

STATE OF THE CITIES 2021



About the National League of Cities

The National League of Cities (NLC) is the voice of America's cities, towns and villages, representing more than 200 million people. NLC works to strengthen local leadership, influence Federal policy and drive innovative solutions. NLC's Center for City Solutions provides research and analysis on key topics and trends important to cities, creative solutions to improve the quality of life in communities, inspiration and ideas for local officials to use in tackling tough issues, and opportunities for city leaders to connect with peers, share experiences and learn about innovative approaches in cities.

Authors

Christiana K. McFarland, PhD, Research Director, Center for City Solutions

Brooks Rainwater, Senior Executive and Director, Center for City Solutions

Erica Grabowski, Senior Specialist, Center for City Solutions

Joshua Pine, Senior Specialist, Center for City Solutions

Anita Yadavalli, PhD, Program Director, Center for City Solutions

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INTRODUCTION

WHILE THE DUST has not yet settled after a turbulent year, rapid vaccination and slow reopening indicate that 2021 will indeed be an inflection period in our pandemic history. This year, the State of the Cities analysis of survey data and of mayoral state of the city speeches from over 600 cities reveals that mayors from small towns to large urban cores are prioritizing infrastructure, budgets and public safety this year. The State of the Cities 2021 takes stock of how different types of communities have fared through the pandemic and investigates how city leaders are positioning their

communities for the future. We find that experiences and impacts related to COVID-19 are multifaceted. While some striking similarities exist from city to city, important differences also emerged. In particular, survey respondents indicate that clean water access and public spaces have contributed most to community resilience in the face of the pandemic. On housing issues, while home property values increased, affordable housing supply dwindled across most communities. The consequences of these converging trends demonstrate a growing urban-rural divide not only in housing but also resident financial security.

In prior years, State of the Cities data and analysis relied entirely on mayoral state of the city speeches. This year, with fewer mayors delivering speeches (likely due to rapidly evolving and more frequent communications as a result of COVID-19), the analysis is based on a survey of local officials from nearly 600 cities, towns and villages, with 57 mayoral speeches assessed to provide context and grounding to our survey results. Additionally, given different ways

that people and economies have shifted between and within urban and rural places, this year's results are presented for urban core, suburbs, exurbs and rural communities to demonstrate varying impacts where they are evident in order to best inform policy, funding and program responses.

Top Mayoral Priorities

- Infrastructure
- Budget and Management
- Public Safety
- Economic and Workforce Development
- Housing

Top positive conditions that most supported communities through the pandemic

- Home property values
- Availability of parks, recreation and green space
- Access to clean water
- Remote work
- Sales tax collections

Top negative conditions that most challenged communities over the past year:

- Affordable housing supply
- Inactive/vacant commercial developments
- Infrastructure funding
- Price of rentals/apartments
- Total general fund revenue

Our analysis of survey results gauges how key conditions in cities have changed over the past year and which conditions have had the most significant positive and negative local impacts through the pandemic. With little surprise, local economic conditions worsened for most cities over the past year, with major challenges reported for affordable housing supply, vacant developments, and rental housing prices. Worsening economic performance is affecting the housing market and residents' ability to secure affordable housing. In urban cores, many officials reported increases in homelessness, as well as demand for financial assistance, temporary housing, and nutrition assistance. Unemployment in urban cores and new business starts in exurban and rural cities are among the most frequently reported as conditions that have had significant negative local impact over the past year, underscoring business performance as a major issue for cities. Overall, our findings indicate that essential infrastructure enabled community resilience during the pandemic, rising home values and decreasing affordable supply contributed to a growing urban-rural divide, and commercial decline hit smaller communities more drastically than anticipated.



FIGURE 1: MAYORAL PRIORITIES IN 2021

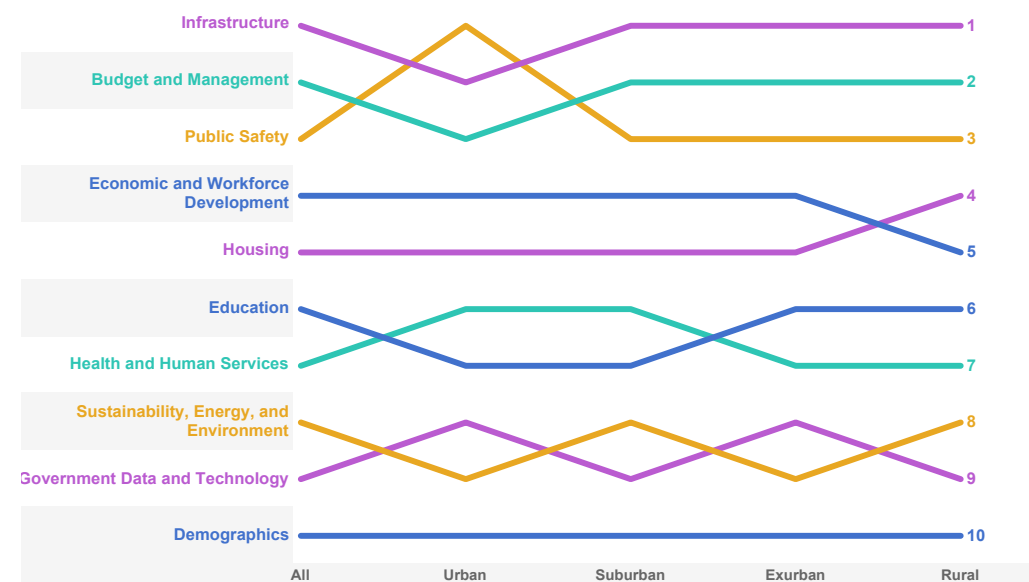
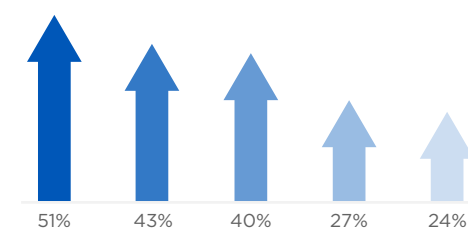
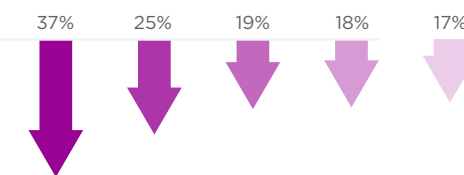


FIGURE 2: TOP 5 POSITIVE CONDITIONS
(% cities reporting condition as one of five most positive conditions over the past year)



- Home property values
- Availability of parks, recreation and community green space
- Access to clean drinking water
- Remote work
- Sales tax collections

FIGURE 3: TOP 5 NEGATIVE CONDITIONS
(% cities reporting condition as one of five most negative conditions over the past year)



- Affordable housing supply
- Inactive/vacant commercial developments
- Infrastructure funding (including climate and resilience-related upgrades)
- Price of rentals/apartments
- Total general fund revenue

FIGURE 4: CITY TYPES



COVID-19 has rocked our community. But we've maintained a laser focus on our people and the services they need. Our focus has not wavered, even when faced with plummeting revenues and rising infection rates and shuttered businesses and the rise of unemployment claims to historic levels and the loss of all of our favorite traditions."¹

MAYOR LINDA GORTON
Lexington-Fayette Urban Government

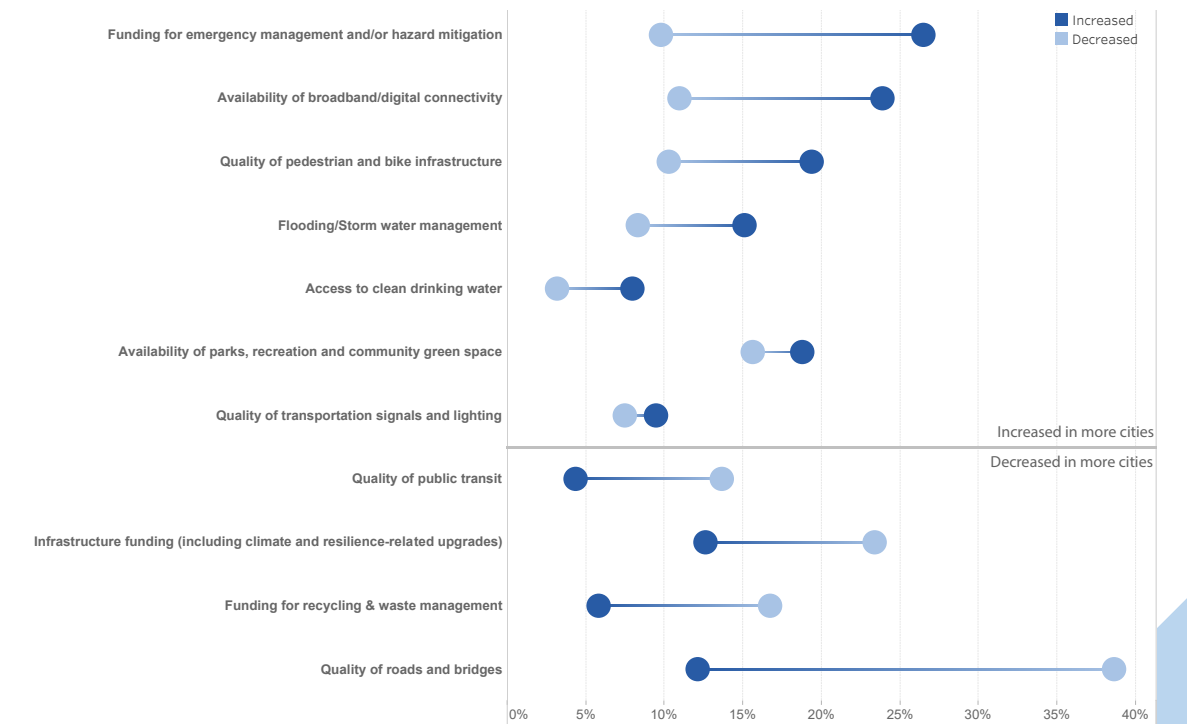
ESSENTIAL INFRASTRUCTURE ENABLES COMMUNITY RESILIENCE

THE PANDEMIC HAS shone a light on the necessity of basic public infrastructure. From clean drinking water to parks and open space, the most crucial elements of community resilience in the face of COVID-19 were aspects of everyday life that we often take for granted. Infrastructure funding, however, ranked among the top challenges facing cities, driving infrastructure to the top of mayoral priorities for 2021. Nearly a quarter of cities experienced fewer infrastructure upgrades over the past year, including those related to climate and resiliency, further reflecting the trend in delayed maintenance resulting from budget challenges. While most infrastructure conditions remained remarkably unchanged over the course of the pandemic, some notable trends emerged (see **figure 5**). Roads and bridges (39%) were the most widely cited area of infrastructure experiencing declining quality over the past year. In terms of improvements, neighborhood level

infrastructure, including availability of parks and green space and quality of pedestrian and bike infrastructure, were reported by more urban (23%, 38%) and suburban (30%, 33%) officials than those in exurban (18%, 14%) and rural areas (10%, 5%). These improvements correlate with the most positive infrastructure conditions highlighted by city leaders, with the top three including clean drinking water, access to parks and broadband availability.

Although few city leaders indicated changes in access to clean drinking water over the past year, access to water was reported by 40% as one of the most significant positive conditions supporting communities during the pandemic. This was especially true for exurban/rural communities, with nearly half of city leaders indicating it as a positive factor, as compared with urban core/suburban cities where only a quarter of leaders indicated it. The importance of handwashing during the pandemic highlighted the critical nature of clean

FIGURE 5: CHANGES IN INFRASTRUCTURE CONDITIONS OVER THE PAST YEAR (% of cities)



water for overall health and hygiene. To ensure more equitable access to water, many cities instituted water shut off moratoriums, including Atlanta, GA², Colorado Springs, CO³ and Bowling Green, KY.^{4,5}

In addition to water infrastructure, the pandemic brought into clear focus the value of public spaces that allow for safe distances, physical activity, fresh air and community. It is not surprising, then, that availability of parks, recreation and community green and open space was widely reported (43%) as a top condition that supported communities through the pandemic. “COVID-19 sidelined many of our [Parks and Recreation’s] community programs and patrons in 2020. However, we were still able to operate safe programs and facilities for our community for most of the

year,” said Mayor Stephanie Orman, of Bentonville, AR. Recognizing the importance of public space during the pandemic, many cities sought to creatively reimagine city streets to allow for safe outdoor activities. In St. Paul, MN, Mayor Carter announced the closure of several city streets to promote safe outdoor walking and biking during the spring and summer.⁷ Richmond, VA launched a “picnic in a parklet” program that converted on-street parking spaces into parklets for outdoor dining.⁸

While access to parks is widely celebrated by city leaders, the Trust for Public Land has documented significant inequities related to access and quality of parks and green space. For example, there are 100 million residents without access to a park within a 10-minute walk from their home and even for those with access, the quality of parks differs significantly. Parks that serve non-white residents are generally much smaller and serve a much larger population as compared to parks in majority white communities.⁹ To broaden access in Little Rock, the city and the Little Rock School District (LRSD) recently announced a community schools initiative to transform the grounds of two community schools into nature-filled greenspaces to allow more opportunity for children to connect with nature.¹⁰

With the shift to remote work and online learning, the pandemic elucidated broadband as critical infrastructure. The availability of broadband and digital connectivity improved in about three in 10 urban core and rural communities, with fewer suburban (18%) and exurban (21%) officials reported

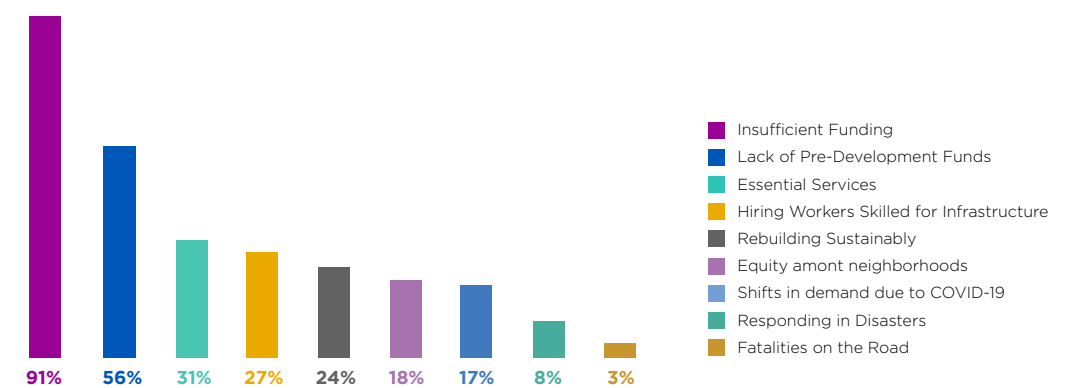
improvements. Twenty percent of city officials surveyed also identified the availability of broadband as a leading positive driver, while 15% indicated it as an area that posed one of the most significant challenges for their community over the past year. Those communities with strong connectivity noted the critical nature of broadband to sustaining their communities, while those with more limited access indicated it as a significant challenge.¹¹ Orlando, FL launched a Wi-Fi hotspot and tablet pilot program to improve digital connectivity with a particular emphasis on job training and supporting online education.¹² Boston, MA announced additional funding for their Digital Equity Fund which is providing \$250,000 to support non-profit organizations that work with underserved communities.¹³

According to Mayor Edward A. Sundquist of Jamestown, NY, “Now, more than ever, we must investigate and invest in municipal broadband for our community. A low cost, high speed option that could provide a free lifeline connection to those in need, and a lower cost option to residents and businesses.”¹⁴

Despite the value placed on critical infrastructure and public spaces, prior NLC research indicates that infrastructure and related budgets have been some of the hardest hit during the pandemic.¹⁵ Indeed, 91% of officials in the State of the Cities survey indicate that insufficient funding was a primary factor impacting infrastructure decisions **(see figure 6)**. As such it is likely that infrastructure may very well be

poised for significant investments as cities prioritize how they spend new Federal government funding. While many cities are already planning to take full advantage of the funding available from the American Rescue Plan Act, infrastructure investments beyond water and broadband are not permitted, reflecting a need for continued Federal support.

FIGURE 6: FACTORS MOST IMPACTING INFRASTRUCTURE DECISIONS (% of cities)



“Having a reliable water supply is just as important as having sustainable energy. This year, construction will ramp up on our Pure Water project, the largest water recycling program in California and the City’s biggest infrastructure project in its history. It will create thousands of good-paying jobs and will provide a third of our drinking water when it is completed.”¹⁶

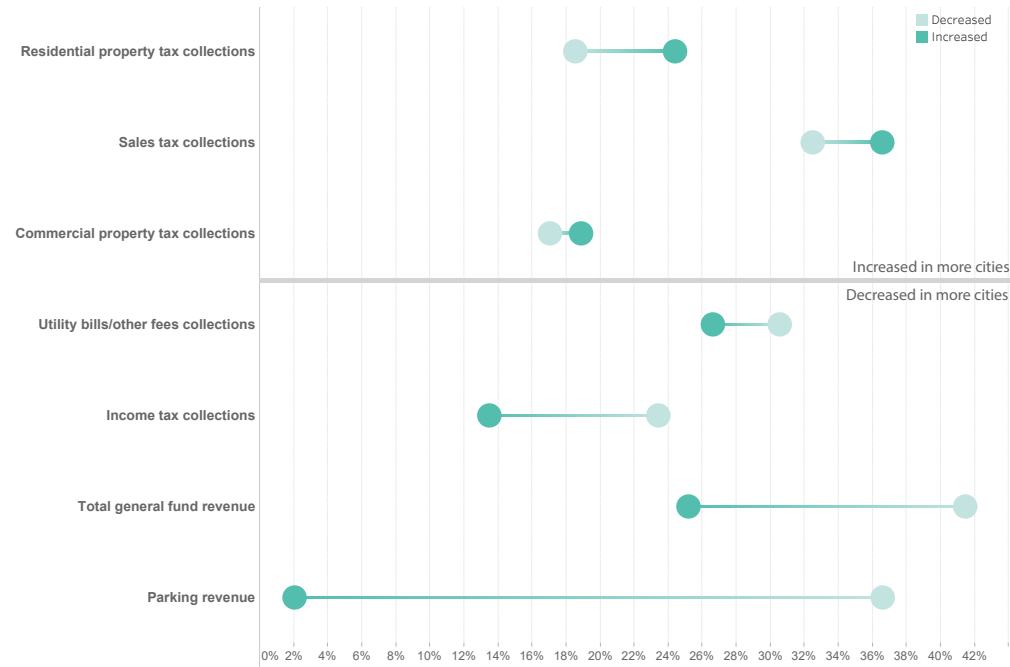
MAYOR TODD GLORIA
City of San Diego

HARD-HIT BUDGETS BEGINNING TO STABILIZE WITH FEDERAL FUNDING

THIS YEAR BUDGET and management ranked second among mayoral priorities for 2021. While this is a shift from years prior, where the topic often ranked in the middle of the pack instead of near the top, it is not surprising. Last year, the COVID-19 pandemic decimated city budgets. In addition to lost revenue as a result of a slowing economy, many cities also took actions to support businesses

and residents that impacted their bottom lines like deferring property taxes, waiving late fees on utilities and providing small business loans.¹⁷ Forty one percent of those surveyed indicated a decrease in their total general fund revenues over the past year, with 17% indicating total general fund revenue as one of the most significant negative conditions affecting their communities (see **figure 7**). Despite the significant

FIGURE 7: CHANGE IN REVENUE SOURCES OVER THE PAST YEAR (% of cities)*



*Does not include those cities that do not have access to the revenue source

share of city officials reporting general fund revenue declines, many indicate that on balance over the year, major components of the general fund, including sales and property tax revenues, had not changed significantly. Meanwhile, many fees, including utility and parking fees, as well as income taxes, demonstrated greater declines. These diverging trends reflect 1) the significant revenue loss experienced by cities early on in the pandemic, particularly sale tax revenue, 2) economic improvements resulting from proactive Federal policy, and 3) the shift in municipal revenue composition toward fees.

In April 2020, NLC and U.S. Conference of Mayors surveyed nearly 2,500 city leaders. At the time, nearly all reported experiencing revenue losses, with at least half of cities indicating that revenues from sales taxes, income taxes and permitting, utility and other service fees had seen immediate and significant losses. More than seven in 10 officials reported that sales tax revenues had declined significantly as a result of quarantining and decreased retail activity. Federal policy that subsequently put money in the hands of individuals and families, as well as some access to revenues from online sales, resulted in approximately two in three city officials in our most recent survey indicating no net change or an

increase in sales tax revenue over the course of the year, with one in three indicating decline.

About six in ten officials report no change in either residential property tax collections (58%) or commercial property tax collections (64%) over the past year, with about two in 10 report increases and similar shares report decreases. While the property market is hot right now, it is more likely that the stability of local property tax revenues is due to the lag between collections and economic conditions, about 18 months to two years, indicating challenges on the horizon.¹⁸ Since the property market suffered earlier on in the pandemic, it's likely that these revenues will see a decline in the upcoming fiscal year.¹⁹ Additionally, last year many cities, including St. Paul, MN; Dallas, TX; San Diego, CA; Jacksonville, FL; and Washington, D.C. avoided tax increases. In St. Paul, Mayor Melvin Carter proposed a zero percent property tax increase, noting how his administration is making "many difficult decisions to avoid adding financial stress for residents and businesses who are already struggling."²⁰

The divergent trends between general fund revenue declines and stability in property and sale tax revenues reflects cities' overall greater reliance on fees for services and development (see sidebar). City officials are reporting more broad-based declines to fee-based revenue sources over the past year, including utility fees (31%) and parking fees (37%). As noted by Troy, NY mayor Patrick Madden, "As the pandemic bore down on us it quickly became apparent that it would have a financial impact on the City...We experienced sizeable reductions in State Aid and departmental revenue such as

building permit fees as construction slowed and parking fees which we waived to assist those working from home."²¹ A greater share of cities with access to the income tax also decreased (23%) revenue over the year than increases (13%). Funding from the American Rescue Plan Act, which was passed by Congress earlier this year and allocates over \$65 billion in Federal funding to local communities, is helping cities like Grand Rapids, MI. The city estimates Federal funding will cover the \$36 million in lost general fund income tax revenues expected between FY 2021 and FY 2022.²²

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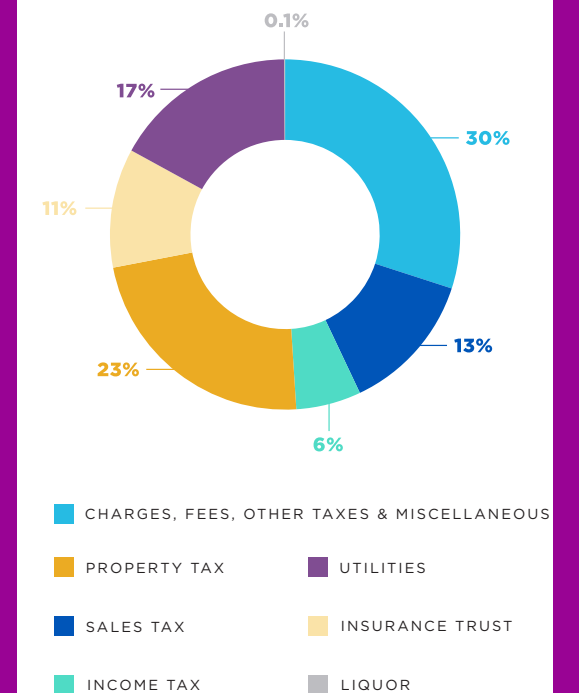
My top priority is to ensure that the needs of the people of Fort Wayne are being met. Through high-trust partnerships with many organizations, we've been able to help make a difference in the lives of residents and business owners. With Federal funding, we've sheltered the homeless, implemented business relief programs, supported local restaurant initiatives, and provided grants to small businesses to assist with COVID-related needs. And now, we're working to get more funds out to families who have fallen behind on their rent and utility bills to help ensure housing stability and prevent homelessness.”²³

MAYOR TOM HENRY TEST
City of Fort Wayne, IN

MUNICIPAL REVENUE

Cities collect roughly \$650 billion in total revenue ranging from intergovernmental aid, taxes, fees for the services cities provide, and other sources of municipal income such as from water utilities. While approximately 20 percent of total city revenues come from aid from other local, state and federal governments, the vast majority of city revenues are derived from economic activity within their communities. These “own-source” streams include taxes (sales, property and income), charges and fees for services, and other governmental revenues on fees from utilities, insurance trusts and liquor. Property tax revenues and charges, fees and miscellaneous revenue are the most significant contributors to city budgets.

FIGURE 8: REVENUE FROM OWN SOURCES



Source: *What COVID-19 Means for City Finance*, National League of Cities, 2020.

REIMAGINING PUBLIC SAFETY A TOP PRIORITY FOR CITIES

THIS YEAR, PUBLIC safety ranked third among mayoral priorities. America's cities continue to work toward more comprehensive public safety solutions in response to calls for racial justice and demands to re-imagine public safety.²⁴ Strategies such as de-escalation and implicit bias training, body cameras and independent oversight bodies²⁵ were seeing ubiquitously²⁶ this past year, and plans for the year ahead. For example, Chicago, IL,²⁷ created a Use of Force Dashboard, and Indianapolis, IN²⁸ created a new facility for use-of-force and de-escalation training to better mimic what police experience day to day. The evidence supports these strategies. The Newark Police Department did not fire a single weapon in 2020 after a focus on de-escalation.²⁹

As public trust in law enforcement officers has decreased considerably, cities from Portland, OR to Austin, TX to Philadelphia, PA shared approaches to demilitarize their police forces. "Please know that we have seen

and heard the cries of thousands of Philadelphians demanding change and proclaiming a simple but powerful truth: Black Lives Matter," said Philadelphia Mayor Jim Kenney.³⁰ "We are focusing on reconciliation, on listening—and on taking action for change." While mayors recognize the need for police reform and efforts to reimagine local systems, public safety did not show up as a top negative condition affecting communities. It also did not show up as a top positive condition.³¹

About six in 10 city officials note that over the past year, crime in their communities has decreased (11%) or experienced no change (48%). When assessing crime rate by community type, four in 10 urban core officials report an increase in crime over the past year, and fewer from other community types reported increases. General trends indicate that crime has not increased significantly, but some places are experiencing upticks in violent crimes. As noted by Mayor Brandon Scott, city of Baltimore, "Violent crime is our biggest

challenge, and reducing it remains my top priority...I established the Office of Neighborhood Safety and Engagement...to implementing our comprehensive violence reduction strategy based in equity, healing, and trauma-informed practices to improve public safety in Baltimore."³² While public safety will continue to

be a vital function of our society, local elected officials are working diligently to engage community members and center racial equity as they rethink public safety and policing.



If the pandemic weren't enough, 2020 brought horrible acts of racial injustice that prompted millions across the nation to pour into the streets and cry out for change. Cary is a diverse community that embraces and celebrates our diversity. There is absolutely no place for injustices of any kind in Cary. [As a result] the town will review police use of force policies and engage our community in a broad range of input, experiences, and stories."³³

MAYOR HAROLD WEINBRECHT
Town of Cary, NC

COMMERCIAL DECLINE HITTING SMALLER TOWNS HARD

THE CONDITIONS UNDERLYING local economies across the country over the past year demonstrate consistencies in the hardships felt to small businesses, low and mid-wage workers and the commercial sector. A majority of officials reported increases in need for small business emergency assistance (68%) and unemployment among low and mid-wage workers (53%). Not surprising, inactive and vacant commercial developments was the most widely cited (25%) economic development condition causing major negative impacts in cities over the past year (see appendix). On the other hand, as the pandemic has shifted the dynamics of office work, remote work increased across communities, with more than one in four indicating remote work as the top economic development condition driving positive outcomes in communities.

As remote work becomes part of the new normal for many businesses and

workers, Americans may continue to see smaller cities and towns as desirable places to locate regardless of where their employer is based. Our survey results indicate, however, that the promises of an “outpost economy,” where employment bases are less concentrated in large cities and more dispersed among smaller towns that offer quality of life and greater connections to nature, have yet to take hold at scale.³⁴ Additionally, while much attention has been paid to the plight of hollowing urban downtowns and office districts, small business and commercial decline appear to be hitting smaller towns particularly hard as well.

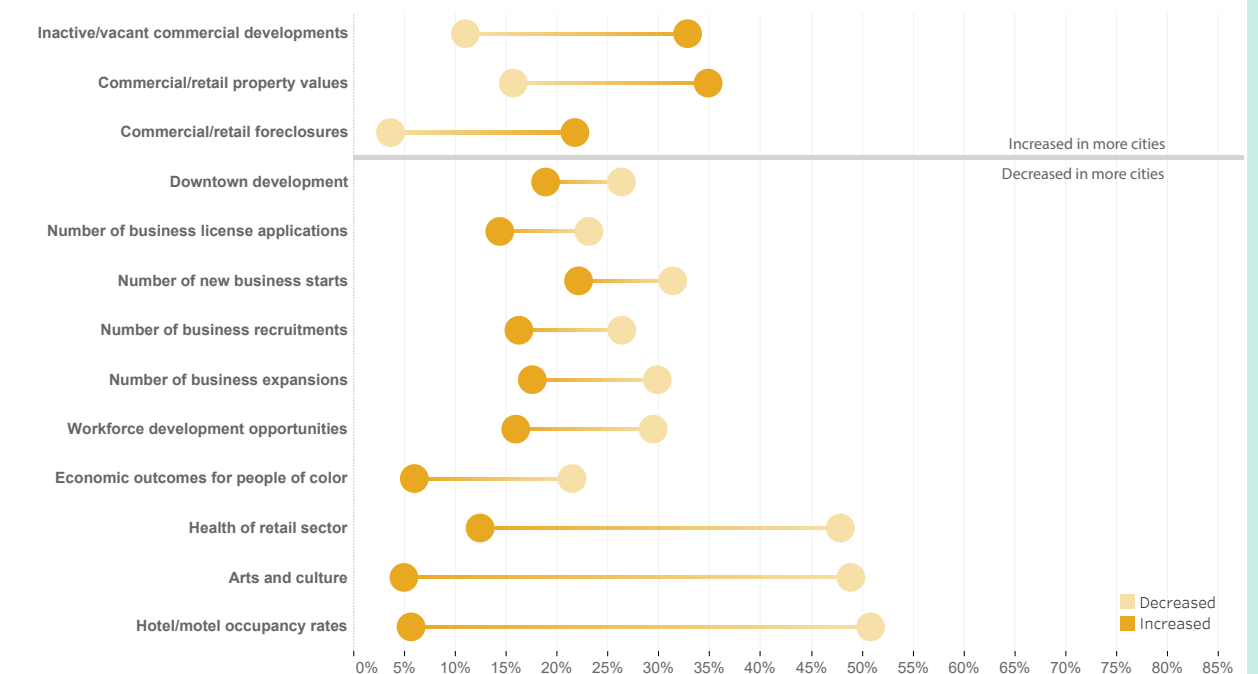
Officials from urban core cities and suburbs are more likely to indicate increases in inactive and vacant commercial developments and commercial foreclosures as well as decreases in downtown development and new business starts over the past year, but nearly one in three also report downtown development as a

top positive factor over the past year (see figure 9). Officials from exurban and rural communities are more likely to indicate that these “main street” challenges have significantly and negatively affected their communities. About one in five exurban and rural officials indicate declines in new businesses as a major problem facing their communities, whereas less than 10% of officials from urban and suburban communities report the same. The depth of these challenges for rural communities reflects the reliance on and critical importance of vibrant downtowns to sustaining local tax bases and employment, creating

attachment to place and keeping rural communities strong.³⁵

Another area where differences emerge between more urban and more rural communities is economic outcomes for people of color. While declining economic outcomes for people of color is reported by nearly one of two urban city leaders and three in 10 suburban officials, exurban (15%) and suburban officials (9%) were much less likely to report decreased outcomes for people of color. Importantly, much larger shares of officials from smaller communities report not knowing

FIGURE 9:
CHANGE IN ECONOMIC DEVELOPMENT CONDITIONS OVER THE PAST YEAR (% of cities)



whether outcomes for people of color have improved or worsened. While rural areas tend to be older and less racially diverse than urban centers, 2012 research found that 22% of rural residents are people of color.³⁶ Furthermore, over the last decade, the share of non-metropolitan area populations that are communities of color has exhibited an upward trajectory.³⁷ Overall, despite influxes of people of color to smaller and more rural places as well as stark data demonstrating disparate impact of COVID-19 on people of color, officials from these communities are challenged in measuring economic impact with an equity lens.

The lack of available data and knowledge about racial inequities in more rural communities demonstrates the need for greater support and resources to disaggregate economic and other data by race, understand disproportionate impact, engage residents and align local strategies. As noted by The Washington Center for Equitable Growth, “Failing to recognize that certain communities are more exposed to the coronavirus and preferencing “colorblind” policy will reinforce the systemic racism that made these communities so vulnerable in the first place. It will also make those communities more

vulnerable in the next crisis.”³⁸ Understanding these challenges, some cities have taken action on disaggregating data during the pandemic to address disproportionate impact. For example, when deciding where to expand testing sites last year, Austin, TX used data to determine those areas of the city most impacted by COVID-19.³⁹ Using data to target resources also allowed the health department to better engage with residents to address the barriers related to transportation, language and misinformation and improve services for lower-income families and communities of colors.⁴⁰ Extending a data-driven approach to other outcome areas, including economic outcomes, is a necessary step improving the lives of everyone in our communities.



“

While we will continue our efforts to attract new jobs, we know that entrepreneurship also builds wealth and provides stability for families and communities. New businesses are the lifeblood of a city, but the pandemic has exposed the disparities in who’s able to get ahead. This begs the question: what can we do to create new jobs, level the playing field, and reduce economic injustice during this recovery? Little Rock’s answer is BUILD Academy, a 12-week small business incubator to serve as a front door for current and future business owners in our city.”⁴¹

MAYOR FRANK D. SCOTT, JR.
Little Rock, AR

RISING HOME VALUES AND DECREASING SUPPLY CONTRIBUTE TO GROWING URBAN-RURAL DIVIDE

WHILE HOUSING RANKED fifth among mayoral priorities for 2021, a deeper dive into the data on changing local conditions further illuminates housing as a key area of focus for cities. Housing rises to the top of both positive and negative conditions affecting communities over the past year. Home prices in 2021 are at a record high,⁴² driven by a low supply of homes as housing construction lags due to zoning restrictions, a stall in the lumber supply,⁴³ and a boom in demand from households benefitting from more flexibility from remote work, stimulus checks, student loan benefits, and low interest rates.⁴⁴ As home values and rental prices have skyrocketed, affordable housing supply has dwindled, and residential vacancies, demand for financial assistance and demand for temporary housing have increased.

Home property values is the most widely cited (51%) factor driving significant positive local conditions,

with 68% reporting that home values in their communities increased this year (see figure 10). Meanwhile affordable housing supply is the most widely cited (37%) factor driving negative local outcomes. The consequences of these converging trends demonstrate a growing urban-rural divide not only in housing but also resident financial security. In urban cores, large majorities of officials reported increases in homelessness (63%), as well as need for financial assistance (92%), temporary housing (74%), and nutrition assistance (73%). Three in 10 indicate homelessness as a major concern for their community. With homelessness so high, many cities are expanding temporary housing and shelters. Decreases in hotel/motel occupancies (51%) due to decreases in travel provided an opportunity for some cities like Baltimore, MD⁴⁵, Lewiston, ME⁴⁶, Denver, CO⁴⁷ to explore purchasing vacant hotels to use as shelters. Other initiatives in Philadelphia, PA⁴⁸ and

FIGURE 10:
CHANGES IN HOUSING AND HUMAN SERVICES CONDITIONS OVER THE PAST YEAR (% of cities)



Denver, CO⁴⁹ expand access to vital services (including transportation, vaccinations) to individuals and families experiencing homelessness.

Eviction rates in 2020 were generally lower than in 2019 due to a Federal eviction moratorium issued by the Centers for Disease Control and Prevention (CDC) during the COVID-19 pandemic.^{50, 51} However, as this moratorium expires this year, evictions are an area of concern. Already, 24% of urban core cities and 19% of suburban cities report an increase in evictions from last year. Cities will need to address this area with urgency, recognizing that evictions are not only a result of poverty but a root cause of poverty and that evictions disproportionately

affect people of color. Before the pandemic, one out of every 20 renters faced an eviction each year, including one out of every 11 Black renters.⁵²

Unfortunately, the problem is even more difficult to solve because of lack of eviction data. Thirty-eight percent of rural; 30% of suburban; 30% of exurban; and 22% of urban core city officials report not knowing whether evictions have increased or decreased from last year. Considering the absence of national data on evictions available at a granular level,⁵³ one of the first steps for cities to address in partnership with the Federal government and others is to create timely and reliable data collection processes. With a better understanding of the causes

and challenges of evictions particular to their city, officials can come up with a plan of action of targeted strategies to keep residents housed. Strategies include mediation services, legal aid to tenants, eviction diversion programs, and emergency rental assistance. Cities like Portland, OR⁵⁴, Jacksonville, FL⁵⁵ and others are expanding legal protections and offering legal support for renters now. Additionally, providing tenants the opportunity to pay back rent owed through emergency rental assistance or through an eviction diversion strategy including payment plans can help residents stay housed. Strategies like these have had proven success in Richmond VA⁵⁶, Newark NJ⁵⁷, Greensboro NC⁵⁸, Durham County, NC⁵⁹, and Palo Alto, CA.⁶⁰



“

[A] priority is housing, and this need has been intensified by the pandemic and its economic toll. I recently issued a housing directive geared at “housing for all,” which seeks to add more housing at all price points so everyone who lives and works in Everett can afford a home and access the great amenities our city has to offer. We also have a growing need for shelter and are moving forward with new initiatives to expand shelter capacity.”⁶¹

MAYOR CASSIE FRANKLIN
City of Everett, WA



CONCLUSION

MAYORS HAVE LED our nation's cities through one of the most tumultuous times in American history. As we continue to address our collective trauma, vaccinations and proactive policymaking are allowing our cities to move from muddling through to recovery to rebuilding. State of the City speeches provide the pulse of what mayors are focused on accomplishing in our cities. This year they demonstrate this shift from survival to bold thinking and provide a glimpse into what we can expect in the months and years ahead. From Pure Water, a massive sustainable water project in San Diego, to parklets in Richmond, creative reimagining in big and small ways is leading the way. These issues and solutions show up differently in urban and rural communities indicating how geographic differences continue to broadly influence economic and health outcomes, as well as how city leaders are addressing them.

Our analysis also reveals that mayors continue to focus on equity. The murder of George Floyd and other Black men by police officers, the racial uprisings and protests of 2020, and the disparate impact of Covid-19 on Black and Brown communities converged over this last year to continue to drive home the critical work to rectify inequities and injustices. This focus on equity, however, has emerged in different

ways. For example, communities centered economic outcomes for people of color differently dependent on geography. In large cities and suburban communities, the recognition of disparate challenges was high, but in rural areas, less so. A key piece of this is that much larger shares of officials from smaller communities' report not knowing whether outcomes for people of color have improved or worsened. Similar challenges were evident in our analysis of evictions. Issues with data create a knowledge gap that perpetuates color blind policies that do not acknowledge or confront racism, systematic or otherwise. Local strategies that create positive outcomes for people of color are necessary to improving equity. These trends point to the need for localized data with more nuanced disaggregations by race.

Our nation's local leaders have been on the front lines this last year, doing all that they can to support residents and businesses in their time of need. As tends to be the case, when our nation is most tested, some of the most valued leadership and innovative ideas percolate from the ground up. Our current circumstance proves no different. Mayors are the leaders our nation needs to continue to succeed and flourish.

APPENDICES

CHANGES IN CONDITIONS OVER THE PAST YEAR BY CITY TYPE (% of cities reporting)

Category	Condition	All			1. Core			2. Suburban			3. Exurban			4. Rural		
		Inc.	Dec.	Gap	Inc.	Dec.	Gap	Inc.	Dec.	Gap	Inc.	Dec.	Gap	Inc.	Dec.	Gap
Budget	Residential property tax collections	22%	-17%	5%	26%	-15%	11%	26%	-15%	12%	19%	-12%	7%	18%	-22%	-3%
	Sales tax collections	29%	-26%	3%	35%	-35%	0%	30%	-31%	-1%	26%	-30%	-4%	28%	-16%	12%
	Commercial property tax collections	16%	-14%	2%	23%	-24%	-1%	19%	-15%	4%	11%	-12%	-1%	13%	-12%	1%
	Income tax collections	6%	-11%	-5%	3%	-11%	-9%	8%	-12%	-4%	7%	-9%	-2%	6%	-12%	-7%
	Utility bills/other fees collections	25%	-29%	-4%	21%	-41%	-20%	24%	-36%	-12%	24%	-26%	-2%	29%	-22%	7%
	Total general fund revenue	25%	-40%	-16%	26%	-50%	-24%	34%	-44%	-10%	21%	-42%	-20%	17%	-33%	-16%
	Parking revenue	1%	-15%	-14%	0%	-46%	-46%	2%	-21%	-19%	0%	-7%	-7%	0%	-5%	-5%
Economic Development	Remote work	84%	-1%	83%	97%	-1%	96%	93%	-2%	91%	82%	-2%	81%	73%	-1%	72%
	Demand for small business emergency assistance	68%	-2%	66%	90%	-1%	89%	79%	-1%	78%	61%	-2%	59%	54%	-3%	51%
	Unemployment amongst low-mid income workers	53%	-11%	42%	65%	-15%	50%	63%	-12%	51%	41%	-12%	29%	47%	-8%	39%
	Inactive/vacant commercial developments	33%	-11%	22%	46%	-14%	32%	41%	-16%	25%	31%	-6%	25%	22%	-8%	14%
	Commercial/retail foreclosures	22%	-4%	18%	35%	-6%	30%	31%	-4%	27%	15%	-6%	10%	13%	-1%	12%
	Commercial/retail property values	35%	-16%	19%	35%	-25%	10%	48%	-15%	33%	30%	-14%	17%	25%	-14%	11%
	Downtown development	19%	-26%	-7%	25%	-31%	-6%	25%	-27%	-2%	14%	-28%	-14%	14%	-23%	-9%
	Number of business license applications	14%	-23%	-9%	21%	-38%	-17%	21%	-24%	-3%	10%	-24%	-14%	8%	-17%	-9%
	Number of new business starts	22%	-31%	-9%	19%	-49%	-29%	27%	-34%	-6%	24%	-29%	-5%	17%	-25%	-8%
	Number of business recruitments	16%	-26%	-10%	13%	-39%	-26%	22%	-32%	-10%	18%	-19%	-1%	11%	-21%	-10%
	Workforce development opportunities	16%	-29%	-14%	29%	-33%	-4%	19%	-35%	-16%	15%	-26%	-11%	10%	-26%	-15%
	Number of business expansions	18%	-30%	-12%	19%	-40%	-21%	25%	-38%	-13%	18%	-22%	-4%	10%	-24%	-14%
	Economic outcomes for people of color	6%	-21%	-16%	8%	-46%	-38%	9%	-30%	-21%	5%	-15%	-10%	2%	-9%	-7%
	Health of retail sector	12%	-48%	-35%	15%	-68%	-53%	14%	-53%	-39%	11%	-46%	-35%	10%	-37%	-27%
	Arts and culture	5%	-49%	-44%	10%	-67%	-57%	5%	-55%	-50%	5%	-49%	-44%	3%	-38%	-36%
	Hotel/motel occupancy rates	6%	-51%	-45%	4%	-82%	-77%	7%	-60%	-53%	4%	-42%	-38%	6%	-38%	-32%
Health and Human Services	Demand for resident financial assistance (including rental, mortgage and utility assist)	64%	0%	64%	92%	0%	92%	69%	0%	69%	56%	0%	56%	56%	0%	56%
	Demand for emergency nutrition	56%	-1%	55%	72%	-1%	71%	62%	0%	62%	53%	-1%	52%	46%	-2%	44%
	Homelessness	28%	-1%	26%	63%	-1%	61%	38%	-1%	37%	18%	0%	18%	13%	-2%	11%
	Demand for temporary housing (including shelters, short term rentals)	38%	-1%	37%	74%	0%	74%	41%	-65%	-14%	33%	0%	33%	26%	-2%	24%
	Population (change)	36%	-7%	29%	40%	-14%	26%	48%	-3%	45%	35%	-7%	28%	24%	-7%	17%
	Crime rate	31%	-11%	21%	40%	-18%	22%	28%	-18%	10%	36%	-6%	31%	28%	-5%	23%
	Health care access	25%	-12%	13%	32%	-14%	18%	30%	-12%	18%	22%	-10%	12%	19%	-13%	7%
	Evictions	15%	-10%	5%	24%	-18%	6%	19%	-12%	7%	15%	-11%	3%	8%	-4%	4%
Housing and Neighborhood	Home property values	68%	-5%	63%	79%	-3%	76%	85%	-2%	82%	66%	-6%	61%	51%	-8%	43%
	Price of rentals/apartments	50%	-3%	47%	57%	-8%	49%	58%	-3%	55%	47%	-2%	46%	42%	-2%	40%
	Residential foreclosures	12%	-9%	4%	18%	-14%	4%	14%	-12%	2%	12%	-10%	2%	9%	-4%	6%
	Neighborhood stabilization/vibrancy	13%	-19%	-5%	14%	-28%	-14%	20%	-15%	5%	12%	-20%	-8%	8%	-18%	-10%
	Residential property vacancy	12%	-35%	-23%	21%	-37%	-15%	6%	-40%	-34%	10%	-35%	-25%	15%	-30%	-15%
Infrastructure and Resilience	Affordable housing supply	9%	-43%	-33%	14%	-47%	-33%	15%	-42%	-26%	6%	-41%	-35%	4%	-43%	-40%
	Funding for emergency management and/or hazard mitigation	27%	-10%	17%	42%	-11%	31%	32%	-12%	20%	25%	-11%	14%	19%	-7%	12%
	Availability of broadband/digital connectivity	24%	-11%	13%	34%	-18%	15%	18%	-9%	8%	21%	-12%	9%	28%	-10%	18%
	Quality of pedestrian and bike infrastructure	20%	-10%	9%	38%	-7%	31%	33%	-9%	24%	14%	-13%	2%	5%	-12%	-7%
	Flooding/Storm water management	15%	-8%	7%	23%	-6%	17%	19%	-9%	10%	14%	-10%	4%	11%	-7%	3%
	Access to clean drinking water	8%	-3%	5%	10%	-1%	8%	12%	-2%	10%	3%	-4%	-1%	7%	-4%	3%
	Availability of parks, recreation and/OR community green space	19%	-16%	3%	23%	-18%	4%	30%	-17%	13%	18%	-18%	0%	10%	-13%	-4%
	Quality of transportation signals and lighting	10%	-8%	2%	17%	-10%	7%	17%	-6%	11%	5%	-12%	-7%	3%	-6%	-3%
	Quality of public transit	4%	-14%	-9%	6%	-14%	-8%	9%	-25%	-16%	2%	-11%	-10%	1%	-6%	-5%
	Infrastructure funding (including climate and resilience-related upgrades)	13%	-24%	-11%	20%	-24%	-4%	18%	-27%	-9%	8%	-26%	-18%	8%	-20%	-12%
	Funding for recycling & waste management	6%	-17%	-11%	11%	-15%	-4%	8%	-14%	-7%	2%	-23%	-21%	4%	-16%	-12%
	Quality of roads and bridges	12%	-39%	-27%	21%	-31%	-10%	15%	-31%	-16%	10%	-47%	-36%	7%	-44%	-37%

MOST SIGNIFICANT NEGATIVE CONDITIONS OVER THE PAST YEAR BY CITY TYPE (% of cities reporting as one of five top conditions)

Category	Condition	All	Urban	Suburban	Exurban	Rural
Budget	Total general fund revenue	17.41%	12.33%	20.99%	18.11%	14.42%
	Utility bills/other fees collections	12.12%	6.85%	11.05%	13.39%	13.49%
	Sales tax collections	4.78%	5.48%	9.94%	2.36%	1.40%
	Residential property tax collections	3.58%	1.37%	5.52%	3.94%	2.33%
	Parking revenue	2.90%	9.59%	3.87%	0.79%	0.47%
	Income tax collections	1.37%	0.00%	1.66%	0.79%	1.40%
	Commercial property tax collections	1.02%	2.74%	1.66%	0.79%	0.00%
Economic Development	Inactive/vacant commercial developments	25.26%	12.33%	24.31%	27.56%	27.44%
	Hotel/motel occupancy rates	16.72%	30.14%	25.41%	9.45%	8.37%
	Number of new business starts	16.04%	6.85%	8.84%	18.11%	23.26%
	Downtown development	15.53%	9.59%	9.39%	20.47%	19.07%
	Workforce development opportunities	12.12%	8.22%	12.15%	12.60%	12.56%
	Number of business recruitments	11.09%	5.48%	11.05%	8.66%	13.49%
	Health of retail sector	11.09%	15.07%	11.05%	11.02%	9.30%
	Demand for small business emergency assistance	10.24%	10.96%	14.92%	7.09%	7.44%
	Arts and culture	9.39%	9.59%	8.84%	8.66%	9.77%
	Number of business expansions	8.02%	1.37%	6.08%	9.45%	10.70%
	Economic outcomes for people of color	7.17%	19.18%	11.60%	1.57%	1.86%
	Remote work	4.10%	1.37%	6.63%	1.57%	4.19%
	Commercial/retail property values	3.24%	2.74%	5.52%	1.57%	2.33%
	Commercial/retail foreclosures	3.07%	4.11%	5.52%	1.57%	1.40%
	Number of business license applications	2.73%	2.74%	2.21%	1.57%	3.26%
	Unemployment amongst low-mid income workers	0.00%	0.00%	0.00%	0.00%	0.00%
Health and Human Services	Crime rate	16.55%	26.03%	12.71%	15.75%	16.28%
	Demand for resident financial assistance (including rental, mortgage and utility assistance)	14.33%	20.55%	17.13%	10.24%	11.63%
	Demand for emergency nutrition	11.60%	13.70%	11.05%	12.60%	9.30%
	Homelessness	10.58%	30.14%	12.15%	9.45%	2.33%
	Demand for temporary housing (including shelters, short term rentals)	9.39%	16.44%	7.73%	6.30%	9.77%
	Population Decrease	7.34%	5.48%	2.76%	7.09%	11.63%
	Health care access	4.95%	4.11%	2.21%	5.51%	6.98%
	Population Increase	3.41%	4.11%	1.66%	3.15%	4.65%
	Evictions	1.71%	6.85%	1.66%	0.79%	0.47%
Housing and Neighborhood	Affordable housing supply	36.86%	32.88%	33.70%	38.58%	38.14%
	Price of rentals/apartments	18.26%	12.33%	21.55%	14.96%	16.60%
	Neighborhood stabilization/vibrancy	13.82%	12.33%	8.84%	11.81%	19.07%
	Home property values	6.31%	0.00%	8.29%	3.94%	7.91%
	Residential property vacancy	5.97%	4.11%	1.10%	7.09%	9.77%
	Residential foreclosures	1.54%	0.00%	1.66%	1.57%	1.40%
Infrastructure and Resilience	Infrastructure funding (including climate and resilience-related upgrades)	19.11%	15.07%	19.34%	25.98%	15.35%
	Availability of broadband/digital connectivity	15.36%	17.81%	14.36%	16.54%	13.95%
	Flooding/Storm water management	9.22%	2.74%	10.50%	13.39%	6.98%
	Quality of public transit	6.14%	9.59%	7.18%	4.72%	4.19%
	Funding for recycling & waste management	5.12%	2.74%	6.08%	3.15%	6.05%
	Funding for emergency management and/or hazard mitigation	4.61%	2.74%	0.00%	7.09%	5.58%
	Quality of transportation signals and lighting	1.19%	0.00%	1.66%	0.00%	1.86%
	Access to clean drinking water	0.85%	0.00%	1.10%	0.79%	0.93%
	Quality of roads and bridges	0.00%	0.00%	0.00%	0.00%	0.00%
	Quality of pedestrian and bike infrastructure	0.00%	0.00%	0.00%	0.00%	0.00%
	Availability of parks, recreation and/OR community green space	0.00%	0.00%	0.00%	0.00%	0.00%

MOST SIGNIFICANT POSITIVE CONDITIONS OVER THE PAST YEAR BY CITY TYPE (% of cities reporting as one of five top conditions)

Category	Condition	All	Urban	Suburban	Exurban	Rural
Budget	Sales tax collections	24.41%	27.40%	21.55%	18.90%	28.37%
	Total general fund revenue	21.19%	19.18%	21.55%	20.47%	20.93%
	Residential property tax collections	17.12%	17.81%	22.10%	17.32%	12.09%
	Utility bills/other fees collections	11.36%	2.74%	6.63%	12.60%	17.21%
	Commercial property tax collections	5.93%	12.33%	4.42%	7.87%	3.26%
	Income tax collections	2.71%	2.74%	3.87%	3.15%	1.40%
	Parking revenue	0.34%	0.00%	1.10%	0.00%	0.00%
Economic Development	Remote work	27.46%	30.14%	20.44%	29.92%	29.77%
	Downtown development	16.61%	27.40%	23.20%	11.81%	9.77%
	Commercial/Retail property values	11.02%	15.07%	12.71%	12.60%	6.51%
	Number of new business starts	10.00%	5.48%	11.60%	11.81%	8.84%
	Number of business expansions	8.14%	5.48%	11.60%	8.66%	5.12%
	Workforce development opportunities	7.12%	12.33%	6.63%	7.87%	5.12%
	Arts and culture	7.12%	10.96%	8.29%	8.66%	3.72%
	Health of retail sector	5.93%	8.22%	6.63%	2.36%	6.51%
	Number of business recruitments	5.08%	9.59%	4.97%	6.30%	2.79%
	Number of business license applications	5.08%	8.22%	4.97%	3.15%	5.12%
	Hotel/motel occupancy rates	3.90%	4.11%	1.10%	5.51%	5.12%
	Economic outcomes for people of color	2.03%	2.74%	1.66%	2.36%	1.86%
Health and Human Services	Health care access	24.41%	26.03%	19.34%	25.98%	26.05%
	Population increase	17.80%	15.07%	25.97%	14.17%	13.02%
	Crime rate decrease	9.66%	9.59%	13.81%	8.66%	6.51%
	Population decrease	0.85%	0.00%	1.66%	0.79%	0.47%
Housing and Neighborhood	Home property values	50.51%	54.79%	54.14%	52.76%	42.79%
	Neighborhood stabilization/vibrancy	11.36%	6.85%	14.92%	13.39%	8.37%
	Affordable housing supply	8.31%	1.37%	9.94%	6.30%	10.23%
	Price of rentals/apartments	4.24%	1.37%	2.21%	5.51%	6.05%
Infrastructure and Resilience	Availability of parks, recreation and/OR community green space	43.05%	38.36%	45.86%	40.94%	40.93%
	Access to clean drinking water	40.17%	24.66%	30.94%	44.09%	49.30%
	Availability of broadband/digital connectivity	20.34%	15.07%	11.60%	21.26%	27.91%
	Funding for emergency management and/or hazard mitigation	7.80%	12.33%	8.29%	5.51%	6.98%
	Infrastructure funding (including climate and resilience-related upgrades)	7.46%	9.59%	7.18%	6.30%	7.44%
	Flooding/Storm water Management	5.59%	6.85%	6.63%	3.94%	5.12%
	Quality of transportation signals and lighting	3.05%	2.74%	4.42%	2.36%	2.33%
	Quality of public transit	2.71%	2.74%	3.31%	2.36%	1.86%
	Funding for recycling & waste management	1.69%	0.00%	2.76%	3.15%	0.47%
	Quality of roads and bridges	0.00%	0.00%	0.00%	0.00%	0.00%
	Quality of pedestrian and bike infrastructure	0.00%	0.00%	0.00%	0.00%	0.00%

METHODOLOGY

THIS REPORT REFERENCES findings from a survey conducted by National League of Cities in March and April 2021 and from mayoral 'state of the city' addresses given between January 1 and March 31, 2021. The objective of the survey is to determine the top policy areas of priority in 2021 for mayors and city governments, and to explore the landscape of these policy areas by gauging changes in local conditions and which conditions had the most significant impacts. NLC has conducted an annual review of mayoral state of the city speeches since 2011. By assessing the top policy areas identified through the inductive process of speech coding in NLC's 2014-2020 studies, we identified 10 areas that were most popular among mayors: Economic Development, Infrastructure, Housing, Energy & Environment, Public Safety, Demographics, Budgets & Management, Health & Human Services, Education, Government Data & Technology.

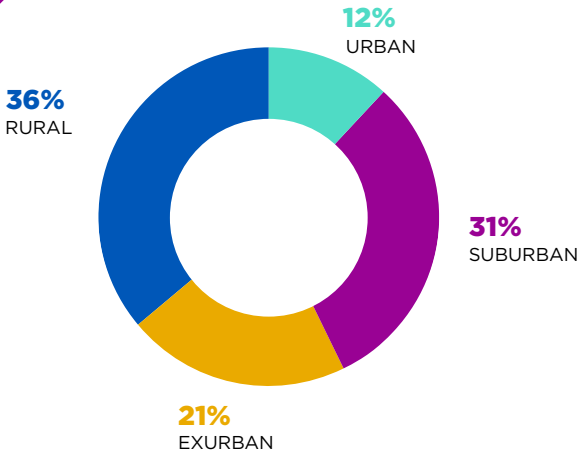
In the 2021 survey, we asked respondents to rank the 10 policy areas in terms of priority for their city's mayor. We identified the top priorities for 2021 by averaging the ranking of each policy area. We also identified indicators, or conditions, related to each policy area (i.e. business starts, remote work, downtown development are related to Economic Development policy area) and asked respondents to report whether each indicator had increased, decreased, stayed the same, or whether they didn't know. Additionally, of all conditions, we asked respondents to select their the most positive and five most negative conditions affecting their communities over the past year. In assessing the survey results, we wanted to get a sense of how priorities and challenges vary or are consistent across urban and rural cities this year. Our report refers to four types of cities: Urban core, Suburban, Exurban, and Rural, which are defined using a combination of Federal definitions, population thresholds and survey responses asking for "city type."

URBAN core cities are the core of a region that is economically connected. Specifically, in this report 'urban core cities' are principal cities of a CBSA.

SUBURBAN cities, under this methodology, are cities that: are in a CBSA, are not a principal city, and did not select "Rural city or town" in our survey.

EXURBAN cities are cities connected to a major economic region but are not as closely connected as suburban or as densely populated. In this report, exurban refers to cities that are in a CBSA, are not a principal city, and did select "Rural city or town" in our survey.

RURAL cities are those that are not in a CBSA, or that are in a CBSA but also selected 'Rural city or town' in the survey and have a population of less than 1,000.



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