

## Results of the South Orange Village Center Consumer Survey

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Following is a summary of the results of the consumer survey conducted by JGSC Group (JGSC) on behalf of the South Orange Village Alliance. The survey was conducted between April 26 and May 27, 2014. The survey asked 34 questions about the South Orange Village Center (Village), to better understand the wants, needs, desires and perceptions of consumers and Seton Hall University students.

Before the survey was launched, JGSC established a goal of 400 completed surveys. To achieve this goal, the survey was supported with small roadside signs, flyers distributed to local merchants, ads and press releases in the local media, an email blast by Seton Hall University to students and staff, and other outreach efforts. We received a total of 1,969 survey responses, or 490% of goal, resulting in a 2.3% margin of error.

Of the 1,969 responses received, 1,032 (53%) were from residents and visitors (consumers) and 917 (47%) were from students of Seton Hall University (students). JGSC examined the responses from each of these groups and determined the following.

**Origin of respondents** – Based upon the responses home ZIP code (Q1).

- 84% of consumer respondents live in South Orange ZIP code 07079.
- 6% of consumer respondents live in Maplewood ZIP code 07040, and 2% live in Orange ZIP code 07052.
- 36% of student respondents live in South Orange ZIP code 07079. This most likely includes students who live in local dormitories or apartments during the school year, but their family may live outside of the ZIP code.

**Purpose of visit or reasons to not visit** – We asked respondents to tell us the main reasons why they visit the Village, and the main reasons they don't visit more often.

- The primary reason consumers come to the Village is to visit a restaurant (77%) and use the train (68%). Just 36% of consumers come here to shop in the stores.
- 61% of consumers and 53% of students don't visit more often because there are too few stores and the selection is limited.
- 43% of consumers and 30% of students don't visit more often because the selection of restaurants is limited.
- 35% of consumers and 35% of students don't visit more often because there are too few restaurants.
- 33% of consumers and 38% of students said that parking is one of the main reasons they don't visit the Village more often.

**Level of satisfaction or dissatisfaction** – We asked the respondents to rank their level of satisfaction or dissatisfaction with various downtown topics.

- Consumers expressed the highest level of satisfaction with transit access (87%), walkability (75%), cleanliness/streetscapes (57%), and safety (50%).
- Consumers are dissatisfied with downtown shopping (57%), parking (48%), restaurants (37%), and the overall downtown experience (31%).
- Students expressed satisfaction with walkability (77%), transit access (76%), cleanliness/streetscapes (73%), restaurants (59%), and the overall downtown experience (54%).
- Students are dissatisfied with downtown shopping (43%), parking (42%), and downtown entertainment (31%).

**Importance of initiatives** – We asked respondents to tell us how important it is to accomplish the following initiatives.

- 81% of consumers and 67% of students said it is “very important” to attract new retail businesses.
- 68% of consumers and 71% of students said it is “very important” to attract more restaurants and eating places.
- 66% of consumers and 55% of students said it is “very important” to attract more shoppers to downtown.
- 65% of consumers and 47% of students said it is “very important” to actively pursue the revitalization of storefronts and building facades.
- 55% of consumers and 70% of students said it is “very important” to provide more public parking spaces.

**Retail stores wanted** – We asked respondents if they would visit more often for the following types of stores.

- 75% of consumers and 69% of students said they would visit more often for full-service restaurants.
- 65% of consumers and 60% of students said they would visit more for fresh produce.
- About 2 in 5 respondents said they would visit more for a seafood/fish market, butcher, baked goods, shoes, women’s clothing, home décor, and limited-service restaurants.
- About 3 in 10 respondents said they would visit more often for antiques/vintage merchandise, children’s clothing, hobby and craft supplies, and men’s clothing.

**Attendance at events** – We asked respondents which events they have attended in the past, and if they would attend a one-night-a-month shopping event.

- 54% of consumers and 68% of students said they “probably would” attend a one-night-a-month shopping event in the downtown.
- 87% of consumers and 58% of students have attended the Farmers Market.

- 54% of consumers and 23% of students have attended a Sundown concert.
- 45% of consumers and 18% of students have attended Celebrate S. Orange.
- 38% of consumers and 53% of students have attended Restaurant Week.

**Safety and security** – Consumers and students both feel comfortable in their home neighborhoods, while visiting the downtown, and at SOPAC.

**Transportation** – We asked about the respondent’s use of the train station and transportation to the Village.

- 87% of consumers and 64% students have driven to the Village.
- 57% of consumers and 64% of students have walked or biked to the Village.
- 6% of consumers and 9% of students take the train to reach the Village.
- 59% of consumers and 15% of students use the train for business/work.
- 63% of consumers and 80% of students use the train for business/work.
- 29% of students use the train to/from the campus.
- 42% of consumers use the train at least a few times a week. 94% of those consumers live in ZIP code 07079.
- 72% of consumers and 54% of students use the train at least a few times a month.

**Parking** – We asked consumers and students about the availability of parking, their level of satisfaction with parking, and whether or not it impacts their decision to visit the Village.

- 42% of consumers said they can “always” or “usually” find parking in the Village.
- 38% of consumers said they can “sometimes” find parking.
- 28% of students said they can “always” or “usually” find parking in the Village.
- 42% of students said they can “sometimes” find parking.
- 27% of consumers are satisfied with parking in the Village, while 48% are dissatisfied.
- 25% of students are satisfied with parking in the Village, while 42% are dissatisfied.
- 33% of consumers and 38% of students said that parking is one of the main reasons they don’t visit the Village more often.

**Value of media** – Nearly 45% of consumers and students rated all media as “not valuable.” Among other consumers, the most valued media is *Maplewood Online* and the *South Orange Patch*. Students place value on NJ.com, the *South Orange Patch*, and the *Star Ledger*.

**Demographics** – The survey achieved a good sampling of the demographic segments based on gender, age, and home ownership. Consumers that responded to the survey generally had higher income levels than is found in the general population. For example, households with an income of \$200,000 or more represent 6% of the population, but 47% of respondents. We think this occurred due to some “exaggeration” among respondents, but we think it also reflects rises in income levels that is not yet appearing in available syndicated data reports.