Downtown Salem Customer Survey

Project Directed By:
Deniz Leuenberger, PhD
Jennifer Reid, MPA

Report Authored By:
Deniz Leuenberger, PhD

Institute for Regional Development
Bridgewater State College
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EXECUTIVE SUMMARY

The Bridgewater State College's Institute for Regional Development used a random telephone survey to assess citizen responses to use of Downtown Salem, with the goal of developing an increased understanding market opportunities of the region. The survey attempted to assess citizen perceptions of both primary and secondary market areas.

Responses from 360 respondents provided the following findings:

- Over 44% of respondents visited the downtown area within the past week, approximately 75% of residents have visited the downtown are within the past three months.
- When asked their reasons for visiting Downtown Salem, approximately 26% of respondents reported shopping and 35% of respondents reported dining as the reason.
- Over 55% of respondents come to the downtown area to purchase goods and services several times a week or several times a month.
- Approximately 66% of respondents found the selection of goods and services in the downtown region to be good or excellent.
- Over 82% of respondents found the selection of restaurants in the downtown area to be good or excellent.
- Over 57% of respondents found the store hours in the downtown area to be good or excellent, while approximately 23% found them to be poor or fair.
- Approximately 72% of respondents found the amount of parking in the downtown region to be fair or poor.
- Approximately 74% of respondents found the traffic in the downtown area to be fair or poor.
- More cultural events, more promotions and sales, parking and traffic improvements, pedestrian safety, variety of stores, increased handicapped access, and better lighting were reported more often as being likely to encourage shopping and visits to the downtown region.

- Approximately 39% of respondents reported that they shopped on Saturdays, when asked to select the day they “generally shop most often”. In contrast, approximately 4% of respondents selected Sunday.

- Dining was the only good or services primarily purchased in the Downtown Salem area by a majority (59%) of respondents. The Liberty Mall was the most popular shopping area for all other goods and services listed, although gifts and crafts were also listed as the primarily purchased in Downtown Salem by 35% of respondents.

- Approximately 72% of respondents agree or strongly agree with the statement that the area’s tourist attractions make spending time in the area more exciting, while approximately 23% disagree or strongly disagree.

- Approximately 88% of respondents agree or strongly agree with the statement that the area is better for the economy, while approximately 6% disagree.

In addition to the findings above, the researchers also completed a crosstabulation of key response variables against demographic variables. The research demonstrates that citizen responses based on age, income, and gender do not appear to result in differences in response variables. Citizen use of the downtown region and their recommendation for improvements appear to be consistent among demographic groups. The specific outcomes of the survey are provided in greater detail in this report.

PROJECT SUMMARY

Bridgewater State College’s Institute for Regional Development, subcontracted by Karl Seidman, designed and administered a citizen survey of residents in the greater Salem, Massachusetts region, during the months of February and March 2007. Citizens from Salem, Marblehead and Swampscott, and Peabody and Danvers completed the phone survey. A random sample of 3,500 households yielded a total of 360 respondents. The purpose of the survey is to obtain information and customer perceptions about Salem to assist in planning in the downtown area.

By means of a random sampling process, the survey gathered data from a diverse group of citizens in the greater area. A team of trained interviewers administered the survey during daytime and evening hours. All interviewing was conducted from the Institute for Regional Development's telephone research center at Bridgewater State College. A project director was present at all times to supervise the administration of the survey, monitor for quality control, and handle any other problems. Telephone numbers were selected at random and purged of non-working and business numbers. All telephone numbers in the sample were then called up to three times, using a rotating schedule of callbacks to ensure that a telephone number had been tried on different weekday evenings and days.

Upon completion of calls, the survey responses were entered into a computer database. Using the latest state-of-the-art statistical software (SPSS for Windows Version 13.0), the data file was analyzed. Complete protection and confidentiality of the survey database was assured during all phases of data analysis.

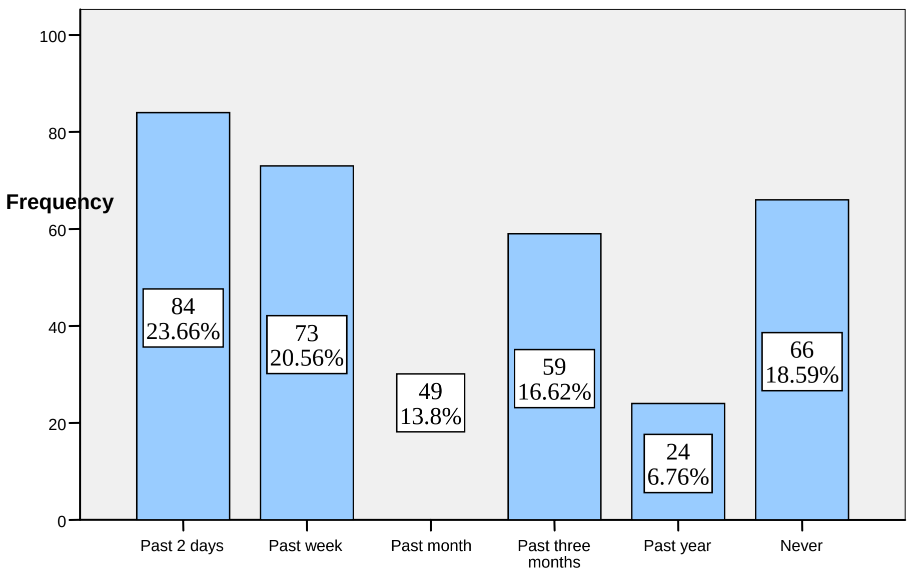
DATA RESULTS

The narrative below provides details of the survey data collection and analysis. In addition to the information below, crosstabulation was used to assess the relationship of the demographic variables such as income, age, and gender to the variables assessing citizen responses to the Downtown Salem region. No major differences in responses were detected among categories of the demographic variables to the survey questions.

Visitation of Downtown Salem Area

The first set of charts reports on the frequency of visits by respondents to the Downtown Salem area. It also provides information on factors impacting frequency of visits.

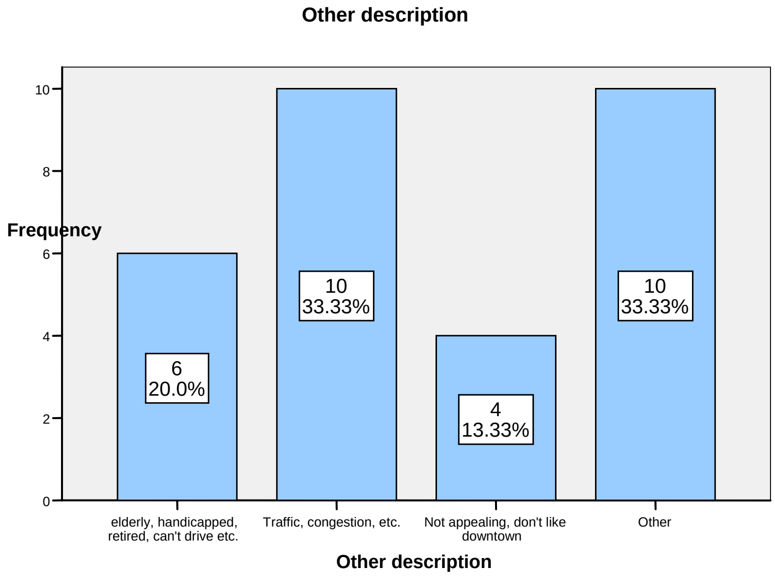
When was the last time you went to downtown Salem?



Highlights: Over 44% of respondents visited the downtown area within the past week, approximately 75% of residents have visited the downtown are within the past three months.

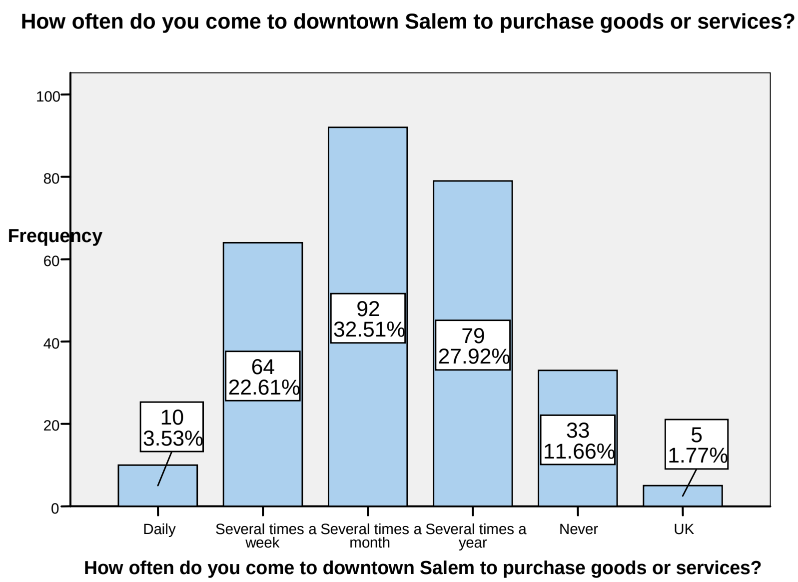
Why Never Visited Salem?	Frequency (N=360)	Percentage of Total Respondents
It is too far to travel	14	3.9%
Parking is not adequate	14	3.9%
It doesn't have the type of stores of services that I need	7	1.9%
Stores are too expensive	0	0%
It doesn't offer the type of restaurants or entertainment that I enjoy	1	.3%
Downtown area is unsafe	4	1.1%
Downtown area is unattractive	0	0%
Store business hours are not convenient	0	0%
Other	30	8.3%

Highlights: Of those respondents never having visited Downtown Salem, approximately 4% of respondents reported distance of travel and parking as concerns. 8.3% of these respondents provided "other" as the reason for never having visited the area. The following chart expands upon the category of "other" responses.

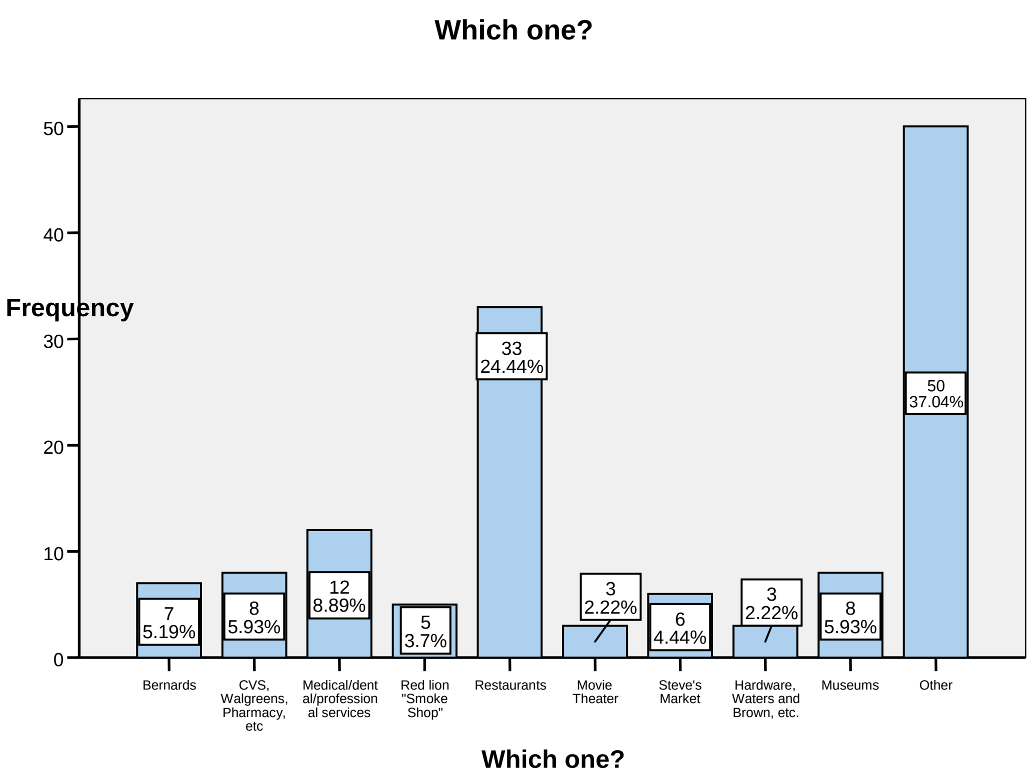


What are the Usual Reasons for Your Trip?	Frequency (N=360)	Percentage of Total Respondents
Live downtown	8	1.9%
Go to work	32	8.9%
Shopping	93	25.8%
Dining	126	35.0%
Banking	16	4.4%
Other business	21	5.8%
Tourist attractions	16	4.4%
Access health care	16	4.4%
Post office	6	1.7%
Education/classes	3	0.8%
Personal services	10	2.8%
Attend arts/ entertainment event	10	2.8%
Attend church services	1	0.3%
Attend school/ children’s activities	1	0.3%
Visit Peabody Essex Museum	32	8.9%
Visit city offices	14	3.9%

Highlights: When asked their reasons for visiting Downtown Salem, approximately 26% of respondents reported shopping and 35% of respondents reported dining as the reason.

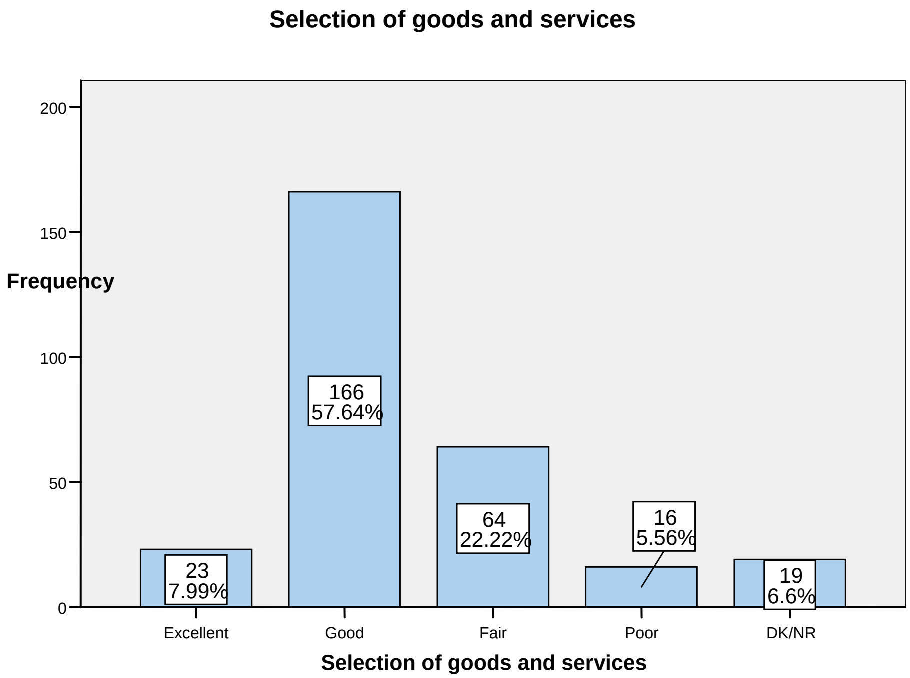


Highlights: Over 55% of respondents come to the downtown area to purchase goods and services several times a week or several times a month.

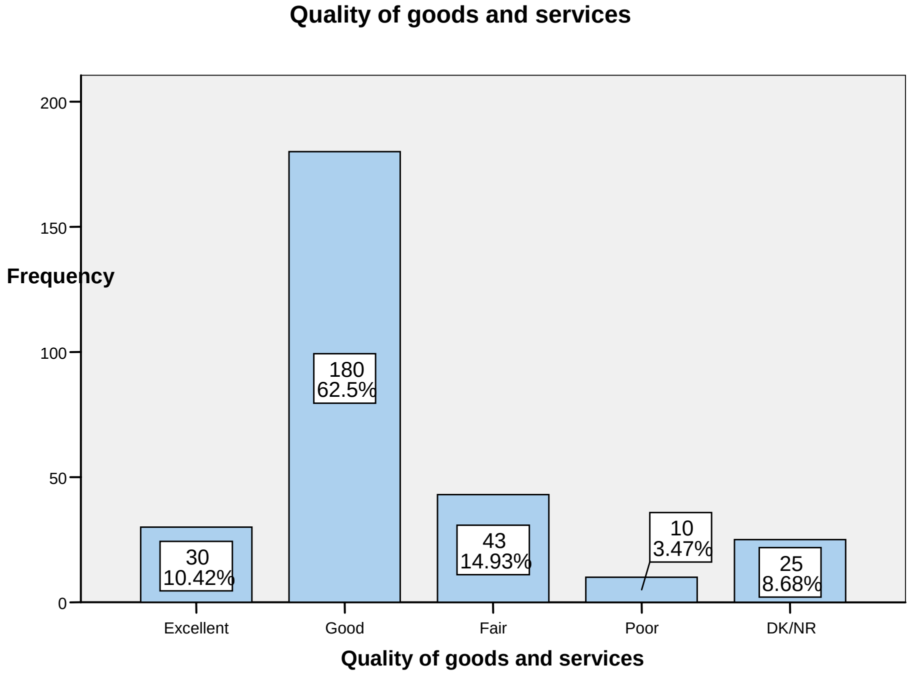


Downtown User Satisfaction

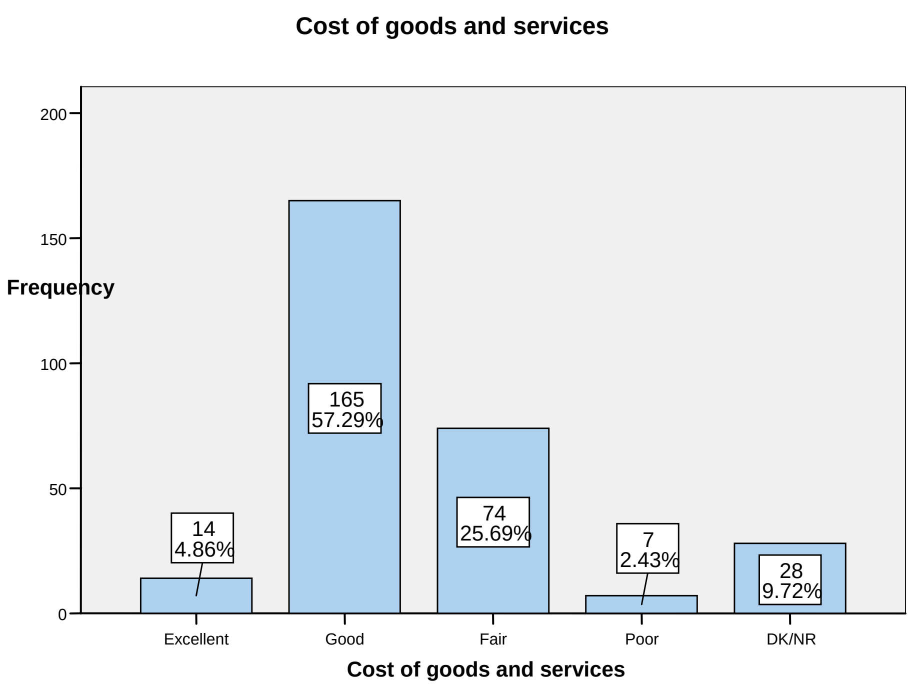
This section provides information on respondent satisfaction with a variety of factors impacting use of the downtown area. Respondents were asked to report whether they found a service to be poor, fair, good, or excellent.



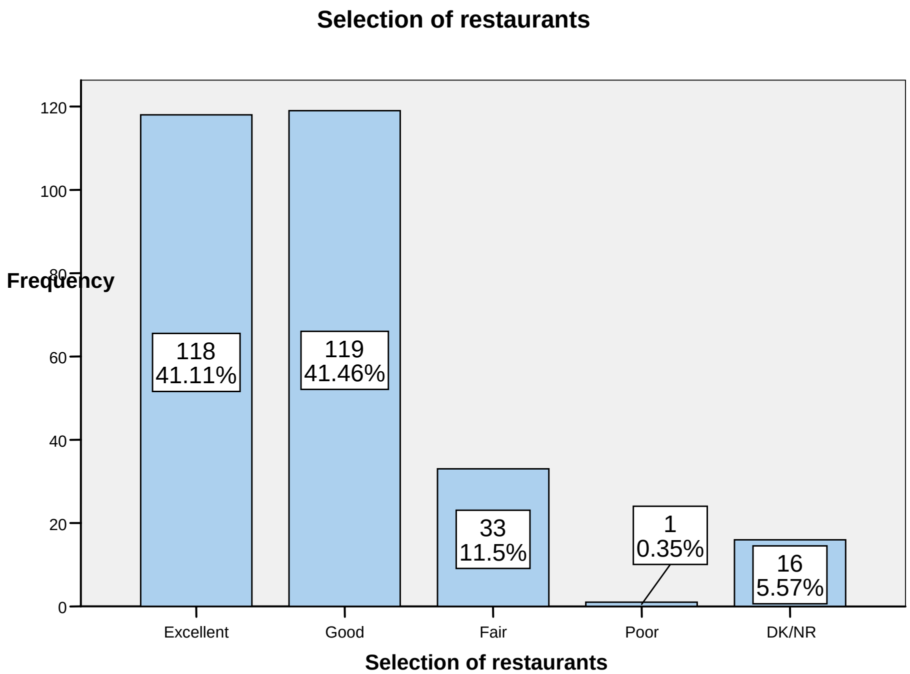
Highlights: Approximately 66% of respondents found the selection of goods and services in the downtown region to be good or excellent.



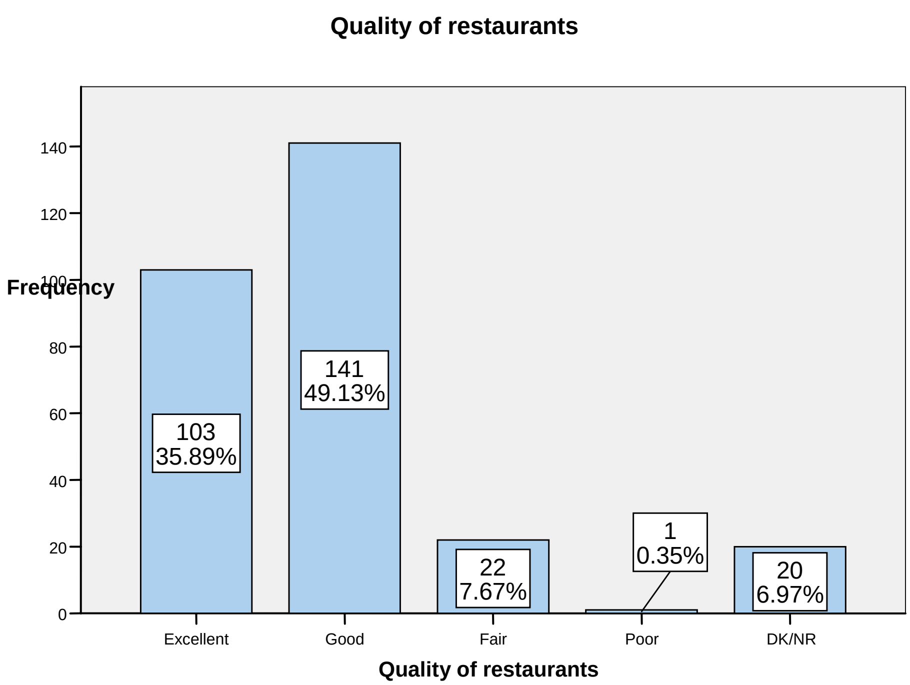
Highlights: Approximately 63% of respondents found the quality of goods and services to for good or excellent.



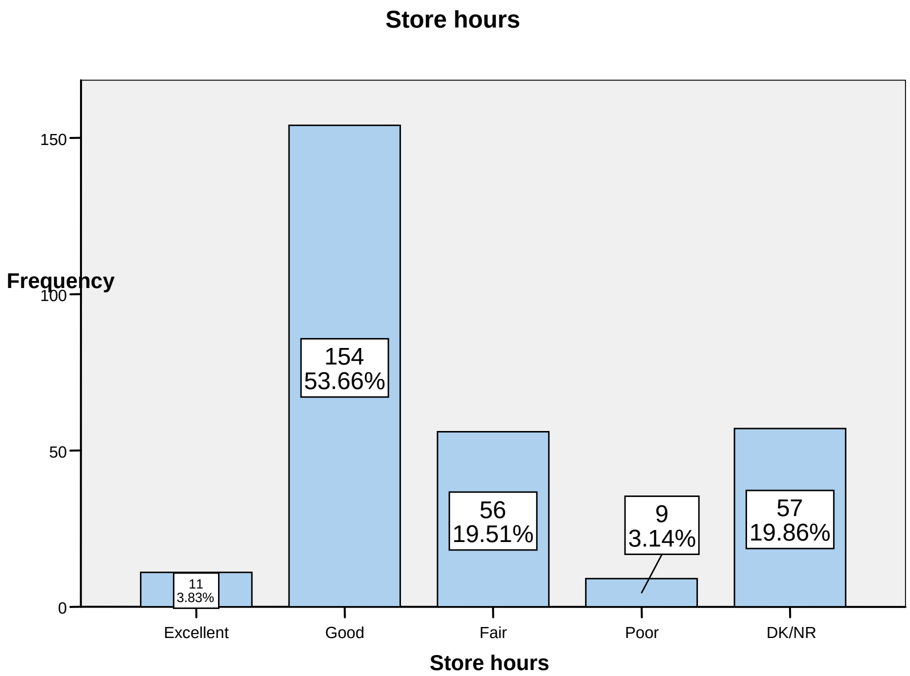
Highlights: Over 62% of respondents found the cost of goods and services to be good or excellent, while approximately 26% found them to be fair.



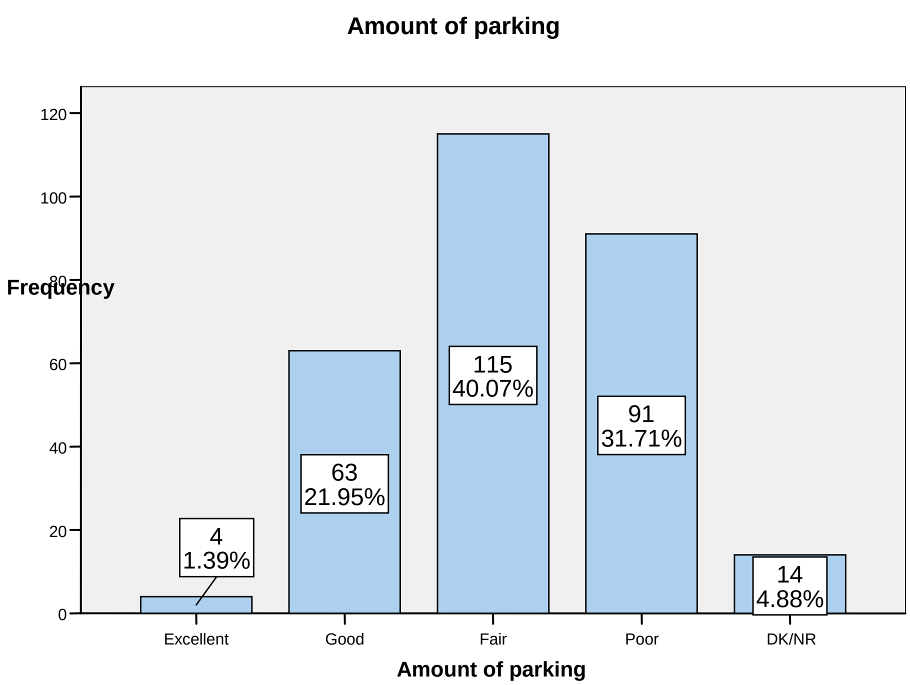
Highlights: Over 82% of respondents found the selection of restaurants in the downtown area to be good or excellent.



Highlights: Over 85% of respondents found the quality of restaurants in the downtown area to be good or excellent.

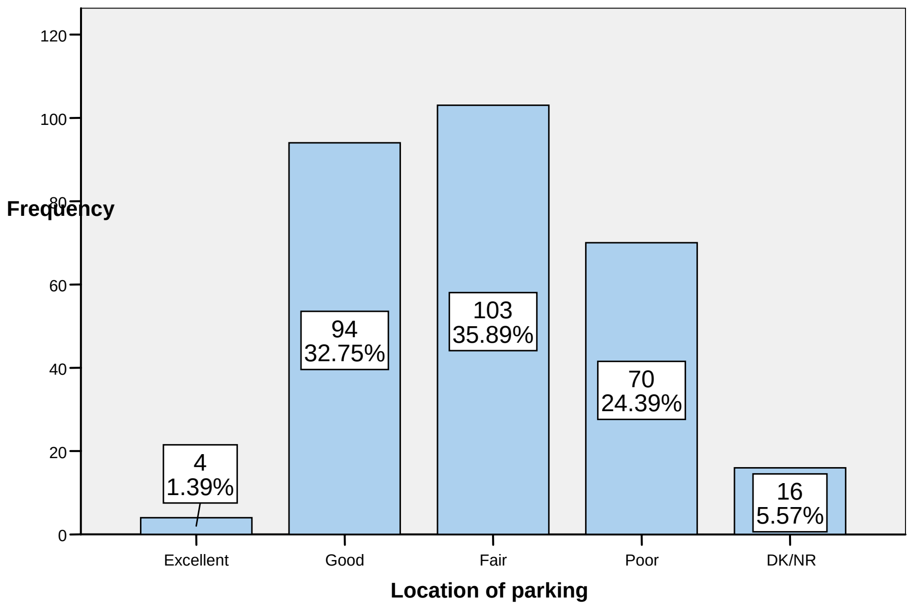


Highlights: Over 57% of respondents found the store hours in the downtown area to be good or excellent, while approximately 23% found them to be poor or fair.



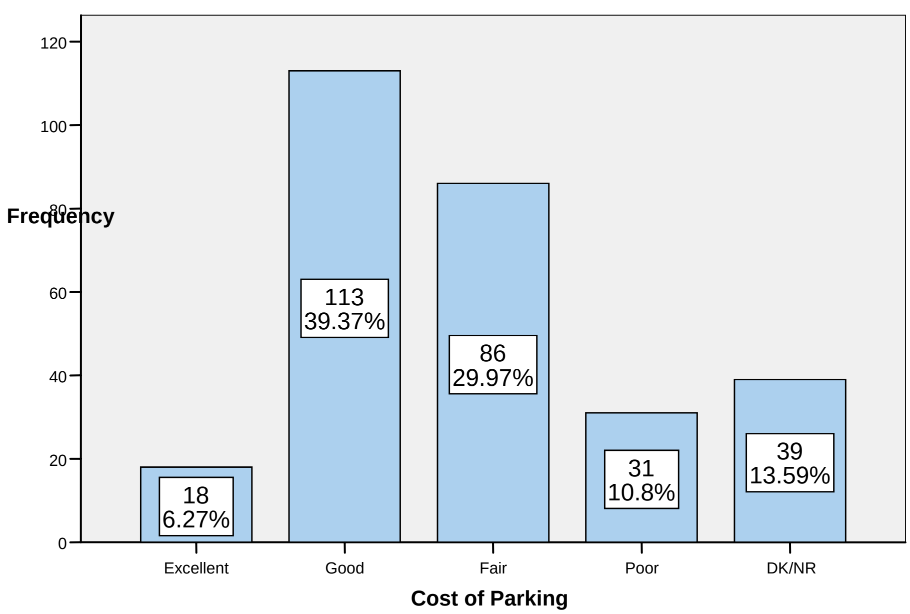
Highlights: Approximately 72% of respondents found the amount of parking in the downtown region to be fair or poor.

Location of parking

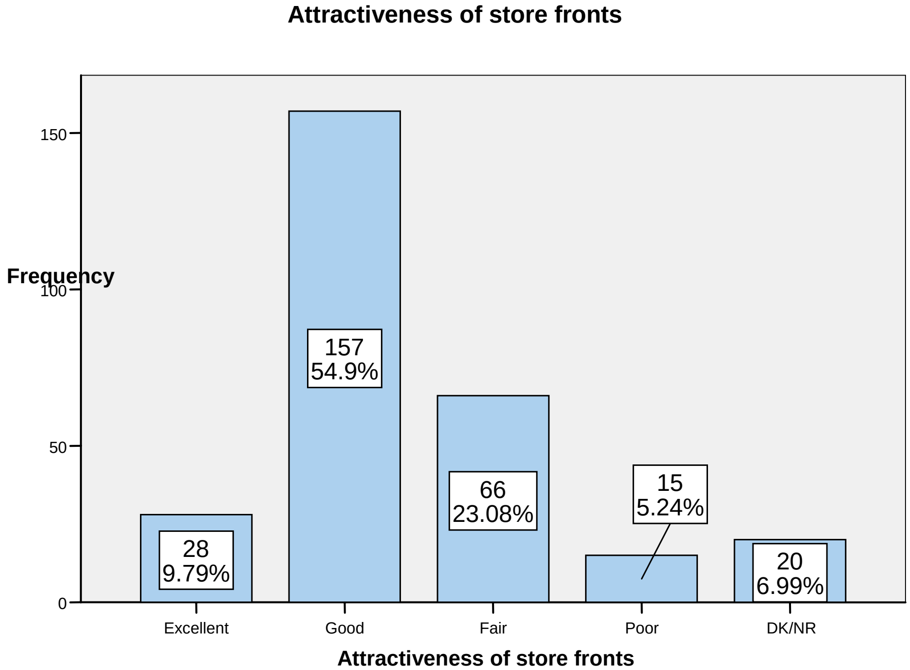


Highlights: Approximately 60% of respondents found the location of parking in the downtown area to be poor or fair, while approximately 33% found it to be good.

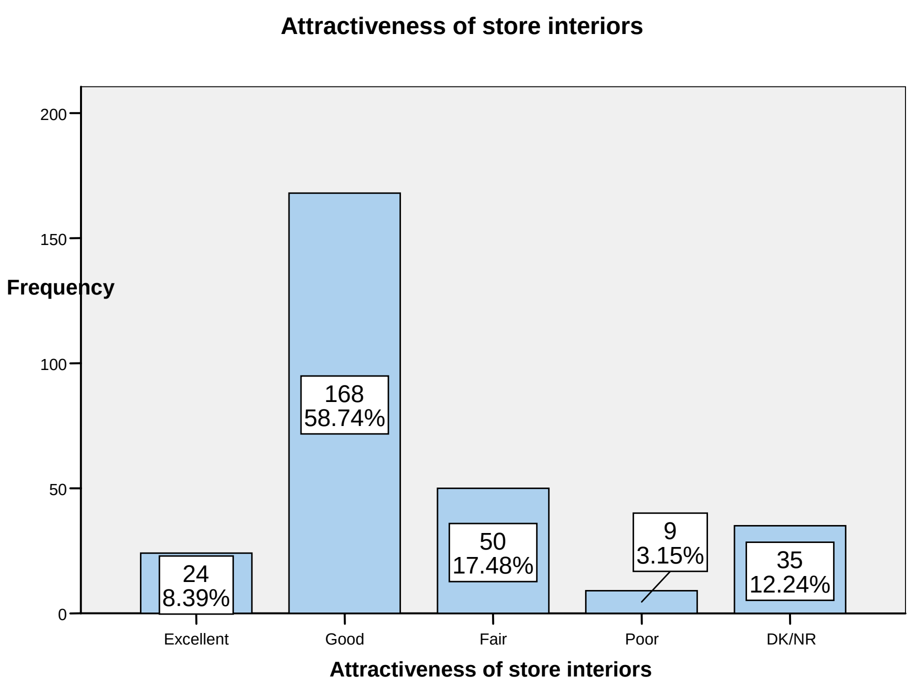
Cost of Parking



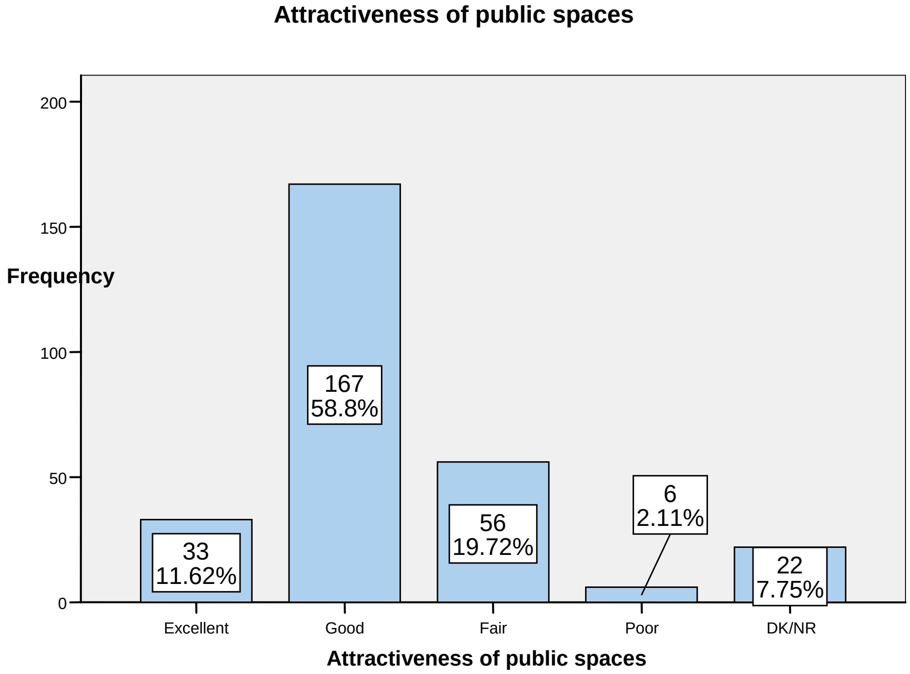
Highlights: Approximately 46% of respondents found the parking costs to be good or excellent, while approximately 31% found the cost of parking to be fair or poor.



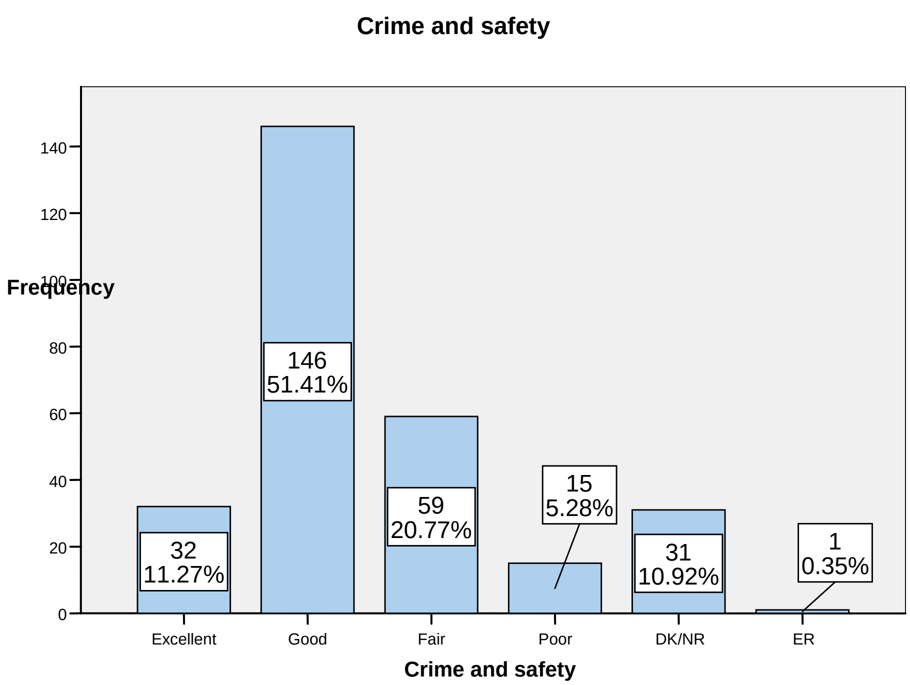
Highlights: Approximately 65% of respondents found the attractiveness of store fronts to be good or excellent.



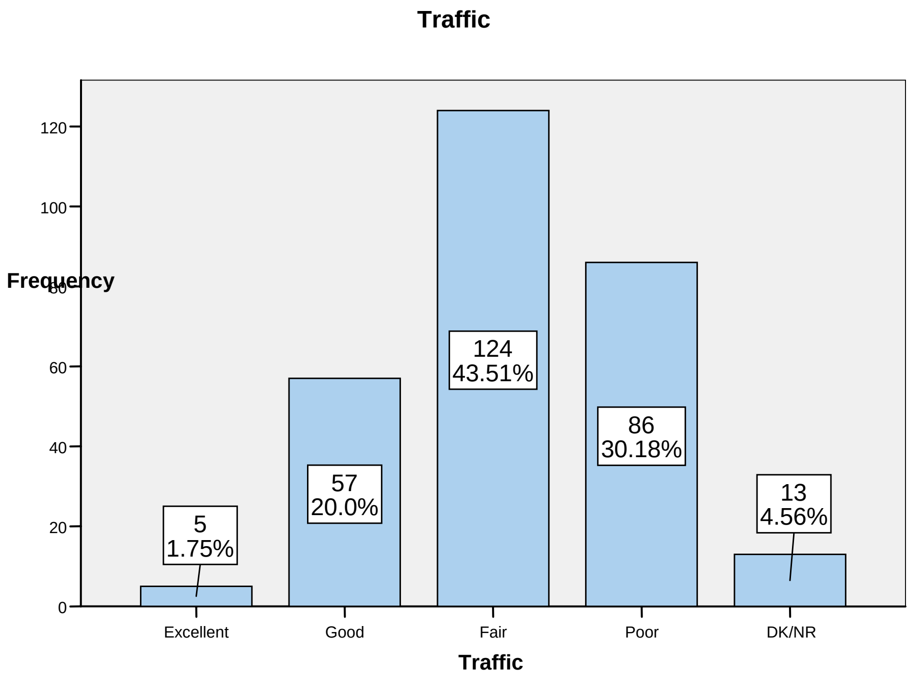
Highlights: Approximately 67% of respondents found the attractiveness of store fronts to be good or excellent.



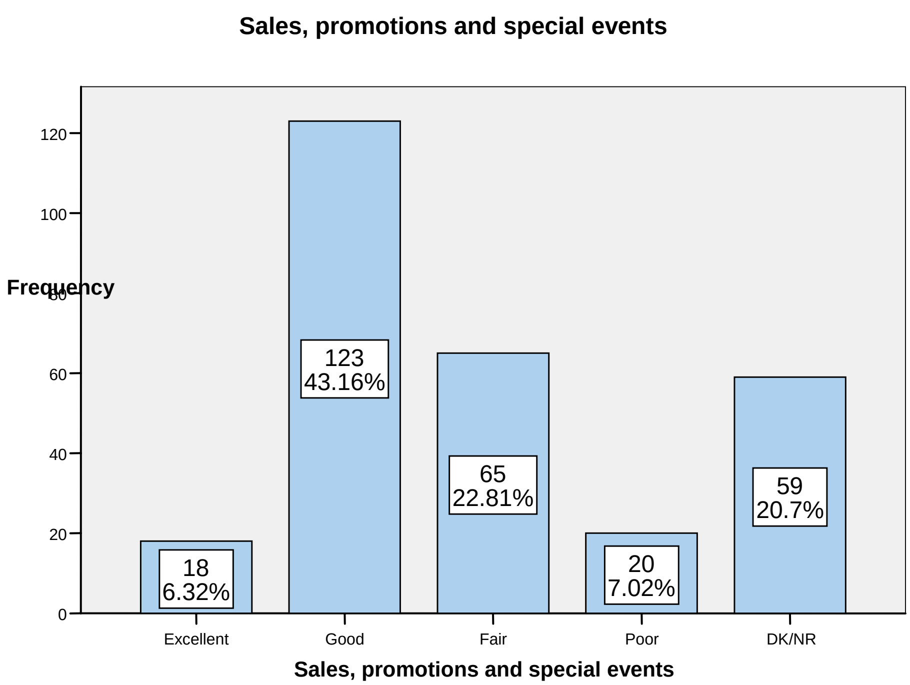
Highlights: Over 70% of respondents found the attractiveness of public spaces to be good or excellent.



Highlights: Approximately 63% of respondents rated crime and safety issues as good or excellent, while approximately 21% found them to be fair.



Highlights: Approximately 74% of respondents found the traffic in the downtown area to be fair or poor.

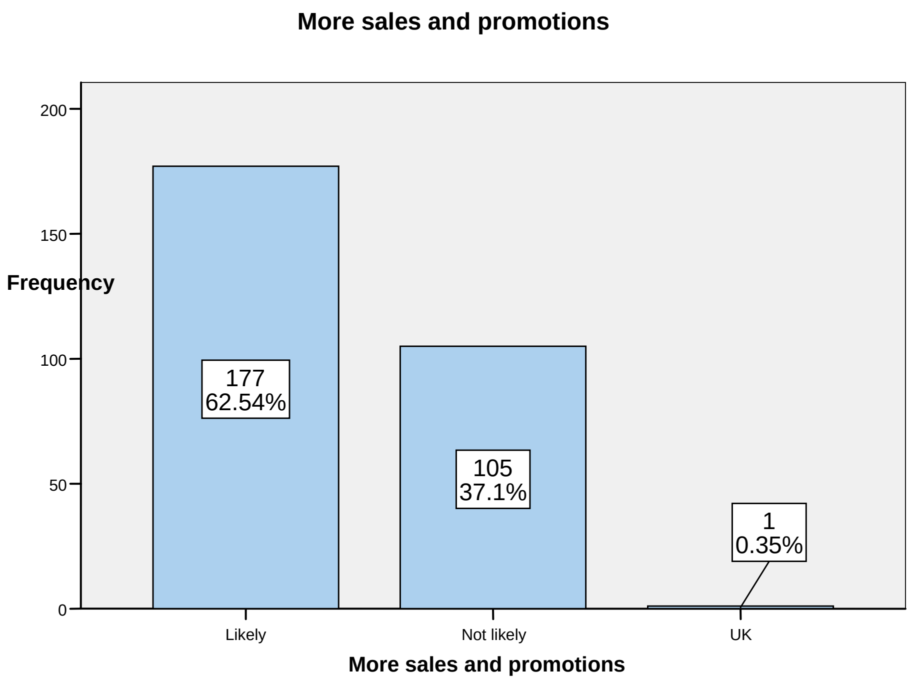


Highlights: Approximately 50% of respondents found the sales, promotion, and special events to be good or excellent, while 30% found them to be fair or poor.

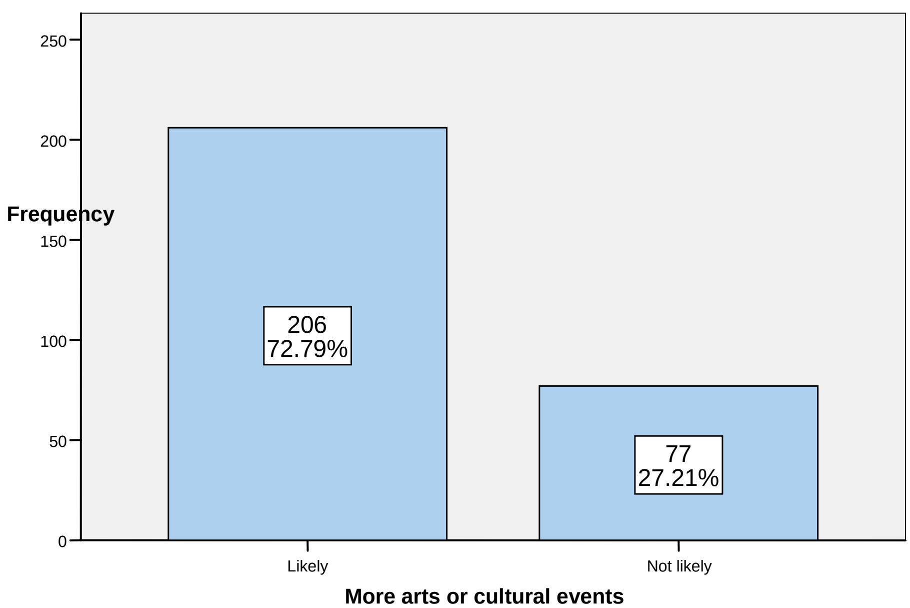
Impact of Improvements

The following section reports on whether respondents felt that the following improvements to Downtown Salem would encourage them to visit or shop in that area more often. Response choices were “likely” and “not likely”.

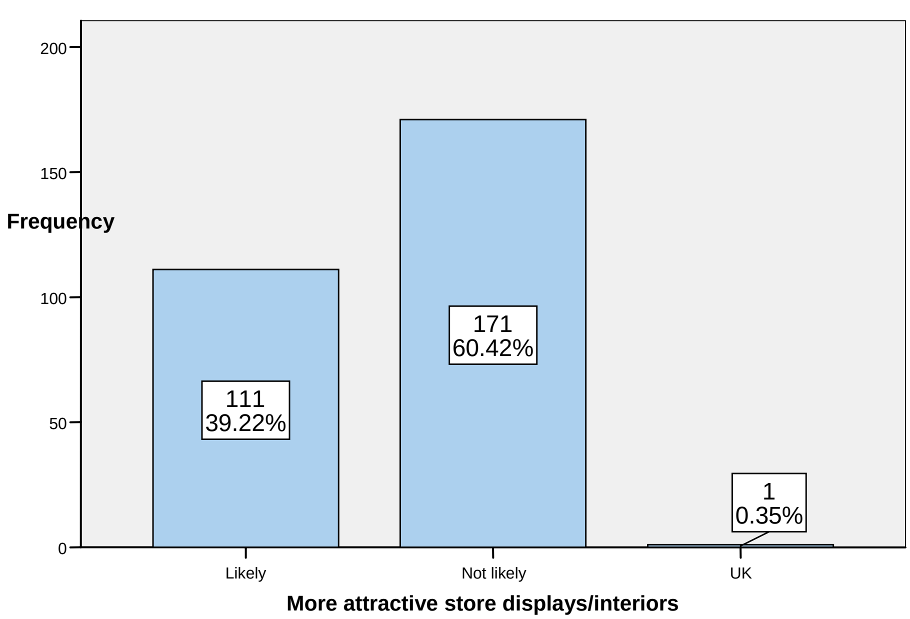
More cultural events, more promotions and sales, parking and traffic improvements, pedestrian safety, variety of stores, increased handicapped access, and better lighting were reported more often as being likely to encourage shopping and visits to the downtown region.



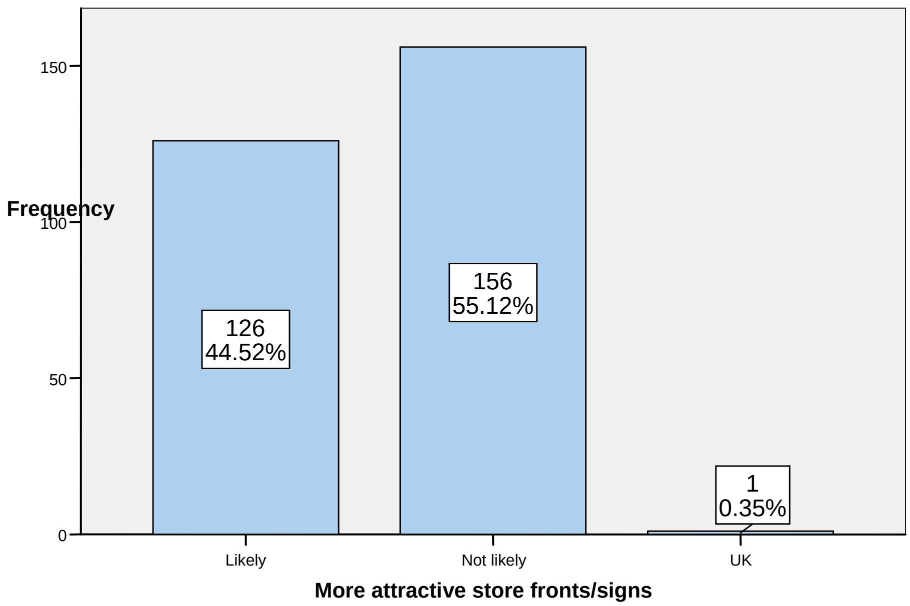
More arts or cultural events



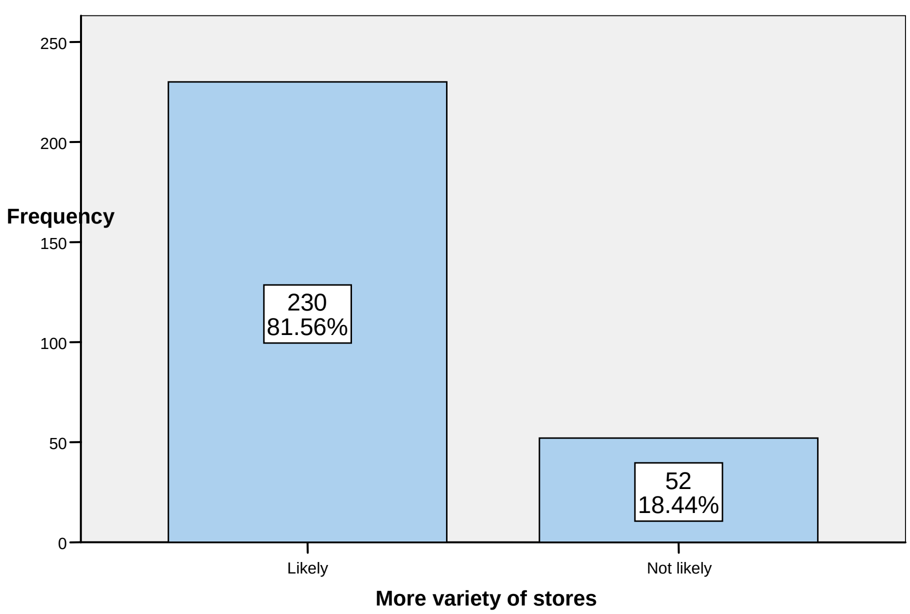
More attractive store displays/interiors



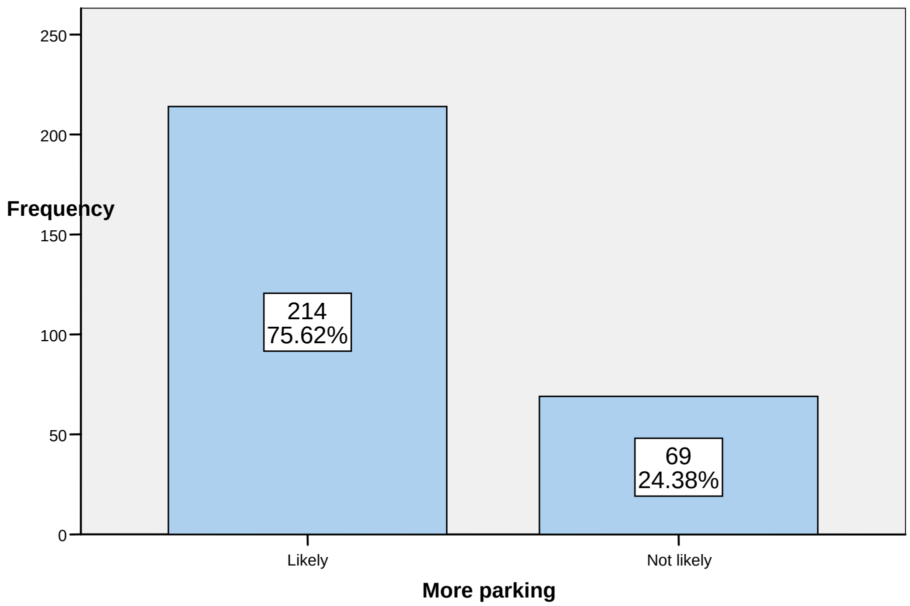
More attractive store fronts/signs



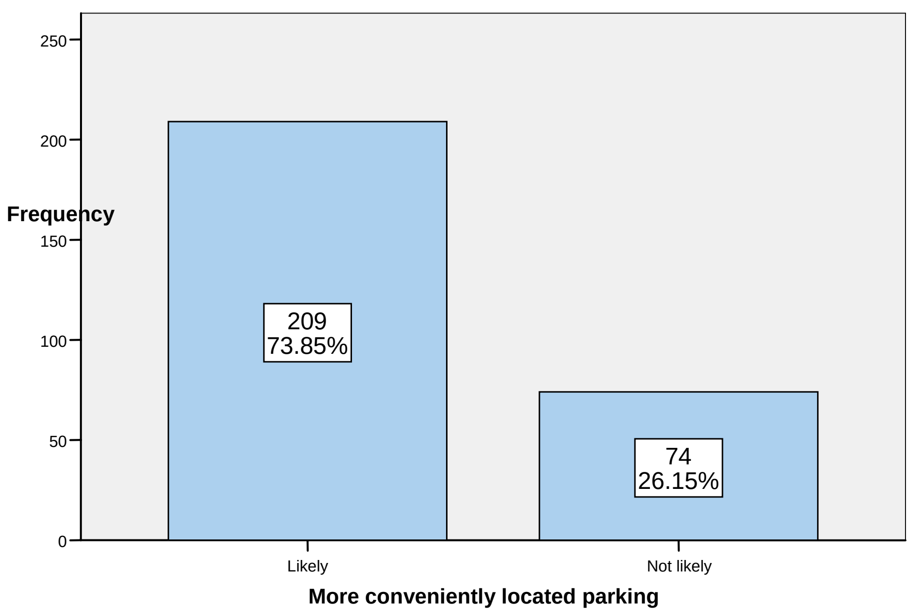
More variety of stores

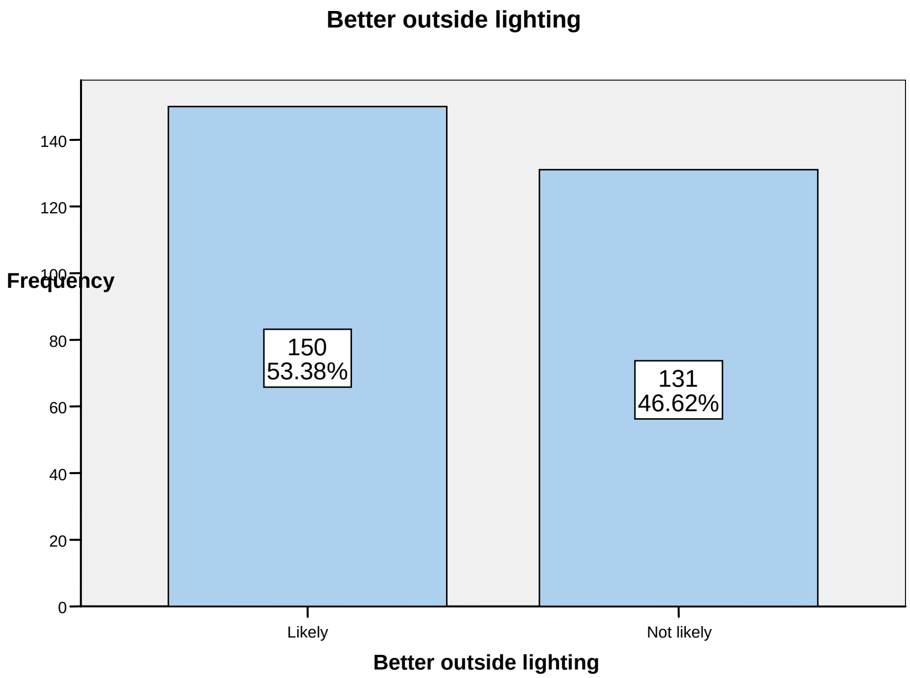


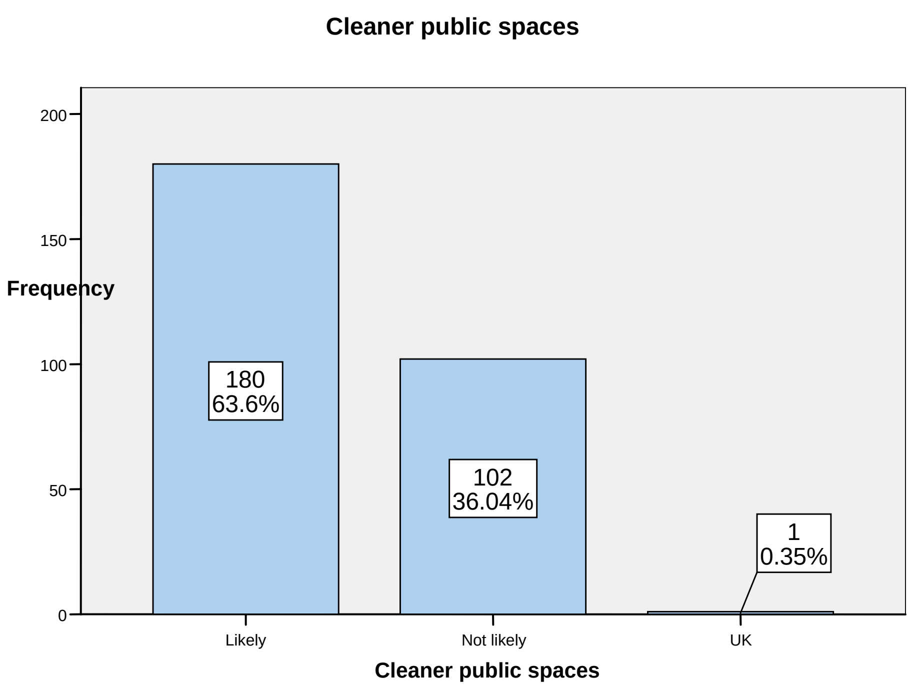
More parking



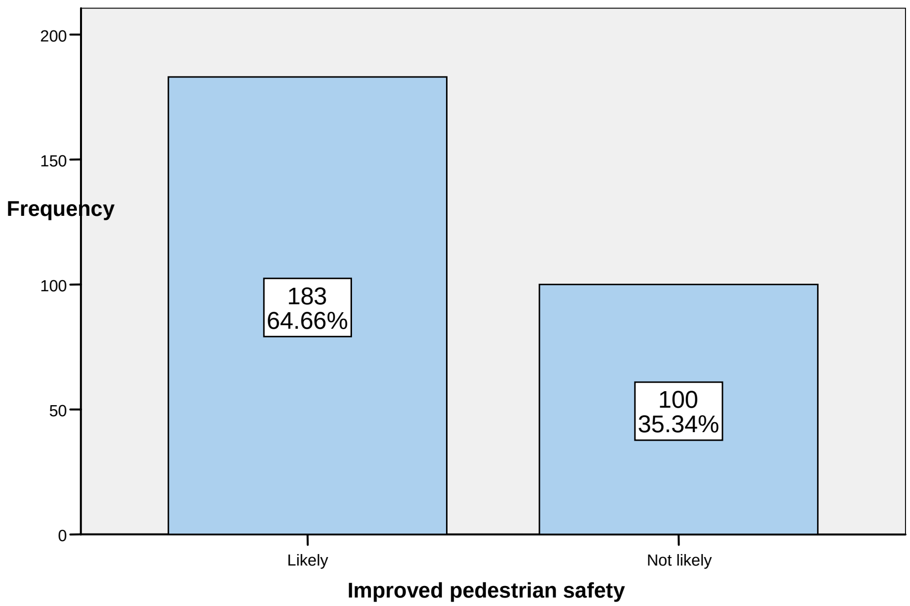
More conveniently located parking



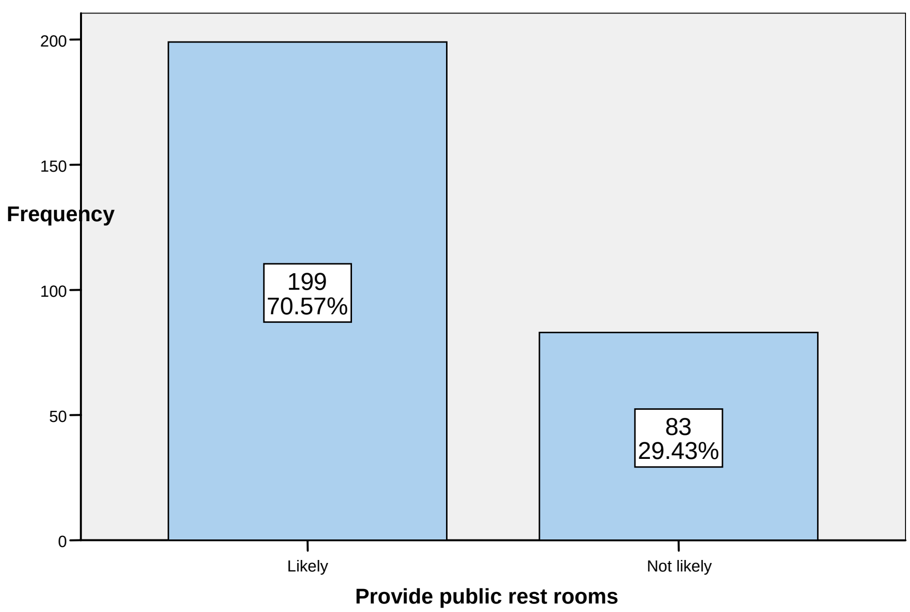

Better outside lighting
Frequency
0
20
40
60
80
100
120
140
150
53.38%
131
46.62%
Likely
Not likely
Better outside lighting

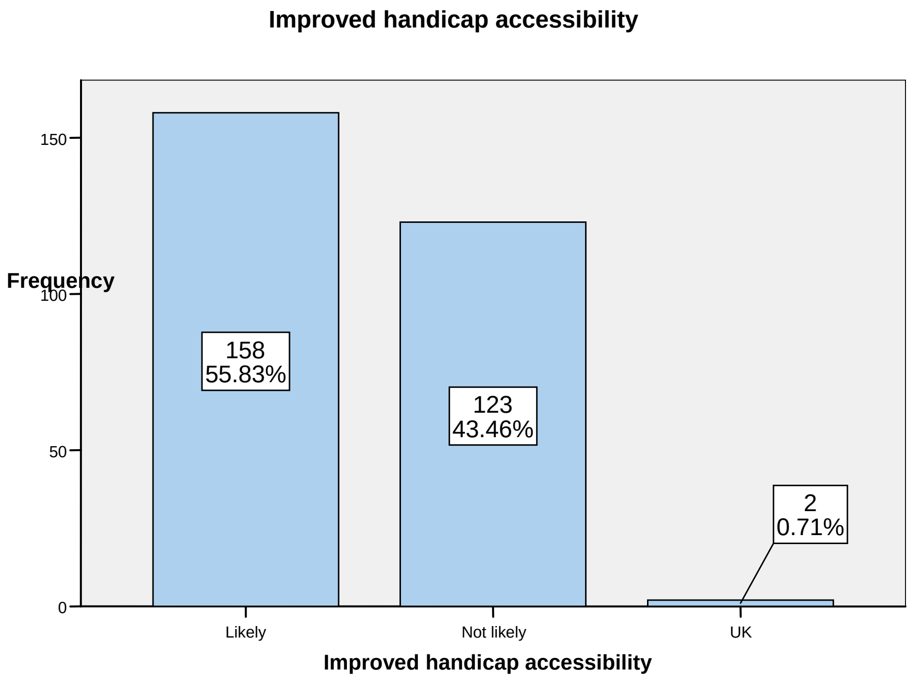

Cleaner public spaces
Frequency
0
50
100
150
200
180
63.6%
102
36.04%
1
0.35%
Likely
Not likely
UK
Cleaner public spaces

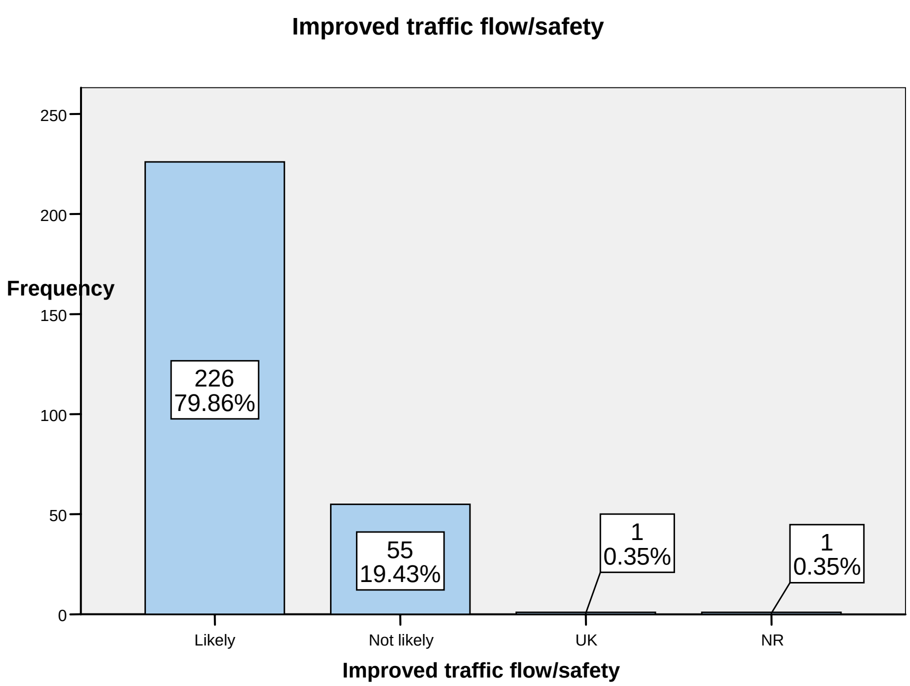
Improved pedestrian safety



Provide public rest rooms



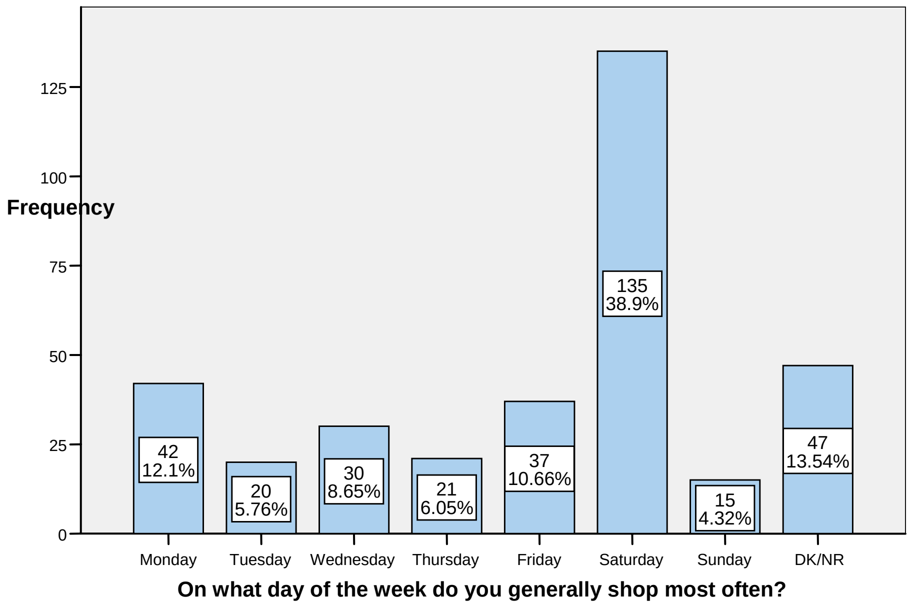

Improved handicap accessibility
Frequency
150
100
50
0
158
55.83%
123
43.46%
2
0.71%
Likely
Not likely
UK
Improved handicap accessibility


Improved traffic flow/safety
Frequency
250
200
150
100
50
0
226
79.86%
55
19.43%
1
0.35%
1
0.35%
Likely
Not likely
UK
NR
Improved traffic flow/safety

Shopping Times and Days

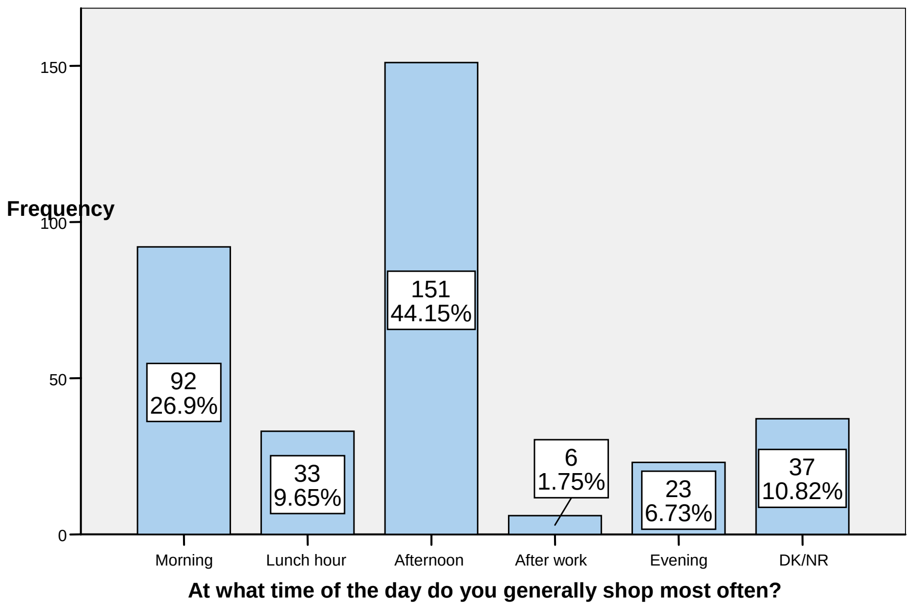
Respondents also provided information on preferences for days and times for which they preferred to shop in the downtown region.

On what day of the week do you generally shop most often?



Highlights: Approximately 39% of respondents reported that they shopped on Saturdays, when asked to select the day they "generally shop most often". In contrast, approximately 4% of respondents selected Sunday.

At what time of the day do you generally shop most often?



Highlights: The most common times reported by respondents for shopping were: afternoons at approximately 44% and mornings at approximately 27%.

What times would you prefer that Downtown Salem shops to be open? Yes/No?	**Frequency (N=360)** Response of Yes	**Percentage of Respondents**
More evening times (like 6 p.m. to 9 p.m.)	115	31.9%
More early morning times	71	19.7%
Afternoon/daytime	20	5.6%
Other	12	3.3%

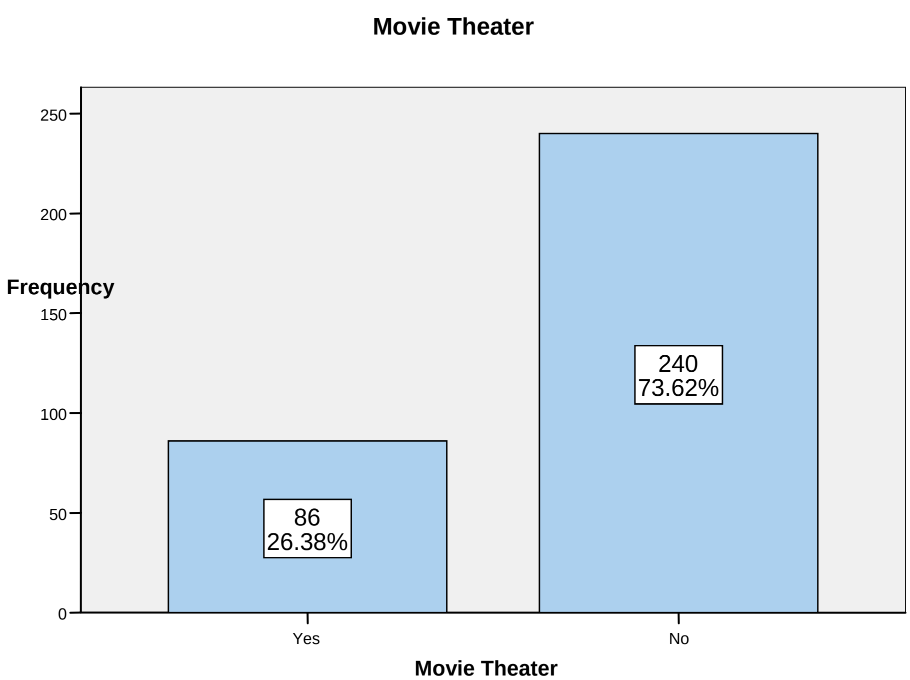
Highlights: Approximately 32% of respondents reported preferring open hours for shops in the evening.

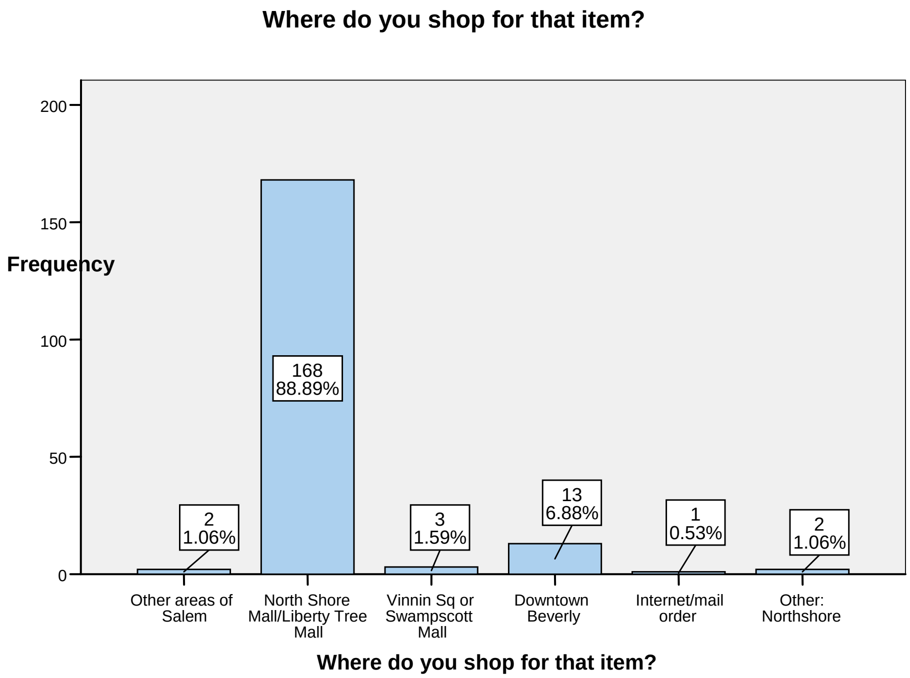
What days would you prefer that Downtown Salem shops to be open? Yes/No?	**Frequency (N=360)** Response of Yes	**Percentage of Respondents**
Monday	72	20.0%
Tuesday	71	19.7%
Wednesday	76	21.1%
Thursday	89	24.7%
Friday	99	27.5%
Saturday	115	31.9%
Sunday	94	26.1%

Highlights: Approximately 32% of respondents reported preferring open hours for shops on Saturdays.

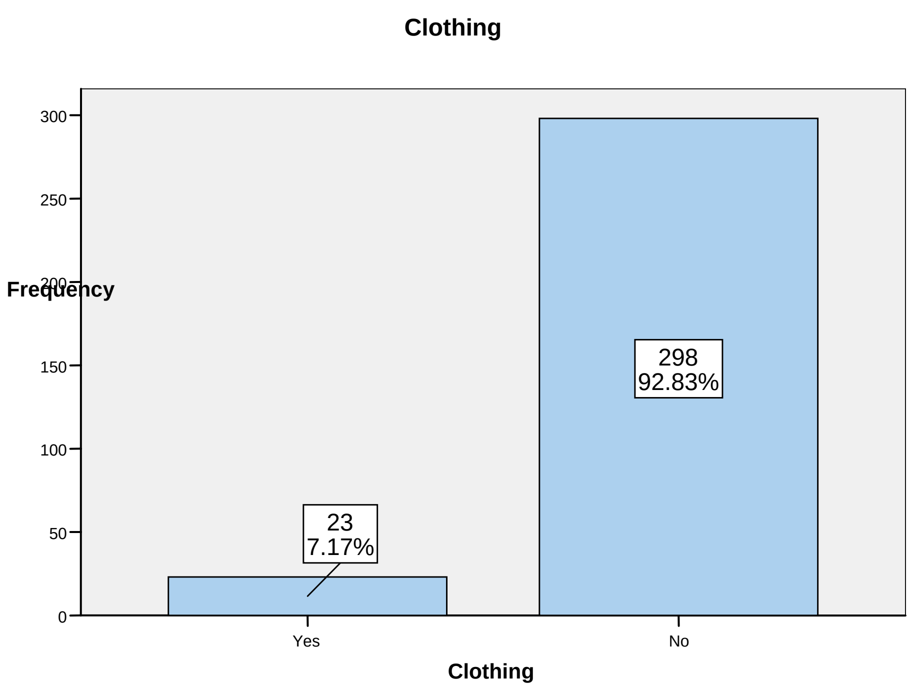
Use of Specific Goods and Services and Areas Purchased

The respondents also reported on their use of goods and services. They were asked whether they purchased a particular good or service in Downtown Salem. If they did not, then they also reported on where they shop for that good or service.

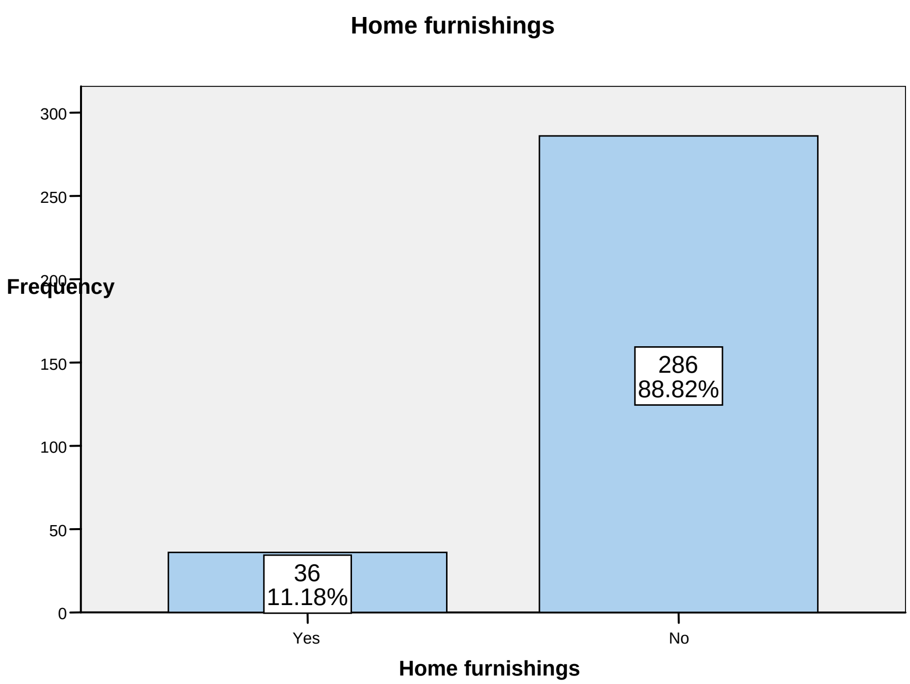


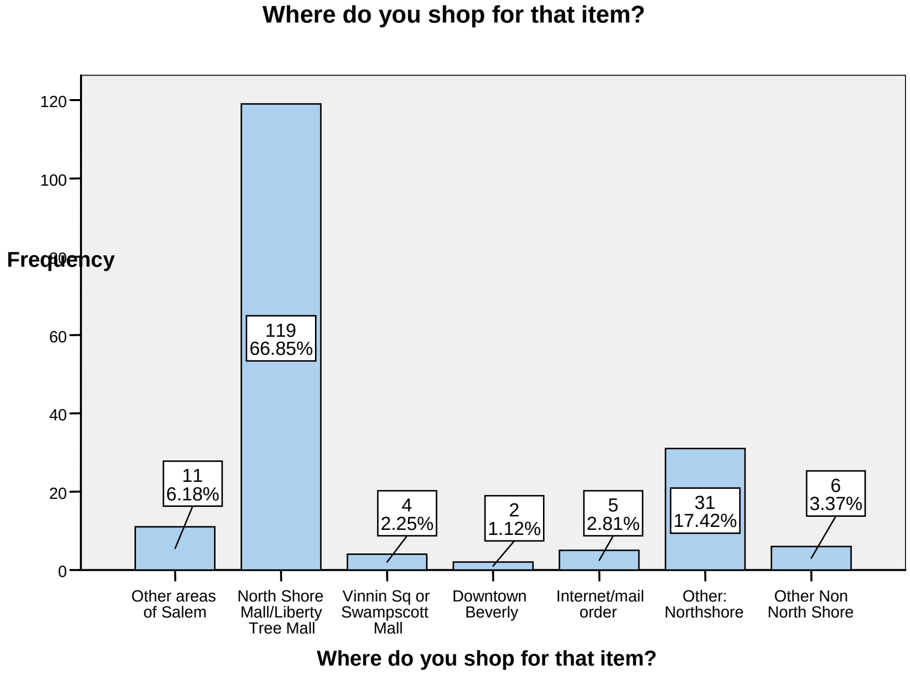


Highlights: Approximately 26% of respondents reported use of the movie theater primarily in Downtown Salem. Of those not using Downtown Salem for a movie theater, approximately 89% purchased this service in North Shore Mall/ Liberty Tree Mall.

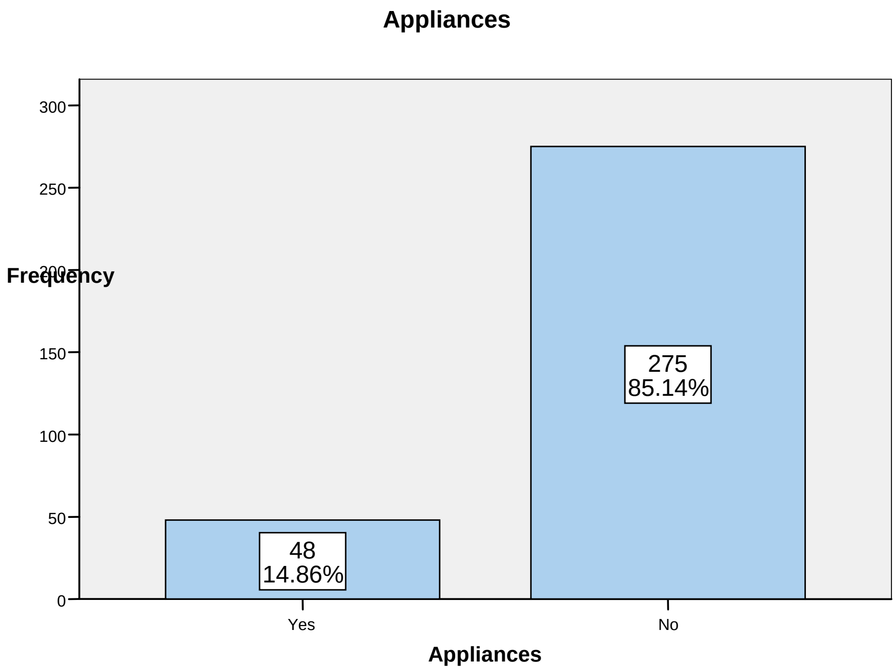


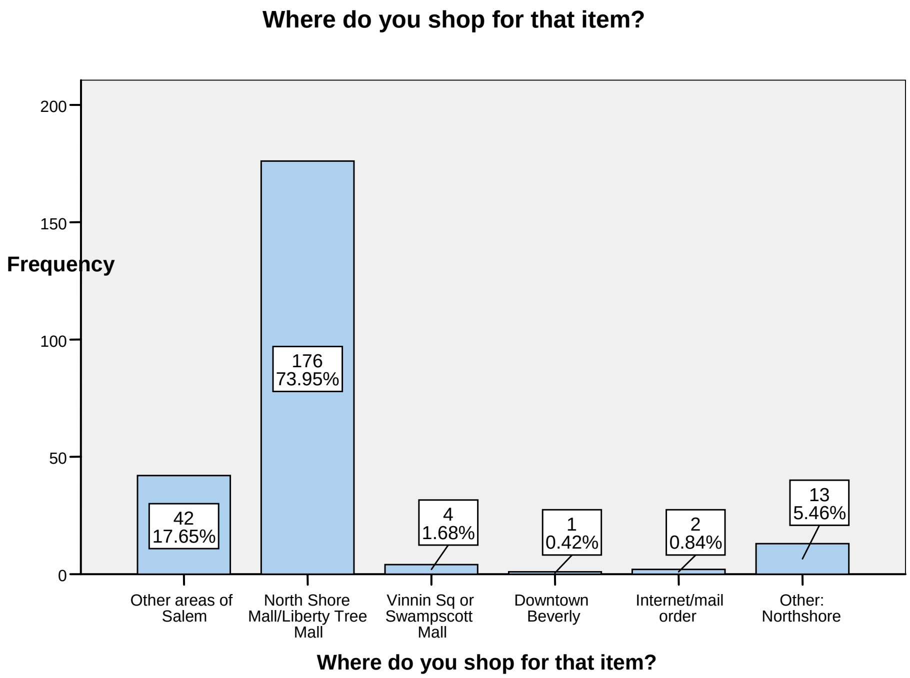
Highlights: Approximately 7% of respondents reported purchasing clothing primarily in Downtown Salem. Of those not using Downtown Salem for clothing purchases, approximately 84% purchased this good in North Shore Mall/Liberty Tree Mall.



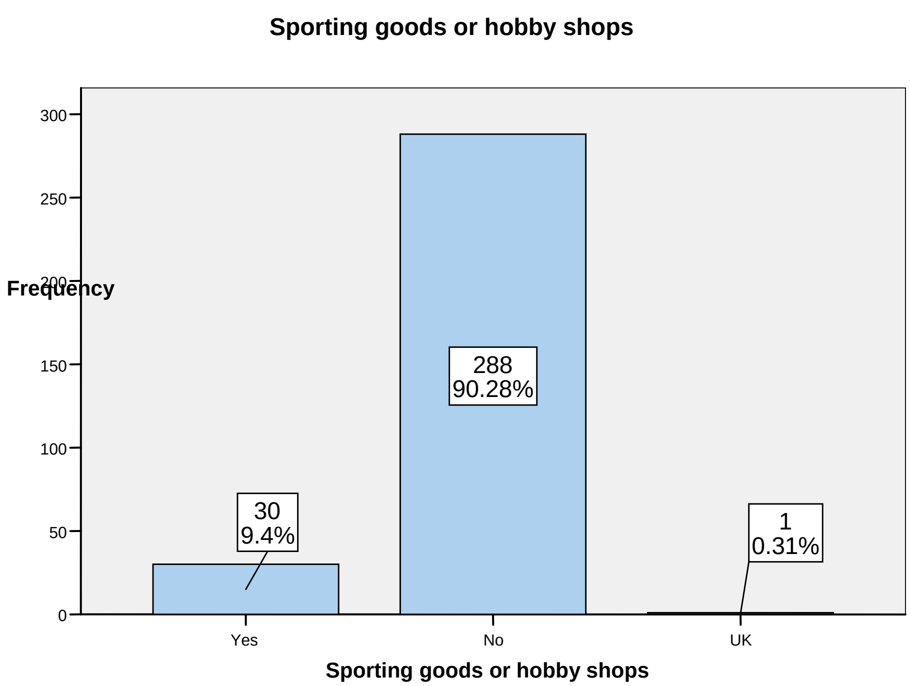


Highlights: Approximately 11% of respondents reported purchasing home furnishings primarily in Downtown Salem. Of those not using Downtown Salem for home furnishing purchases, approximately 67% purchased this good in North Shore Mall/Liberty Tree Mall.

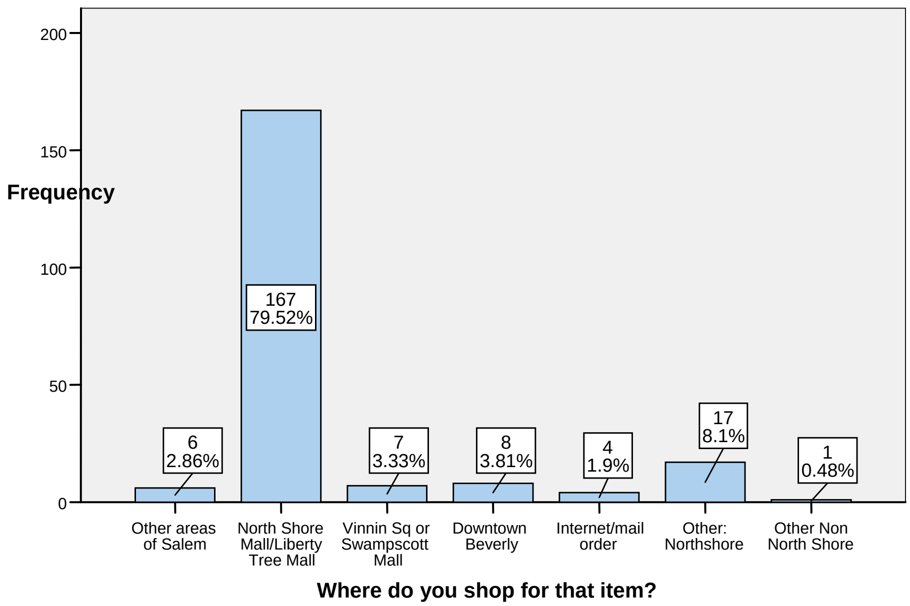




Highlights: Approximately 15% of respondents reported purchasing appliances primarily in Downtown Salem. Of those not using Downtown Salem for appliances purchases, approximately 74% purchased this good in North Shore Mall/Liberty Tree Mall.

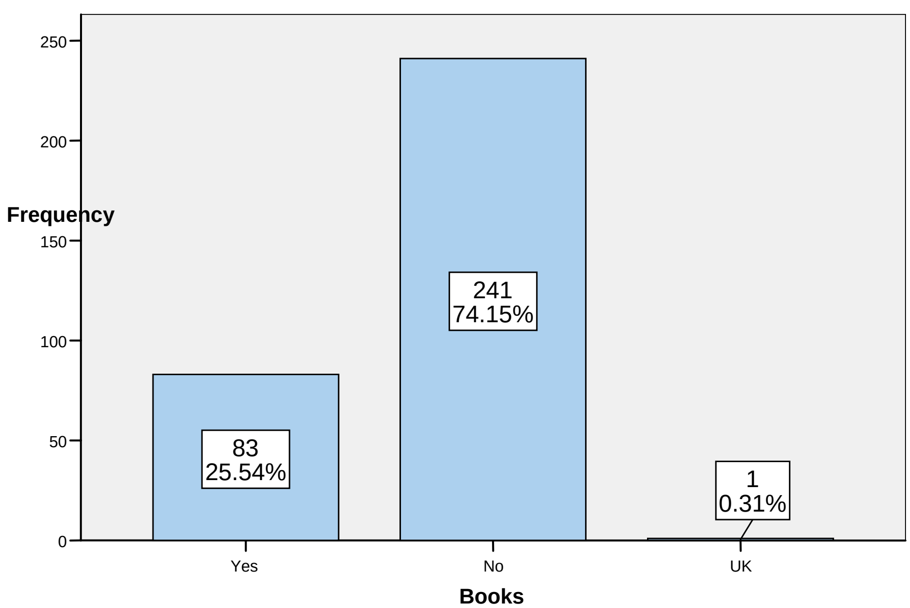


Where do you shop for that item?

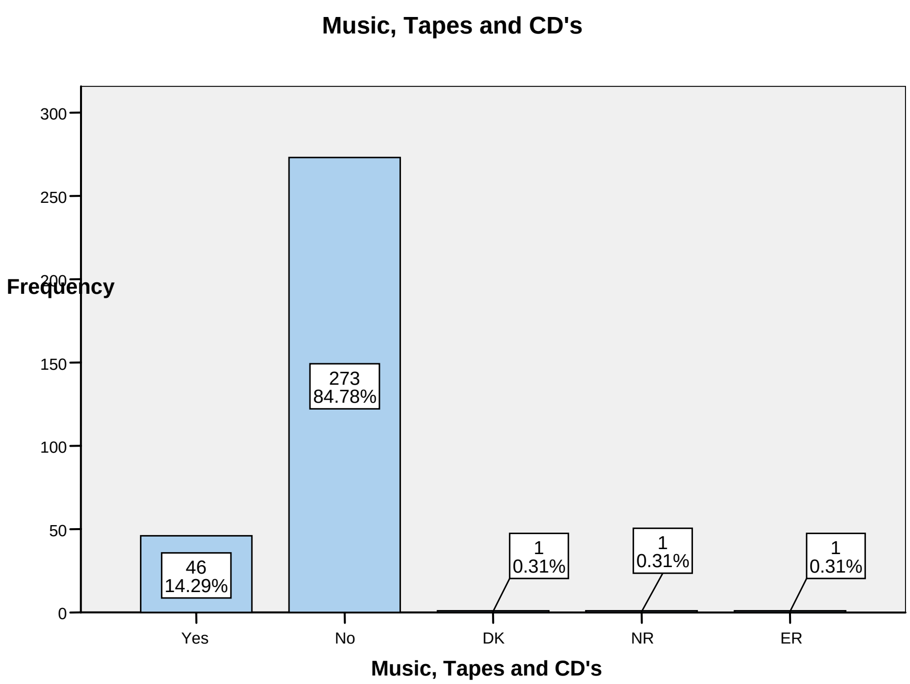


Highlights: Approximately 9% of respondents reported purchasing sporting goods and hobby supplies primarily in Downtown Salem. Of those not using Downtown Salem for sporting goods and hobby supplies purchases, approximately 80% purchased this good in North Shore Mall/Liberty Tree Mall.

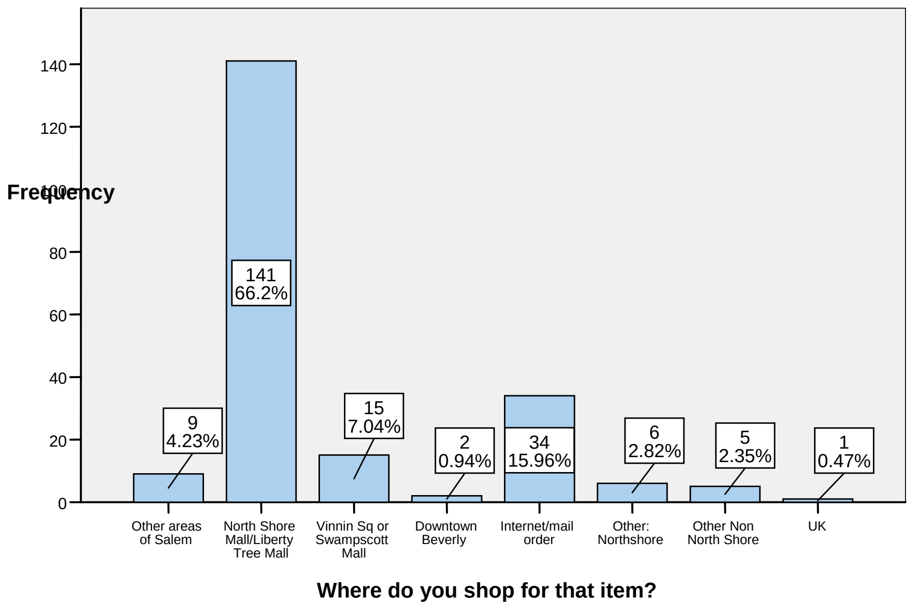
Books



Highlights: Approximately 26% of respondents reported purchasing books primarily in Downtown Salem. Of those not using Downtown Salem for books purchases, approximately 71% purchased this good in North Shore Mall/Liberty Tree Mall.

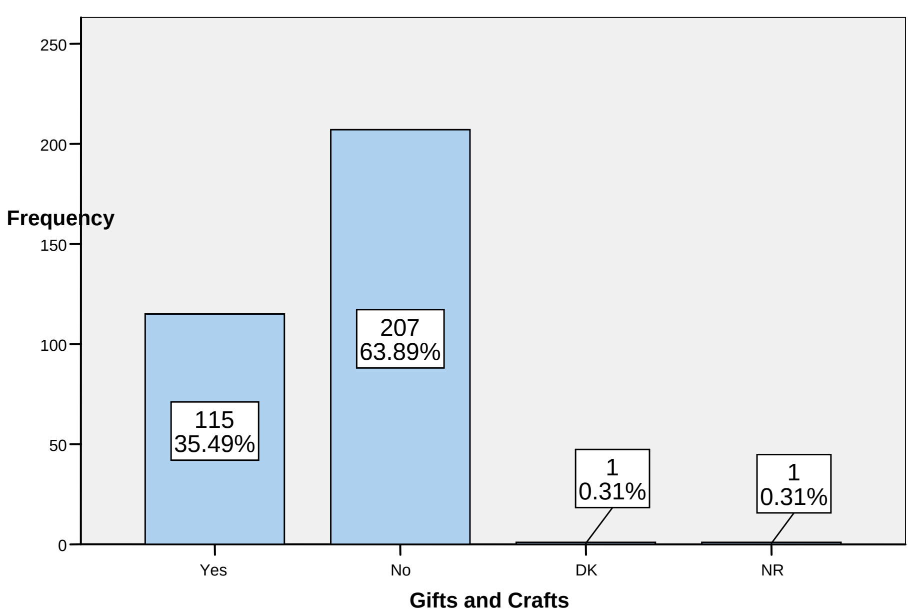


Where do you shop for that item?

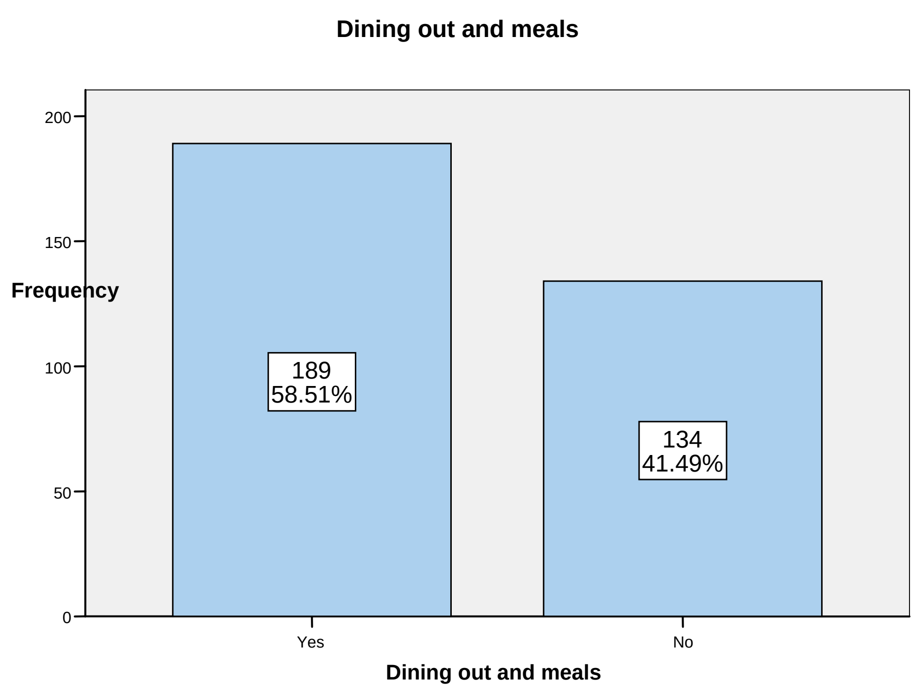


Highlights: Approximately 14% of respondents reported purchasing music, tapes, and CDs primarily in Downtown Salem. Of those not using Downtown Salem for music, tapes, and CDs purchases, approximately 66% purchased this good in North Shore Mall/Liberty Tree Mall.

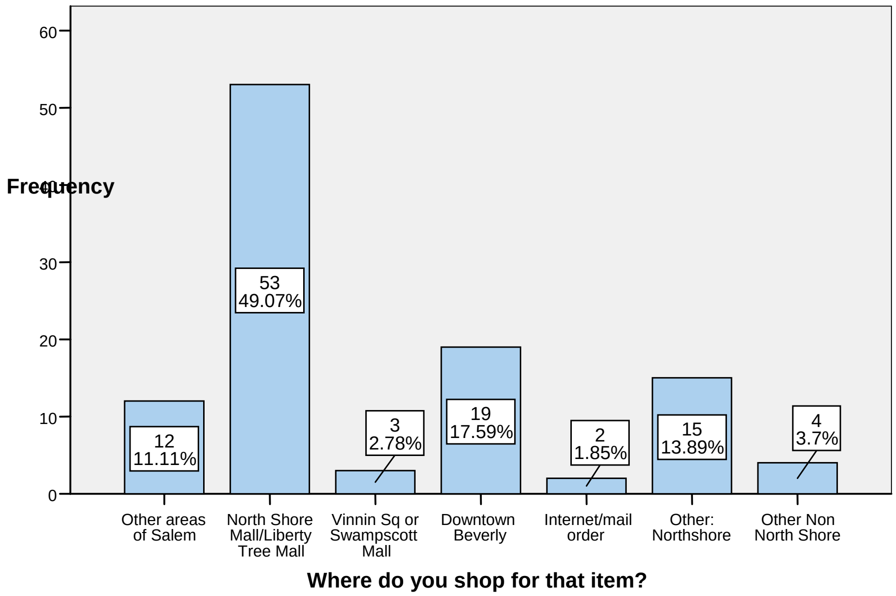
Gifts and Crafts



Highlights: Approximately 35% of respondents reported purchasing gifts and crafts primarily in Downtown Salem. Of those not using Downtown Salem for gifts and crafts purchases, approximately 76% purchased this good in North Shore Mall/ Liberty Mall.

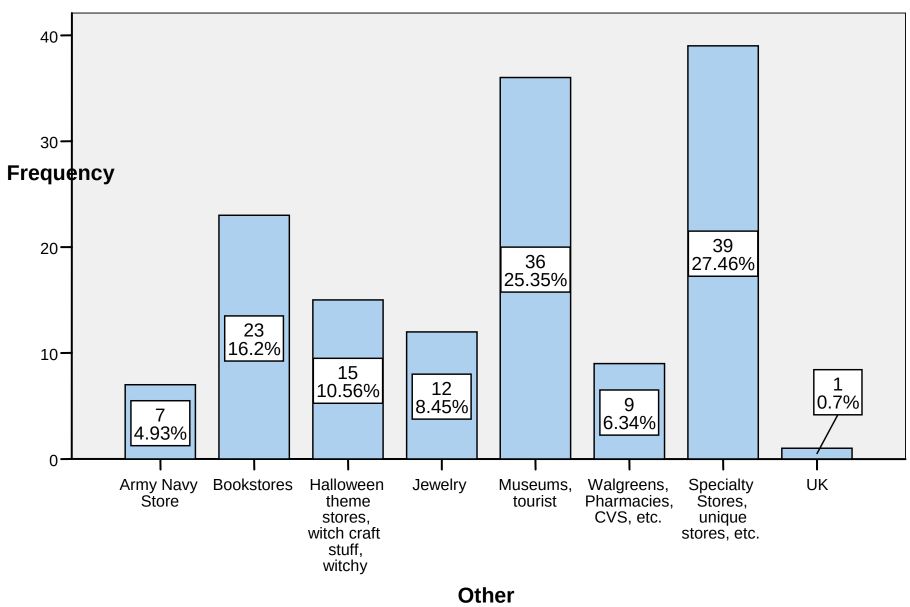


Where do you shop for that item?



Highlights: Approximately 59% of respondents reported using Downtown Salem as their primary choice for dining out and meals purchased. Of those not using Downtown Salem for dining out and meals, approximately 49% purchased this good in the North Shore Mall/Liberty Mall.

Other



Highlights: Respondents also reported the use of several other goods and services in the Downtown Salem area. The most common were specialty stores, museums and tourism, and bookstores.

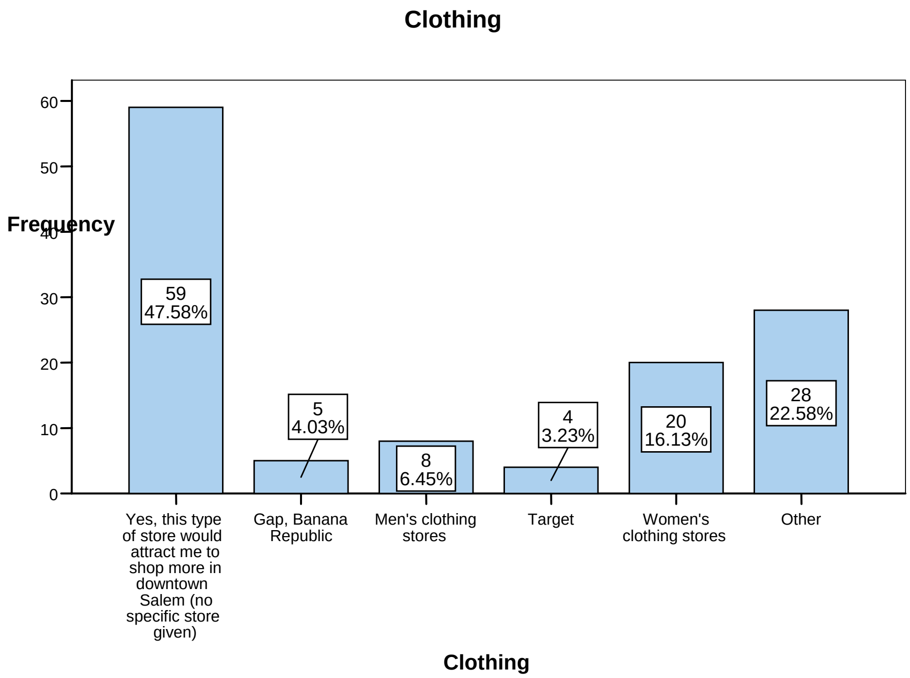
Citizen Response: What stores are located in Downtown Salem?

Is the following type of store located in Downtown Salem? Yes/No?	**Frequency** (N=360)	**Percent of Respondents**
Women's Clothing	33	9.2%
Men's Clothing	28	7.8%
Children's Clothing	18	5.0%
Music or Video Store	15	4.2%
Hobby/Craft Stores	60	16.7%
Gift Stores	114	31.7%
Home Furnishing/ Decorations	22	6.1%
Antique Store	34	9.4%
Grocery Store	14	3.9%
Gourmet Foods	15	4.2%
Bakery	19	5.3%
Restaurant	118	32.8%
Coffee/ Tea Café	32	8.9%
Movie Theater	15	4.2%
Other	142	39.4%

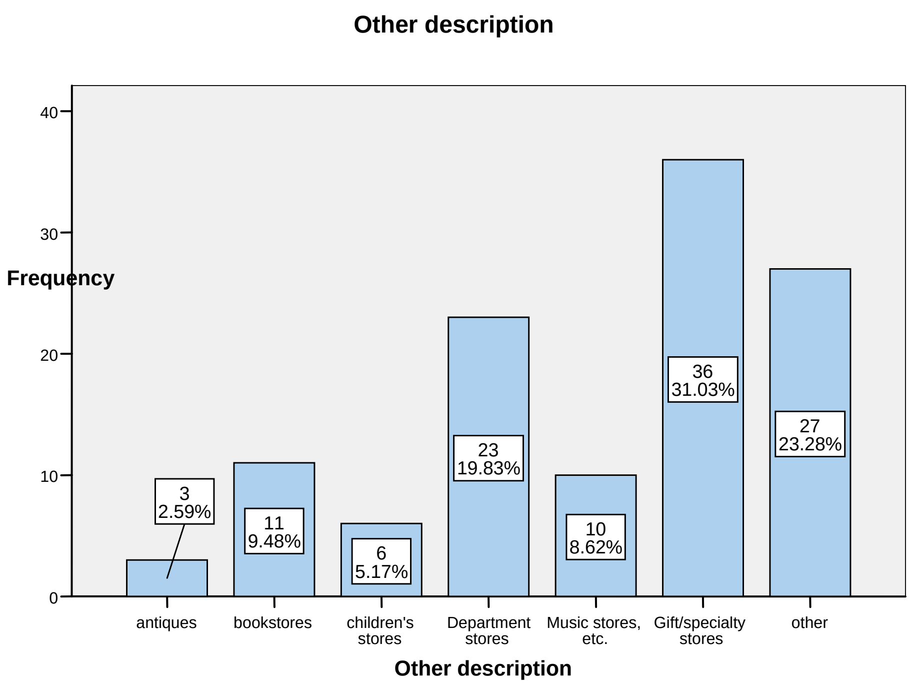
What New Stores Would Attract You to Shop in the Downtown Area?

Respondents were asked to report a type of new store or the name of a store that would attract them to shop in downtown more often. These results are reported below. A large number of respondents listed clothing as the type of shop that would attract them to the Downtown Salem area and this particular good is detailed below.

What new stores would attract you to shop in the Downtown Area?	Frequency	Percentage of Respondents
Furniture of Home Furnishings	21	5.8
Grocery Store	17	4.7
Clothing	59	16.4
Specialty Food Store	15	4.2
Office Supply/Stationary	9	2.5
Sports Goods	14	3.9
Restaurant	16	4.4
Antiques	3	.8
Bookstores	11	3.1
Children's Stores	6	1.7
Music Stores	10	2.8
Department Stores	23	6.4
Gift/Specialty Stores	36	10.0
Other	27	7.5



Highlights: Approximately 48% of respondents reported that clothing stores, in general would attract them to the Downtown Salem area for shopping. Specific stores named were Gap, Banana Republic, and Target.

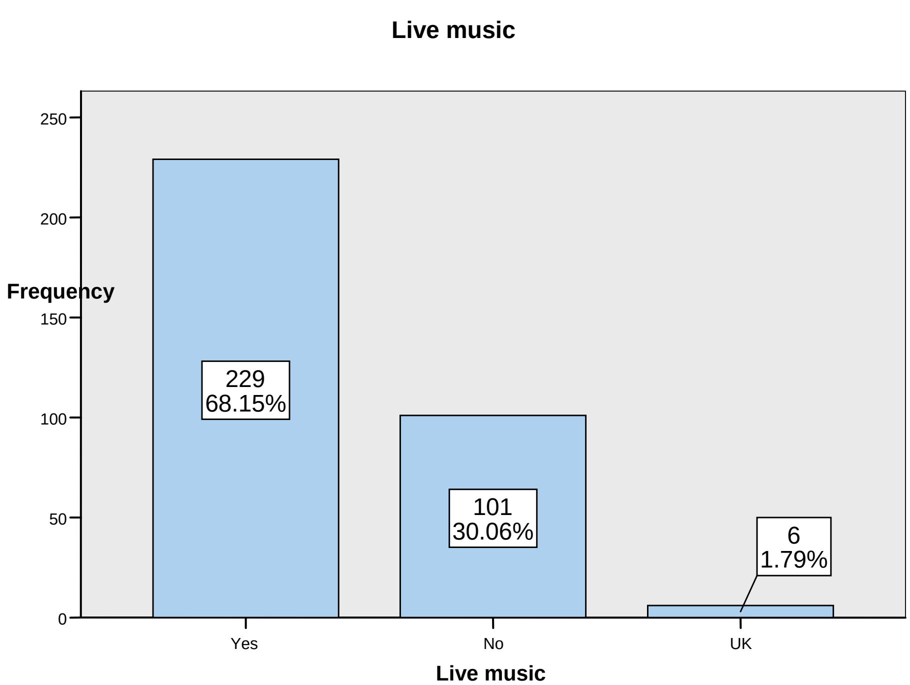


Highlights: When asked what types of stores would attract them to Downtown

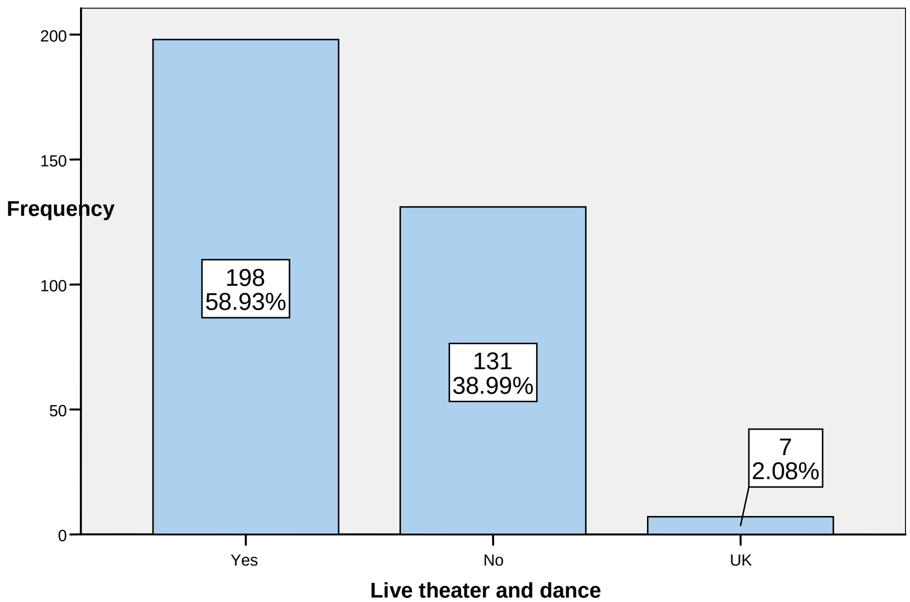
Salem area, approximately 31% reported the addition of gift and specialty stores and approximately 20% reported the addition of department stores. (Note clothing as a category is listed in the chart above).

Do Additional Arts or Entertainment Attract Respondents to Downtown Salem?

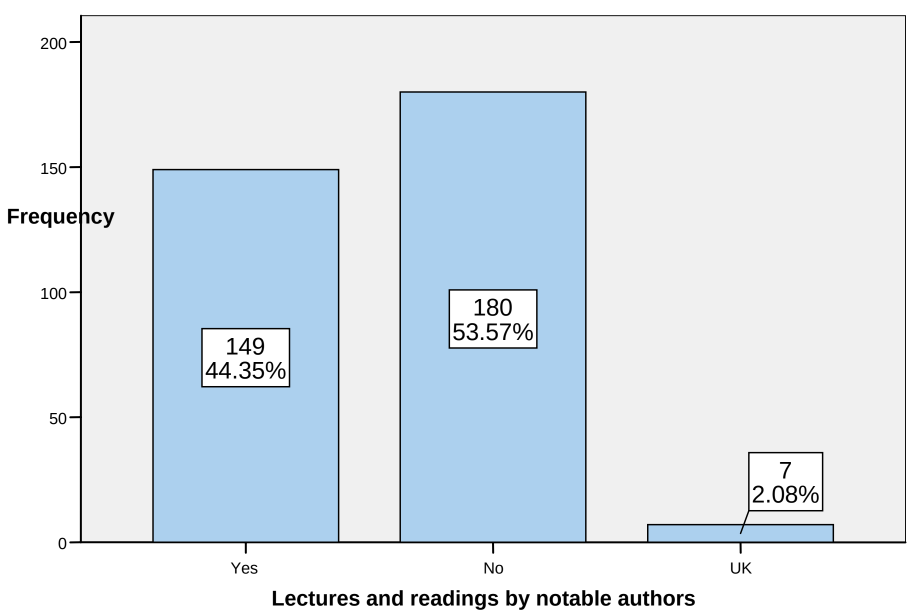
The following charts report on what types of arts or entertainment would attract respondents to Downtown Salem. The respondents reported “yes” when they felt that the addition of the specific art or entertainment would attract them to Downtown Salem, “no” when they felt that it did not and “do not know” when they did not know. In addition to the data below, ten respondents reported that other types of entertainment or arts would attract them to the region and four reported that it would not. There were 360 respondents for the survey and 336 responded to this question.

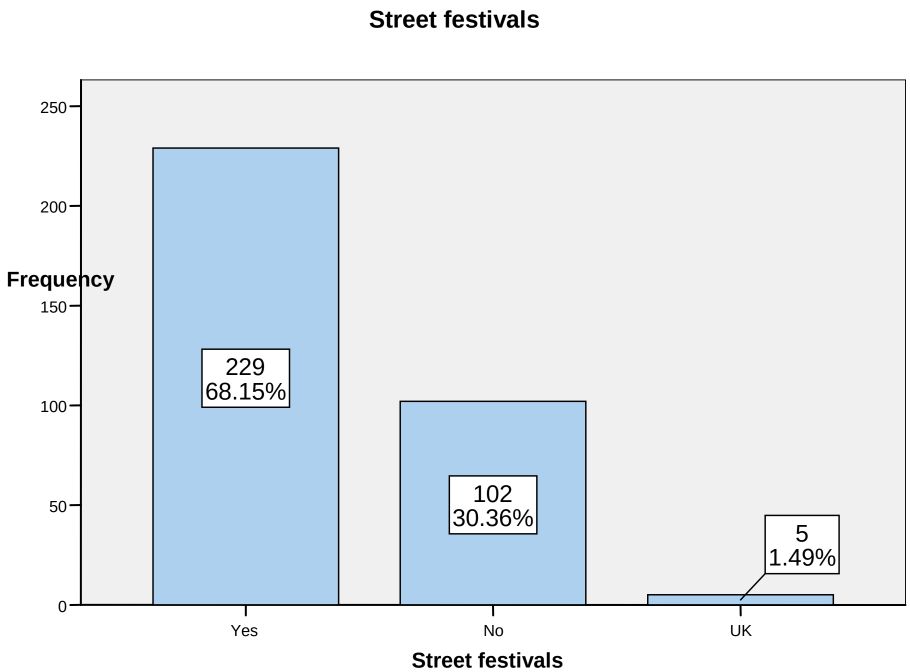


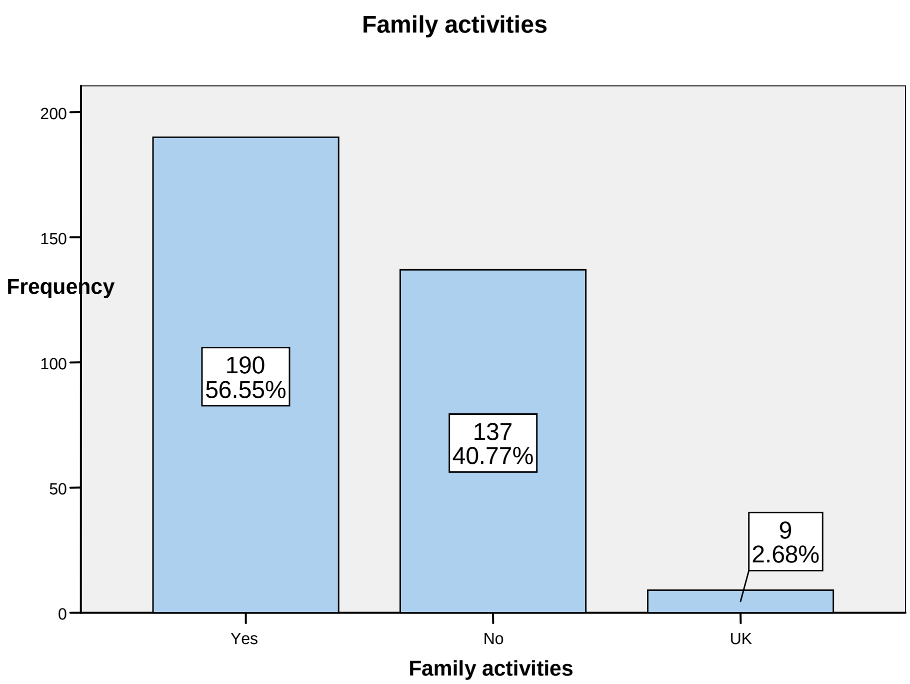
Live theater and dance



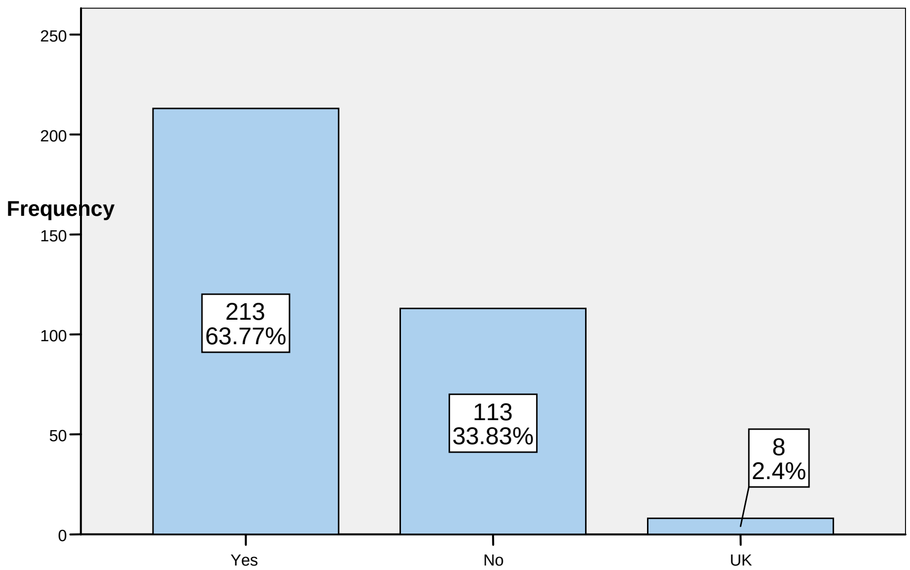
Lectures and readings by notable authors




Street festivals
Frequency
250
200
150
100
50
0
229
68.15%
102
30.36%
5
1.49%
Yes
No
UK
Street festivals


Family activities
Frequency
200
150
100
50
0
190
56.55%
137
40.77%
9
2.68%
Yes
No
UK
Family activities

Galleries and visual arts



Use of Newspapers

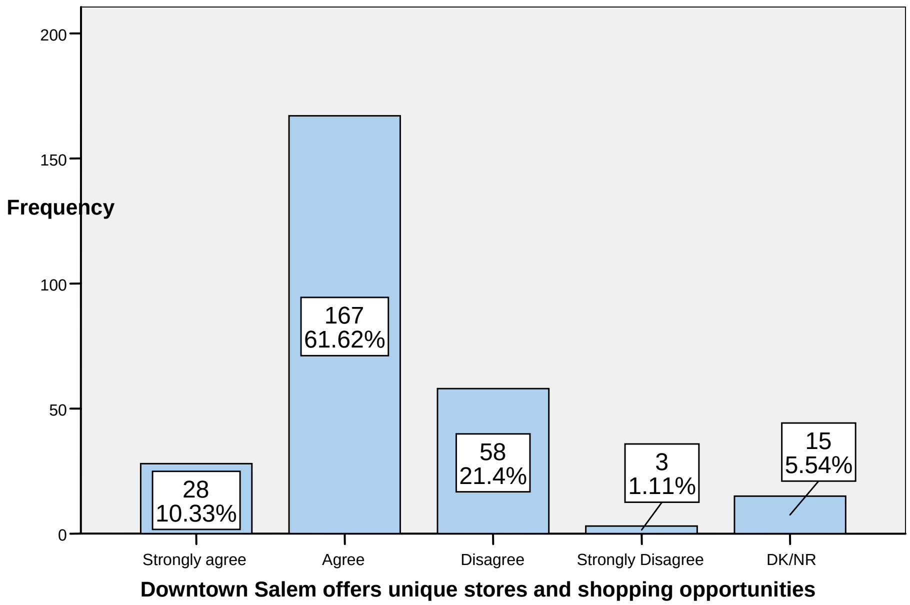
The following section reports on the use of newspapers as reported by citizens. Respondents were asked to list the newspapers they read regularly. Multiple responses were allowed.

Which newspapers do you read regularly?	Frequency	Percentage
Boston Globe	157	43.6
Boston Herald	58	16.1
Salem Evening News	152	50.6
North Shore Sunday	2	0.6
Salem Gazette	24	6.7
Beverly Citizen	11	3.1
Marblehead Reporter	17	4.7
Swampscott Reporter	8	2.2
Peabody Weekly News	4	1.1
Danvers Herald	11	3.1
Lynn Item	9	2.5
NY Times/NY Post	21	5.8
Wall Street Journal	7	1.9
Other	10	2.8

Statements about Downtown Salem

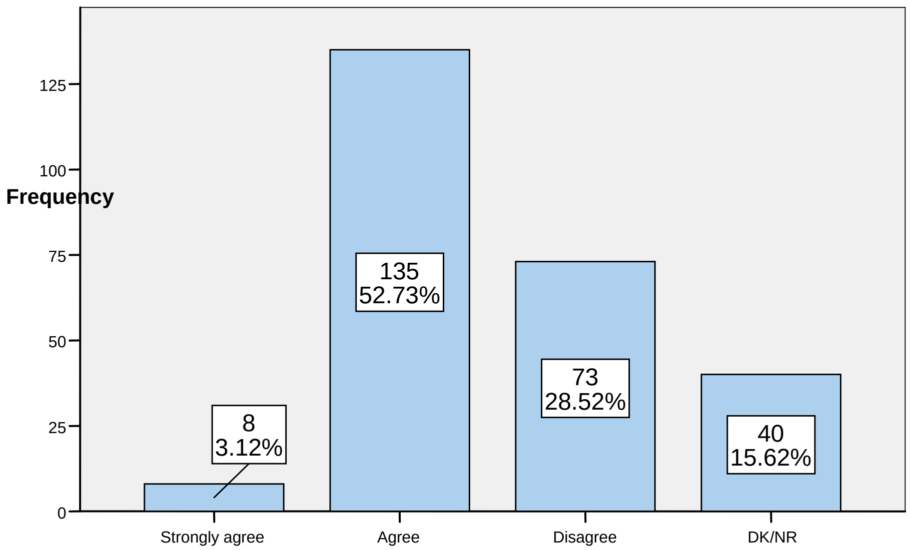
Respondents were asked to indicate the extent of their agreement/disagreement with the following statements.

Downtown Salem offers unique stores and shopping opportunities



Highlights: Approximately 62% of respondents agree or strongly agree with the statement that the area offers unique stores and shopping opportunities.

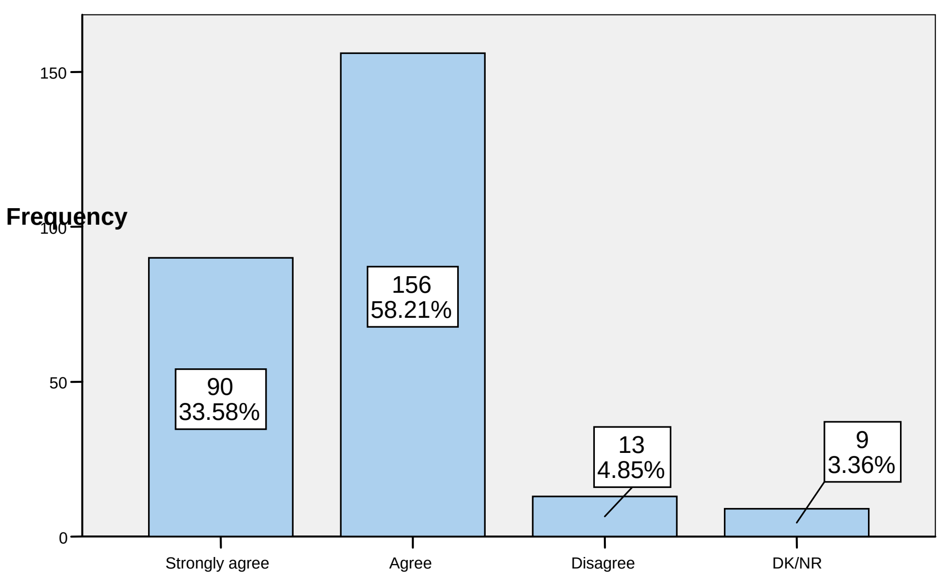
Merchants in downtown Salem are more helpful and friendly than in other stores



Merchants in downtown Salem are more helpful and friendly than in other stores

Highlights: Approximately 56% of respondents agree or strongly agree with the statement that the merchants in the area are more helpful and friendly.

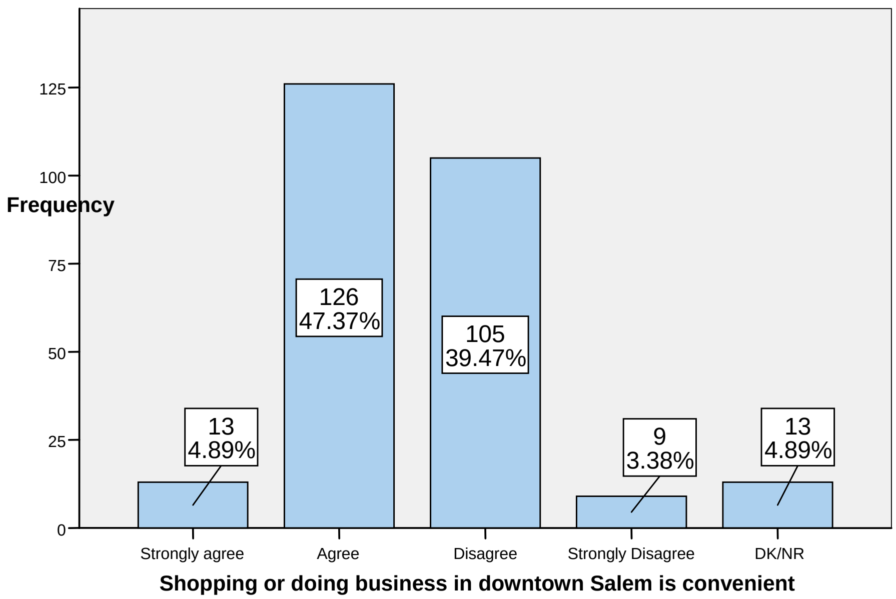
Downtown Salem's historic buildings and environment make it a special place



Downtown Salem's historic buildings and environment make it a special place

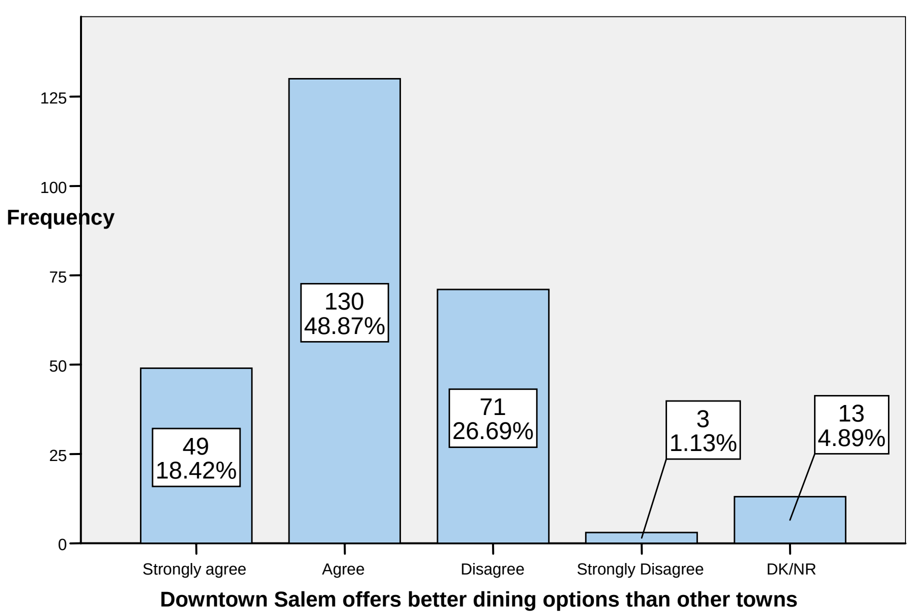
Highlights: Approximately 92% of respondents agree or strongly agree that the area's historic buildings and environment make it a special place.

Shopping or doing business in downtown Salem is convenient

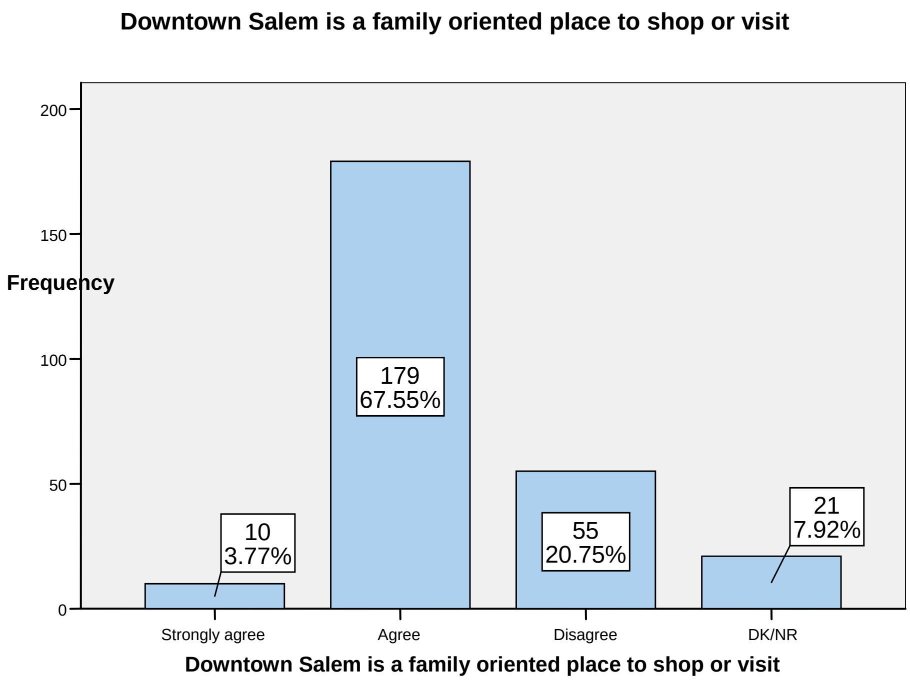


Highlights: Approximately 52% of respondents agree or strongly agree with the statement that the area is convenient, while approximately 43% disagree or strongly disagree.

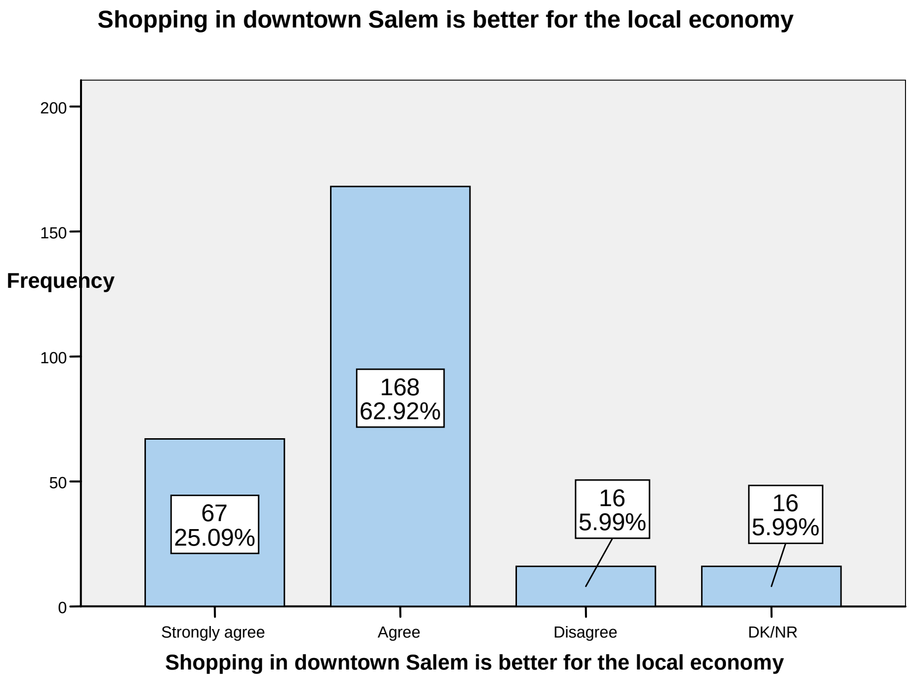
Downtown Salem offers better dining options than other towns



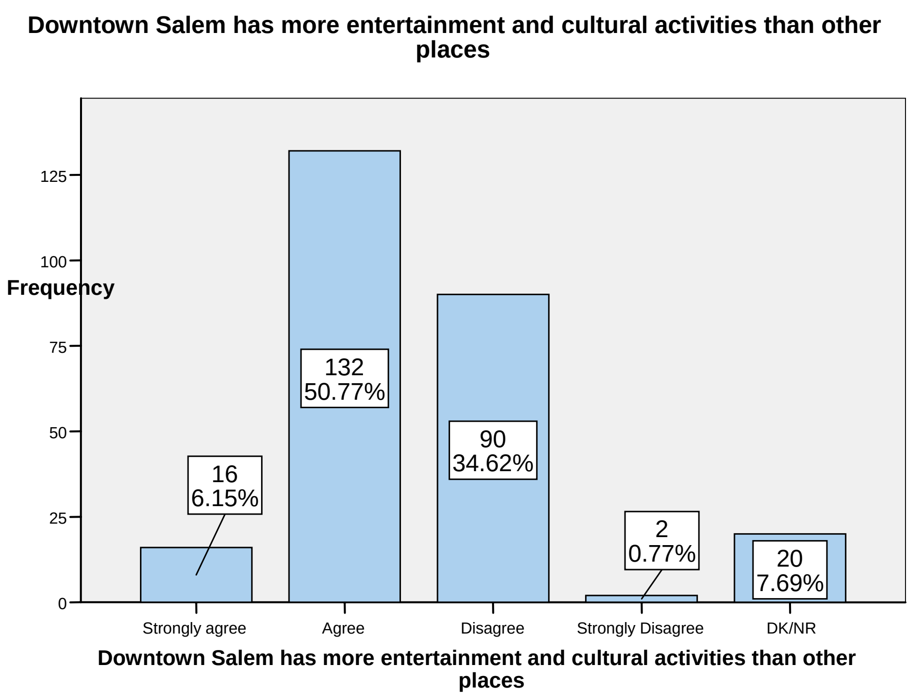
Highlights: Approximately 67% of respondents agree or strongly agree with the statement that the area offers better dining options than other towns, while approximately 28% disagree or strongly disagree.



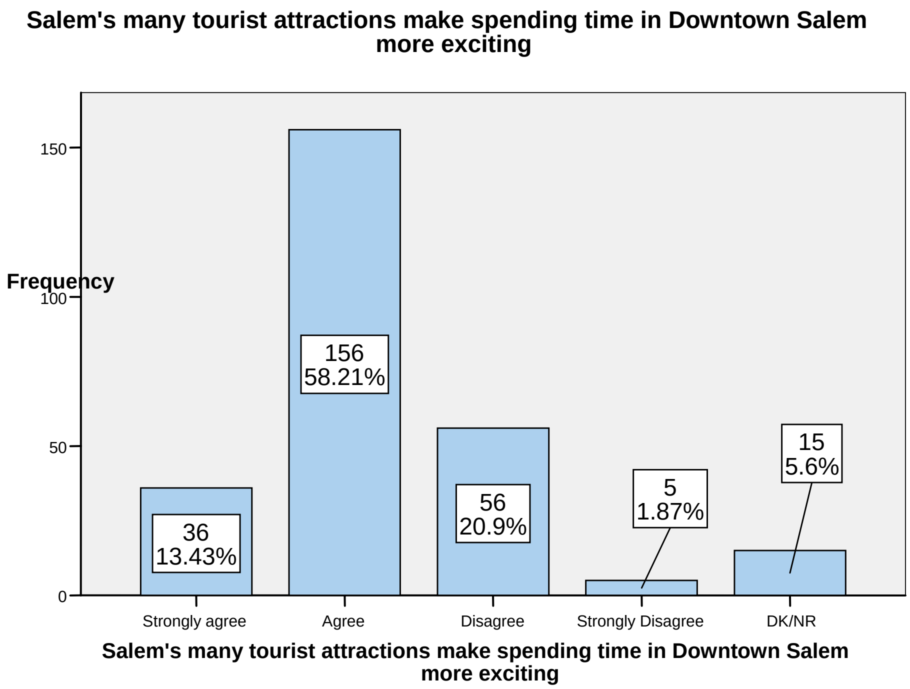
Highlights: Approximately 71% of respondents agree or strongly agree with the statement that the area is family oriented, while approximately 21% disagree.



Highlights: Approximately 88% of respondents agree or strongly agree with the statement that the area is better for the economy, while approximately 6% disagree.



Highlights: Approximately 57% of respondents agree or strongly agree with the statement that the area has more entertainment and cultural activities than other places, while approximately 36% disagree or strongly disagree.

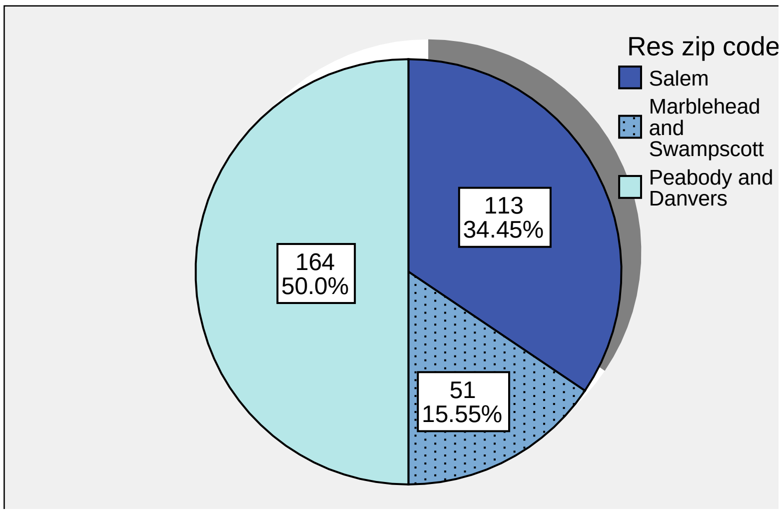


Highlights: Approximately 72% of respondents agree or strongly agree with the statement that the area’s tourist attractions make spending time in the area more exciting, while approximately 23% disagree or strongly disagree.

Demographic Information on Respondents

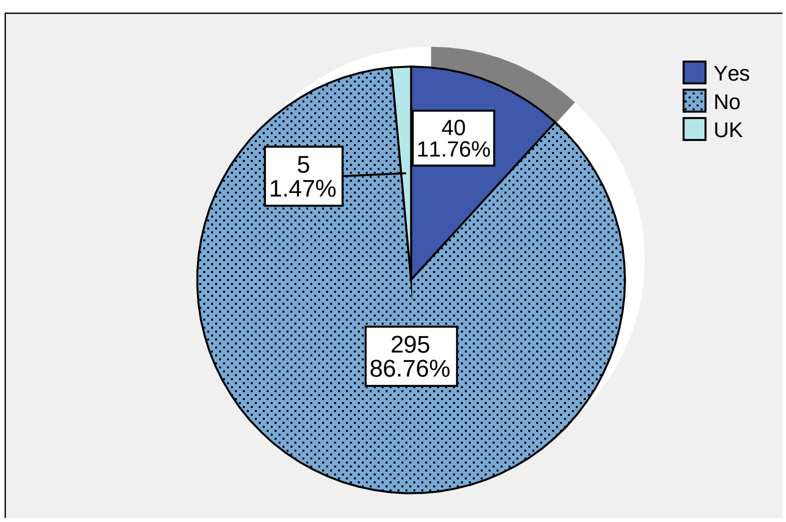
The following section is a summary of demographic information of respondents, including their zip codes, income, gender, and size of household.

Res zip code



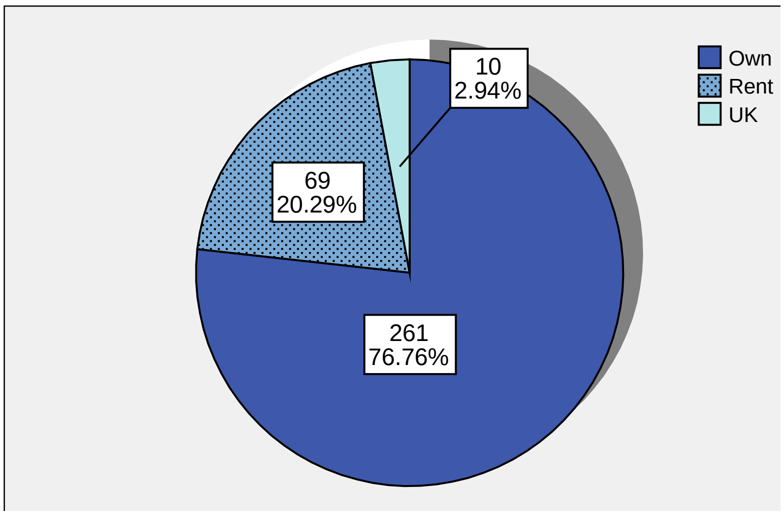
Highlights: 50% of respondents live in Peabody and Danvers, while 34.45% live in Salem and 15.55% live in Marblehead and Swapscott.

Do you or a member of your household work in downtown Salem?



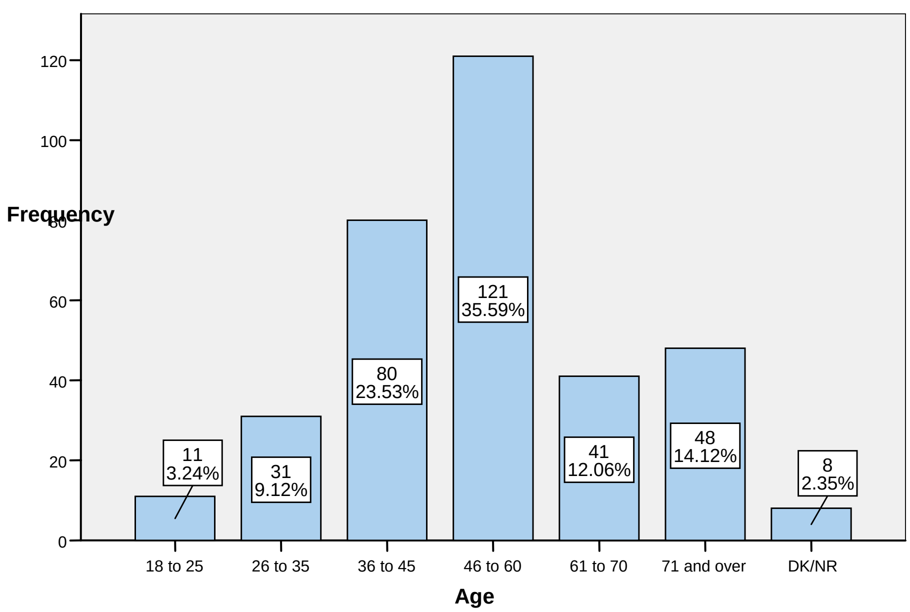
Highlights: Approximately 87% of respondents have a household member who works in Downtown Salem.

Do you own or rent your home?

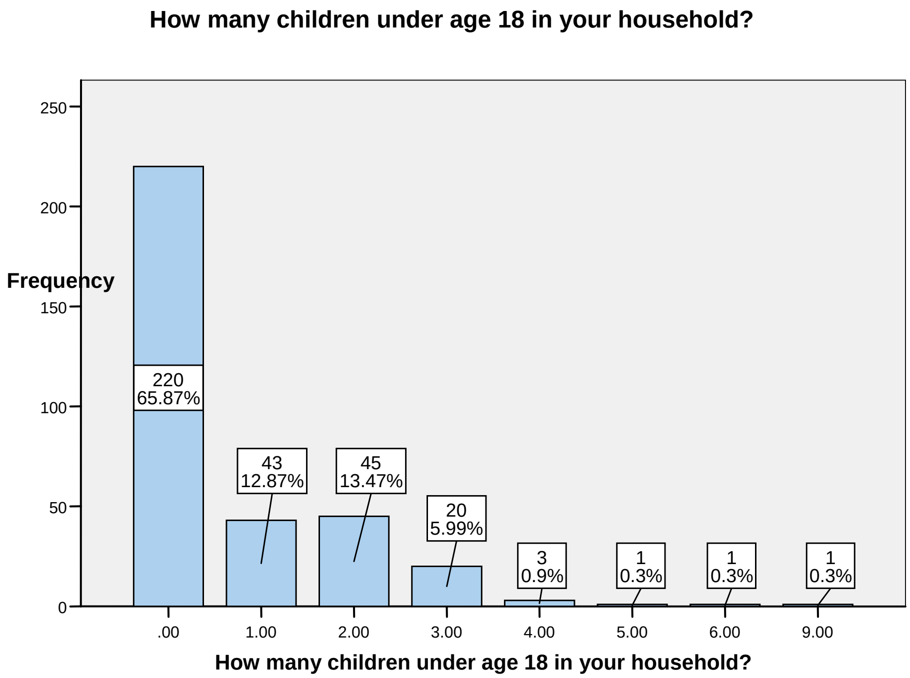


Highlights: Approximately 77% of respondents own their home and approximately 20% rent.

Age

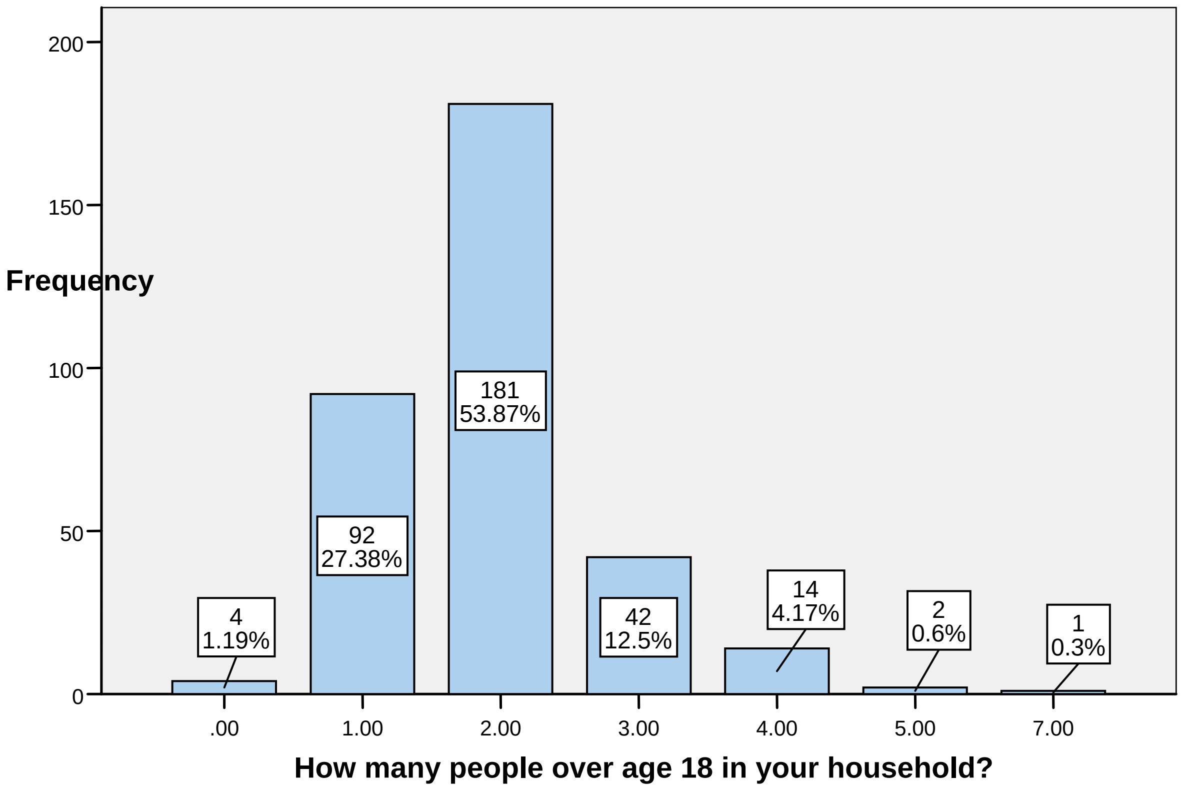


Highlights: Approximately 36% of respondents were aged between 46 and 60, while approximately 24% were aged 36 to 45.

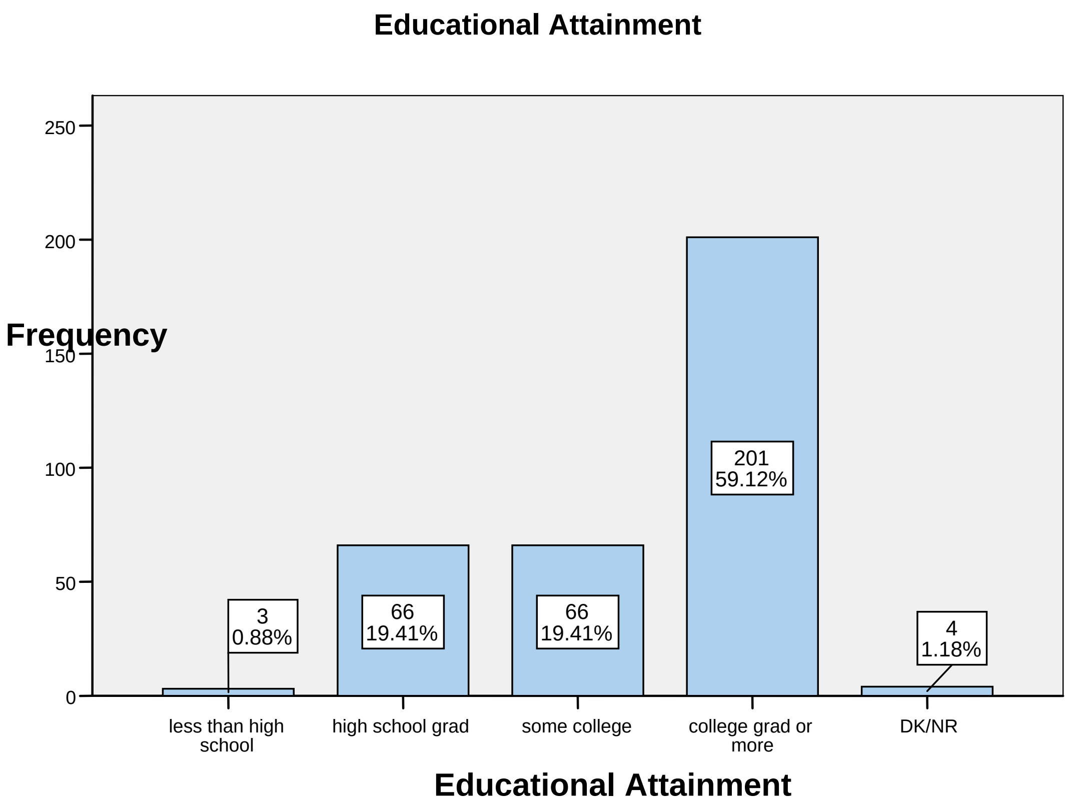


Highlights: Approximately 66% of respondents had not children under the age of 18 living in their home, while approximately 26% had one or two children living in the household.

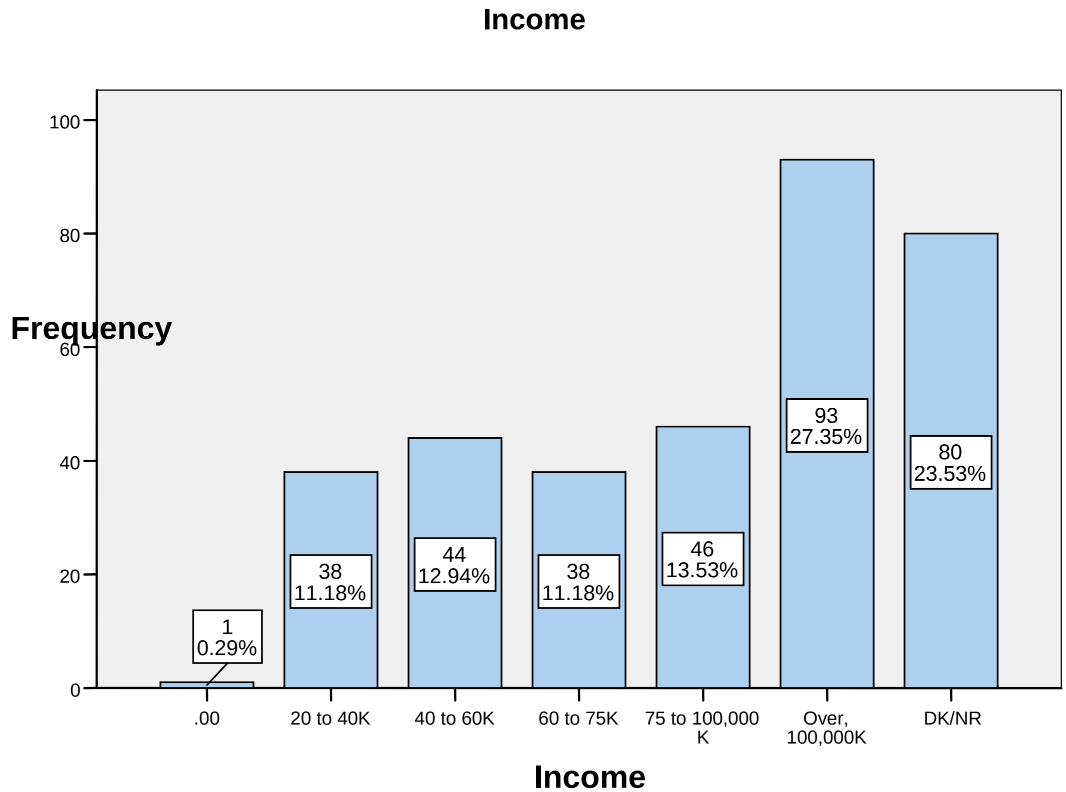
How many people over age 18 in your household?



Highlights: Approximately 54% of households had two members over the age of 18, while approximately 28% had a one member household.

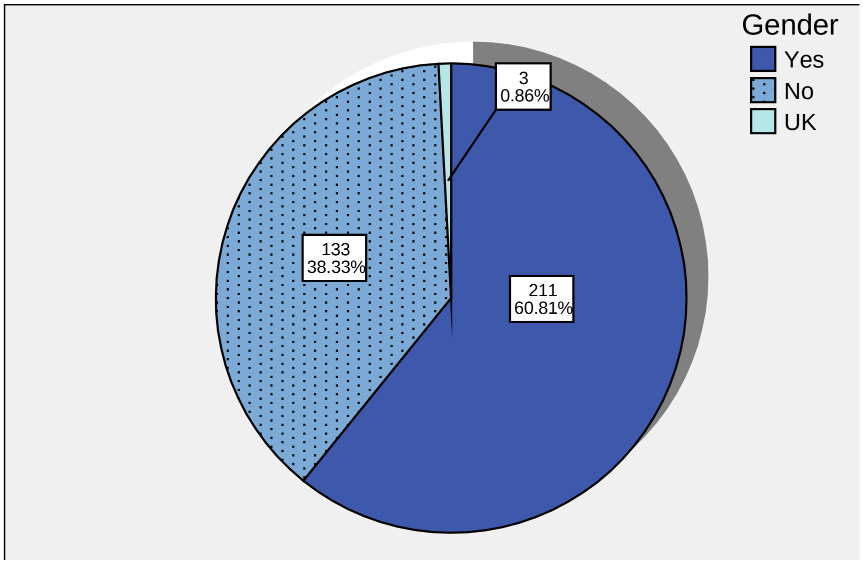


Highlights: Approximately 59% of respondents received at least a college degree and 19% had attended some college.



Highlights: Approximately 27% of household had income over $100,000 per year, while approximately 14% had income from $75,000 to $100,000 and approximately 11% had income from $60,000 to $75,000.

Gender



Highlights: Approximately 61% of respondents reported being female and approximately 38% reported being male.