

**DOWNTOWN
MANAGEMENT DISTRICT**
E L P A S O

**Annual Survey Results
2022**



Survey Structure & Distribution

- Unscientific survey conducted during the month of July
- Approx. 15 traditional questions, plus recovery status
- English & Spanish
- Online (Surveymonkey.com)
- Topics
 - Demographics – Property Owners, Business Owners, Employees, Residents, Visitors
 - Recovery Status
 - Current condition of Downtown El Paso
 - Future Needs or Priorities
 - Performance of the DMD
- Distribution
 - Local Media
 - Social Media
 - Direct Emails
 - Direct Mail to Props/Businesses
 - Insider Newsletter
- Incentive - \$100 Gift Certificate



Respondents

Year	English	Spanish	Total
2015	632	15	647
2016	467	201	668
2017	1,091	32	1,123
2018	662	23	694
2019	854	22	876
2020	595	30	625
2021	1,004	41	1,045
2022	1,168	38	1,206



Respondents

Breakdown	2015	2016	2017	2018	2019	2020	2021	2022
Prop Owner /Manager	2%	3%	3%	2%	5%	5%	9%	4% (46)
Business Owner	5%	5%	4%	3%	5%	6%	18%	6% (69)
Employee	37%	21%	34%	15%	32%	39%	27%	19% (232)
Resident	3%	4%	4%	5%	5%	5%	10%	5% (61)
Visitor	53%	67%	55%	75%	53%	45%	36%	66% (798)



Current State of Downtown

- CLEAN: 71% Agree 29% Disagree
- SAFE: 83% Agree 17% Disagree
- WELCOMING: 79% Agree 21% Disagree
- IMPROVING: 84% Agree 16% Disagree
- FAMILY FRIENDLY: 80% Agree 20% Disagree
- FUN: 77% Agree 23% Disagree



Future of Downtown

Most Important Elements (In order of priority)

1. Safety/Security (LY - #1)
2. Cleanliness (LY - #2)
3. Parking (LY - #5)
4. Building Restoration & New Construction (LY - #6)
5. Events (LY - #3)
6. Family Friendly Atmosphere/Businesses (LY - #4)
7. Diverse Retail/Shopping Options (LY - #7)
8. Public Transportation (LY - #10)
9. Code Enforcement (LY - #9)
10. Nightlife (LY - #8)
11. Residential Options (LY - #11)



DMD Performance

- Overall 67% Familiar with DMD (decrease of 14%)
 - 95% (-4%) of Property Owners and 93% (+4%) of Business Owners
 - Grade the DMD
 - 73% gave DMD an “A” or “B” (down 4%)
 - 20% gave DMD a “C” (up 3%)
 - 6% gave DMD a “D” or “F” (up 1%)
 - Favored Expansion* of these DMD Services:
 - Advocacy (54%)
 - Grants (56%)
- * received 50%+ in favor of expansion



Overall Observations

- Highest level of participation.
- Events, Bars & Restaurants drive visitor traffic.
- More favorable long-term outlook than current.
- Specific conditions of Downtown remain strong.
- Attitudes are stronger – levels of importance increased. Desire for increased advocacy & grants.
- DMD grade held somewhat steady.



Recovery Status

- 78% of Property Owners indicated that their properties are at 75% or great occupancy (LY - 43%).
- 40% of Business Owners indicated their Downtown workforce is at 100% or more from the pre-Covid (LY-21%). 25% indicate workforce is 0-24% of what it was.
- 60% of Employees are back to work entirely Downtown (LY-38%), with an additional 40% working a hybrid schedule (LY-57%). <1% only remote.
- Only 1.6% of Visitors have not returned to the Downtown in the last 12 months. 85% have visited at least 4 times.



INSIDER & Gift Certificate

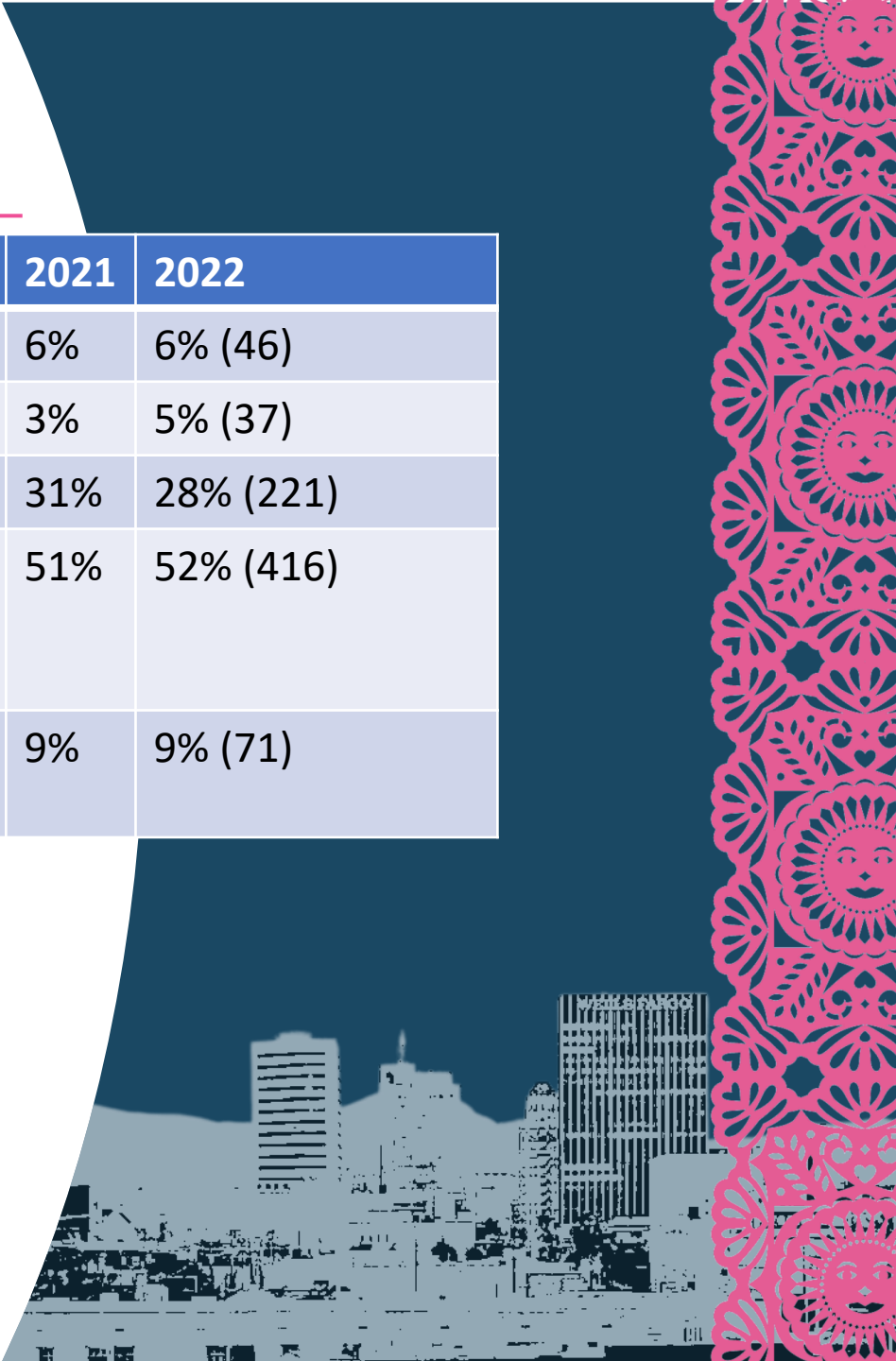
- 338 requested to be added to our INSIDER Newsletter distribution list (107 Net Gain)
- 135 people indicated they would like to volunteer with the DMD
- 769 people registered for a chance to win a \$100 Gift Certificate
 - WINNER: Rene Varela

Our Downtown survey winner, Rene Varela, chose a \$100 gift card to Taft Diaz!



Visitors' Primary Reason to Visit

Breakdown	2015	2016	2017	2018	2019	2020	2021	2022
Shopping	7%	32%	8%	8%	6%	8%	6%	6% (46)
Business	8%	4%	10%	6%	7%	9%	3%	5% (37)
Restaurants, Bars, Nightclubs	19%	20%	17%	17%	22%	23%	31%	28% (221)
Events (i.e. Al Fresco Fridays, Art & Farmers Market, Chihuahuas Baseball)	54%	34%	55%	57%	51%	45%	51%	52% (416)
Attractions (i.e. Museums, Digital Wall)	12%	10%	10%	12%	14%	15%	9%	9% (71)



Type of Events Attracting Visitors

Breakdown	2017	2018	2019	2020	2021	2022
Sporting Events	38%	22%	17%	18%	24%	18%
Street Festivals	26%	25%	21%	24%	21%	20%
Art Crawls (Last Thursdays)	5%	3%	5%	3%	2%	2%
Art & Farmers Market	12%	12%	11%	15%	15%	10%
Bar Crawls (Barstool Open)	-	-	-	-	3%	2%
Restaurant Crawls (Tasting Tour)	-	-	-	-	5%	7%
Museum Events	2%	3%	3%	4%	4%	4%
Theater Events	-	27%	31%	25%	21%	29%
Other	17%	8%	12%	11%	5%	8%



Direction of Downtown

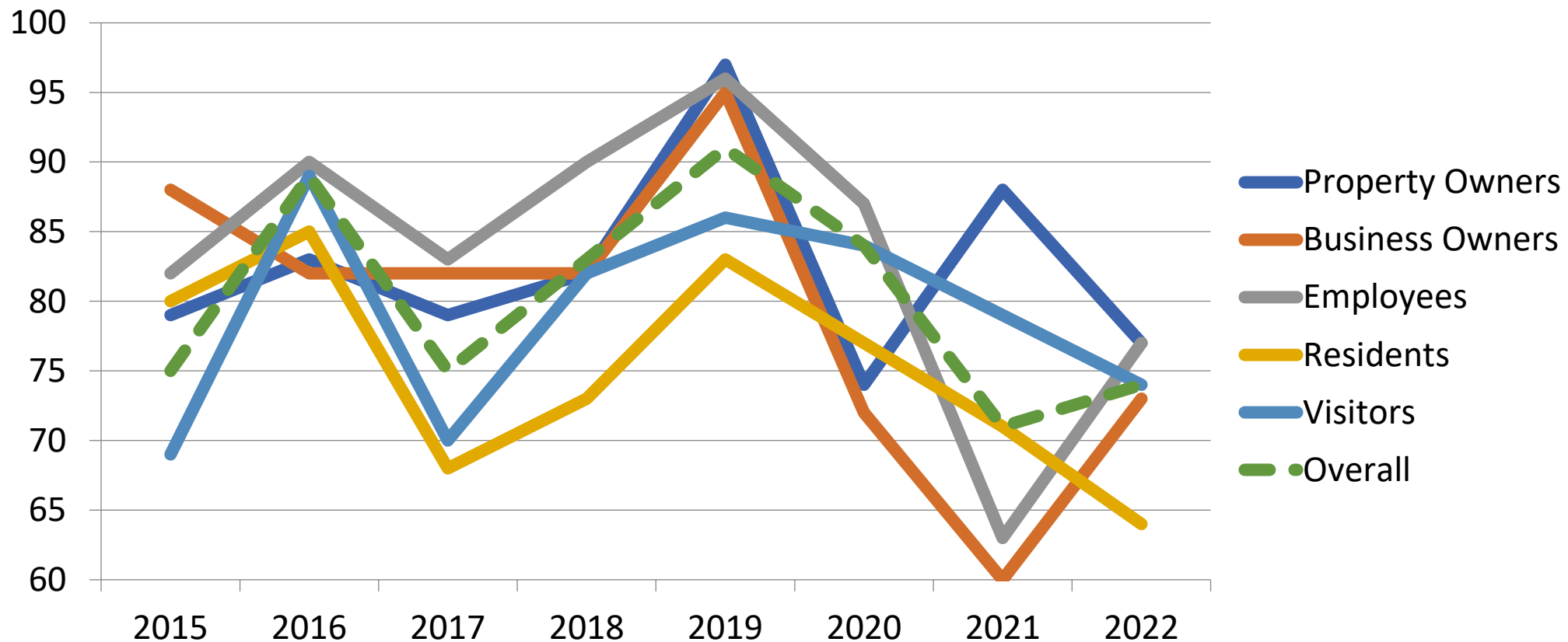
In terms of Downtown redevelopment, opportunity and excitement, in which direction do you see Downtown El Paso heading?

Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Progressing	75%	89%	75%	83%	91%	84%	71%	74%
No Progress	12%	4%	8%	6%	3%	5%	17%	11%
Declining	6%	2%	9%	6%	2%	5%	9%	8%
Other	7%	5%	7%	5%	4%	6%	3%	7%

Direction of Downtown

In terms of Downtown redevelopment, opportunity and excitement, in which direction do you see Downtown El Paso heading?

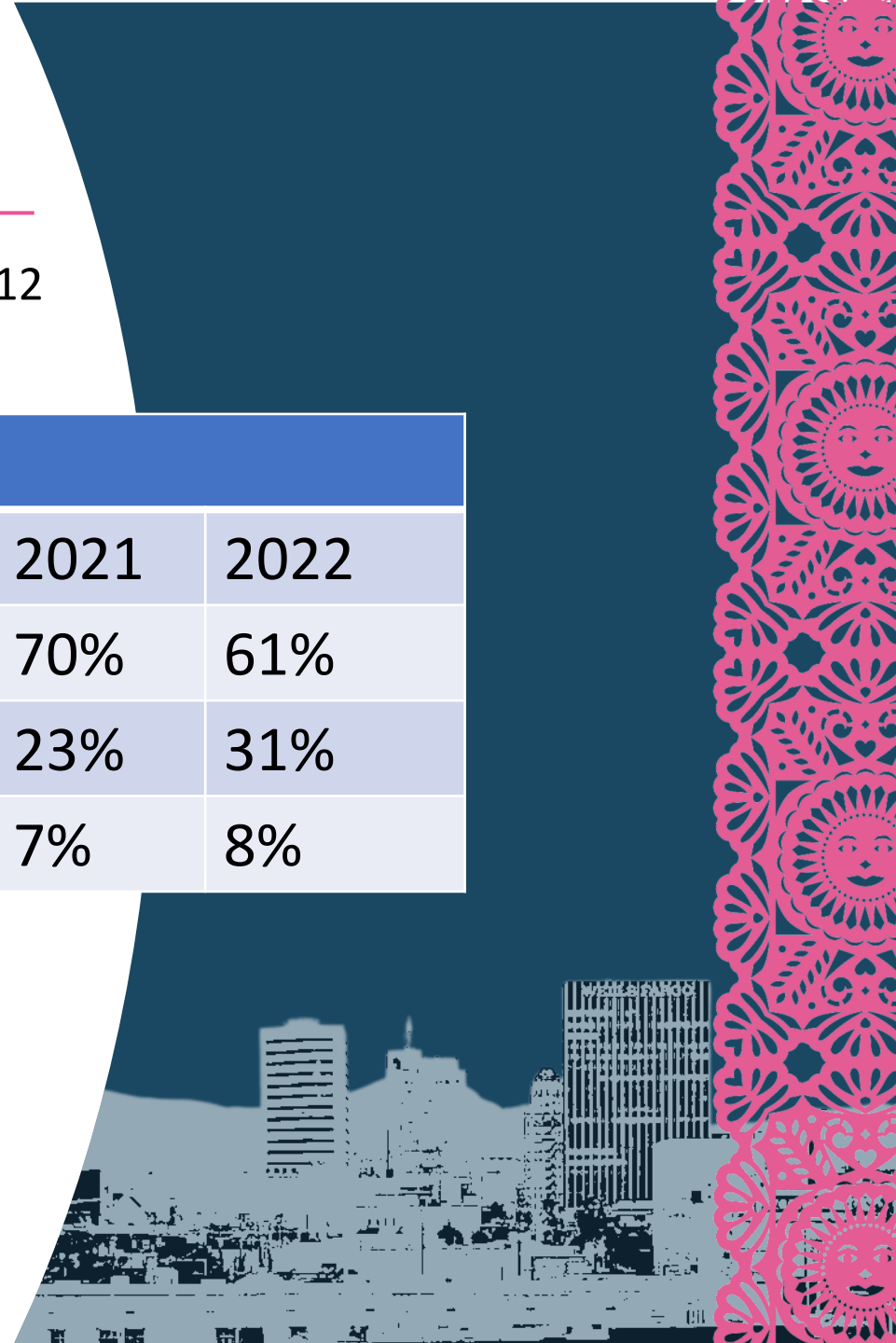
Chart: % of people who see downtown progressing.



Perceptions

How has your perception of Downtown El Paso changed over the last 12 months?

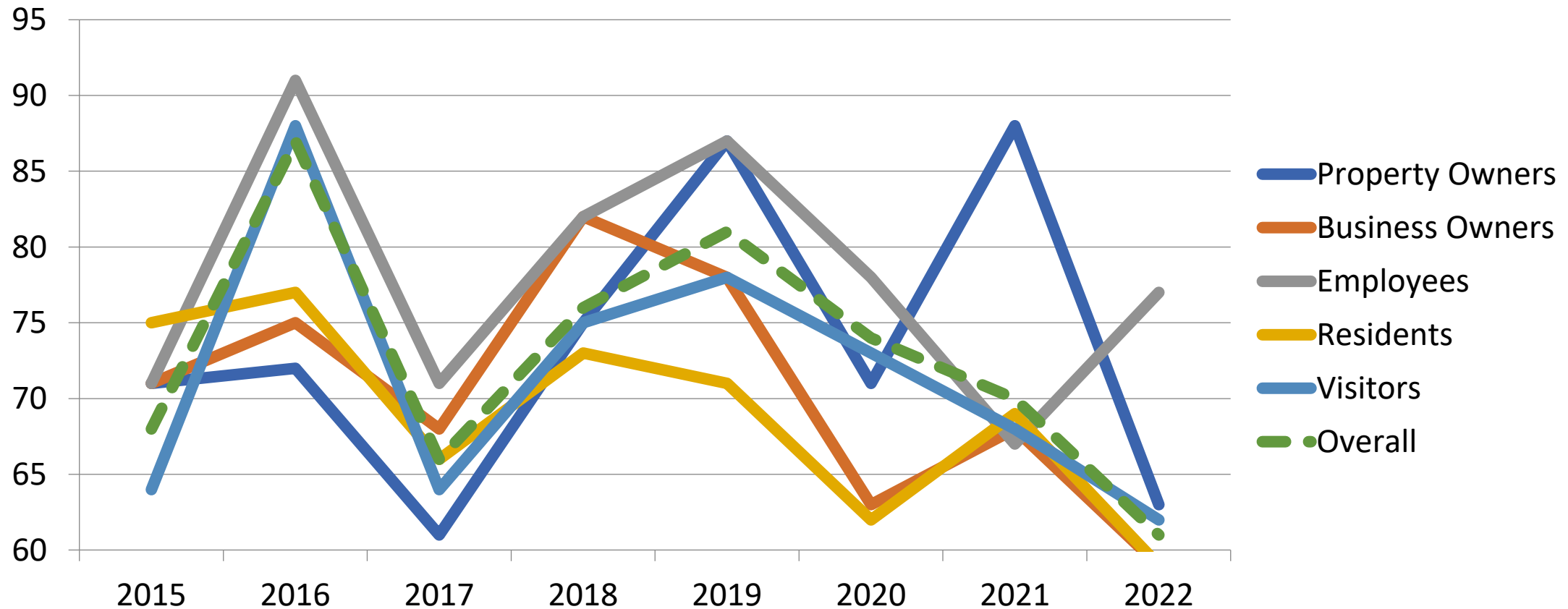
Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Improved	68%	87%	66%	76%	81%	74%	70%	61%
No Change	22%	9%	19%	18%	17%	21%	23%	31%
Worsened	10%	4%	14%	6%	3%	5%	7%	8%



Perceptions

How has your perception of Downtown El Paso changed over the last 12 months?

Chart: % of people responding positively.



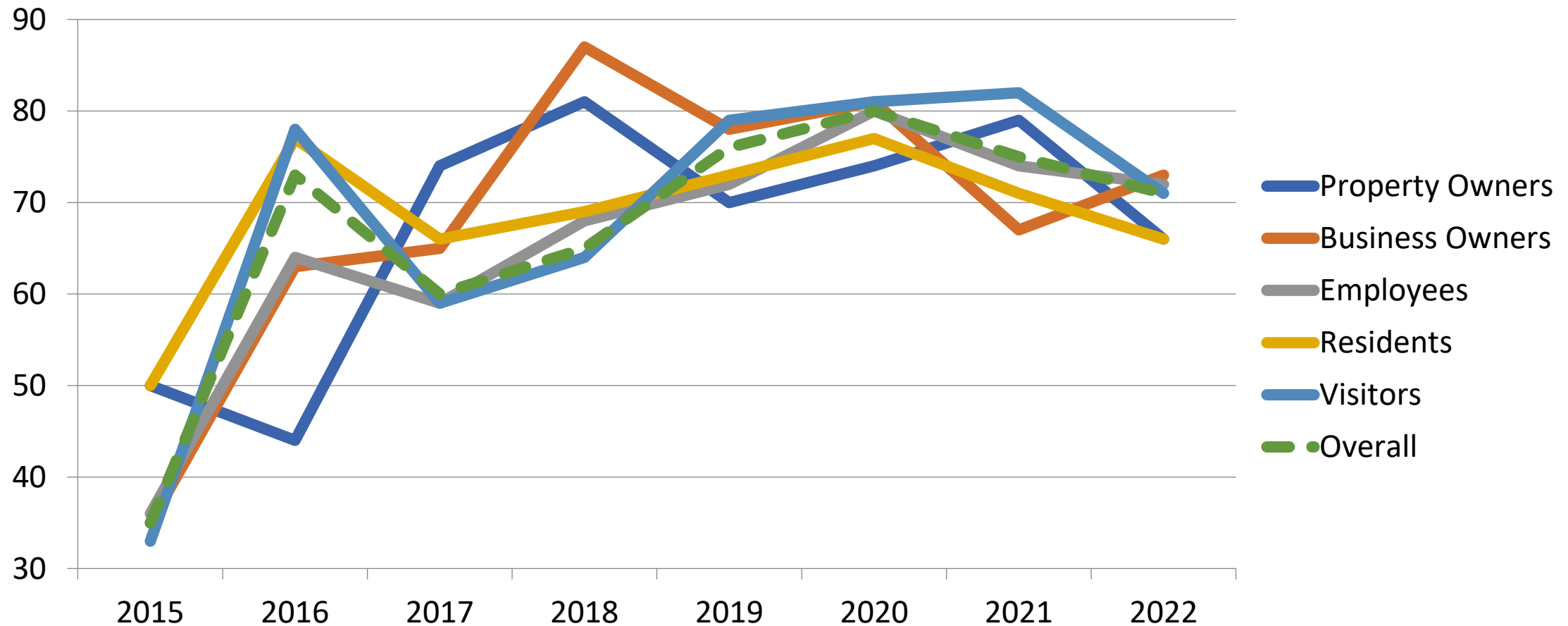
Downtown El Paso is CLEAN

Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Agree	35%	73%	60%	66%	76%	80%	75%	71%
Neutral	29%	NA	NA	NA	NA	NA	NA	NA
Disagree	36%	27%	40%	34%	24%	20%	25%	29%



Downtown El Paso is CLEAN

% of Respondents in Agreement with the statement.



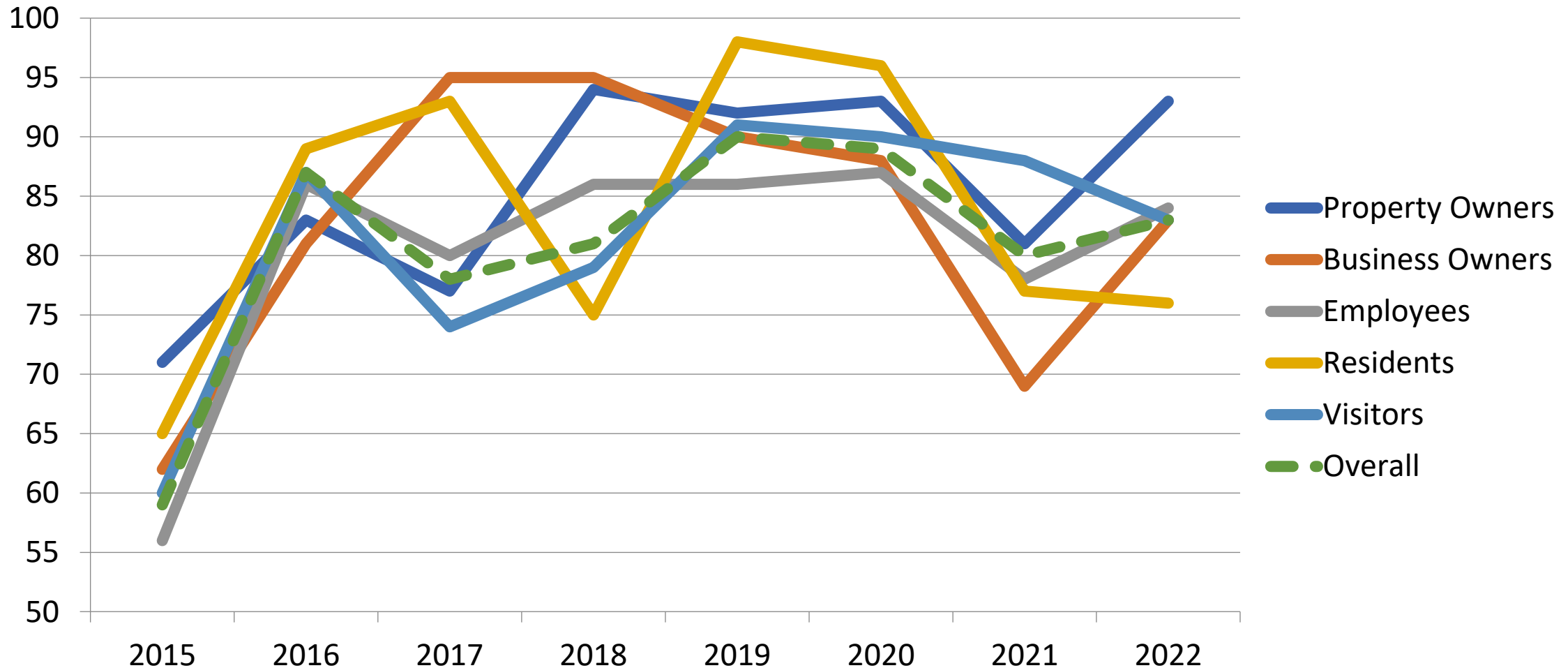
Downtown El Paso is SAFE

Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Agree	59%	87%	78%	81%	90%	89%	80%	83%
Neutral	24%	NA	NA	NA	NA	NA	NA	NA
Disagree	17%	14%	22%	19%	10%	11%	20%	17%



Downtown El Paso is SAFE

% of Respondents in Agreement with the statement.



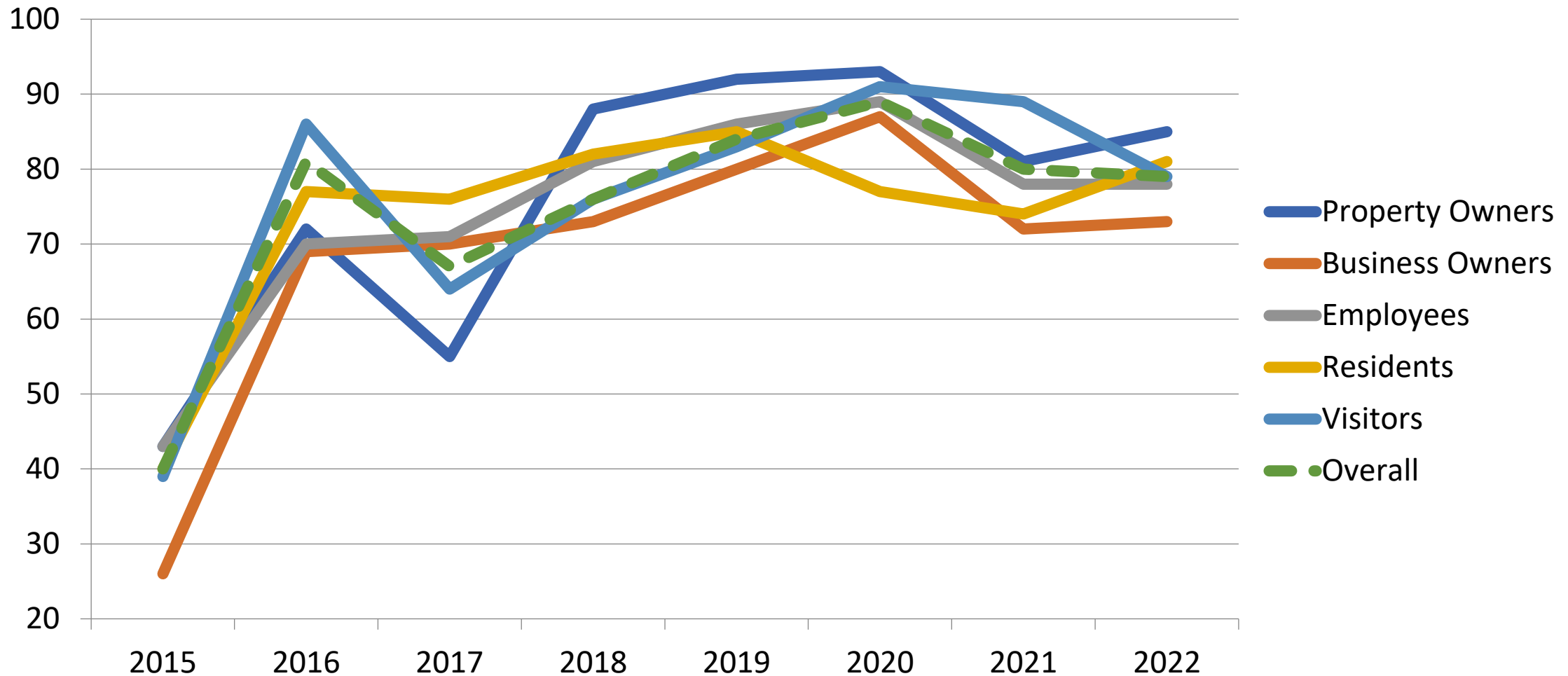
Downtown El Paso is WELCOMING

Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Agree	40%	81%	67%	77%	84%	89%	80%	79%
Neutral	34%	NA	NA	NA	NA	NA	NA	NA
Disagree	26%	19%	33%	23%	16%	11%	20%	21%



Downtown El Paso is WELCOMING

% of Respondents in Agreement with the statement.



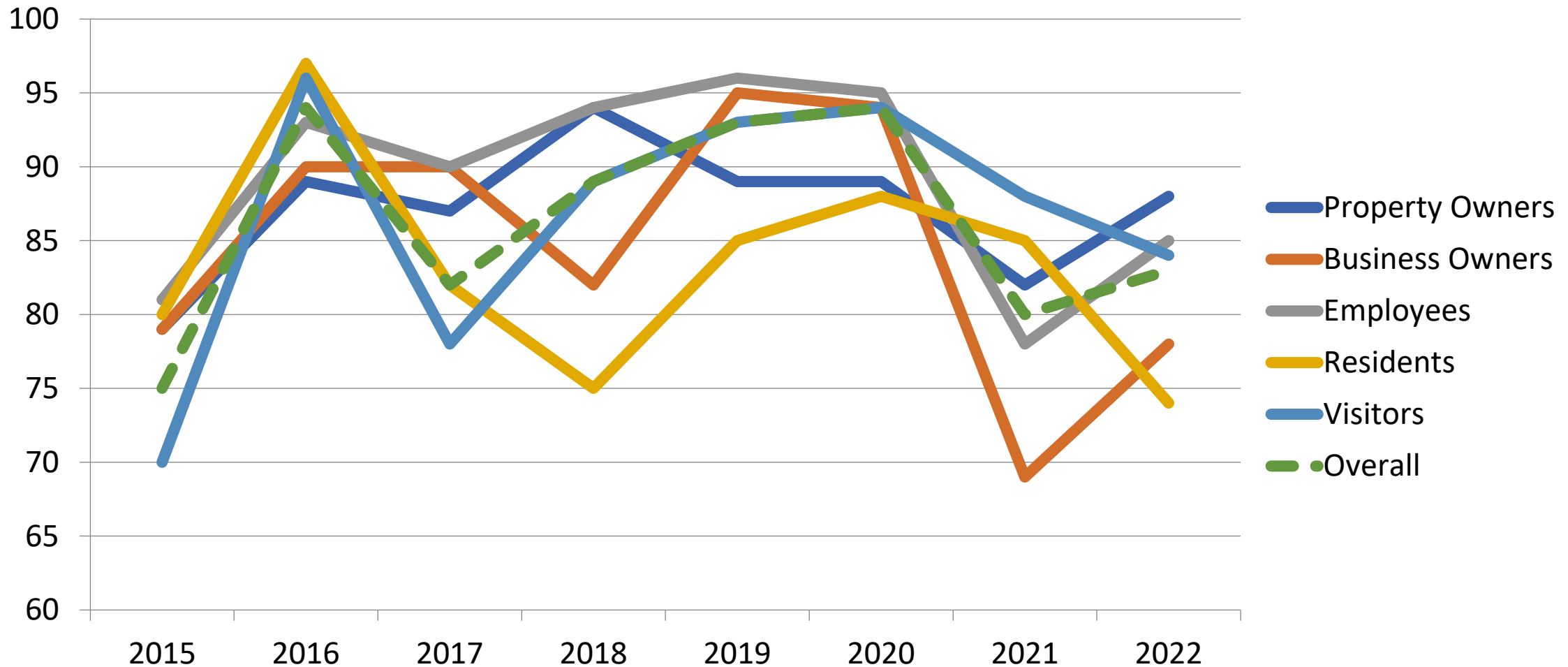
Downtown El Paso is IMPROVING

Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Agree	75%	94%	83%	88%	93%	94%	80%	83%
Neutral	14%	NA	NA	NA	NA	NA	NA	NA
Disagree	11%	6%	17%	12%	7%	6%	20%	17%



Downtown El Paso is IMPROVING

% of Respondents in Agreement with the statement.



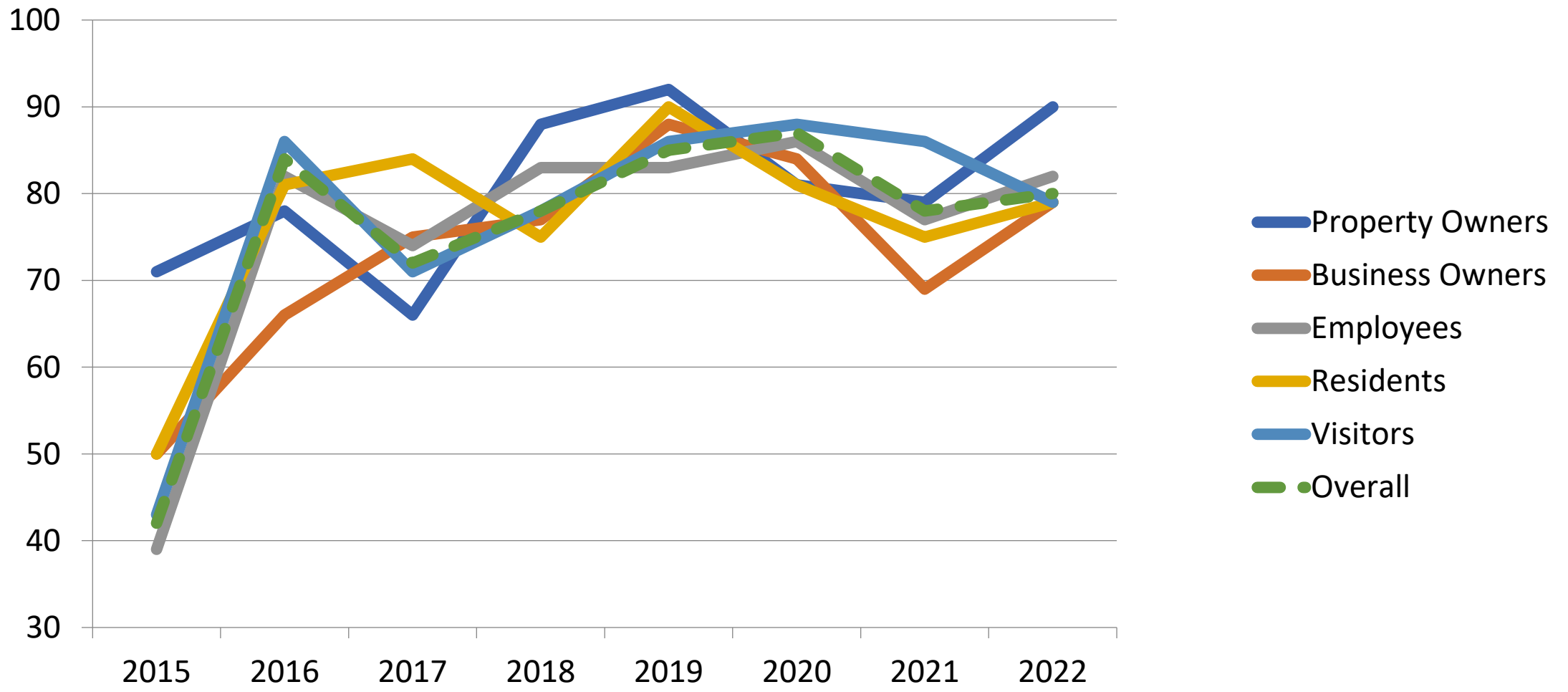
Downtown El Paso is FAMILY FRIENDLY

Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Agree	42%	84%	72%	79%	85%	87%	78%	80%
Neutral	31%	NA	NA	NA	NA	NA	NA	NA
Disagree	26%	17%	28%	21%	15%	13%	22%	20%



Downtown El Paso is FAMILY FRIENDLY

% of Respondents in Agreement with the statement.



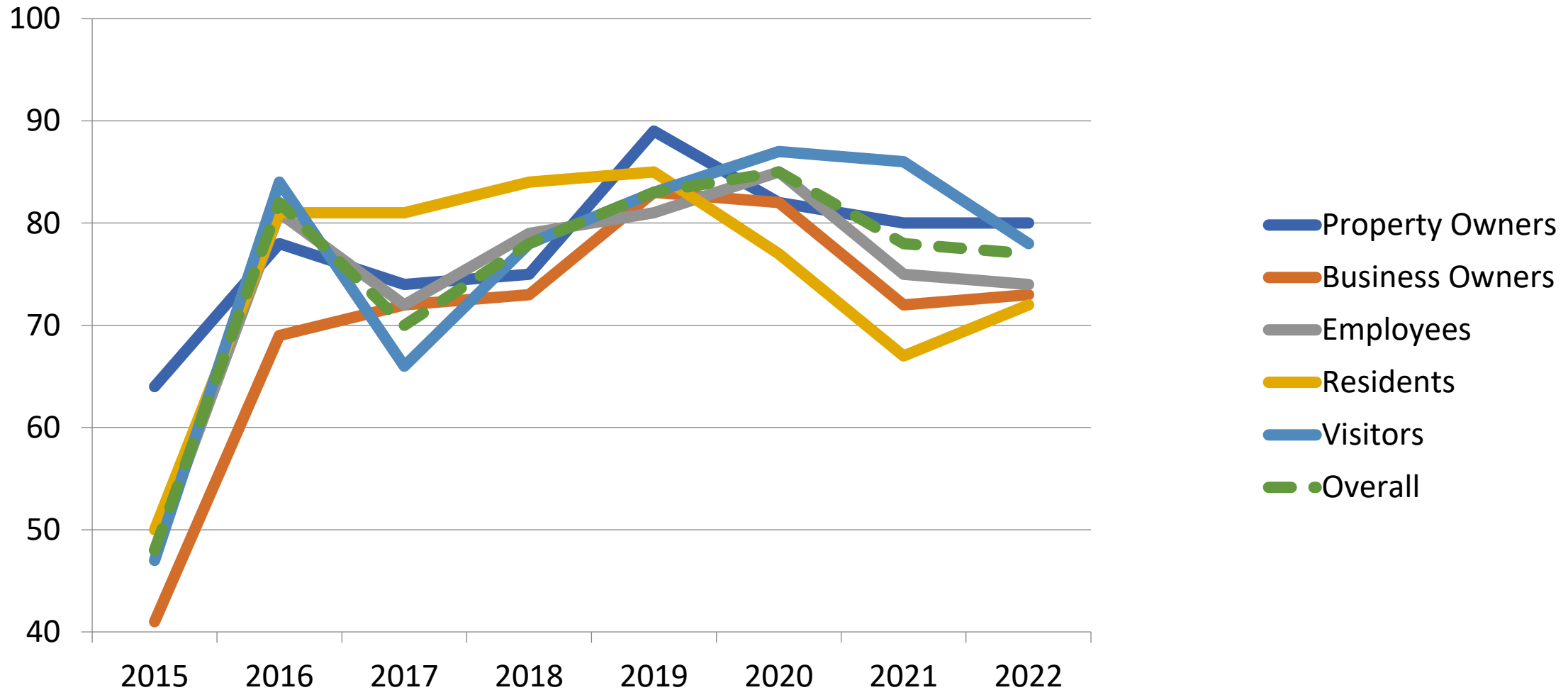
Downtown El Paso is FUN

Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Agree	48%	82%	70%	78%	83%	85%	78%	77%
Neutral	31%	NA	NA	NA	NA	NA	NA	NA
Disagree	21%	19%	30%	22%	17%	15%	22%	23%



Downtown El Paso is FUN

% of Respondents in Agreement with the statement.



Important Elements

Respondents indicated that the following elements are “Very Important” to the ongoing redevelopment of Downtown El Paso

Breakdown	Overall								
	2015	2016	2017	2018	2019	2020	2021	2022	Yrs. to Yr. Change
Diverse Retail & Shopping Options	61%	64%	54%	59%	60%	58%	37%	58%	+21%
Parking	62%	72%	71%	76%	74%	68%	41%	72%	+31%
Safety/Security	79%	85%	84%	86%	84%	85%	48%	85%	+37%
Public Transportation Options	49%	59%	47%	52%	50%	43%	29%	45%	+16%
Nightlife	44%	46%	37%	39%	43%	41%	31%	41%	+10%
Family Friendly	61%	68%	63%	69%	64%	67%	42%	65%	+23%
Cleanliness	74%	78%	79%	82%	83%	82%	48%	79%	+31%
Events	60%	61%	55%	64%	64%	63%	43%	67%	+24%
Residential Options	38%	37%	33%	30%	35%	33%	21%	33%	+12%
Building Restoration & New Construction	70%	66%	64%	70%	67%	63%	39%	67%	+28%
Code Enforcement	NA	NA	NA	47%	45%	47%	29%	44%	+15%



Top 3 Elements

Respondents indicated the three most important elements for the redevelopment of Downtown El Paso

	Overall
1.	Safety/Security
2.	Parking
3.	Events

	2022	2021	2020	2019	2018	2017
#1	Safety/Security	Diverse Retail/Shopping Options	Safety/Security	Parking	Parking	Safety/Security
#2	Parking	Safety/Security	Diverse Retail/Shopping Options	Safety/Security	Safety/Security	Family Friendly Atmosphere & Businesses
#3	Events	Nightlife	Family Friendly Atmosphere & Businesses	Family Friendly Atmosphere & Businesses	Family Friendly Atmosphere & Businesses	Parking

Top 3 Elements

Respondents indicated the three most important elements for the redevelopment of Downtown El Paso

	Property Owner	Business Owner	Employee	Resident	Visitor	Overall
1.	Diverse Retail/Shopping Options, & Residential	Parking	Diverse Retail/Shopping Options	Parking	Safety/Security	Safety/Security
2.	Safety/Security, & Building Restoration	Family Friendly Atmosphere & Businesses	Family Friendly Atmosphere & Businesses	Safety/Security	Events, & Parking	Parking
3.	Family Friendly Atmosphere & Businesses, & Events	Building Restoration	Building Restoration	Events	Family Friendly Atmosphere & Businesses	Events



DMD Familiarity & Grade

	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Familiar with DMD	68%	59%	66%	60%	72%	73%	81%	67%
Not Familiar	32%	41%	34%	40%	28%	27%	19%	33%



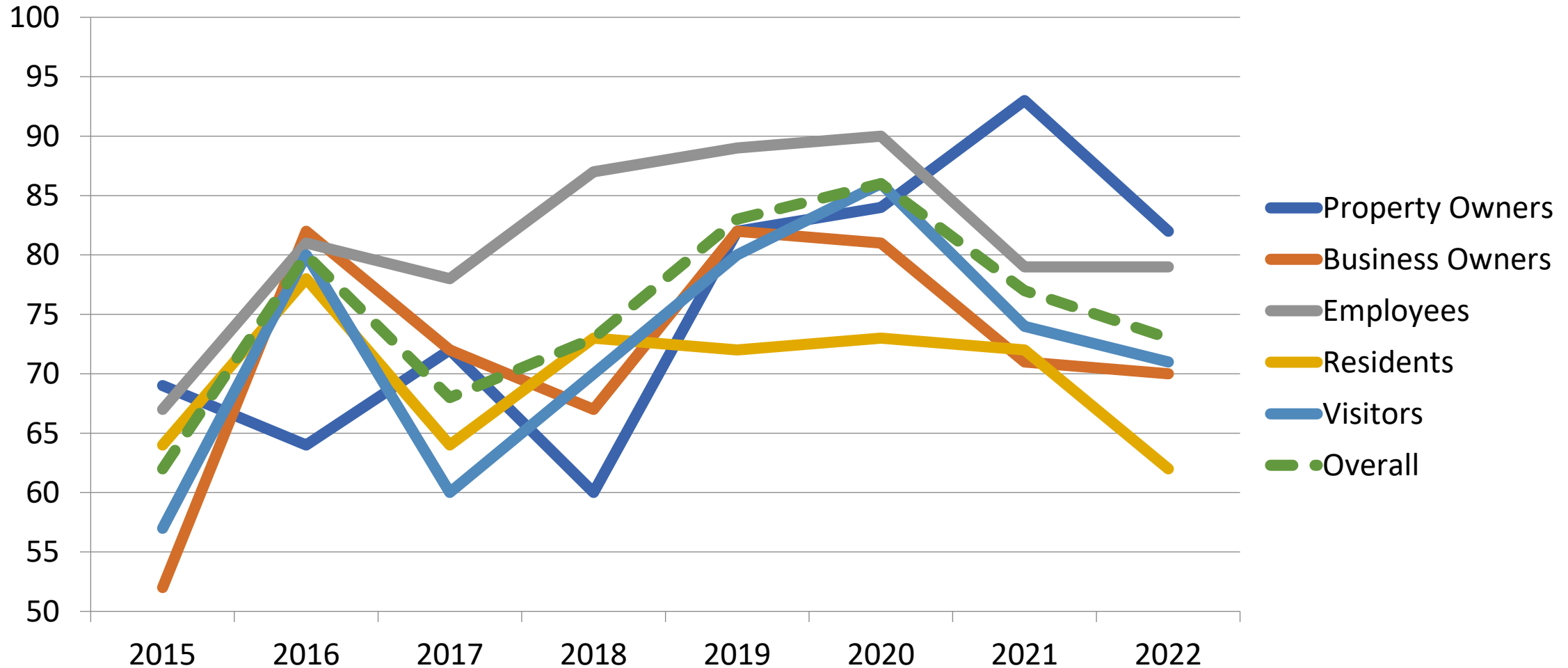
DMD Familiarity & Grade

	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
“A” – Great Job	12%	22%	18%	20%	24%	33%	30%	23%
“B” – Doing Well, Room to Improve	50%	58%	50%	53%	59%	53%	46%	50%
“C” – Average, More Can Be Done	24%	16%	22%	19%	12%	8%	17%	20%
“D” – Poor Performance	5%	0%	5%	2%	1%	1%	4%	3%
“F” – Failing	5%	1%	4%	2%	1%	1%	2%	2%
Other	4%	3%	2%	4%	2%	4%	1%	2%



DMD Grade

% of Respondents giving DMD a grade of "A" or "B".



DMD Service Levels

Respondents indicated whether DMD services need to be enhanced.

Breakdown	Overall							
	2015	2016	2017	2018	2019	2020	2021	2022
Sanitation Services	50%	48%	45%	45%	39%	35%	27%	43%
Pedestrian Amenities	52%	42%	39%	38%	34%	29%	26%	38%
Advocacy & Planning	51%	50%	62%	60%	56%	48%	34%	54%
Downtown Services	39%	42%	39%	37%	36%	32%	26%	42%
Marketing & Promotions	48%	51%	48%	54%	44%	41%	30%	49%
Economic Development & Façade Grants	NA	54%	57%	56%	50%	48%	33%	56%
Events	NA	NA	50%	46%	38%	37%	32%	44%