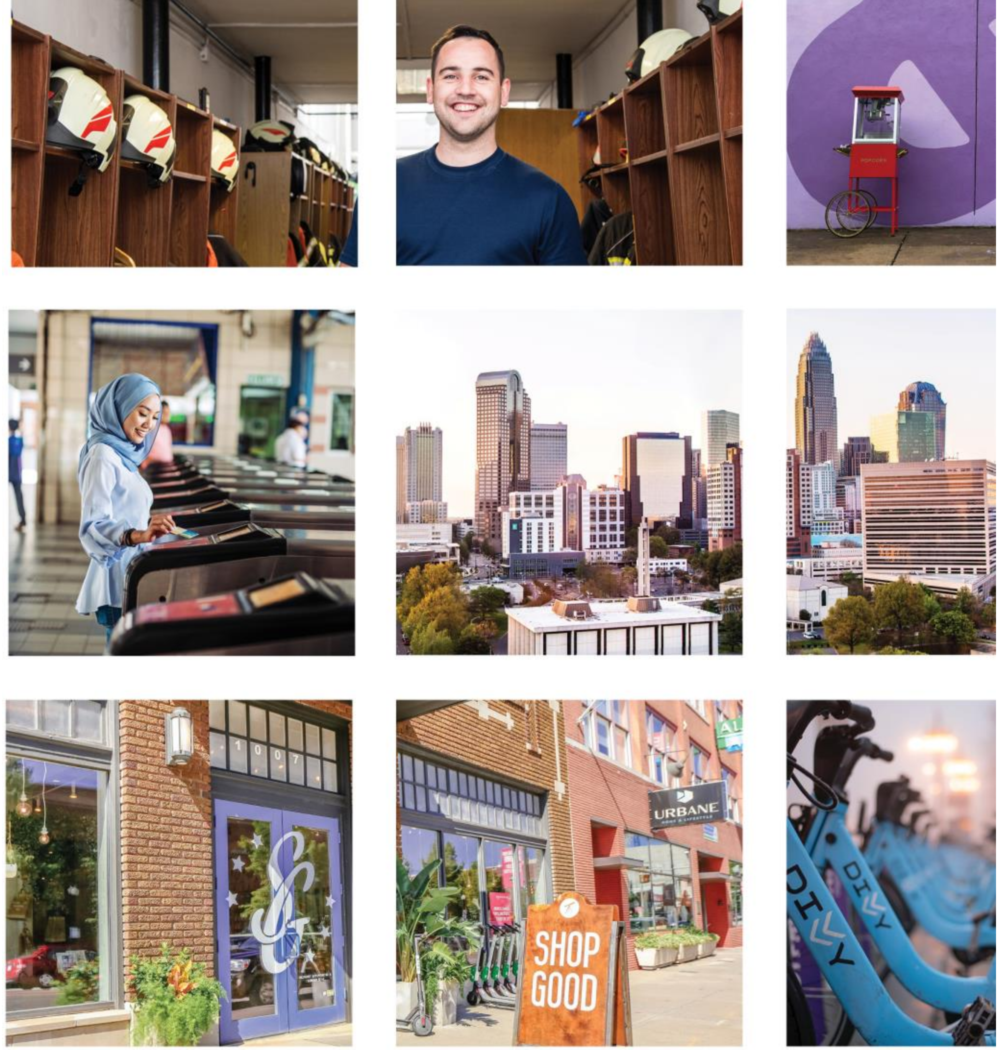


INSPIRED LEADERS
SHAPING CITIES

Shaping Cities
for a Post Pandemic Future

St. Paul Downtown Alliance

April 2022

David Downey, President & CEO
International Downtown Association


BAROCK
HARBOUR GRILL
HARBOUR GRILL
ZELESTE

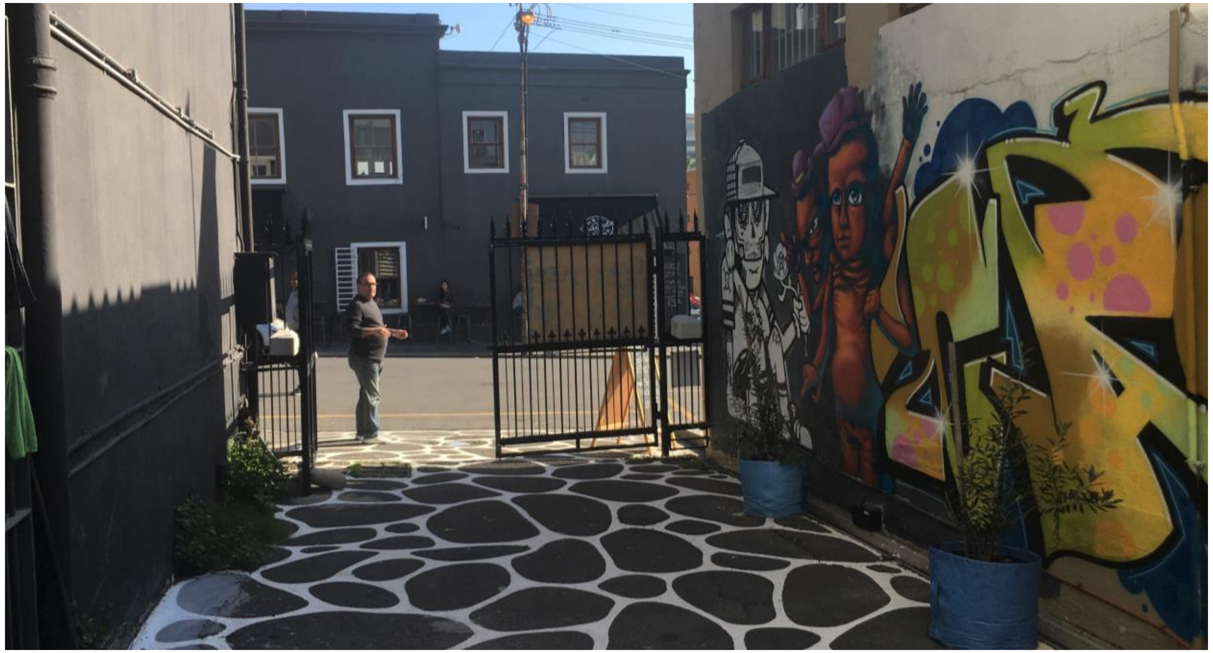

TAUNG


Huntington


NAPKIN FRIENDS


Downtown Seattle Association
Seattle Parks & Recreation


See's CANDIES




"it's never too late to bloom"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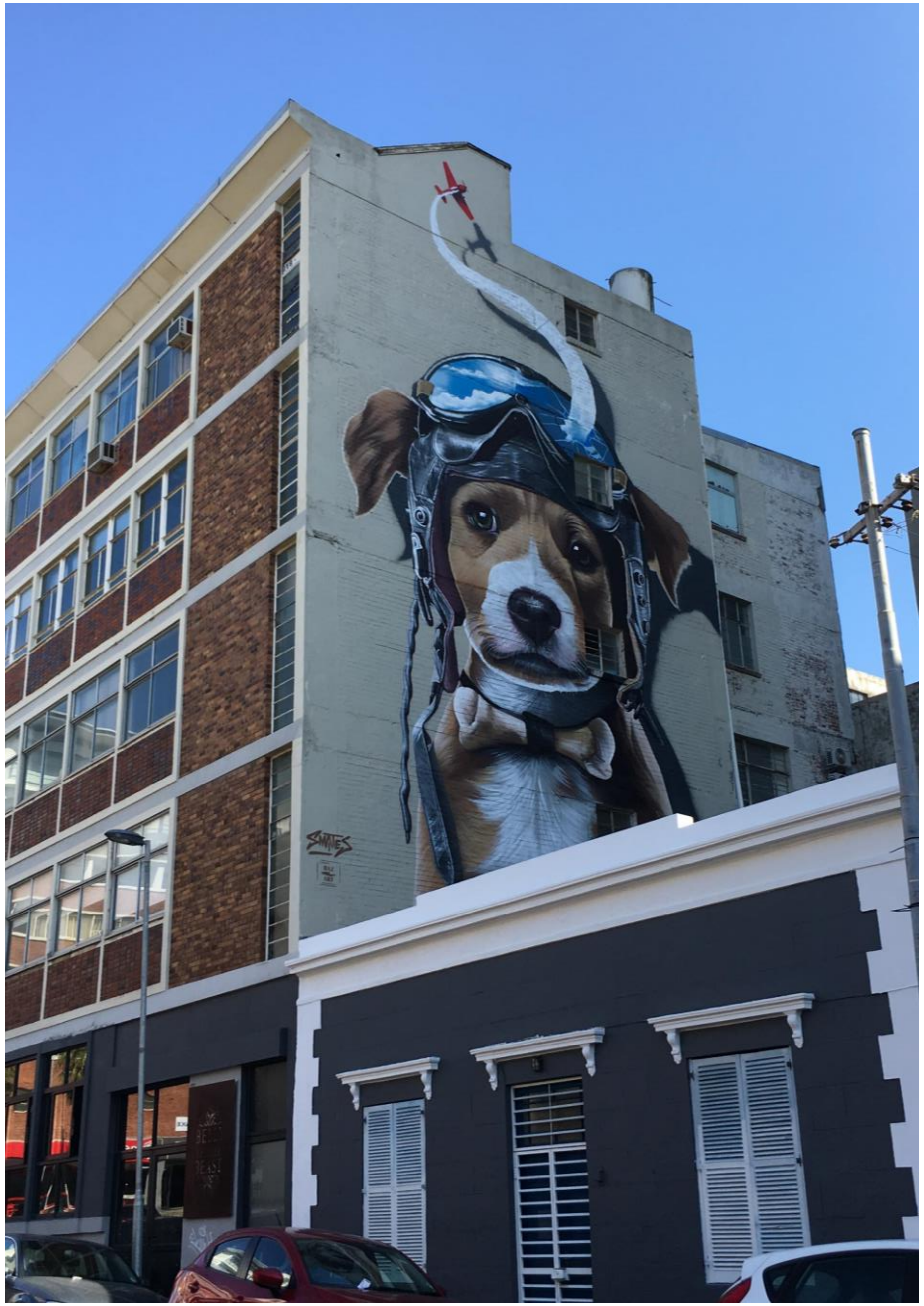
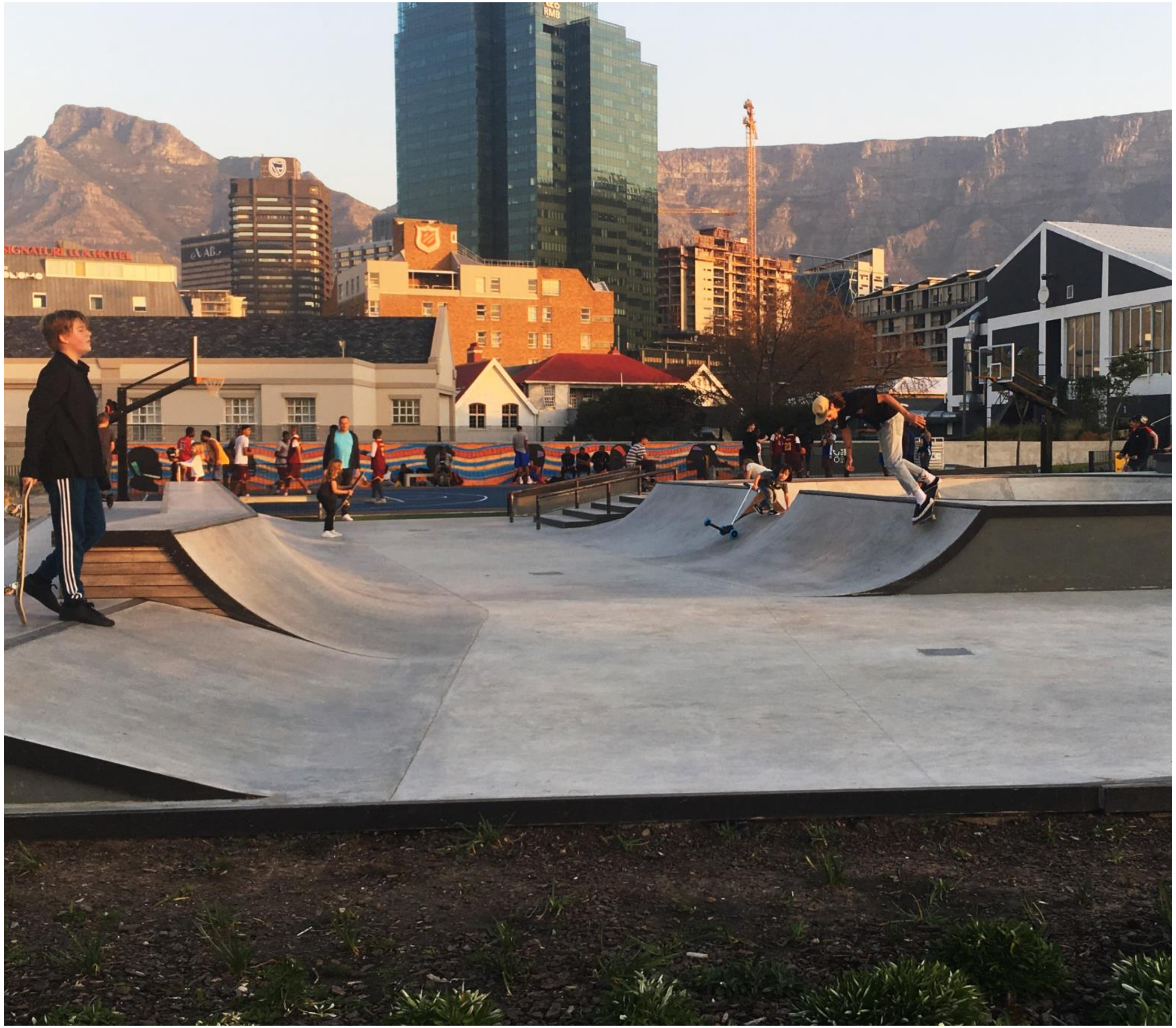
FOODS
PLASTIC-FREE GROCERY
ENTRANCE
VEGAN
CARAVAN
OF LOVE
ROOTIS
FALAFELS
SMOOTHIES
JUICES



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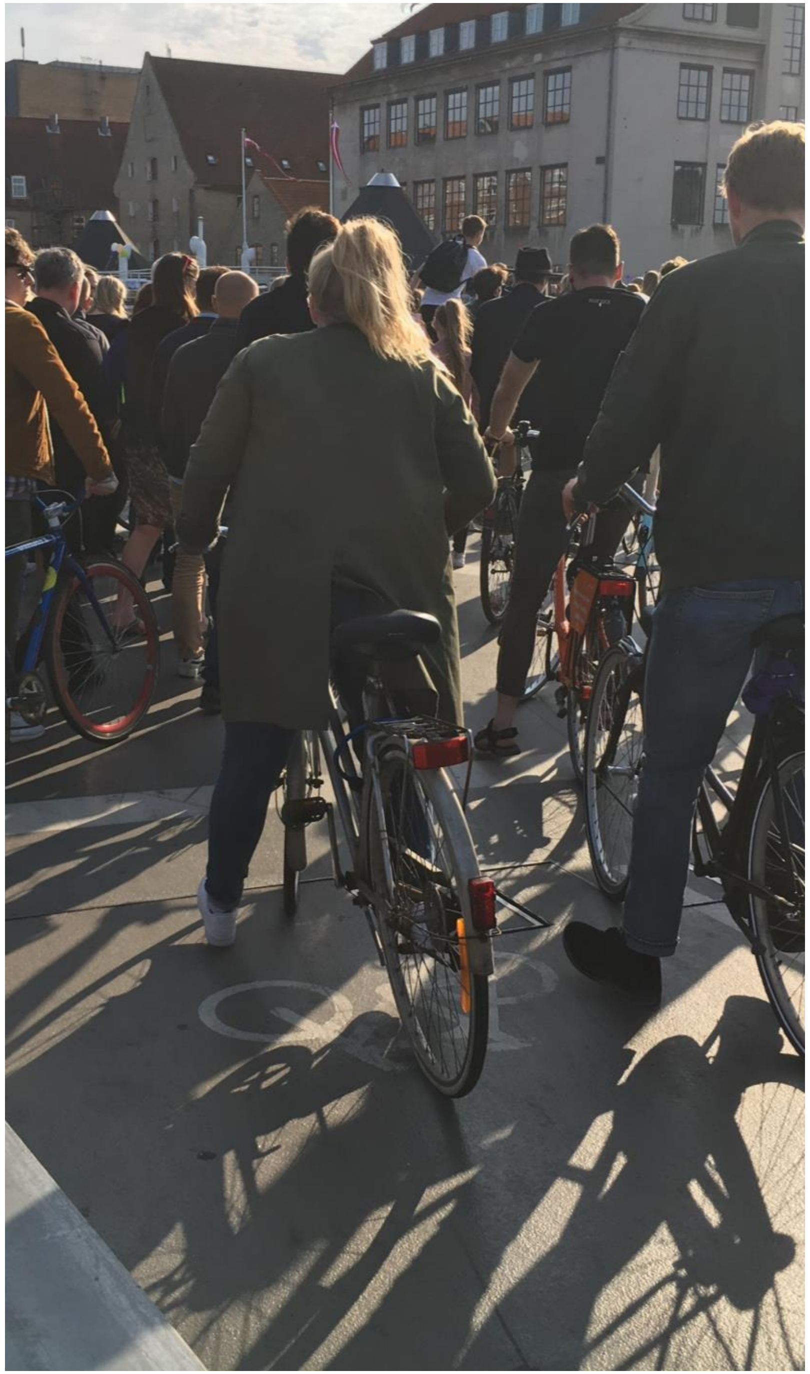
Sankofa
Fresco's

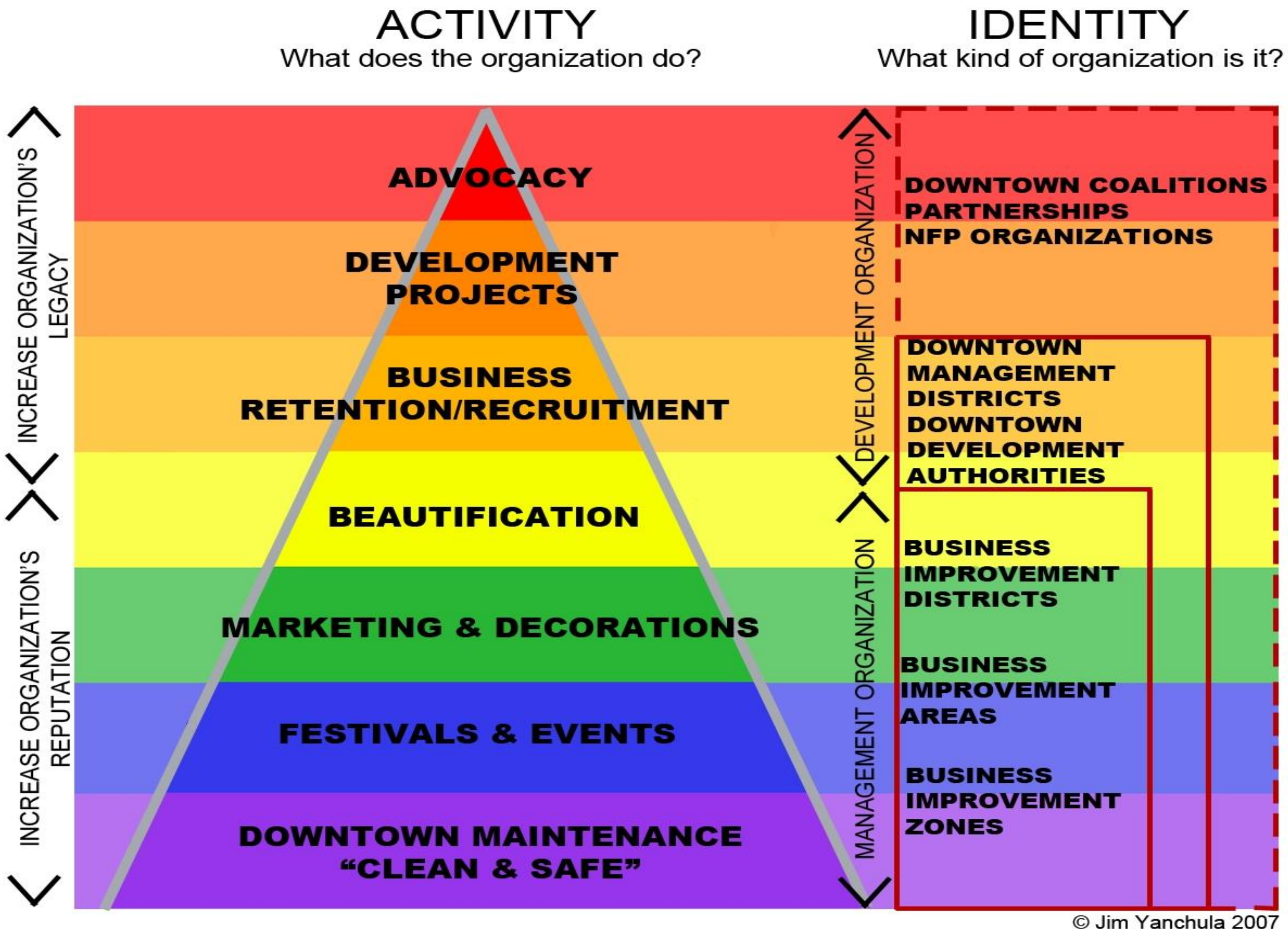


“Most city diversity is the creation of incredible numbers of different people and different private organizations, with vastly differing ideas and purposes, planning and contriving outside the formal framework of public action.

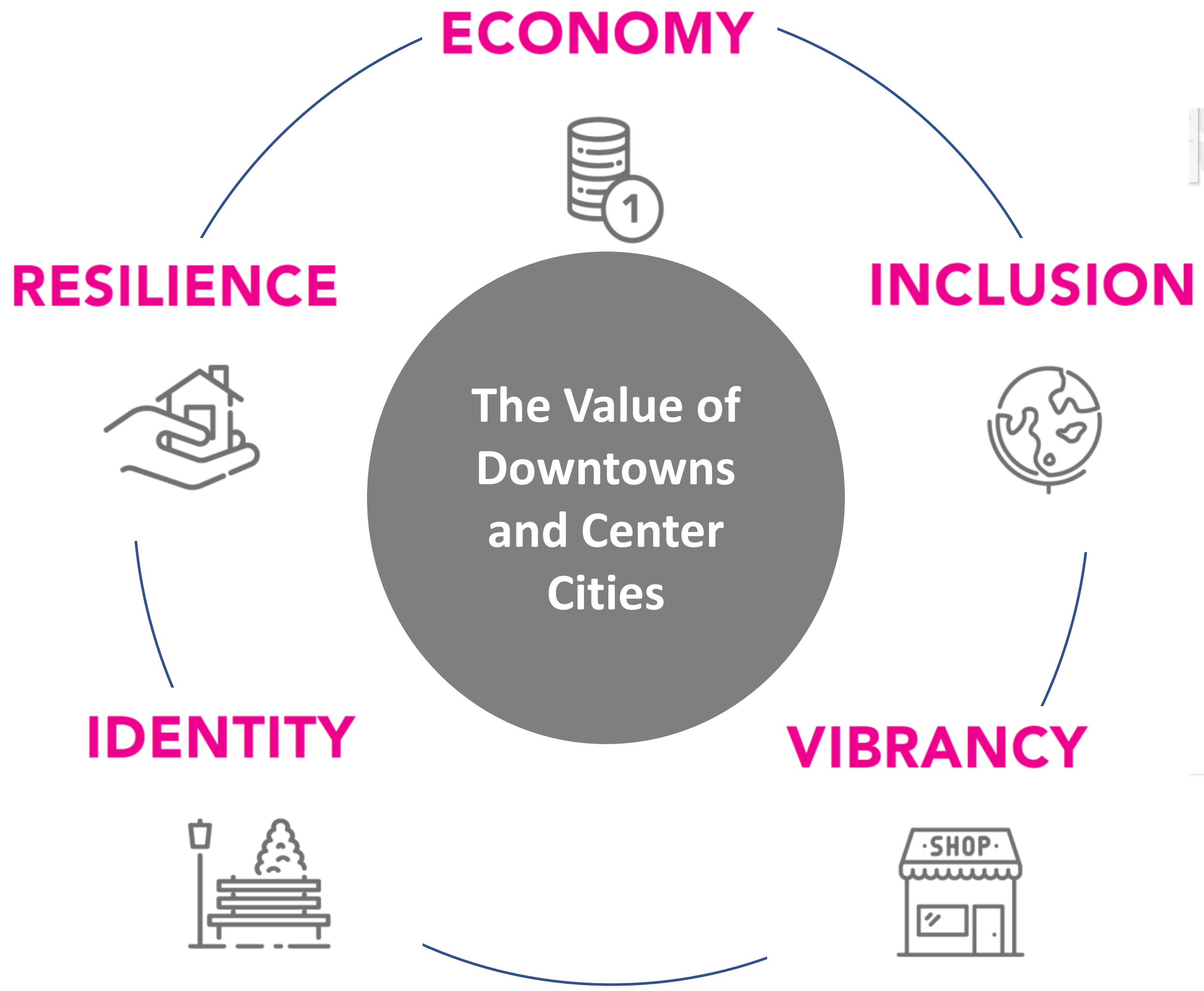
The main responsibility of city planning and design should be to develop … cities that are congenial places for this great range of unofficial plans, ideas and opportunities to flourish.”

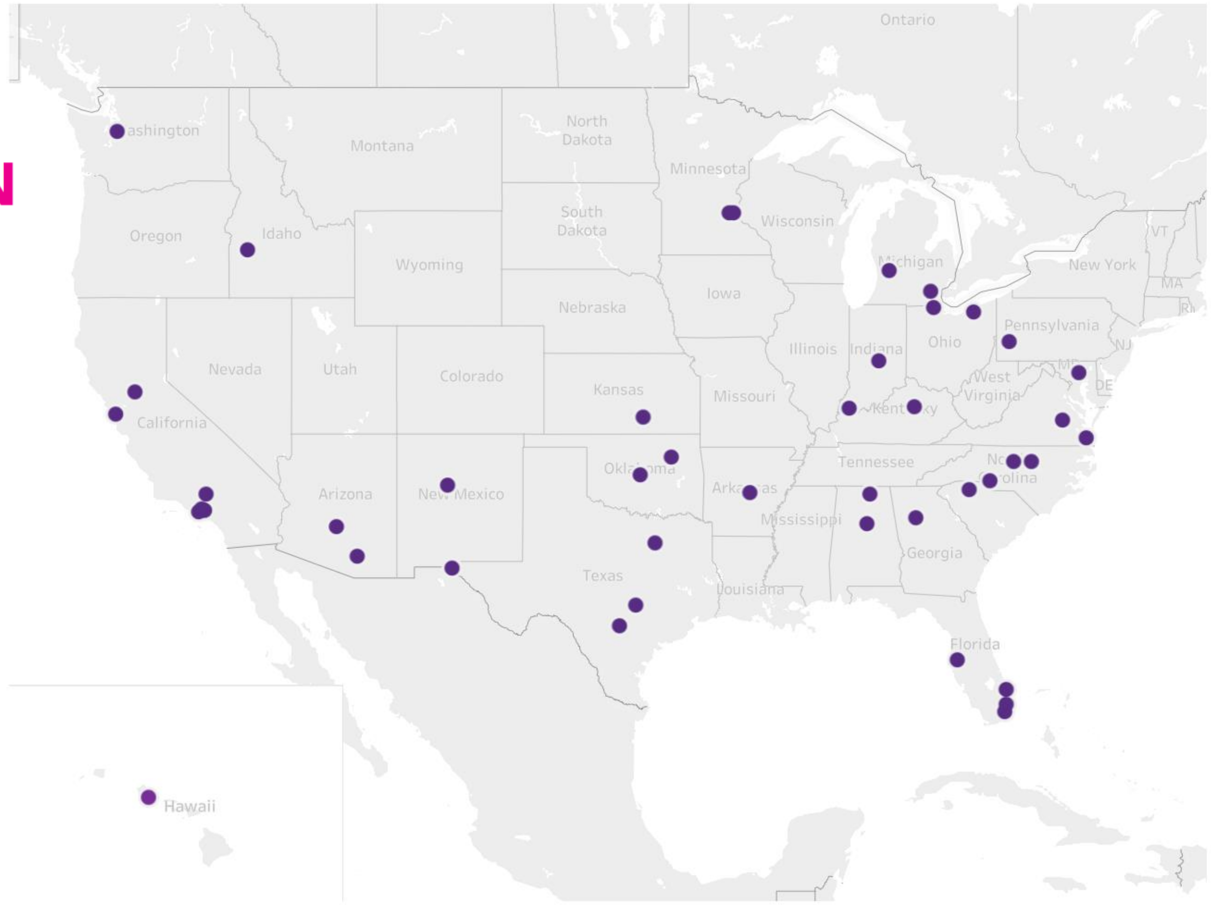
-Jane Jacobs

Urban Place Management

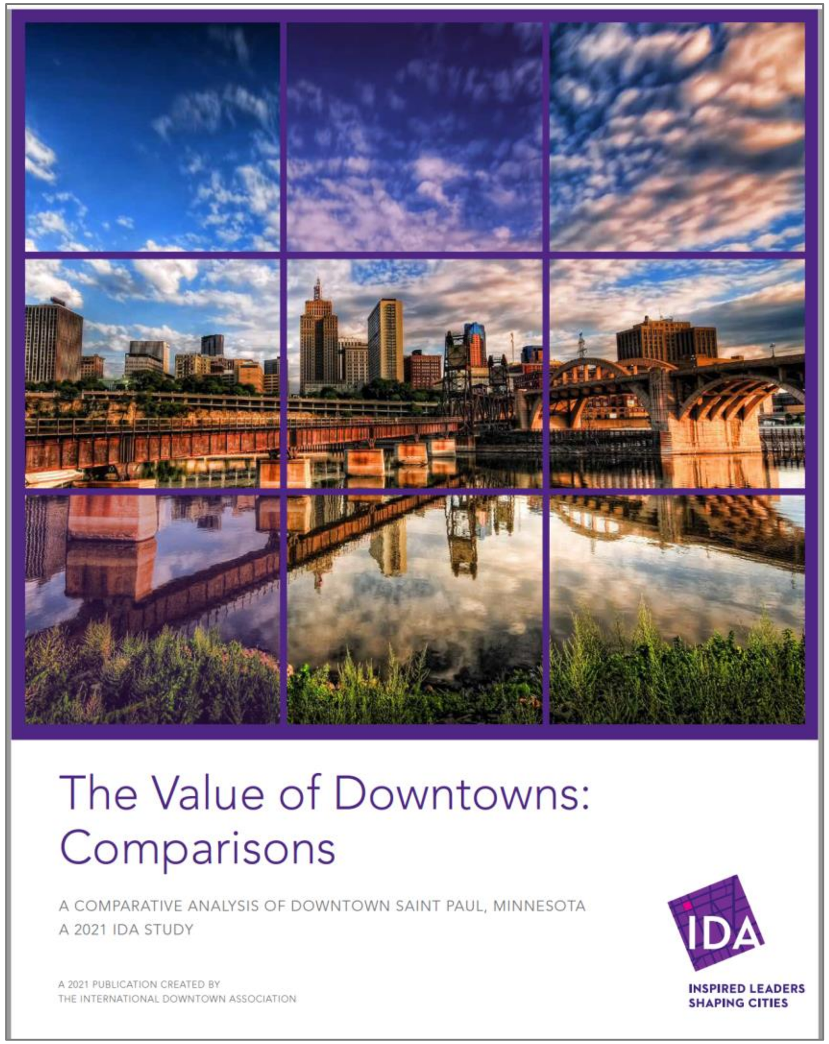


Five Principles of Downtown Value



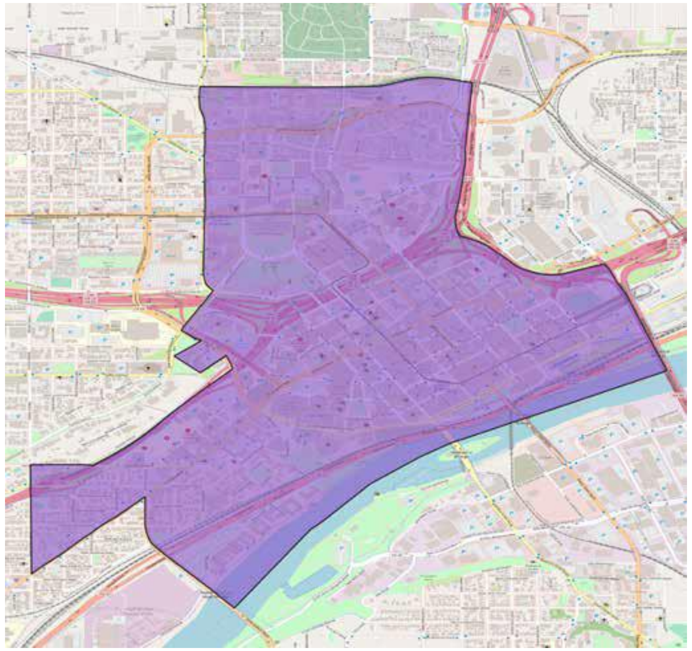


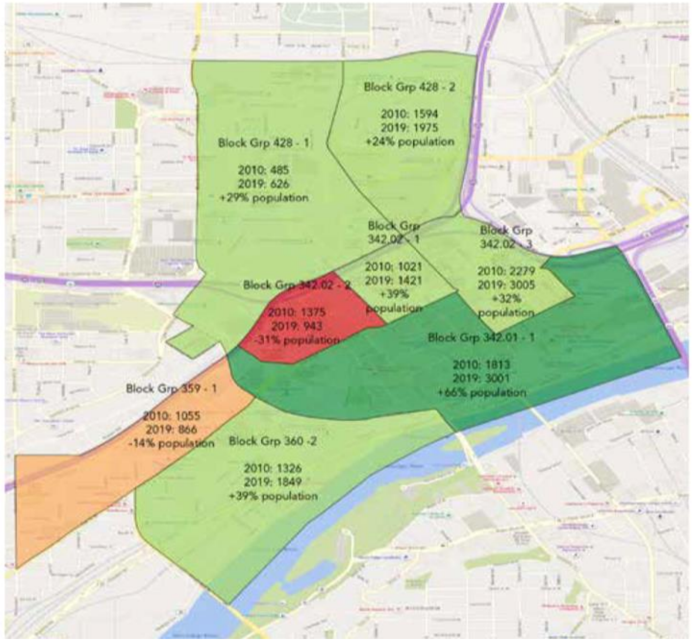
The Value of Downtowns Comparisons



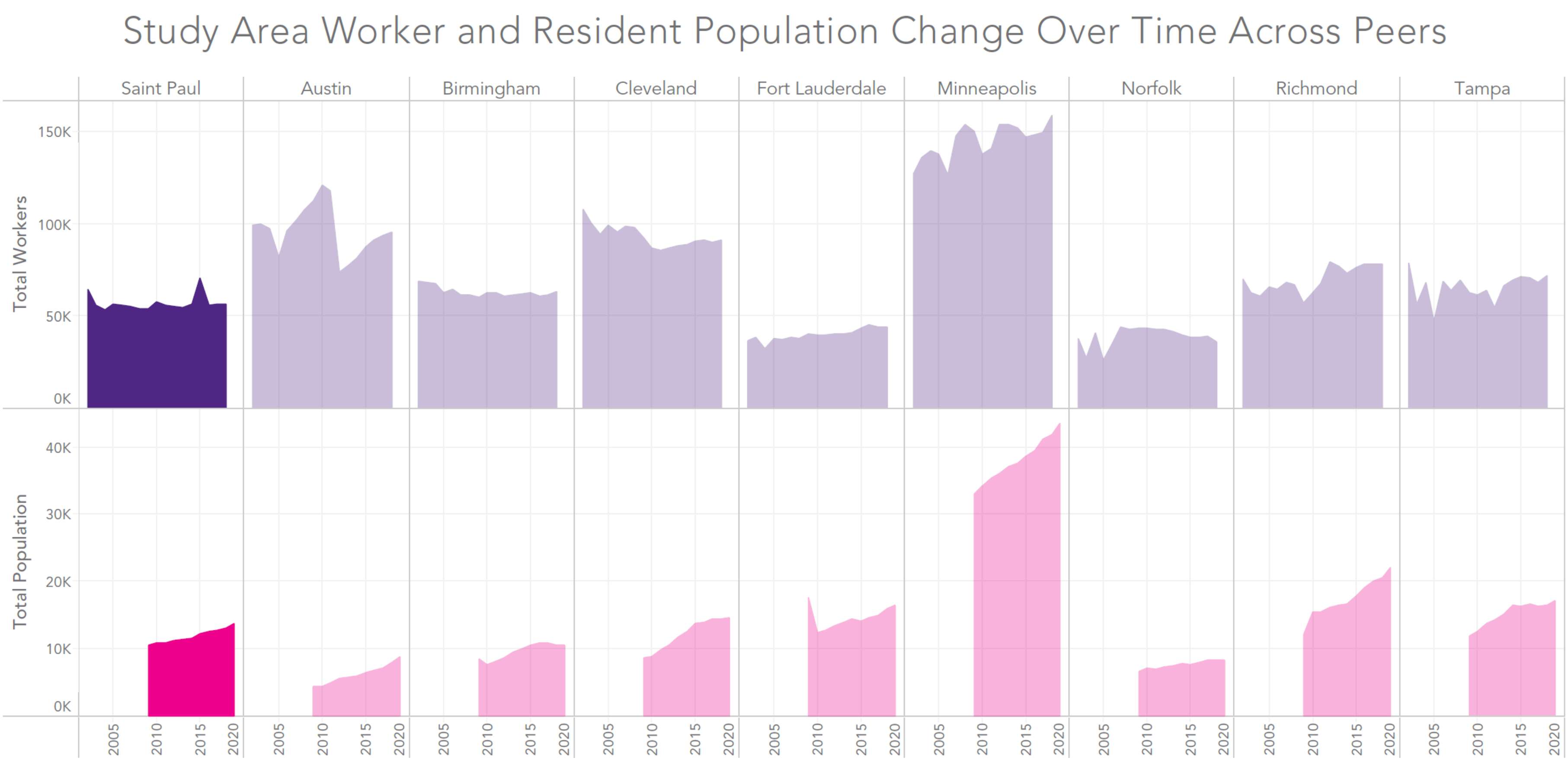
St. Paul falls into the "growing" tier averaging

- 5% of citywide population
- 24% of citywide jobs
- medium-high densities and noticeable growth across many real estate categories





The Value of Downtowns Comparisons



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

Saint Paul, MN
Austin, TX
Birmingham, AL
Cleveland, OH
Fort Lauderdale, FL
Minneapolis, MN
Norfolk, VA
Richmond, VA
Tampa, FL

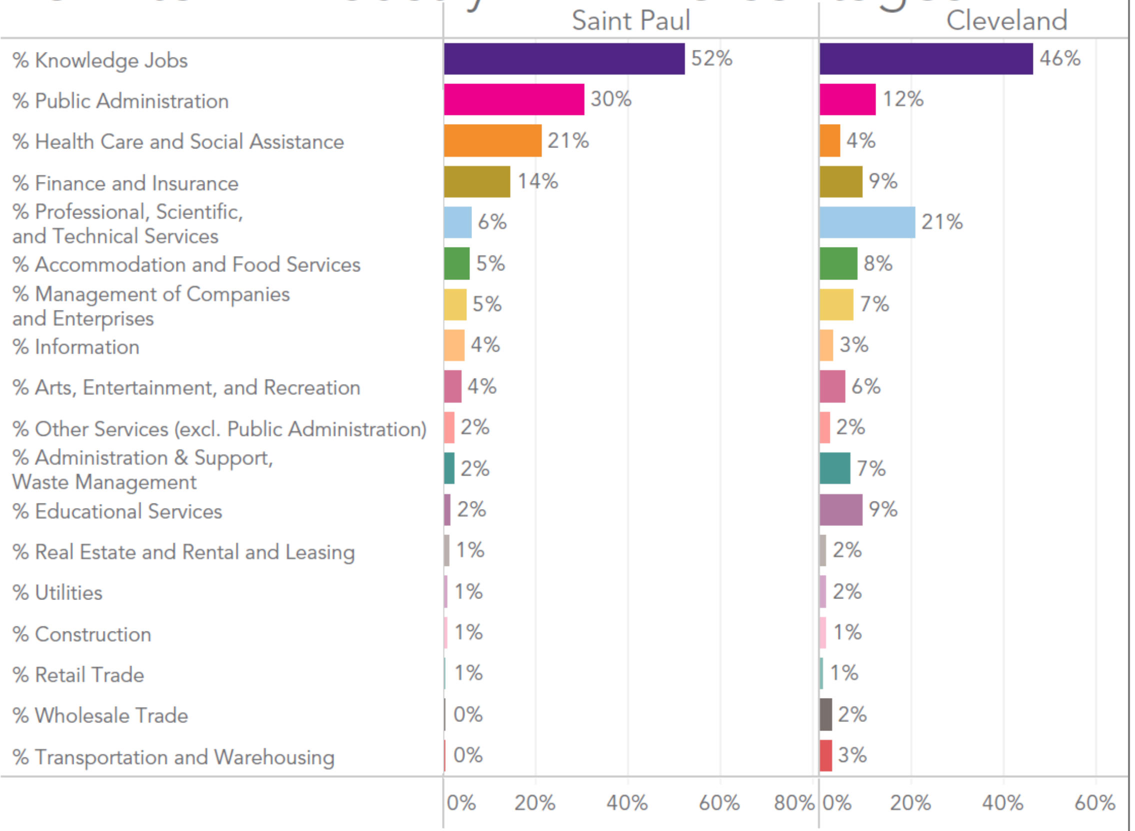
The Value of Downtowns Comparisons

Employment

	DOWNTOWN SAINT PAUL	GROWING AVERAGE	COMPARISONS GROUP AVERAGE	STUDY AVERAGE
GROWTH IN EMPLOYMENT (2002–2018)	-12%	38%	7%	19%
CITYWIDE JOBS	34%	24%	33%	25%
CITYWIDE KNOWLEDGE JOBS	44%	27%	39%	28%
CITYWIDE CREATIVE JOBS	72%	34%	44%	33%
RESIDENTS WITH A BACHELOR'S DEGREE OR HIGHER	58%	57%	60%	49%

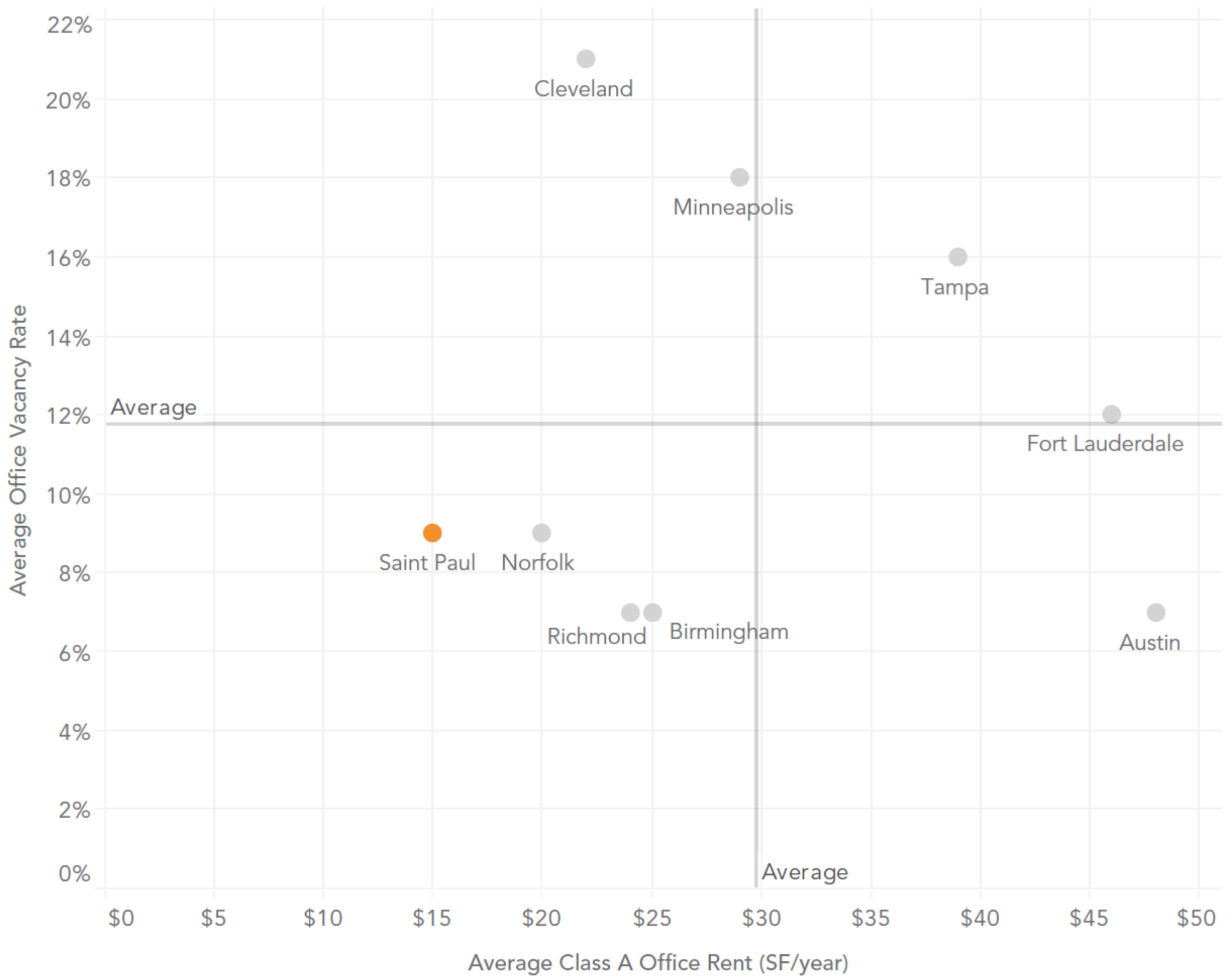
The Value of Downtowns Comparisons

Downtown Industry Mix - Percentages



Source: LEHD On the Map (2018)

Office Rent and Vacancy (Most Current Data Year)



The Value of Downtowns Comparisons

Residents

	CORE DOWNTOWN SAINT PAUL	DOWNTOWN SAINT PAUL	GROWING AVERAGE	COMPARISONS GROUP AVERAGE	STUDY AVERAGE
% OF CITYWIDE POPULATION	2.7%	4.5%	5%	6%	5%
% OF CITYWIDE 25-TO-34-YEAR-OLDS	4.6%	6%	6%	9%	7%
RESIDENT GROWTH AVERAGE 2000–2019	55%	35%	61%	61%	40%
DENSITY RESIDENTS / ACRE	21	13	9.7	13	11.7
DIVERSITY INDEX	58.6	66.5	59.8	62	62.8

Source: American Community Survey 2015–2019 and ESRI Business Analyst

The Value of Downtowns Comparisons

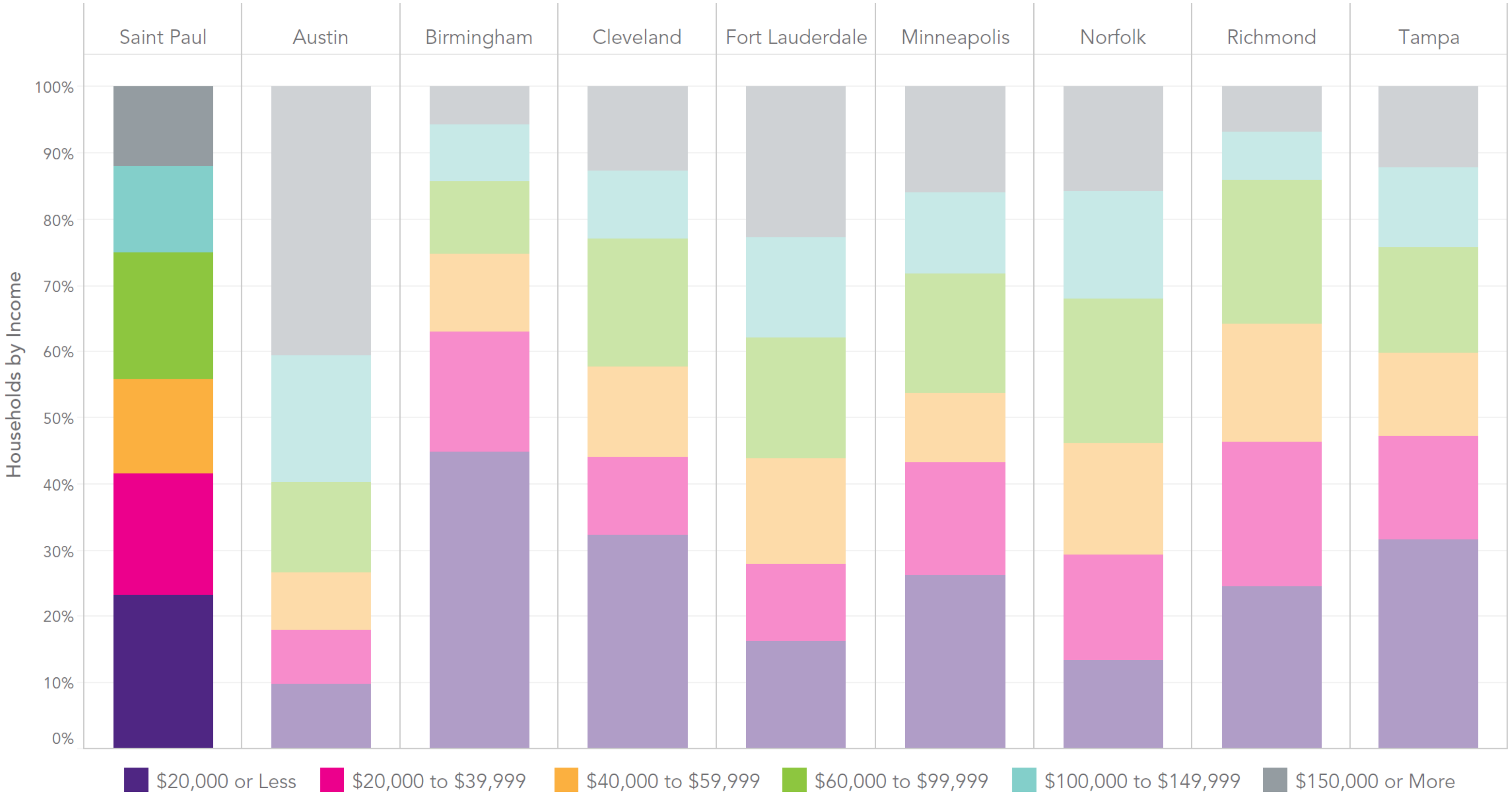
Income and Housing

	DOWNTOWN SAINT PAUL	GROWING TIER AVERAGE	COMPARISON GROUP AVERAGE	STUDY AVERAGE
MEDIAN HOUSEHOLD INCOME	$51,614	$57,778	$65,213	$50,298
MEDIAN GROSS RENT	$1,111	$1,325	$1,356	$1,156
MEDIAN HOME PRICE	$220,813	$461,379	$318,790	$367,228

Source: American Community Survey (2015–2019)

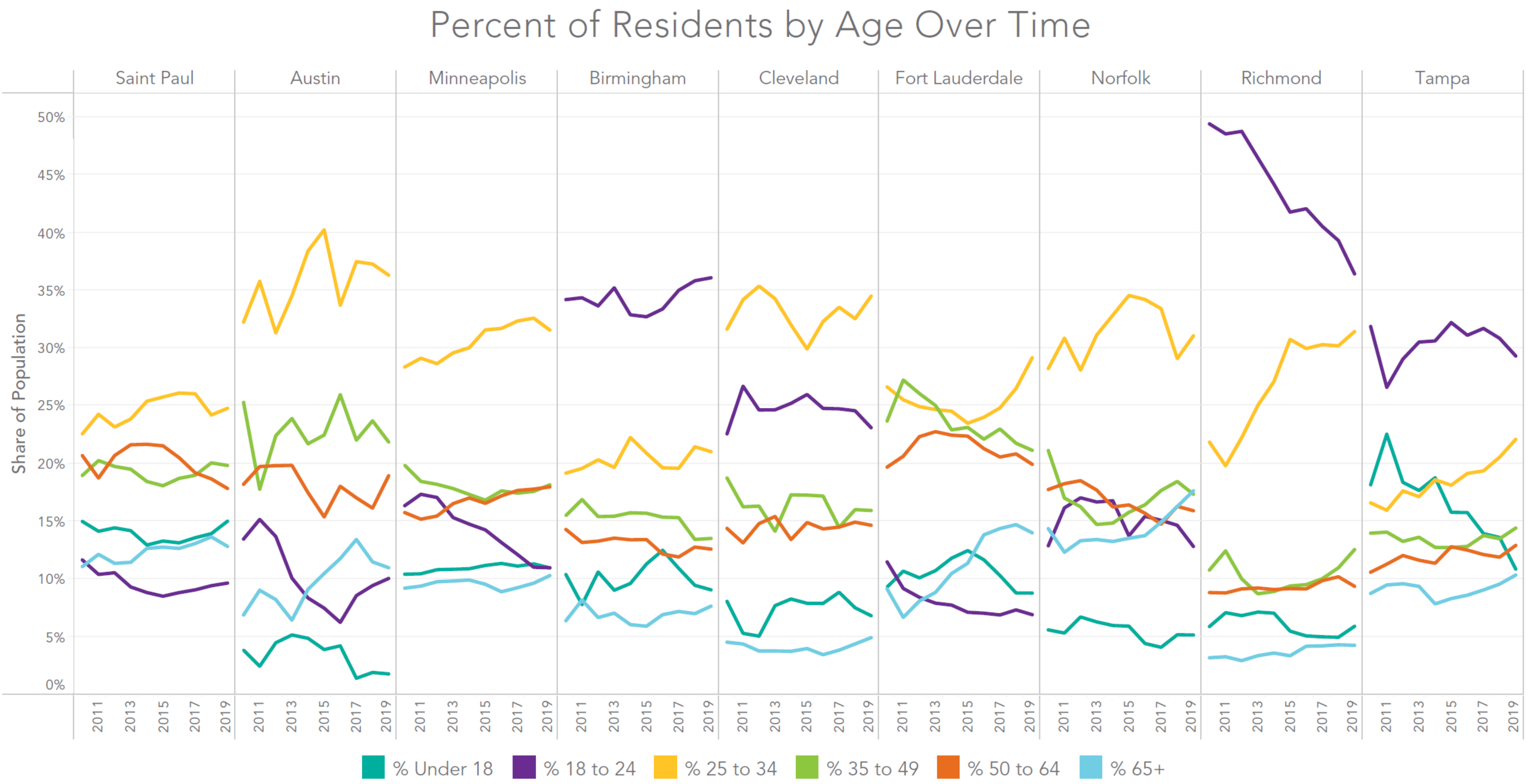
The Value of Downtowns Comparisons

Percent of Households by Income

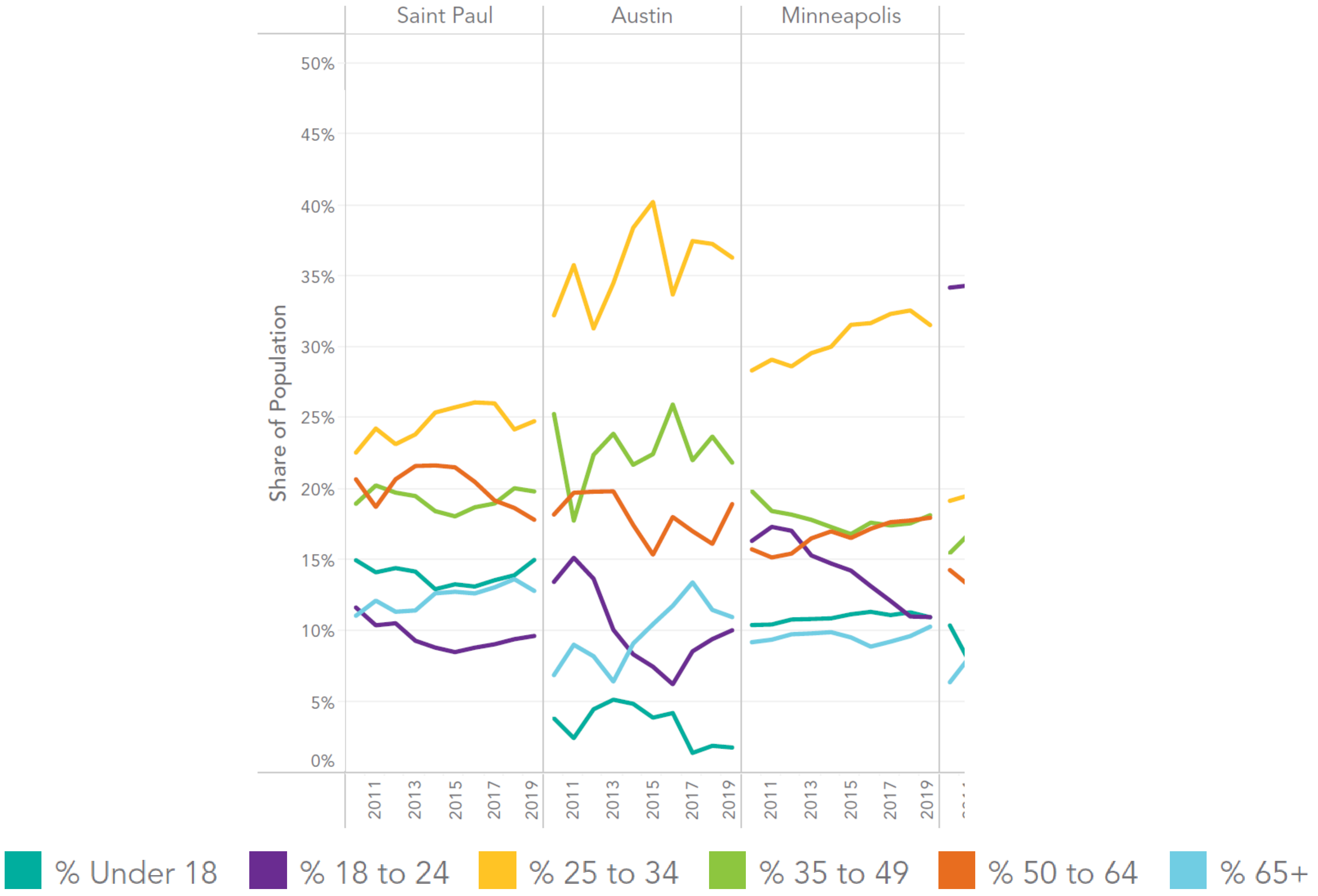


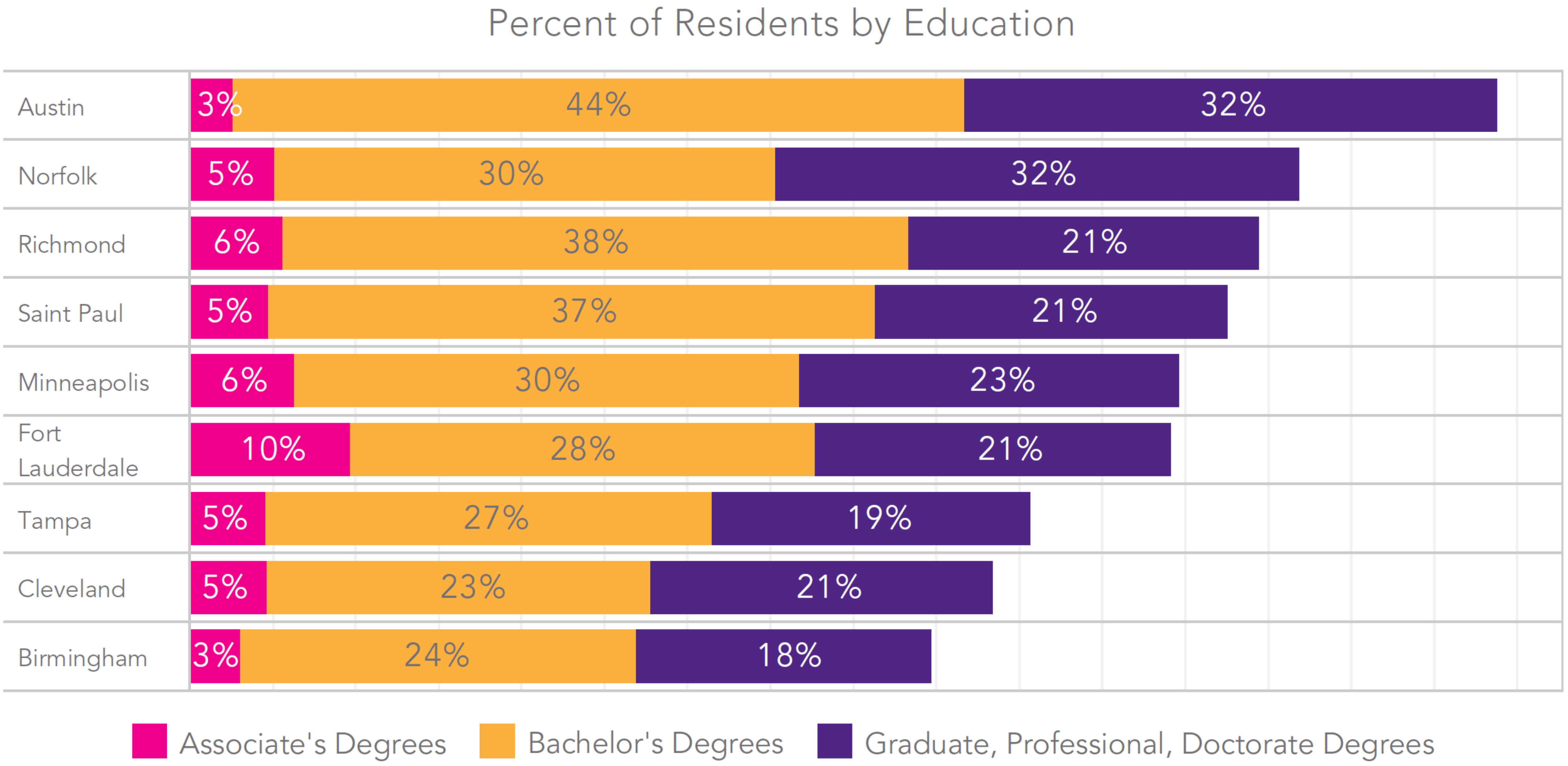
Source: American Community Survey 5-Year Estimates (2015–2019)

The Value of Downtowns Comparisons



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


Saint Paul
Austin
Minneapolis
Share of Population
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
2011
2013
2015
2017
2019
% Under 18
% 18 to 24
% 25 to 34
% 35 to 49
% 50 to 64
% 65+



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

The Value of Downtowns Comparisons

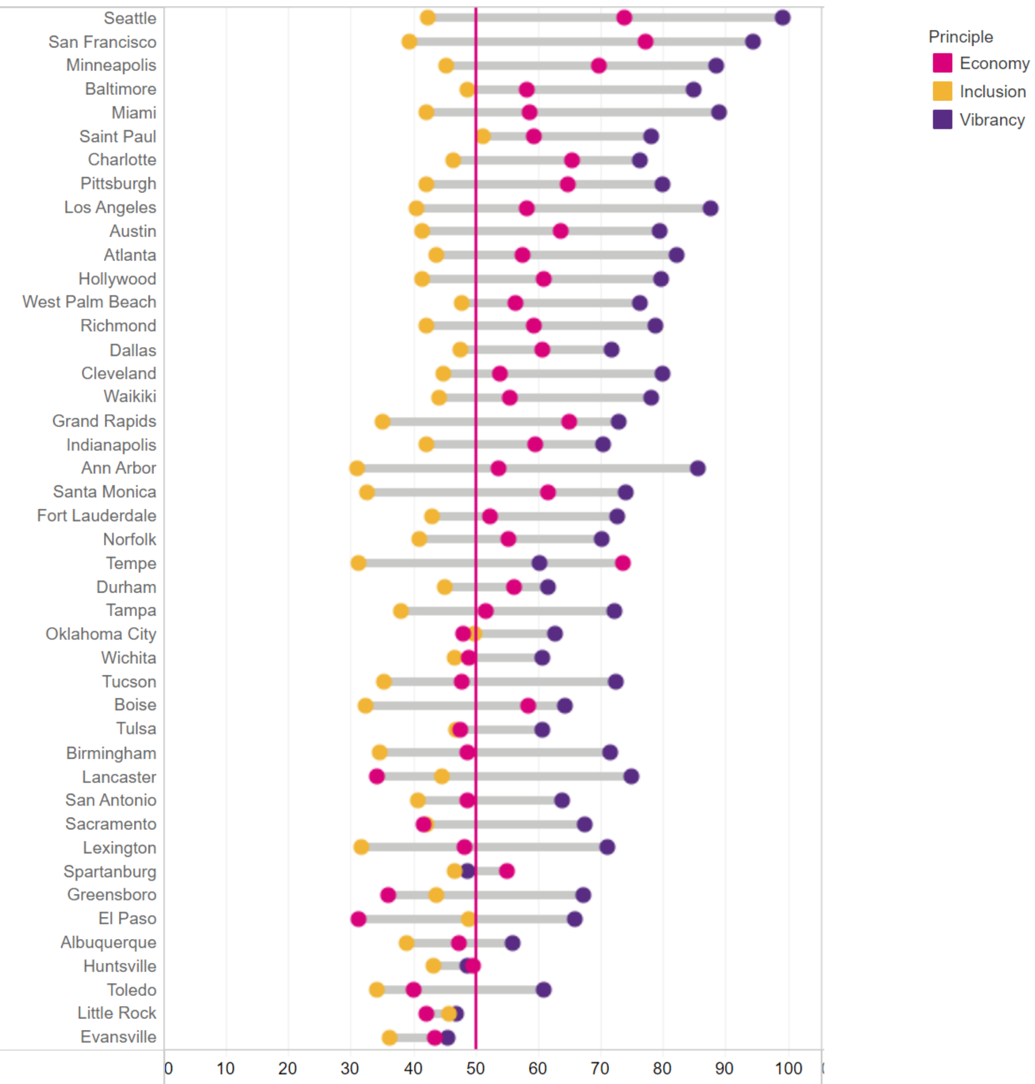
Retail

	DOWNTOWN SAINT PAUL	GROWING TIER AVERAGE	COMPARISON GROUP AVERAGE	STUDY AVERAGE
% CITYWIDE RETAIL SALES	12%	10%	14%	11%
RETAIL SALES PER SQUARE MILE	$181M	$302M	$246M	$390M
RETAIL BUSINESSES PER SQUARE MILE	134	230	198	263

Hotels

	DOWNTOWN SAINT PAUL	GROWING TIER AVERAGE	COMPARISON GROUP AVERAGE	STUDY AVERAGE
HOTELS	8	35	40	21
HOTEL ROOMS	1,572	3,699	5,639	4,599

IDA Vitality Index



*The gray line in each chart shows the national or regional average to which each metric is indexed.

Established Districts

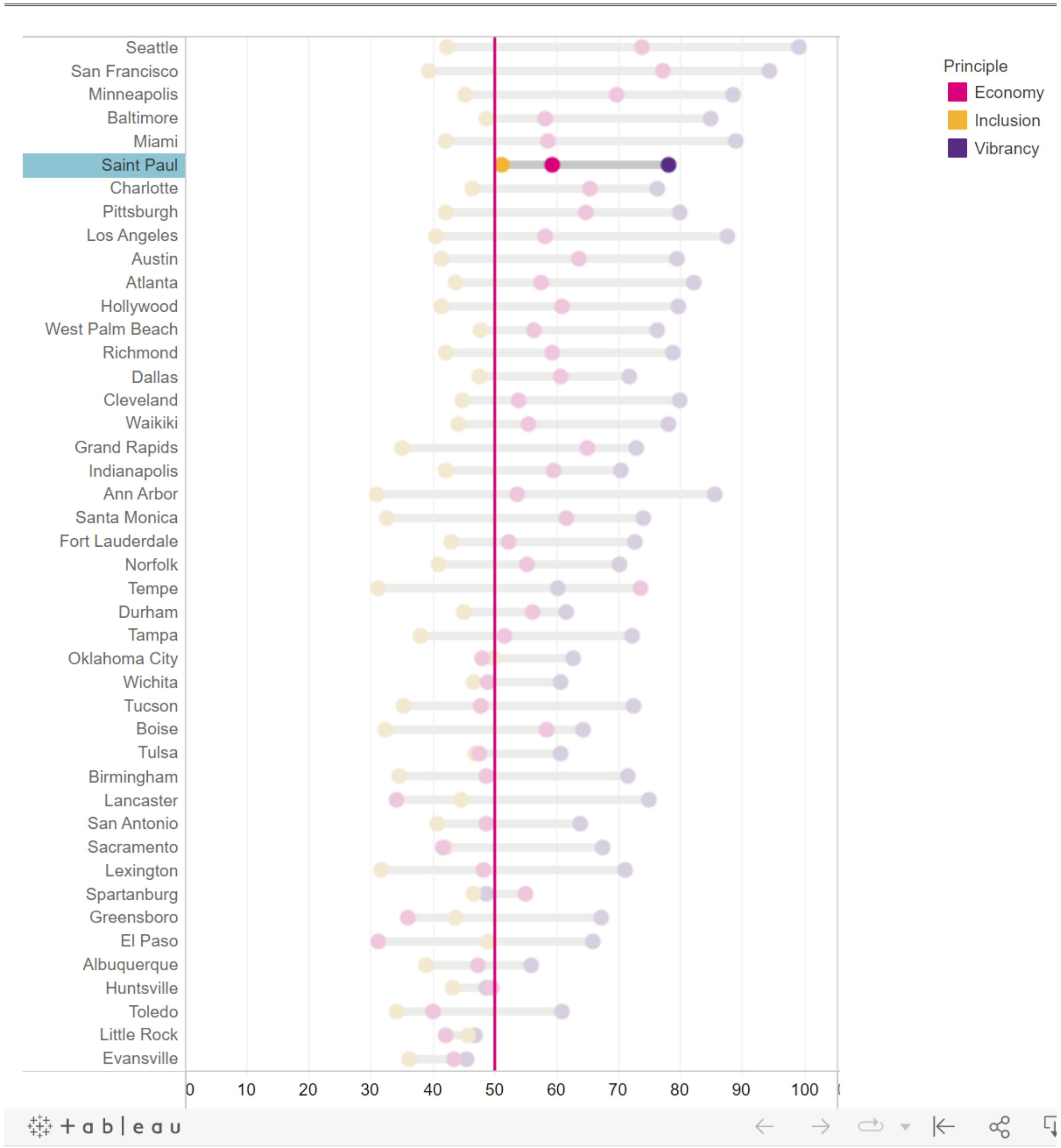
Baltimore
Fort Lauderdale
Miami
Minneapolis
Pittsburgh
Richmond
San Francisco
Seattle
Waikiki

Growing Districts

Ann Arbor
Atlanta
Austin
Boise
Charlotte
Dallas
Durham
Huntsville
Indianapolis
Lexington
Los Angeles
Norfolk
Sacramento
Saint Paul
Santa Monica
Tempe
West Palm Beach

Emerging Districts

Albuquerque
Birmingham
Cleveland
El Paso
Evansville
Grand Rapids
Greensboro
Hollywood
Lancaster
Little Rock
Oklahoma City
San Antonio
Spartanburg
Tampa
Toledo
Tucson
Tulsa
Wichita



Seattle
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Baltimore
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Charlotte
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Economy
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Vibrancy
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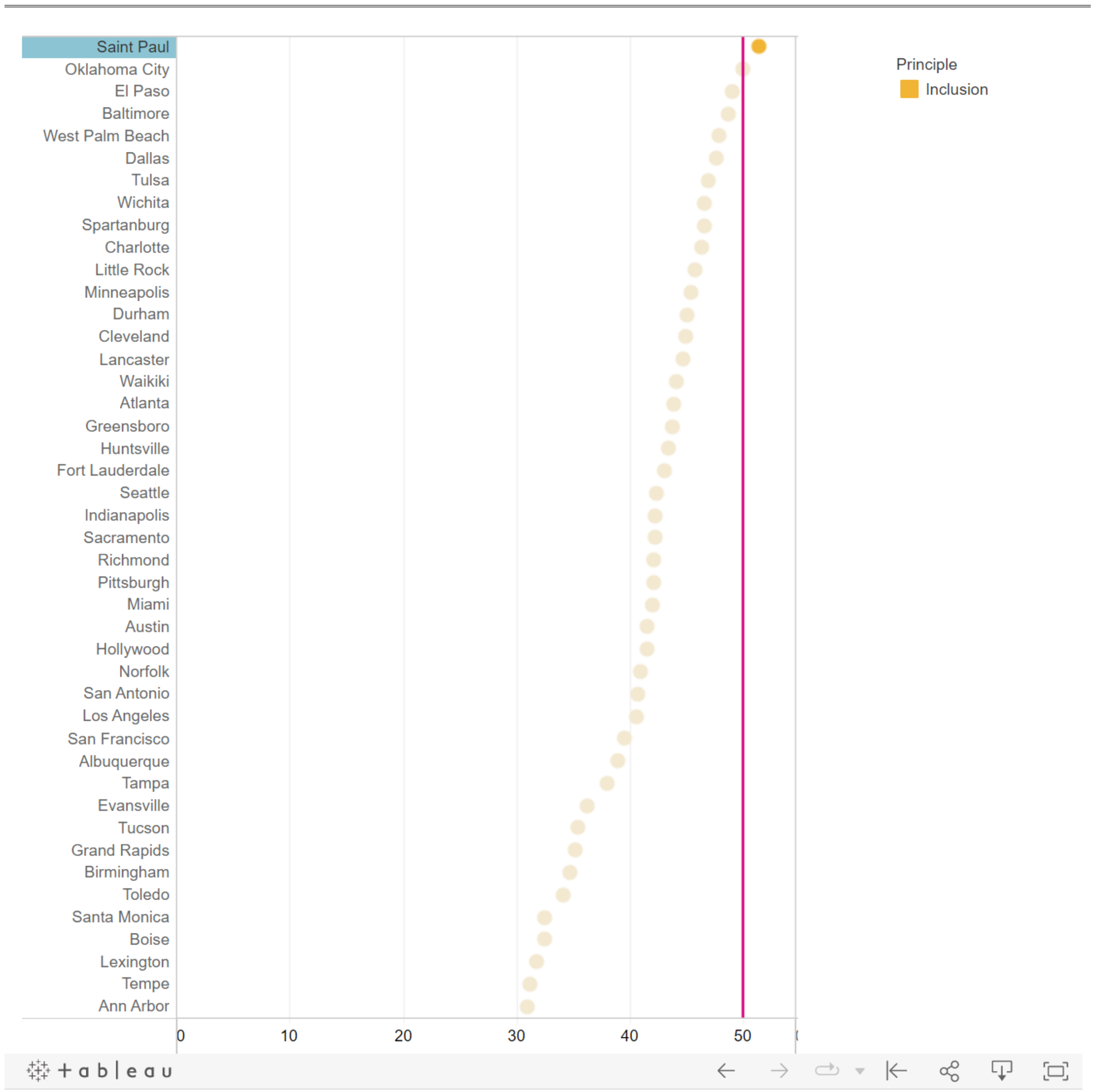

Saint Paul
Oklahoma City
El Paso
Baltimore
West Palm Beach
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Spartanburg
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Principle
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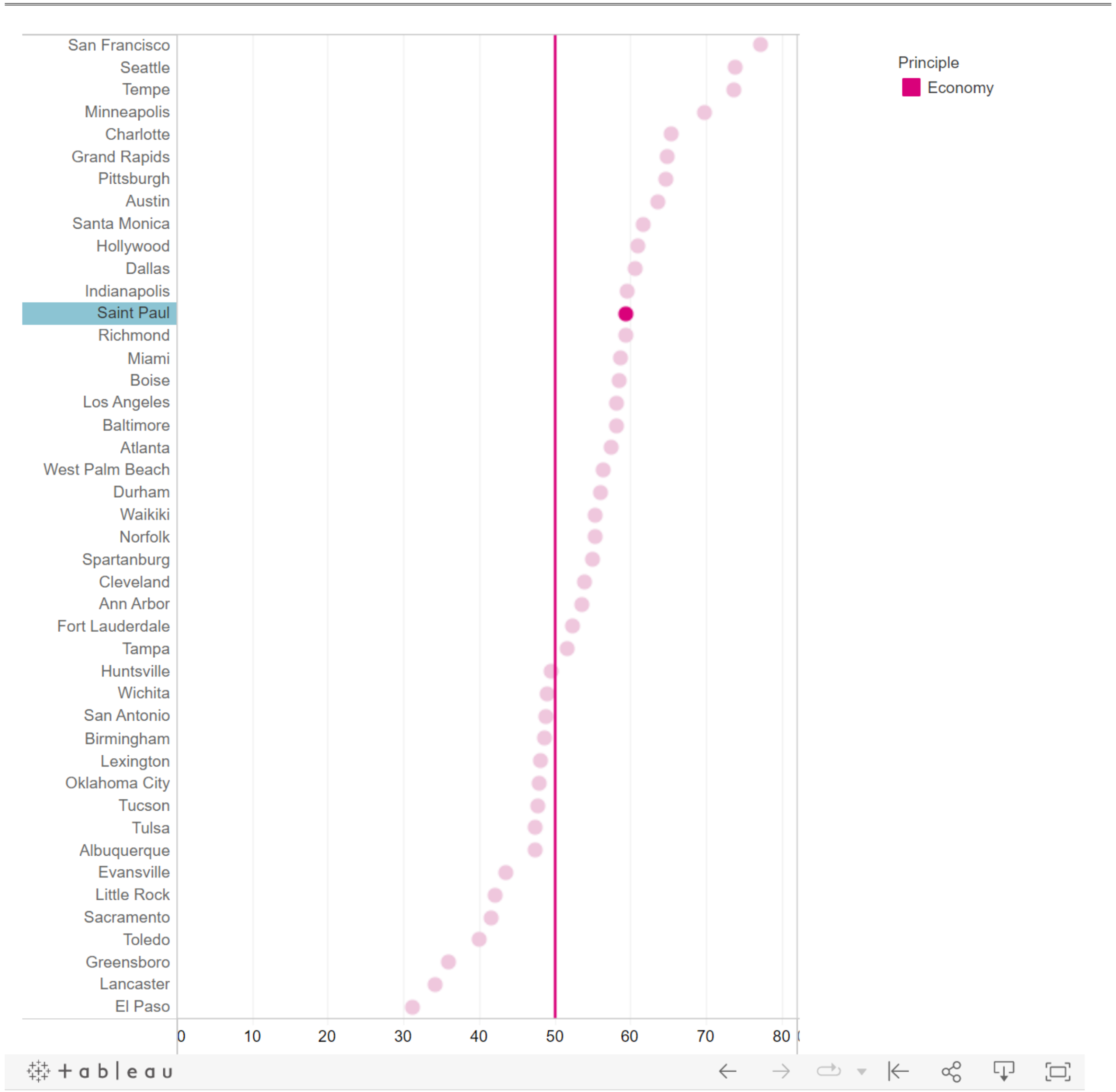
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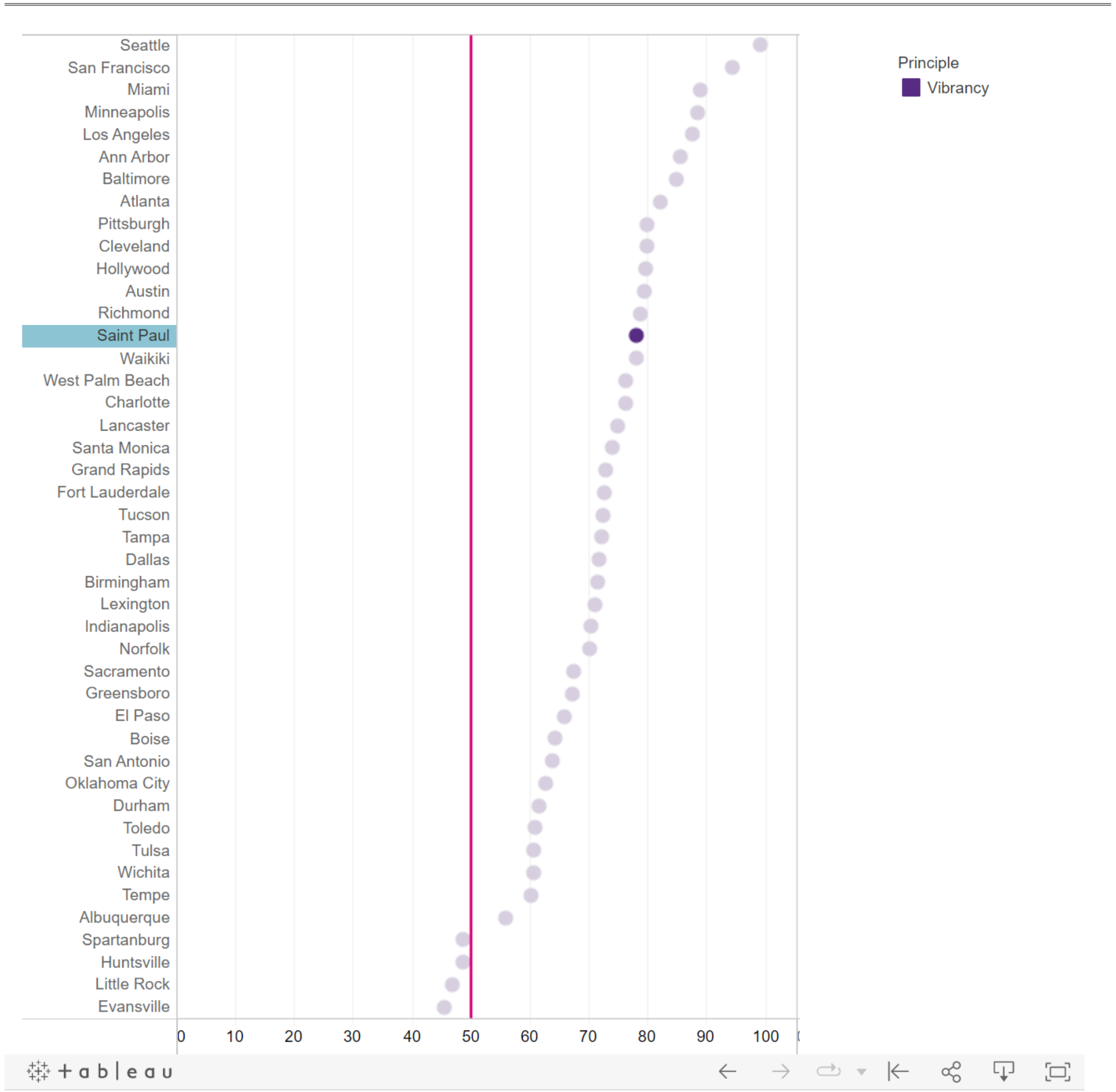
Principle
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Conclusions to Consider

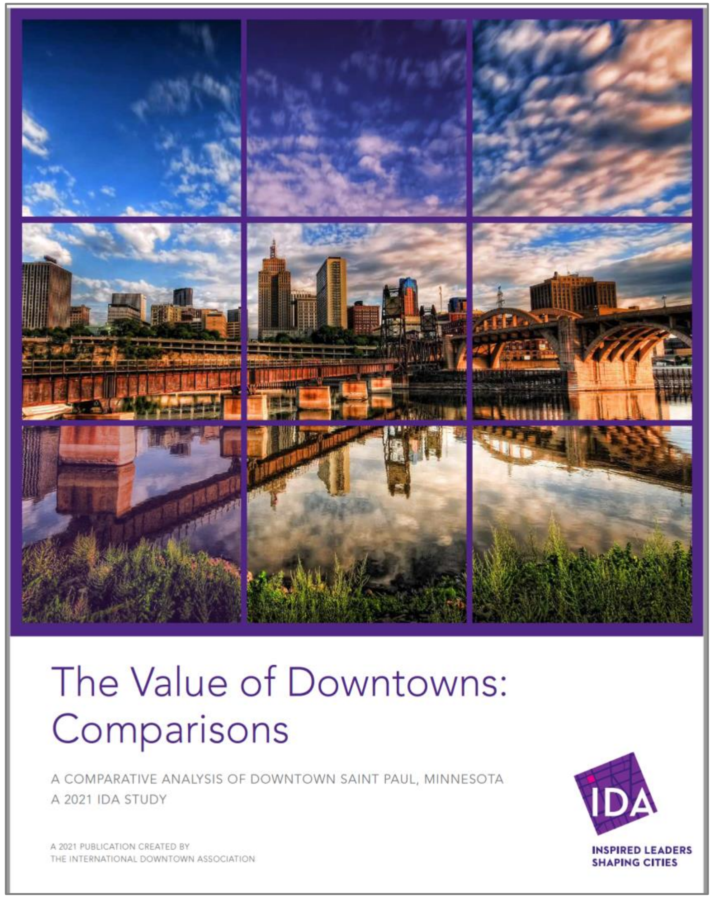
Downtown Saint Paul is **poised for stronger growth** with lower vacancies and new development projects in the pipeline.

Younger, more educated residents have led downtown growth

Downtown's become **more vibrant attracting both residents and employers** looking to locate somewhere active and special.

Downtown is inclusive, with a demographic breakdown doesn't skew toward a single race or income bracket any more than anywhere else in the city or region.

Downtown is **a competitively priced market** for commercial space and housing in a thriving region.







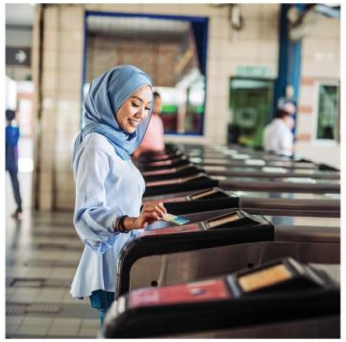





INSPIRED LEADERS
SHAPING CITIES

Shaping Cities for the Future

1. **Lead Downtown Messaging and Serve As a Trusted Source**
2. **Make Public Space Adaptations Permanent**
3. **Recover with Equity At the Forefront**
4. **Facilitate the Return to the Office**
5. **Leverage This Crisis For the Next Decade of Transformation**



IDA

INSPIRED LEADERS
SHAPING CITIES

Thank You!

agora