

Founded in 1998, the **Downtown Center Business Improvement District (DCBID)** has been a catalyst in Downtown Los Angeles' transformation into a vibrant 24/7 neighborhood. A coalition of nearly 2,000 property owners in the Downtown Center, the DCBID members are united in their commitment to enhance the quality of life in Downtown Los Angeles.

Bounded by the Harbor Freeway to the west, First Street to the north, Main and Hill streets to the east, and Olympic Boulevard and 9th Street to the south, the organization helps the 65-block Downtown Center achieve its full potential as a great place to live, work, and play.

DCBID services include:

urban centers.

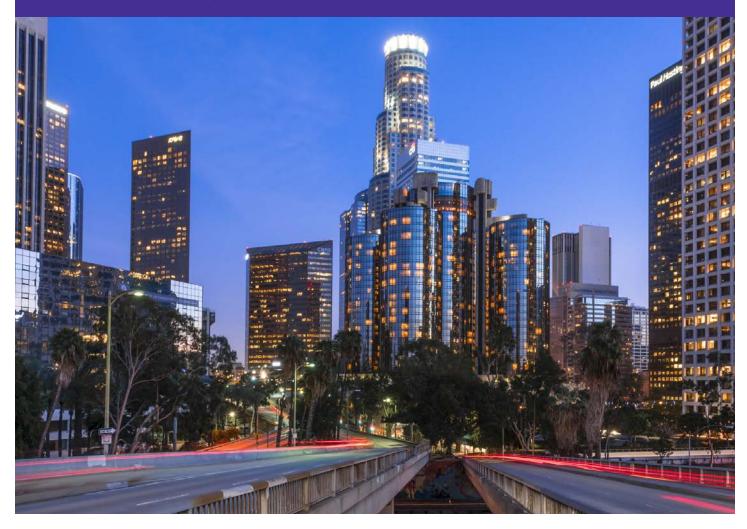
- 24 Hr. Safety and Maintenance Services "The Purple Patrol"
- Economic Development and Business Recruitment/Retention programs
- Strategic Marketing Programs that promote the area to residents, workers and visitors. For more than 20 years, these programs and initiatives have been the driving force behind the Downtown Los Angeles Renaissance that has seen the city become one of the nation's most dynamic



# **INSIDE**

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# ABOUT THE SURVEY



The DTLA 2020 Survey was conducted by the DCBID and Renegage Marketing (renegage.com) from September 26 – November 14, 2019.

A total of 3,656 respondents, 18 years of age or older, completed a 10-15 minute online interview. The margin of error associated with the total sample size of the 2020 study is 1%.

The goal of the survey was to understand the characteristics, attitudes, preferences, and behaviors of Downtown residents, workers, and consumers; as such, it should not be construed as a comprehensive demographic analysis of Downtown Los Angeles.

Extensive outreach was conducted to promote the survey including, but not limited to, postcards delivered to residential and commercial properties and retail locations, in-person outreach at events and venues across Downtown LA, a social media campaign on Facebook, Twitter, and Instagram, front page placement on DowntownLA.com, and direct email to over 50,000 people.

# **EXECUTIVE SUMMARY**

For the past 15 years the DCBID has conducted a biennial survey of DTLA residents, workers, and visitors to grasp the who's, what's, and why's of DTLA's remarkable transformation – and we utilize this data to recruit the next wave of residents, businesses, retailers, and investors. As we prepared for a March 2020 release of this year's report, the initial wave of the Coronavirus and its crippling economic effects hit and it quickly became apparent that everything was about to change.

As the situation has evolved, we have seen DTLA residents come together to support local businesses, celebrate our health care workers, share vital resources, and so much more. All of this in confirmation of our survey findings – that Downtowners are passionate, knowledgeable, committed to their neighborhood, and optimistic about the future. These are the fruits of the 20+ years of community building efforts led by the DCBID along with our many partners.

What also emerges from the 3,656 responses is a sense of the uniqueness of Downtown among the many neighborhoods in and around Los Angeles. Nowhere else will you find all the elements that converge to create the urban experience that is DTLA. We also delved deeper into the attitudes and behaviors of several key segments of the population such as residents with children, office workers, and arts and culture patrons to learn much more about why people move to Downtown LA, how they come to their decision, and what might change their decisions.

These sentiments along with much more invaluable survey data will serve as a tool to guide DTLA's recovery. To further our efforts, we have launched a new tracking study to gauge the sentiments of Downtowners on an ongoing basis – a valuable tool for DTLA stakeholders to help them plan and prepare for recovery.

We know that there is much work to be done, but we know that, as a community, DTLA is up to the task. It is in that spirit that we are now releasing the results of our DTLA 2020 Survey. We hope you will continue to work with us to make Downtown LA the place we all know it can be again.

Sincerely,

# **Suzanne Holley**

President & CEO, Downtown Center BID

# **HIGHLIGHTS**

**70**%

of residents and workers feel they are part of the Downtown community. 71%

believe that DTLA is moving in the right direction.

80%

of Downtown LA residents are passionate about DTLA.

- 54% of residents have moved to DTLA in the past 5 years
- 79% of workers say DTLA is a desirable location for their industry
- The most requested retail category is Supermarkets (69%) followed by Clothing & Apparel (51%)

# WHO IS DTLA?

With a population growing as rapidly as Downtown's it's hard to generalize, but our survey identified a variety of characteristics – from high levels of educational and professional accomplishment, to enthusiasm for DTLA's community and culture – that paint a vivid picture of today's Downtowner.

# I **LIVE** in DTLA

**1,261** Responses



38 Median Age



\$123K Average HH Income



81% BA or higher



**84%**Want more
Supermarkets

TOP VISITED SPOTS

27% Live in South Park (#1 overall)

75% Rent an apartment or condo

54% Have lived in DTLA for less than 5 years

46% Have tried shared mobility options (vs. 30% of all respondents)

84%

FIGat7th

82%

**Grand Central Market** 

**71%** 

THE BLOC

# I WORK in DTLA

**1,766** Responses



41 Median Age



\$122K Average HH Income



**78%**BA or higher

79% Say DTLA is a desirable location for their industry

100%

44% Would consider living in DTLA

26% Use Metro as their primary commuting method

TOP VISITED SPOTS

77% FIGat7th

68%

**Grand Central Market** 

**63%** THE BLOC

# I LIVE & WORK in DTLA

**659** Responses

**52%** of residents **37%** of workers

**76%** Want to live close to work

**80%** Are passionate about DTLA

**55%** Regularly walk to work (vs. 19% of all respondents)

oz F

31% Do not own or lease a motor vehicle (vs. 12% of all respondents)

**23%** Work out of a home office (vs. 12% of all respondents)

WHERE DO YOU WORK?

28%

Financial Dist.

16%

**South Park** 

11%

**Historic Core** 

# **KEY SEGMENTS**

New to our 2020 survey were questions targeting five key segments of the population who we wanted to learn more about. Their responses give us a deeper sense of who they are and what they care about, and practical insights on where DTLA is going.

# **FAMILY FOCUSED**

Have at least 1 child or considering





### **TOP PRIORITIES:**

76% PARKS AND GREEN SPACE 44% KID-FRIENDLY ACTIVITIES 41% SCHOOLS 45% want to stay in DTLA

# **RECENTLY RELOCATED**

# DTLA resident less than 5 years





### **TOP FACTORS:**

- 1. URBAN LIFESTYLE
- 2. CENTRALLY LOCATED
- 3. DISTANCE TO WORK

**76%** are passionate about DTLA

# **PROSPECTIVE RESIDENTS**

# Would consider living in DTLA





### **TOP PRIORITIES:**

- 1. DISTANCE TO WORK
- 2. CENTRALLY LOCATED
- 3. VALUE FOR THE MONEY

85%

say DTLA is heading in the right direction

# **OFFICE WORKERS**

# Work in an office building





### **PARKING**

39% PAID FOR BY EMPLOYER
35% DO NOT NEED
26% PAY FOR THEIR OWN

45%
work for a company
with less than 20 years
in DTLA

# **ARTS PATRONS**

# Regularly attend culture events





# **TOP REGULARLY VISITED VENUES:**

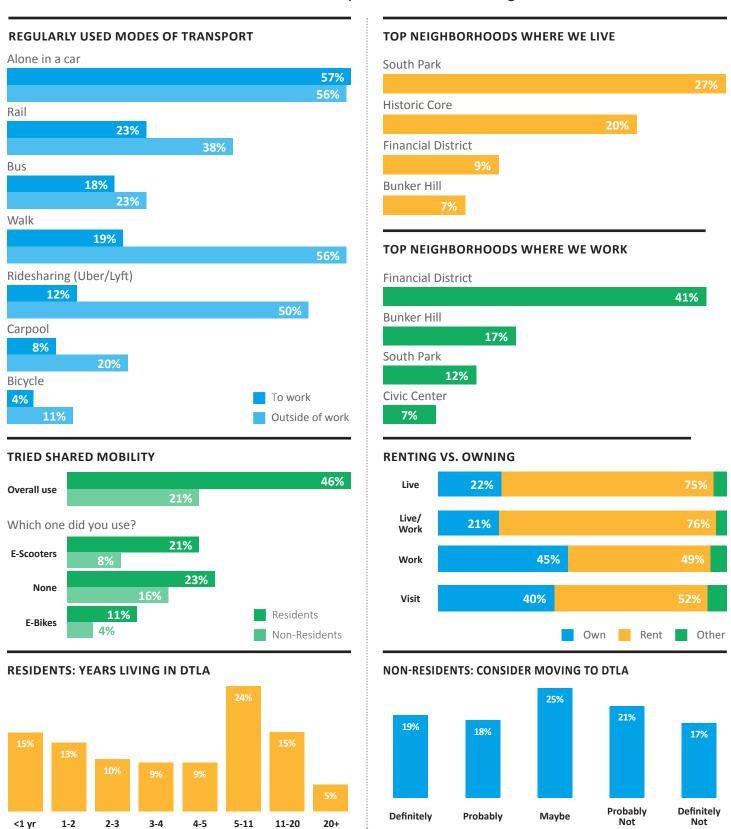
69% THE MUSIC CENTER
53% THE BROAD
47% MOCA

# 66% of all arts & culture engagement is in DTLA



# LIVING & WORKING

Over half of Downtown's residents moved here in the past 5 years. They are highly mobile, with significant commuter use of rail, bus, and other alternative transportation modes. About half of non-residents said they would consider moving to DTLA in the future.

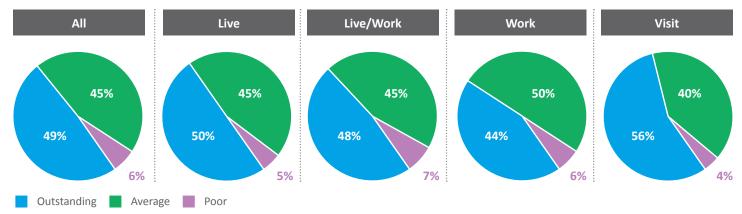




# **ATTITUDES**

Overwhelming majorities of respondents expressed strongly positive attitudes about Downtown, while only 6% gave it an overall poor rating. Despite concerns about homelessness and other issues, over 70% believe DTLA is heading in the right direction.

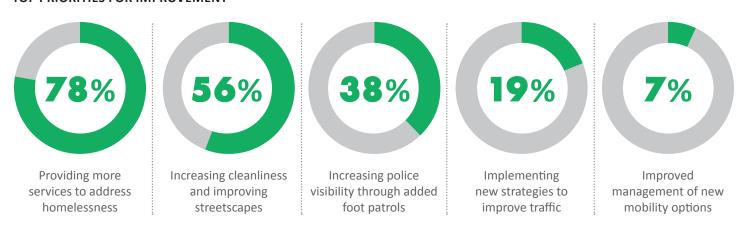
### **OVERALL EXPERIENCE WITH DTLA**



ATTITUDES REGARDING NEIGHBORHOODS	Live	Live/Work	Work	Visit
I consider myself knowledgeable about my neighborhood	87%	90%	82%	90%
It is important for me to be part of a community	85	86	80	85
It is important for me to live close to where I work	77	94	75	86
I regularly walk around my neighborhood to discover what's new	90	87	73	75

ATTITUDES REGARDING TRENDS	Live	Live/Work	Work	Visit
I love DTLA!	86%	84%	78%	72%
Downtown LA is moving in the right direction	74	68	68	72
I am passionate about Downtown LA	79	80	55	60
I feel like I am part of the Downtown LA community	70	70	53	37

### TOP PRIORITIES FOR IMPROVEMENT

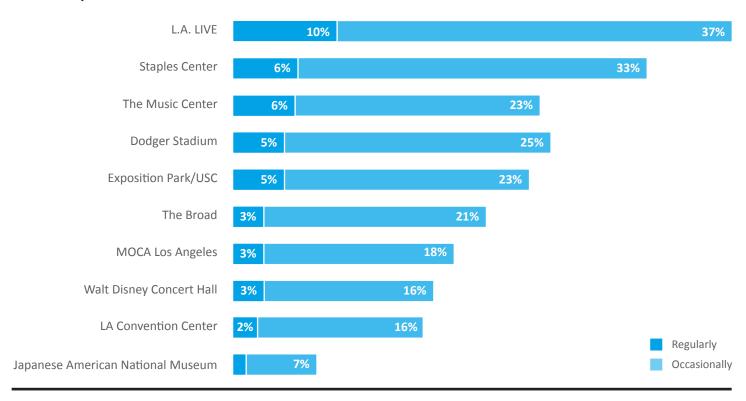




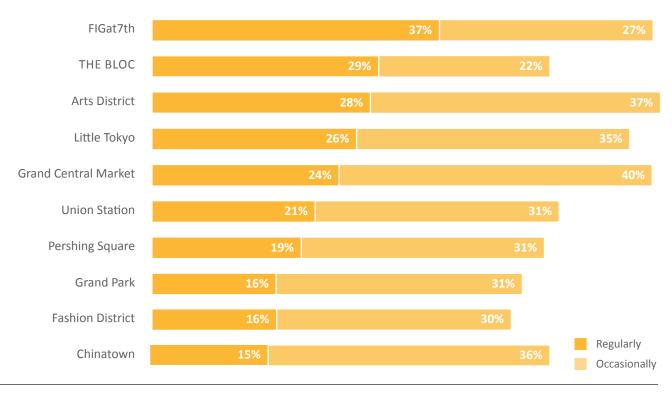
# **PLACES**

Downtown's top venues were once again LA Live/Staples Center and The Music Center, but there were also two newcomers – THE BLOC and the Arts District – added to the top 10 locations.

### **MOST FREQUENTLY VISITED VENUES**



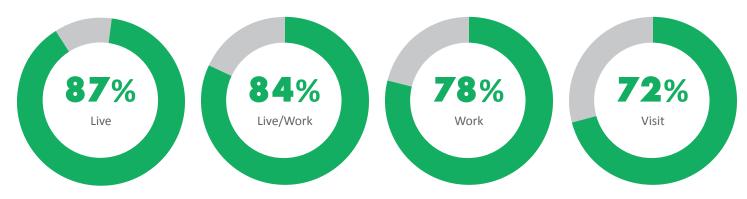
### MOST FREQUENTLY VISITED LOCATIONS



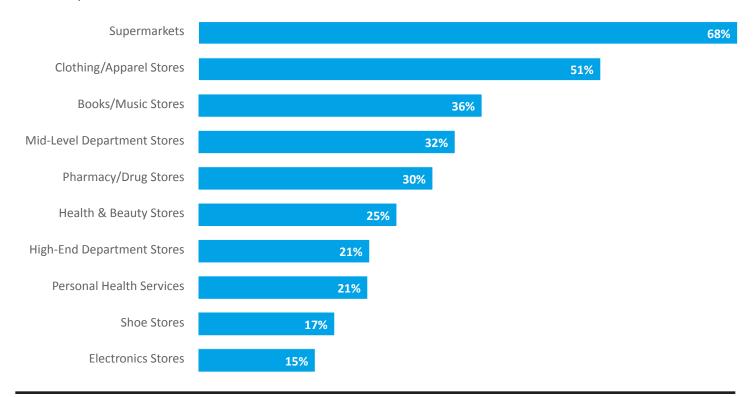


The DTLA retail market has grown significantly over the past several years, and Downtowners want more – with supermarkets the most desired category and Trader Joe's the most desired retailer.

### I APPRECIATE THE INCREASE IN THE NUMBER OF RETAIL STORES THAT HAVE OPENED IN DTLA



### **MOST REQUESTED RETAIL CATEGORIES**



### **MOST REQUESTED RETAIL CHAINS**



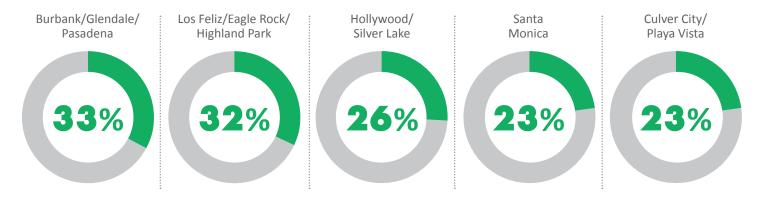




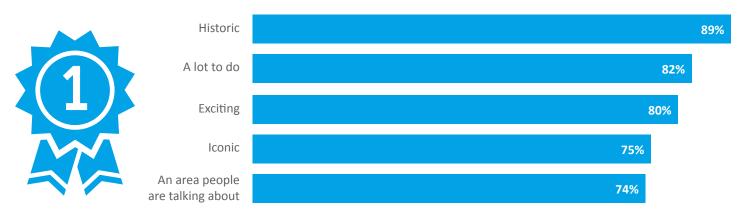
# **NEIGHBORHOOD COMPS**

We asked respondents to compare Downtown to other areas of LA in which they would consider living. DTLA ranked at the top as an exciting place with lots to do, with convenience and value as prime reasons for choosing Downtown.

### TOP NEIGHBORHOODS CONSIDERED OTHER THAN DTLA



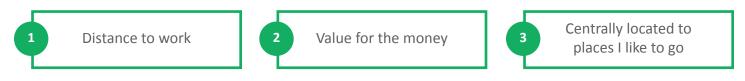
### **DTLA RANKED 1ST**



### DTLA RANKED IN THE TOP HALF



### TOP MOTIVATIONS TO MOVE TO DOWNTOWN LA





# DTLA VISITOR PROFILE

Prepared by

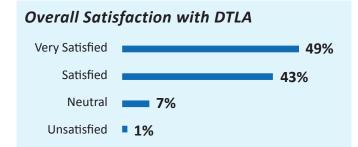
Destination Analysts

Data on this page are from a comprehensive Downtown Los Angeles visitor profile study, conducted by Destination Analysts on behalf of the Los Angeles Tourism & Convention Board. It is based on 1,002 completed in-person intercept surveys conducted between July and November 2018.

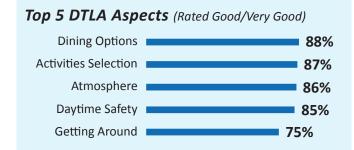
# The Downtown Los Angeles Visitor

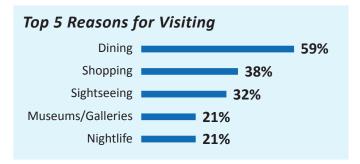


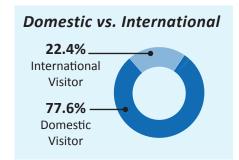
22 million Total Visitors—16% increase since 2015
15 million Non-local Visitors—17% increase since 2015
1.6 million Hotel Visitors—25% increase since 2015















# **SEGMENTS**

Among the over 3,500 people who took the survey are several sub-groups with particular significance for the future of DTLA. To learn more about these groups, we established specific criteria within the survey to define each segment and created a targeted follow-up survey for each one.

FAMILY FOCUSED	DTLA residents with at least one child or are considering children.
RECENTLY RELOCATED	DTLA residents who have moved to the area within the past five years.
PROSPECTIVE RESIDENTS	Non-residents who would consider living in DTLA in the near future.
OFFICE WORKERS	Those who work in a DTLA office building environment.
ARTS PATRONS	Regularly attend arts and culture events at DTLA venues.

Within the follow up surveys were some questions that allowed respondents to express themselves in an open text format. From these responses we generated word clouds to help express their views on DTLA's strengths as a neighborhood in which to live and/or work and the challenges it still has to overcome.

### **STRENGTHS**



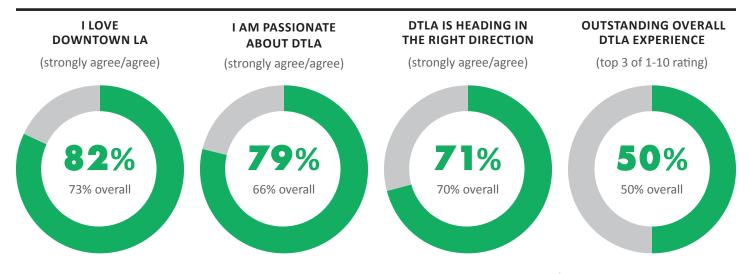
### **CHALLENGES**

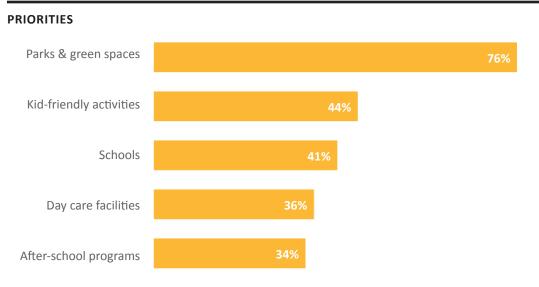




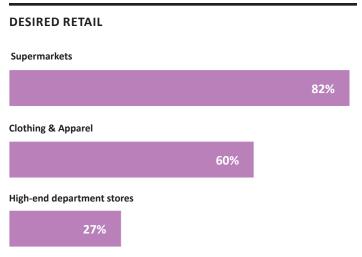
# FAMILY FOCUSED

Almost half of our family respondents said it was important for them to stay in DTLA, and they overwhelmingly expressed the need for more parks, green spaces, and kidfriendly amenities.







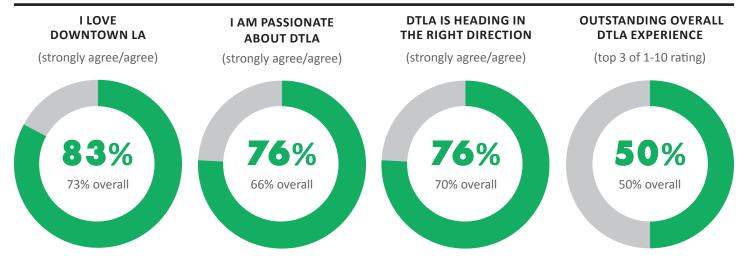


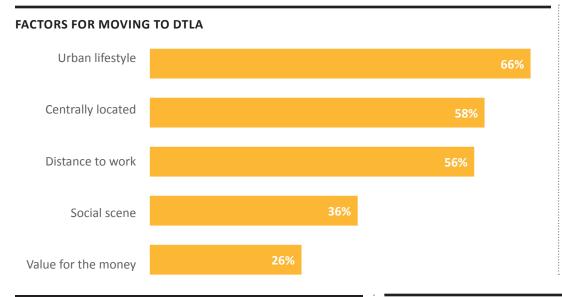




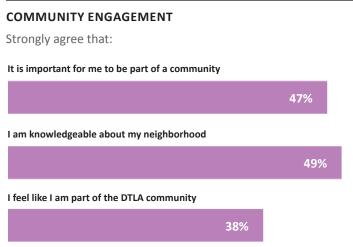
# RECENTLY RELOCATED

The overall appeal of an urban lifestyle is the main draw for new DTLA residents, who also identified a variety of factors, such as access to transit, walkability, and the social scene.







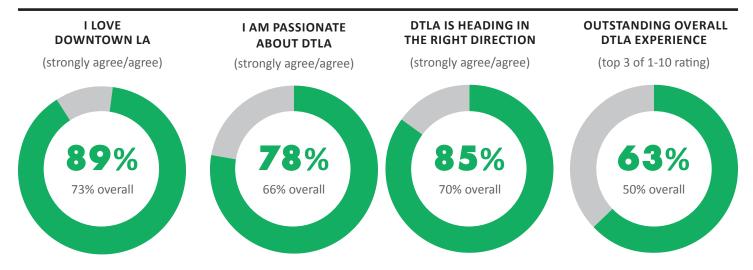


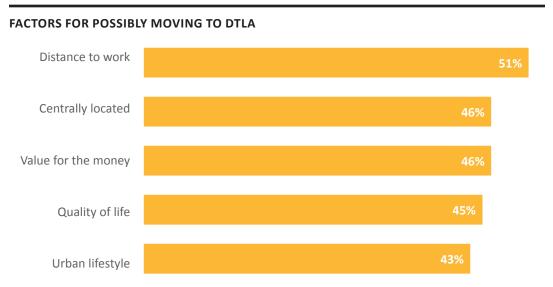


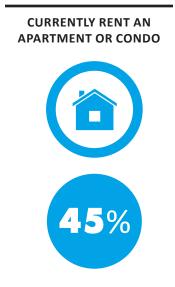


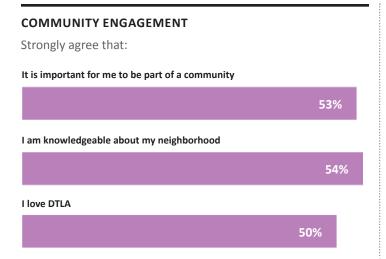
# **PROSPECTIVE RESIDENTS**

This segment expressed the highest levels of engagement, enthusiasm and overall experience with DTLA, but also had more practical reasons for considering a move, such as distance to work and value for the money.







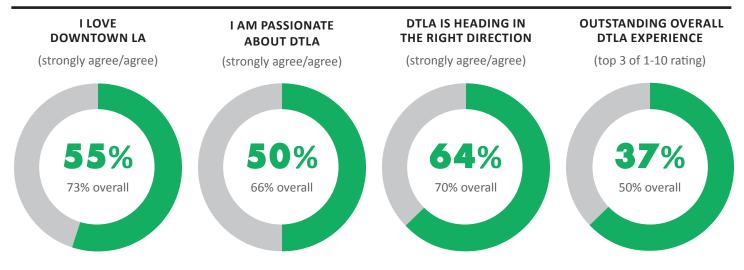


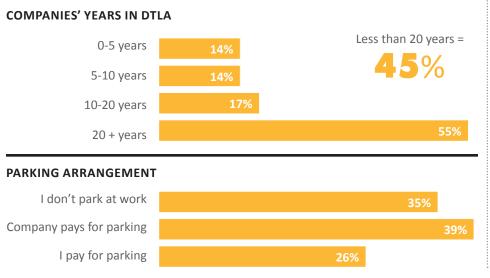


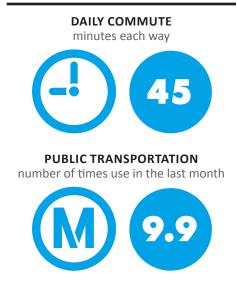


# OFFICE WORKERS

The dynamics of the Downtown workforce are evolving, with 45% working for companies that are relatively new to DTLA, 44% saying they would consider living here, and 26% using Metro as their primary commuting method.







# Percentage of age group that work for companies with less than 20 years in DTLA. 65% 56% 52% 41% 32% 7% 23-29 30-34 35-44 45-54 55-64 65+

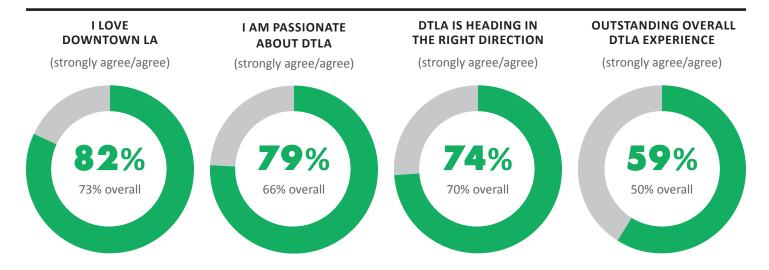


**DTLA APPEAL: WORKING** 



# **ARTS PATRONS**

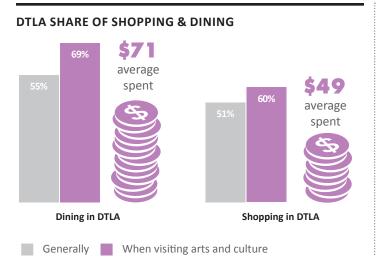
Downtowners – who live, work, or just play in DTLA – are avid consumers of culture, who regularly visit a variety of venues and spend more on shopping and dining when they do, highlighting its economic value as a premiere cultural destination.













**ARTS & CULTURE: MOST WANTED** 



KIDS	Live	Live/Work	Work	Visit
Yes	83%	91%	80%	77%
No	17	9	20	23

GENDER	Live	Live/Work	Work	Visit
Male	44%	42%	33%	36%
Female	56	57	67	63

AGE	Live	Live/Work	Work	Visit
18 - 22	1%	2%	1%	2%
23 - 29	21	20	17	15
30 - 34	21	17	12	12
35 - 44	28	28	25	22
45 - 54	17	18	18	25
55 - 64	10	11	22	18
65+	1	4	5	6

RELATIONSHIP	Live	Live/Work	Work	Visit
Married	28%	29%	41%	39%
Living together	20	17	9	11
Single, never married	44	42	37	38
Other	8	11	13	12

ETHNICITY	Live	Live/Work	Work	Visit
Caucasian (non-Hispanic)	48%	52%	44%	48%
Hispanic/Latino	19	20	24	26
Asian/Asian American	18	17	18	16
African/African American	11	9	8	8
Pacific Islander	2	2	2	2
Native American	1	1	2	2
Other group	4	2	2	2
Prefer not to answer	6	7	9	7

HOUSEHOLD INCOME	Live	Live/Work	Work	Visit
Under \$40,000	8%	9%	4%	12%
\$40,000 to \$74,999	14	18	22	24
\$75,000 to \$99,999	13	13	18	14
\$100,000 to \$149,999	25	24	21	19
\$150,000 to \$249,999	22	20	16	12
\$250,000 and over	10	9	9	5
Prefer not to answer	8	9	11	14



EMPLOYMENT STATUS	Live	Live/Work	Work	Visit
Employed full-time	75%	72%	91%	66%
Employed part-time	7	7	4	10
Self-employed	8	20	5	18
Not employed	10	0	0	6

EDUCATION	Live	Live/Work	Work	Visit
High school or equivalent	6%	8%	8%	7%
Trade school/community college	11	11	15	16
Undergraduate/four-year college	47	49	49	50
Graduate or professional degree	36	31	27	27

INDUSTRY OF EMPLOYMENT	Live	Live/Work	Work	Visit
Arts & entertainment (artist, actor, writer, production, etc.)	15%	6%	3%	13%
Architecture, design	4	6	9	2
Business/professional/technical services	15	22	21	11
Educational services, health care & social assistance	9	6	3	16
Financial services and insurance	3	9	12	4
Information media, telecom., internet & data processing	6	4	2	4
Leisure & hospitality (hotels, restaurants, bars)	4	6	4	2
Government (including military)	5	8	14	7
Medical/health services	10	4	2	9
Non-profit/civic/religious organizations	5	5	8	6
Real estate (e.g., development, brokerage)	3	7	7	5
Other	19	17	16	20

JOB TITLE	Live	Live/Work	Work	Visit
Professional or senior staff (including educators)	58%	50%	59%	43%
Clerical or general staff	6	9	19	17
Top level executive/manager	6	4	4	3
Technical/development staff	6	6	6	3
Small business owner/entrepreneur	5	11	3	10
Independent consultant, contractor or agent	3	10	3	9
Writer, artist, entertainer	6	6	6	3
Other	9	5	4	8



# **OUR SERVICES**

### **SAFE & CLEAN**

# We improve the safety, cleanliness, and quality of life in the District.

- Provide a 24/7 safety patrol & call center
- Sweep & power wash over 470 miles of sidewalk
- Remove 53,000 bags of trash each year from over 250 receptacles
- Provide dedicated outreach & connection to services for individuals experiencing homelessness

DCBID Service Center (213) 624-2425



# **MARKETING**

# We promote Downtown as a premier destination to live, work, and play.

- Host annual community events
- Promote DTLA businesses & events on DowntownLA.com
- Maintain an active social media presence
- Develop seasonal marketing campaigns

**Mike Filson** (213) 416-7524 *Director of Community Relations* 



### **ECONOMIC DEVELOPMENT**

# We help bring investment and new businesses to the area.

- Provide development consulting
- Respond to research and information requests
- Conduct housing, office, and development tours
- Produce quarterly market reports
- Create customized tours and reports

Nick Griffin (213) 416-7522 Executive Director





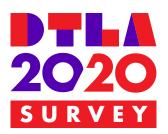
# CONTACT US

# **NICK GRIFFIN**

Executive Director (213) 416-7522 ngriffin@downtownla.com

# **ELAN SHORE**

Director of Research & Special Projects (213) 416 -7518 eshore@downtownla.com



80,000

Residential Population

500,000

Weekday Population 22 million

Annual Visitors

# I LIVE in DTLA



\$123K

**Average Household Income** 

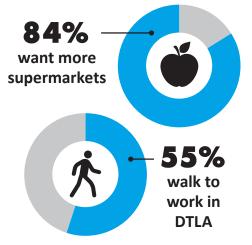


81%

Earned a BA or Higher

**54%** moved to DTLA in the past 5 years

80% are passionate about DTLA



# I WORK in DTLA



Median

Age

\$122K

**Average Household Income** 



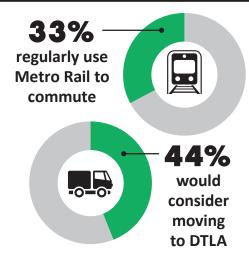


81%

Earned a BA or Higher

**63%** are top executives or professionals

79% say DTLA is a good fit for their industry





41

Median

Age

# I VISIT DTLA

**Top visited locations:** 

83% Arts District

**82%** Grand Central Market

**79%** L.A.LIVE/Staples Center



**93%** recommend DTLA as a destination\*

**\$6 billion** spent yearly in DTLA by visitors\*



\*according to Los Angeles Tourism & Convention Board

