

Manitowoc County Consumer Study


February
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Executive Summary



Prepared by The Leede
Research Group

Methodology

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- The following is the key information related to the design of the study and its implementation in the market:
 - There were 500 completed interviews
 - The questionnaire was custom designed for this study by Leede and the Metrics Ad Hoc Committee of the Economic Development Corporation of Manitowoc County.
 - Data gathering was done through telephone interviews
 - Telephone interviewing was done on Leede's CATI and included supervision
 - Interviews were completed with a random sample of residents in Manitowoc County. This was balanced by zip code population. Ratios of Men and Women and Key Age Groups match the actual population of the County.

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- The following is a summary of the key findings of the study from the perspective of The Leede Research Group:
 - The study was one of the most comprehensive samples Leede has completed in Manitowoc County in its 25 years of business. Besides the traditional balance by zip code population, the study also generated a match in male/female ratios and age groups were monitored. This gives the study a very accurate representation of the County population.
 - A mean expenditure of \$890 was seen in the study for holiday spending. Indications are that this amount was flat to slightly down from the prior year. Manitowoc's Westside was the most popular shopping area.
 - The shopping information provided an important perspective on what happens during the holiday season. Work completed in November for radio station WCUB indicated retail attrition of approximately 30%. This is close to Claritas projections that indicate a 32% attrition of retail sales in Manitowoc County. This study showed attrition of approximately 45%. This indicates that the holiday period increases the outside spending. This appears to be driven in part by 8% of shopping which is done online or through catalog purchases. Clothing, toys, sporting goods and electronics appear to be significant items in this attrition and work may be needed to better inform residents of local options that could meet their needs.

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- The study found the following mean scores on a 7pt scale with 1 being Very Poor, to 7 being Very Good:

• <i>Shopping Opportunities</i>	4.33
• <i>Dining Opportunities</i>	4.85
• <i>Entertainment Opportunities</i>	3.71
• <i>Cultural Opportunities</i>	4.10

The scores clearly show room for improvement and were lowest for those respondents under 35 years of age. This means the area may need to do more to attract and hold this group. Better communication of existing offerings may be important. New entertainment venues may have a strong opportunity for success. Respondents indicate a desire for a Kohl's store, along with more clothing and dining options. Past work completed by Leede indicates that those under 35 tend to be oriented towards national and regional chains in dining. This should be considered when looking at expansion opportunities.

- The retail shopping information sets an important benchmark for future measurement. The information can be used to plan for the future and measure success.

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- The employment portion of the study sought to identify the size of the current workforce in Manitowoc County. The employment attrition rate and future potential of the workforce was also a key concern. This drove the design of the study which was based on previous work completed by organizations in both Australia and the U.S. Where possible, information was compared to government sources to assess credibility and accuracy.
- It was interesting to note that one in five respondents had been unemployed in the past three years. It appears that 10% to 13% of the population had significant events ranging from career changes to reduced hours or cut in pay. This is an indication that Manitowoc County's recent loss of Mirro and loss of related subcontracting work had an impact on the area.
- The study indicates that Manitowoc County has a total workforce of 45,574 when study results are projected into the population and taking into consideration spouses and children over age 16. This does not include the just over 15,000 people who are working outside of Manitowoc County but are County residents. State data indicates an inbound workforce of 3,380 individuals. Between those who are not currently in the workforce and would consider it, and those who are working outside the County but would like to work in Manitowoc County, there are 15,864 potential added workers available.

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- There does not appear to be significant opportunities to move people up in the number of hours they are working weekly. Study results indicate that most are already working at or above the ideal number of hours they would like to work. It should be noted that agricultural workers in the study did have some impact in increasing mean hours worked. There are some opportunities for employers to move workers from part to full time, but this may require those workers to leave other jobs.
- There does appear to be opportunities to upgrade the employment of some in the study. Twenty percent of respondents indicate they are not employed to their full training or potential. They indicate a 3.88 rating on a 7 pt scale for their current level as compared to potential. There are 40% of respondents who believe they are underpaid by an average of 19.5%. These clearly represent opportunities if the right jobs can be found to match skills.
- There were 18% of respondents who are currently involved in training or ongoing education. There are over half of the balance who would consider training to upgrade their position and pay. It appears that a 21% increase in pay would be needed incentive to them to make this investment. This is obviously somewhat challenging as there are often not guarantees for these types of work. It does show that workers are willing to update skills if they see income potential.



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- The study indicates that respondents have experienced slight improvement in their financial situation in the past two years. We see that 30% feel they are in a better position with 25% indicating a worse. They are more optimistic about the future though with 30% indicating they feel they will be in a better position a year from now and only 11% saying a worse one. This is positive and indicates financial optimism which should be good for the local economy.
- There are 72% of respondents who indicate their health coverage is provided through an employer. Of those who do not have employer coverage 22% has such in the past three years. State averages for such coverage had been running at 75% in recent years. Almost two-thirds of respondents indicate that their personal cost of healthcare has increased in the past year. This is consistent with other work completed by Leede and is indicative of shifting of employer costs through both premiums and plan design changes.
- The next step in the study will be to help identify specific groups of employees and related opportunities for upgrades. This will be matched against employer needs to create a resource tool that may help to direct future workforce education and training.
- For more information contact Dean Halverson – dean@leede.com