

NEXTGEN INDY





How does Gen Z See Indy?

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Purpose

- Analyze Gen Z's opinions of Indianapolis on the different attributes it offers as a city
- Identify attributes Gen Z believes is most important in the place they live
- Assess Gen Z perceptions of Indy on those attributes
- Compare Indy to 8 peer markets as a destination to travel or relocate

Methodology

Methodology

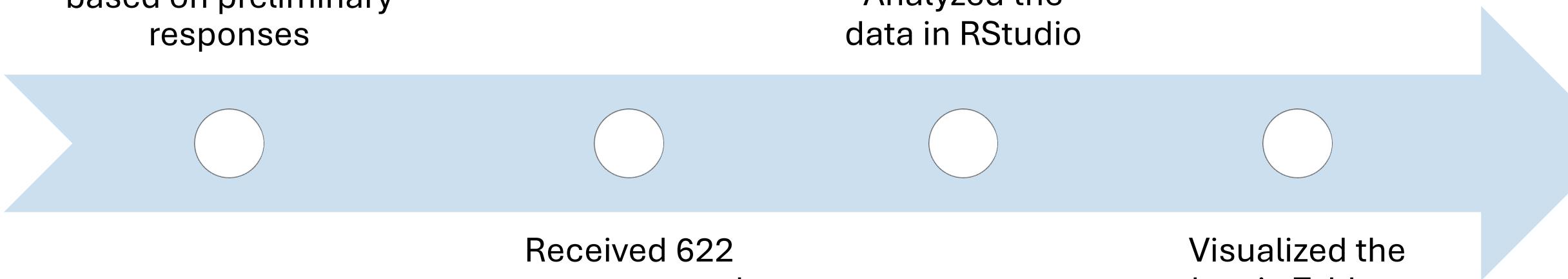
Interviewed 40 members of Gen Z to see what influences where they choose to live

Created a preliminary Qualtrics survey to send to beta-testers for feedback

Used natural language processing tools to find common themes from the interviews

Edited survey based on the feedback and sent it out for initial public responses

Methodology



Made some minor changes to ensure the best quality of responses based on preliminary responses

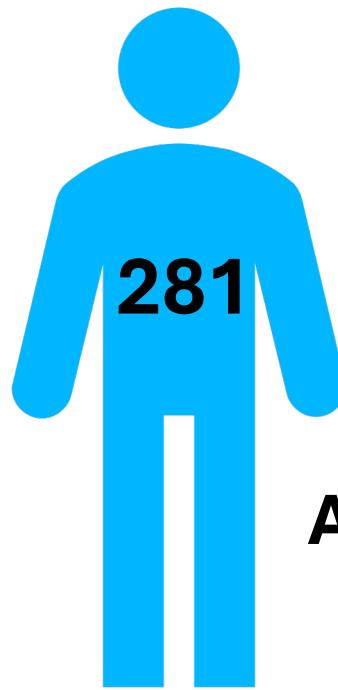
Analyzed the data in RStudio

Received 622 responses and narrowed it down to 566 responses to analyze

Visualized the data in Tableau

Survey Respondents

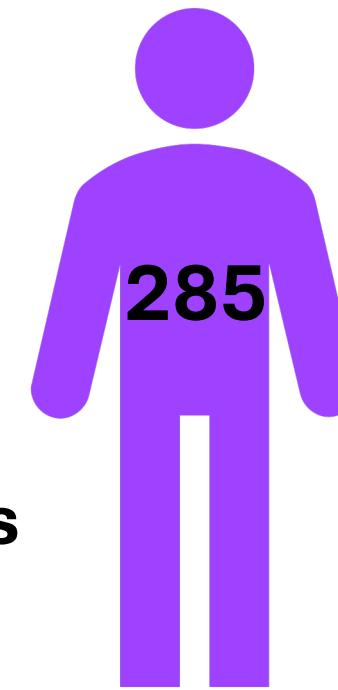
Residents



281

All respondents in their 20s

Non-Residents



285

National sample
from 42 states

At least
"somewhat
familiar with Indy"

Currently live in
Urban or
Suburban
location

Respondents Demographics

Female
68%

Caucasian
44%

HS/GED
33%

25-50K
27%

Never Married
52%

Male
32%

African
American
30%

Bachelor's
Degree
22%

50-75K
21%

Living with
Partner
21%

Survey

Practical

- Cost of Living
- Job Opportunities
- Safety
- Ease of Getting Around

Lifestyle

- Night Life
- Sports Scene
- Food Scene
- Music Scene
- Festival and Fairs
- Cultural Attractions
- Recreation and Leisure
- Outdoor Space

Perception

- Vibes of the City
- Up & Coming
- Uniqueness
- Vision for the City

Each attribute scored on 1-7 Likert-Scale for IMPORTANCE and PERFORMANCE

Qualtrics Survey Questions for Each Attribute

1 Not important at all	2 Very little importance	3 Somewhat important	4 Moderately important	5 Considerably important	6 Very important	7 Utmost importance
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When deciding on where to live, how important is **cost of living**?

1 - Not important at all

2 - Very little importance

3 - Somewhat important

4 - Moderately important

5 - Considerably important

6 - Very important

7 - Utmost importance

1 Far below average	2 Moderately below average	3 Slightly below average	4 Average	5 Slightly above average	6 Moderately above average	7 Above and beyond
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Rate how well Indianapolis is doing on **cost of living**.

1 - Far below average

2 - Moderately below average

3 - Slightly below average

4 - Average

5 - Slightly above average

6 - Moderately above average

7 - Above and beyond

Attributes were ranked to ensure a broad distribution of importance scores (Abalo et al., 2007)

Drag and drop **at least three** items from the left. Rank them in order of importance on the right. (1 = most important)

Items

Nightlife and bar offerings

Cultural learning and attractions

Festivals, fairs, and special events

Food and restaurant scene

Recreation and leisure activities

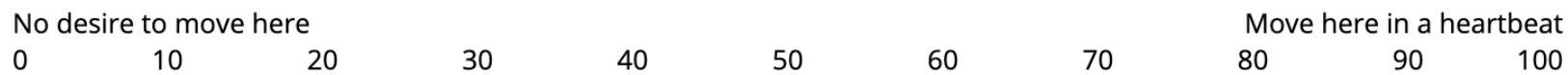
Outdoor activity spaces

Live music scene

Sport event offerings

Drag here

Based on all the factors talked about in this survey, if you were considering **moving** to a new Midwestern urban area, rate each of the following on a scale of 0-100.



Nashville, TN



Louisville, KY

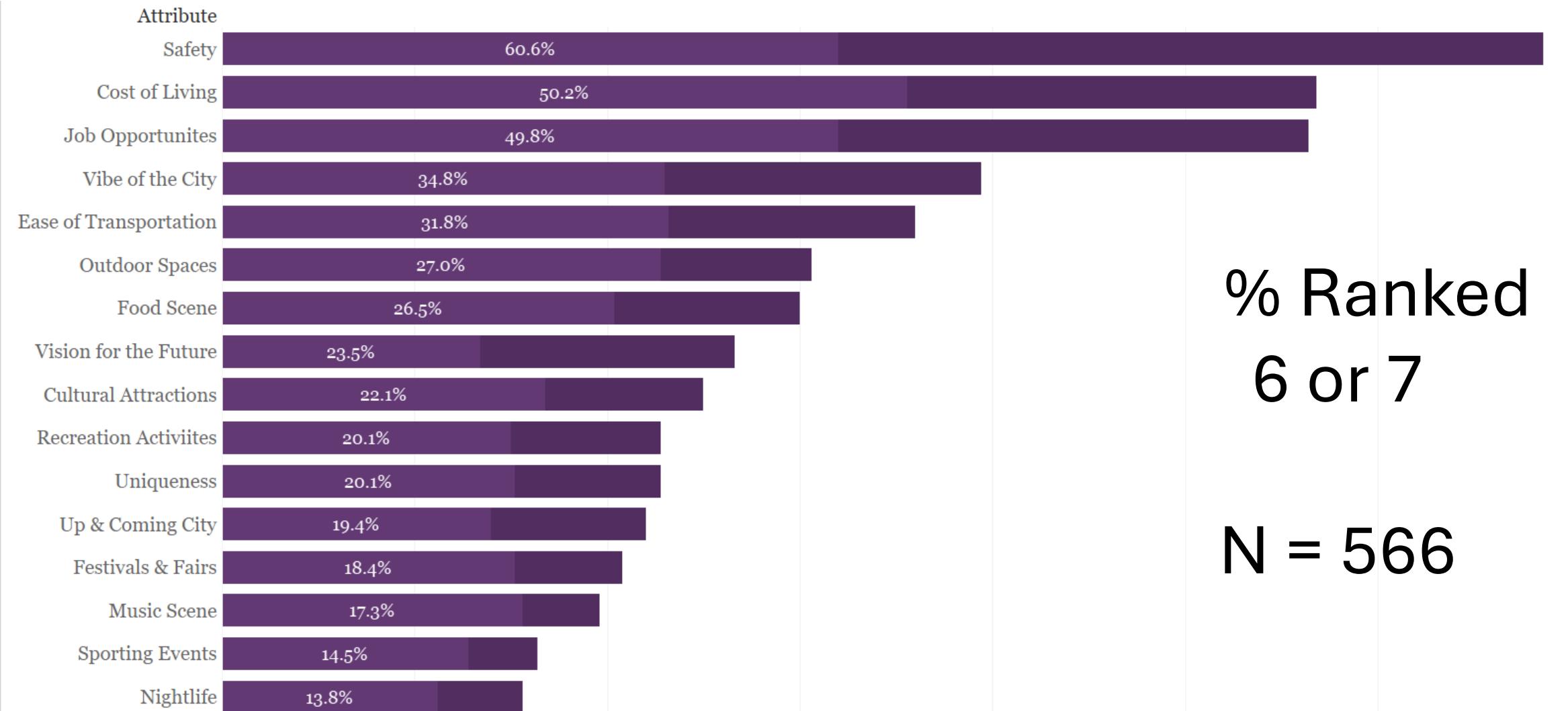


Chicago, IL



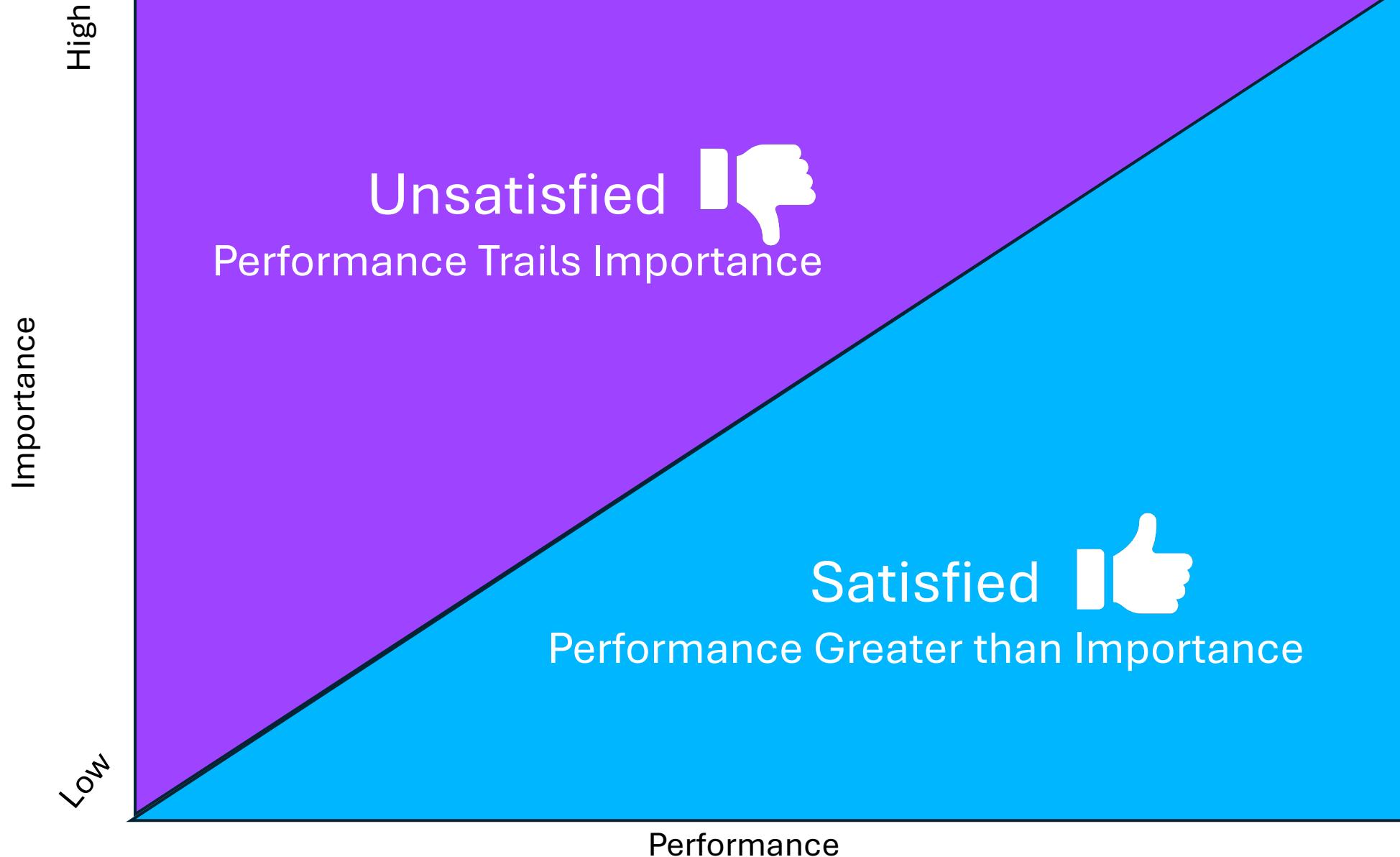
Results

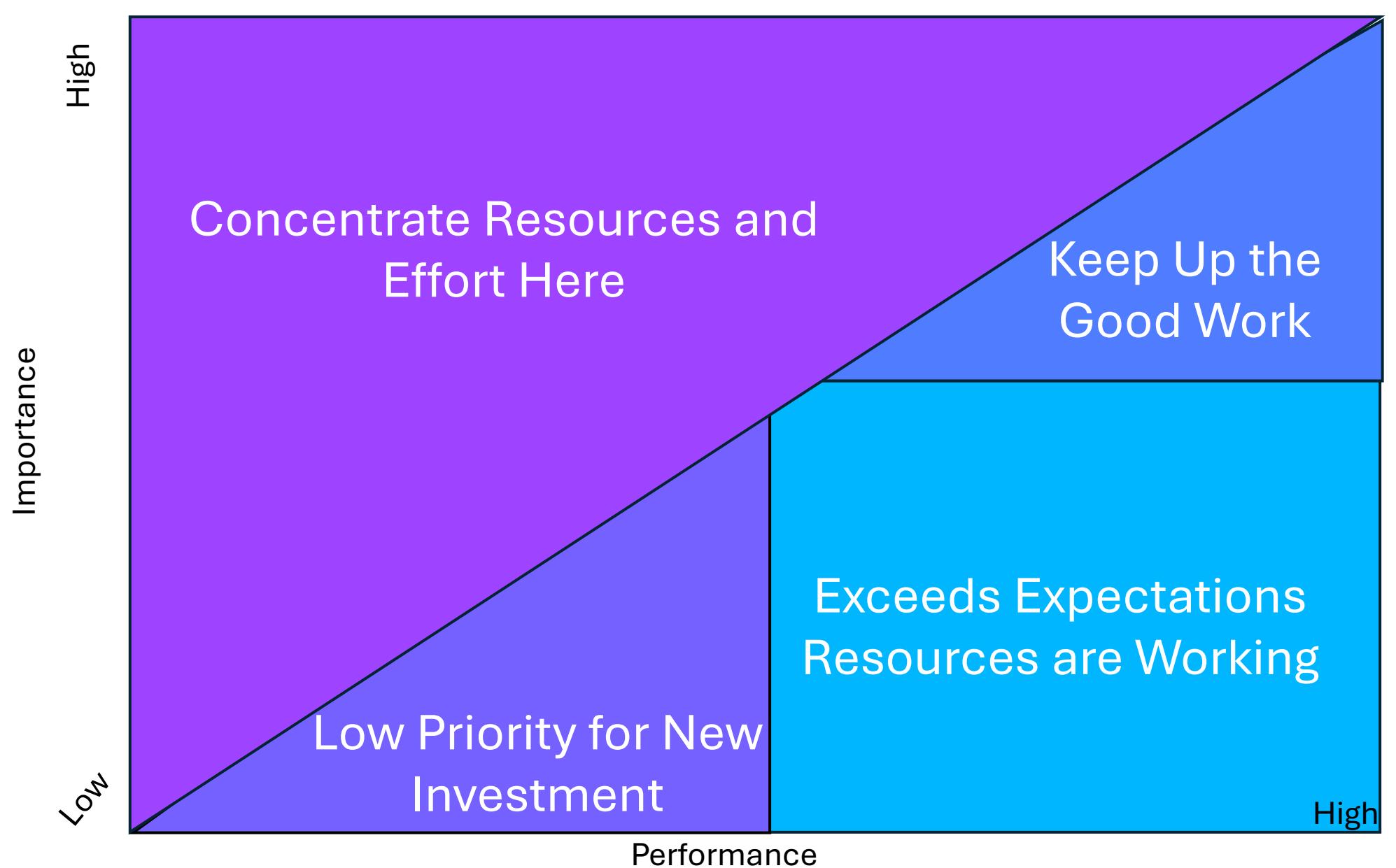
What Gen Z Deems Most Important

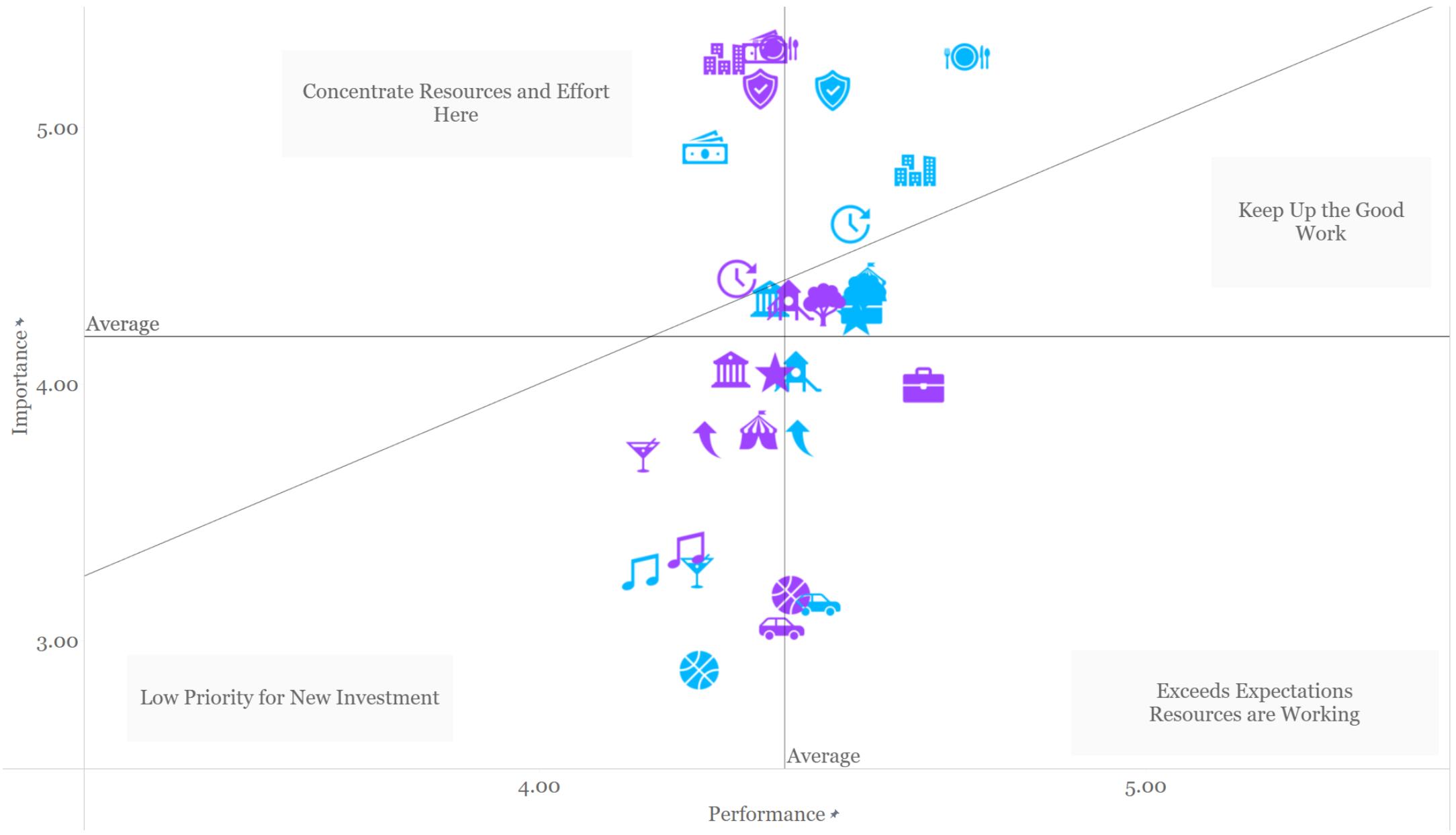


Importance-Performance Analysis

- **Importance-Performance Analysis (IPA)** is used to measure a consumer's satisfaction with a particular product or service through importance and performance (Das et al., 2021)
- IPA from the policy perspective puts service quality and improvement prioritization on a graph (Das et al., 2021)



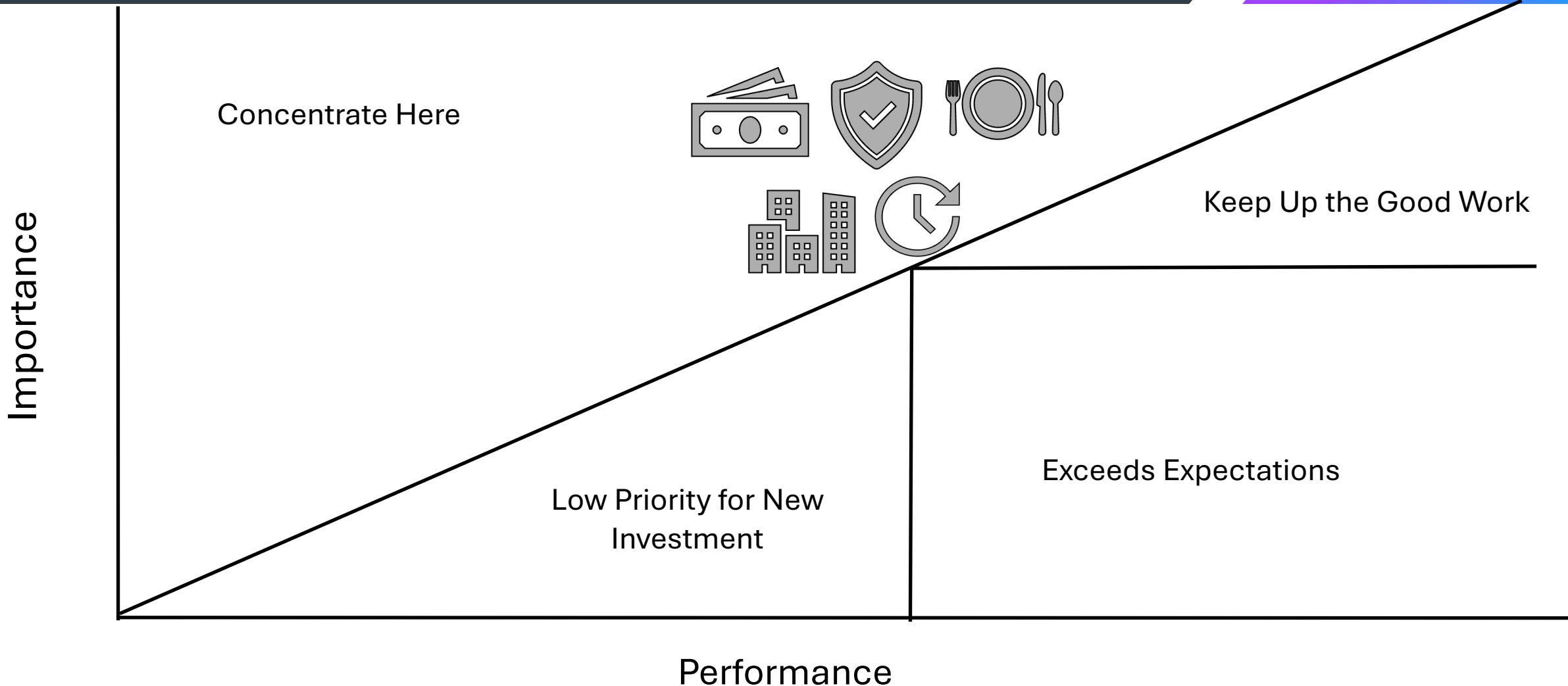




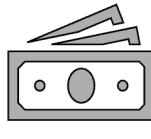
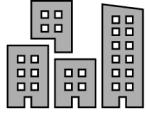
IPA Results

Resources Needed for Continued Investment

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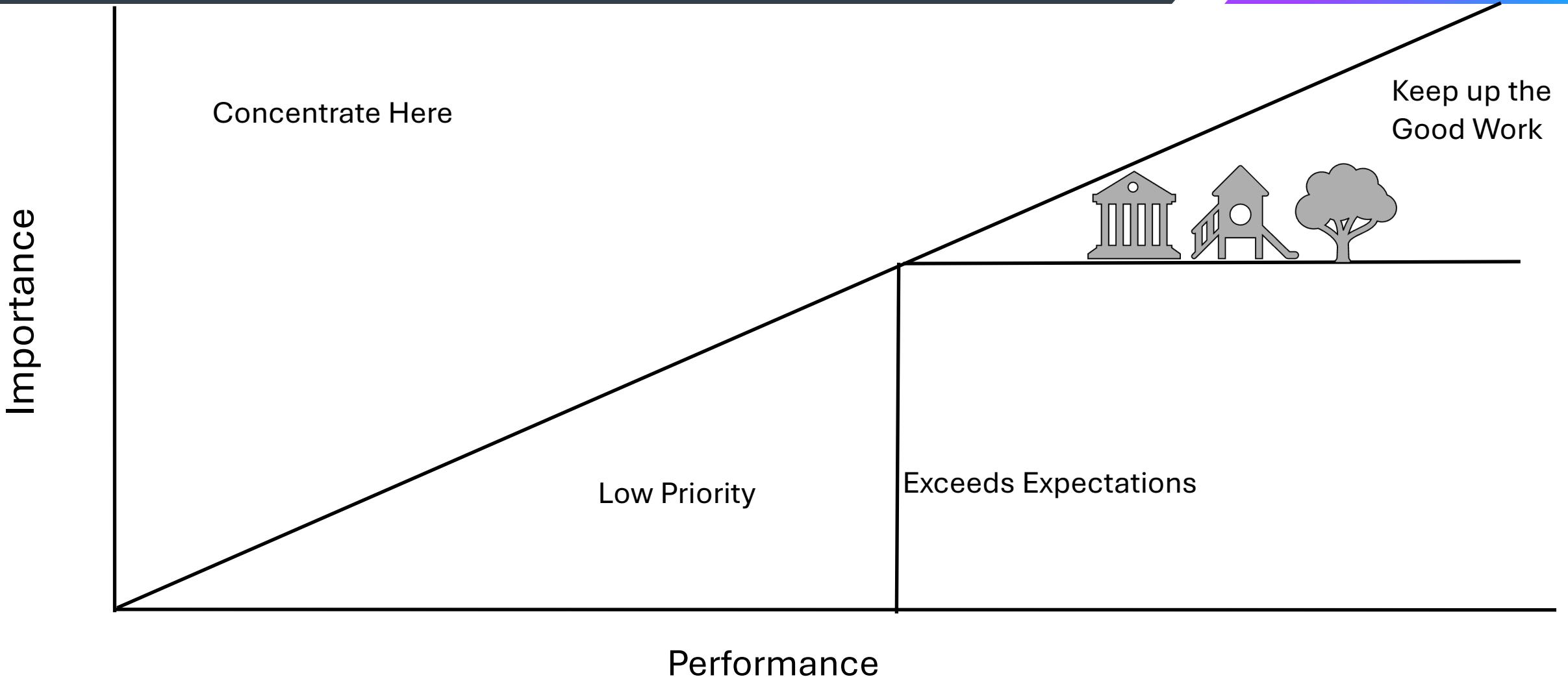


Focus Effort and Resources

Safety	Cost of Living	Vibe of Indy	Vision for Indy	Food Scene
				
<ul style="list-style-type: none">Ranked at the top of most important attributesAlways a top priority for cities, Indy is no differentSame result for all groupsResidents scored performance higher than non-residents (+.12)	<ul style="list-style-type: none">Most important attributeNon-residents deemed it more important than residents (+.39)Always a top priority for all locations	<ul style="list-style-type: none">Most important "Perception" attribute2nd Highest Performance of all attributes for residentsResidents scored performance higher (.31) and were close to moving into "Keep Up the Good Work"	<ul style="list-style-type: none">Residents scored both importance (+.20) and performance higher (.18)Just above the diagonal lineVery close to moving into "Keep Up the Good Work"	<ul style="list-style-type: none">Most important Lifestyle attributeHighest attribute on performance for residentsContinued investment and creativity will be valued by residentsPerformance seen as better by Residents than Non-Residents (.31)

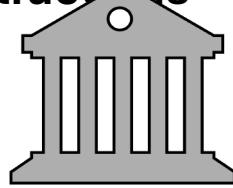
Keep up the Good Work

Keep up the Good Work



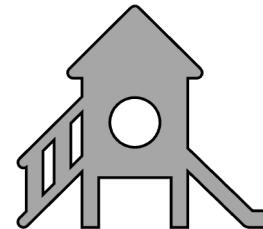
Keep up the Good Work

Cultural Attractions



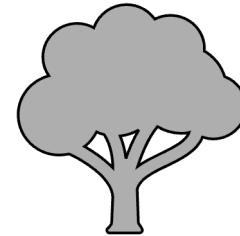
- Quantity and Quality of cultural attractions exceeds expectations
- Residents scored importance higher (+.27)
- Performance were similar for residents and non-residents

Recreation Activities



- People are happy with "chill-actions" within Indy
- Non-residents scored importance higher (+.28)

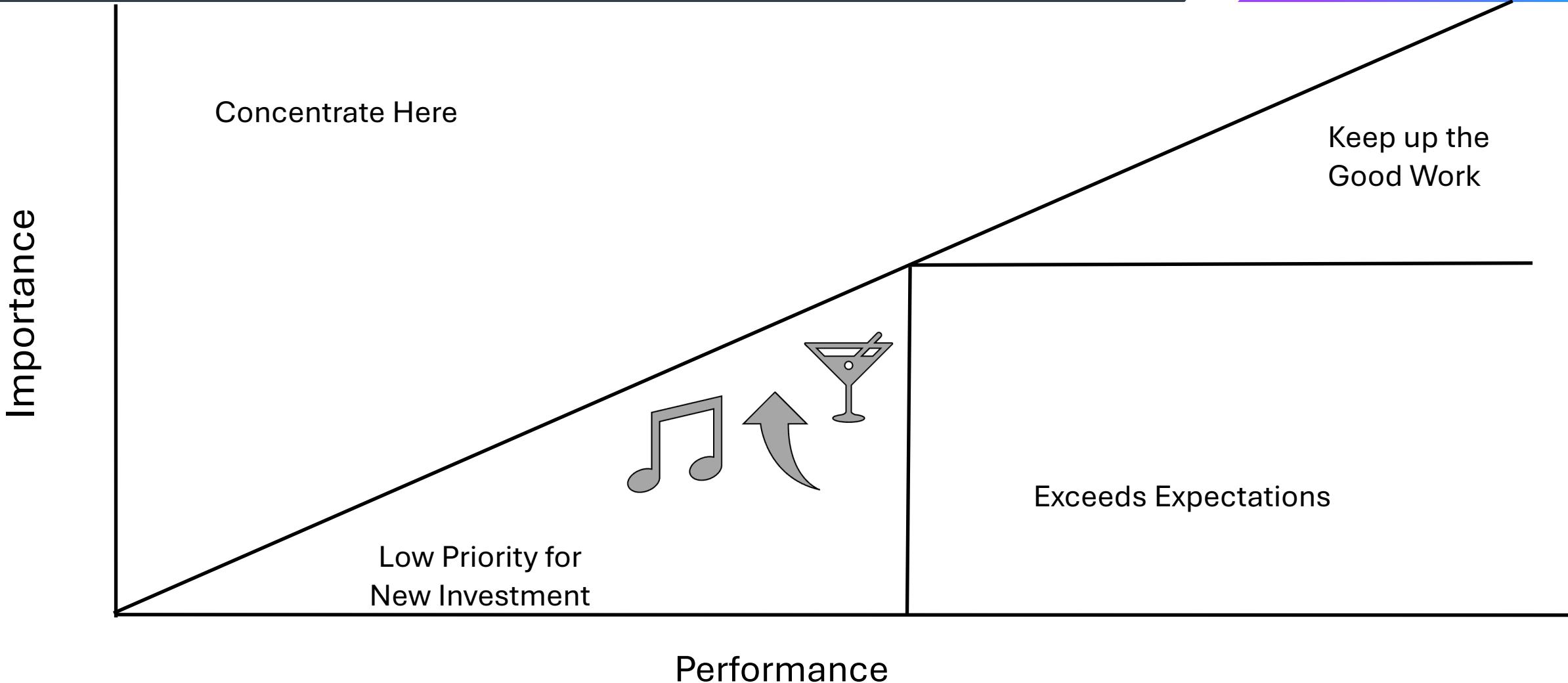
Outdoor Spaces



- Scored were very similar for both performance and importance
- Residents and non-residents have comparable opinions

Low Priority for New Resources

Low Priority for New Resources



Low Priority for New Resources

Music Scene



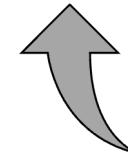
- Scored very similarly between the two groups for both performance and importance
- Less than .1 difference between each
- Not a major influencer when deciding where to live

Night Life



- Non-residents scored importance higher (+.45)
- Residents scored performance slightly higher (+.1)
- Not a major influencer when deciding where to live

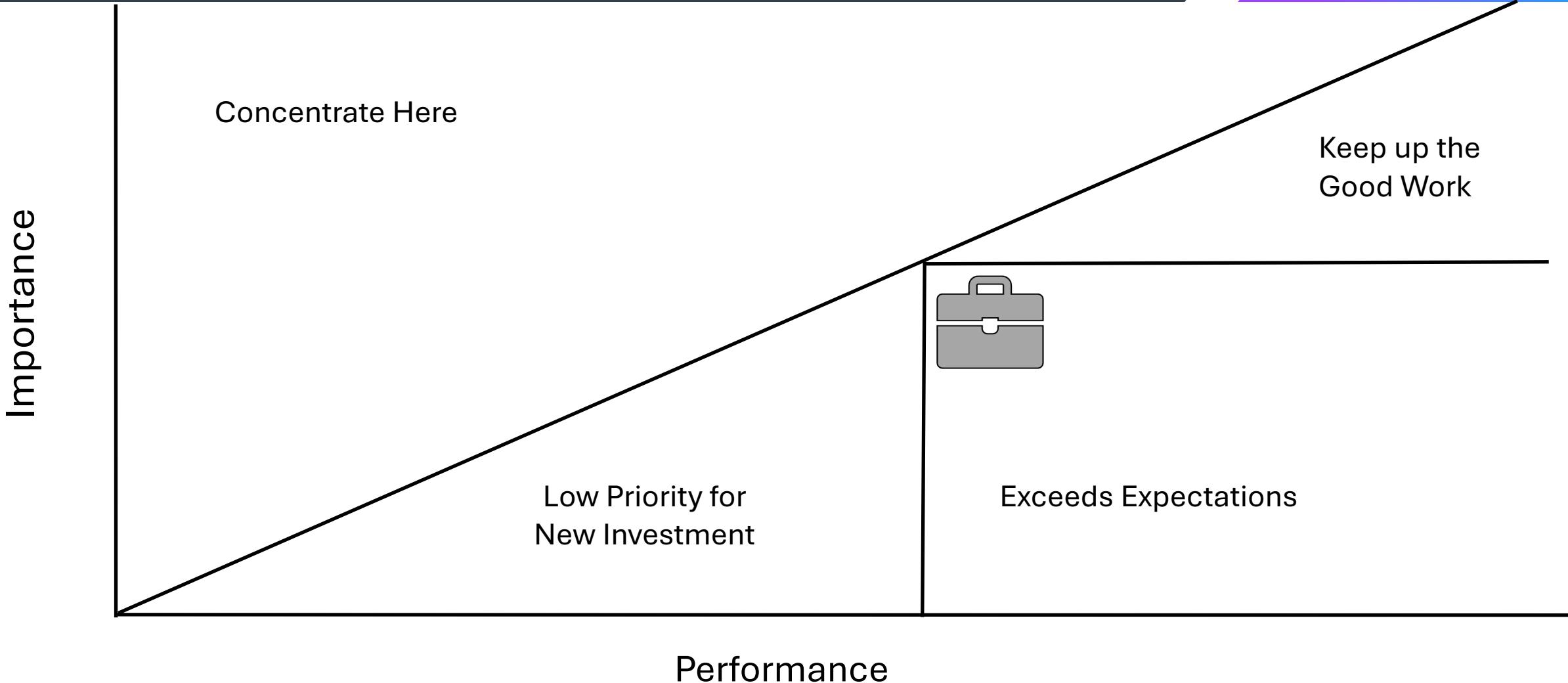
Up & Coming



- Least important Perception attribute for both residents and non-residents.
- Residents scored performance slightly higher (+.15)
- Low importance when deciding where to live

Exceeds Expectations
Resources are Working

Exceeded Expectations



Exceeded Expectations

Job Opportunities



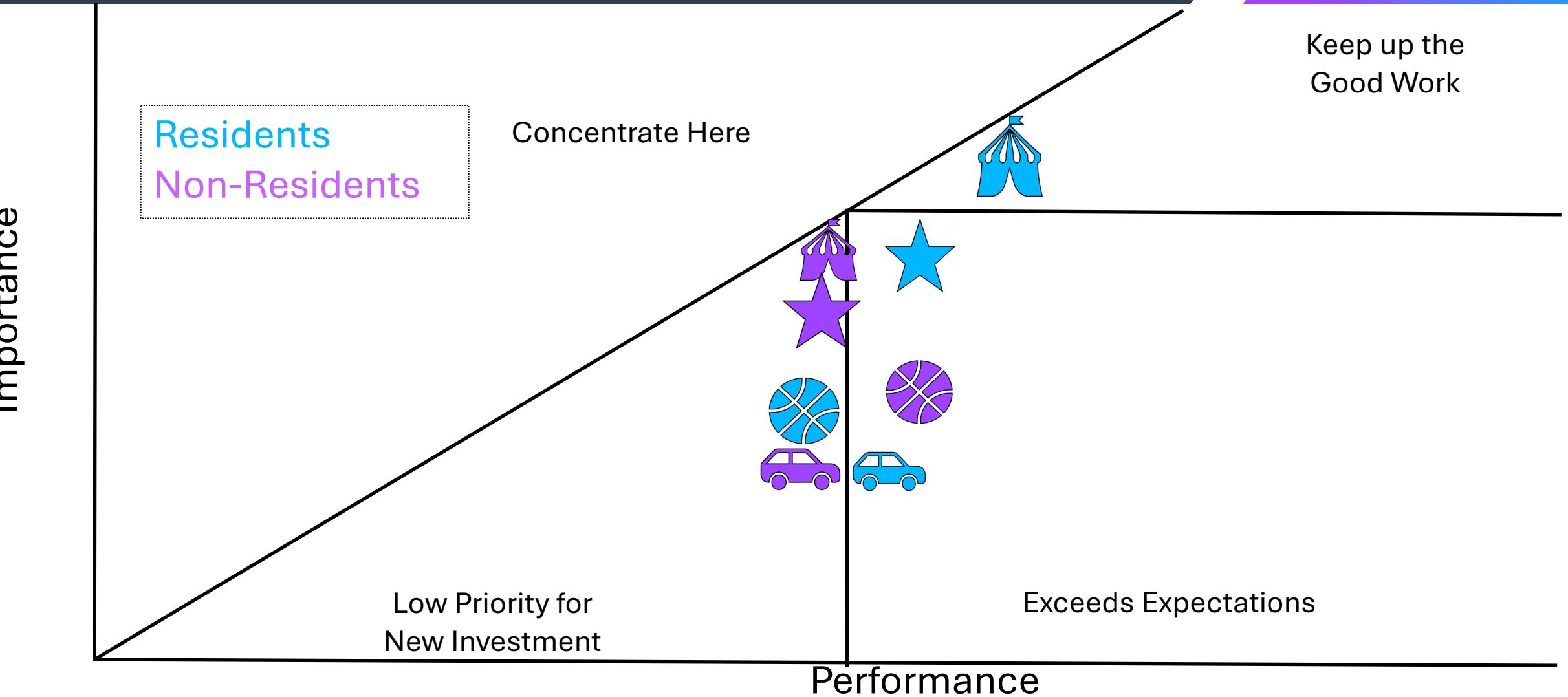
- Investment made by city and state leaders in business development and job growth is paying off as it relates to perception of Gen Z.
- One of the few factors where non-resident perception exceeds that of residents (+.1)
- Same category interpretation for those who are strongly considering moving to Indy.
- Very strong perception amongst Gen Z.



○ Attributes that Changed Interpretation based on Residency Status



Changed Interpretation



Changed Interpretation

Uniqueness



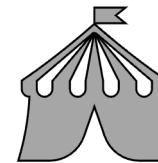
- Residents scored higher for both importance (+.22) and Performance(+.13)
- Residents were in "Exceeds Expectations"
- Non-Residents were in "Low Priority"

Ease of Transportation



- Residents scored slightly higher on both performance and importance
- Residents and those scoring high on willingness to move to Indy were in "Exceeds Expectations"
- Non-residents were in "Low Priority"

Festivals & Fairs



- Residents scored higher on importance (+.58) and performance (+.18)
- Residents were in "Keep Up the Good Work"
- Non-residents were in "Low Priority"

Sports Events



- Non-residents scored higher on importance (+.3) and performance (+.15)
- Indianapolis has established a reputation with non-residents as a sports city

City Comparison Questions Results

Tourism Score Scoreboard

NASH	59	IND	47	MIL	41
CHI	58	STL	44	CBUS	41
				CIN	40
				DET	40
				LOU	39

MEAN SCORE FOR ALL CITIES 45/100

Indy Performs Best with...

- Those who are very familiar with Indy
- Those who get their information about Indy from Sports or Social Media
- Males

Relocation Scoreboard

NASH	48	STL	36	LOU	32
CHI	44	CBUS	36	DET	31
IND	43	MIL	35		
		CIN	35		

MEAN SCORE FOR ALL CITIES 38/100

Indy Performs Best with...

- Those who are very familiar with Indy
- Males –
 - Leads all Cities in Average Male Relocation score
- Married
- Non-Caucasian
- Those who get their information about Indy from Sports

Tableau Public Link

- <https://public.tableau.com/app/profile/iui.sii/viz/HowDoesGenZSeeIndy/HowDoesGenZSeeIndy>



Thank You

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