

MAJORITY OPINION

R E S E A R C H

Downtown Pensacola Perception Study



September 2017

Contents

Purpose and Methodology	3
Key Findings	4
Downtown Patron Profile	5
Net Promoter Score	6
Downtown Perceptions	9
Delivery vs Expectations	10
Missing from Downtown	13
Interest in Bike Share	14
Additional Comments	15

Purpose and Methodology

The purpose of this marketing research is to benchmark and then track perceptions and needs for downtown Pensacola among both residents and visitors.

A two-pronged data collection methodology was utilized between August 22 and September 18, 2017:

Survey interviewers intercepted individuals in downtown Pensacola and administered the survey via electronic tablets.

The Downtown Improvement Board emailed the survey link to their database of stakeholders (merchants, business owners, property owners, etc.) and asked for their participation.

A total of 202 surveys was completed.

180 via the intercept interviews

22 via the online survey

Key Benchmark Findings

At any one time, downtown Pensacola patrons are a mix of residents (86%) and visitors (14%). The average age of adults is 42, although 40% are Millennials. Average household incomes are nearly \$74,000, although 41% have incomes under \$50,000 and 20% have incomes of \$100,000 or more. There is also a mix of races enjoying the downtown area (59% Caucasian/White, 30% African-American/Black, 5% Asian, 3% Hispanic, and 3% other races).

Downtown Pensacola has a current Net Promoter Score (NPS) of 86. This score is higher among visitors (93%) than residents (86%); higher among those under age 45 (90%) than those age 45 or older (82%); higher among those with household incomes less than \$75,000 (90%) than those with incomes of \$75,000 or more (81%); and is the same (88%) among Caucasians and African-Americans, while being lower among other less-represented races.

The current NPS is being boosted by perceptions that downtown Pensacola feels safe during the day and at night, has places and opportunities for people to meet each other and is family-friendly. Improving perceptions of having good shopping options and strong economic/employment conditions will do the most to further elevate downtown's NPS score. The availability and cost of parking is where downtown Pensacola receives its lowest ratings, but parking does not have a significant influence on the NPS.

While nearly six out of ten patrons can not think of anything missing from downtown Pensacola, others would like to see more parking, public restrooms, retail shops, more clubs (dancing and comedy), and more diversity and things for minorities.

Six out of ten downtown patrons are currently interested in having a bike share program, with more than one-third (36%) being 'very interested.'

2017 Downtown Patron Profile

Composition

Residents	86%
Visitors	14%

Age

Under 25	17%
25 – 34	23%
35 – 44	16%
45 – 54	14%
55 – 64	23%
65 or older	7%
<u>Average Age</u>	<u>42</u>

Generations

Centennials (1996-)	8%
Millennials (1977-1995)	40%
Generation X (1965-1976)	19%
Baby Boomers (1946-1964)	29%
Silent Generation (before 1946)	4%

Household Income

Less than \$25,000	9%
\$25,000 - \$34,999	11%
\$35,000 - \$49,999	21%
\$50,000 - \$74,999	23%
\$75,000 - \$99,999	16%
\$100,000 - \$149,999	13%
\$150,000 - \$199,999	3%
\$200,000 or more	4%
<u>Average Income</u>	<u>\$73,801</u>

Race/Ethnicity

African-American/Black	30%
Asian	5%
Caucasian/White	59%
Hispanic	3%
Middle Eastern	2%
Any other race or ethnicity	1%

Net Promoter Score

The Net Promoter Score (NPS) is an index ranging from -100 to 100 that measures the willingness of people to recommend an area to others. It is used as a proxy for gauging the overall satisfaction with a product, service or area...in this case Downtown Pensacola.

Net Promoter Score Calculation

Individuals are asked to rate their likelihood of recommending the area to family, friends or colleagues. Based on their rating, they are then classified in 3 categories:

DETRACTORS

'Detractors' give a score lower or equal to 6. They are not particularly thrilled with the area. They, with all likelihood, won't recommend the area to anyone and could potentially damage the downtown reputation through negative word of mouth.

PASSIVES

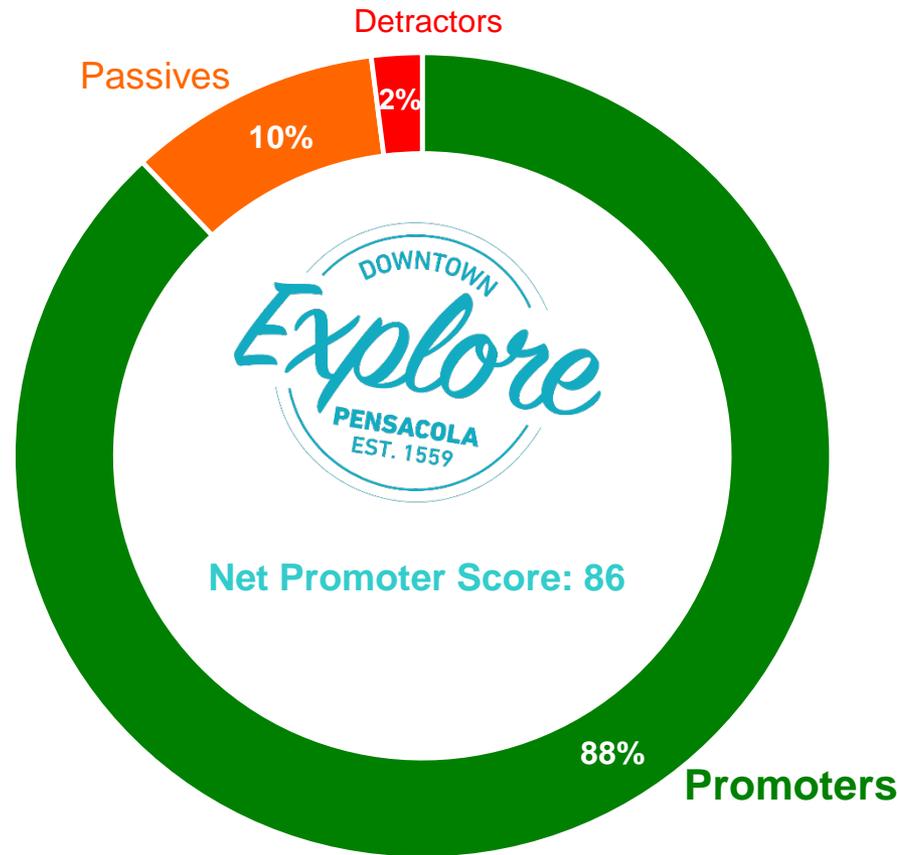
'Passives' give a score of 7 or 8. They probably wouldn't spread any negative word-of-mouth, but are not enthusiastic enough about the area to actually promote it.

PROMOTERS

'Promoters' give a score of 9 or 10. They are enthusiastic evangelists who will strongly recommend the area to others.

The NPS is determined by subtracting the percentage of detractors from the percentage of promoters. What is generated is a score between -100 and 100 called the Net Promoter Score. At one end of the spectrum, if when surveyed everyone gave a score lower or equal to 6, an NPS of -100 would result. On the other end of the spectrum, if everyone gave a score of 9 or 10, the NPS would be 100.

2017 Downtown Net Promoter Score

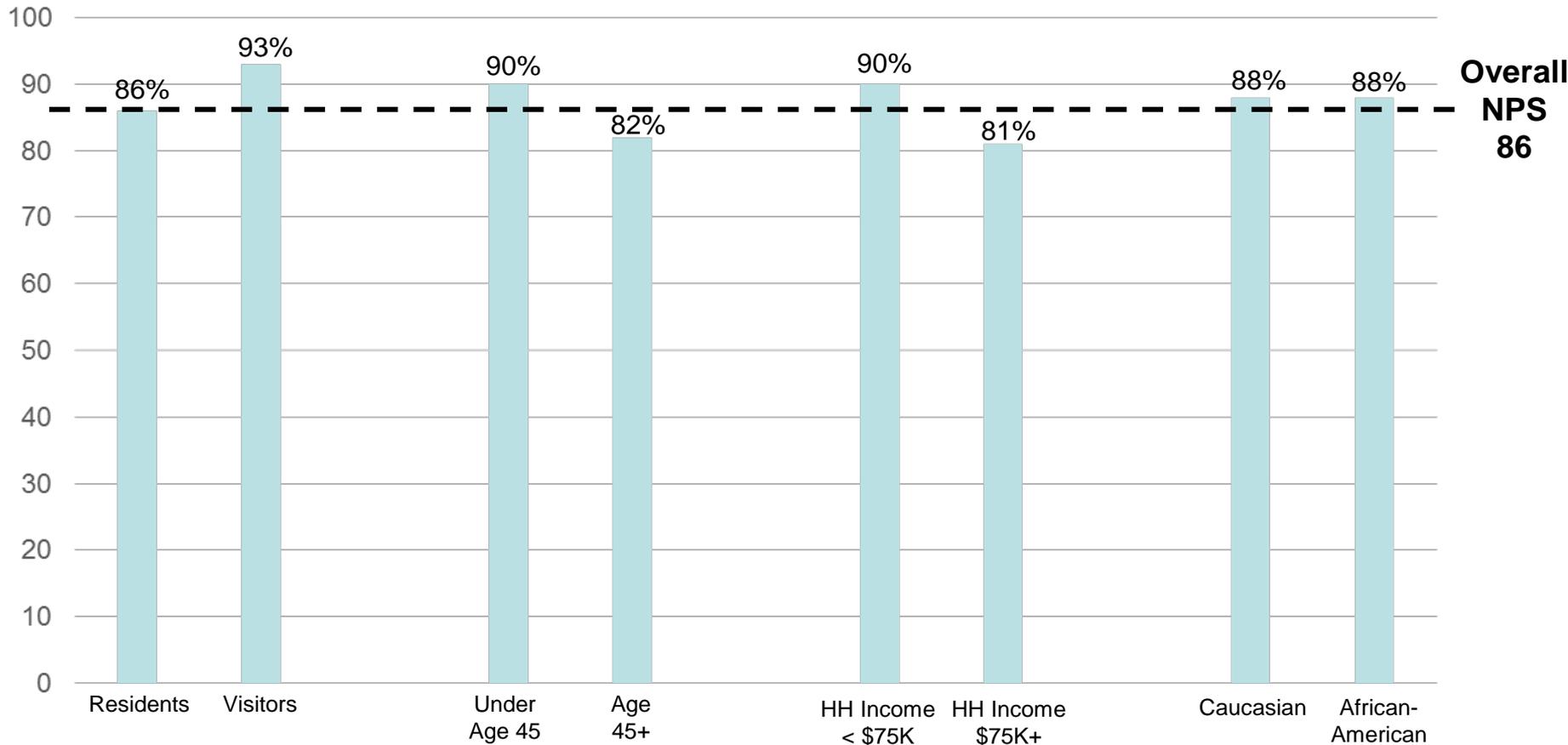


88% promoters – 2% detractors = 86NPS

Q. [IF A RESIDENT] Based on your experience in downtown Pensacola, how likely would you be to recommend that family and friends come live, work or play in downtown Pensacola, using scale of 1 – 10, where 1 means absolutely would not and 10 means absolutely would?

Q. [IF A VISITOR] Based on your experience in downtown Pensacola, how likely would you be to recommend that family and friends come and visit downtown Pensacola, using scale of 1 – 10, where 1 means absolutely would not and 10 means absolutely would?

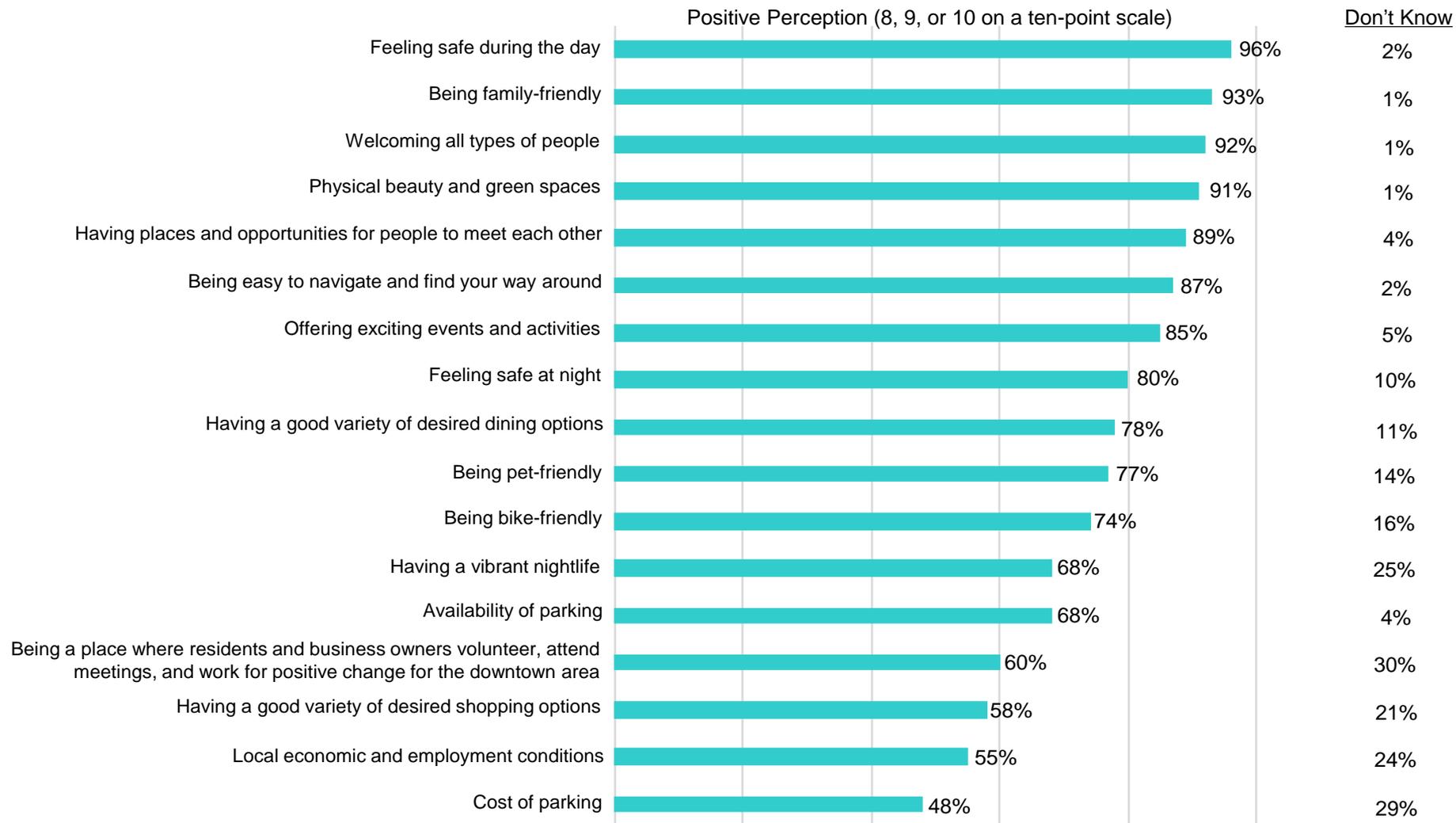
2017 Downtown Net Promoter Score



Q. [IF A RESIDENT] Based on your experience in downtown Pensacola, how likely would you be to recommend that family and friends come live, work or play in downtown Pensacola, using scale of 1 – 10, where 1 means absolutely would not and 10 means absolutely would?

Q. [IF A VISITOR] Based on your experience in downtown Pensacola, how likely would you be to recommend that family and friends come and visit downtown Pensacola, using scale of 1 – 10, where 1 means absolutely would not and 10 means absolutely would?

2017 Downtown Perceptions



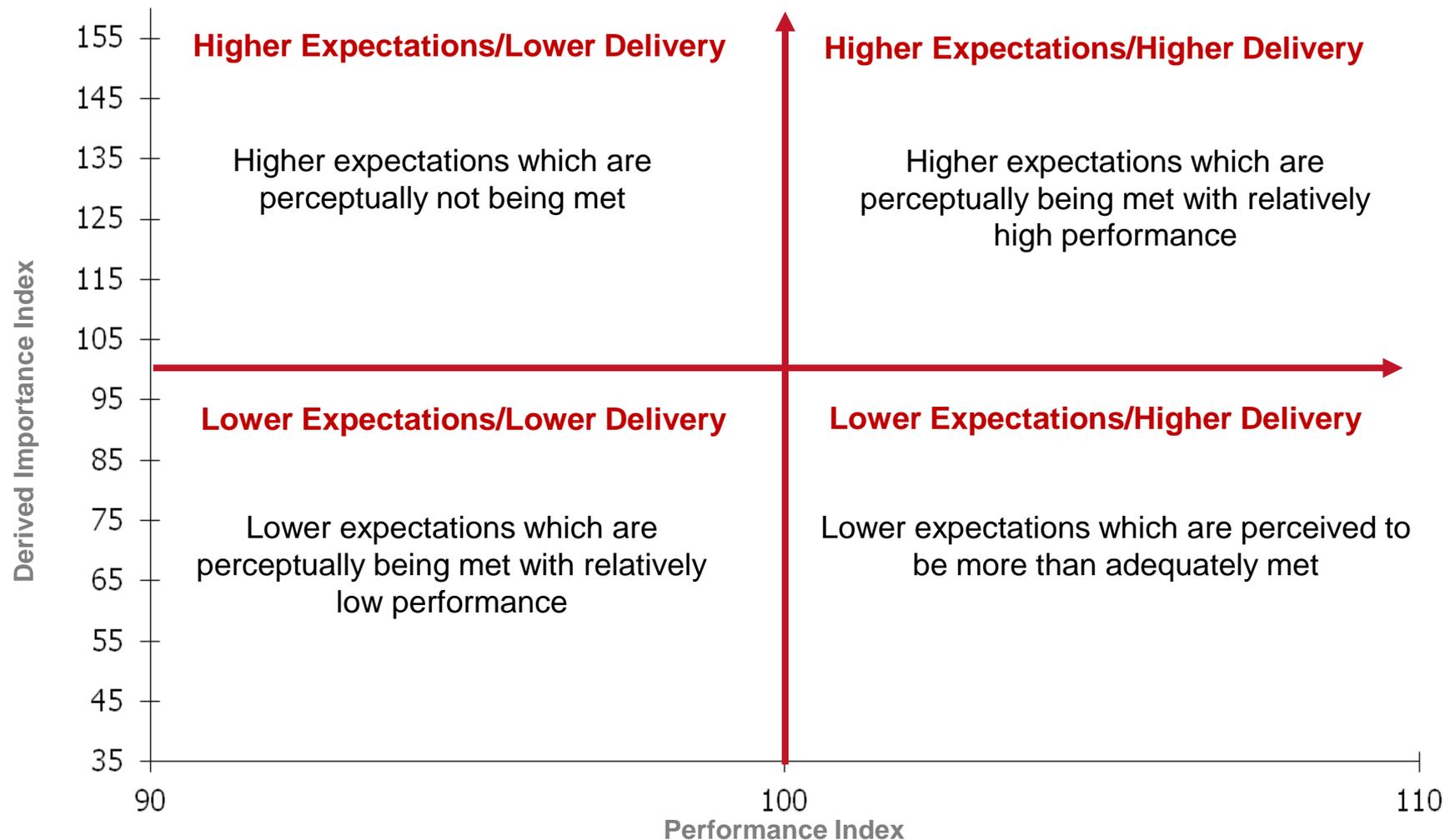
Q. Using a ten-point scale where 10 means "excellent" and 1 means "poor," how would you rate downtown Pensacola on each of the following?

Derived Importance

Derived importance is a statistical measure that relates the overall importance or influence that the individual attributes have on the overall rating or likelihood to purchase a product service or brand. The statistical procedure used to calculate Derived Importance is called the Pearson Bivariate Correlation. This procedure calculates the simple correlation coefficients between the overall rating and the attribute performance ratings. That is to say how similar each attribute rating is to the overall rating. This analysis is done on a respondent-by-respondent basis and then combined for interpretation.

Derived Importance goes beyond what respondents claim is important to them and uncovers the underlying reasons for making consumer choices. For instance, one might say that cleanliness is important in a restaurant, say that safety is important in a car, say that financial stability is important for a bank, and say that qualified physicians are important in a hospital. This does not necessarily mean that those attributes drive, or contribute, to an overall rating or purchase; in fact, we have ample evidence that this is not necessarily what determines (drives) what brand, product, or service people select. Rather, when consumers are asked how important specific attributes are, they are simply giving the 'price of entry' for the category.

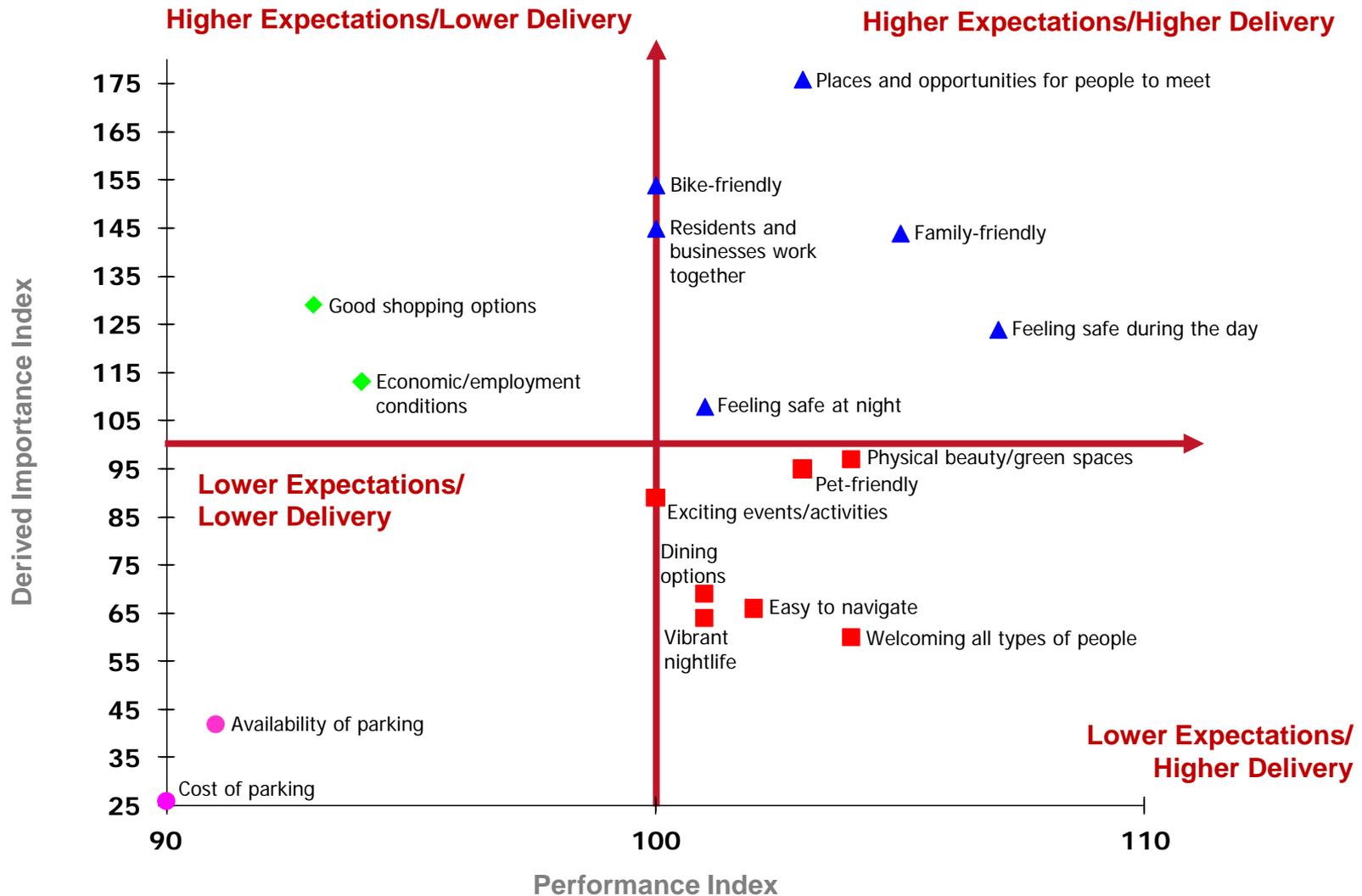
Delivery vs. Expectations Analysis



"Derived Importance" is the result of a correlation analysis that measures the relationship between the ratings of individual experience attributes (perception of Downtown Pensacola) and the area's overall Net Promoter Score. The analysis is conducted on a respondent by respondent basis and combined for interpretation.

Delivery vs. Expectations as NPS Drivers

(202 Downtown Pensacola Visitors)

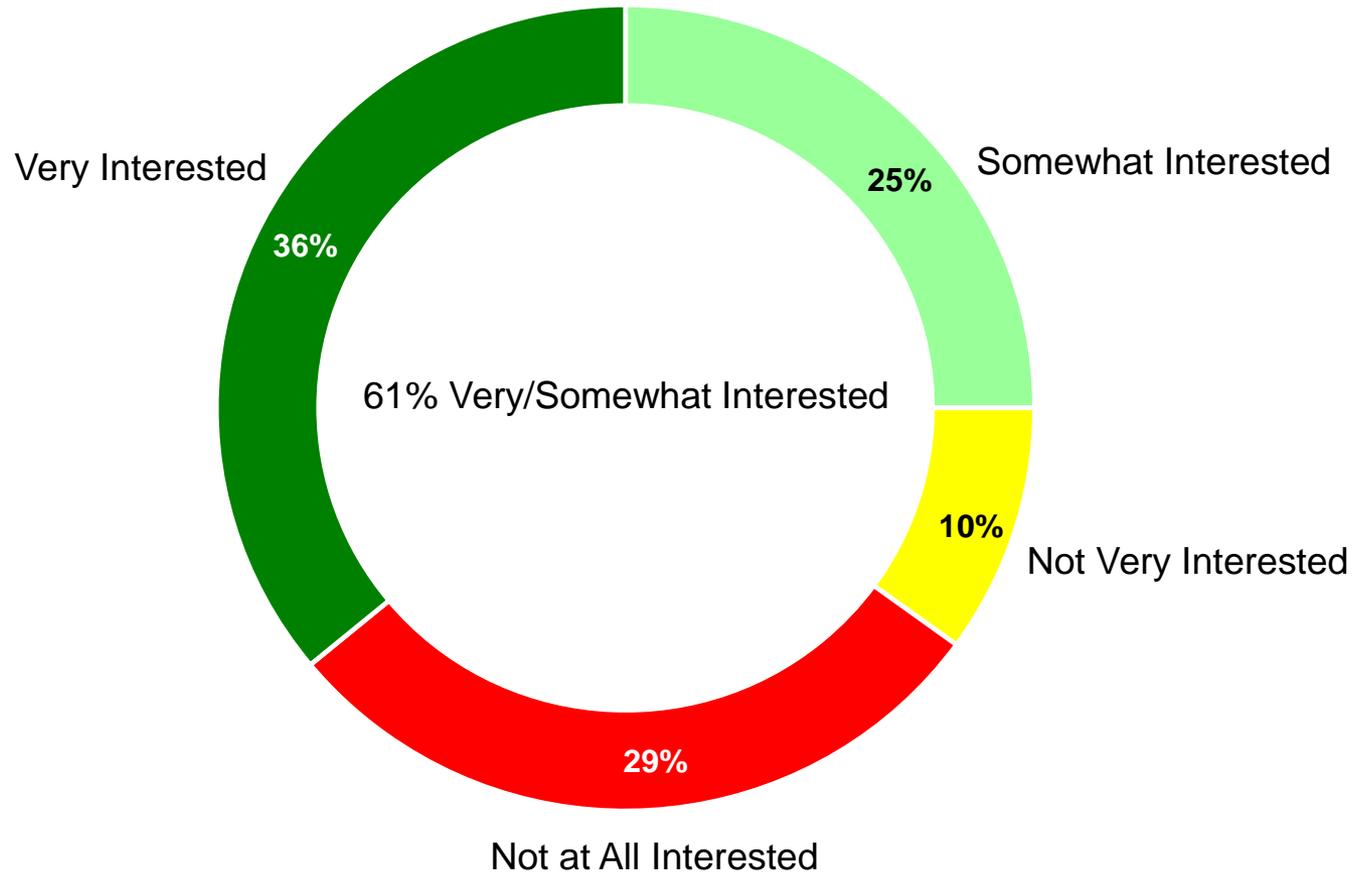


Missing from Downtown

More parking	6%	
Public restrooms	5%	
More retail shops	5%	<i>“2 major stores such as a Dillard’s or Victoria’s Secret” “Better shopping options for more mainstream clothing” “More mixed retail”</i>
Clubs (dancing, comedy)	4%	
More/different restaurants	4%	<i>“More affordable dining” “Asian restaurants” “Family dining options”</i>
More diversity/things for minorities	4%	<i>“Diversity- cultural diversity, shopping diversity, restaurant diversity, activity diversity, etc.” “More minority attractions”</i>
More bands/concerts/music	3%	
More public spaces/parks	3%	<i>“Family rest and play areas that are not off the main strip” “More parks”</i>
More activities	2%	<i>“Things for the 16 to 21 year old age group to do that are reasonably priced” “More activities to do during day besides dining” “Things to do with kids”</i>
Increased handicap accessibility	1%	
Bike trails	1%	
Nothing/Don’t know	57%	

Q. In your opinion, what, if anything, is missing from downtown Pensacola?

Interest in Bike Share



Q. How interested would you be in having bike share in downtown Pensacola (a program providing users the ability to pick up a bicycle at any self-serve bike station in the downtown area and returning it to any other bike station located within the downtown area)?

Additional Comments About Downtown

Overall love it/great place	7%	<ul style="list-style-type: none"><i>"Love my hometown"</i><i>"It's a great city"</i><i>"I love it"</i>
Like/love specific things	6%	<ul style="list-style-type: none"><i>"Love the pier"</i><i>"Locals are so friendly"</i><i>"Impressed, the area the looks like New Orleans"</i><i>"The Fish House and Gallery Night are great "</i>
It's peaceful/relaxing	2%	<ul style="list-style-type: none"><i>"Very relaxing place"</i><i>"It's comforting and relaxing"</i>
Other	9%	<ul style="list-style-type: none"><i>"Gallery night has to have a THEME every month!!!!!!"</i><i>"More pedestrian accessibility and trolley service yearly"</i><i>"We should not allow private citizens to block public access or site lines and impede business or create unsafe blind spots. Or allow business to crank up generators or equipment that degrade sound quality. Our sidewalks are not privately owned!"</i>
Nothing	75%	

Q. Is there anything else that you'd like to share about your experience in downtown Pensacola?

For Additional Information Contact:

MAJORITY OPINION
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6010 Georgetown Park Drive
Norcross, Georgia 30071

1-877-5-ASK-MOR
www.majorityopinionresearch.com

