Metro Richmond Survey

DECEMBER 2006

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Your Market Research, LLC

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METHODOLOGY

The "Metro Richmond Survey" captures the opinions of Richmond area residents in a scientific, projectable poll. This joint venture of Richmond.com and Your Market Research, LLC, has a two-pronged approach. One is a telephone survey, scientifically conducted among 300 area adults. The other is an Internet survey among members of the Metro Richmond Survey Panel, a group that is more representative of the working-age population.

Panel Creation

Metro Richmond Survey Panel members are recruited by three methods currently: from Richmond.com Daily Update recipients who were sent an email requesting their participation in the Panel, by a link on Richmond.com allowing for anyone who lives in the specified areas to join the Panel, and by asking respondents to the telephone portion of the study if they would like to participate in future surveys.

Universe

The universe for the telephone portion of the Metro Richmond Survey is all adult residents (aged 18 or over) residing in the core Richmond Metropolitan area (City of Richmond as well as Chesterfield, Hanover, and Henrico Counties).

The Metro Richmond Survey Panel members are adult residents of the core Richmond Metropolitan area (City of Richmond as well as Chesterfield, Hanover, and Henrico Counties).

Sampling

The telephone portion uses a Random Digit Dialing (RDD) sample. This ensures that all the households in the Richmond area with a land-line telephone have an equal chance of being included during each survey period, even those with unlisted numbers. By using a random sample, the data can be projected to the universe using standard statistical analysis techniques. YMR purchases sample from Survey Sampling, Inc. a recognized leader in the field.

Interviewers speak with a randomly selected adult living within qualifying households. In half of the qualifying households, interviewers asked to speak with a male and in the other half a female. In each case, the interviewers request the youngest adult of the chosen gender to further randomize the respondent within the household.

The Internet Panel portion randomly selects panel members who did not participate in the last Metro Richmond Survey.

Questionnaire

The questionnaire has three key parts: 1) a core set of questions used for tracking changes in opinions over time, 2) questions related to “hot” issues for the area, and 3) questions of interest to select local companies/organizations.

YMR continually works with Richmond.com and local business leaders to ensure the right questions are being asked in the right way in each Metro Richmond Survey.

Local companies and other organizations having questions to ask all survey participants may purchase questions on one or more Metro Richmond Surveys. YMR works with these sponsors to ensure the questions they are asking provide them with the information they need to meet their objectives.

Fielding

The telephone interviews are conducted by Conquest Communication Group, YMR’s telephone calling center partner, which has an 85-station telephone bank. Use of this central telephone bank employing computer-assisted telephone interviewing software (CATI) ensures consistently high-quality interviewing as supervisors are immediately available to resolve any questions brought up during interviewing and scripting and skip patterns are identical for all interviews.

The Metro Richmond Survey Panel interviews are collected using software from LogicDepot. This software adheres to the strictest marketing research standards put forth by the Marketing Research Association. Metro Richmond Survey Panel members receive an email from YMR at the beginning of the survey period. This email contains a unique link, allowing for only one completed survey per recipient. The email also lists the deadline for inclusion; generally one week after the initial invitation email is delivered. Reminder emails are sent to Panel members if the targeted number of completed surveys has not been met (200).

Interviewers and the invitation email introduce this as a research study for Metro Richmond Survey on various issues important to Richmond area residents. Respondents are told that their participation is both voluntary and anonymous. Sponsors are not identified in the questionnaire unless they specifically request it.

Each questionnaire used in the study is pre-tested prior to actual fielding in an effort to eliminate confusing questions or wordings and to ensure that the survey is meeting objectives.

Telephone interviews are generally conducted between 5:30 p.m. and 9:00 p.m. during the week and 10:00 a.m. and 9:00 p.m. on weekends, unless a respondent requests another time for an interview. If necessary, interviewers attempt to reach each telephone number on the sample at least 10 times on various days.

Confidence Level

The total sample of 300 for the telephone sample yields a maximum statistical error of ±5.7% at the 95% level of confidence (i.e. if this study were repeated 100 times, in

95 of those times the percentage giving a particular answer would be within 5.7 percentage points of the percentage who gave that answer in this study).

A randomly chosen sample of 500 (the combined total of interviews between the telephone survey and the Metro Richmond Survey Panel members) yields a maximum statistical error of ±4.4% at the 95% level of confidence.

Data

Extensive data preparation occurs prior to finalizing the study results, including a series of electronic and manual checks. Both the field services staff (telephone interviewing supervisor as well as interviewers) and data processing professionals reviewed the data to ensure the highest possible level of accuracy. The percentages of some questions may exceed 100% due to rounding and/or multiple responses permitted for that particular question. The base will often vary for different questions because a response was not required based on an answer to a previous question.

SUMMARY FINDINGS

The following paragraphs outline key findings from the third wave of the Metro Richmond Survey (MRS). The results presented include the statistically projectable telephone survey and the MRS Panel survey. While the telephone survey results are reflective of the population in the Metro Richmond area, the MRS Panel results are not statistically projectable. Findings where results between the telephone study vary statistically from the online version are highlighted. Interestingly, after close analysis, MRS Panel members respond similarly to those in the telephone survey who have Internet access and are more likely to have more education, a higher annual income, and are younger.

Shopping

Over half of Metro Richmond residents prefer to shop in stand-alone stores and over a third prefer local malls (55% and 37% respectively). Preference for stand-alone stores is higher among whites, long-term residents (10+ years), MRS Panel members, and those with at least some college experience. Half (50%) of Metro Richmond residents shop in stores not located in malls at least once a week and 18% shop in a Richmond area mall during this same time—grocery stores are excluded. This disparity continues when considering how frequently they shop on a monthly basis: 83% shop in stores not in a mall and 61% shop in a Richmond area mall at least once a month. Another third say they shop in a mall only “a few times a year” and 13% shop in stores not located in malls. The likelihood of shopping at least once a week in malls is highest among City of Richmond residents, residents less than 55 years of age, and those with at least some college education. Demographic segments more inclined to shop in malls at least monthly include Henrico and Chesterfield residents, residents less than 35 years of age, and those who have lived in Richmond less than 10 years.

Although the favorite mall or shopping area varies by locality within Metro Richmond, almost a fourth say Short Pump Town Center is their first choice (21% say it is their favorite and another 31% also shop there). Ranking as the second most favorite mall or shopping area is a tie among a number of places including Chesterfield Town Center, Carytown, Regency Square, Stony Point Fashion Center, and Virginia Center Commons (each with 11%-14%). Preference for Short Pump Town Center increases with income and education and decreases with age. Non-blacks and newer residents are more inclined to choose Short Pump Town Center. Additionally, Stony Point Fashion Center and Regency Square have a similar percentage relative to Short Pump Town Center as places they shop, but do not include it as a favorite (29%-32% each).

A third of area residents plan to spend “less” during this holiday shopping season (33%), while 11% plan to spend “more” and 55% plan to spend “about the same” as in previous years. Spending more this holiday season is higher among residents with higher household income ($100,000+), males, and those less than 55 years of age. MRS Panel members are more likely to say they will spend less this holiday season.

Two-thirds have a favorable opinion of the holiday shopping season (66%, including 18% who have a "very favorable" opinion). Conversely, only 8% have a "very unfavorable" opinion of the holiday shopping season and 5% do not shop. Favorability is higher among residents with a household income of $50,000 or more and younger residents (less than 35 years of age).

Non-Profits

Nine out of ten Metro Richmond residents say they contribute money or time to local charities and non-profit organizations, (89%) including 5% who say the contribute their time only. However, when asked how often they volunteer their time, 46% of all residents do not volunteer at all. On the other hand, 13% volunteer their time weekly, 11% volunteer monthly, 26% volunteer a few times a year, and 4% only volunteer during the holiday season. Monetary contributions is higher among residents with a household income of $50,000 or more, those aged 55 or over, whites, post-graduates, and homeowners. MRS Panel members are less inclined to donate money, but more likely to say they only contribute their time. Volunteering time to local charities/non-profits is higher among City & Hanover residents, those with a household income of $50,000 or more, younger and middle-age residents, long-term residents (10+ years), MRS Panel members, and college graduates.

Although nearly half of residents say their contributions to local charities/non-profits has "stayed the same" this year over previous years, nearly as many say their contributions has "increased" (46% and 42% respectively). Only 12% say their contributions have "decreased" (higher among residents with a household income below $50,000 and Hanover residents). The likelihood of increasing contributions this year relative to previous years is higher among City residents, those less than 35 years of age, whites, and increases as income level increases.

When searching for information about local charities/non-profits, Metro Richmonders first ask friends/family/colleagues or search the Internet (36%-38% each among those who have made contributions). Other sources of information include direct mail (17%), newspaper (13%), television (12%), and the radio (7%). Another 20% of area residents name a different source, but not many provide a similar response. Using the Internet to search for this information is higher among contributors who live in City limits, have a household income of $50,000 or more, females, younger residents (under 35), newer residents, renters, and MRS Panel members.

Almost a third of local contributors say "the cause" is the most important factor when deciding whether to donate to a particular charity (31%), and another 16% say that they know something about the organization or if it has name recognition. Other factors considered are measurable results (10%), reputation (9%), helped someone they know (7%), low overhead (6%), local presence (5%), or another reason (11%). Each factor varies somewhat by demographic characteristics.

<u>A third of contributors believe non-profits could spend up to 25% of their overall budget on fundraising and administration costs</u> (32%, including 11% who say they could spend up to 35% and 4% say up to 50%). Another 22% say it would be acceptable for non-profits to spend 15%-25% on these overhead costs and 13% believe they should spend less than 10%. Spending up to 25% (at least) is higher among Chesterfield residents, those less than 35 years of age, blacks and other minorities, those who completed the survey over the phone (i.e. not MRS Panel members), residents without a post-graduate degree, and renters.

<u>Unprompted, almost a fourth of Metro Richmond residents name the Salvation Army or Angel Tree, ranking it highest as a non-profit organization that comes to mind</u> (23%). When respondents are asked unaided which local charities/non-profit organizations come to mind, 23% think to name the Salvation Army or Angel Tree (i.e. they were not given a list from which to choose). Keep in mind the time of year this question was asked—holiday shopping season where the Salvation Army has considerable presence in shopping areas. Other popular non-profits include American Red Cross (17%), United Way (16%), Church/Synagogue (11%), Central Virginia Food Bank (10%), Goodwill (9%), and Richmond SPCA (8%). No more than 6% name any one particular charity or non-profit. Of course, these answers vary by demographic segments.

<u>When asked to which local charities or non-profits they have contributed money, responses are very similar to those given when naming all they could think of at the time.</u> This question was asked unaided/unprompted for the randomly selected respondents, while MRS Panel members were given a list from which to choose. Of course, the percentages among MRS Panel members are considerable higher. Non-profits that MRS Panel members contributed to and chose from a list include American Red Cross (40%), Church/Synagogue (39%), United Way (38%), Salvation Army (37%), Central Virginia Food Bank (34%), Richmond SPCA (28%), Make-a-Wish Foundation (16%), March of Dimes (15%), Stop Child Abuse Now (15%), Boys and Girls Club (11%), and Christian Children's Fund (11%). No more than 10% of MRS Panel members chose any of the remaining listed non-profits (or captured in an "other" category). These answers again vary by demographic segments.