



Shaping Boston: Exploring Trends in Land Use & Land Value

October 13th, 2023
Research Division

Table of Contents

1. Snapshot of current land use patterns

- Share of parcel land area by category and neighborhood
- Tax-exempt parcel land area by care and custody and neighborhood

2. Land use trends over time

- Share of parcel land area by category over time
- Percentage change in parcel land area by category and neighborhood

3. Snapshot of current land value patterns

- Median parcel assessed land values by category and neighborhood

4. Land value trends over time

- Median assessed land values citywide by category over time
- Percentage change in median assessed land values by category and neighborhood

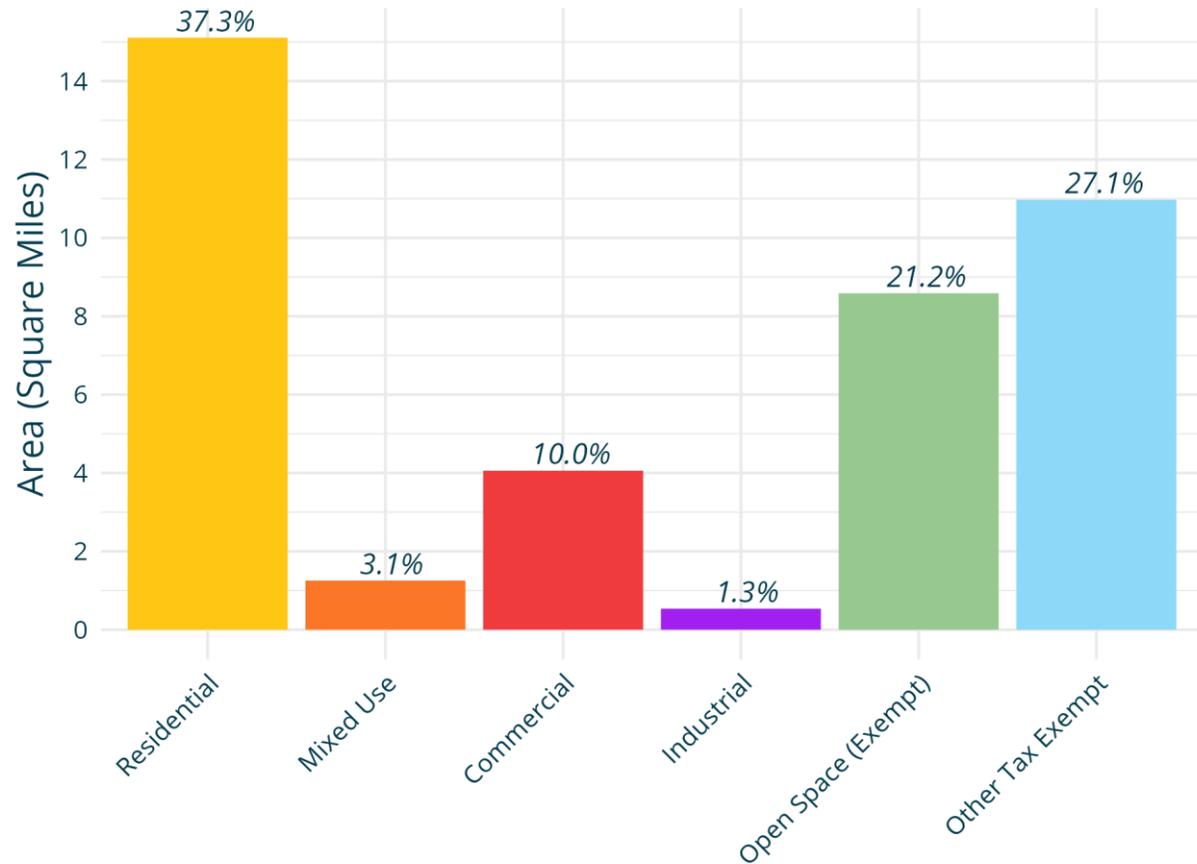
1.

Snapshot of current land use patterns



Nearly half of parcel land area in Boston is tax-exempt. Over a third of parcel land area is residential.

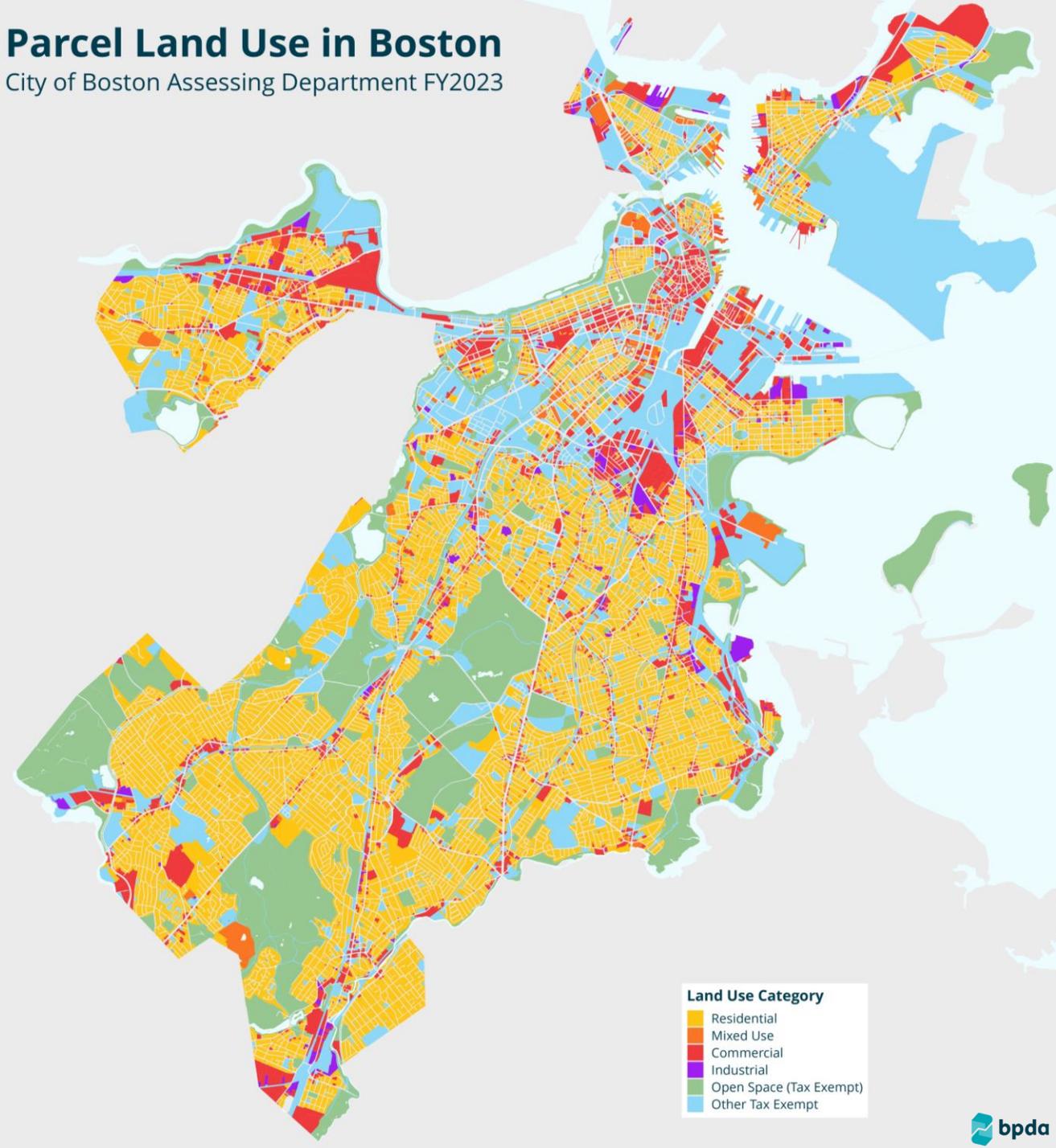
Citywide Parcel Land Area by Use Category



Source: City of Boston Assessing Department FY2023, BPDA Research Division Analysis

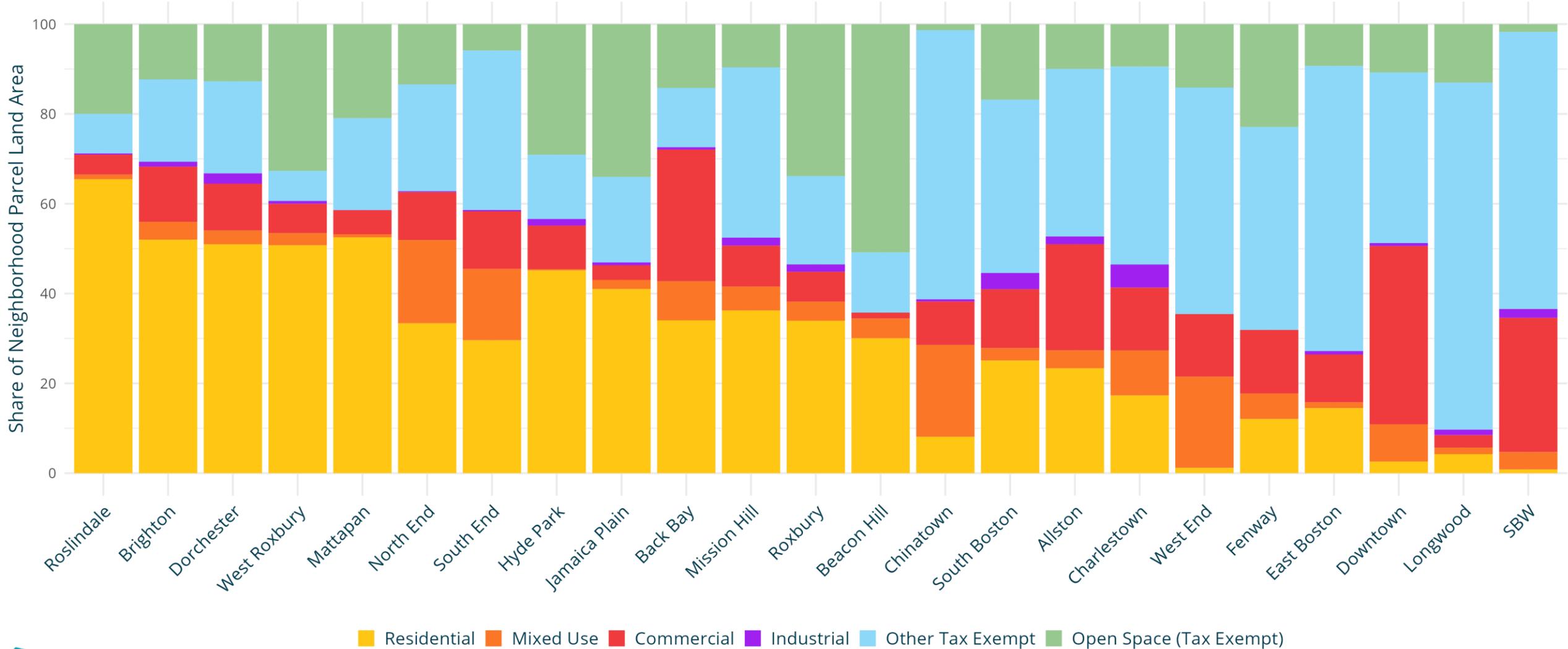
Parcel Land Use in Boston

City of Boston Assessing Department FY2023



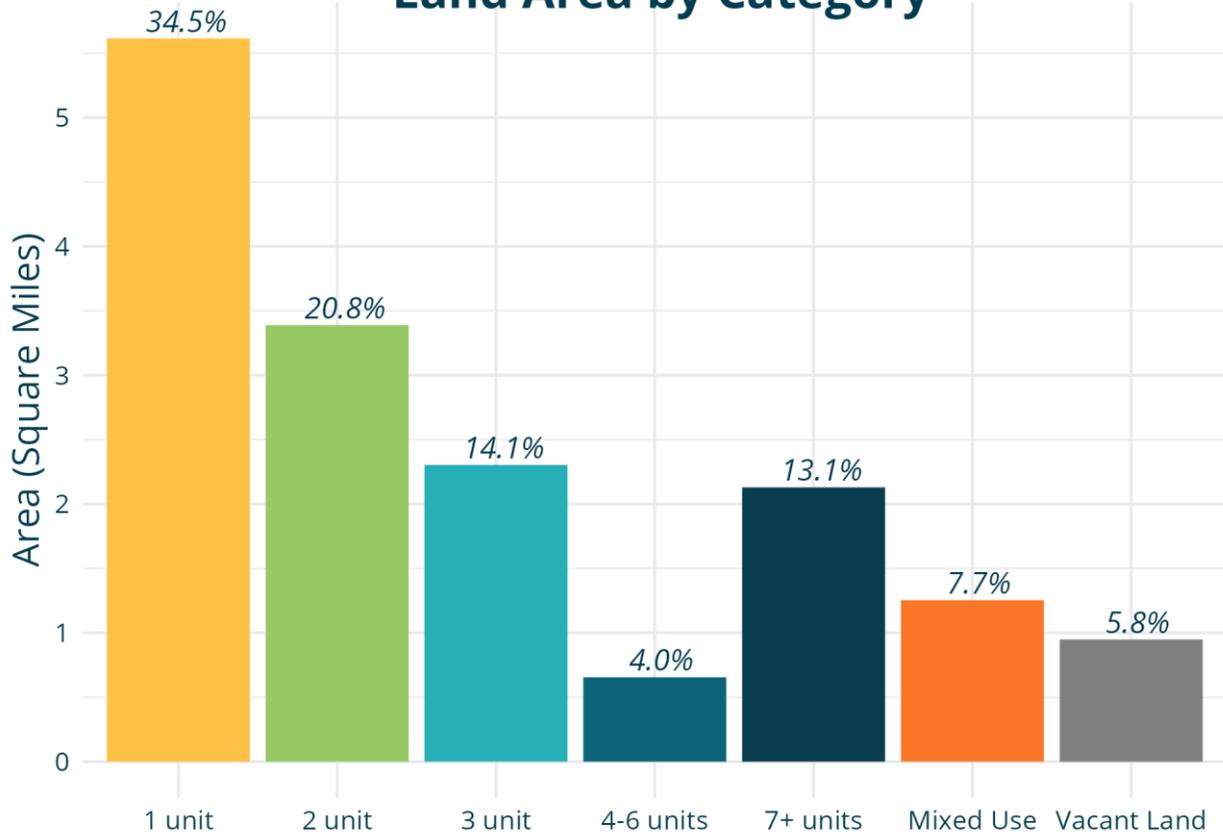
Neighborhoods furthest from downtown are mostly residential. However, the North End & South End have larger shares of residential and mixed-use land, relative to nearby neighborhoods.

Parcel Land Area by Category and Neighborhood



More than a third of residential or mixed-use land is dedicated to single-family homes, with significantly less allocated to 4-6 unit parcels.

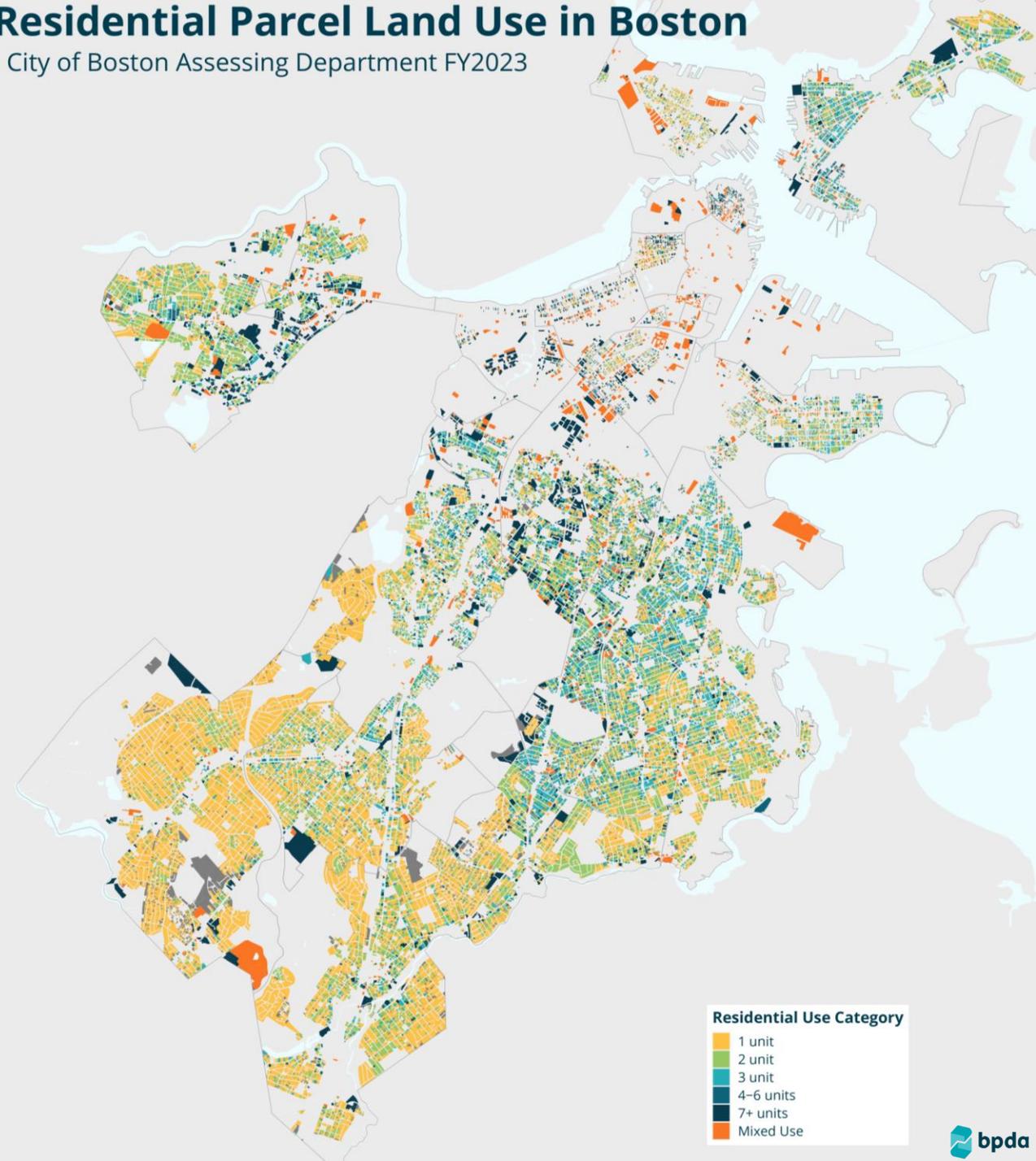
Citywide Residential + Mixed-Use Land Area by Category



Source: City of Boston Assessing Department FY2023, BPDA Research Division Analysis

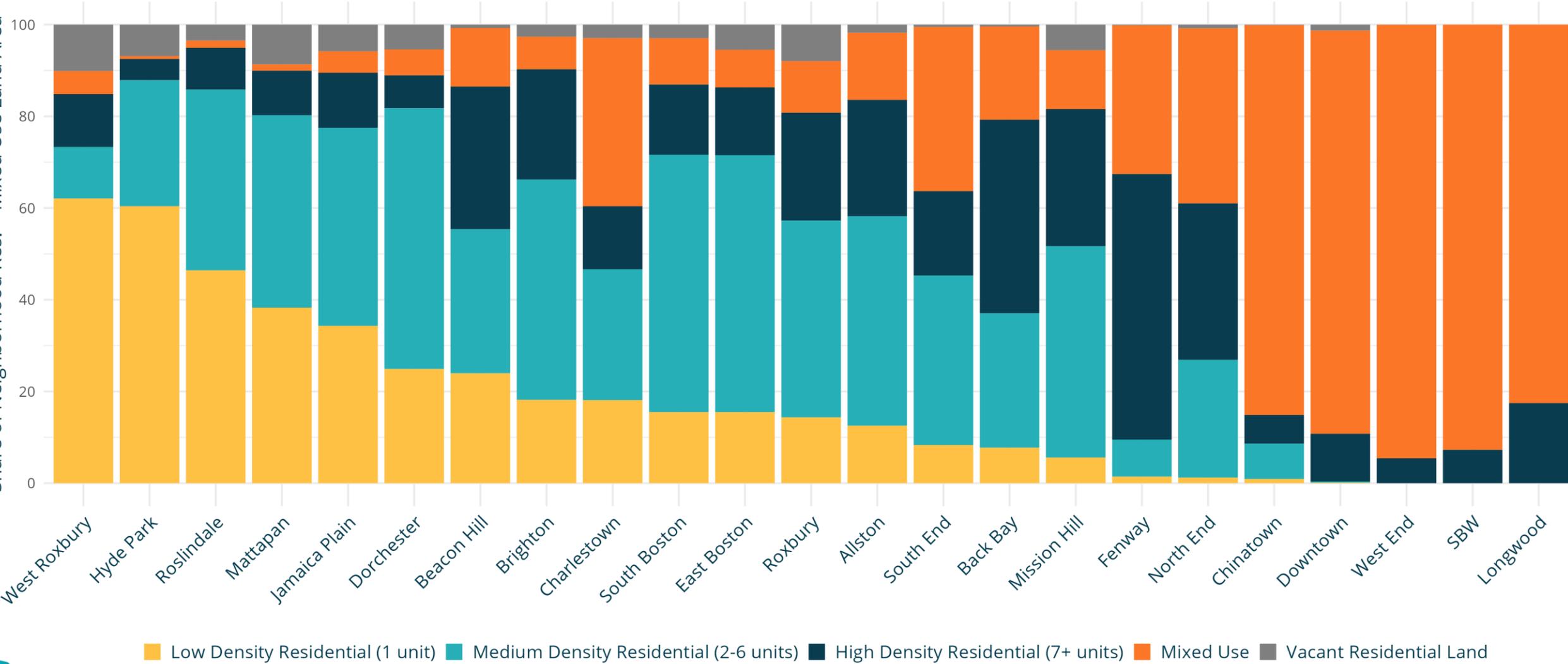
Residential Parcel Land Use in Boston

City of Boston Assessing Department FY2023



Neighborhoods furthest from downtown tend to have more low-density and vacant residential land than other neighborhoods. South Boston & East Boston have the largest shares of medium-density residential land.

Residential + Mixed-Use Land Area by Neighborhood



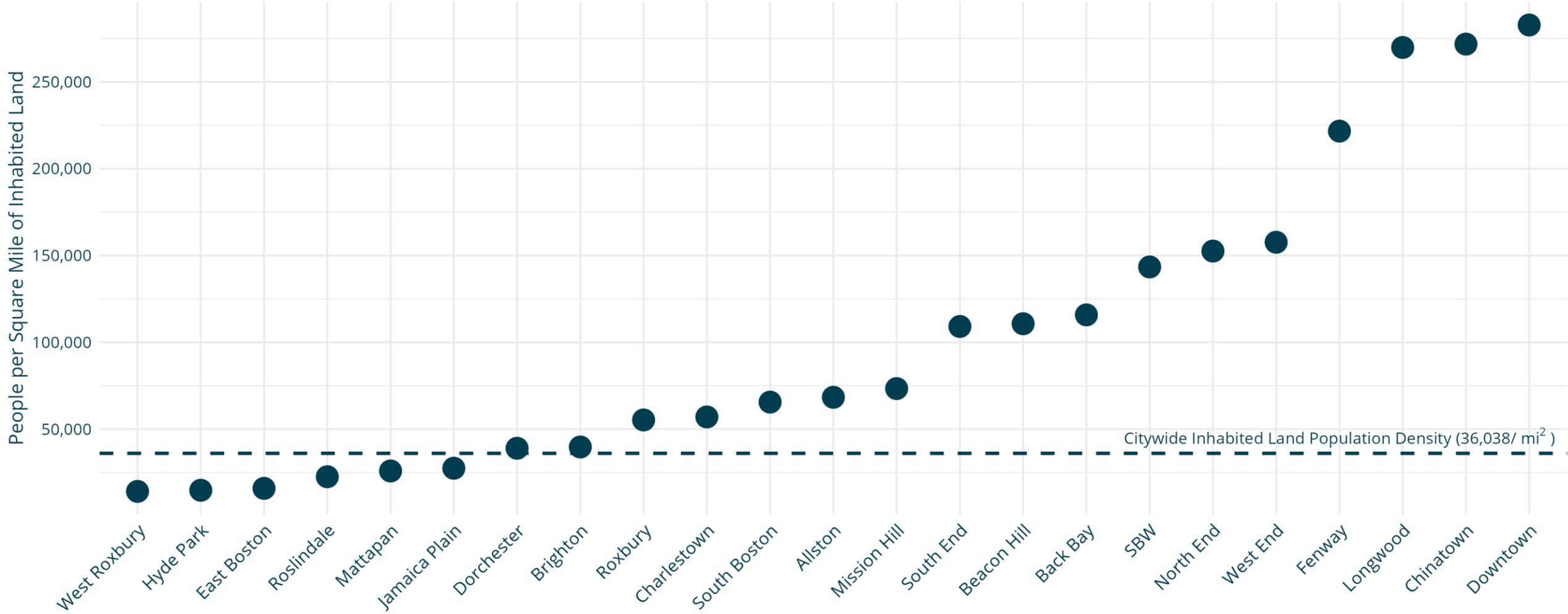
Low Density Residential (1 unit) Medium Density Residential (2-6 units) High Density Residential (7+ units) Mixed Use Vacant Residential Land



Source: City of Boston Assessing Department FY2023, BPDA Research Division Analysis

Longwood, Chinatown, & Downtown have the highest inhabited land population densities of all neighborhoods.

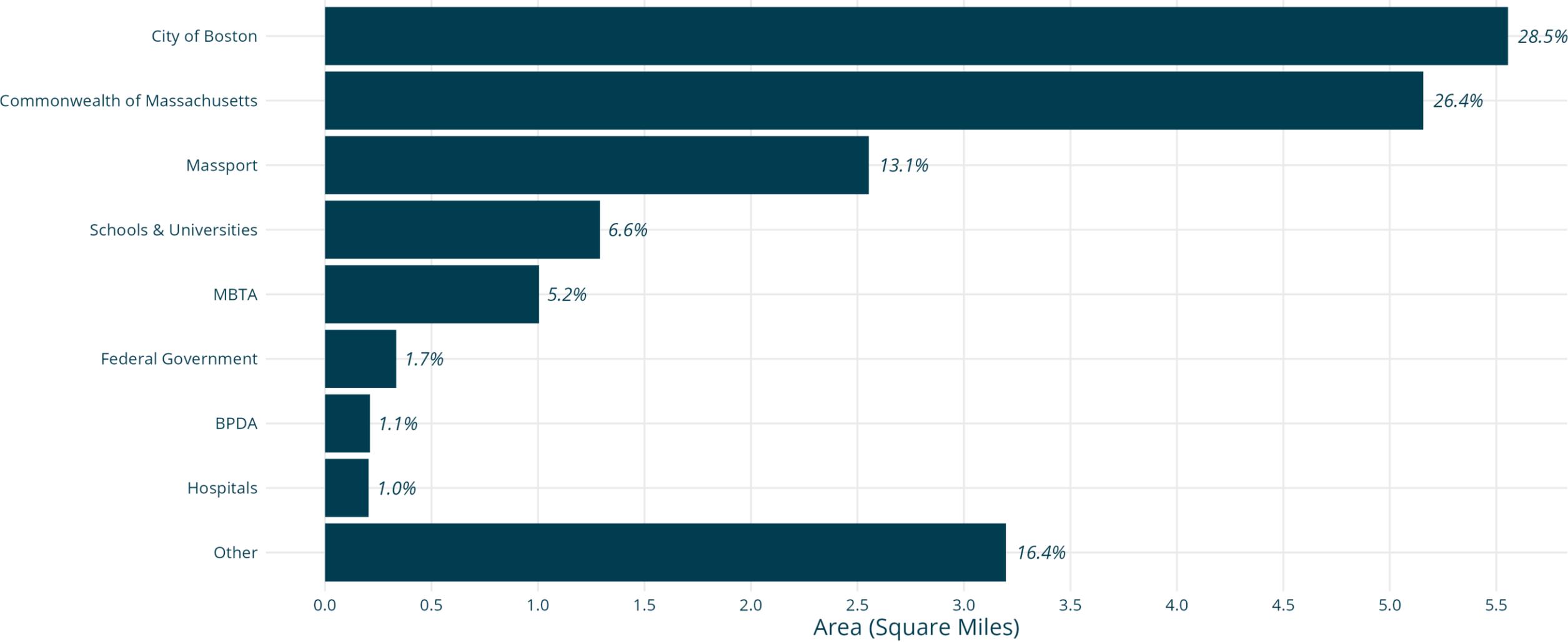
Inhabited Land Population Density by Neighborhood



Source: City of Boston Assessing Department FY2023 & U.S. Census 2020, BPDA Research Division Analysis
Note: Density is calculated using total population divided by the total land area of non-vacant residential and mixed-use parcels, in addition to other inhabited parcels such as dormitories, rooming houses, nursing homes, and subsidized housing.

The City and the Commonwealth each have care and custody of over a quarter of tax-exempt land in Boston. The BPDA has care and custody of only 1% of tax-exempt land.

Citywide Tax-Exempt Land by Care and Custody



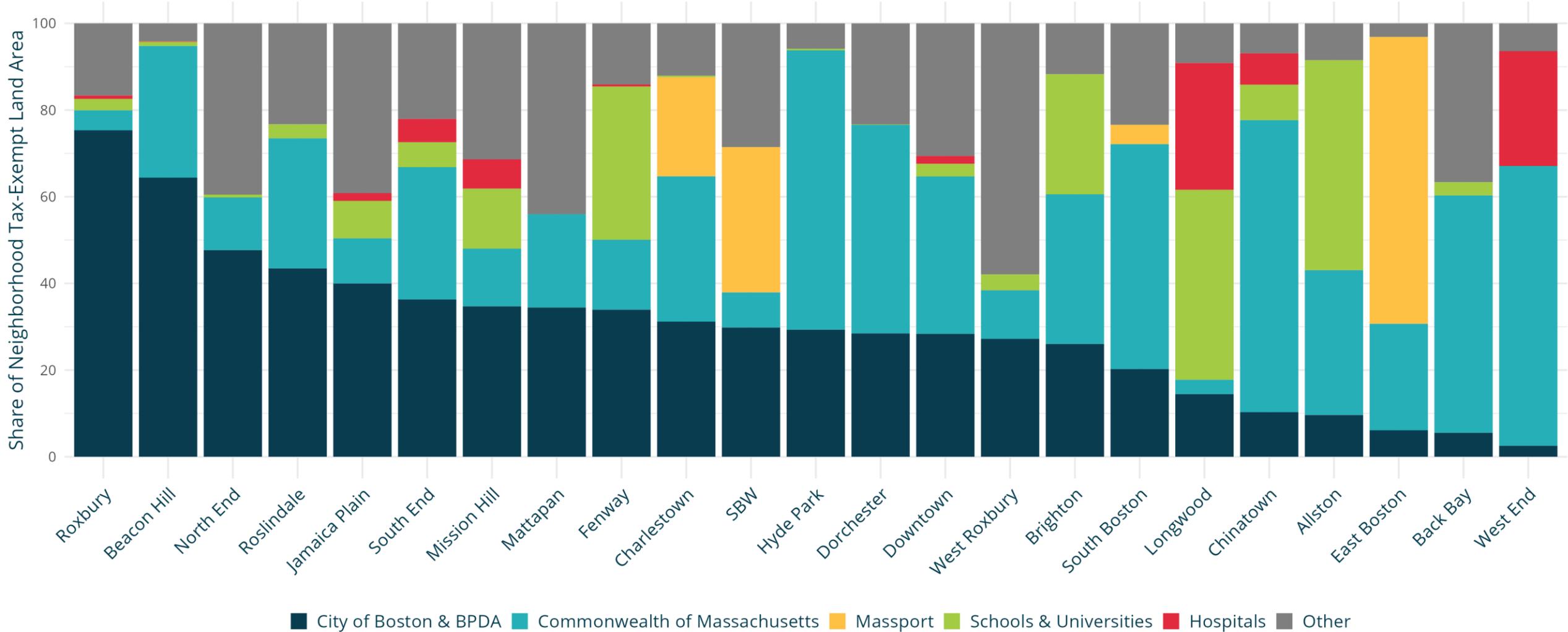
Source: City of Boston Assessing Department FY2023, BPDA Research Division Analysis

Note: Other includes all other care and custody types, such as museums, religious organizations, and nonprofits.



Nearly 80% of tax-exempt land in Roxbury is under the care and custody of the City. Pockets of other care and custody types are concentrated in certain neighborhoods.

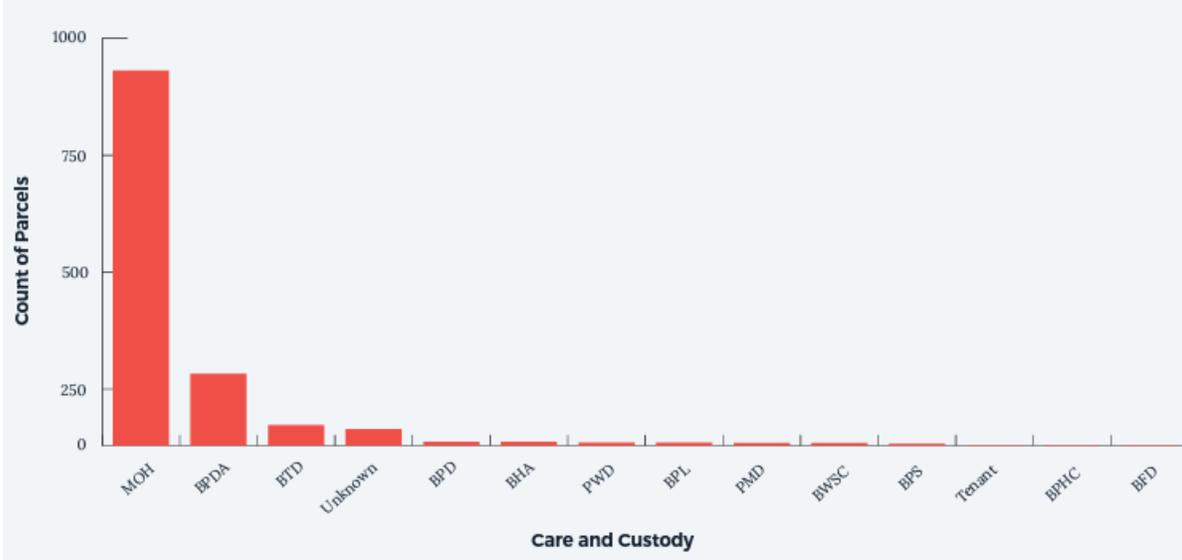
Tax-Exempt Land Care and Custody by Neighborhood



Source: City of Boston Assessing Department FY2023, BPDA Research Division Analysis
 Note: Other includes all other care and custody types, such as the federal government, museums, religious organizations, and nonprofits.

The City is actively working to capitalize on vacant or underutilized city-owned land for new development.

Vacant or Underutilized Parcels by Care and Custody

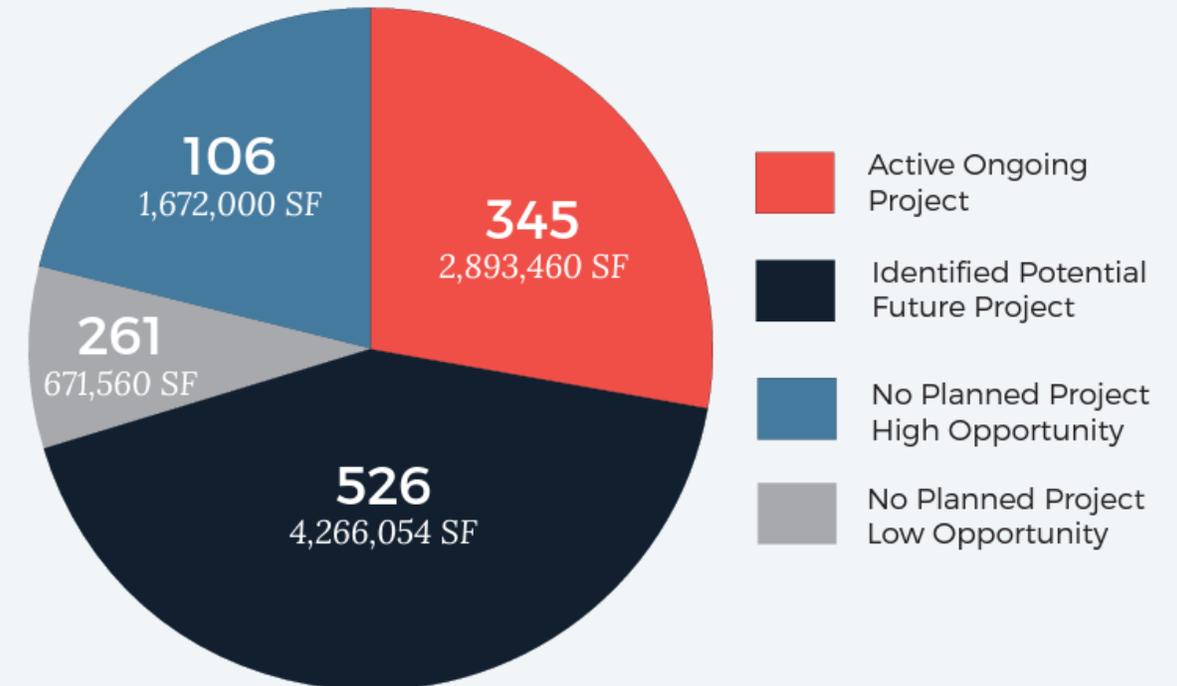


[Link to Citywide Land Audit](#)

Vacant or Underutilized Parcels by Project Status

2,976 city-owned parcels identified totalling 176.9M sf

1,238 vacant and underutilized, 9.5M sf (5.4%)



2.

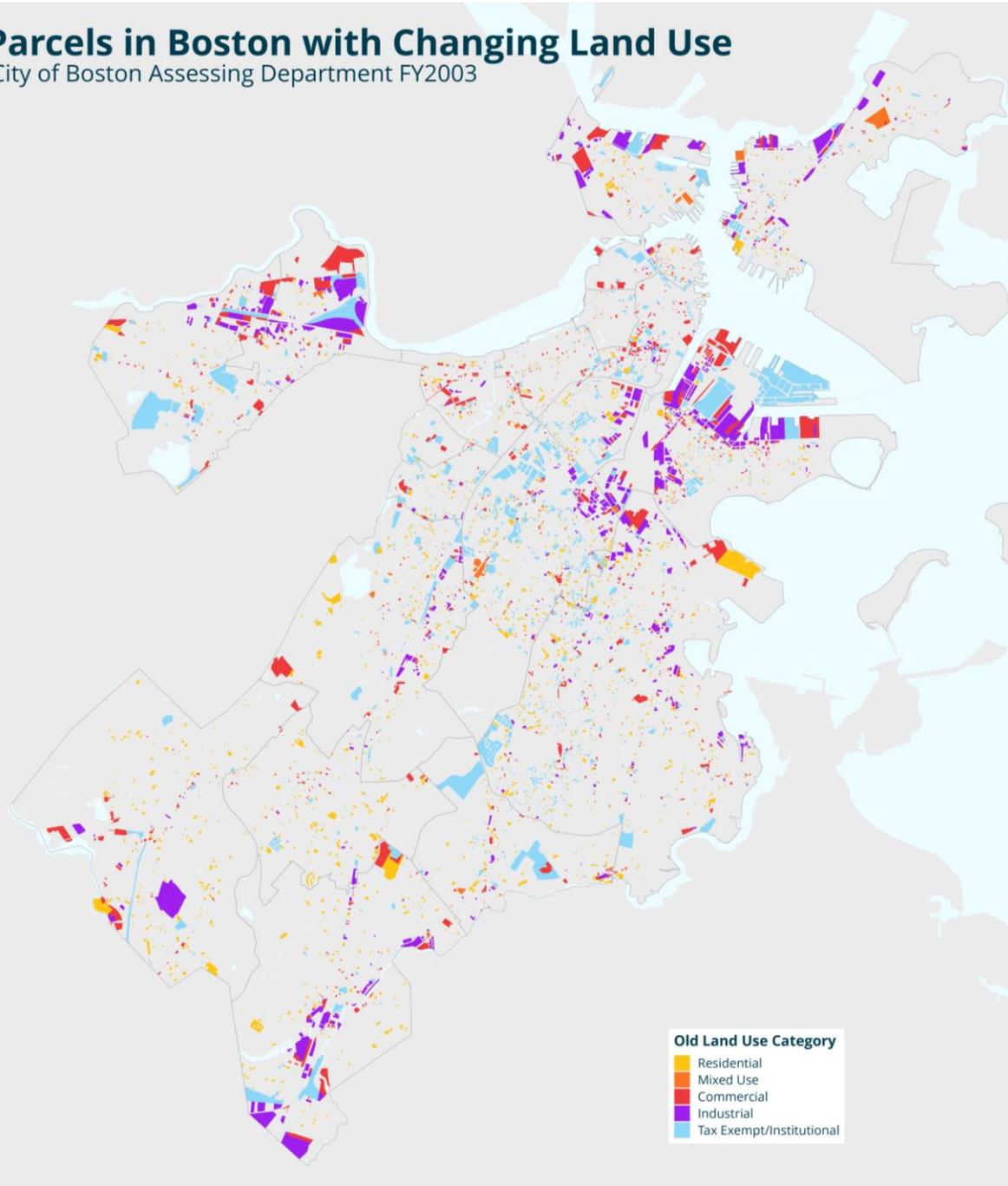
Land use trends over time



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Parcels in Boston with Changing Land Use

City of Boston Assessing Department FY2003

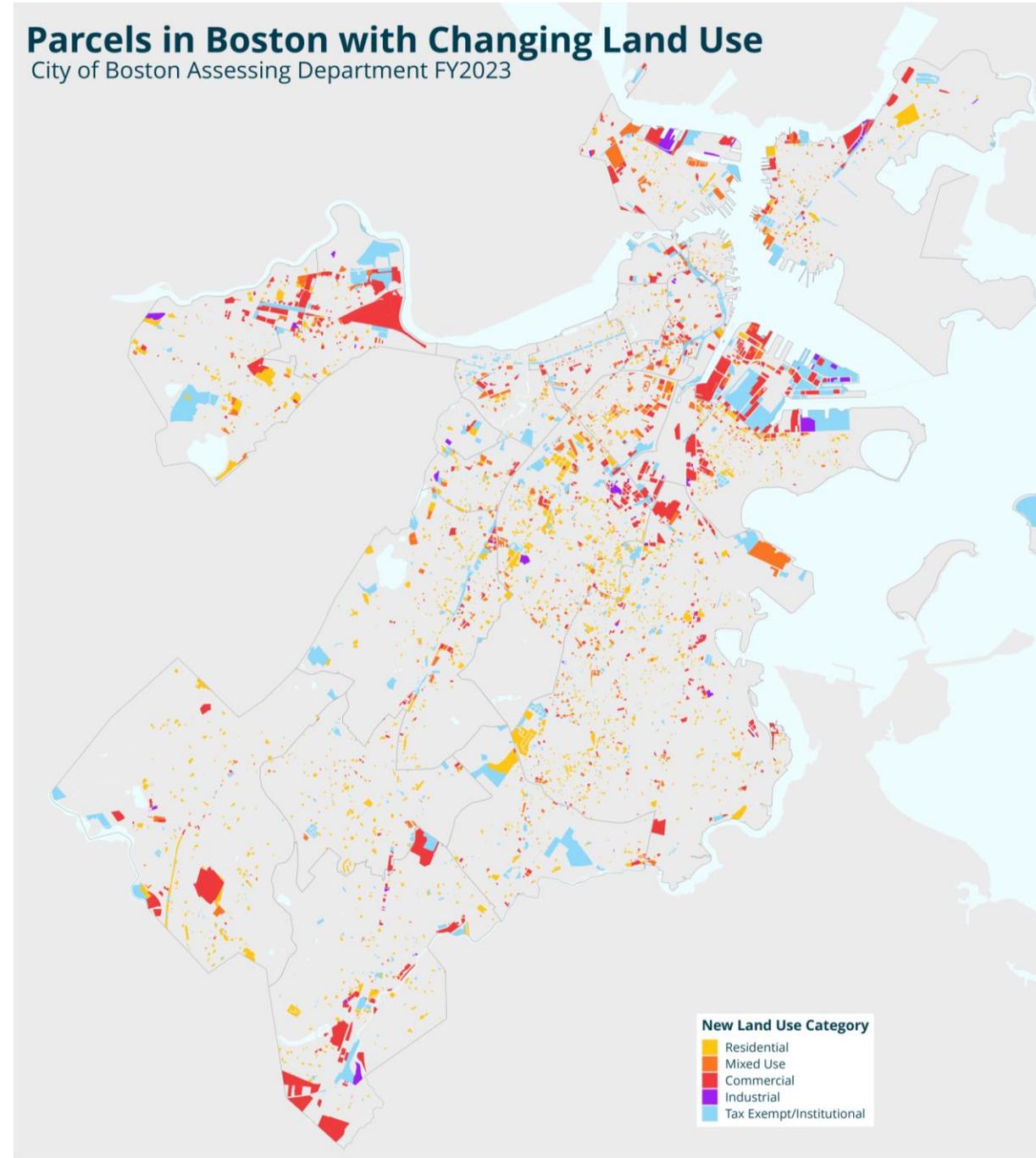


Old Land Use Category

- Residential
- Mixed Use
- Commercial
- Industrial
- Tax Exempt/Institutional

Parcels in Boston with Changing Land Use

City of Boston Assessing Department FY2023

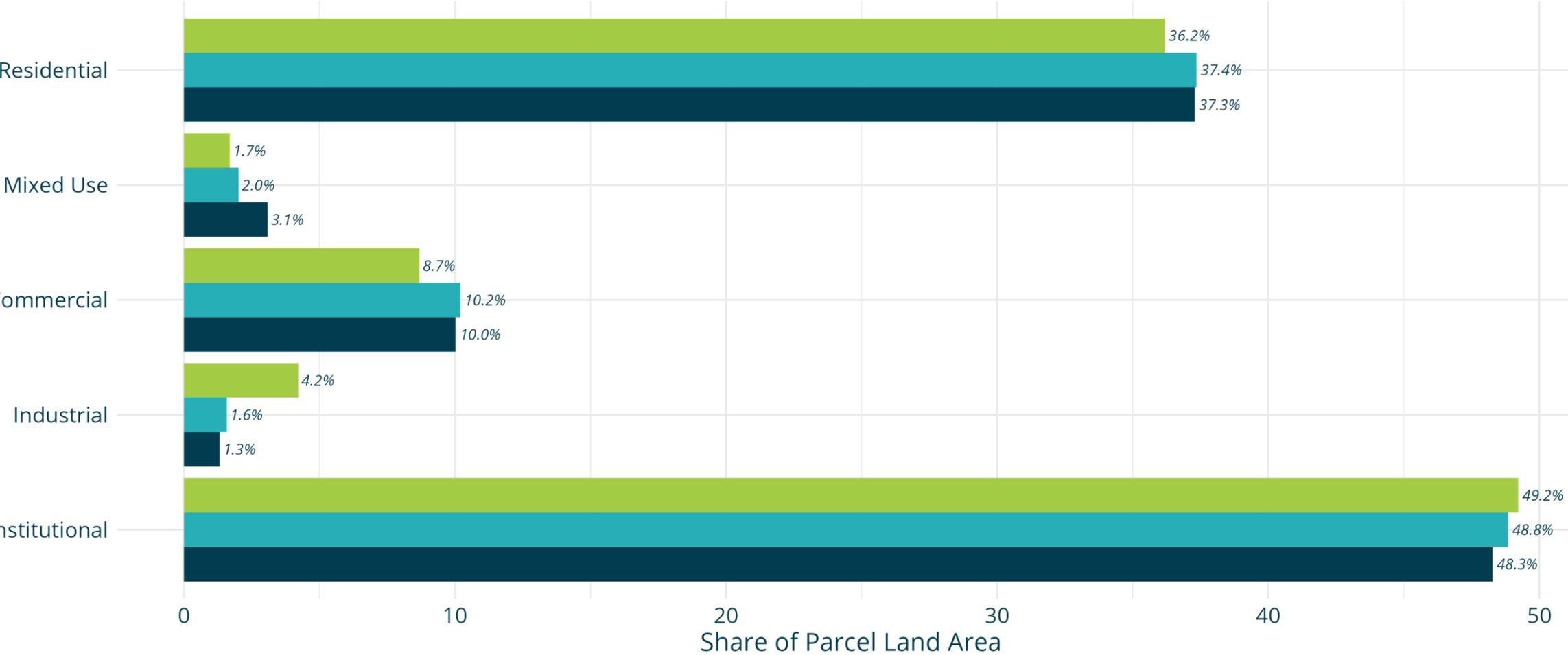


New Land Use Category

- Residential
- Mixed Use
- Commercial
- Industrial
- Tax Exempt/Institutional

Since FY2003, there has been a decrease in industrial and tax-exempt land, and an increase in mixed-use, residential, and commercial land.

Parcel Land Area Category Share Over Time



Fiscal Year 2003 2013 2023

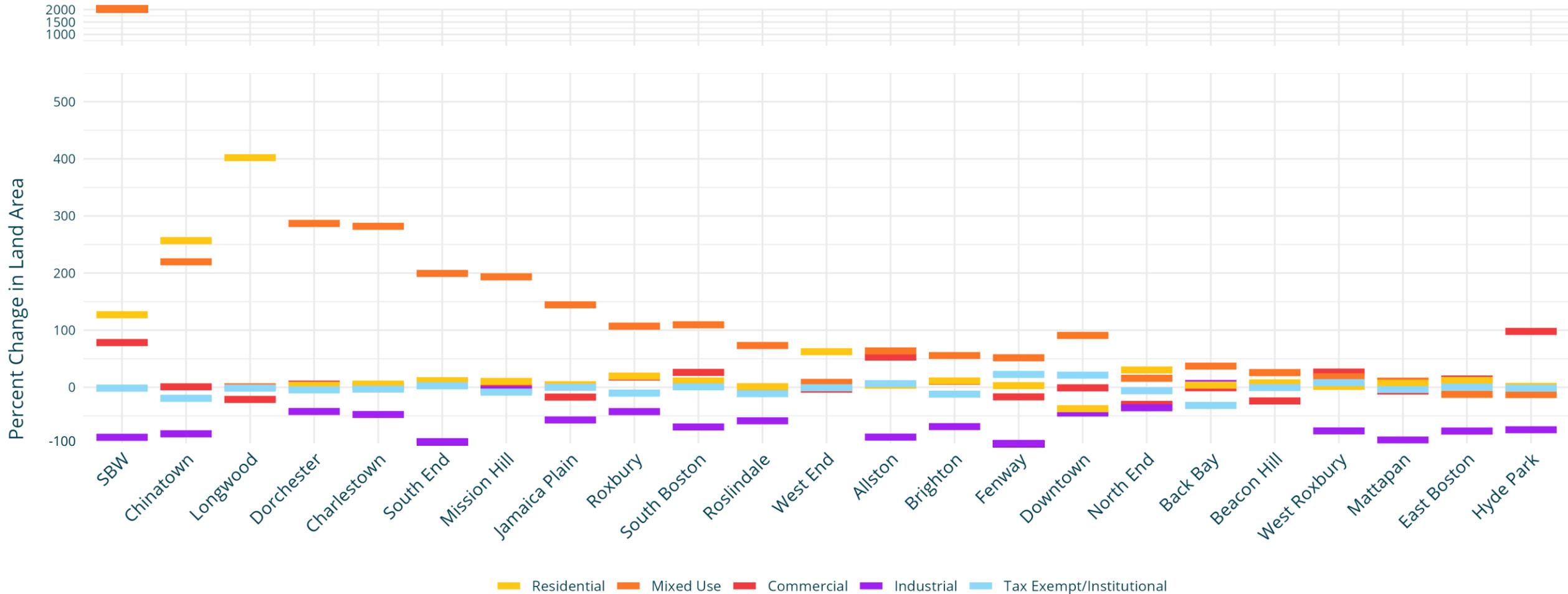
Source: City of Boston Assessing Department FY2003 & FY2013 & FY2023, BPDA Research Division Analysis



Since FY2003, the SBW has seen a substantial increase in mixed-use land, while Chinatown and Longwood have seen the largest relative shift towards new residential land.

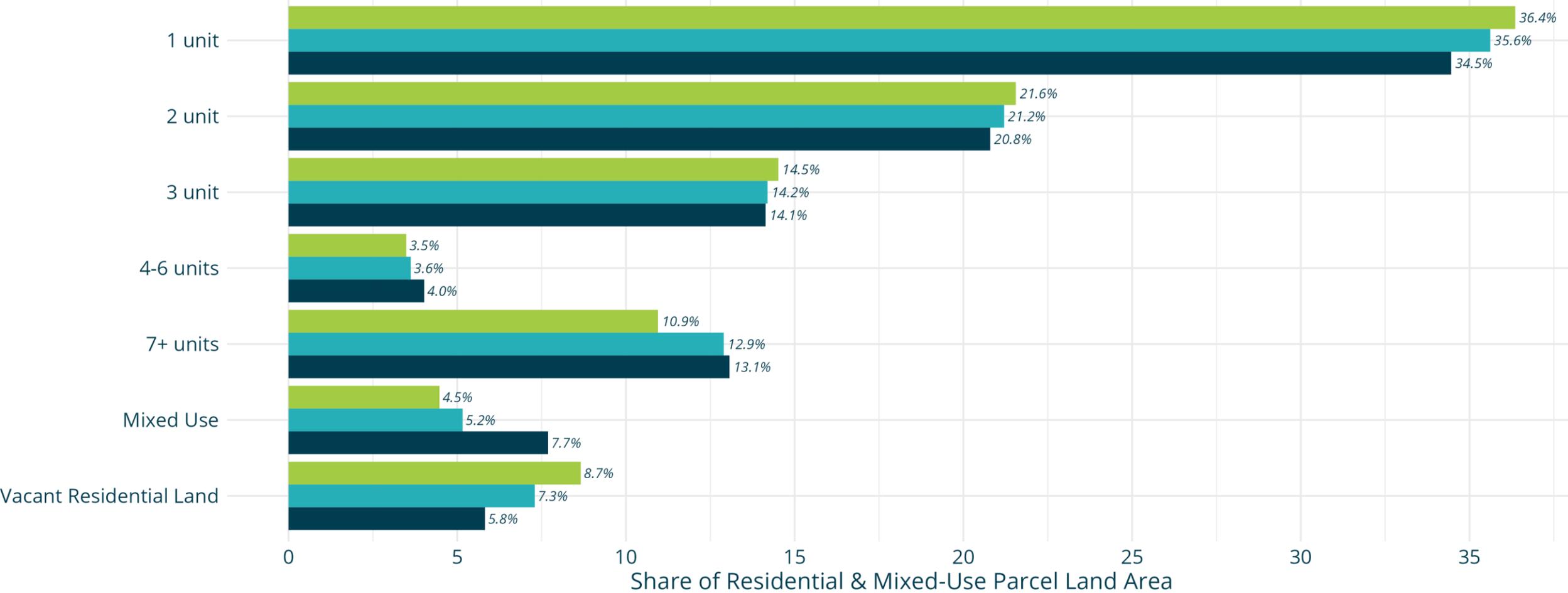
Parcel Land Area by Category and Neighborhood

Percent Change FY2003 to FY2023



The share of land used for single-family homes has decreased citywide. The share of land used for higher-density housing (7+ unit & mixed use) has increased.

Residential + Mixed-Use Land Area Share by Category Over Time



Fiscal Year 2003 2013 2023

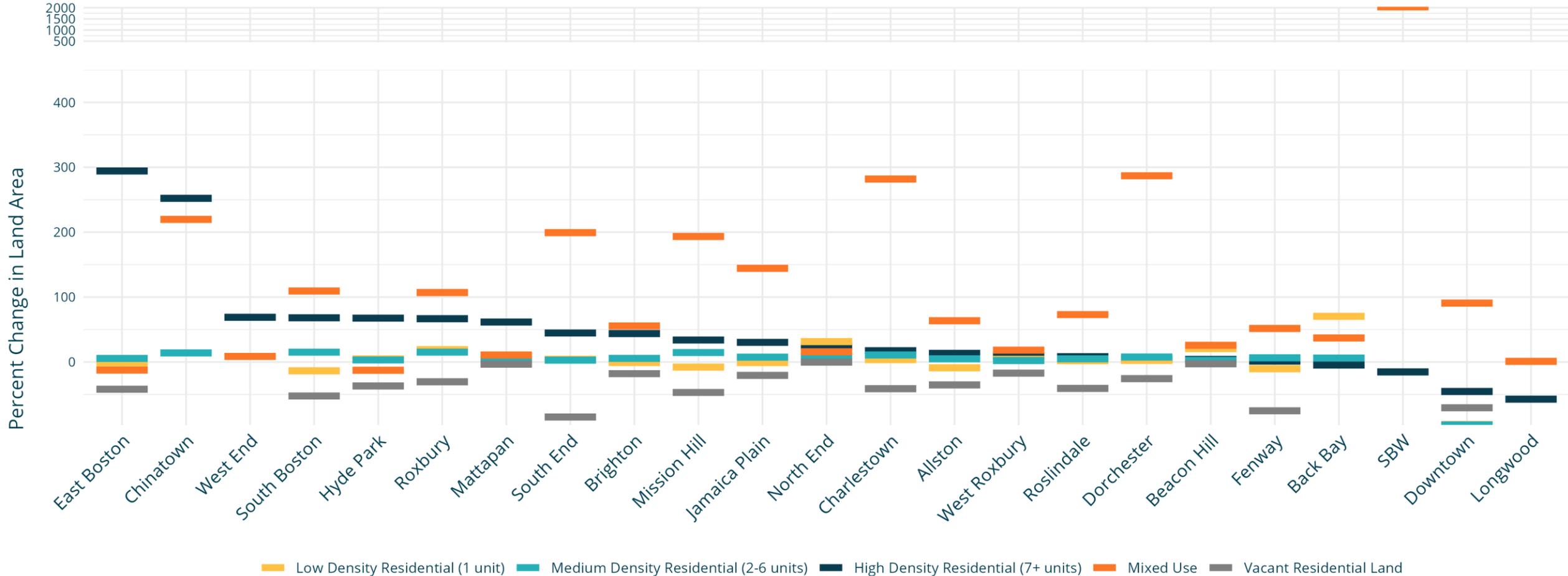
Source: City of Boston Assessing Department FY2003 & FY2013 & FY2023, BPDA Research Division Analysis



East Boston & Chinatown have both seen sharp increases in land used for high-density housing. Vacant residential land has declined in nearly all neighborhoods.

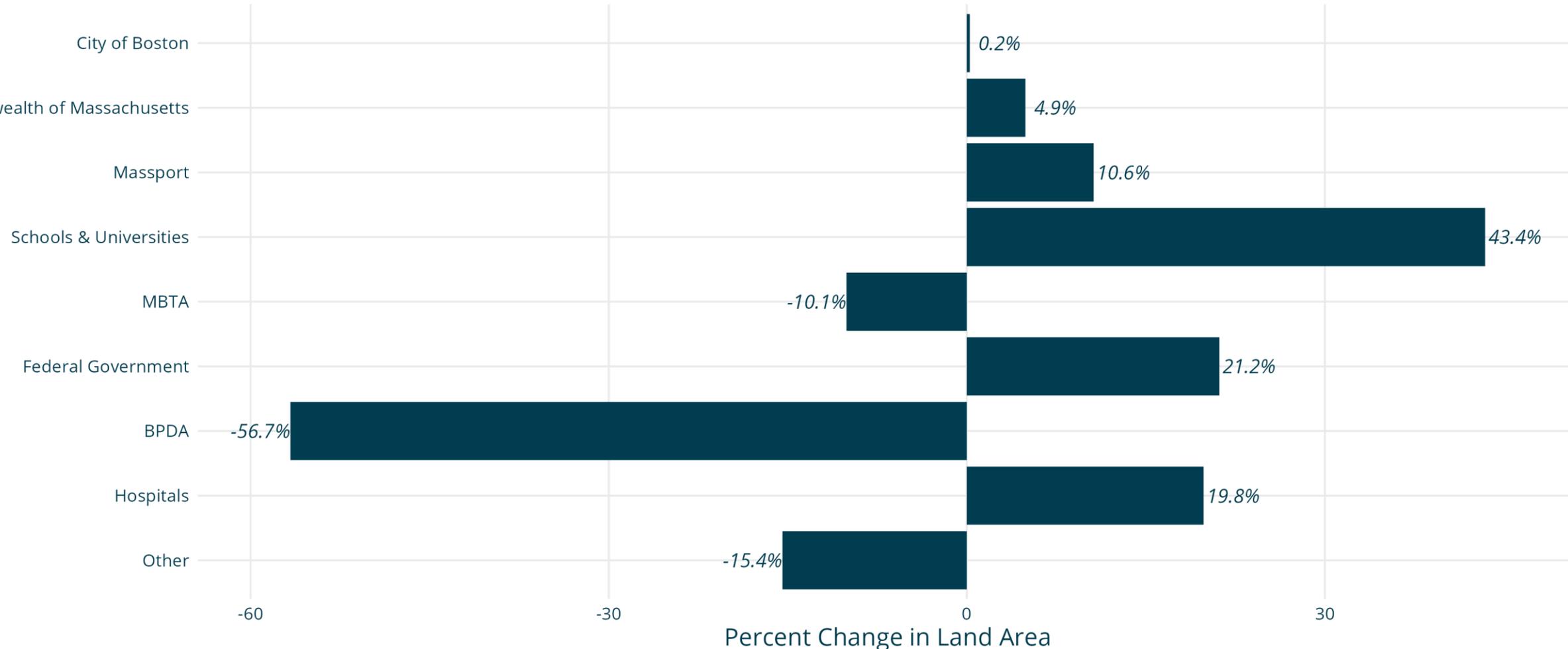
Parcel Land Area by Residential Category and Neighborhood

Percent Change FY2003 to FY2023



**Land under care and custody of the BPDA has dropped by more than half since FY2003.
Land under care and custody of schools and universities has increased by over 40%.**

Citywide Tax Exempt Land by Custody Category Percent Change FY2003 to FY2023

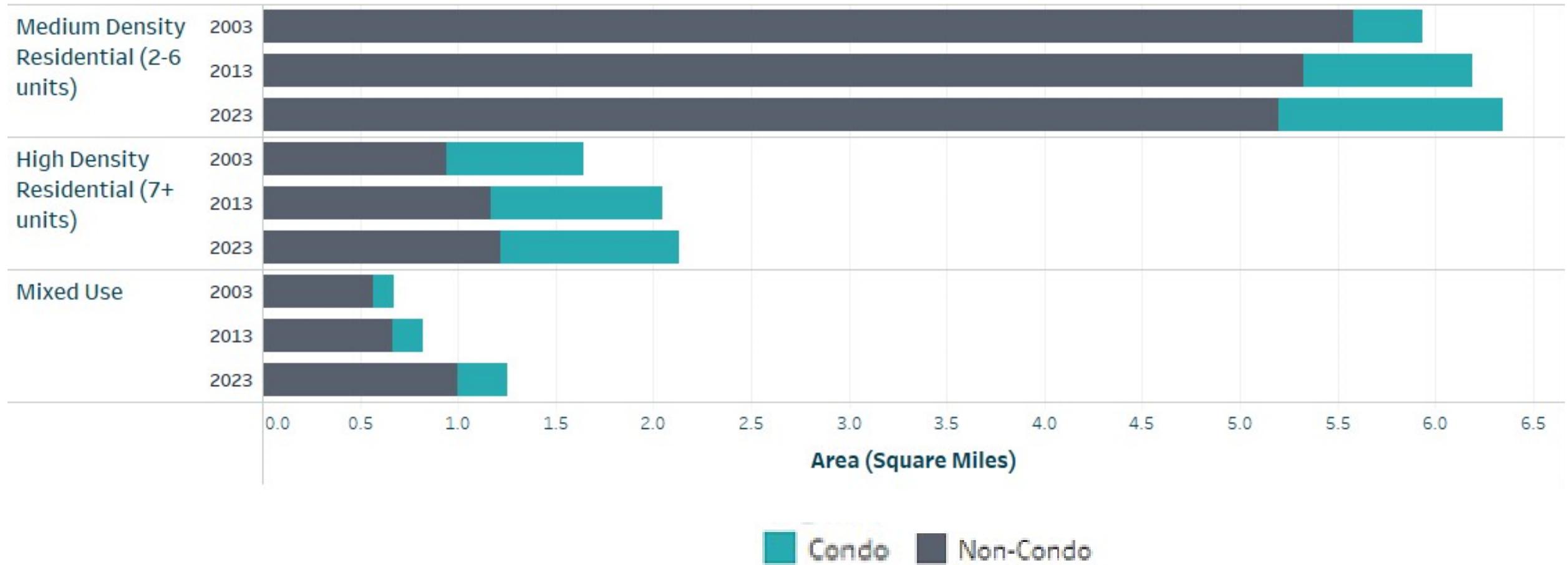


Percent Change in Land Area

Source: City of Boston Assessing Department FY2003 & FY2023, BPDA Research Division Analysis
Note: Other includes all other custody types, such as museums, religious organizations, and nonprofits.

In FY2003, just 6% of medium density residential parcels were condo parcels. Two decades later, 18% of medium density residential parcels were condos.

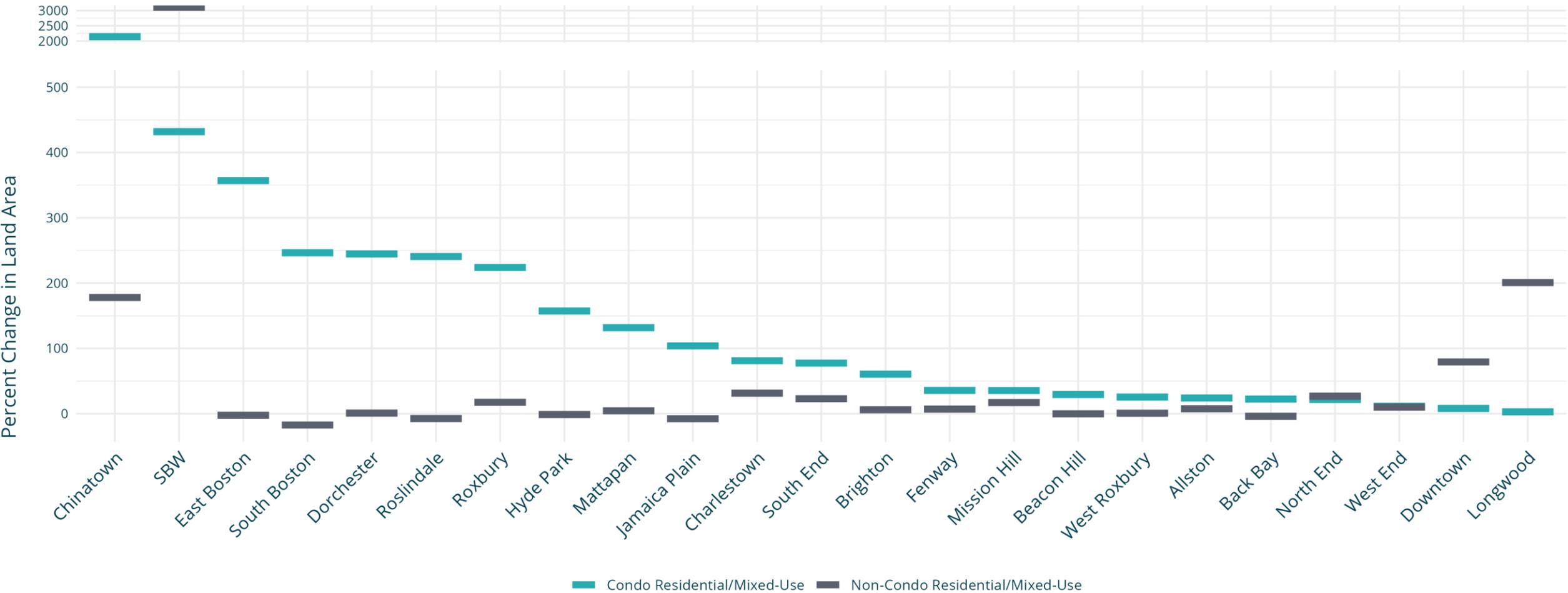
Condo vs Non-Condo Over Time



Chinatown has seen sharp growth in residential condo buildings. Neighborhoods with high shares of medium-density residential have also seen large growth in condo parcels.

Residential/Mixed-Use Land Area by Condo vs Non-Condo and Neighborhood

Percent Change FY2003 to FY2023



3.

Snapshot of current land value patterns



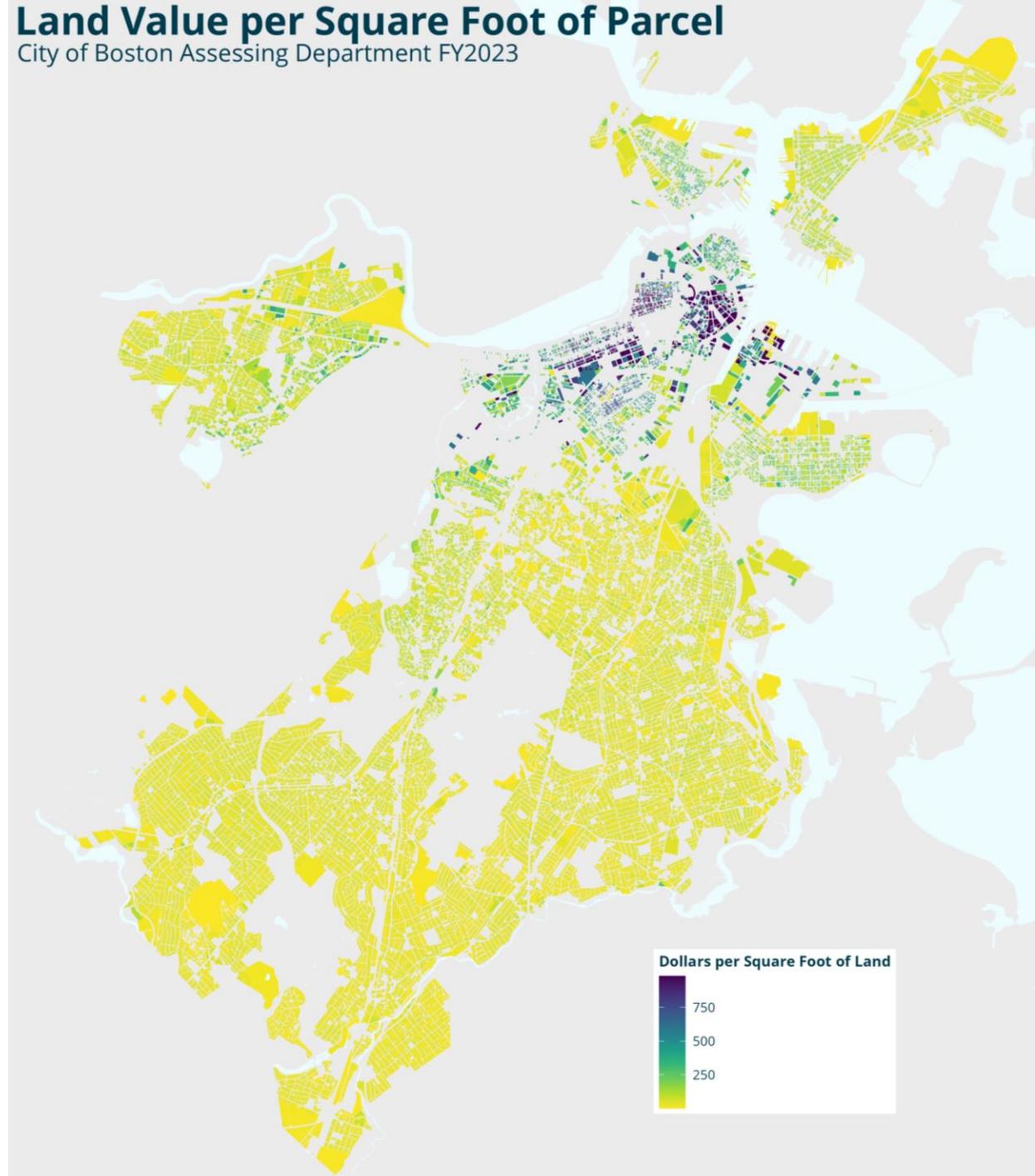
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Land in Boston with the highest assessed value is concentrated in neighborhoods close to downtown (Beacon Hill, Back Bay, South End, South Boston Waterfront).



Land Value per Square Foot of Parcel

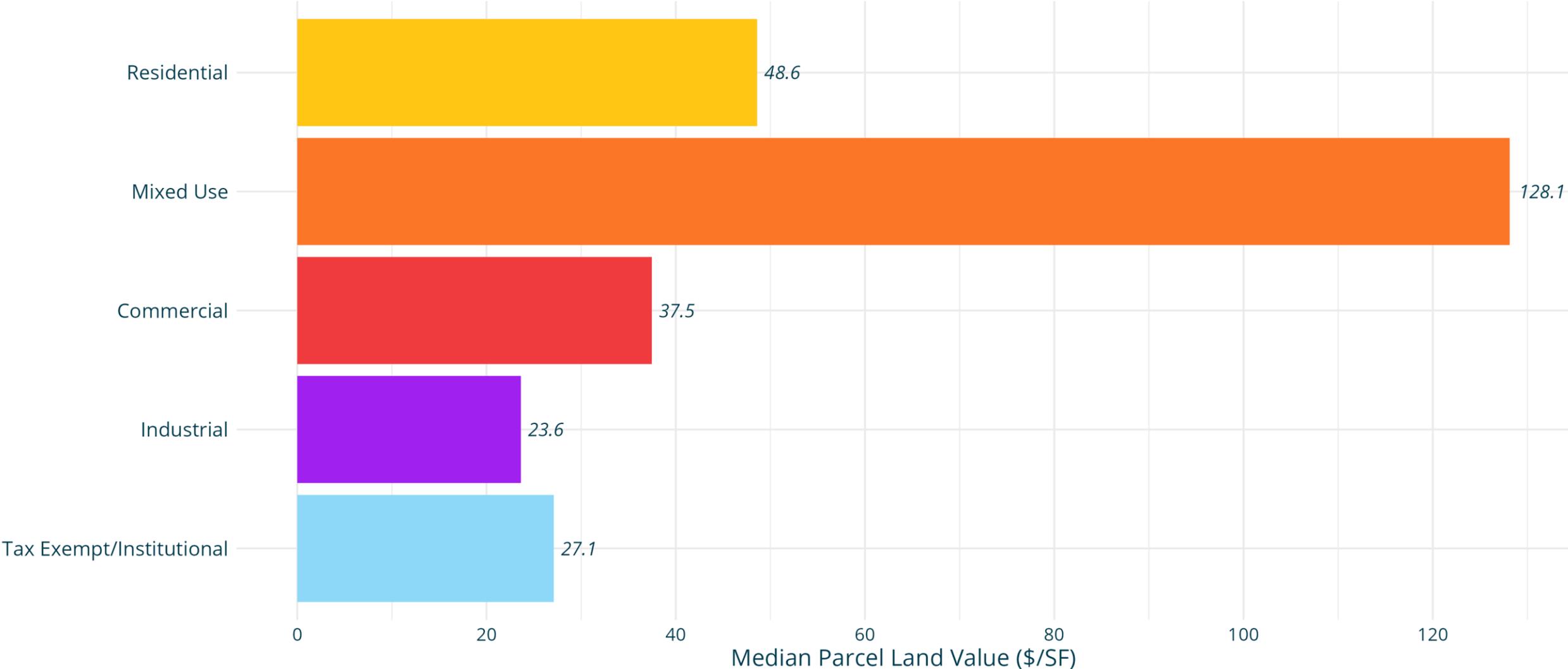
City of Boston Assessing Department FY2023



Note: Map excludes condo parcels and tax-exempt parcels. Parcels above the 99th percentile of land value per square foot (984 \$/SF) are shown at the 99th percentile.

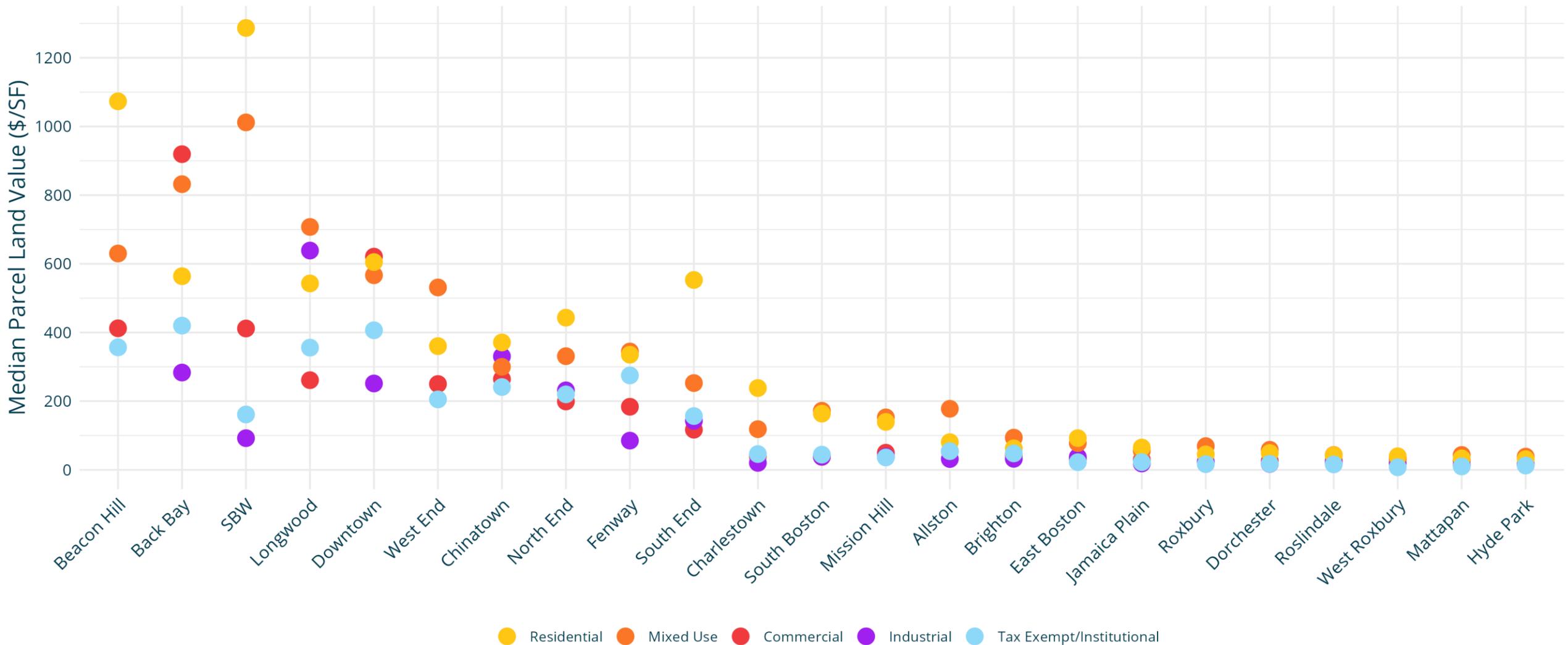
On average, mixed-use parcels have the highest assessed land values of any use category. Residential parcels, on average, have higher assessed land values than commercial parcels.

Median Parcel Land Value per SF of Land by Category



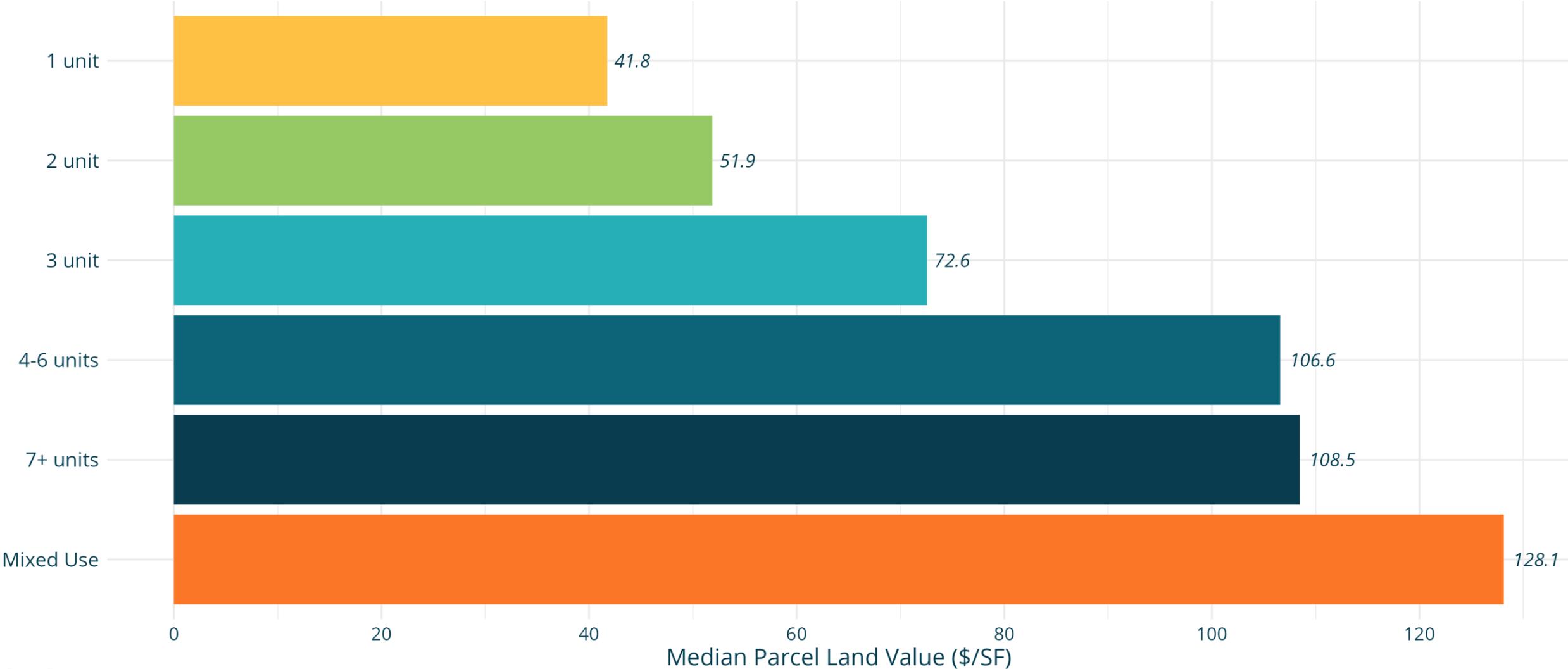
Parcels in Boston with the highest assessed land values are residential and mixed-use parcels located in Beacon Hill & the South Boston Waterfront, and commercial parcels in Back Bay.

Median Parcel Land Value per SF of Land by Category and Neighborhood



On average, land used for a higher residential intensity has a higher assessed value.

Median Residential Parcel Land Value per SF of Land by Category



In neighborhoods with the highest assessed residential land values, single-family parcels are the highest compared to other residential use types.

Median Residential Parcel Land Value per SF of Land by Category and Neighborhood



4.

Land value trends over time

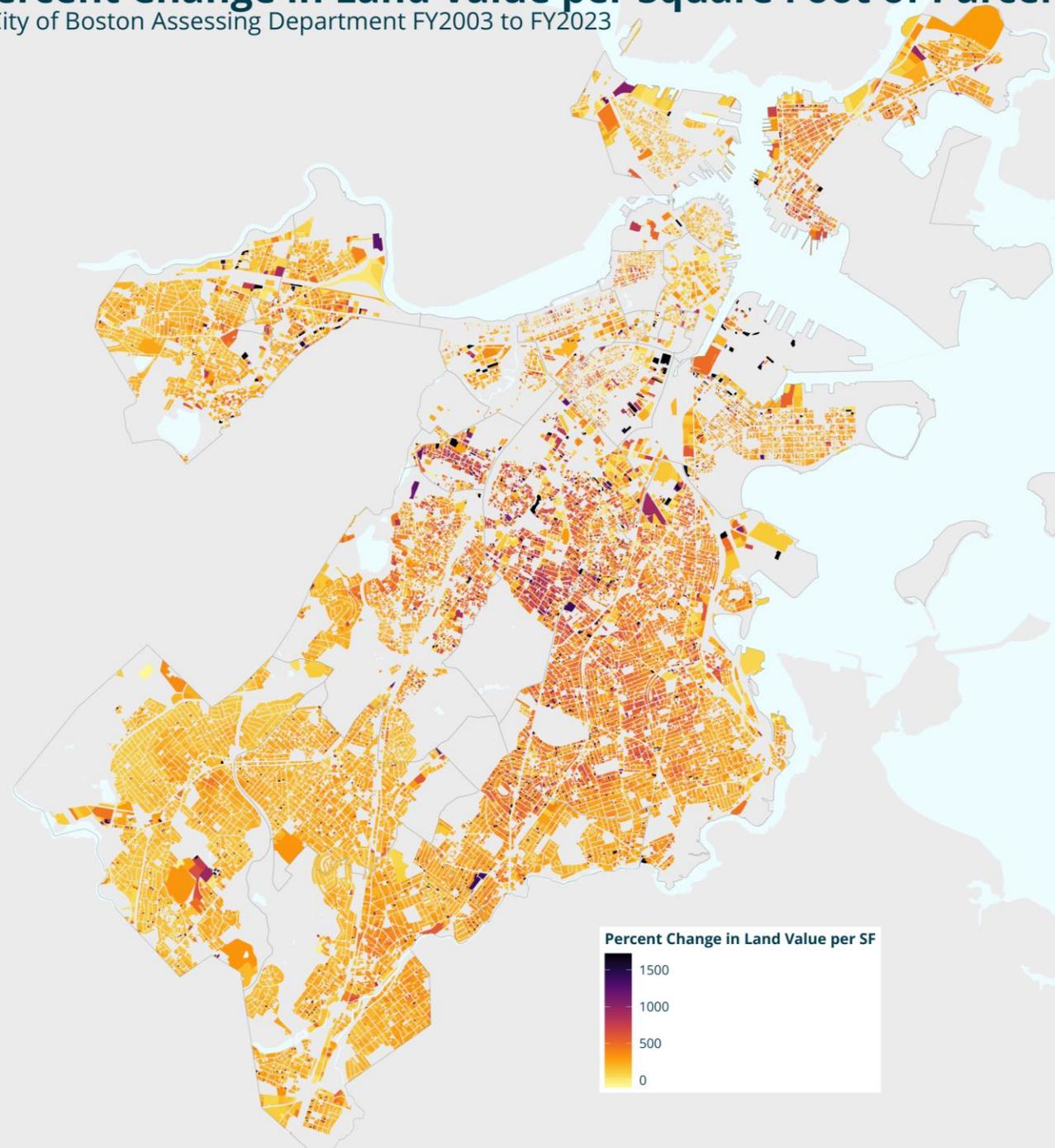
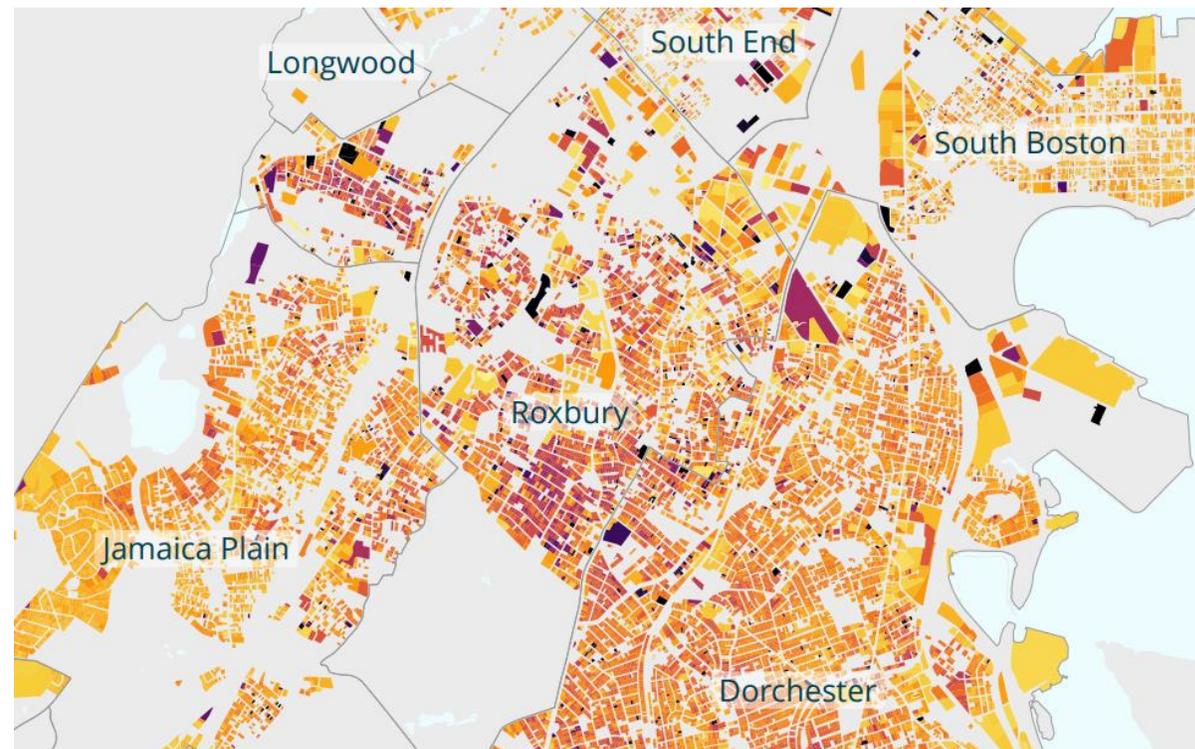


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Mission Hill & Roxbury have the largest relative increase in assessed land values at the neighborhood level.

Percent Change in Land Value per Square Foot of Parcel

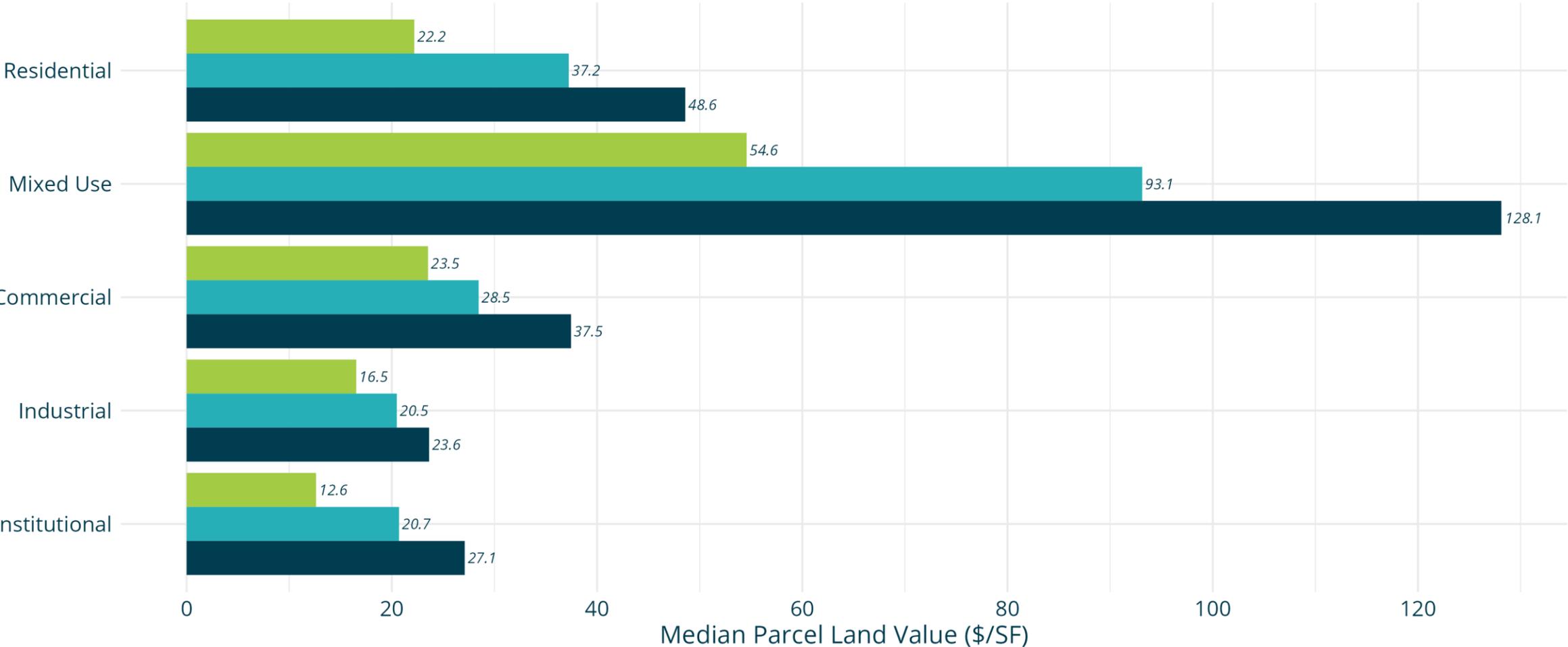
City of Boston Assessing Department FY2003 to FY2023



Note: Map excludes condo parcels, tax-exempt parcels, and parcels unavailable in both years. Parcels above the 99th percentile of percent change in land value per square foot are shown at the 99th percentile.

Assessed land values of mixed-use parcels have increased the most of any land use type. Since FY2003, the average value of residential land has grown quicker than average value of commercial land.

Median Parcel Land Value per SF by Category Over Time (in 2023 dollars)



Fiscal Year 2003 2013 2023

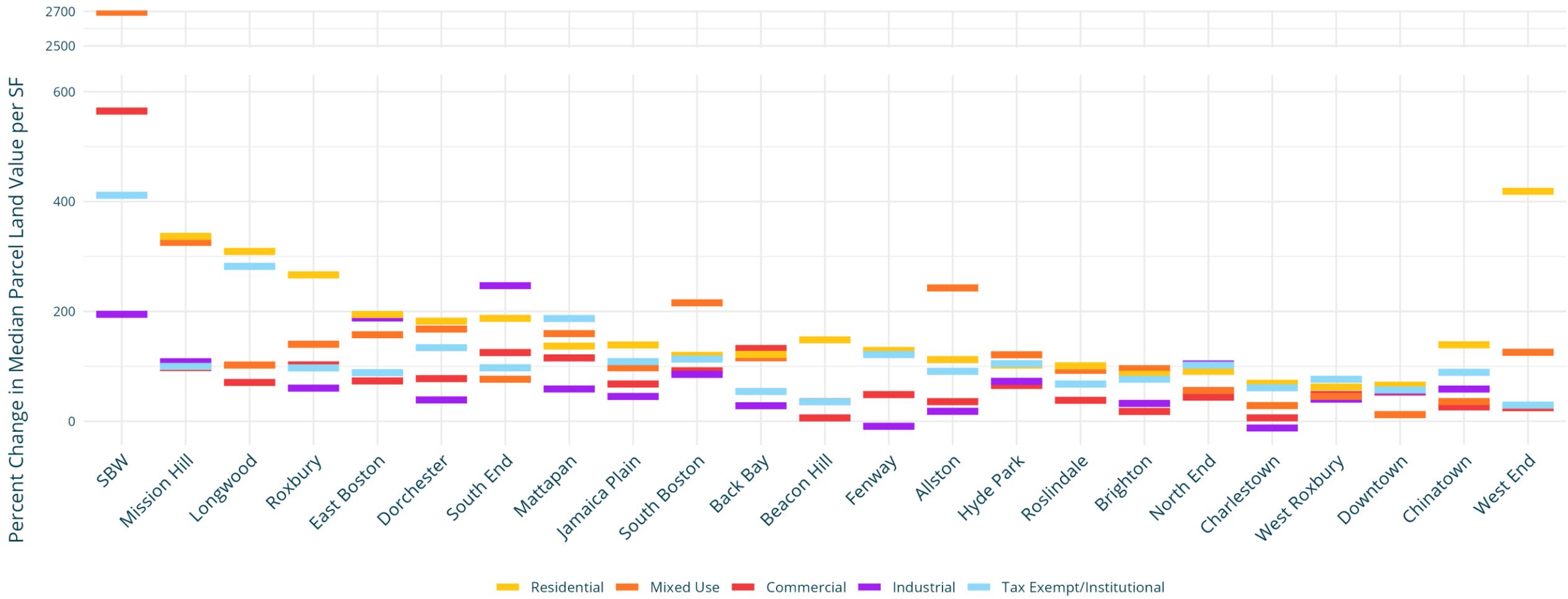
Source: City of Boston Assessing Department FY2003 & FY2013 & FY2023, BPDA Research Division Analysis



Mixed use and commercial assessed land values in the SBW have seen the highest relative increase citywide. The West End, Mission Hill, Longwood, & Roxbury had the largest relative increases in assessed land values of residential land.

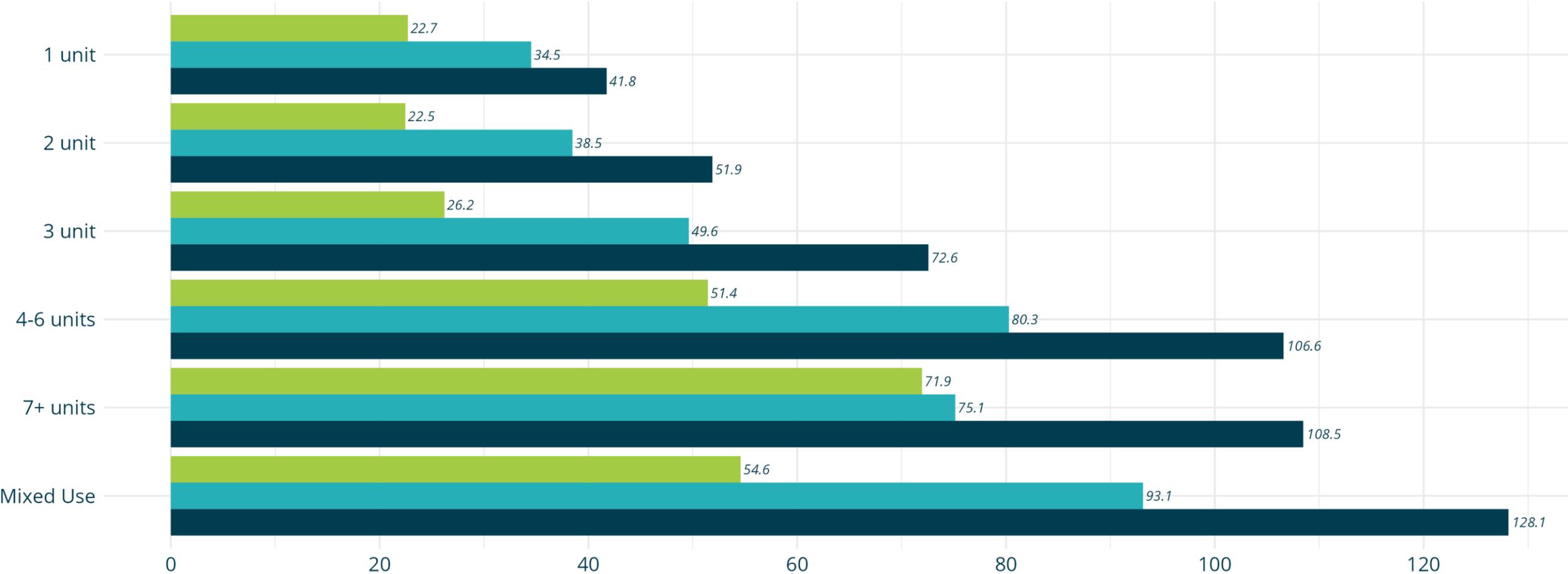
Median Parcel Land Value per SF by Category and Neighborhood

Inflation-Adjusted Percent Change FY2003 to FY2023



High-density housing (7+ unit parcels) had the highest median assessed parcel land values in FY2003. Mixed-use assessed land values have increased more rapidly than other residential types.

Median Residential Parcel Land Value per SF by Category Over Time (in 2023 dollars)



Fiscal Year 2003 2013 2023



Source: City of Boston Assessing Department FY2003 & FY2013 & FY2023, BPDA Research Division Analysis

The percent change in average land value by residential use type varies by neighborhood. South Boston has seen a sharp increase in the average land value of high-density residential parcels.

Median Residential Parcel Land Value per SF by Category and Neighborhood

Inflation-Adjusted Percent Change FY2003 to FY2023



Summary

1. Snapshot of current land use patterns

- Over a third of parcel land is residential, and nearly half is tax-exempt
- Neighborhoods furthest from downtown are mostly residential, while mixed-use and higher-density housing are prevalent closer to downtown

2. Land use trends over time

- Citywide shift from industrial and tax-exempt land to commercial, mixed-use, and residential land
- Shift in residential use from lower-density housing to mixed-use and higher-density housing

3. Snapshot of current land value patterns

- Proximity to downtown commands the highest assessed land values
- On average, mixed-use parcels have the highest land values, and higher residential intensity correlates with higher land values

4. Land value trends over time

- Mission Hill and Roxbury lead in relative increases in assessed land values, with notable growth in East Boston and Dorchester
- Mixed-use parcels citywide, especially in the South Boston Waterfront, have seen the highest relative increases