West Coast Urban District Forum

LONG BEACH, 2017

IDA

CALIFORNIA DOWNTOWN ASSOCIATION

DOWNTOWN LONG BEACH ALLIANCE

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Market Research: From Data to Insight to Action

Wednesday, March 15 | 10:30am – 12:00pm

Moderator:

Austin Metoyer, Research and Policy Manager, DLBA

Speakers:

Richard Bernard, Fairbank, Maslin, Maullin, Metz & Associates

Stephen Groner, Principal, S. Groner Associates, Inc.

Benefits of Public Opinion Research

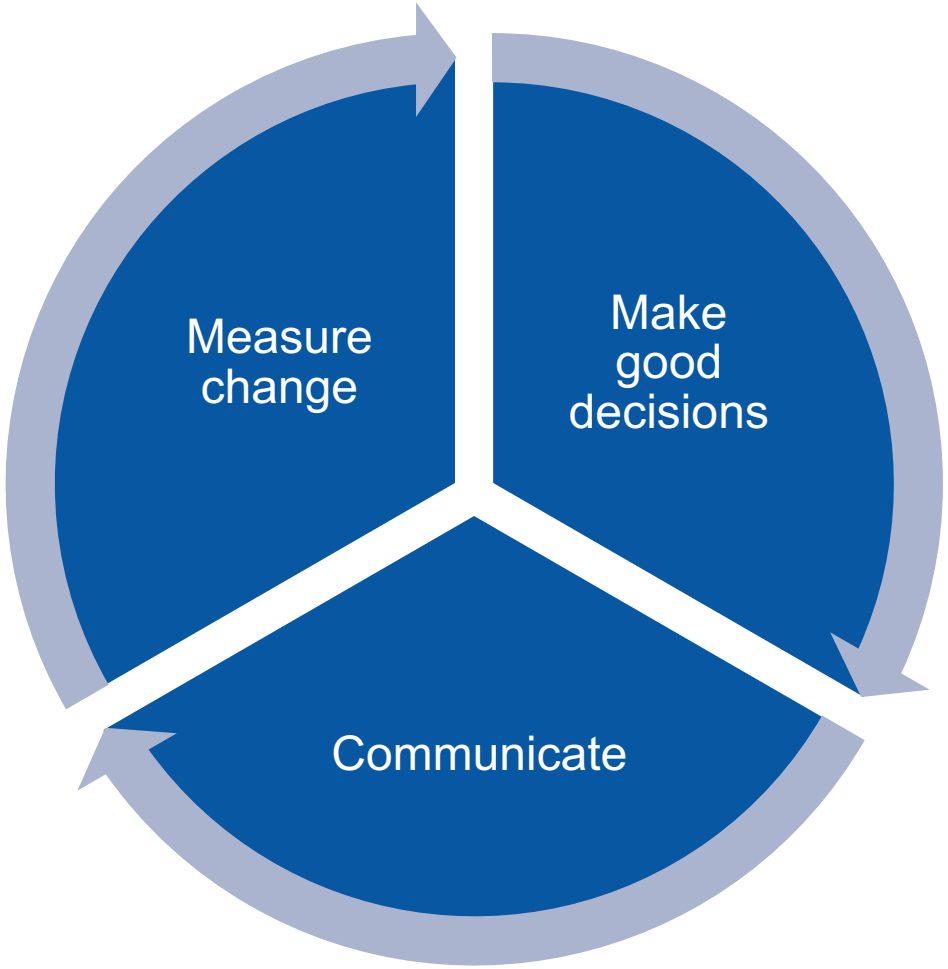
Presented by

Richard Bernard, Ph.D.

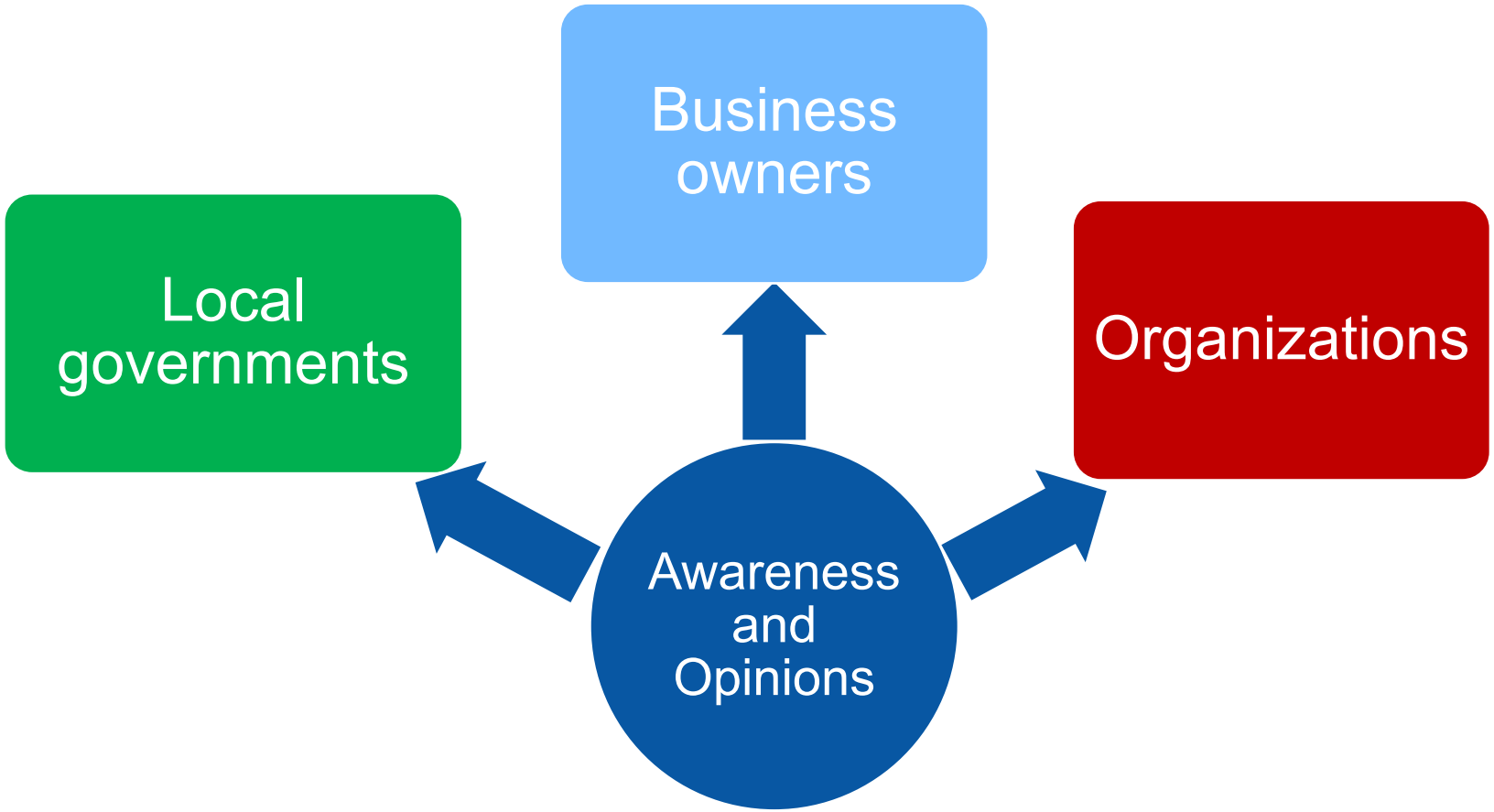
March 15, 2017

Fairbank, Maslin, Maullin, Metz & Associates – FM3
PUBLIC OPINION RESEARCH & STRATEGY

Benefits of Public Opinion Research

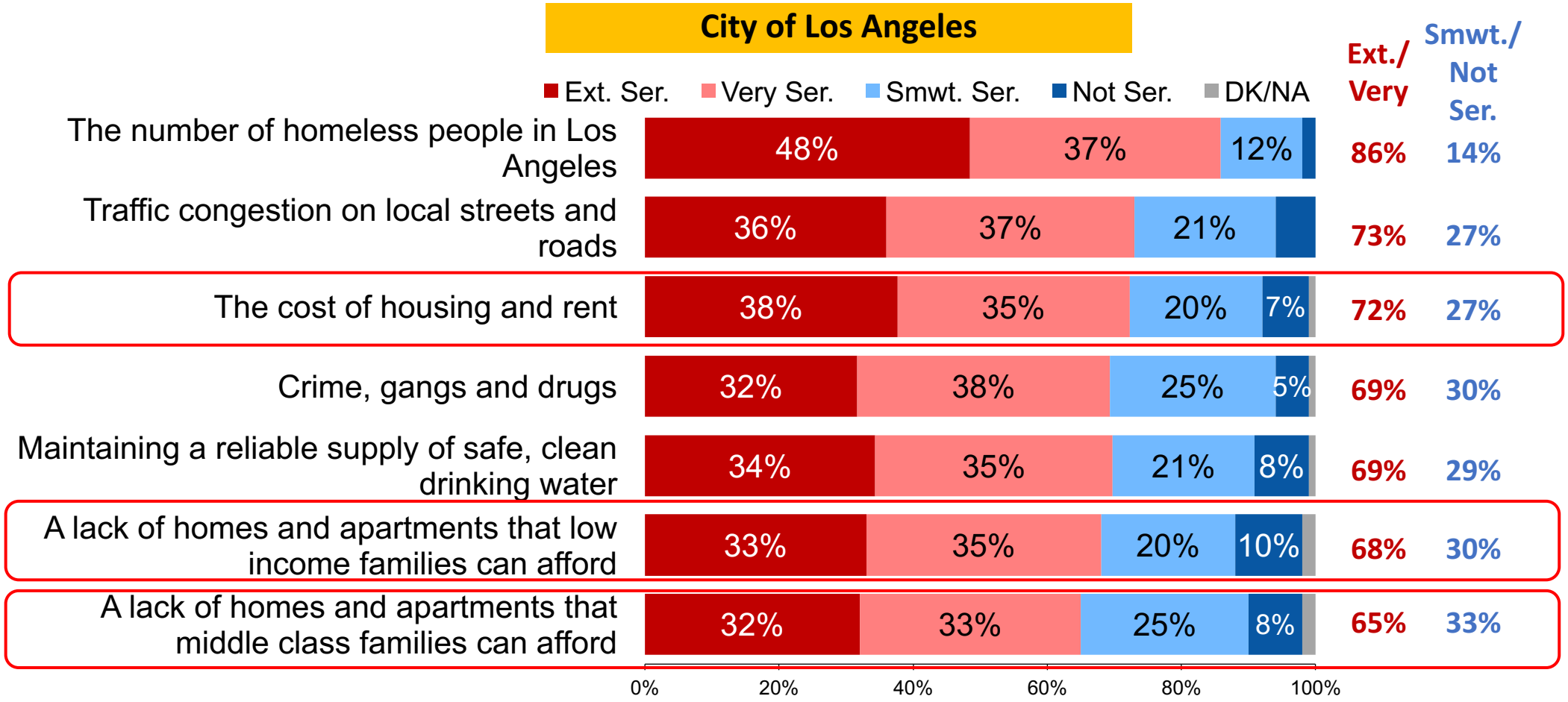


Public opinion research improves decision making for governments, organizations and business owners



Cases Studies of Research for Local Governments

Identifying the most serious problems in the minds of residents is an important starting ground for understanding their perspectives.

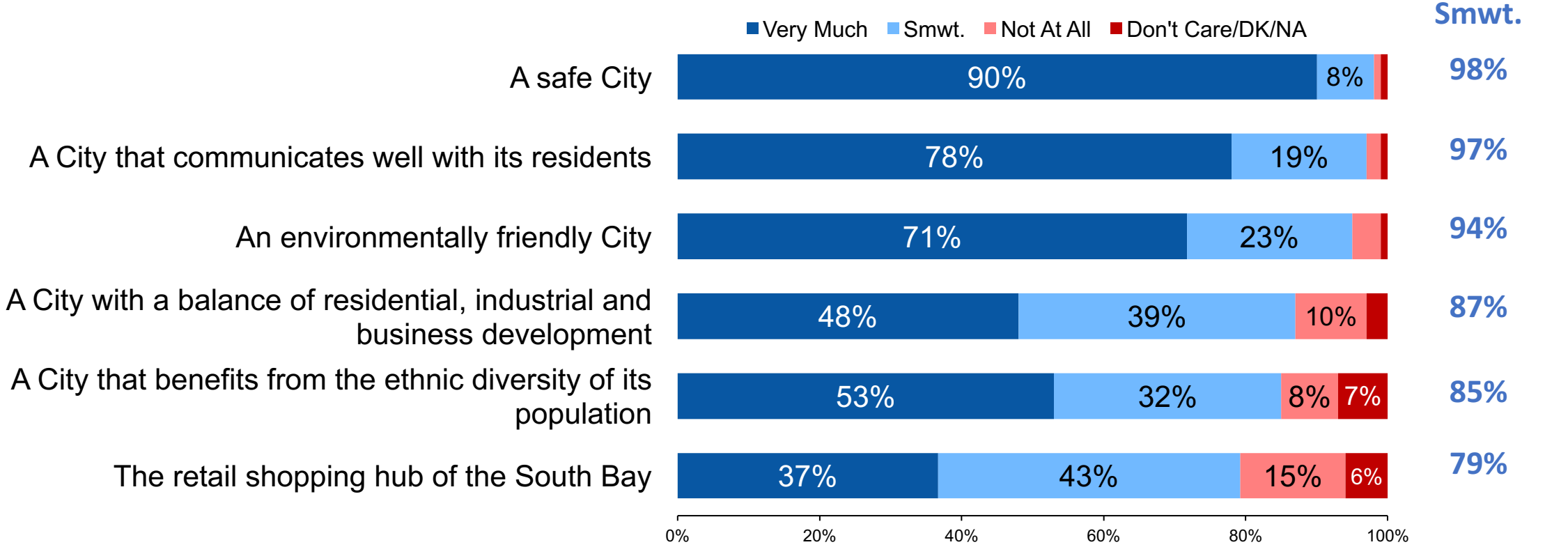


I am going to read a list of issues facing the City of Los Angeles that have been mentioned by local residents. Please tell me whether you consider it to be an extremely serious problem, a very serious problem, a somewhat serious problem, or not a serious problem at all for Los Angeles residents.

Survey questions can be used to understand residents' visions and goals for a community.

City of Torrance - Residents

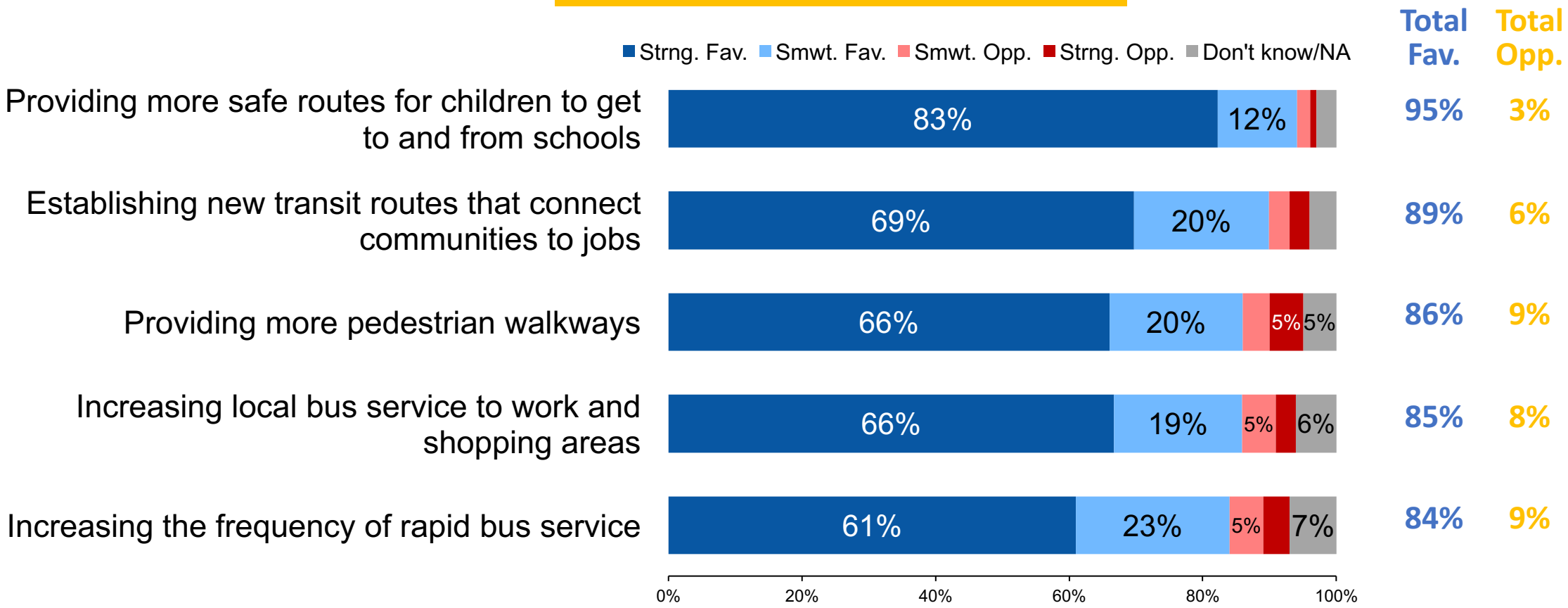
(Ranked by Total Very and Somewhat)



5. I would like to read you some phrases and ask you to think about what you personally want the City of Torrance to be like in the year 2018. First, how much do you personally want to see the City of Torrance be… in the year 2018? Do you want that very much, somewhat or not at all?

Local city governments working together can gain an understanding of regional issues.

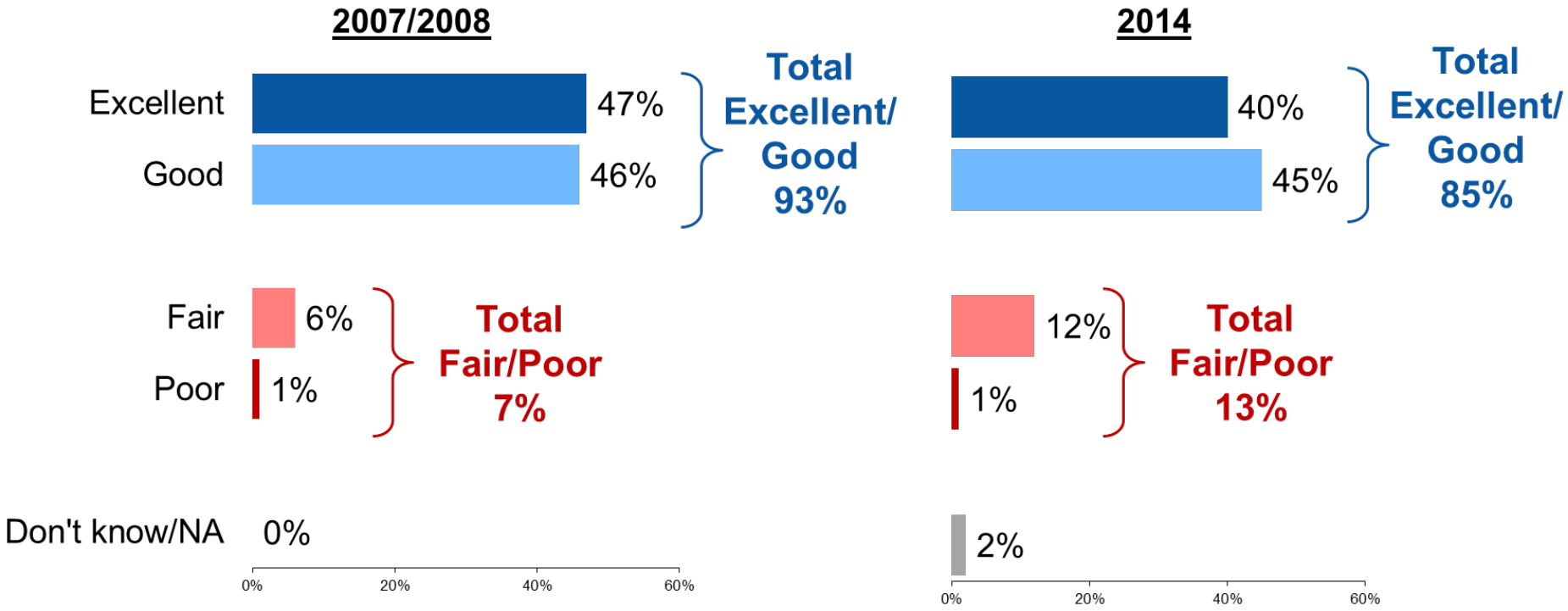
Southern Nevada



In Torrance, the City also measures the views of local businesses over time.

City of Torrance – Business Survey

Generally speaking, how would you rate Torrance as a place to do business: is it an excellent place to do business, a good place, just fair, or a poor place to do business?



Q1.

Location, quality of life, and being business-friendly topped the reasons for viewing Torrance's business environment positively

City of Torrance – Business Survey

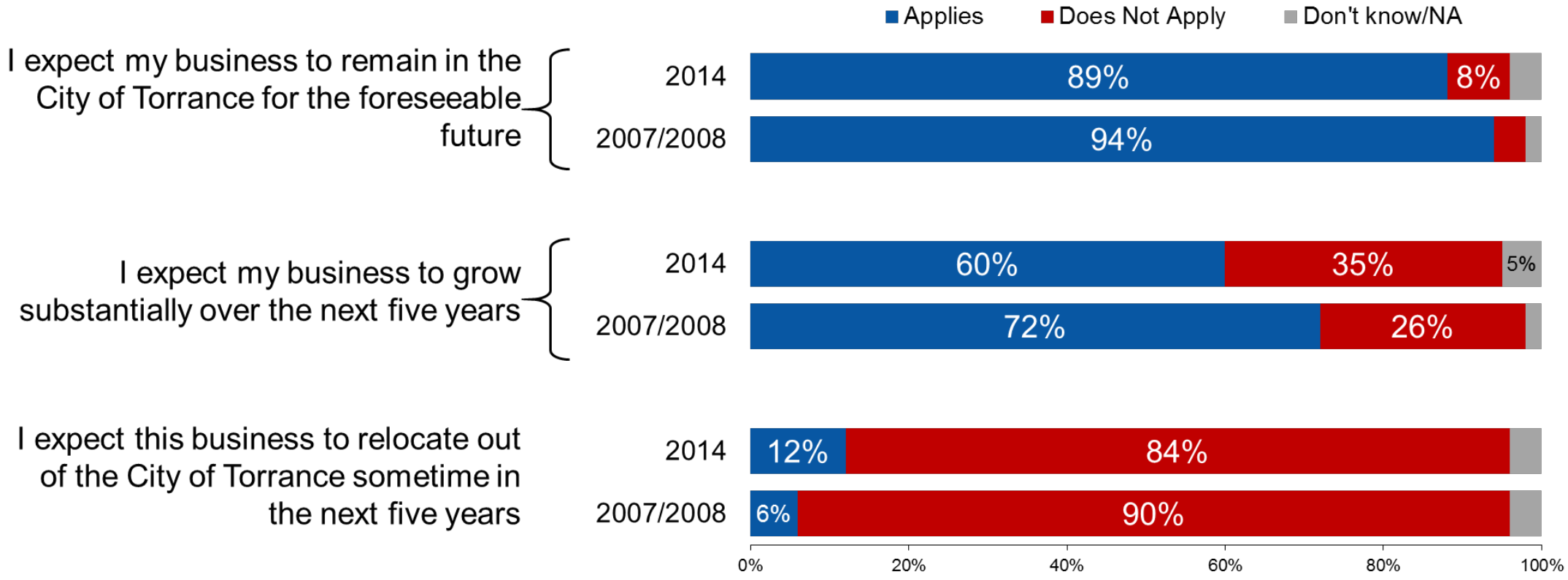
In your own words, why do you say that?

Q2a. Open Ended

The City also used research to understand the future outlook of local businesses.

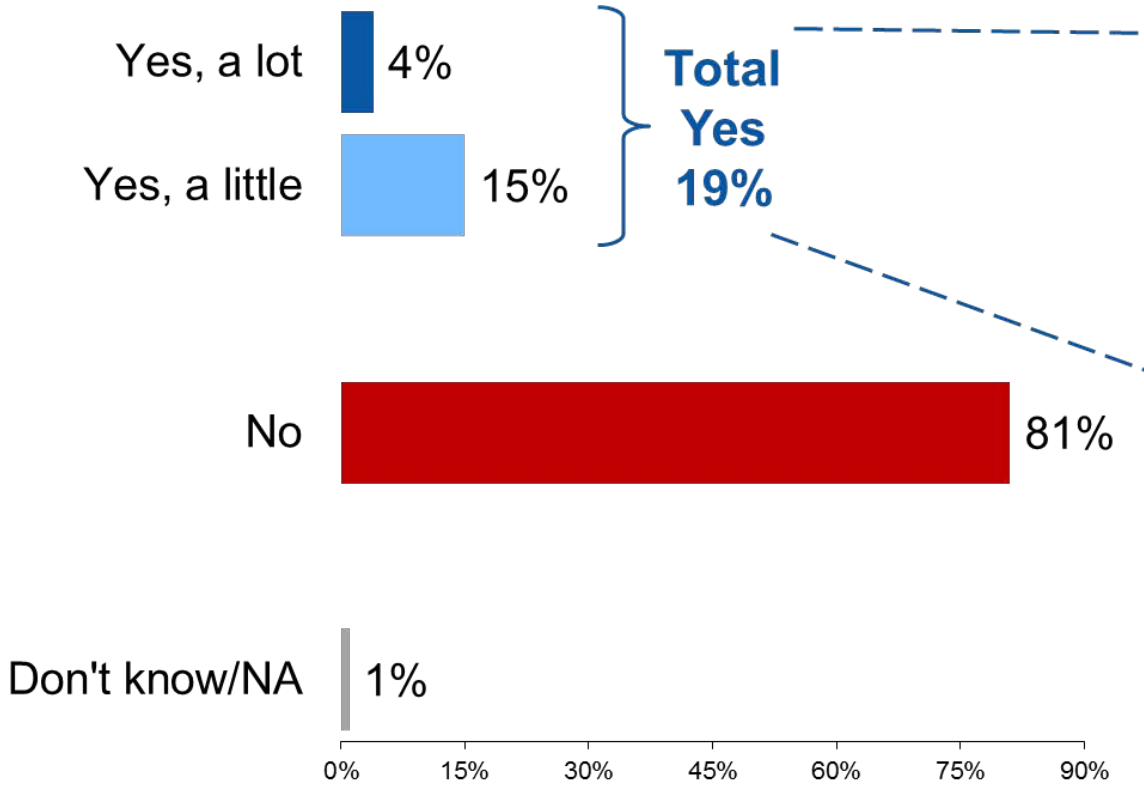
City of Torrance – Business Survey

I'm going to read a few statements that could apply to your business. Please tell me if that statement applies to your business or not.

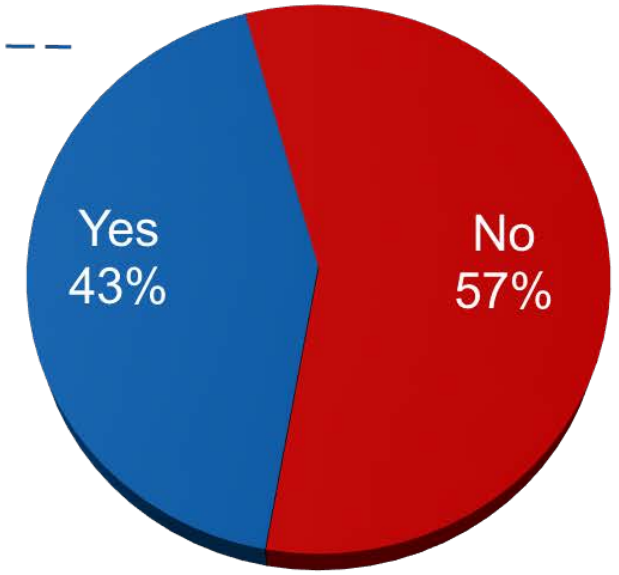


Research identified an opportunity for communication to improve use of services for businesses.

Have you heard, seen or read anything about the One Stop Permit Center in the Torrance City Hall?



Have you used the One Stop Permit Center in the past two years?

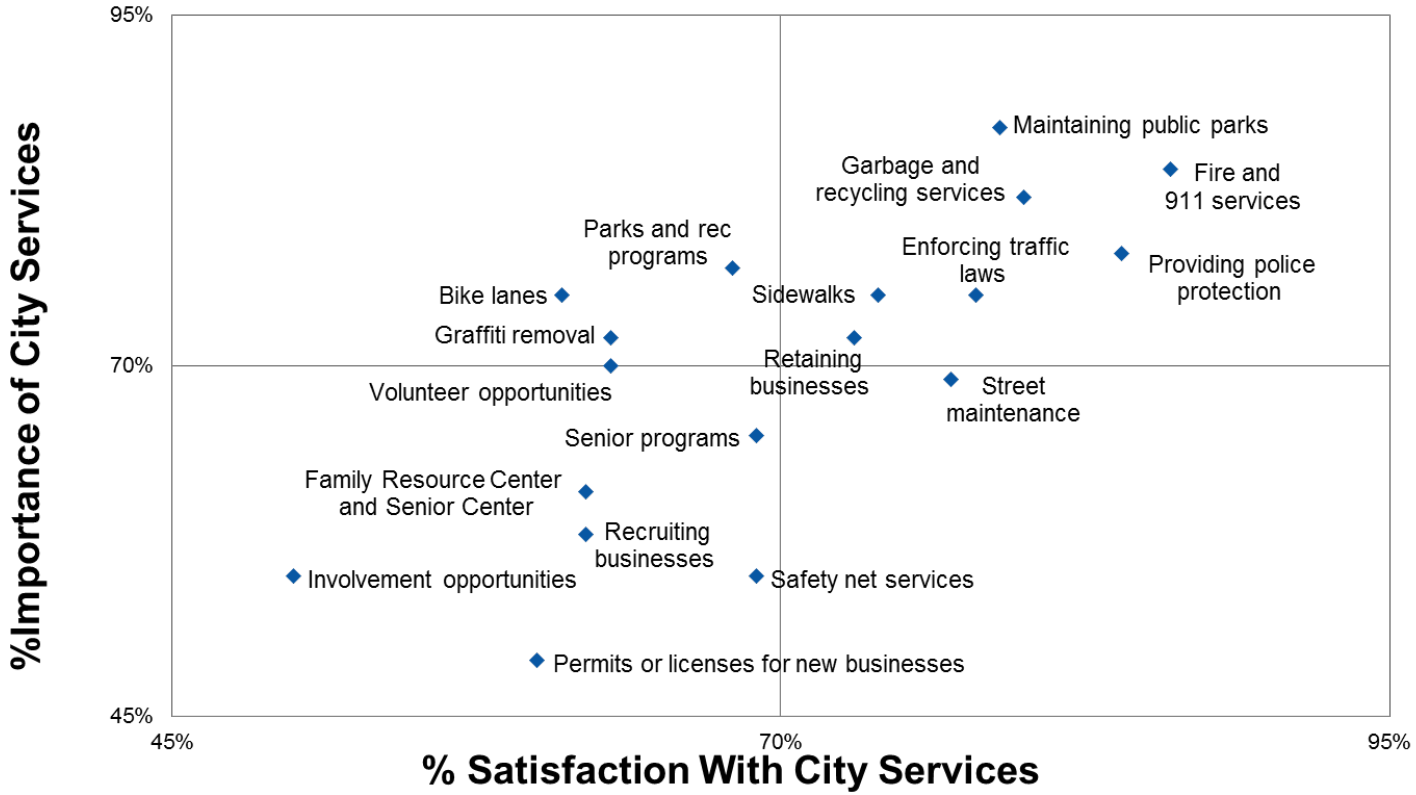


n=56

Q6/7.

Many cities want a snapshot of residents' satisfaction with local services.

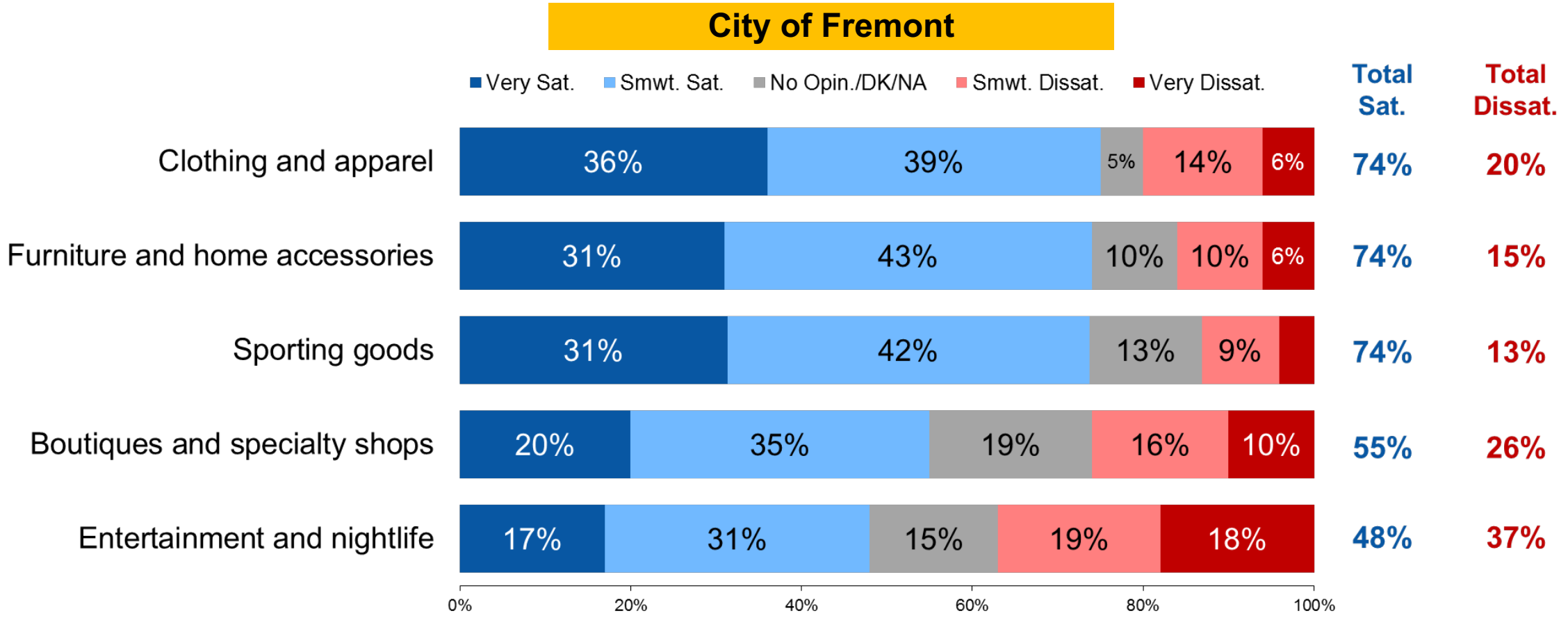
City of Fremont



Q18. Let me ask you about some specific services provided by Fremont's City government. Please tell me how important each service is to making Fremont a good place to live: extremely important, very important, somewhat important, or not too important.

Q19. I am going to read you the same list of services provided by Fremont's City government. This time please tell me how satisfied you are with the job being done by Fremont in providing that service: very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied. Split Sample

Research can also identify satisfaction with very specific issues within a city.

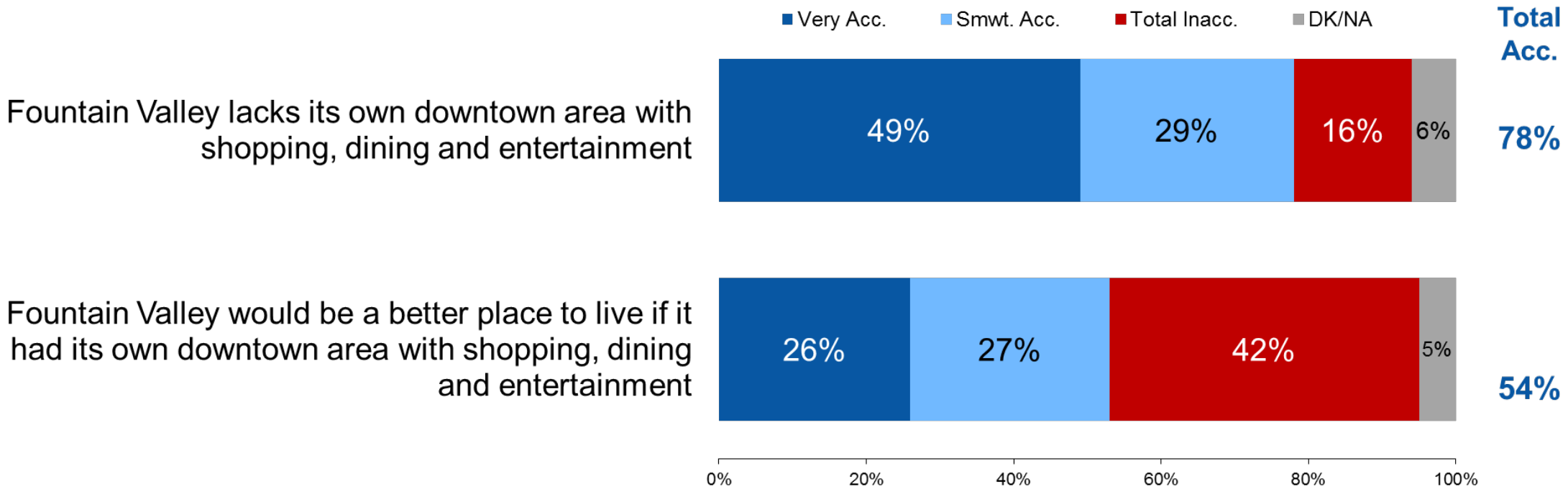


I am going to read you a list of products and services that can be purchased in the City of Fremont. Please tell me how satisfied you are with your ability to purchase that product or service in Fremont: very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied.

Surveys can help illuminate views about specific areas of a city, such as a downtown.

City of Fountain Valley

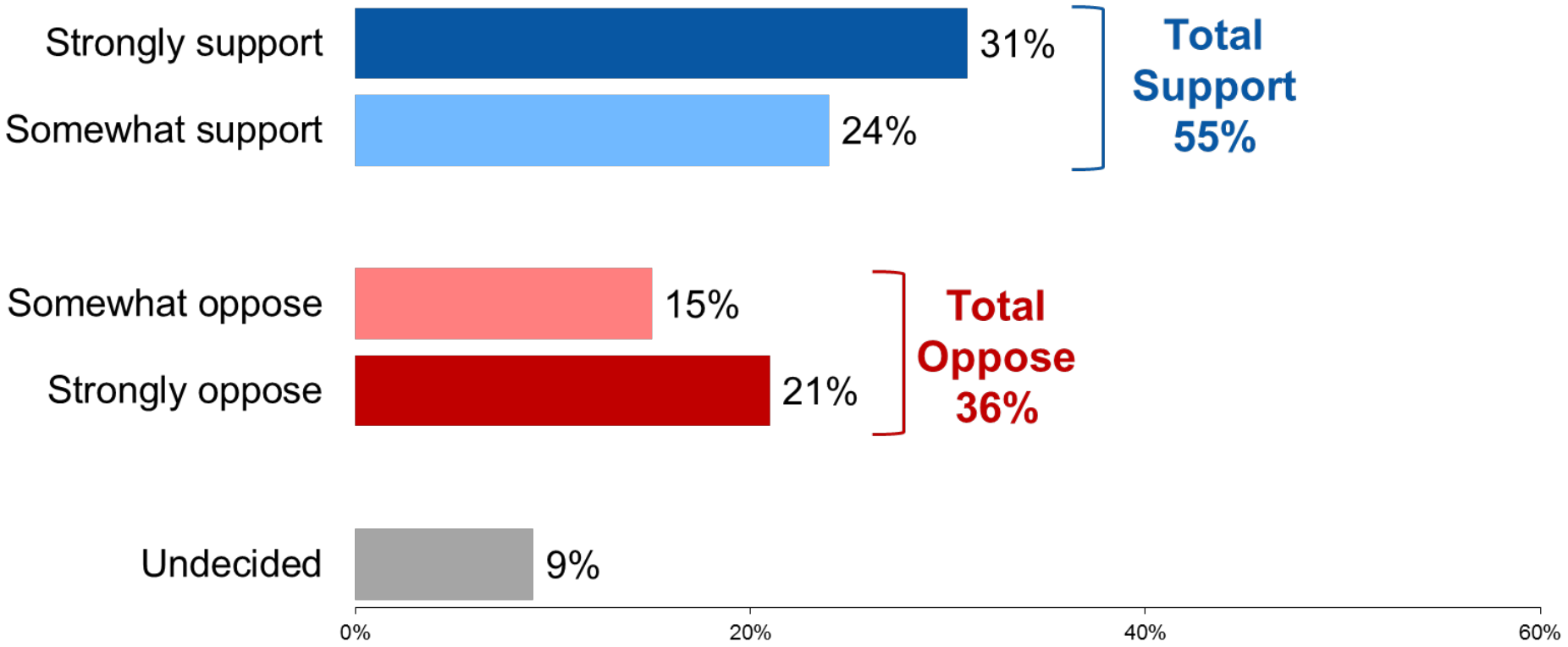
I would like to read you a series of statements that people have made about the City of Fountain Valley. Please tell me if you believe it is accurate or inaccurate.



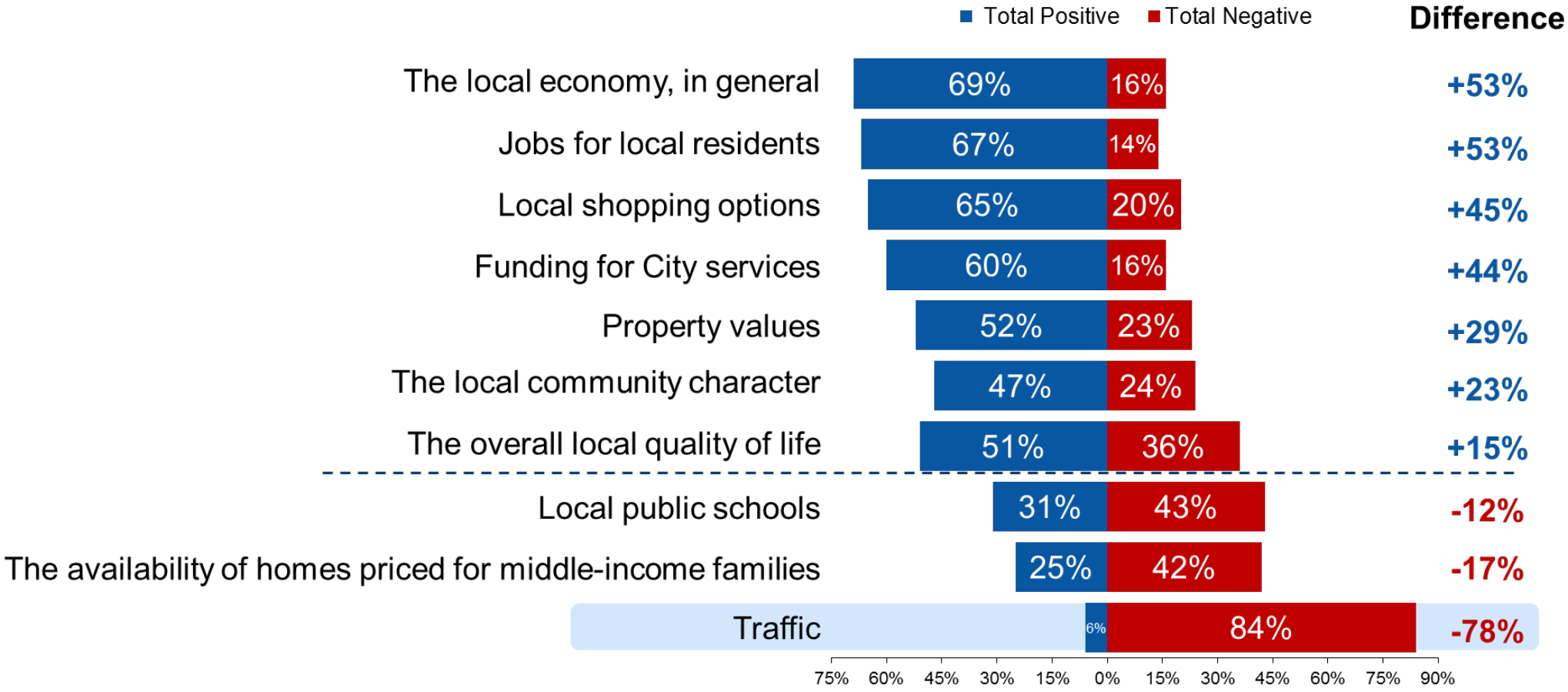
Case Study on Research for Business Owners

For a real estate development project, an early test of a description of the project gives a good understanding of how the community will react to your plans.

Based on the description you just heard, do you support or oppose this proposed redevelopment project?

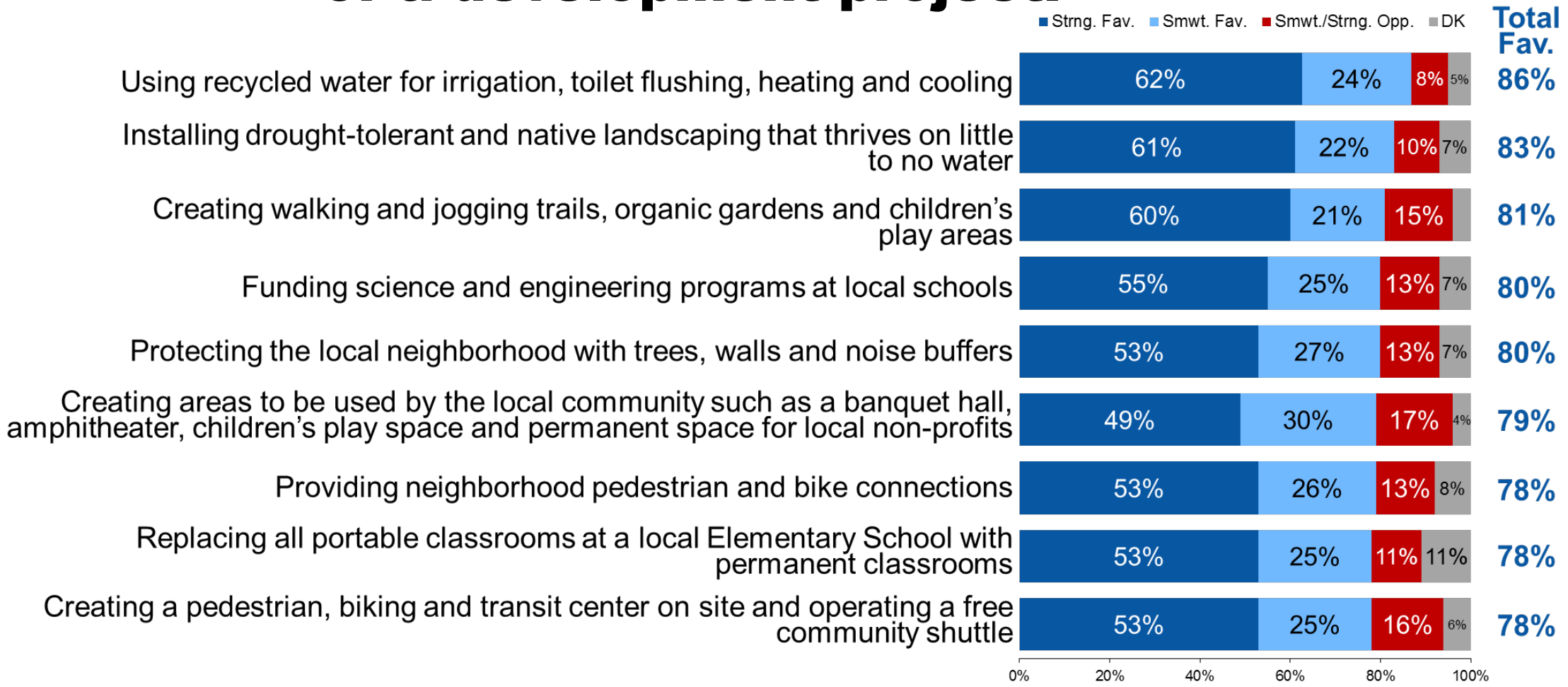


To get more context, one can ask if residents think the project will have positive or negative impacts.



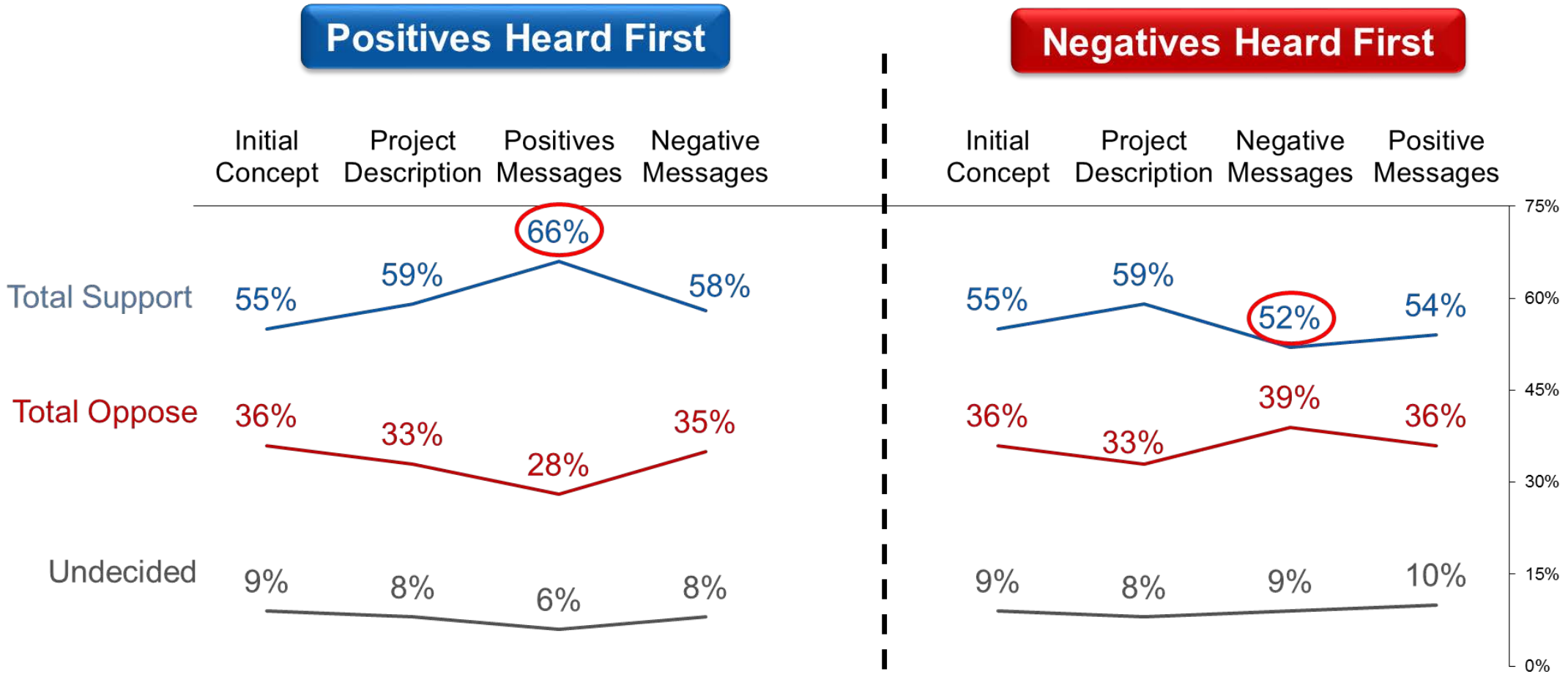
I am going to read you a list of specific aspects of life for residents. Please tell me whether you think the project I just described would have a positive impact, no impact, or a negative impact on that aspect of life for residents. Split Sample

Research can identify the relative favorability of elements of a development project.



There are many elements of the redevelopment and community benefits plan funded by the property owner. I am going to read you some of them and after each one, please tell me if you favor or oppose that element of the plan.
Split Sample

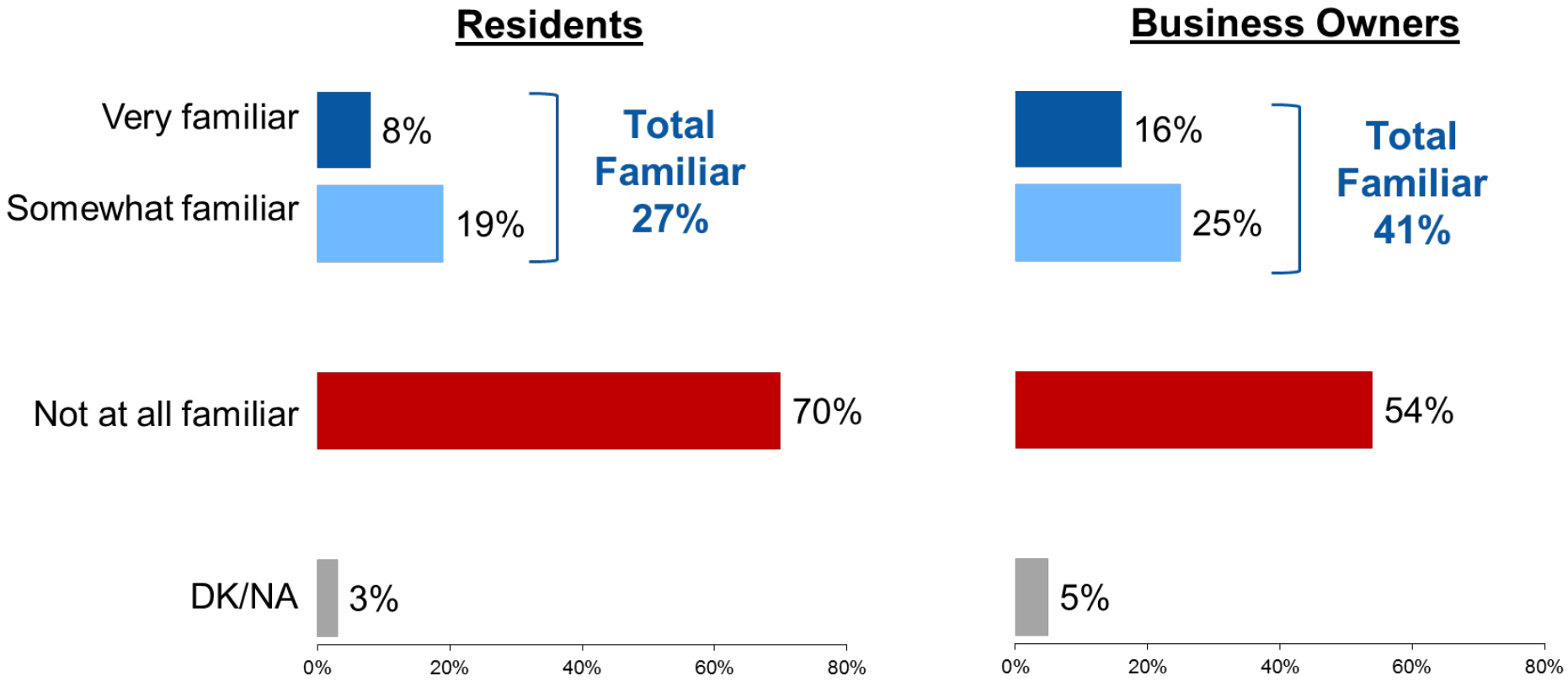
Communications can be extremely important in shaping support for a development projects.



Words matter.

City of Bellflower

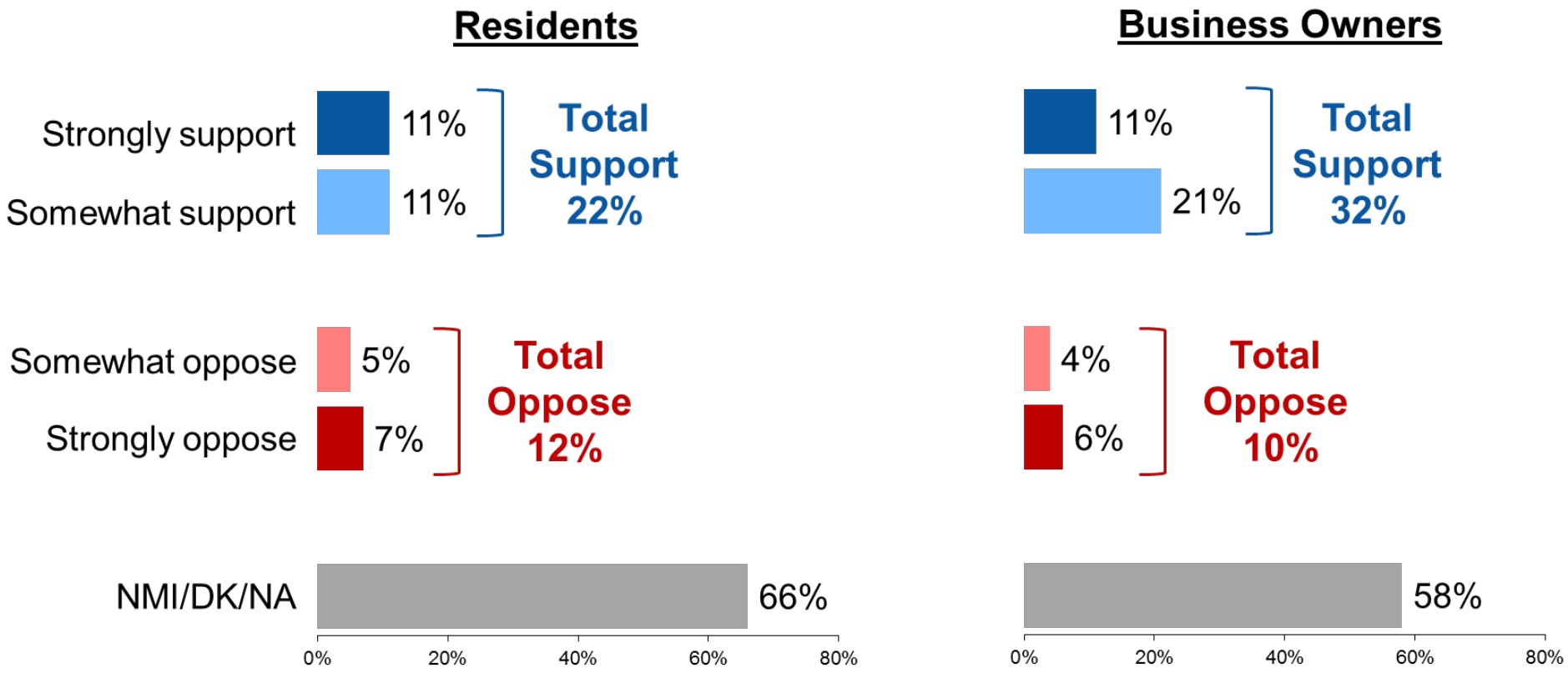
Awareness of term "Mixed-Use Development"



19. I would like to ask you how familiar are you with the term mixed-use development? Would you say that you are very familiar, somewhat familiar or not at all familiar with this term?

Opinion of Mixed-Use Development Before Information

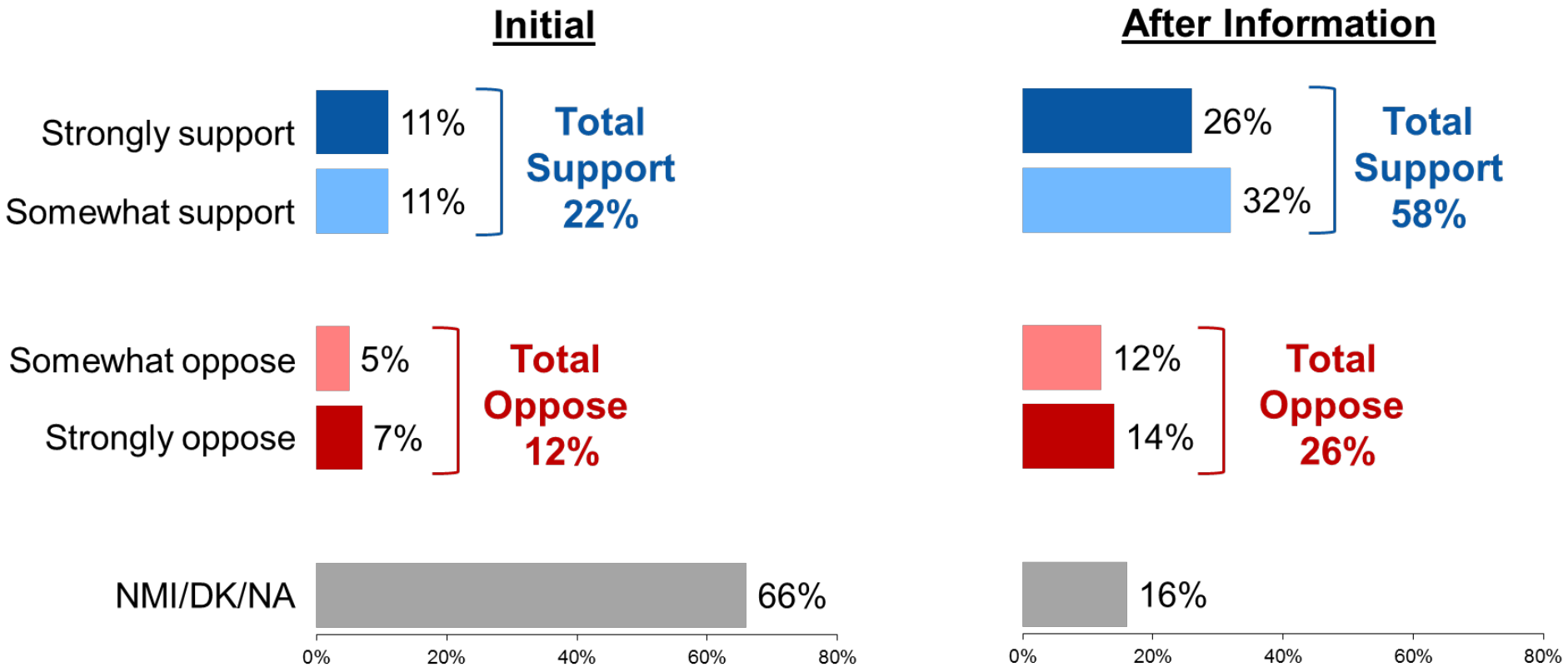
City of Bellflower



20. Based on what you know about mixed-use development or just my mentioning it, would you favor or oppose further mixed-use development in Bellflower?

Residents' reaction to information about mixed-use development shows the impact of information.

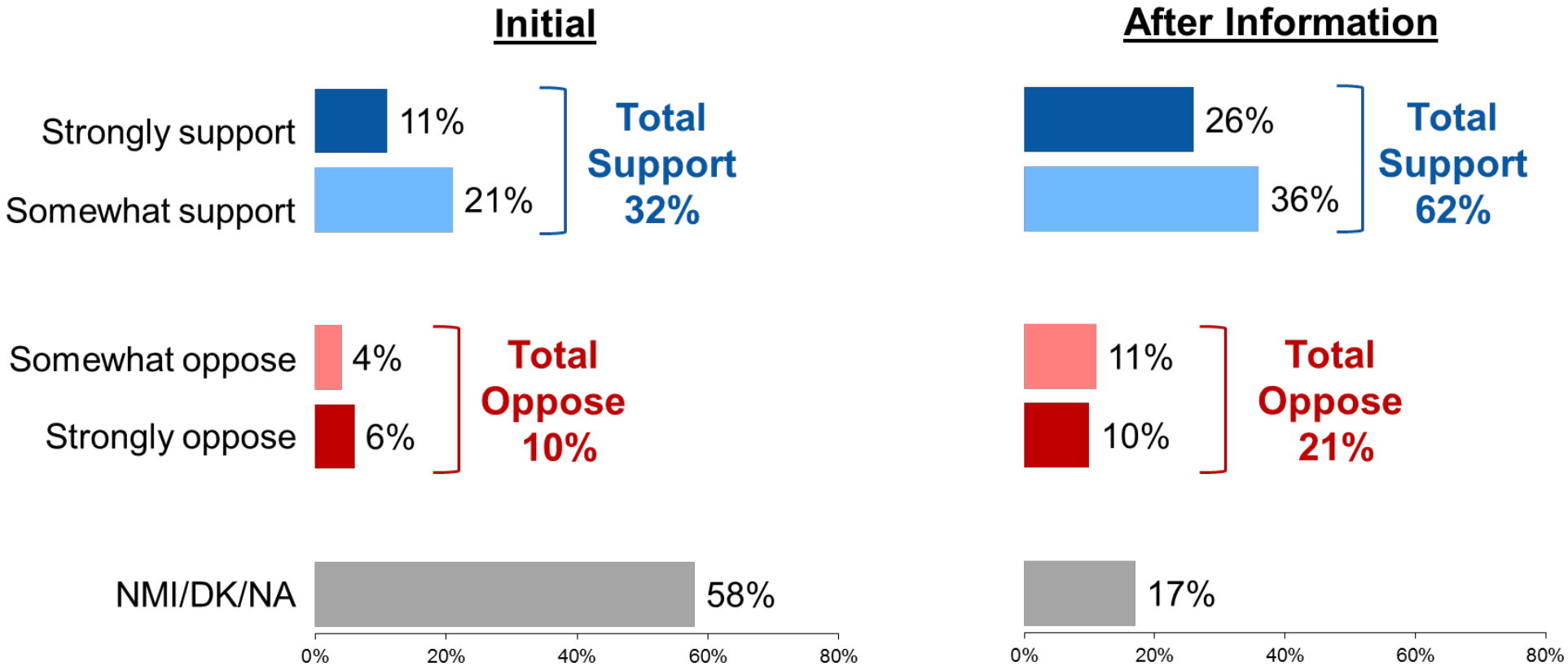
City of Bellflower - Residents



20. Based on what you know about mixed-use development or just my mentioning it, would you favor or oppose further mixed-use development in Bellflower?

The views of business owners also changed substantially with information.

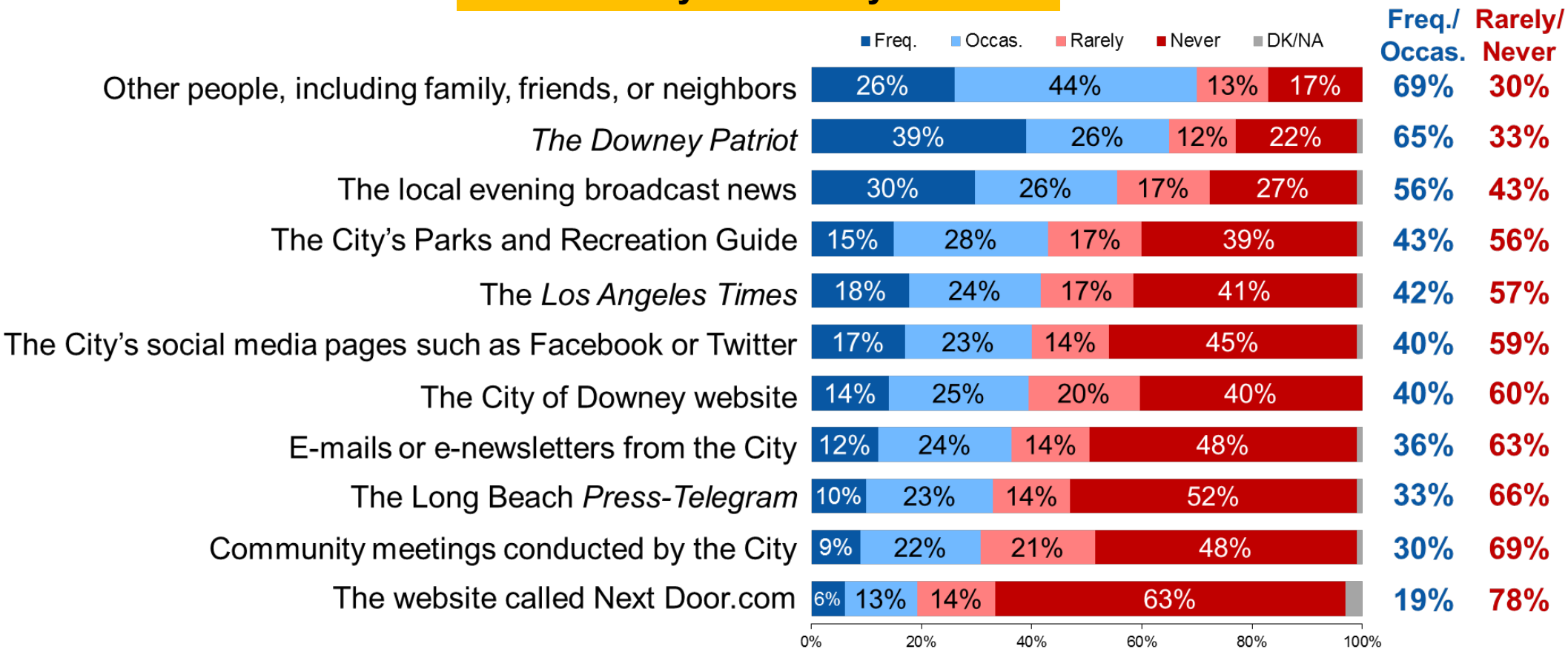
City of Bellflower – Business Owners



21. Now that you have heard more about the term mixed-use development, would you favor or oppose further mixed-use development in Bellflower?

Understanding where residents get their local information helps to make communication campaigns effective..

City of Downey



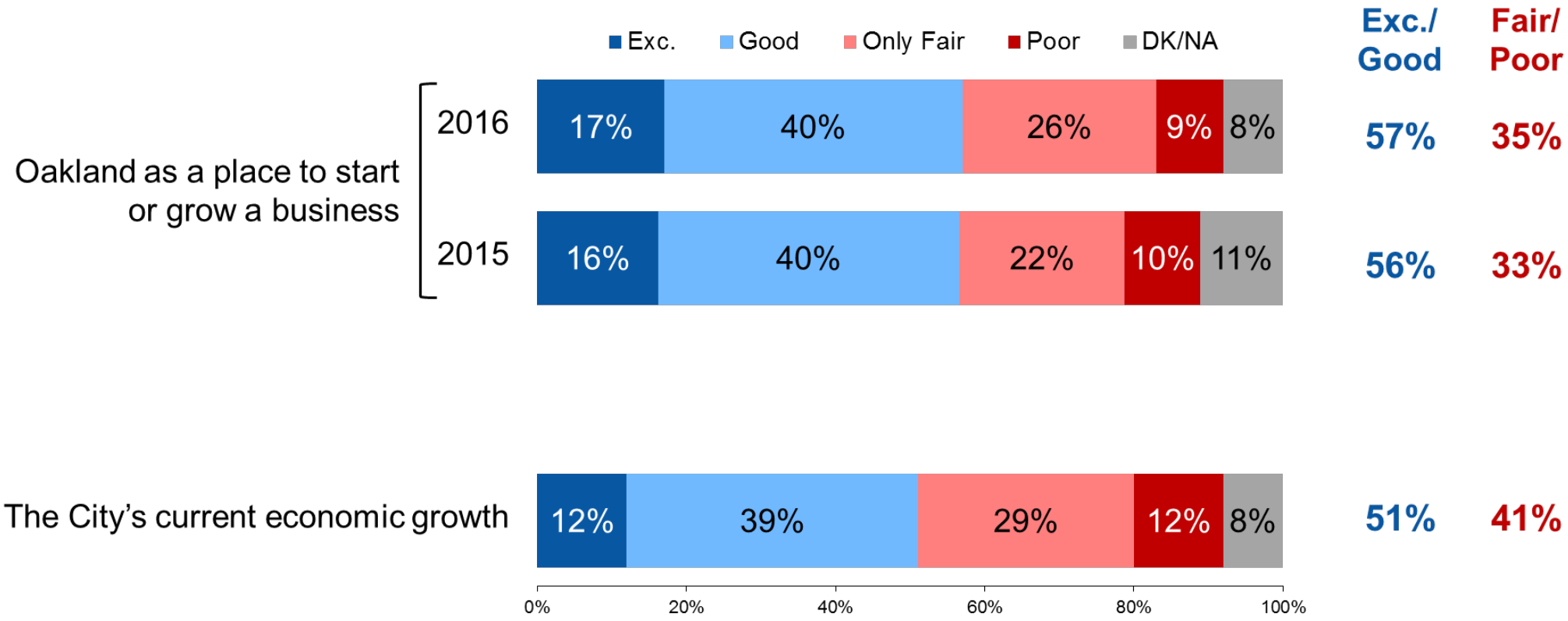
Q14. I'm going to read you a list of sources from which people get information about the City of Downey's programs, events and issues. I'd like you to tell me how often you use it to get information about such issues.

Case Study on Research for Organizations

Organizations can use research to test residents' opinions of the priorities of the organization and its members.

Oakland Chamber of Commerce

Using a scale of excellent, good, only fair, or poor, how would you rate …?

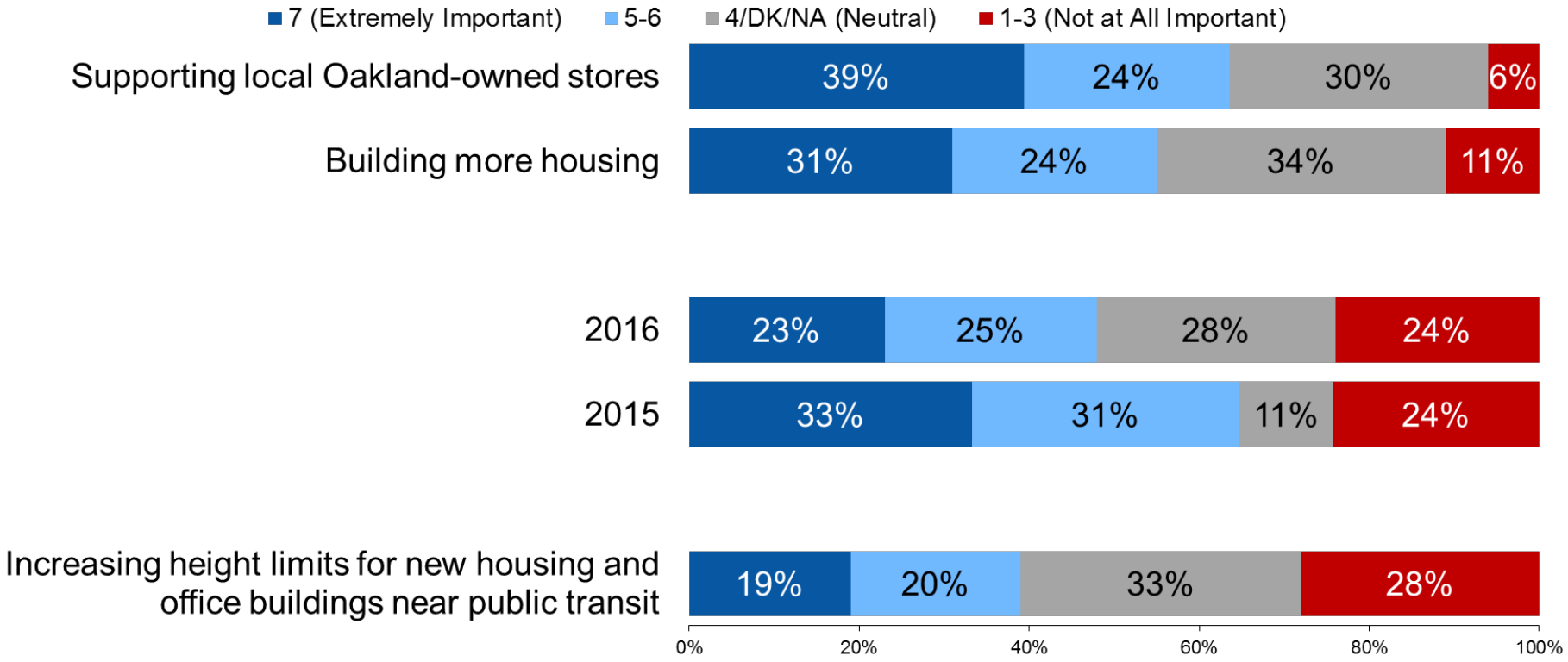


Q23b/c.

Research can help identify residents' economic and social priorities.

Oakland Chamber of Commerce

I am going to read a list of issues in Oakland. Please tell me how important each issue should be in Oakland right now, on a scale of 1 to 7, where 1 is not at all important and 7 is extremely important.

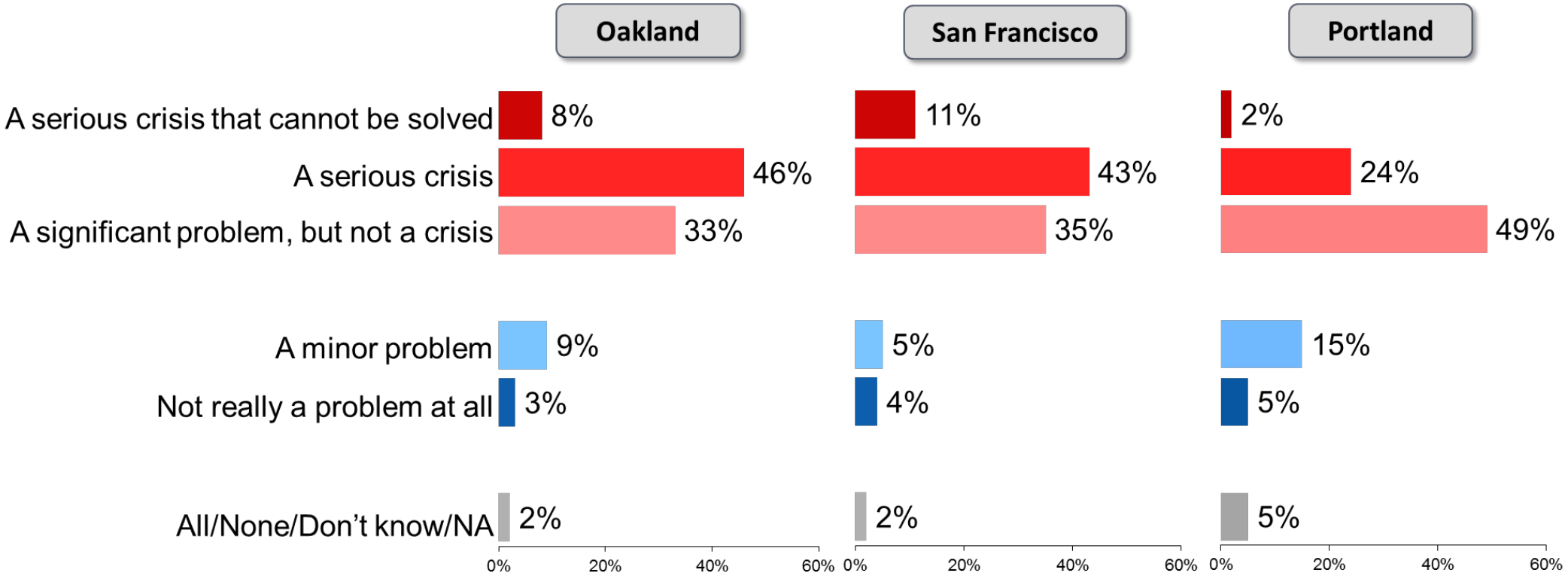


Q28.

Research can help one understand perceptions of your city relative to other ones.

Oakland Chamber of Commerce

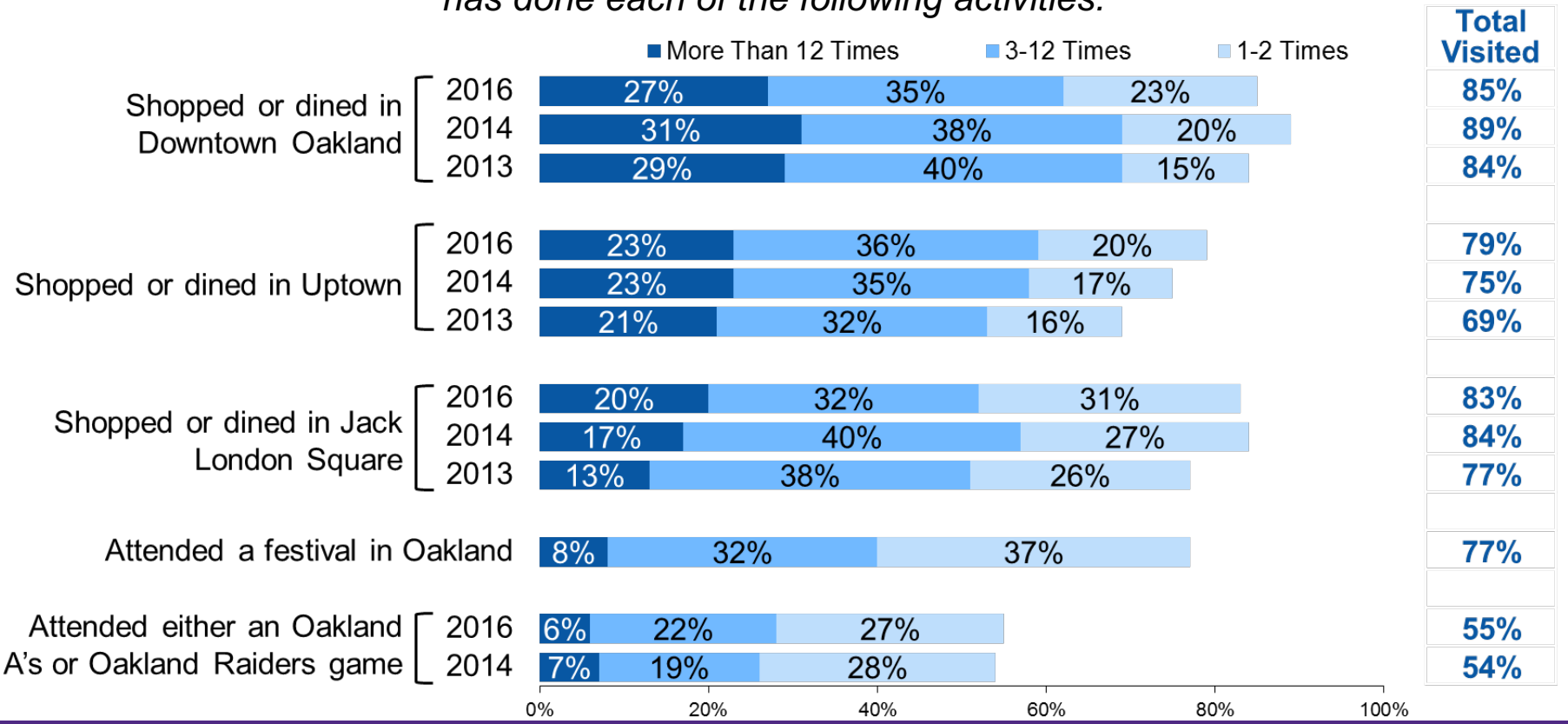
Which of the following would you say best describes the cost and availability of housing in _____?



Surveys can also help inform shifting priorities to maintain or improve use of local business areas.

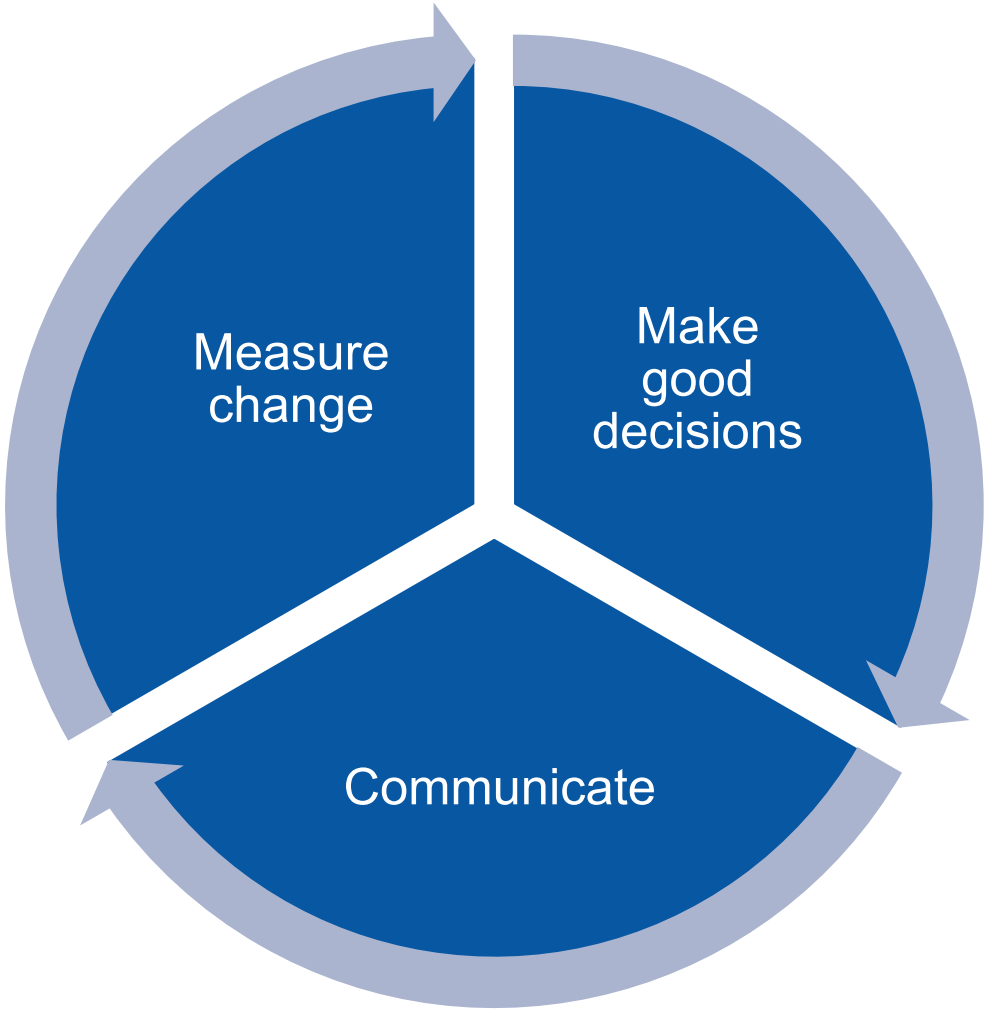
Oakland Chamber of Commerce

In the last twelve months, about how many times do you think you or another household member has done each of the following activities.



Q33.

Benefits of Public Opinion Research



Benefits of Public Opinion Research

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March 15, 2017

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PUBLIC OPINION RESEARCH & STRATEGY

DLBA User/Residential Intercept Survey

2016

sga
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DOWNTOWN LONG BEACH ALLIANCE

#WCUDF17

Presentation

1. Downtown User Survey
2. Residential Consumer Preference Survey
3. Future Demographic Trends to Consider

User Survey

Surveys completed	322
Demographics	Age, Gender, Income
Classifications	Residents, Workers, Visitors, Tourists
Economic Activity	Retail, Restaurants, Services, Entertainment
Feelings about DTLB	Net Promoter Score, Preference for other areas

Pine/1st St

East Village

Ocean Blvd West

Courthouse

Pine/Broadway

Promenade/Broadway

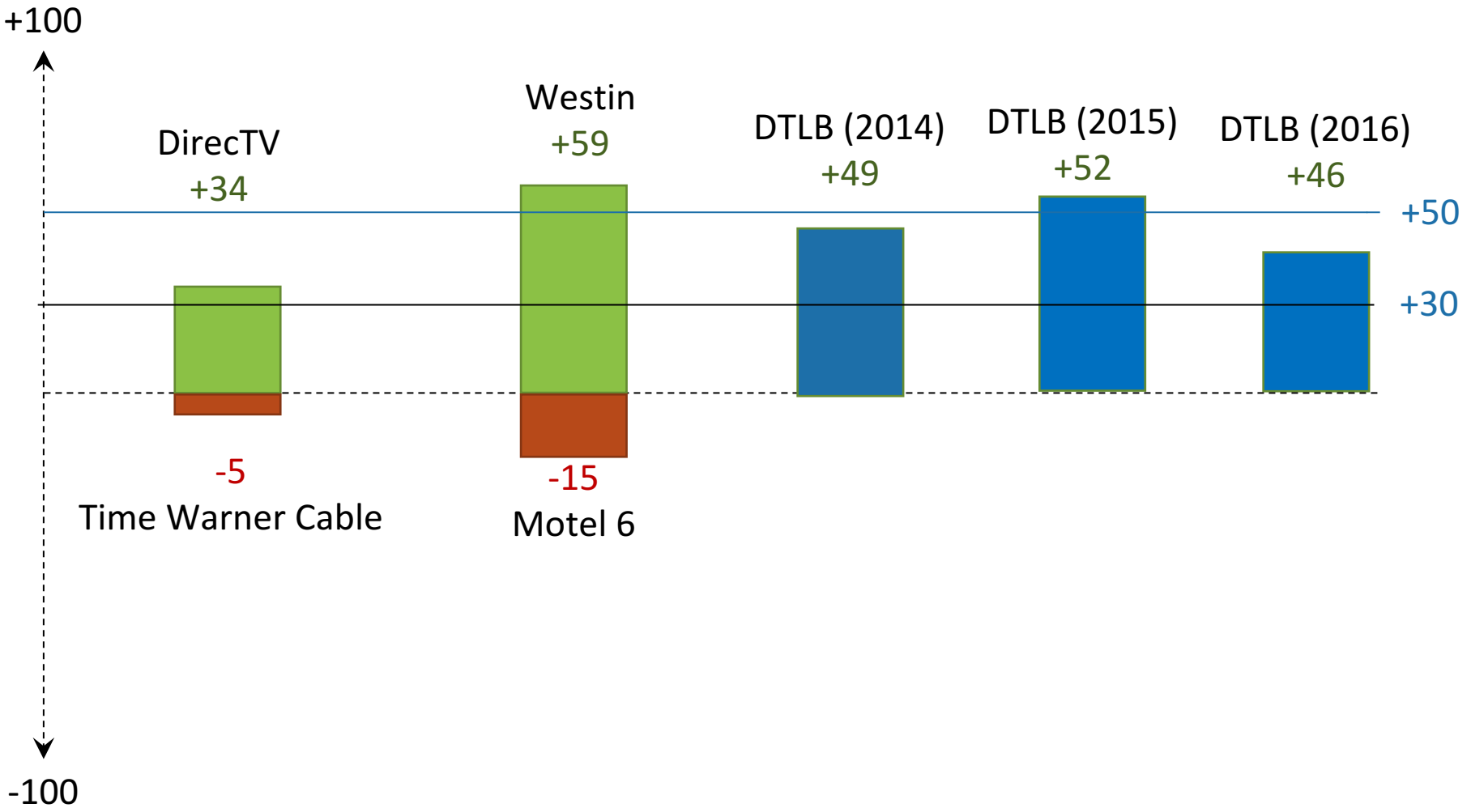
The Pike

Waterfront/Aquarium

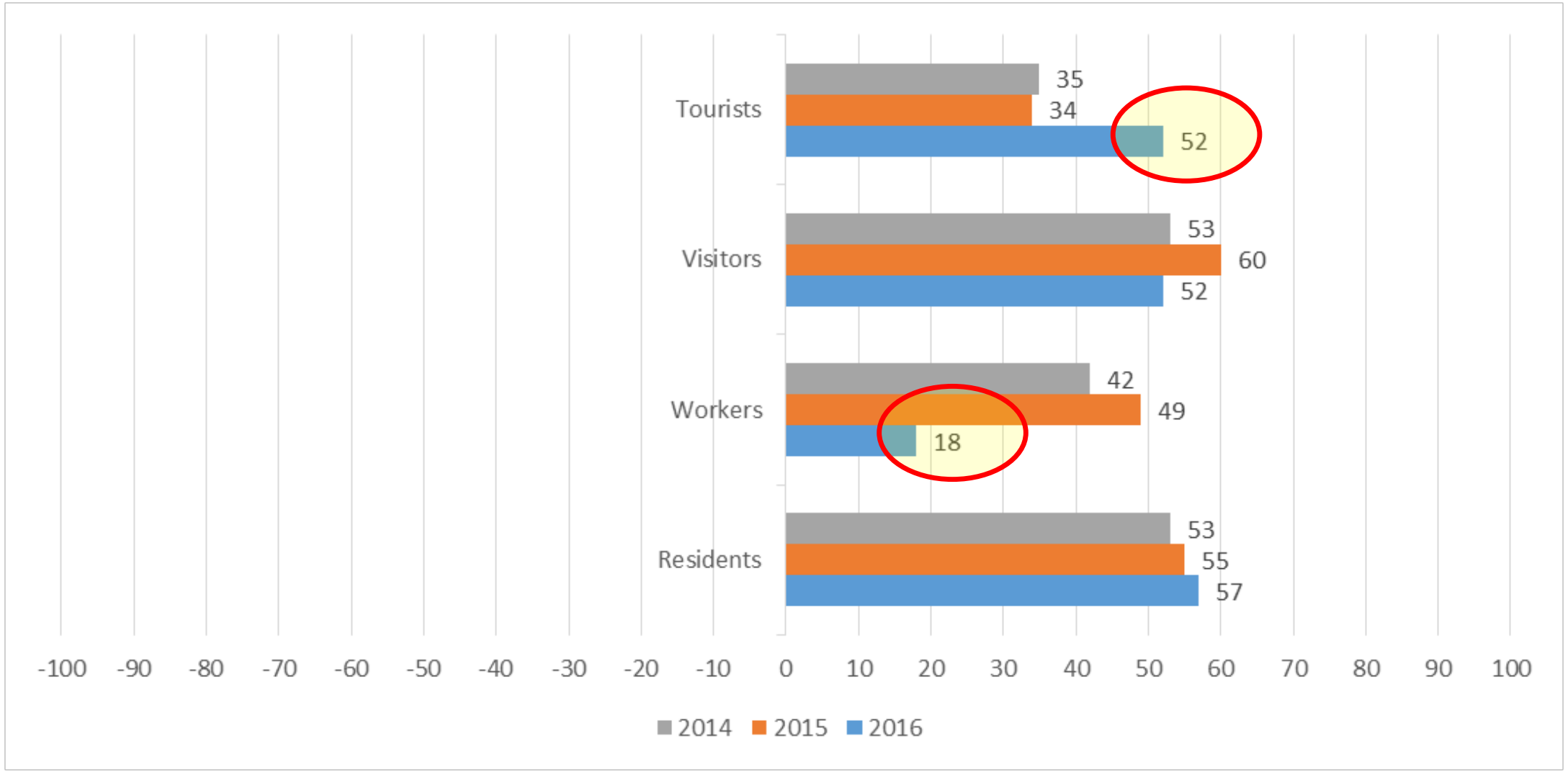
~~Convention Center~~

~~Pine/6th St~~

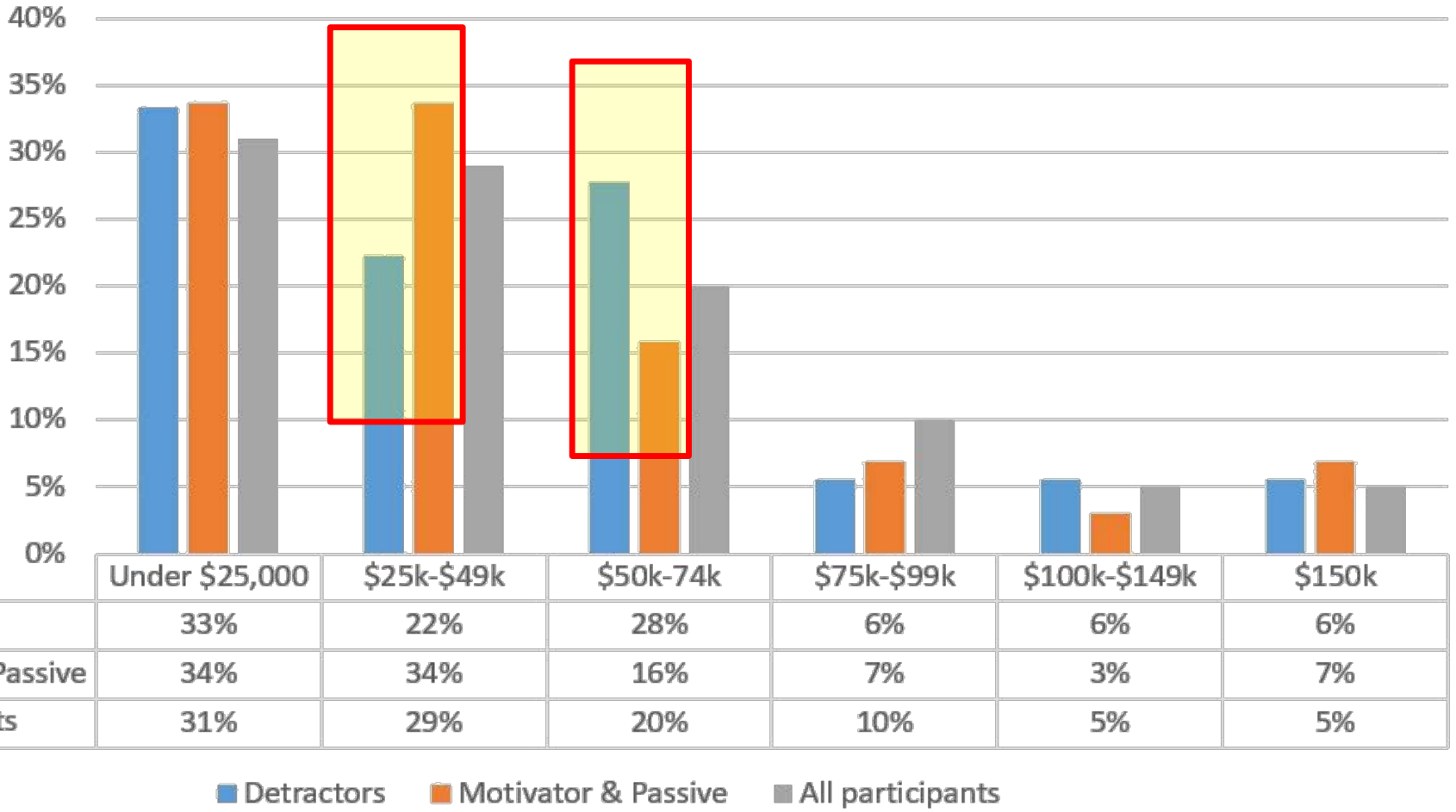
Net Promoter Score



Net Promoter Score

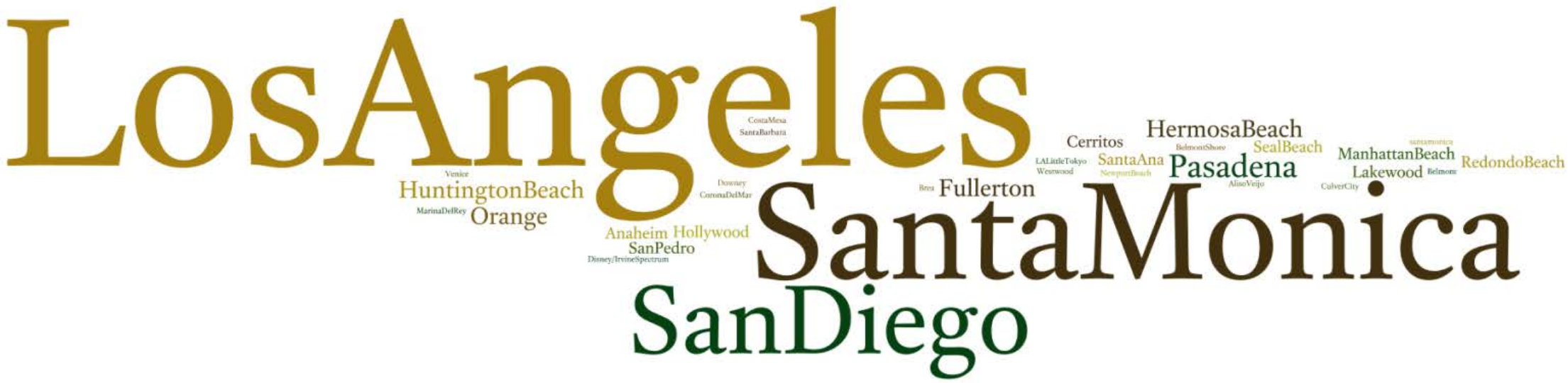


Income Distribution

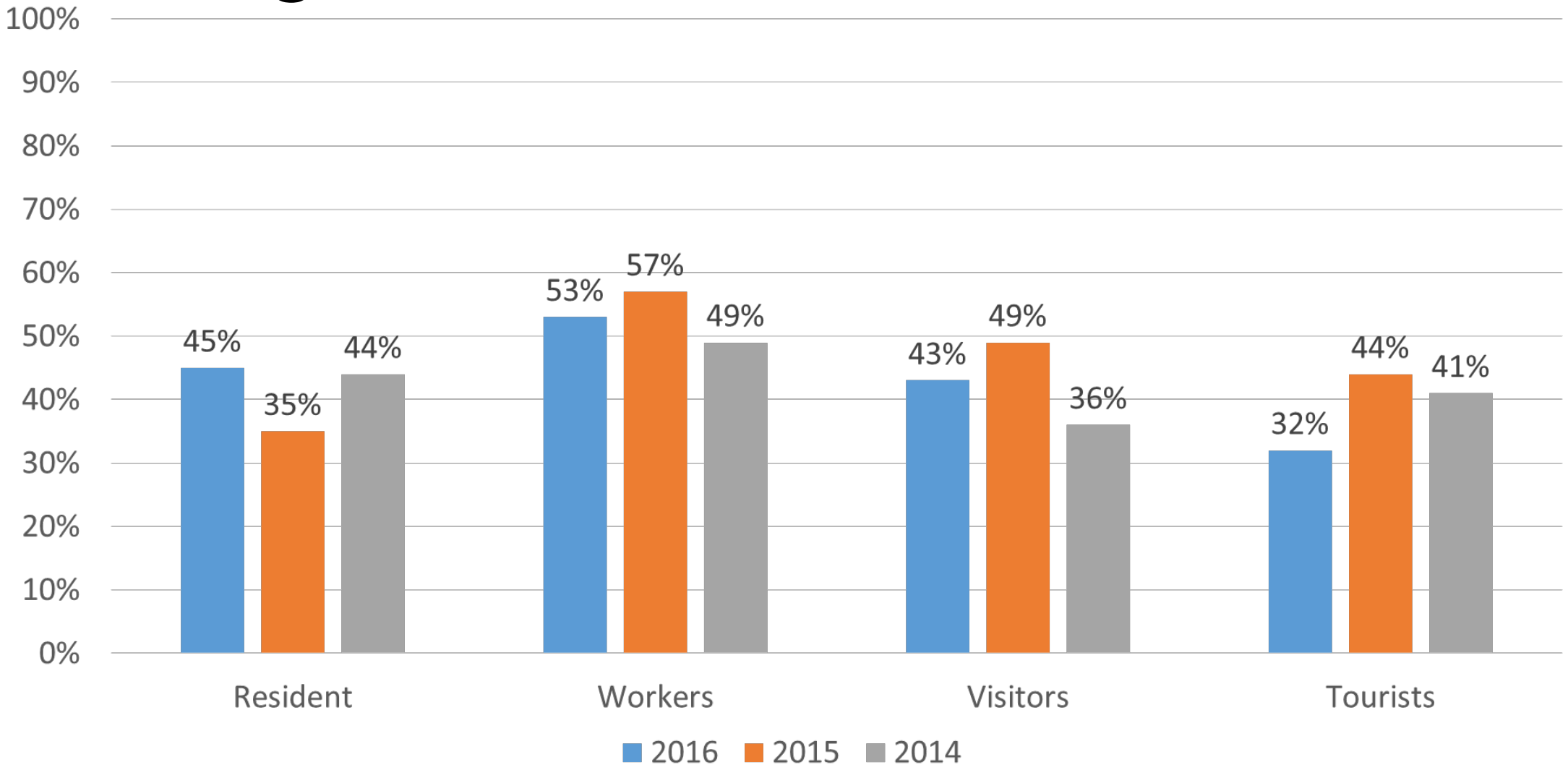


	Under $25,000	$25k-$49k	$50k-74k	$75k-$99k	$100k-$149k	$150k
Detractors	33%	22%	28%	6%	6%	6%
Motivator & Passive	34%	34%	16%	7%	3%	7%
All participants	31%	29%	20%	10%	5%	5%

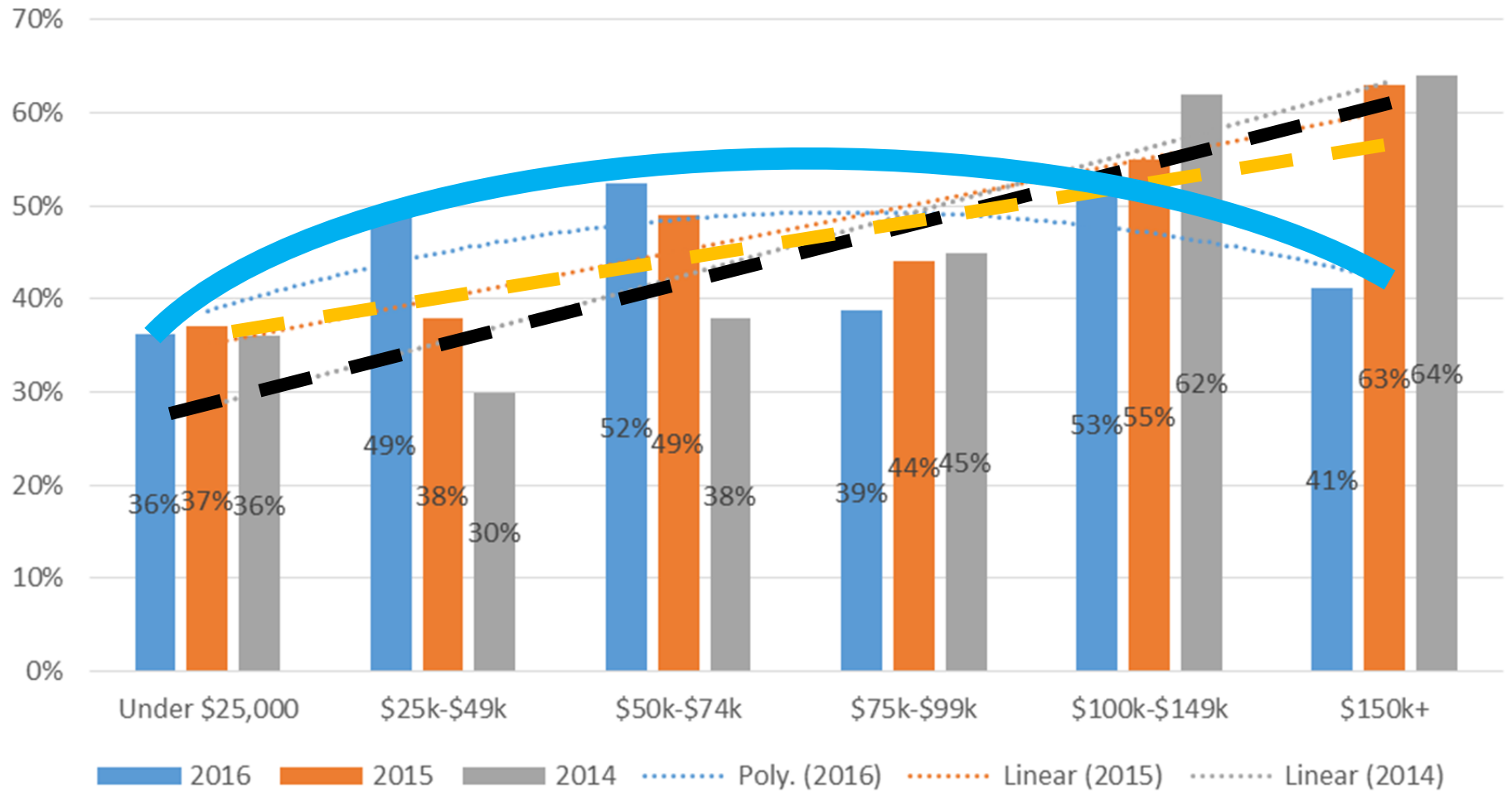
Preference


LosAngeles
SantaMonica
SanDiego
HuntingtonBeach
Orange
Anaheim
Hollywood
SanPedro
Fullerton
Pasadena
HermosaBeach
Cerritos
SantaAna
SealBeach
ManhattanBeach
Lakewood
RedondoBeach
CostaMesa
SantaBarbara
Venice
MarinaDelRey
Downey
CoronaDelMar
Brea
LALittleTokyo
Westwood
BelmontShore
NewportBeach
AlisoViejo
CulverCity
Belmont
Disney/IrvineSpectrum

Preferring Alternative Hub



Preference


70%
60%
50%
40%
30%
20%
10%
0%
36%
37%
36%
49%
38%
30%
52%
49%
38%
39%
44%
45%
53%
55%
62%
41%
63%
64%
Under $25,000
$25k-$49k
$50k-$74k
$75k-$99k
$100k-$149k
$150k+
2016
2015
2014
Poly. (2016)
Linear (2015)
Linear (2014)

Average Spending: 2014 ~ 2016

Category	Average Spend (2014)
Retail	$23.82
Service	$7.15
Restaurant	$20.35
Entertainment	$6.88

Average Spending: 2014 ~ 2016

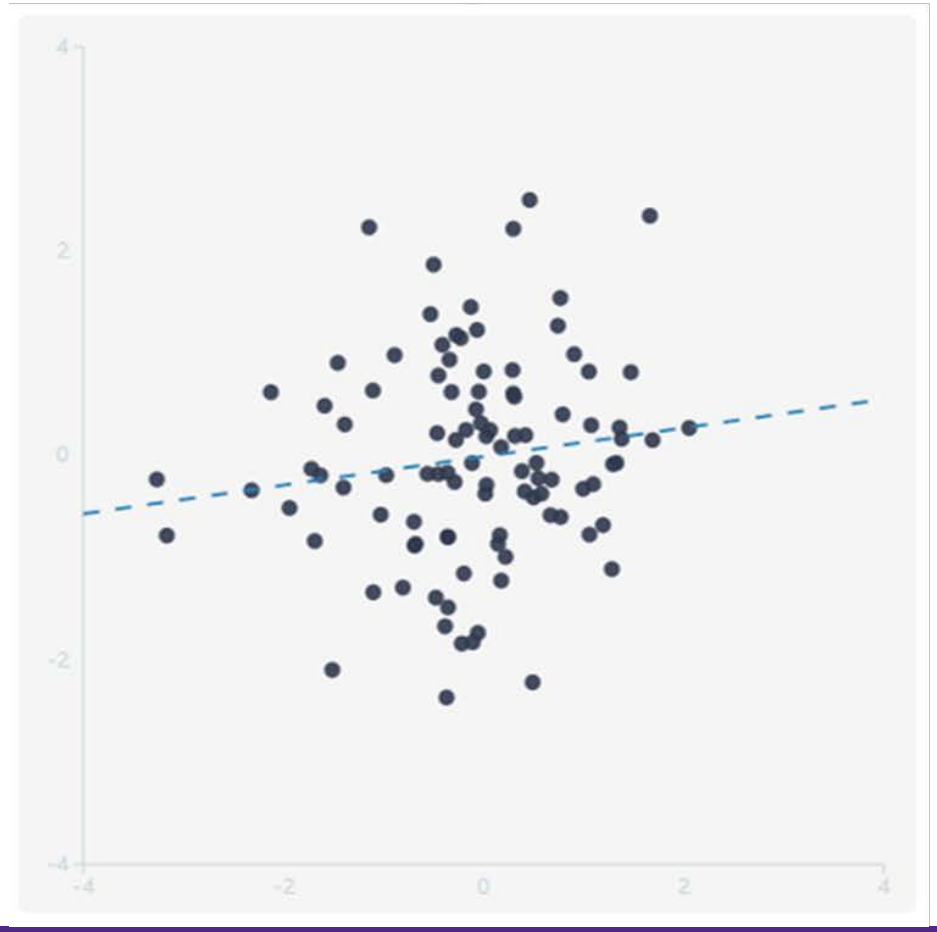
Category	Average Spend (2015)	Average Spend (2014)
Retail	$32.49	$23.82
Service	$23.45	$7.15
Restaurant	$17.78	$20.35
Entertainment	$15.44	$6.88

Average Spending: 2014 ~ 2016

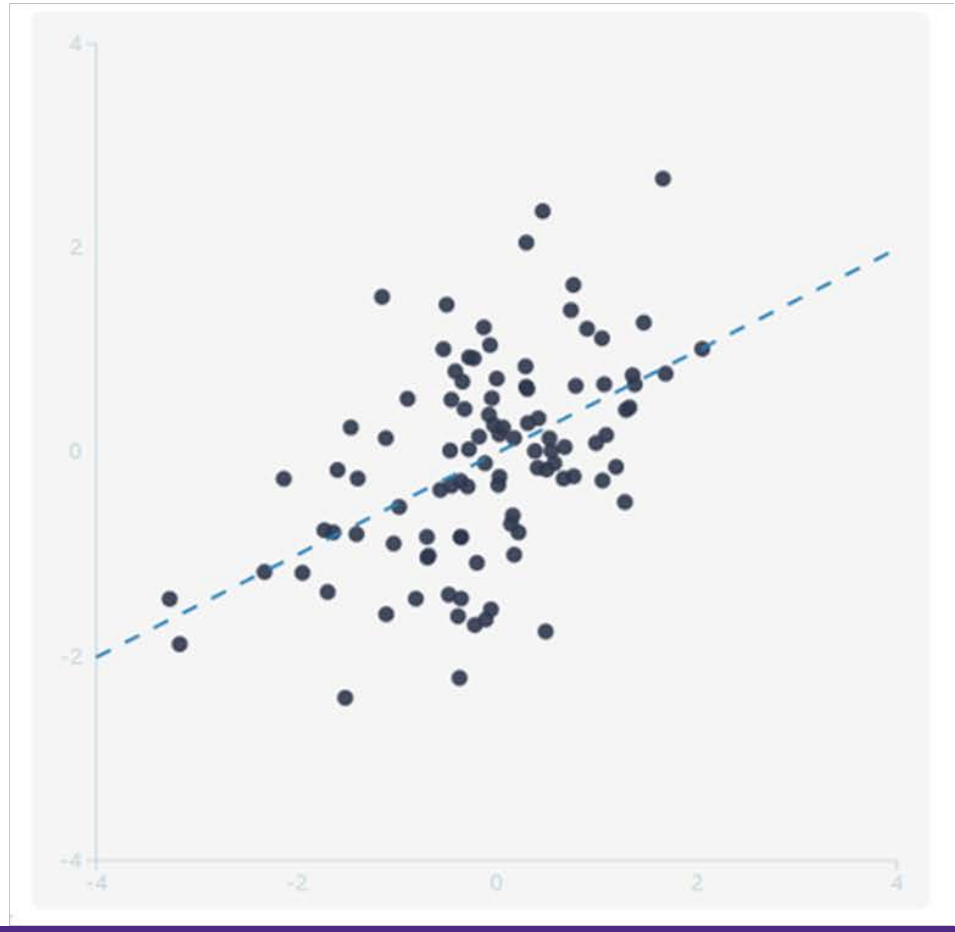
Category	Average Spend (2016)	Average Spend (2015)	Average Spend (2014)
Retail	$30.67	$32.49	$23.82
Service	$25.23	$23.45	$7.15
Restaurant	$19.35	$17.78	$20.35
Entertainment	$33.63	$15.44	$6.88

Correlation: NP Score v. Spend

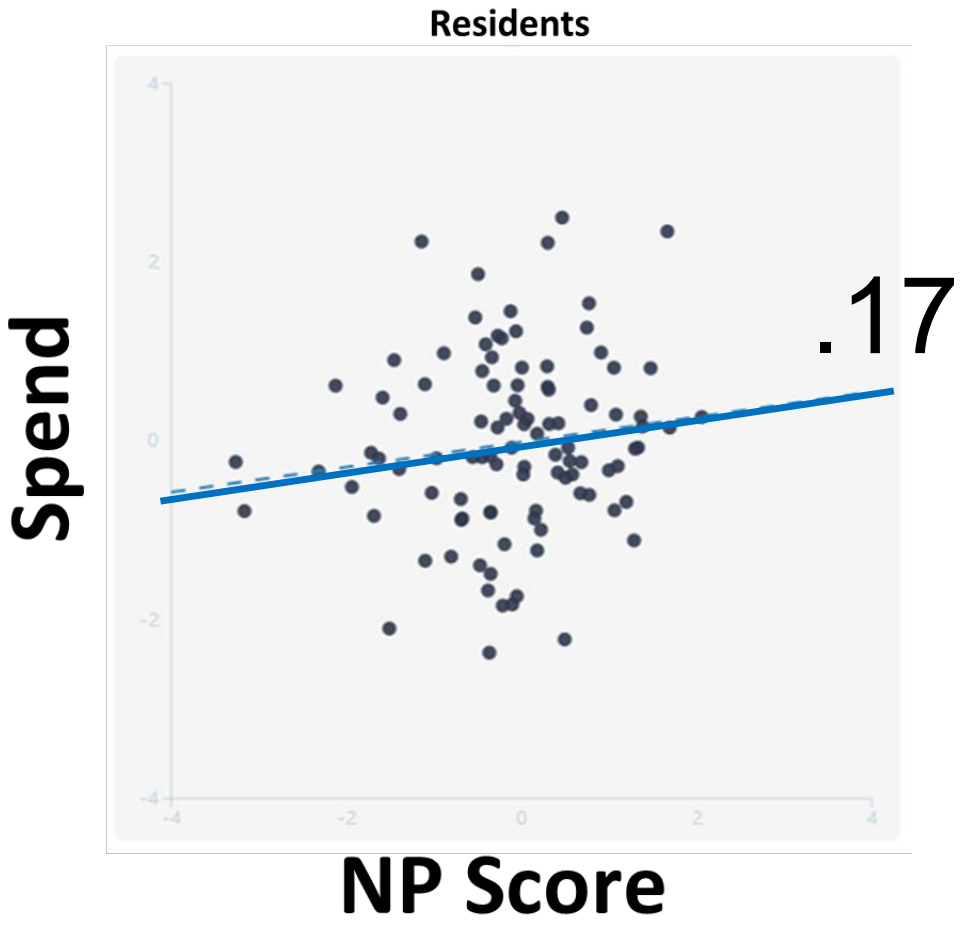
Residents



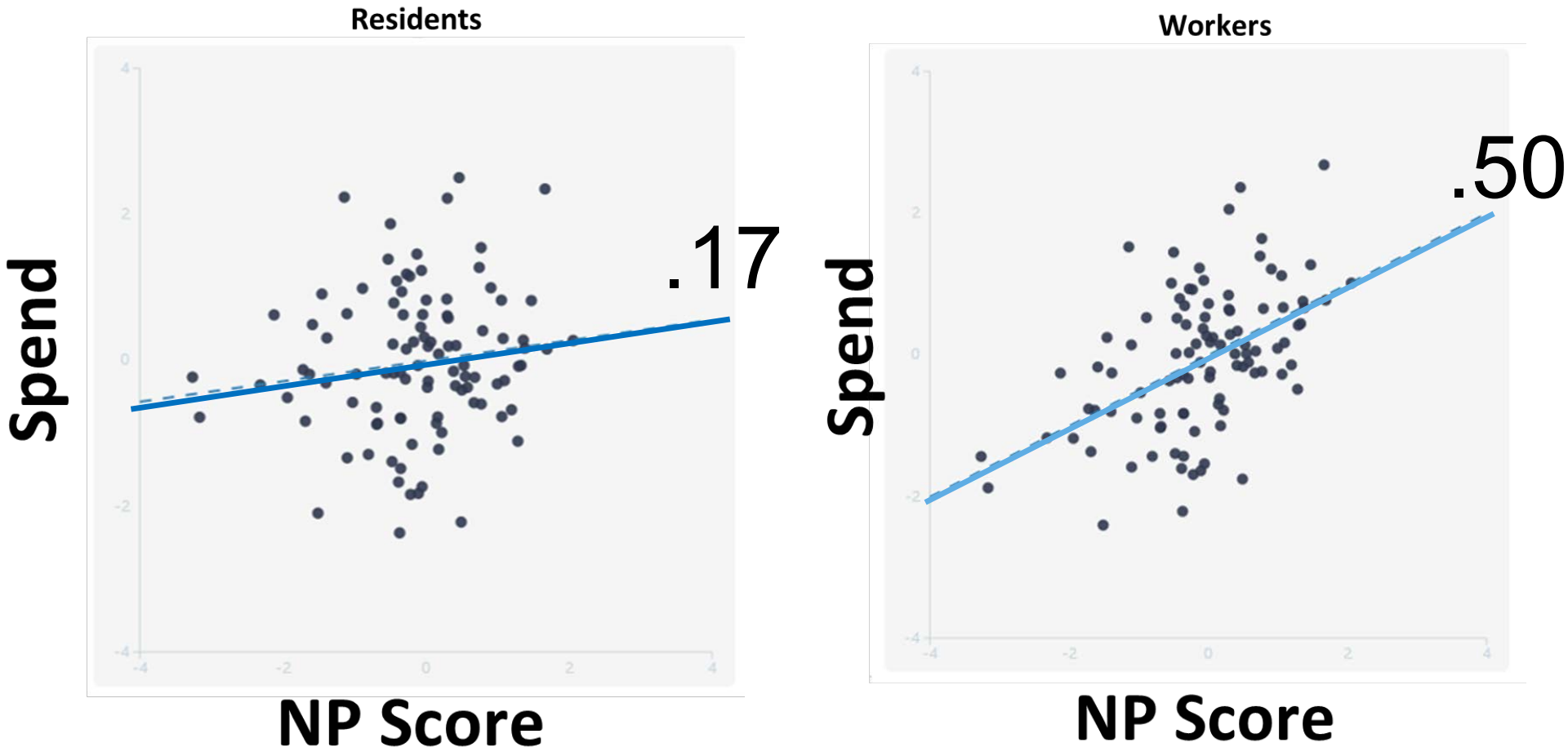
Workers



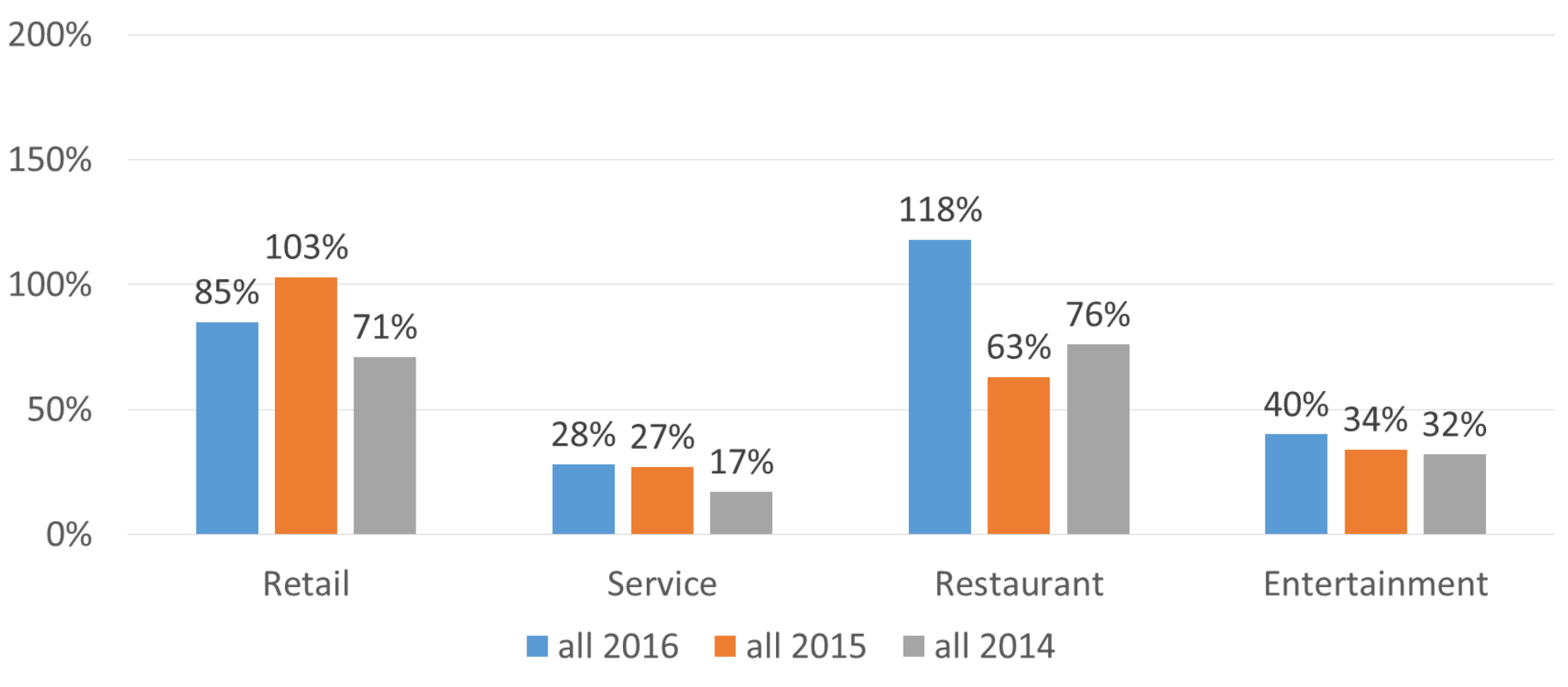
Correlation: NP Score v. Visit Store/Spend



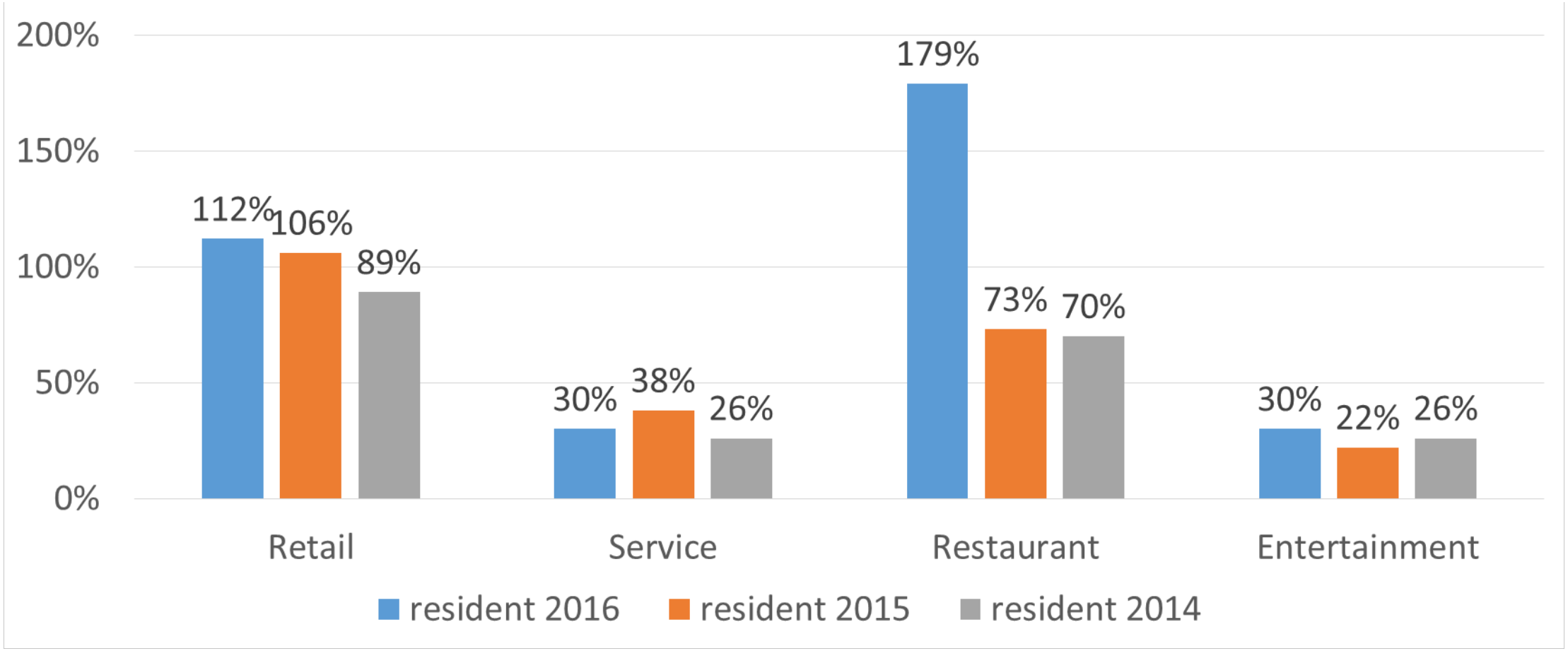
Correlation: NP Score v. Visit Store/Spend



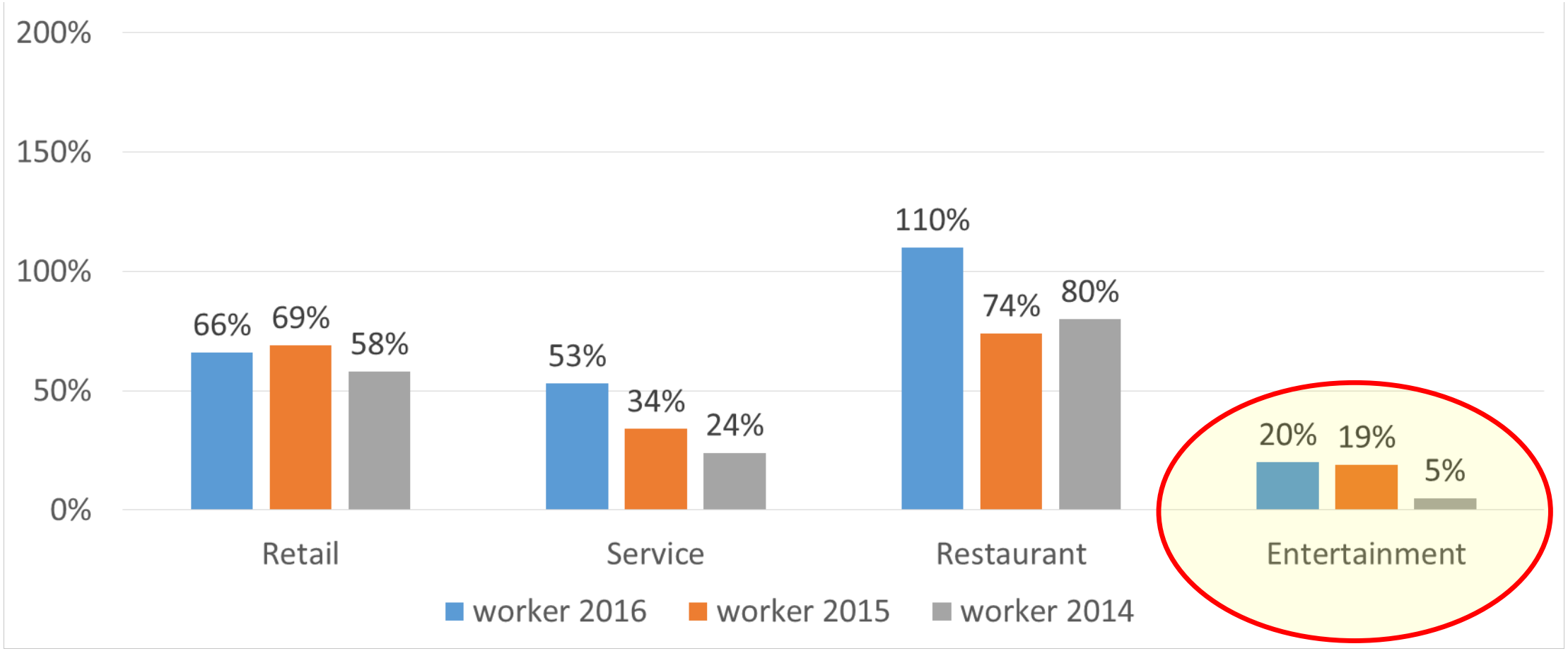
Likelihood of Visit: Overall



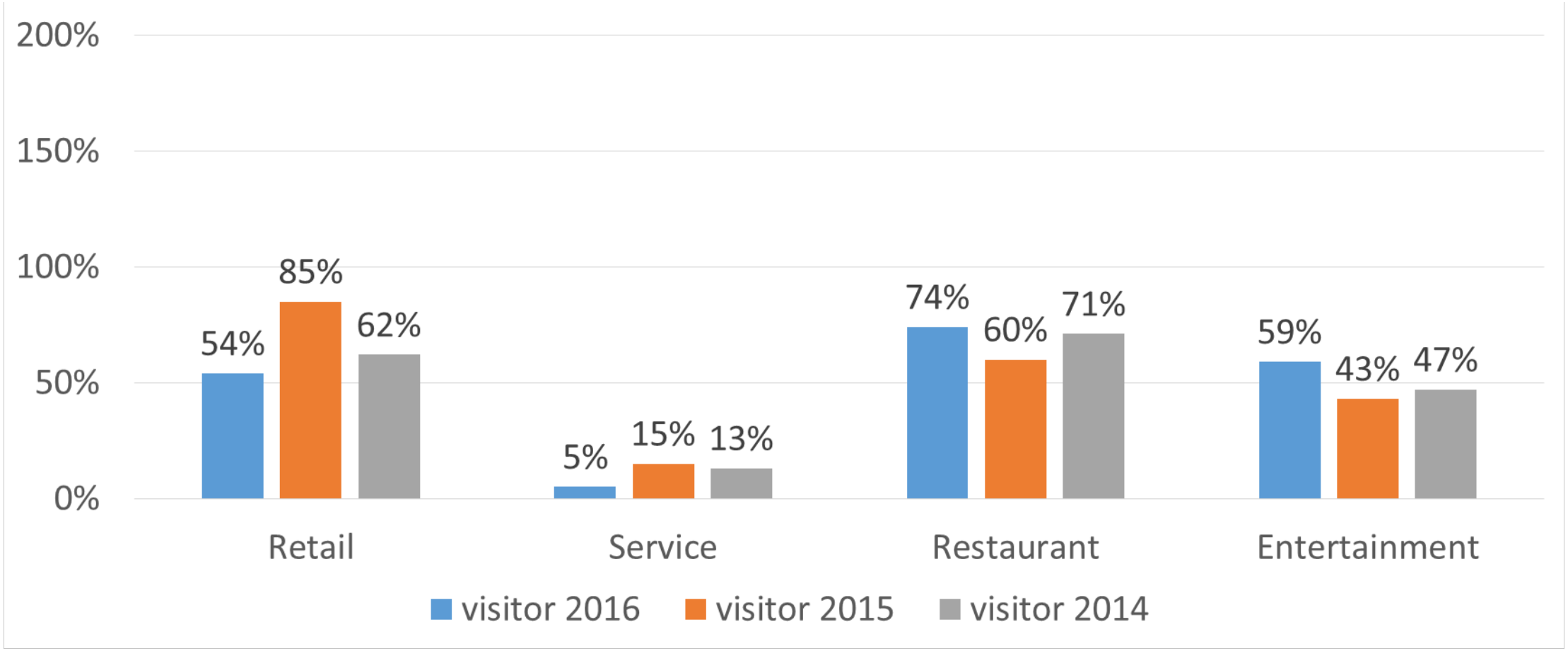
Likelihood of Visit: Resident



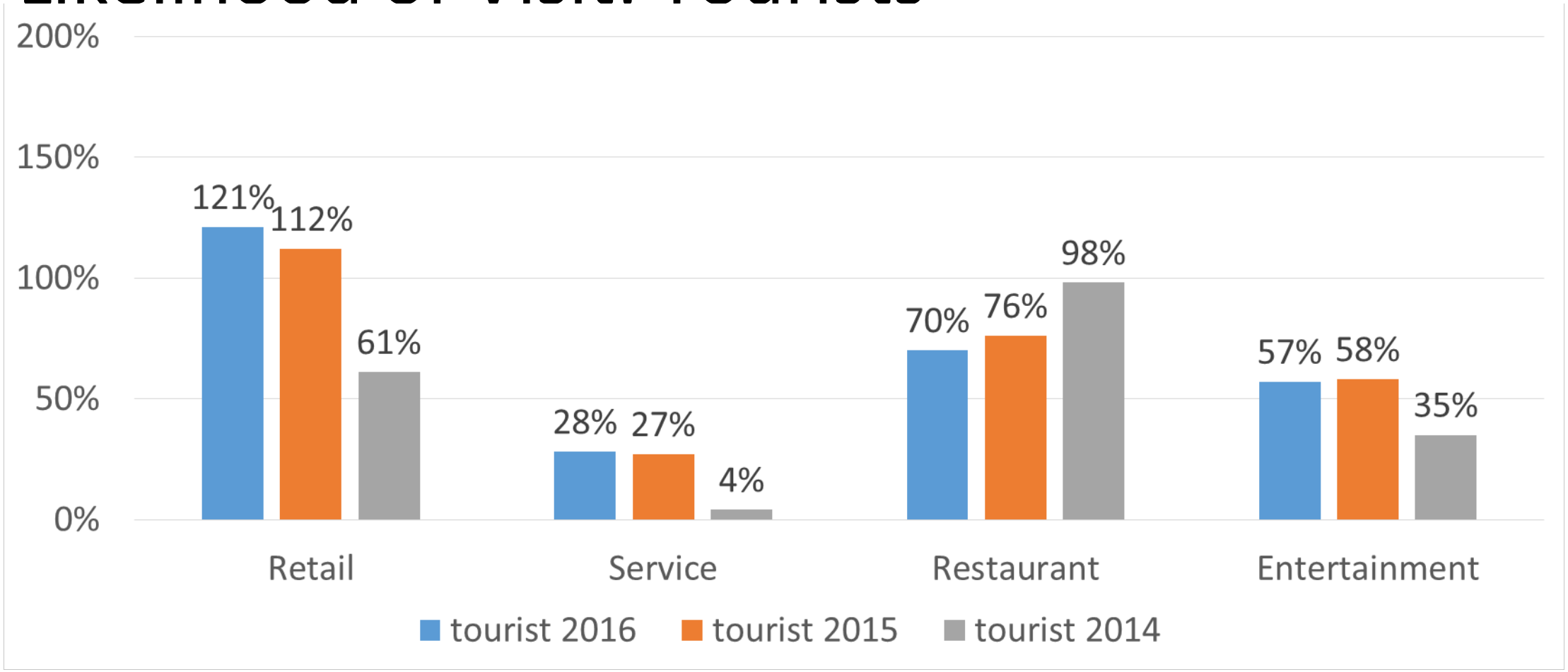
Likelihood of Visit: Worker



Likelihood of Visit: Visitor



Likelihood of Visit: Tourists



Six Economic Profiles

Loyal Locals

Resident Champions

Volume Visitors

Golden Guests

Typical Tourists

Wealthy Workers

Loyal Locals

- ***Residents that are young***
- ***Loyal and frequent spenders with an emphasis on retail and services***
- ***Many small purchases***
- ***But aggregate significance***
- ***Particularly for service businesses.***

Loyal Locals: 2014 ~ 2016

- No difference in rating of DTLB
- Less preferred DTLB
  - 60% → 71% → 54%
- No difference in amount of per visit spending
- $26,000 → $32,700 → $35,400

Resident Champions

- ***Residents with the distinction that they love DTLB***
- ***They visit more businesses and spend a little more***
- ***Big promoter of DTLB***
- ***Big economic impact***

Resident Champions

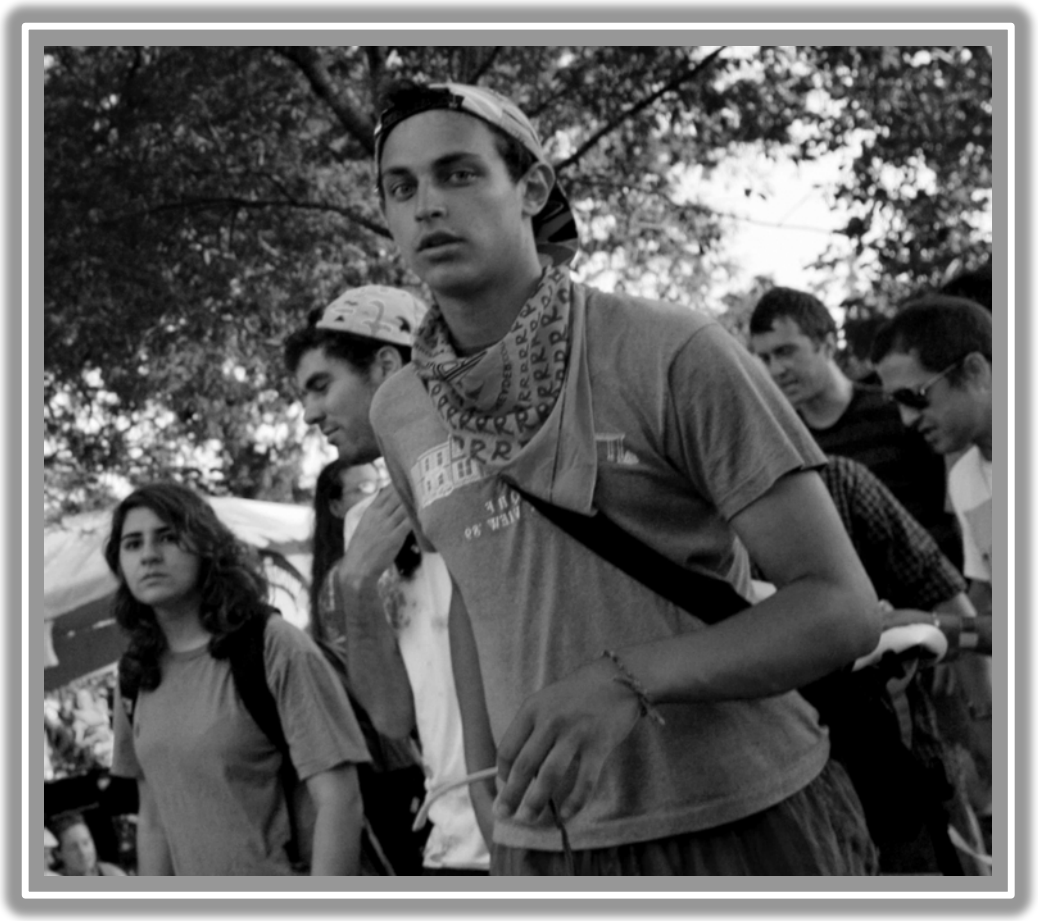
- Stable Preference of DTLB
  - 68% → 73% → 68%
- No statistically significant difference in spending 2015 v. 2016
- $58,900 → $42,800 → $50,100

Volume Visitors

- ***Young***
- ***Frequent visitors to DTLB***
- ***Looking for a Los Angeles-esque experience***

Volume Visitors

- No change in impression scores
  - 8.73 → 8.87 → 8.80
- Slight decrease in number of visits
  - 3.86 → 4.60 → 3.42
- Increase in DTLB Preference
  - 72% → 56% → 64%
- More money spent by per visit
  - $22.83 → $28.43 → $36.84
- $27,500 → $34,400 → $31,000



Golden Guests

- ***Older (vs. mean)***
- ***More likely female***
- ***Affluent pedestrians who visit from time to time but spend a lot.***
- ***DTLB is often not their favorite downtown area***

Golden Guests

- Small sample size (n= ~15)

- Means
  - Visit: 1.60 → 1.67 → 3.93
  - Spending per visit:
    * $19.00 → $15.25 → $45.33

- Less preferred DTLB
  - 53% → 88% → 46%

- $85,200 → $99,500 → $107,700

Typical Tourists

- ***Older***
- ***Affluent pedestrians***
- ***Likely have never been to DTLB***
- ***They are among the biggest of spenders individually,***
- ***But their numbers are few relative to the other groups.***

Typical Tourists

- Statistically significant Score increase
  - 8.22 → 8.31 → 8.74
- Less number of monthly visits
  - 0.56 → 2.59 → 1.11
- Increased DTLB Preference
  - 57% → 54% → 68%
- No difference in spending 2015 v. 2016
  - $18.00 → $54.82 → $48.40
- $61,000 → $62,500 →60,100

Wealthy Workers

- ***Middle-aged***
- ***More likely males***
- ***Commute in to work***
- ***Usually purchase lunch then leave***

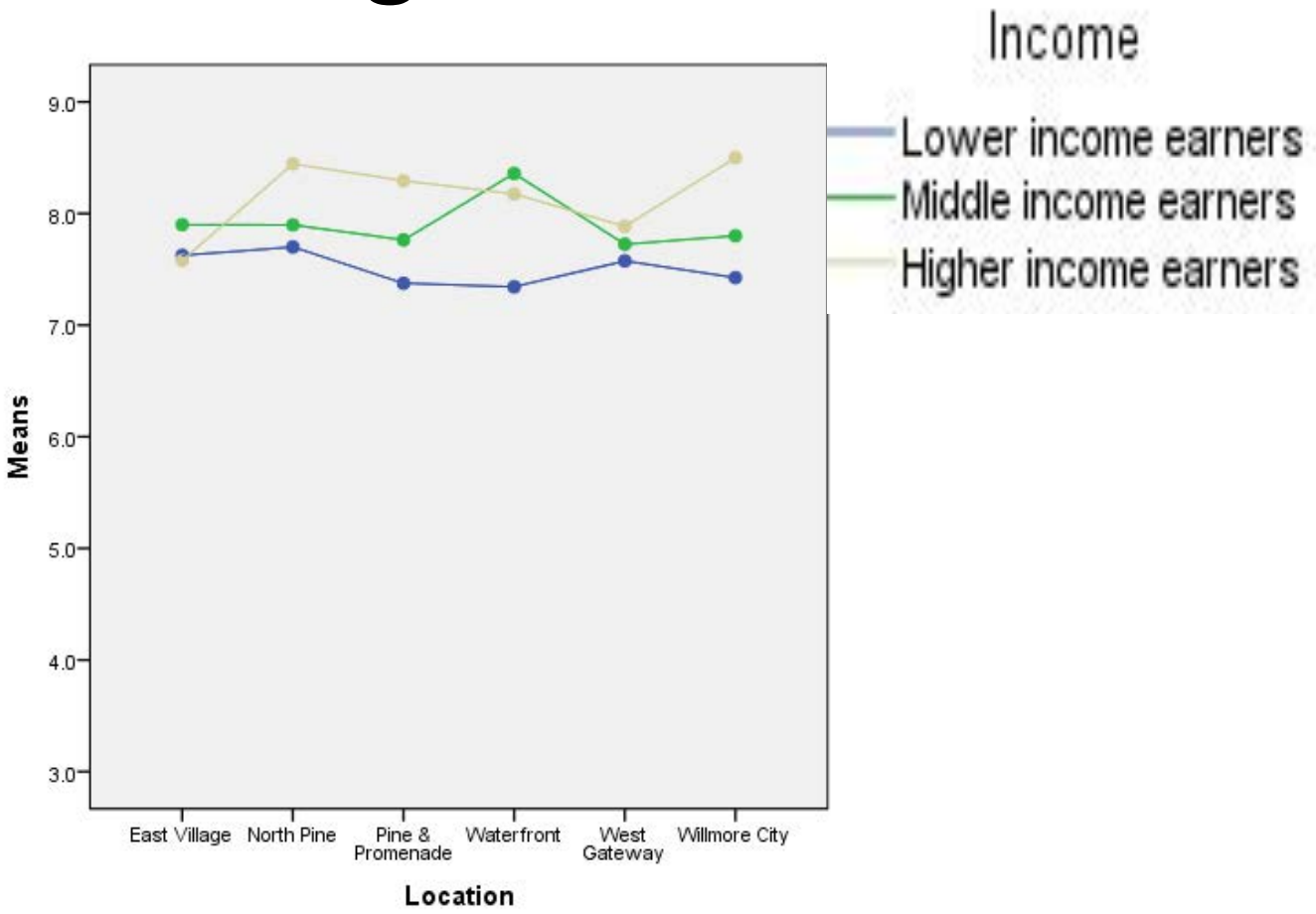
Wealthy Workers

- Lower rating
  - 8.36 → 8.73 → 7.61
- Less preferred DTLB
  - 27% → 44% → 35%
- Change in Spending average
  - $20.31 → $41.86 → $ 30.02
- $114,300 → $94,600 → $81,100

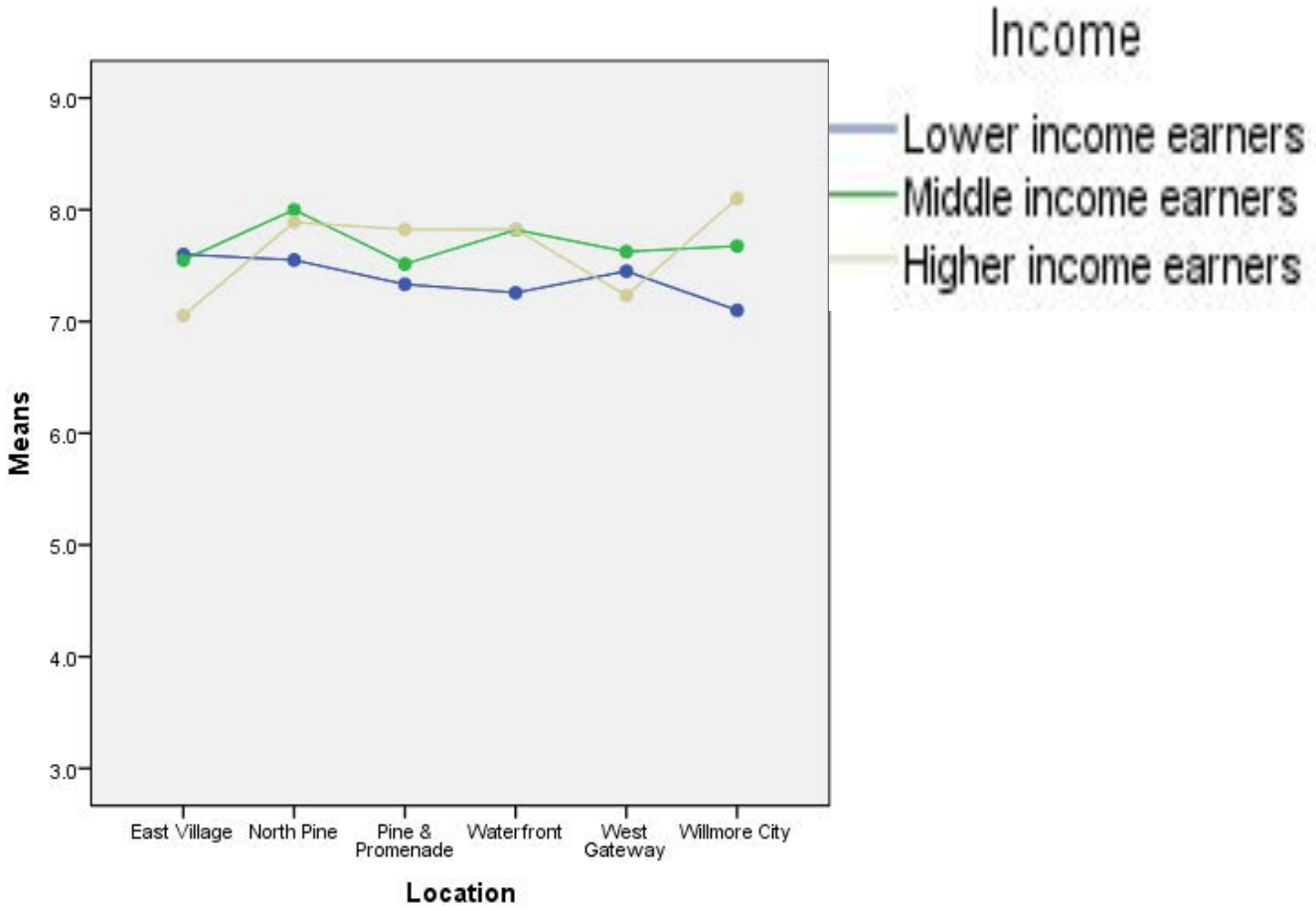
Resident Survey

Surveys completed	818
Satisfaction with DTLB	Retail, Public Services and Amenities, Requested Changes

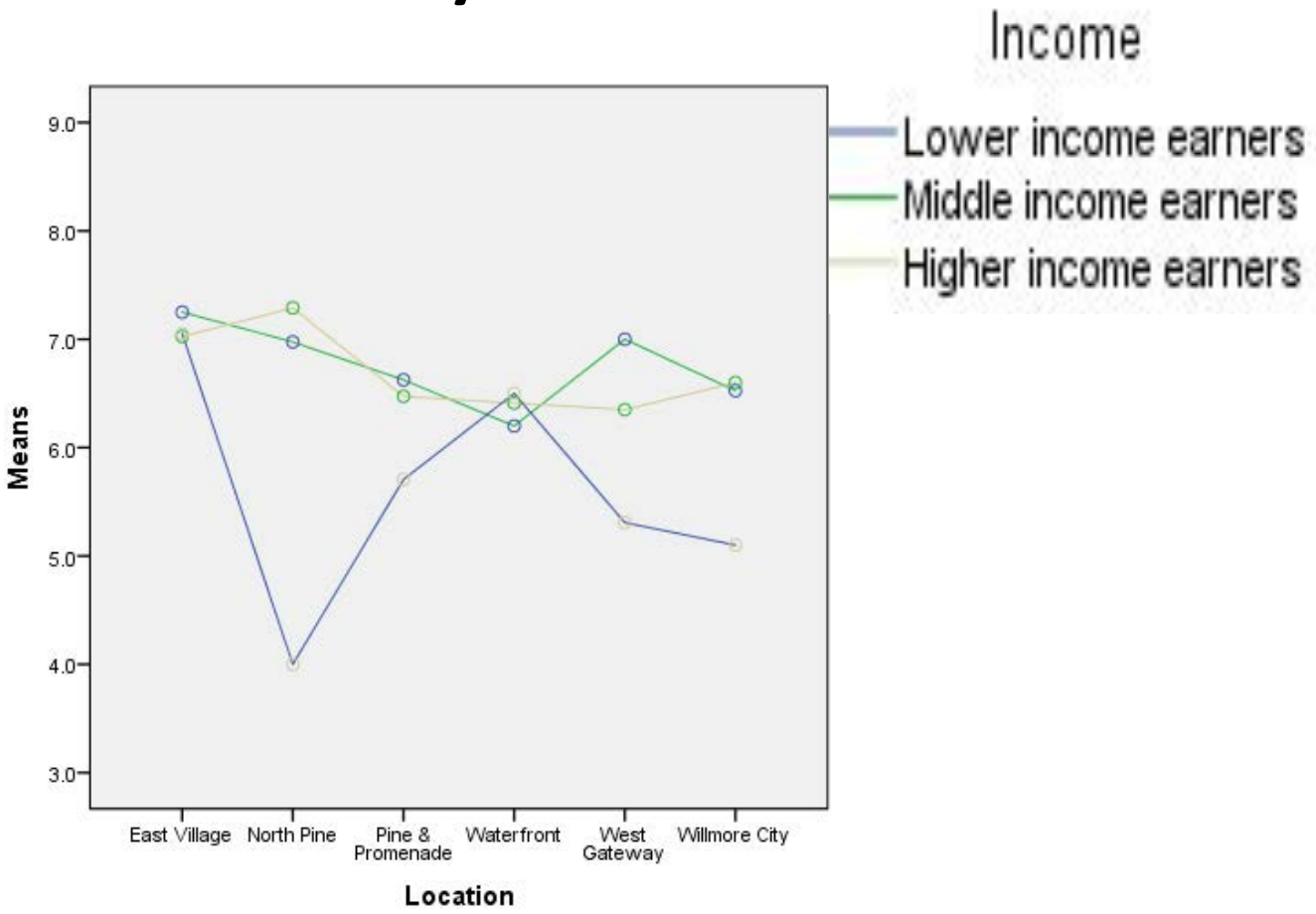
Satisfaction: Dining



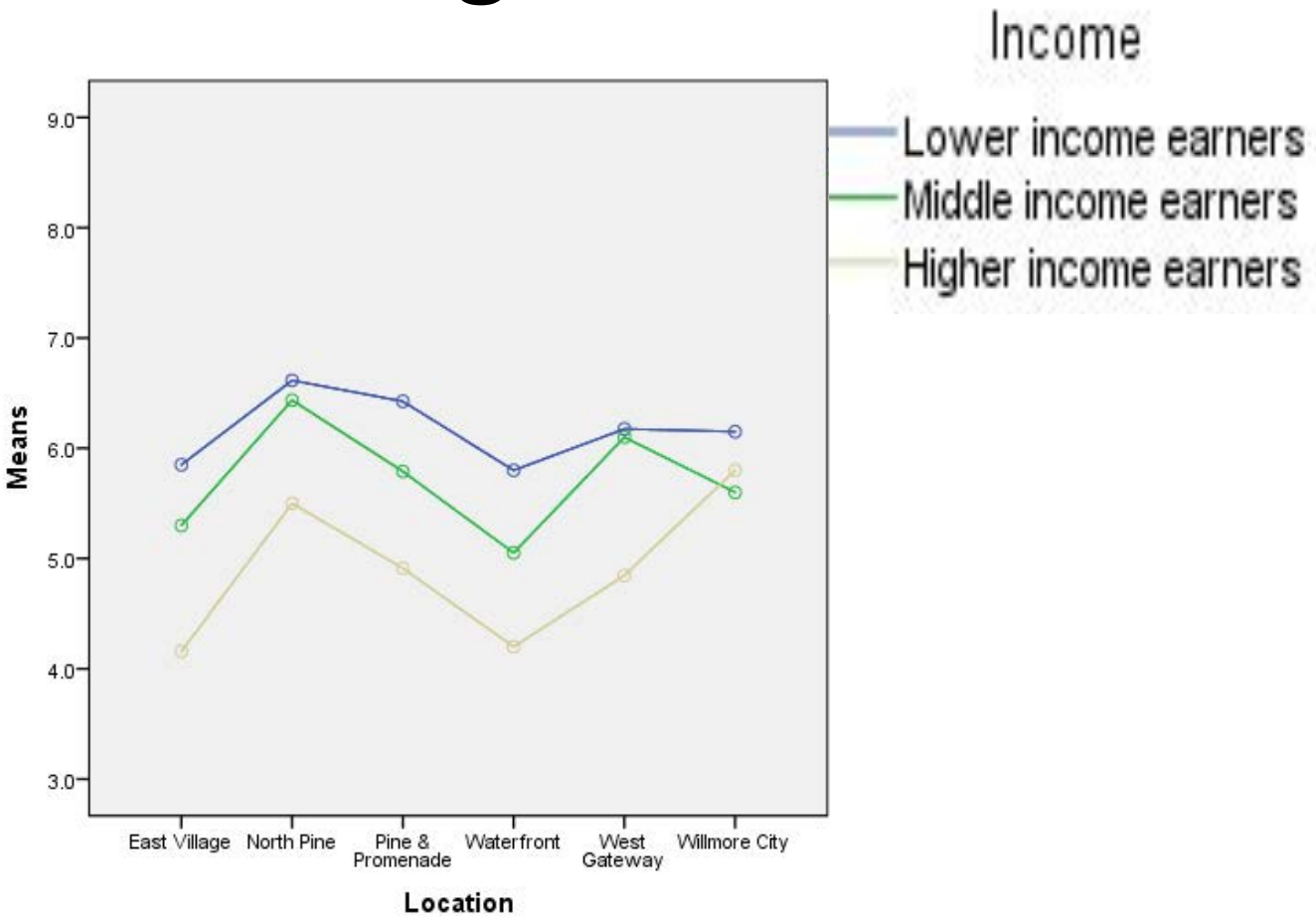
Satisfaction: Lunch



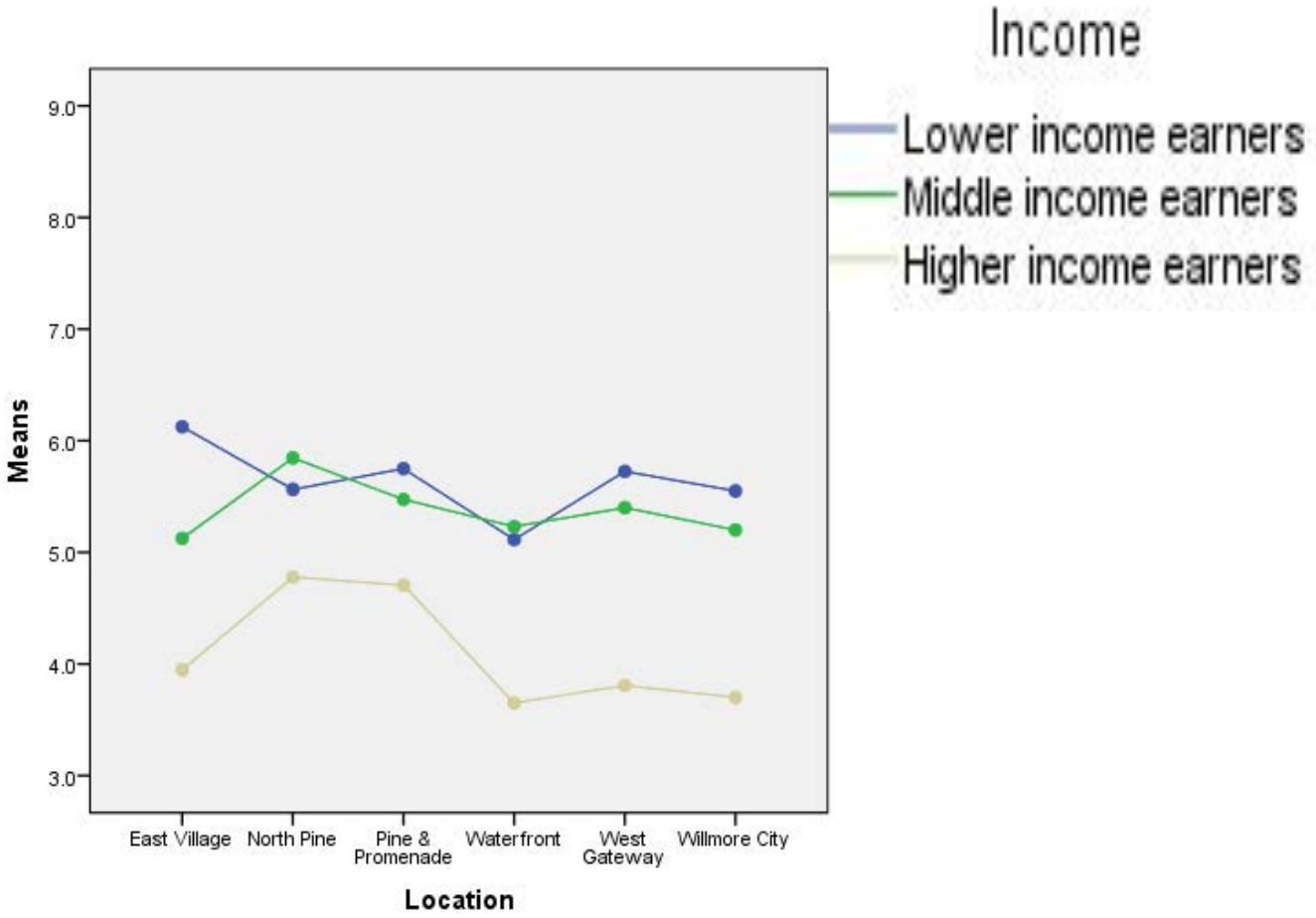
Satisfaction: Grocery



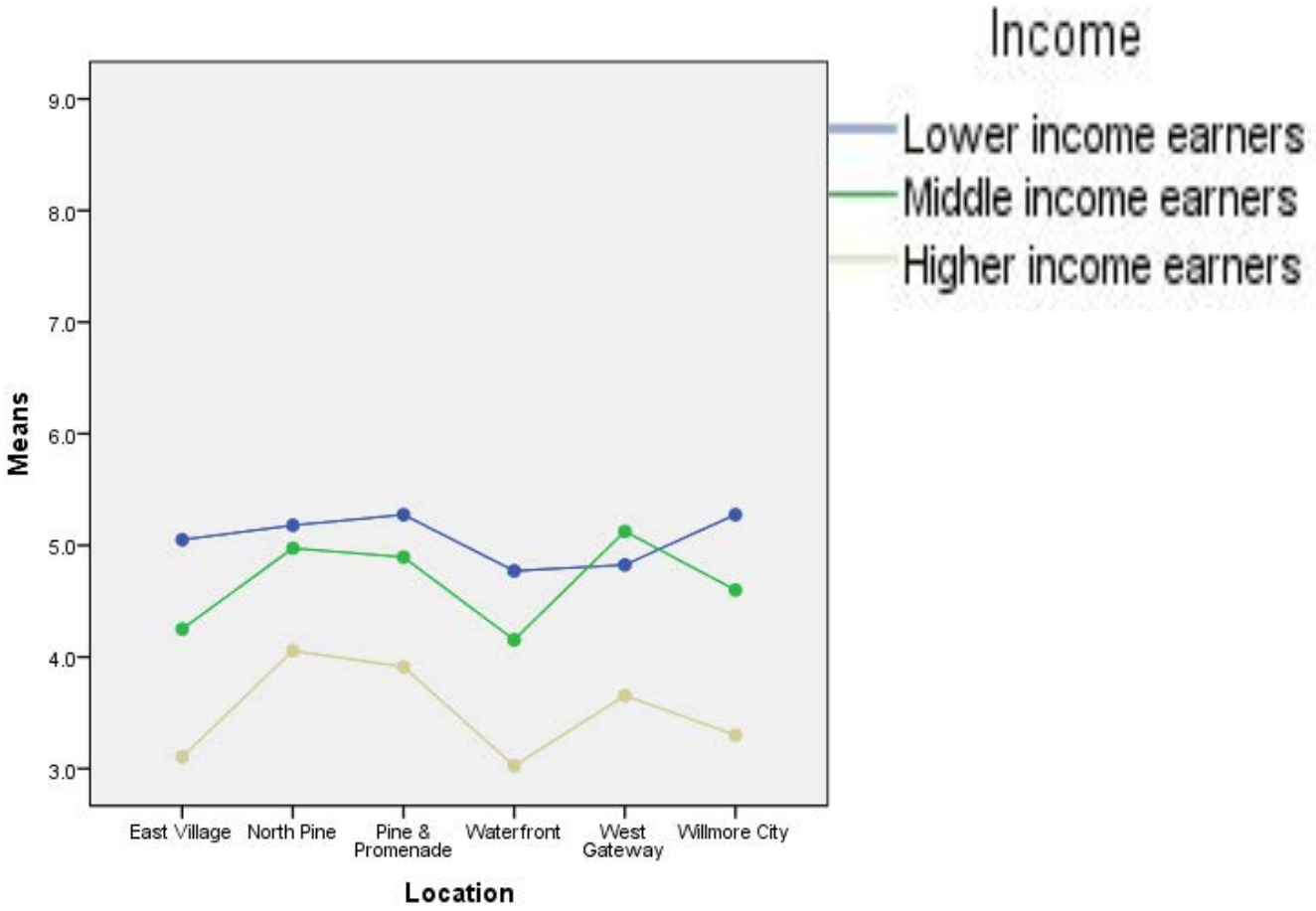
Satisfaction: Clothing



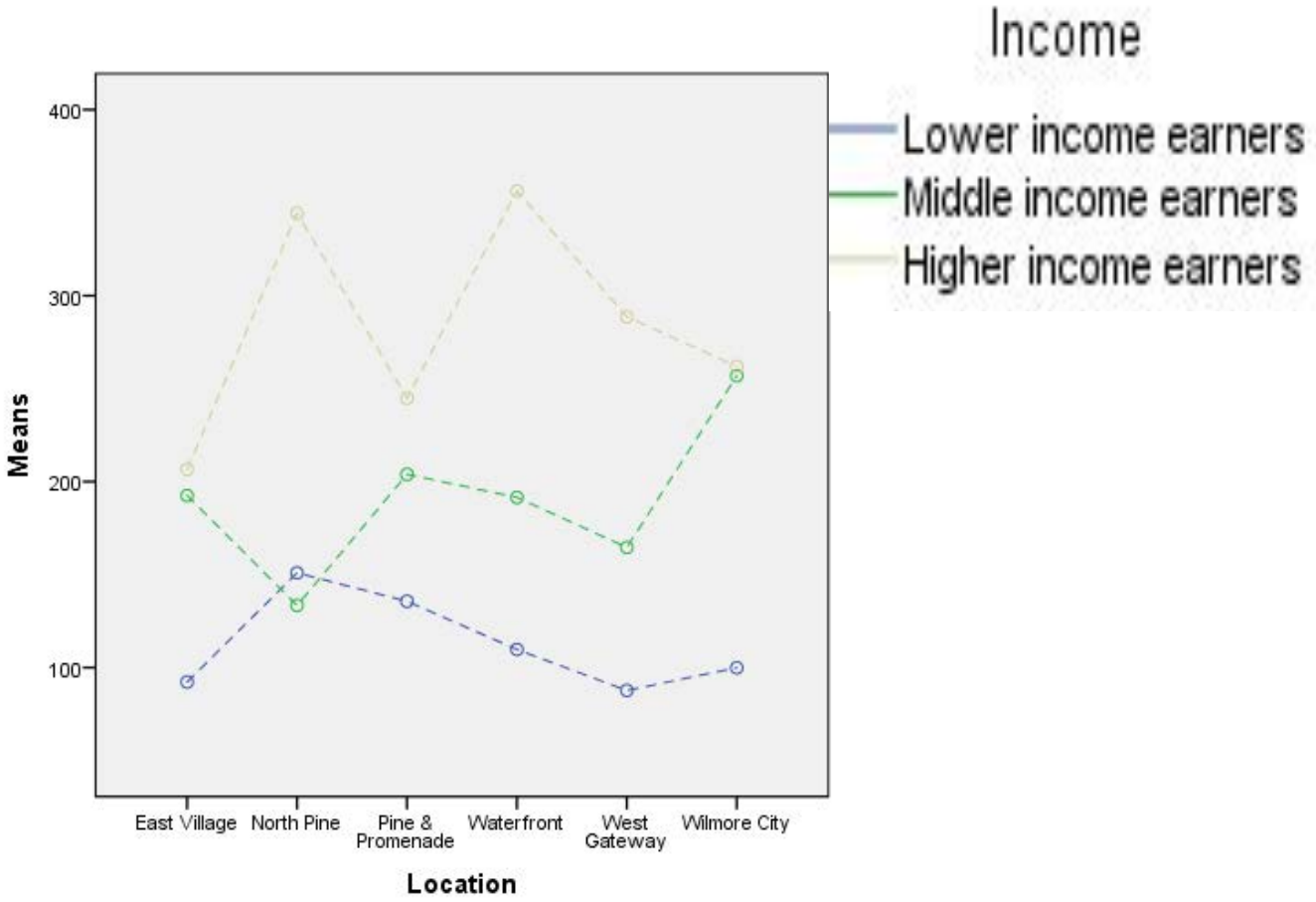
Satisfaction: Electronics



Satisfaction: Household Items



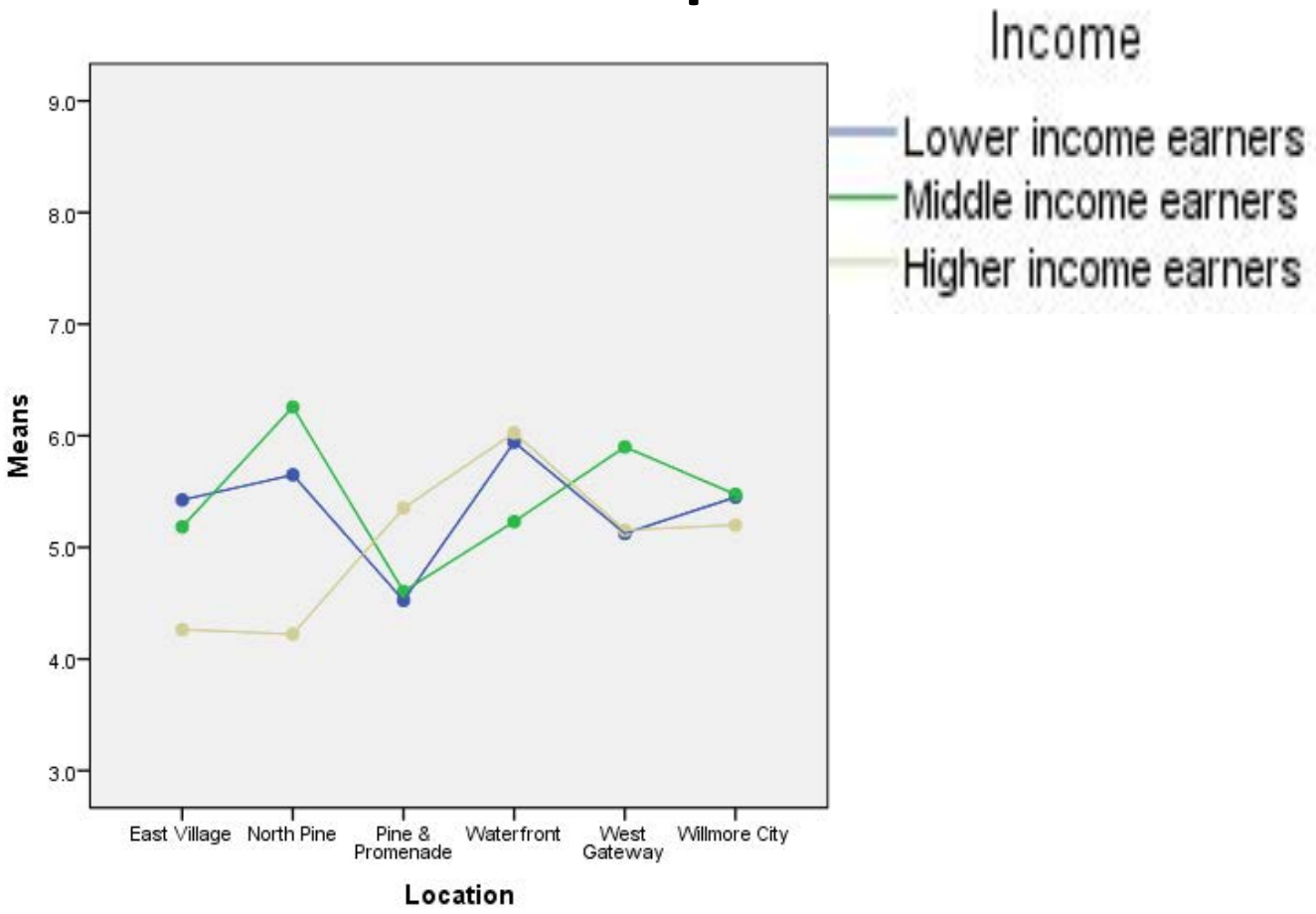
Spending outside DTLB



Requested Changes

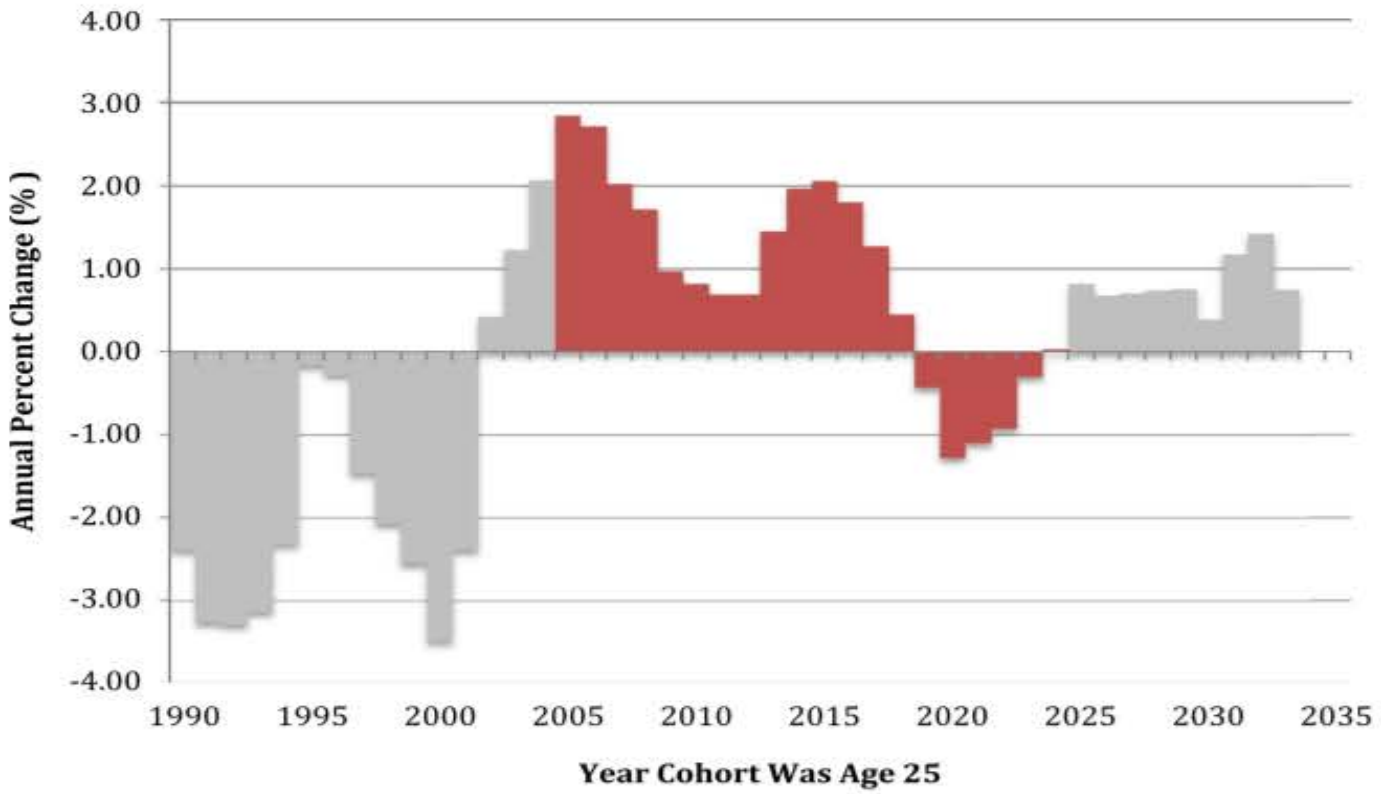
Ranking	Changes	Percentage of Answer
1st	Homeless	25.02%
2nd	Parking	15.31%
3rd	Want nothing changed	12.04%

Satisfaction: Parks and Open Spaces

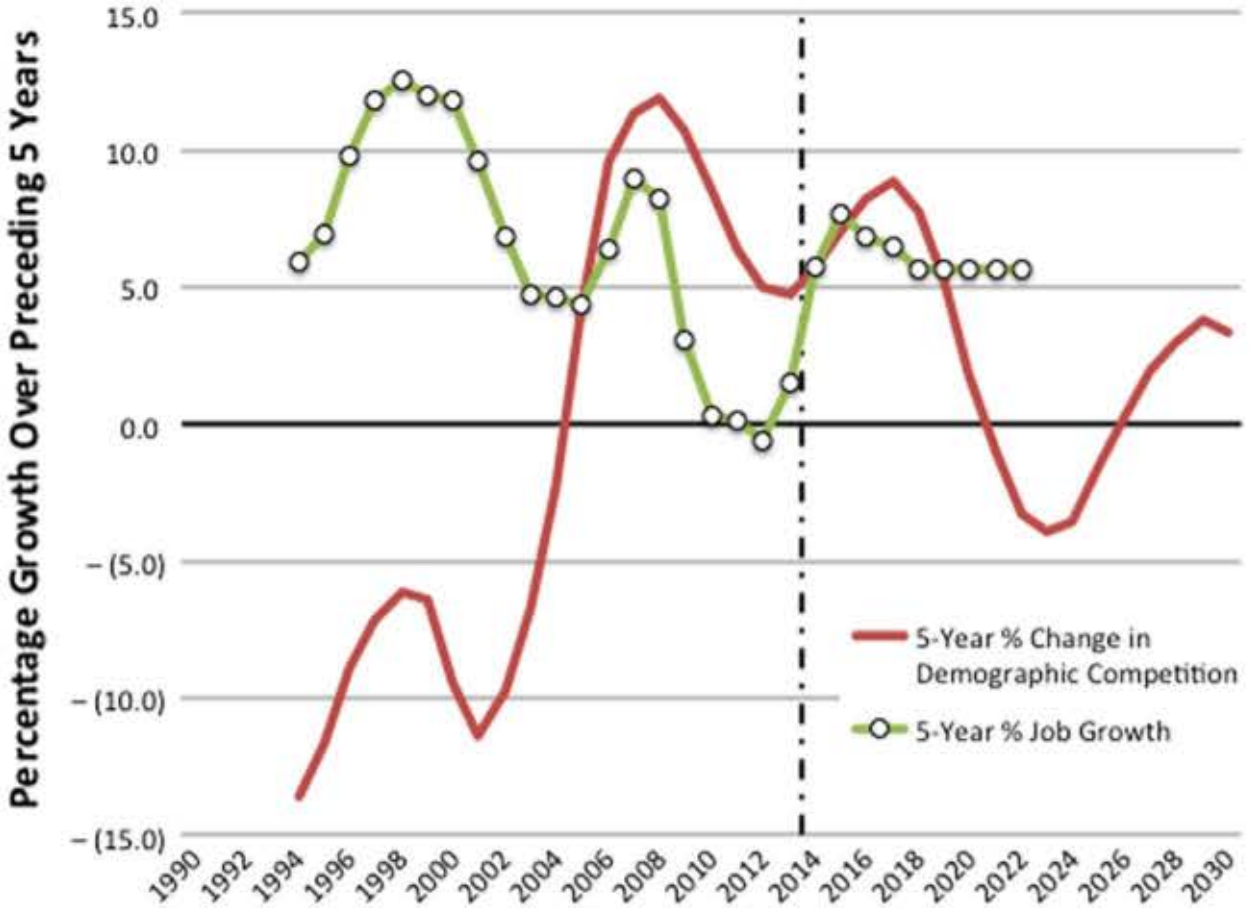


Demographic Trends

Millennials



Competition and Job Growth



4 Key Takeaways

1. Entice the workers
   In DTLB during key sales windows. Readily available to market to. Give them a reason to stay.

2. Be mindful of nation wide demographic trends
   Expand appropriately. Think of shifting needs e.g. open space

3. Bring in Retail Businesses
   That fits the tastes of residents today as well in the future e.g. Trader Joe's

4. Value DTLB's Restaurants
   Independent, multicultural, different. Foster growth.

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