

MBA 562

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[HILLSBOROUGH STREET REVITLIZATION STUDY]

TABLE OF CONTENTS

Executive Summary	1
Background and Purpose	1
Hillsborough Street Community Service Corporation	1
Managerial Problem Definition	1
Our Project	2
<i>Specific Research Questions</i>	2
<i>Hypotheses</i>	3
Exploratory Research	3
In-Depth Interview with HSCSC	3
Research Method and Sample	3
Method	3
Sample	4
Analysis and Results	5
Crosstabulations	5
<i>Hillsborough Street Businesses Redevelopment</i>	5
<i>The Average Number of Weekly Visits per Respondent</i>	5
<i>The Need for a Unique Local Establishment</i>	6
<i>Perception of Hillsborough Street</i>	6
<i>The Type of Nightlife Entertainment Desired</i>	6
Independent Samples T-Test	6
<i>The Type of Establishment Hillsborough Street Needs</i>	6
<i>Reasons for Not Visiting Hillsborough Street</i>	6
One-Way ANOVA Analysis	7
<i>Value of Hillsborough Street to the NC State Campus</i>	7
Conclusions and Recommendations	7
Appendices	8
Appendix A – Qualtrics Survey Questions	8
Appendix B – Hillsborough street redevelopment	14
Appendix C – Weekly Visits Per Respondent	15
Appendix D – Need for a Unique Local Establishment	16
Appendix E – Perception of Hillsborough Street	17

Appendix F – Desired Nightlife Entertainment 18
Appendix G – Type of Hillsborough Street Establishment Needed 19
Appendix H – Reasons for Not Visiting Hillsborough Street..... 21
Appendix I – Value of Hillsborough Street to the NC State Campus..... 23

EXECUTIVE SUMMARY

Hillsborough Street lacks a clear identity. The street divides the North Carolina State University campus from several residential neighborhoods, and current businesses fail at attracting either customer group. Jeff Murison, Executive Director of the Hillsborough Street Community Service Corporation (HSCSC), has taken it upon himself to improve the current state of Hillsborough Street. Jeff's challenge is in dealing with the many stakeholders involved with Hillsborough Street. These include students of NCSU and Meredith College, NCSU and Meredith College employees, area residents, and area business owners. There appears to be wide agreement in support of redevelopment of Hillsborough Street. While most people support improvement, some don't share the vision, and may be a barrier to progress. Jeff needs to understand what these different stakeholders want for the future of Hillsborough Street and what percentage of people want to block further development.

To assist Jeff, we conducted a market research project with the goal of identifying what each stakeholder group wants to see in future Hillsborough Street development. To accomplish this we launched an online Qualtrics survey and conducted in-depth interviews with area business owners. This data will help us learn what makes other recently developed Raleigh areas, such as Cameron Village and Glenwood South, so much more successful than Hillsborough Street.

Our data, discussed in greater detail below, shows that 5.3 percent of survey takers feel that the current state of Hillsborough Street satisfies their needs and desires. We are in agreement with Jeff Murison that it is a small, vocal minority which is causing the issues. The results explained below will assist him in his future projects.

BACKGROUND AND PURPOSE

HILLSBOROUGH STREET COMMUNITY SERVICE CORPORATION

The Hillsborough Street Community Service Corporation (HSCSC) is an independent, not-for-profit, business improvement entity created in the fall of 2009 as a partnership between the City of Raleigh, North Carolina State University, and the property owners and businesses on Hillsborough Street.

The HSCSC territory is roughly 2.5 miles long, running on both sides of Hillsborough Street, from St. Mary's School to the Gorman/Faircloth intersection (including Morgan Street and a few other side streets). This stretch includes a diverse collection of businesses, organizations, institutions, and residential options.

The Corporation's mission is to make the Hillsborough Street community a distinct destination in Raleigh by providing services and programs that improve the economic sustainability of the businesses, as well as increasing the market value of the properties, within the territory. The HSCSC provides cleaning, security, beautification, marketing, economic development, tourism, advocacy and special event programs, and other services throughout the year to make the Hillsborough Street community a better place to live, work, play, shop, dine, learn, and visit.

MANAGERIAL PROBLEM DEFINITION

Hillsborough Street has an opportunity to become a well-developed, well-branded, and well-recognized hospitality corridor connecting the greater Raleigh-Durham area to downtown Raleigh. More importantly, there is opportunity for this area to be developed into a place that people are likely to stop and spend some time, rather than simply using Hillsborough Street as an entry-way to other downtown locales such as the Glenwood South and Fayetteville Street areas. Hillsborough Street currently lags behind other community consumer “hot spots” in the Triangle area. Yet, due to its location and large number of stakeholders, Hillsborough Street has the opportunity to become a prosperous, go-to destination area. Ultimately, the Hillsborough Street area needs to be developed into a distinct destination in Raleigh, both for visitors and residents.

Hillsborough Street stakeholders include government, residents and property owners, universities (Meredith, St. Mary’s, and NCSU) and their faculties, students, and alumni, and the merchants of the Hillsborough Street area. Development is currently being inhibited by zoning regulations. As students of North Carolina State University and residents of Raleigh, we are stakeholders in the local community. We have noticed that there are a number of struggling businesses surrounding the NC State Campus along Hillsborough Street.

As students, it is alarming to see our local businesses and social gathering places, such as the now defunct Farmhouse for example, go out of business. Downtown Raleigh is continually growing, with many new restaurants and bars successfully opening, yet Hillsborough Street is facing negative perceptions which are working against its development and success. There is a need to identify how to mitigate negative perceptions and improve business offerings. Our goal was to conduct market research that can be leveraged by businesses surrounding the university on Hillsborough Street to assist with their long-term plans and business strategy. We explored the Hillsborough Street demands, as well as the trends in other thriving consumer communities in the downtown Raleigh area, to determine factors that may be aiding the success of local businesses.

OUR PROJECT

Through our market research, we aimed to assist the HSCSC in exploring the perceptions and consumer needs of Hillsborough Street. In addition, we looked at other successful Raleigh consumer communities as possible case studies for Hillsborough Street improvements. By focusing on the three fundamental research questions below, we hope to provide the HSCSC with insightful data and research that can be leveraged in long-term development planning.

Our research included both surveys and in-depth interviews. Our plan was to target three local sample demographics to gain an understanding of market needs. Our pool of interviewees (or sources of information) included: HSCSC, business owners, area residents, and consumers, including both students and non-students. We focused specifically on how to make Hillsborough Street the primary destination for all residents of the Raleigh area, both during the day and night.

SPECIFIC RESEARCH QUESTIONS

- What type of businesses would make Hillsborough Street more attractive to consumers?
- What amenities and offerings would help Hillsborough Street businesses flourish?
- What attracts consumers to other Raleigh areas such as Fayetteville Street and Glenwood South, making them destinations for businesses and nightlife?

HYPOTHESES

- Hillsborough Street lacks visual appeal and identity, which deters many customers.
- The lack of a signature establishment fails to make Hillsborough Street a destination location (i.e. Mitch’s would have more customers if people came to the area for another “heavyweight” bar or dining establishment).
- The redevelopment of Hillsborough Street needs to consider the revitalization of other Raleigh “neighborhoods” as case studies for how to create a successful destination area.

EXPLORATORY RESEARCH

IN-DEPTH INTERVIEW WITH HSCSC

One of our most important in-depth interviews took place with Jeff Murison, Executive Director of the Hillsborough Street Community Service Corporation. Jeff reiterated to us the opportunity that the Hillsborough Street area has to become a well-developed, branded, and well-recognized, hospitality corridor that can also be a distinct destination in Raleigh, whether you are visiting or live here. He feels that the Hillsborough Street area should be the highest value area in terms of real estate, second only to downtown Raleigh, although it is currently not reaching that potential.

Jeff also mentioned that a survey had been done at North Carolina State University (although he wasn’t shown the physical study and was only verbally told about it by NCSU officials and the student government) which concluded that 60 percent of students who were granted admission to NCSU and turned it down made that decision somewhere between Dan Allen and the Beltline; attributing this decision making process to Hillsborough Street’s visual appeal and offerings, or lack thereof. Ultimately, this affects and works against all aspects of NCSU’s admissions, from athletics recruitment to school spirit, and alumni relations to general enrollment.

Jeff also spoke more with us about the new developments around the NCSU Bell Tower and across the street from Cup A Joe (the Val Park area), mentioning that there are still spots/opportunities for new “marquee” establishments. However, getting those establishments to commit to what can only be seen currently as a dying area of Raleigh is the ultimate challenge.

Lastly, parking is a topic/issue that Jeff hears about the most from all of the different Hillsborough Street stakeholders. There is the perception of a lack of parking despite many available parking areas for customers that are not clearly marked at this time.

RESEARCH METHOD AND SAMPLE

METHOD

After evaluating the potential best approach to obtain feedback from each group, we decided to use the following survey methods:

- Consumers: This was the main target sample for the research and, therefore, we wanted to capture its data via multiple channels. The purpose of this survey was to find out what motivates people to go to Hillsborough Street or other downtown destinations, and what will

further motivate them to do so in the future. The survey was developed as an online survey, using NCSU Qualtrics, and the following channels were utilized:

- Email Referral Snowballing: We sent emails to personal contacts and asked them to forward it to their contacts until we reached an appropriate sample size.
- Social Media: We promoted the survey via Facebook, Twitter, and LinkedIn.
- Community Websites and Listserv: We distributed the survey to stakeholders outside of our personal networks via community websites and listserv.
- Business Owners: Business owners' feedback was captured using in-depth interviews with selective business owners on Hillsborough Street. We interviewed a sample of Hillsborough Street businesses including HotBox Pizza, Pita Pit, and Sugar Magnolia. The main purpose of the interviews was to capture the business owners' point of view on how to improve business on Hillsborough Street.
- Area Residents: Our plan was to design a one-page survey and ask the homeowners to fill it out before one of their meetings and/or distribute via a member email list, if available.

SAMPLE

Our survey sample was broken up into the following categories:

- “Consumers,” people who spend money at Hillsborough Street and other downtown areas (Fayetteville Street, Glenwood South, Cameron Village)
- “Business Owners” on Hillsborough Street
- “Area Residents” around Hillsborough Street

Our consumer survey (Appendix A) was successful in capturing data from a relatively large sample size. We had a total of 528 respondents take our survey, with an 85 percent completion rate. Our survey was live for 21 days and reached a broad audience including students, alumni, faculty, non-students, area residents, business owners and visitors from areas outside of Raleigh.

Once contact was initiated with the University Park Homeowners Association (Area Residents), they declined the opportunity to have a focus group with members of our team to voice their opinions about the Hillsborough Street Revitalization. Fortunately, while reading some of the typed-in responses from our Qualtrics survey, it was clear some of the University Park residents took the survey. Although we were unable to speak to any residents one-on-one, we were able to get some of their opinions via our online survey.

Our first meeting with a local business owner was with Coop Elias, owner of Sugar Magnolia, a small and unique clothing boutique, near the east end of the NCSU campus. The store sells all of its merchandise for “\$15 or less”. It is a great business model for a college student budget. Since Sugar Magnolia is a small store with a limited advertising budget we expected them to be against further development of the area and defensive of their territory. This was not the case at all. Sugar Magnolia welcomes increased competition from large clothing retailers. They feel a large retail establishment such as Gap would only improve their business, not steal customers. Coop stated “a Gap on Hillsborough would bring more people to the street. They will inevitably walk past our store and see that we have designs and prices that Gap cannot offer.” This belief, that more competition will be good for business, was held by others as well.

Next we met with Kimit Shah, the General Manager of the Hillsborough Street Pita Pit. The Pita Pit location is on the section of Hillsborough Street that has not been repaved or completed any re-development work. Currently, a mixed-use building is being constructed across the street. Pita Pit is very anxious for further redevelopment. Kimit is completely committed to these revitalization projects and giving students what they want, as they are his main customer base. He sees a future

for the area with a better sense of community: people walking a well-lit street while exploring the local shops and restaurants. Pita Pit has experienced issues with some area residents who are completely opposed to the college atmosphere. It was an uphill battle to obtain a permit to sell beer, as some local residents oppose any new “bars” in the area. Pita Pit remains committed to promoting Hillsborough Street activities, investing in this area in which they operate, and assisting the HSCSC where they are able.

Our final meeting with an area business owner was with Jamie McCaskill, a co-owner of Hot Box Pizza. Hot Box has a good relationship with the HSCSC and is committed to helping improve the area. They feel there are some larger macro issues that need to be resolved with the city before real progress can be made, and that these issues come from the small minority of residents opposed to development. One such issue is the Hillsborough Street restriction prohibiting food and beverage service on the sidewalk. Jamie says this restriction does not exist anywhere else in Raleigh and believes that restrictions such as this make it difficult for businesses to successfully operate on Hillsborough Street. Jamie is aware of instances where the City of Raleigh provided financial assistance to downtown businesses to invest in and improve their facilities. He would like to see similar commitment to Hillsborough Street businesses. When asked about the threat of increased competition Jamie shared the view that it will only help business. He feels that larger chains will naturally provide increased marketing to the area, which will attract more customers. To ensure that the street is always filled with people, Jamie would like to see several mixed-use developments come to the area. Jamie, like the other business owners we met with, is in favor of revitalizing Hillsborough Street and committed to helping the HSCSC where possible.

ANALYSIS AND RESULTS

Our team conducted a series of crosstabulations, independent samples t-tests, and one-way ANOVA analyses to determine recommendations for the Hillsborough Street revitalization effort. This section highlights the results from those analyses.

CROSSTABULATIONS

We ran crosstabulation analyses comparing the results of students and non-students with the following:

HILLSBOROUGH STREET BUSINESSES REDEVELOPMENT

This cross tabulation (Appendix B) resulted in a chi-square value of 0.509, which is higher than 0.050, indicating that there is no significant difference between students and non-students when it comes to whether or not Hillsborough Street needs to be redeveloped/revitalized. The higher number of respondents (62.6%) support revitalization.

THE AVERAGE NUMBER OF WEEKLY VISITS PER RESPONDENT

There is a significant difference between students and non-students when it comes to the number of times per week they visit Hillsborough Street, with the overwhelming majority of total respondents (89.9%) visiting Hillsborough Street less than three times per week (Appendix C). As would be expected, non-students are more likely to visit less than three times per week (92.8%)

than students (87.6%), while students have a higher likelihood to visit more than three times per week (12.4%) than do non-students (7.2%).

THE NEED FOR A UNIQUE LOCAL ESTABLISHMENT

There is a significant difference between students and non-students when it comes to the desire for a unique local establishment (Appendix D). The majority of responses (70.2% of both students and non-students) indicated that Hillsborough Street needs a unique local establishment. Non-students have a higher desire for a unique local establishment (75.6%) than do students (65.9%).

PERCEPTION OF HILLSBOROUGH STREET

There is no significant difference between students and non-students when it comes to how they perceive Hillsborough Street. The majority of responses (59%) rated Hillsborough Street between 4-and-7 on a scale of 1-to-10 (Appendix E). Comparatively, only 2.9% rated it between 8-and-10, while 38.1% rated between 1-and-3. Of total respondents, 68% perceive Hillsborough Street as “Old/Rundown,” 48% as “Not Fun,” 43% as “Not Accessible,” and 40% as “Dirty.”

THE TYPE OF NIGHTLIFE ENTERTAINMENT DESIRED

There is a significant difference between students and non-students when it comes to the type of nightlife desired (Appendix F). A majority of responses (50.4% of both students and non-students) indicated a desire for a live music venue on Hillsborough Street. Students prefer DJs and dance clubs (19.1%) more than non-students (8.5%).

INDEPENDENT SAMPLE T-TESTS

Next, we ran an independent sample t-tests between students and non-students with regards to the following:

THE TYPE OF ESTABLISHMENT HILLSBOROUGH STREET NEEDS

There is a significance difference between students and non-students in regards to the type of establishment that Hillsborough Street needs for retail shopping, in-and-out dining, and bars (Appendix G). Looking at the mean values of responses, we can find that non-students are in more favor of retail shopping while students are in higher favor of in-and-out dining and bars. We can also observe that the highest cumulative totals for both students and non-students are for sit-down dining and retail shopping.

REASONS FOR NOT VISITING HILLSBOROUGH STREET

There is a significance difference between students and non-students in regards to the reasons they do not visit Hillsborough Street in terms of dining establishments, nightlife, and safety (Appendix H). Looking at the means, we can find that students ranked those reasons higher than non-students. However, we noticed that both groups rate insufficient parking as the number one reason they do not visit.

ONE-WAY ANOVA ANALYSIS

Finally, we ran a one-way ANOVA analysis to compare students and non-students with their opinion of value that Hillsborough Street adds to the NC State campus.

VALUE OF HILLSBOROUGH STREET TO THE NC STATE CAMPUS

There is significant difference between students and non-students when it comes to whether or not Hillsborough Street currently adds value to NC State's campus (Appendix I). On average, students rated Hillsborough Street as providing lower value to the NC State campus than do non-students. On the other hand, both students and non-students agree that current offerings on Hillsborough Street do not meet their needs and desires and that Hillsborough Street needs to be redeveloped.

CONCLUSIONS AND RECOMMENDATIONS

Through our analysis above we found support for all three hypotheses. Our research leads us to conclude that the vast majority of Hillsborough Street stakeholders are pro-revitalization. The street, in its current state, does not meet the needs of any stakeholder group. It is a struggling area that, according to Jeff Murison, should have the second highest property value in Raleigh, second only to downtown. Its lack of identity makes it difficult to market to a given customer group.

First and foremost, Hillsborough Street needs to finish paving the west end of the street, followed by improved sidewalks and lighting. Coupled with improved facades of the buildings, this will provide a newer and safer feel. This alone will improve perceptions of the street.

Next, the street needs a marquee dining establishment able to attract a variety of consumer groups. 70 percent of survey takers would like to see a unique, local establishment, similar to Top of the Hill in Chapel Hill, NC. This will improve the perception held by 60 percent of survey takers that say Hillsborough Street lacks nightlife. Providing an outdoor dining option (sidewalk, deck, or roof) will satisfy the 81 percent of people who claim more outdoor dining would increase their frequency of visits to Hillsborough Street.

Parking is also a perceived issue with Hillsborough Street. Although there are a variety of parking options, particularly after 5:00pm, they are not well marked and awareness of all possible parking options is low. Maps and signs with parking rules and hours should be prominently displayed. Finally, students and residents alike are deterred from the area because they feel homeless people harass them for money as they walk the street. Business owners need to actively protect their customers if they see this happening outside their storefronts.

The core of any business is their research and development, their ability to invest in their business to continually bring value to their consumers. Hillsborough Street is no different. The research has been done and the consumers demand more value to visit the area. It is time to begin development so that Hillsborough Street can reach its full potential.

APPENDICES

APPENDIX A – QUALTRICS SURVEY QUESTIONS

Q1 Thank you for taking your time in helping with this survey. This survey is aimed to assist Hillsborough Street Community Service Corporation (HSCSC) in identifying the needs of Hillsborough Street visitors. Our goal is to determine what makes other Raleigh "neighborhoods" successful. We will use this information to drive the future development of Hillsborough Street. Therefore, your honest opinion can help shape the future of Hillsborough Street! This survey is conducted and administered by a group of MBA students at North Carolina State University. The Hillsborough Street Community Service Corporation (HSCSC) is an independent, not-for-profit, business improvement entity created in fall 2009 as a partnership between the City of Raleigh, North Carolina State University, and property and business owners on Hillsborough Street. Thank you again for your participation!

Q2 I am... (Please check all that apply)

- A current student at North Carolina State University or Meredith College (1)
- A Recent Alumni (within 3 years) of North Carolina State University or Meredith College (2)
- An Alumni of North Carolina State University or Meredith College (3)
- An employee (faculty/staff) at North Carolina State University or Meredith College (4)
- I did not attend North Carolina State University or Meredith College (5)
- Other (please specify) (6) _____

Q3 Do you frequently visit Hillsborough Street as a consumer (shopping, dining ... etc)?

- Yes (1)
- No (2)

Q4 On average, I visit Hillsborough Street ___ times per WEEK as a consumer (shopping, dining ...etc)

- 0 (1)
- 1-3 (2)
- 4-6 (3)
- More than 6 (4)

Q5 On average, I visit Hillsborough Street ___ times per DAY as a consumer (shopping, dining ... etc)

- 0 - not everyday (1)
- 1 (2)
- 2 (3)
- 3 or more times per day (4)

Q6 I visit Hillsborough Street for ____ (please check all that apply)

- Breakfast / Coffee / Lunch (1)
- Drinks (2)
- Retail shopping (3)
- Dining (4)
- Bars and Nightlife (5)
- Ease of Accessibility/Parking (6)
- A Social Destination (7)
- Greater feeling of comfort/safety (8)
- I do not visit Hillsborough Street (9)

Q7 Select the extent to which you agree/disagree with the following statements (1 being highly disagree and 7 being Highly Agree)

	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)	6 (6)	7 (7)
The current offerings on Hillsborough Street satisfy my needs and desires (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hillsborough Street businesses need redevelopment/restoration to attract customers (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hillsborough Street currently adds value to NC State Campus (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adding affordable apartments on or near Hillsborough Street would be very beneficial (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q8 Hillsborough Street needs more ____ (please check all that apply)

- Retail shopping (1)
- Fine dining (2)
- Sit-down dining (3)
- In-and-out dining options (such as Chipotle) (4)
- Bars (5)
- Coffee shops (6)
- Other (please specify) (7) _____

Q9 The type of clothing retail establishment I would most like to see on Hillsborough Street would be something similar to a (select one only):

- Chain clothing store (like J. Crew, Urban Outfitters, H&M, Banana Republic, American Apparel, etc.) (1)
- Large store for university goods (Wolfpack pride! - could even include Peace College or Meredith apparel in small quantities - like Alumni Hall in Crabtree) (2)
- Reasonably priced clothing boutique (Fedora, Madison, Francesca's) (3)
- High-end clothing boutique (Uniquities, Scout & Molly's, SoHo) (4)
- Other (please specify) (5) _____

Q10 The type of retail establishment that would be most beneficial to Hillsborough Street would be ____ (select one only)

- Pharmacy (1)
- Grocery Store (2)
- Clothing Store (3)
- Furniture and Home goods Store (4)
- All Purpose Store (Target, Wal-mart, etc) (5)
- Other (please specify) (6) _____

Q11 The type of sit-down dining establishment I would most like to see on Hillsborough Street would be something similar to (select one only):

- High-end sports bar (like ESPN Zone, Tobacco Road, etc.) (1)
- Chain restaurant and bar (like Wild Wing Cafe, Carolina Ale House) (2)
- Fine dining establishment (like Sullivan's, SoNo, 18 Seaboard) (3)
- Unique local establishment (like Top of the Hill in Chapel Hill, Raleigh Times) (4)
- Other (please specify) (5) _____

Q12 The type of in-and-out dining establishment I would most like to see on Hillsborough Street would be something similar to (select one only):

- Take-out Sandwich/Sub Shop (Jersey Mike's, etc.) (1)
- Lunch/Bakery Cafe (Panera, Cafe Carolina, etc.) (2)
- Fast food chain (like McDonald's, Wendy's, Cookout, etc.) (3)
- Other (please specify) (4) _____

Q13 The type of night life entertainment that I would most like to see on Hillsborough Street is (select one only):

- Live music venue (1)
- DJs/Dance clubs (2)
- Bar games/Trivia (3)
- Karaoke (4)
- Other (please specify) (5) _____

Q14 Hillsborough Street lacks nightlife entertainment.

- Agree (1)
- Disagree (2)
- Neither Agree nor Disagree (please explain) (3) _____

Q15 Hillsborough Street should add at least one fine dining establishment

- Agree (1)
- Disagree (2)
- Neither Agree nor Disagree (please explain) (3) _____

Q16 Outdoor patio seating would increase my visit frequency to Hillsborough Street.

- Agree (1)
- Disagree (2)
- Neither Agree nor Disagree (please explain) (3) _____

Q17 I do not frequently visit Hillsborough Street because (please check all that apply)

- It does not offer a good selection of dining (1)
- It does not offer a good selection of nightlife (2)
- It does not have a good selection of shopping (3)
- It does not have sufficient parking (4)
- It is out of the way, so it wouldn't matter what was there (5)
- I don't feel safe on Hillsborough Street (6)
- Other (please explain) (7) _____

Q18 I frequently visit the following areas (please check all that apply)

- Cameron Village (1)
- Glenwood South (2)
- Fayetteville Street and downtown (3)
- North Hills Mall area (4)
- Cary Crossroads area (5)

Q19 What attracts you to the areas selected in the previous question? (Please select all that apply)

- Breakfast / Coffee / Lunch (1)
- Drinks (2)
- Retail shopping (3)
- Dining (4)
- Bars and Nightlife (5)
- Ease of Accessibility/Parking (6)
- A Social Destination (7)
- Greater feeling of comfort/safety (8)

Q20 What are your negative perceptions about Hillsborough Street? (Please select all that apply)

- Dirty (1)
- Old/Rundown (2)
- Unsafe (3)
- Not fun (4)
- Not accessible (5)
- Other (please specify) (6) _____
- I do not have any negative perceptions about Hillsborough Street (7)

Q22 Please rate how you perceive Hillsborough Street (1- Unclean/rundown/unsuitable, 10- Wonderful as is)

	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)	6 (6)	7 (7)	8 (8)	9 (9)	10 (10)
Hillsborough Street is (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q23 Hillsborough Street needs more ____ (please check all that apply)

- Retail shopping (1)
- Fine dining (2)
- Sit-down dining (3)
- In-and-out dining options (such as Chipotle) (4)
- Bars (5)
- Coffee shops (6)
- Other (please specify) (7) _____

Q24 If Hillsborough Street were re-developed as a mixed use area (retail, dining, etc.) with a well maintained image (clean, bright, and safe), I would definitely spend time in the area.

- Agree (1)
- Disagree (2)
- Neither Agree nor Disagree (3) _____

Q25 Hillsborough Street is and always will be a university area (only students and faculty)

- Agree (1)
- Disagree (2)
- Neither Agree nor Disagree (3) _____

Q26 What is your gender?

- Male (1)
- Female (2)
- Prefer not to answer (3)

Q27 What is your age?

- Under 18 (1)
- 18 – 23 (2)
- 24 – 35 (3)
- 36 – 45 (4)
- 46 – 55 (5)
- 56 – 65 (6)
- Over 65 (7)
- Prefer not to answer (8)

Q28 Please feel free to leave any additional comment.

APPENDIX B – HILLSBOROUGH STREET REDEVELOPMENT

Q2_Recoded * Q7_2_Recoded Crosstabulation

Count		Q7_2_Recoded		Total
		0	1	
Q2_Recoded	0	74	133	207
	1	95	165	260
Total		169	298	467

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	.031 ^a	1	.860		
Continuity Correction ^b	.006	1	.937		
Likelihood Ratio	.031	1	.860		
Fisher's Exact Test				.923	.469
Linear-by-Linear Association	.031	1	.860		
N of Valid Cases	467				

a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 74.91.

b. Computed only for a 2x2 table

APPENDIX C – WEEKLY VISITS PER RESPONDENT

Q2_Recoded * Q4_Recoded Crosstabulation

Count		Q4_Recoded		Total
		0	1	
Q2_Recoded	0	207	16	223
	1	240	34	274
Total		447	50	497

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	3.722 ^a	1	.054		
Continuity Correction ^b	3.166	1	.075		
Likelihood Ratio	3.824	1	.051		
Fisher's Exact Test				.071	.036
Linear-by-Linear Association	3.715	1	.054		
N of Valid Cases	497				

a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 22.43.

b. Computed only for a 2x2 table

APPENDIX D – NEED FOR A UNIQUE LOCAL ESTABLISHMENT

Q2_Recoded * Q11_Recoded Crosstabulation

Count		Q11_Recoded		Total
		0	1	
Q2_Recoded	0	48	149	197
	1	86	166	252
Total		134	315	449

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	5.032 ^a	1	.025		
Continuity Correction ^b	4.576	1	.032		
Likelihood Ratio	5.089	1	.024		
Fisher's Exact Test				.029	.016
Linear-by-Linear Association	5.021	1	.025		
N of Valid Cases	449				

a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 58.79.

b. Computed only for a 2x2 table

APPENDIX E – PERCEPTION OF HILLSBOROUGH STREET

Q2_Recoded * Q22_Recoded Crosstabulation

Count		Q22_Recoded		Total
		0	1	
Q2_Recoded	0	196	0	196
	1	246	2	248
Total		442	2	444

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	1.588 ^a	1	.208		
Continuity Correction ^b	.299	1	.585		
Likelihood Ratio	2.337	1	.126		
Fisher's Exact Test				.506	.311
Linear-by-Linear Association	1.584	1	.208		
N of Valid Cases	444				

a. 2 cells (50.0%) have expected count less than 5. The minimum expected count is .88.

b. Computed only for a 2x2 table

APPENDIX F – DESIRED NIGHTLIFE ENTERTAINMENT

Q2_Recoded * Q13 The type of night life entertainment that I would most like to see on Hillsborough Street is
Crosstabulation

Count

		Q13 The type of night life entertainment that I would most like to see on Hillsborough Street is (select...					Total
		1 Live music venue	2 DJs/Dance clubs	3 Bar games/Trivia	4 Karaoke	5 Other (please specify)	
Q2_Recoded	0	127	16	32	5	9	189
	1	139	48	48	7	9	251
Total		266	64	80	12	18	440

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	11.568 ^a	4	.021
Likelihood Ratio	12.077	4	.017
Linear-by-Linear Association	1.036	1	.309
N of Valid Cases	440		

a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 5.15.

APPENDIX G – TYPE OF HILLSBOROUGH STREET ESTABLISHMENT NEEDED

Group Statistics

Q7_1 Recoded		N	Mean	Std. Deviation	Std. Error Mean
Q8_1 Hillsborough Street	0	503	.53	.500	.022
needs more ___ (please check	1	25	.40	.500	.100
all that apply)-Retail shopping					
Q8_2 Hillsborough Street	0	503	.22	.416	.019
needs more ___ (please check	1	25	.08	.277	.055
all that apply)-Fine dining					
Q8_3 Hillsborough Street	0	503	.52	.500	.022
needs more ___ (please check	1	25	.36	.490	.098
all that apply)-Sit-down dining					
Q8_4 Hillsborough Street	0	503	.42	.494	.022
needs more ___ (please check	1	25	.28	.458	.092
all that apply)-In-and-out dining options (such as Chipotle)					
Q8_5 Hillsborough Street	0	503	.44	.497	.022
needs more ___ (please check	1	25	.40	.500	.100
all that apply)-Bars					
Q8_6 Hillsborough Street	0	503	.24	.429	.019
needs more ___ (please check	1	25	.28	.458	.092
all that apply)-Coffee shops					