



# State of the Downtown Report

Ann Arbor, Michigan

2023 Year in Review

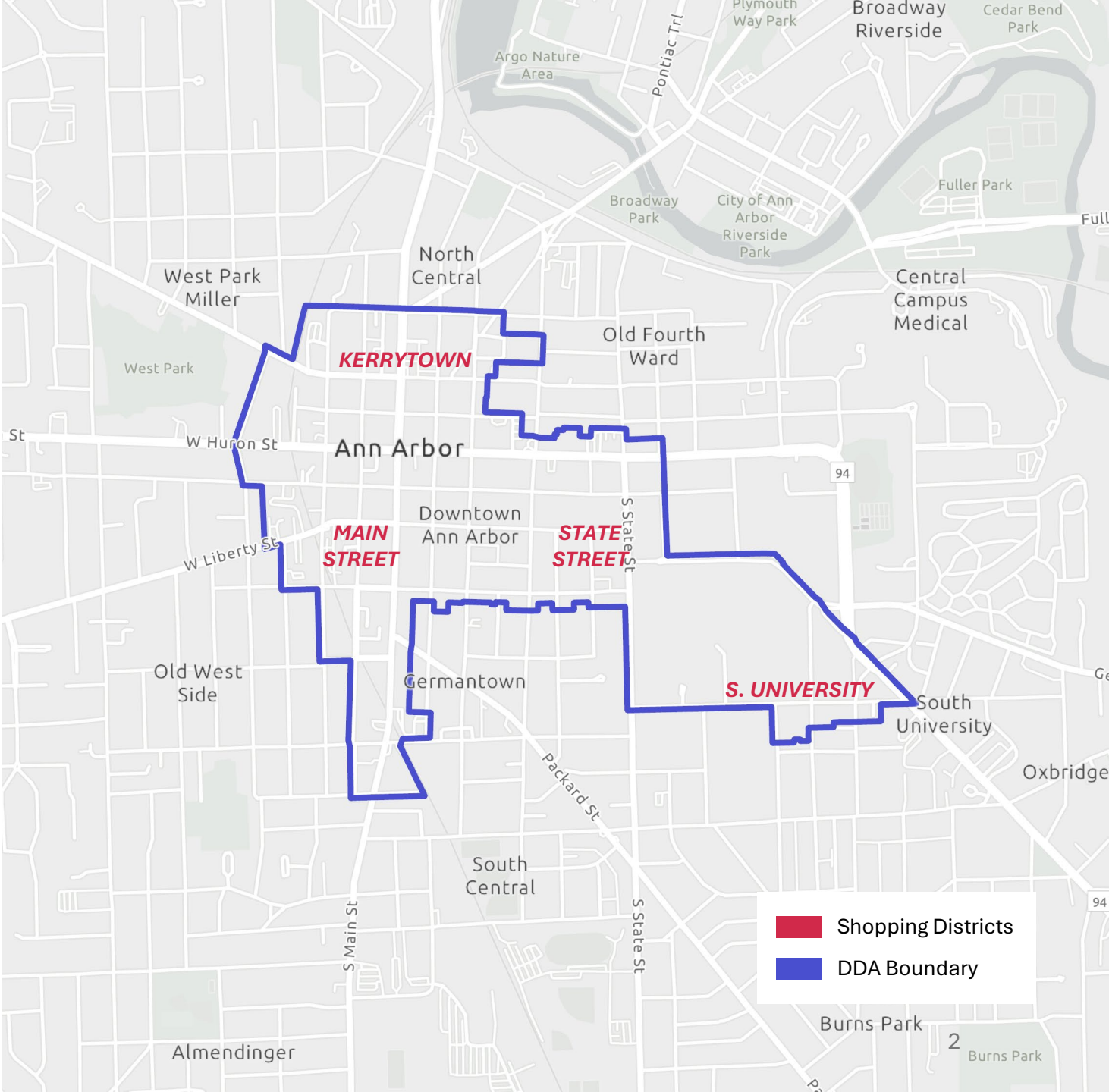


# About Downtown

Downtown Development Authorities (DDAs) were created by the State of Michigan as a tool to counteract central city decline and ensure that the heart of our cities and regions receive careful stewardship consideration.

The Ann Arbor DDA district's borders were defined in 1982 when the DDA was created. Since its inception, the DDA has worked continuously to meet its mission: *to undertake public improvements that have the greatest impact in strengthening the downtown area and attracting private investments.*

|   |                        |
|---|------------------------|
| Total Area:                             | 271 Acres<br>67 Blocks |
| Public Right of Way (Streets & Alleys): | 80 Acres               |



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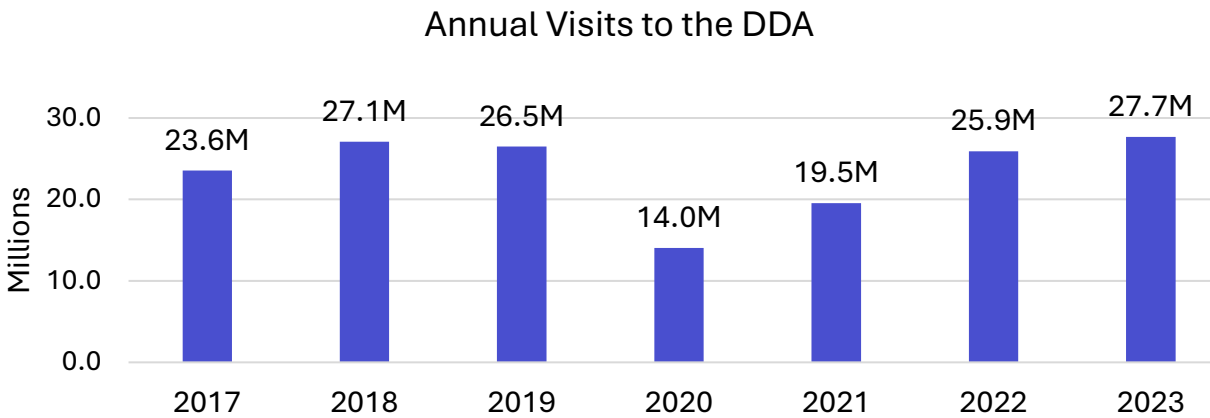
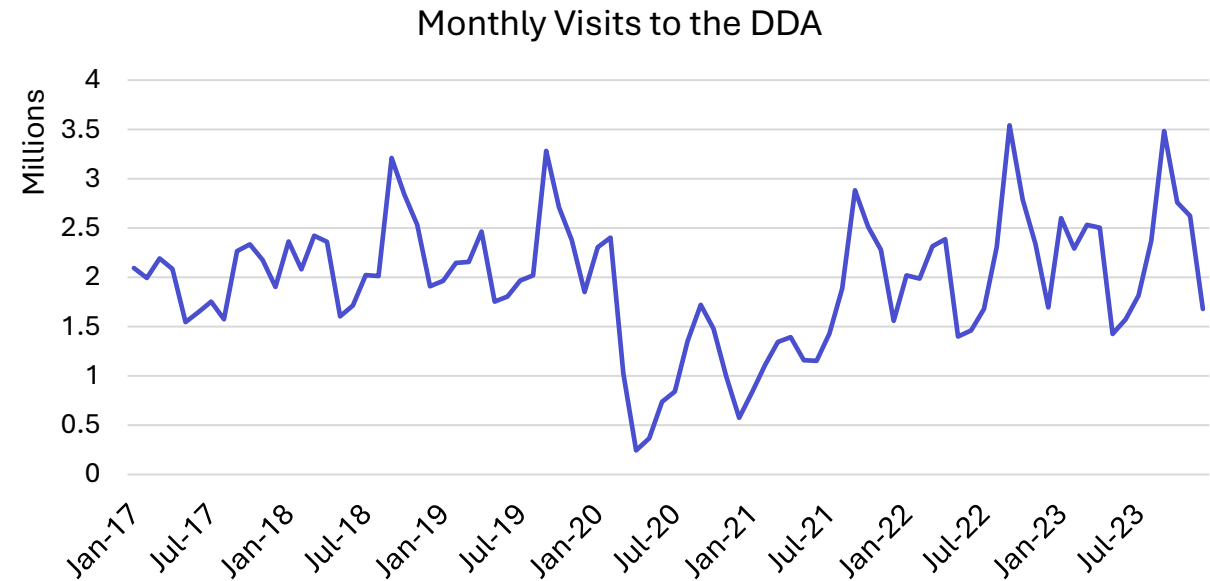
# Activity Trends



# Visits to Downtown: 2017-2023

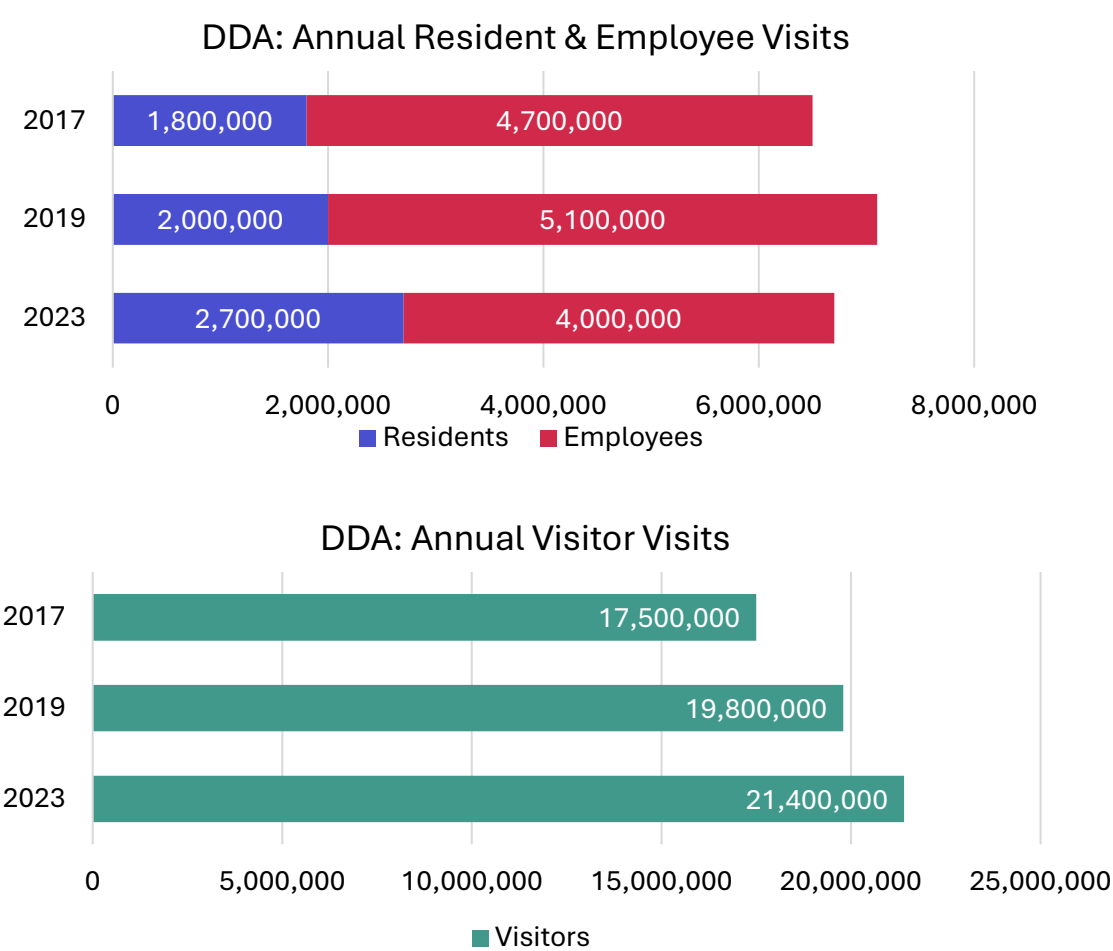
Post-pandemic, the downtown appears more sensitive to U-M's schedule without as many office workers present to help buoy activity when U-M is not in session.

Source: Placer.ai. Data retrieved Summer 2024. Data includes visitor, employee, and resident visits.



# Visits to Downtown: 2017 - 2023

Employees, Residents, & Visitors



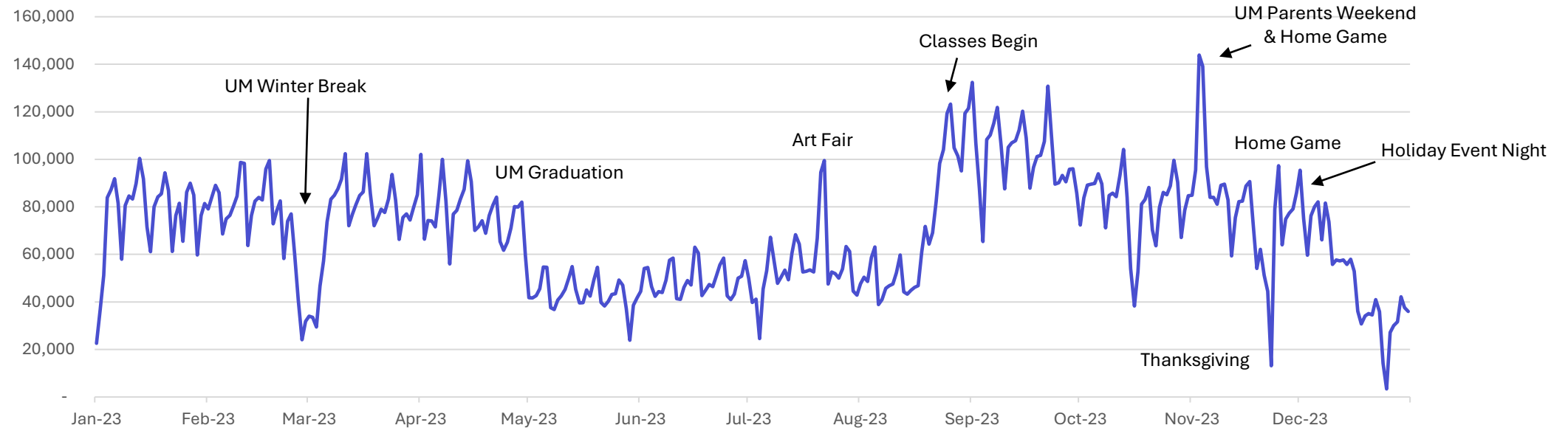
| Change in Visits by Type: 2019 - 2023 |       |      |
|---------------------------------------|-------|------|
|                                       | #     | %    |
| Resident Visits                       | +700K | +34% |
| Employee Visits                       | -1.1M | -21% |
| Visitor Visits                        | +1.5M | +8%  |

Resident activity continues to increase as employee visits decrease.

Source: Placer.ai. Data retrieved Summer 2024.

# 2023 Visit Trends

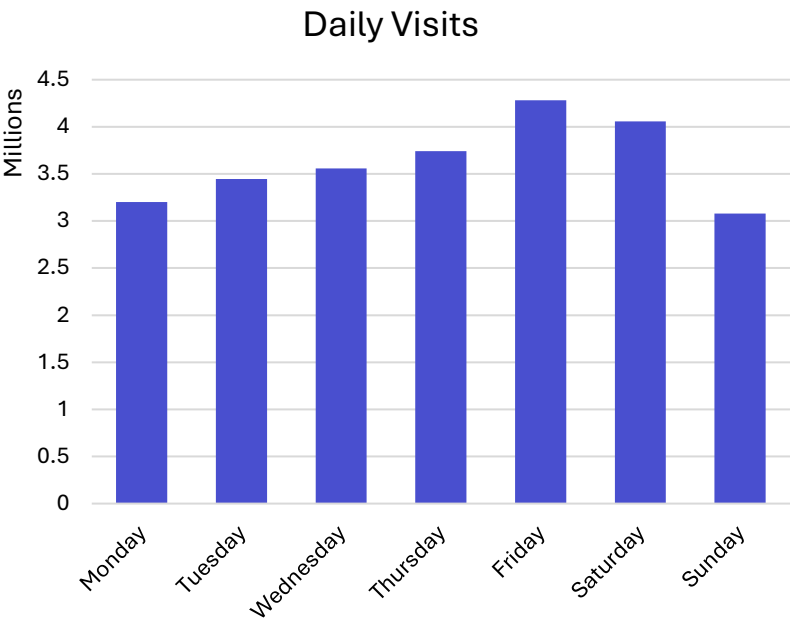
## Visitors & Employees



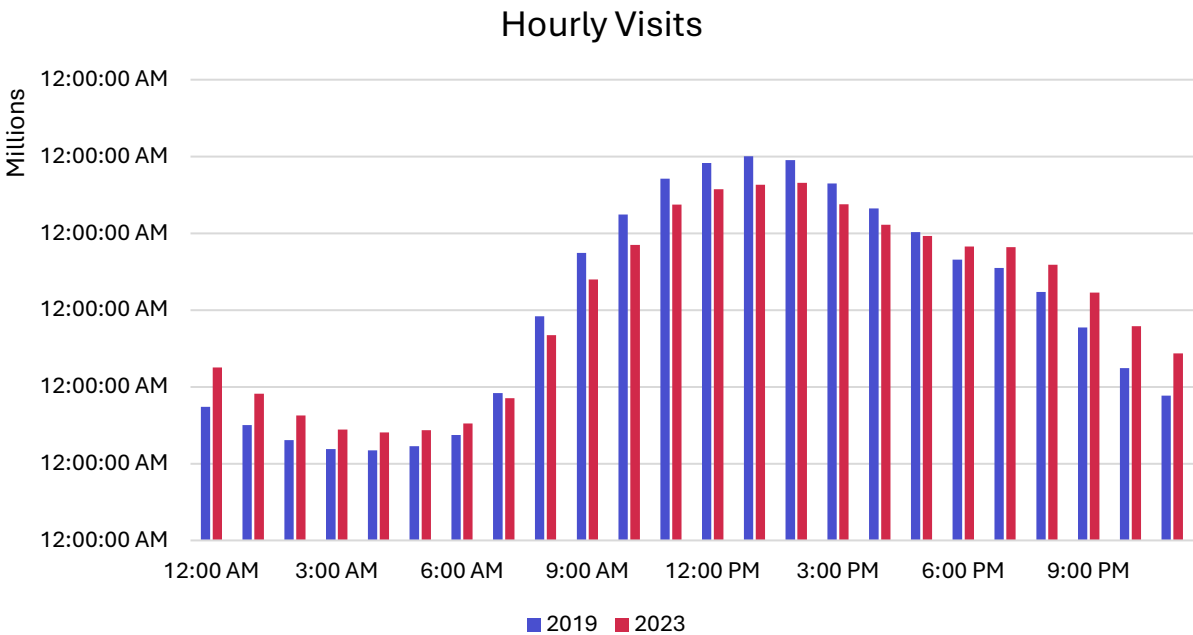
Generally, activity downtown follows campus activity and UM football.  
Weekly activity tends to peak on Saturdays.

# Daily & Hourly Visits

Visitors & Employees



Downtown is busiest on Fridays (16.9%) and Saturdays (16.0%)

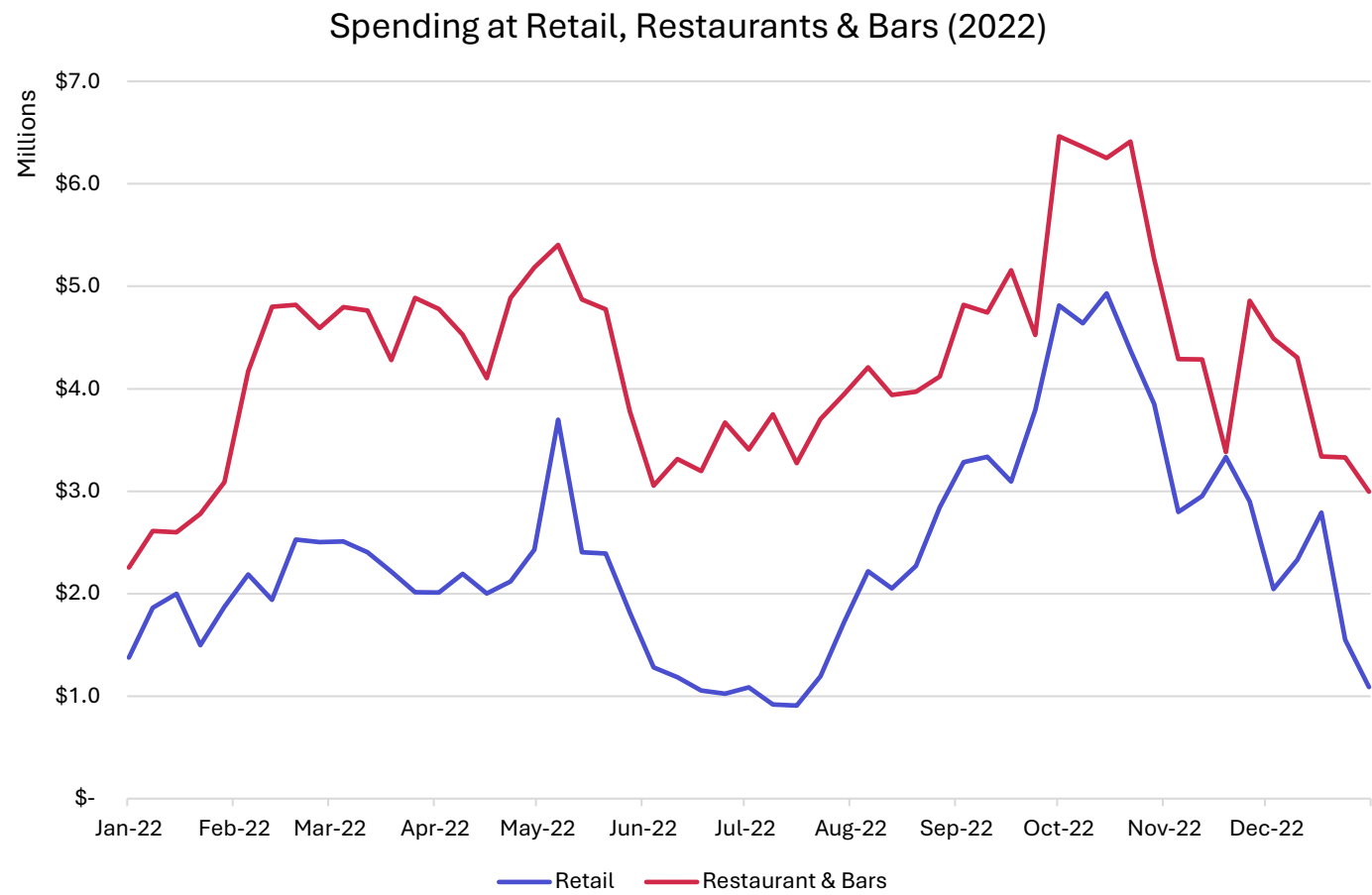


Activity has shifted toward the evening. Visits for visitors and employees between 4PM – 2AM grew 10.4% between 2019 and 2023.

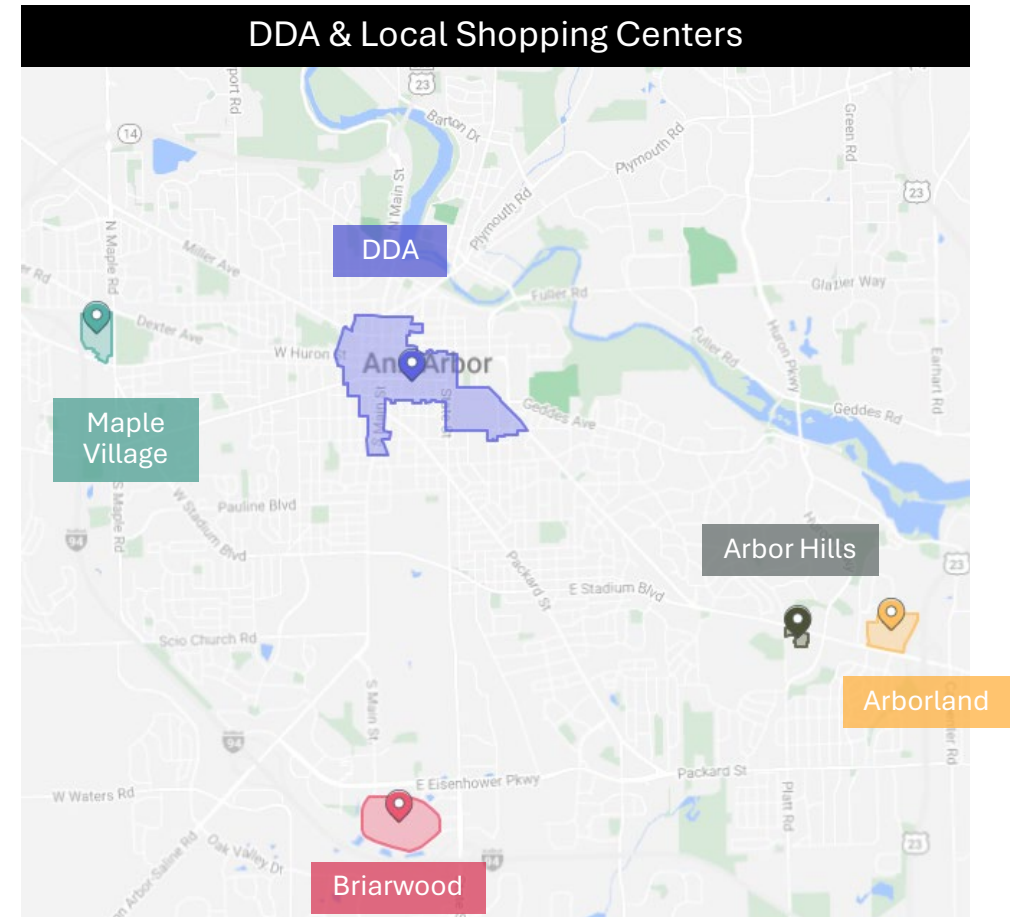
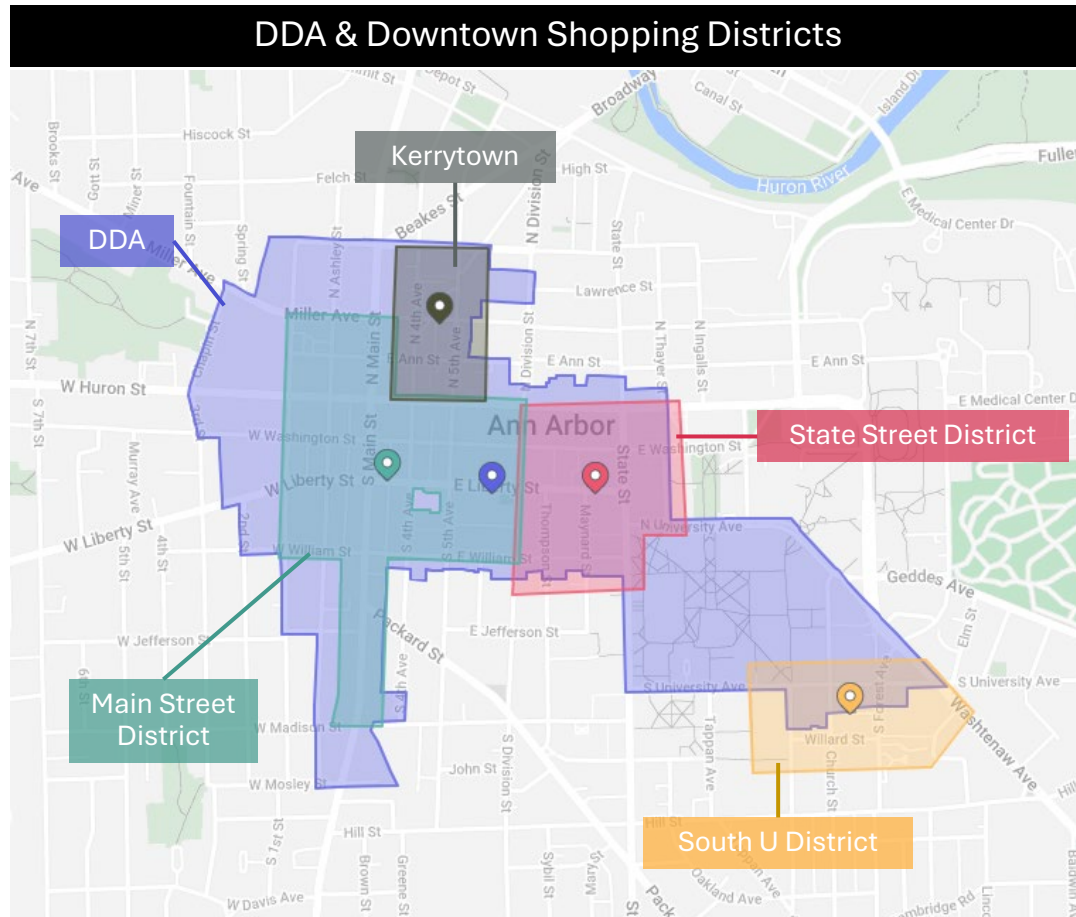
# 2022 Spending

Spending on shopping and dining generally trends with visit activity.

Source: Replica. Data retrieved Summer 2024. Note that 2022 is the most recent data available.



# Shopping Area Trends

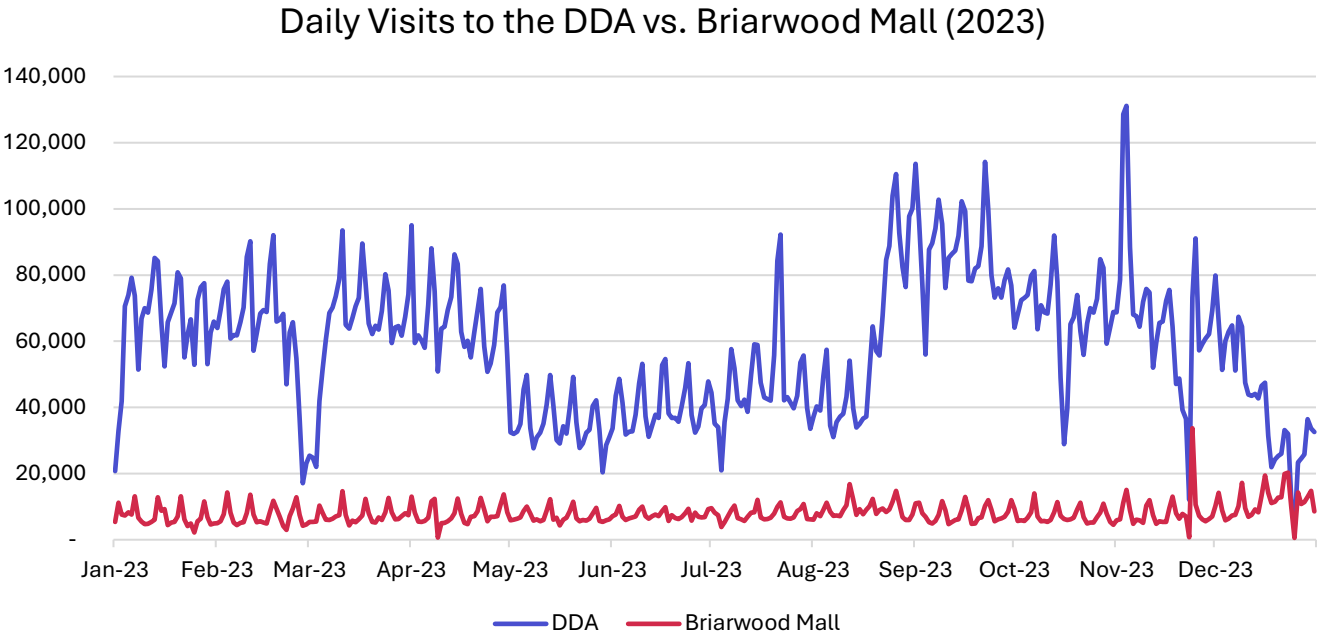


# DDA vs. Briarwood Mall

## 2023

- In 2023, activity in the DDA greatly surpassed activity at Briarwood Mall
- Visits to the DDA in 2023 exceeded pre-pandemic levels, while visits to Briarwood significantly declined.

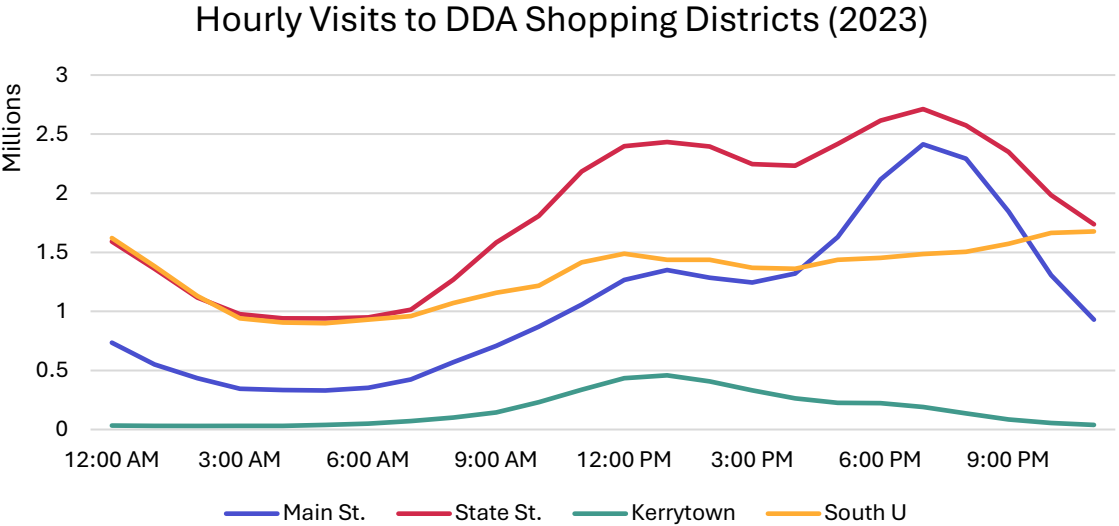
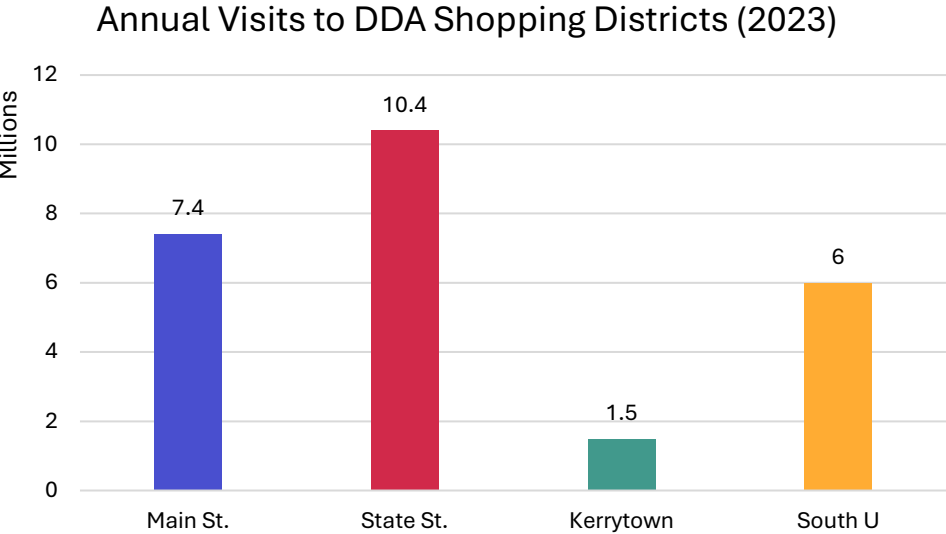
Source: Placer.ai. Data retrieved Summer 2024. Data includes visitor visits.



|                | Visits |      | Change in Visits: 2019 vs. 2023 |      |
|----------------|--------|------|---------------------------------|------|
|                | 2019   | 2023 | #                               | %    |
| DDA            | 19.8M  | 21.4 | +1.5M                           | +8%  |
| Briarwood Mall | 4M     | 2.9M | -1.1M                           | -28% |

# DDA Shopping Districts

## 2023



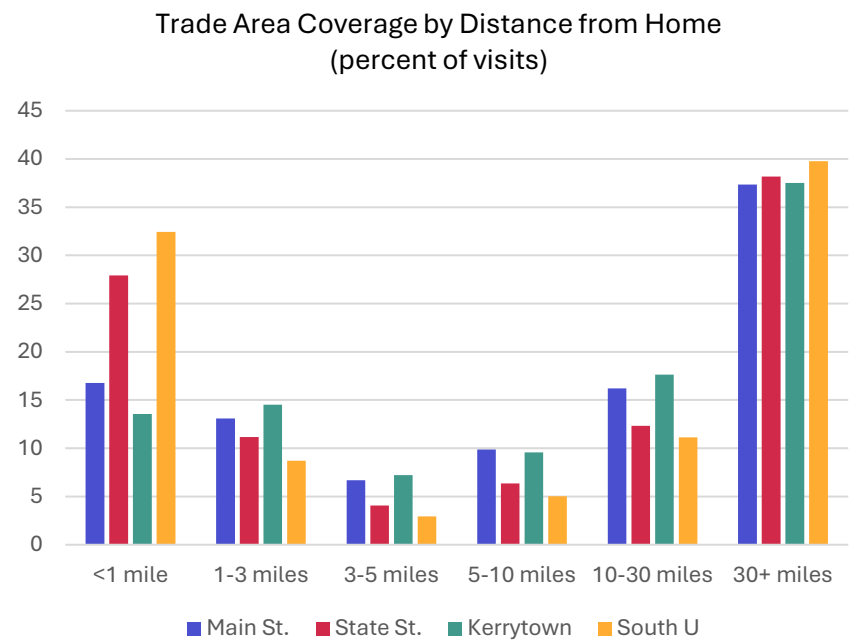
| Average Visitors Per Day (2023) |             |              |           |         |
|---------------------------------|-------------|--------------|-----------|---------|
|                                 | Main Street | State Street | Kerrytown | South U |
| Monday - Wednesday              | 5,996       | 10,059       | 1,181     | 6,246   |
| Thursday - Sunday               | 14,270      | 18,342       | 2,730     | 10,058  |

Peaks in activity vary by neighborhood. The State Street District has relatively consistent visits throughout the day, which makes sense given its proximity to the U-M campus. Activity around South University Ave., which also borders campus, is steady throughout the day and peaks from 9 PM – 1 AM. Kerrytown activity peaks between 10 AM and 3 PM. Most visits to the Main Street District occur between 5 PM and 10 PM.

Source: Placer.ai. Data retrieved Summer 2024. Data includes visitor visits.

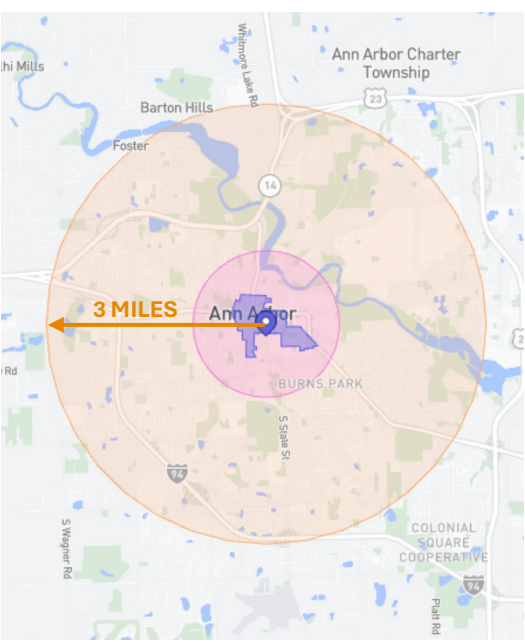
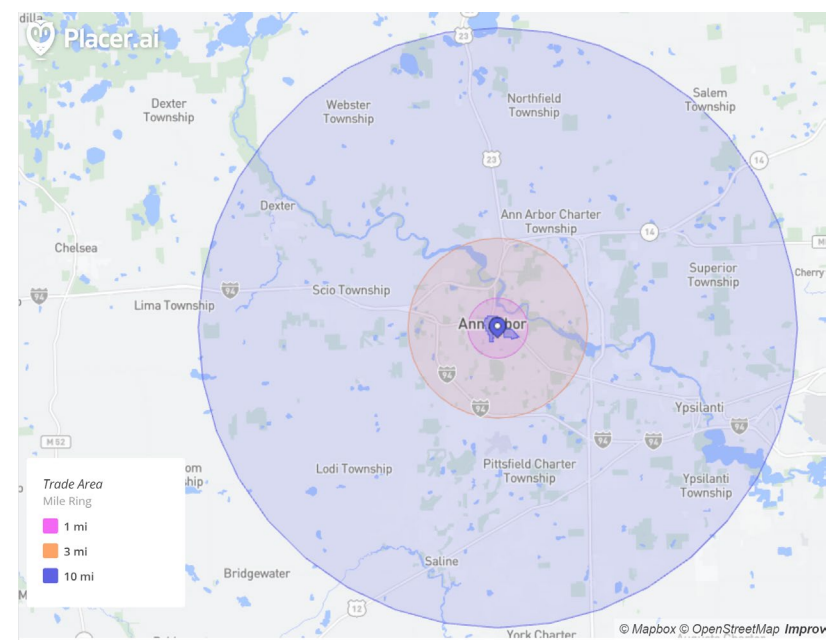
# DDA Shopping Districts: Visits by Distance from Home

2023



Overall, South University and State Street neighborhoods trade areas are smaller (customer base is closer) and draw more from what we think of as campus areas. Main Street and Kerrytown may be more regional destinations.

Source: Placer.ai. Data retrieved Summer 2024. Data includes visitor visits.



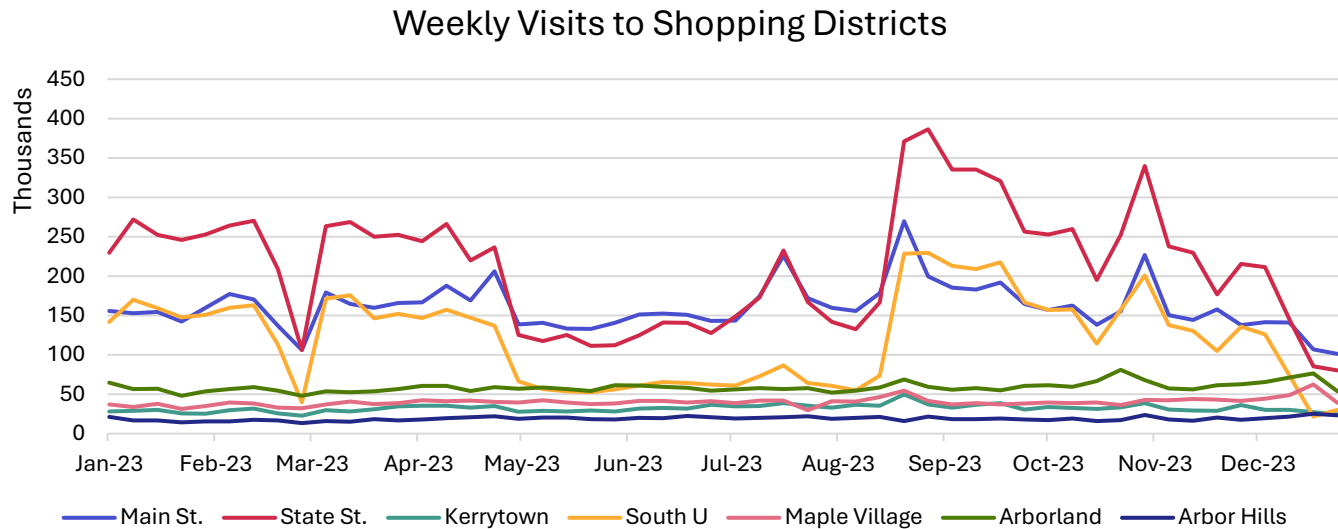
|                | Main St. | State St. | Kerrytown | South U |
|----------------|----------|-----------|-----------|---------|
| Under 1 mile   | 17%      | 28%       | 14%       | 32%     |
| Under 3 miles  | 30%      | 39%       | 28%       | 41%     |
| Under 10 miles | 46%      | 50%       | 45%       | 49%     |

A typical 3-mile trip takes...



# Shopping Districts: Inside vs. Outside DDA

2023



- In 2023, overall visits to shopping districts inside downtown exceeded visits to shopping destinations outside of downtown.
- Visits to 3 of 4 downtown shopping districts have increased since 2019.
- Visits to 2 of 3 shopping destinations outside of downtown have increased since 2019.

|               |          | Inside DDA  |              |           |         |             | Outside DDA   |           |             |              |
|---------------|----------|-------------|--------------|-----------|---------|-------------|---------------|-----------|-------------|--------------|
|               |          | Main Street | State Street | Kerrytown | South U | Combined    | Maple Village | Arborland | Arbor Hills | Combined     |
| 2019 vs. 2023 | % Change | +8%         | +14%         | -7%       | +28%    | <b>+14%</b> | +12%          | -6%       | +15%        | <b>+2%</b>   |
|               | # Change | +570K       | +1.3M        | -120K     | +1.3M   | <b>+3M</b>  | +240K         | -230K     | +140K       | <b>+150K</b> |

# Demographic Snapshots



# DDA Residents

## 2023

### DDA Resident Quick Facts (2023)

Population 12,200

+ 2,600 since 2019

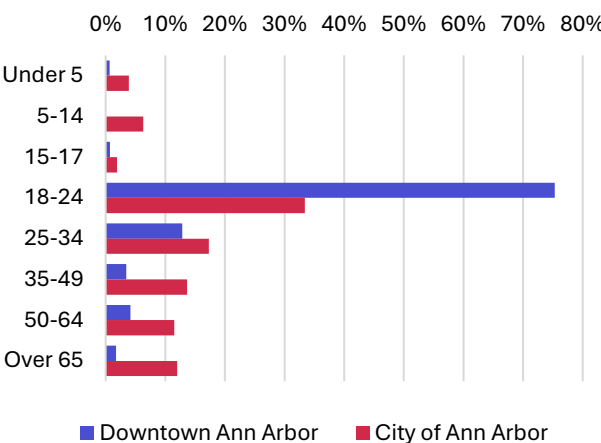
Population Density (per sq. mile) 29,048

DDA Median Age 20.6

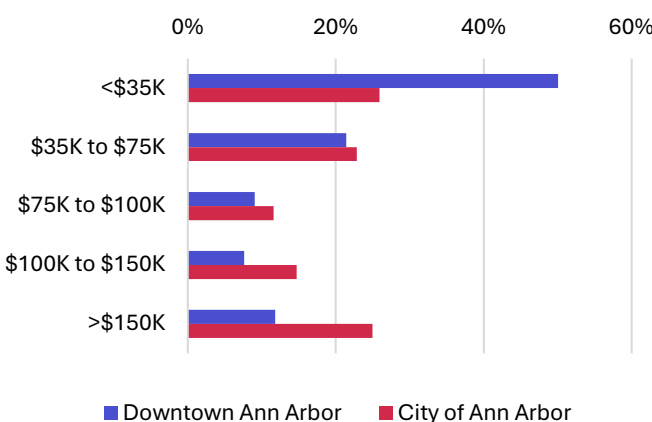
City Median Age 26.72

- The downtown population has increased since 2019.
- The age of downtown residents skews younger compared to the city as a whole.

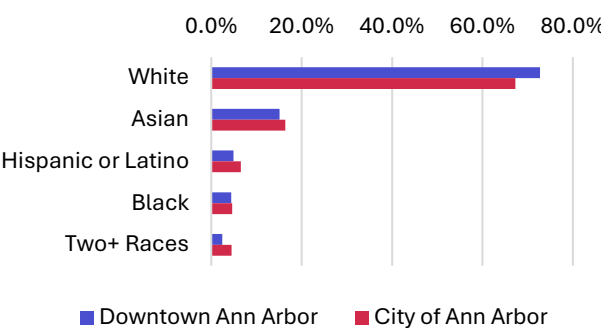
### Age



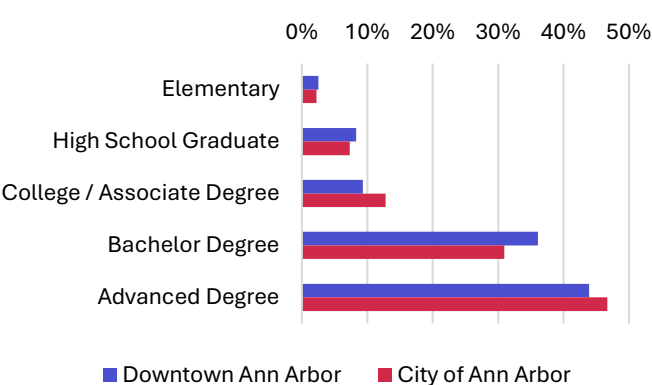
### Household Income



### Ethnicity\*



### Education



\*Less than 1% of the resident population identifies as American Indian, Alaska Native, Native Hawaiian, Pacific Islander, or Other.

# DDA Employees

## DDA Employee Quick Facts

Downtown Jobs (2021)\* 11,865  
-2,360 since 2019

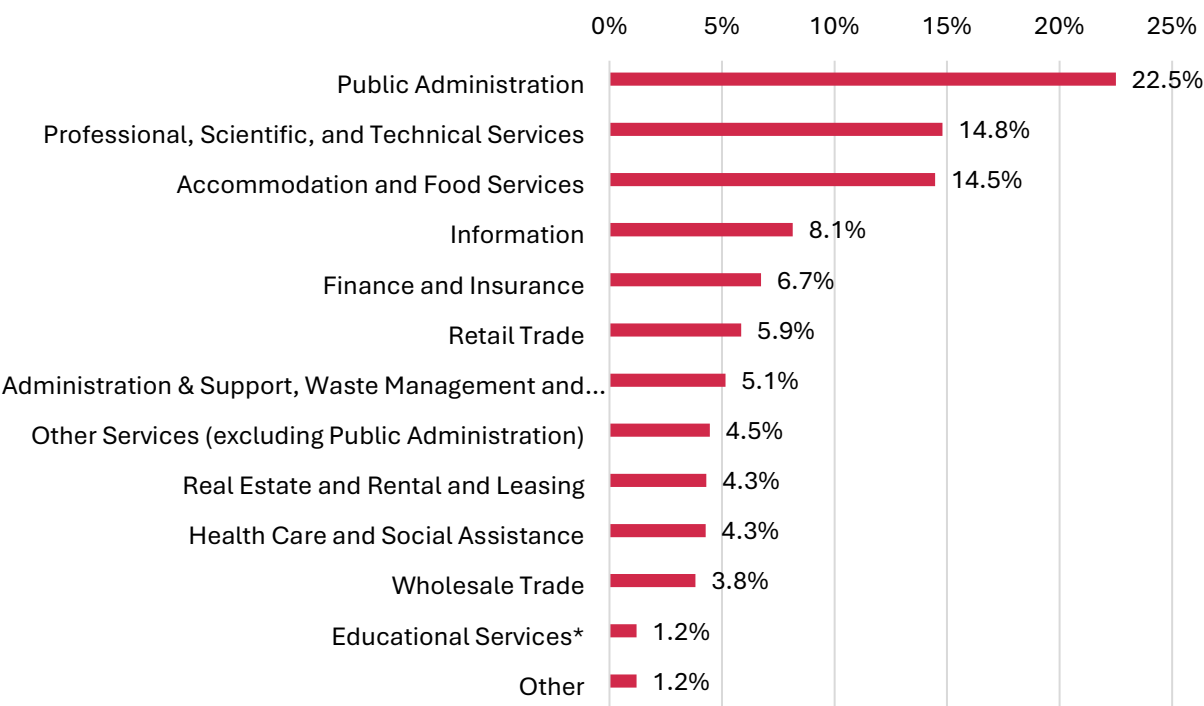
University of Michigan Central  
Campus Staff (2023) 16,960

*\*The most recent employment data available from the U.S. Census  
OnTheMap tool is from 2021.*

- The number of people working downtown has decreased since 2019.
- 99% of people employed in the DDA live outside the DDA (data does not include U-Mich staff).

## Employees by Industry

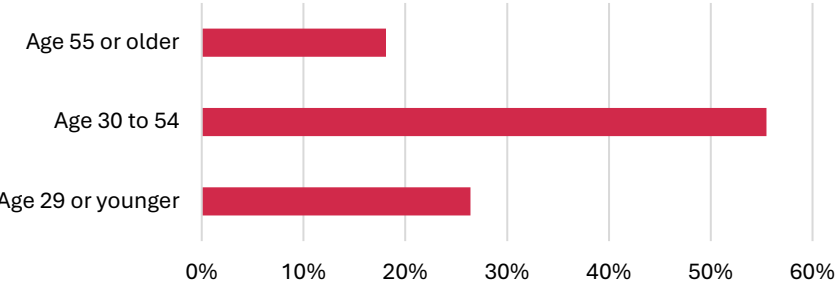
OnTheMap (2021)



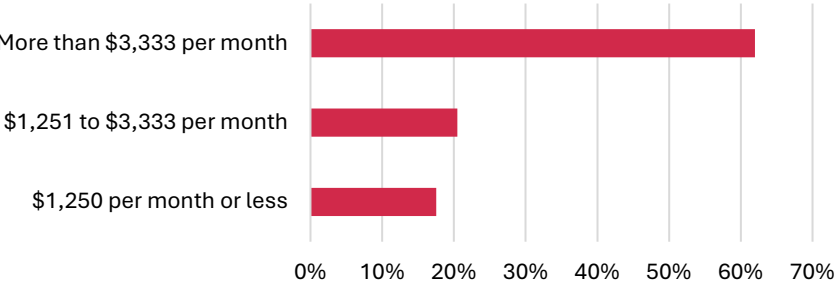
*\*Educational Service jobs within the DDA are likely undercounted  
due to the address associated with U-Mich employees.*

# DDA Employees

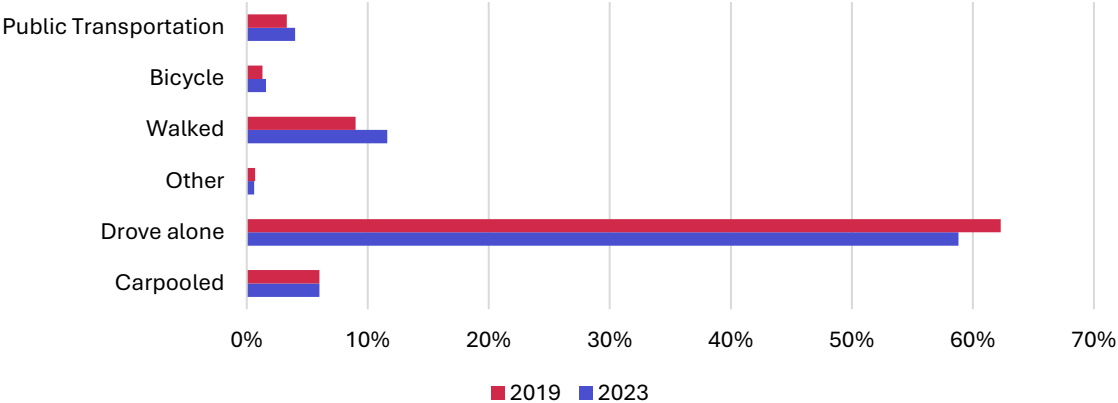
Worker Age  
OnTheMap (2021)



Job Earnings  
OnTheMap (2021)



Downtown Employees: Transport to Work  
Placer.ai (2019-2023)

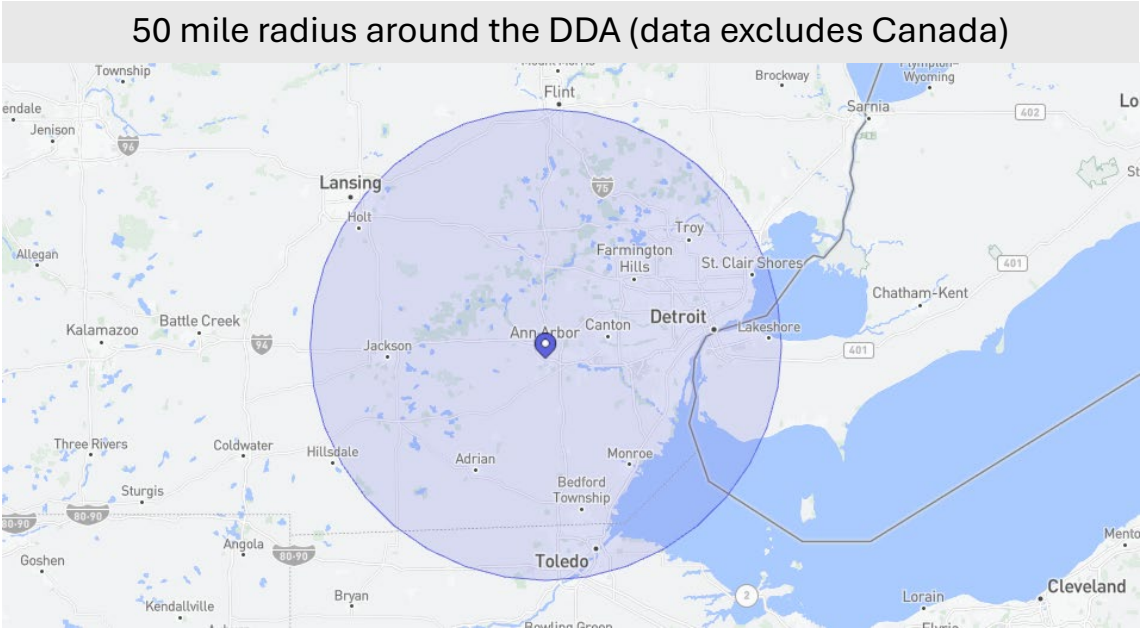


- The number of downtown employees who bike, walk, or take public transit has increased since 2019. The number of employees who drive alone has decreased slightly.
- Downtown employees biked to work at a rate 256% greater than the national average.
- The majority of people employed in the DDA are between the ages 30 to 54.

Source: U.S. Census OnTheMap; Placer.ai. Data retrieved Fall 2024.

# DDA Visitors

2023 – From within 50 miles



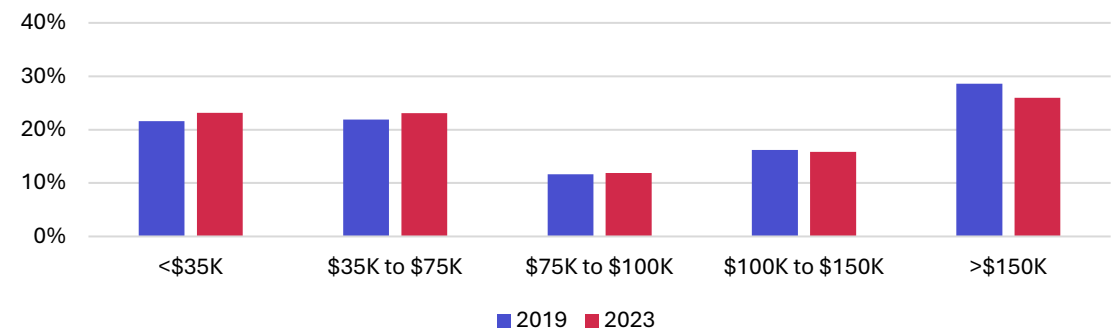
## DDA Visitor Lifestyle Groups\*

|  |     |
|--|-----|
| Young Singles & Starter Families Living a City Lifestyle | 30% |
| Mid- to High-Income Established Suburban Households      | 28% |
| Very High-Income Households                              | 23% |
| Mid- to Low-Income Households                            | 6%  |
| Retirees   | 5%  |
| Established Singles Living a City Lifestyle              | 5%  |
| Child-Centered Families                                  | 3%  |

\*Categories adapted from Experian: Mosaic lifestyle groups

- Young singles, starter families, and high-income households make up a large portion of downtown visitors. Child-centered families make up only 3% of visitors.
- From 2019 to 2023, visitors from high-income households slightly decreased, while visitors from low to mid-income households increased.

## Visitor Household Income

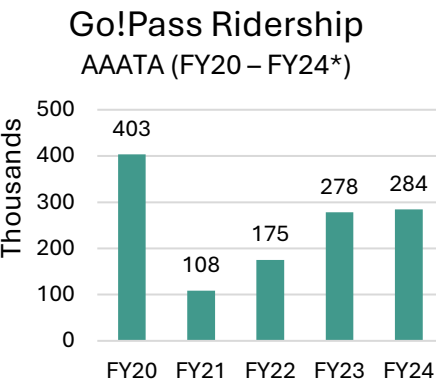
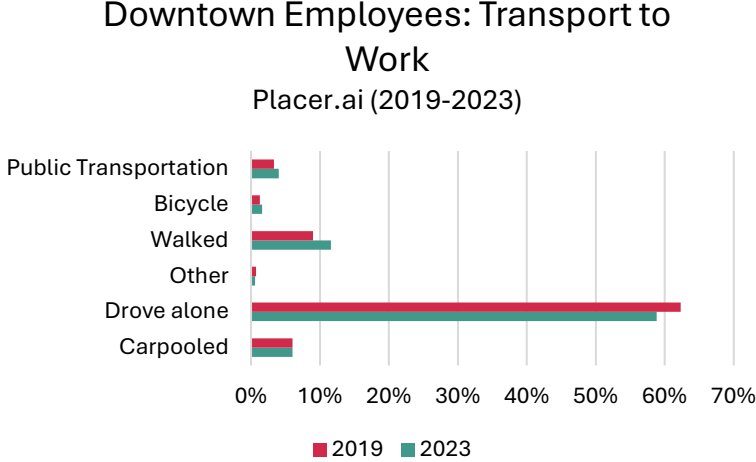
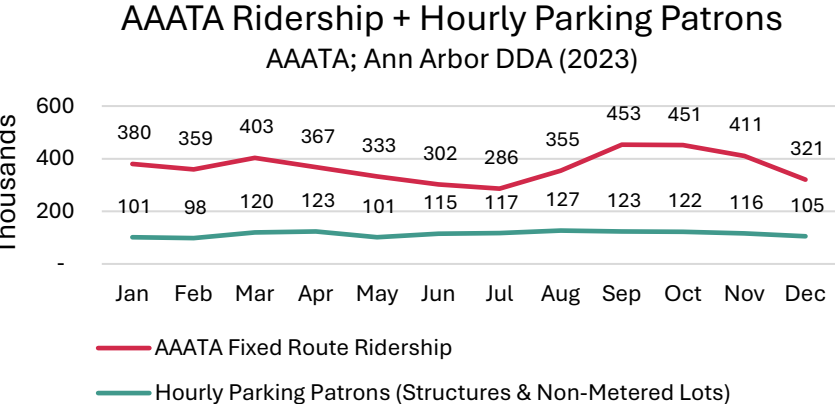


Source: Placer.ai. Data retrieved Summer 2024.

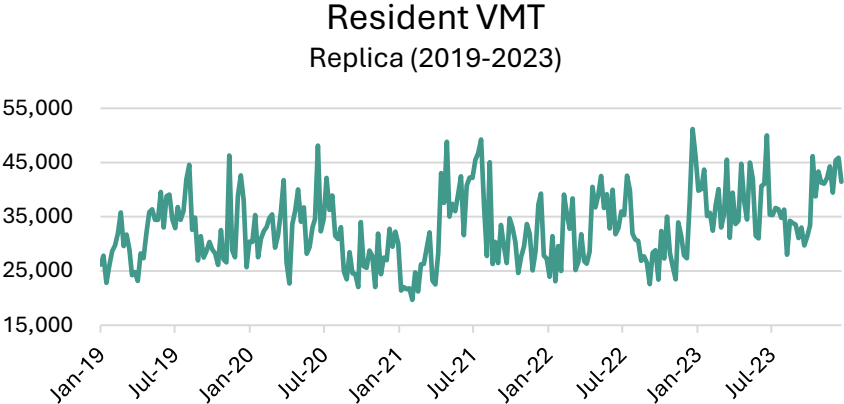
# Mobility Trends



# Mobility: Public Transit and Vehicles



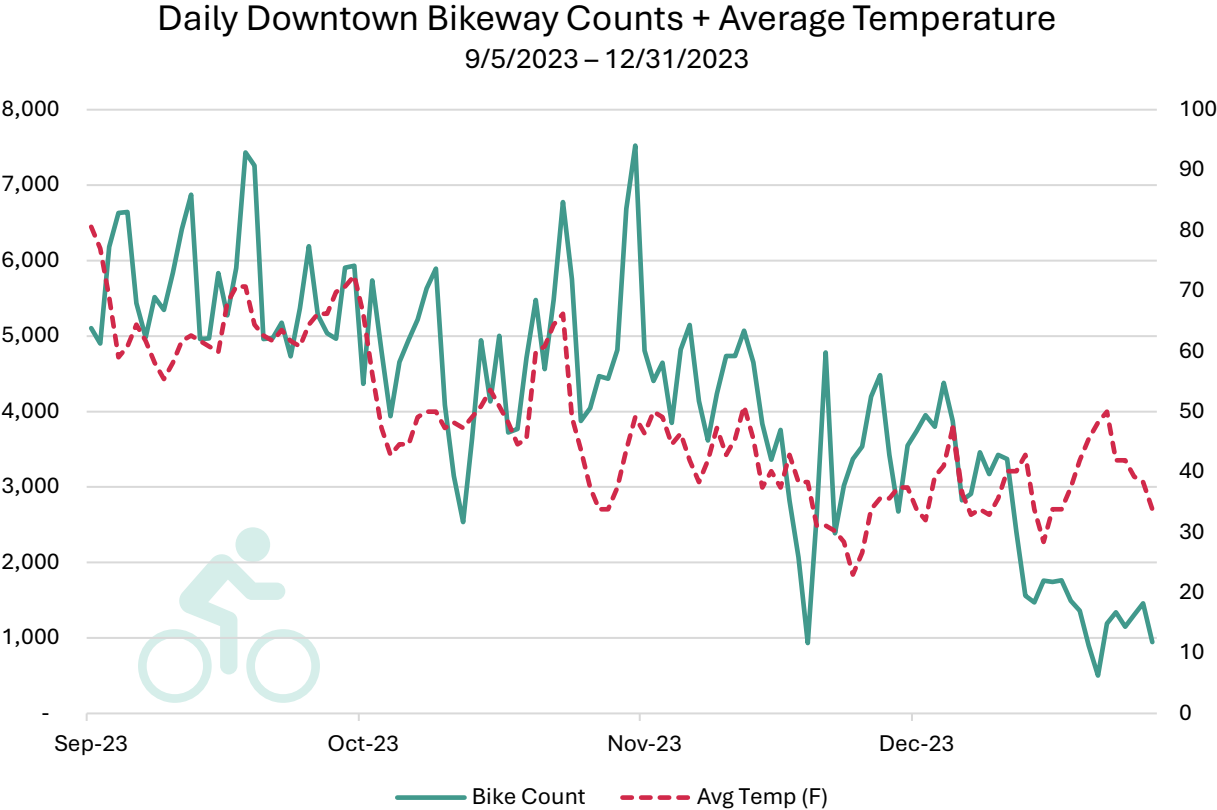
*\*The AAATA fiscal year begins in October and ends in September.*



- In 2023, AAATA ridership on fixed routes peaked in September and October. The number of hourly parking patrons at DDA lots and structures remained relatively steady throughout the year.
- Go!Pass is a DDA-funded program that subsidizes public transit passes for downtown employees. Usage of the pass has not recovered to pre-pandemic levels.
- Resident VMT, which represents the number of vehicle miles traveled by people who live within the DDA, appears to vary widely from week to week, but has a slight upward trend since 2019. However, the chart does not show per capita data, so population growth may be a contributing factor.

Source: AAATA; Ann Arbor DDA; Placer.ai; Replica. Data retrieved Summer 2024.

# Mobility: Biking



*\*2023 data includes counts from three segments of the Downtown Bikeway: William St., S Division St., and Catherine St.*

## Bikeway Count Quick Facts

|                               |        |
|-------------------------------|--------|
| 2023 Daily Median Bike Count* | 829    |
| 2023 Total Monthly Counts     |        |
| September                     | 39,173 |
| October                       | 32,696 |
| November                      | 20,802 |
| December                      | 10,453 |

- If 829 cyclists parked in the parking structures, they would fill every space in the Maynard structure (799 spaces) or fill the Fourth & Washington structure (280 spaces) nearly three times.
- Bike counters were installed at different sections of the Downtown Bikeway in Fall 2023. More count data is available at [a2dda.eco-counter.com](https://a2dda.eco-counter.com)