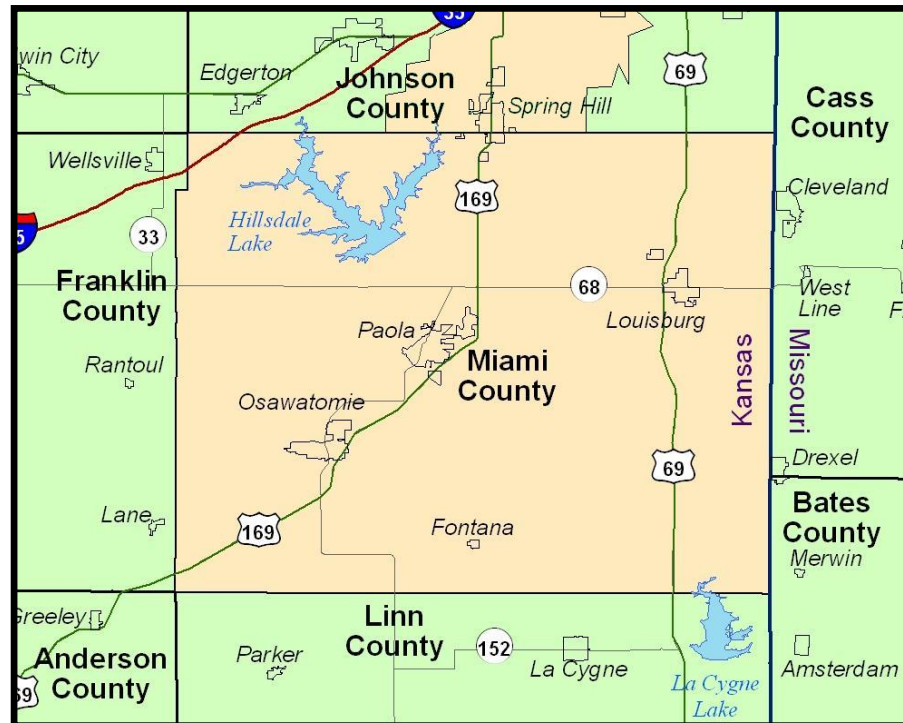


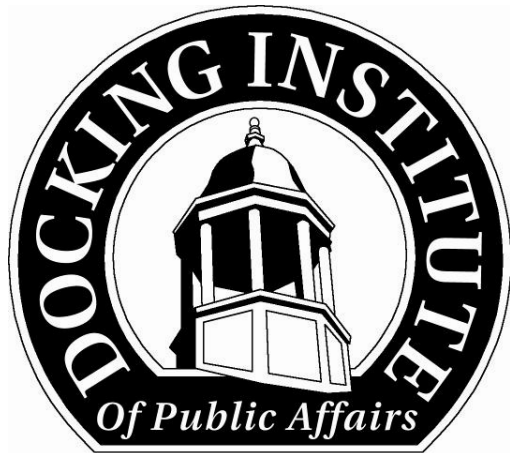
Miami County Resident Retail Shopping Survey



Prepared For
Miami County Economic Development

By

The Docking Institute of Public Affairs
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Fort Hays State University
600 Park Street
Hays, Kansas 67601-4099
Telephone: (785) 628-4197
FAX: (785) 628-4188
www.fhsu.edu/docking

Brett A. Zollinger, PhD
Director

Michael S. Walker, MS
Assistant Director

Jian Sun, PhD
Research Scientist

Leslie Paige, MS, EdS
Grants Facilitator

Joyce Wolfe, MS
Survey Center Manager

Laure Gross
Administrative Assistant

Mission:

To Facilitate Effective Public Policy Decision-Making.

The staff of the Docking Institute of Public Affairs and its University Center for Survey Research are dedicated to serving the people of Kansas and surrounding states.

Miami County Resident Retail Shopping Survey

Prepared By:

Jian Sun, PhD
Research Scientist,
Docking Institute of Public Affairs

Prepared For:

Miami County Economic Development

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Miami County Shopping Pattern Survey

Executive Summary

The Docking Institute of Public Affairs at Fort Hays State University conducted a telephone survey to investigate Miami County residents' shopping attitudes and behaviors. Two surveys were conducted. The primary survey of 449 residents in Miami County, Kansas was conducted from November 26 to December 11, 2007. A supplementary survey of 106 residents in Spring Hill¹ was conducted on February 12 and 13, 2008.

The Docking Institute's analysis finds:

- About 81% of respondents indicate that they purchase most of their food and groceries in Miami County.
- About 68% of the respondents who make most of their food and groceries purchases in Miami County indicate that they purchase 90-100% of food and groceries in Miami County.
- More than 33% of the respondents who buy most of their food and groceries outside of Miami County indicate that "lower price" is the most important reason for going out of the county.
- Less than half of respondents indicate that they purchase most of other items listed in the survey in Miami County, including automobiles, motorcycles, boats, clothing and shoes, TV's, computers, small appliances, home improvement supplies, and furniture and major household appliances.

- "More selection" is the leading reason for purchasing such items as clothing, shoes, automobiles, computers, furniture, and others listed in the survey.
- Overland Park and Olathe are most often cited as being visited by respondents who shop outside Miami County for the items listed in the survey, including food and grocery, clothing and shoes, automobiles, computers, and TVs.
- More than half (56.4%) of respondents purchased online last year.
- Paola is most often visited by respondents when they shop in Miami County. About 42% of the respondents indicate that they always shop at Paola when shopping in Miami County.
- About 86% of respondents strongly agree or agree that Miami County needs more shoes and clothing for adults in its stores.
- Home Depot is most often mentioned when respondents were asked what store they would like to see in Miami County.
- Fifty-one percent of respondents indicate that they purchase most of their routine medical care in Miami County.
- About 88% of respondents indicate that they always or sometimes eat at restaurants that are not fast food restaurants when they go out of town on shopping trips. Only 24.2% of respondents say they always or sometimes go to concert.
- About 45% of respondents indicate that they would like to hear about shopping opportunities through newspaper. Only 2.2% indicate that they would like to hear about it through local cable channel.

¹ Spring Hill is a community straddling Miami County and Johnson County lines. In this study, Spring Hill is viewed as a part of Miami County, that is, "Miami County" in the analysis refers to the area covering Miami County and Johnson County side of Spring Hill.

Research Objectives

The Docking Institute of Public Affairs at Fort Hays State University conducted a random digit dialed telephone survey for Miami County Economic Development. The survey was designed to assess retail shopping attitude and behavior of adults living in Miami County. It was agreed between Miami County Economic Development and the Docking Institute that the survey research would achieve the following objectives:

- Determine the extent and type of retail purchases in Miami by those who live in Miami County.
- Determine reasons for not shopping in Miami County among Miami County residents.
- Ascertain the types of products and establishments most desired for Miami County among the County residents.
- Determine out-of-county shopping-associated activities.
- Determine extent to which those who reside in but work outside Miami County make their purchases out of County as a matter of convenience and/or perceived cost savings.

Method

From November 26 to December 11, 2007, a primary survey was conducted on a randomly selected sample of households that was drawn from all the zip code areas within Miami County. A supplementary survey was conducted on February 12 and 13, 2008. A random sample of the households in the zip code area where Spring Hill² is located was drawn for the supplementary survey.

Within randomly selected households, adults (at least 18 years or older) with the most recent birthday were selected to maximize random selection of respondents within each household. In the primary survey, a total of 773 randomly selected adults were contacted with 449 interviews completed, resulting in a cooperation rate of 58%. In the supplementary survey, a total of 215 randomly selected adults were contacted with 106 interviews completed. The cooperation rate was 49%. Combining two surveys, the cooperation rate was 56% (555 out of 988). At a 95% confidence level, the margin of error for the full sample of 555 is 4.16%, assuming no response bias. A margin of error of 4.16% means that there is a 95% probability that findings among the sample vary no more than +/- 4.16% from the value that would be found if the full population of interest could be studied, assuming no response bias. In the field of telephone survey research, a cooperation rate of 56% and a margin

of error of 4.16% at a 95% confidence interval are considered acceptable to generalize to the larger population.

In our survey, 80.4% of respondents are residents living in Miami County (excluding Spring Hill), and 19.6% of respondents are residents of Spring Hill. These proportions are very close to those of the population (see Appendix 1). The weights shown in Appendix 1 were applied to the data, and analysis results were compared with the results obtained from unweighted data. The comparison shows no significant difference, so this report only presents the results obtained from unweighted data.

The data presented in this report provides a “snapshot” of the retail shopping patterns in Miami County, Kansas, and can provide an indication of the prevalence of shopping within Miami County and outside of Miami County by Miami County residents. The data presented here cannot provide an indication of the persistence of shopping inside and outside of the county. However, the data presented here can provide a baseline to compare to further similar retail shopping studies.

Appendix 2 reports distributions on demographic characteristics of the sample and, where possible, Miami County (excluding Johnson County side of Spring Hill) population parameters for the same demographic characteristics. The sample has higher percentages of female and middle-age and elderly people (45 years and older in age) than the overall population, but

² Spring Hill is a community straddling Miami County and Johnson County lines. In this study, Spring Hill is viewed as a part of Miami County, that is, “Miami County” in the analysis refers to the area covering Miami County and Johnson County side of Spring Hill.

most of the differences are close to the overall sample margin of error. For other social indicators, differences between the sample statistic and the population parameter are also within or very close to the overall sample margin of error. Appendix 3 reports in what

county respondents work. Out of the 311 respondents who answered the question, about 42% work in Miami County, and 46.3% work in Johnson County. Appendix 4 shows respondents' occupation information.

Findings from Survey

The survey started by inquiring about respondents' shopping behavior with regard to common household purchase, followed by questions asking about people's non-shopping activities on out-of-town shopping trips. Respondents were then asked about what types of goods and stores Miami County needs more of in order to improve people's shopping experience. Respondents were

Common Household Purchase

The first question in the survey asked respondents whether they make most of their common household purchases in Miami County. Figure 1 (next page) shows that among seven categories of common household goods, food and grocery is most often purchased in Miami County. About 81% (452 out of 555) of respondents indicate that they purchase most of their food and groceries in Miami County. Furniture and major household appliance are least often purchased in Miami County. Only 17.3% of respondents purchase most of them in Miami County.

For the respondents who make most of their common household purchases in Miami County, the survey asked them to

also asked about their online shopping activities and how they would like to hear about retail shopping opportunities. Lastly, the survey asked questions about respondents' demographic information. The findings of demographic information are presented in Appendices 2, 3, and 4. The main report presents the findings for other questions.

indicate the percentage of the goods that are purchased in Miami County. Figure 2 ranks the categories of goods by percentage of respondents who purchase 90-100% of each category. Food ranks the highest. About 68% of the respondents who make most of their food and groceries purchases in Miami County indicate that they purchase 90-100% of food and groceries in Miami County. Less than 41% of respondents who purchase most of their clothing and shoes in Miami County indicate that they purchase 90-100% of them in Miami County, which ranks the lowest.

Figure1: In- Versus Out-of-County Purchasing (N=555)

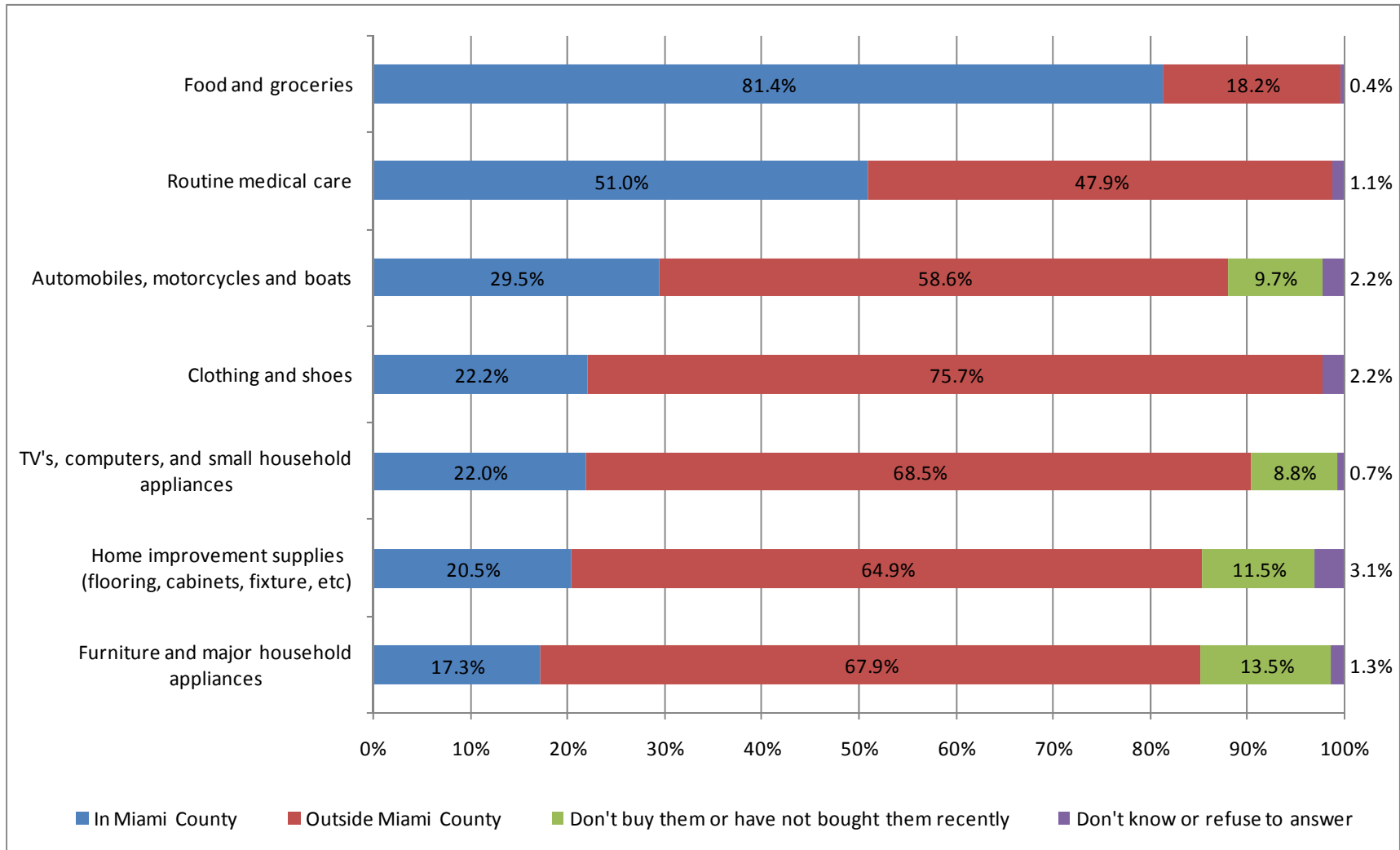
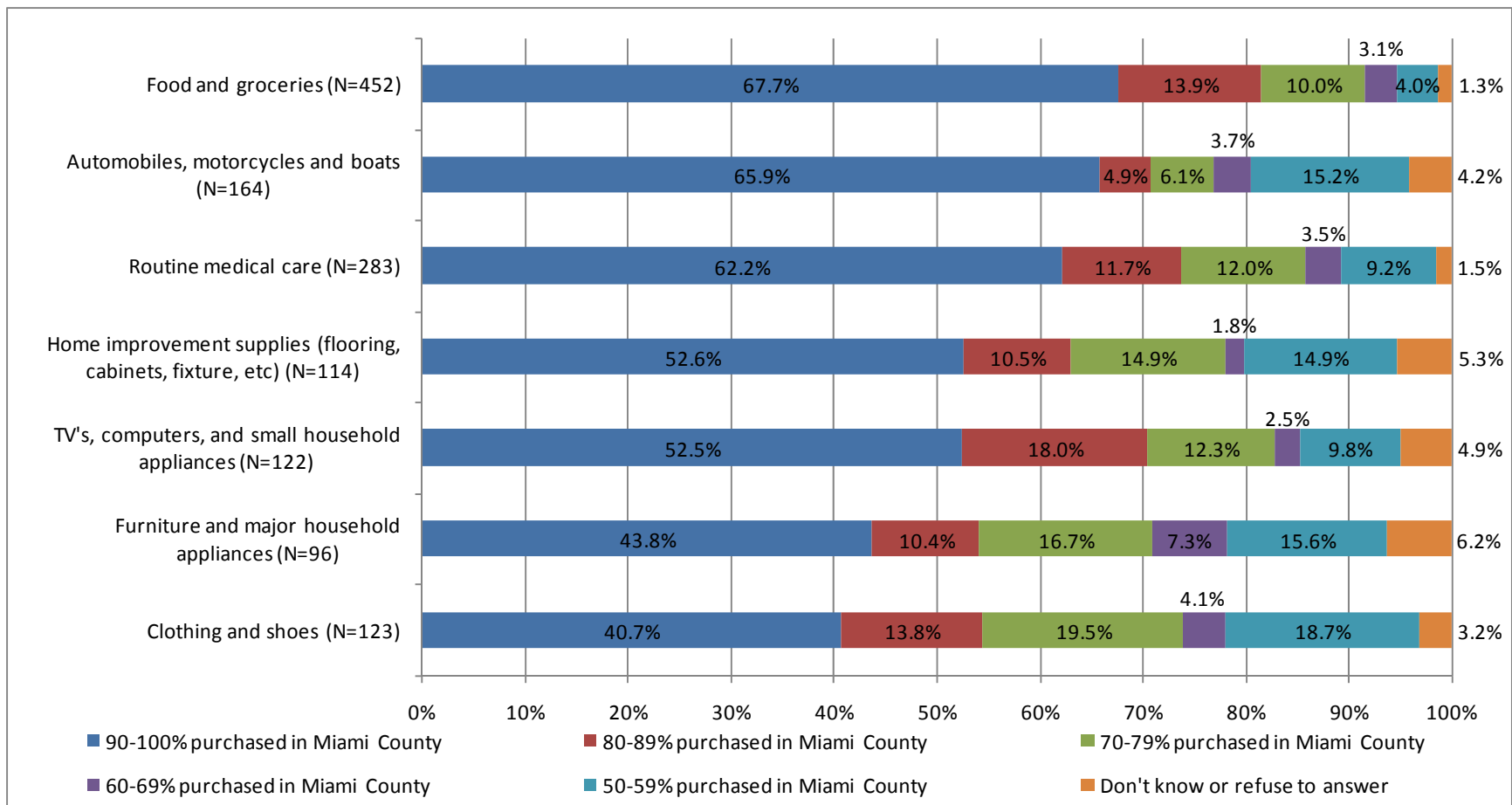


Figure 2: Percentage of Goods Purchased in Miami County Among Respondents Who Make Most of Their Purchases in Miami County



For the respondents who make most of their common household purchases outside Miami County, the survey asked them to indicate in which city they make most of their purchases. Appendix 5 shows the results. Although the survey asked respondents to provide city's name, respondents' answers sometimes represent locations other than a city. As shown in Appendix 5, Overland Park is most often visited by respondents who shop outside Miami County for food, clothing and shoes, TV's and small household appliances, and furniture and major household appliances. For instance, 37.7% of the respondents who shop outside Miami County for food indicate that they purchase most of the food and groceries in Overland Park. Olathe is most often visited by respondents who shop outside Miami County for automobiles, motorcycles, and boats, home improvement supplies, and routine medical care. Overland Park and Olathe are located in Johnson County, where 46.3% of survey respondents work (see Appendix 2).

The survey also asked the respondents who make most of their purchases outside Miami County to indicate the most important reason for their shopping outside of the county (see Table 1). "Lower price" is the leading reason for shopping outside of Miami for food and groceries. About 34% of respondents who buy

most of their food and groceries outside of Miami County indicate that "low price" is the most important reason for going out of the county. "More selection" is the leading reasons for shopping outside of Miami County for all other categories of goods.

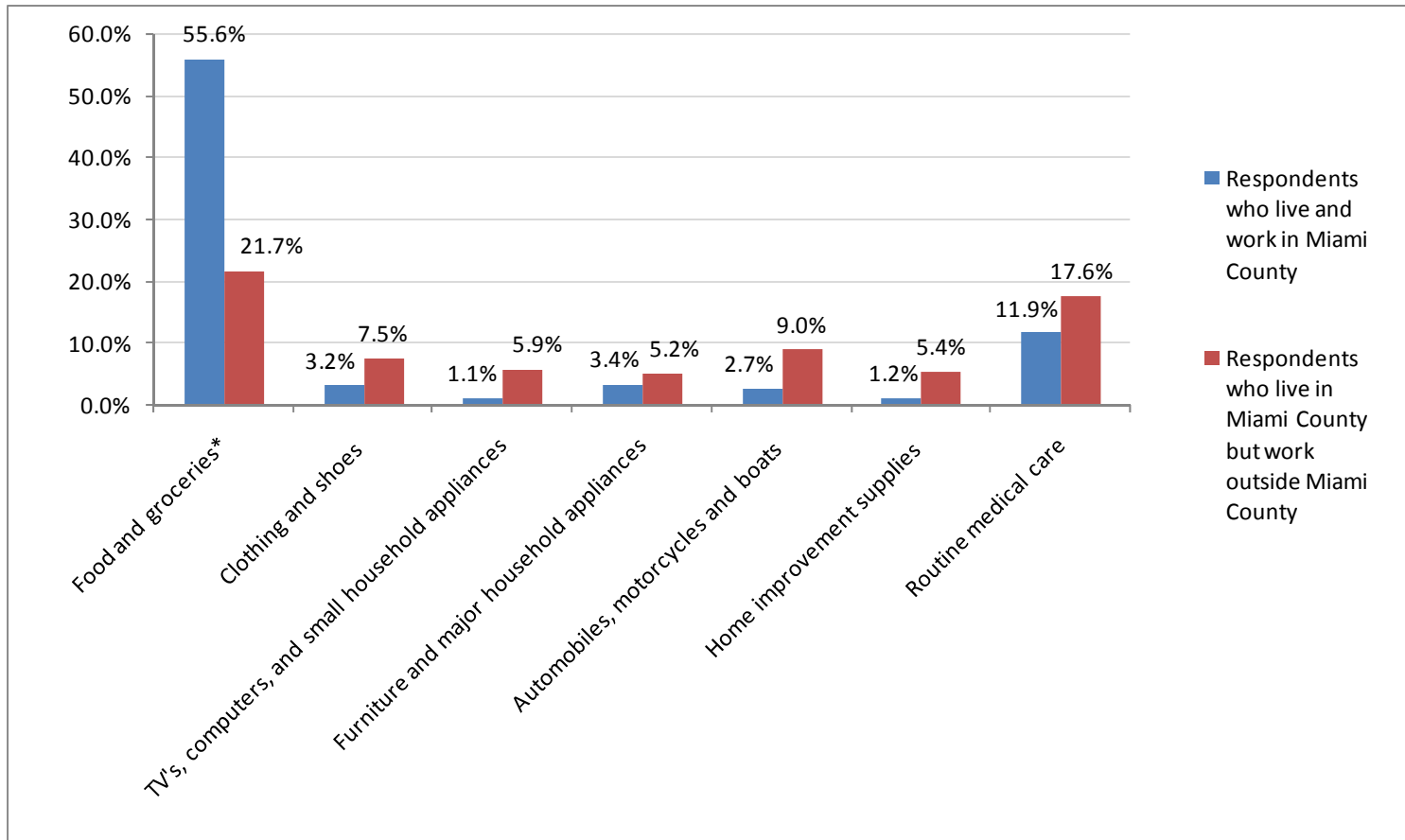
Working out of town provides people chances to shop out of town. Miami County residents who work outside Miami County may feel it more convenient to shop outside Miami County than those who work in Miami County. Figure 3 shows that this is true for shopping outside Miami County on all the items listed in the survey except food and groceries, and furniture and major household appliances. Compared with respondents who work in Miami County, higher percentages of respondents who work outside Miami County indicate that "convenience" is the most important reason for purchasing most of those items outside Miami County. Very high percent (55.6%) of those who live in Miami County and purchase most of their food and groceries outside Miami County indicate that "convenience" is the most important reason for purchasing most of food and groceries outside Miami County. The high percentage may not be representative of the population because the sample size of the sub-group is very small (N=9). The detailed sample size information can be found in Appendices 6 and 7.

Table 1: The Most Important Reason for Shopping Outside Miami County*

| | Lower price | More selection | Better quality | Longer store hours | Convenience | Getting hard to find items | Need to do other things in addition to shopping | Don't know or refuse to answer |
|--|--------------|----------------|----------------|--------------------|-------------|----------------------------|---|--------------------------------|
| Food and groceries (N=101) | 33.7% | 12.9% | 6.9% | 1.0% | 24.8% | 1.0% | 18.8% | 1.0% |
| Clothing and shoes (N=420) | 5.0% | 72.6% | 5.7% | 0.2% | 8.1% | 2.1% | 4.5% | 1.7% |
| TV's, computers, and small household appliances (N=380) | 12.9% | 71.6% | 3.7% | 1.1% | 5.8% | 1.3% | 1.8% | 1.9% |
| Furniture and major household appliances (N=377) | 13.8% | 69.2% | 5.6% | 0.5% | 5.6% | 2.6% | 1.3% | 1.1% |
| Automobiles, motorcycles and boats (N=325) | 21.2% | 58.8% | 2.5% | 0.0% | 8.3% | 2.5% | 0.9% | 5.8% |
| Home improvement supplies (flooring, cabinets, fixture, etc) (N=360) | 18.1% | 71.7% | 1.4% | 0.3% | 5.8% | 0.8% | 1.1% | 0.8% |
| Routine medical care (N=266) | 13.2% | 30.5% | 11.7% | 0.8% | 11.3% | 23.7% | 1.5% | 7.5% |

*The percentages shown in Table 1 are for **only those respondents** that indicated that they shop outside of Miami County for the item or items listed. The number in the first column (e.g., N=101) is the number of respondents who informed the interviewer that they “Shop Outside of Miami County” for that item or items. The overall survey sample included 555 respondents.

Figure 3: Convenience as the Most Important Reason for Shopping Outside Miami County

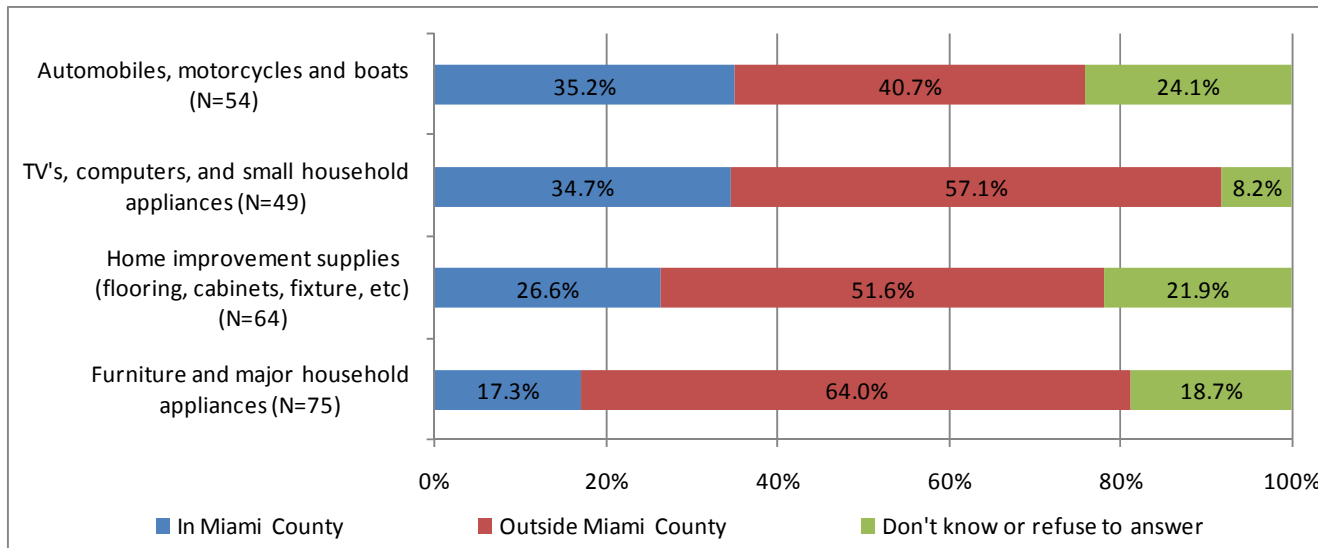


* That such a high percentage (55.6%) of respondents living and working in Miami County mention convenience as the most important reason for out-of-county shopping for food and groceries is likely a statistical oddity resulting from the very low number of respondents (9) living and working in county who tend to do most of their food and grocery shopping out of county.

The list of goods provided in the survey includes some large and expensive (big ticket) items, such as TV's, computers, furniture and major household appliances, automobiles, motorcycles and boats, and home improvement supplies. The survey provides an option to allow respondents to report not purchasing these big ticket items at all or recently. If a respondent reports not purchasing certain item at all or recently, the survey further asks him or her where he or she would shop if there is a need to

purchase such item. Figure 4 shows the answers. About 35% of the respondents who did not purchase automobiles, motorcycles and boats at all or recently indicate that they would buy those items in Miami County. Only 17.3% of the respondents who did not purchase furniture and major household appliances at all or recently indicate that they would purchase those items in Miami County.

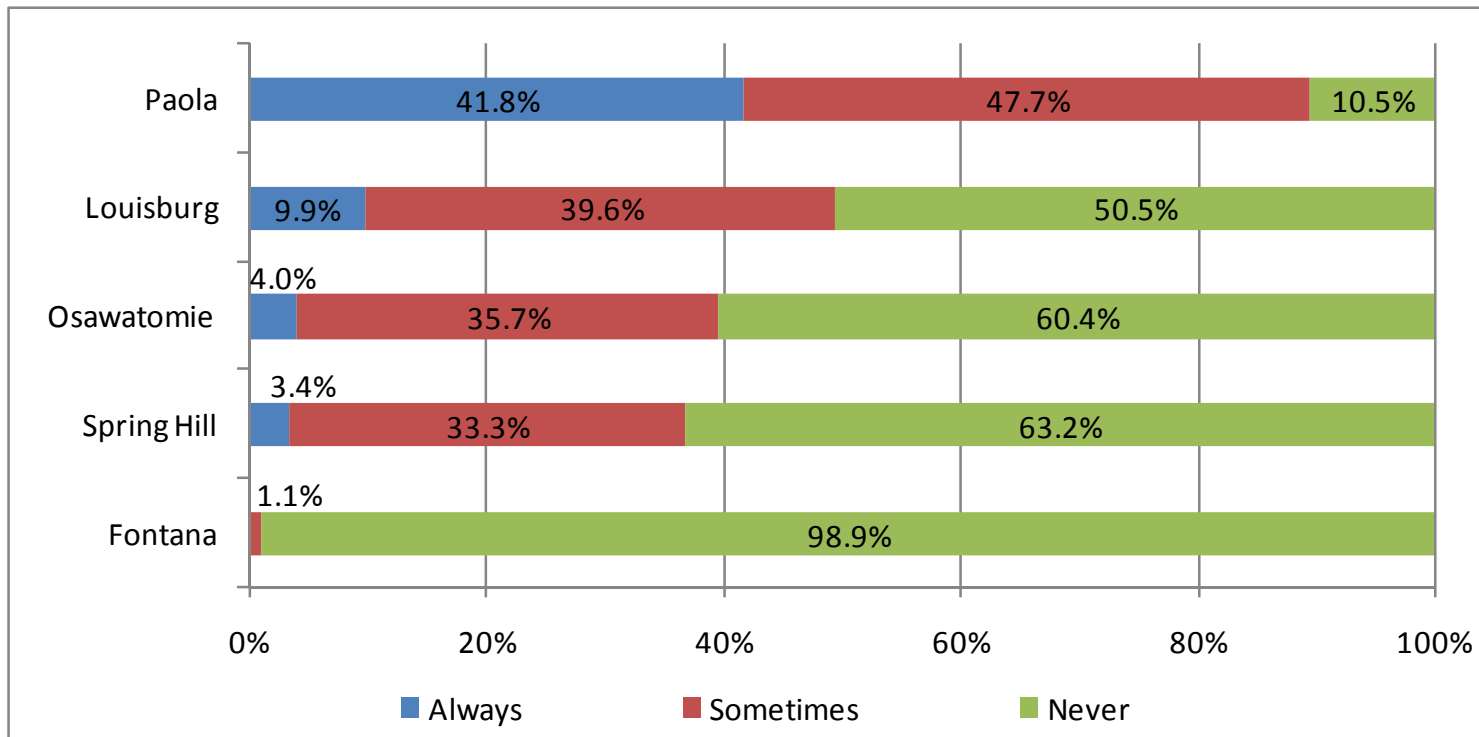
Figure 4: Likely In- Versus Out-of-County Purchasing Among Those Not-Making Big Ticket Purchases Recently



The survey also asked respondents in general how often they shop at different places when they shop in Miami County. About 42% of the respondents indicate that they always shop at

Paola when shopping in Miami County (see Figure 5). Only 10.5% of respondents indicate they never shop at Paola. In contrast, 98.9% of respondents report that they never shop at Fontana.

Figure 5: Tendency to Purchase in Particular Miami County Locations (N=555)

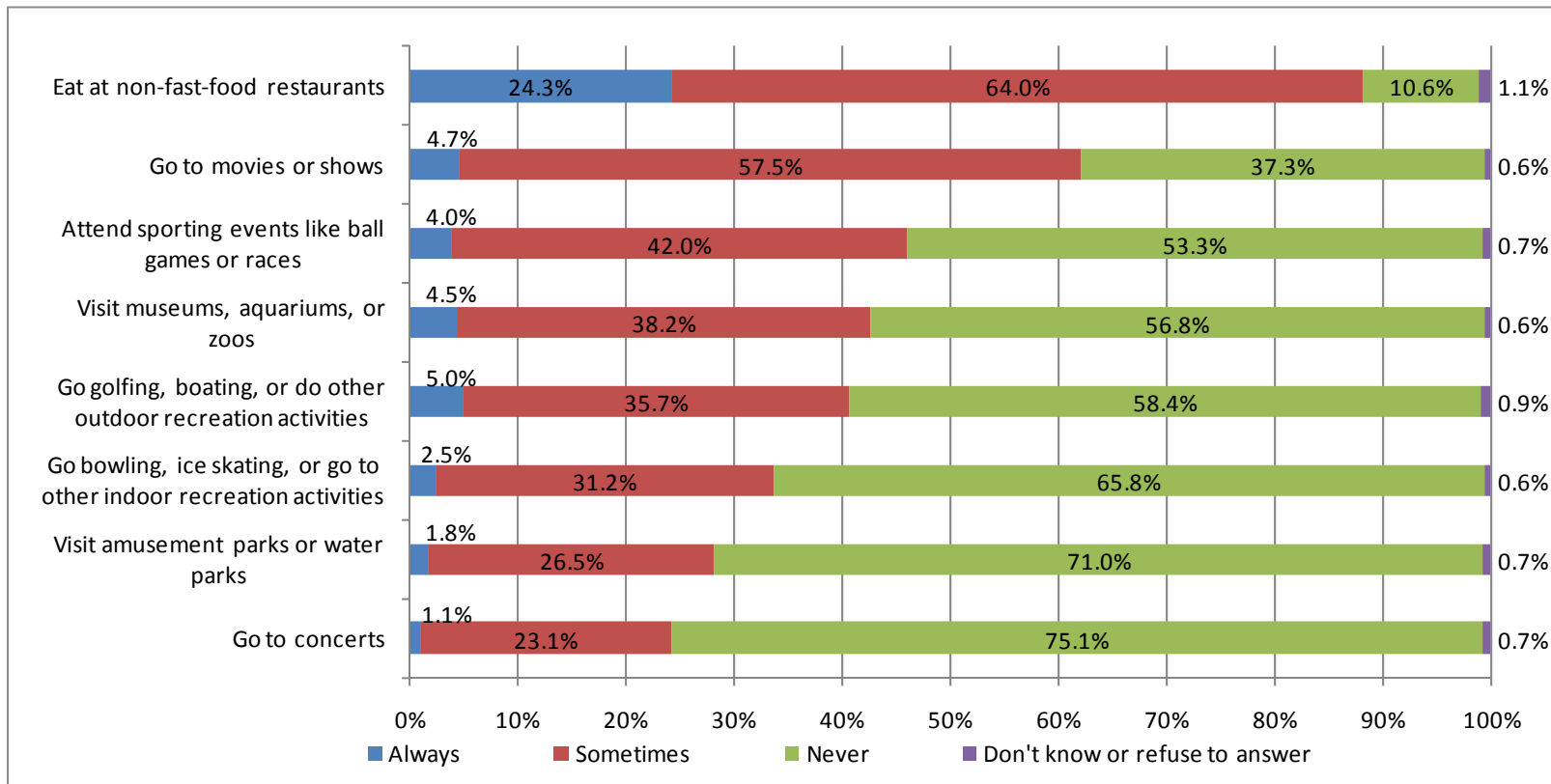


Non-Shopping Activities during Out-of-Town Shopping

People do things besides shopping when they go out of town on shopping trip. The survey asked respondents to report what non-shopping activities they do when they go out of town to shop. Figure 6 shows that 88.3% of respondents indicate that they

always or sometimes eat at restaurants that are not fast food restaurants when they go out of town on shopping trips. Only 24.2% of respondents say they always or sometimes go to concert.

Figure 6: Non-Shopping Activities on Out-of-Town Shopping Trips (N=555)



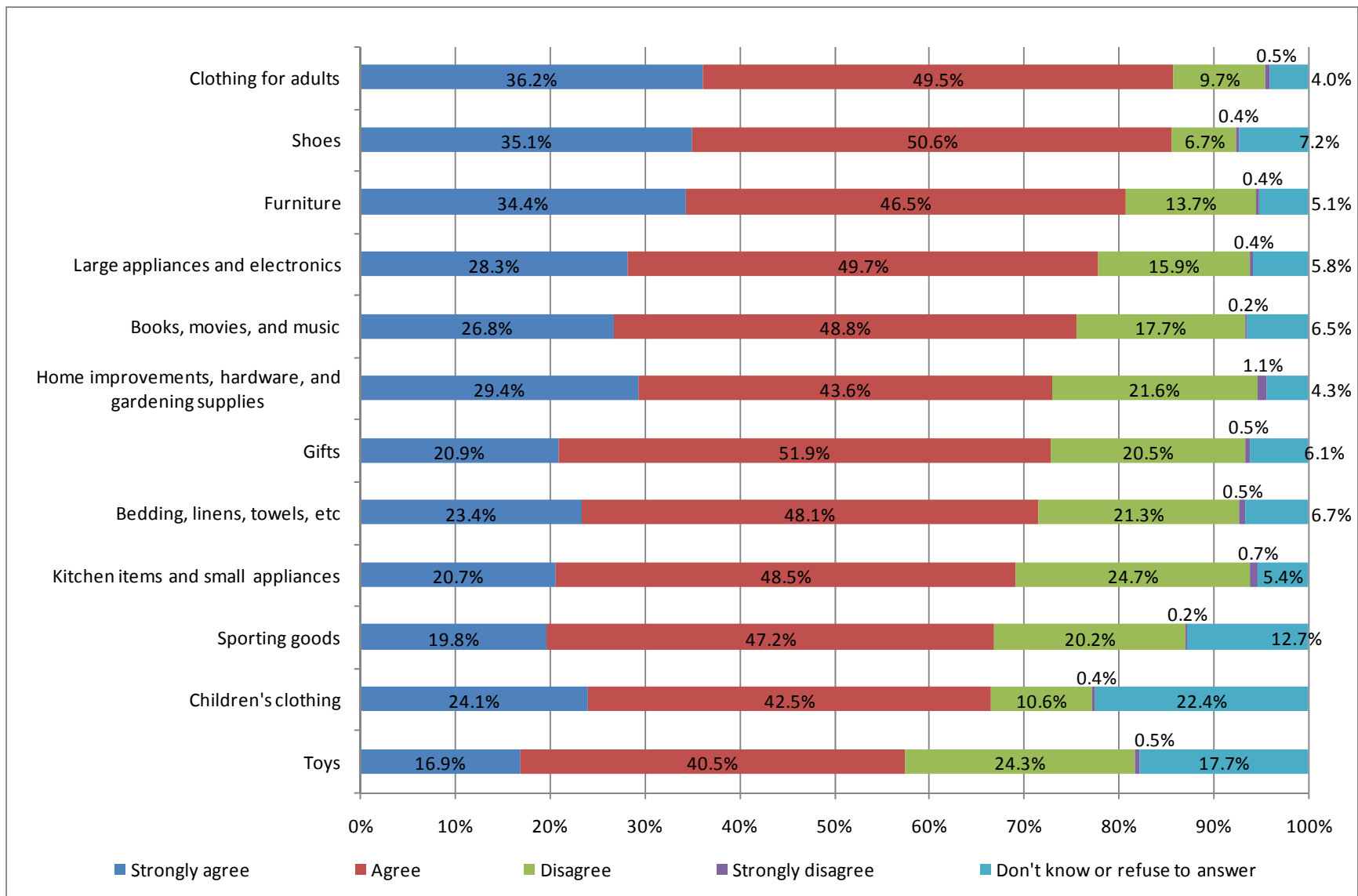
Goods Needed by Miami County

The survey listed 12 different types of goods and asks whether respondents agree that Miami County need more of those goods in its stores. Figure 7 ranks different types of goods by the percentage of people who strongly agree or agree that Miami County need more of such goods. Clothing for adults ranks the highest, closely followed by shoes. More than eighty percent of respondents strongly agree or agree that Miami County needs more clothing for adults (85.7%) and shoes (85.7%) in its stores. Toys rank the lowest, but still more than half (57.4%) of respondents strongly agree or agree that Miami County needs more toys in its stores.

The survey asked respondents to indicate if Miami County needs other items or goods that are not listed. Appendix 8 shows the results. Four percent of the respondents indicate that Miami County needs more restaurants besides those listed in the survey. The survey further asked respondents to specify three types of

stores they would like to see locate in Miami County. Respondents mention stores in general and also specific stores. Appendix 9 shows general stores and frequencies of respondents mentioning them. Appendix 10 shows the specific stores information. A clothing store is still most often mentioned among general stores, followed by a shoe store. Other often mentioned general stores include restaurant, furniture store, hardware store, department store, and so on. Home Depot is the most often mentioned among specific stores, followed by Target, Wal-Mart, Kohl's, Lowe's, Best Buy, and so on. Appendix 11 shows community differences in respondents' needs for the top five specific stores. About 44% of the respondents who would like to see Home Depot in Miami County are Paola residents. Fifty-six percent of respondents who would like to see Wal-Mart in Miami County are Spring Hill residents.

Figure 7: Goods Needed More in Miami County (N=555)

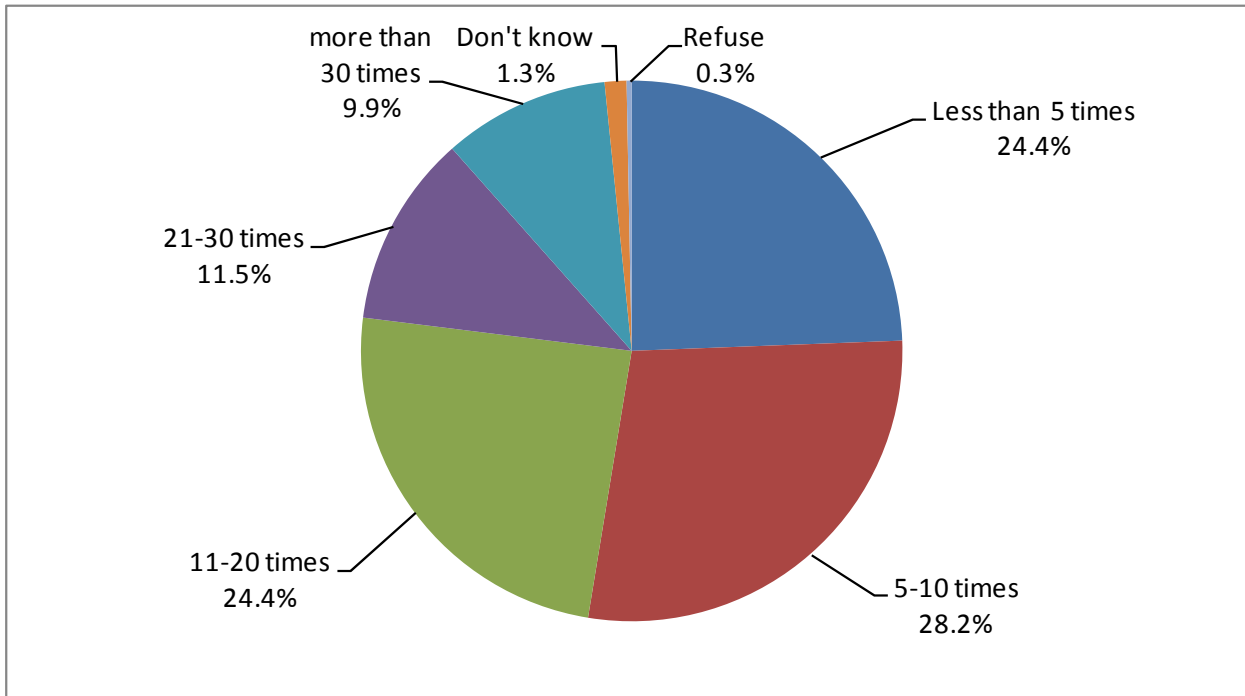


Online Shopping

The survey asked respondents whether they buy products online. Out of 553 respondents who answered the question, 312 (56.4%) of them say “Yes”. The survey continued to ask those who answer “Yes” about how many times last year they make online

purchases. Figure 8 shows that 9.9% of the respondents made over 30 online purchases last year. More than 24% indicate that they made less than 5 online purchases.

Figure 8: Frequency of Online Shopping in Last Year Among the 56% of Respondents Making Online Purchases (N=312)

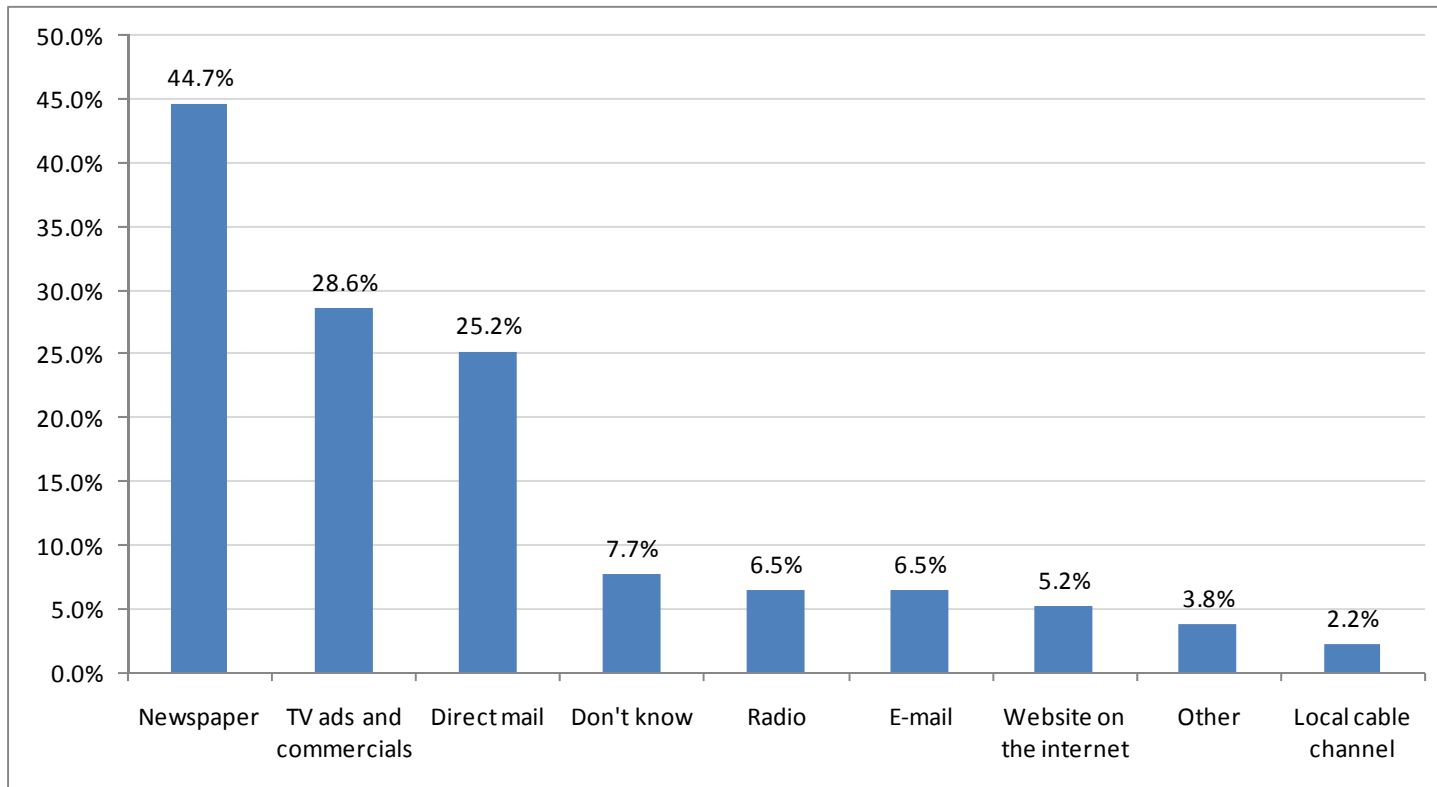


Advertising Mediums

Retailers use a variety of mediums to advertise their products. The survey provided a list of mediums and asks respondents through which medium they would like to hear about retail shopping opportunities. Figure 9 shows that newspaper is the leading medium through which respondents would like to hear about retail shopping opportunities. About 45% of the respondents

indicate that they would like to hear about shopping opportunities through newspaper. Only 2.2% indicate that they would like to hear about it through local cable channel. Twenty-one respondents provide some specific mediums other than those listed in the survey, which include catalog, flyer and magazine.

Figure 9: Advertising Mediums (N=555)



Appendix 1: Survey Samples

| | Population (2006 estimates) | Population Percentage | Sample | Sample Percentage | Weight |
|------------------------------------|------------------------------------|------------------------------|---------------|--------------------------|---------------|
| Miami County excluding Spring Hill | 28,209 | 77.7% | 446* | 80.4% | 0.97 |
| Spring Hill | 8,074 | 22.3% | 109* | 19.6% | 1.13 |
| Total | 36,283 | 100.0% | 555 | 100.0% | |

* The primary survey has three respondents living in Spring Hill.

Appendix 2: Demographic Characteristics of the Sample

| Social Indicators | | Survey Sample | Study Population (Miami County) |
|-------------------|---|--------------------|---------------------------------|
| Gender | Male | (N=553) 30.9% | 49.0% ^a |
| | Female | 69.1% | 51.0% ^a |
| Homeownership | Own a home | (N=542) 89.7% | 78.6% ^b |
| | Rent | 10.3% | 21.4% ^b |
| Hispanic Origin | | (N=555) 1.6% | 1.3% ^a |
| Race | White | (N=544) 97.4% | 97.3% ^a |
| | Black or African American | 0.7% | 1.6% ^a |
| | American Indian and Alaska Native alone | 0.6% | 0.5% ^a |
| | Asian | 0.2% | 0.2% ^a |
| | Native Hawaiian or Other Pacific Islander | 0.0% | 0.0% ^a |
| | Some other race | 1.1% | 0.4% ^a |
| Household Income | Less than \$10,000 | (N=456) 17.5% | 6.6% ^b |
| | \$10,000 to \$19,999 | 6.1% | 10.1% ^b |
| | \$20,000 to \$29,999 | 8.1% | 11.6% ^b |
| | \$30,000 to \$39,999 | 9.0% | 13.2% ^b |
| | \$40,000 to \$49,999 | 12.5% | 12.0% ^b |
| | \$50,000 to \$59,999 | 9.6% | 10.9% ^b |
| | \$60,000 to \$69,999 | 12.9% | Data not available |
| | \$70,000 to \$79,999 | 9.2% | Data not available |
| \$80,000 or more | 30.7% | Data not available | |

Appendix 2 (cont.): Demographic Characteristics of the Sample

| Social Indicators | | Survey Sample | Study Population (Miami County) |
|---|--|----------------|------------------------------------|
| Employment Status | | (N=544) | |
| | Working | 56.8% | 51.4% ^c |
| | Homemaker | 9.2% | Data not available |
| | Unemployed | 0.9% | 4.7% ^d |
| | Retired | 29.2% | 16.6% ^e |
| | Disabled | 3.9% | Data not available |
| Education | | (N=547) | |
| | Eighth grade or less | 1.3% | 4.1% ^f |
| | High school graduate | 28.0% | 36.7% ^f |
| | Associates/Technical/Vocational school | 8.6% | 7.0% ^f |
| | Some college | 23.2% | 25.5% ^f |
| | College graduate | 22.3% | 13.3% ^f |
| | Post college graduate | 11.3% | 4.9% ^f |
| Average Household Size | | (N=549) | |
| | Mean | 2.74 | 2.66 ^a |
| | Std. Deviation | 1.4 | Data not available |
| Years living in the Miami County and Spring Hill area | | (N=549) | |
| | Mean | 25.2 | Data not available |
| | Std. Deviation | 21.3 | Data not available |

Appendix 2 (cont.): Demographic Characteristics of the Sample

| Social Indicators | | Survey Sample | Study Population (Miami County) |
|-----------------------------|--------------------|-------------------|------------------------------------|
| | | (N=541) | |
| Age (of those 18 and older) | 18 to 24 years old | 1.7% | 10.1% ^a |
| | 25 to 29 years old | 3.9% | 7.2% ^a |
| | 30 to 34 years old | 6.8% | 9.4% ^a |
| | 35 to 39 years old | 5.9% | 12.2% ^a |
| | 40 to 44 years old | 9.2% | 12.5% ^a |
| | 45 to 49 years old | 12.9% | 10.7% ^a |
| | 50 to 54 years old | 11.5% | 8.6% ^a |
| | 55 to 59 years old | 9.8% | 7.2% ^a |
| | 60 to 64 years old | 9.6% | 5.6% ^a |
| | 65 to 69 years old | 9.8% | 4.7% ^a |
| | 70 to 74 years old | 6.7% | 4.1% ^a |
| | 75 to 79 years old | 6.8% | 3.1% ^a |
| 80 years old and over | 5.4% | 4.7% ^a | |

^a Source: U.S. Census Bureau (<http://factfinder.census.gov>). This is the information in 2000. This figures represents individuals that are 18 years of age or older.

^b Source: U.S. Census Bureau (<http://factfinder.census.gov>). This is the information in 2000.

^c Source: U.S. Bureau of Labor Statistics (<http://bls.gov>). This is the information in 2006.

^d Source: U.S. Bureau of Labor Statistics (<http://bls.gov>). The figure represents the official unemployment rate for Ellsworth County in 2006.

^e Source: U.S. Census Bureau (<http://factfinder.census.gov>). This is the information in 2000. This figure represents those individuals that are age 65 or older, and is used only as a rough estimate for retired individuals.

^f Source: U.S. Census Bureau (<http://factfinder.census.gov>). This is the information in 2000. This figure represents individuals that are 25 years of age or older.

Appendix 3: County of Work Among Miami County Residents (N=311)

| County | Percent |
|--|----------------|
| Anderson County | 0.3% |
| Cass County, MO | 0.6% |
| Franklin County, KS | 1.0% |
| Jackson County, KS | 2.3% |
| Jackson County, MO | 1.9% |
| Johnson County, KS | 46.3% |
| Linn County, KS | 0.6% |
| Miami County, KS | 41.8% |
| Pottawatomie County, KS | 0.3% |
| Shawnee County, KS | 0.3% |
| Wyandotte County, KS | 2.9% |
| Multiple counties in Kansas City Metropolitan Area | 1.0% |
| Don't know | 0.6% |

Appendix 4: Occupation (N=555)

| Job Category | Percent |
|--|----------------|
| General Labor | |
| General Labor/Cleaning/Delivery | 2.3% |
| Farm/Ranch Labor | 0.7% |
| Maintenance/Factory Work | 2.7% |
| Trucking/Heavy Equipment Operator/Other Blue Collar | 2.0% |
| Highly-Skilled Laobr | |
| Government Service/Protective Service | 2.2% |
| Technician/Mechanic | 3.4% |
| Service Sector | |
| Customer Service/Receptionist/Food Service | 7.9% |
| Clerical/Secretarial | 2.7% |
| Social Service/Para-Professional/Nursing | 5.9% |
| Office Manager/Small Business Owner/Other White Collar | 5.2% |
| Professional | |
| Government and Business Professional/Sales | 8.6% |
| Educator/Counselor/Doctor/Attorney | 9.5% |
| Non-Employed | |
| Homemakers | 0.7% |
| Unemployed | 0.2% |
| Don't Know or Refuse to Answer | 45.7% |

Appendix 5: Location of Purchases Outside Miami County

| | Food (N=101) | Clothing and shoes (N=420) | TV's, computers, and small household appliances (N=380) | Furniture and major household appliances (N=377) | Automobiles, motorcycles and boats (N=325) | Home improvement supplies (flooring, cabinets, fixture, etc) (N=360) | Routine medical care (N=266) |
|-------------------|---------------------|-----------------------------------|--|---|---|---|-------------------------------------|
| City | | | | | | | |
| Atchison | | | | | 0.3% | | |
| Belton | | | | | | 0.3% | |
| Cheney | | | | | 0.3% | | |
| Chicago | | | | | | | 0.4% |
| Clarinda, Iowa | | | | | 0.3% | | |
| Dodge City | | | | | 0.3% | | |
| Drexel, MO | 1.0% | | | | | | |
| Emporia | | | | | 0.3% | | |
| Fort Scott | | | | | 0.6% | | |
| Gardner | 16.9% | 0.9% | 0.6% | | | | 0.8% |
| Garrison | | | | | 0.3% | | |
| Garnet | | | | 2.0% | 3.9% | 0.9% | |
| Gladstone | | | | | 0.3% | | |
| Harrisonville, MO | | | | | | 0.3% | 0.4% |
| Independence, MO | | | | | 0.6% | | |
| Kansas City, KS | 1.0% | 6.5% | 12.1% | 23.2% | 11.2% | 4.8% | 3.5% |
| Kansas City, MO | | 0.2% | | | 1.5% | 0.3% | 3.9% |
| Knobnoster, MO | 1.0% | | | | | | |
| Lansing | 1.0% | | | | 0.3% | | 0.4% |
| Lakin | | 0.2% | | | | | |
| Lawrence | | 0.2% | | | 0.6% | | 0.4% |
| Leavenworth | 2.0% | | | | | | 0.4% |
| Leawood | | 0.9% | | | | 0.6% | 0.8% |
| Lee's Summit, MO | | | | | 0.3% | | |

Appendix 5 (cont.): Location of Purchases Outside Miami County

| | Food (N=101) | Clothing and shoes (N=420) | TV's, computers, and small household appliances (N=380) | Furniture and major household appliances (N=377) | Automobiles, motorcycles and boats (N=325) | Home improvement supplies (flooring, cabinets, fixture, etc) (N=360) | Routine medical care (N=266) |
|--------------------------|--------------|----------------------------|---|--|--|--|------------------------------|
| City | | | | | | | |
| Lenexa | 1.0% | 0.2% | 0.5% | 0.6% | 0.6% | 0.6% | 1.6% |
| Lola | | | | 0.3% | | | |
| Louisburg | | 0.2% | | 0.3% | | | |
| Marion | | | | | 0.9% | 0.3% | |
| Martin | | | | | 0.3% | | |
| Marysville, MO | | | | | 0.3% | | |
| Mission | | | | | 0.3% | | |
| Olathe | 33.7% | 35.8% | 29.2% | 20.4% | 38.5% | 59.9% | 49.3% |
| Ottawa | | 0.6% | 0.3% | 2.4% | 1.8% | 0.6% | 0.4% |
| Overland Park | 37.7% | 45.1% | 46.8% | 40.0% | 20.5% | 29.0% | 30.9% |
| Ozarks, MO | | | | | 0.3% | | |
| Palm Springs, California | | 0.2% | | | | | |
| Paola | | | | | | | 0.4% |
| Pittsburg | | | | 0.3% | | | |
| Pleasanton | | | 0.3% | | | | |
| Roeland Park | | | | | | | |
| Shawnee | | 0.2% | | 0.3% | 3.3% | | 2.2% |
| Springfield, MO | | | | | 0.3% | | |
| St. Joseph, MO | | 0.2% | | | | | |
| Stanley | 1.0% | | | 0.3% | | | 0.8% |
| Stillwell | | | | | | | 0.4% |
| Topeka | | | | | 0.6% | | 0.4% |
| Wellsville | | | | | 0.3% | | 0.4% |
| West Plains, MO | | | | | 0.3% | | |
| Willow Springs, MO | | | | | 0.3% | | |

Appendix 5 (cont.): Location of Purchases Outside Miami County

| | Food (N=101) | Clothing and shoes (N=420) | TV's, computers, and small household appliances (N=380) | Furniture and major household appliances (N=377) | Automobiles, motorcycles and boats (N=325) | Home improvement supplies (flooring, cabinets, fixture, etc) (N=360) | Routine medical care (N=266) |
|--------------------------|--------------|----------------------------|---|--|--|--|------------------------------|
| County | | | | | | | |
| Anderson County | | | | 0.3% | | | |
| Franklin County | | | | | 0.3% | | |
| Jackson County | | 0.2% | | | | | 0.4% |
| Johnson County | 3.0% | 4.7% | 5.4% | 4.3% | 3.6% | 3.1% | 3.9% |
| Shawnee County | | | 0.3% | | 0.3% | | |
| Wyandotte County | | | | 1.1% | | | |
| Metropolitan Area | | | | | | | |
| Kansas City Metro Area | | 1.0% | 0.9% | 2.0% | 0.9% | 0.6% | |
| State | | | | | | | |
| Missouri | | | 0.3% | 0.3% | 0.3% | | |
| Nebraska | | | | 0.6% | 0.3% | | |
| Other | | | | | | | |
| Catalog | | 0.9% | | | | | |
| Mail Order | | 0.6% | 0.6% | | | | |
| Through Internet | | 2.1% | 2.5% | | | | |
| Don't Know | | | | | | | |
| | 1.0% | 1.9% | 1.6% | 4.5% | 4.9% | 1.4% | 1.5% |

Appendix 6: The Most Important Reason for Shopping Outside Miami County: Miami County Residents Who Work Inside Miami County*

| | Lower price | More selection | Better quality | Longer store hours | Convenience | Getting hard to find items | Need to do other things in addition to shopping | Don't know or refuse to answer |
|---|-------------|----------------|----------------|--------------------|----------------|----------------------------|---|--------------------------------|
| Food and groceries (N=9) | 22.2% | 11.1% | 0.0% | 0.0% | 55.6%** | 0.0% | 11.1% | 0.0% |
| Clothing and shoes (N=93) | 5.4% | 80.6% | 4.3% | 0.0% | 3.2% | 1.1% | 3.2% | 2.2% |
| TV's, computers, and small household appliances (N=90) | 14.4% | 74.4% | 4.4% | 0.0% | 1.1% | 1.1% | 1.1% | 3.3% |
| Furniture and major household appliances (N=89) | 13.5% | 76.4% | 5.6% | 1.1% | 3.4% | 0.0% | 0.0% | 0.0% |
| Automobiles, motorcycles and boats (N=73) | 31.5% | 52.1% | 2.7% | 0.0% | 2.7% | 0.0% | 1.4% | 9.6% |
| Home improvement supplies (flooring, cabinets, fixture, etc) (N=83) | 24.1% | 71.1% | 0.0% | 0.0% | 1.2% | 1.2% | 0.0% | 2.4% |
| Routine medical care (N=42) | 11.9% | 31.0% | 14.3% | 0.0% | 11.9% | 23.8% | 0.0% | 7.1% |

* The percentages shown in Appendix 6 are for **only those respondents** that indicated that they shop outside of Miami County for the item or items listed **and** that they work inside of Miami County. The number in the first column (e.g., N=9) is the number of respondents who informed the interviewer that they “Shop Outside of Miami County” for that item or items **and** that later indicated that they work inside of Miami County.

** That such a high percentage (55.6%) of respondents living and working in Miami County mention convenience as the most important reason for out-of-county shopping for food and groceries is likely a statistical oddity resulting from the very low number of respondents (9) living and working in county who tend to do most of their food and grocery shopping out of county.

Appendix 7: The Most Important Reason for Shopping Outside Miami County: Miami County Residents Who Work Outside Miami County*

| | Lower price | More selection | Better quality | Longer store hours | Convenience | Getting hard to find items | Need to do other things in addition to shopping | Don't know or refuse to answer |
|---|--------------|----------------|----------------|--------------------|-------------|----------------------------|---|--------------------------------|
| Food and groceries (N=23) | 30.4% | 17.4% | 8.7% | 0.0% | 21.7% | 0.0% | 17.4% | 4.3% |
| Clothing and shoes (N=107) | 7.5% | 70.1% | 8.4% | 0.9% | 7.5% | 1.9% | 1.9% | 1.9% |
| TV's, computers, and small household appliances (N=102) | 15.7% | 67.6% | 3.9% | 2.0% | 5.9% | 2.0% | 2.0% | 1.0% |
| Furniture and major household appliances (N=96) | 14.6% | 68.8% | 5.2% | 1.0% | 5.2% | 3.1% | 2.1% | 0.0% |
| Automobiles, motorcycles and boats (N=78) | 19.2% | 64.1% | 0.0% | 0.0% | 9.0% | 2.6% | 0.0% | 5.1% |
| Home improvement supplies (flooring, cabinets, fixture, etc) (N=92) | 22.8% | 68.5% | 0.0% | 1.1% | 5.4% | 1.1% | 1.1% | 0.0% |
| Routine medical care (N=68) | 17.6% | 20.6% | 16.2% | 1.5% | 17.6% | 22.1% | 0.0% | 4.4% |

* The percentages shown in Appendix 6 are for **only those respondents** that indicated that they shop outside of Miami County for the item or items listed **and** that they work inside of Miami County. The number in the first column (e.g., N=9) is the number of respondents who informed the interviewer that they “Shop Outside of Miami County” for that item or items **and** that later indicated that they work inside of Miami County.

Appendix 8: Other Items, Goods, or Establishments Needed in Miami County (N=555)

| Items, goods, or stores | Percent | Items, goods, or stores | Percent |
|----------------------------------|----------------|---|----------------|
| Antique | 0.2% | Grocery | 2.2% |
| Automobile dealership | 0.2% | Handicap store | 0.2% |
| Baby items | 0.2% | In general, more stores with higher quality, more variety | 3.8% |
| Book store | 0.4% | Local businesses | 0.2% |
| Boots | 0.4% | Mall | 0.2% |
| Buffet | 0.2% | Office supplies | 0.4% |
| Building materials/lumber yard | 1.8% | Pet supplies | 0.5% |
| Cards/gifts/household decoration | 0.4% | Photo equipment | 0.4% |
| Children shoes | 0.2% | Plumbing | 0.2% |
| Christian book store | 0.2% | Power tools | 0.2% |
| Clothing | 2.0% | Restaurant | 4.0% |
| Coffee shop | 0.2% | Retail outlet | 0.2% |
| Electronics | 0.4% | Scrap booking | 0.2% |
| Entertainment | 0.4% | Sewing | 0.2% |
| Fabric and craft items | 1.4% | Shoes | 0.5% |
| Family friendly | 0.4% | Tire | 0.4% |
| Feed and livestock supplies | 0.5% | Tractor | 0.2% |
| Fishing gear | 0.2% | Vets | 0.2% |
| Food products | 1.3% | Weapon | 0.2% |
| Furniture | 0.5% | Don't know or refuse to answer | 74.8% |

Appendix 9: Establishments Respondents Would Like to See in Miami County: General Stores

| Store | Frequency | Store | Frequency | Store | Frequency |
|------------------------|------------|---------------------------|-----------|----------------------------|-----------|
| Amusement | 1 | Fabric store | 2 | Office supply store | 3 |
| Antique store | 1 | Family store | 1 | Outdoors store | 1 |
| Apparel store | 1 | Farm store | 2 | Outlet store | 2 |
| Appliance store | 14 | Fishing store | 2 | Pet store | 3 |
| Arcade | 1 | Fitness center | 3 | Restaurant | 43 |
| Art's and crafts store | 5 | Furniture | 41 | Restaurant (not fast food) | 19 |
| Auto maintenance | 1 | Gardening store | 3 | Retail store | 3 |
| Baby store | 1 | General merchandise store | 2 | Scrapbooking store | 3 |
| Bait shop | 1 | General stores | 1 | Sewing/quilt shop | 1 |
| Beauty salon | 1 | Gift shops | 4 | Shoe store | 54 |
| Boat repair store | 1 | Grocery store | 31 | Skating rink | 2 |
| Bookstore | 29 | Handicap store | 1 | Specialty store | 2 |
| Bowling | 5 | Hardware store | 34 | Sports store | 32 |
| Children store | 7 | Health food store | 1 | Technology store | 1 |
| Clothing store | 101 | Home furnishing | 1 | Thrift store | 1 |
| Coffee shop | 3 | Home improvement | 32 | Tire store | 1 |
| Container store | 1 | Housewares | 2 | Tool store | 1 |
| Department store | 34 | Hunting store | 2 | Toy store | 3 |
| Discount store | 6 | Ice cream parlor | 3 | Variety store | 9 |
| Doctor's office | 1 | Kids activities | 2 | Western store | 4 |
| Dollar store | 3 | Mall | 7 | Zoo | 1 |
| Dress store | 5 | Mens store | 1 | | |
| Drug store | 4 | Mom and pop store | 2 | | |
| Electronic store | 12 | Movie theatre | 19 | | |
| Entertainment | 5 | Music store | 6 | | |

Appendix 10: Establishments Respondents Would Like to See in Miami County: Specific Stores

| Store | Frequency | Store | Frequency | Store | Frequency | Store | Frequency |
|---------------------|-----------|-----------------------|-----------|---------------------------|-----------|-----------------------|-----------|
| Abercrombie | 3 | COSTCO | 3 | IHOP | 1 | Quiznos | 1 |
| Ace Hardware | 2 | Cummings | 1 | JC Penney | 13 | Radio Shack | 1 |
| Aeropostale | 1 | Daltons | 1 | Jones | 2 | Red Wing Boots | 1 |
| Alco | 2 | Dick's Sporting Goods | 6 | K Mart | 16 | Sam's Club | 6 |
| Aldi's | 9 | Dillard's | 3 | Kentucky Fried Chicken | 1 | Sears | 18 |
| Applebee's | 7 | Dillon's | 1 | Kohl's | 49 | Shoe Carnival | 2 |
| Arbies | 1 | Discount Clothing | 1 | Linens and Things | 1 | Sirloin Stockade | 1 |
| Armani | 1 | Dollar Tree | 2 | Long John Silvers | 8 | Starbucks | 6 |
| ATV Parts | 1 | Dress Barn | 2 | Longhorn | 1 | Steak and Shake | 1 |
| Barns and Nobble | 3 | DSW Shoe Store | 1 | Lowe's | 35 | Steven Berry's | 1 |
| Baskin Robins | 1 | Famous Footwear | 1 | Lumber Yard | 4 | Taco Bell | 2 |
| Bass Pro | 1 | Farm and Home | 1 | Macy's | 5 | Target | 77 |
| Bath and Body works | 2 | Fashion Bug | 1 | Marshalls | 3 | T J Maxx | 1 |
| Bed Bath and Beyond | 4 | Game Place | 1 | Maurices | 1 | Toys'r'us | 1 |
| Best Buy | 25 | Gap | 1 | McDonalds | 6 | Tractor Supply | 2 |
| Borders | 11 | Garden Nursery | 2 | Nebraska Furniture | 4 | Trader Joes | 1 |
| Buckle | 1 | Golf Galaxy | 1 | Office Depot | 1 | Walgreens | 6 |
| Burger King | 1 | Gordmans | 1 | Old Navy | 8 | Walmart | 50 |
| Cabellas | 1 | Hallmark | 4 | Orchelins | 1 | Wendy's | 2 |
| Carters for Kids | 1 | Harbor Freight | 1 | Outback Steakhouse | 2 | Whole Sale Grocery | 3 |
| Chili's | 1 | Hen House | 2 | Payless Shoes | 10 | | |
| Christian Bookstore | 5 | Hy Vee | 2 | Perkins | 2 | | |
| Circuit City | 2 | Hobby Lobby | 6 | Plus Women | 1 | | |
| Coldwater Creek | 1 | Hollister | 1 | Quick Change Oil | 1 | | |
| Comp USA | 1 | Home Depot | 89 | QuickTrip | 4 | | |

Appendix 11: Top Five Specific Stores Respondents Would Like to See in Miami County

| City | Zip Code | Home Depot (N=89) | Target (N=77) | Wal-Mart (N=50) | Kohl's (N=49) | Lowe's (N=35) |
|--------------|-----------------|------------------------------|--------------------------|----------------------------|--------------------------|--------------------------|
| Bucyrus | 66013 | 2.2% | 3.9% | 4.0% | 2.0% | 2.9% |
| Fontana | 66026 | 3.4% | 2.6% | 2.0% | 2.0% | 2.9% |
| Louisburg | 66053 | 19.1% | 27.3% | 28.0% | 30.6% | 20.0% |
| Osawatomie | 66064 | 19.1% | 16.9% | 6.0% | 12.2% | 17.1% |
| Paola | 66071 | 43.8% | 31.2% | 4.0% | 49.0% | 48.6% |
| Spring Hill | 66083 | 12.4% | 18.2% | 56.0% | 4.1% | 8.6% |
| Total | | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Appendix 12: Telephone Survey Instrument

Miami Shopping Survey

Q: QINTRO

Hi. I'm calling from Fort Hays State University. We're asking residents of Miami County a few questions about household shopping patterns. I need to speak with an adult member of the household at least 18 years or older. May I speak with you?

[IF THEY SAY NO ASK IF SOMEONE ELSE IN THE HOUSEHOLD CAN HELP]

[IF SOMEONE ELSE IS GIVEN THE PHONE, RE-READ INTRO ABOVE]

ENTER 1 TO CONTINUE CTRL END TO TERMINATE

Q: Q1

Your answers will remain completely confidential. First I am going to ask you where you tend to make common household purchases, and what factors are important for selecting the place of purchase. Do you buy most of your food and groceries in Miami County or outside Miami County?

- 1 In Miami County
- 2 Outside Miami County
- 8 DON'T KNOW
- 9 REFUSED

If in Miami County

Q:Q1a

About what percentage of your food and groceries would you say are purchased in Miami County? Is it....

- 1 90-100%
- 2 80-89%
- 3 70-79%
- 4 60-69%
- 5 50-59%

If outside Miami County

Q:Q1b

In what city do you purchase most of your food and groceries?

Q: Q1c

I am going to read a list of some typical reasons why someone might shop outside the county. Please tell us the most important reason why you shop outside the county for food and groceries. Is it because of...

- 1 Lower prices
- 2 More selection
- 3 Better quality
- 4 Longer store hours
- 5 Convenience (close to home, work, school, etc)
- 6 Getting hard to find items
- 7 Needing to do other things in addition to shopping (dry-cleaning, eating, movies, etc)

Repeat same steps for the following:

Clothing and shoes (Q2 series)

TV's, computers, and small household appliances (Q3 series)

Furniture and major household appliances (Q4 series)

Automobiles, motorcycles and boats (Q5 series)

Home improvement supplies like flooring, cabinets, fixtures, etc (Q6 series)

Routine medical care (Q7 series)

Q3d, Q4d, Q5d, Q6d

While all introductory questions in this series asked whether items were purchased within or outside Miami County (Q1, Q2, etc), some questions were changed to allow the recording of respondent nonpurchase of items. For the Q3, Q4, Q5 & Q6 series which describe larger and more expensive items, an option was added to the introductory question to allow respondent to report not purchasing these items at all or recently.

When this was reported, respondents were directed to Q3d, Q4d, Q5d, or Q6d (as appropriate) where they were asked "If you needed to purchase _____ for your home, where would you shop, in Miami county, or outside the county?"

Q: Q8a

Sometimes people do things besides shopping when they go out of town on shopping trips. When you go out of town to shop, would you say you always, sometimes or never do the following non-shopping activities.

Eat at restaurants that are not fast food restaurants

[NOT MCDONALDS, BURGER KING, PIZZA HUT, ETC]

1 Always

2 Sometimes

3 Never

8 DON'T KNOW

9 REFUSED

Q: Q8b Go to concerts

Q: Q8c Go to movies or shows

Q: Q8d Visit museums, aquariums, or zoos

Q: Q8e Visit amusement parks or water parks

Q: Q8f Attend sporting events like ball games or races

Q: Q8g Go bowling, ice skating, or go to other indoor recreation activities

Q: Q8h Going golfing, boating, or doing other outdoor recreation activities

Q: Q9a

When you shop in Miami County, do you always, sometimes, or never shop at Paola?

1 Always

2 Sometimes

3 Never

8 DON'T KNOW

9 REFUSED

Q: Q9b Spring Hill

Q: Q9c Louisburg

Q: Q9d Fontana

Q: Q9e Osawatomie

Q: Q10a

We are now going to ask your opinion about how to best improve the shopping experience in Miami County. Please tell me whether you strongly agree, agree, disagree, or strongly disagree that Miami County needs more of the following types of goods:

Shoes

1 Strongly Agree

2 Agree

3 Disagree

4 Strongly Disagree

8 DON'T KNOW

9 REFUSED

Q: Q10b Children's clothing

Q: Q10c Clothing for adults

Q: Q10d Bedding, linens, towels, etc

Q: Q10e Sporting goods

Q: Q10f Toys

Q: Q10g Home improvement, hardware, or gardening supplies

Q: Q10h Kitchen items and small appliances

Q: Q10i Large appliances and electronics

Q: Q10j Furniture

Q: Q10k Books, movies, and music

Q: Q10L Gifts

Q: Q10m Are there any other items or goods that Miami County needs more of in its stores?

Q: Q11a, Q11b, Q11c Name three specific types of stores you would like to see locate in Miami County.

Q: Q12a

Do you ever buy products on-line through web sites?

1 Yes

2 No

8 DON'T KNOW

9 REFUSED

Q: Q12b

About how many times last year do you make online purchases? This does not include purchasing for your business or home business. _____

[IF NOT SURE, ESTIMATE]

88 DON'T KNOW

99 REFUSED

Q: Q13

Retailers use a variety of mediums to advertise their products.

Television, newspaper, and radio ads are used, as well as internet sites, email, and direct mail.

How would YOU like to hear about retail shopping opportunities?

[DO NOT READ. CHOOSE ALL THAT APPLY]

TV ads and commercials

Local cable channel [FOR EXAMPLE: OUR CHANNELS __]

Newspaper

Radio

Website on the internet

E-mail

Direct Mail

Other _____

DON'T KNOW

REFUSED

What is local cable
channel #?

Q: Q14

And finally, we have some questions about yourself to help us analyze the results of the survey. How many years have you lived in your community?

Q: Q15

Do you own your home outright, pay a monthly mortgage payment, or rent your home?

1 Own home

2 Mortgage payments

3 Rent

8 DON'T KNOW

9 REFUSED

Q: Q16a Are you currently working, a homemaker, retired, disabled, or unemployed or laid off?

If working

Q: Q16b What is your occupation?

Q:Q16c In what county do you work?

Q: Q17 For the past year, how many people lived in your household at least half of the year? _____

88 DON'T KNOW

99 REFUSED

Q: Q18

What is the highest level of education you have completed?

[FIT ANSWER]

1 Eighth grade or less

2 Some high school

3 High school graduate

4 Vocational school

5 Some college

6 College graduate (Bachelors)

7 Post college graduate (Anything more than bachelors)

8 DON'T KNOW

9 REFUSED

Q: Q19

What year were you born? _____

8888 DON'T KNOW

9999 REFUSED

Q: Q20

Are you of Mexican or some other Hispanic origin?

1 Yes

2 No

8 DON'T KNOW

9 REFUSED

Q: Q21

Do you consider yourself:

1 White

2 Black or African American

3 Biracial

4 American Indian or Alaskan Native

5 Asian

6 Native Hawaiian or Other Pacific Islander

7 Some other race

8 DON'T KNOW

9 REFUSED

Q: Q22

Was your total family income for the last year above
or below \$40,000?

[IF BELOW \$40,000, READ THE FOLLOWING RESPONSES]

1 Was it less than \$10,000,

2 Between \$10,000 and \$20,000,

3 Between \$20,000 and \$30,000?

4 Or was it between \$30,000 and \$40,000?

[IF ABOVE \$40,000, READ THE FOLLOWING RESPONSES]

5 Was it between \$40,000 and \$50,000,

6 Between \$50,000 and \$60,000,

7 Between \$60,000 and \$70,000,

8 Between \$70,000 and \$80,000

9 Or was it over \$80,000

88 DON'T KNOW

99 REFUSED

Q: Q23

What is your zip code? _____ IF NEEDED, EXPLAIN ZIP CODE:

"WHAT IS THE FIVE DIGIT NUMBER YOU PUT AFTER THE STATE ABBREVIATION WHEN YOU SEND A LETTER?"

88888 DON'T KNOW

99999 REFUSED

Q: Q24

And finally, is it okay for my supervisor to call and confirm your participation in this survey?

1 Yes

2 No

8 DON'T KNOW

9 REFUSED

Q: Q25

Okay, that's all the questions I have. Thank you very much for your participation.

WAS THE RESPONDENT A

1 Male

2 Female

8 Don't know

Q: Q26 What is your station number?

Q: Q27 What time of day was this survey completed?

- 1 Morning
- 2 Afternoon
- 3 Evening