
DOWNTOWN AUSTIN ALLIANCE

**DOWNTOWN RETAIL DEMAND STUDY
SELECTED FINDINGS**

**M. Crane & Associates, Inc.
June 2004**

BACKGROUND INFORMATION

PROFILE OF RESPONDENTS:

- 400 telephone interviews were conducted in April with households in areas near downtown Austin (78701, 78703, 78704, 78705, 78731, 78746, 78751, 78756, 78757)
- Respondent Gender
 - Just over half (54%) are female; 46% are male.
- Respondent Age
 - One third (32%) are between 18 and 34. One third (32%) are between 35 and 44. One third (36%) are 45 or older.
- Respondent Education
 - 45% of respondents had a college degree or more education
- Place of Employment
 - In one third (32.5%) of households, at least one person works in the downtown area.

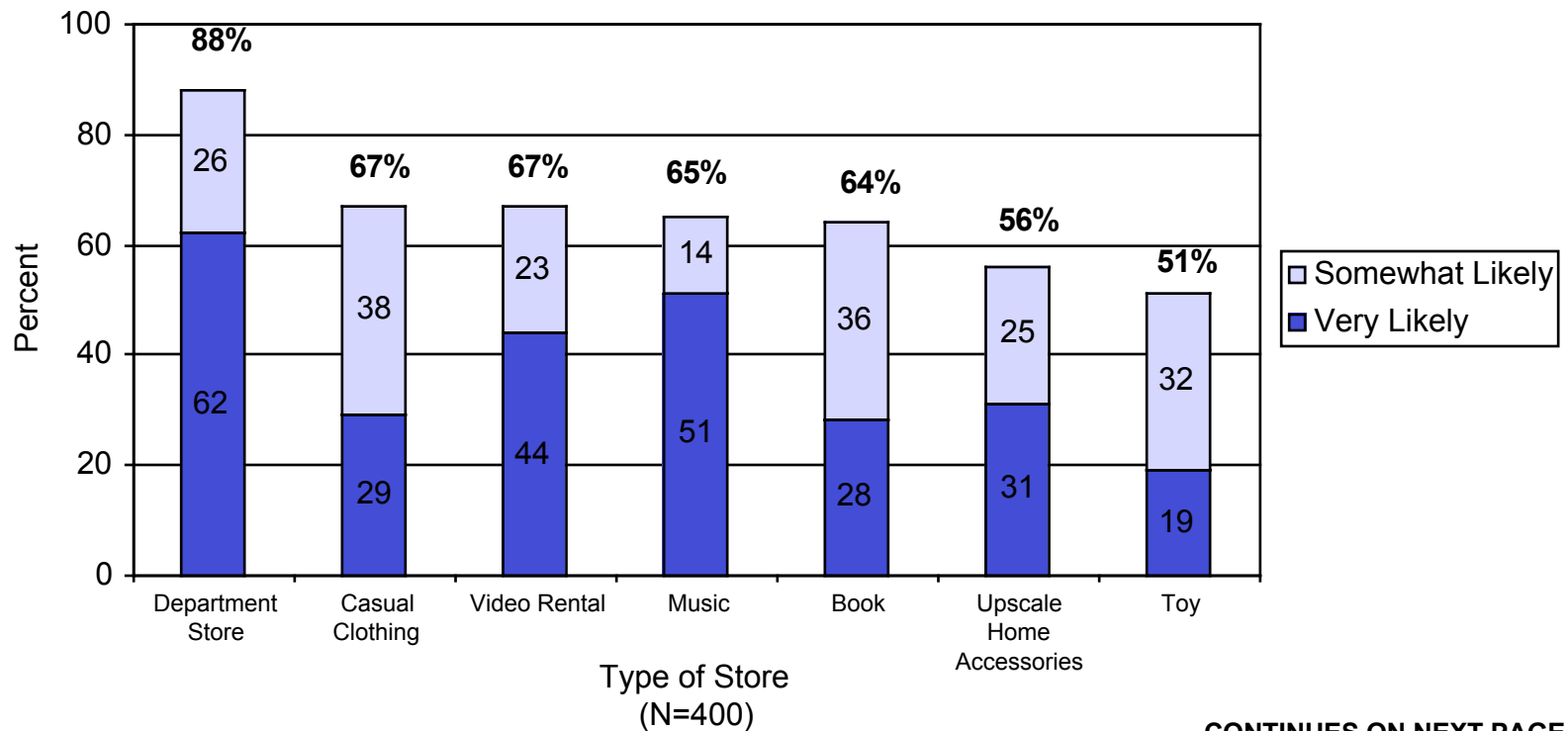
LIKELIHOOD OF PATRONIZING VARIOUS TYPES OF STORES

Respondents are most likely to shop downtown at:

- Regular department stores (like Foley's or Dillard's)
- Casual clothing stores (like The Gap or J. Crew)
- Music stores (like Tower Records or Waterloo Records)
- Video stores (like Blockbuster or I Love Video)
- Book stores (like Bookstop, BookPeople, or Half-Price Books)

LIKELIHOOD OF PATRONIZING VARIOUS TYPES OF STORES

Percent of nearby residents likely to shop at various types of stores (if located downtown).

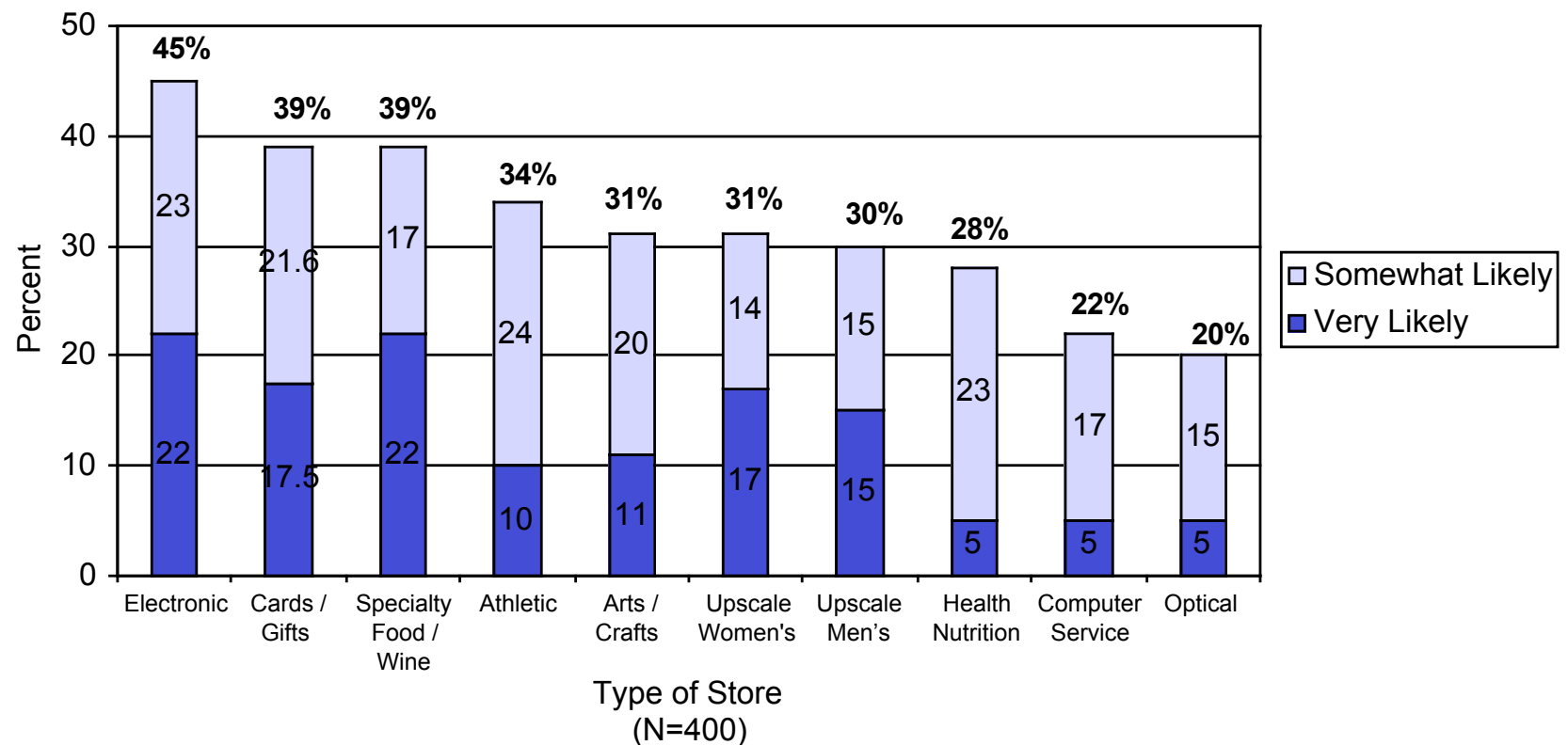


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“Next I’m going to read a list of different types of retail businesses. For each one, please tell me how likely you or someone else in your household would be to shop there if it were located in the downtown area.” [very likely, somewhat likely, not so likely, or not at all likely]

LIKELIHOOD OF PATRONIZING VARIOUS TYPES OF STORES

Percent of nearby residents likely to shop at various types of stores (if located downtown).



"Next I'm going to read a list of different types of retail businesses. For each one, please tell me how likely you or someone else in your household would be to shop there if it were located in the downtown area." [very likely, somewhat likely, not so likely, or not at all likely]

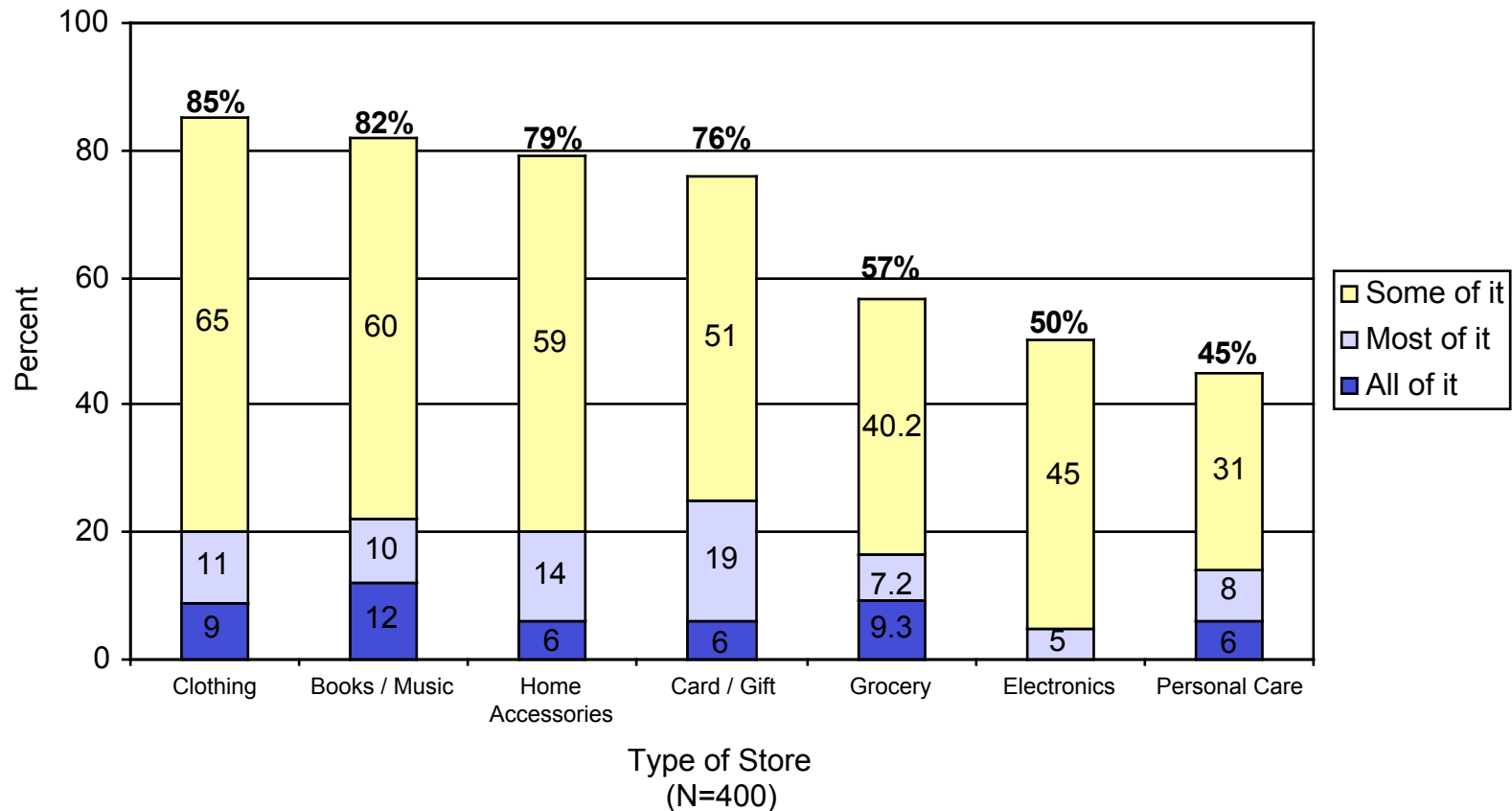
AMOUNT OF SHOPPING AT VARIOUS TYPES OF STORES

If these types of stores were available downtown, most area residents would do at least some of their regular shopping there:

- Clothing stores
- Books / Music stores
- Home Accessories stores
- Cards / Gifts stores
- Grocery stores

AMOUNT OF SHOPPING AT VARIOUS TYPES OF STORES

Percent of nearby residents that would do at least some of their shopping downtown (if located downtown).



"Next I'm going to read a list of different types of shopping goods. If there were stores downtown that appealed to you, please tell me how much of your households regular shopping you or someone else in your household would do downtown." [all of it, most of it, some of it, or none of it]

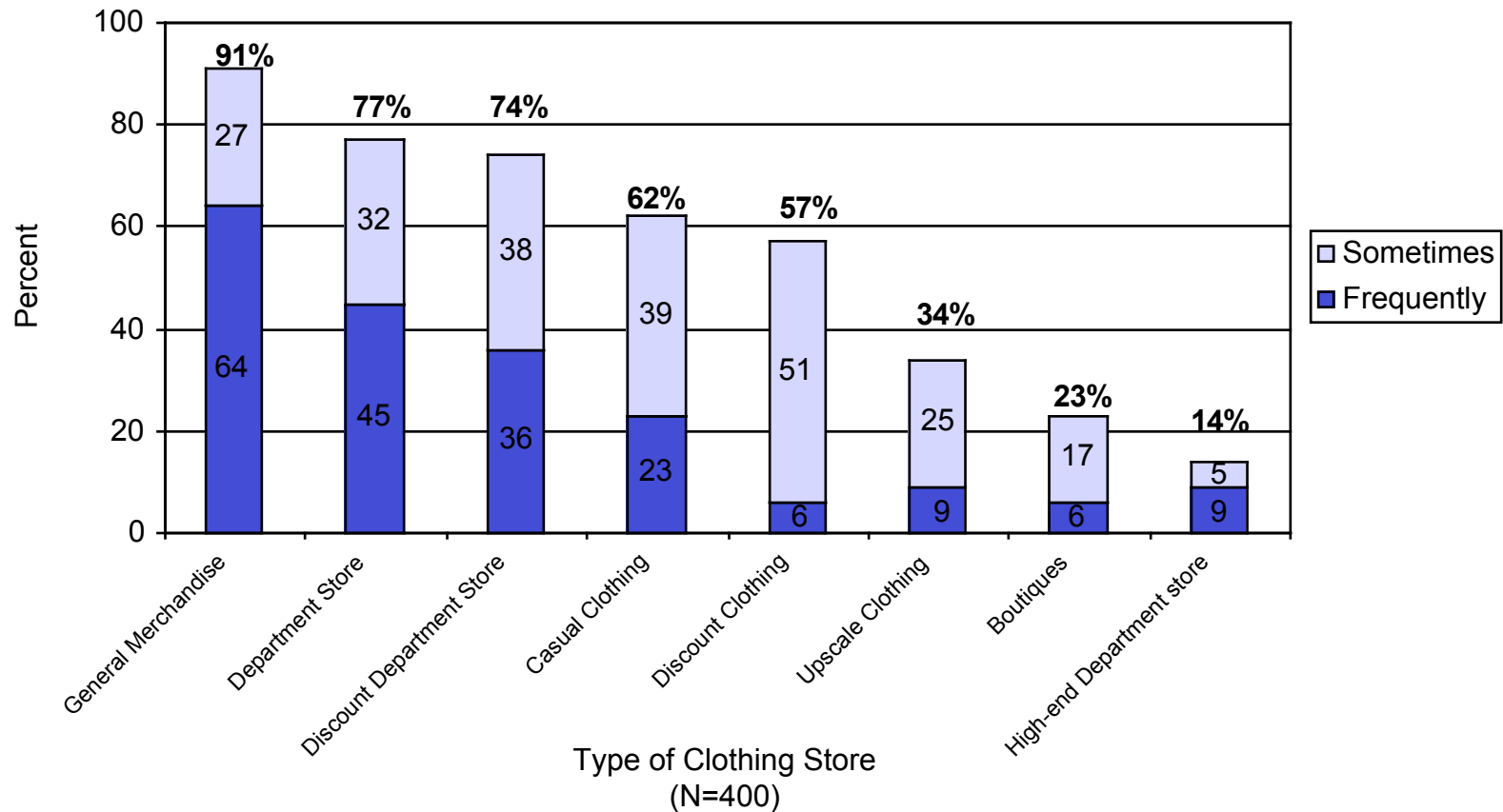
FREQUENCY OF PATRONIZING VARIOUS TYPES OF STORES FOR MEN'S CLOTHES

When shopping for men's / boy's clothing, area residents shop most frequently at:

- General merchandise stores (like Target or Wal-Mart)
- Department stores (like Foley's or Dillard's)
- Discount department stores (like Kohl's or Mervyn's)
- Casual clothing stores (like The Gap or J. Crew)
- Discount clothing stores (like Ross, T.J. Maxx, Old Navy, or Men's Wearhouse)

FREQUENCY OF PATRONIZING VARIOUS TYPES OF STORES FOR MEN'S CLOTHES

Percent of nearby residents that would shop at the following types of stores for men's / boy's clothing.



"When you or someone else in your household shops for men's / boys' clothing, how often do you buy at:" [frequently, sometimes, infrequently, or never]

FREQUENCY OF PATRONIZING VARIOUS TYPES OF STORES FOR WOMEN'S CLOTHES

When shopping for women's / girl's clothing, area residents shop most frequently at:

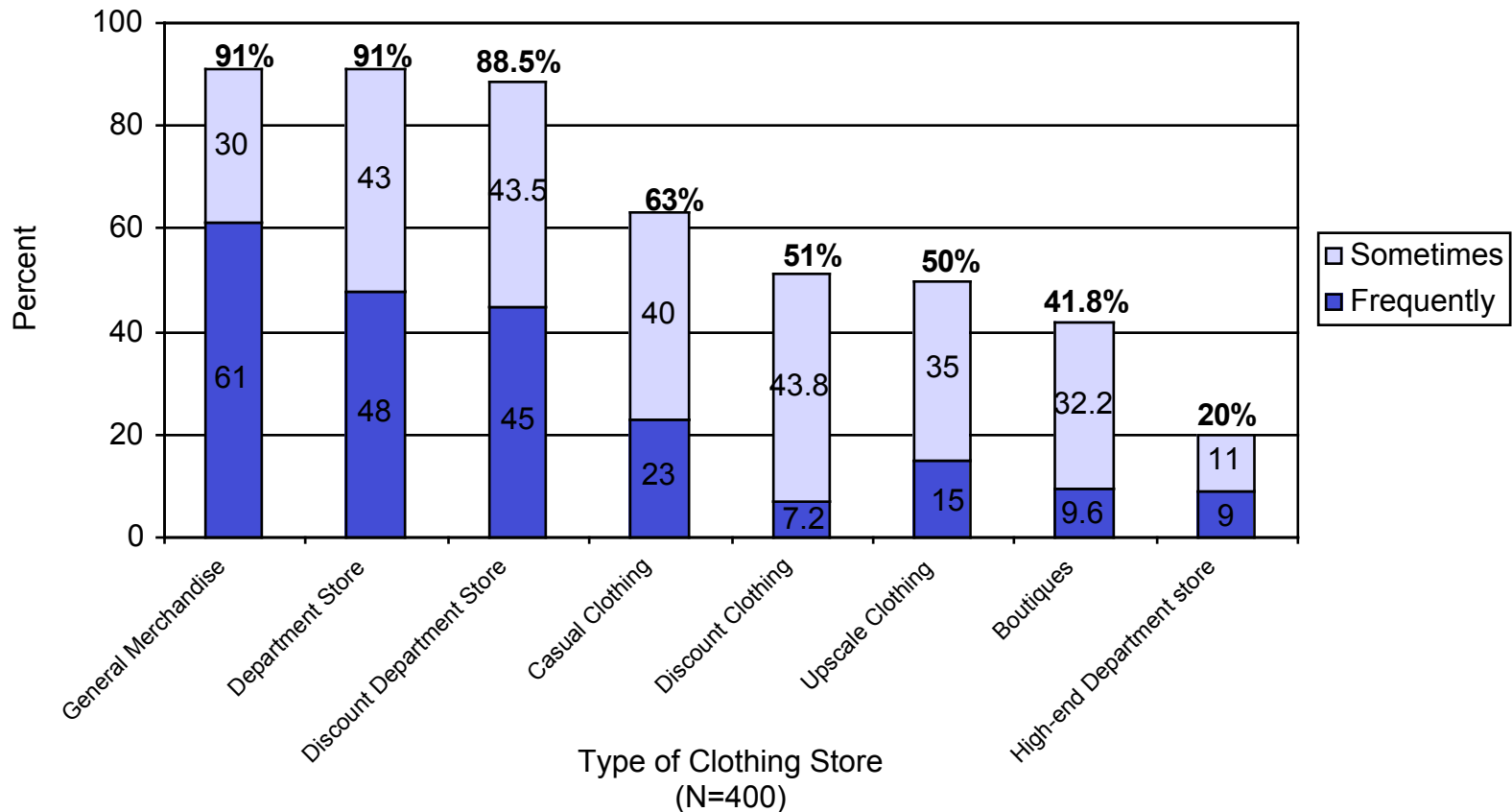
- General merchandise stores like Target or Wal-Mart
- Department stores like Foley's or Dillard's
- Discount department stores like Kohl's or Mervyn's

People who live downtown also shop fairly frequently at:

- Casual clothing stores (like The Gap or J. Crew)
- Discount clothing stores (like Ross, T.J. Maxx, or Old Navy)
- Upscale clothing stores (like Ann Taylor, Talbots, or Banana Republic)
- Boutiques (like Sue Patrick, The Garden Room, Jezebel, or By George)

FREQUENCY OF PATRONIZING VARIOUS TYPES OF STORES FOR WOMEN'S CLOTHES

Percent of nearby residents that would shop at the following types of stores for women's / girl's clothing.



"When you or someone else in your household shops for women's / girls' clothing, how often do you buy at:" [frequently, sometimes, infrequently, or never]



APPENDIX

LIKELIHOOD OF PATRONIZING VARIOUS TYPES OF STORES

Type of Store	Percent that Would be “Very” or “Somewhat” Likely to Patronize
Department Store	88%
Casual Clothing	67%
Video Rental	67%
Music	65%
Book	64%
Upscale Home Accessories	56%
Toy	51%
Electronic	45%
Cards / Gifts	39%
Specialty Food / Wine	39%
Athletic	34%
Arts / Crafts	31%
Upscale Women's Clothing	31%
Upscale Men's Clothing	30%
Health Nutrition	28%
Computer Service	22%
Optical	20%
N = 400	

“Next I’m going to read a list of different types of retail businesses. For each one, please tell me how likely you or someone else in your household would be to shop there if it were located in the downtown area.” [very likely, somewhat likely, not so likely, or not at all likely]

AMOUNT OF SHOPPING AT VARIOUS TYPES OF STORES

Percent of nearby residents that would do at least some of their shopping downtown (if located downtown).

Type of Store	Percent ("all", "most" or "some")
Clothing	85%
Books / Music	82%
Home Accessories	79%
Card / Gift	76%
Grocery	57%
Electronics	50%
Personal Care	45%
N = 400	

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FREQUENCY OF PATRONIZING VARIOUS TYPES OF STORES FOR MEN'S CLOTHES

Percent of nearby residents that would frequently or sometimes shop at the following types of stores for men's / boy's clothing.

Type of Store	Percent
General Merchandise Store	91%
Department Store	77%
Discount Department Store	74%
Casual Clothing Store	62%
Discount Clothing Store	57%
Upscale Clothing Store	34%
Boutiques	23%
High-end Department store	14%
N = 400	

"When you or someone else in your household shops for men's / boys' clothing, how often do you buy at:" [frequently, sometimes, infrequently, or never]

FREQUENCY OF PATRONIZING VARIOUS TYPES OF STORES FOR WOMEN'S CLOTHES

Percent of nearby residents that would frequently or sometimes shop at the following types of stores for women's / girl's clothing.

Type of Store	Percent
General Merchandise Store	91%
Department Store	91%
Discount Department Store	88.5%
Casual Clothing Store	63%
Discount Clothing Store	51%
Upscale Clothing Store	50%
Boutiques	41.8%
High-end Department store	20%
N = 400	

"When you or someone else in your household shops for women's / girls' clothing, how often do you buy at:" [frequently, sometimes, infrequently, or never]