



# DOWNTOWN AUSTIN

## A COMMUNITY SURVEY

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Prepared for the Downtown Austin Alliance

By M. Crane & Associates, Inc.

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# ABOUT US

**M. Crane & Associates, Inc. is an Austin, Texas based consulting firm with a 25 year history of conducting market and opinion research, guiding marketing and branding research and strategy, and facilitating strategic direction and change for organizations and collaborations.**

The company founder, Marie Crane, Ph.D. University of Michigan, was trained and taught at the world renown Survey Research Center. In addition to her consulting practice, Dr. Crane has been a professor at the University of Texas and has served in leadership roles in more than a dozen national and community-based not for profit organizations.



# BACKGROUND

To support the development of a new Downtown Austin Vision, a robust Community Engagement effort was undertaken. The full scope of the Community Engagement includes focus groups, executive interviews with community leaders, a variety of community workshops, and a community survey. The entirety of the engagement was intentionally designed to incorporate a range of approaches, each with distinct and complementary objectives, strengths, and limitations.

## PURPOSE

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The purpose of the Downtown Austin Community Survey was to gain an understanding of a very large number Central Texas adult residents' perspectives about downtown. The survey was designed to capture residents' assessments of downtown today, their usage patterns, and their ideas about changes that would make downtown better in the future.



# KEY SURVEY FINDINGS



## OVERALL, DOWNTOWN IS VIEWED FAVORABLY

Broadly speaking, respondents hold quite favorable opinions about downtown. **The vast majority (70%) say they either love downtown (22%) or like it a lot (48%).** In contrast, a small minority (only 10%) reported that they dislike downtown. The characteristics that respondents consider the particular strengths of downtown are that it's **the heart of the city**. It's **fun, thriving, and offers lots of interesting places to go and things to do**. And it's a **good place for live music**. Respondents consider downtown to be **essential to Austin's character**. They are **proud of Austin's downtown** and consider it **an essential place for taking out of town visitors**.



## BUT A FEW ASPECTS ARE VIEWED RATHER UNFAVORABLY

Despite the prevailing positive sentiment, respondents give downtown **relatively low marks** for **affordability, being family friendly, and being "a place for everybody."** They also give downtown relatively low marks for **night time safety** and as **a place to shop**.



## IMPROVEMENTS COULD POSITIVELY IMPACT DOWNTOWN'S FUTURE

Respondents want to retain the positive aspects of downtown and address current challenges. When asked about future needs, they call for improvements to downtown **mobility** and solutions to the complex challenges of **homelessness**. They seek assurance that growth and prosperity will not altogether displace **affordable** pleasures. They want to retain and expand **green spaces** and seek lively, welcoming, and engaging experiences in the public realm. They want to protect and enhance downtown Austin's distinctive and **authentic character** – ensuring that it will remain a one of a kind place that is welcoming to all. They want to continue to claim and be part of this "heart of the city."

# APPROACH

To facilitate widespread participation, a computer assisted self-administered online (opt in) survey was conducted.

*\* PUBLICITY. The Downtown Austin Alliance publicized and promoted participation in the survey. In addition to contacting churches and other community groups directly, ads were placed in various newspapers including Ahora Si, and advertising campaigns were run with Cap Metro and Univision. Several local news outlets covered the engagement process in print, broadcast, and online, including Community Impact, Austin Chronicle, the Austin American-Statesman, Spectrum News, KWKT, KLBJ and KXAN. Additionally, social media posts and ads in English and Spanish played a large part in promotion of the survey and other events.*

## + METHODOLOGY

*The guidelines for the methodology were as follows. The survey was intended to:*

- Be accessible online by computer and smart phone
- Offer an engaging user experience that is visually interesting, clear, and easy to complete
- Be short, requiring, on average, between 5 and 8 minutes to complete
- Be available in both English and in Spanish
- Be widely publicized to enhance participation\*
- Be accessible for a 4-week period from late September until late October, 2017
- Include a mix of closed-ended and open-ended questions
- Gather input from at least 2,000 residents of the Central Texas area

Each of these objectives was met.

**A note about methodological limitations.** *Opt-in surveys -- in which respondents proactively participate at their own discretion and convenience -- have some advantages and some limitations compared to other survey methods. The limitations of opt-in surveys include the potential self-selection bias that may result in survey samples that are not representative of the larger population. For these reasons, even in light of the large number of survey participants in this instance, the findings should always be interpreted with care. During the analysis phase of this research, extensive analyses were conducted to investigate whether there are differences in findings as a function of demographic characteristics (age, length of residence, race/ethnicity, education, gender, household income, presence of children in the household). Though very few differences emerged, those that were found are described herein.*

# 2,219

## SURVEY PARTICIPANTS

GENDER	
FEMALE	54%
MALE	46%

AGE	
< 35 YRS	28%
35- 54 YRS	40%
≥ 55 YRS	31%

RACE / ETHNICITY	
AFRICAN AMERICAN	3%
ASIAN AMERICAN	3%
HISPANIC	11%
WHITE	79%
OTHER	6%

EDUCATION	
< COLLEGE DEGREE	16%
≥ COLLEGE DEGREE	84%

LENGTH OF RESIDENCE IN AUSTIN	
< 10 YRS	33%
10 – 20 YRS	24%
> 20 YRS	45%

HOUSEHOLD INCOME	
< \$75,000	28%
\$75,000 – \$150,000	42%
> \$150,000	30%

HOUSEHOLD COMPOSITION	
CHILD(REN (1+))	22%
ADULTS ONLY	77%

Notes: A respondent is defined as area adult who completed most or all items in the survey. Excluded from the analysis reported herein are those additional participants who completed only a small portion of the survey. For most demographic variables above, “other” mentions are excluded. The Ns vary for each item due to item nonresponse.





# SURVEY RESULTS

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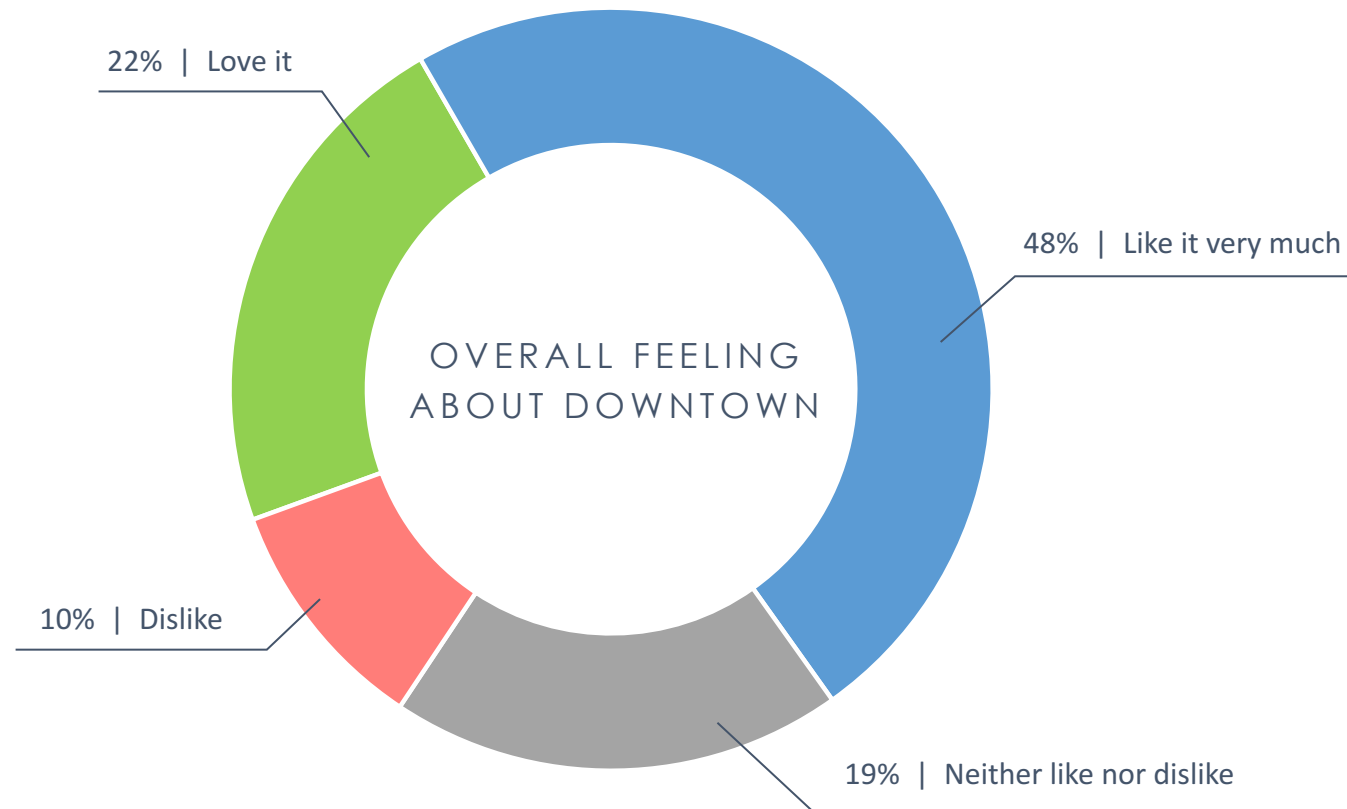
➤ PERCEPTIONS & OPINIONS ABOUT DOWNTOWN TODAY ◀

CURRENT PATRONAGE

ASPIRATIONS FOR THE FUTURE



## VAST MAJORITY OF RESPONDENTS (70%) EITHER LOVE DOWNTOWN OR LIKE IT VERY MUCH



### QUESTION WORDING

*"Taking everything into account, which statement comes closest to the way you feel? I love downtown, I like downtown a lot, I neither like nor dislike downtown, I dislike downtown."*

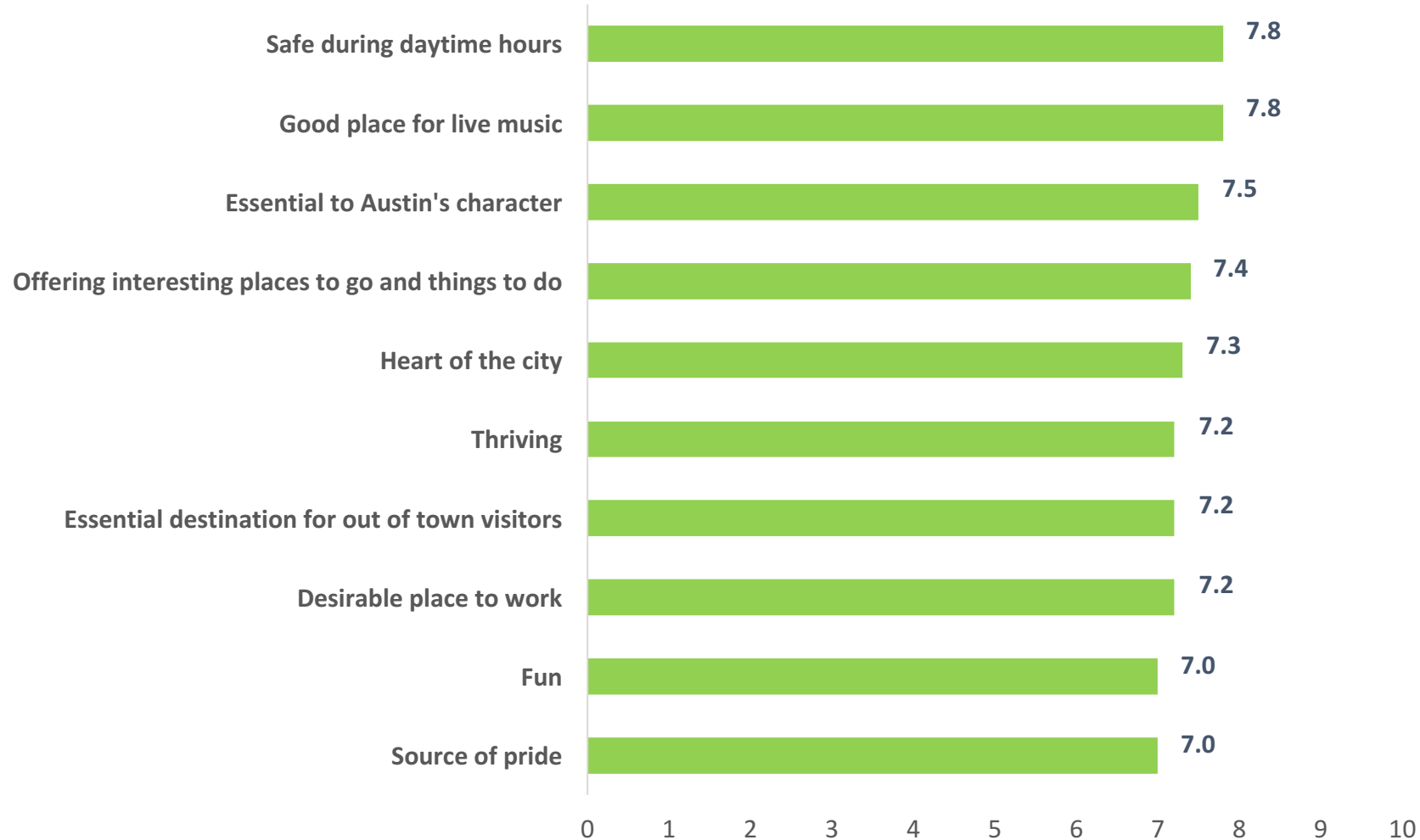
N = 1,968

Analysis of detailed findings (not shown here) reveals no difference in this overall measure of feelings about downtown as a function of age, race/ethnicity, household composition, education, gender, household income, or length of residence.





## SURVEY RESPONDENTS GIVE DOWNTOWN AUSTIN HIGH MARKS IN TERMS OF



### QUESTION WORDING

*"Using a 10 point scale where 1 is poor and 10 is excellent, how would you evaluate downtown in terms of . . ."*

Ns range from 1,974 to 2,147



## SURVEY RESPONDENTS GIVE DOWNTOWN AUSTIN RELATIVELY LOW MARKS IN TERMS OF



### QUESTION WORDING

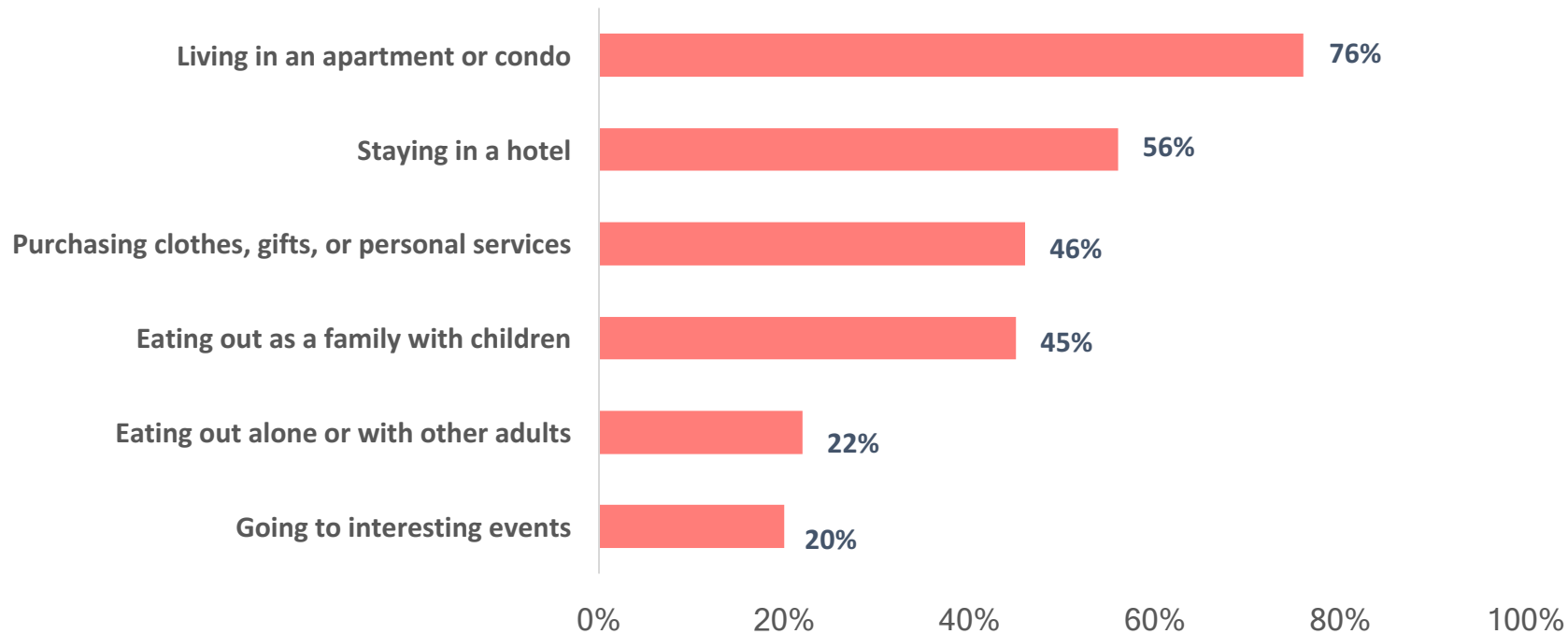
*“Using a 10 point scale where 1 is poor and 10 is excellent, how would you evaluate downtown in terms of . . .”*

Ns range from 1,906 to 2,126



## SURVEY RESPONDENTS' PERSPECTIVES ABOUT DOWNTOWN AFFORDABILITY TODAY

*Of respondents who say "not affordable"*



### QUESTION WORDING

*"How affordable is downtown when it comes to . . .? Is it very affordable, affordable, or not affordable?"*

Ns range from 2,027 to 2,055





## OVERALL, THERE ARE FEW DEMOGRAPHIC DIFFERENCES IN PERCEPTIONS OR OPINIONS REGARDING DOWNTOWN

*Detailed analyses reveal the following modest demographic differences:*

### GENDER

There are very few differences. Women, compared to men, are more likely to characterize downtown as “too expensive for me” and patronize downtown less frequently on weeknights and weekends.

### AGE

Older people consider downtown more inconvenient. Younger people generally patronize downtown more on weeknights and weekends (no difference during workday).

### RACE / ETHNICITY

There are very few differences. To the extent that there are, Hispanics hold slightly more favorable views than whites in terms of characterizing downtown as: a pleasant place to walk around; being exciting; being friendly; being a welcoming place; being a place for everybody; being an essential place for out of town visitors. They also characterize downtown as more exclusive.

### EDUCATION

There is only one small difference. Highly educated respondents are less likely to characterize downtown as “too expensive for me”.

### HOUSEHOLD INCOME

Respondents living in households with higher incomes:

- Patronize downtown more during week days and weeknights (but not weekends)
- Are less likely to describe downtown as “too expensive for me”
- Are slightly more favorable in their overall evaluation of downtown (more say “I love downtown”)

### PRESENCE OF CHILDREN

Respondents with children in their households patronize downtown less often during weeknights and weekends and they are more likely to describe eating out as a family as expensive.



## THE FACTOR MOST STRONGLY LINKED TO DIFFERENCES IN OPINION IS LENGTH OF RESIDENCE IN THE AUSTIN AREA

**People who have lived in the Austin area for a long time are rather consistently, but only modestly, less favorable with respect to several aspects of downtown.**

**Compared to others, long time area residents consider Downtown Austin to be slightly:**

- Less safe at night
- Less desirable place to live
- Less desirable place to work
- Less friendly
- Less of a place for everybody
- Less of an essential destination for out of town visitors
- More inconvenient

And they patronize downtown less frequently on weeknights and especially weekends.



# SURVEY RESULTS

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PERCEPTIONS & OPINIONS ABOUT DOWNTOWN TODAY



CURRENT PATRONAGE

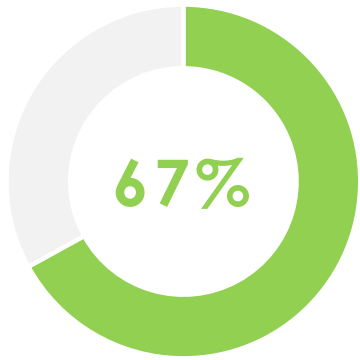


ASPIRATIONS FOR THE FUTURE

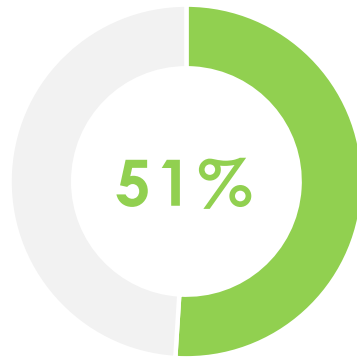




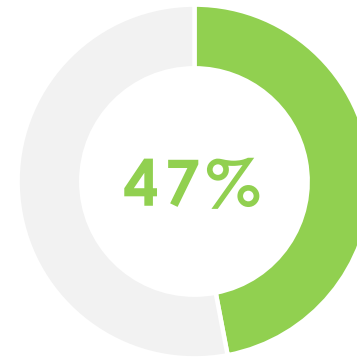
## PERCENTAGE OF RESPONDENTS WHO VISIT DOWNTOWN MORE THAN 2X A MONTH AT SPECIFIED TIMES



DURING WEEKDAYS,  
BUSINESS HOURS



DURING WEEKENDS,  
DAY OR NIGHT



DURING WEEKDAYS,  
EVENINGS

Detailed analyses (not shown here) reveal some differences among groups in terms of their frequency of their patronage. Specifically, patronage during nights and weekends is lower among:

Older people, women, those who have lived in Austin a long time,  
people in households with children, people in households with lower incomes.

### QUESTION WORDING

*“Think about your typical pattern. On average, how often do you visit a downtown business such as a restaurant, a store, or another business? During Weekdays during business hours? On weeknights? On the weekends, either in the day or night?”*

Ns range from 1,941 to 2,047



# SURVEY RESULTS

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PERCEPTIONS & OPINIONS ABOUT DOWNTOWN TODAY

CURRENT PATRONAGE



ASPIRATIONS FOR THE FUTURE





# ASPIRATIONS FOR DOWNTOWN'S FUTURE

## SUMMARY

Analysis of the open-ended questions about desires for the future of downtown reveals even more about area residents' existing concerns as well as the changes they would like to see in the future.

## QUESTION WORDING

*"In order to ensure that Downtown Austin is the best in the country, what aspects of downtown should remain just as they are?"*  
*"What improvements should be made?"*

In the context of wide-ranging input, this is the summary:

- Downtown Austin's growth and vitality are, for the most part, welcome by area residents.
- That said, their vision for the future includes more affordability, a downtown that captivates not only tourists and residents but everyone who lives in the area; they want to claim and be part of this "heart of the city."

More specifically, they hope that downtown will be:

- **Affordable** -- attracting and serving the local community at large, regardless of where people live, their race or ethnicity and their financial circumstances.
- **Easy to get to and to get around.**
- **Green, walkable, lively**, offering pleasant experiences in the public realms
- And, especially, **a distinctive and authentic place** – highlighting history and local culture and businesses
- Last but not least, they hope that the **complex problems associated with homelessness will be addressed**





The next few slides include illustrative verbatim responses that reflect the substance and flavor of respondents' visions for the future of downtown.



## DOWNTOWN AUSTIN SHOULD BE EASY TO GET TO AND EASY TO GET AROUND\*

### IN THEIR OWN WORDS

*Traffic and parking are a major deterrent for us.*

*The idea of taking mass transit to downtown isn't working. Traffic is a mess.*

*I know this is a tired subject, but parking is miserable.*

*We need active transportation, and transportation that does not require using a car.*

*Make it friendly for easy access by car and accessible, affordable parking. Transit cannot create an attractive downtown.*

*Need rail transportation into downtown to limit the amount of traffic. It is becoming less and less accessible to people who don't live downtown.*

*We need to get as many cars out of downtown as possible. Personally, I think the only vehicles that should be in downtown are mass transit, delivery vehicles, and taxis. I'd love to see a trolley system.*

*Downtown is still too automobile-centered. More effort should be made to make it pedestrian-friendly.*

*I feel like better access to rail across the city, into downtown, would be life changing for our beautiful city.*

*We need the Dillo back.*



## DOWNTOWN AUSTIN SHOULD BE AFFORDABLE

### IN THEIR OWN WORDS

***The affordability crisis is the number problem facing Austin right now.***

*Much of downtown has become financially exclusive. Our household earns over \$200K and yet we still feel like downtown often prices us out.... You pay dearly for parking, and then you pay dearly for your meal or entertainment. That is counter to Austin's culture and identity. I'd sure love to see more affordable housing and restaurants so everybody can be a part of downtown.*

***There are a ton of high-end furniture/clothing stores that seem to cater to rich people in the towers, but vibrant cities...have more amenities that appeal to the common person.***

*We would love to go downtown more but we are a middle class (probably considered upper middle class) family and honestly can't afford to participate in downtown activities.*

***Keep it funky and affordable.***

*Let's just make sure it doesn't become a theme park for the wealthy.*





## DOWNTOWN AUSTIN SHOULD BE GREEN AND WALKABLE, OFFERING PLEASANT OUTDOOR STREETSAPES, EXPERIENCES, GATHERING PLACES

IN THEIR OWN WORDS

***The Town Lake Trail is this city's jewel. Continue to improve and take care of it.***

*Lady Bird Lake and the parks around it are phenomenal. It's been upsetting to see more of these areas have free parking eliminated. The river connection is sublime and should continue to be emphasized and developed. Unfortunately, all the energy/success of the river is concentrated on the south side of river, which is not readily enjoyed by people who live/work downtown.*

***Make Shoal and Waller Creek walkable and connected.***

*Protected trees should remain. Existing tree canopy should be preserved.*

***Do NOT build anywhere that requires removal of trees or grass. In fact, add more green space please.***

*Need increased and improved parkland, including Waller Creek & Shoal Creek trails. Even small things like adding landscaped sidewalk planters can make a big difference.*

***Add attended public toilets. NYC can do it, so can we.***

*I'm worried that in the next ten years, our streetscapes are going to become cold, sterile places with towering parking garages with monolithic facades. We need to either start digging for our garages... or start ditching garages altogether and start discouraging driving downtown.*

***Anywhere where the streets are shaded and the shops / restaurants are walkable (like the 2nd St. district) are heading in the right direction.***

*Vibrancy and activity of the downtown night life. Encourage more Farmer Market and Maker Fairs. Bullock Museum, Paramount, State Theaters, Seaholm District, Red River, Hike-and-bike trails, parades, festivals, SXSW, ACL. Bremond Block, duck race, marathons, food trucks, bat watching, fun runs.*



## DOWNTOWN AUSTIN SHOULD PRESERVE AND ENHANCE HISTORIC BUILDINGS, PLACES AND CHARACTER

IN THEIR OWN WORDS

***Preserve history. Keep quirky old buildings.***

*The churches and other historical buildings should be preserved, even if they must be re-purposed to do that.*

***The historical, unique characters and assets need to be maintained and promoted.***

*The historical buildings along Congress must never be destroyed for newer, taller more revenue-producing buildings.*

*The historical, unique characters and assets need to be maintained and promoted.*

***The authentic, original buildings and homes should stay the same. It would break to my heart to come back in 10 to 15 years and see them bulldozed over just like so many have already been.***

*Downtown Austin needs to maintain its iconic structures/businesses so it maintains its character and doesn't feel just like any other central business area.*

***On Rainey Street we are seeing more and more high-rise buildings going up at the expense of the cool and unique bars that were built out of old houses.***

***I give people rides every weekend doing ride-sharing and everyone from out of town wants to go to Rainey Street. If the city continues to allow for high-rise structures to be built there, there won't be anything cool about it anymore.***

*Downtown has erased the most distinctive characteristics of Austin—its past. Austin must do what it can to restore and resurrect that which has made us unique, and avoid the homogenization that seems to typecast so many American cities.*

***I've lived downtown since the 80s, and the only bad thing that has been happening has been destroying historical and cultural building.***

***I get it, I really do—I live in the first new residential tower build in downtown in 2003, but ... at a certain point, you kill the Golden Goose—developers need to take the lead in preserving our historical and cultural places, and incorporate them into development.***



## DOWNTOWN AUSTIN SHOULD RETAIN THE PRESENCE OF CULTURAL ASSETS, ESPECIALLY LIVE MUSIC – A DEFINING AND DISTINCTIVE ASSET

### IN THEIR OWN WORDS

*Allow for live music to remain. There have been venues that have been leaving downtown for outlying areas and I believe that if too many leave it will cause the live music in the city center to weaken.*

*If we lose arts, music, and the other cultural touchstones that are the living, breathing heart of our fair city, we are no better than Dallas or Houston—and we deserve the soul-sucking wasteland we will become if that happens.*

*"Highest and best use" is not always the right answer. If the City of Austin is not careful we will lose our cultural identity, and it will become cost-prohibitive for artists and musicians and bars and music venues, and we will no longer be the live music capital of the world.*

*Live music venues need to be protected from fancy condos and hotels.  
They are the essence of this city, and they're consistently rolled over by new residents of even newer, high-end housing and hotels.*

**MUSIC !!!!! SAVE OUR MUSIC.**

*Make sure new businesses are required to take into account that are building in an active entertainment district.... and that is why they are here!*



## DOWNTOWN AUSTIN SHOULD PRESERVE AND ENHANCE ITS LOCAL BUSINESSES AND DISTINCTIVE VIBE

### IN THEIR OWN WORDS

*Austin has been a quaint patchwork of eclectic, and eccentric, people and businesses. We're forcing those people and businesses out of downtown, and it gets worse every year. Downtown Austin is losing all of its character. It's becoming just like every other, boring, homogenized city in America. We need to protect it.*

*Stop local, unique businesses from being pushed out from rising rents or from big developers taking over.*

*Downtown Austin needs to maintain its iconic structures/businesses so it maintains its character and doesn't feel just like any other central business area.*

*Vintage businesses and restaurants shouldn't be priced out of the central city.*

*It is becoming generic . . . It's just becoming more like any other synthetic town. The local flavor is dying.*

*More great independent restaurants and breweries/bars that don't just cater to travelers on business accounts.*

*Going downtown was where we went to enjoy music, art, exercise, dinner, breakfast. Now it's a conventioners paradise with chain places to handle all those people plus the cosmopolitan young people who make enough money to buy high-rise condos and live large eating in the expensive restaurants.*

*The new places in the downtown corridor are not a catalyst to inspire new, creative, unique business ideas. Everything is high end, and that will not attract diverse and eclectic new business that would ultimately lead to a more exciting downtown. To be blunt, Austin's downtown has become boring in its growth.*

*Austin is living on its past reputation. At this trajectory, in 5 years it will not be a decent place to live anymore. Just like any other bigger city.*

*Maintain a plethora of unique business districts (Warehouse/4th, 6th, Market, etc.). Keep the mix of tenants diverse.*

*Don't sell out! Stay true to your Austin heritage! The Warehouse District and Seaholm are great examples of places that have been revitalized in a way that celebrates our city's heritage.*

*If downtown doesn't become a place for everyone, a place with the elements of everyday life, for everyday people, it will continue to trend towards a more exclusive, more expensive place, where the primary experience may be contrary to the values that shaped this city for generations.*



## THE CHALLENGE OF HOMELESSNESS SHOULD BE SOLVED

### IN THEIR OWN WORDS

***Too many homeless on the streets begging for food, money, a place to sleep.***

*The homeless population is completely out of control. I am hounded by aggressive panhandlers constantly. As is often the case, they are mentally unstable—and when they are acting out, it is frightening.*

***What I love most about [the downtown ambassadors] is how empathetic they are with the homeless folks down here who have a wide variety of mental health and/or substance abuse issues. They help downtown feel safe while also being welcoming of all people and that's really nice.***

*The alleys could use a nightly spray down to help remove the human urine and feces too. Two words that are a pity to use when describing our downtown.*

***I had homeless people approach me and my [five-year-old] son on multiple occasions. My son saw a needle in the park while walking the dogs.***

*The homeless situation is intolerable.*

***It's not that I don't like homeless people. My heart goes out to them.***

*Austin has got to get rid of the ARCH, and get the homeless, mentally ill, drug addicted people out of downtown.... It's reached the point where it's so unsafe and just gross.*

***The only time I don't feel safe is when I'm being accosted by an unstable, unpredictable homeless person.***

*We have an ever-increasing homeless population that is forced into the indignity of relieving themselves outside. This is ridiculous, we live in a first world country, we can afford more bathrooms.*

***Help the homeless so they can get off the streets once and for all.***





## DOWNTOWN AUSTIN SHOULD WELCOME ALL - BE APPEALING AND ACCESSIBLE FOR FAMILIES

### IN THEIR OWN WORDS

*For families there's absolutely nothing.... You can't really have a picnic over at the lake—it's too hot, there's not enough trees, and there's no family friendly type of restaurants.*

*There is nothing for smaller children to do in downtown . . and playground equipment isn't readily available.*



## AND BETTER REFLECT THE RACE/ETHNIC PROFILE OF AREA RESIDENTS

*There's no African Americans or people of color. It's too lily white.*

# SUMMARY

To ensure that downtown Austin retains or improves its appeal to the local residents, these results suggest the following:



## ADDRESS MYRIAD MOBILITY ISSUES

Addressing these mobility issues is essential – this includes ingress and egress, circulation, and more progressive planning that takes emerging technologies and preferences of younger people into account.



## ENSURE DOWNTOWN IS WELCOMING AND AFFORDABLE

Ensuring that downtown is welcoming and affordable – to the fullest extent possible – so that it is appealing and accessible to the area's growing and increasingly diverse community.



## SUCCESSFULLY ADDRESS COMPLEXITY OF HOMELESSNESS

Successfully addressing the complex issues surrounding homelessness.



## HIGHLIGHT AUSTIN'S UNIQUE HISTORY AND LOCAL CHARACTER

Preserving and highlighting Austin's unique history and local character (e.g., arts and entertainment, live music, home-grown small businesses) is mission critical. This valuable and distinctive aspect of place can't be replicated anywhere else.



## GROW AND LEVERAGE PARKS AND PUBLIC REALM

Growing and leveraging parks (through programming, connectedness, and design) and other aspects of the public realm (streets and sidewalks) so that these community assets are lively, welcoming and attractive gathering places. Ensure that the public realm brings value to everyone in the region.



Ensuring that downtown Austin retains or improves its appeal to the local residents will, no doubt, prove to be an ambitious undertaking.

## IMPLICATIONS

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Achieving the vision will prove to be enormously complex.

Success will require not only **financial investments** but also the **committed and coordinated planning and execution of both public and private sector entities**. And effective planning will require **ongoing consideration of the experience of downtown users**.

Given the exceptionally rapid pace of change, the time for such an effort is **now**. The **potential impact is enormous**; the outcome would be nothing short of **an amazing legacy** serving Austin area residents and visitors for decades to come.



**THANK YOU**

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**DOWNTOWN AUSTIN, A COMMUNITY SURVEY**

M. Crane & Associates, Inc.