2011 Downtown Manchester Special Services District Study

Prepared for:

Statement of Confidentiality and Ownership

All of the analyses, findings, data, and recommendations contained within this report are the exclusive property of the Downtown Manchester Special Services District, Town of Manchester, Connecticut.

As required by the Code of Ethics of the National Council on Public Polls and the United States Privacy Act of 1974, The Center for Research maintains the anonymity of respondents to surveys the firm conducts. No information will be released that might, in any way, reveal the identity of the respondent.

Moreover, no information regarding these findings will be released without the written consent of an authorized representative of the Downtown Manchester Special Services District.

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1 INTRODUCTION

The Center for Research (CFR) is pleased to present the results of a telephone survey conducted among residents of Manchester, Connecticut and surrounding towns in order to obtain residential input as part of preparing a long-range plan for the Downtown Manchester Special Services District.

The research study included a comprehensive telephone survey with interviews conducted among residents living in Manchester, Bolton, Glastonbury, South Windsor, Vernon and East Hartford. CFR, working together with AMS Consulting and officials from the Downtown Manchester Special Services District, designed the survey instrument to be used when calling residents of Manchester and surrounding towns.

This report summarizes information collected from telephone surveys conducted from October 21 through October 28, 2011.

The survey instrument employed in the study included the following areas for investigation:

- Reasons for residing in Manchester or a surrounding town;
- Ratings of overall quality of life in Manchester (or their town of residence);
- Usages of the Downtown Manchester area;
- Likes and dislikes of the Downtown Manchester area;
- Barriers to visiting Downtown Manchester;
- Suggestions for improvement to the Downtown Manchester area; and
- Demographics.

Section II of this report discusses the Methodology used in the study, while Section III includes Highlights derived from an analysis of the quantitative research. Section IV is a Summary of Findings for the residential telephone surveys - a narrative account of the data.

Section V is an Appendix to the report containing a copy of the survey instrument and the composite aggregate data.

2 METHODOLOGY

Using a quantitative research design, CFR completed 400 interviews with Connecticut residents living in Manchester, Bolton, Glastonbury, South Windsor, Vernon and East Hartford.

All telephone interviews were conducted from October 21 through October 28, 2011.

Survey input was provided by officials of AMS Consulting and the Downtown Manchester Special Services District.

Survey design at CFR is a careful, deliberative process to ensure fair, objective and balanced surveys. Staff members, with years of survey design experience, edit any bias. Further, all scales used by CFR (either numeric, such as one through ten, or wording such as strongly agree, somewhat agree, somewhat disagree, or strongly disagree) are balanced evenly. And, placement of questions is carefully accomplished so that order has no impact.

All population based surveys conducted by CFR are proportional to population contributions within States, towns, and known census tract, group blocks and blocks. This distribution ensures truly representative results without under or over representation of various geographic or demographic groups within a sampling frame.

CFR utilized a "super random digit" sampling procedure, which derives a working telephone sample of both listed and unlisted telephone numbers. This method of sample selection eliminates any bias toward only listed telephone numbers. Additionally, this process allows randomization of numbers, which equalizes the probability of qualified respondents being included in the sampling frame. In addition, CFR included cell phone sample to accommodate those households without a traditional land line.

One survey instrument was used to elicit information from residents of Manchester and surrounding towns. Respondents qualified for the survey if they confirmed to be at least twenty years of age, one of the heads of their household, a resident of Manchester, Bolton, Glastonbury, South Windsor, Vernon or East Hartford, and reported to have some familiarity with the Downtown Manchester area.

For the purpose of this study, the "Downtown Manchester" area referenced throughout the survey was defined as the geographic region along Main Street bordered by Center Street to the north and Hartford Road/Charter Oak Street to the south.

Training of telephone researchers and pre-test of the survey instruments occurred on October 21, 2011.

All facets of the study were completed by CFR's senior staff and researchers. These aspects include: survey design, pre-test, computer programming, fielding, coding, editing, data entry, verification, validation and logic checks, computer analysis, analysis, and report writing.

Completion rates are a critical aspect of any telephone survey research. Because one group of people might be easier to reach than another group, it is important that concentrated efforts are made to reach all groups to an equal degree.

A high completion rate means that a high percentage of the customers within the original sample were actually contacted, and the resulting sample is not biased toward one potential audience. CFR maintained an **83%** completion rate on all calls made during this telephone survey. And, a high completion rate, many times indicates an interest in the topic.

Statistically, a sample of 400 surveys represents a margin for error of +/-5.0% at a 95% confidence level.

In theory, this sample of Manchester residents will differ no more than +/-5.0% than if all Manchester and surrounding town residents were contacted and included in the survey. That is, if random probability sampling procedures were reiterated over and over again, sample results may be expected to approximate the larger population values within plus or minus +/5.0% -- 95 out of 100 times.

Readers of this report should note that any survey is analogous to a snapshot in time and results are only reflective of the time period in which the survey was undertaken. Should concerted public information or relations campaigns be undertaken during or shortly after the fielding of the survey, the results contained herein may be expected to change and should be, therefore, carefully interpreted and extrapolated.

Furthermore, it is important to note that all surveys contain some component of "sampling error." Error that is attributable to systematic bias has been significantly reduced by utilizing strict random probability procedures. This sample was strictly random in that selection of each potential respondent was an independent event, based on known probabilities.

Each qualified household within the sample area had an equal chance for participating in the study. Statistical random error, however, can never be eliminated but may be significantly reduced by increasing sample size.

3 HIGHLIGHTS

ON GENERAL CHARACTERISTICS OF RESPONDENTS…

- **A sample of 400 respondents were surveyed for the Downtown Manchester Market Assessment study from the following Connecticut towns:**

Town…	*# of surveys completed*
Manchester	250
Glastonbury	42
Vernon	37
East Hartford	33
South Windsor	32
Bolton	6
Total	*400*

- **More than half of all respondents surveyed, 56.3%, reported to be "very familiar" with the Downtown Manchester area.**

- **Residential loyalty was strong among Manchester respondents as 63.6% or 159 of the 250 respondents surveyed from the town reported living there for "more than twenty years." Similarly, when asked why they originally chose to live in Manchester, one fourth of respondents, 24.8%, reported "always lived here/born and raised in town."**

- **The quality of the local school system appeared to be a differentiator between Manchester and some of the surrounding towns. While respondents from South Windsor (31.3%), Glastonbury (26.2%) and Bolton (16.7%) reported it as a top reason why they chose to live in that town, only 3.6% of Manchester respondents reported the same.**

ON QUALITY OF LIFE…

- **Respondents were split in regards to maintaining their current standard of living as 46.3% of respondents reported it was either "very easy" (11.8%) or "somewhat easy" (34.5%) to maintain their standard of living while 45.8% reported it to be "somewhat difficult" (34.0%) or "very difficult" (11.8%).**

- **When asked to provide the main reasons why they are having difficulty maintaining their standard of living, respondents indicated that "increase/high taxes" (24.0%), "price increase-gasoline" (14.8%) and "employment-loss of job/no job" (14.8%) were listed as their main issues.**

ON THE PERCEPTION OF DOWNTOWN MANCHESTER…

- **Three-quarters of all respondents, 74.0%, reported to have a "very favorable" (19.3%) or "somewhat favorable" (54.8%) perception of the Downtown Manchester area, while only 20.8% reported their perception to be either "somewhat unfavorable" (14.5%) or "not at all favorable" (6.3%).**

- **When asked for any suggestions on what the Downtown Manchester Special Services District could do to improve their perception of the area, respondents provided "more stores-general" (18.3%) and "improve aesthetics" (7.8%) as their top suggestions.**

- **While safety did not appear to be a major driver, it is important to note that 5.5% of respondents provided "safety concerns" as a reason for their negative perception of Manchester, and 6.0% reported "improve safety" as something that could be done to improve their perception of Downtown Manchester.**

ON USAGE OF DOWNTOWN MANCHESTER …

- **A series of questions were directed at those respondents who reported to travel to Downtown Manchester at least "a few times a year" or "depending on the need." These questions were answered by 340 respondents or 85.0% of the total sample.**

- **"Restaurants, food, spirits, and bakeries" appeared to be a primary reason respondents were attracted to Downtown Manchester as 57.1% of the responses collected included these types of businesses. This was followed by "library" (19.7%), "traditional health care" (18.5%) and "banks" (13.2%).**

- **Loyalty is strong among patrons of local businesses in Downtown Manchester as 54.4% of respondents reported to be "an advocate" (8.2%), "a loyal customer" (16.2%) or "a satisfied customer" (30.0%) of those businesses. Additionally, 37.4% of respondents reported to be "a satisfied customer," while only 0.6% reported to be "a dissatisfied customer."**

- **Importantly, while 43.8% of respondents reported visiting "only one business," advocacy and loyalty rates were higher among those respondents that visited several businesses. One-third of those respondents, 33.6%, who reported visiting several businesses considered themselves either "advocates" or "loyal customers" of those businesses.**

ON THE MARKET….

- **Three-quarters of respondents, 75.9%, reported the *price* of goods and services in Downtown Manchester compared "very favorably" (25.0%) or "somewhat favorably" (50.9%) to their current standard of living. Similarly, 80.9% of respondents provided a positive rating of 1 or 2 on a five-point scale when asked to rate the *service* they receive at stores and businesses in the Downtown Manchester area.**

- **All respondents, regardless of how frequently they visit Downtown Manchester, were asked to provide any barriers that keep them from visiting more. While 46.5% reported having "no barriers," one-quarter of respondents, 25.0%, reported that "there's nothing there/needs more."**

- **Additionally, more than one-tenth of respondents, 13.5%, did indicate there was some difficulty getting to the Downtown area, whether it was "inconvenient" (8.5%) or that their barrier was "store hours/difficult to get there when stores are open" (5.0%).**

- **Events appeared to be a positive driver to the area as 59.3% of respondents reported attending a special event in Downtown Manchester and 51.3% of respondents reported that if more of these events were hosted it would "increase" their visits to the Downtown area. It should be noted that while 70.8% of Manchester residents reported attending special events in Downtown Manchester, only 40.0% of out-of-town residents reported the same.**

- ***Retail shops*** **also appeared to be a strong driver to the Downtown area as nearly two-thirds of respondents, 64.0%, reported to be "much more likely" (29.0%) or "somewhat more likely" (35.0%) to visit Downtown Manchester if there were more of these stores.**

- ***Professional services*** **and** ***health and personal services*** **did not appear to be drivers to the area. Less than one-fifth of respondents, 17.5% reported to be "much more likely" (6.5%) or "somewhat more likely" (11.0%) to visit Downtown if there were more** ***professional services*** **while 27.0% reported to "much more likely" (9.0%) or "somewhat more likely" (18.0%) to visit if more** ***health and personal services*** **were available.**

MOVING FORWARD….

- **Bars, restaurants and other retail shops are the types of businesses that consumers indicate wanting to see more of in the Downtown Manchester area. Similarly, these establishments tended to be the greatest draw to the area currently.**

- **It is recommended that businesses try to take a co-active approach to drawing customers as data shows that "advocates" and "loyal" customers tend to visit several businesses while in Downtown Manchester. Businesses can work together to have these "advocates" and "loyalists" visit multiple shops while in the Downtown area.**

- **Special events are an effective exposure tool for businesses and stores in the Downtown area; increasing awareness and participation at Downtown Manchester special events among non-Manchester residents will help to provide exposure for Downtown businesses.**

- **Finally, results show that there were no explicit barriers to visiting Downtown Manchester and if a greater variety of businesses were available, many respondents would be more likely to travel there.**

4 SUMMARY OF FINDINGS

Readers are reminded that the following section summarizes statistics collected from telephone interviews conducted among 400 residents of Manchester, Bolton, Glastonbury, South Windsor, Vernon and East Hartford, Connecticut.

Town…	*# of surveys completed*
Manchester	**250**
Glastonbury	**42**
Vernon	**37**
East Hartford	**33**
South Windsor	**32**
Bolton	**6**
Total	***400***

GENERAL CHARACTERISTICS

As part of an initial screener question to ensure eligibility, all respondents were asked to indicate the town they currently reside in. The sample plan agreed to by CFR, AMS Consulting and the Downtown Manchester Special Services District is carefully reflected in the final breakdown of towns reported.

What town do you currently reside in?	*2011 Comp. (N=400)*
Manchester	62.5%
Glastonbury	10.5
Vernon	9.3
East Hartford	8.3
South Windsor	8.0
Bolton	1.5

When asked how long they have lived in the town they currently reside in, more than three-fifths of respondents, 62.3%, reported "more than twenty years."

How long have you lived in your current town?	*2011 Comp. (N=400)*	*2011 Resident (N=250)*	*2011 Non-resident (N=150)*
Less than two years	2.0%	1.6	2.7
Two to five years	7.8	7.6	8.0
Six to ten years	13.5	13.6	13.3
Eleven to twenty years	14.5	13.6	16.0
More than twenty years	62.3	63.6	60.0
Don't know/refused	---	---	---

In an open-ended format, all respondents were asked by researchers why they originally chose to live in their current town. The following tables present a breakdown of responses by what town the respondent resided in.

Why did you originally choose to live in Manchester?	***2011***
Location (close to work/close to family)	38.8%
Always lived here/ born & raised in town	24.8
Specific character (nice house, nice neighborhood)	14.4
Overall character (beautiful town/beautiful area)	12.0
Cost of living (affordable)	8.0
School system	3.6
Moved for spouse	3.2
Location (close to shore/water/recreation)	1.6
Community facilities and services	1.6
Bought home/re-located to area	1.6
Size of town/small town/quaint	1.6
Don't know/unsure	1.2
Immigrated to country/area	0.4

Why did you originally choose to live in Glastonbury?	***2011***
Always lived here/ born & raised in town	33.3%
School system	26.2
Location (close to work/close to family)	21.4
Overall character (beautiful town/beautiful area)	19.0
Specific character (nice house, nice neighborhood)	11.9
Cost of living (affordable)	9.5
Location (close to shore/water/recreation)	2.4

Why did you originally choose to live in Vernon?	***2011***
Location (close to work/close to family)	32.4%
Specific character (nice house, nice neighborhood)	29.7
Cost of living (affordable)	16.2
Overall character (beautiful town/beautiful area)	13.5
Always lived here/ born & raised in town	10.8
Location (close to shore/water/recreation)	10.8
School system	8.1
Taxes	2.7
Moved for family/spouse	2.7
College	2.7
Needed a 55+ community	2.7
Don't know/unsure	2.7

Why did you originally choose to live in East Hartford?	*2011*
Location (close to work/close to family)	45.5%
Always lived here/ born & raised in town	18.2
Location (close to shore/water/recreation)	3.0
Overall character (beautiful town/beautiful area)	9.1
Specific character (nice house, nice neighborhood)	9.1
Moved for family/spouse	3.0
Bought home/relocated to area	6.1
Convenience	3.0
School system	3.0

Why did you originally choose to live in South Windsor?	*2011*
Location (close to work/close to family)	37.5%
School system	31.3
Specific character (nice house, nice neighborhood)	18.8
Overall character (beautiful town/beautiful area)	12.5
Always lived here/ born & raised in town	6.3
Cost of living (affordable)	6.3
Community facilities and services	3.1
Size of town/small town/quaint	3.1
Moved for family/spouse	3.1

Why did you originally choose to live in Bolton?	*2011*
Location (close to work/close to family)	50.0%
Overall character (beautiful town/beautiful area)	33.3
Specific character (nice house, nice neighborhood)	33.3
Always lived here/ born & raised in town	16.7
School system	16.7
Size of town/small town/quaint	16.7

When asked to indicate how familiar they are with the Downtown Manchester area, a majority of respondents, 92.3%, reported to be either "very familiar" (56.3%) or "somewhat familiar" (36.0%).

Readers should note those respondents that reported to be either "not at all familiar" or "unsure" of the Downtown Manchester area were not asked to complete the survey, which in turn led to the lack of responses in those categories.

How familiar are you with Downtown Manchester?	***2011 Comp. (N=400)***	***2011 Resident (N=250)***	***2011 Non-resident (N=150)***
Very familiar	56.3%	66.0	40.0
Somewhat familiar	36.0	29.6	46.7
Somewhat unfamiliar	7.8	4.4	13.3
Not at all familiar	---	---	---
Don't know/unsure	---	---	---
Total familiar	***92.3***	***95.6***	***86.7***
Total unfamiliar	***7.8***	***4.4***	***13.3***

QUALITY OF LIFE

When asked to indicate how easy or difficult it is to maintain their standard of living, more than two-fifths of respondents, 45.8%, reported it is either "somewhat difficult" (34.0%) or "very difficult" (11.8%).

How easy to maintain your standard of living?	*2011 Comp. (N=400)*	*2011 Resident (N=250)*	*2011 Non-resident (N=150)*
Very easy	11.8%	11.2	12.7
Somewhat easy	34.5	32.4	38.0
Somewhat difficult	34.0	33.6	34.7
Very difficult	11.8	14.0	8.0
Don't know/unsure	8.0	8.8	6.7
Total easy	***46.3***	***43.6***	***50.7***
Total difficult	***45.8***	***47.6***	***42.7***

In an open-ended format question, respondents were asked to indicate the reason why they are having a difficult time maintaining their standard of living.

As presented in the following table, almost one-quarter of respondents, 24.0%, reported because of the "increase/high taxes." Readers should note multiple responses were accepted.

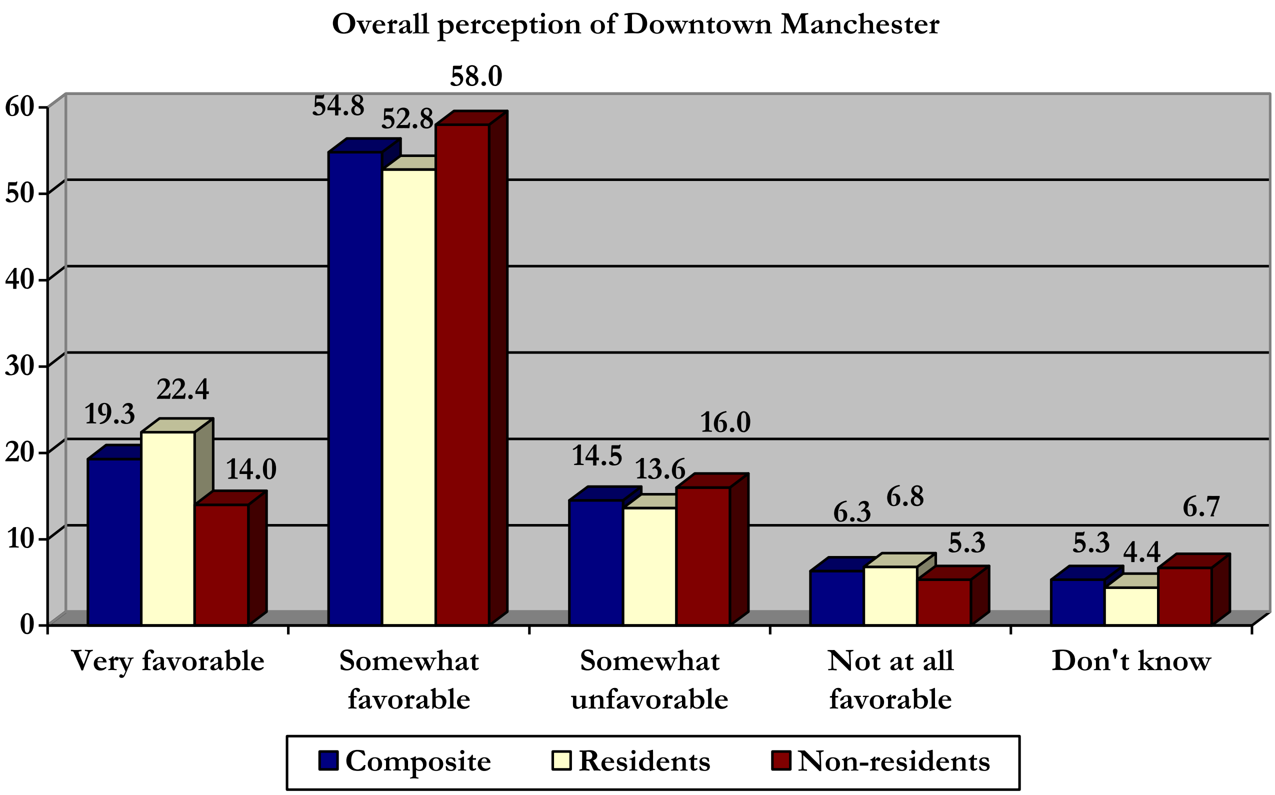
Reason(s) for difficulty maintaining standard of living…	*2011*
Increase/high taxes	24.0%
Price increase-gasoline	14.8
Employment-loss of job/no job	14.8
Employment- low paying job/insufficient pay increases	14.2
Price increase- electric rates	13.1
Economy	10.4
Price increase- natural gas rates	9.3
Price increase-general goods (food, clothing, etc.)	7.7
Price increase- heating oil	7.1
Insurance- cost increase, copay, premiums	5.5
Retired/fixed-income	5.5
Children-general/just had another	4.4
Don't know/unsure	4.4
Health problems/medical bills	3.8
Housing- repairs, upgrades, additions, problems	3.8

* For a complete list of responses, please refer to page 2 of the composite dataset.

PERCEPTIONS OF DOWNTOWN MANCHESTER

All respondents were presented with the following statement: *"For purposes of our survey today, Downtown Manchester is referred to as the Main Street area between Hartford Road and Center Street. Now, based on all you know or have heard, how would you describe your overall perception of the Downtown Manchester area? Would you say…"*

As presented in the following table, nearly three-quarters of all respondents, 74.1%, reported to have either a "very favorable" (19.3%) or "somewhat favorable" (54.8%) overall perception of the Downtown Manchester area.



All respondents were asked, in open-ended format, to provide a reason for their current perception of Downtown Manchester. As presented in the table below, the top response reported was "nothing there/needs more businesses" (15.8%).

Reason for perception of Downtown Manchester…	***2011 Comp. (N=400)***	***2011 Resident (N=250)***	***2011 Non-resident (N=150)***
Nothing there/needs more businesses	15.8%	18.4	11.3
Don't know/no specific reason	10.5	11.2	9.3
Improving but still needs work	9.8	10.8	8.0
General 'bad'-falling apart, dump, needs upgrade	9.8	7.2	14.0
Like the old fashion, quaint, charm of area	9.5	10.8	7.3
Like stores/variety of stores	9.0	9.2	8.7
Well-kept/clean/well maintained	7.5	8.0	6.7
Safety concerns	5.5	6.4	4.0
Convenient/easily accessible	5.5	4.0	8.0
Nostalgia-"not as it was"	4.3	2.8	6.7
Just don't go there often	4.3	2.4	7.3
General 'good'-love it, use it every day, very happy	2.8	2.4	3.3
Transportation issues-lack of parking/lack of buses	2.5	2.8	2.0
Like restaurants	2.3	2.0	2.7
Only go for one reason	1.0	1.2	0.7
Need post office back	0.3	0.4	---

As a follow-up, all respondents were then asked to provide any suggestions for how the Downtown Manchester Special Services District could help improve their current perception of the Downtown Manchester area.

What could the Downtown Manchester Special Services District do to improve your perception of Downtown Manchester?	***2011 Comp. (N=400)***	***2011 Resident (N=250)***	***2011 Non-resident (N=150)***
Nothing/no comment	40.8%	36.8	47.3
More stores-general	18.3	20.8	14.0
Improve aesthetics	7.8	5.6	11.3
Improve safety	6.0	8.0	2.7
More stores-retail	4.5	5.2	3.3
Improve parking	3.8	3.2	4.7
Fill vacancies/deal with empty buildings	3.0	4.0	1.3
Improve roads	2.8	2.4	3.3
More stores-restaurants	2.3	2.8	1.3
Improve walkways	2.0	2.0	2.0
Add grocery store/general store	2.0	2.0	2.0
Late night options/longer hours for stores	2.0	1.2	3.3
Nostalgia-"bring it back to the way it was"	1.8	1.6	2.0
Improve library	1.3	2.0	---
More family oriented	0.8	1.2	---
Bring back post office	0.8	1.2	---
Advertise more	0.5	---	1.3

USAGE OF DOWNTOWN MANCHESTER

All respondents were asked to indicate how regularly they travel to the Downtown Manchester area for shopping, services, entertainment, or food.

As presented in the following table, nearly two-thirds of respondents, 64.0%, reported at least "once a month."

How regularly do you travel to Downtown Manchester for shopping, services, entertainment, or food?	*2011 Comp. (N=400)*	*2011 Resident (N=250)*	*2011 Non-resident (N=150)*
More than once a week	17.5%	22.8	8.7
Once a week	16.0	21.2	7.3
Few times a month	18.0	18.4	17.3
Once a month	12.5	12.0	13.3
Few times a year	19.0	12.8	29.3
Once a year or less	6.5	2.0	14.0
Never	8.3	8.0	8.7
Depends on need	2.0	2.4	1.3
Don't know/unsure	0.3	0.4	---

Those respondents (85.0% or 340 respondents) who reported traveling to Downtown Manchester at least a "few times each year" or "depending on need" were asked to indicate what businesses or reasons primarily attract them to Downtown Manchester.

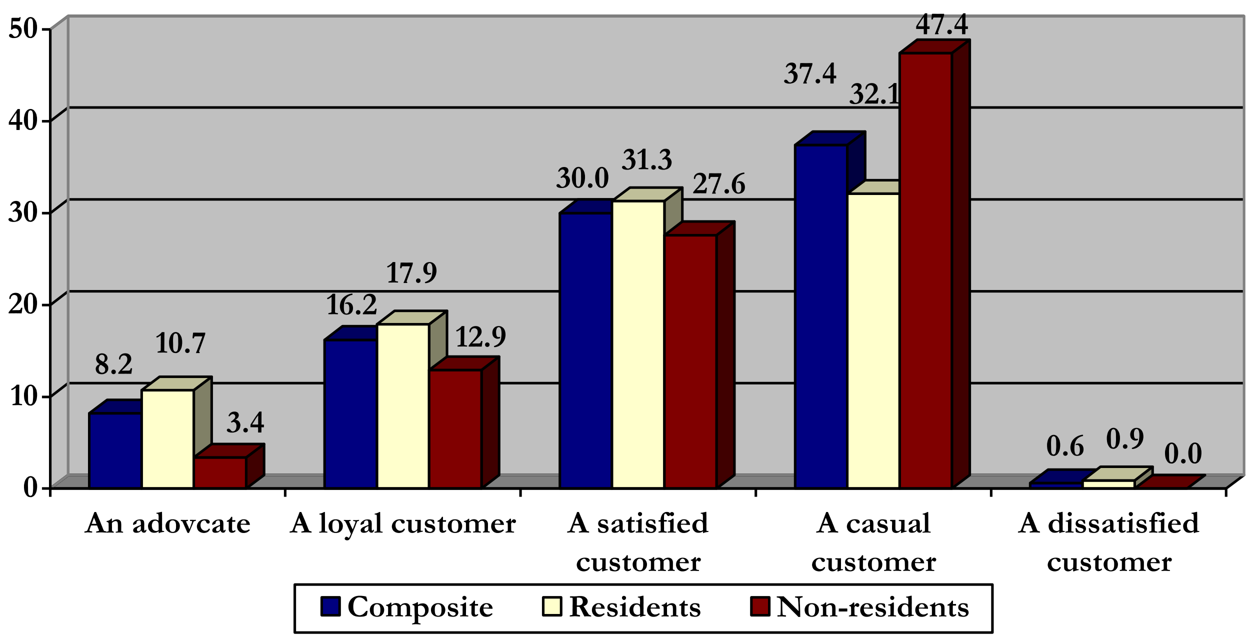
The table below presents the results as collected along with their frequency of mention. Readers should note multiple responses were collected.

What are the businesses or reasons that primarily attract you to Downtown Manchester?	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Restaurants, food, spirits, bakeries	57.1%	54.0	62.9
Library	19.7	24.6	10.3
Traditional Health care (dentists, optical, counseling, primary care physician, etc.)	18.5	18.3	19.0
Banks (in general)	13.2	17.9	4.3
Hardware store	8.8	11.6	3.4
Antique, gift, card or collectibles store	8.2	6.7	11.2
Churches (in general)	7.4	9.8	2.6
Personal services (hair care, barber shop, beauty salons, etc.)	6.8	8.0	4.3
Home furnishings and decorating	4.7	3.6	6.9
Apparel or clothing	4.1	4.0	4.3
Retail/general shopping	3.8	4.0	3.4
Jewelry	3.2	2.7	4.3
Nothing	2.9	3.1	2.6
Automotive	2.1	1.8	2.6
Business services	2.1	2.2	1.7
Meeting place/friends in the area	2.1	0.4	5.2
Gas/convenience store	1.8	2.2	0.9
Attorney or legal services	1.5	1.8	0.9
Elks club/army & navy club	1.5	1.3	1.7
Events	1.5	1.3	1.7
Don't know/unsure	1.2	0.9	1.7
Flower shop	1.2	0.9	1.7
Accountants	0.6	0.9	---
All	0.6	0.9	---
Alternative Health Care	0.6	0.4	0.9
Bike shop	0.6	---	1.7
Coin store	0.3	---	0.9
Food	0.3	0.4	---
MCC	0.3	0.4	---
Park	0.3	0.4	---
Photography or galleries	0.3	0.4	---
Theater	0.3	---	0.9

All respondents were asked to think about the businesses they frequent most often and indicate how they would describe their relationship with those businesses.

As presented in the following table, more than one-third of respondents reported to be "a casual customer" (37.4%).

How would you describe your relationship with those businesses?



All respondents were asked if, when visiting Downtown Manchester, they patronize only one business or do they generally walk between several businesses.

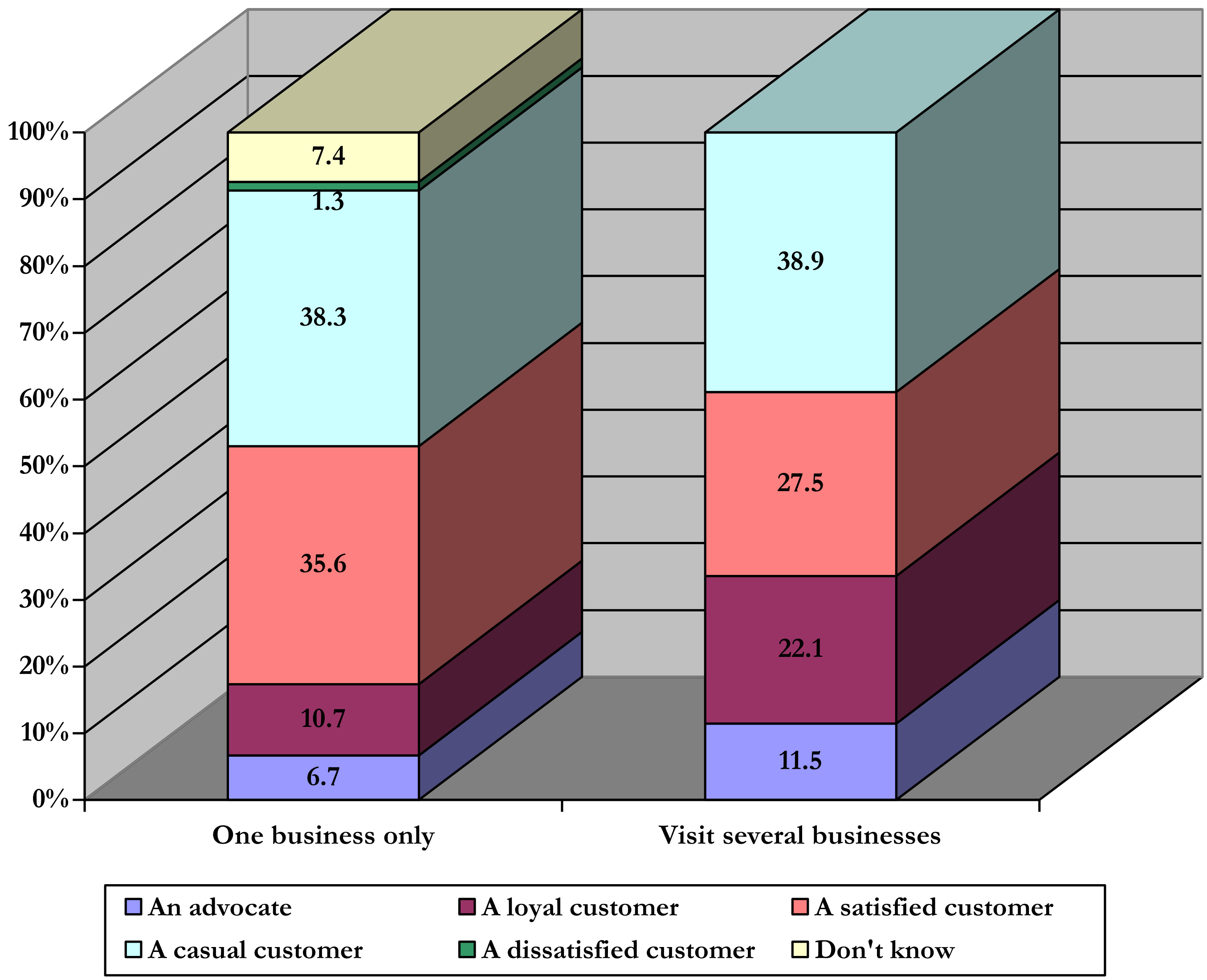
As presented in the table below, more than two-fifths of respondents, 43.8%, reported to "visit one business only."

Do you tend to patronize only one business or do you generally walk between several businesses?	*2011 Comp. (N=340)*	*2011 Resident (N=224)*	*2011 Non-resident (N=116)*
One business only	43.8%	44.2	43.1
Visit several businesses	38.5	41.5	32.8
Both	1.2	1.8	---
Depends on time/needs	12.6	8.5	20.7
Don't know/unsure	3.8	4.0	3.4

To better understand different market segments, a cross tabulation was analyzed between the different customer types (advocate, loyal, satisfied, etc.) and shopping tendency (one business visited only or several businesses visited).

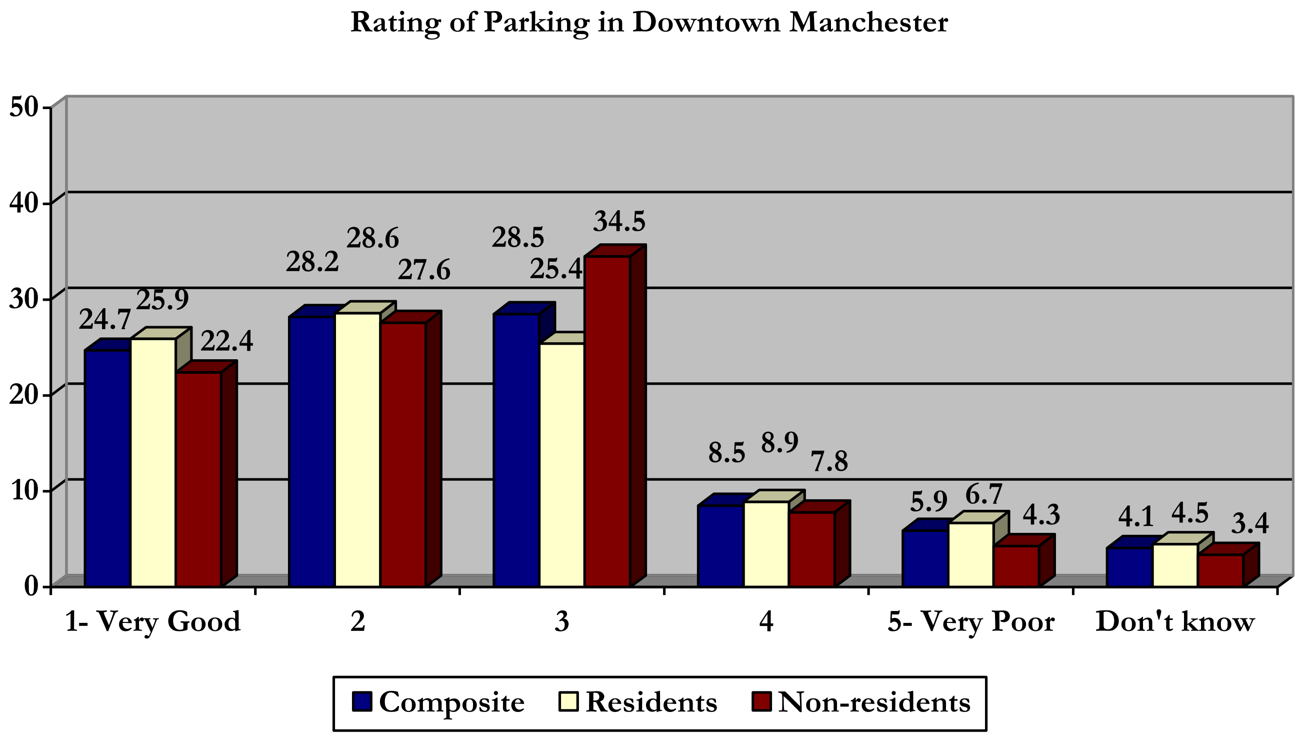
As presented in the chart below, one-third of all respondents, 33.6%, who reported they "visit several businesses" also reported being either "an advocate" (11.5%) or "a loyal customer" (22.1%) of those businesses.

Correlation between visiting Downtown Manchester and relationship with businesses



Respondents were asked, using a scale from one (1) to five (5) where one represented "very good" and five represented "very poor," to rate the availability of parking in Downtown Manchester.

As presented in the chart below, more than half of respondents, 52.9%, provided an overall positive rating of one (1) or two (2) on the five-point scale with respect to parking in the Downtown area.



Respondents were read a list of shopping locations and asked to indicate which of those locations they frequently shop at.

The table below presents the results as collected. Readers should note multiple responses were accepted.

Shopping locations frequently visited…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Large mall such as Buckland Hills or Westfarms Mall	57.4%	55.4	61.2
An upscale shopping area such as Evergreen Walk or Blueback Square	48.5	46.0	53.4
Strip mall such as Manchester Parkade	47.9	56.3	31.9
Stand-alone shops	29.4	29.9	28.4
Don't know/unsure	3.8	3.1	5.2
None	1.8	1.3	2.6
Downtown Manchester	1.5	1.3	1.7
Wal-Mart or other big box stores	1.2	1.8	---
Online	0.9	0.9	0.9
Other	0.6	0.9	---
Restaurants	0.3	0.4	---

Following, respondents were asked, in open-ended format question, to indicate what frustrations, if any, they have with their typical shopping experience at the locations they visit most frequently.

Frustrations with shopping experiences…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Nothing/none/not at this time	59.1%	58.9	59.5
Parking	11.2	11.6	10.3
Over crowded	6.8	7.6	5.2
Traffic	5.3	2.7	10.3
Not enough variety	5.0	4.9	5.2
Poor service	3.8	4.9	1.7
Run down/needs improvement	3.8	5.4	0.9
Safety	2.6	1.8	4.3
Inconvenient	1.5	1.3	1.7
Too expensive	0.9	0.9	0.9

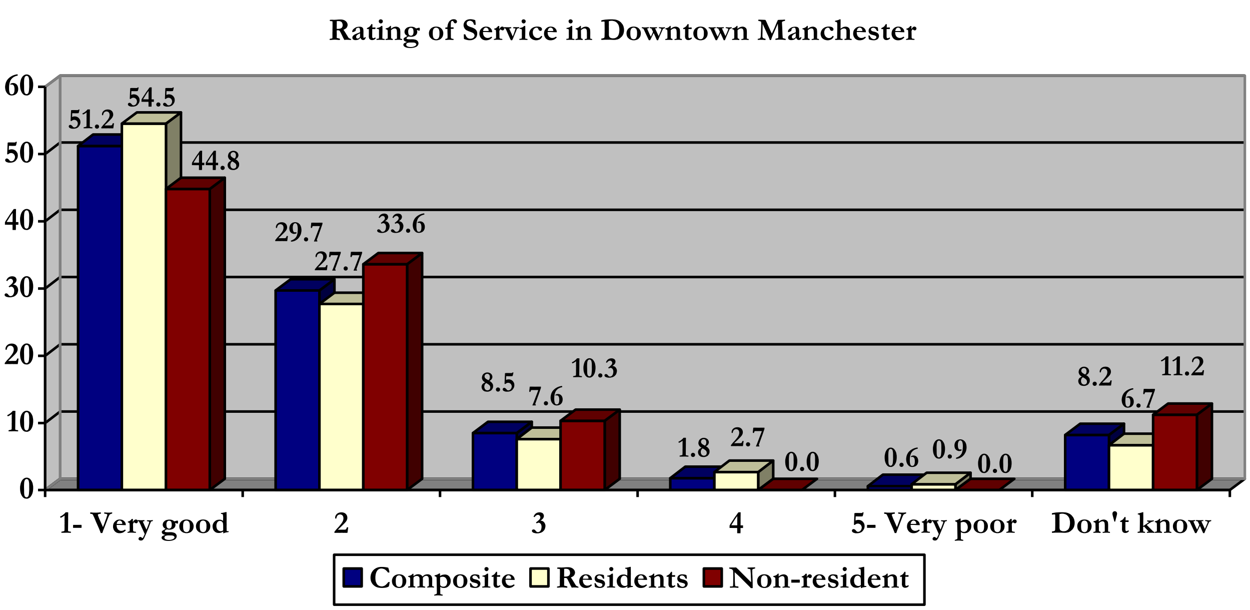
THE MARKET

Those respondents who reported visiting Downtown Manchester at least a "few times each year" or "depending on need" (85.0% or 340 respondents) were read the following statement: *"Overall, how do you feel the price of goods and services in Downtown Manchester compares with your standard of living? That is, the price of good and services works well within your household budget."*

The table below presents the results as collected.

How does the price of goods and services in Downtown Manchester compare with your standard of living?	***2011 Comp. (N=340)***	***2011 Resident (N=224)***	***2011 Non-resident (N=116)***
Very favorable	25.0%	25.0	25.0
Somewhat favorable	50.9	48.2	56.0
Somewhat unfavorable	5.6	7.6	1.7
Not favorable at all	3.2	4.9	---
Don't know/unsure	15.3	14.3	17.2
Total favorable	***75.9***	***73.2***	***81.0***
Total unfavorable	***8.8***	***12.5***	***1.7***

Following, respondents were asked to rate, on a scale of one (1) to five (5) where one represented "very good" and five represented "very poor," the service they receive at stores and businesses in the Downtown Manchester area. As presented in the chart below, four-fifths of respondents, 80.9%, provided an overall positive rating of one or two on the five-point scale with respect to the service they receive at stores and businesses in the Downtown Manchester area.



When asked to indicate when they are generally most likely to visit Downtown Manchester, nearly one-third of respondents, 32.1%, reported they are most likely to visit "mid-day."

At what point in the day are you most likely to visit Downtown Manchester?	***2011 Comp. (N=340)***	***2011 Resident (N=224)***	***2011 Non-resident (N=116)***
Early morning	17.9%	17.0	19.8
Mid-day	32.1	31.7	32.8
Afternoon	25.6	26.3	24.1
Evening	15.0	14.7	15.5
Night-time	0.9	1.3	---
Don't know/unsure	8.5	8.9	7.8

All respondents were asked, in an open-ended format question, to provide any barriers that are currently keeping them from visiting the Downtown Manchester area more frequently.

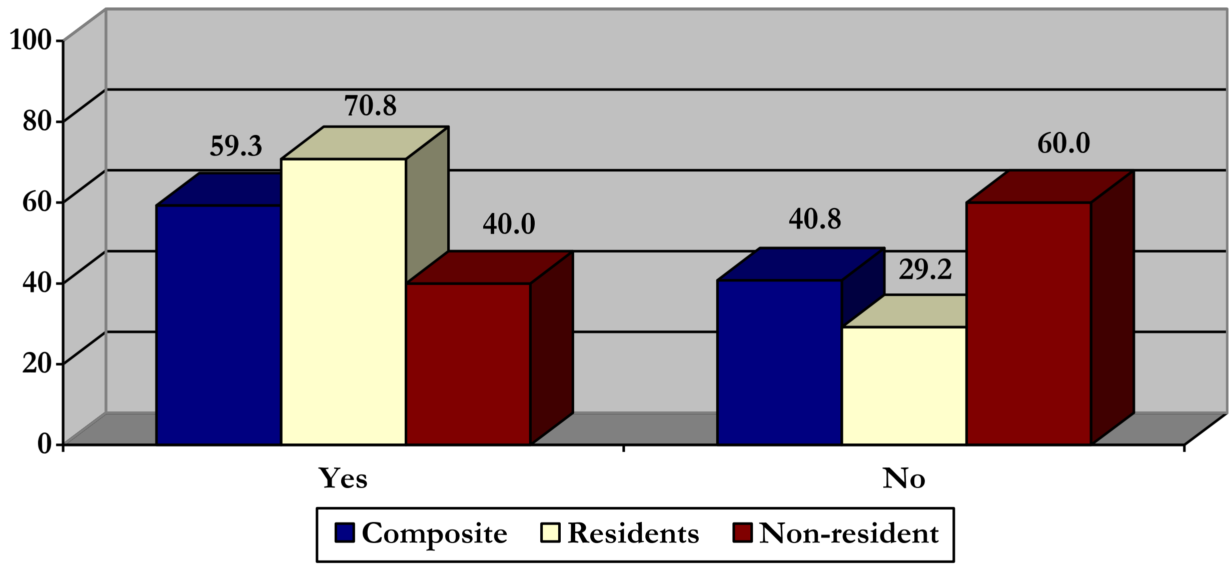
As indicated in the table below, the most commonly reported barriers to visiting Downtown Manchester more frequently were "there's nothing there/needs more" (25.0%) and "inconvenient" (8.5%).

What barriers, if any, keep you from visiting Downtown Manchester more often?	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
None/no barriers/nothing	46.5%	44.4	50.0
There's nothing there/needs more	25.0	25.6	24.0
Inconvenient	8.5	8.4	8.7
Safety	5.8	4.0	8.7
Store hours/difficult to get there when stores are open	5.0	7.2	1.3
Parking	4.3	5.6	2.0
Money	2.5	2.8	2.0
Generally prefer elsewhere	2.5	2.0	3.3

All respondents were asked if they have ever attended any special events in Downtown Manchester throughout the year, such as "Cruisin' on Main Street" and "Turkey Day Road Race."

Nearly three-fifths of all respondents, 59.3%, reported that "yes" they had attended one of these events.

Have you attended a special event in Downtown Manchester?



All respondents were asked to indicate how an increase in the amount of special events in Downtown Manchester would affect their number of visits to the area.

As presented in the table below, more than half of all respondents, 51.3%, indicated they would "increase" their number of visits to Downtown Manchester if there were more special events in the area, while 40.3% reported there would be "no change."

If Downtown Manchester were to host more of these events how would that affect your number of visits to the area?	*2011 Comp.*	*2011 Resident*	*2011 Non-resident*
Increase	51.3%	54.4	46.0
No change	40.3	37.2	45.3
Decrease	1.3	1.6	0.7
Don't know/unsure	7.3	6.8	8.0

All respondents were read the following statement: *"I will now read you a short list of businesses and attractions. If the Downtown Manchester area were able to increase the amount of each, please tell me if you would visit "much more frequently," "somewhat more frequently," "no change," "somewhat less frequently" or "much less frequently."*

The following tables present a comparison of each business/attraction mentioned and their effect on residents' visits to the Downtown Manchester area.

Retail shops (clothing, antiques, jewelry and home furnishings)…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Much more frequently	29.0%	30.8	26.0
Somewhat more frequently	35.0	34.4	36.0
No change	33.8	31.6	37.3
Somewhat less frequently	0.3	---	0.7
Much less frequently	0.5	0.8	---
Don't know	1.5	2.4	---
Total more frequently	***64.0***	***65.2***	***62.0***
Total less frequently	***0.8***	***0.8***	***0.7***

Plays and Live Performances…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Much more frequently	29.5%	32.8	24.0
Somewhat more frequently	27.0	25.6	29.3
No change	41.5	40.0	44.0
Somewhat less frequently	0.5	0.4	0.7
Much less frequently	0.3	0.4	---
Don't know	1.3	0.8	2.0
Total more frequently	***56.5***	***58.4***	***53.3***
Total less frequently	***0.8***	***0.8***	***0.7***

Live music…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Much more frequently	26.3%	30.0	20.0
Somewhat more frequently	28.0	27.2	29.3
No change	44.3	41.6	48.7
Somewhat less frequently	0.3	---	0.7
Much less frequently	0.3	0.4	---
Don't know	1.0	0.8	1.3
Total more frequently	***54.3***	***57.2***	***49.3***
Total less frequently	***0.6***	***0.4***	***0.7***

Restaurants/bars…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Much more frequently	24.5%	24.8	24.0
Somewhat more frequently	28.3	24.0	35.3
No change	44.8	48.4	38.7
Somewhat less frequently	0.5	0.4	0.7
Much less frequently	0.5	0.4	0.7
Don't know	1.5	2.0	0.7
Total more frequently	***52.8***	***48.8***	***59.3***
Total less frequently	***1.0***	***0.8***	***1.4***

Movies…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Much more frequently	27.3%	32.4	18.7
Somewhat more frequently	25.5	24.4	27.3
No change	45.3	41.6	51.3
Somewhat less frequently	0.8	0.4	1.3
Much less frequently	0.3	0.4	---
Don't know	1.0	0.8	1.3
Total more frequently	***52.8***	***56.8***	***46.0***
Total less frequently	***1.1***	***0.8***	***1.3***

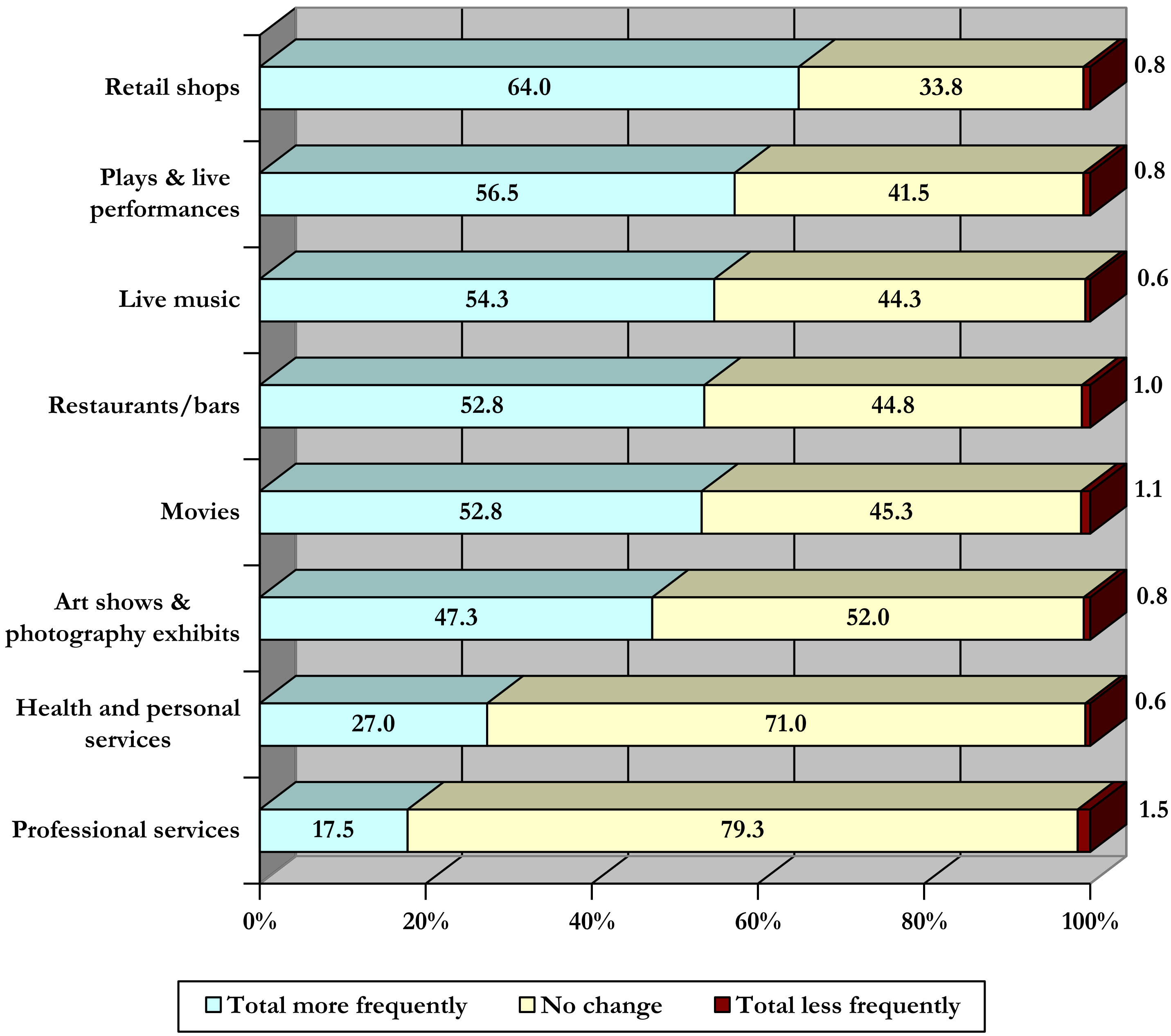
Art shows and Photography exhibits…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Much more frequently	25.0%	28.4	19.3
Somewhat more frequently	22.3	24.0	19.3
No change	52.0	46.8	60.7
Somewhat less frequently	0.5	0.4	0.7
Much less frequently	0.3	0.4	---
Don't know	---	---	---
Total more frequently	***47.3***	***52.4***	***38.6***
Total less frequently	***0.8***	***0.8***	***0.7***

Health and Personal services (doctors, dentists, barbers, beauty salons and fitness centers)…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Much more frequently	9.0%	10.8	6.0
Somewhat more frequently	18.0	20.0	14.7
No change	71.0	66.8	78.0
Somewhat less frequently	0.3	0.4	---
Much less frequently	0.3	---	0.7
Don't know	1.5	2.0	0.7
Total more frequently	***27.0***	***30.8***	***20.7***
Total less frequently	***0.6***	***0.4***	***0.7***

Professional Services (accountants, attorneys, banks and insurance)…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Much more frequently	6.5%	8.4	3.3
Somewhat more frequently	11.0	12.4	8.7
No change	79.3	74.4	87.3
Somewhat less frequently	1.0	1.2	0.7
Much less frequently	0.5	0.8	---
Don't know	1.8	2.8	---
Total more frequently	***17.5***	***20.8***	***12.0***
Total less frequently	***1.5***	***2.0***	***0.7***

The following chart presents a breakdown of composite data for each business/attraction mentioned and their effect (total more frequently, no change, or total less frequently) on respondent's visits to the Downtown Manchester area.

Potential Drivers to Downtown Manchester



In an open-ended question, all respondents were asked to indicate any additional businesses or attractions that would increase their number of regular visits to the Downtown Manchester area.

The table below presents the results as collected

Any additional businesses or attractions that would increase your regular visits to the downtown area…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Nothing/nothing else/no answer	70.5%	70.4	70.7
Events	5.5	4.0	8.0
Specialty stores/craft stores/gift shops	4.3	4.0	4.7
Family oriented stores/things for kids	4.0	4.4	3.3
Big Box Stores	3.5	4.4	2.0
Grocery store/supermarket/pharmacy	3.5	4.4	2.0
Post office	1.5	2.4	---
Cafe/coffee shop	1.0	1.2	0.7
Dunkin Donuts/Starbucks chains	0.8	0.4	1.3
Fabric store	0.8	0.4	1.3
Dollar store/second hand store	0.8	0.4	1.3
High end store/retail store	0.8	0.4	1.3
Shoe stores	0.5	0.8	---
Pet stores	0.5	0.4	0.7
Dancing	0.5	0.4	0.7
Book store	0.5	0.8	---
Music	0.5	---	1.3
Trolley	0.3	0.4	---
Roller skating/bowling alley	0.3	0.4	---
Auto repair	0.3	---	0.7

Demographics

Age…	*2011 Comp.*	*2011 Resident*	*2011 Non-resident*
20 to 24	2.3%	1.6	3.3
25 to 34	6.8	7.2	6.0
35 to 44	10.5	6.4	17.3
45 to 54	12.3	12.8	11.3
55 to 64	23.3	25.2	20.0
65 to 74	23.3	24.0	22.0
75 to 84	13.5	12.8	14.7
85 or over	8.3	10.0	5.3

Own or rent?	*2011 Comp.*	*2011 Resident*	*2011 Non-resident*
Own	82.5%	79.2	88.0
Rent	15.0	19.6	7.3
Don't know/refused	2.5	1.2	4.7

Which school do you live closest to?	*2011 (N=250)*
Don't know/unsure	21.2%
Manchester High School	12.0
Buckley	8.0
Highland Park	8.0
Bennet	6.8
Keeney	6.4
Verplank	6.4
Waddell	6.4
Bowers	5.6
Robertson	5.2
Nathan Hale	4.8
Martin	4.0
Washington	2.8
Illing	2.0
Bentley	0.4

Marital status…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Married	39.3%	31.2	52.7
Single	18.3	21.2	13.3
Divorced	14.5	16.0	12.0
Widowed	23.0	26.0	18.0
Civil union/domestic partnership	0.8	0.4	1.3
Don't know/unsure	0.8	0.4	1.3
Refuse	3.5	4.8	1.3

Children under 18 living in home…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Zero	81.3%	84.4	76.0
One	6.8	7.2	6.0
Two	7.5	5.6	10.7
Three	2.8	2.0	4.0
Four or more	0.3	---	0.7
Refused	1.5	0.8	2.7

Current employment status…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Working full-time	36.3%	36.8	35.3
Working part-time	8.5	8.4	8.7
Student	1.3	1.2	1.3
Retired	44.5	42.8	47.3
Unemployed-looking for work	3.3	4.4	1.3
Unemployed-not looking for work	0.8	0.4	1.3
Unemployed-unable to work because of disability	2.0	2.4	1.3
Homemaker	2.5	2.4	2.7
Don't know/unsure/other	1.0	1.2	0.7

Gender…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
Female	75.0%	77.6	70.7
Male	25.0	22.4	29.3

In an open-ended format, all respondents were asked if they had any additional thoughts or concerns to share with the Downtown Manchester Special Services District. These thoughts and/or concerns, along with frequency of mention, are listed in the table below.

Additional thoughts or concerns for Downtown Manchester…	***2011 Comp.***	***2011 Resident***	***2011 Non-resident***
No comments	71.5%	68.4	76.7
Satisfied, keep doing what they're doing	4.0	4.8	2.7
Improve businesses available	3.5	2.8	4.7
Make more visitor friendly	3.3	4.8	0.7
Improve safety	3.0	3.6	2.0
Improve library	2.3	3.2	0.7
Parking	2.0	1.2	3.3
Nostalgia-bring back to how it was	1.8	2.4	0.7
Improve politics/governing	1.5	2.4	---
Improve look of downtown/store fronts	1.3	0.8	2.0
Create community centers	1.0	1.6	---
Make more affordable for businesses (high rent/property tax)	1.0	1.2	0.7
More entertainment	0.8	1.2	---
Continue events	0.8	---	2.0
Model after other downtown areas	0.8	0.4	1.3
Improve surrounding area	0.5	---	1.3
Appeal to younger crowd	0.5	0.4	0.7
Get shops to work together on promotions	0.5	0.4	0.7
Post office	0.3	0.4	---

APPENDIX 5

INTERPRETATION OF AGGREGATE RESULTS

The computer processed data for this survey is presented in the following frequency distributions. It is important to note that the wordings of the variable labels and value labels in the computer-processed data are largely abbreviated descriptions of the Questionnaire items and available response categories.

The frequency distributions include the category or response for the question items. Responses deemed not appropriate for classification have been grouped together under the "Other" code.

The "NA" category label refers to "No Answer" or "Not Applicable." This code is also used to classify ambiguous responses. In addition, the "DK/RF" category includes those respondents who did not know their answer to a question or declined to answer it. In many of the tables, a group of responses may be tagged as "Missing" – occasionally, certain individual's responses may not be required to specific questions and thus are excluded. Although when this category of response is used, the computations of percentages are presented in two (2) ways in the frequency distributions: 1) with their inclusion (as a proportion of the total sample), and 2) their exclusion (as a proportion of a sample sub-group).

Each frequency distribution includes the absolute observed occurrence of each response (i.e. the total number of cases in each category). Immediately adjacent to the right of the column of absolute frequencies is the column of relative frequencies. These are the percentages of cases falling in each category response, including those cases designated as missing data. To the right of the relative frequency column is the adjusted frequency distribution column that contains the relative frequencies based on the legitimate (i.e. non-missing) cases. That is, the total base for the adjusted frequency distribution excludes the missing data. For many Questionnaire items, the relative frequencies and the adjusted frequencies will be nearly the same. However, some items that elicit a sizable number of missing data will produce quite substantial percentage differences between the two columns of frequencies. The careful analyst will cautiously consider both distributions.

The last column of data within the frequency distribution is the cumulative frequency distribution (Cum Freq.). This column is simply an adjusted frequency distribution of the sum of all previous categories of response and the current category of response. Its primary usefulness is to gauge some ordered or ranked meaning.