January 30, 2019

SCARSDALE FORUM INC.

Report of the Downtown Revitalization Committee
On
The Merchant Survey Concerning Scarsdale Village Center

The Downtown Revitalization Committee (the "Committee") proposes the following resolution for adoption by the Scarsdale Forum:

> RESOLVED, that the Report of the Committee (the "Report") summarizing the results of the Merchant Survey Concerning Scarsdale Village Center (the "Merchant Survey") be approved and distributed to the Village Board of Trustees as well as the community, with the Committee's recommendations for action, summarized as follows, to be considered for further study and implementation.

PREFACE

Revitalizing the Scarsdale Village Center is an opportunity to define and celebrate its distinct personality. The challenge for the Committee is to define the combination of uses that best reflects the community's preferences, captures market opportunities, builds on local assets, and strengthens the community's identity.[1] Although all Village stakeholders are important to developing a revitalized Village Center, this particular survey focuses on the merchants, whose livelihood is dependent on a strong, thriving downtown. Scarsdale residents and other stakeholders also benefit from a healthy business environment in terms of the convenience and variety of goods and services offered locally, increased community pride, a boost to home values, and a stronger tax base.

A thriving downtown is evidenced in part by the continuity and health of existing businesses. Retaining existing businesses is easier and more cost-effective than recruiting new ones, although new businesses need to be recruited for empty storefronts. Village merchants have an established relationship with shoppers, know the market, and are committed to the community. When provided with adequate support and resources, these merchants can evolve, offering new goods and services and/or upgrading their facilities to meet the changing demands of the local community. The Merchant Survey asked existing Village Center business owners or managers to provide information as to what might help them expand their sales, and better meet customer needs. The survey also asked them to recommend complementary providers of products and services that might add to the vitality of downtown Scarsdale.[2]

To develop market-based strategic recommendations, the Committee customized a Business Owner Survey designed by the University of Wisconsin and recommended by Main Street America. The survey was designed to engage the business community in the market analysis process. It invited business owners to share their perspectives regarding the current and future health of the downtown and provide essential information on business needs and opportunities – information that may be used to support downtown business retention and expansion initiatives.[3]

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[1] See: Main Street National Trust for Historic Preservation, Revitalizing Main Street: A practitioner's guide to comprehensive commercial district revitalization (2009), Chapter 9, "Improving Commercial Dynamics," pp. 69-70.
[2] See: Revitalizing Main Street, Chapter 9, "Synthesizing market Information," pp. 83-85.
[3] See: https://fyi.uwex.edu/downtown-market-analysis/understanding-the-market/business-owners-survey/

SUMMARY OF THE RECOMMENDATIONS OF THE COMMITTEE

The recommendations outlined below are based on the results of the Merchant Survey, and suggest actions that stakeholders – Village officials, boards and councils, landlords, merchants, and independent agencies – may consider:

a) Form a subcommittee of the Downtown Revitalization Committee to review comprehensive solutions to the parking issues in the Scarsdale downtown, including the Committee's 2018 Consumer Survey (the "Consumer Survey"), the 2018 Traffic Study, the 2018 Parking Meter Study and the ongoing Freightway Development Project;

b) Improve the number and variety of restaurants and retail establishments by combining and comparing the results of the Merchant Survey with the Consumer Survey;

c) Improve the communication of Downtown projects, customer feedback and advertising channels available to merchants and business owners;

d) Improve the Downtown infrastructure and landscaping in Chase Park, Boniface Circle, green spaces, and sidewalk spaces, in anticipation of greater pedestrian traffic, extended evening hours, and weekend use of downtown services; and

e) Make recommendations on how relevant portions of the Village Center Component of the Scarsdale Comprehensive Plan, October 1994 (updated in 2010) (the "Scarsdale Comprehensive Plan") should be implemented during 2019.

The Committee intends to work with the relevant stakeholders and other interested parties to further study the issues and assist in implementing the recommendations set forth above.

Major Conclusions

Based on the results of the Merchant Survey, the Committee concludes:

1. A majority of the merchants responding to the survey indicated that they perceive the Village Center as a generally desirable and attractive location for their business. Most business owners who responded to the survey intend to stay in the Village downtown for the foreseeable future. On the economic front, a majority of the merchants surveyed reported that the health of their business is accelerating rather than declining. Some businesses are even considering expanding their square footage.

2. The lack of adequate and desirable parking was identified by the merchants as the overwhelming obstacle to doing business in the downtown. There appears to be competition between Village merchants and their employees on the one hand, and shoppers on the other, for limited metered parking spaces in the Village Center.

3. Merchants believe that they are generally open when customers seek their services. If there were prospects for additional sales they would add staff and increase hours of operation.

4. Merchants wish to expand the number of "complementary" businesses that could drive business, including restaurants and a greater variety of retail stores.

5. Key factors that would increase visits to the Village Center, increase sales and services, and lead to expanded hours of operation include:

    - Increase the stock of available parking places for consumers. Provide incentives to encourage employees to park in garages and not in metered parking spaces.

    - Improve meter management to increase the stock of available consumer parking places, particularly during lunchtime and on Saturdays.

    - Add valet parking service operator to the Village Center to leverage existing parking supply and improve consumer convenience.

Discussion

The Committee launched an in-person survey[4], which ran from August, 2017 through February, 2018, drawing responses from 78 of 120 targeted businesses in downtown Scarsdale. At the time the Merchant Survey was taken, there were 16 empty storefronts, 11 of which were in the Village Center area[5]. The Village Center was defined in the Scarsdale Comprehensive Plan and in this Merchant Survey as roughly bounded by Christie Place to the north, Chase Park and Chase Road to the east, the Scarsdale-Eastchester boundary to the south, and the Bronx River on the west, although some merchants located outside these boundaries were surveyed to obtain their perspectives. The average time spent to fill out the survey was 45 minutes. The purpose of the survey was to gather business information to help revitalize the Scarsdale Village Center, and to potentially update the Scarsdale Comprehensive Plan.

There were three substantive areas of research in the Merchant Survey:

Needs and Opportunities Assessment—Questions 1-11:

- What business challenges, if any, they are experiencing;
- What changes to the Village Center would be useful;
- What new businesses and services would help attract customers;
- What existing or new business support services would be helpful;
- What are their attitudes toward being a local business owner that support the business community;
- How satisfied they are with their present location and why;
- What plans, if any, they have to expand or reduce operations; and
- What physical improvements, if any, they may be considering, and similarly, if the building owner or the Village should consider any building improvement projects.

Business and Workforce Data—Questions 12-20:

- How long they have been in operation;
- How many years are left on their lease;
- How customers get to the business;
- Where their customers typically park;
- How many employees work on a typical day;

[4] The complete Merchant Survey questionnaire is attached as Exhibit A.
[5] As of the date of this report, there are 5 empty storefronts in the Village Center, and 4 empty storefronts in the nearby downtown areas.

- What hours do those employees work on a typical day;
- How do employees get to work; and
- Where their employees typically park.

Market and Marketing Data—Questions 21-28:

- Their hours of operation and their thoughts on store hours;
- Their busiest times of the week;
- How many customers/clients visit their business per week;
- Top towns or villages from which their business draws customers;
- Their target market demographics; and
- Business sales done in person, over the phone or using the Internet.

In addition to the specific questions, there were opportunities for additional comments at the end of each substantive question, as well as an open-ended question at the end: "Do you have any other feedback that you would like to share?" The fact that so many merchants took the time to respond to this extensive questionnaire, including providing free-form comments, attests to the passion and commitment that the merchants feel toward garnering support for the continued health of their businesses, and in making the Scarsdale Village Center a thriving, robust and congenial place to shop, eat, and meet with friends.

1. Parking spaces and parking enforcement

When merchants were asked what were their biggest challenges they faced, the most frequently raised issue by far was parking (64% of respondents characterized this as a "major challenge"). This category includes lack of parking for the merchants and their employees, as well as for consumers; overly aggressive parking enforcement that made the shopping experience in Scarsdale unpleasant; and lack of parking enforcement for those who long overstayed the limit, and for merchants who parked at meters needed for consumers. This is consistent with the results of the Consumer Survey[6].

The merchants expressed specific and strong preferences regarding how to address either the lack of parking or issues concerning parking enforcement. The most popular recommendation is increasing the number of parking spaces: over 97% of the respondents said that more parking spaces would be "very useful" or "useful" to their business. More than 90% reported that allowing a six-minute grace period after the meter expiration would be "very useful" or "useful" to their business. The third most popular response -- electronic parking meters with a parking app (soon to be implemented by the Village) – was a distant third most popular response, with 64% of respondents in favor of this improvement.

The problem, as made clear from the data, is that according to the merchants, most of their customers drive to the Village Center, and most of those prefer to park at on-street meters. The problem is exacerbated because nearly 80% of Village Center employees also arrive downtown by car. While most employees park in garages, a significant portion park at the on-street meter spaces, competing for a finite number of meter spaces with the customers. A significant number of employees also park in residential neighborhoods.

[6] The Consumer Survey can be found at the Forum website: https://www.scarsdaleforum.org/single-post/2018/06/01/Scarsdale-Forum-Downtown-Revitalization-Committee-Survey-Yields-Over-1200-Responses.

However, the competition for meter spaces is at odds with consumers being able to park in the Village Center to shop locally, a result confirmed by the Consumer Survey.

The Committee concludes that devising creative solutions to these parking issues should be a priority to create a vibrant downtown economy. The Committee will study the issue in depth, including ways to improve managing the existing stock of metered parking and garage parking spaces for the benefit of both business customers and business employees. The Committee will also explore offering valet parking options.

1. Rents

The second leading challenge for downtown businesses was expensive rents (50% of respondents identified this as a "major challenge").[7] This is an issue between the merchants and their landlords as to which the Committee has no control; anecdotally, however, the Committee has been advised that Village Center landlords are amenable to negotiating with prospective merchants on the rent issue. The Committee can conduct further research as to rents in neighboring communities.

2. Online shopping

The third leading challenge, identified by approximately 31% of respondents, was Internet shopping. This data may be contrary to that reported in various publications about Internet shopping destroying downtowns.[8] However, for merchants in the Scarsdale Village Center, the problem does not appear to be as acute as in some communities.

Downtown merchants seem to be countering this trend by offering an online presence to preview their merchandise, order products on line and otherwise complement the in-store experience.[9] Indeed, studies from the second half of 2018 show that customers are increasingly being drawn to brick-and-mortar stores that offer excellent customer service or an "experience"[10] – a finding that is consistent with the survey data that shows nearly 40% of respondents reported that Internet shopping presented "no challenge" to their business prospects. It should be noted that although a majority of Scarsdale Village Center merchants did not feel that online shopping was an issue for them, nearly one-third of respondents (31%) were troubled by this factor.[11]

3. Increased retail options

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[7] See, e.g., the opinion piece, "No Shop Around the Corner," *The New York Times*, Nov. 20, 2017 at A 22, describing how certain trendy neighborhoods in New York City are "blighted" by "For Lease" signs, with the high rate of empty storefronts blamed on landlords seeking exorbitant rents. Suggestions to counter this problem were a restructuring in commercial rent tax, or a "vacancy tax," both of which would require legislation from Albany.

[8] CityLab from *The Atlantic*, April 13, 2017, at https://www.citylab.com/life/2017/04/whats-causing-the-retail-meltdown-of-2017/522600/, which listed shopping on Amazon.com as a major explanation for the demise of retail shopping in America.

[9] Even hair salons and nail salons, which by definition require an in-store visit, have websites for booking appointments and seeing the range of services.

[10] See, e.g., Vend's Retail Trends and Predictions 2019 at https://www.vendhq.com/retail-trends-and-predictions: "People still crave great service, so we'll see customer service go back to its roots — even shoppers who love everything high tech still want to talk with knowledgeable store associates who can help them make the right decision."

[11] The data shows that as a general matter, businesses that primarily offer services – such as salons, restaurants, dry cleaners and banks – indicated that online shopping posed little challenge to their businesses while purveyors of goods – such as jewelry, apparel and gift – reported that online shopping posed a major challenge. Still, there were exceptions, so one could not conclude that goods versus services would be predictive of the response. Overall, the data shows that Village Center merchants overall seem to be adapting well to the challenge of online shopping.

The lack of retail diversity was another common theme: 85% of respondents said that greater diversity in retail offerings would be "very useful" or "useful" to their business. Similar to the results in the Consumer Survey, the Village Center merchants would like to see more restaurants, with 73% opining that this would be "very useful" or "useful" to their business prospects.

Other requests were for cultural events spaces such as those hosting performance arts, art galleries, exhibits and concerts (63%); a farmers' market (62%)[12]; and activities and events for families with young children (59%). Although this is an issue for landlords in seeking out specific types of tenants, there is a better likelihood of renting to these desired tenants if the landlords know that merchants and consumers would support these types of businesses.

4. Other findings

Scarsdale Village Center merchants expressed a strong desire to be kept informed of updates on other downtown projects and developments, with 79% requesting this type of information. Merchants also wanted customer feedback (67%) and advertising or marketing information (65%).

This raises some follow-up queries: What outlets are available for communicating this information? Only 20 businesses responding to the Merchant Survey reported being members of the Scarsdale Chamber of Commerce, and only 4 were members of the Rotary Club. Can a channel for disseminating such information be established, with publicity for matters affecting the business community posted in a single location that is readily accessible to the merchants?

The Scarsdale Business Alliance created in 2018 and after the Merchant Survey was concluded, may fill this need. However, based on the Merchant Survey results, 46 of the 67 respondents of this question would spend up to $250 per year to belong to a chamber of commerce type organization, 19 would spend $250-$500, and 2 respondents would spend over $500.[13]

Detailed Results

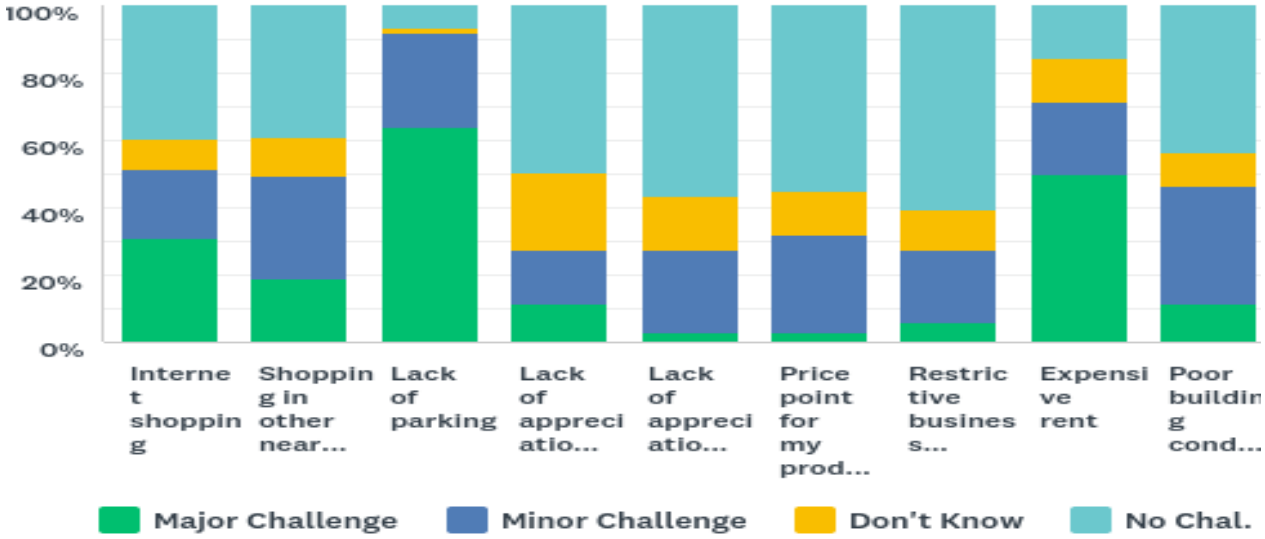
The charts on the following pages display the quantitative details of the response to the major questions in the Merchant Survey.

[12] At the time the Merchant Survey was taken, there was a farmers' market in operation at Boniface Circle, on Thursdays between 11 a.m. and 4 or 5 p.m., depending on the season.
[13] The cost of joining the Small Business Alliance is $500 per year.

Needs and Opportunities Assessment

Q1: Please rate the degree to which you are experiencing the following business challenges?

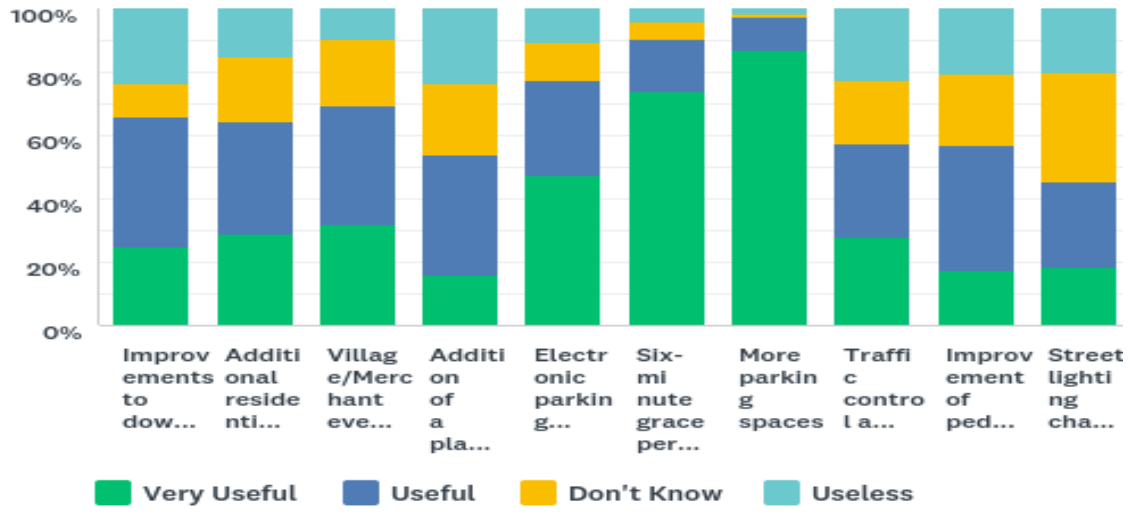
	Major Challenge	Minor Challenge	Don't Know	No Challenge	Total
Internet shopping	30.88% 21	20.59% 14	8.82% 6	39.71% 27	68
Shopping in other nearby business districts	18.84% 13	30.43% 21	11.59% 8	39.13% 27	69
Lack of parking	64.00% 48	28.00% 21	1.33% 1	6.67% 5	69
Lack of appreciation of merchant knowledge/expertise	11.59% 8	15.94% 11	23.19% 16	49.28% 34	69
Lack of appreciation of merchandise quality	2.90% 2	24.64% 17	15.94% 11	56.52% 39	69
Price point for my products is too high	2.90% 2	28.99% 20	13.04% 9	55.07% 38	69
Restrictive business regulations	6.06% 4	21.21% 14	12.12% 8	60.61% 40	66
Expensive rent	50.00% 35	21.43% 15	12.86% 9	15.71% 11	70
Poor building condition	11.59% 8	34.78% 24	10.14% 7	43.48% 30	69



The lack of parking was identified by the merchants responding to the survey as the overwhelming obstacle to doing business in the downtown. Combining both major and minor challenges, merchants scored lack of parking at 92%. It was followed by expensive rent at 71%, Internet shopping at 51%, shopping in other nearby business districts at 49%, and poor building conditions at 46%.

Q2: How useful would these potential Village Center changes be to your business?

	Very Useful –	Useful –	Don't Know –	Useless –	Total –
Improvements to downtown landscaping	25.00% 19	40.79% 31	10.53% 8	23.68% 18	76
Additional residential downtown apartments	28.77% 21	35.62% 26	20.55% 15	15.07% 11	73
Village/Merchant event partnership using public spaces	32.00% 24	37.33% 28	21.33% 16	9.33% 7	75
Addition of a playground to Chase Park (more family traffic)	15.79% 12	38.16% 29	22.37% 17	23.68% 18	76
Electronic parking meters/parking app	47.37% 36	30.26% 23	11.84% 9	10.53% 8	76
Six-minute grace period on parking meters	73.97% 54	16.44% 12	5.48% 4	4.11% 3	73
More parking spaces	87.01% 67	10.39% 8	1.30% 1	1.30% 1	77
Traffic control and enforcement	28.00% 21	29.33% 22	20.00% 15	22.67% 17	75
Improvement of pedestrian walkways	17.57% 13	39.19% 29	22.97% 17	20.27% 15	74
Street lighting changes	18.67% 14	26.67% 20	34.67% 26	20.00% 15	75



The lack of parking was again highlighted in this question wherein 97% of the respondents found an increase in parking spaces and 90% found a six minute parking grace period to be very useful or useful.

Q3: What new businesses and services located in the Village Center would attract customers and also help your business grow?

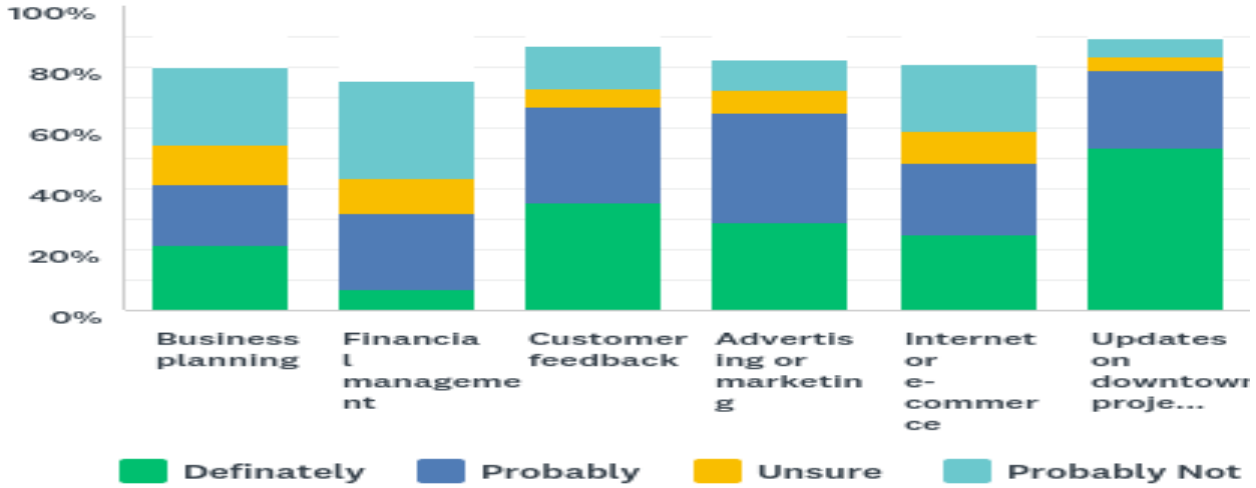
	Very Useful	Useful	Don't Know	Useless	Total
Additional restaurants	40.54% 30	32.43% 24	13.51% 10	13.51% 10	74
More hair salons, nail salons, spa services	4.11% 3	13.70% 10	24.66% 18	57.53% 42	73
Greater variety of retail stores	47.30% 35	37.84% 28	9.46% 7	5.41% 4	74
Farmers' market	18.92% 14	43.24% 32	25.68% 19	12.16% 9	74
More children's stores	12.50% 9	23.61% 17	45.83% 33	18.06% 13	72
Cultural events spaces (performance arts, art galleries, exhibits, concerts)	27.40% 20	35.62% 26	27.40% 20	9.59% 7	73
Activities and events for families with preschool and school-age children	22.22% 16	37.50% 27	25.00% 18	15.28% 11	72
Community center (e.g., JCC or YMCA)	14.08% 10	30.99% 22	39.44% 28	15.49% 11	71
Additional public common areas/parks	19.44% 14	30.56% 22	33.33% 24	16.67% 12	72
Exercise studios	13.89% 10	31.94% 23	37.50% 27	16.67% 12	72
Offering a % of sales reward at checkout toward a local charity or cause	5.33% 4	28.00% 21	38.67% 29	28.00% 21	75

Eighty-five percent of the respondents found a greater variety of retail stores to be very useful or useful. This was followed by 73% of the merchants responding to the survey finding additional restaurants to very useful or useful. The sentiment was echoed in *Q4: Name two businesses you would most like to see come to downtown Scarsdale:* (72 mentions from 55 respondents) Answers fell into the following categories.

Restaurants	23	32%	Specialty Foods	13	18%
Shoe Store	10	14%	Multiple other types	26	36%

Q5: Could you or your employees use information on or assistance with the following topics?

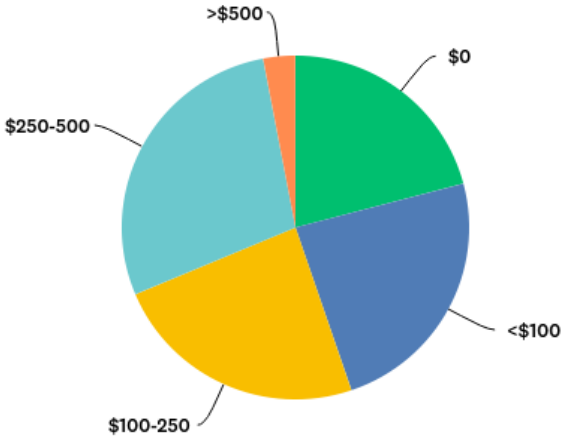
–	Definitely	Probably	Unsure	Probably Not	Definitely Not	Total
Business planning	21.43% 15	20.00% 14	12.86% 9	25.71% 18	20.00% 14	70
Financial management	7.25% 5	24.64% 17	11.59% 8	31.88% 22	24.64% 17	69
Customer feedback	35.71% 25	31.43% 22	5.71% 4	14.29% 10	12.86% 9	70
Advertising or marketing	28.99% 20	36.23% 25	7.25% 5	10.14% 7	17.39% 12	69
Internet or e-commerce	25.00% 17	23.53% 16	10.29% 7	22.06% 15	19.12% 13	68
Updates on downtown projects e.g., Freightway,	53.73% 36	25.37% 17	4.48% 3	5.97% 4	10.45% 7	67



Seventy-nine percent of respondents definitely or probably desired more information on downtown projects and developments. Marketing data was also desired with 67% of the merchants surveyed wanting customer additional feedback and 65% wanting advertising or marketing information or assistance.

Q6: Assuming a Chamber of Commerce fulfilled the needs important to you in Q5, how much would you be willing to contribute to such a Chamber of Commerce or similar organization per year?

Answer Choices	**–Responses –**	
$0	20.90%	14
<$100	23.88%	16
$100-250	23.88%	16
$250-500	28.36%	19
>$500	2.99%	2
TOTAL		67

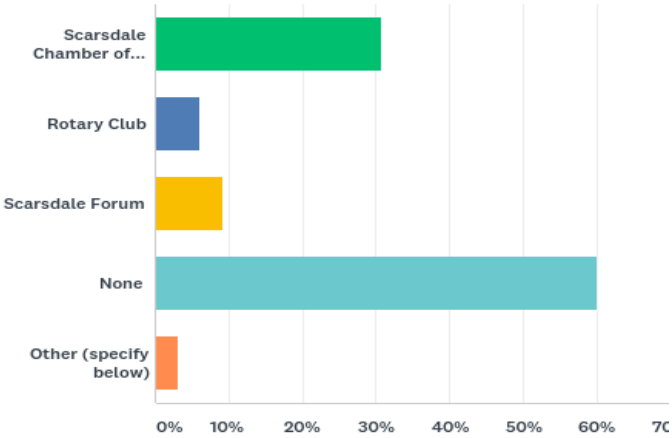


Despite wanting more information about the Village and customers, those merchants who responded to the survey do not expect much value from a Chamber of Commerce or similar organization. Only 31% of those merchants would be willing to spend $250 or more for such services.

Q7: Are you currently a member of the Scarsdale Chamber of Commerce, Rotary Club, Scarsdale Forum or similar organization and if so which ones?

Answer Choices –	**Responses** –
– Scarsdale Chamber of commerce	30.77% 20
– Rotary Club	6.15% 4
– Scarsdale Forum	9.23% 6
– None	60.00% 39
– Other (specify below)	3.08% 2

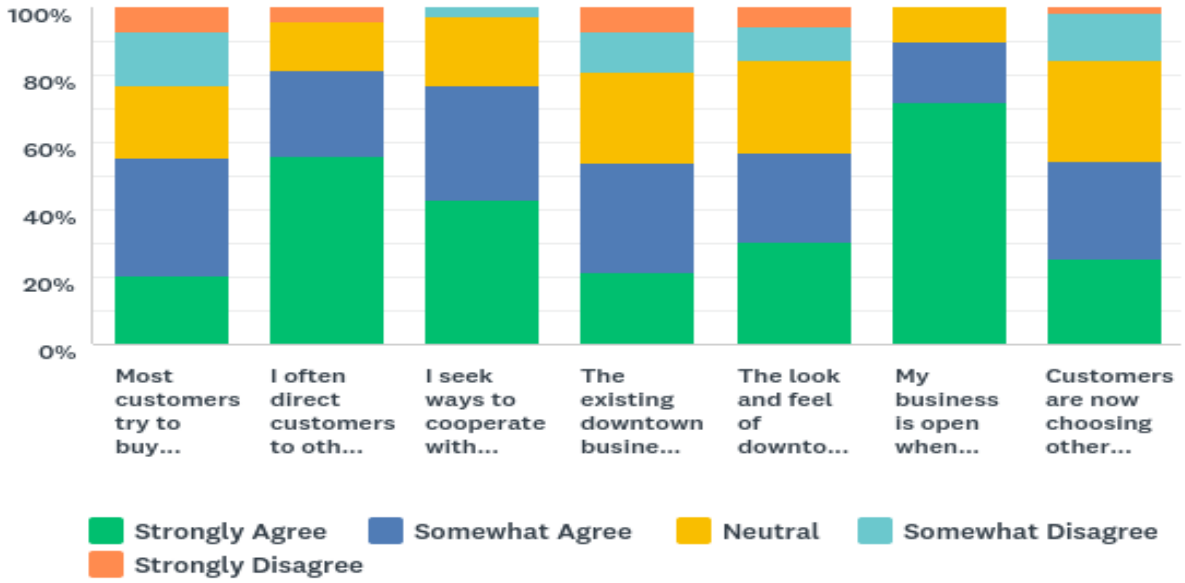
Total Respondents: 65



Only 31% of the respondents were members of the Scarsdale Chamber of Commerce. They also had very low participation in other civic organizations.

8: How strongly do you agree or disagree with the following statements?

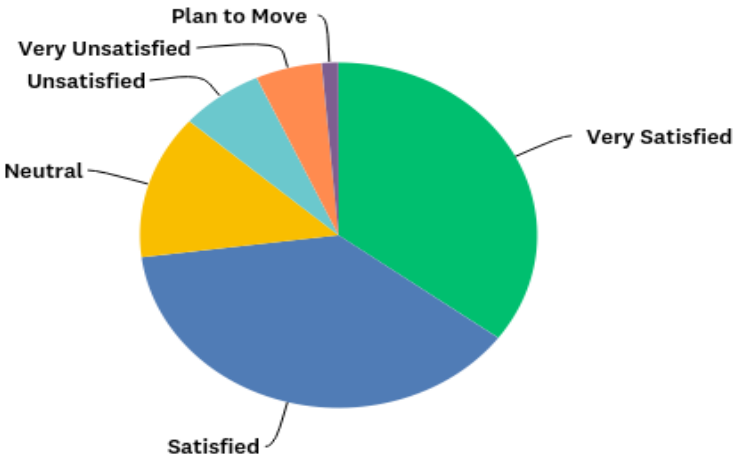
	Strongly Agree –	Somewhat Agree –	Neutral –	Somewhat Disagree –	Strongly Disagree –	Total –
Most customers try to buy products and services locally.	20.27% 15	35.14% 26	21.62% 16	16.22% 12	6.76% 5	74
I often direct customers to other downtown businesses.	56.00% 42	25.33% 19	14.67% 11	0.00% 0	4.00% 3	75
I seek ways to cooperate with complementary downtown businesses.	43.24% 32	33.78% 25	20.27% 15	2.70% 2	0.00% 0	74
The existing downtown business mix helps my business.	21.62% 16	32.43% 24	27.03% 20	12.16% 9	6.76% 5	74
The look and feel of downtown helps my business.	30.56% 22	26.39% 19	27.78% 20	9.72% 7	5.56% 4	72
My business is open when customers want to shop.	71.83% 51	18.31% 13	9.86% 7	0.00% 0	0.00% 0	71
Customers are now choosing other business districts.	25.71% 18	28.57% 20	30.00% 21	14.29% 10	1.43% 1	70



Over 90% of the respondents strongly or somewhat agree that their business is open when customers want to shop. 81% likewise agree that they direct customers to other downtown merchants and 77% agree that they seek ways to cooperate with complementary downtown businesses.

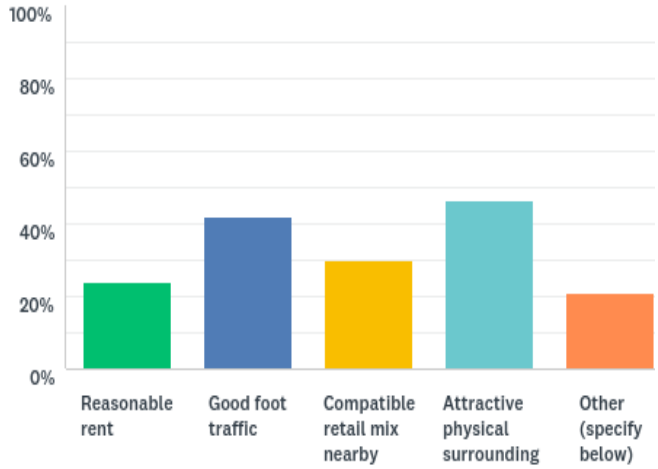
Q9a: How satisfied are you with the present location of your business?

Answer Choices	**–Responses –**	
Very Satisfied	35.14%	26
Satisfied	37.84%	28
Neutral	13.51%	10
Unsatisfied	6.76%	5
Very Unsatisfied	5.41%	4
Plan to Move	1.35%	1
TOTAL		74



Q9b: Why?

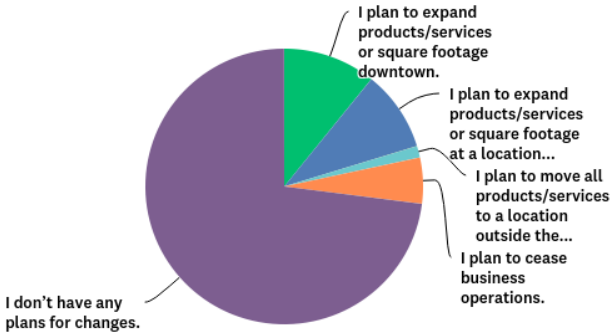
Answer Choices –	**Responses** –	
Reasonable Rent	23.88%	16
Good foot traffic	41.79%	28
Compatible retail mix nearby	29.85%	20
Attractive physical surroundings	46.27%	31
Other (specify below)	22.39%	15
Total Respondents:		67



Approximately 73% of the merchants who responded to the survey are satisfied or very satisfied with the location of their business. More importantly, very few (14%) are unsatisfied or plan to move. Attractive physical surroundings and good foot traffic seemed to be responsible for this overall satisfaction.

Q10: Do you have plans to expand, reduce or move operations for your business in the foreseeable future?

Answer Choices –	Responses –	
I plan to expand product/services or square footage downtown	10.81%	8
I plan to expand product/services or square footage at a location outside the downtown	9.46%	7
I plan to reduce product/services or square footage downtown	0%	0
I plan to move all product/services outside the downtown	1.35%	1
I plan to cease business operations	5.41%	4
I don't have any plans for changes	27.29%	54
Total Respondents:		74



The number of businesses seeking to expand (20%) exceeds the number of businesses planning to move or cease operations (7%). This question when viewed in conjunction with Q9a and Q24 confirms that the downtown businesses are reasonably healthy.

Q11: Are there any building enhancements or renovations that would assist in improving your business?

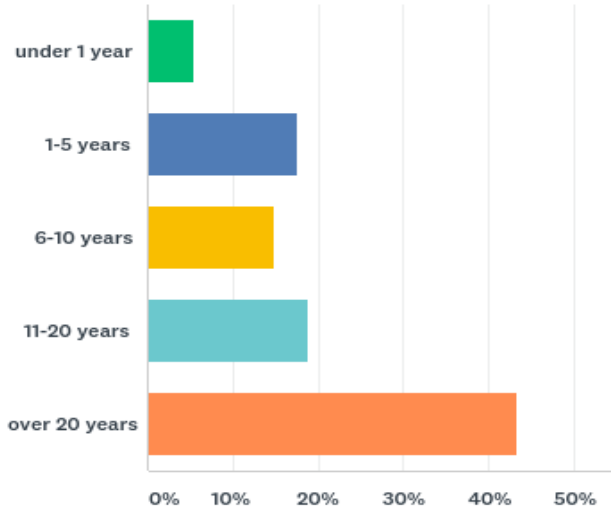
(Word Cloud from 36 Respondents)

Not surprisingly, parking is again predominant. Handicap accessibility emerges for the first time as well as a desire for new construction.

Business and Workforce Data

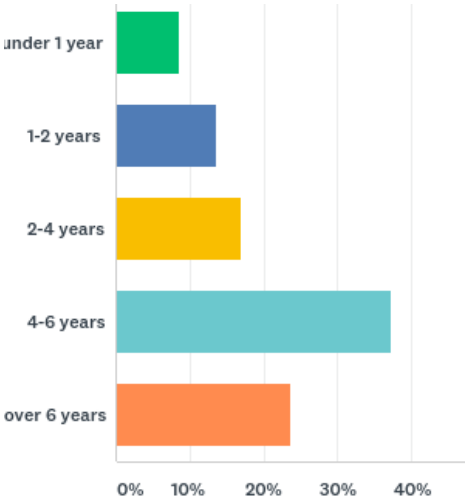
Q12: How long has your business been in operation?

Answer Choices	– Responses –	
Under 1 year	5.41%	4
1-5 years	17.57%	13
6-10 years	14.86%	11
11-20 years	18.92%	14
Over 20 years	43.24%	32
TOTAL		67



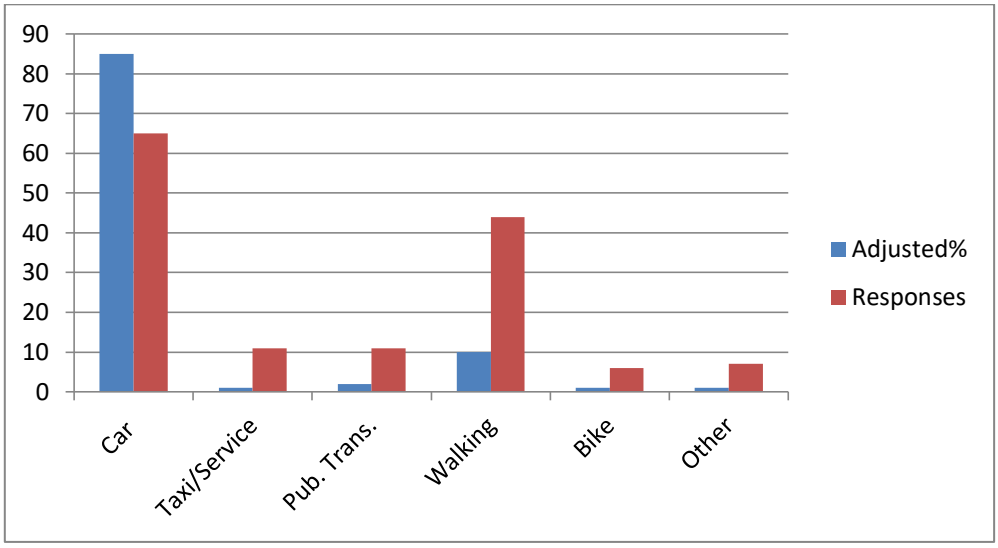
Q13: How many years are left on your lease?

Answer Choices	Responses	
Under 1 year	5.41%	4
1-2 years	17.57%	13
2-4 years	14.86%	11
4-6 years	18.92%	14
Over 6 years	43.24%	32
TOTAL		67



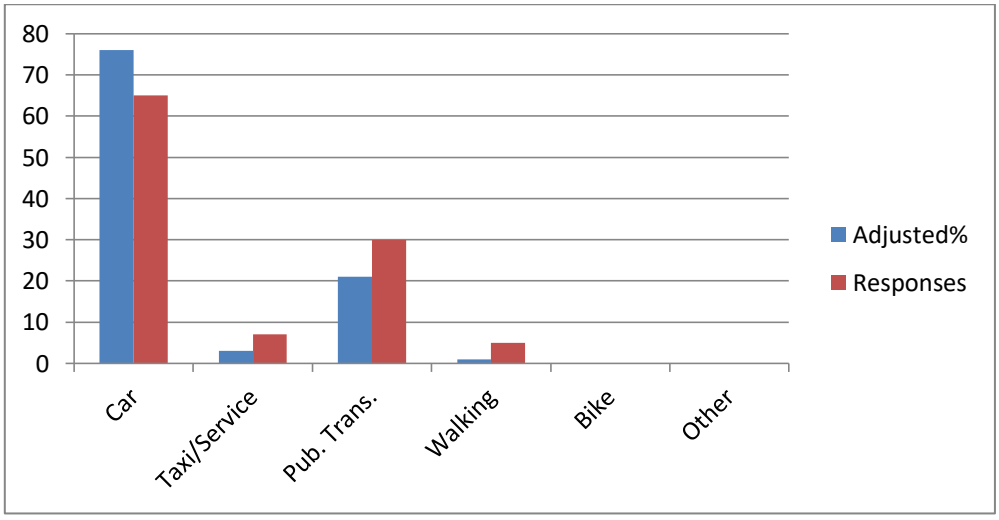
As pointed out in question nine, existing merchants who responded to the survey are satisfied with their downtown business locations and don't plan to move. This is further evidenced by the long tenure of existing businesses and the average remaining term of their leases. The survey shows that 62% of those merchants have been in business for more than ten years and over 62% have four or more years left on their leases.

Q14: How do your customers get to your business?



Adjusted %	85	1	2	10	1	1
Responses	65	11	11	44	6	7

Q18: How do your employees get to your business?



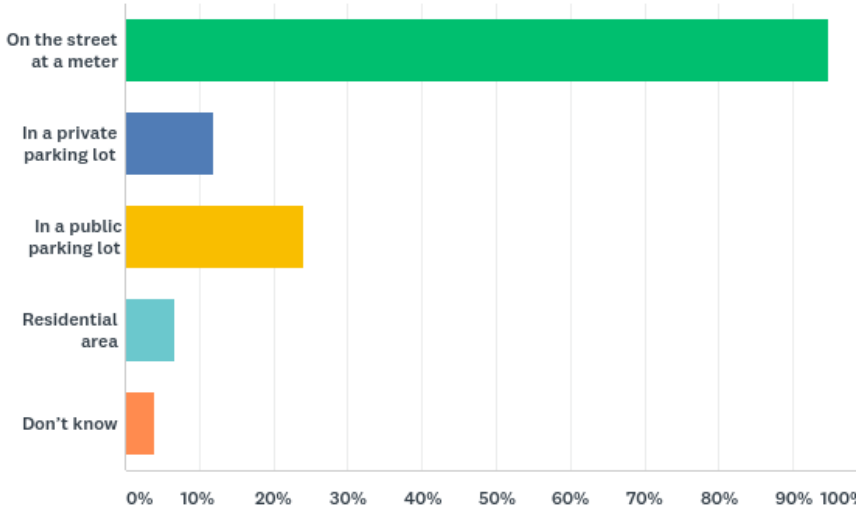
Adjusted %	76	3	21	1	0	0
Responses	65	7	30	1	0	0

Merchants reported in response to the survey that approximately 80% of their customers and employees use cars to get to their businesses, which helps explain a significant source of the parking shortage. [14]

[14] Weighted percentage reflects that respondents attributing no score to a category were implicitly indicating that no customer/employees used that form of transport to get to the business. The weighted overall percentage includes the universe of actual and implicit responses less those that didn't know.

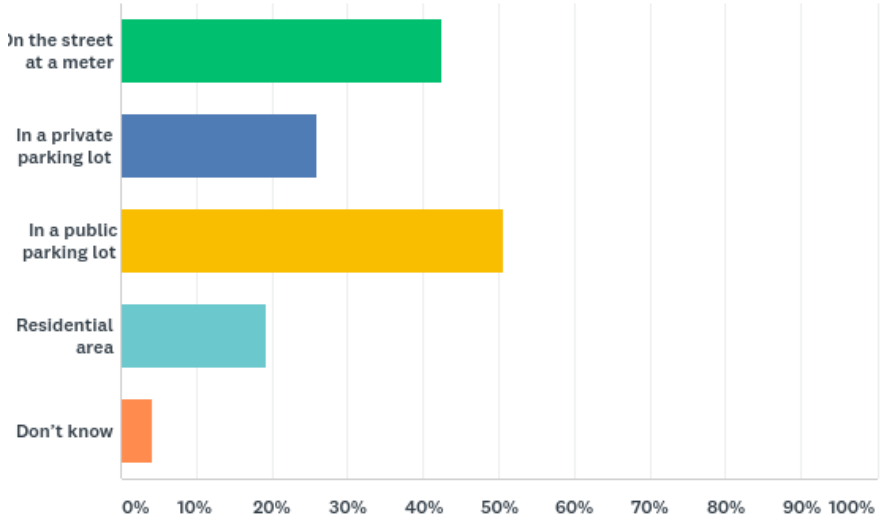
Q15: To the extent your customers drive to your business, where do they park?

Answer Choices	**– Responses –**	
On the street at a meter	94.67%	71
In a private parking lot	12.00%	9
In a public parking lot	24.00%	18
Residential area	6.67%	5
Don't know	4.00%	3
Total Respondents 72		



Q19: To the extent your employees drive to work, where do they park?

Answer Choices	**– Responses –**	
On the street at a meter	42.47%	31
In a private parking lot	26.03%	19
In a public parking lot	50.68%	37
Residential area	19.18%	14
Don't know	4.11%	3
Total Respondents 73		

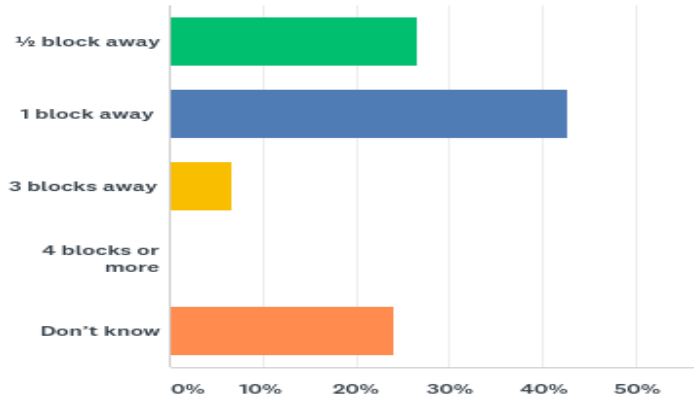


The merchants surveyed responded that customers overwhelmingly seek to park at meters (95%) and to a lesser extent in public and private parking lots (36%)[15]. They believe that their employees usually seek to park in garages (77%) but also park at meters (42%). Interestingly, employees were reported to also park in residential areas (19%).

[15] Although the Merchant Survey did not seek specific information on the private parking lots used, some merchants mentioned that they or some of their employees park at Scout Field on Wayside Lane, Village Hall, Trinity Lutheran Church on Crane Road, and the Shell gas station on Scarsdale Avenue.

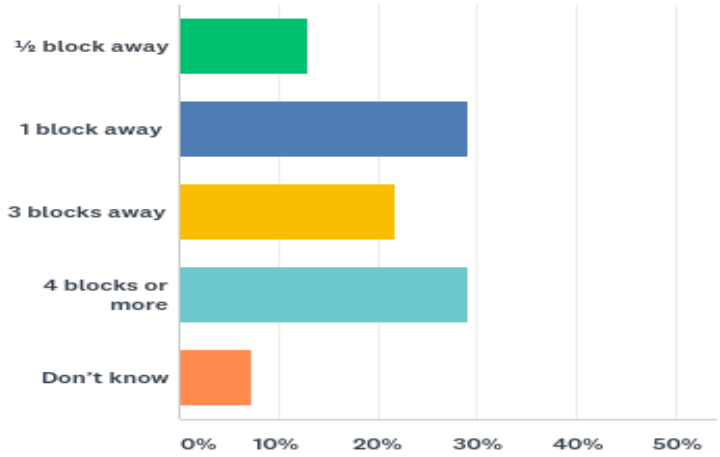
Q16: How far do your customers typically park from your business?

Answer Choices	Responses	
½ block away	26.67%	20
1block away	42.67%	32
3 blocks away	6.67%	5
4 blocks away	00.00%	0
Don't know	24.11%	18
Total Respondents		75



Q20: How far do your employees typically park from your business?

Answer Choices	Responses	
½ block away	13.04%	9
1block away	28.99%	20
3 blocks away	21.74%	15
4 blocks away	28.99%	20
Don't know	7.25%	5
Total Respondents		75



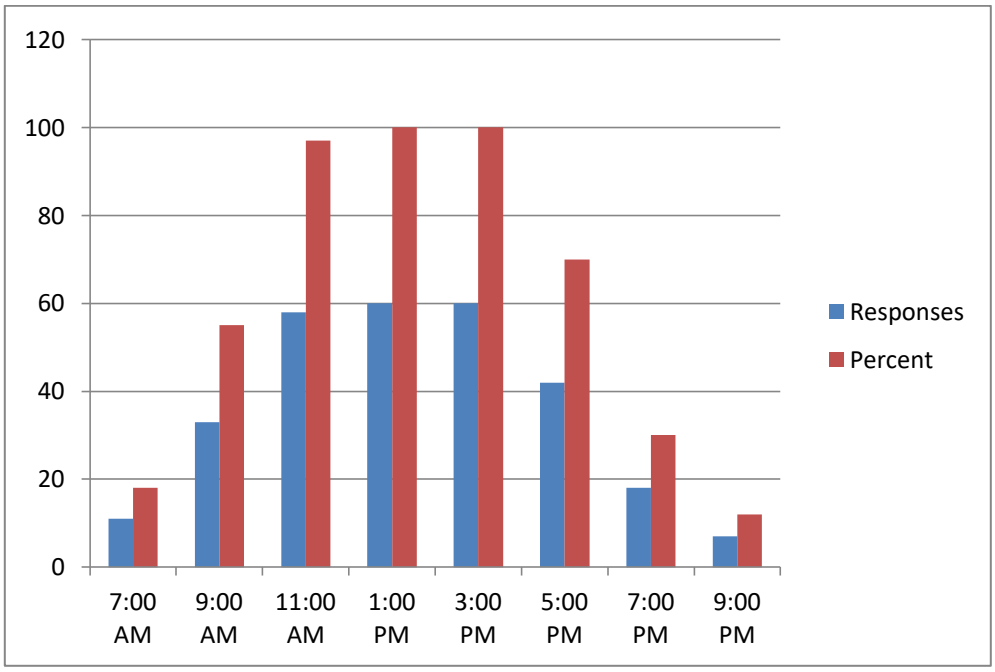
The data shows that merchants reported that their customers seek to park within one block of a business (69%) while employees tend to park further away.

Q17: Approximately how many employees work at your business on a typical day?(Total Respondents 63)

Employees	**- Responses –**		**Employees**	**- Responses**
1-3	44.44%	28	10-20	14.28%
5-10	38.09%	24	>20	3.17%

Market and Marketing Data

Q21: What are the hours of operation for your business?



22: During a typical week, what are the busiest times for your business?

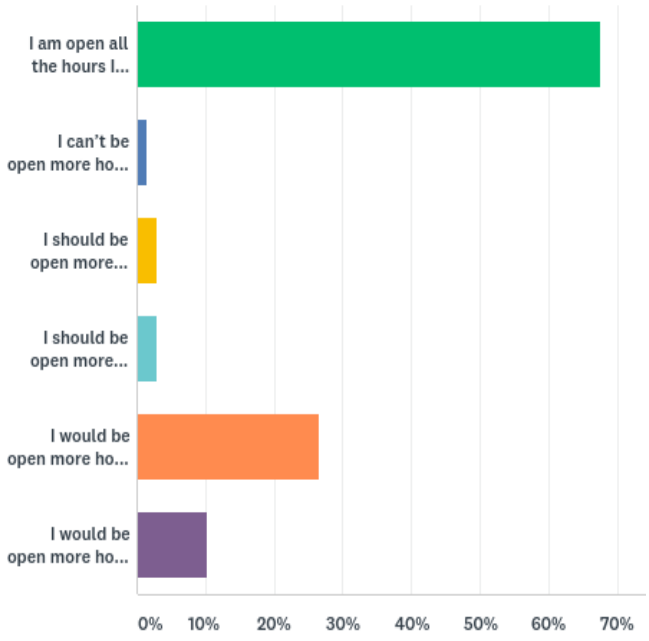
–	Before 11:00am	11:00am - 2:00pm	2:00pm - 5:00pm	After 5:00pm	Total Respondents
Monday	34.62% 18	38.46% 20	34.62% 18	25.00% 13	**52**
Tuesday	30.51% 18	45.76% 27	38.98% 23	20.34% 12	59
Wednesday	34.43% 21	45.90% 28	40.98% 25	19.67% 12	61
Thursday	26.98% 17	46.03% 29	39.68% 25	20.63% 13	63
Friday	27.69% 18	44.62% 29	46.15% 30	21.54% 14	65
Saturday	36.92% 24	61.54% 40	43.08% 28	27.69% 18	65

Most businesses are open between 11:00a.m. and 3p.m. This correlates with the busiest times for these business, which is between 11 a.m. and 2 p.m. each day. 68% of businesses report Saturday as the busiest day, with Monday being the least busy at 38%. [16]

[16] The number of merchants open on Sunday was too small to obtain useful information.

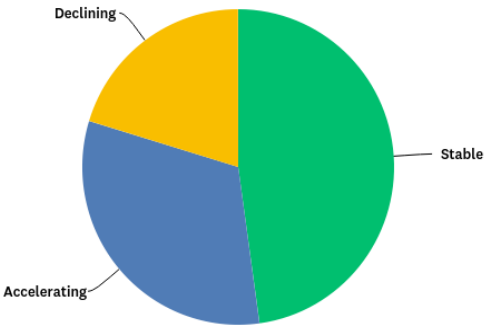
Q23: What are your thoughts on store hours?

Answer Choices –	Responses –
I am open all the hours I need to be	67.65% 46
I can't be open for more hours for personal reasons	1.47% 1
I should be open for more hours, but can't afford the staff	2.94% 2
I should be open more hours, but can't find good staff	2.94% 2
I would be open for more hours if I were sure of sales	26.47% 18
I would be open for more hours if everyone else were	10.29% 7
Total Respondents: 68	68



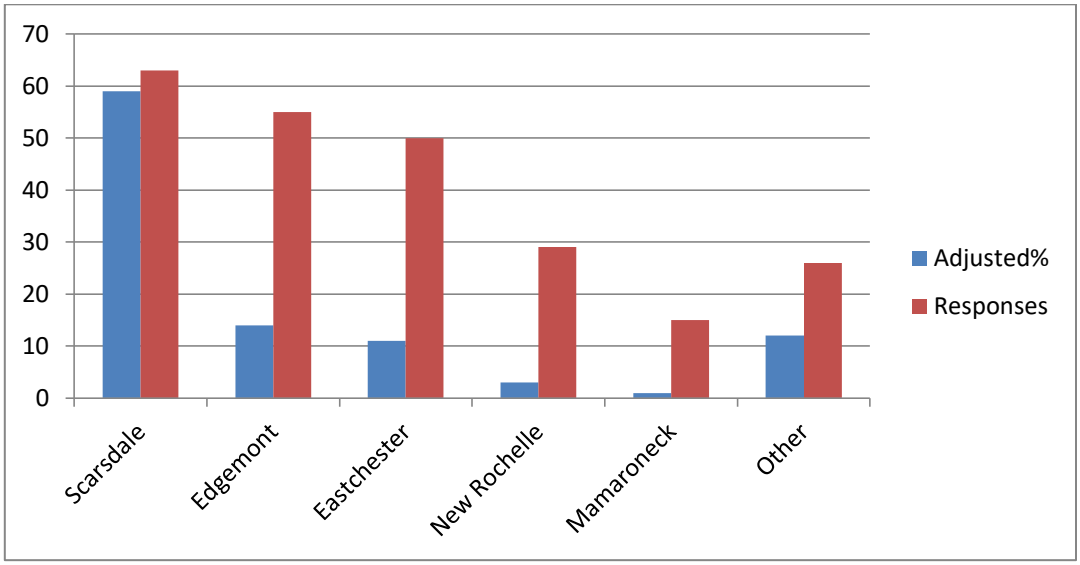
Q24: How would you characterize the health of your business?

Answer Choices –	Responses –
Stable	47.83% 33
Accelerating	31.83% 22
Declining	20.29% 14



Eighty percent of businesses surveyed reported the health of their business to be stable or accelerating. 20% reported their business to be declining. 68% of the businesses felt they were open at appropriate times. A few felt they should be open more often and 26% would be open more if they were sure of sales.

Q25: Approximately what percentages of your customers come from each of the following towns?

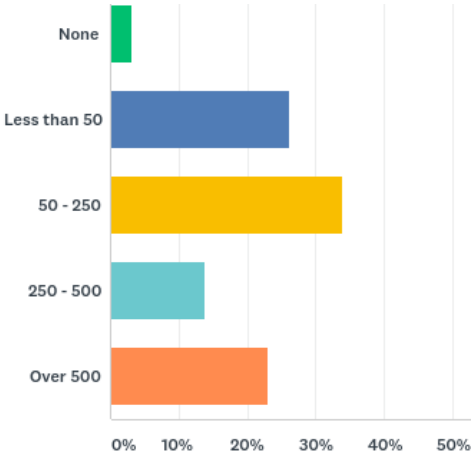


Adjusted %	59	14	11	3	1	12
Responses	63	55	50	29	15	26

Responding merchants reported that the bulk (59%) of Scarsdale downtown customers come from Scarsdale with 28% coming from towns abutting Scarsdale. In the "Other" category, the 26 respondents mentioned other nearby towns such as Ardsley, Rye, and White Plains.

Q26: How many customers/clients visit your business per week?

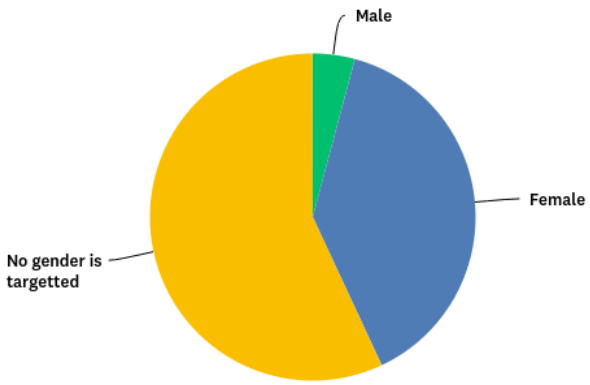
Answer Choices –	Responses	
None	3.08%	2
Less than 50	26.15%	17
50-250	33.85%	22
250-500	13.85%	9
Over 500	23.08%	15
Total Respondents:	65	



Looking at the underlying data, the businesses with over 250 customers were largely food establishments, restaurants and volume retailers such as gas stations.

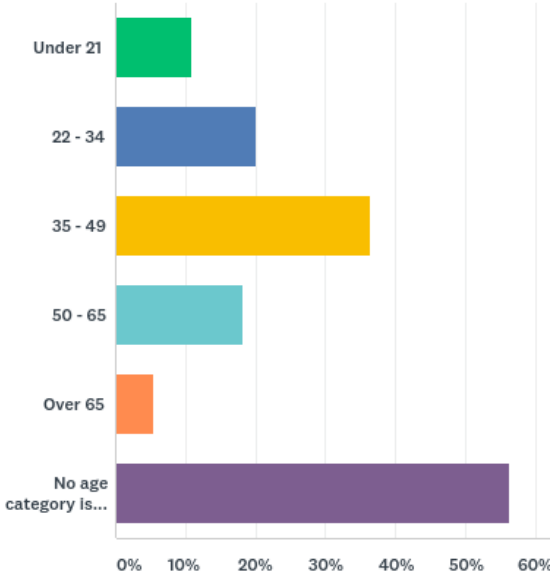
Q27a: Please describe the target market of your business. (Gender)

Answer Choices –	Responses	
Male	4.17%	3
Female	38.89%	28
No gender is targeted	56.94%	41
Total Respondents:		72



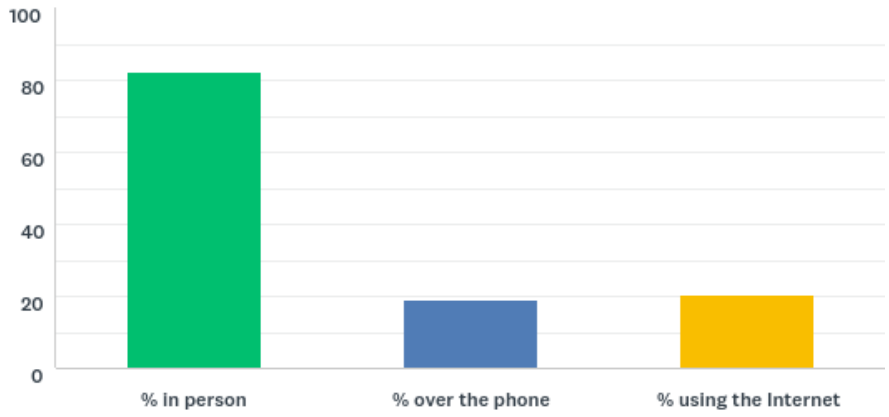
Q27b: Please describe the target market of your business. (Age)

Answer Choices –	Responses	
Under 21	10.91%	6
22-34	20.00%	11
35-49	36.36%	20
50-65	18.18%	10
Over 65	5.45%	3
No age category is Targeted	56.36%	31
Total Respondents:		55



The most attractive target market appears to be consumers in general (having no specific gender or age), and then females and also consumers aged 35-49.

Q28: Approximately what percentage of your business sales are done in person, over the phone or using the internet?



Average#	82	19	20
Response#	72	47	28

Most businesses in downtown Scarsdale rely on in-person sales. Please note that in Q1 Internet shopping was considered a challenge by 51% of the businesses, and not a challenge by 40%. The amount of business done over the Internet will likely increase for a number of Scarsdale merchants.

Q29: Do you have other feedback that you would like to share?

(Word cloud from 35 respondents)

Parking is again heavily mentioned along with derivative parking issues such as meters, free parking and enforcement. Improvement to pedestrian space is a minor sub-theme.

Respectfully submitted by the following members of the Downtown Revitalization Committee:

Susan Douglass, Chair
Beth Altschuler
Linda Blair
K. Scott Douglass
Madelaine Eppenstein
Thomas Giordano
Judy Hamra
Alexander Harrison
Robert Harrison
Terri Harrison
Sital (Sal) Jain
Brice Kirkendall-Rodriguez
Mayra Kirkendall-Rodriguez
Renu Lalwani
Barry Meiselman
Edward A. Morgan
B. Kathleen Munguia
David Peretz
ML Perlman
Richard Pinto
Kenneth Rilander
Lisa VanGundy

Exhibit A

Copy of the Merchant Survey

SCARSDALE FORUM
Our Community Voice

Thank you for taking the time to meet with me.

The Scarsdale Forum's Downtown Revitalization Committee has been formed to study and then recommend ways to grow and sustain vibrancy in our Village center. Merchants are important stakeholders and we need your help.

This survey provides an opportunity for you to tell us about your business and your business assistance needs. The data gathered for this survey will not be attributed to any specific business or person, so please be candid. We will have the survey results analyzed and use the information as the cornerstone of our business retention study.

We appreciate your time. Key findings will be reported to you as soon as they are available.

Interviewer _____ Date:_____

Business Name _____

Business Owner(s) _____ **Contact:** _____

Interviewee_____ **Title:**_____

Business Mailing Address _____

Business Phone #1_____ **Business Phone #2** _____

Email _____ **Web Site** _____

Type of Business_____

1. Please rate the degree to which you are experiencing the following business challenges? (● mark ONE answer for each item)

	Major Challenge	Minor Challenge	Don't Know	No Challenge
Internet shopping	☐	☐	☐	☐
Shopping in other nearby business districts	☐	☐	☐	☐
Lack of parking	☐	☐	☐	☐
Lack of appreciation of merchant knowledge/expertise	☐	☐	☐	☐
Lack of appreciation of merchandise quality	☐	☐	☐	☐
Price point for my products is too high	☐	☐	☐	☐
Restrictive business regulations	☐	☐	☐	☐
Expensive rent	☐	☐	☐	☐
Poor building condition	☐	☐	☐	☐
Other _____	☐	☐	☐	☐

Additional comments (record here):

2. How useful would these potential Village Center changes be to your business? (● mark ONE answer for each item)

	Very Useful	Useful	Don't Know	Useless
Improvements to downtown landscaping	☐	☐	☐	☐
Additional residential downtown apartments	☐	☐	☐	☐
Village/Merchant event partnership using public spaces	☐	☐	☐	☐
Addition of a playground to Chase Park (increasing family traffic)	☐	☐	☐	☐
Electronic parking meters/parking app	☐	☐	☐	☐
Six-minute grace period on parking meters	☐	☐	☐	☐
More parking spaces	☐	☐	☐	☐
Traffic control and enforcement	☐	☐	☐	☐
Improvement of pedestrian walkways	☐	☐	☐	☐
Street lighting changes	☐	☐	☐	☐
Other_____	☐	☐	☐	☐

Additional comments (record here):

3. What new businesses and services located in the Village Center would attract customers and also help your business grow?

(● mark ONE answer for each item)

	Very Useful	Useful	Don't Know	Useless
Additional restaurants	☐	☐	☐	☐
More hair salons, nail salons, and spa services	☐	☐	☐	☐
Greater variety of retail stores	☐	☐	☐	☐
Farmers' market	☐	☐	☐	☐
More children's stores	☐	☐	☐	☐
Cultural events spaces (performance arts, art galleries, exhibits, concerts)	☐	☐	☐	☐
Activities and events for families with preschool and school-age children	☐	☐	☐	☐
Community center (e.g., JCC or YMCA)	☐	☐	☐	☐
Additional public common areas/parks	☐	☐	☐	☐
Exercise studios	☐	☐	☐	☐
Offering a % of sales reward at checkout toward a local charity or cause	☐	☐	☐	☐
Other _____	☐	☐	☐	☐

Additional comments (record here):

4. Name two businesses you would most like to see come to downtown Scarsdale. (i.e., a specific type of business, or a specific chain or franchise).

a. _____ b. _____

5. Could you or your employees use information on or assistance with the following topics? (*Typically provided by a Chamber of Commerce or similar organization)* (● mark ONE answer for each item)

	Definitely	Probably	Unsure	Probably Not	Definitely Not
Business planning	☐	☐	☐	☐	☐
Financial management	☐	☐	☐	☐	☐
Customer feedback	☐	☐	☐	☐	☐
Advertising or marketing	☐	☐	☐	☐	☐
Internet or e-commerce	☐	☐	☐	☐	☐
Updates on downtown projects (e.g., Freightway, parking, residential apartments)	☐	☐	☐	☐	☐
Other _____	☐	☐	☐	☐	☐

Additional comments (record here):

6. Assuming a Chamber of Commerce fulfilled the needs important to you in Q5, how much would you be willing to contribute to such a Chamber of Commerce or similar organization per year? (● mark ONE answer)

$0	<$100	$100-250	$250-500	>$500
☐	☐	☐	☐	☐

7. Are you currently a member of the Scarsdale Chamber of Commerce, Rotary Club, Scarsdale Forum or similar organization and if so which ones? (● mark EACH organization to which you belong)

☐ Scarsdale Chamber of Commerce ☐ Rotary Club ☐ Scarsdale Forum ☐ None
☐ Other: _____

8. How strongly do you agree or disagree with the following statements? (● mark ONE answer for each statement)

	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
Most customers try to buy products and services locally.	☐	☐	☐	☐	☐
I often direct customers to other downtown businesses.	☐	☐	☐	☐	☐
I seek ways to cooperate with complementary downtown businesses.	☐	☐	☐	☐	☐
The existing downtown business mix helps my business.	☐	☐	☐	☐	☐
The look and feel of downtown helps my business.	☐	☐	☐	☐	☐
My business is open when customers want to shop.	☐	☐	☐	☐	☐
Customers are now choosing other business districts.	☐	☐	☐	☐	☐

9. How satisfied are you with the present location of your business? (● mark ONE)

☐ Very Satisfied ☐ Satisfied ☐ Neutral ☐ Unsatisfied ☐ Very Unsatisfied ☐ Plan to Move

Why? (● mark as many as applicable)

☐ Reasonable rent
☐ Good foot traffic
☐ Compatible retail mix nearby
☐ Attractive physical surroundings
☐ Other (record here):

10. Do you have plans to expand, reduce or move operations for your business in the foreseeable future? (● mark ONE)

☐ I plan to expand products/services or square footage downtown.
☐ I plan to expand products/services or square footage at a location outside the downtown.
☐ I plan to reduce products/services or square footage downtown.
☐ I plan to move all products/services to a location outside the downtown.
☐ I plan to cease business operations.
☐ I don't have any plans for changes.

11. Are there any building enhancements or renovations that would assist in improving your business?
(Record response):

12. How long has your business been in operation? (● mark ONE, include time at this & any previous locations)

☐ under 1 year ☐ 1-5 years ☐ 6-10 years ☐ 11-20 years ☐ over 20 years

If you know the date your business was established **in Scarsdale**, please list it here (MM / YY) _____

13. How many years are left on your current lease? (● mark ONE)

☐ under 1 year ☐ 1-2 years ☐ 2-4 years ☐ 4-6 years ☐ over 6 years

14. How do your <u>customers</u> get to your business (Total should equal 100%)

a. ___% by car
b. ___% by taxi or car service (e.g., Uber)
c. ___% by public transportation
d. ___% by walking
e. ___% by bicycling
f. ___% other (specify)
g. ___ Don't know
100%

15. To the extent your customers drive to your business, where do they park? (mark as many as applicable)

☐ On the street at a meter ☐ In a private parking lot ☐ Don't know
☐ In a public parking lot ☐ Residential area

16. How far do your customers typically park from your business? (● mark ONE)

☐ ½ block away ☐ 3 blocks away ☐ Don't know
☐ 1 block away ☐ 4 blocks or more

If you own a parking lot, how many parking spaces are available for customers (not employees)? _____

17. Approximately how many people (employees) work at your business on a typical day? _____

18. How do your employees get to your business (Total should equal 100%)

a. ___% by car
b. ___% by taxi or car service (e.g., Uber)
c. ___% by public transportation
d. ___% by walking
e. ___% by bicycling
f. ___% other (specify)
g. ___ Don't know
100%

19. To the extent your employees drive to your business, where do they park? (● mark as many as applicable)

☐ On the street at a meter
☐ In a private parking lot
☐ Don't know
☐ In a public parking lot
☐ Residential area

20. How far do your employees typically park from your business? (● mark ONE)

☐ ½ block away
☐ 3 blocks away
☐ Don't know
☐ 1 block away
☐ 4 blocks or more

If you own a parking lot, how many parking spaces are available for employees (not customers)? _____

21. What are the hours of operation for your business?

Weekdays from _____ to _____

Saturday from _____ to _____

Sunday from _____ to _____

23. What are your thoughts on store hours?

☐ I am open all the hours I need to be
☐ I can't be open more hours for personal reasons
☐ I should be open more hours, but can't afford the staff
☐ I should be open more hours, but can't find good staff
☐ I would be open more hours if I were sure of sales
☐ I would be open more hours if everyone else were

22. During a typical week, what are the busiest times for your business? (● mark up to SEVEN times total for the week)

	Before 11:00 a.m.	11:00 a.m.-2:00 p.m.	2:00 p.m.-5:00 p.m.	After 5:00 p.m.
Monday	☐	☐	☐	☐
Tuesday	☐	☐	☐	☐
Wednesday	☐	☐	☐	☐
Thursday	☐	☐	☐	☐
Friday	☐	☐	☐	☐
Saturday	☐	☐	☐	☐
Sunday	☐	☐	☐	☐

24. How would you characterize the health of your business? (● mark ONE)

☐ Stable ☐ Accelerating ☐ Declining

25. Approximately what percentages of your customers come from each of the following towns or cities?

(Total should = 100%)

a. ____% Scarsdale
b. ____% Edgemont
c. ____% Eastchester
d. ____% New Rochelle
e. ____% Mamaroneck
f. ____% Other _____(specify)
g. ____% Other, don't know
100 %

26. How many customers/clients visit your business per week? (● mark ONE)

☐ none
☐ less than 50
☐ 50-250
☐ 250-500
☐ over 500

27. Please describe the target market of your business. (● mark ONE for <u>each category</u>)

Gender ☐ Male ☐ Female ☐ No gender is targeted

Age ☐ under 21 ☐ 22-34 ☐ 35-49 ☐ 50-65 ☐ Over 65 ☐ No age category is targeted

28. Approximately what percentage of your business sales are done in person, over the phone or using the Internet?
(Total should = 100%)

a. _____% in person
b. _____% over the phone
c. _____% using the Internet
100%

29. Do you have any other feedback that you would like to share? (Please record)