

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?

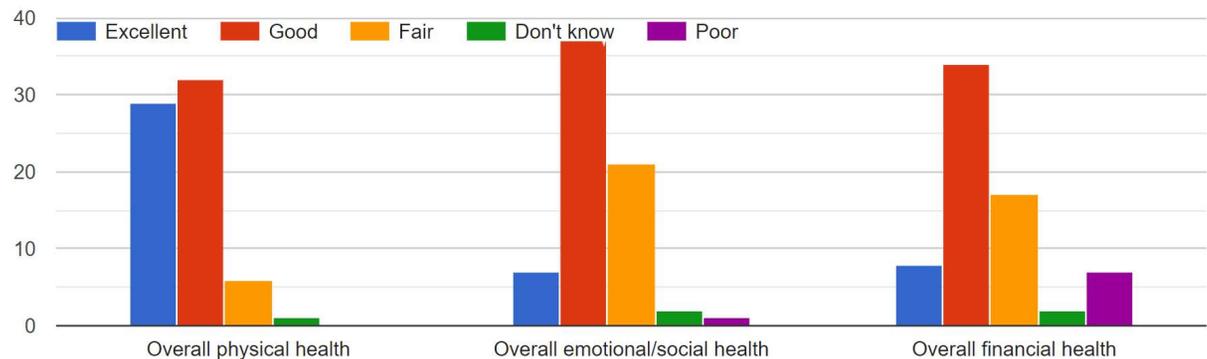
How's your emotional, physical, and financial health?

What are the ways in which you have been impacted in the last few months?

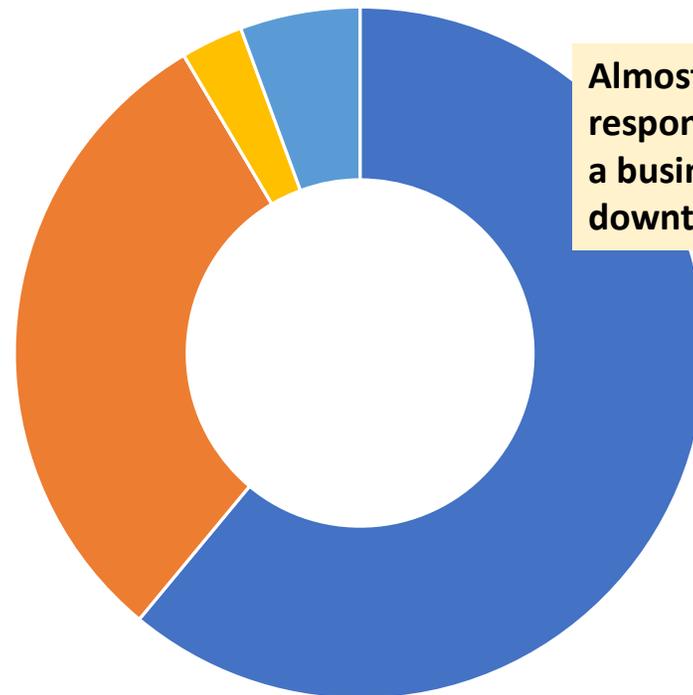
How's your business doing?

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?



Almost 70% of respondents own a business downtown.

- 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

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.

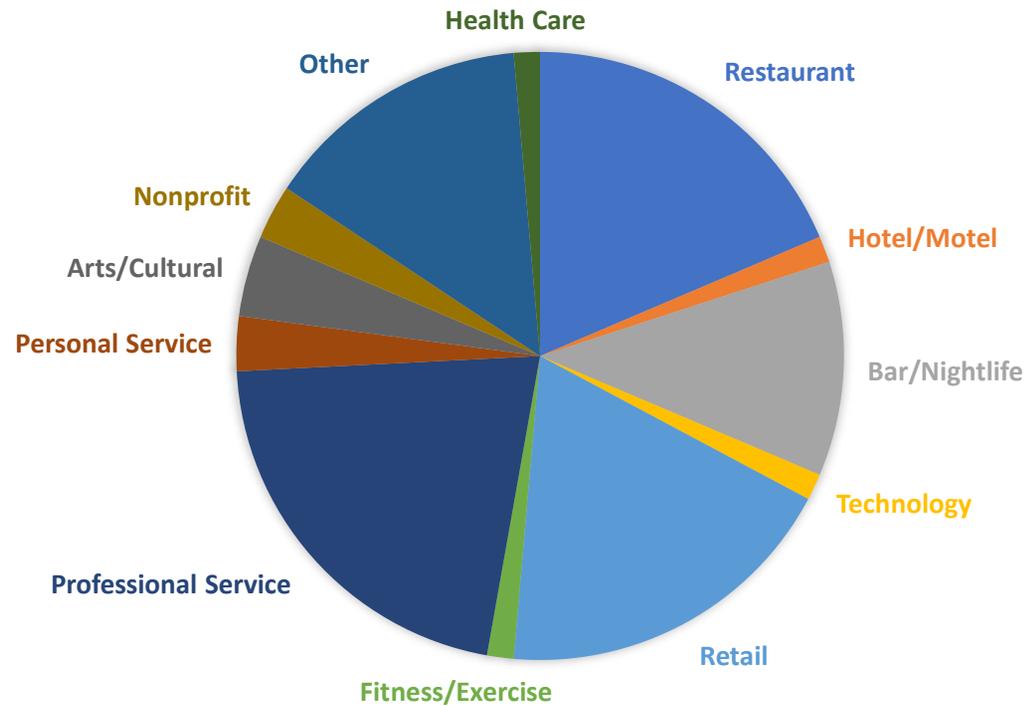
Source: LEHD On the Map – Primary Jobs (2017)

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.



Downtown Industries are Employers



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

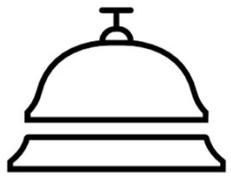


Retail:
12.1% of all employment in Idaho



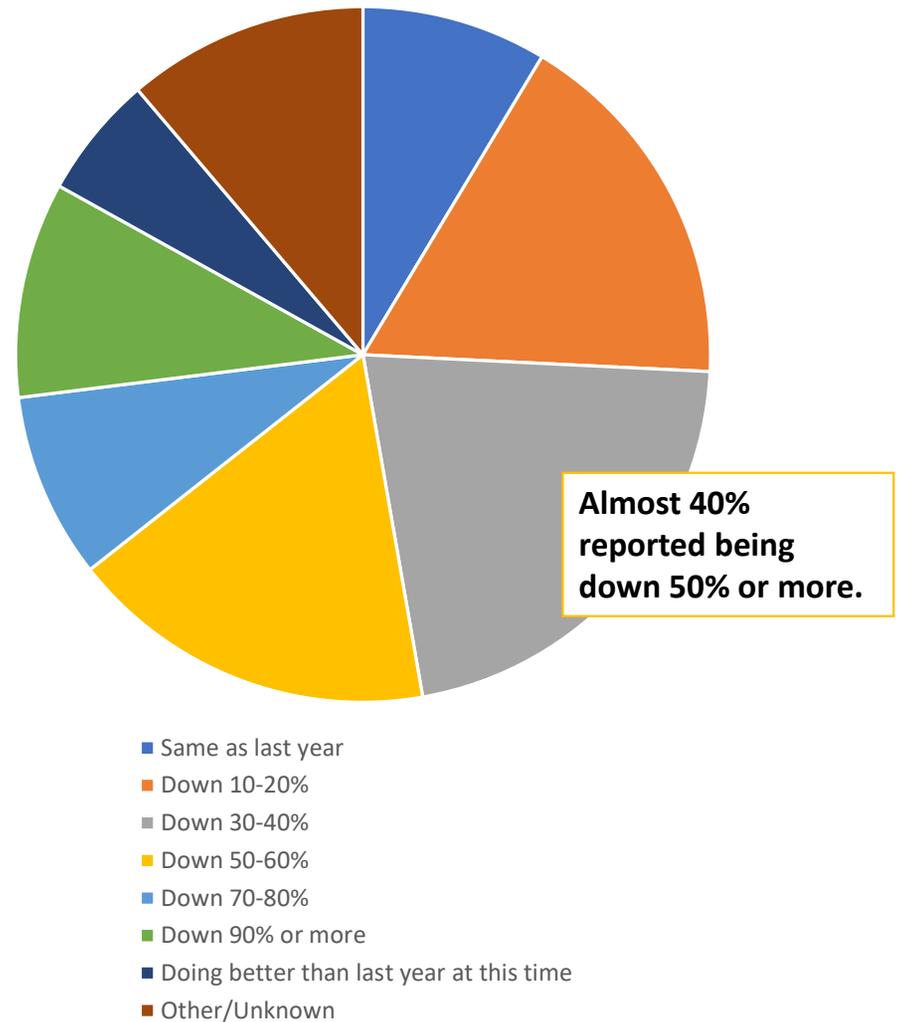
Professional & business services:
12.5% of all employment in Idaho

Source: Idaho DOL, 2017 Idaho Labor Market and Economic Report



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?



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

Consumer spending across all restaurants has fallen 21.4% comparing the first 7 months of 2020 to 2019.



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

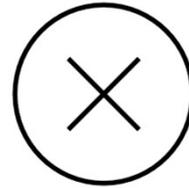
Personal care is up 2% from Q1

Recreational goods including books are up 8% from Q1

US consumer spending rose a moderate 1.9% in July



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

Question 6:
If you are selling products or taking orders online, what percentage of your business is done 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...

Very concerned Moderately concerned Slightly concerned Not at all concerned

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.

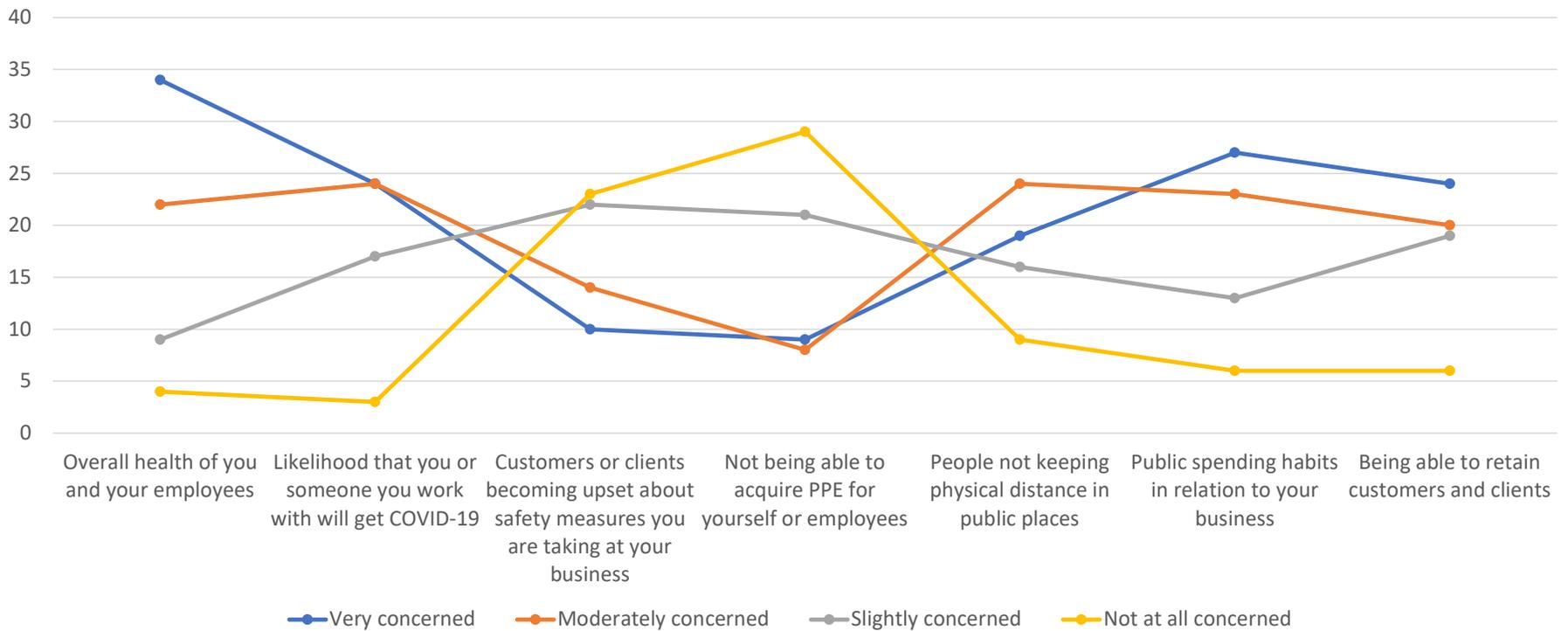
Additional Responses

- 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.

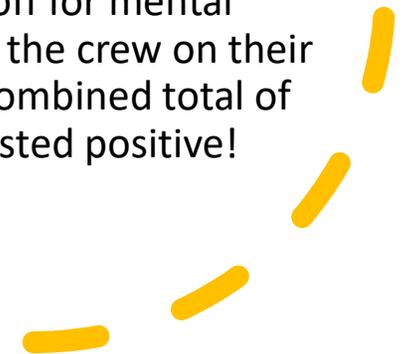
Question 9:

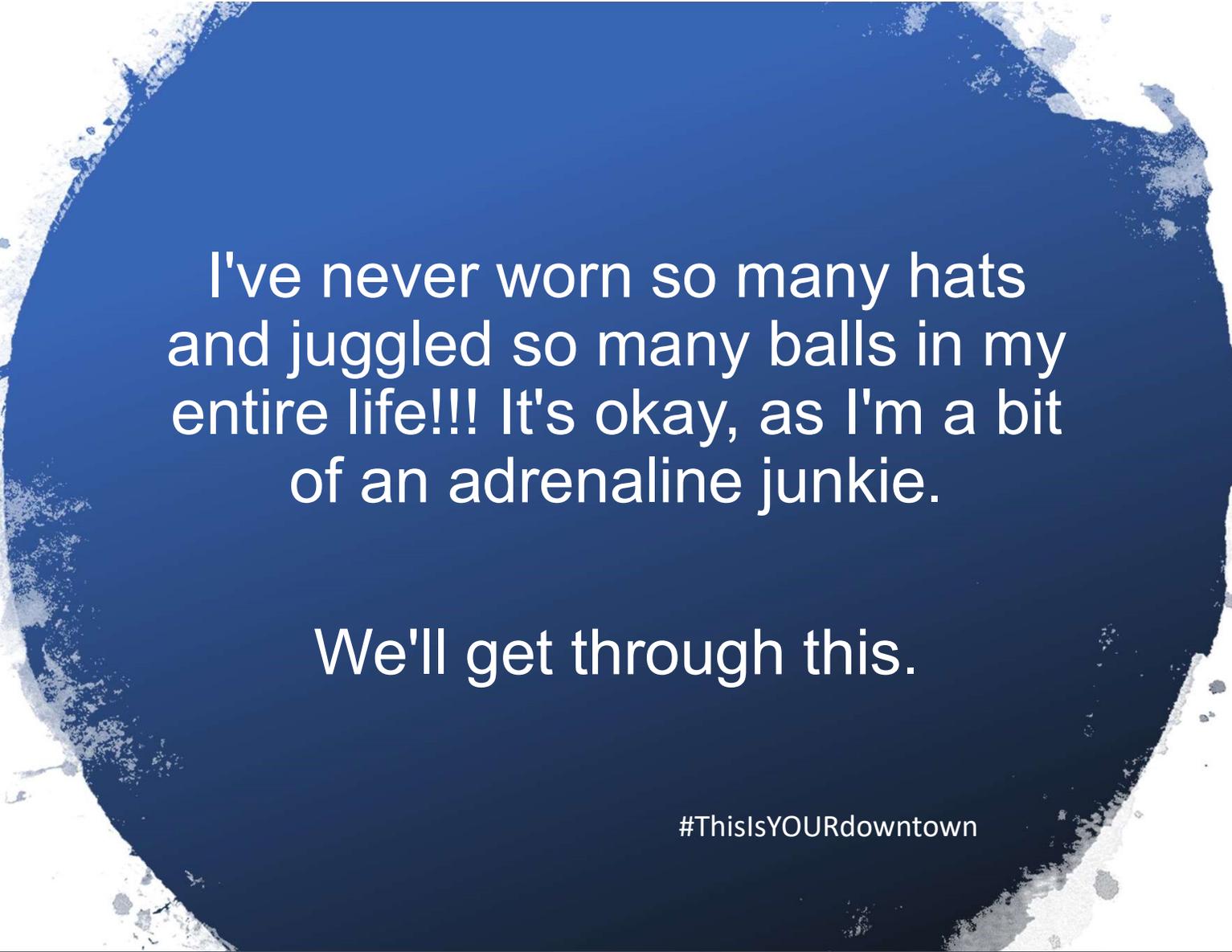
As normal activity resumes, how concerned are you about...



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.

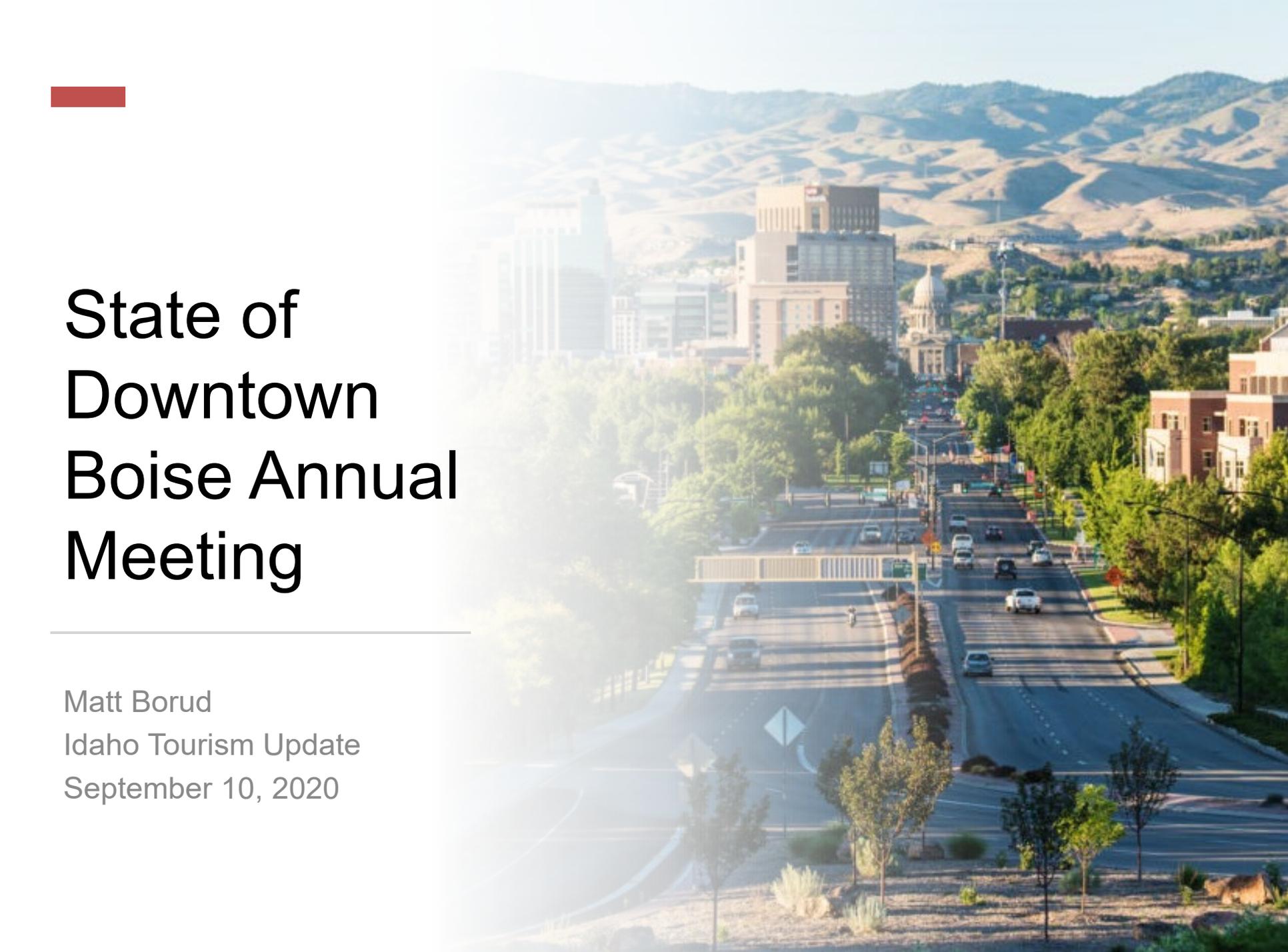
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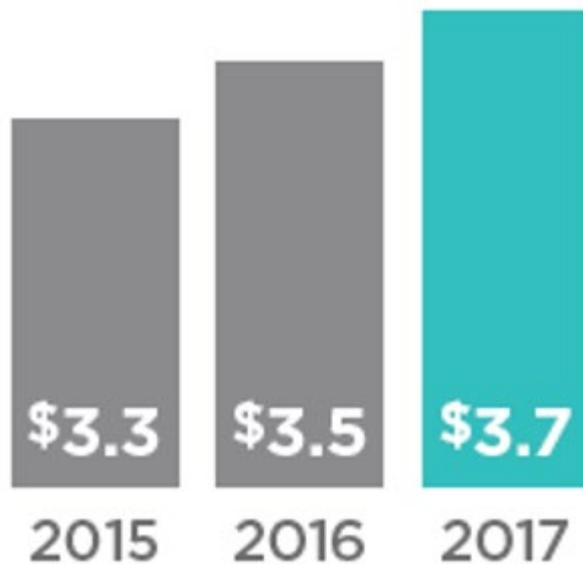


State of Downtown Boise Annual Meeting

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



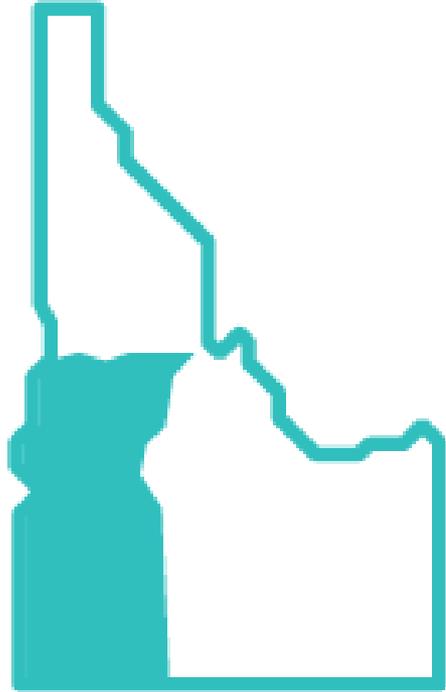
\$487M

entertainment



\$444M

retail sales



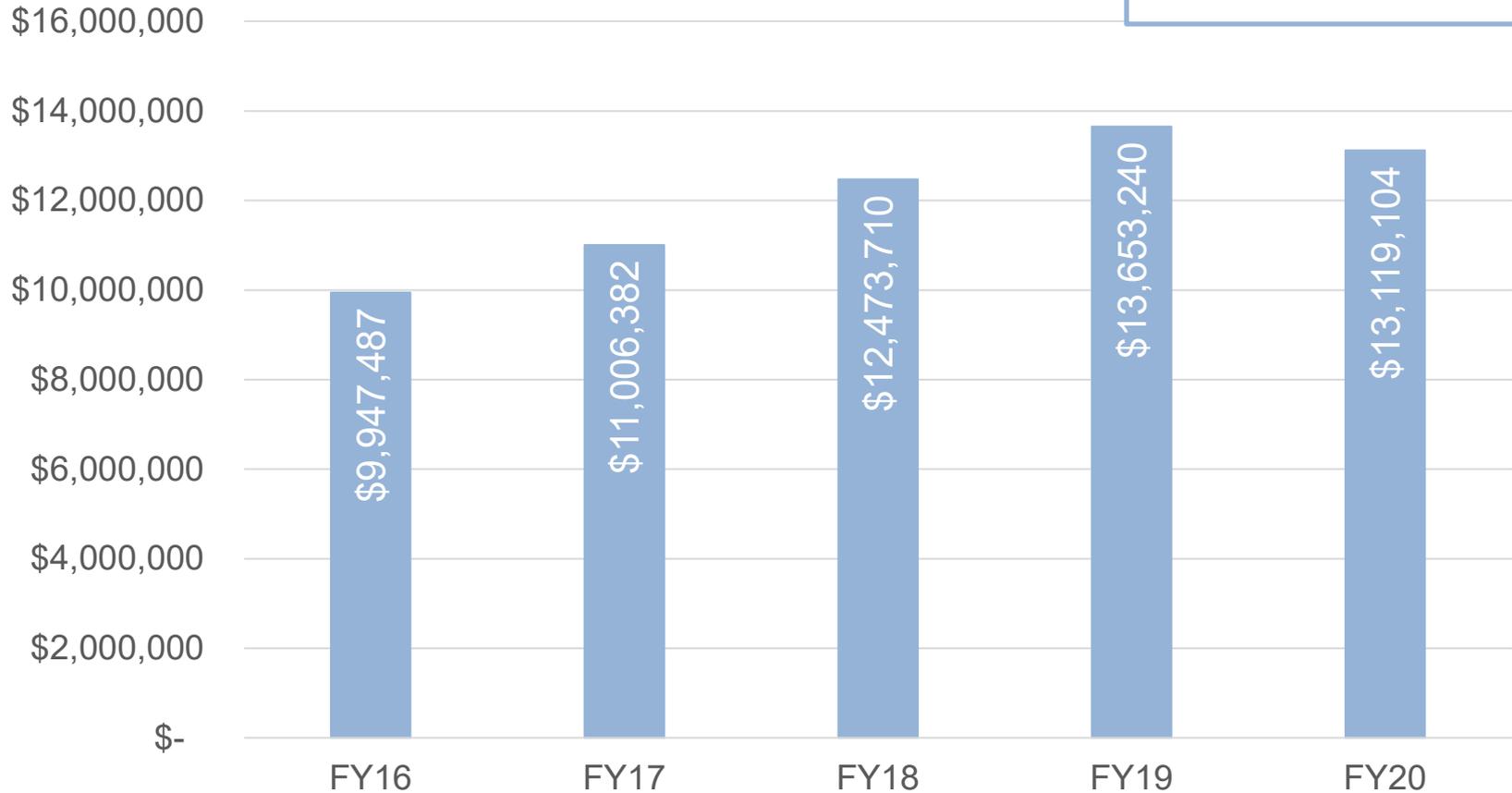
Traveler Spending

Amount spent in
Southwest Idaho:

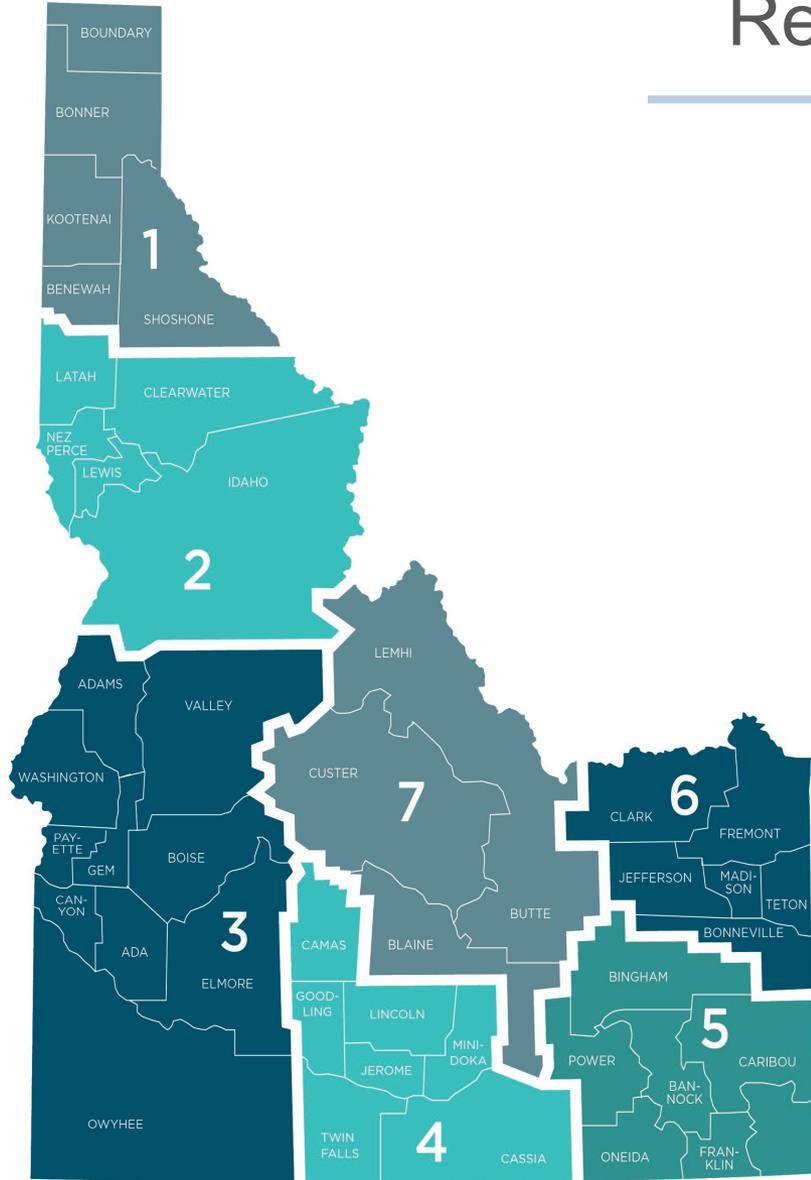
\$1.6 billion

Lodging Collections

-3.9%



Regional Lodging Collections



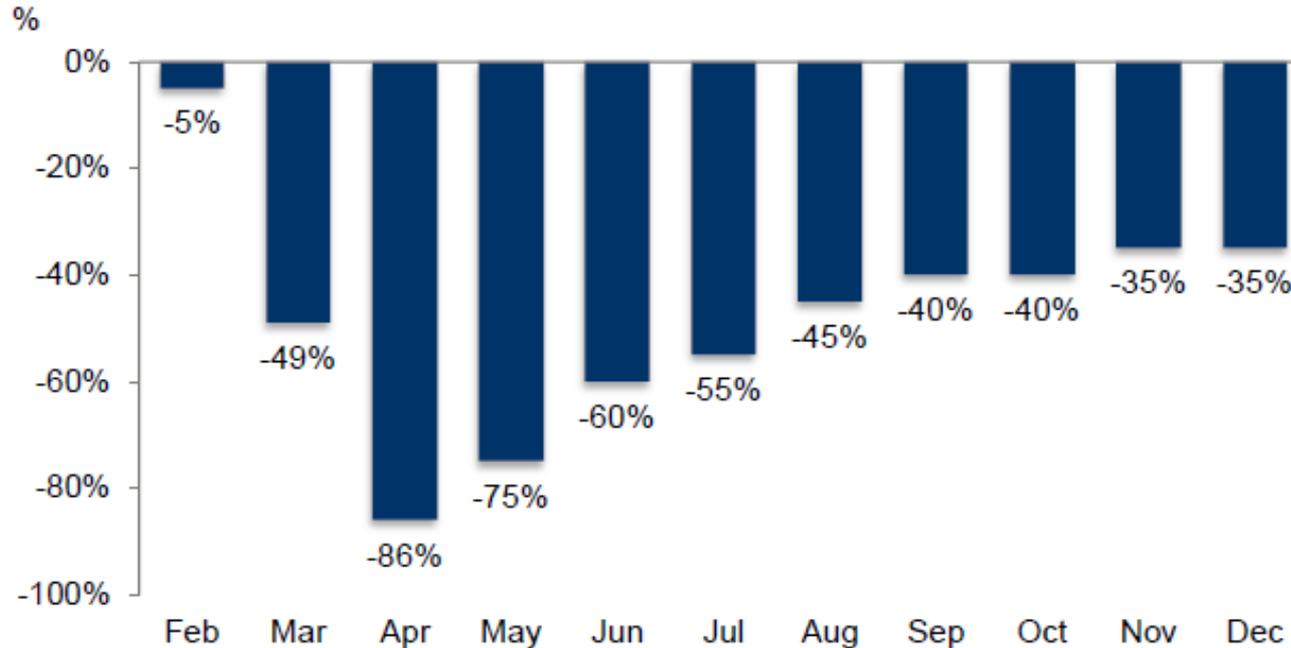
Region	FY20 vs. FY19 % Change
Region 1	-1.2%
Region 2	-13.2%
Region 3	-7.3%
Region 4	-10.6%
Region 5	-8.9%
Region 6	-2.8%
Region 7	3.8%

Source: Idaho Tax Commission



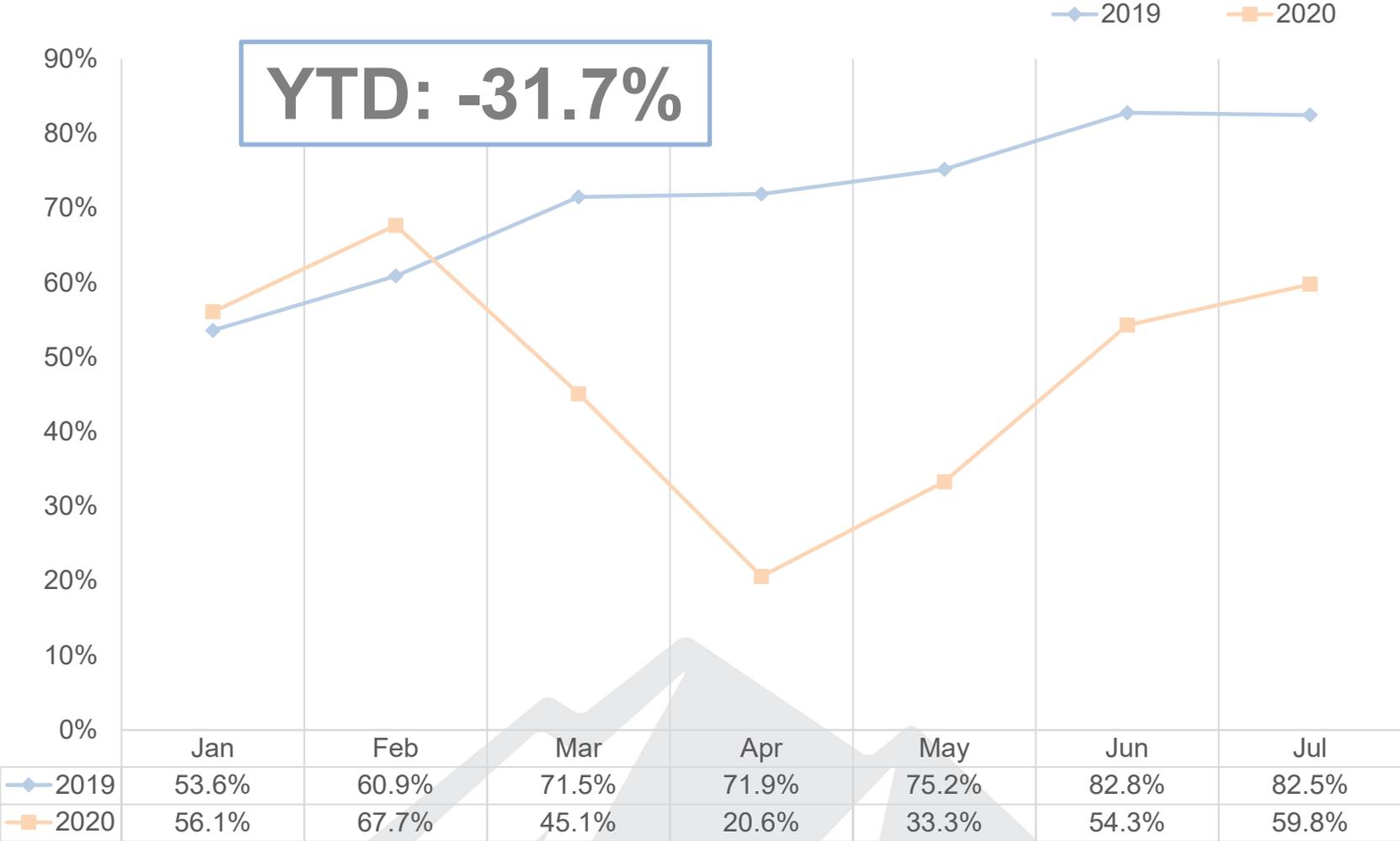
Impact Projections

Projected COVID-19 impact on tourism industry revenue



Source: Oxford Economics

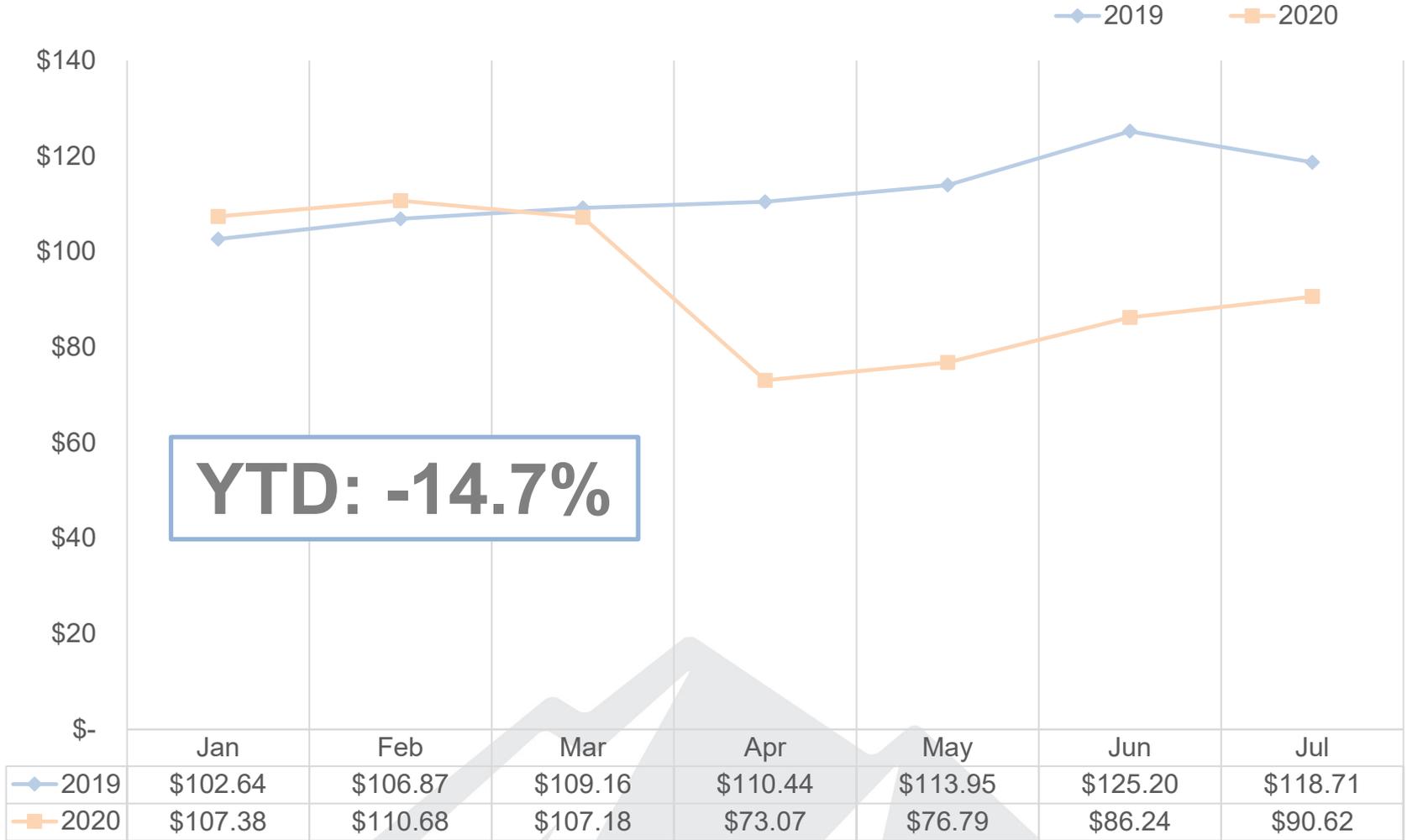
Boise STR Occupancy Rate %



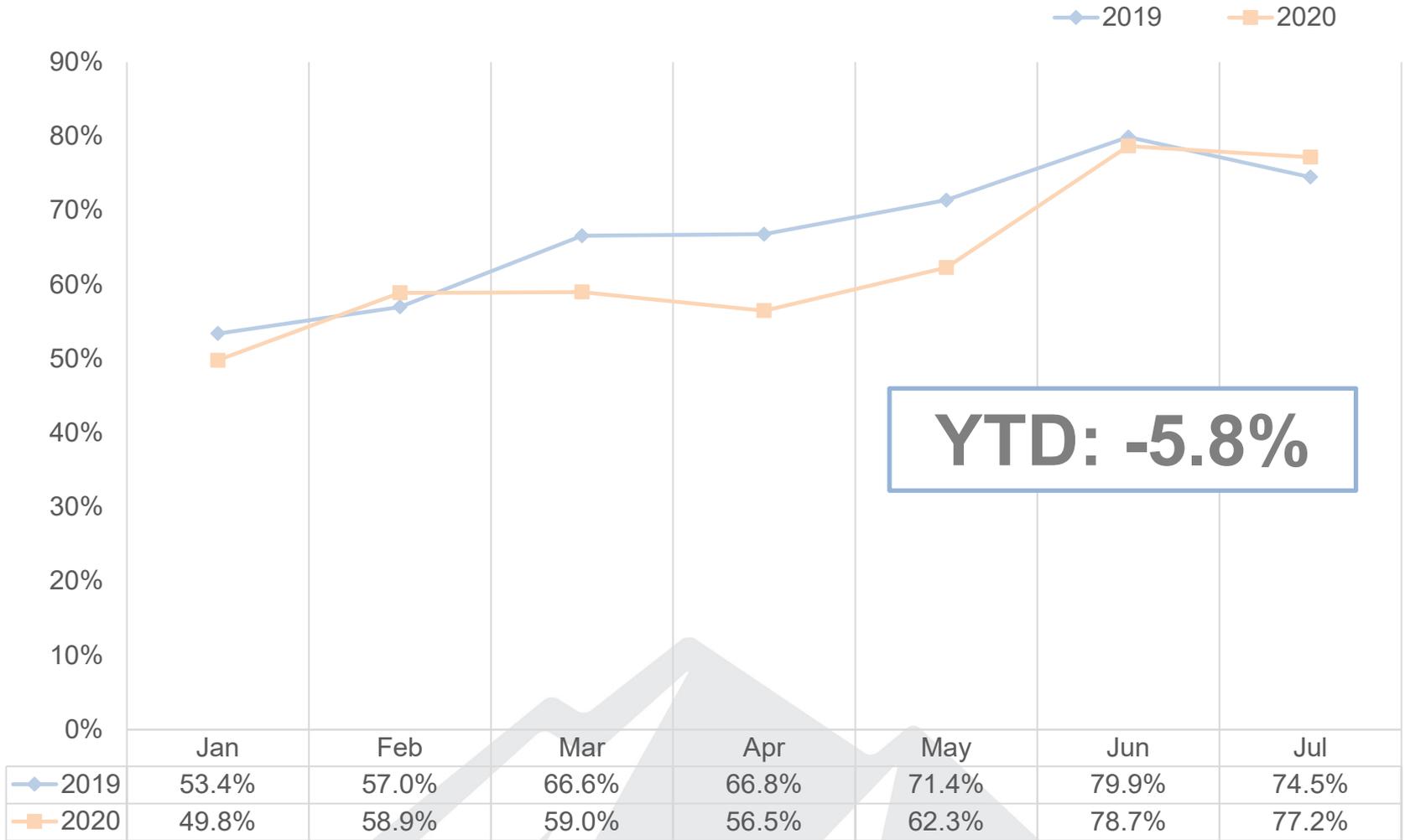
Source: Smith Travel Research (STR)



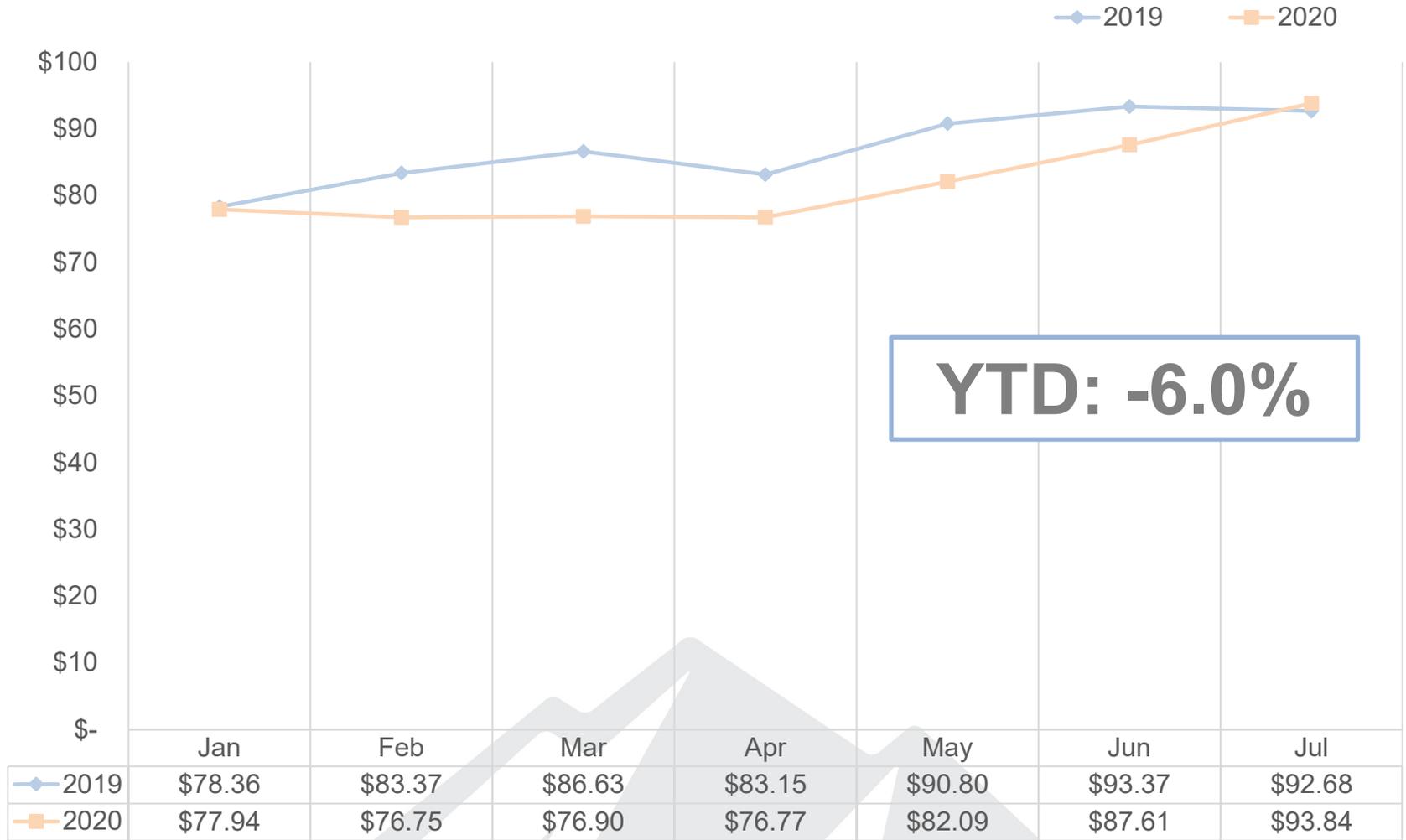
Boise STR Average Daily Rate \$



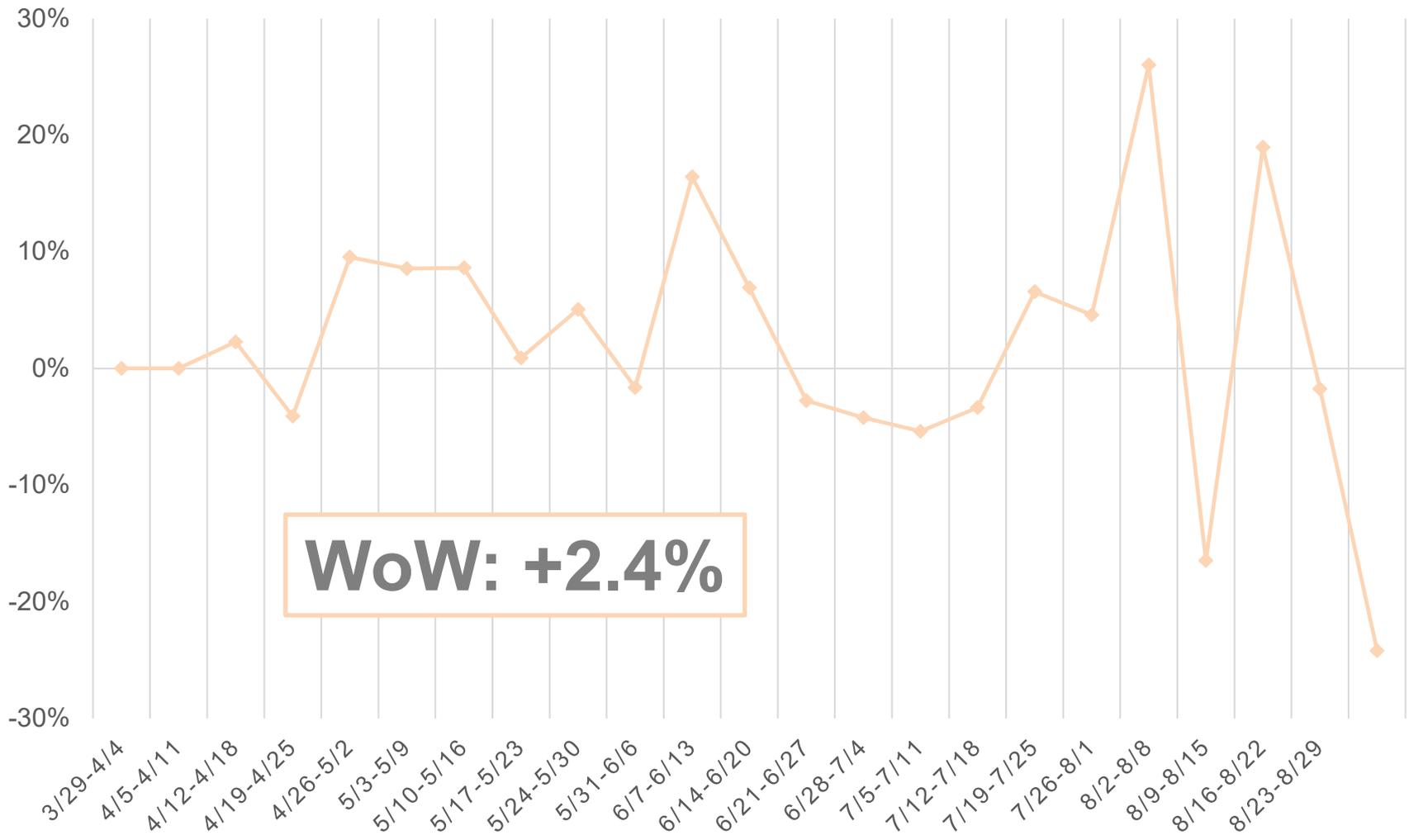
Ada Co. AirDNA Occupancy Rate %



Ada Co. AirDNA Avg. Daily Rate \$

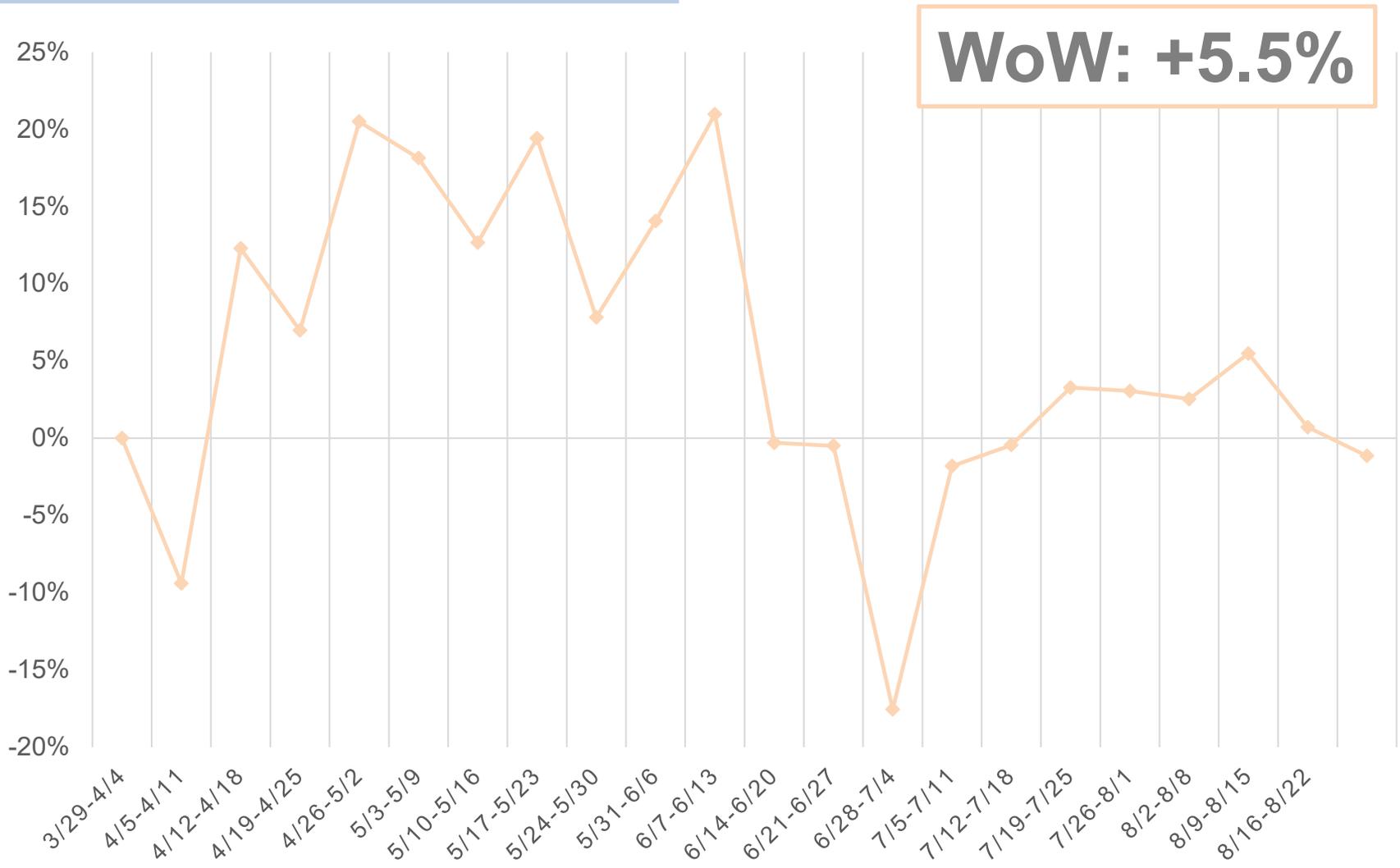


Downtown Boise Device Activity



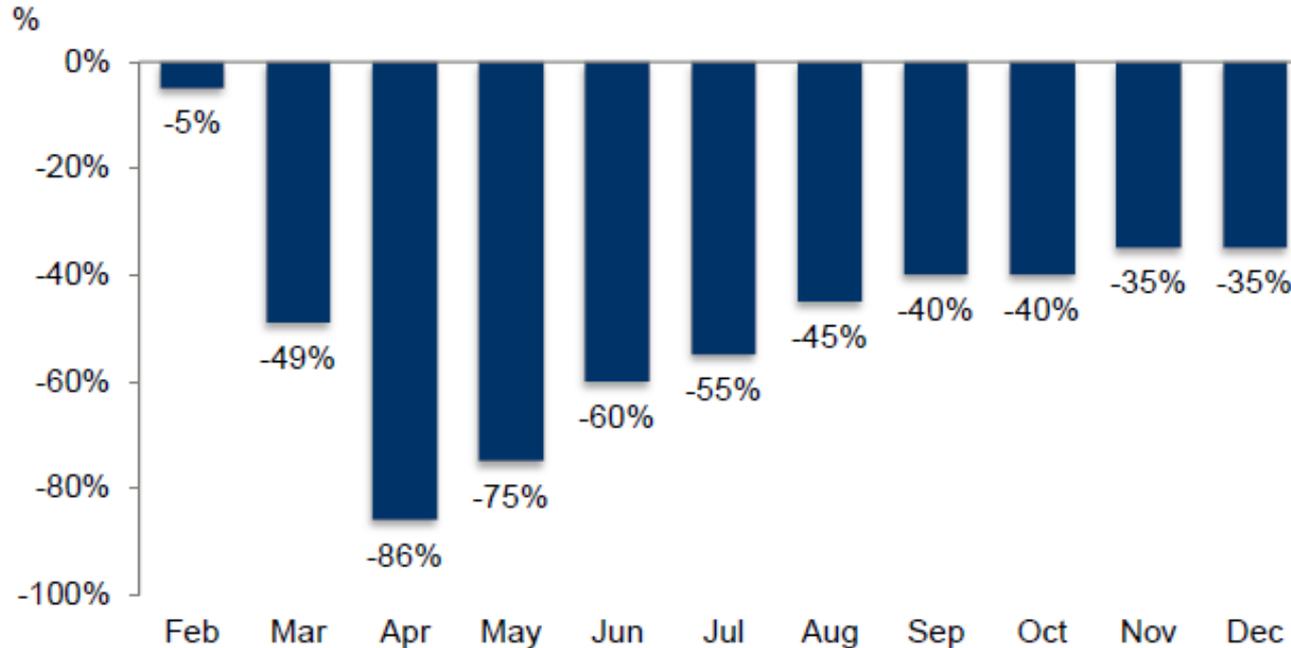
WoW: +2.4%

Boise "Search Shift"



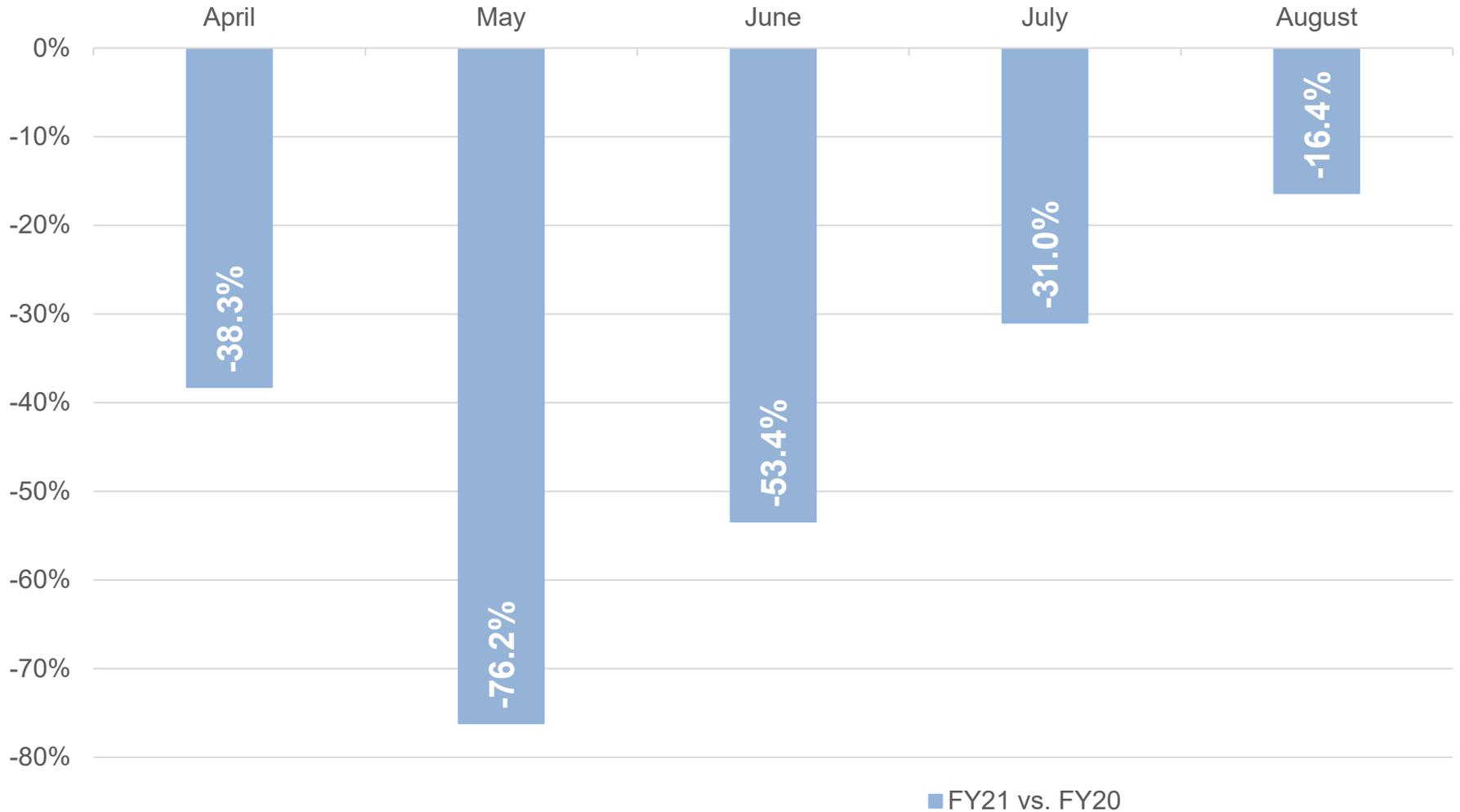
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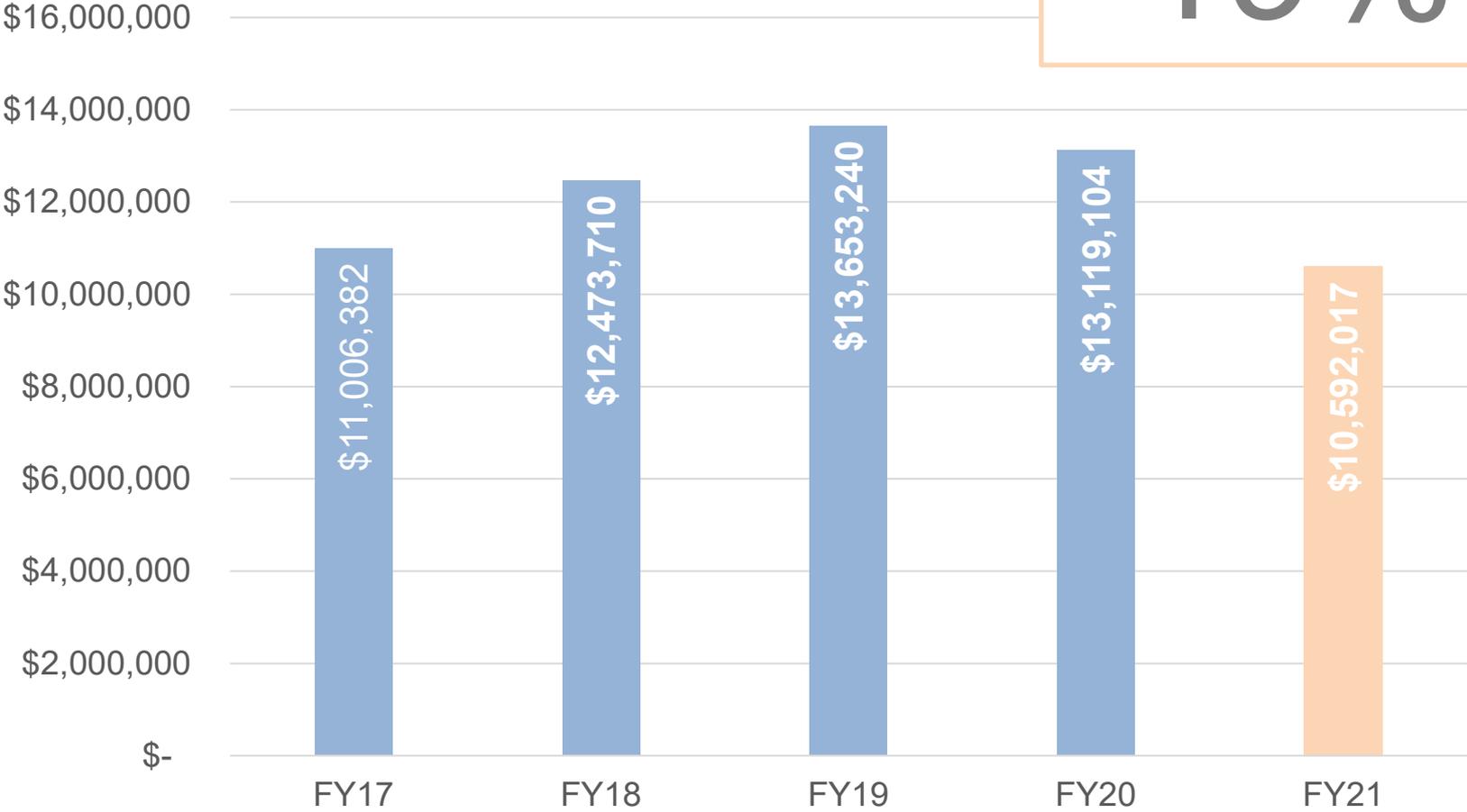
Source: Oxford Economics

Recent Lodging Collections



FY21 Projection

-19%



Source: Idaho Tax Commission and Idaho Tourism Internal Projections



Top reasons
visitors come
to Idaho:



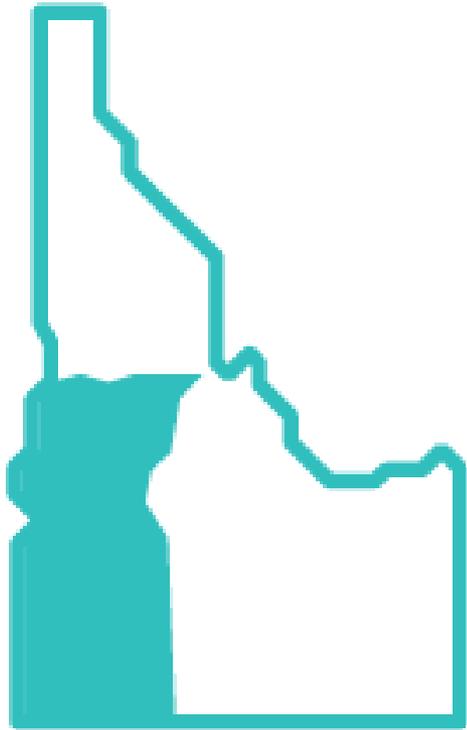
visit friends
and family



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





commerce.idaho.gov