

IDA Urban District Consumer Survey

Spring/Summer 2021
Overall Results



RRC
ASSOCIATES

About the Research

- Goal is to provide resident feedback for downtown organizations, city leaders and businesses to plan operations and messaging for the summer season
- 4,544 surveys completed from mid April through last week
- 23 districts across the U.S. generating results



Demographics & Geography

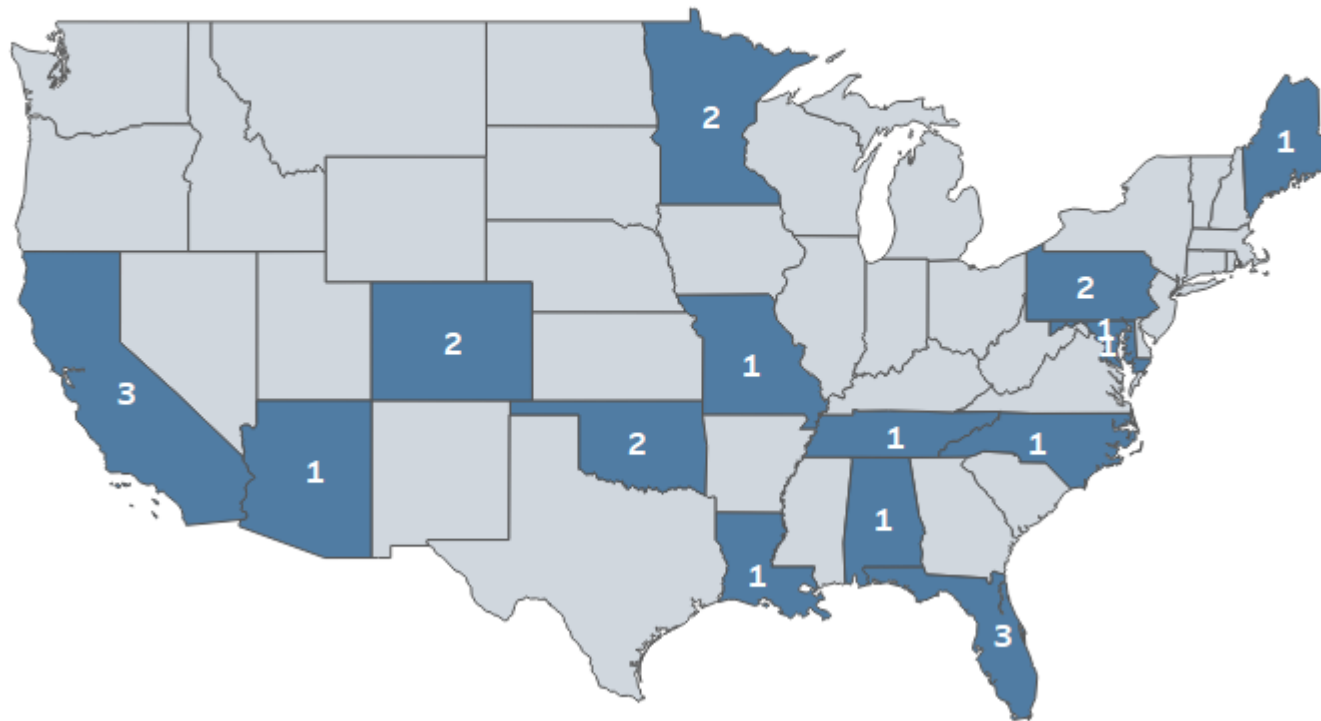


Participating Districts

23 Districts Across the U.S.

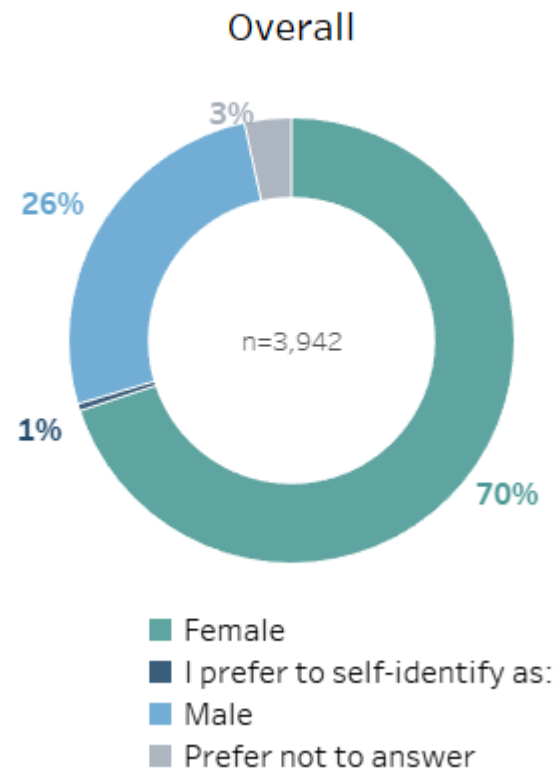
Number of Participating Districts in the Study by State

United States

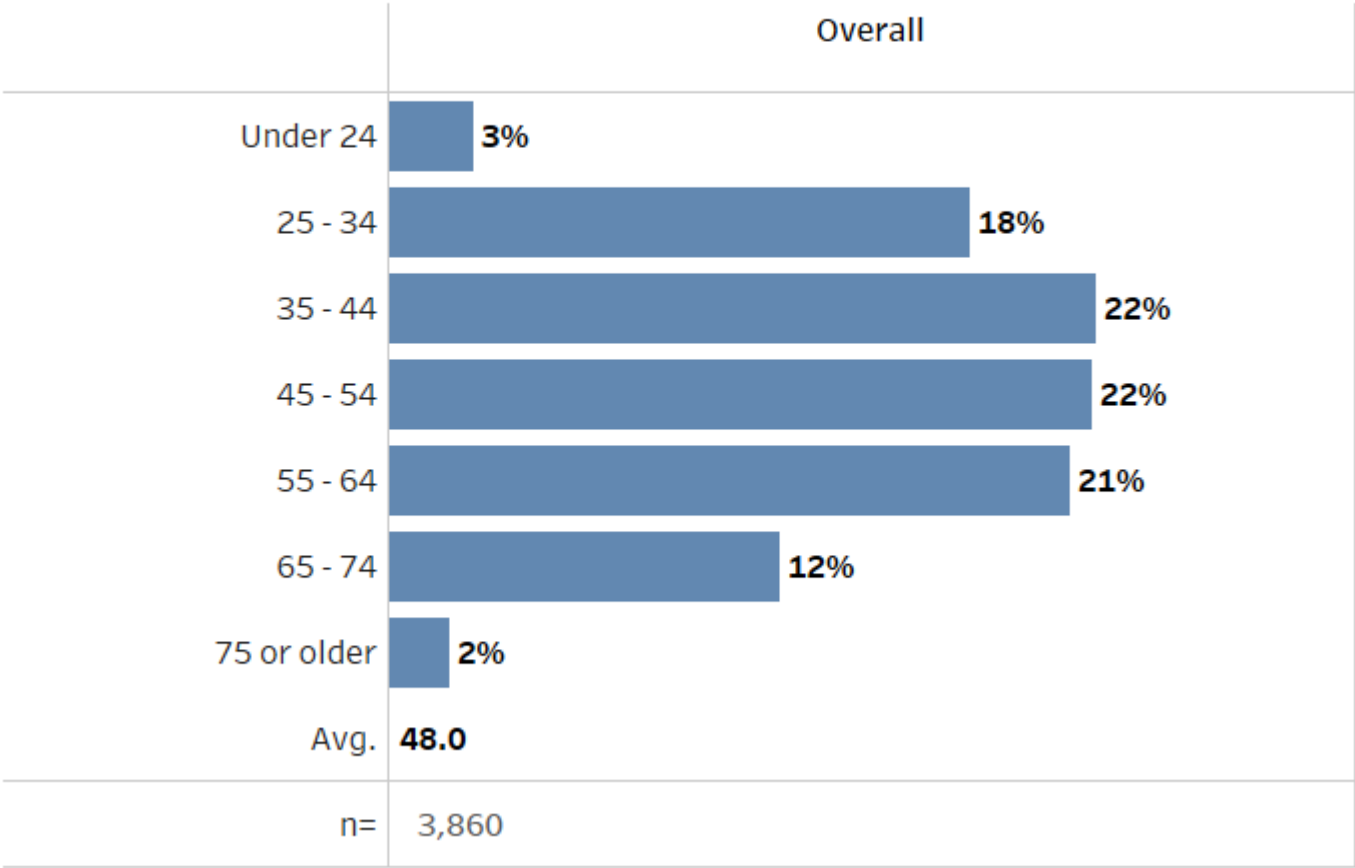


Gender and Age

Respondent Gender



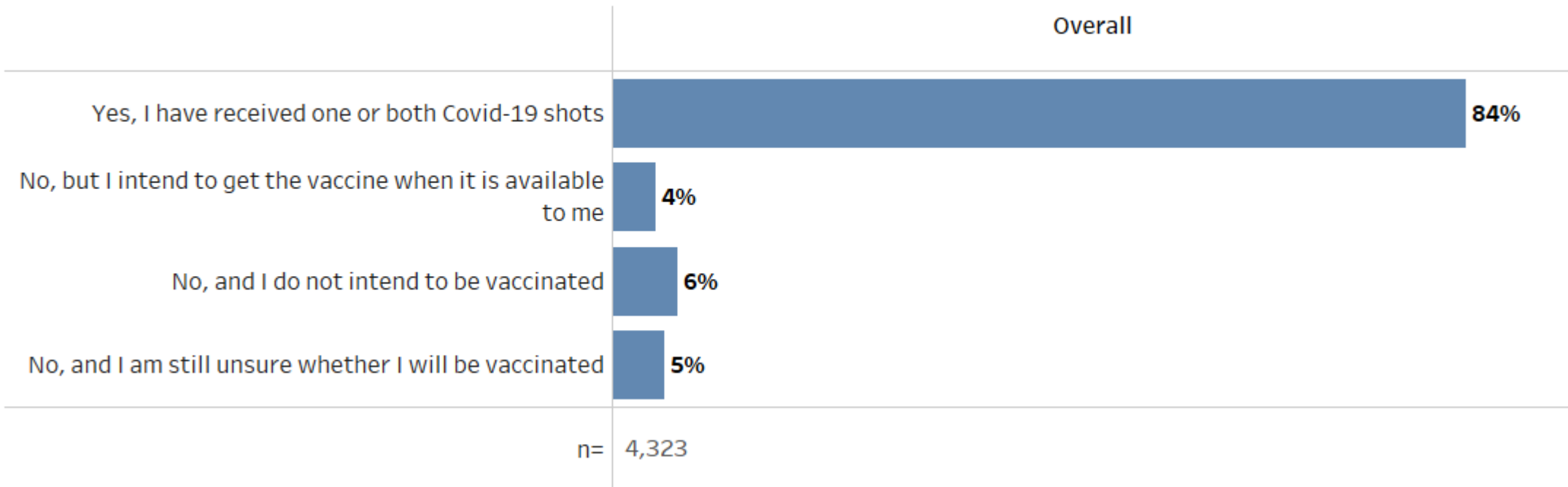
Age of respondent



Vaccinations

84% have received one or both Covid-19 vaccination shots

Have you received a Covid-19 vaccination?



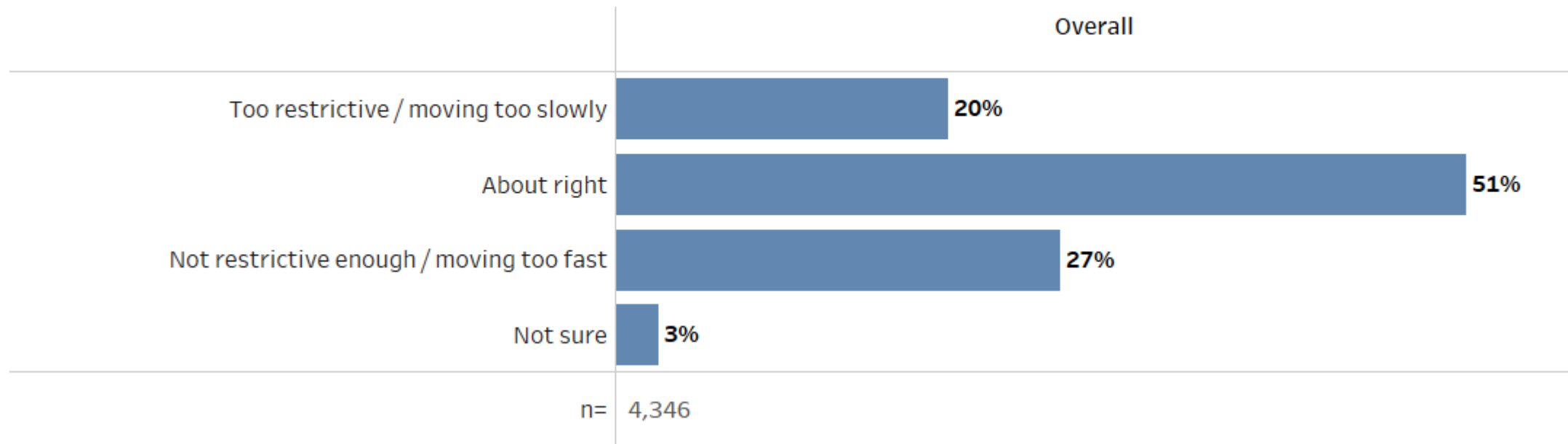


Local Restrictions & Policies

Thoughts on Covid Policies

About half of respondents say the pace of easing restrictions is going “About right”

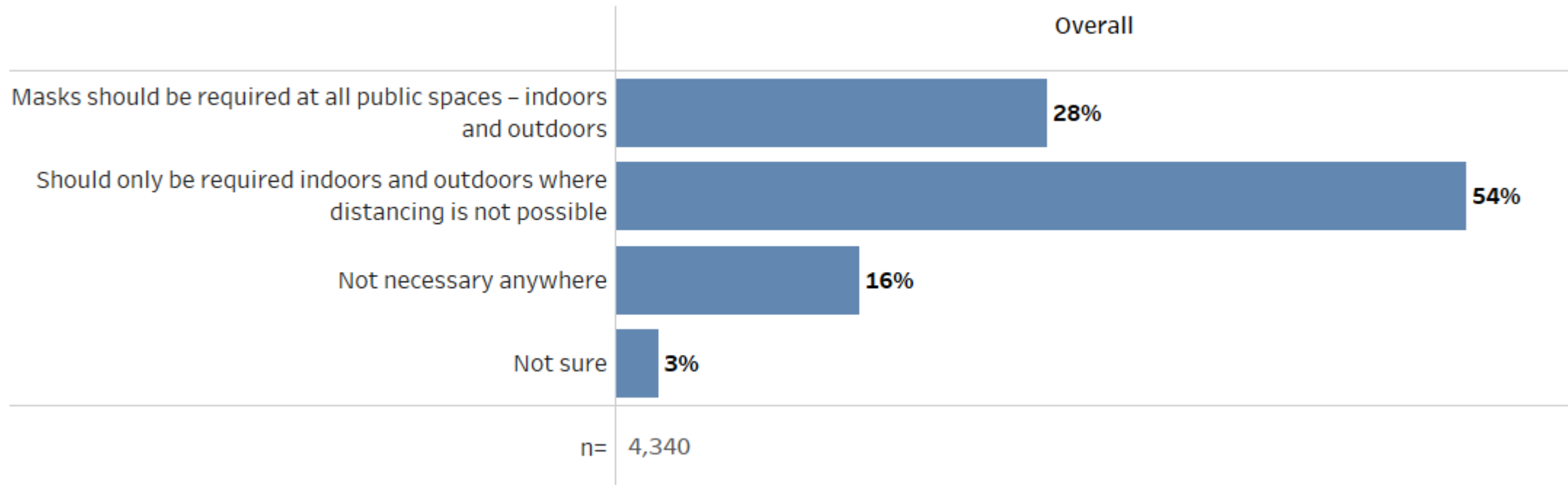
Regarding local government policies, do you feel the current pace of easing restrictions on indoor dining, movies theaters, special events, etc. in your community is:



Thoughts on Requiring Masks

82% favor requiring masks but more than half say they are only needed indoors and outdoors where distance not possible

How do you feel about public mask requirements in your area as we move into the summer season?





Getting Back to “Normal”

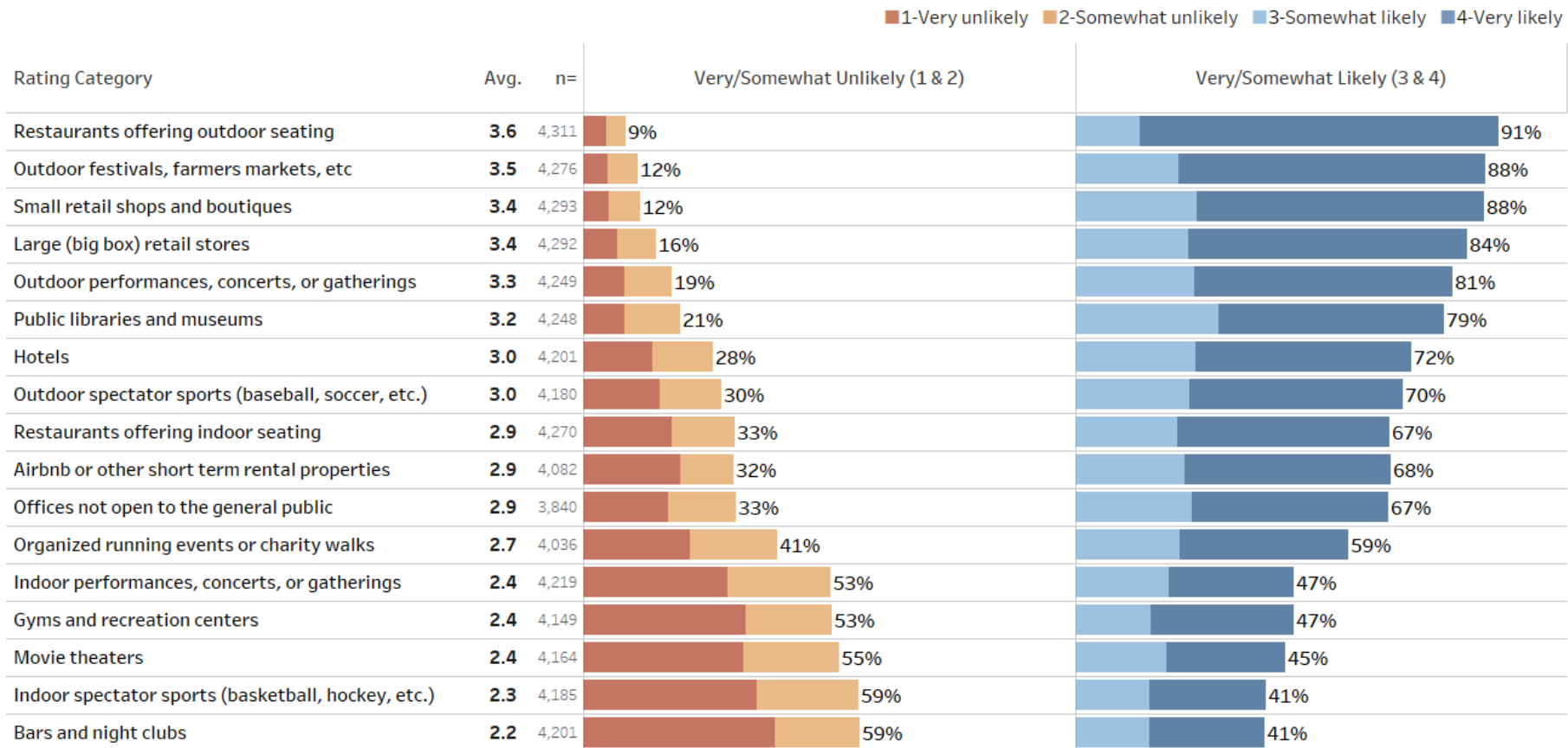


Summer Expectations

People plan to get out but still nervous about some indoor pursuits

Assuming health and safety guidelines (such as distancing and wearing face coverings) are followed, how likely are you to visit the following businesses or events this summer?

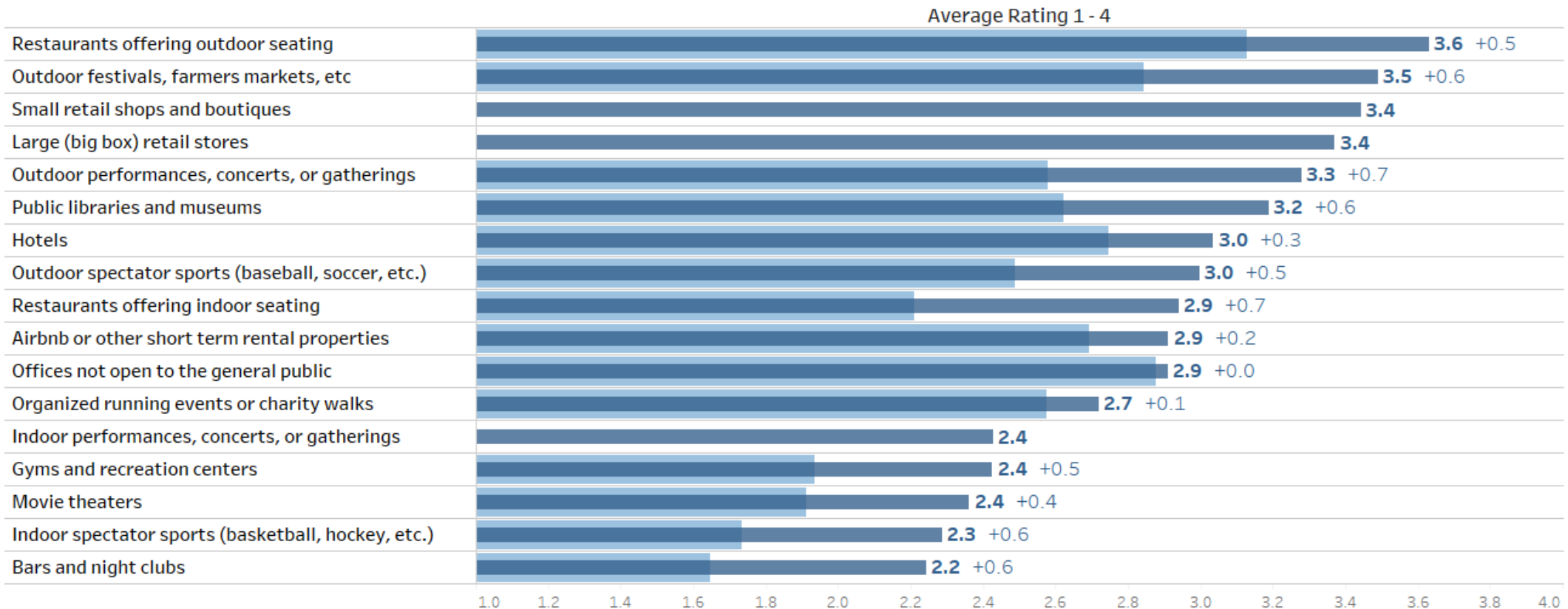
Average Rating and Percent Responding 1 - 4.



Wave 2 vs. 3

Assuming health and safety guidelines (such as distancing and wearing face coverings) are followed, how likely are you to visit the following businesses or events this summer?

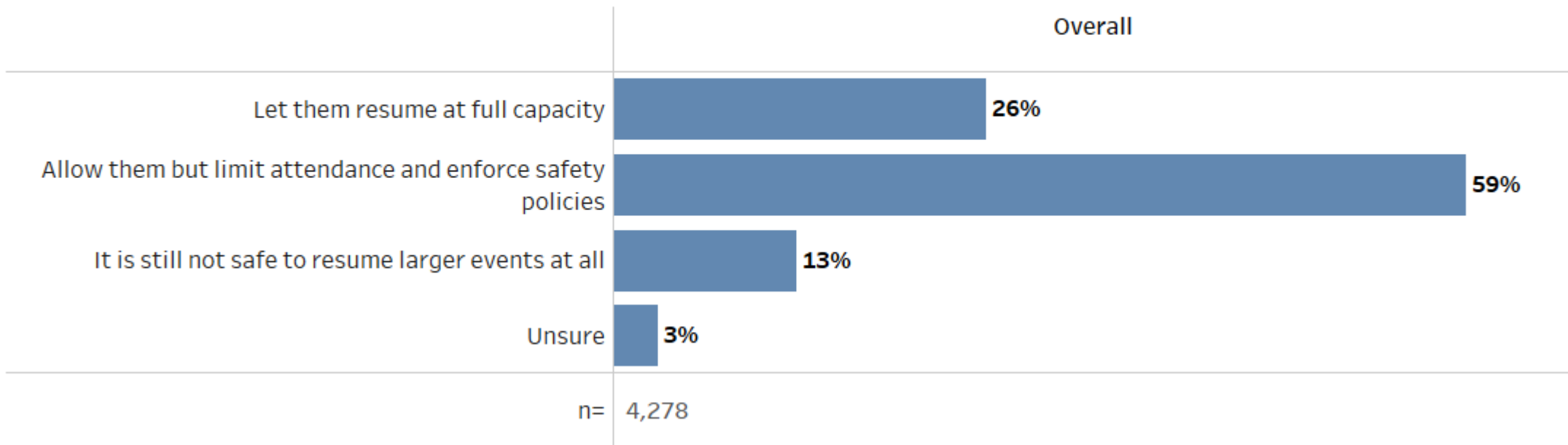
Average Rating, 1 = Very uncomfortable, 4 = Very comfortable.



Events

People are ready for events to resume but want some precautions

What is your feeling on larger outdoor events happening this summer like concerts, festivals, spectator sports, etc.?



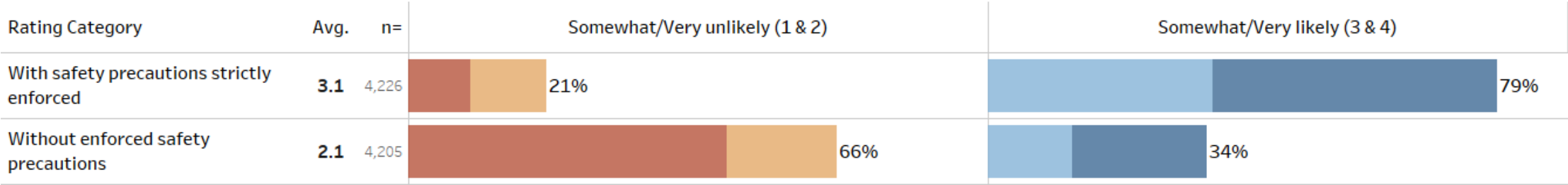
Events

79% will attend events with safety protocols in place

With regards to Covid-19 safety precautions, if an outdoor event such as a concert or arts festival were to occur downtown or near your home this summer, how likely would you be to attend under the following conditions?

Average Rating and Percent Responding 1 - 4, Overall Only

1-Very unlikely to attend 2-Somewhat unlikely to attend 3-Somewhat likely to attend 4-Very likely to attend

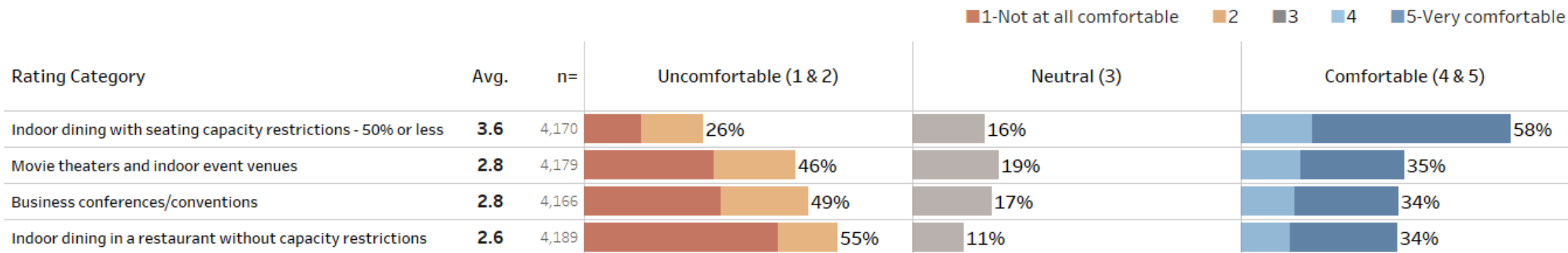


Going Back to Indoor Dining

Comfortable with dining but still cautious on other indoor events

Please rate your level of comfort regarding your health with each of the following while still maintaining proper safety precautions:

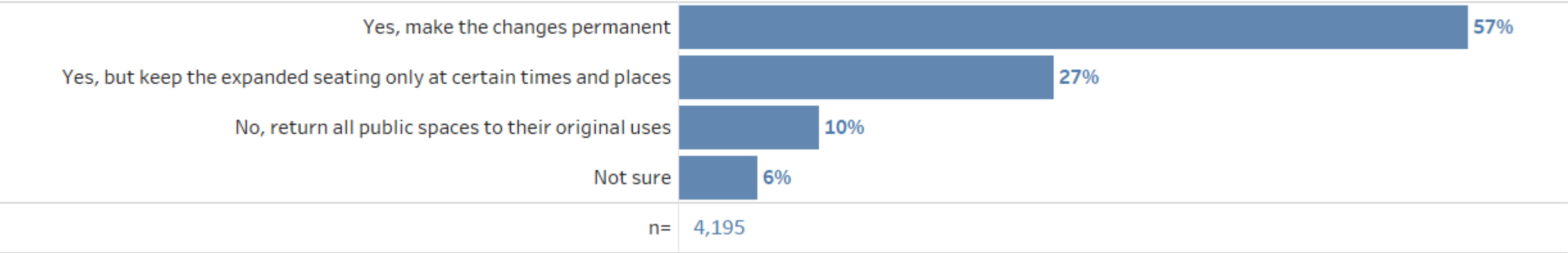
Average Rating and Percent Responding 1 - 5, Overall Only.



Keep the New Outdoor Seating!

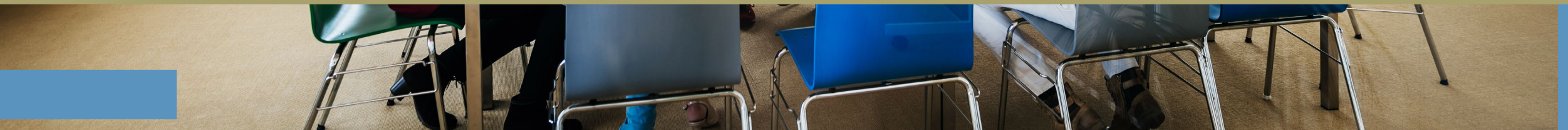
84% would like to keep the expanded outdoor areas at least some of the time and 57% say make them all permanent

Do you think recently expanded outdoor restaurant seating in sidewalks, parking spaces, streets, etc. should be made permanent when Covid-19 restrictions are lifted?





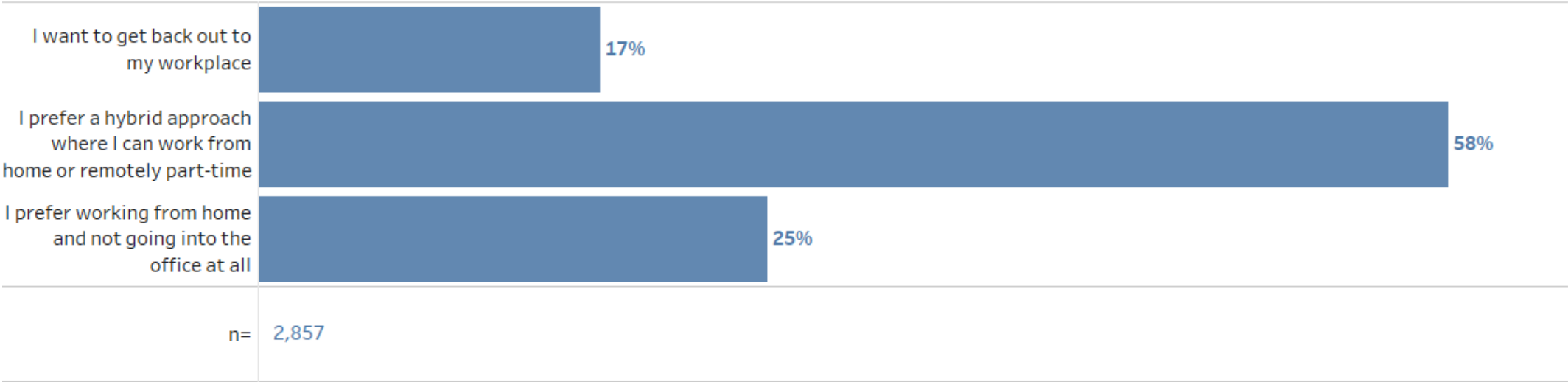
Back to the Office – Or Not



Returning to the Workplace

Only 17% want to go back to the office full time

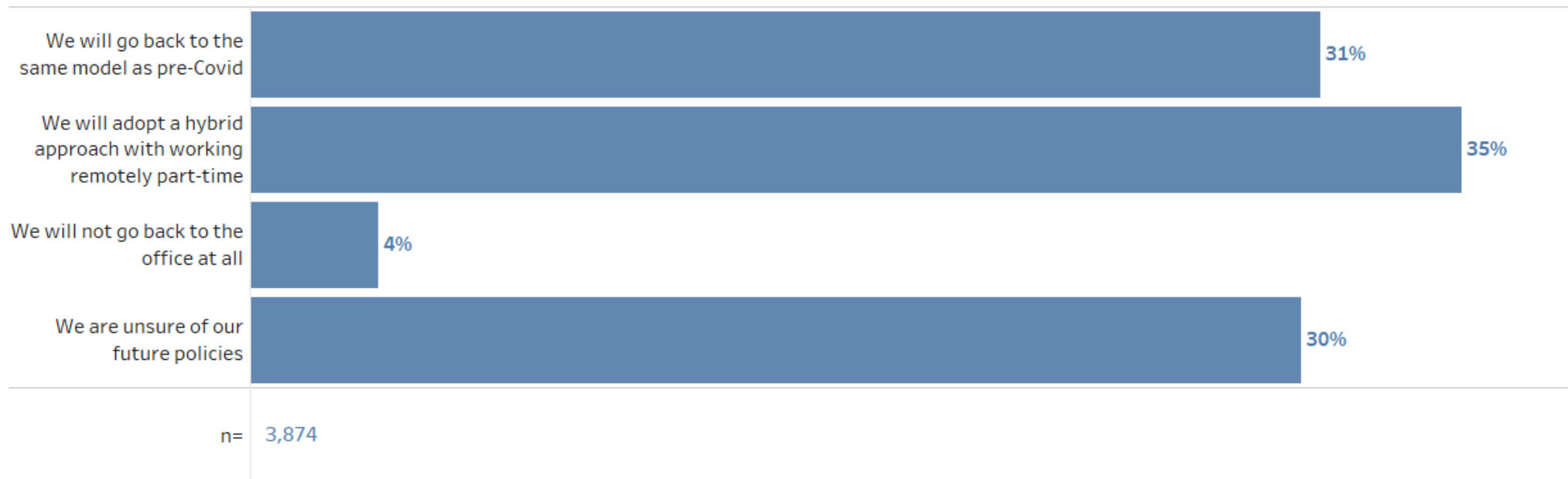
Where do you prefer to work?



Work Expectations

Hybrid office model will become common but still much uncertainty

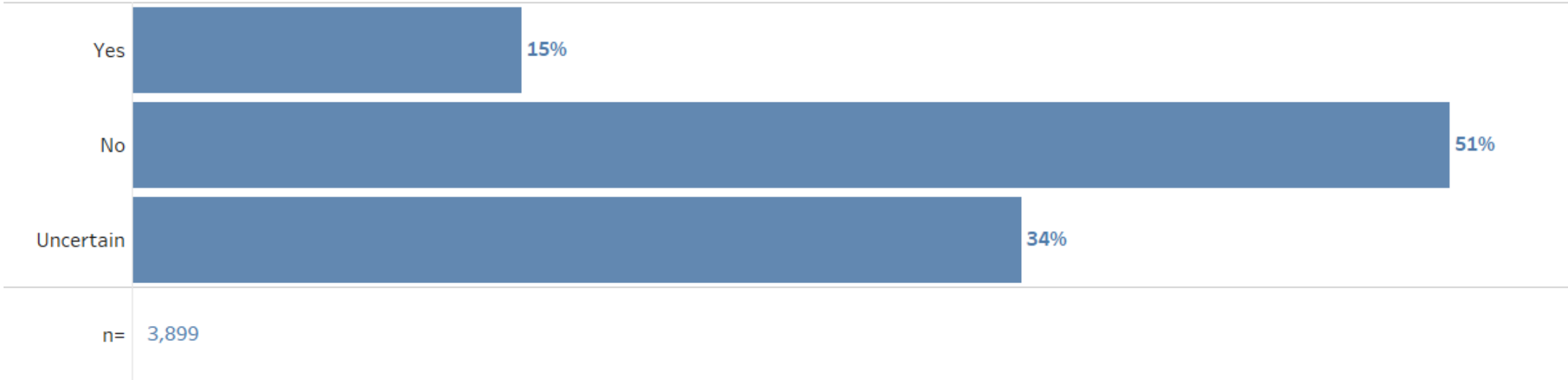
Will your workplace resume pre-Covid attendance policies in the future or change the way people work going forward?



Returning to work

15% say their offices will shrink but uncertainty here too

Has your office space been made smaller, or is it likely to be reduced due to changes caused by Covid?





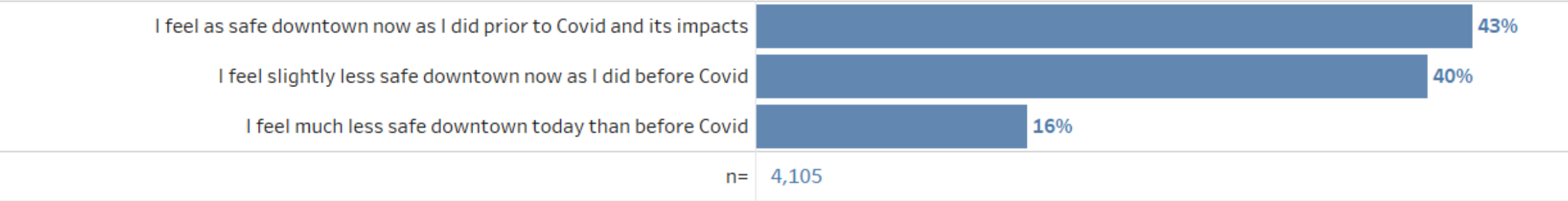
Returning to Downtown



Coming Back Downtown

56% feel slightly or much less safe downtown than before Covid

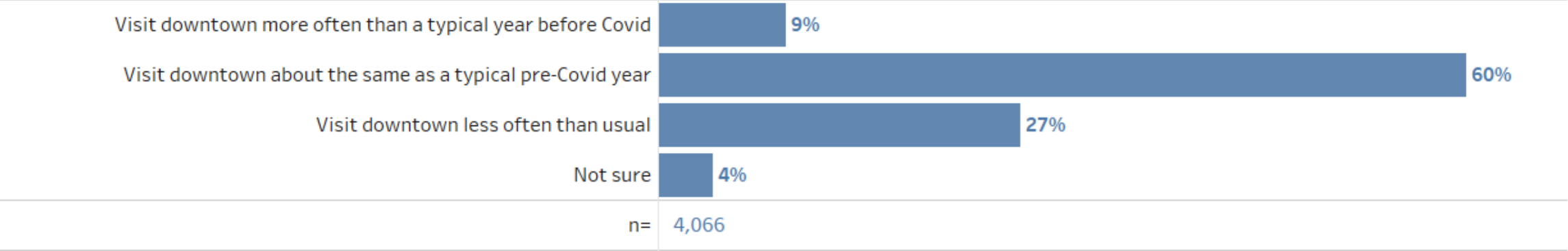
Overall, how safe and secure do you feel visiting downtown today as compared to before Covid?



Coming Downtown

27% plan fewer visits than before Covid

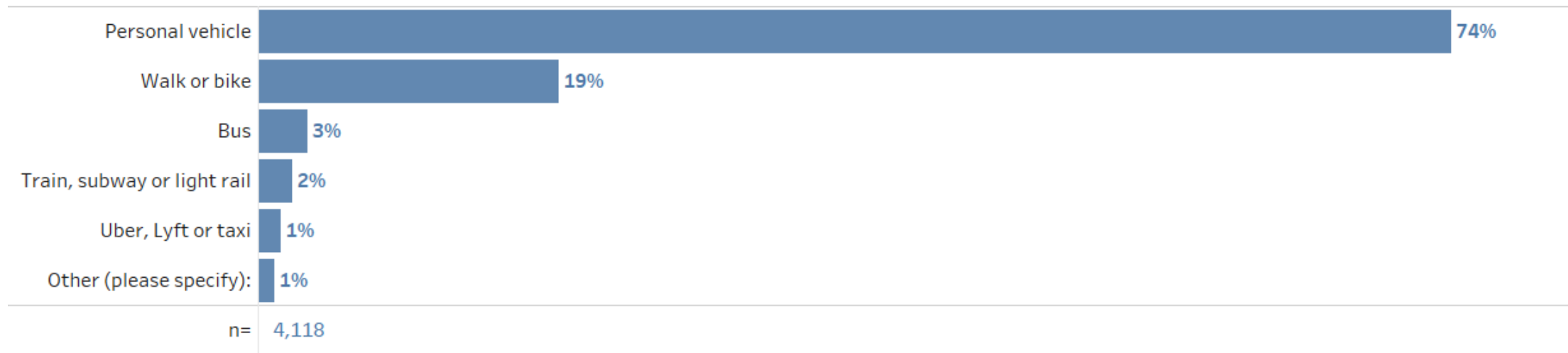
Now thinking about visiting your downtown district for shopping, dining, or leisure, this summer, do you think you will:



Transportation

Personal vehicles are still the dominant mode to get downtown

When you visit the downtown area for work, shopping, dining, etc. what mode of transportation do you use most frequently to travel there?

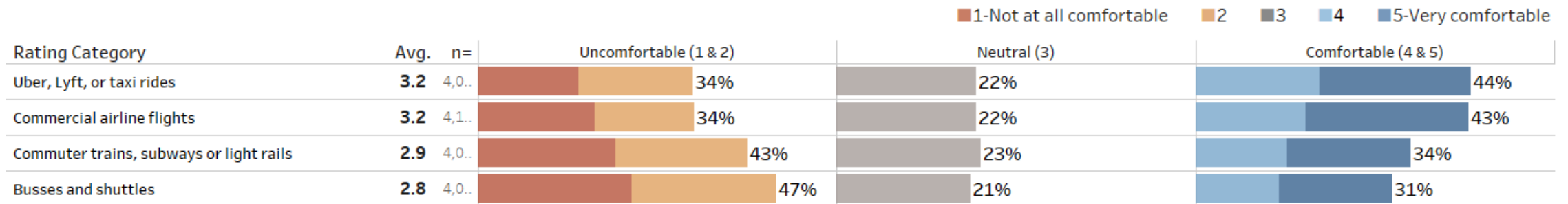


Transportation

People are still nervous about public transportation including airlines and Uber/Lyft

Thinking about this summer, how comfortable are you using the following types of transportation?

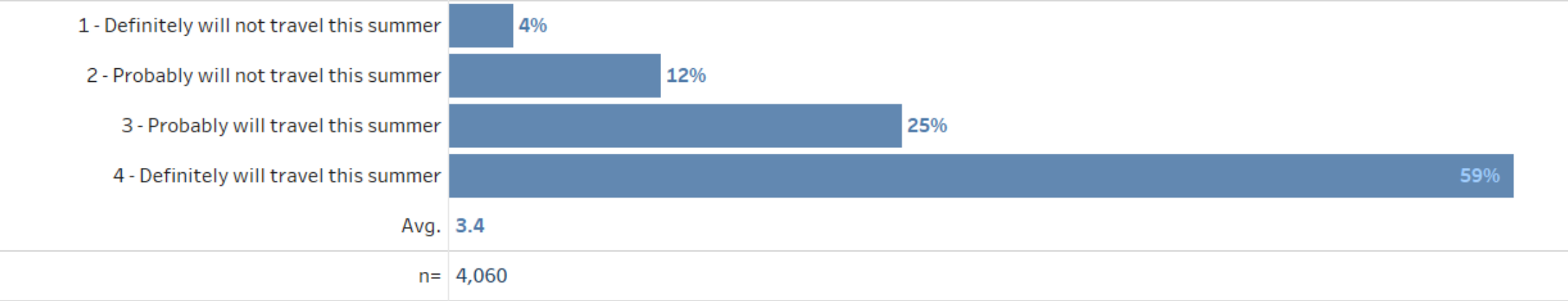
Average Rating and Percent Responding 1 - 5, Overall Only.



Summer Travel

84% are likely to travel this summer

How likely are you to take an overnight leisure trip this summer?





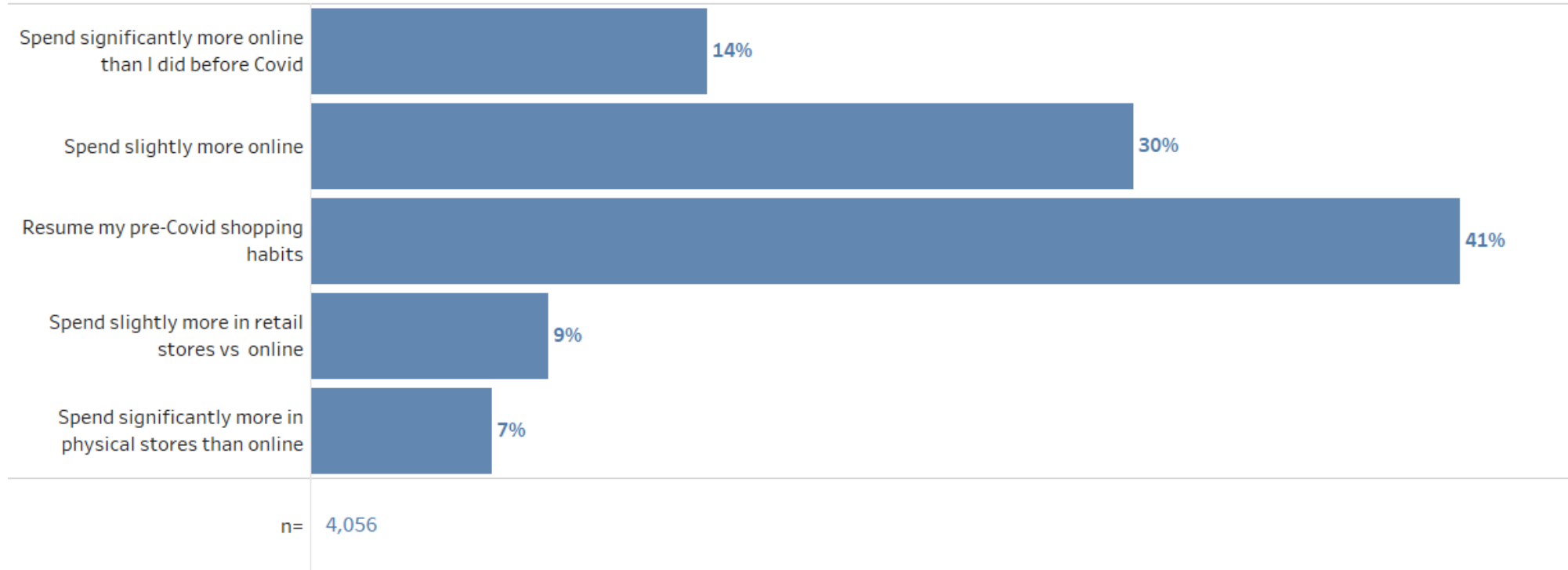
Post-Pandemic Retail and Dining Plans



Spending

The trend toward online shopping was accelerated by Covid

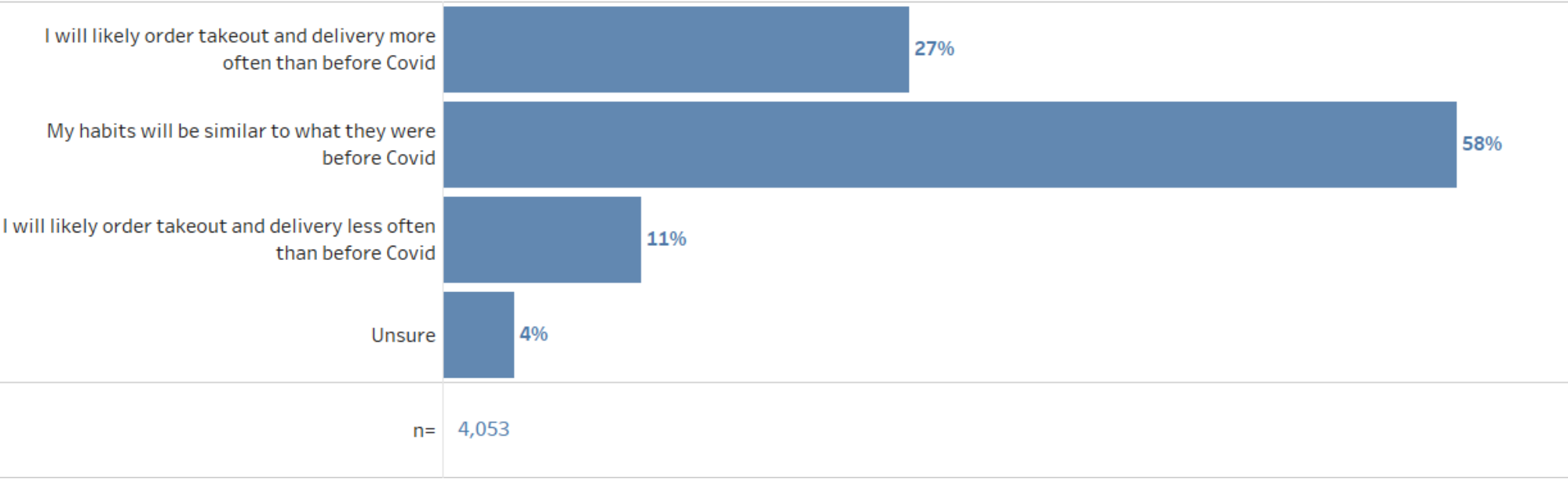
Many people have shopped online more during the pandemic than they did before. Once Covid is no longer a threat, do you think you will:



Dining Habits Post-Covid

Popularity of takeout will continue post-Covid

Many people also ordered more takeout and delivery during the pandemic. Going forward, will you order more or less takeout from restaurants?





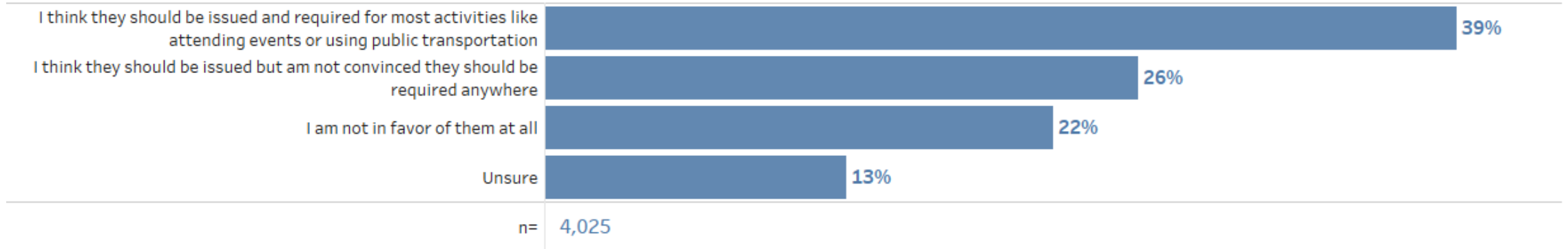
Vaccine Passports



Vaccine Passports

Two thirds nationwide favor Vaccine Passports

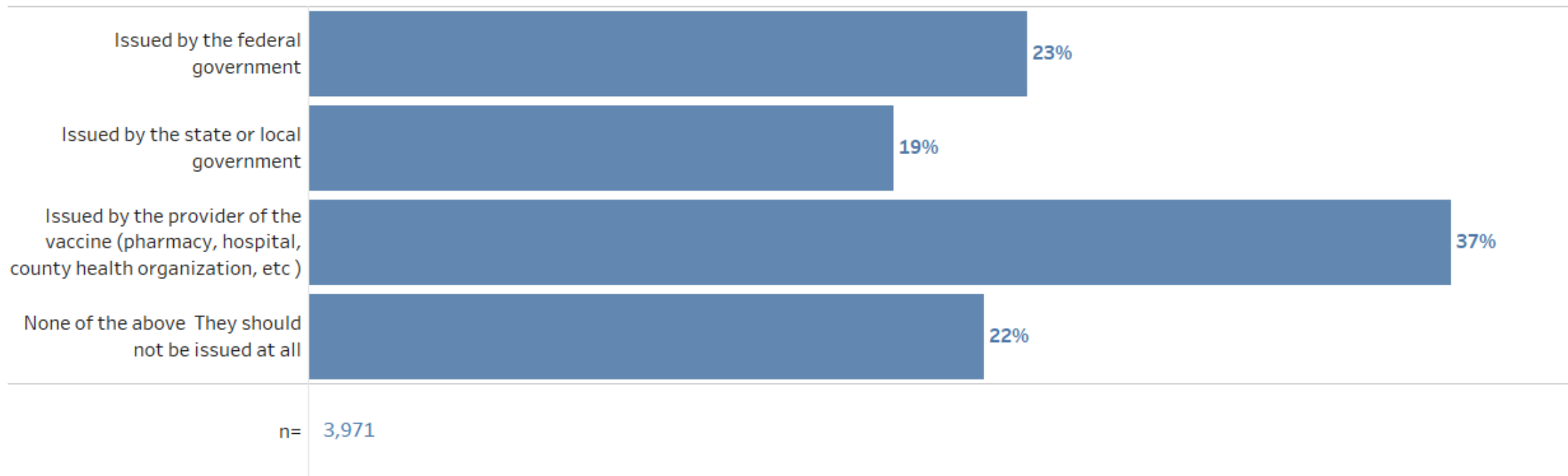
You may have heard about the possibility of “Vaccine Passports” that would allow people who have been vaccinated to easily identify themselves. What are your thoughts on the idea?



Vaccine Passports

But there is no a clear consensus on who should issue them

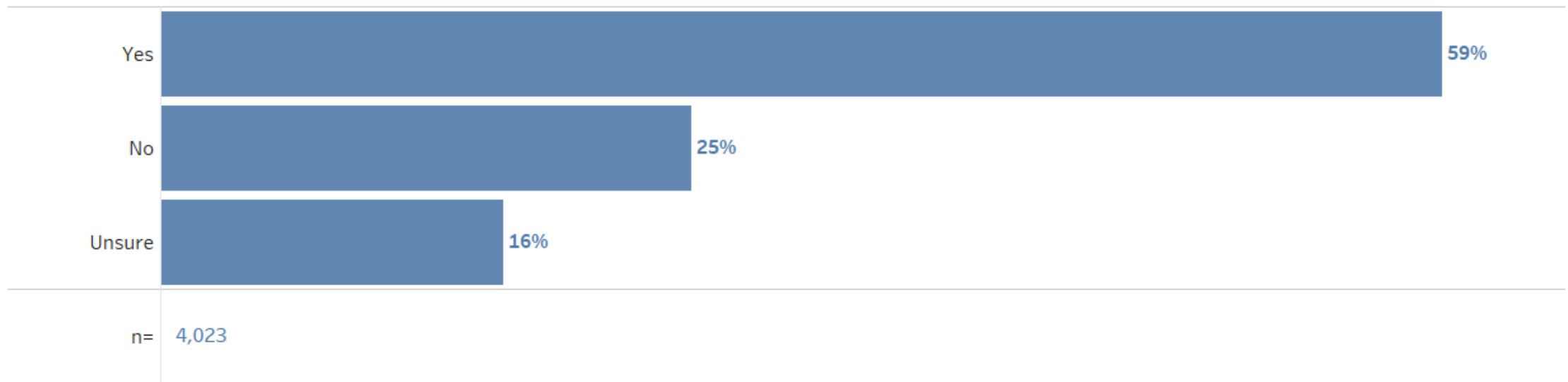
If there are Covid Passports or “Proof of Vaccination” cards, do you think they should be:



Vaccine Passports

Most people want to require vaccines to fly or attend events

Do you favor a Covid vaccine requirement of any kind to enter certain facilities and events or board a commercial airline flight?

























A Tale of 4 Cities ...



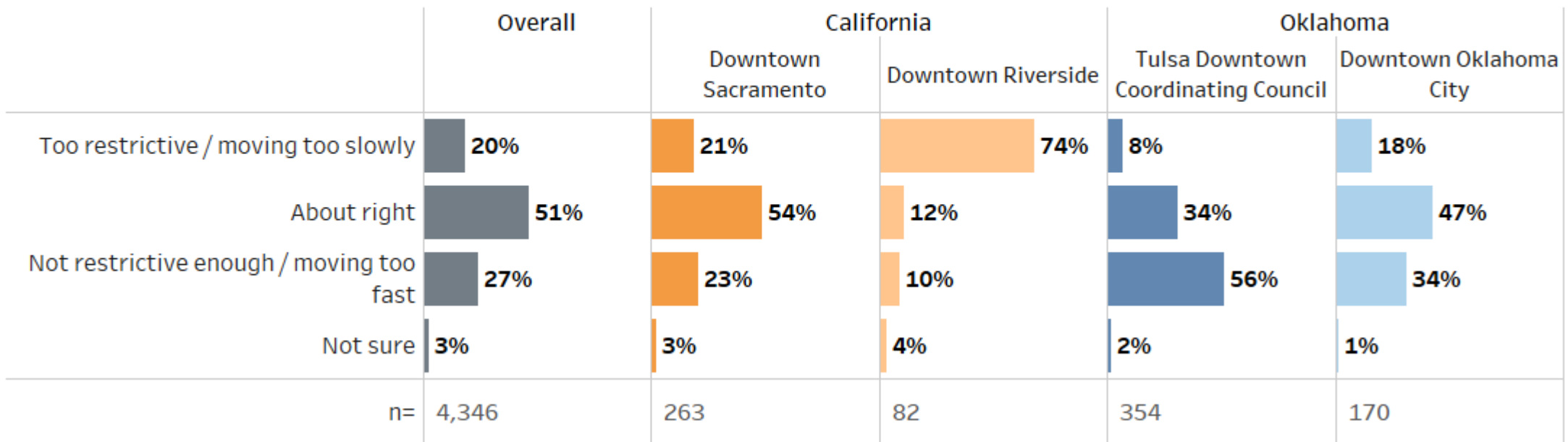
Vaccinations

Have you received a Covid-19 vaccination?

	Overall	California		Oklahoma	
		Downtown Sacramento	Downtown Riverside	Tulsa Downtown Coordinating Council	Downtown Oklahoma City
Yes, I have received one or both Covid-19 shots	 84%	 85%	 38%	 91%	 81%
No, but I intend to get the vaccine when it is available to me	 4%	 6%	 3%	 1%	 1%
No, and I do not intend to be vaccinated	 6%	 5%	 48%	 5%	 11%
No, and I am still unsure whether I will be vaccinated	 5%	 5%	 11%	 3%	 7%
n=	4,323	265	71	351	171

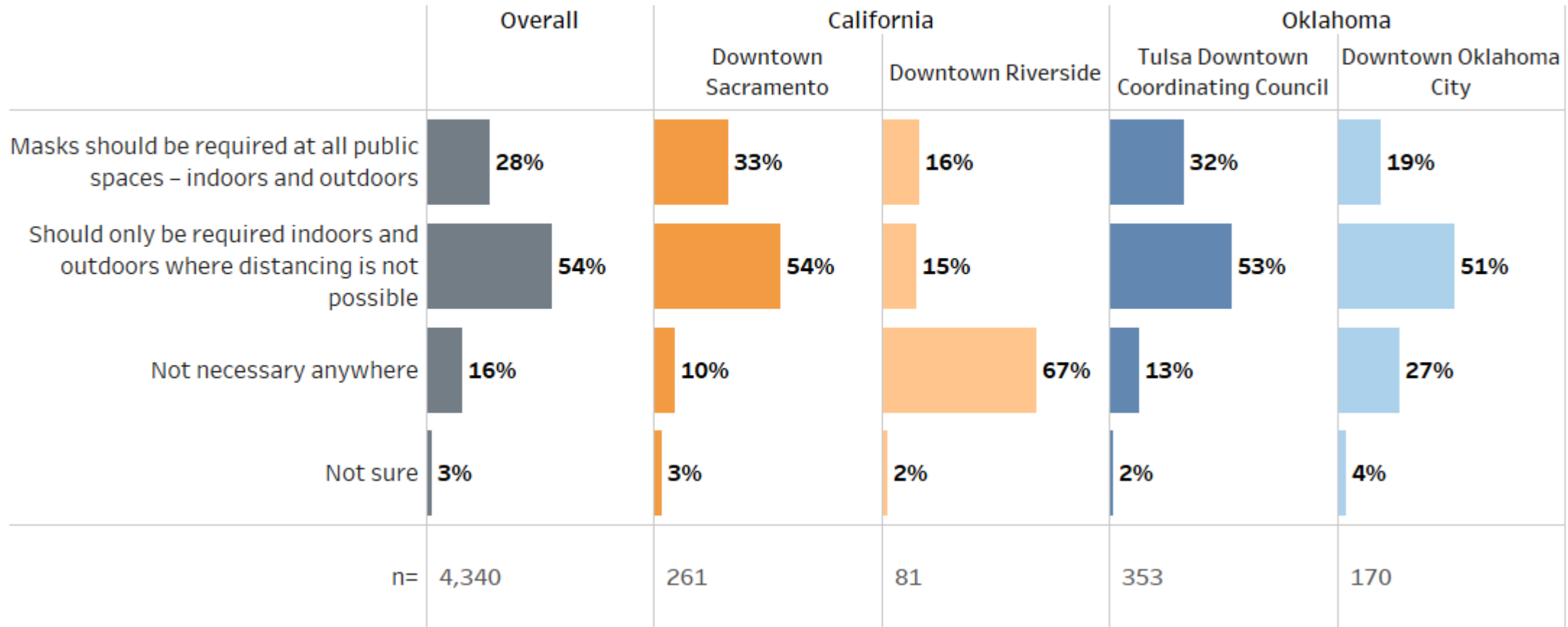
Pace of Lifting Restrictions

Regarding local government policies, do you feel the current pace of easing restrictions on indoor dining, movies theaters, special events, etc. in your community is:



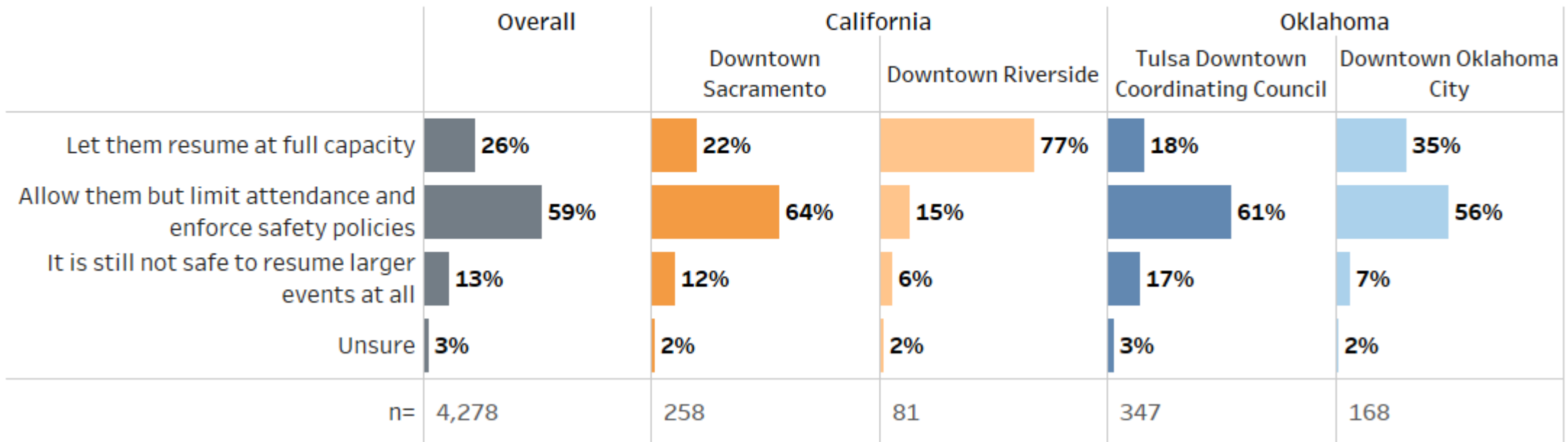
Requiring Masks

How do you feel about public mask requirements in your area as we move into the summer season?



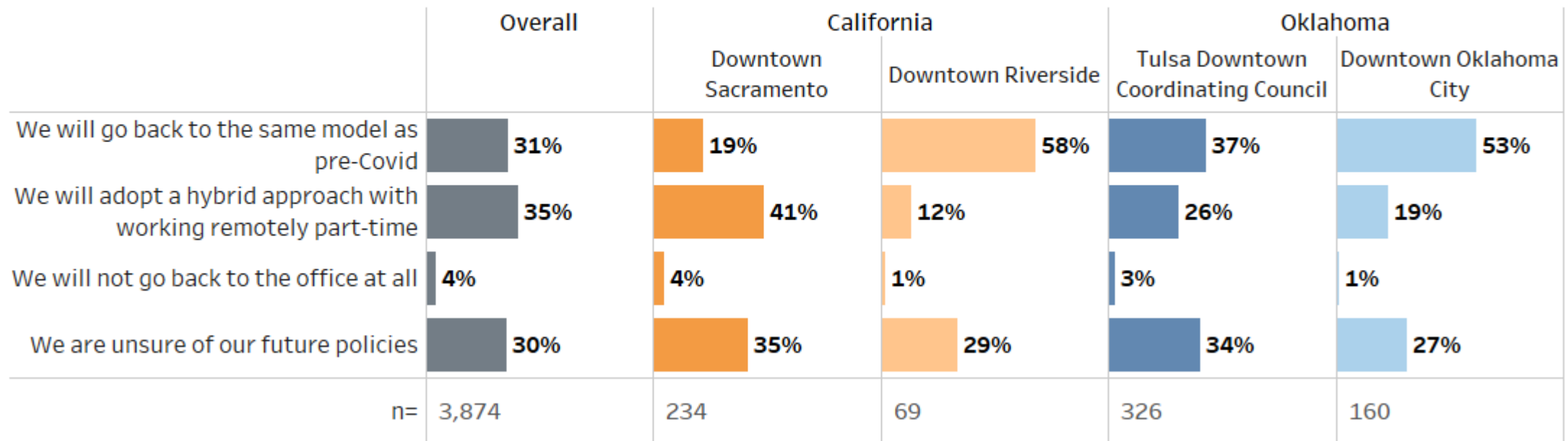
Events

What is your feeling on larger outdoor events happening this summer like concerts, festivals, spectator sports, etc.?



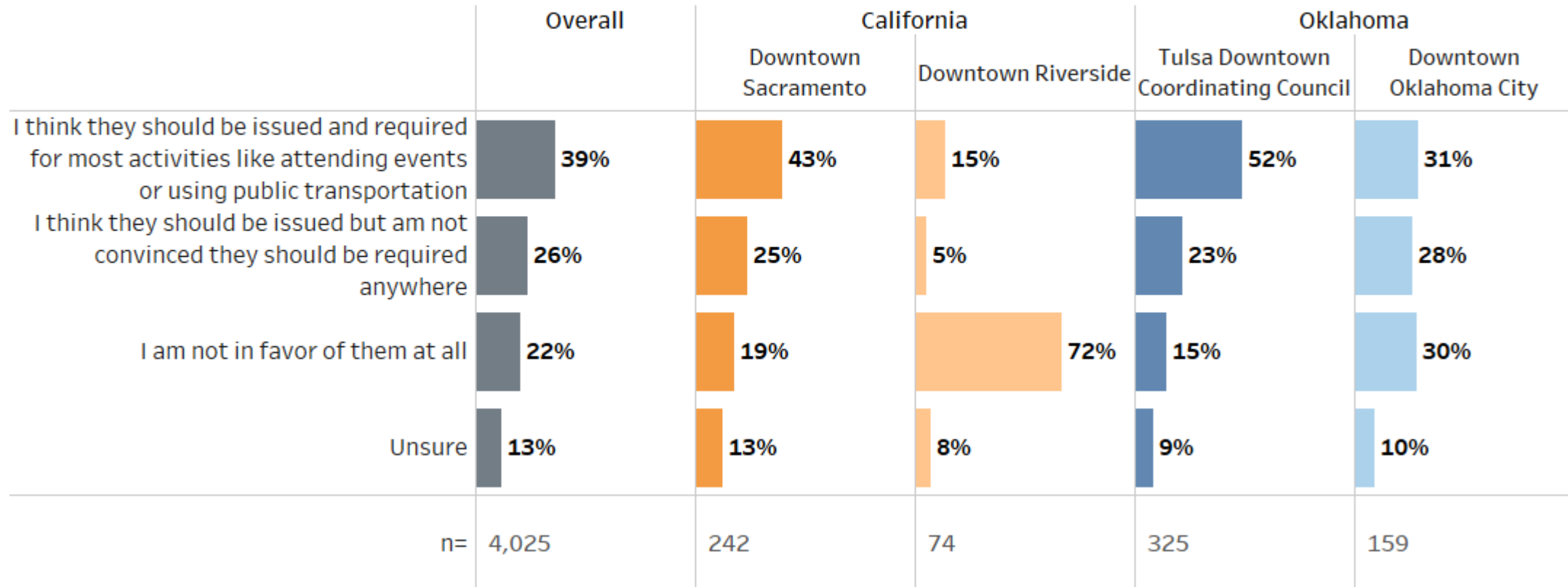
Work Expectations

Will your workplace resume pre-Covid attendance policies in the future or change the way people work going forward?



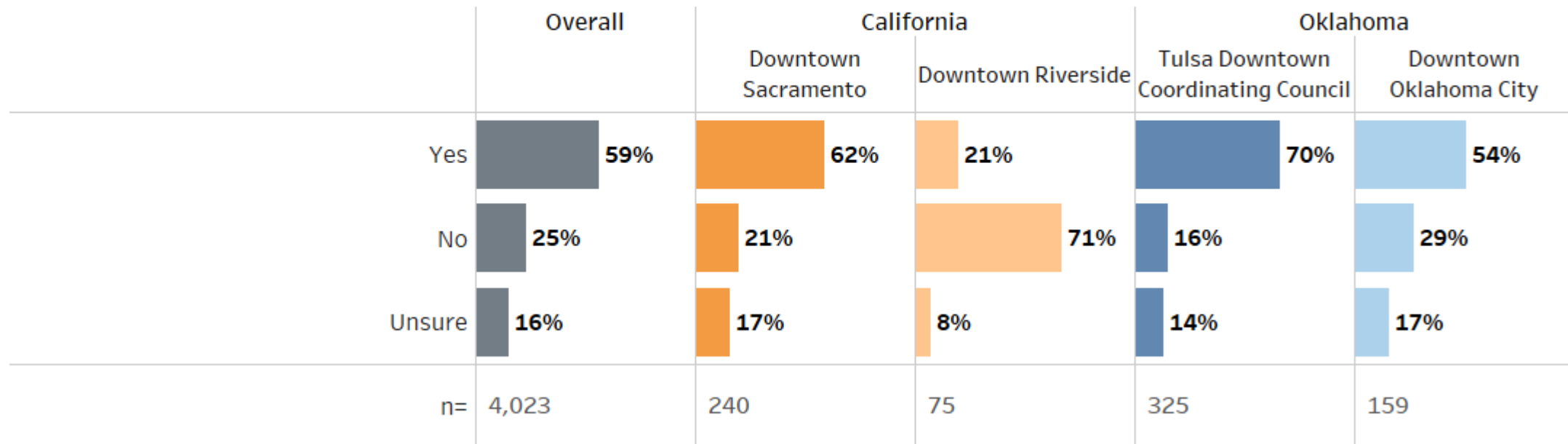
Vaccine Passports

You may have heard about the possibility of “Vaccine Passports” that would allow people who have been vaccinated to easily identify themselves. What are your thoughts on the idea?



Vaccine Requirements

Do you favor a Covid vaccine requirement of any kind to enter certain facilities and events or board a commercial airline flight?



Age of Respondent

Age of respondent

	Overall	California		Oklahoma	
		Downtown Sacramento	Downtown Riverside	Tulsa Downtown Coordinating Council	Downtown Oklahoma City
Avg.	48.0	49.2	48.8	46.0	43.4
n=	3,860	235	69	313	151

Key Takeaways

- People are ready to move toward normal but most still want some precautions
- Most want to ditch their masks outdoors unless they're in a crowd
- Still cautious with indoor sports, concerts, movies, etc. but ready to dine inside



Key Takeaways

- Pent up demand to attend outdoor events
- Expanded outdoor seating is a big hit. 84% want some or all changes to be permanent
- Migration to online shopping accelerated and requires ongoing adjustments



Key Takeaways

- People will travel this summer but most still hesitant to get on a plane
- Road trips likely to continue as preferred vacation mode in short term
- Increase in takeout/delivery will continue past Covid. Raises issue of “cocktails to go”



Key Takeaways

- Most have safety concerns downtown as property crimes spiked in many districts
- Messaging on safety and events will be key to enticing people back
- Strong support for vaccine passports but no consensus on issuing them
- Optimism is HIGH across the country!





Discussion



RRC
ASSOCIATES