

SIoux CITY SURVEY SUMMARY

In April 2016, an online survey was developed to collect broad stakeholder input on priorities and improvements to Downtown Sioux City over the next 5 to 10 years. There were a total of **616 responses**. The following analysis presents the survey's key findings and results.

KEY FINDINGS

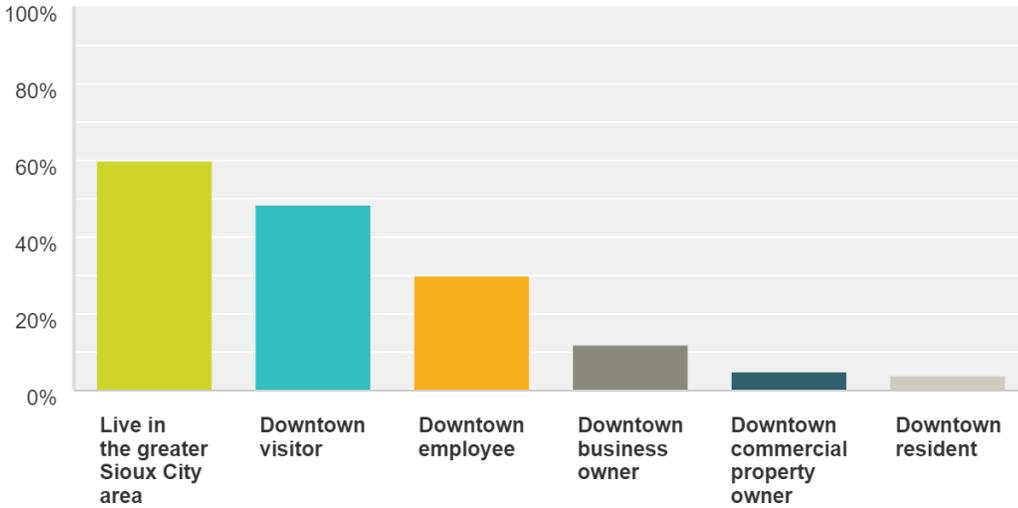
- The top three factors that respondent's considered most important in *improving Downtown Sioux City over the past five years* were: **New Restaurants & Retail, New Businesses & Jobs, and Festivals + Events/Farmer's Markets.**
- The five most common words used to describe respondents' ten-year *vision* for Downtown Sioux City were: **Vibrant, Fun, Clean, Entertainment, and Destination.**
- The top five actions respondents chose as *very important steps for achieving their vision* for Downtown Sioux City were: **Activate the riverfront** (make it more appealing, active and user-friendly) (69%), **Support/Incentivize business start-ups and entrepreneurs** (58%), **Improve the parking experience for customers and visitors** (58%), **Develop more outdoor green space/pocket parks/places to gather** (53%), and **Promote a fresh image/brand for Downtown** (50%).
- When asked to choose the *single most important action* to achieve the vision, the top five choices were:
 1. **Activate the riverfront, make it more appealing, active and user-friendly – 19%**
 2. **Encourage more nightlife, restaurants and clubs, create entertainment niche – 13%**
 3. **Support/incentivize business start-ups and entrepreneurs – 13%**
 4. **Attract neighborhood serving retail and amenities (such as a grocery store, dog park)– 10%**
 5. **Promote a fresh image/brand for Downtown Sioux City– 9%**

RESPONDENT CHARACTERISTICS

Survey respondents were asked to select up to two responses that characterized their primary interest(s) in Downtown. The majority of survey respondents categorized themselves as living within the greater Sioux City area and/or as a Downtown visitor. About 30% of respondents work Downtown.

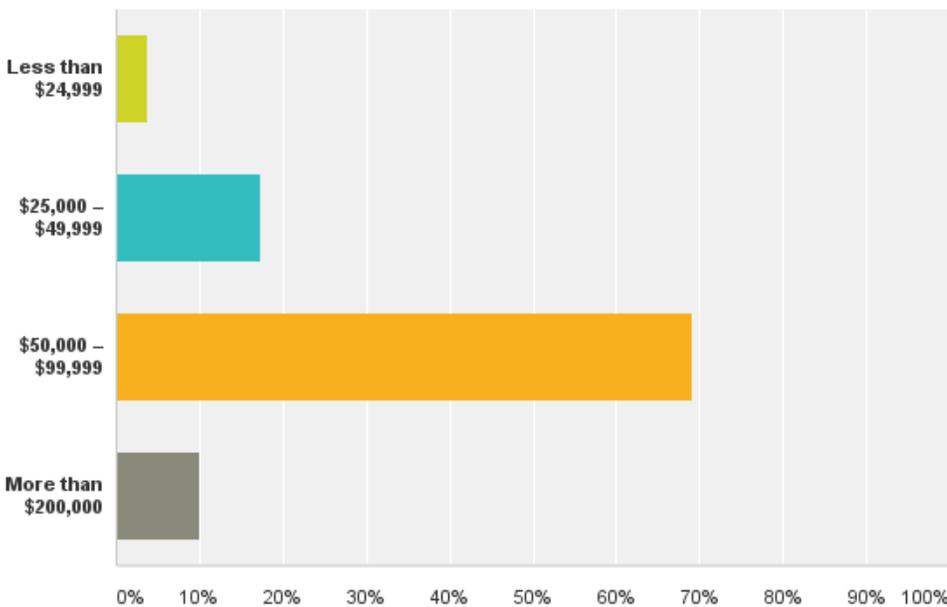
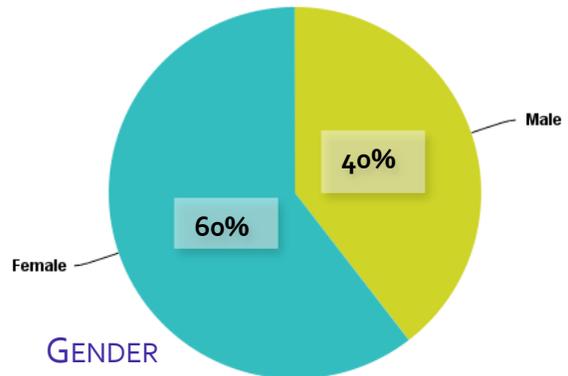
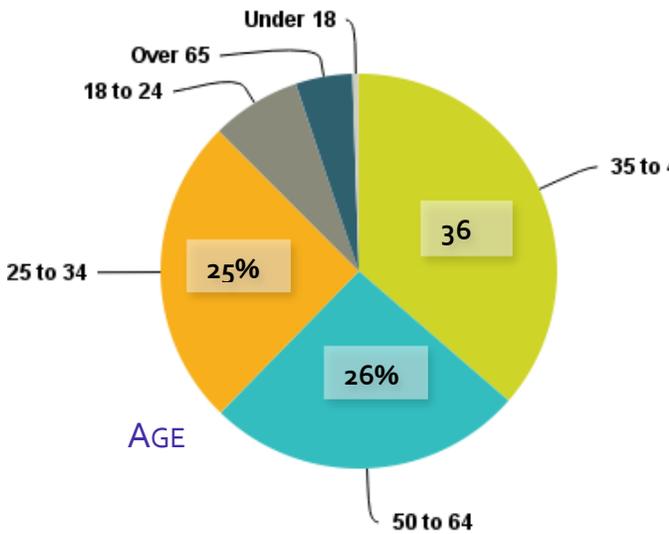
Other characteristics of respondents include:

- Female (60%); Male (40%)
- White (92%); Other (3%); African American (0.7%); Asian or Pacific Islander (0.7%); Hispanic (3%)
- Less than \$50k (21%); \$50-\$100K (37%); \$100-\$200K (32%); More than \$200K (10%)
- Most common home zip codes: 51104 (32%), 51106 (27%), 57049 (8%)
- 54 respondents live across the river in South Dakota; 19 live across the river in Nebraska.

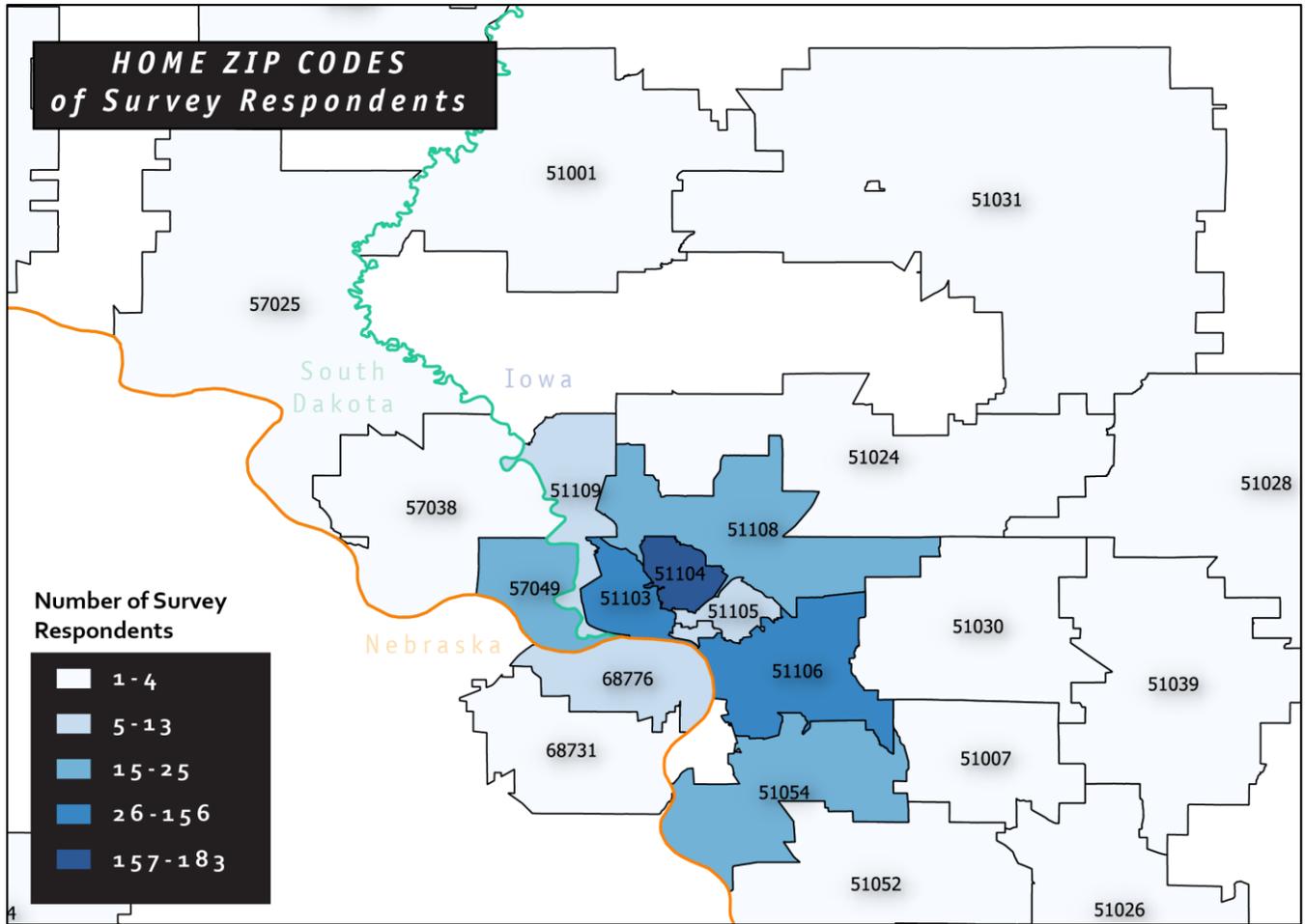


INTEREST IN DOWNTOWN

(option to choose up to two interests)



HOUSEHOLD INCOME



SURVEY RESPONSES

Q1: OVER THE PAST FIVE YEARS, WHICH FACTORS HAVE BEEN IMPORTANT IN IMPROVING DOWNTOWN SIOUX CITY?

Respondents were asked to rate the importance of the following factors, from 'Very Important' to 'Not Important', based on each factor's impact on improving Downtown Sioux City over the past five years. The addition of new restaurants, retail, businesses, and jobs, ranked the highest.

Answer Options	Very Important	Important	Somewhat Important	Not Important
New restaurants and retail	65.6	28.1	4.5	1.8
New businesses and jobs	64.0	29.2	4.8	2.0
Festivals and events/farmer's markets	59.7	29.4	9.9	1.0
Historic building rehabilitation	53.2	31.2	13.3	2.3
LaunchPAD Children's Museum	45.8	30.1	19.2	4.3
Improved streetscapes	44.7	30.7	13.4	3.2
Arts and culture	43.1	38.5	15.8	2.7
Hard Rock Hotel & Casino	40.0	30.4	17.4	12.3
Downtown housing	26.2	31.2	29.5	13.1

Q2: LOOKING TO THE FUTURE, PLEASE OFFER THREE WORDS THAT BEST CAPTURE YOUR VISION FOR THE FUTURE OF DOWNTOWN SIOUX CITY BY THE YEAR 2025.

The Word Cloud below shows that survey respondents would like to see Downtown Sioux City become a place that is **vibrant, fun, clean, entertaining, and a destination**

Q3: TO ACHIEVE YOUR VISION FOR DOWNTOWN SIOUX CITY, WHICH OF THE FOLLOWING ACTIONS WILL BE IMPORTANT?

Respondents were asked to rate the importance of the following factors, from 'Very Important' to 'Not Important', based on each factor's impact on achieving respondents' future vision for Downtown Sioux City. The top scorers were **Activating the riverfront, Supporting/Incentivizing small business start-ups and entrepreneurs, and Improving the Downtown parking experience.**

Answer Options	Very Important	Important	Somewhat Important	Not Important
Activate the riverfront, make it more appealing, active, and user-friendly	69.3	21.9	6.8	2.0
Support/incentivize small business start-ups and entrepreneurs	57.8	30.5	10.4	1.3
Improve the parking experience for customers and visitors	57.7	27.1	12.7	2.5
Develop more outdoor green space/pocket parks/places to gather	52.7	28.4	14.5	4.5
Encourage more nightlife, restaurants and clubs, create an entertainment niche	50.3	30.6	14.6	4.5
Promote a fresh image/brand for Downtown Sioux City	50.3	28.6	15.6	5.5
Attract neighborhood serving retail and amenities (such as grocery store, dog park)	49.2	31.1	14.4	5.3
Make Downtown Sioux City more walkable, bikeable	47.8	34.3	15.4	2.5
Improve connections between neighborhoods, downtown and the riverfront	43.2	37.9	15.4	3.5
Encourage more arts and culture, public art	42.5	38.6	16.1	2.8
Consider narrowing one-way streets and/or converting some to two-way	24.8	27.0	29.0	19.2
Provide more housing and housing options/price points	24.4	33.7	31.2	10.6
Improve and expand the skywalk system	23.3	31.1	31.1	14.6
Provide better public transit	18.1	32.3	36.8	12.9

Q4: TO ACHIEVE YOUR VISION FOR DOWNTOWN SIOUX CITY, WHICH OF THE FOLLOWING ACTIONS FROM QUESTION 3 WILL BE THE MOST IMPORTANT?

When asked to select just *one* action for improving Downtown Sioux City, one-fifth of respondents said activate the riverfront, indicating a strong desire for this action. Encouraging more nightlife, restaurants/clubs, and entertainment, was the second most desired action. Nine of the top ten actions were the same in both question 3 and 4. Providing more housing and housing options/price points, appears on the top ten list below but was not one of the most important actions in question 3.

1. **Activate the riverfront, make it more appealing, active and user-friendly – 19 %**
2. **Encourage more nightlife, restaurants and clubs, create entertainment niche – 14%**
3. **Support/incentivize business start-ups and entrepreneurs – 13%**
4. Attract neighborhood serving retail and amenities (such as a grocery store, dog park) – 10%
5. Promote a fresh image/brand for Downtown Sioux City – 9%
6. Improve the parking experience for customers and visitors – 8%
7. Develop more outdoor green space/pocket parks/places to gather – 5%
8. Make Downtown Sioux City more walkable, bikeable – 5%
9. Provide more housing options/price points – 5%
10. Improve connections between neighborhoods, downtown and the riverfront – 5%
11. Encourage more arts and culture, public art – 3%
12. Consider narrowing one-way streets and/or converting some to two-way – 2%
13. Improve and expand the skywalk system – 1%
14. Provide better public transit – 0.7%

Q5: IF YOU COULD SUGGEST ONE SPECIFIC IMPROVEMENT TO ENHANCE DOWNTOWN SIOUX CITY, WHAT WOULD IT BE? (OPEN ENDED)

Common themes from the Word Cloud (below) include:

- Enhance restaurant and entertainment options, more family-friendly establishments
- Rethink downtown parking: reduce fees, add parking, and/or remove parking meters completely
- Add more greenspace, gathering places, outdoor-seating, and plazas
- Rehabilitate (or tear down) older buildings that are eyesores
- Expand business hours for downtown retail establishments (e.g. beyond 5 pm and weekends)
- Create reasons for visitors to pull off of I-29, explore, and patronize hotels and businesses
- Many respondents expressed a desire for a marketplace similar to Old Market in Omaha



CROSS-TABULATIONS

Survey results were cross-tabulated by the following:

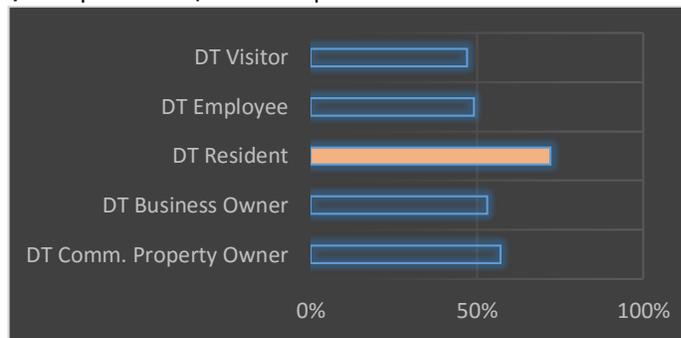
- Interest in Downtown Sioux City
- Annual household income
- Age

Cross-Tabulation by Interest in Downtown

The following data highlights respondents' differing preferences and values for Downtown Sioux City based on each respondent's primary interest(s) in Downtown. Interests listed in the survey included: Downtown commercial property owner, Downtown business owner, Downtown residents, Downtown employee, Downtown visitor, and those that live in the greater Sioux City Area. (Respondents were able to choose up to two interests).

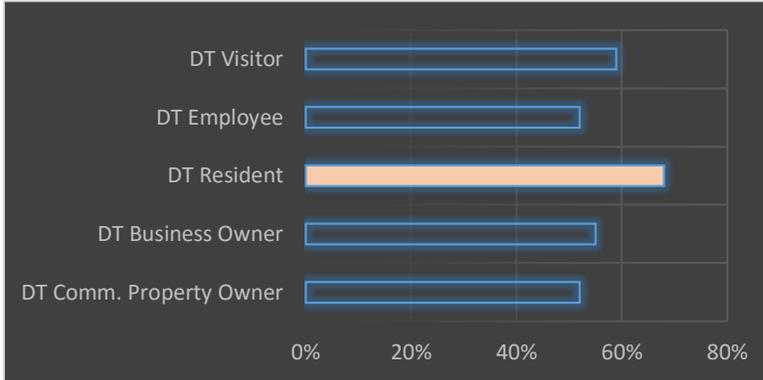
"Interest in Downtown"	Commercial Property Owner	Downtown Business Owner	Downtown Resident	Downtown Employee	Downtown Visitor
# Survey Respondents	28	72	25	182	293

- **Walkability + Bikeability** | Making Downtown more walkable and bikeable was seen as 'very important' by 72% of Downtown residents, compared to 48% of respondents overall.



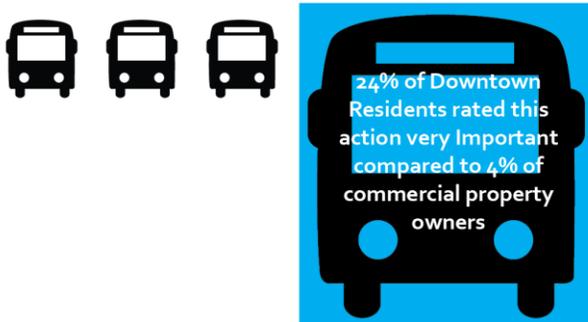
- **Riverfront** | Improving the riverfront (e.g. making it more appealing, active, and user-friendly) has wide appeal, and was chosen as 'very important' roughly 70% of the time, across the board, regardless of category of interest in downtown. This is also true across age and income.
- **Housing** | Providing more housing and housing options/price points was considered "very important" by downtown residents (52%). About a third of commercial property owners (39%) and Downtown business owners (32%) gave it the 'very important' rating. Downtown visitors were least likely to prioritize housing.

- **Fresh Image** | Promoting a fresh image/brand for Downtown was most important for commercial property owners and downtown visitors. 32% of Downtown residents rated this action as 'very important' compared to the 50% overall average.
- **Neighborhood-serving Retail and Amenities** | 68% of Downtown residents ranked "Attract neighborhood serving retail and amenities (such as grocery store, dog park)" as very important, compared to 49% of respondents overall.

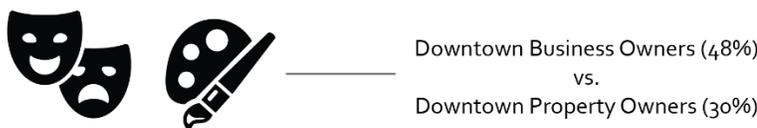


Respondents that ranked "Neighborhood serving retail and amenities" as very important

- **Transit** | Downtown residents (24%) were most likely to rate "improving public transit" as very important, while only 4% of commercial property owners did. 18% was the average.



- **Supporting Small Businesses Start-Ups** | Supporting and incentivizing small business start-ups and entrepreneurs was 'very important' to 75% of business owners, 59% of commercial property owners, 52% of Downtown residents, 53% of Downtown employees, and only 16% of visitors.
- **Arts + Culture** | Downtown Visitors (46%) and Downtown business owners (48%) prioritized arts, culture, and public art. Downtown employees (37%) and Downtown commercial property owners (30%) were less likely to rank the option as 'very important.'



Cross-Tabulation by Income

The following section highlights prevalence of answers compared to household income of respondents. The choices for income range are shown in the chart below.

Household Income	< \$25K	\$25-\$49K	\$55-\$99K	\$100-199k	\$200k +
# Survey Respondents	20	93	198	174	54

- Walkability + Bikeability** | Generally speaking, respondents of from lower and moderate income households were more likely to highly rate “making Downtown more walkable, bikeable.” (60% of those between \$25 and \$49K, compared to 43% of those over \$200K or between \$100-\$199).



- Housing** | Those with household incomes over \$200K were least likely to rate “Provide more housing options/price points” as ‘very important’ (15%), compared to 30% of those under \$25K, and 24% overall.

- Nightlife, Restaurants, and Entertainment** | 57% and 59% of those with household incomes under \$25K and \$25-\$49K, respectively, rate this improvement as ‘very important.’ The next income bracket, \$55-\$99K, was the least likely to give it the same rating (43% said encouraging more nightlife, restaurants, and clubs as “very important”). Those with household incomes over \$200K were the second least likely (46%).



- Transit** | There is an inverse relationship between income and prioritization to improve transit in Downtown Sioux City. The largest proportion of respondents rating “provide better transit” as ‘very important’ were households between \$25 and \$49K (32%). Only 8% of those in \$200K + households consider it “very important,” and 12% of the \$100-199K bracket and 20% of the \$55-99K bracket.



Greenspace/pocket parks/gathering places | Those with higher household incomes were slightly less likely to rank this option as “very important.” (The breakdown is as follows: <\$25K: 60%, \$25-\$49K: 58%, \$55-\$99K: 53%, \$100-\$199K: 53%, \$200K+: 49%).

Cross-Tabulation by Age

The following data highlights differing preferences and values for Downtown Sioux City based respondent age. Note: the survey had an option for *under 18* and for *18-24*, but they were combined into one category for this analysis due to the relatively small number of under 18-year-old respondents.

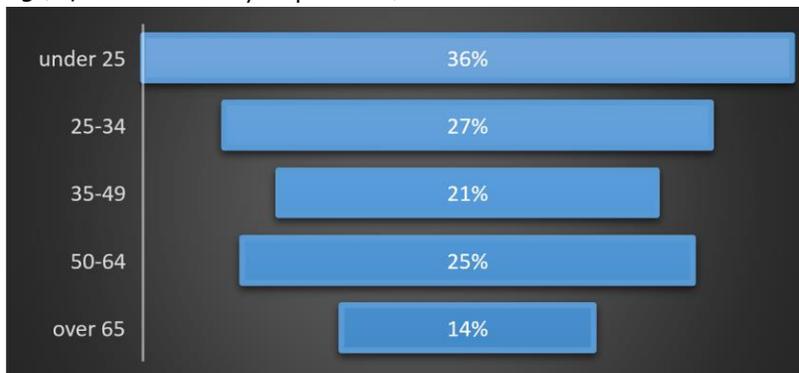
Age Range	Under 25	25-34	35-49	50-64	Over 65
# Survey Respondents	47	151	219	155	28

- Walkability + Bikeability** | Most of those ranking "bikeability and walkability" as 'very important' fall under the age of 50. [e.g. 60% of 25-34 year-olds compared to 48% overall].



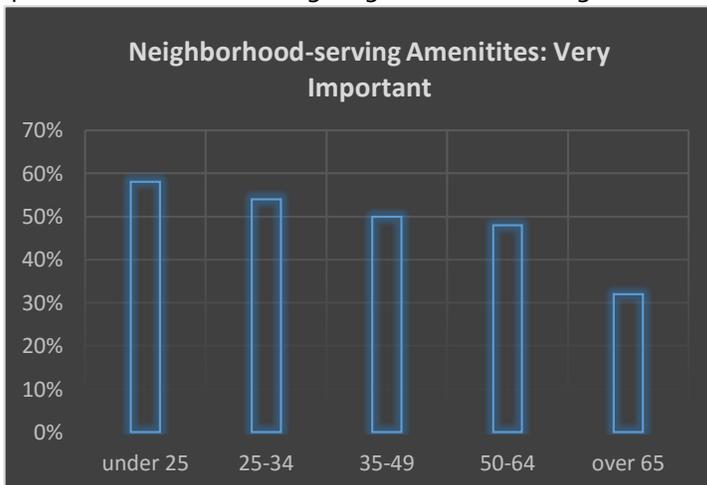
The younger age groups felt more strongly about prioritizing bike and pedestrian improvements

- Housing** | Increasing affordable and market-rate housing options and price points was rated highest by those under 25 (36%) compared to the average respondent (24%). It was least important to those over 65 (14% rated it 'very important').



Respondents that ranked "Housing options and affordability" as very important, by age.

- Neighborhood-serving Retail and Amenities** | An inverse relationship exists between age and prioritization of attracting neighborhood serving retail and amenities.



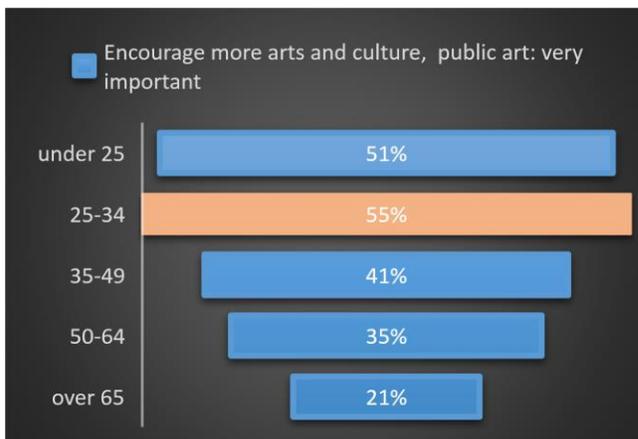
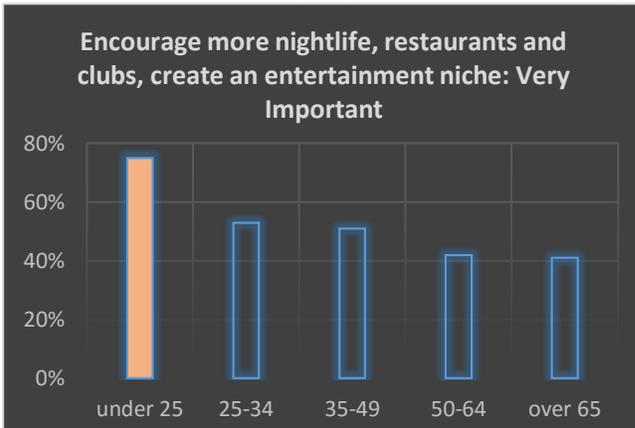
Respondents that ranked "Neighborhood serving retail and amenities" as very important, by age.

- Parking** | 82% of those over 65, and 68% of the 50-64 cohort, felt strongly about improving the parking experience, compared to 49% of respondents under 25. 'Improving parking' was given as an answer to question 5 (see word cloud) mostly by those over 35.

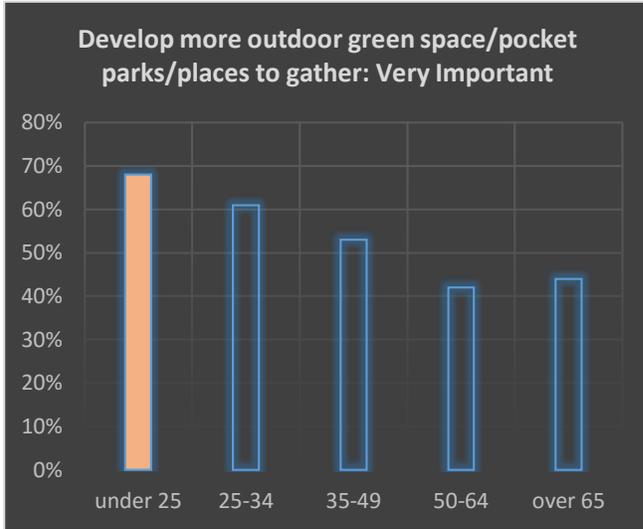


The older populations feel more strongly about improving Downtown parking

- Nightlife, Restaurants, and Entertainment** | There is a strong correlation between age and desire for more nightlife, restaurants and clubs, and creating an entertainment niche. 75% of individuals under 25 rated this action as 'very important,' compared to 50% of respondents overall.



- Arts + Culture** | There is also a correlation between age and interest in promoting the arts. 51% and 55% of the under-25 and 25-34 groups, respectively, thought encouraging more arts and culture, and public art, was 'very important.' 40% of 50-64 year-olds and 21% of 65+ respondents gave it the 'very important' rating.



• **Greenspace/pocket parks/gathering places |** Making Sioux City more “green” or adding more “greenspace” was overwhelmingly a response from a respondent under the age of 50 when compared to those over 50, in the open-ended Question 5. Based on the results of Question 3, 68% of individuals under 25 rated “Develop more outdoor green space/pocket parks/places to gather” as ‘very important’, compared to 42% of those between the ages of 50 and 64, and 53% overall.

