

EXECUTIVE SUMMARY

IMPACT ANALYSIS OF MAPS AND OTHER SIGNIFICANT CENTRAL CITY INVESTMENTS

**prepared for
Central City Development
Greater Oklahoma City Chamber of Commerce**

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Introduction

In the spring of 2003, the Central City Development office of the Greater Oklahoma City Chamber of Commerce commissioned a study to explore the impact of the MAPS (Metropolitan Area Projects) and other major central city investments on the city's core area. This Executive Summary reviews selected observations and conclusions from the larger study.

The opening of the Bricktown Ballpark in the spring of 1998 focused the attention of the people of Oklahoma City on the first of the MAPS package of major downtown projects whose financing they had approved in December 1993. MAPS applies to the \$350 million set of projects funded by a temporary one-cent sales tax. Except for some improvements at the Fair Park and the dam-lock-lake improvement to the North Canadian River, the MAPS projects are all located in the city's downtown central core.

Following the Ballpark opening were a motorbus Trolley Transit System (1999), the Bricktown Canal (1999), the major expansion and rehabilitation of what has become known as the Cox Business Services Convention Center (1999), a reconstruction of the Civic Center Music Hall (2001), the Ford Center Arena (2002) and the Library/Learning Center (expected in late 2003).

While these MAPS investments are together the most prominent recent developments in Oklahoma City's central core, they have been accompanied by numerous other new investments including massive developments at the Oklahoma Health Center, two new downtown hotels, a new Oklahoma City Museum of Art, the Oklahoma City National Memorial and museum honoring the victims of the 1995 Murrah Federal Office Building bombing, two major new office buildings, a large upscale

apartment complex, and a Bass Pro Shops mega-sporting goods store. And much more investment is in the pipeline including many projects at the Oklahoma Health Center, three major parking garages, a 16-screen motion picture complex, a 245-room Embassy Suites Hotel, and additional major apartment construction.

Though the above litany of investments is incomplete, the listing is long enough to illustrate the challenge of sorting out and digesting all that has occurred in downtown Oklahoma City since the early 1990s. More detail is provided in Table 1, with current and planned investments in the study area and nearby adding to over \$2 billion. All of the developments are linked, to varying degrees, to each other and to the basic Oklahoma City central core that has been evolving since the original land run settlement in 1889.

The linkages emphasized in the study are important in determining the pattern and extent of new investment in the city over the long term. Of course there are the normal economic linkages in which, for example, the presence of governmental units administering justice attracts the location of the offices of law firms and ancillary legal services. But there is more to it than these connections. Contemporary urban studies emphasize linkages between the locational decisions of the “creative class” or “sophisticated consumers of place” and the presence of central core amenities involving arts, culture, recreation, education, and health care.

It is emphasized that the linkages referred to in this study are important to capital investment decisions. They do not refer to the sorts of short-term interactions of the economists’ input-output models which develop propositions about how increases in employment or income in a particular sector leads, say, to overall increases in employment and income throughout Oklahoma County.

Table 1 Recent and Planned Investment in the Central City Projects 1994-2003 and Beyond

Project	Millions of Dollars	
	Actual	Planned
MAPS Projects		
SBC Bricktown Ballpark	34	
Trolley	5	
Bricktown Canal	23	
Bricktown Canal Additions	3	
Cox Convention Center	63	
Civic Center Music Hall	52	
Ford Center	88	
North Canadian River	54	
Library Learning Center	22	
Oklahoma City National Memorial	29	
Oklahoma City Museum of Art	22	
Myriad Gardens	2	4
Hotel Development		
Renaissance OKC (2003 market value)	31	
Courtyard by Marriot	18	
Skirvin Hotel		30
Embassy Suites	35	
Office Development		
Sonic Corporation	12	
Federal Campus	40	
Choral Directors Association	2	
Enterprise Center at First National		1.9
County Investors Capital Building		0.7
Retail Development		
Scaramucci - Nona's Bricktown		1.5
Oklahoma Health Center	270	323
St. Anthony's Hospital		200
16-Screen Harkins Theatre Complex	14	
Bass Pro Outdoor World	18.8	
Apartments/Housing		
Deep Deuce (2003 market value)	13	
Legacy Summit Apartments		26
Sherman Ironworks		40
500 West Main		5.5
Sieber Hotel Apartments		5

Table 1 Recent and Planned Investment in the Central City Projects 1994-2003 and Beyond (cont.)

Parking		
COPTA Parking Garage (Galleria)	22	
County Parking Garage	11	
Bricktown Garage ('03 market value)	4	
Bricktown North	1	
Arena / Hotel Garage		2.5
Bus Transfer Station	4.8	
Investments Adjacent to Central City		
State Supreme Court	24	
State Capitol Dome	21	
Oklahoma History Center	54	
Native American Cultural Center		100
I-40 Realignment		350
Land Run Monument		5
Total	942.8	1139.1

In the remarks that follow, a framework for looking at linkages is developed with the aid of analyses of the demographic and economic structure of a specifically defined study area which is essentially the core of the city. This framework suggests a view of the study area as consisting of four relatively separate economic systems. Highlights concerning the operations and performance of the MAPS and other selected new investments will illustrate the truly dynamic renaissance of Oklahoma City's central core and the varied forces generating this momentum. Concluding remarks point to continuing challenges and end with a note of optimism.

The Study Area Defined

To the extent possible, the data and discussion of the study apply to an area in central Oklahoma City bounded by I-40 on the south, the east edge of the Oklahoma Health Center on the east, 23rd Street on the north, and Classen Boulevard on the west.

The area does not include the State Capitol complex to the north east, but it is very much affected by that complex. Nor does the area extend south between I-40 and the North Canadian River, though it will be seen that there are strong forces at work tending to pull the central core in that direction.

The Four Economies

The search for understanding the fundamentals of economic linkages within the study area leads naturally to attempts to simplify and sort things out. Throughout the analyses it is helpful to think of the study area as consisting of four quasi-separate economies.

- **The Traditional Economy** consists of the set of economic activities which have been part of the downtown scene virtually since the beginnings in the 1890s. This includes government activities ranging from federal courts to the county jail, federal, city, and county general government offices, together with an extensive infrastructure of law offices. It also includes old main-line activities such as oil and gas companies, utilities, and financial institutions. The Traditional Economy is also linked to two specific residential neighborhoods in the northern part of the study area.
- **The Health Economy** includes the large set of health related organizations at the Oklahoma Health Center (OHC) on the eastern side of the study area, together with a smaller but significant cluster of health activities including and around St. Anthony Hospital just north of the downtown area. Given the advanced technology of today's health care, and especially as related to the OHC's biotech

research park, this could also have been called the “New Economy” segment of the study area.

- **The Culture/Recreation Economy** includes the major MAPS investments attracting people to the downtown area for various entertainment events and recreation activities. Also included are visits to recently-completed museums. For the most part, this economy also includes hotels, and the eating and drinking establishments of the city’s old warehouse district (Bricktown).
- **The Low Socioeconomic Status (SES) Economy** Except for its northernmost neighborhoods and three apartment complexes further south, the residents of the study area generally have relatively low incomes, low levels of educational attainment, and live in low-value housing units. Particular in the southwestern part of the study is a concentration of homeless individuals at virtually the lowest level of SES.

Demographic Structure

The demographic structure of the study area is an important determinant of the attractiveness of the study area for new residents and, in some cases, for the location and continued presence of businesses. This structure is much less important as a determinant of labor supply for study area establishments; at least 90 percent and perhaps more of the study area jobs are filled by workers commuting from outside the area.

The latest comprehensive population and housing data for the study area are from the 2000 U.S.Census of Population. The area contains 13 “census tracts” which typically consist of around 20 to 30 city blocks. In 2000, these tracts had 9,106 residents—up

from 8,337 in 1990. This growth was entirely due to more institutionalized residents such as those in the county jail. The area's noninstitutionalized population actually fell from 7,195 to 6,543.

The study area's noninstitutionalized population in 2000 was 1 percent of the total for Oklahoma County. For the typical U.S. city, the downtown population share tends to be around 2 percent. This emphasizes a recurrent theme that Oklahoma City's central core needs a larger number of residents.

The size and quality of any area's stock of housing has important implications for the size and characteristics of the area's population. In 2000, the number of housing units in the study area was 4,165—down from 4,730 in 1990. This, alone, reflects an increase in quality; virtually all the decline in housing units during the decade is explained by a decline in vacant units which were often among the poorest of quality.

The quality of the housing stock in the study area's three northernmost census tracts is quite high in comparison to the balance of the tracts. (The northernmost tracts are readily identifiable as including the Mesta Park and Heritage Hills neighborhoods.) About one-third of the area's population lives in these tracts.

The median value of owner occupied housing units in 2000 ranged \$180,700 in tract no. 1017 in the north to slightly less than \$40,000 in tracts no. 1030 and no. 1038 to the south.

As might be expected, the three northernmost tracts tend to be inhabited by families with high levels of educational attainment, relatively high attachment to the labor force, and high incomes. For those 25 and over in 2000, the three northernmost tracts reported an amazing 56.5 percent with bachelors degrees or above, compared with

only a 11.2 percent share in the rest of the study area. Four-fifths of the residents in the three northern tracts are white, while the population of the balance of the area tends to be split half white and half black, with a smattering of Native Americans and Asians.

Household incomes are much, much higher in the northern part of the study area. The 1999 poverty rate for the three northern tracts was a very low 7.2 percent; the rate for the balance of the study area was 42.1 percent. With a concentration of some of Oklahoma City's wealthiest residents in the north and excessive poverty in the south, the study area has a relatively small middle class. In 1999, for example, 49.4 percent of the households in Oklahoma County reported incomes in the \$25,000-\$74,999 range; the share for this middle class group for the study area was only 30.9 percent.

An important warning concerning these north-south generalizations relates to minor concentrations of relatively well-to-do residents at three significant apartment complexes in the south, i.e. Sycamore Square, Regency Tower, and the new Deep Deuce at Bricktown complex.

There are probable linkages between demographic structure and the four economy framework discussed above. Employed residents of the three northernmost tracts and the three upscale apartment complexes are very likely to be linked to the Traditional Economy and the Health Economy. Indirect evidence of this is found in census data on average commuting time. For tract no. 1017 in the heart of Heritage Hills, the average time was only 12.8 minutes—a figure quite consistent with a drive downtown or to the Oklahoma Health Center. Many of the study area's other residents are in the Low SES Economy. Some are no doubt employed in low-skill jobs in office maintenance, at MAPS venues, hotels, and in the Bricktown eating and drinking establishments.

Economic Structure

Economic structure is measured by variables such as number of establishments, employment, and payroll for various industry classifications. Because of the dominance of business and government activity in the central core, economic structure includes more information about the study area than demographic structure. It also provides insights into prospects for long term growth or decline.

Economic structure data are readily available by U.S. Postal Service ZIP codes. The study area is roughly congruent with three ZIP codes (73102, 73103, and 73104) and part of a fourth (73106). Mail boxes at the downtown postal facility use 73101. The four main ZIP codes are labeled Downtown Central Business District (73102), Uptown (73103), Oklahoma Health Center (73104), and Near Northwest (73106).

The Downtown CBD contains the greatest concentration of separate business enterprise found anywhere in the entire metropolitan area. It is also the site of the offices of both city and county governments and the 14-floor county jail holding around 2,500 prisoners. There are several federal government agency offices scattered around the CBD. A major hospital complex, St. Anthony, is in the northwest corner of ZIP 73102.

The southern part of the Uptown ZIP area includes many smaller office structures along with some empty lots and small, deteriorating commercial buildings. The area also includes a variety of small retail and service enterprises along NW 23rd Street and North Broadway between 10th and 23rd Streets. At the southwestern edge of this ZIP is the Bone & Joint Hospital.

Most of the economic activity within ZIP 73104 involves the specialized health services and health-related R&D of 26 organizations associated within the 300-acre Oklahoma Health Center complex. While the other three ZIP codes are geographically unified, much of the Oklahoma Health Center ZIP code is separated by a corridor consisting of the Burlington Northern/Santa Fe tracks and the Centennial Expressway. Access between the Health Center and the balance of the study area is limited to five streets with over/underpasses. An exception is the Bricktown recreation area which is adjacent to downtown and lies west of the expressway and tracks.

The sliver of the study area included in the eastern edge of the Near Northwest ZIP includes a variety of small enterprise along north-south streets Shartel Avenue, Classen Boulevard, and part of North Western Avenue. There are two major office buildings located in the 2000 and 2200 blocks of Classen Boulevard.

In 2001, the Census Bureau's *County Business Patterns* data indicate total employment of 43,573 for the five ZIP codes mentioned above. This is an overstatement because ZIP code 73106 extends well to the west of the study area. A reasonable estimate appears to be around 40,000. The study area's employment is probably around 15 percent of the total for Oklahoma County.

Human resources in the study area are much more productive than for much of the surrounding areas. Annual payroll per employee in 2001 for the three congruent ZIP codes was 46 percent higher than the countywide average (\$41,452 versus \$28,391).

A commercial statistical source (InfoUSA) was used to develop a detailed breakout of number of establishments by industry class (two-digit Standard Industrial Classification Code) for the three congruent ZIP codes plus the portion of ZIP 73106

within the study area. In 2002, there were 3,814 establishments scattered across a wide variety of industry classes. The most important of the classes in terms of number of establishments were Legal Services (1,379) and Health Services (390).

Casual observations about the limited scope of the study area's retail sector are borne out by more detailed *County Business Patterns* data. In 2001, for example, there was reported one men's clothing store, one women's clothing store, one tire dealer, and two gas stations with convenience stores.

It was also possible to use the InfoUSA source to explore the presence of various "high-tech" industries in the study area. The numbers are significant. In 2002, there were 35 establishments in "Computer and data processing services," 20 in "Research, development, and testing services," 43 in "Engineering and architectural services," and 48 in "Management and public relations services." This, together with the massive amount of health-related activity, suggests that Oklahoma City's central core has a structural base for future growth of the "New Economy" sectors.

The study area's asset base consists of structures, equipment, and infrastructure. An indicator of the scale of this base as it relates to businesses and households can be obtained by examining market value figures used for purposes of assessing the local property tax. Special data for this purpose was provided by the office of Mike Means, Oklahoma County assessor. In 2003, the aggregate market value for the study area was \$831 million or about 2.76 percent of the countywide total of \$30,123 million. Market value for the study area grew 41.2 percent between 1999 and 2003, while the countywide total grew at a much lower rate of 28.3 percent. Of course, the overall asset base is much greater because of the exclusion of not-for-profit and public facilities.

New Investments: Operations and Performance

The larger report to which this executive summary applies contains detailed information about MAPS and other major recent capital projects within and near the study area. Themes which are evident from these detailed discussions include the following:

- Many more people are recreating and/or doing business in the study area as a result of the investments listed in Table 1.
- Several of the projects have resulted in facilities so different and/or so improved that they are able to attract much higher quality performers and exhibits.
- The area's Health Economy investments are so extensive that it now appears that this sector has become the most important source of sustained growth within the study area.
- Investments underway and planned in the immediate proximity of the study area will have profound impacts.
- New and planned apartments and retail establishments are providing a much-needed balance to the study area.

More People--The MAPS projects together with the new Oklahoma City Museum of Art, the Oklahoma City National Memorial, and Bricktown eating and drinking establishments are attracting a massive increase in the number of people attending events and using downtown venues. The National Memorial is an especially significant attraction for out-of-state visitors. Many more people in the Oklahoma City

area are now familiar with Central Oklahoma City and are used to “coming downtown.”

Examples of intense usage of Central Oklahoma City attractions include:

- Cox Business Services Convention Center: 144 major events in 2002 with attendance of 567,000.
- Ford Center: Attendance during 2002-2003 of 750,000.
- Civic Center Music Hall: Attendance from July 2002 through April 2003 was 245,000.
- Bricktown: Annual visits estimated at 3-3.5 million per year.
- Oklahoma City National Memorial: Paid admissions, April 2002 through March 2003 of 250,000, with visitors largely from out-of-state.
- Oklahoma City Museum of Art: First year’s attendance almost 100,000.
- Myriad Botanical Gardens: Paid attendance generally about 80,000 per year.
- Spring Festival of the Arts: One-week event with visits of 750,000.

Downtown hotel development is very important in facilitating visits and in attracting convention business. The new 311-room Renaissance Oklahoma City Hotel and the soon-to-open 225-room Courtyard by Marriott Hotel are both located adjacent to the newly remodeled Cox Convention Center. It also now appears a virtual certainty that the elegant old Skirvin Hotel will be completely modernized.

New investment in off-street parking is a good indication of more people using Central Oklahoma City. Currently under construction are the following: a 625-space parking garage next to the new Courtyard by Marriott Hotel, a 1,050-space garage being built by county government, the city’s addition of a 1,000-space garage across the street from the new Library/Learning Center, and 1,050 ground-level spaces just north of Bricktown.

The continued expansion of a variety of functions at the Oklahoma Health Center generates more and more visits by patients, families, researchers, and business people.

For 2000, it was estimated that 180,000 patients were seen by Oklahoma Health Center care providers.

New Levels of Quality—New event and cultural facilities in the study areas are permitting Oklahoma City to experience levels of quality not previously attainable. The Oklahoma City Art Museum is equipped to handle traveling exhibits which could not have been seen at the organization's old facility at the fairgrounds. The remodeled Civic Center Music Hall, with its new stage, acoustics and seating, has developed a national reputation as a first rate venue for performances. For example, the Oklahoma City Philharmonic's 2003-04 season opened with cellist Yo-Yo Ma. And the totally new 20,000-seat Ford Center Arena is attracting popular performers unlikely to have appeared at the smaller old downtown Myriad facility or at the fairgrounds.

The Oklahoma Health Center (OHC) Growth Impulses—In addition to patients and others visiting this 300-acre complex, OHC is a major engine for employment expansion. With aggregate employment of 13,000 in the summer of 2003 and massive plans for new investment, this complex will continue to generate growth impulses for the downtown area. Of special interest are the remarkable developments at the OHC's Presbyterian Health Foundation Research Park. The physical facilities at the Park are already attracting a critical mass of commercial biotechnology enterprises.

Also very important to the study area is the complex of health activities around St. Anthony Hospital at the north edge of the downtown area. There are perhaps as many as 4,000 persons employed in that complex.

Developments Adjacent to the Study Area—Many visitors will be attracted to the new \$54 million Oklahoma History Center under construction in the capitol complex

just to the north of the study area. Plans are underway for a massive Native American Cultural Center along the North Canadian River immediately east of the study area. Financing for the project has already been partially arranged. With its location along I-40, this is bound to generate additional tourism. The lock-dam-lake project on the North Canadian River south of the study area is providing a type of water-based recreation near the downtown which had remained a planner's dream for many years. This beautiful asset will surely attract residential and commercial developments.

An above-grade section of Interstate 40 is the southern border of the study area. Plans have been made to realign that highway at grade level a few blocks to the south. When this is completed, it will generate development between the existing CBD and the river; the southern boundary of downtown Oklahoma City may be shifted south.

A New Residential/Retail Environment—Eating and drinking establishments are the one form of retail activity that has blossomed in the study area in recent years. The old warehouse district referred to as Bricktown is located just east of the CBD. In the summer of 2003, there were 22 restaurants and around a dozen nightclubs operating in Bricktown. All of this development occurred since the late 1980s. Two MAPS facilities were critical to Bricktown growth, i.e. the Bricktown Ballpark and the Bricktown Canal. These MAPS assets were also instrumental in the location of a major new office building largely housing the offices of the Sonic Corporation, and in the immediately planned construction of a 16-screen motion picture complex.

Another important retail development, also in Bricktown, is the 110,000 square foot Bass Pro Outdoor World. Although this facility will emphasize sporting goods and outdoor recreation equipment, it will also include a wider range of merchandise including

household goods and apparel. Given the current meager options in general merchandise retailing in the study area, this one store will result in a quantum increase in retail capacity.

Opportunities for more middle-to-high-income families and individuals living in the study area are growing. The 2001 opening of the Deep Deuce at Bricktown, 294-unit, apartment complex represented the first such major development in the study area in a couple of decades. Other major apartment projects on the drawing board include Legacy Summit at Arts Central near the Civic Center Music Hall and Oklahoma City Art Museum, and a \$40 million, 200-unit, complex to be built using old buildings in the center of the Bricktown warehouse district. Both Bricktown and the arts area have amenities that will attract residents—Bricktown for the recreation, and the arts area with the Art Museum and the soon-to-open MAPS Library/Learning center, both of which will have available a steady stream of cultural and educational programs.

Conclusions and Challenges

Concluding remarks emphasize important linkages that require nurturing. Some of these linkages operate almost entirely within the study area. Others, however, involve outside forces independent of any local direct influence.

Traditional Economy—These activities located largely within the Central Business District seldom benefit directly from MAPS and related investments attracting visitors and conventions. That would certainly not be the case if the study area's Traditional Economy possessed the kind of retail infrastructure present through the 1960s. Retailing is a field very much in need of nurturing and development.

The area's many oil and gas enterprises are linked to national and international energy markets, and to rates of resource depletion. Although this industry has been around Oklahoma City's CBD almost from the beginning, it certainly should not be taken for granted. Oklahoma's energy enterprises are often one step away from a move to Houston.

The CBD is likely to remain a center of legal and government activity, if for no other reason than the importance of a truly central location for many services and extensive fixed investment in facilities. Agency budgets and capital spending decisions are heavily influenced by the cyclical vagaries of tax revenues. Though main activities will stay put, this does not mean that in an information age, certain data management activities of government could not be rather easily moved to suburban locations—moves which would be applauded by favored city council members. Bureaucrats and lawyers both need to have decent office space and adequate parking facilities.

Virtually the same point can be made about the clerical activities of banking and utilities offices located downtown. These represent industries that have been subject to new and often less heavy-handed regulation during the past three decades. Aside from retail banking outlets, it is easy to conceive of gas, electric, telephone, and banking functions in suburban locations. Again, it is important that these enterprises appreciate CBD amenities.

The Health Economy—The principal demand for the services of the Health Economy are related to health care itself such as health insurance coverage, government appropriations and subsidies, health technology, and the demography of a population soon to include relatively more older people. Health research is very dependent upon the

federal agencies such as the National Institutes of Health. The biotechnology business firms locating at the Oklahoma Health Center's Presbyterian Health Foundation Research Park should arguably be treated as the single most important showpiece for long-term high-tech development in Oklahoma City's central core.

Efforts must continue to manage development of a corridor between the OHC and the rest of the study area with emphasis on the Flatiron District. Accommodations must be developed to enhance the attractiveness of the area around St. Anthony Hospital and better access to that facility.

The Culture/Recreation Economy—In 2003 there was certainly much momentum in this sector generated by the recent opening of the downtown MAPS venues, the Art Museum, and the Oklahoma City National Memorial. These are linked closely to hotel development, the growth of eating and drinking establishments in Bricktown, and to new and planned apartment development. Significant capacity needs in this sector include additional hotel rooms and a much expanded and improved exhibit hall in the Cox Convention Center.

The Culture/Recreation Economy is particularly important in attracting young professionals to live downtown. While the night life of Bricktown is attractive to this group, it is also possible that the new investments in the study area will make it a more attractive place for more mature residents. The more sedate components of the Culture/Recreation Economy may attract this rapidly expanding population group—assuming appropriate amenities and retailing within walking distance.

The Low SES Economy—The main linkage for this group is with the study areas stock of low quality, low value housing units. There is a natural tendency, evident in the

1990s, for this group to be crowded out of the area as new or remodeled housing is substituted for low-value units. This process of gentrification may only displace a problem population to other neighborhoods within the city.

The significant homeless component of the Low SES Economy really has no linkages—except perhaps to organizations providing services such as rescue missions. It is expected that, in the long run, increasing general prosperity throughout the economy together with preventive services will reduce but not eliminate this situation.

A Note of Optimism

This executive summary emphasizes how MAPS and other major investments in the study area of Oklahoma City are having a profound and favorable impact on the urban core's environment. The presence of an increased number of conventions and visitors generates both the appearance and the reality of vitality. New structures make the area visually appealing to a degree that could hardly have been anticipated twenty years earlier. Access to cultural and popular events and activities is at a much higher level than before. The eating and drinking environment of Bricktown complements the events and has made downtown an attractive place to visit both day and night. There is an expectation of the construction of at least two major upscale apartment complexes which will facilitate increases in the central city residential population. The institutional infrastructure promoting the central core includes the Oklahoma City Urban Renewal Authority, the City of Oklahoma City, the Greater Oklahoma City Chamber of Commerce, Downtown OKC Inc., Oklahoma County, an Empowerment Zone, a Business Improvement District, and Tax Increment Financing. The massive investments at the

Oklahoma Health Center generate continued growth in health services as well as health-related R&D and commercialization. A previous image of a declining or static central core has been dispelled and it is *now OK to be downtown in OKC.*