S.GRONER ASSOCIATES, INC.

DLBA Pedestrian Intercept Survey Report 2016

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EXECUTIVE SUMMARY

S. Groner Associates was contracted by Downtown Long Beach Alliance to conduct a three year long longitudinal study in order to obtain demographical, economical and behavioral characteristics of its customer base. The following key observations were made in year three of the study.

1. **Net Promoter Score Stays High, but Lower than Previous Year**: Downtown Long Beach (DTLB) has a solid following and is well regarded by its customers. For the past three years, DTLB has scored above 40 in the Net Promoter Score[1] in each of the three years (a score in the 40's is considered very good and above 50 is excellent). However, this past year the number dropped from a high of +52 (2015) to a score of +46 (the lowest score in the three year study). A Net Promotor Score of +46 is a distinguished score, but as the downtown area continues to develop, keeping an eye on how this growth is managed, communicated and received by individuals working, living and playing in DTLB will be critical.

   On a classification basis, large movements were observed in Net Promotor Scores of Tourists and Workers classifications. Both differences were statistically significant.

2. **Tourists: a Bright Spot**: The Net Promotor Score of Tourists increased from 35 and 34 in years 2014 and 2015 respectively, to a Net Promotor Score of 52 in 2016. The Tourists scores had previously been the lowest amongst the four audiences. Although this constitutes a one year change in trends, it is a positive development and further understanding into what may have occurred differently this year that may have changed this perspective is warranted.

3. **The Workers – Bad News and Good News**: Conversely, the Net Promotor Score of Workers experienced a significant drop with a score of 18 in 2016 as compared to scores of 42 and 49 in years 2014 and 2015. In addition, 2016 saw a sharp increase in Detractors (those who gave a score of 6 or less out of 10) from the Worker classification.

   Further analysis of Worker data revealed a statistically significant correlation between Net Promotor Scores and the frequency of monthly visits to restaurant, entertainment and retail by Workers, whereby Workers of lower Net Promotor Scores frequented restaurants, entertainment, and retail destinations of DTLB less often than Workers who gave a high Net Promotor Score. This correlation was strong which given the significant drop in Net Promotor Score poses as an interesting silver lining—better regard of DTLB by Workers will likely increase spending by this classification. This stands in contrast with residents whose visits do not correlate as strongly with their Net Promotor Scores due to DTLB's proximity i.e. regardless of resident's rating of DTLB, residents tend to spend money in DTLB due to the convenience of its closeness.

4. **Entertainment Gets the Spotlight:** The most commonly cited rationale for choosing an alternate city hub in the previous two years was by a large margin "better entertainment." "Better entertainment" remained the most cited reason for preferring another city hub this year but a noticeable decrease has been observed. Furthermore, a statistically significant increase in

[1] Reichheld. Frederick F. (December 2003). "One Number You Need to Grow". *Harvard Business Review*.

spending on entertainment was observed this year compared to both 2015 and 2014. This is a sizable change in perspective and behavior that should continue to be monitored. Similarly, a statistically significant increase in restaurant visits was observed this year when compared to that of years of 2015 and 2014. Note, no data was collected to determine if there is any type of causation between the increase in entertainment spending and restaurant visits, but an intuitive examination might suggest some type of relationship; an area that could be examined in the future.

TABLE OF CONTENTS

INTRODUCTION

BACKGROUND

S. Groner Associates, Inc. (SGA) was commissioned to conduct a pedestrian intercept survey by the Downtown Long Beach Alliance (DLBA) to better understand the customers of Downtown Long Beach (DTLB). This analysis constitutes the third iteration of the three-year long longitudinal study. The results of the survey serve to inform DLBA of their future economic and public realm initiatives.

Similar to last year, the original goal of the survey was to reach 300 respondents. After the first round of surveying, 320 participant answers were gathered. A second round of surveying was conducted in order to obtain 8 additional responses due to 8 participants omitting the answers to key questions. The 8 omissions were removed and 10 additional answers were gathered resulting in a total of 322 responses.

In line with surveys of the past two years, 320 participants were randomly sampled from the Downtown Long Beach area (details are in the methodology section). The 320 participant responses were used to understand the demographical, economical, and behavioral makeup of Downtown Long Beach's customer base. An additional 100 participant answers were gathered through profile targeting in order to obtain a more robust dataset of professionals in the 25-44 age range visiting Downtown Long Beach in year 2015. This additional survey was not part of this iteration of the study nor that of year 2014.

METHODOLOGY

The intercept survey was conducted from October 20th, through October 30th of 2016. The days were stratified by time of day, and days of the week in order to diversify the audience surveyed. The same survey collection shifts from the 2015 intercept survey were used in order to maintain consistency with the established methodology. Majority of the survey data were collected in the time frames of 10:00 AM to 7:00 PM in 2014, 2015, and 2016. Late night shifts (after 7:00 PM) were utilized in 2014 but was omitted in the 2015 and 2016 survey efforts due to safety concerns of our surveyors.

Eight of the 10 locations established in 2014 were utilized this year. Pine and 6th was used in 2014 but not used in 2016 due to a lack of participants. Similarly, the Convention Center, which is regularly a popular destination within DTLB, was substituted with a different location due to an uncharacteristically low number of traffic on the particular day of surveying.

Table 1. Survey Locations: 2016 v. 2014

Age Bracket	2014	2016
The Pike	✓	✓
Convention Center	✓	
Waterfront, Aquarium	✓	✓
East Village (1st/Linden)	✓	✓
Promenade/Broadway	✓	✓
Pine/1st	✓	✓
Pine/Broadway	✓	✓
Courthouse (Magnolia/Broadway)	✓	✓
Ocean Blvd West	✓	✓
Pine/6th (Molina)	✓	

Before conducting the survey, surveyors were trained on proper survey methodology to ensure clean results. The staff was instructed to approach all pedestrians without discrepancy and were made aware of implicit biases that often impact surveyors. Surveyors used tablets with data validation tools in place to ensure data accuracy. The final data was scrubbed to standardize entries and to correct typographical entry errors.

The study segments the respondents into a range of classifications with the most significant (in terms of analysis) being the respondents' relationship to DTLB: e.g. Resident, Worker, Visitor, and Tourist. Each of the segments is a smaller sample size than the full study, resulting in higher margins of error. The smallest classification sample size is Tourist at 47 within the 322 randomly sampled dataset.

DEFINITION OF DOWNTOWN LONG BEACH

The survey was conducted entirely within DTLB as geographically defined by the map below.

DOWNTOWN LONG BEACH AREA BOUNDARY

PINE/1ST ST
EAST VILLAGE
OCEAN BLVD WEST
COURTHOUSE
PINE/BROADWAY
PROMENADE/BROADWAY
THE PIKE
PINE/6TH ST
AQUARIUM/WATERFRONT

DETAILED FINDINGS

The analysis of the survey data is divided into the following sections: Demographics, Getting to DTLB, Net Promotor Score, Understanding the Detractors, Actions in DTLB. A copy of the survey used can be found in the appendix.

DEMOGRAPHICS

The demographics section examines the top level characteristics of the survey population including age, gender, relationship to DTLB, and income. Each characteristic is cross tabulated and key findings are reported.

Similar to last year, the original goal of the survey was to reach 300 respondents. After the first round of surveying, 320 participant answers were gathered. A second round of surveying was conducted in order to obtain 8 additional responses due to 8 participants omitting the answers to key questions. The 8 omissions were removed and 10 additional answers were gathered resulting in a total of 322 responses.

RESPONDENT GENDER

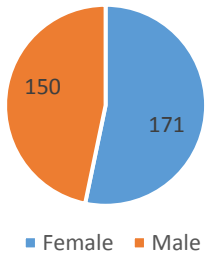
There were 171 females and 150 males who participated in the survey this year. This female skew is a departure from what was observed last year (155 females v. 159 males), as well as the census data of Long Beach which notes a sex ratio (males per 100 females) of 98.0. However, the skew is reminiscent of what was observed in 2014 (177 v. 145).

Surveyors were instructed prior to, as well as throughout the survey implementation to survey all relevant participants. Surveyors were made aware of survey biases that can occur if selection of participants were made through a feeling of comfort in speaking to a specific sex, age or other distinguishing features.

The higher rate of female respondents could be due to an actual disproportionate amount of females in the DTLB, a difference in willingness to take the survey between the genders or sample variance, of which could not be ruled out.

Table 2. Distribution of Respondent Gender: 2016

Gender	Count	Rate
Female	171	53%
Male	150	47%



RESPONDENT AGE

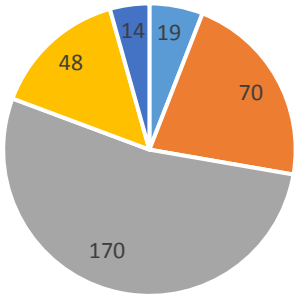
Similar to what was observed in the 2014 and 2015 survey, the largest reported age bracket was 25-44 and skewed towards younger customers. The data suggests that DTLB attracts a young adult to middle aged demographic. Given the fixed income and home-centric lifestyles of the elderly, the skew is not necessarily surprising nor arguably a characteristic specific to DTLB. Slight variation observed between the

years was not large enough to suggest a population level change in the DTLB customer base in terms of age. This suggests that DTLB continues to attract similar age groups in 2016 as it did in 2015 and 2014.

One participant refused to answer the question concerning age this year as opposed to 2014's survey efforts which resulted in 159 refusals. The refusal rate was considerably lower in 2016 due to the continuation of the survey approach adopted in 2015 of asking participants to choose from an age bracket rather than specifying a specific age.

Table 3. Distribution of Responder Age: 2016

Age Bracket	Count
Under 18	19
18-24	70
25-44	170
45-64	48
65+	14



RESPONDENT CLASSIFICATION

One key component of the segmentation analysis was the respondent's reason for visiting Downtown Long Beach. Four classifications were identified: Resident, Worker, Visitor, and Tourist. Each is defined below.

- Resident. A Resident is a respondent who lives within the DTLB zone.
- Worker. A Worker is a respondent who works within the DTLB zone.
- Visitor. A Visitor is a respondent who is coming from outside of DTLB but lives within Southern California which is defined to be between, and including, Santa Barbara and San Diego.
- Tourist. A Tourist is a respondent who is coming from outside of Southern California as defined above.

Following the method of analysis from the past reports, participants with multiple classifications (e.g. an individual who is both a Resident and a Worker) were counted once for each of the classifications that they were a member of.

The drop in Visitors observed in 2015 v. 2014 remained. The spike in Residents observed in DTLB in 2015 has settled down to the proportion observed in 2014. The proportion of Workers observed in DTLB has continued to steadily increase since 2014. The percentiles reported in the figure below represents the size of a given classification respective to the entire sample of a given year.

Figure 1. Distribution of Customer Classification Observed: 2016 ~2014

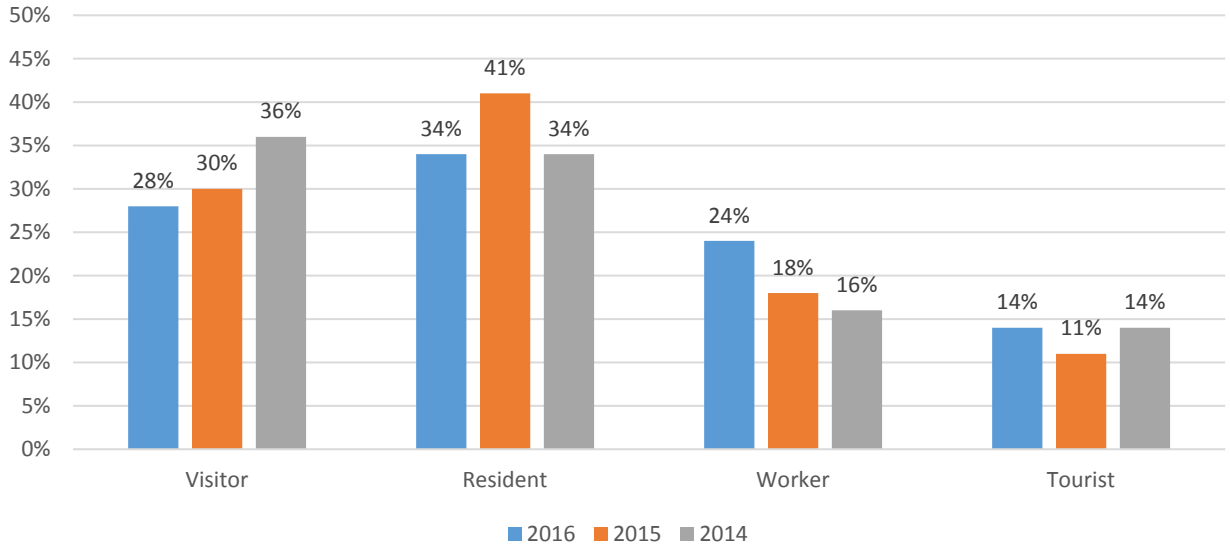


Table 4. Count of Classification: 2016 ~ 2014

Classification	2016	2015	2014
Visitor	92	101	119
Resident	112	136	115
Worker	79	61	55
Tourist	47	35	46

An inferential test between 2015 v. 2016 data sets reveal that the small variations observed between the age distribution between the two years is not significant at a population level. Given the number of omissions concerning the age question in 2014, a comparison was not conducted between 2016 and 2014.

Table 5. Distribution of Age: 2016, 2015

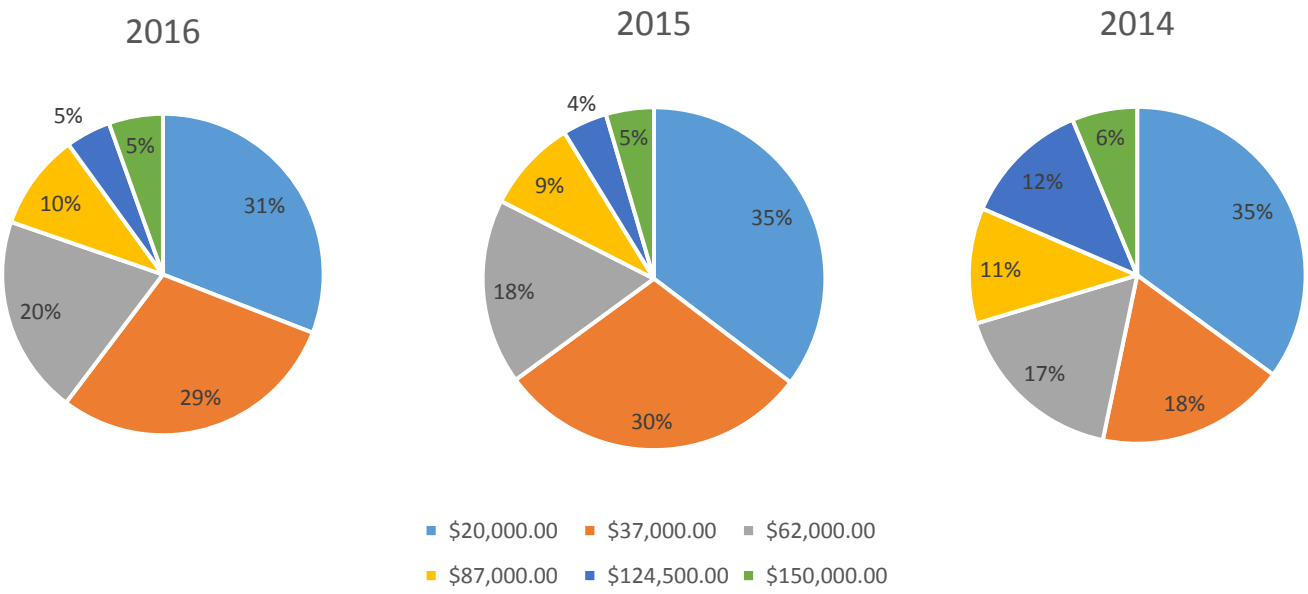
Classification	2016	2015
18-24	22%	28%
25-44	52%	48%
45-64	16%	16%
65+	4%	3%
Under 18	6%	5%

RESPONDENT INCOME

Participant income was surveyed as a key trait of interest. Eight of the original 320 participants surveyed declined to share the information concerning respondent income. The eight participants who declined to share the information were excluded from the analysis due to the incompleteness of their answer set. Ten additional participants were recruited to make up the difference, resulting in a final participation count of 322. In conducting analyses on the responses, a value was assigned to each bracket equal to the median value of the bracket. The lowest bracket of "Under $25,000" was assigned a value of "$20,000" and the highest bracket of "over $150,000" was assigned a value of "$150,000."

The mean income of participants was $51,635 this year, which is higher than last year's income of $48,574 but lower than 2014's recorded mean income of $58,600. Inferential statistical tests were used to ascertain if the difference in sample means are representative of population level difference. The difference observed between the income levels of participants in 2015 v. 2016 was too small to statistically infer that the increase in mean observed is present in the population level. The difference observed between the income levels of participants 2016 v. 2014, however was significant whereby income of customers of 2014 can be inferred to be higher than the income of customers of 2016. The difference between the income of 2016 v. 2014 was statistically significant but the size of the difference was small (effect size).

Figure 2. Distribution of Income: 2016 ~ 2014



Respondent income varied by classification. At $41,715, Visitors at DTLB had the lowest average income. Tourists continued to have the highest average income at $62,557. Residents of DTLB had an average income of $46,694 and the Workers had an average income of $56,108.

Income levels were segmented by customer classification to see if the decreases in overall income observed 2014 v. 2015 & 2016 were due to an income change within a specific customer classification over the years. As the table below shows, the decrease in income observed is due to a decrease in higher income individuals across all customer classifications.

Table 6. Respondent Income by Income Bracket and Respondent Classification: 2014

Age	Resident	Worker	Visitor	Tourist
<$25,000	37%	44%	30%	28%
$25-$49,000	19%	16%	22%	13%
$50-$74,000	19%	5%	21%	24%
$75-$99,000	6%	9%	15%	11%
$100-$149,000	12%	15%	9%	15%
$150,000	8%	11%	3%	9%

Table 7. Respondent Income by Income Bracket and Respondent Classification: 2016

Age	Resident	Worker	Visitor	Tourist
<$25,000	34%	23%	40%	19%
$25-$49,000	33%	34%	25%	21%
$50-$74,000	18%	24%	12%	34%
$75-$99,000	6%	11%	10%	15%
$100-$149,000	3%	5%	5%	6%
$150,000	6%	3%	8%	4%

Table 8. Respondent Income by Income Bracket and Respondent Classification: 2015

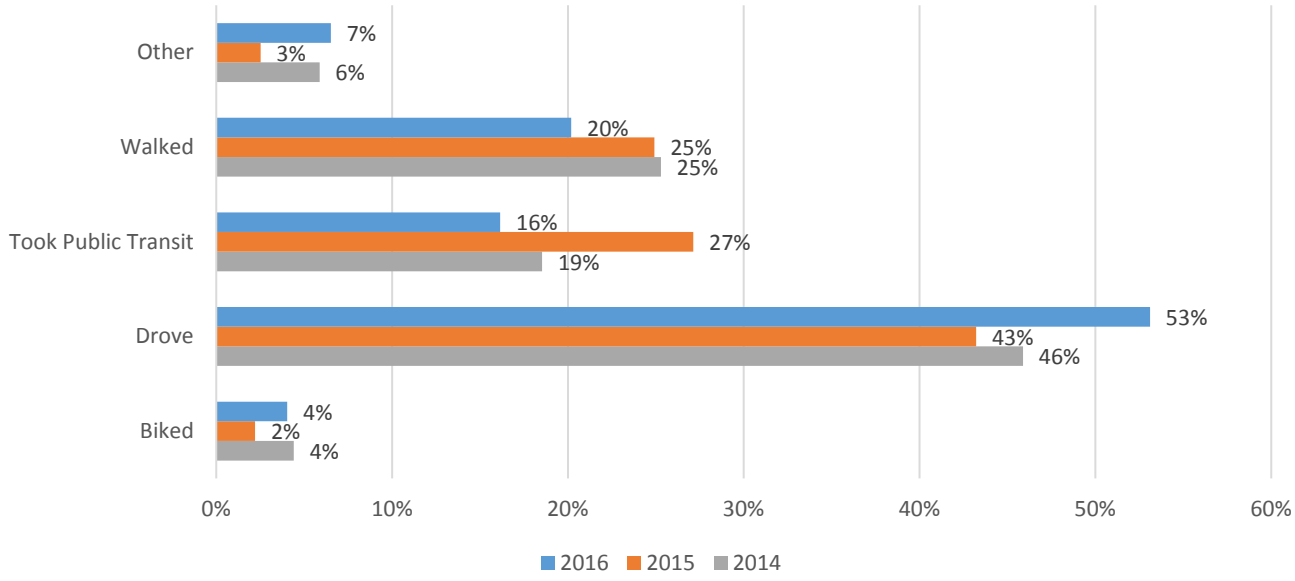
Age	Resident	Worker	Visitor	Tourist
<$25,000	43%	25%	37%	20%
$25-$49,000	27%	3%	34%	26%
$50-$74,000	15%	22%	18%	20%
$75-$99,000	5%	10%	9%	20%
$100-$149,000	4%	8%	1%	9%
$150,000	7%	5%	1%	6%

GETTING TO DTLB

Participants were asked as to what mode of transportation they used to arrive in DTLB in an open-ended manner and surveyors were tasked to classify their answers based on guidelines.

Compared to last year, a notable increase in the proportion of people who drove to DTLB was observed while the proportion of people who took public transit has decreased. The distribution of modes of transportation being observed in 2016 is closer to what was observed in 2014 than what was noted in 2015.

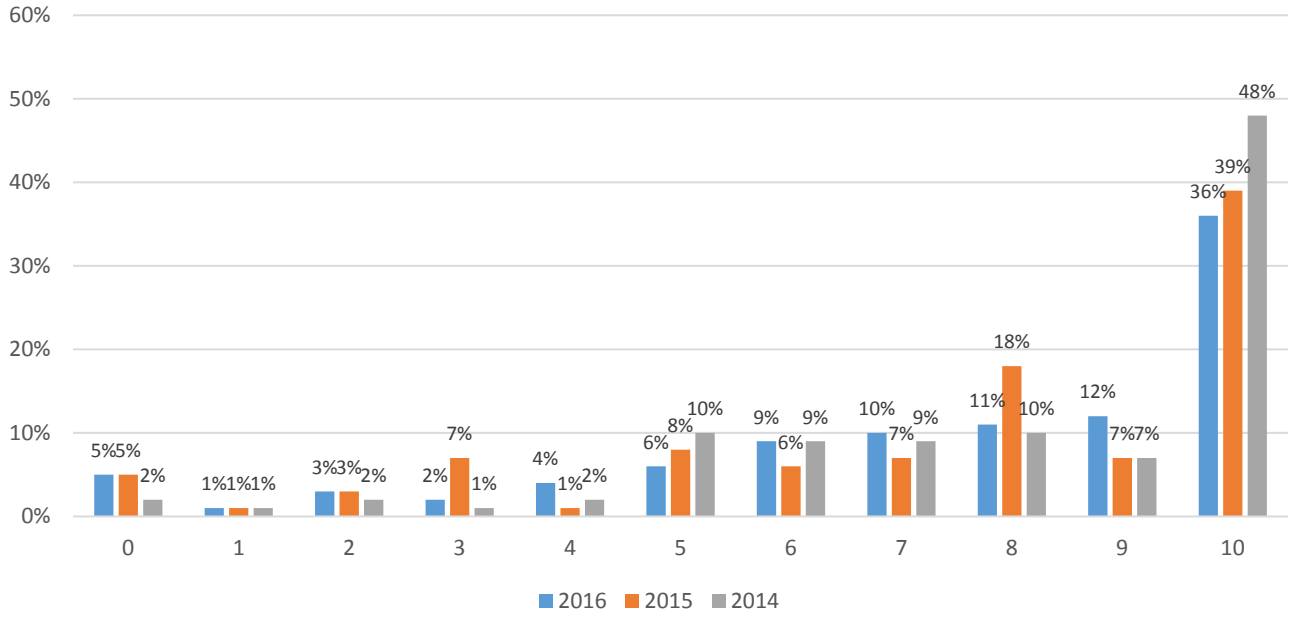
Figure 3. Mode of Transportation: 2016 ~2014



RESPONDENT PARKING EXPERIENCE

Respondents who drove to DTLB were also asked about their parking experience in DTLB. The respondent was asked to provide a numeric value from 0 to 10 with 0 being difficult and 10 being easy. Of the 196 participants asked this question, 77 participants rated the parking experience a perfect 10. The mean response was 7.6 which is slightly higher than last year's mean score of 7.4 but lower than 2014's mean score of 8.

Figure 4. Parking Experience Score Distribution: 2016 ~ 2014



The scale used to report respondents' parking experiences allows the responses to be translated into a Net Promoter Score. The Net Promoter Score is further discussed in the *Feelings Concerning DTLB* section but the results of the analysis with regards to the parking experience are included here.

The DTLB parking experience has 79 Promoters out of a total of 164 respondents. And 51 Detractors were recorded, giving it a compiled score of +17. This Net Promotor Score is a point higher than last year's Net Promotor Score of +16 but falls behind 2014's parking score of +30. However, sample variance cannot be reasonably ruled out when observing the difference in Net Promotor Scores throughout the three years given the size of the difference observed relative to the sample sizes acquired.

NET PROMOTER SCORE

The Net Promoter Score®[2] is a measure of customer loyalty that offers a valuable indication of future revenue growth for a firm. When applied to a city, the Net Promoter Score provides a snapshot of not only a Visitor's likelihood to return, but also the probability that he or she will encourage peers to do the same. The Net Promoter Score is useful as a comparable baseline for past and future studies on DTLB's growth.

Question 2 of the survey instrument asked, "Based on your overall experience in Downtown Long Beach today, how likely is it that you would recommend a visit here to your friend or colleague?" This question is a baseline question used to determine the Net Promoter Score of DTLB.

The Net Promoter Score groups respondents into three populations. Those answering 9 or 10 are "Promoters"—pedestrians who are actively willing to promote the area. Those answering 7 or 8 are "Passives"—pedestrians who are not dissatisfied, but are unlikely to help generate future business through their enthusiasm for the area. Those answering 6 or below are "Detractors"—pedestrians who are dissatisfied and are more likely to dissuade future Visitors from traveling to the area.

The Net Promoter Score is calculated by the following formula:

$$\frac{Promoters - Detractors}{Total\ Number\ of\ Respondents} \times 100$$

Possible Net Promoter Scores range from -100 (all Detractors) to +100 (all Promoters). A neutral score of 0 would come from all Passives or an equal number of Promoters and Detractors. Because most customers end up being Passives, any positive score is considered "good" and a score of +50 or greater is considered "world class." Typically, Net Promoter Score comparisons have been used to compare how industries and companies relate to one another, and how they are changing over time. For instance, comparing companies within the hotel industry in 2014, the leading company, Westin, had a score of +59, whereas the trailing company, Motel 6, scored a -15. The hotel industry had a very wide score spread, whereas the Travel Website industry's score spread was not so large; leader TripAdvisor scored a +46 compared to trailer Orbitz at +20. Comparisons can also be made over time. For instance, in the financial services sector, 19 of 22 banks showed increased scores in 2014 compared to 2013, indicating a strong year for the industry. Typical scores for leading companies in different industries range from +40 (i.e. Kaiser Permanente in 2014) to +72 (i.e. Apple in 2014).

DTLB had an overall Net Promoter Score of +46 which is lower than last year's score of +52. The difference observed in the Net Promotor Score was significant at the population level in 2016 v. 2015 whereby customers rated DTLB higher in 2015 than customers of 2016. However, the size of the difference was small. DTLB's overall Net Promotor Score 2016 v. 2014 was also compared statistically. The difference in Net Promotor Score observed in 2016 v. 2014 (+46 in 2016 v. +49 in 2014) was not significant.

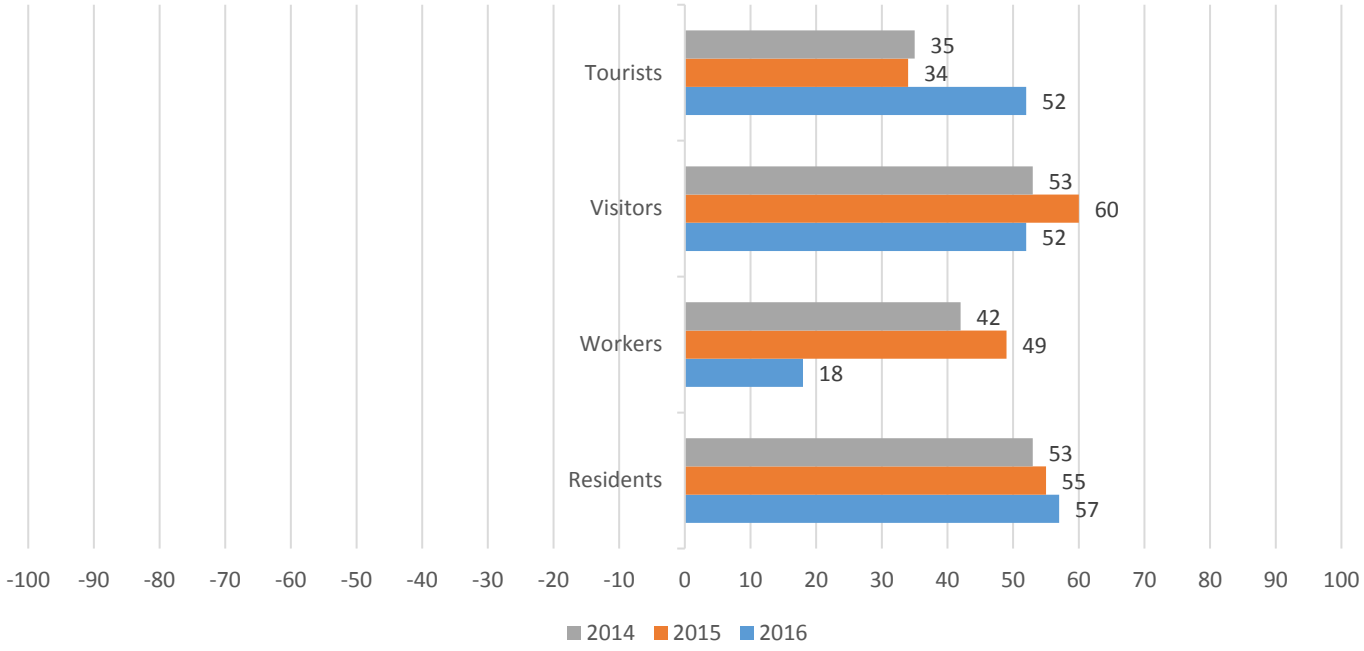
[2] Net Promoter® and NPS® are registered trademarks and Net Promoter Score and Net Promoter System are trademarks of Bain & Company, Satmetrix Systems and Fred Reichheld.

Two large movements were observed when comparing the DTLB Net Promotor Scores per classification. The Net Promotor Score of Tourists increased from 35 and 34 in years 2014 and 2015 respectively, to a Net Promotor Score of 52 in 2016. Net Promotor Score of Workers on the other hand experienced a drop with a score of 18 in 2016 as opposed to scores of 42 and 49 in years 2014 and 2015. Both differences were statistically significant.

Table 9. Respondent Net Promoter Score of DTLB by Classification: 2016

Classification	Residents	Workers	Visitors	Tourists
PROMOTER	74	64	80	20
PASSIVE	27	30	37	16
DETRACTOR	10	27	26	3
NET PROMOTER SCORE	+57	+18	+52	+52

Figure 5. Net Promotor Scores: 2016 ~2014



The classifications have average Net Promoter Scores as follows:

Table 10. Average Respondent Net Promoter Score by Classification: 2016

Classification	2016	2015	2014
Resident	8.78	8.73	8.81
Worker	7.83	8.55	8.55
Visitor	8.67	8.85	8.82
Tourist	8.73	8.22	8.24

Net Promotor Score was also examined across 18-24, 25-44, and 45-64 age group to see if a statistically significant difference could be observed across the different age brackets but no such relationship was found. Under 18 age bracket as well as 65+ age bracket was exempt from the analysis as there were not enough participants within those brackets.

Table 11. Average Respondent Net Promoter Score by Age: 2016

Classification	2016	2015	2014
Under 18*	8.68	9.18	9.42
18-24	8.83	8.83	8.43
25-44	8.35	8.54	8.61
45-64	8.34	8.82	8.69
65+*	9.07	8.45	10.0

RESPONDENT REGIONAL PREFERENCE

The survey included a question on whether there was a different Southern Californian downtown area respondents preferred to DTLB. DTLB was preferred over other city hubs by 56% of the participants. For the 44% of respondents who had another preference, a total of 24 different downtown areas were stated as preferable over DTLB. Those areas that appeared four or more times are listed below:

Table 12. Count of Preferred City Hub: 2016 ~ 2014

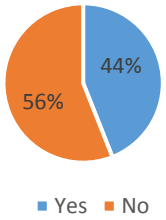
2016	2015	2014
• Los Angeles (37 mentions)	• Los Angeles (45 mentions)	• Los Angeles (29 mentions)
• Santa Monica (23 mentions)	• Santa Monica (20 mentions)	• Santa Monica (21 mentions)
• San Diego (13 mentions)	• San Diego (17 mentions)	• San Diego (19 mentions)
• Huntington Beach (7 mentions)	• Huntington Beach (5 mentions)	• Pasadena (6 mentions)

- Fullerton (6 mentions)
- Pasadena (4 mentions)
- Huntington Beach (4 mentions)
- Venice (6 mentions)

Following the trend of the previous two years, DTLB continues to be the preferred city hub of those surveyed this year (60% v 40% for the previous two years). The difference of proportions observed between 2016 v. the previous two years is likely a sampling variation. For those who have stated to prefer another city hub, Los Angeles, Santa Monica and San Diego were most frequently stated as the preferred city in three consecutive years.

Table 13. Respondent Preference for Downtown Area Other than DTLB

Preference	Rate
Yes	44%
No	56%
Total	100%

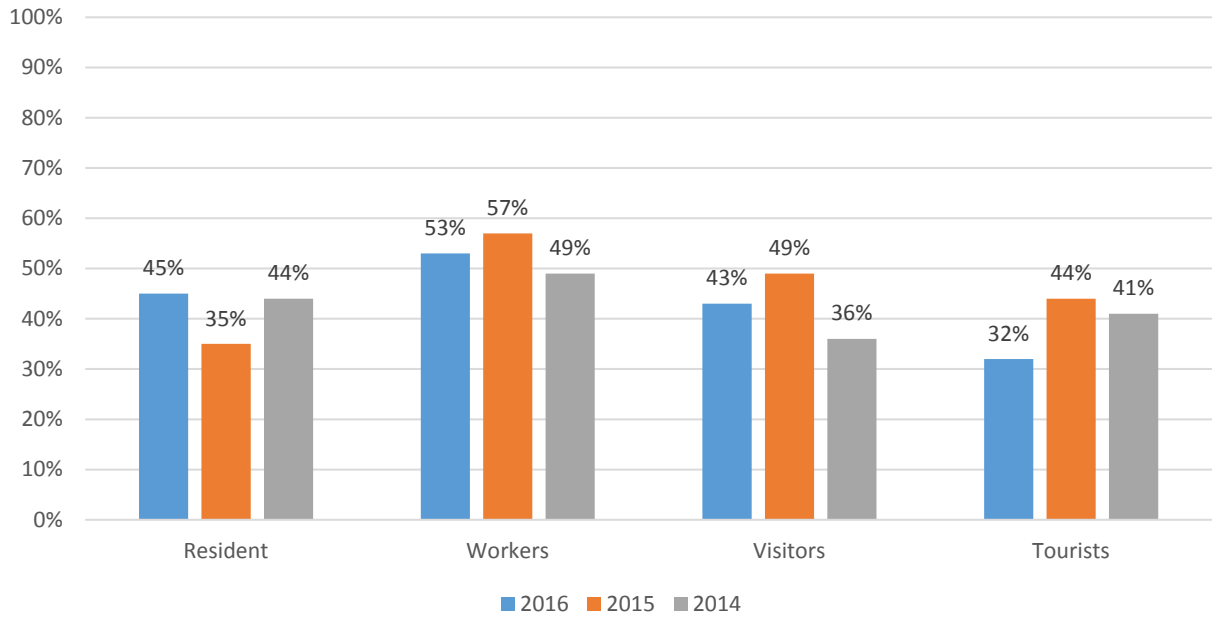


Participants were also subsequently asked the reason for their preference which is discussed in greater detail below. That question was initially open-ended, allowing respondents to provide any answer. Subsequently, the surveyors categorized the answers in one of five categories: of "better retail," "better restaurants," "better services," and "better entertainment." When respondents struggled to provide an answer, survey staff prompted them with the categories.

Of the 40 participants who answered "Other," 6 cited cleanliness and quietness of other city hubs as the reason for preference of another location and 6 participants stated convenience of location to their homes as the reason. Furthermore, of the 40 participants who answered "Other," 5 participants answered "all of the above," referring to a combination of the prompted choices.

45% of Residents, a 10% increase from last year, noted that they prefer a different city hub over DTLB this year. In contrast, Workers, Visitors and Tourists of 2016 reported preferring DTLB over other city hubs this year compared to last year.

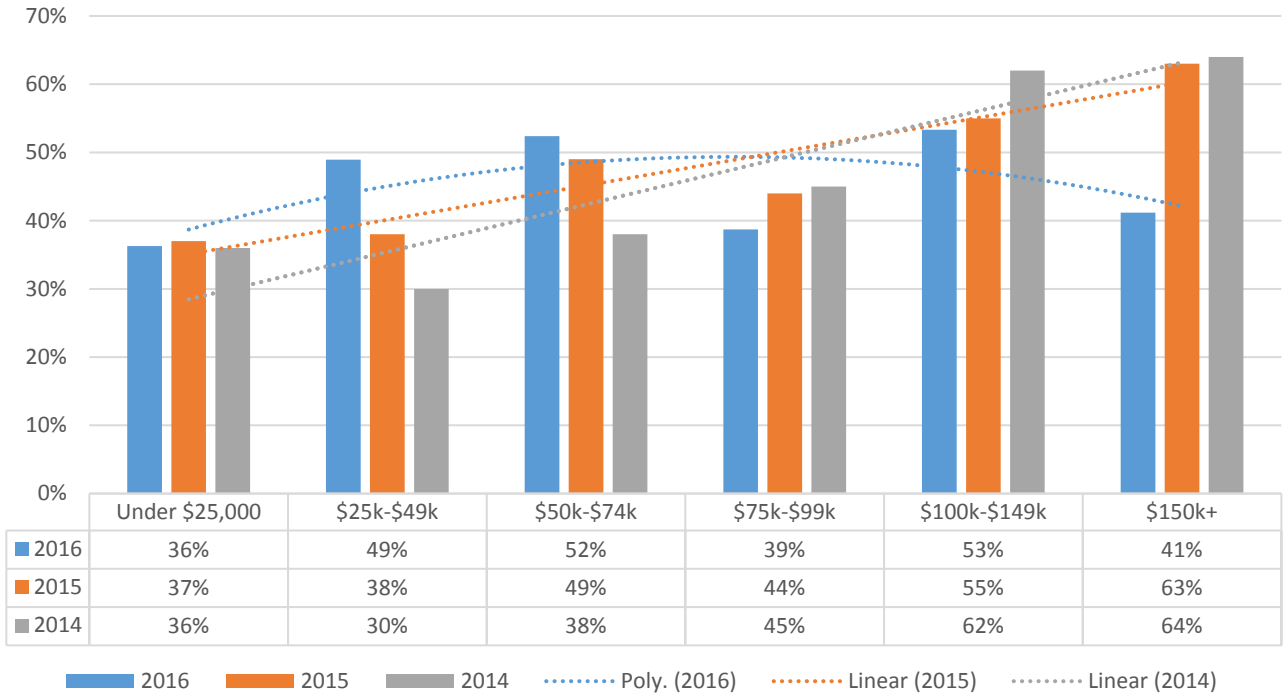
Figure 6. Respondent Preference for Downtown Area Other than DTLB by Classification: 2016



Respondents were cross tabulated by income as well to identify key trends. Respondents' preference for another city hub over DTLB increased as their income increased in both 2014 and 2015. However, this trend was not observed in 2016 and the number of higher income individuals stated a preference of DTLB over other city hubs, at a level comparable with lower income participants.

This shift in trend could be the result of: a) a growing popularity of DTLB amongst higher income customers, or b) result of random sampling variation unrepresentative of population trends. Scenario B cannot be ruled out given the small sample sizes observed in the higher income brackets.

Figure 7. Preference of another City Hub per Income Bracket: 2016 ~ 2014



	Under $25,000	$25k-$49k	$50k-$74k	$75k-$99k	$100k-$149k	$150k+
2016	36%	49%	52%	39%	53%	41%
2015	37%	38%	49%	44%	55%	63%
2014	36%	30%	38%	45%	62%	64%

Table 14. Frequency of Participants per Income Bracket: 2016

Income	Frequency
Under $25,000	102
$25k-$49k	94
$50k-$74k	63
$75k-$99k	31
$100k-$149k	15
$150k+	17

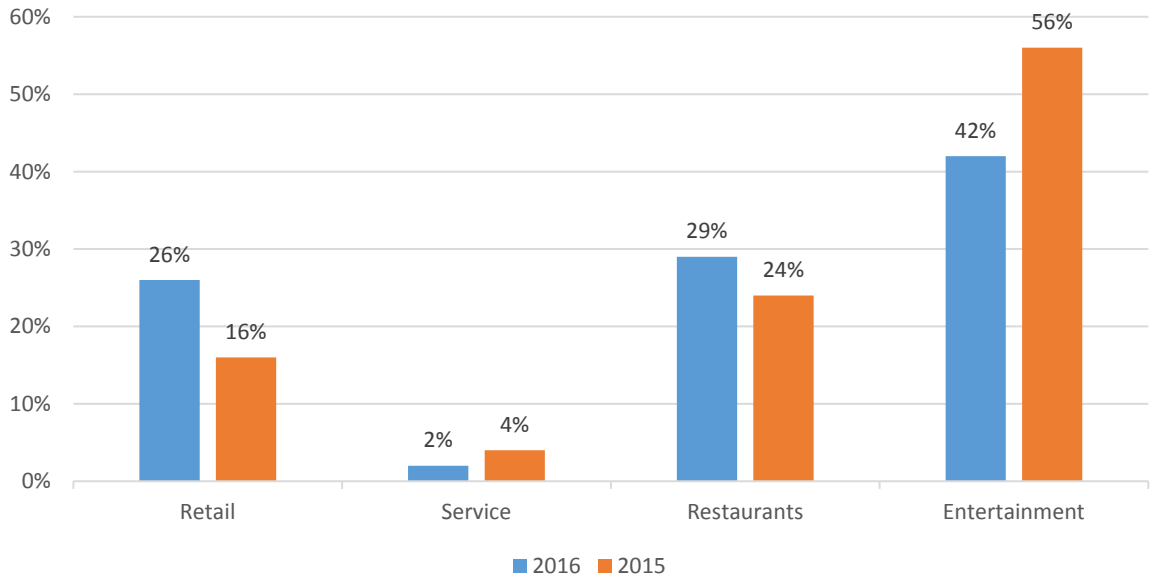
RESPONDENT RATIONALE FOR ALTERNATIVE DOWNTOWN PREFERENCE

Respondents who had a preference for an alternative downtown area were asked what made that area preferable to DTLB. They were prompted to answer with regards to four different categories: better shopping, better services, better places to eat or drink, and better entertainment and attractions. These were codified as retail, services, restaurants, and entertainment, respectively.

Furthermore, the following comparisons between classifications looks at survey data from 2016 and 2015 but excludes data from 2014. In the 2014 survey, participants were asked to state as to why they prefer another city hub and were allowed to choose multiple reasons as to why. This resulted in data that was ambiguous as many participants simply answered that they preferred another city hub due to all of the available reasons. As an example, ~40% of Visitors in 2014 stated that they preferred another downtown due to a relative deficiency in retail, restaurants, and entertainment. From this data, it can be understood that 40% of Visitors prefer another city hub due to a difference in experience of retail, restaurants, and entertainment. However, the proportion of influence per reason remains unknown and consequently, a suggested prioritization of action was difficult to ascertain. Therefore, the question was modified in 2015 onwards to simply ask the participant of their chief reason for their preference of another city hub. This brought a clearer interpretation of the results but made the 2014 data pertaining to reason for alternative preference incompatible with the data from 2015 and 2016.

The most commonly cited rationale for choosing an alternate city hub was entertainment followed by restaurants, retail and services in both 2016 and 2015. This observed ranking was also present in the answers of 2014 although the answers are not entirely comparable due to difference in design.

Figure 8. Reason for Alternative Preference: 2016 ~ 2014



The respondents were cross tabulated by survey classification to identify sub-population trends. The responses were then normalized to identify what proportion of respondents of a particular classification who had an alternative preference had a preference of a specific category. That is, for Residents, the

table shows that of Residents of 2016 who had an alternative downtown preference, 25% of that subgroup holds that preference due to superior Retail in the other downtown area.

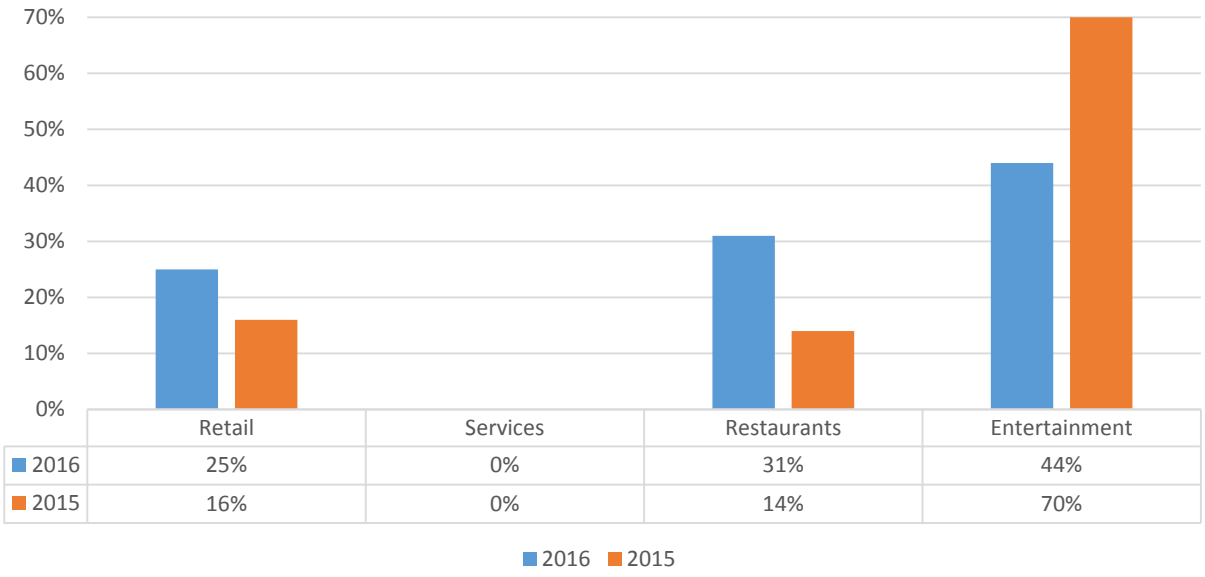
The sample size for the following comparisons were small as it excludes individuals who did not prefer another city hub to DTLB and were segmented into classifications thereafter. For example, the distribution seen amongst Tourists of 2016 is based on a sample size of 11 (the smallest sample size) whereas the distribution of Residents consisted of 49 participants. The following distributions and resulting analysis should therefore be attenuated.

Residents of 2015 were unified in their preference of another city hub over DTLB based on better entertainment options elsewhere. 2016 saw a sizable mollification of this desire with a more equal distribution amongst retail, restaurants and entertainment reasons although entertainment retained its rank.

Table 15. Count of Classification: 2016 ~ 2014

Classification	2016	2015	2014
Visitor	92	101	119
Resident	112	136	115
Worker	79	61	55
Tourist	47	35	46

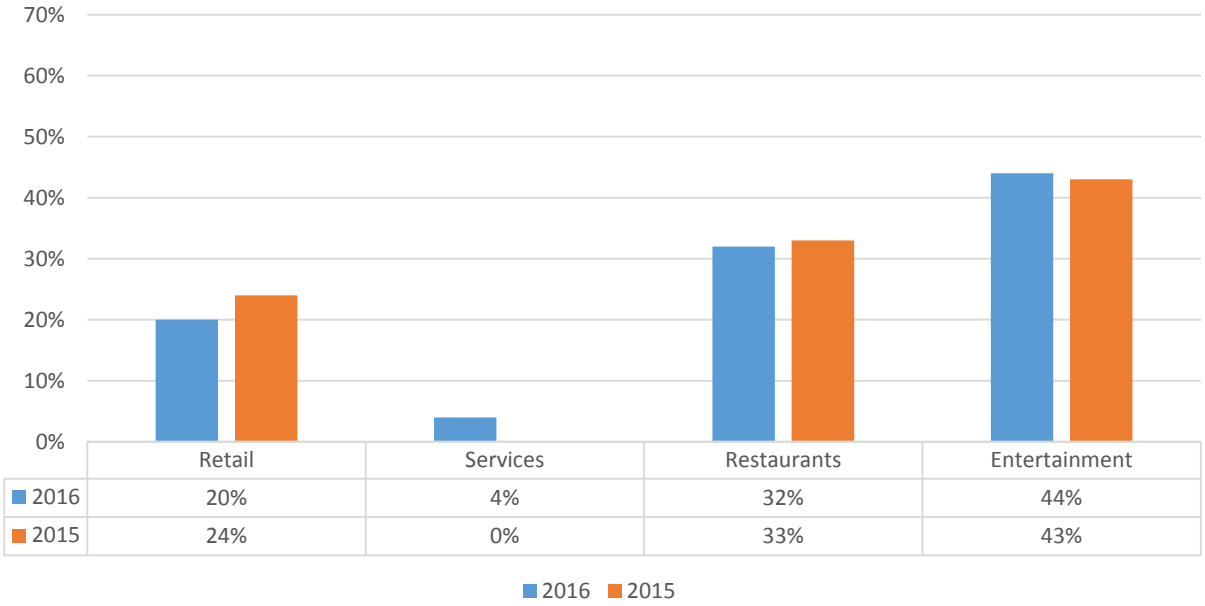
Figure 9. Reason for Another City Hub Preference: Resident



	Retail	Services	Restaurants	Entertainment
2016	25%	0%	31%	44%
2015	16%	0%	14%	70%

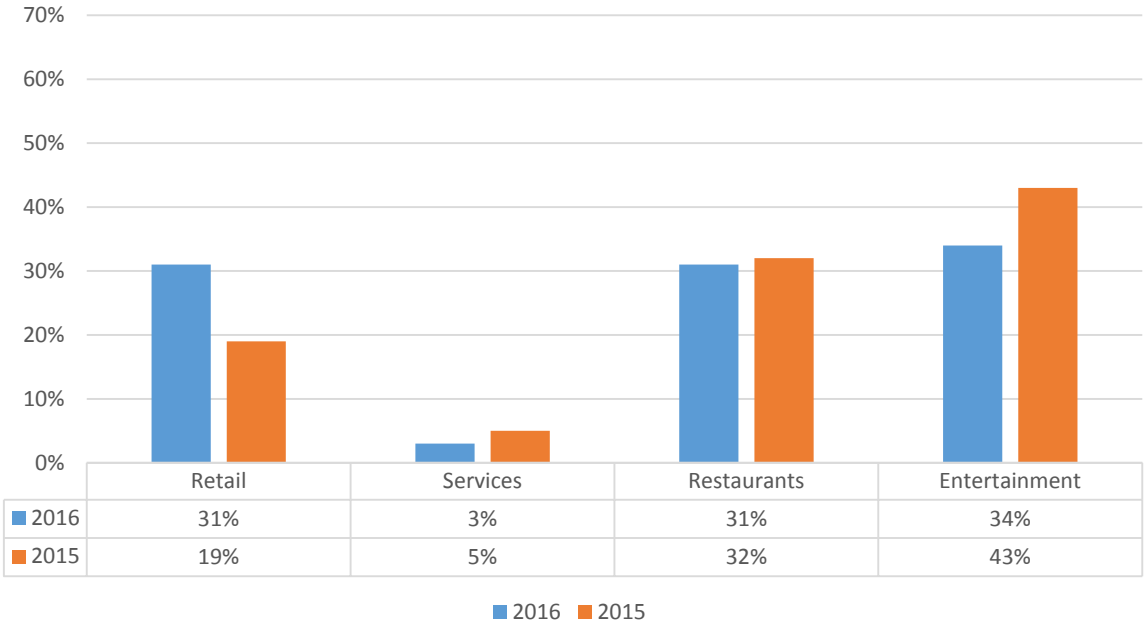
A significant difference in answers was not observed with Workers and Visitors. Very similar proportions were observed between the two years. Entertainment continues to be the dominant reason for the other preference for Workers while the difference amongst the reasons seem to be closing in terms of Visitors.

Figure 10. Reason for Another City Hub Preference: Worker



	Retail	Services	Restaurants	Entertainment
2016	20%	4%	32%	44%
2015	24%	0%	33%	43%

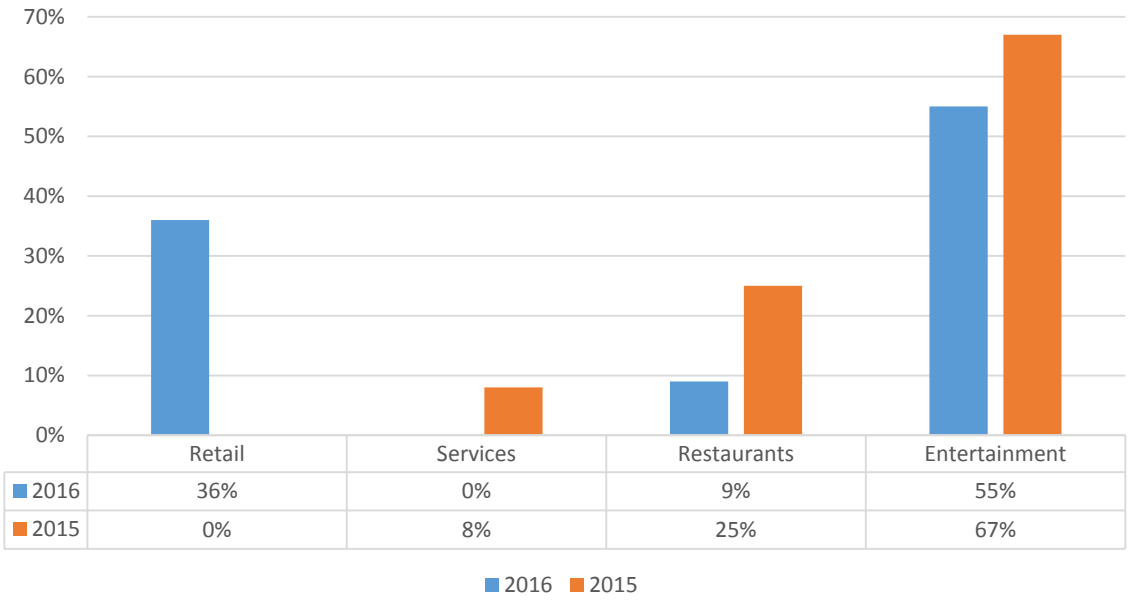
Figure 11. Reason for Another City Hub Preference: Visitor



	Retail	Services	Restaurants	Entertainment
2016	31%	3%	31%	34%
2015	19%	5%	32%	43%

Entertainment continues to be the dominant reason for another preference within the Tourist group. A spike in retail based another preference was seen while a decrease in another city hub preference based on restaurants was also observed. Tourists remains the smallest of the classifications and therefore are more subject to unrepresentative changes.

Figure 12. Reason for Another City Hub Preference: Tourists



	Retail	Services	Restaurants	Entertainment
2016	36%	0%	9%	55%
2015	0%	8%	25%	67%

Entertainment is the leading reason for alternative preference for every single survey classification. Respondents were subsequently asked "If you could pick one business that you wish was in Downtown Long Beach, what would it be?" Those answers were then codified into the four categories listed above. Interestingly, a very small number of participants listed businesses that could be classified as entertainment. This is likely due to the fact that there are very few entertainment-centric chain businesses in the United States compared to the food and retail industries. Answers such as In-N-Out are better suited to the context of the question as the business is actively expanding as opposed to a business such as the Hollywood Bowl which is very much a singular entity.

Similar to previous years, the number of "one-wish business" was identified in this year's survey with no clear consensus. They are shown in the following word map where size indicates frequency. Those businesses that appeared six or more times are listed below. Participants have continued to seek In-N-Out and Target within DTLB for three consecutive years, proving the popularity of both businesses within the DTLB customer base.

With the removal of Walmart in recent months, a notable number of participants also requested Walmart as their "one-wish business." Whether this request is reflective of the participant's desire of the specific service and price point that Walmart offers or due to the immediacy in which it came to participant's mind due to its familiarity in the area remains to be seen.

Table 16. Count of Requested Businesses: 2016 ~ 2014

2016	2015	2014
• In-N-Out (14 mentions)	• Target (18 mentions)	• Mall (15 mentions)
• Target (13 mentions)	• In-N-Out (13 mentions)	• In-N-Out (12 mentions)
• Walmart (6 mentions)	• Chipotle (11 mentions)	• Target (11 mentions)
• Trader Joes (6 mentions)	• Apple Store (6 mentions)	• Cheesecake Factory (7 mentions)

Respondents were similarly cross tabulated by income to identify trends. As above, the responses were then normalized to identify what proportion of respondents of a particular income bracket who had an alternative preference had a preference of a specific category. That is, for respondents earning Under $25,000 and who had an alternative downtown preference in year 2016, 48% of that subgroup holds that preference due to superior entertainment in the other downtown area.

Large fluctuations were observed between the years due to the very small sample size of this segmentation; e.g. the $75,000~$99,000 group for this analysis is composed of 9 participants. Any specific comparison between the two years were therefore avoided. However, there is a broader trend of most frequently citing better entertainment which holds for all income groups both in 2016 and 2015.

Figure 13. Percent of Respondents with a Preference Identifying a Business Category by Income Bracket: 2016

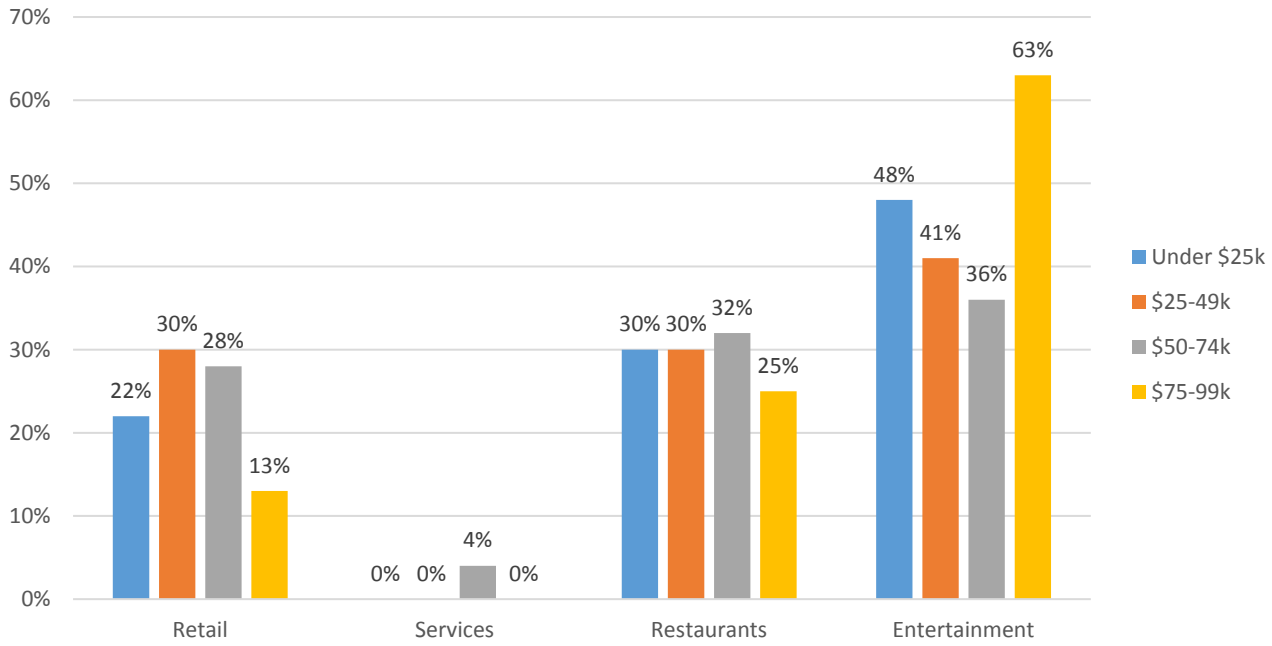
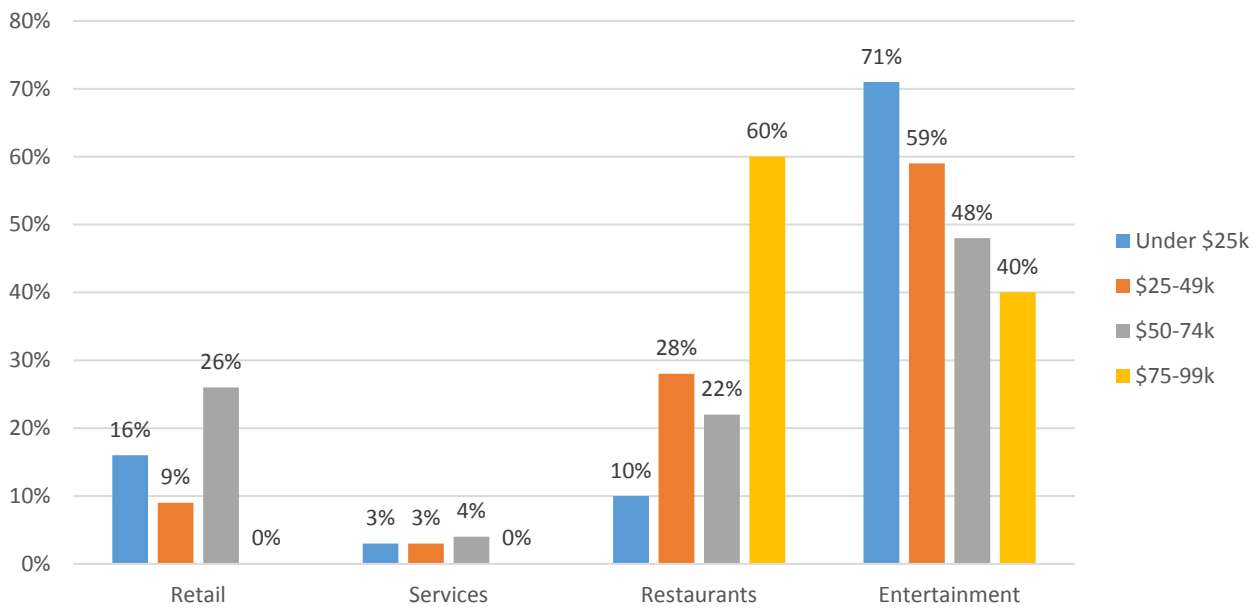


Figure 14. Percent of Respondents with a Preference Identifying a Business Category by Income Bracket: 2015



UNDERSTANDING THE DETRACTORS

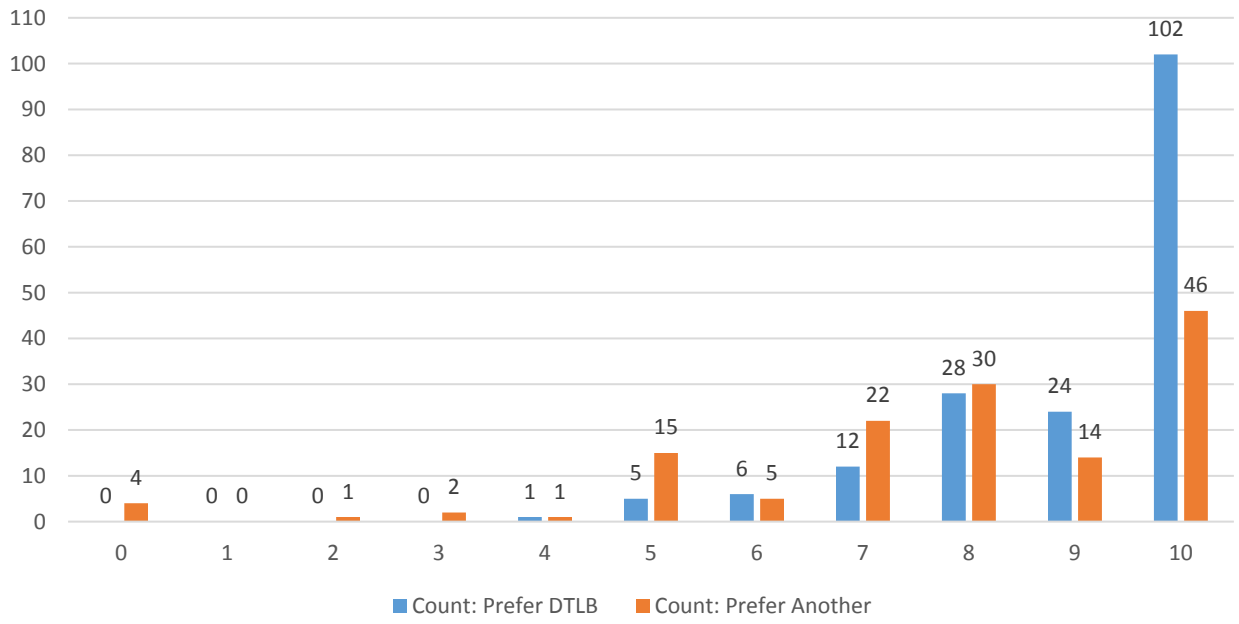
The following section takes a closer look at participants who have given a Net Promotor Score of 6 or lower to see if trends or characteristics emerged within the Detractors. The analysis compared Detractors between different years as well as merged the data in order to detect overall trends.

IMPACT OF PREFERENCE, INCOME, AND CLASSIFICATION

Unsurprisingly, there was a statistically significant difference between the Net Promotor Scores of those who preferred DTLB v. those who preferred another city hub whereby those who preferred DTLB rated DTLB higher on the Net Promotor Scores scale. The size of the difference was large.

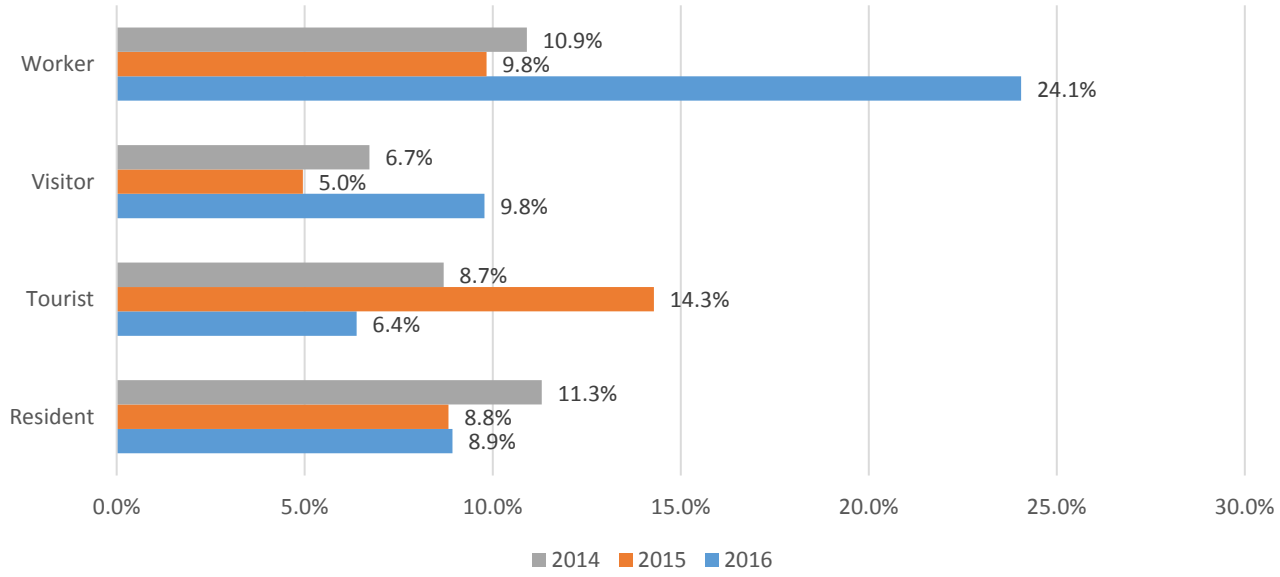
43% of those who preferred another city hub over DTLB gave DTLB a Net Promotor Score of 10 or 9, highlighting the fact that a preference of another city hub over DTLB does not necessarily mean a low regard of DTLB.

Figure 15. Distribution of Net Promotor Scores per Preference: 2016



Participants with Net Promotor Scores of 6 or lower were segmented and analyzed over the past three years to see if trends surfaced. The chart below illustrates the proportion of participants who gave a score of 6 or lower per classification and survey year. For example, 10% of Workers of survey 2016 gave DTLB a score of 6 or lower. Given the margin of error and the size of the segmentation, the only statistically significant change in proportion of unfavorable scores was detected within the Workers classification over the three years where a large spike in unfavorable scores was observed in 2016.

Figure 16. Proportion of Detractors per Classification: 2016 ~ 2014



Although different proportions of unfavorable reviews are observed per classification within a single year, no single classifications contributed to the unfavorable scores in an amount that was statistically significant. The only exception was in the year 2016 where a statistically significant number of Workers contributed to a negative rating of DTLB compared to Visitors, Tourists and Residents of 2016.

Data over the corresponding three years was bundled to create a robust pool of income levels and corresponding Net Promotor Scores. Although the resulting correlation observed a negative relationship between income levels and Net Promotor Scores, i.e. scores falls as income rises, the correlation was not statistically significant. Income levels and Net Promotor Scores do not have a relationship.

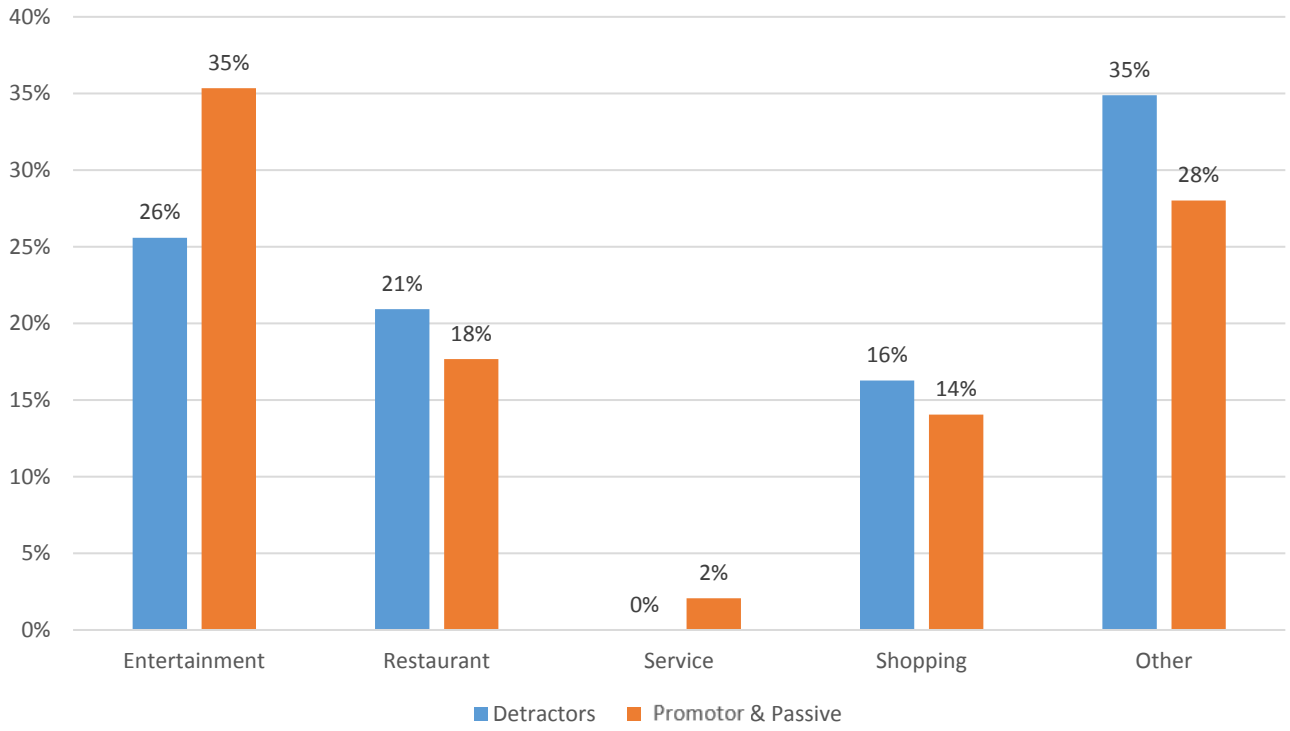
Participants who provided a Net Promotor Score of six or lower were segmented and their reasons for an alternative city hub was counted as available. No notable differences were observed between this segmentation and the general sample.

At 44% female and 55% male, a lean towards males was detected amongst the negative reviewers that was significant when compared against the sex ratio observed in the general sample. However, it is difficult to ascertain if this lean is due to a) a lower standing of DTLB amongst male customers or b) a difference in the level of agreeableness/considerateness observed between the genders that could restrain the level of forthrightness of reported scores.

A statistically significant correlation was observed between the overall Net Promotor Score and the parking score over the past three years whereby as the parking score increased, so did the overall Net Promotor Score. However, the strength of the correlation was small. Therefore, customer's experience with their parking seem to have a relation with the overall Net Promotor Score but not dominantly and the direction of the relationship is inconclusive i.e. does negative experience with parking decrease Net Promotor Score or does a poor regard of DTLB influence rating of the parking experience?

The reason for preferring another city hub was compared between Detractors v. Promotor & Passives. It was thought that perhaps the Detractors had a specific desire for a city hub that was duly missing in DTLB. However, no significant difference was observed between the two groups given the size of the segmentations. No specific trends were observed amongst the alternative "Other" answers.

Figure 17. Comparison of Reason for Alternative Preference

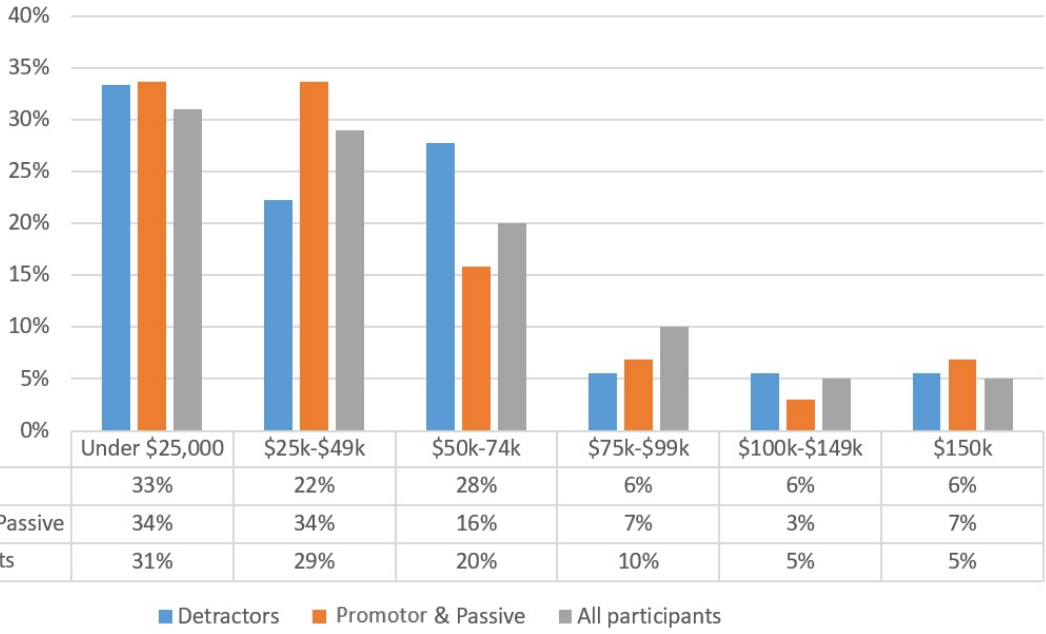


A small but statistically significant positive correlation was observed between Net Promotor Score and number of visits to retail/entertainment locations whereby participants of lower Net Promotor Scores tended to visit retail and entertainment locations less frequently. Given the correlational nature of this analysis, it is uncertain as to whether this relationship is reflective of low regard of DTLB causing less visits by participants to these locations, or if low visits by participants and their consequent unfamiliarity of what DTLB has to offer caused them to give a lower Net Promotor Score. Further analysis is necessary to distinguish the direction of this relationship.

Number of analysis that looked for interactions between different variables were implemented. For example, income distribution of the Workers who promoted or were passive towards DTLB in 2016 was compared with that of Workers of 2016 who gave an unfavorable score to see if an interaction between income and Worker classification perhaps existed that resulted in different scores. Neither income or classification have an impact on scores but a participant who is both a Worker and earning less income could potentially have a characteristically low regard.

As observed in the chart below, no such relationship was found. The chart shows the income distribution of Detractors v. Promotors & Passives which shows a very similar composition. Other tests for interaction yielded similar results.

Figure 18. Worker Income Distribution 2016: Detractor v. Promotor & Passive



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

NET PROMOTOR SCORE ON USE OF DTLB

A statistically significant correlation exists between Net Promotor Scores and the monthly visits of Workers and Residents to restaurants, entertainment, and retail. Workers and Residents of higher Net Promotor Scores frequented restaurants, entertainment and retail destinations of DTLB more commonly than Workers and Residents who gave a lower Net Promotor Score. The correlation was small for Residents and strong for the Workers, meaning a Worker with a high Net Promotor Score is more likely to attend DTLB businesses than a Resident with a high Net Promotor Score. The relationship observed likely exists with Visitors and Detractors but failed to be detected quantitatively due to the small range in visitation numbers which was framed on a monthly basis. It is likely that if the time frame was increased to a year, a greater range in visitation answers would be observed and a correlation would surface.

The weaker correlation observed with Residents is likely due to their proximity to DTLB. Residents' regard for DTLB does impact the frequency of their patronage but the close proximity and consequent convenience of DTLB results in Residents frequenting DTLB even when their regard is lower. On the other hand, Worker's behaviors are much more related to their regard of DTLB due to the smaller window of time they are within DTLB and therefore DTLB's diminished level of convenience compared to Residents. A correlation between Net Promotor Score and number of visits likely exists within Visitors and Tourists but was not detected due to the very limited range in monthly visits.

ACTIONS IN DTLB

The survey instrument included a final set of questions targeted at identifying how frequently respondents visited DTLB, the purpose for those visits, and how much they typically spent during those visits. This data was collected through two main sets of questions. The first sought to identify frequency of visits and the second sought to identify spending by location.

Two important assumptions were made in the analysis of this data. In calculating the frequency of visits, the survey instrument was designed to be open-ended, allowing for as much accuracy as possible. If an answer was provided, the specific count of visits was recorded. Many respondents, however, found it difficult to provide an estimate. Rather than have respondents decline, survey staff were instructed to offer prompts in the format of Once, A few times, More than 5, and so on. The vast majority of respondents defaulted into those categories. Second, the baseline frequency question was deliberately skipped for Residents and Workers who are present in DTLB daily. To minimize the distortive effect of having Residents and Workers having daily spending events, the maximum number of monthly spending events was capped at 10.

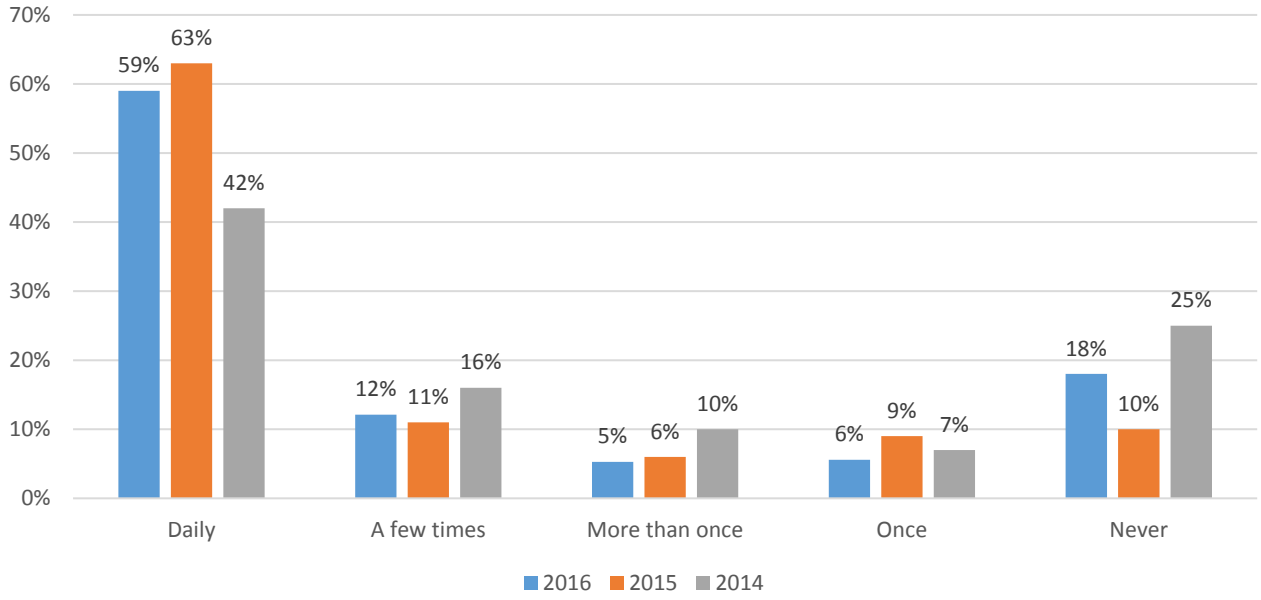
The second set of questions sought to identify the daily spending and where that spending occurred. This analysis was sensitive to distortion from two different factors. First, an individual with a large number of spending events, even if most of them are small, could substantially affect the total sample if that particular day they made a substantial purchase. To account for that potential, the data set was manually reviewed to look for problematic outliers. No data point was deemed so egregious as to warrant adjustment.

Second, because the survey was stratified by time of day, not all respondents had spent an equivalent amount of time in a given day. That is, a respondent surveyed at 2:00 PM (the end of the earliest shift) would have had a substantially shorter day to report than a respondent surveyed at 7:00 PM. This stratification was necessary, however, to ensure not only a representative sample but to collect spending data from a range of Visitors to DTLB (e.g. the spending profile of a Worker could be quite different from that of a bar hopper).

RESPONDENT FREQUENCY OF VISITS PER MONTH

The substantial plurality of Visitors to DTLB are individuals who visit daily as either Residents or Workers.

Figure 19. Monthly DTLB Visits: 2016 ~ 2014



A statistically significant difference was observed whereby participants of 2016 were more likely to visit DTLB more frequently than participants of 2014, and participants of 2015 were more likely to visit DTLB than their 2014 counterparts. The size of the difference was small to medium in both counts. The difference is largely attributable to the greater number of Residents and Workers that were counted within DTLB in 2015 and 2016.

The difference in frequency of visits was also compared in 2016 v. 2015 and a significant difference was observed whereby DTLB participants of 2015 are more likely to have visited DTLB more frequently than customers of 2016. However, the size of the difference was small.

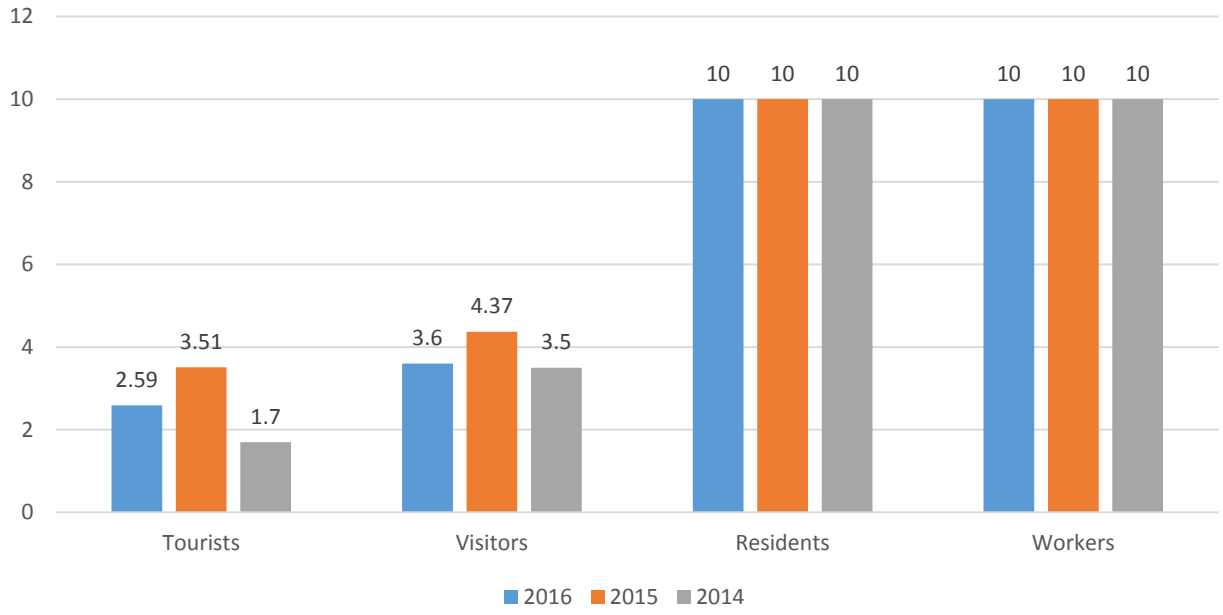
The visits were cross tabulated by survey classification to identify trends across the sub-populations. The key findings reinforce intuition.

RESPONDENT MONTHLY VISITS

The frequency of visit distributions was used to develop a monthly number of predicted visits. Developing a number of visits over a fixed period of time is an important step in understanding the overall economic impact of a given population segment. For example, Tourists might spend more on entertainment businesses than Residents during any one visit. However, Residents are present in DTLB so much more frequently that their net spending at entertainment businesses is larger than that of Tourists. In shaping economic development policy, it is important to understand not only the likely spending per visit, but the aggregate spending over time.

The monthly visits were calculated by aggregating the total reported visits from Question 8, adding one to account for the day of the interview, and dividing by the population size. The trends observed in the segmentation followed the overall trend identified from year to year, meaning that the classification does not have a particular impact.

Figure 20. Average Number of Monthly Visits to DTLB per Classification: 2016 ~2014



RESPONDENT LIKELIHOOD OF VISIT TO A PARTICULAR BUSINESS

With the number of visits calculated, the likelihood that a pedestrian visited a given business type during one of those visits was calculated. The total number of visits to a particular business type were summed and divided by total visits to DTLB (which equals the sample size population). For smaller population segments, the total number of visits to a particular business type by that segment were summed and divided by the total visits to DTLB by that segment (which equals the sample size of the population segment). This methodology takes into consideration the random occurrence that a given pedestrian visits more than one business of a given type on a single visit.

A statistically significant increase was observed whereby participants of 2015 more frequently visited retail locations than participants of 2014. However, a statistically significant decrease was observed in comparison of 2016 v. 2015 retail visit scores whereby customers visited retail locations less in 2016 v. 2015. The size of the difference in both accounts were small. The differences observed in 2016 v. 2014 were not statistically significant.

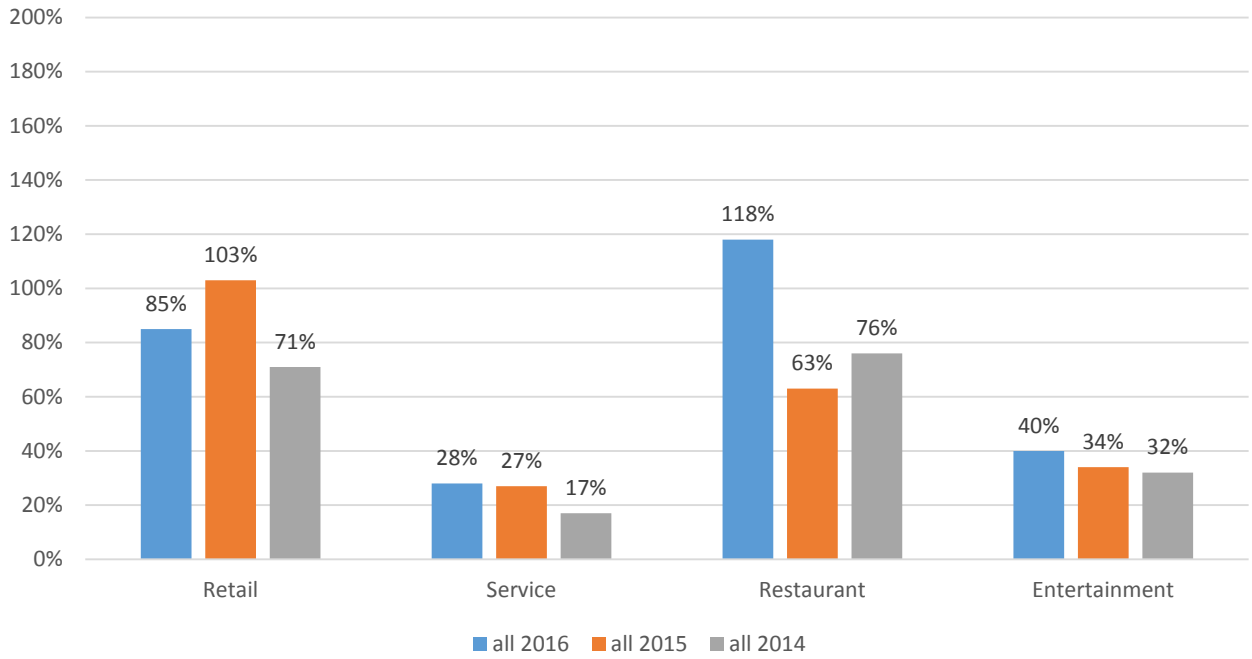
Although the number of participants who visited service businesses increased in both 2016 and 2015 compared to 2014, the difference was too small to deem statistical significance.

A statistically significant decrease was observed whereby participants of 2015 less frequently visited restaurant locations within DTLB when compared with participants of 2014. However, the size of the

difference was very small. A statistically significant increase was observed in 2015 v. 2016 whereby customers of DTLB were more likely to use a restaurant in 2016 than in 2014. A statistically significant difference was not established between the numbers observed in 2015 v. 2014.

A statistically significant difference was not observed in the number of visits to entertainment venues between the three years of the study.

Figure 21. Likelihood of Visit by Business Type: 2016 ~2014



Trends observed in the past two years were observed once again this year:

- Residents and Workers are the primary patrons of service businesses;
- Visitors are the primary patrons of entertainment businesses despite most pedestrians citing "better entertainment" as a key reason for preferring a different downtown area;
- Number of Tourists sampled remains too small to discuss trends observed; and
- Tourists' visit to retail has increased to surpass that of Residents' likelihood of visit this year. However, given the sample sizes involved, which group is larger remains unclear.

Figure 22. Likelihood of Visitors Frequenting a Business by Type: 2016 ~2014

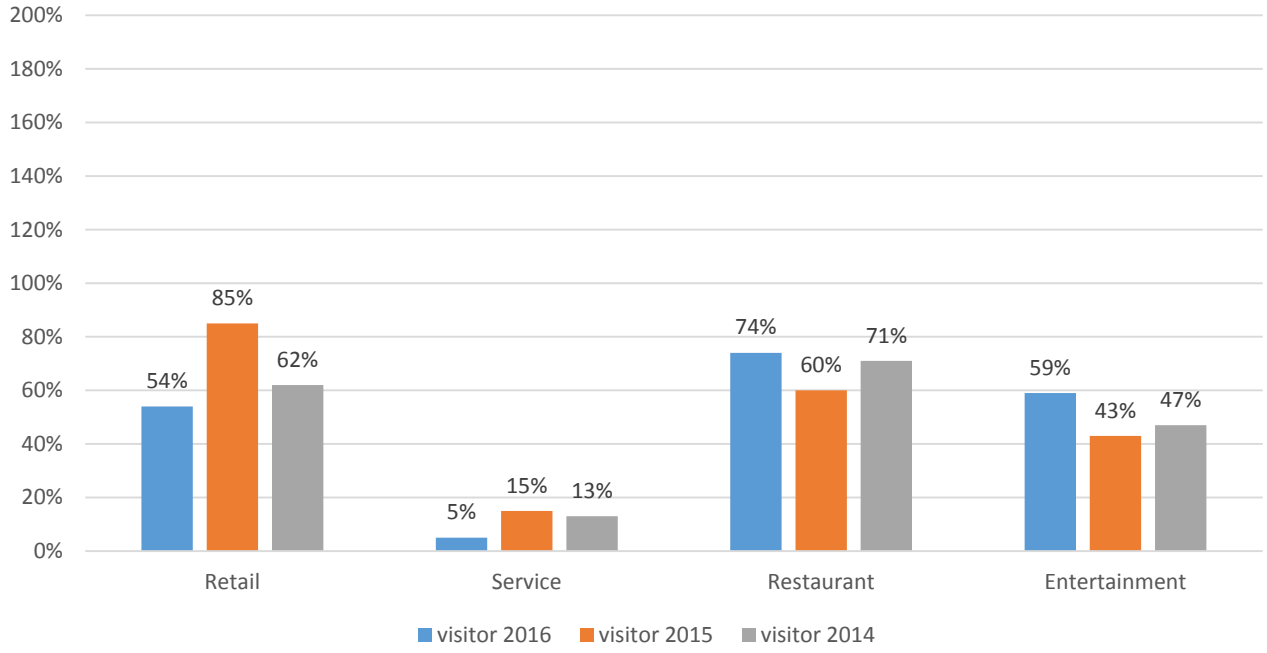


Figure 23. Resident Likelihood of Visit by Business Type: 2016 ~2014

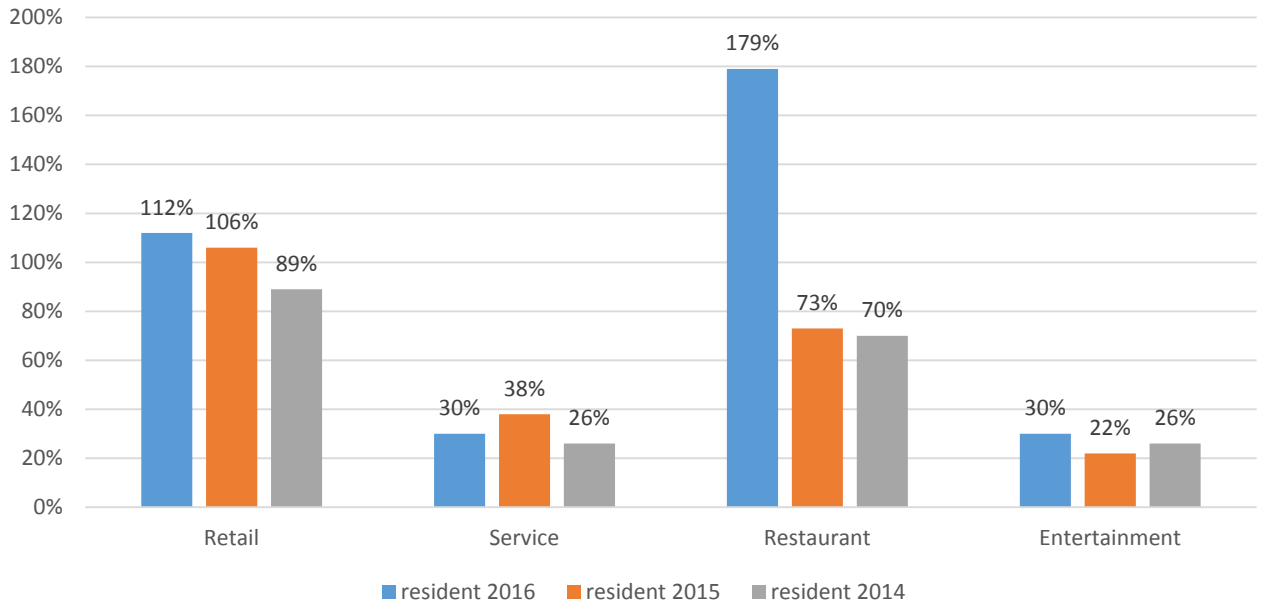


Figure 24. Worker Likelihood of Visit by Business Type: 2016 ~2014

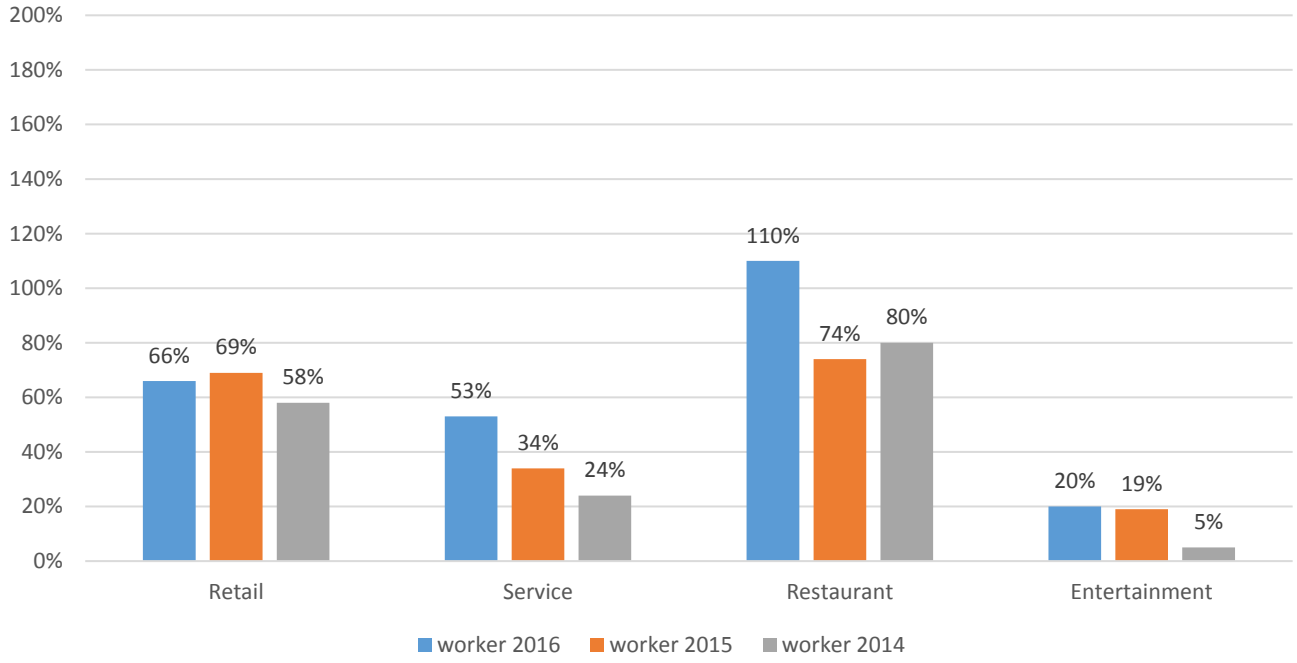
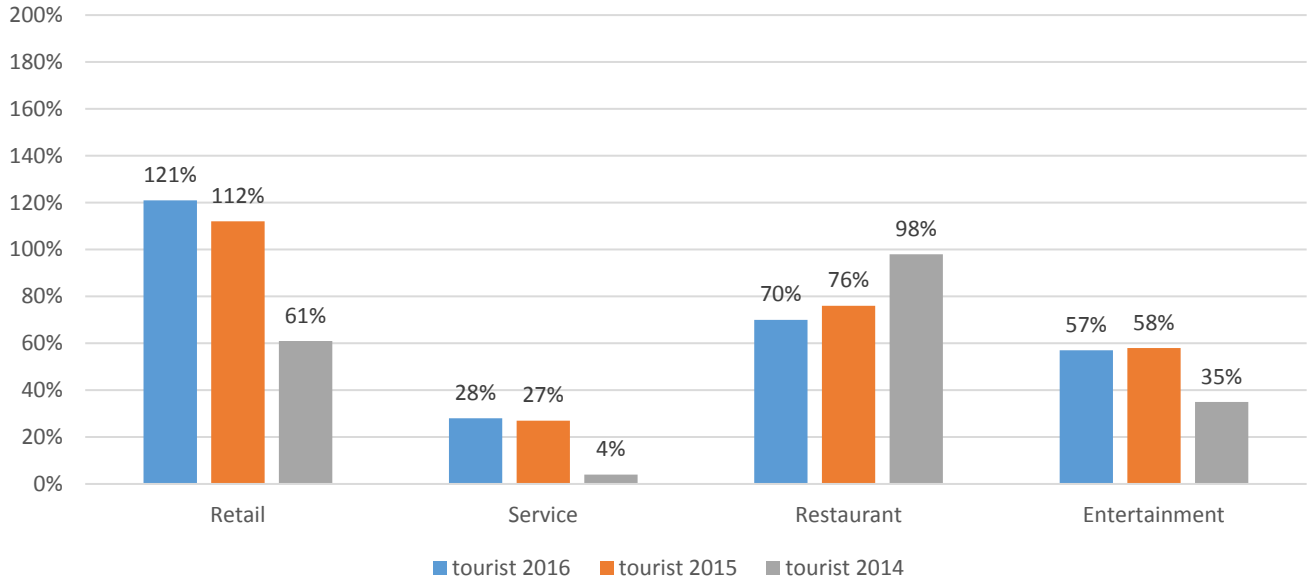


Figure 25. Tourist Likelihood of Visit by Business Type: 2016 ~2014



RESPONDENT TYPICAL SPEND

Respondents were asked about their spending behaviors. This question asked about spending behaviors on the survey day to increase the accuracy of the response. The spending behaviors were aggregated and averaged to produce a typical spend reflective of the typical visit to DTLB.

Through this analysis, population aggregate spending is avoided. Instead, percent distributions of spending are reported and spending for a typical individual is reported. Population aggregate reporting is avoided because it cannot be affirmed that the sample population has the same make-up of the general population of DTLB. During surveying of 2014, staff identified a lower response rate for Tourists therefore redirected surveying locations to locations where Tourists were more likely to be found to ensure a statistically significant number of Tourists. This practiced was continued in 2015 and 2016. Therefore, while the data is statistically significant with regards to Tourists and with regards to Residents, the data cannot, for example, say that the ratio of Tourists to Residents is accurate. As a result, any analysis that presumes the ratio of Tourists to Residents is accurate would be flawed.

Participants whose spending exceeded 3.5 standard deviations were excluded from the analysis as an outlier. Data from 2014 and 2015 was also standardized in this manner for comparisons.

Participants of 2015 were found to have spent more money at DTLB than their 2014 counterpart at a statistically significant level for all categories of businesses excluding restaurants. The size of the differences was small on the three accounts. A statistically significant difference was not observed between spending on restaurants of 2015 v. 2014.

No statistically significant difference was observed in a comparison between 2016 v. 2015 expenditure figures within retail, service, and restaurant business categories. A statistically significant difference was observed in the retail, service, and entertainment expenditures of 2016 v. 2014 whereby participants of 2016 spent more in these business categories. The size of the difference was small in terms of retail and service businesses while the size of the difference was medium for entertainment. Entertainment had a sizable and statistically significant increase in spending in 2016 v. 2015. The size of the difference was small to medium.

Table 17. Average Spending per Classification: 2016 ~ 2014

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

The following are segmentation of spending by both business and customer classification. Reliability of values and fluctuation observed should be attenuated as much of the segmentation is based on a low number of participants. For example, the average figure noted of Tourists' spending on service businesses is comprised of four participants.

Table 18. Average Spending per Visit at Business Type by Survey Classification: 2016

Category	Visitor	Resident	Worker	Tourist
Retail	$29.00	$8.92	$17.82	$30.04
Service	$5.00	$24.27	$4.80	$46.25
Restaurant	$5.00	$16.33	$17.20	$21.96
Entertainment	$38.82	$17.54	$55.00	$35.72

Table 19. Average Spending per Visit at Business Type by Survey Classification: 2015

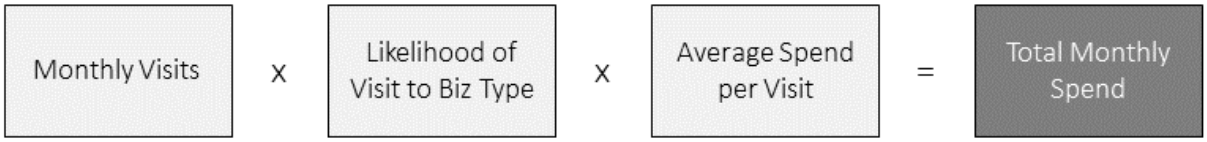
Category	Visitor	Resident	Worker	Tourist
Retail	$10.93	$21	$14.55	$19.39
Service	$4.12	$6.7	$5.34	$7.44
Restaurant	$10.23	$13.9	$12.83	$13.32
Entertainment	$9.04	$3.56	$2.55	$8.24

Table 20. Average Spending per Visit at Business Type by Survey Classification: 2014

Category	Visitor	Resident	Worker	Tourist
Retail	$43.00	$35.00	$39.00	$12.00
Service	$38.00	$28.00	$12.00	$35.00
Restaurant	$36.00	$33.00	$18.00	$28.00
Entertainment	$19.00	$12.00	$12.00	$15.00

RESPONDENT ECONOMIC IMPACT

A final analysis was done to calculate the aggregate economic impact of respondents. This analysis sought to take into consideration the frequency with which a pedestrian visits DTLB, the likelihood that a pedestrian visits a given type of business, and the typical spending at a typical business. The calculation utilizes the data discussed in the previous section following the formula below.



The findings vary substantially when segmented with the monthly visits multiplier. Because Residents and Workers have around 10 monthly visits, their aggregate economic impact is substantially more than that of a Tourist with approximately two monthly visits a year.

The data was cross tabulated by survey classification and the same calculation ran for each of the classification types. Those findings are aggregated in Table 36 and contrasted against the typical pedestrian spend.

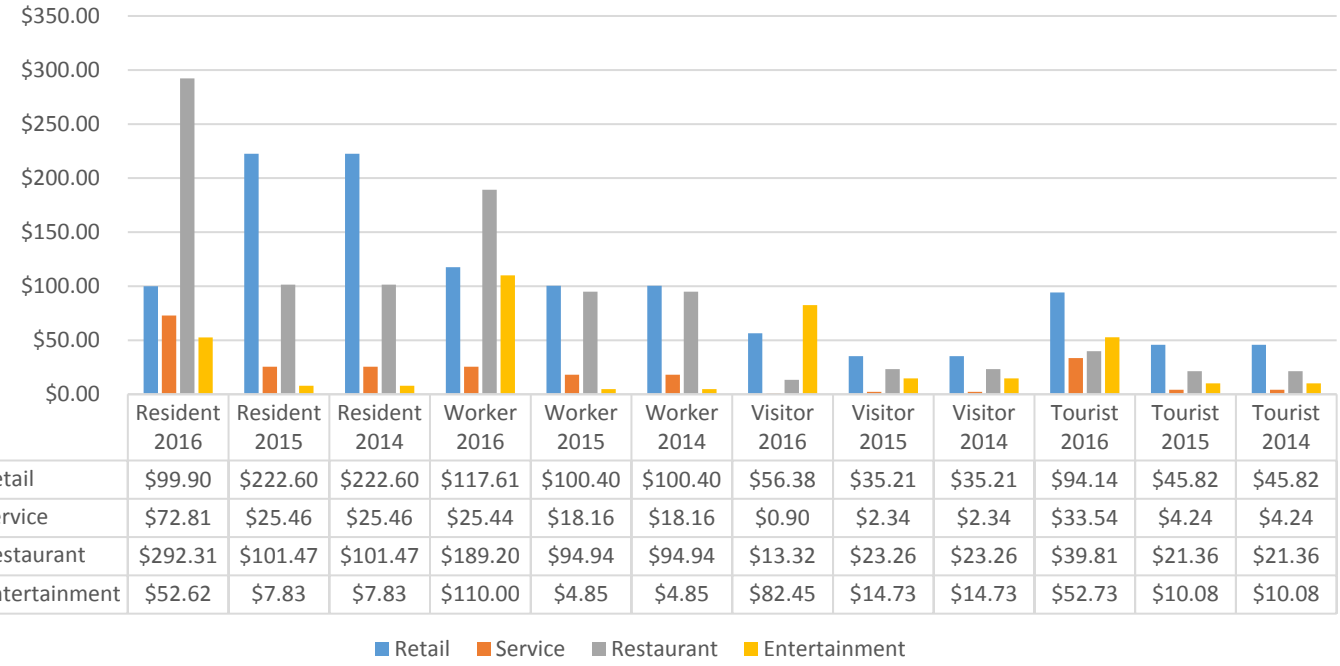
The data demonstrates that Residents have the highest monthly spending for all survey classification types in all categories excluding entertainment. Table 36 shows the typical monthly spending for a typical Resident. Although the values are higher due to the higher frequency of visits, the values are not distorted by the relative size of the Resident classification cohort. That is, in addition to spending more than other survey classifications, Residents are also the largest population encountered in DTLB, further increasing their economic importance.

Workers have the second highest economic activity for retail, restaurant, and service businesses. This economic activity is predominantly driven by their number of monthly visits as Workers have below average spend at restaurants (e.g. mostly cheap lunches) and service businesses. Workers spent the least at entertainment businesses out of all classification.

Visitors, who average 3.79 visits per month, have a below average economic impact in all categories. Despite that, Visitors remain important contributors to all business types with an emphasis on entertainment businesses. This is driven by a higher average spend per visit and visiting entertainment businesses nearly twice as often.

The average Tourist does not contribute substantially to DTLB's economic impact over a monthly window. Although Tourists as a population may aggregate to be an important driver of economic activity, the data is unable to make statistically significant assertions at that population level. That said, the difficulty with which survey staff had in finding Tourists suggests that they are, if anything, an even smaller percentage of the overall pedestrian population than represented here. Were that true, the economic impact of Residents, Workers, and Visitors would eclipse Tourists even more than reported in these findings.

Figure 26. Monthly Spending per Classification: 2016 ~ 2014



	Resident 2016	Resident 2015	Resident 2014	Worker 2016	Worker 2015	Worker 2014	Visitor 2016	Visitor 2015	Visitor 2014	Tourist 2016	Tourist 2015	Tourist 2014
Retail	$99.90	$222.60	$222.60	$117.61	$100.40	$100.40	$56.38	$35.21	$35.21	$94.14	$45.82	$45.82
Service	$72.81	$25.46	$25.46	$25.44	$18.16	$18.16	$0.90	$2.34	$2.34	$33.54	$4.24	$4.24
Restaurant	$292.31	$101.47	$101.47	$189.20	$94.94	$94.94	$13.32	$23.26	$23.26	$39.81	$21.36	$21.36
Entertainment	$52.62	$7.83	$7.83	$110.00	$4.85	$4.85	$82.45	$14.73	$14.73	$52.73	$10.08	$10.08

Table 21. Typical Pedestrian Monthly Spending by Survey Classification: 2016

Category	Resident Spend	Worker Spend	Visitor Spend	Tourist Spend
Retail	$99.90	$117.61	$56.38	$94.14
Service	$72.81	$25.44	$0.90	$33.54
Restaurant	$292.31	$189.20	$13.32	$39.81
Entertainment	$52.62	$110.00	$82.45	$52.73
TOTAL	$517.64	$442.25	$153.05	$220.22

Table 22. Typical Pedestrian Monthly Spending by Survey Classification: 2015

Category	Resident Spend	Worker Spend	Visitor Spend	Tourist Spend
Retail	$222.60	$100.40	$35.21	$45.82
Service	$25.46	$18.16	$2.34	$4.24
Restaurant	$101.47	$94.94	$23.26	$21.36
Entertainment	$7.83	$4.85	$14.73	$10.08
TOTAL	$357.36	$218.35	$75.54	$81.50

Table 23. Typical Pedestrian Monthly Spending by Survey Classification: 2014

Category	Resident Spend	Worker Spend	Visitor Spend	Tourist Spend
Retail	$222.60	$100.40	$35.21	$45.82
Service	$25.46	$18.16	$2.34	$4.24
Restaurant	$101.47	$94.94	$23.26	$21.36
Entertainment	$7.83	$4.85	$14.73	$10.08
TOTAL	$357.36	$218.35	$75.54	$81.50

GOING FORWARD

Workers constitute a large portion of DTLB revenue. Workers have placed in the top positions both in terms of number of monthly visits as well as expenditure for the past three years. However, regard of DTLB by Workers have seen a decline in 2016 with a sizable number of Workers being categorized as Detractors relative to other classifications.

Unlike Residents (the other dominant spending group), Workers' spending behavior is significantly more sensitive to their regard of DTLB as the convenience of DTLB's proximity is less present for the Workers. Residents spend the majority of their free time within DTLB, meaning the proximity and consequent convenience of businesses of DTLB is larger compared to Workers who spend a fraction of their free time within DTLB.

Within the time frames where the convenience of proximity is present for Workers, such as lunch and dinner, the data suggests that Workers who regard DTLB less favorably are more frequently choosing alternatives to utilizing the amenities of DTLB such as bringing lunch from home rather than eating at a restaurant or traveling to a different city hub rather than staying in DTLB during afterhours. The potential for economic growth in DTLB is readily present within this classification and their physical presence within DTLB makes them a more cost efficient and easily targetable group to advertise relative to the Tourists or Visitors.

A number of analyses were performed to obtain characteristics that distinguished Detracting Workers from promoting Workers (as well as Detractors in general) that could give insights into the specific needs and desires of this group-- which included but were not limited to a comparison of income, reason for preference of another city and age-- but no distinguishing characteristic or interactions of these factors were observed. Causal factors of the Promotor/Detractor discrepancies exist but are not captured within the questions of the longitudinal study which predominantly revolves around charting economic growth and understanding demographical trends.

Future longitudinal studies should continue with the line of inquiry established in the current series of surveys in order to continue charting progress of DTLB's growth and to gauge the impact of DLBA's actions. However, a complementary study designed specifically to better understand the basis of customer's perspective should also be implemented with questions pertaining to:

- A closer look at the image of DTLB as a destination of leisure, a place of cultural identity, a community;
- Investigate a potential short run cost in customer satisfaction stemming from construction in the area and investigation into ways of mitigating the dissatisfaction through messaging if present;
- Measure customer's knowledge of the amenities available in DTLB in order to understand if Detractor scores are based on lack of information rather than due to a dearth in amenities
- Measure customer's exposure to current and past DTLB advertisements to gauge and improve upon advertisement design, placement, and medium
- A look into the hobbies, interests, and tastes of DTLB customers.

SURVEY INSTRUMENT

*Date*_____ *Shift*_____ *Surveyor Name*_____

[Surveyor to read anything in bold]

Good xx (morning, afternoon, evening depending on time of the day). I'm here on behalf of the Downtown Long Beach business improvement district. We're collecting feedback from people to understand development opportunities for the Downtown area.

Are you available to take a short 5-minute survey? We will give you a $5 gift card to Starbucks to thank you for your time.

Identification Question

1. **What brings you to Downtown Long Beach today – are you a Resident? Do you work here? Are you a Visitor? Or a Tourist (not from SoCal)? It's fine if you're more than one.**
   - ○ Resident
   - ○ Worker
   - ○ Visitor *(defined as anyone coming from outside Downtown Long Beach but within Southern California – defined to be between, and including, Santa Barbara and San Diego: Counties of Santa Barbara, Ventura, LA, San Bernardino, Riverside, Orange, and San Diego)*
   - ○ Tourist *(defined as anyone coming from out of Southern California)*

Net Promoter Score (Baseline) Question

2. **Based on your overall experience in Downtown Long Beach today, how likely is it that you would recommend a visit here to your friend or colleague? (On a scale of 0 to 10, with 0 being not at all and 10 being definitely?)**

Placemaking Questions

3. **How did you get here today?**
   a. Walked
   b. Drove
   c. Took public transit
   d. Biked
   e. Other: specify _____

[Skip to #5 if they did NOT drive or bike]

4. How would you rate your parking experience here today? (On a scale of 0 to 10, with 0 being difficult and 10 being easy)

5. Is there another Southern California downtown area that you prefer over Long Beach for entertainment, shopping or eating out? *[Yes or No]*

   5a. If so, what city's?

[Skip Q6 if Q5 answer = NO]

6. Which of these four reasons makes [city from Q5]'s downtown preferable to Long Beach?
   a. Better shopping [retail]
   b. Better services [services]
   c. Better places to eat or drink [eating out]
   d. Better entertainment and attractions [entertainment]
   e. Other _____
   [only write in other field if respondent offers another explanation, do not prompt for answers outside of the 4 reasons]

7. If you could pick one business that you wish was in Downtown Long Beach, what would it be?

Economic Activity Questions

[Skip Q8 and go to Q9 if subject is Worker or Resident]

8. Besides today, in the past month, how many visits have you made to Downtown Long Beach?
   [Surveyor to leave open ended. If respondents struggle to answer, surveyors provide a few prompts like 'once', 'a few times', 'more than 5', etc.]

9. Of those visits here in the past month, how many visits were for entertainment, shopping, or eating out? *[must provide exact number]*

10. Now I'm going to ask you some questions about your spending habits in Downtown Long Beach. It'll be completely anonymous.

    A. How many times did you visit a _____ today? [provide examples]
    B. [Skip if A = 0] And how much money did you spend on average, per visit, at that/those _____ (s) today?

[Surveyor to ask Q10.A and Q10.B for each of the four categories below; Surveyor is free to elaborate on how each category is defined and provide examples of the categories]

	10.A # of visits today	10.B $ amt spent/visit today
1. Retail location		
2. Service business		
3. Restaurant/café/bar		
4. Place of Entertainment or Local Attraction		

Demographic questions

11. *[Record gender of subject - do not ask]*

Now I'm going to collect some demographic information. We are not collecting names, so whatever you provide will be anonymous.

12. Which of the following age ranges do you belong to?
    a. <18
    b. 18-24
    c. 25-44
    d. 45-64
    e. 65+

13. What zip code do you live in?

14. Final question and then I'll give you your gift card! What is your household income? Again, the information you provide is completely anonymous.

[prompt with following ranges; can let them pick it and submit it on the tablet]

a. Under $25,000

b. $25k-$49k

c. $50k-$74k

d. $75k-$99k

e. $100k-$149k

f. $150k+