

# OKLAHOMA CITY MAPS PROJECTS

Metropolitan Area Projects

ECONOMIC IMPACT STUDY

25 Years of  
Change Through  
Public and Private  
Investment

NOVEMBER 2019 | Full Report



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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. Introduction

Oklahoma City recently marked 25 years of public capital improvement projects funded through the ongoing MAPS initiatives. The MAPS projects addressed needs in transportation, education, recreation, entertainment, arts and culture, public space and lifestyle amenities. The resulting change in the city during the MAPS era has been substantial and transformative.

**Why MAPS?** The current activity level in downtown Oklahoma City leaves few reminders of the conditions present in the pre-MAPS era. Downtown had settled into stagnation and then entered decline in the decade following the Oil Bust of the early 1980s. When MAPS was first proposed in the early 1990s, no catalyst capable of propelling economic renewal in downtown Oklahoma City was visible.

Downtown's condition reflected decades of insufficient public and private investment. Private housing, retail and office development migrated outside the city's central core into other markets across the city.<sup>1</sup> At 620 square miles, the sheer size of the city's footprint allowed for seemingly unlimited and inexpensive growth in suburban areas and other rural markets.<sup>2</sup> Oklahoma City had joined a group of mid-sized cities across the United States experiencing robust growth in the suburbs while the central city withered away. More importantly, it was losing ground to competing cities as a modern business hub.

Economic and demographic trends were also working against the city's competitive posture as a regional business hub. The most vibrant and desirable cities to live in were increasingly urban. Workers, particularly the young and educated, were seeking urban areas with a strong job market, a range of lifestyle amenities, and sufficient public services. The continued decline of downtown Oklahoma City presented an immense hurdle for efforts to develop a nationally competitive urban economy. As a result, expectations were guarded over whether MAPS could trigger the revitalization of downtown.

**Public Investment as an Economic Development Strategy.** Building a complete city would require the revitalization of downtown, and public investments through MAPS were viewed as the tool that could jumpstart the process. Oklahoma City leaders believed that the effects of insufficient public investment downtown could be reversed over time through the targeted MAPS initiatives. Renewed public investment would in turn spur private investment in a joint effort to revitalize downtown. A vibrant downtown area would then serve as the hub of a much more vibrant, livable, and competitive Oklahoma City metropolitan area.

In describing the process of balancing growth on the periphery of the city with a strong central core, comparisons were made to fast-growing Phoenix, another city with a large footprint (516 square miles) but a much more vibrant central core. As Oklahoma City councilman David Greenwell described the process, "They show you can embrace both a sprawling city and maintaining a focus on developing your downtown core. And the two do not conflict."

The MAPS initiatives followed 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. The presence of each of these components would serve to create a vibrant urban locality that offered both employment opportunities and lifestyle amenities.

**Downtown Revitalization.** In the 25 years since the onset of the initial MAPS projects, Oklahoma City and its residents have enjoyed transformative change in the quality of life downtown. The reconstruction of the area and the subsequent turnaround in the City's trajectory has been substantial and consistent.

All three rounds of MAPS projects have contributed to the resurgence of downtown. 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 development 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 key step in improving educational outcomes in 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 dilapidated education infrastructure. The key direct 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 completed, and the extent of their future contribution is already being realized. Many of the MAPS 3 projects represent vital aspects of the city's long-range plan for downtown revitalization that started 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.

**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 new round of projects approved under the MAPS 3 initiative is now underway. The City recently solicited public recommendations for potential MAPS 4 projects.

This report extends the 2009 MAPS 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.

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 has 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 investments 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; and
3. Detail MAPS 3 initiatives completed or currently underway and the role these projects are expected to play in shaping future growth in Oklahoma City.

The report documents the activities of the MAPS projects but is more focused on the resulting changes in the demographic, workforce, lifestyle, and economic conditions enjoyed by residents of Oklahoma City. The MAPS projects are viewed as the clear catalyst behind the revitalization underway in downtown Oklahoma City. These public investments in turn triggered significant private development in housing, lodging, retail, office space, and recreational offerings. Each major area of visible change is evaluated throughout the report.

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 twenty-five years.

The initial section of the report reviews the three rounds of MAPS projects and other related city economic development initiatives. The second section of the report details the downtown study area, the site of most of the MAPS projects approved to date. The following two sections examine changes in the downtown study area across a range of demographic and economic factors.

The report shifts in the following section to an evaluation of public and private investment, focusing on changes in property valuations and activity in key downtown markets such as office and residential. The next two sections examine changes that have occurred in lodging, tourism, and transportation in the downtown study area in the MAPS era. A detailed evaluation of the change underway around the path of the downtown streetcar is provided as well. The final section of the report reviews the major findings contained throughout the report.



## II. Three Rounds of MAPS Projects

Oklahoma City voters have now approved three consecutive rounds of MAPS public infrastructure improvement projects – MAPS in 1993, MAPS for Kids in 2001, and MAPS 3 in 2009. Because of the pay-as-you-go approach to MAPS, the first completed project (downtown ballpark) opened in 1998 and many MAPS 3 projects remain underway today.

The initial MAPS projects focused on reversing years of decline in the city’s downtown core. MAPS for Kids subsequently targeted the foundational issue of public education in Oklahoma City and the challenges presented by an aging education infrastructure. MAPS 3 targeted further improvements to downtown but included additional citywide initiatives, with many focused on modern lifestyle amenities.

**What is Unique About MAPS?** 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

The details of each project pursued within the three MAPS initiatives are described in greater detail in the remainder of this section. Figures 1-3 provide a detailed overview of the projects within each MAPS initiative.

**Figure 1. MAPS Projects**

Projects totaling \$350 million in investment passed by voters Dec. 14, 1993, with a 54% 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
<b>Total Cost</b>		<b>\$350 million</b>	Raised approximately \$363 million	Sales tax extended six months in 1998 'Finish MAPS Right' with a 68% majority		

Source: City of Oklahoma City and Greater Oklahoma City Chamber

**Figure 2. MAPS for Kids Projects**

\$684 million (\$514 million sales tax and \$180 million bond issue) approved by voters Nov. 13, 2001, with a 61% majority; projects mostly completed by 2018

PROJECTS	COST	PROJECT DESCRIPTION	STATUS	LOCATION	DEVELOPMENT FOCUS
1 <b>OKC Public School Construction and Renovation</b>	\$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% of MAPS for Kids sales tax funding and a \$180 million bond issue.	Mostly completed	City-wide	Education
2 <b>Suburban Public Schools Construction and Renovation</b>	\$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% of MAPS for Kids sales tax funding based on the number of students living within Oklahoma City limits.	Completed	Suburban school districts	Education
3 <b>Technology Upgrades</b>	\$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	City-wide	Education
4 <b>District Transportation</b>	\$9 million	Purchased 160 new buses. 111 conventional buses, 13 smaller buses, and 36 minibuses. Ten buses with wheelchair lifts.	Completed	City-wide	Education/Transportation
<b>Total Cost</b>	<b>\$684 million</b>	Raised approximately \$700 million			

Source: City of Oklahoma City and Greater Oklahoma City Chamber



**Figure 3. MAPS 3 Projects**

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

PROJECTS	COST	PROJECT DESCRIPTION	STATUS	LOCATION	DEVELOPMENT FOCUS
1 <b>Scissortail Park (Downtown)</b>	\$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: 40-acre north section opened in September 2019; completion of the 30-acre south section expected in 2021.	Downtown	Recreation/entertainment, lifestyle amenities, and tourism
2 <b>Downtown Streetcar</b>	\$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 <b>Downtown Convention Center</b>	\$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 <b>Sidewalks</b>	\$18.1 million	Construction of new and improved sidewalks in areas with high demand for pedestrian amenities.	Underway; the current plan calls for 60 miles using \$9 million of additional City reserves.	City-wide	Transportation
5 <b>Trails</b>	\$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 2018.	City-wide	Recreation, health, lifestyle amenities, and transportation
6 <b>RIVERSPORT Rapids</b>	\$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 <b>Senior Health and Wellness Centers</b>	\$52 million	Construction of 4 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 2019 opening; fourth center 2021 opening. A fifth wellness center has been proposed.	(1) N. Rockwell; (2) S. Walker; (3) NE 23 <sup>rd</sup> & N. MLK; and (4) TBD	Health and lifestyle amenities
8 <b>Bennett Event Center</b>	\$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. The Center is designed for horse shows and other events.	State Fair Park	Recreation/entertainment and tourism
<b>Projected Total Cost</b>	<b>\$777 million</b>	Raised approximately \$805 million			

Source: City of Oklahoma City and Greater Oklahoma City Chamber

## MAPS (Metropolitan Area Projects)

The passage of the original MAPS projects on December 14, 1993 by 54% of voters ushered in a long-lived era of significant public capital improvement projects in Oklahoma City. The initial \$350 million program focused primarily on the revitalization of the core downtown area. Years of urban decay, demolition, and suburban migration, all exacerbated by the Oil Bust of the 1980s, weighed heavily on the continued viability of downtown as the core of civic life in the region. City leaders recognized the pivotal role played by substandard public facilities in the struggles of the city core and proposed the original MAPS projects as an initial step toward reversing the economic decline of the area.

**MAPS Projects.** The initial set of nine projects within MAPS is notable and includes several facilities that are now viewed as core city landmarks. Figure 4 summarizes the cost and economic development focus of the nine major projects.

Projects include 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 trolley system for transportation to/from downtown and the surrounding area. The 2009 MAPS report provides additional context concerning the economic development issues addressed by the projects.

The set of initial projects also highlights the relative lack of modern public amenities in the downtown area at the onset of MAPS. It further reflects the steep decline that had occurred in Oklahoma City's stature as the civic hub of the region and state. These projects dramatically altered the visible look of downtown and created a key set of new civic assets for Oklahoma City and the broader region to enjoy.

**Figure 4. Original MAPS Projects – Summary**

Project Type	Project Name	Cost	Economic Development Focus
Sports Arena	Chesapeake Energy Arena	\$87.7 million	Recreation/entertainment and tourism
Convention Center	Cox Convention Center Improvements	\$60.0 million	Public convention and meeting space, tourism
River System	Oklahoma River Redevelopment	\$53.5 million	Recreation/entertainment and tourism
Music Hall	Civic Center Music Hall Renovation	\$53.0 million	Civic/arts/entertainment and tourism
Ballpark	Chickasaw Bricktown Ballpark	\$34.0 million	Recreation/entertainment and tourism
Canal	Bricktown Canal	\$23.0 million	Recreation/entertainment and tourism
Library	Ronald J. Norick Downtown Library	\$21.5 million	Education
Fairgrounds	State Fairgrounds Improvements	\$14.0 million	Recreation/entertainment and tourism
Trolley	Oklahoma Spirit Trolleys	\$5.0 million	Transportation and tourism
<b>Total</b>		<b>\$350 million</b>	

Source: City of Oklahoma City and Greater Oklahoma City Chamber

The initial MAPS projects were funded through a 1 cent local sales tax beginning January 1, 1994. The tax was initially approved for five years and then extended in December 1998 by a vote of the people for an additional six months, reaching 66 total months.<sup>3</sup> The six-month sales tax extension dubbed 'Finish

MAPS Right' was viewed as a common-sense adjustment to the initial plan and passed with a 67% majority.

Direct collections totaled \$309 million while interest earnings provided an additional \$54 million. The sales tax expired on July 1, 1999, raising a cumulative total of \$363 million. Federal funds covered \$4.6 million of the cost of the trolley system.

**MAPS - Economic Development Characteristics.** The overarching theme of the initial MAPS projects was the revitalization of downtown Oklahoma City as the center of civic life in the greater Oklahoma City area. Externally, the efforts were intended to enhance the national image of the city and its fledgling status as a convention and tourism destination.

Six of the nine venues in MAPS have an entertainment component, including the arena, ballpark, river, music hall, canal, and fairgrounds. These new and upgraded public venues provided numerous opportunities for entertainment, recreation, and cultural and arts activities for both city residents and non-resident visitors.

Eight of the nine MAPS projects (not the public library) have an outward focus on increased tourism, by both in-state and out-of-state visitors. These new downtown public venues offered several attractive venues for visitors to make repeated visits to the area for entertainment and recreation.

The Chickasaw Bricktown Ballpark and Chesapeake Arena are directly related to fan-attended sporting events. The Ballpark was a modern replacement for the aging All Sports Stadium located at the state fairgrounds where prior professional teams played from 1962 to 1997. Professional baseball in Oklahoma City is traced back almost uninterrupted to 1904.<sup>4</sup> The new stadium has been ranked among the best minor league ballparks in the country.<sup>5</sup> The Oklahoma City Dodgers, the Triple-A affiliate of the Los Angeles Dodgers, are currently based in Oklahoma City and play their home games at the Ballpark.

The canal is now a centerpiece of the revitalization of Bricktown, which has become downtown's primary entertainment district. The formerly deteriorating area is home to continued private investment and sharply rising property values. Extensive redevelopment of existing structures from the historic warehouse district maintains its early roots in city history. A key aspect of the area's revitalization is the development of an extensive network of new hotels, retail vendors, and foodservice operators. Bricktown is also an active area for residential real estate development and increasingly office space development.

The completion of Chesapeake Arena was a key factor in the temporary relocation of the NBA's New Orleans Hornets to Oklahoma City for home games during the 2005-06 and 2006-07 seasons following Hurricane Katrina. The availability of newly constructed and NBA-suitable Chesapeake Arena coupled with the success of hosting an NBA franchise for two seasons in Oklahoma City ultimately contributed to the relocation of the Oklahoma City Thunder beginning with the 2008-09 season. The presence of the Thunder propelled Oklahoma City into the exclusive tier of cities with a major sports franchise. The Thunder are now viewed as a key lifestyle amenity for residents, with the team having drawn annual attendance at the full capacity of the arena annually since 2012.<sup>6</sup>

The Oklahoma River system has become an anchor recreational destination downtown. The seven-mile system of parks, greenways, trails, and recreational amenities provides riverfront activities for residents and visitors alike. The Boathouse District is home to Olympic-level rowing and whitewater venues that



place Oklahoma City among a group of elite destinations for training and competition. New permanent trails developed in MAPS 3 now connect distant areas of the metropolitan area to the Oklahoma River and downtown.

Convention center improvements addressed the limited role played by Oklahoma City in the national convention market. MAPS funding upgraded and extended the life of the aging and undersized Cox Convention Center by more than two decades. This improved conference venue provided the initial step in rebuilding the city's convention profile as early MAPS projects were marketed as new assets for conventioners visiting Oklahoma City. These efforts have since led to the groundbreaking on the construction of a nationally competitive conference center approved in MAPS 3 and adjacent Omni conference hotel.

The improvements at State Fair Park reflect the tightly woven role of agriculture and animal husbandry in the state economy, as well as the significance of the facility in-state entertainment and tourism. The success of these improvements led to the subsequent construction of the Bennett Event Center at State Fair Park in MAPS 3.

The trolley system is the only relatively small project among the initial MAPS efforts and the only project that is no longer active. The trolleys were decommissioned in 2010 at the end of their useful life.

The final project in the original MAPS initiative, the Ron J. Norick Downtown Library was completed in August 2004. The library serves the local community through traditional library services as well as providing computer access, meeting space, and online services. The library carries a largely educational focus and is designed to serve primarily city residents.

## MAPS for Kids

Prior to the completion of the original MAPS projects, voters approved funding for MAPS for Kids to provide a comprehensive overhaul to public education infrastructure in Oklahoma City. The \$694 million initiative passed on November 13, 2001 with a 61 percent majority, the largest among the three major MAPS programs to date.

**Infrastructure Crisis.** The Oklahoma City public school (OKCPS) system, the largest in the state, has faced numerous challenges in recent decades. These challenges include a long-term drop in enrollment (from approximately 75,000 in the late 1960s to only about 40,000 currently), demographic shifts<sup>7</sup>, issues attracting and retaining teachers, student performance challenges, aging facilities, and financial constraints. MAPS for Kids focused on remedying the last two of these long-standing challenges – aging facilities and financial constraints.

The revitalization of education infrastructure through MAPS for Kids was intended as a jumpstart for the Oklahoma City public school district, much like the original MAPS projects provided a jumpstart to downtown through the construction of core public infrastructure.<sup>8</sup> Project Kids, the foundational education reform effort leading to MAPS for Kids, focused on building a consensus among the City of Oklahoma City, Oklahoma City Public Schools, the District Board of Education and the Oklahoma Public Schools Foundation on reforms needed within the school district.<sup>9</sup>

Led by civic, business, and community leaders, Project KIDS noted several reforms needed to bring the district up to modern standards, including the foundational issues of distressed, outdated, and inefficient buildings and aging transportation and information technology infrastructure.

An overarching goal was to provide equal facilities to all schools in the district and eliminate any potential role that substandard facilities might play in the various challenges faced by the district. To the degree that substandard facilities contributed to enrollment and demographic shifts, school reconstruction would address these obstacles as well.

**Targeted Spending.** The original \$694 million budget for MAPS for Kids prioritized spending in four broad areas:

- \$470 million for OKC district school construction and renovation projects;
- \$52 million for information technology purchases and upgrades;
- \$9 million for transportation (primarily buses); and
- \$154 million split among 23 suburban school districts serving students living within the Oklahoma City limits.

Funding included \$514 million in city sales tax and a \$180 million bond issue. Project funds were earmarked for bondable expenditures such as buildings, equipment, and vehicles, but excluded ongoing operating expenses such as salary. The MAPS for Kids 1 cent sales tax expired in 2008 after raising the approved funds.

The initial 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 established within Project KIDS was to reduce the number of buildings operated by the district from

88 to 70. There are currently 72 structures operated by the district with plans to further streamline the number of buildings operated.

Plans included a new downtown elementary charter school - John W. Rex Elementary - completed in 2014.<sup>10</sup> In total, six new district schools were constructed using MAPS for Kids funding. Elementary schools include Cesar Chavez Elementary School, John W. Rex Elementary School, and Martin Luther King, Jr. Elementary School. New middle and high schools include Douglass Mid-High School, U.S. Grant High School, and John Marshall Enterprise Mid-High School.

The first major construction project at the new Douglas Mid-High School began in January 2004, and nearly all MAPS for Kids projects were fully completed by 2018. The city council terminated the OKC MAPS Trust, the governing body responsible for managing MAPS for Kids funds, in 2018.<sup>11</sup>

**Bond Funding Issues.** MAPS for Kids provided the funding to bring aging district facilities up to date after struggling for years to maintain the existing school system infrastructure. At the time of the MAPS for Kids vote in 2001, the age of buildings in the district averaged 57 years and many were deteriorating due to deferred maintenance. The average life expectancy for the buildings was 50 years. Excess capacity due to falling enrollment contributed to the maintenance and upkeep burden. The district's bus fleet was similarly extended well beyond its expected life and the information technology used across the district lagged far behind current standards.

The inability of the district to obtain bond funding approval from voters in prior years had long hampered the maintenance of buildings and the purchase of updated and upgraded equipment and vehicles in the district. In the three decades from 1970 to 1999, only four of ten school bond proposals were approved by district voters.<sup>12</sup> This compared to the passage of 36 bond proposals in Mid-Dell, 28 in Putnam City, and 41 in Edmond in the period. The district was forced to use operating funds to make capital improvements and perform ongoing repairs and maintenance, including the removal of asbestos from buildings.

Voter reluctance to support district bond issues shifted with the passage of MAPS for Kids. The Yes for Kids initiative in 2007 resulted in the passage (79% approval) of a \$248 million bond issue for site acquisition, building construction and renovation, equipment for new school facilities, and updated information technology and transportation equipment.<sup>13</sup> In the subsequent Yes to Yellow bond effort in 2016, voters approved (65% approval) bonds totaling \$180 million for maintenance, fine arts, athletics, information technology, and transportation needs.<sup>14</sup>

**School Quality and Living Choices.** A key economic development issue underlying MAPS for Kids is the role played by the quality of the school district in contributing to economic growth in the city. The MAPS for Kids initiative is based on the underlying premise that school quality and the decision of where to live are closely related. Project KIDS similarly recognized the role played by the quality of the school district and its aging facilities in the choice of families to live outside the Oklahoma City school district.

*"The Oklahoma City Public School District is not the first choice for many in our community who have school-aged children. For the past 30 years, families have chosen to leave our District or select other educational options."*

Project KIDS Report (2001)



A recent study of housing demand in Oklahoma City underscores the role played by the perceived quality of the school system in selecting where to live in the Oklahoma City metropolitan area.<sup>15</sup> The findings illustrate the degree to which school system quality affects regional development patterns across the city, particularly in the central portions and downtown. The results also confirm that an economic payoff in the form of greater population growth and residential development should be expected to accompany higher-quality schools in Oklahoma City.

Survey results from the report suggest that many of the city's households would leave suburban and rural areas surrounding Oklahoma City and move to more central portions of the city if school quality did not affect their decision where to live. Given equal schools, households reported being more likely to live in central Oklahoma City (+3.5% of city households), urban portions of northeast Oklahoma City (+1.5% of city households), and downtown (+2.1% of city households).

Residents reported being less likely to live in Edmond (-3.6%), rural areas to the northwest (-1.4% of city households), urban areas to the northwest (-1.4% of city households), and Moore-Norman (-0.6% of city households) if school quality was equal across the metropolitan area.

Households also reported a willingness to pay more for housing when selecting a place to live in exchange for higher-quality schools. Nearly 25 percent of households report they would be very likely to pay 10% more for housing to have higher quality schools. More than 80% reported being somewhat likely or very likely to pay 10% more. In testing the sensitivity of households' willingness to pay for better schools, approximately 10% of households reported they are very likely to pay a 20% premium in housing for better schools.

School quality also ranked as a higher priority than many other factors examined. A far higher share of city households reported a willingness to pay a premium for housing to have better schools than for having their commute time cut in half, the ability to walk to work, or the ability to walk to shops.

Willingness to pay more for higher quality schools is closely related to age, with younger households far more likely to pay more for better schools. More than one-third (34%) of households with an adult age 18 to 34 report they are very likely to pay 10% more for housing to have high-quality schools. The share reported for the younger age group is far more reflective of the behavior of a typical family with school-aged children than is the overall sample of households of all ages.

Schools are also cited as an important factor in the decision of households to move to a more urban or central location within Oklahoma City. While lower crime (24%), affordability (21%), and sense of place (14%) are listed as the most common responses, 12% of households surveyed reported schools as their number one concern when moving into a more central portion of the city.

Consistent with the premise underlying MAPS for Kids, the survey results support the notion that housing demand would be far greater in the central portions of the city, including downtown, with higher quality public education. To the extent that MAPS for Kids contributes to higher-quality schools, it should contribute to population growth, particularly in the central areas of the city. Young families with children are the most likely to respond to improved school quality.

**Suburban District Funding.** MAPS for Kids also recognized the need to address the educational facilities serving all children in Oklahoma City, regardless of the school district they attend. Thirty percent of MAPS for Kids funding, or \$155 million, was shared with the 23 suburban school districts situated within the Oklahoma City limits.

District payouts were based on the attendance shares of those children who resided in Oklahoma City but attended school outside the OKCPS district.

Total MAPS for Kids expenditures made within each suburban school district are detailed in Figure 5. Funding was available for use only in providing or improving public school facilities, which generally included construction, repairs, furnishings, equipment, and transportation.

Seven districts received more than \$5 million in project funding – Putnam City (\$46.4 million), Moore (\$32.8 million), Edmond (\$16.5 million), Mustang (\$13.8 million), Mid-Del (\$12.0 million), Western Heights (\$9.0 million), and Yukon (\$6.3 million).

Eight additional school districts received between \$1 million and \$5 million in projects – Crooked Oak (\$3.4 million), Deer Creek (\$2.9 million), Millwood (\$2.5 million), Piedmont (\$2.2 million), McCloud (\$1.8 million), Choctaw-Nicoma Park (\$1.5 million), Oakdale (\$1.2 million), and Jones (\$1.0 million).

The remaining eight districts – Banner, Crutchko, Harrah, Little Axe, Luther, Norman, Robin Hill, and Union City – each received less than \$1 million in MAPS for Kids funding.

**Figure 5. MAPS for Kids - Suburban School Districts**

School District	Proportionate Share of Sales Tax Revenue (2009)	Disbursements to Date Net of Returns
Banner	0.1%	97,084
Choctaw-Nicoma Park	1.1%	1,507,872
Crooked Oak	1.8%	3,433,929
Crutchko	0.0%	5,010
Deer Creek	2.6%	2,930,662
Edmond	11.9%	16,532,849
Harrah	0.1%	170,942
Jones	0.5%	1,044,575
Little Axe	0.5%	979,463
Luther	0.2%	285,300
McCloud	1.1%	1,763,633
Mid-Del	7.3%	11,997,103
Millwood	1.4%	2,460,986
Moore	21.6%	32,810,173
Mustang	9.1%	13,769,591
Norman	0.0%	37,018
Oakdale	0.9%	1,170,152
Piedmont	2.0%	2,214,054
Putnam City	27.4%	46,415,581
Robin Hill	0.1%	186,013
Union City	0.0%	24,165
Western Heights	5.7%	9,009,896
Yukon	4.7%	6,304,185
<b>Total - 23 Suburban Districts</b>	<b>100.0%</b>	<b>\$155,150,237</b>

Source: City of Oklahoma City - OKC Metropolitan Area Public Schools Trust

**District Restructuring.** MAPS for Kids allowed the Oklahoma City School District to accomplish other key operational goals during the project. These include an initial restructuring of attendance patterns to better match the changing location and demographic structure of the student population in the district and realigning grade band configurations.

Further restructuring efforts are currently underway within the district. Recently appointed Superintendent Sean McDaniel has stressed the need for the district to achieve even greater efficiency in the use of existing infrastructure. Estimates from the district suggest that currently only 60% of physical classroom capacity is utilized.<sup>16</sup> Most of the excess capacity is located at elementary schools,

with middle and high schools being utilized at a far higher rate.<sup>17</sup> The district also faces impending cuts in state aid in the next two budget years based on projected enrollment trends.

Extensive public hearings and discussions are underway to formulate recommendations for additional restructuring of building utilization patterns to better match district attendance trends. These efforts are part of the district's *Pathway to Greatness* project to redesign Oklahoma City public schools for the future.<sup>18</sup> Current proposals are to close or repurpose 15 existing facilities.<sup>19</sup> Objectives include lower class size for K to 6, more teacher support staff, increased full-time elementary counselors, science labs in every school, more available seats at successful programs, reduced overcrowding at selected schools, and better access to athletics, arts, and other co-curricular activities.

The potential closure of the least utilized buildings is under review along with changes to current school boundaries and the potential redeployment of district resources toward optimal uses. The district is also evaluating the prevalence of in-district transfers and the imbalances this can create in enrollment patterns. Discussions further include how to repurpose any closed buildings, particularly options for reuse as alternative community assets.

**A catalyst to Long-Run Reform.** These are the types of internal reforms that city leaders hoped would be triggered through MAPS for Kids upon updating the district's physical facilities and removing the financial burden of aging infrastructure. With better facilities in place, the follow-up step of streamlining facility use to better match changes in enrollment and educational programs is underway.

These changes also represent a significant catalyst toward achieving the overarching and long-run goal of better educational outcomes. Much like the other MAPS initiatives were intended to enable private investment to thrive, MAPS for Kids is now returning the focus within the system to education delivery and outcomes so children can thrive.



## MAPS 3

Public input was sought in 2007 for potential projects for a third MAPS initiative. The resulting \$777 million, 10-year building campaign was approved by voters on Dec. 8, 2009 with a 54% majority. MAPS 3 centered on major downtown capital projects but also included trails, sidewalks, and senior health and wellness centers throughout the city. The 1 cent MAPS 3 sales tax was renewed for seven years and nine months and expired in December 2017.

Figure 6 provides a summary of the eight major components of MAPS 3, along with the cost and economic development focus of each. The projects include a new downtown convention center, a major urban park (Scissortail Park), a downtown streetcar system, the Bennet Event Center at State Fair Park, rapids on the Oklahoma River, senior health and wellness centers, additions to the city-wide trail system, and significant sidewalk construction and repair.

**Figure 6. MAPS 3 Projects – Summary**

Type	Project	Cost	Economic Development Focus
Convention Center	Downtown Convention Center	\$288.0 million	Public convention and meeting space, tourism
City Park	Scissortail Park (Downtown)	\$132.0 million	Recreation/entertainment/lifestyle and tourism
Streetcar	Downtown Streetcar	\$131.0 million	Transportation
Event Center	Bennett Event Center	\$58.7 million	Recreation/entertainment and tourism
River Rapids	RIVERSPORT Rapids	\$57.0 million	Recreation/entertainment and tourism
Wellness Centers	Senior Health & Wellness Centers	\$52.0 million	Health and lifestyle amenities
Trails	Trail System	\$39.5 million	Recreation/entertainment/lifestyle/transportation
Sidewalks	Sidewalk Construction/Repair	\$18.1 million	Transportation
<b>Total – MAPS 3</b>		<b>\$777 million</b>	

Source: City of Oklahoma City and Greater Oklahoma City Chamber

## MAPS 3 Project Status

Three MAPS 3 projects have been completed to date - RIVERSPORT Rapids on the Oklahoma River in 2016, the 200,000-square-foot Bennet Event Center at State Fair Park in 2017, and the downtown streetcar in late 2018.

**RIVERSPORT Rapids.** The Riversport Adventure Park is a unique outdoor urban adventure park situated along the MAPS-funded Oklahoma River in the Boathouse District. Adventure parks are also now located at Lake Overholser and Lake Hefner. Recreational activities include whitewater rafting, tubing, adventure courses, ZIP lines, high-speed slides, extreme jumping, climbing walls, pump tracks, sailing, flatwater kayaking, and stand up paddleboarding.

**Bennett Event Center.** The Bennett Event Center at State Fair Park was completed in 2017 as the largest event space in Oklahoma City. The Center is the primary component of the MAPS 3 Oklahoma State Fairgrounds Improvement project. The Center is designed to host the city's numerous horse shows and other events held at State Fair Park. The project includes a new 279,000-square-foot exhibition hall with 201,000 square feet of contiguous exhibition space, 12,000-square-foot lobby, a 10,000-square-foot

commercial catering kitchen, and improvements to parking and other infrastructure at State Fair Park. The building is located on the former site of the Travel and Transportation building.

**Downtown Streetcar.** The new modern downtown streetcar serves as an urban circulator and connector linking Midtown, the Business District, Scissortail Park and Bricktown. Regular service commenced in December 2018. The streetcar provides a link between all major MAPS venues and easy access to most major government, business, recreation, and entertainment destinations downtown. A later section of the report provides a detailed overview of the system, including shifts underway in economic and demographic characteristics of the blocks surrounding the streetcar path.

All remaining MAPS 3 projects are underway and at various stages of completion as follows:

**Scissortail Park.** Scissortail Park is part of the city’s Core-to-Shore initiative to develop the area south of downtown to the Oklahoma River. The urban park is approximately 70 acres and links downtown and the Oklahoma River by way of Skydance Bridge over I-40. Planned components of the park include a cafe, lake, gardens, fountains, performance venues and a grand lawn. The north portion of Scissortail Park opened in September 2019 while the south section is slated for a 2021 opening. The park will provide a major urban amenity to downtown residents and visitors alike.

**Downtown Convention Center.** A new convention center is seen as vital to attracting larger conventions and increased tourism to Oklahoma City. The convention center is the largest of the MAPS 3 projects and will be located adjacent to both Scissortail Park and the newly announced Omni conference hotel. Construction is underway, and completion is expected in 2020 with the hotel opening in early 2021.

**Sidewalks.** MAPS 3 also called for the construction of 70 miles of new and improved sidewalks in areas with a high demand for pedestrian amenities. The original budget of \$9.2 million was increased to \$18 million due to cost estimates that exceeded original projections. The majority of the MAPS 3-funded sidewalks will be complete by the end of 2019.

**Trails.** An additional outdoor amenity within MAPS 3 is the construction of 50 miles of paved trails linking downtown and the Oklahoma River with Lake Overholser, Lake Hefner, and Lake Draper. The West River Trail (Overholser) was completed in 2015; the Will Rogers Trail (Hefner) was completed in 2018; and the Lake Draper Trail began construction in March 2018.

**Senior Health and Wellness Centers.** Current plans call for the 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. The N. Rockwell Avenue center opened in 2017. The second center at S. Walker Avenue opened in 2018. The third and fourth MAPS 3 Senior Health and Wellness Centers will be in northeast and far southwest Oklahoma City, with Langston University and the YMCA of Greater Oklahoma City as operating partners, respectively. The third and fourth centers are currently being planned.

All currently active MAPS 3 projects are scheduled for completion by 2021.

## Related City Development Efforts

In addition to the three MAPS initiatives, Oklahoma City has engaged in other major non-MAPS investments aimed at improving city infrastructure and quality of life for residents.

**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. The bonds replaced an existing expiring bond issue, and all provisions passed with at least 78% of the vote.

**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 bridge also connects the north and south sections of Scissortail Park. Funding for the realignment project was approved in May 2002 and construction was completed in October 2012. The \$688 million project 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. More importantly, Core to Shore is deeply integrated into both the MAPS and MAPS 3 projects as well as the I-40 realignment downtown. River redevelopment was a key component of the initial MAPS projects, but the area remained largely inaccessible directly from downtown. The completion of the Skydance Pedestrian Bridge spanning I-40 provided the key connection stretching from the riverfront and south section of Scissortail Park to the north portion of the Park and the city core. The Core-to-Shore area is also home to the new MAPS 3-funded state-of-the-art convention center and Omni Oklahoma City Hotel. The OKC Streetcar will provide service through two loops that overlap service at the north tip of Scissortail Park. 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 open and development along the new route is brisk. The plan further called for the strengthening of the existing residential community and the use of multi-use development strategies to improve all phases of urban life in the Core-to-Shore region.

**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 the area's appearance and make the central core more pedestrian-friendly. The project was a component of the Tax Increment Financing (TIF) district tied to the construction of the Devon headquarters building in the Business District. Plans called for the addition of landscaping, public art, bike lanes, decorative street lighting and additional on-street parking.

**Better Streets, Safer City.** Approved on Sept. 12, 2017, by voters, the Better Streets, Safer City program included 13 bond propositions and two sales tax initiatives that invested in streets, police and fire facilities, parks and other basic needs. Better Streets, Safer City 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.<sup>20</sup>

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.<sup>21</sup> The 2017 bond succeeded the bond program passed in 2007. Initiatives include streets and sidewalks (\$491 million), traffic control (\$28 million), bridges (\$27 million), parks and recreation (\$138 million), drainage control (\$62 million), economic and community development (\$60 million), fire (\$45 million), police (\$31 million), libraries (\$24 million), transit (\$20 million), civic center complex and city buildings (\$20 million), city maintenance facilities (\$13 million), and downtown arena (\$9 million).<sup>22</sup>

The final component is a permanent one-fourth cent sales tax rate increase to support increased public safety. The funds are intended to hire 129 more police officers and 57 more firefighters. The tax will generate an estimated \$26 million annually to the general fund. The city sales tax rate increased from 3.875% to 4.125% on January 1, 2018, which, along with the state share of 4.5%, pushes the total rate to 8.625%. This represents the first permanent increase in the general sales tax rate in Oklahoma City since 1976.

**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, and in September, City Council called for a MAPS 4 vote on Dec. 10, 2019. If passed, the MAPS 4 program would include 16 projects addressing Oklahoma City's human needs, jobs and economy, neighborhood needs, and quality-of-life issues. Keeping the tradition of past MAPS programs, MAPS 4 would make transparent debt-free investments in transformational projects designed to move Oklahoma City forward.

### III. MAPS Impact (Goals, Geography and Measurement)

The 2009 MAPS report focused on evaluating change within the core downtown area of central Oklahoma City. Most of the initial MAPS projects and most MAPS 3 projects are similarly focused on development downtown. For consistency with the 2009 report, the same general downtown study area is used to evaluate changes triggered by MAPS development. Changes include both economic and demographic characteristics associated with both public and private investment over the past 25 years. This section describes the general downtown study area used throughout the remainder of the report along with combinations of Census tracts and ZIP codes used to form highly localized estimates of activity within the study area.

#### Downtown Market

Figure 7 illustrates the general downtown market area encompassing most of the MAPS spending to date. 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 study 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. By major district, the study area captures the Business District, Bricktown, Boathouse District, Film Row, Arts District, Mesta Park, Heritage Hills, Midtown (including St. Anthony Hospital), Automobile Alley, Research Park and the Medical Community (including OU Health Sciences Center).

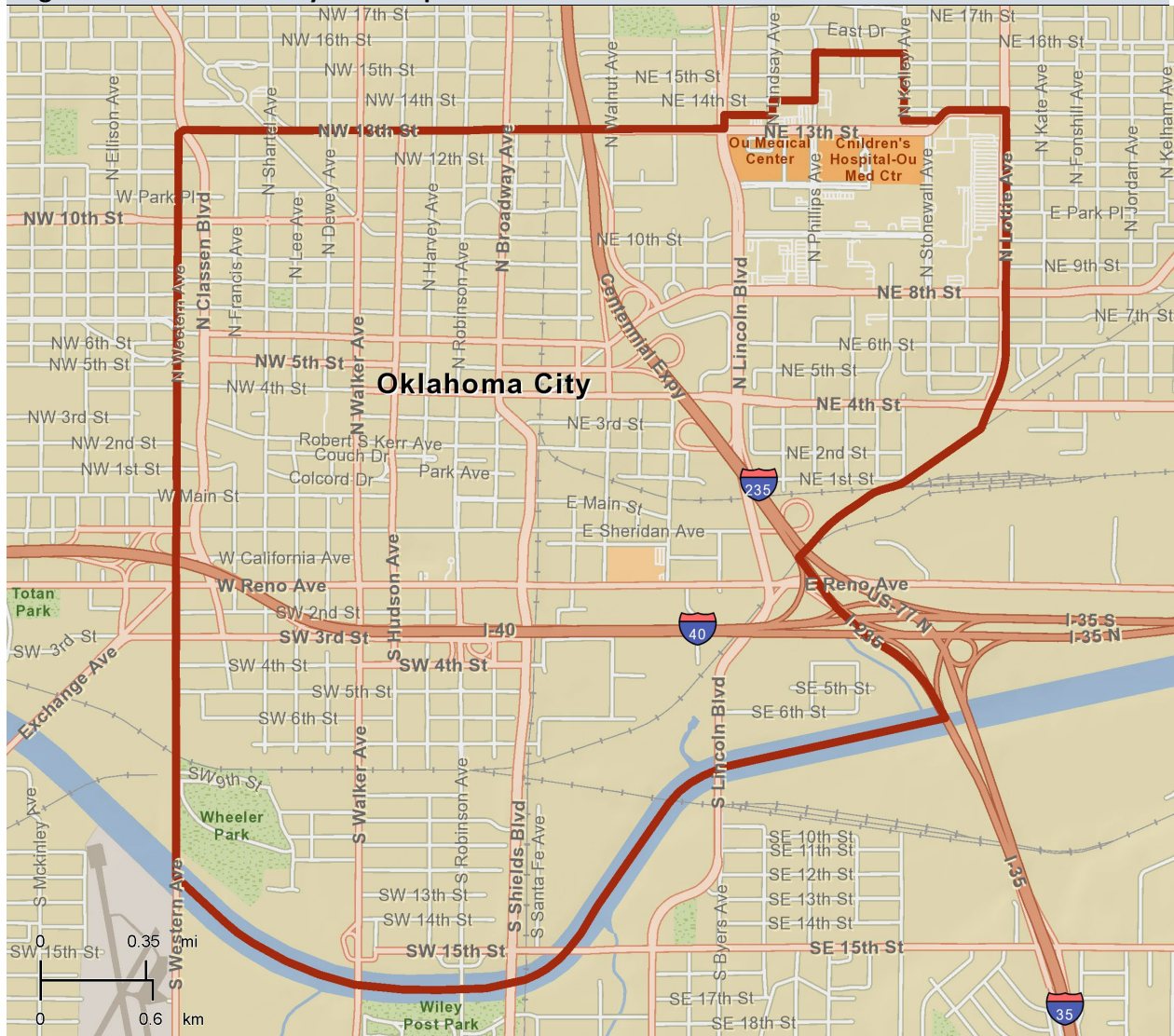
Relative to the 2009 MAPS report, the Riverside district south of I-40 and stretching to the Oklahoma River is added to the study area. This new area is a component of the Core-to-Shore initiative and includes south Scissortail Park along with some housing and light commercial activity.

**Measuring Activity in the Downtown Study Area.** Public databases of economic and demographic data generally do not correspond to the exact boundaries of the general downtown market area shown in Figure 7. Combinations of Census tracts or ZIP codes are typically used to provide approximate coverage for the region. In choosing between Census tracts and ZIP codes, the greatest granularity is often achieved with the use of (smaller) Census tracts, while more detailed data sources are often available using (larger) ZIP codes as the underlying geography.

Where possible in the report, we form unique tabulations of the underlying data to best match the specific need at hand. With the streetcar project, for example, a third measure of the study area is used which encompasses a three-block area around the streetcar path.

**Study Area – Census Tracts.** Census tracts provide the means for detailed data analysis within small geographic subdivisions. Tracts are defined to capture between 1,200 and 8,000 residents, averaging about 4,000 residents across all tracts nationally. Tracts provide a detailed view of the component areas of downtown using the broad range of data available in the Census Bureau’s American Community Survey (ACS). Figure 8 describes the 14 Census tracts used throughout the report to measure change in the downtown study area. The tracts are consistent with those in the 2009 report plus tract 1040 located south of downtown between I-40 and the Oklahoma River.<sup>23</sup> A map of the 14 downtown area tracts is provided in Figure 9.



**Figure 7. Downtown Study Area Map**

Source: Greater Oklahoma City Chamber

The combined tracts extend slightly farther north than the general downtown area in Figure 7 but correspond closely to the remaining portions of downtown. The combined tracts in the study area stretch from near South 15th Street on the southern end of the study area to North 23rd street on the northern end. The west side of the study area is bordered by Western Avenue and the east by Bryant Avenue.

The three northernmost tracts used in the report – 1016, 1017, and 1018 – are more heavily residential and, as a result, more densely populated. The ten southern tracts encompass more of the central business district and have less residential presence.

Tract 1038 (Bricktown and Deep Deuce) is more mixed-use in nature, with both a large commercial and residential presence. Much of the land area in Tract 1040 (south of I-40 to Oklahoma River) is currently under preparation for the construction of south Scissortail Park.

**Figure 8. Downtown Study Area Census Tract Boundaries**

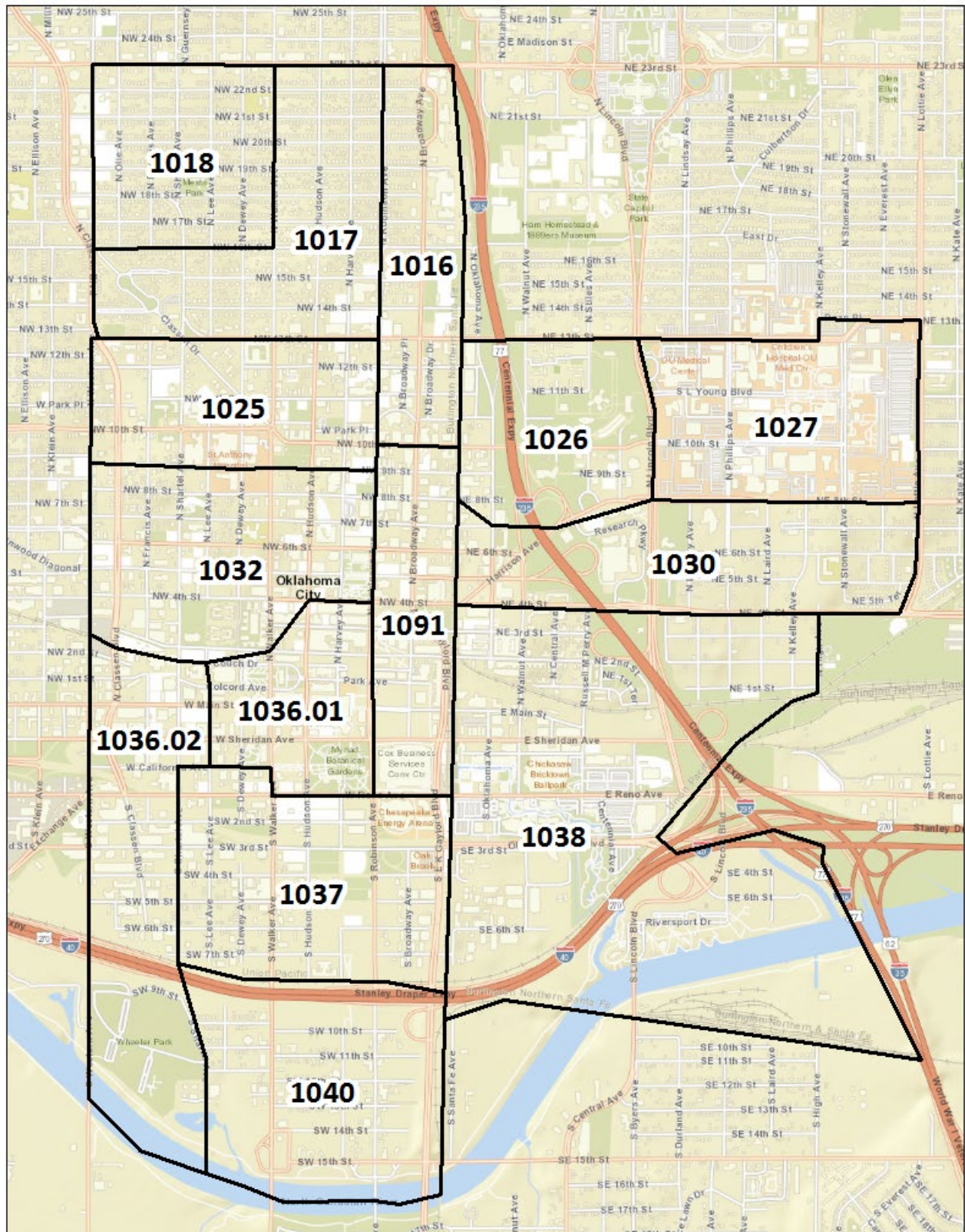
<b>Census Tract</b>	<b>Approximate Boundaries</b> (North to South, West to East)	<b>Approximate Location in Study Area</b> <b>N/S by E/W</b> (North-N, South-S, Central-C, East-E, West-W)	<b>Selected Features</b>
<b>1016</b>	NW 23rd to NW 10th between Robinson and Santa Fe	NW	Mixed-use, Byron's Liquor Warehouse, Aberdeen Properties
<b>1017</b>	(L-shaped) NW 23rd to NW 13th between Walker and Robinson; NW 16th to NW 13th between Western and Walker	NW	Heritage Hills
<b>1018</b>	NW 23rd to NW 16th between Western and Walker	NW	Mesta Park
<b>1025</b>	NW 13th to NW 9th between Western and Robinson	CW	St. Anthony Hospital, Bone & Joint Hospital
<b>1026</b>	NE 13th to NE 8th between Santa Fe and Lincoln	CC	Oklahoma School of Science and Mathematics, Oklahoma Department of Commerce
<b>1027</b>	NE 13th to NE 8th between Lincoln and Lottie	CE	North part of Oklahoma Health Center; University of Oklahoma Health Sciences
<b>1030</b>	NE 8th to NE 4th between Santa Fe and N. Lottie	CE	South part of Oklahoma Health Center, Presbyterian Health Found. Research Park
<b>1091</b> (Formerly 1031.01 & 1031.02)	NW 10th to Reno between Robinson and Santa Fe	CC	Automobile Alley and Downtown including Cox Convention Center
<b>1032</b>	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
<b>1036.01</b>	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
<b>1036.02</b>	NW 2nd Street and Couch Drive to Oklahoma River between N Western and Lee/Shartel	SW	Police Department and Municipal Courts, Wheeler Park
<b>1037</b>	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
<b>1038</b>	NE 4th to Union Pacific tracks between Santa Fe and I-35 ramp	SE	Bricktown and Deep Deuce
<b>1040</b>	I-40 to Oklahoma River between Shartel and Shields/Santa Fe	SC	South Scissortail Park to Oklahoma River

**Census Tract – Five-Year Estimates.** Census data published at the tract level provide for rich demographic and economic analysis in small regions. However, Census ACS data published at the tract level uses a five-year survey period in creating the most recent annual estimate. For example, estimates for 2017 are formed using surveys conducted from 2013 to 2017. This approach is used in tracts and other small regions including Census blocks, small towns, and counties to offset the potential loss of precision from surveys using relatively small samples in a single year.

While five-year data provide for more reliable estimates of the composition and structure of activity in a small region, they also result in a lag in capturing change taking place in the most recent reporting periods. The five-year data will, however, typically provide a conservative estimate of the pace of change in the most recent time periods examined. There is also considerable variability in sample-based ACS point estimates at the Census tract level and can carry a significant margin of error.



### Figure 9. Downtown Study Area – Census Tract Map



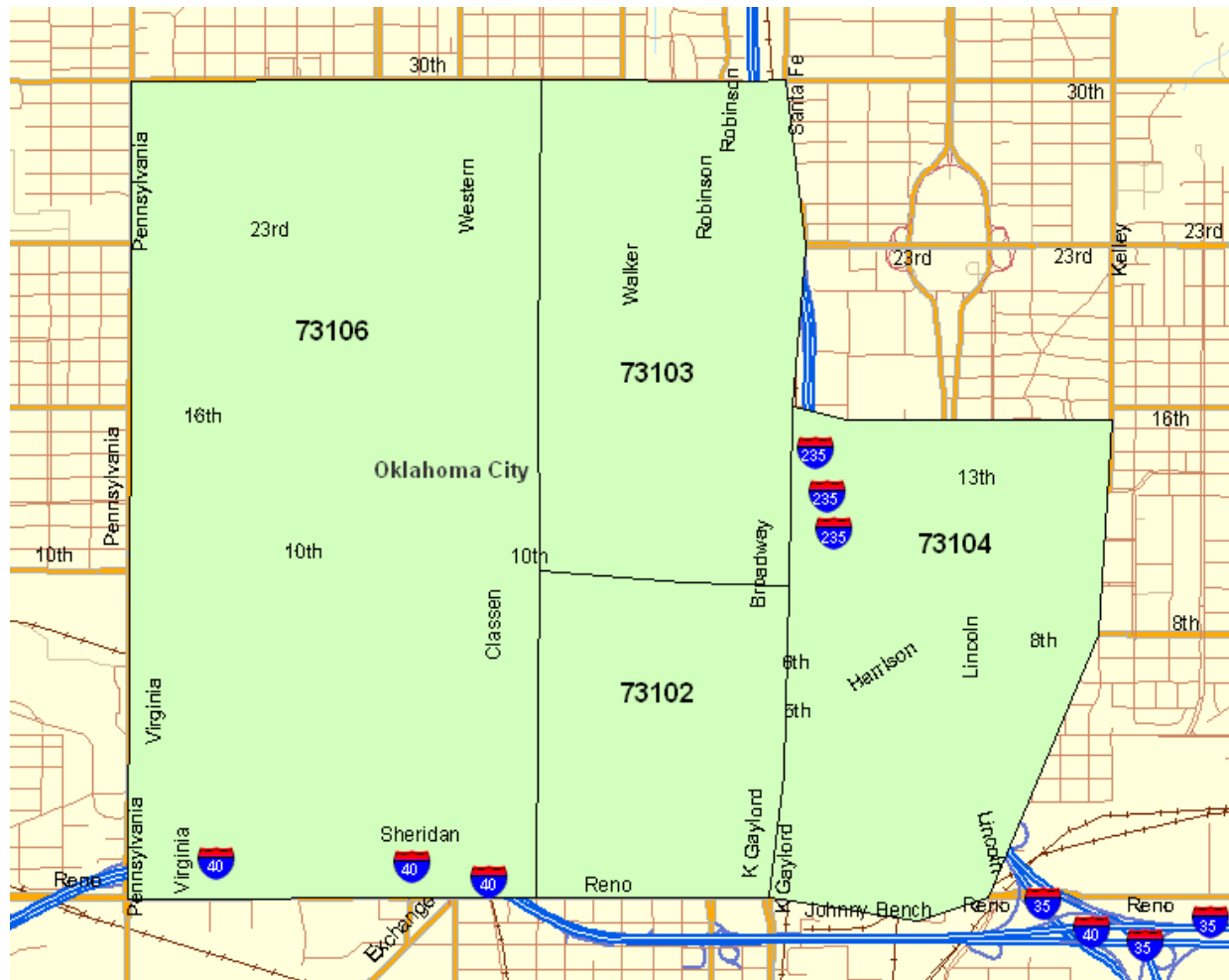
Source: Greater Oklahoma City Chamber

**Study Area–ZIP Codes.** ZIP codes are also used in the report to utilize available federal datasets that are structured along ZIP code tabulation areas (ZCTAs) rather than Census tracts. ZCTAs closely match postal ZIP codes in most areas and provide an additional means for decomposing a broader region into smaller localized areas. Census ACS data is generally tabulated by both Census tract and ZCTA. Throughout the remainder of the report, ZCTAs are referred to simply as ZIP codes.

The downtown study area is typically defined using four ZIP codes – 73102, 73103, 73104, and 73106. The general borders of the combined area are shown in Figure 10 and include Pennsylvania Avenue to the west, 30<sup>th</sup> Street to the north, Reno Avenue to the south, and just east of I-235 to the east. ZIP code 73104 extends east of I-235 to capture the OU Health campus.

Three of the four ZIP codes – 73102, 73103, and 73104 – are closely aligned with areas covered by the basic downtown study area shown in Figure 7. ZIP code 73102 is closely aligned with the central business district; 73103 is centered over Uptown; and 73104 includes the OU Health campus and Bricktown.

**Figure 10. Downtown Study Area – ZIP Code Tabulation Area (ZCTA) Map**



Source: Greater Oklahoma City Chamber of Commerce

ZIP code 73106 is the least consistent with the basic downtown study area in Figure 7. It extends farther west of downtown and captures additional Census tracts. The effects of capturing these additional areas are mitigated by the location of the densest development falling within the general boundaries of the basic downtown area. The slightly wider geography is not believed to alter any conclusions drawn about the economic profile of the downtown area. Some comparisons of ZIP code-based analysis with Census tract analysis are available in the report.



## IV. Downtown Study Area Demographic Change

If MAPS projects are successful in revitalizing the downtown area, they should trigger several visible and measurable demographic and economic changes in downtown. This section of the report serves as a follow-up to the 2009 report by evaluating the degree to which changes in these factors have taken place in the downtown study area. Trends are examined across a range of factors including population, housing, education, household income, and the downtown workforce.

Findings suggest the downtown study area experienced significant acceleration in population growth and housing development since about 2010. Growth in the downtown study area has generally far outpaced the county, metro area, and state on most measures in the period.

### Population Trends

**Weak Population Gains 1990-2010.** A key anticipated byproduct of downtown revitalization is a jumpstart to both lagging population gains and a weak housing market downtown. Prior to MAPS, downtown had experienced a weak long-run population trend and struggled with an aging housing market experiencing little redevelopment or new construction.

Figure 11 highlights long-run changes in population in the downtown study area. In 1990, prior to the start of MAPS, population in the 14 tracts in the study area totaled only 9,300 persons. Across the decade of the 1990s, population increased only 7.0% (651 persons) and trailed well behind the 10.1% gain countywide and 9.7% gain statewide in the period. The underperformance continued in the decade of the 2000s as downtown population growth slowed to 5.2% (515 persons), trailing county and state gains of 8.8%.

**Accelerated Population Gains After 2010.** As a result of MAPS, a rebound in population growth in the downtown area was expected to be closely intertwined with increased housing development. Since 2010, marked acceleration in population growth has taken place downtown. Between 2010 and 2017, population in the study area increased by 20.8% (2,168 persons), more than double the 7.7% gain for the county and four-fold the 4.6% gain for the state in the period. Because all Census data at the tract level are based on a five-year survey, the 2017 estimate understates actual population growth in the most recent years reported.

Total population in the 14 Census tracts in the study area reached a reported 12,603 persons in 2017, up by nearly 2,200 since 2010 and approximately 3,300 (36% gain) since 1990.

Almost three-fourths (9,132 persons) of downtown residents in 2017 live in the ten south Census tracts in the study area. Since 2010, much of the recent net population growth occurred in tracts 1032 (National Memorial and County Jail, 1,434 new residents) and 1038 (Bricktown and Deep Deuce, 420 new residents).

Tract 1032 had the most influence on study area population and is heavily influenced by the number of residents living in group quarters, particularly those in the County Jail and in homeless shelters. Because of this influence, estimates of group quarters residents in the study area are evaluated in the next section. Population estimates adjusted for residents in group quarters are then prepared and discussed in the following section.

**Figure 11. Population Growth by Census Tract**

Census Tract	Population				Change			Percent Change		
	1990	2000	2010	2017 Estimate	1990-00	2000-10	2010-17	1990-00	2000-10	2010-17
1016	481	512	466	355	31	-46	-111	6.4%	-9.0%	-23.8%
1017	1,203	1,192	1,199	1,241	-11	7	42	-0.9%	0.6%	3.5%
1018	1,351	1,453	1,416	1,602	102	-37	186	7.5%	-2.5%	13.1%
<b>North Tracts</b>	<b>3,035</b>	<b>3,157</b>	<b>3,081</b>	<b>3,198</b>	<b>122</b>	<b>-76</b>	<b>117</b>	<b>4.0%</b>	<b>-2.4%</b>	<b>3.8%</b>
1025	647	502	542	713	-145	40	171	-22.4%	8.0%	31.5%
1026	420	360	437	702	-60	77	265	-14.3%	21.4%	60.6%
1027	142	72	130	99	-70	58	-31	-49.3%	80.6%	-23.8%
1030	983	901	358	373	-82	-543	15	-8.3%	-60.3%	4.2%
1091*	255	212	251	202	-43	39	-49	-16.9%	18.4%	-19.5%
1032	1,613	2,979	3,498	4,865	1,366	519	1,367	84.7%	17.4%	39.1%
1036.01	630	336	226	193	-294	-110	-33	-46.7%	-32.7%	-14.6%
1036.02	229	432	704	663	203	272	-41	88.6%	63.0%	-5.8%
1037	452	468	514	260	16	46	-254	3.5%	9.8%	-49.4%
1038	443	155	467	1,062	-288	312	595	-65.0%	201.3%	127.4%
<b>South Tracts</b>	<b>5,814</b>	<b>6,417</b>	<b>7,127</b>	<b>9,132</b>	<b>603</b>	<b>710</b>	<b>2,005</b>	<b>10.4%</b>	<b>11.1%</b>	<b>28.1%</b>
1040	420	346	227	273	-74	-119	46	-17.6%	-34.4%	20.3%
<b>All Tracts</b>	<b>9,269</b>	<b>9,920</b>	<b>10,435</b>	<b>12,603</b>	<b>651</b>	<b>515</b>	<b>2,168</b>	<b>7.0%</b>	<b>5.2%</b>	<b>20.8%</b>
<b>Oklahoma County</b>	<b>599,611</b>	<b>660,448</b>	<b>718,633</b>	<b>774,203</b>	<b>60,837</b>	<b>58,185</b>	<b>55,570</b>	<b>10.1%</b>	<b>8.8%</b>	<b>7.7%</b>
<b>Oklahoma</b>	<b>3,148,825</b>	<b>3,454,365</b>	<b>3,759,603</b>	<b>3,930,864</b>	<b>305,540</b>	<b>305,238</b>	<b>171,261</b>	<b>9.7%</b>	<b>8.8%</b>	<b>4.6%</b>

Source: U.S. Census Bureau

Notes: Estimates for 1990, 2000, and 2010 are from the Decennial Census. Estimates for tracts in 2017 are from the American Community Survey 5-Year survey. Estimates for Oklahoma County are from the 2017 vintage of county population estimates.

\* Tract 1091 is a combination of the former downtown tracts 1031.01 and 1031.02 used in the 2009 MAPS report.

**Influence of Group Quarters.** Residents living in group quarters since 2000 are detailed by Census tract in Figure 12. Consistent survey data on group quarters residents do not extend back to 1990.

In 2017, approximately 4,800 (39%) of the current 12,600 downtown residents were reported as living in group quarters. These arrangements include *institutional* facilities such as correctional facilities, nursing homes, and mental hospitals as well as *non-institutional* facilities including college dormitories, military barracks, group homes, missions, and shelters.

Changes in the number of residents in group quarters also explain a significant share of the reported population gains in the study area since 2010. Of the 2,168 new residents in the period, approximately half (1,157 persons, 53%) reportedly live in group quarters. These group quarters residents are mostly located in tract 1032 (3,655 persons) where the County Jail along with several missions and shelters are located.

Approximately two-thirds of the group quarters residents in tract 1032 are believed inmates, with the remaining one-third in missions and shelters. The 145 persons reported in group quarters in tract 1026 reflect students residing in dormitories at the Oklahoma School of Science and Mathematics.

The estimate of total residents in group quarters in 2017 represents a sharp rise over recent years but is likely far overstating current numbers. Most recently at year-end 2017, reports indicate a population of only 1,560 inmates housed at the County Jail, a record low for the facility, down from 2,427 inmates at

the beginning of the year.<sup>24</sup> For comparison, average annual jail population was reported as 2,300 persons annually from 2000 to 2015.<sup>25</sup>

**Figure 12. Downtown OKC Population in Group Quarters by Census Tract**

Census Tract	Population 2000	Population 2010	Estimated Population 2017	Change 2000-10	Change 2010-17	Percent Change 2000-2010	Percent Change 2010-2017
1016	24	0	0	-24	0	-100.0%	-
1017	0	0	0	0	0	-	-
1018	0	5	9	5	4	-	80.0%
<b>North Tracts</b>	24	5	9	-19	4	-79.2%	80.0%
1025	43	122	54	79	-68	183.7%	-55.7%
1026	0	134	136	134	2	-	1.5%
1027	67	0	46	-67	46	-100.0%	-
1030	0	0	0	0	0	-	-
1091	0	80	0	80	-80	-	-100.0%
1032	1,972	2,229	3,675	257	1,446	13.0%	64.9%
1036.01	312	11	0	-301	-11	-96.5%	-100.0%
1036.02	377	657	635	280	-22	74.3%	-3.3%
1037	212	400	240	188	-160	88.7%	-40.0%
1038	0	0	0	0	0	-	-
<b>South Tracts</b>	2,983	3,633	4,786	650	1,153	21.8%	31.7%
1040	0	0	0	0	0	-	-
<b>All Tracts</b>	3,007	3,638	4,795	631	1,157	21.0%	31.8%

Source: U.S. Census Bureau

Notes: Estimate for 2000 is from the Decennial Census. Estimates for 2010 and 2017 are from the American Community Survey (5-year estimates).

Ongoing criminal justice reform efforts are likely to continue to reduce the influence of incarcerated persons at the County Jail on downtown population estimates.<sup>26</sup> The Greater Oklahoma City Chamber's Criminal Justice Task Force recently endorsed several recommendations designed to ease overcrowding conditions at the jail and improve the efficiency and effectiveness of the criminal justice system.<sup>27</sup> These include efforts to reduce jail time for those who have committed municipal violations, drug offenders, and those with untreated mental health concerns.<sup>28</sup> In fiscal year 2018, the City reported that the number of inmates who were sent to jail on municipal charges was down 22% from the prior year and down 42% from the number reported in fiscal year 2015.<sup>29</sup>

**Non-Group Quarters Population Estimates.** Population estimates since 2000 adjusted for group quarters in each Census tract in the study area are detailed in Figure 13. The estimates suggest weaker than reported total population growth from 2000 to 2010. While unadjusted population data suggest an increase of more than 500 residents in the decade between 2000 and 2010, adjusted estimates instead reveal a decline of 1.7% in the period, or a loss of 116 non-group quarters residents.

However, since 2010, adjusted estimates suggest substantial acceleration in population growth. Between 2010 and 2017, more than 1,000 new residents (14.9% gain) not living in group quarters were

added in the downtown study area. This is roughly twice the growth rate reported for the county (7.7%) and more than triple the growth at the state level (4.6%) in the period.

**Figure 13. Group Quarters-Adjusted Downtown Population by Census Tract**

Census Tract	Population 2000	Population 2010	Estimated Population 2017	Change 2000-10	Change 2010-17	Percent Change 2000-2010	Percent Change 2010-2017
<b>1016</b>	488	466	355	-22	-111	-4.5%	-23.8%
<b>1017</b>	1,192	1,199	1,241	7	42	0.6%	3.5%
<b>1018</b>	1,453	1,411	1,593	-42	182	-2.9%	12.9%
<b>North Tracts</b>	<b>3,133</b>	<b>3,076</b>	<b>3,189</b>	<b>-57</b>	<b>113</b>	<b>-1.8%</b>	<b>3.7%</b>
<b>1025</b>	459	420	659	-39	239	-8.5%	56.9%
<b>1026</b>	360	303	566	-57	263	-15.8%	86.8%
<b>1027</b>	5	130	53	125	-77	2500.0%	-59.2%
<b>1030</b>	901	358	373	-543	15	-60.3%	4.2%
<b>1091</b>	212	171	202	-41	31	-19.3%	18.1%
<b>1032</b>	1,007	1,269	1,190	262	-79	26.0%	-6.2%
<b>1036.01</b>	24	215	193	191	-22	795.8%	-10.2%
<b>1036.02</b>	55	47	28	-8	-19	-14.5%	-40.4%
<b>1037</b>	256	114	20	-142	-94	-55.5%	-82.5%
<b>1038</b>	155	467	1,062	312	595	201.3%	127.4%
<b>South Tracts</b>	<b>3,434</b>	<b>3,494</b>	<b>4,346</b>	<b>60</b>	<b>852</b>	<b>1.7%</b>	<b>24.4%</b>
<b>1040</b>	346	227	273	-119	46	-34.4%	20.3%
<b>All Tracts</b>	<b>6,913</b>	<b>6,797</b>	<b>7,808</b>	<b>-116</b>	<b>1,011</b>	<b>-1.7%</b>	<b>14.9%</b>

Source: U.S. Census Bureau

Notes: Estimates for 2000 are from the Decennial Census. Estimates for 2010 and 2017 are from the American Community Survey (5-Year estimates).

An adjusted total of 7,808 persons not living in group quarters was reported as residing in the downtown study area in 2017. Again, this estimate likely understates the actual 2017 adjusted total given the tendency of 5-year Census estimates to lag in response to changes in the most recent years, especially during periods of rapid growth.

About 90% of new non-group quarters residents (+898 persons) reside in the group of ten southern tracts plus newly-added tract 1040 south of I-40 (see Figure 13). The remaining 10% (+113 persons) are found in the three northern mostly-residential tracts, with the largest gain (+182 persons) occurring in tract 1018 (Mesta Park).

Across the full 2000 to 2017 period evaluated, the greatest number of new non-group quarters residents are found in tract 1038 (+907, Bricktown and Deep Deuce). Other areas adding more than 100 new residents include tract 1018 (+140, Mesta Park), tract 1025 (+200, St. Anthony Hospital), tract 1026 (+206, Department of Commerce), tract 1032 (+183, National Memorial and County Jail), and tract 1036.01 (+169, Myriad Gardens and Civic Center).

The greatest declines in non-group quarters residents are a loss of 528 residents in tract 1030 (South OU Health Center) and 236 residents in tract 1037 (Union Station).

## Age and Sex Distribution

A comprehensive profile of residents in the study area by age in each Census tract is reported in Figure 14. Residents in the study area have a relatively low 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 area is down slightly from 34.3 years in 2010.

Most residents under 18 years of age live in two of the heavily-residential northern tracts (1017 and 1018) and in tract 1026 (Department of Commerce) in the more central portion of the study area.

The median age is lowest (19.4 years) in tract 1026, home to a residential high school, and in tract 1040 (18.9 years) stretching south of I-40 to the Oklahoma River.

Four southern tracts with a far higher median age include tract 1025 (St. Anthony Hospital, 43.1 years), tract 1091 (Automobile Alley to Cox Center, 60.5 years), tract 1036.02 (Police Department and Courts, 46.7 years), and tract 1037 (Union Station, 52.8 years).

The age dependency ratio is a summary measure of the relative size of the typical working-age population group relative to those age groups (both younger and older) typically not working. The measure is defined by dividing the combined number of persons who are either under 18 years of age or ages 65 years and over by the number of persons ages 18-64 years and multiplying by 100. A higher dependency ratio suggests that a region has a greater share of the non-working population dependent upon the working-age population ages 18-64.

The overall age dependency ratio of 27.6 for the study area is far lower than the national ratio of 60.8, the state ratio of 64.7, and the county ratio of 62.4. This suggests far fewer residents outside the traditional working ages in the study area.

Only tracts 1026 (112.7, Department of Commerce) and 1040 (123.8, South of I-40 to Oklahoma River) have an elevated age dependency ratio, suggesting a higher share of non-working age residents. The high ratio in tract 1026 reflects in part the dormitory residents at the Oklahoma School of Science and Mathematics. The high ratio in tract 1040 reflects nearly half of residents falling under the age of 18.

Several tracts to the south – 1032, 1036.01, 1036.02, 1037, and 1038 – have very low age dependency ratios which reflects a near absence of children under age 18 living in these areas.



**Figure 14. Age Distribution and Population Characteristics by Census Tract (2017)**

	1016	1017	1018	North Tracts	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	South Tracts	1040	All Tracts
<b>Median Age</b>	32.9	36.2	33.3	34.4	43.1	19.4	21.8	35.4	60.5	32.1	33.0	46.7	52.8	29.5	34.0	18.9	33.8
<b>Selected Age Group:</b>																	
<b>Under 5 Years</b>	4	126	152	282	20	101	5	17	0	0	0	0	0	15	158	19	459
<b>5 to 17 years</b>	31	196	189	416	24	234	8	76	4	63	0	0	0	41	450	111	977
<b>18 to 24 years</b>	40	18	114	172	75	77	49	25	4	1,006	16	55	5	126	1,438	27	1,637
<b>25 to 44 years</b>	167	418	728	1,313	267	164	20	122	8	2,658	127	255	67	674	4,362	63	5,738
<b>45 to 64 years</b>	102	338	324	764	246	89	17	71	116	1,015	47	318	168	201	2,288	32	3,084
<b>65 years and over</b>	11	145	95	251	81	37	0	62	70	123	3	35	20	5	436	21	708
<b>All Ages</b>	355	1,241	1,602	3,198	713	702	99	373	202	4,865	193	663	260	1,062	9,132	273	12,603
<b>Selected Age Group:</b>																	
<b>Under 5 Years</b>	1.1%	10.2%	9.5%	8.8%	2.8%	14.4%	5.1%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	1.7%	7.0%	3.6%
<b>5 to 17 years</b>	8.7%	15.8%	11.8%	13.0%	3.4%	33.3%	8.1%	20.4%	2.0%	1.3%	0.0%	0.0%	0.0%	3.9%	4.9%	40.7%	7.8%
<b>18 to 24 years</b>	11.3%	1.5%	7.1%	5.4%	10.5%	11.0%	49.5%	6.7%	2.0%	20.7%	8.3%	8.3%	1.9%	11.9%	15.7%	9.9%	13.0%
<b>25 to 44 years</b>	47.0%	33.7%	45.4%	41.1%	37.4%	23.4%	20.2%	32.7%	4.0%	54.6%	65.8%	38.5%	25.8%	63.5%	47.8%	23.1%	45.5%
<b>45 to 64 years</b>	28.7%	27.2%	20.2%	23.9%	34.5%	12.7%	17.2%	19.0%	57.4%	20.9%	24.4%	48.0%	64.6%	18.9%	25.1%	11.7%	24.5%
<b>65 years and over</b>	3.1%	11.7%	5.9%	7.8%	11.4%	5.3%	0.0%	16.6%	34.7%	2.5%	1.6%	5.3%	7.7%	0.5%	4.8%	7.7%	5.6%
<b>All Ages</b>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Population Characteristic:</b>																	
<b>Sex ratio (males per 100 females)</b>	120.5	126.0	108.6	116.7	177.4	59.9	130.2	65.8	155.7	326.0	153.9	103.4	504.7	118.5	238.6	95.0	209.1
<b>Age dependency ratio</b>	14.9	60.3	37.4	43.8	21.3	112.7	15.1	71.1	57.8	4.0	1.6	5.6	8.3	6.1	18.2	123.8	27.6
<b>Old-age dependency ratio</b>	3.6	18.7	8.1	11.7	13.8	11.2	-	28.4	54.7	2.6	1.6	5.6	8.3	0.5	6.4	17.2	8.2
<b>Child dependency ratio</b>	11.3	41.6	29.2	32.0	7.5	101.5	15.1	42.7	3.1	1.3	-	-	-	5.6	11.7	106.6	19.3

Source: U.S. Census Bureau – American Community Survey (5-year estimates)

Notes: The age dependency ratio is defined by dividing the combined under 18 years and 65 years and over by the 18-64 years population and multiplying by 100. The old-age dependency Ratio is defined as the population 65 years and over divided by the 18 to 64 years population and multiplying by 100. The child dependency ratio is defined as the population under 18 years by the 18 to 64 years population and multiplying by 100.

## Housing Units

In most regions, population and housing growth are closely intertwined. Weak population growth downtown prior to MAPS coincided with a deteriorating housing market. Virtually no new housing development took place downtown from 1980 until 1998 when development began in Deep Deuce as the initial MAPS projects were coming online. The Deep Deuce at Bricktown apartments were completed in 2001 and their immediate success signaled the first major step in the revitalization of housing downtown.

### Housing Unit Growth – County Assessment Data

Housing developers have since made considerable progress in transforming downtown into a much more attractive housing market for potential residents. A significant number of redevelopment efforts and new construction projects have been completed.

Figure 15 details housing unit counts derived from county property assessment data by Census tract in the downtown study area. The data is tracked in two-year intervals from tax year 2009 to tax year 2017. Assessment data is available on an annual basis and, because of mandatory reporting requirements, provides a highly accurate count of housing units. However, assessment data has a time lag in the sense that property valuations are used in arrears by one year to calculate property taxes. The most recent year of assessment data covers tax year 2017 which reflects market valuations in calendar year 2016. This lags one year behind the most recently available data embedded in the Census 5-year ACS estimates of housing units for 2017 discussed in a subsequent section.

Much like population growth, assessment data suggest that downtown housing development accelerated sharply since 2009, reaching a reported total of 7,635 units in 2017. Approximately 2,700 units were added in the study area between tax years 2009 and 2017, a 55.3% gain in the period. More than 90 percent (2,453 units) of new units added since 2009 were built between tax years 2013 and 2017, the latter half of the full period examined.

Three-fourths of new downtown residential units added since 2009 are found in just two Census tracts – 1025 (St. Anthony Hospital, 1,052 units) and 1038 (Bricktown and Deep Deuce, 1,006 units). This is consistent with the largest adjusted population gains reported in these tracts in Figure 13. These two tracts are now home to the largest concentrations of total residential units among all study area tracts.

Two additional tracts – 1026 (Department of Commerce, 330 units) and 1030 (South OU Health Center, 311 units) – account for most of the balance of new residential units. Both tracts posted nearly all their growth recently, between 2015 and 2017. The only other substantial housing unit gain is found in tract 1036.01 in the central business district, with 62 new units added between 2009 and 2017.

All other tracts posted small net gains or losses in residential unit count. The three historically residential northern tracts showed little net change in unit count between 2009 and 2017, with two (1017 and 1018) of three northern tracts posting small declines. These small unit gains reflect the largely built-out nature of the area and limited in-fill of multiple units per plot.

The mostly-nonresidential tract (1037) near Union Station experienced the largest decline (42 units) in the period, a small loss in number but one that represents more than half the total units in the tract back in 2009. These housing unit losses largely reflect changing land-use patterns in the area. Tract 1040

south of I-40 reported a loss of 10 housing units between 2013 and 2017. This decline reflects both the removal of properties purchased to accommodate south Scissortail Park and changing land-use patterns.

**Figure 15. Downtown Housing Units by Census Tract – Assessment Data**

Census Tract	Tax Year					Change			Percentage Change		
	2009	2011	2013	2015	2017	2009-13	2013-17	2009-17	2009-13	2013-17	2009-17
<b>1016</b>	363	364	362	376	375	-1	13	12	-0.3%	3.6%	3.3%
<b>1017</b>	537	538	532	546	529	-5	-3	-8	-0.9%	-0.6%	-1.5%
<b>1018</b>	805	804	799	794	791	-6	-8	-14	-0.7%	-1.0%	-1.7%
<b>North Tracts</b>	1,705	1,706	1,693	1,716	1,695	-12	2	-10	-0.7%	0.1%	-0.6%
<b>1025</b>	346	346	393	694	1,398	47	1,005	1,052	13.6%	255.7%	304.0%
<b>1026</b>	144	144	144	144	474	0	330	330	0.0%	229.2%	229.2%
<b>1027</b>	5	5	5	5	5	0	0	0	0.0%	0.0%	0.0%
<b>1030</b>	543	541	532	526	854	-11	322	311	-2.0%	60.5%	57.3%
<b>1091</b>	213	219	186	217	217	-27	31	4	-12.7%	16.7%	1.9%
<b>1032</b>	1,121	1,117	1,107	1,109	1,137	-14	30	16	-1.2%	2.7%	1.4%
<b>1036.01</b>	218	224	231	246	280	13	49	62	6.0%	21.2%	28.4%
<b>1036.02</b>	31	31	32	31	31	1	-1	0	3.2%	-3.1%	0.0%
<b>1037</b>	75	72	67	62	33	-8	-34	-42	-10.7%	-50.7%	-56.0%
<b>1038</b>	416	491	693	857	1,422	277	729	1,006	66.6%	105.2%	241.8%
<b>South Tracts</b>	3,112	3,190	3,390	3,891	5,851	278	2,461	2,739	8.9%	72.6%	88.0%
<b>1040</b>	99	99	99	95	89	0	-10	-10	0.0%	-10.1%	-10.1%
<b>Total</b>	<b>4,916</b>	<b>4,995</b>	<b>5,182</b>	<b>5,702</b>	<b>7,635</b>	<b>266</b>	<b>2,453</b>	<b>2,719</b>	<b>5.4%</b>	<b>47.3%</b>	<b>55.3%</b>

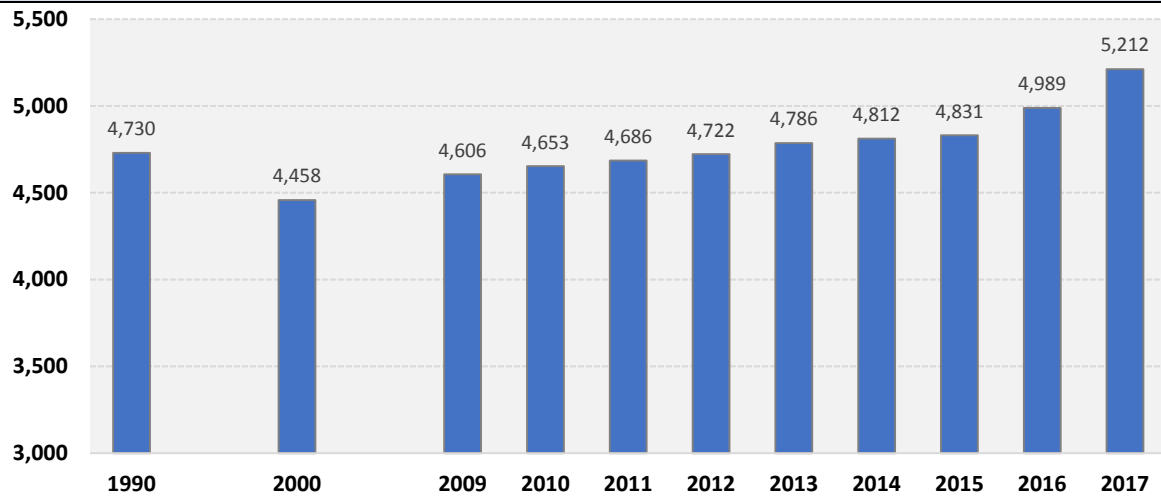
Source: Oklahoma County Assessor and City of Oklahoma City Planning Department

### Housing Unit Growth – Census ACS Data

Census ACS data provide an alternative count of housing units in the study area at the tract level. ACS survey data are highly informative at the tract level because they provide a unit count as well as a detailed description of the characteristics of housing in the study area. The tradeoff when using ACS data is the use by Census of 5-year estimates within small regions. Again, the use of a 5-year survey period will result in an understatement of changes in the most recent years of data but will typically provide a conservative estimate of the change.

Figure 16 provides an overview of total housing units in the 14 tracts in the downtown study area since 1990. Much like the assessment data, the turnaround in the downtown housing market is evident in the Census estimates as well. After a decline of nearly 300 housing units between 1990 and 2000, approximately 200 units were added between 2000 and 2010. The pace then accelerated to more than 550 units between 2010 and 2017. Converted to a decade equivalent pace, approximately 800 units would be added between 2010 and 2020, a far faster pace than experienced in the prior two decades.

Measured from the long-term bottom of 4,458 units in 2000, Census reports about 750 net new housing units added through 2017, pushing the total to 5,212. The reported growth confirms the uptrend in housing units in county assessment data trails the sharp gains reported in the assessment data in the most recent years due to the ACS 5-year survey period. The much stronger growth reported in the ACS data between 2015 and 2017 is more reflective of the rapid growth in the period.

**Figure 16. Downtown Housing Units by Census Tract – ACS Data**

Source: U.S. Census Bureau – American Community Survey (5-year estimates)

Notes: Estimates for 1990 and 2000 are from the Decennial Census. Estimates for 2009 through 2017 are from the American Community Survey (5-year estimates).

**Figure 17. Persons per Household in Occupied Housing Units (2017)**

Region	Total	Owner occupied	Renter Occupied
<b>United States</b>	2.63	2.70	2.52
<b>State of Oklahoma</b>	2.58	2.62	2.49
<b>Oklahoma City MSA</b>	2.61	2.69	2.47
<b>Oklahoma County</b>	2.55	2.62	2.46
<b>North Tracts</b>			
<b>1016</b>	1.54	2.21	1.36
<b>1017</b>	2.56	2.90	1.25
<b>1018</b>	2.22	2.71	1.79
<b>South Tracts</b>			
<b>1025</b>	1.29	3.25	1.24
<b>1026</b>	2.44	-	2.44
<b>1027</b>	1.51	-	1.58
<b>1030</b>	2.41	2.73	1.26
<b>1091</b>	1.25	1.80	1.17
<b>1032</b>	1.52	1.81	1.48
<b>1036.01</b>	1.25	-	1.25
<b>1036.02</b>	2.15	2.33	2.00
<b>1037</b>	1.54	1.54	-
<b>1038</b>	1.49	2.10	1.38
<b>1040</b>	3.37	2.92	4.67

Source: U.S. Census Bureau – American Community Survey (5-year estimates)

Notes: Summary measures for the north and south tracts is unknown because the number of persons living in occupied housing units by type is not reported.

**Household Size.** The average household size for occupied housing units in the study area is relatively small compared to broader regions (see Figure 17). Nearly every tract in the study area has fewer than 2.50 persons per household which trails the county (2.55), state (2.58), metropolitan area (2.61), and nation (2.63).

Eight of the 14 tracts in the study area have fewer than 2 persons per household on average. The average size is mostly a reflection of small households with few children living in rental properties. Ten of the 13 tracts with a household size reported for rental properties have fewer than 2 residents per household. This falls far below the countywide average of 2.46 persons per household for rentals.

For owner-occupied housing, the largest average size is found in the north in tract 1017 (Heritage Hills, 2.90) and in the south in tracts 1025 (St. Anthony Hospital, 3.25) and 1030 (south OU Health Center, 2.73). The largest overall household size (3.37) is found in tract 1040 south of I-40, which reflects both an above-average household size for owner-occupied properties (2.92) and extremely high household size (4.67) for rental properties. The large household size in tract 1040 is consistent with the high share of residents under the age of 18 residing in the tract.

**Changing Ownership Status.** The downtown housing market is primarily rental and is becoming increasingly so (see Figure 18). Almost 60% of the housing units in the study area are renter-occupied in 2017 versus only 51% in 1990. Less than one-fourth (23%) are owner-occupied, with 18% of units vacant. Most of the vacant properties would be classified as rentals if occupied.

The share of owner-occupied properties has remained relatively flat at about 23-24% of units since 2000. The share gained by rentals over time is traced to a reduction in vacancy rates which are down more than 10 percentage points since 1990.

The elevated vacancy rate in 1990 underscores the urgency in addressing conditions in the downtown area through the initial MAPS projects. Vacancies as a share of total units trended down sharply between 1990 and 2000 but remained approximately 18-19% of total units between 2000 and 2017. Vacancy rates also dropped from 2010 to 2017 despite significant new owner- and renter-occupied units entering the market. Much of the remaining vacancy rate is believed attributable to property which will be redeveloped or replaced in the coming years.

Figure 18. Housing Characteristics of Downtown Study Area Census Tracts								
Year	Total	Owner Occupied	Renter Occupied	Vacant	Total	Owner Occupied	Renter Occupied	Vacant
1990	4,730	969	2,428	1,333	100.0%	20.5%	51.3%	28.2%
2000	4,458	1,072	2,543	843	100.0%	24.0%	57.0%	18.9%
2010	4,653	1,112	2,575	966	100.0%	23.9%	55.3%	20.8%
2017	5,212	1,207	3,074	931	100.0%	23.2%	59.0%	17.9%

Source: U.S. Census Bureau

Notes: Estimates for 1990 and 2000 are from the Decennial Census. Estimates for 2010 and 2017 are from the American Community Survey (five-year estimates).



**Housing Characteristics by Census Tract.** Figure 19 provides a detailed overview of the current characteristics of housing units for each Census tract in the downtown study area in 2017.

By ownership status, the share of owner-occupied units exceeds 50% in only three tracts - 1017 (Heritage Hills, 69.2%) to the north along with 1030 (south OU Health Center, 54.5%) and 1040 (south of I-40 to Oklahoma River, 57.7%) to the south.

The rental share exceeds 50% in all other tracts that are not considered high-vacancy areas. Vacancy rates are highest and exceed 30% in tracts 1016 (far north, 33.4%), 1030 (South OU Health Center, 30.2%), 1036.02 (Police Department and Courts, 40.9%), and 1037 (Union Station, 78.0%).

Despite the rebound in the study area housing market, median monthly rents are still relatively low from a regional and national perspective, reaching \$947 in 2017. Median rents exceeded \$1,000 in six tracts – 1017 (Heritage Hills, \$1,074), 1027 (North OU Health Center, \$1,052), 1030 (South OU Health Center, \$2,000), 1032 (National Memorial and County Jail, \$1,129), 1036.01 (Myriad Gardens and Civic Center, \$1,161), and 1038 (Bricktown and Deep Deuce, \$1,260). Tracts with more new housing development in recent years tend to have the highest monthly median rents.

Tracts with monthly rents that remain far below the study area average include 1025 (St. Anthony Hospital, \$691) and 1026 (Department of Commerce, \$575). Reliable median rent estimates are not reported by Census for three tracts – 1091 (Automobile Alley to Cox Center), 1036.02 (Police Department and Courts), and 1037 (Union Station). Little owner-occupied housing is available in these three tracts and vacancy rates are highly elevated, suggesting lower-quality rental properties and those targeted for future redevelopment.

For owner-occupied homes, median values 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 owner-occupied home values remain the lowest in tracts 1030 (South OU Health Center, \$104,800), 1032 (National Memorial and County Jail, \$119,500), and 1016 (far north, \$143,100).

**Figure 19. Housing Unit Characteristics by Census Tract (2017)**

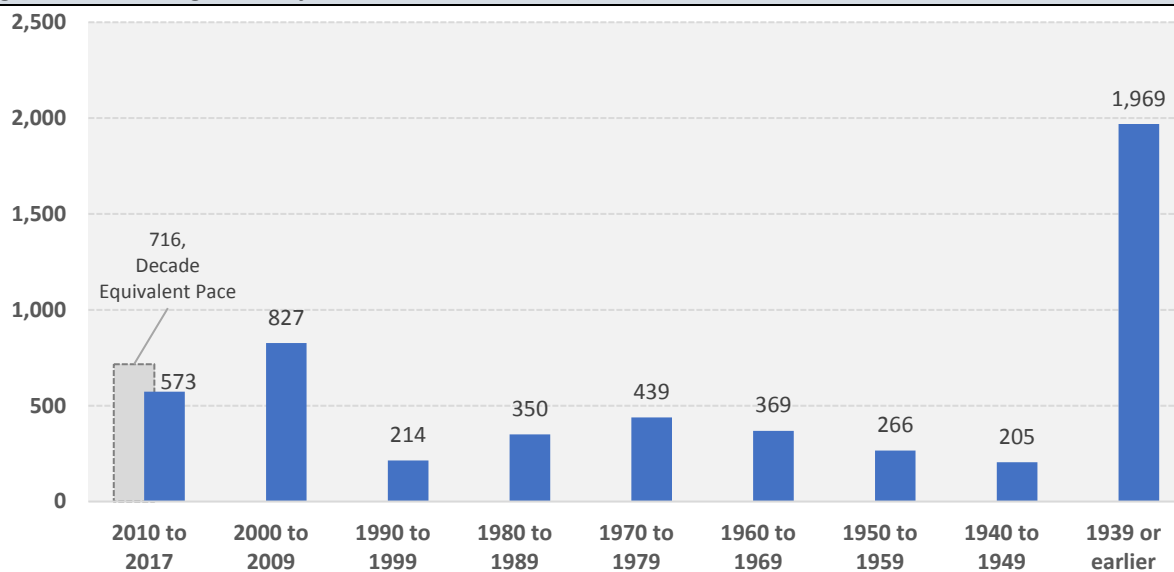
Census Tract																	
Housing Characteristics	1016	1017	1018	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	1040	North Tracts	South Tracts	All Tracts
	Housing Units																
Occupied housing units	231	484	716	510	232	35	155	162	784	154	13	13	711	81	1,431	2,769	4,281
Owner-occupied	47	385	336	12	0	4	121	20	95	0	6	13	108	60	768	379	1,207
Renter-occupied	184	99	380	498	232	31	34	142	689	154	7	0	603	21	663	2,390	3,074
Vacant housing units	116	72	90	115	38	8	67	0	183	51	9	46	113	23	278	630	931
Total housing units	347	556	806	625	270	43	222	162	967	205	22	59	824	104	1,709	3,399	5,212
	Share of Total Housing Units																
Occupied housing units	66.6%	87.1%	88.8%	81.6%	85.9%	81.4%	69.8%	100.0%	81.1%	75.1%	59.1%	22.0%	86.3%	77.9%	83.7%	81.5%	82.1%
Owner-occupied	13.5%	69.2%	41.7%	1.9%	0.0%	9.3%	54.5%	12.3%	9.8%	0.0%	27.3%	22.0%	13.1%	57.7%	44.9%	11.2%	23.2%
Renter-occupied	53.0%	17.8%	47.1%	79.7%	85.9%	72.1%	15.3%	87.7%	71.3%	75.1%	31.8%	0.0%	73.2%	20.2%	38.8%	70.3%	59.0%
Vacant housing units	33.4%	12.9%	11.2%	18.4%	14.1%	18.6%	30.2%	0.0%	18.9%	24.9%	40.9%	78.0%	13.7%	22.1%	16.3%	18.5%	17.9%
Total housing units	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Year of Construction																
Built 2010 to 2016	0	0	5	174	51	0	17	0	4	0	0	0	322	0	5	568	573
Built 2000 to 2009	5	19	8	37	0	20	52	12	265	14	7	0	354	34	32	761	827
Built 1990 to 1999	6	0	31	15	0	4	0	0	60	16	0	0	82	0	37	177	214
Built pre 1999	336	537	762	399	219	19	153	150	638	175	15	59	66	70	1,709	3,399	3,598
Total housing units	347	556	806	625	270	43	222	162	967	205	22	59	824	104	1,709	3,399	5,212
	Owner Occupied Home Value																
Less than \$50,000	9	7	9	0	0	0	15	4	0	0	0	6	0	29	25	25	79
\$50,000 to \$99,999	0	0	25	0	0	4	43	0	28	0	0	0	5	15	25	80	120
\$100,000 to \$149,999	17	12	42	0	0	0	41	12	25	0	6	0	0	16	71	84	171
\$150,000 to \$199,999	7	31	17	12	0	0	0	0	18	0	0	7	4	0	55	41	96
\$200,000 to \$299,999	14	87	77	0	0	0	9	0	24	0	0	0	19	0	178	52	230
\$300,000 to \$499,999	0	104	145	0	0	0	5	0	0	0	0	0	42	0	249	47	296
\$500,000 to \$999,999	0	109	21	0	0	0	4	0	0	0	0	0	38	0	130	42	172
\$1,000,000 or more	0	35	0	0	0	0	4	4	0	0	0	0	0	0	35	8	43
Total	47	385	336	12	0	4	121	20	95	0	6	13	108	60	768	379	1,207
Median Home Value	143,100	427,600	296,200	-	-	-	104,800	-	119,500	-	-	-	423,800	-	-	-	-
Median Gross Rent (dollars)	887	1,074	783	691	575	1,052	2,000	-	1,129	1,161	-	-	1,260	881	855	973	947

Source: U.S. Census Bureau – American Community Survey (5-year estimates)

**Housing Stock by Year of Construction.** Recent construction is slowly tilting the construction era profile for housing units in the study area toward newer vintages. Figure 20 illustrates the reported age of housing in the study area by decade based on a 5-year survey period.<sup>30</sup> The 573 newly constructed housing units between 2010 and 2017 represent 11% of total housing units. The growth in the current decade through 2017 equates to a decade equivalent pace of 716 units, slightly below the 827-unit pace reported in the 2000 to 2009 period. A reported 1,400 housing units (27% of total units) have now been constructed in the study area since 2000.

The pace of new housing construction the past two decades far exceeds the rate at the trough in economic conditions in the 1990 to 1999 period when only 214 new units were built. It also exceeds the share of housing constructed in all prior decades tracked by Census.

**Figure 20. Housing Units by Year of Construction (2017)**



Source: U.S. Census Bureau – American Community Survey (5-year estimates)

**Historic Preservation.** A significant share of the city’s early legacy housing stock remains in place, with 1,969 units (38%) constructed in 1939 or earlier and 2,174 units (42%) constructed prior to 1950.

In the three northern residential tracts, nearly all housing units were built prior to 2000 and more than 75% were built prior to 1940 (see Figure 19).

Historic Preservation Districts are in place in tracts 1017 (Heritage Hills) and 1018 (Mesta Park).<sup>31</sup> A Historic Landmark Overlay District is also located within the downtown study area. Changes to buildings, demolitions, and new construction in these preservation zones require the approval of either the Historic Preservation Commission or Planning Department staff.<sup>32</sup>

## School Enrollment

Nearly 1,900 residents ages 3 and over in the study area were enrolled in educational programs ranging from nursery and preschool to college and graduate school in 2017 (see Figure 21). This represents only 15% of the 12,603 total residents in the area. Far higher shares of the population are enrolled in school across the city (28.4%), county (27.5%), metropolitan area (28.4%), and state (26.8%). The key factor underlying the low share of residents enrolled in school is the low share of residents of traditional school age.

**Low Share of School-Aged Children.** The low overall enrollment status of residents in the study area is mostly explained by a low share of children in the traditional school years from kindergarten through grade 12. Only 7.8% of residents in the study area are in their traditional school years versus 18-19% of residents at the county, state, and metro area levels. The introduction of John W. Rex Elementary School through MAPS for Kids begins to address the relative lack of public education opportunities for families who choose to live downtown.

The 1.2% share of residents enrolled in preschool also falls below city, county, and state shares of approximately 1.8%.

The 6.8% share of study area residents enrolled in college or graduate school is only slightly below the county average of 7.0% but just above the city average of 6.7%.

**Changing Enrollment Mix.** In 2017, approximately 44% of school enrollment was in middle school or lower (836 persons), 13% in high school, and the remaining 43% in college or graduate school (811 persons).

Shifts in school enrollment are also following the general acceleration in downtown population since 2010. Total school enrollment in 2017 is down by about 100 from a high of approximately 2,000 students in 2000 but has rebounded by almost 225 students since 2010.

Shifts have also taken place in the composition of downtown residents enrolled in education. Declines in enrollment between 2000 and 2010 occurred in the three middle education categories encompassing K-12 education (496 persons). Conversely, enrollment increased at the extremes of the enrollment range. Nursery and preschool enrollment increased by 61 persons while college enrollment climbed by 105.

**Figure 21. School Enrollment Persons 3 Years and Over - Study Area Census Tracts**

School Enrollment	2000	2010	2017	Change 2000-10	Change 2010-17	Percent Change 2000-10	Percent Change 2010-17
Nursery school, preschool	89	150	140	61	-10	68.5%	-6.7%
Kindergarten	126	76	76	-50	0	-39.7%	0.0%
Elementary and middle school (grades 1-8)	710	470	620	-240	150	-33.8%	31.9%
High school (grades 9-12)	420	214	240	-206	26	-49.0%	12.1%
College or graduate school	649	754	811	105	57	16.2%	7.6%
<b>Total Enrolled Ages 3+</b>	<b>1,994</b>	<b>1,664</b>	<b>1,887</b>	<b>-330</b>	<b>223</b>	<b>-16.5%</b>	<b>13.4%</b>

Source: Census Bureau American Community Survey (5-year estimates)

Since 2010, some weakness is present among the youngest educational programs including a small loss in nursery and preschoolers and flat counts for kindergartners. However, sizeable gains were posted between 2010 and 2017 in the number of elementary, secondary, and college students residing in the study area. A total of 176 new residents are reported as enrolled in elementary and secondary school. A total of 811 study area residents are now enrolled in college or graduate school, up from 650 in 2000.

**Educational Institutions.** Along with the construction of John W. Rex Elementary School, other educational institutions have established a presence in the downtown study area in recent years.

The University of Central Oklahoma (UCO) opened the Academy of Contemporary Music<sup>33</sup> in Bricktown in 2010. The Academy trains students for careers in the music industry through a unique curriculum, state-of-the-art performance spaces, and instruction and mentoring from professionally-accomplished faculty. In 2014, UCO also began offering a range of classes downtown in the lower level of the Carnegie Centre at 131 Dean A. McGee Avenue.

In 2012, the law school at Oklahoma City University announced its move to the former Central High School building in midtown. Total expenditures associated with the move are a reported \$20-22 million.<sup>34</sup> Approximately 550 law students and nearly 100 employees have moved to the new campus.

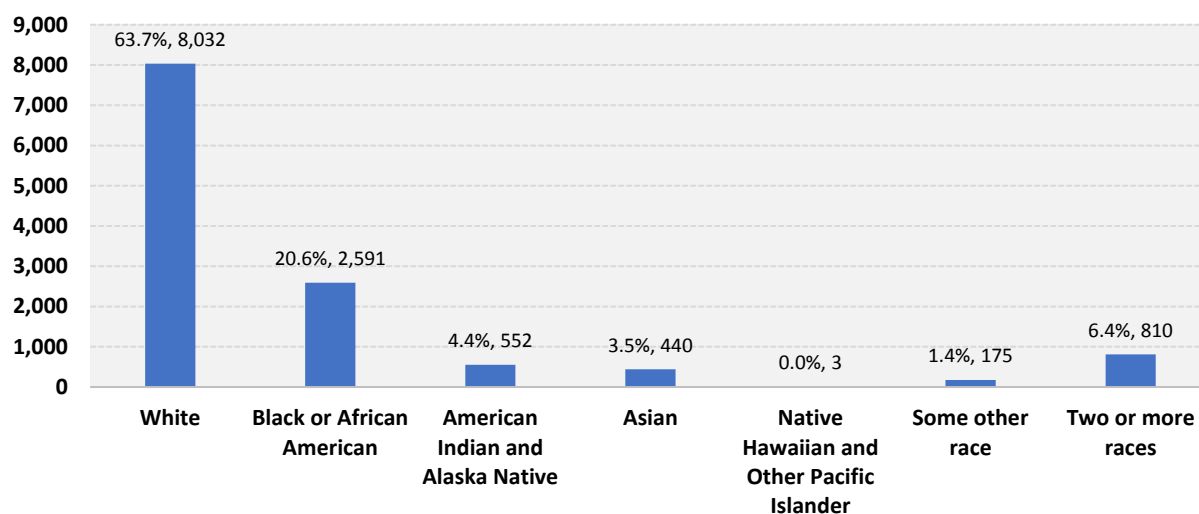
## Racial Diversity

Figure 22 summarizes estimates of population shares by race within the downtown study area in 2017. Figure 23 provides a detailed profile by race and Hispanic status for each Census tract.

About two-thirds (63.7%) of the study area population identified as white (non-Hispanic), far lower than the 68.9% share in Oklahoma County and 72.9% share statewide.

Approximately 20% of residents identified as black or African American (non-Hispanic), well above the 15.0% share at the county level and 7.3% share statewide. The greatest number of black or African American residents is found in tract 1032, reflecting a much higher proportion in group quarters.

**Figure 22. Downtown Study Area Residents by Race**



Source: Census Bureau American Community Survey (5-year estimates)

**Figure 23. Population by Race by Census Tract (2017)**

	Number of Persons																
	Census Tract																
Race	1016	1017	1018	North Tracts	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	South Tracts	1040	All Tracts
White	310	1,098	1,360	2,768	529	135	66	91	130	2,542	139	421	166	867	5,086	178	8,032
Black or African American	16	36	38	90	94	417	18	250	60	1,295	0	202	51	37	2,424	77	2,591
American Indian and Alaska Native	0	15	37	52	7	8	4	9	12	407	6	15	14	18	500	0	552
Asian	0	43	72	115	39	56	8	8	0	54	42	0	0	118	325	0	440
Native Hawaiian & Other Pacific Isl.	0	0	0	0	0	0	0	0	0	3	0	0	0	0	3	0	3
Some other race	0	10	32	42	4	4	2	0	0	93	0	0	5	14	122	11	175
Two or more races:	29	39	63	131	40	82	1	15	0	471	6	25	24	8	672	7	810
Total	355	1,241	1,602	3,198	713	702	99	373	202	4,865	193	663	260	1,062	9,132	273	12,603
Hispanic or Latino (of any race)	48	31	71	150	13	23	2	3	0	470	6	9	13	45	584	189	923
Not Hispanic or Latino	307	1,210	1,531	3,048	700	679	97	370	202	4,395	187	654	247	1,017	8,548	84	11,680
	Percent Share of Total Persons																
	Census Tract																
Race	1016	1017	1018	North Tracts	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	South Tracts	1040	All Tracts
White	87.3%	88.5%	84.9%	86.6%	74.2%	19.2%	66.7%	24.4%	64.4%	52.3%	72.0%	63.5%	63.8%	81.6%	55.7%	65.2%	63.7%
Black or African American	4.5%	2.9%	2.4%	2.8%	13.2%	59.4%	18.2%	67.0%	29.7%	26.6%	0.0%	30.5%	19.6%	3.5%	26.5%	28.2%	20.6%
American Indian and Alaska Native	0.0%	1.2%	2.3%	1.6%	1.0%	1.1%	4.0%	2.4%	5.9%	8.4%	3.1%	2.3%	5.4%	1.7%	5.5%	0.0%	4.4%
Asian	0.0%	3.5%	4.5%	3.6%	5.5%	8.0%	8.1%	2.1%	0.0%	1.1%	21.8%	0.0%	0.0%	11.1%	3.6%	0.0%	3.5%
Native Hawaiian & Other Pacific Isl.	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Some other race	0.0%	0.8%	2.0%	1.3%	0.6%	0.6%	2.0%	0.0%	0.0%	1.9%	0.0%	0.0%	1.9%	1.3%	1.3%	4.0%	1.4%
Two or more races:	8.2%	3.1%	3.9%	4.1%	5.6%	11.7%	1.0%	4.0%	0.0%	9.7%	3.1%	3.8%	9.2%	0.8%	7.4%	2.6%	6.4%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Hispanic or Latino (of any race)	13.5%	2.5%	4.4%	4.7%	1.8%	3.3%	2.0%	0.8%	0.0%	9.7%	3.1%	1.4%	5.0%	4.2%	6.4%	69.2%	7.3%
Not Hispanic or Latino	86.5%	97.5%	95.6%	95.3%	98.2%	96.7%	98.0%	99.2%	100.0%	90.3%	96.9%	98.6%	95.0%	95.8%	93.6%	30.8%	92.7%

Source: Census Bureau – American Community Survey (5-year estimates)

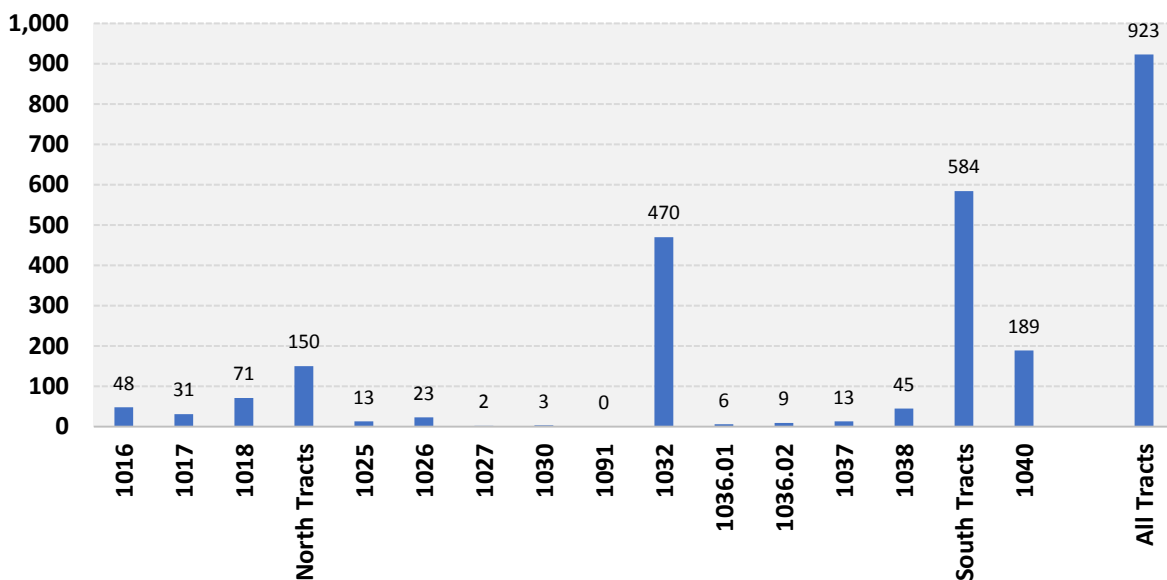


Among other residents listing an individual race (non-Hispanic), 4.4% identify as American Indian or Alaska Native reflecting the high share of American Indians residing in Oklahoma. Statewide, 7.4% identify as American Indian, nearly triple the 2.9% share in Oklahoma County.

The Asian (non-Hispanic) share of population reached only 3.5% in 2017 but comprised an above-average share in northern tracts 1017 and 1018 as well as in southern tracts 1025, 1026, 1027, and 1036.01. The highest numbers of Asian residents are in northern tracts 1017 and 1018 between 13th and 23rd bordered by Western and Robinson. The highest share of Asian residents (21.8%) is reported in tract 1036.01 in the southern portion of downtown including the Myriad Gardens.

Those reporting as Hispanic or Latino (but of any race) comprise only 7.3% of the study area population in 2017. This is far lower than the 16.4% share in Oklahoma County and slightly below the statewide share of 9.8%. Figure 24 summarizes the location of Hispanic residents across the tracts in the study area. The highest number is found in tract 1032 (470, National Memorial and County Jail) but represents only a 9.7% share of the highly populated tract. The highest share of Hispanic residents (69.2% share) and second-highest by number (189) are reported in tract 1040, south of I-40 to the Oklahoma River. The Hispanic share is also reported as above average in tract 1016 (13.5% share) in the northern portion of the study area and tract 1032 (9.7% share) in the southern portion of downtown.

**Figure 24. Downtown Study Area Residents Hispanic or Latino of any race (2017)**



Source: Census Bureau - American Community Survey (5-year estimates)

The share of residents reporting as two or more races is 6.4% and is most highly concentrated in four tracts – tract 1016 (8.2% share) to the far north, tract 1026 (11.7% share) near the Oklahoma Department of Commerce, tract 1032 (9.7% share) near the National Memorial and County Jail, and tract 1037 (9.2% share) including Union Station. The study area's 6.4% share of residents reporting as two or more races is slightly below the statewide share of 6.8% but slightly above the countywide share of 5.4% in 2017.

**Figure 25. Educational Attainment of Population Ages 25 Years and Over by Census Tract (2017)**

Educational Attainment	1016	1017	1018	North Tracts	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	South Tracts	1040	All Tracts
<b>Total</b>	280	901	1147	2,328	594	290	37	255	194	3796	177	608	255	880	7,086	116	9,530
<b>Less than 9th grade</b>	0	13	24	37	9	6	0	8	9	205	0	32	11	5	285	23	345
<b>9th to 12th grade, no diploma</b>	3	0	78	81	70	12	4	4	50	747	6	130	95	0	1,118	31	1,230
<b>High school graduate (includes</b>	50	35	127	212	106	99	7	74	57	1176	9	275	81	10	1,894	19	2,125
<b>Some college, no degree</b>	56	118	187	361	103	87	13	68	46	665	43	102	42	69	1,238	20	1,619
<b>Associate's degree</b>	40	22	40	102	13	15	0	9	8	272	5	51	26	36	435	19	556
<b>Bachelor's degree</b>	75	310	464	849	195	44	4	61	8	429	68	18	0	429	1,256	4	2,109
<b>Graduate or professional degree</b>	56	403	227	686	98	27	9	31	16	302	46	0	0	331	860	0	1,546
<b>Total</b>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Less than 9th grade</b>	0.0%	1.4%	2.1%	1.6%	1.5%	2.1%	0.0%	3.1%	4.6%	5.4%	0.0%	5.3%	4.3%	0.6%	4.0%	19.8%	3.6%
<b>9th to 12th grade, no diploma</b>	1.1%	0.0%	6.8%	3.5%	11.8%	4.1%	10.8%	1.6%	25.8%	19.7%	3.4%	21.4%	37.3%	0.0%	15.8%	26.7%	12.9%
<b>High school graduate (includes</b>	17.9%	3.9%	11.1%	9.1%	17.8%	34.1%	18.9%	29.0%	29.4%	31.0%	5.1%	45.2%	31.8%	1.1%	26.7%	16.4%	22.3%
<b>Some college, no degree</b>	20.0%	13.1%	16.3%	15.5%	17.3%	30.0%	35.1%	26.7%	23.7%	17.5%	24.3%	16.8%	16.5%	7.8%	17.5%	17.2%	17.0%
<b>Associate's degree</b>	14.3%	2.4%	3.5%	4.4%	2.2%	5.2%	0.0%	3.5%	4.1%	7.2%	2.8%	8.4%	10.2%	4.1%	6.1%	16.4%	5.8%
<b>Bachelor's degree</b>	26.8%	34.4%	40.5%	36.5%	32.8%	15.2%	10.8%	23.9%	4.1%	11.3%	38.4%	3.0%	0.0%	48.8%	17.7%	3.4%	22.1%
<b>Graduate or professional degree</b>	20.0%	44.7%	19.8%	29.5%	16.5%	9.3%	24.3%	12.2%	8.2%	8.0%	26.0%	0.0%	0.0%	37.6%	12.1%	0.0%	16.2%
<b>Less than High School</b>	1.1%	1.4%	8.9%	5.1%	13.3%	6.2%	10.8%	4.7%	30.4%	25.1%	3.4%	26.6%	41.6%	0.6%	19.8%	46.6%	16.5%
<b>Bachelor's Degree or Higher</b>	46.8%	79.1%	60.2%	65.9%	49.3%	24.5%	35.1%	36.1%	12.4%	19.3%	64.4%	3.0%	0.0%	86.4%	29.9%	3.4%	38.4%
<b>Average Years of Schooling</b>	14.7	16.2	14.9	15.4	14.3	13.4	14.1	13.9	12.4	12.7	15.3	11.9	11.6	16.3	13.3	11.4	13.8

Source: Census Bureau – American Community Survey (5-year estimates); RegionTrack calculations of average years of schooling using methodology of Barro and Lee (2010) “A New Data Set of Educational Attainment in the World, 1950-2010.” NBER working paper 15902. Cambridge: National Bureau of Economic Research (NBER). <http://www.nber.org/papers/w15902.pdf>.

## Educational Attainment

The average level of education in the downtown study area is relatively high. Residents ages 25 and over have an average of 13.8 years of schooling in 2017, or 1.8 years of education beyond high school on average.<sup>35</sup> This exceeds the average level of schooling for the county (13.5 years), metropolitan area (13.5 years), state (13.3 years), and nation (13.5 years).

A bachelor's degree or higher is held by 38.4% of residents in the study area, well above the county (31.2%), metro area (29.6%), state (24.8%) and nation (30.9%) using a comparable five-year Census ACS measure.

**Education Across Tracts.** There is considerable variation in educational attainment across the Census tracts in the study area. Figure 25 details the distribution of educational attainment for each tract.

The relatively high overall education level in the study area is traced largely to the northern highly residential tracts. Education levels are far higher in the three northernmost tracts (1016, 1017, and 1018), with 68% of residents having completed a bachelor's degree or higher. The average length of schooling in these three tracts is 15.3 years (3.3 years beyond high school), with 86% of residents having completed some education beyond high school. In tract 1017 in the north, approximately 95% of residents have some education beyond high school, 79% report a bachelor's degree or higher, and 45% hold a graduate or professional degree.

Among the southern tracts, the highest levels of attainment are found in tracts 1036.01 (15.3 years, Downtown and Myriad Gardens) and 1038 (16.3 years, Bricktown and Deep Deuce), with residents in both having roughly a college degree on average. More than half of residents in these two tracts have a bachelor's degree or higher, well above the state and national average. More than 86% of residents in tract 1038 (Bricktown and Deep Deuce) have completed a bachelor's degree or higher, the highest share among all tracts in the study area.

The lowest educational attainment levels in 2017 are found in tract 1037 (11.6 years, Union Station) and tract 1040 (11.4 years, 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. Two other tracts – 1036.02 (11.9 years, Police Department and Courts) and 1091 (12.4 years, Automobile Alley to Cox Center) – report a low average attainment level approximately equaling high school completion, as well as a low share of residents with a bachelor's degree or higher.

## Household Income

Consistent with high overall levels of education, household incomes across the downtown study area are relatively high compared to the county, state, and nation in 2017. Median household income in the study area reached \$59,605 in 2017, 17% above the county median of \$50,762 and 20% above the statewide median of \$49,767. The median income in the study area is also 3.4% above the U.S. median of \$57,652 in 2017.

Income distributions for households in each Census tract in the study area are detailed in Figure 26. Income measured using the average (\$90,907) is far above the median for the study area (\$59,605). This large gap indicates a significant concentration of very high earning households in the study area.

Across all downtown tracts, 29% of households report income of \$100,000 or more, while four tracts – 1027, 1036.02, 1037, 1040 – report no households with income above \$100,000.

Areas with an above-average share of households with income above \$100,000 are found in two of the three northern tracts (1017-Heritage Hills, 62.6% and 1018-Mesta Park, 32.7%) and two of the southern tracts (1030-south OU Health Center, 30.4% and 1038-Bricktown and Deep Deuce, 39.1%). Like the median, the average income in these four tracts is above the study area average as well, reaching \$198,958 in tract 1017 (Heritage Hills), \$93,694 in tract 1018 (Mesta Park), \$84,087 in tract 1030 (South OU Health Center), and \$123,200 in tract 1038 (Bricktown and Deep Deuce).

Tract 1036.01 (downtown including Myriad Gardens) also has a high average household income of \$101,889 with high-earners concentrated in a relatively small share of households along with few low-earnings households.

Four southern tracts - 1026, 1027, 1091, 1036.02 - have very low incomes across most households, with more than half of households earning \$25,000 or less.

There is significant income diversity in many of the tracts in the study area. Tracts 1018, 1030, and 1032 all have median income above the study area average but have a relatively high share of households with income both above \$100,000 and below \$25,000.

**Figure 26. Household Income by Income Bracket and Census Tract (2017)**

	1016	1017	1018	North Tracts	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	South Tracts	1040	All Tracts
<b>Total Households</b>	231	484	716	1,431	510	232	35	155	162	784	154	13	13	711	2,769	81	4,281
<b>Less than \$10,000</b>	3.0%	1.4%	6.7%	4.3%	32.7%	33.2%	22.9%	7.7%	63.6%	7.1%	11.7%	0.0%	0.0%	7.9%	17.9%	27.2%	13.6%
<b>\$10,000 to \$14,999</b>	6.5%	0.0%	3.2%	2.7%	17.3%	8.2%	11.4%	10.3%	4.9%	5.5%	0.0%	53.8%	46.2%	3.4%	7.8%	4.9%	6.0%
<b>\$15,000 to \$24,999</b>	4.3%	0.0%	5.7%	3.5%	3.9%	27.6%	34.3%	5.2%	3.1%	10.3%	0.0%	0.0%	53.8%	3.2%	7.9%	3.7%	6.4%
<b>\$25,000 to \$34,999</b>	12.6%	2.5%	9.9%	7.8%	6.7%	9.5%	11.4%	18.1%	3.1%	12.6%	9.7%	46.2%	0.0%	2.4%	8.3%	29.6%	8.6%
<b>\$35,000 to \$49,999</b>	13.0%	6.6%	13.4%	11.0%	17.6%	13.4%	20.0%	14.2%	8.0%	13.5%	17.5%	0.0%	0.0%	10.0%	13.2%	21.0%	12.7%
<b>\$50,000 to \$74,999</b>	31.6%	12.6%	11.3%	15.0%	7.1%	2.2%	0.0%	2.6%	4.9%	14.8%	22.7%	0.0%	0.0%	22.1%	13.1%	13.6%	13.7%
<b>\$75,000 to \$99,999</b>	7.4%	14.3%	16.9%	14.5%	3.3%	3.9%	0.0%	11.6%	7.4%	8.4%	14.9%	0.0%	0.0%	12.0%	8.3%	0.0%	10.2%
<b>\$100,000 to \$149,999</b>	6.1%	15.3%	15.6%	14.0%	7.8%	0.0%	0.0%	14.2%	2.5%	17.5%	10.4%	0.0%	0.0%	15.6%	11.9%	0.0%	12.4%
<b>\$150,000 to \$199,999</b>	13.0%	6.4%	6.8%	7.7%	2.0%	0.0%	0.0%	11.0%	0.0%	6.6%	5.2%	0.0%	0.0%	7.3%	5.0%	0.0%	5.8%
<b>\$200,000 or more</b>	2.6%	40.9%	10.3%	19.4%	1.6%	2.2%	0.0%	5.2%	2.5%	3.6%	7.8%	0.0%	0.0%	16.2%	6.5%	0.0%	10.7%
<b>All Income Brackets</b>	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b>\$25,000 or less</b>	13.8%	1.4%	15.6%	10.5%	53.9%	69.0%	68.6%	23.2%	71.6%	22.9%	11.7%	53.8%	100.0%	14.5%	33.6%	35.8%	26.0%
<b>\$100,000 or more</b>	21.7%	62.6%	32.7%	41.0%	11.4%	2.2%	0.0%	30.4%	5.0%	27.7%	23.4%	0.0%	0.0%	39.1%	23.5%	0.0%	28.9%
<b>Median income (dollars)</b>	55,461	127,083	74,167	89,045	16,250	17,708	22,969	42,639	9,179	50,729	68,393	-	-	75,670	45,288	28,942	59,605
<b>Mean income (dollars)</b>	70,759	198,958	93,694	125,595	39,634	25,203	21,366	84,087	57,193	69,773	101,889	-	-	123,200	74,791	29,060	90,907

Source: U.S. Census Bureau – American Community Survey (5-year estimates)

Notes: Median and mean values for north, south, and all tracts are weighted averages of the median and mean values for each tract in the aggregate measure.

N = Not available or does not meet reporting requirement



## Disabilities of Residents

The share of disabilities among residents is an indicator of the level of health and social services that may be required by the populace (see Figure 27). The presence of disabilities, especially those with mental health concerns, is often closely related to homelessness and difficulty in finding adequate housing.

In the downtown study area, 14.7% of residents in the civilian noninstitutionalized population report having one or more disabilities in 2017. The disability share in the study area is slightly above both the national (12.6%) and county (13.6%) shares but falls below the state share (15.9%).

The disability share is far lower in the northern tracts with an average of only 5.6% reporting a disability, less than half the overall rate. The share is far higher at 21% in the southern tracts and is concentrated in four tracts with shares ranging from 25% to 71%. These four southern high-disability tracts include 1025 (St. Anthony Hospital, 25.2%), 1091 (Automobile Alley to Cox Center, 57.4%), 1036.02 (Police Department and Courts, 51.0%), and 1037 (Union Station, 70.7%).

More than 80% of residents in the study area with a disability are between the ages of 18 and 64. The largest concentrations in this age group are found in three tracts – tract 1036.02 (Police Department and Courts, 311 residents), tract 1025 (St. Anthony Hospital, 155 residents), and tract 1032 (National Memorial and County Jail, 109 residents). Tract 1018 in the north has a relatively low share of residents with a disability but reports one of the highest numbers (79 residents) of persons with a reported disability. Tract 1037 is one of the smallest tracts by total population but has the highest share and a relatively high number (Union Station, 81) of residents reporting a disability.

**Figure 27. Disabilities Among Population by Census Tract (2017)**

Census Tract	Total Civilian Non-Institutionalized Population	Total Persons With Disabilities	Share of Population With a Disability	Under 18 years	18 to 64 years	65 years and over
1016	349	26	7.4%	5	21	0
1017	1,241	52	4.2%	0	33	19
1018	1,579	100	6.3%	0	79	21
<b>North Tracts</b>	<b>3,169</b>	<b>178</b>	<b>5.6%</b>	<b>5</b>	<b>133</b>	<b>40</b>
1025	675	170	25.2%	6	155	9
1026	702	66	9.4%	9	35	22
1027	91	4	4.4%	0	4	0
1030	373	41	11.0%	0	17	24
1091	202	116	57.4%	4	83	29
1032	1,151	144	12.5%	0	109	35
1036.01	190	19	10.0%	0	19	0
1036.02	663	338	51.0%	0	311	27
1037	133	94	70.7%	0	81	13
1038	963	60	6.2%	0	60	0
<b>South Tracts</b>	<b>5,143</b>	<b>1,052</b>	<b>20.5%</b>	<b>19</b>	<b>874</b>	<b>159</b>
1040	273	35	12.8%	0	24	11
<b>All Tracts</b>	<b>8,585</b>	<b>1,265</b>	<b>14.7%</b>	<b>24</b>	<b>1,031</b>	<b>210</b>

Source: U.S. Census Bureau – American Community Survey (5-year estimates)

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. Those under 18 with a disability are found in only four tracts and in small numbers in each. Adults ages 65 and over with disabilities are spread more uniformly and found in most tracts in the study area.

## Homelessness

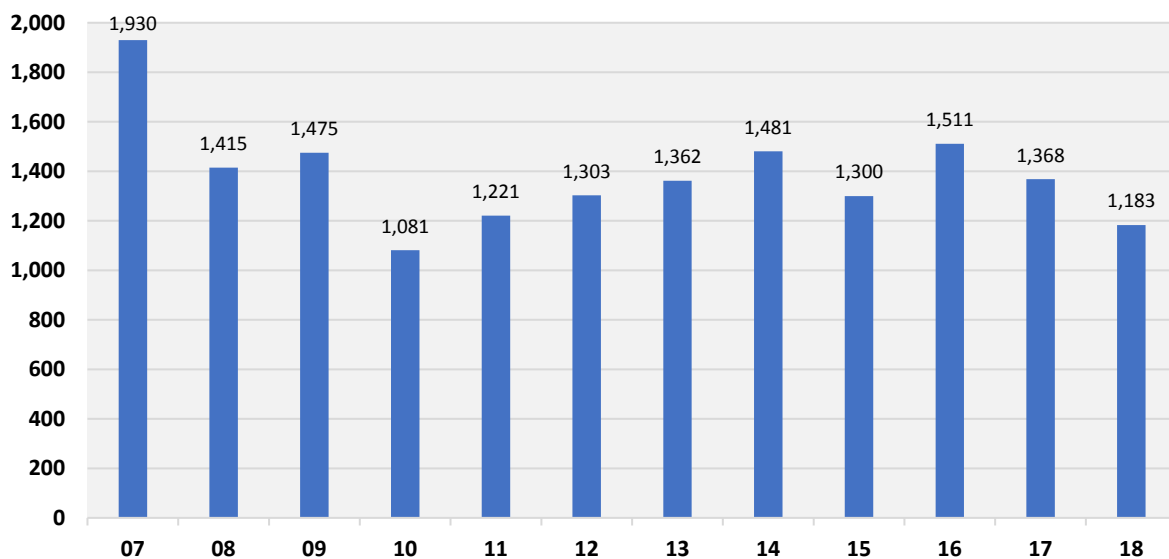
Much of the city's population of people experiencing homelessness is concentrated in the downtown study area. As a result, several non-profit organizations and public agencies addressing the needs of the homeless are also located in the area.

One of the potential concerns over city revitalization due to MAPS is the elimination of affordable housing which worsens homelessness downtown. Sharply rising rents produce a falling standard of living for families, particularly those headed by low-skill and low-wage workers.

In maintaining a count of the homeless, Oklahoma City uses federal funding from a U.S. Department of Housing and Urban Development (HUD) grant to participate in an annual Point in Time (PIT) count. The count is completed on one day in January of each year, surveying a range of locations including emergency shelters, transitional housing, meal sites, day shelters, and a street count. This one-day count provides only a snapshot of city homelessness and does not provide a complete analysis of the issues.

Figure 28 provides PIT counts of homelessness in Oklahoma City the past decade. In 2018, the one-day count identified 1,183 homeless men, women, and children.<sup>36</sup> Estimates suggest that the annual count in a community is four to five times its one-night PIT count. For Oklahoma City, this suggests 4,732 to 5,915 people who experienced homelessness in Oklahoma City in the most recent year.

**Figure 28. Point-in-Time Estimates of OKC Residents Experiencing Homelessness**



Source: Oklahoma City Planning Department – Housing and Community Development Division

Homeless counts in 2018 are down slightly relative to both 2016 and 2017 and just below the average count of 1,329 the past decade. A general trend of increased PIT numbers was reported between 2010 and 2014 before trending to lower levels since 2016. While the estimates provide a citywide count, the population of those without permanent housing remains heavily concentrated in the downtown area.

In addressing the long-run concerns over homelessness, the city maintains a consolidated plan to address the needs of the homeless.<sup>37</sup> Significant efforts remain underway to provide permanent supportive housing, particularly for those with disabilities who are experiencing homelessness. The results of a city-sponsored Cost-of-Homelessness Study in 2010 reinforced the cost-effectiveness of efforts to provide permanent supportive housing.<sup>38</sup>

For more than a decade, the Homeless Alliance along with more than 40 nonprofit, faith-based and government agencies have collaborated on an initiative called Journey Home OKC with the goal of housing veterans and others who are chronically homeless.<sup>39</sup> Since 2013, these agencies have housed more than 1,500 veterans and chronically homeless people, and over 250 additional permanent supportive housing beds have been added in Oklahoma City. Most recently in 2018, the group of agencies provided supportive housing for 282 veterans and approximately 180 persons who are chronically homeless.<sup>40</sup>

## Downtown Workforce

The employment base in the downtown study area can be characterized from two markedly different points of view – that of the residents who live there (place of residence) versus those who work there (place of work). These views can overlap, as some workers both live and work in the same area.

In this section, we review the composition of the workforce based on residents who reside in the downtown study area, or by place of residence, regardless of where they work. The underlying question is the worker characteristics of the residents who choose to live downtown. This mostly demographic view contrasts with the economic view by place of work, or those who work downtown, regardless of where they live. The composition of the downtown labor force by place of work is discussed in detail in a later section of the report.

**Resident Workers.** Approximately 4,850 residents in the downtown study area were reported as actively working in 2017. Census data in Figure 29 provides an overview of employment across the five major categories of occupations as well as detailed occupational sectors within each major group for the civilian population ages 16 and over.

Across all tracts in the downtown study area, more than half (58%) of workers are employed within the single category of management, business, science and arts occupations. Downtown has a significant overweighting in the group relative to the nation (37.4%), state (34.1%), and county (36.5%) and reflects a largely professional and white-collar labor force living in the study area.

The remaining residents in the study area are distributed more evenly across sales and office occupations (19.6%), service occupations (10.5%), natural resources, construction, and maintenance occupations (6.4%), and production, transportation, and material moving occupations (5.8%).

Relative to the county, state and nation, the overweighting of jobs in management, business, science, and arts occupations results in far lower shares in the other 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.

A high share is present in most every detailed occupation within the broader management, business, science, and arts occupations group. However, much of the difference relative to the county, state and

nation is traced to just two occupations - management occupations (possibly a reflection of the preference of high earners to live in an urban setting) and health occupations (largely driven by the presence of SSM Health St. Anthony Hospital, OU Medicine, and the Research Park in the study area).

There is also a relatively high concentration of legal, architecture and engineering occupations as well as workers in arts, design, entertainment, sports and media occupations. These high shares may also reflect the ongoing shift among professionals across all fields who prefer to live in a more urban location.

Despite significant construction activity downtown and a rebound in mining activity in the state much of the past two decades, there is a relatively low share of study area residents in the construction and extraction occupations. These low shares likely reflect the tendency of construction and extraction workers to commute to a changing work location and to not typically choose their residence based on place of work.

A low share of workers in the study area is also found in occupations related to production, transportation and material moving operations. Most industrial and manufacturing activities exited the study area over the past several decades. Low occupation shares are also found for residents working in protection and public safety. There is a similar low share of workers in office and administrative support occupations among residents in the study area. Again, this does not indicate a low share of these jobs located downtown but a low share of downtown residents who work in these occupations. The low share likely reflects, in part, the relatively low average wages paid across these occupations and the above-average cost of living downtown relative to other areas in the region.

**Figure 29. Occupation of Residents in Downtown Study Area (2017)**

Occupational Classification	United States		Oklahoma		Oklahoma County		Study Area	
	Count	Share	Count	Share	Count	Share	Tracts	Share
<b>Civilian employed population 16 years and over</b>	<b>150,599,165</b>	<b>100.0%</b>	<b>1,746,419</b>	<b>100.0%</b>	<b>363,998</b>	<b>100.0%</b>	<b>4,855</b>	<b>100.0%</b>
<b>Management, business, science, and arts occupations:</b>	<b>56,391,480</b>	<b>37.4%</b>	<b>594,689</b>	<b>34.1%</b>	<b>132,781</b>	<b>36.5%</b>	<b>2,805</b>	<b>57.8%</b>
Management occupations	15,414,863	10.2%	167,287	9.6%	35,275	9.7%	723	14.9%
Business and financial operations occupations	7,330,384	4.9%	72,553	4.2%	18,307	5.0%	244	5.0%
Computer and mathematical occupations	4,337,289	2.9%	31,830	1.8%	9,266	2.5%	143	2.9%
Architecture and engineering occupations	2,768,696	1.8%	27,151	1.6%	6,548	1.8%	152	3.1%
Life, physical, and social science occupations	1,321,432	0.9%	11,378	0.7%	3,165	0.9%	118	2.4%
Community and social services occupations	2,572,116	1.7%	36,606	2.1%	7,621	2.1%	115	2.4%
Legal occupations	1,706,819	1.1%	16,250	0.9%	5,362	1.5%	211	4.3%
Education, training, and library occupations	9,099,897	6.0%	105,172	6.0%	18,649	5.1%	274	5.6%
Arts, design, entertainment, sports, and media occupations	2,977,385	2.0%	23,376	1.3%	6,285	1.7%	205	4.2%
Health diagnosing and treating practitioners and other technical occupations	6,014,096	4.0%	64,257	3.7%	15,367	4.2%	534	11.0%
Health technologists and technicians	2,848,503	1.9%	38,829	2.2%	6,936	1.9%	86	1.8%
<b>Service occupations:</b>	<b>27,064,027</b>	<b>18.0%</b>	<b>304,702</b>	<b>17.4%</b>	<b>62,461</b>	<b>17.2%</b>	<b>508</b>	<b>10.5%</b>
Healthcare support occupations	3,599,168	2.4%	43,494	2.5%	8,960	2.5%	51	1.1%
Protective service occupations:	3,246,525	2.2%	36,497	2.1%	5,879	1.6%	33	0.7%
Firefighting and prevention, and other protective service workers	1,783,914	1.2%	20,276	1.2%	3,677	1.0%	28	0.6%
Law enforcement workers including supervisors	1,462,611	1.0%	16,221	0.9%	2,202	0.6%	5	0.1%
Food preparation and serving related occupations	8,730,596	5.8%	101,686	5.8%	21,955	6.0%	235	4.8%
Building and grounds cleaning and maintenance occupations	5,878,982	3.9%	66,716	3.8%	14,523	4.0%	117	2.4%
Personal care and service occupations	5,608,756	3.7%	56,309	3.2%	11,144	3.1%	72	1.5%
<b>Sales and office occupations:</b>	<b>35,440,563</b>	<b>23.5%</b>	<b>416,270</b>	<b>23.8%</b>	<b>91,112</b>	<b>25.0%</b>	<b>951</b>	<b>19.6%</b>
Sales and related occupations	15,882,766	10.5%	178,503	10.2%	39,624	10.9%	545	11.2%
Office and administrative support occupations	19,557,797	13.0%	237,767	13.6%	51,488	14.1%	406	8.4%
<b>Natural resources, construction, and maintenance occupations:</b>	<b>13,371,659</b>	<b>8.9%</b>	<b>199,517</b>	<b>11.4%</b>	<b>39,055</b>	<b>10.7%</b>	<b>309</b>	<b>6.4%</b>
Farming, fishing, and forestry occupations	1,064,488	0.7%	11,003	0.6%	660	0.2%	22	0.5%
Construction and extraction occupations	7,585,520	5.0%	117,098	6.7%	26,195	7.2%	169	3.5%
Installation, maintenance, and repair occupations	4,721,651	3.1%	71,416	4.1%	12,200	3.4%	118	2.4%
<b>Production, transportation, and material moving occupations:</b>	<b>18,331,436</b>	<b>12.2%</b>	<b>231,241</b>	<b>13.2%</b>	<b>38,589</b>	<b>10.6%</b>	<b>282</b>	<b>5.8%</b>
Production occupations	8,842,730	5.9%	119,904	6.9%	18,170	5.0%	170	3.5%
Transportation occupations	5,537,091	3.7%	64,918	3.7%	10,746	3.0%	63	1.3%
Material moving occupations	3,951,615	2.6%	46,419	2.7%	9,673	2.7%	49	1.0%

Source: U.S. Census Bureau – American Community Survey (5-year estimates)



## V. Downtown Study Area Economic Change

Along with 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. This section of the report examines recent changes in the size and composition of the local economy in the downtown study area. Much like the population growth, 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.

**Data Sources.** The datasets used in this section are tabulated primarily from a place of work perspective. For employment, this approach examines jobs located in the study area regardless of where the worker lives. Additional focus is placed on workers living in the study area as it relates to the share who work both inside and outside the study area. A related economic development concern is the degree to which new jobs in the downtown area are being filled by workers who live in Oklahoma County versus those commuting from outside the city and county.

The primary dataset used to evaluate the downtown economy is the Census Bureau's Local Employer-Household Dynamics (LEHD) database.<sup>41</sup> The LEHD program provides data on both employees and employers by combining several federal, state, and Census Bureau datasets at the regional level. Employment, earnings, and job flows are available by either place of work or place of residence. Employment can be partitioned by industry and by demographic characteristics of workers. The most recently available year of data is 2015, however extended historical series extending back to 2002 are available for most regions, including both Census tracts and ZIP codes in the downtown study area.

LEHD data is based largely on the Bureau of Labor Statistic's Quarterly Census of Employment and Wages (QCEW) data program which is derived from state Unemployment Insurance (UI) administrative data. Data coverage under LEHD includes employees covered by state UI programs and some federal employees but excludes military, self-employed, and non-covered federal employees. Overall coverage remains quite high, with approximately 95% of all private employment covered.

Data are also derived from the Census Bureau's ZIP Code Business Patterns (ZBP) database. This dataset provides an extensive historical series stretching back to 1994 and provides an alternative view of the long-run trend in employment during the MAPS era. More importantly, it provides data on the number of business establishments and the amount of payroll received by employees in the area. As its name implies, data is available at the ZIP code level.

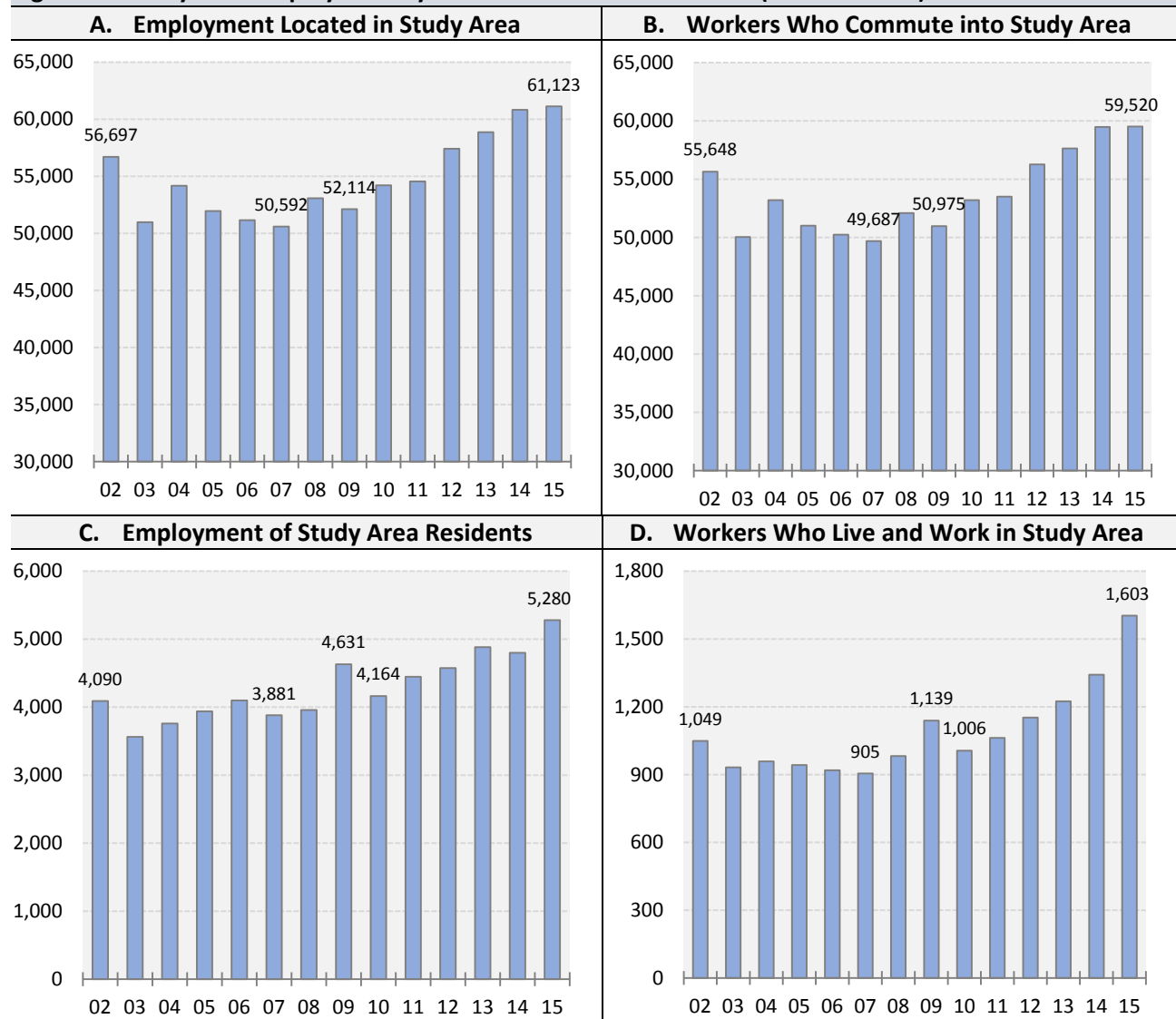
### Downtown Employment Trend

Panel A of Figure 30 illustrates the trend in employment by place of work in the downtown study area in the 2002 to 2015 period. More than 61,100 jobs were reported across the 14 Census tracts in the study area in 2015, the most recent year of data available. Again, this measure includes all jobs located in the downtown study area, regardless of where workers live.

**Downtown Job Growth.** Much like accelerating population growth, a distinct acceleration in downtown job growth has taken place since approximately 2009. More than 9,000 jobs were added in the study area since 2009, a 17.3% 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%), metro area (12.5%), and state (8.0%) levels in the period.

**Figure 30. Study Area Employment by Place of Work and Residence (Census Tracts)**



Source: U.S. Census Bureau. LEHD Origin-Destination Employment Statistics Data at <https://lehd.ces.census.gov/data/#/nodes>

Some slowing in job growth is present in 2015 but mostly reflects the state-level energy-driven recession that extended through both 2015 and 2016. A similar slowing is present at both the county, metro, and state levels in the period.

**In-Commuting Workers.** The downtown area, particularly the central business district, is home to a significant base of in-commuting workers. Downtown experiences a temporary surge in population each workday as workers who reside outside the area commute in for work. Commute times from the fringe of the metropolitan area to downtown remain comparatively short and allow for significant labor supply to originate from several surrounding counties.

Most new workers in the study area since 2009 commute to downtown from outside the relatively small study area. In 2015, more than 59,500 (97.4%) of the 61,100 jobs in the study area were held by residents who live outside the area (see panel B of Figure 30). 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.

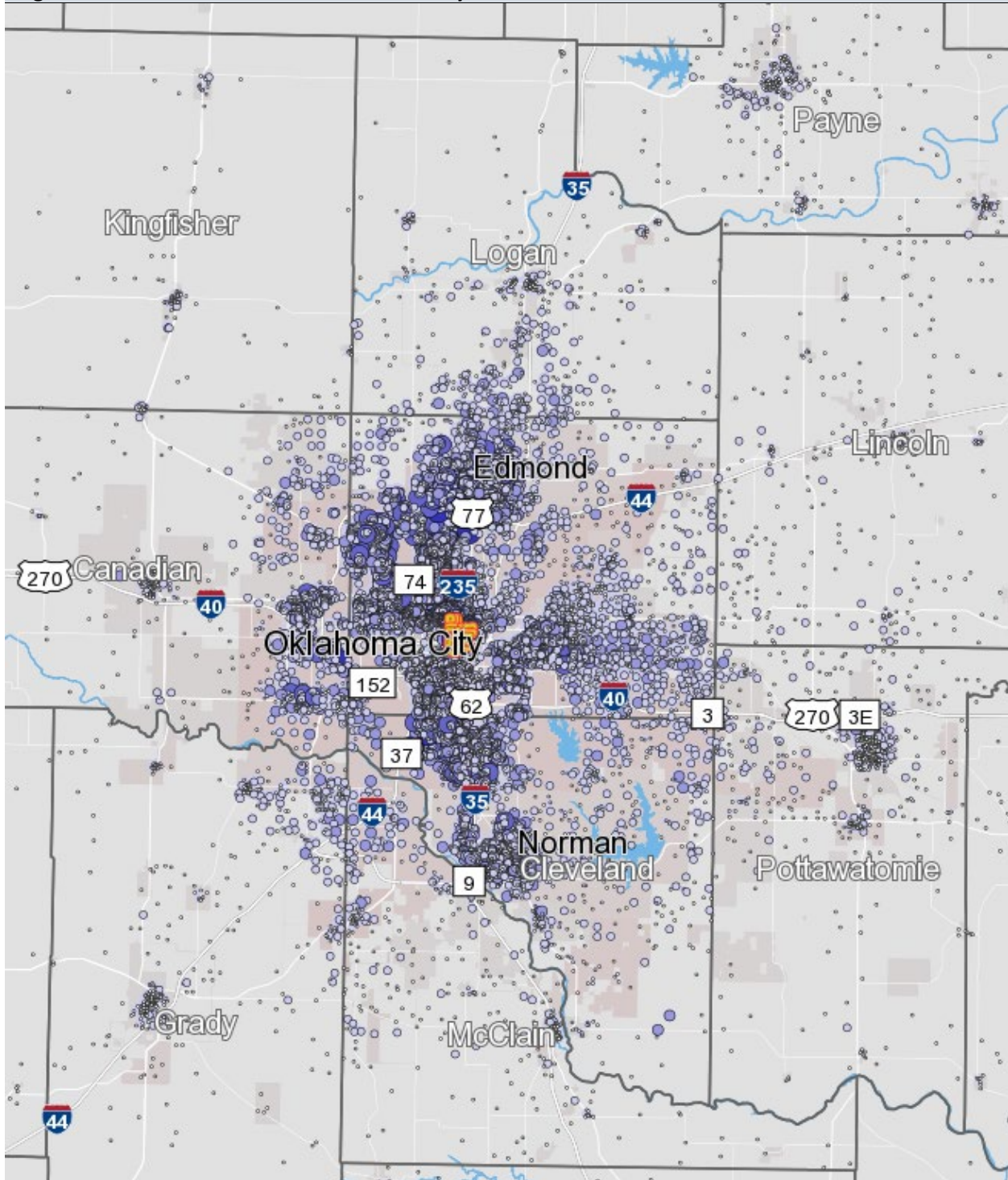
**Residence of New Downtown Workers.** A fundamental economic development concern within the MAPS projects is the home location of workers who are benefitting from newly created jobs in the study area. While all workers cannot come from the relatively small downtown study area, drawing workers from nearer regions, particularly the city and county, is generally preferred to long-distance commuters. From a city development perspective, new workers who live within the city and county will purchase and rent housing, participate in city schools, shop locally, and contribute in other ways to Oklahoma City's growth. Given that Oklahoma City comprises a large share of the county, the share of net new jobs accruing to workers residing in Oklahoma County provides a useful measure of the local labor market success of MAPS.

Figure 31 summarizes net job gains in the 2009 to 2015 period based on the county of residence for workers in the downtown study area. The map in Figure 32 provides a visual overview of the location and density of the residence location of all workers in the study area.

The key finding in the period is that job gains in the downtown study area have been filled primarily by workers who are living in Oklahoma County. Two-thirds (5,999) of the 9,009 net new jobs downtown reported in the period were filled by residents living in the central county. The total number of Oklahoma County residents working in the study area increased by 20.4% in the period to a total of 35,432, exceeding the overall downtown job gain of 17.3% in the period.

<b>Figure 31. Downtown Study Area Job Growth by County Where Worker Lives</b>							
<b>County</b>	<b>2015</b>		<b>2009</b>		<b>2009-2015</b>		
	<b>Jobs</b>	<b>Share</b>	<b>Jobs</b>	<b>Share</b>	<b>Change</b>	<b>%Change</b>	<b>Share</b>
<b>All Counties</b>	<b>61,123</b>	<b>100.0%</b>	<b>52,114</b>	<b>100.0%</b>	<b>9,009</b>	<b>17.3%</b>	<b>100.0%</b>
<b>Oklahoma County, OK</b>	35,432	58.0%	29,433	56.5%	5,999	20.4%	66.6%
<b>Cleveland County, OK</b>	9,094	14.9%	8,045	15.4%	1,049	13.0%	11.6%
<b>Canadian County, OK</b>	4,698	7.7%	3,718	7.1%	980	26.4%	10.9%
<b>Tulsa County, OK</b>	2,133	3.5%	2,755	5.3%	-622	-22.6%	-6.9%
<b>Logan County, OK</b>	1,030	1.7%	871	1.7%	159	18.3%	1.8%
<b>Pottawatomie County, OK</b>	954	1.6%	813	1.6%	141	17.3%	1.6%
<b>Grady County, OK</b>	917	1.5%	749	1.4%	168	22.4%	1.9%
<b>McClain County, OK</b>	800	1.3%	661	1.3%	139	21.0%	1.5%
<b>Comanche County, OK</b>	528	0.9%	412	0.8%	116	28.2%	1.3%
<b>Payne County, OK</b>	448	0.7%	363	0.7%	85	23.4%	0.9%
<b>Creek County, OK</b>	320	0.5%	291	0.6%	29	10.0%	0.3%
<b>All Other Locations</b>	4,769	7.7%	4,003	7.6%	766	19.1%	8.5%

Source: U.S. Census Bureau. LEHD Origin-Destination Employment Statistics Data at <https://onthemap.ces.census.gov/>

**Figure 32. Home Location of Downtown Study Area Workers**

Source: U.S. Census Bureau. LEHD Origin-Destination Employment Statistics Data at <https://onthemap.ces.census.gov/>

The greatest concentrations of downtown workers living in Oklahoma County are located along the I-35, I-40, and I-44 corridors; the Northwest Expressway corridor; and along the Kilpatrick Turnpike.

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.

Significant numbers of downtown workers continue to commute long distances from counties with large population pools such as Pottawatomie County (954 workers), Comanche County (528 workers), and Payne County (448 workers). Many workers also commute from other surrounding counties with smaller population centers including Logan County (1,030 workers), Grady County (917 workers), McClain County (800 workers), and Creek County (320 workers).

Another notable shift in labor supply to the downtown study area is a reduced reliance on the number of downtown workers commuting from Tulsa County. A decline of more than 600 Tulsa County-based workers (22.6% decline) is reported in the period. Despite the decline, approximately 2,100 workers still report commuting from Tulsa County for work in the downtown study area in 2015.

**Resident Workers.** 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% through 2015, or a total of 5,280 workers (see Panel C of Figure 30). Even when measured from the temporary spike in hiring in 2009 when the general downtown job recovery began, employment among study area residents was still up 14.0% through 2015. Strong overall employment gains for those living downtown is a critical measure of success in developing a larger residential base of workers in the study area, part of whom will commute outward for work in other areas of the city and region.

**Residents Living and Working Downtown.** The focus of MAPS on placemaking suggests that those who are both living and working downtown should undergo above-average growth as well. The data suggest there are encouraging differences in the share of the 9,000 net new jobs in the downtown study area that were filled by downtown residents versus in-commuters (see panels C and D of Figure 30).

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 in 2015, a 59% gain in the period. Though the absolute numbers are smaller than for commuters, growth rates are far larger and suggest an important ongoing shift in the labor supply of the region.

This shift in labor supply toward local residents is an early sign of future shifts in the structure of the labor market in the study area and is a highly anticipated outcome of MAPS. Typically referred to as employment efficiency, a high share of local residents employed locally is a key component of the urban development strategy implemented within MAPS whereby downtown becomes a more desirable place to both live and work.

Residents both living and working in the study area are profiled by age and wage level in Figure 33. Two major trends are present among these worker-residents:

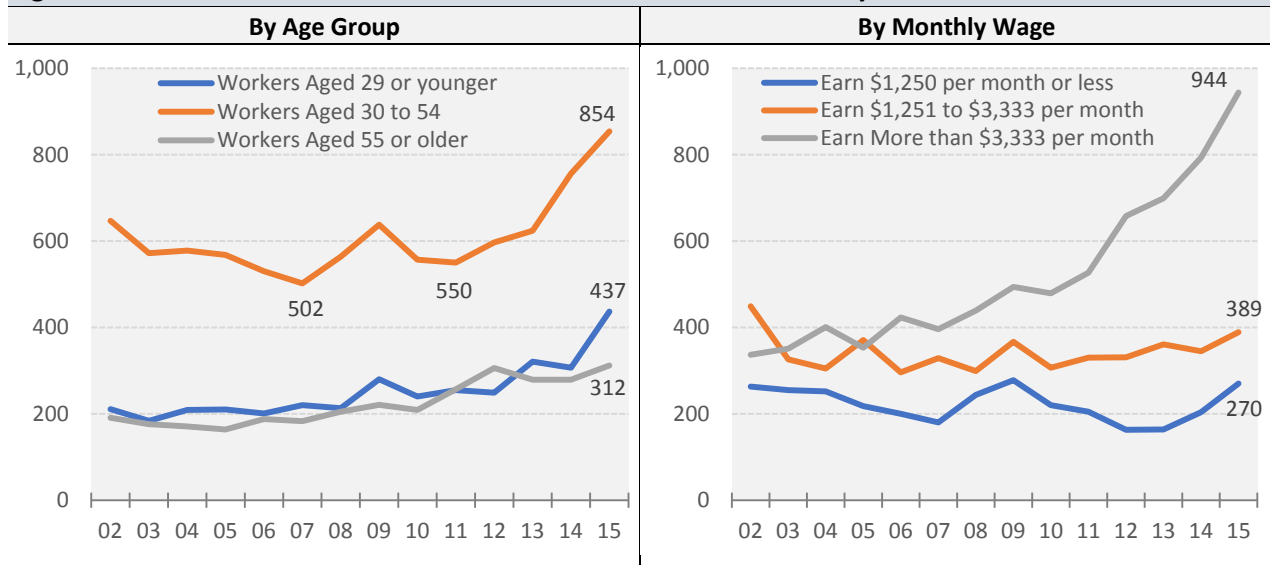
1. Most of the new jobs are held by workers ages 30 to 54, with a total of 854 in 2015. This reflects a gain of about 300 since 2011 and 350 since 2007. In addition, rapid growth is taking place more recently among workers ages 29 and younger, another segment of the workforce that is a priority of the MAPS projects. An estimated 437 persons ages 29 and younger were both living



and working in the downtown study area in 2015, up from only about 200 as recently as 2008. The weakest job gains were among those ages 55 and over, yet the number of workers in this group is up as well, increasing by approximately 100 since 2008.

- Recent growth in the number of workers who both live and work downtown is found almost exclusively among workers in the highest wage category. LEHD data on monthly earnings are available for 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 work at lower-paying jobs located downtown, the number has remained flat or fallen slightly since 2002.

**Figure 33. Characteristics of Residents Who Live and Work in the Study Area**



Source: U.S. Census Bureau. LEHD Origin-Destination Employment Statistics Data at <https://lehd.ces.census.gov/data/#lodes>

**Employment Profile by Census Tract.** Figure 34 provides a detailed profile of workers for each Census tract in the downtown study area in 2015 using LEHD data. The size and composition of the employment base is broken down along several economic and demographic factors. Again, employment reflects workers in the study area, regardless of where they live.

By location, 96% of all jobs (approximately 59,000) in the study area are in the group of ten south tracts in the downtown study area. The remaining 4% of jobs are in the three heavily residential northern tracts (1,938 jobs) and tract 1040 (228 jobs) south of I-40. The heaviest job concentration in the north is found in tract 1016 (far north) which is home to a reported 1,304 jobs.

More than half (55% or 33,878 jobs) of all employment in the study area is concentrated in just two tracts – 1036.01 (downtown including Myriad Gardens and Civic Center, 20,299 jobs) and 1027 (OU Health Sciences, 13,579 jobs). This concentration reflects the intensive use of space in both the central business district and at the OU Health Sciences campus.

More than 5,000 jobs are located within each of three additional tracts – 1025 (St. Anthony Hospital, 5,966 jobs), 1091 (Automobile Alley to Cox Center, 7,646 jobs), and 1038 (Bricktown and Deep Deuce, 5,116 jobs).

Tracts in the south containing between 1,000 and 5,000 jobs include 1030 (South OU Health Center, 1,029 jobs), 1032 (National Memorial and Jail, 2,997 jobs), and 1037 (Union Station, 1,042 jobs).

**Employment by Industry.** The four greatest concentrations of workers by NAICS sector are in health care, education (primarily medical), public administration (city, state, and federal government), and mining. These four represent the traditional sectors of employment concentration in the downtown area and 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 OU Health Science Center (primarily tract 1027) is home to a combined 12,200 workers in the educational services and health care sectors. Across the full study area, more than 11,300 workers are in health care jobs, the largest number of workers in any single major industry sector. More than 4,200 of the area's health care workers are employed in tract 1025 which includes St. Anthony Hospital.

Approximately 6,700 public administration jobs are in the study area, reflecting high numbers of city, state, and federal government employees. Most public administration workers are based in the central business district in tract 1036.01 (downtown including Myriad Gardens and Civic Center). The largest concentration of federal employees is found at the federal campus in tract 1032.

About 4,100 mining sector (primarily oil and gas) workers are reported across the study area, with nearly all located in the Business District in tract 1036.01 (downtown including Myriad Gardens and Civic Center). This tract captures the high concentration of energy sector workers at both Devon Tower and Leadership Square.

The study area is also home to nearly 5,300 jobs in the high-skill professional, scientific, and technical services sector. These jobs are distributed across almost all tracts in the study area but are concentrated heavily in tracts 1091 (Automobile Alley to Cox Center) and 1036.01 (downtown including Myriad Gardens and Civic Center) where they represent 20% and 9% of total jobs, respectively.

More than 1,400 jobs in the utilities sector are in the central business district in tract 1036.01, reflecting the downtown location of OG&E, the state's largest utility provider.

Among other services categories, more than 2,200 accommodation and food services jobs are reported in Bricktown and Deep Deuce located to the east in tract 1038.

**Employment by Earnings Level.** The greatest numbers of the highest wage jobs (more than \$3,333 per month) are found in tracts 1027 (OU Health Science Center, 7,001 jobs) and 1036.01 (downtown including Myriad Gardens and Civic Center, 13,597 jobs) where 52% and 67% of jobs, respectively, are in the highest wage group.

Large numbers of jobs in the highest wage group are also concentrated in tracts 1025 (St. Anthony Hospital, 2,406 jobs) and 1091 (Automobile Alley to Cox Center, 3,590 jobs).

Tracts with high numbers of jobs with monthly earnings in the lowest wage group include tract 1038 (Bricktown and Deep Deuce, 1,816 workers), which reflects low average wages and more part-time employment in food services, and tract 1036.01 (downtown including Myriad Gardens and Civic Center, 2,406 jobs) which is the largest tract overall measured by total employment. Nevertheless, only 12% of

workers in tract 1036.01 report earning \$1,250 per month or less versus 35% in tract 1038 (Bricktown and Deep Deuce).

Among the northern residential tracts, tract 1016 (far north) has both the highest number and share of jobs in the highest wage group. Both tract 1017 (Heritage Hills) and tract 1018 (Mesta Park) in the north have small numbers of jobs and most fall within the lower wage groups. Tract 1040 south of I-40 similarly has a small number of jobs with most paying lower wages.

**Figure 34. Work Area Profile (2015)**

	Downtown Census Tracts																
	North Tracts			South Tracts													
	1016	1017	1018	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	1040	North	South	All Tracts
<b>Total All Jobs</b>	1,304	368	266	5,966	638	13,579	1,029	7,646	2,997	20,299	645	1,042	5,116	228	1,938	58,957	61,123
<b>Jobs by Worker Age</b>																	
Age 29 or younger	265	81	84	1,273	150	2,652	254	1,635	566	3,668	139	240	1,955	29	430	12,532	12,991
Age 30 to 54	757	193	140	3,386	353	7,842	614	4,142	1,703	12,091	345	520	2,407	130	1,090	33,403	34,623
Age 55 or older	282	94	42	1,307	135	3,085	161	1,869	728	4,540	161	282	754	69	418	13,022	13,509
<b>Jobs by Earnings</b>																	
\$1,250 per month or less	144	116	94	1,065	72	1,438	185	1,880	618	2,406	166	305	1,816	40	354	9,951	10,345
\$1,251 to \$3,333 per month	542	133	120	2,495	299	5,140	432	2,176	1,226	4,296	307	417	1,860	103	795	18,648	19,546
More than \$3,333 per month	618	119	52	2,406	267	7,001	412	3,590	1,153	13,597	172	320	1,440	85	789	30,358	31,232
<b>Jobs by NAICS Industry Sector</b>	1016	1017	1018	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	1040	North	Other	All Tracts
Agriculture, Forestry, Fishing and Hunting	0	0	0	0	0	0	0	0	0	13	0	0	0	0	0	13	13
Mining, Quarrying, and Oil and Gas Extraction	0	0	2	34	0	0	0	206	6	3,826	0	0	20	0	2	4,092	4,094
Utilities	0	0	0	0	0	0	0	1	0	1,439	0	28	0	0	0	1,468	1,468
Construction	95	2	6	22	2	0	0	128	17	668	58	249	136	0	103	1,280	1,383
Manufacturing	253	4	3	49	4	159	11	74	70	34	37	39	57	20	260	534	814
Wholesale Trade	56	15	5	41	18	2	0	240	64	270	199	17	128	32	76	979	1,087
Retail Trade	225	39	2	56	9	5	0	147	52	232	31	120	539	17	266	1,191	1,474
Transportation and Warehousing	9	0	0	0	6	0	11	11	3	345	14	10	33	49	9	433	491
Information	25	0	8	10	0	3	42	330	50	618	25	0	236	0	33	1,314	1,347
Finance and Insurance	32	51	30	28	44	95	220	389	176	549	20	0	25	0	113	1,546	1,659
Real Estate and Rental and Leasing	21	10	4	85	3	1	4	148	22	286	19	0	37	2	35	605	642
Professional, Scientific, and Technical Services	141	100	29	429	17	107	278	1,504	242	1,835	61	57	473	0	270	5,003	5,273
Management of Companies and Enterprises	167	0	0	152	0	0	0	1,659	0	1,029	0	0	257	0	167	3,097	3,264
Admin., Support, Waste Mgt & Remediation	27	5	19	253	12	381	134	1,322	620	1,928	26	2	197	0	51	4,875	4,926
Educational Services	0	3	0	35	0	7,466	53	42	0	55	1	5	233	0	3	7,890	7,893
Health Care and Social Assistance	73	44	82	4,244	337	4,729	125	43	1,009	43	38	350	140	44	199	11,058	11,301
Arts, Entertainment, and Recreation	1	0	0	9	0	4	0	136	118	889	5	39	224	0	1	1,424	1,425
Accommodation and Food Services	26	56	76	450	39	541	125	808	87	192	90	100	2,223	0	158	4,655	4,813
Other Services (excluding Public Admin.)	84	39	0	44	36	0	16	313	146	125	20	24	158	64	123	882	1,069
Public Administration	69	0	0	25	111	86	10	145	315	5,923	1	2	0	0	69	6,618	6,687

*Continued*

**Figure 34. (Cont.) Work Area Profile (2015)**

	Downtown Census Tracts																	
	North Tracts			South Tracts														
Jobs by Worker Race	1016	1017	1018	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	1040	North	South	All Tracts	
White Alone	1,010	282	194	4,498	484	10,421	702	6,185	2,337	16,374	516	762	4,071	191	1,486	46,350	48,027	
Black or African American Alone	182	57	49	833	85	1,523	230	829	372	2,358	61	204	582	23	288	7,077	7,388	
American Indian or Alaska Native Alone	44	10	7	209	33	438	39	258	156	691	20	36	183	9	61	2,063	2,133	
Asian Alone	24	7	5	266	16	864	34	152	55	333	28	18	105	2	36	1,871	1,909	
Native Hawaiian or Other Pacific Islander Alone	1	0	0	4	1	11	0	8	2	9	1	1	7	0	1	44	45	
Two or More Race Groups	43	12	11	156	19	322	24	214	75	534	19	21	168	3	66	1,552	1,621	
	1,304	368	266	5,966	638	13,579	1,029	7,646	2,997	20,299	645	1,042	5,116	228	1,938	58,957	61,123	
Jobs by Worker Ethnicity	1016	1017	1018	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	1040	North	Other	All Tracts	
Hispanic or Latino	151	28	15	376	42	858	69	525	166	1,061	69	120	544	160	194	3,830	4,184	
Not Hispanic or Latino	1,153	340	251	5,590	596	12,721	960	7,121	2,831	19,238	576	922	4,572	68	1,744	55,127	56,939	
White Alone	77.5%	76.6%	72.9%	75.4%	75.9%	76.7%	68.2%	80.9%	78.0%	80.7%	80.0%	73.1%	79.6%	83.8%	76.7%	78.6%	78.6%	
Black or African American Alone	14.0%	15.5%	18.4%	14.0%	13.3%	11.2%	22.4%	10.8%	12.4%	11.6%	9.5%	19.6%	11.4%	10.1%	14.9%	12.0%	12.1%	
American Indian or Alaska Native Alone	3.4%	2.7%	2.6%	3.5%	5.2%	3.2%	3.8%	3.4%	5.2%	3.4%	3.1%	3.5%	3.6%	3.9%	3.1%	3.5%	3.5%	
Asian Alone	1.8%	1.9%	1.9%	4.5%	2.5%	6.4%	3.3%	2.0%	1.8%	1.6%	4.3%	1.7%	2.1%	0.9%	1.9%	3.2%	3.1%	
Native Hawaiian or Other Pacific Islander Alone	0.1%	0.0%	0.0%	0.1%	0.2%	0.1%	0.0%	0.1%	0.1%	0.0%	0.2%	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	
Two or More Race Groups	3.3%	3.3%	4.1%	2.6%	3.0%	2.4%	2.3%	2.8%	2.5%	2.6%	2.9%	2.0%	3.3%	1.3%	3.4%	2.6%	2.7%	
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Hispanic or Latino	11.6%	7.6%	5.6%	6.3%	6.6%	6.3%	6.7%	6.9%	5.5%	5.2%	10.7%	11.5%	10.6%	70.2%	10.0%	6.5%	6.8%	
Not Hispanic or Latino	88.4%	92.4%	94.4%	93.7%	93.4%	93.7%	93.3%	93.1%	94.5%	94.8%	89.3%	88.5%	89.4%	29.8%	90.0%	93.5%	93.2%	
Jobs by Worker Educational Attainment	1016	1017	1018	1025	1026	1027	1030	1091	1032	1036.01	1036.02	1037	1038	1040	North	Other	All Tracts	
Less than high school	131	24	21	470	60	924	104	671	272	1,481	80	160	477	35	176	4,699	4,910	
High school or equivalent, no college	370	76	48	1,247	121	2,489	222	1,616	738	4,212	156	264	848	78	494	11,913	12,485	
Some college or Associate degree	342	108	66	1,665	169	3,685	250	1,926	788	5,663	162	220	1,039	51	516	15,567	16,134	
Bachelor's degree or advanced degree	196	79	47	1,311	138	3,829	199	1,798	633	5,275	108	158	797	35	322	14,246	14,603	
Educational attainment not available	265	81	84	1,273	150	2,652	254	1,635	566	3,668	139	240	1,955	29	430	12,532	12,991	
Jobs by Worker Sex																		
Male	859	154	132	1,916	242	4,284	503	3,894	1,494	12,742	407	649	2,633	127	1,145	28,764	30,036	
Female	445	214	134	4,050	396	9,295	526	3,752	1,503	7,557	238	393	2,483	101	793	30,193	31,087	

Source: U.S. Census Bureau. LEHD Origin-Destination Employment Statistics Data at <https://lehd.ces.census.gov/data/#/lodes>

## Employment Growth - ZIP Codes

Figure 35 provides an additional view of employment trends using the four ZIP codes in the downtown study area – 73102, 73103, 73104, and 73106. ZIP Code Business Patterns data is especially informative because it provides a longer historical view of trends across the 1994 to 2016 period. The database also tracks the number business establishments and amount of payroll paid by firms within each ZIP code. The use of ZIP codes further maintains continuity with several findings in the 2009 report.

**Employment.** ZIP code-based employment estimates for the study area are detailed in panel A of Figure 35. As with the LEHD dataset, the ZIP code analysis confirms a surge in hiring in recent years following an extended period of relatively stagnant business activity.

Little net hiring growth took place in the study area from the Oil Bust in the early 1980s through the late 2000s. Total employment in the downtown study area has since posted strong gains following the end of the recent national recession in 2009. More than 8,800 jobs were added between 2009 and 2016, a 22% gain in the period. Total jobs in the four primary downtown ZIP codes surged to more than 48,716 in 2016.

The job gain in the study area also far exceeds the reported 5.4% gain statewide, 7.7% gain countywide, and 7.6% gain for the metropolitan area in the 2009 to 2016 period using comparable measures.<sup>42</sup>

The overall size and timing of job gains reported at the ZIP code level closely reflect the job gains reported in LEHD data at the Census tract level. The ZIP code data also confirm a strong hiring performance downtown relative to the broader regional economy.

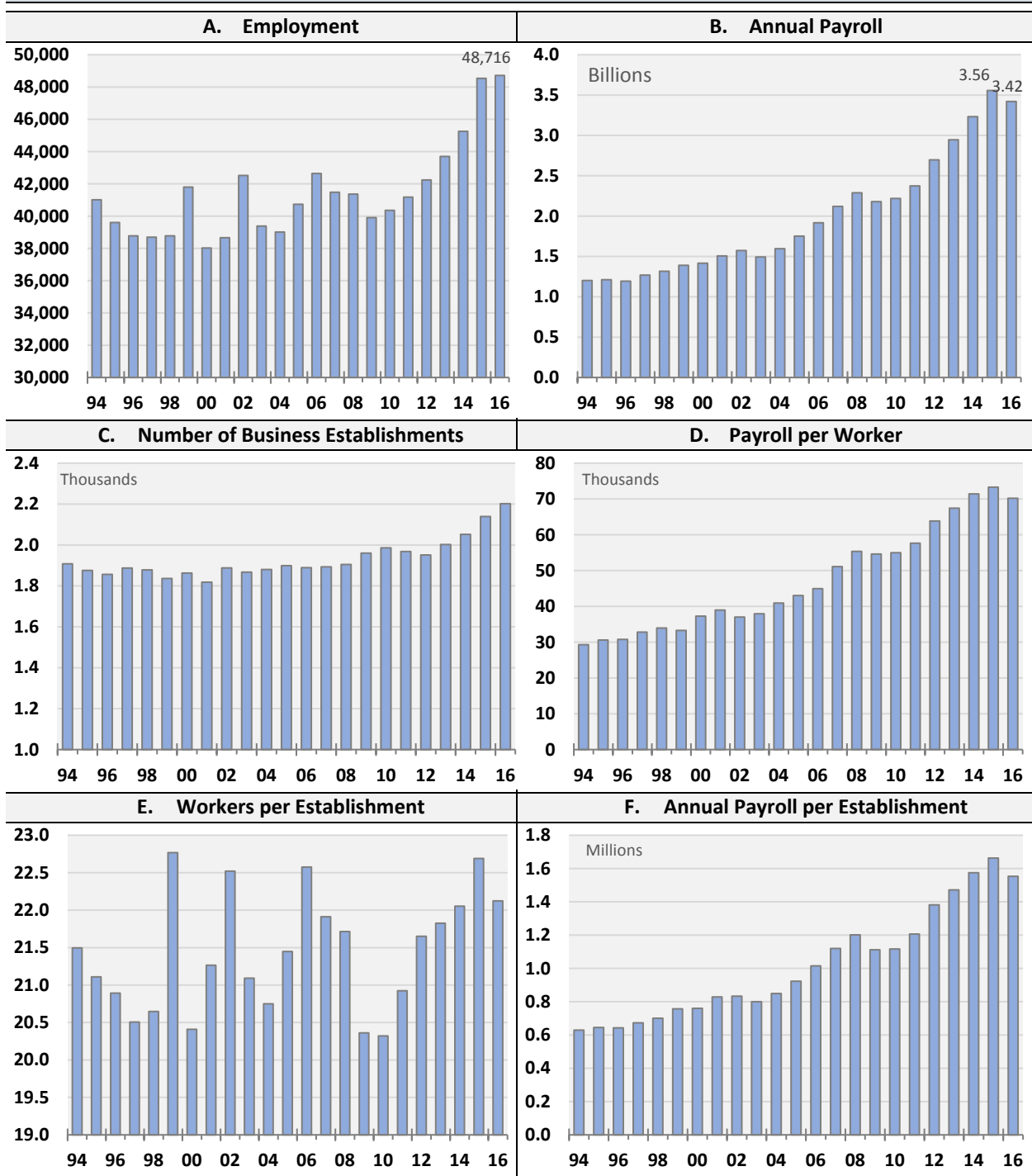
**Earnings.** Payroll at firms operating in the four primary ZIP codes similarly accelerated beginning in 2009 (see panel B of Figure 35). Total annual payroll increased from \$2.2 billion in 2009 to more than \$3.4 billion in 2016 – a 57% increase. Downtown far outpaced payroll gains across the broader region. The 57% gain downtown was more than double the 26.4% gain statewide, 27.8% gain countywide, and 26.8% gain in the metropolitan area in the period.

Recent downtown payroll gains have also far exceeded historical gains. For comparison, payroll growth from 1995 to 2009 averaged 4.2% annually versus acceleration to 6.8% annually between 2009 and 2016. Again, 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 were more than double the pace of reported employment gains in the period. This has resulted in far higher pay per worker in the study area since 2009 (see panel D of Figure 35). Average payroll per worker increased from \$54,600 in 2009 to \$70,200 in 2016, a 29% 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% relative to the state, 52% relative to the county, and 63% relative to the metropolitan area.



**Figure 35. Business Establishment and Employment Profile for ZIP Code Study Area (2016)**

Source: U.S. Census Bureau ZIP Code Business Patterns

Notes: The downtown study area ZIP codes include 73102, 73103, 73104, and 73106

**Establishments.** Business establishment growth in the U.S. and in many states has been sluggish for more than two decades. The downtown study area ZIP codes similarly experienced an extended period of little sustained business formation from 1994 to 2012 (see panel C of Figure 35).

However, following the recent bottom in activity in 2012, establishment growth resumed in the downtown study area, adding 250 net new establishments (13% gain) through 2016. A reported total of 2,200 business establishments were operating in the study area in 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%), metro area (5.3%), state (2.5%), and nation (4.4%).

The number of workers per establishment has also increased steadily since reaching a recent low in 2010, rising from about 20.3 to 22.1 workers per establishment through 2016 (see panel E of Figure 35).

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% gain in the period (see panel F of Figure 35).

## VI. MAPS Investment – Public and Private

Large-scale public infrastructure projects like MAPS are typically accomplished only through state and local government coordination and funding. The large public investment undertaken 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 a rebound in population, housing, employment, and business formation in downtown discussed in prior sections of the report, a similar rebound was anticipated in the form of increased private investment in housing, office, retail, and other areas of development.

This section of the report provides an overview of cumulative public investment in the MAPS projects along with estimates of private investment in the downtown study area in the MAPS era. Findings indicate continued strength in both private and public investment downtown since 2009. The critical housing and office markets are both 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.

### MAPS Investment – MAPS, MAPS for Kids, MAPS 3

Figure 36 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 total cost at the time of project approval. 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 in MAPS.

Figure 36. 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%
<b>Total</b>	<b>\$1,811.0</b>	<b>100.0%</b>	<b>\$2,315.6</b>	<b>100.0%</b>

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 Adjustment.** Given both the pay-as-you-go model underlying MAPS and the extended time period that has elapsed across projects, inflation adjustments provide for a more useful comparative measure of total cost in current dollars. Because only limited data is available for partitioning the cost of each MAPS project to individual years in which funding was spent, the cost of each project is determined at the point the funds were raised rather than spent. The midpoint of the life of the temporary sales tax for each project is used as the point for inflation adjustment.<sup>43</sup>

**Inflation Adjusted Investment.** Figure 36 details the estimate of \$2.32 billion in 2018 inflation-adjusted dollars for the three rounds of MAPS projects. The inflation differential is approximately 28% above the initial \$1.81 billion cost of the projects. This relatively small inflation differential reflects the historically low inflation environment in place over much of the past 25 years.

The portion of total cost devoted to the three MAPS initiatives shifts after inflation adjustment, with spending on the three rounds of projects becoming more evenly balanced. The initial MAPS projects now comprise about 25% of the total, at \$569 million in 2018 dollars. MAPS for Kids retains the same approximate share of the total cost (39%), with an inflation-adjusted cost of \$903 million. MAPS 3 is no longer the largest of the three initiatives after inflation-adjustment, dropping to only 36% 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. For this evaluation, 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 public and private investment for the downtown study area are detailed in Figure 37. Estimates from the 2009 MAPS report covering the 1995 to 2008 period are combined with more recent estimates for the 2009 to 2018 period. The more recent estimates are formed using historical reports of construction activity for completed and underway projects from 2009 through 2018.<sup>44</sup>

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.

**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 (see Figure 37).

Total public sector investment comprised less than one-third (30.7%) 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%) of all public investment projects between 1995 and 2008.

Private investment of \$2.18 billion from 1995 to 2008 comprises nearly 70% 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).

<b>Figure 37. Public and Private Investment - MAPS &amp; Downtown Study Area</b>				
	<b>Investment (millions)</b>			<b>% Share</b>
	<b>1995-2008</b>	<b>2009-2018</b>	<b>Total</b>	
<b>Public</b>				
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%
<b>Total Public</b>	<b>\$961.3</b>	<b>\$2,143.3</b>	<b>\$3,104.6</b>	<b>44.6%</b>
<b>Private</b>				
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%
<b>Total Private</b>	<b>\$2,180.6</b>	<b>\$1,681.0</b>	<b>\$3,861.6</b>	<b>55.4%</b>
<b>Total Public and Private</b>	<b>\$3,141.9</b>	<b>\$3,824.3</b>	<b>\$6,966.2</b>	<b>100.0%</b>

Note: The two time periods of investment displayed in Figure 37 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, Mc-Graw Hill Dodge Reports, and RegionTrack

**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%) 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 underway 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% of total new investment in the period. Other city-related investment totaled \$682 million, or 10% of total investment. Other public sector entities invested \$598 million in the study area, or 9% 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 completed (or is currently underway) in the study area. Private investment comprised more than half (56%) 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 important economic shift anticipated from the MAPS projects is the stimulation of private investment. As detailed in the prior section, private investment projects totaled an estimated \$3.86 billion in the downtown study area across the MAPS era and \$1.68 billion from 2009 to 2018.

An additional viewpoint of the effect of MAPS on the downtown study area is the assessment of changes in property values. Added private investment can produce property valuation gains through two distinct channels. First, is the value of direct investment expenditures made to construct new structures or upgrade existing ones. These expenditures also typically include business personal property including equipment, fixtures, and leasehold improvements. The second channel is through spillover effects generated by added direct investment on other properties as reflected in a general rise in property values in the area.

**Assessment Data.** Both direct private investment and changes in overall property valuations can be measured using county assessment data. Most private investment is subject to property tax reporting and estimates of market value are prepared annually by the assessor. 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 in this section of the report:<sup>45</sup>

1. Valuations used in the report typically include both real property (land and structures) and business personal property. Approximately 10% of total valuation is attributable to business personal property in tax year 2017.
2. Publicly-owned property is generally not subject to property taxes and is not captured by the estimates. Hence, the assessor data does not capture the value of substantial public property owned by federal, state, and local government in the downtown area. Significant assets located in tract 1027 (OU Health Center) are exempt.



3. Not all market valuations are updated by the assessor on an annual basis and reflect only the most recent valuation assigned by the assessor. Properties that are subject to constitutional annual limits on value increases may be assessed at a level well below the current market value.
4. While real property tends to increase in value over time, personal property valuations tend to depreciate annually and decline over time, thereby reducing the overall valuation of a property.
5. Valuation changes can reflect new construction, remodeling, tenant fixtures, land revaluations, demolition, and other activities.
6. Valuations are reported for each tax year, which typically correspond to the prior calendar year.
7. The estimates reported exclude the value of assets in the study area that are centrally assessed by the Oklahoma Tax Commission (e.g. pipelines).

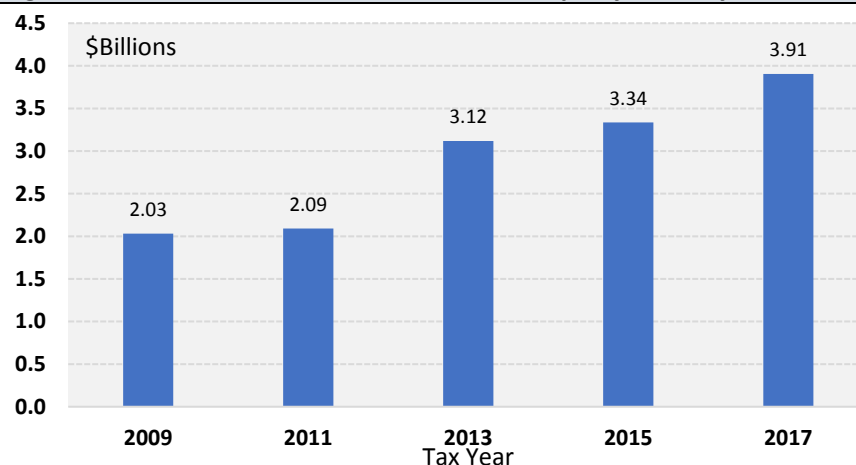
**Rising Downtown Property Values.** Figure 37 details assessor determined market valuations in the study area at two-year intervals from 2009 to 2017. Across all tracts in the study area, market value nearly doubled (92% increase) from \$2.03 billion in 2009 to \$3.91 billion in 2017. Again, this property is primarily privately owned and does not include the increased valuation of publicly owned property.

For perspective, the \$1.88 billion gain in assessed property valuation since 2009 is slightly higher than the \$1.81 million in total public expenditures on all MAPS programs approved to date.

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

The increased valuation in the study area is approximately triple the 31% increase in market valuations countywide in the period. Due to faster growth in the downtown study area, the share of total county property valuation located in the study area increased from 4.0% in 2009 to 5.9% 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.

**Figure 38. Total Market Value of Assessed Property in Study Area**



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

**Widespread Gains.** Across the full 2009 to 2017 period, property valuations experienced at least double-digit growth in every Census tract in the study area. Figure 38 summarizes total valuations for each tract

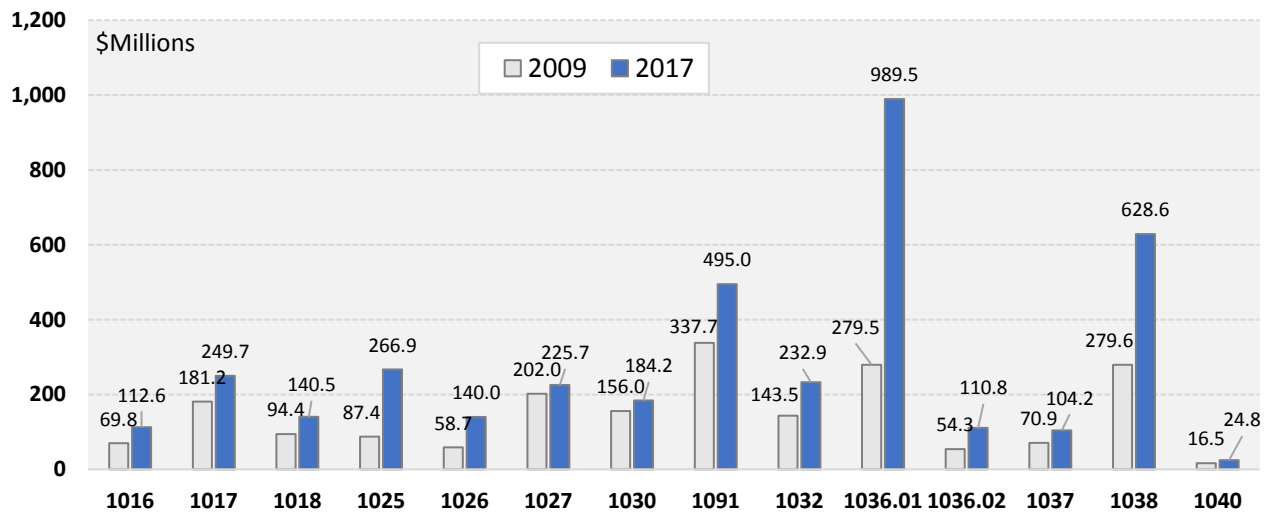
in 2009 and 2017. Figure 39 provides detailed valuation estimates for each Census tract in the study area at two-year intervals.

The largest percentage and absolute gains are found in tract 1036.01 (downtown and Myriad Gardens, 254% gain). This large gain reflects the completion of Devon Tower in the central business district in late 2012. The more than \$700 million office complex ranks as the 49th tallest building (844 feet) in the U.S. and is now the dominant structure in the downtown Oklahoma City skyline.<sup>46</sup>

Other tracts posting a more than doubling in property valuation in the full period include tract 1025 (St. Anthony Hospital, 205% gain), tract 1026 (Oklahoma Department of Commerce, 138% gain), tract 1036.02 (Police Department and Municipal Courts, 104% gain), and tract 1038 (Bricktown and Deep Deuce, 125%). All four of these tracts are experiencing visible and significant revitalization including both redevelopment of existing structures and substantial new construction.

By increase in dollar value, the largest valuation gains are reported in tract 1036.01 (downtown and Myriad Gardens, \$710 million) and tract 1038 (Bricktown and Deep Deuce, \$349 million). Other property value gains of \$150 million or more are found in tract 1025 (St. Anthony Hospital, \$180 million) and tract 1091 (Automobile Alley to Cox Center, \$157 million).

**Figure 39. Total Market Value of Assessed Property by Census Tract**



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

The greatest concentration of total property value is now located in tract 1036.01 (\$990 million) in the business district following completion of Devon Tower. This is up from less than \$300 million in total value as recently as 2011.

Tract 1038 (Bricktown and Deep Deuce, \$629 million) is now home to the second highest total value of taxable property. Prior to the completion of Devon Tower, tract 1091 (Automobile Alley and downtown including the Cox Center, \$495 million) contained the greatest total amount of taxable property but now ranks third. All other tracts other than 1040 (south of I-40) in the study area are home to taxable property valued at \$100 million or more.

Smaller tracts with less than \$150 million in total value but with large percentage gains between 2009 and 2017 include 1018 (Mesta Park, 49% gain), 1026 (Department of Commerce, 138% gain), 1036.02 (Police Department and Municipal Courts, 104.2% gain), and 1037 (Union Station, 47% gain).

The smallest concentration of total property value is found in tract 1040 (\$25 million) located south of I-40 and stretching to the Oklahoma River. Much of the tract has been cleared for construction of the south section of Scissortail Park. Mostly small commercial structures are located within the tract, including about 100 housing units.

**New Downtown Square Footage.** Growth is also taking place in the amount of total square footage of taxable space in the downtown study area. Figure 40 details total assessed square footage between tax years 2009 and 2017. In 2017, properties with a total of 40.85 million square feet (sq. ft.) were located in the study area. More than 5.9 million total sq. ft. were added from 2009 to 2017 – a 17% gain.

Most of the gains in square footage are found in just six tracts. To the north, tract 1016 (far north) added 15.4% (+195,000 sq. ft.) to total taxable square footage. In the south, tract 1025 (St. Anthony Hospital, 58.6% gain, +1.0 million sq. ft.) and tract 1026 (Department of Commerce, 103% gain, +770,000 sq. ft.) posted gains of 50% or more in total square footage. Important but smaller gains among the southern tracts include tract 1030 (south OU Health Center, 29% gain, +636,000 sq. ft.), tract 1036.01 (Myriad Gardens and Civic Center, 38% gain, +2.5 million sq. ft.), and tract 1038 (Bricktown and Deep Deuce, 43% gain, +1.4 million sq. ft.). In tract 1036.01, Devon Tower comprises 1.8 million of the 2.5 million square feet of new footage reported and almost 20% of the 9.16 million total sq. ft. reported in the tract.

Six tracts in the study area reported flat or declining total taxable square footage between 2009 and 2017. The most significant declines are in tract 1037 (Union Station, -26%, -382,000 sq. ft.) and tract 1040 (south of I-40 to Oklahoma River, -11%, -50,000 sq. ft.). Both tracts are undergoing significant demolition and change in land use.

Smaller losses in square footage are reported in tract 1027 (north OU Health Center, -3%, -42,000 sq. ft.), tract 1091 (Automobile Alley to Cox Center, -4%, -300,000 sq. ft.), and tract 1036.02 (Police Department and Municipal Courts, -2%, -38,000 sq. ft.).

**Figure 40. Total Assessed Market Valuation by Census Tract - Downtown**

Census Tract	Tax Year						Share of Total Change	Percent Change 2009-2017
	2009	2011	2013	2015	2017	Change 2009-2017		
<b>1016</b>	\$69,800,185	\$73,943,446	\$77,284,122	\$87,012,169	\$112,607,147	\$42,806,962	2.3%	61.3%
<b>1017</b>	181,164,711	186,496,553	194,916,247	210,736,776	249,728,783	68,564,072	3.7%	37.8%
<b>1018</b>	94,415,128	92,355,082	95,718,631	109,516,910	140,486,484	46,071,356	2.5%	48.8%
<b>North Tracts</b>	345,380,024	352,795,081	367,919,000	407,265,855	502,822,414	157,442,390	8.4%	45.6%
<b>1025</b>	87,411,904	90,281,503	103,962,247	159,937,957	266,938,541	179,526,637	9.6%	205.4%
<b>1026</b>	58,725,902	60,922,959	85,285,682	54,088,634	139,964,407	81,238,505	4.3%	138.3%
<b>1027</b>	201,954,528	201,868,620	202,667,700	241,644,004	225,650,544	23,696,016	1.3%	11.7%
<b>1030</b>	155,971,704	166,129,072	224,686,830	114,831,721	184,154,662	28,182,958	1.5%	18.1%
<b>1091</b>	337,742,046	349,562,386	370,381,435	416,690,477	494,989,763	157,247,717	8.4%	46.6%
<b>1032</b>	143,494,124	143,969,107	156,907,093	176,306,598	232,899,789	89,405,665	4.8%	62.3%
<b>1036.01</b>	279,513,612	292,774,633	1,053,105,375	1,023,096,227	989,541,907	710,028,295	37.9%	254.0%
<b>1036.02</b>	54,259,180	56,255,936	66,241,914	75,639,583	110,775,685	56,516,505	3.0%	104.2%
<b>1037</b>	70,887,048	66,515,141	71,954,455	99,441,521	104,201,619	33,314,571	1.8%	47.0%
<b>1038</b>	279,552,781	292,614,252	400,142,602	536,440,891	628,646,884	349,094,103	18.6%	124.9%
<b>South Tracts</b>	1,669,512,829	1,720,893,609	2,735,335,333	2,898,117,613	3,377,763,801	1,708,250,972	91.2%	102.3%
<b>1040</b>	16,484,551	17,905,364	15,325,216	29,730,851	24,808,379	8,323,828	0.4%	50.5%
<b>All Tracts</b>	\$2,031,377,404	\$2,091,594,054	\$3,118,579,549	\$3,335,114,319	\$3,905,394,594	\$1,874,017,190	100.0%	92.3%

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

**Figure 41. Total Assessed Square Footage by Census Tract – Downtown**

Census Tract	Tax Year						Share of Total Change	Percent Change 2009-2017
	2009	2011	2013	2015	2017	Change 2009-2017		
<b>1016</b>	1,265,787	1,281,165	1,293,297	1,418,545	1,461,150	195,363	3.3%	15.4%
<b>1017</b>	1,697,625	1,697,891	1,704,106	1,715,250	1,705,060	7,435	0.1%	0.4%
<b>1018</b>	1,292,163	1,292,887	1,300,522	1,336,008	1,335,104	42,941	0.7%	3.3%
<b>North Tracts</b>	4,255,575	4,271,943	4,297,925	4,469,803	4,501,314	245,739	4.1%	5.8%
<b>1025</b>	1,788,163	1,843,007	1,720,138	2,127,662	2,835,962	1,047,799	17.7%	58.6%
<b>1026</b>	750,092	795,358	795,358	795,358	1,520,807	770,715	13.0%	102.7%
<b>1027</b>	1,361,376	1,362,240	1,362,240	1,362,240	1,319,184	-42,192	-0.7%	-3.1%
<b>1030</b>	2,201,477	2,188,458	1,898,309	2,297,962	2,837,335	635,858	10.7%	28.9%
<b>1091</b>	7,493,180	7,415,394	7,250,916	7,263,489	7,192,646	-300,534	-5.1%	-4.0%
<b>1032</b>	3,321,849	3,326,825	3,458,496	3,497,523	3,477,720	155,871	2.6%	4.7%
<b>1036.01</b>	6,653,361	6,903,388	9,277,596	9,296,252	9,162,214	2,508,853	42.3%	37.7%
<b>1036.02</b>	1,964,866	1,957,857	1,987,724	2,015,088	1,927,322	-37,544	-0.6%	-1.9%
<b>1037</b>	1,499,367	1,496,091	1,410,760	1,363,527	1,117,573	-381,794	-6.4%	-25.5%
<b>1038</b>	3,196,761	3,262,791	3,440,509	4,151,684	4,576,206	1,379,445	23.3%	43.2%
<b>South Tracts</b>	30,230,492	30,551,409	32,602,046	34,170,785	35,966,969	5,736,477	96.7%	19.0%
<b>1040</b>	435,388	435,388	429,338	396,592	385,747	-49,641	-0.8%	-11.4%
<b>All Tracts</b>	34,921,455	35,258,740	37,329,309	39,037,180	40,854,030	5,932,575	100.0%	17.0%

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

## Downtown Office Market

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

**Office Property Valuation Changes.** Figure 41 summarizes the change in office market valuations and square footage in the study area in two-year intervals in the 2009 to 2017 period. The downtown office market posted substantial growth between 2009 and 2017. Total market value of all office properties in the study area more than doubled (130% gain) from \$487 million in 2009 to \$1.1 billion in 2017.

The 130% gain in office valuation exceeds the 92% 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% of total valuation in 2009 to 28.7% in 2017.

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

**Office Gains Outpace Non-Office.** The \$634 million rise in office valuations comprises a large share of the total gain in value across all property types between 2009 and 2017. Rising office values account for about one-third (33.8%) of the total \$1.87 billion increase across all property types. For comparison, non-office property increased by a combined \$1.24 billion in the period. Despite a larger share of the total gain, non-office properties experienced a smaller percentage gain of 80% across the period.

**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 sq. ft.).

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

Total office space in tax year 2017 does not yet include the newly constructed BOK Park Plaza. It is the first speculative office building constructed in downtown since the oil-Boom era Leadership Square was completed in 1984. At an estimated cost of \$270 million, the new downtown offices of BOK in Oklahoma City are slated to be added to the tax rolls in tax year 2018.<sup>47</sup> The 27-story building has approximately 690,000 square feet of space across 25 floors including class-A office space, retail, dining, and fitness facilities. The building is located directly along the streetcar line in the business district and is the sixth tallest building downtown.<sup>48</sup> Its introduction will add an estimated 25% to total office property



valuations downtown along with an approximately 5% increase in the 14.6 million square feet of taxable office space already in the study area.

**Downtown Office Space by Tract.** Figure 42 illustrates the distribution of taxable office space by square footage and market value across the Census tracts in the downtown study area in 2017. More than two-thirds (68%) of total office square footage in the study area is in just two tracts – 1091 (Automobile Alley to Cox Center, 4.2 million sq. ft.) and 1036.01 (downtown including Myriad Gardens, 5.7 million sq. ft.).

Four other tracts have slightly less than 1 million square feet of office space each – tract 1032 (National Memorial and County Jail, 823,000 sq. ft.), tract 1030 (south OU Health Center, 770,000 sq. ft.), tract 1025 (St. Anthony Hospital, 710,000 sq. ft.), and tract 1038 (Bricktown and Deep Deuce, 780,000 sq. ft.). All other tracts have less than 500,000 square feet of office space.

Valuations are more highly concentrated than square footage, with more than half the total value of office space (59%) now reported in tract 1036.01 in the business district where Devon Tower is located. Tract 1091 (Automobile Alley to Cox Center) is home to 29% of total square footage but represents only 16% of total office space valuation. Tracts 1036.01 and 1091 account for a combined 74% of total office valuation in the study area.

Relatively little office space is in tract 1018 to the north (Mesta Park, 66,000 sq. ft.). Similarly, southern tract 1037 (Union Station, 55,000 sq. ft.) and tract 1040 (south of I-40 to Oklahoma River, 16,000 sq. ft.) have little existing office space.

Office valuations per square foot are highest in three southern tracts – tract 1026 (Department of Commerce, \$112), tract 1036.01 (downtown including Myriad Gardens, \$115), and tract 1038 (Bricktown and Deep Deuce, \$101).

Relatively low office space valuations under \$40 per square foot are found in residential tracts 1017 (\$33, Heritage Hills) and 1018 (\$37, Mesta Park) to the north; southern tracts 1027 (north OU Health Center, \$37) and 1030 (south OU Health Center, \$22); and tract 1040 south of I-40 to the Oklahoma River (\$14).

<b>Figure 42. Downtown Office Market Footage and Valuation</b>								
<b>Tax Year</b>	<b>Value</b>		<b>Square Footage</b>		<b>Office Share of Total</b>		<b>Value per Square Foot</b>	
	<b>All Types</b>	<b>Office</b>	<b>All Types</b>	<b>Office</b>	<b>Value</b>	<b>Footage</b>	<b>Total</b>	<b>Office</b>
<b>2009</b>	\$2,031,377,404	\$487,085,895	34,921,455	12,948,383	24.0%	37.1%	\$58.17	\$37.62
<b>2011</b>	2,091,594,054	505,229,560	35,258,740	12,717,843	24.2%	36.1%	59.32	39.73
<b>2013</b>	3,118,579,549	1,099,102,133	37,329,309	14,155,322	35.2%	37.9%	83.54	77.65
<b>2015</b>	3,335,114,319	982,027,621	39,037,180	14,290,552	29.4%	36.6%	85.43	68.72
<b>2017</b>	3,905,394,594	1,121,128,450	40,854,030	14,589,167	28.7%	35.7%	95.59	76.85

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

<b>Figure 43. Downtown Office Market Footage and Valuation (Tax Year 2017)</b>								
<b>Census Tract</b>	<b>Value</b>		<b>Square Footage</b>		<b>Office Share of Total</b>		<b>Value per Square Foot</b>	
	<b>All Types</b>	<b>Office</b>	<b>All Types</b>	<b>Office</b>	<b>Value</b>	<b>Footage</b>	<b>Total</b>	<b>Office</b>
<b>1016</b>	112,607,147	14,739,020	1,461,150	204,384	13.1%	14.0%	77.07	72.11
<b>1017</b>	249,728,783	7,540,919	1,705,060	228,885	3.0%	13.4%	146.46	32.95
<b>1018</b>	140,486,484	2,475,687	1,335,104	66,043	1.8%	4.9%	105.23	37.49
<b>North Tracts</b>	\$502,822,414	\$24,755,625	4,501,314	499,312	4.9%	11.1%	\$111.71	\$49.58
<b>1025</b>	266,938,541	48,114,211	2,835,962	709,655	18.0%	25.0%	94.13	67.80
<b>1026</b>	139,964,407	51,404,733	1,520,807	457,074	36.7%	30.1%	92.03	112.46
<b>1027</b>	225,650,544	14,588,408	1,319,184	392,673	6.5%	29.8%	171.05	37.15
<b>1030</b>	184,154,662	16,802,449	2,837,335	769,751	9.1%	27.1%	64.90	21.83
<b>1091</b>	494,989,763	175,767,777	7,192,646	4,172,204	35.5%	58.0%	68.82	42.13
<b>1032</b>	232,899,789	35,595,753	3,477,720	823,149	15.3%	23.7%	66.97	43.24
<b>1036.01</b>	989,541,907	658,294,006	9,162,214	5,722,256	66.5%	62.5%	108.00	115.04
<b>1036.02</b>	110,775,685	13,594,284	1,927,322	193,723	12.3%	10.1%	57.48	70.17
<b>1037</b>	104,201,619	3,698,428	1,117,573	54,752	3.5%	4.9%	93.24	67.55
<b>1038</b>	628,646,884	78,293,326	4,576,206	779,011	12.5%	17.0%	137.37	100.50
<b>South Tracts</b>	\$3,377,763,801	\$1,096,153,375	35,966,969	14,074,248	32.5%	39.1%	\$93.91	\$77.88
<b>1040</b>	24,808,379	219,450	385,747	15,607	0.9%	4.0%	64.31	14.06
<b>Total</b>	\$3,905,394,594	\$1,121,128,450	40,854,030	14,589,167	28.7%	35.7%	\$95.59	\$76.85

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

## Downtown Residential Market

Recent growth in the number of residential units in the study area was described in an earlier section of the report (see Figure 15). Approximately 2,700 housing units (55.3% gain) were added in the study area between tax years 2009 and 2017, reaching a total of 7,635 units.

**Residential Property Valuation Changes.** Figure 43 summarizes changes in housing market valuations in the study area at two-year intervals in the 2009 to 2017 period. Properties include single- and multi-family as well as owner- and renter-occupied properties.

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% gain) from \$395 million in 2009. Residential property now comprises 20.9% of the \$3.91 billion in total property valuation across all property types. The share of total valuation traced to residential property increased slightly from 19.4% in 2009 to 20.9% in 2017.

Gains in the study area are even larger measured by square footage, rising from 17.5% of total taxable space in the study area in 2009 to 20.0% in 2017 (see Figure 44).

Nearly 2.9 million square feet of residential space was added between 2009 and 2017 – a 47% 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 development in the area from a reported \$64 in 2009 to \$91 in 2017, a 41% increase. This trails the overall 64% gain in value per square foot across all property types in the period.

The highest residential valuations per square foot are found in tract 1017 (Heritage Hills, \$127) and tract 1091 (Automobile Alley to Cox Center, \$121). These two tracts are not the leaders in new housing unit construction but instead reflect renovations of existing units and broadly rising property values.

The leading tracts by number of new units added - tracts 1025 (St. Anthony Hospital) and tract 1038 (Bricktown and Deep Deuce) reflect differing price behavior. Tract 1025 continues to have a relatively low value per square foot at \$71 in 2017. Conversely, the average value per square foot of residential property in Bricktown and Deep Deuce (tract 1038) reached \$107 in 2017.

Based on assessment data, very little residential property by either unit count or value is located in four of the 14 study area tracts – 1027 (north OU Health Center, 5 units), 1036.02 (Police Department and Municipal Court, 31 units), 1037 (Union Station, 33 units), and 1040 (south of I-40 to Oklahoma River, 89 units). Value per square foot for residential property in each of these tracts falls below \$30, with an average of about \$20 across the four tracts.

Figure 44. Downtown Residential Market Footage and Valuation									
Tax Year	Residential Units	Value		Square Footage		Residential Share of Total		Value per Square Foot	
		All Types	Residential	All Types	Residential	Value	Footage	Total	Residential
2009	4,916	\$2,031,377,404	\$395,081,138	34,921,455	6,125,970	19.4%	17.5%	\$58.17	\$64.49
2011	4,995	2,091,594,054	419,255,214	35,258,740	6,282,165	20.0%	17.8%	59.32	66.74
2013	5,182	3,118,579,549	480,618,210	37,329,309	6,547,499	15.4%	17.5%	83.54	73.40
2015	5,702	3,335,114,319	615,380,680	39,037,180	7,237,086	18.5%	18.5%	85.43	85.03
2017	7,635	3,905,394,594	814,946,129	40,854,030	8,982,798	20.9%	22.0%	95.59	90.72

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

Figure 45. Downtown Residential Market Footage and Valuation (Tax Year 2017)									
Census Tract	Residential Units	Value		Square Footage		Residential Share of Total		Value per Square Foot	
		All Types	Residential	All Types	Residential	Value	Footage	Total	Residential
1016	375	112,607,147	21,963,536	1,461,150	429,985	19.5%	29.4%	77.07	51.08
1017	529	249,728,783	176,469,268	1,705,060	1,389,221	70.7%	81.5%	146.46	127.03
1018	791	140,486,484	97,998,362	1,335,104	1,185,607	69.8%	88.8%	105.23	82.66
North Tracts	1,695	\$502,822,414	\$296,431,167	4,501,314	3,004,813	59.0%	66.8%	111.71	\$98.65
1025	1,398	266,938,541	83,006,661	2,835,962	1,162,138	31.1%	41.0%	94.13	71.43
1026	474	139,964,407	31,529,630	1,520,807	503,114	22.5%	33.1%	92.03	62.67
1027	5	225,650,544	205,993	1,319,184	8,666	0.1%	0.7%	171.05	23.77
1030	854	184,154,662	88,960,407	2,837,335	947,264	48.3%	33.4%	64.90	93.91
1091	217	494,989,763	15,932,010	7,192,646	131,398	3.2%	1.8%	68.82	121.25
1032	1,137	232,899,789	100,518,260	3,477,720	1,203,478	43.2%	34.6%	66.97	83.52
1036.01	280	989,541,907	34,772,862	9,162,214	370,225	3.5%	4.0%	108.00	93.92
1036.02	31	110,775,685	684,915	1,927,322	35,806	0.6%	1.9%	57.48	19.13
1037	33	104,201,619	224,810	1,117,573	32,596	0.2%	2.9%	93.24	6.90
1038	1,422	628,646,884	160,197,891	4,576,206	1,496,441	25.5%	32.7%	137.37	107.05
South Tracts	5,851	\$3,377,763,801	\$516,033,440	35,966,969	5,891,126	15.3%	16.4%	93.91	\$87.60
1040	89	24,808,379	2,481,523	385,747	86,859	10.0%	22.5%	64.31	28.57
Total	7,635	\$3,905,394,594	\$814,946,129	\$40,854,030	\$8,982,798	20.9%	22.0%	95.59	\$90.72

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

## 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 section reviews the resulting changes in property valuations in Bricktown in the MAPS era as existing properties were redeveloped and new structures built. The 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.

Historical valuations for the 23 properties are detailed in Figure 45. 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.<sup>49</sup>

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 gain represents 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% 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% 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% using the time-consistent series. A similar gain of 46% was realized in the 2013 to 2017 period.

**Figure 46. Market Value of Selected Bricktown Commercial Properties**

Property Description	Property Address	Taxable Market Value by Tax Year					Change in market value 2009-2017	Percent Change in Value			
		2000	2005	2009	2013	2017		2000-2017	2009-2017	2009-2013	2013-2017
Zio's	12 E. California	\$322,150	\$1,317,201	\$1,317,201	\$2,574,001	\$2,574,001	\$1,256,800	699.0%	95.4%	95.4%	0.0%
Chileno's Mexican Restaurant	15 E. California	259,700	1,040,000	1,040,000	1,527,000	1,527,000	487,000	488.0%	46.8%	46.8%	0.0%
Oklahoma Hardware, West Part	19 E. California	540,250	790,100	790,100	1,807,300	1,807,300	1,017,200	234.5%	128.7%	128.7%	0.0%
Univ. of Central Oklahoma	29 E. California	623,800	2,960,000	2,960,000	Exempt	Exempt	NA	NA	NA	NA	NA
Kingman Building	100 E. California	1,300,000	2,622,720	2,244,720	2,244,720	6,789,664	4,544,944	422.3%	202.5%	0.0%	202.5%
Jim Brewer Building	101 E. California	158,450	1,323,400	1,323,400	1,323,400	1,872,000	548,600	1081.4%	41.5%	0.0%	41.5%
Dungeon	105 E. California	299,700	1,323,400	1,323,400	Combined	Combined	NA	NA	NA	NA	NA
Unoccupied	108 E. California	129,950	1,600,000	2,000,000	1,500,000	2,156,805	156,805	1559.7%	7.8%	-25.0%	43.8%
Miller Jackson East	111 E. California	189,100	1,579,000	1,579,000	3,240,001	3,240,001	1,661,001	1613.4%	105.2%	105.2%	0.0%
Miller Jackson West	115 E. California	188,450	1,380,000	1,380,000	857,500	3,238,800	1,858,800	1618.7%	134.7%	-37.9%	277.7%
Brickopolis Mini Golf	116 E. California	68,250	1,255,000	730,000	857,500	1,838,477	1,108,477	2593.7%	151.8%	17.5%	114.4%
Chevy Bricktown Event Center	413 E. California	229,300	2,658,092	2,658,092	2,809,600	5,357,200	2,699,108	2236.3%	101.5%	5.7%	90.7%
Public Strategies	3 E. Main	335,950	1,095,867	1,192,331	2,666,250	2,666,250	1,473,919	693.6%	123.6%	123.6%	0.0%
Mideke Building	100 E. Main	399,150	2,280,905	2,786,840	3,969,900	14,863,000	12,076,160	3623.7%	433.3%	42.5%	274.4%
Candy Factory Lofts/Tenants	1 E. Sheridan	391,110	1,621,846	2,209,800	6,615,510	6,615,510	4,405,710	1591.5%	199.4%	199.4%	0.0%
Melting Pot/Multiple Tenants	4 E. Sheridan	1,116,100	1,116,146	1,742,000	3,599,800	4,880,587	3,138,587	337.3%	180.2%	106.6%	35.6%
Abuelo's	17 E. Sheridan	559,000	1,518,843	2,322,000	2,215,080	2,215,080	-106,920	296.3%	-4.6%	-4.6%	0.0%
Henry Hudson	27 E. Sheridan	531,550	1,216,405	2,136,750	1,309,000	2,841,720	704,970	434.6%	33.0%	-38.7%	117.1%
Bricktown Brewery	29 E. Sheridan	426,300	696,941	1,072,350	1,309,000	2,106,690	1,034,340	394.2%	96.5%	22.1%	60.9%
Spaghetti Warehouse	101 E. Sheridan	769,300	2,167,056	2,167,056	3,500,000	3,500,000	1,332,944	355.0%	61.5%	61.5%	0.0%
Breeden Bldg	120 E. Sheridan	1,055,650	2,956,000	3,208,676	5,365,626	3,600,000	391,324	241.0%	12.2%	67.2%	-32.9%
Tapwerks Alehouse & Cafe	121 E. Sheridan	540,000	635,318	635,318	1,319,220	1,608,030	972,712	197.8%	153.1%	107.6%	21.9%
West Restaurant/Painted Door Gift	124 E. Sheridan	328,850	1,120,000	1,805,062	3,542,700	3,542,700	1,737,638	977.3%	96.3%	96.3%	0.0%
<b>Total properties (23 properties)</b>		<b>\$10,762,060</b>	<b>\$36,274,240</b>	<b>\$40,624,096</b>	<b>\$54,153,108</b>	<b>\$78,840,815</b>	<b>\$38,216,719</b>	<b>632.6%</b>	<b>94.1%</b>	<b>33.3%</b>	<b>45.6%</b>
<b>Total -Time Consistent Series (22 properties ex. Exempt)</b>		<b>\$10,138,260</b>	<b>\$33,314,240</b>	<b>\$37,664,096</b>	<b>\$54,153,108</b>	<b>\$78,840,815</b>	<b>\$42,500,119</b>	<b>677.7%</b>	<b>109.3%</b>	<b>43.8%</b>	<b>45.6%</b>

Source: Oklahoma County Assessor - special tabulations and county property search web site at <https://assessor.oklahomacounty.org>.

Notes: The time consistent series adjusts for exempt and combined properties to create a consistent comparative measure of total property value over time using 2017 as a base year. Properties labeled as combined are captured as a component of another listed property. Properties labeled as exempt were purchased by a tax-exempt entity and are no longer on the tax rolls.



## VII. Lodging, Tourism, and Cultural Attractions

The MAPS projects carried significant expectations for increased visitation 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 downtown. This section of the report examines the emergence of the downtown hotel sector in the MAPS era along with changes in downtown tourism activity.

### Downtown/Bricktown Lodging Sector

A key aspect of the strategy underlying MAPS was the development of a significant hotel sector in downtown to accommodate visitors to newly completed MAPS projects and the revitalized downtown area. A related goal was the establishment of a room base to support far larger conventions than attracted in the past.

**Pre-MAPS Lodging.** Prior to the approval of the initial MAPS projects, few hotel options were available in the downtown business district. 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 downtown lodging options, few entertainment, food service, and recreational offerings were available to serve visitors to the area.

No lodging options were available in Bricktown in the pre-MAPS era. The former industrial and warehousing district was highly distressed and dotted with numerous empty parcels, the result of urban renewal in prior decades. Just prior to MAPS, the Bricktown area was home to mostly light commercial activity that survived the city's industrial and manufacturing decline. Many buildings were in disrepair and the area was underutilized relative to land adjacent to the city center in most cities of similar size.

**Post-MAPS Lodging to 2009.** Beginning with the opening of the MAPS-funded ballpark in 1998 and the canal in 1999, hotel development in downtown and Bricktown entered an extended period of growth. Figure 46 provides a timeline of hotel development and room count in the area since 1976 along with the location of each facility. In early 2000, nearly 25 years after the opening of the Sheraton, the 311-room Renaissance-Oklahoma City Hotel launched the rebirth of the lodging sector in downtown. Developer John Q. Hammons noted the vital role played by MAPS in his firm's decision to build the new Renaissance Hotel in downtown Oklahoma City:

*"When Oklahoma City passed the Metropolitan Area Projects plan in the early 1990s, it made a great commitment to strengthening its offering to the convention and tourism industry. I recognized the commitment made by the people of Oklahoma City and am excited to be a part of their vision for the city's future."*<sup>50</sup>

Located adjacent to the Cox Convention Center, the Renaissance served as a second conference-capable hotel. More importantly, the addition of the Renaissance allowed Oklahoma City to move into a higher tier of conference destination cities.<sup>51</sup>

**Figure 47. 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.

The 225-room Courtyard Hotel subsequently opened in the business district in 2004 followed by the 108-room luxury Colcord Hotel in 2006.

The transition of hotel development to Bricktown in 2007 marked an important step traced to the MAPS projects. No Bricktown lodging options were available to visitors until the opening of the 151-room Residence Inn in 2007.

The restoration and reopening of the Skirvin Hotel in 2007 marked another important milestone in the transformation of downtown lodging. After purchasing the hotel in 2002, the city reached agreement with a private developer to restore the historic hotel property. City efforts to restore the abandoned hotel to service culminated in a 2007 reopening by the Hilton chain after sitting abandoned for nearly 20 years. The \$55 million renovation of the Skirvin added 225 luxury rooms to the central business district.

More hotel development was completed in Bricktown in 2009 with the addition of a 200-room Hampton Inn, bringing the total number of rooms in Bricktown to 351.

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 combined business district and Bricktown area tripled relative to pre-MAPS levels. Most of the development in the period was in the business district where 869 of the 1,220 new rooms were located.

**Post-MAPS Lodging after 2014.** 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. Development has continued unabated through 2018.

In 2014, three hotels opened in Bricktown (Hilton Garden Inn, Homewood Suites, and aloft Hotel) and one in the business district (Ambassador Hotel).<sup>52</sup> In 2015, new hotels opened in both the business district (Embassy Suites) and Bricktown (Holiday Inn Express and Suites).

The 21c Hotel and Museum opened west of the business district in 2016 followed by two Bricktown hotels in 2017 (Springhill Suites and AC Hotels). Three additional Bricktown hotels opened in 2018 (Hyatt Place, Candlewood Suites, and Staybridge Suites).

Since early 2014, twelve 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.

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).

**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.<sup>53</sup> 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 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 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.<sup>54</sup> Given other planned hotel development downtown, the city will undoubtedly meet this long-run 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 47 summarizes visitation and visitation numbers at several key attractions in the downtown study area. Estimates suggest that 10-12 million visitors attend and participate in a range of events and attractions in the study area each year.

**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 annually 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 annually 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. The library has attracted approximately 300,000 in-person visitors annually the past decade. Unlike most branch locations, home-address analysis finds that visitors to the downtown library are distributed widely across the city rather than living primarily near downtown. In-person visits to the library have remained relatively steady despite the ongoing shift in circulation numbers toward digital versions of books. The physical presence of the downtown library also fills numerous support needs of the broader city library system including administrative, finance, operations, and human resource functions. The downtown library houses special collections including the Genealogy Collection, Holocaust Collection, and Oklahoma Collection. Numerous reference items including historical documents, microform collections, and government publications are similarly available for reference use only within the downtown library. The downtown library location has low-cost meeting rooms and classrooms available to the public, with 1,132 room reservations made in fiscal year 2018.

**Figure 48. Visitation/Participation in Downtown/Bricktown Area**

Site	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>MAPS-Related:</b>															
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
<b>Oklahoma River:</b>															
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
<b>Oklahoma City National Memorial:</b>															
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
<b>Myriad Botanical Gardens:</b>															
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]									
<b>Downtown Special Events:</b>															
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
<b>Area Total</b>	<b>6,474,096</b>	<b>6,416,184</b>	<b>7,442,363</b>	<b>8,030,817</b>	<b>7,672,193</b>	<b>8,765,011</b>	<b>8,843,219</b>	<b>9,520,159</b>	<b>11,179,012</b>	<b>12,334,076</b>	<b>12,391,236</b>	<b>12,082,144</b>	<b>11,649,954</b>	<b>11,047,908</b>	<b>11,232,947</b>

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.

## VIII. 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 and significant sign of changing transportation downtown is the new MAPS 3-funded streetcar system. The streetcar opened in December 2018 and will provide 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 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 available at Santa Fe Station.

### Multimodal Transportation

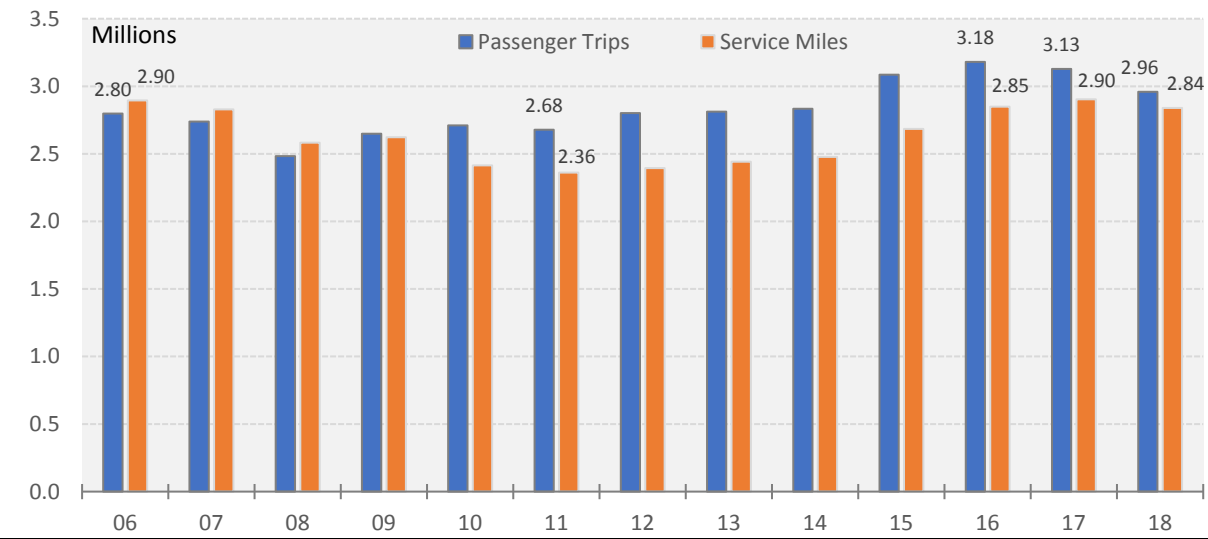
**Comprehensive Transportation Plan.** The city continues work toward the development of a comprehensive intermodal transportation system in the downtown area. Beginning with the 2030 Fixed Guideway Plan (FGP), the city has pursued efforts to improve citywide transportation including bus enhancements, bus rapid transit, rail-based transportation, and a downtown streetcar system.<sup>55</sup>

A key tenet of the city's ongoing comprehensive plan is to develop a transportation system that works for everyone. The plan recognizes that autos will likely remain the primary mode of transportation for many years but that improving the condition, function, and connectivity of the existing street network is a top priority.<sup>56</sup> Other priorities include efforts to improve system capacity, land use efficiency, air quality, urban quality, and public health. A digital version of the city's comprehensive development plan is available online.<sup>57</sup>

**Bus Service.** EMBARK bus service will remain one of the key modes of transportation relied upon to accommodate future population growth and transportation needs in Oklahoma City. Embark bus service currently provides approximately 20 routes that link the downtown transit center to major destinations citywide.<sup>58</sup> A circulator bus route also operates between Bricktown and the downtown transit center.

The bus system provided approximately 3 million passenger trips in fiscal year 2018 and averaged 2.84 million service miles driven each month (see Figure 48)<sup>59</sup> The number of passenger trips by bus entered an extended upturn beginning around 2011. Although down slightly in fiscal years 2016 and 2017, passenger trips remain more than 10% above 2011 levels.

In late 2018, Oklahoma City was awarded a \$14.3 million federal grant to develop a bus rapid transit (BRT) corridor extending from downtown to Meridian and along Northwest Expressway.<sup>60</sup> BRT vehicles receive priority over other vehicles in traffic flow, typically through either traffic signaling or dedicated lanes. A recent cost-benefit study<sup>61</sup> of a potential BRT line to the northwest highlighted the large number of downtown area workers who live within a short distance of the planned corridor. The new BRT line will connect to the MAPS streetcar line downtown when it comes online in 2023.

**Figure 49. Embark Bus Service – Trips and Service Miles**

Source: City of Oklahoma City Performance Data at <https://app.okc.gov/applications/lfrforcitizens/Forms/LFRMetrics>

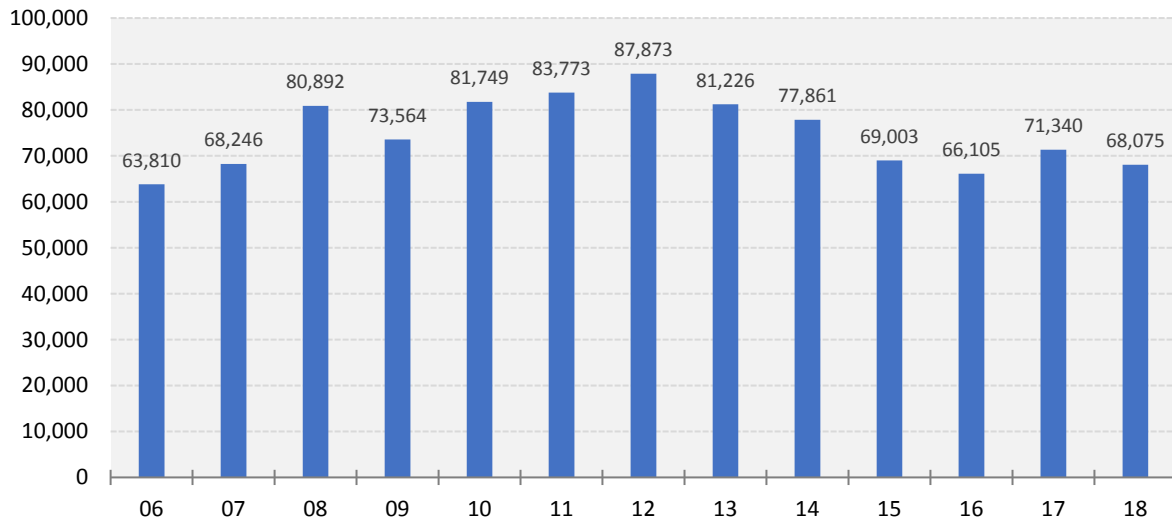
**Amtrak Passenger Rail - Santa Fe Station.** Multiple forms of transportation are anchored at historic Santa Fe Station in downtown. The station is uniquely positioned between Bricktown and the business district and is a key part of the city's forward-looking multimodal transit plan. The intermodal station provides access to direct rail which is enhanced by its connection to the MAPS 3 streetcar, EMBARK buses, and a Spokies bike sharing station.

The purchase of the depot by the city in 2014 and subsequent restoration for use as the central downtown transit hub is the result of partnerships among Association of Central Oklahoma Governments (ACOG), Oklahoma Department of Transportation, and City of Oklahoma City. The city provided \$11.33 million to the project from MAPS 3 and Project 180 funding streams.<sup>62</sup> The federal Transportation Investment Generating Economic Recovery (TIGER) program provided \$13.6 million, ACOG contributed \$2 million, and the state added \$1.5 million.

The newly renovated station also serves as the north terminus for Amtrak's Heartland Flyer route which has been in service since 1999. The route runs between Oklahoma City and Ft. Worth with stops in Norman, Purcell, Pauls Valley, Ardmore, and Gainesville, Texas. The service is provided under an agreement between Amtrak and the states of Oklahoma and Texas. The train has served an average of 75,000 passengers annually since fiscal year 2006. Ridership peaked at almost 88,000 in fiscal year 2012 but totaled only 68,075 in fiscal year 2018 (see Figure 49). Low gasoline prices and the state-level recession in 2015 and 2016 are believed to have weighed heavily on ridership numbers in recent years.

Efforts continue to bring expanded intercity and long-distance passenger rail options to Oklahoma.<sup>63</sup> In 2016, Amtrak instituted a throughway bus route from Oklahoma City to Newton, Kansas providing a connection from the Heartland Flyer to Amtrak's Southwest Chief operating between Chicago and Los Angeles. Longer-term, the station has the capacity to expand and serve as the terminal for possible future high-speed trains and regional light rail service. In terms of potential future passenger rail service, Oklahoma is located on the federally designated high-speed rail corridor known as the South Central Corridor stretching from Fort Worth to Oklahoma City to Tulsa.



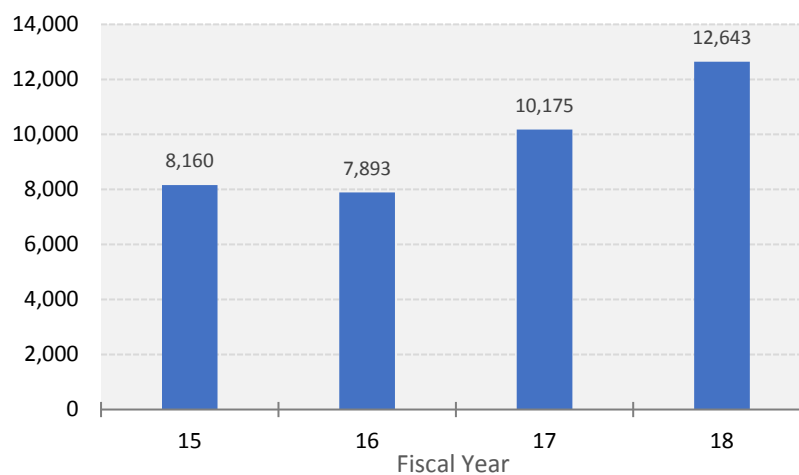
**Figure 50. Heartland Flyer – Annual Passengers**

Source: City of Oklahoma City Performance Data at <https://app.okc.gov/applications/lfrforcitizens/Forms/LFRMetrics>

Notes: Annual passenger counts are based on Amtrak's fiscal year ended September 30.

**Bicycle Sharing.** Spokies is the only bike sharing program in Oklahoma City.<sup>64</sup> Approximately 50 bikes are located at eight stations across downtown Oklahoma City. The purpose of the Spokies Bike Share Program is to provide an alternate transit option for residents and visitors that provide health benefits and contribute to a cleaner environment.

Bicycles are viewed as an important component of the city's multimodal transit system. The sharing system is operated by EMBARK, serviced by Bicycle Transit Services, with bikes and stations provided by BCycle, a unit of Trek Bicycles of Wisconsin. Oklahoma City is one of more than 40 systems launched and operated by the same companies in metropolitan areas around the country. Spokies ridership continues to rise (see Figure 50). After averaging approximately 8,000 riders in 2015 and 2016, ridership increased 29% in 2017 to 10,175 trips and by 24% in 2018 to 12,643 rides.

**Figure 51. Spokies Bike Sharing – Annual Trips**

Source: City of Oklahoma City Performance Data at <https://app.okc.gov/applications/lfrforcitizens/Forms/LFRMetrics>

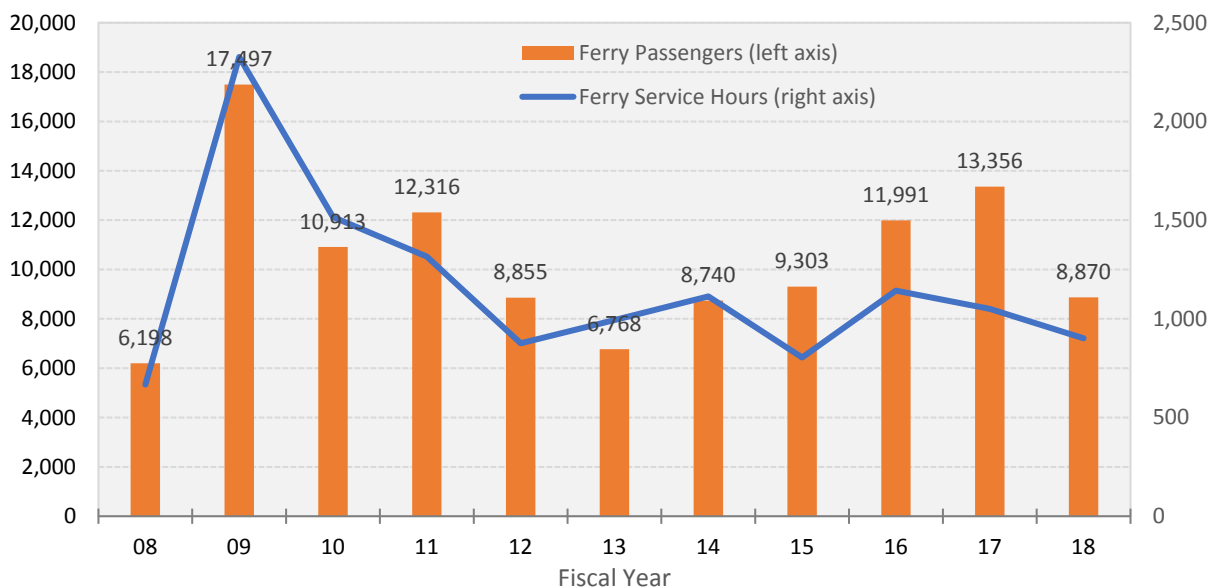
**Scooters.** Other nontraditional forms of downtown transportation continue to develop as well. This includes the relatively recent introduction of electric scooters to downtown. A private firm provides scooter access in the downtown area – Lime (250 scooters).<sup>65</sup> The dockless (pick-up and drop anywhere) model allows for convenient single passenger last-mile transportation in the downtown area.

Following passage of a recent ordinance, operators now pay the city \$302 for a license to operate in the city plus an annual operating fee of \$30 per scooter.<sup>66</sup> Scooter firms must also provide the city with monthly reports on usage, accidents, vandalism, and complaints. Fleets of up to 250 scooters are allowed with a possible 100 additional scooters if usage benchmarks are met.<sup>67</sup>

**Oklahoma River Cruises.** Transportation by water is also available through ferry cruises along the MAPS-funded Oklahoma River. Operated by EMBARK, river transit provides access to Historic Stockyards City, the Meridian Corridor, and the growing Regatta Park/Boathouse District. All four available landings have parking and access to additional public transit services.

Specialty and charter cruises are available upon request throughout the year, along with catering options. River cruise passenger counts averaged approximately 10,400 annually since 2008 (see Figure 51). Year-to-year passenger counts are highly volatile and influenced by the hours of service provided. The historical peak in passengers was set most recently in 2017 with 13,356 passengers. Passenger counts have averaged approximately 10,900 in the four most recent fiscal years. The ferries operate approximately 1,000 hours each year and carry about 10 passengers per ferry.

**Figure 52. Oklahoma River Cruises – Annual Passengers & Service Hours**



Source: City of Oklahoma City Performance Data at <https://app.okc.gov/applications/lfrforcitizens/Forms/LFRMetrics>

## EMBARK 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 streetcar system is fully funded by MAPS 3 sales tax receipts. The 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 downtown transportation plan.

The streetcar's path is closely aligned with existing and emerging economic development corridors downtown and designed to make all areas of downtown readily accessible to workers, residents, and visitors. The line is centered around the 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.

**Interconnected City.** The streetcar system will be interconnected with all other forms of transportation and provide convenient transfer access to other transportation options downtown. Immediately adjacent to the streetcar line are the EMBARK Transit Center, Santa Fe Intermodal Transit Hub, multiple public parking structures, and several Spokies stations. The initial path is also designed for future expansion to serve other nearby areas and connect with other forms of interregional transportation.

The addition of the streetcar is a response to anticipated growth in future transportation needs. The number of downtown residents and visitors to the area is expected to rise steadily over time as additional housing is built downtown, downtown employment expands, and visitor attractions mature. This growth is expected to produce increased demand for local transportation downtown. A shift is also anticipated in the method of commuting to work away from traditional automobiles as the urban character of downtown develops. The connection of other forms of transportation to the streetcar line is expected to provide additional future demand.

The streetcar system will provide a direct connection between major employers, government offices, lodging and food service, visitor attractions, entertainment venues, cultural sites, conference centers, and residences in the downtown area. Several critical service providers are situated along the streetcar line including St. Anthony's Hospital and the new downtown elementary school. Many of the largest and most frequently visited entertainment venues in the state are located along the streetcar path in and around downtown OKC. The streetcar places all downtown public parking structures within a short ride of most downtown destinations.

From the perspective of MAPS, the streetcar serves as a connector system to provide access to all major MAPS-related projects downtown. Nearly all downtown MAPS destinations will be located either immediately adjacent to or within one block of the streetcar path including the Bricktown Ballpark, Bricktown Canal, Downtown Library, Cox Convention Center, Chesapeake Energy Arena, Scissortail Park, and the Civic Center. The new convention center and Omni convention hotel will also be located adjacent to the streetcar path. The Oklahoma River will be accessible for pedestrians from the Streetcar station at the north end of Scissortail Park.

**Streetcar System Design.** The streetcar system infrastructure consists of 4.9 miles of track, 22 boarding platforms, 7 cars that hold 100 passengers each, and a maintenance and storage facility. A map of the two streetcar lines and each station is shown in Figure 52.

Figure 53. Downtown Streetcar Map



Source: Embark

The D Line (Downtown) is a 4.6-mile main-loop running mostly north-south and centered around the business district. Tracks run north through Automobile Alley to Midtown and south to Scissortail Park with a loop through Bricktown. The B Line (Bricktown) is a 2-mile overlay loop running east-west that provides service between Bricktown, Chesapeake Energy Arena, Scissortail Park, and the new downtown Convention Center. The D Line provides daily service while the B Line provides weekend and special event service to the entertainment areas south of the central business district.

The streetcar design employs an innovative hybrid-electric power system using overhead electric lines and onboard battery storage on portions of the route for better visibility and improved aesthetics. Cars are equipped with noise dampening features and run flush to street level, providing curb-level boarding for all passengers.

### Changing Downtown Commuting Patterns

Changes in the commuting patterns of workers are underway in most cities, including residents in the downtown study. Figure 53 details the method of transportation to work for downtown residents living in the study area Census tracts in both 2010 and 2017. The commuting pattern is steadily 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% in 2010 to 81.7% 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 working residents (10% of the total) in the downtown study area now report walking as their primary form of commuting to work, a more than 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.

<b>Figure 54. Means of Transportation to Work - Study Area Census Tracts</b>						
<b>Mode of Transportation</b>	<b>2010</b>		<b>2017</b>		<b>2010-17</b>	
	<b>Total</b>	<b>Share</b>	<b>Total</b>	<b>Share</b>	<b>Change</b>	<b>Percent Change</b>
Car, truck, or van	3,215	83.8%	4,056	81.7%	841	26.2%
Public transportation (excluding taxicab)	114	3.0%	76	1.5%	-38	-33.3%
Bicycle	74	1.9%	83	1.7%	9	12.2%
Walked	187	4.9%	478	9.6%	291	155.6%
Taxicab, motorcycle, or other means	98	2.6%	49	1.0%	-49	-50.0%
Worked at home	158	4.1%	221	4.5%	63	39.9%
<b>Total</b>	<b>3,837</b>	<b>100.0%</b>	<b>4,963</b>	<b>100.0%</b>	<b>1,126</b>	<b>29.3%</b>

Source: U.S. Census Bureau – American Community Survey (5-year estimates)

A related trend affecting commuting patterns is the increased numbers of persons who work from home. The number of home-based workers in the study area Census tracts increased about 40% in the period to an estimated 221 residents.

*ZIP Codes.* The three core downtown ZIP codes (73102, 73103, and 73104) are used in Figure 54 to provide an alternative view of the commuting patterns of residents in the central business district.

Between 2011 and 2017, the most recent years of available data, the share of resident workers commuting by auto declined from 89% to 81%.<sup>68</sup> The estimate using ZIP codes suggests a larger drop in traditional auto-based commuting than the Census tract data.

<b>Figure 55. Means of Transportation to Work - Study Area ZIP Codes (73012, 73103, 73104)</b>						
<b>Mode of Transportation</b>	<b>2011</b>		<b>2017</b>		<b>2010-17</b>	
	<b>Total</b>	<b>Share</b>	<b>Total</b>	<b>Share</b>	<b>Change</b>	<b>Percent Change</b>
Car, truck, or van	3,904	88.5%	4,563	80.7%	659	16.9%
Public transportation (excluding taxicab)	67	1.5%	76	1.3%	9	13.4%
Bicycle	74	1.7%	74	1.3%	0	0.0%
Walked	206	4.7%	624	11.0%	418	202.9%
Taxicab, motorcycle, or other means	47	1.1%	49	0.9%	2	4.3%
Worked at home	112	2.5%	265	4.7%	153	136.6%
<b>Total</b>	<b>4,410</b>	<b>100.0%</b>	<b>5,651</b>	<b>100.0%</b>	<b>1,241</b>	<b>28.1%</b>

Source: U.S. Census Bureau – American Community Survey (5-year estimates)

The number of residents either commuting to work by some form other than auto or working from home doubled to approximately 1,100 between 2011 and 2017. The share of those walking increased from 4.7% (206 persons) to 11.0% (624 persons), while the number of persons walking tripled. Persons working from home in the three ZIP codes more than doubled from 112 in 2011 to 265 in 2017, with a current share of 4.7% of downtown workers now working from home.

The trend toward more non-traditional forms of commuting is expected to accelerate in coming years as downtown residential options expand. The shift in commuting methods of downtown residents runs counter to highly stable trends at the city level. Citywide transportation patterns have remained largely unchanged since 2010 with 94% of residents commuting to work by auto.

### **Streetcar Area Economic Profile – Three-Block Impact Zone**

Beyond its role in transportation, the introduction of the downtown streetcar system carried clear economic development goals:

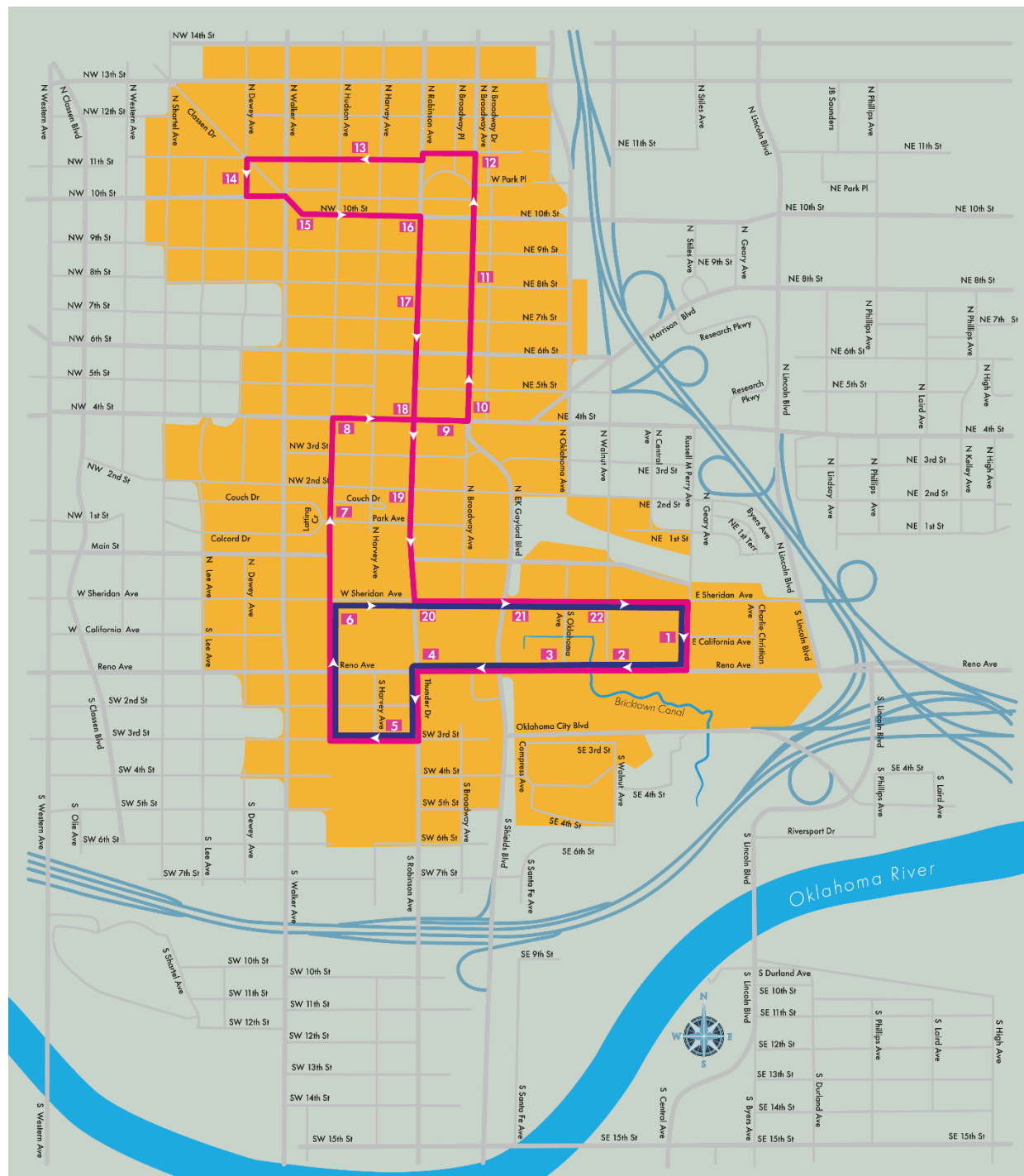
1. Boost the overall quality of life for all Oklahoma City residents;
2. Leverage private economic development through public investment; and
3. Contribute to the creation of new jobs in the Downtown area.

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.

The City of Oklahoma City Planning Department denotes a three-block impact zone around the path of the streetcar as the area believed to be most influenced by the presence of the streetcar. The distance

of three city blocks is judged to be the approximate distance at which pedestrians will regularly walk to take advantage of public transportation such as a streetcar that functions as a city circulator. This is also the buffer around the transportation line in which the greatest investment by the private sector is anticipated. The 3-block zone around the streetcar line is illustrated in Figure 55.

**Figure 56. Streetcar 3-Block Impact Zone**



Source: Greater Oklahoma City Chamber



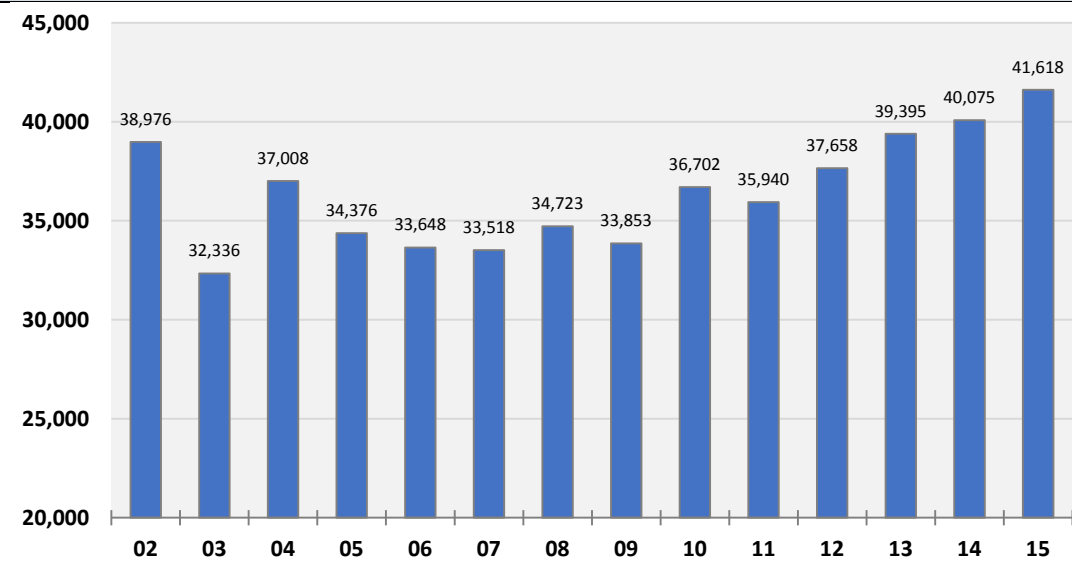
**Employment Growth.** An anticipated source of regular streetcar use is from employees who work in the downtown area. The streetcar is centered around the most concentrated private employment base in the state. The approximately 35,000 jobs in the central downtown ZIP code (73102) represent the largest number of jobs in a single ZIP code in Oklahoma and the highest concentration of private employment per square mile in the state. The core downtown ZIP code (73102) also has the highest population concentration per square mile of all non-college campus ZIP codes in Oklahoma (OSU is highest).

When narrowed down to the 3-block impact zone around the streetcar, employment is highly concentrated. Using LEHD employment data for 2015, the most recent year of data available, approximately 41,600 jobs were based within the 3-block impact zone around the streetcar path.

Employment in the impact zone expanded rapidly beginning in 2009 after reversing a long-term downtrend. Figure 56 illustrates total employment within the 3-block zone in the 2002 to 2015 period. Downtown employers within 3 blocks of the line added approximately 8,000 net new jobs between 2009 and 2015, a 23% increase. Approximately 8 of 9 total jobs created in the full study area between 2009 and 2015 are within three blocks of the streetcar line. The 23% job gain near the streetcar line also outpaced the 17% gain across the full study area, as well as the gain for the county (12.4%), metro area (12.5%), and state (8.0%) in the period.

Since the 2011 announcement of the streetcar path, 5,700 jobs (15.8% increase) have been added in the impact zone. This represents approximately 85% of the nearly 6,600 total jobs created since 2011 in the full study area. The base of new workers within the 3-block zone who are potential daily streetcar riders is expected to increase steadily as the downtown workforce expands over time.

**Figure 57. Employment in the Streetcar Impact Zone**



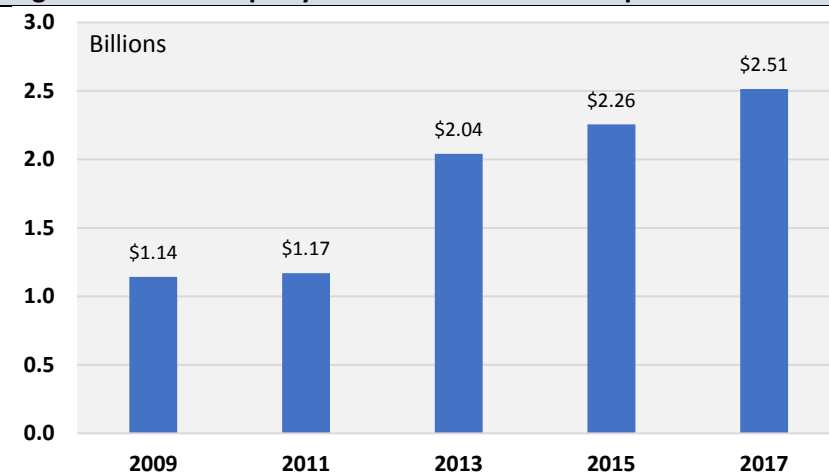
Source: U.S. Census Bureau - OnTheMap

**Assessed Property Valuation Growth.** A critical component of the streetcar evaluation is the degree to which downtown investment activity aligns and property valuations respond along the permanent path of the streetcar. Currently, properties located in the 3-block area represent approximately 65% of the total valuation of taxable property across the Census tracts in the downtown study area.

Significant activity has been underway in recent years along the streetcar path and is reflected in sharply increased property values in the 3-block impact zone since the path of the streetcar was announced in 2011. The cumulative value of these properties more than doubled in market value (115% gain) from 2011 to 2017 (see Figure 57). In tax year 2017, property with a total assessed market value of \$2.5 billion was located within 3 blocks of a streetcar stop.

A significant portion of the gain overall, particularly between 2011 and 2013, is the opening of Devon Tower. However, substantial gains have been realized beyond the contribution of Devon's new headquarters and have outpaced overall gains in the area. The 115% gain in the 3-block impact zone exceeds the 87% gain across all Census tracts in the full study area from 2011 to 2017. Market values in the 3-block zone also increased at more than three times the rate of total citywide property values (34% gain) since 2011.

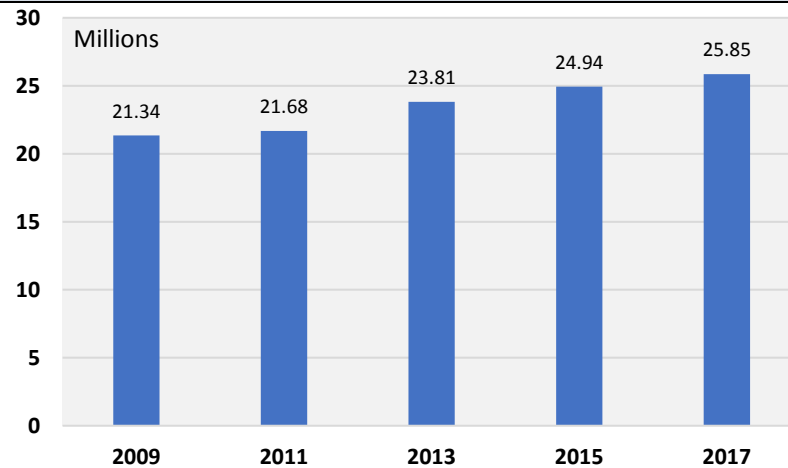
**Figure 58. Total Property Valuation in Streetcar Impact Zone**



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

**Rising Square Foot Values.** On a square footage basis, average property values in the 3-block zone have increased from \$54 in tax year 2011 to a reported \$97 in tax year 2017, a more than 80% 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% in the first block, 85% in the second block, and 80% in the third block. The gains in the three-block zone also far outpaced the 20% citywide gain in property values on a per square foot basis in the period.

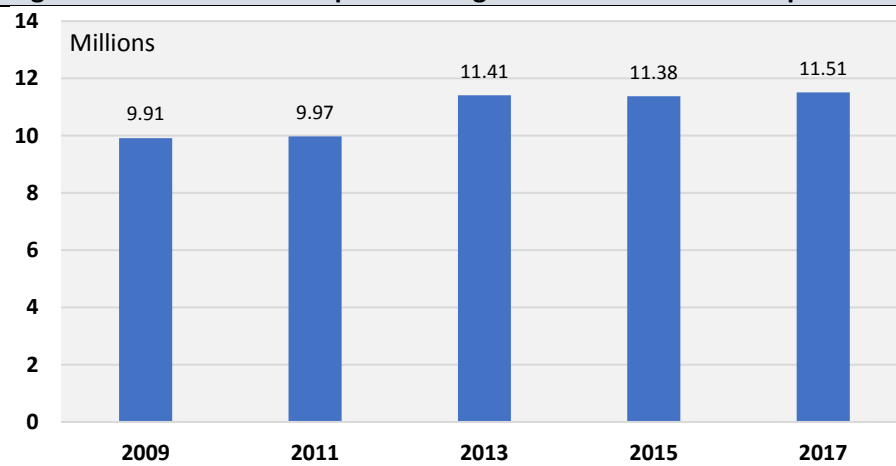
**Square Footage Growth.** The Streetcar is also expected to increase the density of development along the permanent path. Since the path was announced in 2011, total square footage in the three-block zone is being utilized far more intensively. Square footage of properties of all types has increased 19.2% within 3 blocks of the streetcar line. This outpaced 16% growth in the full downtown study area and 12% 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.

**Figure 59. Total Property Square Footage in Streetcar Impact Zone**

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

Growth in total downtown square footage is radiating outward from the path of the streetcar. Since 2011, total square footage has increased 11.6% in the block adjoining the path, 14.6% in the second block from the path, and 19.2% in the third block from the streetcar line. This radiating pattern is expected given that large segments of the streetcar's path is adjacent to more highly established and densely developed structures. Nearly all the square footage gains two and three blocks from the streetcar path reflect new office and residential development.

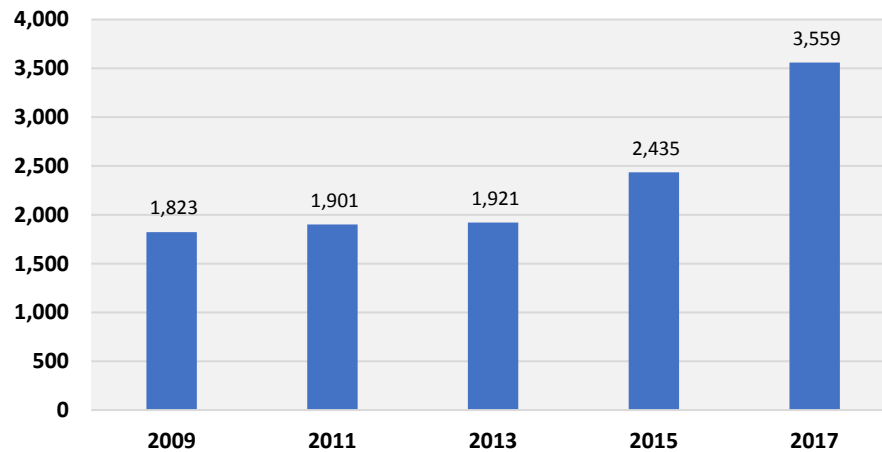
**Office Space.** The office market and downtown employment are closely tied to the long-run strategy underlying the streetcar system. Approximately 1.54 million square feet of net new office space has been added (15.4% gain) within three blocks of the streetcar line since 2011. Much of the added space (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 BOK in Oklahoma City, is added to the tax rolls in tax year 2018.

**Figure 60. Office Market Square Footage Growth in Streetcar Impact Zone**

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

**Residential Unit Growth.** In addition to downtown workers on weekdays, residents in the 3-block vicinity of the streetcar are expected to provide consistent ridership during both weekdays and weekends. Visible growth in residential structures the past few years continues to contribute to this base of potential riders. Based on county assessment data, the number of downtown residential units located within 3 blocks of the streetcar path has nearly doubled to more than 3,500 since the streetcar path was announced in 2011. Housing unit growth accelerated rapidly after 2013. Of the 1,658 residential units added between 2013 and 2017, 124 units were located in the first block adjacent to the line, 734 units in the second block, and 800 units in the third block.

**Figure 61. Housing Units in Streetcar Impact Zone**



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

**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 central business district (1,664 rooms) than in Bricktown (1,499 rooms). However, nearly all the rooms in the study area are located within the 3-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.

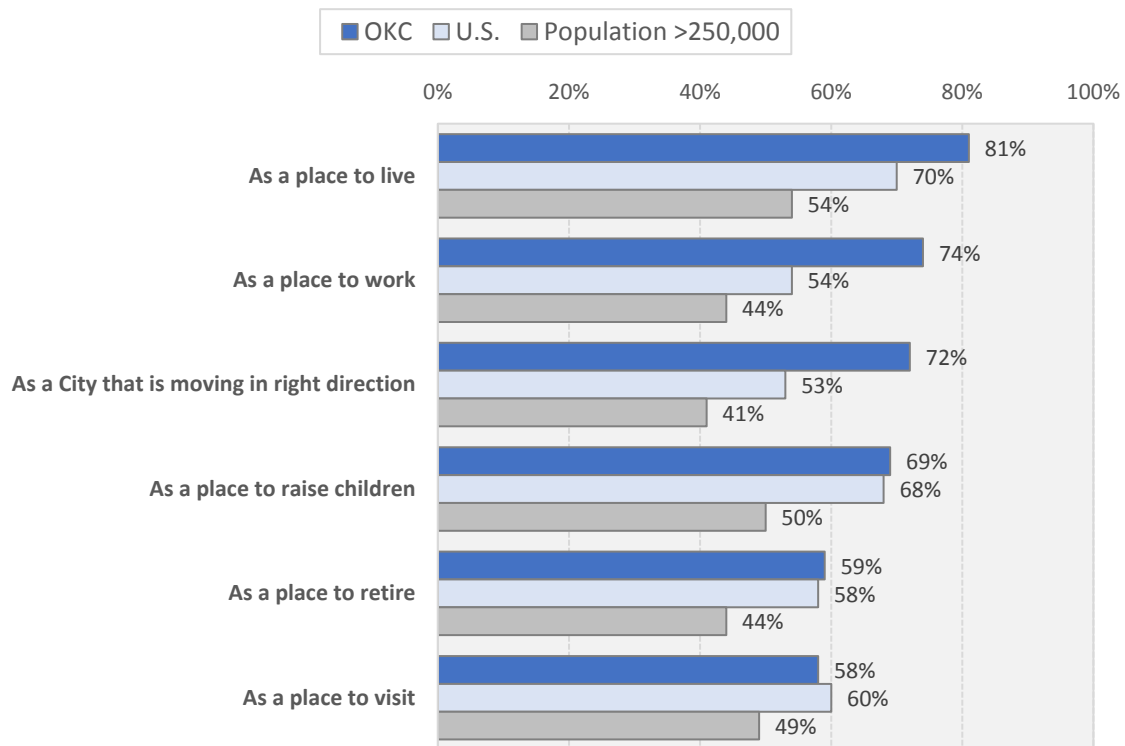
## IX. Citizen Satisfaction

A final element of the MAPS evaluation is an assessment of the satisfaction level reported by citizens with city government and the direction the city is headed. This is aided by results from the city's long-standing program of surveying citizens to measure their satisfaction with and perception of the city.

Recent results suggest that resident satisfaction with the city remains quite high relative to the nation and peer cities. Figure 62 summarizes the city's overall ratings from the 2018 OKC citizen satisfaction survey. The ratings are based on the combined percentage of citizens giving the city a rating of either excellent or good on each measure.

Relative to the U.S. and large peer cities with population of 250,000 or more, Oklahoma City continues to receive a higher rating on nearly every overall measure of satisfaction. Citizens give Oklahoma City a far higher rating as both a place to live (82%) and work (74%). As a place to live, the city exceeds the national average (70%) by more than 10 percentage points and large city peers (54%) by more than 25 percentage points. Even larger gaps are reported for a place to work, with Oklahoma City receiving a premium of 20 percentage points relative to the nation (54%) and a 30-percentage point gap over large peer cities (44%).

**Figure 62. Overall Satisfaction Rating of City Residents (2018)**



Source: City of Oklahoma City Citizen Survey (2018)

The question most relevant 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% of OKC citizens rated the city as excellent or good. This is the area in which other peer cities around the country receive their lowest ratings. Nationally only 53% of cities report high satisfaction levels with the direction the city is moving.

For cities over 250,000 in population, only 41% report citizens being highly satisfied with the direction the city is moving. The 72% satisfaction share reported in Oklahoma City exceeds the national share by almost 20 percentage points and large city peers by more than 30 percentage points.

On the city's attractiveness as a place to raise children, Oklahoma City is rated by citizens slightly higher than the nation (69% vs. 68%) but nearly 20 percentage points above the peer group of large cities (50%).

National-like responses are also reported for Oklahoma City as a place to retire (59%) and a place to visit (58%). However, the city far exceeds the satisfaction reported across large peer cities as a place to retire (44%) or visit (49%).

## X. Summary of MAPS Evaluation

The MAPS initiatives remain the largest and most visible public economic development efforts undertaken in Oklahoma City the past 25 years. The projects now serve as the centerpiece of 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 the downtown area.

**2009 MAPS Report Findings.** The prior evaluation of MAPS released in 2009 concluded that the projects halted years of stagnation in 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 \$7.0 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 tracked since 2000 continue to post sizeable gains in value.
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 conference destination is on the verge of rising to a higher tier nationally.** The long-standing objective to enhance the city's standing as a conference 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. Citizens 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% of OKC citizens rated the city as excellent or good. Nationally only 53% of cities report high satisfaction levels. For cities over 250,000 in population, only 41% report citizens being highly satisfied with the direction the city is moving.

## **XI. 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.



## XII. Endnotes

<sup>1</sup> <https://newsok.com/article/5505468/oklahoma-citys-growth-a-path-thats-unsustainable>

<sup>2</sup> Oklahoma City is the fifth largest city in the continental U.S. by land area and stretches across four counties (Oklahoma, Canadian, Cleveland, and Pottawatomie). It is only slightly smaller than the combined areas of Dallas and Fort Worth (685 square miles).

<sup>3</sup> The effort called ‘Finish MAPS Right’ called for a six-month extension of the one cent sale tax. The initiative passed with a 67% majority. See: <https://newsok.com/article/3454837/history-of-the-maps-projects-timeline-timeline>

<sup>4</sup> [https://en.wikipedia.org/wiki/Oklahoma\\_City\\_Dodgers](https://en.wikipedia.org/wiki/Oklahoma_City_Dodgers)

<sup>5</sup> See: <https://www.10best.com/awards/travel/best-minor-league-ballpark/>; and <https://ballparkdigest.com/2018/06/14/best-of-the-ballparks-2018-triple-a-first-round/>; <https://bleacherreport.com/articles/842135-power-ranking-the-25-coolest-minor-league-stadiums#slide15>

<sup>6</sup> [http://www.espn.com/nba/attendance/\\_/year/2018](http://www.espn.com/nba/attendance/_/year/2018)

<sup>7</sup> For a discussion of the role played by school integration see: <https://newsok.com/article/3558966/integration-dramatically-reduced-oklahoma-city-schools-population>

<sup>8</sup> The MAPS for Kids program implementation plan is available online at:

<https://www.okc.gov/home/showdocument?id=1816>

<sup>9</sup> See: “MAPS for Kids: Building a Learning City.” Project KIDS Report. August 9, 2001.

<sup>10</sup> John Rex Elementary in downtown cost \$12 million and was funded through a combination of MAPS for Kids, TIF funding, and private donations.

<sup>11</sup> <https://www.okc.gov/government/maps-3/maps-history/maps-for-kids/ocmaps-trust>

<sup>12</sup> See: <https://www.okc.gov/home/showdocument?id=1816>

<sup>13</sup> See: [https://www.sai.ok.gov/olps/uploads/okcps\\_63012\\_jzbl.pdf](https://www.sai.ok.gov/olps/uploads/okcps_63012_jzbl.pdf)

<sup>14</sup> See: <https://www.okcps.org/Page/2451>. The proceeds were split \$106.3 million for maintenance, fine arts, and athletics; \$54.5 million for information technology; and \$19.2 million for transportation-related purchases of buses and support vehicles.

<sup>15</sup> See: *Housing Market Preference and Demand Study*. 2013. Economic and Planning Systems, Inc. Available online at: <https://www.okc.gov/home/showdocument?id=10091>

<sup>16</sup> <https://newsok.com/article/5617290/data-shows-inefficiencies-in-okc-district-schools>

<sup>17</sup> For a discussion of the issues underlying utilization of district resources, see:

[https://www.okcps.org/cms/lib/OK01913268/Centricity/Domain/1312/Pathway%20to%20Greatness\\_Overview%20Slides%20v2.pdf](https://www.okcps.org/cms/lib/OK01913268/Centricity/Domain/1312/Pathway%20to%20Greatness_Overview%20Slides%20v2.pdf)

<sup>18</sup> Information on Pathway to Greatness is maintained online at: <https://www.okcps.org/Page/3462>

<sup>19</sup> Information on the most Pathway to Greatness recent recommendations is available at:

<https://www.okcps.org/site/default.aspx?PageType=3&DomainID=4&ModuleInstanceID=5049&ViewID=6446EE88-D30C-497E-9316-3F8874B3E108&RenderLoc=0&FlexDataID=7380&PageID=1>

<sup>20</sup> The status of the Better Streets, Safer City program is available online at:

<https://data.okc.gov/portal/custom/viewer?datasetName=Better+Streets+Safer+City+Summary&view=betterstreetssafecity>

<sup>21</sup> The same vote approved a permanent one-quarter cent sales tax to hire 129 more police officers and 57 more firefighters with annual collections of approximately \$26 million to boost public safety.

<sup>22</sup> The full project list is available online at:

<https://data.okc.gov/portal/page/viewer?datasetName=All%20Propositions&view=table>

<sup>23</sup> In the 2009 report, tract 1091 is split into two tracts – 1031.1 and 1031.2 – based on the 2000 Census tract definitions.

<sup>24</sup> See: <https://kfor.com/2017/09/09/oklahoma-county-jail-population-falls-below-2000-inmates-lowest-level-in-years/>; also, <https://newsok.com/article/5577379/oklahoma-county-jail-improvements-seen-as-population-hits-record-low>

<sup>25</sup> For Oklahoma county jail population in the 1970 to 2014 period, see: <http://trends.vera.org/rates/oklahoma-county-ok?incarceration=count&incarcerationData=all>

<sup>26</sup> <https://newsok.com/article/5609196/city-county-department-planning-new-approach-to-justice-reform>

<sup>27</sup> See:

<https://www.okcchamber.com/index.php?submenu=CriminalJustice&src=gendocs&ref=CriminalJusticeReform&category=Main>

<sup>28</sup> <https://newsok.com/article/5609196/city-county-department-planning-new-approach-to-justice-reform>

<sup>29</sup> <https://newsok.com/article/5603212/ok-county-jail-numbers-show-impact-of-reforms>

<sup>30</sup> The year the structure was built refers to when the building was first constructed, not when it was remodeled, added to, or converted. The data relate to the number of units built during the specified periods that were still in existence at the time of the survey.

<sup>31</sup> <https://www.okc.gov/home/showdocument?id=2834>

<sup>32</sup> For a map of special zoning districts, see: <https://www.okc.gov/home/showdocument?id=4722>

<sup>33</sup> <https://acm.uco.edu/>

<sup>34</sup> <https://newsok.com/article/3722044/oklahoma-city-university-trustees-approve-law-school-move-to-downtown>

<sup>35</sup> Note methodology

<sup>36</sup> Results are from the 2018 survey. See: <https://homelessalliance.org/wp-content/uploads/2018/07/2018-POINT-IN-TIME-REPORT-1-1.pdf>

<sup>37</sup> <https://www.okc.gov/home/showdocument?id=2596>

<sup>38</sup> <https://homelessalliance.org/wp-content/uploads/2010/08/Final-Cost-of-Homelessness-study.pdf>

<sup>39</sup> Additional information on the Homeless Alliance is available online at: <https://homelessalliance.org/>

<sup>40</sup> For the 2018 survey, see: <https://homelessalliance.org/wp-content/uploads/2018/07/2018-POINT-IN-TIME-REPORT-1-1.pdf>

<sup>41</sup> For detailed information on the LEHD program, see: <https://lehd.ces.census.gov/data/>

<sup>42</sup> Estimates for the larger regions are derived from the County Business Patterns database. See:

<https://www.census.gov/programs-surveys/cbp.html>

<sup>43</sup> The initial MAPS projects assume a midpoint of sales tax receipts 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 Bureau of Labor Statistics measure of prices for all urban consumers at the U.S. city average.

<sup>44</sup> Estimates are based on a proprietary historical database of construction activity from McGraw-Hill Construction's Dodge Reports in the 2009 to July 2018 period. Approximately 440 projects are identified in the database in the period. Project locations were geocoded to identify those located within the downtown study area. On a small number of projects with no exact project value stated, the average of the high value and low value estimates is used. Projects were reviewed individually and partitioned into public and private sector groupings.

<sup>45</sup> A summary of property tax rules and regulations is available from the Oklahoma Tax Commission at:

<https://www.ok.gov/tax/documents/TES-14.pdf>

<sup>46</sup> [https://en.wikipedia.org/wiki/Devon\\_Energy\\_Center\\_\(Oklahoma\\_City\)](https://en.wikipedia.org/wiki/Devon_Energy_Center_(Oklahoma_City))

<sup>47</sup> <https://www.walterpmoore.com/projects/bok-park-plaza-tower>

<sup>48</sup> <https://www.pickardchilton.com/work/bok-park-plaza>

<sup>49</sup> Dropping the tax-exempt property produces a slight increase in the estimated gains in property value prior to 2013.

<sup>50</sup> <https://www.hotel-online.com/archive/archive-7834>

<sup>51</sup> <https://newsok.com/article/2688059/hotels-grand-opening-today-marriott-renaissance-will-bring-311-new-rooms-to-downtown>

<sup>52</sup> The Hilton Garden Inn and Homewood Suites are adjoining properties at 328 E Sheridan Avenue.

<sup>53</sup> <https://www.omnihotels.com/media-center/recent-news/omni-hotels-breaks-ground-in-oklahoma-city>;

<https://newsok.com/article/5601955/omni-hotel-construction-set-to-start-in-september-in-oklahoma-city>

<sup>54</sup> The report is available online at: [http://uli.org/wp-content/uploads/ULI-Documents/Oklahoma-City\\_10.pdf](http://uli.org/wp-content/uploads/ULI-Documents/Oklahoma-City_10.pdf)

<sup>55</sup> <http://www.gometro.org/fgp/>

<sup>56</sup> The city's transportation plan is available online at: [http://planokc.org/wp-content/uploads/2018/01/planokc\\_121417\\_connectokc.pdf](http://planokc.org/wp-content/uploads/2018/01/planokc_121417_connectokc.pdf)

<sup>57</sup> <http://planokc.org/getting-started/>

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<sup>58</sup> For a full listing of EMBARK services, see: <https://embarkok.com/learn/services/>

<sup>59</sup> Service miles are scheduled revenue miles plus scheduled dead head miles minus missed miles. Some of the reason missed miles occur are accidents, breakdowns and passenger conflicts or illness.

<sup>60</sup> <http://journalrecord.com/2018/12/07/okc-wins-14-3-million-grant-for-bus-rapid-transit-system/>

<sup>61</sup> The Northwest Corridor cost-benefit study is available online at:

<https://www.okc.gov/home/showdocument?id=10904>

<sup>62</sup> <https://www.okgazette.com/oklahoma/with-santa-fe-station-renovations-complete-the-focus-is-on-connecting-more-modes-of-transit-to-the-hub/Content?oid=2993319>

<sup>63</sup> See the state's 2018 Rail Plan at: [https://www.ok.gov/odot/documents/OK\\_StateRailPlan\\_Final\\_2018.pdf](https://www.ok.gov/odot/documents/OK_StateRailPlan_Final_2018.pdf)

<sup>64</sup> <http://spokiesokc.com/>

<sup>65</sup> See: <https://www.bird.co/>; <https://www.li.me/electric-scooter>

<sup>66</sup> See: <https://newsok.com/article/5618050/scooter-regulations-promote-new-transportation-option-in-oklahoma-city>

<sup>67</sup> See: <https://newsok.com/article/5618101/scooters-official-as-okc-council-adopts-regulations>; and <https://newsok.com/article/5618364/oklahoma-scissortales-okc-scooter-ordinance-a-workable-fit>

<sup>68</sup> ZIP code delineated data on commuting patterns is available beginning in 2011.