DEMOGRAPHICS

1. Changing American Demographics

Aging Society & Gray Tsunami

The United States is an aging nation. By 2034, the US population will become the oldest in its history, with one out of every five Americans aged 65 or older. [1] By the mid-2030s, those 65 and older will outnumber the number of children (those under 18) for the first time.[2]

Baby Boomers

Born between 1945 and 1965, all Baby Boomers will be over the age of 65 by 2030.[3] Their preference to work in person means that as they retire downtown office vacancies may increase if younger generations continue to prefer hybrid work.[4] Already making up 35 percent of healthcare spending, Baby Boomers will need more supportive services as they age.[5] If downtowns continue to transform into livable urban centers, they could offer Baby Boomers the aspects of community they value the most, such as access to quality healthcare, healthy food, and safe, outdoor spaces.[6] But around half say they plan to move to a more remote location in the future.[7] Additionally, the isolation of pandemic lockdowns has shifted their lifestyle preferences, with many expressing a desire to age in their communities and near their family.[8] While Baby Boomers are also increasingly living alone, living in more connected downtowns could temper the negative physical and mental effects of isolation as they age.[9]

Generation X (Gen X)

Born between 1965 and 1980, Gen X will begin retiring in 2030.[10] Unlike work-motivated Boomers, they may continue to work because of financial insecurity, with 38 percent of Gen X saying that student loans will keep them from retiring.[11] As they are more likely than younger generations to prefer to work in-person, their persistence in the labor force could help keep downtown office space better occupied. However, they are also the generation buying the largest homes with suburban preferences.[12]

Millennials

Born between 1981 and 1996, Millennials continue to show a preference to live in urban centers that provide convenience to work, transit, and other daily needs.[13] While older Millennials have started to move out of city centers and into the suburbs, their rate of exit is slower than Gen Xers and Boomers, and young Millennials continue to move into the city center.[14] But, having faced two major recessions in their working lives, they have been slower to accumulate wealth than previous generations, which could make them a difficult group to keep downtown as housing becomes more expensive.[15] 70 percent of Millennials living in big cities or surrounding suburbs find their area hard to afford and 50 percent of Millennials say they are unhappy with their living situations.[16] While college educated, white Millennials have started to come into wealth parity with previous generations, Black and less educated Millennials have not: Black millennials have 52 percent less wealth than previous Black generations, while white millennials have a gap of only 5 percent compared to previous white generations.[17] This wealth gap has contributed to slow family formation, with less than half of Millennials being married.[18] The influence of the Millennial generation will continue to grow through this decade, as it is projected to make up 75 percent of the workforce by 2026. Millennials' preference for a hybrid schedule will continue to affect downtowns.[19]

Generation Z (Gen Z)

Born between 1996 and 2010, Gen Z will be the most ethnically diverse generation in history, with a majority projected to be non-white by 2026 and 22 percent having at least one immigrant parent.[20] So far, they continue to form households and have children at a slower rate than Millennials.[21] While Gen Z is on track to be the most educated generation in history, the pandemic disrupted their career paths.[22] Half of the oldest members of Gen Z reported that they or someone in their household had lost their job or received a pay cut during the pandemic.[23] This has led them to demand work-life balance and prefer a hybrid work schedule.[24] They are more likely to reside in cities or metropolitan areas than previous generations because of job opportunities and a preference for an urban lifestyle.[25] They place a high value on more modern amenities such as high-speed internet over traditional amenities like parking.[26] They value the environment and are getting their drivers licenses at lower rates than previous generations, showing a preference for alternative transportation options such as biking and rideshare.[27]

Gen Alpha

Born after 2010, Gen Alpha are the children of Millennials and the first generation to be born entirely in the 21st Century. The pandemic affected their formative years, but its impact on their childhood remains to be seen.[28] The oldest of the Gen Alpha generation will begin entering college, gaining independence, and charting career paths in the next five years.

Diversity

The 2010s is the first decade in which the white US population declined. All recent population growth comes from non-white demographics, and Latino growth has contributed the most to the US population in the past ten years.[29] Downtowns must expand efforts to be more culturally and language inclusive and diversify their decision-making bodies to match these macro-demographic trends.

Immigration

Immigration in the US has slowed, and Gen Z is less likely than Millennials to be born outside of the US but more likely to be the children of immigrants. Total US population growth is slowing and for the first-time immigration is making up the majority of population growth, illustrating its importance to US economic health and growth moving forward.[30]

Domestic Migration Patterns

Domestic migration continues to flow out of the Northeast, Midwest, and West, and into the South. People continue to move to less expensive and often smaller cities away from expensive, coastal, superstar cities.[31] As disruptive as the pandemic has been to nearly every aspect of life, it doesn't appear to have altered the underlying forces shaping which places are thriving or struggling,[32] although it did accelerate the rates of migration away from expensive cities to second-tier cities by allowing workers to access a wider array of appealing jobs in these cities remotely. These second-tier cities and smaller markets have developed amenities that have made them more attractive to college graduates, like revitalized downtowns, diverse restaurant scenes, more varied nightlife, and arts and cultural amenities usually reserved for larger cities.[33]

2. Talent & Labor

The Pandemic accelerated an already forecasted labor shortage that may force employers to rethink hiring and talent acquisition for years to come. Very low unemployment coupled with a strong labor market and high job openings means that workers have more power than usual. Some pandemic-induced trends quickly returned to normal in the post-pandemic labor market, while others have held firm and point to a more permanent shift. Women, who many feared would be left worse off in the job market after losing or quitting jobs at higher rates, have returned faster than men and now exceed their pre-pandemic employment rate.[34] The early retirement rush turned out to be only half-true. U.S. workers between the ages of 55-64 returned to work at rates comparable to their younger cohorts. However, those 65 and older (i.e., traditional retirement age) still have not returned in large numbers, and continue to be employed at lower rates than before the pandemic.[35] This trend will only accelerate as the Baby Boomer generation ages.

Pandemic border closures also slowed immigration which had increasingly filled in the labor gap created by the US's aging population.[36] Given the persistent strength of the economy despite warnings of a recession, the gap between job openings and available workers will only increase throughout the next couple of years.[37]

The talent-driven labor market continues to strengthen workers' ability to ask for increased flexibility in when and where they work and may contribute to under-enrollment in post-secondary education if employers reconsider and loosen job requirements to fill positions. To qualify a larger portion of potential workforce, employers could shift job qualifications away from education-based and towards skills-based. At the same time, improvements in artificial intelligence technology could help to alleviate the labor shortage by increasing the capacity of existing workers.[38]

The tech industry suffered after growing too fast to meet digital consumer demand during the pandemic's ecommerce boom, and its drawback has forced many tech-reliant downtowns to consider how they can foster economic diversity as they face high office vacancies.[39] Recent layoffs of hundreds of thousands of tech employees may benefit traditional employers who struggled to hire them before.[40] This is role reversal for those downtowns that long reaped the benefits of a tech sector that had led the way for several decades in terms of downtown economic development and revitalization.

The 'Great Resignation' seems more like an employee-empowered, 'Great Reshuffle' instead, as blue collar and service sector workers quit their jobs in search of better wages and benefits at much higher rates than knowledge workers.[41] Combined with reduction in issuance of nonresident work visas, many downtown prevalent industries like leisure, hospitality, health care, and social assistance face a higher-than-average job opening rate[42] while they are projected to add the most jobs of any industry through the rest of this decade.[43] As the US workforce continues to age and diversify, employers must support older workers and promote diversity and inclusion in the workforce to retain labor and attract talent.

LIFESTYLES

3. Future of Work

Worker preferences remain strong for a shorter work week and more flexible work arrangements that support an inclusive workplace and better work-life balance.[44] The percentage of full days worked from home peaked at 60 percent during the height of the pandemic. Since then, remote work rates have declined but appears to be staying constant at 28 percent of full work days. In July 2023, 12 percent of Americans were working fully remote, and another 29 percent were working hybrid schedules, but research shows that Americans want to work from home more than their employers currently allow them to. Downtowns could grow their foot traffic by attracting industries offering less remote work such as health care, real estate, and education as opposed to industries offering the most remote work like information and finance.[45] But ultimately, downtowns won't be able to rely on workers returning to the office at greater rates than they already have.

Beyond the persistence of hybrid and remote work, downtowns may face reduced foot traffic as a growing number of workers start freelance careers that keep them away from traditional office spaces,[46] and the wealthiest Americans start working shorter weeks for the first time in decades.[47] Five-days, 40-hours, and 9-to-5 all suddenly appear more antiquated than prior to the pandemic. Some employers have begun offering a four-day, 32-hour work week to recruit workers from a tight labor pool. Many have reported increased revenue, less employee burnout, and fewer resignations[48] due to improved well-being through reduced anxiety, better sleep, and more time for exercise.[49] Based on preferences noted earlier in the demographics section, this is expected to become more common as more Millennials and Gen Z take leadership positions in their careers. The potential end of the five-day work week could force many office-centric downtowns to redevelop into more complete neighborhoods to support their economies.

Workers are using hybrid and remote work to avoid the most unpleasant aspects of coming into the office. Overall, cities with longer commute times have higher office vacancy rates compared to cities with shorter commute times, which highlights the appeal for many commuters to save time and money by working fewer days in the office.[50] Research has found that remote work has greater appeal for non-white workers. Black workers in knowledge fields are much less likely than white knowledge workers to want to return to the office full-time because hybrid and flexible work environments reduce Black workers need to code switch and their exposure to microaggressions and discrimination.[51] Studies have also found this to be true for women and other people of color and exemplifies how the traditional office workplace was designed by and for white men for the most part.[52] Downtowns and their office buildings need to focus on becoming more inclusive spaces to encourage a diverse workforce to come back to the office.

The physical office still shows value for working with others in-person, learning, and socializing, but continues to provide a less effective environment for collaborating virtually and solo work. If downtown offices hope to attract workers back, they must provide both quiet and creative group workspaces such as focus rooms and maker spaces.[53] Employees are also more willing to come into offices that offer informal workspace, enhanced experiences such as a work cafe or mediation space, and are in an amenity-rich part of the city. This may mean locating offices into mixed-use buildings rather than into traditional, standalone office buildings, and investing in amenities nearby such as grocery stores, outdoor spaces, and medical facilities.[54] Analysis of cell phone data has shown that employee attendance in vibrant neighborhoods –

those with myriad restaurants, experiential retail, etc. – has recovered three times as much as non-vibrant neighborhoods in the same cities.[55]

4. Consumer Behaviors

Several consumer trends signal positive opportunities for downtowns and belie "doom loop" scenarios. Primarily, while the pandemic and threat of inflation temporarily dampened spending, there are strong signs of continued "revenge" spending as rates return closer to pre-pandemic levels.[56] Much of this growth is driven by Baby Boomers, who are outspending all other generations on travel and dining.[57] These spending trends are supported by encouraging data that, overall, tourism and sectors of the downtown "nighttime economy" (particularly dining) are at or even exceeding pre-pandemic levels.[58]

The pandemic kicked off an unprecedented level of channel switching and brand loyalty disruption, with consumers on a quest for greater convenience and value.[59] Millennials and Gen Z continue to lead this disruption, with younger consumers strongly preferring brands and businesses reflective of their values, including environmental, social, and political issues.[60] The pandemic-driven focus on health and safety concerns accelerated this trend, with 73 percent of consumers reporting feeling more aware of environmental and social issues than they did pre-pandemic.[61] Additionally, demand for discounted and budget products continues to rise across all age demographics. Demand is greatest among Gen Z and Millennials who are most financially burdened by housing costs and student loans.[62]

Long overlooked and underserved, the purchasing power of consumers identifying as a race or ethnicity other than White will only become more influential, largely thanks to population growth. Research suggests that products and business models better catering to the needs and preferences of Black Americans alone could unlock up to $300 billion in spending, particularly in the areas of personal-care products/services, banking/financial services, healthcare, and food.[63] Downtowns that foster entrepreneurship among communities of color and work to ensure their commercial mix is appealing and welcoming to all will be best poised to capture this market opportunity.

Retail continues to be a highly disruptive industry. 50,000 US stores are likely to close by 2027 – meaning that $285 billion in retail sales will be "up for grabs."[64] Yet the data indicate these sales will not fully transfer to e-commerce, and online sales growth is expected to slow through 2030.[65] This is good news for brick-and-mortar retail and downtowns. Consumers continue to illustrate strong preference for shopping in physical stores that offer blended online/social media services ("omnidirectional"), valuing the immediacy, ability to see and try on products, and customer service experience.[66] The pandemic additionally emphasized the need to support local businesses -- this trend continues as consumers remain more loyal to local and/or smaller, independent businesses with strong brand identities.[67]

Store closures offer an opportunity for new businesses downtown that cater to these new "omnidirectional" preferences. This new type of store has a smaller footprint with more sales per square foot, lower labor demands, more limited inventory, and caters to more experiential merchandizing.[68] Downtowns' diverse building stock and smaller commercial spaces give them an advantage in attracting and fostering these successful new retail concepts.

However, retail will continue to face some fundamental challenges, including labor shortages, wage pressures, manufacturing costs, supply chain logistics, and lagging foot traffic. These pressures disproportionately burden the smaller, independent businesses that consumers are favoring. Downtowns that proactively support these businesses and help maintain retail clusters will remain the most competitive. In addition, downtowns will need to continue planning for access to warehousing/logistic hubs and curbside management to accommodate delivery activity.

5. Housing

The past ten years have seen the cost of housing become a top issue facing cities of all sizes across the nation. Decades of exclusionary zoning laws coupled with rising construction costs and local opposition to multifamily projects have led to an estimated shortfall of 3.8 million units.[69] Nationally, this housing shortage is projected to last through the end of the 2020s as rising interest rates coupled with supply and labor issues have led to a slowdown of construction.[70]

The shortfall is particularly dire for households at lower income levels which are disproportionately renters. In 2021, nearly one-third of all US households – over 40 million households in total – were cost burdened, meaning they spent more than 30 percent of their income on housing.[71] For renters, nearly half of all households were cost-burdened. The affordability gap will be exacerbated as an estimated 640,000 existing income restricted units age out of their restrictions through 2030.[72] Additionally, new affordable housing projects are some of the most vulnerable to ballooning costs and delays, leading the industry to predict a new affordable housing crash by 2025.[73] Downtowns may be among the areas hit hardest by the loss of affordable housing stock as analysis shows the highest concentrations of aging income restricted units exist in and near city centers.[74]

Downtowns are uniquely bearing the brunt of the housing crisis through the increase in numbers of people experiencing homelessness downtown.[75] In addition, lower wage workers essential to downtown economies, such as restaurant employees, are in particular danger of falling into homelessness in the coming years as the economy recovers.[76] It has become clear that downtowns have a vested interest in not only their immediate housing landscape but must be given a role in shaping broad strategies to address the housing crisis such as increasing allowed housing types and density throughout metro areas. At the same time, while "upzoning" is one of the solutions for the national housing shortage, its cooling effect on prices takes time and great care should be paid to near-term risks of displacement, gentrification, and further housing destabilization of the most vulnerable.

Despite the pandemic, demand for housing downtown has remained strong, with newer downtown residents trending younger and more affluent.[77] This demand is supported by shifts from large institutional investors away from office and towards large multifamily portfolios.[78] Downtowns are also leading the national trend towards rental-dominated markets, with urban cores containing the zip codes with fastest-growing renter populations.[79] Consequently, downtowns should expect to see renewed interest in rental-specific issues, such as tenant protections and rent control.[80]

In addition to new construction, office-to-housing conversions have increased by 25 percent since the onset of the pandemic.[81] However, this will not be a panacea as not all commercial buildings can be easily converted. Downtowns that want to get serious about conversions should partner with the construction/development sector to understand the unique barriers and opportunities in their context.

Downtowns will also need to work with their local governments to explore regulatory changes and public subsidies to facilitate conversions.

The pandemic loss of the traditional office ecosystem has only reaffirmed the vulnerability of single-sector downtowns and the necessity of reviving them as complete neighborhoods. Residents will drive new businesses but also require goods and services for everyday living, including grocery, childcare, education, and medical services. Downtowns that track and recruit these elements will be best positioned for this transition and care should also be given to street-level quality of life elements such as tree canopy, landscaping, and distribution of parks and open space. Additionally, this transformative moment presents downtowns with the opportunity to partner closely with surrounding neighborhoods to plan for thoughtful growth and policies that counteract displacement and historical city-building injustices.

DISRUPTION

6. Finding Community in a Polarized Age

Over the last 20 years, Americans have increasingly chosen to live in places that reflect their values. As a result, the United States has become more politically polarized by place, with the percentage of counties where a presidential candidate won 80 percent or more of the vote jumping from 6 percent in 2004 to 22 percent in 2020.[82] COVID-19 accelerated this trend by allowing more people to work remotely and prompting many conservative Americans to flee places with strict COVID-19 mandates to states with looser restrictions like Texas and Idaho. Some liberals, in contrast, are changing their career plans or turning down job offers in conservative states because of concerns about access to abortion and other policies.[83]

Studies find that Americans across the political spectrum share many of the same core values of equality, liberty, and progress.[84] But Americans don't trust each other, as many believe that those with different party affiliations don't share these same values.[85] Promoting conversations between Americans who wouldn't normally interact could be key to bridging the partisan divide as research has shown that intergroup contact can help build trust by increasing understanding of different perspectives.[86]

Furthermore, the Pandemic decreased human-to-human contact and community connection by accelerating a trend of Americans valuing friendship less and becoming lonelier.[87] Self-reporting isolation and social disconnection is increasing to the point where the US Surgeon General released an Advisory on America's "epidemic of loneliness and isolation."[88]

Downtowns have historically provided a place for just such intergroup contact, where people from diverse backgrounds mix and exchange ideas. Research finds that Americans living in very high amenity areas such as downtowns are twice as likely to regularly strike up a conversation with a community member they don't know well than Americans living in very low amenity areas. In addition, 68 percent of Americans who have a "third place" (a quasi-public gathering space, such as a coffee shop) say they feel close to their communities compared to 43 percent of Americans who don't have a third place.[89] Unfortunately, the pandemic prompted a retreat from public spaces and resulted in Americans being less likely to visit places in their cities that are economically different.[90] Investing in and reactivating downtowns as inclusive, "high amenity" centers could help rebuild trust and community cohesion across society.

However, the careful management of these spaces is critical. Planning that empowers and involves community members creates more buy-in and positive reception of redeveloping spaces.[91] Downtowns need to be careful when reinvesting in public space improvements not to leave out the historically under resourced neighborhoods that surround them. Downtowns can tie public space improvements to surrounding neighborhoods by increasing physical connectedness to adjacent neighborhoods, preserving open space, and revitalizing neighborhood commercial corridors. Creating programming and critical community infrastructure for historically underinvested communities can help mend social divisions both regionally and citywide.[92]

7. Public Health & Safety

While many aspects of life have regained a sense of normalcy, it's impossible to overstate the toll COVID-19 has had on public health and the safety and vitality of our downtowns. The pandemic disabled the fundamental advantages of downtowns as central gathering districts, and many markets remain slow to recover.

Several public health trends – related to mental health, gun violence, and the opioid crisis – were accelerated by the pandemic and will become increasingly impactful in 2023 and beyond. Many of these were growing challenges prior to the pandemic that have only been accelerated since. Mental health – a longstanding concern, but a stigmatized one that has largely bubbled under the surface – is now widely recognized as a crisis by American officials. One in five U.S. adults experience mental illness each year.[93] The U.S. experienced historically elevated levels of gun violence that surged during the pandemic.[94] Early data suggest overall levels are starting to decline again, however, this remains a unique challenge in America, and certain occurrences, such as active shooter incidents, have rapidly accelerated in the U.S. over the course of this century.[95] The opioid epidemic is another public health crisis that has taken centerstage. Overdose deaths, on a steady rise since the 1970s, spiked between 2018 and 2022, driven mostly by the increasing prevalence of fentanyl in the drug market.[96] An overarching end result of all these trends taken together is that the U.S. life expectancy is now at its lowest level since 1996 and significantly below that of other wealthy nations.[97]

America's homelessness crisis, driven by many economic, social, and political factors, is nonetheless intertwined with some of these public health challenges. Recent counts estimate more than 500,000 people experiencing homelessness in the United States, a number that has been increasing since 2017. The increase is primarily driven by a rise in the unsheltered homeless population. Downtowns are bearing the brunt of the unsheltered and chronic homelessness crisis, nowhere more so than California which is home to half of the nation's unsheltered population.[98] Tent cities, sidewalk and park encampments, and designated camp areas are highly visible symptoms of homelessness in many downtowns. Furthermore, increasing unsheltered rates correlate with the prevalence of escalated behavior, which is only more acutely felt when a place doesn't feel crowded with pedestrian activity.

The challenges downtowns face from these trends are two-fold: in addition to the real health and safety impacts, many downtowns struggle with the perception that they are unsafe, unclean, and uncomfortable. This has required many downtown management organizations to return to the fundamentals of clean and safe services. The pandemic revealed the importance of clean and safe teams maintaining a uniformed presence on our downtown streets. But this challenge also now permeates everything else many downtown organizations do, from marketing and communicating the real facts of what's happening downtown, to programming and activating public spaces, to advocacy at the local and regional level to address the root causes of these challenges, not just the symptoms.

8. Climate & Environment

As global warming nears the 2-degree Fahrenheit mark – the increase in global average surface temperature that has occurred since the pre-industrial era – climate change is already being felt through increasingly extreme, damaging, and deadly weather events.[99] However, climate concerns appear unlikely to cause mass migration away from the most vulnerable regions in the U.S. any time soon.[100] In fact, the housing crisis continues to fuel migration towards historically less expensive metros in Texas, Nevada, and Florida which are among some of the most vulnerable to extreme heat and other climate impacts[101]: the number of "very hot" days in the fastest growing metro areas, Las Vegas and Austin, increased by 115 percent and 553 percent respectively between 2010-2020.[102] Growing competition for housing coupled with climate threats will place unprecedented strain on city resources in these areas. The lowest income residents will bear the brunt of rising energy costs fueled by extreme heat. Heat related illness and death, particularly among the elderly, very young, and unsheltered, is expected to dramatically increase in these areas and will become a serious health crisis in many parts of the United States.[103]

Yet cities are not without resources to adapt and will continue to lead in actions to address climate change. A growing number of municipalities have appointed Chief Heat Officers to help cities adapt to rising temperatures. The new generations of city and downtown leaders, Millennials and Gen Z, express the greatest concern with and willingness to act on climate change of any age group and this generational concern for climate trumps traditional political divides.[104] The urgency of reinvesting in our city centers and growing in more compact ways has never been higher, as urban sprawl accelerates climate change, drives people into more wildfire- and flood-prone lands,[105] and even increases the risk of future pandemics.[106] [107]

The climate-resilient and livable city of the future will depend on permeable surfaces, greenery, and strategic building design to help manage both extreme heat and flooding.[108] While downtowns have limited surface area for large new parks, the next few years will see an increased focus on green infrastructure and smaller, more dispersed greenspaces integrated into public and private property. A growing number of cities are classifying trees as critical infrastructure, yet forestation efforts should be savvy to the species that can thrive in increasingly harsh and variable downtown climates.[109] The decommissioning of urban highways offers opportunities for significant greening and restoring justice to damaged communities, but must be pursued carefully to avoid gentrification and displacement.[110]

Projects such as these are buoyed by an unprecedented level of federal support for sustainable projects, including the Inflation Reduction Act and Bipartisan Infrastructure Bill.[111] This has come at a critical time as the vast majority of civic infrastructure is expected to age out of its useful life in the next ten years and extreme weather may even lead to the premature failure of newer systems.[112] While dire, this situation also presents opportunities for cities to transition to more energy efficient and resilient infrastructure now and avoid later economic damage.[113] Yet while the federal approach to climate has become friendlier in the current administration, climate continues to be a hyper-politicized issue and cities looking to regulate on these issues are coming into increasing conflict with their state governments.[114] Climate-related legal challenges, and their associated costs for cities, are expected to only increase in the coming years as different levels of government grapple with the authority to shape environmental and land use policy.[115]

9. Technology

In late 2022, a giant leap in the capabilities of generative AI took the world by storm. While this fast-changing technology has brought its share of concerns, it also presents exciting possibilities for cities and downtowns.[116] AI promises to transform the way we process and interact with information, dramatically improving workflows and increasing the accessibility of previously specialized technical tools and processes. While large, resource-rich organizations are likely to adopt AI-enabled services first, as costs fall these technologies may become game-changers for smaller cities and downtown organizations by vastly increasing their internal capacity across nearly all functions.[117] When applied to the "Smart City" model (the use of networked sensors and other real-time data sources to inform city management[118]), AI may vastly amplify the ability of downtowns to address challenges from congestion to urban heat island effect.[119]

The general public may also quickly come to expect AI-driven interactions, especially for website navigation and customer support.[120] Downtown organizations and their partners should be prepared to integrate AI in a meaningful, consumer-focused way into their public-facing digital platforms. AI-enhanced experiences may also help improve public participation in processes such as planning by adapting to user communication preferences and providing enhanced accessibility. And while bias in AI remains a concern, AI may also prove to be a powerful tool for identifying bias and improving equitable outcomes.[121]

At the same time, these technological advances intensify cybersecurity threats. Cities and downtown organizations, particularly larger ones, will face increasingly sophisticated phishing and cyber-attack attempts.[122] In response, enhanced staff training and security investments will be essential, not only for minimizing internal vulnerabilities but for building trust with customers and constituents.[123] In addition, in the rush to adopt new technologies like AI, organizations will need to carefully evaluate vendors' security practices as cyberattacks targeting victims through their supplier networks are expected to grow to nearly two-thirds of all incidents.[124]

As data gathering becomes more robust, so will calls for data transparency and debates about privacy. The global adoption of surveillance technologies in cities and downtowns continues to skyrocket[125] and is rapidly expanding to smaller communities.[126] Surveillance and enforcement, including new "predictive policing" tools, disproportionately target people of color[127] and will increasingly blur the boundaries between public and private security actors.[128] Downtowns looking to implement these tools should prepare for increasing public scrutiny and carefully weigh the costs and benefits, including the possible impact on community relationships and trust.

Electrification technologies are having a moment and continue to transform our mobility preferences, the types of vehicles on the road, and transportation infrastructure needs. Federal investments such as tax credits for electric vehicles, funding for charging infrastructure, and subsidies for EV manufacturing have combined with advancements in technology, increased competition, and a rising supply to make electric vehicles more practical and affordable.[129] By 2030 there could be around 29 million electric vehicles driving on US roads, making up 40 percent of total passenger vehicles sales.[130] Downtowns should lead by example by electrifying shuttles and circulator buses, replacing downtown management organizations fleets with electric vehicles, requiring new buildings to be EV ready, and taking advantage of federal funding to build more charging stations.

At the same time, downtowns must continue to prioritize travel modes other than automobiles. As technology improved and battery prices fell, e-bike sales in the US jumped from $240.1 million in 2019 to $888.5 million in 2022. While electric vehicle sales continue to rise, e-bikes remain a cheaper and greener alternative and continue to have greater sales, with 1.1 million e-bikes sold in 2022 versus 809 thousand electric vehicles.[131] The rising popularity of e-bikes is already shifting many drivers towards making trips with an e-bike, which has the potential to reshape urban cores away from automobile infrastructure. Yet e-bikes pose their own challenges. They are more dangerous than traditional bicycles because of their increased weight and speed, and some models can go up to 55 mph if their safety equipment is removed.[132] Cities must allocate more space in the right of way and build new infrastructure to catch up with the increased volume and safety implications of people using e-bikes.

10. Growing Inequity & Inequality

Income inequality remains at its highest point in the post-WWII era. The top one percent of earners take home 21 percent of all income in the US and make an average annual income of $1.3 million compared to $50 thousand for the bottom 99 percent.[133] Pandemic era benefits and the resulting labor shortage offered a respite for low-income workers by pushing up wages low-income earners and ending poverty for millions. According to the Urban Institute, the American Rescue Plan Act reduced the poverty rate from 13.9 percent in 2018 to 7.7 percent in 2021, and stimulus checks alone kept an estimated 12.4 million people out of poverty.[134] The government's sweeping response to the pandemic was a reason why the recent recession was the shortest on record, at just two quarters, and is an argument for the economic benefits of increased social spending.[135] Unfortunately, the termination of benefits and the rising costs of living may erase these gains.[136]

Inequality is especially pronounced along racial and ethnic lines. In 2022, the average white family had $1.3 million in net worth while the average Hispanic family had $323 thousand and the average Black family had $340 thousand.[137] White Americans make up 60 percent of the population but hold 84 percent of total US wealth, while Black Americans make up 13 percent of the population but hold only four percent of wealth.[138] This is a racial wealth gap of $10.14 trillion.[139] The economic gaps between white and Black Americans also show up in indicators like unemployment, higher education, income, and homeownership.[140]

This persistent racial and ethnic wealth gap means that lower income residents of many downtown-adjacent neighborhoods are highly vulnerable to displacement,[141] and US cities continue to become more inequitable as gentrification threatens cultural erasure in these historic neighborhoods. Research has found that growing cities in the US produce more inequality as income increases quickly for top earners but doesn't increase fast enough for low earners to offset rising housing costs.[142] This vulnerability is highly dependent on cost of housing, as cities that have more housing supply and less strict regulations around building new housing struggle less with cost of living and homelessness.[143]

At the same time, the arrival of wealthier families into historically segregated neighborhoods can increase access to opportunity for all residents[144] and create new economic activity and tax revenue.[145] A study of Chicago found that segregation cost the city $4.4 billion annually, and the city's economy could produce $8 billion more if it reduced its segregation to the national average.[146] Friendships across socioeconomic ties can help bridge income gaps and create upward mobility, especially for children with low socioeconomic status, and cities with more diverse neighborhoods have greater civic cohesion.[147] Downtowns could foster these relationships and offset the negative effects of growth by cultivating economically and racially mixed neighborhoods and building affordable mixed income housing. A bottom-up approach to economic development would lift the economic status of low-income neighborhoods through grants and other assistance programs to entrepreneurs and small business owners.[148]

Combatting inequality continues to be a strong value among many of downtowns' stakeholders, recently amplified by awareness of the disproportionate impact of COVID-19 on people of color[149] and the Black Lives Matter movement.[150] Young people especially have become more outspoken about their values: Gen Z is more likely than older generations to boycott a company based on social or environmental grounds, less likely to work for a company that doesn't reflect their values, and 70 percent are involved in a social and political cause. Companies have responded by increasing their focus on diversity, equity, inclusion, and belonging. Money spent on DEIB efforts are projected to double from $7.5 billion today, to $15.4 billion by 2026.[151] Research has also shown that diverse companies have 2.3 times higher cash flow per employee, with inclusive teams showing 30 percent increases in performance.[152] Downtown organizations should be leaders in promoting diversity, equity, inclusion, and belonging internally and externally to create a better environment for people of all backgrounds, and to improve their performance and delivery of services.

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