THE UNIVERSITY OF KANSAS
Institute for Public Policy and Business Research
RESEARCH REPORT

Retail Preferences Survey Report

A Study of the Shopping Habits
of the Residents of Lawrence, Kansas

Prepared for:
The City Commission of Lawrence, Kansas
The Lawrence Chamber of Commerce

by:
Vincent C. Glaeser
Research Economist

Report No. 240
October 1997

Charles E. Krider, Director
Institute for Public Policy and Business Research

ACKNOWLEDGMENTS

This survey was conducted for the City Commission of Lawrence, Kansas, and the Lawrence Chamber of Commerce.

The survey was conducted by the IPPBR Survey Lab, under the direction of Kevin Nelson. Research Assistant Sharon Eicher was instrumental in analyzing the data.

TABLE OF CONTENTS

PURPOSE

The purpose of this survey is to find out how many Lawrence residents intentionally leave Lawrence to shop, what types of goods or services they shop for, and how often they go. The survey was limited to Lawrence residents. It does not measure the impact or preferences of visitors coming into the city of Lawrence for the purpose of shopping.

An attempt was made to identify those stores, retail centers and types of items or services for which shoppers consider an out-of-town source as their first/best choice, and the reasons for that choice. The survey is intended to establish a baseline for identifying trends in shopping preferences over time as new retail options emerge; therefore, it should be repeated annually.

The initial data were collected between Thanksgiving and Christmas 1996. Within the year following, there were changes in the retailing landscape. To the east, there was the opening of the Great Mall of the Great Plains in Olathe and the explosive growth of the Metcalf South area. Here in Lawrence, among other things, The Gap opened, and work was started on Border's Bookstore and Office Depot. All of these may impact the flow of purchasing dollars into or out of Lawrence.

HIGHLIGHTS

- Approximately 28% of the shopping dollars spent by the residents of Lawrence go outside the city.
- 85% of those surveyed do some of their shopping outside Lawrence.
- Johnson County was the most popular destination, with 74% of all respondents reporting it as a place they visit, accounting for 19% of their shopping total on average, and going there an average of 13 times per year.
- Oak Park Mall was the single most popular destination reported, with almost 50% of all respondents reporting it as a favorite shopping destination.
- The store most frequently mentioned was Dillard's, named by 26% of all respondents.
- Clothing/apparel was the category of merchandise or service most frequently mentioned, with a response rate corresponding to 67% of the Lawrence population.
- Variety of selection was the most frequently mentioned reason for shopping outside Lawrence, with a report rate of 64% of all respondents.
- The Kansas City area casinos have attracted 121 people out of 407 respondents during the past year, representing 30% of those sampled.

DISCUSSION

"Where are the customers?" This is a question asked by different constituencies within Lawrence. Retailers ask it when looking for revenue. Public officials ask it when projecting sales tax collections. How many people are leaving Lawrence to shop? Where do they go? What are they looking for that we don't have? Although our sales tax revenues continue to rise, there is concern that new retail competition in neighboring towns will make it harder to keep shoppers in Lawrence.

Retail sales are the life blood of local merchants and a vital revenue source for local government. It is, therefore, prudent for local businesses and government officials to know how well the local community retains the sales dollars of its residents.

There has been a growth explosion in retail shopping space in the surrounding areas. With the size and growth of the Oak Park Mall in Overland Park, the West Ridge Mall in Topeka, the new Great Mall of the Great Plains in Olathe and the frenetic building pace of the 119th Street corridor in Overland Park, the shopping choices for customers are expanding rapidly.

In order to identify the trends and dynamics at work, this data collection survey was established with the intent that it be repeated annually. It is a more concrete way to pin down which way the dollars are flowing, rather than just relying on fears or feelings. Although it is possible, in a negative sense, to interpret these figures as a condemnation of local businesses, a more positive view would be for local businesses to see them as areas of opportunity and potential growth. The survey, data, and report are intended to provide clear and basic information to decision makers within the public and private sectors in the City of Lawrence.

METHODOLOGY

A telephone survey was conducted during the Christmas shopping season. Lawrence residents were asked about their shopping habits and preferences. Using this time frame proved valuable in that, 1) shopping is fresh in everyone's mind at that time, and 2) several questions regarding shopping behavior "during the past year" were asked, which were probably more easily answered at the end of a calendar year. Responses numbered 407, which allow a statistically significant level of confidence that the results can be generalized to the population at large.

On several of the questions in the survey, multiple answers were accepted rather than forcing a "highest priority" choice. It was felt that the extra mental effort required would not be fully accurate or reliable in a telephone survey designed for brevity. The strength of various responses is measured, instead, by the number of respondants who mentioned the item.

In the same vein, the section regarding the percent of each respondants total shopping that is done in various locations was not forced to add up to 100%. The self-reported figures were accepted as an indicator of the frame of mind of each person. Mental arithmetic was not necessary to gauge the basic impressions that they had of their shopping behavior.

This study did not differentiate between "shopping" and "buying." People were asked about where and why they went to various places with the *intent* of buying, without asking if a purchase was actually made. In trying to determine what Lawrence residents feel about the range of choices they have, the “buying” aspect is not as critical as the “where and why” aspects.

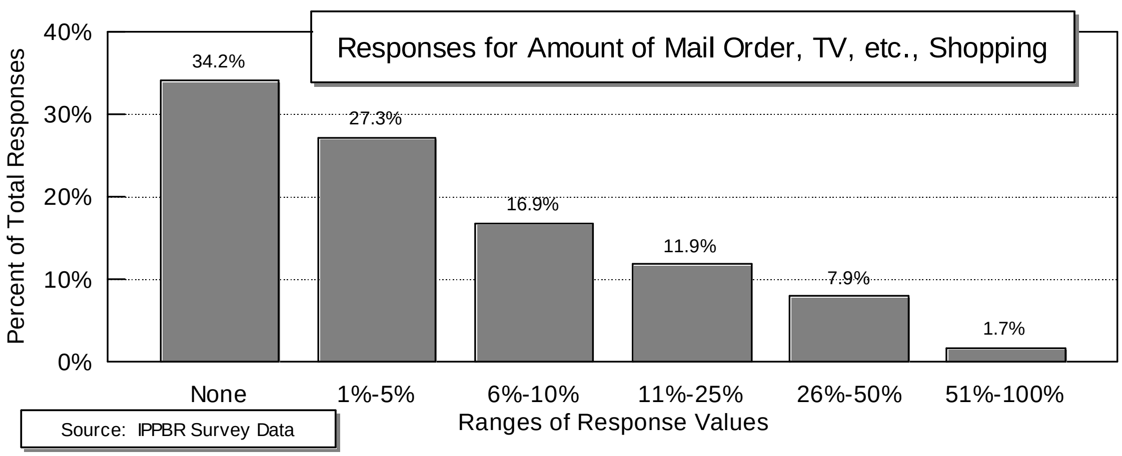
Data were collected in an SPSS program customized for this survey and analyzed as frequency distributions within the standard SPSS analysis program. Cross tablulations were performed as frequency distributions with cases selected based on the demographic variables.

In this report, each of the questions will be considered in turn and basic findings reported. Within this report, the wording from the questionnaire will appear in *italic* print. Statistical cross-tabulations with demographic data that provide interesting insights will then be reported.

SUMMARY OF DATA

Question 1. *Approximately what percentage of your total shopping in the past year was done through catalogs, mail order or the Internet?*

In this question we tried to determine how much shopping we are losing to “distance retailers,” those who do not have a physical location in any particular community. Among these are mail order catalogs, shopping channels on television, and Internet shopping services.



Of the 403 valid responses, 265 (65.8%) reported using this alternative means of shopping to some degree. These 265 respondents reported that, on average, they did 14.7% of their shopping outside Lawrence. Extrapolated to the full population, this calculated out as follows:

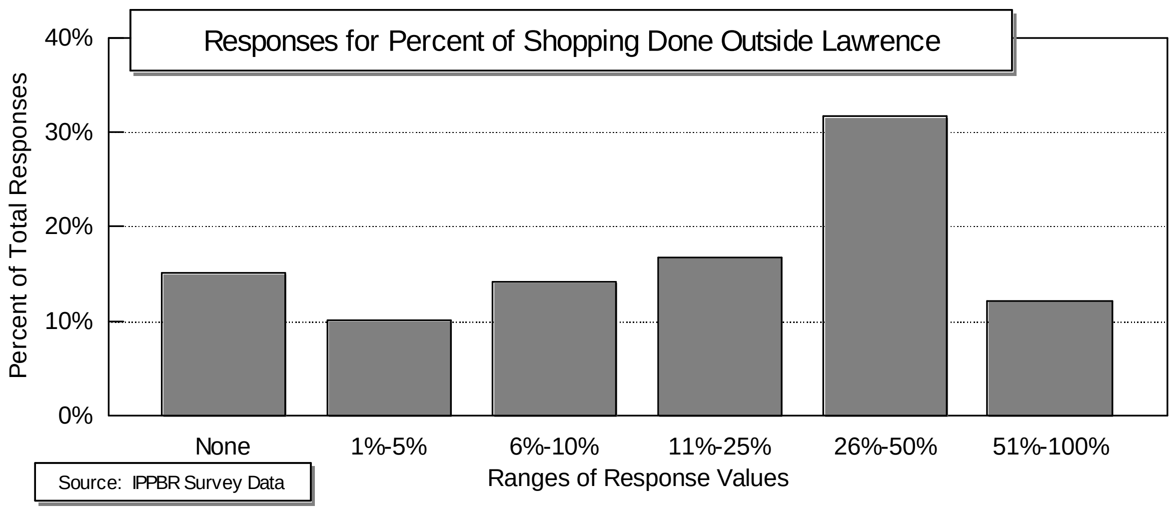
> 9.7% of all shopping by Lawrence residents is done via mail order or catalog service, television shopping channel, or the Internet.

Seven responses claimed rates of over 50%. These few outlying responses push the average up. It would be 8.4% without them. We see in the graph above that 34% of all respondents do not shop this way, while the bulk of those who do gave responses that are at the lower end of the spectrum. A detailed graph of the responses is shown on page 16.

Question 2. *Of the remaining (100% - Q1%) %, approximately what percentage of your shopping did you do outside Lawrence in the past year?*

Taking the first question into account, how much shopping is done outside Lawrence? In other words, if you do 10% of your shopping by catalog, how much of the remaining 90% is done outside Lawrence? The attempt here is to gauge the direct competition to stores in Lawrence.

Of the 404 people who responded to this question, 344 reported doing some of their shopping outside of the City of Lawrence; a rate of 85.2%. This group did, on average, approximately a third (32.4%) of their shopping outside Lawrence. Applied to the population as a whole, 27.4% of the shopping done by all Lawrence residents is done at retail sites located outside the city. The wide range of the distribution of responses to this question yields the following graph. A more detailed graph of the responses appears on page 16.



Those respondents who answered this question with "none," indicating that they did no other shopping outside Lawrence, were not asked the next four questions. The surveyors skipped to the demographics questions, starting with question 7. The several parts of question 3 attempt to determine what other geographic locations were particularly targeted by those who left town to go shopping, and how much of their shopping might be done there. The "how often" part of the question was left for respondents to answer in whatever manner they chose, such as "twice a year," or "once a month." We converted all of these responses to a yearly basis to allow for numerical calculations of averages.

A critical aspect of these figures is the validity of using them to look at consumer behavior in the city as a whole. Therefore, for every measure we present, we will make a calculation based on the total number of respondents in the survey, which will provide an extrapolated percentage that can be directly considered as representative of the general population.

I will now ask you some questions about which areas you might go to to shop outside Lawrence. These might include Topeka, the Johnson County or suburban Kansas City area, and downtown Kansas City.

Question 3a1. *How often in the past year did you go to* ***Topeka*** *to make any purchase?*
Question 3a2. What percentage of your shopping is done in Topeka?

A full 60% (201 out of 336) of those who were asked this question reported going to Topeka for the purpose of shopping to some extent in the last year. Responses ranged from "once a year" to "twice a week." Respondents who go to Topeka to shop make an average of 6 trips per year for that purpose. The percentage of their total shopping that is done in Topeka totals 12%.

The extrapolation comes out as follows: 50% of the people in Lawrence go to Topeka, they go an average of 5 times per year and do 6% of their total shopping there.

Question 3b1. *How often in the past year did you go to* ***Johnson County*** *or suburban Kansas City to make any purchase?*
Question 3b2. What percentage of your shopping is done in Johnson County or the suburban Kansas City area?

Johnson County and suburban Kansas City attracted a remarkable 89% of those who were asked this question (301 out of 340). On average, the number of trips made per year was 16. The range of these responses was "once a year" to "4 times a week." The percentage of total shopping reported as done in Johnson County or suburban Kansas City is 26%.

Extrapolated to the population as a whole, 74% of residents go to Johnson County and/or suburban Kansas City, they go an average of 13 times per year (once per month), and the shopping they do there accounts for 19% of their total shopping.

Question 3c1. *How often in the past year did you go to the* ***Kansas City*** *greater metropolitan area to make any purchase?*
Question 3c2. What percentage of your shopping is done in the Kansas City greater metro area?

This particular question was intended to include the areas that are considered "downtown" Kansas City, including the Plaza and not including the suburbs. Indeed, it was evident from the responses that most people understood the question in that way. However, an assertion has been made that the official definition of "greater metropolitan area" includes not only the city itself, but all of the suburbs surrounding the city, in this case covering about nine counties. Where there was evidence that this interpretation was the basis for a particular person's response, the response was omitted from the count to insure that conservative figures would be presented. This ambiguity will be corrected in the survey to be conducted at the end of 1997.

Of the people who were asked this question, 53% responded that they shop in what can be considered "downtown" Kansas City, as differentiated from suburbia. On average, they made 5 trips per year, just under once every two months, although the range was "once a year" to "3 times a week". The result of these trips accounted for almost 13% of their total shopping.

The extrapolated figures yield the following: 43% of Lawrence residents go to the Kansas City downtown area for the purpose of shopping, they go there 4 times per year and do 6% of their total shopping there.

Question 3d1. *Are there* ***other places*** *you typically go to make purchases?*
Question 3d2. How often in the past year did you go there to make any purchase?
Question 3d2. What percentage of your shopping is done there?

Twenty-one percent of those asked reported destinations in addition to the ones already listed. On average, they went to these other places twice per year, although the responses ranged from "once a year" to "5 times a month." These other destinations accounted for 25% of the total shopping of those who responded.

Before these places are listed, note that the extrapolated figures are as follows: 17% of all residents go to places not previously listed, and they go between once and twice a year, where 5% of their total shopping is done.

Here are the places mentioned, along with the number of times each was mentioned:

Wichita	15	Colorado	1
Chicago	10	Iowa	1
MO, St. Louis	6	Leavenworth	1
Ottawa	5	Louisiana	1
California	4	Manhattan	1
Nebraska	4	Massachusetts	1
New York	4	MO, Branson	1
Emporia	2	MO, Columbus	1
Garden City	2	MO, Independence	1
Hutchinson	2	MO, Lake of the Ozarks	1
Kentucky	2	MO, St. Joseph	1
Oklahoma	2	MO, Weston	1
Salina	2	North Dakota	1
Virginia	2	Utah	1
Colby	1	Washington (state)	1

The fact that several distant states were mentioned in these responses leads to speculation that these respondents either misunderstood the question or have exceedingly strong shopping preferences. It is difficult to imaging traveling some of these distances merely to visit a favorite store. The more probable story is that shopping was not the primary purpose of the trip. This question was an overflow for the specific areas that we wanted to know about. As such, the most useful information gained was the number of times that Wichita was mentioned.

Next, we wanted to determine the types of shopping centers and specific stores that our residents sought out for their shopping. Questions 4 asks just that, hoping to provide qualitative data to those who need to make decisions regarding the potential for successfully operating businesses within Lawrence. Multiple answers were allowed in order to provide the most complete picture.

Question 4a. *What are the names (or general location) (if known) of the shopping center you most frequently patronized outside Lawrence within the last year?*

The answers were compiled into the following list with the number of times each was mentioned. Only 343 of the 407 respondents were asked this question, since those who reported not shopping outside Lawrence skipped from question 2 to question 7. The percentage figures shown after the “mention count” is based on the percentage of the total survey size, therefore allowing a correlation to the general population.

Location	Mentioned by	Population %
Oak Park Mall	202	50%
West Ridge Mall	100	25%
The Plaza	65	16%
Metcalf South	33	8%
Town Center Plaza	23	6%
Bannister Mall	14	3½%
Metcalf Area	7	2%
Town East Mall	6	2½%
Crown Center	5	1%
Westport Mall	5	1%
Ward Parkway	4	1%
White Lakes Mall	4	1%
Metro North	3	1%
Town West Mall	3	1%
Mission Mall	2	½%
Hawthorne Plaza	1	¼%

Oak Park Mall was the most popular destination, with 50% of all survey respondents reporting it as a destination.

Respondents who listed “other” destinations outside our primary focus area also listed their favorite shopping centers in those areas. Most were out of state. Each one was mentioned only once; therefore, it was decided that they were not relevant to the intent of this question and were omitted from this report.

Question 4b. *What are the names of the stores that you most frequently patronized outside Lawrence within the last year?*

Responses to this question are shown in the following lists. In some cases, stores that already exist in Lawrence were mentioned. Some of those, such as The Gap, were not yet opened here when this survey was conducted, but in other cases, such as Penney's, it is assumed they are signaling their preference for the distant stores rather than just mentioning the local one. All stores that were mentioned have been listed, with their respective counts.

Dillard's	106
Jones Store	59
JC Penney's	54
Gap	50
Banana Republic	27
Best Buy	26
Sam's Club	25
Limited	24
Sears	22
Eddie Bauer	20
Abercrombie and Fitch	19
Barnes and Noble	14
Old Navy	13
Borders Bookstore	12
Express	12
The Buckle	12
Toys R Us	10
Anne Taylor	8
Galyan's	7
Hypermart	7
Montgomery Ward	7
Bath and Body Works	6
CompUSA	6
Sax Fifth Avenue	6
Lerners	5
Victoria's Secrets	5
Circuit City	4
Foot Locker	4
Halls	4
HQ	4
Williams Sonoma	4
American Eagle Outfitters	3
Builders Square	3
Camelot	3
Champs	3
FAO Schwartz	3
Gymboree	3
Jacobsons	3
Lane Bryant	3
Musicland	3
Nine West	3
Office Depot	3
Structure	3
Waldon Books	3
Baby Superstore	2
B. Dalton Booksellers	2
Claire's Boutique	2
Deb	2
Disney Store	2
Kohl's	2
Lady Foot Locker	2
LL Bean	2
Maurices	2
Office Max	2
Pottery Barn	2
Repp Big & Tall Shop	2
Salvation Army	2
T J. Maxx	2
Talbots	2
Town and Country	2
Venture	2
579	1
Agents of Comics	1
Baby Gap	1
Bachrach	1
Bass	1
Benneton	1
Book Record	1
Brisco Drug	1
Britches	1
Brooks	1
Casual Corner	1

Converse Outlet	1
County Seat	1
Crystal Window	1
DAV	1
Discovery Store	1
Dusty Bookshelf, Manhattan	1
Ekaean Computer Store	1
Explorers	1
Extremist	1
Fashion Bug	1
Finone's	1
Function Junction	1
Gap Kids	1
Glamor Shots	1
Golf USA	1
Gourmet Shops	1
Grand Emporium	1
Guitar World	1
Gulf Stream Imports	1
Holiday Ham	1
Home Depot	1
Hurricane	1
Image Point	1
India Emporium	1
Jack Davis Golf	1
Jack Henry Peters	1
Jewell	1
JP Todd's	1
Just for Feet	1
J. Crew	1
J.M. Bauerfields	1
Kansas City River Market	1
KC A. C.	1
KC Jeans	1
Knese's	1
Let It Ride	1
Limited, Too	1
Lord and Taylor	1
Macy's	1
Marshall Fields	1
Museum Company	1
Music Exchange	1
Natural Wonders	1
Northern Exposure	1
Organized Living	1
Outdoor Sports Store	1
Pier One	1
Price Chopper	1
REI	1
Renovator's Supply	1
Restoration Hardware.	1
Road, Track & Trail	1
Service Merchandise	1
Spencer's	1
SteinMart	1
Steve's Shoes	1
Streetside Records	1
Sunfresh	1
Sutherlands	1
Thrift Stores	1
Tobacco Store	1
Unique Furniture Options	1
Vanity	1
Von Maur	1
Watson Leather Shop	1
Western Auto	1
White Hen	1
Winstead's	1

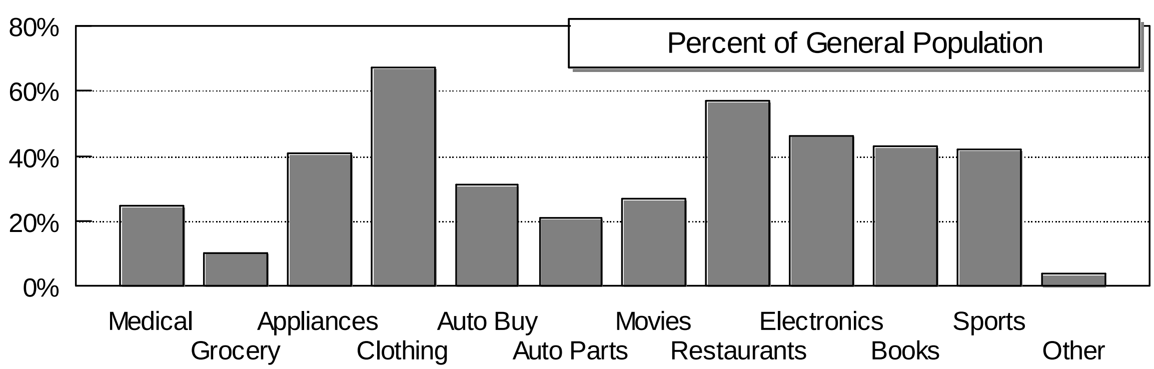
Question 5. *Which of the following items or services do you purposely leave Lawrence to seek?*

With this question, an attempt was made to identify general classifications of service or merchandise in which respondents felt the out-of-town options were more agreeably available. The category title is listed along with the percent of those asked who reported seeking it out and the calculated relevant percentage of the general population.

The categories listed in this table reflect a range of products and services that consumers could conceivable seek outside Lawrence. The list was formulated in an informal manner based on the personal experiences of economists and staff at IPPBR. It is possible to include other specific categories in future surveys, is so desired. Once again, only those respondents who answered that they did some portion of their shopping outside Lawrence were asked this question.

Category	Sought by	Population %
Medical Services	30%	25%
Grocery/Household Supplies	12%	10%
Appliances/Home Furnishings	48%	41%
Clothing/Apparel	79%	67%
Automobile Purchase	37%	31%
Auto Parts and/or Service	24%	21%
Theater/Movies/Concerts	32%	27%
Restaurants	67%	57%
Electronics/Computers	54%	46%
Books/Gifts	51%	43%
Sporting Events	50%	42%
Other Reasons	5%	4%

Among the Other Reasons mentioned were specialty stores such as building supplies, farm equipment and parts, photo finishing, blueprints, aviation supply, camping gear and crafts (one mention each) and casinos, bars and nightlife (three mentions), museums (one mention) and church (one mention).



Source: IPPBR Survey Data

The validity of any of these categories is measured by the number of times they received mention. For example, it can be noted that a great many people cannot fulfill all of their clothing needs solely within Lawrence. Pairing this information with the names of store destinations from the last question highlights a definite area of interest.

Also high on this list are restaurants (67% mention rate), electronics/computers (54%), books and gifts (51%) and appliances and home furnishings (48%). Sporting events commanded a high 50% mention rate but, with the proximity of professional teams, this is not surprising. The small numbers in the “other” category leads us to believe we covered the options fairly well. Later in this report, these categories are broken down by the different demographic data.

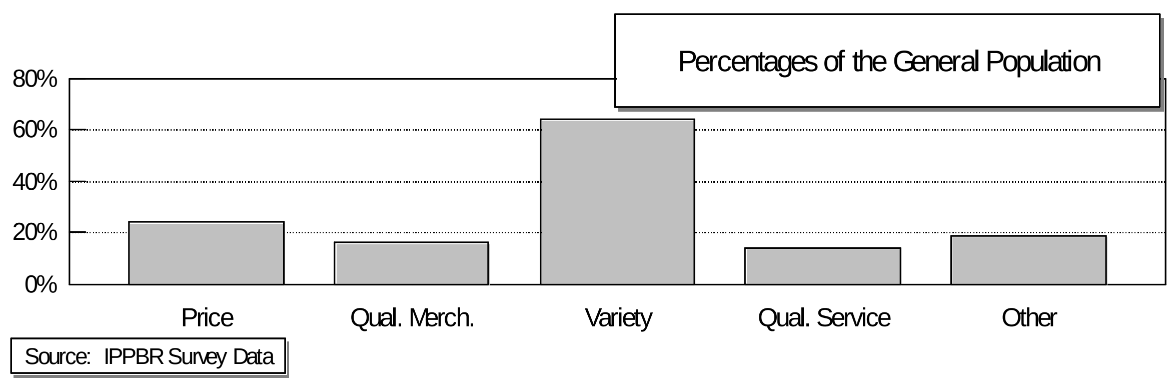
As mentioned above, newly-opened or in-process facilities such as The Gap, Southwind Theaters, and Borders Bookstore may help retain a fair amount of this business.

Question 6. *In general, why do you prefer to shop at this/these out-of-town location/s for these items or services?* Or *For the categories you’ve mentioned, why do you shop outside Lawrence?*

After learning what types of goods and services were considered more agreeably available from outside sources, it was felt necessary to understand why respondents held those views. Once again, multiple answers were accepted in order to gauge the strength of each response. A count was made of the number of times each reason was mentioned. The percentage of those asked this question who mentioned each particular reason will be listed next to each of the reasons, along with the associated percentage of the general population.

Reason	Mentioned by	Population %
Prices	28%	24%
Quality of Merchandise	19%	16%
Variety of Selection	76%	64%
Quality of Service	17%	14%
Other reasons	23%	19%

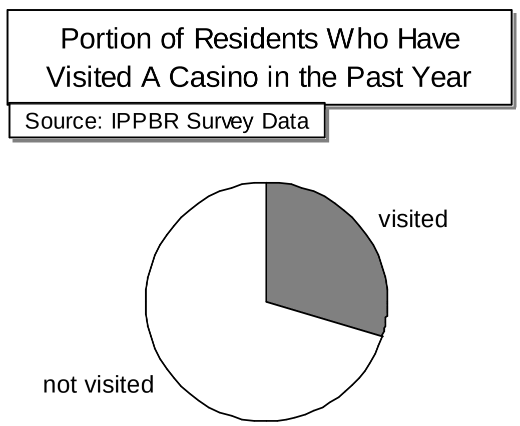
Variety of Selection is an obviously strong factor in shopping decisions, being mentioned by 261 out of 345 respondents.



There were 73 specific responses to the "other" category given which, when grouped, make up the following list:

18 seeking a "change of pace"
15 who like the convenience of "one-stop-shopping"
9 who expressed general dissatisfaction with the local facilities or establishments, including the lack of a retail mall
7 with out-of-town family ties
7 who have previously established some familiarity with other locations
6 for whom it is convenient to their place of work
4 who prefer the size or sophistication of the other establishments
4 who require a specialized item or service not available here
2 who have issues with the availability of parking
1 who was attracted by specific advertising

Question 7. *Have you been to a casino in the Kansas City area within the past year?*

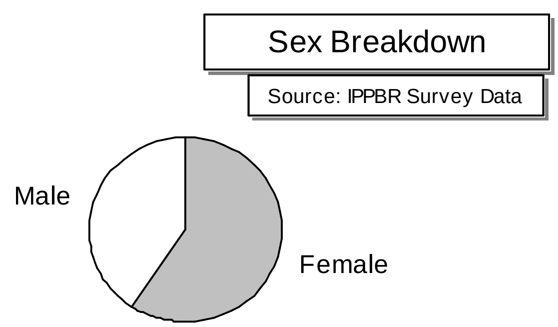


This question was asked in response to a specific concern about the perceived popularity of this growing entertainment option and the concern over diversion of sales tax revenue out of Douglas County. All those who took the survey were asked this question. It was found that 121 out of 407 respondents (30%) have visited a casino at least once within the past year.

DEMOGRAPHIC QUESTIONS

Question 8. *Sex (This question was not asked, but based on voice recognition by the surveyors.)*

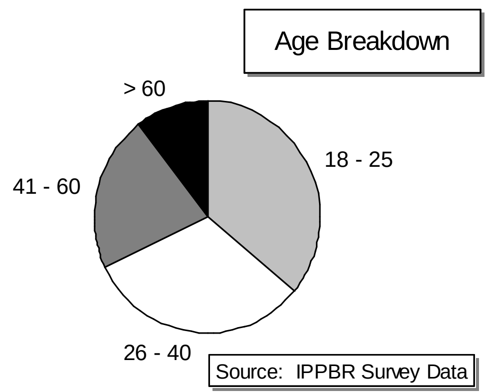
There were 242 female respondents (59.5%) and 165 male respondents (40.5%) out of the total of 407 people who took this survey.



Question 9. *What is your age group?*

The age breakdown of the 406 respondents was as follows: (there was one refusal)

Category	Number	Percent
18 to 25 years old	146	36%
26 to 41 years old	130	32%
41 to 60 years old	88	22%
Over 60 years old	42	10%

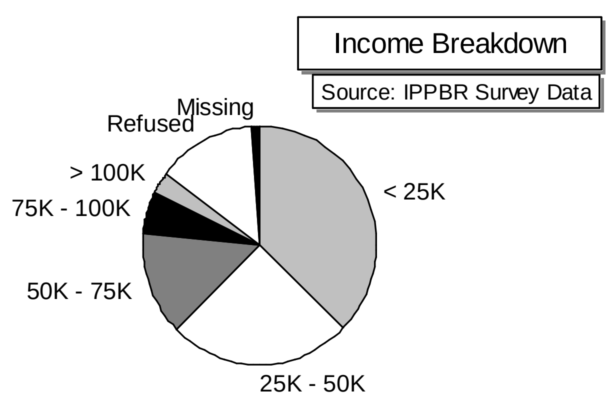


Question 10. *And finally, which best describes your annual before tax (household) income?*

This is a question that many respondents consider too sensitive to answer. For this reason it is always placed last. It is always used strictly for cross tabulating data, to look for interesting trends and facts. The breakdown of responses is:

Category	Number	Percent
Less than $25,000	151	37%
$25,000 to $50,000	104	26%
$50,001 to $75,000	57	14%
$75,001 to $100,000	23	6%
Over $100,000	12	3%
Refused	56	14%
Missing	4	1%

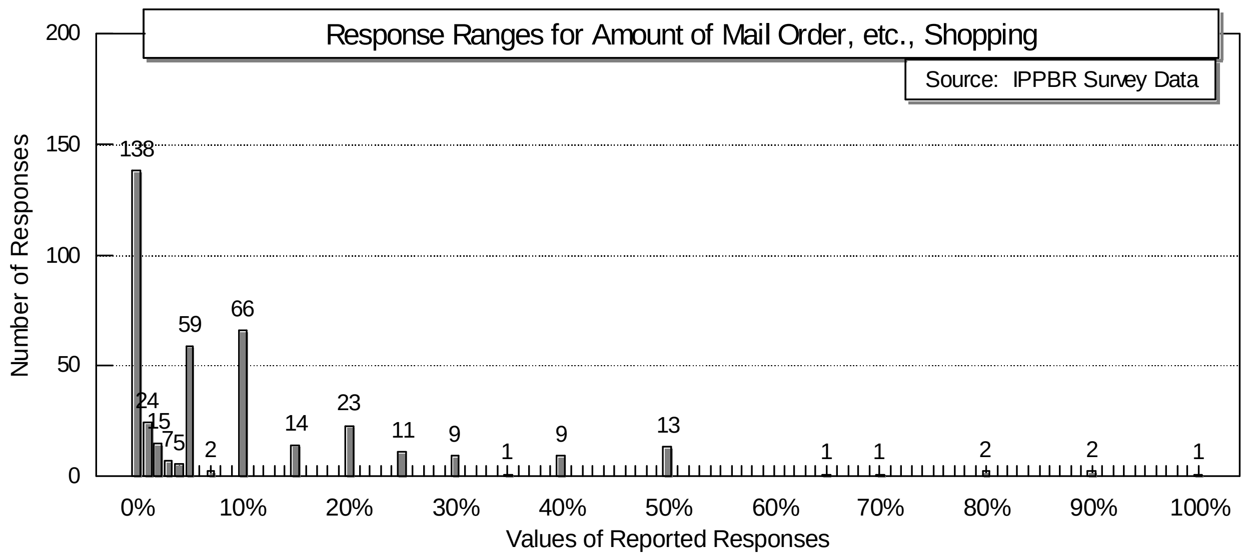
In general, missing or refused answers are not included in the analysis. However, due to the large size of the Refused number, it has been included in some of the cross-tabulations just to see if those respondents would verify or refute the general trends of the others.



This concludes our survey.
Thank you.

DATA TABLES & GRAPHS

Graph of Question 1 data. This graph shows the distribution of the actual responses to this question. Read as follows: 66 respondents reported that they did 10% of their shopping using these alternative means and one person said he did 100% of his shopping this way.



Graph of Question 2 data. This graph shows the distribution of the actual responses to this question. Read as follows: 61 people said they did NO shopping outside Lawrence and 64 people said they did half of their shopping outside Lawrence. Since there were 407 respondents, this accounts for 14.9% and 15.7%, respectively.

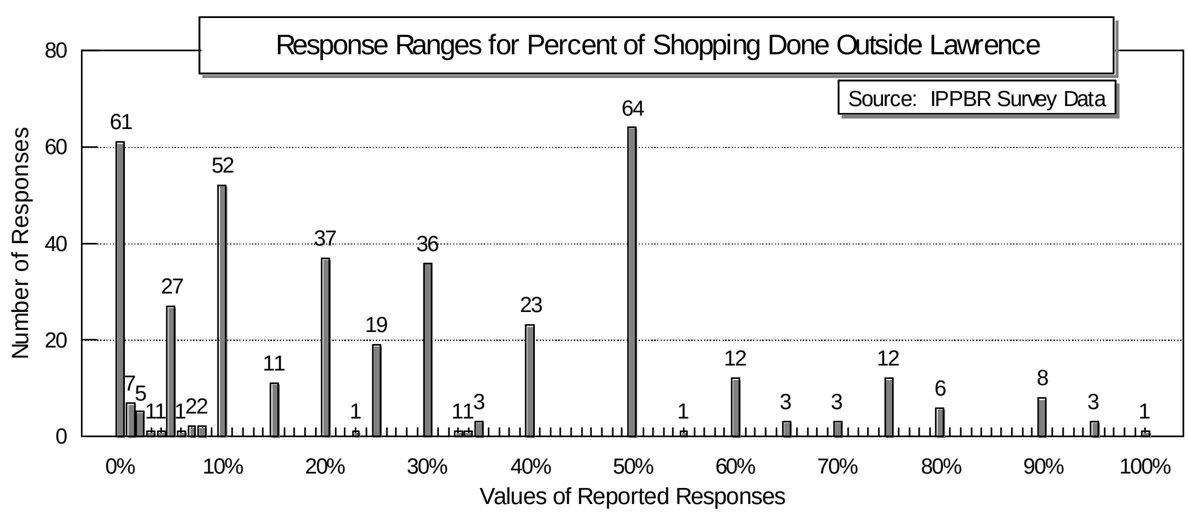


Table 1 - Basic data from question 3.

Destinations and Percentage of the General Population	Percent of Those Asked Who Go To These Destinations	Average Number of Trips Made per Year	Percent of Their Total Shopping That Is Done There	Valid Cases
Topeka	(202) 60.1%	10.3	12.5%	336
Population %	49.6%	5.1	6.1%	407
Johnson County	(301) 88.5%	17.9	25.7%	340
Population %	74.0%	13.2	19.2%	407
Kansas City	(174) 53.5%	9.9	13.3%	325
Population %	42.8%	4.2	5.6%	407
Other Places	(70) 21.2%	9.2	20.9%	330
Population %	17.2%	1.6	3.7%	407

Source: IPPBR Survey Data

The top row of each of these location pairs reflects the responses by those who were asked this question: those who answered in the affirmative on Question 2. This answer was that they did, in fact, do some portion of their shopping outside Lawrence. If they answered negatively to Question 2, that they did not do any of their shopping outside Lawrence, then the surveyors skipped to Question 7.

The second row reflects the calculated result of the summations provided by those who were asked this question divided by the entire sample size of 407. This provides a percentage applicable to the population as a whole.

Therefore, it is safe to say, for example, that about 74% of Lawrence residents intentionally go to the Johnson County area for the purpose of shopping, that they go there slightly more frequently than once a month and they ultimately do almost 20% of their total shopping in the stores there.

Table 2 - Basic data from question 5.

Goods and Services Sought	Number of times mentioned	Percentage of those asked this question	Percentage of the general population
Medical Services	103	29.8%	25.3%
Grocery/ Household Supplies	42	12.1%	10.3%
Appliances/ Home Furnishings	166	48.0%	40.8%
Clothing/Apparel	273	78.9%	67.1%
Automobile Purchases	127	36.7%	31.2%
Automobile Parts and/or Service	84	24.3%	20.6%
Theater/Movies/Concerts	109	31.5%	26.8%
Restaurants	232	67.1%	57.0%
Electronics/Computers	186	53.8%	45.7%
Books/Gifts	176	50.9%	43.2%
Sporting Events	172	49.7%	42.3%
Other Reasons	18	5.2%	4.4%

Source: IPPBR Survey Data

This table should be read as follows:

> The category of Clothing and Apparel was mentioned by 273 respondents, almost 79% of those who were asked this question, as something for which they intentionally leave Lawrence to shop. Extending this rate to the general population means that over 67% of Lawrence residents find it necessary to shop out-of-town to fulfill their clothing needs.

Table 3 - Basic data from question 6.

Reasons	Number of times mentioned	Percentage of those asked this question	Percentage of the general population
Prices	96	27.8%	23.6%
Quality of Merchandise	64	18.6%	15.7%
Variety of Selection	261	75.7%	64.1%
Quality of Service	58	16.8%	14.3%
Other Reasons	78	22.6%	19.2%

Source: IPPBR Survey Data

This table should be read as follows:

The reason "Variety of Selection" was mentioned by 261 respondents, representing almost 76% of those who were asked this question. Taken to the population as a whole, this calculates out to over 64% of the residents of Lawrence consider this an important factor in their shopping decisions.

Table 4 - Basic data from question 8.

Sex	Number	Percent of Total
Female	242	59.5%
Male	165	40.5%

Source: IPPBR Survey Data

Table 5 - Basic data from question 9.

Age	Number	Percent of Total
Age 18 - 25 yrs.	146	35.9%
Age 26 - 40 yrs.	130	31.9%
Age 41 - 60 yrs.	88	21.6%
Age > 60 yrs.	42	10.2%
Refused	1	0.2

Source: IPPBR Survey Data

Table 6 - Basic data from question 10.

Income	Number	Percent of Total
Income < $25K	151	37.1%
$25,000 to $50,000	104	25.6%
$50,001 to 75,000	57	14.0%
$75,001 to $100,000	23	5.7%
Over $100,000	12	2.9%
Refused	56	13.8%
Missing	4	1.0%

Source: IPPBR Survey Data

DATA COMPARISONS

Table 7 - Cross-tabulation of questions 1 & 2 with demographics.

Percent of Shopping Outside Lawrence	Q1. Shopping via catalog, mail order, TV, Internet, etc.	Valid Cases	Q2. Shopping at Out of Town Retail Sites	Valid Cases
Female	11.0	239	32.9	203
Male	7.8	164	31.8	141
Age 18 - 25 yrs.	6.4	145	41.7	130
Age 26 - 40 yrs.	10.1	130	26.3	114
Age 41 - 60 yrs.	13.4	87	29.1	73
Age > 60 yrs.	12.3	40	22.3	27
Income < $25K	7.3	150	37.6	118
$25K - $50K	8.6	103	27.7	89
$50K - $75K	11.0	57	33.4	53
$75K - $100K	13.4	22	37.4	22
Income > $100K	11.5	12	27.5	12
Income $ refused	15.2	55	24.7	47

Source: IPPBR Survey Data

This table should be read as follows:

> For question 1, respondents between the ages of 41 and 60 reported that they did, on average, over 13% of their total shopping by methods that do not involve retail stores, such as mail order, Internet or television.
>
> For question 2, respondents with household incomes below $25,000 reported that they did almost 38% of their shopping outside Lawrence. The percentage of total shopping for those earning between $75,000 and $100,000 was only slightly less.

Table 8 - Cross-tabulation of question 3a (destinations) with demographics.

Topeka	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
Female	9.8	130	14.4	128
Male	11.2	72	9.0	72
Age 18 - 25 yrs.	9.6	61	12.7	59
Age 26 - 40 yrs.	11.3	73	12.1	71
Age 41 - 60 yrs.	9.8	51	11.9	52
Age > 60 yrs.	9.7	17	14.5	18
Income < $25K	7.4	52	10.2	51
$25K - $50K	10.1	58	11.4	59
$50K - $75K	13.8	40	15.7	39
$75K - $100K	7.4	17	11.1	17
Income > $100K	11.6	5	8.4	5
Income $ refused	11.1	29	14.5	28

Source: IPPBR Survey Data

Read this series of tables as follows:

> Respondents between the ages of 26 and 40 made over 11 trips per year, slightly less than once per month, on average, to Topeka for the purpose of shopping where they did over 12% of their total shopping.

Table 9 - Cross-tabulation of question 3b (destinations) with demographics.

Johnson County	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
Female	14.2	174	24.7	176
Male	23.0	127	27.1	128
Age 18 - 25 yrs.	20.0	116	33.1	118
Age 26 - 40 yrs.	16.5	98	22.1	99
Age 41 - 60 yrs.	14.8	64	20.1	64
Age > 60 yrs.	21.3	23	19.2	23
Income < $25K	17.2	103	30.4	105
$25K - $50K	18.1	82	21.8	84
$50K - $75K	21.1	47	26.6	46
$75K - $100K	20.2	19	29.8	19
Income > $100K	24.7	10	17.7	10
Income $ refused	11.8	39	20.2	39

Source: IPPBR Survey Data

Table 10 - Cross-tabulation of question 3c (destinations) with demographics.

Kansas City	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
Female	8.4	97	13.0	98
Male	11.8	77	13.6	74
Age 18 - 25 yrs.	9.0	83	14.0	82
Age 26 - 40 yrs.	9.1	56	11.4	56
Age 41 - 60 yrs.	13.6	27	16.8	26
Age > 60 yrs.	13.1	8	7.4	8
Income < $25K	8.5	77	11.2	81
$25K - $50K	10.4	44	10.7	43
$50K - $75K	14.1	21	19.0	20
$75K - $100K	13.7	12	19.7	12
Income > $100K	6.0	6	3.7	6
Income $ refused	8.9	13	19.5	12

Source: IPPBR Survey Data

Table 11 - Cross-tabulation of question 3d (destinations) with demographics.

Other Places	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
Female	9.1	46	24.0	48
Male	9.5	24	14.7	24
Age 18 - 25 yrs.	10.1	32	31.4	36
Age 26 - 40 yrs.	9.9	21	8.2	21
Age 41 - 60 yrs.	7.9	13	14.9	11
Age > 60 yrs.	3.5	4	9.0	4
Income < $25K	10	26	32.8	30
$25K - $50K	10.5	15	13.6	14
$50K - $75K	13.7	9	12.0	9
$75K - $100K	2.8	4	6.3	3
Income > $100K	8.2	6	11.8	6
Income $ refused	4.7	10	13.1	10

Source: IPPBR Survey Data

Table 12 - Cross-tabulation of question 5 with demographics. p. 1 of 4

Goods or Services Sought	Medical	Grocery/ Household	Appliances/ Home Furnishings	Valid Cases
Female	66 (32.4%)	24 (11.8%)	93 (45.6%)	204
Male	37 (26.1%)	18 (12.7%)	73 (51.4%)	142
Age 18 - 25 yrs.	51 (38.6%)	11 (8.3%)	63 (47.7%)	132
Age 26 - 40 yrs.	26 (22.8%)	13 (11.4%)	60 (52.6%)	114
Age 41 - 60 yrs.	16 (21.9%)	14 (19.2%)	39 (53.4%)	73
Age > 60 yrs.	10 (37.0%)	4 (14.8%)	4 (14.8%)	27
Income < $25K	43 (35.8%)	5 (4.2%)	52 (43.3%)	120
$25K - $50K	20 (22.2%)	13 (14.4%)	37 (41.1%)	90
$50K - $75K	15 (28.3%)	8 (15.1%)	37 (69.8%)	53
$75K - $100K	8 (36.4%)	7 (31.8%)	13 (59.1%)	22
Income > $100K	2 (16.7%)	0	5 (41.7%)	12
Income $ refused	14 (30.4%)	9 (19.6%)	21 (45.7%)	46

Source: IPPBR Survey Data

Read the this series of tables as follows:

> Of the 90 respondents with household earnings between $50,000 and $75,000 who were asked this question, 37 reported appliances and home furnishings as one of the categories that they shopped for outside Lawrence. This is a “mention rate” of almost 70%. Although this has not been calculated out to a percentage of this income category of all of the residents of Lawrence, it provides the information that of the income categories listed, the people in this category are most likely to look to other sources for their home furnishing needs.

Table 12 - Cross-tabulation of question 5 with demographics. p. 2 of 4

Goods or Services Sought	Clothing/ Apparel	Auto Purchase	Auto Parts or Service	Valid Cases
Female	164 (80.4%)	77 (37.7%)	53 (26.0%)	204
Male	109 (76.8%)	50 (35.2%)	31 (21.8%)	142
Age 18 - 25 yrs.	111 (84.1%)	53 (40.2%)	46 (34.8%)	132
Age 26 - 40 yrs.	88 (77.2%)	44 (38.6%)	23 (20.2%)	114
Age 41 - 60 yrs.	54 (74.0%)	25 (34.2%)	13 (17.8%)	73
Age > 60 yrs.	20 (74.1%)	5 (18.5%)	2 (7.4%)	27
Income < $25K	101 (84.2%)	44 (36.7%)	38 (31.7%)	120
$25K - $50K	68 (75.6%)	29 (32.2%)	17 (18.9%)	90
$50K - $75K	42 (79.2%)	25 (47.2%)	12 (22.6%)	53
$75K - $100K	16 (72.7%)	10 (45.5%)	3 (13.6%)	22
Income > $100K	11 (91.7%)	3 (25.0%)	2 (16.7%)	12
Income $ refused	33 (71.7%)	15 (32.6%)	11 (23.9%)	46

Source: IPPBR Survey Data

Table 12 - Cross-tabulation of question 5 with demographics. p. 3 of 4

Goods or Services Sought	Movies/ Theater/ Concerts	Restaurants	Electronics/ Computers	Valid Cases
Female	51 (25.0%)	131 (64.2%)	101 (49.5%)	204
Male	58 (40.8%)	101 (71.1%)	85 (59.9%)	142
Age 18 - 25 yrs.	55 (41.7%)	90 (68.2%)	65 (49.2%)	132
Age 26 - 40 yrs.	32 (28.1%)	84 (73.7%)	69 (60.5%)	114
Age 41 - 60 yrs.	17 (23.3%)	46 (63.0%)	44 (60.3%)	73
Age > 60 yrs.	5 (18.5%)	12 (44.4%)	8 (29.6%)	27
Income < $25K	51 (42.5%)	75 (62.5%)	51 (42.5%)	120
$25K - $50K	22 (24.4%)	59 (65.6%)	43 (47.8%)	90
$50K - $75K	14 (26.4%)	39 (73.6%)	42 (79.2%)	53
$75K - $100K	5 (22.7%)	16 (72.7%)	17 (77.3%)	22
Income > $100K	2 (16.7%)	10 (83.3%)	9 (75.0%)	12
Income $ refused	13 (28.3%)	31 (67.4%)	22 (47.8%)	46

Source: IPPBR Survey Data

Table 12 - Cross-tabulation of question 5 with demographics. p. 4 of 4

Goods or Services Sought	Books & Gifts	Sporting Events	Other	Valid Cases
Female	97 (47.5%)	87 (42.6%)	8 (3.9%)	204
Male	79 (55.6%)	85 (59.9%)	10 (7.0%)	142
Age 18 - 25 yrs.	66 (50.0%)	75 (56.8%)	3 (2.3%)	132
Age 26 - 40 yrs.	64 (56.1%)	59 (51.8%)	10 (8.8%)	114
Age 41 - 60 yrs.	36 (49.3%)	32 (43.8%)	5 (6.8%)	73
Age > 60 yrs.	10 (37.0%)	6 (22.2%)	0	27
Income < $25K	59 (49.2%)	54 (45.0%)	3 (2.5%)	120
$25K - $50K	43 (47.8%)	45 (50.0%)	5 (5.6%)	90
$50K - $75K	31 (58.5%)	34 (64.2%)	2 (3.8%)	53
$75K - $100K	12 (54.5%)	12 (54.5%)	1 (4.5%)	22
Income > $100K	9 (75.0%)	5 (41.7%)	0	12
Income $ refused	21 (45.7%)	21 (45.7%)	6 (13.0%)	46

Source: IPPBR Survey Data

Table 13 - Cross-tabulation of question 6 with demographics. p. 1 of 2

Reasons	Price	Quality of Merchandise	Variety of Selection	Valid Cases
Female	47 (23.0%)	43 (21.1%)	163 (79.9%)	204
Male	49 (34.8%)	21 (14.9%)	98 (69.5%)	141
Age 18 - 25 yrs.	31 (23.5%)	21 (15.9%)	100 (75.8%)	132
Age 26 - 40 yrs.	37 (32.7%)	19 (16.8%)	90 (79.6%)	113
Age 41 - 60 yrs.	25 (34.2%)	19 (26.0%)	56 (76.7%)	73
Age > 60 yrs.	3 (11.1%)	5 (18.5%)	15 (55.6%)	27
Income < $25K	28 (23.3%)	22 (18.3%)	86 (71.7%)	120
$25K - $50K	24 (26.7%)	11 (12.2%)	67 (74.4%)	90
$50K - $75K	20 (37.7%)	10 (18.9%)	43 (81.1%)	53
$75K - $100K	9 (40.9%)	6 (27.3%)	21 (95.5%)	22
Income > $100K	1 (9.1%)	5 (45.5%)	11 (100%)	11
Income $ refused	14 (30.4%)	9 (19.6%)	32 (69.6%)	46

Source: IPPBR Survey Data

Read this pair of tables as follows:

> Of the respondents who mentioned price as a deciding factor in choosing a shopping location outside Lawrence, males outnumbered females. While only 23% of female respondents mentioned price, it was mentioned by 35% of male respondents.

Table 13 - Cross-tabulation of question 6 with demographics. p. 2 of 2

Reasons	Quality of Service	Other Reasons	Valid Cases
Female	33 (16.2%)	49 (24.0%)	204
Male	25 (17.7%)	29 (20.6%)	141
Age 18 - 25 yrs.	21 (15.9%)	28 (21.2%)	132
Age 26 - 40 yrs.	19 (16.8%)	19 (16.8%)	113
Age 41 - 60 yrs.	15 (20.5%)	19 (26.0%)	73
Age > 60 yrs.	3 (11.1%)	12 (44.4%)	27
Income < $25K	21 (17.5%)	24 (20.0)	120
$25K - $50K	12 (13.3%)	21 (23.3%)	90
$50K - $75K	13 (24.5%)	18 (34.0%)	53
$75K - $100K	4 (18.2%)	3 (13.6%)	22
Income > $100K	1 (9.1%)	0	11
Income $ refused	6 (13.0%)	11 (23.9%)	46

Source: IPPBR Survey Data

Table 14 - Cross-tabulation of question 7 with demographics.

Casino Visits	Have visited in Past Year	Valid Cases
Female	[69] 28.6%	241
Male	[52] 31.5%	165
Age 18 - 25 yrs.	[48] 32.9%	146
Age 26 - 40 yrs.	[35] 26.9%	130
Age 41 - 60 yrs.	[27] 30.7%	88
Age > 60 yrs.	[11] 26.8%	41
Income < $25K	[45] 29.8%	151
$25K - $50K	[25] 24.0%	104
$50K - $75K	[24] 42.1%	57
$75K - $100K	[8] 4.8%	23
Income > $100K	[5] 41.7%	12
Income $ refused	[13] 23.2%	56

Source: IPPBR Survey Data

A total of 121 people, out of 407 asked, reported that they had been to a casino in the Kansas City area within the last year. This cross tabulation compares the numbers within each demographic category that reported visiting a casino with the total number of respondents within that category. Read the tables as follows:

> One-third of respondents between the ages of 18 and 25 reported visiting a casino in the Kansas City area in the past year, and
>
> Over 42% of those with incomes between $50,000 and $75,000 visited a casino within the past year.

RECOMMENDATIONS FOR YEAR 2 SURVEY

This survey will be conducted again between Thanksgiving and Christmas 1997. The hope is that any impact on the Lawrence community by the Great Mall of the Great Plains in Olathe and other new retail choices will be clear when compared against the baseline provided by this year's survey.

There have been discussions regarding additional demographic data that would be informative if the questions could be added to the survey without significantly affecting the survey's length. As a result, several new questions will appear on the upcoming survey.

- A question will be added to determine if any of the heads of the household are students at the University of Kansas.

- A question will be added to determine if any of the heads of the household work outside Lawrence and what type of job they hold. This will allow a determination of the work location correlating with the shopping preference location.

- The question on casinos will be modified to add a request for the number of times the respondent has visited a casino in the past year.

CONCLUSION

There is great interest in the financial health of the City of Lawrence by local public officials and by the University. The University is proud to be able to work closely with the City and Chamber officials to provide these data in support of their goals.

It is important to add that the University is committed to maintaining the confidentiality of the respondents. The reader of this report should note that there are no ways to trace information obtained from any of these questions to any individual or group. The computer table with the recorded individual responses has no identifying fields. Even the phone numbers dialed to speak to these people are not recorded. Even so, the file is kept by IPPBR and not disseminated in any ways other that those reported in this document.

As this survey is refined and repeated over the years, there will be hard data to be used in identifying trends in the retail universe. Information from hard data is always better than from rumors or speculation, when it can be had. It is our hope that this effort will benefit all of the residents and businesses of Lawrence.