

Downtown Lincoln Employee Retail Survey Summary

(prepared by Progressive Urban Management Associates, Inc. April 2007)

As part of the Downtown Lincoln Retail Retention and Recruitment Strategy process, an electronic survey instrument was distributed by four major downtown employers to all of their downtown employees. 2,136 surveys were completed and returned.

Profile of respondents.

- Survey respondents were mostly female (71%).
- 62% of respondents have worked in downtown for six years or more.
- 98% of respondents work east of the Haymarket District.
- 39% of respondents were age 50 to 69, 33% of respondents were age 35 to 49, and 22% were age 25 to 34.
- 45% of respondents reside in zip codes that are located southeast, and 27% reside in zip codes located northeast of downtown Lincoln.
- 60% of respondent households have annual incomes less than \$50,000, and 34% have incomes between \$50,000 and \$99,999.

A summary of the survey results follows:

During the workday, approximately how often do you shop/spend in downtown Lincoln?

More than half of respondents (58%) shop or spend in downtown at least once a week.

| | All Respondents |
|-------------------------------|-----------------|
| Daily | 17% |
| Several times each week | 21% |
| About once a week | 20% |
| Two or three times each month | 16% |
| Less than once each month | 18% |
| Never | 8% |
| Total | 100% |

Which of the following items do you buy in downtown Lincoln? Almost all of the survey respondents (91%) indicate that they buy food and beverages downtown. Convenience items were the second most popular category. "Other" responses included greeting cards, movies and entertainment, banking, photo processing, banking, auto parts/service, flowers and hardware.

| Shopping items | All respondents |
|---|-----------------|
| Food and beverages | 91% |
| Convenience items | 52% |
| Cosmetics/grooming supplies | 32% |
| Gifts | 32% |
| Pharmacy prescriptions | 27% |
| Music and books | 24% |
| Basic household supplies | 21% |
| Personal services (salon/barber, laundry) | 18% |
| Clothing and accessories | 12% |
| Jewelry | 11% |
| Art | 6% |
| Home furnishings and accessories | 4% |
| Other | 11% |

In the Lincoln area, which are your favorite and most frequented stores to buy the following items? Respondents were asked to list one or two of their favorite stores in the Lincoln area by category. WalMart and Target were mentioned as a favorite in several categories, including home furnishings and accessories, toys and children’s wear and basic household supplies. Respondents are inclined to shop at downtown businesses for cosmetics and grooming supplies, jewelry and art. *Of note, 16% of respondents who purchase jewelry and 12% of respondents who purchase art, do so from a variety of downtown galleries and shops.*

| Shopping items | Store | Percent of Respondents |
|--|--|-------------------------------|
| Business clothing and accessories | Dillard’s/J.C. Penney | 48% |
| Casual clothing and accessories | Kohl’s | 48% |
| Sports and recreational clothing/goods | Scheels | 43% |
| Shoes | Famous Footwear/Footloose & Fancy/Payless Shoe Store | 39% |
| Cosmetics/grooming supplies | Walgreen’s | 61% |
| Home furnishings and accessories | Shopko/Wal-Mart | 37% |
| Music and books | Barnes & Noble | 59% |
| Jewelry | Downtown shops/Kohl’s | 29% |
| Art | Downtown galleries and shops/Gordman’s | 18% |
| Fresh foods/grocery | HyVee/Super Saver | 80% |
| Toys and children’s wear | Target/WalMart | 51% |
| Basic household supplies | WalMart/Target | 67% |

Of the stores you listed in the preceding question, which five stores would you most frequently visit if these stores were located in downtown Lincoln? Target was the favorite answer to this question with 12% of respondents. Respondents also cite Barnes & Noble bookstore, and other discount and mid-priced department stores and grocery stores as desirable additions to downtown.

| Top Five Stores In Downtown | All Respondents |
|------------------------------------|------------------------|
| Target | 12% |
| WalMart | 8% |
| Shopko | 5% |
| Barnes & Noble | 5% |
| JC Penney | 5% |
| Kohl’s | 5% |
| Dillard’s | 4% |

Do you occasionally leave Lincoln to shop in other cities? 69% of respondents to this question leave Lincoln to shop in other cities. 87% shop in Omaha, and 12% shop in Kansas City. Chicago, Denver, and other towns in the area draw shoppers. Stores frequented in other cities include Nebraska Furniture Mart (28%), malls and outlet malls (12%), Target/Super Target (8%), Whole Foods Market/Wild Oats Grocery (7%), Lowe’s (7%) and Cabela’s (6%).

| Cities outside of Lincoln where you occasionally shop | Percent of respondents who shop outside of Lincoln |
|--|---|
| Omaha | 87% |
| Kansas City, Missouri | 12% |
| Chicago | 4% |
| Denver | 4% |
| Ceresco | 4% |
| Grand Island | 3% |

On nights and weekends, how often do stay or come downtown for the following activities?

62% of respondents dine in downtown and 44% of respondents take advantage of downtown entertainment at least once a month. Respondents are somewhat inclined to shop in downtown, with 40% reporting that they shop in downtown at least once per month. 31% “never” shop in downtown. More than 85% of respondents report coming downtown for sporting events and cultural events “a few times each year” or “never”.

| | More than once a week | About once a week | About once a month | A few times each year | Never | Total |
|-----------------|------------------------------|--------------------------|---------------------------|------------------------------|--------------|--------------|
| Dining | 18% | 20% | 24% | 29% | 9% | 100% |
| Shopping | 6% | 15% | 19% | 29% | 31% | 100% |
| Entertainment | 4% | 13% | 27% | 44% | 12% | 100% |
| Sporting events | 1% | 3% | 10% | 48% | 39% | 100% |
| Cultural events | 1% | 2% | 10% | 57% | 29% | 100% |

If you could add one or two restaurants to Downtown, which restaurant names or types would you add?

Of the 139 responses to this question, quick service sandwich/bakery and fast food concepts were the top choices – respondents indicated a need to remain within lunch timeframes. Respondents also mentioned unique, non-chain concepts, i.e. Eastern European and vegetarian/health food restaurant types as desirable additions to downtown. A variety of chain concepts for Mexican, barbecue, Italian, and steakhouse restaurants and national restaurants featuring casual and/or family dining concepts were also suggested. Several respondents indicated that downtown already has plenty of dining options.

The top ten restaurants/categories by frequency are listed below:

- Fast food (Burger King, McDonalds, Popeye’s) – (30)
- Sandwich/bakery (Panera, Braeda) – (25)
- Mexican - (16)
- Barbecue - (13)
- Chinese - (12)
- Italian - (12)
- Olive Garden - (11)
- Steakhouse - (7)
- Eastern European - (6)
- P.F. Chang - (6)
- Ruby Tuesday’s - (6)
- Vegetarian/health food – (5)
- Applebee’s (5)
- Cheesecake Factory – (5)
- Good selection already in downtown – (5)
- Independent, local ownership - (3)

Which of the following improvements would encourage you to shop more frequently in downtown Lincoln? Respondents were given several options for downtown improvements and asked to rate the importance of the improvement on a scale of 1-5, with 1 being very important and 5 being not important. Making parking easier and less costly and filling empty storefronts were the most important improvements, followed by improved selection/brands in stores, increased store hours of operation, grouping stores closer together, and providing more information on existing stores. Respondents were also concerned with reducing panhandling and vagrancy, improved customer service in stores, and improved lighting on streets. Respondents ranked an expanded bus and shuttle service as least important.

Average rating (0=Not important, 100=Very important)

| Improvements that would encourage more frequent visitation | All Respondents |
|---|------------------------|
| Make parking easier and less costly | 88 |
| Fill empty storefronts and make it more attractive | 79 |
| Increase hours of operation in stores | 72 |
| Improve selection/brands in stores | 71 |
| Provide more information on existing stores | 70 |
| Group stores closer together | 70 |
| Reduce panhandling and vagrants on streets | 69 |
| Improve customer service in stores | 67 |
| Improve lighting on streets | 62 |
| Expand bus and shuttle service | 49 |

If you could change or add one thing to improve downtown, what would it be?

The top two improvements include more accessible and inexpensive parking and fewer bars in downtown. Respondents also want more retail to fill the empty storefronts, removal of the bike lanes, a department store and a more attractive downtown.

The Star Shuttle. When asked how often they use the Star Shuttle to get around Downtown, 94% of respondents indicated that they never use the service. 62% of respondents indicated that no improvement to the service would encourage them to use the Star Shuttle more often, and 19% of respondents suggested that they would use it more often if the shuttle ran with greater frequency.

Survey Cross Tabulations

Respondents by “age of respondent”.

- Respondent cohorts age 18 to 24 (30%) and 25 to 34 (29%) are more likely than other age cohorts to shop or spend in downtown Lincoln “several times a week”, particularly for dining and entertainment.
- The above age cohorts are more likely to spend on clothing and accessories in downtown than other respondents
- 66% of age 25 to 34 year olds purchase convenience items in downtown compared to 56% of all respondents.
- Dining and entertainment are the downtown attractions that appeal to all age demographics.

Respondents by “annual household income”.

- Respondents from households with higher annual incomes are more inclined to leave Lincoln to shop in other cities.
- Respondents from households with annual incomes of \$100,000 or more indicated that they stay or come downtown once a week to dine.
- Respondents from those higher income households are more likely to come downtown “a few times each year” for sporting and cultural events.