

2002 Wyandotte County Retail Survey Summary

This retail survey summary contains a "Survey Overview" section discussing the purpose of the survey, who the survey was sent to, how many people received the survey, etc. The second section, "Survey Findings", focuses on results for selected questions. Attached at the end of this written summary is an appendix. In the appendix, among other items, is the survey questionnaire showing results for all questions compared to 1996 survey results where applicable.

SURVEY OVERVIEW

- The Wyandotte County 2002 retail survey was a cooperative effort with the Kansas City Kansas Community College Department of Sociology/Economics and the Unified Government Research Division.
- The purpose of the survey was to understand retail shopping attitudes in Wyandotte County before development of the 400 acres (Village West) adjacent to the Kansas Speedway. A second survey is planned for the future to understand how retail shopping patterns of Wyandotte County residents may change after most of the development adjacent to the speedway is complete.
- The survey was mailed in late July to a random sample of Wyandotte County residents. (Cabela's opened in mid-August)
- 2,256 surveys were mailed; the adjusted response rate was 18.7%
- The County was divided into six geographic areas to aid in the analysis of the survey results. (SEE MAP IN APPENDIX)
- The number of households that returned the survey by area was representative of the percent of households for each area based on US Census data. (SEE TABLE 1, APPENDIX)
- Somewhat over-represented in the sample were: homeowners, females, persons aged 55 and over, and households with income between \$25,000 and \$49,999. Under-represented were those that indicated they were of Hispanic origin.

SURVEY FINDINGS

QUESTION 3 – What portion of all retail purchases does your household make in Wyandotte County?

- The percentage of respondents doing **nearly all** of their shopping in Wyandotte County declined from 24% on the 1996 survey to 17%. Further, 46% indicated making **less than one-fourth** of all retail purchases in the County. This is an increase from 34% on the 1996 survey.
- Respondents in the **east** (25%) and **northcentral** (20%) areas of the County (SEE MAP IN APPENDIX) were more likely than other areas to indicate that **nearly all** of their retail purchases were done in the County. Additionally, those that said they do nearly all of their shopping in the County were more likely to have **household incomes less than \$25,000**.
- The **northwest** (85%) and **southeast** (67%) areas of the County were those in which respondents were more likely than other areas to do **less than one-fourth** of their shopping in the County. Respondents in these areas indicated having **household incomes of \$75,000 or more**.

QUESTION 4 – WHERE DO THOSE IN YOUR FAMILY MOST FREQUENTLY PURCHASE ITEMS OUTSIDE OF WYANDOTTE COUNTY?

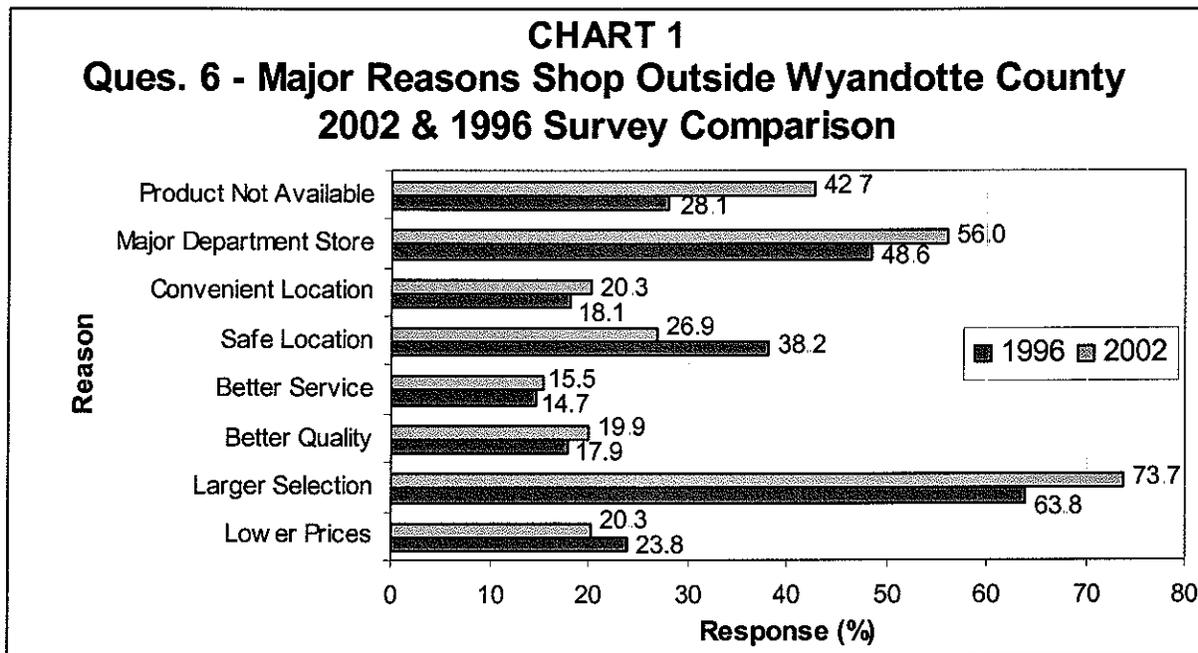
- **Oak Park mall** and **Shawnee Station** (Shawnee Mission Parkway and I-435) were chosen by respondents as their favorite places to shop outside of Wyandotte County. Over 50% of respondents indicated they prefer these two areas. Oak Park was also the favorite shopping destination of Wyandotte County residents as indicated on the 1996 retail survey.
- **Mission Mall/Johnson Drive** (48%) and **Merriam Town Center** (36%) were the next places for respondents to indicate where they like to shop at outside the County.

QUESTION 5 – HOW OFTEN DO YOU BUY SOME OF THE FOLLOWING PRODUCTS AND SERVICES IN WYANDOTTE COUNTY?

- Twenty-four percent of respondents indicated they “always/almost always” purchase **building materials and garden supplies** in the County. This is down from 57% on the 1996 survey for the same category.
- Other retail categories that showed a decrease in being purchased “always/almost always” include: **hardware** – 31%, 62% in 1996; **Food (groceries)** – 55%, 67% in 1996; **drug stores** – 62%, 70% in 1996; and **restaurants** – 13%, 19% in 1996.
- The top 3 retail products/services that were indicated as “Never buy in Wyandotte County” include: **electronics/computers** (58%), **furniture** (57%) and **movies** (53%). Generally, these represent increases from the 1996 survey except for movies which was not a category on the 1996 survey.

QUESTION 6 – WHAT ARE THE MAJOR REASONS YOU SHOP FOR RETAIL ITEMS OUTSIDE OF WYANDOTTE COUNTY? (SEE CHART 1, BELOW)

- The main reason Wyandotte County residents said they shop outside the County is that they desire a **larger selection (74%)**.
- Respondents seem to feel less of a need to shop outside the County because they are seeking a **safe location** to do their shopping. Twenty-seven percent indicated they shopped outside the County because it was safer as opposed to 38% on the 1996 survey.
- Those in the southcentral and southeast areas of the County were more likely to leave the County to shop due to **convenient locations**. Whereas, respondents in the northcentral, northwest and southwest areas shop elsewhere because **products they seek are not available** in Wyandotte County.



QUESTION 7 – WHAT TYPES OF BUSINESSES ARE MOST NEEDED IN WYANDOTTE COUNTY?

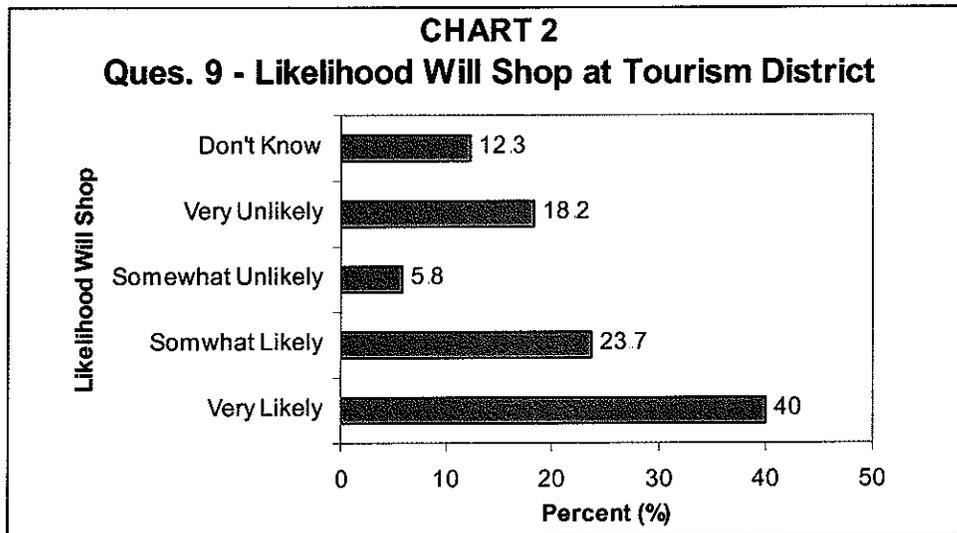
- Respondents felt that **restaurants (74%)** were the most needed type of business in the County. Restaurants were also chosen most frequently by respondents on the 1996 retail survey (64%).
- After restaurants, the businesses respondents indicated as being the most needed in the County were: **women’s clothing (55%, 59% in 1996)**, **movies (49%, N/A in 1996)**, **men’s clothing (40%, 45% in 1996)** and **building materials and garden supplies (37%, 9% in 1996)**.

QUESTION 8 – Which retail business(es) do your household members feel are needed in Wyandotte County? (SEE TABLES 2 & 3 IN APPENDIX)

- **JcPenny** was listed most frequently as the department store most needed in the County. This was followed by the **Jones Store** and **Sears**.
- **Target/Super Target** and **Home Depot** were indicated by respondents as the most needed general merchandise and home improvement stores in the County.
- Non-fast food, mid-price range family style restaurants were listed most frequently by respondents. The restaurants most often listed were **Applebee's**, **Olive Garden** and **Old Country Buffet**.

QUESTION 9 – HOW LIKELY WILL YOUR HOUSEHOLD BE TO SHOP AT THE TOURISM DISTRICT? (SEE CHART 2, BELOW)

- Overall, sixty-four percent of survey respondents felt that they would be **very to somewhat likely** to shop at Village West (Tourism District).
- The **northwest, southwest** and **northcentral** areas of the County were locations in which respondents indicated more than other areas that they would be **very likely** to shop at Village West. Respondents in the **southcentral** and **southeast** areas indicated they were **somewhat likely** and those in the **eastern** portion of the County are **unlikely** to shop at Village West compared to other areas of the County.



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APPENDIX

- **Table 1** – Survey Statistics
- **Table 2** – Survey Question 8 (restaurants/specialty foods)
- **Table 3** – Survey Question 8 (department, general merchandise and home improvement stores)
- **Map** showing County divided into six geographic summary areas
- **Survey Questionnaire** with 2002 and 1996 survey results

TABLE 1
2002 Wyandotte County Retail Survey
Survey Statistics

Area	2000 Census		Survey Statistics			
	# Households	Pct. Households	# Sent	# Received	Response Rate	Pct. of Total Received
East	18,343	30.7%	670	90	13.4%	27.1%
Southeast	10,660	17.9%	341	53	15.5%	16.0%
Northcentral	16,492	27.6%	432	105	24.3%	31.6%
Southcentral	7,637	12.8%	213	49	23.0%	14.8%
Northwest	2,387	4.0%	38	13	34.2%	3.9%
Southwest	4,181	7.0%	91	22	24.2%	6.6%
Total	59,700	100.0%	1,785	332	18.6%	100.0%

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TABLE 2
2002 Wyandotte County Retail Survey
Question 8 Responses - "What retail businesses do your household members feel are needed in Wyandotte County?"

RESTAURANTS	Count
restaurants	23
restaurants, nicer/not fast food	17
Applebees	15
Olive Garden	7
Old Country Buffet	6
Outback Steakhouse	5
Red Lobster	5
TGI Fridays	5
Bob Even Rest.	4
Margarita's	4
Chilli's	3
Furr's	2
Jackstack BBQ	2
Lone Star Steakhouse	2
Tippins	2
54th Street Bar & Grill	1
Backyard Burger	1
Boston Tea Party	1
Champs	1
Cheesecake Factory	1
Chucky Cheese	1
Dairy Queen	1
Fazoli's	1
Fuddruckers	1
Golden Corral	1
Houston's	1
IHOP	1
Jack n' Box	1
Jason's Deli	1
Joe's Crab Shack	1
Krispy Kreme	1
Macaroni Grill	1
Mr. Goodscents	1
Panera Bread	1
pizza	1
Popeye's Chicken	1
Quizno's Subs	1
Rainforest Café	1
seafood	1
Smokehouse BBQ	1
steakhouse	1
UNO Chicago	1
Total Responses	129

SPECIALTY FOOD PLACES	Count
icecream parlors	2
donut shops	1
Einstein Bros. Bagels	1
Starbucks	1
Total Responses	5

TABLE 3
2002 Wyandotte County Retail Survey
Question 8 Responses - "What retail businesses do your household members feel are needed in Wyandotte County?"

DEPARTMENT STORES	Count
JCPenny	43
Jones Store	37
Sears	30
Kohl's	26
Dillards	22
department stores	9
Gordman's	6
Marshall's	4
TJ Maxx	2
1/2 Price Store	2
Montgomery Wards	2
Macy's	2
SteinMart	1
Total Responses	186

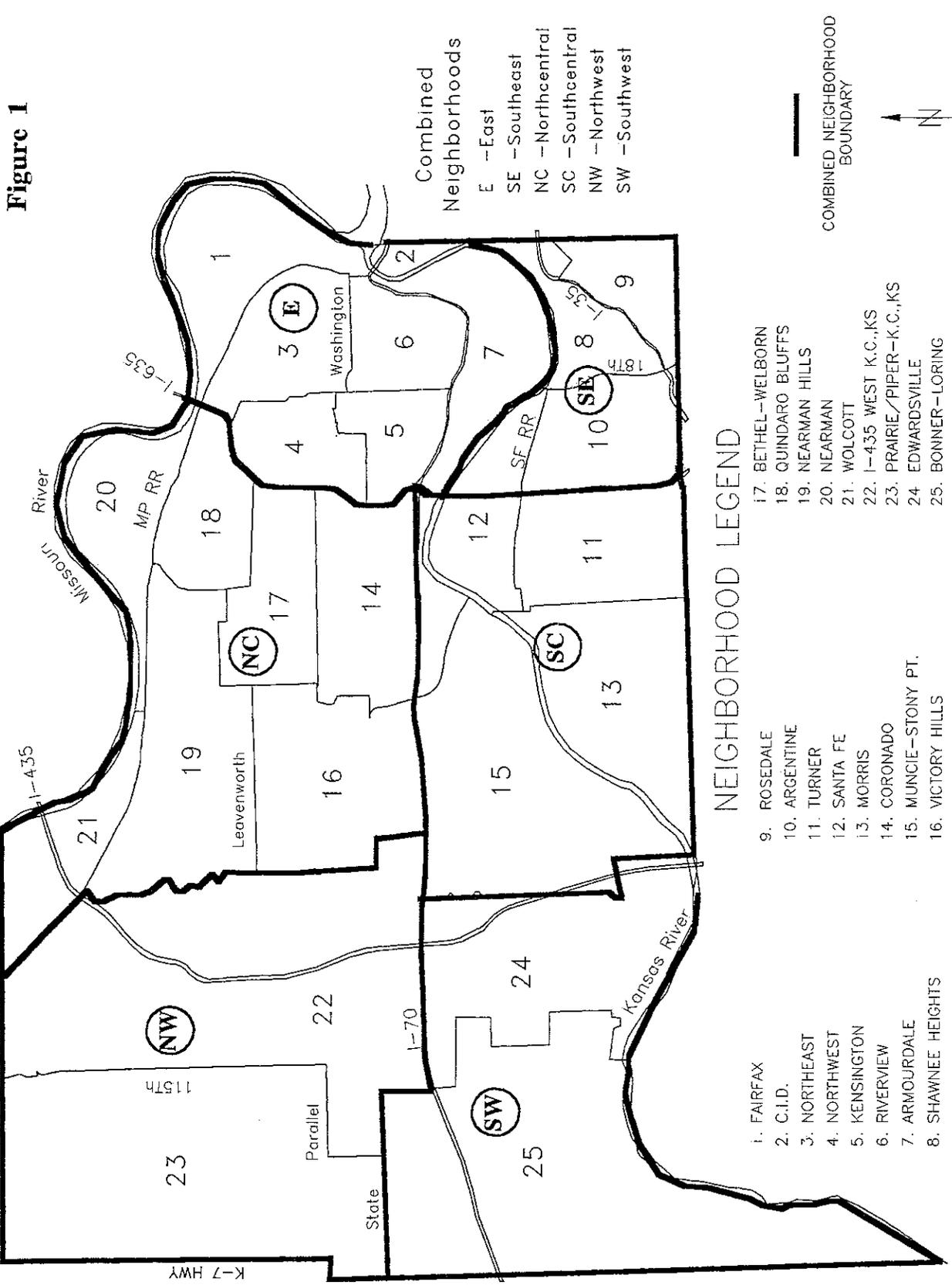
GENERAL MERCHANDISE STORES	Count
Target/Super Target	57
Walmart/Super Walmart/HyperMart	36
Sam's Club	12
Costco	7
Kmart	7
Woolco	1
Total Responses	120

HOME IMPROVEMENT	Count
Home Depot	33
Lowe's	29
home/building supplies	1
Total Responses	63

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WYANDOTTE COUNTY COMBINED NEIGHBORHOODS

Retail Survey Summary Report



RETAIL SURVEY FOR WYANDOTTE COUNTY, KANSAS

DIRECTIONS: An adult member(s) of the household should complete the survey. When answering the questions, please take into consideration everyone in your household. To ensure that your response is included, please return your survey by August 16, 2002.

Please circle the number of the appropriate answer for each of the following questions. Circle only one number unless other directions are given.

(Note: RED percentages (LEFT) indicate 2002 survey results; BLUE percentages (RIGHT) indicate 1996 survey results)

1. When do members of your household most frequently shop?

35.1% WEEKDAYS 9AM-5PM 36.8%
22.3% WEEKDAY EVENINGS 14.8%
42.7% WEEKENDS 48.4%

2. How do members of your household travel most often to shopping areas?

98.8% AUTOMOBILE 96.1%
.9% BUS 1.0%
.3% TAXI .2%
OTHER 2.7% _____

3. What portion of all retail purchases does your household make in Wyandotte County?

17.4% NEARLY ALL 24.0%
13.1% ONE-HALF TO THREE-QUARTERS 18.0%
23.9% ONE-FOURTH TO ONE-HALF 24.5%
45.6% LESS THAN ONE-FOURTH 33.9%

4. Where do those in your family most frequently purchase items outside of Wyandotte County?
(Circle up to five choices)

22.4% 119TH AND METCALF AREA 12.3%
5.6% BANNISTER MALL AREA 9.6%
16.8% BARRY ROAD / I-29 AREA N/A
3.4% BLUE RIDGE MALL / NOLAND ROAD AREA 2.6%
15.3% CATALOG / MAIL ORDER 15.6% (combined with CABLE T.V. below)
2.8% CABLE T.V. (SHOPPING NETWORKS) (combined with "CATALOG/MAIL ORDER" above)
7.8% COMPUTER / INTERNET N/A
5.3% DOWNTOWN KANSAS CITY, MISSOURI / CROWN CENTER 5.7%
9.7% I-435 / MIDLAND DRIVE AREA N/A
7.2% KANSAS CITY, MISSOURI PLAZA AND WESTPORT AREA 6.1%
13.4% LEAVENWORTH / LANSING AREA 7.7%
3.1% LEAWOOD TOWN CENTER PLAZA (118TH & NALL) N/A
36.1% MERIAM TOWN CENTER (I-35 AND JOHNSON DRIVE) N/A
33.6% METCALF SOUTH AREA 39.3%
24.6% METRO NORTH MALL AREA 21.2%
47.7% MISSION MALL / JOHNSON DRIVE AREA 30.3%
50.5% OAK PARK MALL 49.2%
50.5% SHAWNEE STATION AREA (SHAWNEE MISSION PARKWAY & I-435) N/A
19.0% THE GREAT MALL OF THE GREAT PLAINS (OLATHE) N/A
OTHER _____

5 How often do you buy some of the following products and services in Wyandotte County (WYCO)? On a scale from 1 to 5, the number "1" represents "Always buy in WYCO" and "5" represents "Never buy in WYCO" Please circle the number that most closely describes where you buy the following products and services.

		Always buy in WYCO		Sometimes buy in WYCO		Never buy in WYCO	Don't buy N/A
1.	BUILDING MATERIALS AND GARDEN SUPPLIES	15.7%	8.5%	33.9%	12.9%	20.4%	8.8%
2.	HARDWARE	17.6%	13.8%	34.2%	12.2%	16.0%	6.3%
3.	AUTOMOBILES	18.3%	9.6%	18.3%	9.0%	34.9%	9.9%
4.	AUTO PARTS	29.2%	13.8%	24.0%	9.9%	14.1%	9.0%
5.	WOMEN'S CLOTHING	6.9%	3.1%	24.5%	17.0%	40.3%	8.2%
6.	MEN'S CLOTHING	5.8%	4.2%	20.3%	16.1%	41.3%	12.3%
7.	CHILDREN'S CLOTHING	5.8%	3.6%	20.1%	10.4%	32.1%	27.9%
8.	SHOES	8.3%	3.5%	21.3%	14.3%	49.8%	2.9%
9.	JEWELRY	6.4%	3.2%	16.7%	12.9%	45.0%	15.8%
10.	SPORTING GOODS	5.9%	2.0%	16.4%	14.5%	35.5%	25.7%
11.	FURNITURE	6.4%	5.1%	12.5%	11.5%	56.5%	8.0%
12.	HOUSEHOLD APPLIANCES	8.5%	5.6%	20.0%	14.1%	46.2%	5.6%
13.	DRUG STORES	43.6%	18.4%	18.7%	6.1%	10.7%	2.5%
14.	FOOD (GROCERY, BAKERY)	29.8%	24.8%	27.6%	8.0%	9.2%	.6%
15.	RESTAURANTS	6.6%	6.3%	42.0%	24.3%	18.6%	2.2%
16.	BOOKS / MUSIC	6.8%	3.9%	20.3%	15.8%	42.1%	11.3%
17.	MOVIES	18.5%	3.9%	12.7%	7.2%	52.8%	14.9%
18.	HOBBY / CRAFT	4.5%	2.6%	13.6%	16.6%	44.5%	18.2%
19.	CARD / GIFT SHOP	15.5%	10.4%	29.4%	11.7%	26.3%	6.6%
20.	ELECTRONICS / COMPUTERS	4.2%	2.6%	10.4%	10.4%	57.8%	14.6%

6. What are the major reasons you shop for retail items outside of Wyandotte County? (Circle up to three choices.)

- | | | | | | |
|-------|------------------|-------|-------------|-------------------------|-------|
| 20.3% | LOWER PRICES | 23.8% | 20.3% | CONVENIENT LOCATION | 18.1% |
| 73.7% | LARGER SELECTION | 63.8% | 56.0% | MAJOR DEPARTMENT STORES | 48.6% |
| 19.9% | BETTER QUALITY | 17.9% | 42.7% | PRODUCT NOT AVAILABLE | 28.1% |
| 15.5% | BETTER SERVICE | 14.7% | OTHER _____ | | |
| 26.9% | SAFE LOCATION | 38.2% | | | |

7 What types of businesses are most needed in Wyandotte County? (Circle up to five choices)

- | | | | |
|--|-------|-------------------------------|-------|
| 37.0% BUILDING MATERIALS AND GARDEN SUPPLIES | 8.9% | 26.6% FURNITURE | 21.8% |
| 12.8% HARDWARE | 9.7% | 21.0% HOUSEHOLD APPLIANCES | 13.8% |
| 4.6% AUTOMOBILES | 3.5% | 8.5% DRUG STORES | 11.7% |
| 2.6% AUTO PARTS | 4.1% | 30.5% FOOD (GROCERY, BAKERY) | 20.5% |
| 54.8% WOMEN'S CLOTHING | 59.4% | 74.1% RESTAURANTS | 64.0% |
| 39.7% MEN'S CLOTHING | 45.2% | 13.8% BOOKS / MUSIC | N/A |
| 26.2% CHILDREN'S CLOTHING | 27.5% | 48.9% MOVIES | N/A |
| 33.1% SHOES | 39.0% | 21.6% HOBBY / CRAFT | N/A |
| 8.5% JEWELRY | N/A | 7.9% CARD / GIFT SHOP | N/A |
| 9.5% SPORTING GOODS | 8.7% | 20.7% ELECTRONICS / COMPUTERS | 10.2% |

OTHER _____

8. Which retail business(es) do your household members feel are needed in Wyandotte County? Please list the names of the business(es) in the space provided below

9. Located adjacent to the NASCAR track is the 400 acre Tourism District, which will include stores such as Cabela's and Nebraska Furniture Mart. Other retail stores, a movie theater and restaurants are expected to be built within the next two years. How likely will your household be to shop at the Tourism District?

- 40.0% VERY LIKELY
- 23.7% SOMEWHAT LIKELY
- 5.8% SOMEWHAT UNLIKELY
- 18.2% VERY UNLIKELY
- 12.3% DON'T KNOW

The following questions are used for analysis only and individual responses will be kept confidential. The answers to these questions will aid in the analysis of the above retail questions. Please circle the number of the appropriate answer for each of the following questions.

10 How many years have you lived in Wyandotte County?

- 3.4% LESS THAN 1 YEAR
- 5.5% 1 TO 4 YEARS
- 7.6% 5 TO 9 YEARS
- 12.8% 10 TO 20 YEARS
- 70.7% OVER 20 YEARS

11 In which of the following do you live?

- 82.4% HOUSE THAT YOU OWN
- 8.0% HOUSE THAT YOU RENT
- 9.6% APARTMENT THAT YOU RENT
- OTHER _____

12 Which of the following best describes who lives in your household?

- 27.2% SINGLE ADULT, NO CHILDREN
- 15.3% SINGLE ADULT, WITH CHILDREN
- 28.6% MARRIED, NO CHILDREN
- 28.9% MARRIED, WITH CHILDREN
- OTHER _____

13 How many children/young adults are in your household between the following ages?
(Place number next to appropriate category(s).)

- | | | | | | |
|---------|---------|---------------------|---------|---------------------|---------------------|
| 1-58.3% | 2-33.3% | 3-8.3% (ages 0-5) | 1-73.5% | 2-26.5% (ages 6-11) | |
| 1-67.7% | 2-29.0% | 3-3.2% (ages 12-17) | 1-74.5% | 2-21.8% | 3-1.8% (ages 18-24) |

Note: Numbers in black preceding percentages are the count of children in that age group

14 What level of education have you completed?

- 2.5% LESS THAN HIGH SCHOOL
- 29.4% HIGH SCHOOL
- 43.6% SOME COLLEGE OR VOCATIONAL SCHOOL
- 24.5% COLLEGE BACHELORS DEGREE OR HIGHER

15. Are you?

- 74.7% FEMALE
- 25.3% MALE

16. What age group are you in?

- | | | | | | |
|-------|-------|-----------|-------|-------------------|-----------|
| 6.5% | 18-24 | YEARS OLD | 22.5% | 45-54 | YEARS OLD |
| 11.1% | 25-34 | YEARS OLD | 17.8% | 55-64 | YEARS OLD |
| 20.0% | 35-44 | YEARS OLD | 22.2% | 65 YEARS OR OLDER | |

17 Please indicate your racial or ethnic origin

- 69.6% WHITE
- 22.1% BLACK, AFRICAN AMERICAN
- .6% AMERICAN INDIAN OR ALASKA NATIVE
- 1.0% ASIAN OR PACIFIC ISLANDER
- 4.5% SPANISH / HISPANIC / LATINO
- 2.2% MULTI-RACIAL
- OTHER _____

18 What was your approximate household income from all sources, before taxes, in 2001?

- 25.1% LESS THAN \$25,000
- 43.2% \$25,000 TO \$49,999
- 20.8% \$50,000 TO \$74,999
- 10.9% \$75,000 OR MORE

If you are interested in receiving a summary of results, write "COPY OF RESULTS REQUESTED" on the back of the return envelope and print your name and address below it. DO NOT put your name and address on the questionnaire.

THANK YOU for taking the time to complete this survey. If you would like to make any additional comments, please do so below or on a separate sheet of paper.