Assessments of Downtown Austin and the Downtown Austin Alliance

Biannual Tracking Survey Report

October, 2011

Research Objectives

This research will be used by the DAA:

- To monitor key stakeholders' perceptions of Downtown Austin
- 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.

The mission of the Downtown Austin Alliance is to preserve and enhance the value and vitality of downtown Austin.

Research Methodology

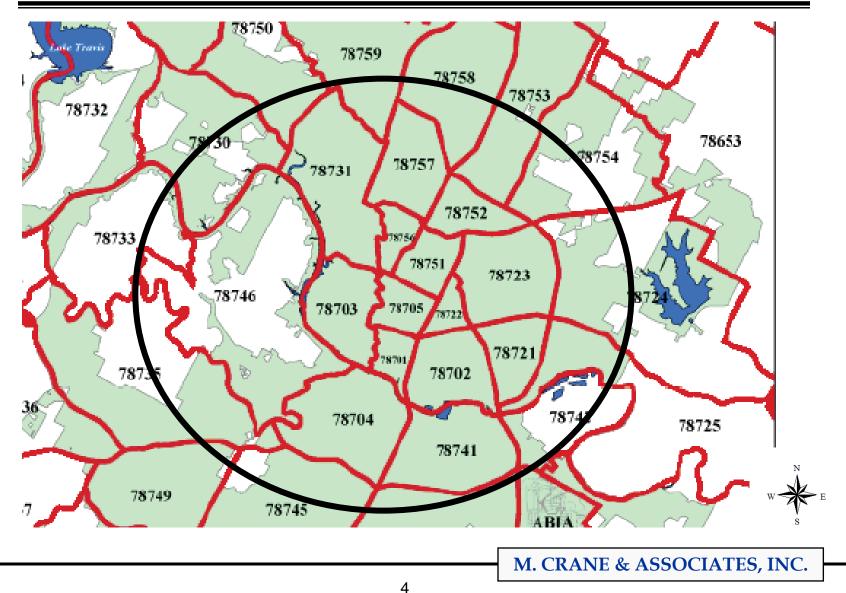
In 2011, 550 telephone interviews were conducted between June 27 and July 18 with these four stakeholder groups:

Stakeholder Groups	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

The number of stakeholder groups Stakeholder Groups included in the survey has increased over Prop Ns Bus NS Emps NBRS the years. 1995 - 2003 Х Х Х 2005 - 2011 Х Х Х Х

See Methodological Appendix for a description of sample sources for Prop O&Ms, Bus O&Ms, and Emps. 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).

Nearby Residents



Overall Evaluation of Downtown

	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=250
SAFETY during the DAY	8.8	8.7	8.8	8.7
INTERESTING places and things	8.3	8.6	8.1	8.1
CLEANLINESS of streets and buildings	8.0	8.2	8.3	8.5
Ease of GETTING AROUND Downtown	8.0	8.4	8.1	8.3
VISUAL appeal	8.3	8.1	8.4	8.2
Desirable place to SHOP	7.8	8.6	8.2	8.2
SAFETY during the NIGHT	7.2	7.4	7.7	7.4
Desirable place to WORK	8.2	7.8	7.8	7.8
Desirable place to LIVE	7.1	7.6	8.0	7.6

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, ease of getting around within the downtown area?

Downtown Considered "Better" Now than 3 Years Ago

		Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=250
	SAFETY during the NIGHT	67%	58%	64%	56%
_	Desirable place to LIVE	61%	60%	53%	60%
Notably	INTERESTING places and things	61%	70%	49%	65%
oly B	CLEANLINESS of streets and buildings	58%	57%	49%	65%
Better	Desirable place to SHOP	56%	57%	54%	61%
er	SAFETY during the DAY	54%	68%	59%	63%
	VISUAL appeal	57%	60%	64%	62%
	Desirable place to WORK	50%	45%	49%	58%
_					
Not Better	Ease of GETTING AROUND Downtown	31%	42%	35%	41%
ot tter	Acceptability of COMMUTE to Downtown	19%	18%	19%	20%

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>?

Image of Downtown

	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs n=250
The Heart of the City	9.0	9.2	9.2	9.2
A Community	8.7	8.7	8.4	8.7
Inviting	8.5	8.4	8.4	8.4
Friendly	8.5	8.2	8.6	8.2
Historically Interesting	8.5	8.4	8.6	8.3
Exciting	7.9	8.5	7.9	8.3
Fun	7.9	8.8	8.0	7.9
Eclectic	8.0	8.1	7.7	7.9
Thriving	7.9	8.3	7.9	7.7
Convenient	8.0	8.1	8.0	7.8
A Cultural Hub	7.7	7.8	7.9	7.2
Mainly a Place for Young People	5.0	5.1	5.0	5.1
Exclusive	5.4	4.9	4.1	4.8

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.

The assets or strengths of Downtown most frequently mentioned:

- Cultural Offerings and Events
- Improved Safety*
- Natural Environment
- Historic Character*
- Dining / Restaurants
- Improved Transportation*
- The Atmosphere -- friendly, informal, diverse
- Improved Cleanliness*
- Improved Mix Housing and Shopping*
- Size and Walkability

* Indicates a new top strength in 2011

Note: Based on all respondent groups.

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

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
	"Lots of great shows and cultural entertainment." B
CULTURAL	"They have great activities on the weekends." B
	"They have many things to do for all types of personalities." E
OFFERINGS	"Music festivals." N
AND EVENTS:	"SXSW is the best festival of all." N
Festivals /	"Great museums and arts district." N
Museums / Art	"The free events that they have downtown." E
Exhibits / Music /	"The arts district has a great vibe to it." P
Entertainment /	"The museums are really nice and have great exhibitions." N
	"I look forward to Christmas [downtown] every year." N
	"I always feel safe." B
	"Downtown is much more secure and safer than it used to be." N
IMPROVED	"Downtown is much more secure and safer than it used to be." N "I think the crime rate has dwindled." B
SAFETY:	"I think the crime rate has dwindled." B
SAFETY: Reduced Crime /	<i>"I think the crime rate has dwindled."</i> B <i>"I definitely feel safer downtown now."</i> P
SAFETY: Reduced Crime / Presence of	"I think the crime rate has dwindled." B "I definitely feel safer downtown now." P "I like the stepped up patrols by the police and the Rangers." N
SAFETY: Reduced Crime /	"I think the crime rate has dwindled." B "I definitely feel safer downtown now." P "I like the stepped up patrols by the police and the Rangers." N "The police have a greater presence downtown." B
SAFETY: Reduced Crime / Presence of	"I think the crime rate has dwindled." B "I definitely feel safer downtown now." P "I like the stepped up patrols by the police and the Rangers." N "The police have a greater presence downtown." B "I do like the Austin Rangers program." N
SAFETY: Reduced Crime / Presence of Police & Rangers = Prop O&M B = Bus C	"I think the crime rate has dwindled." B "I definitely feel safer downtown now." P "I like the stepped up patrols by the police and the Rangers." N "The police have a greater presence downtown." B "I do like the Austin Rangers program." N "The Rangers are helpful people." B "Downtown is much safer than some other cities." P

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TOPIC	ILLUSTRATIVE VERBATIM QUOTES
NATURAL ENVIRONMENT: The Existence of Parks / Green Spaces	 "The tree plantings are great." P "Good work on the tree plantings." N "The parks and walking trails." N "The parks. And Lady Bird Lake is beautiful." N "I like the parks and bike trails." E "The Capitol grounds are lovely." N "The parks are a fun place to hang out in the daytime." P "The parks are clean and are filled with people." B
HISTORIC CHARACTER:	"The history is our greatest strength." B "I love that there is so much history Downtown." E "I like the classic older buildings." B "The historical sites are a good tourist attraction." E "The Capitol restoration." B "I like how they've restored many of the older buildings." N "I love the history in the downtown area." E

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?

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
DINING / RESTAURANTS:	"Great restaurants now." P "I like all the restaurants that have moved Downtown." B "They have good restaurants down here." N "The restaurants and coffee houses." N "They have a really good bar scene." P
IMPROVED TRANSPORTATION: Train / Roads / Walking / Biking	"They are coming up with solutions to the traffic." P "The transportation options that they have in the works." N "The new train system that they're building." N "The streets have improved greatly." E "They have made great strides in making the streets more passable." N "I like how Downtown has walking and biking routes." N "Bike riding is easier." E "I like that you don't have to drive your car once you get to work." N

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

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

TOPIC	ILLUSTRATIVE VERBATIM QUOTES	
	"I like the Downtown atmosphere." B	
	"There's a lot of diversity with the population now." N	
	"I like how this city draws in people from all different backgrounds." N	
The ATMOSPHERE:	<i>"I like how it still seems like a smaller town even though the population has exploded here."</i> B	
Energy / People /	"It's still got that laid back feel to it." P	
Attitude /	"There is still a relaxed atmosphere downtown." P	
Character	<i>"I like the weird feel that Austin has to it."</i> N	
	"People are very friendly downtown." N	
	"The people here are awesome." E	
	"You've gotta love the people." B	
	"Downtown is cleaner." P	
	<i>"I like how they've cleaned it up quite a bit."</i> B	
IMPROVED	"The cleanliness of the city has improved." E	
CLEANLINESS:	"It's cleaner than it used to be." E	
	"They have cleaned up our city." N	

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

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

TOPIC	ILLUSTRATIVE VERBATIM QUOTES	
IMPROVED MIX: Housing / Shopping / Working	 "It's great to be able to work, live, and play in Downtown." N "It's a good place to work and live now." N "The new high rise condos." N "I like living downtown." N "There are some really nifty apartments that have gone up." N "Good mix of residences and businesses downtown." E "I like that Downtown is more of a living area now." P "It's interesting to work downtown." N "More stores and shops." P "All the shopping that's available now." B "I really enjoy shopping downtown." N "It's a great shopping area." P "It's a beautiful skyline." N 	
SIZE / WALKABILITY	"Everything is within walking distance." E "You can walk everywhere now that there is shopping." B "It's easy to walk around on foot. In fact, I prefer it." N "I don't mind walking around downtown any more." N	

Areas of concern / for improvement most frequently mentioned:

- Parking
- Traffic Flow
- Transportation Planning / Mass Transit
- Construction*
- Excessive Density / Growth
- > Attention to Environment, Parks, and Green Spaces

* Indicates a new "Area of Concern" in 2011

Note: Analysis based on all stakeholder groups.

Note: Parking has been mentioned as a weakness for many years. Traffic and transportation have also been sources of concern in the past. In 2011, comments focused more specifically on inadequacies in transportation planning and insufficient public transportation options.

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?

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
PARKING: Availability & Cost	The parking problems persist." N "Parking is the weakest link." N "You pretty much can't find parking anywhere." B "Parking is too expensive." P "It costs too much to park downtown during the week." B "We need more affordable parking." N "Fix the parking problem." P "I hate to see more parking garages go up, but I think we need them." P "I don't park there anymore because it's too expensive." E "Parking sucks so bad that I don't even drive anymore." N "I walk as much as I can because of the parking problems down there." N

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?

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
TRAFFIC FLOW:	"The traffic problems are a mess every day." B "Figure out how to fix the traffic situation." B "I wish they could do something about the traffic coming into Downtown." P "Both getting into and around Downtown is difficult." B "The traffic is worse every year." E "The traffic is too much for me to handle." N "It's very hard to drive in Downtown Austin." N "There are too many pedestrians and bicyclists, making it hard to drive downtown." N
TRANSPORTATION PLANNING / MASS TRANSIT:	"Transportation planning seems to be lagging." P "The mass transit system needs to be overhauled." E "They need to come up with other forms of mass transit." B "The mass transit system still needs vast improvement." B "The train system so far is a joke." P "They need to put the transit plan on the fast track." N "The mass transit authority isn't moving fast enough." P "Until there is rail throughout the city, traffic will be bad." P "They should work on trying to get people to use public transportation." E "They should try to get more people to take buses." B

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?

ΤΟΡΙϹ	ILLUSTRATIVE VERBATIM QUOTES	
CONSTRUCTION: Traffic diversion, environmental impact	"The construction zones." N "I don't like all the construction." N "Too much construction going on at once." B "The construction projects seem to be endless." N "The construction projects that block traffic." P "There is always some construction blocking my way to work." E "The construction creates a lot of dust and noise." B	
EXCESSIVE GROWTH: Loss of Unique Character (People, Environment, History)	"There's growth at an alarming rate." N "I don't really like the way the city is expanding so rapidly." P "We're running out of room downtown." P "They shouldn't be trying to get more businesses to move downtown." E "I worry that Austin is getting too large." N "People aren't as friendly as they used to be." P "Stop trying to turn this into another Dallas or Houston. No one wants that." N "I would rather see them focus more attention on the historical landmarks of the city." E "I'm afraid that the city's historical sites will be compromised due to the growth	
	oortant weaknesses or shortcomings of the downtown area? commendations about activities the DAA should pursue?	

TOPIC	ILLUSTRATIVE VERBATIM QUOTES			
	"More tree plantings." N			
	<i>"Invest more in the parks."</i> N			
ATTENTION TO	"Too much concrete." N			
	"More parks and green spaces please." N			
ENIVIRONMENT,	"More money spent on parks and recreation." E			
PARKS AND	"They really should add some landscaping to some of the green areas." E			
GREEN SPACES:	"I think that the parks should receive more money from the city." E			
Environmental Problems	"I wish they would improve the parks Clean them up more and add more lighting." N			
FIODIEIIIS	"Wildlife preservation." N			
	"Protect the environment in and around the downtown area." E			
	"I'd like to see more open spaces for the public." E			

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?

Transportation To & Within Downtown

Mode of Transportation		Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100
	Own Vehicle	61%	71%	79%
	Car Pool	23%	11%	6%
Downtown Commute	Public (Bus & Train)	12%	10%	6%
	Walk	3%	6%	5%
	Bike	1%	2%	4%

	Own Vehicle	40%	39%	51%
Within Downtown	Public	23%	17%	17%
	Walk	29%	39%	26%
	Bike	1%	1%	2%

Average \$ Spent / Month on Parking	Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100
Nothing	25%	42%	32%
<\$50	50%	31%	41%
\$50-\$74	7%	15%	10%
>\$75	20%	12%	17%

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

How do you most often commute to and from Downtown? Do you <drive your own vehicle, car pool or van pool, take the bus, take the train, walk or ride a bicycle>?

How do you typically get around within the downtown area? Do you <drive your own vehicle, use Car 2 Go, take public transportation, walk, ride a bicycle, or something else>?

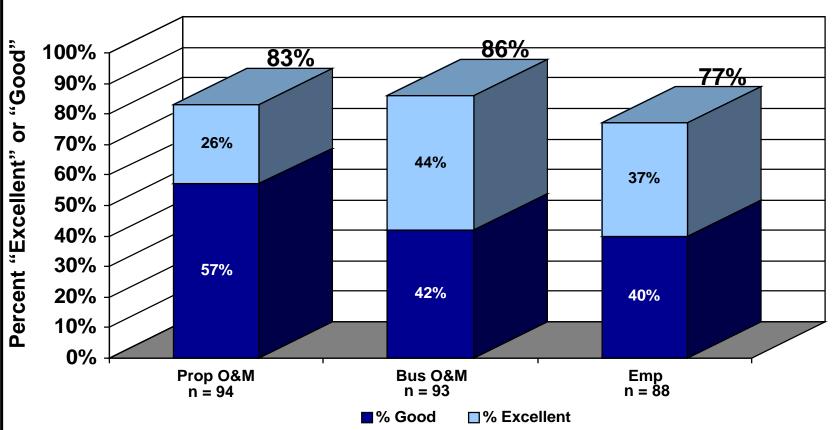
Summary - Perceptions of Downtown

What's new in 2011?

Changes in perceptions are revealed in answers to the openended questions. New findings in 2011 are:

- > Downtown is considered both safer and cleaner.
- Improvements in parks and tree plantings are enthusiastically noted.
- Improved mix is also noted, especially improvements in shopping.
- Interest in historical preservation, and to a lesser extent, environmental concern is more salient.
- Frustrations with transportation now include a call for improved planning and expanded public transportation options.

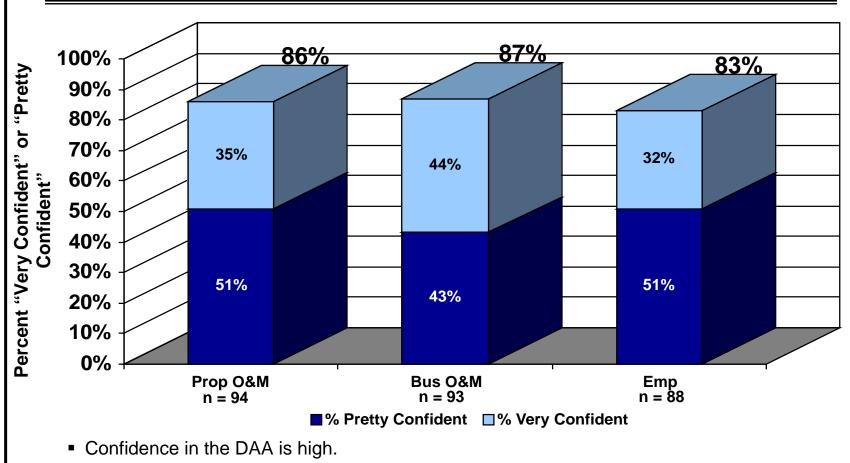
Overall Evaluation of the DAA



- The vast majority of each stakeholder group believe that the DAA is doing an "excellent" or "good" job, consistent with 2009 results.
- Between 3 and 6% of each group think the DAA is doing a poor job.

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?

Confidence in the DAA



Note: This question was asked for the first time in 2011.

IF VERY, SOMEWHAT OR NOT SO FAMILIAR <with the DAA>: How confident are you that the DAA does the right things for Downtown Austin? <Very confident, pretty confident, somewhat confident, or not <u>at all confident></u>

Importance of DAA Activities Going Forward

	2011 Mean Ratings		
	Prop O&M n=100	Bus O&M n=100	Emp n=100
Sidewalk Improvement & Tree Planting	8.6	8.5	8.3
Facilitating Development of Downtown Housing	8.4	8.0	8.3
Taking a Leadership Role in Downtown Transportation Planning	8.3	8.2	8.1
Working with City to Reduce the Impact of Street Closures	8.3	7.7	7.9
Increasing Security in Downtown	8.2	8.1	8.1
Pursue Wayfinding Measures	8.1	8.4	8.1
Advocating for the Development of Arts and Culture in Downtown	8.0	8.1	8.5
Improving the Appeal and Use of East 6 th Street	8.1	7.9	7.9
Advocating for Revitalization of Public Parks Downtown	8.0	8.4	7.9
Working to Attract and Retain Downtown Business	8.0	8.0	8.3
Appeal, Vitality of Congress Ave.	8.0	8.0	7.8
Facilitating the Expansion of Downtown Shopping	7.9	8.3	8.1

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>?

M. CRANE & ASSOCIATES, INC.

Summary

> Overall, opinions about Downtown Austin are quite positive

- All stakeholder groups included in this research evaluate Downtown favorably on nearly every dimension -- including safety, cleanliness, visual appeal, and amenities.
- The vast majority think Downtown is going "in the right direction."
- Its character is considered exciting and inviting. It's a friendly and historically interesting place. There is consensus that the downtown area is "a community" and "the heart of Austin."
- Stakeholders identify many different strengths. They place great value on its vitality, especially the wide array of arts and cultural offerings and events. They enjoy the atmosphere which they describe as energetic, informal and diverse. They applaud improvements in parks and green spaces as well as improvements in cleanliness and safety. They welcome the increased variety in the downtown mix. And they consider Downtown more "walkable," likely a result of its increasing vitality.

Summary

- The most notable exception to the prevailing positive sentiment is transportation
 - Though many respondents welcome the increased attention to transportation challenges, they also continue to complain about ingress and egress and, to a somewhat lesser extent, mobility within Downtown.
 - Frustration levels are high. They call for increased transportation options and for mass transit solutions – now.

Other concerns are:

- Parks & green spaces though some recent improvements are noted, the plea for more attention to parks, green spaces, and environmental protection is louder than ever.
- The **distinctive history and character** stakeholders:
 - comment on the importance and value of maintaining historic sites
 - and express concern about becoming too much like other large cities.

Summary

The DAA is viewed favorably

- Confidence in the DAA is high.
- And, more than 80% of Property Owners & Managers and Business Owners & Managers believe the DAA is doing an "excellent" or "good" job.
- The enthusiasm expressed about Downtown Austin and perceptions of its increasing vitality provide compelling evidence that the DAA is effectively advancing its mission.

	Downtown Austin Alliance					
	Implications					
-	A high bar has been set. Downtown Austin has seen continuous improvement for the duration of the DAA's existence. In 2011, stakeholders are very enthusiastic about Downtown. That said, their expectations are much more likely to increase than decline.					
	Collaborative leadership is key. The success of Downtown has been and will continue to be the result of the effective collaboration of many entities. The adoption and implementation of the Downtown Plan will create expanded opportunities. New alliances and collaborations, including public-private partnerships, are likely to take on increasing importance. DAA's mission and leadership role should remain priorities.					
	Transportation improvements. There is no area for improvement that matters more to these stakeholders.					

Appendix

Respondent Profiles by Group

		Prop O&Ms n=100	Bus O&Ms n=100	Emps n=100	NBRs* n=250
Condor	Male	43%	36%	40%	41%
Gender	Female	57%	64%	60%	59%
	<35 years	27%	25%	33%	28%
Age	35-55 years	s 48%	52%	44%	49%
	>55 years	25%	22%	22%	23%
		Owned or Managed Business in Downtown Austin	Owned Manage Busines Downtown	ed s in	Worked in Downtown Austin
Mean Number	of Years	9 years	8 year	S	8 years

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?

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.