

Montrose Business Survey – Key Findings

On August 20, 2013, AMATS published an online survey to collect feedback and attempt to learn from the unique insights offered by business owners and operators in the Montrose area. The 26 question survey included a number of open-ended response questions, allowing respondents to give their honest ideas and creative solutions without constraint. Approximately 400 letters were mailed to area businesses, inviting them to participate in the survey. At the time of this analysis, November 6, 2013, 33 had submitted responses to the survey – an 8% response rate. This report will attempt to highlight the prevailing opinions, interesting findings and creative solutions discovered during AMATS' in-depth research of the survey results.

Section #1: Key Findings - All Respondents

In this section, we consider the survey responses and open-ended comments from all 33 survey respondents. Survey invitations were sent to both property owners and lessees. The respondents were split nearly evenly, with lessees providing a slightly higher (57.6%) proportion of the overall responses.

General Statistics

- Respondents were fairly split between different business types, but given the preponderance of retail and restaurant establishments in Montrose, these two business types were under represented in the survey results. Only 20.0% claimed retail as their primary business type, and 16.7% operated food service/restaurant businesses.
- “Office/Professional” businesses contributed the greatest proportion of completed surveys (26.7%) – were they the most interested because their employees actively request a greater diversity in local transportation alternatives in the area? (i.e. easy access to lunch options)
- A good mix of small (as low as 2 total employees) and larger (maximum of 400 employees) responded to the survey. The average business had 53 employees.
- Although most employees commute to these businesses by car, a respectable proportion (given the small sample size) arrived primarily by other means: 17 primary walkers, 31 bicycle commuters and 61 transit users were reported.
- The top two obstacles to overall transportation in the area were identified as “Traffic” (50.0%) and “Lack of sidewalks/crosswalks” (42.9%)
- 90.0% indicated that the creation of a Montrose business association would be “Helpful” or “Very Helpful”

Walking

Walkability, or a lack thereof, is a major deterrent to non-vehicular transportation in Montrose. 86.2% of all respondents indicated that dangerous traffic prohibits their customers and employees from walking to or between destinations in the Montrose area. However, in somewhat of a contradictory manner, most businesses emphasized improving the vehicular traffic flow as their top priority. This begs the question: although the danger of quickly moving traffic is acknowledged as a detriment to area pedestrian activity – does the will to address this problem exist?

- Roughly 1/3 of respondents believe that the addition of sidewalks/crosswalks would encourage additional pedestrian activity in the area (is the more important factor that, from the view point of area businesses, that 2/3 do *not*?)
- In their open-ended comments, the most commonly expressed areas that needed better sidewalk connections were:
 - The north and south sides of SR 18
 - Allowing for safe pedestrian travel under I-77, opening access to businesses along Montrose West Ave and the Crystal Clinic area
- Only two specific improvements had significant support in their ability to successfully facilitate pedestrian activity across SR 18:
 - Crosswalks with signals that stop traffic (ex. H.A.W.K. signals) (43.8%)
 - A pedestrian bridge/tunnel (53.1%)
- One respondent expressed the various liabilities of pedestrians cutting through his/her property - legal/insurance, additional litter, etc. – and said that a fence was going to be installed to prevent non-customer traffic. This would definitely a setback to area connectivity. The forthrightness of this respondent is, however, appreciated. Is this a common concern that perhaps others do not wish to express so explicitly?

Cycling

Similar to pedestrians, area businesses expressed that the greatest obstacle to bicycling in Montrose is dangerous traffic, with 93.5% of respondents listing it as a concern. 83.9% mentioned the lack of bike lanes as a secondary deterrent. Despite the perceived danger, respondents indicated that 31 of their employees commute primarily by bicycle – a significant number given the small sample size.

- 56.3% indicated that the addition of bike lanes would be used by area cyclists on *at least* a weekly basis.
- 35% of respondents indicated that the availability of bike lanes is “Extremely Important” to increasing the share of cyclists in the region.
- When a similar survey was conducted among individual citizens about bicycling in Montrose, the difficulty of carrying packages while cycling was a very frequently mentioned comment. Interestingly, the issue never arose in the survey to businesses. This could be due to their framing of the questions from perspective of their employees, and not their customers.

Transit

Most respondents (84.4%) were largely unfamiliar with the transit service available in the Montrose area. Not a single respondent indicated that they were “Very Familiar” with area transit options. However, the respondents indicated that a total of 61 of their employees commute to work using public transit, making reliable transit important to maintaining dependable staffing levels.

- In terms of an area-wide circulator bus or shuttle service, the optimists and pessimists are evenly split; 25% believe the service would be used “Often” or “Very Often”, and 25% feel it would “Never” be used.
- Similar to the responses of individuals who shop or work in Montrose, these respondents indicated that the only way an area circulator/shuttle service would work is if it is inexpensive (or preferably, free), frequent and reliable.

Automobile

Montrose was clearly developed with the automobile in mind. The irony is that many area attempts to accommodate the automobile have worked to the detriment of all forms of transportation, *including* the automobile. A recurring theme throughout the responses to this survey is that maintaining good traffic flow is *the* top concern of area businesses.

- The undisputed top priority of Montrose businesses is improving area traffic flow. This was mentioned either directly or indirectly in the open-ended comments by nearly every business.
- 50% of respondents indicated that it was “Difficult” or “Extremely Difficult” to drive between businesses in Montrose.
- The re-opening of Rothrock Road to traffic was mentioned by multiple businesses.
- The two most significant impediments to automobile travel in Montrose are traffic signal timing (indicated by 73.1% of respondents) and disconnected parking lots (61.5%)
- Many indicated that there are areas where stop signs are ineffective. Particularly concerning is the 4-way stop at the intersection of Brookwall Dr. and Springside Dr., where multiple lanes in each leg make it difficult to determine turning priority. Some other solution (stoplight, roundabout, etc.) would be preferable.
- Most respondents (68.8%) felt that the quantity of parking was “About Right” in Montrose. Very few (3.1%) indicated that there were “Too Many” parking spaces.

General Land Use Observations and Suggested Improvements

In the sea of buildings and shopping plazas that is Montrose, business owners agree that standing out is critical to their success. However, in an area where building designs are simple and somewhat standardized, prominent signage is viewed as the key to increasing “foot” traffic. Some of the most frequently mentioned improvements to the area included:

- These businesses did not seem to regard existing aesthetic appearances (only 10.7%) or building layout requirements (0.0%) as detrimental to their businesses.
- Few respondents viewed Montrose as an aesthetically pleasing location, with 25% saying it was “Not at All” visually appealing.
- Despite this fact, 45.2% indicated that the visual appeal of the area is “Extremely Important” to the success of their respective businesses.
 - There appears to be some dissonance in the area of quality building design/aesthetics
- Multiple businesses indicated that they would benefit from changes in local sign regulations/ordinances
 - 25% indicated that area signage is “Not Useful”
 - One expressed frustration that the conservative signage ordinance that works well in lower density, lower intensity sections of the township are not relevant to Montrose, and as a result, businesses within that township’s portion of Montrose are at a disadvantage
- A majority of respondents supported all of the proposed pedestrian amenities for the Montrose area. The most popular were “More Landscaping/Trees” (77.8%) and “Sidewalks/Crosswalks” (74.1%)

Section #2: Key Findings – Cross Tabulations

In this section, we “drill down” into the survey responses, holding one variable constant, so that we may gather meaningful information from respondents of a similar background. Due to the small sample size of this survey, as well as limitations to available demographic data (AMATS determined that maintaining the anonymity of business respondents would allow for more forthright, uninhibited responses), there were not as many opportunities to cross-tabulate data as were available in our separate individual citizen’s survey (which had 605 respondents). AMATS determined that the best opportunity for meaningful data would be to look at responses based on the type of business. Upon cross tabulating the data, most responses still mirrored the responses of the entire survey population of 33 businesses. Regardless, two groups offered some unique data: retail businesses and those in the food service/restaurant business – two business types that are among the most prominent in Montrose.

1) Retail Businesses – 6 Respondents*(Only data that differed significantly from the total survey population has been included)*

- Respondents listed one primary pedestrian commuter, one primary bicycle commuter and one commuter who primarily utilizes public transit
- Building layout (0%) and aesthetics (16.7%) were not viewed as obstacles to business
- Every respondent was in favor of a Montrose business association
- 100% of surveyed businesses viewed the lack of sidewalks/crosswalks were a detriment to pedestrian activity in the area
- All respondents were in agreement that dangerous automobile traffic and the lack of bike lanes deter people from bicycling in Montrose
- 83.3% of respondents felt that if bike lanes and/or trails connected surrounding neighborhoods to Montrose businesses, people would use them more than once per week
- 50% feel that area signage is not useful
- 83.3% feel that the availability of parking is “About the Right Amount”

2) Food Service/Restaurant Businesses – 5 Respondents*(Only data that differed significantly from the total survey population has been included)*

- These businesses indicated a higher number of employees using non-automobile transportation for their work commutes (2 walk, 3 bike and 3 take transit)
- Seem to place a higher emphasis on area aesthetics to improve the Montrose business climate. 66.7% mentioned aesthetics as a barrier to success in Montrose
- Less interested in a Montrose business association than retailers (who were unanimous in their support) were, but 60% still indicated that such an association would be “Helpful” or “Very Helpful”
- Not as optimistic that adding sidewalks would encourage pedestrian activity in the area. 80% indicated that they believe sidewalks were “Not Likely” or only “Somewhat Likely” to spur pedestrian activity in Montrose
- In terms of bike lane success, respondents fell to one extreme or the other. 60% indicated that if bike lanes or trails were added, area residents would use them at least weekly. However, the remaining 40% felt that they would “Never” be used
- Also pessimistic on the ridership potential of an area circulator or shuttle bus, with 80% indicating that such a service would rarely or “Never” be used
- Restaurateurs seem more concerned about disconnected parking lots than other groups, with 2/3 indicating them to be a barrier to business activity. 2/3 also indicated that local signage ordinances were a barrier
 - Ironically, 40% also indicated that existing signage is “Extremely Useful” in helping people get to their businesses
- 40% indicated that there are too few parking spaces in Montrose. 60% said the availability of parking is “Just about right”

Summary of Prevailing Observations

A cursory glance of the Montrose business district reveals that this was a place developed for and around the personal automobile. Its strategic location at the convergence of Interstate 77, State Route 18 and Cleveland-Massillon Road cemented a longstanding retail and restaurant dominance within the Akron metropolitan area. Area businesses made the decision to locate within Montrose with this in mind, knowing that high traffic volumes equate to high volumes of foot traffic within their places of business. This naturally leads to their generally high regard for good traffic flow within the area. High importance has been placed on signal timing, intersection signalization and access management.

Although these businesses do not seem to anticipate that many of their *customers* will arrive by way of walking, bicycling or public transit, they do understand that a percentage of their *employees* will. The availability of safe, reliable transportation for the area workforce – particularly in an area with a high percentage of lower wage, entry-level employment opportunities – should remain a concern for Montrose employers.

Montrose maintains a very high density of businesses, many of which are set back significantly from the main thoroughfares, and obstructed by businesses located on out parcels. Small businesses can almost drown in the sea of area “big-box” retailers, leaving many unique shops, restaurants and boutiques yearning to be discovered. Although most prospective shoppers can easily find the “big guys”, discovering a way to allow signage to work for these small businesses is critical to their success. Two primary signage problems seem to exist in Montrose:

1. *Scale* – As Montrose was generally developed with the automobile in mind, and roadways have been designed to keep those automobiles moving at a brisk 35 mph clip, there is very little time for a motorist to spot the sign of a retailer (even a major one) and potentially “make a move” across three lanes to enter the appropriate plaza. This leaves barely enough time to read the largest signs of the plaza anchors, let alone the smaller retailers located within. Area signage is of very little usefulness at the pedestrian scale.
2. *Lack of Standardization* – Montrose is convergence of three communities, each of which has its own signage ordinances and regulations. Another issue is that the Montrose portion of each of these communities differs drastically from the remainder of the jurisdiction – Copley Circle or the small town-center retail districts throughout Bath Township – yet are sometimes subject to the same signage requirements. The signage needs of Montrose cannot be compared to those of lower density areas. Retailers seem to agree that it would be beneficial to all if the signage of all three municipalities was complementary in nature. This common thread could weave together a new synergy for the district as a whole.