

**SURVEY OF MERCHANTS AND PEDESTRIANS
IN
DOWNTOWN WILMINGTON**



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**A REPORT
TO
THE DOWNTOWN WILMINGTON IMPROVEMENT CORPORATION**

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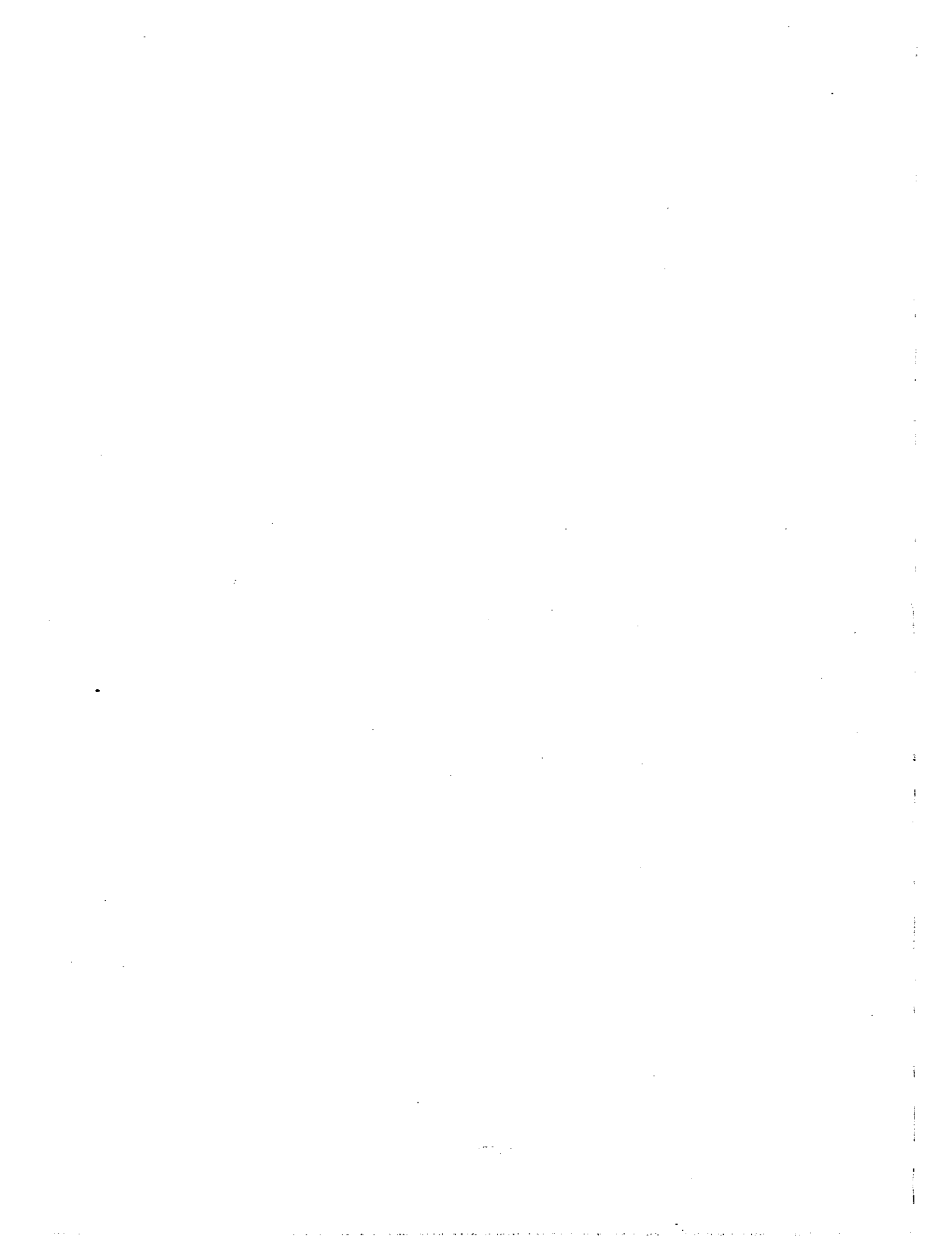
This study was undertaken by the Downtown Wilmington Improvement Corporation (DWIC), Inc. The staff of the University of Delaware's College of Urban Affairs and Public Policy assisted in the design of the questionnaires and in the development of data collection procedures to survey merchants and pedestrians in downtown Wilmington. Procedures for coding and computer processing of the returned questionnaires were developed by Michael Guilfoyle, a doctoral candidate in the College's graduate program.

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EXECUTIVE SUMMARY

This report summarizes the results of surveys of merchants and pedestrians in downtown Wilmington. During November 1984, questionnaires were distributed to 158 businesses located on Market Street, 9th Street, and adjacent side streets. A total of 67 questionnaires were returned and tabulated. The purpose of the merchant survey was to develop an overall understanding of the characteristics of businesses in the downtown and of business trends and practices. In addition, the survey was designed to determine merchant views about advertising and promotion, transportation, parking, security, and mall maintenance and improvement, as well as other issues.

In February 1985, 282 pedestrians were interviewed in three locations in the downtown. The purpose was to determine how frequently pedestrians shop for various items in the downtown, to identify their income, occupational, residential, racial, age and gender characteristics, and to find out how they feel the downtown can be improved as a shopping center.

Chapter One summarizes the results of the merchant survey. Chapter Two summarizes the results of the pedestrian survey. An Appendix, submitted to the Downtown Wilmington Improvement Corporation under separate cover, provides detailed information on the frequency of responses to the questions in both the merchant and pedestrian surveys.

Methodology and Tabulation. For both the merchant and pedestrian surveys, an effort was made to obtain samples that would be representative of the businesses and the pedestrian traffic in the downtown. Responses were coded, tabulated and analyzed by staff members of the College of Urban Affairs and Public Policy. In addition to examining the overall response patterns of merchants and pedestrians, the responses of selected subgroups were also analyzed.¹ The merchant subgroups represent types of business (food, retail, or service), location in the downtown (Lower Market Street, Upper Market Street, 9th Street, or other areas such as Orange Street), sales trend of business (better than, same as, or worse than expected), and image of the downtown (improving, staying the same, or deteriorating). The pedestrian subgroups represent household income level, occupation, location of residence (Wilmington, non-Wilmington), location of work place, age, race and gender.

Merchant Survey

Background Information. The businesses in downtown Wilmington are, for the most part, independent firms with less than 3000 square feet of space and five employees or less. Just under a

¹The detection of differences in the responses of subgroups was made by the use of statistical tabular analysis. These techniques indicate the varying degrees of response differences across subgroups with regard to a particular question. The more important and statistically significant response patterns are reported in the following text. Selection of these patterns was guided by the level of difference and the number of responses in a subgroup.

third of the businesses are owner-operated. Less than one in five are chain or branch firms. Many have been at their present location for at least three years and a surprising number (over 50 percent) have been there for ten years or more. It would seem that the Wilmington CBD has a solid foundation of well-established, small businesses. The possibility for further residential development in the CBD is suggested by the low percentage (only 5 percent) of businesses with occupied residential units in their buildings.

Business Trends and Practices. For over half of the businesses responding to the survey, the business climate in downtown Wilmington--as measured by the expectations of the respondents--has been positive. Service firms seem to be doing better than retail stores or restaurants, and, surprisingly, the respondents representing the youngest firms are more likely to say that sales over the last two years have been better than they had expected.

Changes in merchandising by the individual businesses and changes in the general economy are most frequently identified as having had a positive impact on sales, while changes in the availability of parking and competition from other businesses are most frequently cited as having had a negative impact. For the most part, there are no significant differences among the types of businesses in their assessment of the impact that various factors have had on sales trends, except that respondents representing restaurants are more likely to feel that changes in the customer

base and changes in merchandising have had a positive impact. In addition, those who have a more positive view of trends in the downtown (i.e., that the downtown is improving), more positively evaluate the impact of certain factors--such as mall maintenance, real estate development along the mall, and changes in the general economy.

Fixing-up storefronts is most frequently cited as a very important action for merchants to take to improve business in the downtown, followed by improving the quality of merchandise and coordinating sales and promotions. In general, respondents representing restaurants are the most concerned about merchant action to improve business, perhaps because their sales over the last two years have not matched their expectations.

Advertising and Promotion. Coordinated advertising and promotion is perceived as one of the more important merchant actions to improve business in the downtown, but there is not a great deal of consensus regarding how this coordination should be accomplished. Only one respondent in ten indicates that his or her business coordinates sales with Market Street Mall events. While 55 percent of the respondents say that these events have no beneficial impact on their business, almost 60 percent say that they would like to see more activities along the mall and another 13 percent say they would like to see the same amount but want different kinds of activities. Noon-time events are regarded by some as causing a decrease in business, but sidewalk sales and

dollar days are popular activities. The latter are most frequently selected as the kind of activities respondents would like to have more often.

A number of suggestions are offered as to the type of stores, goods, and/or services that are needed in the downtown to increase business and shopper traffic. A large department store and a hardware store are most frequently cited, but other suggestions--receiving only one or two mentions, such as a kitchen or gourmet shop--may have merit. Each of these proposals should be examined carefully to determine whether there is appropriate space, location, and market for the particular type of store, good or service.

Respondents perceive the downtown in fairly positive terms. While no one is willing to say that the downtown is "dynamic," just over half feel that it is improving. Only 17 percent feel that the downtown is "on the decline" or "terrible."

Transportation and Parking. Nearly 70 percent of the respondents say that parking for their customers is not adequate. This is particularly true for retailers (87 percent feel it is not adequate). Parking is more of a problem for 9th Street merchants and less of a problem for those located on lower Market Street. There is no consensus among the respondents as to where additional parking should be located. Some feel that the downtown should have more high-rise parking garages, others would like more time on meters or more metered areas, and some want fewer metered

areas. The location of additional parking favored by a respondent is closely related to the location of his or her business in the downtown.

Only one in five respondents advertises the availability of parking in the downtown, and less than a third take advantage of the validated parking program. Some believe that the program is not useful or that there is not enough demand, and others are not aware of it. There is some support (42 percent) for a Park-and-Ride program operated by DART, but a quarter of the respondents do not know if such a program would be useful in bringing customers downtown.

Security. According to the respondents, shoplifting and loitering are the most serious security problems. Those who represent businesses with poorer than expected sales trends are more concerned about particular security problems, such as shoplifting, teenager harassment of customers, and employee theft. In general, those who represent restaurants are more concerned about security in the downtown, perhaps because restaurants are more likely to be open in the evening. A respondent's concern about security varies in relation to the location of his or her business in the downtown. Lower Market Street merchants are more concerned about shoplifting, teenager harassment, and inadequate police protection. Those on upper Market Street are more concerned about loitering. On the whole, the 9th Street merchants are the least concerned about security issues.

Capital Improvements/Mall Maintenance. Only one in five respondents feels that the present design of the Market Street Mall encourages patronage of his/her business. The features of the mall that are perceived as most pleasing are the plants and the trees. Signs and, by a significant margin, the kiosks are the most displeasing. Respondents representing food establishments and those who have negative images of the downtown (as "on the decline" or "terrible") are more likely to be negative about the design features of the mall.

About 40 percent of the respondents have problems with truck deliveries to their business. Restaurants and businesses located on upper Market Street have the most problems, while service firms and businesses located on lower Market Street have the least. Truck deliveries at the rear of a business are a problem for merchants located on 9th Street. Trash collections are very adequate or somewhat adequate for the majority of the respondents, but 16 percent feel that they are not at all adequate. Nearly 70 percent would like the mall attendant to clean the front entrance of their business twice every week; however, only 20 percent are willing to pay \$5 per week for the service.

Respondents oppose the use of pressure on property owners to board up vacant storefronts. The favored approaches to the vacant storefront problem are to allow artists to set up exhibitions or merchants to display merchandise. On the question of remodeling facades, a substantial proportion of the respondents

would be willing to consider this improvement if some form of financial assistance were available. Less than 30 percent said they would not be willing to remodel, and many of these respondents may represent businesses that have recently completed work on their facades.

General. A substantial amount of interest was expressed in a series of seminars on topics such as merchandising techniques, advertising and promotion, customer relations/sales, and security. The interest is highest among merchants located on 9th Street and among merchants whose sales trends have been better than expected. Only 17 percent of the respondents feel that a day-care facility located on the mall would be beneficial to their business.

Attitudes toward development in the downtown are closely linked to business location in the downtown. The farther away the development, the less likely it is that a merchant feels it will have a positive impact on his or her business. Thus, lower Market Street merchants are least in favor of development in the Delaware Avenue/Jefferson Street area and in the Brandywine Gateway, while 9th Street merchants are least in favor of development in the Christina Gateway.

Among all of the merchants, development in the Christina Gateway is the most popular, while development along the Christina River and in the Brandywine Gateway is the least popular. Representatives of restaurants are generally more negative about develop-

ment in all the areas, while representatives of service firms are more positive. Those with more positive views of the downtown are also likely to be more toward development.

Pedestrian Survey

Characteristics of the sample. The respondents to the pedestrian survey are about equally divided between males and females. Three-quarters are white, and one-quarter are nonwhite. The number of younger and older persons is somewhat less than would be expected in a general population since these groups are less likely to be employed in the downtown during the day.

A substantial proportion of the respondents are from upper middle- to high-income households. Over 27 percent earned \$36,000 or more in 1984, and nearly half earned \$25,000 or more. These income groups are also reflected in the occupations held by the respondents. Just under 29 percent are in professional or technical occupations and 10 percent are managers. The average 1984 household income of the total sample is \$24,096. The average household income of the Wilmington residents is \$18,448 and of the nonresidents is \$28,563.²

²The 1984 median household income for all of New Castle County (including Wilmington) was \$27,646 and for Wilmington alone it was \$16,447. The 1984 median household income for all of the survey respondents was about \$25,000; for the New Castle County respondents (excluding Wilmington) it was \$30,000 and for the Wilmington respondents alone it was \$16,000. The 1984 income figures for all New Castle County and Wilmington households are derived from the 1980 Census (updated by Consumer Price Index). Since income data from the census is continuous (respondents

Location of Residence and Work Place. There is an almost equal number of Wilmington residents and nonresidents in the sample (47 percent are residents and 54 percent are nonresidents). Over half (56 percent) of the Wilmington residents have lived in the city for 10 years or more. Two-thirds of the respondents work in the city and almost nine out of ten of the city workers work in the center city.

Shopping for Convenience Goods. About 40 percent of the survey respondents shop for convenience goods in the downtown at least once a week. Wilmington residents shop for these goods more often than nonresidents, and women are more frequent shoppers than men. Indeed, over 63 percent of those who shop for convenience goods in the downtown at least once a week are women.

When asked, "What convenience goods are needed in the downtown?" groceries received the most mentions, followed by variety goods that are found in department stores or five-and-dime stores, and hardware items.

Shopping for Clothing. About 11 percent of the respondents shop for clothing in the downtown at least once a week. Residents and nonresidents do not differ significantly in the frequency of their shopping for clothing, but among those who live in Wilming-

provide precise income) while the income data from the survey is categorical (respondents indicate the general range in which their income falls), comparisons are only approximate. It appears, however, that the pedestrian respondents are generally representative of both the Wilmington and New Castle Country populations.

ton, longer-term residents (over six years) shop for clothing in the downtown more frequently than residents who have lived there for shorter periods. Nonwhites shop for clothing in the downtown more frequently than whites, and those in clerical/sales positions shop for clothing there more frequently than people in other occupations.

Women significantly outpace men in their use of the downtown to shop for clothes. Nearly 86 percent of those who shop for clothing in the downtown at least once a week are women. It is not surprising, therefore, that women's clothing receives the largest number of mentions as the type of clothing that is needed in the downtown. This is followed by more stylish clothes, men's clothes, sports and casual clothes.

Shopping for Specialty Items. Just under one in five of the respondents (18 percent) shop for specialty items (gifts, books, records, furniture, etc.) in the downtown at least once a week. Wilmington residents shop for these items somewhat more frequently than nonresidents. It was also found that those interviewed before 11:30 a.m. were more frequent specialty item shoppers than those interviewed at other times of the day. Gifts, books, magazines, records/music were the items most frequently mentioned as needed in the downtown.

Use of Personal Services. Only 7 percent of the respondents use personal services in the downtown at least once a week. Residents and nonresidents do not differ significantly in the

frequency of their use of personal services in the downtown.

Patronage of Downtown Restaurants at Lunch Time. Fully 56 percent of the respondents eat lunch in a downtown restaurant at least once a week. Nonresidents are more frequent lunch-time customers than residents, as are those from high-income households and those in professional/technical or managerial occupations. Not surprisingly, about 80 percent of the respondents who are employed in the downtown eat lunch in a downtown restaurant at least once a week.

Patronage of Downtown Restaurants at Dinner Time. Just 9 percent of the respondents eat dinner in a downtown restaurant at least once a week. Residents are more frequent diners than nonresidents, as are those who are employed in or near the downtown and those who are in professional/technical or managerial occupations. Whites eat dinner in the downtown more often than nonwhites.

Coming to the Downtown for Entertainment. About 6 percent of the respondents come to the downtown at least once a week for entertainment. There are no significant differences among residents and nonresidents but among residents of Wilmington, those who have lived in the city for less than a year are more likely than longer-term residents to come to the downtown for entertainment at least several times a month. Length of residency may be related to age since the younger respondents, as a whole, come to the downtown for entertainment more often than older respon-

dents. Similarly, men come somewhat more frequently than women.

Shopping in the Evening. Willingness to shop in the downtown in the evening is an issue that seems to differentiate the respondents more than any other in the survey. There is almost a fifty-fifty split in the total sample, but by a two to one margin, Wilmington residents are more willing to shop in the evening than nonresidents. Among Wilmington residents, those living near the CBD and north of the Brandywine are more willing to evening shop than residents of the moderate- and upper middle-income neighborhoods in the northwestern and western sections of the city.

Willingness to evening shop is also related to income, occupation, race and age. Higher-income respondents, those in professional/technical occupations, whites, and older persons are less willing to evening shop than those from lower-income households, those in service/manual labor occupations, nonwhites, and people under the age of 25.

The reasons given most frequently for not wanting to evening shop in the downtown are distance from home, inconvenience, lack of safety, and inadequate bus transportation.

Watching Special Events on the Market Street Mall. Just over two thirds of the respondents watch the special events on the mall and another 19 percent say "sometimes." Wilmington residents, women, and nonwhites are the most frequent special event watch-

ers. Those who do not watch say they don't have time or they are not interested. The most popular types of special events are live music and dance performances.

Merchant Improvements in the Downtown. Fixing up the stores³ is the merchant action most frequently mentioned as needed in the downtown, followed by improving the quality of merchandise, and lowering prices (the latter two actions are particularly favored by Wilmington residents).

City Improvements in the Downtown. Respondents make 45 different suggestions about what the city should do to improve shopping in the downtown. The improvements receiving the most mentions are "clean up and fix the mall", "improve parking", "provide more security", and "develop more stores".

Personal Hobbies and Interests. Respondents cite 75 different personal hobbies and interests. The most popular activities are (in order of popularity): athletics and sports, reading, music, sewing and needlepoint, arts and crafts, photography, painting and art, travel, swimming and theater.

Conclusions and Recommendations

The results of the merchant and pedestrian surveys suggest both opportunities and limitations for retail, restaurant and service-

³This is a general category which includes fixing up the fronts as well as the facades.

based businesses in downtown Wilmington. The proportion of businesses--over 50 percent--that have been in operation for ten years or more is encouraging and indicates that a small business locating in the downtown has reasonable survival prospects. In addition, a healthy number of the respondents--again over 50 percent--say that sales trends over the past two years have been better than expected. Perhaps the most encouraging finding is that the representatives of the youngest firms are most likely to say that sales have been better than expected. Further, the majority of the merchant respondents perceive the downtown in positive terms. While no one is willing to say that it is "dynamic," the majority feel that it is improving and less than one in five sees the downtown as declining.

The pedestrian survey suggests that, at least during the day, there is a rather substantial consumer market in the downtown. The average household income of the persons interviewed is slightly over \$24,000 and nearly half of the respondents come from households with over \$25,000 in 1984 income. This is, to some extent, a captive market that is available through the entire year. The trick is to attract that market given the constraints on the time that people have to shop during the work day. There is certainly a healthy restaurant trade during the day with over 80 percent of the respondents who work in the downtown eating lunch in a downtown restaurant at least once a week. A business that combines eating with shopping, such as some of the bookstores on the West Coast that also sell prepared

gourmet foods and drinks, might work well in this environment. Another possibility is a specialty mall that combines high quality fast foods with small specialty retail shops as is found in Baltimore's Inner Harbor or New York's South Street Seaport. Of course, such a facility would have to fit the scale and preferences of the Wilmington market.

On the negative side, the pedestrian survey reveals a distinct split in the customer base of the downtown. When asked: "Would you shop in the downtown if the stores were open in the evening?," the respondents separated into two groups of about the same size. One group--with higher average household income, more members in professional/technical or managerial occupations, a higher proportion of whites and older persons, and more residents of areas outside of Wilmington or of the moderate- and upper middle-income neighborhoods of the northwest and west sections of the city--is unwilling to shop in the evening. The other group--with lower average household incomes, more members in service/manual labor occupations, a higher proportion of nonwhites and younger persons, and more residents of areas near the CBD or areas north of the Brandywine--would shop in the evening if the stores were open. Unfortunately the purchasing power of the second group may not be sufficient to justify the cost of longer hours for the businesses in the downtown. This constraint on the market available in the downtown is well understood by the merchants. When asked to rank eight alternative merchant actions to improve business in the downtown,

establishing evening hours, by a significant margin, is most frequently assessed as not at all important.

In addition to these general impressions of the possibilities and limitations of business development in downtown Wilmington, there are some more specific conclusions which can be derived from the responses to the surveys of merchants and pedestrians.

1. Residential development in the downtown is very limited as indicated by the fact that only 5 percent of the businesses have residential units in their buildings. An important way to overcome some of the constraints of the downtown market may be to encourage more residential use of upper floors in the downtown. The renovation of the Mullin's building at 6th and Market is an encouraging step in this direction.
2. Firms which provide services as well as retail opportunities seem to be doing fairly well. A recruitment effort to attract more firms of this type might be an effective way to strengthen the business climate in the downtown.
3. Both merchants and pedestrians say that the most important merchant action to improve the downtown is to fix up the stores. Furthermore, a substantial proportion of the merchants say they would be willing to remodel their facades if some form of financial assistance were available.
4. Merchants and pedestrians also agree about improving the quality of merchandise available in the downtown. If the relatively high-income daytime workers are to be attracted as patrons to downtown businesses, it is important that the merchants have merchandise available that suits their tastes.
5. A commodity that may have a good potential to increase sales in the downtown is women's clothing. The pedestrian survey reveals that women's clothing, particularly stylish clothing, is the type of clothing that a large number of respondents feel is needed in the downtown. In light of the fact that almost 90 percent of the weekly clothing shoppers are women, the downtown market for good quality women's clothing may be substantial.

6. Apparently there are quite a few convenience goods shoppers in the downtown. Indeed, of all the types of goods inquired about in the pedestrian survey, convenience goods is the commodity area with the highest proportion of weekly shoppers. When asked, "What convenience goods are needed in the downtown?" the most frequent answer is groceries. It might be worthwhile to explore whether a small franchise convenience store selling groceries and household variety goods would be a useful addition to the mall. This type of store recently opened on Main Street in Newark and seems to attract a good trade from students and University of Delaware employees.
7. The special events on the mall are quite popular with the pedestrians. Almost nine out of ten of the respondents watch them at least "sometimes." The most popular event is a music or dance performance. It must be said, however, that many merchants are somewhat ambivalent about these events. A majority of the merchant respondents do not feel that they are beneficial to business--indeed, some feel that the noontime events actually decrease business. Nevertheless, nearly two-thirds of the merchants want either more activities or the same amount but different types of activities. Given their popularity, the mall events attract people. In the long run, they are a useful mechanism to familiarize people with the resources available on the mall. Merchants who experience a short-term loss of business while people are watching an event should recognize that they may come back on another day to shop in their stores.
8. Only one respondent in ten coordinates his or her sales with Market Street Mall events. It is important that the merchants and the city cooperate in the development and implementation of the Mall events so that these events work more effectively to improve shopping in the downtown.
9. A good deal of interest is expressed by the merchants in seminars on advertising, customer relations/sales, merchandising, and security. Unfortunately, the most interest is expressed by merchants whose sales have been better than expected. Given the interest, DWIC should look into offering these seminars as part of its program and should promote them among all of the merchants but particularly among those merchants who are less interested but may need them more.
10. The results of the merchant survey raise some concerns about downtown restaurants. Respondents representing restaurants are the least positive about sales trends

over the past two years, the most negative about development in the downtown, and the most concerned about security issues. It may be that restaurants are more vulnerable than other types of business in the downtown. They have a strong lunchtime trade (80 percent of the respondents eat lunch in a downtown restaurant at least once week) but the evening trade is less certain (only 9 percent of the respondents eat dinner in the downtown at least once a week). Because of the need to stay open in the evening, they are also more sensitive about security issues. It is possible that restaurants were more immediately affected by the move of the Hercules Corporation to the Brandywine Gateway and, therefore, they are now more concerned about the impact of any development on their businesses. These issues are not explored in a precise way in the written questionnaire. They should be examined in more detail by DWIC, perhaps through a series of conversations with restaurant owners and managers.

11. Interviewers working on Saturday encountered a number of people who indicated that they were tourists. They were not included in the survey because tourists represent a special category of shoppers that the survey was not designed to handle. Further investigation should be made of the potential for a tourist market in the downtown. It may be worthwhile for DWIC to obtain information about conventions at the downtown hotels which can be distributed by DWIC to stores and restaurants.

CHAPTER ONE

MERCHANT SURVEY

During November 1984, a questionnaire was distributed to 158 businesses located in downtown Wilmington. The purpose of the survey was to develop an overall understanding of the characteristics of businesses in the downtown as well as business trends and practices. The survey was also designed to determine merchant attitudes towards advertising and promotion, transportation and parking, security, Mall maintenance and improvement and other issues. The area surveyed included Market Street between 2nd and 10th Streets, 9th Street between Market and Tatall, and adjacent side streets. A total of 67 questionnaires (42 percent) were returned and tabulated. This section summarizes the results of the survey.

Methodology. Questionnaires were distributed to all of the businesses located on or adjacent to the Market Street Mall. An effort was made to obtain a sufficient number of responses so that the tabulated sample would be representative of the businesses in the downtown. Responses were coded and tabulated by staff members of the College of Urban Affairs and Public Policy.

In addition to determining how the respondents as a whole replied to the individual questions in the survey, the response patterns of selected subgroups were examined for some of the questions. Responses were analyzed in terms of type of business (food, retail or service), location in the downtown (lower Market Street

Mall, upper Market Street Mall, 9th Street Mall, or other areas such as Orange Street), sales trend (better than, same as, or worse than expected), and image of the downtown (improving, staying the same, or deteriorating).¹ The most interesting relationships are identified in the following narrative.

I. BASIC INFORMATION

Question 1: What is the name of your business?

No tabulation.

Question 2: What is its address?

Respondents are divided into four groups. Just over 22 percent of the respondents are located on lower Market Street (600 block and below), 36 percent on upper Market Street (700 block and above), 24 percent on 9th Street, and 8 percent on adjacent streets (Orange Street and side streets).

Question 3: What type of business is this?

Respondents are divided into three groups. Fully 58 percent are retail stores, 25 percent are sales and service outlets, and 16 percent are food establishments.

¹Detailed information on the frequency of responses to questions in the merchant survey is contained in Appendix A which has been submitted to DWIC under separate cover.

Question 4: Is this an independent firm, or is it a chain or branch store?

Nearly 81 percent of the businesses are independent and almost 19 percent are chain or branch stores. The highest proportion of independents is found on 9th Street (94 percent) and the lowest is on upper Market Street (53 percent).

Question 5: How long has this business been located in Wilmington?

About 13 percent of the responding businesses have been located in Wilmington for three years or less. Another 33 percent have been in Wilmington for three to ten years, and 54 percent have been there for ten years or more. Thus, nearly nine out of ten of the responding businesses are well established with at least three years of operation.

Question 6: How long has this businesses been at its present location?

Just over 28 percent of the responding businesses have been at their present location for three years or less. About 34 percent have been there for three to ten years, and 37 percent have been there for ten years or more. It appears that the majority of the businesses surveyed initially established in Wilmington at their present location.

In downtown Wilmington, service establishments are more likely to be relatively new--that is, less than three years old--than retail or food-related businesses (42 percent as compared to 26 percent and 18 percent).

Question 7: How many persons are employed by this businesses?

Most of the businesses in the downtown are relatively small. Almost 57 percent have five employees or less. About 24 percent have six to ten employees, and 19 percent have 11 employees or more.

Question 8: What is the amount of space (in square feet) currently occupied by this business?

The small size of most of the downtown businesses is also reflected in the amount of space occupied. Nearly one-third (33 percent) occupy less than 1,000 square feet of space. About 40 percent occupy from 1,000 to 3,000 square feet. These figures are only rough approximations. An examination of the responses indicates that many respondents did not provide an accurate estimation of the amount of space occupied by their business. They provided total floor space which included storage and other ancillary uses, and thus tended to overstate the square footage actually utilized by the business operations. It appears that restaurants and other food establishments tend to be larger (over 3,000 square feet) than retail and service businesses.

Respondents were also asked to indicate how many floors are occupied by their business. Almost 53 percent occupy only one floor, 42 percent occupy two floors, and just over 5 percent occupy three or more floors.

Question 9: Do other businesses occupy upper floors in the building?

Nearly one-third of the respondents (33 percent) say that other businesses occupy upper floors in their building.

Question 10: Are there any occupied residential units in the building?

Only 5 percent of the respondents say that there are occupied residential units in their building. This may indicate that there is a possibility for the development of additional residential units in the downtown.

Question 11: Do you rent or own the building?

About 30 percent of the responding businesses own their building, while 68 percent are renters. One business (2 percent) both owns and rents portions of its facility.

Question 12: What is your current monthly base rent?

Among the renters, 13 percent pay \$600 dollars or less per month, 36 percent pay from \$600 to \$1,000 dollars per month, 32 percent pay from \$1,000 to \$1,400 per month, and 19 percent pay \$1,400 or more per month.

Question 13: Do you also pay a percentage rent on your gross income or sales?

Only 2 respondents (3 percent) pay a percentage rent on their gross income or sales.

Question 14: Does your lease require you to pay any additional charges?

One-quarter (25 percent) of the respondents pay real estate taxes, one quarter pay for building maintenance and/or improvements, and nearly 60 percent pay for utilities.

Question 15: Where is the building's owner or agent located?

Among the renters, only one respondent indicates that the building owner or agent is located outside of Wilmington.

Question 16: How frequently do you communicate with the building owner or agent?

Almost 42 percent of the respondents communicate with the building owner or agent monthly or more often, 23 percent communicate every couple of months, 30 percent communicate two or three times a year, and only 5 percent communicate just once a year.

When asked about the attitude of the building owner or agent, 60 percent of the respondents say that his or her attitude is cooperative, 21 percent say that he or she is willing to listen but slow to act, 14 percent say that he or she is indifferent, and only 5 percent say that he or she is highly resistant.

II. BUSINESS TRENDS AND PRACTICES

Question 17: What has been the trend in sales growth for your business over the last two years?

Approximately 14 percent of the respondents say that their sales growth over the last two years has been much better than expected, 37 percent say that it has been somewhat better than expected, 29 percent say that there has not been much change, 13 percent say that it has been somewhat worse than expected, and only 8 percent say that it has been much worse than expected. Thus, over 50 percent of the businesses have had positive sales trends (somewhat better or much better than expected) and about 20 percent have had negative sales trends (somewhat worse or much worse than expected).

In terms of expectations, the service firms seem to be doing better than the retail and food businesses. Nearly 65 percent of the respondents from service firms say they are doing much better or somewhat better than expected over the last two years as compared to 44 percent of the retail businesses and only 36 percent of the restaurants and other food establishments. Respondents from the Lower Market Street area are also significantly less positive about sales over the past two years. Only 20 percent say that sales have been better than expected. The youngest firms are more likely to say that they are doing better than expected. Just over 63 percent of the respondents from firms that are three years old or less say their sales are somewhat or much better than expected.

Question 18: Please rank the following factors in terms of their impact on your sales growth over the last two years as "1" (positive impact), "2" (little or no impact), or "3" (negative impact).

Among 11 factors, changes in merchandising by the business (average score, 1.53)² and changes in the general economy (1.64) are most frequently identified as having a positive impact on sales growth. These are followed by advertising and promotion by the business (1.71), changes in police protection (1.75), real estate development along the Market Street Mall (1.84), and maintenance and improvement along the Mall (1.89). The factors that are identified somewhat more frequently as having little or no impact or a negative impact are changes in the availability of bus transportation (2.13) and changes in customer base (2.13). The factors that are identified most frequently as having a negative impact on sales growth are advertising and promotion by other groups (2.21), changes in the availability of parking (2.26), and competition from other businesses (2.27).

Respondents representing businesses with better than expected sales trends over the last two years are more likely to say that certain factors have had a positive impact on these trends.

²The average score for each of these factors was calculated by multiplying the number of "1" responses by 1, the number of "2" responses by 2, and the number of "3" responses by 3. The result was divided by the total number of responses. This tabulation provided an "average score." The same procedure was adopted for all the questions in the survey which used this format.

These include changes in the general economy and advertising and promotion by the individual businesses. Respondents representing businesses with worse than expected sales trends over the last two years are more likely to say that certain factors have had a negative impact on these trends. These include changes in the general economy, the availability of bus transportation, real estate development along the mall, competition from other businesses, and changes in the customer base.

The various types of businesses do not seem to differ significantly in their evaluation of the impact of the above factors, except that restaurants and other food-related businesses are more likely to indicate that changes in customer base have had a positive impact on their sales growth (46 percent indicating a positive impact as compared to only 15 percent of retail outlets and 6 percent of service businesses). Restaurants are also more likely to say that changes in merchandising have had a positive impact (73 percent vs. 46 percent for retail and 24 percent for service).

In terms of location, respondents from the lower Market Street area are less positive about the impact of mall improvements, the impact of the general economy, and the impact of competition from other businesses. They are more positive about the impact of changes in bus transportation and the impact of real estate developments. Respondents from the upper Market Street area are less positive about the impact of parking changes. Those from

the 9th Street area are less positive about the impact of changes in the customer base and changes in merchandising (upper Market Street respondents are very positive about changes in merchandising).

Respondents who view the downtown as improving tend to evaluate more positively the impact of a number of factors on sales trends. Mall maintenance and improvement along the mall, changes in the general economy, advertising and promotion by the individual business, and real estate development along the mall are more often perceived as having a positive impact on sales trends by those who see the downtown as improving as compared to those who see the downtown as staying the same or declining.

Question 19: What hours are you normally open for business?

About 5 percent of the respondents say their businesses are open less than 30 hours during the week, 9 percent are open from 30 to 40 hours, 54 percent are open 40 to 50 hours, 24 percent are open 50 to 60 hours, and 9 percent are open 60 hours or more. The percentage of businesses open eight hours or more on a particular day ranges from 39 percent on Monday to 48 percent on Friday. On Saturday, only 22 percent of the businesses are open eight hours or more.

Question 20: Which is usually your most active business day and which is your slowest? Use a scale of 1 through 6 with "1" being most active.

By a substantial margin, Friday is the most active business day (average score is 1.95), followed by Thursday (2.90), Wednesday

(3.14), and Monday (3.16). Tuesday is the slowest weekday (3.90). Not surprisingly, Saturday is the slowest day of the week (4.04).

Question 21: What are your busiest hours during the week (Monday through Friday)?

Just over 82 percent of the respondents say that 11 A.M. to 1 P.M. are the busiest hours during the week.

Question 22: What should merchants be doing to improve business downtown? Please rank the following actions as "1" (very important), "2" (somewhat important), or "3" (not at all important).

Among eight alternative actions, fixing up storefronts is most frequently chosen as a very important action by the merchants to improve the downtown (average score is 1.44), followed by improving the quality of merchandise (1.50), coordinating sales and promotions (1.54), improving customer relations (1.58), renovating store interiors (1.63), doing more advertising (1.67), and improving window displays (1.72). Establishing evening hours, by a significant margin, is most frequently chosen as not at all important (2.13).

Respondents representing businesses with worse than expected sales trends are more likely than others to stress the importance of improving the quality of merchandise and doing more advertising.

The respondents representing restaurants are consistently more likely to say that a merchant action is very important to improve

business in the downtown. With the exception of renovating store interiors, the percentage of respondents choosing the very important ranking is higher on all items for food-related businesses than for respondents representing the retail and service area. Since this group has a more negative perception of sales growth over the past two years, they may be more concerned about taking steps to improve business in the downtown.

Respondents from the lower Market Street area are less likely to feel that improving merchandise, improving customer relations, or renovating store interiors are very important actions for merchants to take to improve business. Upper Market Street merchants are less likely to see the importance of improving window displays. Respondents from 9th Street are less likely to feel that fixing up storefronts is important.

Respondents who perceive the downtown area as declining are more likely to say that the merchant actions are very important to improve business. For each of the eight merchant actions listed in the questionnaire, the percentage of respondents with negative images of the downtown who rate the action as very important is significantly higher than for the respondents with more positive images.

III. ADVERTISING AND PROMOTION

Question 23: Which of the following advertising media do you use currently? Please rate the media as "1" (very effective), "2" (somewhat effective), or "3" (not at all effective).

Among five media choices, the News Journal is used by the largest percentage of respondents (46 percent), followed by direct mail (36 percent), radio (30 percent), and fliers or handbills (24 percent). Television is used by less than 8 percent of the respondents.

In terms of effectiveness, direct mail receives the best rating (average score is 1.60), followed by the News Journal (1.80), radio (1.80), and fliers or handbills (2.06). The effectiveness rating of television is 2.27.

Question 24: Do you agree or disagree with the following statement? "Market Street Mall events and activities in general have no beneficial impact on my business."

Nearly 55 percent of the respondents agree that mall events have no beneficial impact on their business. Approximately 26 percent disagree, and 20 percent say that they do not know. Nine out of ten of the respondents who perceive the downtown area as declining feel that mall events have no beneficial impact on business. Nearly 70 percent of the respondents representing businesses with worse than expected sales trends over the last two years also agree that Mall activities have no beneficial impact.

Question 25: Which event or activity seemed to produce the largest increase in your business?

Only a third of the respondents identify events that seemed to increase their business. These include parades (7 responses), large organized events (7), sidewalk sales (6), seasonal events (3), and pay day (1).

Question 26: Which events seem to produce the largest decrease?

Among the 25 respondents who identify events that seemed to produce a decrease in business, 15 cite noon-time activities. Other events receiving mention include seasonal events (4), parades (3), and Rodney Square events (3).

Question 27: Would you like to see more activities along the Market Street Mall?

Although 55 percent of the respondents say that mall events are not beneficial to their business (Question 24), 59 percent say they would like to see more activities along the mall. An additional 13 percent say they would like to see the same amount but different events. Only 39 percent of the respondents representing businesses with worse than expected sales trends would like to see more activities.

Question 28: If yes (to Question 27), what kind of activities would you like to see more of on the Market Street Mall? Please rank the activities below as "1" (very important), "2" (somewhat important), or "3" (not at all important).

Among the seven activities listed on the questionnaire, sidewalk sales/dollar days are most frequently cited as very important (1.4), followed by arts and crafts fair (1.6), and music events

(1.7). Charity promotions (2.2), seasonal events (2.3), and company product displays (2.3) fall in the middle of the rating scale. Vending (2.6) and a foot race (2.6) are the least popular of the seven choices.

Question 29: Do you coordinate your sales with Market Street Mall events or activities?

Only 11 percent of the respondents say they coordinate their sales with mall events. Almost 36 percent say "sometimes." None of the 9th Street merchants coordinate their sales with mall events.

Question 30: Do you hold your own sidewalk sales?

Just over a third (37 percent) of the businesses responding to this question hold their own sidewalk sales. Not surprisingly, retail businesses are more likely to hold their own sidewalk sales (41 percent) as compared to service outlets (29 percent) and food establishments (18 percent). Nearly two-thirds of the 9th Street merchants hold their own sidewalk sales as compared to only 20 percent of the lower Market Street merchants.

Question 31: Please list the types of stores, goods, and/or services you think are needed in the downtown area to increase business and shopper traffic.

A large department store receives the greatest number (33) of responses, followed by a hardware store (19), women's clothing store (13), boutiques (12), a movie theatre (10), "quality or expensive" stores (7), a toy store (6), and fast food shops (5). Receiving three responses each are an appliance store, enter-

tainment facilities, and a grocery store. Receiving two responses each are a kitchen/gourmet shop, a record/video store, a late-night food shop, and a sporting goods store. A newsstand, an indoor mall, and a cab/mini-bus service each receive one response.

Question 32: What is your image of the downtown in general?

While none of the respondents say that they have an image of the downtown as "dynamic," nearly 51 percent say that it is "improving." One-third (33 percent) say that it is "staying about the same." Only 14 percent say it is "on the decline," and 3 percent say that it is "terrible."

Consistent with their more frequent perception that the sales growth of their business has been better than expected over the last two years, respondents representing service firms are also more likely to perceive the downtown as improving (71 percent for service firms as compared to only 46 percent for food establishments and 41 percent for retail stores). Merchants on upper Market Street are the most likely to see the city improving (63 percent) and those on 9th Street are the least likely (25 percent).

IV. TRANSPORTATION AND PARKING

Question 34: Where do your customers park?

Just over 27 percent of the respondents say their customers park in lots, 19 percent say they park on the street, 15 percent say they park illegally (in loading zones, for example), and 40 percent indicate some combination of these answers.

Question 35: Do you feel customer parking is adequate?

Nearly 70 percent of the respondents say parking for their customers is not adequate, while 6 percent say they do not know. Respondents representing food establishments are much more likely to say that parking is adequate as compared to respondents representing service or retail establishments (64 percent vs. 24 percent and 13 percent). The merchants on 9th Street are the most likely to feel that parking is inadequate (75 percent) and those on lower Market Street are the least likely (60 percent).

Question 36: If parking is not adequate, where do you envision additional parking?

Forty of the respondents do not answer the question. More high-rise garages or parking lots is mentioned ten times. Other responses include "anywhere close to downtown (6)," "on Shipley or King (5)," "on Market Street (3)," "addition to 9th and Shipley garage (2)," and "cancel all monthly parking (1)."

Question 37: Do you think the downtown area needs: (respondents were asked to check one or more of five alternative solutions to the parking problem).

More time on street meters is the most frequently chosen solution (76 percent), followed by more garages below 8th Street (46 percent), more garages above 8th Street (45 percent), more metered areas on the street (36 percent), and less metered areas on the street (27 percent).

The alternative favored by a respondent has a great deal to do with location. Lower Market Street merchants do not want it above 8th Street. The 9th Street merchants do not want it below 8th Street. Many 9th Street merchants (63 percent) want more metered areas on the street, but lower Market Street merchants do not (only 7 percent want more metered areas). Upper Market Street merchants are more likely to want more time on meters.

Question 38: Do you advertise the availability of parking downtown (e.g., guaranteed parking at the Radisson, reduced parking rates in the evening)?

Only 21 percent of the respondents indicate that they advertise the availability of parking downtown.

Question 39: Do you take advantage of the validated parking program?

Just under 30 percent of the respondents say they take advantage of the validated parking program.

Question 40: Please indicate why you do or do not take advantage of the validated parking program.

The reason for taking advantage of the validated parking program that is most frequently mentioned is that customers want it or it is good public relations (17 responses). Two persons say that it is the only parking available.

On the negative side, 17 respondents say that the program is not useful or there is not enough demand. The second most frequently mentioned reason for not taking advantage of the program is lack of awareness of it (12 responses). Other reasons for not taking advantage of the program include "it is too expensive (4)," "it is against company policy (3)," "I am not interested (1)," and "I pay for customer's parking on request (1)."

Question 41: Do you think that a Park-and-Ride program operated by DART would be useful in bringing customers downtown?

Just over 42 percent of the respondents feel that a Park-and-Ride program would help to bring customers downtown. Another 25 percent say they do not know.

V. SECURITY

Question 42: Please rank the following security problems in the downtown as "1" (very serious), "2" (somewhat serious), or "3" (not at all serious).

The questionnaire listed ten security problems. Shoplifting (1.53) and loitering (1.56) are cited most frequently as very serious problems, followed by inadequate police protection

(1.81), vandalism (1.89), street robberies (1.96), teenagers harassing customers (1.99), and poor lighting (2.00). The problems that are less frequently mentioned as serious include stores closed at night (2.14), noise (2.29), and employee theft (2.53).

Respondents representing businesses with worse than expected sales trends over the last two years are more likely than other respondents to say that certain security problems are very serious. These include shoplifting, employee theft, and teenager harassment of customers.

Except for shoplifting and street robberies--problem areas that are of a greater concern to respondents representing retail stores--the respondents representing restaurants and other food-related businesses are consistently more likely to identify the security problems as very serious, particularly teenager harassment and loitering. Perhaps this perspective is derived from the fact that restaurants are more likely to be open in the evening and/or from the poorer evaluation of sales trends over the past two years.

For those on lower Market Street, the most serious security problems are shoplifting, teenager harassment of customers, inadequate police protection, and closed stores at night. Loitering is the problem that most concerns merchants on upper Market Street. Except for street robberies, 9th Street merchants are notably less concerned about security problems than merchants

at other locations. Lower Market Street merchants are the least concerned about street robberies.

VI. CAPITAL IMPROVEMENTS/MALL MAINTENANCE

Question 43: Do you think that the present design of the Market Street Mall encourages shopping in your store?

Only 22 percent of the respondents answer in the affirmative to this question. About 22 percent say they do not know, and the rest (57 percent) say that the present design of the mall does not encourage shopping in their store. Merchants on upper Market Street are the most likely to feel that the design of the mall encourages shopping in their stores (33 percent).

Question 44: Please evaluate the following features of the design of the Market Street Mall as "1" (very pleasing), "2" (somewhat pleasing), "3" (neither pleasing nor displeasing), "4" (somewhat displeasing), or "5" (very displeasing).

The features of the mall which receive the most mentions as very pleasing are the plants (1.51) and trees (1.59), followed by benches (2.18) and lights (2.28). The center aisle (2.44), flag poles (2.67), and trash receptacles (2.75) fall in the middle of the rating scale. Signs (2.91) and, by a significant margin, kiosks (3.52) receive the most mentions as somewhat or very displeasing. With the exception of flag poles, the respondents representing restaurants are consistently more negative than the others about all of the design features of the mall.

There is also a relationship between a respondent's image of the

downtown and his or her evaluation of the design features of the mall. Those with more negative images of the downtown are less likely to rate a design feature as pleasing or very pleasing. For example, 90 percent of those who perceive the downtown as improving rate the plants on the mall as pleasing or very pleasing as compared to 81 percent of those who feel the downtown is staying the same and only 50 percent of those who think that it is declining. Except for trees, this rating pattern is found with all of the features listed in the questionnaire.

Question 45: Do you have a problem with truck deliveries to your store?

Just under 58 percent of the respondents say that they do not have a problem with truck deliveries. Restaurants appear to be having the most problems (55 percent) and service firms the least (only 18 percent). Businesses on upper Market Street have the most problems with truck deliveries (51 percent), while those on lower Market Street (27 percent) have the least.

Question 46: Can truck deliveries be made at the rear of your business?

Approximately 64 percent of the respondents say that truck deliveries cannot be made at the rear of their business. The problem is most severe on 9th Street, where truck deliveries cannot be made at the rear of 75 percent of the businesses, and least severe on upper Market Street, where only 46 percent of the businesses cannot receive truck deliveries at the rear.

Question 47: Would you say that trash collections are: very adequate, somewhat adequate, or not at all adequate?

Twenty percent of the respondents say that trash collections are very adequate, and 63 percent say they are somewhat adequate. Only 16 percent say they are not at all adequate.

Question 48: Would you like the entrance of your business (the area between your front door and the sidewalk) to be cleared by the mall attendant twice every week?

Over 69 percent of the respondents say they would like the front of their business cleared by the mall attendant twice every week.

Question 49: Would you be willing to pay five dollars per week for the service?

While nearly 70 percent of the respondents say they would like the front entrance of their business cleared by the mall attendant, only 20 percent are willing to pay five dollars per week for the service.

Question 50: What do you think are the best ways to deal with the vacant storefronts on the Market Street Mall? Please rate the options below as: "1" (very helpful), "2" (somewhat helpful), or "3" (not at all helpful).

The most popular approach to the vacant storefront problem is to set up exhibitions by artists (1.56), followed by allowing other merchants to display merchandise (1.74) and encouraging community groups to set up window displays (1.78). The least popular choice is to pressure the property owner to board up the store (2.71). Except for the idea of pressuring the property owners to board up their stores, respondents representing businesses with

better than expected sales over the last two years tend to be more positive than the other respondents to these approaches to solving the vacant storefront problem.

The only effect of location on the responses to this question is that 9th Street merchants are much more likely to favor allowing merchants to display merchandise than the merchants from other areas. Merchants from lower Market Street are much less likely to favor artist exhibitions.

Question 51: Would you or the owner of your store be willing to remodel the facade of your building if there were some financial assistance available?

Almost a third (32 percent) of the respondents say "yes" they or the owner would be willing to remodel if financial assistance were available, 25 percent say "maybe," and 15 percent say "don't know." Only 28 percent would not be willing to remodel.

VII. GENERAL

Question 52: Would you attend seminars on any of the following topics?

Between 56 and 59 percent of the respondents would attend one or more of the seminars specified in the questionnaire: merchandising techniques, advertising and promotion, security, and customer relations/sales. Those representing service firms are consistently less likely to indicate that they would attend one or more of these seminars than those representing other types of businesses. Those representing food establishments seem to be

the most positive toward the seminars.

Respondents representing businesses with better than expected sales trends over the past two years are the most willing to attend these seminars, and they are followed by respondents representing businesses with worse than expected sales trends. The least interested are those who say that sales have been about what they expected. The merchants on 9th Street express the greatest willingness to attend all of the seminars.

Question 53: Would a day-care facility on the mall be beneficial to your business?

Only 17 percent of the respondents say that a day-care facility on the mall would be beneficial to their business, and 30 percent say they do not know. A majority (53 percent) do not feel that such a facility would be beneficial.

Question 54: Please indicate the impact that development in the areas listed below will have on your business as: "1" (positive impact), "2" (little or no impact), or "3" (negative impact).

Development in the Christina Gateway above Wilmington Boulevard is most frequently mentioned as having a positive impact on businesses (1.63), followed by development in the Delaware Avenue/Jefferson Street area. Development along the Christina River (1.94) and in the Brandywine Gateway (2.12) is less popular.

Representatives of restaurants are generally more negative toward development than the others, particularly with respect to

development in the Delaware Avenue/Jefferson Street area and in the Brandywine Gateway. Those representing service firms are consistently more positive toward development in all of the areas.

Attitudes on the impact of development are directly related to location. The farther away the development, the less likely it is that a merchant will be favorably disposed. Thus, lower Market Street merchants are the least favorable to development in the Delaware Avenue/Jefferson Street area and in the Brandywine Gateway. The merchants on 9th Street are the least favorable to development in the Christina Gateway above Wilmington Boulevard and along the Christina River. As upper Market Street is in a central location, merchant views there tend to fall between those from lower Market Street and those on 9th Street except they are the most positive toward development in the Brandywine Gateway.

Attitudes toward the impact of development are also related to a respondent's image of the downtown. Those with more positive views are more likely to rate the impact of development in a particular area as positive. Thus, 30 percent of those who see the downtown as improving rate development in the Delaware Avenue/Jefferson Street area as having a positive impact on business as compared to 28 percent of those who feel the downtown is staying the same and 20 percent of those who think it is declining. Development along the Christina River will have a positive impact according to 27 percent of those with positive images of the

downtown, but only 14 percent of those who feel the downtown is staying the same and 10 percent of those who feel it is declining share this view. The pattern is similar for attitudes toward development in the Christina Gateway and in the Brandywine Gateway.

CHAPTER TWO

PEDESTRIAN SURVEY

In February 1985, a survey of pedestrians was conducted in three locations in downtown Wilmington: at 4th and Market, at 8th and Market and on 9th Street between Market and Tatnall. A total of 282 people were interviewed to determine how frequently pedestrians shop for various items in the downtown, to identify their income, occupational, residential, racial, age and gender characteristics, and to find out how they feel the downtown can be improved as a shopping center.

Methodology. Graduate students from the College of Urban Affairs and Public Policy interviewed pedestrians on specified days, times, and places. An interview protocol was established so that the resulting sample of respondents would fairly represent pedestrian traffic in downtown Wilmington. More interviews were obtained on Friday, a busy day, than on Tuesday, a slow weekday, or on Saturday. Interviews were also obtained in the morning (before 11:30), during the lunch period, and in the afternoon (after 2:00)--also in proportion to the estimated flow of traffic. The chart below indicates the number of interviews obtained at various locations, at particular times, and on different days.¹

¹Some differences were found in the types of people interviewed at the various locations. The proportion of whites interviewed on 9th Street was greater than their proportion in the total sample, about equal to the sample on upper Market Street, and less than the sample on lower Market Street. In the

<u>Location</u>	<u>Number</u>	<u>Percent</u>
9th Street Mall	115	41
8th and Market	108	38
4th and Market	55	19
Missing data ²	4	2
 <u>Day of Interview</u>		
Friday	127	45
Saturday	50	18
Tuesday	102	35
Missing data	3	2
 <u>Time of Interview</u>		
Before 11:30 a.m.	75	26
11:30 a.m. to 2:00 p.m.	155	55
After 2:00 p.m.	45	16
Missing data	7	3

The responses were coded and tabulated by staff members of the College of Urban Affairs and Public Policy. This section presents the results of the survey and includes information about how the respondents as a whole replied to the questions in the survey.³ Individual questions were also analyzed to determine whether factors such as gender, income, occupation, race, age, and location of residence or work place influence the response

case of occupation groups, the proportion of managers interviewed on 9th Street was higher than their proportion in the total sample. On upper Market Street, the proportion of persons in services/manual labor was higher. On lower Market Street, the proportion of persons in professional/technical and managerial occupations was lower, while the proportion in skilled occupations as well as those who are unemployed/housewives was higher.

²Data that was not recorded or was illegible on the interview form.

³Detailed information on the frequency of responses to questions in the pedestrian survey is contained in Appendix B which has been submitted to DWIC under separate cover.

patterns. Significant findings are identified in the following narrative.

Characteristics of the Sample. In addition to the location, day and time of the interview, interviewers recorded the race, gender and age of each respondent. The sample contains almost equal numbers of males and females--52 percent of the respondents are female and 48 percent are male. About three-quarters (75 percent) are white, and one-quarter (25 percent) are non-white. Ages were estimated by the interviewer. As expected, younger and older persons are under-represented in the sample since these groups are less likely to be employed and on the Mall during the day. Only 6 percent of the respondents are under 25, 37 percent are between 25 and 34, 46 percent are between 35 and 54, and 11 percent are 55 and older.

At the conclusion of the interview, respondents were given a piece of paper and asked to circle the category that represented the income of their household during 1984 and to place the paper in an envelope. This element of confidentiality helped to achieve a very low rate of refusal to answer the income question (only 15 percent). The resulting tabulation shows a substantial number of persons from upper middle- to high-income households in the pedestrian sample. The table below (adjusted for the non-responses) depicts the income distribution found in the sample:

<u>Income Category</u>	<u>Percent</u>
Less than \$6,000	12.1
\$6,000 to \$11,999	14.6
\$12,000 to \$17,999	12.1
\$18,000 to \$24,999	12.5
\$25,000 to \$35,999	21.7
\$36,000 and over	27.1

Respondents were also asked to specify their occupation. Just under 29 percent are in professional or technical occupations, 10 percent are managers, 22 percent are in clerical or sales positions, 8 percent are skilled laborers, 12 percent are in service-related occupations, just under 2 percent are manual laborers, and 17 percent are unemployed or are housewives. The following table shows the average household income of the occupation groups in the sample as well as the average household income of Wilmington residents and nonresidents and of the total sample of pedestrians.

<u>Occupation Group</u>	<u>Average Income</u>
Managers	\$34,063
Professional/Technical	33,882
Skilled Labor	20,125
Housewives/Unemployed	18,342
Clerical/Sales	17,943
Services/Manual Laborer	14,409
Wilmington Residents	18,448
Nonresidents	28,563
Total Sample	\$24,096

Question 1: Do you live within the City of Wilmington?

Just over 47 percent of the respondents live in Wilmington and 54 percent live outside the city. Of those who live in the city, 11

percent have lived there for less than a year, 22 percent for two to five years, 12 percent for six to ten years, 25 percent for eleven to twenty years, and 31 percent for over twenty years.

Wilmington residents were divided into five groups in relation to the distance of their home from the CBD. These groups were designated as the Center City, which includes the CBD, an Inner Core, an Outer Core, the Far North, and the Far West.⁴ Among the Wilmington residents, just 9 percent live in the Center City, 20 percent in the Inner Core, 36 percent in the Outer Core, 13 percent in the Far North, and 22 percent in the Far West.

Respondents who do not reside in the city were divided into 7 groups as determined by the zip code of their home address. About 26 percent of the nonresidents live North of the Brandywine, 20 percent live South of the Brandywine, 20 percent live South of Wilmington, 18 percent live West of Wilmington, 6 percent live in Chester County, 5 percent live in Philadelphia and its suburbs, and 5 percent live in other parts of Delaware, Maryland and New Jersey.⁵

⁴Distance from the CBD was approximated since census tract boundaries were used as to locate residences. Tracts 1 and 10 were defined as the Center City; 9,16,17,20 and 21 as the Inner Core; 4,5,8,11,15,19,22,26,27, and 6.02 as the Outer Core; 2,3,6.01, and 7 as the Far North; and 12,13,14,23,24, and 25 as the Far West.

⁵"North of the Brandywine" includes areas outside of the city and north of the river. "South of the Brandywine" includes areas south of the Brandywine River, north of the Christiana River, and west to Barley Mill Road. "South of Wilmington" includes Christiana, and areas east of the Kirkwood Highway and south to Red Lion. "West of Wilmington" includes Yorklyn,

Question 2: Is the place where you work in the City?

Two-thirds of the respondents (67 percent) work in the city, 14 percent work outside the city, and 19 percent are unemployed or housewives. The area definitions used for residential location were also applied to work place location. The work place of fully 86 percent of the respondents who work in Wilmington is in the Center City. The remaining work places are spread about evenly among the other city areas. Among the 34 respondents who work outside the city (and who provided work place location), about half work either North of the Brandywine or South of the Brandywine.

Question 3: I am going to read you a list of goods and services. Would you tell me how often you shop or use these services in the downtown? Let's start with convenience goods--like drugs or toiletries. How often do you shop for these items in the downtown? Is it almost daily, once a week, one to three times a month, seldom, or never?

Nearly 19 percent of the respondents shop for convenience goods in the downtown almost daily. Just over 21 percent shop for these items once a week, 27 percent shop for them from one to three times a month, 20 percent seldom shop for them, and 13 percent never shop for them in the downtown. Wilmington residents shop for convenience goods in the downtown somewhat more frequently than nonresidents--46 percent shop once a week or more for these goods as compared to 35 percent of nonresidents. Women shop for convenience goods more often than men. Indeed, over 63

Newark, and south to Ogletown.

percent of those who shop for convenience goods at least once a week in the downtown are women.

When asked, "What convenience goods would you like to see more of in the downtown?" groceries receive the largest number of mentions (35), followed by department store (15), five-and-dime store (6), hardware (6), dry goods (5), and medicines/drugs (5).⁶

Question 4: How often do you shop in the downtown for clothing?

Only 3 percent of the respondents shop for clothing in the downtown almost daily, 8 percent shop once a week, 28 percent shop from one to three times a month, 38 percent seldom shop for clothing, and 24 percent never shop for clothing in the downtown. Residents and nonresidents do not seem to differ significantly in the frequency of shopping in the downtown for clothing, but among Wilmington residents, those who have lived in the city for more than six years are more frequent shoppers for clothing than those who have lived there for shorter periods. In addition, nonwhites are more frequent shoppers for clothing than whites--50 percent of the nonwhite respondents shop for clothing in the downtown at least once a month as compared to about 33 percent of the whites. It also appears that, among the occupational categories, respondents who are in clerical/sales are the most frequent downtown shoppers for clothing.

⁶ Respondents mentioned nearly 30 other types of goods or stores, some of which could not be classified as convenience items (such as fast food restaurants or shoes for children).

Women are much more frequent shoppers for clothing in the downtown than men. Nearly 86 percent of those who shop for clothing at least once a week are women. Women's clothing receives the largest number of responses (32) to the question **"What types of clothing would you like to see more of in the downtown?"** This is followed by good quality or more stylish clothes (28), men's clothes (27), sports and causal clothes (23), all kinds of clothes (22), larger clothes for men and women (15), moderate priced clothes (13), children's clothes (10), and shoes (9).

Question 5: How often do you shop in the downtown for specialty items like books or records?

Just 3 percent of the respondents shop for specialty items in the downtown almost daily, 15 percent shop once a week, 33 percent shop from one to three times a month, 27 percent seldom do so, and 21 percent never shop for specialty items in the downtown. Wilmington residents shop for specialty items in the downtown somewhat more frequently than nonresidents--24 percent shop once a week or more as compared to 15 percent of nonresidents. People interviewed before 11:30 a.m. are more frequent shoppers for specialty items (29 percent as compared to only 13 percent of those interviewed between 11:30 and 2:00 p.m. and 18 percent of those interviewed after 2:00).

In answer to the question, **"What specialty items would you like to see more of in the downtown?"** gifts (22), books and magazines (17), records/music (14), nothing (10), arts and crafts (8),

sporting or outdoor goods (7), and hardware (7) receive the most mentions.

Question 6: How often do you use personal services in the downtown, like cleaning or shoe repair?⁷

Only 1 percent of the respondents use personal services in the downtown almost daily, 6 percent use them once a week, 25 percent use them from one to three times a month, 29 percent seldom use them, and 38 percent never use personal services in the downtown. Residents and nonresidents do not differ significantly in the use of personal services in the downtown.

Question 7: How often do you eat lunch in a downtown restaurant?

Over 37 percent of the respondents eat lunch in a downtown restaurant almost daily, 19 percent eat lunch there once a week, 16 percent from one to three times a month, 16 percent seldom and 12 percent never eat lunch in a downtown restaurant. Nearly two-thirds of the nonresidents eat lunch in a downtown restaurant at least once a week as compared to just under one-half of the city residents. Higher-income respondents eat lunch more frequently (70 percent of those from households earning more than \$36,000 as compared to only 28 percent of those from households earning less than \$6,000). Among the occupational categories, professional/technical and managers are the most frequent lunch patrons. Not surprisingly, about 80 percent of the respondents who are

⁷Follow-up questions such as "what personal services would you like to see in the downtown" were not used for this and subsequent questions because of the need to keep the interview under five minutes.

employed in the downtown eat lunch in a restaurant there at least once a week.

Question 8: How often to you eat dinner in a downtown restaurant?

Just over 1 percent of the respondents eat dinner in a downtown restaurant almost daily, 8 percent eat there once a week, 15 percent from one to three times a month, 40 percent seldom and 36 percent never eat dinner in a downtown restaurant. Just under 13 percent of the residents eat dinner in a downtown restaurant at least once a week as compared to 6 percent of the nonresidents. Those who are employed in or near the downtown are more likely to dine in the downtown once a month or more. Among the occupational categories, the most frequent evening diners are managers and those in professional/technical positions. Whites eat dinner in the downtown more frequently than nonwhites--27 percent at least once a month as compared to 15 percent of nonwhites.

Question 9: How often do you come into the downtown for entertainment?

About 1 percent of the respondents come into the downtown for entertainment almost daily, 5 percent come there once a week, 19 percent from one to three times a month, 37 percent seldom, and 38 percent never come into the downtown for entertainment. Residents and nonresidents do not differ significantly in their frequency of coming to the downtown for entertainment. Among residents, those who have lived in the city for less than a year are more likely than longer-term residents to go downtown for entertainment at least several times a month. Length of

residency in the city may be related to age since the younger respondents come to the downtown more frequently for entertainment--46 percent of those under 25 come to the downtown for entertainment at least once a month. Those between 35 and 54 come the least--only 18 percent come at least once a month. Finally, men come to the downtown for entertainment more frequently than women. About 29 percent of the male respondents come at least once a month versus 23 percent of the female respondents.

Question 10: If the shops were open, would you shop in the downtown in the evening?

There is almost a fifty-fifty split among the respondents in the willingness to shop in the downtown in the evening if the shops were open. By almost a two-to-one margin (68 percent as compared to 37 percent), Wilmington residents are more willing to shop in the downtown in the evening. Among the Wilmington residents, residential location is related to willingness to shop in the evening Center City residents are the most willing evening shoppers (100 percent), followed by residents of the Far North (83 percent), the Inner Core (81 percent), the Outer Core (65 percent), and, lastly, the Far West (44 percent).

Willingness to shop in the evening is related to income (perhaps because the average household income of Wilmington residents is lower than nonresidents). Thus 77 percent of those respondents from households earning less than \$6,000 are willing to shop in the evening as compared to only 40 percent of those from households earning more than \$36,000. Evening shopping in the

downtown is also related to occupation. The higher-income occupations (professional/technical and manager) are less willing to shop in the evening in contrast to those in services/manual labor and skilled labor occupations.

Finally, willingness to shop in the evening is directly related to age and race. Among those under 25, 62 percent are willing to evening shop as compared to only 26 percent of those 55 years and older. Similarly, as many as 77 percent of nonwhites would shop in the evening as compared to only 41 percent of whites.

Those who said they would not shop in the evening even if the shops were open were asked: "Why not?" The reason given most frequently is "it's too far from my home" or "it is not convenient" (49), followed by "I'm too afraid" or "it is too dangerous" (34), "there is no bus transportation" (14), "I don't shop at night" (9), and "it is more convenient to go to the malls" (9).

Question 11: Do you stop to watch the performers or special events on the Market Street Mall?

Nearly 65 percent of the respondents stop to watch the performers or special events on the mall, 19 percent reply "sometimes," and 16 percent never stop to watch. More Wilmington residents watch the mall events than nonresidents (75 percent versus 57 percent). Women are more frequent watchers than men (68 percent versus 61 percent). Nonwhites are also more likely to watch the mall events (75 percent as compared to 62 percent of whites).

Those who said they never stopped to watch the events were asked, "Why not." The most common answers are "I don't have time" (16), "I am not interested" (9), and "I live too far away" (3).

Question 12: Are there any special events that you would like to see on the mall?

Just under 45 percent of the respondents have suggestions for special events or express preference for certain types of events. The overwhelming favorite event is live music (29), followed by concerts or classical music (9), dance (7), a variety of activities (6), ethnic events (4), and activities for children (4).

Question 13: What do you think the merchants should be doing to improve the downtown?

Respondents were presented with five alternative merchant actions and were asked to indicate which ones should be carried out by the merchants to improve the downtown. Fix up the stores is the merchant action selected by the largest number of respondents (32 percent), followed by improve the quality of merchandise (21 percent), lower prices (20 percent), improve customer relations (11 percent), and improve window displays (6 percent). Wilmington residents are more concerned than nonresidents about the improvement of customer relations and lowering prices.

As many as 45 other improvements were mentioned including "have later store hours" (16 responses), "keep the mall clean" (10), "get more stores" (12), "advertise more" (7), "provide more parking" (6), "clean the area" (6), and "get a department store

here" (5).

Question 14: What do you think the City should be doing to improve the downtown?

Respondents also made 45 different suggestions regarding how the city could be improve the downtown. The suggestions that are most frequently made are "clean up and fix the mall" (69), "improve parking" (66), "provide more security" (27), "develop more stores" (23), "the mall is fine" (12), "provide bus service at night" (12), "open stores more at night or on the weekends" (9), "improve transportation" (7), and "improve the buildings" (6).

Question 15: What are your personal interests and hobbies?

An enormous variety of personal interests and hobbies are indicated by the respondents--75 in total. These include athletics and sports (70), reading (69), no hobbies (57), music (42), sewing or needlepoint (24), arts and crafts (22), photography (17), painting and art (15), travel (14), swimming (14), theater (12), TV and radio (11), tennis (10), skiing (9), fishing (9), camping (9), sailing (9), movies (8), cooking (8), dancing (7), singing (7), gardening (7), golf (6), horse racing (6), children (6), and writing (6).