

ANNUAL BUSINESS SURVEY

What are we hearing?

FIRST FLOOR BUSINESSES

- **Revenue:** 78% report 2020 declines of at least 26-50% (1 in 3 report 50-80% or more)
- **Staffing:** less impacted – 63% report a 2020 decline of less than 25% (but 1 in 3 say 26-50% or more)
- 3 out of 4 businesses believe they will survive through the next 4-6 months; lunch businesses most at risk
- Most important 2020 relief efforts to businesses: Re-open grants, relief program communications, and gift cards

OFFICE TENANTS

- Remote Work Trends
 - Pre-COVID: 63% work entirely in-office
 - Post-COVID: 59% expect some hybrid / remote; but still biased (2/1) towards in-office
- 39% say organizational culture has “worsened” during the pandemic
- Office Space Changes
 - 20% expecting to reduce office footprint
 - 51% not anticipating any changes to their office layout

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OFFICE TENANTS

- **Remote Work Trends**
 - Pre-COVID: 66% work entirely in-office
 - Post-COVID: 57% expect some hybrid / remote; but still biased (2/1) towards in-office
- 35% say organizational culture has “worsened” during the pandemic
- **Office Space Changes**
 - 17% expecting to reduce office footprint
 - 52% not anticipating any changes to their office layout

ANNUAL BUSINESS SURVEY

Recovery Plan Initiatives

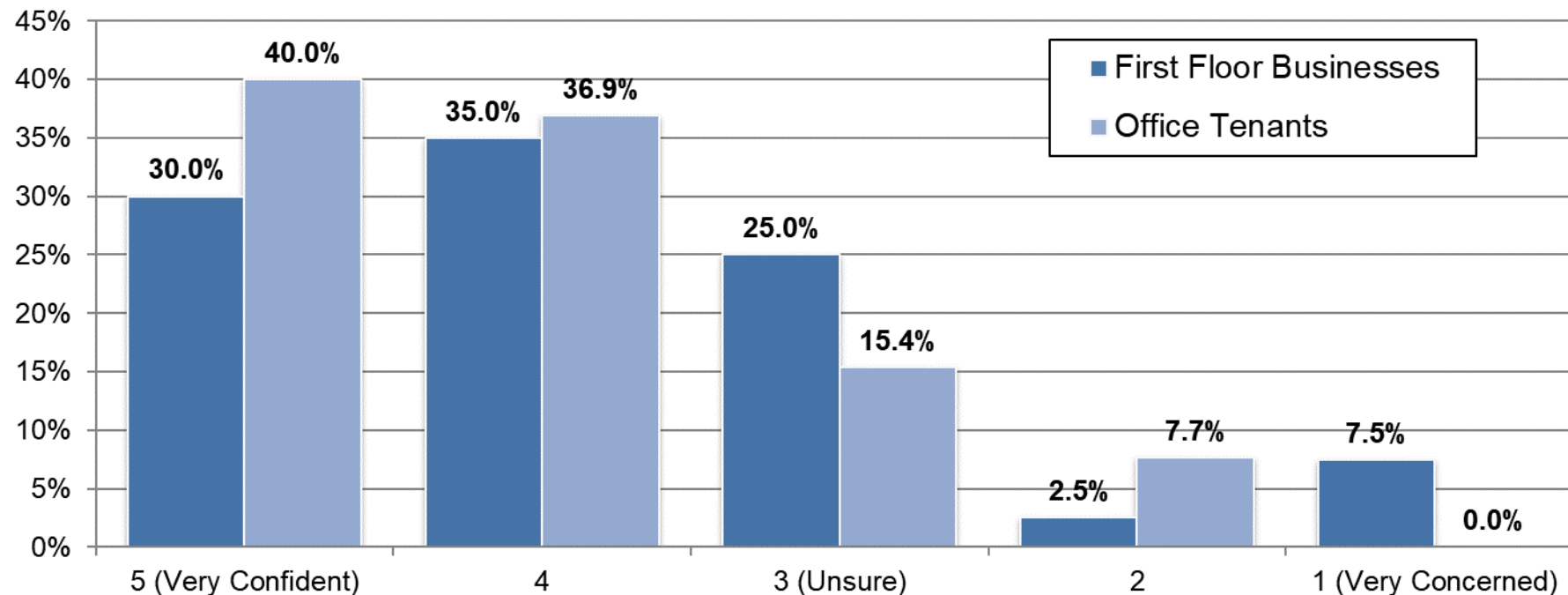
Please rate the following COVID recovery initiatives based on how important you feel they are to downtown:

RECOVERY PLAN AREA	FIRST FLOOR BIZ % “VERY IMPORTANT”	OFFICE TENANTS % “VERY IMPORTANT”
Supporting first-floor retail, restaurants, and other amenities	71.8%	45.2%
Encouraging employers to bring their employees back downtown	76.3%	46.0%
Helping office buildings adapt to the post-COVID workplace	52.6%	34.9%
Hosting events and programs to bring the public downtown	81.1%	46.0%
Supporting startup businesses and entrepreneurs	60.0%	38.1%
Making the expanded first-floor patio spaces permanent	47.4%	49.2%
Enhancing streetscapes and other public spaces	52.5%	38.7%
Expanding outdoor recreation amenities	55.0%	37.1%
Continuing the momentum in downtown development	82.5%	74.2%

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Confidence in Downtown's Recovery

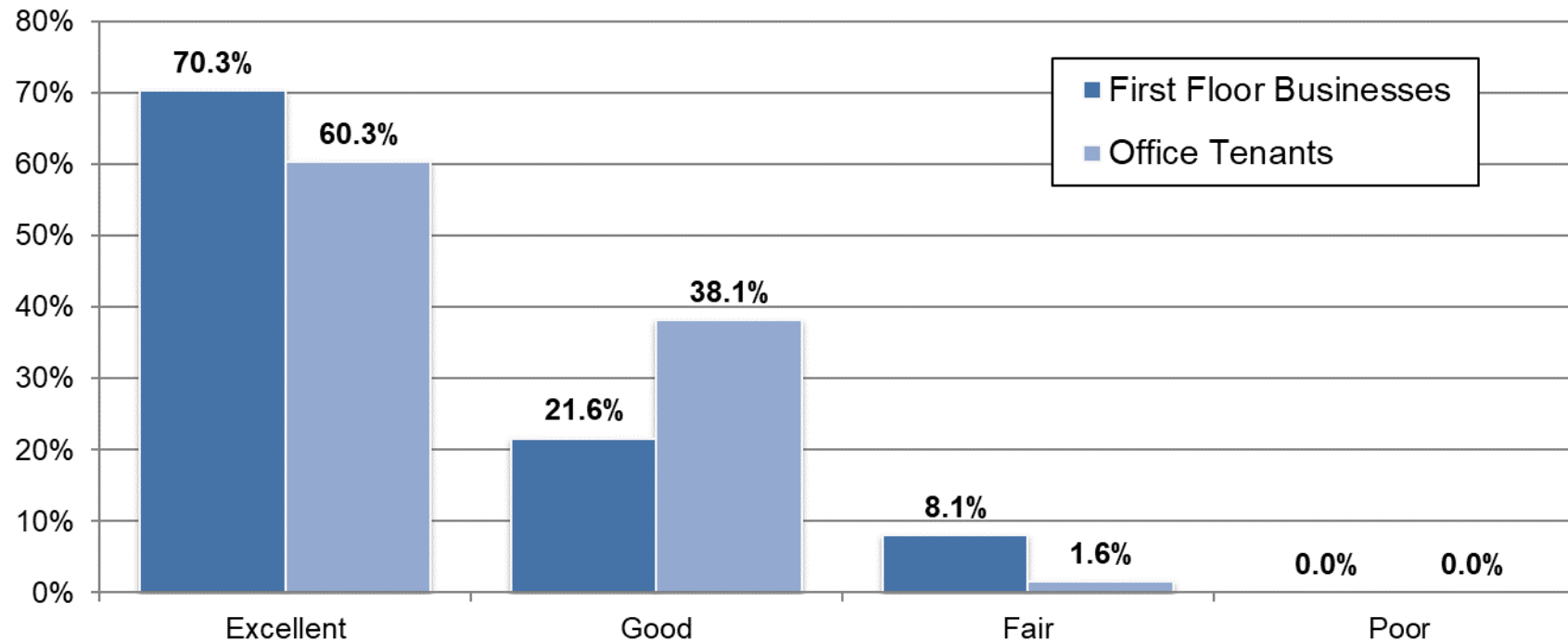
On a scale from 1 to 5, how confident are you that downtown will bounce back from the pandemic?



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DDP Job Performance

Overall, how would you rate the job the Downtown Dayton Partnership did in 2020?



DOWNTOWN RECOVERY PLAN

Proposed Subcommittee Structure

SUBCOMMITTEES	SUBCOMMITTEE FOCUS AREAS
Arts / Venues / Events	arts / venue recovery issues, also how to bring people back downtown this summer / fall
Office	future of office, defense industry opportunities, startup ecosystem
Downtown Development	future of development, financing challenges, new financial tools
Outdoors & Recreation	how to leverage additional demand for outdoor spaces, near-term Riverfront Plan development
First Floor & Small Biz Relief	first floor business recovery issues, relief programs, bringing people back downtown this summer / fall
Public Realm & Transportation	long-term approach for pop-up patios / public realm changes, federal infrastructure funding opportunities
Residents	how to activate and engage residents in downtown's recovery
Marketing	promoting the re-opening of downtown Dayton through a cohesive marketing strategy