but they are recovering and changing. As Fogelson has argued, reinvention is in the very nature of our downtowns.[15] Just as the reinvention happening in the retail industry has been wrongly seen as apocalyptic, the changes in our downtowns have been wrongly treated as evidence of their being in a doom loop.

For decades now, there has been a misconception that downtowns and CBDs are one and the same thing, and that lots of office jobs in large clusters of office buildings were what made downtowns attractive and successful. Today, there is the growing realization that such central business functions and their clusters of office buildings are just one part of a downtown, and that there can be a whole lot more to them than work, jobs and business transactions. Downtowns are important places for people to meet, connect, have fun, and satisfy important individual needs. Yes, jobs and downtown workers will always be valuable, but increasingly downtown residents and other visitors will be of equal or even greater value. Making our downtowns attractive to these visitors and residents will be as or even more important as attracting more well-paying jobs.

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