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

Retail Preferences Survey Report #3

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

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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.

This is the third year this study has been conducted. The previous reports were released in October 1997 and November of 1998 and are available for purchase through KU-IPPBR as Research Papers #240 and #252.

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HIGHLIGHTS

→ The majority of indicators measured by this survey indicate that there is a trend toward a reduction in the amount of shopping that Lawrence residents do outside the city.

→ Approximately 30 percent of the shopping dollars spent by the residents of Lawrence go outside the city, down from 33 percent and 34.5 percent reported in 1997 and 1996, respectively.

→ The average amount of shopping that is done via mail order or catalog service, a television shopping channel, or the Internet decreased in 1998 to 7.8 percent from 10.2 percent in 1997 and 9.7 percent in 1996.

→ The number of those who did up to 5 percent of their shopping via alternative sources increased to 32 percent compared to 26 percent in 1997 and 27 percent in 1996. The number of those who did more than 10 percent of their shopping through catalogs, mail order or Internet decreased from both 1997 and 1996.

→ In 1998 82 percent of those surveyed did some of their shopping outside Lawrence compared to 81 percent and 85 percent reported in 1997 and 1996 surveys, respectively.

→ The number of people who did not shop outside of Lawrence decreased to 18 percent in 1998 compared to 19 percent in 1997 but was still higher than the 15 percent in 1996. The number of people who did up to 10 percent of their shopping outside Lawrence increased. The number of people who did between 10 and 25 percent of their shopping outside Lawrence stayed almost on the same level as in 1997. The number of people who did more than 25 percent of their shopping outside Lawrence decreased.

→ Johnson County was the most popular destination once again, with 70 percent of all respondents reporting it as a place they visit, accounting for 16 percent of their average total shopping, and going there an average of 11 times per year. In 1997 and 1996 these numbers totaled 66 percent and 74 percent, 13 percent and 19 percent, and 10 and 13 times, respectively.

→ This year once again the Oak Park Mall was the most popular shopping place. It was mentioned by 53 percent of respondents who did at least some of their shopping outside Lawrence. In 1997 and 1996 these numbers were 42 percent and 50 percent, respectively. This figure could be higher, since some people reported street locations or general areas instead of names.

→ Dillard's once again was the most frequently mentioned store, mentioned by 31 percent of respondents who did at least some of their shopping outside Lawrence (vs. 22 percent and 26 percent in 1997 and 1996, respectively).

→ Clothing/apparel again was the most frequently mentioned category of merchandise or service, with a response rate corresponding to 56 percent (vs. 61 percent and 67 percent in 1997 and 1996, respectively) of the Lawrence population.

→ Variety of selection was once again the most frequently mentioned reason for shopping outside Lawrence, with a report rate representing 57 percent of the general population (vs. 55 percent and 64 percent in 1997 and 1996, respectively).

→ This year 7 percent of the population mentioned quality of merchandise as one of the reasons for shopping outside Lawrence (vs. 20 percent in 1997 and 16 percent in 1996). Quality of service was mentioned by 3 percent of the population this year (vs. 9 percent in 1997 and 14 percent in 1996).

→ In 1998 428 out of 1260 respondents reported visiting a casino at least once in the past year, representing 34 percent of the population, up from the 33 percent and 30 percent reported in 1997 and 1996, respectively. On average, those who go to the casinos did so 6 times within this past year, compared to 4 times in 1997. This year the question was modified to include not only casinos in the Kansas City area, but also all casinos in Kansas.

→ Out of all households surveyed in 1998, 25 percent have at least one person commuting to work outside Douglas County. In 1997, when the question was first asked the response rate was slightly below 21 percent.

→ Out of fifteen different counties mentioned as commuters' destinations, most frequently named was Johnson County with 43 percent (up from 40 percent last year). Shawnee County (Topeka) was mentioned by 21 percent this year (down from 33 percent in 1997). The Kansas City area was mentioned by 19 percent of commuters, which is almost three times the 7 percent rate reported in 1997. This increase could be partially attributed to the different interpretation of city boundaries (this year the entire Kansas City MSA was included).

→ Results change when you eliminate households without students and commuters. These results begin on page 32.

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 and 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. This is the third time this survey has been conducted. Comparisons are made throughout regarding the changes from the previous sampling. The data were collected between Thanksgiving and Christmas 1998.

DISCUSSION

Retail sales are the lifeblood 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.

In order to identify the trends and dynamics at work, this data collection survey was established with the intent that it be repeated regularly. It is a more concrete way to pin down which way the dollars are flowing, rather than just relying on fears or feelings. It is hoped that local businesses will see results of this survey 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.

In addition, data were gathered regarding where respondents go to work if they leave Douglas County and what jobs the commuters hold.

METHODOLOGY

A telephone survey was conducted during the Christmas shopping season asking Lawrence residents 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. This year responses numbered 1260, 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 respondents who mentioned an item.

In the same vein, the section regarding the percent of each respondent's total shopping that is done in various locations was not forced to add up to 100 percent. 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.

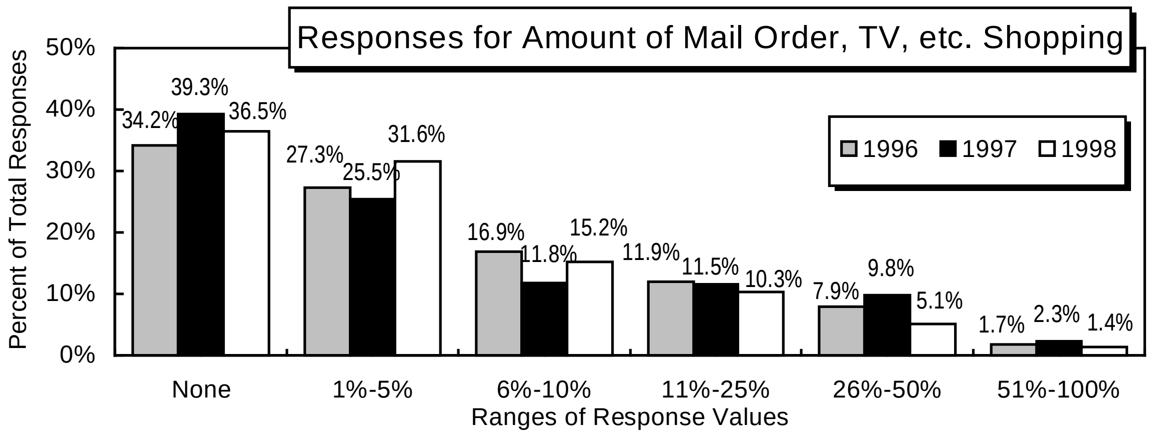
Data collected were analyzed in the SPSS statistical software program as frequency distributions. Cross tabulations were performed as frequency distributions with cases selected based on the demographic variables.

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 starting on page 24.

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 is being lost to "distance retailers," those who do not have a physical presence in any particular community. Among these are mail order catalogs, shopping channels on television, and Internet shopping services.

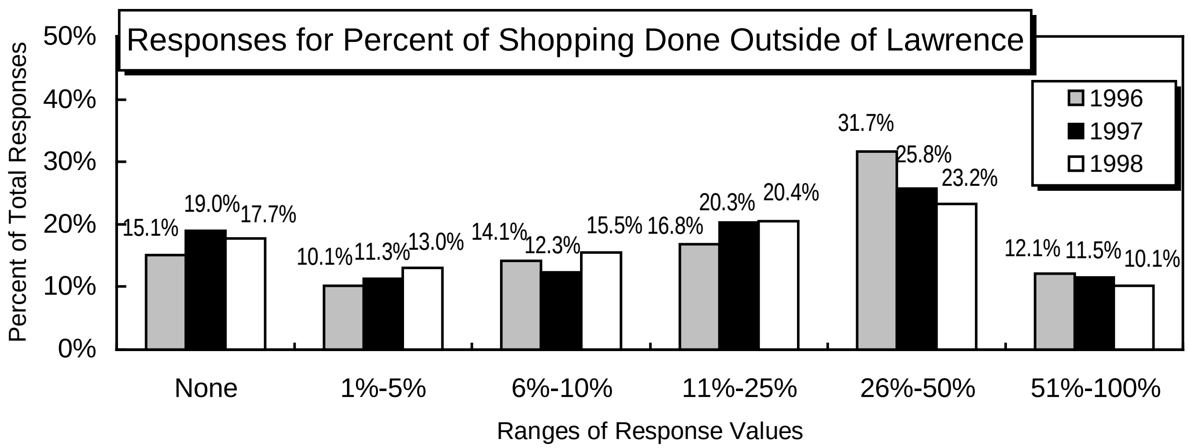


Out of 1260 people asked this question 1257 responded. Out of 1257 responses 36.5 percent (459) reported none of their shopping was done through these alternative sources, an almost 3 percent decrease from the 39.3 percent reported in 1997. Out of 63.5 percent (798) that reported shopping through these "distant retailers" the number of those who did up to 10 percent of their shopping this way increased since 1997. At the same time the number of those who did more than 10 percent via "distant retailers" decreased since 1997, as can be seen on the graph. This trend is opposite to the 1997 survey results. The average amount of shopping that is done via mail order or catalog service, television shopping channel, or the Internet decreased in 1998 to 7.8 percent from 10.2 percent in 1997 and 9.7 percent in 1996. A detailed graph of the distribution of these responses is shown on page 24.

Question 2. *Of the remaining (100 percent - Q1 percent) percent, 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 one does 10 percent of one's shopping by catalog, how much of the remaining 90 percent is done outside Lawrence? The attempt here is to gauge the direct competition to stores in Lawrence.

Out of 1257 responses 17.7 percent (223) reported doing none or their shopping outside Lawrence. It is a decrease compared to 19 percent and 15.1 percent reported in 1997 and 1996, respectively. The number of those who did at least some of their shopping outside Lawrence increased from 81 percent in 1997 to 82.3 percent in 1998, but it is still lower than the 85 percent reported in 1996. The number of those who did up to 25 percent of their shopping outside Lawrence in 1998 increased compared with both 1997 and 1996. Although 23.2 percent of respondents reported doing between 26 and 50 percent of their



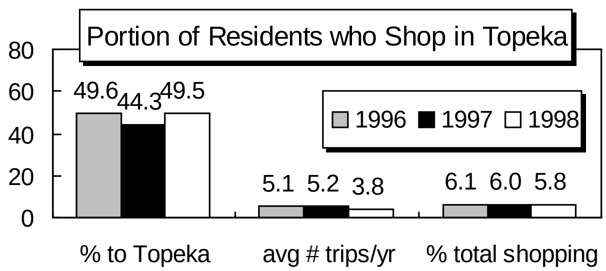
shopping outside Lawrence, which was higher than any other percentage in the category, it was still a decrease from the 25.8 percent reported in 1997. The average amount of shopping outside Lawrence in 1998 was 23.5 percent. It is slightly less than 25.3 percent and 27.6 percent reported in 1997 and 1996 respectively.
A more detailed graph of the distribution of responses appears on page 24.

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 demographic questions, starting with question 7.

Question 3
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 (including the Plaza area).

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.

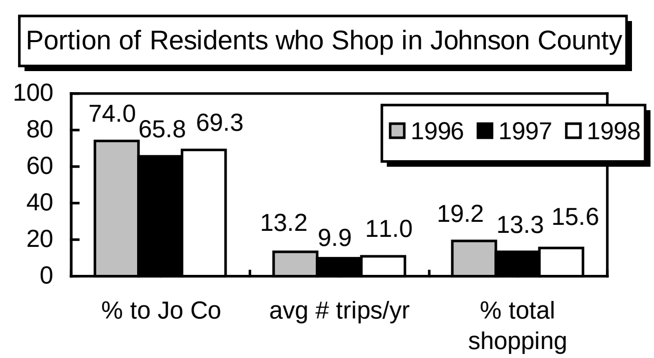
Question 3a1. *How often in the past year did you go to* ***Topeka*** *to shop?*
Question 3a2. What percentage of your total shopping is done in Topeka?



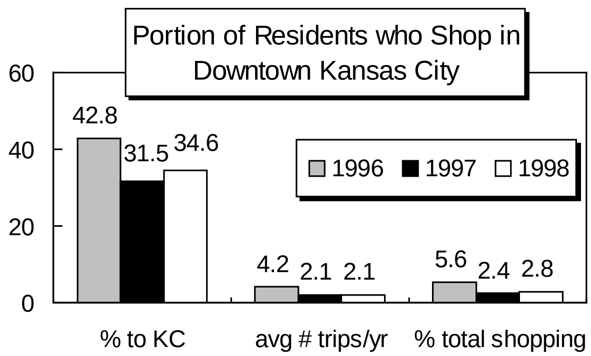
The number of Lawrence residents who did at least some portion of their shopping in Topeka increased from 44.3 percent in 1997 to 49.5 percent in 1998, almost reaching the 1996 level. At the same time an annual average number of shopping trips to Topeka decreased from 5.2 in 1997 to 3.8 trips per person in 1998. These trips account for 5.8 percent of total shopping, which is slightly less than the 6 percent reported in 1997.

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

Johnson County and suburban Kansas City attracted the largest share of shoppers. Almost 70 percent of Lawrence residents reported shopping there in 1998. They reported an annual average of 11 trips per person, which accounted for 15.6 percent of their total shopping.
As can be seen on the graph, this year's results were slightly higher than in 1997 but did not reach the levels of 1996.

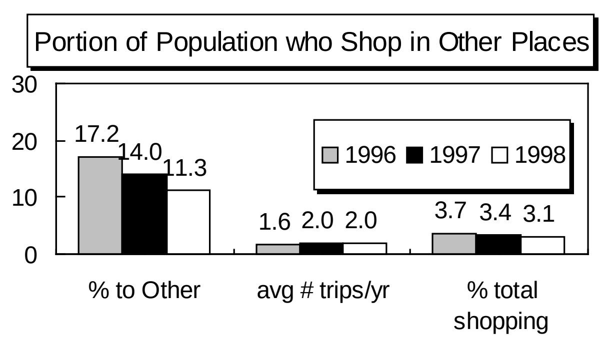


***Question 3c1.** How often in the past year did you go to the **downtown Kansas City** area to shop? This includes the Plaza, etc.*
Question 3c2. What percentage of your shopping is done in downtown Kansas City?



Downtown Kansas City was a slightly more popular shopping destination in 1998 than it was in 1997. The number of residents who went there to shop in 1998 increased to 34.6 percent from 31.5 percent in 1997. An annual average number of trips stayed at 2.1 trip per person, same as in 1997. The percent of total shopping increased from 2.4 percent in 1997 to 2.8 percent in 1998. However, 1998 survey results in all three categories were considerably lower than in 1996. These could be connected with the ongoing construction in downtown Kansas City and the Plaza area.

***Question 3d1.** Are there **other places** outside Lawrence where you regularly go to shop?*
Question 3d2. How often in the past year did you go there?
Question 3d3. What percentage of your total shopping is done in those places?



The number of people going to shop in 1998 in the locations other than those mentioned above decreased to 11.3 percent compared to 14 percent in 1997 and 17.2 percent in 1996. An average number of trips per person stayed at 2 trips per year, same as in 1997. The percent of total shopping decreased slightly from the previous results and reached 3.1 percent.

Following are the places mentioned by the respondents, along with the number of times each was mentioned:

KS, Wichita	29	Georgia	1
Chicago	16	IA, Davenport	1
KS, Ottawa	9	Independence	1
KS, Leavenworth area	6	KS, Emporia	1
NE, Omaha	5	KS, Eudora	1
Colorado	4	KS, Gardner	1
Nebraska	4	KS, Hays	1
St. Louis	4	KS, Hutchinson	1
CO, Denver	3	KS, Independence	1

Dallas	3	KS, Junction City	1
Minnesota	3	KS, Leawood	1
Missouri	3	KS, Olathe	1
MO, Springfield	3	KS, Perry	1
North Kansas City area	3	KS, Pittsburg	1
KS, Lake of the Ozarks	2	KS, Tonganoxie	1
KS, Salina	2	KS, Valley Falls	1
Manhattan	2	KY, Bowling Green	1
MO, Independence	2	London	1
MO, Joplin	2	Los Angeles	1
New York state	2	Michigan	1
Oklahoma	2	Mississippi	1
Pennsylvania	2	MO, Odessa	1
Alabama	1	San Francisco	1
Blue Springs	1	South Carolina	1
Brazil	1	Springfield	1
Brookside	1	Texas	1
Edwards County	1	Virginia	1
Eureka Springs	1	Wisconsin	1

The number of times destinations were mentioned should not be compared with the number of times corresponding places were mentioned in the previous reports because of the considerably higher number of responses in this year's survey.

The fact that several distant states, indeed continents, were mentioned in these responses leads to speculation that these respondents either misunderstood the question or have exceedingly strong shopping preferences. The data collected for this report included a count of households with KU Students in a decision-making role. It is possible that some of them do a measure of their shopping while "at home" on break.

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 other Kansas or Missouri locations were mentioned.

Next, we wanted to determine the types of shopping centers and specific stores that our residents sought out for their shopping. Question 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 centers 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. A much larger variety of places was mentioned this year, reflecting some of the newer centers as well as the larger number of respondents. Below is the list of the most popular locations sorted by number of times it was mentioned. A complete list of shopping destinations is available on page 26.

Location	Mentioned By	Location	Mentioned By
Oak Park Mall	547	Westport	14
Westridge Mall	299	95th and Metcalf	12
The Plaza	129	Town East, Wichita	10
Great Mall of the Great Plains	105	119th and Roe	9
Town Center	95	Metro North Mall	9
Metcalf	54	Independence Center	8
Wanamaker Rd., Topeka	52	Country Club Plaza	7
Metcalf South Mall	41	White Lakes Mall	7
95th and Quivira	24	75th Street	6
119th Street	22	Mission Mall	6
95th Street	18	Overland Park	6
Bannister Mall	18	West Lake Mall	6
Quivira	17	21st Street, Topeka	5
119th and Metcalf	14	Crown Center	5

This year once again the Oak Park Mall was the most popular shopping place. It was mentioned by 52.9 percent of respondents who were asked this question. In 1997 and 1996 these numbers were 42 percent and 50 percent, respectively. This figure could be higher, since some people reported street locations or general areas instead of names.

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.

Dillard’s	322	Great Train Co.	2
Sam's Club	138	Guitar Center	2
JC Penney	130	Harley Davidson	2
Best Buy	122	Harold	2
Jones Store	122	Harold Penner	2
Old Navy	91	Home Improvement Stores	2
GAP	88	Homequarter	2
Sears	86	Imagery	2

Nordstrom’s	65	June's	2
Toys’R’Us	63	Kaybee	2
Eddie Bauer	49	Kay’s Jewelers	2
WallMart	48	KC Tile	2
Abercrombie & Fitch	41	Maggie Moos'	2
Kohl's	34	Maurices	2
Banana Republic	33	MC Sport	2
Gallions	25	Men's Warehouse	2
Hyper Mart	25	Musicland	2
Limited	24	Neiman Marcus	2
American Eagle	19	Northern Reflections	2
Home Depot	19	Nicole Miller	2
Structure	19	Nigros	2
Express	17	Norwalk Furniture	2
Target	17	Office Supply Stores	2
Circuit City	16	Organized Living	2
Comp USA	16	Osmonds	2
Dillons	16	Parsian	2
Barnes and Noble	15	Peter's Clothiers	2
Lane Bryant	15	Petsmart	2
Montgomery Ward's	15	Photography Places	2
1/2 Price Store	14	Piggly Wiggly	2
Borders	13	Plaid Elephant	2
Pottery Barn	13	Polo	2
Talbot’s	13	Record Stores	2
J Crew	12	Restoration	2
Steinmart	11	Rhodes	2
Benchmark	10	Salvation	2
Builder's Square	10	Sam Goodie	2
Just For Feet	9	Saturn Dealership	2
TG Maxx	9	Shag	2
Buckle	8	Sharps	2
Disney Store	8	Shoe Warehouse	2
Burlington Coat Factory	7	Spencers	2
Champs	7	Star Motors	2
Foot Locker	7	Starbucks	2
Halls	7	Steves Shoes	2
Learners	7	Store Of Knowledge	2
Nature Company	7	Suncoast Video	2
Ann Taylor	6	Supertarget	2
Bed, Bath and Beyond	6	T C Mens Mart	2
JC Penney Outlet Store	6	Tabletop	2
Victoria's Secret	6	Talmans And Talmans	2
Bath And Body Works	5	Temples	2
Gateway	5	Topharle	2
Gymboree	5	Town And Country	2

Harold’s	5	Urban Outfitters	2
Jack Henry	5	Vanity	2
Jacobson's	5	Wild Pair	2
Low’s	5	Wild Oats	2
Sacs	5	Wolfgang	2
Computer Center	4	Woodcraft	2
DEB	4	Yonkers	2
Famous Bar	4	Arthur Bryants	1
Hobby Lobby	4	Casual Corner	1
Hy-Vee	4	Catherine's	1
Lord And Taylor	4	Checkers	1
Once Upon A Child	4	Claires Boutique	1
Price Chopper	4	Coles	1
Sharper Image	4	Converse Outlet	1
Walden Books	4	Craft Store	1
WB Store	4	Dick Blick	1
Whishler’s	4	Famous Barr-St. Louis	1
Armani Exchange	3	FAO Schwartz	1
Babbages	3	Fun ‘N' Games	1
Bacharach	3	Gatekeeper	1
Backwoods	3	Gifts And Accents	1
Bunker	3	Gojos	1
County Seat	3	Guess	1
Follies	3	Hen House	1
Marshall Fields	3	Henry's	1
Patagonia	3	Home Shop	1
Ralph Lauren	3	Homestore	1
Sporting Goods	3	Images	1
Tommy Hilfiger	3	Jamisons	1
Williams-Sonoma	3	Kids’R’Us	1
All That Jazz	2	K-Mart	1
Arizona Trade	2	Little House	1
Art Gallery in the KC Market	2	Lumber Yard	1
Aznir Me	2	Macys’	1
Better Cheddar	2	McDonalds	1
Bishops Small Engine Repair	2	Mister	1
Blockbuster Music	2	Natural Wear	1
Body Shop	2	Office Max	1
Bombay Cafe	2	Olson's	1
Casual Male	2	Orschlen	1
City Market	2	Osh Kosh B Gosh	1
Coffee Selection	2	Parts America	1
Coplands	2	Paxton	1
Crate And Barrel	2	Pier One	1
Crosby	2	Prides	1
Dayton's	2	Radio Shack	1

Department Stores	2	Red Lobster	1
Dollar General	2	Rift	1
Dollar Store	2	Rods' Card Shop	1
Edge Of The Meadow	2	Rue 21	1
Edsupply	2	Specialty Shops	1
Fantasys	2	Super Target	1
Fashions at Large	2	Sutherlands	1
Fireside	2	The Review	1
Food For Less	2	Venture	1
Fredericks of Hollywood	2	Versace	1
Goodwill	2	Walgreens	1

As was the case last year, stores that already exist in Lawrence were occasionally mentioned. For example, Abercrombie & Fitch, Borders, Dillons, Food for Less, Gap, Hy-Vee, JC Penney, Kohl's, Maurices, Pier One, and Super Target. All these stores are available locally. The information from question 6 indicating a very strong preference for a variety of selection as one of the reasons for shopping outside Lawrence might be an explanation and indication of an area of an opportunity.

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

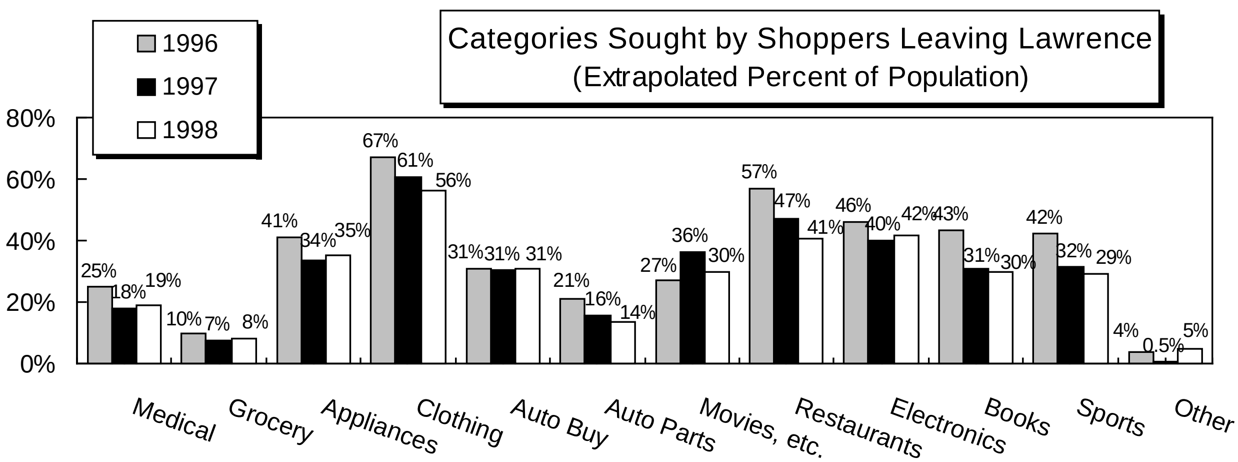
With this question, an attempt was made to identify general classifications of service or merchandise in which respondents felt the out-of-town options were more agreeably available. The category title is listed along with the calculated relevant percentage of the general population from 1997 and 1996. The percent of those asked who reported seeking it out is reported on page 28.

	Percent of Population		
Categories	1998	1997	1996
Medical Services	19%	18%	25%
Grocery/Household Supplies	8%	7%	10%
Appliances/ Home Furnishing	35%	34%	41%
Clothing/Apparel	56%	61%	67%
Automobile Purchase	31%	31%	31%
Auto Parts and/or Service	14%	16%	21%
Theater/Movies/Concerts.	30%	36%	27%
Restaurants	41%	47%	57%
Electronics/Computers	42%	40%	46%
Books/Gifts	30%	31%	43%
Sporting Events	29%	32%	42%
Other Reasons	5%	0.5%	4%

The categories listed in this table reflect a range of products and services that consumers could conceivably 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, if so desired. Once again, only those respondents who answered that they did some portion of their shopping outside Lawrence were asked this question.

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 (56 percent) feel they cannot fulfill all of their clothing needs solely within Lawrence. Pairing this information with the names of store destinations from question 4 highlights a definite area of interest and potential opportunity.

Also high on the list are Electronics / Computers (42 percent mention rate), Restaurants (41 percent), and Appliance / Home furnishing (35 percent). Almost all the categories with a few exceptions decreased this year from both 1997 and 1996. Even those categories that increased from 1997 did not reach the 1996 mention rate. Exceptions were Theater/Movies/Concerts category, which decreased from the 1997 level but was still higher than in 1996, and the Automobile purchase category that did not change over the past three years.



Within the Other Reasons category, the major categories mentioned were specialty supplies, antiques, clubs, recreational activities, toys, and visits to barber/hair salons.

Question 6. *For the categories you've mentioned, what are your reasons for shopping out of 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 reason for shopping outside Lawrence is listed along with the associated percentage of the general population. The percentage of those asked this question who mentioned each particular reason will be listed on page 29.

	Percent of Population		
Reason	1998	1997	1996
Prices	22.7%	23.8%	24.0%
Quality of Merchandise	6.6%	19.5%	16.0%
Variety of Selection	56.7%	55.3%	64.0%
Quality of Service	2.9%	8.5%	14.0%
Change of Pace	8.7%	19.5%	n/a
Convenient to Job	4.4%	7.8%	n/a
Other	18.7%	n/a	19.0%

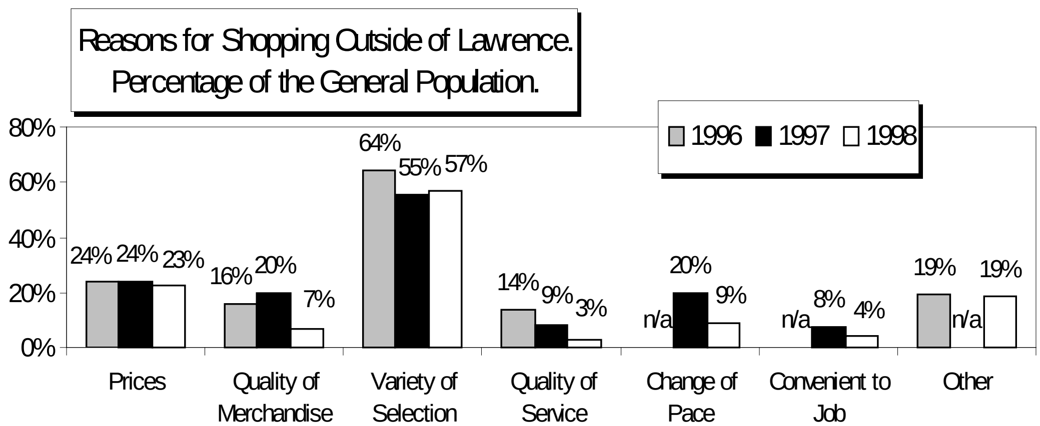
Variety of selection was mentioned by 74.6 percent of respondents in 1998 and once again was the most significant reason for shopping out of Lawrence. Extrapolated on general population, the variety of selection category reported 56.7 percent in 1998, which was higher than 55.3 percent in 1997 but is still below the 64 percent level reported in 1996. An importance of this category as a shopping preference was stressed by the results of question 4, where a number of local stores were named as the shopping destinations outside Lawrence, which indicates that variety of selection in the local stores is not enough. However, a decrease in the mention rate of variety of selection and Clothing/Apparel as the goods sought by shoppers outside Lawrence can be partially due to the opening in Lawrence of new stores: Gap (1997), Kohl's and Sears (1998); and expansion of already existing ones: JC Penney (1998).

All other categories showed decreases compared with both 1997 and 1996 results. Interestingly in 1998 Quality of merchandise and Quality of service categories were mentioned almost three times less than in 1997.

The responses under the "Other reasons" category can be divided into the following:

Availability of specific stores and items	6.5%
Visiting friends and relatives in the area	5.7%
General convenience (happened to be there, etc.)	2.1%
Entertainment, food, sporting and cultural events	1.7%
Parking/crowds/service in downtown Lawrence are unfavorable	1.0%
Familiarity with the area and shops	0.9%
Shopping for holiday gifts	0.4%
Medical and insurance requirements	0.3%
Taxes	0.2%
Other	0.4%

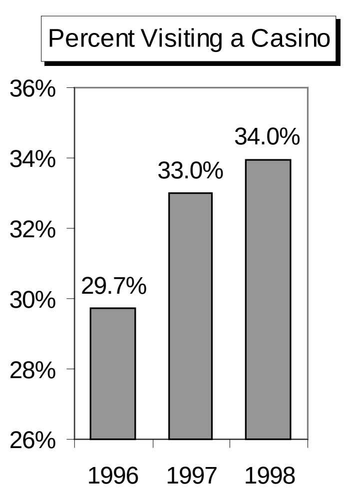
The "Visiting friends and relatives in the area" category negates the intent of the survey, which is to identify where and why people go for the purpose of shopping outside Lawrence. The same can be said about the “General convenience” category. Out of all other reasons mentioned only the “Parking/crowds/service” category can be an influence on the local authorities and businesses. “Parking/crowds/service” category was mentioned by 1 percent of the population in both 1998 and 1997. In 1996 similar reasons were mentioned twice as often.



n/a - in 1996 survey categories “Change of Pace” and “Convenient to Job” were not offered. In 1997 the “Other reasons” category was not mentioned by any respondents.

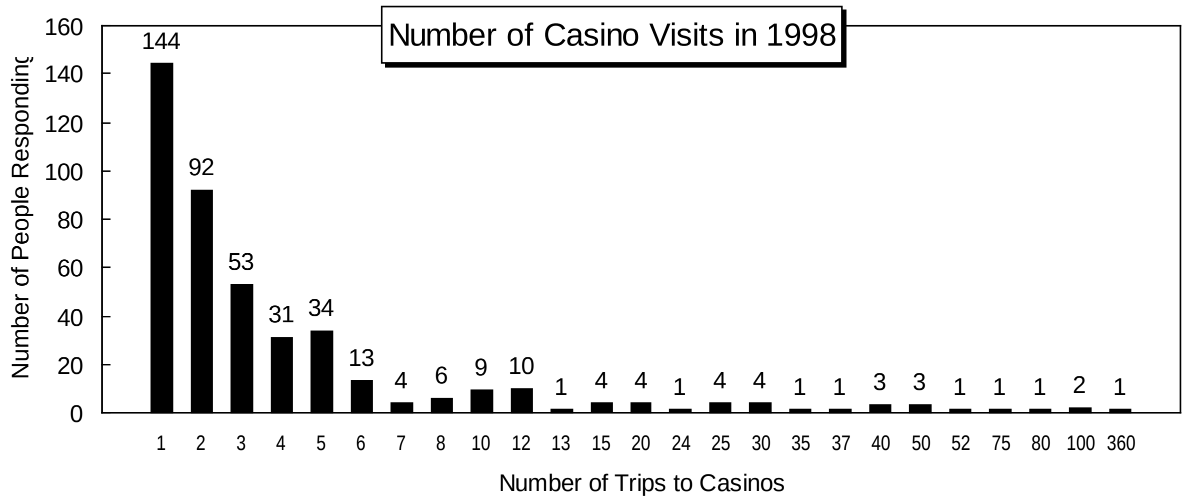
Question 7. *Have you been to a casino in Kansas or the Kansas City area within the past year?* If “Yes”, *How many times?*

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. This year this question was modified to include not only those who go to the casinos in Kansas City area but also those who visited any other casinos in Kansas. All those who took the survey were asked this question.



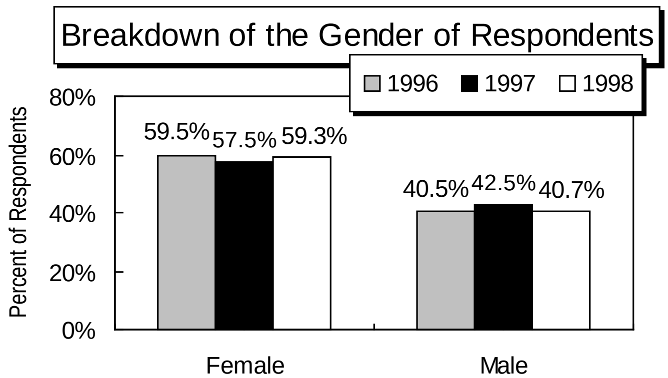
It was found that 34 percent (428) of all asked had visited a casino at least once in 1998, which is more than 33 percent and 30 percent reported in 1997 and 1996, respectively. The increase can be partially attributed to the broader range of the question including casinos not only in the Kansas City area, but also in the entire state of Kansas.

On average, those who go to the casino reported doing so 6 times a year in 1998, which is higher than the four times a year reported in 1997, when the question was first asked. Responses in 1998 ranged from once a year to up to three hundred and sixty times a year, which is rather high but not unthinkable in a sample of more than twelve hundred people. Below is a detailed graph of the responses.



DEMOGRAPHIC QUESTIONS

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



In the 1998 survey, out of 1254 valid responses there were 59.3 percent (743) of female respondents and 40.7 percent (511) male respondents.

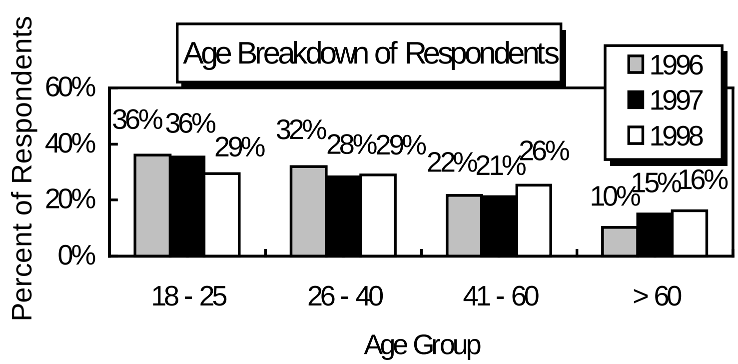
Question 9. *What is your age group?*

The age breakdown of the respondents was as follows:

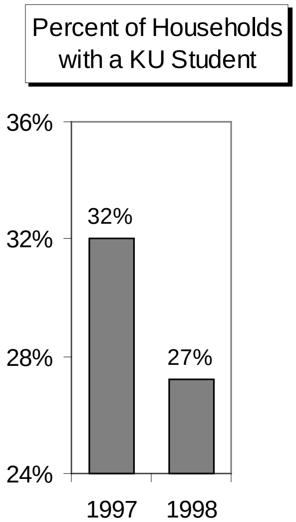
Age Group		Number	Percentage: 1998	1997	1996
18 to 25	years old	364	29.3%	35.5%	36.0%
26 to 40	years old	363	29.2%	28.3%	32.0%
41 to 60	years old	317	25.5%	21.3%	21.7%
Over 60	years old	199	16.0%	15.0%	10.3%
Missing		17	1.4%		

Out of 1260 asked this question, there were 1243 valid responses.

The random sample this year captured more responses from people between forty and sixty years old than last year and fewer responses from people between eighteen and twenty five years old.



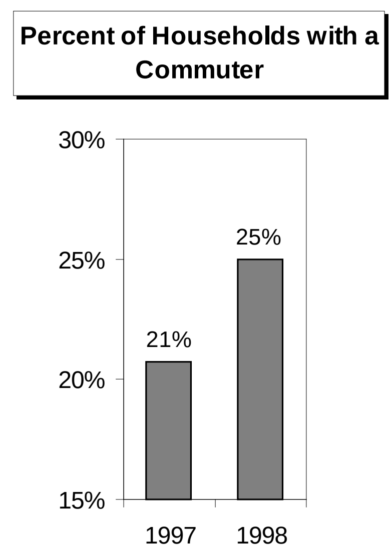
Question 10. *Are any of the principle householders KU student?*



This is an attempt to qualify the responses received by measuring how many of them are due to college student priorities. Of the 1260 asked, 1245 responded to this question. Out of all responses 27 percent (339) represent households with a KU student in a decision-making role. In 1997, when the question was first asked, 32 percent of households reported a KU student in a decision-making role.

The cross-tabulation tables, starting on page 25, will show how these decisions differ from non-student households.

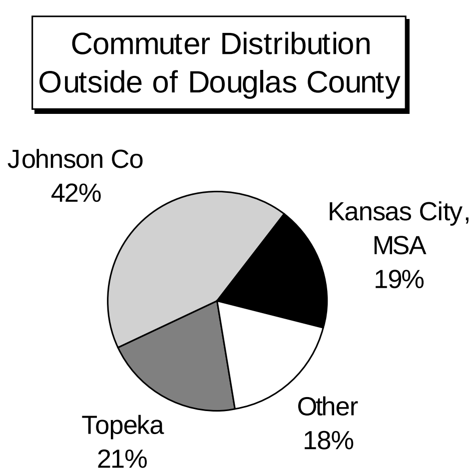
Question 11. *Do any of the principle householders work outside Douglas County?*
If "Yes", *What county do you/they work in?*
And *What type of job do you/they have?*



This question was asked to determine the commuting patterns of Lawrence / Douglas County residents.

In 1998 25 percent of households have at least one person commuting to work outside Douglas County compared to 20.8 percent in 1997.

Fifteen different counties were mentioned this year as commuters' destinations. However, they were grouped based on the proximity to the shopping locations defined in question 3. The results are on the graph. Johnson County was the most popular destination with 42 percent of all commuters, which is up from 40 percent in 1997. Commuting to Topeka was reported by 21 percent of commuters, down considerably from 33.5 percent last year. Commuting to Kansas City increased from 7.2 percent in 1997 to 19 percent in 1998, this increase could be attributed, however, not to the increase of popularity of the Kansas City area but to the different interpretation of city boundaries (this year the entire Kansas City MSA was included). Among the other places Missouri was mentioned by 3.6



percent of all commuters. A complete list of counties mentioned by commuters and mention rates can be found on page 30.

This year information on commuter employment was requested. Answers were combined into the following categories:

	Percent of Commuters
Manufacturing	2.9 %
Mining, Construction	2.9
Transportation, communications, public utilities	6.1
Trade (wholesale, retail)	8.7
Finance, insurance, real estate	4.5
Medical services	7.7
Professional services (accountant, lawyer, etc.)	8.7
Government (federal, state, local)	3.5
Federal military	0.6
Education	13.2
Agriculture	0.6
Retired	0.6
Homemaker	4.2
Student	9.6
Food industry	2.9
Computers/IT	3.9
Self-employed	1.6
General services (waitress, mechanic, etc.)	6.4
Other	10.0
Refused/no answer	1.3

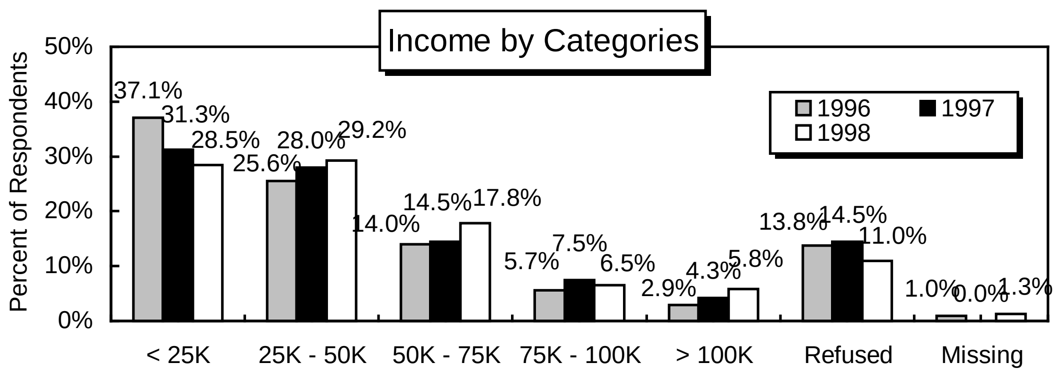
Question 12. *And finally, which best describes your household's annual gross income?*

This question is always placed at the end of the survey because many respondents consider it to be too sensitive to answer. Data from this question are used strictly for cross-tabulation of other data.

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 the cross-tabulations just to see if those respondents would verify or refute the general trends of the others.

This year responses were as follows:

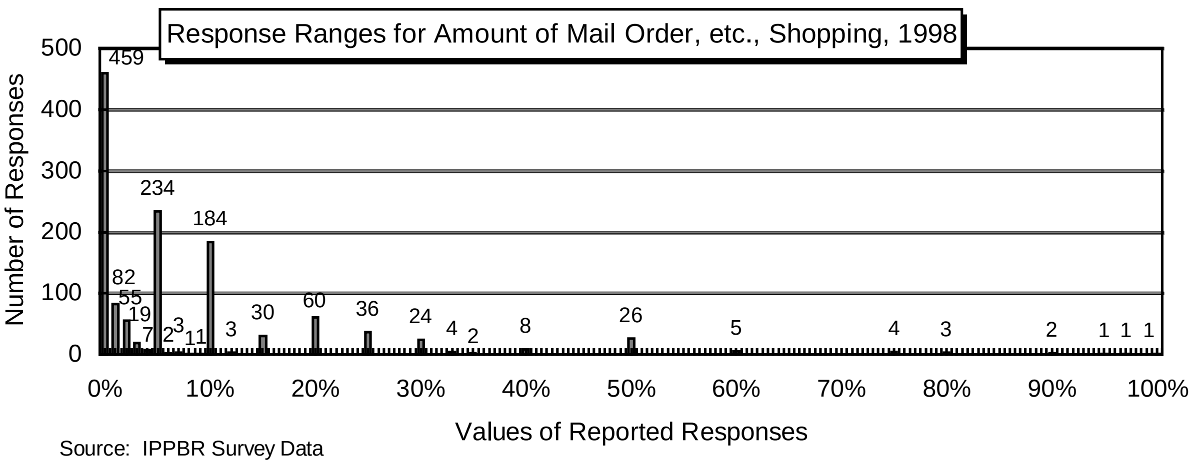
Annual Household Income	Number of Responses	1998	1997	1996
Less than $25,000	359	28.5%	31.3%	37.1%
$25,000 to $49,999	368	29.2%	28.0%	25.6%
$50,000 to $74,999	224	17.8%	14.5%	14.0%
$75,000 to $99,999	82	6.5%	7.5%	5.7%
$100,000 and over	73	5.8%	4.3%	2.9%
Refused to answer	138	11.0%	14.5%	13.8%
Missing	16	1.3%	0.0%	1.0%



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: 459 respondents did none of their shopping using these alternative means, 184 respondents reported that they did 10 percent, and one person said he did 100 percent 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: 223 people said they did NO shopping outside Lawrence and 130 people said they did half of their shopping outside Lawrence. Since there were 1260 respondents in 1998 survey, these numbers account for 17.7 percent and 10.3 percent, respectively. For comparison, in 1996 14.9 percent and in 1997 19 percent did no shopping outside Lawrence; in 1996 15.7 percent and in 1997 11.3 percent did half of their shopping outside of Lawrence.

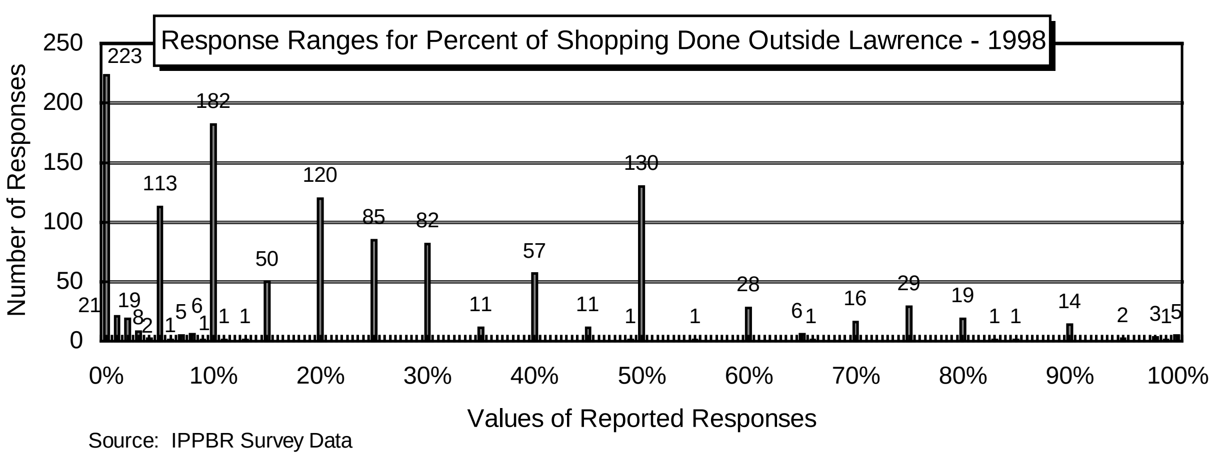


Table 1 - Basic data from question 3.

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	(624) 60%	7.8	11.6%	1040
Population %	49.5%	3.8	5.8%	1260
Johnson County	(873) 84.3%	15.9	22.5%	1035
Population %	69.3%	11.0	15.6%	1260
Kansas City	(436) 42.1%	6.0	8.2%	1035
Population %	34.6%	2.1	2.8%	1260
Other Places	(143) 13.8%	17.4	26.7%	1036
Population %	11.3%	2.0	3.1%	1260

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 400. This provides a percentage applicable to the population as a whole.

Therefore, it is safe to say that, for example, about 70 percent of Lawrence residents intentionally go to the Johnson County area for the purpose of shopping. They go there almost as often as once a month and do about 16 percent of their total shopping in the stores there. This represents an increase in all three measures from last year. (See last year's report for all of the support data from these tables.)

Table 2 - Basic data from question 4a. p. 1 of 2

Complete List of Shopping Destinations Location	Number of times mentioned	Location	Number of times mentioned
103^{rd} and Metcalf	1	Independence Center	8
10^{th} and Great Bend	1	Indian Springs Mall	2
115^{th} and Metcalf	1	Italian Gardens and Boats	1
117^{th} Street	1	Jackson	1
119^{th} and Metcalf	14	JCPenney Outlet Store	2
119^{th} and Nall	1	Johnson Drive	2
119^{th} and Roe	9	Kellogg Ave., Wichita	1
119^{th} Street	22	Lackman Rd.	1
17^{th} Street	1	Lee's Summit	1
21^{st} and Wanamaker	3	Lenexa Area	1
21^{st} Street-Topeka	5	Main Street	1
35^{th} Street	1	Mall In Wichita	1
39^{th} Street	1	Manchester Rd.	1
47^{th} Street	1	Manhattan Town Center Mall	2
49^{th} Street	1	Meadowbrook Mall	1
55^{th} and Wornall	1	Mega Mall	1
63^{rd} and Blackmun	1	Merriam	1
75^{th} Street	6	Metcalf	54
87^{th} Street	3	Metcalf South Mall	41
91^{st} and Metcalf	4	Metro North Mall	9
95^{th} and Metcalf	12	Michigan Ave., Chicago	2
95^{th} and Quivira	24	Mid-America Mall	2
95^{th} Street	18	Mission Mall	6
96^{th} and Quivira	1	Normandy Square	1
97^{th} Street	1	North Brook Court	1
Antioch	2	North Oak, North Kansas City	1
Bannister Mall	18	North Park Mall, Dallas	4
Bartle Hall	1	Northridge	1
Battlefield Mall	1	Oak Brook	2
Benn Ave	1	Oak Park Mall	547
Benton Blvd	1	Oak Ridge Mall, Kansas City	1
Berry Road	1	Oakridge Mall, Topeka	1
Blue Ridge Mall	2	Odessa Mall	1
Bradley Fair	3	Olathe	4
Broadway	2	On Gage and Huntoon	1
Brookside	1	Overland Park	6

p. 2 of 2

Bryar Wood	1	Ozarks	1
Burnsville Mall	1	Ozarks Outlet Mall	1
California Rd.,Topeka	1	Park Meadows	1
Cherry Creek	1	Plaza In Leavenworth	1
Chesterfield Mall	1	Plaza South	1
City Market	2	Prairie Village	1
College Blvd.	1	Promenade	1
Coral Ridge Mall	1	Pyramid Mall	1
Country Club Plaza	7	Quivira	17
County Mall	1	Rock Rd, Wichita	2
Crossroads	1	Santa Fe Trail	1
Crown Center	5	Shannon Valley	1
Downtown Chicago Area	1	Shawnee Mission Parkway	3
Downtown Emporia	1	State Line	3
Downtown Kansas City	1	The Plaza	129
Downtown Topeka	3	Topeka Ave	2
Eagle Mall	1	Topeka Mall	4
East Barrow	1	Town Center, Kansas City	95
East Town	1	Town East In Wichita	10
Fairlawn	4	Town Plaza Center	3
Fairmont	1	Town West In Wichita	2
Flint Hills Mall	1	Trade Shows	1
Foxvalley Mall	1	Valleys	1
Funco Land In Overland Park	1	Wakarusa Drive	4
Galleria, Dallas	3	Wakeegan	1
Gallions	2	Wanamaker Rd., Topeka	52
Gatekeeper	1	Ward Parkway Mall	4
Gateway County Store	1	West Lake Mall	6
Grandview	1	West Topeka	1
Great Bend Mall	2	Westport	14
Great Mall Of The Great Plains	105	Westridge Mall	299
Hawthorne Plaza	1	White Lakes Mall, Topeka	7
Hay Market Square	1	Wichita	1
Hillcrest Center	1	Woodfield Mall	1
Hutchinson	1	Woodland Hills Mall, Tulsa	1
Hutchinson Mall	1	Woodlands Mall	1
Hwy 74- Denver	1	Wornall	1

Source: IPPBR Survey Data

Table 3 - 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	237	23.1%	18.8%
Grocery/ Household Supplies	101	9.8%	8.0%
Appliances/ Home Furnishings	442	43.3%	35.1%
Clothing/Apparel	710	69.3%	56.4%
Automobile Purchases	385	38.4%	30.6%
Automobile Parts and/or Service	171	16.9%	13.6%
Theater/Movies/Concerts	374	36.8	29.7%
Restaurants	512	50.1%	40.6%
Electronics/Computers	524	51.7%	42.6%
Books/Gifts	378	37.1%	30.0%
Sporting Events	367	37.5%	29.1%
Other Reasons	63	16.3	5.0%

Source: IPPBR Survey Data

This table should be read as follows:

> The category of Clothing and Apparel was mentioned by 710 respondents, almost 70 percent 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 almost 56 percent of Lawrence residents find it necessary to shop out-of-town to fulfill their clothing needs. Once again, this is a decrease from both 1997 and 1996.

Table 4 - Basic data from question 6.

Reasons	Number of times mentioned	Percentage of those asked this question	Percentage of the general population
Prices	286	32.8%	22.7%
Quality of Merchandise	83	9.8%	6.6%
Variety of Selection	714	74.6	56.7%
Quality of Service	37	4.5%	2.9%
Change of Pace	109	13.0%	8.7%
Convenient to Job	56	6.7%	4.4%
Other	235	36.4%	18.7%

Source: IPPBR Survey Data

This table should be read as follows:

> In the 1998 survey the reason “Variety of Selection” was mentioned by 714 respondents, representing close to 75 percent of those who were asked this question. Taken to the population as a whole, this calculates out to over half of the residents of Lawrence considering this an important factor in their shopping decisions.

Table 5 - Basic data from question 8.

Sex	Number	Percent of Total
Female	743	59.3%
Male	511	40.7%

Source: IPPBR Survey Data

Table 6 - Basic data from question 9.

Age	Number	Percent of Total
Age 18 - 25 yrs.	364	29.3%
Age 26 - 40 yrs.	363	29.2%
Age 41 - 60 yrs.	317	25.5%
Age > 60 yrs.	199	16.0%

Source: IPPBR Survey Data

Table 7 - Basic data from question 10.

KU Student	Number	Percent of Total
In Household	339	27.2%

Source: IPPBR Survey Data

Table 8 - Basic data from question 11. p.1 of 2

Commute	Number	Percent of Total
Outside Douglas Co.	312	25.0%

Source: IPPBR Survey Data

Commuter Destinations Counties	Number	Percent of Total
Johnson Co.	130	42.6%
Shawnee Co.	63	20.7%
Jackson Co.	21	6.7%
Wyandotte Co.	18	5.9%
Leavenworth Co.	9	2.9%
Clay Co.	7	2.3%
Franklin Co.	7	2.3%
Jefferson Co.	2	0.7%
Cass Co.	1	0.3%
Crawford Co.	1	0.3%
Dickinson Co.	1	0.3%
McPherson Co.	1	0.3%
Miami Co.	1	0.3%
Riley Co.	1	0.3%
Sedgwick Co.	1	0.3%
Other	41	13.4%

p. 2 of 2

Commuter Destinations Commuting Area	Number	Percent of Total
Johnson Co.	130	42.62%
Topeka	63	20.7%
Kansas City	57	18.7%
Other	55	18.0%

Source: IPPBR Survey Data

Table 9 - Basic data from question 12.

Income	Number	Percent of Total
Income < $25K	359	28.5%
$25,000 to $49,999	368	29.2%
$50,000 to 74,999	224	17.8%
$75,000 to $99,999	82	6.5%
Over $100,000	73	5.8%
Refused	138	11.0%
Missing	16	1.3%

Source: IPPBR Survey Data

DATA COMPARISONS

Table 10 - 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
All Respondents	7.8	1257	23.5	1257
Female	7.4	742	23.3	741
Male	8.3	510	23.9	511
Age 18 - 25 yrs.	5.3	363	38.3	364
Age 26 - 40 yrs.	7.7	363	19.3	363
Age 41 - 60 yrs.	9.7	317	18.7	317
Age > 60 yrs.	9.5	198	11.0	198
Income < $25K	5.8	357	28.4	358
$25K - $50K	7.4	368	21.98	368
$50K - $75K	9.7	224	19.4	224
$75K - $100K	8.9	82	21.5	82
Income > $100K	13.5	73	28.0	73
Income $ refused	8.8	138	20.5	138
KU Student - Yes	6.5	338	34.5	339
KU Student - No	8.4	905	19.4	905
Commuter - Yes	6.0	312	28.9	312
Commuter - No	8.5	932	21.2	933
Neither One	8.8	690	17.3	690

Source: IPPBR Survey Data

This table should be read as follows (see top of next page, too):

> For question 1, respondents between the ages of 41 and 60 reported that they did, on average, 9.7 percent of their total shopping by methods that do not involve retail stores, such as mail order, Internet or television, more than any other age category.

For question 2 (previous page), respondents with annual household incomes between $50,000 and $75,000 reported that they did about 19 percent of their shopping outside Lawrence, a figure lower than the 23.5 percent average for all respondents.

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

Topeka	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
All Respondents	7.8	624	11.7	621
Female	7.3	375	11.7	373
Male	8.6	246	11.8	246
Age 18 - 25 yrs.	8.8	147	14.4	147
Age 26 - 40 yrs.	6.9	199	10.5	199
Age 41 - 60 yrs.	8.0	186	10.8	186
Age > 60 yrs.	7.3	85	11.7	84
Income < $25K	8.4	122	14.3	122
$25K - $50K	7.6	197	11.2	197
$50K - $75K	6.6	136	9.9	134
$75K - $100K	9.4	53	11.3	53
Income > $100K	7.4	49	12.1	49
Income $ refused	8.1	62	11.7	62
KU Student - Yes	7.9	125	13.0	125
KU Student - No	7.4	493	11.4	491
Those who Commute to This Area	17.9	47	21.9	47

Source: IPPBR Survey Data

Read this series of tables as follows:

Female respondents made less trips to Topeka than male respondents, 7.3 times/year to 8.6 times/year, for the purpose of shopping, but they both did about the same amount of their total shopping there (11.7 percent and 11.8 percent, respectively).

Table 12 - Cross-tabulation of question 3b (destinations) with demographics.

Johnson County	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
All Respondents	16.0	868	22.5	865
Female	15.8	480	23.0	479
Male	16.5	384	21.9	383
Age 18 - 25 yrs.	20.2	305	31.5	305
Age 26 - 40 yrs.	16.6	266	18.9	266
Age 41 - 60 yrs.	11.6	210	16.6	210
Age > 60 yrs.	9.4	77	15.0	77
Income < $25K	18.5	237	29.5	237
$25K - $50K	15.4	266	21.1	266
$50K - $75K	14.4	154	19.2	153
$75K - $100K	12.9	60	18.0	60
Income > $100K	15.1	63	18.6	63
Income $ refused	16.6	83	21.9	83
KU Student - Yes	19.8	278	30.5	278
KU Student - No	14.2	584	18.7	583
Those who Commute to This Area	27.9	112	32.6	112

Source: IPPBR Survey Data

Table 13 - Cross-tabulation of question 3c (destinations) with demographics.

Kansas City	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
All Respondents	6.1	431	8.4	429
Female	5.9	239	8.6	239
Male	6.4	189	8.1	188
Age 18 - 25 yrs.	7.8	185	11.4	185
Age 26 - 40 yrs.	4.8	120	5.2	120
Age 41 - 60 yrs.	4.9	95	6.4	95
Age > 60 yrs.	5.2	27	8.4	27
Income < $25K	7.9	127	12.3	127
$25K - $50K	5.2	124	7.0	124
$50K - $75K	4.9	66	5.7	65
$75K - $100K	5.0	27	2.3	27
Income > $100K	6.7	46	8.7	46
Income $ refused	5.2	40	5.9	40
KU Student - Yes	6.6	163	9.8	163
KU Student - No	5.8	267	7.4	266
Those Who Commute to This Area	8.3	24	11.5	24

Source: IPPBR Survey Data

Table 14 - Cross-tabulation of question 3d (destinations) with demographics.

Other Places	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
All Respondents	17.7	141	26.2	139
Female	18.7	84	30.4	83
Male	16.3	57	20.1	56
Age 18 - 25 yrs.	22.8	72	30.6	72
Age 26 - 40 yrs.	14.5	26	24.8	25
Age 41 - 60 yrs.	11.5	29	15.9	29
Age > 60 yrs.	11.1	10	19.1	9
Income < $25K	18.8	53	30.1	53
$25K - $50K	24.7	38	27.8	37
$50K - $75K	10.2	18	21.1	17
$75K - $100K	16.9	8	16.9	8
Income > $100K	14.3	10	20.8	10
Income $ refused	6.5	11	16.6	11
KU Student – Yes	21.8	62	29.6	62
KU Student – No	14.7	76	22.6	74

Source: IPPBR Survey Data

It has been hypothesized that some of the “Other Places” shopping is due to KU Students who wait to shop until they are at their parents’ homes.

Table 15 - Cross-tabulation of question 5 with demographics. p. 1 of 4

Goods or Services Sought	Medical	Grocery/ Household	Appliances/ Home Furnishings
All Respondents	237 (23.1%)	101(9.8%)	442 (43.3%)
Female	129(22.1%)	54 (9.3%)	255(43.9%)
Male	107(24.4%)	47 (10.7%)	185(42.5%)
Age 18 - 25 yrs.	105(31.1%)	21(6.2%)	136(37.4%)
Age 26 - 40 yrs.	49 (16.1%)	33(10.8%)	148(59.8%)
Age 41 - 60 yrs.	48 (17.9%)	35(13.1%)	126(47.2%)
Age > 60 yrs.	33(30.3%)	11(10.1%)	31(28.4%)
Income < $25K	89 (32.0%)	21(7.6%)	100(36.5%)
$25K - $50K	60 (19.3%)	23 (7.4%)	127(40.8%)
$50K - $75K	37 (19.2%)	23(7.8%)	92 (47.9%)
$75K - $100K	9 (12.2%)	11(14.9%)	36 (48.6%)
Income > $100K	18(26.5%)	7 (10.3%)	38(47.1%)
Income $ refused	23(23.0%)	15(14.9%)	48 (48.5%)
KU Student - Yes	89 (29.0%)	23(7.5%)	132 (43.7%)
KU Student - No	147(20.5%)	77 (10.8%)	309(43.2%)
Commuter - Yes	76 (26.2%)	39(13.4)	138(47.8%)
Commuter - No	160(21.8%)	61 (8.3%)	303(41.6%)
Neither One	100(19.4%)	48 (9.3%)	214(41.6%)

Source: IPPBR Survey Data

Read this series of tables as follows:

> Out of respondents with household earnings over $100,000 who were asked this question, 38 reported appliances and home furnishings as one of the categories that they shopped for outside Lawrence. This is a “mention rate” of 55.9 percent. 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 15 - Cross-tabulation of question 5 with demographics. p. 2 of 4

Goods or Services Sought	Clothing/ Apparel	Auto Purchase	Auto Parts or Service
All Respondents	710 (69.3%)	385 (38.4)	171(16.9%)
Female	424 (72.7%)	209(36.7%)	86 (14.7%)
Male	283 (64.8%)	176(41.1%)	85 (19.7%)
Age 18 - 25 yrs.	272 (80.7%)	180(54.7%)	96 (28.9%)
Age 26 - 40 yrs.	183(59.8%)	107(35.9%)	47 (15.5%)
Age 41 - 60 yrs.	176(66.2%)	76 (28.9%)	25(9.4%)
Age > 60 yrs.	75 (68.8%)	20(18.7%)	3 (2.8%)
Income < $25K	197(71.1%)	125(46.8%)	67 (24.8%)
$25K - $50K	202(64.2%)	110(36.3%)	44 (14.2%)
$50K - $75K	128(66.3%)	65 (33.9%)	22 (11.4%)
$75K - $100K	54 (73.0%)	27 (37.0%)	4 (5.4%)
Income > $100K	53 (79.1%)	25(37.3%)	16(23.9%)
Income $ refused	75 (74.3%)	32 (32.3%)	18(18.2%)
KU Student - Yes	231(75.2%)	165(55.4%)	86 (28.6%)
KU Student - No	477 (66.8%)	219(31.2%)	85 (12.0%)
Commuter - Yes	203(70.0%)	140(49.5%)	78 (27.0%)
Commuter - No	505 (69.1%)	244(34.0%)	93 (12.8%)
Neither One	344 (66.9%)	136(26.9%)	46(9.0%)

Source: IPPBR Survey Data

Table 15 - Cross-tabulation of question 5 with demographics. p. 3 of 4

Goods or Services Sought	Movies/ Theater/ Concerts	Restaurants	Electronics/ Computers
All Respondents	374 (36.8%)	512 (50.1%)	524 (51.7%)
Female	190(32.9%)	272 (46.8%)	275(47.7%)
Male	184(42.3%)	239 (54.8%)	248(57.4%)
Age 18 - 25 yrs.	171(50.7%)	179(53.3%)	197(58.6%)
Age 26 - 40 yrs.	103(34.1%)	149(49.0%)	163(54.2%)
Age 41 - 60 yrs.	79 (29.8%)	140(52.4%)	138(51.9%)
Age > 60 yrs.	19(17.8%)	41 (37.6%)	24(22.6%)
Income < $25K	135(48.6%)	145(52.2%)	142(52.0%)
$25K - $50K	105(34.4%)	150(48.7%)	147(47.9%)
$50K - $75K	58 (30.4%)	86 (44.8%)	104(54.2%)
$75K - $100K	23 (31.5%)	40 (54.1%)	47 (55.2%)
Income > $100K	21(30.9%)	40 (58.8%)	41(60.3%)
Income $ refused	32 (32.8%)	51 (51.0%)	43 (43.0%)
KU Student - Yes	148(48.4%)	163(53.3%)	188(61.6%)
KU Student - No	226(31.9%)	348 (48.8%)	336 (47.5%)
Commuter - Yes	119(41.5%)	147(51.0%)	177(61.5%)
Commuter - No	255 (35.1%)	365 (49.9%)	347 (47.9%)
Neither One	158(31.0%)	248(48.3%)	188(36.7%)

Source: IPPBR Survey Data

Table 15 - Cross-tabulation of question 5 with demographics. p. 4 of 4

Goods or Services Sought	Books & Gifts	Sporting Events	Other
All Respondents	378 (37.1%)	367 (37.4%)	63 (16.4%)
Female	220(38.1%)	172(31.0%)	28(17.5%)
Male	157(36.0%)	194(46.1%)	34 (15.2%)
Age 18 - 25 yrs.	135(40.3%)	148(44.7%)	14 (11.2%)
Age 26 - 40 yrs.	108 (35.4%)	128(43.8%)	19 (17.9%)
Age 41 - 60 yrs.	98 (36.8%)	78 (37.0%)	22 (20.2%)
Age > 60 yrs.	34(31.8%)	11(11.0%)	7 (16.3%)
Income < $25K	109(39.5%)	103(38.4%)	12 (12.2%)
$25K - $50K	112(36.4%)	116(39.7%)	24 (21.8%)
$50K - $75K	64 (33.3%)	67 (35.8%)	10 (13.0%)
$75K - $100K	25(33.8%)	23(33.8%)	6 (18.2%)
Income > $100K	29(42.6%)	24(35.8%)	3 (13.0%)
Income $ refused	39 (39.4%)	34 (35.1%)	8 (18.6%)
KU Student - Yes	124(40.7%)	126(42.6%)	16 (14.0%)
KU Student - No	254(35.7%)	241(35.4%)	47 (17.4%)
Commuter - Yes	109(38.1%)	116(41.6%)	23 (19.2%)
Commuter - No	269(36.8%)	251(35.9%)	40 (15.2%)
Neither One	188(36.7%)	159(32.6%)	32 (17.1%)

Source: IPPBR Survey Data

Table 16 - Cross-tabulation of question 6 with demographics. p. 1 of 3

Reasons	Price	Quality of Merchandise	Variety of Selection
All Respondents	286 (32.8%)	83 (9.8%)	714 (74.6%)
Female	154(31.2%)	45 (9.4%)	394 (72.7%)
Male	130(34.5%)	38 (10.4%)	315(76.8%)
Age 18 - 25 yrs.	79 (27.6%)	20 (7.2%)	246(76.4%)
Age 26 - 40 yrs.	101(37.8%)	26 (10.2%)	223(78.2%)
Age 41 - 60 yrs.	82 (36.1%)	25 (11.3%)	176(71.0%)
Age > 60 yrs.	24 (27.3%)	11(12.4%)	65 (65.7%)
Income < $25K	650 (27.7%)	17 (7.5%)	190(72.5)
$25K - $50K	97 (36.3%)	34 (13.2%)	215(75.2%)
$50K - $75K	56 (34.8%)	11 (7.1%)	131(74.4%)
$75K - $100K	27 (42.9%)	3 (5.0%)	52 (75.4%)
Income > $100K	11(19.0%)	10(17.5%)	56 (86.2%)
Income $ refused	30 (34.1%)	8 (9.0%)	69 (70.4%)
KU Student - Yes	77 (29.5%)	20 (7.9%)	224(75.7%)
KU Student - No	209(34.3%)	63 (10.7%)	488 (74.1%)
Commuter - Yes	98 (38.6%)	24 (9.8%)	198(73.1%)
Commuter - No	187(30.3%)	58 (9.7%)	514 (75.1%)
Neither One	141(32.4%)	46 (11.0%)	349 (73.5%)

Source: IPPBR Survey Data

Read this pair of tables as follows:

> Out of respondents who mentioned price as a deciding factor in choosing to shop outside Lawrence, it was mentioned most frequently by respondents with household incomes between $75,000 and $100,000 (almost 43 percent).

Table 16 - Cross-tabulation of question 6 with demographics. p. 2 of 3

Reasons	Quality of Service	Change of Pace	Convenient to Job
All Respondents	37 (4.5%)	109(13.0%)	56 (6.7%)
Female	22 (4.7%)	63 (13.3%)	30 (6.4%)
Male	14 (3.9%)	45 (12.5%)	26 (7.3%)
Age 18 - 25 yrs.	8 (2.9%)	29(10.6%)	22 (7.9%)
Age 26 - 40 yrs.	11(4.4%)	23 (9.1%)	20(8.1%)
Age 41 - 60 yrs.	10 (4.7%)	37 (17.2%)	14 (6.4%)
Age > 60 yrs.	7 (8.0%)	19(20.9%)	0 (0.0%)
Income < $25K	8 (3.5%)	19 (8.4%)	16(7.0%)
$25K - $50K	10 (4.0%)	35 (13.9%)	16(6.3%)
$50K - $75K	11(7.2%)	25 (16.0%)	11(7.2%)
$75K - $100K	4 (6.6%)	11(17.7%)	4 (6.7%)
Income > $100K	2 (3.6%)	4 (7.4%)	3 (5.5%)
Income $ refused	2 (2.4%)	15(17.4%)	6 (7.1%)
KU Student - Yes	6 (2.4%)	21(8.3%)	25(9.8%)
KU Student - No	31 (5.4%)	88 (15.1%)	31 (5.4%)
Commuter - Yes	13 (5.4%)	22 (9.1%)	41 (16.8%)
Commuter - No	24 (4.1%)	87 (14.6%)	15 (2.6%)
Neither One	20(4.9%)	72 (17.3%)	7 (1.7%)

Source: IPPBR Survey Data

Table 16 - Cross-tabulation of question 6 with demographics. p. 3 of 3

Reasons	Other
All Respondents	235 (36.4%)
Female	134 (36.1%)
Male	101 (36.9%)
Age 18 - 25 yrs.	84 (38.9%)
Age 26 - 40 yrs.	64 (35.2%)
Age 41 - 60 yrs.	62 (35.4%)
Age > 60 yrs.	24 (34.8%)
Income < $25K	77 (42.3%)
$25K - $50K	68 (35.4%)
$50K - $75K	37 (31.9%)
$75K - $100K	15 (28.8%)
Income > $100K	14 (36.8%)
Income $ refused	24 (37.5%)
KU Student - Yes	78 (23.0%)
KU Student - No	157 (35.1%)
Commuter - Yes	75 (39.7%)
Commuter - No	160 (35.2%)
Neither One	109 (34.4%)

Source: IPPBR Survey Data

Table 17 - Cross-tabulation of question 7 with demographics.

Casino Visits & Commuting	Visited Casino in Past Year	Average # of Visits	Valid Cases
All Respondents	428 (34.3%)	6.2	1248
Female	227 (30.8%)	3.8	737
Male	199 (39.3%)	9.0	506
Age 18 - 25 yrs.	148 (40.8%)	5.9	363
Age 26 - 40 yrs.	126 (34.7%)	8.4	363
Age 41 - 60 yrs.	97 (30.6%)	4.7	317
Age > 60 yrs.	56 (28.1%)	4.9	199
Income < $25K	120 (33.4%)	5.0	359
$25K - $50K	136 (37.0%)	7.4	368
$50K - $75K	82 (36.6%)	6.6	224
$75K - $100K	25 (30.5%)	6.3	82
Income > $100K	26 (35.6%)	5.3	73
Income $ refused	38 (27.7%)	5.3	137
KU Student - Yes	130(38.3%)	7.2	339
KU Student - No	298(32.9%)	5.8	905
Commuter - Yes	129(41.3%)	8.6	312
Commuter - No	298(31.9%)	5.2	933
Neither One	213(30.9%)	5.7	

Source: IPPBR Survey Data

A total of 428 people, out of 1248 who answered this question, reported that they had been to a casino within the last year (34.3 percent). 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:
39.3 percent of male respondents visited a casino at least once in 1998 (vs. 30.8 percent of female respondents). Men also visited a casino more often than women (9 visits and 4 visits to the casino per year on average, respectively).

Table 18 - Cross-tabulation of question 11 with demographics.

Casino Visits & Commuting	Work Outside Douglas Co.	Valid Cases
All Respondents	312(25.0%)	1247
Female	174(23.7%)	735
Male	138(27.2%)	507
Age 18 - 25 yrs.	100(27.5%)	364
Age 26 - 40 yrs.	119(32.8%)	363
Age 41 - 60 yrs.	84 (26.5%)	317
Age > 60 yrs.	7 (3.5%)	198
Income < $25K	55 (15.3%)	359
$25K - $50K	99 (26.9%)	368
$50K - $75K	64 (28.6%)	224
$75K - $100K	34(41.5%)	82
Income > $100K	22(30.1%)	73
Income $ refused	38 (27.5%)	138
KU Student - Yes	97 (28.6%)	339
KU Student - No	215(23.7%)	906

Source: IPPBR Survey Data

In 1998 out of 1247 valid responses 25 percent (312) of respondents have at least one member of their household commuting to work outside Douglas County. This cross-tabulation compares the numbers within each demographic category that reported commuters with the total number of respondents within that category.

Read the table as follows:

Respondents with total household income between $75,000 and $100,000 are almost twice more likely to commute to work than respondents with a total household income below $25,000. It does not mean, however, that income of the respondents is directly proportional to the commuting because the data do not determine what part of the total household income is earned by the commuter.

RECOMMENDATIONS FOR FUTURE SURVEYS

This survey should be conducted again between Thanksgiving and Christmas of each year. The hope is that any impact on the Lawrence community by new retail choices will be clear when compared against the data from previous surveys. It may also clarify the trends and how they change from year to year. It would be especially useful to gather data in any year when a retail store of significant size, or several of smaller size, open within Lawrence. If done regularly, these reports may be able to identify a correlation between store openings and changes in retail shopping habits.

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, it will provide hard data to be used in identifying trends in the retail universe. Only by continuing to conduct this survey periodically will the trend, if there is one, become apparent.

This year, being the third time the survey was conducted, there are indications that the changes in the retail market within Lawrence might have positively affected the shopping behavior of the city residents. The average amount of shopping outside Lawrence decreased in the past three years. The number of those who did a small portion of their total shopping outside the city increased; however the number of people who did a significant amount of shopping outside Lawrence decreased. Among those who go shopping out of town the most popular destinations were the Johnson County, Oak Park Mall and Dillard’s. Clothing/apparel is the item most often sought and variety of selection is the most common reason for shopping at the distant locations. However as more new stores open or already existing stores expand within Lawrence both above categories are mentioned less and less often. Casinos are visited by one in every three respondents. This year the number seem to be slightly higher but it is most likely due to the more broad range of the question that included all casinos in Kansas rather than just the Kansas City area. One in every four households in Lawrence has at least one person commuting to work outside Douglas County. The most popular commuter destination was Johnson County, followed by Shawnee County (Topeka).

Information from hard data is always better than from rumors or speculation, when it can be obtained. These data will benefit all interested in the economic development of Douglas County.