

BUSINESS SURVEY RESULTS



BUSINESS SURVEY

Survey Overview

- **Downtown business survey distributed on February 15, 2022 (through March 18)**
 - Two versions of the survey: first floor businesses and office tenants
 - 154 total responses (60 responses from first floor businesses, 94 from office tenants)
- **Goals:**
 - Quantify the impact of the pandemic on downtown employers and consumer businesses
 - Understand the return to work plans and post-COVID workplace policies for office tenants
 - Gather input on potential DORA expansion
 - Gauge satisfaction with DDP services and efforts

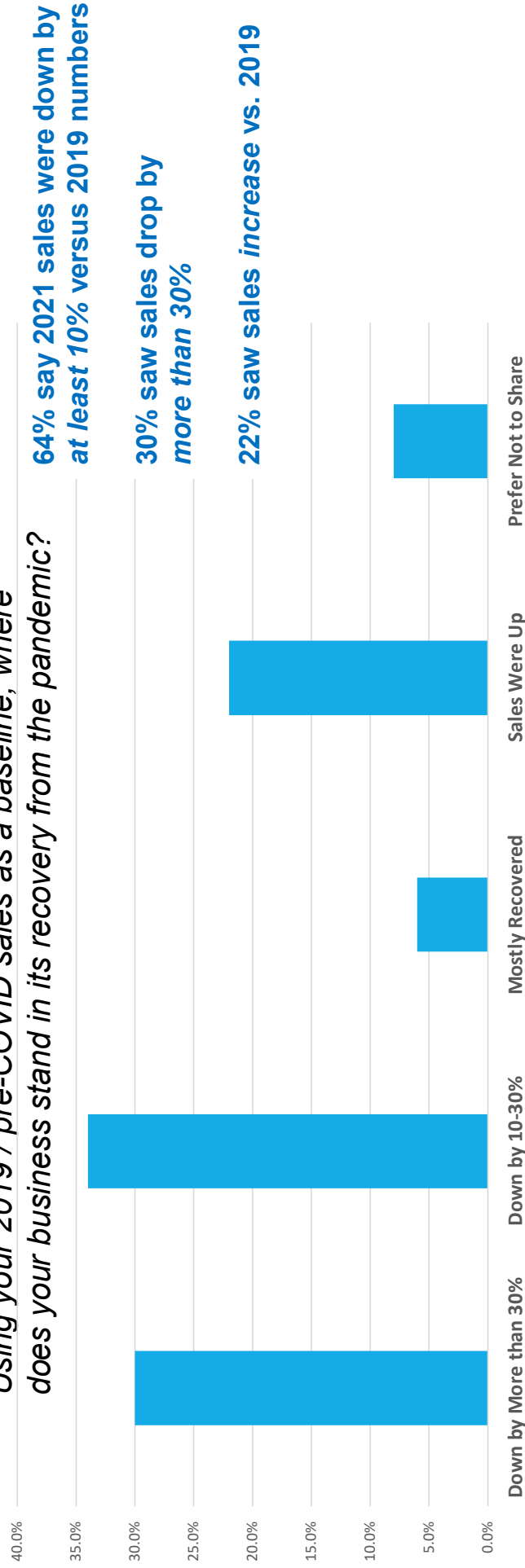
FIRST FLOOR / CONSUMER BUSINESS RESULTS

DOWNTOWN BUSINESS SURVEY

FIRST FLOOR RESULTS

COVID Recovery - Revenue

Using your 2019 / pre-COVID sales as a baseline, where does your business stand in its recovery from the pandemic?





FIRST FLOOR RESULTS

COVID Recovery – Top Challenges

- **Staffing shortages**
- **Supply chain delays & increased costs**
- **Fewer customers**
 - Downtown employees not back in offices yet
 - Changed lifestyles – people not going out as much, not spending as much, not gathering as much
- **Health and Safety**
 - Keeping staff and customers healthy
 - Keeping up with changing health protocols

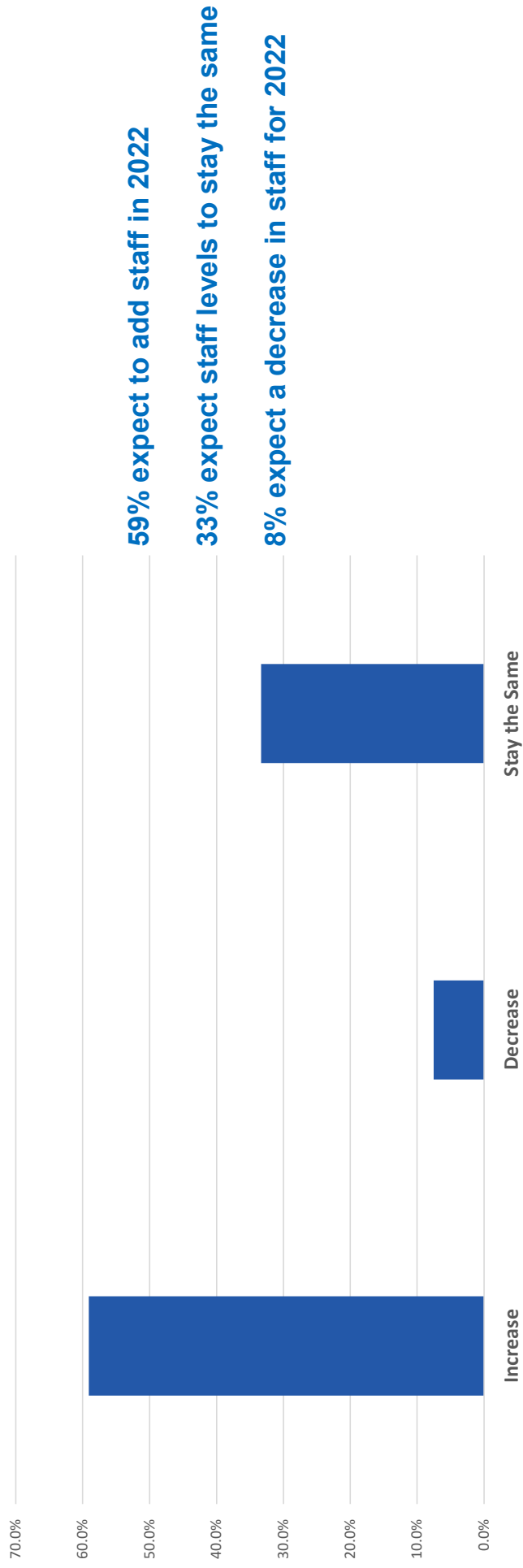
OFFICE TENANT RESULTS

DOWNTOWN BUSINESS SURVEY

OFFICE TENANT RESULTS

COVID Recovery - Staffing

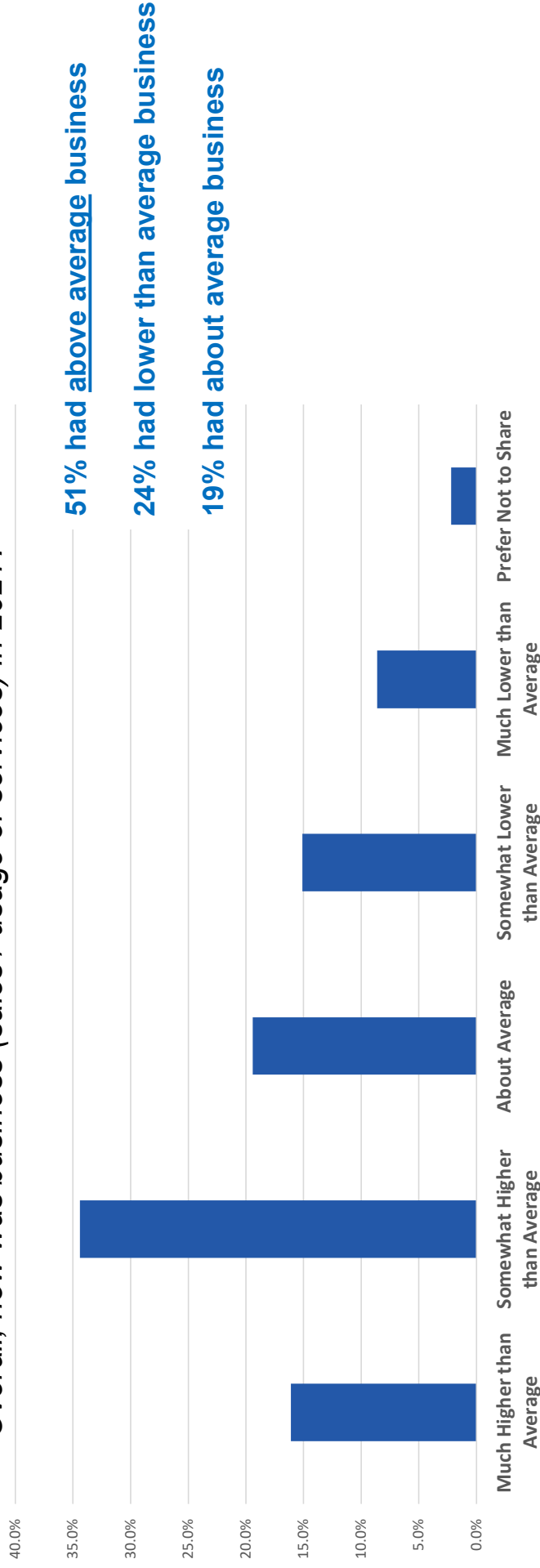
In 2022, do you expect your number of employees assigned to your downtown location to...



OFFICE TENANT RESULTS

COVID Recovery – Revenue / Patronage

Overall, how was business (sales / usage of services) in 2021?



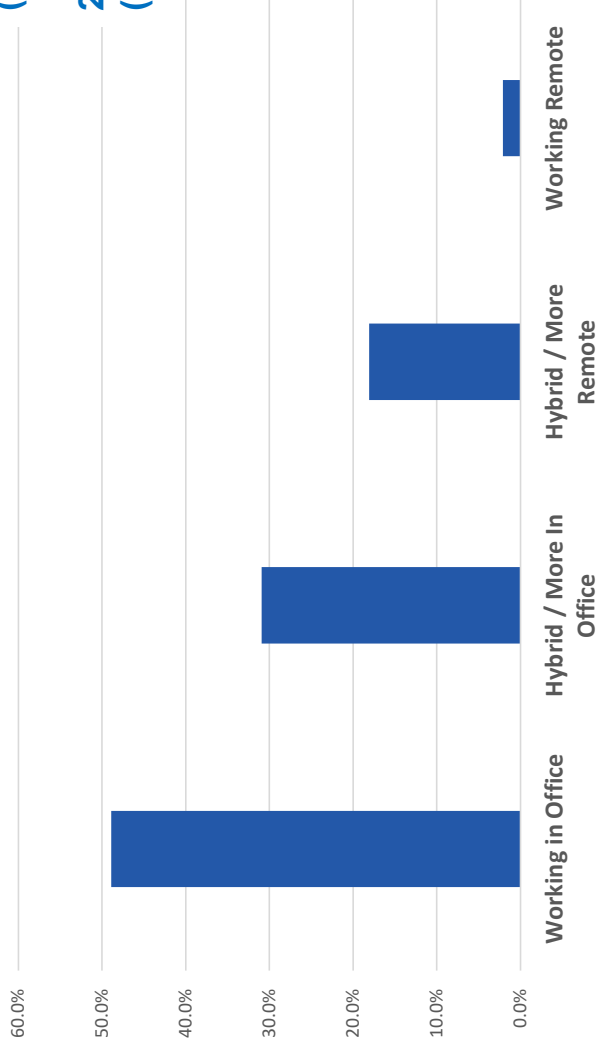
OFFICE TENANT RESULTS

COVID Recovery – Approach to Hybrid/Remote Work

Which of the following best describes your organization's current approach to work and the workplace?

**80% are working mostly or fully in the office
(31% of those have some remote work)**

**20% are working mostly or fully remote
(18% of those have some in-office work)**



59% say their current work approach is likely to be permanent

16% say it's a temporary policy that will last as long as the pandemic does

25% unsure how long it will last

OFFICE TENANT RESULTS

Changes to the Workplace

As you think about your organization's long-term approach to work and the workplace, which of the following are you considering? (check all that apply)

Reducing our workplace footprint / square footage	10%
Changing our workplace layout to create more private offices / distanced workspaces	5%
Creating "hot desk" workspaces that multiple employees can share for the days they work on site	11%
Adding more meeting spaces and workplace amenities to facilitate collaboration and culture between coworkers	11%
We may not need a dedicated office space / workplace at all	4%
I am not planning any changes to our workplace	70%



OFFICE TENANT RESULTS

COVID Recovery – Top Challenges

- **Staffing** (*biggest challenge listed by far*)
 - Loss of employees, hiring difficulties
 - Employees' desire for remote/flexible work
 - Keeping staff healthy/safe, absenteeism due to employees getting sick
 - Employees' mental health / burnout
- **Supply chain issues**
- **“No significant challenges”** (several office tenants say COVID has posed few, if any, challenges)



OFFICE TENANT RESULTS

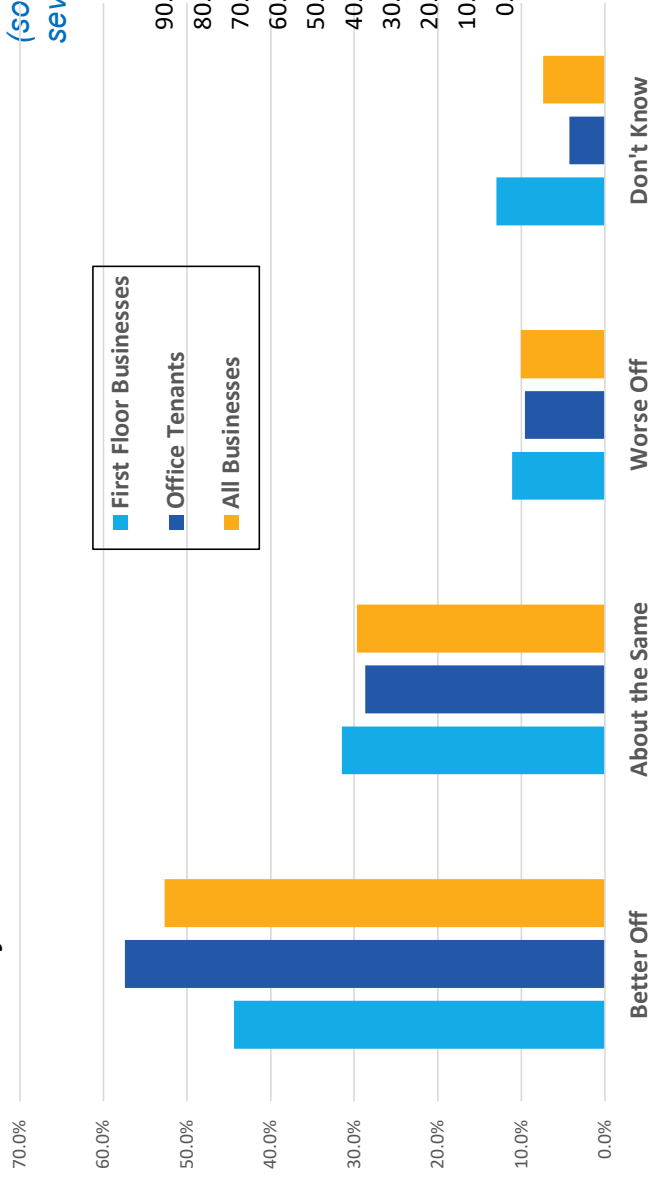
Additional COVID Impacts, Lessons, Comments, etc.

- A shift to **more flexible** work environments and working arrangements is expected – “workers are not going back to 8-5 every day”
 - Many employers are looking to reduce employees’ stress and make work more fun
 - A trend toward reducing office sizes is also expected
- Many industries that struggled early on are now seeing a **significant rebound** in customers / patrons – some setting record numbers
 - **DDP relief efforts** have been hugely helpful and very much appreciated
 - Our community has done so much to help those in need – **displays of kindness** have been numerous and noticed

BUSINESS SURVEY

State of Downtown

Compared to three years ago, I feel downtown Dayton currently is...

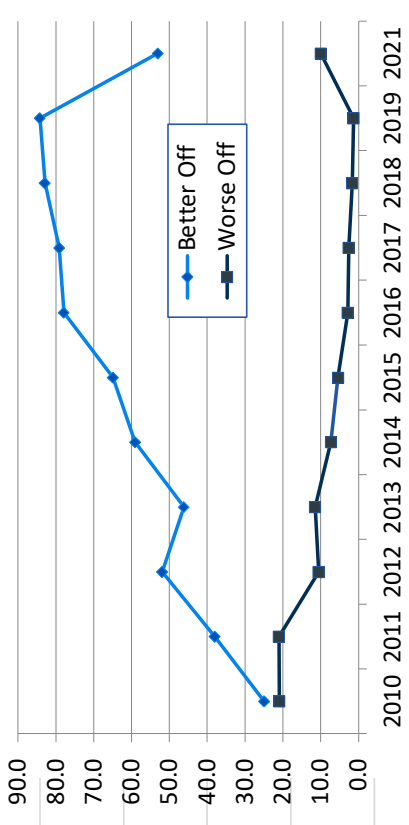


53% of all businesses think downtown is better off

30% say about the same

10% say worse off

(somewhat higher than usual - likely influenced by COVID - several businesses said as much in comments)

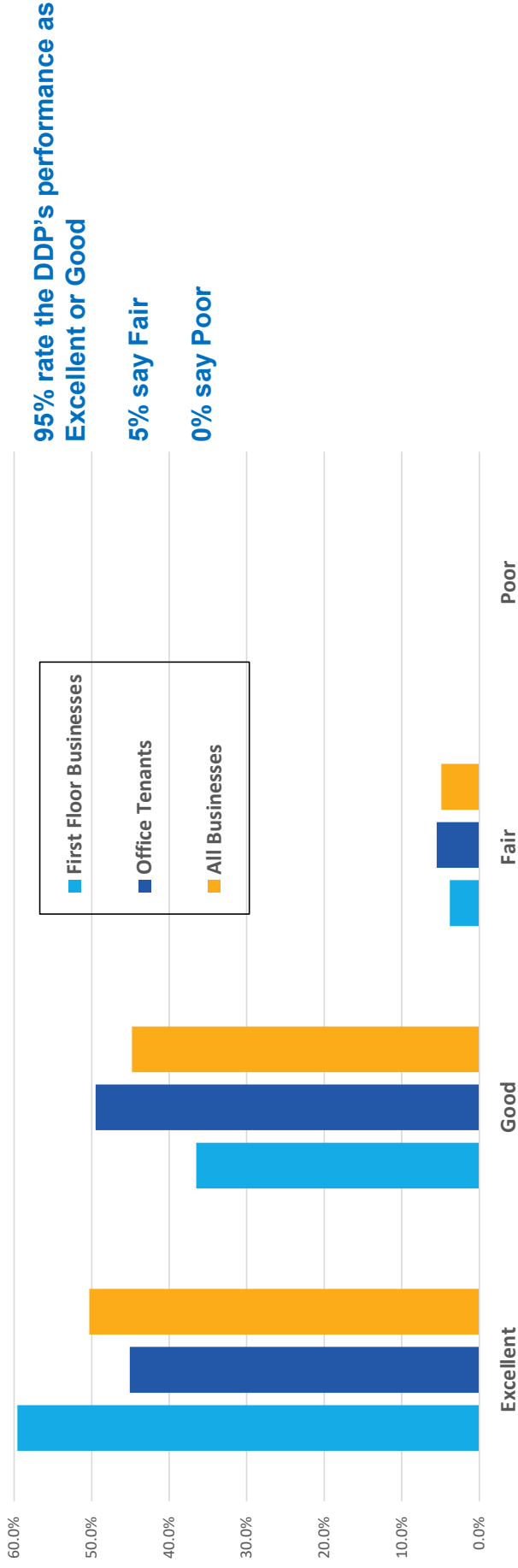


(*Question not asked in 2020 survey)

BUSINESS SURVEY

DDP Performance

Overall, how would you rate the job the DDP did in 2021?





BUSINESS SURVEY

Where should the DDP focus efforts in 2022?

- **Encouraging companies to bring workers back to downtown offices**
- **Filling vacant office space**
- **Attracting new businesses downtown**
 - Especially first-floor retail
 - Amenities (grocery, lunch restaurants)
- **Safety / incivility issues**
- **Environment** (beautification, streetscapes, placemaking, signage)
- **Parking** (increase spaces, reduce costs, modernize payment methods, more electric vehicle stations)
- **Supporting more housing / residential growth**

BUSINESS SURVEY

Support for DORA Expansion

