

OKLAHOMA CITY MAPS PROJECTS

Metropolitan Area Projects

Economic Impact Study

25 Years of
Change Through
Public and Private
Investment

NOVEMBER 2019 | Executive Summary

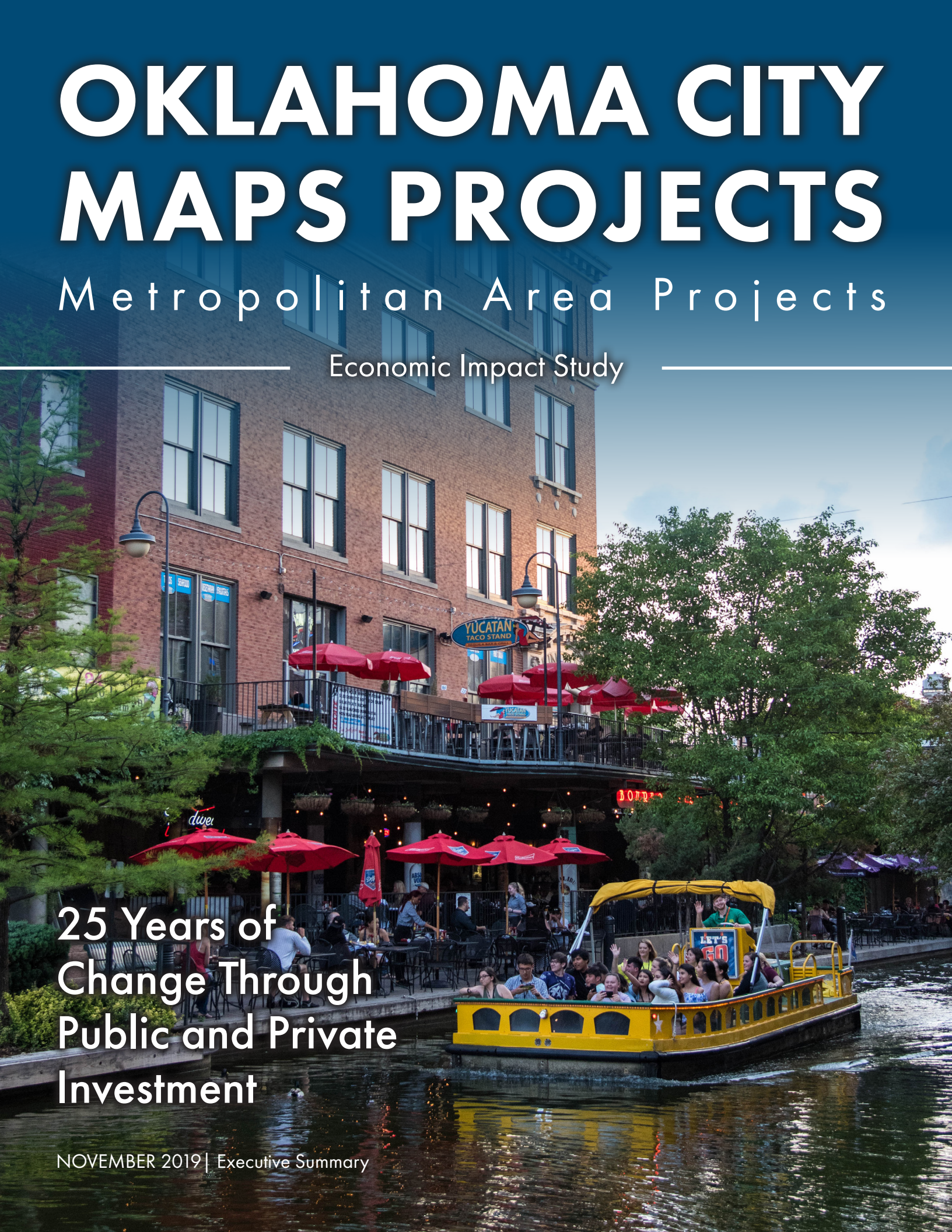


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About this study

Oklahoma City MAPS Projects: 25 Years of Change through Public and Private Investment was prepared by the Greater Oklahoma City Chamber and RegionTrack. This report extends the previous evaluation of the MAPS projects titled *Impact Analysis of Oklahoma City's MAPS and Other Significant Central City Investments* prepared by Larkin Warner and Eric Long. The initial release of the report in 2003 was followed by updates in both 2005 and 2009.

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I. MAPS Projects

Oklahoma City recently marked 25 years of public capital improvement projects funded through the MAPS initiatives. The MAPS projects addressed needs in transportation, education, recreation, entertainment, arts and culture, public space and lifestyle amenities.

In the 25 years since the onset of the initial MAPS projects, Oklahoma City and its residents have enjoyed a substantial improvement in the quality of life, particularly in the downtown area. The reconstruction of the area and the subsequent turnaround in the City's economic trajectory have been substantial and consistent, if not transformative.

The MAPS projects are viewed as the clear catalyst behind the revitalization underway in Oklahoma City. More importantly, these public investments in turn triggered significant private development in housing, lodging, retail, office space and recreational offerings. This report documents the activities of the MAPS projects and evaluates the resulting changes in the demographic, workforce, lifestyle and economic conditions enjoyed by residents of Oklahoma City.

Three Rounds of MAPS

All three rounds of MAPS projects (MAPS, MAPS for Kids, and MAPS 3) have contributed to the resurgence of downtown Oklahoma City and increasingly the broader metropolitan area. The initial MAPS projects established many of the civic landmarks now recognized as key components of commerce, government and civic life in Oklahoma City. The initial MAPS projects are now being integrated more deeply into the city's long-range plans for downtown through synergies with MAPS 3 projects.

MAPS for Kids played only an indirect role in the revival of downtown but represents a major step toward improving educational outcomes across the city's primary school district. MAPS for Kids was intended to serve as a catalyst in raising educational outcomes in the public schools by revitalizing an increasingly decaying educational infrastructure. The key contribution of MAPS for Kids to downtown is the construction of a new charter elementary school that fills a critical gap for families with young children who choose to live downtown.

Several MAPS 3 projects are now fully completed, and the extent of their future contribution is now being realized. Many of the MAPS 3 projects represent vital components of the city's plan for downtown revitalization that were envisioned in the early 1990s. The increased focus of MAPS 3 on lifestyle amenities such as Scissortail Park, wellness centers and biking trails underscores the range of items beyond traditional infrastructure that characterize today's great cities in which to live and work.

Prior Evaluations

Because of the key role played by public funding and the substantial financial commitment of taxpayers in the region, ongoing evaluation of the outcome of the MAPS projects is fundamental to public oversight. This report extends the most recent evaluation of the MAPS projects titled *Impact Analysis of Oklahoma City's MAPS and Other Significant Central City Investments* prepared by Larkin Warner and Eric Long. The initial release of the report in 2003 was followed by updates in both 2005 and 2009.

The 2009 MAPS report focused primarily on the influence of the initial round of MAPS projects and accompanying private investment activity in the downtown Oklahoma City area. The report also

discussed the early stages of planning and implementation of the MAPS for Kids projects underway at the time. This report extends the 2009 report by updating outcomes for the early MAPS projects and providing an initial examination of the more recent MAPS efforts. The time frame of the report focuses primarily on the period since 2009, which captures the era of the MAPS 3 initiative.

Measuring Change

Since the release of the 2009 report nearly a decade ago, much has changed surrounding both the MAPS projects and the resulting development of Oklahoma City, particularly in downtown. The original MAPS projects continue to mature, MAPS for Kids projects are now largely completed, and a significant round of projects approved under the MAPS 3 initiative are completed or underway.

The overall results suggest that the initial public investment in MAPS triggered substantial additional public and private sector investment. To date, approximately \$1.8 billion in city investment has been used or earmarked for the three rounds of MAPS projects in Oklahoma City. Additional city infrastructure expenditures in the period totaled \$690 million and worked to enhance the outcome of the MAPS projects. Other federal, state and local government entities invested an additional \$600 million in the downtown area. Total public investment through city spending on MAPS and investments by other public sector entities reached \$3.1 billion between 1995 and 2018.

Private investment spending in the downtown study area similarly surged along with the initial MAPS projects and continued steadily through 2018. Estimated private investment spending totaled \$3.9 billion between 1995 and 2018. Private investment gains are highly visible in the office, hotel, medical and research, residential, food service and entertainment sectors.

In total, the combination of city investment through MAPS along with other public and private sector investment in the downtown study area reached an estimated \$7 billion in the full MAPS era.

Report Objective and Structure

In assessing the various changes resulting from MAPS, this evaluation pursues three basic underlying tasks:

1. Update the prior evaluation of the original MAPS projects provided in the 2009 report, particularly the contribution of MAPS to change in downtown Oklahoma City
2. Provide an initial review of the mostly completed MAPS for Kids projects
3. Detail the completed or currently underway MAPS 3 initiatives and the role these projects are expected to play in shaping future growth in Oklahoma City

A final, though more informal, task pursued throughout the report is the development of a more integrated view of the three rounds of MAPS projects approved to date. The number and breadth of projects and the length of time over which they have transpired warrants a more comprehensive view of MAPS as a single, ongoing economic development effort that now extends 25 years.

Downtown Revitalization

A key aspect of the report is measuring change in the downtown area where most MAPS projects are located. When MAPS was first proposed in the early 1990s, no catalyst capable of propelling economic renewal in downtown Oklahoma City was visible. Downtown had settled into stagnation and then entered decline in the decade following the Oil Bust of the early 1980s.

Downtown's condition reflected decades of insufficient public and private investment. Private housing, retail and office development had moved mostly outside the city's central core into other more vibrant markets across the city.

In reversing the trend in place, the MAPS initiatives pursued the increasingly important economic development strategy of *placemaking*, or the process of developing a city in which residents want to live, work and play. This approach acts as both a retention mechanism for current businesses and residents while attracting others from outside the region. The objective for downtown called for the weaving together of an expanded business and employment presence, a vibrant residential community, expanded retail and services options, medical and education facilities and a range of cultural, recreational and entertainment venues.

MAPS Projects - Structure and Status

The MAPS initiatives remain highly innovative in terms of both structure and process. Some of the key characteristics of the MAPS projects include:

1. Public inception: Projects are initiated through a public input process
2. Public vetting process: City Council reviews and makes project recommendations
3. Voter approval: Projects are approved through a majority vote of the people
4. Direct funding: Funded through a temporary dedicated local sales tax
5. Pay-as-you-go: Projects begin only after funds are collected
6. City managed: Direct project operations are managed by City staff
7. Debt-free: Projects carry no debt upon completion
8. Public oversight: Continual public oversight by volunteer committees of private citizens

These elements continue to serve the MAPS process well.

The three rounds of MAPS projects approved by voters to date represent widespread improvements in city infrastructure. An overview of the composition, cost and status of the three major MAPS initiatives is provided below. A more detailed description of each MAPS initiative is provided in Appendix 1.

MAPS (Metropolitan Area Projects)

Downtown revitalization and civic arts/entertainment venues

- The original MAPS projects were approved on Dec. 14, 1993, by 54 percent of voters.
- The initial \$350 million sales tax-funded program focused primarily on revitalization of the core downtown area.
- Projects included construction of the Chickasaw Bricktown Ballpark, construction of the Bricktown Canal, renovation and expansion of the Cox Convention Center, construction of Chesapeake Arena, renovation of the Civic Center Music Hall, creation of the Oklahoma River system, construction of the Ron J. Norick Downtown Library, improvements at State Fair Park and a rubber-tire trolley system for transportation to/from downtown and the surrounding area.
- The final MAPS project was completed in 2004.
- All the original MAPS projects except the trolley system remain in place.
- MAPS projects are now recognized as key downtown landmarks and important civic, arts and entertainment destinations.

MAPS for Kids

Revitalization of public school infrastructure

- Voters approved funding for MAPS for Kids on Nov. 13, 2001, with a 61 percent majority.
- The \$694 million initiative was intended to provide a comprehensive overhaul and restructuring of the aging public education infrastructure in Oklahoma City.
- Funding included \$514 million in city sales tax and a \$180 million bond issue.
- \$154 million of the funding was split among 23 suburban school districts serving children living within the Oklahoma City limits but attending school outside the Oklahoma City Public School District.

- The proposal called for the closure of unneeded school buildings, construction of new schools, and at least \$1 million in deferred maintenance and other renovations at every other district school.
- A key goal of the effort was to reduce the number of buildings operated by the district from 88 to 70. There are currently 64 structures operated by the district after the district's Pathway to Greatness project further streamlined the number of buildings.
- Six new school buildings were constructed, including a new downtown elementary school.
- Nearly all MAPS for Kids projects were completed by 2018.

MAPS 3

Downtown infrastructure development and health/recreation venues

- The MAPS 3 initiative was approved by voters on Dec. 8, 2009, with a 54 percent majority.
- Funding for the \$777 million campaign was derived from the dedicated MAPS sales tax.
- MAPS 3 centered on major downtown capital projects but also included trails, sidewalks, and senior health and wellness centers located throughout the city.
- The largest MAPS 3 projects—Convention Center, Scissortail Park and the OKC Streetcar system—are already transforming the Core-to-Shore development area downtown.
- Two wellness centers, the streetcar, the Bennett Event Center at State Fair Park and the RIVERSPORT Rapids whitewater rafting and kayaking center are completed. The trails are nearing completion, and two more wellness centers are in the planning stages.
- All currently active MAPS 3 projects are scheduled for completion by 2021. A summary of the status of all MAPS 3 projects is provided in Figure 1.

Figure 1. MAPS 3 Projects – Summary

Type	Project	Cost	Status
Convention Center	Downtown Convention Center	\$288.0 million	Underway
City Park	Scissortail Park (Downtown)	\$132.0 million	Underway
Streetcar	Downtown Streetcar	\$131.0 million	Completed in 2018
State Fair Event Center	Bennett Event Center	\$58.7 million	Completed in 2017
River Rapids	RIVERSPORT Rapids	\$57.0 million	Completed in 2016
Wellness Centers	Senior Health & Wellness Centers	\$52.0 million	Two completed, two underway
Trails	Trail System	\$39.5 million	Mostly completed
Sidewalks	Sidewalk Construction/Repair	\$18.1 million	Underway
Total – MAPS 3		\$777 million	

Source: City of Oklahoma City and Greater Oklahoma City Chamber

Other Related City Development Efforts

Along with the three MAPS initiatives, Oklahoma City has engaged in other major non-MAPS investments focused on improving city infrastructure and quality of life for residents in the MAPS era. These efforts have worked to enhance the outcome of MAPS and include the following:

2007 Bond Program

In 2007, Oklahoma City voters approved a 10-year series of annual bond issues totaling \$835.5 million to improve or replace city infrastructure. Projects include the repair of 750 miles of residential and arterial streets, bridge repair, park improvement, drainage system improvement, sidewalk and trail construction, new police and fire stations, bus replacement and public library updates. The bond program also provided \$75 million for an incentive fund for economic development.

I-40 Realignment

The relocation of I-40 to replace the old elevated Crosstown Expressway Bridge dramatically altered much of the landscape just south of downtown Oklahoma City. Following the I-40 realignment, the city created the iconic Skydance Pedestrian Bridge spanning a stretch of the new interstate south of downtown. The bridge was intended to break the development barrier presented by the interstate and allow foot traffic to easily move across the busy I-40 corridor between downtown and the river. The \$688 million project also opened a considerable stretch of developable land along the path of the original bridge on the south edge of downtown.

Core to Shore

The city's Core-to-Shore project was implemented in 2008 to reconstruct the south entrance to downtown and build a corridor stretching from the city center to the revitalized Oklahoma River to the south. Another important component of the Core-to-Shore plan called for the creation of a new urban corridor using land opened by the I-40 realignment to create a new entrance to the city on the south side of downtown. The Oklahoma City Boulevard is now complete and development along the new route is brisk.

Project 180

In 2009, the city embarked on an eight-phase \$176 million project for the redesign of downtown streets, sidewalks, parks and plazas to improve appearance and make the central core more pedestrian friendly. Plans called for the addition of landscaping, public art, marked bike lanes, decorative street lighting and additional on-street parking spaces.

Better Streets, Safer City

Approved on Sept. 12, 2017, by Oklahoma City residents, the Better Streets, Safer City initiative temporarily extended the MAPS 3 1-cent sales tax for an additional 27 months (through March 2020) to generate \$240 million for infrastructure. Initiatives include \$168 million for street resurfacing, \$24 million for streetscapes, \$24 million for sidewalks, \$12 million for trails, and \$12 million for bicycle infrastructure. The vote included approval of a 10-year series of bond issues totaling \$967 million to invest in streets, police and fire facilities, parks, and other basic infrastructure needs. The final component is a permanent 1/4-cent sales tax rate increase to support increased public safety. The tax will generate an estimated \$26 million annually to the general fund.

MAPS 4

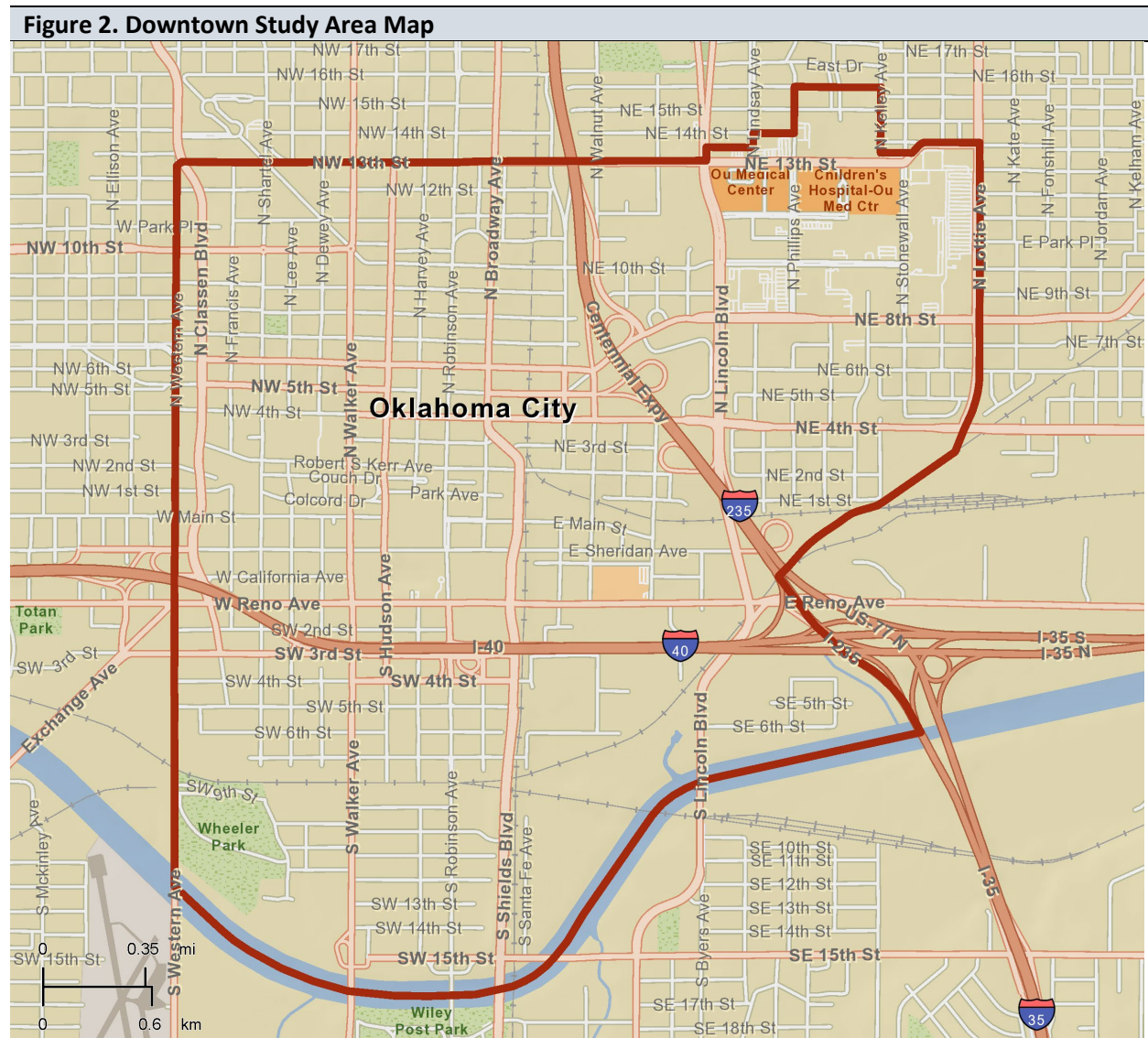
In October 2018, Mayor David Holt and the Oklahoma City Council announced efforts to collect ideas from the public for potential MAPS 4 projects. Mayor Holt and councilmembers heard presentations for potential MAPS 4 projects during a series of special meetings in July and August 2019. The slate of projects were approved by City Council and the vote was called for Dec. 10, 2019. The strategy remains the identification of transformational ideas that continue the momentum from prior MAPS programs and propel the city forward.

II. Downtown Study Area – Demographic Profile

Because many of the MAPS projects to date focus on revitalization and development of downtown, the report seeks to evaluate demographic and economic changes in the downtown market area. Downtown has undergone significant change since the onset of the initial MAPS programs and is currently experiencing accelerated development traced to MAPS 3.

Downtown Study Area

Figure 2 illustrates the general downtown market area encompassing most of the MAPS spending. This defined region is commonly used by both the city and related entities to describe the current footprint of the broader downtown Oklahoma City market. The study area captures the location of most downtown MAPS spending as well as other major public spending initiatives targeted at the downtown market. The 4.41 square mile area is generally bordered by Western Avenue to the west, 13th Street to the north, I-35/235 and Lottie Avenue to the east, and the Oklahoma River to the south

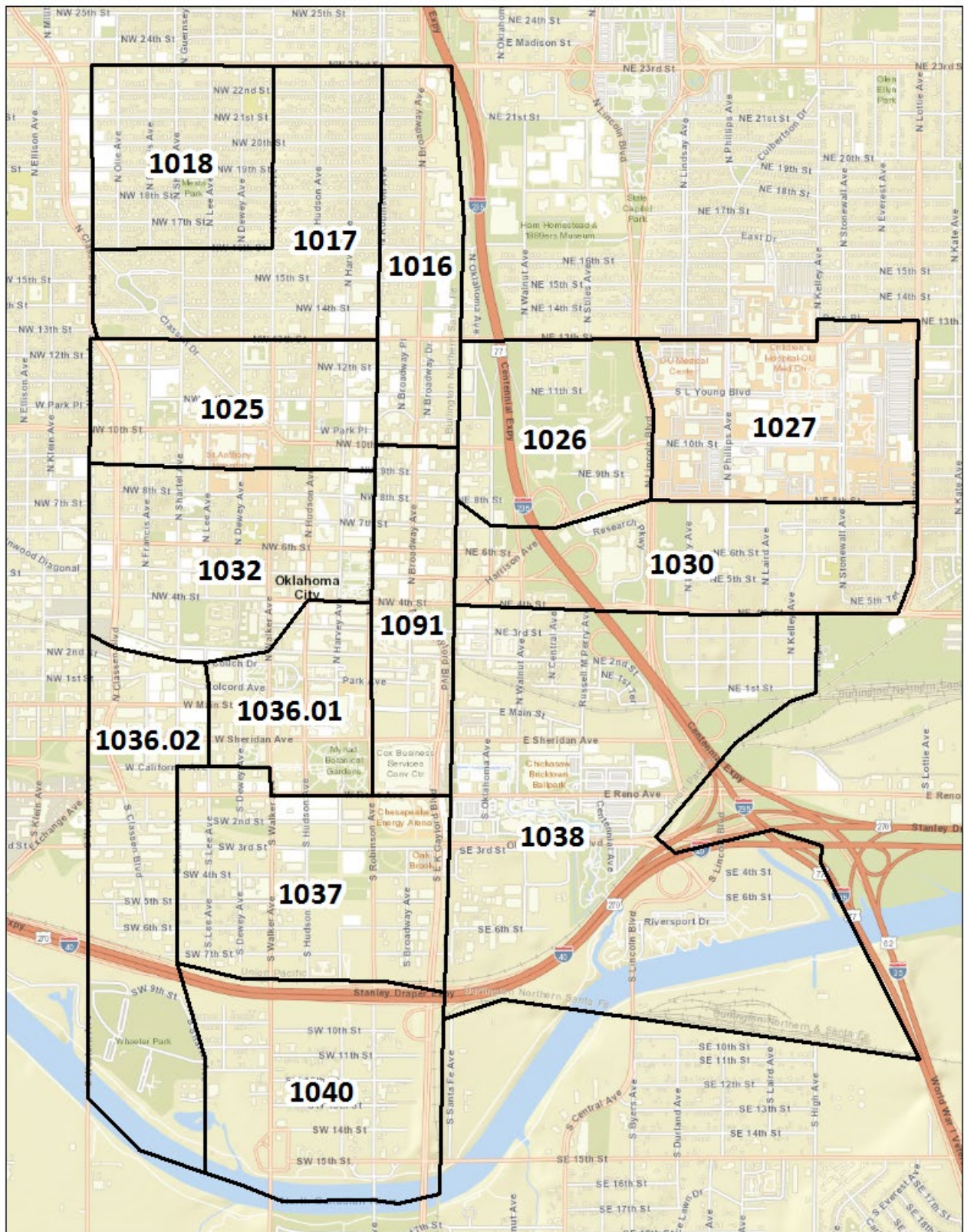


Source: Greater Oklahoma City Chamber

Public databases of economic and demographic data do not generally correspond to the exact boundaries of the downtown market area shown in Figure 2. Activity in the downtown study area is evaluated throughout the report using combinations of census tracts and ZIP codes to provide approximate coverage of the downtown area. The report uses both the 14 census tracts (see Figures 3a and 3b) and the four primary downtown ZIP codes – 73102, 73103, 73104, and 73106 – to evaluate changes in demographic and economic conditions in the study area.

Figure 3a. Downtown Study Area Census Tract Boundaries

Census Tract	Approximate Boundaries (North to South, West to East)	Approximate Location in Study Area N/S by E/W (North-N, South-S, Central-C, East-E, West-W)	Selected Features
1016	NW 23rd to NW 10th between Robinson and Santa Fe	NW	Mixed use, Byron's Liquor Warehouse, Aberdeen Properties
1017	(L-shaped) NW 23rd to NW 13th between Walker and Robinson; NW 16th to NW 13th between Western and Walker	NW	Heritage Hills
1018	NW 23rd to NW 16th between Western and Walker	NW	Mesta Park
1025	NW 13th to NW 9th between Western and Robinson	CW	St. Anthony Hospital, Bone & Joint Hospital
1026	NE 13th to NE 8th between Santa Fe and Lincoln	CC	Oklahoma School of Science and Mathematics, Oklahoma Department of Commerce
1027	NE 13th to NE 8th between Lincoln and Lottie	CE	North part of Oklahoma Health Center; University of Oklahoma Health Sciences
1030	NE 8th to NE 4th between Santa Fe and N. Lottie	CE	South part of Oklahoma Health Center, Presbyterian Health Foundation Research Park
1091 (Formerly 1031.01 & 1031.02)	NW 10th to Reno between Robinson and Santa Fe	CC	Automobile Alley and Downtown including Cox Convention Center
1032	NW 9th St. to Couch Drive/4th between N Western and N Robinson	CW	Central-west downtown including National Memorial, Sycamore Square, new Federal campus, County Jail, and Regency Tower
1036.01	NW 4th to Reno along N Robinson (eastern edge) and Robert S. Kerr to California along Lee (western edge)	SC	Downtown including Myriad Gardens, City and County offices, Civic Center
1036.02	NW 2nd Street and Couch Drive to Oklahoma River between N Western and Lee/Shartel	SW	Police Department and Municipal Courts, Wheeler Park
1037	California and Reno to SW 8th between Shartel and Santa Fe, north of new I-40	SC	Empty former Main Post Office; Union Station, OKC Boulevard, north Scissortail Park
1038	NE 4th to Union Pacific tracks between Santa Fe and I-35 ramp	SE	Bricktown and Deep Deuce
1040	I-40 to Oklahoma River between Shartel and Shields/Santa Fe	SC	South Scissortail Park to Oklahoma River

Figure 3b. Downtown Study Area – Census Tract Map

Source: Greater Oklahoma City Chamber

Demographic Structure and Change

The focus of the MAPS projects on placemaking was expected to establish the foundation for a vibrant downtown area where residents can live, work and play within the central core of the city. In turn, these changes were expected to introduce substantial change in the demographic makeup of the downtown area.

Since about 2009, marked acceleration has taken place downtown in population and housing market growth. The area's residents are also becoming younger, more educated, higher earning and more racially diverse. The full report provides a detailed evaluation of the changing demographic structure of the downtown study area and evaluates changes since the 2009 report. Key findings from the report include:

Population

Population growth in the downtown study area accelerated in 2010 following decades of relatively weak gains.

- Total population in the study area increased 20.8 percent between 2010 and 2017, adding nearly 2,200 new residents.
- Adjusted for residents living in group quarters, population in the study area increased by more than 1,000 new residents (14.9 percent gain) between 2010 and 2017.

Population growth in the downtown study area is now far outpacing the broader region.

- The 20.8 percent gain in the study area since 2010 is more than double the 7.7 percent gain countywide and four-fold the 4.6 percent gain statewide in the period.
- Adjusted for residents in group quarters, the 14.9 percent study area gain is roughly twice the rate of county population growth (7.7 percent) and more than triple the state gain (4.6 percent).

The downtown area is steadily moving toward a critical mass of residents.

- Total population in the downtown study area reached a reported 12,603 residents in 2017.
- After adjusting for residents living in group quarters, an estimated 7,808 persons not in group quarters now reside in the downtown study area.

Housing

Along with population, housing growth in the downtown area accelerated beginning in 2010.

- County assessment data suggest that approximately 2,700 housing units were added in the downtown study area between tax years 2009 and 2017, a 55.3 percent gain in the period.
- Three-fourths of new downtown residential units added since 2009 are found near SSM Health St. Anthony Hospital (1,052 units) and in the Bricktown/Deep Deuce area (1,006 units).
- A total of 7,635 housing units are reported in the downtown study area in tax year 2017.

The downtown housing market remains heavily rental, with vacancy rates falling over time.

- Currently, approximately only one-fourth (23 percent) of total housing units in the study area are owner occupied. Almost 60 percent are occupied by renters, with 18 percent vacant.

- Vacancies as a share of total units trended down sharply between 1990 and 2000 but have remained at approximately 18-19 percent of total units since 2000.

Rents remain low relative to many central cities but have risen sharply in key downtown census tracts.

- Median monthly rents in the downtown study area remain relatively low at \$947 in 2017.
- Median monthly rents vary widely, ranging as high as \$2,000 in tract 1030 (south of University of Oklahoma Health Sciences Center) and as low as \$575 in tract 1026 (near the Oklahoma Department of Commerce).

Owner-occupied housing represents a declining share of the downtown market, but valuations are rising sharply in key census tracts.

- Median values for owner occupied homes are highest in tracts 1017 (Heritage Hills, \$427,600) and 1018 (Mesta Park, \$296,200) to the north and tract 1038 (Bricktown and Deep Deuce, \$423,800) to the southeast.
- Median home values remain the lowest in tracts 1030 (south of University of Oklahoma Health Sciences Center, \$104,800), 1032 (near the Oklahoma City National Memorial & Museum and Oklahoma County Jail, \$119,500), and 1016 (far north, \$143,100).

A significant share of the city's early legacy housing stock remains in place in the study area.

- Housing units added in the study area between 2010 and 2017 now represent an estimated 11 percent of total housing units.
- Approximately 27 percent of housing units in the downtown study area were constructed since 2000 when the initial MAPS projects opened.
- Legacy housing remains important downtown, with 42 percent of study area units constructed prior to 1950 and 38 percent built in 1939 or earlier.

Demographic Profile:

The population of the downtown study area remains relatively young and the median age is falling.

- Residents living in the study area have a median age of 34.0 years in 2017. This compares to 34.4 years for the county, 36.3 years for the state and 37.8 years nationally.
- The median age of residents in the study has declined slightly from 34.3 years in 2010.
- The low overall age dependency ratio of the study area suggests the area is home to few residents outside the traditional working ages relative to the broader region.

Declining school enrollment in the study area reversed along with population beginning in 2010.

- Total school enrollment among downtown residents in 2017 is down slightly from a high of approximately 2,000 students in 2000 but has rebounded by almost 225 students since 2010.
- The largest gains in enrollment since 2010 are among elementary, secondary and college students residing in the study area.
- More than 800 residents in the downtown study area are enrolled in college or graduate school.

The study-area population is far more racially diverse than the surrounding region.

- Almost two-thirds (63.7 percent) of the study area population identified as white (non-Hispanic) in 2017, far lower than the 68.9 percent share in Oklahoma County and the 72.9 percent share statewide.
- Approximately 20 percent of residents identified as black or African American (non-Hispanic), well above the 15.0 percent share at the county level and the 7.3 percent share statewide.
- A reported 4.4 percent identify as American Indian or Alaska Native reflecting the high share of American Indians residing in Oklahoma.
- The Asian (non-Hispanic) share of population reached only 3.5 percent in 2017 with the highest numbers of Asian residents in the northern areas of downtown (tracts 1017 and 1018) between 13th and 23rd bordered by Western and Robinson.
- Residents reporting as Hispanic or Latino (but of any race) comprise only 7.3 percent of the study area population in 2017. This is far lower than the 16.4 percent Hispanic share in Oklahoma County and slightly below the statewide share of 9.8 percent.
- The study-area residents reporting as two or more races is 6.4 percent, slightly below the statewide share of 6.8 percent but slightly above the countywide share of 5.4 percent in 2017.

The average level of education in the downtown study area is relatively high but is highly variable across census tracts.

- Study-area residents have an average of 13.8 years of schooling in 2017, or an average of 1.8 years of education beyond high school.
- Education levels are far higher in the three northernmost highly residential census tracts (1016, 1017 and 1018), with 68 percent of residents having completed a bachelor's degree or higher.
- Among the southern tracts, the highest levels of attainment are found in the Business District (15.3 years of schooling) and Bricktown/Deep Deuce (16.3 years of schooling), both with residents having roughly a college degree on average.
- The lowest educational attainment levels are found in tract 1037 to the southwest of downtown (11.6 years of schooling) and tract 1040 (11.4 years of schooling) south of I-40 to the Oklahoma River. Residents in both tracts have completed slightly less than a high school diploma on average with few completing a bachelor's degree or higher.

Median household income in the downtown study area is relatively high compared to the county, state and nation.

- Median household income in the study area reached \$59,605 in 2017, 17 percent above the county median of \$50,762 and 20 percent above the statewide median of \$49,767 in the period.
- Median household income in the study area is also 3.4 percent above the U.S. median of \$57,652 in 2017.
- Across all downtown tracts, 29 percent of households report income of \$100,000 or more, while four tracts report no households with income above \$100,000.
- Average income (\$90,907) is far above the median income for the study area (\$59,605), suggesting a significant concentration of very high earning households in the study area.

- There is significant income diversity in many of the tracts in the study area that have a relatively high share of households with income both above \$100,000 and below \$25,000.

The disability share in the study area is above both the national (12.6 percent) and county (13.6 percent) shares but falls below the state share (15.9 percent).

- More than 80 percent of residents with a disability are between the ages of 18 and 64.
- Younger residents under the age of 18 and older residents ages 65 and over both comprise a relatively small share of total residents reporting a disability.

The downtown study area has a very high share of management, business, science and arts occupations relative to the county, state and nation.

- Much of the difference in occupational mix relative to the county, state and nation is traced to just two occupations – management and health care.
- Management occupations reflect a high number of white-collar managerial jobs across most industries located downtown.
- Health care occupations are traced to the presence of SSM Health St. Anthony Hospital, OU Medical Center and the University Research Park in the study area.
- The overweighting of jobs in management, business, science and arts occupations results in far lower shares of occupations in the remaining four major occupation groupings.
- In comparison, both the county and state closely match the overall national occupational mix for most major and detailed occupation groups.

III. Downtown Study Area - Economic Profile

Along with accelerated growth in population and housing, another key spillover effect anticipated from MAPS is growth in the base of business establishments and employment downtown. Many of the city's largest employers have a significant presence downtown and attract workers from all regions of the metropolitan area.

Much like population and other demographic measures, the results suggest a sharp increase in employment and business activity in the downtown study area since approximately 2009. Activity in the study area has also far outpaced the county, metro area and state in the period.

The full report provides a detailed examination of recent changes in the size and composition of the local economy in the downtown study area. Key findings on changes in the downtown study area economy include the following:

Employment

Much like recent population gains, a distinct acceleration in downtown job growth has taken place since approximately 2009.

- Total jobs located in the 14 census tracts in the downtown study area reached 61,100 in 2015, the most recent year of data available.
- More than 9,000 jobs were added in the study area between 2009 and 2015, a 17.3 percent gain. This follows an extended period of relatively flat and volatile job growth from 2002 to 2009.
- The study area far outpaced job growth at the county (12.4 percent), metro (12.5 percent) and state (8.0 percent) levels in the period.
- Measured instead across the four major downtown zip codes, more than 8,800 jobs were added between 2009 and 2016, a 22 percent gain in the period.
- Total jobs in the four primary downtown zip codes surged to more than 48,700 in 2016.
- Job growth in the study area zip codes also far exceeds the reported 5.4 percent gain statewide, 7.7 percent gain countywide, and 7.6 percent gain for the metropolitan area in the 2009 to 2016 period using comparable measures.

Most new workers in the study area since 2009 commute to downtown from outside the relatively small downtown study area.

- In 2015, more than 59,500 (97.4 percent) of the 61,100 jobs downtown were held by persons who live outside the study area.
- Since 2009, more than 8,500 of the approximately 9,000 new downtown jobs were filled by residents living outside the immediate downtown study area.

However, most new jobs in the downtown study area since 2009 were filled by workers who live in Oklahoma County.

- Two-thirds (5,999) of the 9,009 net new jobs downtown were filled by residents living in Oklahoma County.

- The total number of Oklahoma County residents working in the study area increased 20.4 percent in the period to a total of 35,432, exceeding the overall downtown job gain of 17.3 percent in the period.
- Neighboring counties supplied the remaining one-third of workers in the period, a reflection of the continued broad distribution of labor across the region.
- Residents of both Cleveland and Canadian counties gained about 1,000 downtown jobs each in the period.

Despite large and growing numbers of in-commuters to downtown, growth in employment of residents who live in the study area has been even stronger.

- Measured from the recent bottom in 2010, employment among study area residents regardless of where they work increased 26.8 percent through 2015, or a total of 5,280 workers.

Jobs in the downtown study area remain highly concentrated in four sectors - health care, education (primarily medical), public administration (city, state and federal government) and mining.

- These four sectors represent the traditional areas of employment concentration downtown.
- These sectors are anticipated to remain anchors in the area in the near- to intermediate-term.
- In the longer-term, however, industry diversification could begin to introduce significant change to the current industry structure downtown.

The growth rate for downtown jobs has been larger and more persistent for residents who live in the study area versus commuters coming from outside downtown.

- Total jobs in downtown held by downtown residents were at a recent bottom of 1,006 in 2010 and increased by 600 to just above 1,600 by 2015, a 59 percent gain in the period.
- Though the absolute numbers are smaller than for commuters, job growth rates are far higher for downtown residents and suggest an important shift in the labor supply of the region.

Recent growth in the number of workers who both live and work downtown is found almost exclusively among workers in the highest wage category.

- Based on monthly earnings in three income ranges (\$1,250 or less, \$1,251 to \$3,333, and more than \$3,333), the number of workers in the highest wage category has increased steadily from about 400 in 2007 to 944 in 2015, a more than doubling in the period.
- In contrast, while a significant share of downtown residents is employed in lower-paying jobs located downtown, the number has remained flat or fallen slightly since 2002.

ZIP code-based employment estimates for the study area similarly suggest a surge in downtown hiring in recent years following an extended period of relatively stagnant business activity.

- Following little net hiring growth in the study area from the Oil Bust in the early 1980s through the late 2000s, more than 8,800 jobs were added in the downtown study area ZIP codes between 2009 and 2016, a 22 percent gain in the period.
- Total jobs in the four primary downtown ZIP codes surged to more than 48,716 in 2016.

Payroll at firms operating in the four primary ZIP codes similarly accelerated beginning in 2009.

- Total annual payroll increased from \$2.2 billion in 2009 to more than \$3.4 billion in 2016 – a 57 percent increase.
- Downtown far outpaced payroll gains across the broader region.
- The 57 percent gain downtown was more than double the 26.4 percent gain statewide, 27.8 percent gain countywide, and 26.8 percent gain in the metropolitan area in the period.

Recent downtown payroll gains far exceed historical gains.

- Total payroll growth from 1995 to 2009 averaged 4.2 percent annually versus acceleration to 6.8 percent annually between 2009 and 2016.
- Some sluggishness is present in 2016 relative to 2015 but reflects the statewide oil and gas slowdown in the period.

Payroll gains in the study area are more than double the pace of reported employment gains in the period, suggesting rising pay per worker in the study area since 2009.

- Average payroll per worker increased from \$54,600 in 2009 to \$70,200 in 2016, a 29 percent gain in the period.
- For comparison, average pay per worker in the study area (\$70,200) now far exceeds payroll per worker at the state (\$42,042), county (\$46,042), and metro (\$43,061) levels.
- The annual pay premium per downtown area job is now 67 percent relative to the state, 52 percent relative to the county and 63 percent relative to the metropolitan area.

Business establishment growth in the U.S. and in many states has been sluggish for more than two decades but resumed growth in the downtown study area since 2012.

- The downtown study area added 250 net new establishments (13 percent gain) from 2012 through 2016, the most recent data reported.
- The rate of establishment growth in the study area is more than double the rate in the period for the county (5.0 percent), metro area (5.3 percent), state (2.5 percent), and nation (4.4 percent).
- A reported total of 2,200 business establishments were operating in the study area in 2016.

The average size of business establishments in the downtown study area continues to increase.

- The number of workers per establishment has increased steadily since reaching a recent low in 2010, rising from about 20.3 to 22.1 workers per establishment through 2016.
- The average size of a business establishment in the study area measured by total payroll is similarly increasing. The average firm increased its payroll from \$1.1 million in 2009 to approximately \$1.6 million annually in 2016, a 40 percent gain in the period.

IV. MAPS Investment – Public and Private

Large-scale local public infrastructure projects like MAPS are typically accomplished only through state and local government coordination and funding. The public backing of the large public investment through MAPS was intended as a signal to private investors and developers that significant steps were being taken toward revitalizing downtown Oklahoma City.

Along with changing demographics and a rebounding downtown economy, MAPS was expected to induce a rebound in private investment in housing, office, retail and other development. The 2009 evaluation of MAPS documented significant new private and public investment in the downtown study area tied to the onset of MAPS.

Findings in the current report indicate continued strength in both private and public investment downtown. Both the housing and office markets are benefiting from continued investment and rising overall property values. Existing properties tracked over time in Bricktown show steady and substantial valuation gains since the initial MAPS projects were opened.

Public Investment–MAPS, MAPS for Kids, MAPS 3

Figure 4 provides an overview of the \$1.81 billion in total public investment across all three major MAPS initiatives the past 25 years. The three rounds of MAPS are progressively larger in size as measured by actual cost. The original \$350 million MAPS program accounts for slightly less than 20 percent of total investment. Both MAPS for Kids (\$684 million) and MAPS 3 (\$777 million) have approximately twice the public investment of the original MAPS projects, comprising 38 percent and 43 percent, respectively, of total public investment.

Figure 4. MAPS Projects – Total Public Investment				
Project	Actual Cost		Inflation-Adjusted Cost (2018)	
	Project Cost (millions)	Share of Total	Project Cost (millions)	Share Of Total
MAPS	\$350.0	19.3%	\$569.2	24.6%
MAPS for Kids	684.0	37.8%	902.8	39.0%
MAPS 3	777.0	42.9%	843.6	36.4%
Total	\$1,811.0	100.0%	\$2,315.6	100.0%

Source: City of Oklahoma City, Greater Oklahoma City Chamber, and Bureau of Labor Statistics

Notes: Cost is inflation-adjusted using the approximate midpoint at which sales tax revenue for each MAPS project was received. MAPS projects are adjusted using a midpoint of March 1996; MAPS for Kids uses a midpoint of January 2005; and MAPS 3 uses a midpoint of July 2013. Inflation adjustments are made using the all urban consumer price index-U.S. city average.

Inflation Adjusted Investment

To account for the effects of inflation over the 25-year life of the MAPS projects, Figure 4 provides an estimate of the inflation-adjusted cost of the three rounds of MAPS projects in 2018 dollars. The total inflation-adjusted cost across the three MAPS initiatives is approximately \$2.32 billion in 2018 dollars, or an inflation differential of 28 percent above initial cost.

The relative share of total cost devoted to the three MAPS initiatives also shifts after inflation adjustment. The initial MAPS projects now comprise about 25 percent of the total at \$569 million in

2018 dollars. MAPS for Kids retains the same approximate share of the total cost (39 percent) with an inflation-adjusted cost of \$903 million. MAPS 3 is no longer the largest of the three initiatives after inflation-adjustment, dropping to 36 percent of total cost at \$844 million in 2018 dollars.

Total Public and Private Investment

Along with city investments through MAPS, increased investment is traced to both the private sector and other public sector entities at the federal, state and local government levels. Total investment includes all city spending on the three rounds of MAPS projects plus other investment (both public and private) in the downtown study area.

Estimates of total investment for the downtown study area are detailed in Figure 5. Estimates from the 2009 MAPS report covering the 1995 to 2008 period are combined with more recent estimates for the 2009 to 2018 period. Estimates of public investment are divided into those made by the city versus those made by other public sector entities. City investment is further split into MAPS and non-MAPS components. Private investment is categorized across nine major groupings of development.

Figure 5. Public and Private Investment - MAPS & Downtown Study Area				
	Investment (millions)			% Share
	1995-2008	2009-2018	Total	
Public				
City of OKC - MAPS	\$356.1	\$1,461.0	\$1,817.1	26.1%
Non-MAPS	56.5	633.4	689.9	9.9%
Total City of OKC	\$412.6	\$2,094.4	\$2,507.0	36.0%
Other Public (Federal, State, & Local)	548.7	48.9	597.6	8.6%
Total Public	\$961.3	\$2,143.3	\$3,104.6	44.6%
Private				
Medical & Research	1,288.1	275.7	1,563.8	22.4%
Office	249.2	759.7	1,008.9	14.5%
Hotel	190.4	285.0	475.4	6.8%
Residential	237.5	174.9	412.4	5.9%
Entertainment/Cultural	154.0	108.5	262.5	3.8%
Food Service	24.8	36.9	61.7	0.9%
Retail	22.1	28.2	50.3	0.7%
Parking	6.5	8.5	15.0	0.2%
Other	8.0	3.7	11.7	0.2%
Total Private	\$2,180.6	\$1,681.0	\$3,861.6	55.4%
Total Public and Private	\$3,141.9	\$3,824.3	\$6,966.2	100.0%

Note: The two time periods of investment displayed in Figure 5 are not of equal time span and are based upon the update schedule of current and past MAPS evaluation reports. The 1995-2008 period captures investment over a 14-year period, while the 2009-2018 period captures only approximately 10 years.

Source: City of Oklahoma City, Greater Oklahoma City Chamber of Commerce, McGraw Hill Dodge Reports, and RegionTrack

Downtown Investment Activity – 1995 to 2008

Estimates from the 2009 MAPS report documented a significant increase in investment activity in the

downtown study area following the initial public investment in MAPS. A total of \$3.14 billion in total public and private investment was completed or in progress in downtown from 1995 to 2008.

Total public sector investment comprised less than one-third (30.7 percent) of total investment. City investment spending totaled \$413 million in the period, with \$356 million traced directly to the MAPS projects. The city engaged in an additional \$57 million in investment in the downtown study area. Other public sector entities invested heavily in the downtown study area, with public projects valued at \$549 million completed in the early stages of MAPS. Non-city public investment comprised more than half (57 percent) of all public investment projects between 1995 and 2008.

Private investment of \$2.18 billion from 1995 to 2008 comprises nearly 70 percent of total investment and equates to roughly six times the amount of MAPS spending by the city. Private spending (\$1.29 billion) in the early phases of MAPS was heavily weighted toward a range of medical and research facilities constructed in the study area and is detailed in the 2009 report. The remainder of private investment was spent more broadly across multiple categories, including office (\$249 million), residential (\$238 million), hotel (\$190 million) and entertainment/cultural (\$154 million).

Downtown Investment Activity – 2009 to 2018

Public and private investment in the MAPS era continues to transform downtown. Since 2009, estimated investment activity either completed or underway in the downtown study area totaled \$3.82 billion (see Figure 37). A little more than half (56 percent) is traced to public sector investment (\$2.14 billion), with the remainder (\$1.68 billion) traced to privately funded activity.

Of the \$2.14 billion in public investment, the city engaged in the largest share (\$2.09 billion) in the period. Non-city public sector investments since 2009 totaled only \$49 million but were far more prevalent in the early MAPS period from 1995 to 2008. Only \$1.46 billion of total city investment is attributable to MAPS, with the remaining \$625 million traced to other city infrastructure projects completed in the downtown study area.

The \$1.68 billion in private investment is heavily weighted toward office (\$760 million), hotel (\$285 million), medical and research (\$276 million), residential (\$175 million), and entertainment/cultural (\$111 million). These are also the key areas where MAPS-funded activity was anticipated to stimulate private sector investment. Office investment in the period includes both Devon Tower and BOK Park Plaza. Hotel investments include the Omni Hotel currently under construction and several smaller hotels completed in the study area.

Downtown Investment Activity – MAPS Era

Across the full MAPS era from 1995 to 2018, estimated public and private investment in the downtown study area totaled \$7.0 billion. MAPS spending comprised only \$1.82 billion, or 26 percent of total new investment in the period. Other city-related investment totaled \$682 million, or 10 percent of total investment. Other public sector entities invested \$598 million in the study area, or 9 percent of total investment.

Significant private sector investment was triggered in both the early and more recent stages of MAPS development. Across the full period, a total of \$3.86 billion in private investment was competed (or is currently underway) in the study area. Private investment comprised more than half (56 percent) of

total investment in the study area to date and is more than double (2.12 times) the amount of city spending on MAPS.

Key areas of private development include medical and research (\$1.56 billion), office (\$1.0 billion), hotel (\$475 million), residential (\$412 million) and entertainment/cultural (\$263 million). This growth is highly consistent with the overarching aim of the MAPS projects to stimulate a broad-based revival of conditions in the downtown study area and create a more desirable place in which to live, work, and play.

Private Investment and Property Market Valuations

Arguably, the most anticipated economic shift from the MAPS projects is accelerated private investment in the study area. Private investment gains are realized in two ways. First, expenditures are made to construct new structures or upgrade existing ones. These investment expenditures also typically include business personal property including equipment, fixtures and leasehold improvements. Second, is any spillover effect from direct investment as the general level of property values in the area increases.

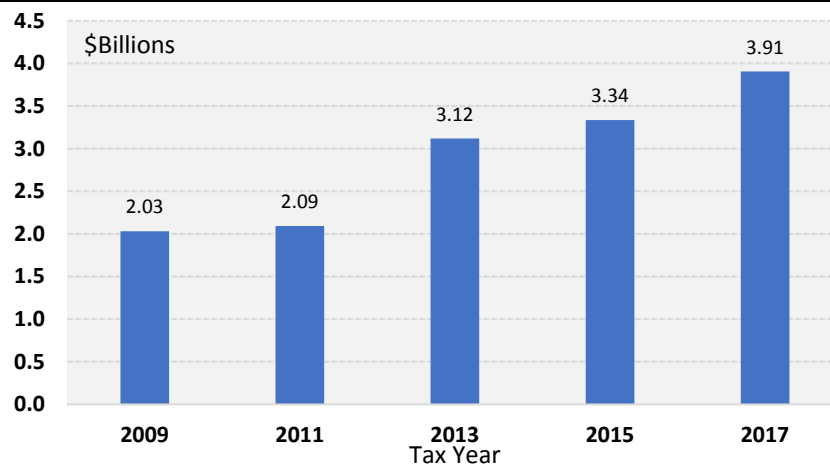
Assessment Data

Both direct private investment and changes in overall property values can be measured using county assessment data. Most private investment is subject to property tax reporting and estimates of market value are made annually. The opposing roles played by property owners and the assessor work to assure relevant estimates of market value. Although assessor determined market values provide the best available measure of changes in private property values in the study area, several caveats accompany their use as discussed in the full report.

Rising Downtown Property Values

Figure 6 details assessor determined market valuations in the downtown study area at two-year intervals from 2009 to 2017 period. Across all tracts in the study area, total market value nearly doubled (92 percent increase) from \$2.03 billion in 2009 to \$3.91 billion in 2017. For perspective, the \$1.88 billion gain in assessed property valuation since 2009 is slightly higher than the \$1.81 billion in total public expenditures on all MAPS programs approved to date. Each of the 14 tracts in the study area posted an increase in assessed market value from 2009 to 2017.

Again, this property is primarily privately owned and does not include increased valuation of publicly owned property.

Figure 6. Total Market Value of Assessed Property in Study Area

Source: Oklahoma County Assessor and City of Oklahoma City Planning Department

The increased valuation in the study area is approximately triple the 31 percent increase countywide between 2009 and 2017. Due to faster growth downtown, the share of total property valuation located in the study area increased from 4.0 percent in 2009 to 5.9 percent in 2017. Stronger downtown property valuation growth since 2009 is also consistent with relatively stronger gains in population, housing development, business formation, and job growth in the study area.

Valuations similarly increased in each two-year interval in the full period. The largest gains occurred in the 2011 to 2013 period (49 percent gain) and the 2015 to 2017 period (17 percent gain). Smaller, more inflation-like gains were posted in both the 2009 to 2011 period (3 percent gain) and the 2013 to 2015 period (7 percent gain).

Growth is also taking place in the amount of total square footage of taxable space in the downtown study area. In 2017, properties with a total of 40.85 million square feet were in the study area, with more than 5.9 million total square feet added from 2009 to 2017 – a 17 percent gain.

Downtown Office Market

Downtown remains a key office market both in Oklahoma City and the broader metropolitan area. MAPS-related improvements in the study area were anticipated to trigger increased office market development in the area. Increased business formation and rising employment described earlier in the report have accompanied a substantial increase in the downtown office market in recent years.

Office Property Valuation Changes

The downtown office market posted substantial growth between 2009 and 2017. Total assessed market value of all office properties in the study area more than doubled (130 percent gain) from \$487 million in 2009 to \$1.1 billion in 2017.

The 130 percent gain in office valuation exceeds the 92 percent gain across all property types in the period. Much of the gain occurred between tax years 2011 and 2013 as Devon Tower entered the tax rolls. As a share of total property values downtown, office space has risen from 24.0 percent of total valuation in 2009 to 28.7 percent in 2017.

The 130 percent gain in the value of downtown office property is also double the 64 percent growth for all office properties at the county level. The downtown area now accounts for 30 percent of the total value of office space in the county, up from only 21 percent in 2009.

Total office space in tax year 2017 does not yet include the newly constructed 690,000 square feet BOK Park Plaza, which is slated to be added to the tax rolls in tax year 2018. Its introduction will add an estimated 25 percent to total office property valuations downtown along with an approximately 5 percent increase in the 14.6 million square feet of taxable office space already in the study area.

Gains in Per Foot Values

The average value of downtown office space per square foot surged along with total valuations between 2009 and 2017. After averaging less than \$40 per square foot in both 2009 and 2011, average assessment values for office space jumped above \$77 in 2013 and averaged more than \$74 across the 2013 to 2017 period. Much of the rise in both square foot and total valuations reflects both the large size and relatively high cost per square foot of Devon Tower (more than \$380 per square foot).

Office Square Footage

Total office space downtown continues to rise as well. Total office square footage in the study area increased from 12.95 million square feet in 2009 to 14.6 million in 2017, a 13 percent gain in the period. The increase in office space trails the 17 percent gain in total square footage across all sectors in the study area in the period. Office space as a share of total taxable space downtown has also declined slightly from about 37.1 percent in 2009 to 35.7 percent in 2017 as other sectors added space more consistently over the period.

Downtown Residential Market

The recent surge in the number of residential units in the study area fulfills one of the critical economic development goals of MAPS to provide more housing downtown.

- Approximately 2,700 housing units (55.3 percent gain) were added in the study area between tax years 2009 and 2017.
- The total number of housing units in the study area reached 7,635 units in tax year 2017.

The surge in housing development is highly visible in the overall valuation of residential property in the study area.

- In 2017, approximately \$815 million in taxable residential property was located within the study area, more than doubling in value (106 percent gain) from \$395 million in 2009.
- Residential property now comprises 20.9 percent of the \$3.91 billion in total property valuation across all property types in the study area.
- The share of total valuation traced to residential property increased slightly from 19.4 percent in 2009 to 20.9 percent in 2017.

Gains in the study area are even larger when measured by square footage growth.

- Total residential square footage increased from 17.5 percent of total taxable space in the study area in 2009 to 20.0 percent in 2017.

- Nearly 2.9 million square feet of residential space was added between 2009 and 2017 – a 47 percent increase.
- Relative to all property types, residential experienced far faster growth in total square footage and a slightly faster pace of valuation increase.

Valuations per square foot surged along with new residential development in the study area.

- Value per square foot increased from a reported \$64 in 2009 to \$91 in 2017, a 41 percent increase.
- This trails the overall 64 percent gain in value per square foot across all property types in the period.

Bricktown Property Valuations

The MAPS projects were expected to serve as a catalyst in the revitalization of Bricktown as the core entertainment district in downtown. Prior to the onset of MAPS, property values in the area were severely depressed and a significant number of structures in the area were razed in prior decades. The condition of the area made the large-scale MAPS projects in the area possible and presented considerable potential for added private investment in the area.

This examination uses the same group of 23 Bricktown properties evaluated in the 2009 MAPS report. These properties all represent established Bricktown locations that were among the earliest areas of development following MAPS. While there is some overlap with the office and residential market analysis in the prior two sections, Bricktown reflects property that is typically services-oriented and frequently mixed-use.

The properties are tracked in tax years 2000 and 2005 for consistency with the 2009 report as well as updated to include 2009, 2013 and 2017 in four-year intervals. One property (listed as exempt) is now owned by a tax-exempt entity and is no longer tracked by the county assessor. A second property (listed as combined) was merged into an adjacent property in the group, with both now valued jointly. The exempt property is dropped in creating a time-consistent series for evaluation across all years, leaving 22 properties that are tracked consistently across the full 2000 to 2017 period.

Consistent with findings in the initial 2009 MAPS report, property values for the selected Bricktown parcels continue to rise sharply over time. Using the time-consistent series of 22 properties, the total value of properties in the sample increased from approximately \$10.1 million in 2000 to \$78.8 million in 2017, a nearly eight-fold increase. The gains represent a combination of generally rising property values, new construction, and improvements on the parcels.

Each of the 22 Bricktown parcels tracked posted an increase in market value between the 2000 and 2017 tax years. The smallest gain in the full period was a roughly tripling in value.

The Bricktown properties posted a gain in each interval of the full period as well. The largest gains were realized between 2000 and 2005 in the early years of the initial MAPS projects. Total value using the 22 properties in the time-consistent series more than tripled from \$10.1 million to \$33.3 million in the period. A smaller gain of 13 percent was reported between 2005 and 2009, slightly outpacing inflation in the period.

Gains in property valuations accelerated once again after 2009. Between the release of the 2009 MAPS report and 2017, the combined value of the Bricktown properties more than doubled (109 percent gain) from \$37.7 million to \$78.8 million. Gains were strong in both halves of the 2009 to 2017 period. Between 2009 and 2013, the value of the properties increased 44 percent using the time-consistent series. A similar gain of 46 percent was realized in the 2013 to 2017 period.

V. Lodging, Tourism, and Cultural Attractions

The MAPS projects carried significant expectations for increased visitor attractions and a much more vibrant downtown tourism and hotel sector. Hotel development began along with construction of the Bricktown ballpark and canal and has continued nearly unabated. What was once an undersized hotel sector in the pre-MAPS era has been transformed into an important and growing strength of the Oklahoma City economy.

Lodging

Pre-MAPS Lodging

Prior to the approval of the initial MAPS projects, few hotel options were available in the downtown business district. No lodging options were available in Bricktown in the pre-MAPS era. The 396-room Sheraton-Oklahoma City was the only downtown hotel with modern rooms at the onset of the initial MAPS projects but needed upgrading. Constructed in 1976, the Sheraton's proximity to the Cox Convention Center made it the de facto headquarters hotel for the city's conference industry. The aging downtown Skirvin Hotel closed in 1988 and sat abandoned until revitalized nearly two decades later. Along with limited lodging options downtown, few entertainment, food service and recreational offerings were available to serve visitors to the area.

MAPS-Era Lodging

Between 2000 and 2009, the decade following the introduction of the initial MAPS projects, the study area added a total of 1,220 hotel rooms. The number of rooms in the central business district and Bricktown tripled relative to pre-MAPS levels. Most of the development in the period was in the central business district where 869 of the 1,220 new rooms were located.

Hotel development in the study area slowed after 2009 due to the combined effects of increased room supply and the 2007-09 national recession. Construction resumed in 2013 as multiple developments broke ground in both the business district and Bricktown.

Since early 2014, 12 new hotels with 1,532 rooms have opened in the study area. Bricktown is now the fastest growing destination for new rooms, with more than two-thirds (1,148) of the 1,532 new rooms located in the entertainment district. Development has continued unabated through 2019.

In total, the downtown Oklahoma City study area is currently home to 20 hotels with 3,163 rooms. A slightly higher number of rooms are in the business district (1,664 rooms) than in Bricktown (1,499 rooms). Figure 7 provides a timeline of hotel development in the downtown study area.

Omni Convention Hotel

Most recently, the development of a new 17-story Omni conference hotel is underway adjacent to the new MAPS 3-funded downtown convention center. The \$241 million hotel will have 605 luxury guest rooms and serve as the city's official convention hotel. The larger room base of a major convention hotel is anticipated to move the city into a higher tier of convention destinations, much like the Renaissance did for the city nearly 20 years ago.

In a public-private partnership, Oklahoma City will provide \$85 million in financing funded through a city bond offering while Omni is investing more than \$150 million. The hotel is slated to offer seven restaurants, a coffee shop, burger bar and rooftop poolside bar. Groundbreaking took place in October

Figure 7. Downtown Hotel Development

Hotel	Room Count	Open Date	Address	BR= Bricktown BD= Business District
Sheraton Oklahoma City Downtown Hotel	396	Dec-76	1 N Broadway Ave	BD
Classen Inn Motel	15	Feb-82	820 N Classen Blvd	BD
Renaissance Oklahoma City Convention Center	311	Jan-00	10 N Broadway Ave	BD
Courtyard Oklahoma City Downtown	225	Jan-04	2 W Reno Ave	BD
Colcord Hotel	108	Oct-06	15 N Robinson Ave	BD
Residence Inn Oklahoma City Downtown Bricktown	151	Jan-07	400 E Reno Ave	BR
Hilton Skirvin Oklahoma City	225	Mar-07	1 Park Ave	BD
Hampton Inn Suites Oklahoma City Bricktown	200	Feb-09	300 E Sheridan Ave	BR
Hilton Garden Inn Oklahoma City Bricktown	155	Jan-14	328 E Sheridan Ave*	BR
Homewood Suites Oklahoma City Bricktown	100	Jan-14	328 E Sheridan Ave*	BR
Autograph Collection Ambassador Hotel Oklahoma City	54	Mar-14	1200 N Walker Ave	BD
aloft Hotel Oklahoma City Downtown Bricktown	134	Apr-14	209 N Walnut Ave	BR
Holiday Inn Express & Suites Oklahoma City Downtown Bricktown	124	Jan-15	101 E Main St	BR
Embassy Suites Oklahoma City Downtown Medical Center	195	Feb-15	741 N Phillips Ave	BD
21c Museum Hotel Oklahoma City	135	Jun-16	900 W Main St	BD
Springhill Suites Oklahoma City Downtown	124	Jul-17	600 E Sheridan Ave	BR
AC Hotels by Marriott Oklahoma City Bricktown	142	Dec-17	411 E Sheridan Ave	BR
Hyatt Place Oklahoma City Bricktown	134	Mar-18	20 Russell M. Perry Ave	BR
Candlewood Suites Oklahoma City Bricktown	97	Apr-18	933 East Reno	BR
Staybridge Suites Oklahoma City Downtown	138	Sep-18	120 S Lincoln Blvd	BR
Total - Downtown	1,664			
Total - Bricktown	1,499			
Total Available Rooms	3,163			
Omni Oklahoma City Hotel (MAPS 3 Project)	605	Early 2021	400 S Robinson Ave	BD
Total (Available + MAPS 3)	3,768			

Source: Oklahoma City Convention & Visitor Bureau; Smith Travel Reports, Sep 2018.

Notes: The Hilton Garden Inn and Homewood Suites are adjoining properties.

2018 and the hotel is set to open in early 2021. The new MAPS 3 convention center is expected to open just prior to the hotel in 2020.

The 605 planned rooms at the Omni will push the total room count in the study area to 3,768. This is a nearly 10-fold increase over the roughly 400 hotel rooms available downtown at the start of the MAPS projects. A 2010 study of the Core-to-Shore area by the Urban Land Institute suggested that 4,000 downtown hotel rooms, including a headquarters hotel with 600 to 700 rooms, were needed to move the city into the same tier as other peer convention markets. Given other planned hotel development downtown, the city will undoubtedly meet this objective with the completion of the Omni in 2021.

Tourism

The 2009 MAPS report detailed many of the initial tourist attractions added to the downtown area in the early years of the MAPS projects. These include both public MAPS projects and numerous private venues and events.

Figure 8 summarizes visitation and visitation numbers at several key attractions in the downtown study area. Estimates suggest that 10 million to 12 million visitors and patrons annually attend events and attractions in the study area in recent years.

MAPS Attractions

The most important contribution of MAPS to downtown tourism is likely the creation and development of the Bricktown entertainment district. General visits to Bricktown are the largest single source of visitation to the study area. Estimates suggest that 6 million visits are made to Bricktown annually, roughly half of total visits to the area.

Among the MAPS sports venues, Chesapeake Energy arena is the most-visited individual MAPS venue, attracting an average of 1.2 million visitors each year in the 2015 to 2017 period. Along with a traditionally sold-out NBA schedule, the arena remains a popular national concert stop. The Bricktown Ballpark hosted approximately 600,000 visits annually in the 2015 to 2017 period. The ballpark draws more than 450,000 each year for baseball games, with the remainder attending other events and activities.

Cox Convention Center visitation roughly equals that of baseball at the ballpark, drawing an average of nearly 450,000 visitors annually in recent years. The construction of the new downtown convention center and accompanying convention hotel is expected to allow for significant enhancement of the city's stature as a national convention destination.

The renovations and enhancements at the Civic Center Music Hall have been well received by patrons. The Music Hall has averaged almost 350,000 visits annually in recent years. A record number of visitors exceeding 419,000 were hosted in 2017.

Activities along the Oklahoma River continue to draw a range of visitors. A small set of sponsored events at the river attracted approximately 50,000 visitors annually the past five years. In addition, the water taxis on the Bricktown Canal draw more than 100,000 riders annually.

The Ron J. Norick Library remains a key education-related destination in the downtown area with approximately 300,000 in-person visits annually.

Figure 8. Visitation/Participation in Downtown/Bricktown Area

Site	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
MAPS-Related:															
SBC Bricktown Ballpark - Games	380,051	474,206	542,095	525,000	529,600	459,295	397,219	381,343	385,385	403,115	408,816	405,000	479,047	460,855	451,033
Other events at Ballpark				181,000	200,000	164,886	250,000	157,405	139,873	141,798	147,355	143,000	112,390	159,373	146,778
Water Taxi - Canal Boats	103,500	110,470	139,174	139,174	139,174	141,686	127,011	n/a	118,341	119,500	117,097	113,407	115,000	n/a	98,852
Trolley Bus service	113,258	118,149	93,496	78,245	65,724	68,114									
Cox Convention Center	648,106	684,641	577,015	605,952	586,454	386,932	526,572	533,774	569,503	579,978	562,966	419,483	490,366	396,269	438,100
Civic Center Music Hall	336,657	277,246	252,074	268,262	310,284	314,100	338,317	251,178	254,577	265,089	276,882	300,798	274,291	338,332	419,204
Chesapeake Energy Arena	1,122,261	933,722	957,636	1,278,591	965,969	941,700	1,162,860	1,186,212	801,989	1,655,020	1,476,801	1,571,002	1,239,355	1,227,917	1,163,008
Downtown Library In-Person Visits						363,121	368,742	366,830	378,517	324,852	325,035	287,585	307,333	286,892	322,309
Oklahoma River:															
Matt Hoffman Skate Park				30,000	27,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000
Races, regattas, boathouse-related		43,000	53,000	100,000	77,000	68,847	15,000	43,700	55,000	45,120	75,000	186,539	56,550	122,800	48,400
Boat Parade					35,000	40,000									
River Fest					5,000	5,000									
Oklahoma River Cruises									15,000	12,172	12,817	13,461	12,797	15,956	14,569
Embark Downtown Discovery						68,114	43,175	64,467	81,201	84,000	76,146	69,635	72,146	46,409	50,855
MAPS-Related Total	2,847,735	2,799,805	2,952,384	3,576,542	3,290,371	3,051,795	3,568,396	3,319,673	3,114,849	3,925,138	3,750,906	3,756,941	3,359,006	3,229,074	3,413,352
Estimated visits to Bricktown [c]	1,000,000	1,000,000	2,000,000	2,000,000	2,000,000	2,900,000	2,987,169	5,000,000	6,000,000	6,000,000	6,000,000	6,000,000	6,000,000	6,000,000	6,000,000
Oklahoma City National Memorial:															
National Memorial Museum	194,000	197,000	194,000	200,000	164,000	170,000	150,000	141,920	139,773	127,581	200,000	124,378	150,000	139,135	150,233
Estimated visits to Memorial grounds	301,000	262,010	258,020	350,000	382,000	330,000	300,000	266,330	222,481	252,012	500,000	201,701	360,000	291,381	369,893
Oklahoma City Museum of Art	92,324	120,560	210,075	130,000	130,000	170,000	145,000	150,000	130,000	135,000	135,000	135,000	96,000	128,473	94,889
Myriad Botanical Gardens:															
Crystal Bridge [a]	89,881	85,749	74,287	70,028	60,856	94,000	76,990	[a]	56,872	112,089	80,000	72,000	73,011	98,309	76,840
Estimated visits to grounds	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	[a]	800,000	1,000,000	1,000,000	1,000,000	754,604	242,438	222,099
Stage Center Theater	89,205	77,131	71,491	56,565	[b]	[b]									
Downtown Special Events:															
Arts Festival	750,000	750,000	750,000	750,000	700,000	750,000	750,000	750,000	750,000	750,000	675,000	750,000	750,000	700,000	750,000
Downtown in December	198,853	220,300	200,000	200,000	200,000	205,000	78,525	100,000	133,500	166,750	150,000	159,700	173,000	250,000	300,000
Opening Night (New Year's Eve)	55,000	62,000	70,000	68,000	68,000	73,000	65,000	60,000	75,000	75,000	70,000	25,000	25,000	40,000	12,000
Jazz Fest					14,000		5,500	5,000	1,000	8,000	1,200		4,000	4,000	4,000
Dead Center Film Festival					5,200	5,216	6,839	10,000	15,000	20,000	21,000	25,000	30,000	30,000	30,000
OKC Memorial Marathon					6,932	16,000	19,300	22,000	26,000	27,000	24,000	26,000	25,500	24,814	25,731
Red Earth											26,121	23,455	19,564	14,555	14,154
Area Total	6,474,096	6,416,184	7,442,363	8,030,817	7,672,193	8,765,011	8,843,219	9,520,159	11,179,012	12,334,076	12,391,236	12,082,144	11,649,954	11,047,908	11,232,947

Source: Oklahoma City Convention and Visitors Bureau, Downtown Public Library, and City of Oklahoma City.

Notes: [a] In 2007 closed for 3 1/2 months. [b] Included in Civic Center Music Hall. [c] Includes BassPro and Harkins Theaters. Year-over-year fluctuations in visitor totals could be due to construction, venue change, weather, etc.

VI. Downtown Transportation

Transportation in the downtown study area continues to adapt to the rapid pace of economic and demographic change induced by MAPS. The most visible sign of changing transportation downtown is the new MAPS 3-funded streetcar system. The Oklahoma City Streetcar opened in December 2018 and provides regular passenger service throughout the downtown study area. Bus service continues to play a vital role in transporting residents to and from the downtown area. More recently, other more nontraditional forms of transportation have diversified the way residents move about downtown. These include the use of bicycles and scooters as a circulator in the central business district and Bricktown. Ferry cruises on the Oklahoma River provide a unique form of water travel and entertainment. Amtrak service to Ft. Worth on the Heartland Flyer is also available at Santa Fe Station.

Oklahoma City Streetcar

A key element of MAPS 3 is a modern streetcar and transit system for downtown Oklahoma City. The \$130 million investment in the EMBARK-operated streetcar system is fully funded by MAPS 3 sales tax receipts. The OKC Streetcar is a key component of Oklahoma City's Fixed Guideway Plan, the blueprint for the future of public transit in the city. The streetcar represents a critical piece of infrastructure that links several downtown MAPS projects and plays a key role in the long-range transportation plan for downtown.

The streetcar's path is closely aligned with existing and emerging economic development corridors downtown and will make all areas of downtown readily accessible to workers, residents and visitors (see Figure 9). The line is centered around the central business district, linking it with Automobile Alley and Midtown to the north, Scissortail Park (and the new Hotel and Conference Center) to the south and Bricktown to the southeast.

Changing Downtown Commuting Patterns

The commuting pattern for downtown residents is slowly shifting away from traditional auto transportation and toward non-traditional forms such as cycling, walking and working from home. An additional 841 new working residents are reported in the downtown study area from 2010 to 2017. Consistent with traditional commuting patterns, approximately two-thirds of the new residents drive to work, either alone or carpool. However, the share of these workers using an auto dropped about two percentage points in the period, from 83.8 percent in 2010 to 81.7 percent in 2017.

Other gradual shifts in the means of transportation are visible downtown. Among the new residents in the study area is an increase of almost 300 persons walking to work. Nearly 500 residents (10 percent) in the downtown study area now report walking as their primary form of commuting to work, a doubling relative to 2010. Offsetting the gains in walking are small reductions in those taking public transportation or using a taxi, motorcycle or other means.

Streetcar Area Economic Profile – Three-Block Impact Zone

The introduction of the streetcar system carries clear economic development goals:

1. Boost the overall quality of life for all Oklahoma City residents
2. Leverage private economic development through public investment

3. Contribute to the creation of new jobs in the downtown area

The streetcar was approved in 2009 and the path finalized in 2011. A key measure of the success of the MAPS-funded streetcar is the response of economic activity and private investment along the streetcar line. This section evaluates a range of economic changes that are taking place in the area immediately adjacent to the streetcar line since the announcement of the final path.

Employment Growth

When narrowed down to the three-block impact zone around the streetcar, employment becomes highly concentrated. Using LEHD employment data for 2015, the most recent year of data available, approximately 41,600 jobs were based within the three-block impact zone around the streetcar path. This represents two-thirds of the 61,123 jobs in the full downtown study area.

Employment in the impact zone began growing rapidly beginning in 2009 after reversing a long-term decline.

- Downtown employers within three blocks of the line added approximately 8,000 net new jobs between 2009 and 2015, a 23 percent increase.
- Approximately eight of nine total jobs created in the full study area between 2009 and 2015 are within three blocks of the streetcar line.
- The 23 percent job gain near the streetcar line also outpaced the 17 percent gain across the full study area, as well as the gain for the county (12.4 percent), metro area (12.5 percent) and state (8.0 percent) during the same period.
- Since the 2011 announcement of the streetcar path, 5,700 jobs (15.8 percent increase) have been added in the impact zone. This represents approximately 85 percent of the nearly 6,600 total jobs created since 2011 in the full study area.

The base of new workers within the three-block zone who are potential daily streetcar riders is expected to increase steadily as the downtown workforce expands over time.

Rising Property Values

The three-block impact zone is experiencing rapid property valuation gains.

- The cumulative assessed market value of all properties located within the three-block zone more than doubled in market value (115 percent gain) from 2011 to 2017.
- In tax year 2017, property with a total assessed market value of \$2.5 billion was located within three blocks of a streetcar stop.
- The 115 percent gain in the three-block impact zone exceeds the 87 percent gain across all census tracts in the full study area from 2011 to 2017.
- Market values in the three-block zone also increased at more than three times the rate of total citywide property values (34 percent gain) since 2011.

Rising Square Foot Values

On a square footage basis, property values in the three-block zone have increased sharply since tax year 2011.

- Average property values in the three-block zone have increased from \$54 in tax year 2011 to a reported \$97 in tax year 2017, a more than 80 percent gain in the period.

- Gains are sizeable in all three blocks adjacent to the streetcar line in the period. Assessor-determined market values per square foot increased 97 percent in the first block, 85 percent in the second block and 80 percent in the third block.
- The gains in the three-block zone also far outpaced the 20 percent citywide gain in property values on a per square foot basis in the period.

Total Square Footage Growth

The streetcar is also expected to increase the density of development along the permanent path. Since the path was announced in 2011, total square footage in the three-block zone is being utilized far more intensively.

- Square footage of properties of all types has increased 19.2 percent within three blocks of the streetcar line.
- This outpaced 16 percent growth in the full study area and 12 percent growth citywide in the period. Property utilization near the streetcar line has shifted toward greater entertainment, hospitality, office and residential use, with a lessened role for industrial and general commercial use.

Office Space

The office market and downtown employment are closely tied to the long-run strategy underlying the streetcar system. Approximately 1.54 million square feet of net new office space has been added (15.4 percent gain) within three blocks of the streetcar line since 2011. Much of the added space (1.4 million square feet) is located within one block of the line and is traced to the addition of Devon Tower in tax year 2013.

Small increases have taken place since 2013 pushing the current total for office space within three blocks of the streetcar line to 11.51 million square feet in 2017. Total office space in 2017 does not yet include 690,000 square feet of space that will be added as BOK Park Plaza, the new downtown offices of Bank of Oklahoma in Oklahoma City, is added to the tax rolls in tax year 2018.

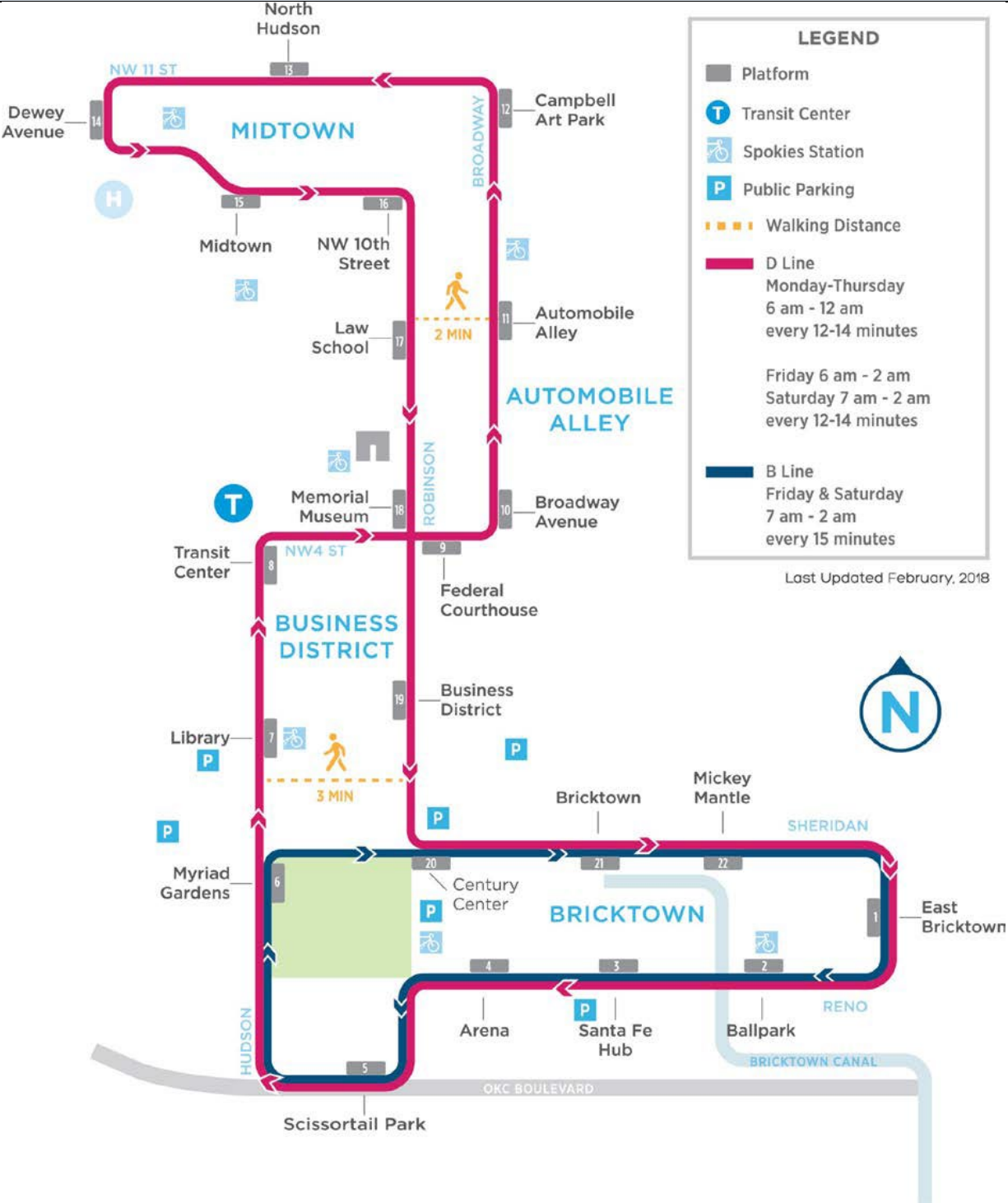
Residential Unit Growth

Based on county assessment data, the number of downtown residential units located within three blocks of the streetcar path has nearly doubled to more than 3,500 since the streetcar path was announced in 2011. Of the 1,658 residential units added between 2011 and 2017, 124 units in the first block adjacent to the line, 734 units in the second block and 800 units in the third block.

Hotel and Accommodations

Tourists and other visitors staying in hotels in the downtown area are also expected to provide consistent ridership. As described in an earlier section of the report, the downtown study area is home to 20 hotels with 3,163 rooms at the end of 2018. A slightly higher number of rooms are in the business district (1,664 rooms) than in Bricktown (1,499 rooms). However, nearly all the rooms in the study area are located within the three-block impact zone of the streetcar system. Note that these numbers do not include the 605-unit Omni Hotel that will open in early 2021.

Figure 9. Downtown Streetcar Map



Source: Embark

VII. MAPS Evaluation

The MAPS initiatives remain the largest and most visible public economic development efforts undertaken in Oklahoma City the past 25 years. The results now serve as a centerpiece for the long-range economic development efforts of the city. In many ways, the MAPS projects established a new national identity for Oklahoma City going forward, particularly for downtown.

2009 MAPS Report Findings

The 2009 evaluation of MAPS concluded that the projects halted years of stagnation downtown and provided the catalyst needed to reverse the fortunes of the area. The report concluded with three overarching observations regarding changes traced to the MAPS programs up to that point and going forward. First, the downtown area experienced a sharp reduction in the decay and blight present in the downtown core of Oklahoma City. Second, some risk of overinvestment from MAPS was possible during periods of economic downturn or volatility from an individual industry such as energy. And, third, the MAPS initiatives were the key force underlying the revival of downtown and that these improvements should produce long-lived effects.

Key Policy Findings

The results compiled in the current report benefit from two decades of history since the first MAPS venues opened in the late 1990s and provide a direct follow-up to the 2009 findings. The analysis suggests several conclusions about the success and sustainability of outcomes related to the three rounds of MAPS projects to date:

1. **The revitalization of the downtown study area by MAPS has proved to be long-lived.** Momentum surrounding the MAPS projects since the initial projects opened in the late 1990s continues today. Many of the MAPS projects are now the defining components of renewed economic activity downtown. Upon completion of the remaining projects in MAPS 3, the long-run path of the downtown study area will benefit from yet another source of added momentum.
2. **A new era of accelerated activity in the downtown study area began in about 2009.** The resurgence in growth in downtown population, housing, employment and business formation since 2009 is substantial relative to the region's performance in prior decades. The downtown economy is now outperforming the broader county, metropolitan area and state based on most performance measures after underperforming for many years.
3. **Public spending on MAPS led to sustained increases in private sector investment activity.** The anticipated boost to private investment from MAPS began with the original MAPS projects and has continued through the MAPS 3 era. Since 2009, total investment in MAPS and other investment in the downtown study area from all sources reached \$7 billion. The city's \$1.82 billion direct investment in MAPS was accompanied by private investment of \$3.86 billion. Other public investment in the area included \$682 million by the city and \$598 million by other public entities in the period.
4. **The desired reshaping of downtown as a place to live, work and play is taking form.** The combination of population and housing gains, employment and business formation growth, and

expanded cultural, entertainment and recreation options are all desired outcomes of the placemaking process underlying MAPS. The additional factors of improved downtown transportation, expanded educational offerings and more diverse demographics further enhance the attractiveness of the area to future residents. All these changes were anticipated outcomes of MAPS and are visible in ongoing trends.

5. **Many anticipated demographic and economic changes are taking place downtown.** Downtown residents are now increasingly younger, more educated, higher earning and more racially diverse than at the city, county and state levels. Job growth among downtown residents is also outpacing growth in the total number of jobs downtown (regardless of where workers live).
6. **The MAPS process maintained momentum through a two-year energy-driven downturn at the state level.** Concerns over sustainability and the potential to overbuild typically accompany all efforts to expand public infrastructure and revitalize a region. The continued momentum in the region during the recent two-year oil-and-gas recession in 2015 and 2016 suggests that the MAPS process continues to progress largely independently of activity in the broader regional economy.
7. **Increased investment has produced a long-run uptrend in overall property values.** Along with increased total investment, property values in the downtown study area have increased sharply since 2009 on a square foot basis. Rising values per square foot are significant across both the office and residential housing sectors. Similarly, a group of selected properties in the Bricktown district more than doubled in taxable value between 2009 and 2017.
8. **Visitation to the downtown study area has broadened to include a diverse range of venues.** Increased tourism to downtown from outside the region was a key goal of the MAPS projects. Relative to the pre-MAPS era, the tourism market has now broadened to include recreation, entertainment, cultural and arts attractions, dining, sporting events, outdoor events and more. The increased employment base and rising number of business establishments continues to attract increased business-related visits as well.
9. **The core of a comprehensive downtown public transportation system is now in place.** The vital role of public transportation in a city's urban core underlies much of the MAPS process. The completion of the downtown street car coupled with the redevelopment of Santa Fe station have positioned the city to provide comprehensive intermodal transportation to residents downtown and throughout the region.
10. **Oklahoma City as a convention and events destination is on the verge of rising to a higher tier nationally.** The long-standing objective to enhance the city's standing as a convention and events destination is near realization. The upcoming completion of the new convention center and Omni Hotel, along with the remarkable growth of the downtown hotel sector, will provide the infrastructure needed to compete for far larger conventions than possible in prior years. The remaking of downtown as an entertainment destination and the completion of the streetcar system further enhances the conference potential of downtown.

11. **Residents continue to express high levels of satisfaction with the city and the direction it is moving.** Relative to the U.S. and large peer cities, Oklahoma City continues to receive a higher rating on nearly every measure of satisfaction evaluated. The question most related to the implementation of MAPS may be satisfaction with the direction the city is moving. When asked if the city is moving in the right direction, 72 percent of OKC residents rated the city as excellent or good. Nationally only 53 percent of cities report high satisfaction levels. For cities over 250,000 in population, only 41 percent report citizens being highly satisfied with the direction the city is moving.

Conclusion

The 25 years of investment from the three iterations of MAPS programs are a clear catalyst for Oklahoma City's ongoing reinvention. By addressing Oklahoma City's transportation, education, recreation, entertainment, arts and culture, public space and lifestyle needs through transformative MAPS projects, Oklahoma City has changed its economic trajectory and created a place where people and businesses want to relocate. In turn, the public, debt-free investments of the MAPS program have spurred \$3.86 billion in private investment in the MAPS study area. All combined, the MAPS programs have reshaped Oklahoma City as a place to live, work and play, and set a foundation for Oklahoma City's next era of growth.

Appendix 1. MAPS Projects						
\$350 million project passed by voters December 14, 1993 with a 54 percent majority; all projects completed in 2004						
PROJECTS		COST	PROJECT DESCRIPTION	STATUS	LOCATION	DEVELOPMENT FOCUS
1	Chickasaw Bricktown Ballpark	\$34 million	Construction of a new 12,000 seat Professional Baseball Leagues-compliant stadium	Completed in 1998; current home of the Oklahoma City Dodgers.	Bricktown	Recreation/entertainment and tourism
2	Bricktown Canal	\$23 million	Construction of a 1-mile tree-lined urban canal system with water taxi, hiking and bicycle trails, water features, and landscaped parks	Completed in 1999, improvements in 2003-04	Bricktown	Recreation/entertainment and tourism
3	Cox Convention Center	\$60 million	Renovation and expansion (100,000 new sq. ft.) of the former Myriad Convention Center including a new ballroom and grand staircase, new audio-visual equipment, updated electrical and mechanical systems	Completed in 1999	Central Business District	Public convention and meeting space, tourism
4	Chesapeake Energy Arena	\$87.7 million	Construction of a new 586,000 sq. ft., 20,000+ seat, 3-level sports arena for hosting a major league sports franchise	Completed in 2002, renovated in 2009-10; current home of the NBA Oklahoma City Thunder	Central Business District	Recreation/entertainment and tourism
5	Civic Center Music Hall	\$53 million	Complete interior renovation of much of the existing music hall including new balconies and box seats, private suites, practice rooms, and dressing rooms	Completed in 2001	Central Business District	Civic/arts/entertainment and tourism
6	Oklahoma River	\$53.5 million	7-mile stretch of Canadian River converted to series of river lakes. Landscaped trails and recreational facilities. Now known as Oklahoma River.	Completed in 2004	South of Downtown/Bricktown	Recreation/entertainment and tourism
7	Ron J. Norick Downtown Library	\$21.5 million	Construction of a new 4-story 112,000 sq. ft. downtown public library including new and equipment, classrooms, and conference center space.	Completed in 2004	Central Business District	Education
8	State Fairgrounds Improvements	\$14 million	New livestock show facilities, new horse barns, and renovations and improvements of the arena and several exhibition buildings.	Completed in 1998	State Fair Park	Recreation/entertainment and tourism
9	Oklahoma Spirit Trolleys	\$5 million	Transportation system between downtown/Bricktown, the I-40/Meridian hotel and restaurant district, and Stockyards City.	Completed in 1999, decommissioned in 2010	Downtown area	Transportation
	Total Cost	\$350 million	Raised approximately \$363 million	Sales tax extended six months in1998 'Finish MAPS Right' with a 68 percent majority		
Source: City of Oklahoma City and Greater Oklahoma City Chamber						

Appendix 1. (Cont.) MAPS for Kids Projects						
\$684 million (\$514 million sales tax and \$180 million bond issue) approved by voters November 13, 2001 with a 61 percent majority; projects mostly completed by 2018						
PROJECTS		COST	PROJECT DESCRIPTION	STATUS	LOCATION	DEVELOPMENT FOCUS
1	OKC Public School Construction and Renovation	\$470 million	Replacement, renovation, or additions at every OKCPS school district building. Includes construction of a new downtown elementary school (John W. Rex). School configurations changed to better match student population demographics. Approximately 100 construction projects at 75 district schools. New gymnasiums added at all district elementary schools. OKC public schools received 70 percent of MAPS for Kids sales tax funding and a \$180 million bond issue.	Mostly completed	Citywide	Education
2	Suburban Public Schools Construction and Renovation	\$153 million	Construction, expansion, or renovation of school buildings in 23 suburban school districts located within Oklahoma City. Approximately 400 approved projects across 23 districts. Suburban districts split 30 percent of MAPS for Kids sales tax funding based on number of students living within Oklahoma City limits.	Completed	Suburban school districts	Education
3	Technology Upgrades	\$52 million	Hardware and software purchased with sales tax funding included wireless mobile labs, network printers, presentation stations, desktop computers, system and classroom software, library automation system, network equipment, and classroom phones. Items purchased with bond funding included a laptop for each teacher, substitute teacher management system, printers, technical services contract, server upgrades, central telecom system, messaging system, data storage, wiring, voice over IP system, and other hardware and software systems.	Completed	Citywide	Education
4	District Transportation	\$9 million	Purchased 160 new buses. 111 conventional buses, 13 smaller buses, and 36 mini buses. Ten buses with wheelchair lifts.	Completed	Citywide	Education/Transportation
	Total Cost	\$684 million	Raised approximately \$700 million			
Source: City of Oklahoma City and Greater Oklahoma City Chamber						

Appendix 1. (Cont.) MAPS 3 Projects

10-year, \$777 million building campaign approved by voters on Dec. 8, 2009 with 54 percent majority; most projects currently underway

PROJECTS	COST	PROJECT DESCRIPTION	STATUS	LOCATION	DEVELOPMENT FOCUS
1 Scissortail Park (Downtown)	\$132 million	Construction of a new 70-acre urban park extending from the core of downtown to the shore of the Oklahoma River. Skydance Bridge connects the north and south sections of the park.	Underway: completion of the 40-acre north section in 2019; completion of the 30-acre south section expected in 2021.	Downtown	Recreation/entertainment, lifestyle amenities, and tourism
2 Downtown Streetcar	\$131 million	Construction of a modern downtown streetcar system serving as an urban circulator and connector linking Midtown, Central Business District, Scissortail Park, and Bricktown. Project includes the purchase of 7 streetcars, construction of 5.2 miles of in-ground track and 22 stops, and a new streetcar maintenance facility.	Completed in 2018: service commenced December 2018.	Downtown/Bricktown	Transportation
3 Downtown Convention Center	\$288 million	Modern replacement for the current convention center. Specifications include a 200,000 sq. ft. exhibit hall, 45,000 sq. ft. meeting space, and 30,000 sq. ft. ballroom. Located on the east side of Scissortail Park.	Underway: Convention center completion expected in late 2020.	Downtown	Public convention and meeting space, tourism
4 Sidewalks	\$18.1 million	Construction of new and improved sidewalks in areas with high demand for pedestrian amenities.	Underway; current plan is for 60 of new and improved sidewalk miles using \$9 million of additional City reserves.	Citywide	Transportation
5 Trails	\$39.5 million	Construction of 50 miles of trails linking the Oklahoma River with Lake Overholser, Lake Hefner, and Lake Draper.	Underway: West River Trail completed in 2015; Will Rogers Trail completed in 2018; Lake Draper Trail scheduled completion in 2019.	Citywide	Recreation, health, lifestyle amenities, and transportation
6 RIVERSPORT Rapids	\$57 million	Construction of a whitewater rafting and kayaking center on the Oklahoma River as a watersport destination, including upgrades to the existing lighted recreational and competitive rowing venue.	Completed: race course improvements completed in 2013; rapids completed in 2016. The site is designated an official U.S. Olympic & Paralympic Training site.	Boathouse District	Recreation/entertainment and tourism
7 Senior Health and Wellness Centers	\$52 million	Construction of four new state-of-the-art wellness centers providing exercise equipment and programs, including aquatics, to seniors in a social and recreational setting.	Underway: N. Rockwell Ave. center opened 2017; S. Walker Ave. center opened 2018; third center 2020 opening; fourth center 2022 opening.	(1) N. Rockwell; (2) S. Walker; (3) NE 36th and Lincoln Blvd. and (4) SW 134th and Western Ave.	Health and lifestyle amenities
8 Bennett Event Center	\$58.7 million	Construction of a new 279,000 sq. ft. exhibition hall with 201,000 sq. ft. of contiguous exhibition space, 12,000 sq. ft. lobby, 10,000 sq. ft. commercial catering kitchen and improvements to parking and other infrastructure.	Completed in 2017. The largest event space in Oklahoma City.	State Fair Park	Recreation/entertainment and tourism
Projected Total Cost	\$777 million	Raised approximately \$805 million			

Source: City of Oklahoma City and Greater Oklahoma City Chamber

