



Appendix C: Existing Conditions Report

MISSOULA FRONT STREET: ONE-WAY TO TWO-WAY DOWNTOWN STREET CONVERSION

Overview of Existing Economic Conditions, Plans, and Forecasts Affecting the Study Area

This section provides an overview of existing economic conditions, plans and forecasts relevant for and affecting the study area. This includes the discussions of specific situations and plans in the study area itself as well as in the entire City of Missoula and Missoula County. The references to a broader geographic area are partly driven by data availability and by the fact that the study area does not and cannot function in isolation but is affected by the situation and trends in the rest of the city and the county.

For some statistics, comparison with the entire state of Montana and all of US are made to shed additional light on the relative performance and strength of the various trends.

Economic Trends and Recent Performance in Missoula City and County

Table 1 shows employment and unemployment rate in Missoula city over the period from 2003 to 2013. The corresponding figures for Missoula County, state of Montana, and all of United States are also shown for comparison.

The table shows that overall over the period examined Missoula performed economically slightly better than the County, the entire state and all of the US. In particular, the unemployment rate was lower than in all of the US and tended to be slightly lower on average than in the entire state and the entire Missoula County.

However, Missoula was relatively hard hit by the recent economic recession. Over the period from the pre-recession year of 2007 until 2010, total employment in Missoula fell by 8.3%. By comparison, total employment in Missoula County, all of Montana, and all of United States fell by less than 5%. Following the recession, the growth in employment was rather modest, and only 2013 generated a significant employment growth of 3.8%. This rate of growth helped increase the average rate of employment growth in Missoula over the period 2003-2013 to 1%. This rate is higher than that for the county, the entire state, and nationwide.

Nevertheless, as of the end of 2013, total employment in Missoula is 3.4% below the pre-recession peak in 2007. For comparison, the pre-recession employment has been re-gained in Missoula County and almost re-gained in the entire state of Montana. Across all of the United States, 2013 employment was 1.5% below the 2007 peak of employment.

Table 2 shows the number of business establishments and employment by industry in Missoula County. The table shows that over the period 2007-2010, total number of businesses fell by 6.1% (or 267 businesses) and employment fell by 5%.

In relative and absolute terms large losses were suffered by the construction industry (25.5% or 142 establishments and 33.8% of employment), wholesale trade (15.3% or 31 establishments and 14% of employment), finance and insurance and real estate (combined loss of 9.3% or 46 establishments and 4.8% of employment). Manufacturing also suffered a substantial loss in employment. However, this was likely a continuation of earlier trends, rather, than a specific impact of the recession.

An exception to these declining trends was growth in the number of establishments and employment in professional, scientific and technical services, educational services, and health care and social assistance.

By 2011, health care and social assistance emerged as the largest employer (with 22.2% of total employment in Missoula County) followed by retail trade (with 17.1% of employment), and accommodation and food services (with 12.4% of total employment).

Table 1: Employment and Unemployment Trends in Missoula City, Missoula County, All of Montana, and All of United States

	Missoula City			Missoula County			All of Montana			All of United States		
	Employment	Emp. Growth	Unemp. Rate	Employment	Emp. Growth	Unemp. Rate	Employment	Emp. Growth	Unemp. Rate	Employment (Thousands)	Empl. Growth	Unempl. Rate
2003	32,359		4.2%	54,296		3.7%	450,190		4.3%	137,729.3		6.0%
2004	32,544	0.6%	4.0%	54,608	0.6%	3.6%	456,385	1.4%	4.0%	139,239.8	1.1%	5.5%
2005	33,028	1.5%	3.6%	55,419	1.5%	3.3%	463,251	1.5%	3.6%	141,710.1	1.8%	5.1%
2006	33,850	2.5%	3.3%	56,798	2.5%	3.0%	476,412	2.8%	3.2%	144,417.6	1.9%	4.6%
2007	36,805	8.7%	3.1%	57,285	0.9%	3.3%	485,500	1.9%	3.4%	146,050.2	1.1%	4.6%
2008	36,312	-1.3%	4.1%	56,538	-1.3%	4.4%	486,803	0.3%	4.5%	145,373.3	-0.5%	5.8%
2009	35,126	-3.3%	5.0%	54,811	-3.1%	5.6%	465,005	-4.5%	6.0%	139,893.9	-3.8%	9.3%
2010	33,747	-3.9%	6.1%	54,607	-0.4%	6.7%	462,278	-0.6%	6.8%	139,076.0	-0.6%	9.6%
2011	33,742	0.0%	6.1%	54,608	0.0%	6.3%	466,372	0.9%	6.6%	139,879.0	0.6%	8.9%
2012	34,235	1.5%	5.5%	55,404	1.5%	5.9%	477,050	2.3%	6.0%	142,465.7	1.8%	8.1%
2013	35,542	3.8%	4.3%	57,520	3.8%	4.6%	481,019	0.8%	5.0%	143,929.9	1.0%	7.4%
Average 2003-2013		1.0%	4.5%		0.6%	4.6%		0.7%	4.9%		0.5%	6.8%
Loss of Employment in Recession 2007-2010, Percent	-8.3%			-4.7%			-4.8%			-4.8%		
2013 Employment as Percentage of 2007	96.6%			100.4%			99.1%			98.5%		

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, and Labor Force Statistics. Note that for Missoula City, Missoula County, and State of Montana, 2013 figure represents monthly data for the month of November. Figures presented in the bottom three rows are HDR calculations based on data displayed in the table.

Table 2: Number of Business Establishments and Employment by Industry in Missoula County

Industry	2007		2011		Percent Change 2007-2011		Percent Distribution 2011	
	Number of Business Estab	Employment	Number of Business Estab	Employment	Number of Business Estab	Employment	Number of Business Estab	Employment
Total for all sectors	4,348	48,621	4,081	46,175	-6.1%	-5.0%		
Agriculture, forestry, fishing and hunting	70	416	49	226	-30.0%	-45.7%	1.2%	0.5%
Mining	8	NA	10	51	25.0%	NA	0.2%	0.1%
Utilities	7	177	7	172	0.0%	-2.8%	0.2%	0.4%
Construction	557	3,218	415	2,129	-25.5%	-33.8%	10.2%	4.6%
Manufacturing	110	2,270	107	1,366	-2.7%	-39.8%	2.6%	3.0%
Wholesale trade	203	1,973	172	1,696	-15.3%	-14.0%	4.2%	3.7%
Retail trade	584	8,759	561	7,908	-3.9%	-9.7%	13.7%	17.1%
Transportation and warehousing	161	2,021	148	2,507	-8.1%	24.0%	3.6%	5.4%
Information	97	1,272	80	1,916	-17.5%	50.6%	2.0%	4.1%
Finance and insurance	271	1,996	245	1,924	-9.6%	-3.6%	6.0%	4.2%
Real estate and rental and leasing	222	924	202	857	-9.0%	-7.3%	4.9%	1.9%
Professional, scientific, and technical services	474	2,878	501	2,971	5.7%	3.2%	12.3%	6.4%
Management of companies and enterprises	19	1,051	14	368	-26.3%	-65.0%	0.3%	0.8%
Administrative and support and waste management services	222	3,504	225	2,152	1.4%	-38.6%	5.5%	4.7%
Educational services	53	444	60	469	13.2%	5.6%	1.5%	1.0%
Health care and social assistance	465	7,976	482	10,255	3.7%	28.6%	11.8%	22.2%
Arts, entertainment, and recreation	119	1,529	114	1,374	-4.2%	-10.1%	2.8%	3.0%
Accommodation and food services	334	6,081	331	5,735	-0.9%	-5.7%	8.1%	12.4%
Other services	369	2,095	350	2,090	-5.1%	-0.2%	8.6%	4.5%

Source: US Census Bureau, County Business Patterns and HDR calculations.

Table 3 shows the number of business establishments in ZIP Code Area 59802 which covers part of Missoula including its downtown district where the study area is located. Although not specific for the study area, assuming a higher concentration of businesses towards the downtown areas, this area can be treated as broadly representative of trends and conditions facing the study area as well.

As the table shows in the first row, between 2007 and 2011 the number of businesses declined by 5.1%. This rate is slightly lower than in all of Missoula County (6.1% as shown in

Table 2). However, for some industries, the decline was larger than in the county on average. These industries include wholesale trade, retail trade, transportation, information, and arts and entertainment. At the same time, the number of businesses in real estate, professional and scientific services, health care, and food and accommodation services actually increased over the same period.

Table 3: Business Establishments in ZIP Code 59802

Industry Code Description	Number of Establishments		Percent Change 2007-2011	Est. Percent Distribution 2011
	2007	2011		
Total for all sectors	941	893	-5.1%	
Forestry, fishing, hunting, and Agriculture Support	7	7	0.0%	0.8%
Mining, quarrying, and oil and gas extraction	3	3	0.0%	0.3%
Utilities	1	1	0.0%	0.1%
Construction	64	49	-23.4%	5.5%
Manufacturing	20	19	-5.0%	2.1%
Wholesale trade	44	33	-25.0%	3.7%
Retail trade	115	109	-5.2%	12.2%
Transportation and warehousing	28	22	-21.4%	2.5%
Information	26	18	-30.8%	2.0%
Finance and insurance	64	53	-17.2%	5.9%
Real estate and rental and leasing	43	47	9.3%	5.3%
Professional, scientific, and technical services	165	169	2.4%	18.9%
Management of companies and enterprises	7	5	-28.6%	0.6%
Administrative and Support and Waste Management Services	42	42	0.0%	4.7%
Educational services	13	12	-7.7%	1.3%
Health care and social assistance	96	107	11.5%	12.0%
Arts, entertainment, and recreation	26	20	-23.1%	2.2%
Accommodation and food services	85	91	7.1%	10.2%
Other services (except public administration)	92	86	-6.5%	9.6%

Source: US Census Bureau, ZIP Code Business Patterns and HDR calculations.

The industrial structure resulting in 2011 features a much higher share of businesses in professional and scientific services as well as accommodation and food services than at the entire county level.

In summary, the data and analysis above lead to the following key conclusions:

- On average, Missoula City and County performed economically slightly better than the entire state or all of the United States over the period 2003-2013 as measured by the average rate of unemployment.
- Missoula was affected by the recent economic recession to a greater extent than the county, the entire state, or all of the United State by experiencing a much larger decline in employment than the other areas.
- Although there was a strong employment growth in 2013, current employment level remains below the pre-recession employment peak.
- Areas close to the city core experienced a somewhat mixed performance. While the number of some businesses that are typical for downtown areas, such as retail, art and entertainment or finance and insurance establishments declined, the number of other businesses such as professional services, real estate, and accommodation and food services actually increased.

Conditions in Downtown and Streets Slated for Conversion

Table 4 below shows the downtown business statistics by broad sector of activity in terms of the number of establishments, square footage (SF) of their premises, annual sales and employment. The table shows that over half of all establishments present in Missoula downtown are various consumer services businesses which include various professional services, personal services, hotels, medical offices, etc. They also occupied nearly half of all SF. Retail and food and beverage establishments accounted jointly for over one quarter of all establishments and over 16% of SF. Government and non-profit organization accounted for about 10% of all establishments but occupied over 25% of space.

The table also shows that there are 70 vacant establishments with over 300,000 SF accounting for about 9% of all establishments and nearly 13% of total space.¹ Employment in downtown amounts to about 4,200. Except for government services, average establishment is rather small with less than 10 employees.

¹ This rate can be considered relatively high but not unusually high. Based on Avison Young 2014 Annual commercial real estate review and forecast, office space vacancies in the US markets currently range from about 8% to as much as 20% in some communities. Based on 2013 Blue Book (or Semi-Annual Market Intelligence Report for commercial real estate) by Coldwell Banker Commercial, in 2012 and 2013 the average national retail vacancy rate amounted to just below 12%.

Table 4: Downtown Business Statistics by Sector

Sector	Total Square Footage (SF)	Number of Est.	Average SF/Est.	Annual Sales/ Revenues	Employment	Sales per Est.	Employment per Est.	Percentage of Total			
								Square Footage	Number of Est.	Sales	Employment
Consumer Services	1,177,107	412	2,857	\$301,543,933	2,631	\$731,903	6.4	49.2%	53.8%	46.4%	62.1%
Retail	270,541	133	2,034	\$31,278,766	235	\$235,179	1.8	11.3%	17.4%	4.8%	5.5%
Food and Beverage	120,162	72	1,669	\$50,383,870	268	\$699,776	3.7	5.0%	9.4%	7.7%	6.3%
Government	325,854	30	10,862	\$182,215,416	787	\$6,073,847	26.2	13.6%	3.9%	28.0%	18.6%
Non-Profit	194,386	49	3,967	\$85,093,623	316	\$1,736,605	6.4	8.1%	6.4%	13.1%	7.5%
Vacant	306,271	70	4,375					12.8%	9.1%		
Total	2,394,321	766		\$650,515,608	4,237						

Source: "Missoula Downtown Building and Business Inventory", Missoula Downtown Association, May 25, 2012.

To obtain some insights regarding the business conditions prevailing more specifically in the two streets slated for traffic conversion, Google maps with street views for the study area were examined to determine the number and type of businesses located there. It should be acknowledged that this source may not be exhaustive and fully accurate. In particular, it may not capture all tenants in larger structures such as office buildings with rental office space, or shops which have just recently closed down or moved. However, it should provide a good sense of the overall conditions and the type of businesses on the ground level fronting the street.

An inventory of businesses was compiled based on listings marked on Google maps in early February 2014. Each business was classified into the following sectors:

- Retail: various types of retail trade businesses, including clothing, shoes, specialty stores, second hand stores, pawn stores, etc.
- Restaurant/Bar: various types of eating places, including restaurants, bars, bistros, and coffee shops.
- Financial: establishments offering financial services in the area of banking, financial planning and management, insurance, etc.
- Professional Services: establishments offering various types of professional services and consulting in areas such as engineering, law, architecture.
- Other: all other establishments including private and public/government organizations such as personal care services, repair services, educational services, not-for-profit organizations, etc.

The literature on conversion of one-way streets to two-ways points out that one-way street network may be confusing to visitors, or infrequent users who – because of the one way of traffic direction – have some difficulty in navigating through the area. As a result, they may not be able to notice some establishments that could be of interest to them. In addition, on a one-way street, ground businesses are exposed only to traffic travelling in one direction, and even that exposure may be reduced due to higher speeds in on one-way streets.

As a result, the literature points out businesses which are most likely to benefit from a street conversion from one-way to two-way traffic are businesses which depend to a large extent on pass-by traffic or spontaneous and casual customer visits. Such visits are by those customers who just happen to be in the area, who don't know the area very well (including tourists), and thus visit those businesses which can be more easily noticed and which are more easily accessible.

The businesses deemed to depend substantially on spontaneous visits include retail stores, personal care, bars and restaurants, in particular if they are relatively small and perhaps are not widely known in the community and do not have an established reputation.² In contrast, businesses from other industrial sectors, or larger well known businesses are deemed to depend to a greater extent on planned destination visits, or trips which are intentionally made for a specific purpose and to a specific location. Those businesses are not expected to be affected by the traffic flow in a significant way.

Therefore, each business was marked whether it depends substantially on casual customer visits or not.

² For example, see: Vikashv Gayah, "Two-Way Street Networks: More Efficient than Previously Thought?" Access, Number 41, Fall 2012 as well as http://www.raisethehammer.org/article/1605/a_business_case_for_conversion_from_one-way_to_two-way_streets.

This exercise was performed for Front Street and Main Street, as well as for a comparison, for Higgins Avenue (the section from Front Street to Spruce Street). Table 5 shows the results in terms of the number of businesses by category, the number and percentage of businesses deemed to depend on spontaneous visits.

Table 5: Inventory of Businesses in Study Area

Sector	Number of Est.	Share
<i>FRONT STREET AND MAIN STREET</i>		
Retail	8	13.1%
Restaurant/Bar	14	23.0%
Financial	6	9.8%
Professional Services	6	9.8%
Other	27	44.3%
TOTAL FRONT & MAIN STREETS	61	
Businesses Dependent on Spontaneous Trips	24	39.3%
<i>HIGGINS AVENUE (FRONT TO SPRUCE STREETS)</i>		
Retail	19	43.2%
Restaurant/Bar	12	27.3%
Financial	3	6.8%
Professional Services	1	2.3%
Other	9	20.5%
TOTAL HIGGINS AVENUE	44	
Businesses Dependent on Spontaneous Trips	32	72.7%

Source: Compiled by HDR based on examination of Google maps in first week of February 2014.

Table 5 shows that on Front Street and Main Street combined, 61 businesses were identified. It should be noted that street views indicated many vacant spaces/establishments with “For Lease” signs, including former Macy’s store on the corner of Front Street and Higgins Avenue. This is consistent with the downtown business inventory findings of many vacant establishments and spaces. Google Maps also displayed a few residential complexes on both streets.

From the businesses identified, 44% fell into the category of “Other”. Some of the organizations included this category were Missoula Library, Days Inn hotel, Missoula Parking Commission, Missoula Downtown Association, a fitness club, and a dance studio. On the other hand, there were just 8 retail stores and 14 restaurants or bars accounting for 13% and 23% of all businesses, respectively (and a combined total of 36%). In total, businesses deemed to depend on spontaneous trips accounted for 39% of the total.

For comparison, 44 businesses were identified on Higgins Avenue in its downtown core section (from Front Street to Spruce Street). 19 of these businesses were retail stores and 12 were restaurants (43% and 27% of total, respectively). In total, businesses deemed to depend on spontaneous trips accounted for nearly 73% of the total.

This analysis suggests that the number of businesses which are likely to experience significant and quick benefits from the change in the pattern of traffic is relatively small, smaller than on other streets in this

downtown's "retail hot spot" area but higher than in the entire downtown on average (based on data on downtown businesses shown in Table 4.).

However, it should be pointed out that the business structure that we currently observe is likely a result of adjustments to the existing overall conditions, including traffic circulation. Over time, as the traffic pattern changes, the business structure may change as well. At a minimum, new specialty retail stores and restaurants could open in vacant spaces. This will contribute to the increase in overall business and vitality of Missoula's downtown.

Development Plans and Proposals Affecting the Study Area

Conversion of Front Street and Main Street from one-way to two-way operations was envisioned as one element of the 2009 *Greater Missoula Downtown Master Plan*, a strategy for strengthening and expanding downtown's role in the community. The *Downtown Master Plan* outlined the vision for the downtown area in terms of the functions and activities that should be supported and strived for so as to achieve the desired mix of uses and level of activities. The *Downtown Master Plan* also outlined the traffic circulation framework and more specific development and redevelopment projects that would best support its vision.

The *Downtown Master Plan* forecasted significant growth in the downtown area over 25 years and specifically the following additional development in terms of SF occupied:³

- Retail: 220,000 SF;
- Office: 677,000 SF;
- Commercial: 376,000 SF;
- Government: 82,000 SF;
- Arts & Entertainment: 178,000 SF;
- Parks & Open Spaces: 1,232,000 SF;
- Public Parking: 1,915 Spaces;
- Private Parking: 5,490 Spaces;
- Residential: 2,840 Units, and
- Hotel: 280 Rooms.

Some of these projects were forecasted specifically for Front Street and Main Street which in the plan are in the center of downtown commercial core referred to as "Retail Hotspot". These projects – seen as catalysts of development – included the following:⁴

- Front Street Parking Structure—A new parking structure adjacent to (now former) Macy's building and First Interstate Bank.
- 139 East Main Street Mixed-Use Project—New and renovated retail/ restaurant, hotel and condominiums complex.
- Orange and Main Retail Anchor—New retail anchor and housing on the west end of the Retail Hot Spot.

³ 2009 *Greater Missoula Downtown Master Plan*, page 8.

⁴ The plan also included Macy's improvements with renovations, remodeling and expansion of the store. These became inconsequential after the store closure.

- Front Street Realignment–New Front Street realignment and utility relocations needed to assemble a site for the Orange and Main Retail Anchor.
- Orange and Main Parking Structure–A new parking structure opposite the Riverfront Triangle, and the Orange and Main Retail Anchor.

The parking structure on Front Street has recently been completed. Regarding the property on 139 East Main Street, the City obtained in 2011 an application from Ryan Montgomery for development of a microdistillery with a tasting room. The application was approved. However, the facility opened in September 2012 in a different location on 129 Front Street. Regarding other development and redevelopment projects, no published references could be found regarding their progress or planning status.

It is noted, however, that the amount of vacant space (in vacant establishments) amounting to 306,271 SF (see Table 4) exceeds the additional future retail space requirements, or accounts for 45% of future commercial space requirements forecasted in the 2009 Downtown Master Plan. Therefore, in the near term, the downtown business community may have sufficient capacity available for expansion, or re-development.

In addition, the City of Missoula initiated redevelopment of a portion of Riverfront Triangle Urban Renewal District known as the Fox Site. The Fox Site is located along the north shore of the Clark Fork River at the southwest corner of the intersection of Orange and West Front Streets. The Fox Site is envisioned to accommodate multi-use development which would form the anchor of the west entrance to the downtown core and the east entry to the West Broadway corridor. The City has directed MRA to seek an appropriate private development team to realize this vision, and a request for proposal was issued in May 2011.

The successful proponent, Developers Hotel Fox LLC, hopes to turn the 6-acre area into a hotel and convention center with the possibility of housing, offices, restaurants, and retail. The hotel study was completed in 2012. Recently, Mayor John Engen asked the developers to work on a much larger scheme, including re-working of parking in the area in conjunction with St. Patrick Hospital.⁵ In January 2014, the developer obtained one additional year to finalize plans with a new deadline in 2015.⁶

Future Economic Outlook for Missoula

University of Montana's Bureau of Business and Economic Research forecasts for 2014 slow but steady growth.⁷ Overall, in 2014 Missoula County residents could expect a 2.7% increase in nonfarm labor earnings. This is a slight revision upwards compared to the 2013 forecast for Missoula that anticipated a rate of growth in labor earnings of 2.4% through to 2016.⁸ This forecast for Missoula compares against a statewide forecast of labor earnings of 3.1% (and a similar growth through to 2017).

One of the sectors currently experiencing growth and a positive outlook for the near term is manufacturing, including the forest products sector. This is partly driven by an increase in construction activity as manifested through a statewide increase in building permits and sales.

⁵ <http://montananewsnow.com/missoulanewsnow/>

⁶ Based on NBC Montana (January 8, 2014): <http://www.nbcmontana.com/news/city-grants-developers-additional-year-to-finalize-plans-for-former-fox-theater-site/23838276> and <http://www.kpax.com/news/missoula-leaders-look-at-new-extension-for-hotel-fox-project/>.

⁷ See "Missoula industries growing but slowly, experts say in economic forecast", Missoulian, February 1, 2014, http://missoulian.com/news/local/missoula-industries-growing-but-slowly-experts-say-in-economic-forecast/article_32b6bf06-8aeb-11e3-a827-001a4bcf887a.html.

⁸ See "2013 Economic Outlook. Missoula County," University of Montana's Bureau of Business and Economic Research.

Another positive factor for manufacturing is a more general trend phrased as “re-shoring”, or a trend towards moving manufacturing back to North America. As pointed out in some analyses, there is growing evidence that wages and benefits in popular off-shore countries such as China are increasing narrowing the compensation advantages as compared to American workers.⁹ Costs associated with energy, transportation of goods, logistics management, and customer service are also being recognized as important and frequently lower with domestic production.

Other areas that could see strong growth in Missoula in 2014 are commercial and public development and redevelopment projects (some of them already in progress). These include the following:¹⁰

- South Crossing shopping center, redevelopment of a retail complex including demolition of a former vacant Kmart building and construction of new retail structures.
- Old Sawmill District a multi-use, multi-residential project adjacent to the downtown core.
- Silver Park, a nearly 15-acre park being developed in conjunction with the Old Sawmill District project that features a riverfront trail, pavilion, bench shelters, parking lot and boat ramp in addition to open space. Current construction includes placement of a pedestrian bridge at the west end of the trail near California Street Bridge and installation of landscaping and lighting along the riverfront trail.
- University new construction projects – including Missoula College – valued at more than \$51 million.

Challenges for the Missoula area include millions of dollars worth of anticipated budget cuts at the University of Montana,¹¹ as well as layoffs and budget cuts at Missoula’s hospitals.¹² It has been noted that health care spending has slowed, partly due to the Affordable Care Act and partly due to trends that emerged before the law was passed, such as growing patients’ deductibles which in turn impacted the demand for health services.

In the longer term, projected job growth in all of Montana over the years from 2014 to 2021 is expected to be at 1.4% to 1.5% annually.¹³ Projected growth varies by industry, however, with the fastest growth expected in health care, business services, and natural resources (particularly mining of oil and gas). The development of the Bakken oil shale is expected to increase growth in the oil and gas industry, and also spur growth in related construction and business services sectors. However, job growth in the next few years is likely to be slower than the previous years because of decreased demand from a slow global economy.

The above annual employment growth projections for all Montana are also consistent with 2008 projections prepared for the update of the Missoula International Airport Master Plan. The set of forecasts prepared for that update also included economic forecasts for the Missoula County (as well as other Montana counties considered to be in the airport’s service area). Based on these forecasts, the average

⁹ “Montana’s Manufacturing Industry. Outlook for Continued Improvement”, Manufacturing Outlook 2013, University of Montana’s Bureau of Business and Economic Research.

¹⁰ See http://missoulain.com/news/local/missoula-industries-growing-but-slowly-experts-say-in-economic-forecast/article_32b6bf06-8aeb-11e3-a827-001a4bcf887a.html and <http://www.ci.missoula.mt.us/103/Major-Projects>.

¹¹ See “UM departments prepare for \$9.5M in budget cuts”, Missoulain, March 22, 2014.

¹² See “Community Medical Center cuts 20 jobs, furloughs more workers”, Missoulain, October 19, 2013.

¹³ See “Montana Employment Projections 2011-2021”, Montana Department of Labour and Industry, 2012.

annual employment growth in Missoula County until 2026 is forecasted at about 1.8% to 2% annually which can be considered a strong growth.¹⁴

In conclusion, the forecasts for Missoula feature somewhat cautious but positive projections of growth in the near term. Although the forecasts in earnings and employment can be interpreted as reasonably strong, there is some uncertainty as to how some of the anticipated cuts in the public sector will unfold. Growth should continue in the longer term given the overall good outlook for the entire state.

Expected Economic Changes in the Study Area due to Street Conversion

This section provides a discussion of changes in the study area that can be expected as a result of the proposed conversion from one-way to two-way traffic. The overall assessment is based on putting together insights and implications from three components: (1) experience with street traffic conversion projects in other jurisdictions, (2) changes in traffic volumes in the study area resulting from changes from one-way to two-way traffic pattern and other changes in the configuration and layout of the affected streets that impact flow of vehicles, pedestrians and bicyclists, and (3) overall economic conditions in Missoula, other development or redevelopment projects in the vicinity of the study area and general economic outlook for Missoula. Item (3) on this list was addressed in detail in the previous section. This section, therefore, discusses more specifically components (1) and (2) and concludes with an overall assessment of likely future changes in economic conditions in the study area.

Experience with Street Conversion Projects in Other Jurisdictions

Business communities tend to favor two-way street designs to one-way and believe that in general the former is better for business than the latter. As an example, a survey of businesses conducted for a proposed conversion from two-way to one-way couplets (pairs of streets with one-way traffic in opposite directions) in Kelowna, British Columbia, revealed that 50% of businesses believed that the conversion will have a negative impact on their property or business. The remaining 50% were almost equally split between positive impact and no significant impact responses (23% and 27%, respectively).¹⁵ Similarly a survey of businesses in Westbank (on the other side of Lake Okanagan across from Kelowna) regarding their views on the existing street network (that also included one-way couplets) indicated that 56% of businesses thought that location on a one-way street was bad. The main reason for the beliefs regarding the negative impact of a one-way street network was the impact on accessibility by car and thus customers arriving by car.

Consistently with these surveys, many analyses of conversions from one-way to two-way streets report overall success and satisfaction from the outcomes. However, it should be pointed out that many street conversions projects were conducted in conjunction with other measures and elements of a wider plan of revitalization and redevelopment. Other elements of such plans often included other changes in traffic flow, improvements in intersections and traffic lights, relocation of railroad tracks, and a general street beautification. In many cases, conversion was taking place when some redevelopment activities in the impact area were already noticeable as emerging trends. In these cases, the street conversion played a role of an additional catalyst.

¹⁴ See "Missoula International Airport Master Plan Update. Chapter 1: Aviation Forecasts", Table 1-5, April 2008, a report prepared for Missoula County Airport Authority by CH2MHILL.

¹⁵ See City of Kelowna and Downtown Kelowna Association, "One Way Couplets Impact Analysis", Final Report July 2003, Section 6.4.

The table below provides an overview of a sample of street conversions and general results quoted here from literature reviews conducted in other studies.¹⁶

Table 6: Impacts of Street Conversion Projects in Other Jurisdictions

NO.	CITY, SCOPE OF PROJECT AND YEAR	REPORTED IMPACTS
1	Des Moines, Iowa: Court Avenue, Walnut Avenue, Locust Street, 2006	<ul style="list-style-type: none"> ▪ \$2.75 billion invested in public and private capital projects. ▪ Addition of over 520,000 square feet of new office space. ▪ Increase in office vacancy rate from 6.2 percent to 7.5 percent due to the large increase in the amount of office supply (also implies that much of the new space was rented).
2	Fort Collins, Colorado: Mason and Howe Streets, 2012	<ul style="list-style-type: none"> ▪ Catalyst to development and redevelopment of downtown area; redevelopment through higher density, infill condominium projects. ▪ 11 residential construction projects completed by mid 2000's and additional projects considered for the Mason Street Bus Rapid Transit Corridor (MAX). ▪ Retail space projected to increase over the period of 10 years following conversion by 600%. Property taxes are projected to increase by 885%.
3	Lafayette, Indiana: Main Street, 1994	<ul style="list-style-type: none"> ▪ "Very big plus to retail", in particular specialty stores. Ne specialty retail stores attracted after conversion completed. ▪ \$25 million three building complex with retail/ residential. ▪ Condominium building with 18,500 square feet of retail space, 36 residences, as well as a 140,000 sf of office space.
4	Austin, Texas: Cesar Chavez Street, 2008	<ul style="list-style-type: none"> ▪ Significant new development in the area starting from 2004, including a new Austin City Hall, a residential project with 294 apartments, 185 condominiums, 22,000 square feet of retail, 11,000 square feet of office, and a restaurant, and another high rise residential with 258 rental units and ground floor retail space.
5	Vancouver, Washington: Broadway, Main and "C" Streets, 2007	<ul style="list-style-type: none"> ▪ Increase in retail sale of 10 to 20 percent since street's conversion to two-way. ▪ 71,000 square feet of mixed use commercial complex with 21 luxury condominiums and a 267 space public parking structure. ▪ Several other commercial projects actively planned for the area.
6	West Palm Beach: Clematis Street, 1996	<ul style="list-style-type: none"> ▪ Substantial increase in new retail shops, restaurants, and residential use
7	Toledo, Ohio:	<ul style="list-style-type: none"> ▪ Catalyst for redevelopment: long time vacant buildings occupied or sold to developers for new shops and restaurants.
8	Lafayette, Indiana: Main Street, 1994	<ul style="list-style-type: none"> ▪ Increase in traffic and sales.
9	Hickory North Carolina, Main Street and two other major streets in downtown	<ul style="list-style-type: none"> ▪ Change in city's image to more "user friendly" ▪ Businesses were satisfied with conversions.
10	New Haven, Connecticut: Chapel Street and College	<ul style="list-style-type: none"> ▪ Well received by businesses and the general public. ▪ More "user-friendly" for visitors.

¹⁶ This review is based on literature reviews in the following studies: (1) Conversion of NP Avenue and 1st Avenue in Downtown Fargo. Economic Impact Chapter, September 13, 201, and (2) City of Kelowna and Downtown Kelowna Association, "One Way Couplets Impact Analysis", Final Report July 2003.

	Street, late 1990s to early 2000s	
11	Lubbock, Texas: Main Street	<ul style="list-style-type: none"> Consensus that the conversion was beneficial; downtown started experiencing growth after years of decline.

Systematic studies attempting to disentangle the various influences on street conversion projects and quantify the net impacts are lacking. The study for Kelowna for a conversion from two-way to one-way couplets (therefore an opposite project) concluded that the impact of such conversions will be significant for main historic and commercial corridors of a city. However, for streets which are not major commercial streets, the impact will be limited. Also, office type tenants, or businesses such as bank branches, real estate offices, or dental offices are not expected to be affected. This is because these businesses face little or no competition in the local market; they are major destinations that customers will drive or walk to regardless of the configuration of the local road network.

For the specific conversion project of three streets in downtown Kelowna the study concluded that on two of the streets the expected impact on sales of ground floor businesses deemed sensitive to traffic flow configuration is expected to be negative but low in the range of 5% to 10%. This was because on balance the daily traffic on these streets was expected to remain unchanged, and projected loss of parking was not expected to affect directly these businesses. On the other hand, the impact on many ground floor businesses on the third street considered for conversion was assessed as negative in the medium range of 10% to 20%. This was because the proposed one-way couplet and other street re-configuration were expected to reduce significantly daily traffic on that street.

Key Features and Forecasted Traffic Outcomes of this Street Conversion Project and Its Implications for Economic Conditions in the Study Area

Changes in street configurations, permitted turns or vehicle flows, etc. can be expected to affect the choice of precise travel route through an area and thus have an impact on the amount of traffic in the various streets within that area.

A transportation model was used to simulate the changes in traffic flows due to conversion. The results of these simulations in terms of the traffic volumes by street section and time of day for the situation before and after conversion are shown in Table 7.¹⁷ The table does display some redistribution of traffic in the study area after street conversion. Some street sections are forecasted to experience an increase in traffic in certain times of the day and other street sections are forecasted to experience a reduction.

Main Street from Orange Street to Higgins is forecasted to experience an increase in traffic volumes throughout the day as well as on weekends. However, the remainder of Main Street is expected to see no change or a reduction in traffic (except for morning AM peak on the section from Higgins to Adams). On the other hand, Front Street from Higgins to Adams and from Adams to Madison is forecasted to see an increase in traffic (except for AM peak hour on the section from Higgins to Adams). The section of Front Street from Orange to Higgins is forecasted to see a general reduction in traffic (except for mid-day peak hour which is expected to generate a small increase).

¹⁷ It should be emphasized that the results presented in the table are purely “mechanical” changes influenced by the practicality and convenience of travel on a given street when traveling to a certain destination. In the longer term, further changes in traffic flows may occur depending on the attractiveness of travel on a certain street influenced by factors such as presence of stores, restaurants, and other destination points. This requires more intensive modeling which could not be completed within the scope of this study.

Overall, when summing across the street sections, peak traffic in the study area is expected to increase by almost 9% on a week day and 4% on a weekend. Over the entire day, traffic in the study area is expected to increase by nearly 13%.

Table 7: Traffic Volumes on Main Street and Front Street, by Section, Current and After Conversion (at 2010 traffic levels)

Street Section	Current	After Conversion	Change	Percent Change
Main (Orange to Higgins)*				
AM Peak Hour	240	320	80	33.3%
Mid-Day Peak	400	460	60	15.0%
PM Peak Hour	390	470	80	20.5%
Weekend Peak	390	440	50	12.8%
Daily (ADT)	3900	4700	800	20.5%
Main (Higgins to Adams)				
AM Peak Hour	190	270	80	42.1%
Mid-Day Peak	400	380	-20	-5.0%
PM Peak Hour	440	380	-60	-13.6%
Weekend Peak	450	380	-70	-15.6%
Daily (ADT)	4400	3800	-600	-13.6%
Main (Adams to Madison)				
AM Peak Hour	180	150	-30	-16.7%
Mid-Day Peak	190	190	0	0.0%
PM Peak Hour	280	200	-80	-28.6%
Weekend Peak	160	140	-20	-12.5%
Daily (ADT)	2800	2000	-800	-28.6%
Front (Orange to Higgins)*				
AM Peak Hour	420	340	-80	-19.0%
Mid-Day Peak	420	430	10	2.4%
PM Peak Hour	450	430	-20	-4.4%
Weekend Peak	420	410	-10	-2.4%
Daily (ADT)	4500	4300	-200	-4.4%
Front (Higgins to Adams)				
AM Peak Hour	350	270	-80	-22.9%
Mid-Day Peak	350	420	70	20.0%
PM Peak Hour	310	420	110	35.5%
Weekend Peak	290	370	80	27.6%
Daily (ADT)	3100	4400	1300	41.9%
Front (Adams to Madison)				
AM Peak Hour	110	180	70	63.6%
Mid-Day Peak	160	310	150	93.8%
PM Peak Hour	150	360	210	140.0%
Weekend Peak	110	160	50	45.5%

Street Section	Current	After Conversion	Change	Percent Change
Daily (ADT)	1500	3600	2100	140.0%
TOTAL SUM OF ALL PEAKS	7,250	7,880	630	8.7%
SUM OF WEEK DAY PEAKS	5,430	5,980	550	10.1%
SUM OF DAILY TRAFFIC (ADT)	20,200	22,800	2,600	12.9%
SUM OF WEEKEND PEAKS	1,820	1,900	80	4.4%

*From the point where street branches off to Main Street and Front Street

Regarding the economic impact of increased vehicle traffic on local businesses, it should be pointed out that literature does not offer many insights on buying behavior of drivers and how – and in what magnitude – the increased traffic could translate into increased sales in the areas that they pass. As argued earlier in the general context of impacts of street conversion from one-way to two way traffic, some increase in sales could be expected as more vehicles passing through an area will increase business exposure of local stores. Assuming that each vehicle passing a store has a similar probability of making a stop at that store, increased traffic on a street can be expected to lead to increased sales in some proportion to the increased traffic.¹⁸ These increased sales could represent entirely new sales attracted by more convenient access but also likely some redistribution from areas and street sections where traffic declined, or from outside of the study area.

In addition to changing the flow of car traffic in the two streets in question, this conversion project also proposes a range of street improvements in the study area to enhance pedestrian safety, facilitate access and flow of bicyclists to and through the area, as well as improve the flow of vehicles. These include the following (some changes/installation may not apply to some alternatives considered or to the entire street length):

- Curb extensions at crosswalks so as to reduce the crossing time for pedestrians;
- Bicycle lanes (new or improved), separated on-road, or off-road;
- Turning lanes;
- Raised medians, and
- Changes to some intersections layouts to improve flow and turning conditions for vehicles.

Pedestrian and bicycle traffic was not explicitly estimated in this study. However, the above installations may be expected to encourage more walking and bicycling in or through the study area due to increased safety and user comfort. Increased pedestrian and bicycle traffic may then also have some economic benefits and benefit local businesses as they represent potential new customers. Studies indicate that retailers tend to over-estimate the number of customers who are arriving by car and underestimate those customers who are walking or using a bicycle to get to the store.¹⁹ Those customers may also be very valuable customers. For example, a study of Toronto's Bloor Street found that people who arrive to the local stores by transit, bicycle or foot spend more on a monthly basis than those who arrive by car.²⁰

¹⁸ However, it should be pointed out that we could not refer to a concept of “elasticity of local retail sales with respect to car traffic on the street” which would be similar to the concept of a demand elasticity. For example, price elasticity of demand expresses the percentage increase in demand for a good or service when its price decreases by 1 percent. Elasticities can be estimated using sales data, and there are many empirical studies on elasticity of demand for a number of goods and services. The findings from these studies are then frequently used in economics practice to forecast the impact of incremental changes in demand in response to a change in prices.

¹⁹ As an example, see discussion in “Good for Business. The benefits of making streets more walking and cycling friendly. Discussion paper, The Heart Foundation, November 22, 2011.

²⁰ “Bike Lanes, On-Street Parking, and Business”, Year 2 Report: A Study of Bloor Street in Toronto's Bloor West Village, Clean Air Partnership, 2010.

These study results provided support for street improvement projects involving allocation of greater share of space to sidewalks and bike lanes (at the expense of parking) as such change would be unlikely to negatively impact sales of local merchants. The project could actually increase retail sales as well as generate benefits to a large pool of pedestrians and bike users.

At the same time, studies also show that street improvements involving increased accessibility, connectivity, and safety to bicyclists, transit users, pedestrians, and an increase in quality of the surrounding public/pedestrian space can help improve the sales performance of the businesses on the affected streets. In other words, increased pedestrian and bicycle traffic after the improvements may bring new sales as well. For example, a recent study of a mix of these types of improvements on selected streets in New York City shows that retail sales on most of those improved streets increased on average more than the average sales in the entire borough and more than sales on many other streets in the neighborhood analyzed for a comparison.²¹ The specific results varied widely from a few percentage points above the borough and/or comparison streets to as much as 30-40%.

Summary of Likely Changes in the Study Area

The analysis presented above leads to a conclusion that in the short-term, the economic impacts of the conversion of Front Street and Main Street from one-way to two-way traffic can be expected to be rather modest. The key influencing factors are:

- (1) Relatively small number of businesses deemed sensitive to traffic flow and dependent on spontaneous customer visits and discretionary expenditure from pass-by traffic. Therefore, most businesses are unlikely to see a significant increase in revenue.
- (2) Higgins Avenue is one of the key shopping streets in the downtown core and at the same time one of the key arterials through downtown with much larger traffic than Front Street and Main Street. Simulations with traffic model indicate that conversion of Front and Main is not expected to affect traffic flow on Higgins. Therefore, Higgins may be expected to remain one of the key downtown shopping streets, possibly competing with Front and Main.
- (3) Cautious economic forecasts and some uncertainty regarding the effects of the announced cuts in the public sector in Missoula. This may limit growth in consumer expenditures which in turn will not be favorable to the general business conditions in which the various businesses operate.

Overall, a short-term increase in sales of about 10% to 13% for local retail, restaurants and other food establishments could be a reasonable estimate based on the following two considerations.

Increased daily vehicle traffic can be expected to increase sales by about 10%. This is based on experience in Vancouver, Washington (lower range of the reported increase in retail sales, see Table 6) and assessment conducted for Kelowna, British Columbia (an impact of 10% corresponding to upper level assessed impact on streets with no change in traffic and lower range of assessed impact on street with a significant reduction in traffic).

Improved environment for pedestrians and bicyclists can be expected to increase sales by another 3%. This is based on experience in New York City where similar street improvements were reported to generate some increase in retail sales in many instances with a lower range around a few percentage points.

²¹ "The Economic Benefits of Sustainable Streets", New York City Department of Transportation, date unknown. Report accessed at <<http://www.nyc.gov/html/dot/downloads/pdf/dot-economic-benefits-of-sustainable-streets.pdf>>.

It should be pointed out that since there is no local sales tax in Missoula, the city is unlikely to see a fiscal benefit of the proposed street conversion in the short-term.

In the longer-run, the impact of the street conversion project may be more significant. This could be possible given that some redevelopment projects in areas adjacent to the study area are now starting taking place (Fox Site, Old Sawmill, Silver Park). When completed, these projects may provide new trips and visits to the area which are necessary to stimulate growth. Initial improved conditions and growing sales may then provide an incentive to lease vacant spaces, or change profile of some existing businesses so as to generate higher revenues.

The success of the initial projects may then provide an incentive to pursue other projects downtown, perhaps even redevelopment of other existing street sections (for example to multi-use structures with retail on the ground floor and office or residential on the upper floors).

Review of Existing Conditions for Pedestrians, Bicyclists and Transit Riders

Introduction

This review provides a summary of the existing conditions for pedestrians, bicyclists and transit riders in the study area. While an adequate network of sidewalks exists throughout, pedestrian access to the study area, and to a lesser extent pedestrian circulation, has challenges. These include long crossing distances and a lack of adequate crosswalks or signals. There are few bicycle amenities within the study area. Bicycle facilities are present just outside the study area boundary, but access from adjacent bike lanes and trails can be challenging. Madison Street on the east side of the study area is a major obstacle for east-west pedestrian and bicycle traffic. There are a number of bus routes operating within the study area or just outside of it, serving a range of destinations. In addition, the transfer center is located only a few blocks from the study area. Service, however, can be fairly infrequent, especially during off-peak hours, and there is no service on Sundays.

The following pages explore the existing conditions in further detail.

Pedestrian Access to the Study Area

The five-legged Orange Street/Front Street/Main Street intersection functions as the western gateway into the study area. Front Street west of Orange Street ties into the Riverfront Triangle, slated for redevelopment with high-density residential and employment uses. While the intersection is signalized, it is perceived as uninviting and risky to cross, due to the traffic volumes and speeds on Orange Street, the lack of pedestrian refuges, permitted right turns on red, and long crossing distances across five lanes of traffic – about 85 feet, which equals about 21 seconds of walk time¹. Furthermore, the curb-adjacent sidewalks lack any amenities that generally provide pedestrian comfort, such as boulevards that buffer pedestrians from moving vehicles, or street trees that provide shade and shelter.

Higgins Avenue bisects the study area and provides access from the north and south. All intersections with Higgins Avenue – Front Street, Main Street, and Broadway Street – are signalized, ensuring generally good east-west connectivity, although the street width of about 70 feet causes a relatively long 18 seconds of walk time.

Two intersections at Madison Street constitute the eastern gateways into the study area. A crosswalk on the north side of Front Street provides a notional east-west pedestrian connection across Madison Street. However, the absence of a signal in combination



Main Street at Orange Street looking east



Pedestrians crossing Front Street at Higgins Avenue

¹ Walk time is calculated at 4 feet per second (average walking speed), although walking speeds of children, seniors and people with disabilities can be significantly lower.

with high traffic volumes and speeds make the crossing of Madison Street a daunting undertaking. The crossing distance is substantial and includes not just the 5-lane arterial section of Madison Street with a 3-foot concrete median nose, but also the northbound frontage road along its western edge, separated by a raised landscaped median of about 15 feet in width. The overall crossing distance is around 120 feet, which equals around 30 seconds of walk time; the 5-lane arterial section of Madison Street is approximately 80 feet in width, which equals around 20 seconds of walk time.

The intersection of Main Street and Madison Street is closely tied to the intersection of Broadway Street and Madison Street, less than 100 feet to the north. The Broadway/Madison intersection is signalized and provides east/west and north/south pedestrian connections to and from the study area. However, the east end of Main Street is challenging for pedestrians due to cars entering from three directions without traffic controls – right turns from southbound Madison, left turns from northbound Madison, and left turns from the frontage road.

Broadway Street just to the north of the study area is a major east-west thoroughfare with four lanes of traffic bisecting the downtown area. West of Pattee Street the area is generally urban in character with ground floor commercial uses fronting on sidewalks. Signalized crosswalks at Orange Street, Ryman Street, Higgins Avenue and Pattee Street provide a fairly dense network of north-south connectivity. East of Pattee Street the character changes generally to a more auto-oriented development pattern with poor north-south pedestrian connectivity. While crosswalks are marked at Washington Street and Adams Street, there is a gap of more than 1,500 feet without signalized pedestrian crossings between Pattee Street and Madison Street.

Pedestrian Circulation throughout the Study Area

Clay Street and Washington Street subdivide the study area into two fairly distinct subareas. Generally, everything west of Washington Street is commercial in character, whereas the area east of Washington Street is predominantly residential, with the Missoula Public Library as linchpin connecting the two, and the Children's Theatre as a buffer to the busy Broadway Street. Accordingly, the sidewalk widths in the study area range in width: east of Washington Street, sidewalks generally are around 5 feet and typically separated from the roadway by landscaped boulevards, some quite substantial in width; west of Washington Street, sidewalks are generally curb-adjacent and range in width from around 10 to 12 feet along much of Front Street to about 15 feet and greater along much of Main Street.

Roadway widths and thus crossing distances for pedestrians also differ throughout the study area. Main Street is approximately 66 feet wide west of Washington Street, which equals about 17 seconds of walk time. Main Street east of Washington Street and Front Street west of Washington Street are around 50 feet in width, which equals about 13 seconds of walk



Typical sidewalk east of Washington Street



Typical sidewalk west of Washington Street

time. Front Street east of Washington Street is approximately 38 feet wide, or about 10 seconds of walk time, reflecting its purely residential character.

Other than the aforementioned signals at the Higgins Avenue intersections, none of the crosswalks within the study area are signalized. The crosswalks west of Washington Street are generally marked, while

crosswalks to the east are not. In addition to the crossings at intersections, there is one marked mid-block crosswalk near the west end of Front Street that includes retrofitted floating curb extensions to reduce the crossing distance and increase pedestrian visibility.

Crosswalks in the study area are generally perpendicular to the roadway, with two notable exceptions. Washington Street is misaligned at its intersection with Main Street, and the roadway width of Main Street changes at Washington, causing the crosswalks to be angled in order to connect the sidewalks. Similarly, the crosswalks at the intersection of Ryman Street and Front Street, which includes the busy driveway access to the Caras Park parking lot, are acutely angled. As a result, southbound pedestrians crossing Front Street cannot easily see oncoming eastbound traffic on Front Street. In addition, visibility at the driveway is impacted by large shrubs and is of some concern for pedestrian safety.

The quality of sidewalks in the study area is generally good, and for the most part, sidewalk widths are adequate for the adjacent land uses, particularly on Main Street west of Washington Street, where outdoor restaurant seating is common. There are a few narrow sidewalk widths along Front Street, often further compromised by A-frame signs partially blocking the sidewalk. Newer sidewalks in the study area, such as the one in front of the recently constructed Park Place structure on Front Street, are sufficiently wide and provide a layering of furnishing zone and walking zone that incorporates street trees and bicycle parking. There are a few condition issues on Front Street east of Washington Street, regarding both the paved section of the sidewalk as well as boulevard maintenance.

While there are stretches with mature trees providing shade and spatial definition, overall street tree coverage is inconsistent and spotty.



Crosswalks at Front & Ryman at an acute angle



Mid-block crosswalk with floating curb extensions



Good sidewalk on Main Street with restaurant seating and consistent street tree coverage



Substandard sidewalk further compromised by overly large and incorrectly placed signs

Other than some of the above mentioned crosswalk issues, the major safety concern for pedestrians is the frequency of driveway curb cuts, particularly west of Ryman Street, but also around the Main Street/Pattee Street intersection, and along the Main Street frontage of the Missoula Children's Theater. There are several instances of adjacent driveways within close proximity, and others of substantial width. In addition, a few parking lots directly abut the sidewalk without any landscape buffer. While there are several driveway cuts along the south side of Front Street east of Washington Street, these tend to be low volume residential driveways with a lesser conflict potential.



Sidewalk and boulevard condition issues on Front Street

Bicycle Access to the Study Area

Striped bike lanes on three major north-south routes in the downtown area provide access to the study area: Orange Street, Higgins Avenue, and Madison Street. The bicycle lanes are basic 5-foot striped lanes without any protective buffers. There are no provisions to facilitate left turn movements from southbound Orange Street or northbound Madison Street into the study area, so bicyclists either have to merge into travel lanes or utilize pedestrian crossings to enter the study area.



Main Street at Higgins Avenue

The Madison Street under-bridge allows for easy bicycle access to the downtown area from the University of Montana campus and the larger bicycle network south of the Clark Fork River via the Riverfront Trail North that runs along the river just south of the study area. The trail enables bicycle access to the study area at numerous points, including Ryman Street, Pattee Street, Clay Street, Parsons Drive, and Kiwanis Park. However, all of these access points are rather incidental and none provide a direct route or a clear gateway.

Striped bike lanes on Broadway Street west of Orange Street provide bicycle access from the west and tie into the larger trail system via the Shady Grove Trail and the California Street bridge, which provides a connection to the Riverfront Trail South. The Greater Downtown Master Plan proposes a protected bi-directional bikeway along the south side of Broadway Street east of Orange Street, which would significantly improve east-west connectivity and access to the study area from the north.

Bicycle Circulation throughout the Study Area

There are no dedicated bicycle facilities in the study area besides the striped bike lanes on Orange Street, Higgins Avenue and Madison Street. Bicyclists ride in the travel lanes, and there are painted “sharrow” markings along Main Street indicating the shared nature of the facility. Almost all destinations within the study area are within a couple of blocks of a north/south bike facility on an arterial street, or within a couple of blocks of the Riverfront Trail North. However, the actual riding distance may be greater due to the one-way street system. Anecdotal observations and stakeholder feedback also suggest that bicyclists utilize sidewalks to ride against the flow of traffic, particularly on Front Street.

Bicycle parking in the study area is limited to several inverted U type racks located on sidewalks west of Washington Street. In addition, there are two larger bike parking areas associated with the Missoula Public Library and the Missoula Children’s Theatre.



“Sharrows” on Main Street indicate shared travel lanes



Typical sidewalk bicycle parking in the study area utilizing a simple inverted U type rack



Bicycle parking in front of the Missoula Public Library

Transit Service in the Study Area

Mountain Line provides public transit service in the greater Missoula area. The study area is served by a number of fix-route bus lines. Three bus routes operate on portions of the Front Street/Main Street couplet (Routes 1, 7 and 12), another route bisects the study area on Higgins Avenue (Route 6). All four routes terminate at the transfer center a couple of blocks north of the study area on Pine Street, between Woody and Ryman, and provide connections to destinations south of the Clark Fork River, including the University of Montana, the fairgrounds, and Southgate Mall.

An additional five routes operate on portions of Broadway along the northern study area boundary and provide connections to destinations to the north, west and east, including the Missoula International Airport (Route 11).

While the area is well served by a variety of bus routes providing connections to much of the city, service frequency is limited during off-peak hours and on Saturdays. There is no bus service on Sundays and major holidays. Route 1 provides the most frequent service within the study area with peak headways of 15 minutes, whereas Routes 7 and 12 have peak headways of 30 minutes. In between peaks service frequency typically drops to 60 minute headways.

There are ten bus stop locations within the study area, and another five just beyond the boundary on Broadway Street and Higgins Avenue. Most of the bus stops in and around the study area consist of simple signs. Only a few bus stops have benches, and there are no shelters, ticket vending machines, light fixtures, trash receptacles, route maps, or any other amenities often found at transit stops.

General fare for a one-way ticket is currently \$1.00, with discounts for youth and seniors. However, Mountain Line will begin a three year “zero fare” demonstration project on January 5, 2015, in an effort to increase ridership by 45 percent.



Mountain Line Route 1, shown at a bust stop on Main Street, connects the study area with the University of Montana campus and Southgate Mall.



Typical bus stop on Front Street with a bench.