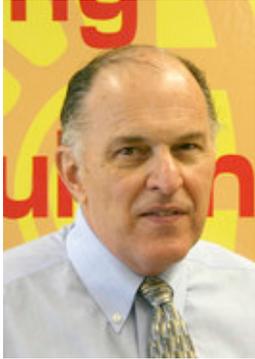




Downtown El Paso Survey-Census 2011



“Downtown is on the edge of the greatest potential for growth and improvement that we have seen since the early 1970s. To foster new business growth and create a clear, concise image of downtown, the Downtown Management District aims to become the clearinghouse of all-things downtown and the driving force of revitalization for the city. We have to communicate with one clear voice what is the future and direction of Downtown El Paso.”

Robert S. Ayoub, Board President
El Paso Downtown Management District (DMD)

I would like to introduce the first Downtown El Paso survey-census ever conducted.

The El Paso Downtown Management District (DMD) partnered with the Institute of Public Policy and Economic Development (IPED) of the University of Texas at El Paso and Strategic Communication Consulting Group, to conduct a comprehensive survey-census targeting downtown employers, employees, and households in El Paso County. This information has been collected to recruit property owners and retailers to downtown, and create more opportunities for restaurant, housing, and office space developments.

In this digital age, there is great value in sharing and having this information available. It helps provide a baseline for future downtown investments, and in the end targets our resources to really take Downtown El Paso to the next level. This information also dispels misinformation and creates the benchmarks needed to improve the city’s center of civic and cultural life.

This is the first study providing key demographics for downtown. For those of us who want to *live, work, play, and connect* in Downtown El Paso, we already see great change happening everyday. We see a renewed focus on downtown revitalization, paving the way for new storefronts and a unified effort to bring business and jobs back to our city’s core.

We are on a path to create the next great urban downtown with a sense of community and a feeling of a true neighborhood. We already see this when people enjoy the next great art event or the trendiest new music venue. There are signs that our city’s downtown is not solely for visitors or city jobs, but in time will become a place for future homeowners and businesses.

The following summary gives you the playbook of downtown's core numbers. You will see where people work and spend their money, and in time we hope to provide this survey-census information on a regular basis to compare and improve upon.

With a tough economy nationwide, you will certainly be surprised how our downtown continues to grow, which translates into more housing and attractions in the near future. This is about learning, and the time is now to take charge and really promote downtown in a way that hasn't been done in more than three decades. On behalf of the Downtown Management District (DMD), we are your new one-stop source for all things downtown, and we look forward to helping you if you have any questions. You can contact us at (915) 400-2294 or at info@elpasodmd.org. Our new downtownelpaso.com website is in the works, but in the meantime you can also visit us at www.facebook.com/elpasodmd.

Welcome to Downtown El Paso on the behalf of the DMD Board of Directors!

- Robert S. Ayoub, Board President, Downtown Management District (DMD)

Demographic Summary

Background and Purpose

The El Paso Downtown Management District (DMD) is a municipal management district directed by a volunteer Board of Directors comprised of Downtown property owners, business representatives, tenants, and community leaders. The Mission of the DMD is to make Downtown El Paso the center of commercial, civic, and cultural activity.

This demographic study was conducted to provide key information about who *lives, works, plays and connects* in Downtown El Paso. This vital information will be used to proactively recruit and retain entrepreneurs, businesses, restaurants, retailers, commercial and residential property owners, and other amenities in Downtown El Paso.

The DMD retained the services of Strategic Communication Consulting Group in partnership with the Institute of Public Policy and Economic Development (IPED) of the University of Texas at El Paso, to manage and conduct a comprehensive survey design compiling demographic characteristics for three target audiences: 1) employers in downtown; 2) employees in downtown; and 3) general households in El Paso County.

The purpose of the survey-census is to extract key data and impressions concerning downtown as a commercial center, as well as an entertainment and cultural venue. The DMD and the City of El Paso will analyze the information and use the data to formulate a comprehensive plan on the marketing and promotion of downtown, as well as to better address the needs of the downtown business and residential populations.

Methodology

The 2011 survey-census was facilitated by a self-selected sample in the Downtown El Paso area. To publicize the survey, the DMD did proactive outreach to downtown stakeholders, including restaurants, retailers, businesses, and other commercial and governmental entities. A combination of online and drop-off surveys were utilized, including Spanish-language surveys when needed. A total of 2,254 usable surveys were received with a 95% confidence level.

Key Findings

Downtown Employers

Employment: 38% of downtown employers represented the accommodation and food services industry, including public administration-related jobs.

Business occupancy and tenure: 39% of downtown employers owned their own building. A third of all downtown employers (34%) have been in business for more than 50 years. 15% of downtown employers indicated they have been in existence between 11 and 20 years, and just under 17% reported being in business between 21 and 30 years.

Employee composition: 39% of businesses, whether they employed part-time or full-time positions in the downtown area, had less than 10 employees.

Business relocation and job retention: A majority of downtown employers reported they did not plan to relocate in the next year (84%). Almost half of downtown employers (49%) have had no change in their employment in the last 12 months.

Business costs: Half of all downtown employers indicated that they had no change in space allocation or equipment needs in the past 12 months (50%). Only half of downtown employers reported that they had some increase in their overall costs for operating their business (48%).

Business revenues: 29% of downtown employers reported no change in their overall revenue in the past 12 months. In comparison, 29% indicated some increases in revenue while 22% of others reported some decreases in revenue during the same time period. A good proportion, or 38% of downtown employers, believe Juarez-related violence has had no impact on their business revenue.

Downtown events and promotions: Downtown employers reported two primary ways they become aware of incoming events and activities in downtown: newspapers (31%) followed by word of mouth/friends (25%).

Downtown Employees

Ethnicity: More than half of downtown employees self-identified as Hispanic (67%), compared to employees who identified as White, Non-Hispanic (28%) and all other ethnicities surveyed were under 1%.

Gender: Nearly 60% of employees that responded were female, compared to 39% of male employees.¹

Age: Nearly 29% of downtown employees were between the ages of 45-54 years old, followed by 22% of employees who were between the ages of 25-34 years old and 35-44 years old; 19% of employees self-reported their age between 55-64 years old. Less than 3% of downtown employees were under the age of 24 years old and less than 4% of downtown employees were over the age of 65.

Annual Salary: Just under 44% of downtown employees that responded had an annual salary of less than \$50,000. Employees that made over \$100,000 amounted to just over 15% of respondents.

Education: 58% of downtown employees received a college education, with 35% indicating they received an undergraduate education and 23% reported having a graduate degree.

Own vs. Rent: Just under 83% of employees reported owning a home, compared to 16% that reported renting.

County Area: 32% of downtown employees indicated they live on the Westside, compared to 20% that live in Central and 23% that live on the Eastside. While most employees indicated they did not live in the downtown area (96%), a third of respondents (34%) indicated they would consider living in downtown if suitable housing were made available, while another 16% were simply unsure at this time.

Commuting and Working Hours: Most downtown employees (89%) drive alone to work and have mostly daytime working hours (99%). A majority of downtown employees (58%) reported that they did not visit downtown after their regular working hours. In comparison, 42% of employees did visit downtown outside of their working hours.

Downtown events and promotions: 40% of downtown employees who visited downtown reported that they attended music and entertainment events, compared to arts and cultural events (19%), dining and drinking (18%), and shopping (14%). Downtown

¹ For statistical purposes, the sampling was weighted to compensate for the overrepresentation of women in the sampling size.

employees become aware of incoming events and activities in downtown in two primary methods: newspapers (29%) followed by word of mouth/friends (19%).

Additional observations

Most employees that visited downtown outside of their working hours reported they were under the age of 35 years old (53%). For downtown visits during the weekends, 48% of employees were under the age of 35 years old. In comparison, 63% of employees that did not visit downtown on the weekends identified themselves as 35 years or older.

Over 58% of employees that visited downtown after working hours and on the weekends have annual salaries over \$40,000 and up to \$80,000 or more. In general, more than half of employees that visited downtown after working hours identified that they lived in Central (64%), including half of employees that visited downtown on the weekends, which half of these respondents indicated that they lived in Central (54%).

El Paso Households

Ethnicity: A large majority of households surveyed were Hispanic (89%), compared to White, Non-Hispanic households (15%), and all other ethnicities represented at 2%.

Gender: 53% of household respondents were female and 47% of household respondents were male.

Age: Just under 22% of household respondents were between the ages of 55-64 years old, followed by household respondents who were between the ages of 45-54 years old (18%), 35-44 years old (18%), and 65-74 years old (15%).

Annual Salary: A third of households indicated they made between \$10,000 or less, but no more than \$40,000 a year (34%). However, another third of respondents refused to answer or did not know (34%).

Education: Half of households reported having a high school education or less (53%), compared to a fourth of households reporting a college and/or a graduate education (26%).

Own vs. Rent: 72% of households reported owning a home, compared to 23% that rented.

County Area: Households surveyed were evenly represented throughout El Paso County. In addition, households indicated they did not live in downtown (94%), and a majority would not consider living in downtown if suitable housing were available (58%). However, 41% would consider living in downtown if suitable downtown housing were available.

Commuting and Downtown visits: Most households (74%) drive alone when they visited downtown and mostly during daytime work hours (83%). A majority of households reported that they visit downtown during the weekdays (62%), compared to the weekends (38%). In addition, 34% of households indicated they visited downtown on a monthly basis, compared to another 22% that visited weekly and another 26% that made yearly trips to downtown. A large majority did not believe Juarez-related violence has an impact in attending downtown events, in particular when they chose to stay in the downtown area after regular working hours (73%).

Downtown events and promotions: Just under half of all households reported visiting downtown because of shopping opportunities (48%), followed by services (15%), arts and cultural events (10%), and music and entertainment events (8%). Households indicated two primary ways households become aware of incoming events and activities in downtown: television (39%) and newspapers (35%).

Additional observations

Just under 40% of all households surveyed reported that they visited downtown on a weekly and/or monthly basis were also under the age of 35 years old (35% weekly and 38% monthly, respectively.) For weekday or weekend visits to downtown, households led by family members who were 35 years old or more tend to visit downtown on the weekends (64%). For households under 35 years old, the tendency to visit downtown on the weekdays and/or weekends are fairly balanced and no preference either way (52% on weekdays and 48% on weekends, respectively.)

More than 60% of households that visited downtown on weekdays were evenly represented from all parts of the city. In contrast, there was a low weekend turnout (30%) of these same households that indicated they visit downtown on the weekends with again an equal representation of all regions of the city. Income levels, specifically what households make on a yearly basis have relatively no impact on the foot traffic to downtown. The same is true of where households reside, meaning distance from the downtown area (e.g. living on the Westside or Eastside) have relatively no impact on visiting downtown.

Final Observations

The survey-census underscores that Downtown El Paso remains supported by a strong employment base that has been doing business in downtown for generations. The earning power and potential to engage downtown employees and households throughout El Paso County have been underutilized and underserved. To grow Downtown El Paso where El Pasoans want to *live, work, play, and connect* in the city's center of cultural and civic life, there has to be sustainable change. This invaluable information will now be the catalyst for the Downtown Management District and the City of El Paso to amplify the voice and image of downtown while providing a clear message and directive for the El Paso community to participate and enjoy.

This is about changing the hearts and minds of El Pasoans where the entire community feels pride and responsibility to rebuild downtown. To move downtown to the next step of financial growth and cultural activity, this demographic data is the starting point to begin to understand the strengths and the challenges that lay ahead for downtown revitalization.

This data is truly an opportunity to look at downtown differently as a *go to place destination* that has a cadre of quality amenities -- from potential housing and residential living to a superb dining and shopping experience. This cannot be understated: this is the first time in the history of Downtown El Paso that this level of demographic analysis has been conducted. All demographic information in this survey-census will provide invaluable

benchmarks for the DMD to initiate targeted marketing campaigns with tailored messages and outreach programs.

Downtown El Paso is alive with new developments and should be seen as economically viable. Downtown El Paso is on track to be a newfound hub for economic activity and job growth. It is also edging to become the prime destination for entertainment, sports events, cultural arts, nightlife, and special events. All signs point to sustained growth and viability now and into the near-term future.