

# 2017 TOWN OF DANVILLE RETAIL SURVEY RESULTS



## LOCAL CONSUMER SHOPPING AND DINING PREFERENCES

# 1,345 RESPONDENTS

- 80% WOMEN**
- 71% DANVILLE RESIDENTS**
- 41% BETWEEN 41-55 YEARS OF AGE**
- 20% DIRECT NEIGHBORS**
- 592 WRITTEN COMMENTS**

### SHOPPING

- ⇒ Residents seek convenience, value, quality, and relevant product types
- ⇒ Respondents prefer to shop at Broadway Plaza and Stoneridge over Danville because of product diversity
- ⇒ 72.42% local consumers shop on-line monthly

### DINING

- ⇒ 68% prefer to dine locally
- ⇒ Consumers desire affordable diverse cuisine and service models that fit active lifestyles

### PARKING

- ⇒ Perceived lack of parking supply in downtown influences visits
- ⇒ \$20 Million reinvestment in downtown parking supply by 2018 should mitigate perceptions

### CUSTOMER SERVICE

- ⇒ Professional and helpful customer service, product demos
- ⇒ Convenience shopping options (online, delivery, and in store pick-up)
- ⇒ Extended hours, flexible policies, desired

### QUALITY OF LIFE

- ⇒ 70% identified downtown events as main driver for downtown visits with family
- ⇒ Maintain Historic charm and character of community

### CIVIC PRIDE

- ⇒ Residents value civic pride and shop locally when goods and services match needs
- ⇒ Residents seek diverse, affordable products and services when shopping local

## COMPLETE SURVEY SUMMARY AND RESULTS

For complete survey data and an in-depth summary of survey results, visit the Economic Development home page on [www.danville.ca.gov](http://www.danville.ca.gov).





*"Small Town Atmosphere  
Outstanding Quality of Life"*

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**DATE:** March 28, 2017  
**TO:** Mayor and Town Council  
**FROM:** Jill Bergman, Economic Development Manager  
**RE:** Overview of Danville Retail Survey Findings

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Following the adoption of the 2016-2021 Comprehensive Economic Development Plan in summer 2016, the Town embarked on several implementation strategies. In fall 2016, a *Resident and Consumer Online Survey* was administered to better understand local consumer preferences and shopping patterns. The survey was promoted through press releases, social media, online publications, the Danville Area Chamber of Commerce and local real estate groups.

Survey participation was strong, with 1,345 responses received. The survey respondents were mostly female (79.95%); most of them lived in Danville (70.71%); and the majority fell into two age categories of 41-55 (40.69%) and 56-70 (30.26%).

Of the surveys received, 592 respondents (44%) shared valuable comments in open-ended questions related to survey topics. The general tenor of the comments revealed that participants were supportive of the Town's consumer engagement efforts and are interested in providing input that could advance economic vitality in Danville.

Survey results are intended to assist business owners/operators, property owners/leasing agents, and local government in their respective roles to advance positive changes in Danville's retail economic climate. Ranked responses below are based on weighted average, others by highest percentage.

### **Retail Responses**

- *What's Important to Consumers:* Survey results indicate that the Danville consumer finds convenience, product and service variety, price point value and supporting the local economy to be the top four considerations when deciding where to shop.
- *Top Shopping Destinations:* Not surprisingly, survey respondents identified Broadway Plaza and Stoneridge Mall as the top two shopping destinations for non-grocery

items. We were pleased to find that Historic Downtown Danville was ranked as the third shopping destination for survey respondents.

- *Preferred Store Category:* Survey respondents listed discount stores (e.g., Target, Marshalls, Costco), department stores (e.g., Macy's, Nordstrom), and online retailers as the places where they shop for non-grocery items.
- *Online Buying Frequency:* Survey results reveal that most of the respondents shop online 1-2 times per month (72.42%), with nearly half (48.38%) shopping online at least 3-5 times, and a fifth shopping online more than 6 times per month (21.30%).
- *Retail Category Preferences:* Survey respondents indicated that, in the retail category, they'd like more women's clothing and shoe stores in Danville. Respondents also indicated desire for more specialty retail stores that offer auto parts and accessories, computer and electronics, optical goods, cosmetics/beauty, gifts and souvenir, home furnishing and sporting goods.
- *Obstacles to Shopping Locally:* Survey respondents indicated that the top three obstacles for buying local include limited product selection (66.26%), price point (50.39%) and store hours (25.14%).
- *Evaluation of Danville Shopping Experience:* When survey consumers do shop in Danville, the responses reveal that customer interaction, quality of products, and convenient nearby parking are the top three reasons for why they do so. On the flip side, the perceived lack of convenient parking, lack of product/service diversity, and price point value were the top three negative aspects of shopping in Danville.

## **Dining Responses**

- *Importance of Dining Destination:* Most survey respondents (94.83%) indicated that having a prominent dining presence in Danville is "Important" or "Somewhat Important."
- *Evaluation of Danville Dining Experience:* When survey respondents dine in Danville, the responses reveal that customer interaction, quality of food, and diversity of the menu are the top three reasons for why they do so. On the flip side, the perceived lack of convenient parking and price were the top two negative aspects of dining in Danville.
- *Obstacles to Dining Locally:* While a majority of survey respondents (68.16%) indicate that they do dine locally, the ones that do not cite that the top two reasons to be value/price point (20.41%) and type of cuisine (20.24%). This is somewhat consistent with the findings of the survey question above.

## General Responses

- *Finding the Right Business:* When we asked how consumers find businesses that best fit their retail or dining needs, survey respondents reveal that most do so from personal referrals (75.9%) followed by the business' website (61.85%) and social media (43.76%). Traditional media platforms, such as newspapers and magazines, come in a distant fourth (25.14%). Yelp was identified in most written comments as the main source when searching online.
- *Improving Shopping and Dining Experience:* Survey respondents rated the following as important changes that would improve their personal shopping and dining experience locally (listed in order of weighted ranking):
  1. Continuous shuttle or trolley transport between shopping and dining areas
  2. Valet or availability of retail/restaurant specific parking
  3. Free delivery service from local retailers and restaurants
  4. Ability to order online and pick-up in the store

Other important changes based on sheer percentage identify variety, quality and diversity of products and eating options (52.58%) evening hours (44.59%) and/or later hours of operation at least one night of week (38.21%) as a desired change to improve personal experience.

- *Community Events that Promote Downtown Visits:* When asked about which events or promotions motivate residents to visit historic downtown Danville, survey results revealed Street Festivals (76%), Farmers Market (73%), Art and Wine Stroll (57%), in-store promotions or sales (55%), Car Shows (32%) and Theatre/entertainment (30%) as primary motivators.

## Summary of Open Ended Feedback

The open-ended survey question asked participants for suggestions that would benefit the Town of Danville, local businesses and the community. Analysis of open ended questions can be labor intensive, but strengthen validity to the data captured in the above survey results. The top five comments captured are summarized in categories based on number of responses and include the following:

*Parking:* The themes among written comments included the perceived lack of convenient parking in downtown, parking space sizes and whether there would be enough parking to support future development. The Town consistently monitors parking availability by uses to ensure the downtown has adequate parking. In fact, by summer 2018, the Town will have completed over \$20 million in parking infrastructure improvements to expand availability of parking in downtown.

*Dining Diversity:* Residents and consumers would like to see more ethnically diverse cuisine along with more reasonable price choices for families and fast-casual restaurant models that fit Danville residents' active lifestyles.

*Small Town Character:* Maintaining the charm and character of the community is extremely important to survey respondents who provided written comments that surrounded a desire to maintain the. Fortunately, Danville continues to guide public and private redevelopment to result in a built environment that retains the pedestrian-friendly scale while embracing the downtown's unique history and character.

*Hours of Operation:* Survey results confirmed businesses should consider extending hours of operation to be in sync with consumers shopping preferences, and additional comments provided reinforces the importance for downtown business to stay open later to meet the needs of local consumer lifestyles. This preference is consistent with findings outlined in the Town's Comprehensive Economic Development Plan. Given over 90% of the Town's workforce commutes outside Danville during the week, it validates that a fair amount Danville's consumer base returns after most businesses close in Danville.

*Product Diversity and Price Point:* Consumers reinforced survey findings with additional written comments desiring product diversity and value price points. Comments remark diversity and value.

## **Conclusions**

The survey was developed and administered to understand local consumer preferences. By conducting a home-grown survey, the data captured can help align the goals of local government, businesses, landowners and residents. The data reinforces the notable shift in national consumer trends, findings in the Town's Comprehensive Economic Development Plan and public opinion.

Business owners, land owners, leasing agents, local government, business organizations and consumers can collectively make a difference by understanding their role in supporting Danville's economic vitality. All stakeholders are recommended to seize opportunities by adapting to consumer needs and enhance consumer experiences.

For example, imagine what downtown Danville could look like if more downtown businesses aligned their hours to capture visits before or after evening and weekend dining experiences. Not only might the downtown be transformed into a lively evening destination, but this synergy could become the catalyst that attracts diverse retailers to Danville over other competitors such as downtown Walnut Creek. Simple steps can attract more local consumers and their guests. Landowners could align rents commensurate with retailers' operational costs; business owners could evolve current operations to provide diversity in products at reasonable price points; and government

should continue to monitor parking demands and the perception of limited parking in downtown. And lastly, Danville residents can support the downtown they treasure by supporting local businesses.

The survey results shine a spotlight on the growing convenience of online shopping (20% average increase each year). Shifting consumers to purchase locally can have positive impact on retaining the businesses in our community. We need to effectively tell the story of why shopping locally is important. For example, for every \$50 spent in the community, \$23 stays in the community through local reinvestment. When residents shop, dine or do business in Danville, they are investing in the local economy...and their own sense of community pride.

To view entire survey results, including supplemental comments, visit <https://www.surveymonkey.com/results/SM-8RFYQ8PG>.