

West 38th Avenue Economic Development Strategy
Report of Findings & Recommendations
Prepared by Progressive Urban Management Associates (9/9/11)

I. Project Background & Approach

In the spring of 2011, P.U.M.A. was engaged by NEWSED and the West 38th Avenue Merchants Association (through funding made available by the City of Denver's Office of Economic Development) to develop an economic development strategy for the West 38th Avenue business district. The boundary of the study area encompasses West 38th Avenue with Sheridan Boulevard as the western boundary and Fox Street to the east. The corridor encompasses the surrounding neighborhoods of Berkeley, Sunnyside, West Highland and Highland.

The economic development planning process was designed to meet the following objectives:

- Identify market opportunities to support new business activity along the corridor
- Determine a market niche strategy for the corridor that builds upon its distinct differential advantages
- Provide recommendations to strengthen and sustain West 38th Avenue Merchants Association
- Develop an economic development strategy through a participatory process

To meet the preceding objectives, P.U.M.A. completed a scope of work that included:

Key Market Indicators – P.U.M.A. developed a profile of key market indicators for the corridor that includes neighborhood demographics, socio-economic indicators, retail sales tax collections, traffic counts and crime statistics in the study area.

Community Survey – A community survey was distributed to area residents and businesses through the West 38th Avenue Merchants Association, and through the generous support of several neighborhood organizations in the study area. The survey focused on questions regarding the types of goods, services and improvements the area residents would like to see along the corridor. 214 surveys were completed.

Corridor Visioning Workshop and Small Group Meetings – The P.U.M.A. team held a series of small group meetings with property and business owners along the corridor to get a sense of the strengths and weaknesses of the corridor and what improvements are needed. The consulting team also met with the West 38th Avenue Merchant's Association board and NEWSED staff several times throughout the process.

II. Prevailing Themes

Based upon the market research, small group meetings and community survey results, several themes emerged that reveal a changing community and define shared goals for improvements to the physical realm and business mix available along the corridor. The major themes for the corridor and adjacent neighborhoods are outlined below:

➤ Changing Demographics:

The demographics of the four surrounding neighborhoods -Berkeley, Sunnyside, West Highland and Highland - changed significantly between 2000 and 2010. Overall, the neighborhoods became older, better educated, wealthier and more Anglo:

- Overall population has decreased 11.5% since 2000 while the number of households has increased by 6% in the same period as households became smaller in size.
- Residents under the age of 18 declined by 28% since 2000.
- Educational attainment has increased by nearly 50%.
- The four neighborhoods experienced income growth ranging from 8% growth in Sunnyside to 48% in West Highland. (Citywide income increased by 17%).
- Anglo populations increased for 5% to nearly 60% in each neighborhood (most notably in the Highland neighborhood) while Hispanic/Latino populations decreased by 31% to 55% in each of the neighborhoods. Citywide, both Denver's Anglo and Hispanic populations grew by about 9%.

➤ ***Community Survey:***

A community survey was distributed electronically via area neighborhood associations and the West 38th Avenue Merchants Association website. The survey was geared toward residents and asks how they use the corridor, their impressions of the corridor and what physical improvements and new businesses they would like to see on the corridor in the future. There were 214 responses. Highlights of the attached survey summary include:

- More than 80% of respondents reside in the adjacent neighborhoods and 15% identified themselves as business owners.
- Survey respondents were relatively young, with nearly half being age 35 to 49, and more than 30% being age 25 to 34.
- A majority reported annual household incomes of \$100,000 or more.
- More than 70% of respondents think the corridor has improved in the last five years. Reasons for the perceived improvement include a cleaner, safer environment, better retail mix and new restaurants and entertainment.
- Almost 75% of respondents indicated that a more appealing pedestrian realm is the most important factor in improving the corridor over the next 5 years. Other top priorities included better safety, more restaurants and entertainment, more diverse retail mix and filling vacant storefronts.
- When asked to choose the most compelling improvement, top choices are to improve the pedestrian environment (41%), followed by more restaurants and entertainment (11%) and a more diverse retail and business mix (10%).

➤ ***Neighborhood Focus:***

The outreach indicated that although West 38th Avenue currently functions primarily as an east-west vehicular arterial, residents are eager to recapture the corridor's role as a neighborhood-serving commercial district. Participants in the outreach indicated the avenue used to be the premier corridor in northwest Denver offering goods and services to the surrounding neighborhoods.

➤ ***Better Pedestrian Environment:***

The community survey and small group outreach indicated the overwhelming priority of residents is to improve the pedestrian environment along the corridor through enhanced pedestrian lighting, wider sidewalks, landscaping and installing more signalized crosswalks and traffic calming strategies. Survey respondents and small group participants indicated they want to be able to walk to businesses and services along the corridor, but the current environment is not consistently pedestrian friendly.

West 38th Avenue remains a significant traffic corridor, with recent daily traffic counts averaging nearly 20,500 vehicles per day and ranging from nearly 17,000 cars at Sheridan to 23,000 cars at Tennyson. These traffic counts offer visibility to businesses, but are not considered sufficient to attract most chain and franchise stores. Plus, the traffic counts may reveal the corridor's strong use by commuters to and from downtown.

➤ **Local Businesses and Restaurants:**

While the outreach process revealed that more restaurants and local retail has contributed to a better and more desirable corridor over the past five years, there continues to be a strong desire for more locally owned neighborhood serving retail, restaurants and services.

Interestingly, retail sales along the corridor have registered sharp gains over the past three years. Annual sales tax receipts grew by 11% from 2008 through 2010, despite the severe economic recession. Drivers for sales tax along the corridor are led by restaurants (about half of all sales tax receipts) and food and beverage stores.

➤ **Leverage Organizational Capacity Along the Corridor:**

There are several distinct entities along the corridor: The West 38th Avenue Merchant's Association and two Local Maintenance Districts (LMDs), as well as other adjacent groups like the Tennyson Business Alliance, The Federal Partnership, Berkeley Merchant's Association and others. Stakeholders indicated there could be greater efficiencies among the different organizations, better coordination and communication to businesses and residents about what each does as well as pooling resources and expertise.

III. Niche Strategy

Based upon the stakeholder outreach and neighborhood profiles, the recommended niche strategy for the 38th Avenue Corridor is:

38th Avenue links northwest Denver's neighborhoods and enhances community cohesion through neighborhood serving retail, restaurants and services. While the corridor has been traditionally oriented to vehicles, its future can be a vital edge to thriving communities, a "living street" that serves both pedestrians and cars.

IV. Recommendations

Based upon the outreach and market conditions summary, several recommendations for the West 38th Avenue Corridor are suggested and fall into three distinct categories: **physical realm**, **business assistance and events** and are outlined below:

➤ **Physical Realm**

Because the physical realm, particularly enhancements that will contribute a better, safer and more appealing pedestrian environment was consistently mentioned as the number one priority among stakeholders, several initiatives are suggested including:

Living Streets Inventory: Work with the City's Departments of Public Works and Community Planning and Developments as well as neighborhood and business groups along the corridor to initiate a corridor study to determine ways to make the street more amenable to walkers (and potentially bikers), reduce traffic lanes and/or traffic lane widths to calm traffic, and make the street more pedestrian-friendly without impeding the vehicular use along the corridor. Elements of a living streets inventory could include:

- Pedestrian crossings – determine if there is there a need to add more crossings at critical intersections and specific nodes of the corridor.
- Traffic calming - determine if traffic calming measures can be employed in areas that are high pedestrian activity zones.
- Wider sidewalks – determine if there is adequate right-of-way to increase sidewalk widths in places along the corridor.
- Additional pedestrian lighting – assess the pedestrian-scale lighting to determine whether it is adequate and where additional lights could be placed.
- Bike lanes – Investigate whether there are sections of the corridor that might have adequate right-of-way to include bike lanes and whether there is potential to connect with existing bike routes and lanes.
- More trees – determine if street trees along specific intersections could enhance the overall appeal of certain parts of the corridor and consider ways they would be maintained if added.
- Safe Routes to School – identify school routes for neighborhood kids and mark them with flags, signage, and enhanced wayfinding strategies.

In the long term, signage, gateways and wayfinding could be installed along the corridor in key locations.

In order to manage the expense and maintenance associated with any new improvements, specific nodes along the corridor should be identified as priority locations for any enhancements identified as part of the complete streets inventory. Over time, those enhancements could be broadened to cover the entire corridor as resources are made available.

➤ **Business Assistance**

The outreach process revealed that in addition to an enhanced pedestrian environment, area residents would like to see a more diverse business mix that is responsive to nearby residents' needs for goods and services. More restaurants and locally owned businesses were specifically identified. In order to usher in a more diverse and neighborhood-serving business niche, several strategies are recommended:

Business Inventory & Corridor Directory: In order to identify the types of businesses that are needed along the corridor, a complete inventory of existing businesses needs to be established and regularly updated. NEWSSED has begun this effort and finalizing it will be a critical component in fully understanding the existing conditions along the corridor.

The inventory can be maintained in a spreadsheet format and should be updated annually. The inventory can be used as a tool to attract new businesses, match new businesses with available space and can used as a marketing tool for new businesses interested in locating along the corridor.

The inventory should itemize:

- Business type
- Owner and contact information

- Approximate square footage
- Available space with a description of approximate square footage and potential use (retail, restaurant, office, etc.,)

Information obtained through the business inventory could be used to create a map and directory of corridor businesses, services and restaurants and could be used to market vacant storefronts to prospective businesses. The inventory could be accessed through the West 38th Avenue Merchants Association web site as a membership benefit.

Technical Assistance: As new businesses locate along the corridor, it will be critical to be able to provide a variety of resources and support services to help them be successful. Locally owned businesses have been identified as the preferred business type along the corridor and will need to be able to find resources, make appropriate connections at the City and understand the local marketplace. The West 38th Avenue Merchants Association can position itself to be the first point of contact for new businesses to provide needed support and information including:

- Business Planning
- Merchandising
- Marketing & Promotions
- Web design
- Others as identified

Initially, the West 38th Avenue Merchants Association, in cooperation with NEWSSED, could simply be the point of contact to direct prospective businesses to the right resources. In the longer term, the Association could provide that expertise via staff, volunteers or other resources.

➤ **Events**

Events can help bolster an overall sense of identity and community for the corridor. While the corridor itself encompasses four statistical neighborhoods, it is the common element to all of those adjacent neighborhoods, residents and businesses. Events can also be used to celebrate the culturally diverse and eclectic mix of business and restaurants represented along the corridor. Building upon the success of the recent success of Festival 38, more corridor-wide events are recommended to enhance the identity of the corridor and its relationship to the adjacent neighborhoods. Additionally, the West 38th Avenue Merchants Association could organize a master calendar for all events produced in the neighborhoods along the corridor to ensure events are spread out throughout the year and avoid duplicative events.

V. Organizational Recommendations

In order to implement the preceding recommendations, leverage resources and avoid duplicative efforts, several organizational recommendations are being suggested including:

Local Maintenance District (LMD) Collaboration: Consider combining the two adjacent Local Maintenance Districts (LMDs) along West 38th Avenue. Each has a separate board of directors, budget and work plan. Combining the two LMDs into one would create greater consistency and provide a unified vision for West 38th Avenue. Currently the two LMDs are:

- West 38th Ave. Phase I is located along both sides of West 38th Avenue between Jason and Mariposa Streets. In 2011 the budget was \$25,232. General information regarding the LMD can be found at: <http://www.denvergov.org/Portals/705/documents/13%20West%2038th%20Ave%20Phase%20I%20LMD%20District%20Information%20061011.pdf>
- West 38th Ave. Phase II, which is located along both sides of West 38th Avenue between Federal Boulevard and Mariposa Street. In 2011 the budget was \$12,000. General information regarding the LMD can be found at: <http://www.denvergov.org/Portals/705/documents/17%20West%2038th%20Avenue%20Phase%20II%20LMD%20District%20Information%20061011.pdf>

By definition, LMDs are created for the maintenance and continuing care of streetscape features that exist in the public right of way. LMDs could be a useful tool in constructing and maintaining pedestrian amenities desired by local residents. Joining the LMDs would require working with property owners within the current LMDs and the City's Public Works Department.

If property owners and the current LMD board members are amenable, bringing the management of the LMDs within the West 38th Avenue Merchant's Association would potentially allow for greater collaboration along the corridor. If the LMDs and the Merchant's Association work together, there is greater opportunity to leverage resources and create a more unified vision for the corridor. In the mid-term (next 2 to 3 years) there may be a willingness to extend the LMD to the western part of the corridor or even consider another special district mechanism that would unify the corridor and have the ability to raise more revenue and potentially implement more improvements and programs to bolster the corridor's overall appeal to consumers and investors.

Northwest Denver Business Districts Collaboration: The West 38th Avenue Business Association has an opportunity to join forces with several other organizations currently working in northwest Denver. A collaborative organization or approach among the various organizations could create a new alliance with a strong northwest Denver voice. Organizations including Tennyson Street Alliance and the Federal Partnership could come together with the West 38th Avenue Merchant's Association as potential partners and collaborators in a northwest business district partnership. The partnership could represent the voice of many Denver business districts and could work together to achieve common programs, events, improvements and investment.

Additional recommendations for the West 38th Avenue Merchants Association include:

- Continue the formal partnership with NEWSED CDC for overall organizational guidance and mentorship as well as specific technical assistance support;
- Become an active member in the city-wide effort led by the Office of Economic Development - the Business District Alliance (or "BDA") that provides resource for small business districts and individual businesses around the City of Denver. The BDA was formed to assist business districts through networking and idea sharing.

Executive Director: In order to create an organization with capacity to engage residents, implement programs, provide resources and support businesses, a staff person is recommended. It is suggested the West 38th Avenue Merchants Association work with the City's Office of Economic Development (OED) to hire an Executive Director to manage a northwest Denver business support office that could serve the West 38th Avenue, Tennyson and perhaps the Federal Boulevard corridor. Morrison Road and the Welton Corridor both have business support offices with Executive Directors funded by OED. The Executive Director should possess the following skills and qualities:

- Exceptional communication skills

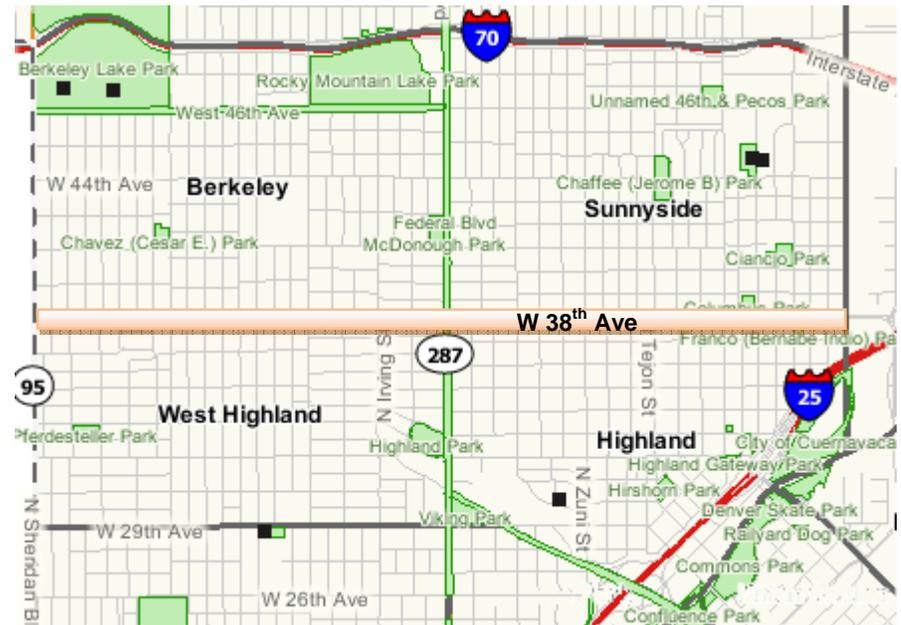
- Ability to build consensus among businesses, property owners and residents along the corridor
- Committed and passionate to neighborhood business development
- Facilitate technical assistance and small business resources
- Able to collaborate effectively with Spanish-speakers along the corridor
- Ability to be proactive and resourceful in administering the recommendations contained in this plan
- Cultivating and promoting a vision for West 38th Avenue
- Maintaining and updating the web site
- Coordinating and documenting information about property and business ownership in the district
- Administrative tasks such as answering phone calls, responding to emails and inquiries Coordinating meetings
- General support to the board as needed
- Ability to coordinate business support, work with partners to deliver technical assistance support
- Work with City planning, public works and other city agencies to pursue complete streets efforts
- Ability to coordinate special events to promote the corridor
- Communicate and collaborate with other neighborhood and business organizations
- Potentially assume LMD responsibilities by working closely with existing LMD boards to gauge their interest in pursuing a collaborative relationship

West 38th Avenue Corridor – Adjacent Neighborhoods *(draft 8.19.2011)*

The following analysis is based upon recent Census data compiled for the four Denver statistical neighborhoods that are immediately adjacent to the West 38th Avenue Corridor. The neighborhoods include Berkeley, Highland, Sunnyside and West Highland, wherein reside a market that lives within a ten-to fifteen minute walking distance of the West 38th Avenue Corridor. Between 2000 and 2010, the City of Denver's population grew by 8.2%, compared to 16% growth for the entire metropolitan area.

Demographics

In 2010, 34,807 persons resided within the four neighborhoods, representing a decline of 11.5% since 2000. The Highland and Sunnyside neighborhoods combined represented much of the loss of population, decreasing by a total of 3,753 residents. Within the neighborhoods, the number of households grew by 6.0% as households grew smaller in size. Residents of the Berkeley and West Highland neighborhoods tend to be older than Sunnyside and Highland neighborhood residents. Youth (under age 18) declined in all four adjacent neighborhoods by 28.0% between 2000 and 2010. This may be a result of declining Hispanic/Latino populations in those neighborhoods.*



2010 Demographic Summary: Neighborhoods Adjacent to the West 38th Avenue Corridor

	Adjacent Neighborhoods						City of Denver	
	Berkeley	Highland	Sunnyside	West Highland	Neighborhoods Total	% Change 2000 - 2010	City of Denver	% Change 2000 - 2010
Population	8,112	8,429	9,726	8,540	34,807	-11.5%	600,158	+8.2%
Households	4,049	4,131	3,781	4,256	16,217	+6.0%	263,107	+9.9%
Average Household Size	2.00	2.04	2.57	2.01	2.15	-16.6%	2.28	+0.4%
Median Age	37.7	33.0	33.1	36.9	-	-	33.7	+1.8%
Percent of Population Under 18	16.1%	15.4%	24.3%	15.3%	18.0%	-28.0%	21.5%	+5.7%

*sources: Census 2000, 2010 Census; 2005-2009 ACS

The Piton Foundation notes a direct correlation between Denver neighborhoods with a significant percentage of youth and those with a high percentage of Hispanic/Latino residents.

Socio-Economic Indicators

In all neighborhoods, educational attainment for persons 25 years or older increased by nearly 50% between 2000 and 2010. Persons living below poverty level increased by 6.8%, compared to an increase of more than 33% citywide. The number of owner-occupied households decreased by 2.6% within the four neighborhoods. The Berkeley and West Highland neighborhoods have higher levels of homeowner-occupancy than Highland and Sunnyside.

2010 Social and Economic Indicators: Neighborhoods Adjacent to the West 38th Avenue Corridor

	Adjacent Neighborhoods						City of Denver	
	Berkeley	Highland	Sunnyside	West Highland	Neighborhoods Total	% Change 2000 - 2010	City of Denver	% Change 2000 - 2010
% Persons 25+ w/College Degree	46.4%	45.3%	26.3%	57.0%	43.6%	+49.3%	40.3%	+30.1%
% Persons Below Poverty Level	9.3%	17.0%	21.5%	8.9%	14.6%	+6.8%	19.1%	+33.6%
% Owner-Occupied Households	63.9%	44.7%	57.3%	62.6%	57.1%	-2.6%	50.0%	-4.8%

sources: Census 2000, 2010 Census; 2005-2009 ACS

2010 median household incomes in Berkeley and West Highland were greater than those of Sunnyside and Highland to the east, and the City of Denver. Three of four neighborhoods experienced considerable income growth between 2000 and 2010 in comparison to the City of Denver.

2000 – 2010 Percent Change in Median Household Income: Neighborhoods Adjacent to the West 38th Avenue Corridor

Berkeley		Highland		Sunnyside		West Highland		City of Denver	
2010 Median HH Income	% Change 2000 - 2010	2010 Median HH Income	% Change 2000 - 2010	2010 Median HH Income	% Change 2000 - 2010	2010 Median HH Income	% Change 2000 - 2010	2010 Median HH Income	% Change 2000 - 2010
\$52,462	+27.9%	\$44,148	+38.5%	\$35,477	+8.1%	\$61,576	+48.2%	\$46,410	+17.5%

sources: Census 2000 and 2010 Census

Race and Ethnicity

Within the four-neighborhood area, Whites and Hispanic/Latinos represented the largest racial and ethnic groups in 2010. Between 2000 and 2010 the white population increased, most notably in the Highland neighborhood, as Hispanic/Latino populations decreased by 31% or more in each of the neighborhoods.

2000 – 2010 Percent Change in Race and Ethnicity: Neighborhoods Adjacent to the West 38th Avenue Corridor

Race/Ethnicity	Berkeley		Highland		Sunnyside		West Highland		City of Denver	
	Population	% Change 2000 - 2010	Population	% Change 2000 - 2010	Population	% Change 2000 - 2010	Population	% Change 2000 - 2010	Population	% Change 2000 - 2010
White	5,585	+5.5%	4,840	+59.2%	3,321	+24.5%	6,472	+17.6%	313,012	+8.7%
African-American	61	-32.2%	161	+10.3%	286	+34.9%	94	+1.1%	58,388	-2.6%
Asian	81	+39.6%	115	+105.4%	94	+40.3%	145	+21.8%	19,925	+31.6%
Other*	171	-27.8%	173	-34.4%	257	+2.4%	192	+6.7%	17,868	+12.5%
Hispanic/Latino	2,214	-31.1%	3,140	-54.6%	5,768	-31.0%	1,637	-37.9%	190,965	+8.7%

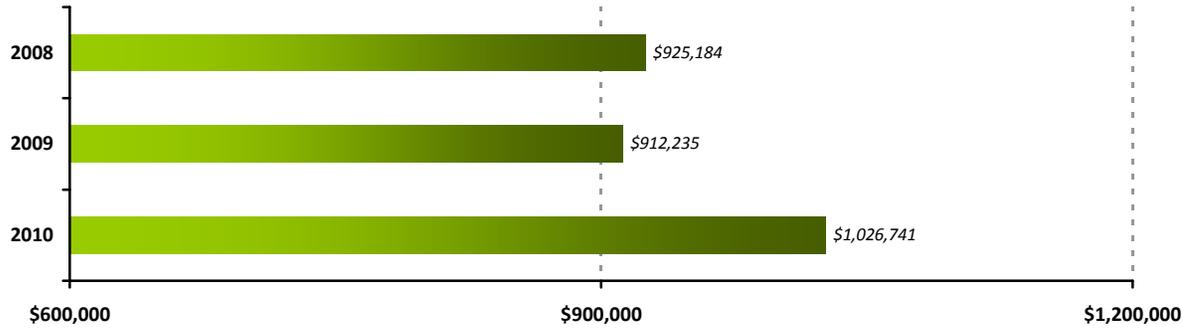
**Other* category includes Native American and persons identifying two or more races

sources: Census 2000, 2010 Census

Retail Sales Tax Collections

Retail sales tax collections for the West 38th Avenue corridor between Sheridan Boulevard and Inca Street showed a year-over year growth of 12.9% from 2009 to 2010, mostly due to a combination of increased sales and the opening of new retail businesses. More detailed retail sales tax collections by category are illustrated in the second graphic.

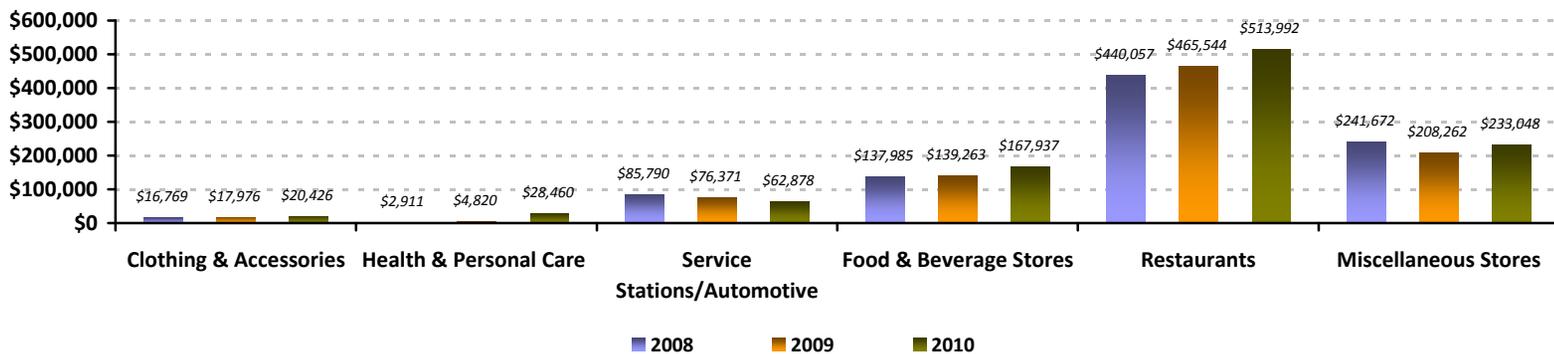
2008 – 2010 Retail Sales Tax Collections: West 38th Avenue Corridor



source: City of Denver

All sales tax categories were collected at a 3.62% rate, with the exception of restaurants, which were collected at 4%. In the instance of health and personal care stores, miscellaneous stores, and restaurants, increased sales were mostly due to the opening of a new business in each of the categories. Clothing and accessories have reported increased sales since 2008, showing an increase of 13.6% in sales tax collections between 2009 and 2010. Food and beverage store collections increased by 20.6% between 2009 and 2010, a result of increased sales and the opening of a new business. Service stations/automotive sales tax collections decreased by 17.7%, mostly due to a large business reporting lower sales.

2008 – 2010 Retail Sales Tax Collections by Category: West 38th Avenue Corridor



source: City of Denver

Traffic

West 38th Avenue is classified as an east-west arterial street that connects to Interstate 25 on the east and ends at Interstate 70 far to the west of the study area. The corridor's emphasis is on movement of people and goods, designed to accommodate vehicle trips in the form of passenger cars, trucks, and buses. Traffic counts were conducted by the City of Denver on weekdays during 1999, 2002 and 2008. Traffic volumes are the total vehicles in both directions, measured in a 24-hour period. The 38th Avenue corridor averages annual daily traffic counts of 20,437 vehicles.

1999 – 2008 Daily Traffic Volumes: West 38th Avenue Corridor



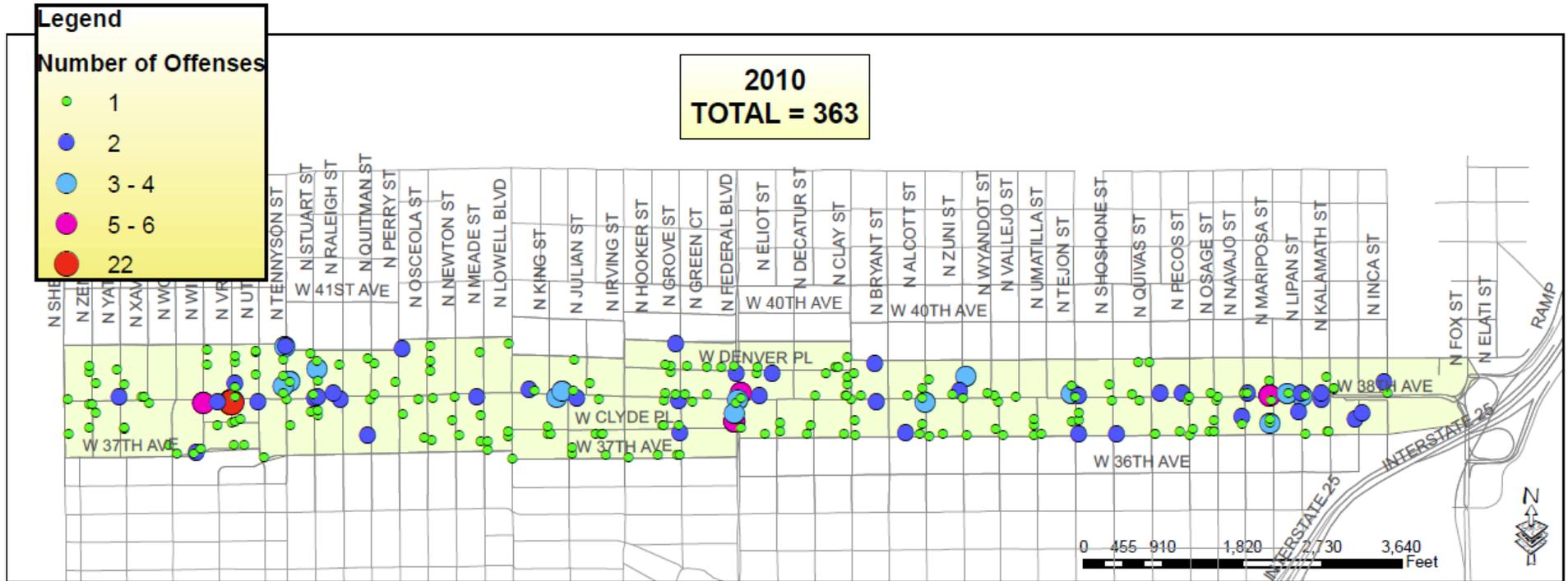
24-Hour Volumes	
①	@ Sheridan Blvd. - 16,822
②	@ Tennyson St. - 22,994
③	@ Perry St. - 22,536
④	@ Umatilla St. - 19,398

source: City of Denver

Safety

During 2010, 363 offenses were reported along the West 38th Avenue corridor, representing an increase of 9% over 2009. Within the City and County of Denver, crime decreased by 5% between 2009 and 2010. The corridor is bounded by Sheridan Boulevard, West 39th Avenue, Fox Street and West 37th Avenue. Crimes against property (burglary, theft, arson) accounted for 78% of crimes in the corridor. Theft from motor vehicles (21.8%), criminal mischief/damaged property (16.8%), burglary (11.8%) and theft (11.6%) accounted for the bulk of crimes against property in the area. Crimes against persons (aggravated and simple assaults) accounted for 8.3% of reported offenses in 2010, decreasing from 9.9% of offenses in 2009. Incidents of theft from motor vehicles increased by 60.7% along the corridor from 2009. Geographically, crime increased by 70% around Utica Street and 38th Avenue from 2009 to 2010 and decreased almost 20% east of Navajo Street on 38th Avenue during the same period.

2010 Reported Offenses on the West 38th Avenue Corridor



source: Denver Police Department

WEST 38TH AVENUE SURVEY *(draft 9.13.2011)*

As part of the West 38th Avenue Economic Development Strategy process, an online, bilingual community attitudes survey was conducted via electronic distribution through registered neighborhood organizations and the West 38th Avenue Merchant's Association website www.w38AveDenver.com. 214 respondents who live in the West 38th Avenue area completed the survey.

- 81.5% of respondents were residents of the Berkeley, Sunnyside, West Highland and Highland neighborhoods; 37.1% of those respondents were residents of the Highland neighborhood.
- 32.3% of responses were residential property owners; 15.6% were business owners in the West 38th Avenue area.
- 68% of respondents are female, 85% are white, 15% are Hispanic/Latino and 49% are age 35 to 49. The next largest age cohort was respondents between the ages of 25 and 34 years old (31.1%)
- None of the 214 respondents took the bilingual version of the survey.
- 37.4% of households have annual incomes of \$50,000 to \$99,999, 36% of households report incomes of \$100,000 to \$149,999, and 18% of households report incomes of \$150,000 or more.
- Recurring verbatim response themes to "Other (please specify)" are included in the analysis.

KEY FINDINGS FROM THE WEST 38TH AVENUE SURVEY

- Nearly 71% of respondents felt that the West 38th Avenue corridor has improved over the past five years.
- Respondents rated cleanliness and safety, new restaurants and entertainment, a better retail mix, and a better image/reputation as top factors in recent improvement to the corridor.
- The most important factors for future improvement of West 38th Avenue were projects to improve the pedestrian environment including signalized cross-walks, safety, repair and filling of business vacancies, new restaurants and entertainment and a better retail mix.
- Respondents identified pedestrian environment improvements (40.9%) as the one top factor that is important for the future of the corridor.
- Reported area household incomes are higher than the City and County of Denver's median household income of \$46,410.*

**source 2009 ACS*

PROFILE OF SURVEY RESPONDENTS

Survey respondents were generally female (68.1%), 85.4% were white and 14.6% Hispanic/Latino. 49.1 % of survey respondents were between ages 35 to 49, and 31.1% of respondent were age 25 to 34. 37.4% of households have annual incomes of \$50,000 to \$99,999, while 54% of households report incomes of \$100,000 or greater.

Profile of Survey Respondents	
Race/Ethnicity	
White	85.4%
Hispanic/Latino	14.6%
Gender: Female	
68.1%	
Age	
Younger than 18	0.0%
18 to 24 years	1.8%
25 to 34 years	31.1%
35 to 49 years	49.1%
50 to 69 years	15.6%
More than 69 years	2.4%
Annual Household Income	
Less than \$25,000	0.0%
\$25,000 to \$49,999	8.6%
\$50,000 to \$99,999	37.4%
\$100,000 to \$149,999	36.0%
\$150,000 to \$199,999	13.7%
\$200,000 or more	4.3%
Type of Respondent	
Commercial Property Owner	6.6%
Business Owner	15.6%
West 38 th Avenue Corridor Employee	4.8%
Residential Property Owner	32.3%
Berkeley Resident	19.2%
Sunnyside Resident	13.8%
West Highland Resident	11.4%
Highland Resident	37.1%
Charitable/Non-Profit	3.6%
Government	0.6%
Other	4.2%

WEST 38TH AVENUE IMPROVEMENTS

The following questions explore current respondent perceptions of West 38th Avenue, and what factors have improved the corridor or would improve the corridor within the next five years.

Current Perception of West 38th Avenue: Respondents were asked if they felt that West 38th Avenue had improved over the past five years. Nearly 71% responded that they felt that the corridor had improved. Many respondent comments indicated that while West 38th Avenue has improved somewhat, in particular west of Lowell, there are other areas in need of improvement.

Do you feel that the West 38 th Avenue Corridor has improved over the past five years?	
Yes	70.8%
No	29.2%

Factors That Were Important in Improving the Corridor: Respondents who felt that the West 38th Avenue corridor had improved over the past five years were asked to rate a variety of factors that they considered were important in improving the corridor from “Very Important” to “Not Important”. In order of greatest to least importance, respondents cited cleanliness and safety, new restaurants and entertainment, a better retail mix, and a better image/reputation as top factors in recent improvements to the corridor. Improved communications between commercial and residential stakeholders and special events followed as factors in the corridor’s improvement.

If YES, which factors have been important in improving West 38 th Avenue?						
	Very Important	Important	Neutral	Somewhat Important	Not Important	Don't Know/ No Opinion
Better Image/Reputation	38.7%	41.6%	10.2%	4.4%	0.7%	4.4%
Communication between business owners, property owners and the neighborhoods	20.0%	32.6%	18.5%	4.4%	1.5%	23.0%
Cleaner and Safer	59.7%	29.5%	5.0%	2.9%	0.0%	2.9%
Special Events	11.8%	32.4%	29.4%	9.6%	4.4%	12.5%
New Restaurants and Entertainment	49.3%	41.5%	5.6%	2.1%	0.0%	1.4%
Better Retail Mix	43.6%	45.0%	7.9%	14%	0.0%	2.1%
Other	19.5%	9.8%	26.6%	0.0%	0.0%	43.9%

Factors That Will Be Important in Improving the Corridor: Respondents were asked to rate a variety of factors that they consider will be important in improving the corridor in the next five years from “Very Important” to “Not Important”. The most important factors for future improvement of West 38th Avenue were projects to improve the pedestrian environment including signalized cross-walks, safety, repair and filling of business vacancies, new restaurants and entertainment and a better retail mix.

What factors will be important in improving West 38 th Avenue in the next five years?						
	Very Important	Important	Neutral	Somewhat Important	Not Important	Don't Know/ No Opinion
Projects to improve the pedestrian environment, i.e. lighting, landscaping or other streetscape improvements	74.6%	22.0%	1.7%	0.6%	0.6%	0.6%
Improve condition of roadways	29.8%	39.3%	19.0%	5.4%	6.5%	0.0%
Improve safety	58.6%	31.4%	5.9%	3.6%	0.0%	0.6%
Bicycle program	41.1%	31.0%	19.6%	3.0%	5.4%	0.0%

If YES, which factors have been important in improving West 38th Avenue? (continued)						
	Very Important	Important	Neutral	Somewhat Important	Not Important	Don't Know/ No Opinion
More restaurants and entertainment	52.1%	35.5%	7.1%	2.4%	3.0%	0.0%
Diversify retail and business mix	48.0%	36.8%	10.5%	4.1%	0.0%	0.6%
Beautification contests and awards	19.6%	35.6%	31.3%	5.5%	6.7%	1.2%
Streetcar/specialty shuttle	23.4%	24.6%	28.7%	8.4%	12.0%	3.0%
Signalized cross-walks	45.5%	32.3%	15.0%	3.6%	3.0%	0.6%
Repair and fill vacancies	48.2%	42.9%	6.0%	0.6%	0.6%	1.8%
Better communication between business owners, property owners and the neighborhoods	26.3%	36.5%	25.7%	3.0%	0.6%	7.8%
More convenient parking	23.7%	32.0%	29.6%	8.9%	5.3%	0.6%
Stronger marketing, public relations and events to build a positive identity	33.9%	43.0%	17.6%	3.6%	1.2%	0.6%
More arts and culture	31.2%	41.2%	18.2%	4.1%	4.7%	0.6%
Other	29.7%	10.8%	24.3%	0.0%	0.0%	35.1%

Most Important Factor That Will Be Important in Improving the Corridor: Respondents were asked to identify the one top factor that they consider will be important in future improvements to the corridor. Projects to improve the pedestrian environment (40.9%), was the top factor, followed by more restaurants and entertainment (11.0%) and a more diverse retail and business mix (10.4%).

A VISION FOR WEST 38TH AVENUE

Respondents were asked to list three phrases that would describe their vision five years into the future of the West 38th Avenue Corridor. The top three recurring themes were:

- "Walkable and pedestrian friendly"
- "Safe and clean"
- "More trees and green space"

On the following page is a visualization, or "word cloud" which draws each key word at a size proportional to the frequency of its occurrence in responses to the question.



SURVEY CROSS-TABULATIONS

Survey results were cross-tabulated by the following:

- Age
- Annual household income

Cross-Tabulation by Respondent Age: The following attributes were noted by respondent age in the highest response groupings of 25 to 34 (31.1%), 35 to 49 (49.1%) and 50 to 69 (15.6%):

- Younger respondents (80%) felt more inclined to agree that West 38th Avenue has improved compared to older respondent groups.
- Among all respondent groups, more convenient parking and a street car or specialty shuttle rated lowest as factors that could improve the corridor in the next five years.
- Respondents age 25 to 34 identified more restaurants and entertainment as the second most important factor for the future improvement of the corridor.
- Respondents age 50 to 69 cited better communications between business owners, property owners and the neighborhoods as the second most important factor for improving the corridor in the future.
- 38% of respondents age 50 to 69 were business owners.
- 42% and 40% of respondent groups age 25 to 34 and 35 to 49 respectively, identified themselves as Highland residents.
- 40% of Hispanic/Latino respondents were age 50 to 69.
- Nearly 44% of respondents age 25 to 34 report annual household incomes of \$100,000 to \$149,999.

Cross-Tabulation by Annual Household Income: The following attributes were noted by respondent annual household income ranges of less than \$100,000 and greater than \$100,000:

- Respondents with incomes of less than \$100,000 feel that special events have been important in improving West 38th Avenue while other respondents were neutral about the importance of special events in improving West 38th Avenue.
- Most respondents with incomes of \$100,000 or more characterized themselves as Highland residents.
- 50% of commercial property owners and 50% of business owners report annual household incomes of \$200,000 or more.
- The majority of respondents with incomes of \$100,000 or greater were age 35 to 49.