S.GRONER ASSOCIATES, INC.

Downtown Long Beach Associates

User Intercept Survey Report

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EXECUTIVE SUMMARY

DLBA conducted a pedestrian intercept survey in autumn 2014 to better understand the demographic and behavioral trends of the various user groups in Downtown Long Beach. This was the first of three planned surveys to track progress over time. Results of the survey will be used for future economic development and public realm programming. A total of 322 pedestrian responses were collected at 10 different survey locations across DTLB. The survey has a population level margin of error of ±5.5%.

The data collected was segmented by key demographic classifications. The most important classifications were age, income, and reason for visiting DTLB. Reasons within this final classification were defined as Resident (lives in DTLB), Worker (works in DTLB but may live elsewhere), Visitor (lives outside of DTLB but within Southern California), and Tourist (lives outside of Southern California).

Behavioral data was also collected. Pedestrians were asked if they had a preference for a different downtown area in Southern California and if so, why. Only 41% of pedestrians preferred a different downtown area with Los Angeles, Santa Monica, and San Diego being the most frequent. Pedestrians were asked for their likelihood to recommend DTLB, which was used to develop a Net Promoter Score (+49 on a scale of -100 to +100). Finally, pedestrians were asked what types of businesses they visited and their spending habits at those businesses. Spending ranged from a low of $16 at entertainment businesses to a high of $35 at retail businesses. The behavioral and demographic data were used to develop six profiles of economic spending behavior:

Loyal Locals • Residents earning less than $50,000 • Make most of their purchases in DTLB • Lots of smaller purchases that aggregate to a big economic impact	**Resident Champions** • Residents who are "Promoters" of DTLB • Substantially more likely to be male • Earn more & spend more than typical Residents especially at retail businesses
Volume Visitors • Visitors earning less than $50,000 • Substantially younger than the average pedestrian and frequent visitors to DTLB • Strong spenders across business types	**Golden Guests** • Visitors earning more than $50,000 • Prefer a Santa Monica or San Diego experience but keep coming back to DTLB • Have the means to go elsewhere; a good gauge for how well DTLB attracts outsiders
Typical Tourist • All tourists included because they are not a large portion of pedestrian population • Tend to be older and more affluent • Not big spends and few repeat visitors	**Wealthy Workers** • Workers earning more than $50,000 • Substantially older than other profiles • Least engaged with DTLB • Relatively low spenders with most spending at restaurants (e.g. lunch crowd)

From the economic profiles and other behavioral data, three core insights were made:

1. **Provide an Authentic Long Beach Experience**. The biggest spenders are the segments who choose to live in DTLB or choose to visit frequently (e.g. Residents and Visitors of all types).
2. **Expand the Fan Club**. Increasing the number of monthly visits is a driver of total spending. Visitors are an apt audience to increase monthly visits and, ideally, bring new visitors with them.
3. **Understand the Gaps**. Some audiences are either already captive (e.g. Wealthy Workers) or not big spenders (e.g. Typical Tourists) and their relationship with DTLB should be considered in designing any outreach efforts.

AT A GLANCE

** Survey results include 13 Resident-Workers, included in both counts*

	All	Resident	Worker	Visitor	Tourist
SURVEY OVERVIEW					
Pedestrians Approached	1185				
Pedestrians Surveyed	325	27% response rate			
Surveys Completed	322	99% completion			
DEMOGRAPHICS		*	*		
Female	177	57	31	68	29
Male	145	58	24	51	17
Mean Age (in years)	30.8	31.7	32.7	27.5	34.4
<18	18	5	0	11	2
18-24	35	15	4	14	3
25-44	86	32	18	27	13
45-64	23	8	3	5	7
65+	1	1	0	0	0
Declined to answer	159	54	30	62	21
INCOME		*	*		
Mean Income (in thousands)	$58.6	$57.1	$60.7	$55.2	$66.1
Under $25,000	107	42	24	36	13
$25-$49,000	61	21	9	26	6
$50-$74,000	60	21	3	25	11
$75-$99,000	33	7	5	18	5
$100-$149,000	37	13	8	11	7
$150,000+	22	9	6	3	4
Declined to answer	2	2	0	0	0
TRANSPORTATION		*	*		
Walked	86	60	8	4	20
Drove	156	26	32	85	17
Public Transit	63	18	13	24	9
Biked	15	9	2	6	0
PERCEPTION OF DOWNTOWN LONG BEACH		*	*		
Net Promoter Score (-100 to +100)	+49	+53	+42	+53	+35
Avg Net Promoter response value (0 to 10)	8.6	8.8	8.5	8.8	8.2

	All	Resident	Worker	Visitor	Tourist
PREFERENCE FOR OTHER DOWNTOWN AREA		*	*		
Yes	41%	44%	49%	36%	41%
No	59%	56%	41%	64%	59%
Given preference, is it because of…		*	*		
Retail	42%	49%	48%	42%	26%
Services	19%	29%	22%	16%	5%
Restaurants	49%	61%	44%	49%	26%
Entertainment	56%	75%	59%	44%	47%
FREQUENCY OF VISIT BY COUNT		*	*		
Daily	136	104	44	0	0
A few times	50	3	0	43	4
More than once	32	4	2	23	3
Once	21	0	0	16	5
Never	79	4	9	34	33
Declined to answer	4	0	0	3	1
TOTAL MONTHLY VISITS		*	*		
Total monthly visits to DTLB	6.6	10.6	10.1	3.5	1.7
Percent visits to business type by classification		*	*		
Retail	71%	89%	58%	62%	61%
Restaurants	76%	70%	80%	71%	98%
Services	17%	26%	24%	13%	4%
Entertainment	32%	26%	5%	47%	35%
Typical spend per business type		*	*		
Retail	$35	$35	$39	$43	$12
Restaurants	$31	$33	$18	$36	$28
Services	$28	$28	$12	$38	$35
Entertainment	$16	$12	$12	$19	$15
Typical monthly spend per business type					
Retail	$163	$330	$227	$94	$12
Restaurants	$154	$245	$149	$88	$48
Services	$31	$78	$28	$17	$3
Entertainment	$34	$34	$6	$31	$9
TOTAL MONTHLY SPEND	$382	$687	$410	$229	$72

BACKGROUND

PURPOSE

Downtown Long Beach Associates (DLBA) commissioned a pedestrian intercept survey from S. Groner Associates, Inc. (SGA). The purpose of the survey is to better understand the manner and extent to which visitors use the areas of Downtown Long Beach. The results of the survey will be used to develop future economic development and public realm programming.

This intercept survey is the first of a three year effort that will also seek to track changes over time in the pedestrian responses. These changes will be used to further refine and demonstrate the success of economic development initiatives.

In addition to understanding the demographic, economic, and behavioral perspectives of visitors to Downtown Long Beach, DLBA is seeking to understand the larger narratives that embody the Downtown Long Beach experience. These narratives will be transformed into a media fact sheet to best communicate the important findings.

METHODOLOGY

The survey was conducted from October 20 through November 16, 2014. In order to achieve a representative sample of visitors to Downtown Long Beach (DTLB), all data was collected before the Thanksgiving holiday to avoid the introduction of anomalous factors to the sample. Also, the survey collection times and dates were stratified by both day of the week and time of day. A total of 11 four-hour shifts were identified, as shown below.

SHIFTS	Weekday (Tues-Thurs)	Friday	Saturday	Sunday
Morning	10:00-2:00	10:00-2:00	9:00-1:00	10:00-2:00
Afternoon	4:00-8:00	2:00-6:00	1:00-5:00	3:00-7:00
Evening		6:00-10:00	5:00-9:00	
Late Night			9:00-1:00	

In addition to segmenting by survey time, a range of survey locations were also identified to ensure a representative distribution of pedestrians visiting the area. That is, Tourist pedestrians were more likely to be encountered near the Pike and Waterfront area, Workers near the Courthouse, and Residents near East Village.

A total of 10 survey locations were identified. Survey staff reviewed respondents by classification type and assigned additional shifts in zones to ensure adequate sample size of underrepresented classifications (e.g. additional shifts were scheduled near the Pike and Waterfront because Tourists were underrepresented at other survey sites). The complete set of sites is shown below, and they are represented graphically on the map on pg. 8. While all shifts began at set starting points, surveyors were permitted and encouraged to move within location region boundaries to obtain responses.

1. The Pike (north of Shoreline Drive)
2. Convention Center

3. Waterfront, Aquarium
4. East Village (1st/Linden)
5. Promenade/Broadway
6. Pine/1st
7. Pine/Broadway
8. Courthouse (Magnolia/Broadway)
9. Ocean Blvd West
10. Pine/6th (Molina)

Survey staff were trained to approach all pedestrians with the same script. Survey staff were not allowed to "pick and choose" who they wanted to approach, thereby removing visual bias from the sampling result. Survey staff completed the survey on tablets with data validation tools in place to ensure data accuracy. The final data was scrubbed to standardize entry and correct typographical entry errors.

MARGIN OF ERROR

The study has a sample size of 322 respondents resulting in a ±5.5% margin of error at the 95% confidence interval. A significant number of respondents declined to respond when asked to provide their age. As a result, the sample size for age dependent questions is 163 with a margin of error of ±7.7% at the 95% confidence interval.

The study segments the respondents into a range of classifications with the most significant being the respondents' relationship to DTLB. The classifications are 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 46 resulting in a margin of error of ±14.4% at the 95% confidence interval. A table of margins of error by classification type is below.

All results reported are statistically significant at the 95% confidence interval.

	Resident	Worker	Visitor	Tourist
Sample Size	115	55	119	46
Margin of Error	9.1%	13.2%	9.0%	14.4%

DEFINITION OF DOWNTOWN LONG BEACH

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

DETAILED FINDINGS

This section provides the detailed findings of the survey instrument. While the questions in the survey instrument were organized for ease of execution in the field, the findings here are organized into relational bundles that consider different aspects of a visitor's relationship with DTLB.

The sections are Demographics, Getting to DTLB, Feelings about DTLB, and Actions in DTLB. Each section is discussed in turn and collectively provide detailed findings on every question in the survey instrument. The results are first examined at the population level before examining significant cross tabulations of the survey findings by key segments.

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 reported.

The goal of the survey was to reach 300 respondents. This goal was surpassed by 8%. The survey had an overall response rate of 27%.

Table 1. Summary of Pedestrian Survey Activity

Population	Count	Rate
Pedestrians Approached	1185	--
Pedestrians Surveyed	325	27% response rate
Surveys Completed	322	99% completion

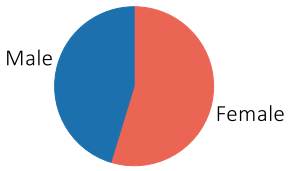
RESPONDENT GENDER

The survey population was slightly more female than male at 55%. This variance is greater than the census estimate for Long Beach (at 51% female) but in line with similarly situated pedestrian intercept surveys of downtown areas (such as the 2013 Downtown Los Angeles pedestrian survey which found 53% female respondents).

The higher rate of female respondents could be due to an actual disproportionate amount of females in the DTLB, an increased willingness to take the survey, stronger motivation from the incentive, or chance.

Table 2. Distribution of Respondent Gender

Gender	Count	Rate
Female	177	55%
Male	145	45%



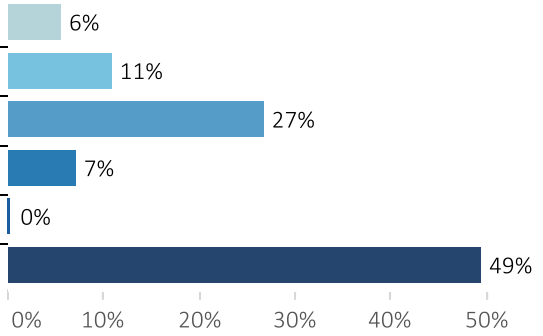
RESPONDENT AGE

The age of respondents was also collected with a median reported age of 30.8 for all visitors to DTLB. This finding is exactly equal to the median age reported in the Downtown Long Beach Economic Profile 2014. A significant number of respondents, nearly half, declined to provide their age. This increased the margin of error for age-based findings to 7.7% from 5.5% for the study as a whole.

Ages are reported by bracket below. The largest reported bracket is the 25-44 year old demographic with a strong left-leaning skew. This left skew reflects a younger overall demographic. Anecdotally, survey staff found that individuals who declined to provide their age tended to be older, suggesting the potential for a more standard distribution of ages.

Table 3. Distribution of Respondent Age

Age Bracket	Count	Rate
Under 18	18	6%
18-24	35	11%
25-44	86	27%
45-64	23	7%
65+	1	0%
Declined to give age	159	49%



The age brackets do not vary significantly by gender with two exceptions. First, those aged 45-65 are substantially more likely to be female. Second, those who declined to provide an age are substantially more likely to be female.

Table 4. Distribution of Respondent Age by Gender

Age Bracket	Male	Female
Under 18	8	10
18-24	18	17
25-44	43	43
45-64	9	14
65+	1	0
Declined to give age	66	93

RESPONDENT CLASSIFICATION

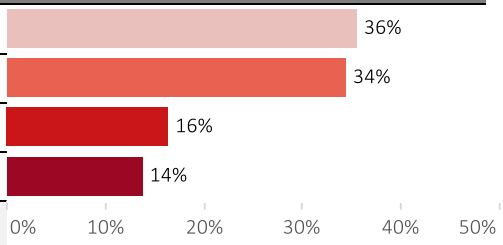
An important segmentation throughout the analysis was the relationship between the respondent and DTLB or the "why" of what brought them to Downtown Long Beach. Four classifications were identified: Resident, Worker, Visitor, and Tourist. Each is defined below.

- 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 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.

A total of 13 respondents qualified as both Residents and Workers. They are included in each classification.

Table 5. Distribution of Respondent Classification

Classification	Count	Rate
Visitor	119	36%
Resident	115	34%
Worker	55	16%
Tourist	46	14%
TOTAL	335	



* Total includes 13 Resident/Workers

The Worker and Visitor respondent classifications follow the identified gender variance closely. The Resident classification has an even gender split while the Tourist classification is strongly biased towards female.

Table 6. Distribution of Respondent Classification by Gender

Gender	Resident	Worker	Visitor	Tourist	TOTAL
Female	57	31	68	29	185*
Male	58	24	51	17	150*

Percentage					
Female	50%	56%	57%	63%	55%*
Male	50%	44%	43%	37%	45%*

* Includes 8 female Resident-Workers and 5 male Resident-Workers

The average age of each respondent classification differed significantly with Visitors to DTLB being 3.3 years younger and Tourists being 3.6 years older, on average, than the mean age of 30.8 for the pedestrian population as a whole.

Table 7. Respondent Age by Classification

Gender	Resident	Worker	Visitor	Tourist
Average Age	31.7	32.7	27.5	34.4

In examining the average ages for each classification by bracket, several key observations emerge. With regards to the youngest bracket, DTLB is a popular location for young Residents and Visitors. Comparatively, there were very few young Tourists and no young Workers. The low rate of young Tourists suggests fewer families visiting DTLB and the low rate of young Workers similarly suggests fewer families living nearby to DTLB whose teenage children would likely seek local employment. The array of what type of young people are drawn to DTLB (e.g. Residents and Visitors, but not Workers or Tourists) is significant in considering the type of amenities DTLB should provide to engage those pedestrians.

Table 8. Respondent Age by Classification and Age Bracket

Age	Resident	Worker	Visitor	Tourist
<18	13.2	--	14.4	14.0
18-24	20.3	21.5	20.9	22.3
25-44	33.0	32.3	32.2	29.7
45-64	53.4	50.0	49.4	54.1
65+	79.0	--	--	--
Declined	--	--	--	--

RESPONDENT INCOME

A key demographic trait surveyed was respondent income. More than 99% of all respondents provided income data with only 2 respondents declining out of 322 total respondents. Respondent income was reported in income brackets. 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 survey population as a whole has a mean income of $58,600. The numeric counts were broken across the different income brackets as delineated below.

Table 9. Respondent Income by Income Bracket

Income Bracket	Count	Rate
Under $25,000	107	33%
$25-$49,000	61	19%
$50-$74,000	60	19%
$75-$99,000	33	10%
$100-$149,000	37	11%
$150,000+	22	7%
Declined	2	1%
TOTAL	322	

Respondent income varied substantially by respondent classification. Visitors to DTLB had the lowest average income at $55,200 and Tourists had the highest average income at $66,100. Residents of DTLB had an average income of $57,100 which compares similarly to the $56,448 average income identified in the Downtown Long Beach Economic Profile 2014.

Table 10. Respondent Income by Income Bracket and Respondent Classification

Income Bracket	Visitor	Resident	Worker	Tourist
< $25,000	36	42	24	13
$25-$49,000	26	21	9	6
$50-$74,000	25	21	3	11
$75-$99,000	18	7	5	5
$100-$149,000	11	13	8	7
$150,000+	3	9	6	4
Declined		2		
AVERAGE INCOME	$55,200	$57,100	$60,700	$66,100

Income was similarly stratified by respondent age. Income for age brackets with sufficient sample sizes increased along with age from $35,900 to $75,600. This trend follows intuition. Respondents 18 years of age and below reported an abnormally high mean income at $44,700. However, in interpreting this result, the same size of 18 is below the threshold 20 for statistical significance. Similarly, because respondents were allowed to select their income bracket anonymously, it is possible that younger respondents deliberately skewed the data. Those who declined to provide an age have an income substantially similar to the overall mean income.

Table 11. Respondent Income by Income Bracket and Age

Income Bracket	<18	18-24	25-44	45-64	65+
< $25,000	5	22	27	4	
$25-$49,000	7	5	10	3	1
$50-$74,000	3	5	23	7	
$75-$99,000	3	1	6	3	
$100-$149,000		2	9	1	
$150,000+			11	5	
AVERAGE INCOME	$44,700	$35,900	$64,600	$75,600	$38,000

GETTING TO DTLB

The survey instrument included a series of questions related to how the respondent got to DTLB and, under select conditions, their experience accessing parking in DTLB. The respondents were provided with a selection of response options including Walked, Drove, Public Transit, Biked, and Other. Two respondents declined to answer and 20 respondents selected Other. The result was manually entered as a text field and, during analysis, reclassified into one of the four reported modes. Other responses included using Uber or a Taxi (reclassified as public transit), being given a ride (reclassified as Drove), and skateboarding (reclassified as Biked given their usage of bike lanes).

The vast majority of respondents Drove to DTLB. The second most common mode of travel was Walked, followed reasonably closely by Public Transit. A substantial minority of respondents Biked into DTLB even with 6 “skate” or “skateboard” results being classified as Biked. One likely explanation for this substantial

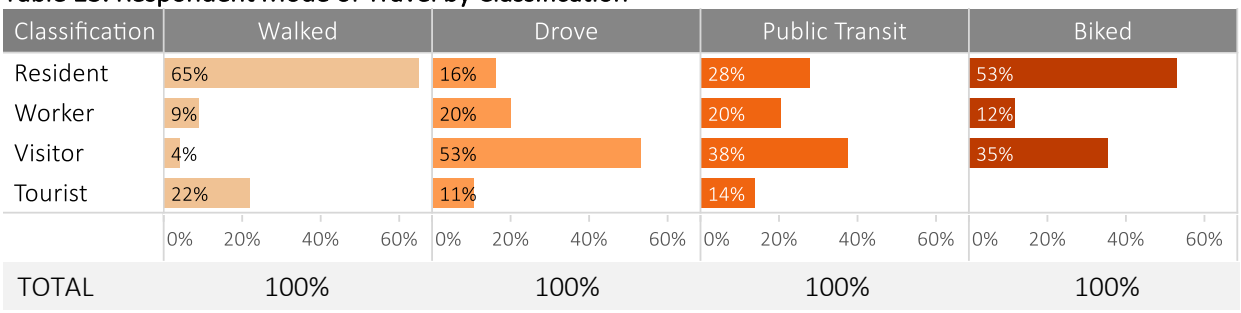
underrepresentation of Bikers is because Bikers were likely unable to be intercepted while moving about the DTLB area. While someone who drove or walked was easy to intercept as a pedestrian, intercepting a biker is likely impossible at which time there would be only a brief window to intercept them before they entered their destination.

Table 12. Respondent Mode of Travel

Mode of Travel	Count
Walked	86
Drove	156
Public Transit	63
Biked	15
Other	0 (originally 20)
Decline	2

In examining the mode of travel by respondent classification, variances largely follow intuition. Residents are substantially more likely to have Walked to DTLB (65% of total) followed by Tourists (22%). In fact, 20 of the 46 Tourists surveyed reported walking to DTLB suggesting that slightly more than half of all Tourists who visit DTLB are staying in a different part of Southern California. Conversely, Visitors are substantially more likely to Drive (53% of all respondents) or take Public Transit (38% of all respondents) than other respondents.

Table 13. Respondent Mode of Travel by Classification



TOTAL	100%	100%	100%	100%

Note. Table to be read down to show percent of each mode of travel made up of each respondent classification. Rows not meant to sum to 100%. Table includes 13 Resident-Workers.

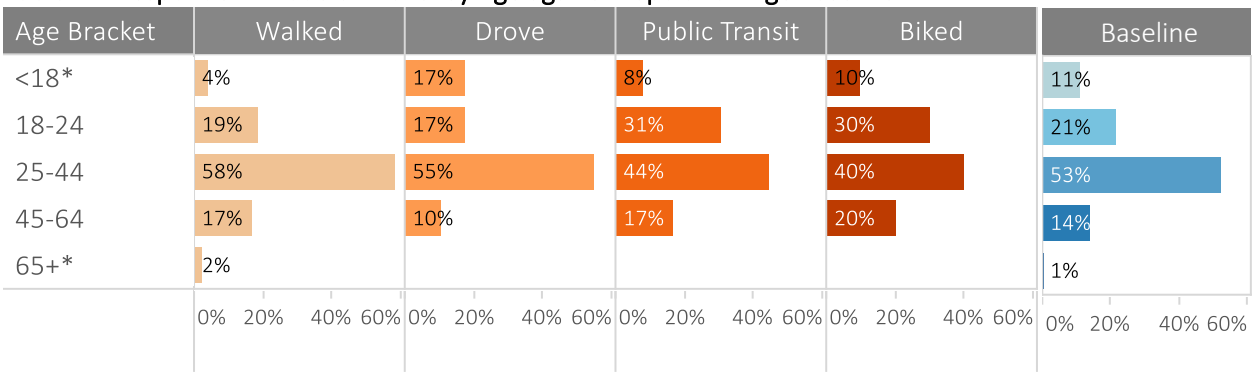
The mode of travel can be further segmented to identify any variance based on the age bracket of respondents. In considering the variance, a baseline must be drawn to the population level age distribution as a point of reference. For example, pedestrians under 18 made up 11% of the total survey population (the population baseline). If age had no bearing on mode of travel, we would then expect the under 18 pedestrian population to make up 11% of each mode of travel. The extent to which participation in a mode of travel diverges from this baseline suggests the divergence is due to a trait in the population correlated with age.

Conducting this analysis reveals three significant findings. First, respondents in the 18-24 age bracket are substantially more likely to have used public transit or biked to DTLB while those in the 25-44 age bracket are substantially less likely to do the same. Second, those in the 45-64 age bracket are substantially more

likely to have biked to DTLB than pedestrians from other age brackets. Given the relative size of the 45-64 age bracket, the percentage that arrived to DTLB by bike is significant. This may suggest that both young and older Visitors to DTLB appreciate the biking accessibility. Third, the under 18 cohort was substantially less likely to walk to DTLB. This finding goes against intuition which would suggest that younger pedestrians would be more reliant on walking as a mode of travel.

Table 14. Respondent Mode of Travel by Age against Population Age Baseline

Age Bracket	Walked	Drove	Public Transit	Biked	Baseline
<18*	4%	17%	8%	10%	11%
18-24	19%	17%	31%	30%	21%
25-44	58%	55%	44%	40%	53%
45-64	17%	10%	17%	20%	14%
65+*	2%				1%



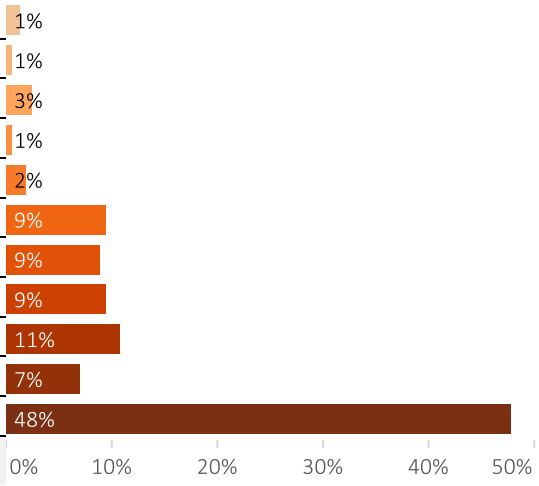
* Baseline sample size for these two age brackets is too small to be statistically significant. Findings related to these are observational.

RESPONDENT PARKING EXPERIENCE

Respondents who drove or biked (or responded other) were asked about their experience finding parking in DTLB. The respondent was asked to provide a numeric value from 0 to 10 with 0 being difficult and 10 being easy. A total of 159 respondents provided a response. The plurality, and nearly a majority, of respondents reported a perfect-10 parking experience. The mean response was an 8.0.

Table 15. Respondent Parking Experience

Parking Experience	Count	Count Percent
0	2	1%
1	1	1%
2	4	3%
3	1	1%
4	3	2%
5	15	9%
6	14	9%
7	15	9%
8	17	11%
9	11	7%
10	76	48%
	TOTAL 159	

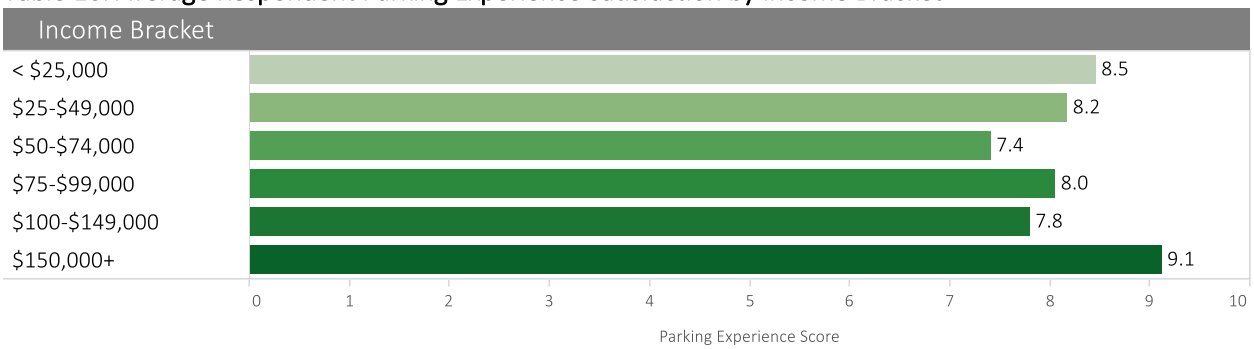


The scale used to report the parking experience allows the responses to be translated into a Net Promoter Score. The Net Promoter Score is discussed in greater detail in the Attitudes about DTLB section but the results of the analysis with regards to the parking experience are included here.

The DTLB parking experience has 87 Promoters out of a total of 159 respondents. It also has 40 Detractors for the same population, giving it a total score of 47 out of 159 for a compiled score of +30. This is an extremely strong overall score indicating that parking would not be a significant deterrent to respondents choosing to visit DTLB and respondents would be substantially more likely to advocate the "ease" of parking to others rather than disparage the same.

Finally, an analysis was conducted to identify if the mean net promoter score for parking ease varied by income. A U-shaped distribution was observed with parking satisfaction being the lowest for the income bracket of $50-74,000 and rising on either side.

Table 16. Average Respondent Parking Experience Satisfaction by Income Bracket



FEELINGS ABOUT DTLB

The survey instrument included a range of questions designed to get at the internal feelings of the respondent towards DTLB. These questions include comparisons of DTLB to other urban areas, direct prompts for the respondents' feelings about DTLB, and preferences the respondent may have for additional amenities they would appreciate in the region.

NET PROMOTER SCORE

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 a metric known as the Net Promoter Score®[1]. The Net Promoter Score is a measure of customer loyalty that has been demonstrated to be a powerful indicator of future revenue growth for a firm. In the case of a City or BID, the Net Promoter Score provides a snapshot of not only a pedestrian's likelihood to return, but the likelihood that they will advocate and push friends to do the same. The Net Promoter Score can and should be used as a baseline for comparison in future studies.

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.

[1] 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.

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 (ie. Kaiser Permanente in 2014) to +72 (ie. Apple in 2014).

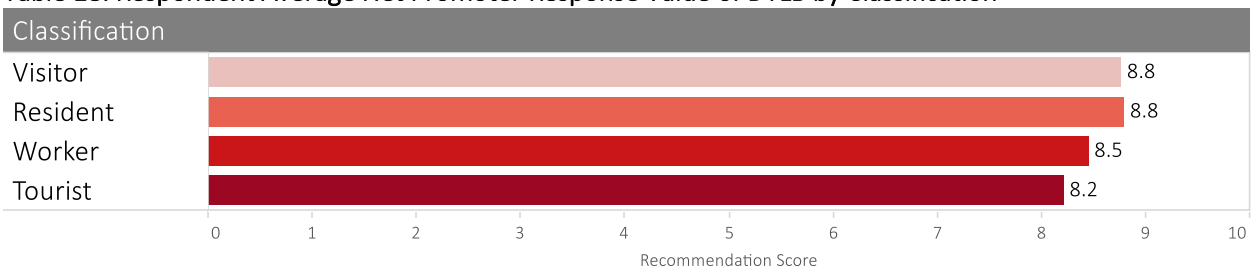
DTLB had an overall Net Promoter Score of +49. The Net Promoter Score varied substantially by the respondents' classification from a low of +35 for Tourists to a high of +53 for Residents and Visitors.

Table 17. Respondent Net Promoter Score of DTLB by Classification

Classification	Residents	Workers	Visitors	Tourists	TOTAL
PROMOTER	72	28	71	20	184
PASSIVE	30	22	40	22	109
DETRACTOR	12	5	8	4	28
NET PROMOTER SCORE	+53	+42	+53	+35	+49

The classifications have average Net Promoter response values as follow.

Table 18. Respondent Average Net Promoter Response Value of DTLB by Classification



The Net Promoter Score and Net Promoter average response values were similarly calculated across age brackets. The analysis, with similar limitations to those described for other age-based analyses, showed a consistent increase in both Net Promoter Score and average response value as respondents aged with the exception of those under 18 years of age who had extremely favorable views of DTLB. Once again, those who declined to provide an age tracked closely to the population wide values.

Table 19. Net Promoter Score and Net Promoter Response Value by Age Bracket

Metric	<18	18-24	25-44	45-64	65+	Declined
Net Promoter Score	+89	+40	+42	+57	+100	+48
Average Value	9.4*	8.4	8.6	8.7	10.0*	8.6

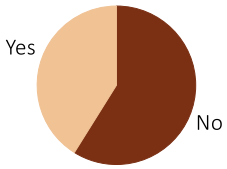
* Sample size is too small to be statistically significant. Findings related to these variables are observational.

RESPONDENT REGIONAL PREFERENCE

Respondents were asked if there was a different Southern California downtown area that they preferred to DTLB. Fully 59% of respondents reported that they did not have a downtown area that they preferred.

Table 20. Respondent Preference for Downtown Area Other than DTLB

Preference	Count	Rate
Yes	132	41%
No	190	59%
TOTAL	322	100%



For respondents who did have a preference, the survey staff solicited the preferred location. A total of 39 different downtown areas were offered. Those areas that appeared four or more times are listed below.

- Los Angeles (29 mentions)
- Santa Monica (21 mentions)
- San Diego (19 mentions)
- Pasadena (6 mentions)
- Huntington Beach (4 mentions)

Residents 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. For respondents that volunteered an "Other" explanation, the vast majority preferred the other downtown location due to its proximity to their home. When respondents struggled to provide an answer, survey staff prompted them with rationales of "better retail," "better restaurants," "better services," and "better entertainment."

The respondents were also cross tabulated to identify differences by survey classification segments. Both Residents and Workers were *more likely* to prefer a different downtown area to DTLB. Conversely, Visitors were substantially less likely to prefer a different downtown area. While perhaps counterintuitive at first, it makes sense that respondents who chose to visit DTLB would have a higher preference for it than those who are more likely present in DTLB because of its proximity or because they are a captive audience.

Table 21. Respondent Preference for Downtown Area Other than DTLB by Classification

Preference	Residents	Workers	Visitors	Tourists
Yes	44%	49%	36%	41%
No	56%	41%	64%	59%

The preferred alternative downtown areas were segmented by classification type to determine if the reported areas differed from the total survey population. Two key differences emerged with Tourists strongly preferring San Diego and Visitors strongly preferring Los Angeles.

Respondents were also cross tabulated by Net Promoter Score to identify changes to how respondents perceived DTLB. In doing so, the total survey population was essentially divided into 20 segments (e.g. net promoter score 0-10 and "yes" vs. "no" segments) making many of the sub-sample populations below statistical significance. Several statistically significant sub-sample populations remained, however, which demonstrated an inverse correlation between Net Promoter Score and preference for other downtown areas. That is, those respondents identified as "Promoters" (e.g. 9s and 10s) were half as likely to prefer a different downtown area as those identified as "Passives." Because there were so few "Detractors" as a group, segmenting them out resulted in them losing statistical significance.

Table 22. Respondent Preference for Downtown Area Other than DTLB by Net Promoter Score

Preference	1	2	3	4	5	6	7	8	9	10
Yes	--	--	100%	33%	36%	54%	49%	61%	29%	32%
No	--	--	0%	67%	64%	46%	51%	39%	71%	68%
Sample Size	0*	0*	1*	3*	11*	13*	37	72	48	136

* Sample size is too small to be statistically significant. Findings related to these variables are observational.

The preferred alternative downtown areas were also segmented by Net Promoter Score to determine if the reported areas differed from the total survey population. Special emphasis was placed on the respondents scoring DTLB as a 6, 7, or 8 as they had the highest alternative preference. Compared to the survey population as a whole, those respondents significantly preferred Los Angeles, San Diego, and Santa Monica to DTLB.

Respondents were finally cross tabulated by income as well to identify key trends. Respondents' preference for alternative downtown areas correlated strongly with an increase in income. The preference was the highest among the $25-$49,000 bracket, surpassing those of the "Under $25,000" bracket likely due to limitations on ability to travel.

Table 23. Respondent Preference for Downtown Area Other than DTLB by Income

Preference	Under $25k	$25-49k	$50-74k	$75-99k	$100-149k	$150k+
Yes	36%	30%	38%	45%	62%	64%
No	64%	70%	62%	55%	38%	36%
Sample Size	107	61	60	33	37	22

As with prior cross tabulations, the preferred downtown areas were analyzed by segment. In limiting the income to just those segments of $75,000 or higher, Los Angeles, San Diego, and Santa Monica remained the most popular results. However, less than one third of those who preferred Los Angeles (9 of 29) and less than one-quarter of those who preferred Santa Monica (5 of 21) are represented in this segment. Conversely, more than half of those who preferred San Diego (10 of 19) remain in this high-income bracket.

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. Respondents could select all, none, or any combination of those categories as the rationale for their preference.

The most commonly cited rationale was Entertainment, followed closely by Restaurants and Retail. Services was a distant last place.

Table 24. Respondent Rationale for Alternative Downtown Preference

Category	Count	Count Percent
Retail	56	42%
Services	25	19%
Restaurants	65	49%
Entertainment	74	56%

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 who had an alternative downtown preference 49% of that subgroup holds that preference due to superior Retail in the other downtown area.

Table 25. Percent of Respondents w/ Preference Identifying a Business Category by Survey Classification

Category	Resident	Worker	Visitor	Tourist
Retail	49%	48%	42%	26%
Services	29%	22%	16%	5%
Restaurants	61%	44%	49%	26%
Entertainment	75%	59%	44%	47%

NOTE. Green indicates the highest value for a survey classification and red the lowest.

Several key findings emerge from this analysis. First, Entertainment is a leading or close to leading category 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, only 12% of respondents listed a business classified as Entertainment.

Table 26. Respondent "One-Wish Business"

Category	Count	Count Percent
Retail	123	39%
Services	9	3%
Restaurants	142	45%
Entertainment	39	12%

A second key finding is that Services were universally the lowest ranked business category for all respondents. In addition, only 3% of respondents identified a Service as their ideal "one-wish business."

Of all responses gathered, 177 unique "one-wish businesses" were identified, some more frequently than others. Those businesses that were specifically named and appeared five or more times are listed below. They are also shown in the following word map along with all specifically named businesses, where size indicates frequency.

- In-N-Out (12 mentions)
- Target (11 mentions)
- Cheesecake Factory (7 mentions)
- H&M (7 mentions)
- Dave & Buster's (7 mentions)
- Nordstrom (6 mentions)
- Chipotle (6 mentions)
- Forever 21 (5 mentions)
- King Taco (5 mentions)
- Buffalo Wild Wings (5 mentions)

Finally, Residents, in addition to being a key demographic that have a strong preference for other downtown areas in Southern California, are strongly opinionated on why they have that preference. For *every business category*, a higher percentage of Residents cited that category's absence as a reason for an alternative preference than *any other survey classification*. Because the above analysis only includes those individuals with a stated preference, the high rate of citation is significant.

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, the table shows that of respondents making Under $25,000 who had an alternative downtown preference 71% of that subgroup holds that preference due to superior Entertainment in the other downtown area.

Table 27. Percent of Respondents w/ Preference Identifying a Business Category by Income Bracket

Category	Under $25k	$25-49k	$50-74k	$75-99k	$100-149k	$150k+
Retail	42%	44%	43%	27%	43%	50%
Services	21%	28%	13%	20%	13%	14%
Restaurants	45%	56%	43%	60%	52%	43%
Entertainment	71%	50%	70%	47%	35%	43%

NOTE. Green indicates the highest value for a survey classification and red the lowest.

A similar set of findings to the above can be observed from the sub-population segmented by income bracket. Once again, Services are the lowest reported preference for every segment. All income brackets place substantial value on access to Restaurants.

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 visit and the second sought to identify spend by location.

In administering the survey, survey staff followed two important protocols. These protocols shaped the subsequent analysis. First, 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 spend and where that spend 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.

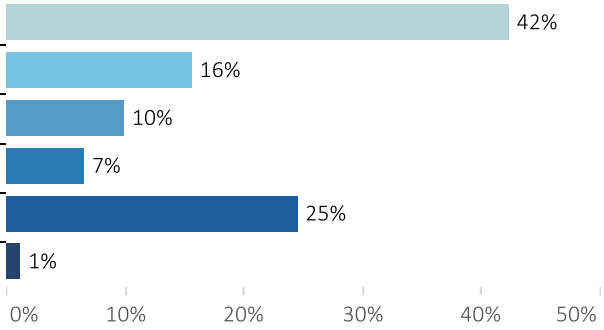
Second, because the survey was stratified by time of day, not all respondents had spent an equivalent amount of time in a given day. That is, a respondent surveyed at 2:00 PM (the end of the earliest shift) would have had a substantially shorter day to report than a respondent surveyed at 1:00 AM (the end of the latest shift). 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. Of the remainder, slightly less than half visited DTLB more than once in the last month and slightly less than half were visiting for the first time.

Table 28. Respondent Frequency of Visits per Month

Category	Count	Count Percent
Daily	136	42%
A few times	50	16%
More than once	32	10%
Once	21	7%
Never	79	25%
Decline to answer	4	1%



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

- Residents and Workers make up 100% of the “daily” pedestrians in DTLB;
- The vast majority, 75%, of Tourists are visiting for their first time;
- Visitors have a relatively even distribution of monthly visit frequencies to DTLB, with routine visits being the most common.

Table 29. Respondent Frequency of Visit per Month by Survey Classification

Category	Visitor	Resident	Worker	Tourist
Daily		104	44	
A few times	43	3		4
More than once	23	4	2	3
Once	16			5
Never	34	4	9	33
Declined to answer	3			1

Similar analyses were conducted segmenting the population by Age Bracket and Income Bracket. These sub-analyses were substantially similar to the larger population trends and had no substantial findings.

An additional analysis was conducted to see if the number of visits was dependent on the mode of transportation to arrive at DTLB. While no large themes emerged, fully 61% of respondents who were visiting DTLB for the first time did so by Driving.

RESPONDENT MONTHLY VISITS

The frequency of visit distributions were used to develop a monthly number of predicted visits. While future number of visits cannot be truly predicted, past behavior can be used here to indicate likely future behavior. 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, subsequent analysis will show that Tourists spend more on entertainment businesses than Residents during any one visit. However, Residents are present in DTLB so much more frequently that their net spend at entertainment businesses is larger than that of Tourists. In shaping economic development policy, it is important to understand not only the likely spend per visit, but the aggregate spend 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.

Table 30. Respondent Monthly Visits

Classification	Population Size	Average Monthly Visits
Visitor	119	3.5
Resident	115	10.6
Worker	55	10.1
Tourist	46	1.7
All pedestrians	322	6.6

Note. Population sizes by classification will not sum to 322 because both the Resident and Worker categories include the 13 Resident-Workers. The All pedestrians row does not double count them.

Analysis was conducted to identify variance in monthly visits by both age and income. While modest variances existed, all statistically significant results were between 6.3 and 6.8 visits per month. Survey classification (e.g. Residents, Workers, etc.) is the primary driver of the number of visits per month.

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.

The data reveals several key findings:

- Residents are the primary patrons of retail businesses;
- Residents and Workers are the primary patrons of service businesses;
- While all pedestrians are likely to visit restaurants, Residents and Visitors are among the least likely to do so while Workers (e.g. lunch) are more likely and almost all Tourists do so. While Residents and Visitors are less likely to visit, their number of visits continue to make them important to restaurants as a whole; and
- Visitors and Tourists are the primary patrons of entertainment businesses despite most pedestrians citing “better entertainment” as a key reason for preferring a different downtown area.

Table 31. Respondent Likelihood of Visit to a Business Category by Classification

Category	All	Visitor	Resident	Worker	Tourist
Retail	71%	62%	89%	58%	61%
Restaurant	76%	71%	70%	80%	98%
Service	17%	13%	26%	24%	4%
Entertainment	32%	47%	26%	5%	35%

The data was also cross tabulated to by age brackets. The data reveals a correlation between young persons and a higher frequency of visits to businesses. As pedestrians age, the likelihood of visiting any business tends to decline. The one exception to this trend is that the likelihood of visiting a restaurant business increases with age. Young pedestrians, identified as those under the age of 25, are more than twice as likely as older pedestrians to visit all other business types.

Table 32. Respondent Likelihood of Visit to a Business Category by Age Bracket

Category	All	<18	18-24	25-44	45-64	65+	Decline
Retail	71%	78%	109%	53%	39%	*	75%
Restaurant	75%	44%	57%	91%	65%	*	75%
Service	17%	33%	17%	22%	26%	*	11%
Entertainment	32%	72%	49%	36%	26%	*	23%

* Population is not statistically significant.
** Results greater than 100% indicate that the typical respondent reported patronizing more than one business of that business category.

RESPONDENT TYPICAL SPEND

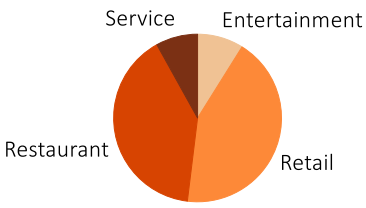
Respondents were asked about their spending behaviors. The question asked about spending behaviors on the survey day to increase the accuracy of the response. The spending behaviors were aggregated and averaged to produce a typical spend reflective of the typical visit to DTLB.

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, 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. 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.

Retail businesses attracted 43% of all spending followed closely by restaurants with 40%. Service and entertainment businesses each made up less than 10% of all spending.

Table 33. Percent Distribution of Sample Set Spending by Business Type

Category	Spend
Retail	43%
Restaurant	40%
Service	8%
Entertainment	9%



Pedestrians spent on average $29.51 per business visited from a low of just over $16 at entertainment businesses to a high of nearly $35 at retail businesses. Those rates varied substantially by survey

classification. Visitors spent substantially more than the population average at every single business type. Comparatively, Workers spent less at every business type except for retail where they spent slightly more. Finally, Tourists are significant in how little they spend on retail. While other survey classifications spent around or above the average, Tourists spend approximately one-third as much as other classifications. This suggests that Tourists do not visit DTLB as a retail destination and are looking for larger, more established retail areas such as malls.

Table 34. Average Spend per Visit at Business Type by Survey Classification

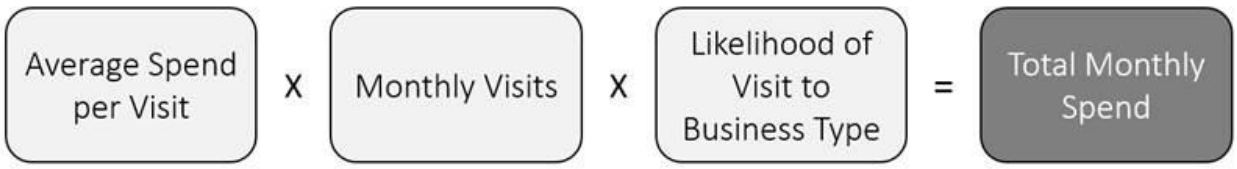
Category	All	Visitor	Resident	Worker	Tourist
Retail	$35	$43	$35	$39	$12
Restaurant	$31	$36	$33	$18	$28
Service	$28	$38	$28	$12	$35
Entertainment	$16	$19	$12	$12	$15

The analysis was also cross tabulated by age and income bracket. Both analyses revealed the same three key findings:

- Younger and lower income pedestrians spend substantially more on retail than older and higher income pedestrians;
- Spending at restaurants is relatively constant but increases slightly with both age and income; and
- Spending at service and entertainment businesses increases substantially with both age and income.

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 spend at a typical business. The calculation utilizes the data discussed in tables 30 through 34, above, following the below formula.



The findings vary substantially when segmented with a key driver being 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 average pedestrian in DTLB can be expected to spend approximately $382 each month across all business types.

Table 35. Typical Pedestrian Monthly Spend

Category	Monthly Visits	Likelihood Visit	Average Spend	Monthly Spend
Retail	6.6	71%	$35	$163
Restaurant	6.6	76%	$31	$154
Service	6.6	17%	$28	$31
Entertainment	6.6	32%	$16	$34
TOTAL				$382

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 spend for all survey classification types in all categories. The monthly spend is driven by the number of visits and spending more per visit. In interpreting the data, it is important to note that the values are not distorted by the relative size of the Resident classification cohort. This is the spending of the typical Resident, not the spending of all Residents.

Workers, who have an average of 10.1 visits per month, 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 spend almost nothing at entertainment businesses. In addition to a below average spend, only 5% of workers visit entertainment businesses. The result is that Workers as a population have an almost inconsequential impact on DTLB's entertainment businesses.

Visitors, who average 3.5 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. Visitors spend almost as much as Residents on entertainment each month despite visiting one-third as often. 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 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.

Table 36. Typical Pedestrian Monthly Spend by Survey Classification

Category	All Spend	Resident Spend	Worker Spend	Visitor Spend	Tourist Spend
Retail	$163	$330	$227	$94	$12
Restaurant	$154	$245	$149	$88	$48
Service	$31	$78	$28	$17	$3
Entertainment	$34	$34	$6	$31	$9
TOTAL	$382	$687	$410	$229	$72

Similar analyses were conducted to identify typical monthly spend by both age and income brackets. As with similar cross tabulations by age and income bracket, the key pattern emerged that retail spending declined substantially with both age and income. Conversely, restaurant, service, and entertainment spending increased substantially. The analysis segmented by age is shown below for all statistically significant segments.

Table 37. Typical Pedestrian Monthly Spend by Age Bracket

Category	All Spend	Under 18	18-24	25-44	45-64
Retail	$163	$199	$182	$119	$79
Restaurant	$154	$101	$112	$213	$232
Service	$31	$25	$17	$30	$96
Entertainment	$34	$30	$21	$42	$59
TOTAL	$382	$355	$333	$404	$467

Aggregating the spend over a monthly period allows the patterns to be more pronounced. A 45-64 year old pedestrian spent approximately 40% as much on retail, 230% at restaurants, 400% on services, and 200% on entertainment compared to the Under 18 age bracket.

These findings suggest a number of potential courses of action. For example, additional research could be conducted to identify what types of services appeal to the Under 18 pedestrian to attempt to capture a portion of an unspent dollar. Alternatively, research may demonstrate that the Under 18 pedestrian

simply does not spend a significant amount on services and entertainment, and instead, resources should be allocated to attract additional services that appeal to older pedestrians.

APPENDIX

POPULATION WIDE TRENDS

A number of macro trends emerged around specific sub-segments of the population or around specific behaviors common to all pedestrians in DTLB. These macro trends were further analyzed to develop six economic profiles of different populations. The six economic profiles are Loyal Locals, Resident Champions, Volume Visitors, Golden Guests, Typical Tourists, and Wealthy Workers.

For some of the profiles identified, interesting patterns emerged that help explain behaviors. For others, the key takeaway of the economic profile that an expected behavior does not manifest. Each takeaway is useful in helping to understand the aggregate behavior of pedestrians in DTLB. In addition, several general trends that are not particular to a segment of the total population were identified and included below.

In interpreting these profiles, it is important to understand a key limitation of the data. The data presents statistically significant findings about behaviors that can be reported as fact. The data does not show the impetus behind the behaviors. For example, the data definitively shows that the likelihood of a Golden Guest preferring a different downtown area to DTLB actually increases along with their satisfaction of DTLB. That finding was interpreted to suggest that Golden Guests visit DTLB primarily out of convenience (as they certainly have the economic means to go elsewhere and are not Residents). While the expanded finding is suggested by the data, it is not fact.

ENTERTAINMENT

There is a common trend throughout the data for pedestrians who prefer a different downtown area to cite “better entertainment” and “better restaurants” as a reason for that preference. Despite that preference, most pedestrians still had high rates of frequenting DTLB restaurants. The same was not true for DTLB entertainment businesses which routinely had extremely low patronage rates. This suggests that while pedestrians may prefer even more restaurants and a greater diversity, the existing supply of restaurants actually meets their needs. Conversely, the existing supply of entertainment genuinely does not appear to meet the threshold demands for many pedestrians.

Golden Guests account for just 18% of respondents but account for 32% of reported entertainment spend. Volume Visitors account for just 19% of the population but account for 31% of the entertainment spend. Given these visitor groups abilities to select a different downtown area to frequent, their signal by both survey response and dollar vote reinforces the value they place on entertainment.

AGE, INCOME, AND SPENDING

As respondents age, income tended to increase. This correlation follows intuition. Similarly, those with higher incomes tended to spend more in any one “spending event” which also follows intuition.

As age and income increased, the likelihood of patronizing any one business declined and so too did the total number of spending events in DTLB. That is, a young, low-income pedestrian was likely to visit multiple restaurants and a retail store on any visit to DTLB. They would not spend much at any one store, but the aggregate of all of their purchases is considerable. More importantly, they were more likely to return to DTLB the next week and do it again.

Conversely, an older, wealthier pedestrian was more likely to come to DTLB just to visit one restaurant or one store to make one sizable purchase. They might not return to DTLB until next month. The size of the purchase makes attracting this pedestrian very appealing, but the aggregated and repeat value of their spend was often equal to or less than their low-income counterparts.

RESIDENT TRENDS

The economic profiles developed for residents (Loyal Locals and Residents Champions) examine two sub-populations each with unique traits that help inform why they take certain behaviors (i.e. one is lower income and another are DTLB enthusiasts). These profiles were developed because analysis revealed important trends for low-income residents and different trends for DTLB enthusiasts. Analysis of wealthy residents did not reveal any compelling trends.

Because the traits are not mutually exclusive, many residents are included in both groups. This is distinct from economic profiles developed for the other groups, which were mutually exclusive (i.e. Volume Visitors and Golden Guests comprise all guests segmented by income). This created a gap wherein a small population of pedestrians were not included in any economic profile. That population is Residents with high-incomes who are non-Promoters of DTLB.

The key distinguishing features of the high-income non-promoter population are that it is substantially more likely to be female (65%), has a strong preference for other downtown areas (75% with San Diego and Pasadena being the most commonly cited), and has very low rates of spending. Although they are in DTLB daily, the percentage of visits to DTLB that result in spending money at a business are extremely low compared to other economic profiles with the one exception being spending at restaurants which is in line with average Residents.

PROFILE 1: LOYAL LOCAL

"Loyal Locals" are Residents that are young, loyal, and frequent spenders with an emphasis on retail and services. Their small purchases aggregate into significant local economic impact, particularly for service businesses.

Loyal Locals, defined as Residents reporting an annual income of $50,000 or less, are a young and loyal contingent of the DTLB economy. They have a lot of opinions on what would make DTLB a better place to live and work but are generally very supportive of DTLB.

Measure	Loyal Local	All Resident	Population Average
Age	28.6	30.8	30.8
Income	$26,000	$57,100	$58,600
Gender	52% female	50% female	55% female
Net Promoter	+58	+53	+49
Visits per month	10.9	10.6	6.6

Loyal Locals report satisfaction with DTLB that follows a bell curve. The "under 18" crowd and "over 65" crowd (both small populations) have a net promoter score of +100. The 18-25 and 45-65 crowd have net promoter scores of +62 and +67, respectively. The 45-65 age bracket have the lowest net promoter score of +45.

This bell curve suggests the same self-selection pattern observed in Volume Visitors wherein young Loyal Locals have few other options and so really embrace where they live. Conversely, older Loyal Locals have chosen to continue living in DTLB and similarly embrace where they live. The middle brackets, those who are still transitioning through life, have a more mixed reaction to DTLB. However, among Loyal Locals, that "mixed reaction" is still an extremely supportive +45 net promoter score.

Nearly half of all Loyal Locals got to DTLB by walking and those that drove reported extremely high satisfaction with parking. Much like Workers, Loyal Locals who drive typically have secured parking and do not find it to be an issue.

Only 37% of Loyal Locals prefer a different downtown area. This is among the lowest percentage of all population segments. As with Volume Visitors, the percentage of Loyal Locals that prefer a different downtown area decreases as the net promoter score increases. Again similar to Volume Visitors, they preferred other downtown area is Los Angeles. This follows the larger population wide pattern that younger, less affluent pedestrians are looking for an urban experience similar to Los Angeles while older, more affluent prefer a Santa Monica or San Diego.

Fully 92% of Loyal Locals report being active consumers daily. That said, for all business types Loyal Locals are low spenders, likely due to their more modest income. Compared to the average Resident, Loyal Locals spend substantially less, approximately 60%, on restaurants. Comparatively, Loyal Locals spent slightly more on services and about 60% more on entertainment.

Business Type	Loyal Local Per Event Spend	All Resident Spend	Loyal Local Monthly Spend	All Resident Monthly
Retail	$30	$35	$295	$330
Restaurant	$24	$33	$150	$245
Service	$28	$28	$98	$78
Entertainment	$18	$12	$54	$34

Loyal Locals follow a general pattern where younger, less affluent pedestrians patronize businesses more often (Loyal Locals were more likely to patronize all business types at a higher percentage than Residents) but spend less. Despite that, the high number of visits and stickiness to DTLB, whether that is from affinity to the area or less ability to commute elsewhere, aggregate to significant economic impact. While Loyal Locals are low spenders at restaurants compared to Residents in general, their retail spending is close to that of the general Resident population which has incomes more than twice as high.

PROFILE 2: RESIDENT CHAMPION

Resident Champions are fairly typical Residents with the distinction that they love DTLB. As a result, they visit more businesses and spend a little more at each for a big economic impact.

Measure	Resident Champ	All Resident	Population Average
Age	32.4	30.8	30.8
Income	$58,900	$57,100	$58,600

An early economic profile of a Resident Champion, defined as Residents with high satisfaction with DTLB, was investigated that had limited statistical significance. The profile was further investigated by limiting the population to only Residents that were also Promoters (e.g. rated DTLB a 9 or a 10). Limiting to this smaller population revealed more impressive findings while still retaining a statistically significant sample size of 72 Residents.

Gender	46% female	50% female	55% female
Net Promoter	+100	+53	+49
Visits per month	10.6	10.6	6.6

Resident Champions are slightly older than the typical pedestrian, earn about the same, and are more likely to be male than female. In fact, male residents in general are substantially more supportive of DTLB than female residents. As a result, more male residents are Promoters and included as Resident Champions.

Only 32% of Resident Champions preferred a different downtown area. Those with a preference were evenly split between Los Angeles and Santa Monica.

The key distinction among Resident Champions is that they patronize stores slightly more frequently than typical Residents (and substantially more than the general population) and spend a little every time they do it. Those two metrics, combined with the high number of monthly visits to all Residents, compound into a significant increase in economic activity.

Business Type	Resident Champ Per Event Spend	All Resident Spend	Resident Champ Monthly Spend	All Resident Monthly
Retail	$37	$35	$381	$330
Restaurant	$39	$33	$277	$245
Service	$31	$28	$87	$78
Entertainment	$13	$12	$41	$34

Resident Champions are the only group where a trend of "if they're happier, they spend more" has been shown. For other economic profiles, the drivers of behavior appear to be general patterns (e.g. older pedestrians visit fewer shops), economic (e.g. lower income people spend less), or logistical (e.g. Workers that commute tend to drive home immediately after work). This is the first pattern where the respondent population spends more than a general population where the only variable manipulated is how much they like DTLB.

PROFILE 3: VOLUME VISITOR

"Volume Visitors" are young, frequent Visitors to DTLB who are looking for a Los Angeles-esque experience. The more they like it, the more they visit and all visits are marked by small spends at a range of businesses. These spends aggregate into an important population of spenders.

Measure	Volume Visitor	All Visitors	Population Average

Volume Visitors, defined as Visitors reporting an annual income of $50,000 or less, are a valuable pedestrian population. Volume Visitors spend about the same or less than the average Visitor at any given business, but they make a lot of visits. Volume Visitors are the people who commute to DTLB as their destination to "get stuff done."

Age	25.1	27.5	30.8
Income	$27,500	$55,200	$58,600
Gender	56% female	57% female	55% female
Net Promoter	+52	+53	+49
Visits per month	3.9	3.5	6.6

Volume Visitors make an average of 3.9 visits per month versus the overall Visitor at 3.5. During these visits, Volume Visitors visit all business types in roughly the same proportions as general Visitors and, as mentioned above, spend about the same or less at each business. The aggregate impact of their total spend outstrips their wealthier Golden Guest counterparts due to the higher number of visits.

Business Type	Volume Visitor Per Event Spend	All Visitor Spend	Volume Visitor Monthly Spend	All Visitor Monthly
Retail	$48	$43	$128	$94
Restaurant	$35	$36	$101	$88
Service	$39	$38	$20	$17
Entertainment	$18	$19	$33	$31

Volume Visitors reported preferring a different Southern California downtown area at much lower rates than other populations (31% vs 41% general population). Following intuition, as the respondent's reported net promoter score increased, their preference for a different location decreased. That is, of Volume Visitors rating DTLB a perfect-10, only 15% preferred a different downtown location. This is contrasted by Volume Visitors rating DTLB a 6 with 67% preferring a different location.

Net promoter score was positively correlated with both age and income for Volume Visitors. As Volume Visitors aged or grew in wealth, they liked DTLB more. This trend is supported by two potential patterns. There is potential for a self-selection process where Volume Visitors that enjoy DTLB continue to live nearby and patronize the area while Volume Visitors that do not enjoy DTLB tend to move away over time or as income increases. Alternatively, it is possible that even modest increases in wealth (which tend to correlate with age) make DTLB much more accessible and enjoyable.

For those with a preference for a different location, Los Angeles was the overwhelming destination with 8 of 19 respondents. These individuals tended to be younger and less satisfied with DTLB.

About 65% of Volume Visitors drove to DTLB and 24% took public transit. This was the largest population to take public transit. Those who drove had very polarized attitudes about parking. As a population, Volume Visitors reported a net promoter score of +23 with regards to parking. However, Volume Visitors with annual incomes below $25,000 reported a +50 while those with incomes of $25,000 to $49,000 reported a net promoter score of +0. This is a common pattern that emerged throughout the data with the very poor and very wealthy being more satisfied with parking than those of middle incomes.

PROFILE 4: GOLDEN GUEST

"Golden Guests" are older, affluent pedestrians who visit from time to time but spend a lot. DTLB is often not their favorite downtown area, but they keep coming back. They prefer a Santa Monica or a San Diego experience and that preference increases as they get wealthier.

Golden Guests, defined as Visitors reporting an annual income of $50,000 or more, are positively disposed to Downtown Long Beach but also see it as a good alternative to other great Southern California destinations that they may like more. DTLB is a convenient and fun destination, but they are not tied to it.

Measure	Golden Guest	All Visitors	Population Average
Age	30.2	27.5	30.8
Income	$85,200	$55,200	$58,600
Gender	63% female	57% female	55% female
Net Promoter	+54	+53	+49
Visits per month	3.0	3.5	6.6

Golden Guests reported preferring a different Southern California downtown area at about the same rates as the general population (42% vs. 41% for general population). What set Golden Guests apart is that the preference for other downtown areas did not decrease as the Net Promoter Score increased. In many instance, they increased in tandem. For example, 46% of Golden Guests, higher than the Golden Guest average, who rated DTLB a perfect-10 also prefer a different downtown area.

In examining the other preferences, San Diego and Santa Monica are tied as the preferred location. For Golden Guests reporting a preference for San Diego and Santa Monica, "better restaurants" was the most commonly cited rationale for the preference. Across all preferred locations, the rationales of "better shopping," "better restaurants," and "better entertainment" were reported for roughly 50% of all respondents with a preference. The pattern that emerges is that there are not strong rationales for the preference, they merely prefer other places, but they continue to visit DTLB because it is convenient.

About 55% of Golden Guests had been to DTLB a few or more than five times in the past month. About 42% reported having visited once or never. This rate of visitation to DTLB is lower than that of Low-Income Visitors, but demonstrates substantial repeat visits for the population as a whole.

Almost 80% of Golden Guests to DTLB drove. Unfortunately, Golden Guests reported among the lowest satisfaction with parking in DTLB with a net promoter score of +16. While they still find it easy to park and are generally positive, they are much less satisfied than the general population. A substantial portion of this lower satisfaction is from the middle-income brackets included in the Golden Guest population segment. As with the larger trend, low-income and high-income pedestrians have higher satisfaction with parking that pedestrians of middle-incomes.

For Golden Guests, as income increases, the net promoter score decreases. Golden Guests giving DTLB a perfect-10 averaged income of $77,900. As net promoter score declines to 6, average income increases to $91,500. Income peaks at $96,800 for Golden Guests giving DTLB a net promoter score of 7. This finding suggests that there is a bliss point for Golden Guests. Those with ample discretionary income genuinely enjoy DTLB while those approaching "rich" begin to desire a higher level of amenity.

Golden Guests are a lucrative population. Although their spend at a typical business is not as strong as Volume Visitors (e.g. Golden Guests pull down the overall Visitor average), they exceed the general population for every business type. A Golden Guest visiting DTLB is likely to spend a substantial amount.

Golden Guests, however, only average 3.0 visits per month. This is below the 3.5 averaged for all Visitors and 3.9 for Volume Visitors. While they are substantial spenders, their infrequent visits leads to a smaller overall economic impact. In addition, their preference for other Southern California downtown areas and financial ability to travel to those locations makes incremental investment in attracting Golden Guests a difficult proposition. Currently, Golden Guests visit DTLB because it is convenient and meets expectations.

Business Type	Golden Guest Per Event Spend	All Visitor Spend	Golden Guest Monthly Spend	All Visitor Monthly
Retail	$37	$43	$62	$94
Restaurant	$36	$36	$74	$88
Service	$38	$38	$14	$17
Entertainment	$19	$19	$28	$31

PROFILE 5: TYPICAL TOURIST

"Typical Tourists" are older, affluent pedestrians who likely have never been to DTLB before. Those that drove to DTLB are generally happier than those that walked or stayed here. They are among the biggest of spenders, but their numbers are so few that they do not drive serious economic activity.

The Typical Tourist has a challenging relationship with Downtown Long Beach. As with all pedestrians, the Typical Tourist is positively disposed towards DTLB, but is among the least positive of all pedestrian classifications. The Typical Tourist had a Net Promoter Score of +35 compared to the pedestrian average of +49.

Measure	Typical Tourist	Population Average
Age	34.4	30.8
Income	$66,100	$58,600
Gender	63% female	55% female
Net Promoter	+35	+49
Visits per month	1.7	6.6

The Typical Tourist has never been to DTLB before with 72% of Tourists reporting their first visit. The Net Promoter Score of first time Tourists is +27, substantially lower than the overall Tourist population. This suggests a high churn rate where efforts to attract new Tourists do not result in repeat visits. Tourists that choose to return, not surprisingly, feel more positively towards DTLB. Tourists that have visited DTLB "five or more" times in the past have a Net Promoter Score of +67.

As a population, only about 43% of Tourists walked to DTLB. This suggests that the Typical Tourist actually stays in a different Southern California area and visits DTLB as a part of their vacation rather than staying here exclusively. An additional 37% drove and 20% took public transit.

Tourists that Drove had a Net Promoter Score of +53 while those that walked were +20. There is a potential pattern that Tourists who include a visit to DTLB for a day of their vacation enjoy the experience

(stay elsewhere, drive to DTLB, enjoy easy parking) while those who visit extensively (stay here, walk to local sights) are less satisfied. The most common downtown area preferred over DTLB is San Diego. This preference did not correlate with age, income, or Net Promoter Score.

Tourists tend to be older with higher incomes. Despite this, Tourist spending in DTLB tends to be average or lower than average compared to the general pedestrian population. This below average spend is compounded by the fact that the Tourists average only 1.7 visits per month to DTLB (including the survey day itself). In interpreting the monthly spend results, it is important to recognize that Tourists are marginalized compared to other survey classifications which naturally make more visits. However, in order to estimate the long term value of the daily behaviors the survey measured, some period of time is required. Using a month as a period of time is preferred to an alternative wherein only daily spending activities are reported. Reporting solely at the daily level would suggest that an incremental investment in attracting future Tourists would return approximately equal result to an incremental investment in a Volume Visitor when we know that is not true.

Business Type	Typical Tourist Per Event Spend	Population Spend	Typical Tourist Monthly Spend	Population Monthly
Retail	$12	$35	$12	$163
Restaurant	$28	$31	$48	$154
Service	$35*	$28	$3*	$31
Entertainment	$15	$16	$9	$34

* Not a statistically significant sample size.

Tourists who visit DTLB make a substantial number of visits to retail and restaurant businesses. Only 39% of Tourists reported patronizing an entertainment business. Conversely, when asked what made a Tourist prefer a different Southern California downtown area over DTLB, “better entertainment” was the top answer by a substantial margin (47% of respondents versus 26% for “better retail” and “better restaurants”). This suggests that not only do Tourists want more entertainment opportunities, but they find the current opportunities so lacking that they do not even patronize the existing businesses.

PROFILE 6: WEALTHY WORKERS

Wealthy Workers are middle-aged males that commute in to work, usually purchase lunch, and then leave DTLB to spend the majority of their time and money in a different, preferred downtown area.

Wealthy Workers, identified as those earning $50,000 or more, are older and more likely to be male.

Measure	Wealthy Worker	All Workers	Population Average
Age	36.5	32.7	30.8
Income	$114,300	$60,700	$58,600
Gender	45% female	56% female	55% female
Net Promoter	+45	+42	+49
Visits per month	10.5	10.1	6.6

Wealthy Workers are most interestingly defined in contrast to their less-wealthy working counterparts. The non-Wealthy Workers were substantially more likely to be female and substantially younger (28 years vs 36 for Wealthy

Workers). While workers as a population spent an average of $227 per month on retail, Wealthy Workers spent only $181. Conversely, while Workers overall spent $149 at restaurants, Wealthy Workers spent $230 each month. In each instance, the non-Wealthy Workers made up the reciprocal difference, meaning that Wealthy Workers spent more than 230% as much as non-Wealthy Workers at restaurants.

Business Type	Wealthy Worker Per Event Spend	Worker Spend	Wealthy Worker Monthly Spend	Worker Monthly
Retail	$38	$39	$181	$227
Restaurant	$23	$18	$230	$149
Service	$13	$12	$31	$28
Entertainment	--	$12	--	$6

The general profile for a Wealthy Worker is a Worker that commutes into DTLB to work and drives home immediately after. A Wealthy Worker spends a moderate amount most likely on lunches and the occasional Happy Hour before leaving DTLB.

More than 73% of Wealthy Workers preferred a different downtown area. This is in stark contrast to the 33% of non-Wealthy Workers. Wealthy Workers do not favor DTLB for retail, service, and reported $0 spend on entertainment businesses. Most Wealthy Workers likely have a preferred downtown area that is closer proximity to their home.

CORE INSIGHTS

From the economic profiles and other behavioral data, three core insights can be inferred:

1. **Provide an Authentic Long Beach Experience**. The biggest spenders are the segments who choose to live in DTLB or choose to visit frequently (e.g. Residents and Visitors of all types).
2. **Expand the Fan Club**. Increasing the number of monthly visits is a driver of total spending. Visitors are an apt audience to increase monthly visits and, ideally, bring new visitors with them.
3. **Understand the Gaps**. Some audiences are either already captive (e.g. Wealthy Workers) or not big spenders (e.g. Typical Tourists) and their relationship with DTLB should be considered in designing any outreach efforts.

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. What year were you born?

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+