

CHAPTER SEVEN

Comparative Property Values Analysis Use of GIS Mapping to Review Property Appraisal Data

Timothy McLendon & JoAnn Klein
Center for Governmental Responsibility
University of Florida Levin College of Law

James C. Nicholas
Professor of Urban & Regional Planning & Affiliate Professor of Law
University of Florida

Stanley Latimer
Research Scientist, Geoplan Center
University of Florida, Department of Urban & Regional Planning

INTRODUCTION

This study employed Geographic Information Systems (GIS) technology and data to compare property appraisals from 1992, 1997 and 2001 for neighborhoods within the following Florida cities: 1) Gainesville (two historic districts); 2) Ocala (two districts); 3) Jacksonville (two districts); 4) Tampa (two districts); 5) St. Petersburg (four districts); 6) Lakeland (four districts); 7) West Palm Beach (two districts); and 8) Lake Worth (one district). For the most part, the study focused on neighborhoods in residential historic districts, the two exceptions being the mixed use districts in Ybor City in Tampa and Springfield in Jacksonville.

The purpose of this comparative study was to use GIS techniques to demonstrate the effects of historic preservation programs on local property values. For this reason, each selected historic district was compared with one or more neighborhoods in the same city selected as being demographically and economically comparable.

SUMMARY OF FINDINGS

Researchers traced assessed values for some 28,000 parcels of mainly *single family* residential property, looking at 1992, 1997 and 2001. These parcels represented eighteen historic districts and twenty-five comparison neighborhoods in eight large and medium-sized Florida cities. Analysis of these districts shows that average assessed values increased over the ten-year period from 1992-2001 in both the historic districts and the comparison neighborhoods.

For the period from 1992-97, assessed values increased at a higher rate in 16 historic districts, while 4 of the comparison neighborhoods showed a higher rate of increase than their historic districts. For the period from 1997-2001, 13 historic districts witnessed a greater percentage increase in assessed values, while 6 comparison neighborhoods outperformed their historic districts. Over the entire term from 1992-2001, 16 historic districts and 4 comparison neighborhoods witnessed greater total percentage increases in assessed values.

Exhibit 7.1
Summary of Findings

CITY/AREA	HIGHER INCREASE
GAINESVILLE:	
Northeast Historic District	HD
Golfview	
Pleasant Street Historic Dist.	HD
5th Avenue	
JACKSONVILLE:	
Riverside/Avondale Historic Dist.	~ HD
Ortega & San Marcos	
OCALA:	
Ocala Historic District	HD
The Pines	
Tusawilla Park Hist. Dist.	HD
East Tusawilla	

CITY/AREA	HIGHER INCREASE
TAMPA:	
Hyde Park Historic District	HD
Davis Island	
Ybor City Historic District.	HD
West Tampa	
ST PETERSBURG:	
North Shore Historic District	~ HD
Lakewood, Northeast & Placido Bayou	
Historic Kenwood	HD
Meadowlawn	
Poser Park Historic District	HD
Bartlett Park	
Round Lake Historic District	HD
Euclid St. Paul	
LAKELAND:	
East Lake Morton Historic Dist.	HD
Biltmore	
Dixieland Historic District	HD
Camphor	
Beacon Hill Historic Dist.	Tie
Southwest	
South Lake Morton Historic Dist.	HD
Lake Hollingsworth	
WEST PALM BEACH:	
Northboro Park Historic Dist.	HD
Northwood Hills	
Flamingo Park Historic Dist.	Tie
Sunshine Park	
LAKE WORTH:	
Old Lucerne Historic Dist.	HD
North Lake Worth	
TOTALS:	
Historic Areas	18
Comparables	23
HIGHER INCREASE IN VALUE	
Historic District	14
Percent	77.8%
Other Area	2
Percent	11.1%
Tie	2
Percent	11.1%

This initial Florida survey of assessed values suggests that historic properties tend to maintain their value, and increase at a similar or slightly greater rate than comparable non-historic properties in most cases. Although this study will need to be supplemented by research that takes into account variables such as house or lot size, and improvements to property, as well as recent sales prices, it nevertheless provides a look at how the average residential property in an historic neighborhood performs compared with similar property in non-historic neighborhoods.

OTHER STUDIES EVALUATING HISTORIC PRESERVATION AND LOCAL COMMUNITIES

Many studies over the past quarter century have found that designated historic properties appreciate at a somewhat greater rate than non-designated properties.¹ Most studies employed a methodology similar to the one used here: they present a non-scientific comparison setting forth the evolution of house prices for historic districts and non-historic districts, based either on sales information or on appraisal data. As with this study, these studies have looked mainly to changes in average house prices for historic district properties and non-historic properties, and have drawn tentative conclusions that historic designation has a positive effect on house prices. However, a few studies have gone beyond this approach and have accounted for other variables such as property and house characteristics or location that may also affect the price of houses in a given neighborhood.² The models presented by this latter group of studies have an additional

¹ See, e.g., Donovan D. Rypkema, *Virginia's Economy and Historic Preservation: The Impact of Preservation on Jobs, Business, and Community Development* (Preservation Alliance of Virginia 1995), reprinted in 1 DOLLARS & SENSE OF HIST. PRESERVATION, occasional series (Nat'l Trust for Hist. Preservation, no date), at 1; ELIZABETH MORTON, HISTORIC DISTRICTS ARE GOOD FOR YOUR POCKETBOOK: THE IMPACT OF LOCAL HISTORIC DISTRICTS ON HOUSE PRICES IN SOUTH CAROLINA (S.C. Dept. of Archives & History, 2000); John A. Kilpatrick, *Impact of Historic District Designation on House Prices in Columbia, South Carolina* (S.C. Dept. of Archives & History, research monograph, 1995); Ann Bennett, *The Economic Benefits of Historic Designation, Knoxville, Tennessee* (Knoxville Knox County Metro. Comm'n 1996), reprinted in 15 DOLLARS & SENSE OF HIST. PRESERVATION, occasional series (Nat'l Trust for Hist. Preservation, 1998), at 1; Jo Ramsay Leimenstall, *Assessing the Impact of Local Historic Districts on Property Values in Greensboro, North Carolina*, 14 DOLLARS & SENSE OF HIST. PRESERVATION, occasional series (Nat'l Trust for Hist. Preservation 1998), at 1.

A few researchers have identified mixed or negative results in their property comparisons. See, e.g., Paul K. Asabere *et al.*, *The Adverse Impacts of Local Historic Designation: The Case of Small Apartment Buildings in Philadelphia*, 8 J. REAL EST. FIN. & ECON. 225 (1994) (focusing on small multi-family housing); Peter V. Schaeffer & Cecily A. Millerick, *The Impact of Historic District Designation on Property Values: An Empirical Study*, 5 ECON. DEV. Q. 301 (1991) (Chicago study found that while National Register districts increased in value, local districts did not).

² See, e.g., Deborah Ford, *The Effect of Historic District Designation on Single-Family Home Prices*, 17 J. AM. REAL EST. & URBAN ECON. ASS'N 353 (1989) (Baltimore, Maryland); Dennis E. Gale, *The Impacts of Historic District Designation*, 57 J. AM. PLANNING ASS'N 325 (1991) (examining 3 Washington, D.C., historic districts, and finding less post-designation decline in values in historic districts than in other D.C. neighborhoods); Paul K. Asabere & Forrest E. Huffman, *Historic Designation and Residential Market Values*, APPRAISAL J., July 1994, at 396; Patrick Haughey & Victoria Basolo, *The Effect of Dual Local and National Register Historic District Designations on Single-Family Housing Prices in New Orleans*, APPRAISAL J., July 2000, at 283; Robin M. Leichenko *et al.*, *Historic Preservation and Residential Property Values: An Analysis of Texas Cities*, 38 URBAN STUDIES 1973 (2001) (providing a useful discussion of prior studies, and comparing property values for historic districts in nine Texas cities).

element of statistical reliability.

Researchers identified only one similar comparative study evaluating Florida historic properties. A 1997 report prepared for the Preservation Foundation of Palm Beach, suggested that the designation of properties within the Town of Palm Beach added some 10-20% to property values.³ The evaluation was made based on residential property sales comparisons from 1990 through 1997.

Historic preservation has long been a valuable tool for promoting urban redevelopment. Other studies have noted the positive impacts of historic preservation efforts on local communities in encouraging the revitalization of older neighborhoods, while also noting the risks that the resulting gentrification, by removing affordable housing, can displace older residents.⁴

METHODOLOGY

The cities used for this property values analysis were largely self-selecting. For the most part they represented Florida cities with significant historic preservation programs which responded substantively to survey requests by project staff in fall 2001. Because of the GIS nature of the project methodology, it was a requirement that cities be located in counties for which Geoplan had GIS data, or that the cities make available this data themselves.⁵ Project staff used GIS because it allows map data to link to specific parcel data and thus makes possible a large-scale search of neighborhoods within the property appraisal databases which have been made publicly available by the Florida Department of Revenue.⁶

Following a series of site-visits and interviews, project staff worked with local officials and staff to identify at least one neighborhood in the same community that was substantially comparable in terms of geography, demographics and economics. Each of the identified districts was scrutinized using Census block data to ensure that they were relatively comparable during the course of the period investigated.

³ DIANE JENKINS, A SUMMARY REPORT CONCERNING THE IMPACT OF LANDMARKING ON RESIDENTIAL PROPERTY VALUES, PALM BEACH, FLORIDA (1997).

⁴ See David Listokin *et al.*, *The Contributions of Historic Preservation to Housing and Economic Development*, 9 HOUSING POL'Y DEBATE 431 (1998) (noting that rehabilitation is often a catalyst that helps improve neighborhoods, and discussing the effects of the federal rehabilitation tax credit in helping to encourage local rehabilitation); Christopher T. Wojno, *Historic Preservation and Economic Development*, 5 J. PLANNING LITERATURE 296 (1991).

⁵ The Geoplan Center is a GIS research and teaching laboratory in the Department of Urban and Regional Planning at the University of Florida College of Design, Construction and Planning.

⁶ Geoplan also makes this information accessible as part of its Florida Geographic Data Library. It is available online at: <http://www.fgdl.org/> (last visited Sept. 2002).

Project collaborators at Geoplan first assembled GIS shapefile⁷ data for specific districts or neighborhoods with the cities selected for property values analysis. They then used the local parcel shapefiles to query a subset of records within county property appraisal records for the years 1992, 1997 and 2001. This involved considerable effort because parcel numbering formats vary from county to county. Some counties use extra prefix numbers while others use embedded spaces or dashes for delineation. Furthermore, these formats change over time. It was thus necessary to ensure that parcel numbers for each of the three databases were provided in the same format.

The combination of the three appraisal cycles over a decade provided some showing of the development of property values during a period of time. Once subsets of county appraisal data were created, these were combined into a single database providing assessed values for all three appraisal periods for each parcel within the district or neighborhood. To refine and correct the comparison, the parcels were then sorted first, by their respective “Department of Revenue Codes” (land use) and secondly, by “Use Descriptions.”⁸ It was then possible to provide average values for parcels identified as “Residential” in nature. Subsequent analysis also evaluated single family residential parcels, distinct from all residential parcels.

Having identified residential parcels, project staff then computed the changes in average assessed value from 1992 to 1997, from 1997 to 2001 and from 1992 to 2001. Measured against the average value for the property, the average change yielded a percentage change in value for the district. Three separate searches were done. The first search tracked changes in assessed values for all property within the district, including institutional or commercial property. The second search tracked changes for all residential property, and the third measured changes in single family residential property. One comparison of solely commercial property in Ybor City and West Tampa was included, as well as one intra-district survey of the four quadrants of Springfield Historic District in Jacksonville.

⁷ “Shapefile” is a technical name for the GIS format for storing specific location, shape and attribute information for geographic features. Each parcel of property in an appraiser’s database represented one shapefile, and was linked to the relevant information identifying the parcel, its location, ownership, appraised values etc. The information allowed both mapping and data search for each parcel.

⁸ The Florida Department of Revenue (DOR) Codes are number codes which provide an official land use classification for property tax purposes. This study focused on the following DOR Codes and Use Descriptions: Code 1 (Single Family Residential), Code 8 (Multi-Family Less Than 10 Units), Code 03 (Multi-Family 10 Units or More), and Codes 11-39 (Improved Commercial). These DOR Codes and Use Descriptions are employed by each county property appraiser throughout Florida under Rule 12D-8.008(2)(c), Florida Administrative Code.

Cities Reviewed	Historic Districts	Inventory of Comparison Neighborhoods
Gainesville:	Northeast Hist. Dist. (Nat'l Register & local)	Golfview neighborhood
	Pleasant Street Hist. Dist. (N.R. & local)	N.W. 5 th Ave. neighborhood
Ocala:	Ocala Hist. Dist. (N.R. & local)	Woodfields neighborhood The Pines neighborhood
	Tuscawilla Hist. Dist. (N.R. & local)	East Tuscawilla neighborhood just east of Tuscawilla Hist. Dist.
Jacksonville:	Riverside/Avondale Hist. Dist. (N.R. & local)	Ortega neighborhood San Marco neighborhood
	Springfield Hist. Dist. (4 quadrants) (N.R. & local)	
Tampa:	Hyde Park Hist. Dist. (N.R. & local)	Davis Island
	Ybor City local hist. dist. (N.R. & local)	Eastern Ybor City (part of Nat'l Register district, not local district)
	Ybor City commercial (N.R. & local)	West Tampa commercial
St. Petersburg:	North Shore Hist. Dist. (local)	Lakewood Estates subdivision Old North East Park neighborhood Placido Bayou neighborhood
	Historic Kenwood District (local)	Meadowlawn neighborhood
	Roser Park Hist. Dist. (local)	Bartlett Park neighborhood
	Round Lake Hist. Dist. (local)	Euclid St. Paul neighborhood

Cities Reviewed	Historic Districts	Inventory of Comparison Neighborhoods
Lakeland:	East Lake Morton Hist. Dist. (N.R. & local)	Biltmore neighborhood
	Dixieland Hist. Dist. (local)	Camphor neighborhood
	Beacon Hill Hist. Dist. (N.R. & local)	Southwest neighborhood
	South Lake Morton Hist. Dist. (N.R. & local)	Cumberland neighborhood Lake Hollingsworth neighborhood
West Palm Beach:	Northboro Park Hist. Dist. (local)	Northwood Hills neighborhood
	Flamingo Park Hist. Dist. (local)	Sunshine Park neighborhood
Lake Worth:	Old Lucerne Hist. Dist. (local)	Neighborhood immediately north

RESULTS

GAINESVILLE COMPARISONS

1. Northeast Historic District and Golfview Neighborhood.

Two Gainesville historic districts were examined. The first, the Northeast Historic District, is one of Gainesville's oldest and best-preserved residential neighborhoods. Consisting of some 160 acres, this district has homes in a variety of styles dating from around 1875 through 1920. The Northeast Historic District has been on the National Register since 1980 and also enjoys local protection. It has benefited from much rehabilitation activity during the past decade.⁹

Single family residential property was compared with similar property in the Golfview Estates subdivision, a single-family residential neighborhood located in southwest Gainesville, near the University of Florida campus. Its development dates from about 1950 through 1980.

TABLE 7-1
Percentage Change in Assessed Values
Northeast Historic District and Golfview, 1992-2001

Single Fam. Resid.	%Change 92-97	%Change 97-01	%Change 92-01
Northeast Hist. Dist.	35.74	23.42	67.53
Golfview	20.20	26.89	52.51

The results for this comparison (Table 7-1) show that the single family residential property in the Northeast Historic District increased significantly faster during the period 1992-97 than in the comparison neighborhood. For the second half of the time period, the comparison neighborhood increased at a somewhat higher rate than in the historic district. Nevertheless, the historic district witnessed significantly higher increases over the entire ten-year period.

2. Pleasant Street Historic District and 5th Avenue Neighborhood.

The Pleasant Street Historic District was the second Gainesville historic district examined. Pleasant Street is Gainesville's oldest African-American residential neighborhood, with some 255 structures dating from 1875 through the 1930's. Pleasant Street has been listed on the National Register since 1989, and also enjoys local protection. This neighborhood struggled in the years following World War II with incompatible land uses and degradation of its housing stock, but has benefited from new investment since its designation.

⁹ For information about Gainesville's historic districts, see BEN PICKARD, *HISTORIC ALACHUA COUNTY AND OLD GAINESVILLE: A TOUR GUIDE TO THE PAST* 10-61 (2001); MORTON D. WINSBERG, *FLORIDA'S HISTORY THROUGH ITS PLACES* 2-4 (1995), available online at <http://www.freac.fsu.edu/HistoricPlaces/Atlas.html> (last visited Sept. 2002).

As a comparison neighborhood to the Pleasant Street Historic District, the adjoining Fifth Avenue neighborhood was selected. The Fifth Avenue neighborhood is a mixed use neighborhood sharing many of the economic and demographic characteristics of Pleasant Street Historic District.

TABLE 7-2
Percentage Change in Assessed Values
Pleasant Street Historic District and 5th Avenue neighborhood

Single Fam. Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Pleasant Street H.D.	21.44	22.01	48.17
5 th Avenue	15.07	22.57	41.04

The results of this comparison, as seen in Table 7-2, show that the Pleasant Street Historic District and 5th Avenue neighborhood enjoyed similar increases in assessed values, with the historic district performing better in the period from 1992-97. The comparison neighborhood, in turn, slightly outperformed the historic district in the period following 1997.

JACKSONVILLE COMPARISONS

1. Riverside/Avondale Historic District with Ortega and San Marco Neighborhoods.

Jacksonville's Riverside/Avondale Historic District is a fashionable residential neighborhood situated along the St. Johns River near downtown Jacksonville. The National Register and local district contains around 3,000 homes dating from the 1870's through the 1930's.¹⁰

The Ortega and San Marco neighborhoods, which were used in this comparison, were both developed beginning in the 1920's and have since remained fashionable waterfront neighborhoods. The comparison (see Table 7-3, below) shows that assessed values increased in all three neighborhoods, with Riverside/Avondale in the mid-range over the ten-year period.

¹⁰ For further information about Jacksonville's historic districts and neighborhoods, including Riverside/Avondale, Ortega, San Marco and Springfield, see WAYNE W. WOOD, JACKSONVILLE'S ARCHITECTURAL HERITAGE: LANDMARKS FOR THE FUTURE (1989); cf. WINSBERG, *supra* note 8, at 35, 40 (discussing the Avondale and Riverside National Register Districts).

TABLE 7-3
Percentage Change in Assessed Values
Riverside/Avondale H.D., Ortega and San Marco

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Riverside/Avondale HD	13.77	32.27	50.49
Ortega	14.12	22.77	40.11
San Marco	22.09	37.60	67.99

2. Springfield Historic District: Intra-District Comparison.

The Springfield Historic District, a nationally and locally designated historic district, has been the focus of sustained local investment by the city of Jacksonville since 1998. The goal of the city's initiative has been to promote restoration of this formerly genteel neighborhood. The city's redevelopment efforts have concentrated on improving infrastructure and providing incentives and assistance for home ownership. The city has concentrated its efforts by beginning in 1998 with the Southwest Quadrant (the area west of Main Street and south of 8th Street), and shifting to the Southeast Quadrant in 2000. These efforts have resulted in significant improvement in both targeted areas (see Table 7-4, below), and the benefits of improvement are also being felt in the northern parts of the district.

TABLE 7-4
Percentage Change in Assessed Values
Springfield Historic Districts

Springfield Hist. Dist. Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Southwest Quadrant	3.26	35.83	40.25
Southeast Quadrant	-4.47	25.40	19.79
Northwest Quadrant	8.07	29.33	39.77
Northeast Quadrant	-1.70	24.77	22.65

OCALA COMPARISONS

1. Ocala Historic District and Woodfields & The Pines neighborhoods.

The Ocala Historic District, situated along Fort King Street, is one of Ocala's most fashionable neighborhoods, with houses dating from around 1880 through 1930.¹¹ On the National Register since 1984, the Ocala Historic District also benefits from local protection.

Both Woodfields and The Pines subdivisions are post-war residential neighborhoods lying immediately south and west of the Ocala Historic District.

TABLE 7-5
Percentage Change in Assessed Values
Ocala Historic District and Woodfields and The Pines neighborhoods

Single Fam. Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Ocala Hist. Dist.	22.09	37.60	67.99
Woodfields	2.38	16.35	19.12
The Pines	9.62	20.42	32.00

2. Tusawilla Park Historic District and East Tusawilla Neighborhood.

Tusawilla Park Historic District is a small residential neighborhood, containing houses from the 1870's through the 1930's. It is listed on the National Register and is also a local historic district. A comparison was made with East Tusawilla, a small residential area lying immediately to the east of the historic district.

TABLE 7-6
Percentage Change in Assessed Values
Tusawilla Park Historic District and East Tusawilla neighborhood

Single Fam. Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Tusawilla Park H.D.	18.76	20.31	42.89
East Tusawilla	-2.26	26.70	23.84

¹¹ See WINSBERG, *supra* note 8, at 79 (discussing both the Ocala and Tusawilla Park Historic Districts).

TAMPA COMPARISONS

1. Hyde Park Historic District and Davis Island.

The Hyde Park Historic District is Tampa's oldest and best-preserved residential neighborhood. On the National Register since 1985, this district contains some 1700 structures dating mainly from the 1880's through the 1930's.¹² The Hyde Park Historic District was compared with the residential neighborhood on Davis Island, which faces it across Tampa Bay. These two neighborhoods are similarly situated geographically and economically, making this an especially interesting comparison, as can be seen from Table 7-7, below.

TABLE 7-7
Percentage Change in Assessed Values
Hyde Park Historic District and Davis Island

Single Fam. Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Hyde Park Hist. Dist.	24.33	40.40	74.56
Davis Island	19.32	33.99	59.88

2. Ybor City Historic District and West Tampa Commercial.

Ybor City Historic District is a manufacturing, residential and commercial area famous for its cigar factories. Settled by immigrants, it has buildings dating from the 1880's through the early twentieth century.¹³ Today this National Register district is a vibrant mixed use commercial and entertainment district. This comparison focused on commercial property within the district, and compared the changes in assessed values with those for commercial property in West Tampa. The comparison demonstrates the success of Ybor City's redevelopment and renaissance, as can be seen from Table 7-8, below.

TABLE 7-8
Percentage Change in Assessed Value
Ybor City and West Tampa Commercial Property

Improved Commercial	% Change 92-97	% Change 97-01	% Change 92-01
Ybor City Hist. Dist.	50.92	66.81	151.74
West Tampa	-3.07	28.85	24.89

¹² See *id.* at 57 (discussing the Hyde Park Historic District).

¹³ See *id.* at 60 (discussing Ybor City).

ST. PETERSBURG COMPARISONS

1. North Shore Historic District and Lakewood Estates, Northeast Park and Placido Bayou neighborhoods.

North Shore Historic District, a locally designated historic district, is one of St. Petersburg's oldest traditional residential neighborhoods. Developed from 1911 onward, it features a wide mix of home styles, including a variety of home sizes and small multi-family residences.¹⁴ This neighborhood was compared with three others: Lakewood Estates, a subdivision in south St. Petersburg mainly developed from 1950 through the 1980's; Northeast Park, a mainly single-family neighborhood developed in the 1950's and 1960's; and Placido Bayou, another single-family subdivision developed mainly from 1950-1990.

As Table 7-9 shows, the North Shore Historic District demonstrated greater increases in assessed values for residential property than did both Lakewood Estates and Northeast Park over the ten-year period. Although the historic district outperformed Placido Bayou for the final period from 1997-2001, assessed values increased significantly higher in Placido Bayou for the earlier period from 1992-97.

TABLE 7-9
Percentage Change in Assessed Values
North Shore H.D. and Lakewood Estates, Northeast Park & Placido Bayou

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
North Shore H.D.	17.42	28.81	51.24
Lakewood Estates	10.95	14.72	27.28
Northeast Park	11.63	19.43	33.32
Placido Bayou	54.81	17.43	81.80

2. Historic Kenwood and Meadowlawn neighborhood.

Historic Kenwood is a locally designated historic district in central St. Petersburg with small homes and apartments dating mainly from 1920 through around 1940. This district was compared with the Meadowlawn neighborhood, a suburban development in north St. Petersburg. Single family residential assessed values increased at a markedly higher rate in the historic district over the period from 1992-2001 than in the comparison neighborhood (see Table 7-10, below).

¹⁴ For more information on St. Petersburg neighborhoods, including both its historic districts and non-historic neighborhoods, see, *e.g.*, the summary of the Neighborhood Partnership and tour of St. Petersburg neighborhoods, available at: <http://www.stpete.org/npart.htm> (last visited Sept. 2002).

TABLE 7-10
Percentage Change in Assessed Values
Historic Kenwood and Meadowlawn neighborhood

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Historic Kenwood	14.17	26.82	44.80
Meadowlawn	4.71	15.77	21.22

3. Roser Park Historic District and Bartlett Park Neighborhood.

Roser Park was developed after 1910, and first designated a local historic district in 1987. Since adoption of a neighborhood plan in 1993, this small district has seen substantial rehabilitation financed both by private and public investment. Bartlett Park is a traditional neighborhood, with a mix of housing dating from both before and after the World War II. Bartlett Park has also benefited from substantial public and private investment since adoption of a neighborhood plan in 1993. As can be seen from Table 7-11, below, both neighborhoods have seen dramatic increases in property values over the past decade reflecting the resurrection of both these neighborhoods from decay.

TABLE 7-11
Percentage Change in Assessed Values
Roser Park Historic District and Bartlett Park

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Roser Park H.D.	91.56	49.45	186.29
Bartlett Park	54.59	45.92	125.59

4. Round Lake Historic District and Euclid St. Paul Neighborhood.

Round Lake Historic District, another locally designated historic district in central St. Petersburg, is an older neighborhood located to the west of the North Shore Historic District. Developed from about 1910 through 1940, this neighborhood features both single family residences and small multi-family housing. Round Lake was compared with the nearby Euclid St. Paul, a traditional neighborhood developed mainly from 1930 through 1960. Assessed values in the comparison neighborhood rose significantly higher during the period from 1992-97. However, Round Lake assessed values increased by a greater rate in the subsequent period from 1997-2001 (see Table 7-12, below).

TABLE 7-12
Percentage Change in Assessed Values
Round Lake Historic District and Euclid St. Paul

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Round Lake H.D.	11.43	36.54	52.15
Euclid St. Paul	17.29	24.87	46.47

LAKELAND COMPARISONS

1. East Lake Morton Historic District and Biltmore Neighborhood.

The East Lake Morton Historic District, on the National Register since 1993, is one of Lakeland's earlier middle-class neighborhoods, with most houses dating from 1900 through 1940.¹⁵ This district was compared with the Biltmore neighborhood, a traditional neighborhood, developed subsequently, and lying immediately to the east of the historic district. The comparison showed both neighborhoods increasing at a similar rate, with a slightly higher rate for East Lake Morton Historic District (see Table 7-13, below).

TABLE 7-13
Percentage Change in Assessed Values
East Lake Morton Historic District and Biltmore

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
East Lake Morton H.D.	14.07	16.71	33.14
Biltmore	14.03	13.56	29.49

2. Dixieland Historic District and Camphor Neighborhood.

The Dixieland Historic District is a locally designated historic district. This modest mixed-use neighborhood features a variety of larger and smaller houses mainly in bungalow style, developed since the 1920's.¹⁶ The historic district was compared with the Camphor neighborhood, situated to its south. An analysis of assessed values for both neighborhoods shows a moderately higher rate of increase for the historic district (see Table 7-14, below).

¹⁵ See WINSBERG, *supra* note 8, at 103-04 (discussing Lakeland historic districts on the National Register, including East Lake Morton, Beacon Hill and South Lake Morton).

¹⁶ Information about the Dixieland Historic District, and other Lakeland historic districts, is available from the city community development department, at <http://communitydevelopment.lakelandgov.net/Dist.Sum.html> (last visited Sept. 2002).

TABLE 7-14
Percentage Change in Assessed Values
Dixieland Historic District and Camphor

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Dixieland Hist. Dist.	9.94	13.57	24.86
Camphor	6.51	9.28	16.40

3. Beacon Hill Historic District and Southwest Neighborhood.

Beacon Hill Historic District, another National Register district, is a small neighborhood of single family homes dating from 1920 through around 1940. This district was compared with the larger Southwest neighborhood, developed in large part from the 1950's through the 1970's. The comparison for these two neighborhoods shows modest increases in assessed values, with the historic district increasing at a higher rate from 1992-97, while the comparison neighborhood showing similar increases following 1997 (see Table 7-15, below).

TABLE 7-15
Percentage Change in Assessed Values
Beacon Hill Historic District and Southwest neighborhood

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Beacon Hill Hist. Dist.	11.12	9.28	21.43
Southwest	10.19	11.23	22.57

4. South Lake Morton Historic District and Cumberland & Lake Hollingsworth Neighborhoods.

South Lake Morton Historic District, a National Register district, is a residential middle class neighborhood dating from 1900 through about 1940. South Lake Morton adjoins the campus of Florida Southern College, which is itself an historic district because of its distinctive Frank Lloyd Wright architecture. The Cumberland neighborhood, to the east of South Lake Morton, is an older single family residential neighborhood, with homes dating from 1920 through the early 1950's. Lake Hollingsworth neighborhood, to the south, sits along the lake of the same name, and also contains mainly single family houses dating from the 1930's through the 1960's. A comparison of assessed values showed that homes in the historic district increased at a greater rate throughout the ten-year period from 1992-2001 (see Table 7-16, below).

TABLE 7-16
Percentage Change in Assessed Values
South Lake Morton Historic District and
Cumberland & Lake Hollingsworth neighborhoods

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
South Lake Morton H.D.	19.14	16.93	39.31
Cumberland	12.85	13.43	28.01
Lake Hollingsworth	15.25	11.53	28.55

WEST PALM BEACH COMPARISONS

1. Northboro Park Historic District and Northwood Hills Neighborhood.

The Northboro Park Historic District is a residential neighborhood in the north of West Palm Beach. This local historic district lies to the immediate north of the Old Northwood National Register District, and is an upper middle class development dating from 1920 through 1940.¹⁷ The comparison neighborhood, Northwood Hills, is a middle class residential neighborhood with single family homes dating from the 1930's through the 1950's.

A comparison of assessed values in these neighborhoods shows that property values in the historic district increased at a substantially higher rate during the entire ten-year period from 1992-2001 (see Table 7-17, below).

TABLE 7-17
Percentage Change in Assessed Values
Northboro Park Historic District & Northwood Hills

Single Family Resid.	% Change 92-97	% Change 97-01	Change 92-01
Northboro Park Hist. Dist.	33.73	47.41	97.13
Northwood Hills	11.80	25.31	40.10

¹⁷ Information about West Palm Beach historic districts and their development is available from the West Palm Beach Neighborhood Planning Department, at <http://www.cityofwpb.com/neighborhoods/historic.htm> (last visited Sept. 2002).

2. Flamingo Park Historic District and Sunshine Park Neighborhood.

Flamingo Park Historic District, a local district since 1994, was listed on the National Register in 2000. This historic residential neighborhood features a variety of mainly single family residences dating from 1920 through 1940.¹⁸ Sunshine Park, a smaller adjacent neighborhood was developed during the same period and shares many of the characteristics of Flamingo Park. Both districts witnessed impressive increases in assessed values over the ten-year period, reflecting their proximity to new mixed use development downtown which made them attractive and convenient. Though the designated district showed higher increases for the period from 1992-97, the comparison neighborhood increased by an even greater margin during the period from 1997-2001 (see Table 7-18, below).

TABLE 7-18
Percentage Change in Assessed Values
Flamingo Park Historic District & Northwood Hills

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Flamingo Park Hist. Dist.	27.78	50.93	92.86
Sunshine Park	16.58	69.09	97.12

LAKE WORTH COMPARISON

1. Old Lucerne Historic District and adjacent North Lake Worth Neighborhood.

The Old Lucerne Historic District is a locally designated residential neighborhood along the Intracoastal Waterway. It was compared with the adjacent North Lake Worth neighborhood, which lies immediately north of the historic district. The comparison (see Table 7-19, below) shows that both neighborhoods increased at similar rates over the ten-year period, with a slightly higher rate of increase for the historic district.

TABLE 7-19
Percentage Change in Assessed Values
Old Lucerne Historic District and North Lake Worth

Single Family Resid.	% Change 92-97	% Change 97-01	% Change 92-01
Old Lucerne Hist. Dist.	20.78	28.35	55.03
North Lake Worth	18.79	23.82	47.09

¹⁸ See *id.*

INITIAL EVALUATION

This initial comparative study reviews the effects of historic preservation on specific neighborhoods in the selected cities, which form a fair sample of large and medium-sized communities in the Florida peninsula. This review of assessed values was broad, examining more than 28,000 parcels of residential property. To this extent, the findings of this study do reflect the relative success of historic preservation in the selected communities.

One important conclusion is clear: in no case reviewed here do historic preservation programs so “burden” property as to decrease property values. Indeed, in the vast majority of cases, designated residential properties performed as well as or better than comparable undesignated properties. This was especially the case for single family residential property, but also true for small-scale multi-family residential property (see tables in Appendix B). This study shows that local neighborhood historic preservation efforts may justly be considered as “value-added.” Such a conclusion is especially significant given the legal implications of government land use regulations, which are often alleged to “burden” the use of real property or impose some “inordinate economic burden” on the landowner.¹⁹ If local governments are able to demonstrate that any incidental “burdens” associated with the protection of historic resources are accompanied by an accompanying “benefit” in the form of increased property values, this may form a valuable insulation both against Fifth Amendment Takings challenges and against challenges brought under Florida’s Private Property Rights Protection Act.²⁰

¹⁹ Florida’s Private Property Protection Act, Section 70.001, Florida Statutes, was enacted in 1995, and creates a new cause of action whenever government action “has inordinately burdened an existing use of real property.” Under the Act, the landowner may be entitled to relief, including loss to the fair market value of the property resulting from the government action. *Id.* The government actions encompassed by the Act would include land use decisions such as rezonings, comprehensive plan amendments, designation of landmarks or historic districts and enforcement of these regulations. *Id.* § 70.001(3)(d).

As used in the Private Property Protection Act, the term “inordinate burden” draws from constitutional takings jurisprudence and is defined to mean that the landowner is permanently unable “to attain the reasonable, investment-backed expectations” for the existing land use, or that the only permitted land uses are unreasonable and are such “that the property owner bears permanently a disproportionate share of a burden imposed for the good of the public.” *Id.* § 70.001(3)(e).

This study suggests that there are demonstrable benefits attached to historic designation and protection, at least as applied to a district as a whole. In the general course of events, historic designation and protection do not depress property values, and are far more likely to increase them more than comparable non-designated properties.

²⁰ For more recent analysis of the Private Property Protection Act, see Julian Conrad Juergensmeyer, *Florida’s Private Property Rights Act: Does It Inordinately Burden the Public Interest?*, 48 FLA. L. REV. 695 (1996); Roy Hunt, *Property Rights and Wrongs: Historic Preservation and Florida’s 1995 Private Property Rights Protection Act*, 48 FLA. L. REV. 709 (1996) (arguing that the benefits provided to property owners by historic preservation outweigh any incidental burdens imposed).

As for Fifth Amendment Takings, the classic test identified by the U.S. Supreme Court in *Penn Central Transportation Co. v. New York City*, 438 U.S. 104, 124-25 (1978), applied a three-factor balancing test to determine if government regulation amounted to a taking of property: 1) the economic impact of the law on the petitioner; 2) the extent to which the law interferes with reasonable investment-backed expectations; and 3) the character of the regulation. *Cf. Graham v. Estuary Properties, Inc.*, 399 So. 2d 1374, 1380 (Fla.), *cert. denied*, 454 U.S. 1083 (1981) (providing a similar analysis test to show whether a taking had occurred).

Florida courts have never found that historic designation in itself constitutes a taking of property under the Fifth Amendment. *See Metropolitan Dade County v. P.J. Birds, Inc.*, 654 So. 2d 170 (Fla. 3d DCA 1995); *Estate of Tippett v. City of Miami*, 645 So. 2d 533 (Fla. 3d DCA 1994).

In addition, a demonstration that historic preservation does not harm, but actually benefits property values, may help build legitimacy and acceptance among property owners within a district. These demonstrable benefits will contribute to the success of historic preservation in Florida.

SUGGESTIONS FOR FURTHER STUDY

This small initial study should be followed by others employing a similar methodology in a more comprehensive fashion. Ideally, a city could evaluate the performance of all neighborhoods within its boundaries. Property in the historic districts could be evaluated against values in the city as a whole, as well as against comparable neighborhoods.

This study also revealed limits to the data contained in the appraisal databases made publicly available through the Department of Revenue. Attempts to supplement this study by including a comparative analysis that factored in additional variables such as house and lot size and other improvements for two selected communities (Gainesville and Tampa) were frustrated by the incompleteness of the data in the freely accessible Department of Revenue databases. In a future study, researchers would probably need to acquire this data directly from the property appraisers to conduct such an empirical analysis that could reveal the actual “value added” by historic designation.

The property appraisal database also tracks past sales of individual parcels, and provides the sales prices. Average past sales values within a district during the time period of the study could also be evaluated and compared with those of a target comparison neighborhood. Introduction of sales prices could lead to more a more accurate idea of the real value of property within a district.

Several hindrances exist to performing this study on a statewide level. First, GIS data are incomplete for several counties, missing for others, and in incompatible formats for still other counties. Some counties do not release their GIS data, but offer it for sale for prices which may make such a study impractical unless the GIS shapefile data can be secured by the local government. Finally, this method of study relying on property appraisal records may not be possible throughout the State for the period prior to about fifteen years ago. This lack of connection with earlier appraisals is the result of changes both to the methods of appraisal and the ways that parcels are recorded. These changes both make it more difficult to get parcel data more than fifteen years old, and also sometimes make the older records less compatible with later data. However, property appraisers statewide are increasingly making their information accessible and searchable, and future studies will benefit from this improvement, especially with regard to recent and future appraisals.

Nevertheless, the ability to use mapping techniques to link parcels with their appraised values offers a great opportunity to preservationists. GIS technology is employed by planners in many other areas, including land use, transportation, environmental planning, as well as sciences. Indeed, it is already an indispensable tool to these fields. Even within the field of historic preservation, most of the district maps are now drawn using GIS technology. As this study

shows, however, GIS technology allows one to do more than draw maps. It also allows for sophisticated parcel-related searches. This ability to link the GIS shapefiles with other information recorded by parcel - as was done with the property appraisal databases in this study - makes it possible to refine searches and manipulate databases to ensure that similarly situated property is considered. The mapping technology then makes possible a more easily comprehensible presentation of the survey results.

