



City of Poway- Redevelopment Agency Shopping Habits Survey

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Executive Summary

Our Senior Experience Team was assigned to assist the Redevelopment Agency of Poway in conducting a community-wide survey to better understand the local shopping behaviors of its residents. We created a survey that consisted of questions about local shopping behaviors as well as opened-ended questions that allow the residents to give their opinion. To distribute the survey we prepared a mail survey with the option of completing the survey via the Internet or returning it in a prepaid self-addressed stamped envelope. We chose a mail survey because it was the most unbiased, the City of Poway has had lower than average response rates in the past with webpage surveys, and their average population is highly educated, which increases the return rate.

The sample size was selected based on the population of the City of Poway and was distributed using the simple random sampling method. With the City's population consisting of 16,000 households, and with a confidence level of 95% and a confidence interval of 5, the sample size suggested to represent the population with reasonable accuracy was 375 households. With an estimated response rate of 5%, we mailed 7,500 surveys in order to obtain a sample size of 375 completed surveys. We received more than 2,000 completed surveys, including both mail and online, which is a response rate of about 27%. Out of those 2,000 surveys the team analyzed 823 and found this to be statistically sufficient.

Our results concluded that 70% of the residents shop regularly in the City of Poway, and that when residents choose not to shop in Poway, the majority of these residents feel it is due to the limited selection that Poway has to offer. We also found that of the respondents who would not purchase a car at the Poway Road of Cars, 67% said it was due to the minimal brand selection and high, non-competitive prices. We also conclude that 63% of the respondents feel Poway lacks restaurants, apparel, and entertainment.

There were 622 responses for specific stores, and the majority of the responses, totaling 13%, asked for a Trader Joes. Six percent of the responses requested a Lowe's and Super Wal-Mart. We determined that a total of 5.5% of residents requested a bookstore (Borders or Barnes & Noble).

There were 419 responses for specific restaurants, and three of the top ten were in the fast food class. These restaurants include: In-N-Out as the first choice of residents with 29 requests, Arby's received 25 requests, and Wendy's had 22 requests. Fast casual dining was requested by 52% of the respondents, and a total of 27% of the residents asked for more upscale dining.

When asked, "What would cause you to do more shopping in Poway", which was an open-ended question, most of the responses were similar, so we categorized the responses into 12 different categories. Out of those 12 different categories, the most prominent responses were: quality shops and restaurants, more options and selections, and upscale or independent businesses.

Lastly, we determined that 75% of Poway residents already do most of their shopping within Poway. Fourteen percent will start shopping more in Poway once they realize that dollars spent in Poway benefit them and 11% will not change their shopping habits. This means that if the "Shop Poway" campaign is successful, 89% (75% already do + 14% who will start) of all Poway residents will be doing most of the shopping within Poway.

We recommend attempting to attract the following restaurants and stores: More fast casual dining restaurants, a few upscale restaurants, an In-N-Out, Arby's, Wendy's, Trader Joes, Lowe's, and a bookstore. We also recommend going forward with the "Shop Poway" campaign because it has the potential to increase the percentage of residents who shop mostly within the City of Poway from 75% to 89%.

Introduction

Our Senior Experience Team (team) was assigned to assist the Redevelopment Agency of Poway in conducting a community-wide survey to better understand the local shopping behaviors of its residents. The survey will enable the City's Redevelopment Agency to help identify why money flows elsewhere, thus effecting their city funding through sales tax revenue. Since sales tax revenues represent approximately 35% of the City's General Fund, and is used to help pay for services including public safety, streets, and parks, the City would like to gain this indispensable knowledge so they can better understand the needs of local residents. By knowing what the residents want and need, the City can implement projects to satisfy their needs while improving sales revenue and City funding. The team also included a brief description informing the residents of how shopping in Poway helps support the City.

Given these objectives set by the City's Redevelopment Agency, the team formulated a survey that consisted of questions about local shopping behaviors as well as opened-ended questions that allow the residents to give their opinion. The survey (which will be explained in detail later) has been administered by mail to a random selection of the population so that our analysis is unbiased and widespread.

Methodology

To administer a community-wide shopping habits survey the team prepared a mail survey with the option of completing the survey via the Internet or returning it in a prepaid self-addressed stamped envelope. This was decided because mail surveys are among the least expensive; they can easily be administered with the assistance of a mailing service, and allows the respondent to answer at their leisure, which doesn't intrude on the privacy of the respondent (Pearson, Mail/Paper Survey). However, the disadvantage with mail surveys is they require

a longer response time and there is a possibility of a low response rate, usually with populations that are lower educated. Mail surveys receive their best response rates from “highly educated people and people who have a particular interest in the subject” (Creative Research Systems, Mail Surveys). Ultimately, a mail survey was determined to be the best method because it was the most unbiased, the City of Poway has had lower than average response rates in the past with webpage surveys, and their average population is highly educated. We decided to allow the respondent an option to directly access the survey via the City’s homepage, which allows them to see the legitimacy of the survey, could increase the survey response rate, and allows a faster response time.

The sample size was selected based on the population of the City of Poway, an appropriate confidence interval and confidence level for the population, and the likely response rate. With the Poway population of 16,000 households, a confidence level of 95% and a confidence interval of 5, the sample size suggested to represent the population with reasonable accuracy was 375 households. The normal rate of return for mail surveys is 3-5 percent (City of Santa Clarita). The team decided that the likely response rate of 5% would be appropriate. To obtain a sample size of 375 completed surveys with a response rate of 5% we needed to mail 7,500 surveys.

The sampling scheme was simple random sampling, where every possible sample has the same likelihood of being selected. Post Haste Mail Services conducted the simple random sample of the City of Poway residents. They randomly chose 7,500 households out a database of all Poway mailing residents. Post Haste also printed, prepared, and mailed the surveys.

The physical appearance of the survey consisted of a one page duplex sheet printed on white paper with black ink. The survey was mailed in a #10 envelope which was addressed directly to the resident’s name and included a return address with the City of Poway’s logo and the official City address; these were

both printed on the envelope in black ink. We included a #9 prepaid return envelope within the survey to make it more convenient for the residents to return the survey. The team decided on these precise specifications in order to increase the response rate.

The actual survey consisted of eleven questions with a brief description of how shopping in Poway helps support the City. The content of the survey was determined based on the underlying goal, gaining more of a complete understanding of the shopping and spending habits of the City's residents. The survey began with simple questions that asked where the residents shop, and if the City is currently satisfying their shopping needs. Then the survey goes into specifics about what residents think Poway lacks or needs and allows them to list specific stores they wish were located in Poway. It gave them the opportunity to respond about what would make them shop more in Poway and ends with an explanation of the importance of shopping in Poway. The survey met the end goal of understanding the shopping habits of the residents and went beyond by allowing the respondents to give detailed responses. For more details on the content of the survey refer to Appendix page 38.

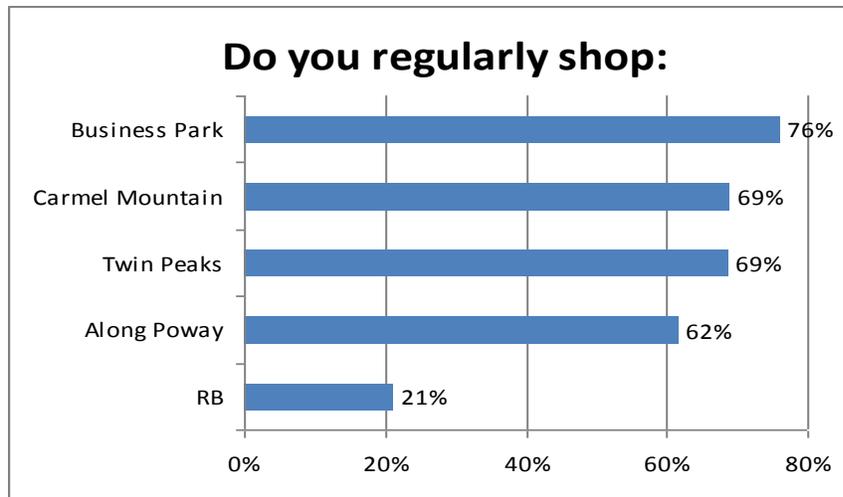
Results

We received more than 2,000 surveys, including both mail and online, which is a response rate of about 27%. Out of those 2,000 surveys the team analyzed 823 surveys. After testing for a statistical difference between three different batches, two of them were from mail surveys, which were received at different periods, and the third was from the responses online, we determined that there was an insignificant statistical difference between the batches. Concluding, that the 823 surveys captured the appropriate data and no further testing was needed.

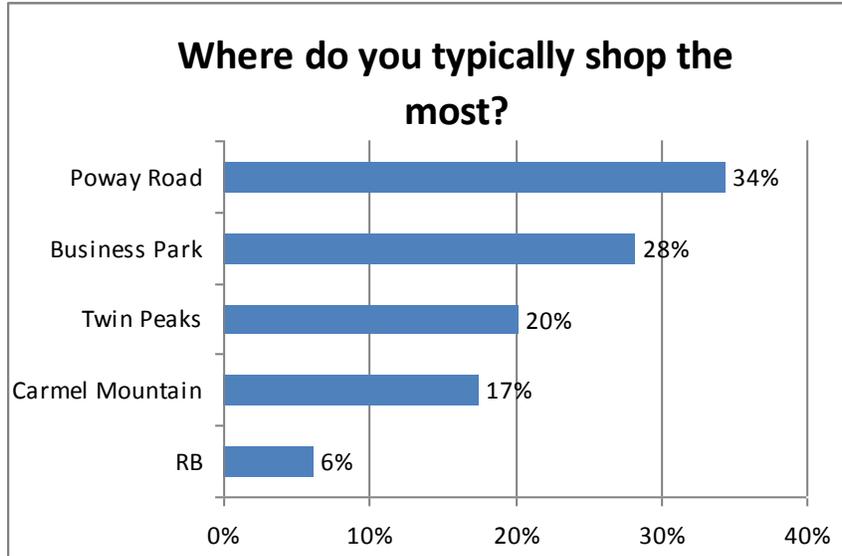
The following graphs/responses were analyzed by determining the total number of each response divided the total number of respondents. Some of the survey

questions allowed the respondent to choose more than one response, thus resulting in some of them receiving more than a total of 100%.

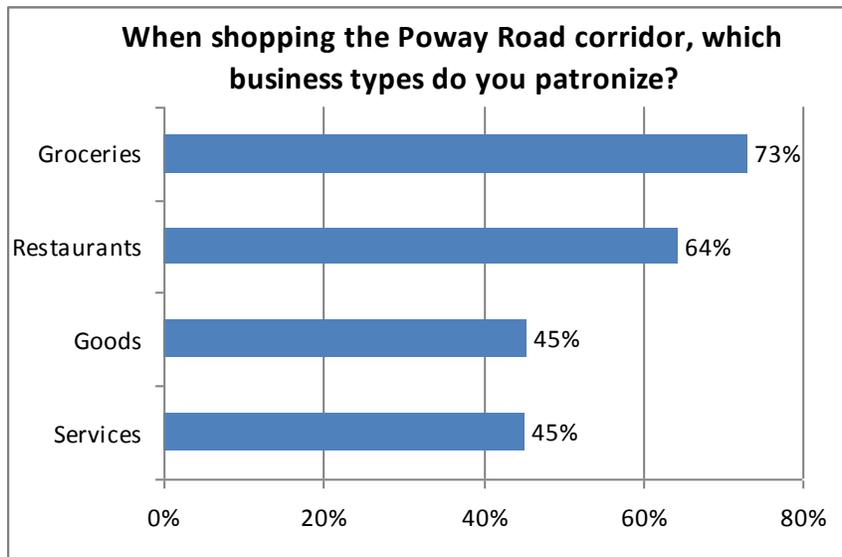
Through the analysis of the 823 surveys, our team concluded that 70% of the residents shop regularly in the City of Poway (this includes Business Park, Twin Peaks, and Along Poway). This was determined by taking the percentage of people who shop in Poway, which is 207%, divided by the total percentage of responses, which is 297%. The majority of residents shop regularly in Poway's Business Park, with 76%.



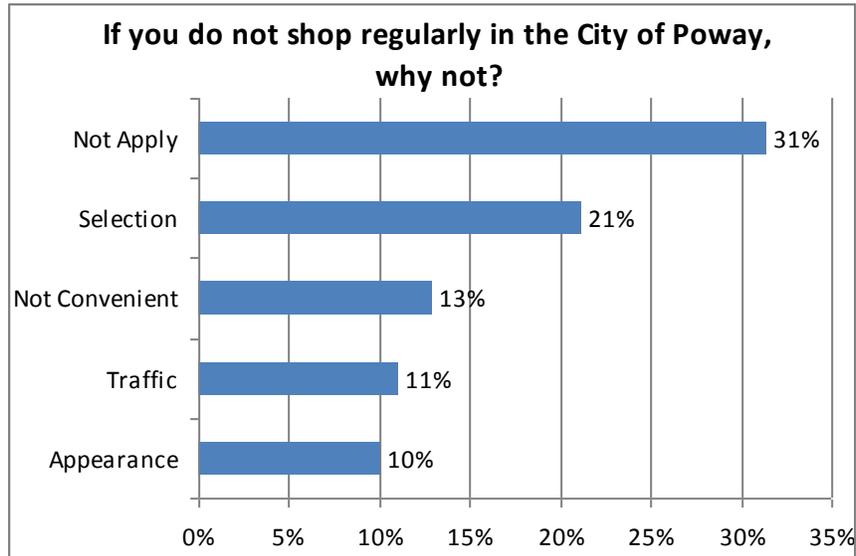
Furthermore, our team determined that a majority of the respondents typically shop most along Poway Road and in the Poway Business Park. We also established that 20 - 25% of the population typically shops mostly outside of Poway, concluding that around 75 – 80% shop mostly within Poway. Carmel mountain Ranch and Rancho Bernardo (RB) are not in the City of Poway. (Table on next page)



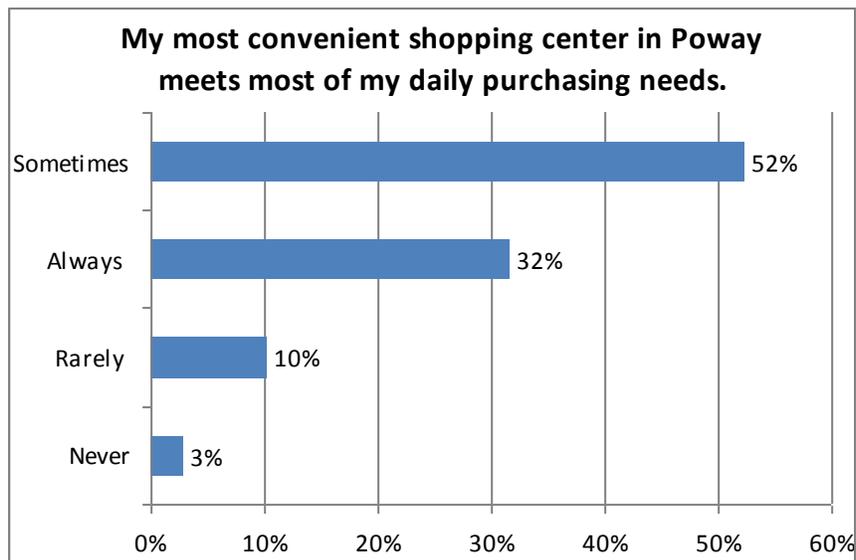
When asked what types of business' residents patronize while shopping along the Poway corridor, grocery stores and restaurants were the most supported by the population.



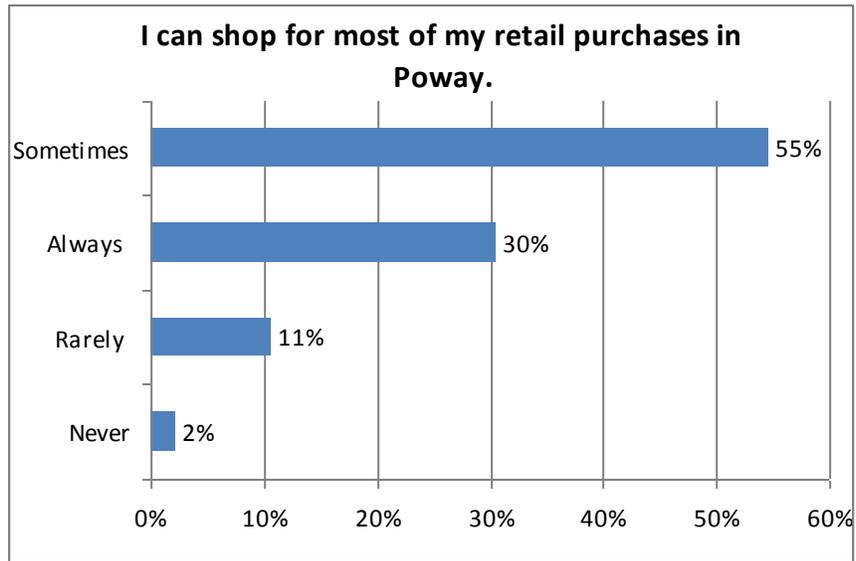
When residents were asked why they did not shop in Poway, an overwhelming majority chose, “Does not apply”. This is because the majority of the respondents already shop in Poway. Of the residents that did not shop in Poway, the most chosen answer was the selection that Poway had to offer.



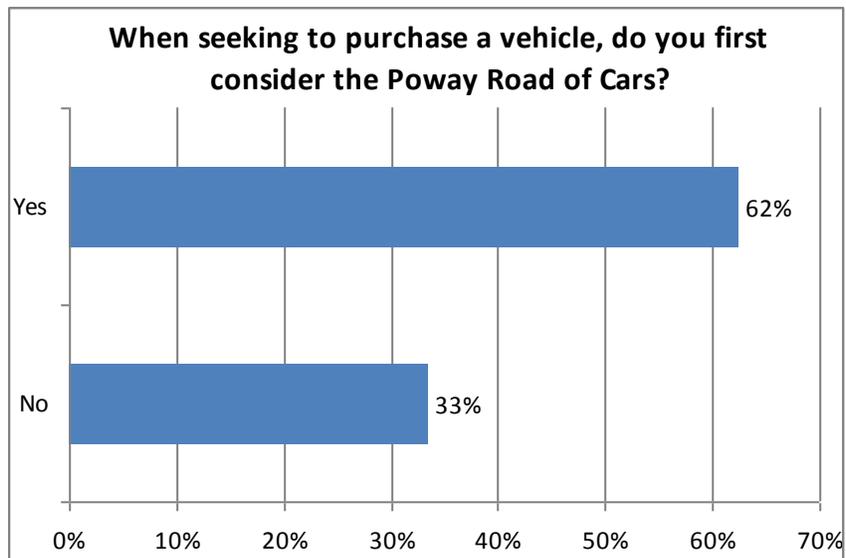
In the following question, the team concluded that 84% of the respondents decided that their most convenient shopping center meets most of their daily shopping needs either sometimes or always, with the majority selecting sometimes.



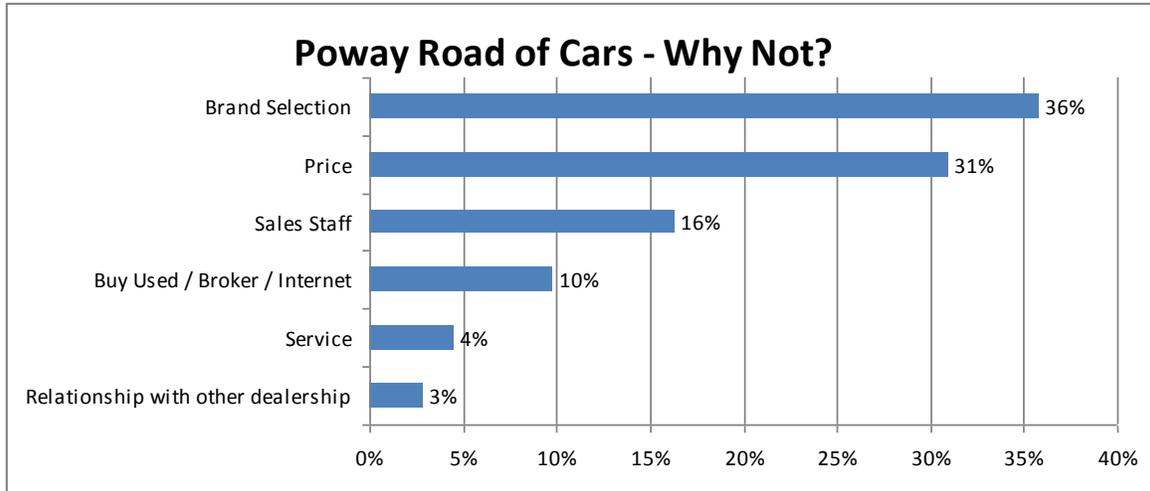
Next, 85% of the respondents replied that they are able to shop for most of their retail purchases either sometimes or always in the City of Poway, with 55% selecting sometimes



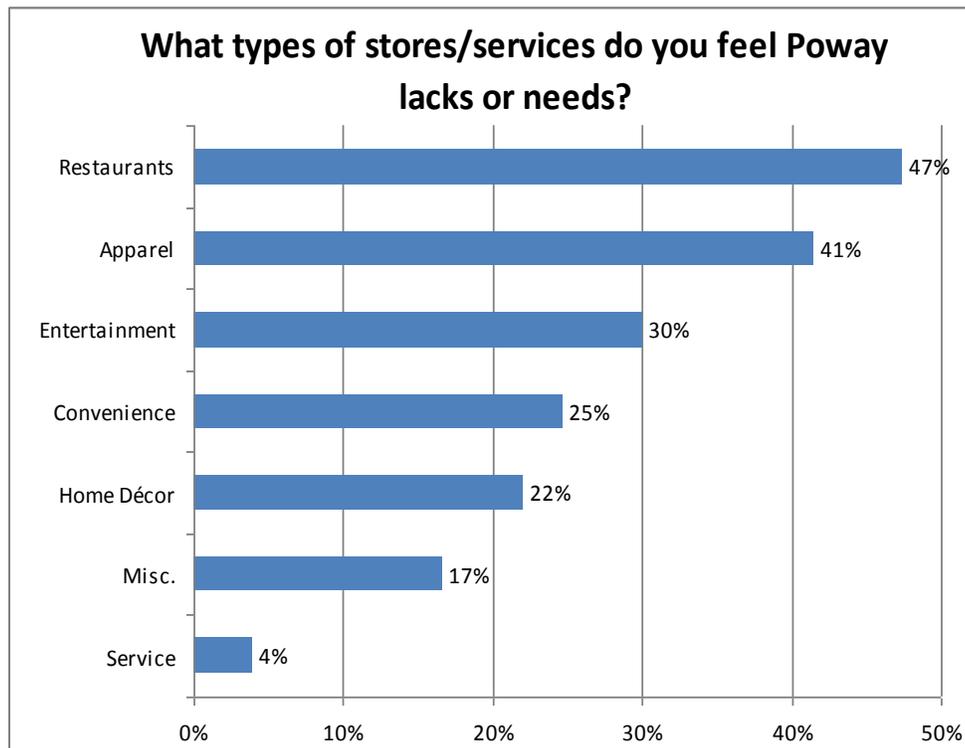
When analyzing whether respondents first considered Poway Road of Cars to purchase a vehicle, our team found that nearly two-thirds said they first consider Poway Road of Cars.



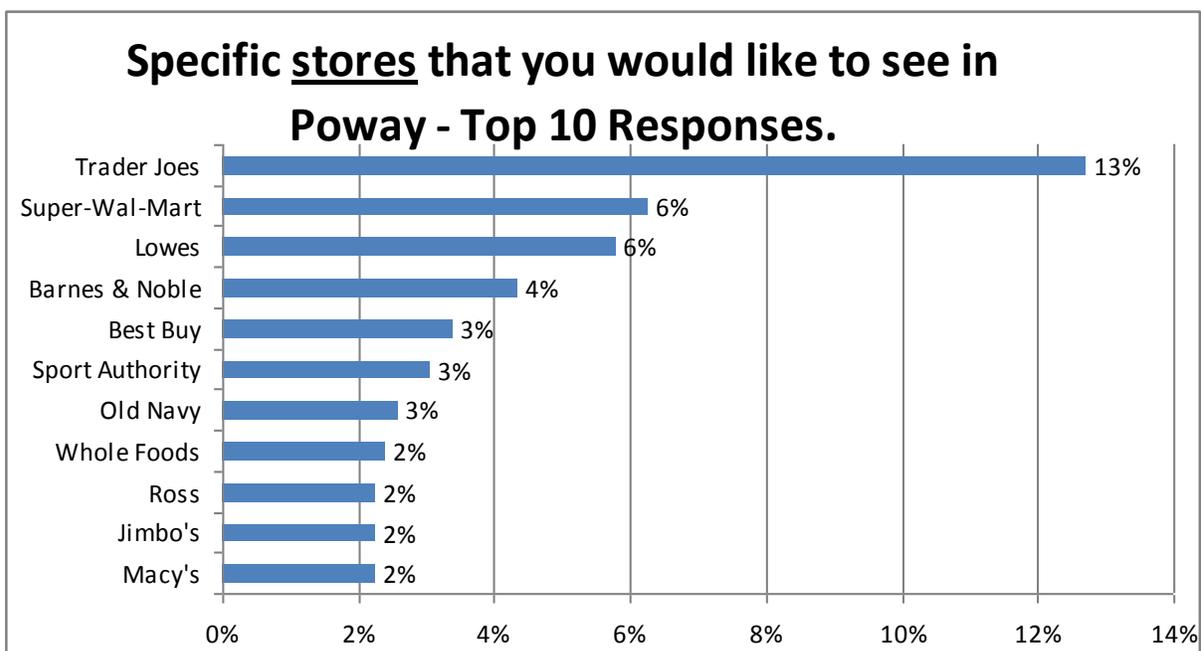
We found that 67% of the respondents, who answered no, would not consider Poway Road of Cars due to minimal brand selection and high (non competitive) prices.



Of the stores and services that residents feel Poway lacks or needs, our team found that 63% of the respondents feel Poway lacks restaurants, apparel, and entertainment. One out of every four responses selected “Poway lacks or needs restaurants”.

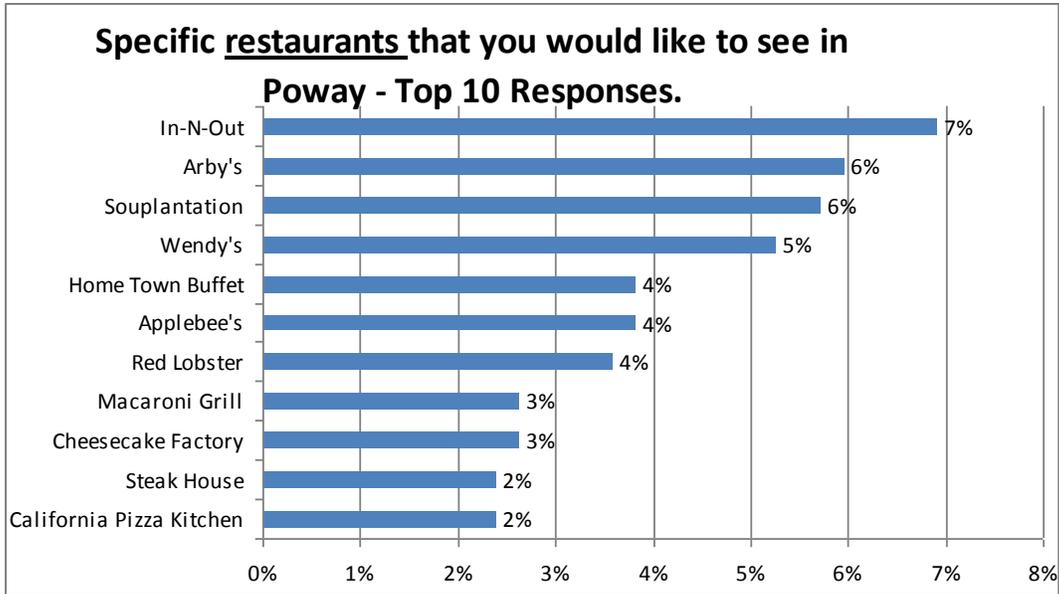


Out of the 622 responses for specific stores, an overwhelming majority of 79 residents asked for a Trader Joes, which is 13% of all the responses for specific stores. An average of 35 to 40 residents suggested a Lowe's and Super-Wal-Mart; this is 6% of the responses. Four percent of residents asked for a Barnes & Noble and another 1.5% asked for a Borders, concluding that 5.5% of residents requested a bookstore. The remaining top 7 stores, received between 15 and 25 requests for placement within the city. For a complete list of the stores that were requested by the residents please see Appendix page 24.

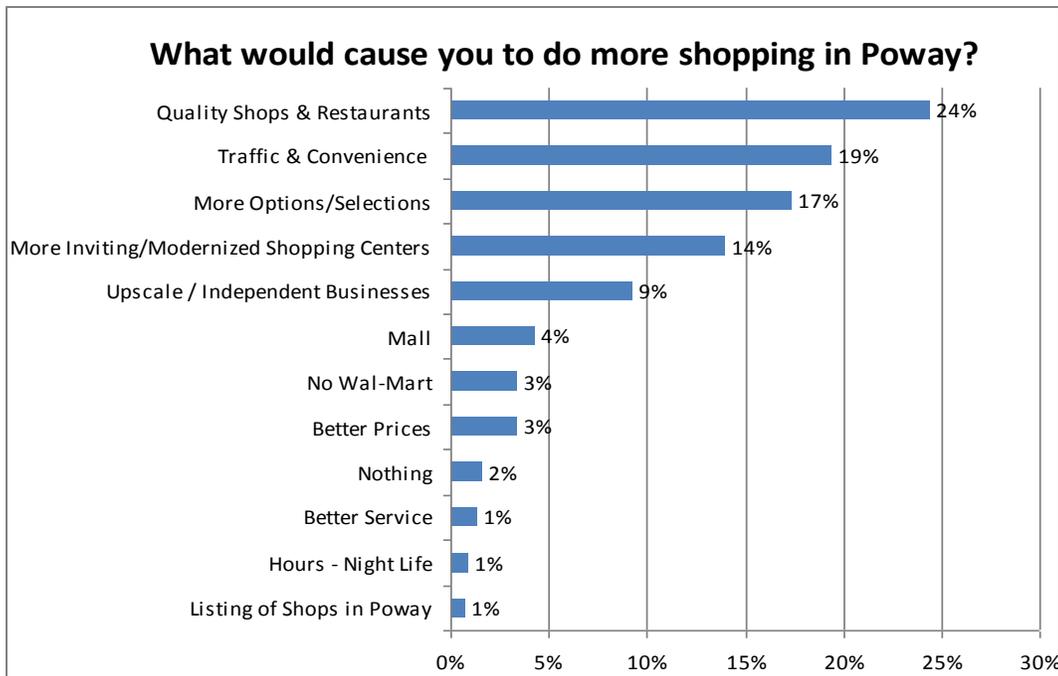


Our team decided to categorize the specific restaurants that were requested by the residents into three categories: Fast food restaurants, fast casual dining, and upscale dining. Of these three categories, fast casual dining was the most requested, by obtaining 52% of the residents' requests. Among the top fast casual restaurants was: Souplantation, Home Town Buffet, Applebee's, and California Pizza Kitchen. A total of 27% of the residents asked for more upscale dining, which included: Red Lobster, Macaroni Grill, Cheesecake Factory, and Steak Houses. Lastly, 21% of the residents would like to see more fast food restaurants in Poway. The most requested fast food restaurants were: In-N-Out,

Arby's, and Wendy's, respectively. For a complete list of the restaurants that were requested by the residents please see Appendix page 26.



What would cause you to do more shopping in Poway was an open-ended question, which we categorized the responses into 12 different categories. Out of those 12 different categories, the most prominent responses were: Quality shops and restaurants, more options and selections, and upscale or independent businesses. Of those three, one out of every four responses indicated that Poway needs quality shops and restaurants. However, 33% of respondents feel they would shop in Poway if the shopping areas were more convenient and traffic was smoother, and the shopping centers were modernized and more inviting. (Table on next page)



Residents who chose Rancho Bernardo as their primary shopping destination chose “Inconvenience” as the dominant reason for not shopping in Poway. Residents who shop in Carmel Mountain Ranch the most do so because Poway does not have the selection prefer.

Why they don't shop in Poway	RB the Most	CMR the Most
Inconvenience	51%	29%
Selection	29%	40%
Traffic	22%	22%
Appearance	18%	21%

Residents who shop mostly in Rancho Bernardo and Carmel Mountain Ranch feel Poway:

- Rarely or never meets most of their retail purchases by more than double that of the total sampled population.
- Always meets most of their retail purchases by less than 50% of the total sampled population. (Table on next page)

	Total Sampled Population	RB & CMR Shoppers	Difference
Never	2%	6%	+4%
Rarely	11%	26%	+15%
Always	31%	13%	-18%

By analysis, 33% of residents responded “No”, when asked if knowing that Poway dollars directly benefit its residents will effect where they shop. This means that the “Shop Poway” campaign will not have an affect on 33% of residents. Of those that say the campaign will not affect them, 22% of them already shop mostly in Poway. Concluding, that the “Shop Poway” campaign will not affect the shopping habits of 11% of residents.

However, 14% of residents who do not do most of their shopping within Poway responded that if they knew the benefits of shopping in Poway it would affect where they shop. Concluding, that an effective “Shop Poway” campaign has the potential to increase the percentage of residents who mostly shop in Poway by 14%.

What this means overall is that, 75% of Poway residents already do most of their shopping within Poway. Fourteen percent will start shopping more in Poway once they realize that dollars spent in Poway benefit them and 11% will not. This means that if the “Shop Poway” campaign is successful, 89% (75% already do + 14% who will start) of all Poway residents will be doing most of the shopping within Poway.

	Said No	% of No	Said Yes	% of Yes	Total	Total %
Total Respondents	269	33%	527	67%	796	100%
Shop Most in Poway	175	22%	415	53%	590	75%
Shop Most in CMR or RB	94	11%	112	14%	206	25%

Conclusion and Recommendations

The purpose of this report was to better understand the shopping habits of Poway residents, determine what residents want located in Poway, and to help the City understand why money flows elsewhere. Based on the survey's findings and analysis the team can make the following conclusions:

The survey results confirm that nearly 70% of the residents already shop regularly within the City of Poway. This is a compelling statistic and proves that the majority of residents do in fact already shop in Poway.

The results also conclude that an effective "Shop Poway" campaign has the potential to increase the percentage of residents who mostly shop in Poway by 14%. Meaning with a successful campaign, 89% of all Poway residents will be mostly shopping in Poway.

Next, the results confirm that one out of every four respondents said they would shop more in Poway if they had more quality shops and restaurants.

Furthermore, the respondents asked for the following specific stores/restaurants:

- The most requested store, Trader Joes, received 13% of all store responses. This is significant because respondents were allowed to suggest any store they felt Poway lacked and the most popular recommendation was Trader Joes.
- 6% of respondents felt that Poway lacked a Lowe's and another 4% felt that Poway lacked a Barnes & Nobel. Not only did residents ask specifically for a Barnes & Nobel; however, 5.5% of the respondents felt Poway needed a bookstore in general.
- Although Super Wal-Mart received 6% of the responses, it did receive several negative responses in the final open-ended question in the survey.

- 52% of the residents asked for additional fast casual dining restaurants, 27% would like to see more upscale restaurants, while 21% of the residents requested more fast food restaurants to be located in Poway.

Traffic and convenience was the second most recurring response to what would make residents shop more in Poway. Nineteen percent of the residents feel they would shop more in Poway if it were easier to access the shops.

The team received over 2,000 mail surveys from the administered 7,500 surveys. Concluding that this survey received over a 27% response rate, which shows that the method chosen to administer this survey was a success. For future surveys, the team recommends the methods used in this survey.

Lastly, we recommend attempting to attract the following restaurants and stores: More fast casual dining restaurants, a few upscale restaurants, an In-N-Out, Arby's, Wendy's, Trader Joes, Lowe's, and a bookstore. We also recommend going forward with the "Shop Poway" campaign because it has the potential to increase the percentage of residents who shop mostly within the City of Poway from 75% to 89%.

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APPENDIX

Relationships

Relationship of residents who shop in RB the most (#2) and why they don't regularly shop in Poway (#4).

Not Convenient	51%
Selection	29%
Traffic	22%
Appearance	18%

Relationship of residents who shop in Carmel Mountain Ranch the most (#2) and why they don't regularly shop in Poway (#4).

Selection	40%
Not Convenient	29%
Traffic	22%
Appearance	21%

Relationship of residents who shop in CMR or RB the most (#2) and said they did because of selection (#4) - what do they feel Poway lacks (#9).

Restaurants	64%
Apparel	61%
Convenience	39%
Entertainment	29%
Home Décor	20%
Misc.	19%
Service	3%

Relationship of residents who shop in Poway the most (#2) compared to if they would buy a car in Poway (#8).

Yes	66%
No	30%

Relationship of residents who shop in CMR or RB the most (#2) compared to if they would buy a car in Poway (#8).

Yes	51%
No	43%

Relationship of residents who shop the Corridor the most (#2) and the business type they patronize (#3).

Groceries	98%
Restaurants	73%
Goods	58%
Services	53%

Relationship of residents who shop in Poway the most (#2) and if their most convenient shopping center meets most of their daily needs (#5).

Sometimes	53%
Always	38%
Rarely	6%
Never	1%

Relationship of residents who shop in RB or CMR the most (#2) and if their most convenient shopping center meets most of their daily needs (#5).

Sometimes	51%
Rarely	22%
Always	14%
Never	7%

Relationship of residents who shop in Poway the most (#2) and if they are able to shop for most of their retail purchases in Poway (#6).

Sometimes	56%
Always	36%
Rarely	5%
Never	1%

Relationship of residents who shop in RB or CMR the most (#2) and if they are able to shop for most of their retail purchases in Poway (#6).

Sometimes	49%
Rarely	26%
Always	13%
Never	6%

Relationship of residents who shop in Poway the most (#2) and the affect on where they shop if knowing dollars spent in Poway benefits them (#7).

Yes	70%
No	30%

Relationship of residents who shop in RB or CMR the most (#2) and the affect on where they shop if knowing dollars spent in Poway benefits them (#7).

Yes	54%
No	46%

Relationship of residents who shop in RB or CMR the most and chose selection (#4) as to why they did not shop in Poway compared what they think Poway lacks (#9).

Restaurants	67%
Apparel	55%
Convenience	34%
Entertainment	34%
Home Décor	23%
Misc.	17%
Service	3%

Relationship of residents who said their shopping center (#5) rarely or never meets their needs compared to what Poway lacks (#9).

Restaurants	59%
Apparel	42%
Entertainment	31%
Convenience	29%
Home Décor	24%
Misc.	15%
Service	5%

Relationship of residents who said they can rarely or never shop for their retail needs in Poway (#6) compared to what Poway lacks (#9).

Restaurants	61%
Apparel	48%
Convenience	30%
Entertainment	30%
Home Décor	24%
Misc.	14%
Service	5%

List of Specific Stores Requested

<u>Store Name</u>	<u>No. of Responses</u>	<u>Store Name</u>	<u>No. of Responses</u>
Trader Joes	79	Home Depot	3
Super-Wal-Mart	39	Honey Baked Ham	3
Lowe's	36	IKEA	3
Barnes & Noble	27	Jerome's	3
Best Buy	21	K-Mart	3
Sport Authority	19	Nordstrom's Rack	3
Old Navy	16	Pier 1	3
Whole Foods	15	See's Candy	3
Macy's	14	Tilly's	3
Jimbo's	14	Apparel Store	2
Ross	14	Babies R Us	2
Fry's Electronics	13	Comp USA	2
Sears	13	El Tigre Grocery	2
JC Penny's	11	Forever 21	2
Nordstrom	11	Hobby People / Shack	2
Plowboys Market	11	Mall	2
99 Cent / Dollar Store	10	No Super Wal-Mart	2
Big 5	10	Outlet Stores	2
Marshall's	10	Party City	2
TJ Max	10	Pets Mart	2
Bed Bath & Beyond	9	REI	2
Home Furnishing	8	Shoe Store	2
Black Angus	7	Steinmart	2
Borders	7	Target Greatland	2
Circuit City	7	The Gap	2
Toys R Us	7	Williams Sonoma	2
Longs Drugstore	5	Aaron Brothers	1
Payless shoes	5	Anchor Blue	1
Pottery Barn	5	Ann Taylor Loft	1
Ralph's Grocery Store	5	Anna's	1
Bath & Body Works	4	Aveda	1
Crate & Barrel	4	Bait & Tackle Store	1
Linens-n-things	4	Banana Republic	1
Mervyn's	4	Barons market	1
Smart & Final	4	Beauty Supply	1

*See following page for more stores.

<u>Store Name</u>	<u>No. of Responses</u>	<u>Store Name</u>	<u>No. of Responses</u>
Big Boy	1	Metropolis	1
Big Lots	1	Organic Food Store	1
Blockbuster	1	PC Electronics	1
Bloomingdales	1	Pep Boys	1
Building Supply	1	Porsche	1
Burlington Coat Factory	1	Produce Market	1
Byerly's	1	Radio Shack	1
Camera Shop	1	RV Parts and Supplies	1
Camping World	1	Sam's Club	1
Capezio	1	Sass Shoe Store	1
Charlotte Russe	1	Sephora	1
Chicks Sporting	1	Soccer Post	1
Chico Clothing	1	Specialty Grocery	1
Chinese Market	1	Starbucks	1
Christian Bookstore	1	Stater Bros.	1
Clothing Stores	1	Sun Diego	1
Computer Store	1	Sur Le Table	1
Container Store	1	Surf Shop	1
Cost Plus World Market	1	Talbot's	1
Dept Store	1	Teacher Supply	1
Dress Barn	1	Tesco	1
Farm Supply Store	1	The Dress Barn	1
Farmers Brothers	1	The Habit	1
Food 4 Less	1	Tip Top Market	1
Foot Locker	1	Tom's	1
Good Guys	1	True Value / Ace Hardware	1
Grocery Store	1	Trunners	1
Gun/Knife Dealer	1	Ulta	1
Harvest Farms Market	1	Upscale Retail Centers	1
High-end Dealership	1	Vans	1
Hostess Bakery Outlet	1	Vegan Market	1
Illuminations	1	Victoria's Secret	1
Image	1	Video Store	1
Lane Bryant	1	Vons	1
Leather Goods	1	Wegmans	1
Lincoln dealership	1	Women's Clothing Boutique	1
Mexican Meat Store	1	Yardage Town	1

List of Specific Restaurants Requested

<u>Restaurant Name</u>	<u>No. of Responses</u>	<u>Restaurant Name</u>	<u>No. of Responses</u>
In-N-Out	29	Anthony's	3
Arby's	25	Fish & Chips	3
Souplantation	24	Miami Grill & Pasmir	3
Wendy's	22	Panda	3
Applebee's	16	Popeye's Chicken	3
Home Town Buffet	16	Sammy's Wood Fire Pizza	3
Red Lobster	15	Trophy's	3
Cheesecake Factory	11	Upscale Restaurants	3
Macaroni Grill	11	Wings & Things	3
California Pizza Kitchen	10	BJ's Brewery	2
Steak House	10	Brewery	2
Chili's	8	Buca De Beppo	2
P.F. Chang's	8	Chick fillet	2
Black Angus	7	Chinese buffet	2
Bruegger's Bagels	7	El Torito	2
Seafood Restaurant	7	Fidel's	2
Mimi's Café	6	Fuddruckers	2
El Pollo Loco	5	Marie Calendars	2
Fish Market	5	Outback	2
Oggie's	5	Phil's Barbeque	2
Panera Bread	5	Restaurant Row	2
Red Robin	5	Ruby's Diner	2
Sizzler	5	The Barrel Room	2
BBQ restaurant	4	Acapulco's	1
Claim Jumper	4	Baja Fresh	1
Dairy Queen	4	Bakers Square	1
Island's	4	Better Restaurants	1
Long John Silver	4	Boll Weevil's	1
Mexican Restaurant	4	Bread Bakery	1
Olive Garden	4	Brigantine	1
On the Border	4	Bullwinkle's	1
Pat & Oscars	4	Chevy's	1
Road House Bar & Grill	4	Chipotles	1
Sonic	4	Chuck E Cheese	1
TGI Friday's	4	CiCi's Pizza	1

*See following page for more restaurants.

<u>Restaurant Name</u>	<u>No. of Responses</u>	<u>Restaurant Name</u>	<u>No. of Responses</u>
Cinnabon	1	Little Italy Hash House	1
Coco's	1	Major Market	1
Coffee Bean	1	Oriental Restaurant	1
Cracker Barrel Restaurant	1	Peet's Coffee & Tea	1
Dim Sum Restaurant	1	Pizza Hut	1
Einstein Bagels	1	El Pollo Loco	1
Ethnic Food	1	Red Brick Oven Pizza	1
Family Restaurants	1	Sam's Cheesecake	1
Flemings	1	Spaghetti Factory	1
French bakery café	1	Spices Tai	1
Fresh & Easy Neighborhood Market	1	Stir Fresh	1
German Restaurant	1	Sur La Tab	1
Gordon Birsch	1	Tio Leos (Mexican Food)	1
Health Food Restaurants	1	Togo's	1
Hooters	1	Tony Roma's	1
Italian Restaurant	1	Unique Restaurants	1
Japanese Restaurant	1	Vegetarian Restaurant	1
Joe's Crabshack	1	Vince's Spaghetti	1
Krispy Crème	1	Wetzel's Pretzels	1
L BBQ	1	Wine Bar	1
La Peeps	1	Yanni's	1

List of Specific Services Requested

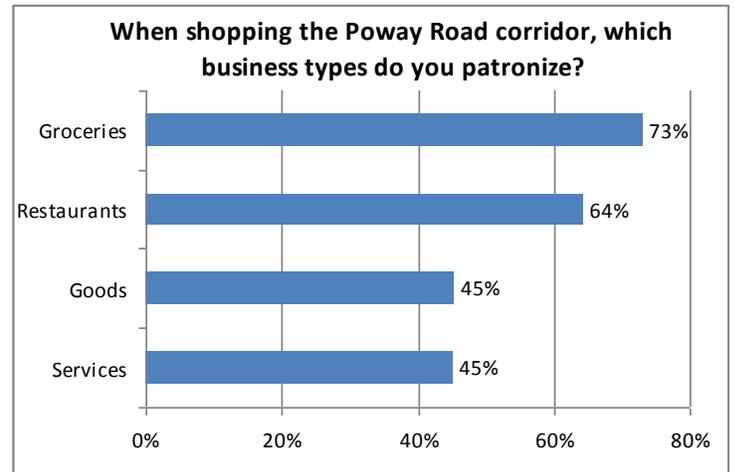
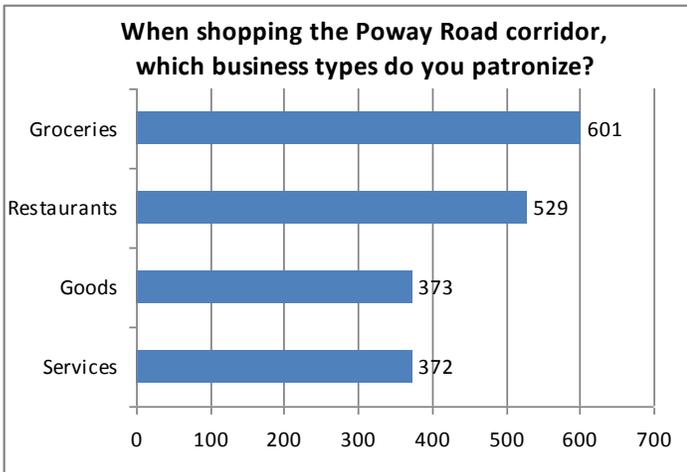
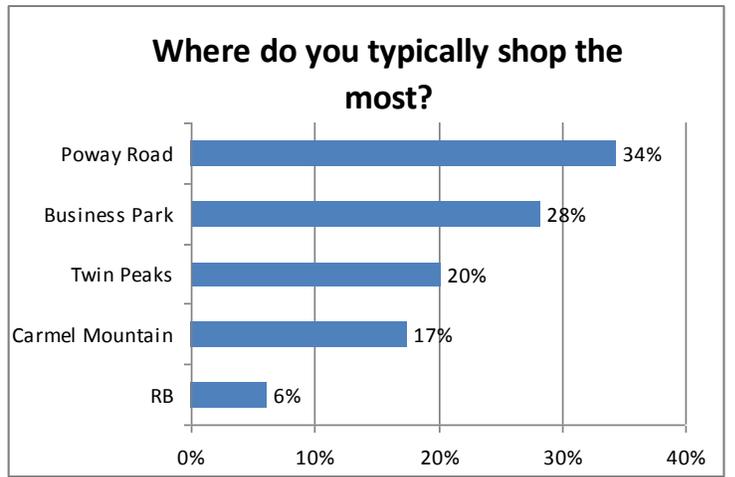
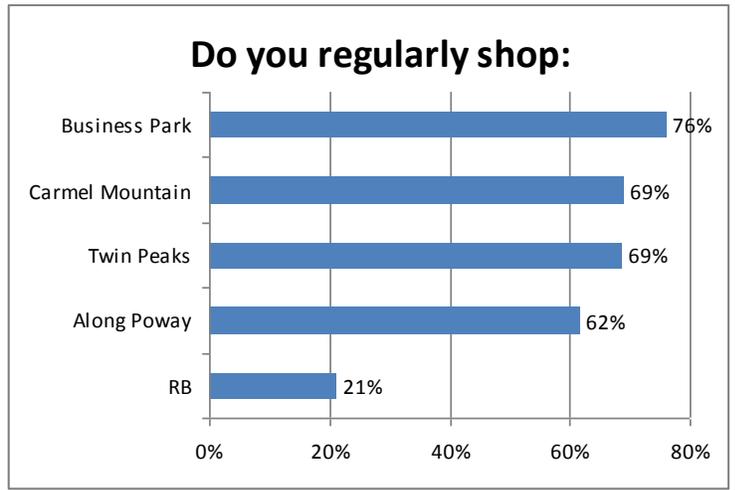
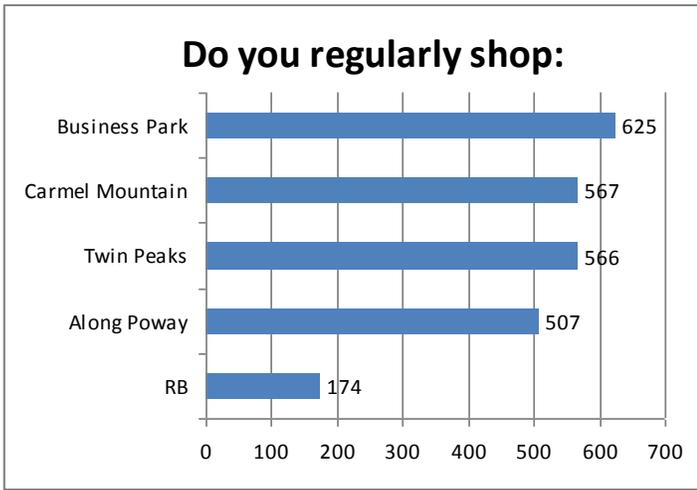
<u>Service</u>	<u>No. of Responses</u>	<u>Service</u>	<u>No. of Responses</u>
Bigger Movie Theatre	9	Gas Station	1
Evening Entertainment / Night Club	9	High End Dealerships	1
24 Hour Fitness	7	Mini Golf	1
Golf Course - driving range	5	Pharmacy (Quality)	1
Dave & Busters	4	Pt Loma Credit Union	1
Bank of America	2	Senior Center	1
Boomers	2	Shoe Repair	1
Concert Venue	2	Shooting Range	1
Farmer's Market - Larger	2	Skating - Ice & Rollerblade	1
Hotels	2	Soccer Field	1
\$1 Movie Theater	1	Stadium	1
Art Center	1	Teen Center	1
Better Library	1	Theater	1
Blue Cross of Cal	1	WAMU	1
BMX track	1	Water park	1
California Coast Credit Union	1	Wells Fargo	1
Costco gas	1	Wine Bar	1
Country Bar	1	Youth Clubs	1
ESPN Zone	1		

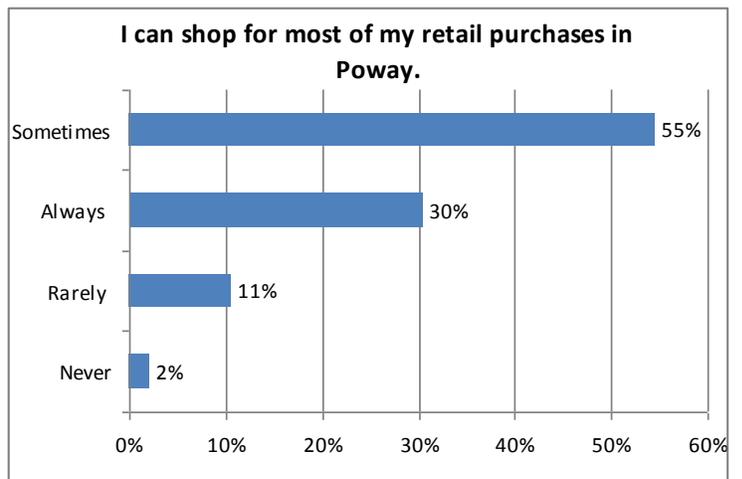
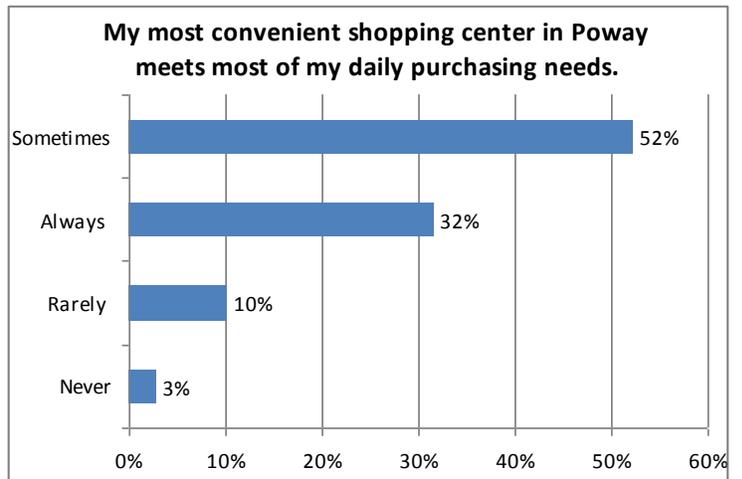
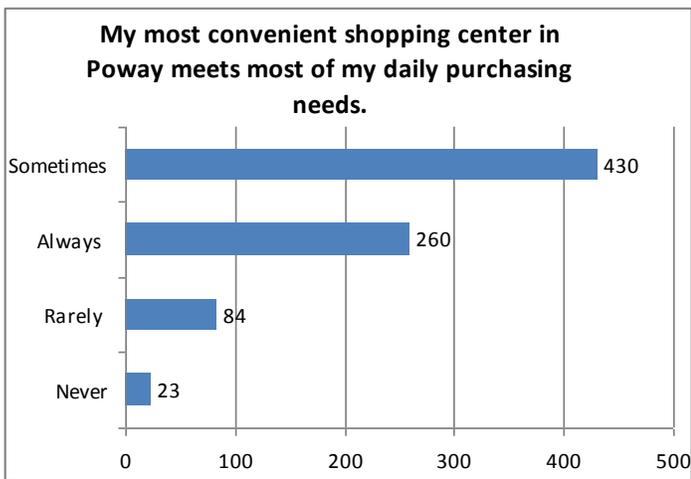
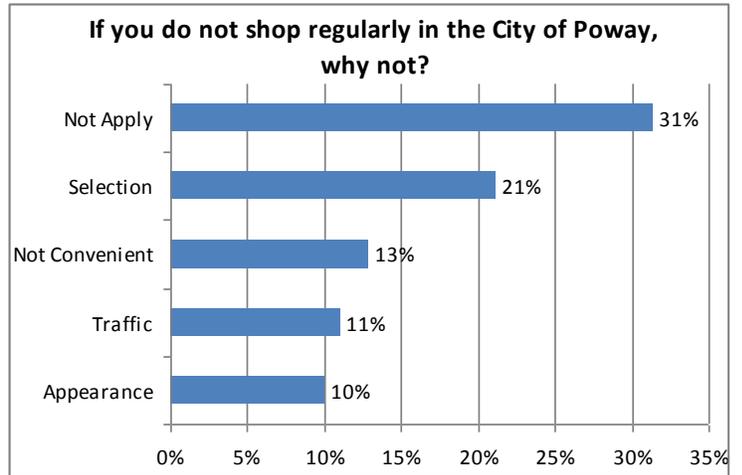
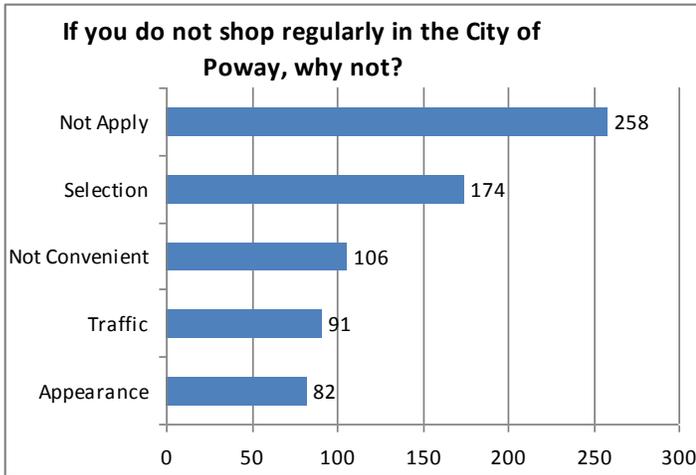
Responses to Open-Ended Questions

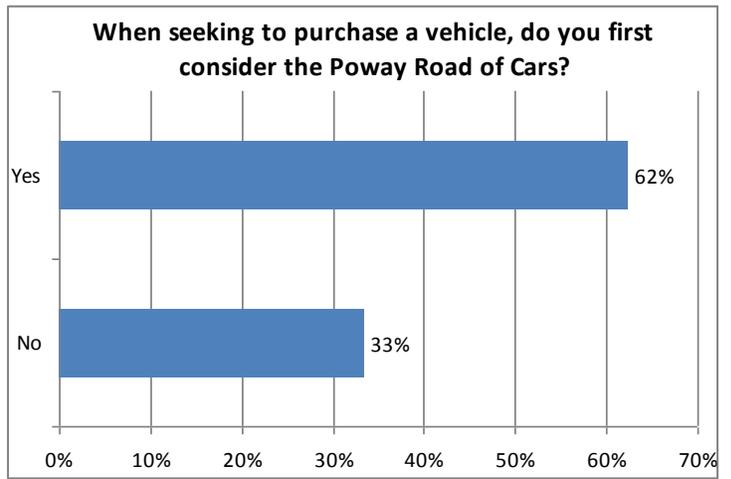
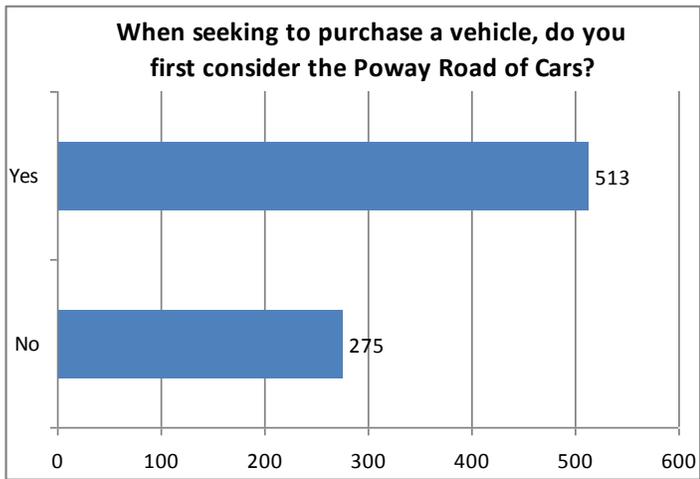
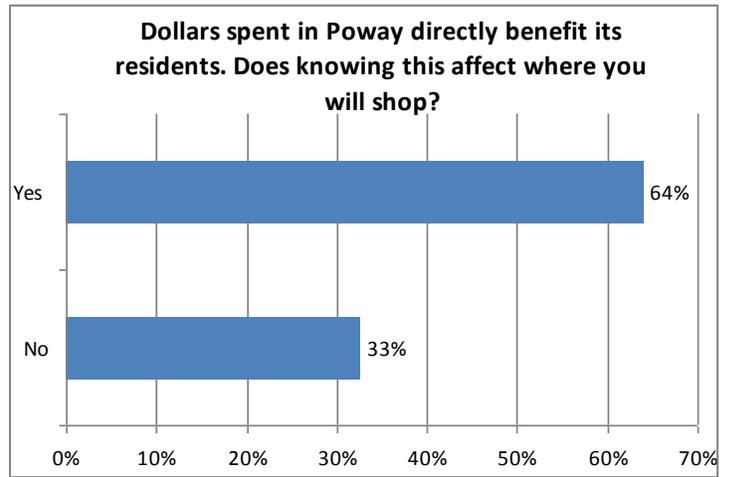
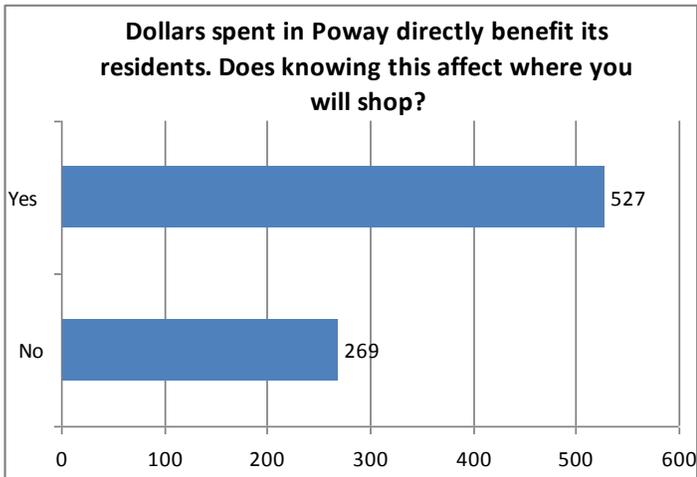
<u>Question #1</u>	<u>No. of Responses</u>
Do you regularly shop: - Other	
Wal-Mart	17
Escondido	16
San Diego	7
North County Mall	7
Scripps Ranch	5
Mira Mesa	4
USMC	4
<u>Question #2</u>	
Where do you typically shop the most? - Other	
Wal-Mart	15
Escondido	6
Scripps Ranch	2
San Diego	2
Mira Mesa	2
North County Fair Mall	1
<u>Question #3</u>	
Which business type do you patronize? - Other	
Movie Theater	15
Fuel- car store	13
Wal-Mart	9
Pharmacy	3
Pet Co	2
Beauty Supply	1
<u>Question #4</u>	
If you do not shop regularly in Poway - Why not? - Other	
Location in Poway	16
Specialty Restaurants/Stores	5
Price	4
Military	2
<u>Question #8</u>	
Poway Road of Cars - Why Not?	
Brand Selection	88
Price	76
Sales Staff	40
Buy Used / Broker / Internet	24
Service	11
Relationship with other dealership	7

Question #9	
What types of stores do you feel Poway lacks? - Other	
Bookstore	29
Wal-Mart Superstore	19
Specialty Stores/ Locally owned	10
Kids Entertainment / Shops	9
Night Club / Sports Bar / Strip Club	9
Bigger Theater	6
Grocery Stores	4
Main center- w/everything	2
Antique Shops	2
Theme Park	2
Less Expensive Stores	2
Furniture	1
Swimming Pool	1
Commuter Airport	1
Upscale Deli	1
Question #11	
What would cause you to do more shopping in Poway?	
Quality Shops & Restaurants	108
Traffic & Convenience	86
More Options/Selections	77
More Inviting/Modernized Shopping Centers	62
Upscale / Independent Businesses	41
Mall	19
Better Prices	15
No Wal-Mart	15
Nothing	7
Better Service	6
Hours - Night Life	4
Listing of Shops in Poway	3

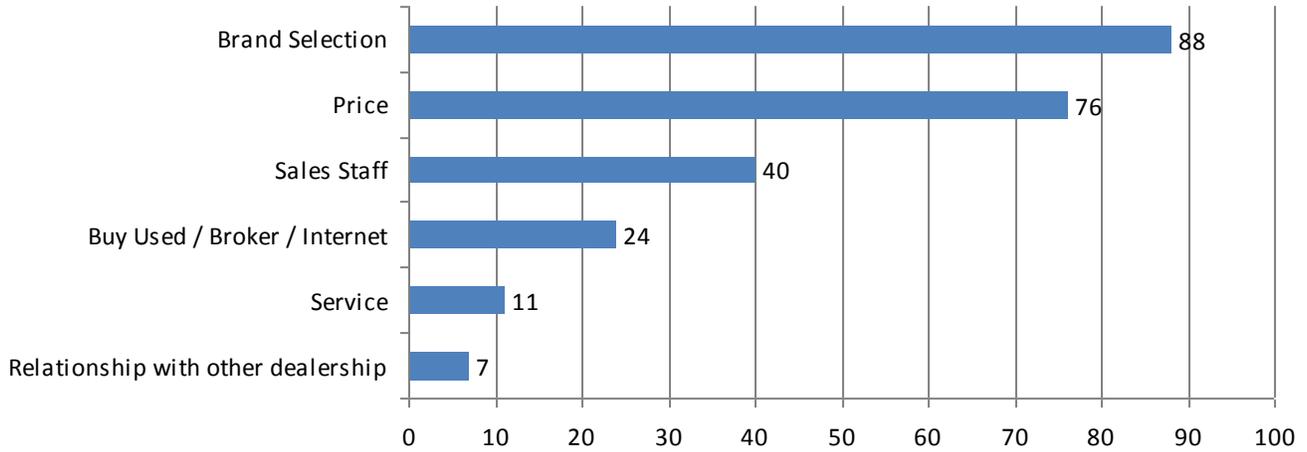
Survey Data Graphs



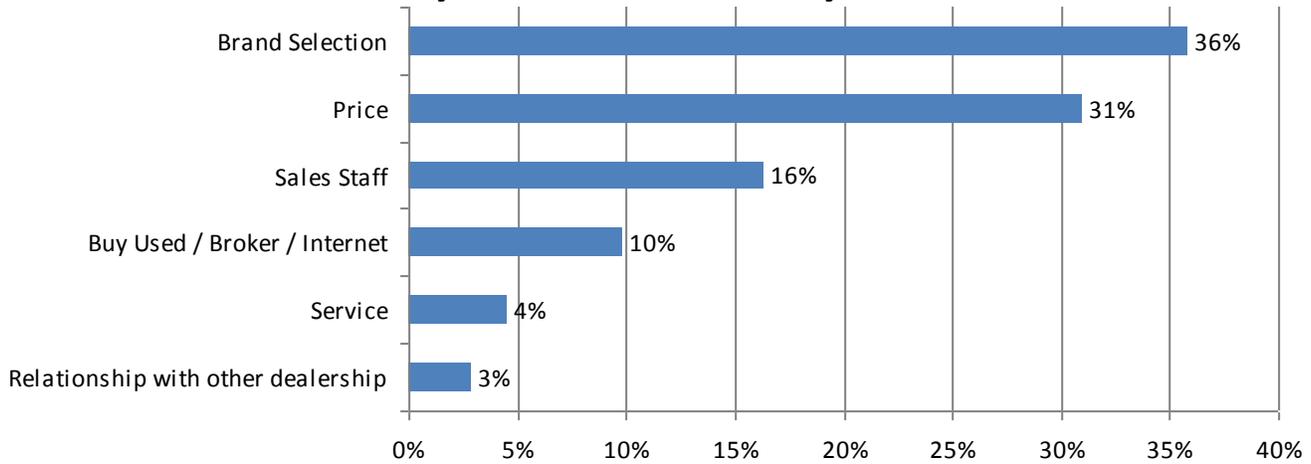


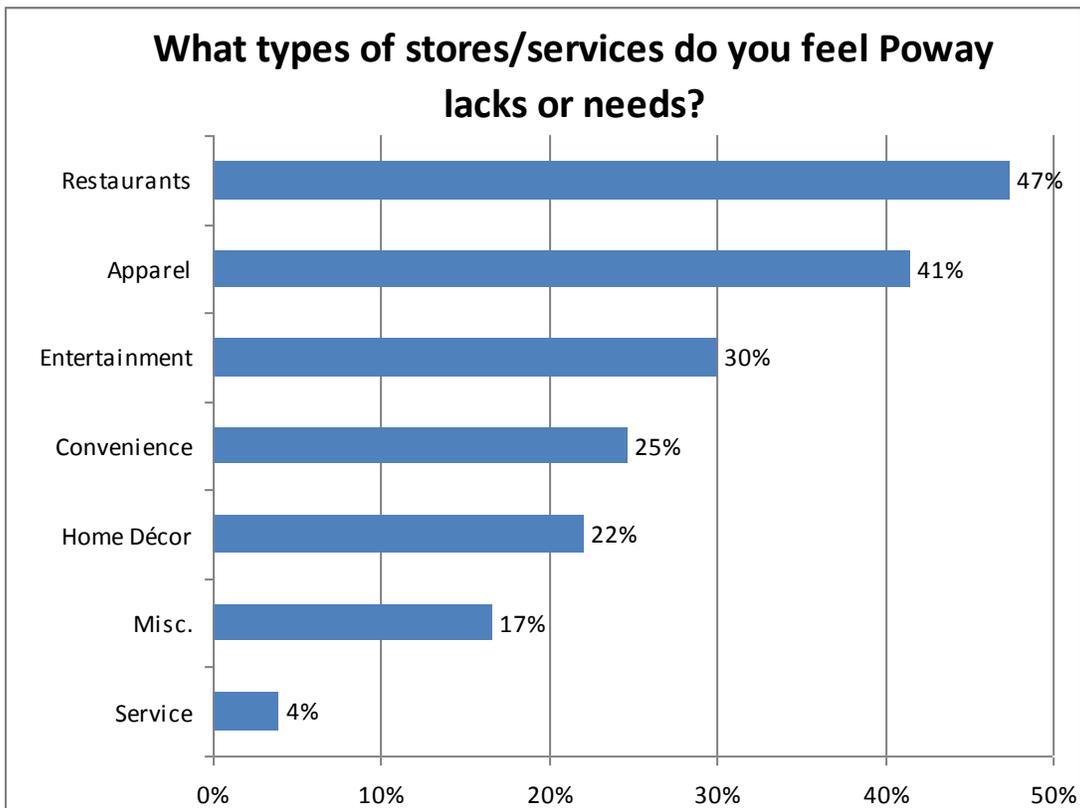
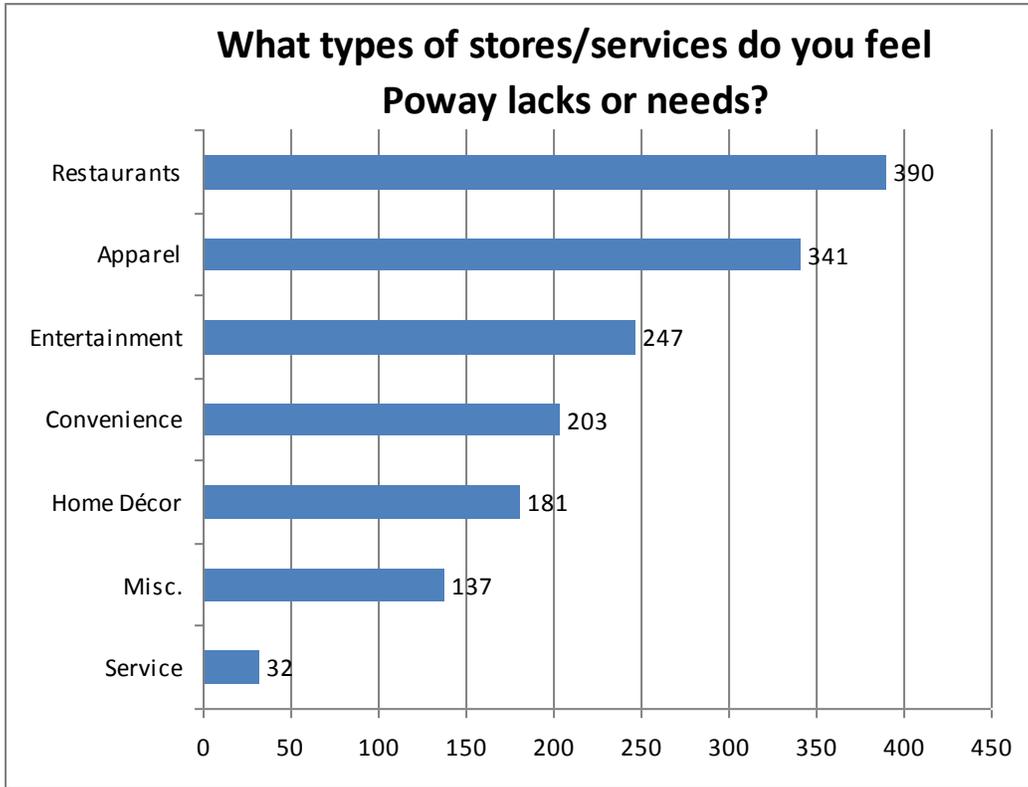


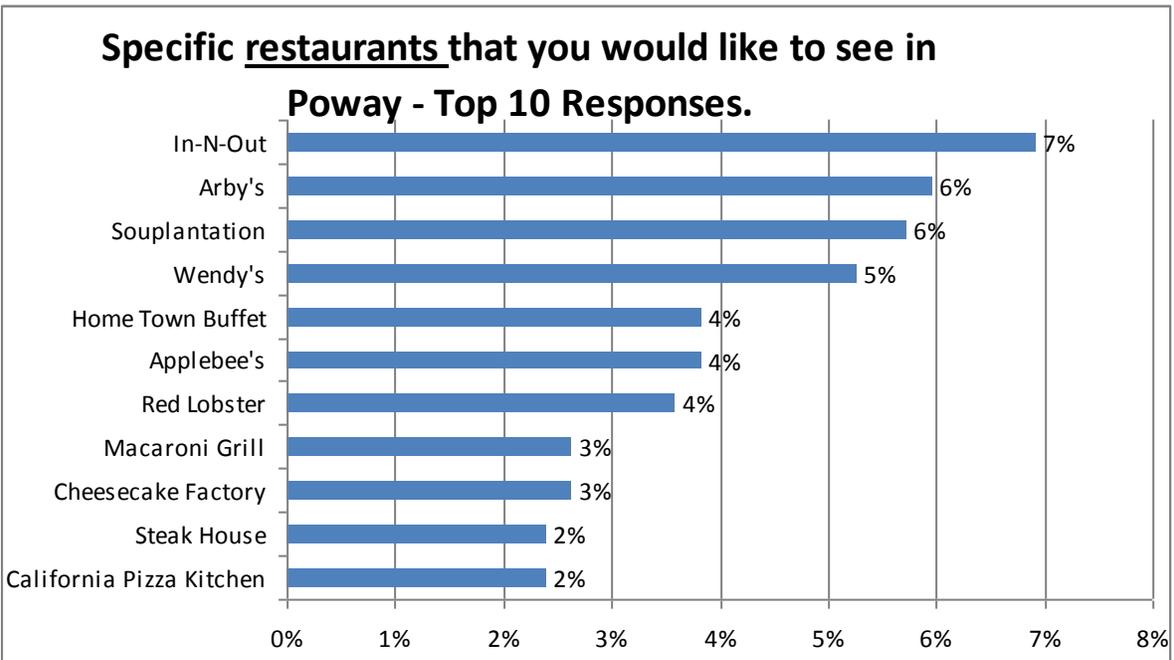
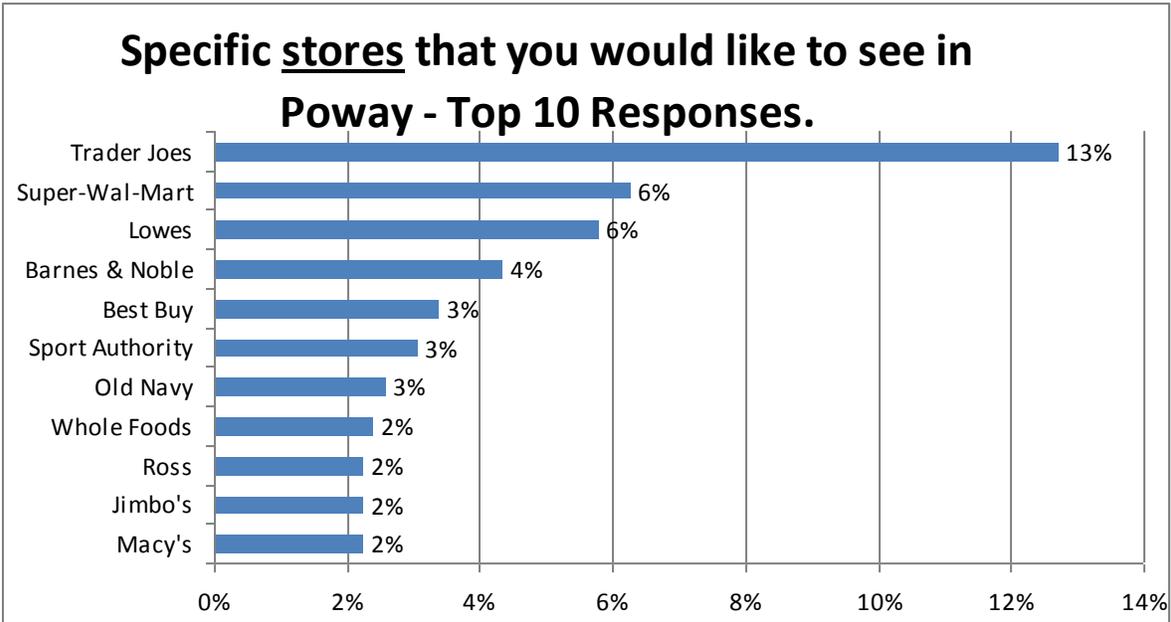
Poway Road of Cars - Why Not?



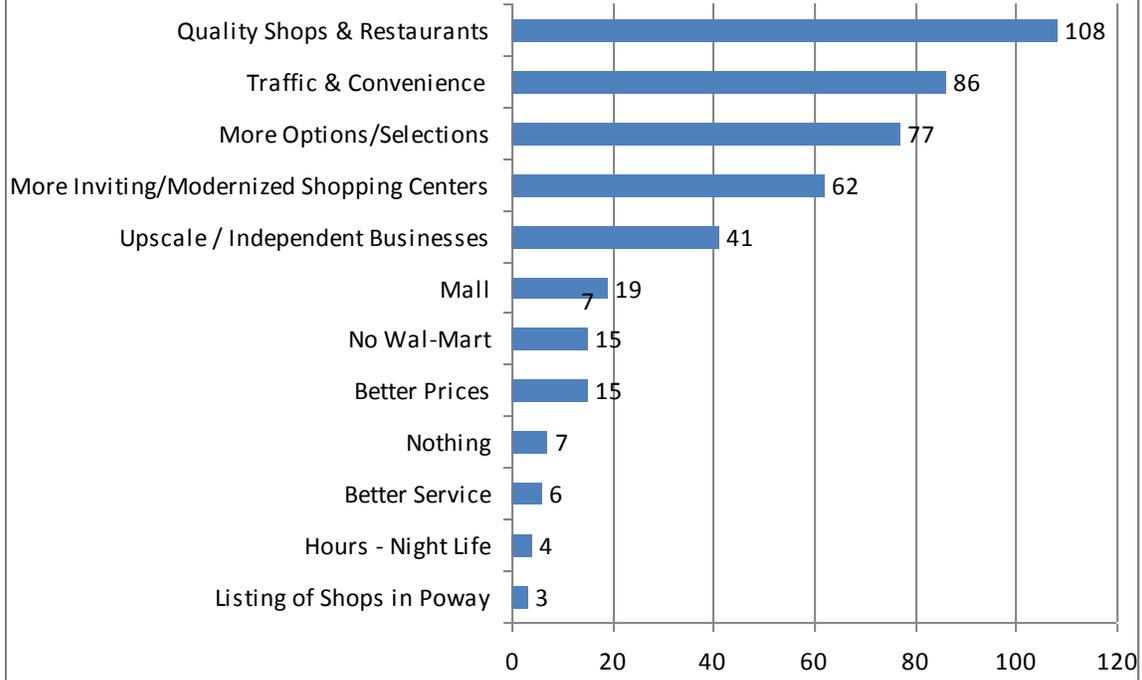
Poway Road of Cars - Why Not?







What would cause you to do more shopping in Poway?



What would cause you to do more shopping in Poway?

