UNIVERSITY OF WISCONSIN
River Falls
SURVEY RESEARCH CENTER

2021 Whitewater Area Consumer Survey Report

Survey Research Center
University of Wisconsin – River Falls

Shaheer Burney
David Trechter

Survey Research Center Report 2021/18
November 2021

UNIVERSITY OF WISCONSIN
River Falls
SURVEY RESEARCH CENTER

THE SURVEY RESEARCH CENTER (SRC)

The Survey Research Center (SRC) is a research organization at the University of Wisconsin – River Falls in River Falls, Wisconsin. Since 1990, the SRC has provided statistically sound, low-cost information gathering services for academics, local units of government, non-profit groups, school districts, and other organizations. The SRC conducts surveys on a wide variety of topics including customer satisfaction, resident experience, business climate, equity and inclusion, labor needs, etc. The SRC is directed by Dr. Shaheer Burney and currently employs two staff members, Denise Parks and Dr. David Trechter, and eight student assistants.

UNIVERSITY OF WISCONSIN
River Falls
SURVEY RESEARCH CENTER

ACKNOWLEDGEMENTS

We thank Denise Parks, Associate Director of the Survey Research Center for her assistance in the completion of this study. We also thank Steve Chmielewski, Community Development Educator of Waukesha and Jefferson County, WI and Kellie Carper, Executive Director of the Whitewater Area Chamber of Commerce & Tourism Council for their assistance in questionnaire development and distribution. In addition, we thank Kristine Zaballos, Writer and Editor at University of Wisconsin – Whitewater for assisting the SRC team with distributing the survey to university affiliates.

UNIVERSITY OF WISCONSIN
River Falls
SURVEY RESEARCH CENTER

TABLE OF CONTENTS

EXECUTIVE SUMMARY

The goal of this survey was to gauge the perception of Whitewater area shoppers about the types of businesses available in the area and businesses they would like added to the mix. The sample collected includes substantial proportions of University of Wisconsin – Whitewater (UWW) students (56% of the sample), Whitewater area residents (68%), females (62%), those under 25 years of age (44%), and White (90%) respondents. Key findings from the survey are outlined below.

- The three categories of businesses at which respondents shop most frequently in Whitewater are eating out, banking/financial, and government. While the top three categories are consistent for all demographic subgroups, the residents subgroup (residents of zip code 53190) shops most frequently for the eating out and banking/financial categories while the Age > 25 (respondents aged 25 years or over) subgroup shops most frequently for banking/financial services.

- Price, quality, and variety are three major factors for respondents when shopping for various products and services.
    - Price is a major factor when respondents shop for transportation, e-commerce, entertainment, retail, and sports.
    - Quality is a major factor when respondents shop for full-service dining, professional services, education services, health and wellness, cultural events, entertainment, and retail.
    - Variety is a major factor for sports, cultural events, retail, and entertainment.

- Respondents shop most frequently in Janesville, Whitewater Westside, and Ft. Atkinson. Janesville and Whitewater Westside locations are ranked first and second depending on the demographic subgroup considered. Downtown Whitewater is in the top three locations for the Students subgroup only.

- The top three categories that respondents shop primarily in Whitewater for are pharmacy, florists, and automotive parts. while all demographic subgroups ranked pharmacy as the top category, there is some variation among demographic subgroups regarding the rest of the top three.

- When asked about why respondents do not primarily shop in Whitewater, “selection” and “availability” were the top two reasons for all shopping categories and “price” was the third most popular response for *almost* all shopping categories.

- Grocery store, bakery, and health foods were the top three businesses that respondents identified they would patronize most frequently if they opened in Whitewater. Grocery store was the top response among all demographic subgroups while bakery and health foods were the second and third responses for *almost* all demographic subgroups.

- Respondents eat out most frequently for dinner, followed by lunch and breakfast. This is true for the overall sample as well as for all demographic subgroups. The Male and Income < $50k (households with annual income less than $50,000) subgroups eat out for dinner more frequently relative to other subgroups and the Male subgroup eats out for lunch and breakfast more frequently relative to other subgroups.

- Fast food and full service: casual are the most popular restaurant types, ranking first and second, for the overall sample as well as all demographic subgroups. Full service: fine dining and food delivery rank third depending on the demographic subgroup considered.

- Among restaurants that respondents are most likely to visit if they opened in Whitewater, the top three responses were Italian, family restaurant, and Chinese/Japanese. Most demographic subgroups selected these as their top three, except the Students subgroup that selected coffee shop, the Male subgroup that selected barbeque, and the Income < $50k subgroup that selected fast food as their third choice.

- Farmers Markets, live music shows, and community festivals are the top three events that respondents plan to attend within the next 12 months. All demographic subgroups selected these as their top three events.

- Cooking, computer/internet, and reading are the top three leisure activities in which respondents participate. With the exception of the Students subgroup, that selected traveling over reading, all demographic subgroups selected these three as the top three leisure activities.

- About a third of the overall sample indicated that they don’t listen to radio at all. Among radio listeners, the top radio stations were Sirius Radio, 104.5 WSLD, and 107.3 WSJY. Only respondents in the Age > 25 subgroup did not select “do not listen” as their primary response.

- About two-thirds of the overall sample said they do not read a newspaper. This was most common in the Students subgroup and least common in the Age > 25 subgroup. Among newspaper readers, reading online is significantly more popular than reading print newspapers.

SURVEY BACKGROUND AND METHODOLOGY

In May 2021, the Survey Research Center (SRC) worked with the Discover Whitewater offices, including the Whitewater Area Chamber of Commerce, the Whitewater Tourism Council, UW-Extension, and Downtown Whitewater Inc., to conduct a market study aimed at gathering information about consumer shopping patterns in the Whitewater area. The SRC developed an online survey questionnaire in summer 2021, in partnership with Discover Whitewater. The survey was officially launched in September 2021.

Two parallel distribution methods were utilized. First, the SRC distributed the survey link through a personalized email to a random sample of Whitewater area residents. A list of email addresses was purchased by the SRC from a list broker. Second, the survey link for a duplicate online survey was distributed through University of Wisconsin – Whitewater (UWW) to faculty, staff, and students. The UWW Marketing and Communications department promoted the survey by including a survey invitation and description in a campus-wide email. To avoid duplicate responses, recipients of this invitation were instructed to disregard the email if they had already received a link through a personalized email.

Data collection was completed by the third week of September. A total of 1,157 responses were received, including 168 responses from the first distribution channel (personalized email) and 989 responses from the second distribution channel (UWW promotion). Total responses far exceeded the minimum sample size needed to construct estimates within 95% confidence interval. Data compilation and analysis was completed in October 2021. Sociodemographic characteristics of the survey sample are discussed in at length in the "Demographics of the Sample" section and are presented in table 14 on pages 32 and 33.

Response categories are ranked based on the highest level of agreement (for example, "more than once a week" or "extremely likely") to the lowest level of agreement (for example, "never" or "extremely unlikely"). In particular, we calculate a score for each category by assigning a weight based on the level of agreement. That is, for a question that asks about the likelihood of visiting a store, an "extremely likely" response is assigned a weight of 6 (the highest weight possible) and a "never" response is assigned a weight of 1 (the lowest weight possible). The weights are then multiplied by the proportion of respondents who selected that response to calculate the overall score.

In addition to constructing estimates and rankings of consumer preferences for the overall sample, we also present results separately for each of the following demographic subgroups: UW-Whitewater students, residents of Whitewater (zip code 53190), male respondents, respondents over the age of 25 years, and respondents with annual household income less than $50,000. These subgroups were selected based on potential differences of each group's shopping patterns relative to the overall sample. For example, the Male subgroup was selected because only 34% of the overall sample identified as male, due to which the results of the overall sample will not be representative of this demographic subgroup.

CONSUMER SHOPPING PATTERNS AND PREFERENCES

The following questions asked respondents regarding their shopping preferences within and outside of Whitewater and explored factors that may encourage respondents to increase their spending in the Whitewater area. Results are presented in sections organized by discrete themes.

I. Consumer Preferences for Shopping Within Whitewater

Question. How often do you shop in Whitewater for the following?

Figure 1 shows frequency of shopping in Whitewater by category. Rankings are determined based on the method described in the Survey Background and Methodology section on page 7. Eating out is the most popular shopping activity in Whitewater for respondents. Nearly half (46%) of respondents stated they spent money on eating out "once a week" or "more than once a week." While Shopping (Non-grocery) had the second highest share (about 36%) of money spent "once a week" or "more than once a week," it ranked lower than other categories because a large proportion of respondents (over 40%) stated they "never" or "rarely" shop in Whitewater for non-grocery shopping. The Government and Health categories had the largest proportions of respondents (22.4% and 21.4% respectively) that shop in Whitewater "more than once a week."

Figure 1. Frequency of Shopping in Whitewater by Category

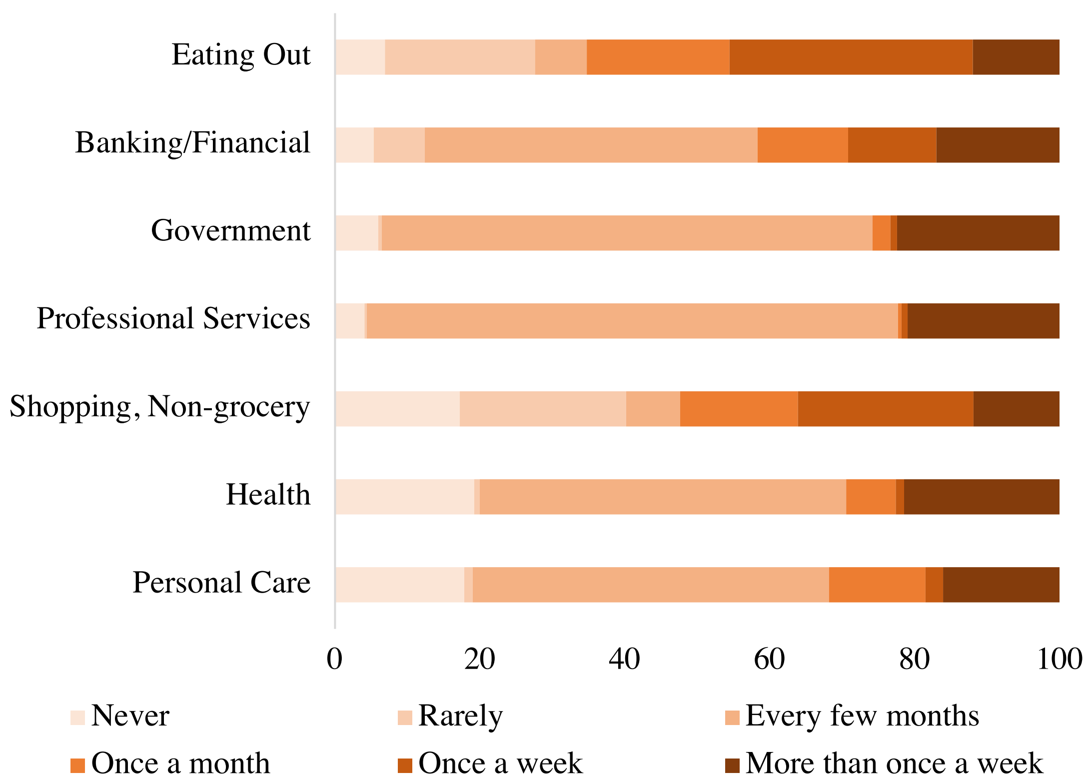


Table 1. Top 3 Whitewater Shopping Categories for Each Demographic Subgroup

Students	Residents	Male	Age > 25	Income < $50k
Eating Out (54%)	Eating Out (63%)	Eating Out (49%)	Eating Out (50%)	Eating Out (58%)
Shopping (35%)	Shopping (44%)	Shopping (40%)	Shopping (33%)	Shopping (40%)
Banking (7%)	Banking (26%)	Banking (17%)	Banking (33%)	Banking (19%)

Table 1 above shows the top three shopping categories and the proportion of respondents who indicated they shop "once a week" or "more than once a week" for these categories for demographic subgroups of respondents. The rationale for selecting these demographic groups is explained in the Survey Background and Methodology section on page 7. For all demographic subgroups, Eating Out was the most popular activity, followed by Shopping and Banking.

Question. When making purchases at the following types of services, what is most important to your decision?

Table 2 (parts 1 and 2) show factors that impact shoppers' purchase decision by shopping category. The factors that affect purchase decisions significantly vary by type of purchase. For Entertainment and Retail, "price," "quality," and "variety" are the dominant factors. "Service" does not play a major role in these decisions, which is particularly surprising for a service-based industry like Retail. For Full-Service Dining, Professional Services, Healthcare/Wellness, and Education Services, "quality" is the most important factor and far overshadows other factors. For Cultural Events, "quality" and "variety" account for the majority of responses. "Convenience" plays a major role in purchases of Transportation, Sports, and E-Commerce.

Table 2. Factors Affecting Purchase Decisions (part 1)

Entertainment	Retail	Cultural Events	Full-Service Dining	Professional Services
Quality (30%)	Variety (30%)	Variety (33%)	Quality (43%)	Quality (45%)
Variety (26%)	Price (28%)	Quality (32%)	Price (18%)	Service (24%)
Price (25%)	Quality (27%)	Convenience (18%)	Variety (16%)	Price (19%)
Convenience (16%)	Convenience (12%)	Price (16%)	Service (14%)	Convenience (8%)
Service (4%)	Service (3%)	Service (2%)	Convenience (9%)	Variety (4%)

Table 2. Factors Affecting Purchase Decisions (part 2)

Transportation	Sports	Healthcare/ Wellness	E-Commerce	Education Services
Price (40%)	Variety (29%)	Quality (42%)	Convenience (27%)	Quality (42%)
Convenience (26%)	Convenience (26%)	Service (21%)	Price (26%)	Convenience (18%)
Quality (16%)	Price (24%)	Convenience (17%)	Quality (21%)	Service (17%)
Service (12%)	Quality (17%)	Price (13%)	Service (13%)	Price (14%)
Variety (6%)	Service (4%)	Variety (6%)	Variety (13%)	Variety (9%)

Question. If you shop in the following types of stores, please indicate if you primarily shop in Whitewater, elsewhere in the area, or online/via catalogs.

Table 3 shows summarized survey responses to the question above. Over half of all respondents primarily shop in Whitewater for Pharmacy services. This is not surprising since most patrons select a pharmacy close to their residence or place of work rather than driving to a distant location. However, just under half of respondents also stated they shop outside of Whitewater or online for Pharmacy services. Florists, Automotive Parts, Cosmetics, and Office Supplies are all categories for which more than 25% of respondents stated they shop in Whitewater. Among these categories, over 25% of respondents shop online for Office Supplies. Of the 22 categories in table 3, at least 50% of all respondents shop “primarily elsewhere in the area” for 18 of them. Over two-thirds of respondents shop “primarily elsewhere in the area” for 8 of the 22 categories, including Building Materials, Home Furnitures, Lawn and Garden, Health Foods, Discount Store, Optical Goods, Patio Furniture, and Appliances/Electronics.

Table 4 shows the top three shopping categories for which Whitewater is the primary location and the proportion of respondents who indicated they shop primarily in Whitewater for these categories. For all demographic subgroups, Pharmacy was the category in which the highest proportion of respondents primarily shopped in Whitewater. Not surprisingly, the Age > 25 and Income < $50k subgroups had the highest proportion of respondents who shop primarily within Whitewater for pharmacy services. There is substantial variation by subgroup for other shopping categories. For example, Florists were among the top three shopping categories for the Residents and Age > 25 subgroups only. In addition, the Department Store category ranks in the top 3 for the Student subgroup only and the Cosmetics category ranks in the top 3 among the Income < $50k subgroup only.

Table 3. Shopping by Primary Location

Type of Store	Primarily in Whitewater	Primarily Elsewhere in Area	Primarily Online or Via a Catalog
Pharmacy	52%	41%	7%
Florists	32%	50%	18%
Automotive Parts	30%	59%	11%
Cosmetics	30%	49%	22%
Office Supplies	27%	47%	26%
Health Foods	21%	69%	10%
Pets/Pet Supplies	20%	60%	20%
Discount Store	18%	68%	14%
Optical Goods	17%	68%	15%
Lawn and Garden	16%	74%	10%
Books	15%	38%	47%
Gifts/Souvenirs	14%	55%	31%
Department Store	14%	53%	33%
Building Materials	12%	76%	12%
Sewing/Needlework	11%	64%	25%
Appliances/Electronics	8%	68%	24%
Sporting Goods	8%	66%	26%
Art Stores	7%	65%	28%
Patio Furniture	5%	68%	27%
Women's Clothing	5%	56%	39%
Jewelry	4%	63%	33%
Home Furnitures	4%	74%	22%

Table 4. Top 3 Shopping Categories for which Whitewater is Primary Location for Each Demographic Subgroup

Students	Residents	Male	Age > 25	Income < $50k
Pharmacy (25%)	Pharmacy (49%)	Pharmacy (40%)	Pharmacy (56%)	Pharmacy (55%)
Health Foods (20%)	Florists (25%)	Automotive Parts (29%)	Florists (37%)	Office Supplies (38%)
Department Store (14%)	Automotive Parts (25%)	Office Supplies (27%)	Automotive Parts (31%)	Cosmetics (35%)

Question. Please indicate why you either shop elsewhere in the area or online/via catalog for each of the following (select all that apply).

This question followed up on responses to the previous question and asked for specific reasons why respondents chose to shop outside of the Whitewater area. Only those categories in the previous question for which the respondent selected "primarily elsewhere in area," or "primarily online or via a catalog" were displayed for the respondent. Respondents were allowed to select multiple reasons for each category.

Figure 2 (on the next page) shows summarized survey responses. "Selection" and "availability" were two of the most important reasons for why respondents shopped outside of Whitewater. With the exception of Pharmacy, Automotive Parts, and Optical Goods, "selection" was significantly more important than "availability" for all other categories. Results for Pharmacy, Automotive Parts, and Optical Goods indicate that while these products and services may be available in the Whitewater area, the lack of options causes respondents to shop outside the area. For categories for which "availability" is the most important factor, it is not surprising that "selection" is second most important because lack of availability leads to lack of selection. "Quality" is the third most important factor for Automotive Parts, Cosmetics, Health Foods, Patio Furniture, Women's Clothing, and Home Furnishings categories. For all other categories (except Pharmacy), "price" is the third most important factor. "Service" and "hours" generally play a minor role in respondents' decision to shop outside of the Whitewater area, although "service" is somewhat important for Pharmacy, Automotive Parts, and Optical Goods.

II. Popular Shopping Destinations

Question. How often do you shop at the following?

Figure 3 (on page 14) shows frequency of shopping by destination. Janesville was, by far, the most popular shopping destination for respondents, as about 32% of respondents stated they shop there "once a week" or "more than once a week" and about 58% of respondents stated they shop there at least "once a month." Whitewater Westside was the second most popular destination, likely due to the presence of Walmart, with about 50% of respondents stating they shop there at least "every few months." Lake Geneva and Palmyra were ranked lowest. At least half of the respondents stated they never shop at either destination.

Table 5 (on page 14) shows the top three shopping destinations and the proportion of respondents who indicated they shop "once a week" or "more than once a week" at these destinations for each demographic subgroup. For almost all subgroups, Janesville, Whitewater Westside, and Fort Atkinson are the three most popular destinations. For Students and Age > 25 subgroups, Janesville is somewhat more popular than Whitewater Westside and for the Students subgroup only, Downtown Whitewater ranks higher than Fort Atkinson.

Figure 2. Reasons Why Respondents do not Shop in Whitewater by Category

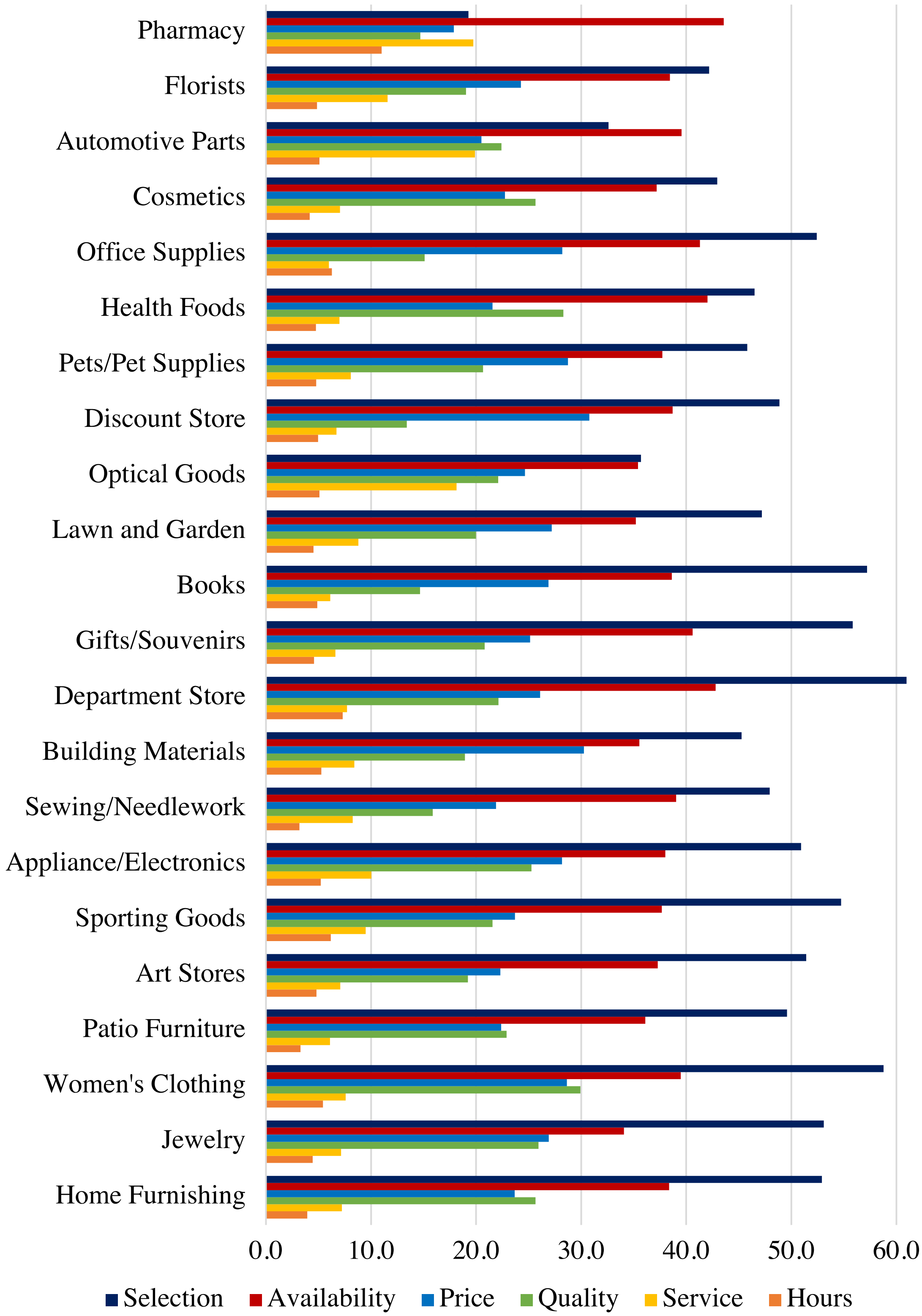


Figure 3. Frequency of Shopping by Destination

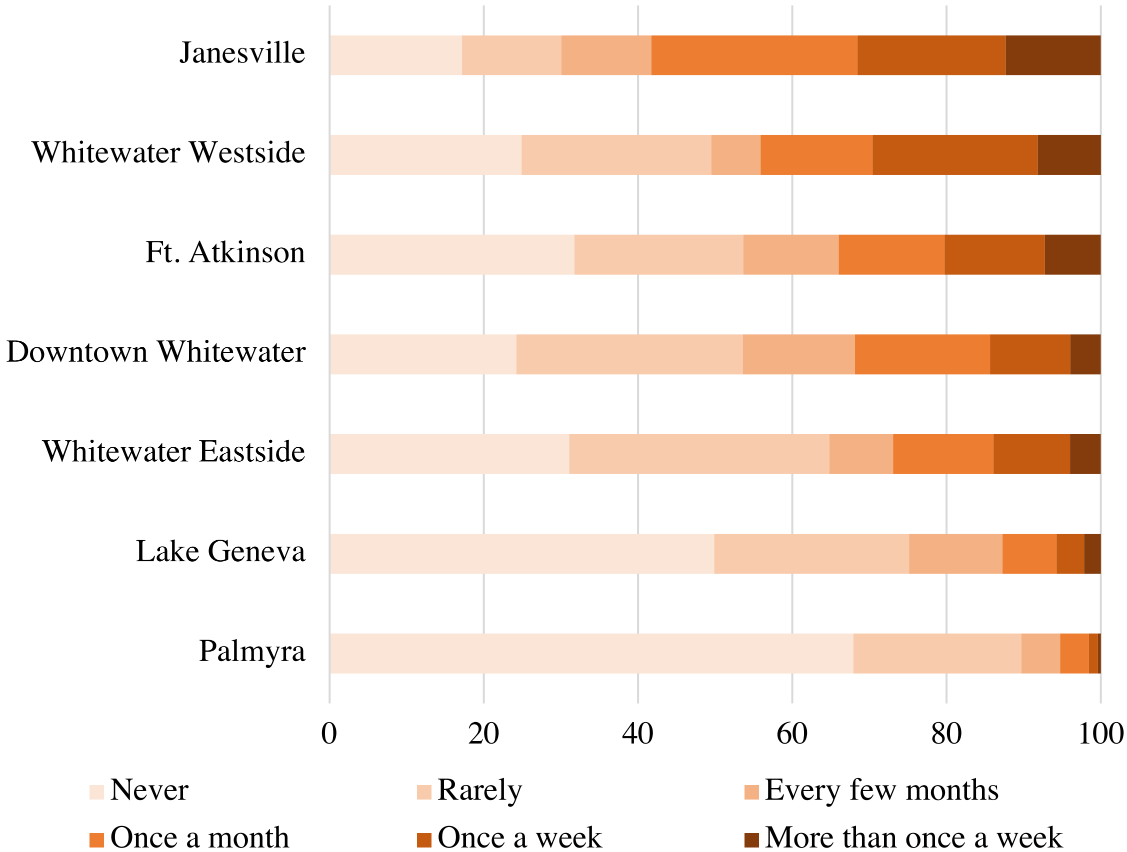


Table 5. Top 3 Shopping Destinations for Each Demographic Subgroup

Students	Residents	Male	Age > 25	Income < $50k
Janesville (16%)	Whitewater Westside (31%)	Whitewater Westside (34%)	Janesville (43%)	Whitewater Westside (37%)
Whitewater Westside (15%)	Janesville (29%)	Janesville (30%)	Whitewater Westside (38%)	Janesville (32%)
Downtown Whitewater (14%)	Ft. Atkinson (17%)	Ft. Atkinson (20%)	Ft. Atkinson (35%)	Ft. Atkinson (18%)

III. Consumer Preferences for New Businesses in Whitewater

Question. How likely are you to patronize each of the following businesses if they opened in Whitewater?

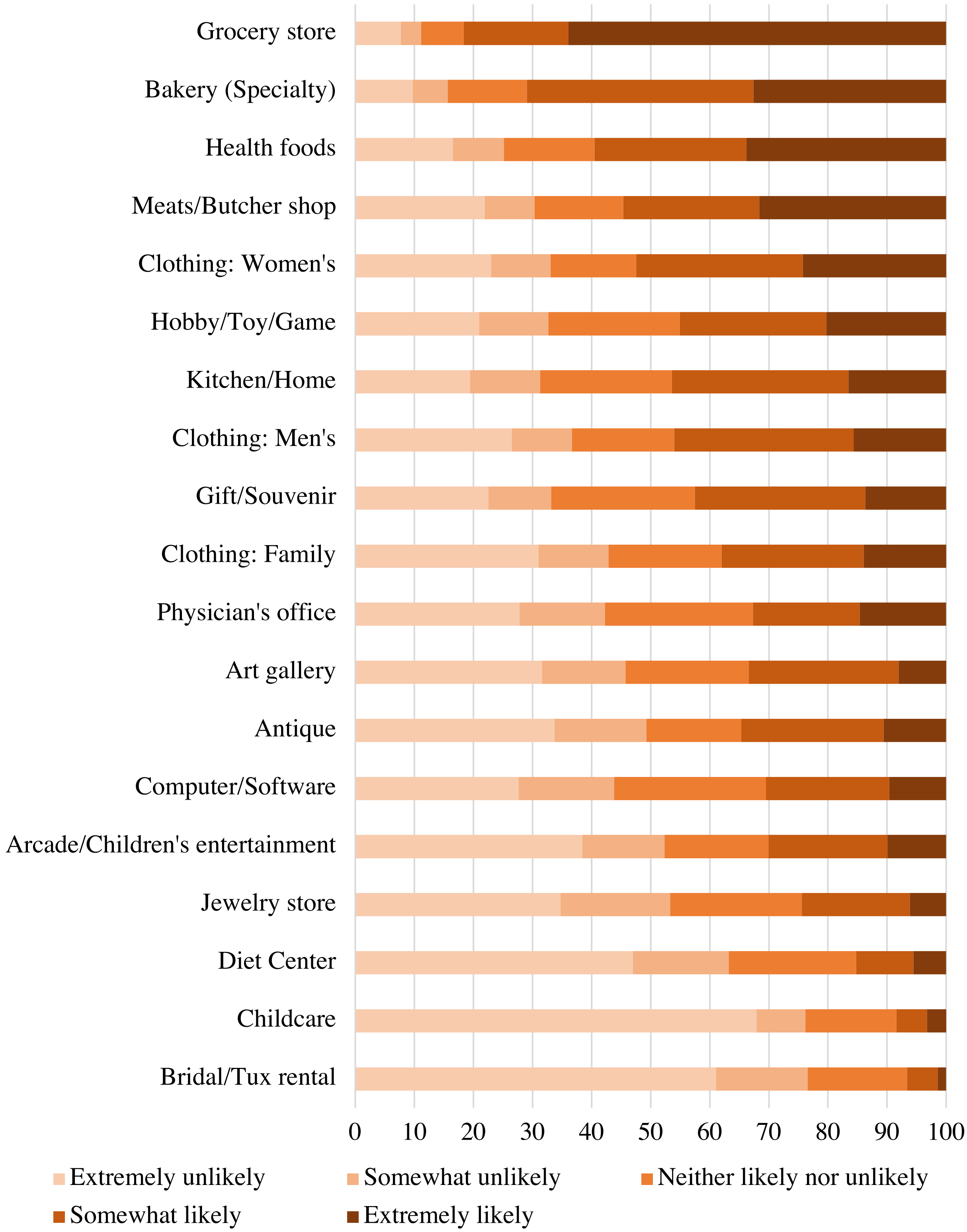
Figure 4 (on the next page) shows the likelihood of respondents patronizing each type of new business in Whitewater if they opened. The top four categories with the highest likelihood of patronage were all food-related: Grocery Store, Bakery (Specialty), Health Foods, and Meats/Butcher Shop. About 81% of respondents stated they were "somewhat likely" or "extremely likely" to patronize a grocery store and 71% of respondents stated the same regarding Bakery (Specialty). Over half of all respondents stated they were "somewhat likely" or "extremely likely" to patronize a health foods store (59%), a meats/butcher shop (55%), and a women's clothing store (52%). It is not surprising that women's clothing was ranked high as 62% of the sample identified as female. Categories that ranked lowest include Bridal/Tux Rental, Childcare, Diet Center, Jewelry Store, and Arcade/Children's Entertainment. Over half of all respondents stated they were "somewhat unlikely" or "extremely unlikely" to patronize these businesses if they opened in the Whitewater area. Part of why these categories are ranked low is that students comprise a large proportion of the sample.

Table 6 shows the top three businesses that respondents indicated they are "somewhat likely" or "extremely likely" to patronize if the business opened in Whitewater. With one exception (the Male subgroup), the top three businesses for all demographic subgroups offer food products. Similar to the overall sample, Grocery Store is the most popular business among all demographic subgroups, with over two-thirds of all respondents in the Male, Age > 25, and Income < $50k subgroups stating they would "somewhat likely" or "extremely likely" patronize. Other popular businesses were also similar to the overall sample, except the Male subgroup which selected Men's Clothing as the second business they are most likely to patronize.

Table 6. Top 3 Businesses that Respondents in Each Demographic Subgroup are Most Likely to Patronize

Students	Residents	Male	Age > 25	Income < $50k
Grocery Store (45%)	Grocery Store (58%)	Grocery Store (70%)	Grocery Store (84%)	Grocery Store (80%)
Bakery (38%)	Bakery (48%)	Men's Clothing (57%)	Bakery (73%)	Bakery (72%)
Health Foods (33%)	Health Foods (42%)	Bakery (54%)	Meats/Butcher (72%)	Health Foods (62%)

Figure 4. Likelihood of Patronizing New Whitewater Business by Category



Question. How likely are you to patronize each of the following restaurants if they opened in Whitewater?

Figure 5 (on the next page) shows the likelihood of respondents patronizing each type of new restaurants if they opened in Whitewater. Italian, Family Restaurant, and Chinese or Japanese were three of the highest ranked restaurants for respondents, with about 69% selecting Italian, about 65% selecting Family Restaurant, and about 66% selecting Chinese or Japanese as restaurants they are "somewhat likely" or "extremely likely" to patronize. While Chinese or Japanese restaurants had a slightly greater proportion of respondents at least "somewhat likely" to patronize them than was the case for family restaurants, a higher proportion (about 21%) also said it is "somewhat unlikely" or "extremely unlikely" they would patronize a Chinese/Japanese restaurant compared to only about 18% for Family Restaurant.

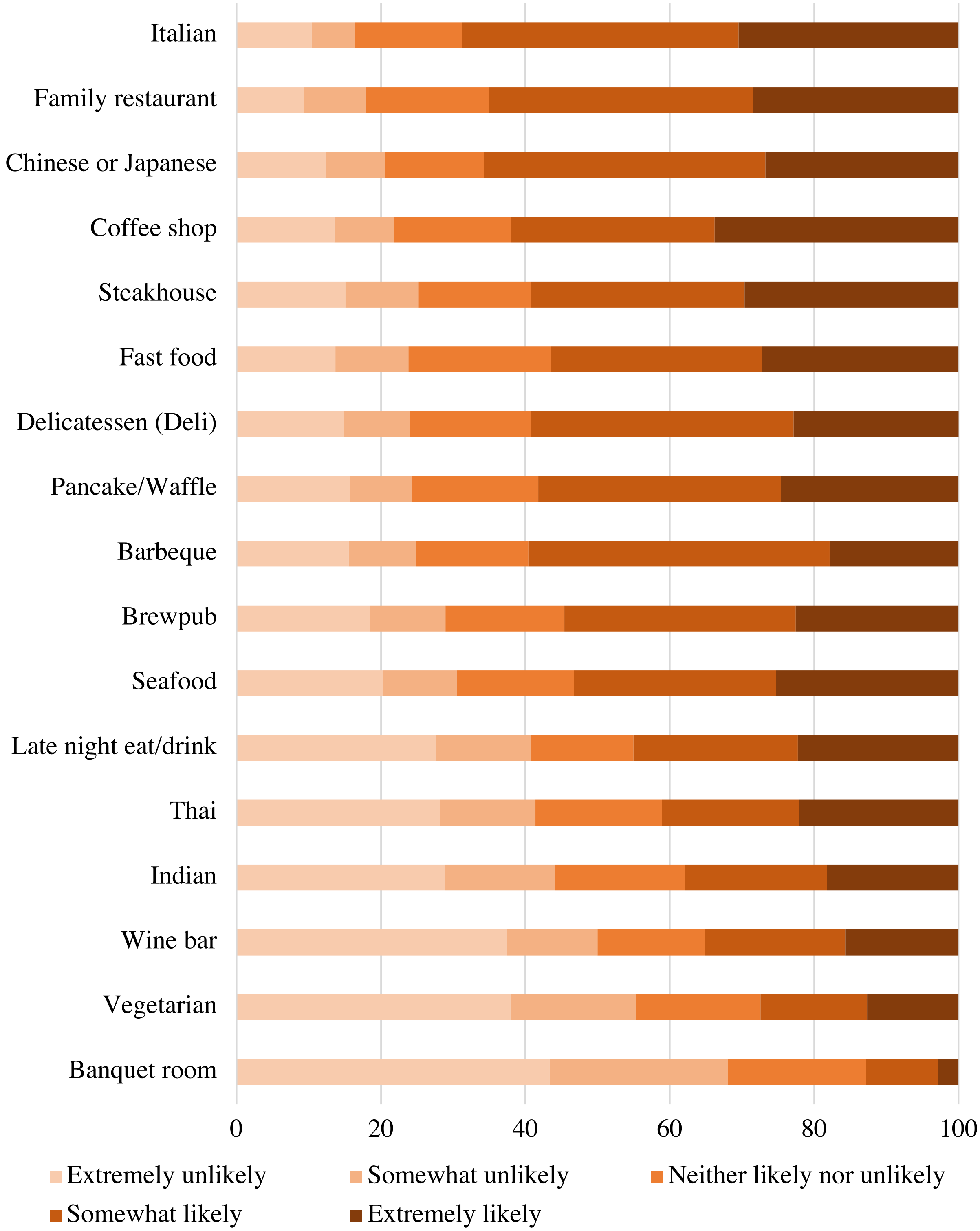
Banquet Room, Vegetarian, and Wine Bar were the least popular restaurants among respondents. Half or more said they were somewhat or extremely unlikely to patronize a banquet room (68%), a vegetarian restaurant (55%), or a wine bar (50%).

Table 7 shows the top three new restaurants that respondents of each demographic subgroup are most likely to patronize. Excluding respondents in the Age > 25 subgroup, Italian is the most popular category among all other demographic subgroups and is most popular among respondents in the Income < $50k subgroup. Chinese or Japanese is the second most popular category as it is included in the top three of all subgroups except Students. Other popular categories include Family Restaurant, Fast Food, Barbeque, Coffee Shop, and Pancake/Waffle.

Table 7. Top 3 New Restaurants Respondents are Most Likely to Patronize for Each Demographic Subgroup

Students	Residents	Male	Age > 25	Income < $50k
Italian (38%)	Italian (48%)	Italian (57%)	Chinese or Japanese (67%)	Italian (70%)
Pancake/Waffle (35%)	Family Restaurant (45%)	Chinese or Japanese (55%)	Italian (66%)	Chinese or Japanese (68%)
Coffee Shop (35%)	Chinese or Japanese (44%)	Barbeque (55%)	Family Restaurant (66%)	Fast Food (67%)

Figure 5. Likelihood of Patronizing New Restaurant by Type of Restaurant



IV. Consumer Preferences for Dining Out and Leisure

Question. How often do you eat out?

Figure 6 shows how frequently respondents dine out for breakfast, lunch, and dinner. About 66% of respondents dine out for Dinner at least "once a week," over half of all respondents (53%) dine out for Lunch at least "once a week," and only about a quarter of all respondents (26%) dine out for Breakfast with the same frequency. About half of all respondents spend money on eating breakfast outside "never" or "every few months."

Table 8 shows the proportion of respondents who prefer to dine out for Breakfast, Lunch, and Dinner at least "once a week." Dinner is the most popular time of day for all subgroups. In addition, respondents in the Students subgroup dine out less frequently for Breakfast, Lunch, or Dinner relative to all other subgroups. The Age > 25 subgroup dines out most frequently for Dinner, while the Male subgroup dines out most frequently for Lunch and Breakfast.

Figure 6. Frequency of Dining Out by Time of Day

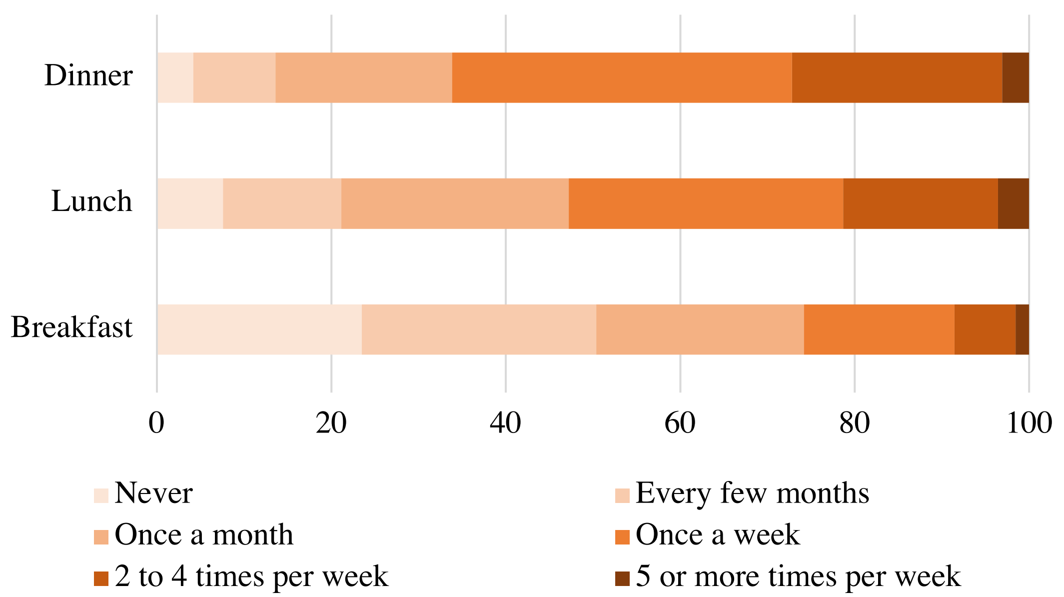


Table 8. Frequency of Dining out by Time of Day and Demographic Subgroup

Students	Residents	Male	Age > 25	Income < $50k
Dinner (40%)	Dinner (45%)	Dinner (64%)	Dinner (65%)	Dinner (64%)
Lunch (32%)	Lunch (35%)	Lunch (57%)	Lunch (53%)	Lunch (49%)
Breakfast (15%)	Breakfast (17%)	Breakfast (27%)	Breakfast (26%)	Breakfast (22%)

Question. How often do you eat at the following type of restaurants?

Figure 7 shows results for the question above. As expected, Fast Food/Drive-Thru restaurants ranked highest in frequency of visits. About 63% of respondents stated they eat at Fast Food/Drive Thru restaurants at least “once a week.” Full Service: Casual, Full Service: Dining, and Food Delivery were ranked second, third, and fourth respectively. About 43% stated they eat at Full Service: Casual, only about 12% stated they eat at Full Service: Dining, and about 17% stated they use Food Delivery at least “once a week.” Despite the fact that a higher proportion of respondents stated they use Food Delivery relative to Full Service: Dining at least “once a week,” about 77% of respondents use Full Service: Dining at least once “every few months” relative to about 49% for Food Delivery. In addition, over half of all respondents (51%) stated they “never” use Food Delivery while only about 23% of all respondents indicated they “never” use Full Service: Dining.

Table 9 (on the next page) shows the proportion of respondents by demographic subgroup who dine out at least “once a week” at each type of restaurant. Fast Food and Full Service: Casual are the most popular restaurant types among each demographic subgroup. Respondents in the Income < $50k subgroup visit Fast Food restaurants most frequently while respondents in the Students subgroup are least likely to visit Fast Food restaurants at least “once a week.”

Figure 7. Frequency of Dining Out by Type of Restaurant

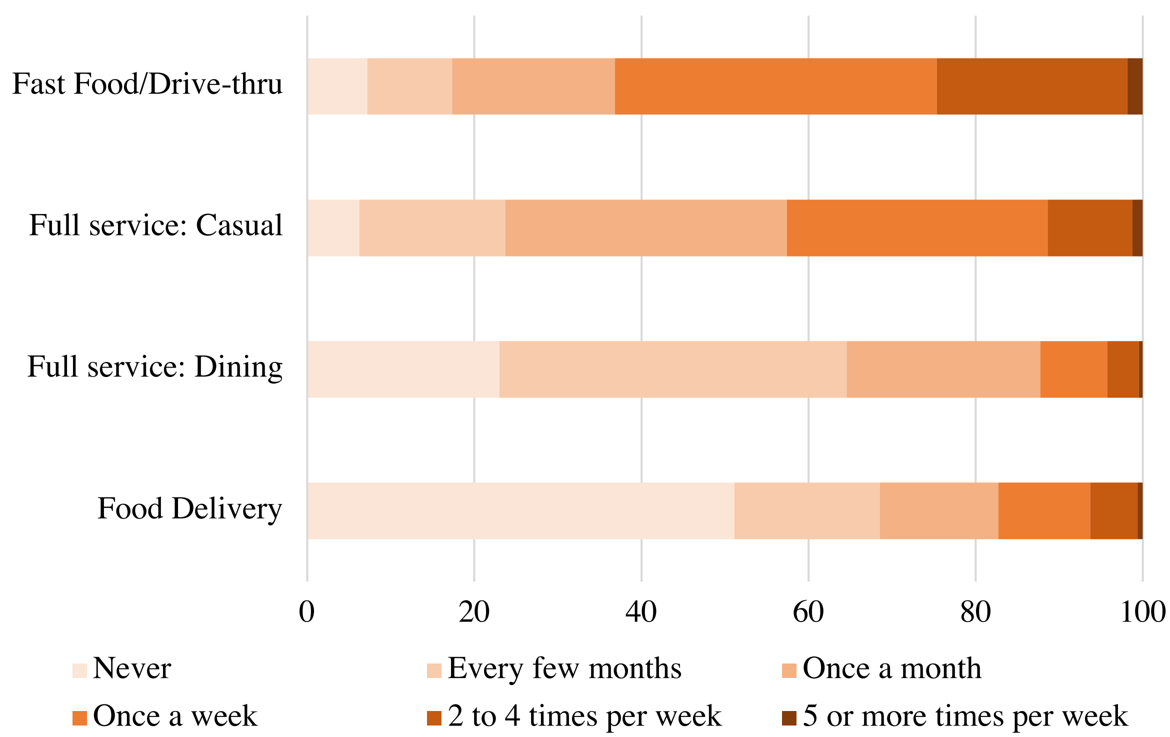


Table 9. Frequency of Dining Out by Type of Restaurant for Each Demographic Subgroup

Students	Residents	Male	Age > 25	Income < $50k
Fast Food (40%)	Fast Food (42%)	Fast Food (63%)	Fast Food (59%)	Fast Food (68%)
Full Service: Casual (24%)	Full Service: Casual (30%)	Full Service: Casual (45%)	Full Service: Casual (44%)	Full Service: Casual (35%)
Food Delivery (12%)	Food Delivery (12%)	Full Service: Fine Dining (16%)	Full Service: Fine Dining (15%)	Food Delivery (26%)
Full Service: Fine Dining (6%)	Full Service: Fine Dining (9%)	Food Delivery (11%)	Food Delivery (14%)	Full Service: Fine Dining (8%)

Question. Which of the following events do you plan to attend in the following 12 months? (Select all that apply).

This question gave respondents the option of selecting multiple answers. Figure 8 shows results from the survey. About 75% of respondents indicated they plan to attend Farmers Markets in the next 12 months, followed by 59% for Live Music Shows, and 58% for Community Festival. Not surprisingly, responses to this question seem to be correlated with seasonality and the frequency with which these events are held in communities. For example, because the survey was conducted in late summer/early Fall, Farmers Markets may have greater salience for respondents than Christmas Tree Lighting.

Figure 8. Attendance at Community Events

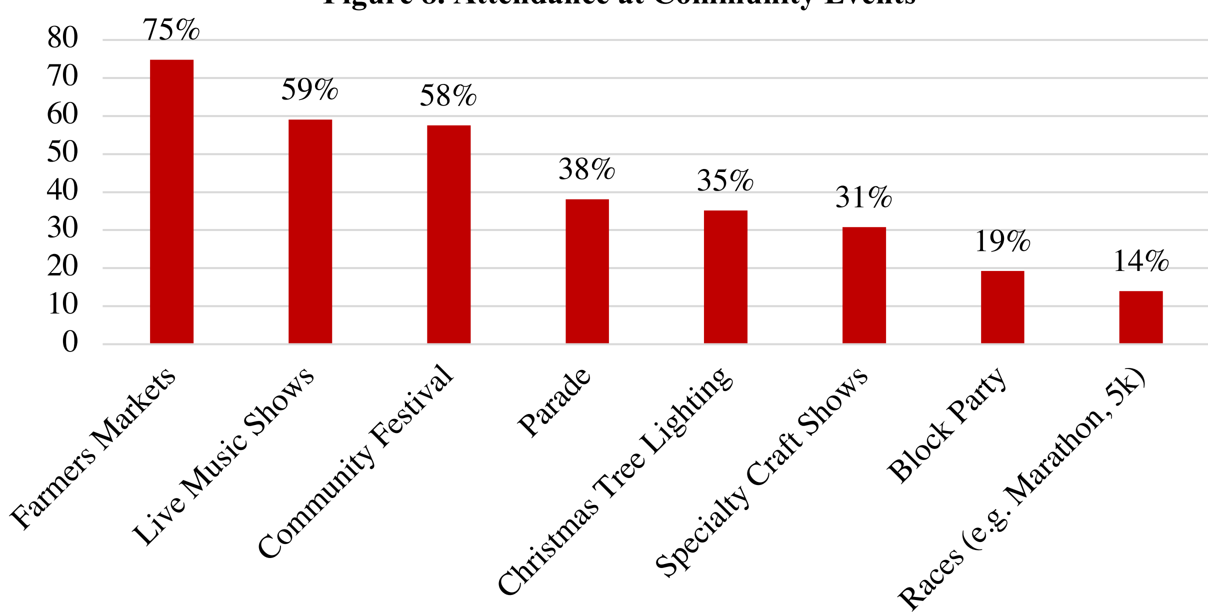


Table 10. Top 3 Community Events by Demographic Subgroup

Student	Resident	Male	Age > 25	Income < $50k
Live Music Shows (63%)	Farmers Markets (74%)	Live Music Shows (61%)	Farmers Markets (85%)	Farmers Markets (71%)
Farmers Markets (62%)	Live Music Shows (61%)	Farmers Markets (61%)	Community Festival (63%)	Live Music Shows (63%)
Community Festival (51%)	Community Festival (58%)	Community Festival (55%)	Live Music Shows (55%)	Community Festival (59%)

Table 10 shows the top three community events that most respondents in each demographic subgroup plan to attend. Farmers Markets seem to be the most popular event among respondents in the Resident, Age > 25, and Income < $50k subgroups, while a greater proportion of respondents in the Student and Male subgroups plan to attend Live Music Shows. Community Festival is the third most popular community event among all subgroups except Age > 25.

Question. How frequently does your household participate in each of the following leisure activities?

Figure 9 shows that the top three leisure activities are Cooking, Computer/Internet, and Reading. The proportion of respondents who "regularly" or "frequently" participate in Cooking, Computer/Internet, and Reading was 74%, 71%, and 54% respectively. However, there was more variation in responses to Reading than Cooking and Computer/Internet. About 27% of respondents indicated they "rarely" or "never" participate in Reading compared to only 8% for Cooking and 15% for Computer/Internet. Skiing-Downhill, Skiing-Cross Country, and Tennis were the bottom three categories; 86%, 86%, and 78% of respondents, respectively, indicated they "rarely" or "never" participate in these activities.

In the Crafts, Collecting, and Other categories, respondents were allowed to identify specific activities by entering text. In the Crafts category, popular activities included knitting, painting, crocheting, quilting, and cross-stitching. In the Collecting category, antiques were by far the most popular items and an assortment of other items (video games, rocks, etc.) were included in the responses. Only a handful of respondents chose to enter text in the Other category. No consistently popular activity was discernible among the responses, however. Activities in this category included running, Latin dancing, yoga, weightlifting, and walking.

Table 11 shows the top three leisure activities that respondents in each demographic subgroup participate in "frequently" or "regularly." Computer/Internet and Cooking are the two most popular activities. Respondents in the Student subgroup are less likely to participate in either activity as frequently as respondents in other demographic subgroups. Except respondents in the Student subgroup, who ranked Traveling as the third activity, Reading is the third most popular activity among all demographic subgroups.

Figure 9. Frequency of Participation in Leisure Activities

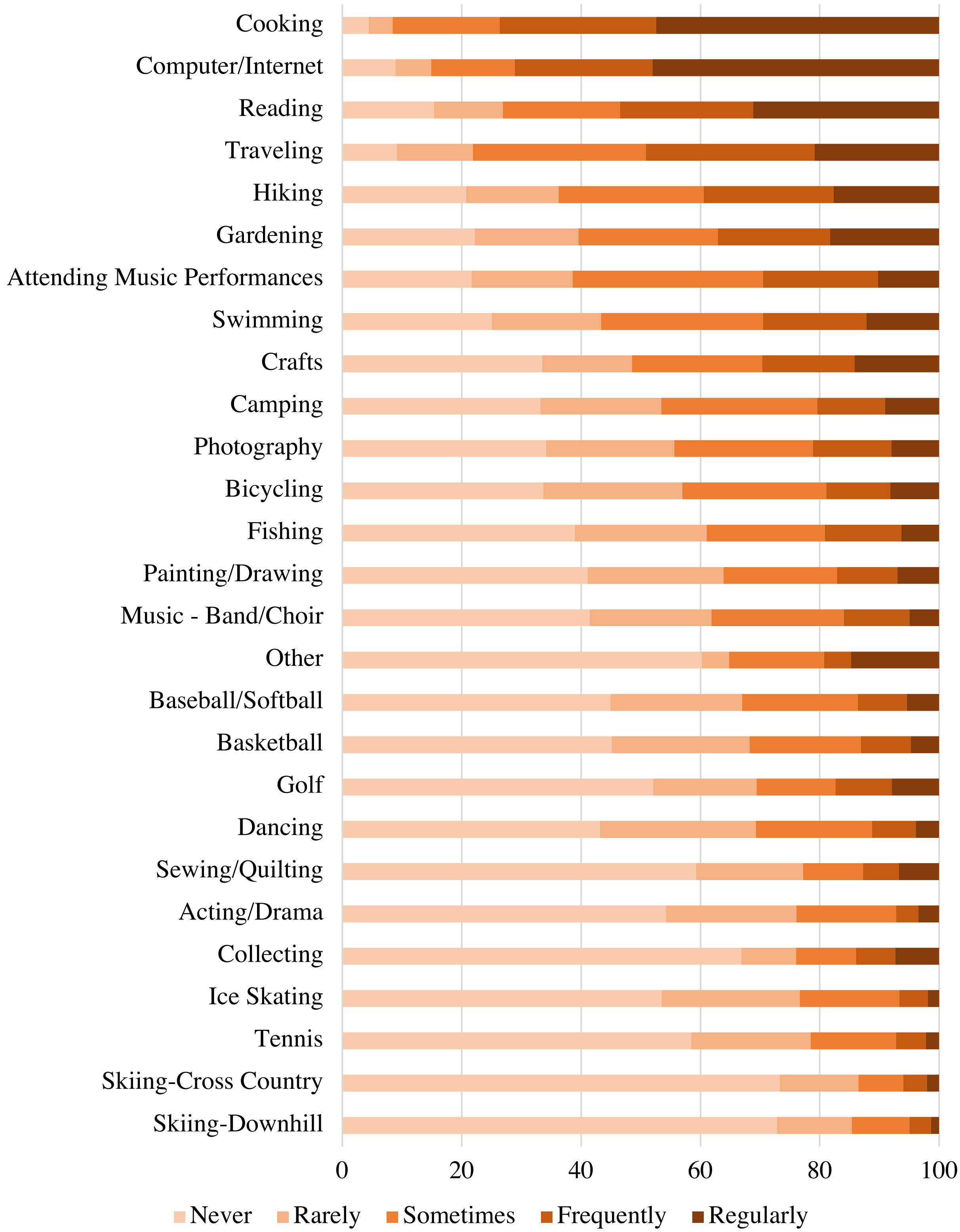


Table 11. Top 3 Leisure Activities for Each Demographic Subgroup

Student	Resident	Male	Age > 25	Income < $50k
Computer/Internet (39%)	Cooking (46%)	Computer/Internet (68%)	Cooking (75%)	Computer/Internet (68%)
Cooking (38%)	Computer/Internet (43%)	Cooking (66%)	Computer/Internet (66%)	Cooking (68%)
Traveling (20%)	Reading (30%)	Reading (41%)	Reading (65%)	Reading (43%)

V. Respondent Preferences for Radio and Newspaper

Question. Which radio station do you listen to most?

Table 13 (on next page) shows the proportion of respondents that listen to each radio station. About a third of all respondents indicated that they do not listen to radio. The Other category was the second most popular response to this question. This category included a variety of responses. Popular responses within the Other category are disaggregated and shown separately in the table (for example, 90.7 and 100.7). The remaining 20% of responses did not exhibit any discernible pattern and included responses such as “Amazon” and “bluetooth.” The three most popular radio stations among radio listeners are Sirius Radio, 104.5 WSLD, and 107.3 WSJY.

Table 12 shows the top three responses to question 12 for each demographic subgroup. Not surprisingly, the respondents in the Age > 25 subgroup are more likely to listen to radio relative to other demographic subgroups. The Other category, as described above, includes a host of open-ended responses. The second most popular response among the Age > 25 subgroup was Sirius Radio. About half of the Student subgroup and about a third of the Resident, Male, and Income < $50k subgroups indicated they do not listen to radio.

Table 12. Top 3 Responses to Radio Listenership for Each Demographic Subgroup

Student	Resident	Male	Age > 25	Income < $50k
Do not listen (49%)	Do not listen (31%)	Do not listen (32%)	Other (33%)	Do not listen (34%)
Other (25%)	Other (25%)	Other (32%)	Sirius Radio (23%)	Other (29%)
104.5 WSLD (7%)	Sirius Radio (16%)	Sirius Radio (13%)	Do not listen (15%)	104.5 WSLD (11%)

Table 13. Radio Station Listenership

Radio Station	Frequency
Do not listen to radio	31%
Other	20%
Sirius Radio	15%
104.5 WSLD	8.7%
107.3 WSJY	5.5%
94.1 WJJO	3.5%
99.9 WJVL	3.3%
102.5	1.9%
90.7	1.8%
99.1	1.7%
106.5 WKCH	1.7%
NPR	1.2%
101.5	1.2%
100.7	1.0%
102.9	0.8%
940AM WFAW	0.7%
96.1 WLKG	0.7%
1230AM WCLO	0.5%

Question. Do you regularly read a newspaper?

Figure 10 (on the next page) shows survey responses to question 13. A large majority (about 64%) of all respondents indicated that they do not read a newspaper. Among the remaining respondents, about 25% stated they read an online newspaper and 12% stated they read a print newspaper. Not surprisingly, if respondents who are students are excluded from the sample, the proportion of responses that indicate they do not read a newspaper decreases to about 46%. Among the remaining respondents, about 36% state they read an online newspaper and 18% state they read a print newspaper. In either case, online newspapers are more popular than print newspapers among newspaper readers.

Table 14 (on the next page) shows the responses to question 13 for each demographic subgroup. The Students subgroup has the lowest readership of newspapers while the Age > 25 subgroup has the highest readership. For all subgroups, online newspaper readership is substantially higher than print newspaper readership.

Figure 10. Proportion of Newspaper Readership

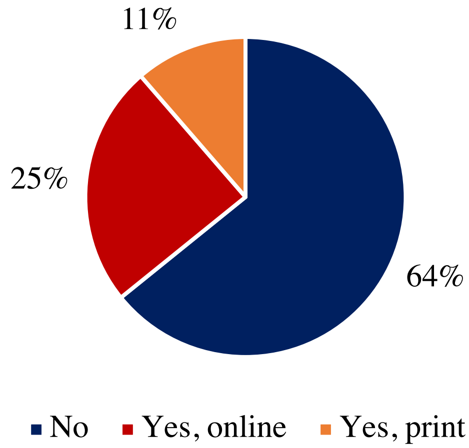


Table 14. Newspaper Readership for Each Demographic Subgroup

Student	Resident	Male	Age > 25	Income < $50k
No (84%)	No (65%)	No (61%)	No (47%%)	No (75%)
Yes, online (12%)	Yes, online (23%)	Yes, online (29%)	Yes, online (35%)	Yes, online (18%)
Yes, print (4%)	Yes, print (11%)	Yes, print (11%)	Yes, print (18%)	Yes, print (7%)

VI. Vibrant Communities

Question. Name another small city that you feel is vibrant and attractive and tell us why you feel that way about that city.

Less than half of the sample (409 out of 1,157) provided responses to this open-ended question. However, the responses did reveal several consistent themes in terms of what respondents think make a city vibrant and attractive. The most common factors that respondents commented on were (in order of frequency):

1) Availability of grocery store (other than Walmart)
2) Variety of restaurants and shopping stores in the city,
3) Lively and attractive downtown area,
4) Presence of small and unique local businesses,
5) Community events, and
6) Activities for non-student adults.

Five cities were identified as most popular among respondents: Fort Atkinson, Delavan, Lake Geneva, Janesville, and Cedarburg. Below we present a curated set of comments made by respondents that capture the general sentiment towards that city.

Fort Atkinson (54 responses):

- "Offers a place to buy decent and eatable food, quality clothing, variety of choices for fast food (like more than pizza or burgers) variety of shops and restaurants, activities for kids, just way more variety of choices."
- "Downtown has open stores and they have a grocery store."
- "It has a grocery store, multiple small shops on its main Street, variety of restaurants."
- "Great walking/biking trail, grocery stores, and it does not have college type housing scattered throughout the community."
- "Has a really great vibe in their downtown area. It is similar to Whitewater but slightly larger. During the winter you guys should put Christmas lights around the trees on Main St it would add so much to the area."
- "That's where a large proportion of faculty and staff of UW-W live rather than living among students in Whitewater itself. Also, they have grocery stores (two of them!) and a larger public library. Because so many university employees live there, there is more of a sense of public engagement, there are nicer entertainment venues and restaurants (though I do like being near Young Auditorium on campus), and people seem happier to live there. I live in a rural area between Fort and Whitewater and see Fort more as my shopping/dining/etc. destination. I think locals see Whitewater as largely seeing to students' needs."

Delavan (33 responses):

- "Has a wide variety of stores, food choices, home goods"
- "Up and coming. Does not rely on the college for business and has attractive businesses. Also, a variety of shops and places to eat."
- "Because they have many unique downtown options as well as chain restaurants that people are familiar with."
- "Has great variety of stores, Mexican, Kohls etc. A cute downtown that is vibrant."
- "Performance in bandshells, new layout for Tower Park, New coffee shop coming soon."
- "Amount of shopping available"

Lake Geneva (29 responses):

- "Downtown is healthy, interesting gift stores and restaurants, attractive lake setting."
- "Wide variety of shopping, eating options, activities and entertainment as well as many community events!"
- "Has small town charm, but also exclusivity. I'm from New York and there is no variety, no culture, no attractions, no anything. At least in LG I can shop and take the kids to the water."
- "Is half our size and has many more stores. I believe having more stores attracts more people to the city. They also put a lot of money into the lake area."
- "Abundant with various restaurants and small, local shops with charm and character that draw in visitors every year."

Janesville (19 responses)

- "Better shops and places to eat."
- "There [are] more stores there and restaurants"
- "Lots of variety with restaurants (fine dining and casual), many places to shop for clothing and other items, city wide events for the public, etc."
- "I feel this way because there are many paintings on many sides of buildings [downtown] that are all really cool and colorful. Some of the [downtown] buildings also have a really nice vibrant color as well as the signs for the shops. There is also an area that has a fountain that kids can play in that also lights up at night with multiple different colors."

Cedarburg (16 responses):

- "Has spring & fall festivals, has the arts (music, theatre etc), has stream, downtown has big variety of food and stores (cookie cutter, pizza, crafts, metal, wine, oil, bakery, antiques, crafts, dining, coffee shop, etc.)."
- "Vibrant downtown with various activities throughout the seasons. Friday concert series in the park during the summer. Many coffee shops and restaurants for both indoor and outdoor dining. Adjacent to Cedar Creek."
- "Their downtown is always up to date/renovated, events are always going on, they have a generous amount of stores with distinct variety, and it feels like a friendly, relaxing environment most of the time."
- "Lively arts and shopping scene. You always know there will be things to do when you go there. Parking is a pain but you don't care because it's worth it."
- "Many small businesses and specialty eaterys. Lots of events, festivals and community gatherings."

VII. Commuting Patterns

Question. Indicate the primary commuting route you take in Whitewater between home and work.

Figure 11 shows popularity of primary commuting patterns among respondents. The most popular response was "Main Street," followed by "Highway 12" and "Other." Within the "Other" category, respondents were allowed to enter text to specify their response. Multiple respondents entered "Walking," "Bluff Road," "Fremont Street," "Starin Road," "Highway 20," "Highway 43," "Tratt Street," and "Retired" as their responses. While "Retired" was the most common response (16 respondents) in the "Other" category, no more than 3 respondents selected each of the other responses highlighted above.

Table 15 breaks down the responses to question 20 by demographic subgroup. Main Street is the most common response among all demographic subgroups, except the Age > 25 subgroup. This is not surprising since the Age > 25 subgroup is likely comprised mostly of non-students. Similar to the overall sample, Highway 12, Highway 59, and County Road N are the other popular routes into Whitewater.

Figure 11. Commuting Routes into Whitewater

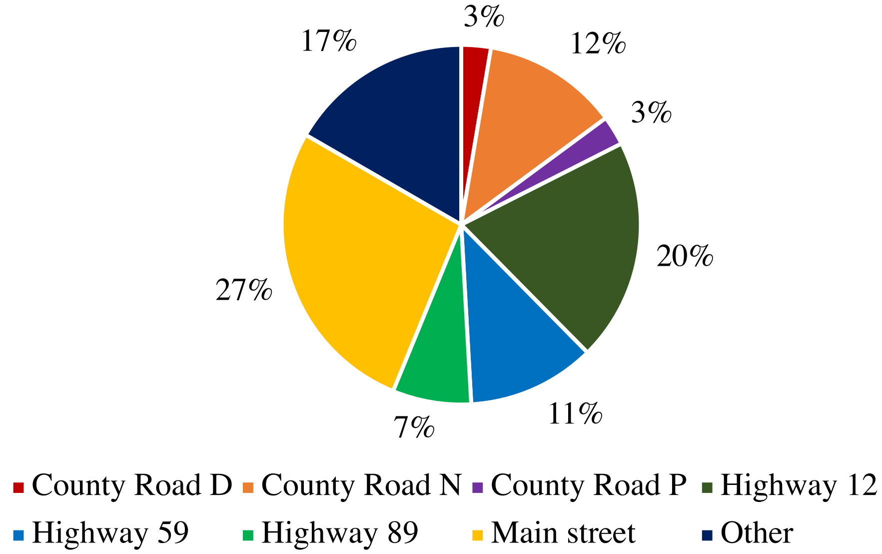


Table 15. Commuting Routes into Whitewater for Each Demographic Subgroup

Student	Resident	Male	Age > 25	Income < $50k
Main Street (43%)	Main Street (37%)	Main Street (27%)	Highway 12 (20%)	Main Street (43%)
Highway 12 (20%)	Highway 12 (16%)	Highway 12 (19%)	Main Street (19%)	Highway 12 (18%)
Highway 59 (10%)	Cty Road N (9%)	Highway 59 (12%)	Cty Road N (14%)	Highway 59 (7%)

DEMOGRAPHICS OF THE SAMPLE

Table 16 (parts 1 and 2) on the next two pages shows demographic attributes of the survey sample and select demographic attributes obtained from the US Census Bureau's American Community Survey (ACS) for zip code 53190. Note, however, that not all demographic attributes will be directly comparable between the survey sample and ACS estimates because part of the survey sample (32%) includes respondents that do not reside in zip code 53190 and are commuters.

UWW Affiliation
In the overall sample, a large majority of respondents were affiliated with the University of Wisconsin – Whitewater, with over half (56%) of all respondents being students. However, the sample of students is significantly smaller than the population of students in Whitewater (82%) according to ACS estimates. This is not surprising because, in general, students are less likely to respond to surveys and survey responses are usually inversely correlated with age. That is, survey recipients that are students and are younger are less likely to complete the survey than recipients that are non-students and older. About 18% of the overall sample were respondents not affiliated with UWW.

Residents vs. Commuters
In addition, over two-thirds of the sample included residents of Whitewater (zip code 53190) and the rest of respondents commuted to UWW from outside the Whitewater area. ACS estimates for commuters are not available.

Gender
A large proportion of the sample (62%) identified their gender as female. This gender breakdown was roughly the same for UWW-affiliated respondents. Comparing to ACS estimates, however, the survey oversampled females by a wide margin as the male-female split in the ACS is close to 50-50.

Age
A significant proportion of the overall sample was under the age of 25. This is not surprising since over half of all respondents are UWW students. For the non-UWW affiliated sample, however, the largest proportion (35%) of respondents were aged 65+ and the second largest age subgroup was of respondents between 55 and 64 years (27%). ACS estimates show that response rates increase with age group, as expected.

Education Level
About 60% of the overall sample had at least "Some College" or a "2-Year degree," and the remaining 40% of the sample had a "4-Year degree" or a "Graduate or Professional" degree. ACS estimates show that the survey clearly oversampled individuals with higher education levels. Again, this is consistent with the fact that students have a lower probability of responding to surveys.

Among non-UWW affiliated respondents, only about 46% indicated their education as at least "Some College" or a "2-Year degree," while 23% indicated having a 4-year college degree and 24% indicated having a graduate or professional degree.

Household Income

For the overall sample, about 25% of respondents had a household income less than $50,000. ACS estimates show, however, that about 52% of Whitewater residents have household income below $50,000. This discrepancy between the survey sample and the ACS arises partly because a large proportion of the low-income population consists of students, who are not accurately represented as explained under *UWW Affiliation* on the previous page, and partly because 32% of the survey sample consists of commuters, a group that has a higher median income in the sample than Whitewater residents. Among commuters, only about 17% report having household income less than $50,000. This is likely because commuters are mostly composed of UWW faculty and staff.

When restricting to non-UWW affiliates, the proportion of respondents with income below $50,000 falls to 15%. In addition, just over half (52%) of respondents in the overall sample have household incomes above $50,000 while 63% of non-UWW affiliated respondents are in this income range.

Ethnicity and Race

When asked to identify ethnicity and race, 5.5% of all respondents stated they are of Hispanic, Latino, or Spanish origin and 6% of respondents identified their race as non-White. ACS estimates show that the survey sample underrepresents Hispanic and Black residents of Whitewater, as the sample includes only 5.5% out of the 12% Whitewater residents that are Hispanic and only 1% out of the 4% Whitewater residents that are Black. Among the non-UWW affiliated sample, the proportion of Hispanic respondents was somewhat higher (7.6%) while the proportion of non-White respondents was much lower (3.8%).

UNIVERSITY OF WISCONSIN
River Falls
SURVEY RESEARCH CENTER

Table 16. Sample Demographics (part 1)

UWW Affiliation	Faculty	Staff	Student	Non-UWW				
Survey Sample	9%	17%	56%	18%				
Census	-	-	82%	-				
Residence	Whitewater	Commuter						
Survey Sample	68%	32%						
Gender	Male	Female	Non-binary	Prefer not to answer				
Survey Sample	34%	62%	1%	3%				
Census	52%	48%	-	-				
Age	Under 25	25 to 34 years	35 to 44 years	45 to 54 years	55 to 64 years	Over 65		
Survey Sample	44%	8%	11%	13%	15%	9%		
Census	48%	7%	6%	8%	9%	9%		
# of HH Members	1	2	3	4	5	6+		
Survey Sample	15%	33%	15%	24%	8%	5%		
Education	< High School	High School	Some College	2-Yr degree	4-Yr degree	Grad./Prof		
Survey Sample	0%	28%	22%	9%	16%	25%		
Census	5%	26%	- 51% -		11%	7%		
HH Income	Under $25k	$25k to $34,999	$35k to $49,999	$50k to $74,999	$75k to $99,999	$100k to $149,999	$150k+	Prefer not to answer
Survey Sample	13%	5%	7%	12%	16%	16%	8%	23%
Census	28%	11%	13%	20%	11%	10%	7%	-

Table 16. Sample Demographics (part 2)

Hispanic	Yes	No					
Survey Sample	5.5%	94.5%					
Census	11.7%	88.3%					
Race	White	Asian	Black	American Indian	Pacific Islander	Other	Prefer not to answer
Survey Sample	90%	2%	1%	0%	0%	3%	4%
Census	89%	1.6%	4%	0.2%	0.4%	5%	-

CONCLUSION

Overall, the survey provided several noteworthy results. A consistent theme throughout the survey is that the lack of a grocery store in the Whitewater area is an important source of dissatisfaction for respondents. When asked about which new business respondents are most likely to patronize in Whitewater, all demographic subgroups as well as the overall sample ranked grocery stores on top of the list. In fact, about 74% of all respondents over age 25 (primarily comprised of non-students) indicated they are extremely likely to patronize a grocery store if it opened in Whitewater. In addition, a large proportion of respondents that provided the name of another small city they considered to be vibrant and attractive included availability of a grocery store as a reason they chose that city. What makes the lack of a grocery store even more concerning is that respondents ranked “cooking” as the top leisure activity their household engages in. Cooking also ranked in the top-two of leisure activities among all demographic subgroups.

Also concerning is that when asked for what they primarily shop in Whitewater, pharmacy services was the only shopping category (out of 22) that at least half of all respondents selected. The next three highest ranked categories had support from less than a third of all respondents. This implies that most respondents travel outside of Whitewater (with Janesville and Fort Atkinson being the two most popular non-Whitewater shopping locations) to spend money. This is a significant leakage of dollars out of the Whitewater economy.

Dining out is a popular activity among respondents, with over 60% of the sample indicating that they eat out for dinner at least once a week, and that they dine at fast-food/drive-thru restaurants at least once a week, respectively. The popularity of fast-food restaurants may be a function of availability, affordability, or convenience. These responses align with information from U.S.D.A., which reports that 37% of American’s spending on food goes to restaurants.[1] Further, there appears to be a high demand for Italian restaurants among survey respondents as an overwhelming majority ranked this cuisine in the top-two new restaurants they are most likely to patronize.

Respondents indicated in multiple ways that they have a preference for cities with farmers markets, community-building events, festivals, unique small businesses, and music events. When describing small cities that are vibrant and attractive, respondents painted a picture of a small town with a cohesive community, a bustling and lively downtown area, and a variety of small shops and local eating/drinking establishments. These results might provide a blueprint that leaders in Whitewater can adapt to the cities unique environment, though on-going concerns about COVID complicate matters, at least in the near term.

In conclusion, the survey identified several key areas of opportunity to improve consumer experiences in the Whitewater area. A grocery store and food services are likely highest priority

[1] USDA Economic Research Service. (2021). Where Do Americans’ Food Dollars Go? Accessed November 5, 2021, at https://www.usda.gov/media/blog/2019/05/14/where-do-americans-food-dollars-go

for increasing spending within Whitewater. Attracting small businesses to the area and organizing regular community events will further enhance the experience of residents and may draw additional spending from residents of surrounding communities.