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

Retail Preferences Survey
Report #2

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:
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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 second year this study has been conducted. The previous report was released in October 1997 and is available for purchase through KU-IPPBR as Research Paper #240.

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HIGHLIGHTS

- ➔ Most of the indicators measured by this survey indicate that there could be a trend, although not a statistically significant one, toward a reduction in the amount of shopping that Lawrence residents do outside Lawrence.

- ➔ Approximately 33 percent of the shopping dollars spent by the residents of Lawrence go outside the city, down from 34.5 percent last year (not 28 percent as previously reported, see text of report).

- ➔ 81 percent of those surveyed do some of their shopping outside Lawrence, compared to 85 percent reported in the last survey.

- ➔ Johnson County was the most popular destination once again, with 66 percent of all respondents reporting it as a place they visit, accounting for 13 percent of their shopping total on average, and going there an average of 10 times per year. In last year's report, these numbers totaled 74 percent, 19 percent and 13 times, respectively.

- ➔ Oak Park Mall was the single most popular destination reported, with almost 42 percent (vs. 50 percent last year) of all respondents reporting it by name as a favorite shopping destination. This figure could be higher, since some people reported street locations or general areas instead of names.

- ➔ The store still most frequently mentioned is Dillard's, named by 22 percent of all respondents, although this is down slightly from 26 percent last year.

- ➔ Clothing/apparel is the category of merchandise or service most frequently mentioned, with a response rate corresponding to 61 percent (vs. 67 percent last year) of the Lawrence population.

- ➔ Variety of selection is once again the most frequently mentioned reason for shopping outside Lawrence, with a report rate representing 55 percent of all the general population. This figure was 64 percent last year.

- ➔ The Kansas City area casinos have attracted 132 people out of the 400 respondents during the past year, representing 33 percent of the population, up from the 30 percent reported last year. On average, those who go to the casinos did so just over 4 times within this past year.

- ➔ The newly-surveyed breakout of households with KU students or commuters who work outside Douglas County does, in fact, seem to show that average responses for many goods and services sought and reasons for shopping elsewhere are higher for these categories. Conversely, those households with neither KU students nor commuters have response rates that are lower than the average for all respondents. It is not true in all cases, but in a majority of them.

➔ Out of all households surveyed, 20.8 percent have at least one person commuting to work outside Douglas County.

➔ Out of nine different counties mentioned as commuters' destination, most frequently named were Johnson County with 39.8 percent and Shawnee County (Topeka) with 32.5 percent.

➔ Cross-tabulation between income level and commuting patterns showed that among those with income below $25K only 9.6 percent were commuters, while among those in $75K-$100K and above $100K income brackets 30 percent and 41.2 percent, respectively, commuted to work outside Douglas County.

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 second 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 1997.

DISCUSSION

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.

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. Although these data will be highlighted in this report, they will be combined with data gathered from Lawrence companies in a later Commuting Patterns report.

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. Responses numbered 400, 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%. 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 25.

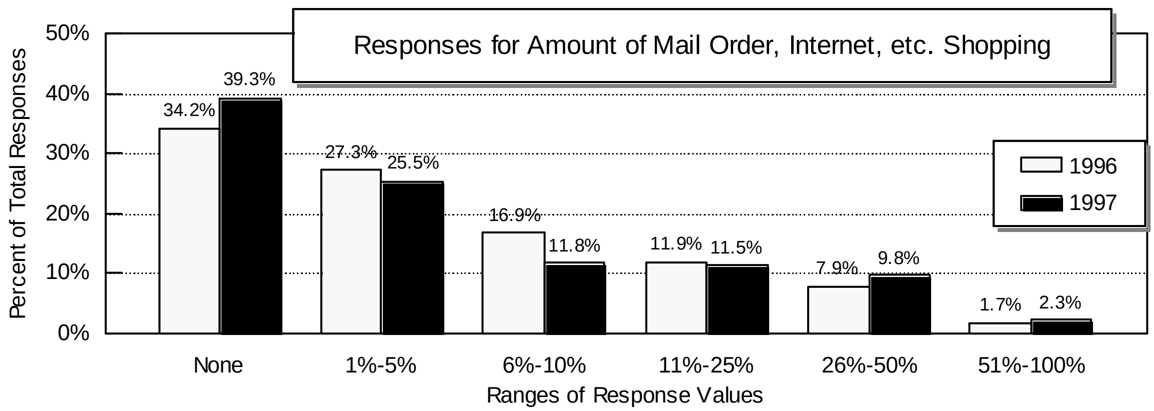
GENERAL RESULTS

The data samples taken at Christmas 1996 and 1997 do not show statistically significant differences when compared within the SPSS software. This means that the differing figures could just as easily be due to random chance as any change in shopping preferences. However, since a large majority of the figures changed in a downward direction, meaning less shopping outside Lawrence and fewer responses indicating strong preferences for various locations, goods or services sought or reasons for leaving Lawrence, it is not unreasonable to infer a slight shift in the trend. Conducting this survey for a third time would resolve the issue.

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 presence in any particular community. Among these are mail order catalogs, shopping channels on television, and Internet shopping services.
Of the 400 valid responses, 243 (60.8 percent) reported using this alternative means of shopping to some degree. Although this figure is lower than the 65.8 percent that reported using these means last year, as shown by the increase in the bar labeled "None" in the graph below, the average amount of shopping that is done via mail order or catalog service, television shopping channel, or the Internet increased from 9.7 percent to 10.2 percent.



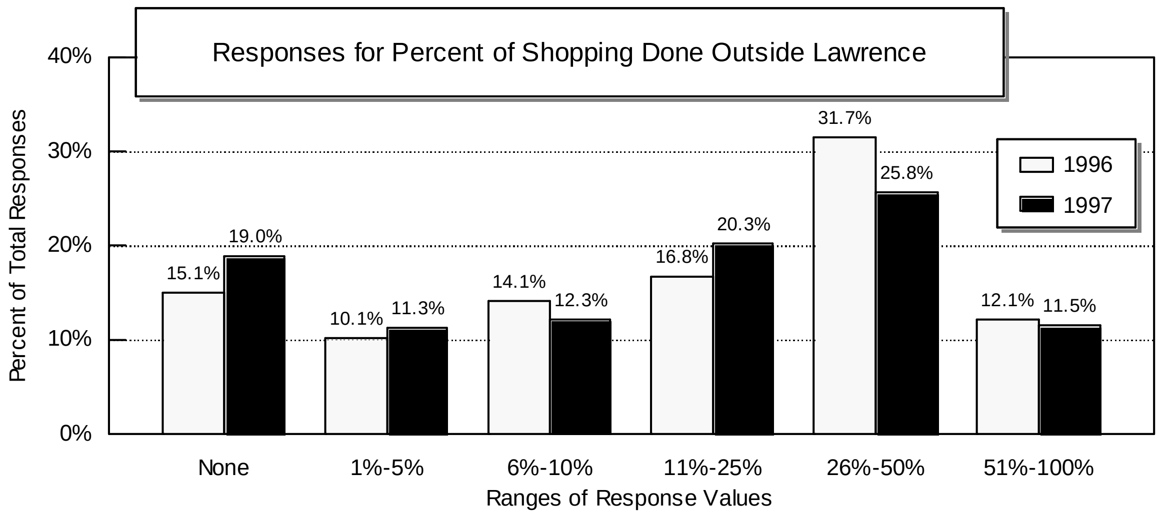
We also see in the graph above that 39 percent of all respondents do not shop this way, while the bulk of those who do gave responses that are at the lower end of the scale and that are lower than the sample from last year. The relatively few who do a great portion of their shopping this way have increased their activity, pushing the average up. A detailed graph of the distribution of these responses is shown on page 20.

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 you do 10 percent of your 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.

Of the 400 people who responded to this question, 324 reported doing some of their shopping outside the City of Lawrence: a rate of 81 percent, a bit lower than the 85 percent recorded last year. On average, 25.3 percent of their shopping is done outside Lawrence, a slight reduction from the 27.6 percent of last year. The wide range of the distribution of responses to this question yields the following graph. As you can see, there is no clear-cut direction to the changes;

categories show slight changes in either direction at high and low ranges of shopping percentages. A more detailed graph of the distribution of responses appears on page 20.
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.

CORRECTION

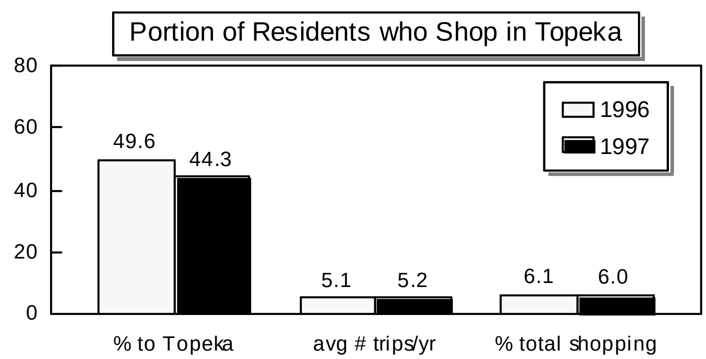
In last year's report, the amount of shopping dollars leaving Lawrence was reported in the highlights section as 28 percent, rounded up from 27.6 percent. This was a measure of the shopping done at remote retail locations and failed to take into consideration the 9.7 percent that went to the non-retail options examined in Question 1 of the survey. Combining these two figures properly yields a total outflow of 34.6 percent of shopping dollars. In comparison, the two figures for this year's report, 25.3 percent and 10.2 percent respectively, yields a total outflow of 32.9 percent. Please remember, though, that these percentages are based on estimates reported during a telephone survey and are not empirically verifiable.

Question 3

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

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 results of this question indicate that 44 percent of all residents do some of their shopping in Topeka, with each person making an average of 5.2 trips per year, which accounts for a total of 6 percent of their shopping.

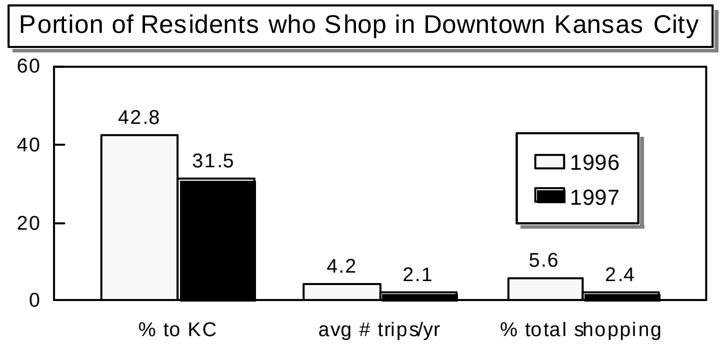
The graph shows that this percentage represents a slight decline from the near 50 percent who reported this last year, a little or no change in the number of trips, and that the percentage of total shopping remained about the same, at 6 percent.

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?

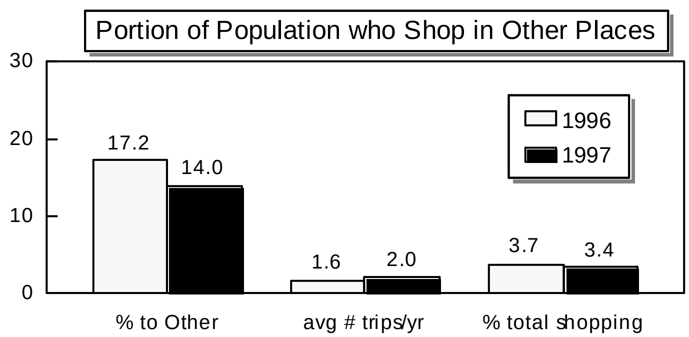
Johnson County and suburban Kansas City, once again, attracted the largest share of shoppers, with almost 66 percent reporting going there to shop. They averaged just under 10 trips per year and did over 13 percent of all their shopping there. As can be seen in the graph, all three of these categories are lower than the figures recorded last year.

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?

This question was rephrased this year to better define the urban shopping districts. The percentage of shoppers who go to these urban areas to shop showed the greatest decline, from 43 percent last year to 31.5 percent this year. The average number of trips (2.1) and the percentage of total shopping (2.4 percent) also showed substantial decline.



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?

In general, 14 percent of Lawrence residents go to places other than those already mentioned for the purpose of shopping. On average, 2 trips per year are made and 3 percent of total shopping is done in those places.

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

KS, Wichita	14
Chicago	5
California	4
Colorado	4
KS, Leavenworth area	4
MO, St. Louis	4
Texas	3
KS, Hutchinson	2
Nebraska	2
Oklahoma	2
Arkansas	1
Caribbean	1
Michigan	1
England	1
Iowa	1
KS, Atchison	1
KS, Eudora	1
KS, Junction City	1
KS, Newton	1
KS, Ottawa	1
KS, Salina	1
KS, western side	1
Minnesota	1
MO, Columbia	1
MO, Lake of the Ozarks	1

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. For example, one respondent reported doing no shopping in Lawrence, but traveling to the Caribbean nine times a year to do all of his/her shopping. It is difficult to rationalize traveling some of these distances merely to visit a favorite store, although it is not impossible. A more probable story might be that shopping was not the primary purpose of the trip. 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. My personal lack of familiarity with some of these sites prevents me from combining them in a more meaningful manner. Therefore, the reader needs to review the entire list, which is not sorted by size this time, to see if a different location reference is also included. It is also a consideration that by not combining the specific locations, those familiar with them might have better insight to the draw of those locations.

Location	Mentioned by	Location	Mentioned by
119th & Metcalf	2	Metcalf South	2
119th & Nall	3	Metro North	2
119th & Roe	3	Mission Mall	4
119th Street	6	Morrow	1
17th & Wannamaker	1	Murdock Street	1
40th & Main	1	New Town Center	1
47th Street	1	Oak Park Mall	136
95th & Metcalf	4	Oakbrook	2
95th & Quivira	2	Olathe	1
95th & Roe	1	Overland Park	5
All KC Malls	1	Plaza	22
All the Malls	2	Quivira	3
Bannister Mall	8	Ridge Road	1
Bradley Fair	1	Rock Road	1
Brush Creek	1	Salina Mall	1
Coconut Plaza	1	Topeka	2
Columbia Mall	1	Topeka Mall	2
Crown Center	2	Town Center	7
Delaware Street	1	Town Center Plaza	2
Downtown KC	2	Town Center Square	1
Fox Valley	1	Town East	1
Ft. Collins Mall	1	Town West	2
Great Mall of the Great Plains	14	Wannamaker	10
Hawthorne Plaza	1	Ward Parkway	3
Independence Center	3	West Link Mall	1
Landing Mall	1	West Ridge Mall	64
Lenexa	1	West Topeka	1
Lenexa Place	1	West Lake	1
Malls in Topeka	2	Westport	1
Metcalf	12	Wornall Road	1
Metcalf Malls	1		

Oak Park Mall was still the most popular destination, mentioned by name by 136 respondents and possibly by location by ten more (see 95^{th} & Quivira, Quivira and Overland Park).

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. As was the case last year, stores that already exist in Lawrence were occasionally mentioned. For example, with Penney's and the Gap, it might be assumed they are signaling their preference for the distant stores rather than just mentioning the local ones, although, since Super Target, Dillon's, HyVee, Amoco, Beauty Warehouse and Priscilla's were also mentioned (once each, twice for Dillon's), it might be assumed that the parameters of the question were misunderstood. All stores that were mentioned have been listed with their respective counts.

Once again, the significance of specific stores is best left to the reader. However, the fact that clothing stores take up the top four positions is a really strong indicator of consumer desires.

Dillard's	70
Jones' Store	48
Gap	22
Penney's	22
Sam's Club	22
Best Buy	20
Sears	20
Eddie Bauer	15
Banana Republic	14
Old Navy	13
Abercrombie & Fitch	11
Toys R Us	9
Express	7
Barnes and Noble	5
Gaylons Sports	6
HyperMart	5
Kohl's	5
Wal-Mart	5
Bath and Body Shop	4
Body Shop	4
Border's Books	4
Jacobson's	4
Limited	4
Talbot's	4
American Eagle	3
Buckle	4
Pottery Barn	3
7th Heaven	2
Ann Taylor	2
Champs	2
CLOTHING STORES	2
Comp USA	2
Dillon's	2
FAO Schwartz	2
Gap Kids	2
Just for Feet	2
Montgomery Ward's	2
TJ Maxx	2
Wilson's	2
Afterthoughts	1
Amoco	1
Asian Supermarket	1
Beauty Warehouse	1
Bed, Bath and Beyond	1
Beldon Jewelers	1
Brooks Brothers	1
Card Sharks	1
Casual Corner	1
Casual Male	1
Christian Book & Gift	1
Circuit City	1
Claire's	1
Cosmic Slop	1
Dayton's	1
Electronics Boutique	1
Elephant's Trunk	1

Foot Action	1
From the Heart	1
Function Junction	1
Grozo's	1
Gymboree	1
Hallmark	1
Halls	1
Harold's	1
Hobby Hand	1
Honda Dealership	1
HQ	1
Imagery	1
India Emporium	1
Jeans West	1
JJ's Bluebird Cafe	1
j. crew	1
MALL STORES	1
Marshal Fields	1
Maurice's	1
Museum Co	1
MUSIC STORES	1
Nordstrom's	1
OUTLET STORES	1
Penney's Outlet	1
Poetry Bard	1
Pess Stock	1
Priscilla's	1
Pure Art	1
RECORD STORES	1
Restoration Hardware	1
Rhodes	1
Sak's	1
Sallie's Choices	1
Service Merchandise	1
Sharper Image	1
Spencer Gifts	1
Sporting Goods Stores	1
Sports	1
Steinmart	1
Suburban Lawn & Garden	1
Super Target	1
Susie's	1
The Corner	1
USA	1
Vanderbilt's	1
Venture	1
Victoria's Secret	1
Walden Books	1
Wholesale Club	1
Williams-Sonoma	1
Zoony	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 from 1997 and 1996.

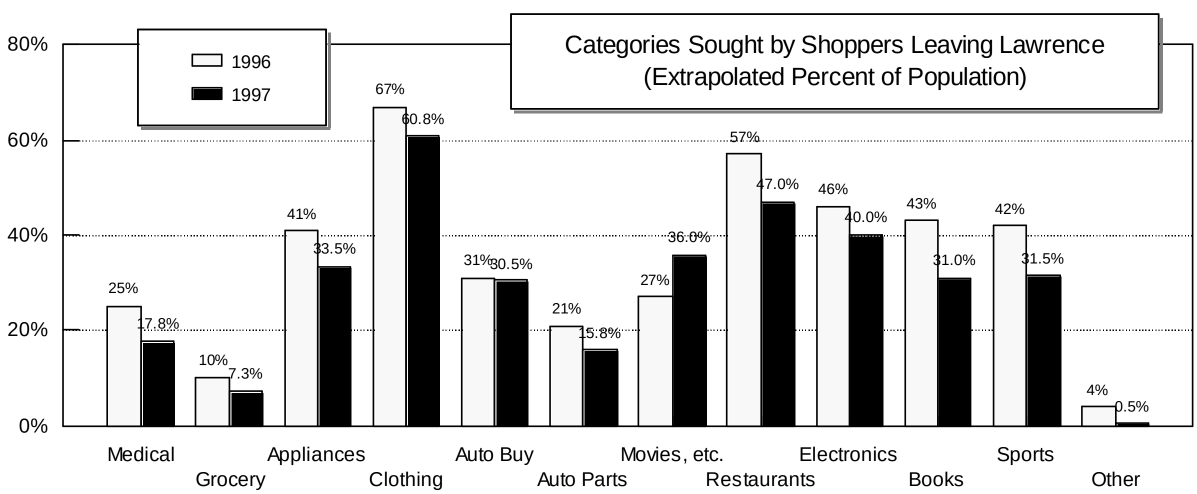
The categories listed in this table reflect a range of products and services that consumers could conceivably seek outside Lawrence. The list was formulated in an informal manner based on the personal experiences of economists and staff at IPPBR. It is possible to include other specific categories in 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.

Category	Sought by	1997 Pop %	1996 Pop %
Medical Services	22%	18%	25%
Grocery/Household Supplies	9%	7%	10%
Appliances/Home Furnishings	41%	34%	41%
Clothing/Apparel	75%	61%	67%
Automobile Purchase	38%	31%	31%
Auto Parts and/or Service	19%	16%	21%
Theater/Movies/Concerts	44%	36%	27%
Restaurants	58%	47%	57%
Electronics/Computers	49%	40%	46%
Books/Gifts	38%	31%	43%
Sporting Events	39%	32%	42%
Other Reasons	1%	1%	4%

Within the Other Reasons category, the only two mentioned were museums and the boat show.

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 feel they 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 and potential opportunity.

Also high on this list are restaurants (47 percent mention rate) and electronics/computers (40 percent). All categories but one experienced a relative drop from the percentages found in last year's survey. The sole exception was for movies, plays, concerts, etc. which, in spite of the opening of the new Southwind 12-plex, experienced an increase. Could it be that South Iowa is considered outside Lawrence?

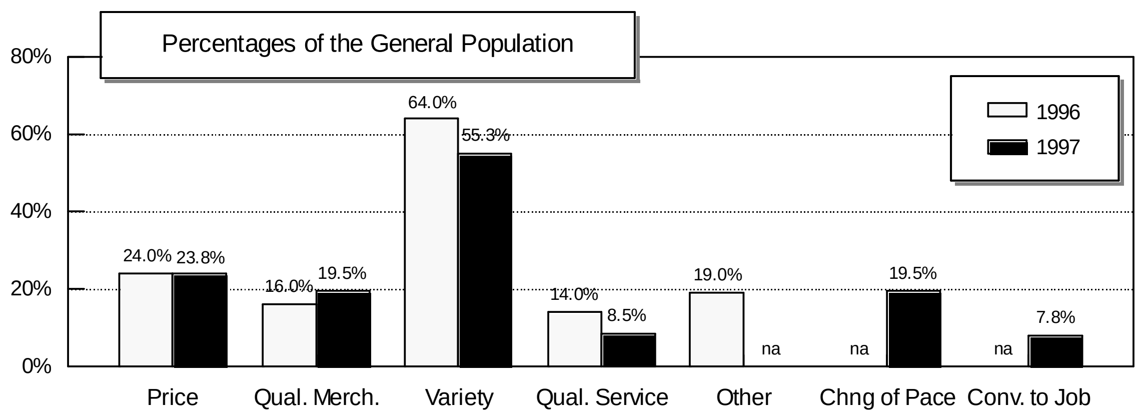


Question 6. *In general, why do you prefer to shop at this/these out-of-town location/s for these items or services?* Or *For the categories you've mentioned, why do you shop outside Lawrence?*

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	1997 Pop %	1996 Pop %
Prices	29%	24%	24%
Quality of Merchandise	24%	20%	16%
Variety of Selection	68%	55%	64%
Quality of Service	11%	9%	14%
Other reasons	n/a	n/a	19%
Change of Pace	24%	20%	n/a
Convenient to Job	10%	8%	n/a

Variety of Selection is an obviously strong factor in shopping decisions, being mentioned by 221 out of 324 respondents in 1997. Although the percentage is lower than last year, it still remains the strongest reason for shopping outside Lawrence.



Source: IPPBR Survey Data

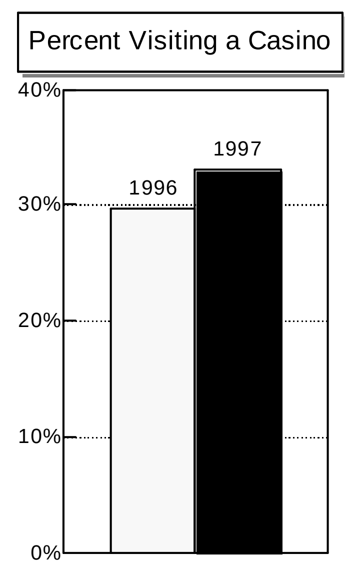
n/a - in 1996 survey categories "Change of Pace" and "Convenient to Job" were not offered. In 1997, after an addition of these two options, the "Other reasons" category was not mentioned by any respondents.

This year, two additional categories were added: Change of Pace and Convenient to Job. These are in response to information gained from last year's survey. Eighteen other responses were recorded, accounting for 5 percent of those asked. These responses can be categorized as follows:

Visiting friends and relatives	7
General familiarity with areas	4
Parking/access/crowds in downtown Lawrence unfavorable	4
Specific merchandise: antiques and brand names	2
Culture	1

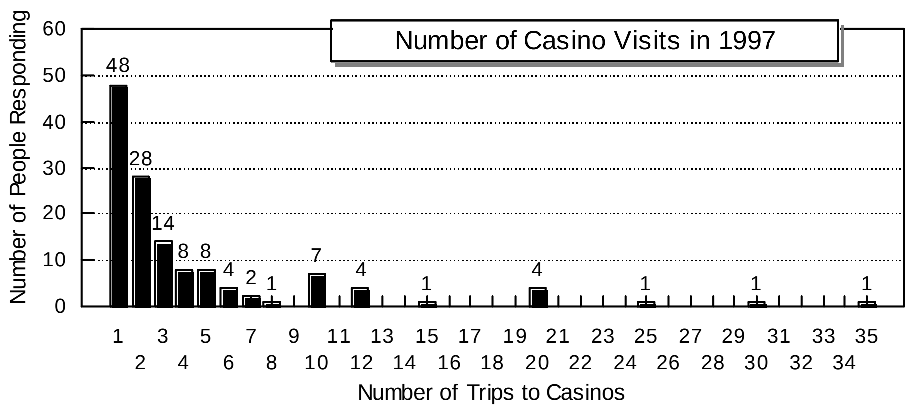
The "visiting friends and relatives" category negates the intent of the survey, which is to identify where and why people go for the purpose of shopping that cannot be satisfactorily found in Lawrence. As for the remaining categories, it is possible for city leaders and businesses to address only the ones regarding the crowds in downtown Lawrence. Given that only 4 out of the 324 (1.2 percent) asked this question mentioned this reason, it seems like a small concern. This is not to say that there are no parking, crowds or access problems downtown, only that they aren't the reasons these people don't go to shop there.

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



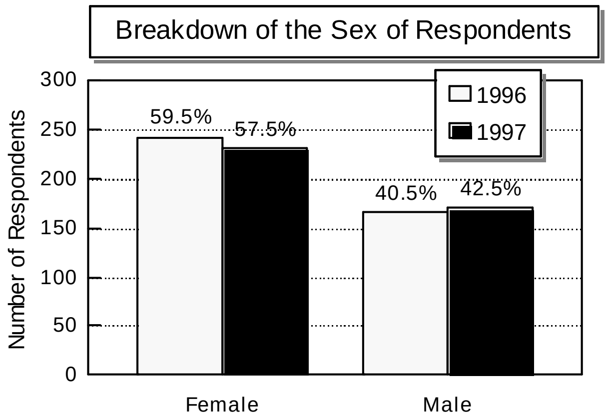
This question was asked in response to a specific concern about the perceived popularity of this growing entertainment option and the concern over diversion of sales tax revenue out of Douglas County. All those who took the survey were asked this question. It was found that 132 out of 400 respondents (33 percent) have visited a casino at least once within the past year, which is up from 30 percent in last year's survey.

On average, those who go to casinos have done so four times within the past year, with a range of a low of once this year to a high of 35 times in the past year.



DEMOGRAPHIC QUESTIONS

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



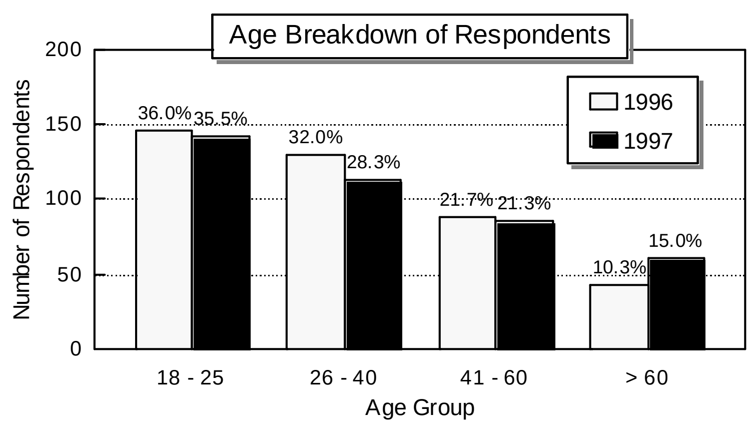
There were 230 female respondents (57.5 percent) and 170 male respondents (42.5 percent) out of the total of 400 people who took this survey.

Question 9. *What is your age group?*

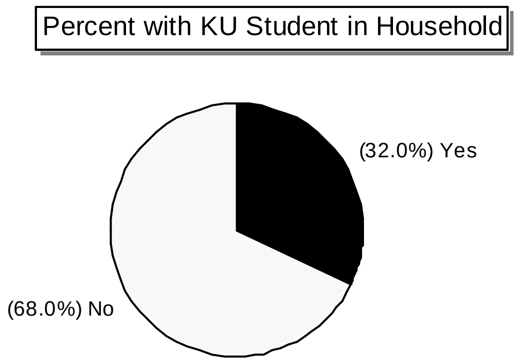
The age breakdown of the 400 respondents was as follows:

Category	Number	1997 %	1996%
18 to 25 years old	142	36%	36%
26 to 40 years old	113	28%	32%
41 to 60 years old	85	21%	22%
Over 60 years old	60	15%	10%

The random sample this year captured responses from more seniors than last year and fewer thirty-somethings.



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

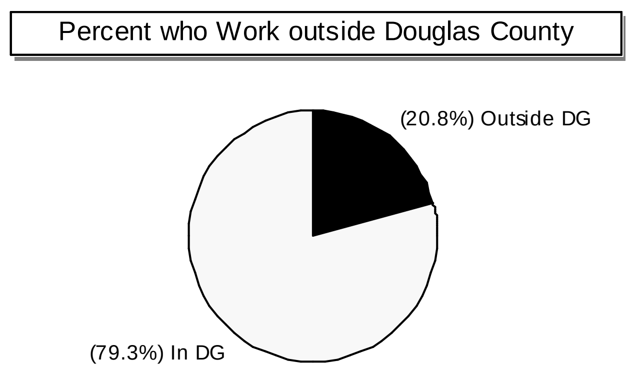


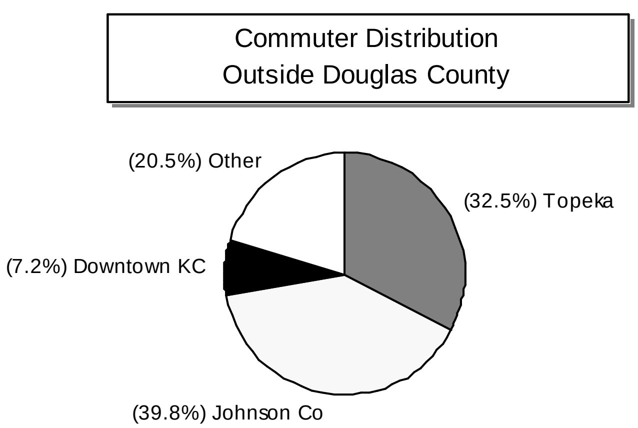
This is an attempt to qualify the responses received by measuring how many of them are due to college student priorities. Of the 400 respondents to this survey, 32 percent represent households with a KU student in a decision-making role.

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?*

This question is part of a body of data that will be included in a Commuting Patterns Survey Report later this year. It will be combined with data gathered from Lawrence companies regarding where their employees live. It will all be broken down by county. The basic data breakdown is shown here for informational purposes. Note that of the 400 people asked this question, almost 21 percent have a person in the household who works outside Douglas County.





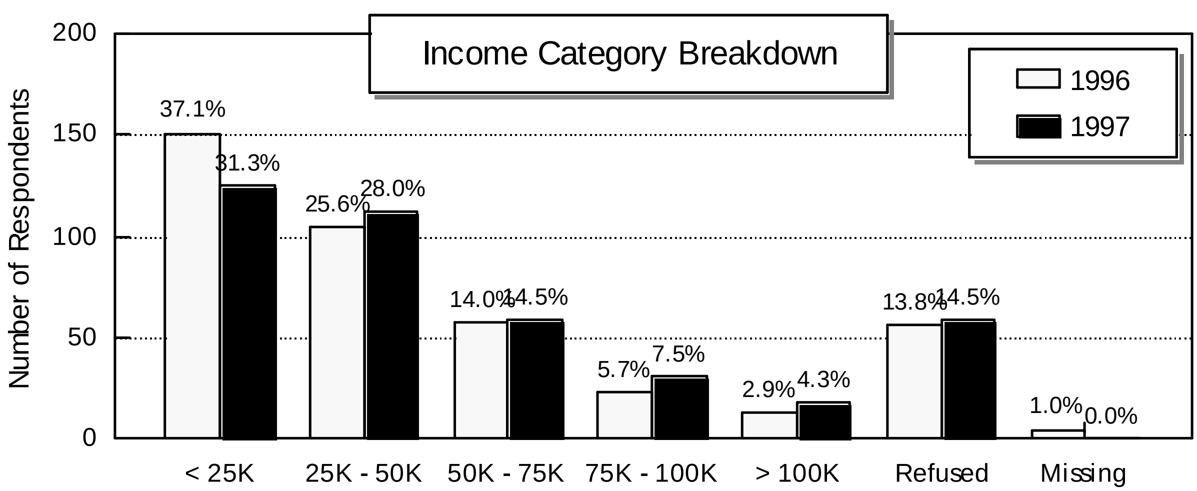
Nine different counties were mentioned. However, they have been grouped here based on proximity to the shopping locations defined in Question 3. Johnson County has the most, with almost 40 percent of commuters, with the Topeka area not far behind, with 33.5 percent.

Question 12. *And finally, which best describes your annual before-tax (household) income?*

This question was #10 on last year's survey. It 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:

Annual Income	Number	1997 %	1996 %
Less than $25,000	125	31%	37%
$25,000 to $50,000	112	28%	26%
$50,001 to $75,000	58	15%	14%
$75,001 to $100,000	30	8%	6%
Over $100,000	17	4%	3%
Refused	58	15%	14%

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.

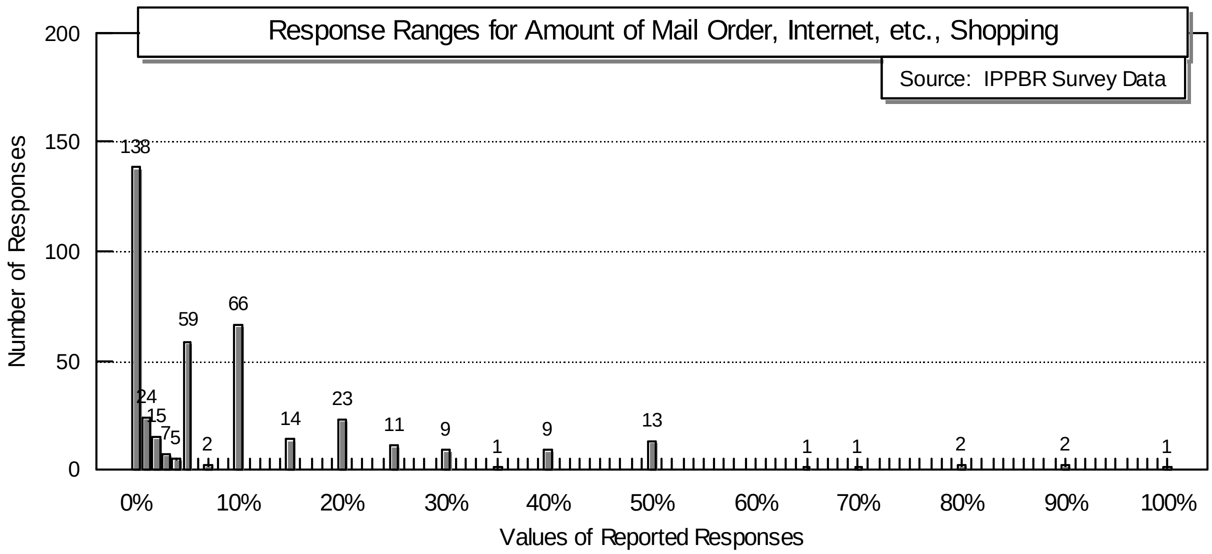


This concludes our survey.
Thank you.

What follows is a more detailed accounting of the data that have been reported so far. It was not possible to provide comparison to last year's report for the huge quantity of data presented here. The interested reader is encouraged to obtain a copy of last year's report (#240) from IPPBR, 785-864-3701.

DATA TABLES & GRAPHS

Graph of Question 1 data. This graph shows the distribution of the actual responses to this question. Read as follows: 138 respondents did none of their shopping using these alternative means, 66 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: 61 people said they did NO shopping outside Lawrence and 64 people said they did half of their shopping outside Lawrence. Since there were 400 respondents, this accounts for 14.9 percent and 15.7 percent, respectively. Fifty-two (12.8 percent) of the respondents did "most" of their shopping outside Lawrence.

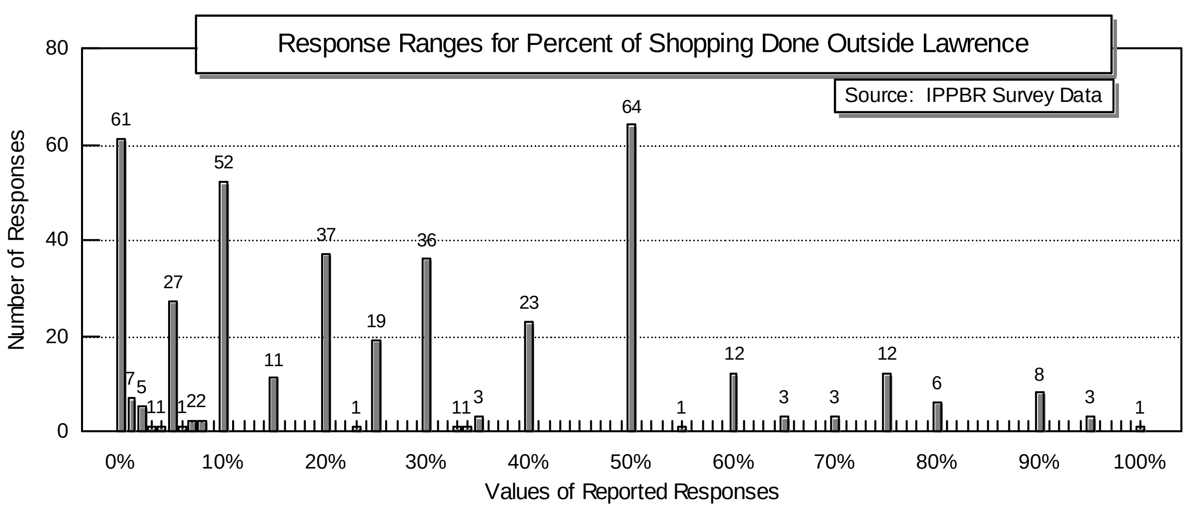


Table 1 - Basic data from question 3.

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	(177) 54.6%	11.7	13.5%	324
Population %	44.3%	5.2	6.0%	400
Johnson County	(263) 81.2%	15.0	2.02%	324
Population %	65.8%	9.9	13.3%	400
Kansas City	(126) 38.9%	6.7	7.7%	324
Population %	31.5%	2.1	2.4%	400
Other Places	(56) 17.3%	14.4	20.5%	324
Population %	14.0%	2.0	3.4%	400

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, for example, that about 66 percent of Lawrence residents intentionally go to the Johnson County area for the purpose of shopping, that they go there less frequently than once a month and they ultimately do about 13 percent of their total shopping in the stores there. This represents a reduction 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 5.

Goods and Services Sought	Number of times mentioned	Percentage of those asked this question	Percentage of the general population
Medical Services	71	21.9%	17.8%
Grocery/ Household Supplies	29	9.0%	7.3%
Appliances/ Home Furnishings	134	41.4%	33.5%
Clothing/Apparel	243	75.0%	60.8%
Automobile Purchases	122	37.7%	30.5%
Automobile Parts and/or Service	63	19.4%	15.8%
Theater/Movies/Concerts	144	44.4%	36.0%
Restaurants	188	58.0%	47.0%
Electronics/Computers	160	49.4%	40.0%
Books/Gifts	124	38.3%	31.0%
Sporting Events	126	38.9%	31.5%
Other Reasons	2	0.0%	0.0%

Source: IPPBR Survey Data

This table should be read as follows:

> The category of Clothing and Apparel was mentioned by 243 respondents, almost 75 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 61 percent of Lawrence residents find it necessary to shop out-of-town to fulfill their clothing needs. Once again, this is a decrease in all three measures from last year.

Table 3 - Basic data from question 6.

Reasons	Number of times mentioned	Percentage of those asked this question	Percentage of the general population
Prices	95	29.3%	23.8%
Quality of Merchandise	78	24.1%	19.5%
Variety of Selection	221	68.2%	55.3%
Quality of Service	34	10.5%	8.5%
Change of Pace	78	24.1%	19.5%
Convenient to Job	31	9.6%	7.8%

Source: IPPBR Survey Data

This table should be read as follows:

The reason "Variety of Selection" was mentioned by 221 respondents, representing over two-thirds 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 4 - Basic data from question 8.

Sex	Number	Percent of Total
Female	230	57.5%
Male	170	42.5%

Source: IPPBR Survey Data

Table 5 - Basic data from question 9.

Age	Number	Percent of Total
Age 18 - 25 yrs.	142	35.5%
Age 26 - 40 yrs.	113	28.3%
Age 41 - 60 yrs.	85	21.3%
Age > 60 yrs.	60	15.0%

Source: IPPBR Survey Data

Table 6 - Basic data from question 10.

KU Student	Number	Percent of Total
In Household	128	32.0%

Source: IPPBR Survey Data

Table 7 - Basic data from question 11.

Commute	Number	Percent of Total
Out of Douglas Co.	83	20.8%

Source: IPPBR Survey Data

Table 8 - Basic data from question 12.

Income	Number	Percent of Total
Income < $25K	125	31.3%
$25,000 to $50,000	112	28.0%
$50,001 to 75,000	58	14.5%
$75,001 to $100,000	30	7.5%
Over $100,000	17	4.3%
Refused	58	14.5%

Source: IPPBR Survey Data

DATA COMPARISONS

Table 9 - 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	10.2	400	25.3	400
Female	9.3	230	26.1	230
Male	11.5	170	24.2	170
Age 18 - 25 yrs.	7.7	142	35.4	142
Age 26 - 40 yrs.	11.3	113	23.5	113
Age 41 - 60 yrs.	10.9	85	19.8	85
Age > 60 yrs.	13.5	60	12.5	60
Income < $25K	8.8	125	28.7	125
$25K - $50K	8.4	112	21.0	112
$50K - $75K	9.7	58	24.7	58
$75K - $100K	13.3	30	29.0	30
Income > $100K	20.4	17	28.5	17
Income $ refused	12.9	58	23.9	58
KU Student - Yes	8.1	128	34.1	128
KU Student - No	11.2	272	21.2	272
Commuter - Yes	8.4	83	30.5	83
Commuter - No	10.7	317	23.9	317
Neither One	11.6	211	19.6	211

Source: IPPBR Survey Data

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

> For question 1, respondents over age 60 reported that they did, on average, 13.5 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 $25,000 and $50,000 reported that they did about 21 percent of their shopping outside Lawrence, a figure lower than the average for all respondents.

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

Topeka	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
All Respondents	11.7	177	13.5	177
Female	13.5	114	13.7	114
Male	8.5	63	13.1	63
Age 18 - 25 yrs.	13.3	49	16.5	49
Age 26 - 40 yrs.	9.6	60	13.5	60
Age 41 - 60 yrs.	14.4	43	10.0	43
Age > 60 yrs.	9.0	25	13.9	25
Income < $25K	10.4	39	15.3	39
$25K - $50K	14.7	50	12.8	50
$50K - $75K	9.6	38	12.5	38
$75K - $100K	9.9	19	13.5	19
Income > $100K	7.4	8	10.0	8
Income $ refused	14.1	23	15.0	23
KU Student - Yes	4.6	115	13.8	48
KU Student - No	7.4	209	13.4	129
Those who Commute to This Area	23.7	27	17.2	22

Source: IPPBR Survey Data

Read this series of tables as follows:

Female respondents made more trips to Topeka than male respondents, 13.5 times/year to 8.5 times/year, for the purpose of shopping, but they both did about the same amount of their total shopping there (between 13 percent and 14 percent).

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

Johnson County	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
All Respondents	12.2	263	20.2	263
Female	13.1	148	21.9	148
Male	11.0	115	18.0	115
Age 18 - 25 yrs.	16.0	100	25.2	100
Age 26 - 40 yrs.	11.0	84	17.6	84
Age 41 - 60 yrs.	10.1	57	18.3	57
Age > 60 yrs.	5.0	22	12.8	22
Income < $25K	11.3	76	23.6	76
$25K - $50K	11.6	69	17.7	69
$50K - $75K	9.8	43	16.0	43
$75K - $100K	15.7	27	19.3	27
Income > $100K	19.5	14	22.7	14
Income $ refused	12.9	34	22.6	34
KU Student - Yes	14.4	115	24.3	96
KU Student - No	11.0	209	17.9	167
Those who Commute to This Area	25.6	33	26.8	29

Source: IPPBR Survey Data

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

Kansas City	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
All Respondents	2.6	126	7.7	126
Female	3.0	71	7.9	71
Male	2.1	55	7.4	55
Age 18 - 25 yrs.	2.8	61	8.9	61 61
Age 26 - 40 yrs.	1.6	34	6.6	34
Age 41 - 60 yrs.	1.7	26	6.5	22
Age > 60 yrs.	7.0	9	6.7	9
Income < $25K	1.9	43	9.7	43
$25K - $50K	1.5	27	5.7	27
$50K - $75K	0.9	16	4.0	16
$75K - $100K	2.4	10	7.6	10
Income > $100K	5.8	7	9.7	7
Income $ refused	7.5	23	8.1	23
KU Student - Yes	2.4	115	8.8	58
KU Student - No	2.7	209	6.7	68
Those Who Commute to This Area	1.8	6	4.3	4

Source: IPPBR Survey Data

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

Other Places	Average # Trips / Year	Valid Cases	Percent of Total Shopping	Valid Cases
All Respondents	14.4	56	20.5	66
Female	15.6	28	17.4	33
Male	13.2	28	23.6	33
Age 18 - 25 yrs.	16.4	35	27.1	41
Age 26 - 40 yrs.	10.4	8	12.9	10
Age 41 - 60 yrs.	8.0	8	6.6	9
Age > 60 yrs.	16.8	5	8.8	6
Income < $25K	18.9	26	27.3	28
$25K - $50K	8.5	13	17.0	17
$50K - $75K	14.9	8	20.6	9
$75K - $100K	4.0	1	7.0	2
Income > $100K	8.5	2	6.3	3
Income $ refused	10.7	6	11.6	7
KU Student - Yes	16.6	29	24.3	35
KU Student - No	12.0	27	16.2	31

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

Goods or Services Sought	Medical	Grocery/ Household	Appliances/ Home Furnishings	Valid Cases
All Respondents	71 (21.9%)	29 (9.0%)	134 (41.4%)	324
Female	46 (25.1%)	17 (9.3%)	76 (41.5%)	183
Male	25 (17.7%)	12 (8.5%)	58 (41.1%)	141
Age 18 - 25 yrs.	39 (31.0%)8	8 (6.3%)	42 (33.3%)	126
Age 26 - 40 yrs.	14 (14.3%)	7 (7.2%)	49 (50.0%)	98
Age 41 - 60 yrs.	13 (19.1%)	9 (12.1%)	35 (50.5%)	68
Age > 60 yrs.	5 (15.6%)	5 (15.6%)	8 (25.0%)	32
Income < $25K	26 (27.1%)	4 (4.2%)	27 (28.1%)	96
$25K - $50K	15 (16.7%)	10 (11.1%)	39 (43.3%)	90
$50K - $75K	13 (25.5%)	4 (7.8%)	24 (47.1%)	51
$75K - $100K	5 (17.2%)	3 (10.3%)	16 (55.2%)	29
Income > $100K	5 (29.4%)	1 (5.9%)	8 (47.1%)	17
Income $ refused	7 (17.1%)	7 (17.1%)	20 (48.8%)	41
KU Student - Yes	31 (27.0%)	6 (5.2%)	35(30.4%)	115
KU Student - No	40 (19.1%)	23 (11.0%)	99 (47.4%)	209
Commuter - Yes	19 (26.4%)	3 (4.2%)	44 (61.1%)	72
Commuter - No	52 (20.6%)	26 (10.3%)	90 (35.7%)	252
Neither One	28 (17.7%)	20 (12.7%)	64 (40.5%)	158

Source: IPPBR Survey Data

Read the this series of tables as follows:

> Of the 29 respondents with household earnings between $75,000 and $100,000 who were asked this question, 16 reported appliances and home furnishings as one of the categories that they shopped for outside Lawrence. This is a “mention rate” of 55 percent and the highest of any demographic category. 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 14 - 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
All Respondents	243 (75.0%)	122 (37.7%)	63 (19.4%)	324
Female	141 (77.0%)	73 (39.9%)	38 (20.8%)	183
Male	102 (72.3%)	49 (34.8%)	25 (17.7%)	141
Age 18 - 25 yrs.	102 (81.0%)	51 (40.5%)	31 (24.6%)	126
Age 26 - 40 yrs.	68 (69.4%)	38 (38.8%)	22 (22.4%)	98
Age 41 - 60 yrs.	51 (75.0%)	25 (36.8%)	7 (10.3%)	68
Age > 60 yrs.	22 (68.8%)	8 (25.0%)	3 (9.4%)	32
Income < $25K	74 (77.1%)	41 (42.7%)	25 (26.0%)	96
$25K - $50K	61 (67.8%)	25 (27.8%)	11 (12.2%)	90
$50K - $75K	34 (66.7%)	21 (41.2%)	12 (23.5%)	51
$75K - $100K	21 (72.4%)	12 (41.4%)	5 (17.2%)	29
Income > $100K	17 (100.0%)	6 (35.3%)	4 (23.5%)	17
Income $ refused	36 (87.8%)	17 (41.5%)	6 (14.6%)	41
KU Student - Yes	93 (80.9%)	45 (39.1%)	30 (26.1%)	115
KU Student - No	150 (71.8%)	77 (36.8%)	33 (15.8%)	209
Commuter - Yes	57 (79.2%)	36 (50.0%)	19 (26.4%)	72
Commuter - No	186 (73.8%)	86 (34.1%)	44 (17.5%)	252
Neither One	113 (71.5%)	51 (32.3%)	19 (12.0%)	158

Source: IPPBR Survey Data

Table 14 - Cross-tabulation of question 5 with demographics. p. 3 of 4

Goods or Services Sought	Movies/ Theater/ Concerts	Restaurants	Electronics/ Computers	Valid Cases
All Respondents	144 (44.4%)	188 (58.0%)	160 (49.4%)	324
Female	75 (41.0%)	106 (57.9%)	79 (43.2%)	183
Male	69 (48.9%)	82 (58.2%)	81 (57.4%)	141
Age 18 - 25 yrs.	69 (54.8%)	78 (61.9%)	69 (54.8%)	126
Age 26 - 40 yrs.	43 (43.9%)	56 (57.1%)	54 (55.1%)	98
Age 41 - 60 yrs.	23 (33.8%)	36 (52.9%)	29 (42.6%)	68
Age > 60 yrs.	9 (28.1%)	18 (56.3%)	8 (25.0%)	32
Income < $25K	47 (49.0%)	52 (54.2%)	45 (46.9%)	96
$25K - $50K	39 (43.3%)	49 (54.4%)	50 (55.6%)	90
$50K - $75K	19 (37.3%)	31 (60.8%)	22 (43.1%)	51
$75K - $100K	16 (55.2%)	15 (51.7%)	16 (55.2%)	29
Income > $100K	7 (41.2%)	15 (88.2%)	9 (52.9%)	17
Income $ refused	16 (39.0%)	26 (63.4%)	18 (43.9%)	41
KU Student - Yes	64 (55.7%)	73 (63.5%)	59 (51.3%)	115
KU Student - No	80 (38.3%)	115 (55.0%)	101 (48.3%)	209
Commuter - Yes	28 (38.9%)	40 (55.6%)	41 (56.9%)	72
Commuter - No	116 (46.0%)	148 (58.7%)	119 (47.2%)	252
Neither One	61 (38.6%)	86 (54.4%)	73 (46.2%)	158

Source: IPPBR Survey Data

Table 14 - Cross-tabulation of question 5 with demographics. p. 4 of 4

Goods or Services Sought	Books & Gifts	Sporting Events	Valid Cases
All Respondents	124 (38.3%)	126 (38.9%)	324
Female	67 (36.6%)	69 (37.7%)	204
Male	57 (40.4%)	57 (40.4%)	142
Age 18 - 25 yrs.	47 (37.3%)	60 (47.6%)	132
Age 26 - 40 yrs.	41 (41.8%)	40 (40.8%)	114
Age 41 - 60 yrs.	30 (44.1%)	22 (32.4%)	73
Age > 60 yrs.	6 (18.8%)	4 (12.5%)	27
Income < $25K	37 (38.5%)	40 (41.7%)	120
$25K - $50K	37 (41.1%)	33 (36.7%)	90
$50K - $75K	16 (31.4%)	20 (39.2%)	53
$75K - $100K	9 (31.0%)	10 (34.5%)	22
Income > $100K	8 (47.1%)	9 (52.9%)	12
Income $ refused	17 (41.5%)	14 (34.1%)	46
KU Student - Yes	49 (42.6%)	52 (45.2%)	115
KU Student - No	75 (35.9%)	74 (35.4%)	209
Commuter - Yes	30 (41.7%)	34 (47.2%)	72
Commuter - No	94 (37.3%)	92 (36.5%)	252
Neither One	53 (33.5%)	53 (33.5%)	158

Source: IPPBR Survey Data

Table 15 - Cross-tabulation of question 6 with demographics. p. 1 of 2

Reasons	Price	Quality of Merchandise	Variety of Selection	Valid Cases
All Respondents	95 (29.3%)	78 (24.1%)	221 (68.2%)	324
Female	58 (31.7%)	46 (25.1%)	128 (69.9%)	183
Male	37 (26.2%)	32 (22.7%)	983(66.0%)	141
Age 18 - 25 yrs.	25 (19.8%)	33 (26.2%)	86 (68.3%)	126
Age 26 - 40 yrs.	39 (39.8%)	21 (21.4%)	68 (69.4%)	98
Age 41 - 60 yrs.	19 (27.9%)	18 (26.5%)	48 (70.6%)	68
Age > 60 yrs.	12 (37.5%)	6 (18.8%)	19 (59.4%)	32
Income < $25K	20 (20.8%)	17 (17.7%)	65 (67.7%)	96
$25K - $50K	29 (32.2%)	28 (31.1%)	60 (66.7%)	90
$50K - $75K	12 (23.5%)	11 (21.6%)	43 (64.7%)	51
$75K - $100K	13 (44.8%)	7 (24.1%)	20 (69.0%)	29
Income > $100K	4 (23.5%)	6 (35.3%)	11 (64.7%)	17
Income $ refused	17 (41.5%)	9 (22.0%)	32 (68.2%)	41
KU Student - Yes	24 (20.9%)	29 (25.2%)	84 (73.0%)	115
KU Student - No	71 (34.0%)	49 (23.4%)	137 (65.6%)	209
Commuter - Yes	17 (23.6%)	22 (30.6%)	49 (68.1%)	72
Commuter - No	78 (31.0%)	56 (22.2%)	172 (68.3%)	252
Neither One	55 (34.8%)	32 (20.3%)	103 (65.2%)	158

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, it was mentioned most frequently by respondents with household incomes between $75,000 and $100,000 (almost 45 percent).

Table 15 - Cross-tabulation of question 6 with demographics. p. 2 of 2

Reasons	Quality of Service	Change of Pace	Convenient to Job	Valid Cases
All Respondents	34 (10.5%)	78 (24.1%)	31 (9.6%)	324
Female	15 (8.2%)	45 (24.6%)	16 (8.7%)	183
Male	19 (13.5%)	33 (23.4%)	15 (10.6%)	141
Age 18 - 25 yrs.	16 (12.7%)	30 (23.8%)	11 (8.7%)	126
Age 26 - 40 yrs.	7 (7.1%)	22 (22.4%)	7 (7.1%)	98
Age 41 - 60 yrs.	11 (16.2%)	19 (27.9%)	12 (17.6%)	68
Age > 60 yrs.	0 (0.0%)	7 (21.9%)	1 (3.1%)	32
Income < $25K	10 (10.4%)	27 (28.1%)	6 (6.3%)	96
$25K - $50K	12 (13.3%)	24 (26.7%)	8 (8.9%)	90
$50K - $75K	2 (3.9%)	10 (19.6%)	5 (9.8%)	51
$75K - $100K	2 (6.9%)	4 (13.8%)	3 (10.3%)	29
Income > $100K	4 (23.5%)	6 (35.3%)	2 (11.8%)	17
Income $ refused	4 (9.8%)	7 (17.1%)	7 (17.1%)	41
KU Student - Yes	15 (13.0%)	28 (24.3%)	6 (5.2%)	115
KU Student - No	19 (9.1%)	50 (23.9%)	25 (12.0%)	209
Commuter - Yes	13 (18.1%)	16 (22.2%)	16 (22.2%)	72
Commuter - No	21 (8.3%)	62 (24.6%)	15 (6.0%)	252
Neither One	9 (5.7%)	40 (25.3%)	10 (6.3%)	158

Source: IPPBR Survey Data

Table 16 - Cross-tabulation of questions 7 and 11 with demographics.

Casino Visits & Commuting	Visited Casino in Past Year	Average # of Visits	Work Outside Douglas Co.	Valid Cases
All Respondents	132 (33.0%)	4.3	83 (20.8%)	400
Female	74 (32.2%)	3.9	53 (23.0%)	230
Male	58 (34.1%)	4.8	30 (17.6%)	170
Age 18 - 25 yrs.	42 (29.6%)	5.4	29 (20.4%)	142
Age 26 - 40 yrs.	48 (42.5%)	3.4	29 (25.7%)	113
Age 41 - 60 yrs.	29 (34.1%)	5.0	25 (29.4%)	85
Age > 60 yrs.	13 (21.7%)	2.6	0 (0%)	60
Income < $25K	32 (25.6%)	5.5	12 (9.6%)	125
$25K - $50K	43 (38.4%)	2.6	25 (22.3%)	112
$50K - $75K	21 (36.2%)	2.6	18 (31.0%)	58
$75K - $100K	8 (26.7%)	3.5	9 (30.0%)	30
Income > $100K	7 (41.2%)	9.1	7 (41.2%)	17
Income $ refused	21 (36.2%)	6.2	12 (20.7%)	58
KU Student - Yes	44 (34.4%)	5.0	22 (17.2%)	128
KU Student - No	88 (32.4%)	3.9	61 (22.4%)	272
Commuter - Yes	33 (39.8%)	3.7	n/a	83
Commuter - No	99 (31.2%)	4.5	n/a	317
Neither One	68 (32.2%)	4.1	n/a	211

Source: IPPBR Survey Data

A total of 132 people, out of 400 asked, reported that they had been to a casino in the Kansas City area within the last year (33 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:

> Females are the most likely to have visited a casino within the last year; however the men that go do so more often.

The data on commuting is presented as basic information. A more thorough analysis will be published later this year. For now, note that the percentages of people who work outside Douglas County vary directly with the amount of income they earn.

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 baseline provided by the 1997 and 1998 report data. It may also verify that the trends that seem to be occurring are factual. It would be especially useful to gather data in any year in which 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 causal relationship 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. However, there are indications that the changes in the retail market within Lawrence might be having the desired effect on the shopping behavior of our residents. 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.

Additional value in this survey is the information on commuting patterns and income of those commuting to work outside Douglas County. This information was previously unavailable. These data will benefit all interested in the economic development of Douglas County.