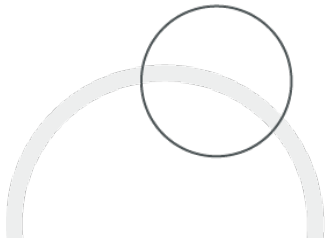


# radiantbrands

Shaping customer experience.



STRATEGY CREATIVE PRINT WEB



10/27/11

Downtown Berkeley Association

# Strategic Marketing Plan and Rebranding

Research Highlights





# Summary of Initial Research



- Interviews with 35 stakeholders in Downtown
- Key comments – what people said
- Inventory of current and planned downtown assets
- Downtown Perceptions Survey – 2,200 responses
- Graduate Student Survey highlights
- Key observations so far – the good and the bad
- Potential for the future – three words

# Interviews: Who we spoke with

- Berkeley Rep, Magnes Collection, Freight & Salvage, Berkeley Economic Development, Half Price Books, Jazz Café, Venus/Revival, The UC Berkeley StartUp Cluster, Retailers, Councilmember Jesse Arreguin, Berkeley City College, YMCA, Walgreens, Berkeley Convention and Visitors Bureau, UC Berkeley Graduate Student Assembly, BAHA, Hudson McDonald Developers, Hotel Shattuck Plaza, Mechanics Bank and many more...



# Stakeholder Interviews: What people said

The Potential of Berkeley's  
Downtown



# Berkeley is more than local...



- “We draw people from as far away as San Jose and Santa Rosa and occasionally people fly in. **We are a destination.**”
- “With over 200,000 people attending annually... we connect people to the local restaurants, eating and drinking establishments”.



# It's a disconnected place...



- “The downtown is really not one place, it's a series of destination places that are not connected.”
- “You don't want to walk, window shop or stroll in downtown —there's not enough there.”
- “It feels and looks dirty, and panhandling and street behavior are an issue in certain places.”

# Hidden treasures, but...

- “Easily accessible, steps away from amazing spaces and great, great location. The flip side is the area around the BART station is not welcoming, and dirty.”
- “We see the downtown as a real hidden treasure with great potential, and the arts district is very exciting.”



# Perceived barriers ...

- “Why can’t eating and drinking places get permits by right with no extensive public review? Why don’t we invite entrepreneurs to a district that welcomes these attractions?”
- “Parking’s not an inventory problem, people just don’t know where it is. If it was signed better, clearly shown and coordinated it would invite people downtown.”

## What first-time visitors see...




- “European travelers are surprised at how dirty it is for a University town.”
- “Parents who’ve arrived with their U.C. students come to ask if there’s a place in downtown to get bedding.”
- “The comment we get from first-time visitors is where else can I go besides downtown to shop?”



# Survey Monkey Highlights: Perceptions and opinions

2,200 responses in one week of  
availability

# Mostly women responding

What is your gender?		Response Percent	Response Count
Female		62.7%	1,318
Male		36.9%	777
Other		0.4%	8

# 50% from 35-59 years of age

How old are you?		Response Percent	Response Count
Under 18		0.1%	3
18-24	█	2.0%	42
25-34	█	8.8%	183
35-49	█	28.6%	598
50-59	█	23.1%	483
60-69	█	25.7%	536
70+	█	11.7%	244

# Incomes above \$100,000

**What is your approximate annual household income?**

		Response Percent	Response Count
Under \$25,000		3.2%	60
\$26,000 - \$40,000		6.8%	127
\$41,000 - \$60,000		10.4%	194
\$61,000 - \$85,000		14.6%	271
\$85,000 - \$100,000		16.2%	302
\$101,000 +		48.8%	908

# Mostly Berkeley residents

What is your connection to Downtown Berkeley? (Mark all that apply)			
		Response Percent	Response Count
Property owner	<input type="checkbox"/>	11.8%	244
Business owner	<input type="checkbox"/>	5.2%	107
Employee	<input type="checkbox"/>	10.7%	221
Student	<input type="checkbox"/>	3.6%	75
Faculty or staff of educational institution	<input type="checkbox"/>	9.9%	204
Berkeley resident	<input checked="" type="checkbox"/>	79.7%	1,646
East Bay resident (other than Berkeley)	<input type="checkbox"/>	13.4%	276
Other (please specify)			219

# Restaurants, theater, movies, bookstores

How often do you do the following activities in Downtown Berkeley?							
	5+ days/week	Several times/week	Weekly	Monthly	Several times/year	Rarely	Response Count
Full-service restaurants	0.4% (9)	3.2% (67)	14.0% (296)	25.8% (543)	31.5% (663)	25.1% (529)	2,107
Quick service food	0.7% (13)	6.9% (137)	13.3% (263)	15.1% (300)	16.9% (335)	<b>47.2% (935)</b>	1,983
Shopping	0.3% (7)	2.8% (57)	11.6% (236)	18.8% (383)	24.2% (492)	<b>42.2% (859)</b>	2,034
Cultural Events: live music, theater	0.1% (2)	0.9% (19)	5.8% (120)	25.3% (525)	<b>38.7% (805)</b>	29.2% (608)	2,079
Nightlife: bars, clubs	0.0% (0)	0.5% (10)	3.1% (61)	9.1% (178)	19.4% (377)	<b>67.8% (1,321)</b>	1,947
Movies	0.0% (1)	0.4% (8)	5.0% (106)	20.9% (439)	41.4% (870)	32.2% (676)	2,100
Bookstores	0.0% (1)	1.6% (32)	5.8% (117)	19.7% (399)	32.1% (649)	<b>40.8% (826)</b>	2,024
Personal Services: banks, salons	0.2% (5)	3.5% (70)	12.7% (256)	19.8% (398)	19.7% (397)	<b>44.1% (887)</b>	2,013
Fitness: YMCA, yoga	2.5% (50)	11.7% (230)	7.6% (149)	3.6% (71)	5.7% (113)	<b>68.8% (1,353)</b>	1,966
Farmers' Market	0.1% (3)	0.4% (8)	14.1% (285)	12.9% (260)	23.0% (465)	<b>49.5% (1,001)</b>	2,022
Special Events	0.1% (1)	0.2% (4)	0.9% (18)	7.6% (147)	32.8% (638)	<b>58.4% (1,135)</b>	1,943
Employment	11.2% (207)	3.8% (70)	1.7% (32)	2.0% (37)	2.2% (41)	<b>79.1% (1,463)</b>	1,850



# Shopping, parking, panhandling, grime






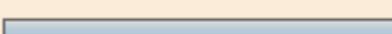
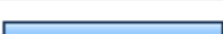




Do any of the following issues discourage you from visiting Downtown Berkeley?				
	Major factor	Somewhat	Not a problem for me	Response Count
Not enough places to sit and relax	22.0% (439)	36.1% (719)	42.3% (842)	1,992
Limited shopping options	47.7% (984)	35.0% (722)	17.5% (361)	2,061
Not enough street parking	46.7% (962)	29.0% (596)	24.6% (506)	2,058
Street parking too expensive	30.3% (611)	26.8% (540)	43.4% (874)	2,016
Garage parking too expensive	35.7% (720)	27.8% (561)	36.8% (743)	2,018
Concerns about personal safety	18.6% (377)	33.4% (678)	48.2% (980)	2,032
Aggressive panhandling	40.3% (836)	34.4% (713)	25.8% (535)	2,072
People sitting or lying on the sidewalk	42.9% (888)	33.1% (685)	24.2% (500)	2,068
Other inappropriate street behavior	40.8% (833)	33.5% (684)	25.9% (528)	2,040
Not clean enough	39.6% (806)	37.0% (753)	23.7% (482)	2,036

Comments:

748

# More food festivals, music events

Which of the following types of events would bring you to Downtown Berkeley? (Mark all that apply)

		Response Percent	Response Count
Craft fairs		51.9%	1,001
Fine arts fairs		48.5%	936
Food festivals		71.3%	1,376
Technology events		29.2%	563
Farmers' Market (more frequent)		42.0%	811
Outdoor live music		58.8%	1,134
Retail discount day		32.7%	632
Lecture series		46.2%	891
Outdoor movie nights		46.4%	896
Literary events		47.8%	922
Other?		5.3%	102

# Shopping: what's missing?

- "Berkeley is the town where you can't buy a pair of socks. It would be nice to have a selection of retailers who sell general merchandise. What would give it the extra zing would be specialty retailers."
- "A mix of large retail (hey, our city needs the revenue) with locally-owned, small businesses..." I go to a Macy's out of town. In fact, I save up several clothing items and household items to buy in other cities.

## More full service grocery...

- “Grocery stores are definitely something that I would like to see in Downtown Berkeley. There are only a few stores in the area where I can get produce and meats. Though there is a Farmers' Market weekly, sometimes there are things I need immediately, or there are things that I need to buy that can't be bought in the Farmers' Market.”

# The walkable environment...

- “ We can walk to downtown and do for library/YMCA/ movies but with children **the environment is just too grungy** and our daughter is intimidated by the people asking for money. ”

# We need gathering spaces...

- “I am not bothered by the lack of retail. Can't we think outside of the box (big box) and make our downtown a place to gather, like the Italian concept of strolling in the evenings and community gathering? This will not happen until we seriously invest in community and it may mean restricting the gathering of undesirables near the BART station.”

# Graduate Student Survey

- 1,850 respondents, 95% students
- 87% would like a Target-type store for essentials
- 80% want an upscale store like J. Crew
- 80% wanted a basic clothing store like Old Navy
- 79% wanted a shoe store or a sporting goods store
- 70% said they would like one-of-a-kind local retail
- 79% would like more eating/drinking, entertainment venues



# Creating a New Image: What's the focus for the future?

Building awareness and a positive  
image for Berkeley's downtown



## I. EXECUTIVE SUMMARY

This report summarizes a study of opportunities to improve the v  
downtown. The goal of the study is to determine what combination of factors  
improving retail vitality in the downtown and to provide this information in a readily available  
business owners, property owners, developers, brokers, and others that may be involved in strengthening  
the performance of retail in the downtown.

### KEY FINDINGS

- The current boundaries of Downtown Berkeley Business Improvement District are too large to define as one area. Downtown Berkeley's boundaries include multiple areas with distinct retail characteristics. By identifying sub-areas within the downtown, retail strategies can be better crafted to deal with the unique retail challenges of each smaller area. Similar to Berkeley's existing Arts district, other small specialty retail nodes will strengthen downtown Berkeley's retail identity.
- Shattuck Avenue is not the only pedestrian spine for retail activity. While Shattuck Avenue is a major auto corridor through downtown Berkeley, the width of the street, the level of traffic and noise and the streets current configuration do not lend themselves to an ideal pedestrian environment on every block. Narrow side streets perpendicular to Shattuck Avenue provide a much better environment for the type of retail Downtown Berkeley is interested in attracting.
- Addison, Center, Allston and Kittredge Streets will play a key role for further retail activity. These major side streets perpendicular to Shattuck Avenue connect downtown Berkeley to the University, are centrally located within the downtown and are attractive for pedestrian scaled retail development. They are considered the catalytic streets in downtown Berkeley and are a part of the first and most important downtown sub-area.
- Downtown Berkeley is an emerging arts and culture hub, not a traditional commercial district. Due to its distance from a major freeway and existing competitive supply, Downtown Berkeley will probably not emerge as a regional retail district. Downtown Berkeley is however a regional destination because of its focus on arts and culture as well as the presence of the University of California Berkeley.
- There is a lack of proper signage to parking spaces in Downtown Berkeley and it is unclear whether or not the supply is enough to meet demand. While limited signage exists to direct patrons to public parking garages, no comprehensive signage has been developed to direct people to alternate garages such as the UC garages, which are open to the public on weekends. The general public is uninformed about the extent and availability of parking in Downtown Berkeley.
- Very little buying power exists in Downtown. Most of the residential units in Downtown Berkeley are located at the periphery. There is not enough buying power from those residential uses to support neighborhood serving uses in the Downtown.
- Office uses create a significant amount of sales tax revenue through business to business sales.

# No Surprises...

- Downtown Berkeley Retail Marketing Study 2007



# Five key issues...



- **WHAT' S HAPPENING?** – providing accessible information on events and amenities
- **RETAIL** – Limited and disorganized, doesn' t really encourage you to window shop, or be in downtown.
- **GRIME** – dirty and uninviting appearance that is not conducive to hanging out.
- **STREET BEHAVIOR** –, aggressive panhandling, sitting and lying on streets and store fronts.
- **PARKING** – it' s more about finding it and knowing where the inventory is.

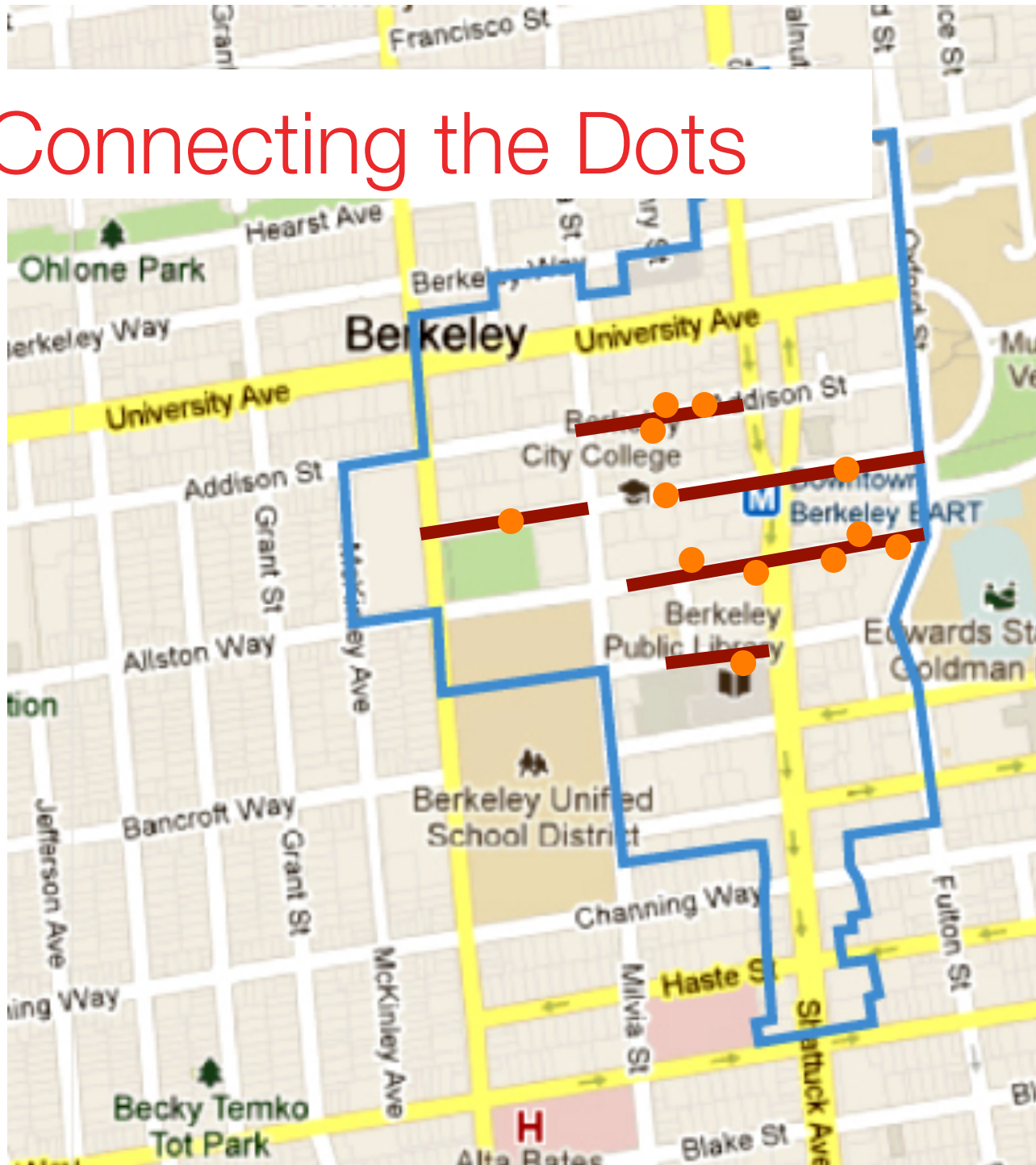


# Summary of Assets



- The Arts District
- Growing Museum Venues
- New and Emerging Restaurant Scene
- YMCA, Berkeley City College, Berkeley Library
- The Brower Center
- The Hotel Shattuck Plaza
- BART
- The StartUp Cluster and SkyDeck
- The University of California

# Connecting the Dots



# The Potential...

- Exciting and growing cultural and entertainment venues
- Changing of the physical spaces, traffic reduction
- Streamlining – easier to get business permits
- Growing higher-end dining opportunities
- More residents in Downtown
- Emerging Start-ups in Downtown
- BART accessibility very big, with plaza improvements
- Future coordination of parking information and access
- Retail – a great potential if marketing right

# Three Words on Downtown's Future

Vibrant, inviting, surprising

Vibrant, fun, historic

World class, intriguing, edgy

Vibrant, innovative, exciting

Historic, gentrified, managed

Emerging, exciting, clean

Vibrant, eclectic, community

Unique, welcoming, engaging

Worldly, busy, vibrant

Hip, fun, exciting

Safe, parking, retail

Vibrant, sustainable, living room

Diverse, accessible, friendly

# Positioning for Downtown Berkeley

- Stimulating, intellectual, artistic
- Culinary, eating, drinking, inviting, exploring
- Emerging, small retail connections
- Unique one of a kind location
- Emerging start-up business potential
- World-class university is next door
- Youthful, experienced and cross cultural
- Accessible, potentially inviting
- Worldly, busy, vibrant, eclectic



# Rollout of Downtown Berkeley



**Core Brand Positioning:** Key messaging, visual presentation of the brand for the DBA and downtown

**Strategy & Focus for Downtown:** Recommended marketing elements, events, and focus for the downtown

**Recommended Rollout Events:** Public events to roll out the new brand and the DBA

**Online Web & Social Media Ideas:** Presentation of the new website focus and use of social media



Shaping customer experience.

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