Lincoln Young Professional 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 to the more than 400 members of the Lincoln Chamber of Commerce Young Professionals Group. 218 surveys were completed and returned.

Profile of respondents.

- Survey respondents were mostly female (63%)
- 37% of respondents work downtown, 63% work outside of downtown
- The majority of respondents (54%) were age 25 to 34, and 25% of respondents were age 35 to 49.
- 60% of respondents reside in zip codes that are located southeast of downtown Lincoln.
- Over half of respondents (55%) have lived in Lincoln for more than ten years.
- 63% of respondents live in two-adult households, and 66% have no children under age 18 in the household.
- 23% of respondent households have annual incomes of $100,000 or more. Respondents' household incomes were spread fairly evenly at an average of 25% each between the income groups of ($25,000-$49,999, $50,000-$74,999, and $75,000-$99,999).

A summary of the survey results follows:

Which of the following area business districts do you visit *at least* once a month (for non-supermarket shopping)? The Southpointe Pavilions and Westfield Shoppingtown Gateway mall areas were all respondents' first and second choices followed by Downtown Lincoln. 61% of respondents who work downtown spend in downtown at least once per month. Downtown workers tend to shop via the internet and catalogs, in other cities, in the North 27th Street area and Van Dorn Plaza with greater frequency than non-downtown workers. Of the 18 "Other" responses, the Highway 2 corridor between South 56th and 84th Streets was most frequently mentioned.

Business Districts Visited	Works Downtown	Does not work Downtown	All Respondents
Southpointe Pavilions area	66%	76%	72%
Westfield Shoppingtown Gateway area	54%	60%	59%
Downtown Lincoln	61%	29%	43%
Internet/catalog	45%	31%	36%
Omaha	30%	25%	28%
North 27th Street area	30%	25%	26%
Van Dorn Plaza	16%	9%	11%
Kansas City	1%	3%	3%
Other	10%	9%	8%

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. Target was mentioned as a favorite in several categories, including casual clothing and accessories, cosmetics and grooming supplies, home furnishings and accessories, art, toys and children's wear and basic household supplies. Respondents are inclined to shop at downtown businesses for jewelry (22%). *Of note, 22% of respondents who purchase jewelry and 8% 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/Von Maur	39%
Casual clothing and accessories	Gap/Target	36%
Sports and recreational clothing/goods	Scheel's	64%
Shoes	Dillards/Von Maur/Famous Footwear	71%
Cosmetics/grooming supplies	Target	39%
Home furnishings and accessories	Target	36%
Music and books	Barnes & Noble	60%
Jewelry	Sartor Hamann Jewelers/other Downtown shops	22%
Art	Target/Downtown galleries	18%
Fresh foods/grocery	HyVee	52%
Toys and children's wear	Target	41%
Basic household supplies	Target	61%

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 14% of respondents. Respondents also cite Barnes & Noble bookstore, Scheel's sporting goods store, Hy Vee grocery store, Von Maur department store and specialty retailers (Gap, Express) as desirable additions to downtown.

Top Five Stores In Downtown	All Respondents
Target	14%
Barnes & Noble	9%
Scheel's	6%
Hy Vee	5%
Von Maur	5%
Gap	5%
Express	4%

Generally speaking, do you do more shopping during the week (Monday to Friday) or on weekends? Most respondents (66%) shop during the weekends. 63% of Downtown workers do most of their shopping during the weekends.

	All Respondents
Mostly during the weekends	66%
Mostly during the week	34%
Total	100%

How often do you stay or come downtown for the following activities? 74% of all respondents dine in downtown and 67% of all respondents take advantage of downtown entertainment at least once a month. All respondents are less inclined to come downtown for shopping, with 41% reporting that they come downtown to shop "a few times each year" and 31% "never" come downtown to shop. Sporting events draw respondents to downtown with slightly greater frequency than cultural events.

An examination of the differences between downtown workers and non-downtown workers reveals that downtown workers come or stay downtown at least once a month for dining (89%), shopping (52%), entertainment (77%), and cultural events (35%). Respondents that do not work downtown come downtown at least once a month for the same activities with less frequency. 14% of this group comes downtown for shopping and 17% come downtown for cultural events. Low frequency of attendance at sporting events is similar for both groups. More than half of respondents report coming downtown for sporting events "a few times each year" or "never".

How often do you stay or come downtown for the following activities?		Works Downtown	Does not work Downtown	All Respondents
Dining	More than once a week	37%	14%	22%
	About once a week	26%	23%	24%
	About once a month	26%	29%	28%
	A few times each year	9%	34%	25%
	Never	1%	0%	1%
	Total	100%	100%	100%
Shopping	More than once a week	6%	1%	3%
	About once a week	18%	4%	9%
	About once a month	28%	9%	16%
	A few times each year	35%	44%	41%
	Never	13%	42%	31%
	Total	100%	100%	100%
Entertainment	More than once a week	12%	12%	12%
	About once a week	34%	19%	25%
	About once a month	31%	30%	30%
	A few times each year	19%	34%	28%
	Never	4%	5%	5%
	Total	100%	100%	100%
Sporting events	More than once a week	4%	2%	3%
	About once a week	6%	6%	6%
	About once a month	24%	23%	23%
	A few times each year	50%	55%	53%
	Never	16%	15%	15%
	Total	100%	100%	100%
Cultural events	More than once a week	3%	1%	2%
	About once a week	13%	0%	5%
	About once a month	19%	16%	17%
	A few times each year	49%	55%	53%
	Never	15%	28%	23%
	Total	100%	100%	100%

If you could add one or two restaurants to Downtown, which restaurant names or types would you add? Of the 260 responses to this question, local, independently-owned restaurants were the top choice with 30 responses – Venue was mentioned regularly as an example. PF Chang, the Cheesecake Factory, Italian, fine dining concepts, steakhouse, sushi, Chinese and national restaurants featuring casual and/or family dining concepts were also mentioned. Several respondents mentioned that downtown already has plenty of dining options.

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

- Local/independently-owned, non-chain such as Venue (30)
- PF Chang (27)
- Cheesecake Factory (24)
- Italian (11)
- Fine dining (10)
- Steakhouse (9)
- Sushi (8)
- Chinese (6)
- Olive Garden (6)
- Famous Dave's (6)
- Macaroni Grill (5)
- Cheeseburger in Paradise (5)
- Bennigans (4)
- Panera Bread (4)

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. Parking availability and cost was the most important improvement, followed by filling empty storefronts, improving selections/brands in stores, grouping stores closer together, increasing store hours of operation, providing more information on what exists, and better customer service. 17% of all respondents felt that reducing panhandling and vagrancy was a "very important" issue. Respondents generally rated improved lighting on downtown streets and expanding the bus and shuttle service as less important than the other factors.

Respondents that do not work downtown tended to feel more strongly about most improvements, with the exception of filling empty storefronts and enhanced selection/brands in stores. Common themes for "Other" improvements included more up-to-date stores and fewer bars in downtown.

	Average rating (0=Not important, 100=Very important)		
Improvements that would encourage more frequent visitation	**Work Downtown**	**Does not work Downtown**	**All Respondents**
Make parking easier and less costly	80	94	89
Fill empty storefronts and make it more attractive	82	80	81
Improve selection/brands in stores	82	79	80
Group stores closer together	74	77	76
Increase hours of operation in stores	73	75	74
Provide more information on existing stores	69	75	73
Improve customer service in stores	61	68	66
Reduce panhandling and vagrants on streets	55	58	57
Improve lighting on streets	48	56	53
Expand bus and shuttle service	35	36	35

If you could change or add one thing to improve downtown, what would it be? This open-ended question received 141 responses. The top two improvements include more accessible and inexpensive parking, and more, "up-to-date" quality retail with a better selection, including price points. Respondents want more attractive storefronts and a visually appealing shopping area (streetscaping). A downtown pedestrian mall, ease of vehicular and pedestrian access to and within downtown and more post-college age nightlife and entertainment options were other common themes.

Survey Cross Tabulations

Respondents by "age of respondent". It should be noted that the Lincoln Chamber of Commerce distributed electronic surveys to their Young Professionals Group, which is a group of over 400 persons under the age of 40, most of whom do not work or live in downtown Lincoln. Respondents age 25 to 34 (54%) and age 35 to 49 (25%) make up the largest age cohorts for this survey. This leads to many similarities in the cross tabulations to the overall or "all respondents" responses earlier in this summary.

- Younger respondents (age 18 to 24) shop in downtown with the same amount of frequency as the other respondent age groups.
- Dining and entertainment are the downtown attractions that appeal to all age demographics.
- 52% of households in the age 25 to 34 cohort and 64% of households in the age 35 to 49 cohort have annual incomes of $75,000 or more.

Respondents by "annual household income". Respondent households that are younger, and in lower income brackets seem to be more disposed to spend time and money in downtown Lincoln.

- 67% of households with annual incomes of $25,000 or less visit downtown on at least a monthly basis. Overall respondent visitation to downtown at least once a month is 42%.
- 100% of respondents from this group visit downtown at least once a month seeking entertainment, and 99% come downtown at least once a month to dine.
- 64% of households with annual incomes of $150,000 or more come downtown more than once a week to dine compared to 47% of all respondents.