

# ***Assessment of Downtown Austin and the Downtown Austin Alliance***

## **Biannual Tracking Survey Presentation Handout**

**October 6, 2005**

## Executive Summary

For a decade, the Downtown Austin Alliance (DAA) has monitored the views of three segments biannually -- Property Owners and Managers, Business Owners and Managers, and Downtown Employees -- to gain an ongoing understanding of their assessments of Downtown Austin, in general, and the DAA, in particular. In 2005, Nearby Residents are added to this biannual tracking study, enabling the DAA to gain a fuller understanding of stakeholders' perceptions and assessments.

**In 2005, 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 they observe that Downtown Austin has continued to improve in every regard, with the notable exceptions of transportation and parking.

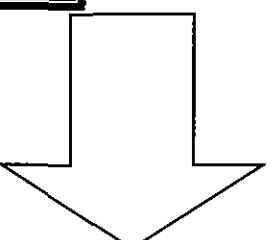
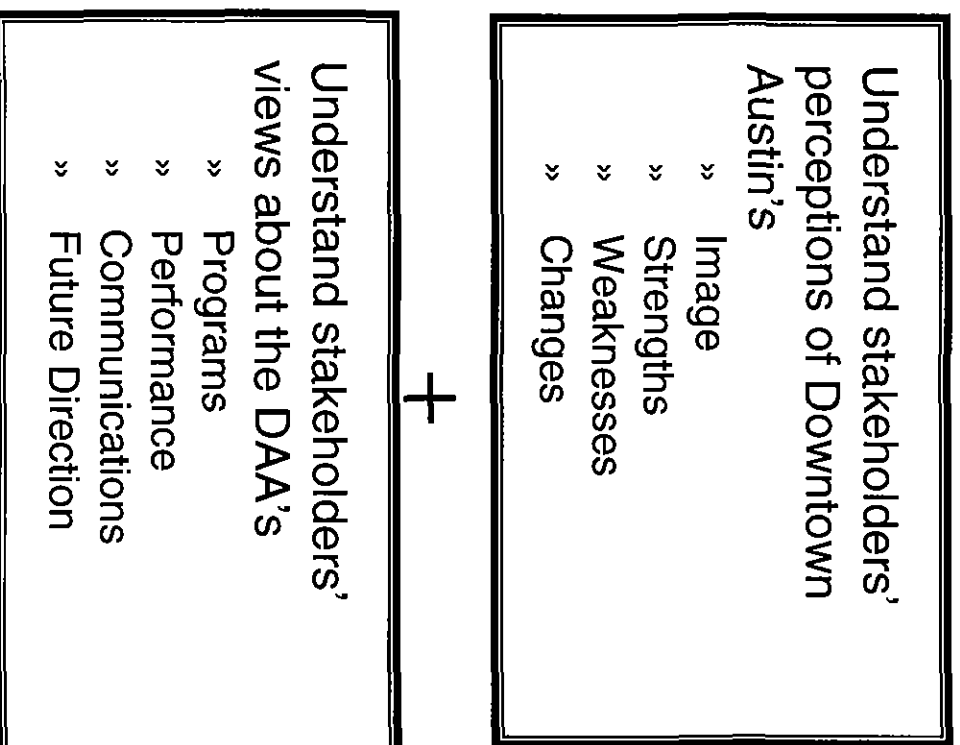
With respect to the DAA, in particular, awareness has increased among Downtown Employees. Property Owners and Managers, Business Owners and Managers, and Downtown Employees **continue to evaluate the DAA's programs and communications -- including the new TV series "DOWNTOWN" -- quite favorably.** Though 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.

# **Executive Summary**

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, going forward, it will be especially important for the DAA to:

- Continue to focus on downtown beautification
- Continue to address concerns about availability and affordability of parking
- Collaborate to implement solutions to traffic problems
- Continue to develop and manage the Downtown Austin “Brand”
- Increase penetration of DAA communications with stakeholders

# What is the Purpose of this Study?



**To establish stakeholder driven priorities for Downtown Austin and the DAA**

# Research Methods

## Telephone Interviews with Downtown Stakeholders

Property Owners & Managers (Prop O&M)	83
Business Owners & Managers (Bus O&M)	100
Downtown Employees (Emp)	100

*Included in 1995 – 2005, biannual tracking studies*

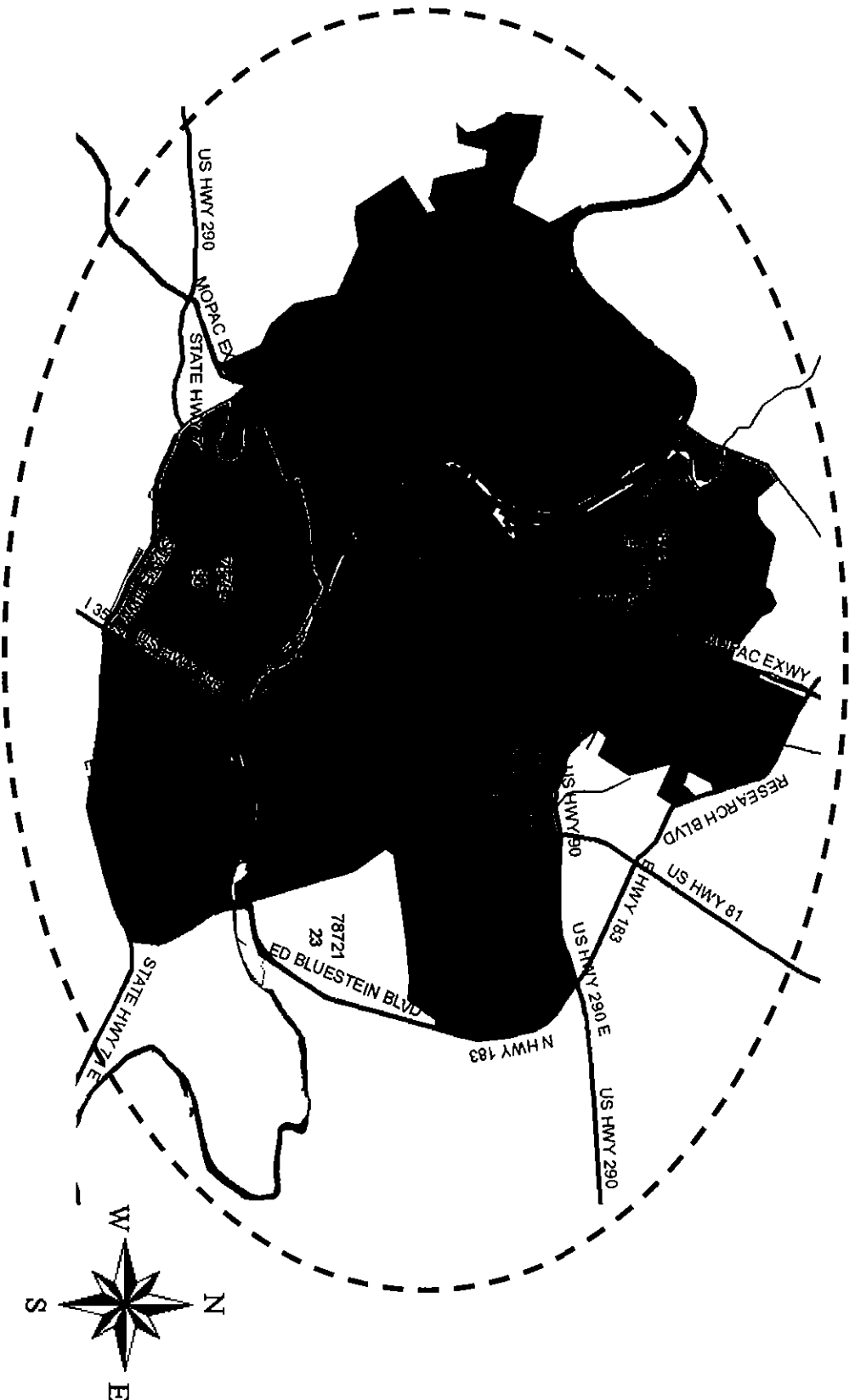
Nearby Residents (Resid)	501
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*Included in 2005 for the first time*

Total Number of Interviews	784
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Nearby Residents and Downtown Employees were selected using a Random Digit Dialing method to obtain a representative sample of households within the following zip codes: 78701, 78702, 78703, 78704, 78705, 78721, 78722, 78723, 78731, 78741, 78746, 78751, 78756, 78757. Nearby Residents reside in households in which no one works downtown.

# Nearby Residents



# Respondent Profiles by Group

	Prop O&M n=83	Bus O&M n=100	Employees n=100	Residents N=501
Gender	Male	53%	44%	47%
	Female	47%	56%	53%
				60%

Age	<35 years	28%	30%	42%	35%
	35-55 years	50%	44%	36%	42%
	>55 years	22%	26%	21%	23%

Years own property / business / work in Downtown Austin	<4 years	19%	21%	20%	NA
	4-5 years	20%	15%	20%	
	6-10 years	25%	27%	20%	
	>10 years	35%	27%	39%	

Commute <16 Minutes to Downtown	71%	82%	72%	100%
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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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# Outline of Key Findings

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## I. Perceptions of Austin's Downtown Area

- » Overall Evaluation of Downtown
- » Evaluation of Downtown Compared to 3 Years Ago
- » Image of Downtown
- » Strengths of Downtown
- » Weaknesses of Downtown

## II. Perceptions of the DAA

## III. Summary and Recommendations



# Overall Evaluation of Downtown Austin

	2003	2005			
	Overall Mean*	Prop O&M n=83	Bus O&M n=100	Emp n=100	Resid n=501
Commute to Downtown	NA	8.5	8.9	9.0	8.9
Safety during the day	8.6	8.7	8.8	8.6	8.6
Interesting places and things	8.4	8.5	8.2	8.4	8.4
Cleanliness of streets and buildings	8.4	8.3	8.6	8.1	8.4
Getting Around Downtown	NA	8.4	8.3	8.3	8.2
Visual appeal	8.1	8.0	8.1	8.3	8.2
Desirable place to shop	NA	8.0	8.2	7.9	8.0
Safety during the night	7.7	7.8	7.5	7.5	7.7
Desirable place to work	NA	7.6	8.1	7.9	7.8
Desirable place to live	7.6	7.2	8.0	7.5	7.7

\*Based on all three stakeholder groups (Prop O&Ms, Bus O&Ms, and Emps) combined.

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>?

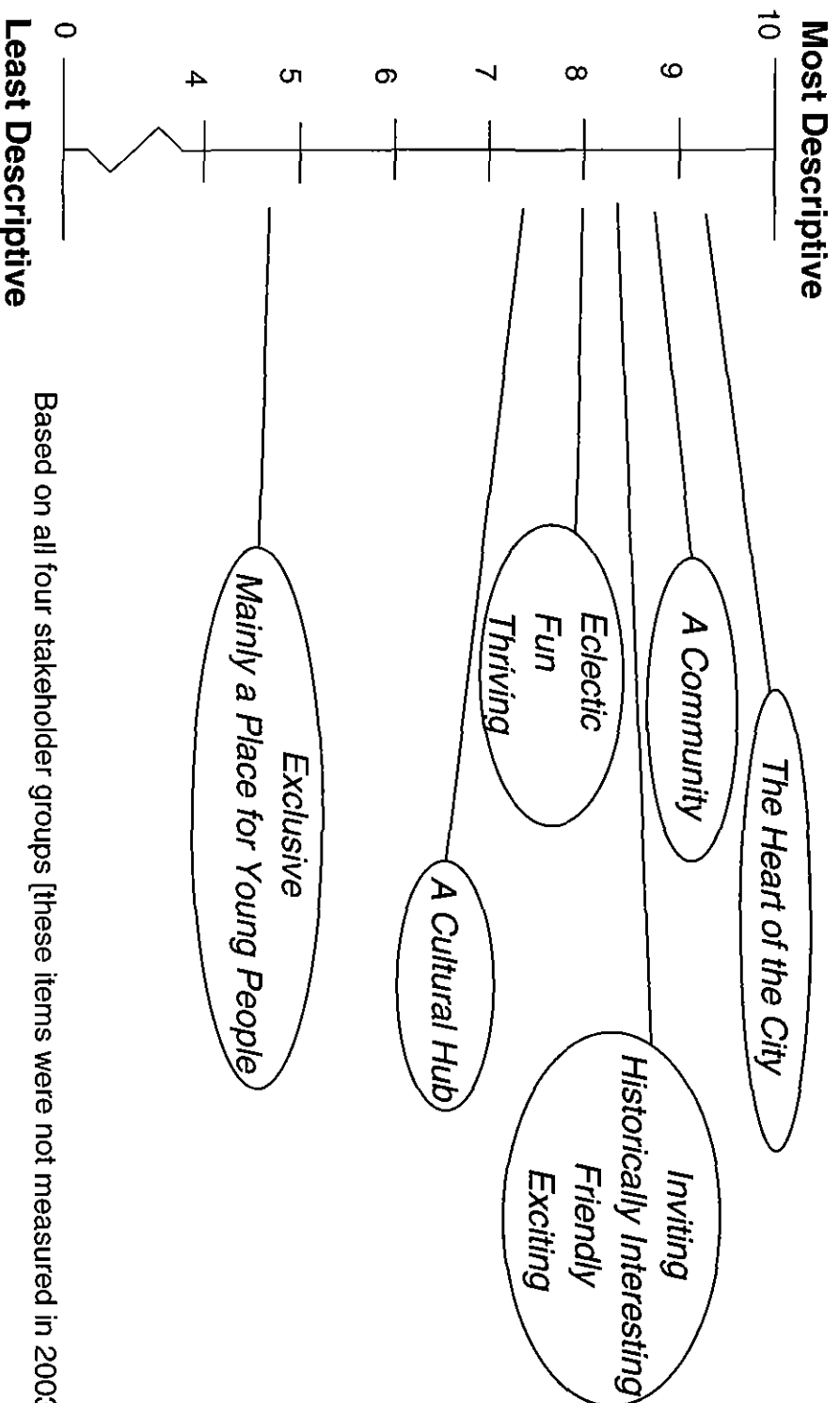
# Evaluation of Downtown Compared to 3 Years Ago

	2003				2005							
	All Groups		Prop O&M n=83		Bus O&M n=100		Employees n=100		Residents n=501			
	% Better	% Worse	% Better	% Worse	% Better	% Worse	% Better	% Worse	% Better	% Worse	% Better	% Worse
<b>Much Better</b>												
Interesting places and things	62%	9%	72%	8%	65%	11%	57%	5%	63%	9%		
Safety during the day	63%	8%	60%	5%	72%	3%	58%	13%	65%	7%		
Desirable place to shop	NA	NA	68%	10%	58%	11%	65%	14%	64%	10%		
Desirable place to live	61%	11%	63%	12%	66%	8%	64%	7%	61%	10%		
Visual appeal	62%	8%	65%	4%	64%	10%	58%	10%	60%	8%		
<b>Better</b>												
Safety during the night	58%	10%	61%	5%	63%	10%	55%	11%	58%	10%		
Cleanliness of streets and buildings	60%	10%	58%	11%	67%	5%	54%	12%	59%	11%		
Desirable place to work	NA	NA	42%	7%	53%	5%	60%	5%	54%	6%		
<b>Not Better</b>												
Getting Around Downtown	NA	NA	42%	12%	37%	19%	41%	14%	40%	16%		
Commute to Downtown	NA	NA	23%	16%	22%	14%	22%	15%	23%	14%		

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



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.

# Image of Downtown

	Property O&M n=83	Business O&M n=100	Employees n=100	Residents n=501
The Heart of The City	9.1	9.3	9.4	9.3
A Community	8.5	9.0	8.8	8.7
Historically Interesting	8.2	8.7	8.5	8.4
Inviting	8.6	8.4	8.3	8.3
Friendly	8.2	8.4	8.5	8.4
Exciting	8.1	8.6	8.0	8.3
Eclectic	8.4	7.8	7.7	8.0
Fun	7.5	8.4	7.9	7.9
Thriving	8.1	7.8	7.8	8.0
A Cultural Hub	7.1	7.5	7.6	7.4
Mainly a Place for Young People	5.3	4.6	5.1	4.9
Exclusive	5.2	4.9	4.1	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.*

## 3 Predominant Strengths of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
AMUSEMENTS: Arts / Culture / Entertainment / Special Events	"All the fun things for adults and kids to do." "There is always something going on." "To me, the music festivals are the best part." "They hold some really cool festivals down there." "Freebies like concerts and cultural fairs." "All of the music and theaters." "All of the art galleries and museums." "The fact that it is becoming a major culture center for Austin." "The nightlife."
NATURAL ENVIRONMENT: Parks / Green Space	"The parks are the best part of downtown." "The historical parks." "Town Lake area - parks and wildlife there." "Hike and Bike Trail at Town Lake." "The attention to the parks."
THE ATMOSPHERE: Energy / People / Attitude / History / Sense of Place	"Great place to live and work." "Great atmosphere. People's attitudes." "Lots of friendly people." "Austinites make this city what it is -- great." "Preserving the history of Austin and the area." "The fact that Austin is such a historical city." "Lots of people coming together to make downtown a success."

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

## 5 Weaknesses of Downtown

TOPIC	ILLUSTRATIVE VERBATIM QUOTES
INADEQUATE PARKING	"Downtown's weakness is the parking problem." "Parking is a killer." "Parking is a major problem." "The parking situation is ridiculous." "Not enough parking to sustain the people." "Find a solution to the parking problem." "Create more parking." "We really need to have more parking garages built downtown." "I'm sure that they know it, but they need more parking."
TRAFFIC / TRANSPORTATION	"The traffic is always backed up." "The streets have improved but the traffic has not." "The traffic coming in to Downtown Austin [is a weakness]." "We need better public transportation." "We need a solution to the transportation problem. We need mass transit." "We need a train." "Try to get the city to decide on the light rail system."
NATURAL ENVIRONMENT Park Maintenance / Protecting Green Space / Pollution	"Too much concrete; not enough green." "The landscaping of the Town Lake Area [is a weakness]." "Air pollution has gotten worse." "We need to go back to our focus on the environment." "We need to make better use of our natural resources." "More trees and landscaping need to be added." "Maintenance of the parks needs improvement." "Improve the parks and recreation."

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 PRESERVATION & IMPROVEMENT OF HISTORIC / CULTURAL SITES	<i>"Preserving the city's historical sites."</i> <i>"Spend more on restoring the historical landmarks."</i> <i>"They need not to disturb any historical sites."</i> <i>"Increase funding to the arts and museums."</i> <i>"More emphasis on the cultural centers of the city."</i> <i>"Need a performing arts center built."</i>
TOO CROWDED (primarily business owners)	<i>"Population downtown has grown too much."</i> <i>"Too many people. Not enough room."</i> <i>"Downtown is becoming overpopulated."</i>

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

# Outline of Key Findings

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## I. Perceptions of Austin's Downtown Area

## II. Perceptions of the DAA

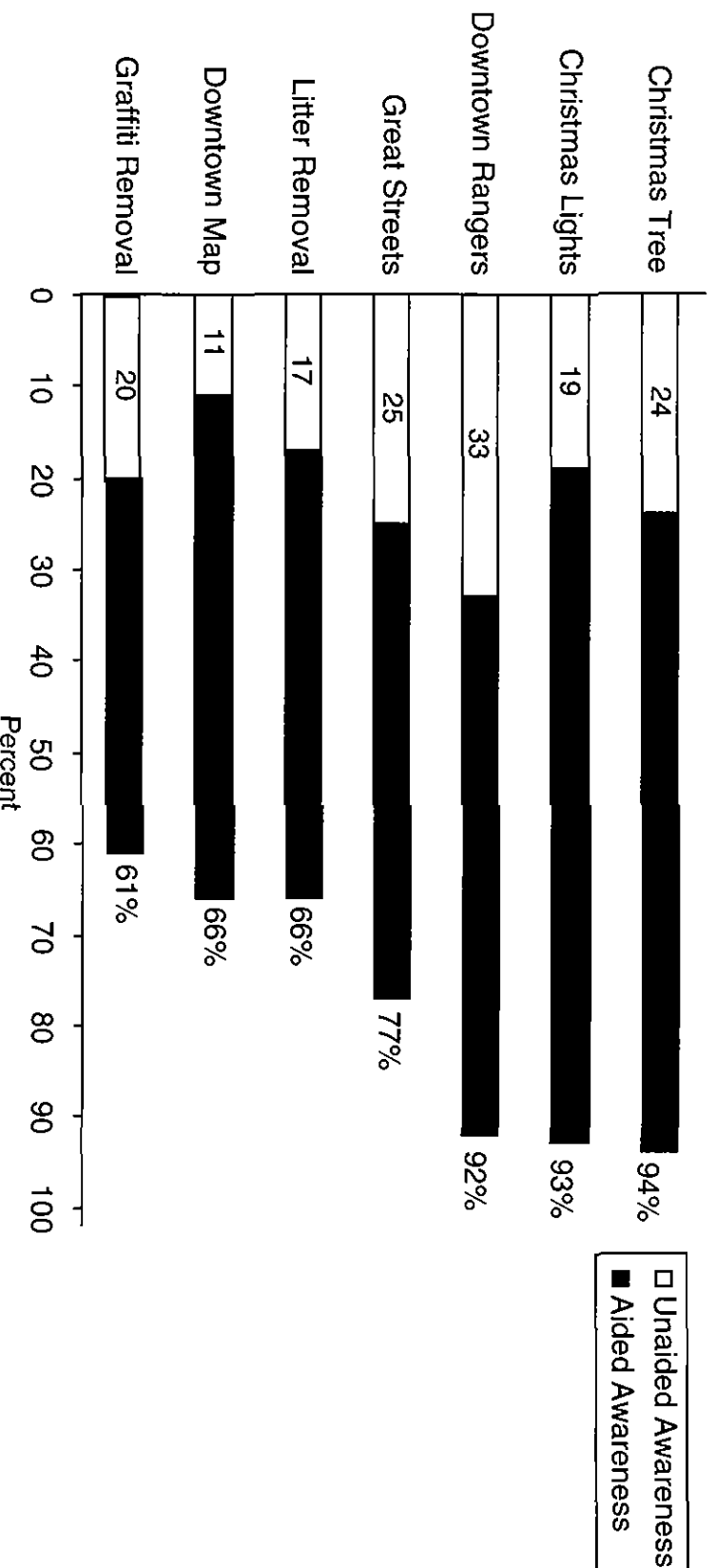
- » Awareness of DAA Programs
- » DAA Communications
- » Overall Evaluation of the DAA
- » Importance of DAA Activities Going Forward
- » Stakeholders' Suggestions for DAA

## III. Summary and Recommendations



# Awareness of DAA Programs

Combines Prop O&Ms, Bus O&Ms, Emps



- Awareness levels of DAA programs are unchanged since 2003.
- Levels of awareness among Nearby Residents are quite similar. 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>?*

# DAA Communications

Type	Specific Tool	Penetration	Evaluation
Print	Downtown Focus	Good	Very Good
	Weekly Email "This Week"	Fair	Very Good / Excellent
Electronic	Website	Fair	Very Good
	Issues & Eggs Series	Good	Very Good
	Luncheon & Speaker Series		
Events	Downtown a La Carte		

- Nearly one-third of Prop O&Ms and Bus O&Ms think they do not receive enough information from DAA. This represents an increase from 2003.
- A substantially larger portion of Emps (60%) think they do not receive enough information from DAA.

*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? The DAA sponsors <a series of programs called the Luncheon & Speaker Series; the monthly breakfast called Issues & Eggs; the monthly Building Fair called Downtown a la Carte>. 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, and Downtown a la Carte> is to you.*

*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>?*

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# DAA Communications

## How Stakeholders Become Aware of "DOWNTOWN"

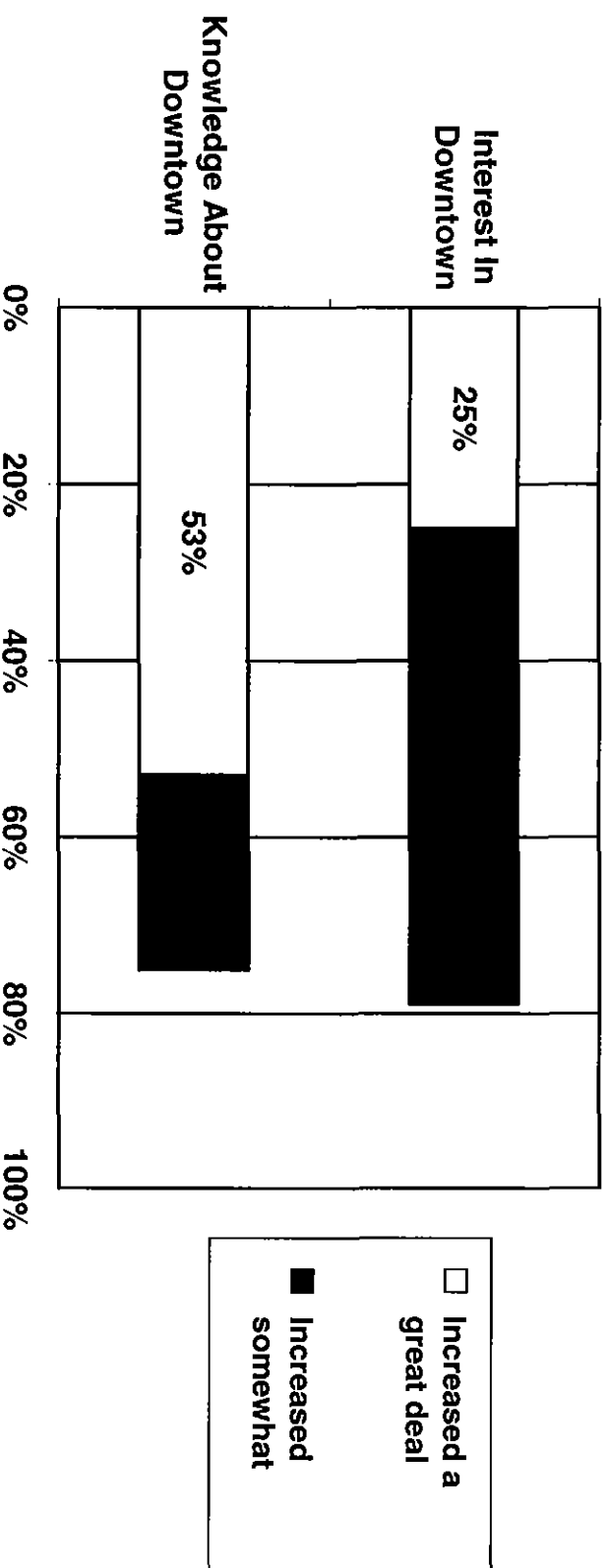
Aware and Have Seen "DOWNTOWN"		Prop O&M n=83	Bus O&M n=100	Emp n=100	Resid n=501
Aware but Have Not Seen "DOWNTOWN"		22%	20%	14%	16%
		34%	41%	40%	38%
How Become Aware of "DOWNTOWN"	TV Ads	58%	27%	47%	43%
	DAA Publications	16%	15%	17%	16%
	Billboards	4%	23%	13%	12%
	Postcards / Flyers	11%	3%	17%	11%

- The TV series "DOWNTOWN" began airing on KLRU in April 2005.
- Most are aware of the show and approximately 18% have seen it.
- TV ads are the primary source for learning about the show.

*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>?*

# DAA Communications

## Impact of Viewing "DOWNTOWN"

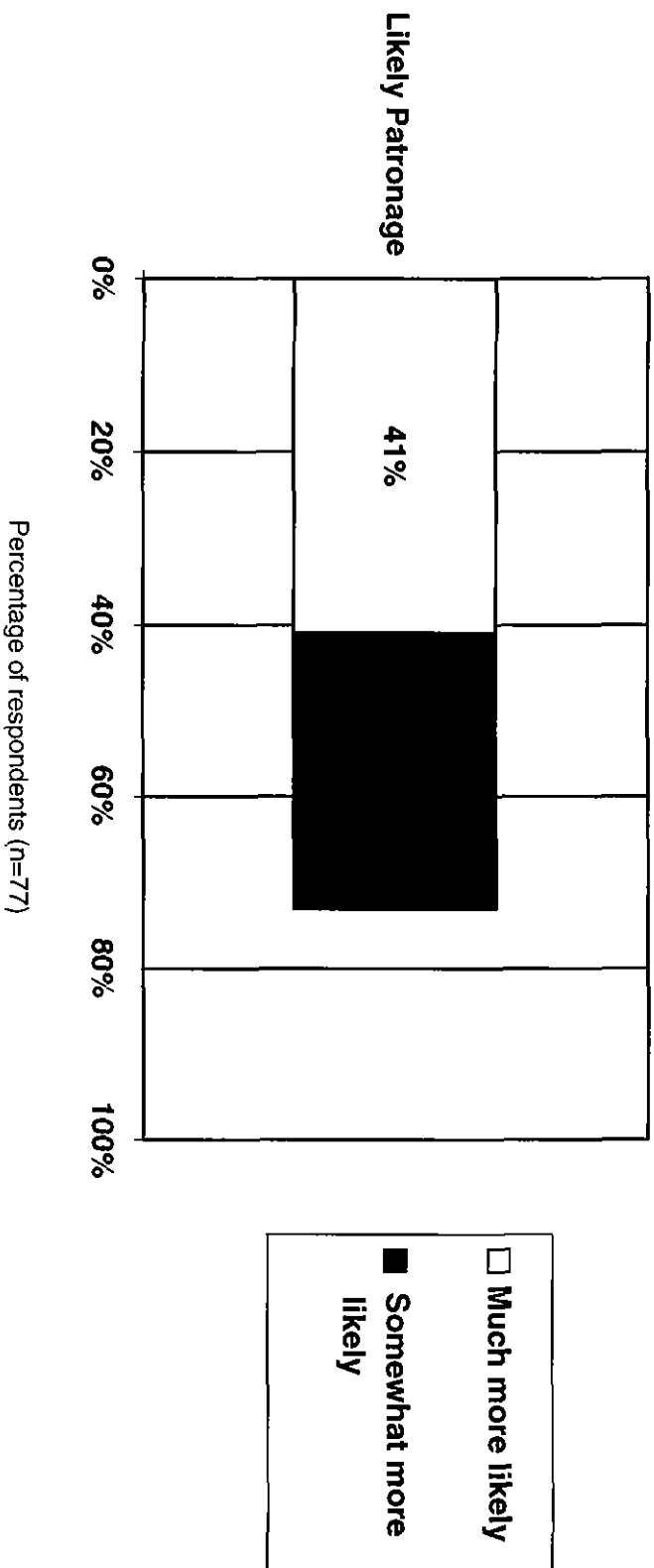


- More than 75% of respondents who have seen the show say that "DOWNTOWN" has had an impact on their knowledge of and interest in downtown.

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?

# DAA Communications

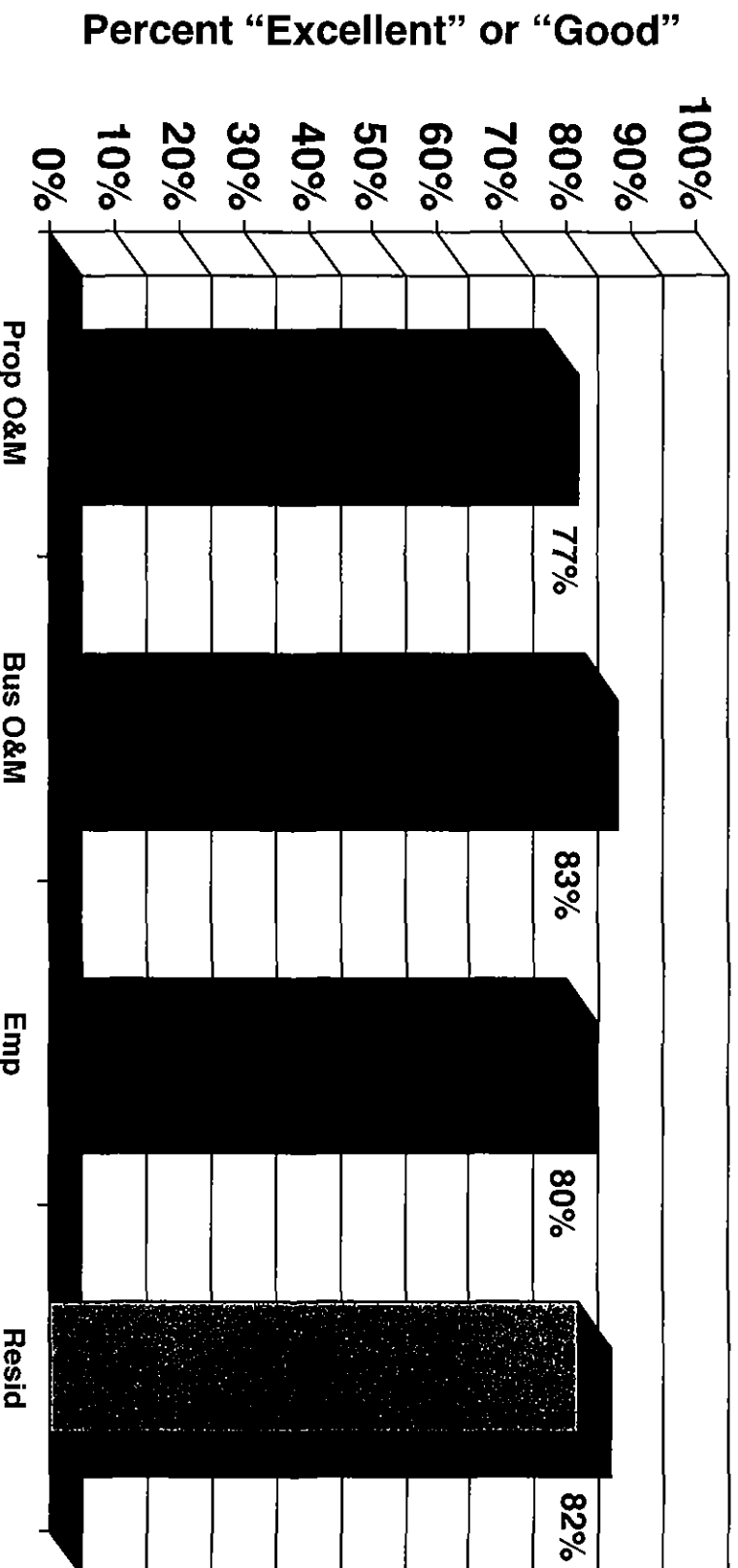
## Impact of Viewing "DOWNTOWN"



- Approximately 75% of respondents who have seen the show also say "DOWNTOWN" has made them more likely to patronize downtown.

*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?*

# Overall Evaluation of the DAA



- Approximately 80% of each stakeholder group believe that the DAA is doing an "Excellent" or "Good" 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?*

## Downtown Austin Alliance

# Importance of DAA Activities Going Forward

	2005 Mean Ratings		
	Prop O&M n=83	Bus O&M n=100	Emp n=100
Sidewalk Improvement & Tree Planting	8.5	8.3	8.3
Facilitating the Availability of more Parking for Downtown Visitors	8.3	8.3	8.2
Providing Information on DAA Website	8.5	8.1	8.0
Work to Attract and Retain Downtown Business	8.3	8.1	8.2
Increasing Security in Downtown	7.9	8.5	8.2
Work with City to Reduce the Impact of Street Closures	8.3	7.9	8.2
Promote Downtown Austin via TV	8.2	8.2	8.0
Facilitating the Expansion of Downtown Shopping	8.1	8.2	8.0
Taking a Leadership Role in Downtown Transportation Planning	8.0	8.3	7.9
Facilitating Development of Downtown Housing	8.5	7.9	7.7
Advocating for the Development of Arts and Culture in Downtown	8.0	7.9	8.2
Advocating for Revitalization of Public Parks Downtown	7.6	8.2	8.3
Improving the Appeal and Use of East 6 <sup>th</sup> Street	8.2	7.9	7.8

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 6<sup>th</sup> 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 DAA

In terms of their individual verbatim recommendations for the DAA going forward, the most prevalent themes are:

- Beautification (parks and cleanliness)

- » "I think they need to add more parks for the enjoyment of the people downtown."
- » "Take better care of our parks and green spaces."
- » "Clean up Town Lake."
- » "Fix up some of the older buildings."
- » "Need to focus on cleaning up the streets."

- Parking Access

- » "Create more parking for downtown."
- » "We've got to have more parking and at a cheaper rate."
- » "Please work on the parking problem!"
- » "If they could do something about the parking, that would be great."
- » "Help come up with a solution for both long term and short term parking."

- Transportation (planning), short and long term

- » "Help find a solution to the traffic into downtown."
- » "We need a solution to the transportation problem. We need mass transit."
- » "Get going on a mass transit system."
- » "We need a train."
- » "Try to get the city to decide on a light rail system."

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



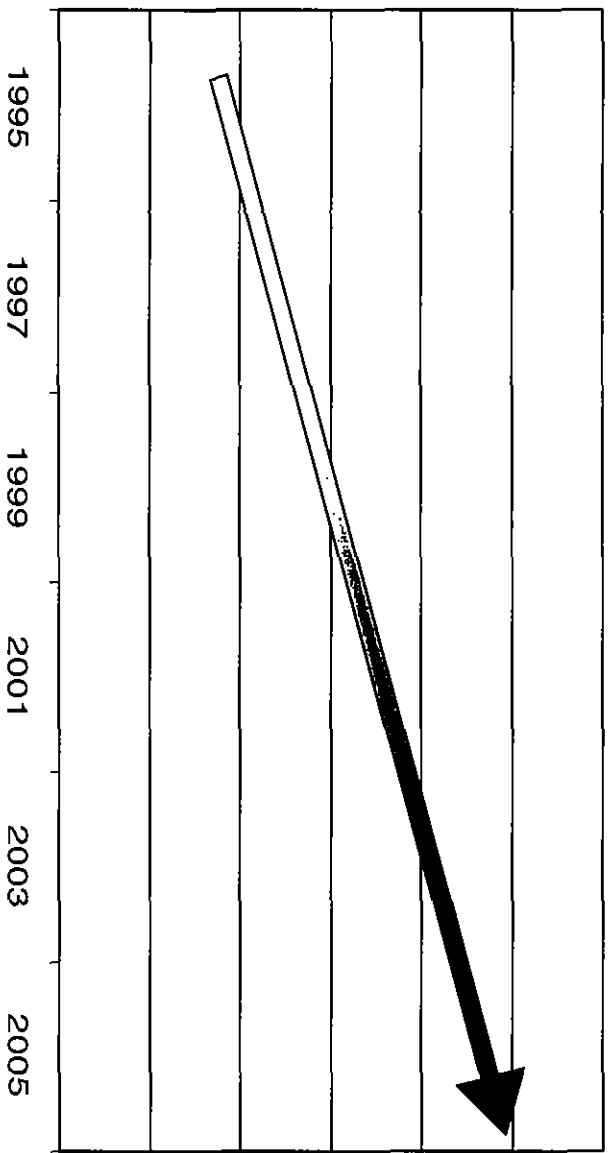
# Outline of Key Findings

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

# Summary

Downtown Austin Image



**“The Early Years”**

- Safety at Night.....~~Safety at Night~~
- Insufficient Retail.....~~Insufficient Retail~~
- Cleanliness.....Beautification
- Parking.....**Parking**
- Transportation.....**Transportation**
- .....Communication

**2005**

## Recommendations

As this is the 10 year anniversary of the initial tracking survey focusing on Downtown Austin, our first recommendation is for the DAA to stop to reflect on the dramatic improvements to Downtown Austin that have taken place in the decade between 1995 and 2005.

The findings reported herein are indicative of Downtown's current phase of development. As the economic vitality is well underway, stakeholders are both increasingly enthusiastic (describing downtown as "exciting", for example) and they are also increasingly demanding with respect to continued improvement. When asked to rate each of 13 potential areas of foci for DAA in the next few years, stakeholders assigned mean ratings between 8 and 9 (on a 10 point scale) to all 13. While most stakeholders want continued vitality, this year, for the first time, a few stakeholders (a small minority) are beginning to yearn for "the good old days".

## Recommendations

The favorable assessments indicate that the DAA should stay its current course. There are some specific areas for focused attention during the next few years:

- **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 the cleanliness of streets and sidewalks that are getting increasing use.
- **Continue to address Parking concerns**
  - » Ensure adequate availability, support affordability, and improve downtown users' and visitors' awareness of parking options.
- **Collaborate to implement Traffic solutions**
  - » Address the widespread frustrations on this nagging issue. Stakeholders appear to be increasingly enthusiastic about mass transit / light rail. Develop ways to build consensus on solutions and support their implementation.
- **Continue to develop and manage the Downtown Austin "Brand"**
  - » The image of Downtown as "the heart of the city", "a community", "exciting", "inviting", "friendly", and "historically interesting" are valuable intangible assets. Expect to defend and protect the desired brand image.
- **Increase Communication with Stakeholders**
  - » Increased vitality builds increased interest in / demand for information. Address the growing challenge of ensuring that all stakeholders, including Prop O&Ms and others (e.g. visitors, students) are familiar with the offerings of Downtown Austin and the DAA. Continue to develop and air the TV show "DOWNTOWN" as early indications suggest that it is having a positive impact.

## 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 active in community service and has participated on numerous community boards, including the Capital Area United Way, SafePlace, and Seton Healthcare Network.