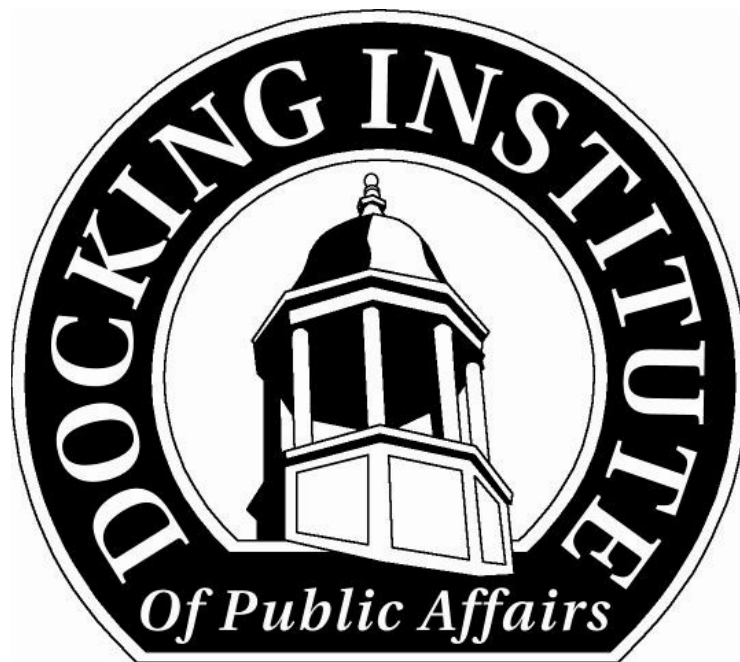
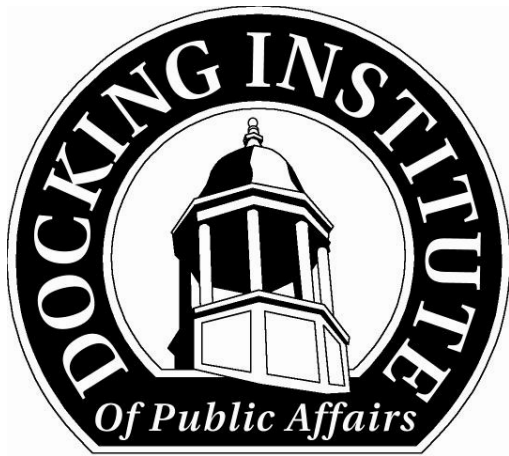


Labette County Community Climate and Retail Shopping Patterns Survey



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June 2006



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University Center for Survey Research are dedicated to
serving the people of Kansas and surrounding states.

Please do not hesitate to contact our staff with questions, comments or for assistance.

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Report by

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This research is conducted on behalf of Jeffrey Donohoe Associates, LLC, under its contract with the Kansas Department of Commerce to assist with early community planning to ensure an effective workforce investment system response to worker impacts that may result from the closure of the Kansas Army Ammunition Plant as a result of the Base Realignment and Closure recommendations in 2005.

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Executive Summary

The Docking Institute of Public Affairs at Fort Hays State University conducted a telephone survey of adult residents of Labette County as part of a larger survey that focused on labor availability issues (see Docking Institute report entitled "Southeast Kansas Labor Basin: Labor Availability Analysis 2006" under separate cover). These Labette County residents were asked questions to assess their rating of community climate and to assess the extent to which they shop outside of Labette County for common family/household items. These survey data were collected between April 10 and May 16, 2006. The overall survey cooperation rate was 58%. A total of 137 Labette County residents completed interviews providing a survey margin of error of 8.4% at the 95% confidence level, assuming no response bias.

The Docking Institute's independent analysis of survey data finds that:

- Majorities of Labette County citizens rate the following area attributes as 'good' or 'excellent,' in order: the area as a place to raise a family, quality of schools, beauty of overall community, availability of good healthcare, quality of roads and safety from crime.
- Area attributes that rate the most poorly among citizens are, in order: the area as a place with good entertainment options, availability of jobs, a place for and the availability of reasonably priced housing.
- Over half (58%) of respondents' families tend to do most of their clothes shopping outside of Labette County.
- Retail leakage is significant in the area of "autos, boats, and motorbikes," with about 46% indicating that their family buys most of these goods outside of Labette County. Another 6% indicate that they purchase these types of durables equally inside and outside of Labette County.
- About 38% buy most of their TVs and computers out of county, and another 4% buy such items equally inside and outside of Labette County.
- About 34% buy household appliances out of county, and about 3% buy these goods equally inside and outside of Labette County.
- The vast majority of respondents buy food and groceries (about 85%) and routine medical care (83%) within Labette County.
- For every good/service most often purchased by a family outside of Labette County, Joplin, Missouri is, *by far*, the most common location of the purchase. Pittsburg is a very distant second most popular place when

purchasing out of county, and Coffeyville tends to be the third most popular location.

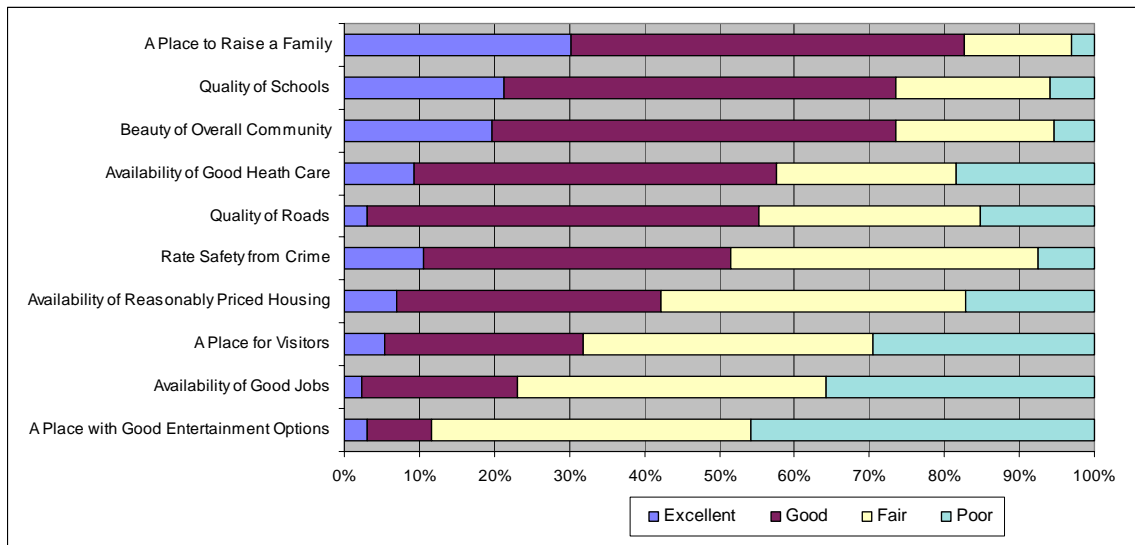
- The most common extra-local shopping associated activities are: eating at restaurants (87%); seeing concerts, movies or shows (53%); going to sporting events (46%); going to amusement or water parks (41%); museums, aquariums or zoos (39%); and engaging in outdoor recreation (38%).

Community Climate

A series of questions asked Labette County respondents to rate various aspects of their community. Figure 1 shows the responses on each item relative to the response distributions across all items. Clearly, residents rate the area very highly as a place to raise a family, with 30% giving this an excellent rating and another 53% rating it as good. On the following attributes a combined percentage of more than 50% give the attribute an excellent or good rating: quality of schools (73% excellent or good), beauty of overall community (73% excellent or good), availability of good healthcare (58% excellent or good), quality of roads (54%) and safety from crime (52%).

Residents tend to offer relatively unfavorable ratings on the following area attributes: the area as a place with good entertainment options (88% fair or poor), availability of jobs (76% fair or poor), a place for visitors (68% fair or poor) and the availability of reasonably priced housing (58% fair or poor).

Figure 1. Rating of Community Attributes

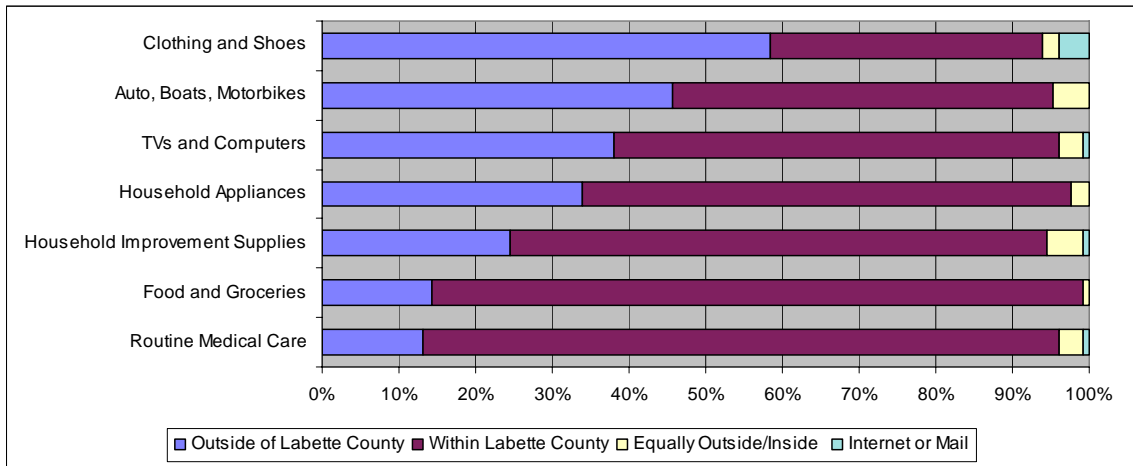


Retail Shopping Leakage and Associated Activities

Part of ascertaining the economic vitality of a local area is measuring the extent to which local residents go outside of the area to obtain goods and services. A series of questions were asked to determine the extent to which Labette County residents leave the county for purchases of common family/household goods, services, and recreation/entertainment.

For a series of items, respondents were asked to indicate "...whether your family buys most of these items within Labette County or outside of Labette County." Figure 2 shows that the type of good most often purchased outside of Labette County is "clothing and shoes," with 58% indicating that their family tends to buy outside of the county. It's also important to note that about 4% of the remaining respondents indicate that they purchase clothing and shoes through the mail or Internet, and it is very likely that this purchasing is almost fully extra-local. The second most frequent type of out of county purchasing is "autos, boats, and motorbikes," with about 46% indicating that their family buys most of these goods outside of Labette County. Another 6% indicate that they purchase these types of durables equally inside and outside of Labette County. About 38% buy most of their TVs and computers out of county, and another 4% buy such items equally inside and outside of Labette County. About 34% buy household appliances out of county, and about 3% buy these goods equally inside and outside of Labette County. The vast majority of respondents buy food and groceries (about 85%) and routine medical care (83%) within Labette County.

Figure 2. Within and Outside of County Purchasing Behavior



When respondents reported that they tend to purchase a good or service outside of Labette County, they were asked to report the community in which most of the purchasing of the particular item occurs. Tables 1 through 7 below show where most out of county purchasing occurs for each of the major goods/services reported in Figure 2. For every good/service most often purchased by a family outside of Labette County, Joplin, Missouri is, *by far*, the most common location of the purchase. Pittsburg is a very distant second most popular place when purchasing out of county, and Coffeyville tends to be the third most popular location.

Table 1. Location of Out of Labette County Clothing and Shoes Purchases

City or County	Numbers of respondents reporting a particular location of their family's out of county purchases (total n= 79).
Bartlesville	1
Baxter	1
Coffeyville	1
Crawford County	1
DK	2
Joplin	49
Kansas City	3
Miami	1
Missouri	5
Oklahoma	1
Overland Park	1
Parsons	1
Pittsburg	7
Tulsa	2
TV	1
Wichita	2

Table 2. Location of Out of Labette County Autos, Boats, Motorbikes Purchases

City or County	Numbers of respondents reporting a particular location of their family's out of county purchases (total n= 47).
Cherokee	1
Coffeyville	1
Joplin	32
Kansas City	1
Miami	1
Missouri	3
Montgomery County	2
Pittsburg	5
Wesco	1

Table 3. Location of Out of Labette County TV and Computer Purchases

City or County	Numbers of respondents reporting a particular location of their family's out of county purchases (total n= 53).
Baxter	1
Coffeyville	3
Columbus	1
DK	1
Joplin	31
Kansas City	1
Miami	1
Missouri	2
Montgomery County	1
Oklahoma	2
Online	1
Parsons	1
Pittsburg	5
Tulsa	1
Wichita	1

Table 4. Location of Out of Labette County Household Appliances Purchases

City or County	Numbers of respondents reporting a particular location of their family's out of county purchases (total n=47).
Cherokee	1
Coffeyville	1
Joplin	32
Kansas City	1
Miami	1
Missouri	3
Montgomery County	2
Pittsburg	5
Wesco	1

Table 5. Location of Out of Labette County Household Improvement Purchases

City or County	Numbers of respondents reporting a particular location of their family's out of county purchases (total n=37).
Independence	1
Joplin	26
Missouri	1
Montgomery County	1
Oklahoma	2
Oswego	1
Pittsburg	4
St. Paul	1

Table 6. Location of Out of Labette County Food and Groceries Purchases

City or County	Numbers of respondents reporting a particular location of their family's out of county purchases (total n=20).
Coffeyville	4
Columbus	1
Joplin	9
Miami	1
Montgomery County	3
Oklahoma	1
Pittsburg	1

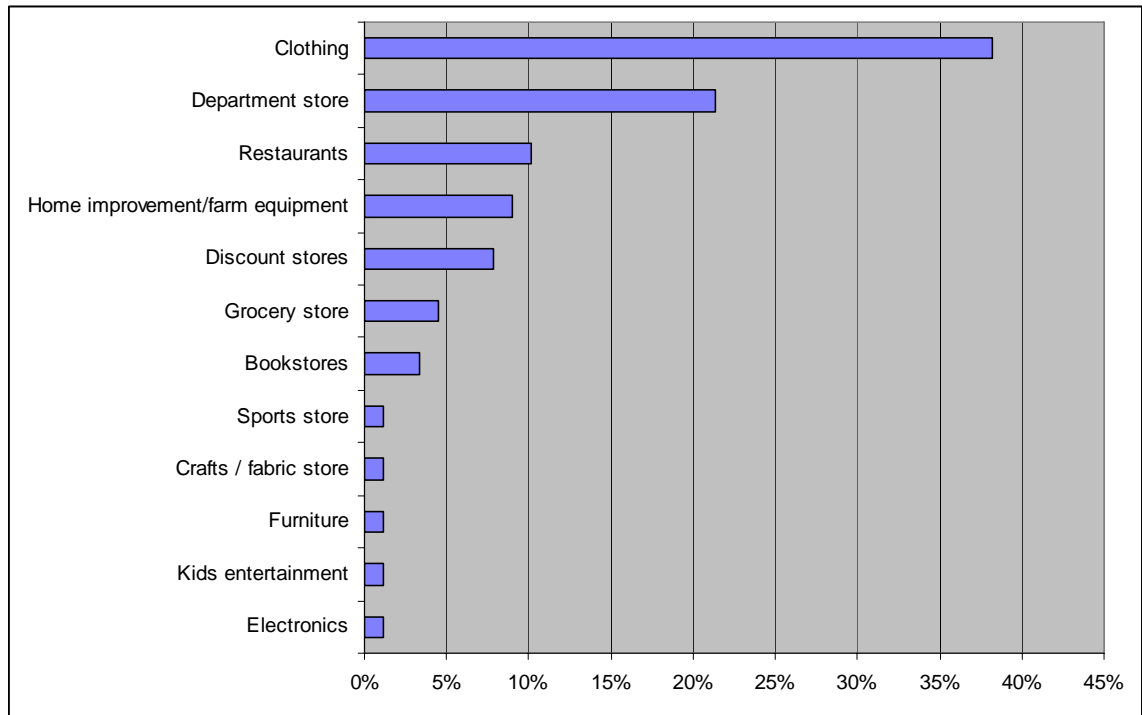
Table 7. Location of Out of Labette County Routine Medical Care

City or County	Numbers of respondents reporting a particular location of their family's out of county purchases (total n=21).
Chatopa	1
Coffeyville	3
Crawford County	1
Joplin	11
Kansas City	1
Montgomery County	1
Pittsburg	2
Vinetta	1

Immediately following the list of questions regarding whether families purchase particular goods/services inside or outside of Labette County, respondents were asked, “Can you name a specific store or specific type of store that you would like to see come to Labette County?” Figure 3 shows that retail clothing stores are the most desired type of retail store among Labette County citizens, with about 38% of respondents indicating so. It is likely that the second-most mentioned type of store, department store, also somewhat represents an expression of the desire for more clothing purchasing options. About 10% mentioned restaurants, and around 8% mentioned home improvement/farm equipment. Seven percent mentioned discount stores, and about 4.5% mentioned grocery. Less than 2% mentioned each of the following: crafts/fabric stores, furniture, kids entertainment, and electronics.

When respondents mentioned particular clothing/department stores that they/their family most desire for Labette County, J.C. Penney is, *by far*, the most frequently mentioned (data not shown).

Figure 3. Most Desired Types of Retail Stores



Extra-local Shopping Associated Activities

Finally, respondents who indicated that their family tends to buy any of the above items out of county were asked about whether they combine such purchasing with other activities while out of county. Such respondents were presented with the question, “People often do things besides shopping when they go out of town on shopping trips. Does your family usually combine shopping trips with any of these [pre-established list] activities?”

Figure 4 shows that by far the most common extra-local shopping associated activity is eating at restaurants, with about 87% reporting that their family engages in this activity. Over half (53%) of those who tend to buy at least one of the common family/household goods or services out of county also see concerts, movies or shows on their out of county shopping trip. Substantial percentages also go to sporting events (46%); amusement or water parks (41%); museums, aquariums or zoos (39%); or engage in outdoor recreation (38%).

Figure 4. Extra-local Shopping Associated Activities

