

Downtown Austin Alliance

Late Backup

Assessments of Downtown Austin and the Downtown Austin Alliance

Biannual Tracking Survey Report

December 6, 2007

M. CRANE & ASSOCIATES, INC.

Executive Summary

The Downtown Austin Alliance has been monitoring stakeholders' views about Downtown Austin for more than a decade. In 2007, the survey of 550 stakeholders includes input from four key segments: Property Owners and Managers, Business Owners and Managers, Downtown Employees, and Nearby Residents.

In 2007, all four stakeholder groups report quite positive views about Downtown Austin. They characterize Downtown Austin as "the heart of the city," "a community," and an "exciting," "inviting," and "friendly" place. Most describe the downtown area as increasingly safe, clean, interesting, and visually appealing -- indeed most observe that Downtown Austin has continued to improve in every regard, with the notable exceptions of transportation and parking.

When stakeholders describe the strengths of Downtown Austin in their own words, intangible qualities are referenced most often: the atmosphere or energy, the many happenings (festivals, cultural events, community gatherings), and the growth. When describing the weaknesses or shortcomings in their own words, parking and transportation challenges surface most often. Other common concerns are the integrity of the natural environment and, for the first time, the ability to retain Austin's distinctive character.

Executive Summary

With respect to the DAA, in particular, Property Owners and Managers, Business Owners and Managers, and Downtown Employees **continue to evaluate the DAA's programs and communications -- including the TV series "DOWNTOWN" -- quite favorably**. Though views about downtown (and the quality of DAA communications) are positive, the findings reveal that it is becoming increasingly difficult for DAA's communications to achieve desired levels of penetration.

Going forward, stakeholders would like to see the DAA continue to pursue the full range of issues and activities it has in the past. In all, the results indicate that, in 2008 it will be especially important for the DAA to

- Continue to seek solutions to traffic problems
- Continue to address concerns about availability and affordability of parking
- Continue to focus on downtown beautification, including attention to parks, green spaces, and historic spaces
- Consider how to safeguard the Downtown Austin brand (it's quite favorable now, but some new concerns are beginning to surface)
- Increase penetration of DAA communications with stakeholders

Research Objectives

This research will be used by the DAA:

- To monitor key stakeholders' perceptions of **Downtown Austin**, including:
 - » Perceived strengths
 - » Perceived weaknesses
 - » Recommended changes
- To monitor awareness of **the DAA** and its programs and communications, and to assess overall effectiveness.
- To identify important trends and **changes over time**
- To inform the DAA's **priorities and new directions for the future.**

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Research Methodology

- Surveys monitoring perceptions of Downtown Austin and the DAA among Property Owners and Managers, Business Owners and Managers, and Downtown Employees were conducted biannually between 1995 and 2005. In 2005, another key stakeholder group, Nearby Residents, was added. All four of these groups are included in the 2007 Tracking Survey.
- In 2007, 550 telephone interviews were conducted between August 1 and August 9 with these four stakeholder groups.

Stakeholder Group	Completed Interviews
Downtown Property Owners and Managers (Prop O&Ms)	100
Downtown Business Owners and Managers (Bus O&Ms)	100
Downtown Employees (Emps)	100
Other Downtown Nearby Residents (NBRs)	250
Total	550

- These interviews averaged 22 minutes in length for Prop and Bus O&Ms and 16 minutes in length for Emps and NBRs.
- Sample lists for Prop O&Ms and Bus O&Ms were provided by the DAA. Emps and NBRs were identified by using a Random Digit Dial (RDD) method of sampling households in nearby zip codes (78701, 78702, 78703, 78704, 78705, 78721, 78722, 78723, 78731, 78741, 78746, 78751, 78756, 78757).

Respondent Profiles by Group

		Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs* n=350
Gender	Male	53%	44%	43%	40%
	Female	47%	56%	57%	60%
Age	<35 years	28%	34%	41%	35%
	35-55 years	50%	39%	38%	43%
	>55 years	22%	27%	20%	22%
Years own property / business / work in Downtown Austin	<4 years	19%	17%	17%	N/A
	4-5 years	22%	16%	18%	
	6-10 years	24%	28%	38%	
	>10 years	35%	39%	27%	
Commute <16 Minutes to Downtown		71%	78%	95%	99%

Note The NBR category is comprised of 100 respondents who live nearby and work Downtown (and are described separately as Emps) and 250 respondents who live nearby but do not work Downtown

Gender Interviewer observation

Age What category best describes your age? Are you <under 25, 25 to 35, 36 to 45, 46 to 55, 56 to 65, over 65>?

Years in Downtown How many years have you <owned or managed a business in / worked in / or lived near> Downtown Austin?

Travel Time On average, how long does it take you to get from your home to Downtown Austin during the work week?

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Business O&Ms by Type

Business Owners and Managers were asked to classify their business into one of several categories *

Type of Business	Bus O&Ms n=100
Retail	35%
Professional Services	35%
Food and Beverage	18%
Arts or Entertainment	6%
Other	6%

*This measure is new to the 2007 survey

Which of these categories best describes your business?

Outline of Key Findings

I. Perceptions of Austin's Downtown Area

- » Overall Evaluation of Downtown
- » Perceived Changes to Downtown
- » Image of Downtown
- » Strengths of Downtown
- » Weaknesses of Downtown

II. Usage Patterns

III. Perceptions of the DAA

III. Summary and Recommendations

Overall Evaluation of Downtown

VERY FAVORABLE

All four groups evaluate Downtown Austin favorably on every dimension measured. The ratings are remarkably consistent across all four segments.

QUITE CONSISTENT

There is very little variation in the evaluation of downtown, across all four segments and all measures. In 2007, the basic characteristics of Downtown Austin were rated just as favorably as they were in 2005.

Overall Evaluation of Downtown

	2005	2007			
	Overall Mean*	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=350
Commute to downtown	8 8	8 7	8 9	8 9	8 8
Safety during the day	8 7	8 7	8 7	8 7	8 7
Interesting places and things	8 4	8 4	8 1	8 4	8 4
Getting around downtown	8 3	8 4	8 2	8 3	8 2
Cleanliness of streets and buildings	8 4	8 2	8 5	8 1	8 3
Visual appeal	8 1	8 2	8 0	8 2	8 1
Desirable place to shop	8 0	7 9	8 2	7 9	8 1
Desirable place to work	7 9	7 8	8 2	7 8	7 8
Safety during the night	7 6	7 8	7 6	7 4	7 5
Desirable place to live	7 6	7 4	8 2	7 6	7 6

*Based on all four stakeholder groups (Prop O&Ms, Bus O&Ms, Emps, and NBRs) combined Data from 2005 Report

Using a 10 point scale where 1 is "poor" and 10 is "excellent" How would you evaluate the downtown area in terms of <the cleanliness of streets and buildings, being safe during daytime hours, being a desirable place to live, being safe during nighttime hours, the availability of interesting places to go and things to do, being visually appealing, being a desirable place to shop, being a desirable place to work, acceptability of your commute to downtown, ease of getting around within the downtown area>?

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Perceived Changes to Downtown

For the most part, stakeholders think downtown is “getting better all the time.”

- Generally, 85% of all four segments believe the downtown area today is either “better” than or “the same” as it was 3 years ago, in terms of nearly every dimension that was measured.
- The exception is transportation. Most do not believe that the acceptability of their commute to downtown has improved. Likewise, most do not believe that the ease of getting around within the downtown area has improved.

Evaluation of Downtown Compared to 3 Years Ago

		2005*		2007							
		All Groups		Prop O&Ms n=100		Bus O&Ms n=100		Emps n=100		NBRs n=350	
		% Better	% Worse	% Better	% Worse	% Better	% Worse	% Better	% Worse	% Better	% Worse
Notably Better	Interesting places and things	64%	9%	74%	8%	66%	10%	56%	5%	61%	9%
	Safety during the day	64%	7%	58%	6%	67%	4%	57%	14%	63%	8%
	Desirable place to shop	64%	11%	63%	10%	58%	9%	64%	15%	63%	11%
	Desirable place to live	64%	10%	63%	11%	64%	8%	61%	7%	60%	10%
	Visual appeal	62%	8%	67%	3%	62%	12%	55%	13%	60%	10%
	Cleanliness of streets and buildings	60%	10%	60%	10%	66%	5%	54%	11%	56%	10%
	Safety during the night	59%	9%	57%	5%	60%	12%	55%	12%	55%	11%
	Desirable place to work	52%	6%	39%	10%	53%	5%	61%	5%	55%	5%
Not Better	Getting around downtown	40%	15%	42%	10%	37%	19%	40%	14%	39%	17%
	Commute to downtown	23%	15%	24%	17%	22%	15%	21%	14%	23%	15%

*Data from 2005 Report

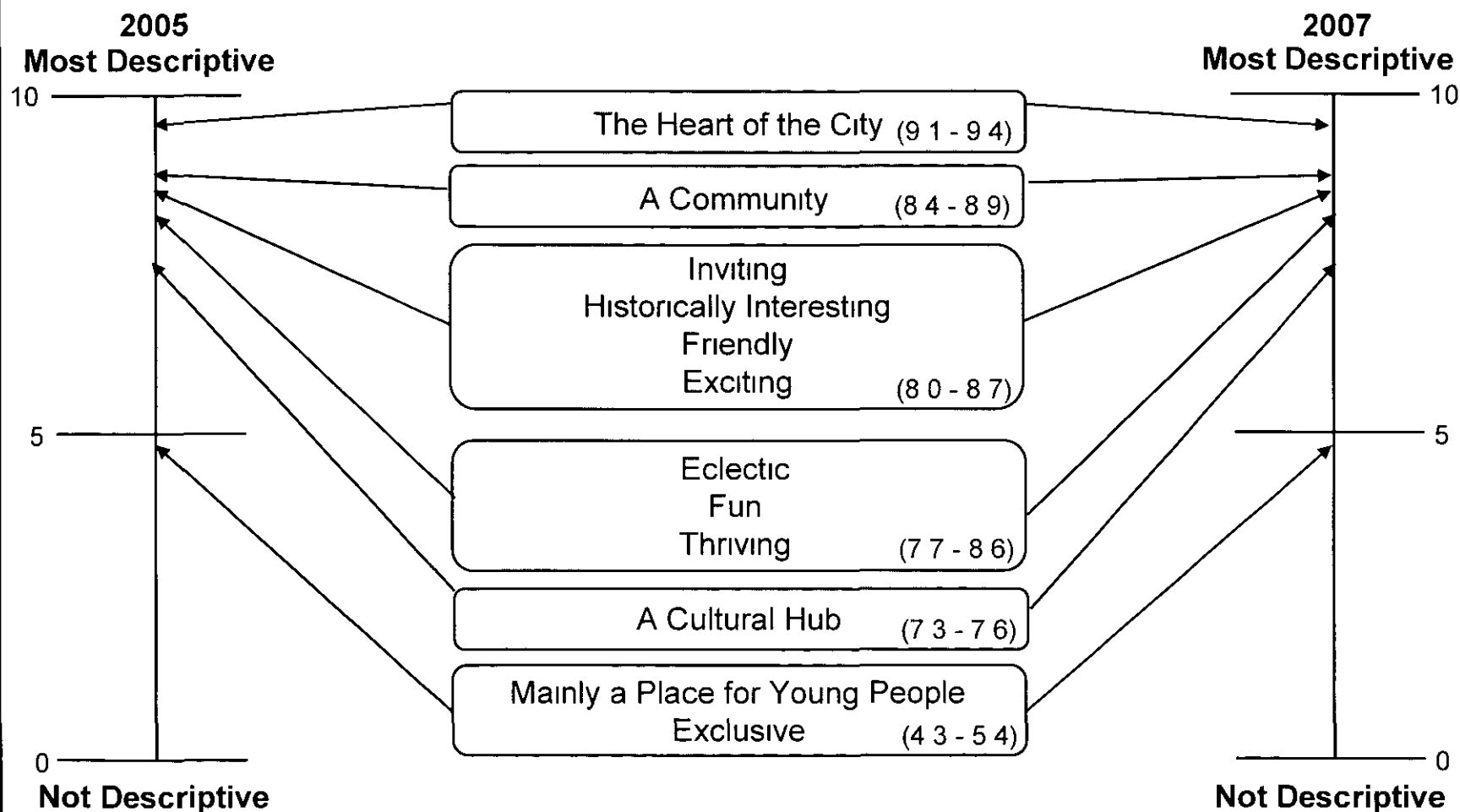
Compared to 3 years ago do you think the downtown area today is better, about the same, or worse in terms of <the cleanliness of streets and buildings, being safe during daytime hours, being a desirable place to live, being safe during nighttime hours, the availability of interesting places to go and things to do, being visually appealing, being a desirable place to shop, being a desirable place to work, acceptability of your commute to downtown, ease of getting around within the downtown area>?

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Image of Downtown

- There is widespread agreement that Downtown Austin is “the heart of the city,” “a community,” “exciting,” “inviting,” “friendly,” and “historically interesting.”
- Stakeholders’ current perceptions of Downtown Austin are closely aligned with the image that the DAA seeks to establish.
- The current image of downtown is nearly unchanged since 2005 — almost all descriptors were rated exactly the same in 2007. There are no differences among the four stakeholder groups.

Image of Downtown



*Based on all four stakeholder groups (Prop O&Ms, Bus O&Ms, Emps, and NBRs) combined

*I am going to read some terms to you and I would like to know how much you think these terms accurately describe Downtown Austin
Using a scale from 1 to 10 where 1 means "does not fit at all" and 10 means "fits very well," please indicate how well each term fits
Downtown Austin*

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Image of Downtown

	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=350
The Heart of the City	9 1	9 3	9 4	9 3
A Community	8 4	8 9	8 8	8 7
Historically Interesting	8 3	8 7	8 4	8 4
Inviting	8 6	8 4	8 4	8 4
Friendly	8 4	8 3	8 5	8 4
Exciting	8 1	8 5	8 0	8 3
Eclectic	8 3	7 8	7 7	7 9
Fun	7 7	8 6	7 9	7 9
Thriving	8 1	7 9	7 8	7 9
A Cultural Hub	7 3	7 5	7 6	7 5
Mainly a Place for Young People	5 2	4 6	5 2	5 0
Exclusive	5 4	4 6	4 3	4 5

I am going to read some terms to you and I would like to know how much you think these terms accurately describe Downtown Austin. Using a scale from 1 to 10 where 1 means "does not fit at all" and 10 means "fits very well," please indicate how well each term fits Downtown Austin.

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3 Predominant Strengths of Downtown

Respondents identify a great variety of strengths of Downtown Austin.

- There is synergy among the 3 strengths of downtown most commonly mentioned
 - » **The Atmosphere*** Energy / People / Attitude / History
 - » **Cultural Attractions and Events** Festivals / Museums / Art Exhibits / Music / Entertainment
 - » **Growth and Development** Positive Changes / Tourism / New Businesses / Residential Growth
- Other strengths stakeholders recognize (somewhat less commonly) are
 - » Specific Attractions and Destinations, such as the Capitol and other Historical Landmarks
 - » Parks and Recreation
 - » Safety
 - » Restaurants

*Note Also widely mentioned strengths in 2005

What do you consider to be the most important strengths of the downtown area?

3 Predominant Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
THE ATMOSPHERE: Energy / People / Attitude / History	<p>"I love the atmosphere " N</p> <p>"Downtown has a great atmosphere " N</p> <p>"Austin's history and the historical sites " E</p> <p>"Still has some of that quirkiness about it " N</p> <p>"The charming qualities of the downtown area " B</p> <p>"Fun places to hang out " N</p> <p>"Friendly locals " N</p> <p>"The Austinites' attitude " N</p> <p>"You can work, live, and play there " P</p> <p>"The eclectic mix of areas and people " P</p> <p>"There is something for everyone " N</p> <p>"Good place to kick back and relax " B</p> <p>"The natural vibe to it -- you know, there's just more nature here than in most downtown areas " B</p> <p>"The people that have chosen to work and play here " P</p> <p>"It's still pretty laid-back culturally " B</p> <p>"Historical sites and landmarks " N</p> <p>"Fun place to party at " B</p> <p>"I feel safe in downtown, unlike in most cities " B</p> <p>"Older buildings being restored " N</p> <p>"It's just awesome " E</p>

P = Prop O&M B = Bus O&M E = Emp N = NBR

What do you consider to be the most important strengths of the downtown area?

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3 Predominant Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
CULTURAL ATTRACTIONS AND EVENTS: Festivals / Museums / Art Exhibits / Music / Entertainment /	<i>"Lots of culture " B</i> <i>"They seem to have more festivals now " E</i> <i>"Lots of good places to entertain yourself " B</i> <i>"You can entertain guests downtown " P</i> <i>"Good place to take your family " B</i> <i>"Great things to do and see for adults and children " N</i> <i>"Street performers and artisans " E</i> <i>"Art shows " N</i> <i>"Free music " P, N</i> <i>"The museums and educational sites " N</i> <i>"All of the wonderful cultural things you can do " E</i> <i>"Events like SXSW and others " N</i> <i>"Different cultural things to do " N</i> <i>"Arts and entertainment continue to be a big draw for the city " B</i> <i>"They go all out at Christmas " B</i>

P = Prop O&M B = Bus O&M E = Emp N = NBR

What do you consider to be the most important strengths of the downtown area?

3 Predominant Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
"THE GROWTH": Positive Changes / Tourism / New Businesses / Residential Growth	<i>"The building of downtown " N</i> <i>"The growth that has occurred downtown " N</i> <i>"Downtown is now <u>the</u> place to work and live " N</i> <i>"There have been many new businesses move downtown " B</i> <i>"Growth explosion of people moving downtown " N</i> <i>"Lots of people moving in " N</i> <i>"The city has come a long way to making this a first class city " N</i> <i>"The city manages to balance the parks and recreation with the growing need of the city " N</i> <i>"The city planners that we have in place are doing a great job " B</i> <i>"Growing while still keeping that college town feel " B</i> <i>"They make a conscious effort to inform the public about projects and other events downtown " N</i>

P = Prop O&M B = Bus O&M E = Emp N = NBR

What do you consider to be the most important strengths of the downtown area?

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5 Weaknesses of Downtown

- The weaknesses of Downtown Austin most commonly mentioned are:
 - » **Inadequate Parking****
 - » **Traffic / Transportation***
 - » **Growth** Too Much / Too Fast, Overcrowding, Construction
 - » **Natural Environment***. Park Maintenance, Neglected Green Spaces, Lack of Cleanliness, Pollution
 - » **Atmosphere** Inadequate Preservation / Improvement of Historic and Cultural Sites, Erosion of Distinctive Character
- Another weakness stakeholders recognize (less commonly) is:
 - » Need for More Shopping

*Note Also widely mentioned weaknesses in 2005

**Longstanding weakness

What do you consider to be the most important weaknesses or shortcomings of the downtown area?

5 Weaknesses of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
INADEQUATE PARKING	<i>"Parking is bad " N</i> <i>"Not enough parking to keep up with growth " P</i> <i>"Businesses need help with the parking situation " P</i> <i>"They need to build many more parking garages in downtown " B, N</i> <i>"Too many tourists, not enough parking " B</i> <i>"Parking has improved, but it's still a problem " P</i> <i>"Parking is horrendous " E</i> <i>"With all the people moving downtown, there isn't enough parking for the businesses " N</i>
TRAFFIC / TRANSPORTATION	<i>"Traffic in the downtown area is awful " P</i> <i>"Traffic is the worst problem " E</i> <i>"Flow into and out of downtown isn't efficient " P</i> <i>"Need more city bus routes " E</i> <i>"Improve the public transportation system " N</i> <i>"Too much traffic " N</i> <i>"Daytime traffic is a drag " B</i> <i>"[Need a] mass transit system -- like a train or more busses " P, N</i> <i>"Construction sites are creating worse traffic problems " N</i>

P = Prop O&M B = Bus O&M E = Emp N = NBR

What do you consider to be the most important weaknesses or shortcomings of the downtown area?

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5 Weaknesses of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
GROWTH: Too Much / Too Fast; Overcrowding, Construction	<i>"Trying to grow too quickly " N</i> <i>"More high rise buildings " E</i> <i>"Population boom " N</i> <i>"Too many people downtown " B</i> <i>"Too many people, not enough room " N</i> <i>"Too many of these condos and high end apartments " N</i> <i>"All of these large corporations moving to downtown " B</i> <i>"Need to slow the growth to catch up " E</i> <i>"The overcrowding " N</i> <i>"They are trying to do too much at one time " N</i> <i>"All the construction projects going on at once " P</i> <i>"Heavy construction during the day " P</i> <i>"Lower the noise pollution during work hours " P</i> <i>"Downtown is becoming too overpopulated " N</i>

P = Prop O&M B = Bus O&M E = Emp N = NBR

What do you consider to be the most important weaknesses or shortcomings of the downtown area?

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5 Weaknesses of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
NATURAL ENVIRONMENT: Park Maintenance / Neglected Green Space / Lack of Cleanliness / Pollution	<p><i>"More attention needs to be paid to the environment " N</i></p> <p><i>"Parks are being neglected " B, E</i></p> <p><i>"Clean up the city " P, N</i></p> <p><i>"Need more parks and recreational areas " P</i></p> <p><i>"More trees and landscaping need to be added " N</i></p> <p><i>"Starting to see pollution, especially during the summer time " N</i></p> <p><i>"Air pollution has gotten worse " B</i></p> <p><i>"Lots of trash and litter around my building " N</i></p>
ATMOSPHERE: Inadequate Preservation / Improvement of Historic and Cultural Sites / Erosion of Distinctive Character	<p><i>"The downtown area has become too corporate " B</i></p> <p><i>"Downtown has become too touristy " B</i></p> <p><i>"Too crowded downtown now " E</i></p> <p><i>"The corporate takeover of downtown " N</i></p> <p><i>"Historic buildings need help " B</i></p> <p><i>"The city should put more emphasis on the arts and building an arts district, or at least adding to the current one " N</i></p> <p><i>"We sometimes forget about the historical value of the city " P</i></p> <p><i>"Getting too corporate for my liking " P</i></p> <p><i>"Downtown isn't as unique as it once was " N</i></p> <p><i>"People aren't as friendly as they used to be " E</i></p>

P = Prop O&M B = Bus O&M E = Emp N = NBR

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Outline of Key Findings

- I. Perceptions of Austin's Downtown Area
- II. **Usage Patterns**
 - » Sources of Information
 - » Patronage
 - » Transportation
- III. Perceptions of the DAA
- IV. Summary and Recommendations

Primary Sources of Information About Downtown*

Source	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=350
Statesman (Print)	35%	32%	41%	44%
Statesman (Online)	18%	19%	20%	18%
DAA Website	16%	15%	15%	11%
Chronicle (Print)	12%	11%	13%	12%
Austin360.com	4%	18%	14%	11%

Note Columns may not sum to 100% as measure includes multiple mentions

*This measure is new to the 2007 survey

- The majority of respondents (roughly 50% - 60%) relies on the printed and online *Austin American-Statesman* as their primary source of information about downtown.
- The DAA website is used about as widely as some other websites to obtain information about downtown

What sources do you rely on most often to get information of interest to you about downtown? What else?

Patronage of Downtown Austin

- Between 2005 and 2007, reported patronage of downtown businesses both during and outside of business hours has remained the same.

Mean Number of Days / Week				
	2005	2007		
	Overall*	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100
During Business Hours	2 8	2 9	2 8	2 9
Outside Business Hours	2 6	2 2	2 7	2 8

*Based on all three stakeholder groups combined (Prop O&Ms, Bus O&Ms, and Emps) Data from 2005 Report

First, think about your typical work week. On average, how many days in a week do you patronize a downtown business such as a restaurant, a store, or any business other than your own workplace within your typical business hours? Now think about your week outside of your typical business hours. On average, how many days in a week do you patronize a downtown business such as a restaurant, a store, or any business other than your own workplace outside of your typical business hours?

Nearby Resident Patronage of Downtown Austin

- Those who do not work downtown but live nearby also patronize downtown businesses regularly
- On average, non-employee Nearby Residents report that they patronize downtown businesses
 - » just over one-third of weekdays during business hours ($7.8 / 21 = 37\%$)
 - » nearly one-third of weeknights ($6.1 / 21 = 30\%$)
 - » just over one-third of weekends (days and nights) ($3.1 / 8 = 39\%$)
- This is essentially the same as 2005

Mean Number of Days/Month*	
	NBRs n=250
During Business Hours	7.8
Weeknight	6.1
Weekend	3.1

*Monthly patronage is based on an average of 21 weekdays per month and 8 weekend days per month

Note The 2000 U S Census estimates the total population of Nearby Residents at 186,144

Think about your pattern during weekday business hours. On average, how many times a month do you patronize a downtown business such as a restaurant, a store, or any business during the work week, in the daytime? Thinking about week nights, on average, how many times a month do you patronize a downtown business such as a restaurant, a store, or any business during the work week, but at night? Thinking about weekends, on average, how many times a month do you patronize a downtown business such as a restaurant, a store, or any business during the weekend?

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Patronage of East 6th Street*

- In 2007, respondents were asked to gauge the frequency with which they patronize businesses on East 6th Street, as well as how much more likely they would be to patronize this area with the addition of four types of new businesses
 - » Restaurants
 - » Retail Businesses
 - » Music Venues
 - » Entertainment Businesses
 - The majority of each stakeholder group (roughly two-thirds) has patronized East 6th Street within the last year (data not shown)
 - All four types of new business would increase the patronage of all stakeholder groups
 - Restaurants hold the most appeal (more than two-thirds of each group said “much more likely” for new restaurants), but new retail and entertainment offerings would increase patronage as well
- *This measure is from the 2007 survey

Patronage of East 6th Street*

Likelihood of Increased Patronage with New Businesses

	Percentage "Much" or "Somewhat" More Likely			
	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=350
Restaurants	87%	89%	87%	98%
Entertainment Businesses	78%	81%	85%	79%
Retail Businesses	74%	79%	78%	82%
Music Venues	48%	48%	48%	53%

*This measure is new to the 2007 survey

How likely would you be to increase your patronage of 6th Street if there were new <retail businesses/restaurants/music venues/entertainment businesses> that appeal to you?

Transportation To & Within Downtown

- The vast majority of stakeholders drive their own vehicles to the downtown area
- Within downtown, most drive or walk, a small percentage (8% - 19%) use public transportation
- Most Nearby Residents (70%) who visit but do not work downtown drive their cars to get around the downtown area (data not shown here)
- Transportation patterns are nearly unchanged since 2005

		Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100
Downtown Commute	Own Vehicle	67%	72%	76%
	Car Pool	17%	15%	12%
	Public	11%	7%	4%
	Walk / Bike	5%	6%	6%
Within Downtown	Own Vehicle	41%	44%	46%
	Public	8%	19%	7%
	Walk	47%	40%	38%

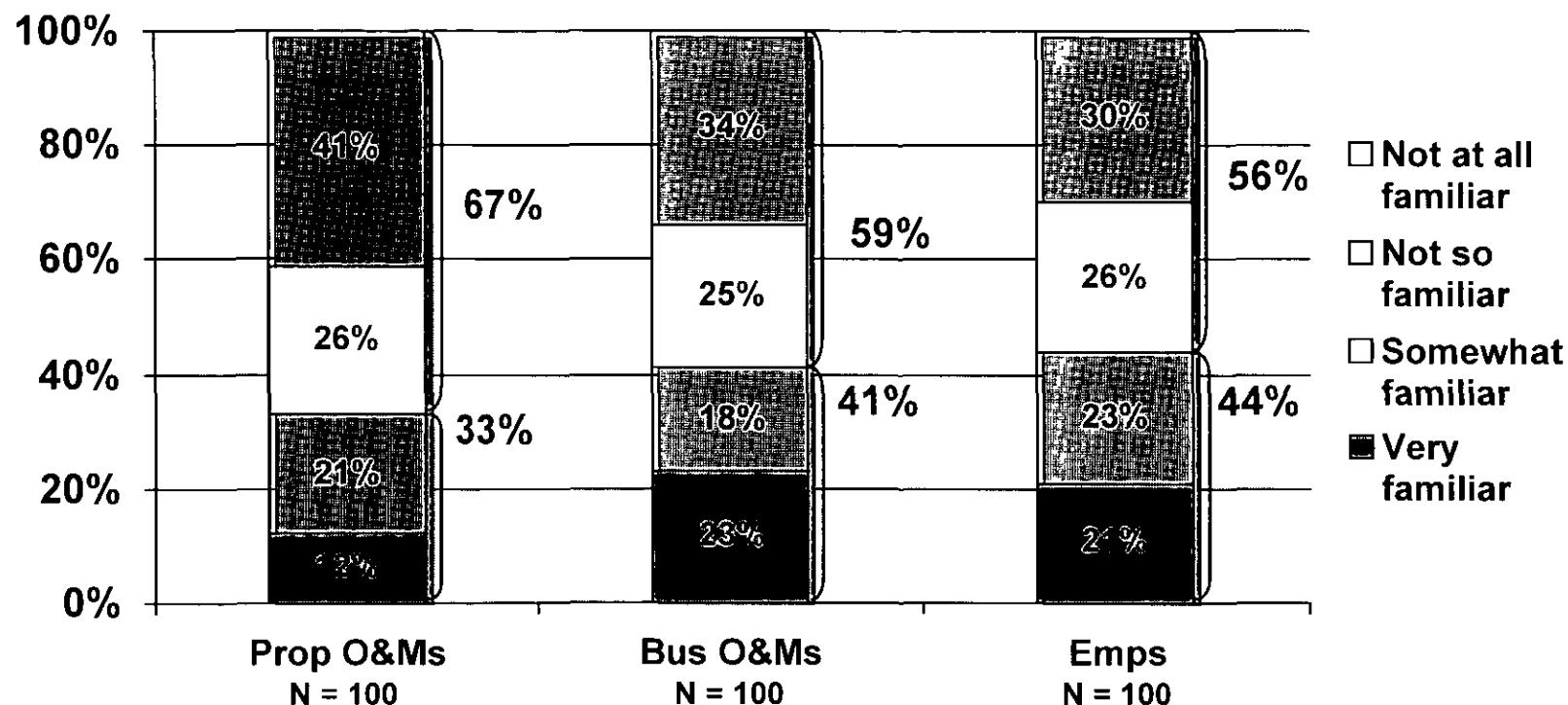
Note Columns may not sum to 100% as some say "it depends"

How do you typically commute to and from downtown? Do you <drive your own vehicle, car pool or van pool, take public transportation such as the bus or the Dillo, or do you walk or ride a bicycle>?

How do you typically get around downtown? Do you <drive your own vehicle, take public transportation such as the bus or the Dillo, or do you walk or ride a bicycle>?

Transportation To & Within Downtown

Familiarity With The Dillo*

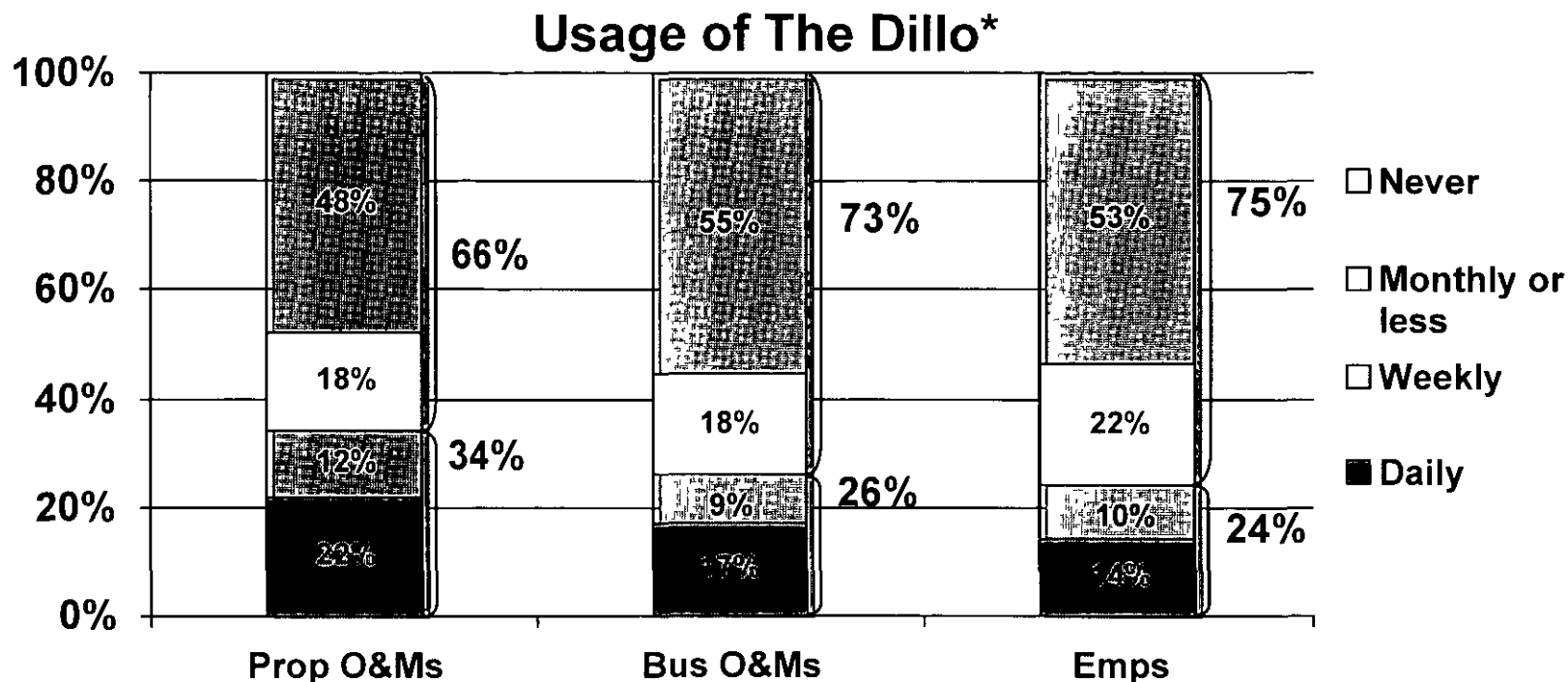


- Roughly two-thirds of each group have very little familiarity with the Dillo

* This measure is new to the 2007 survey

Familiarity How familiar are you with the Dillo in terms of its routes and schedule?

Transportation To & Within Downtown



- One quarter to one-third of each group report using the Dillo at least once a week
- Most never use it
- Reasons are low familiarity, "high cost" (it's free), or "no need" ("I have a car")

*This measure is new to the 2007 survey

Usage During the last year, would you say you have used the Dillo <almost daily/at least once a week/about once a month/a few times/not at all>

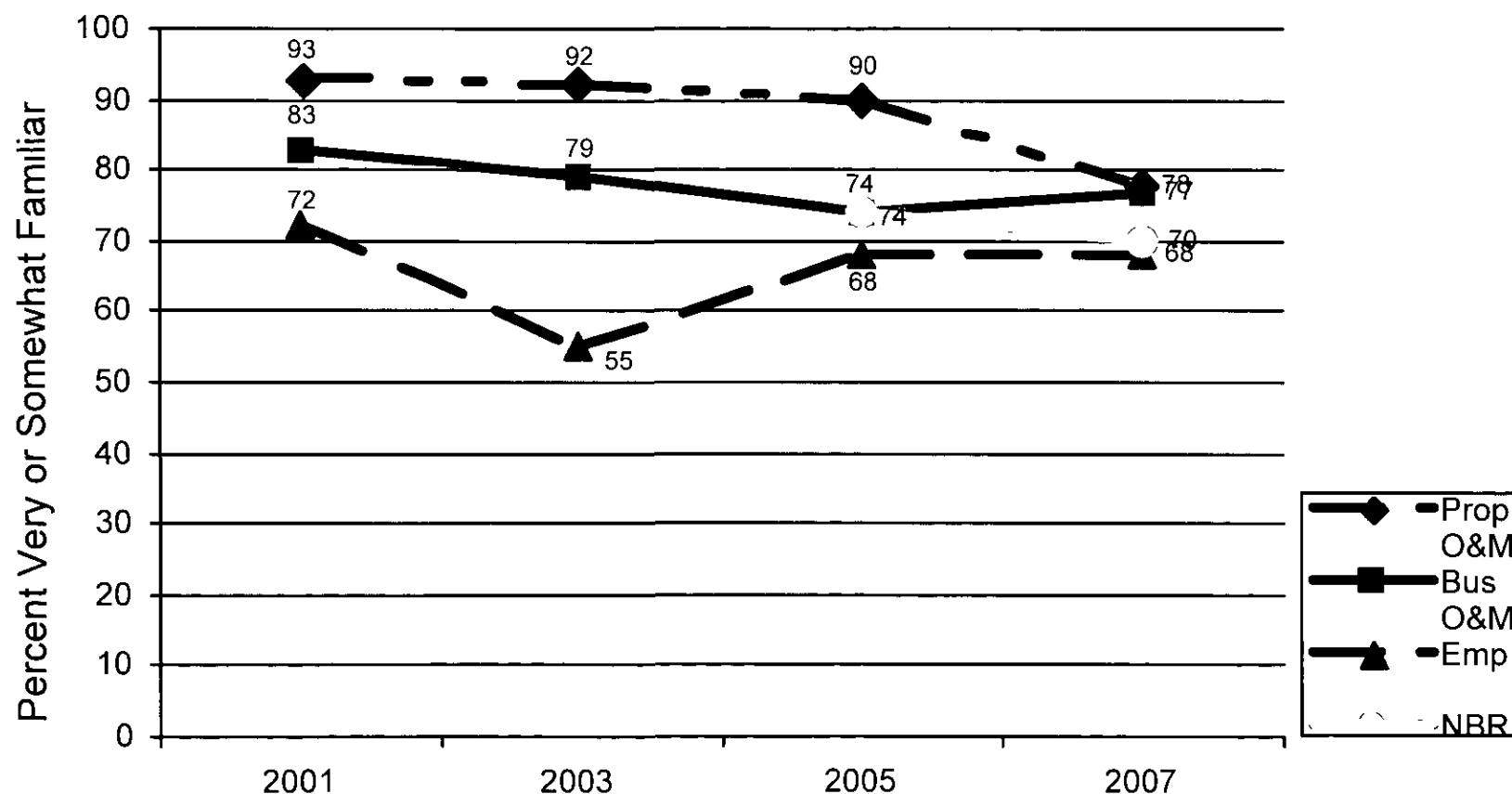
Outline of Key Findings

- I. Perceptions of Austin's Downtown Area
- II. Usage Patterns
- III. Perceptions of the DAA**
 - » Familiarity with the DAA
 - » Awareness of DAA Programs and Communications
 - » Overall Evaluation of the DAA
 - » Importance of DAA Activities Going Forward
 - » Stakeholders' Suggestions for DAA
- IV. Summary and Recommendations

Familiarity with the DAA

- Roughly three-quarters of Prop O&Ms and Bus O&Ms are familiar with the DAA—this is a decline in familiarity among Prop O&Ms (from 90% in 2005).
- Roughly 70% of Employees and NBRs are familiar with the DAA.

Familiarity (Very or Somewhat) with the DAA



How familiar are you with the DAA (or the Downtown Austin Alliance)? Would you say you are very familiar, somewhat familiar, not so familiar, or not at all familiar with it?

Awareness of DAA Programs

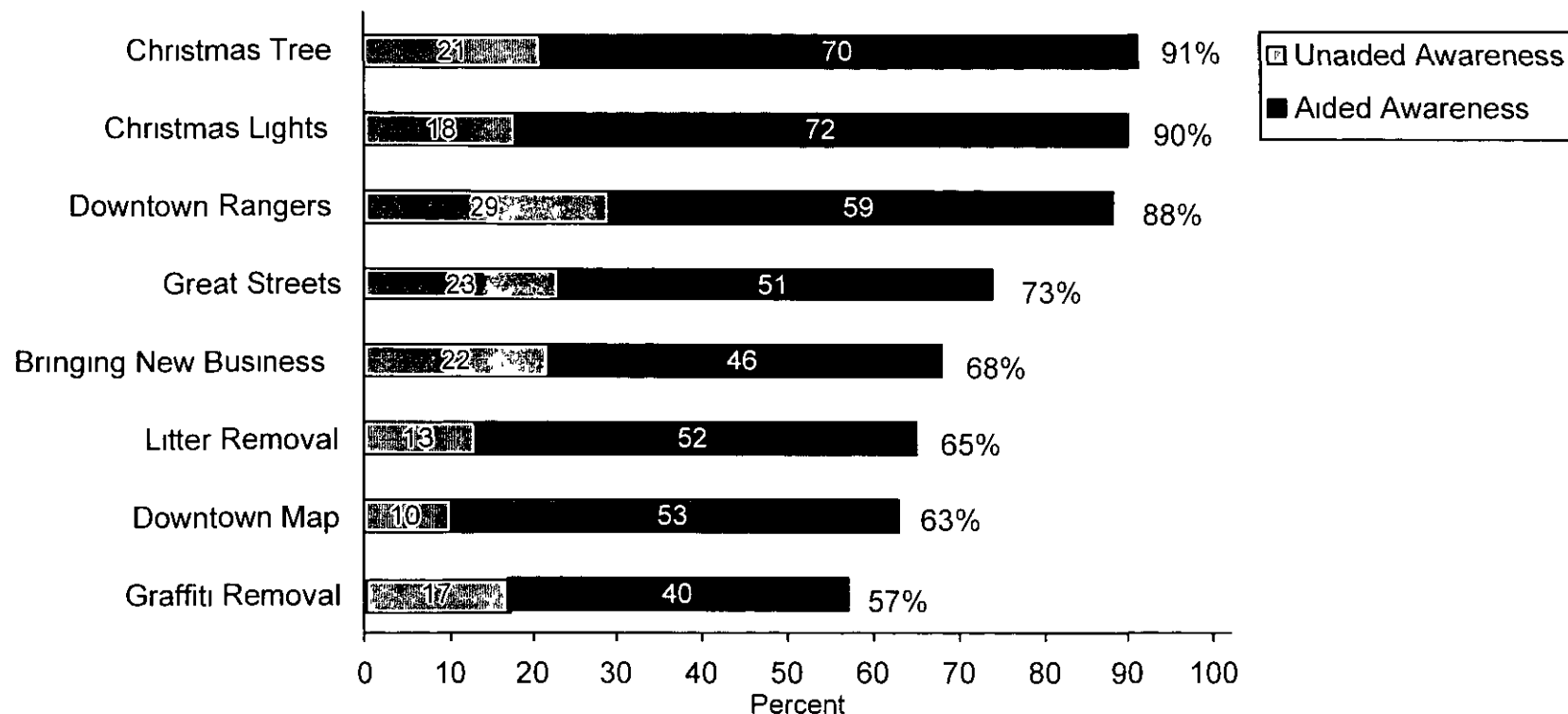
- Stakeholders' awareness of DAA programs is holding steady at moderate to high levels, and is nearly unchanged since 2005.
- The most well-known DAA programs are*:
 - With highest unaided awareness:
 - » Austin Downtown Rangers
 - With highest total awareness.
 - » Christmas Tree and / or Lighting Ceremony at the Capital
 - » Christmas Lights / Decorations along Congress Avenue
 - » Austin Downtown Rangers
- Roughly two-thirds to three-quarters are aware of the remaining programs.

*Not all realize that these activities are sponsored by the DAA.

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Awareness of DAA Programs

Combines All Segments



- Awareness levels of DAA programs have decreased slightly since 2005 (between 1% and 4%)
- Respondents who indicate awareness of the existence of these offerings may be unaware that they are sponsored by the DAA

Which activities of the DAA have you heard about? Any others? Are you aware of the following activities of the DAA <the Downtown Austin Map, The Great Streets Program to improve sidewalks and plantings, The Austin Downtown Rangers, the friendly patrol, The Litter Removal Program, The Graffiti Removal Program, Holiday Sing Along and Tree Lighting Event at the Capitol, Holiday Lighting along Congress Avenue>?

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Awareness of DAA Communications

Across the board, DAA Communications are evaluated favorably, though penetration is somewhat challenging.

PRINT	<i>Downtown Focus</i> is evaluated favorably. It has good penetration among Prop O&Ms (64%) and Bus O&Ms (81%).
ELECTRONIC	Those who read the weekly email <i>This Week</i> find it very useful. Note, however, that almost two-thirds of Prop O&Ms and Bus O&Ms and 80% of Emps indicate that they do not receive it. Roughly one quarter of each group uses the website. Users find it very useful.
EVENTS	Attendance at events is variable. Across the board, attendees consider them very useful.
TV	The percentage of stakeholders who are aware of and have seen the TV show "DOWNTOWN" has nearly doubled since the show first aired in 2005.

Awareness of DAA Communications

Type	Specific Tool	Prop O&Ms n=100			Bus O&Ms n=100			Emps n=100			NBRs n=350	
		Receive	Read / Use / Attend	Value*	Receive	Read / Use / Attend	Value*	Receive	Read / Use / Attend	Value*	Read / Use / Attend	Value*
Print	Downtown Focus	64%	79%	7.5	81%	87%	8.0	27%	54%	8.0	NA	
	Weekly Email "This Week"	35%	88%	8.8	38%	81%	8.3	21%	75%	8.3	NA	
Electronic	Website	NA	20%	9.2	NA	22%	8.4	NA	29%	8.1	26%	8.2
	Issues & Eggs Series	NA	62%	8.9	NA	66%	9.0	NA	57%	9.1	NA	
	Luncheon & Speaker Series		43%	9.0		55%	9.0		38%	8.6%		

*Based on small ns – only those who read, use, or attend

Read = % usually read some or all of it

Attend & Use = % regularly or sometimes use/attend

The DAA <distributes a weekly newsletter by e-mail called This Week in Downtown that includes street closures, downtown events, and other information, publishes a printed newsletter called "Downtown Focus" which is sent by mail> Do you receive it on a regular basis? Do you usually read <all of it, some of it, or little or none of it>?

The DAA sponsors <a series of programs called the Luncheon & Speaker Series, the monthly breakfast called Issues & Eggs> Do you attend it <regularly, sometimes, or seldom or not at all>?

On a scale from 1 to 10, where 1 means "not at all useful" and 10 means "very useful," please rate how useful <the email newsletter This Week in Downtown, the printed newsletter "Downtown Focus", the Luncheon & Speaker Series, the monthly breakfast Issues & Eggs> is to you

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DAA Communications with Stakeholders

- Nearly one-third of Prop O&Ms and Bus O&Ms think they do not receive enough information from the DAA, indicating no change from 2005
- A substantially larger portion of Emps (61%) think they do not receive enough information from the DAA

		Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100
Amount of Communication	Right	62%	60%	32%
	Too Much	8%	9%	7%
	Too Little	30%	29%	61%

- Bus O&Ms report that the most effective way for the DAA to communicate with them is through electronic channels such as a blog / bulletin board or monthly webinar *

*Data not shown here This measure is new to the 2007 survey

We'd like to know your opinions about the amount of information you receive from the DAA Would you say you receive <too little information from the DAA, right amount of information from the DAA, or too much information from the DAA>?

DAA Communications

Information Desired on DAA Website*

	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=350
Parking Information	25%	36%	21%	23%
Information About Transportation Around Downtown	5%	9%	25%	27%
Directory of Businesses	NA	23%	25%	23%
Directory of Restaurants	25%	14%	29%	23%
Special Downtown Events	20%	14%	36%	23%

Note Columns may not sum to 100% as measure includes multiple mentions

*This measure is new to the 2007 survey

What kind of information would you like to find on the DAA's website? What else?

DAA Communications

TV Show "DOWNTOWN"

- Between half and two-thirds of each stakeholder group is aware of "DOWNTOWN."
- Approximately one-third of stakeholders has seen it (up from 15% - 20% in 2005).
- Most Nearby Residents who have seen the show say it has increased their interest in Downtown Austin, and almost all (90%) say the show has increased the likelihood that they will patronize downtown businesses.

DAA Communications

How Stakeholders Become Aware of "DOWNTOWN"

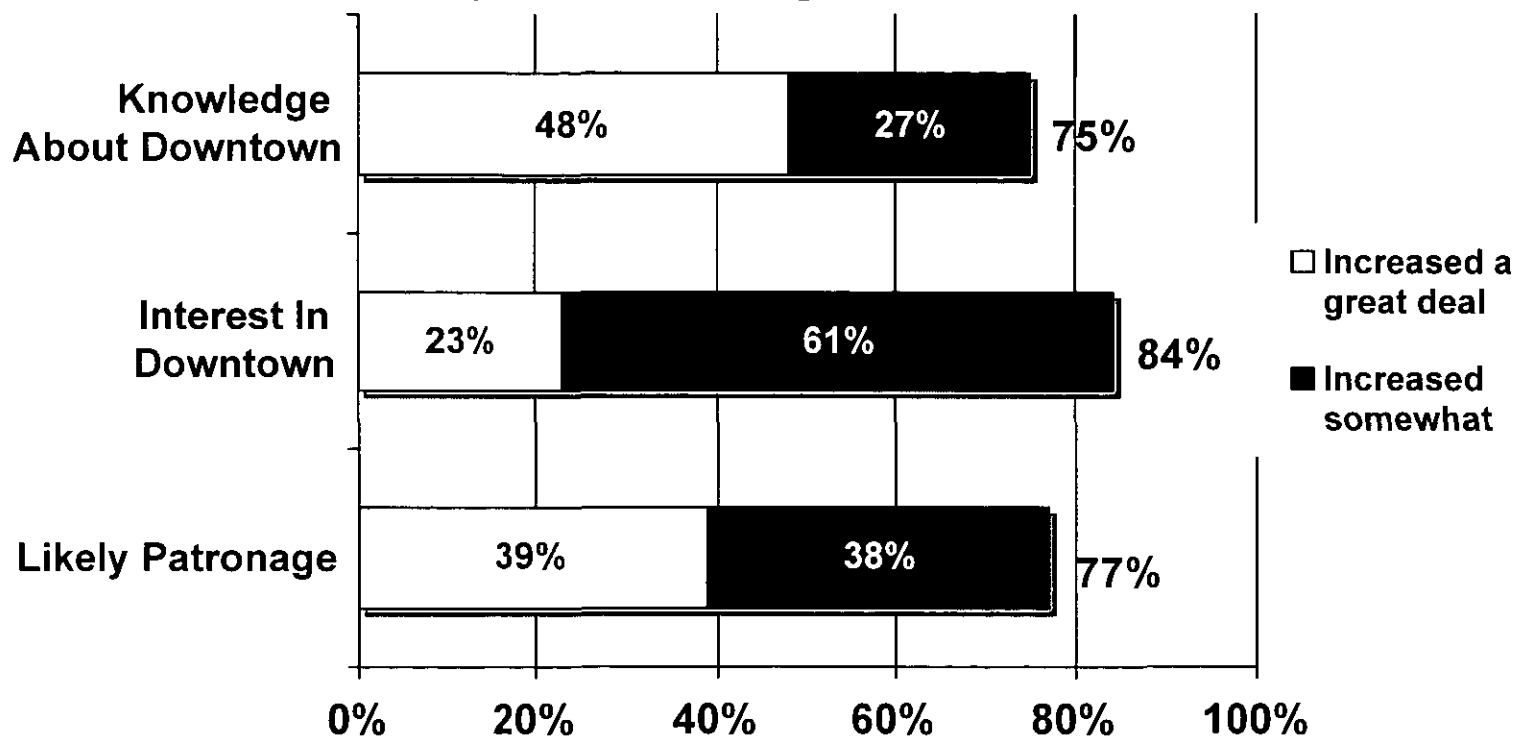
		Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=350
Aware and Have Seen "DOWNTOWN"		44%	28%	24%	32%
Aware but Have Not Seen "DOWNTOWN"		13%	36%	25%	30%
TOTAL Awareness		57%	64%	49%	62%
How Become Aware of "DOWNTOWN"	TV Ads	62%	23%	45%	42%
	Other Communications	29%	25%	23%	23%
	Billboards	6%	26%	15%	14%
	DAA Publications	13%	12%	15%	14%

The DAA produces a weekly television series on KLRU, the Austin public television station, called "DOWNTOWN " Have you heard of it? IF YES, How did you hear about or learn about the television show "DOWNTOWN"? Have you seen it <once, two or three times, four or more times, or not at all>?

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DAA Communications

Impact of Viewing "DOWNTOWN"



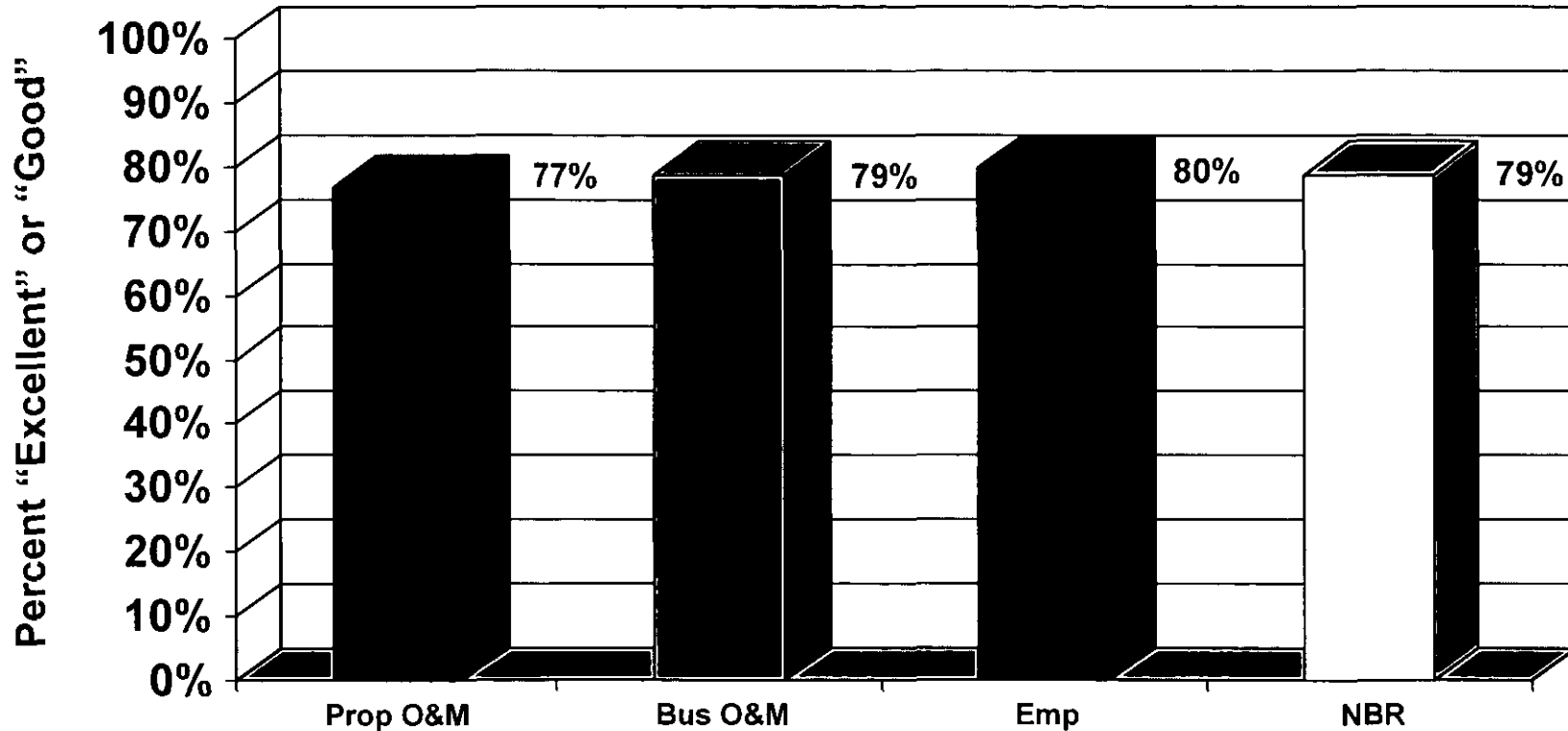
n = 89

- More than 75% of all stakeholders who have seen the show say "DOWNTOWN" has made them more likely to patronize downtown (differences among stakeholder groups are quite small)

How much has the television program "DOWNTOWN" increased your knowledge of Downtown Austin <a great deal, somewhat, just a little, or not at all>? How much has the television program "DOWNTOWN" increased your interest in Downtown Austin <a great deal, somewhat, just a little, or not at all>? Having seen the program, would you say you are much more likely, somewhat more likely, a little more likely, or no more likely to visit Downtown Austin?

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Overall Evaluation of the DAA



- Approximately 80% of each stakeholder group believe that the DAA is doing an "Excellent" or "Good" job
- There is no change between 2005 and 2007

IF VERY, SOMEWHAT OR NOT SO FAMILIAR <with the DAA> How would you characterize the job the DAA is doing? Is it excellent, good, fair, or poor?

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Importance of DAA Activities Going Forward

Stakeholders assign high levels of importance to nearly every issue measured. As in 2005, in 2007:

- **Prop O&Ms** consider it most important that the DAA
 - » Facilitate the development of downtown housing
 - » Pursue sidewalk improvement and tree planting
 - » Attract and retain downtown businesses
 - » Expand downtown shopping
- **Bus O&Ms** think it is most important that the DAA
 - » Pursue sidewalk improvement and tree planting
 - » Increase security downtown
 - » Take a leadership role in downtown transportation planning
 - » Revitalize public parks
- **Employees** think it is most important that the DAA
 - » Pursue sidewalk improvement and tree planting
 - » Reduce impact of street closures

Importance of DAA Activities Going Forward

2007 Mean Ratings

	Prop O&M n=100	Bus O&M n=100	Emp n=100
Facilitating Development of Downtown Housing	8.5	8.1	7.9
Sidewalk Improvement & Tree Planting	8.4	8.5	8.4
Facilitating the Expansion of Downtown Shopping	8.3	8.1	8.1
Working to Attract and Retain Downtown Business	8.3	7.8	8.0
Providing Information on DAA Website	8.2	8.0	8.0
Improving the Appeal and Use of East 6 th Street	8.2	8.0	7.8
Increasing Security in Downtown	8.1	8.4	8.1
Working with City to Reduce the Impact of Street Closures	8.1	7.7	8.3
Facilitating the Availability of more Parking for Downtown Visitors	8.1	7.8	8.2
Advocating for the Development of Arts and Culture in Downtown	8.1	8.2	7.7
Promoting Downtown Austin via TV	8.1	8.0	7.5
Advocating for Revitalization of Public Parks Downtown	8.0	8.3	8.1
Taking a Leadership Role in Downtown Transportation Planning	7.9	8.4	7.5

On a 10 point scale, where 1 is "not at all important" and 10 is "very important," how important do you think it is that the DAA pursue the following <sidewalk improvement & tree planting, increasing security in downtown, facilitating availability of more parking for downtown visitors, facilitating the development of downtown housing, working to attract and retain businesses in downtown locations, advocating to develop arts and culture in downtown, working with the city to reduce the impact of street closures, improving the appeal and use of East 6th Street, taking a leadership role in downtown transportation planning, facilitating the expansion of shopping downtown, advocating for revitalization of public parks downtown, providing information relevant to downtown on the DAA website, and promoting downtown through television programming>?

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Stakeholders' Suggestions for the DAA

- Stakeholders' most commonly mentioned recommendations for the DAA going forward are:
 - » **Improve Parking Access**
 - » **Solve Transportation Problems** Planning / Short and Long Term
 - » **Ensure Beautification.** Parks / Cleanliness
- Other suggestion themes (less commonly mentioned) include.
 - » Improve Communication
 - » Develop Volunteering Opportunities

Do you have any other suggestions or recommendations about activities the DAA should pursue?

Stakeholders' Suggestions for the DAA

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
IMPROVE PARKING	<i>"The parking situation needs to be ironed out " B</i> <i>"Create more parking for downtown " E</i> <i>"Do something to create more parking spaces " E</i> <i>"We need more parking garages built downtown " N</i> <i>"I'd like to see more parking for businesses and employees " B</i>
SOLVE TRANSPORTATION PROBLEMS	<i>"Help find a solution to the traffic in downtown " P</i> <i>"I would like to see more transportation solutions in place " E</i> <i>"Do something about the traffic problem coming to work every day " E</i> <i>"We've got to have more options for transportation " E</i> <i>"Do something for mass transit in this town " P</i> <i>"Alternative traffic solutions -- mass transit, rail " B</i> <i>"Plan better for the growth of the community " B</i> <i>"Add more mass transit -- busses, trolley " P</i> <i>"Need that train " N</i>

P = Prop O&M B = Bus O&M E = Emp N = NBR

Do you have any other suggestions or recommendations about activities the DAA should pursue?

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Stakeholders' Suggestions for the DAA

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
ENSURE BEAUTIFICATION	<i>"We need to preserve the parks and wildlife " B</i> <i>"Our parks need to be maintained better " B</i> <i>"Pay more attention to the parks " E</i> <i>"They don't keep up the parks like they used to " P</i> <i>"More green spaces and trees " B</i> <i>"Focus on the environment more " B</i> <i>"Fix up the historical sites and capitol grounds more " P, E</i> <i>"Work on their clean up program a little more " P</i> <i>"Take care of historical landmarks " N</i> <i>"More trees and landscaping need to be added " N</i> <i>"Need to focus on cleaning up the streets " E</i> <i>"Create more environmental programs for Downtown Austin " P</i>

P = Prop O&M B = Bus O&M E = Emp N = NBR

Do you have any other suggestions or recommendations about activities the DAA should pursue?

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Outline of Key Findings

- I. Perceptions of Austin's Downtown Area
- II. Usage Patterns
- III. Perceptions of the DAA
- IV. Summary and Recommendations**
 - » Research Summary
 - » Recommendations

Summary

- Downtown is evaluated favorably on nearly every dimension—the sole exception is transportation to and within downtown
- Its character is exciting and inviting It is considered “a community” and the heart of Austin Particular assets stakeholders value include an atmosphere that is energetic and friendly, the diversity of cultural attractions and special events, and ongoing development and improvements
- The DAA itself receives favorable evaluations, approximately 80% of each stakeholder group believes the DAA is doing an “excellent” or “good” job One in three Property Owners & Managers and Business Owners & Managers, however, believe they don’t receive enough communication from the DAA A notably larger percentage (61%) of employees say they get “too little information” from the DAA.
- The most pressing challenges stakeholders reference are
 - » Transportation (parking, traffic to and within downtown)
 - » Preserving, improving, and expanding green space
 - » Managing downtown growth while retaining the distinctive (including quirky and laid-back) atmosphere that they value

Recommendations

STAY THE COURSE

- **Continue to focus on Beautification**
 - » Continue to focus on the visual appeal of the natural and built environment. This may include facilitating the restoration of historic buildings, protecting and improving parks and green spaces, and ensuring not only the cleanliness of streets and sidewalks but also the air.
- **Continue to address Parking concerns**
 - » Ensure adequate availability, support affordability, and improve downtown users' and visitors' awareness of parking options.
- **Harness the Enthusiasm about Downtown Austin**

UP THE ANTE

- **Drive Traffic solutions—in collaboration with other key stakeholders**
 - » Address the widespread frustrations and nagging problems of transportation to and within downtown. Despite downtown stakeholders' low familiarity with and usage of the Dillo, they appear to be increasingly enthusiastic about mass transit / light rail. Consider the DAA's leadership role in identifying and implementing a complex and multifaceted solution to transportation to and within downtown.

Recommendations

STRATEGIC PRIORITIES FOR THE FUTURE

- **Determine the DAA's Leadership Role in Managing the Downtown Austin "Brand"**
 - » The image of downtown as "the heart of the city," "a community," "exciting," "inviting," "friendly," and "historically interesting" are extremely valuable intangible assets with tangible benefits. Expect to defend and protect the desired brand image or it will change (and probably not for the better). The distinctive and appealing "ATMOSPHERE" or character is already somewhat threatened. It is reasonable to expect it to erode in the absence of careful and committed management.
- **Determine the DAA's Communications Priorities**
 - » Increased vitality builds increased interest in / demand for information. The DAA's voice will be lost in the absence of substantially increased efforts. It is time to establish clear communications targets (stakeholder groups), related goals, and corresponding resources in light of the growing challenge. Determine the extent of the DAA's commitment to being THE SOURCE of information about Downtown Austin.
- **Develop A New Strategic Vision and Plan for the DAA in the context of the Downtown Plan**
 - » Over the last 15 years, the DAA and Downtown Austin have experienced extraordinary success. Downtown is cleaner, safer, and far more vital. The downtown area has been transformed from Austin's liability to its crown jewel.
 - » That said, the needs and opportunities of the next 10 years will not resemble those of the last decade. It is not time for "business as usual." In the context of your history of success and a growing and vital downtown area, you are well positioned to develop strategic vision for the future of downtown and the DAA. Build the legacy of Downtown Austin's future.

Profile of M. Crane & Associates, Inc.

M. Crane & Associates, Inc is an Austin-based firm that supports critical business decisions by offering consulting on brand strategy and implementation, strategic planning, and quantitative and qualitative market research

Since 1990, the firm has focused on providing research and consulting for global and local businesses, non-profits, and public sector clients

Every project begins with a focus on clients' unique business decisions and related information needs. We customize the approach to each project to ensure that we directly and effectively inform business decisions. We are firmly and unequivocally committed to collaborative engagements that advance our clients' success.

Marie Crane, Ph.D., directs all projects. Dr. Crane obtained a Ph.D. from the University of Michigan where she studied and taught at the widely acclaimed Survey Research Center. Prior to founding the firm, she was a professor at the University of Texas at Austin. She is an active community volunteer and has served on numerous community boards, including the boards of Capital Area United Way, SafePlace, the Paramount Theatre, and Seton Healthcare Network.