Downtown Survey Comprehensive Report

Survey Introduction and Methods

A Downtown Green Bay Consumer Survey was conducted in Fall 2011 with detailed survey analysis completed by UWGB's Center for Public Affairs in Spring 2012. The online survey is an extension of Downtown Green Bay, Inc. and Olde Main Street, Inc.'s Business Development Committee's efforts to gather valuable information pertinent to identifying downtown development opportunities and cultural amenities.

The survey was marketed through What's Up Downtown newsletter list, Chamber of Commerce's Friday Report, Green Bay Press Gazette Readers, local television stations, large area employers (i.e. WPS, APAC, Schreiber, City, County, etc.), University of Wisconsin-Green Bay's LOG Newsletter, Current Young Professionals Network, small to medium-sized downtown businesses and word of mouth.

The survey was open for four weeks beginning on August 7 through September 2, 2011. Respondents were asked to share their opinions about various downtown topics and information about their personal habits related to downtown. Their identities were kept confidential and results shared in this report are a compilation of the key findings.

Survey Monkey, an online survey tool, generated the survey results, and committee volunteers with business development and marketing backgrounds compiled the information. Dr. John Stoll, Professor of Economics and Austin E. Cofrin Professor of Management at UW-Green Bay, along with Kaitlyn Gilles, Graduate Researcher and Renee Henning, Undergraduate Student Worker both with UW-Green Bay analyzed the open-ended responses. Together they completed, "A Detailed Analysis of Open-Ended Responses" with over 90 pages of analysis. All of this has been brought together into this comprehensive summary.

The survey collected 1,799 responses but did not reach certain populations of people including those without access to Internet. Therefore, as a convenience sample it is less scientific than a random sample, but can be used for general marketing and outreach efforts for downtown.

Questions about the findings in this report or about the survey can be directed to Jeff Mirkes, Executive Director at Downtown Green Bay, Inc. and Olde Main Street, Inc. at 920.437.3423 or via e-mail at jeffm@downtowngreenbay.com.

Demographics of Respondents

1,799 people took the survey during the allotted time.

Place of Residence:
**1628 answered this question.*
- 43.7% live in the City of Green Bay
- 37% live in towns and villages within Brown County including Towns of Eaton, Glenmore, Town of Green Bay, Holland, Humboldt, Lawrence, Ledgeview, Morrison, New Denmark, Pittsfield, Rockland, Scott, Wrightstown and Villages of Allouez, Ashwaubenon, Bellevue, Denmark, Hobart, Howard, Pulaski, Suamico and Wrightstown.
- 9.8% live outside of Brown County
- 9.0% live in the City of De Pere
- 0.5% live outside of Wisconsin

Age:
**1,628 answered this question.*
- 0.4% ages 18 and under
- 8.7% ages 19-25
- 11.9% ages 26-30
- 12.9% ages 31-35
- 10.8% ages 36-40
- 11.5% ages 41-45
- 12.8% ages 46-50
- 12.9% ages 51-55
- 9.2% ages 56-60
- 8.8% ages 60 and over

Gender:
**1,628 answered this question.*
- 36.5% male
- 63.5% female

Marital Status:
**1,628 answered this question.*
- 67.1% are married
- 4.0% have a domestic partner
- 25.2% are single
- 1.5% say it's complicated
- 2.2% other

Highest Level of Education:
**1,628 answered this question.*
- 0.2% have less than a high school diploma
- 6.4% have high school diploma/GED
- 14.6% have some college
- 14.7% have a 2 year college degree (Associates)
- 48.6% have a 4 year college degree (BA, BS)
- 12.8% have a master's degree
- 1.4% have a doctoral degree
- 1.2% have a professional degree (MD, JD)

Annual Household Income:
**1,463 answered this question.*
- 5.9% less than $25,000
- 11.9% $25,001 - $40,000
- 9.8% $40,001 - $50,000
- 10.6% $50,001 - $60,000
- 7.9% $60,001 - $70,000
- 10.9% $70,001 - $80,000
- 43.0% over $80,000

According to the U.S. Census Bureau, the median household income for Brown County in 2007 was $50,926.

Core Survey Questions

1. How much leisure time do you spend in downtown Green Bay? (Downtown boundaries include Downtown District, Olde Main Street District and On Broadway District.)
**1,799 answered this question.*
- 33.7% visit 1 to 2 times per month
- 16.9% spend 1 – 2 hours per week
- 11.3% spend 3-4 hours per week
- 19.4% do not spend any time per week
- 12.0% spend 5 or more hours per week
- 6.6% other

Of the respondents spending 5 or more hours downtown, 69.3% do not live downtown.

2. What are you doing during your leisure time in downtown Green Bay? (Respondents were able to check multiple options.)
**1597 answered this question.*
- 23.5% of respondents spend leisure time **Meyer Theatre**
- 28.1% of respondents spend leisure time **nightlife**
- 27.7% of respondents spend leisure time **live music**
- 71.9% of respondents spend leisure time **dining**
- 77.9% of respondents spend leisure time **events/activities (Farmers Markets, Artstreet, Nicolet Bank's Dine on the Deck, etc.)**
- 38.0% of respondents spend leisure time **recreation/fitness (trails, etc.)**
- 6.8% of respondents spend leisure time **conferences/conventions**
- 20.9% of respondents spend leisure time **retail/shopping**
- 25.9% of respondents spend leisure time **Brown County Library**
- 13.6% of respondents spend leisure time **Neville Public Museum**
- 0.7% of respondents spend no leisure time **Downtown**
- 4.9% **other**

**Percentages do not add up to 100% due to the multiple options respondents could choose. Percentages listed represent the number of respondents who chose each individual category, i.e. dining is out of 100% and events/activities is out of 100%.*

3. **How do you prefer finding out about happenings in downtown Green Bay? (Respondents could choose top three resources, ranking "1" as their most preferred resource.)**
**1,699 respondents answered this question.*

Rating Averages were generated by Survey Monkey to summarize the rankings with scores closest to "1" being the most selected and scores closest to "3" being the least selected.

- 1.49 Rating for "What's Up Downtown" weekly E-newsletter/Electronic Newsletter/Email
- 1.69 Rating for Facebook
- 1.90 Rating for the Newspaper
- 2.05 Rating for Television
- 2.13 Rating for Twitter
- 2.14 Rating for Radio
- 2.15 Rating for Websites
- 2.16 Rating for "Not Sure"
- 2.27 Rating for Word of Mouth
- 2.32 Rating for LinkedIn
- 2.38 Rating for Posters/fliers and/or other Paper Materials
- 2.40 Rating for Magazines
- 2.42 Rating for Other Social Media Outlet

In the 2008 survey asking the same question, Facebook, Twitter and LinkedIn were not choices. Clearly there is a rising importance for updated, relevant content for Downtown Green Bay's social media outlets.

Additionally, taking the survey itself generated an interest to be informed. The "What's Up Downtown" weekly E-newsletter reaches nearly 7,500 readers with updates on downtown developments and events. Of the 60.3% survey respondents who do not receive the e-mail update, 33.6% requested to be added to the list.

4. **Would you consider living downtown?**
**1,696 respondents answered this question.*
- 7.4% already live downtown
- 25.1% yes, I would consider living downtown
- 58.4% no, I would not consider living downtown
- 9.1% not sure

Residential developers indicate 10% of any given population would consider living downtown which makes the 25% interest in 2008 and the 25% interest in again in 2011 significant.

Of the 7.4% of respondents who already live downtown, 52.4% are in the age range of 19-40 and 52.7% have a household income of $50,000 or above. The median household income for Brown County is $52,553.
UWGB analyzed the 450 open ended responses of those who explained their choice and found the following trends:
- 37% of comments mentioned some sort of housing improvement in their comments whether it was the need for a yard, perception of crime, affordability, etc.
- 26.6 % of comments explained their "no" choice, listed already being established as a key factor
- Another 17% of comments noted a need for some sort of business service including mention of a grocery store or other retail.

Respondents who selected: "yes, I would consider living downtown," "no, I would not consider living downtown" or "not sure" to question #4, were asked to answer questions 5 and 6.

For questions 5 and 6 respondents were asked to consider images prior to answering.

Picture 1 - Townhomes/Single Family Attached

Picture 2 - Townhomes/Single Family Attached

Picture 3 - Townhomes/Single Family Attached

5. **If more townhomes/single family attached housing options like those in pictures 1, 2 and 3 were available, would your interest in downtown living:**

   **1,566 respondents answered this question.*

   - 33.4% increase
   - 3.1% decrease
   - 49.5% stay the same
   - 9.8% need more information
   - 4.2% not sure

UWGB analyzed 371 open-ended responses for people who explained their answer and found 26% had favorable comments and mentioned liking the urban feel and attractiveness of the pictures.

The 33.4% who said they had an increased interest in living downtown based on these pictures shows a sizable untapped market given more housing stock options than the existing condos and apartments.

Picture 4 - Apartments/Residential Condominiums (Mixed-use: retail below, residential above)

Picture 5 - Apartments/Residential Condominiums (Mixed-use: retail below, residential above)

Picture 6 - Apartments/Residential Condominiums (Single-use: All residential)

6. **If more apartments/residential condominium housing options like those in pictures 4, 5 and 6 were available, would your interest in downtown living:**
   **1,563 respondents answered this question.*
   - 21.4% increase
   - 12.1% decrease
   - 56.2% stay the same
   - 6.3% need more information
   - 4.0% not sure

   The smaller increased percentage points on this question compared to the last question may reflect a desire for a different housing stock compared to the options shown here which are already offered with the styles of Riverside Place Condos, Flats on the Fox, Riverfront Lofts and others.

7. **What would make downtown Green Bay a more exciting place to visit?**
   **1416 respondents answered this question and UWGB summarized the following trends:*

   - 17.4% of the comments mentioned some sort of retail enhancements including more shopping options
   - 13.3 % of comments mentioned more entertainment options listing a variety of music and cultural amenities; 25 people mentioned the need for a Children's Museum which is now open but was not at the time of the survey
   - 11.9% of comments mentioned more dining options citing specifically more riverfront dining and cafes among other types

8. **Are you a downtown employee?**
   **1,682 respondents answered this question.*
   - 52.0% yes
   - 48.0% no

   Respondents who selected "yes" were asked to answer questions 9-14.

9. **How long have you worked downtown?**
   **873 respondents answered this question.*
   - 7.6% less than 1 year
   - 31.8% 1-5 years
   - 21.2% 6-10 years
   - 13.1% 11-15 years
   - 26.3% more than 15 years

10. Do you like having your place of employment downtown?

**873 respondents answered this question.*

- 82.5% yes
- 17.5% no

In 2008, 79.2% of employees responded "yes" to this question which reaffirms positive growth for the business climate downtown.

11. What do you like about having your place of employment Downtown? (Respondents could check top two choices)

**712 respondents answered this question.*

- 40.7% like proximity to the waterfront (river)
- 40.6% like atmosphere/ambiance of downtown (The Downtown Setting)
- 38.5% like convenience to my home
- 34.4% like events
- 33.0% like variety of restaurants
- 32.7% like proximity to trails and other outdoor activities
- 26.5% like convenience to services I use
- 15.0% like proximity to the Brown County Library
- 8.4% Other
- 7.2% like variety of other services
- 0.6% don't like working downtown

12. What don't you like about having your place of employment downtown? (Respondents could check top two choices)

**156 respondents answered this question.*

- 46.2% think it is not convenient to services they use
- 43.6% think not enough variety of restaurants
- 40.4% think not enough variety of other services
- 35.3% think it is not convenient to their home
- 32.7% think atmosphere/Ambiance (The Downtown Setting)
- 28.2% Other
- 6.4% think not enough events
- 1.9% think not close enough to trails and other outdoor activities
- 1.3% think not close enough to the waterfront (river)
- 1.3% I like working downtown
- 0.0% think not close enough to the Brown County library

13. How long is your lunch hour?

**869 respondents answered this question.*

- 35.4% flexible
- 32.2% 1 hour
- 26.2% 30 minutes
- 3.7% do not have a lunch hour
- 2.4% other

14. Which activities best describe what you do during your lunch hour? (Respondents could check up to two activities.)

**869 respondents answered this question.*

- 59.3% brown bag/at office
- 29.5% run errands
- 28.8% exercise
- 25.2% business lunch
- 14.5% fast food
- 12.1% other
- 10.2% go home

*******Percentages do not add up to 100% due to the multiple options respondents could choose. Percentages listed represent the number of respondents who chose each individual category.*

15. What do you think are downtown Green Bay's strengths? (Respondents could check all that applied)

**1,633 respondents answered this question.*

- 82.6% waterfront/Fox River
- 70.6% Fox River Trail/outdoor recreation opportunities
- 46.8% Meyer Theatre
- 41.9% events/entertainment
- 41.7% dining
- 35.3% Brown County Library
- 28.2% Neville Public Museum
- 26.3% cleanliness
- 23.3% safety
- 22.5% history/architecture
- 21.0% pedestrian friendliness
- 16.5% shops/galleries/retail
- 15.7% parking
- 12.4% bicycle friendliness
- 11.5% business climate
- 10.5% momentum
- 10.5% greenspace
- 6.9% other

Similar to 2008 responses, City leaders and planners can be reassured waterfront development is important to the community and continued development and promotion of that area is a good use of resources.

16. In what ways do you think downtown Green Bay has the opportunity to improve? (Respondents could check all that apply)

**1,644 respondents answered this question.*

- 74.5% think shopping/retail
- 65.8% think services (grocery store, dry cleaner, etc.)
- 39.8% think development/vacancies
- 37.0% think dining
- 34.8% think events/entertainment
- 31.4% think family friendliness
- 31.4% think parking
- 30.2% think safety
- 26.6% think greenspace
- 22.9% think live music
- 22.4% think business climate
- 22.6% think cleanliness

- 21.4% think bicycle friendliness
- 19.8% think pedestrian friendliness
- 12.5% other
- 12.2% think momentum

Again similar to 2008, there is a clear need for additional retail and service amenities like a grocery store. Efforts like New Leaf Market were not fully active during the 2008 survey but are clearly a worthwhile based on survey interest.

17. What businesses or services that are not currently available downtown would you like to see represented?

**UWGB analyzed 1016 open-ended responses for this question and the following:*

- 36% of comments listed daily conveniences/services (i.e. grocery store, convenience, pharmacy)
- 26.3% of comments listed some sort of retail
- 16.3% of comments listed additional dining
- Remaining comments included small percentages about entertainment, business, amenities, events, recreation, beautification, residential and transportation options.

Based on some of the suggestions, like the need for pharmacy, there is a need for additional marketing of existing businesses like Streu's Pharmacy Bay Natural on Main and Monroe and CVS on Main and Webster.

18. Have you attended any of the following events in downtown Green Bay? (Respondents could check all that apply)

**1,628 respondents answered this question.*

- 75.5% attend Farmers Market on Broadway
- 75.4% attend other festivals & events
- 64.4% attend Green Bay Farmers Market
- 38.2% attend Nicolet Bank's Dine on the Deck
- 32.4% attend Summer in the Park
- 19.5% attend Fridays on the Fox presented by Koko Sushi Downtown
- 18.6% attend Leicht at Nite
- 9.3% attend Live on Main
- 4.9% have not attended any of the events listed

19. What other special events would you suggest for downtown Green Bay?

**362 respondents answered this question UWGB summarized the following trends:*

- 34.8% of comments mentioned wanting more event shows or festivals (i.e. concerts, ethnic festivals, food, etc.)
- 9.7 % of comments listed specific event ideas such as Oktoberfest, Cheese Festival, etc.
- Remaining comments varied and included suggestions for time/date of current events, utilization of venues, music suggestions, parades and more.

2008 data from this same question was used to create events such as Nicolet Bank's Dine on the Deck, Associated Bank's Fridays on the Fox, Live on Main and Savour Green Bay. UWGB student analyst Kaitlyn Gilles said many new event ideas mentioned were already existing and believes better marketing of the existing events would address many of the suggestions.

20. Would you shop at a downtown grocery store?
**1,646 respondents answered this question.*

- 43.6% weekly
- 17.3% monthly
- 17.6% other
- 12.9% never
- 4.7% daily
- 4.1% yearly

UWGB analyzed the 17.6% who chose other and found many would if a number of contingencies were met including affordability, selection, location and type of store to name a few examples.

21. Would you like to be contacted by New Leaf Market Co-op? An initiative to bring a full-service, member-owned, cooperative grocery store featuring local, healthy and fair-priced food for the community to downtown Green Bay.
**1,433 respondents answered this question.*

- 74.1% no
- 25.9% yes

In August 2011, the time of the survey start, New Leaf Market had 368 members and has since added 132 members to now put them at 500.

22. Please share any additional thoughts, comments or suggestions you may have regarding downtown Green Bay.
UWGB analyzed 551 comments which were varied on many topics. 162 comments reflected that downtown is moving in the right direction and others focusing on needs brought up in other areas of the survey such as a grocery store, improved parking, etc.