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12/17/09

Downtown Austin Alliance

Assessments of Downtown Austin and the Downtown Austin Alliance

Biannual Tracking Survey Report

September, 2009

M. CRANE & ASSOCIATES, INC.

Research Objectives

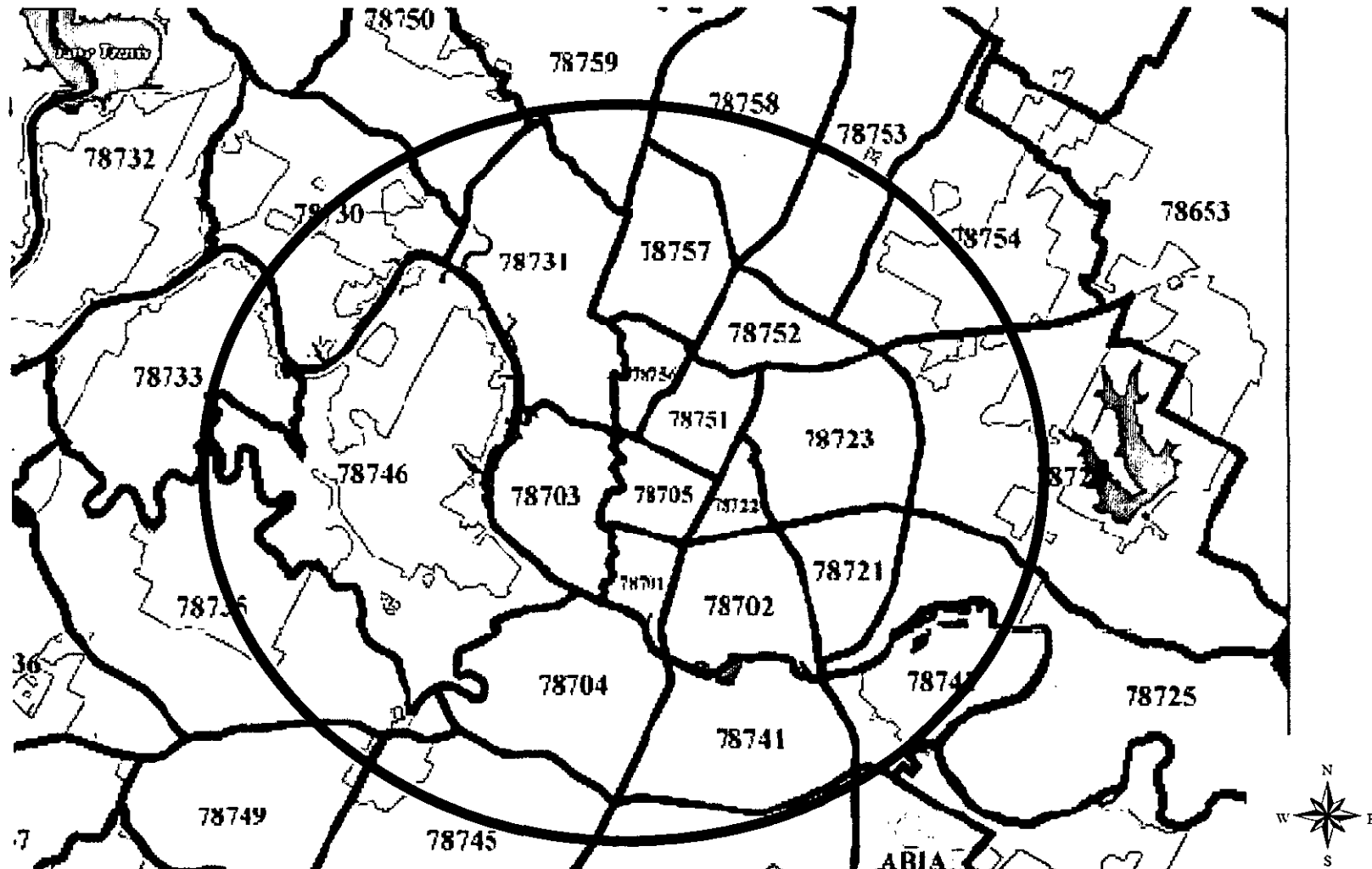
1. To monitor key **stakeholders' perceptions of Downtown Austin**, including:
 - Perceived strengths
 - Perceived weaknesses
 - Recommended changes
2. To monitor **awareness of the DAA** and its programs and communications, and to assess **overall effectiveness**.
3. To identify important **trends and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

Research Methodology

- In 2009, **551 telephone interviews** were conducted between July 8 and July 17 with these four stakeholder groups:

Stakeholder Group	Number of Completed Interviews	Sample Source
Downtown Property Owners and Managers (Prop O&Ms)	100	List
Downtown Business Owners and Managers (Bus O&Ms)	101	List
Downtown Employees (Emps)	100	RDD
Other Downtown Nearby Residents (NBRs)	250	RDD

Nearby Residents



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Overall Evaluation of Downtown

	Prop O&Ms n=100	Bus O&Ms n=101	Emps n=100	NBRs n=350
SAFETY during the DAY	8.7	8.8	8.6	8.7
Acceptable COMMUTE to downtown	8.6	8.9	8.8	8.8
INTERESTING places and things	8.4	8.2	8.3	8.3
CLEANLINESS of streets and buildings	8.3	8.6	7.9	8.3
Ease of GETTING AROUND downtown	8.3	8.3	8.1	8.2
VISUAL appeal	8.1	8.0	8.4	8.2
Desirable place to SHOP	8.0	8.1	7.9	8.0
SAFETY during the NIGHT	7.8	7.7	7.3	7.5
Desirable place to WORK	7.7	8.2	7.9	7.8
Desirable place to LIVE	7.4	8.3	7.7	7.7

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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Evaluation of Downtown Compared to 3 Years Ago

		Prop O&Ms n=100	Bus O&Ms n=101	Emps n=100	NBRs n=350
		% Better	% Better	% Better	% Better
Notably Better	INTERESTING places and things	72%	69%	56%	62%
	VISUAL appeal	66%	60%	61%	61%
	Desirable place to LIVE	63%	66%	62%	59%
	CLEANLINESS of streets and buildings	61%	66%	53%	55%
	SAFETY during the DAY	58%	67%	57%	62%
	Desirable place to SHOP	58%	60%	63%	63%
	SAFETY during the NIGHT	58%	59%	56%	55%
	Desirable place to WORK	40%	54%	57%	55%
Not Better	Ease of GETTING AROUND downtown	41%	38%	37%	38%
	Acceptability of COMMUTE to downtown	24%	20%	22%	23%

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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DAA's Vision for Downtown Austin

Downtown Austin is the heart and soul of Central Texas.

It's:

- *a welcoming community where our unique past, present, and future meet and mingle on every street and corner*
- *a thriving business, government, and residential center*
- *an accessible gathering place, easy to reach and enticing to explore for locals and tourists alike*
- *the community's cultural hub, where art and music dance and play*
- *a place where nature's beauty beckons -- to calm, surprise and delight*
- *a prosperous place, environmentally and economically healthy and sustainable*
- *a vibrant neighborhood of suits and boots, bats and Birks*

Image of Downtown

	Prop O&Ms n=100	Bus O&Ms n=101	Emps n=100	NBRs n=350
The Heart of the City	9.1	9.3	9.3	9.3
Inviting	8.6	8.5	8.4	8.4
A Community	8.4	9.0	8.7	8.7
Friendly	8.4	8.4	8.5	8.4
Historically Interesting	8.3	8.7	8.3	8.4
Eclectic	8.3	7.8	7.6	7.9
Thriving	8.1	8.1	7.8	7.9
Exciting	8.0	8.5	7.9	8.3
Fun	7.7	8.6	8.0	8.0
A Cultural Hub	7.3	7.6	7.7	7.6
Mainly a Place for Young People	5.2	4.7	5.3	5.0
Exclusive	5.3	4.8	4.5	4.6

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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Perceived Assets/Strengths of Downtown

Five assets or strengths of downtown most frequently mentioned:

- **Cultural Offerings and Events***
 - Festivals / Museums / Art Exhibits / Music / Entertainment
- **Natural Environment***
 - The Existence of Parks / Green Spaces
- **The Atmosphere* -- friendly, informal, diverse**
 - Energy / People / Attitude / Character
- **Dining / Restaurants**
 - Number and Variety
- **Size / Walkability**
 - Neither too big nor too small

Note: Analysis based on all stakeholder groups. Respondents identify a great variety of strengths of Downtown Austin

* Indicates also widely mentioned strengths in 2007.

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

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Perceived Assets/Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
CULTURAL OFFERINGS AND EVENTS: Festivals / Museums / Art Exhibits / Music / Entertainment	<i>"A lot of cool goings-on during the weekends." N</i> <i>"Art festivals and music festivals." B</i> <i>"The fun things to do." N</i> <i>"The outdoor art installations." P</i> <i>"They have some great events." E</i> <i>"The museums are phenomenal." P</i> <i>"They have some fun family things to do." N</i> <i>"They have great live music." E</i> <i>"There is always something to do there." 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?

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Perceived Assets/Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
NATURAL ENVIRONMENT: The Existence of Parks / Green Spaces	<p><i>"They have put in a lot of trees - that makes it look better."</i> B</p> <p><i>"Lots of parks downtown."</i> E</p> <p><i>"The city's natural resources are the key to its success."</i> B</p> <p><i>"The tree planting and beautification efforts."</i> N</p> <p><i>"The parks are a strength of downtown."</i> E</p> <p><i>"I enjoy Lady Bird Lake and the park around it."</i> N</p> <p><i>"The parks are a good place to get away from work for a while."</i> P</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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Perceived Assets/Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
The ATMOSPHERE: Energy / People / Attitude / Character	<p><i>"The diversity of downtown is what I like."</i> E</p> <p><i>"Austin has a good vibe to it."</i> B</p> <p><i>"Friendly people in the core of the city."</i> E</p> <p><i>"Downtown has a cool feel to it. I guess I would call it hip or trendy."</i> N</p> <p><i>"I like that Austin still remains grounded in its roots."</i> N</p> <p><i>"Its ability to draw in people from many backgrounds."</i> P</p> <p><i>"Very laid back."</i> N</p> <p><i>"It's the hub of the city."</i> 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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Perceived Assets/Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
DINING / RESTAURANTS	<i>"The choice of places eat is excellent."</i> N <i>"Great food and bars."</i> P <i>"A lot of really good restaurants now."</i> E <i>"More restaurants and eateries have moved here."</i> N <i>"The addition of more places to eat."</i> B

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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Perceived Assets/Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
SIZE / WALKABILITY	<i>"It's a small enough area to walk."</i> B <i>"Everything is close together."</i> N <i>"It's easy to get from work to a restaurant at lunchtime."</i> E <i>"Everything is in walking distance."</i> P <i>"You don't even have to get in your car to go to lunch."</i> P

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

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Areas of Concern / for Improvement

Areas of concern / for improvement most frequently mentioned:

- **Traffic / Transportation***
- **Inadequate Parking****
- **Attention to Environment, Parks, and Green Spaces***
 - Environmental Problems
- **Excessive Growth***
 - Loss of Unique Character
- **Attention to Historic Character and Buildings**

Note. Analysis based on all stakeholder groups.

* Also widely mentioned weaknesses in 2007.

**Longstanding weakness.

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

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

Is there anything else you want to call to the attention of the DAA?

Areas of Concern / for Improvement

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
TRAFFIC / TRANSPORTATION	<p><i>"I would say traffic is the weakest point." B</i></p> <p><i>"There is horrible traffic in the mornings." E</i></p> <p><i>"The bus system needs improvement." E</i></p> <p><i>"There are way too many people driving to work alone." B</i></p> <p><i>"It's too hard to get in and out of downtown everyday. I'm actually trying to find a job elsewhere." P</i></p> <p><i>"Maybe they could give people incentive to ride the bus." B</i></p> <p><i>"It is a MUST to install a mass transit system that works." P</i></p> <p><i>"More bike lanes." N</i></p> <p><i>"Safer bicycle paths . . . that don't cross major intersections." B</i></p>

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?
Do you have any other suggestions or recommendations about activities the DAA should pursue?
Is there anything else you want to call to the attention of the DAA?*

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Areas of Concern / for Improvement

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
INADEQUATE PARKING	<p><i>"Need a long-term solution to the parking situation." B</i></p> <p><i>"I hate that there is not enough parking." E</i></p> <p><i>"I spend more on parking than on gas." P</i></p> <p><i>"Some of the parking needs to be paid in part by the corporations that are moving into our great city." N</i></p> <p><i>"There is definitely not enough parking down there." B</i></p> <p><i>"I try to steer clear of downtown because of parking issues." N</i></p> <p><i>"The parking is the worst I've ever seen." E</i></p>

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*What do you consider to be the most important weaknesses or shortcomings of the downtown area?
Do you have any other suggestions or recommendations about activities the DAA should pursue?
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Areas of Concern / for Improvement

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
ATTENTION TO ENVIRONMENT, PARKS AND GREEN SPACES: Environmental Problems	<p><i>"The growth is not good for the environment." P</i></p> <p><i>"The environment needs help." B</i></p> <p><i>"The environment needs more attention. I'm concerned." E</i></p> <p><i>"We need more green." E</i></p> <p><i>"I'd like to see better landscaping on the streets." N</i></p> <p><i>"The parks need some TLC." P</i></p> <p><i>"The older parks should be better kept." N</i></p> <p><i>"Too much concrete. Not enough green." P</i></p> <p><i>"I'd like to see them plan more for parks than buildings." N</i></p> <p><i>"The air pollution has gotten progressively worse with all of the people now working downtown." N</i></p> <p><i>"The air quality is bad, especially in the summertime." B</i></p>

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Areas of Concern / for Improvement

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
EXCESSIVE GROWTH: Loss of Unique Character	<p><i>"I would like to see Austin slow down a bit and not place so much emphasis on growth." N</i></p> <p><i>"Just too much growth over the past 10 years." E</i></p> <p><i>"Downtown is too corporate now." B</i></p> <p><i>"I think that downtown has suffered due to all the corporations moving in and taking over." E</i></p> <p><i>"Large population of yuppies taking over." N</i></p> <p><i>"People aren't as friendly nowadays." P</i></p> <p><i>"I wish the city would keep it its roots -- eclectic, hippy." E</i></p> <p><i>"People that have moved here from elsewhere are changing the way this city is viewed for the worse." P</i></p>

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?

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

Is there anything else you want to call to the attention of the DAA?

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Areas of Concern / for Improvement

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
ATTENTION TO HISTORIC CHARACTER / BUILDINGS	<p><i>"The history of Austin is very important."</i> P</p> <p><i>"Some of the historical sites need our help."</i> E</p> <p><i>"I'm afraid that the historical buildings will be knocked down."</i> B</p> <p><i>"The historical sites should be thought of when they are expanding."</i> N</p> <p><i>"The historic buildings are dilapidated."</i> P</p> <p><i>"Some of the city's historic sites need to be cleaned up."</i> N</p> <p><i>"Fix up the historic buildings."</i> N</p> <p><i>"I'm just hoping they aren't going to tear down any historical landmarks."</i> E</p> <p><i>"Don't destroy any of the old buildings."</i> P</p> <p><i>"Historical landmarks should be kept better."</i> E</p> <p><i>"Protect the history."</i> B</p>

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Transportation To & Within Downtown

Mode of Transportation		Prop O&Ms n=100	Bus O&Ms n=101	Emps n=100
Downtown Commute	Own Vehicle	68%	72%	72%
	Car Pool	18%	15%	14%
	Public	9%	6%	6%
	Walk	5%	7%	7%
Within Downtown	Own Vehicle	38%	43%	45%
	Public	18%	10%	8%
	Walk	49%	40%	40%
	Bike	4%	6%	7%
Average Amount Spent / Month on Parking		Prop O&Ms n=100	Bus O&Ms n=101	Emps n=100
Nothing		21%	31%	28%
<\$50		48%	37%	44%
\$50-\$74		12%	19%	14%
>\$75		19%	13%	14%

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

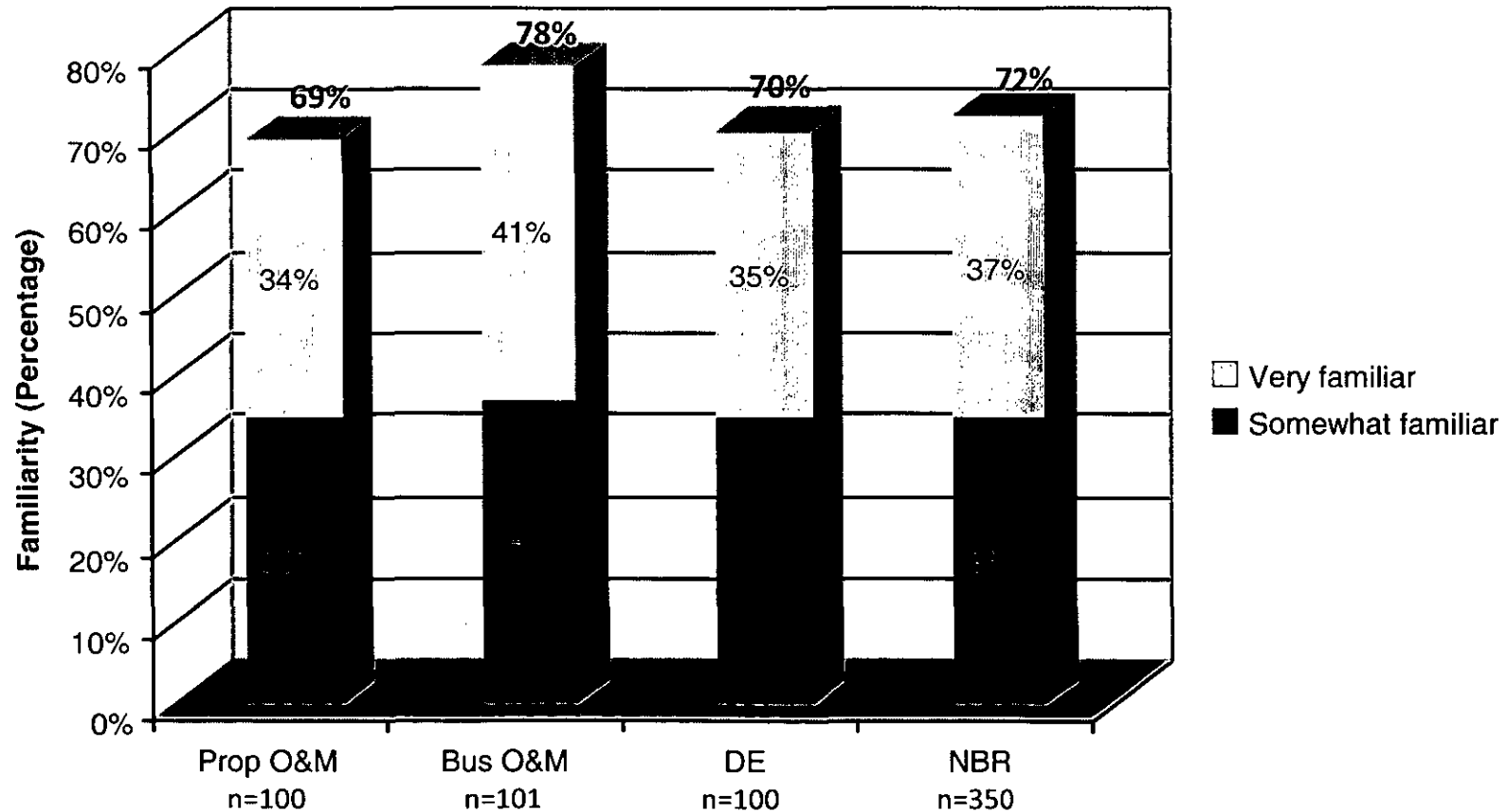
How do you typically commute to and from downtown? Do you <drive your own vehicle, car pool or van pool, take public transportation such as the bus or the Dillo, or do you walk or ride a bicycle>?

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>?

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Familiarity with the DAA

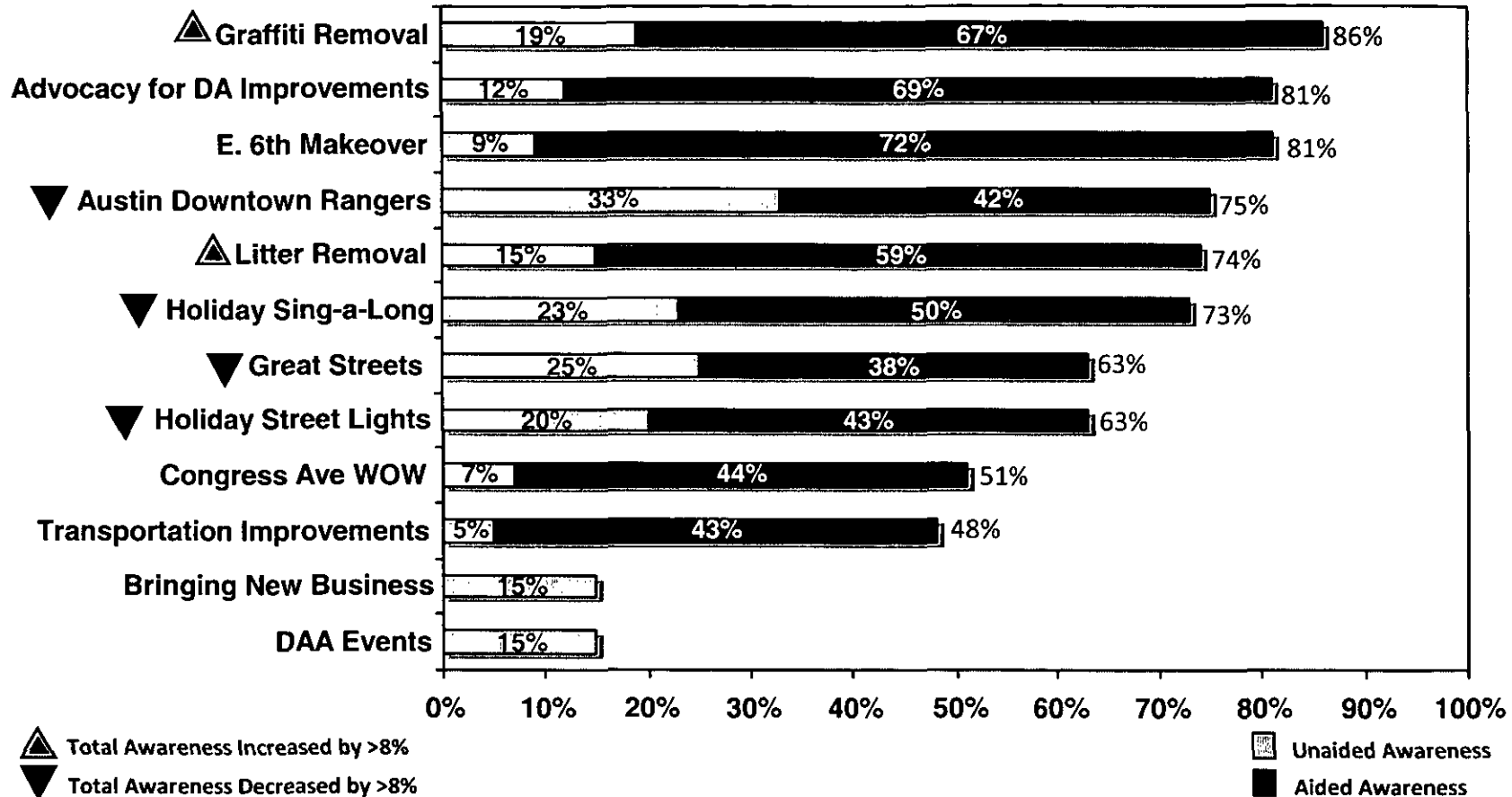
Levels of familiarity are high and unchanged since 2007.



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

Combines All Segments

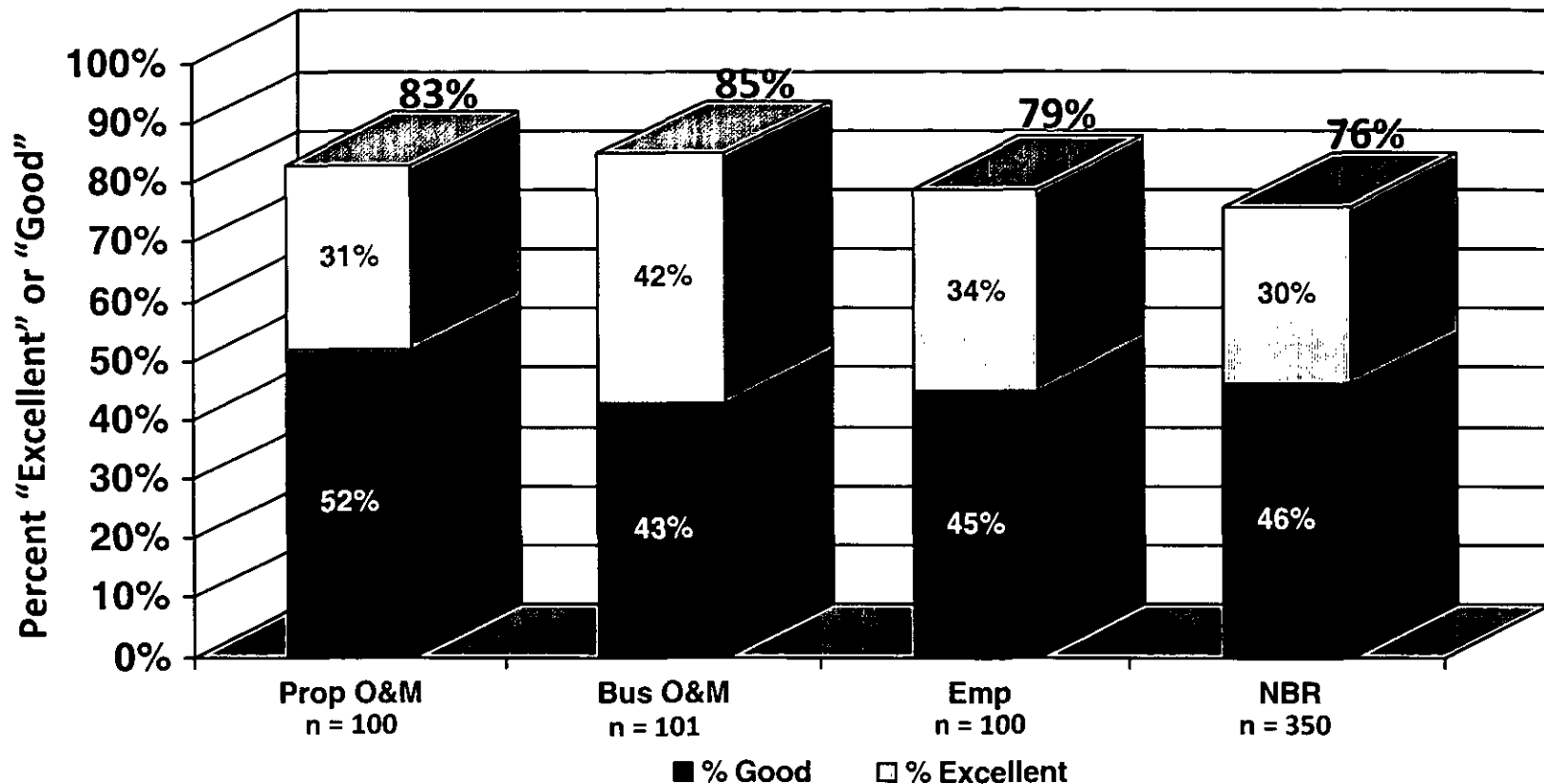


Note: Respondents who indicate awareness of the existence of these offerings may be unaware that they are sponsored by the DAA.

Which activities of the DAA have you heard about? Any others? Are you aware of the following activities of the DAA <The 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; Advocacy for Downtown Improvement; the East 6th Street Makeover; Congress Avenue WOW!; Downtown Transportation Planning and Mobility Improvements>?

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Overall Evaluation of the DAA



- All groups evaluate the DAA favorably.
- PO&Ms and BO&Ms evaluations are slightly improved (reflecting a 6% increase for each group) compared to 2007 (data not shown).

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

Mean Ratings

	Prop O&M n=100	Bus O&M n=101	Emp n=100
Housing	8.5	8.0	8.0
Shopping	8.4	8.2	8.1
Congress Ave.	8.4	8.1	8.2
Sidewalks Trees	8.2	8.5	8.6
Public Parks	8.2	8.2	8.2
East 6 th Street	8.2	7.9	8.1
Security	8.1	8.2	8.4
Arts and Culture	8.1	8.1	8.4
Wayfinding	8.1	8.0	8.0
Transportation Planning	8.0	8.2	8.3
DAA Website	8.0	8.2	8.1
Promoting Downtown via TV	8.0	8.1	8.3
Attract and Retain Business	7.9	8.3	8.3
Reduce the Impact of Street Closures	7.8	8.2	8.2

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; developing wayfinding measures to enhance downtown navigation and parking; 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 downtown squares and parks; providing information relevant to downtown on the DAA website; and promoting downtown through regional marketing>?

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Summary

- **Perceptions are positive.** Downtown is evaluated favorably on nearly every dimension—the sole **exception is transportation** ingress and egress and mobility within downtown.
- **Favorable attributes.** 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, more and better restaurants, the diversity of cultural attractions (especially arts and music) and special events, and the presence of parks and green spaces.
- **Right Size.** It seems to many that Downtown Austin is now “just the right size.”
- **DAA viewed favorably.** The DAA itself receives favorable evaluations; more than 80% of both groups -- Property Owners & Managers and Business Owners & Managers -- believe the DAA is doing an “excellent” or “good” job.
- **Areas for improvement.** The most pressing challenges stakeholders mention are:
 - Transportation (parking, traffic to and within downtown)
 - Protecting the natural environment, improving, and expanding and improving green spaces -- with tree plantings, park maintenance, etc.
 - Protecting Downtown Austin’s distinctive atmosphere and historic character

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 services 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 Family of Hospitals.

Notes Page

Biannual Survey 1995 - 2009. 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 2009 Tracking Survey.

Definition of Downtown: The area between Lady Bird Lake (aka Town Lake) on the south and Martin Luther King on the north and between I-35 on the east and Lamar Boulevard on the west.

These interviews averaged 23 minutes in length for Prop and Bus O&Ms and 17 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).