



Town of Flower Mound
Citizen Retail & Restaurant Recruitment Survey
Executive Summary
May 2011

As a result of the Town's desire to attract new retailers and restaurants, economic development staff have embarked on an initiative to determine resident shopping and dining preferences and market the results to desired establishments.

Purpose

The previous Citizen Retail & Restaurant Recruitment Survey was conducted by the Town's economic development (ED) staff in September 2007. This recent survey is expected to capture updated information that will be used to recruit new restaurants and retailers most likely to succeed in Flower Mound. ED will use the results of this survey as a recruitment tool to target the top ranked restaurants and retailers. Additionally, the results will be communicated to retail brokers, developers and land owners in order that they may also utilize this information in their recruitment efforts.

Methodology

ED provided a Retail & Restaurant Recruitment Survey to all Flower Mound households (20,885) within the February/March 2011 utility bill. The survey allowed up to two respondents per household to identify up to ten retailers and restaurants they would most like to see in Flower Mound. Additional components of the survey sought to identify which communities residents currently shop and dine; including the type of restaurant and how often they dine out per meal per week, and what percentage of their shopping is done through the Internet.

Residents were offered the opportunity to respond to ED by including a completed survey with their utility payment or by US Mail, fax, or on-line via the Town web site. ED extended the deadline until March 30th to provide time for residents whose bills were due at the end of the month.

Demographics

Of the 20,885 surveys distributed, the Town received 1,134 responses (5.43%). It is noted that this level of response is above average for a mailed survey, and indicates resident interest in this topic. Residents utilized all three methods to respond: 51% were mailed, 42% were submitted online and 7% were faxed to the Town. Respondents were not asked to provide any demographic information with the intent to represent responses from a Town-wide perspective, rather than from a specific neighborhood or income bracket.

Summary Results

Retailers/Restaurants:

The Top 25 most requested retailers and restaurants are:

	Retailer	# of Responses	Restaurant	# of Responses
1.	Central Market	380	Cheesecake Factory	171
2.	Whole Foods	282	Olive Garden	160
3.	Bed, Bath & Beyond*	125	PF Chang's	126
4.	Container Store	124	La Madeleine	121
5.	Gap	116	In-N-Out Burger*	117
6.	Market Street	111	Pappadeaux	104
7.	Crate & Barrel	107	Macaroni Grill	91
8.	Pottery Barn	105	Outback Steakhouse	88
9.	Williams-Sonoma	103	Red Lobster	87
10.	Academy	89	Panera Bread	79
11.	Apple*	88	Taco Bueno	65
12.	Trader Joes*	85	BJ's Brewhouse*	63
13.	DSW*	80	Sweet Tomatoes*	63
14.	Costco	71	Salt Grass Steakhouse	59
15.	Macys	69	On the Border	57
16.	Nordstrom	65	Brio Tuscan Grill*	56
17.	Michael's	63	Café Express	54
18.	Dillard's	53	California Pizza Kitchen	53
19.	Half Price Books	44	Cheddar's	51
20.	Nordstrom Rack*	41	Babe's*	50
21.	HEB*	39	Maggiano's*	49
22.	Jo-Ann Fabrics	36	Carrabba's	44
23.	Toys R Us	32	Houston's	42
24.	Anthropologie*	29	Dairy Queen*, Pappasito's, Five Guys Burgers*	37
25.	Babies R Us*	26	(3-way tie)	

*Not previously represented within Top 25 in 2007 survey.

Shopping Habits Summary

Nearly all respondents provided information on where they currently shop. They had the option to list as many municipalities as desired, including Flower Mound. More than 77% of respondents indicated that they shop locally in Flower Mound, which ranked higher than total responses for other communities. Seventeen other communities were listed, and of the 70% that listed other communities, Lewisville ranked the highest, followed by Highland Village, Southlake and Grapevine.

Where do you regularly shop?

Municipality	Percentage
Flower Mound	77%
Other	70%
<i>Lewisville</i>	<i>34%</i>
<i>Highland Village</i>	<i>32%</i>
<i>Southlake</i>	<i>24%</i>
<i>Grapevine</i>	<i>13%</i>

Totals exceed 100% due to multiple responses.

It is also interesting to note that 73% of respondents are shopping online with an average of 19% of all retail purchases. Of all respondents, 10% indicated that they did not do any shopping online and 17% did not provide a response to the question, which could imply that they do not shop online.

Percentage of shopping completed online:

Online Shopping	Percentage
Shop online 1-5%	27%
Shop online 10-20%	40%
Shop online 25-45%	22%
Shop online 50-75%	11%
Shop online 80-95%	> 1%
Average	19%

Dining Habits Summary

A majority of respondents provided information on where they currently dine. They had the option to list as many municipalities as desired where they dined, including Flower Mound. More than 81% of respondents indicated that they dine locally in Flower Mound, which ranked higher than the total responses for other communities. Twenty three other communities were listed, and of the 73% that listed other communities, Lewisville ranked the highest, followed by Highland Village, Grapevine and Southlake.

It is noteworthy that the number of times respondents dined out increased to an average of 4.7 times per week, up from an average of 3 times per week in the 2007 survey.

Where do you regularly dine out?

Municipality	Percentage
Flower Mound	81%
Other	73%
<i>Lewisville</i>	<i>34%</i>
<i>Highland Village</i>	<i>27%</i>
<i>Grapevine</i>	<i>20%</i>
<i>Southlake</i>	<i>18%</i>

Totals exceed 100% due to multiple responses.

Frequency of dining out per week:

Meal	Percentage	Per Week Average
Breakfast	13%	2
Lunch	42%	3
Dinner	45%	5
Average Per Week		4.7

Meal details:

Breakfast		Lunch		Dinner	
Percentage	Per Week Average	Percentage	Per Week Average	Percentage	Per Week Average
28%	1	66%	1	25%	1
32%	2	22%	2	37%	2
17%	3	7%	3	23%	3
23%	4-7	5%	4-7	15%	4-7

- Of 439 responses, 38% eat out for breakfast at least once a week.
- Of 893 responses, 79% eat out for lunch at least once a week.
- Of 1018 responses, 90% eat out for dinner at least once a week.

What kinds of restaurants do you prefer dining at?

Type of Establishment	Percentage
Casual/Family Dining	88%
Café	49%
Fine Dining	43%
Fast Food	32%
Pub/Sports Bar	24%

Summary Comments

Numerous comments and requests were made on a variety of related topics. The most prevalent comments are listed below.

- ▶ Need upscale grocery stores such as Central Market, Whole Foods and Market Street.
- ▶ Need wider selection of upscale restaurants and shops, rather than the prevalent chains and retail discount stores.
- ▶ Need fine dining opportunities and upscale bars for nice evening out.
- ▶ Need places with outdoor eating options.
- ▶ Need nice dining options along the lake offering a lake view.
- ▶ Flower Mound is a ghost town after 8:30pm. We need hip, fun restaurants and shopping to attract and keep our residents here at night and on weekends.
- ▶ Need more restaurants at FM 3040 and FM 2499, as well as southern Flower Mound.
- ▶ Would be nice to see shopping, restaurants, entertainment destinations, parks and trails to be built along FM 2499 in the southern end of Town.
- ▶ Parker Square needs to be revitalized to be a destination for national retailers with a proven brand to attract customers who might also frequent the local businesses currently in the Square.
- ▶ Would like nice steak house and/or seafood restaurant.
- ▶ Tired of chain restaurants.
- ▶ Need Organic food retailers and healthier dining/vegetarian options.
- ▶ Don't need any more restaurants or retailers. We have enough.

Summary Findings

Residents are shopping and dining in Flower Mound more frequently than other surrounding communities. They are also purchasing products online at a growing rate. Many commented that they are finding what they need except for an upscale grocer such as Central Market or Whole Foods. They also commented that they enjoy the outdoor shopping experience in Highland Village on the northwest corner of FM 407 and FM 2499 and would like to see something similar in Flower Mound.

Additionally, there were requests for retailers and restaurants that already exist in Flower Mound such as Best Buy, Einstein Bros. Bagels, Home Depot, JC Penney, Kohl's, Le Peep, Lifeway Christian Bookstore, Mi Cocina, Office Max, Starbucks, Taco Bell, and World Market. This indicates that either these requests are for a second location, or the awareness of these stores does not exist to some residents.

Survey results identified a need to recruit retailers and restaurants that serve families with children. This is consistent with Flower Mound's demographics reflecting a median age of 34, and 56% (11,207) married households having at least one or more children under the age of 18.

Respondents identified stores such as Babies R Us, Buy Buy Baby, Gap Kids, Gymboree, Toys R Us, and Pottery Barn Kids. Family-oriented restaurant suggestions include Dairy Queen, In-N-Out Burger, Olive Garden, Panera Bread and Macaroni Grill. They also want local places to go for family entertainment such as a movie theater, miniature golf, a bowling alley, an ice rink and a skating rink.

Residents also want upscale retailers and restaurants such as Apple, Coach, Crate & Barrel, La Madeleine, Nordstrom's, Pottery Barn, Ruth's Chris Steak House, Truluck's, Ill Forks, and Williams-Sonoma. They also want places to dine outdoors and to have options for dining by the lake.

Many of the retailers and restaurants requested in the 2007 survey once again made the Top 25 in the 2011 survey. There are also new additions to the retailer Top 25 this year, including (*in order*) Bed, Bath and Beyond, Apple, Trader Joe's, DSW Shoe Warehouse, Nordstrom Rack, HEB, Anthropologie and Babies R Us. New additions to the restaurant Top 25 list include (*in order*) In-N-Out Burger, BJ's Brewhouse, Sweet Tomatoes, Brio Tuscan Grill, Babe's, Maggiano's, Dairy Queen and Five Guys Burgers.

Since the last survey, Old Navy, listed in the Top 25 most requested retailers from the 2007 survey, has located to Flower Mound. Additionally, three of the Top 25 restaurants have also located in Flower Mound: Chipotle Mexican Grill, Einstein Bros. Bagel and Schlotzsky's Deli.

It is also noteworthy to mention that five retailers and three restaurants on the previous Top 25 list have located in Highland Village to serve the Flower Mound trade area. They are Barnes & Noble, Banana Republic, Bath & Body Works, Corner Bakery, Hallmark, Pei Wei, Victoria's Secret and Whataburger. It may be possible to capture an additional store location at the southern or western area of town in the future.

Conclusion

Based on the results of the citizen survey, there are still many opportunities to attract new restaurants and retailers to Flower Mound that are preferred by residents. It is anticipated that this information will be helpful to recruit desired establishments, given that residents would be more likely to visit the targeted restaurants and retailers, which could potentially contribute to the business' longevity and success.