2020 State of Downtown
Survey Results and Data
Downtown Business Owner & Employee Survey

- DBA ran a survey of downtown businesses owners and employees for ten days at the end of August.
- Representatives from about 75 different businesses in downtown responded.
- Our goal was to gather data around the following questions:
  - How are you doing?
  - How's your emotional, physical, and financial health?
  - What are the ways in which you have been impacted in the last few months?
  - How's your business doing?
Question 1: How would you rate the following for you personally?

- 72% of respondents selected excellent or good across all three health metrics.
- 31% indicated that their emotional/social health is fair.
- 10% marked that they are in poor financial health.
Question 2: Which of the following applies to you?

- I own a business downtown
- I work at or manage a business downtown
- I have been laid off or furloughed from a downtown business
- I work downtown, but hours have been reduced
- Other

Almost 70% of respondents own a business downtown.
Question 3: If you are working, where are you working from?

• Almost 70% of respondents indicated that they are downtown at their place of employment 50% or more of the time.

• Half of respondents marked that they are working downtown 76% to 100% of the time while 36% noted that they are working from home at this same percentage.

• Based on 2017 survey numbers, downtown has 37,680 jobs.

Source: LEHD On the Map – Primary Jobs (2017)

This indicates that up to 18,840 employees are downtown daily;

...while approximately 13,565 are working from home.

Leaving 5,275 or 14% working between downtown and home.
Downtown Boise makes up only 2% of the city’s land area but delivers outsized benefits holding 24% of Boise’s jobs.

Source: LEHD On the Map – Primary Jobs (2017)

We can assume that throughout the city (outside of downtown) approximately 43,000 employees are working from home.
Question 4:
Please indicate what type of business you own/work at.

[Diagram showing different categories of businesses: Restaurant, Hotel/Motel, Bar/Nightlife, Technology, Retail, Fitness/Exercise, Professional Service, Nonprofit, Arts/Cultural, Personal Service, Other, Health Care, and Retail.]
Downtown Industries are Employers

Leisure & hospitality industry: 7.9% of all employment in Idaho

Retail: 12.1% of all employment in Idaho

Professional & business services: 12.5% of all employment in Idaho

Although the leisure and hospitality industry accounts for 10.6% of all employment in Idaho, this industry has suffered 35% of all jobs lost in the State since the beginning of March.
Question 5: Compared to this time last year how is your business doing in terms of revenue?

Almost 40% reported being down 50% or more.
While 15% of businesses indicated that they are doing the same or better than this time last year, almost 20% are down 70% or more.

Source: LEHD On the Map – Primary Jobs (2017)

One business indicated that they are down $34 million; another noted that they’ve been closed since March.
National Trends: Economic Hits Across Most Industries

Spending has dropped in 2020

- Clothing and clothing accessories are down 36.5%
- Services are down 13.3%
- Sporting goods, hobby, and bookstores are down 2.2%

Source: Census.gov, July 2020
After a rough first quarter of 2020, some industries are seeing modest increases in consumer spending in the second quarter.

- **Games, toys, and hobbies** are up 11% from Q1
- **Personal care** is up 2% from Q1
- **Recreational goods including books** are up 8% from Q1

US consumer spending rose a moderate 1.9% in July.
Question 6: If you are selling products or taking orders online, what percentage of your business is done online?

- 6% indicated that 81% to 100% of their business is done online.
- 51% are not conducting business online.
- 42% of respondents' business is 10-40% online.
E-Commerce Upticks

- In the second quarter of 2020, U.S. retail e-commerce sales increased 31.8% from the first quarter.
- E-commerce sales in the second quarter of 2020 accounted for 16.1% of total sales.
- Total retail sales for the second quarter of 2020 decreased 3.9% from the first quarter of 2020.

Source: Census.gov, July 2020
**Question 7:** How concerned are you about...

- **Becoming, or continuing to be unemployed:**
  Most answered between moderately (34%), slightly (22%), and not at all concerned (33%).

- **An economic recession:**
  90% responded that they were very or moderately concerned.

- **Going out of business:**
  Very and moderately concerned 37%; slightly concerned 35%; not at all concerned 28%

- **Lack of government assistance:**
  53% responded that they were very or moderately concerned. 34% indicated that they were slightly concerned.

- **Lack of affordable & safe childcare:**
  Respondents were fairly split here with 55% indicating some level of concern and 45% indicated none.
Question 8: What safety and/or other measures are you taking at your place of business?

Almost 100% responded with employees wearing face coverings and enhanced cleaning/disinfecting.

85%+ indicated that they are asking customers/clients to wear face coverings and limiting the number of people in an area.

30% to 40% are taking additional measures like temperature checks and contact tracing/reporting.
- Travel quarantine, paid sick leave, paid employee virus testing
- Contactless dining
- Employees wearing gloves
- COVID prescreen for every employee before every shift
- Plan submitted to CDH that has been approved

Downtown is SAFE.
**Question 9:**
As normal activity resumes, how concerned are you about...

- Overall health of you and your employees
- Likelihood that you or someone you work with will get COVID-19
- Customers or clients becoming upset about safety measures you are taking at your business
- Not being able to acquire PPE for yourself or employees
- People not keeping physical distance in public places
- Public spending habits in relation to your business
- Being able to retain customers and clients

![Graph showing concerns and levels of concern](image-url)
Question 10: Tell us anything else that you wish to share about your experiences during the last five months.

• The first round of PPP was a great help to small businesses, but we really need another round of it for most of us to be able to survive and provide jobs for those currently out of work and looking to return.

• This is a very scary time for everyone but especially small business owners. We are being very vigilant regarding the virus. Not knowing how much longer this situation will continue is very scary.

• As a small business I have adjusted shifts to limit exposure from each other all the while adjusting days off for mental days. Also worrying about safety exposure to the crew on their free time. I have had 2 employees out for a combined total of 35 days for COVID protocol, none of which tested positive!
I've never worn so many hats and juggled so many balls in my entire life!!! It's okay, as I'm a bit of an adrenaline junkie.

We'll get through this.

#ThisIsYOURdowntown
Thank you.

Jennifer Hensley
Executive Director
Downtown Boise Association
jhensley@downtownboise.org
State of Downtown Boise Annual Meeting

Matt Borud
Idaho Tourism Update
September 10, 2020
$3.7 billion spent in Idaho in direct travel spending

- $1.02B food service & stores
- $547M local transportation
- $607M accommodations
- $487M entertainment
- $444M retail sales

Traveler Spending
Amount spent in Southwest Idaho:

$1.6 billion

### Lodging Collections

<table>
<thead>
<tr>
<th>Year</th>
<th>Collections</th>
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</thead>
<tbody>
<tr>
<td>FY16</td>
<td>$9,947,487</td>
</tr>
<tr>
<td>FY17</td>
<td>$11,006,382</td>
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<tr>
<td>FY18</td>
<td>$12,473,710</td>
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<td>$13,653,240</td>
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<tr>
<td>FY20</td>
<td>$13,119,104</td>
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Source: Idaho Tax Commission
Regional Lodging Collections

<table>
<thead>
<tr>
<th>Region</th>
<th>FY20 vs. FY19 % Change</th>
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<tbody>
<tr>
<td>Region 1</td>
<td>-1.2%</td>
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<tr>
<td>Region 2</td>
<td>-13.2%</td>
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<tr>
<td>Region 3</td>
<td>-7.3%</td>
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<tr>
<td>Region 4</td>
<td>-10.6%</td>
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<tr>
<td>Region 5</td>
<td>-8.9%</td>
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<tr>
<td>Region 6</td>
<td>-2.8%</td>
</tr>
<tr>
<td>Region 7</td>
<td>3.8%</td>
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Source: Idaho Tax Commission
Impact Projections

Projected COVID-19 impact on tourism industry revenue

Source: Oxford Economics

Source: U.S. Travel Association and Oxford Economics
Boise STR Occupancy Rate %

YTD: -31.7%

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
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<tbody>
<tr>
<td>2019</td>
<td>53.6%</td>
<td>60.9%</td>
<td>71.5%</td>
<td>71.9%</td>
<td>75.2%</td>
<td>82.8%</td>
<td>82.5%</td>
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<tr>
<td>2020</td>
<td>56.1%</td>
<td>67.7%</td>
<td>45.1%</td>
<td>20.6%</td>
<td>33.3%</td>
<td>54.3%</td>
<td>59.8%</td>
</tr>
</tbody>
</table>

Source: Smith Travel Research (STR)
Boise STR Average Daily Rate $

YTD: -14.7%

Source: Smith Travel Research (STR)
Ada Co. AirDNA Occupancy Rate %

YTD: -5.8%

Source: AirDNA
Ada Co. AirDNA Avg. Daily Rate $
Downtown Boise Device Activity

WoW: +2.4%
Impact Projections

Projected COVID-19 impact on tourism industry revenue

Source: Oxford Economics

Source: U.S. Travel Association and Oxford Economics
Recent Lodging Collections

<table>
<thead>
<tr>
<th>Month</th>
<th>FY2021 vs. FY2020</th>
</tr>
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<tbody>
<tr>
<td>April</td>
<td>-38.3%</td>
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<tr>
<td>May</td>
<td>-76.2%</td>
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<tr>
<td>June</td>
<td>-53.4%</td>
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<tr>
<td>July</td>
<td>-31.0%</td>
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<tr>
<td>August</td>
<td>-16.4%</td>
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Source: Idaho Tax Commission
FY21 Projection

Source: Idaho Tax Commission and Idaho Tourism Internal Projections

-19%
Top reasons visitors come to Idaho:

- visit friends and family
- experience the outdoors
- tour the region

Top 5 visitor activities in Southwest Idaho:

- shopping
- fine dining
- hiking/backpacking
- swimming
- landmark/historic site

75% of people are very satisfied with their overall trip experience

65% are very satisfied with the safety and security on their trip