

## Background + Objective

The Port is exploring additional advertising revenue from building wraps. In preparation for a future board meeting, the Port conducted research with the public across two separate timeframes to evaluate sentiment towards the building wraps among San Diego residents and visitors.

## Methodology

Phase I: n=202, Comic-Con Weekend (July 22-23, 2017)

Phase II: n=202, No Special Events (August 8-14, 2017)

Intercepts; interviewer-administered 5-min questionnaire

## Key Findings

### ACROSS BOTH PHASES, BUILDING WRAPS ARE WELL-RECEIVED

More than 3 out of 4 respondents like building wrap advertising. They feel it is fun, vibrant and attention getting. Combining phases reveals that the level of appeal slightly increases among city residents.

#### "Like" Building Wraps (T2B, n=404)



### LESS THAN 2% STATE BUILDING WRAPS "SHOULD NOT BE ALLOWED AT ALL"

Across Phase I and Phase II, the majority of respondents are open to wrap advertising at least a portion of the year.

<2%

"Do Not Allow Wraps At All" (n=404)

### VERSUS OTHER METRICS, WRAPS AREN'T AS STRONGLY CORRELATED WITH SD

TB agreement with building wraps being "consistent with San Diego's image" scores more than 10 points below the other attributes tested across all age and residency breakouts.

Additionally, 18% (average Phase I & Phase II B2B) disagree with an "image fit" stating that San Diego *already has too much advertising* or is *too much of a small, simple city* to support a lot of ads.

*"(Building wraps) make you feel like something is going on. Like there is something to be excited about."*

- Brandon, 25-34y, San Diego City

*"(The building wraps are) colorful and makes it look pretty and it's informative. It's good advertising for businesses."*

-Lola, 45-54y, San Diego County

*"San Diego is a small town, it shouldn't have too much going on."*

- Sue, 45-54y, Visitor

## Recommended Next Steps

While the majority of San Diego resident and visitor respondents find building wrap advertising appealing, the team recommends conducting additional research throughout the Building Wrap Pilot Program leveraging actual advertising stimuli to help evaluate reception in real-time. Specific recommended steps include:

- Establish KPIs (including public / people metrics) for the Pilot Program
- Conduct research with the public / people (which aligns with established KPIs) during the pilot period using actual building wraps as stimuli
- Leveraging the Advertising Team's Building Wrap Pilot Program Summary, conduct consumer research to identify the acceptance of building wraps (based solely on size and placement) across specific locations / areas / buildings within the proposed sign district
- Further explore the public / people's reaction to less mainstream wrap advertising (alcohol, marijuana, etc.) in order to better understand content vs. medium and identify thresholds

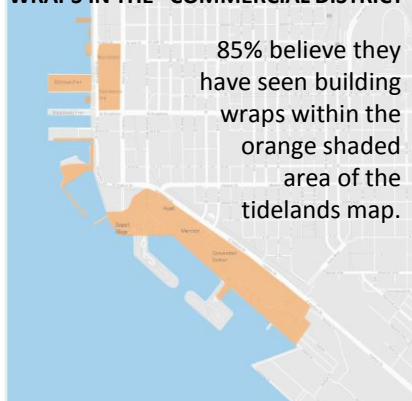


July 20-23, 2017 (Comic-Con)



## Phase II Key Findings

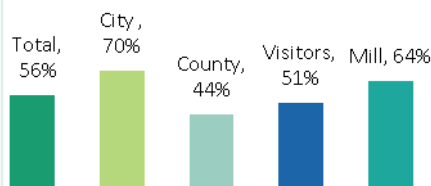
### MOST RECALL PREVIOUSLY SEEING WRAPS IN THE "COMMERCIAL DISTRICT"



### OVER HALF OF RESPONDENTS WOULD LIKE TO ALLOW WRAPS AT ALL TIMES

And even more City Residents (70%) and Millennials (64%) feel the same.

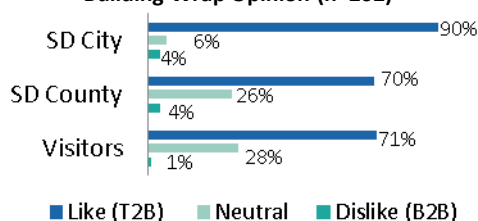
#### Yes, Allow Wraps at All Times (n=202)



### PARTICIPANTS, ESPECIALLY CITY RESIDENTS, ARE EXTREMELY POSITIVE TOWARDS THE WRAPS

78% (T2B) of all Phase II respondents like building wraps. City residents are even more positive with 90% stating they are appealing.

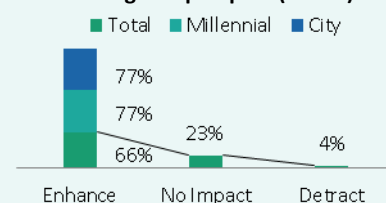
#### Building Wrap Opinion (n=202)



### NEARLY 7 OUT OF 10 FEEL THE ADS WOULD ENHANCE THEIR SD EXPERIENCE

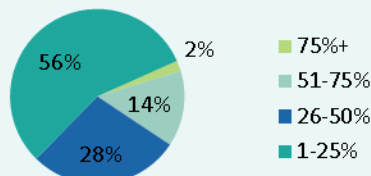
Because they are "colorful" and "convey excitement", the majority, especially city-dwellers and Millennials, feel wraps would enhance their time in San Diego.

#### Building Wrap Impact (n=202)



### 1-25% IS THE PREFERRED AMOUNT OF TIME FOR THOSE THAT WANT TO ALLOW WRAPS ONLY PART OF THE YEAR

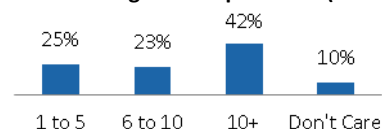
#### % of the Year to Allow Wraps (n=64)



### OF THOSE THAT WOULD LIKE TO SEE WRAPS DISPLAYED AT LEAST PART OF THE YEAR, OVER 4 OUT OF 10 FEEL THERE SHOULD NOT BE A LIMIT ON THE NUMBER OF BUILDINGS THAT DISPLAY ADS AT ONE TIME

Ultimately, more than ¼ of those that approve of the ads are open to wrapping up to 6 buildings

#### # of Buildings to Wrap at Once (n=178)



## Phase II Insights

Building wraps have near universal awareness and appeal. Nearly everyone likes them and feels they should be allowed within the shaded orange "Commercial District."

Millennials, downtown residents and residents of the City of San Diego are overwhelmingly positive towards the building wraps. Just under three out of four of these residents feel the wraps should be allowed at all times and half feel they should be allowed on 10 or more buildings at once. Overall, they feel wraps are fun, vibrant and attention getting and add to the city experience.

### Study Name

Building Wrap Research  
Phase II: No Special Events

### Base

N=202 [n=52 Downtown; n=25 SD City; n=50 SD County; n=75 Visitors]  
50% Millennials  
Mix of gender, age & ethnicity

### Methodology

5m Survey Intercepts near SDCC

### Dates

August 8-14, 2017 (Mix of day-parts)





# Comic-Con Building Wrap Research

Luth Research

July 2017



# 1

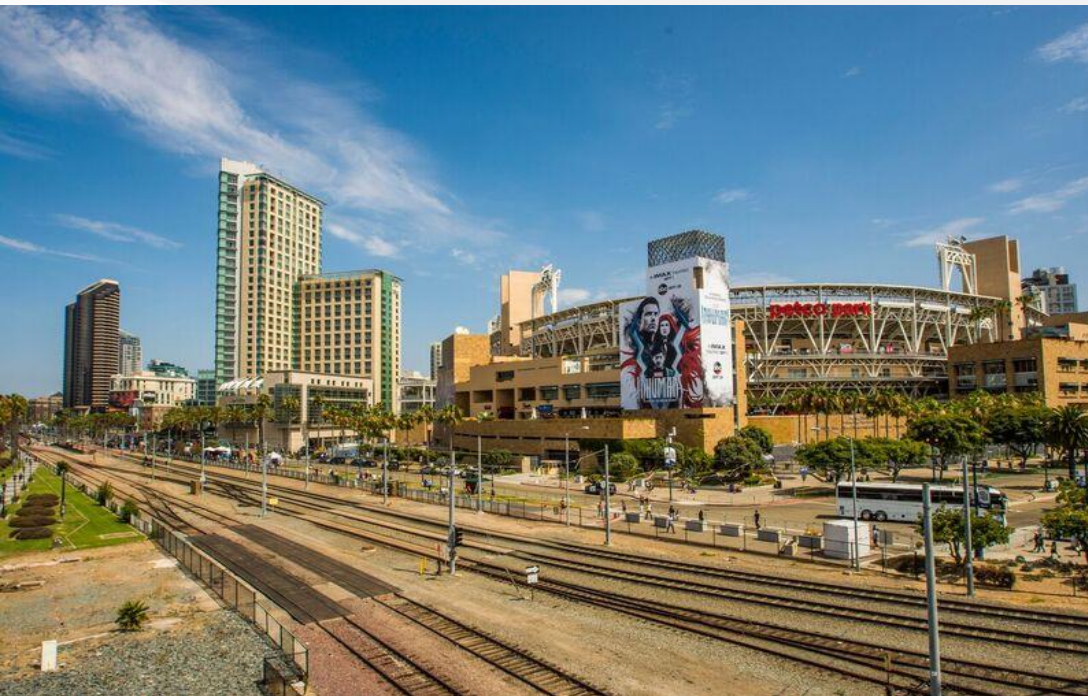
## Objectives & Methodology





**The objective of this research was to get the reaction to the building wraps during Comic-Con from both San Diego residents and tourists. Specifically:**

- Obtain awareness and overall opinion toward the building wraps
- Understand the relevance to the Comic-Con experience
- Obtain intent to see more or less in the future
- Understand the type of content that is most appealing



**In-person intercepts were conducted:**

- N = 200 in total; 100 SD residents and 100 tourists
- Self –administered 5 minute questionnaire
- Mix of gender, age and ethnicity from the areas interviewed
- Conducted during Comic-Con; July 20 – 23, 2017

# 2

## Summary





# Summary of Results

**Both residents and tourists like the building wraps and feel they contribute to a fun experience at Comic-Con.**

- Nearly everyone noticed them and felt they are very attention getting
- Most people are either fine with the current number of building wraps or would like to see more in the future
- About half would also like to see local businesses advertised and one third would like to see wraps for craft beers
- Over one half of the people feel the building wraps should be allowed on all buildings during big events and an additional one in five feel they should be allowed at all times.

**Only one in four people feel the building wraps are consistent with San Diego's image.**

- Since all other information is very positive, any future research should investigate why the wraps are inconsistent with SD's image e.g., do they enhance the image, detract from it or represent a change in some other way.





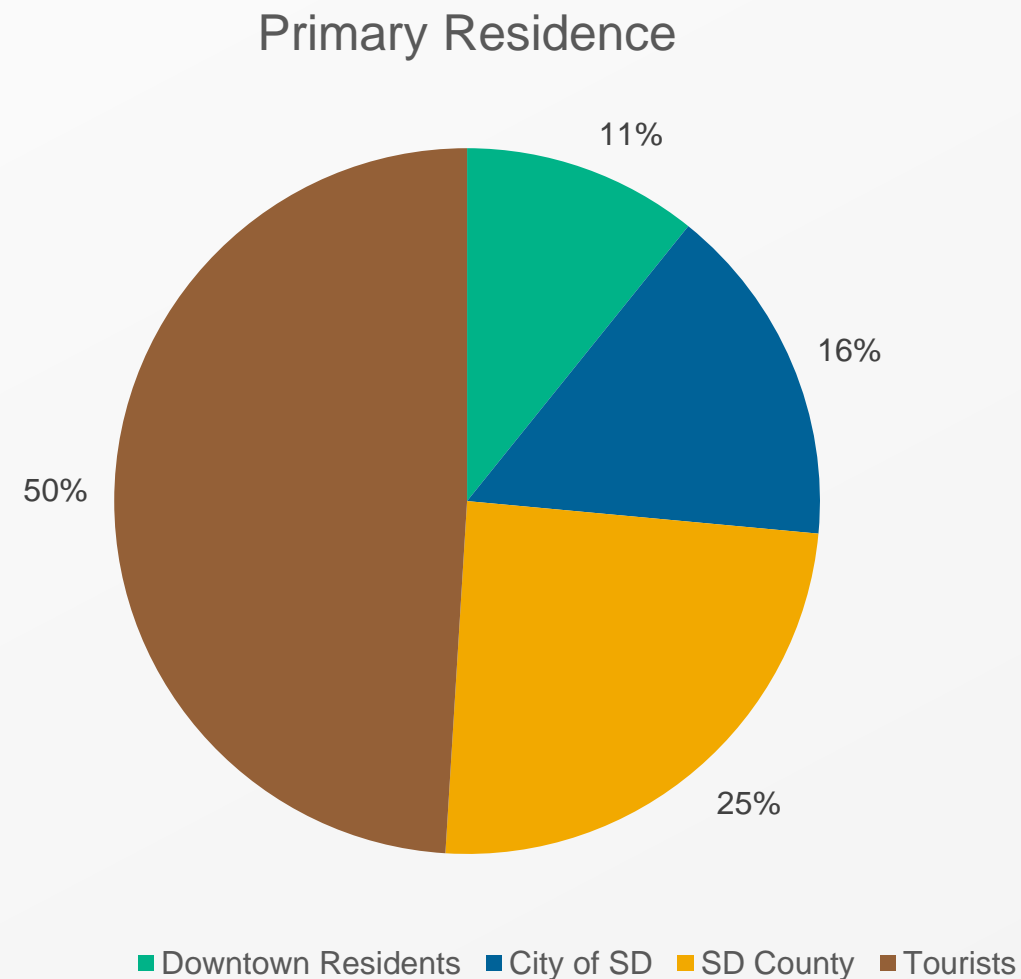
3

## Key Findings



# Primary Residence

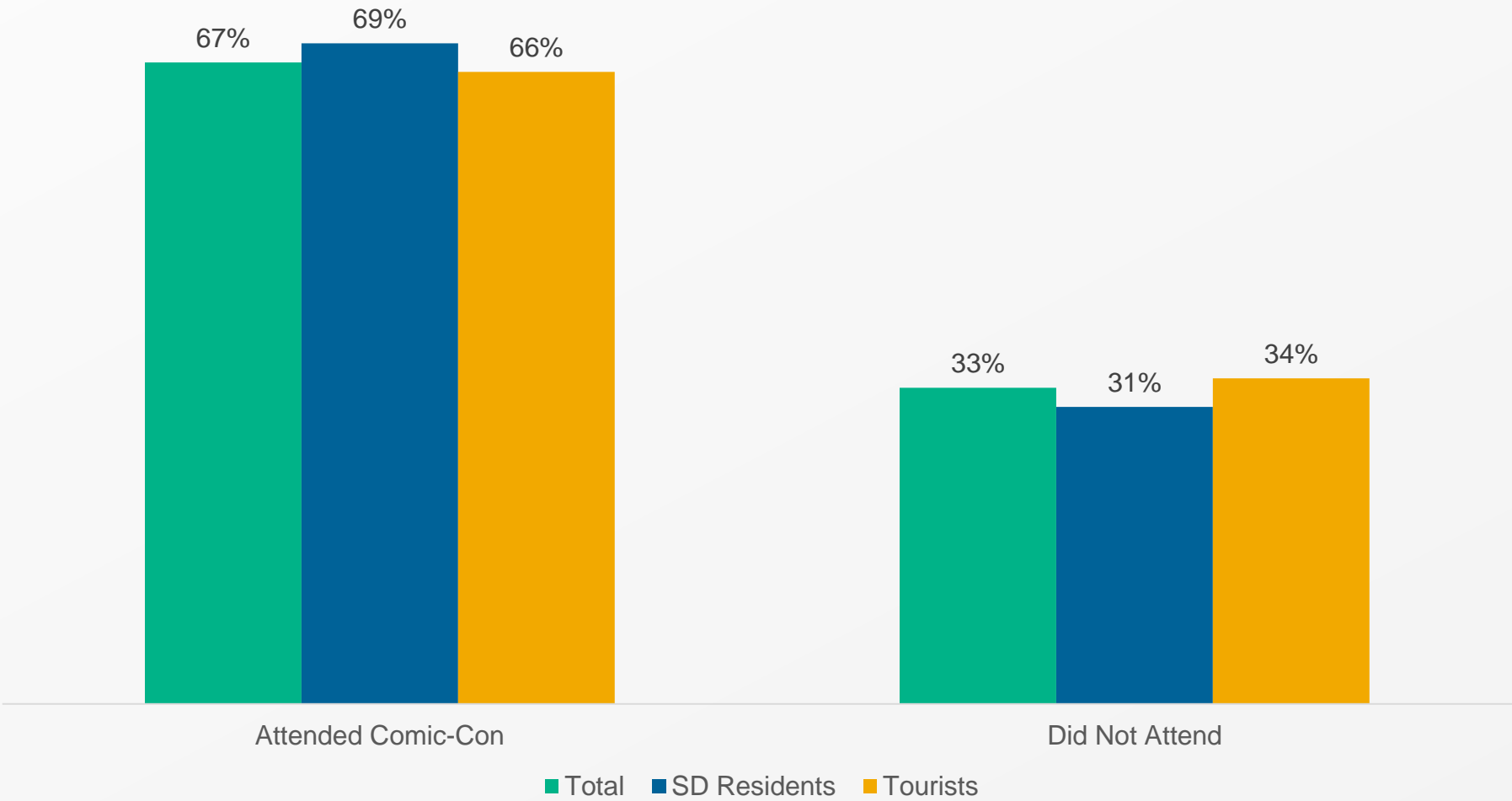
Both tourists and local San Diego residents participated in this survey. Locals include residents of the immediate downtown area and both the city and county of San Diego.





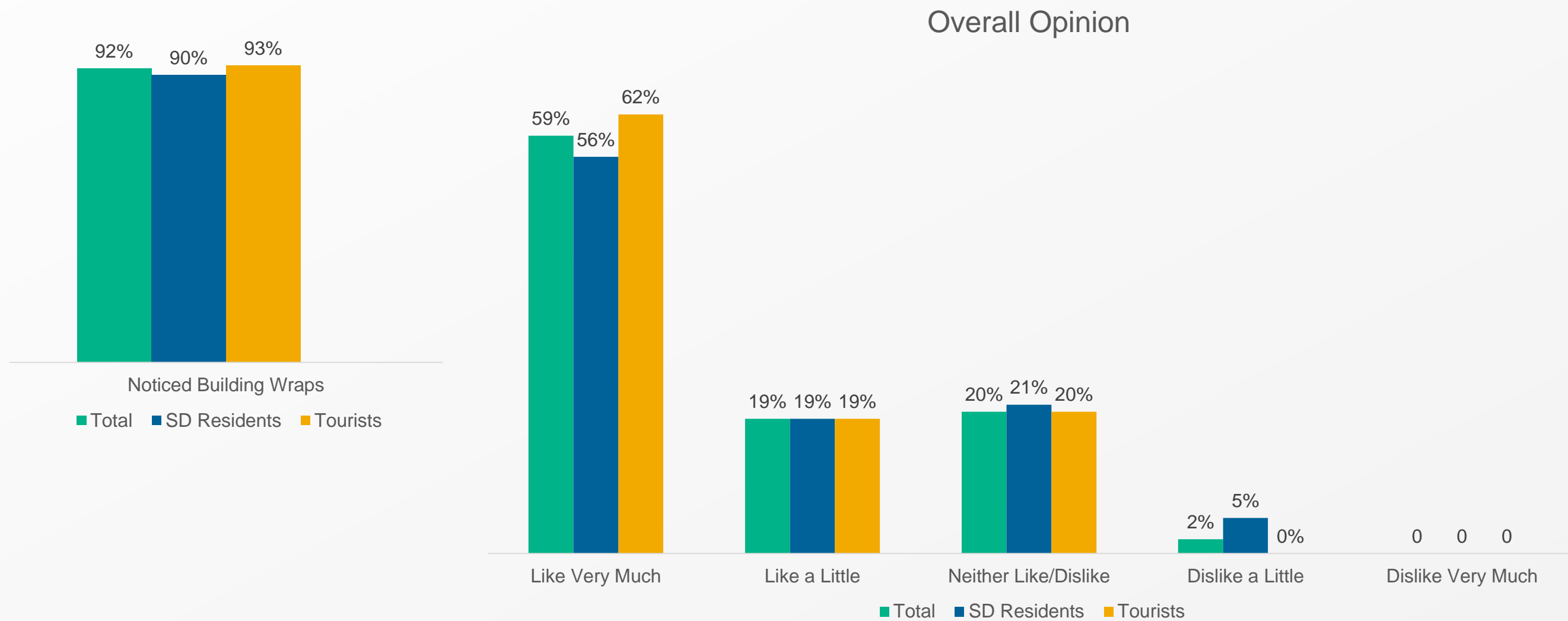
# Comic-Con Attendance

Approximately two out of three tourists and San Diegans were in town to attend Comic-Con.



# Overall Opinion of Building Wraps

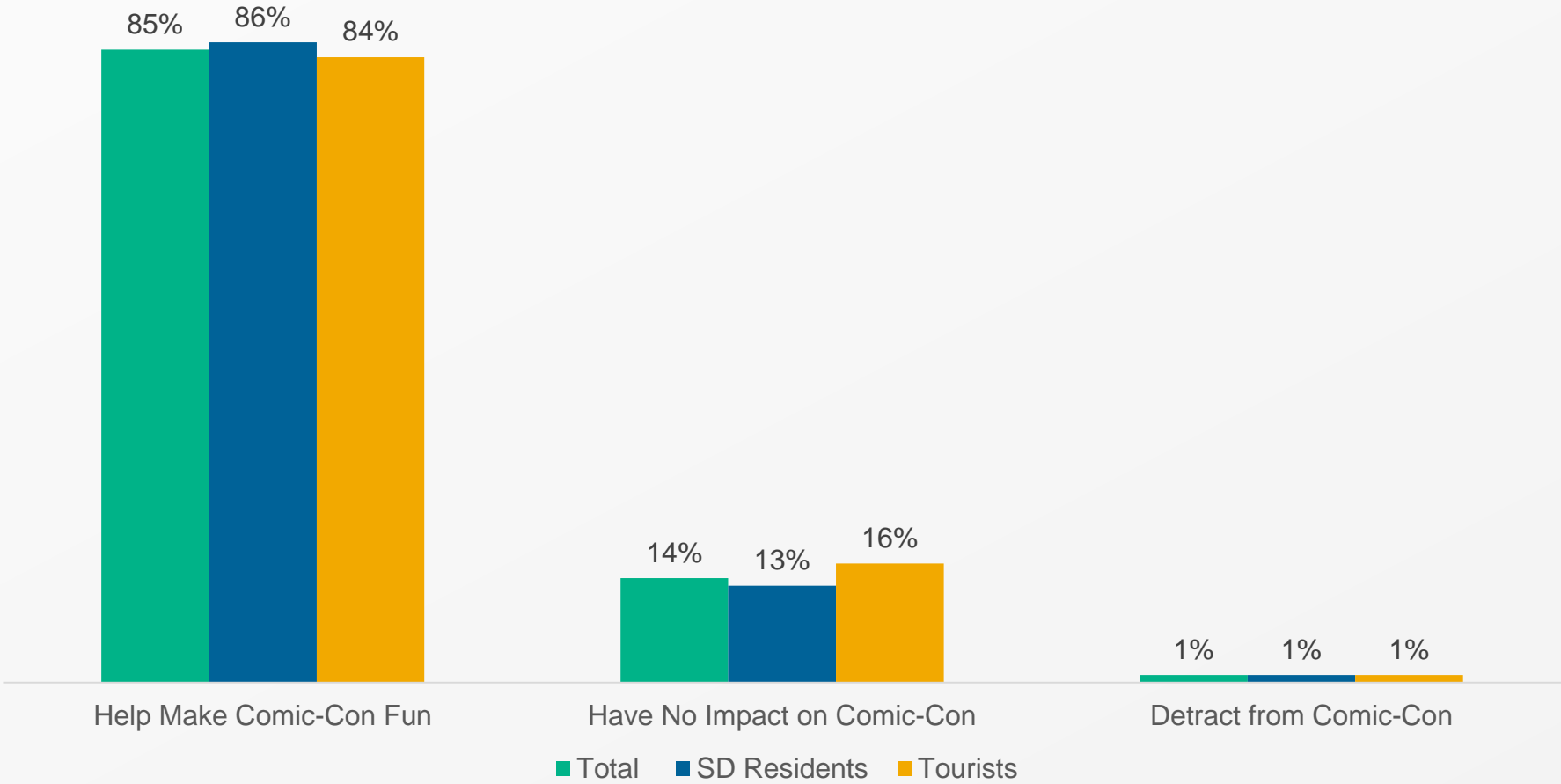
Nearly everyone noticed the building wraps and the majority of people say they like them very much. There are a few locals who do not like them.





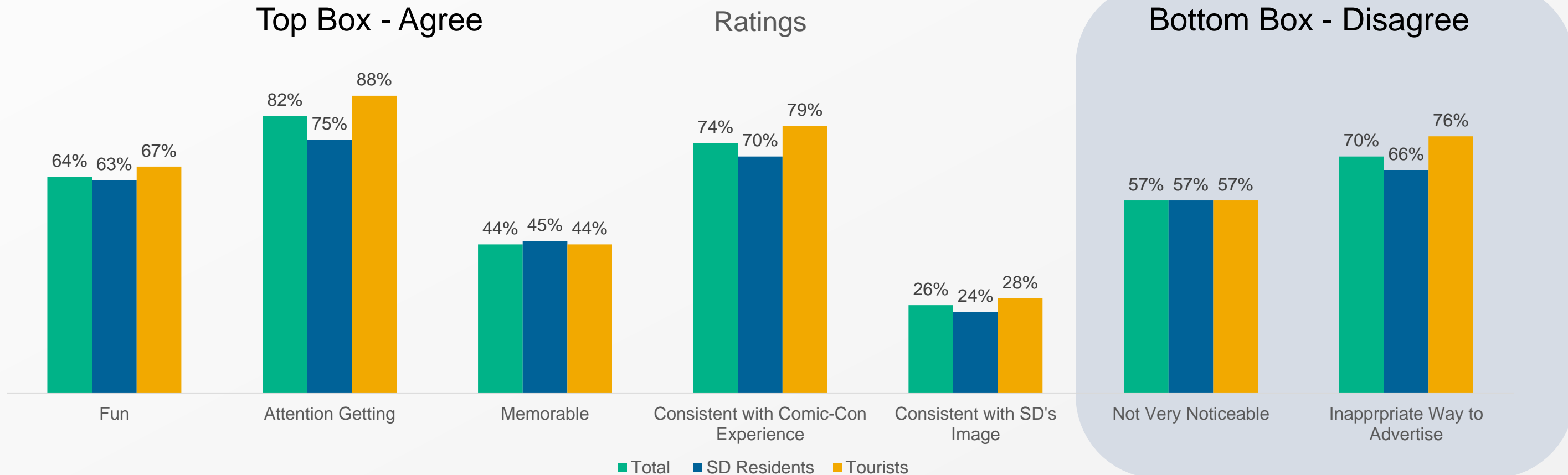
# Contribution to Comic-Con Experience

Nearly everyone feels that the building wraps contribute to the Comic-Con experience and help to make it fun.



# Building Wrap Ratings

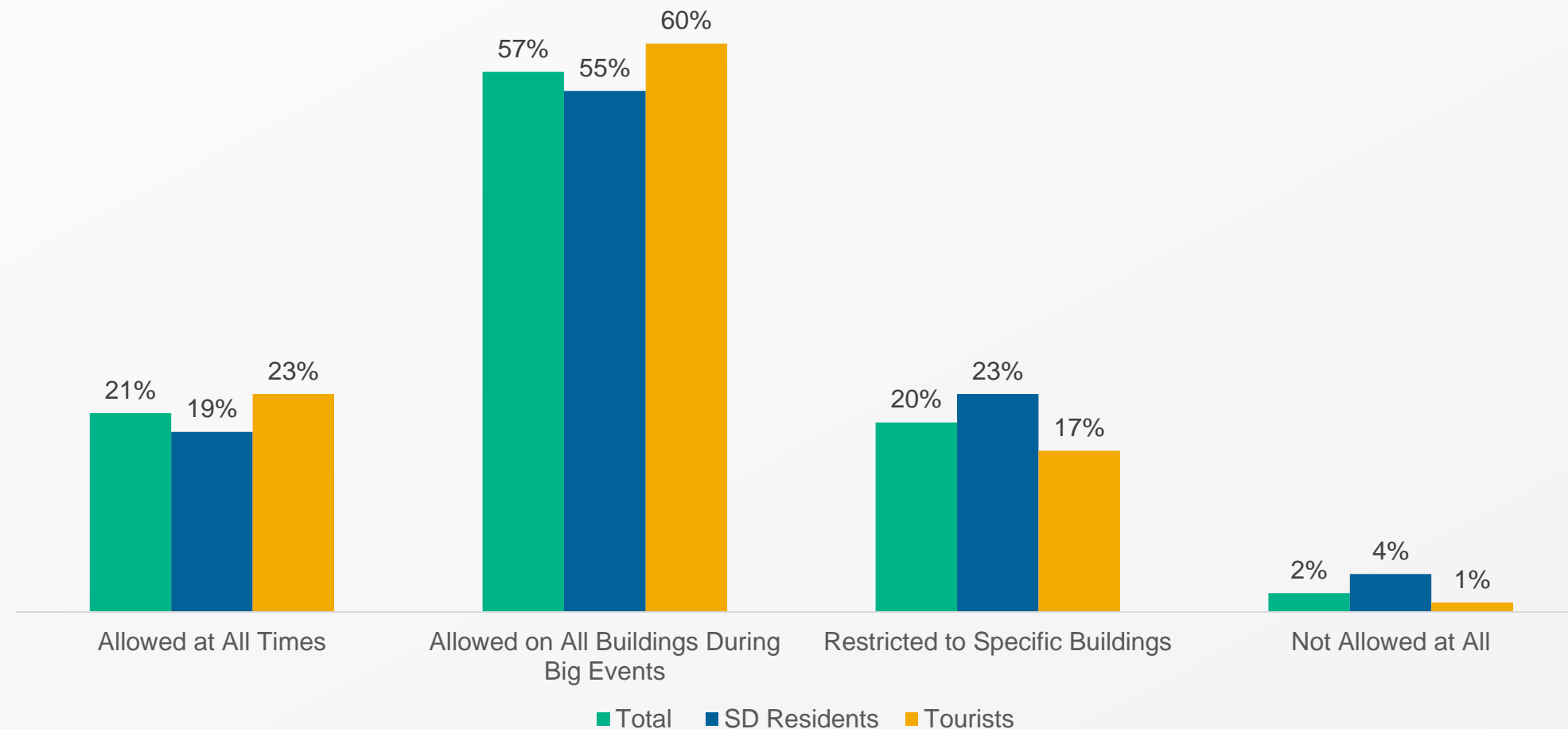
The building wraps are rated higher for being “Attention Getting”, “Being Consistent with the Comic-Con experience” and “Fun”. Only one in four agree that the building wraps are “Consistent with San Diego’s Image”.





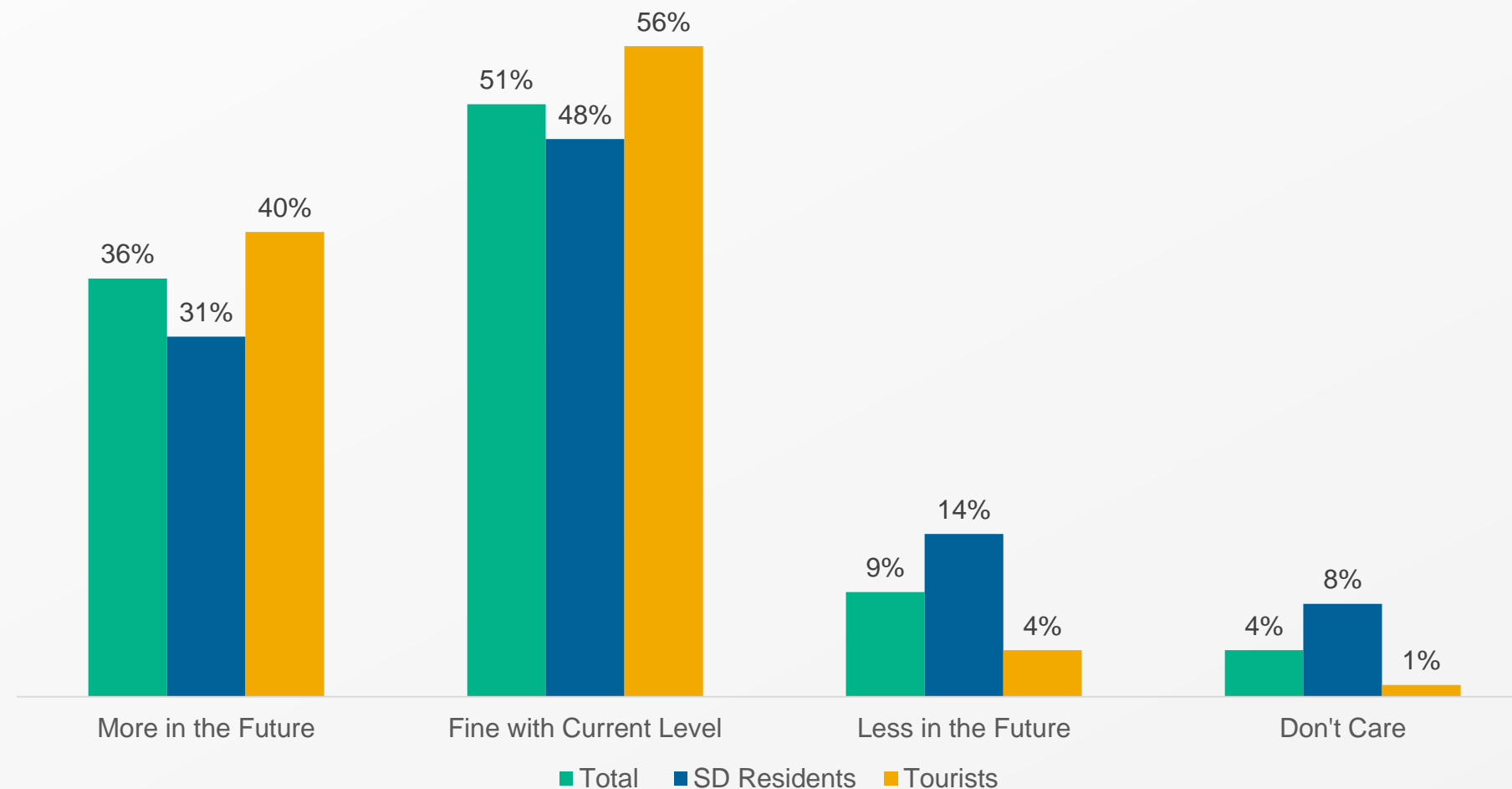
# General Feelings Toward Building Wraps

People are somewhat split on this question with over half feeling the building wraps should be allowed on all buildings during big events downtown. About one in four people feel they should be allowed at all times, while a similar number of people feel building wraps should be restricted to specific buildings.



# Level of Future Building Wraps

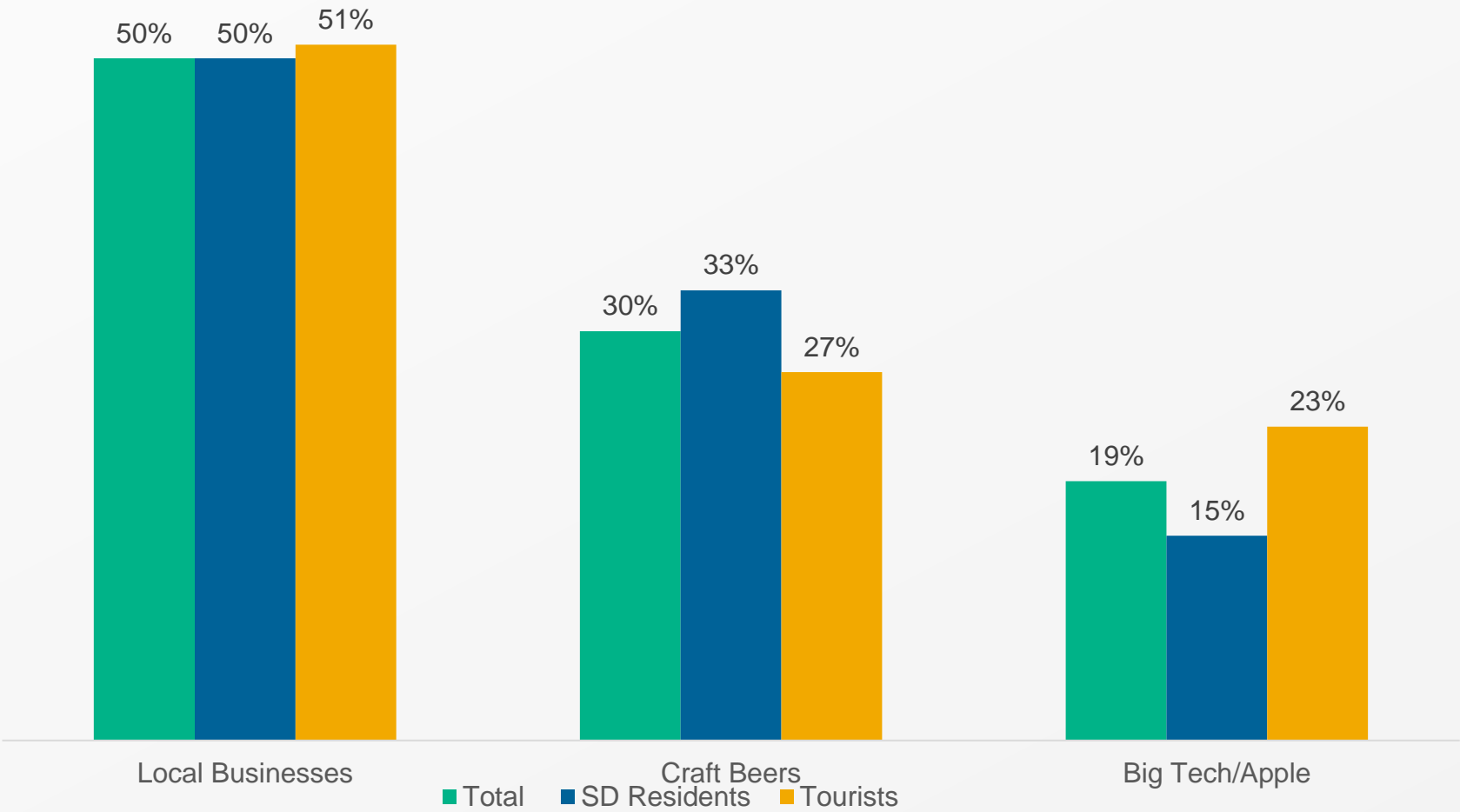
The majority of people are either fine with the current number of building wraps they see or would like to see even more in the future.





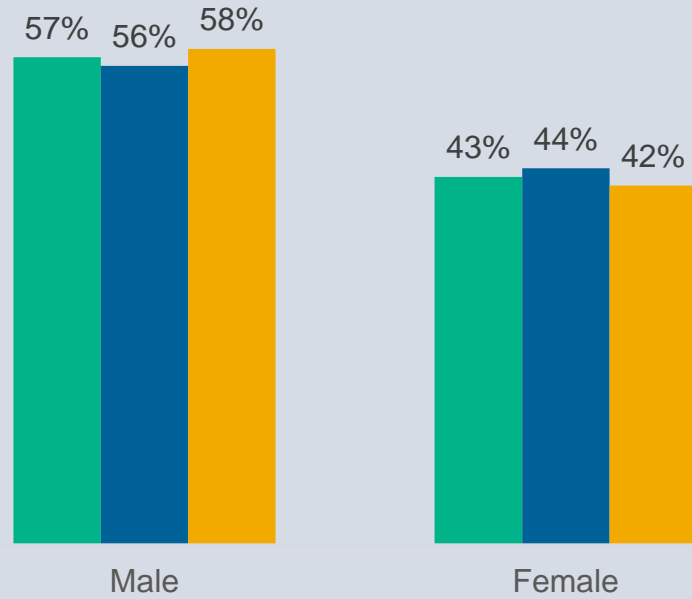
# Appropriate Future Ads

Local Businesses are the leading advertisers that people would like to see on building wraps in the future, followed by craft beers and high tech companies.

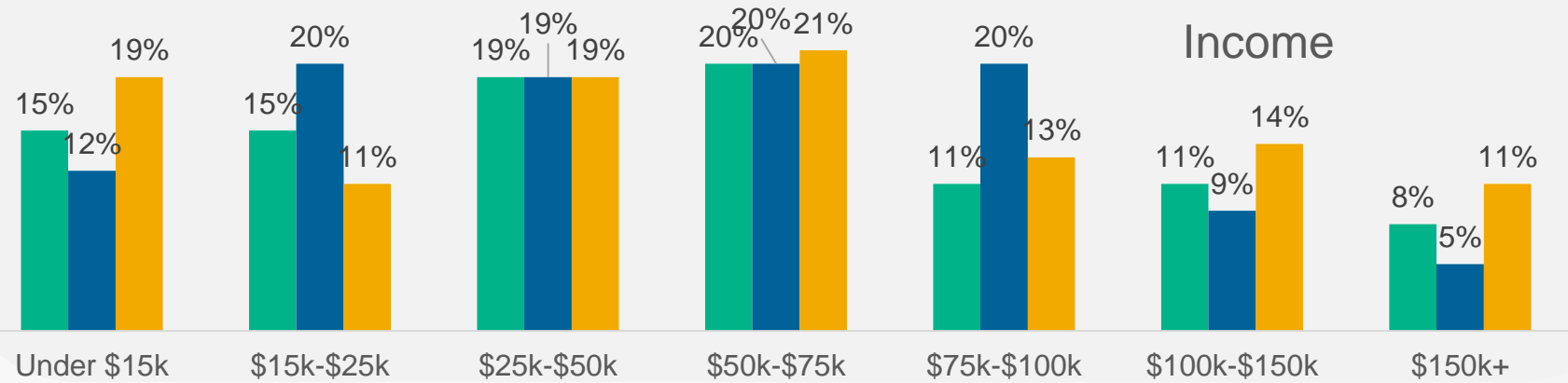


# Demographics

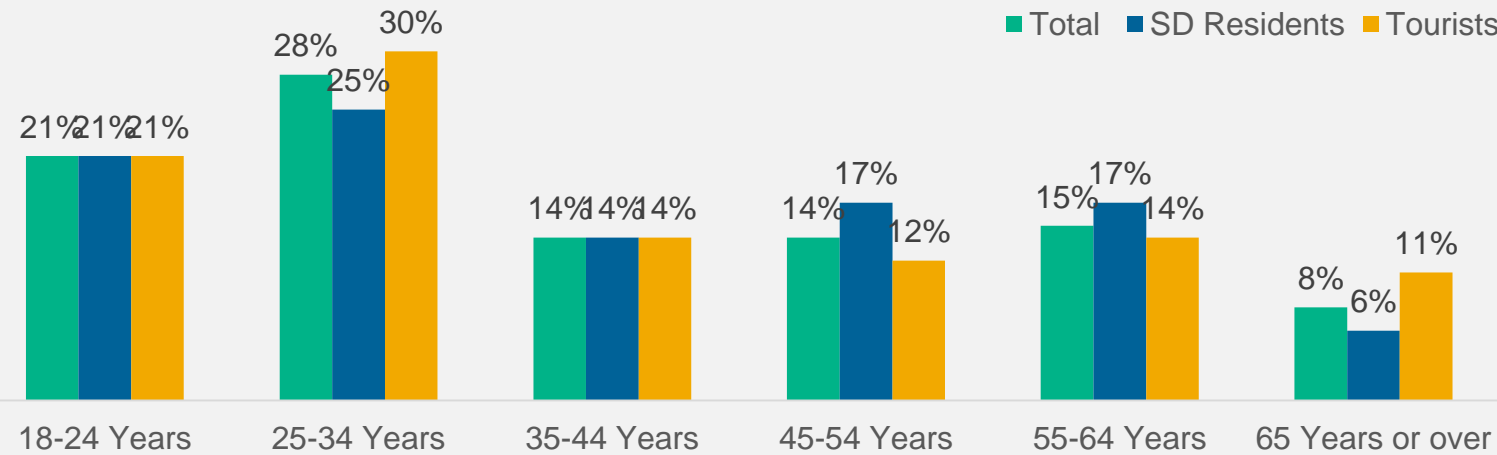
## Gender



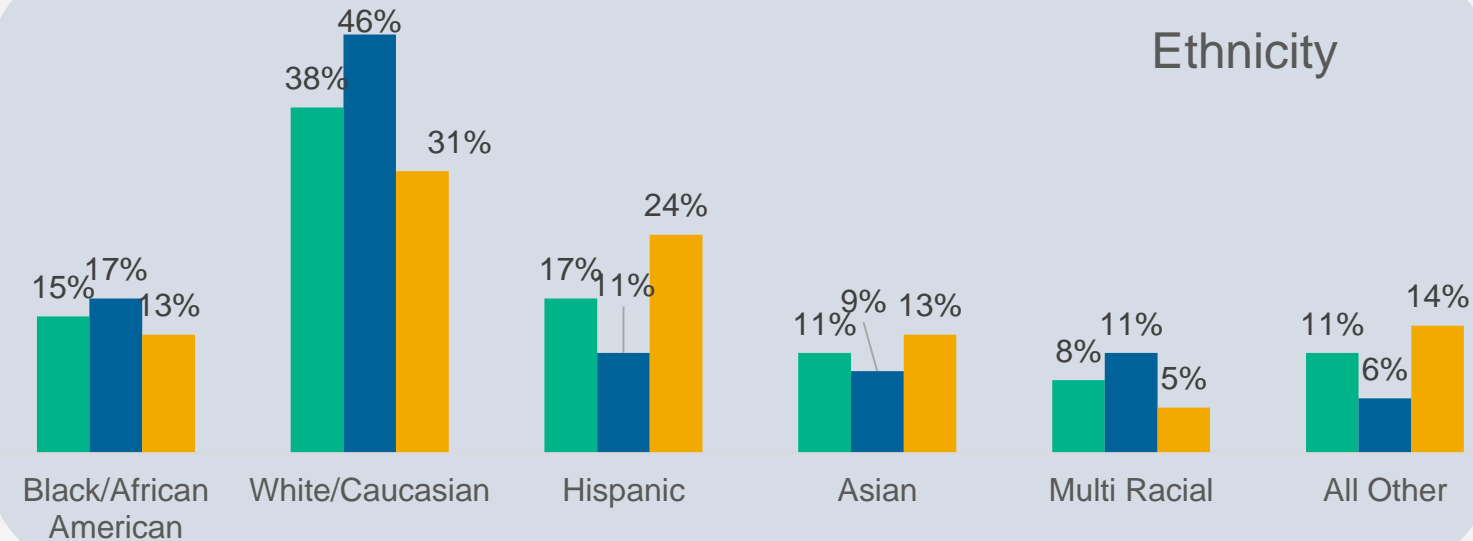
## Income



■ Total ■ SD Residents ■ Tourists



## Ethnicity





# Building Wrap 2 Research

Luth Research

August 2017





# 1

## Objectives & Methodology



**The objective of this research was to follow up the Comic-Con research with a broader based sample group and time frame to better understand reactions to the building wraps. Specifically:**

- Obtain awareness and overall opinion toward the building wraps
- Understand the relevance to the downtown San Diego area experience
- Obtain intent to see more or less in the future
- Understand the type of content that is most appealing

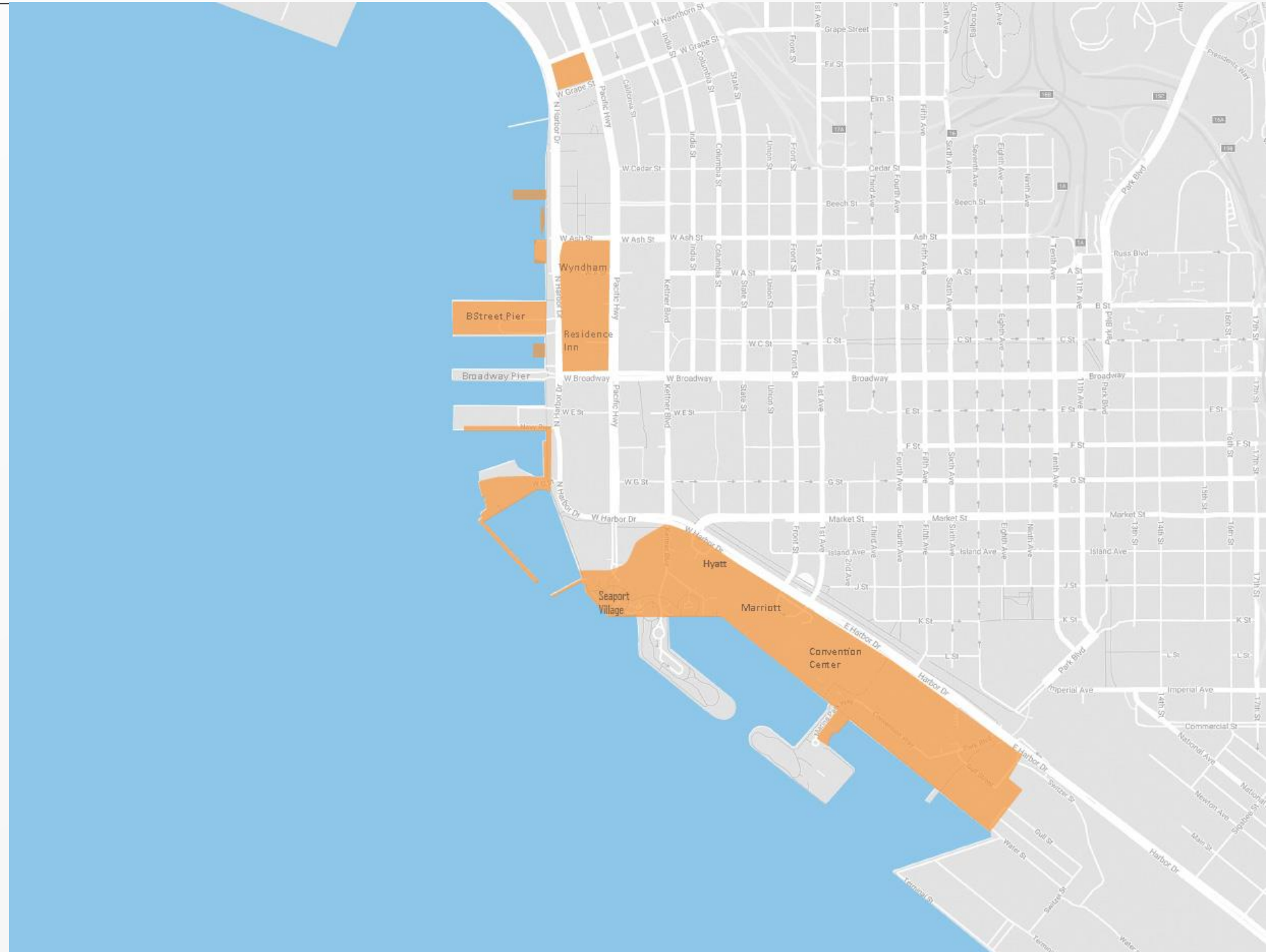


## **In-person intercepts were conducted:**

- N = 202 in total;
  - 52 downtown, 77 SD City, 50 SD County and 75 tourists
- 101 Millennials; 101 Non-Millennials
- Interviewer –administered 5 minute questionnaire
- Mix of gender, age and ethnicity from the areas interviewed
- Conducted August 8 – 14, 2017 during a mix of day-parts

# Materials Used

**This map was shown to respondents who were then told to focus on downtown San Diego buildings located in the shaded area.**





# 2

## Summary



# Summary of Results

**The building wraps have near universal awareness, even among Tourists. Nearly everyone likes them and feels they should be allowed in the areas questioned about.**

- Downtown residents and residents of the City of San Diego are overwhelmingly positive towards the building wraps.
  - Three out of four of these residents feel the wraps should be allowed at all times and one half feel they should be allowed on 10 or more buildings at a time.
  - They feel wraps are fun, vibrant and attention getting.
- San Diego County residents and Tourists are generally positive or lukewarm toward the wraps.
  - One in four neither like nor dislike the wraps and one third of tourists feel they have no impact on the San Diego experience.
  - One in three Tourists and County residents feel the wraps should be allowed, but not at all times, and should be limited to under 10 buildings at a time.
- Millennials are generally more positive toward building wraps than non-Millennials.





# 3

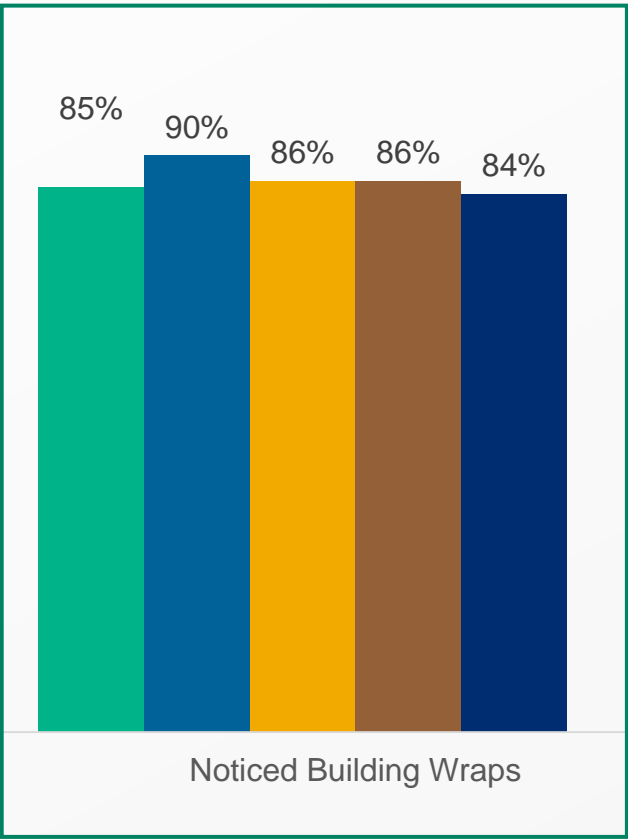
## Key Findings



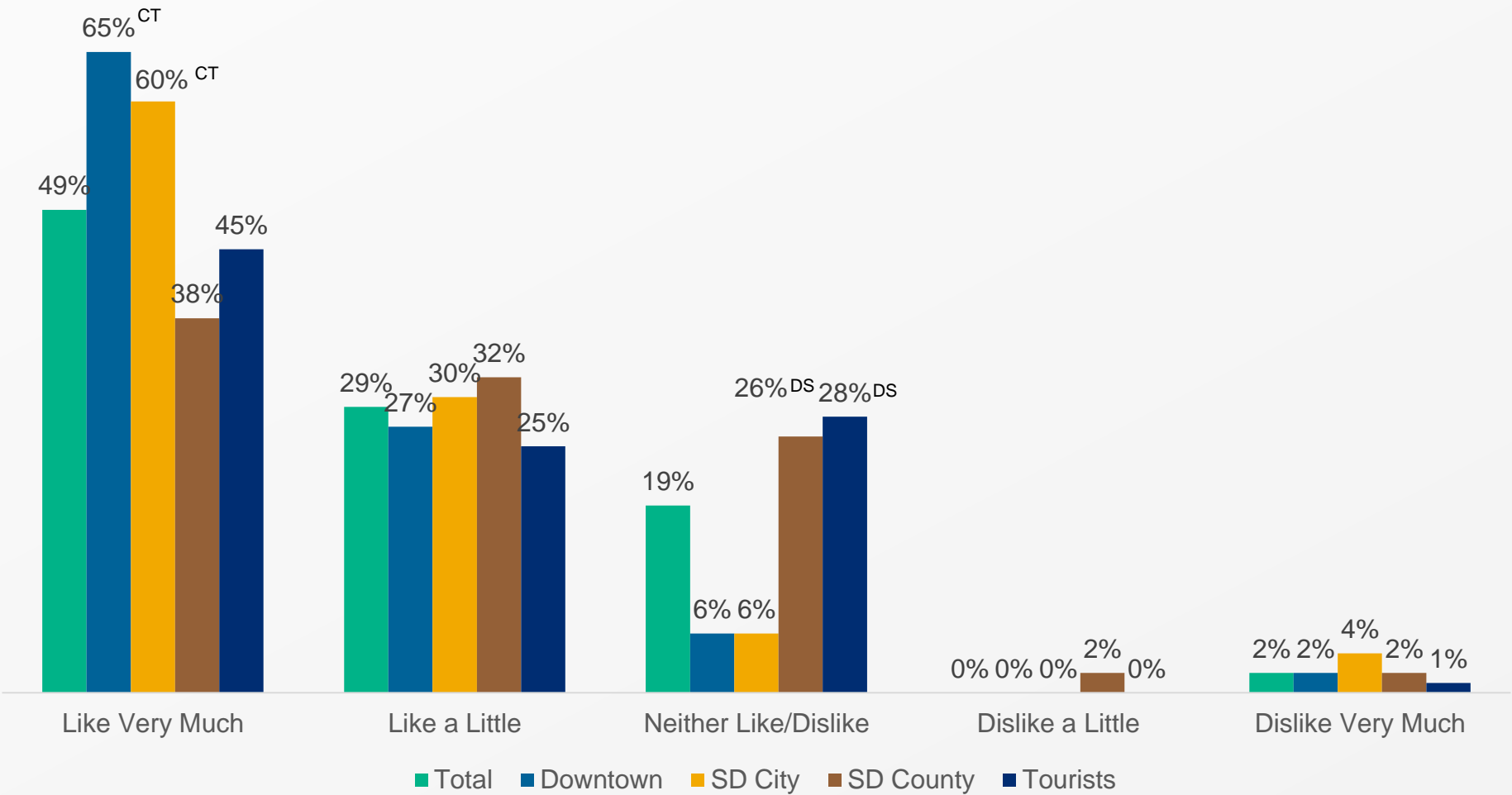


# Overall Opinion of Building Wraps

Nearly everyone has seen building wraps in the shaded area queried. Most people like the building wraps with downtown residents liking them far more than SD County residents and Tourists. Few dislike them.



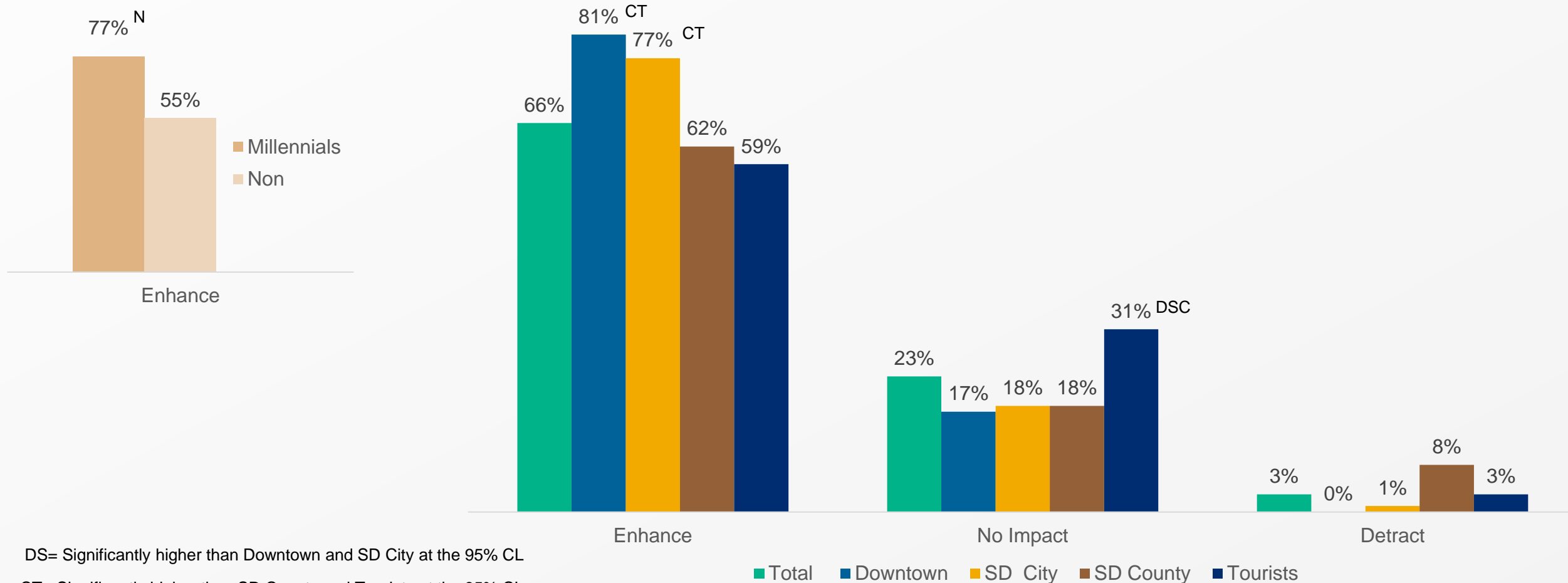
Overall Opinion



DS= Significantly higher than Downtown and SD City at the 95% CL  
CT= Significantly higher than SD County and Tourists at the 95% CL

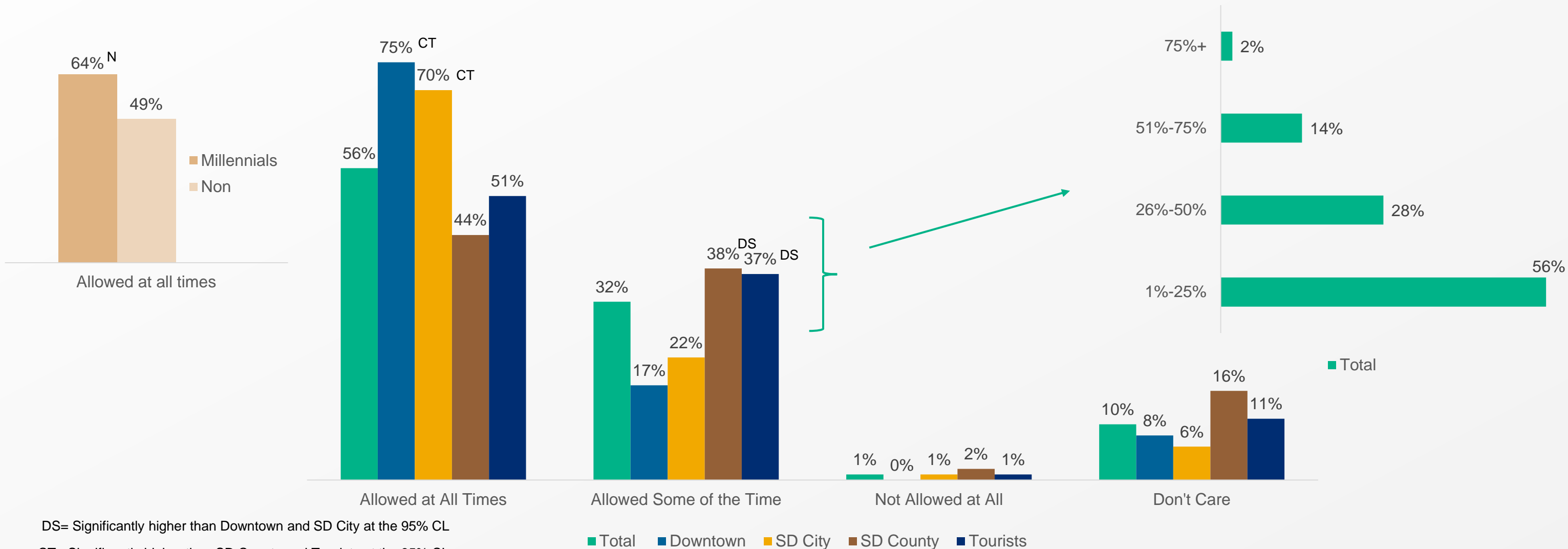
# Contribution to San Diego Experience

The majority of people, especially Downtown and City residents, feel that building wraps enhance their San Diego experience. Tourists are most likely to feel they have no impact on their experience. Millennials are more likely than non-Millennials to feel they enhance their experience.



# General Feelings Toward Building Wraps

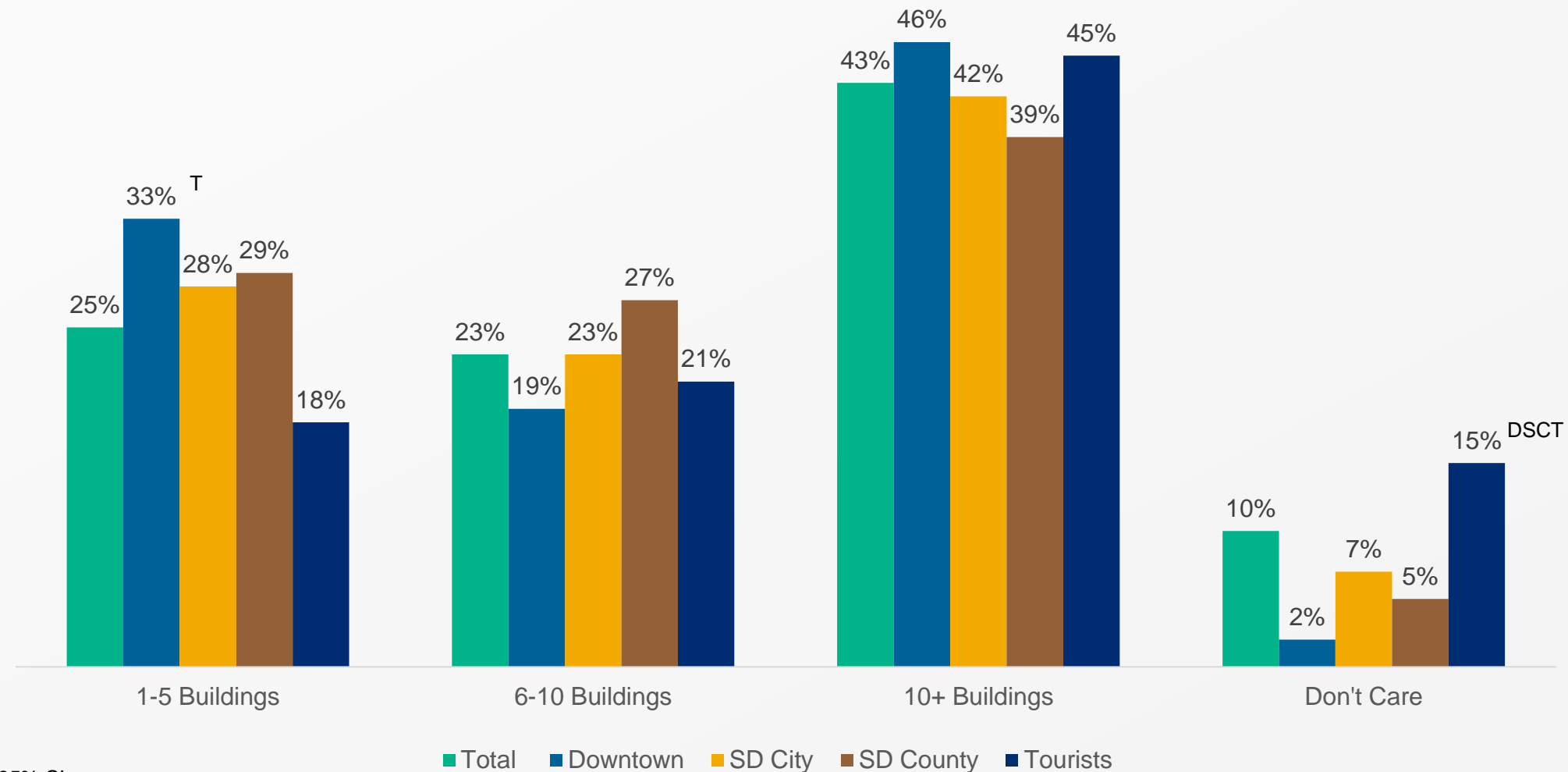
Three fourths of Downtown residents would like to allow wraps at all times. County residents and Tourists are more likely to feel they should be restricted to being allowed less than half the time.





# General Feelings Toward Building Wraps

Nearly half the people feel there should be no limit on the number of building with ads at one time.



T= Significantly higher than Tourists at the 95% CL

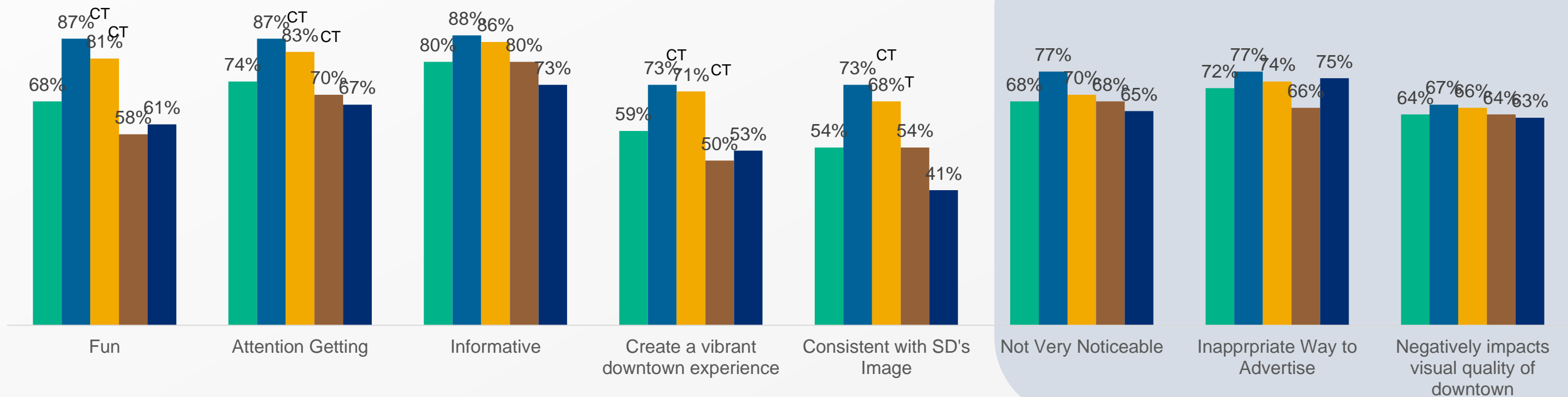
# Building Wrap Ratings

The building wraps are rated higher for being “Attention Getting”, “Informative” and “Fun”.

## Top Box - Agree

## Ratings

## Bottom Box - Disagree

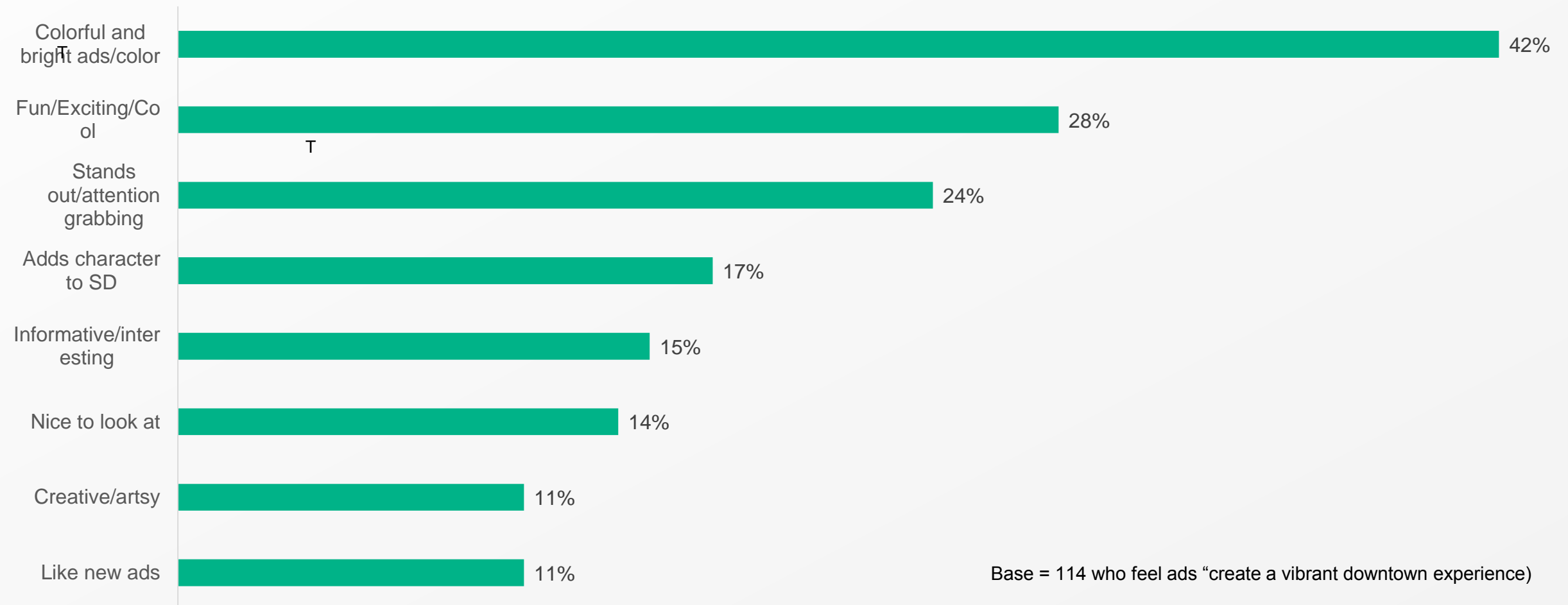


CT= Significantly higher than SD County and Tourists at the 95% CL

■ Total ■ Downtown ■ SD City ■ SD County ■ Tourists

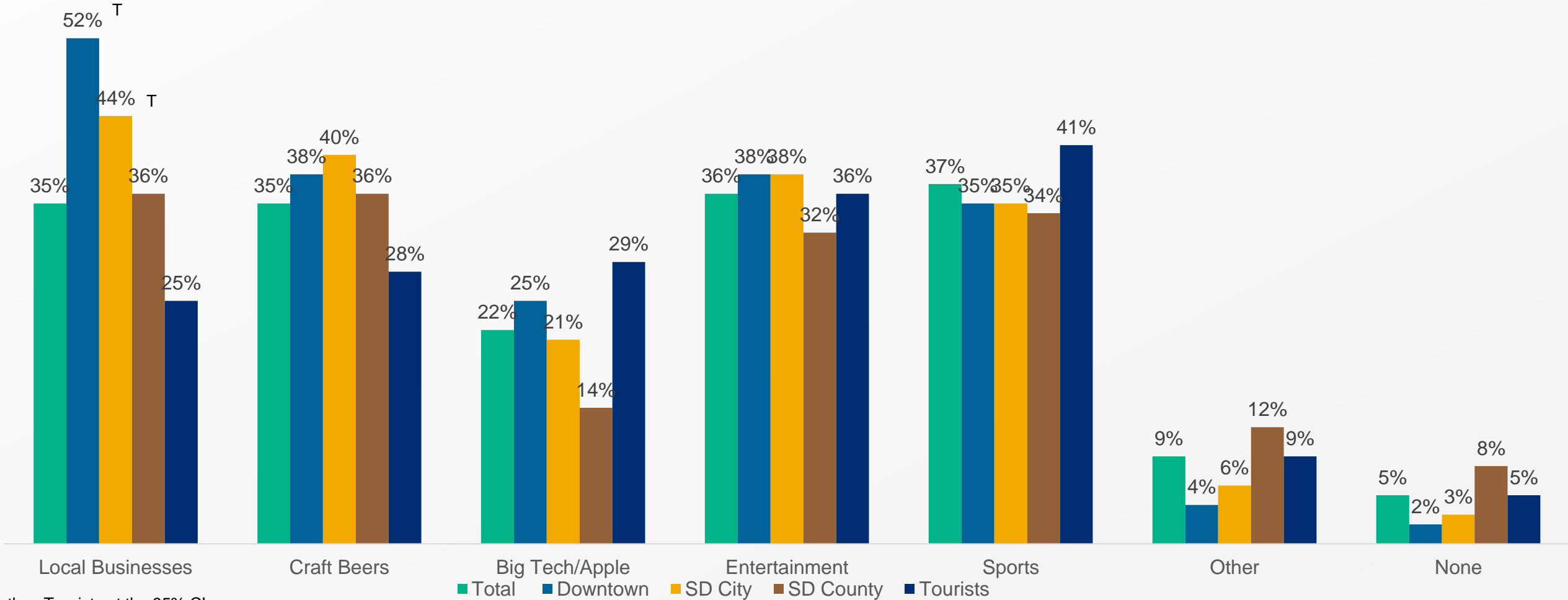
# Reasons for Creating a Vibrant Experience

The ads being bright, colorful, fun and attention grabbing are what appeals to people who feel they create a vibrant downtown experience.



# Appropriate Future Ads

Local Businesses are the leading advertisers that people would like to see on building wraps in the future.

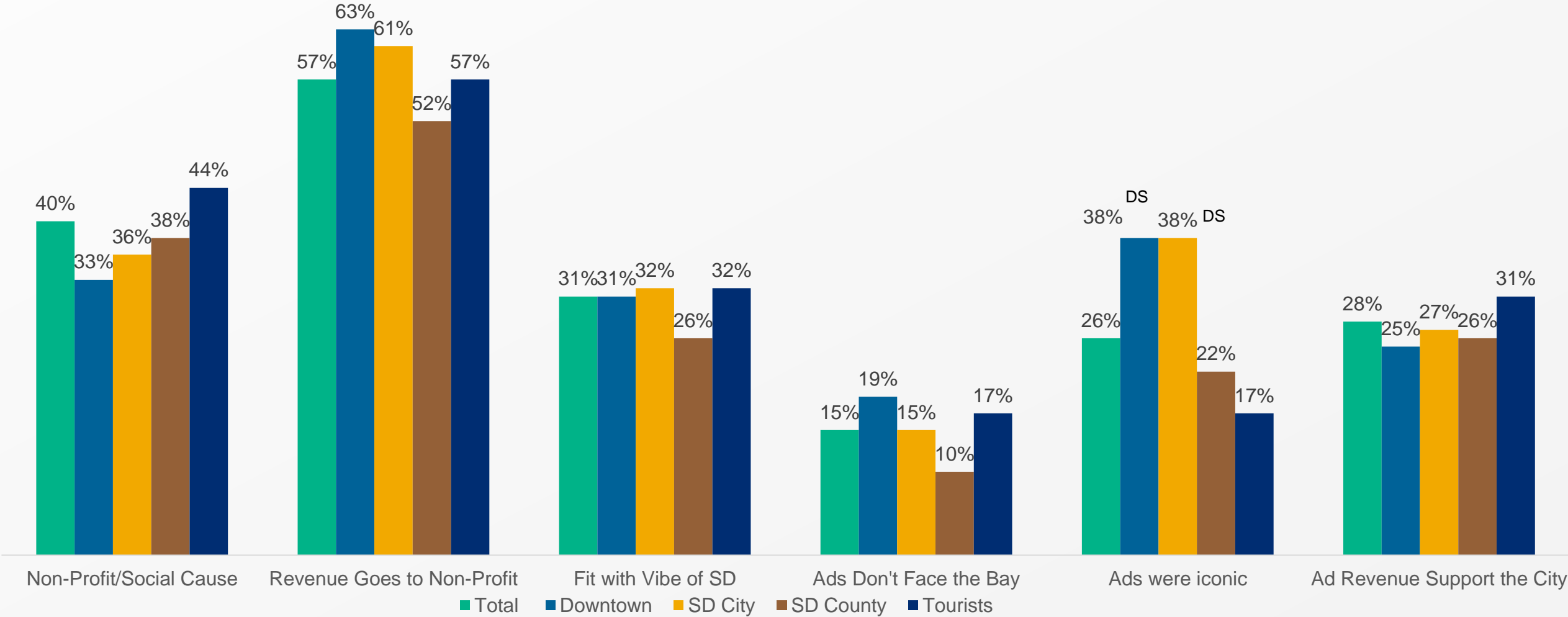


T= Significantly higher than Tourists at the 95% CL



# Actions to Create Additional Support

A portion of the ad revenue going to a non-profit will create additional support.



# Primary Residence

Both tourists and local San Diego residents participated in this survey. Locals include residents of the immediate downtown area and both the city and county of San Diego.

